



ACTIVATING THE NORWAY BRAND

**A report on holiday needs and segments in the Chinese market
for Innovation Norway**

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20th October 2017

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NORWAY A TRUE GLOBAL BRAND

The vision is «**we give local ideas global opportunities**»

Norway has **unique advantages** both in terms of natural resources and modern infrastructure that provides a great number of possibilities for tourists.

Innovation Norway manages not only one brand but the sum of all the brands that make up the destination Norway.

Some of these are **iconic brands** on a global scale.

The challenge is to secure a strong position for all of these so that the sum is stronger than individual parts, creating **truly global** power.

The world is changing.
The travel industry is changing.
People change. How they **interact**
with brands is changing. Their
behavior in relation to vacation
change.

**You may have to adapt and make
changes in the strategy** to keep
pace with the market.

Fundamental consumer insights in
key markets is part of the basis for
this.



UPDATED
INSIGHTFUL
PROACTIVE

Ipsos Marketing

THE PURPOSE OF THE RESEARCH:

TO IDENTIFY THE BEST **MEANS OF STRENGTHENING THE FUTURE** OF THE NORWEGIAN TRAVEL INDUSTRY

TO UNDERSTAND THE **COMPETITIVE LANDSCAPE AND TARGET NEEDS** TO PROMOTE **INNOVATION AND COMMUNICATION**

In order to do so, this research provides answers to the two questions:

- What is the ideal holiday?
- How are destinations (brands) positioned?



1

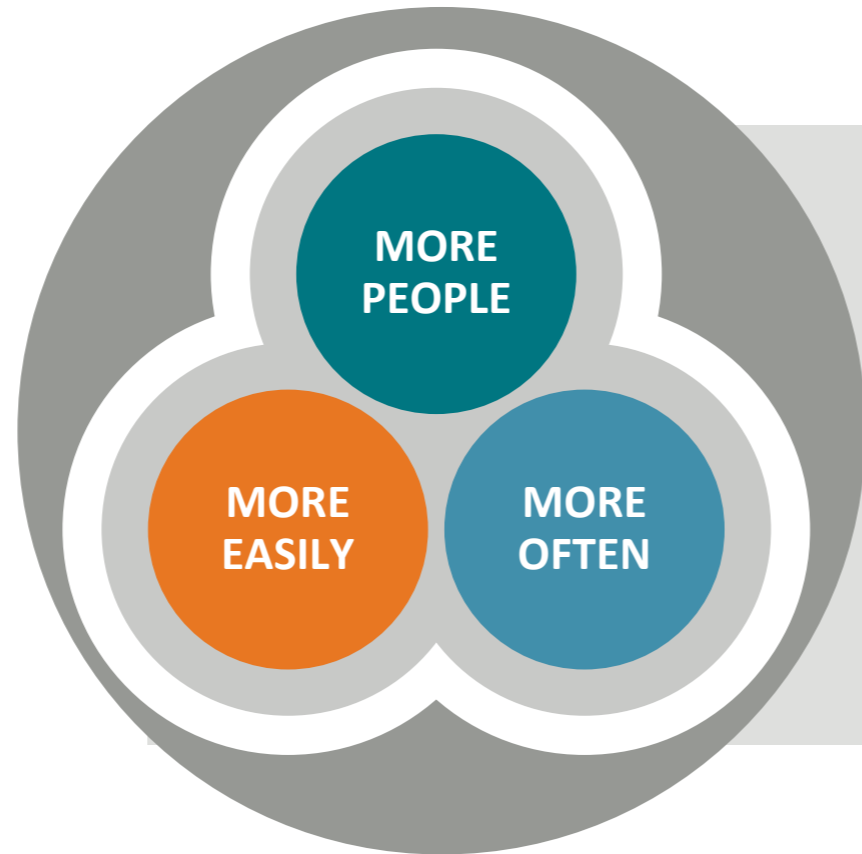
THE PHILOSOPHY BEHIND THE RESEARCH

Point of view & approach

THE STARTING POINT:

UNDERSTANDING HOW BRAND BUILDING WORKS

Brands that grow are brands that are chosen by...



At the Heart of Growing Brands is an understanding of how **PEOPLE** make **CHOICES**

And with increasing Brand Choices, it is more important than ever before to understand how the decision process works in people's minds

THE KEY TO BRAND BUILDING IS TO THINK PEOPLE FIRST

HOW PEOPLE MAKE DECISIONS



Decision-making is often more **unconscious** than conscious, using mental shortcuts to reduce effort.

HOW PEOPLE THINK ABOUT BRANDS



Brands exist in peoples' minds as a **network**: a unique memory structure of thoughts, feelings, experiences, images, stories, associations, colours, sounds, symbols and memories.

HOW PEOPLE ARE INFLUENCED



Memory salience refers to all the existing aspects of the brand's mental network. **Attention salience** is about the cues and stimuli that capture our attention at any touchpoint.



**ALL THE EVIDENCE POINTS
TO PEOPLE BEING MORE
LIKELY TO CHOOSE
BRANDS THAT...**



ARE SALIENT

They must come readily to mind in the moments that matter. They have strong brand networks or associative memory structures so they are easily retrieved in a fast-processing, automatic decision environment

RANK FIRST

They must have the highest perceived value at the moment of choice, compared with alternatives

FORM

RELATIONSHIPS

They must fulfil the key motivational criteria for selection: meeting functional and emotional needs and creating connections

ARE AVAILABLE

They must be accessible (e.g. pricing, distribution). The more easily people perceive that they can obtain one option rather than another similar option, the more likely it is to be selected

BUILDING DEEP BRAND RELATIONSHIPS WITH CENSYDIAM

BE RELEVANT

Associate your brand with relevant category roles



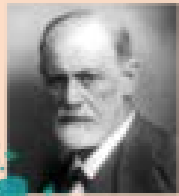
Censydiam Motivational Framework

Censydiam offers a **validated approach** to understand the different roles brands can play in the category.

Censydiam captures the **needs & motivations** that drive relevance in the category, while acknowledging that these needs & motivations can differ across various situations and occasions.

Brands can **grow** if they succeed in connecting themselves to more emotional & functional needs.

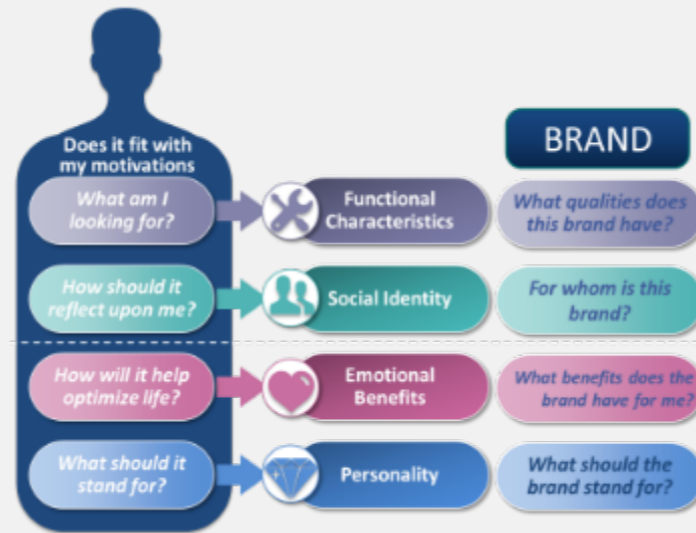
CENSYDIAM IN A NUTSHELL



theories about the unconscious mind and the mechanisms of **release** and **repression**



The double mechanism for satisfaction: a striving for **power** & superiority and for **belonging** & community



Each is deconstructed on key **emotional** and **functional** benefits, brands need deliver on in order to be relevant for consumers in various usage occasions/situations.

These benefits help build rich **networks** and allow consumers to **easily** identify the **best solutions** for their needs.



People first

All decisions are made with fundamental consumer needs at the heart



Universal currency

Comparison possible across markets
Common language



Customizable

Needs are tailored by context, category and markets.



Validated

Over 30+ years experience across the globe & scientific thesis

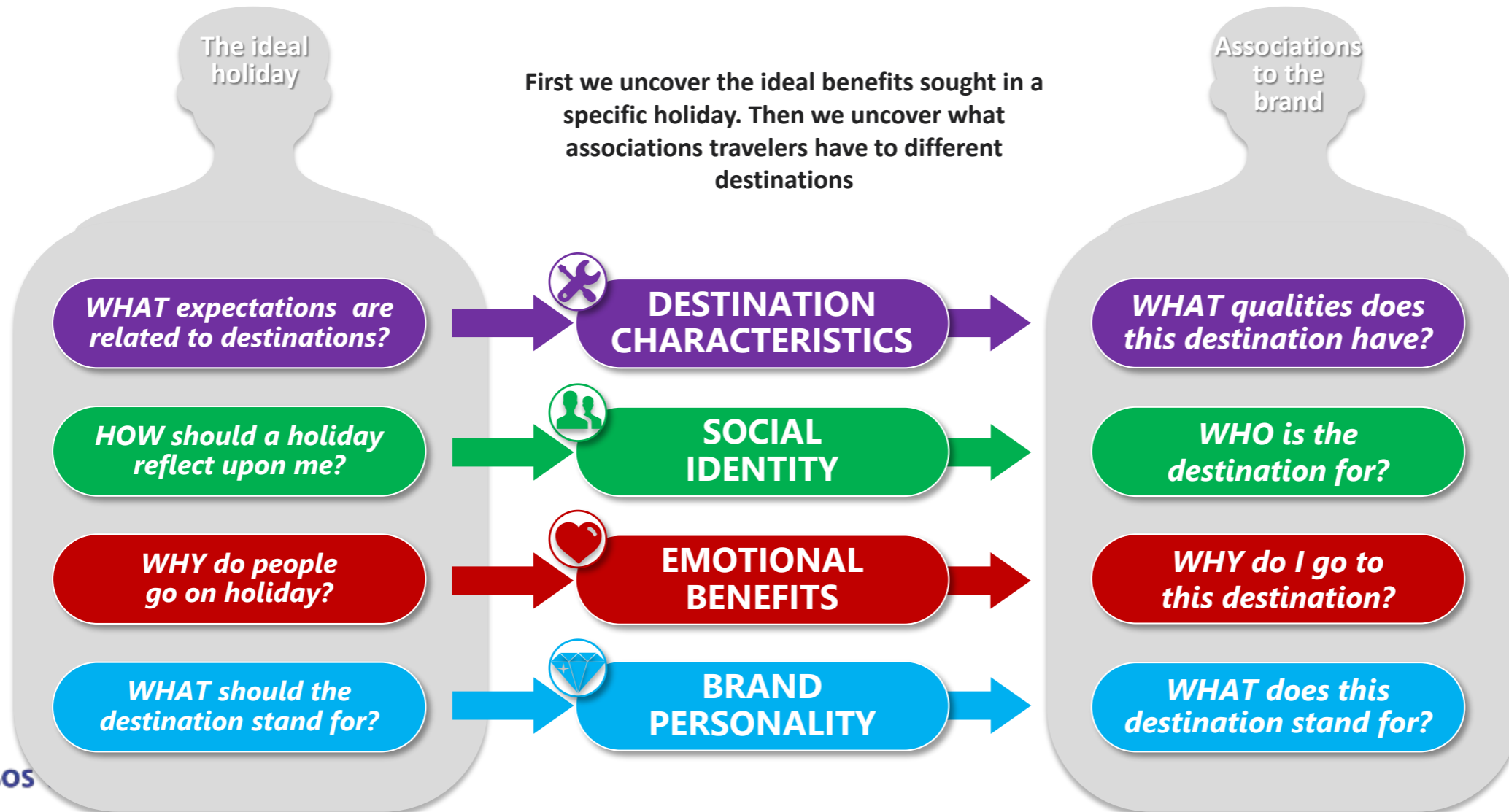


Comparison

Allows comparison over time and markets

CENSYDIAM SEEKS TO UNCOVER THE DIFFERENT DRIVERS

THE BRAND NEEDS TO PLAY ON TO BE RELEVANT



FROM CENSYDIAM HYPOTHESIS TO GLOBAL CATEGORY FRAME

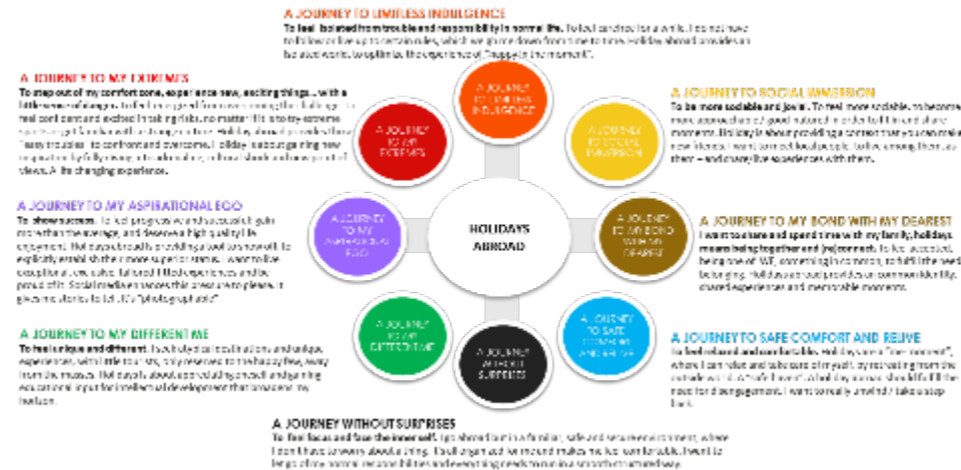
WE HAVE CONDUCTED 1200 INTERVIEWS IN THE MARKET

EACH RESPONDENT HAS PROFILED 2 HOLIDAY OCCASIONS – SO WE HAVE 2400 CASES FOR ANALYSIS

1. We start with the Censydiam model and explore it qualitatively in focus groups.

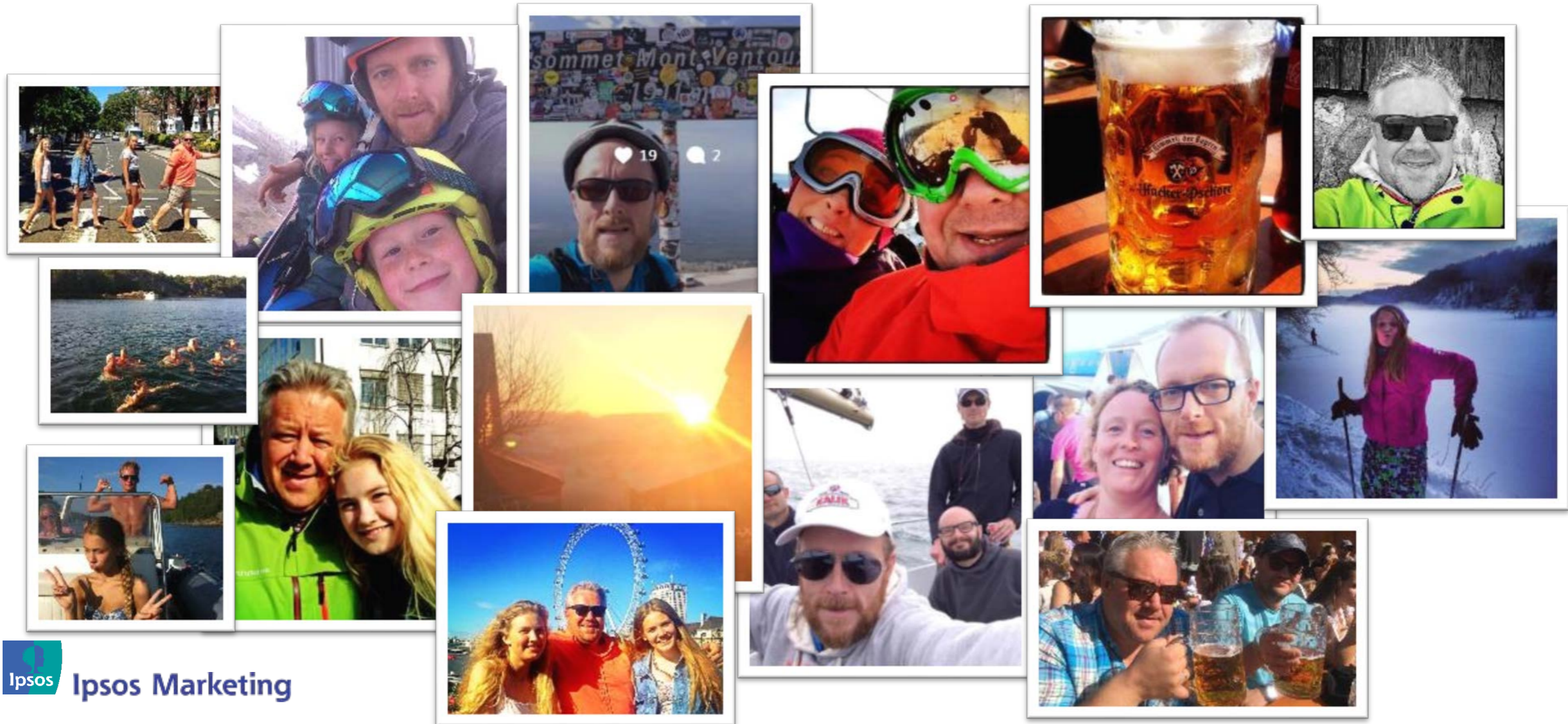
2. The qualitative part then creates a hypothesis on how the Censydiam frame looks like within the holiday category.

3. At this stage this hypothesis have been tested quantitatively in several markets to create one global segmentation model.



THE SAME PERSON, BUT DIFFERENT SITUATIONS AND DIFFERENT MOTIVATIONS

As consumers, we often have different needs depending on the situation. This also applies to holidays. A weekend getaway with a partner has to fulfil different needs than a skiing weekend with friends. This report is, therefore, based on **different occasions** – by occasion we mean **different holidays**. Each respondent has told us what the ideal holiday look like on **two different holiday occasions**.



QUESTIONNAIRE STRUCTURE IN THE QUANTITATIVE INTERVIEW

The model shows the structure of the interview the individual respondent was through

Section 1: Demographics and Screener

- Gender
- Age
- Income
- Etc.
- Have been abroad for holiday last 3 years.

Section 2: Category use

How often do you go on holiday abroad?
Where did you go the last 5 holidays ?
Time of year, duration and type of holiday

Section 3: Awareness & usage

What destinations do you know of?
How many times have you been on holiday to the following countries?

Section 4: Profiling of two holiday occasions

- Type of holiday
- Destination
- Duration
- Who were you with?
- Spending
- Accommodation
- Transport
- Information sources
- Influencers
- Activities
- Consideration set (what destinations would you consider).

Section 5: Profiling of 2 holiday occasions

- Emotional benefits
- Functional benefits
- Personality
- Social identity

Section 6: Profiling of destinations

Please choose the statements that you think are appropriate for each destination.
We use the same statements as in section 5.

HOW DOES THE NEEDS COME ALIVE IN THE ACTUAL INTERVIEW?

The needs are formulated as statements on 4 levels



Emotional benefits

Imagine that you would go on a similar holiday in the future (with the same people, the same destination, the same time, etc.), please tick the feelings and needs the ideal holiday experience should meet for this occasion

- Helps me to enjoy life to the fullest
- Makes me feel completely liberated
- Makes me feel full of energy
- Allows me to immerse myself in the local life
- Helps me to meet new people
- Allows me to share good times with others
- Creates precious moments of togetherness
- Allows me to intensify the relationship with my loved one(s)
- Allows me to spoil my loved ones
- Allows me to pamper myself
- Helps me to escape from my hectic daily life
- Restores my sense of harmony and balance
- Allows me to keep everything under control
- Helps me avoid too much surprises
- Gives me a safe feeling
- Allows me to broaden my horizon
- Allows me to broaden my knowledge
- Enriches my view on the world
- Allows me to indulge myself with a bit of luxury
- Makes me feel on top of the world
- Makes me stand out from the crowd
- Allows me to discover new and interesting places
- Gives me rich experiences
- Gives me new inspiration



Functional benefits

Which are the qualities and characteristics the holiday experience would ideally need to have for this occasion?

- Allows me to be physical active
- Allows me to live close to nature
- Has a variety of accommodation offers
- Has a variety of different restaurant offers
- Has activities for kids
- Has beautiful nature
- Has environmentally friendly offers
- Has few language barriers
- Has friendly people
- Has good beaches
- Has good local cuisine
- Has good medical care
- Has good opportunities to meet local people
- Has good service
- Has good shopping
- Has guaranteed sunshine
- Has interesting culture & art
- Has interesting sights
- Has lots of organized trips and excursions
- Has places to go out partying
- Has quiet environments
- Has rich cultural heritage
- Has romantic spots
- Has unspoiled nature
- Is easy to travel around
- Is easy to travel to
- Is not for just anybody, is exclusive
- Is not ruined by tourism
- Is not too warm
- Is well organized
- Offers a wide range of possible activities
- Good value for money



Personality

Please tick the words that fit the character of your IDEAL future holiday experience for this occasion

- Active
- Playful
- Fresh
- Open-minded
- Sociable
- Outgoing
- Caring
- Friendly
- Cozy
- Harmonious
- Peaceful
- Relaxed
- Practical
- Structured
- Predictable
- Authentic
- Unique
- Cultivated
- Extravagant
- Superior
- Classy
- Explorative
- Adventurous
- Daring



Social identity

Which of the following types of people would you expect to look for the same holiday experience as you?

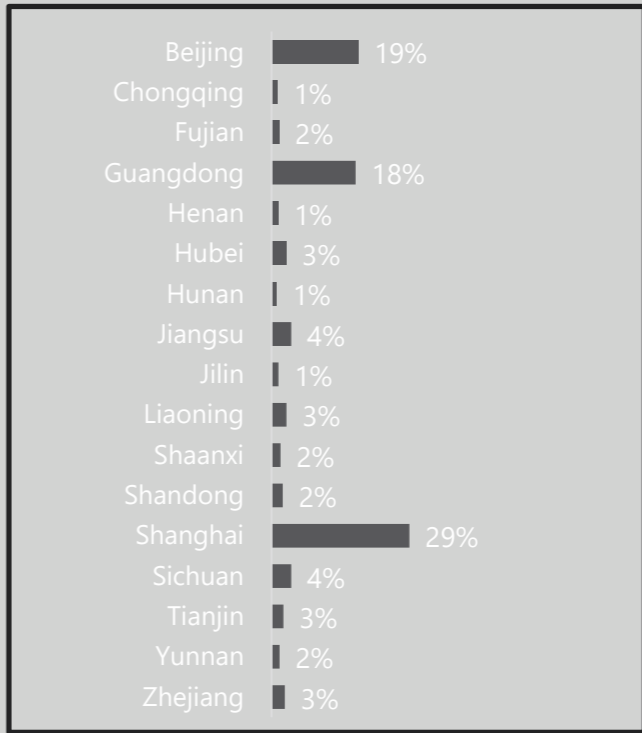
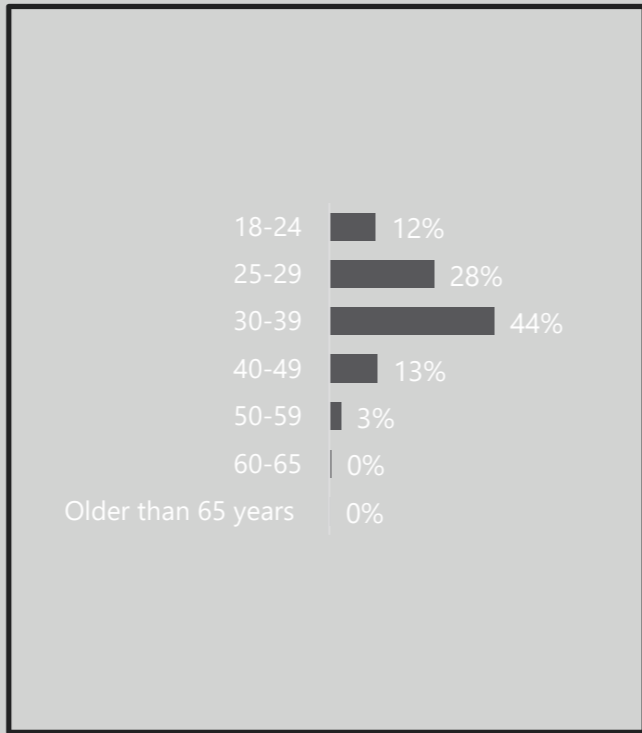
- People who want to have as much fun as possible in life
- People that like to do things spontaneously, impulsively
- People who likes to party
- People who are always looking to connect with others
- People who enjoy spending time with friends
- People who have an active and busy social life
- People for whom family comes first above all
- People who enjoy taking care of others
- People who have strong family values
- People who want to escape from the demands of life and relax and unwind
- People who needs time for themselves
- People who want to revitalize themselves
- People who make rational choices
- People who prefer the familiar over the unknown
- People who avoid risk
- People who are interested to learn more
- People who want to make a different choice
- People that like to do things the unconventional way
- People who want the best and are willing to pay for it
- People who like to have the best things, value high quality
- People who is sophisticated and classy
- People who like to explore and have new experiences
- People who like adventure
- People who wants a life changing experience



AND NOW THE RESULTS...

SAMPLE N = 2280

People that have been abroad for holiday last 3 years. Natural fall out.



2

THE IDEAL HOLIDAY EXPERIENCE

Category needs in the total German market

Potential needs and drivers
Holidays abroad

Main drivers in the market

EMOTIONAL BENEFITS

WHY do people go on holiday?



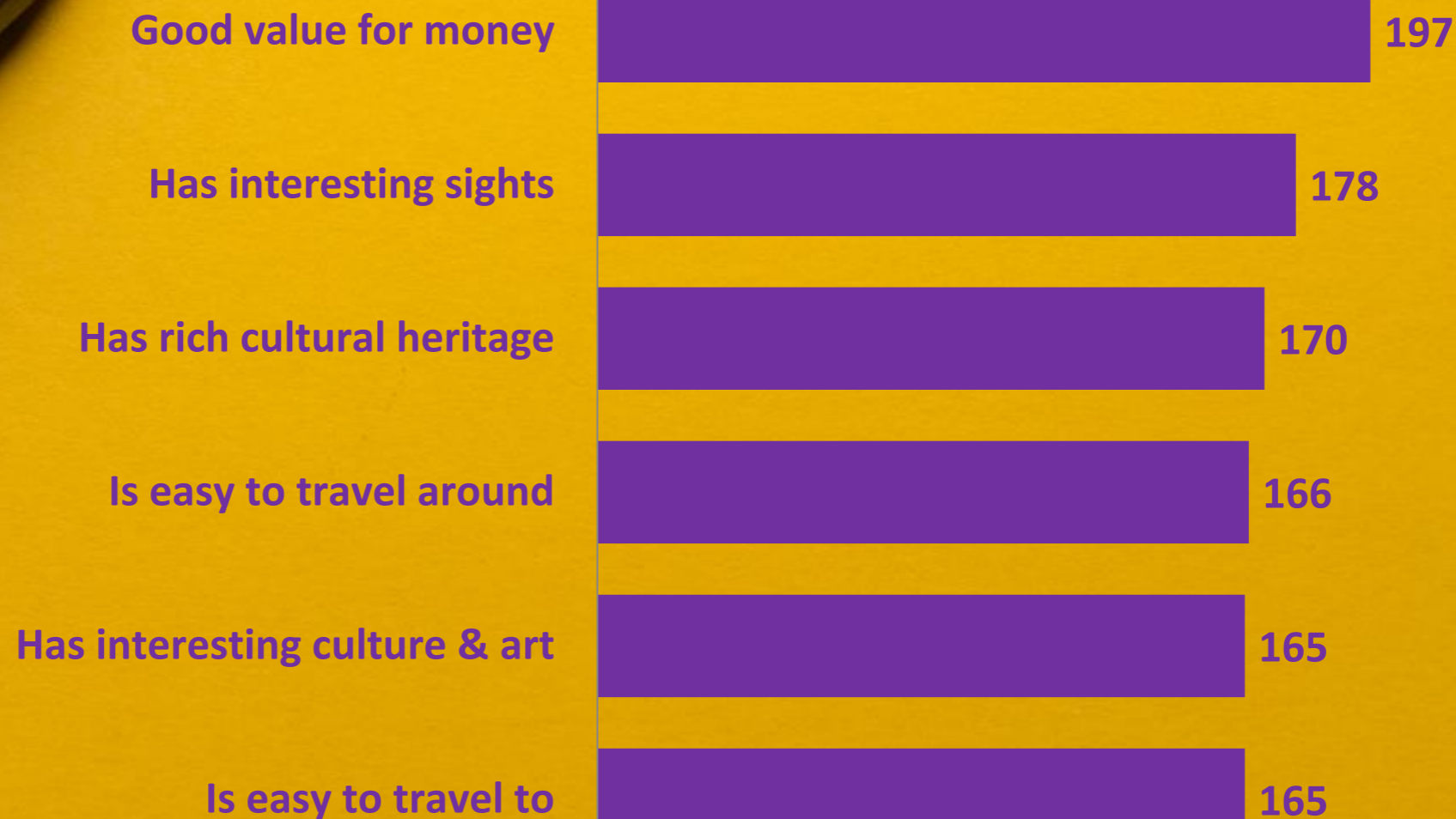
NOTE: Indexed vs. average of all items in facet
We report all items with a score which is 1 standard deviation higher than the average



IDEAL DESTINATION CHARACTERISTICS



WHAT expectations are related to specific destination characteristics?



NOTE: Indexed vs. average of all items in facet
We report all items with a score which is 1 standard deviation higher than the average



IDEAL BRAND PERSONALITY



WHAT should the destination stand for?



NOTE: Indexed vs. average of all items in facet
We report all items with a score which is 1 standard deviation higher than the average



IDEAL SOCIAL IDENTITY



HOW should a holiday reflect upon me?



NOTE: Indexed vs. average of all items in facet
We report all items with a score which is 1 standard deviation higher than the average





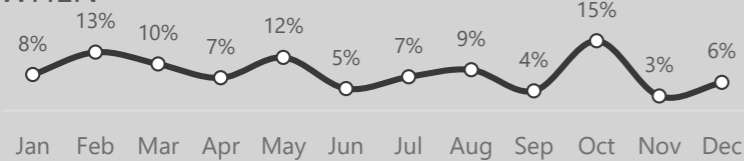
CATEGORY BEHAVIOR

With whom, how, when...

