



# ACTIVATING THE NORWAY BRAND

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

*Written by Kjetil Strømseth and Steven Naert*  
16<sup>th</sup> of October 2017

# CONTENT

- 1) The philosophy behind p 6
- 2) The ideal holiday p 19
- 3) Segments p 30
- 4) Brand profile Norway p 91
- 5) The competitive landscape p 97
- 6) Global recommendations p 100
- 7) Recommendations for Denmark p 111



# 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

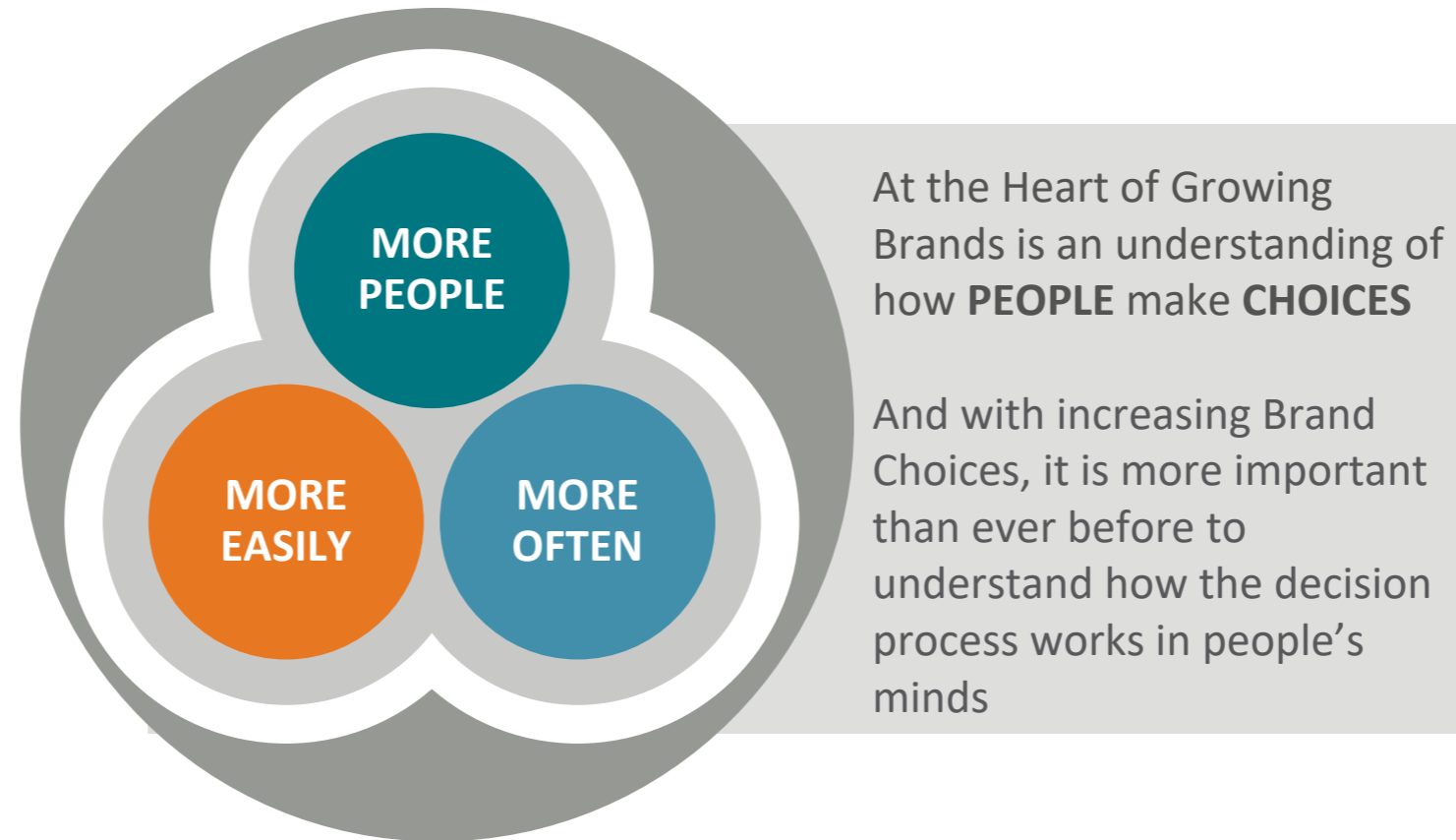
**Point of view & approach**



Ipsos Marketing

# THE STARTING POINT: UNDERSTANDING HOW BRAND BUILDING WORKS

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



# 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*



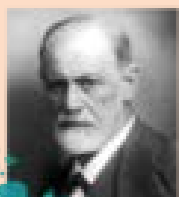
## Censydiam Motivational Framework

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.

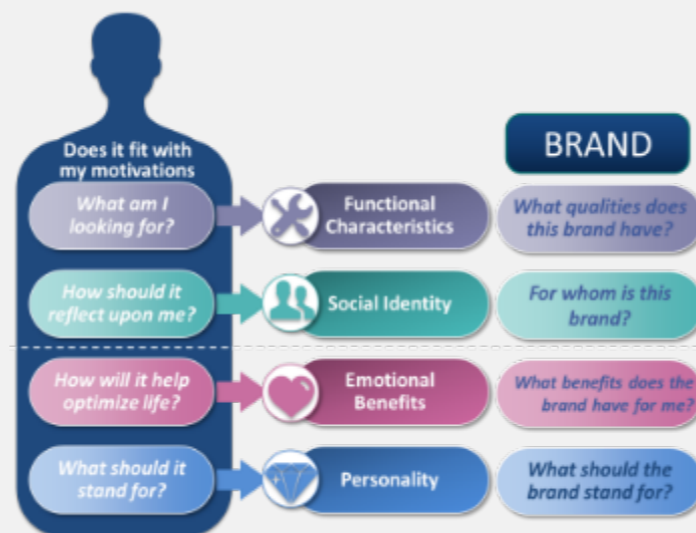
# CENSYDIAM IN A NUTSHELL



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



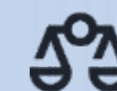
## **Customizable**

Needs are tailored by context, category and markets.



