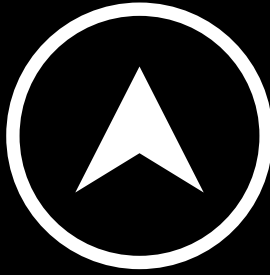


MINDREADER

*– a close look into the media habits, lives,
concerns, attitudes and cultural differences
of the Nordic people.*





CULTURAL CHANGE IS LIKE A LEOPARD STUCK IN
AN ELEVATOR: *Hard to predict, quick to lose its cool,
and liable to tear off your arm if you make a wrong move.*





THIS IS OUR MINDREADER REPORT
ON THE NORDIC PEOPLE.

Keep up with the facts and tame the leopard

The Trends

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HOW WELL DO YOU KNOW YOUR FELLOW COUNTRY(WO)MEN?

– and are your Nordic neighbors what you think they are?

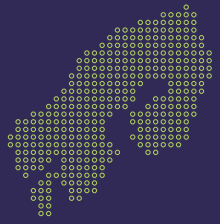
Just about anyone knows that a Finn is a print-reading, sauna-loving toughie with fantastic stamina. Similarly true are the facts that a Swede loves technology, drives a Volvo and must have consensus in the entire family/workplace in order to make a decision, whereas a Dane pursues a comfortable life, likes a good bargain and downs a beer bottle faster than you can shout Tuborg. A Norwegian, on the other hand, is happier, more rural and takes off cross country skiing to the mountain cottage as soon as his/her generous work schedule allows. Are these really truths or just tiresome preconceived notions? Perhaps it is time to set some old stereotypes straight or at least learn more nuances about the Nordic people. Mindshare has the tool to help you – Mindreader.

Mindreader is Mindshare's unique proprietary study launched in 2008, looking into digital consumers from around the world. The latest fieldwork was done in November 2013 and covers 44 markets across 5 continents (19 markets in Europe). Using an online panel, 1,000-2,000 people (aged 18-65) in each country have been surveyed.

The aim of Mindreader is to not only understand people's media habits but to also understand their lives, concerns, attitudes and cultural differences.

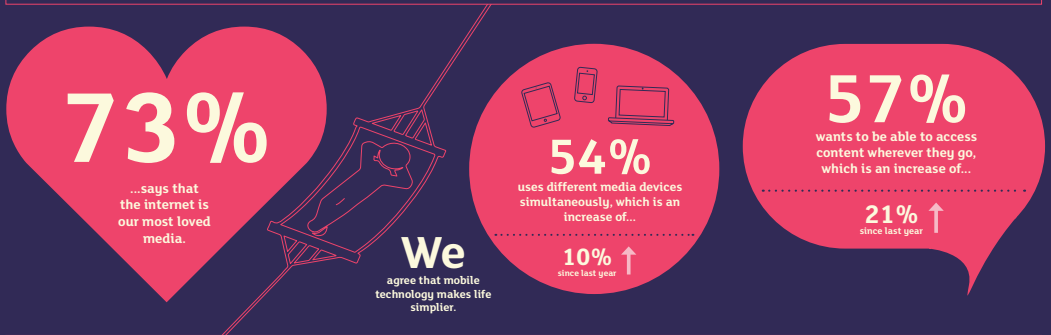
In this report, we have looked more closely at the Nordic markets. Stay on top of the facts and read to absorb useful insights into the similarities and differences between our nationalities. Some quick learnings on technology changes on a Nordic basis in the info graphics to the right before we delve deeper into a number of issues such as media, content, interests, trust, wellbeing, success etc.