WHEN, WHO, HOW, WHERE

Highlights on Chinese category behavior

WHEN



People travel all year long
- Off course some peaks in summertime

WITH WHOM

64%

Spouse/partner

HOW

38%

I/we organized the trip myself/ourselves and travelled independently

TYPE OF ACCOMODATION

47%

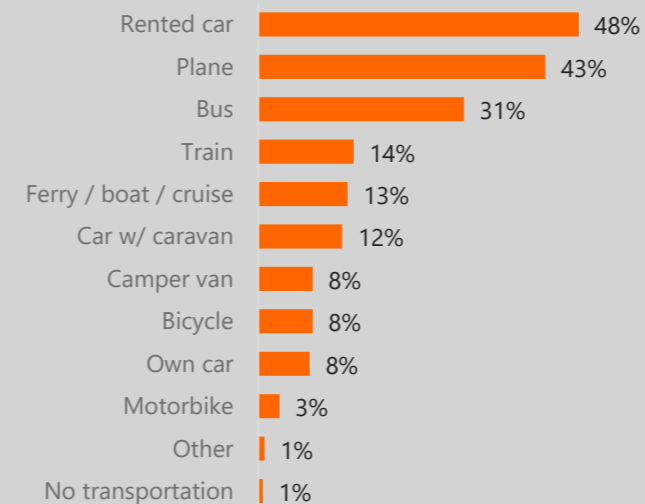
Lived at a medium standard hotel

TRANSPORTATION

83%

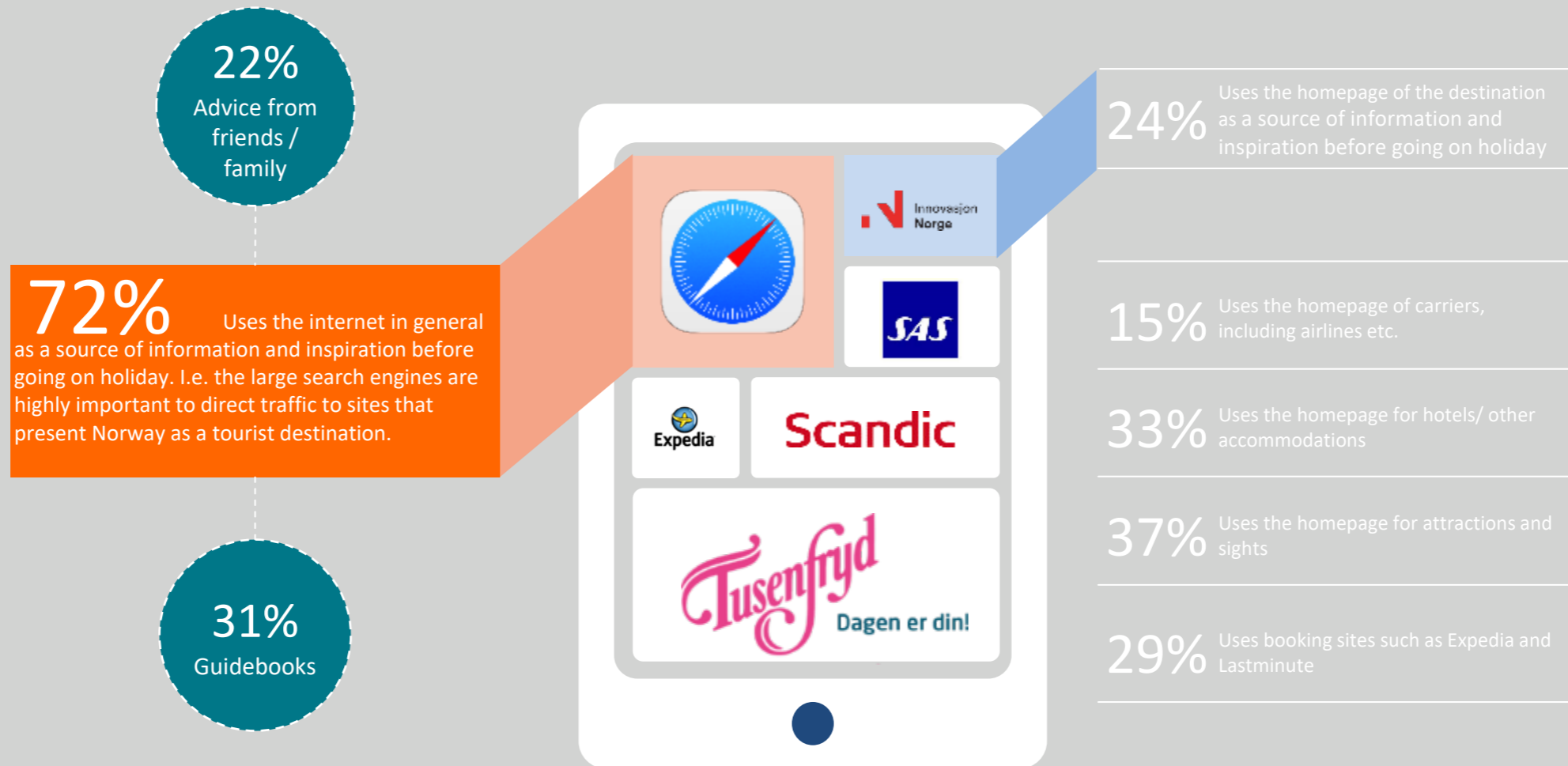
Travels by plane

TRANSPORTATION DURING THE HOLIDAY



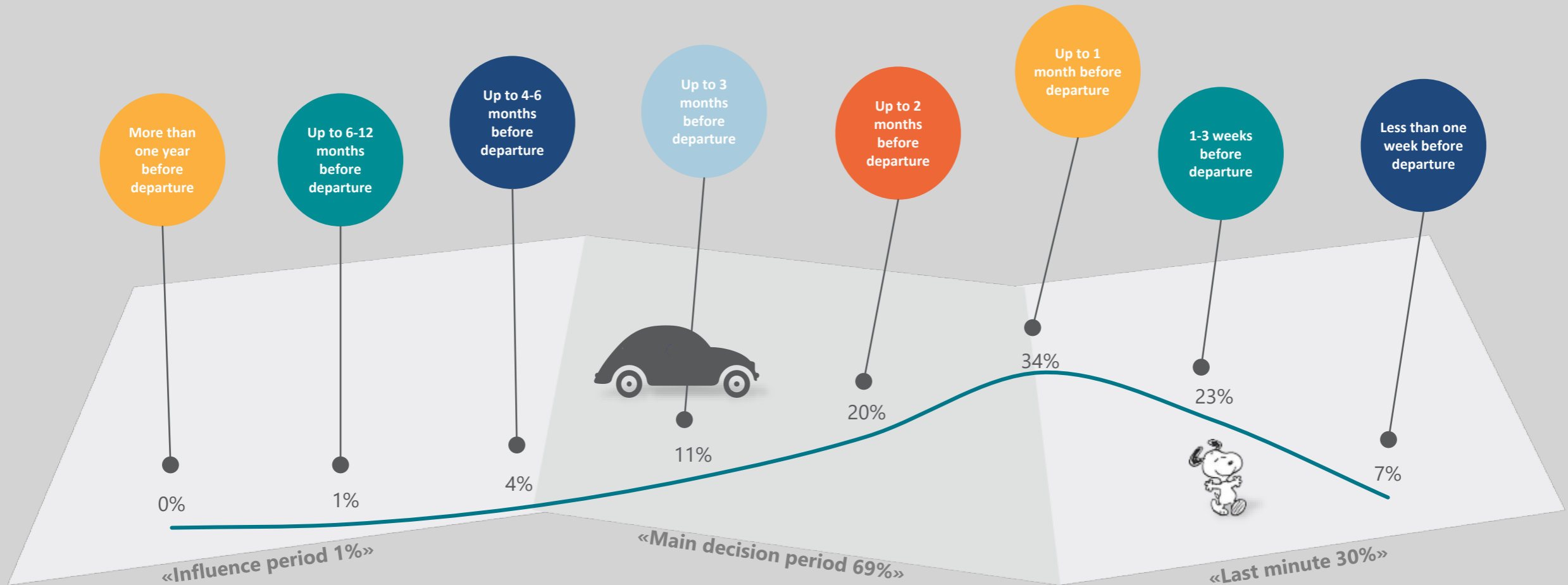
SOURCES OF INFORMATION BEFORE AND DURING TRAVEL

The digital channels are most important



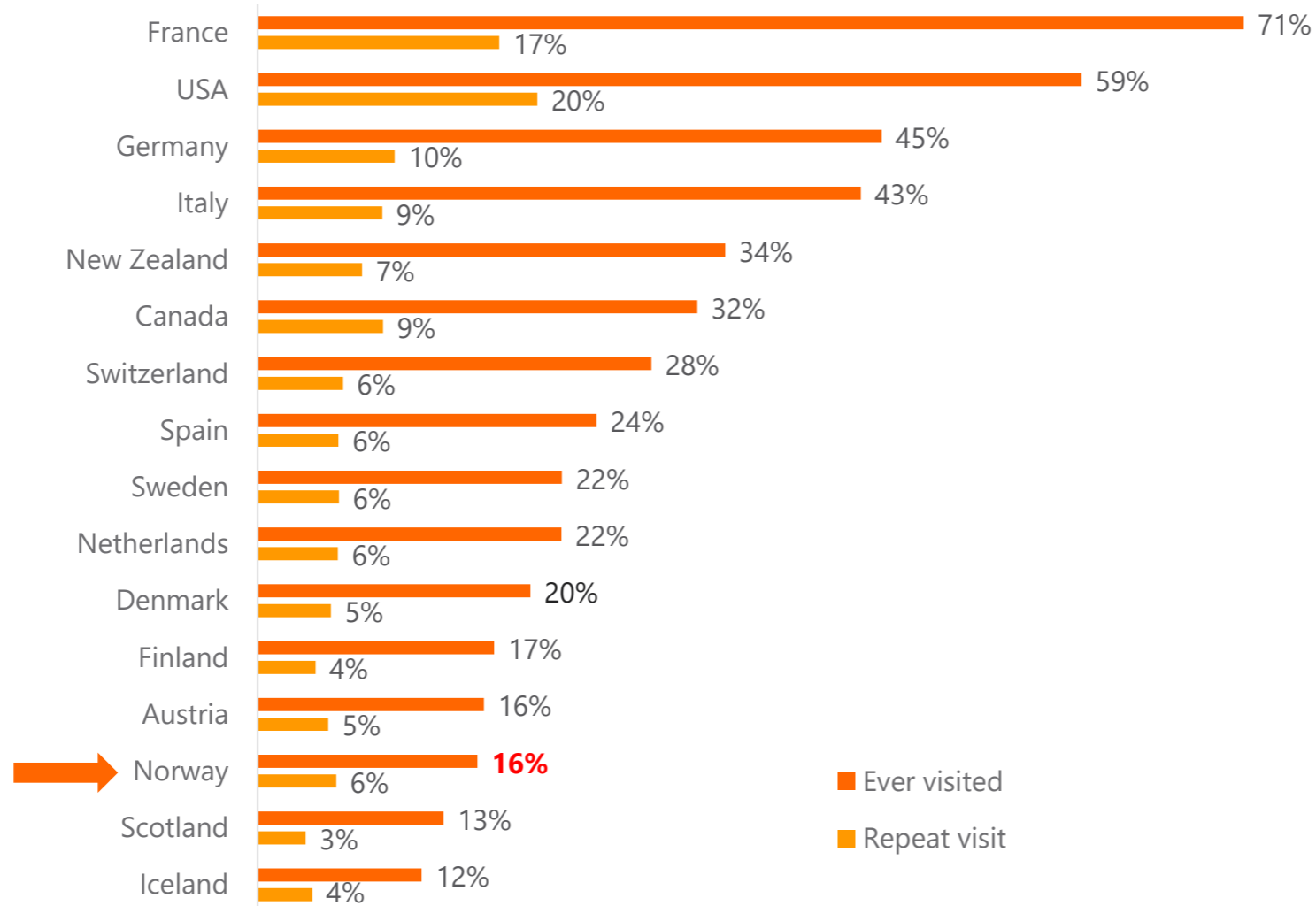
MOST TRAVELS ARE DECIDED UPON BETWEEN 1-6 MONTHS IN ADVANCE

How long before your departure did you settle for this trip on this occasion?



EVER VISITED THIS COUNTRY?

The Chinese goes to France



Visits to Norway all markets:

	Ever visited	Repeat visits	Repeat ratio
Global	32 %	18 %	55 %
US	25 %	11 %	43 %
UK	20 %	6 %	30 %
Denmark	81 %	62 %	76 %
Sweden	79 %	56 %	71 %
China	16 %	6 %	36 %
Spain	10 %	3 %	28 %
Italy	17 %	4 %	25 %
Netherlands	25 %	9 %	35 %
France	15 %	3 %	19 %
Germany	26 %	10 %	39 %



A NOTE ON PLANNING HORIZONS

China, US and Italy has shorter planning horizon than the rest of the markets

How long before your departure did you settle for this trip on this occasion?											
	Market										
	Global	US	UK	Denmark	Sweden	China	Spain	Italy	Netherlands	France	Germany
Antall intervju	21928	2158	2134	2192	2258	2280	2213	2168	2179	2205	2141
Less than 3 weeks before departure	18 %	24 %	8 %	12 %	12 %	30 %	12 %	44 %	13 %	13 %	10 %
Up to 3 months before departure	50 %	49 %	46 %	50 %	48 %	64 %	63 %	44 %	43 %	50 %	44 %
Up to 4-12 months before departure	28 %	23 %	40 %	35 %	36 %	5 %	23 %	6 %	41 %	33 %	42 %
More than one year before departure	1 %	3 %	3 %	1 %	3 %	0 %	1 %	0 %	1 %	2 %	2 %
Don't know	2 %	1 %	3 %	2 %	2 %	0 %	1 %	7 %	2 %	1 %	2 %

These differences will have impact on when to deploy marketing campaigns in the different markets

3

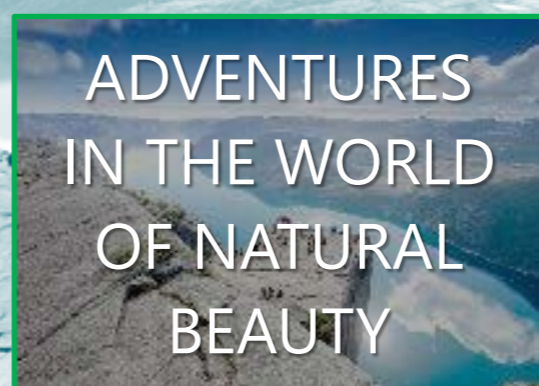
MOTIVATIONAL SEGMENTS

Why

What

Who

9 DISTINCT SEGMENTS



SEGMENT OVERVIEW AND SIZE*

PLAYFUL LIBERATION IS ALL ABOUT MAXIMIZING THE PLEASURE I GET OUT OF A HOLIDAY AND ENJOYING MYSELF WITHOUT WORRYING ABOUT THE CONSEQUENCES

ENERGY IS ABOUT ADVENTURE, BEING ACTIVE, TESTING YOUR BOUNDARIES AND DISCOVERING NEW THINGS. IT TAPS INTO THE NEED TO BE ENERGIZED.

SOCIAL IMMERSION IS ALL ABOUT WANTING TO BE HARMONIOUSLY CONNECTED WITH OTHER PEOPLE.

ROMANTIC LUXURY IS ABOUT THE NEED TO INDULGE IN SOME LUXURY. FIND THOSE ROMANTIC SPOTS THAT REALLY CREATES A FEELING OF EXTRAVAGANCE.

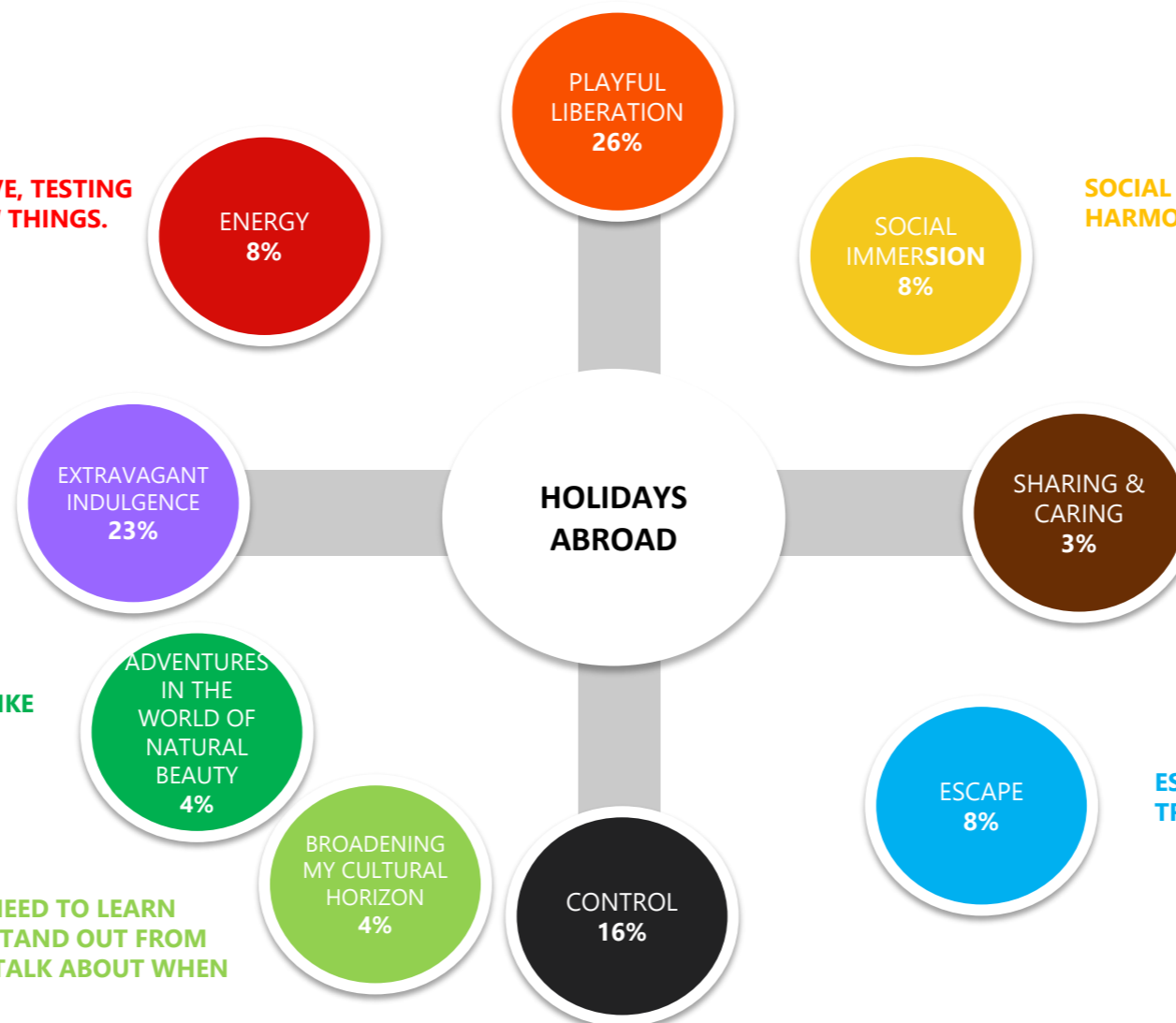
THE SEGMENT REFLECTS THE NEED TO SEE SOMETHING NEW, SOMETHING SPECTACULAR LIKE A NATURAL PHENOMENON. IT ALSO CONNECTS WITH THE NEED TO IMMERSE IN UNSPOILED NATURE AND TRAVEL TO A DESTINATION NOT RUINED BY TOURISM.

THE SEGMENT REFLECTS THE NEED TO LEARN ABOUT A FOREIGN CULTURE, STAND OUT FROM THE CROWD. SOMETHING TO TALK ABOUT WHEN COMING HOME.

CONTROL IS ABOUT AVOIDING SURPRISES AND SEEK THE FAMILIAR INSTEAD OF THE UNKNOWN.

ESCAPE IS ABOUT THE EXPERIENCE OF RETREAT, TRANQUILITY AND QUIETNESS

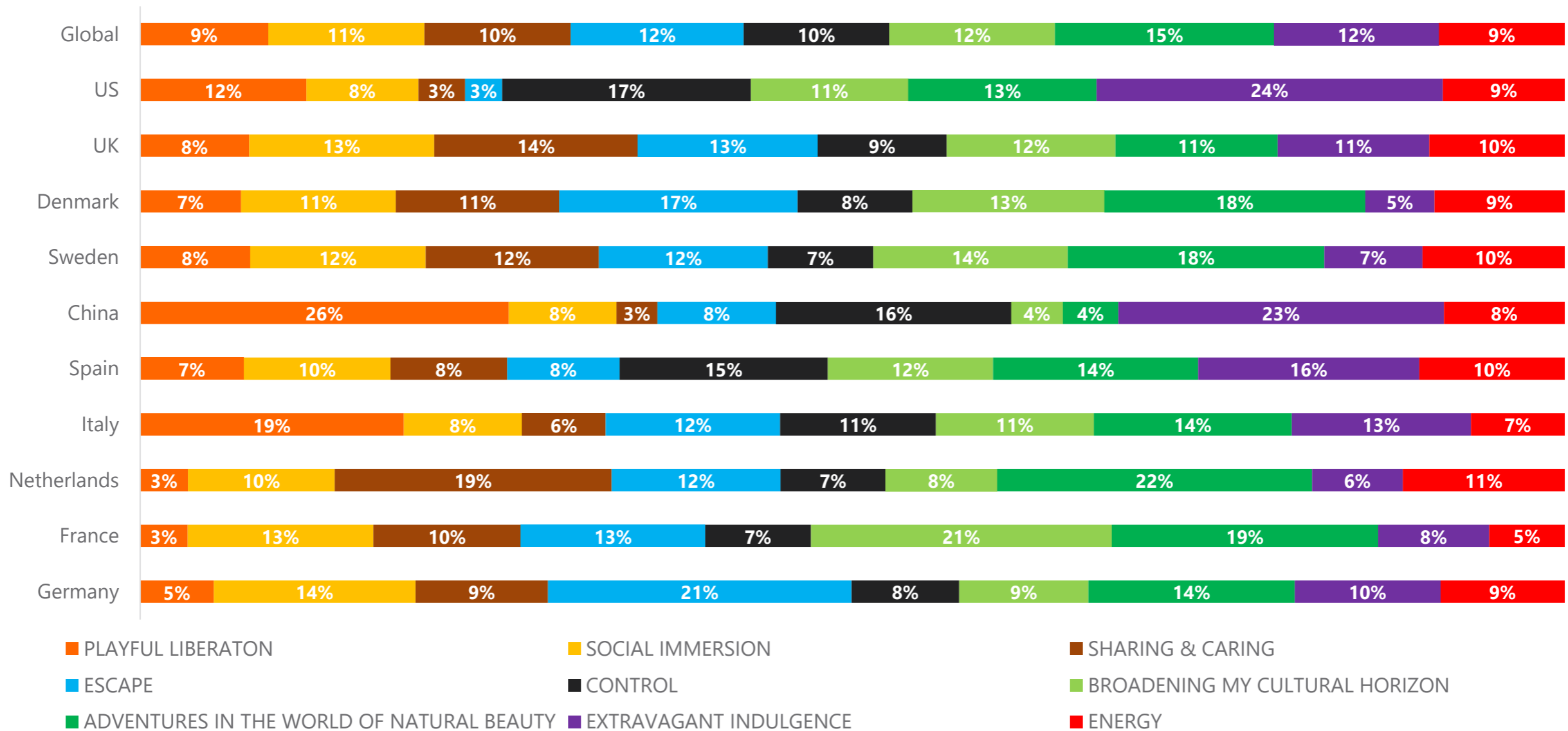
SHARING & CARING IS ALL ABOUT SPOILING MY LOVED ONES, INTENSIFY THE RELATIONSHIP AND CREATE PRECIOUS MOMENTS OF TOGETHERNESS



* *Share of overnight stays*: The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays



SEGMENT SIZE* PER MARKET



* Share of overnight stays: The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays.

SEGMENTS SHARE OF OCCASION – GLOBAL

- ALL DESTINATIONS

	Total	PLAYFUL LIBERATION	SOCIAL IMMERSION	SHARING & CARING	ESCAPE	CONTROL	BROADENING MY CULTURAL HORIZON	ADVENTURES IN THE WORLD OF NATURAL BEAUTY	EXTRAVAGANT INDULGENCE	ENERGY
# interviews	21928	2217	2202	2265	2574	2471	2828	2528	2780	2063
Visits to historic sites	57 %	57 %	61 %	42 %	47 %	56 %	72 %	66 %	58 %	53 %
Sun and beach holiday	53 %	58 %	48 %	57 %	63 %	52 %	37 %	49 %	59 %	57 %
Holiday to experience nature, scenery and wildlife	46 %	46 %	45 %	31 %	51 %	43 %	43 %	68 %	45 %	46 %
Sightseeing/round trip	45 %	49 %	48 %	34 %	36 %	46 %	48 %	52 %	49 %	45 %
Cultural experience (focus on art, theatre etc.)	42 %	49 %	43 %	26 %	29 %	43 %	54 %	45 %	48 %	40 %
City break (focusing on cultural, shopping, Club, restaurant visits etc.)	42 %	41 %	44 %	38 %	34 %	39 %	50 %	43 %	42 %	43 %
Visiting friends and relatives	31 %	28 %	37 %	42 %	26 %	31 %	27 %	33 %	30 %	32 %
Culinary trip	19 %	29 %	19 %	12 %	13 %	21 %	14 %	18 %	28 %	18 %
Party & fun	16 %	23 %	15 %	14 %	11 %	16 %	10 %	14 %	21 %	20 %
Sports/active holiday	15 %	17 %	10 %	10 %	10 %	19 %	7 %	20 %	20 %	27 %
Travel to cottage/holiday home (hired/own/borrowed cottage/holiday home)	15 %	13 %	12 %	18 %	20 %	15 %	8 %	13 %	17 %	16 %
Ski holiday	11 %	15 %	6 %	7 %	7 %	17 %	3 %	7 %	18 %	22 %
Event holiday (festivals, sports etc.)	10 %	14 %	9 %	6 %	5 %	13 %	5 %	9 %	16 %	11 %
Countryside holiday	10 %	12 %	9 %	8 %	12 %	10 %	6 %	11 %	10 %	9 %
Health travel	9 %	15 %	6 %	5 %	7 %	15 %	3 %	6 %	17 %	10 %
Other type of winter holiday with snow	7 %	10 %	4 %	3 %	4 %	12 %	2 %	6 %	13 %	10 %
Cruise	7 %	7 %	7 %	5 %	6 %	7 %	8 %	8 %	9 %	5 %

SEGMENTS SHARE OF OCCASION – CHINA

- ALL DESTINATIONS

	Total	PLAYFUL LIBERATION	SOCIAL IMMERSION	SHARING & CARING	ESCAPE	CONTROL	BROADENING MY CULTURAL HORIZON	ADVENTURES IN THE WORLD OF NATURAL BEAUTY	EXTRAVAGANT INDULGENCE	ENERGY
# interviews	2280	604	155	65	200	370	86	89	516	195
Holiday to experience nature, scenery and wildlife	68 %	73 %	69 %	71 %	68 %	67 %	66 %	70 %	65 %	64 %
Sightseeing/round trip	68 %	66 %	71 %	74 %	72 %	66 %	69 %	70 %	69 %	62 %
Visits to historic sites	66 %	69 %	65 %	65 %	66 %	66 %	80 %	71 %	64 %	61 %
Cultural experience (focus on art, theatre etc)	62 %	65 %	65 %	63 %	57 %	64 %	67 %	60 %	62 %	55 %
Sun and beach holiday	60 %	60 %	52 %	65 %	62 %	57 %	51 %	66 %	61 %	64 %
Culinary trip	56 %	58 %	63 %	57 %	47 %	54 %	60 %	66 %	55 %	51 %
City break (focusing on cultural, shopping, Club, restaurant visits etc.)	47 %	51 %	45 %	57 %	51 %	41 %	47 %	47 %	45 %	46 %
Health travel	31 %	25 %	28 %	29 %	24 %	35 %	23 %	40 %	35 %	38 %
Ski holiday	24 %	22 %	19 %	29 %	17 %	27 %	13 %	33 %	27 %	30 %
Other type of winterholiday with snow	21 %	17 %	17 %	23 %	15 %	28 %	14 %	17 %	22 %	25 %
Sports/active holiday	20 %	16 %	15 %	18 %	8 %	28 %	15 %	27 %	25 %	21 %
Countryside holiday	20 %	22 %	24 %	26 %	21 %	16 %	13 %	22 %	17 %	22 %
Travel to cottage/holiday home (hired/own/borrowed cottage/holiday home)	17 %	15 %	17 %	11 %	12 %	17 %	7 %	22 %	22 %	17 %
Visiting friends and relatives	16 %	15 %	17 %	18 %	11 %	21 %	7 %	17 %	17 %	16 %
Event holiday (festivals, sports etc)	16 %	15 %	15 %	12 %	11 %	21 %	9 %	25 %	18 %	16 %
Party&fun	15 %	13 %	10 %	17 %	11 %	17 %	9 %	19 %	18 %	14 %
Cruise	7 %	7 %	6 %	3 %	6 %	5 %	3 %	15 %	9 %	4 %



MAJOR CHANGES IN THE GLOBAL SEGMENTATION VS LAST TIME

NUMBER OF SEGMENTS

This time we have 9 decent sized segments, last there were 8. I.e. we see a more fragmented picture of holiday needs this time.

NEW MEANING OF THE BLUE SEGMENT

In the last segmentation the meaning of the blue segment was more in the direction of a «spa center» experience. This time it's more about retreating to a quiet place. This could be a quite fisherman's cottage in Lofoten or a cabin in the mountains.

THE PREVIOUS RED AND GREEN SEGMENTS ARE DIVIDED

In stead of a pure "Exploration" segment and one "Broadening my horizon" segment, we have a red segment (Energy), all about activity and a two green segments (Adventures in the world of natural beauty) all about unspoiled nature, and "Broadening my cultural horizon" all about experiencing culture.





PLAYFUL LIBERATION

PLAYFUL AND FRESH

PARTY AND FUN

Playful Liberation is all about **maximizing the pleasure** I get out of a holiday and **enjoying** myself **without worrying** about the consequences. I go a little crazy, overindulge myself and **lose all inhibitions**. I am spontaneous, follow my instincts and live for the moment. The purpose of the holiday is abundance and enjoyment. It is **impulsive** and sometimes excessive or **even manic**.

PLAYFUL LIBERATION

SOMETIMES I NEED TO LET GO. ENJOY LIFE TO THE FULLEST AND FEEL COMPLETELY LIBERATED. I NEED TO REFILL MY ENERGY AND PAMPER MYSELF. ITS ALL ABOUT ME.



EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

The core meaning of going on holiday is to feel **completely liberated** and allow me to **pamper myself**.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place with **interesting culture & art**, a place that allows me to **live close to nature** and which have **interesting sites**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **playful fresh** and relaxed.

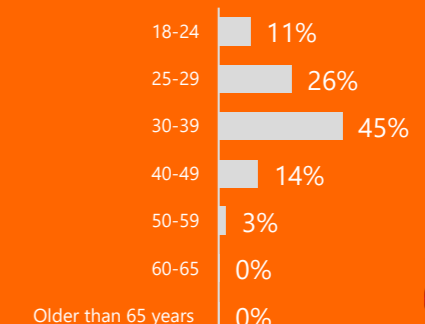
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who things **spontaneously** and **impulsively**. The kind that wants to **have as much fun as possible** in life. More or less people that like to **party**.

82%
ARE BELOW
40 YEARS



SHARE OF
OVERNIGHT
STAYS
26%



PLAYFUL LIBERATION

TYPICAL HOLIDAY OCCASIONS

Of course you will find the typical sun and beach vacation in this segment, but you will also find **holidays to experience nature, scenery and wildlife** and **city breaks**. Although, most of the time it's all about **party and fun!**

I TRAVEL TO FEEL GOOD

These consumers choose destinations that makes them **feel good**. They want to party, and **enjoy** themselves in the **company of others**. They want to travel to places that are **playful, fresh** and **relaxed**. They want to have a informal, fun and relaxed holiday at the same time.

THE ROLE OF BRANDS

The segment is important for brands/destinations which wish to position themselves as **hedonistic** and **pleasure-seeking** (or giving); and for brands which will position themselves in the space of sensuality, sexuality and sensory enjoyment.

HOLIDAY EXPERIENCE

These consumers are **spontaneous travellers**. They have their favourite spots, but they are driven by the **"feel good factor"** of what they see in social media or guide books. They are also acting more on advice from friends and family than the other segments. They would rather stay at home than travel without friends, and will often end up going somewhere if their friends tell them.