## **Validated**

Over 30+ years experience across the globe & scientific thesis

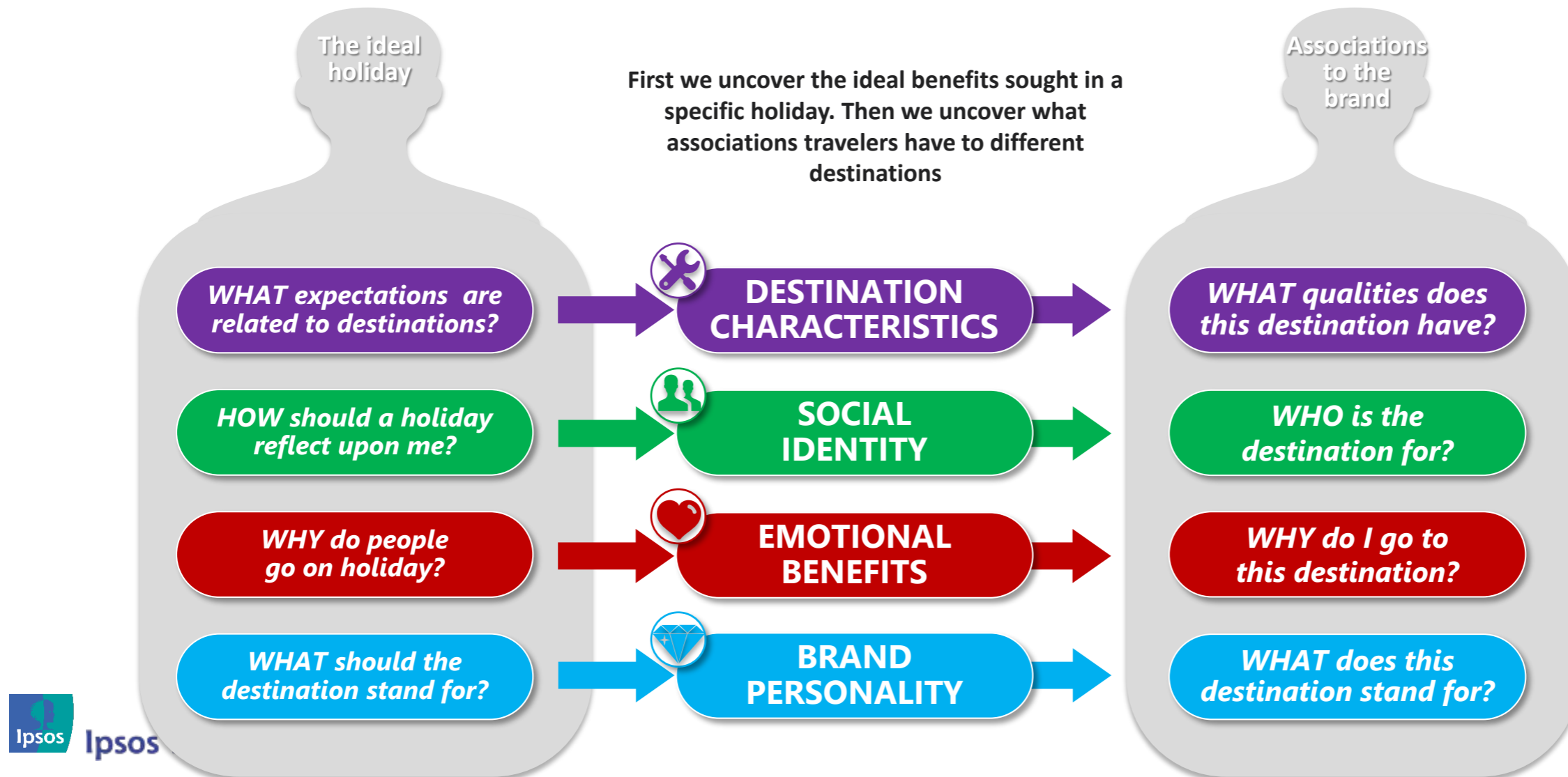


## **Comparison**

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

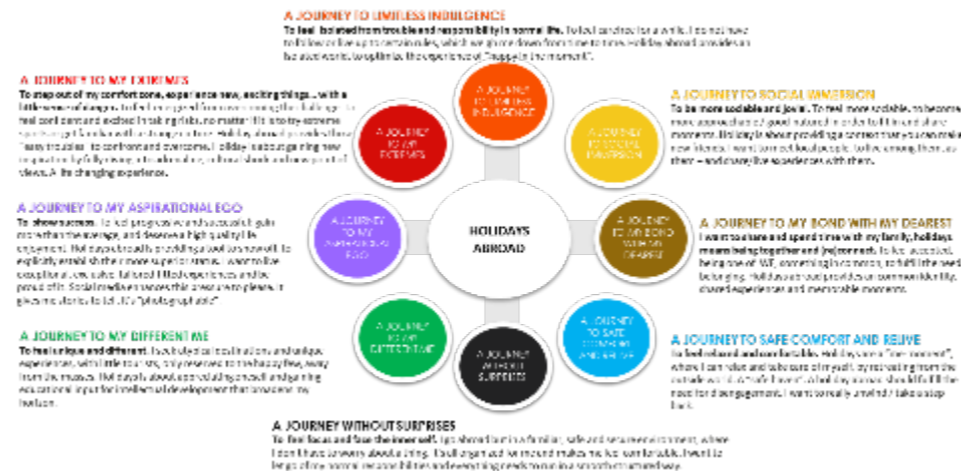
WE HAVE CONDUCTED 1200 INTERVIEWS IN THE MARKET

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.

