



GfK Public Affairs & Corporate Communications



# **The Anholt-GfK Roper Nation Brands Index<sup>SM</sup>**

## **2014 Report**

October 2014

Prepared for:

Norway

GfK Public Affairs & Corporate Communications  
200 Liberty Street  
New York, NY 10281

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## Introduction to 2014 NBI<sup>SM</sup>

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The 2014 NBI<sup>SM</sup> survey has been conducted in 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural and tourism activities. Given the increasing global role played by developing countries, the survey strives to represent regional balance as well as balance between high-income and middle-income countries. The core 20 panel countries are:

**Western Europe/North America:** The U.S., Canada, the UK, Germany, France, Italy, Sweden

**Central and Eastern Europe:** Russia, Poland, Turkey

**Asia-Pacific:** Japan, China, India, South Korea, Australia

**Latin America:** Argentina, Brazil, Mexico

**Middle East/Africa:** Egypt, South Africa

In all, 20,125 interviews have been conducted with at least 1,000 interviews per country for the 2014 NBI<sup>SM</sup> survey. Adults age 18 or over who are online are interviewed in each country. Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender and education of the 2013 online population in that country. Additionally, in the U.S., the UK, South Africa, India, and Brazil, race/ethnicity has been used for sample balancing. The report reflects the views and opinions of online populations in these 20 countries – citizens who are connected to the world. Fieldwork was conducted from July 10<sup>th</sup> to July 28<sup>th</sup>, 2014<sup>1</sup>.

NBI<sup>SM</sup> measures the image of 50 nations. In each panel country the list of 50 nations is randomly assigned to respondents, each of whom (except Egypt) rates 25 nations, resulting in each nation getting approximately 500 ratings per panel country. In Egypt, where respondents are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation getting approximately 200 ratings.

By special request, an additional 500 interviews were conducted in each of the following: Holland, Denmark, Finland, and Spain (a total of 2,000 additional interviews). As with the core-20 panel countries, each respondent provided responses on 25 of the 50 measured nation, chosen as random. This resulted in each nation receiving approximately 250 ratings from each additional panel countries. Fieldwork in Spain was conducted concurrently with the main sample; fieldwork in Holland, Denmark and Finland was conducted from July 17<sup>th</sup> to August 4<sup>th</sup>, 2014.

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<sup>1</sup> Field in Egypt was extended to July 31<sup>st</sup>

The list of 50 nations is based on the political and economic importance of the nations in global geopolitics and the flow of trade, businesses, people, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems are taken into consideration to make the study truly global. NBI<sup>SM</sup> subscription members' interests are also reflected in the selection of the countries.

The list of 50 nations<sup>2</sup> is as follows, listed by region:

**North America:** The U.S., Canada, Puerto Rico\*

**Western Europe:** The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, Switzerland, Finland, Austria, Greece, Norway\*

**Central/Eastern Europe:** Russia, Poland, Czech Republic, Hungary, Turkey, Ukraine\*

**Asia-Pacific:** Japan, South Korea, China, India, Thailand, Indonesia, Singapore, Taiwan, Australia, New Zealand

**Latin America:** Argentina, Brazil, Mexico, Chile, Peru, Colombia, Ecuador, Jamaica\*

**Middle East/Africa:** United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Kenya, Nigeria, Qatar

Data analyses and reporting are carried out by GfK's global place branding research team.

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<sup>2</sup> Chinese respondents are asked of all nations except their own.

\* Nations new to the NBI<sup>SM</sup> 2014. Four nations measured in 2013 but not in 2014 are Malaysia, Belgium, Botswana, and Croatia.

## About GfK Public Affairs & Corporate Communications and GfK Custom Research North America

GfK Public Affairs & Corporate Communications is a division of GfK. The group specializes in customized public affairs and public opinion polling, media and corporate communications research, and reputation measurement in the U.S. and globally. In addition to delivering a broad range of customized research studies, GfK Public Affairs & Corporate Communications draws from GfK's syndicated consumer tracking services, GfK Roper Reports® US and GfK Roper Reports® Worldwide, which monitor consumer values, beliefs, attitudes, and behaviors in the U.S. and more than 25 other countries. The division also serves as the official polling partner of the Associated Press conducting the AP-GfK Poll ([www.ap-gfkipoll.com](http://www.ap-gfkipoll.com)).