SOURCES OF INSPIRATIONS

These consumers **don't spend a lot of time planning** where to go. Most of them settle for the trip **less than four weeks** before they go (65%). They act on what catches their eye in **social media** or on **guide books**. It's more like "in the spur of the moment", a typical **"last minute booker"**. **Friends and acquaintances** heavily influences their choice.



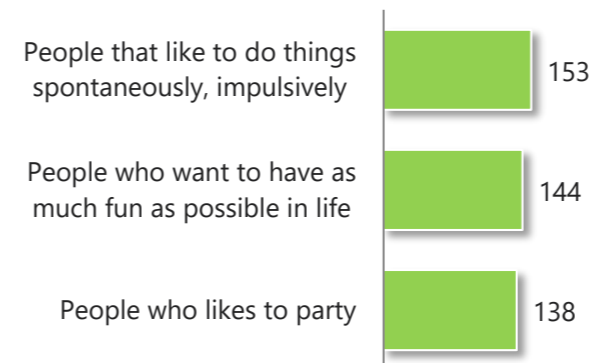
PLAYFUL LIBERATION - ACTIVE, RELAXED AND FRESH

Core motivations

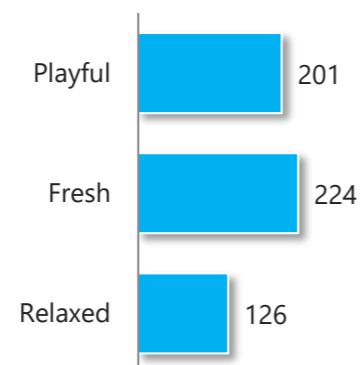
Emotional Benefits



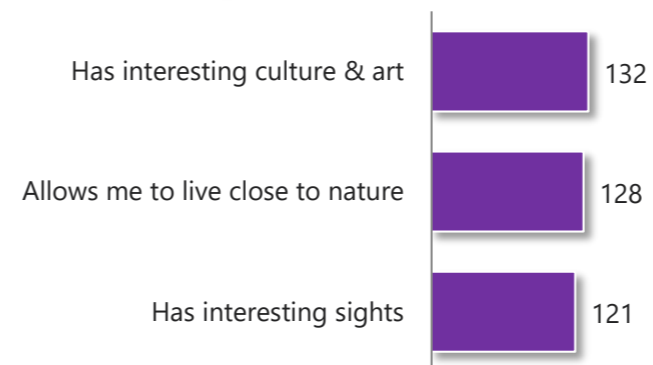
Social Identity



Personality



Destination features



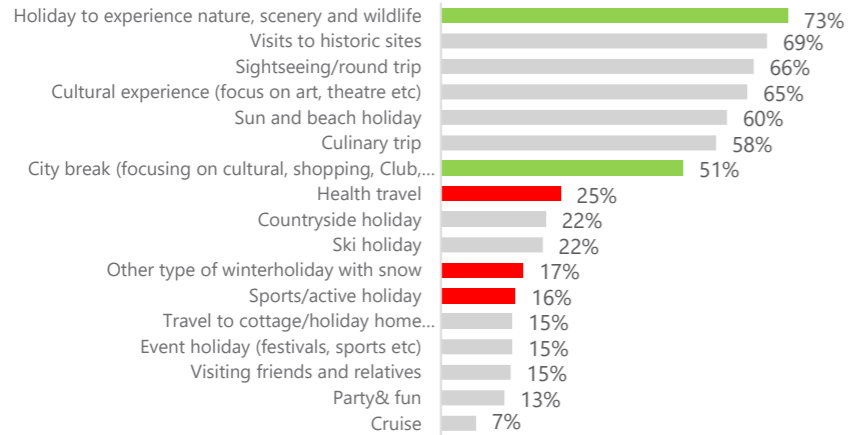
SEGMENT PROFILE – PLAYFUL LIBERATION

■ Significantly over indexed in segment
■ Significantly under indexed in segment

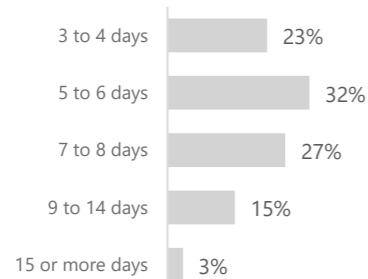
TYOLOGY



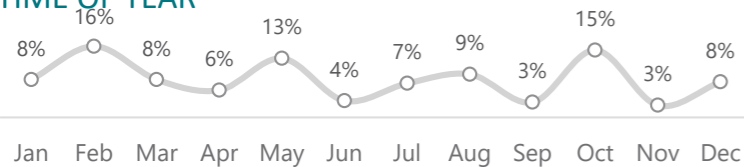
TYPE OF HOLIDAY



DURATION



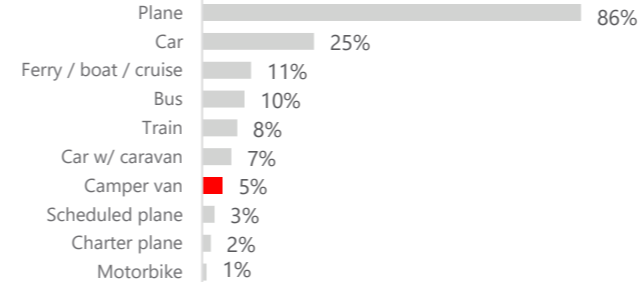
TIME OF YEAR



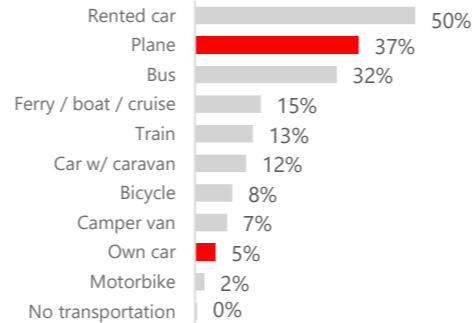
TRANSPORT AND ACOMMODATION



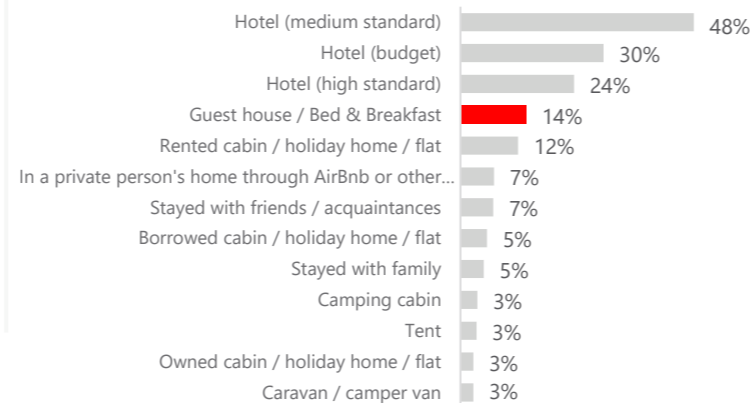
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



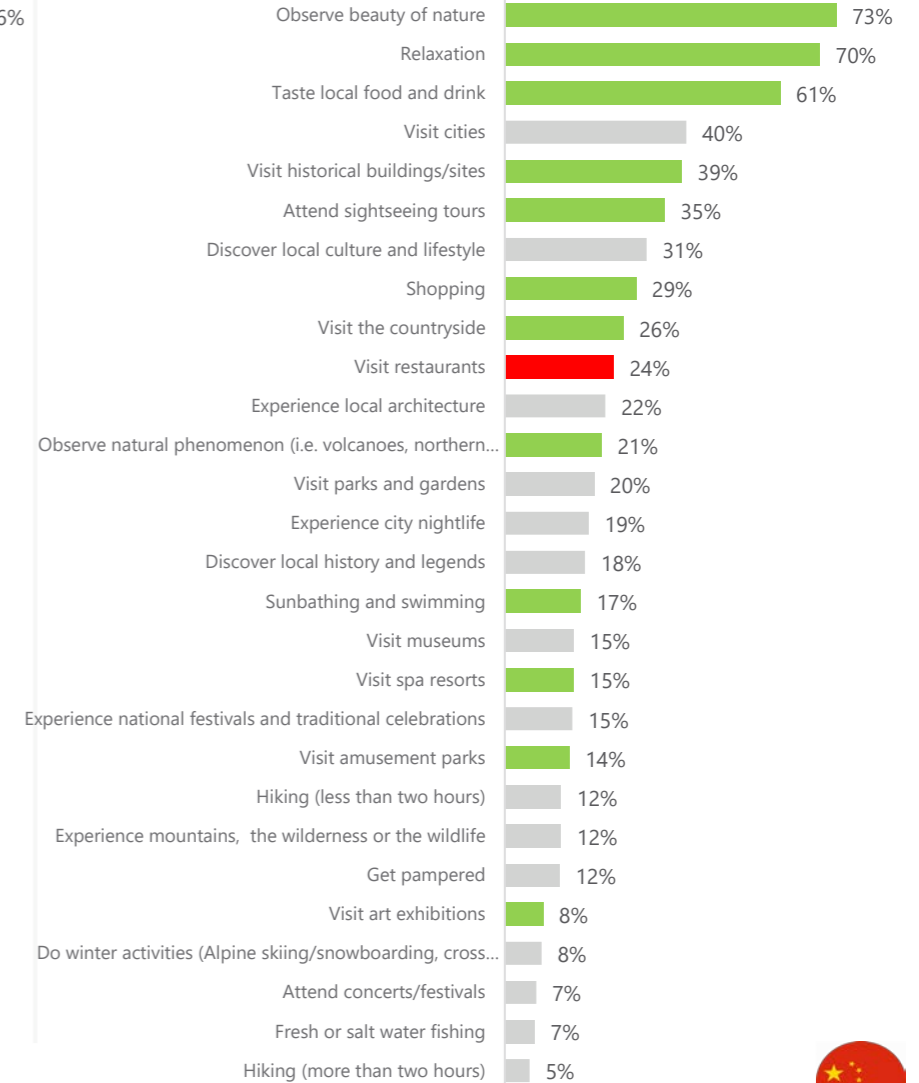
ACCOMMODATION



ACTIVITIES



ACTIVITIES



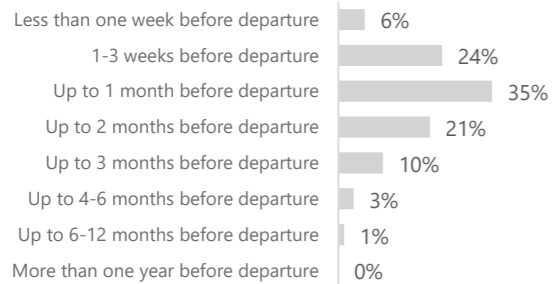
SEGMENT PROFILE - PLAYFUL LIBERATION

■ Significantly over indexed in segment
■ Significantly under indexed in segment

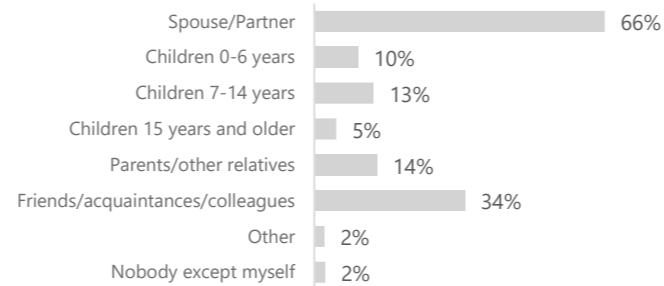
PLANNING



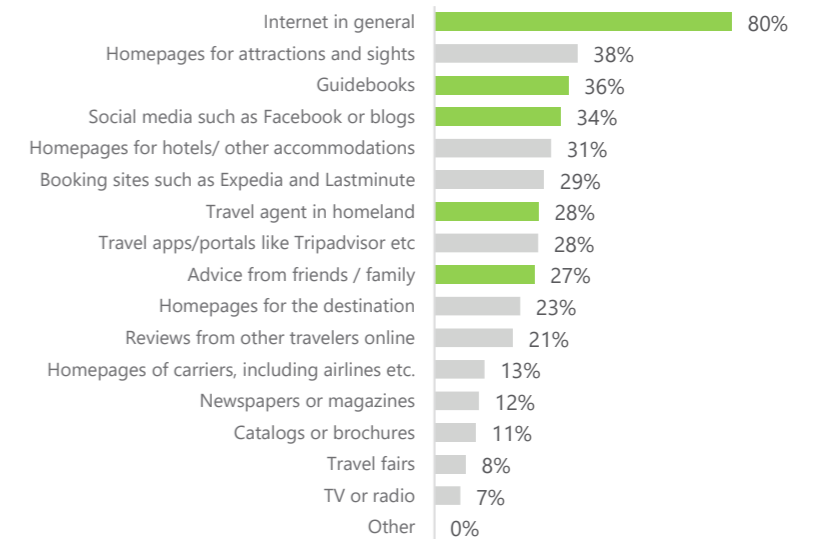
DECISION MADE



INFLUENCERS



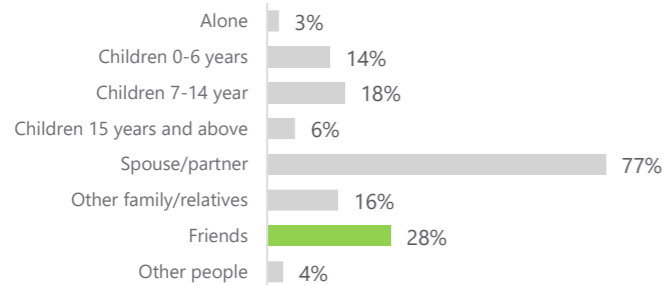
INFORMATION SOURCES



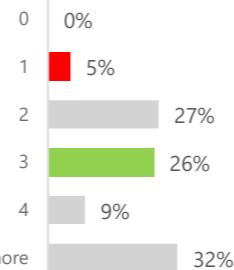
TRAVEL COMPANIONS



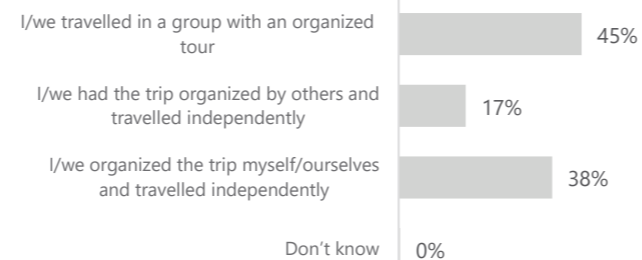
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

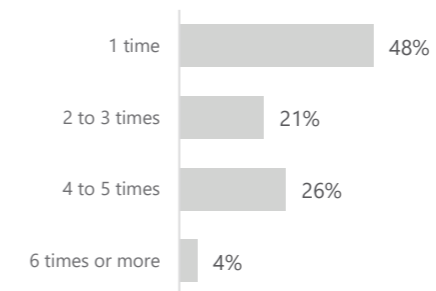


HOW DID YOU TRAVEL

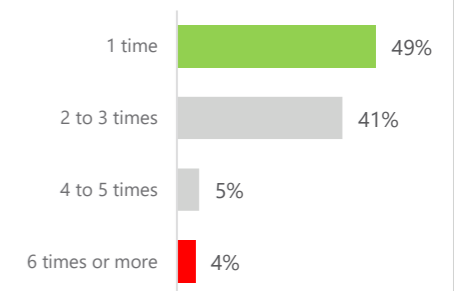


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





SOCIAL IMMERSION

Sociable and open-
minded

Meet local people,
eat local cuisine

Social immersion is all about wanting to be harmoniously **connected** with other people. For me, meeting people is a joy. I love having **good times with good friends** and opening up and **meeting new people**.

SOCIAL IMMERSION

SOMETIMES I NEED TO IMMERSE MYSELF INTO LOCAL LIFE, MEET NEW PEOPLE AND EAT LOCAL CUISINE

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

The core meaning of going on holiday is to **immerse myself in the local life** and too **meet new people**. I want to go a place where I can broaden my knowledge. A place that enriches my view on the world and give me rich experiences. I also want a holiday to allow me to intensify the relationship with my loved ones.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to destinations that has good opportunities to **meet local people**. It needs to be known for its friendly people. I want **good local cuisine** and interesting **sight**. **Good shopping** and interesting **culture** & art is also of importance.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **sociable**, outgoing, friendly, **open-minded**, caring, explorative and cultivated.

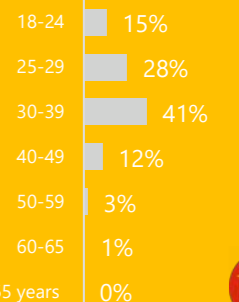
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who are always **looking to connect with others**. People who enjoy an **spending time with friends**. People who like to **explore** and have **new experiences** and which have an **active and busy social life**.

84%
ARE UNDER
40 YEARS



SHARE OF
OVERNIGHT
STAYS
8%



SOCIAL IMMERSION

TYPICAL HOLIDAY OCCASIONS

In this segment you will find sightseeing/round trips and holidays to experience nature, scenery and wildlife. There are of course some sun & beach holidays here but moreover you will find holidays to culture and nature.

I TRAVEL TO MEET THE LOCALS

These consumers want to **taste local food and drink**. They want to visit cities and **discover local culture and lifestyle**.. **Shopping** and experience **national festivals and traditional celebrations** are also most appreciated.

THE ROLE OF BRANDS

The segment is important for brands which try to position themselves as **enhancers of friendships**, as **social brands** which help bring **people** together, and brands which are **open, inclusive**, and seeking to reflect **shared pleasures**. It is important for brands which seek to support collaboration with their customers.

HOLIDAY EXPERIENCE

These consumers get their trip organized by others and **travels independently**. They often travel with their partner or with **friends** and seek a **social experience** in a new to them culture. They want to immerse themselves in **local life and culture**, connect with others and **spend time with friends**.

SOURCES OF INSPIRATIONS

Most of these consumers make their decision **less than 4 weeks before their departure** (66%). They browse the **Internet** in general or uses **guidebooks** to get inspiration. Their **spouse/partner** heavily influences their choice.



SOCIAL IMMERSION - ACTIVE, RELAXED AND FRESH

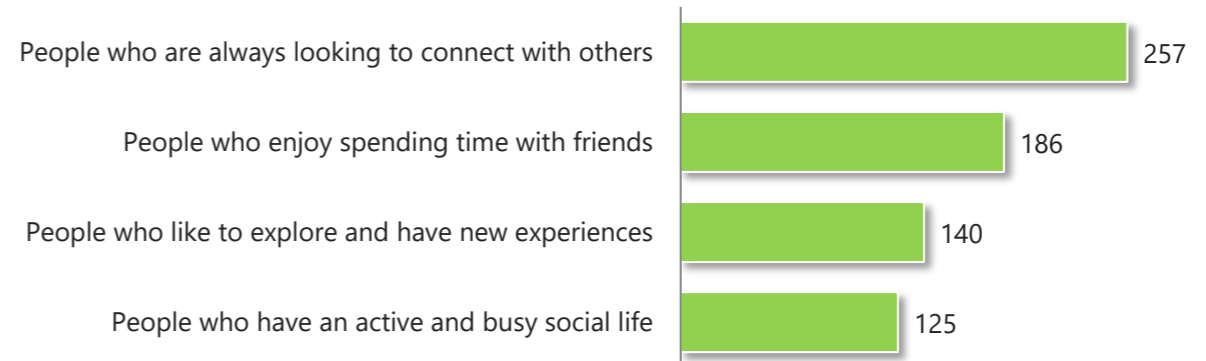
Core motivations



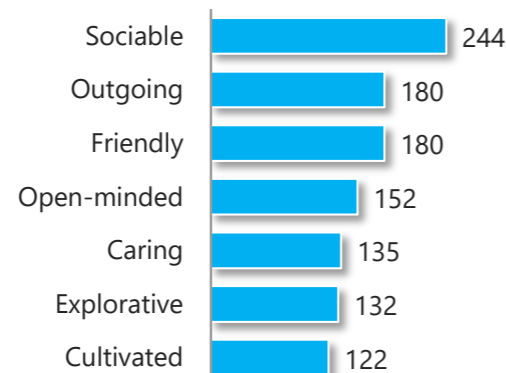
Emotional Benefits



Social Identity



Personality



Destination features



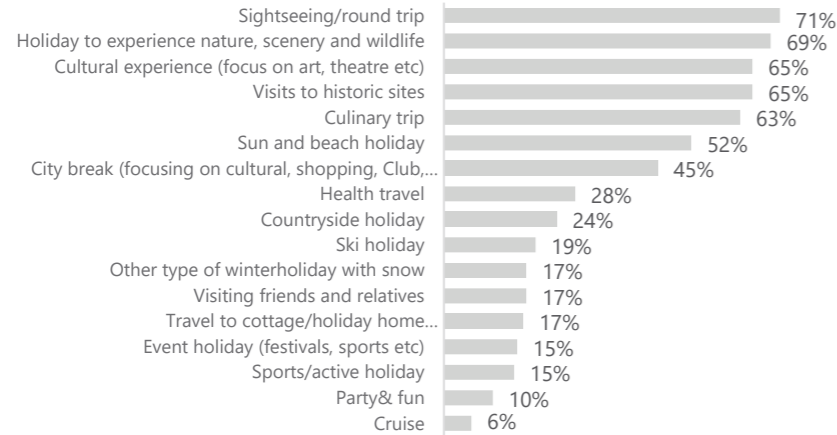
SEGMENT PROFILE – SOCIAL IMMERSION

■ Significantly over indexed in segment
■ Significantly under indexed in segment

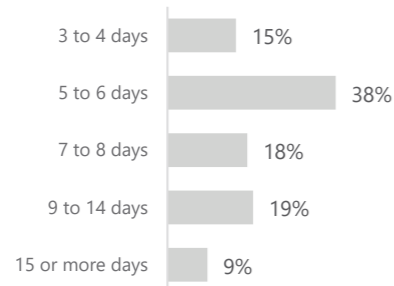
TYOLOGY



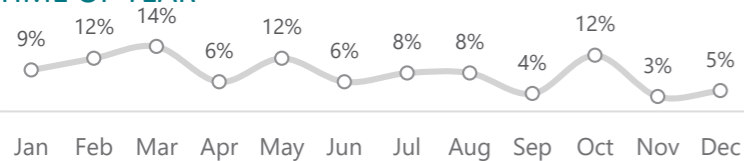
TYPE OF HOLIDAY



DURATION



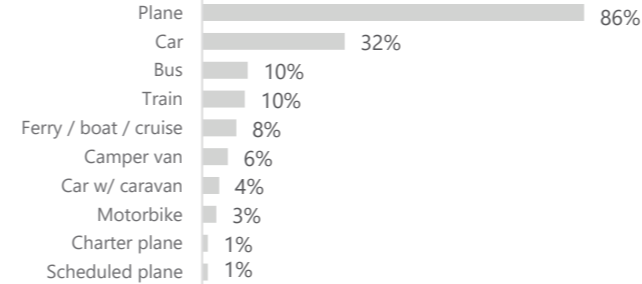
TIME OF YEAR



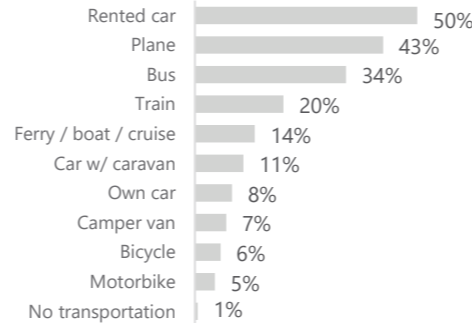
TRANSPORT AND ACOMMODATION



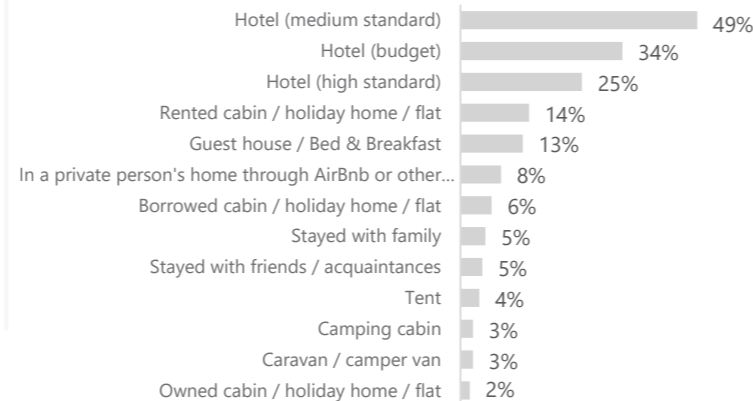
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



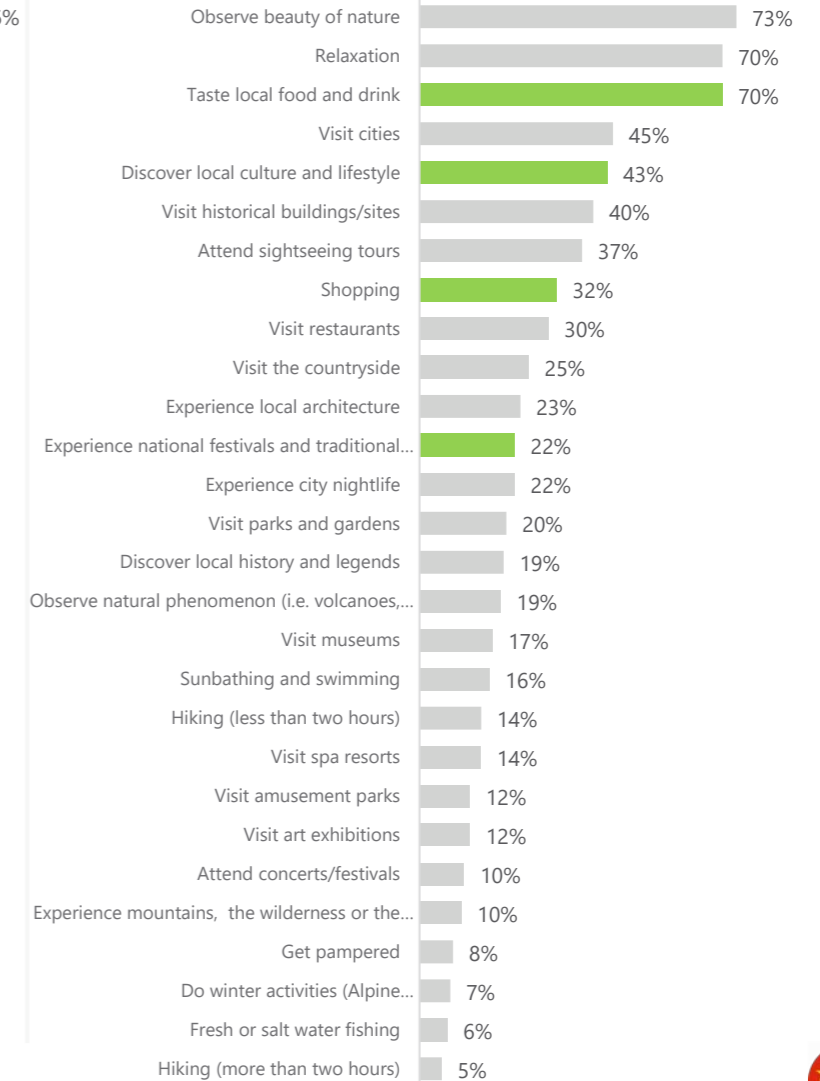
ACCOMMODATION



ACTIVITIES



ACTIVITIES



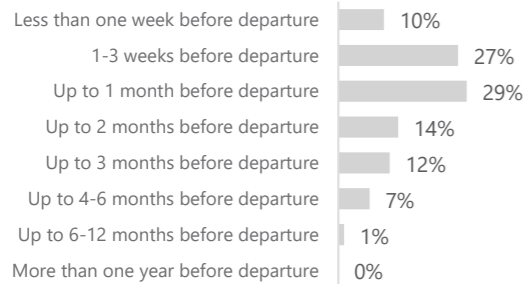
SEGMENT PROFILE - SOCIAL IMMERSION

■ Significantly over indexed in segment
■ Significantly under indexed in segment

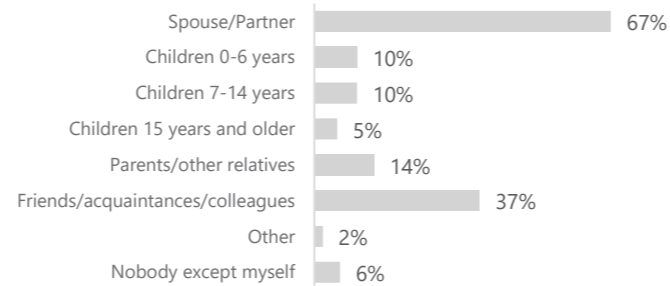
PLANNING



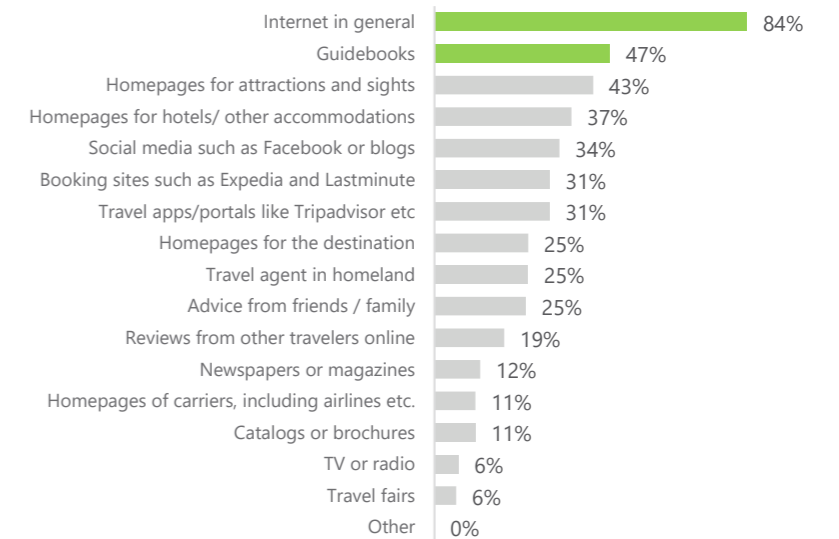
DECISION MADE



INFLUENCERS



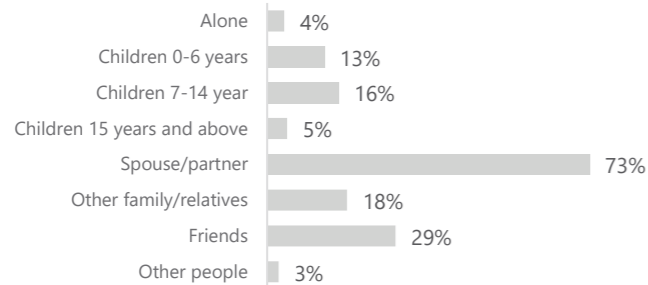
INFORMATION SOURCES



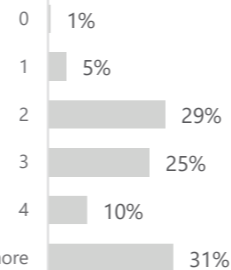
TRAVEL COMPANIONS



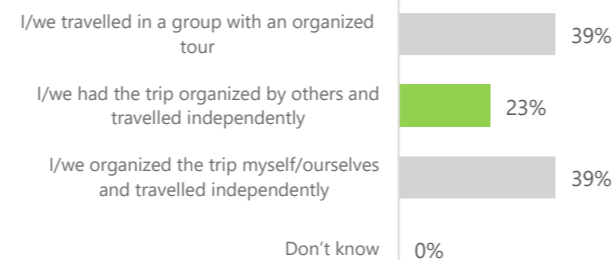
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

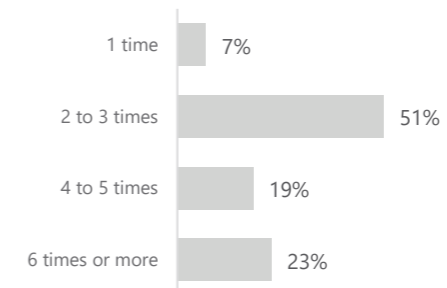


HOW DID YOU TRAVEL

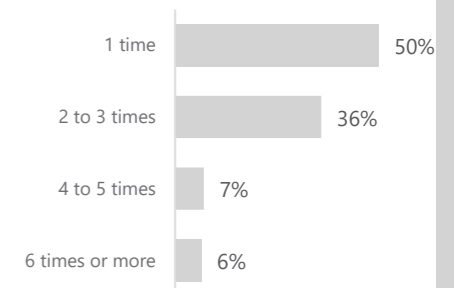


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





SHARING AND CARING

Sociable and friendly

Precious moments of
togetherness

Sharing and caring is all about being surrounded by people who accept me as I am, as an equal and who make me feel welcome. Sharing and caring is about the need to **be part of** society or **a group** we really feel part of. Part of this is linked to following norms and traditions just because we are part of that culture or group. It is about **togetherness**, brotherhood, camaraderie, **taking care of others**, being taken care of by others, and doing and feeling good.