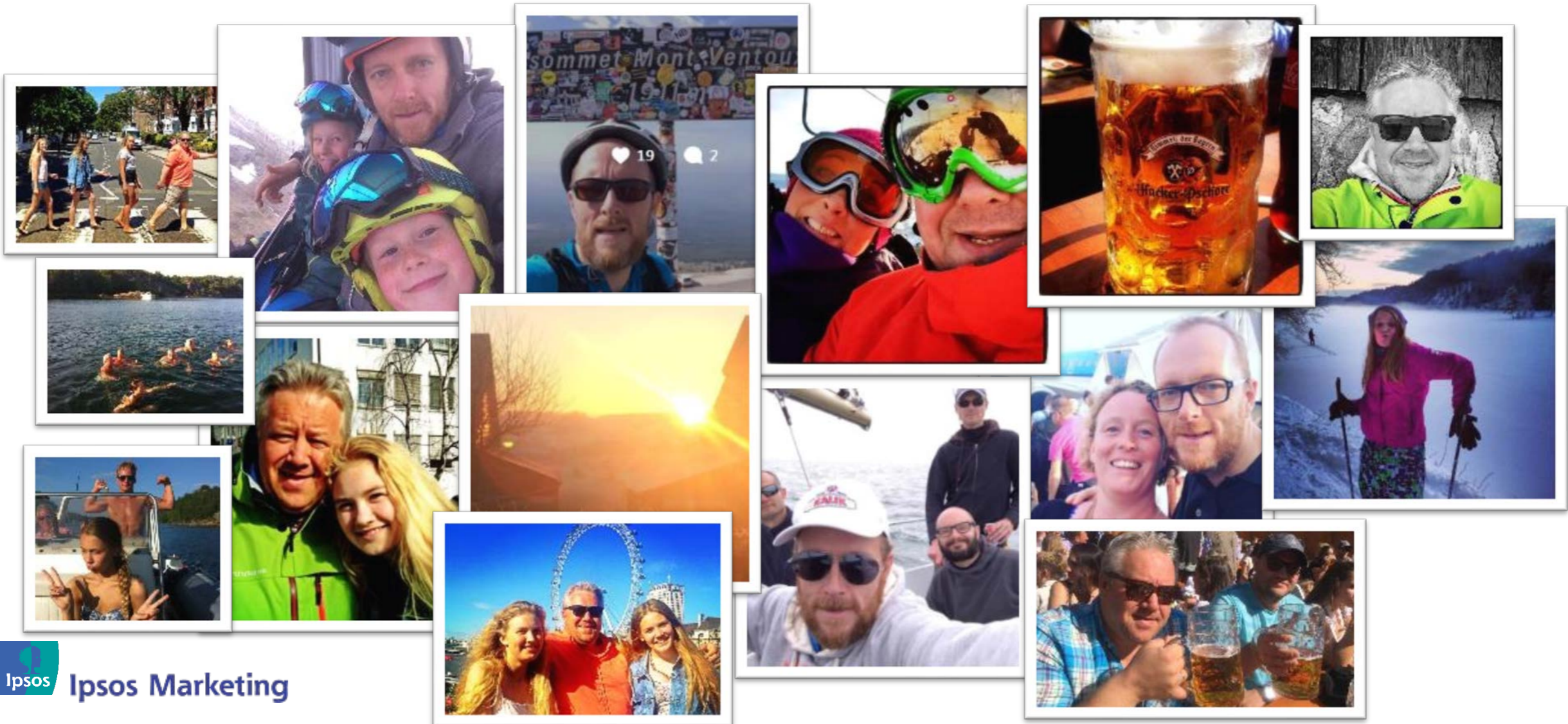


3. At this stage this hypothesis have been tested quantitatively in several markets to create one global segmentation model.



# 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



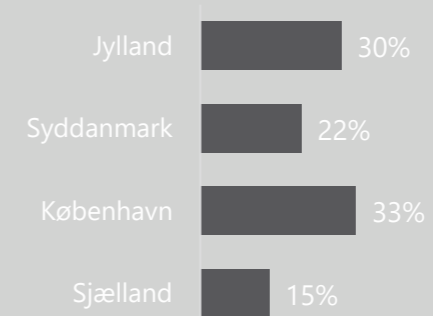
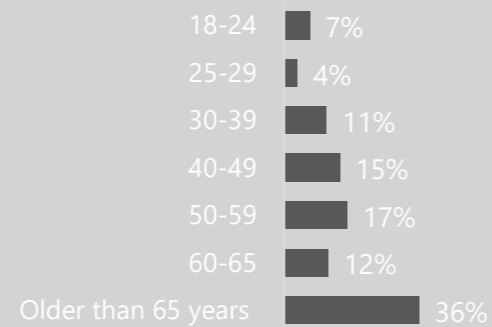
AND NOW THE RESULTS...



Ipsos Marketing

SAMPLE N = 2192

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





# 2

## THE IDEAL HOLIDAY EXPERIENCE

Category needs in the total Danish 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

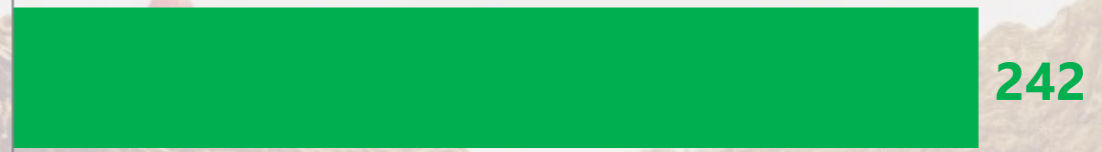


# IDEAL SOCIAL IDENTITY

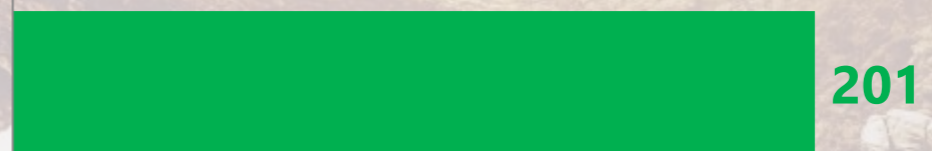
HOW should a holiday reflect upon me?



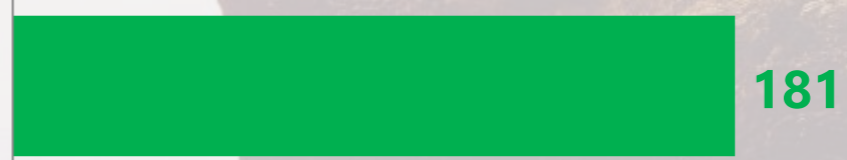
People who like to explore and have new experience...



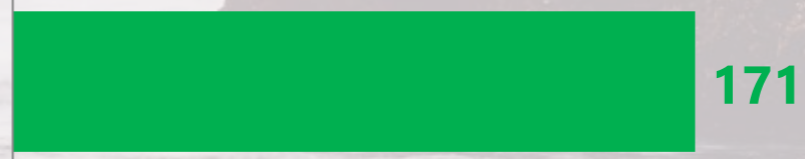
People who want to escape from the demands of life...



