



# **Interest Potential for Arctic Tourism Products in Northern Norway**

## **Interest Potentials in Six International Markets**

**On behalf of Innovation Norway**

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## Preface

The Norwegian Tourist Board commissioned IPK International and mms scandinavia to conduct a study on the interest potential for Arctic tourism products for Northern Norway in the winter.

This study was carried out in six international markets:

- Germany
- Great Britain
- France
- Italy
- The Netherlands
- Spain

Based on population representative surveys, the following topics were analyzed for each market:

- Interest for various special types of winter holidays / specific holiday activities in Northern Norway
- Price acceptance for a winter holiday in Northern Norway

The following report covers:

- An analysis of the findings per country, as well as
- Recommendations for future marketing activities based on the findings in the six countries.

The questionnaire as well as the methodology and tables per country are included in the annex.

Munich, May 2007



## A. GERMANY



## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in Germany during April 2007.

A total of  $n = 1,964$  Germans were surveyed nationwide.

The interviews were conducted face-to-face (CAPI method = Computer Aided Personal Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

# 1. Total Interest Potential for Winter Holidays in Northern Norway

## 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the Germans in total showed a basic interest in various winter holiday possibilities in Northern Norway as follows:

	Germans in Total
Interested in winter holiday possibilities in Northern Norway (total interest potential)	27%
Not interested in winter holidays in Northern Norway	73%
German population (as of 14 years) in total	100%

Source: Representative population survey (n = 1,964) in Germany, IPK International 2007

- When asked about the type of winter holiday or winter activity they would consider for a winter holiday in Northern Norway, 27% of the Germans showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In contrast, 73% of the Germans did not show any interest in winter holiday possibilities in Northern Norway.
- In other words: 27% of the Germans feel generally inclined toward some of the various winter holiday possibilities in Northern Norway and thus represent the maximum German interest potential for winter holidays in Northern Norway.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The Germans expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	German population (14+ years)	Index
<b>Gender</b>			
Male	51%	48%	106
Female	49%	52%	94
<b>Age</b>			
Up to 24 years	19%	14%	136
25 – 34 years	15%	13%	115
35 – 44 years	21%	20%	105
45 – 54 years	18%	16%	113
55 – 64 years	13%	15%	87
65 years and older	15%	23%	65
<b>Education</b>			
Low	34%	47%	72
Middle	43%	38%	113
High	22%	15%	147
<b>Household Income</b>			
Up to 1,499 euro	25%	32%	78
1,500 – 2,999 euro	51%	48%	106
3,000 euro and above	25%	20%	125
<b>Social Class</b>			
A	20%	13%	154
B	18%	15%	120
C	48%	51%	94
D/E	15%	21%	71

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
Deviations from 100% due to rounding.

	Total interest potential for winter holiday possibilities in Northern Norway	German population (14+ years)	Index
<b>Household size</b>			
1 person	18%	20%	90
2 persons	33%	37%	89
3 persons or more	49%	43%	114
<b>Children in Household</b>			
Yes	31%	27%	115
None	69%	73%	95

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
Deviations from 100% due to rounding.

Germans who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- slightly more men than women
- primarily younger and middle age groups (up to 54 years of age)
- middle and higher education levels
- middle and higher income groups
- middle and upper social classes
- most living in multi-person households
- every third having children in their households

Compared to the total German population, the interest potential for winter holiday possibilities in Northern Norway shows, above all:

- higher shares of very young age groups (up to 24 years of age)
- higher shares of high education levels and high income groups
- higher shares of upper social classes

### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The Germans expressing an interest in winter holiday possibilities in Northern Norway live in the following regions:

	Total interest potential for winter holiday possibilities in Northern Norway	German population (14+ years)	Index
Schleswig-Holstein	3%	4%	75
Hamburg	3%	2%	150
Lower Saxony	10%	10%	100
Bremen	1%	1%	100
North Rhine- Westphalia	23%	21%	110
Hesse	8%	7%	114
Rhineland-Palatine	6%	5%	120
Saarland	*	1%	31
Baden-Wuerttemberg	13%	12%	108
Bavaria	12%	15%	80
Berlin	4%	4%	100
Mecklenburg-Western Pomerania	3%	2%	150
Saxony-Anhalt	5%	3%	167
Brandenburg	2%	4%	50
Thuringia	3%	3%	100
Saxony	5%	6%	83
Total Western Germany	80%	80%	100
Total Eastern Germany	20%	20%	100

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
 Deviations from 100% due to rounding. \* = less than 0.5%

	Total interest potential for winter holiday possibilities in Northern Norway	German population (14+ years)	Index
Up to 9,999 inhabitants	27%	26%	104
10,000 – 49,999 inhabitants	31%	36%	86
50,000 – 99,999 inhabitants	12%	9%	133
100,000 – 199,999 inhabitants	7%	9%	78
200,000 – 499,999 inhabitants	10%	9%	111
500,000 inhabitants and more	13%	11%	118

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
Deviations from 100% due to rounding.

- In principle, the Germans interested in winter holiday possibilities in Northern Norway come from all states within the Federal Republic.
- Thus, the most important regional focus markets for winter holidays in Northern Norway are the most populated areas in Germany:
  - North Rhine-Westphalia (23%)
  - Baden-Wuerttemberg (13%)
  - Bavaria (12%)
  - Lower Saxony (10%)
- Nearly 60% of the Germans expressing an interest in winter holiday possibilities in Northern Norway live in these states (“Bundesländer”).



- Compared to the total population, an above-average propensity towards winter holiday possibilities in Northern Norway is also shown in the (northern) states of:
  - Hamburg
  - Mecklenburg-Western Pomeraniaand also
  - Saxony-Anhalt.
- On the whole, 80% of Germans interested in winter holiday possibilities in Northern Norway live in Western Germany and 20% in Eastern Germany.
- As concerns the city size where the interested are living, a distribution similar to the overall population is seen. Thus,
  - about 25% of the interested live in rural regions,
  - about 45% live in smaller and mid-sized cities (under 100,000 residents),
  - and about 30% in large cities (more than 100,000 residents).



## 1.4. Internet Access among the Total Interest Potential for Winter Holidays in Northern Norway

Germans expressing an interest in winter holiday possibilities in Northern Norway have the following Internet access rates:

	Total interest potential for winter holiday possibilities in Northern Norway	German population (14+ years)	Index
Yes	78%	65%	120
No	22%	35%	63

Source: Representative population survey (n =1,964) in Germany, IPK International 2007

- About 80% of the Germans showing an interest in winter holiday possibilities in Northern Norway have Internet access.
- Compared to the total German population, Internet access is clearly higher among those Germans interested in a winter holiday in Northern Norway.
- Thus, a very high number of the interested can be addressed via the Internet.

## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the Germans responded as follows:

Type of Holiday	Germans in Total
Winter tour with Northern Lights experience	11%
Winter cruise along the Norwegian Coast "Hurtigruten"	9%
Dog sledding tours	9%
Winter whale watching / "Killer Whale Safari"	8%
Winter North Cape tour	7%
Experiencing Sami culture with reindeer driving	7%
Staying at an "ice hotel"	6%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	6%
Visiting "Santa Claus" in Northern Norway	5%
Cross-country skiing holiday in Northern Norway	4%
Alpine skiing holiday in Northern Norway	4%
Arctic "Art & Culture" tour	4%
Winter deep sea fishing, organized, with a guide	3%
Winter deep sea rafting (in large rubber dinghies)	2%
Winter crab fishing / "King Crab Safari"	1%
Not interested in winter holidays in Northern Norway	73%

Source: Representative population survey (n = 1,964) in Germany, IPK International 2007  
Multiple answers possible.

- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited about three holiday types.
- The following winter offers for Northern Norway hold the largest interest in the German market:
  - Wintertime tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Dog sledding tours
  - Winter whale watching / “Killer Whale Safari”

Each of these holiday types appeal to 8–11% of the Germans.

- There is also an interest shown in offers such as
  - experiencing Sami culture with reindeer driving
  - North Cape touror offers focusing on
  - staying at a hotel offering various winter activities
  - staying at an “ice hotel”

Each of these holiday types appeal to 6–7% of the Germans.

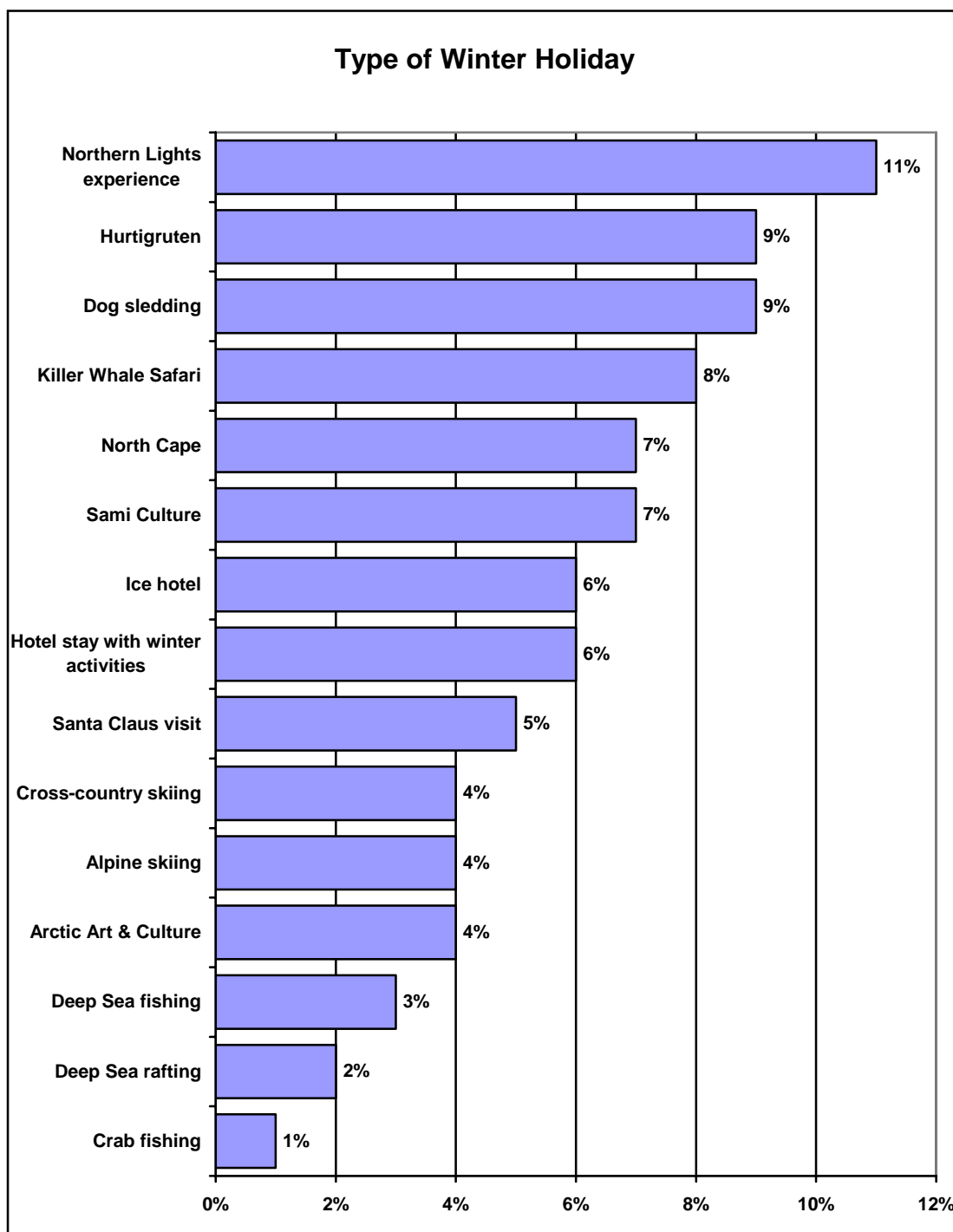
- In comparison thereto, the interest in other holiday possibilities is lower. About 4-5% of the Germans in each case show an interest for:
  - Visiting “Santa Claus”
  - Cross-country skiing holiday
  - Alpine skiing holiday
  - Arctic “Art & Culture” tour
- The least interest can be noted for:
  - Deep sea fishing (3%)
  - Deep sea rafting (2%)
  - “King Crab Safari” (1%)
- Thus, the Germans’ interest in a winter holiday in Northern Norway should primarily be addressed via
  - Northern Lights experience
  - Cruises along the Norwegian Coast / “Hurtigruten”
  - Dog sledding tours
  - “Killer Whale Safari”

About 70% of the Germans with an interest in winter holiday possibilities in Northern Norway can be addressed via such offers.

- There is also a certain interest on the German market in “experiencing Sami culture in winter with reindeer driving,” however, not in “Arctic Art and Culture.”
- A North Cape tour can above all be seen in conjunction with a Northern Lights experience and less as a distinct separate offer.



- Likewise not suitable as a distinct single offer for the German market is that of “Visiting Santa Claus.”
- The Germans’ interest in winter sport holidays in Northern Norway is also limited (cross-country as well as alpine skiing).
- There is hardly any interest within the German market for a “Deep Sea” experience or crab fishing in Northern Norway.



Source: Representative population survey (n = 1,964) in Germany, IPK International 2007  
Multiple answers possible.



### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the Germans expressing interest in winter holiday possibilities in Northern Norway responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	Germans interested in winter holiday possibilities in Northern Norway
More than € 3,000	2%
Up to € 3,000	6%
Up to € 2,500	4%
Up to € 2,000	17%
Up to € 1,500	25%
Up to € 1,000	33%
Up to € 500	9%
Less than € 500	2%
Don't know	3%

Source: Representative population survey (n = 1,964) in Germany, IPK International 2007

- Most Germans interested in winter holiday possibilities (58%) would be willing to spend between 1,000 and 1,500 euro for a one-week winter holiday in Northern Norway, including all additional travel costs.



- 17% would be willing to spend up to 2,000 euro and 12% would be willing to spend more than 2,000 euro for a one-week winter holiday in Northern Norway.
- Regarding the price acceptance, it should be noted that it is primarily the 25+ age groups who are willing to spend more than 1,000 euro for a winter holiday in Northern Norway.

## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Dog sledding tour	Whale watching	North Cape tour	Sami Culture
<b>Gender</b>							
Male	51%	50%	55%	49%	51%	50%	53%
Female	49%	50%	45%	51%	49%	50%	47%
<b>Age</b>							
Up to 24 years	19%	15%	11%	28%	22%	10%	15%
25 – 34 years	15%	9%	7%	15%	17%	13%	14%
35 – 44 years	21%	26%	18%	28%	23%	25%	18%
45 – 54 years	18%	21%	22%	15%	16%	20%	20%
55 – 64 years	13%	15%	21%	7%	14%	16%	18%
65 years and older	15%	15%	20%	6%	9%	16%	15%
<b>Education</b>							
Low	34%	32%	34%	33%	33%	30%	35%
Middle	43%	45%	45%	48%	44%	49%	38%
High	22%	23%	22%	19%	23%	22%	27%
<b>Household Income</b>							
Up to 1,499 euro	25%	23%	26%	24%	21%	21%	29%
1,500 – 2,999 euro	51%	50%	53%	51%	54%	60%	47%
3,000 euro and more	25%	26%	21%	24%	23%	21%	23%

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
Deviations from 100% due to rounding.