How digital technology has changed our perspectives



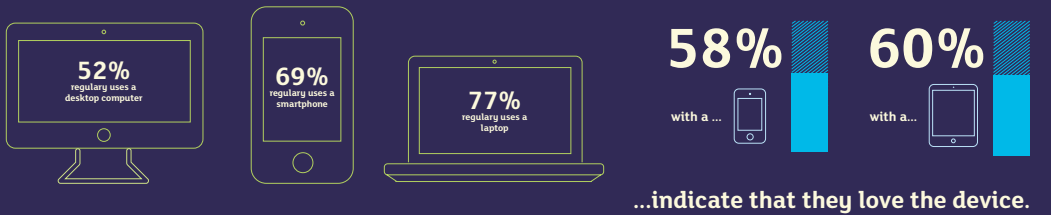
Though most of us love the internet and many of us want to be able to access it wherever we are, browsing the internet is in the bottom when it comes to activities we do to improve our sense of wellbeing.

Media



Use of devices

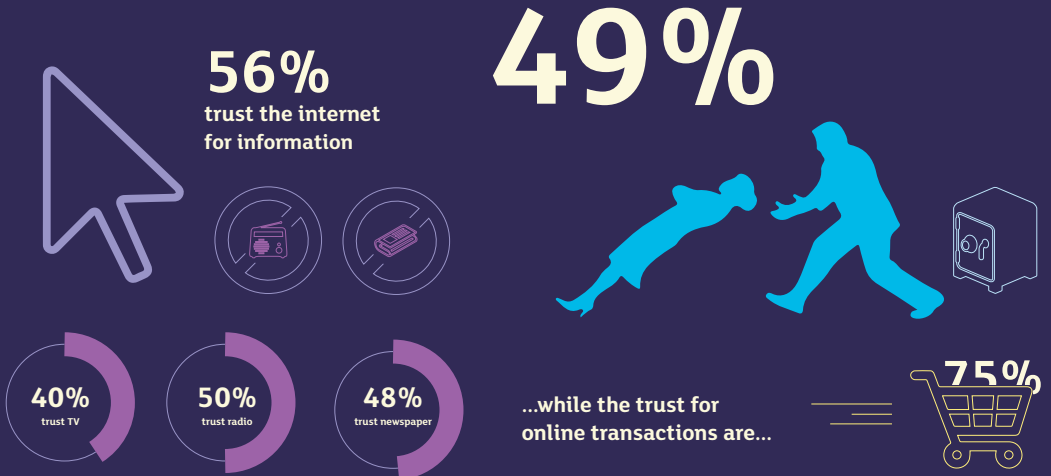
"Tablets and smartphones are the most loved devices."



Trust

We tend to trust the internet more compared to traditional media.

The trust for banks are...



TOP 5 MOST L♥VABLE MEDIA

MINDREADER NOT ONLY PLUNGES INTO HOW OFTEN WE USE A CERTAIN MEDIA CHANNEL OR WHAT CONTENT WE WATCH/READ THE MOST, BUT ALSO THE ACTUAL LOVE THAT WE FEEL FOR A CERTAIN DEVICE/MEDIA CHANNEL.

DENMARK ♥

TOP 5 LOVE	SHARE OF POP.
INTERNET*	73%
TABLET	63%
SMARTPHONE FOR INTERNET	61%
MOBILE PHONE (CALLS/TEXT)	60%
TV	58%

SWEDEN ♥

TOP 5 LOVE	SHARE OF POP.
INTERNET*	75%
SMARTPHONE FOR INTERNET	58%
TABLET	54%
MOBILE PHONE (CALLS/TEXT)	49%
TV	46%

EUROPE ♥

TOP 5 LOVE	SHARE OF POP.
INTERNET*	75%
MOBILE PHONE (CALLS/TEXT)	58%
TV	54%
RADIO	49%
CINEMA	46%

FINLAND ♥

TOP 5 LOVE	SHARE OF POP.
INTERNET*	71%
TABLET	57%
TV	54%
MOBILE PHONE (CALLS/TEXT)	53%
SMARTPHONE FOR INTERNET	48%

NORWAY ♥

TOP 5 LOVE	SHARE OF POP.
INTERNET*	80%
TABLET	68%
MOBILE PHONE (CALLS/TEXT)	68%
TV	65%
SMARTPHONE FOR INTERNET	64%

*Internet can be split up into internet for transactions, information, entertainment, self-expression and communicating/socializing.