GfK is one of the world's leading research companies, with more than 11,500 experts working to discover new insights about the way people live, think and shop, in over 100 markets, every day. GfK is constantly innovating to use the latest technologies and the smartest methodologies to give its clients the clearest understanding of the most important people in the world: their customers. In 2012, GfK's sales amounted to EUR 1.37 billion.

## About Simon Anholt

Simon Anholt is recognized as the world's leading authority on national image and identity. Professor Anholt was Vice-Chair of the UK Government's Public Diplomacy Board, and works as an independent policy advisor to the Heads of State and Heads of Government of more than 50 other countries. Anholt developed the concept of the Nation Brands Index<sup>SM</sup> and the City Brands Index<sup>SM</sup> in 2005. He is the founder and Editor Emeritus of the quarterly journal, Place Branding and Public Diplomacy, and the author of Brand New Justice, Brand America and Competitive Identity – the New Brand Management for Nations, Cities and Regions. His latest book, Places, was published by Macmillan in 2010, together with a completely new edition of Brand America. Anholt was awarded the 2009 Nobels Colloquia Prize for Economics and a Professorship Honoris Causa in Political Science by the University of East Anglia in 2013.



## 4. Overall Reputational Assessment for Norway

### How the World Sees Norway

In the intervening six years since Norway's last inclusion on the NBI<sup>SM</sup>, the country has been thrust into the world stage's spotlight for a variety of reasons. These reasons range from the terrorism and tragedy that gripped Norway July 22, 2011; to the country's wealth as global onlookers observe how oil-rich Norway utilizes its revenue; to the values underpinning the country, including Norway's egalitarianism, environmental efforts, and investments to preserve its social safety net to deliver a high quality of life.

Though much has occurred in Norway and in many other peer nations since 2008, Norway maintains its 13<sup>th</sup> place finish on overall NBI<sup>SM</sup>, demonstrating the strength and resilience of the country's global reputation.

The 2014 Global NBI<sup>SM</sup> Hexagon below illustrates the specific dimensions comprising Norway's reputation. Norway ranks among the top two tiers on all indices, save for Culture, where it still remains in the top-half. Foundational and momentum components – the Governance and Immigration/Investment indices – fuel Norway's image, though Norway performs well on the Exports and People indices as well.

**Figure 7: Global NBI<sup>SM</sup> Hexagon**

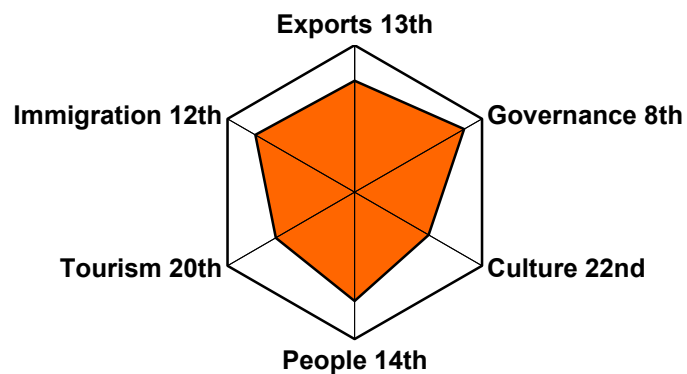
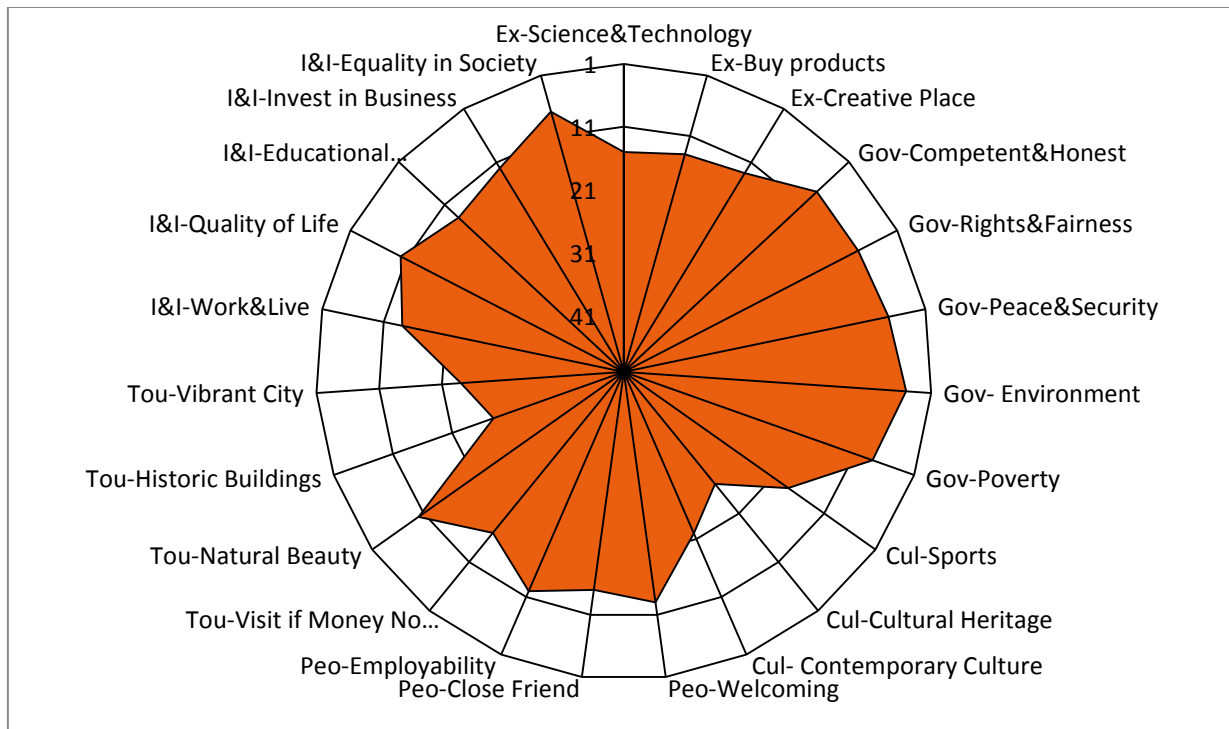