SHARING AND CARING



SOMETIMES I NEED TO SPOIL MY LOVED ONES AND CREATE PRECIOUS MOMENTS OF TOGETHERNESS. MY FAMILY COMES FIRST ABOVE ALL.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

The core meaning of going on holiday is to **spoil my loved ones**. I want to intensify the relationship with my loved one(s) and create **precious moments of togetherness**. We want to share good times and escape from my hectic daily life.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

It has to be a destination that is **easy to travel to**. It should have friendly people, good service and be easy to travel around. I want good **value for money** and we would like to enjoy good local cuisine.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **sociable, friendly**, relaxed, cozy, harmonious and peaceful.

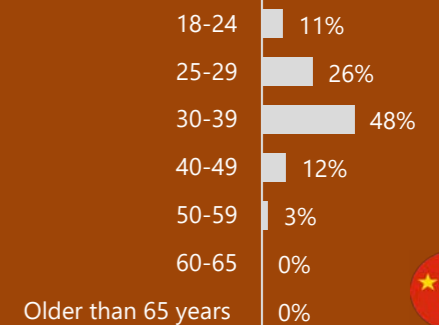
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people for whom **family comes first above all**. This is people who enjoy **taking care of others** and have strong family values. People who enjoy spending time with friends.

85%
ARE UNDER
40 YEARS



SHARE OF
OVERNIGHT
STAYS
3%



SHARING AND CARING

TYPICAL HOLIDAY OCCASIONS

In this segment you will find holidays to do sightseeing/round trips and travels to experience nature, scenery and wildlife. You also find the typical sun and beach holiday as well.

I TRAVEL TO FEEL INCLUDED

These consumers choose destinations that enables them to **spend time with their loved ones**. They want to travel to places that are **sociable, friendly** and **relaxed**. They want to create those **precious moments of togetherness**.

THE ROLE OF BRANDS

Brands that want to tap into the needs in this segment should focus on **support, empathy, care giving** and true, deep **friendships**. They should position themselves as familiar and appealing to a broader audience and tap into those feelings that people get when they feel **warm, included** and **accepted** by the people or tribe they are with.

HOLIDAY EXPERIENCE

Relaxation is on top of the list. Activities like taste local food and drinks and observe the beauty of nature is also appreciated by this segment. They over index on sightseeing tours and winter activities (Alpine skiing/snowboard, cross country skiing, dog-sleigh, snowmobile etc). They like to as long as the activities are slow and friendly. No pushing boundaries please!

SOURCES OF INSPIRATIONS

Internet in general is the main source of inspiration. They also act on information from guidebooks, social media and travel apps like TripAdvisor. **Parents and friends** heavily influences their choice. They often travel in a group with an organized trip.

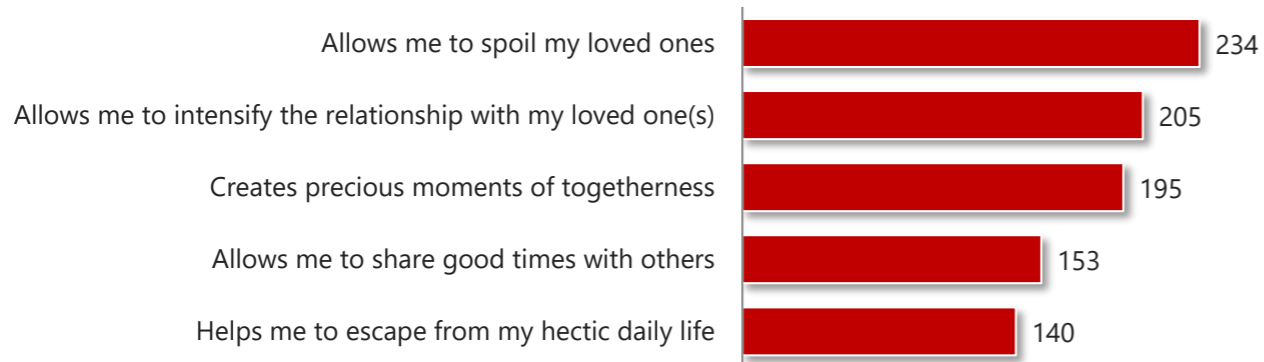


SHARING AND CARING

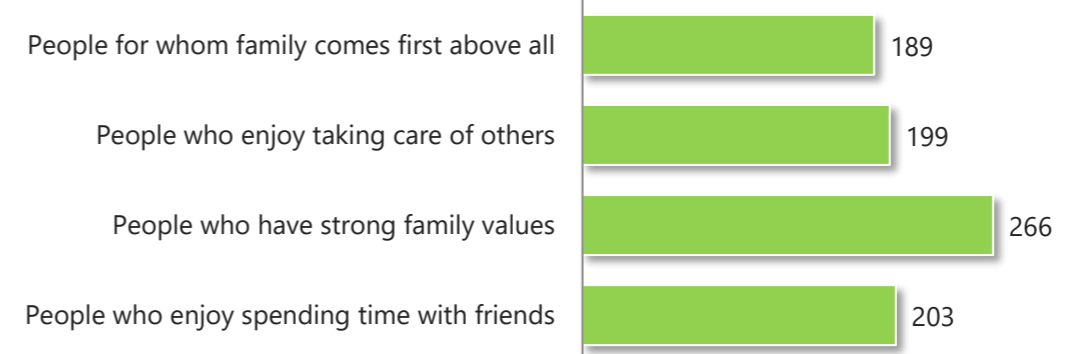
Core motivations



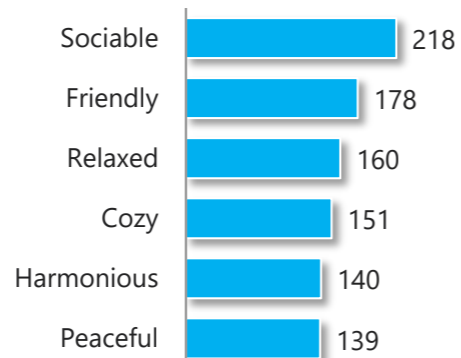
Emotional Benefits



Social Identity



Personality



Destination features



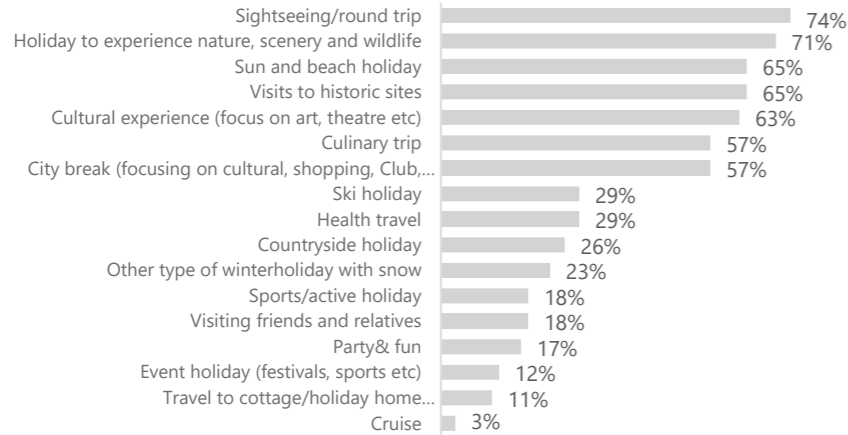
SEGMENT PROFILE – SHARING AND CARING

■ Significantly over indexed in segment
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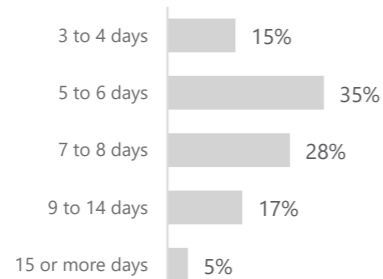
TYOLOGY



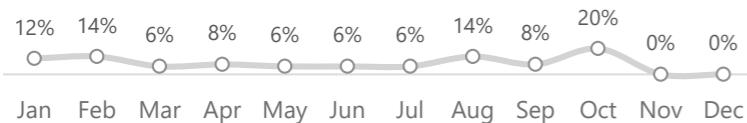
TYPE OF HOLIDAY



DURATION



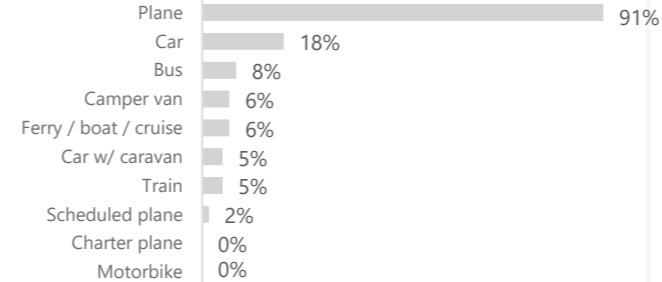
TIME OF YEAR



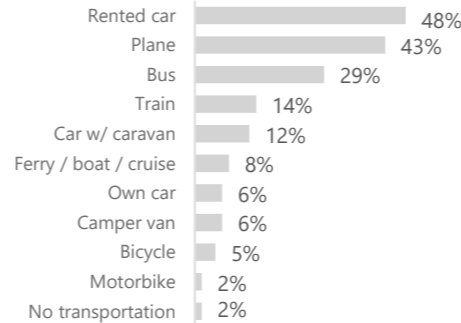
TRANSPORT AND ACOMMODATION



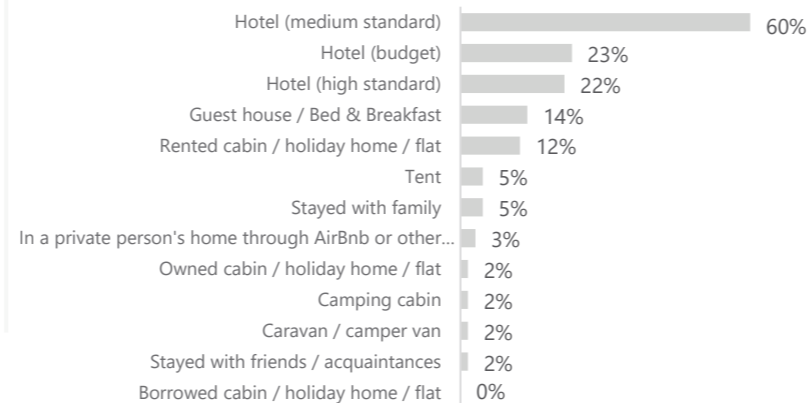
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



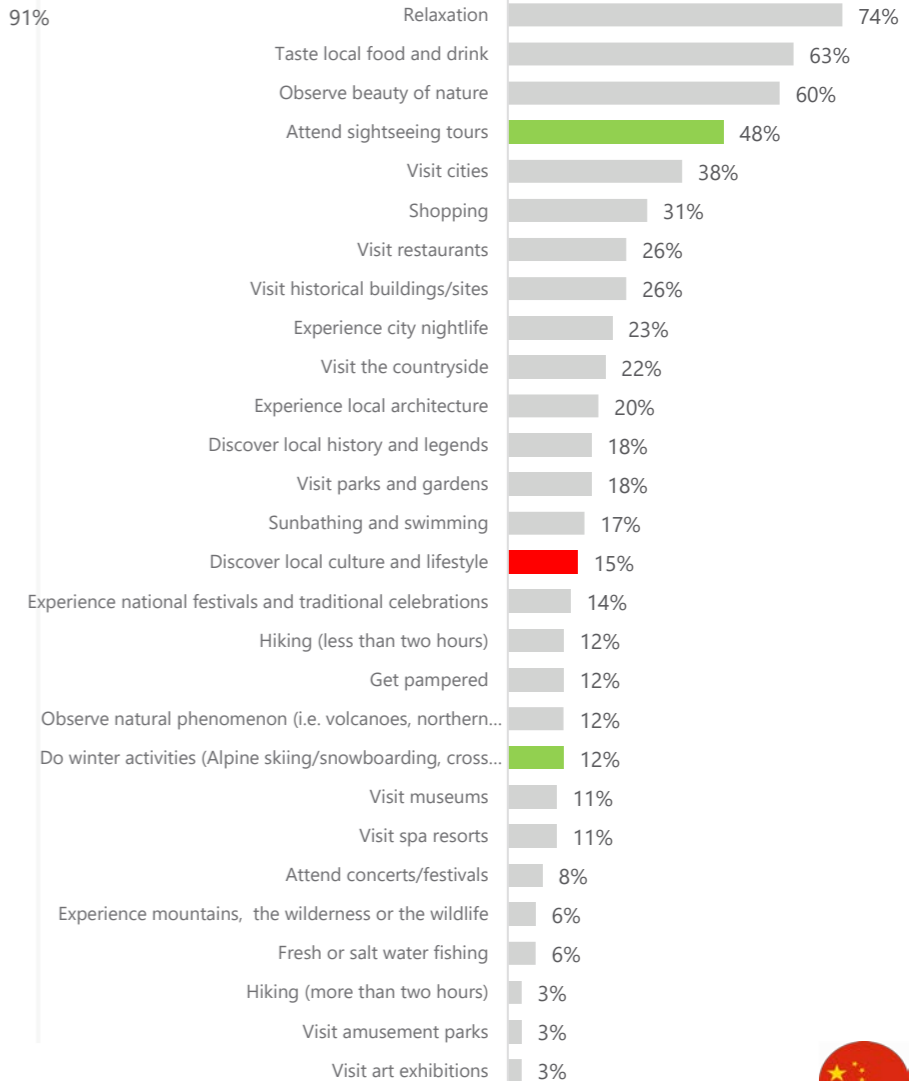
ACCOMMODATION



ACTIVITIES



ACTIVITIES



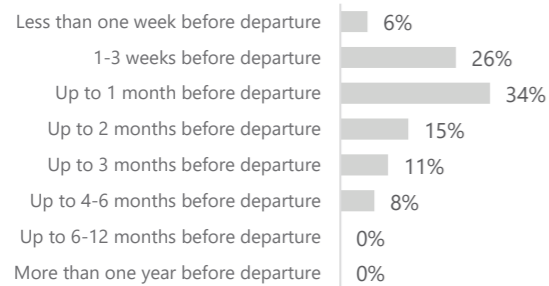
SEGMENT PROFILE - SHARING AND CARING

■ Significantly over indexed in segment
■ Significantly under indexed in segment

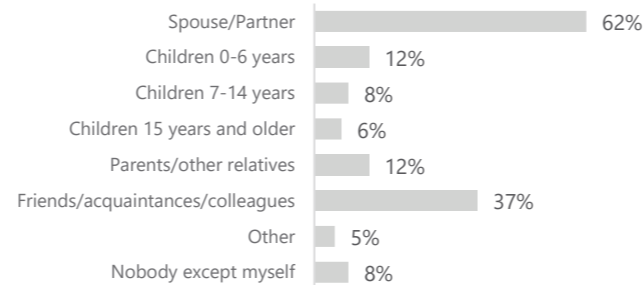
PLANNING



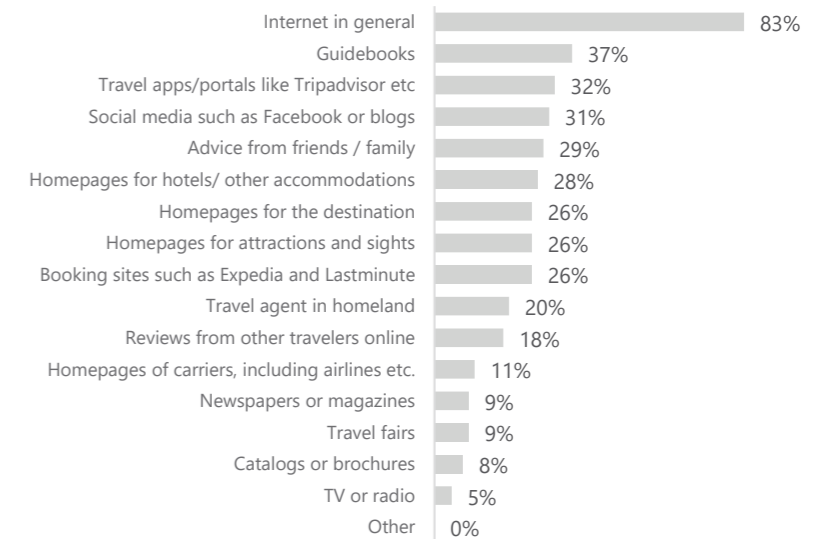
DECISION MADE



INFLUENCERS



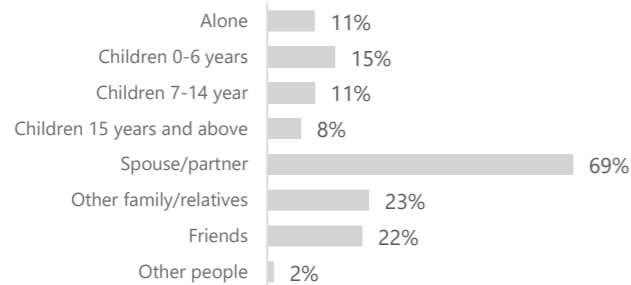
INFORMATION SOURCES



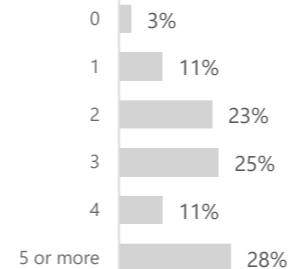
TRAVEL COMPANIONS



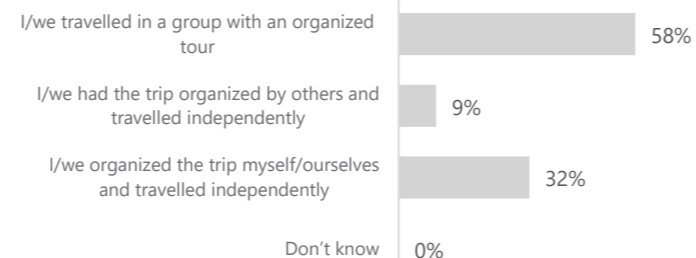
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

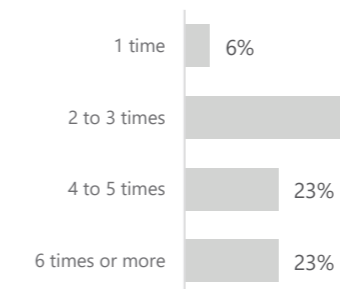


HOW DID YOU TRAVEL

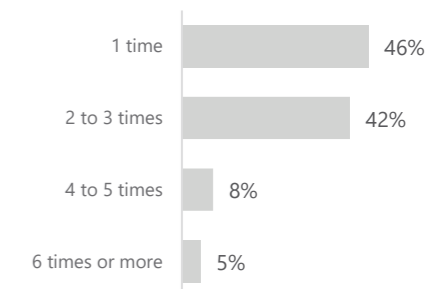


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE



A scenic view of a coastal town with a red wooden building in the foreground, overlaid with a Venn diagram. The background shows a harbor with boats, a wooden walkway, and mountains in the distance. The Venn diagram consists of three overlapping circles: a large blue circle at the top, and two white circles below it. The word 'ESCAPE' is written in white inside the blue circle. The text 'PEACEFUL AND HARMONIOUS' is written in white inside the left white circle, and 'RESTORE MY SENSE OF HARMONY AND BALANCE' is written in white inside the right white circle. The intersection of the two white circles is shaded light blue.

ESCAPE

PEACEFUL AND
HARMONIOUS

RESTORE MY SENSE
OF HARMONY AND
BALANCE

Escape is about the experience of retreat, tranquility and quietness. These are the holidays one feels the need to **retreat** and **recharge**. One is looking for an experience that soothes, comforts and **takes away the stresses and strains of hectic daily life**. These are the holidays one withdraws to a physical or mental space that is **worry free** - an almost childlike state of feeling safe and cared for.

ESCAPE

SOMETIMES I NEED TO RESTORE MY SENSE OF HARMONY AND BALANCE. ESCAPE FROM THE DEMANDS OF LIFE, RELAX AND UNWIND.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

The core meaning of going on holiday is to **restore my sense of harmony** and balance. I need to escape from my hectic daily life, and **pamper myself**. I want to discover new and interesting places.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that has **quiet environments** and allows me to live **close to nature**. It should have beautiful **unspoiled nature**. The destination should offer good local cuisine, guaranteed sunshine, romantic spots and should be good value for money.

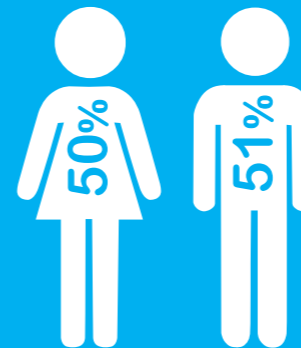
PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **peaceful, cozy, relaxed** and **harmonious**.

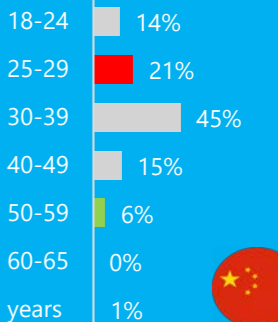
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who needs **escape** from the demands of life and **relax** and unwind. People who need time for themselves and who want to **revitalize** themselves.

79%
ARE UNDER
40 YEARS



SHARE OF
OVERNIGHT
STAYS
8%



ESCAPE

TYPICAL HOLIDAY OCCASIONS

In this segment you will find holidays to do sightseeing/roundtrips, holidays to experience nature, scenery and wildlife and visits to historical sites. Of course you will find the typical sun and beach vacation as well as cultural experiences as city breaks.

I TRAVEL TO A QUIET PLACE

These consumers choose destinations that makes them **restore their sense of harmony**. They often rent a **car at their destination**. They normally stay for 5-8 days.

THE ROLE OF BRANDS

This segment is important when brands want to profile themselves as supporting people in **relieving stress and tension**. These are the brands and companies that focus on protection and prevention against danger and harm in everyday life. These brands function as a **safety** net around us, our families and loved ones.

HOLIDAY EXPERIENCE

Observe beauty of nature and relaxation is on top of the list more than in other segments. The same goes for observing **natural phenomenon** and **experience mountains, the wilderness or the wildlife**. As long as the activities are in quiet environments **close to nature** we are in line with segment needs.

SOURCES OF INSPIRATIONS

Many of these consumers decide on the trip short time ahead of departure. 61% of them settle for the trip less than **four weeks before** they go. They are over indexing on and the **internet** in general and **travel agent in homeland** as points of inspiration.

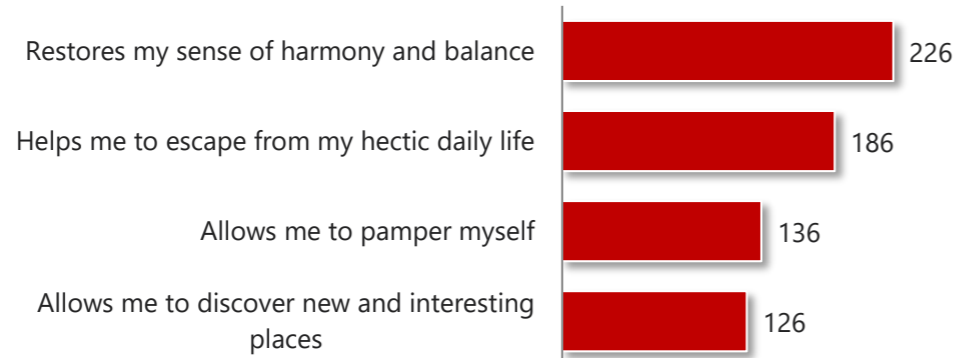


ESCAPE

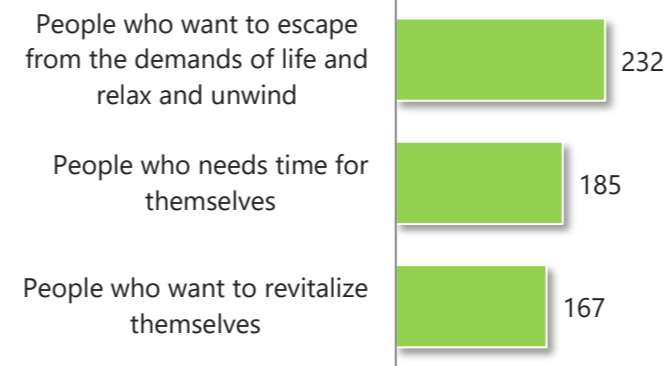
Core motivations



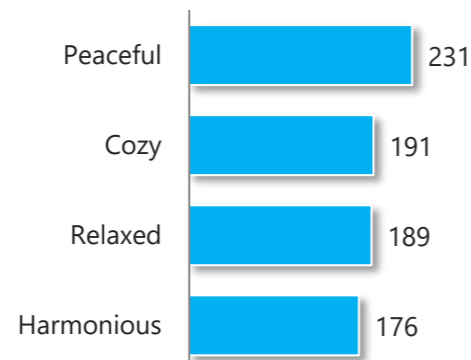
Emotional Benefits



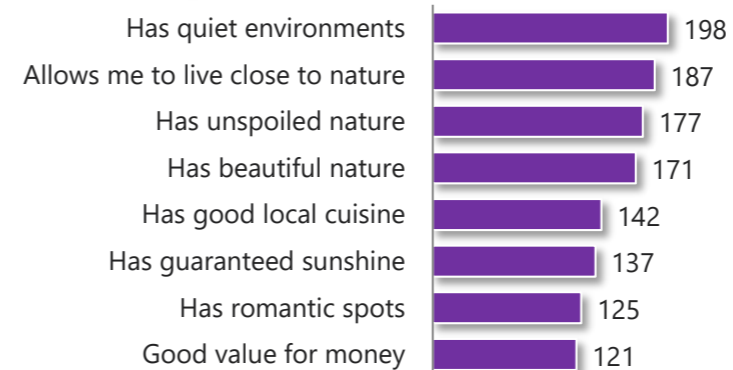
Social Identity



Personality



Destination features



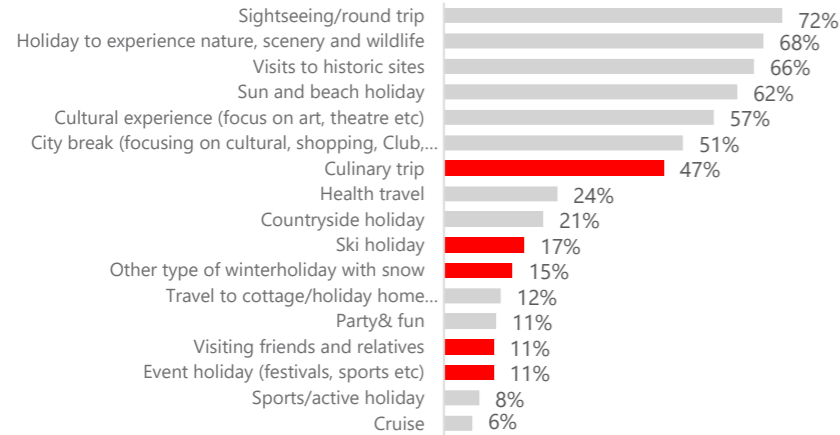
SEGMENT PROFILE – ESCAPE

■ Significantly over indexed in segment
■ Significantly under indexed in segment

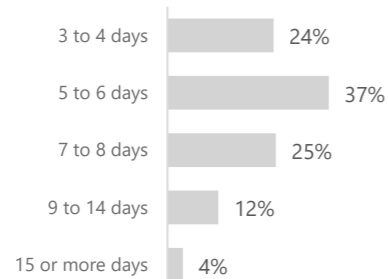
TYOLOGY



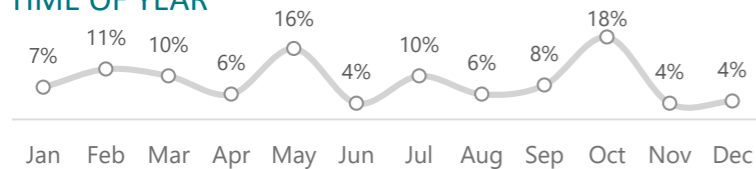
TYPE OF HOLIDAY



DURATION



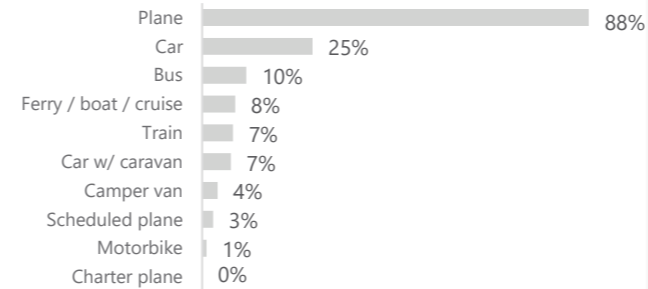
TIME OF YEAR



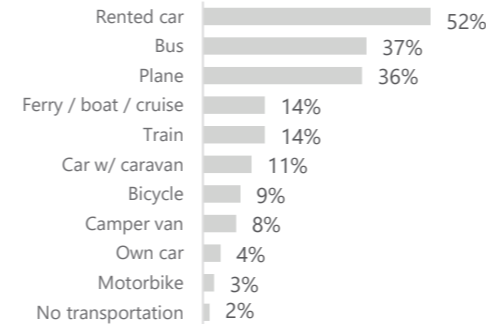
TRANSPORT AND ACOMMODATION



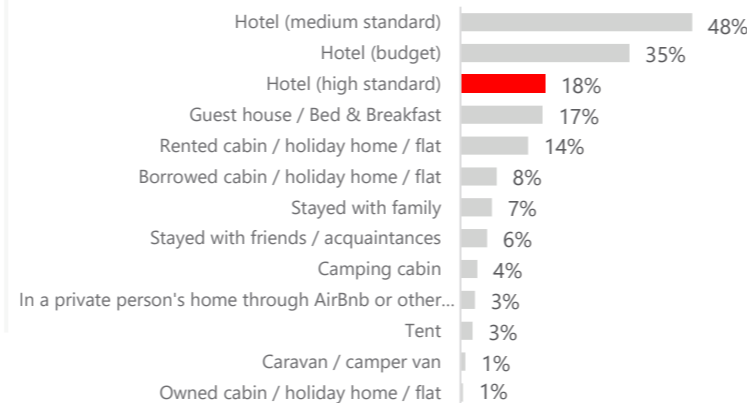
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