People who enjoy spending time with friends



People who are interested to learn more



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



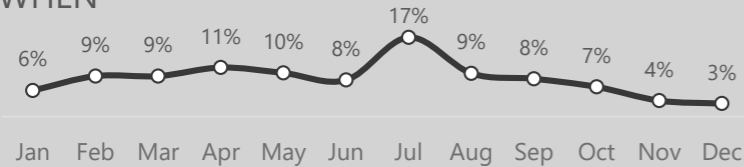
# CATEGORY BEHAVIOR

**With whom, how, when...**

# WHEN, WHO, HOW, WHERE

## Highlights on German category behavior

### WHEN



*People travel all year long  
- Off course a peak in summertime*

### WITH WHOM

**64%**

*Spouse/partner*

### HOW

**65%**

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

### TYPE OF ACCOMODATION

**67%**

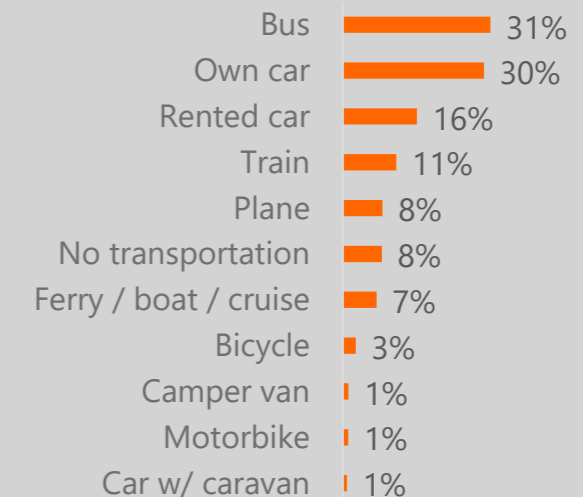
*Lived at a hotel, in most cases  
a medium standard hotel*