MEDIA LOVE

The graphic of the top 5 lovable media shows that the Nordic region is ahead of Europe when it comes to the love for smartphone and tablet usage. The only traditional media channel still on the Nordic markets' lists is TV, and it is hanging on by a thread in Denmark and Sweden.

Radio has lost ground in all markets, but Sweden especially (Spotify effect?). Also, Swedes are the mobile pioneers of the Nordics. If you split the love of “internet” into various types of uses and devices, the most lovable media for the Swedes is then the smartphone for internet. Finland - Nokia country – does not rank mobile usage as high as their Nordic counterparts

“Finns have been less eager to adopt new smart phone technology early on, since we have been quite true to Nokia. There are still old Nokia models working, which means that the conversion rate has been lower than in the rest of the Nordic region. Here, 46% still uses a mobile phone that isn't a smart phone”

KATI RAVANTTI, RESEARCH ASSISTANT
MINDSHARE FINLAND



“It’s actually quite surprising to find that the Norwegians are less interested in sports coverage than the Danes and the Finns. The general perception of Norwegians is that they live for skiing in the winter and for other sports in the summer. But then again, it could be that Norwegians actually exercise a lot or do various activities outdoors and don’t necessarily watch sports with a beer in front of the TV to the same extent as hedonistic Dane 😊”

HEGE SKAR, HEAD OF RESEARCH
MINDSHARE NORWAY

POPULAR CONTENT

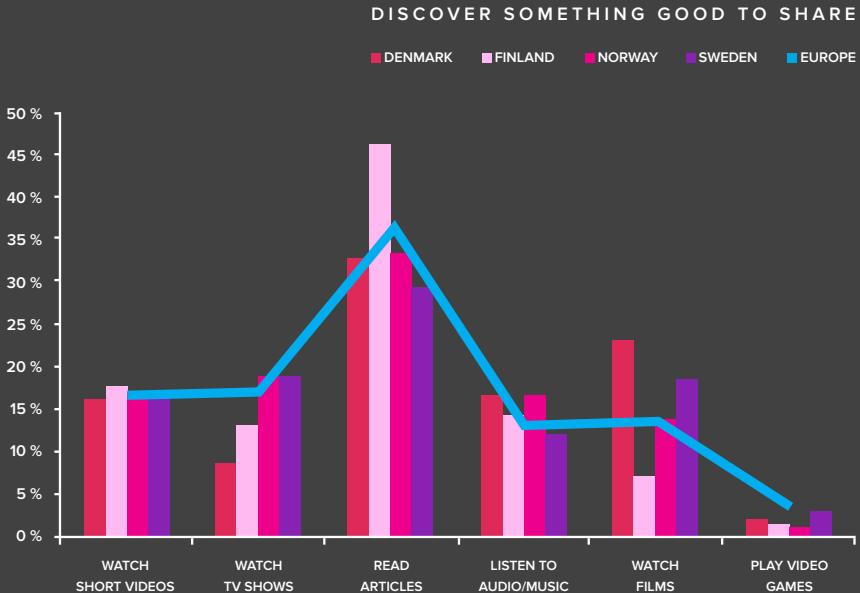
When asked to rank different content types regardless of media platform and format (e.g. TV shows, movies, newspaper articles, radio shows etc.), Nordic people have quite similar attitudes. Movies, news, music and comedy are the most popular shared content forms. However, a few things stick out like sore thumbs such as the Danes being more interested in money/finance and Swedes watching more adult movies than the rest (who would have thought, right?).

Apparently, Finns are keen on health and fitness (72% compared to 58-62% in NO, SE, DK) and as many as 80% claim to be interested in nature shows there, whereas Norwegians are less into sports coverage but much more into arthouse/independent films than their neighbours. When Danes want to relax, they claim to watch films more than their neighboring nationalities (47% compared to 27-30%).