Figure 8 below shows Norway's rankings on the 23 attributes comprising the Hexagon indices. Norway is a well-regarded nation, and the crux of its public image is bolstered by the strength of its domestic and global governance as well as the equality well-known in its society. Governance is the strongest dimension of Norway's global image ranking within the top-10 – a boon to the country as many of the Governance attributes underpin and drive favorability.

Included in the Governance Index is environmental protection. While we might expect an oil-rich nation such as Norway to experience some difficulty in gaining recognition as a guardian of the environment, the global public acknowledges and appreciates Norway's sustainability efforts. Norway's environmental travails edge Norway into the top-five on this attribute, making Norway's actions to protect the environment its strongest asset. Furthermore, the near future offers Norway an opportunity to raise and burnish its profile as an environmental vanguard, as the #2 global priority focuses on protecting the environment and natural resources. As mentioned earlier, there is a high degree of global consensus surrounding this priority, yet no one country has yet to credibly harness the mantle of environmental protection and establish itself as a dominant leader on this front, as even the top-ranked leader receives little more than a tenth (12%) of the global populace's backing.

**Figure 8: NBI<sup>SM</sup> Attributes**



Though Norway has not lost ground on either its Tourism or Culture indices in terms of score change since 2008, these two dimensions drag down Norway's image, and Norway eking into the top-10 on overall NBI<sup>SM</sup> would be predicated upon rectifying its deficits here. Norway's most pronounced shortfalls on these two indices stem from an under-appreciation of the country's history, particularly the history of its architecture and culture.



## 5. How Individual Panel Countries See Norway

Table 3's "heat grid" offers a deeper analysis into which panel countries facilitate Norway's well-regarded reputation as well as which panel countries impede Norway from gaining in ranks. Ranging from dark green to dark red, the cell colors help make Norway's strengths and weaknesses stand out visually across the globe. Dark green indicates countries and areas in which Norway excels, whereas dark red indicates countries and areas that lag behind for Norway.

Norway's image shines in Euro-zone leader Germany and from its Nordic neighbors<sup>3</sup>, which all see Norway as a top-five nation. Norway's strengths in terms of its domestic and global governance receive widespread acclaim, netting Norway a top-10 ranking on the Governance Index in 16 of the 24 panel countries. The U.S., Brazil, Mexico, India, China, South Korea, Egypt, and South Africa are the countries to reserve a lower-tier ranking for Norway's Governance. There is also a similar pattern globally regarding Norway's equality – but Brazil, Mexico, and South Korea rank Norway's equality as top-tier.