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Dog sledding tour	Whale watching	North Cape tour	Sami Culture
<b>Social Class</b>							
D/E	15%	11%	14%	19%	18%	10%	14%
C	48%	52%	49%	48%	42%	54%	46%
B	18%	16%	15%	17%	17%	16%	17%
A	20%	21%	22%	16%	22%	20%	23%
<b>Size of Household</b>							
1 person	18%	17%	20%	16%	13%	16%	18%
2 persons	33%	41%	42%	26%	30%	36%	40%
3 persons and more	49%	43%	38%	58%	57%	49%	43%
<b>Children in Household</b>							
Yes	31%	29%	21%	40%	41%	31%	33%
None	69%	71%	79%	60%	59%	69%	67%

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
Deviations from 100% due to rounding.

- The socio-demographic profiles for the holiday types indicated above are primarily differentiated to the following extent:
  - Tour offers (Northern Lights tour, Hurtigruten, North Cape tour): overall: more middle age groups (35+ years) and of less interest to younger ones  
Hurtigruten: somewhat more men, older age groups, no children
  - Dog sledding: younger (up to 44 years), more often children in household
  - Whale watching: basically all age groups, yet more often children in household



- Regarding education and household income levels, the differences noted for the various types of holidays are not as strongly pronounced.
- It can thus be said as a general rule for the German market that the target group differences between the individual types of holiday are primarily distinguished by age but not, however, by income or education level (with the middle and higher levels basically prevailing).

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the regional source markets:

Regions of origin	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Dog sledding tour	Whale watching	North Cape tour	Sami Culture
North Rhine-Westphalia	23%	25%	24%	21%	23%	23%	28%
Baden-Wuerttemberg	13%	13%	12%	12%	11%	6%	14%
Bavaria	12%	14%	11%	13%	13%	10%	18%
Lower Saxony	10%	9%	12%	8%	10%	8%	5%
Hesse	8%	7%	8%	9%	8%	12%	11%
Rhineland-Palatine	6%	4%	6%	7%	4%	5%	3%
Saxony	5%	6%	4%	5%	5%	5%	3%
Saxony-Anhalt	5%	2%	2%	4%	6%	6%	4%
Berlin	4%	4%	7%	3%	4%	8%	3%
Thuringia	3%	4%	4%	4%	3%	3%	1%
Schleswig-Holstein	3%	4%	4%	3%	3%	6%	3%
Hamburg	3%	4%	3%	6%	5%	4%	4%
Mecklenburg-Western Pomerania	3%	4%	3%	3%	4%	2%	4%
Brandenburg	2%	1%	*	3%	1%	1%	1%
Bremen	1%	*	*	*	*	*	*
Saarland	*	1%	*	*	1%	1%	1%
Total Western Germany	80%	82%	83%	80%	80%	79%	87%
Total Eastern Germany	20%	18%	17%	20%	20%	21%	13%

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
 Deviations from 100% due to rounding. \* = less than 0.5%

Size of town	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Dog sledding tour	Whale watching	North Cape tour	Sami Culture
Up to 9.999 inhabitants	27%	26%	24%	35%	32%	20%	31%
10.000 – 49.999 inhabitants	31%	31%	39%	25%	33%	34%	24%
50.000 – 99.999 inhabitants	12%	11%	10%	10%	10%	12%	11%
100.000 – 199.999 inhabitants	7%	9%	7%	9%	7%	10%	8%
200.000 – 499.999 inhabitants	10%	8%	6%	7%	5%	8%	12%
500.000 inhabitants and more	13%	16%	15%	14%	14%	16%	15%

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
 Deviations from 100% due to rounding.

- No special preference is seen for any one specific type of holiday based on regional source market.

### 4.3. Price Acceptance by Type of Holiday

Differentiating the price acceptance of the winter holiday interest potential by holiday types reveals the following:

Price	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Dog sledding tour	Whale watching	North Cape tour	Sami Culture
More than € 3,000	2%	1%	2%	1%	1%	1%	1%
Up to € 3,000	6%	5%	7%	6%	6%	6%	8%
Up to € 2,500	4%	5%	4%	4%	4%	6%	3%
Up to € 2,000	17%	13%	15%	18%	19%	13%	16%
Up to € 1,500	25%	31%	28%	25%	27%	27%	29%
Up to € 1,000	33%	34%	36%	32%	31%	36%	30%
Up to € 500	9%	7%	5%	9%	8%	7%	6%
Less than € 500	2%	3%	1%	2%	4%	2%	3%
Don't know	3%	1%	1%	4%	2%	3%	4%

Source: Representative population survey (n =1,964) in Germany, IPK International 2007  
 Deviations from 100% due to rounding.

- Irrespective of the individual holiday interests, the price acceptance for a one-week winter holiday in Northern Norway generally lies between 1,000 and 1,500 euro.



## 5. Summary: German Market

Summarizing the most important findings of the population survey reveals the following:

- 27% of the Germans show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger and middle age groups (up to 54 years)
  - middle and upper social classes (education levels and income brackets).
- There is in principle a nationwide interest in winter holiday possibilities in Northern Norway.
- The following winter offers for Northern Norway attract the largest interest in the German market:
  - Winter tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Dog sledding tours
  - Winter whale watching / “Killer Whale Safari”
- The least interest is shown for:
  - Deep Sea fishing
  - Deep Sea rafting
  - “King Crab Safari”



- The price acceptance for winter holidays in Northern Norway is generally between 1,000 and 1,500 euro (regardless of holiday type).



## **B. GREAT BRITAIN**



## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in Great Britain during April 2007.

A total of  $n = 2,000$  British were surveyed nationwide.

The interviews were conducted face-to-face (CAPI method = Computer Aided Personal Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

## 1. Total Interest Potential for Winter Holidays in Northern Norway

### 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the British in total showed a basic interest in the various winter holiday possibilities in Northern Norway as follows:

	<b>British in Total</b>
Interested in winter holiday possibilities in Northern Norway (total interest potential)	25%
Not interested in winter holidays in Northern Norway	75%
British population (as of 16 years) in total	100%

Source: Representative population survey (n = 2,000) in Great Britain, IPK International 2007

- When asked about the type of winter holiday or winter activity they would consider for a winter holiday in Northern Norway, 25% of the British showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In contrast, 75% of the British did not show any interest in winter holiday possibilities in Northern Norway.
- In other words: 25% of the British feel generally inclined toward some of the various winter holiday possibilities in Northern Norway and thus represent the maximum British interest potential for winter holidays in Northern Norway.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The British expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	British population (16+ years)	Index
<b>Gender</b>			
Male	48%	48%	100
Female	52%	52%	100
<b>Age</b>			
Up to 24 years	19%	14%	136
25 – 34 years	22%	16%	138
35 – 44 years	23%	20%	115
45 – 54 years	17%	16%	106
55 – 64 years	12%	15%	80
65 years and older	8%	20%	40
<b>Social Class</b>			
AB	30%	20%	150
C1	36%	28%	129
C2	18%	20%	90
DE	16%	32%	50
<b>Household size</b>			
1 person	13%	18%	72
2 persons	33%	33%	100
3 persons or more	54%	49%	110
<b>Children in Household</b>			
Yes	36%	33%	109
None	64%	67%	96

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007  
Deviations from 100% due to rounding.



The British who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- both men and women
- primarily younger and middle age groups (up to 54 years of age)
- upper middle and upper social classes
- most living in multi-person households
- every third having children in their households

Compared to the total British population, the interest potential for a winter holiday in Northern Norway shows above all:

- higher shares of younger age groups (up to 34 years of age)
- higher shares of upper social classes

### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The British expressing an interest in winter holiday possibilities in Northern Norway live in the following regions:

	Total interest potential for winter holiday possibilities in Northern Norway	British population (16+ years)	Index
North East	3%	4%	75
North West	9%	12%	75
Yorkshire and Humberside	9%	8%	113
East Midlands	8%	8%	100
West Midlands	7%	10%	70
South West	9%	8%	113
East of England	11%	9%	122
London	12%	12%	100
South East	20%	14%	143
Wales	6%	5%	120
Scotland	7%	9%	78

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007  
 Deviations from 100% due to rounding.

- In principle, the British interested in winter holiday possibilities in Northern Norway come from all over the British Isles.



- Yet, based on population and the interest expressed, the most important regional focus markets for winter holidays in Northern Norway are:
  - South East England (20%)
  - London (12%)
  - East England (11%)

Approximately 45% of the British interested in winter holiday possibilities in Northern Norway live in the Eastern and Southeastern parts of Great Britain.

- South East England in particular shows an above-average interest in winter holiday possibilities in Northern Norway.



## 1.4. Internet Access among the Total Interest Potential for Winter Holidays in Northern Norway

The British expressing an interest in winter holiday possibilities in Northern Norway have the following rates of Internet access:

	Total interest potential for winter holiday possibilities in Northern Norway	British population (16+ years)	Index
Yes	79%	61%	130
No	21%	39%	54

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007

- About 80% of the British showing an interest in winter holiday possibilities in Northern Norway have Internet access.
- Compared to the total British population, Internet access is clearly higher among those British interested in a winter holiday in Northern Norway.
- Thus, a very high number of those interested can be addressed via the Internet.

## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the British responded as follows:

Type of Holiday	British in Total
Winter tour with Northern Lights experience	8%
Winter whale watching / "Killer whale Safari"	8%
Winter cruise along the Norwegian Coast / "Hurtigruten"	7%
Alpine skiing holiday in Northern Norway	7%
Visiting "Santa Claus" in Northern Norway	5%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	5%
Staying at an "ice hotel"	5%
Dog sledding tours	5%
Cross-country skiing holiday in Northern Norway	4%
Winter deep sea fishing, organized, with a guide	3%
Experiencing Sami culture with reindeer driving	3%
Winter North Cape tour	2%
Arctic "Art & Culture" tour	2%
Winter deep sea rafting (in large rubber dinghies)	2%
Winter crab fishing / "King Crab tour"	1%
Not interested in winter holidays in Northern Norway	75%

Source: Representative population survey (n = 2,000) in Great Britain, IPK International 2007  
Multiple answers possible.

- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited about two to three holiday types.
- The following winter offers for Northern Norway hold the largest interest for the British market:
  - Winter tour with Northern Lights experience
  - Winter whale watching / “Killer Whale Safari”
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Alpine skiing holiday in Northern Norway

Each of these holiday types appeal to 7–8% of the British.

- There is also an interest shown for so-called “stationary” offers such as
  - staying at a hotel offering various winter activities
  - staying at an ice hoteland offers focusing on
  - visiting Santa Claus
  - dog sledding tours

Each of these holiday types appeal to 5% of the British.

- In comparison thereto, the interest potential for the other holiday types is lower (4% or 3%):
  - Cross-country skiing holidays
  - Deep Sea fishing in winter
  - Experiencing Sami culture

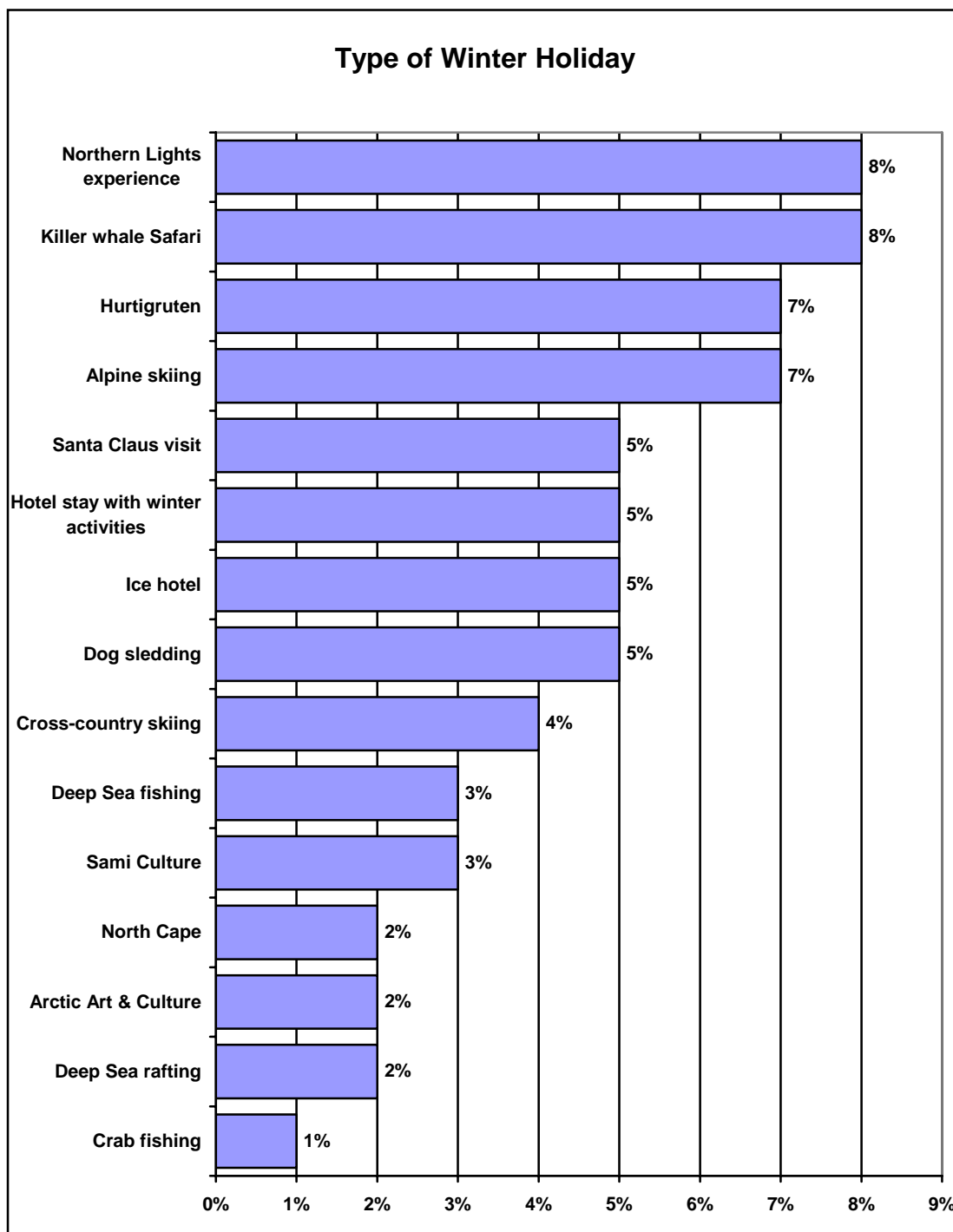
And the least interest is expressed for:

- North Cape tour in winter (2%)
  - Arctic Art & Culture (2%)
  - Deep Sea rafting (2%)
  - Crab fishing (1%)
- Thus, the British interest in a Northern Norway winter holiday should primarily be addressed via:
    - Northern Lights experience
    - Whale watching
    - Cruises along the Norwegian Coast / “Hurtigruten”

About 75% of the British with interest in winter holiday possibilities in Northern Norway can be addressed via such offers.

- In addition, there is also an interest in the British market for:
  - alpine skiing

(In contrast, less interest is shown for dog sledding and other winter activities such as ice fishing, snowmobiling, etc.)
- There is hardly any British market interest for a Deep Sea experience or crab fishing in Northern Norway, nor is there interest in Sami Culture or Arctic Art & Culture holidays.



Source: Representative population survey (n = 2,000) in Great Britain, IPK International 2007  
Multiple answers possible.

### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the British expressing interest in winter holiday possibilities responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	British interested in winter holiday possibilities in Northern Norway
More than £ 2,035 / € 3,000	2%
Up to £ 2,035 / € 3,000	5%
Up to £ 1,695 / € 2,500	8%
Up to £ 1,355 / € 2,000	14%
Up to £ 1,015 / € 1,500	35%
Up to £ 675 / € 1,000	20%
Less than £ 340 / € 500	6%
Don't know	8%

Source: Representative population survey (n = 2,000) in Great Britain, IPK International 2007

- Most British interested in winter holiday possibilities (55%) would be willing to spend between 1,000 and 1,500 euro (between £ 650 to 1,000) for a one-week winter holiday in Northern Norway, including all additional travel costs.
- 14% would be willing to spend up to 2,000 euro (£ 1,350) and 15% would be willing to spend more than 2,000 euro (£ 1,350) for a one-week winter holiday in Northern Norway.

## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway				
	Total	Northern Lights tour	Whale watching	Hurtigruten cruise	Alpine skiing
<b>Gender</b>					
Male	48%	46%	47%	49%	58%
Female	52%	54%	53%	51%	42%
<b>Age</b>					
Up to 24 years	19%	16%	11%	8%	25%
25 – 34 years	22%	21%	20%	18%	36%
35 – 44 years	23%	19%	30%	22%	28%
45 – 54 years	17%	17%	20%	18%	8%
55 – 64 years	12%	16%	14%	24%	2%
65 years and older	8%	12%	4%	11%	1%
<b>Social Class</b>					
AB	30%	40%	33%	39%	43%
C1	36%	33%	32%	32%	34%
C2	18%	14%	22%	16%	13%
DE	16%	13%	13%	14%	10%
<b>Size of Household</b>					
1 person	13%	14%	11%	15%	7%
2 persons	33%	35%	32%	44%	31%
3 persons and more	54%	51%	57%	41%	62%
<b>Children in HH</b>					
Yes	36%	31%	37%	22%	44%
None	64%	69%	63%	78%	56%

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007  
Deviations from 100% due to rounding.





The socio-demographic profiles for the holiday types indicated above are primarily differentiated to the following extent:

- The target groups for the main products (Northern Lights tour, whale watching and Hurtigruten cruise) do not differ substantially from one another:
  - 25+ years (less interest among the youngest group up to 24 years)
  - highest share of older target groups: Hurtigruten cruise
  - primarily upper middle and upper social classes
- Primary interest in alpine skiing is shown by:
  - younger age groups (up to 44 years)
  - more men than women
  - upper middle and upper social classes
  - more frequently having children

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the regional source markets:

Regional Source Markets	Winter Holiday Interest Potential for Northern Norway				
	Total	Northern Lights tour	Whale watching	Hurtigruten cruise	Alpine skiing
North East	3%	1%	1%	1%	1%
North West	9%	8%	10%	6%	9%
Yorkshire and Humberside	9%	10%	12%	17%	6%
East Midlands	8%	11%	10%	9%	11%
West Midlands	7%	4%	7%	5%	5%
South West	9%	9%	8%	11%	8%
East of England	11%	14%	11%	12%	15%
London	12%	12%	11%	8%	10%
South East	20%	22%	17%	21%	23%
Wales	6%	3%	7%	5%	4%
Scotland	7%	6%	5%	5%	8%

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007  
Deviations from 100% due to rounding.

- There is no special preference seen for any one type of holiday by specific regional source market. The main regional source markets for all the holiday types are London / East England / South East England.

### 4.3. Price Acceptance by Type of Holiday

Differentiating the price acceptance for the winter holiday interest potential by holiday types reveals the following:

Price	Winter Holiday Interest Potential for Northern Norway -				
	Total	Northern Lights tour	Whale watching	Hurtigruten cruise	Alpine skiing
More than £ 2,035 / €3,000	2%	2%	3%	1%	2%
Up to £ 2,035 / €3,000	5%	4%	4%	6%	5%
Up to £ 1,695 / €2,500	8%	12%	9%	15%	7%
Up to £ 1,355 / €2,000	14%	21%	16%	18%	14%
Up to £ 1,015 / €1,500	35%	37%	40%	29%	35%
Up to £ 675 / €1,000	20%	17%	17%	17%	26%
Less than £ 340 / €500	6%	3%	4%	2%	4%
Don't know	8%	6%	8%	12%	6%

Source: Representative population survey (n =2,000) in Great Britain, IPK International 2007  
Deviations from 100% due to rounding.

- In principle, the greatest spending level acceptance for a winter holiday in Northern Norway is between £ 675 and 1,015 (1,000 to 1,500 euro); this holds equally true for all the holiday types.
- A somewhat lower price acceptance is noted for alpine skiing holidays. They should primarily be priced at about £ 675 (1,000 euro).

## 5. Summary: British Market

Summarizing the most important findings of the population survey reveals the following:

- 25% of the British show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger and middle age groups (up to 54 years)
  - upper middle and upper social classes
- Regional markets of focus are London, East of England and South East England.
- The following winter offers for Northern Norway attract the largest interest in the British market:
  - Winter tour with Northern Lights experience
  - Winter whale watching / “Killer Whale Safari”
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Alpine skiing
- The least interest is shown for:
  - Deep Sea fishing
  - Experiencing Sami culture
  - North Cape tour in winter
  - Arctic Art and Culture
  - Deep Sea rafting
  - “King Crab Safari”



- The principal price acceptance level for winter holidays in Northern Norway is between 1,000 and 1,500 euro (£ 675 - 1,000).

## C. FRANCE

## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in France during April 2007.

A total of  $n = 2,000$  French were surveyed nationwide.

The interviews were conducted face-to-face (CAPI method = Computer Aided Personal Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

# 1. Total Interest Potential for Winter Holidays in Northern Norway

## 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the French in total showed a basic interest in various winter holiday possibilities in Northern Norway as follows:

	<b>French in Total</b>
Interested in winter holiday possibilities in Northern Norway (total interest potential)	69%
Not interested in winter holidays in Northern Norway	31%
French population (as of 15 years) in total	100%

Source: Representative population survey (n = 2,000) in France, IPK International 2007

- When asked about the type of winter holiday or winter activity they would consider for a winter holiday in Northern Norway, 69% of the French showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In the long run, this extremely high value is not due more or less to any concrete intention to travel to Northern Norway during the winter, but rather far more the appeal of the specific concrete winter trips offered to Northern Norway as featured in the survey.





- In other words: 69% of the French feel generally inclined toward some of the various winter holiday possibilities in Northern Norway, irrespective of whether they had ever seriously weighed a winter holiday in Northern Norway before.\*

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\* Numerous surveys IPK has conducted in the French market have shown that there is frequently a large discrepancy in this market between the “enthusiasm” which the surveyed population shows for specific outbound holiday destinations and the actual travel behavior as realized, the latter being more a pattern of a relatively high percentage of the population ultimately taking domestic holidays and not traveling to a foreign country.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The French expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	French population (15+ years)	Index
<b>Gender</b>			
Male	48%	48%	100
Female	52%	52%	100
<b>Age</b>			
Up to 24 years	18%	16%	113
25 – 34 years	17%	16%	106
35 – 44 years	21%	19%	111
45 – 54 years	16%	15%	107
55 – 64 years	14%	14%	100
65 years and older	14%	20%	70
<b>Education</b>			
Low	19%	26%	73
Middle	39%	37%	105
High	42%	37%	114
<b>Household Income</b>			
Up to 1,219 euro	21%	25%	84
1220 – 3,049 euro	59%	58%	102
3,050 euro and more	20%	17%	118

Source: Representative population survey (n =2,000) in France, IPK International 2007  
Deviations from 100% due to rounding.

	Total interest potential for winter holiday possibilities in Northern Norway	French population (15+ years)	Index
<b>Household size</b>			
1 person	14%	16%	88
2 persons	30%	33%	91
3 persons or more	56%	51%	110
<b>Children in Household</b>			
Yes	38%	34%	112
None	62%	66%	94

Source: Representative population survey (n =2,000) in France, IPK International 2007  
 Deviations from 100% due to rounding.

The French who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- both men and women
- primarily younger and middle age groups (up to 54 years of age)
- middle and higher education levels
- middle and higher income groups
- most living in multi-person households
- nearly 40% having children in their households

Compared to the total French population, the interest potential for winter holiday possibilities in Northern Norway shows above all:

- higher shares of very young age groups (up to 24 years of age) and also 35-44 years olds
- higher shares of high education levels and high income groups
- higher shares of families with children

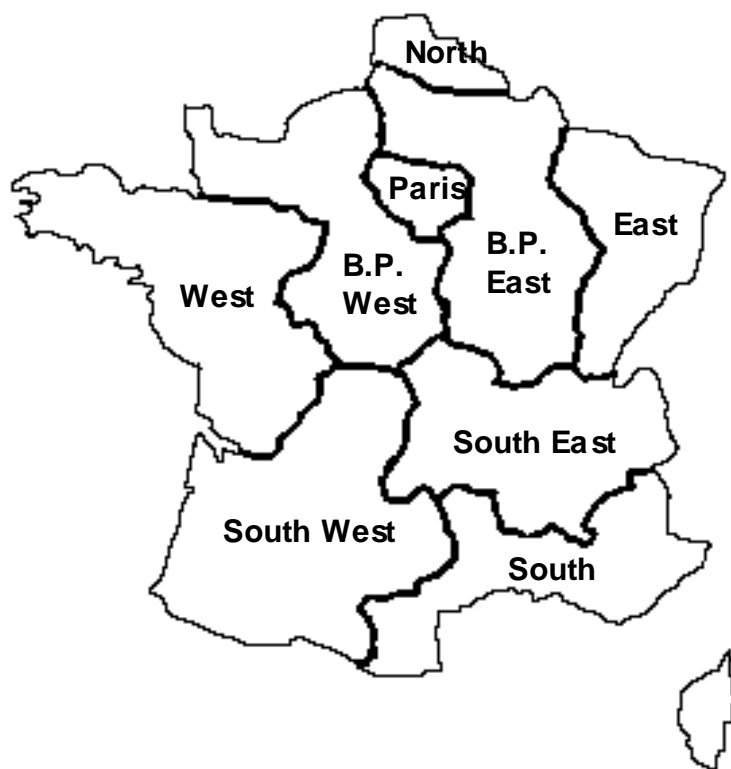
### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The French expressing an interest in winter holiday possibilities in Northern Norway live in the following regions:

	Total interest potential for winter holiday possibilities in Northern Norway	French population (15+ years)	Index
<b>Region</b>			
Ile de France	20%	19%	105
BP East	8%	8%	100
BP West	8%	10%	80
North	6%	7%	86
East	9%	9%	100
West	14%	13%	108
South West	12%	11%	109
South East	13%	12%	108
Mediterranean	12%	12%	100
<b>Size of Town of Residence</b>			
Up to 1,999 inhabitants	24%	25%	96
2,000 – 19,999 inhabitants	16%	17%	94
20,000 – 100,000 inhabitants	13%	13%	100
100,000 inhabitants and more	28%	29%	97
Paris	18%	16%	113

Source: Representative population survey (n =2,000) in France, IPK International 2007  
Deviations from 100% due to rounding.

- In principle, the French interested in winter holiday possibilities in Northern Norway come from all parts of France.
- Compared to the total population, an above-average propensity toward winter holiday possibilities in Northern Norway is shown in:
  - Ile de France with the capital Paris (20%)
  - West and South West France (26%)
  - South East France (13%)
- As concerns the size of the city in which those interested live, a distribution similar to the overall population is seen. Thus,
  - about 40% of the interested live in more rural regions,
  - about 15% live in smaller and mid-sized cities (under 100,000 residents),
  - and about 45% live either in Paris or in the other large cities of more than 100,000 residents.



## 1.4. Internet Access among the Total Interest Potential for Winter Holidays in Northern Norway

The French expressing an interest in winter holiday possibilities in Northern Norway have the following Internet access rates:

	Total interest potential for winter holiday possibilities in Northern Norway	French population (15+ years)	Index
Yes	71%	64%	111
No	29%	36%	81

Source: Representative population survey (n =2,000) in France, IPK International 2007

- About 70% of the French showing an interest in winter holiday possibilities in Northern Norway have Internet access.
- Compared to the total French population, Internet access is clearly higher among those French interested in a winter holiday in Northern Norway.
- Thus, a very high number of the interested can be addressed via the Internet.

## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the French responded as follows:

Type of Holiday	French in Total
Dog sledding tours	37%
Winter whale watching / "Killer Whale Safari"	26%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	22%
Winter cruise along the Norwegian Coast / "Hurtigruten"	20%
Winter tour with Northern Lights experience	19%
Experiencing Sami culture with reindeer driving	16%
Visiting "Santa Claus" in Northern Norway	16%
Cross-country skiing holiday in Northern Norway	15%
Alpine skiing holiday in Northern Norway	15%
Staying at an "ice hotel"	12%
Winter North Cape tour	12%
Arctic "Art & Culture" tour	11%
Winter deep sea fishing, organized, with a guide	11%
Winter deep sea rafting (in large rubber dinghies)	9%
Winter big crab fishing / "King Crab Safari"	5%
Not interested in winter holidays in Northern Norway	31%

Source: Representative population survey (n = 2,000) in France, IPK International 2007  
Multiple answers possible.



- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited about three to four holiday types.
- The by far largest interest for the French lies in:
  - Dog sledding tours

37% of the French would find such dog sledding tours appealing.

- In addition, many of the French also feel especially drawn to the following Northern Norway offers:
  - Winter whale watching / “Killer Whale Safari”
  - Staying at a hotel offering various winter activities
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Winter tour with Northern Lights experience

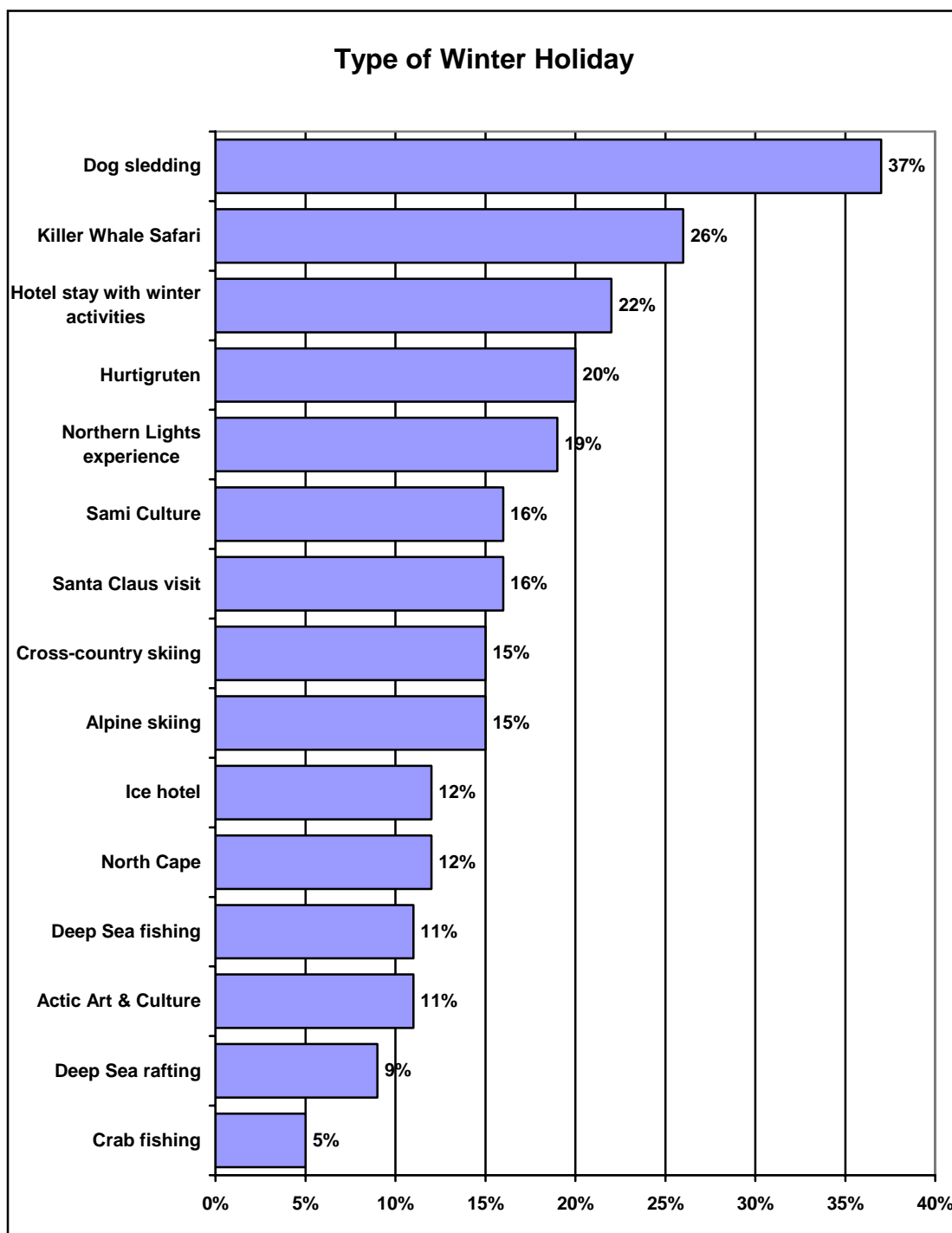
In each case, these holiday prospects appeal to between 19 and 26% of the French.