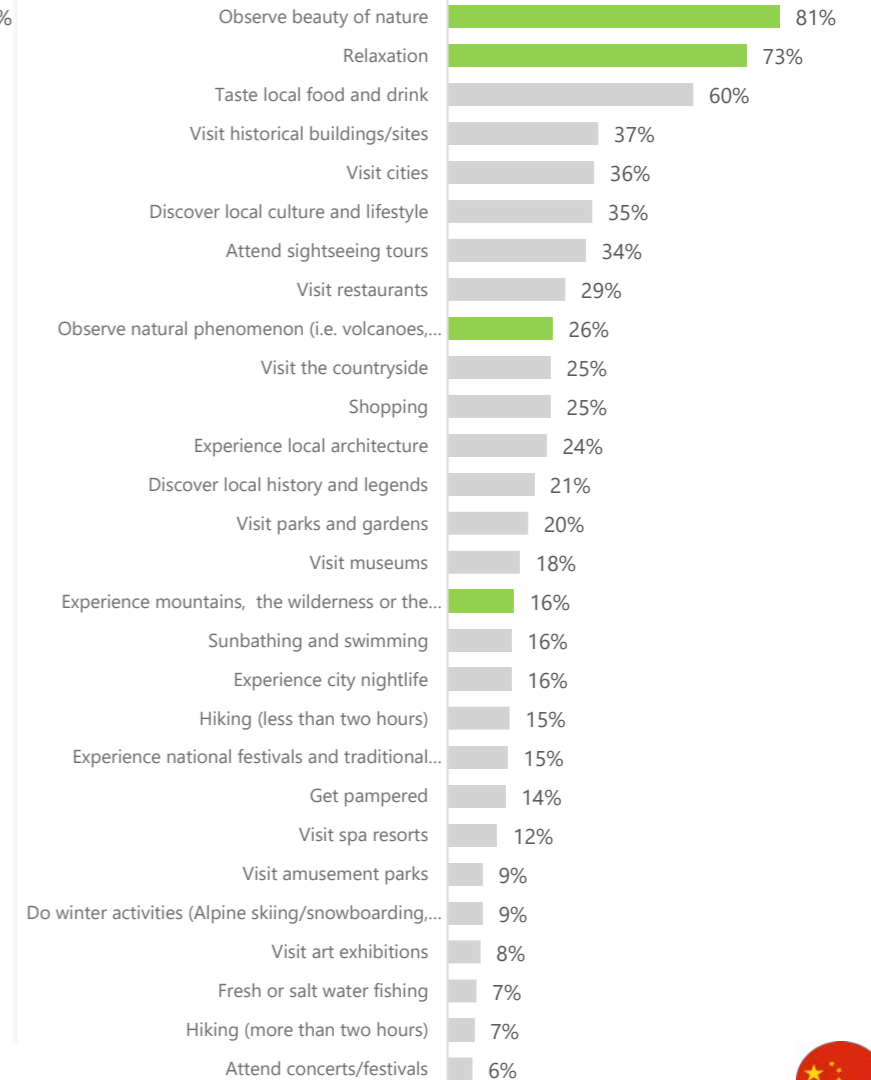
ACCOMMODATION



ACTIVITIES



ACTIVITIES



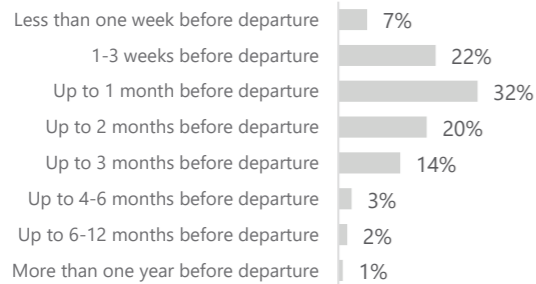
SEGMENT PROFILE - ESCAPE

■ Significantly over indexed in segment
■ Significantly under indexed in segment

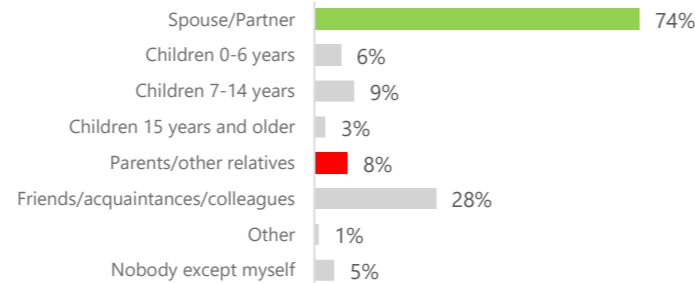
PLANNING



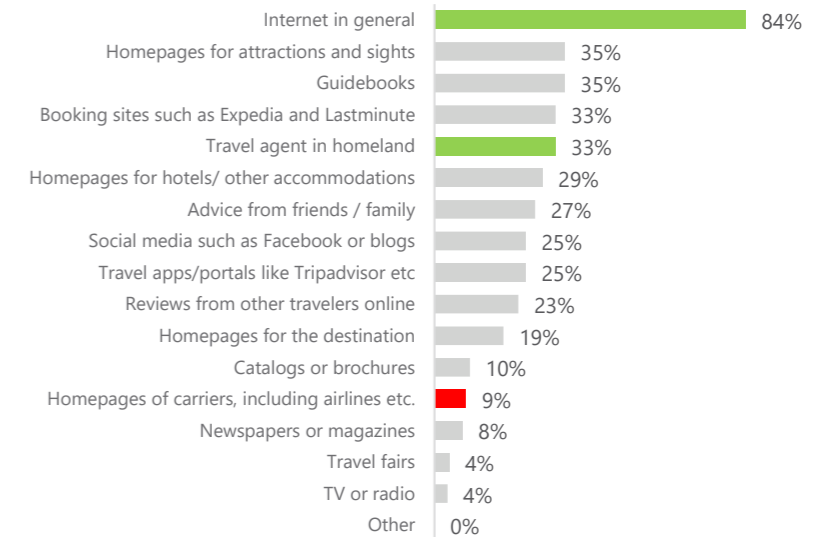
DECISION MADE



INFLUENCERS



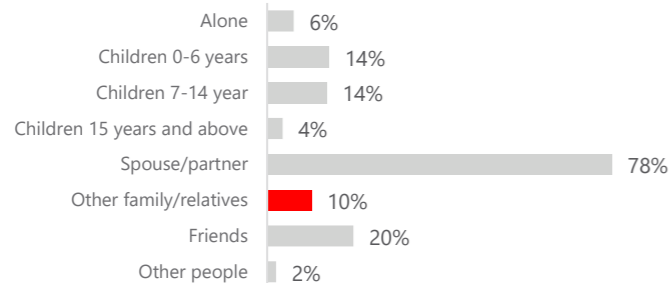
INFORMATION SOURCES



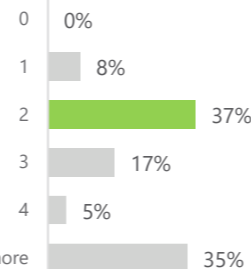
TRAVEL COMPANIONS



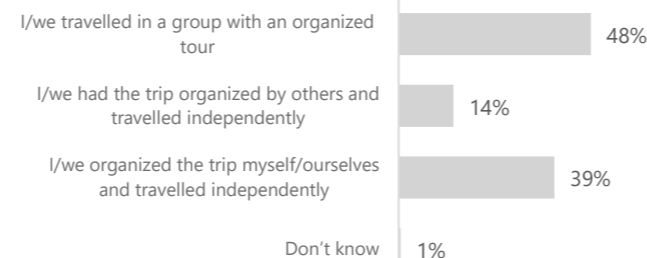
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

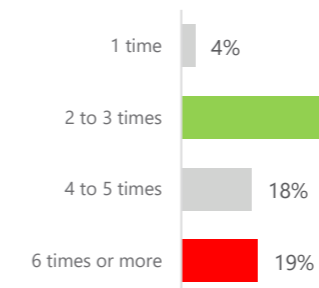


HOW DID YOU TRAVEL

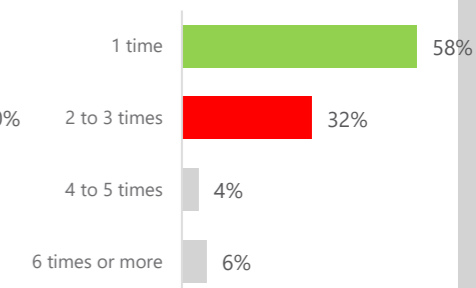


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE



CONTROL

PRACTICAL AND
PREDICTABLE

AVOID SURPRISES

Control is about **avoiding surprises** and seek the **familiar** instead of the unknown. There are holidays when I like to be completely in control, to keep things in order, keeping it **practical** and **predictable** feels quite comfortable and safe. This gives me a sense of stability and structure.

CONTROL

I LIKE TO KEEP EVERYTHING UNDER CONTROL AND AVOID SURPRISES. I HAS TO BE WELL ORGANIZED, PRACTICAL AND PREDICTABLE.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

The core meaning of going on holiday is to **keep everything under control**. I want to **avoid** too much **surprises**. I want a holiday that gives me a **safe feeling**.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that is not just for anybody, a **destination which is exclusive**. The destination should be **well organized** and **easy to travel to**. It should also be easy to travel around.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **practical, structured** and **predictable**.

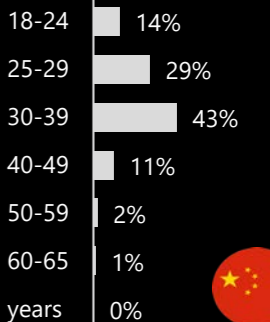
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who wants to **avoid risk**. People who make **rational choices** and who prefer the **familiar** over the unknown. Basically people who like to do things the **unconventional** way. People for whom **family comes first** above all and for people who have an **active and busy social life**.

86%
ARE UNDER
40 YEARS



SHARE OF
OVERNIGHT
STAYS
16%



CONTROL

TYPICAL HOLIDAY OCCASIONS

Although holiday to experience nature, scenery and wildlife, visits to historic sites and sightseeing/round trips dominates in this segment, you will also find **sports/active holidays** and other types of **winter holidays** to a greater extent than in other segments. The same goes for **visiting friends and relatives** and **event holidays**.

HOLIDAY EXPERIENCE

Observe beauty of nature and **relaxation** is on top of the list. This segment is under indexing on many activities, so a **less active segment**.

I TRAVEL TO AVOID SURPRISES

These consumers choose destinations that is **well organized**. They want to travel to places that are **practical, structured** and **predictable**. They want to have a informal, fun and relaxed holiday at the same time. I want to avoid too much surprises!

SOURCES OF INSPIRATIONS

These consumers **travel with their spouse/partner and with children**. They also travels more alone compared with the other segments. Nevertheless, many **travel in a group** with an **organized tour** (50%). They do not use that many information sources because the **go to a place they know**.

THE ROLE OF BRANDS

Control plays an important role for brands if they are aimed at **structuring people's lives** or when the focus is on risk management, simplifying life, avoiding surprises. Brands that want to position themselves on Control should offer **rational arguments** and focus on **functionality**, maturity, health, purity, hygiene, and less in impulsiveness and fun.



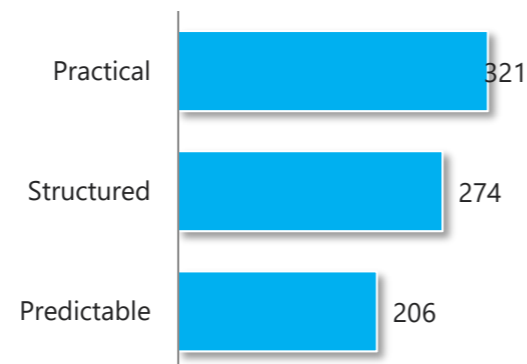
CONTROL

Core motivations

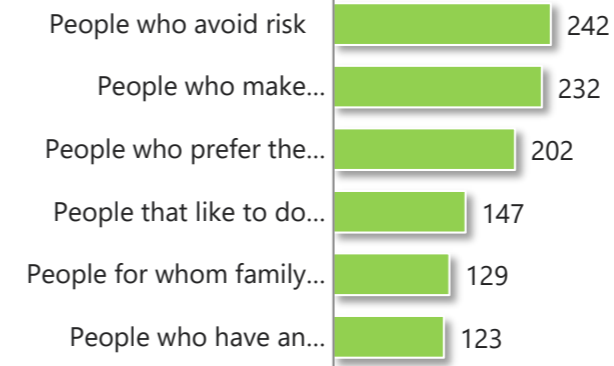
Emotional Benefits



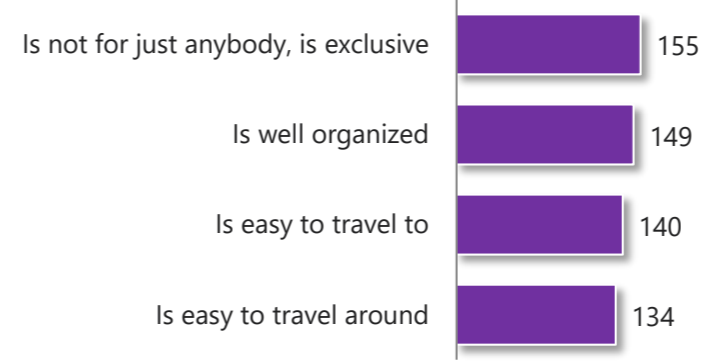
Personality



Social Identity



Destination features



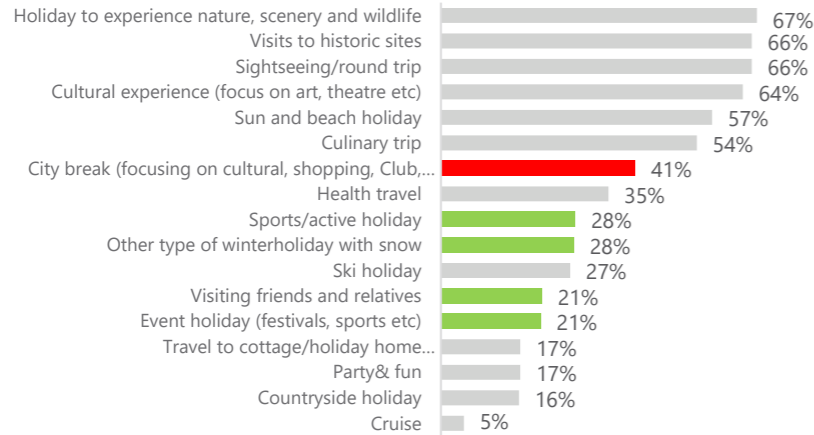
SEGMENT PROFILE – CONTROL

■ Significantly over indexed in segment
■ Significantly under indexed in segment

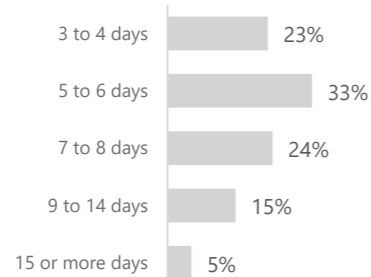
TYOLOGY



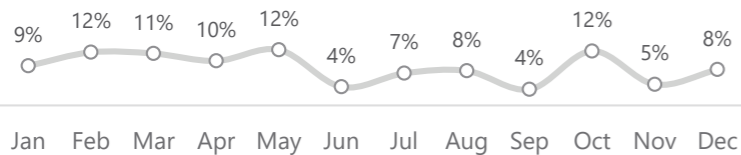
TYPE OF HOLIDAY



DURATION



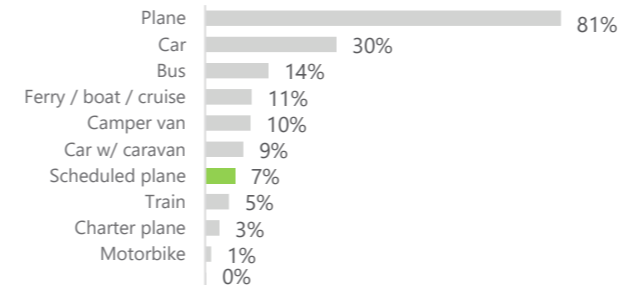
TIME OF YEAR



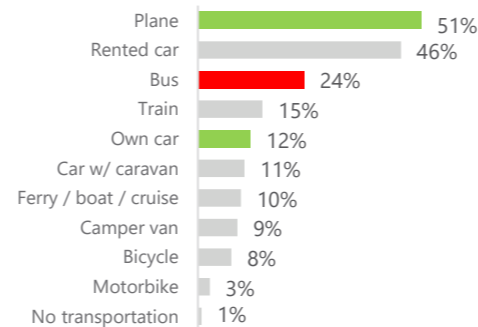
TRANSPORT AND ACOMMODATION



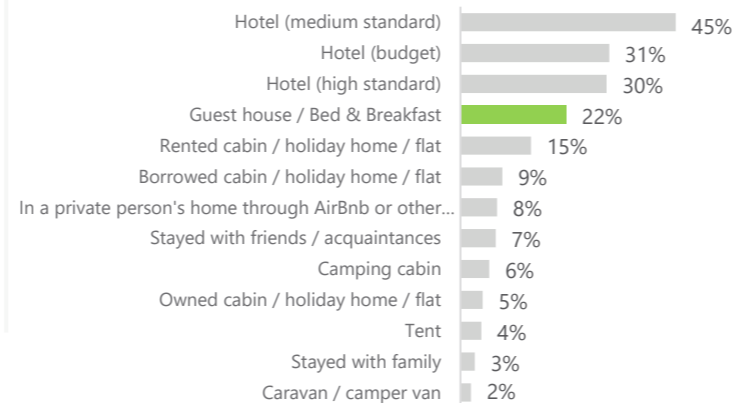
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



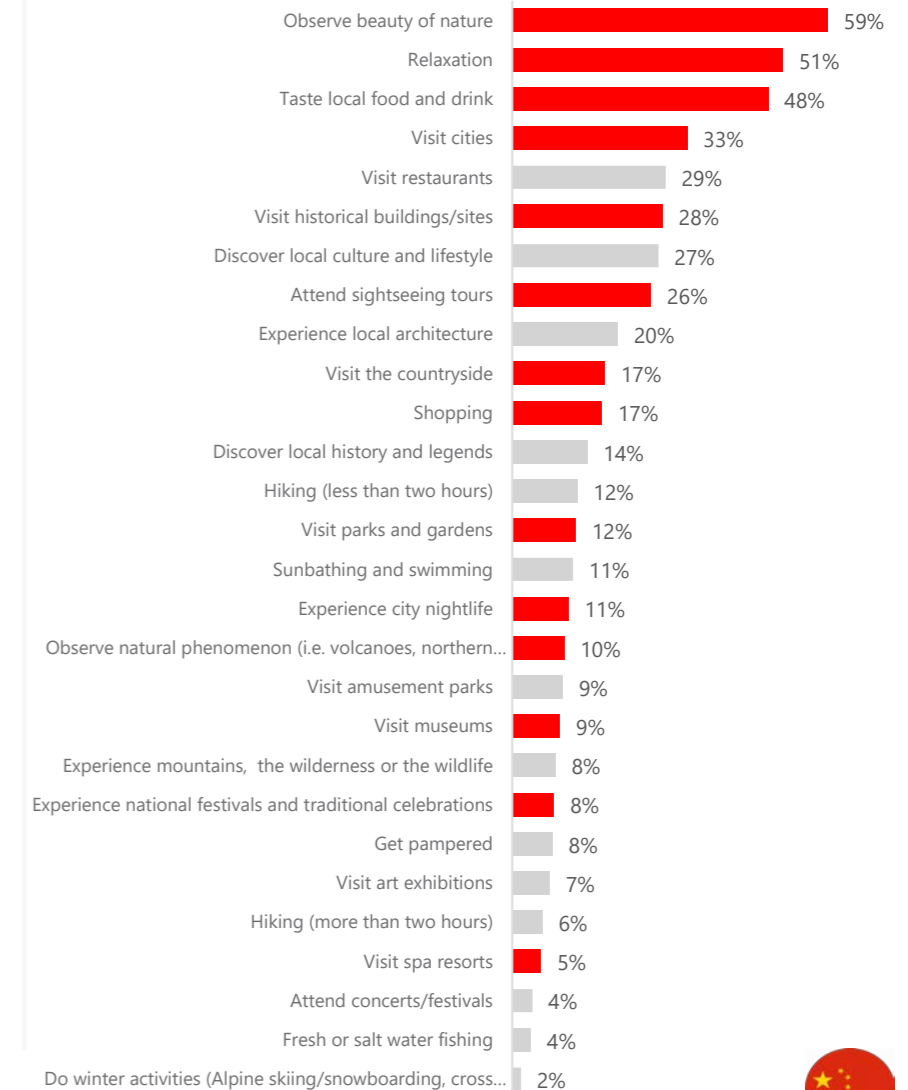
ACCOMMODATION



ACTIVITIES



ACTIVITIES



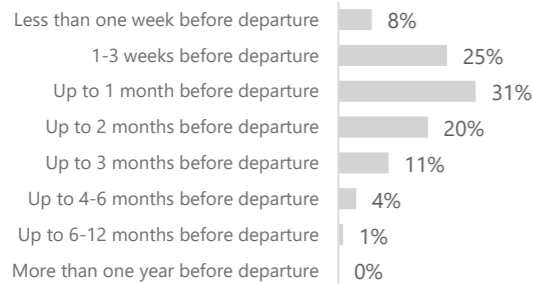
SEGMENT PROFILE - CONTROL

■ Significantly over indexed in segment
■ Significantly under indexed in segment

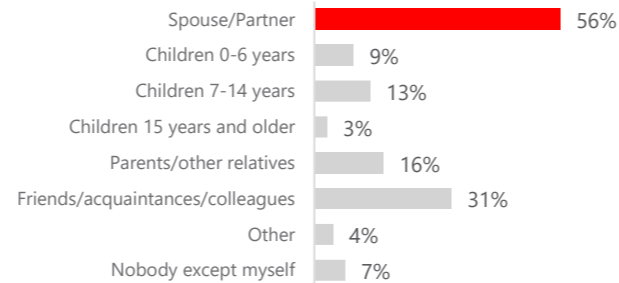
PLANNING



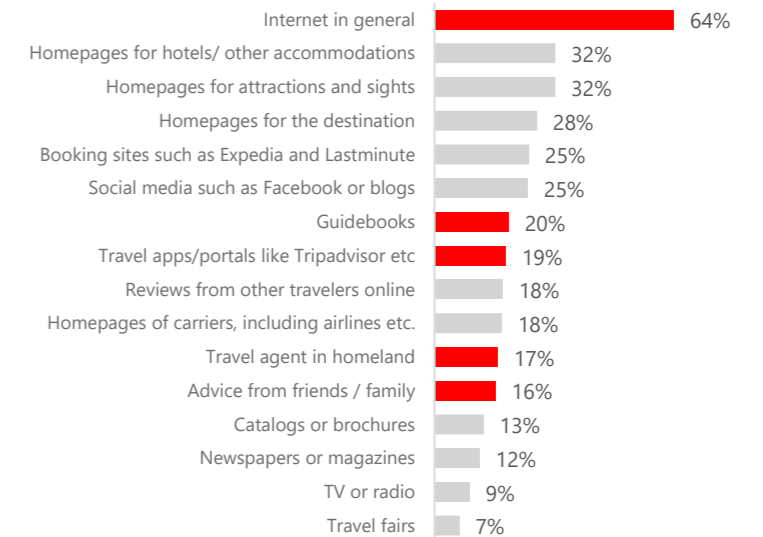
DECISION MADE



INFLUENCERS



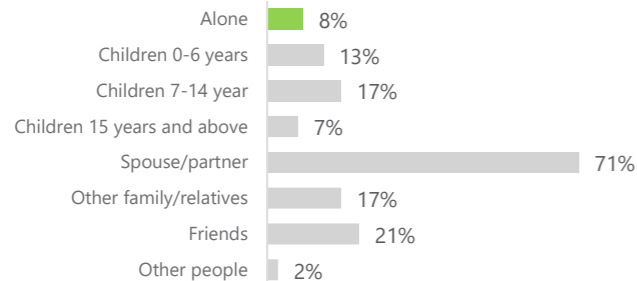
INFORMATION SOURCES



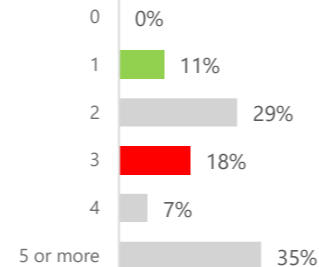
TRAVEL COMPANIONS



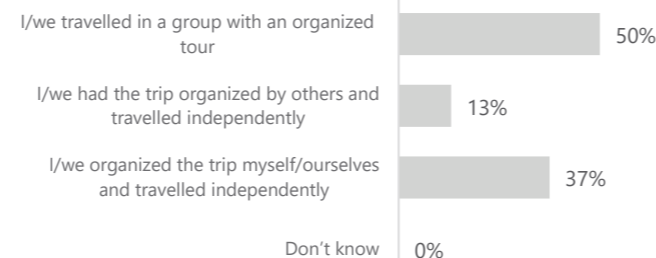
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

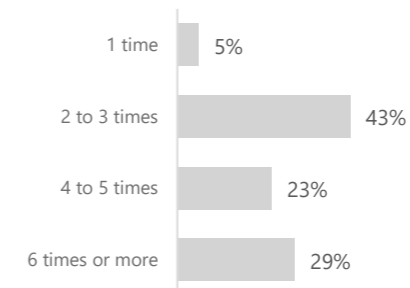


HOW DID YOU TRAVEL

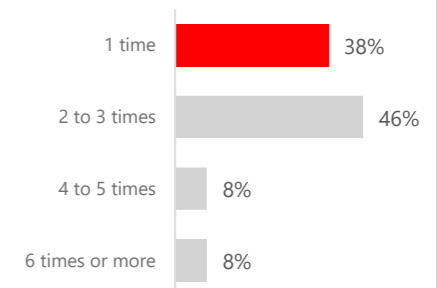


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





BROADENING MY CULTURAL HORIZON

CULTIVATED,
EXPLORATIVE AND
AUTHENTIC

BROADENING MY
KNOWLEDGE

Broadening my cultural horizon is about feeling **cultivated**, special and ahead of the pack. The segment reflects the need to **learn** about a foreign culture, stand out from the crowd and break from convention. The segment is all about being proud of one's own special ability and competence, intellectually, culturally and materially. **Something to talk about when coming home.**

BROADENING MY CULTURAL HORIZON

SOMETIMES I NEED TO BROADEN MY HORIZON AND DISCOVER NEW AND INTERESTING PLACES. I WANT TO EXPERIENCE CULTURE AND ART AT A DESTINATION WITH A RICH CULTURAL HERITAGE.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

The core meaning of going on holiday is to **enrich my view on the world** and to **broaden my knowledge** and my **horizon**. All in all I want **rich experiences** and to discover **new and interesting places**.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place with interesting **culture & art** and a rich **cultural heritage**. There must be **interesting sights**. The destination needs to be easy to travel to and around and have good shopping.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **cultivated, authentic, explorative, unique** and harmonious.

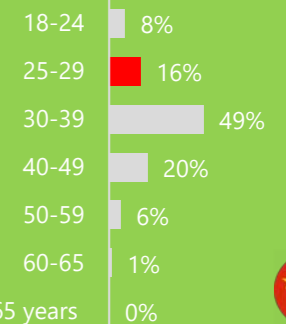
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who are interested to **learn more**. Generally people who like to **explore** and have **new experiences**.

73%
ARE UNDER
40 YEARS



SHARE OF
OVERNIGHT
STAYS
4%



BROADENING MY CULTURAL HORIZON

TYPICAL HOLIDAY OCCASIONS

The dominant types of holiday is visits to **historic sites**, Sightseeing/round trips, cultural experience (focus on art, theatre etc.) and holiday to experience nature, scenery and wildlife.

It's all about **broadening my horizon!**

I TRAVEL TO EXPAND MY HORIZON

These consumers want to see and learn more than other travelers. They seek destinations with a rich **cultural heritage**. There must be **interesting sights**.

THE ROLE OF BRANDS

The segment is important for brands which try to position themselves as creatively **individualistic**, **unconventional**, trendy and ahead of the rest, or as a tool for consumers to express their intelligence and **cultural awareness**.

HOLIDAY EXPERIENCE

Observe beauty of nature, relaxation and taste local food and drinks are on top of their list. They are over indexing on **visits to historical sites**, **visit cities** and **discover local architecture**.

SOURCES OF INSPIRATIONS

These consumers use the internet in general as their main source of information. Furthermore they use homepages for attractions and sights, travel apps like TripAdvisor and listen to advice from friends and family.