At the opposite end of the spectrum, Egypt and India serve as Norway's constant and harshest critics. Egypt's views of Norway often represent the nadir, as Norway's notable weaknesses on cultural heritage and historic buildings are propelled most by Egypt.

The critiques leveled most against Norway – its relative weakness in terms of its cultural heritage and historic buildings – are universal blemishes as not a single panel country accords to Norway a top-tier finish on either attribute, and instead level critiques in the form of second-, third-, fourth-, and even a bottom-tier finish.

Since awarding Liu Xiaobo the Nobel Peace Prize in 2010, relations between Norway and China have been strained. Further complicating the countries' relationship is another Nobel laureate, the 14<sup>th</sup> Dalai Lama who was awarded the peace prize in 1989 and visited Norway this year to commemorate the 25<sup>th</sup> anniversary. While the Chinese government may have been strong-handed in its reaction to Norway, ordinary Chinese do not seem to have a particularly negative opinion. Norway gathers a 20<sup>th</sup> ranking in China, comparable to that in three other developing countries – Argentina, Mexico, and South Africa – and higher than Norway's ranking in India and Egypt. Moreover, among Norway's highest ranked items in China is its respect and fair treatment of its citizens at 11<sup>th</sup>, tied with environmental record and natural beauty. In fact, Norway's Governance ranks 12<sup>th</sup> in China, the highest of all indices and fully eight positions ahead of its Exports or Tourism.

In other news, Norway's sovereign wealth fund – the world's largest – recently purchased logistics properties in Madrid and Barcelona, making Spain's views of Norway timely. Spain expresses a nuanced view of Norway that aligns largely with the country's overall, global image. However, one of the key points of

<sup>3</sup> Denmark, Finland, Holland, and Spain are included in 2014 as proprietary panel countries. While these countries' rankings of Norway are shown in the below table, their scores do not contribute to Norway's total 20-country scores and rank-standing.

divergence is on the Governance Index, where Spain offers Norway #2 spot, quite a bit higher than the eighth-place finish Norway gathers globally. Spaniards give Norway a #1 ranking on protecting the environment (the only other countries ranking Norway #1 on the environment are Germany and Poland). Spain's opinion is brought down by Norway's Culture and Tourism, and Spain is more critical of Norway's People, particularly their employability compared to global citizens across the panel countries.