- In contrast, there is quite less acceptance for all the other holiday possibilities (less than 16% interested):
  - experiencing Sami culture with reindeer driving
  - Visiting “Santa Claus”
  - Cross-country skiing holiday
  - Alpine skiing holiday
  - staying at an “ice hotel”
  - North Cape tour
  - Deep Sea fishing
  - Arctic “Art & Culture” tour

- The least interest can be noted for:
  - Deep Sea rafting (9%)
  - “King Crab Safari” (5%)

Summarizing the preferences shown by the French as far as winter holiday possibilities in Northern Norway reveals the following:

- “Dog sledding” is of essentially high attractiveness for the French market when considering winter holidays in Northern Norway. Dog sledding should thus be a fixed program component in all the winter offers for Northern Norway.
- Apart from this particularly pronounced affinity for “dog sledding,” the French market also shows interest in the following products:
  - Whale watching
  - Hurtigruten cruises
  - Northern Lights experiencesas well as
  - stationary stays in a hotel offering various winter activities
- Thus, in principle, the interests of the French for Northern Norway in the winter could thereby be addressed via two basic offers:
  - Hurtigruten cruise with whale watching and dog sledding
  - Stationary stays in a hotel offering various northern winter activities (dog sledding, snow-scooter, etc.)



Source: Representative population survey (n = 2,000) in France, IPK International 2007  
Multiple answers possible.

### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the French expressing interest in winter holiday possibilities in Northern Norway responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	French interested in winter holiday possibilities in Northern Norway
More than €3,000	2%
Up to €3,000	4%
Up to €2,500	4%
Up to €2,000	12%
Up to €1,500	20%
Up to €1,000	31%
Up to €500	15%
Less than €500	7%
Don't know	4%

Source: Representative population survey (n = 2,000) in France, IPK International 2007

- Most of the French interested in winter holiday possibilities (51%) would be willing to spend between 1,000 and 1,500 euro for a one-week winter holiday in Northern Norway, including all additional travel costs.



- 12% would be willing to spend up to 2,000 euro and 10% would be willing to spend more than 2,000 euro for a one-week winter holiday in Northern Norway.
- 22% of the French expressing interest in winter holiday possibilities in Northern Norway are not willing to pay more than 500 euro for a one-week winter holiday in Northern Norway.

## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway					
	Total	Dog sledding tour	Whale watching	Hotel stay with activities	Hurtigruten	Northern Lights tour
<b>Gender</b>						
Male	48%	47%	44%	49%	45%	45%
Female	52%	53%	56%	51%	55%	55%
<b>Age</b>						
Up to 24 years	18%	20%	14%	24%	15%	10%
25 – 34 years	17%	19%	18%	19%	16%	18%
35 – 44 years	21%	22%	24%	19%	17%	21%
45 – 54 years	16%	17%	17%	16%	18%	20%
55 – 64 years	14%	12%	14%	11%	14%	15%
65 years and older	14%	9%	13%	11%	20%	16%
<b>Education</b>						
Low	19%	17%	18%	17%	23%	14%
Middle	39%	41%	33%	45%	36%	31%
High	42%	43%	49%	39%	41%	55%
<b>Household Income</b>						
Up to 1,219 euro	21%	22%	19%	17%	18%	18%
1,220 – 3,049 euro	59%	57%	57%	62%	62%	56%
3,050 euro and more	20%	21%	24%	21%	20%	25%

Source: Representative population survey (n =2,000) in France, IPK International 2007  
 Deviations from 100% due to rounding.

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway / High Interest					
	Total	Dog sledding tour	Whale watching	Hotel stay with activities	Hurtigruten	Northern Lights tour
<b>Size of Household</b>						
1 person	14%	13%	14%	12%	14%	16%
2 persons	30%	26%	30%	27%	34%	32%
3 persons and more	56%	61%	57%	61%	52%	52%
<b>Children in Household</b>						
Yes	38%	41%	38%	41%	33%	32%
None	62%	59%	62%	59%	67%	68%

Source: Representative population survey (n =2,000) in France, IPK International 2007  
 Deviations from 100% due to rounding.

- The socio-demographic profiles for the holiday types indicated above are primarily differentiated to the following extent:
  - Dog sledding: basically all age groups
  - Tour offers (whale watching, Hurtigruten, Northern Lights tour): more of interest for older age groups (25+ years) and of less interest to younger ones
  - Stationary holiday with winter activities: above-average interest for the youngest (up to 24 years)
- Moreover, the higher education levels and higher income groups show particular interest in whale watching and Northern Lights to an above-average frequency.

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the regional source markets:

Regions of origin	Winter Interest Potential Holidays in Northern Norway					
	Total	Dog sledding tour	Whale watching	Hotel stay with activities	Hurtigruten	Northern Lights tour
<b>Region</b>						
Ile de France	20%	21%	22%	21%	19%	25%
BP East	8%	9%	7%	8%	8%	8%
BP West	8%	8%	8%	9%	9%	11%
North	6%	6%	3%	6%	6%	3%
East	9%	8%	8%	10%	8%	6%
West	14%	13%	14%	12%	13%	13%
South West	12%	15%	16%	14%	12%	15%
South East	13%	12%	12%	10%	13%	11%
Mediterranean	12%	10%	10%	10%	11%	9%
<b>Size of Town of Residence</b>						
Up to 1,999 inhabitants	24%	24%	23%	24%	25%	25%
2,000 – 19,999 inhabitants	16%	16%	15%	15%	14%	10%
20,000 – 100,000 inhabitants	13%	14%	17%	21%	14%	15%
100,000 inhabitants and more	28%	28%	26%	21%	29%	26%
Paris	18%	19%	20%	19%	18%	24%

Source: Representative population survey (n =2,000) in France, IPK International 2007  
Deviations from 100% due to rounding.





- No special preference is seen for any one specific type of holiday based on regional source market.

### 4.3. Price Acceptance by Type of Holiday

Differentiating the price acceptance of the winter holiday interest potential by holiday types reveals the following:

Prices	Winter Interest Potential Holidays in Northern Norway / High Interest					
	Total	Dog sledding tour	Whale watching	Hotel stay with activities	Hurtigruten	Northern Lights tour
More than € 3,000	2%	3%	3%	3%	3%	2%
Up to € 3,000	4%	4%	5%	5%	5%	6%
Up to € 2,500	4%	5%	5%	5%	5%	6%
Up to € 2,000	12%	12%	14%	13%	13%	13%
Up to € 1,500	20%	20%	22%	19%	22%	24%
Up to € 1,000	31%	34%	33%	34%	32%	33%
Up to € 500	15%	13%	11%	14%	14%	10%
Less than € 500	7%	6%	5%	4%	4%	5%
Don't know	4%	3%	2%	3%	2%	3%

Source: Representative population survey (n =2,000) in France, IPK International 2007  
 Deviations from 100% due to rounding.

- Irrespective of the individual holiday interests, the price acceptance for a one-week winter holiday in Northern Norway generally lies between 1,000 and 1,500 euro.

## 5. Summary: French Market

Summarizing the most important findings of the population survey reveals the following:

- 69% of the French show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger and middle age groups (up to 54 years)
  - middle and upper social classes (education levels and income brackets)
- The interest in winter holiday possibilities in Northern Norway is essentially nationwide.
- The following winter offers for Northern Norway attract the largest interest in the French market:
  - Dog sledding tours
  - Winter whale watching / “Killer Whale Safari”
  - Hotel stays with northern winter activities
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Winter tour with Northern Lights experience
- The least interest is noted for:
  - Deep Sea rafting
  - “King Crab Safari”



- The price acceptance for winter holidays in Northern Norway is generally between 1,000 and 1,500 euro (regardless of holiday type).

## D. ITALY

## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in Italy during April 2007.

A total of  $n = 1,997$  Italians were surveyed nationwide.

The interviews were conducted face-to-face (CATI method = Computer Aided Telephone Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

## 1. Total Interest Potential for Winter Holidays in Northern Norway

### 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the Italians in total show a basic interest in the various winter holiday possibilities in Northern Norway as follows:

	<b>Italians in Total</b>
Interested in winter holiday possibilities in Northern Norway (total interest potential)	41%
Not interested in winter holidays in Northern Norway	59%
Italian population (as of 15 years) in total	100%

Source: Representative population survey (n = 1,997) in Italy, IPK International 2007

- When asked about the types of winter holidays or activities they would consider for a winter holiday in Northern Norway, 41% of the Italians showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In contrast, 59% of the Italians did not show any interest in winter holiday possibilities in Northern Norway.
- In other words: 41% of the Italians feel generally inclined toward some of the various winter holiday possibilities in Northern Norway and thus represent the maximum Italian interest potential for winter holidays in Northern Norway.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The Italians expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	Italian population (15+ years)	Index
<b>Gender</b>			
Male	48%	48%	100
Female	52%	52%	100
<b>Age</b>			
Up to 24 years	16%	10%	160
25 – 34 years	24%	19%	126
35 – 44 years	23%	18%	128
45 – 54 years	16%	16%	100
55 – 64 years	11%	14%	79
65 years and older	10%	22%	45
<b>Education</b>			
Low	7%	14%	50
Middle	72%	67%	107
High	21%	18%	117
<b>Social Class</b>			
Lower	15%	20%	75
Middle	66%	63%	105
Upper	19%	17%	112

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
Deviations from 100% due to rounding.



	Total interest potential for winter holiday possibilities in Northern Norway	Italian population (15+ years)	Index
<b>Household size</b>			
1 person	9%	13%	69
2 persons	18%	25%	72
3 persons or more	72%	61%	118
<b>Children in Household</b>			
Yes	29%	24%	121
None	71%	76%	93

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
 Deviations from 100% due to rounding.

Italians who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- both men and women
- primarily younger and middle age groups up to 54 years of age
- middle and higher education levels
- middle and upper social classes
- most living in multi-person households
- roughly every third having children in their households

Compared to the total Italian population, the interest potential for a winter holiday in Northern Norway shows above all:

- higher shares of very younger age groups (up to 24 years of age)
- higher shares of upper social classes.

### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The Italians expressing an interest in winter holiday possibilities in Northern Norway live in the following regions:

	Total interest potential for winter holiday possibilities in Northern Norway	Italian population (15+ years)	Index
<b>Region</b>			
North West	26%	27%	96
North East	17%	19%	89
Central areas	22%	19%	116
South and islands	34%	35%	97
<b>Size of Town of Residence</b>			
Up to 9,999 inhabitants	32%	33%	97
10,000 – 29,999 inhabitants	22%	23%	96
30,000 – 99,999 inhabitants	22%	21%	105
100,000 – 250,000 inhabitants	8%	8%	100
More than 250,000 inhabitants	15%	16%	94

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
 Deviations from 100% due to rounding.

- In principle, the Italians interested in winter holiday possibilities in Northern Norway come from all parts of Italy.

- Compared to the Italian population in total, a slightly above-average interest is shown in the central area of Italy.
- As concerns the size of the city in which those interested live, a distribution similar to the overall population is seen. Thus,
  - about 30% of the interested live in rural regions,
  - about 45% live in small and mid-sized cities (under 100,000 residents),
  - and about 25% in large cities (more than 100,000 residents).



## 1.4. Internet Access among the Total Interest Potential for Winter Holidays in Northern Norway

Italians expressing an interest in winter holiday possibilities in Northern Norway have the following Internet access rates:

	Total interest potential for winter holiday possibilities in Northern Norway	Italian population (15+ years)	Index
Yes	73%	61%	120
No	27%	39%	69

Source: Representative population survey (n =1,997) in Italy, IPK International 2007

- About 75% of the Italians showing an interest in winter holiday possibilities in Northern Norway have Internet access.
- Compared to the total Italian population, Internet access is clearly higher among those Italians interested in a winter holiday in Northern Norway.
- Thus, a very high number of those interested can be addressed via the Internet.

## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the Italians responded as follows:

Type of Holiday	Italians in Total
Winter tour with Northern Lights experience	21%
Winter cruise along the Norwegian Coast / "Hurtigruten"	20%
Arctic "Art & Culture" tour	13%
Dog sledding tours	13%
Visiting "Santa Claus" in Northern Norway	11%
Winter whale watching / "Killer Whale Safari"	11%
Winter North Cape tour	10%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	10%
Experiencing Sami culture with reindeer driving	9%
Staying at an "ice hotel"	8%
Cross-country skiing holiday in Northern Norway	8%
Alpine skiing holiday in Northern Norway	6%
Winter deep sea fishing, organized, with a guide	5%
Winter deep sea rafting (in large rubber dinghies)	2%
Winter big crab fishing / "King Crab Safari"	2%
Not interested in winter holidays in Northern Norway	59%

Source: Representative population survey (n = 1,997) in Italy, IPK International 2007  
Multiple answers possible.

- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited four to five holiday types.
- The following winter offers for Northern Norway attract the largest interest in the Italian market:
  - Winter tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”

21% of the Italians would enjoy the Northern Lights experience and a Hurtigruten cruise attracts another 20%.