### TRANSPORTATION

**53%**

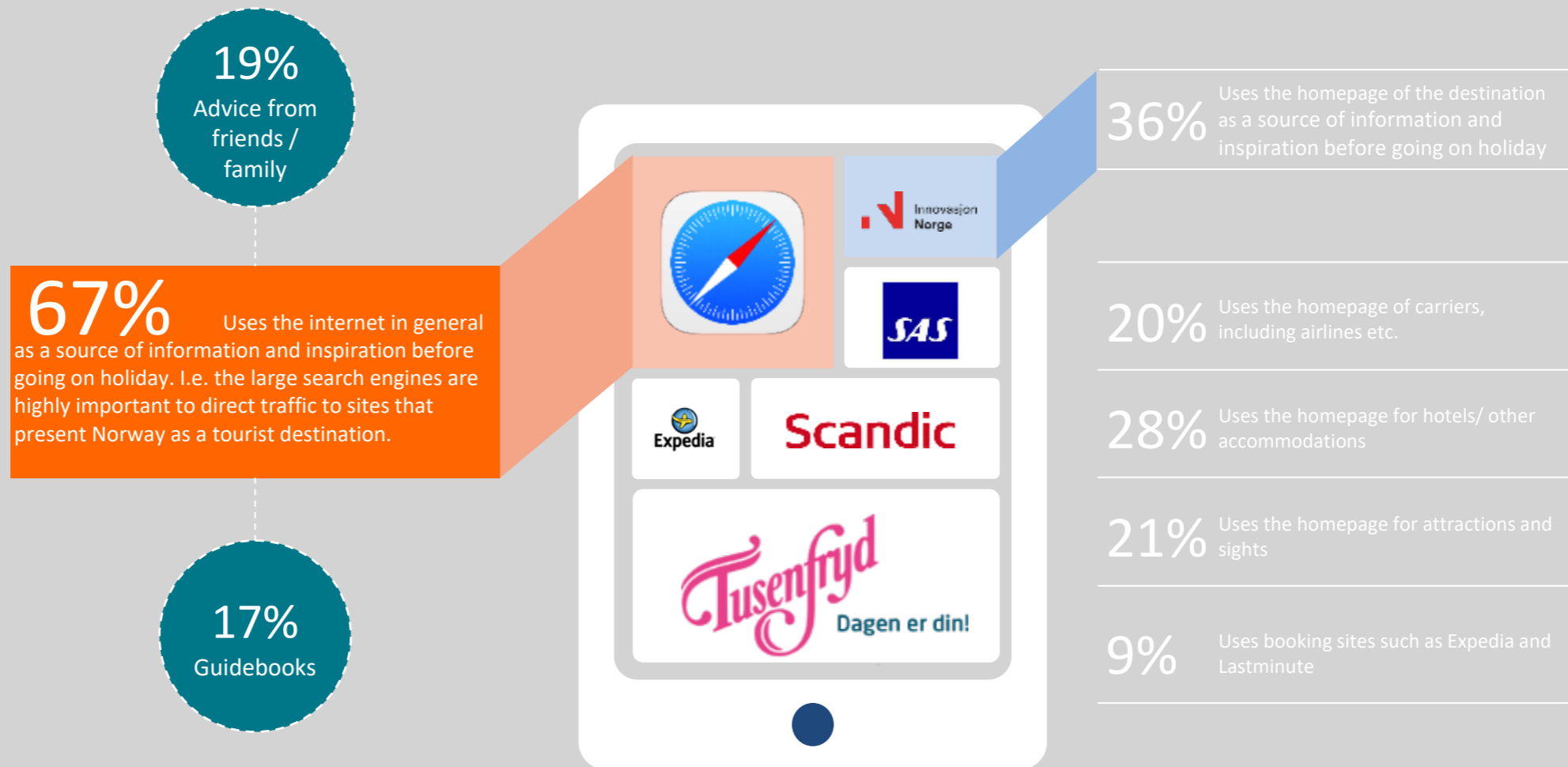
*Travels by plane*

### TRANSPORTATION DURING THE HOLIDAY



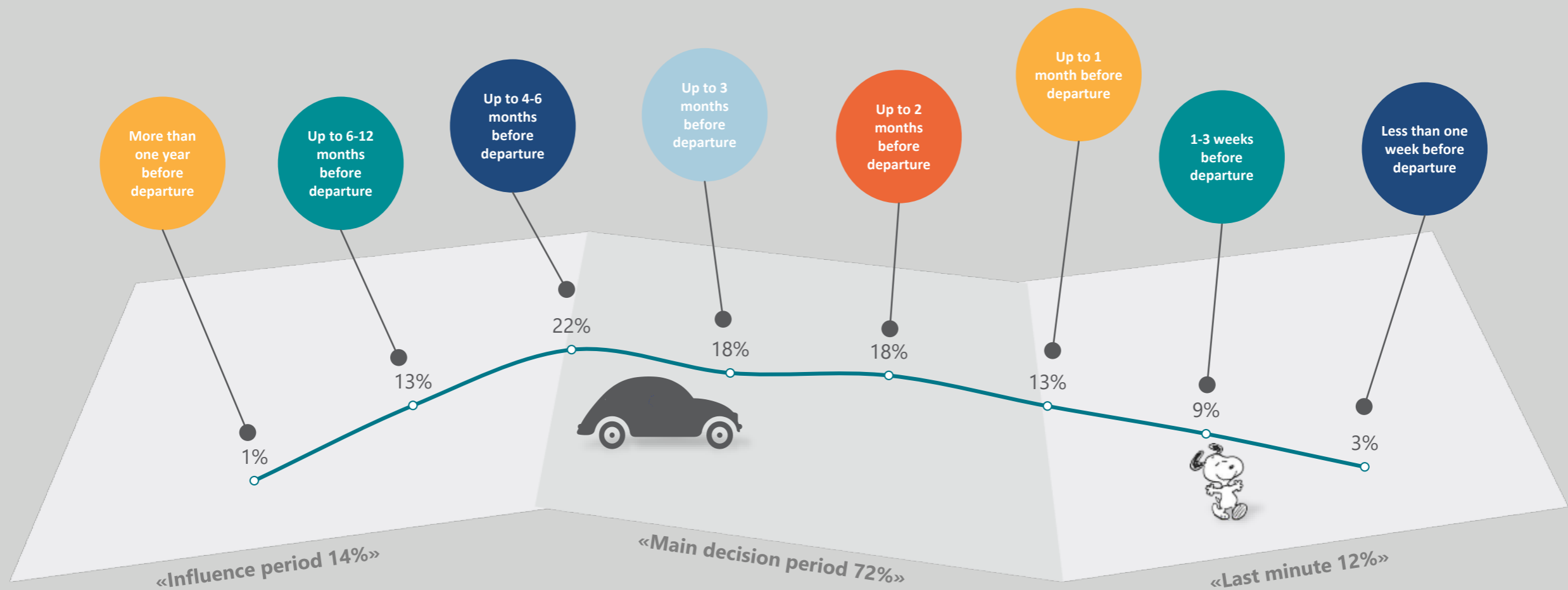
# SOURCES OF INFORMATION BEFORE AND DURING TRAVEL

## The digital channels are most important



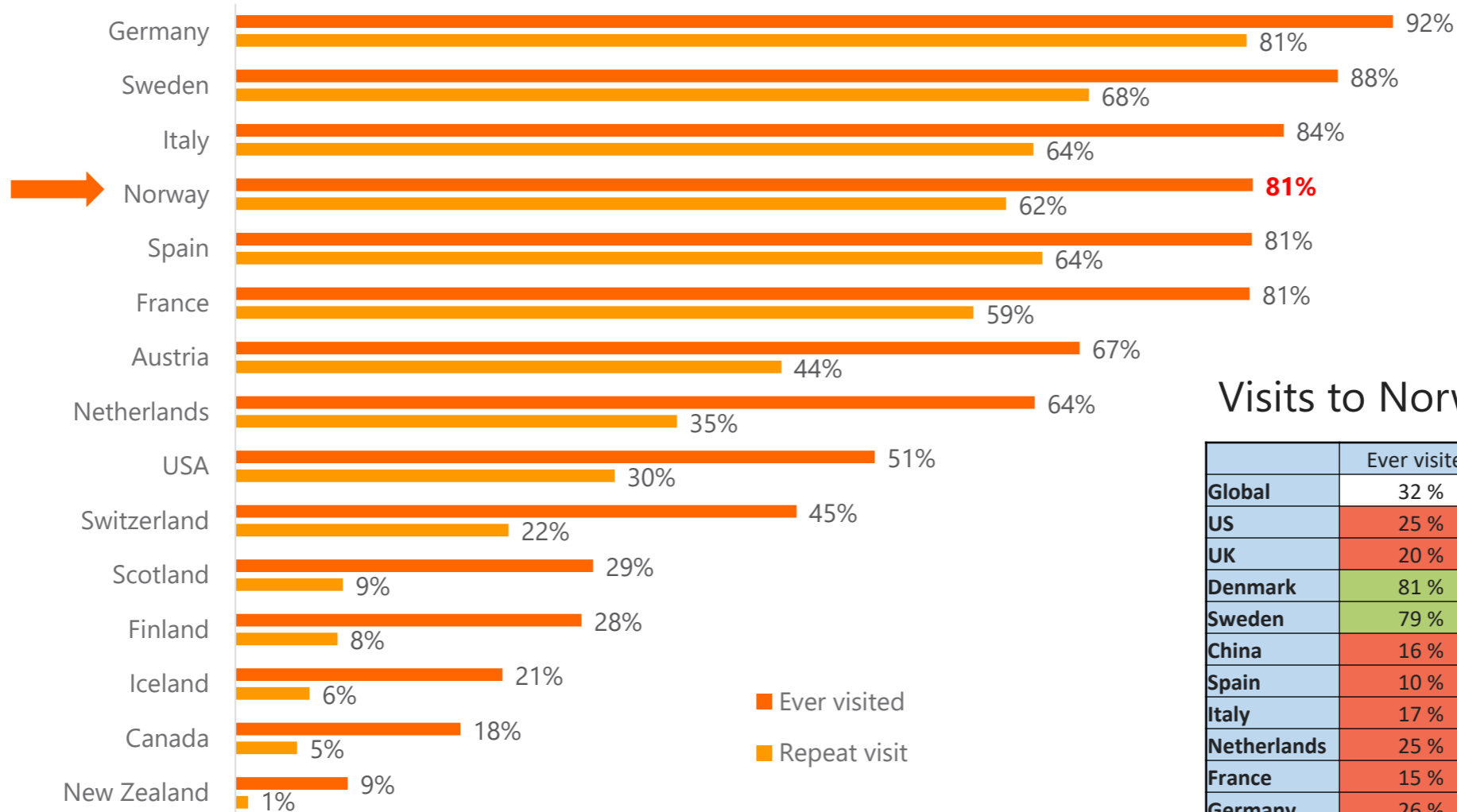
# MOST TRAVELS ARE DECIDED UPON BETWEEN 1-6 MONTHS IN ADVANCE