**Table 3: Norway's Rankings by Panel Countries**

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States	Denmark	Finland	Netherlands	Spain
Nation Brands	13	20	14	16	13	20	31	11	5	26	13	12	20	7	14	20	17	4	11	14	17	4	5	10	13
Exports	13	23	14	18	10	20	32	14	6	26	11	10	20	9	15	21	16	7	10	14	15	7	8	10	11
Governance	8	10	8	11	5	12	15	6	3	22	6	8	12	1	7	15	12	2	4	9	13	1	2	8	2
Culture	22	29	21	33	18	22	36	19	13	35	22	19	28	15	17	28	24	9	17	20	22	9	11	17	20
People	14	21	11	18	12	19	31	7	4	28	12	17	18	7	17	21	18	4	11	10	13	2	4	11	16
Tourism	20	28	15	25	19	20	36	14	13	26	17	13	26	14	20	24	17	16	12	15	19	11	17	9	20
Immigration-Investment	12	16	12	15	11	15	23	10	5	21	10	11	16	4	12	18	13	2	9	10	16	4	4	9	11
Ex-Science&Technology	15	22	15	17	11	20	28	16	8	25	11	12	18	10	15	23	17	11	13	16	16	8	8	11	12
Ex-Buy products	14	20	14	16	11	19	34	12	5	25	10	11	18	10	17	18	15	4	11	14	17	4	3	7	11
Ex-Creative Place	13	23	14	17	10	20	31	13	7	25	9	10	20	9	15	24	16	9	9	14	14	6	8	11	11
Gov-Competent&Honest	8	10	7	11	5	12	22	6	4	23	7	8	15	2	7	14	13	1	5	5	11	1	1	8	2
Gov-Rights&Fairness	8	9	9	10	6	11	18	8	4	23	9	7	13	1	7	17	12	1	2	8	15	1	1	11	5
Gov-Peace&Security	7	10	9	8	8	8	19	10	4	21	6	9	16	1	10	14	11	2	4	9	14	2	2	8	3
Gov- Environment	5	12	7	8	5	11	14	3	1	20	4	6	8	1	6	11	10	3	3	4	13	3	4	3	1
Gov-Poverty	8	10	11	13	10	17	14	6	2	27	8	9	11	1	5	12	11	2	5	10	9	3	4	11	3
Cul-Sports	18	32	23	32	12	28	32	19	12	36	20	26	29	10	11	30	20	7	17	21	16	11	7	14	19
Cul-Cultural Heritage	27	28	25	31	22	20	43	21	21	35	24	19	28	24	18	29	27	19	26	15	25	13	18	23	18
Cul- Contemporary Culture	22	25	16	29	20	22	32	13	11	32	17	16	23	14	22	28	23	14	15	17	21	11	15	16	18
Peo-Welcoming	13	21	11	26	13	18	30	9	6	31	11	18	25	7	19	23	17	4	9	9	13	1	3	13	8
Peo-Close Friend	15	26	13	18	13	20	29	8	4	27	11	14	21	11	18	23	18	5	8	12	14	4	9	14	17
Peo-Employability	12	16	9	14	11	17	24	12	5	23	14	13	17	5	12	16	15	5	13	11	15	2	3	9	17
Tou-Visit if Money No Object	17	26	13	22	17	17	33	10	5	30	13	12	21	9	16	22	18	13	11	13	18	10	12	5	13
Tou-Natural Beauty	10	25	9	25	10	11	29	13	6	23	7	5	28	5	10	17	8	3	6	9	14	2	3	1	8
Tou-Historic Buildings	28	33	20	28	22	21	39	29	23	26	25	26	35	26	24	26	28	24	23	23	24	22	28	23	27
Tou-Vibrant City	24	24	18	27	22	19	31	19	24	28	23	19	24	26	30	30	17	26	17	21	23	15	25	22	23
I&I-Work&Live	14	18	14	16	13	14	25	16	8	23	12	14	16	3	15	19	16	3	10	15	14	7	10	8	12
I&I-Quality of Life	10	12	11	14	11	15	22	5	4	22	6	12	14	3	10	16	12	2	4	9	16	2	2	4	6
I&I-Educational Qualifications	14	16	13	15	11	20	20	10	8	22	14	14	18	9	13	17	13	8	8	13	17	8	7	10	13
I&I-Invest in Business	12	20	13	17	10	19	28	11	6	22	13	12	17	6	13	20	18	2	10	11	17	7	6	13	8
I&I-Equality in Society	7	8	11	10	9	14	16	7	2	17	3	8	9	1	5	14	10	2	2	7	14	3	2	5	7

**Note:** The cells are colored using Excel conditional formatting. Dark green shows the most positive rankings and dark red most negative rankings.



## A Look at Year-on-Year Panel Country Change

Table 4 shows Norway's NBI<sup>SM</sup> indices and attributes score changes between 2008 and 2014<sup>4</sup>, highlighting areas where the country is gaining momentum as well as areas where erosion has transpired. In this table, Norway's strongest improvements across all countries and all indices or attributes are shaded dark green and its strongest deteriorations are shaded dark red.

In a year where most leading nations have shown sizeable score improvements on the NBI<sup>SM</sup> indices and attributes, it is important to bear in mind that Norway's growth is benchmarked against its 2008 performance. Forty-three of the 50 nations included in the 2014 NBI<sup>SM</sup> were also included in 2008<sup>5</sup>. In the past six years, Norway has increased its overall score by two points, which is slightly more than the average increase among these 43 nations over the past six years (2.0 points vs. 1.8 points). This upward trend is also greater than the increases experienced by many neighboring nations, including Sweden, Denmark, and Finland over this time period (1.5, 1.8, and 1.9, respectively). Furthermore, at the global level, Norway has not experienced deterioration on any Hexagon Index or attribute, further underscoring the strength and resilience of Norway's reputation.

Importantly, Egypt – the nation giving Norway its lowest rankings – awards Norway with some of its greatest gains – along with China – whereas in France there has been notable deterioration, which produces the largest score drop for Norway on overall NBI<sup>SM</sup>. There is some loss in Argentina as well.