BROADENING MY CULTURAL HORIZON

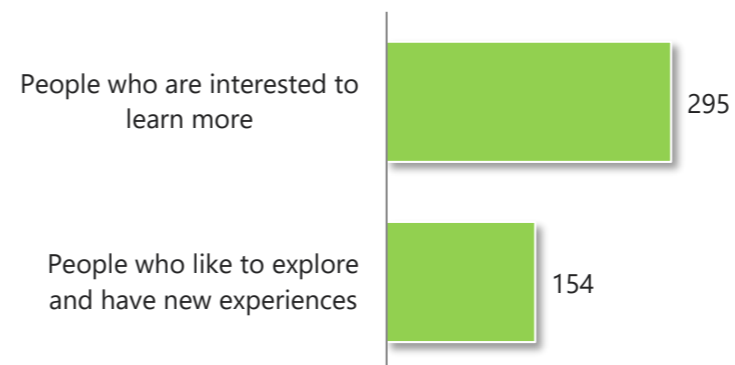
Core motivations



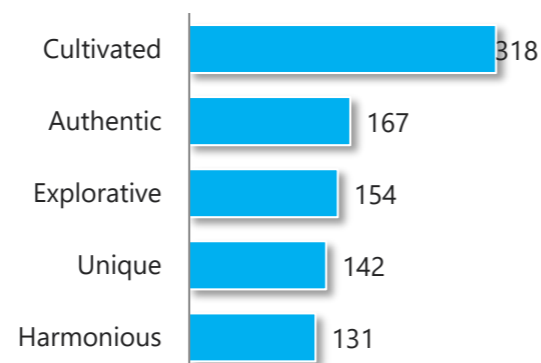
Emotional Benefits



Social Identity



Personality



Destination features



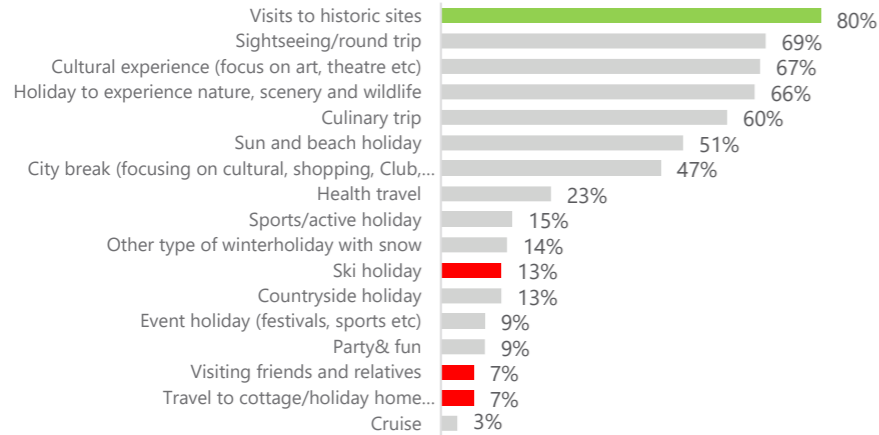
SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

■ Significantly over indexed in segment
■ Significantly under indexed in segment

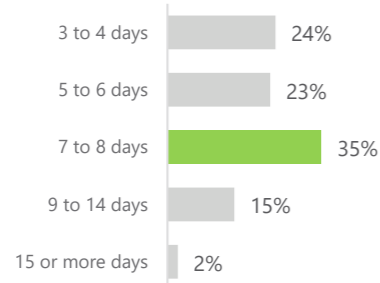
TYOLOGY



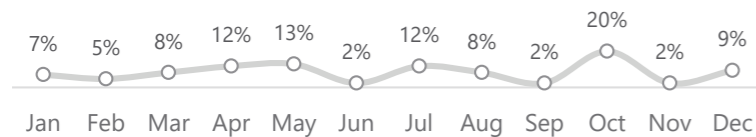
TYPE OF HOLIDAY



DURATION



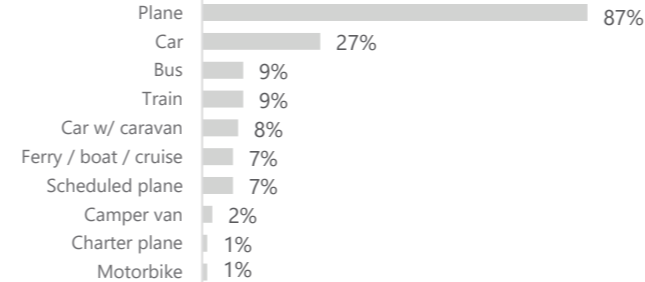
TIME OF YEAR



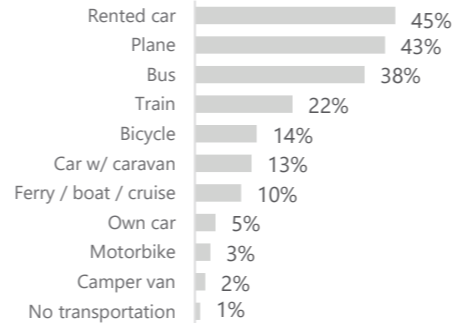
TRANSPORT AND ACOMMODATION



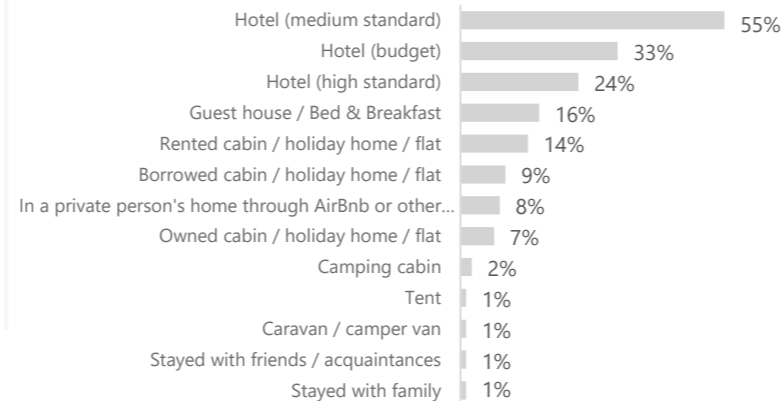
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



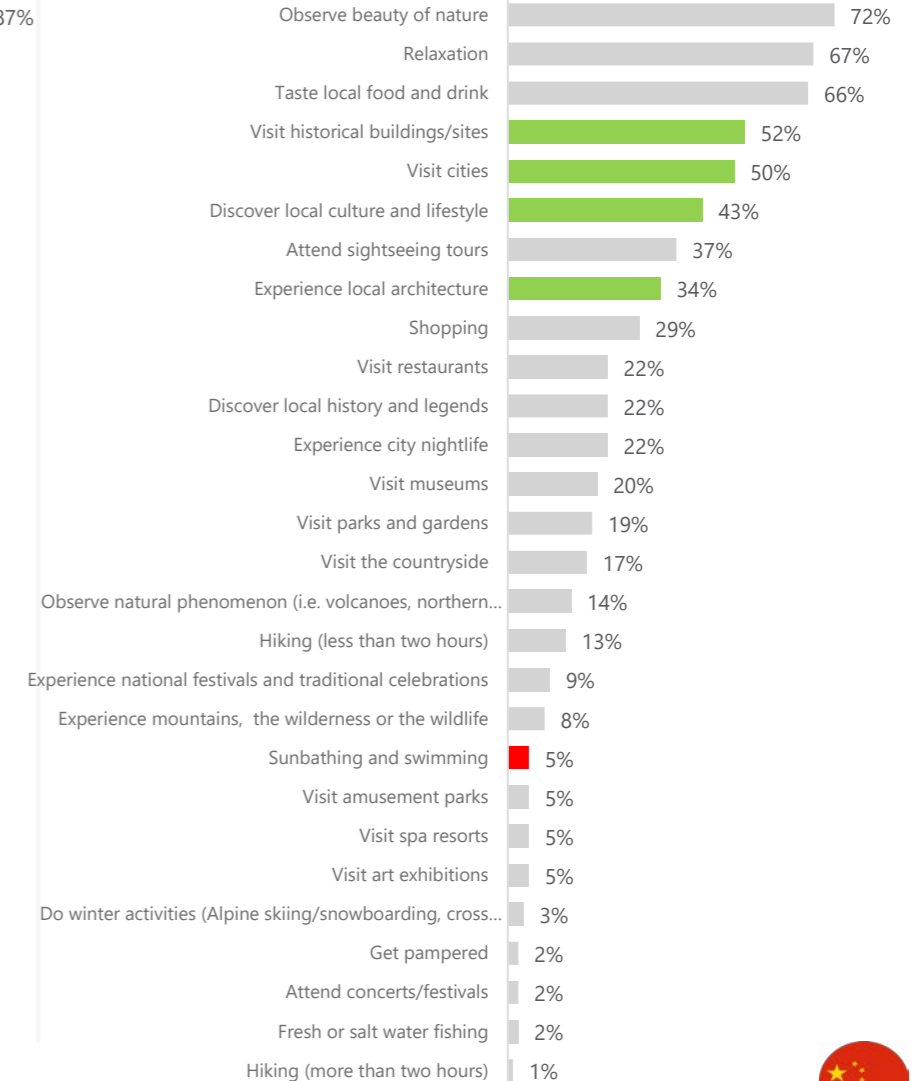
ACCOMMODATION



ACTIVITIES



ACTIVITIES



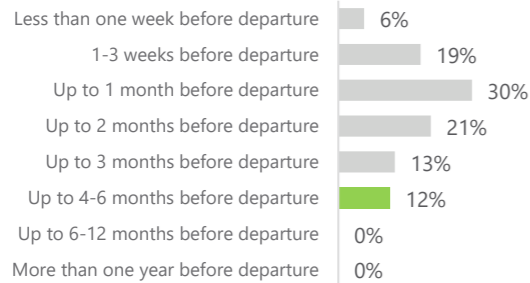
SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

■ Significantly over indexed in segment
■ Significantly under indexed in segment

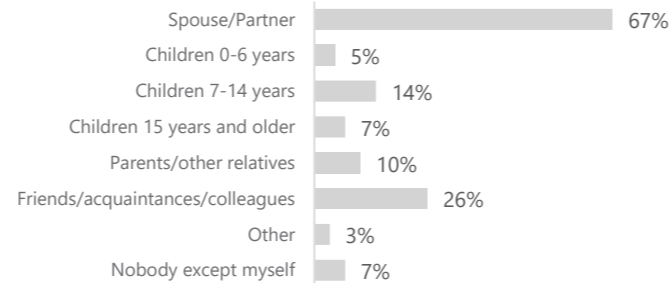
PLANNING



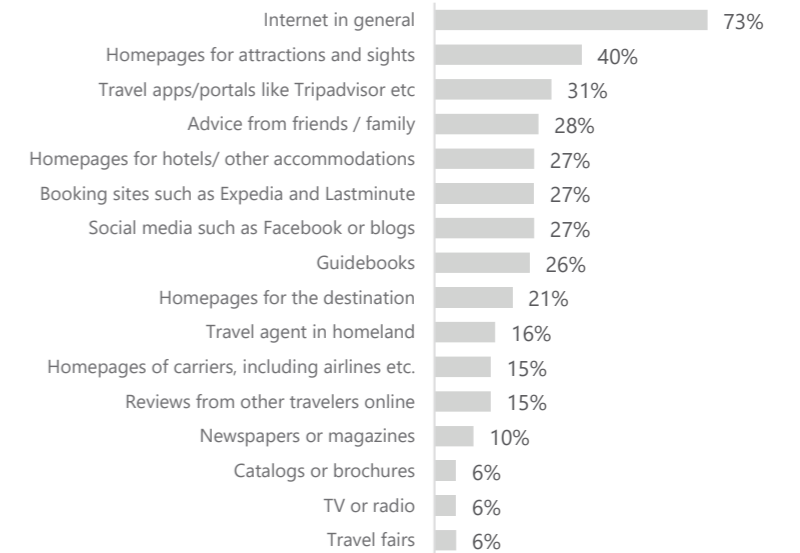
DECISION MADE



INFLUENCERS



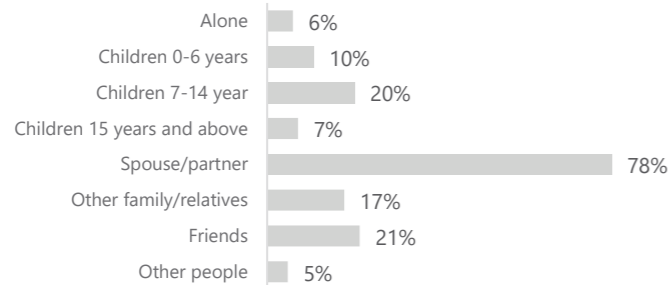
INFORMATION SOURCES



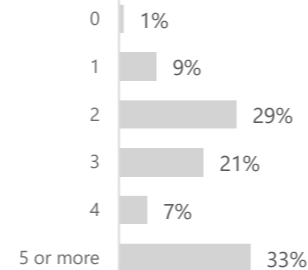
TRAVEL COMPANIONS



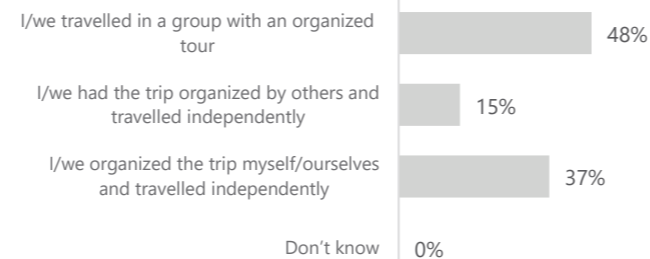
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

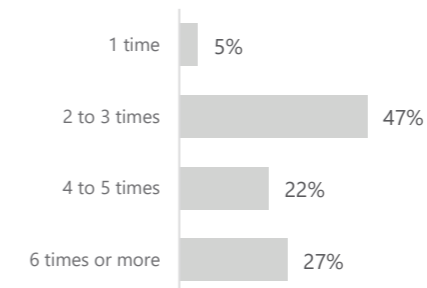


HOW DID YOU TRAVEL

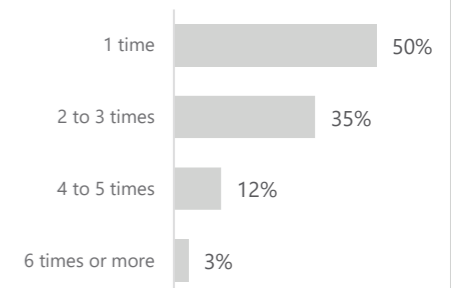


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





ADVENTURES IN THE WORLD OF NATURAL BEAUTY

ADVENTUROUS,
DARING AND
UNIQUE.

IMMERSE MYSELF IN
THE LOCAL LIFE.
UNSPOILED NATURE.

Exploring the world of natural beauty is about feeling **unique**, **daring** and **adventurous**. The segment reflects the need to see something new, **something spectacular** like a natural phenomenon. It also connects with the need to immerse in **unspoiled nature** and travel to a destination **not ruined by tourism**. Staying ahead of the “charter pack”. The segment is all about being proud of one’s ability to **“go where no one has gone before”**.

ADVENTURES IN THE WORLD OF NATURAL BEAUTY

SOMETIMES I NEED TO DISCOVER NEW AND INTERESTING PLACES AT A DESTINATION THAT HAS UNSPOILED NATURE AND THAT'S NOT RUINED BY TOURISM.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

The core meaning of going on holiday is to **give me rich experiences** and **new inspiration**. I want to **broaden my horizon** and my **knowledge** and enrich my view on the world.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that has **beautiful nature**. It should have **interesting culture & art** allow me to **live close to nature**. I want **quiet environments** for my holiday experience.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **adventurous, daring**, explorative, active, **unique** and open-minded.

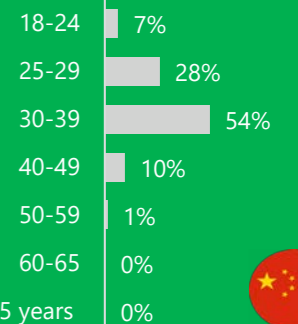
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who like **adventure** and wants a **life changing experience**. People who want to make a **different choice** and do things the **unconventional** way. People who like to **explore** and have **new experiences** and are interested to **learn more**.

64%
ARE BETWEEN
30-49 YEARS



SHARE OF
OVERNIGHT
STAYS
4%



ADVENTURES IN THE WORLD OF NATURAL BEAUTY

TYPICAL HOLIDAY OCCASIONS

The most common holiday type is a holiday to visit historic sites, experience nature, scenery and wildlife and sightseeing/round trips. They are over indexing on **cruise holiday**.

I TRAVEL TO SOMETHING UNIQUE

These consumers choose destinations that makes them **feel adventurous and daring**. They want to experience something **unique**. They want to travel to places that are fuelling their **explorative** side.

THE ROLE OF BRANDS

The segment is important for brands which try to position themselves as creatively **individualistic, unconventional**, trendy and ahead of the rest, or as a tool for consumers to express their uniqueness, seeing something others has not seen. Also act as a tool for consumers to express their **environmental awareness**. A sustainable destination, not ruined by tourism.

HOLIDAY EXPERIENCE

Relaxation and taste local food and drinks are on top of the list. They are not over indexing on any activities but have a broad specter of activities on their "want to do list".

SOURCES OF INSPIRATIONS

This segment seek their information by browsing the internet in general. They also use homepages for hotels/accommodation, and attraction/sites. Furthermore they use booking sites such as Expedia and Lastminute, and social media as inspiration and information sources.



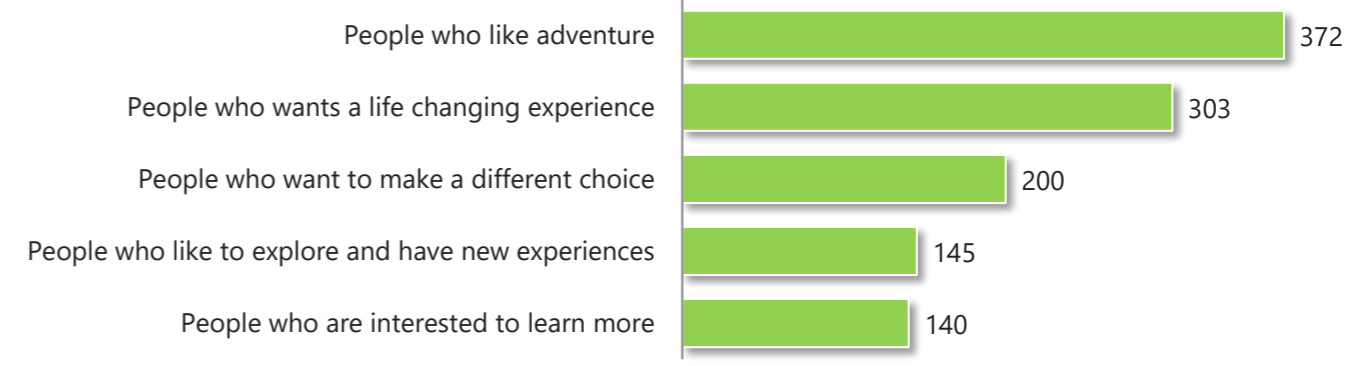
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Core motivations

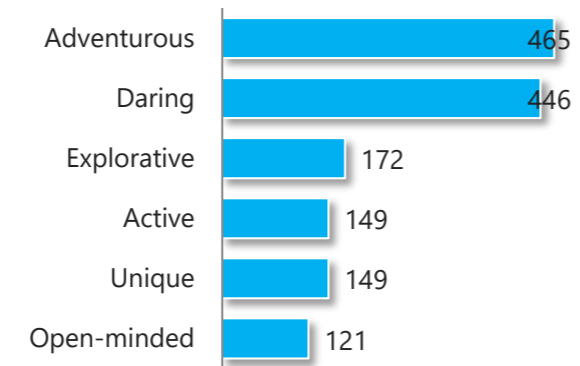
Emotional Benefits



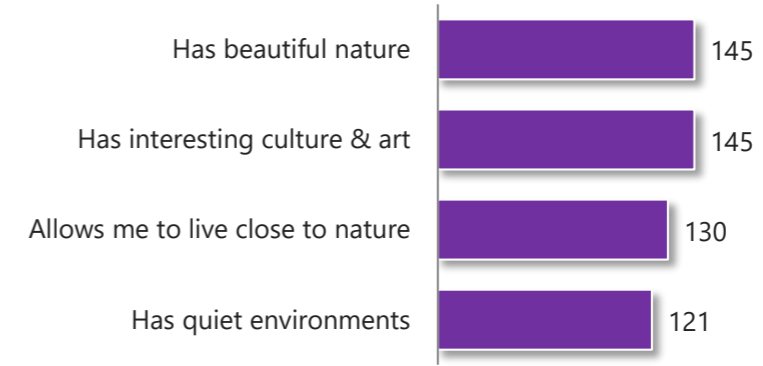
Social Identity



Personality



Destination features



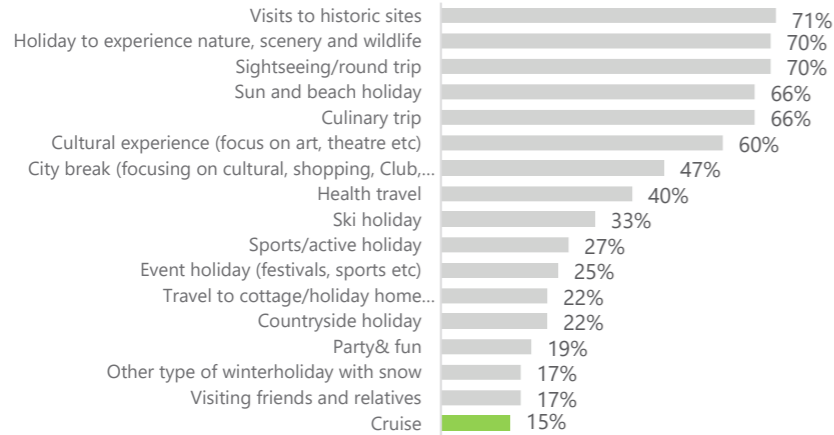
SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

■ Significantly over indexed in segment
■ Significantly under indexed in segment

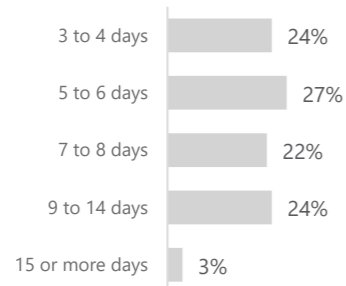
TYOLOGY



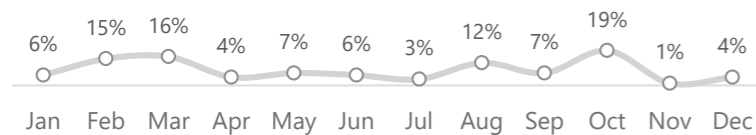
TYPE OF HOLIDAY



DURATION



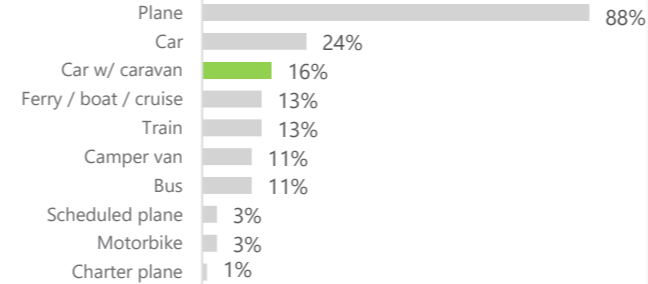
TIME OF YEAR



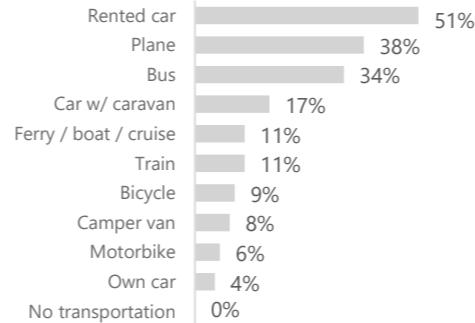
TRANSPORT AND ACOMMODATION



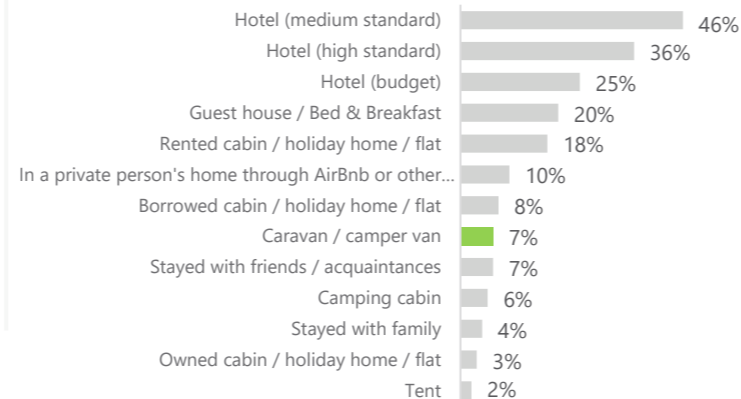
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



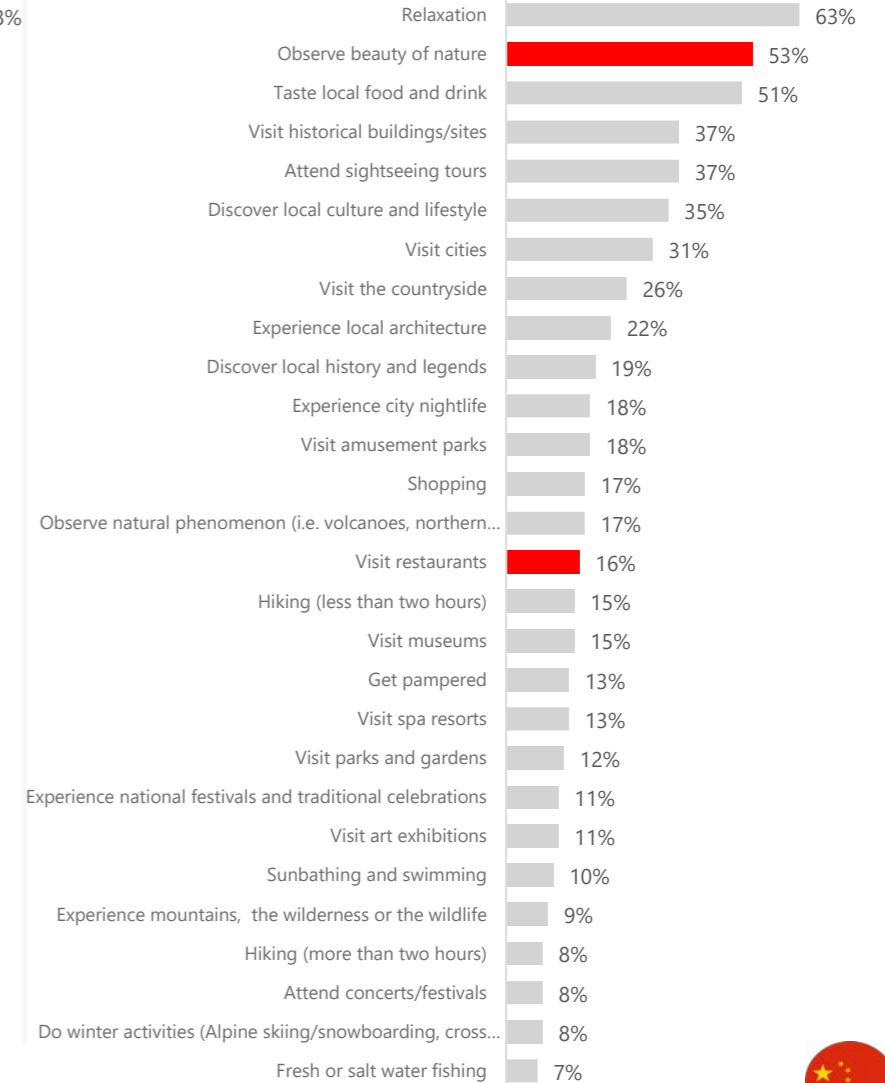
ACCOMMODATION



ACTIVITIES



ACTIVITIES



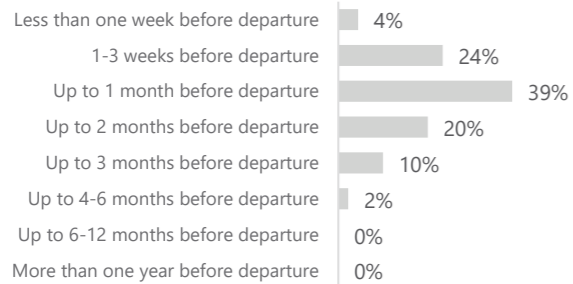
SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

■ Significantly over indexed in segment
■ Significantly under indexed in segment

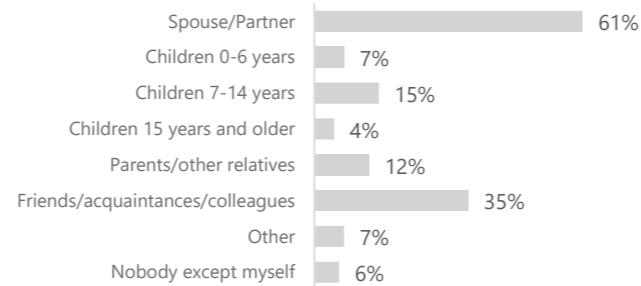
PLANNING



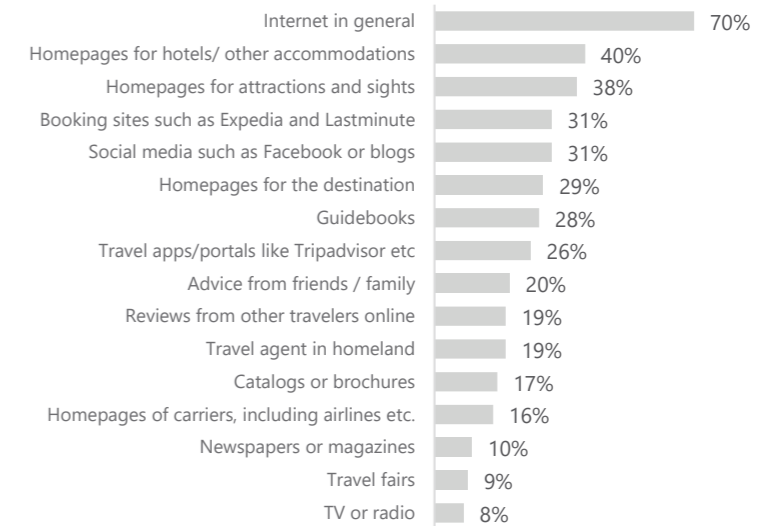
DECISION MADE



INFLUENCERS



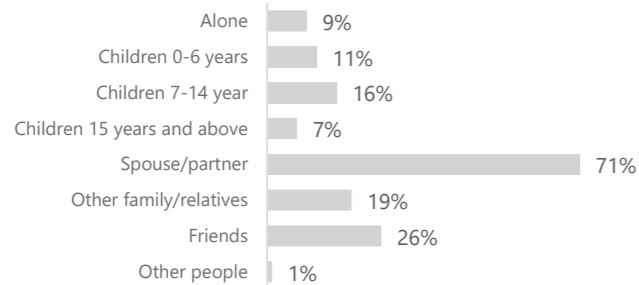
INFORMATION SOURCES



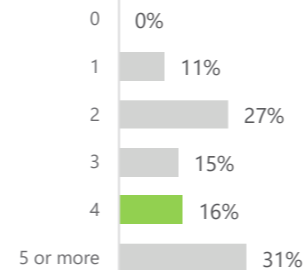
TRAVEL COMPANIONS



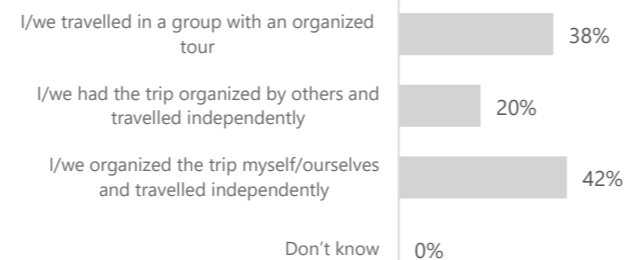
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

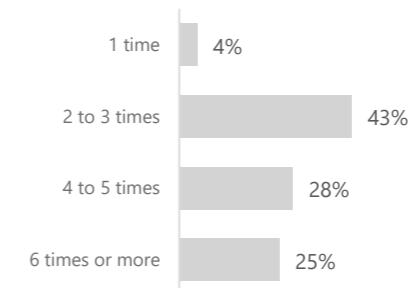


HOW DID YOU TRAVEL

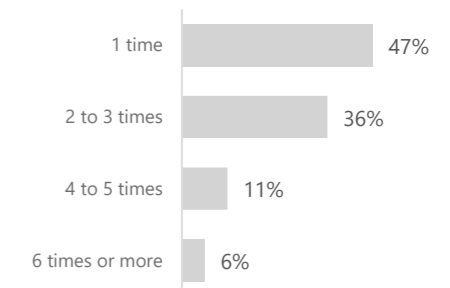


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





EXTRAVAGANT INDULGENCE

EXTRAVAGANT
AND SUPERIOR

SOPHISTICATED
AND CLASSY

Romantic luxury is about the need to indulge in some luxury. Find those **romantic spots** that really creates a feeling of **extravagance**. It relates to the desire to **feel on top of the world**. The segment reflects that **I want the best and are willing to pay for it.**

EXTRAVAGANT INDULGENCE

SOMETIMES I NEED TO INDULGE MY SELF WITH A BIT OF LUXURY AND FEEL ON TOP OF THE WORLD. I NEED A DESTINATION WITH ROMANTIC SPOTS.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

The core meaning of going on holiday is to allow me to **indulge** myself with a bit of **luxury**.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that is well **organized**. Of course it also needs to have a variety of **different restaurant offers**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **extravagant, superior** and **classy**.

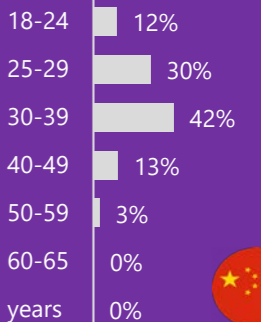
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who is **sophisticated** and **classy**. People who **want the best** and are willing to pay for it. Basically people who like to have the best things and value **high quality**.