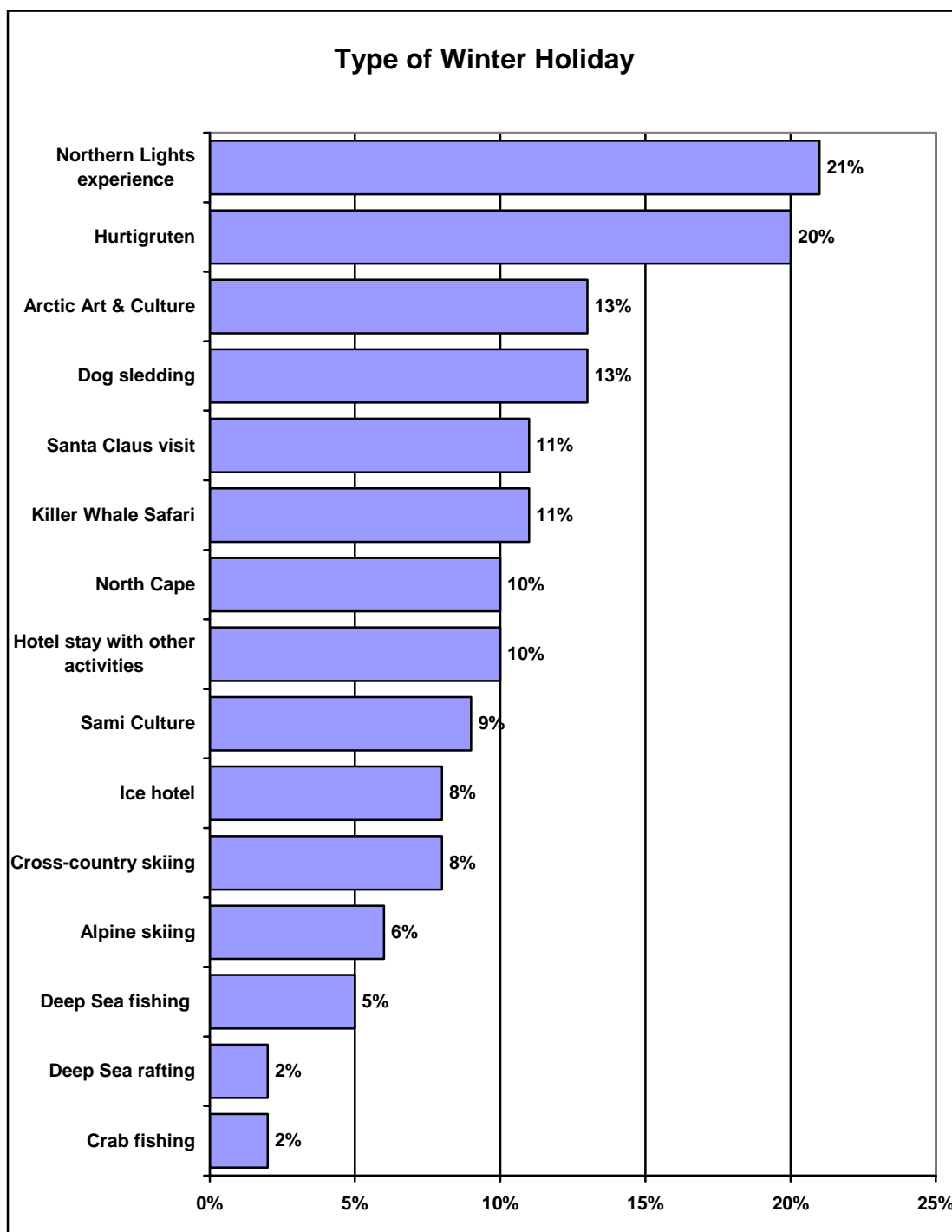
- Apart from these two offers attracting the most interest, there is also a certain interest shown for offers such as:
  - Dog sledding tours
  - Arctic “Art & Culture” tour
  - Visiting “Santa Claus”
  - Winter whale watching / “Killer Whale Safari”
  - North Cape tour
  - Experiencing Sami culture with reindeer driving
  - Staying at a hotel offering various winter activities
  - Staying at an “ice hotel”
  - Cross-country skiing holiday

Each of these holiday types appeal to 8 – 13% of the Italians.

- The least interest on the Italian market is shown for offers such as:
  - Deep Sea rafting (2%)
  - “King Crab Safari” (2%)
- Thus, the Italian interest in a winter holiday in Northern Norway should primarily be addressed via
  - Tours with Northern Lights experienceas well as
  - Cruises along the Norwegian Coast / “Hurtigruten”

About 75% of the Italians having an interest in winter holiday possibilities in Northern Norway can be addressed via these two holiday types.

- In comparison thereto, there is significantly lower interest shown for the remaining winter holiday possibilities. In order to optimally address its target group and thus best exploit its potential, Northern Norway should concentrate on marketing these main products to the Italian market.
- All the other products / activities, garnering lesser interest, should be viewed more as product enhancement during the course of developing the main products.
- The Italian market shows hardly any interest in a “Deep Sea” experience or winter crab fishing in Northern Norway.



Source: Representative population survey (n = 1,997) in Italy, IPK International 2007  
 Multiple answers possible.



### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the Italians expressing interest in winter holiday possibilities in Northern Norway responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	Italians interested in winter holiday possibilities in Northern Norway
More than €3,000	4%
Up to €3,000	9%
Up to €2,500	7%
Up to €2,000	16%
Up to €1,500	17%
Up to €1,000	25%
Up to €500	11%
Less than €500	12%

Source: Representative population survey (n = 1,997) in Italy, IPK International 2007

- 25% of the Italians expressing interest in winter holiday possibilities in Northern Norway would be willing to spend up to 1,000 euro for a one-week winter holiday in Northern Norway, including all additional travel costs.
- 17% would be willing to spend up to 1,500 euro and 16% up to 2,000 euro.



- 20% would be willing to spend more than 2,000 euro for a one-week winter holiday in Northern Norway.
- 23% of the Italians expressing interest in winter holiday possibilities in Northern Norway are not willing to pay more than 500 euro for a one-week winter holiday in Northern Norway.

## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Arctic Art & Culture	Dog sledding tour	Santa Claus visit	Whale watching
<b>Gender</b>							
Male	48%	44%	41%	40%	45%	40%	46%
Female	52%	56%	59%	60%	55%	60%	54%
<b>Age</b>							
Up to 24 years	16%	17%	15%	16%	19%	17%	18%
25 – 34 years	24%	25%	25%	23%	25%	25%	28%
35 – 44 years	23%	24%	23%	21%	24%	25%	26%
45 – 54 years	16%	16%	18%	19%	17%	16%	13%
55 – 64 years	11%	11%	10%	12%	10%	12%	9%
65 years and older	10%	7%	9%	9%	4%	6%	6%
<b>Education</b>							
Low	7%	5%	7%	5%	3%	4%	3%
Middle	72%	73%	74%	71%	77%	76%	78%
High	21%	23%	19%	24%	20%	20%	19%
<b>Social Class</b>							
Lower	15%	13%	14%	15%	14%	17%	11%
Middle	66%	68%	67%	66%	69%	67%	71%
Upper	19%	18%	18%	19%	17%	16%	18%

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
 Deviations from 100% due to rounding.

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Arctic Art & Culture	Dog sledding tour	Santa Claus visit	Whale watching
<b>Size of Household</b>							
1 person	9%	7%	7%	8%	7%	7%	8%
2 persons	18%	16%	21%	18%	14%	17%	18%
3 persons and more	72%	76%	72%	75%	79%	76%	74%
<b>Children in Household</b>							
Yes	29%	28%	31%	28%	29%	32%	31%
None	71%	72%	69%	72%	71%	68%	69%

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
 Deviations from 100% due to rounding.

- The socio-demographic profiles for the holiday types indicated above do not differ substantially from one another, although Sightseeing (Tours) is the strongest segment in the Italian market for winter holidays in Northern Norway. In general, these tour products have a somewhat stronger appeal for women than men.

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the regional source markets:

Regions of origin	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Arctic Art & Culture	Dog sledding tour	Santa Claus visit	Whale watching
<b>Region</b>							
North West	26%	27%	26%	31%	29%	28%	31%
North East	17%	15%	17%	13%	18%	12%	13%
Central areas	22%	26%	23%	23%	23%	24%	22%
South and islands	34%	32%	33%	33%	30%	35%	34%
<b>Size of Town of Residence</b>							
Up to 9,999 inhabitants	32%	31%	33%	30%	27%	31%	33%
10,000 – 29,999 inhabitants	22%	20%	20%	21%	24%	21%	21%
30,000 – 99,999 inhabitants	22%	25%	22%	28%	26%	25%	24%
100,000 – 250,000 inhabitants	8%	7%	7%	6%	6%	8%	6%
More than 250,000 inhabitants	15%	17%	17%	14%	17%	15%	16%

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
Deviations from 100% due to rounding.

- No special preference is shown for any one specific holiday type based on regional source market, although Arctic Art & Culture, dog sledding, Santa Claus and whale watching does tend to be somewhat higher in the North West region.

### 4.3. Price Acceptance by Type of Holiday

Differentiating the price acceptance of the winter holiday interest potential by type of holiday reveals the following:

Price	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Hurtigruten	Arctic Art & Culture	Dog sledding tour	Santa Claus visit	Whale watching
More than € 3,000	4%	3%	4%	3%	4%	1%	3%
Up to € 3,000	9%	10%	9%	12%	8%	9%	12%
Up to € 2,500	7%	8%	8%	8%	9%	6%	7%
Up to € 2,000	16%	18%	17%	20%	20%	20%	18%
Up to € 1,500	17%	17%	17%	17%	18%	18%	19%
Up to € 1,000	25%	24%	26%	23%	26%	25%	23%
Up to € 500	11%	10%	9%	7%	7%	10%	9%
Less than € 500	12%	10%	9%	10%	8%	11%	9%

Source: Representative population survey (n =1,997) in Italy, IPK International 2007  
 Deviations from 100% due to rounding.

- Irrespective of specific holiday interests, price acceptance for a one-week winter holiday in Northern Norway generally lies between 1,000 and 2,000 euro with a strong emphasis on up to 1,000 euro.

## 5. Summary: Italian Market

Summarizing the most important findings of the population survey reveals the following:

- 41% of the Italians show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger and middle age groups (up to 54 years)
  - middle and upper social classes (education levels)
- There is in principle a nationwide interest in winter holiday possibilities in Northern Norway.
- By far the greatest interest shown in the Italian market is for:
  - Winter tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
- The least interest is shown for:
  - Deep Sea rafting
  - “King Crab Safari”
- Generally speaking, price acceptance for winter holidays in Northern Norway is between 1,000 and 2,000 euro, yet the main prevailing price range should be closer to 1,000 euro than to 1,500 euro.



## **E. THE NETHERLANDS**



## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in The Netherlands during April 2007.

A total of  $n = 2,000$  Dutch were surveyed nationwide.

The interviews were conducted online (CAWI method = Computer Aided Web Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

## 1. Total Interest Potential for Winter Holidays in Northern Norway

### 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the Dutch in total show a basic interest in the various winter holiday possibilities in Northern Norway as follows:

	<b>Dutch in Total</b>
Interested in winter holiday possibilities in Northern Norway (total interest potential)	47%
Not interested in winter holidays in Northern Norway	53%
Dutch population (15-69 years) in total	100%

Source: Representative population survey (n = 2,000) in The Netherlands, IPK International 2007

- When asked about the types of winter holidays or activities they would consider for a winter holiday in Northern Norway, 47% of the Dutch showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In contrast, 53% of the Dutch did not show any interest in winter holiday possibilities in Northern Norway.
- In other words: 47% of the Dutch feel generally inclined toward some of the various winter holiday possibilities in Northern Norway and thus represent the maximum Dutch interest potential for winter holidays in Northern Norway.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The Dutch expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	Dutch population (15-69 years)	Index
<b>Gender</b>			
Male	46%	50%	92
Female	54%	50%	108
<b>Age</b>			
Up to 24 years	20%	13%	154
25 – 34 years	21%	16%	131
35 – 44 years	21%	19%	111
45 – 54 years	20%	22%	91
55 – 69 years	18%	30%	60
<b>Education</b>			
Low	6%	9%	67
Middle	30%	35%	86
High	64%	56%	114
<b>Household Income</b>			
Low	23%	21%	110
Middle	55%	58%	95
Upper	22%	21%	105
<b>Household size</b>			
1 person	24%	21%	114
2 persons	31%	38%	82
3 persons or more	45%	41%	110
<b>Children in Household</b>			
Yes	33%	31%	106
No	67%	69%	97

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
Deviations from 100% due to rounding.



The Dutch who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- slightly more women than men
- primarily younger and middle age groups (up to 54 years of age)
- middle and higher education levels
- middle and higher income groups
- most living in multi-person households
- every third having children in their households

Compared to the total Dutch population, the interest potential for winter holiday possibilities in Northern Norway shows above all:

- higher shares of younger age groups (up to 34 years of age)
- higher shares of higher education levels

### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The Dutch expressing an interest in a winter holiday in Northern Norway live in the following regions:

	Total interest potential for a winter holiday in Northern Norway	Dutch population (15-69 years)	Index
Big cities (Amsterdam, Rotterdam, The Hague)	15%	15%	100
Other West Holland	28%	30%	93
North Holland	8%	9%	89
East Holland	24%	23%	104
South Holland	24%	24%	100

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
Deviations from 100% due to rounding.

- In principle, the Dutch interested in winter holidays in Northern Norway come from all parts of the country.
- Thus, the most important regional focus markets for winter holidays in Northern Norway are the most populated areas in the Netherlands:
  - West Holland with its three big cities of Amsterdam, Rotterdam, The Hague (43%)
  - East Holland (24%)
 and
  - South Holland (24%)



## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the Dutch responded as follows:

Type of Holiday	Dutch in Total
Winter tour with Northern Lights experience	28%
Winter whale watching / "Killer Whale Safari"	22%
Staying at an "ice hotel"	17%
Dog sledding tours	17%
Winter North Cape tour	17%
Winter cruise along the Norwegian Coast / "Hurtigruten"	17%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	16%
Experiencing Sami culture with reindeer driving	12%
Visiting "Santa Claus" in Northern Norway	12%
Alpine skiing holiday in Northern Norway	11%
Arctic "Art & Culture" tour	8%
Cross-country skiing holiday in Northern Norway	6%
Winter deep sea fishing, organized, with a guide	4%
Winter deep sea rafting (in large rubber dinghies)	4%
Winter big crab fishing / "King Crab Safari"	3%
Not interested in winter holidays in Northern Norway	53%

Source: Representative population survey (n = 2,000) in The Netherlands, IPK International 2007  
Multiple answers possible.

- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited about four holiday types.

- By far most Dutch decided in favor of a:
  - Winter tour with Northern Lights experience

28% of the Dutch would find such a wintertime holiday in Northern Norway appealing.

- Second in the list of preferred winter holiday possibilities is:
  - Winter whale watching / “Killer Whale Safari”

This wintertime holiday in Northern Norway would appeal to 22% of the Dutch.