SHARING OF CONTENT

Today, finding and sharing cool or interesting content can be really positive for your personal image, both on social media and in real life.

While the reading of print media is quickly declining in the entire Nordic region, Finland is still hanging on to the printed word to a higher degree. The print reading tradition could be one explanation to the Finns being more prone to reading in order to find something good to share (46%) rather than watching for instance short videos (18%, on a rise in all markets) or regular films (7%).



TECHNOLOGY AND DEVICES

More than 70% of the Nordic people agree that mobile technology makes their life simpler.

The laptop is still the most used device in the Nordic countries as well as in Europe. Together with the desktop, it also the device that is most commonly used to connect to the internet (above 70%). The HD ready flats screen TV is the second most used device, even though TV certainly is no longer among the top 2 most lovable media.

The smartphone is used regularly by approximately 70% of the Nordic people (in Finland clearly less, as stated before). In Sweden, as many as 16% use their smartphone as the primary device to connect to the internet (vs other Nordic markets around 10%).

Finland is significantly different from other Nordic countries in various aspects in the use of technology devices. Finns are not only using considerably less smartphones, but also laptops, subscription TV services, tablets, eBook readers and smart TVs. Even standard TV sets and DVD players are used less than in other Nordic markets. However, Finnish people apparently like to record shows on Digital TV recorders to a higher degree than other Nordic people.

A bit surprising is the fact that 60% of the Finns (and only 49% of the Danes) claim to want to be able to access content wherever they go, a figure that has increased by 30% in the last year only.

All in all, more than 60% of all Nordic people find it important to try to keep up with developments in technology.



“Hardly anyone makes contact with anyone else on the tube in Stockholm nowadays. All eyes are on mobile screens for the latest Instagram flow or the newest screaming goat on Youtube. Whatever will happen to spontaneous flirting? Will it be restricted to dating sites? “

CHARLOTTE BERG
SENIOR MANAGER CONSUMER INSIGHT
MINDSHARE SWEDEN



*“Every waking moment
is a shopping moment.
Anytime, anywhere.”*

STEVE YANKOVICH
HEAD OF EBAY'S MOBILE
BUSINESS

WEEKLY ONLINE ACTIVITIES

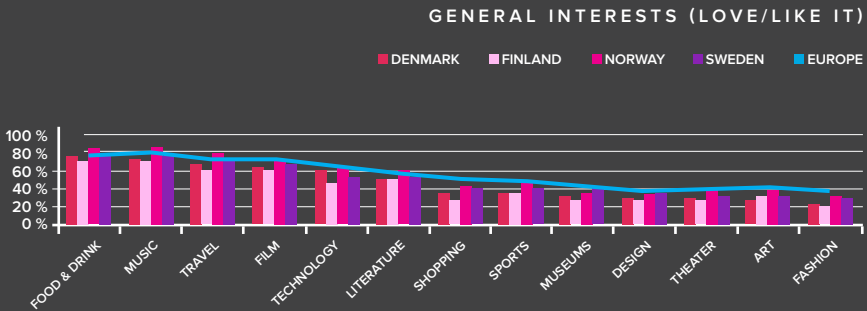
Googling, reading mails and keeping up with current affairs are the top three weekly online activities in the Nordics. Fourth is banking services, which Swedes claim to use less frequently than they visit a social network site, which is the fifth parameter on the list in the Nordics. The most eager to use a social network are however the Norwegians (78% compared to ~68% in the other markets).

Online shopping is quite an interesting parameter to compare. Around half of the respondents in Sweden and Norway choose to buy groceries online every week, whereas only a quarter of them do in Finland. Denmark, at 39%, is close to the European average at 41%.

However, when it comes to buying other goods online, Europe is surprisingly well ahead of the Nordics with 21% compared to 9-12%. This is particularly odd, as we trust online transactions to a higher degree (75% in all of the Nordics vs 65% in Europe).