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



# EVER VISITED THIS COUNTRY?

## Most Danes goes to Germany



### 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

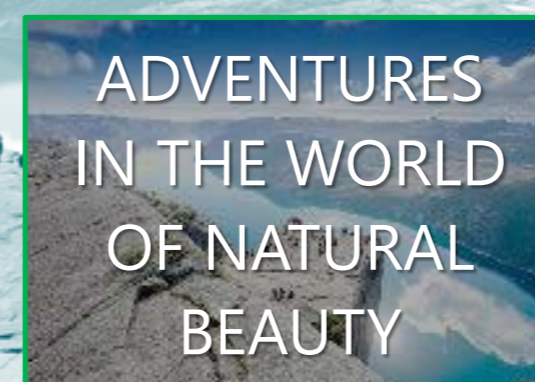
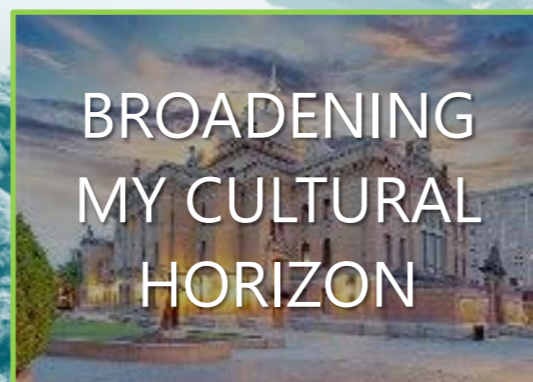
What

Who



Ipsos Marketing

# 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.

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.

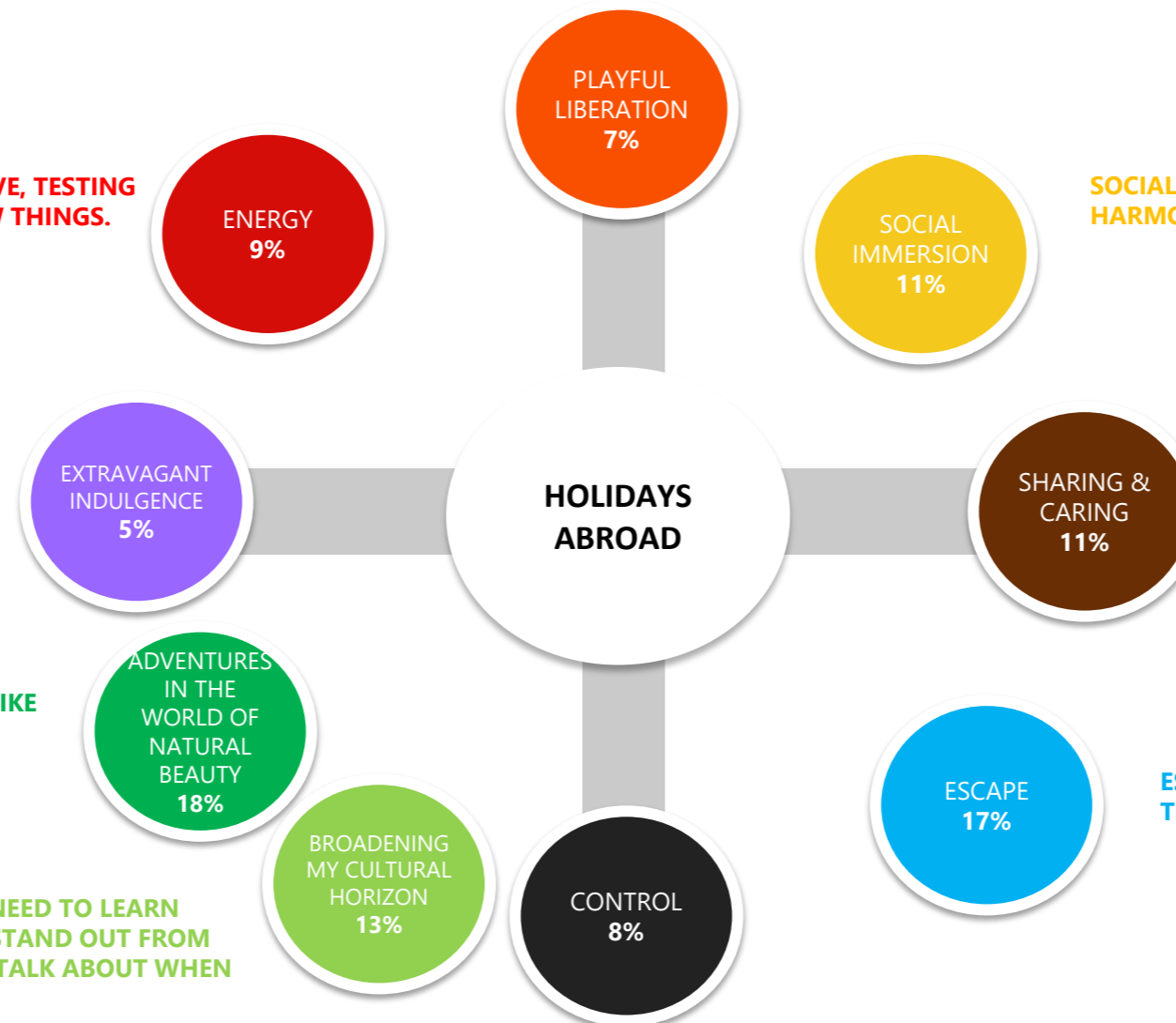
THE SEGMENT REFLECTS THE NEED TO LEARN ABOUT A FOREIGN CULTURE, STAND OUT FROM THE CROWD. SOMETHING TO TALK ABOUT WHEN COMING HOME.