Norway's improved image is stanchioned by obvious, across-the-board gains on the Immigration/Investment Index as a whole – an area is where Norway's reputation has surged in the past six years. Norway's primary strength – its Governance – entertains many stable or swelling views, but does experience some loss in a number of countries, including France, Poland, Italy, and Mexico among others. Elements pertaining to domestic Governance, including its competence and honesty and protection of citizens' rights have held over the past six years, whereas perceptions of Norway's responsible behavior to address global issues such as protecting the environment and reducing world poverty have grown in several countries, but have also decreased in France, Poland, and Italy – and Mexico for its poverty reduction.

On Norway's weakest dimensions – its cultural heritage and historic buildings – positive movement has occurred in the BRIC countries as well as Australia, Canada, Germany, Italy, Turkey, the UK, and South Korea for the former, and in the aforementioned countries (save for South Korea) along with France and Mexico for the latter. These pain-points for Norway are exacerbated by erosion on these attributes in the U.S., Argentina, and Egypt, among others.

Growing diversity in Norway, contributing to Norway's changing, less homogenous face, has prompted internal consternation over issues such as immigration and religious tolerance in recent years. It has also sparked evolving, mixed reactions from Muslim-majority panel countries. Egypt has granted Norway tremendous gains on the People Index; while Norway's warm, welcoming nature has backslid in India; and

<sup>4</sup> Please note 2008 data was calculated to the nearest tenth of a point, whereas 2014 data is calculated to the nearest hundredth; all score change are rounded to the closest tenth of a point to avoid making any assumptions about the 2008 data.

<sup>5</sup> Colombia, Greece, Jamaica, Kenya, Puerto Rico, Qatar, and Ukraine are the countries for which there is not corresponding 2008 data.

Turkey holds divided views, believing Norwegians are increasingly welcoming, yet their likelihood of seeing Norwegians as close friends has decreased.