- There is also an interest shown for offers such as:
  - Staying at an “ice hotel”
  - Dog sledding tours
  - North Cape tour
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Staying at a hotel offering various winter activities

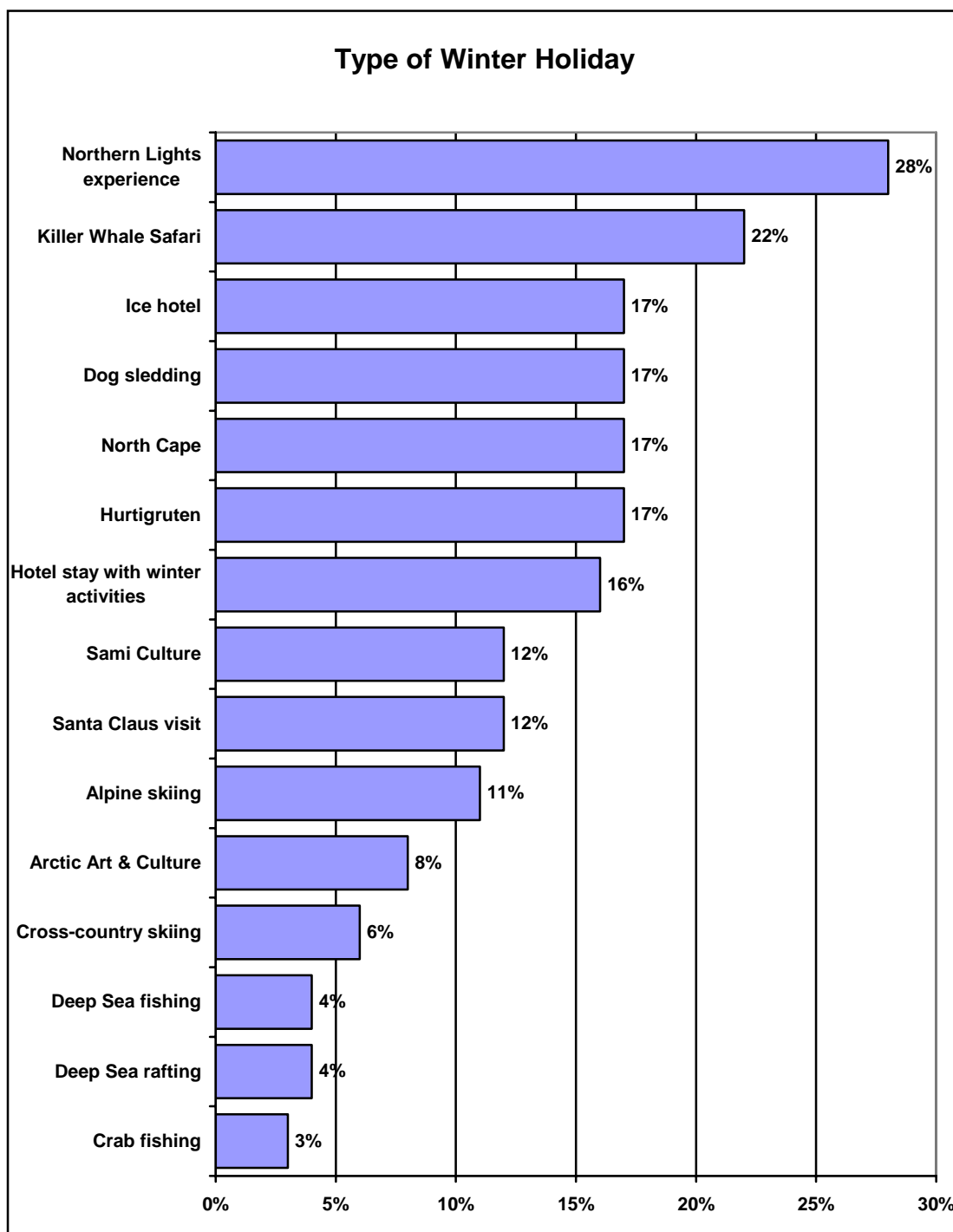
Each of these holiday types appeals to 16–17% of the Dutch.



- In comparison thereto, the other holiday possibilities attract much lower interest. About 8-12% of the Dutch show an interest in each case for:
  - Experiencing Sami culture with reindeer driving
  - Visiting “Santa Claus”
  - Alpine skiing holiday
  - Arctic “Art & Culture” tour
- The Dutch showed the lowest interest for:
  - Deep Sea fishing or Deep Sea rafting in winter (4% each)
  - “King Crab Safari” (2%)
- Thus, the Dutch interest in a winter holiday in Northern Norway should primarily be addressed via
  - Northern Lights experience
  - “Killer Whale Safari”

About 75% of the Dutch interested in winter holiday possibilities in Northern Norway can be addressed via these two holiday types.

- In addition, further segments for the Dutch market are:
  - Cruises along the Norwegian Coast / “Hurtigruten”
 as well as
  - Stationary stays (including “ice hotel”) with dog sledding tours / excursions, snow-scooters, etc.
- The North Cape in winter should primarily be marketed in conjunction with the “Northern Lights experience” and less as a product of its own.
- There is hardly any Dutch market interest in a “Deep Sea” experience or crab fishing in Northern Norway.



Source: Representative population survey (n = 2,000) in The Netherlands, IPK International 2007  
Multiple answers possible.

### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the Dutch expressing interest in winter holiday possibilities in Northern Norway responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	Dutch interested in winter holiday possibilities in Northern Norway
More than € 3,000	1%
Up to € 3,000	3%
Up to € 2,500	5%
Up to € 2,000	17%
Up to € 1,500	32%
Up to € 1,000	35%
€ 500 or less	8%

Source: Representative population survey (n = 2,000) in The Netherlands, IPK International 2007

- Most of the Dutch interested in winter holiday possibilities (67%) would be willing to spend between 1,000 and 1,500 euro for a one-week winter holiday in Northern Norway, including all additional travel costs.



- 17% would be willing to spend up to 2,000 euro and 9% would be willing to spend more than 2,000 euro for a one-week winter holiday in Northern Norway.
- Regarding the youngest age group (up to 24 years) and price acceptance, the following can be noted: only every second person in this age group is willing to spend more than 1,000 euro for a winter holiday in Northern Norway.

## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Whale watching	Staying ice hotel	Dog sledding tour	North Cape tour	Hurtigruten
<b>Gender</b>							
Male	46%	44%	46%	46%	41%	52%	45%
Female	54%	56%	54%	54%	59%	48%	55%
<b>Age</b>							
Up to 24 years	20%	20%	25%	28%	26%	22%	22%
25 – 34 years	21%	22%	24%	26%	24%	23%	21%
35 – 44 years	21%	20%	22%	22%	24%	19%	20%
45 – 54 years	20%	19%	16%	16%	15%	19%	19%
55 – 69 years	18%	18%	13%	8%	12%	18%	19%
<b>Education</b>							
Low	6%	4%	5%	4%	5%	4%	4%
Middle	30%	28%	27%	21%	25%	27%	30%
High	64%	67%	68%	74%	70%	69%	66%
<b>Household Income</b>							
Low	23%	24%	25%	28%	24%	22%	24%
Middle	55%	53%	54%	53%	55%	58%	53%
Upper	22%	24%	21%	19%	21%	21%	24%

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
Deviations from 100% due to rounding

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Whale watching	Staying ice hotel	Dog sledding tour	North Cape tour	Hurtigruten
<b>Size of Household</b>							
1 person	24%	25%	25%	29%	26%	28%	25%
2 persons	31%	32%	30%	28%	29%	31%	33%
3 persons and more	45%	43%	45%	44%	45%	41%	42%
<b>Children in Household</b>							
Yes	33%	32%	31%	29%	32%	29%	29%
None	67%	68%	69%	71%	68%	71%	71%

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
 Deviations from 100% due to rounding.

- The socio-demographic profiles for the holiday types indicated above are primarily differentiated to the following extent:
  - Northern Lights, Hurtigruten cruises and North Cape tours basically appeal to all age groups.
  - Whale watching, dog sledding and staying in an ice hotel are more appealing to younger ones (up to 44 years).
  - No significant differences are shown relative education, income or families with children.

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by type of holiday reveals the following with respect to the regional source markets:

Region	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Whale watching	Staying ice hotel	Dog sledding tour	North Cape tour	Hurtigruten
Big cities (Amsterdam, Rotterdam, The Hague)	15%	15%	16%	19%	16%	14%	19%
Rest West Holland	28%	28%	29%	29%	28%	27%	25%
North Holland	8%	8%	7%	6%	7%	10%	8%
East Holland	24%	24%	25%	23%	25%	25%	26%
South Holland	24%	24%	22%	24%	24%	24%	23%

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
Deviations from 100% due to rounding.

- There is no special or above-average preference seen for any one type of holiday based on specific regional source market.

### 4.3. Price Acceptance by Type of Holiday

Differentiating price acceptance for the winter holiday interest potential by type of holiday reveals the following:

Prices	Winter Interest Potential Holidays in Northern Norway						
	Total	Northern Lights tour	Whale watching	Staying ice hotel	Dog sledding tour	North Cape tour	Hurtigruten
More than €3,000	1%	1%	1%	*	1%	1%	1%
Up to €3,000	3%	3%	3%	3%	2%	3%	3%
Up to €2,500	5%	5%	5%	6%	5%	6%	6%
Up to €2,000	17%	18%	17%	17%	17%	20%	21%
Up to €1,500	32%	34%	34%	35%	34%	36%	34%
Up to €1,000	35%	35%	33%	32%	35%	30%	32%
€500 or less	8%	5%	7%	7%	5%	4%	5%

Source: Representative population survey (n =2,000) in The Netherlands, IPK International 2007  
 Deviations from 100% due to rounding. \* = less than 0.5%

- Largely independent of individual holiday interests, price acceptance is basically between 1,000 and 1,500 euro for an one-week winter holiday in Northern Norway.



## 5. Summary: Dutch Market

Summarizing the most important findings of the population survey reveals the following:

- 47% of the Dutch show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger and middle age groups (up to 54 years)
  - middle and upper social classes (education levels and income brackets)
- There is in principle a nationwide interest in winter holiday possibilities in Northern Norway.
- The following winter offers for Northern Norway attract the largest interest in the Dutch market:
  - Winter tour with Northern Lights experience
  - Winter whale watching / “Killer Whale Safari”
- Interest also exists for:
  - Staying at an ice hotel
  - Dog sledding tours
  - North Cape tour
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Staying in a hotel offering various winter activities



- The least interest is expressed for:
  - Deep Sea fishing or Deep Sea rafting
  - “King Crab Safari”
  
- The price acceptance for winter holidays in Northern Norway is between 1,000 and 1,500 euro (regardless of type of holiday).



## F. SPAIN



## Introduction

The study findings presented in the following are based on a representative population survey which was conducted in Spain during April 2007.

A total of  $n = 2,065$  Spanish were surveyed nationwide.

The interviews were conducted face-to-face (CAPI method = Computer Aided Personal Interviewing).

Further detailed tables, the questionnaire and a description of the methodology can be found in the annex.

## 1. Total Interest Potential for Winter Holidays in Northern Norway

### 1.1. Total Interest Potential for Winter Holidays in Northern Norway

When asked which types of winter holidays would be of interest in Northern Norway, the Spanish in total showed a basic interest in various winter holiday possibilities in Northern Norway as follows:

	<b>Spanish in Total</b>
Interested in winter holiday possibilities in Northern Norway (total interest potential)	33%
Not interested in winter holidays in Northern Norway	67%
Spanish population (as of 15 years) in total	100%

Source: Representative population survey (n = 2,065) in Spain, IPK International 2007

- When asked about the type of winter holiday or activity they would consider for a winter holiday in Northern Norway, 33% of the Spanish showed a spontaneous interest in some of the various winter holidays / activities in Northern Norway.
- In contrast, 67% of the Spanish did not show any interest in winter holiday possibilities in Northern Norway.
- In other words: 33% of the Spanish feel generally inclined toward some of the various winter holiday possibilities in Northern Norway and thus represent the maximum Spanish interest potential for winter holidays in Northern Norway.

## 1.2. Socio-demographic Characteristics of the Total Interest Potential for Winter Holidays in Northern Norway

The Spanish expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

	Total interest potential for winter holiday possibilities in Northern Norway	Spanish population (15+ years)	Index
<b>Gender</b>			
Male	53%	49%	108
Female	47%	51%	92
<b>Age</b>			
Up to 24 years	23%	15%	153
25 – 34 years	27%	20%	135
35 – 44 years	23%	19%	121
45 – 54 years	11%	13%	85
55 – 64 years	11%	13%	85
65 years and older	6%	20%	30
<b>Education</b>			
Low	10%	28%	36
Middle	71%	59%	120
High	19%	14%	136
<b>Household Income</b>			
Up to 962 euro	32%	37%	86
963 – 1,502 euro	40%	38%	105
1,503 euro and more	28%	25%	112
<b>Social Class</b>			
Lower / Lower middle	24%	38%	63
Middle	50%	40%	125
Upper / Upper middle	27%	22%	123

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
Deviations from 100% due to rounding.

	Total interest potential for winter holiday possibilities in Northern Norway	Spanish population (15+ years)	Index
<b>Household size</b>			
1 person	21%	23%	91
2 persons	42%	42%	100
3 persons or more	36%	35%	103
<b>Children in Household</b>			
Yes	19%	17%	112
None	81%	83%	98

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
 Deviations from 100% due to rounding.

Those Spanish who are interested in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- slightly more men than women
- primarily younger age groups up to 44 years of age
- middle and higher education levels
- middle and higher income groups
- most living in multi-person households
- every fifth having children in their households

Compared to the total Spanish population, the interest potential for a winter holiday in Northern Norway shows above all:

- higher shares of younger age groups (up to 44 years of age)
- higher shares of middle and upper social classes.

### 1.3. Regional Source Markets of the Total Interest Potential for Winter Holidays in Northern Norway

The Spanish expressing an interest in winter holiday possibilities in Northern Norway live in the following regions:

	Total interest potential for winter holiday possibilities in Northern Norway	Spanish population (15+ years)	Index
<b>Regions</b>			
Northeast	19%	21%	90
East	20%	14%	143
South	13%	19%	68
Central	22%	22%	100
Northwest	10%	10%	100
North	9%	10%	90
Canaries	7%	4%	175
<b>Size of Town of Residence</b>			
Up to 10,000 inhabitants	20%	23%	87
10,000 – 49,999 inhabitants	24%	26%	92
50,000 – 199,999 inhabitants	26%	23%	113
200,000 – 500,000 inhabitants	12%	12%	100
More than 500,000 inhabitants	19%	17%	112

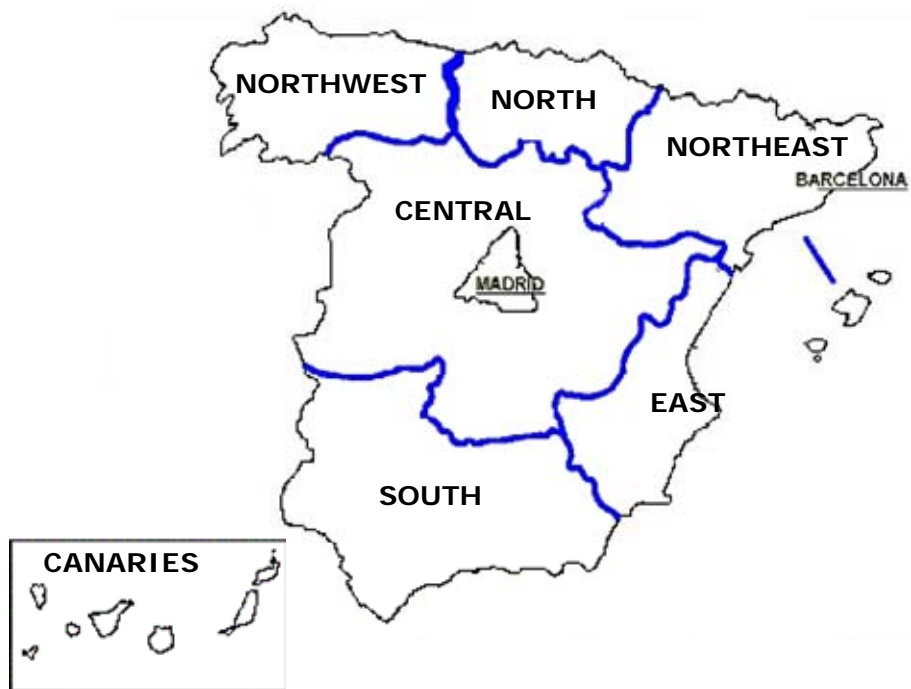
Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
 Deviations from 100% due to rounding.



- In principle, the Spanish interested in winter holiday possibilities in Northern Norway come from all over the country.
- Yet based on the population and the interest expressed, the most important regional focus markets for winter holidays in Northern Norway are:
  - Central Spain with the capital Madrid (22%)
  - Eastern Spain with the city of Barcelona (20%)
  - Northeast Spain (19%)

Roughly 60% of the Spanish expressing an interest in winter holiday possibilities in Northern Norway live in these areas.