LEISURE & INTEREST GENERALLY

The Nordic people are similar in our top interests - food & drink, music and travel. More than 60% state that they either like or love these things, which indicates that we are all indulgent nations. Norwegians tend to have a slightly more positive attitude to mosts interests generally (closer to the European average), whereas the Finns are on the opposite spectrum.



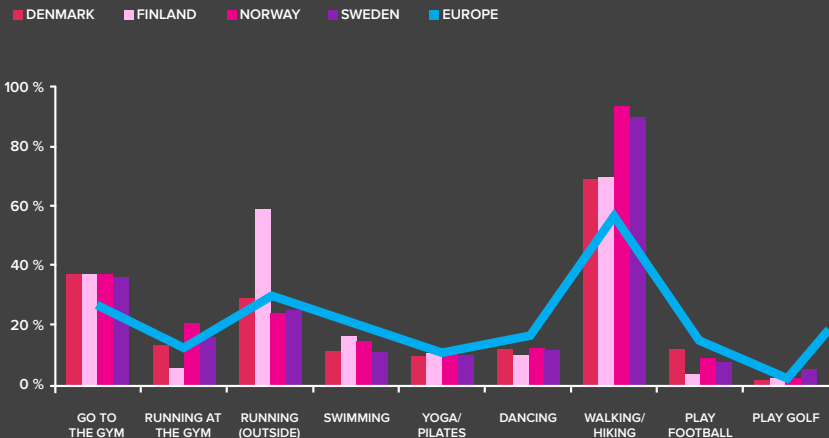
Travelling increases all over the Nordics. The Swedes alone made 18 million trips abroad in 2013. Spain was at the top of the destination list followed by the neighboring countries - Denmark, Finland and Norway*. According to Mindreader, Swedes are the people that choose to pick a different destination every time they travel to a higher degree than their Nordic counterparts.

INTEREST IN SPORTS

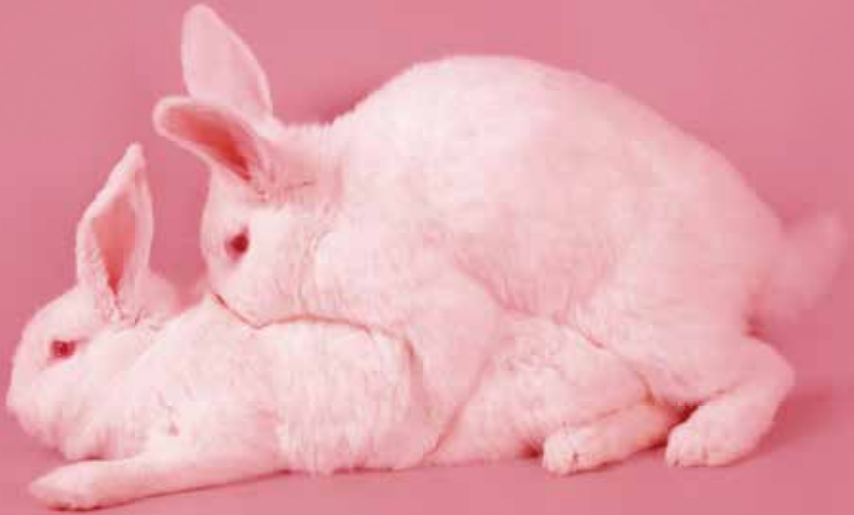
More than 35% of the Nordic people either love or like sports, but we're different when it comes to what kind of sports we enjoy. And there aren't that many surprises here really. Soccer is big overall (less so in Finland) whereas icehockey is huge among Swedes and Finns. Skiing/snowboarding is almost as dominant as soccer in Norway and a great Formula 1 tradition in Finland makes this sport no. 4 in that market. The figures that stand out are Danes not appreciating athletics to the same degree as the other nationalities (19% vs 28-31%) and volleyball and action sports being big in Norway.