84%
ARE BELOW
40 YEARS



SHARE OF
OVERNIGHT
STAYS
23%



EXTRAVAGANT INDULGENCE

TYPICAL HOLIDAY OCCASIONS

You will find sightseeing/round trips, holidays to experience nature, scenery and wildlife, visits to cities and cultural experiences on top of the list in this segment. They over index on but you will find **sports/active holidays** and **travel to cottages/holiday homes**. Although, most of the time **it's all about romance!**

HOLIDAY EXPERIENCE

These consumers over index on **visits to restaurants**. They want their **romantic spots** which they can find both in **cities** and at historical sites. They often rent a car for their romantic getaways, and stay mostly at medium standard hotels.

I TRAVEL FOR ROMANCE AND LUXURY

These consumers choose destinations that enables them **to indulge in a bit of luxury**. They often travel **in a group on organized tours** (47%).

SOURCES OF INSPIRATIONS

These consumers **don't spend a lot of time planning**. 64% of them settle for the trip **less than four weeks** before they go. They get inspired by **homepages of carriers** or **tv and radio**. They also browse the internet in general to get luxurious romantic inspiration. They travel with their **partner** and gets inspired by him or her.

THE ROLE OF BRANDS

The segment is important for brands trying to position themselves as **premium, high-class** and **powerful**. It appeals to the need to be **respected** and revered, to feel strong and **'on-top-of-the-world'**. It is also an important dimension for brands who want to be perceived as **exclusive** and only **available for the lucky few**.



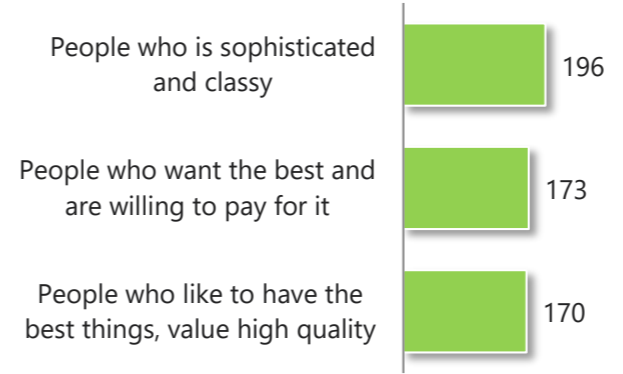
EXTRAVAGANT INDULGENCE

Core motivations

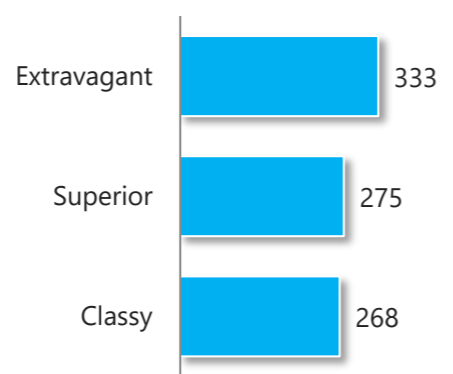
Emotional Benefits



Social Identity



Personality



Destination features



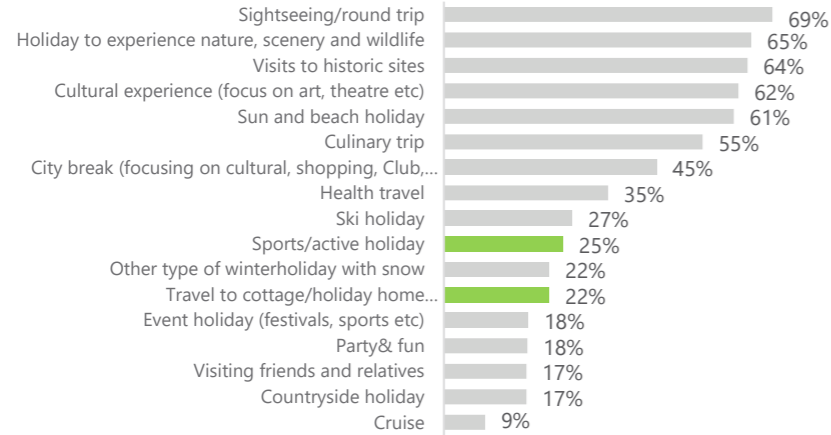
SEGMENT PROFILE – EXTRAVAGANT INDULGENCE

■ Significantly over indexed in segment
■ Significantly under indexed in segment

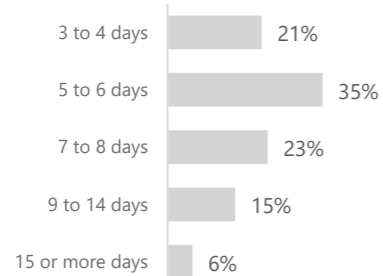
TYOLOGY



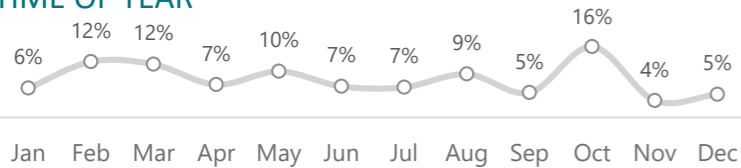
TYPE OF HOLIDAY



DURATION



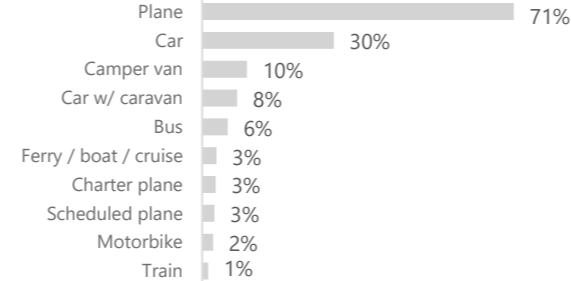
TIME OF YEAR



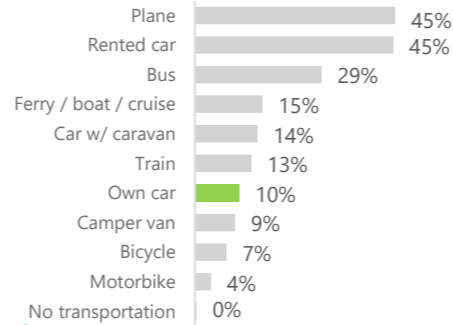
TRANSPORT AND ACOMMODATION



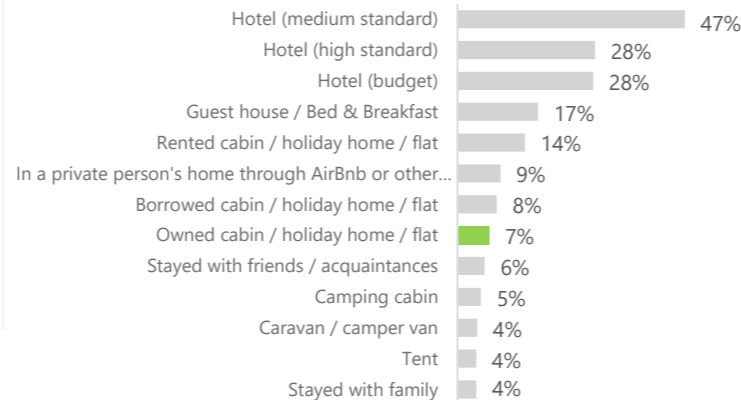
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



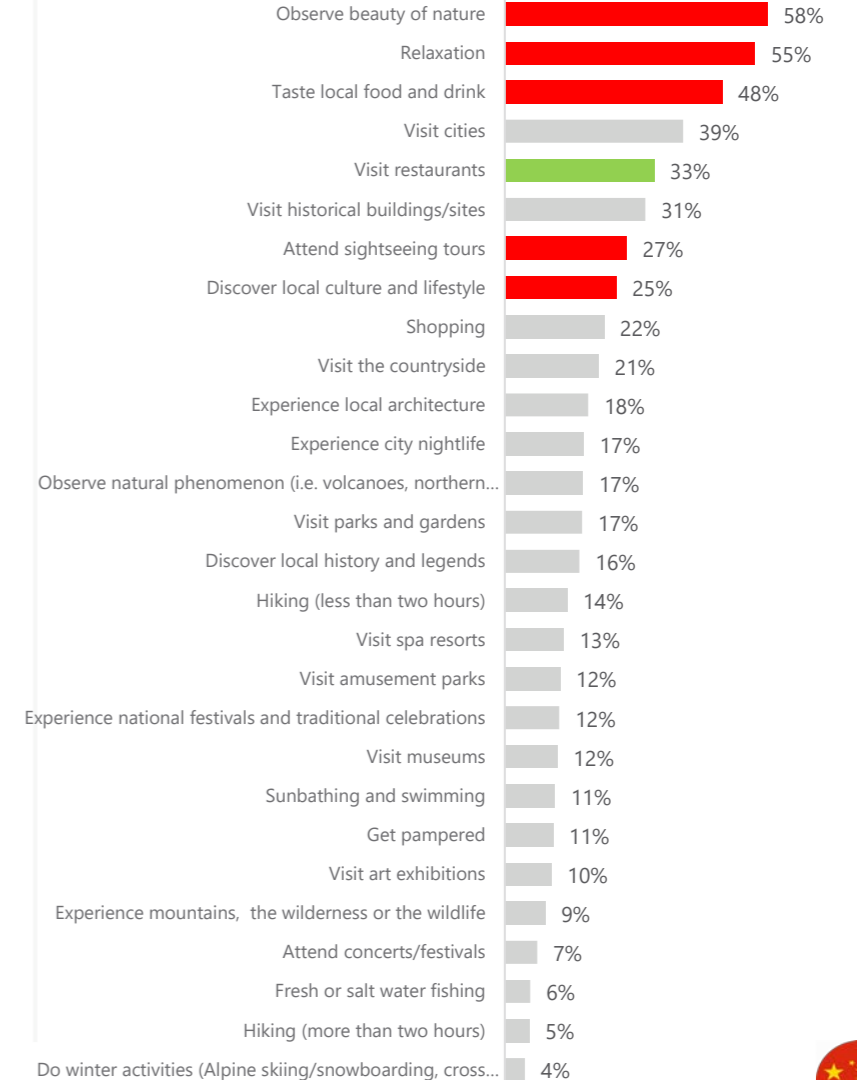
ACCOMMODATION



ACTIVITIES



ACTIVITIES



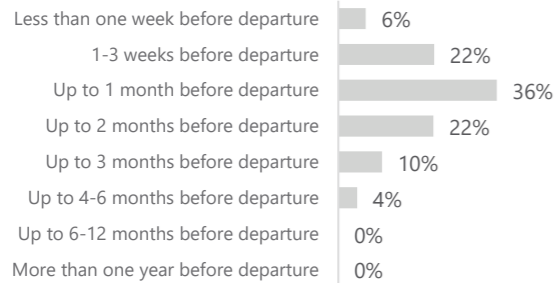
SEGMENT PROFILE - EXTRAVAGANT INDULGENCE

■ Significantly over indexed in segment
■ Significantly under indexed in segment

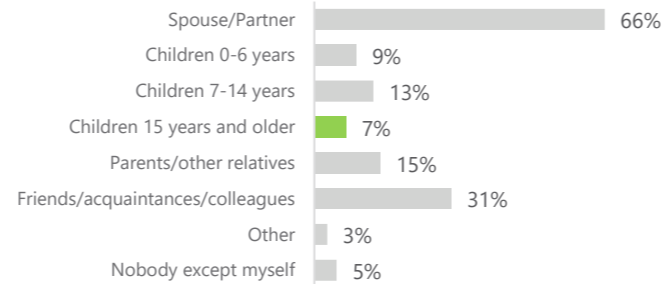
PLANNING



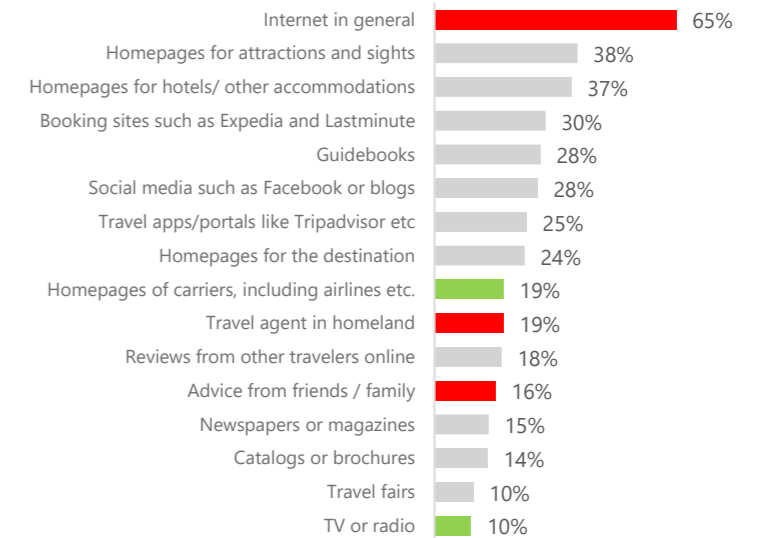
DECISION MADE



INFLUENCERS



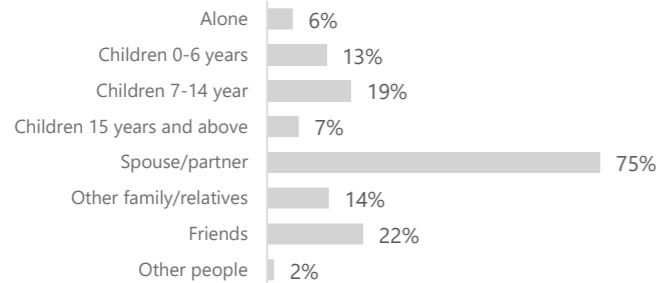
INFORMATION SOURCES



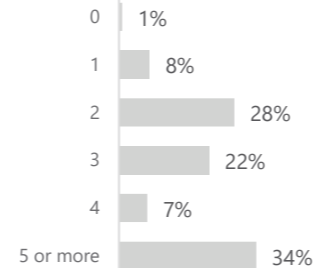
TRAVEL COMPANIONS



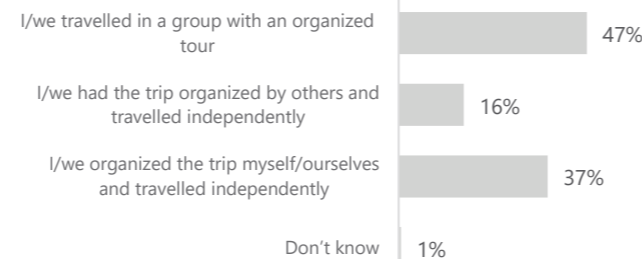
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

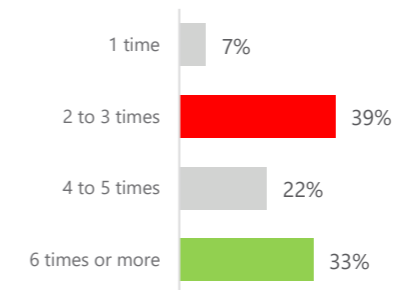


HOW DID YOU TRAVEL

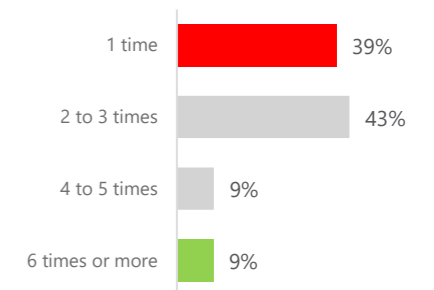


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE





ENERGY

ACTIVE AND
ADVENTUROUS

HAVE AS MUCH
FUN AS POSSIBLE

Energy is about adventure, **being active**, testing your boundaries and discovering new things. It taps into the need to be **energized**. Energy is all about being active and experiencing the freedom, passion, and adventure that comes with activities. Buzzing about, **spending energy**, and feeling very much **alive and kicking**.

ENERGY

SOMETIMES I NEED A HOLIDAY THAT GIVES ME ENERGY AND NEW INSPIRATION. I NEED A DESTINATION WITH A WIDE RANGE OF ACTIVITIES THAT KEEPS ME PHYSICAL ACTIVE.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

The core meaning of going on holiday is to give me **new inspiration**. Of course it should also make me feel **full of energy**.

DESTINATION; WHAT AM I LOOKING FOR?

I want to go to a place that offers a wide range of possible **activities** also for kids. A destination that allows me to be **physical active**. It should also be **easy to travel around**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **active, daring** and **explorative**.

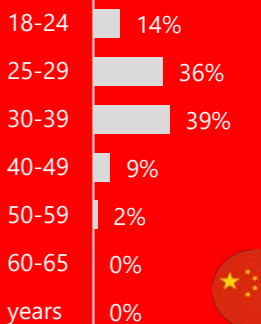
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who want to have **strong family values** who have an active and **busy social life**.

50%
ARE BELOW
30 YEARS



SHARE OF
OVERNIGHT
STAYS
8%



ENERGY

TYPICAL HOLIDAY OCCASIONS

As in most segments you will find the typical sun and beach vacation, and holidays to experience nature, scenery and wildlife in this segment, but you will also find that **health travels** are very popular!

HOLIDAY EXPERIENCE

This segments enjoy to observe beauty of nature, taste local food and drink, visit cities and restaurants as much as the next man. They also like to attend sightseeing tours and visit the countryside.

I TRAVEL TO GET ENERGY

These consumers choose destinations that enables them **get new inspiration and** feel full of energy. They often travel in **larger groups** (3 or more) with **friends** and with **children**, so the **social** element is also important. They travel by plane and often rent a car at their destination. Mostly they stay in hotels or rented **cabin/holiday home**.

SOURCES OF INSPIRATIONS

These consumers don't spend a lot of time planning where to go. Most of them settle for the trip less than **4 weeks before they go** (69%). Their main source of information is the **internet in general**. I.e. it will be important to use **search engines** as a vehicle to reach this segment. Their spouse/partner, **children, friends** and acquaintances heavily **influences their choice**.

THE ROLE OF BRANDS

The energy segment is important for brands who position themselves as **vital** and **energetic** and who are always **pushing the boundaries** and stimulating consumers with change and **challenge**. A brand that wants to adopt a Vitality strategy needs to position itself as inquisitive and **curious** about the world, a brand that is entertaining, **surprising** and sometimes perhaps even shocking for its (temporary) consumers. It is important for these brands to offer **constant renewal**.



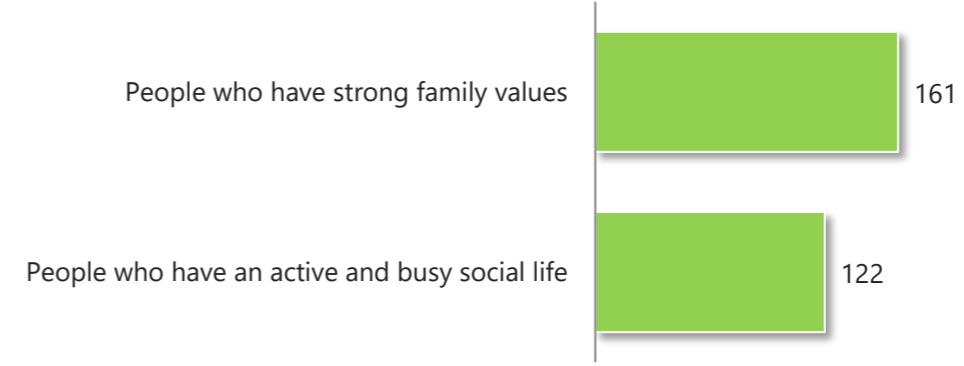
ENERGY

Core motivations

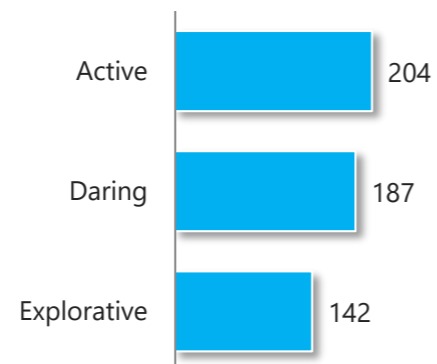
Emotional Benefits



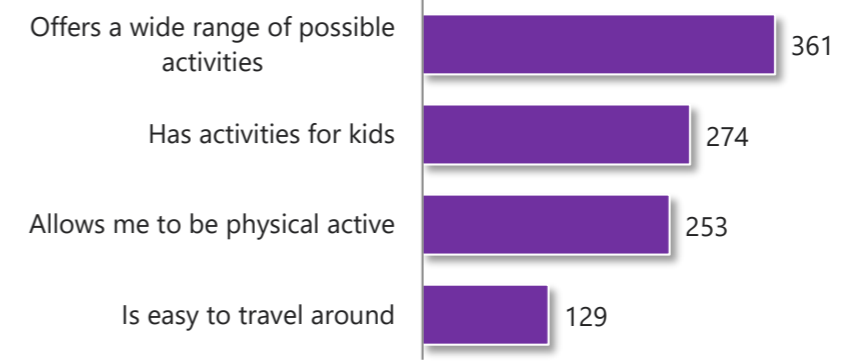
Social Identity



Personality



Destination features



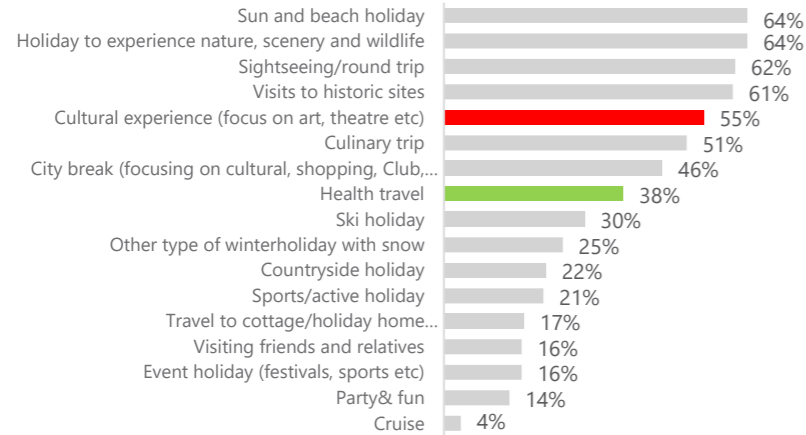
SEGMENT PROFILE – ENERGY

■ Significantly over indexed in segment
■ Significantly under indexed in segment

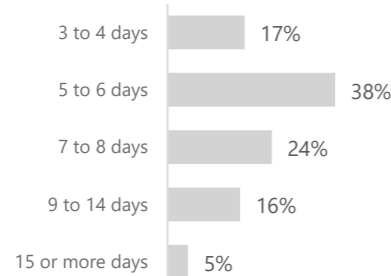
TYOLOGY



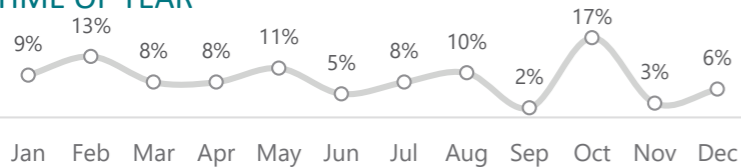
TYPE OF HOLIDAY



DURATION



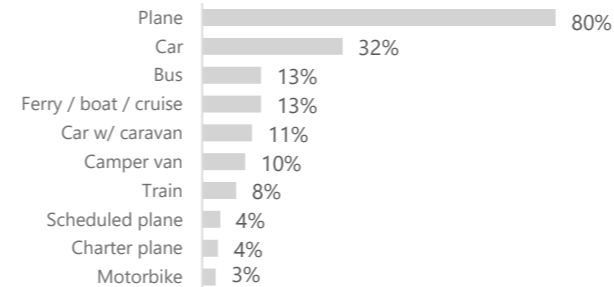
TIME OF YEAR



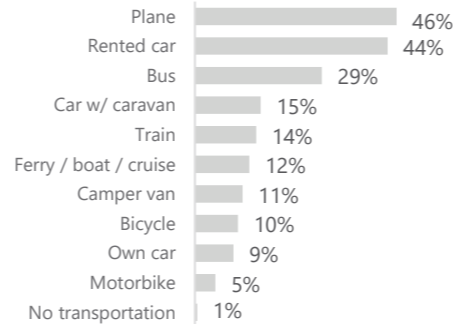
TRANSPORT AND ACOMMODATION



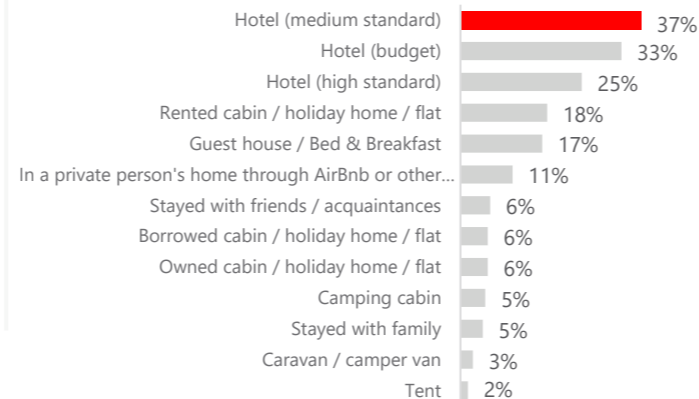
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



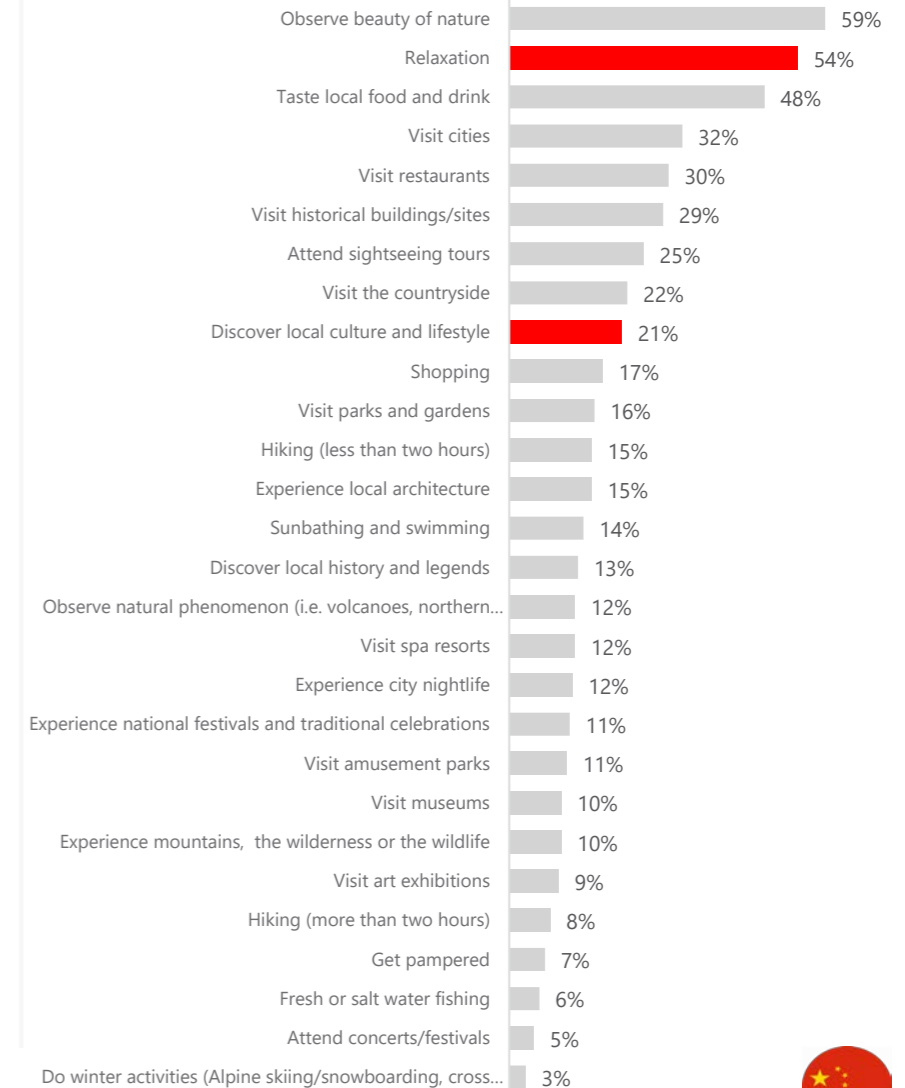
ACCOMMODATION



ACTIVITIES



ACTIVITIES



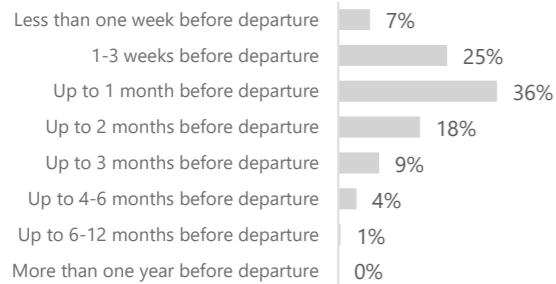
SEGMENT PROFILE - ENERGY

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■ Significantly under indexed in segment

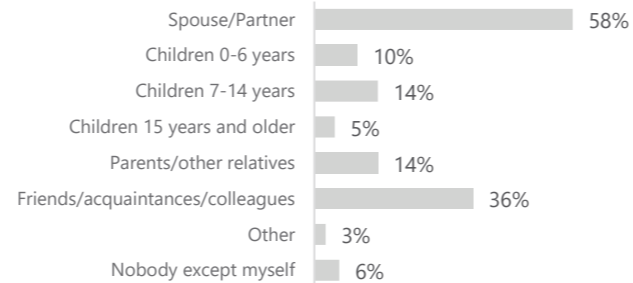
PLANNING



DECISION MADE



INFLUENCERS



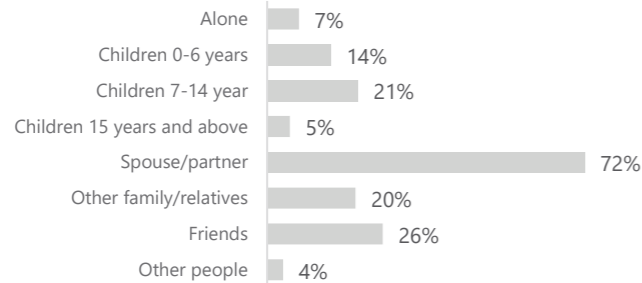
INFORMATION SOURCES



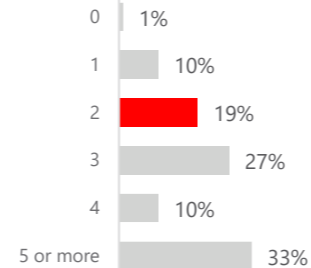
TRAVEL COMPANIONS



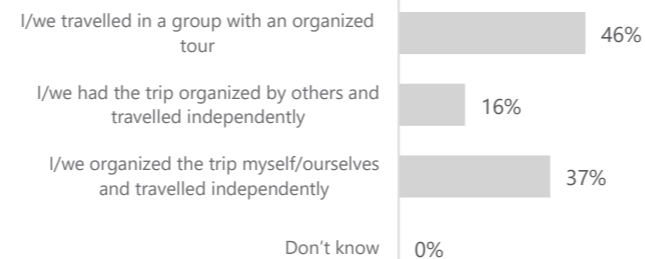
WHO DID YOU TRAVEL WITH



NUMBER OF TRAVEL COMPANIONS

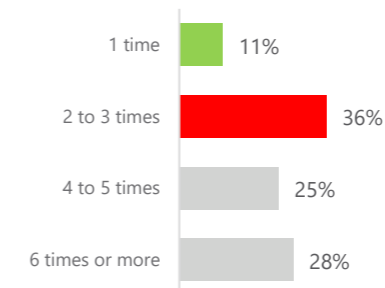


HOW DID YOU TRAVEL

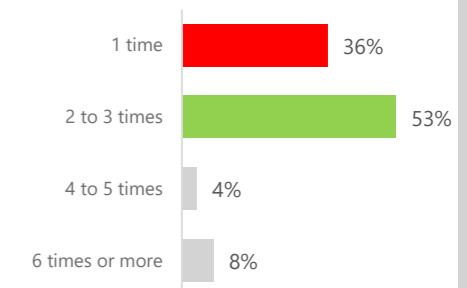


TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

NUMBER OF TIMES ABROAD



NUMBER OF TIMES TO EUROPE



4

BRAND PROFILE OF NORWAY


Associations

Emotional benefits associated with Norway

Destination characteristics associated with Norway

Brand personality associated with Norway

Social identity associated with Norway



China and to a lesser extent the USA are a bit more clueless about Norway (in general); for them it's a very exotic destination – off the beaten track.