**Table 4: 2008-2014 Score Change by Panel Countries**

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
Nation Brands	2.0	-0.5	3.2	3.6	4.2	6.0	4.5	-1.1	4.2	1.8	1.5	0.8	0.8	1.1	3.4	0.1	2.3	1.3	2.7	2.1	0.4
Exports	1.7	-3.5	3.7	2.7	3.5	7.9	4.1	-2.7	3.2	2.4	2.0	-0.1	-2.2	1.7	4.0	-1.0	3.7	4.1	3.2	1.8	-0.4
Governance	0.8	-0.4	3.6	4.6	5.4	6.6	5.1	-4.1	3.9	-0.8	-1.4	1.2	-1.4	-2.8	-1.5	-2.1	0.7	0.3	1.7	1.8	0.2
Culture	1.1	-0.9	2.1	0.0	2.2	4.9	-1.7	1.1	3.3	1.3	0.1	-0.2	-0.7	2.0	5.5	0.3	0.9	-0.2	3.7	0.8	-0.4
People	0.3	-4.1	2.7	3.6	2.4	3.1	6.6	-2.6	2.2	-0.4	-1.7	-0.3	2.4	-2.7	2.5	-1.5	0.0	-1.8	-0.5	1.0	1.4
Tourism	0.3	-0.7	0.2	3.4	1.7	2.8	3.8	-1.1	2.8	0.0	1.8	-1.1	-0.9	0.3	2.3	-0.8	0.0	-2.2	0.2	-0.1	-2.9
Immigration-Investment	7.5	6.5	6.9	7.9	9.9	11.1	9.3	2.7	9.9	8.3	7.9	5.6	7.6	8.1	7.1	5.3	8.2	8.1	8.4	7.4	4.5
Ex-Science&Technology	0.1	-0.2	0.2	0.2	0.2	0.3	0.1	-0.3	0.2	0.1	0.2	0.0	-0.1	0.2	0.4	0.1	0.2	0.4	0.3	0.1	-0.1
Ex-Buy products	0.1	-0.2	0.2	0.1	0.3	0.8	0.4	0.0	0.3	0.2	0.2	-0.1	-0.3	0.1	0.0	-0.2	0.3	0.2	0.1	0.1	0.0
Ex-Creative Place	0.2	-0.2	0.3	0.3	0.1	0.3	0.2	-0.2	0.3	0.1	0.1	0.1	-0.1	0.0	0.4	-0.1	0.1	0.2	0.3	0.1	0.0
Gov-Competent&Honest	0.0	-0.1	0.2	0.2	0.4	0.4	0.2	-0.3	0.1	0.0	0.0	0.0	-0.1	-0.2	0.0	-0.2	-0.1	-0.1	0.1	0.0	0.1
Gov-Rights&Fairness	0.0	-0.1	0.2	0.3	0.4	0.5	0.3	-0.3	0.2	-0.1	0.0	0.1	-0.2	-0.2	0.0	-0.3	0.1	-0.1	-0.1	0.1	-0.1
Gov-Peace&Security	0.0	-0.1	0.3	0.2	0.4	0.5	0.2	-0.2	0.3	-0.2	0.0	0.1	-0.1	-0.2	-0.6	-0.1	0.1	0.1	0.2	0.1	0.0
Gov-Environment	0.1	0.1	0.2	0.3	0.3	0.4	0.2	-0.4	0.4	0.0	-0.1	0.1	0.1	-0.3	0.1	0.0	0.0	0.1	0.0	0.2	0.0
Gov-Poverty	0.1	0.0	0.2	0.2	0.3	0.3	0.5	-0.1	0.3	0.0	-0.3	0.1	-0.2	-0.1	0.1	0.0	0.2	0.0	0.3	0.1	0.1
Cul-Sports	0.1	-0.1	0.2	-0.1	0.3	0.3	-0.3	0.0	0.1	0.0	0.0	-0.1	-0.1	0.3	0.4	0.2	0.1	0.1	0.1	-0.1	0.0
Cul-Cultural Heritage	0.1	-0.2	0.1	0.1	0.1	0.3	-0.2	0.0	0.2	0.1	0.1	0.0	-0.1	-0.1	0.4	-0.1	0.1	0.0	0.2	0.1	-0.1
Cul-Contemporary Culture	0.1	0.2	0.1	0.1	0.0	0.3	0.0	0.2	0.3	0.1	0.1	0.0	0.0	0.2	0.3	0.0	0.1	-0.1	0.3	0.2	0.0
Peo-Welcoming	0.0	-0.1	0.2	0.3	0.3	0.3	0.4	-0.1	0.2	-0.1	-0.1	0.0	0.0	-0.2	0.2	-0.1	0.0	-0.2	0.3	0.1	0.1
Peo-Close Friend	0.1	-0.3	0.1	0.1	0.1	0.1	0.4	-0.1	0.2	0.0	-0.1	0.0	0.4	-0.1	0.1	-0.2	0.0	0.0	-0.1	0.0	0.1
Peo-Employability	0.0	-0.3	0.3	0.3	0.0	0.3	0.4	-0.3	0.1	0.0	-0.1	0.0	0.1	-0.2	0.1	-0.1	0.0	-0.2	-0.3	0.1	0.2
Tou-Visit if Money No Object	0.0	-0.3	-0.2	0.2	0.0	0.0	0.5	-0.1	0.3	-0.2	-0.1	-0.2	-0.2	-0.2	0.1	-0.1	0.0	-0.2	-0.1	-0.1	-0.3
Tou-Natural Beauty	0.0	0.2	0.0	0.3	0.0	0.2	0.4	-0.3	0.1	0.0	0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.2	0.0	0.0	-0.1
Tou-Historic Buildings	0.0	-0.1	0.1	0.2	0.2	0.3	-0.1	0.1	0.1	0.1	0.3	-0.1	0.1	0.0	0.2	0.0	0.0	-0.1	0.1	0.1	-0.2
Tou-Vibrant City	0.1	0.0	0.2	0.1	0.2	0.3	0.2	0.0	0.2	0.1	0.2	0.1	0.0	0.2	0.2	0.0	0.1	-0.1	0.0	0.1	-0.2
I&I-Work&Live	0.1	0.2	0.1	0.2	0.1	0.2	0.5	-0.4	0.1	-0.1	0.3	0.0	0.4	0.2	-0.2	-0.1	0.2	0.1	0.4	0.0	0.1
I&I-Quality of Life	0.1	-0.1	0.1	0.2	0.3	0.3	0.1	-0.2	0.2	0.0	0.1	0.1	0.0	0.0	0.1	-0.2	0.2	0.1	0.0	0.2	-0.2
I&I-Educational Qualifications	0.1	0.1	0.2	0.0	0.3	0.4	0.1	-0.2	0.2	0.2	0.1	-0.1	0.0	0.2	0.4	-0.1	0.3	0.1	0.1	0.1	0.1
I&I-Invest in Business	0.0	-0.1	-0.1	-0.1	0.0	0.1	0.1	-0.3	0.1	0.2	-0.1	-0.1	0.0	0.0	-0.1	-0.2	0.0	0.0	0.0	0.0	-0.2
I&I-Equality in Society	0.1	0.4	0.1	0.3	0.4	0.5	0.1	-0.4	0.3	0.2	-0.1	-0.1	0.1	0.1	0.0	0.0	0.1	0.1	-0.1	0.4	-0.1