When it comes to sports that you actually participate in yourself, there is obviously a major running trend taking place right now. However, Danes, Swedes and Norwegians are likely to be outrun by the Finns. Finns have by far highest share of runners (but are less interested in going to gym, as well as playing soccer), while Norwegian and Swedish clearly prefer walking/hiking to others. Nordic people like go to the gym or walk/hike more than the European average.

ACTIVITIES // ONCE A WEEK







INCREASING YOUR WELLBEING

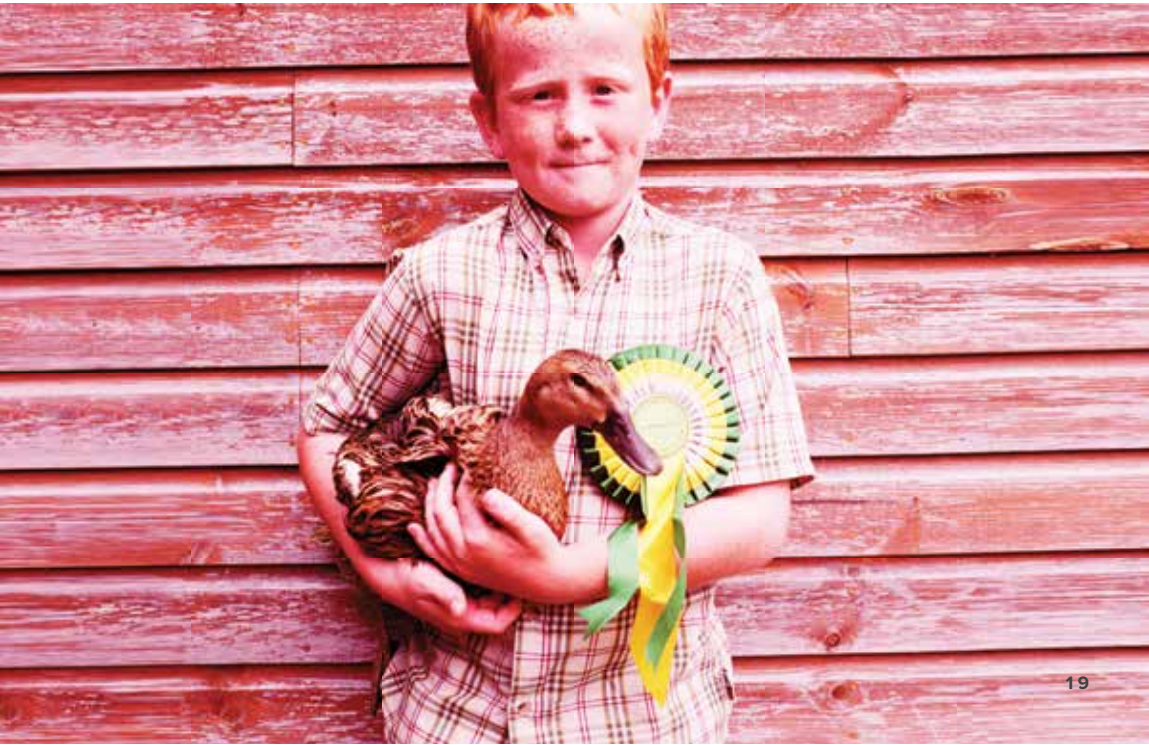
In Mindreader, the respondents are given choices to describe how they improve their sense of wellbeing. Most often – but still surprisingly (?) - less than 2 out of 10 in the Nordic countries choose to spend time with their family as their first choice (Finns even less than others).

Finns and Danes exercise/play more sports and Finns also use media (watch TV, read books/papers or browse in internet) for their wellbeing more than other Nordic people. When looking at the top list across the four countries, we find that around 25% of Finnish and Swedish people list having sex as one of their top 3. Norwegians enjoy massages at least 2.5 times better than than the others.

SIGNS OF SUCCESS

In Norway, Finland and Denmark (DK:67%, SE only 37%), being a dutiful member of your family is a sign of success, whereas Swedes consider external factors, such as being respected in your local community or being debt-free, as more important.