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

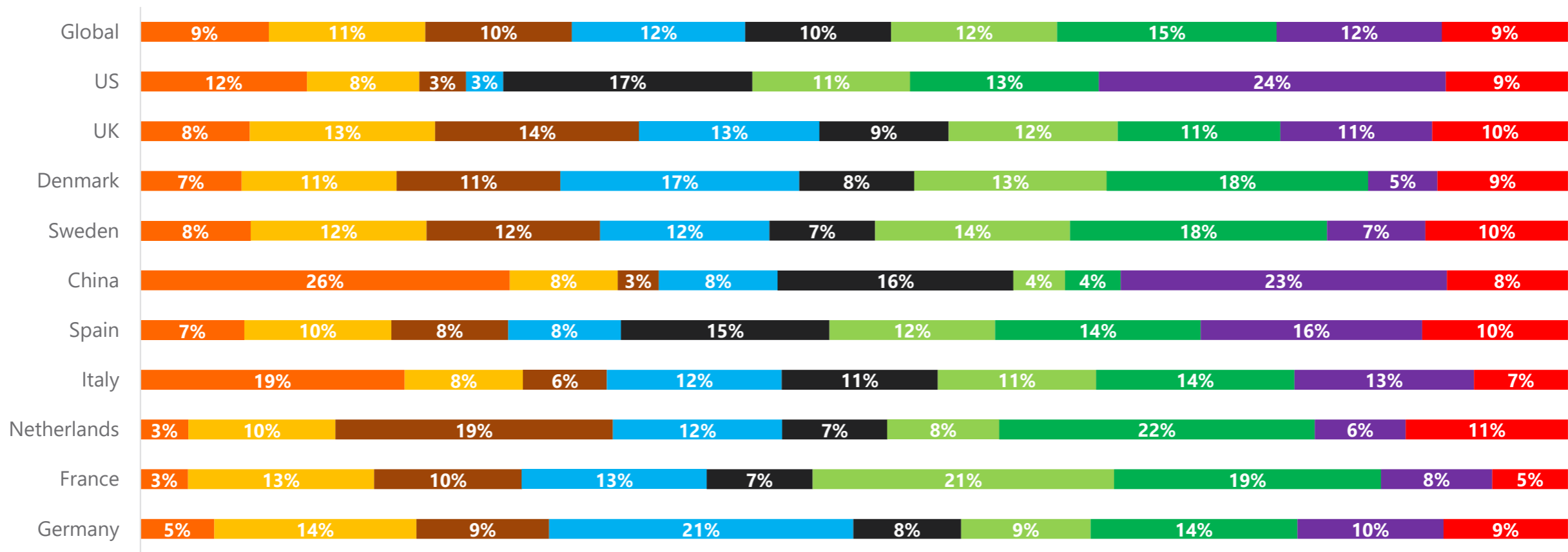
SOCIAL IMMERSION IS ALL ABOUT WANTING TO BE HARMONIOUSLY CONNECTED WITH OTHER PEOPLE.

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

ESCAPE IS ABOUT THE EXPERIENCE OF RETREAT, TRANQUILITY AND QUIETNESS



# SEGMENT SIZE\* PER MARKET



PLAYFUL LIBERATION

SOCIAL IMMERSION

SHARING & CARING

ESCAPE

CONTROL

BROADENING MY CULTURAL HORIZON

ADVENTURES IN THE WORLD OF NATURAL BEAUTY

EXTRAVAGANT INDULGENCE

ENERGY



Ipsos Marketing

\* 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 – DENMARK

## - 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	2192	171	213	289	373	192	324	289	117	224
Visits to historic sites	57 %	55 %	65 %	47 %	49 %	48 %	75 %	69 %	48 %	53 %
Holiday to experience nature, scenery and wildlife	55 %	47 %	58 %	40 %	60 %	42 %	52 %	81 %	38 %	62 %
Sun and beach holiday	50 %	61 %	45 %	58 %	56 %	44 %	33 %	48 %	58 %	57 %
Sightseeing/round trip	48 %	47 %	56 %	39 %	38 %	39 %	59 %	64 %	45 %	44 %
Cultural experience (focus on art, theatre etc.)	47 %	47 %	51 %	33 %	35 %	39 %	72 %	56 %	48 %	40 %
City break (focusing on cultural, shopping, Club, restaurant visits etc.)	36 %	37 %	34 %	39 %	33 %	30 %	41 %	30 %	37 %	38 %
Visiting friends and relatives	33 %	32 %	42 %	38 %	31 %	32 %	30 %	35 %	21 %	29 %
Culinary trip	18 %	14 %	26 %	13 %	14 %	15 %	19 %	21 %	27 %	14 %
Travel to cottage/holiday home (hired/own/borrowed cottage/holiday home)	17 %	16 %	16 %	20 %	24 %	11 %	9 %	16 %	8 %	23 %
Sports/active holiday	15 %	21 %	10 %	10 %	14 %	11 %	8 %	19 %	12 %	38 %
Ski holiday	11 %	18 %	3 %	10 %	12 %	17 %	5 %	5 %	9 %	31 %
Countryside holiday	8 %	8 %	14 %	6 %	12 %	7 %	5 %	8 %	7 %	6 %
Party & fun	8 %	14 %	10 %	8 %	5 %	4 %	6 %	7 %	12 %	12 %
Health travel	6 %	9 %	5 %	3 %	8 %	8 %	3 %	7 %	10 %	7 %
Cruise	6 %	8 %	6 %	6 %	4 %	8 %	3 %	7 %	8 %	4 %
Event holiday (festivals, sports etc.)	5 %	9 %	4 %	3 %	5 %	5 %	4 %	3 %	8 %	7 %
Other type of winter holiday with snow	3 %	5 %	1 %	2 %	3 %	4 %	2 %	4 %	5 %	6 %

# 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 (Exploring 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**. Give **new energy** and basically **help me to enjoy life to the fullest**.

## DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place with **a variety of different restaurant offers** and **good service**.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **fresh playful** and **open-minded**.