**Note:** The cells are colored using Excel conditional formatting. Green show positive changes and red negative changes. Changes reflect the raw, and not indexed, score change.



## 6. Norway's Descriptive Profiles

In this section, we show the top of mind signatures that are associated with Norway. The three tables below are Products (words from Exports and Culture), Feel (words from People and Tourism), and Momentum (words from Governance and Immigration/Investment)<sup>6</sup>.

Though oil accounts for roughly a fifth of the country's economic output, Norway's chief products associations do not center on the country being oil-rich. The hallmark of Norway is the perceived diversity of Norway's Exports, with "high technology" topping the list followed by its epicurean Exports, "agriculture" and "food." Teeming with "museums," "modern design," and "sports," Norway's Culture also has a variety of strengths on which to draw to improve the country's image as a vibrant city.

**Table 5: Products (Exports and Culture) Word Associations**

Exports	Total	Culture	Total
	%		%
High technology	18	Opera	9
Banking	11	Pop Videos	9
Automotive	7	Circus	7
Advertising	9	Sculpture	15
Crafts	12	Museums	22
Agriculture	15	Street Carnival	10
Fashion	7	Films	13
Food	15	Sports	18
Oil	12	Modern design	19
Film and television	5	Music	13

Contributing to the country's Feel are Norway's hardworking People and the captivating nature of Norway's Tourism. Norwegians are seen as industrious People, as the global public considers them "hard-working," "honest," and "skillful." Views of Norway's "fascinating," "relaxing," and "exciting" Tourism present an opportunity for the country to convert existing associations into higher rankings on the Culture and Tourism indices to fuel a desire to visit the country, which is a top driver of favorability and is increasingly important for a country that wants to move from being second-tier nation to the top tier.

<sup>6</sup> Exports, Culture, People, and Tourism word associations allowed for multiple responses; Governance and Immigration/Investment word associations only allowed for a single response.

**Table 6: Feel (People and Tourism) Word Associations**

People	Total	Tourism	Total
	%		%
Honest	26	Romantic	13
Hard-Working	30	Depressing	3
Lazy	4	Exciting	21
Ignorant	4	Boring	8
Unreliable	5	Fascinating	27
Skillful	24	Risky	4
Fun	12	Educational	20
Tolerant	17	Stressful	3
Rich	15	Spiritual	7
Aggressive	2	Relaxing	22

Norway's Momentum is a combination of the reliability and trustworthiness in which Norway's Governance is grounded and the modernity exemplified by its Immigration/Investment. The stability of Norway's Governance mirrors the host of Governance strengths attributed to nation. Few consider Norway "dangerous" or "unstable," suggesting that the July 22, 2011 terrorist attacks did not permanently pierce public consciousness or alter overarching perceptions. In addition, Norway remains one of the least corrupt nations in the world, an association and advantage evidenced by the few mentions of Governance as "corrupt." Stable Governance is not to be confused with stasis in the case of Norway, however. Norway's Immigration/Investment, viewed foremost as "modern" followed by "forward-thinking" reinforces the contemporary and cutting-edge aspects of the nation's Products – including the "modern design" associated with its Culture and the "high-tech" nature of its Exports.

**Table 7: Momentum (Governance and Immigration/Investment) Word Associations**

Governance	Total	Immigration/ Investment	Total
	%		%
Reliable	24	Backward	1
Unpredictable	6	Developing	11
Transparent	10	Forward-Thinking	17
Trustworthy	21	Ambitious	11
Dangerous	3	Modern	26
Corrupt	2	Declining	4
Reassuring	13	Isolated	3
Unstable	2	Stagnant	5