- Compared to the total Spanish population, an above-average interest for winter holiday possibilities in Northern Norway can be noted in the East of Spain.
- As concerns the size of the city in which those interested are living, a distribution similar to the overall population is seen. Thus,
  - about 20% of the total potential live in rural regions,
  - about 50% live in small and mid-sized cities (under 200,000 residents),
  - and about 30% in large cities (more than 200,000 residents).



## 1.4. Internet Access among the Total Interest Potential for Winter Holidays in Northern Norway

Those Spanish expressing an interest in winter holiday possibilities in Northern Norway have the following Internet access rates:

	Total interest potential for winter holiday possibilities in Northern Norway	Spanish population (15+ years)	Index
Yes	48%	34%	141
No	52%	66%	79

Source: Representative population survey (n =2,065) in Spain, IPK International 2007

- About 50% of the Spanish showing an interest in winter holiday possibilities in Northern Norway have Internet access.
- Compared to the total Spanish population, Internet access is clearly higher among those Spanish interested in a winter holiday in Northern Norway.
- Despite a clearly higher Internet access rate among the total interest potential, only every second interested person can be approached via Internet in the Spanish market.

## 2. Interest Potential for Special Winter Holiday Types / Activities in Northern Norway

When asked which special type of winter holiday / specific holiday activities would be of interest, the Spanish responded as follows:

Type of Holiday	Spanish in Total
Winter cruise along the Norwegian Coast / "Hurtigruten"	16%
Dog sledding tours	9%
Alpine skiing holiday in Northern Norway	9%
Winter North Cape tour	8%
Staying at a hotel offering various winter activities such as ice fishing, snow-scooter tours/dog sledding tours, etc.	8%
Winter whale watching / "Killer Whale Safari"	7%
Staying at an "ice hotel"	6%
Winter tour with Northern Lights experience	5%
Experiencing Sami culture with reindeer driving	5%
Winter deep sea rafting (in large rubber dinghies)	5%
Cross-country skiing holiday in Northern Norway	5%
Arctic "Art & Culture" tour	5%
Visiting "Santa Claus" in Northern Norway	4%
Winter deep sea fishing, organized, with a guide	4%
Winter big crab fishing / "King Crab Safari"	4%
Not interested in winter holidays in Northern Norway	67%

Source: Representative population survey (n = 2,065) in Spain, IPK International 2007  
Multiple answers possible.

- When asked about the preferred type of winter holiday in Northern Norway or preferred holiday activities respectively, the interviewees could cite several different holiday types or activities. On average, each respondent cited three holiday types.
- The by far largest interest for the Spanish lies in:
  - Winter cruises along the Norwegian Coast / “Hurtigruten”

16% of the Spanish would find such a wintertime cruise in Northern Norway appealing.
- Interest is clearly lower for all the other types of winter holidays:

7–9% of the Spanish in each case show an interest in one of the following holiday types:

  - Dog sledding tours
  - Alpine skiing holiday
  - North Cape tour
  - Staying at a hotel offering various winter activities
  - Winter whale watching / “Killer whale Safari”

4-6% of the Spanish in each case show an interest in:

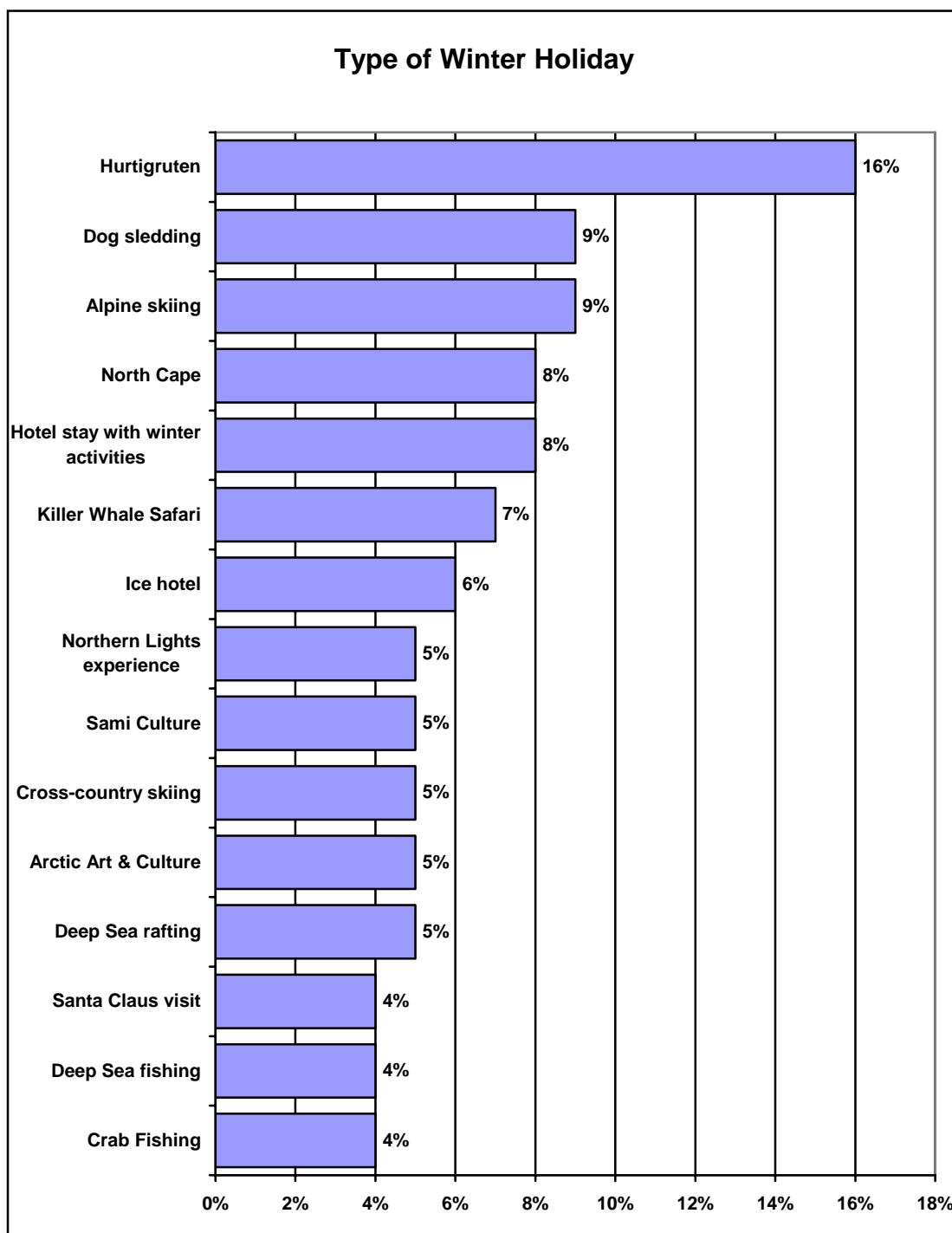
  - Staying at an “ice hotel”
  - Winter tour with Northern Lights experience
  - Experiencing Sami culture with reindeer driving
  - Cross-country skiing holiday
  - Arctic “Art & Culture” tour
  - Deep Sea fishing / rafting
  - Visiting “Santa Claus”
  - “King Crab Safari”



- Thus, the Spanish interest in a winter holiday in Northern Norway should primarily be addressed via
  - Cruises along the Norwegian Coast / “Hurtigruten”

Roughly every second interested person of the total Northern Norway winter potential can be addressed via a Hurtigruten cruise.

- A second interest group (yet clearly smaller) focuses on the traditional winter activities such as dog sledding, alpine skiing (less so cross country-skiing) – activities generally offered as stationary stays.
- All the other types of winter holidays / activities should not be the focus of the winter offer for Northern Norway. This also includes offers emphasizing a “Northern Lights experience,” as this holds comparable lower interest for the Spaniards.



Source: Representative population survey (n = 2,065) in Spain, IPK International 2007  
Multiple answers possible.

### 3. Price Acceptance for a Winter Holiday in Northern Norway

When asked, “What would be the maximum amount (including flight, accommodation, meals, activities, etc.) that you would spend in total per person for one week for such a holiday?”, the Spanish expressing interest in winter holiday possibilities in Northern Norway responded as follows:

Maximum amount to spend for a winter holiday in Northern Norway	Spanish interested in winter holiday possibilities in Northern Norway
More than €3,000	6%
Up to €3,000	13%
Up to €2,500	7%
Up to €2,000	16%
Up to €1,500	20%
Up to €1,000	24%
Up to €500	9%
Less than €500	4%

Source: Representative population survey (n = 2,065) in Spain, IPK International 2007

- Most of the Spanish interested in winter holiday possibilities (44%) would be willing to spend between 1,000 and 1,500 euro for a one-week winter holiday in Northern Norway, including all additional travel costs.
- 16% would be willing to spend up to 2,000 euro and 26% would be willing to spend more than 2,000 euro for a one-week winter holiday in Northern Norway.



## 4. Target Group Characteristics by Type of Holiday

### 4.1. Socio-demographic Profile by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the socio-demographic profile:

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Hurtigruten	Dog sledding tour	Alpine skiing	North Cape tour	Hotel + activities	Whale Safari
<b>Gender</b>							
Male	53%	50%	62%	66%	51%	56%	61%
Female	47%	50%	38%	34%	49%	44%	39%
<b>Age</b>							
Up to 24 years	23%	20%	25%	30%	16%	25%	23%
25 – 34 years	27%	27%	29%	31%	28%	28%	26%
35 – 44 years	23%	25%	21%	26%	27%	20%	28%
45 – 54 years	11%	11%	8%	6%	11%	8%	10%
50 – 64 years	11%	12%	14%	3%	9%	11%	8%
65 years and older	6%	5%	3%	4%	9%	9%	4%
<b>Education</b>							
Low	10%	10%	5%	5%	9%	12%	10%
Middle	71%	68%	77%	83%	70%	75%	66%
High	19%	22%	18%	12%	21%	13%	24%
<b>Household Income</b>							
Up to 962 euro	32%	31%	34%	50%	37%	35%	38%
963 – 1,502 euro	40%	37%	38%	26%	36%	26%	34%
1,503 euro and more	28%	32%	28%	24%	27%	39%	28%

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
Deviations from 100% due to rounding

Socio-demographic Characteristics	Winter Interest Potential Holidays in Northern Norway						
	Total	Hurtig-ruten	Dog sledding tour	Alpine skiing	North Cape tour	Hotel + activities	Whale Safari
<b>Social Class</b>							
Lower / Lower middle	24%	21%	19%	24%	26%	31%	22%
Middle	50%	48%	54%	53%	46%	42%	49%
Upper / Upper middle	27%	30%	27%	23%	28%	27%	29%
<b>Size of Household</b>							
1 person	21%	21%	23%	26%	25%	21%	18%
2 persons	42%	41%	41%	36%	43%	33%	39%
3 persons and more	36%	38%	36%	38%	31%	46%	43%
<b>Children in Household</b>							
Yes	19%	21%	20%	19%	17%	23%	19%
None	81%	79%	80%	81%	83%	77%	81%

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
 Deviations from 100% due to rounding.

- The socio-demographic profiles for the holiday types indicated above are primarily differentiated to the following extent:
  - The interest shown for Hurtigruten cruises represents a cross-section of the total potential. This product appeals to a broad target group.
  - Dog sledding: more men, tending to be somewhat younger, of the middle class to a relatively more frequent degree.
  - Alpine skiing: predominately men, young (up to 34 years old), higher middle class share, above-average share of singles.
  - North Cape tour: somewhat more of the middle age groups (35-44 years), of less interest to the younger ones, above-average share of singles.



- Active holiday: somewhat younger, more frequently multi-person households.
- Whale watching: more men, above-average share of middle age groups (35-44 years).
- There are virtually no differences as to “families with children” versus those without among the individual types of holidays.

## 4.2. Regional Source Markets by Type of Holiday

Differentiating the winter holiday interest potential by holiday types reveals the following with respect to the regional source markets:

Regions of origin	Winter Interest Potential Holidays in Northern Norway						
	Total	Hurtig-ruten	Dog sledding tour	Alpine skiing	North Cape tour	Hotel + activities	Whale Safari
<b>Region</b>							
Northeast	19%	21%	16%	21%	29%	27%	16%
East	20%	21%	21%	30%	21%	24%	31%
South	13%	13%	10%	9%	14%	10%	9%
Central	22%	18%	21%	17%	18%	11%	15%
Northwest	10%	10%	13%	12%	6%	11%	8%
North	9%	9%	13%	5%	11%	10%	12%
Canaries	7%	8%	7%	6%	2%	7%	10%
<b>Size of Town of Residence</b>							
Up to 10,000 inhabitants	20%	20%	25%	19%	15%	24%	26%
10,000 – 49,999 inhabitants	24%	27%	29%	28%	27%	32%	29%
50,000 – 199,999 inhabitants	26%	27%	21%	22%	33%	21%	17%
200,000 – 500,000 inhabitants	12%	11%	13%	12%	10%	10%	17%
More than 500,000 inhabitants	19%	15%	13%	19%	15%	13%	11%

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
Deviations from 100% due to rounding.



- In terms of regional source markets, it can be seen that the Northeast, East and Central regions are the main source markets for all the types of holidays specified. Differences are noted as far as:
  - Hurtigruten cruises: tends to be more from the Northeast and East
  - Dog sledding: tends to be more East and Central
  - Alpine skiing: above-average East
  - North Cape tour: above-average Northeast
  - Active holidays: Northeast and East, less Central
  - Whale watching: above-average East

### 4.3. Price Acceptance by Type of Holiday

Differentiating the price acceptance of the winter holiday interest potential by holiday types reveals the following:

Prices	Winter Interest Potential Holidays in Northern Norway						
	Total	Hurtig-ruten	Dog sledding tour	Alpine skiing	North Cape tour	Hotel + activities	Whale Safari
More than € 3,000	6%	6%	6%	5%	8%	7%	7%
Up to € 3,000	13%	12%	16%	16%	12%	13%	8%
Up to € 2,500	7%	7%	7%	6%	6%	7%	9%
Up to € 2,000	16%	19%	20%	17%	18%	16%	20%
Up to € 1,500	20%	23%	21%	20%	20%	23%	19%
Up to € 1,000	24%	21%	22%	25%	26%	19%	24%
Up to € 500	9%	9%	7%	9%	6%	11%	12%
Less than € 500	4%	3%	2%	3%	4%	6%	1%

Source: Representative population survey (n =2,065) in Spain, IPK International 2007  
 Deviations from 100% due to rounding. \* = less than 0,5%

- When it comes to price acceptance, there are no substantial differences between the individual types of holidays. Most of those interested would be willing to spend between 1,000 to 1,500 euro for a one-week winter holiday in Northern Norway, regardless of holiday type.

## 5. Summary: Spanish Market

Summarizing the most important findings of the population survey reveals the following:

- 33% of the Spanish show a spontaneous interest in winter holiday possibilities in Northern Norway.
- Interested in winter holiday possibilities in Northern Norway are primarily:
  - younger groups (up to 44 years old)
  - middle and upper social classes (education levels and income brackets)
- The most important regional focus markets in Spain for winter holidays in Northern Norway are:
  - Central Spain with the capital Madrid
  - Eastern Spain with the city of Barcelona
  - Northeast Spain
- The by far largest interest for the Spanish lies in:
  - Winter cruises along the Norwegian Coast / “Hurtigruten”.
- A certain interest also exists for:
  - Dog sledding tours
  - Alpine skiing holiday
  - North Cape tour
  - Staying at a hotel offering various winter activities
  - Winter whale watching / “Killer Whale Safari”



- The least interest is shown for:
  - Visiting Santa Claus
  - Deep Sea fishing
  - “King Crab Safari”
  
- Generally speaking, the price acceptance for winter holidays in Northern Norway is between 1,000 and 1,500 euro (regardless of holiday type).