EMOTIONAL ASSOCIATIONS

Norway does not have a really rich and strong emotional footprint in China compared to other destinations.

Compared to other destinations the Chinese travelers lacks a clear emotional benefit for travelling to Norway.



DESTINATION CHARACTERISTICS

The Chinese travelers are quite single minded on what differentiates Norway to other destinations in terms of functional delivery: not ruined by tourism and quiet environments.



BRAND PERSONALITY

In China, Norway has a quite slim brand personality.

For the Chinese traveler Norway is first and foremost seen as the “EXPLORATIVE” destination compared to other destinations.

Who
am i?



SOCIAL IDENTITY

Norway has a rather one dimensional footprint when it comes to social identity in the US.

Compared with other destinations, Norway is the destination for people that like to do things the unconventional way.

So a quite precise and pinpointed but not so multi faceted image of Norway.

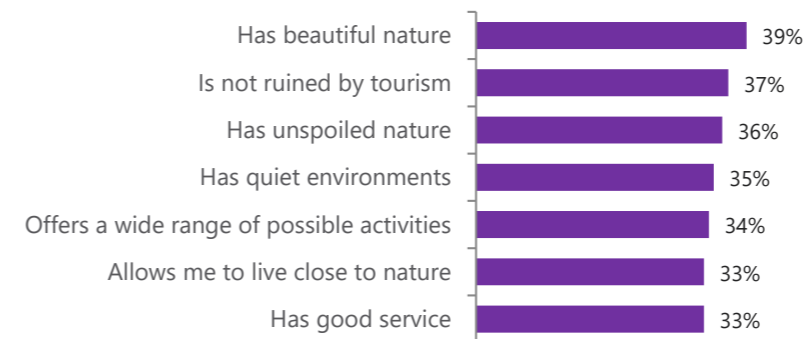


TOP ASSOCIATIONS TO NORWAY ON ALL FOUR FACETS

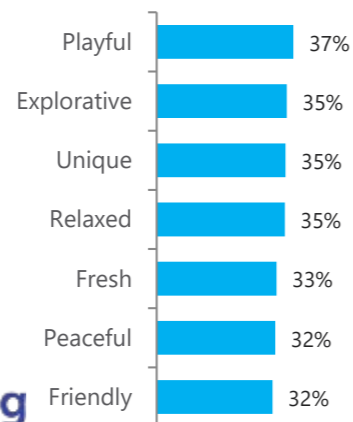
EMOTIONAL ASSOCIATIONS



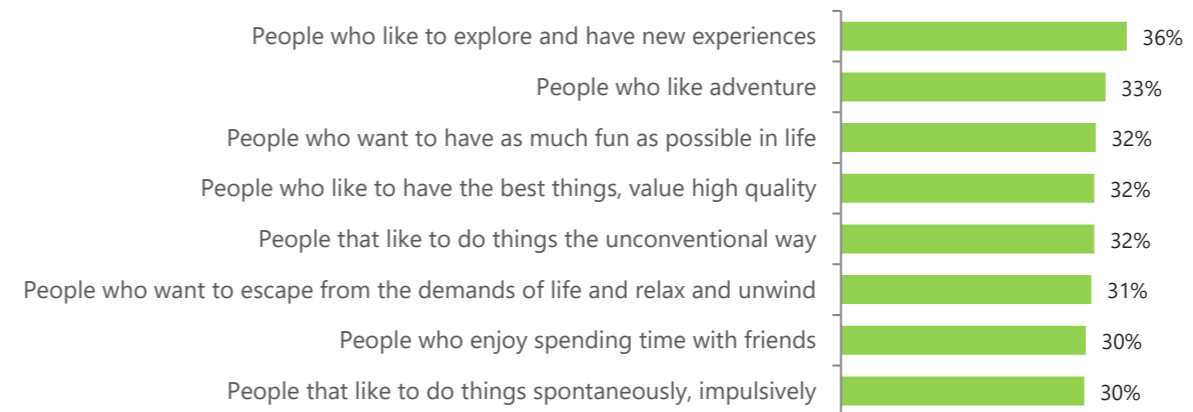
DESTINATION CHARACTERISTICS



BRAND PERSONALITY



SOCIAL IDENTITY



5

THE COMPETITIVE LANDSCAPE

Visits and repeat visits

Strengths and weaknesses

NORWAY'S FIT TO SEGMENTS IN ALL MARKETS

A clear fit to «Exploring the world of natural beauty» in most markets

	Broadening My Cultural Horizon	Extravagant indulgence	Escape	Exploring the World of Natural Beauty	Sharing & Caring	Control	Energy	Playful Liberation	Social Immersion
UK	0.22	-0.19	0.23	0.51	-0.35	-0.16	-0.07	-0.19	-0.06
GERMANY	0.13	-0.09	0.24	0.51	-0.39	-0.14	-0.02	-0.10	-0.16
USA	0.45	-0.34	0.25	0.32	-0.08	-0.26	-0.09	-0.31	0.21
DENMARK	-0.27	-0.22	0.29	-0.24	0.19	0.50	0.05	0.02	-0.26
SWEDEN	-0.25	-0.15	0.14	-0.09	0.01	0.54	0.00	0.04	-0.28
CHINA	0.07	-0.03	0.14	0.35	-0.27	-0.17	-0.05	0.06	-0.24
SPAIN	0.07	0.03	0.19	0.27	-0.32	0.12	-0.13	-0.03	-0.28
ITALY	0.08	-0.03	0.21	0.37	-0.38	-0.06	-0.05	0.10	-0.19
NETHERLANDS	0.09	-0.17	0.28	0.43	-0.25	-0.05	0.13	-0.15	-0.19
FRANCE	0.06	-0.11	0.26	0.36	-0.36	0.03	-0.09	-0.06	-0.19
AVERAGE	0.06	-0.13	0.22	0.28	-0.22	0.03	-0.03	-0.06	-0.16

Good fit
Neutral fit
Bad fit

OVERVIEW DESTINATIONS FIT IN THE CHINESE MARKET

Segments/ destinations	Playful Liberation	Social Immersion	Sharing & Caring	Escape	Control	Broadening My Cultural Horizon	Adventures in the World of Natural Beauty	Extravagant indulgence	Energy
Austria	-0.10	-0.24	-0.11	-0.09	-0.03	0.06	0.05	0.24	-0.08
Canada	-0.05	-0.10	-0.09	-0.02	0.09	-0.21	0.05	0.15	-0.01
Denmark	0.06	-0.11	-0.17	0.02	0.01	0.09	0.13	0.04	-0.19
Finland	0.13	-0.13	-0.18	0.12	0.10	0.02	0.11	0.03	-0.15
France	0.02	-0.05	-0.01	-0.17	-0.27	0.04	-0.28	0.49	-0.13
Germany	-0.13	-0.23	-0.10	-0.30	0.29	0.04	-0.21	0.34	-0.17
Iceland	-0.03	-0.32	-0.32	-0.07	0.01	0.00	0.40	0.03	0.12
Italy	0.03	-0.05	-0.23	-0.20	-0.07	0.14	-0.10	0.32	-0.25
Netherlands	-0.01	-0.05	-0.23	0.03	-0.26	0.22	0.32	-0.03	-0.03
New Zealand	0.01	-0.29	0.04	0.41	0.04	-0.22	0.12	-0.08	-0.11
Norway	0.06	-0.24	-0.27	0.14	-0.17	0.07	0.35	-0.03	-0.05
Portugal	0.06	0.22	0.01	-0.27	0.01	0.08	-0.07	-0.02	0.09
Russia	-0.06	0.23	-0.15	-0.14	-0.23	0.35	0.27	-0.16	-0.04
Scotland	-0.14	-0.15	-0.21	-0.22	0.21	-0.07	0.26	0.05	-0.06
Sweden	0.07	-0.05	-0.23	-0.08	-0.01	0.01	0.21	0.12	-0.12
Switzerland	-0.07	-0.32	-0.05	0.18	-0.12	0.08	-0.03	0.29	-0.23
Thailand	0.17	0.30	0.17	0.07	-0.12	-0.05	0.00	-0.35	0.06
USA	-0.09	-0.04	-0.27	-0.49	-0.11	0.00	0.10	0.33	0.19



6

GLOBAL RECOMMENDATIONS

Brand positioning

THE TASK AT HAND



The strategy to make Norway occupy a unique and credible position, relative to competing destinations, in the mind of the tourist.

IN CONCLUSION ...

NORWAY NEEDS TO DIVERSIFY IT'S RELEVANCE AS A HOLIDAY DESTINATION

1

WE SEE A FURTHER FRAGMENTATION OF NEEDS IN THE HOLIDAY SEGMENTATION

- We have 9 decent size segments today
- There are important differences by market

2

NORWAY CONNECTS REASONABLY WELL WITH MULTIPLE NEEDS

- Highly relevant for one segment
- Relevance for additional 5 segments

3

IT'S THE ONLY WAY TO STAY COMPETITIVE

- Competitive destinations too are playing on multiple needs
- Nature is a highly competitive area

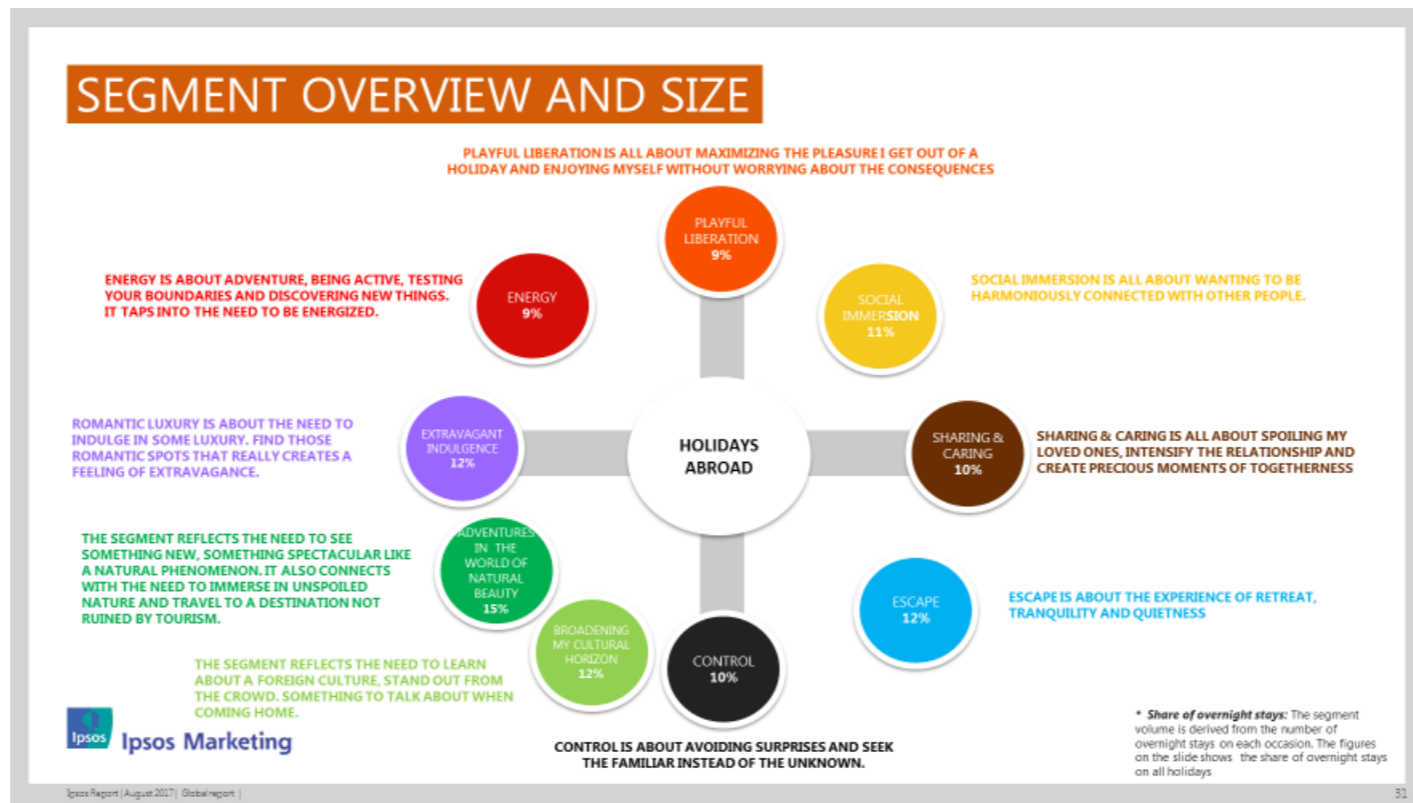
4

NORWAY HAS A LOT TO OFFER

- Norway is already associated with a wide variety of holiday needs & activities
- The whole of Norway, the whole year round

WE SEE A FURTHER FRAGMENTATION OF HOLIDAY NEEDS

We have 9 decent size segments today (vs only 5 >6% in 2011)



WE SEE A FURTHER FRAGMENTATION OF HOLIDAY NEEDS

There are a lot of differences in size by market

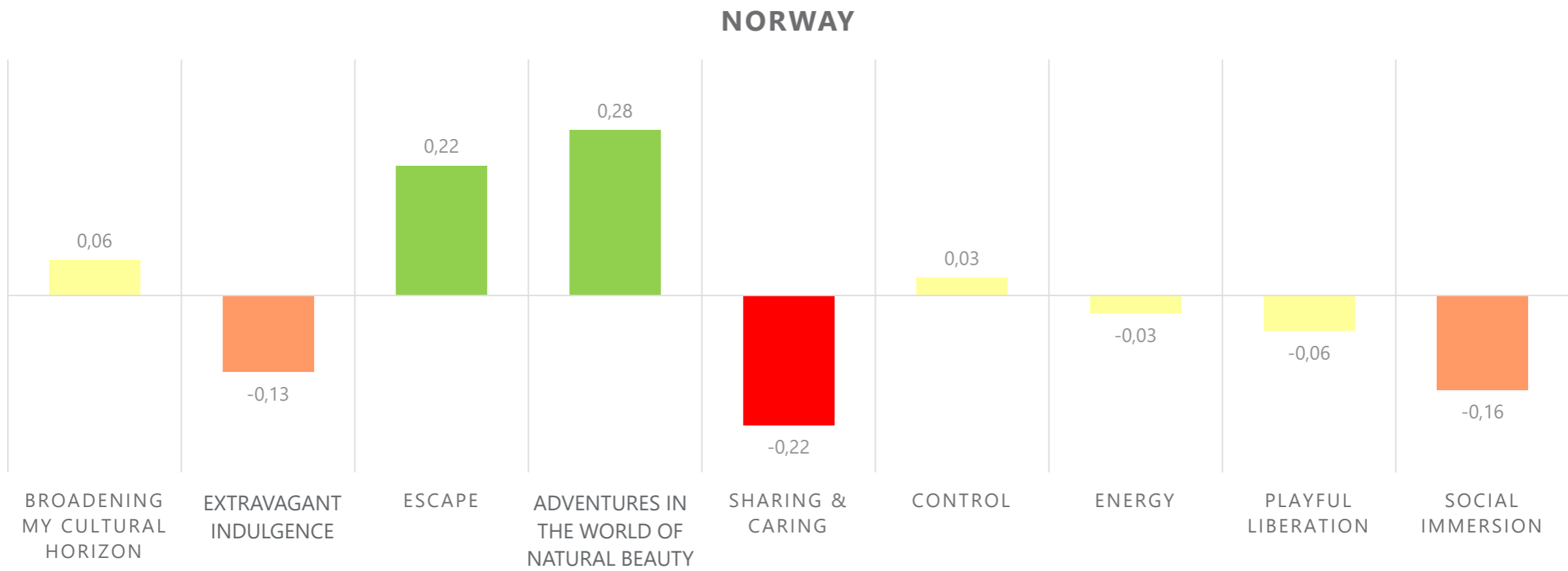
TOP 3 (% overnight stays*)

US	UK	Denmark	Sweden	China	Spain	Italy	Nether-lands	France	Germany	GLOBAL
				26%		19%				9%
	13%		12%					13%	14%	11%
	14%						19%			10%
	13%	17%					12%		21%	12%
17%				16%	15%					10%
		13%	14%					21%		12%
13%		18%	18%		14%	14%	22%	19%	14%	15%
24%				23%	16%	13%				12%
										9%

* Share of overnight stays: The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays.

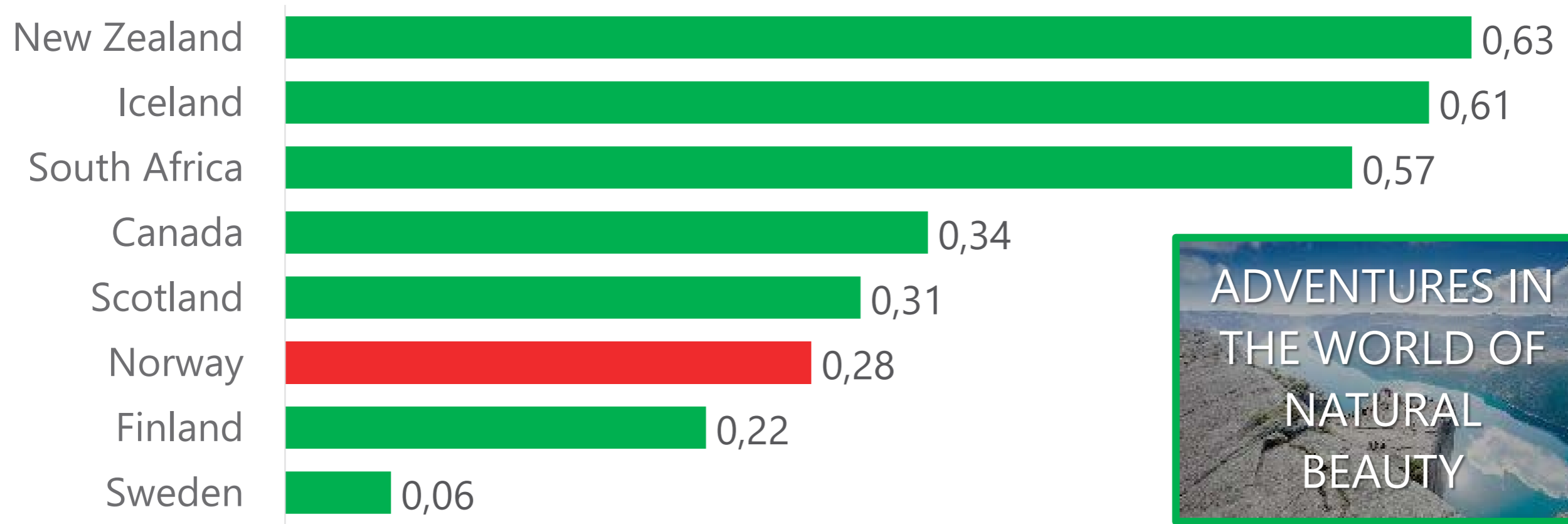
NORWAY CONNECTS WELL WITH MULTIPLE NEEDS

Highly relevant for one segment, decent relevance for additional 5 segments



DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Nature is a highly competitive area



DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

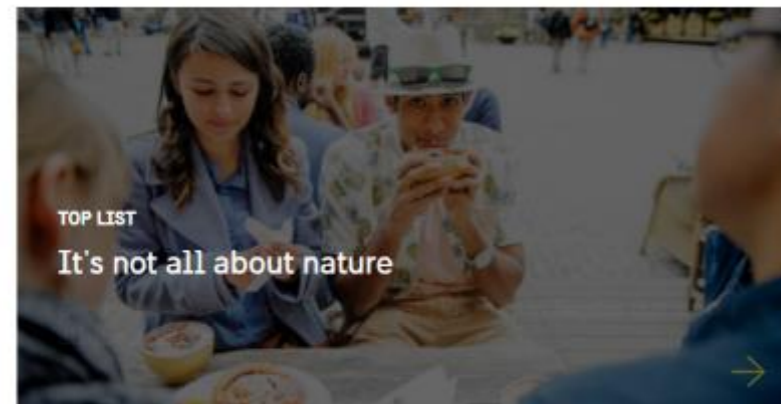
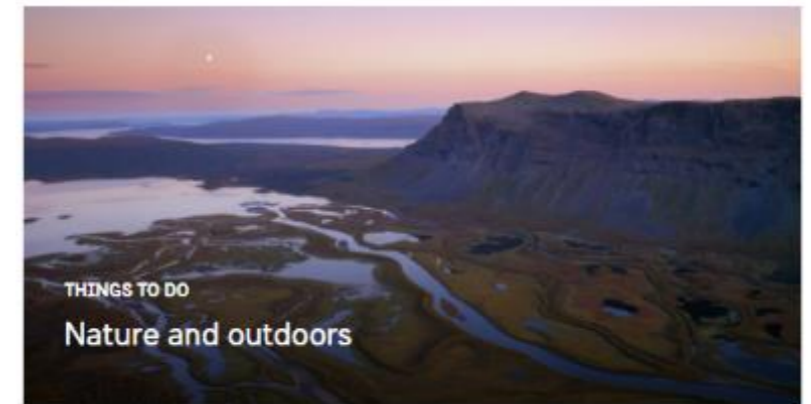
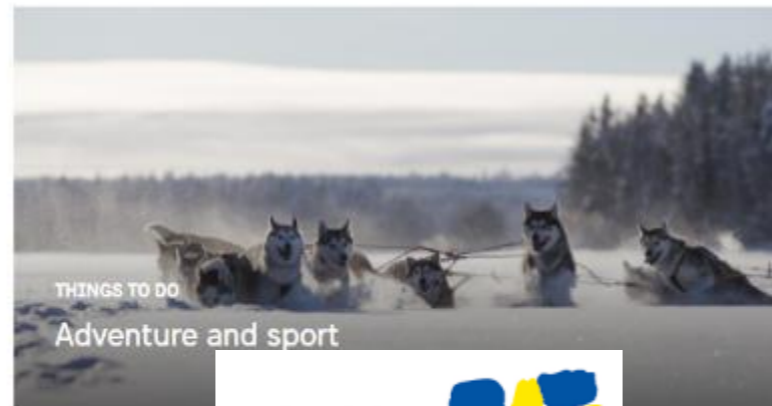
Competitive destinations too are playing on multiple needs

The screenshot displays the '100% PURE NEW ZEALAND' website. The main navigation bar includes 'Destinations', 'Things to do', 'Facts', 'Travel to NZ', 'Recommended trips', 'Transport', and 'Accommodation'. A large hero image features a blue helicopter over a lake with a 'LUXURY' text overlay. Below this are several smaller tiles for different experiences:

- Top luxury experiences**: A woman in a helicopter cockpit. Text: "New Zealand offers luxurious, bespoke experiences, making it a destination perfect for..."
- Luxury accommodation**: A modern house by a lake.
- New Zealand's Marquee Golf Courses**: A golfer on a green.
- Exclusive Walking and Hiking**: Hikers on a mountain trail.
- World-class Wine and Cuisine**: A man and woman at a dining table.
- Private Fly Fishing**: A person fishing in a river.
- Super yacht cruising**: Sailing yachts on the water.

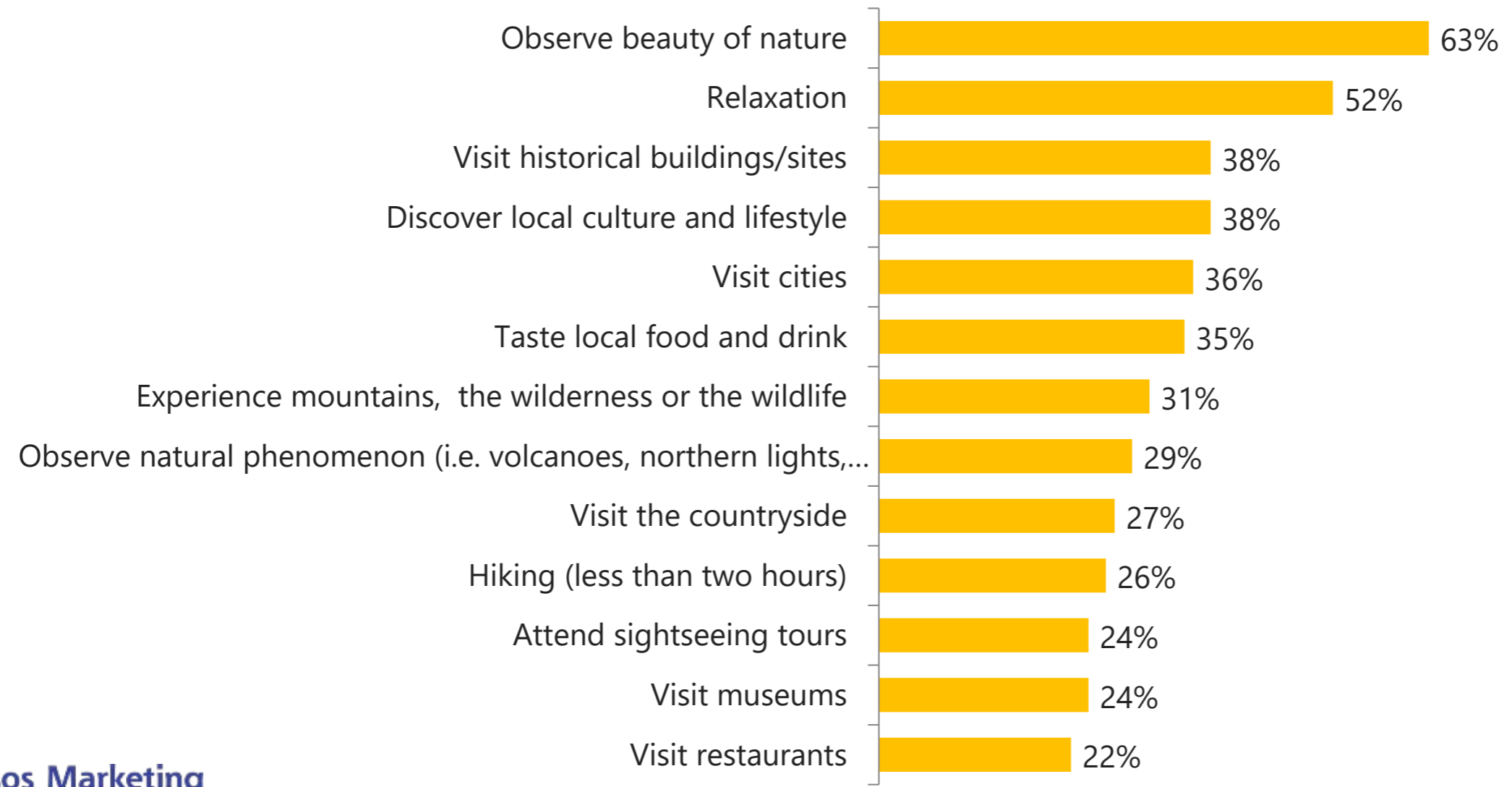
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs



NORWAY HAS A LOT TO OFFER

Norway is used for a wide variety of holiday needs & activities



NORWAY HAS A LOT TO OFFER

This fits with the ambition to promote "the whole of Norway, the whole year round"





RECOMMENDATIONS FOR CHINA

Where do we go from here?

NORWAY NEEDS TO CONTINUE TO WORK ON HOLIDAY BASICS IN CHINA

Norway fails to meet some basic holiday expectations

Good value for money

New and interesting places, rich experiences, interesting sights



Escape from hectic daily life

Easy to travel to, easy to travel around

Rich cultural heritage and interesting sights, culture and art

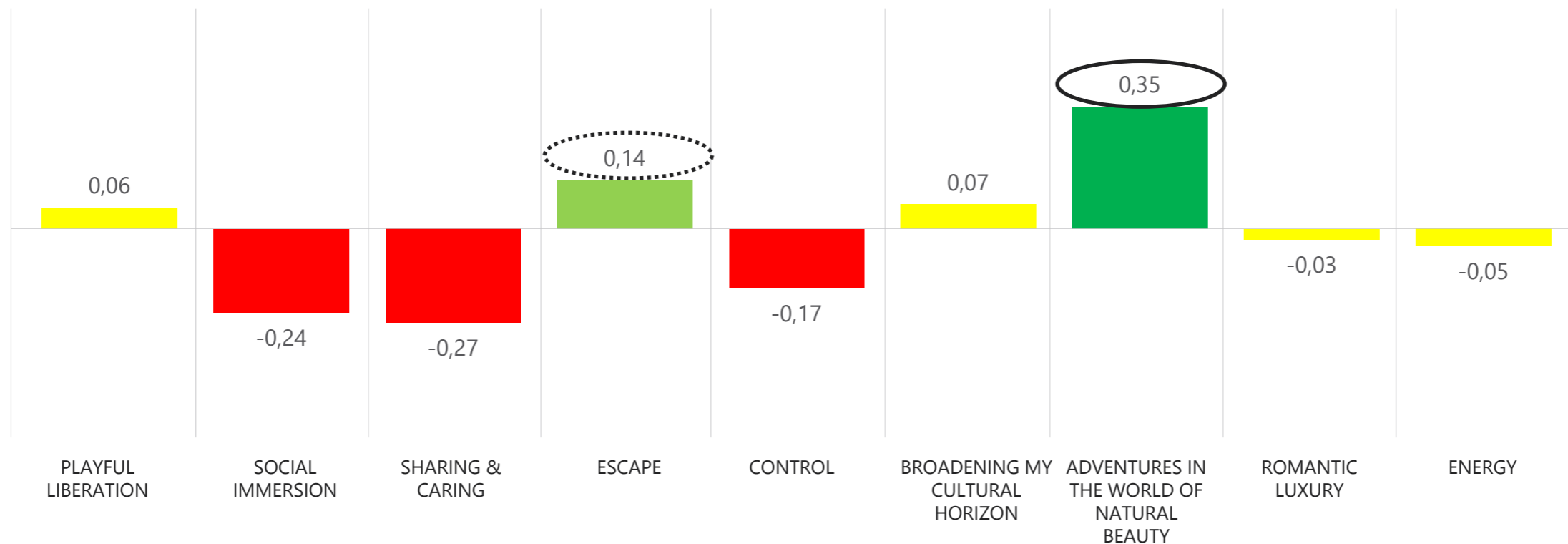
Cozy, Authentic, Relaxed, Friendly and Sociable

People who like to explore and have new experiences



NORWAY CONNECTS WELL WITH MULTIPLE NEEDS IN CHINA

Highly relevant for two segments, and very decent relevance for additionally two segments



LOOKING AT NORWAY'S CURRENT STRENGTHS

AND POSITION DIFFERENT ROUTES THAT CAN BE EXPLORED

THE OBVIOUS TARGET



POSSIBLE ADDITIONS



Norway's nature is a perfect place for Chinese travelers to escape from their hectic daily life, pamper themselves and restore their sense of harmony and balance. A peaceful and harmonious place to revitalize themselves.

«BROADENING MY CULTURAL HORIZON» and «PLAYFUL LIBERATION» could also be worth looking at when developing concepts for the Chinese market.



QUESTIONS?

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