Compared to Europe and actually to the whole world we see Finland and Sweden being at the bottom in observing religious beliefs and practises as a sign of success (4-5%). In Norway, donating money or time to those in need is considered twice the achievement as in Denmark. Finnish people seem to appreciate success at work or expertise/skills more than other Nordic people. Looks and social networking / having influential contacts are less valued in Finnish minds than in other parts of the Nordic region.



CONCERNS

When asking people across the Nordic countries about their biggest concerns, issues such as finances and health are the most represented, which is interesting seen in the perspective that those two parameters are also the ones that people consider the most important indicators of success.

When digging deeper, Finns are not only concerned about their own health but also about the health of close family/friends. Finland is actually the number one country in Europe regarding health concerns. Finns are also more worried about the cost of living (eg. fuel and food prices), one reason being that since 2008, food prices there have risen faster than in other early EU countries (except for Britain).

With one quarter of the population concerned, Swedes are the third most troubled people when it comes to stress in Europe. Compared to Europe, we are all more optimistic about our standard of living compared to last year. Norwegians are the most optimistic of the Nordic people.

“61% of the Danes are worried about the amount of money they owe, which is the highest figure in the Nordics. This must be closely linked to the way we finance real estate here. 30% of all housing is financed with loans that run only for one year. These loans then ‘force’ our attention on the interest rate development quite regularly and keep us on our toes”

**NANA FRYDENBERG
SENIOR BUSINESS PLANNING MANAGER
MINDSHARE DENMARK**

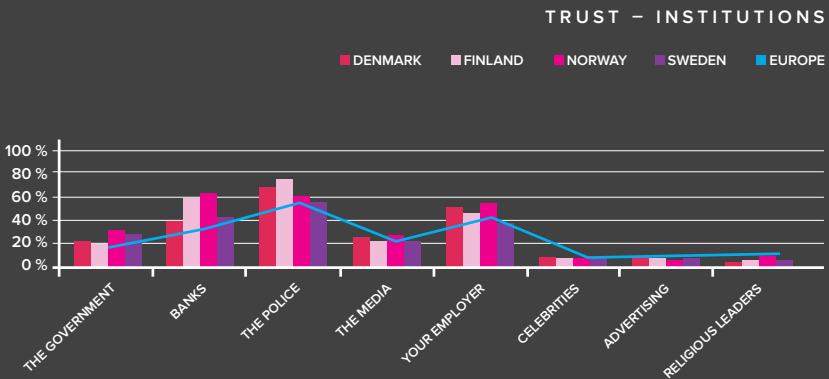




TRUST

Nordic people tend to put a lot more trust in the major institutions of our countries (banks, government and the police) compared to the rest of Europe. This is probably linked to the low perception of corruption in the Nordic countries (according to Mindreader 2012), and the world famous social security systems.

Finland and Denmark even have the highest trust in the police in the world. Danes and Swedes put less trust in banks compared to the other Nordic countries, most likely as a result of the financial crisis and bank scandals.



CONTACT INFO

Have you learnt enough about the Nordic cultural differences or are you anxious to educate yourself further? Have some of your stereotypes been crushed or have they just been reinforced?

The Mindreader report has more than 500 parameters to scrutinize and if you are curious about looking deeper into your specific target audience, these are the Mindsharians to help you:

IN SWEDEN

Charlotte Berg

Senior Manager Consumer Insight
charlotte.berg@mindshareworld.com
+46 70 130 10 10

IN FINLAND

Kati Ravantti

Research Assistant
kati.ravantti@groupm.com
+358 40 718 00 10

IN DENMARK

Nana Frydensberg

Senior Business Planning Manager
nana.frydensberg@mindshareworld.com
+45 70 22 75 25

IN FINLAND

Heidi Laiho

Research Manager
heidi.laiho@groupm.com
+358 40 766 77 07

IN NORWAY

Hege Skar

Head of Research
hege.skar@mindshareworld.com
+47 24 145 560