## **G. OVERVIEW OF THE SIX MARKETS AND RECOMMENDATIONS**

## 1. Interest in Winter Holiday Possibilities in Northern Norway in the Six Markets

When asked which types of winter holidays would be of interest in Northern Norway, the population in the six countries showed a basic interest in the various winter holiday possibilities in Northern Norway as follows:

	Germany	Great Britain	France	Italy	The Netherlands	Spain
Interested in winter holiday possibilities in Northern Norway	27%	25%	69%	41%	47%	33%
Not interested in winter holidays in Northern Norway	73%	75%	31%	59%	53%	67%

Source: Representative population surveys in Germany, Great Britain, France, Italy, The Netherlands, Spain. IPK International 2007

- When asked about the type of winter holiday they would consider for a winter holiday in Northern Norway, a large – in some markets, very large – percentage of the population showed a spontaneous interest in some of the various proposed winter holiday possibilities in Northern Norway.
- However, to be kept in mind when assessing this interest potential is that it largely represents a subgroup of people who have never dealt extensively with holiday possibilities in Northern Norway (neither in summer nor in winter), but feels spontaneously inclined toward individual holiday possibilities.



- Thus, it will be of vital importance for Northern Norway to capitalize on this positive inclination toward a winter holiday in Northern Norway and use active marketing to attract winter holidaymakers from the general interest potential seen to exist.
- A first step will depend on translating the current “theoretical” interest (as the surveys were prompted) into a more concrete interest; i.e., the attention of most of the “theoretically interested” first has to be drawn to Northern Norway as a destination for winter holidays.

## 2. Interest in the Various Winter Holiday Possibilities in Northern Norway in the Six Markets

When asked which special type of winter holiday / specific activities would be of interest for Northern Norway, the population in the six markets responded:

Type of Holiday	Germany	Great Britain	France	Italy	The Netherlands	Spain
Winter tour with Northern Lights experience	11%	8%	19%	21%	28%	5%
Winter cruise / "Hurtigruten"	9%	7%	20%	20%	17%	16%
Winter whale watching / "Killer Whale Safari"	8%	8%	26%	11%	22%	7%
Dog sledding tours	9%	5%	37%	13%	17%	9%
Staying at a hotel offering various winter activities	6%	5%	22%	10%	16%	8%
Winter North Cape tour	7%	2%	12%	10%	17%	8%
Staying at an "ice hotel"	6%	5%	12%	8%	17%	6%
Alpine skiing holiday	4%	8%	15%	6%	11%	9%
Experiencing Sami culture with reindeer driving	7%	3%	16%	9%	12%	5%
Arctic "Art & Culture" tour	4%	2%	11%	13%	8%	5%
Cross-country skiing	4%	4%	15%	8%	6%	5%
Deep Sea fishing in winter	3%	3%	11%	5%	4%	4%
Deep Sea rafting in winter	2%	2%	9%	2%	4%	5%
Winter big crab fishing / "King Crab Safari"	1%	1%	5%	2%	3%	4%

Source: Representative population surveys in Germany, Great Britain, France, Italy, The Netherlands, Spain. IPK International 2007

For the surveyed markets, the most appealing winter holiday possibilities in Northern Norway would be:

- In **Germany**, the largest interest was shown for the following holiday offers:
  - Winter tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Dog sledding tours
  - Winter whale watching / “Killer Whale Safari”
  
- In **Great Britain**, the largest interest was shown for the following holiday offers:
  - Winter tour with Northern Lights experience
  - Winter whale watching / “Killer Whale Safari”
  - Winter cruise along the Norwegian Coast / “Hurtigruten”

In addition, the British market also shows an alpine skiing segment (as a special interest segment).

- In **France**, the largest interest was shown for the following holiday offers:
  - Dog sledding tours
  - Winter whale watching / “Killer Whale Safari”
  - Staying at a hotel offering various winter activities
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  - Winter tour with Northern Lights experience



- In **Italy**, the by far largest interest was shown for:
  - Winter tour with Northern Lights experience
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  
- In **The Netherlands**, the by far largest interest was shown for:
  - Winter tour with Northern Lights experience
  - Winter whale watching / “Killer Whale Safari”
  
- In **Spain**, the interest focuses on:
  - Winter cruise along the Norwegian Coast / “Hurtigruten”
  
- Thus, the most appealing wintertime product for Northern Norway in all the markets would be:
  - a tour experiencing the Northern Lightsas well as
  - a Hurtigruten cruise
  
- In all countries, the **least** interest can be noted for the following Northern Norway wintertime holiday offers:
  - Deep Sea fishing
  - Deep Sea rafting
  - “King Crab Safari”

### 3. Price Acceptance for a Winter Holiday in Northern Norway in the Six Markets

The maximum amount those persons expressing an interest in winter holiday possibilities in Northern Norway would be willing to spend for a one-week winter holiday in Northern Norway (in total per person; including flight, accommodation, meals, activities, etc.) is as follows:

Maximum amount willing to spend	Germany	Great Britain	France	Italy	The Netherlands	Spain
More than €3,000	2%	2%	2%	4%	1%	6%
Up to €3,000	6%	5%	4%	9%	3%	13%
Up to €2,500	4%	8%	4%	7%	5%	7%
Up to €2,000	17%	14%	12%	16%	17%	16%
<b>Up to €1,500</b>	<b>25%</b>	<b>35%</b>	<b>20%</b>	17%	<b>32%</b>	<b>20%</b>
<b>Up to €1,000</b>	<b>33%</b>	<b>20%</b>	<b>31%</b>	<b>25%</b>	<b>35%</b>	<b>24%</b>
€500 or less	11%	6%	22%	23%	8%	13%
Don't know	3%	8%	4%	-	-	-

Source: Representative population surveys in Germany, Great Britain, France, Italy, The Netherlands, Spain. IPK International 2007

- In all markets, the majority of those interested would be willing to spend between 1,000 and 1,500 euro for a one-week winter holiday in Northern Norway (including flight, accommodation, meals, activities, etc.).
- In comparison, France and Italy have an above-average share of those who want to spend clearly less than 1,000 euro on a winter holiday in Northern Norway.



- The main price range for wintertime Northern Norway offers should therefore be:
  - Approximately 1,000 to 1,500 euro on the German, British, French, Dutch and Spanish markets.
  - While in Italy, wintertime Northern Norway offers should be focused around 1,000 euro (and less at 1,500 euro).



## 4. Target Group for a Winter Holiday in Northern Norway in the Six Markets

Those persons expressing an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic characteristics:

Socio-demographic Characteristics	Germany	Great Britain	France	Italy	The Netherlands	Spain
<b>Gender</b>						
Male	51%	48%	48%	48%	46%	53%
Female	49%	52%	52%	52%	54%	47%
<b>Age</b>						
Up to 24 years	19%	19%	18%	16%	20%	23%
25 – 34 years	15%	22%	17%	24%	21%	27%
35 – 44 years	21%	23%	21%	23%	21%	23%
45 – 54 years	18%	17%	16%	16%	20%	11%
54 – 64 years	13%	12%	14%	11%	16%	11%
65 years and older	15%	8%	14%	10%	2%	6%
<b>Social Class</b>						
Upper (A/B)	38%	30%	20%	19%	22%	27%
Middle	48%	54%	59%	66%	55%	50%
Lower	15%	16%	21%	15%	23%	24%
<b>Children in Household</b>						
Yes	31%	36%	38%	29%	33%	19%
No	69%	64%	62%	71%	67%	81%

Source: Representative population surveys in Germany, Great Britain, France, Italy, The Netherlands, Spain. IPK International 2007



Population groups who expressed an interest in winter holiday possibilities in Northern Norway exhibit the following socio-demographic profile:

- both men and women  
in Germany and Spain: slightly more men than women
- primarily younger and middle age groups (up to 54 years of age)  
in Spain: up to 44 years
- middle and upper social classes
- on average: 30% having children in their households  
Spain: 20%, France 40%

In all markets, the primary target group for winter holidays in Northern Norway is consistently seen to be the middle and upper social classes. The age group focus is on those under 54 years old (Spain: 44 years).

## 5. Marketing Recommendations for Northern Norway Winter Holiday Products in the Six Markets

### 5.1. Priority Markets

- In principle, all the surveyed markets show interest in winter holiday possibilities in Northern Norway.
- France, Italy, The Netherlands and Spain show a higher share of interested than Germany and Great Britain. On the other hand, Germany and Great Britain are by far the largest and most important outbound travel markets in Europe.
- If the marketing budget allows, wintertime Northern Norway could in principle be actively marketed in all the markets.
- If priorities must be set for budget reasons, the following market priorities would be recommended:

1<sup>st</sup> priority:      Germany  
                            Great Britain  
                            The Netherlands

2<sup>nd</sup> priority:      France  
                            Italy

3<sup>rd</sup> priority:      Spain

## 5.2. Main Products

- The main product for Northern Norway in the winter would best be served by a combination product:

### ***"Experiencing the Northern Lights with Hurtigruten"***

In developing the basic product, a 1-2 day Whale Watching Safari should be included and individual shore excursions should include dog sledding tours (stays of several days also possible). On the whole, the trip itinerary should be fixed (all-inclusive offer).

- Such a combination offer
  - could in principle be actively marketed in all the surveyed countries
  - would address the widest target group in all markets
  - would make it possible for Norway to distinguish itself from its Swedish and Finnish Scandinavian competitors with its own (unique to Norway) winter product
- Besides for this main product, some individual markets would also respond to active marketing of primarily a so-called "stationary winter holiday" – meaning staying at a hotel offering winter activities such as dog sledding, snowmobiling, reindeer sleds, etc.
- As a destination for (alpine) skiing holidays, Northern Norway's opportunities are only limited and that only in the British market.

***Main products for the different markets:***

- Germany: 1. Combination product  
Northern Lights experience – Hurtigruten – whale watching – dog sledding
- Great Britain: 1. Combination product  
Northern Lights experience – Hurtigruten – whale watching – dog sledding  
(a special emphasis should be given to whale watching)  
2. (Smaller) special interest segment: alpine skiing
- France: 1. Combination product  
Northern Lights experience – Hurtigruten – whale watching – dog sledding  
(a special emphasis should be given to dog sledding)  
2. Stationary holiday with winter activities (with focus on dog sledding)
- Italy: 1. Combination product  
Northern Lights experience – Hurtigruten (including North Cape) – whale watching – dog sledding  
(possibly combined with some “Arctic Art & Culture”)  
2. Stationary holiday with winter activities
- Netherlands: 1. Combination product  
Northern Lights experience – Hurtigruten (including North Cape) – whale watching – dog sledding  
2. Stationary holiday with winter activities (including ice hotel)
- Spain: 1. Combination product  
Hurtigruten (including North Cape) – whale watching – dog sledding



### 5.3. Prices

- In principle, the one-week “Northern Lights experience / Hurtigruten” combination offer should have a price focus of approximately 1,000 to 1,500 euro (main price range; including flight, accommodation, meals, excursions, activities, etc.).
- Italy represents the sole exception to the above: for the Italian market, this type of product should be priced closer to 1,000 euro than to 1,500 euro.

## 5.4. Target groups

### ***Socio-demographic Profile***

- In all the markets surveyed, the interest potential primarily comes from the middle and upper social classes (which, however, does not mean that they will also accept higher prices).
- The following age groups would be the primary focus for the main product:
  - Germany: 35+ years
  - Great Britain: 25+ years
  - France: 25-54 years
  - Italy: 25-54 years
  - Netherlands: 25+ years
  - Spain: 25-44 years
- The following age groups would be the primary focus (in the respective markets) for a stationary holiday with activities:
  - France: all age groups (focus on younger ones)
  - Italy: 25-54 years
  - Netherlands: up to 44 years
- An alpine skiing holiday would primarily be of consideration for:
  - Great Britain: men, up to 44 years



## ***Regional Focus Markets***

- In principle, there is nationwide interest in wintertime Northern Norway holidays in all the surveyed markets. Yet seen as regional source markets for the concentrated marketing of the basic product (also due to their respective population shares) are:

Germany: North Rhine-Westphalia / Lower Saxony /  
Southern Germany (Bavaria, Baden-Wuerttemberg)

Great Britain: London / Southeast England / East England

France: Greater Paris (Ile de France) / West and South  
West France / South East France

Italy: nationwide (if necessary: focus on Northwest and  
Central Italy)

Netherlands: West Holland with the 3 big cities  
(Amsterdam, Rotterdam, The Hague)

Spain: Northeast and Eastern Spain





## 5.5. Sales Activities

### ***Main Product***

In principle, promoting and selling the main product (Northern Lights experience with Hurtigruten) in all the surveyed markets should be a combined effort with the Hurtigruten cruise line.

### **Distribution**

Once refined, the “Northern Lights experience with Hurtigruten” main product (including whale watching and dog sledding excursions) should ultimately be promoted in the catalogues of those tour operators who offer wintertime tours / cruises in all the markets (thus not just the tour operators who specialize exclusively in Scandinavia). The “Northern Lights experience with Hurtigruten” should essentially constitute the tour product for Norway in the winter.

Beyond that, the distribution channels which Hurtigruten already has in place should also be used (e.g. special travel agency / operator contacts).



## **Communication**

- The **message** should be:  
***“Northern Lights experience with Hurtigruten”***

The survey findings allow the assumption to be made that the “Northern Lights experience” might well hold a special fascination and attraction in all markets (with the exception of Spain).

Thus: Hurtigruten poses a unique opportunity for the Northern Lights experience (synergy for Hurtigruten: increased emotional tie-in to its own product).

- **Target group approach** via
  - Internet
  - Public Relations on TV
  - Advertising in cooperation with Hurtigruten

The first appeal should take place via:

### **Public Relations on TV**

Numerous television stations in the surveyed markets have travel shows as a fixed program component. Many countries additionally have dedicated “holiday channels.”

The basic product should be presented in the context of a travel film on such broadcasts / program channels (including booking information).



### **Advertising in cooperation with Hurtigruten**

The Hurtigruten cruise line company already advertises regularly in many countries today.

The available budget should be optimized by running co-op advertising with Hurtigruten.

### **Internet**

Today's Internet is an important source of information for consumers / tourists. Usually, however, the Internet only becomes a source of information once the consumer begins to weigh a holiday destination or holiday possibility more strongly; in other words, once other means (e.g. advertisement, PR) have already made the consumer aware of the possibility of taking a winter holiday in Northern Norway in the first place.

The Internet should showcase the base product in detail and with good pictorial material (Northern Lights), enhanced by descriptions / narratives, e.g. the singular Northern Lights experience from the water, a whale watching excursion, the experience of mushing an overland dog sled team, etc.

This Internet presentation must be found both at "visitnorway" as well as "Hurtigruten."

The Internet presentation should be supplemented by a list of the tour operators / travel agencies in the respective country through which a traveler can book the trip.

It goes without saying that each Internet page should be in the country's respective national language.



In principle, the Internet should be the main source of information. Brochures and travel trade fairs do not come close to matching its range and should therefore not be pursued (also for financial reasons).

## ***Additional Products***

### **Distribution**

Additional products for the respective markets (stationary holiday with winter activities, alpine skiing) should be marketed through **special-interest tour operators**. In order to ensure an appealing and generous depiction in the catalogues, their production should be subsidized and/or full-page catalogue ads purchased.

### **Communication**

The additional products should be promoted via

- Public Relations on TV
- Internet



## **H. ANNEX**

**Questionnaire**

**Tables and Methodology per Country**