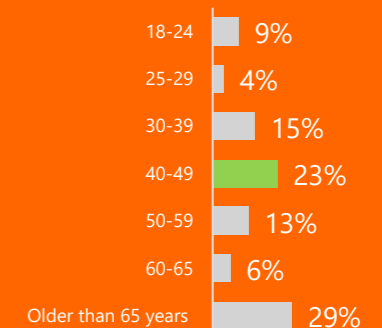
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who **likes to party**. The kind that wants to **have as much fun as possible** in life. More or less people that like to do things **spontaneously, impulsively**. Basically people who have an **active and busy social life**.

**39%**  
ARE BETWEEN  
30-50 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**7%**



# PLAYFUL LIBERATION

## TYPICAL HOLIDAY OCCASIONS

Of course you will find the typical **sun and beach** vacation in this segment, but you will also find **ski holidays**. 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 **approachable, fresh** and **playful**. 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 at booking sites. They would rather stay at home than travel without friends, and will often end up going somewhere if their friends tell them. **Experiencing nightlife** is more important here than in other segments.

## 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. They act on what catches their eye in **social media** or on **booking sites**. It's more like "in the spur of the moment", a typical **"last minute booker"**. **Friends and acquaintances** heavily influences their choice.

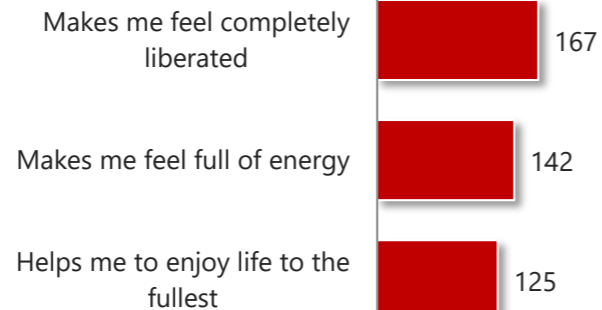


# PLAYFUL LIBERATION - ACTIVE, RELAXED AND FRESH

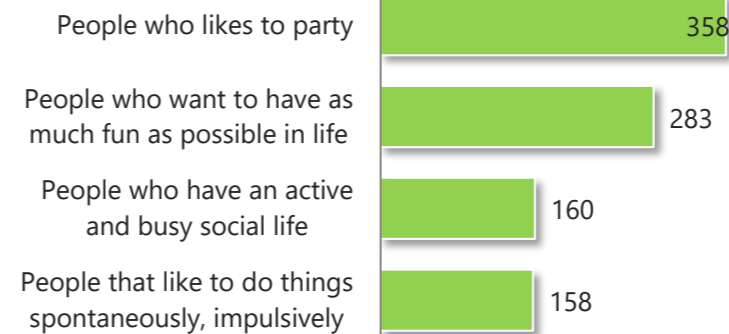
## Core motivations



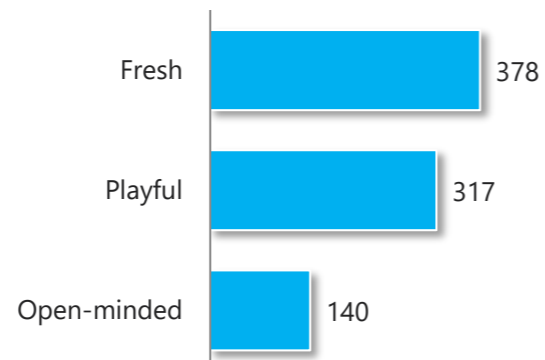
### Emotional Benefits



### Social Identity



### Personality



### Destination features

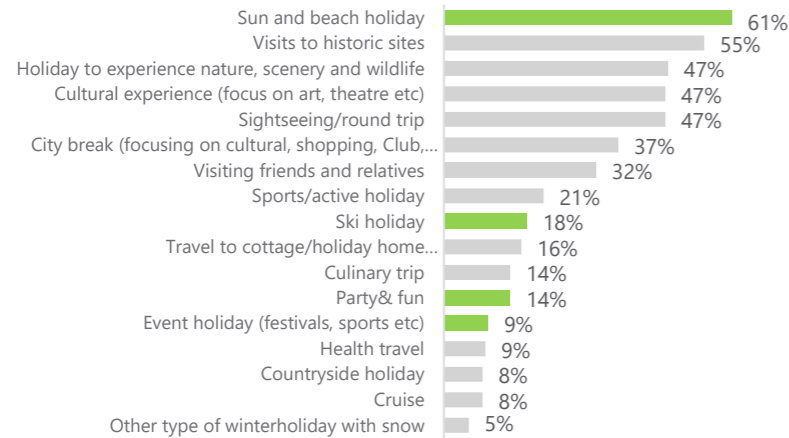


# SEGMENT PROFILE – PLAYFUL LIBERATION

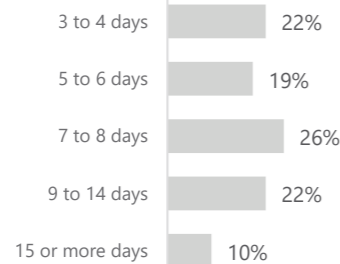
## TPOLOGY



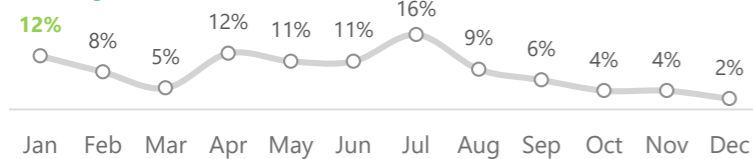
### TYPE OF HOLIDAY



### DURATION



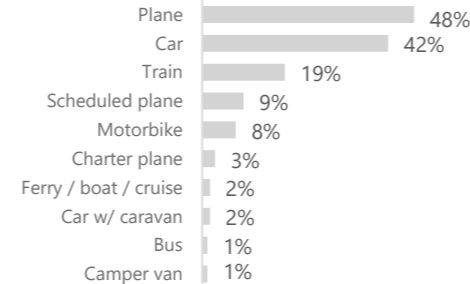
### TIME OF YEAR



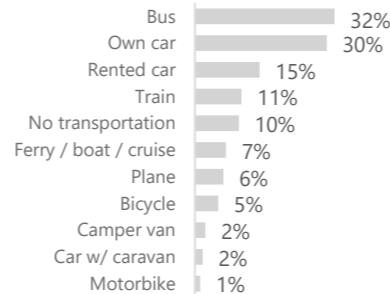
## TRANSPORT AND ACOMMODATION



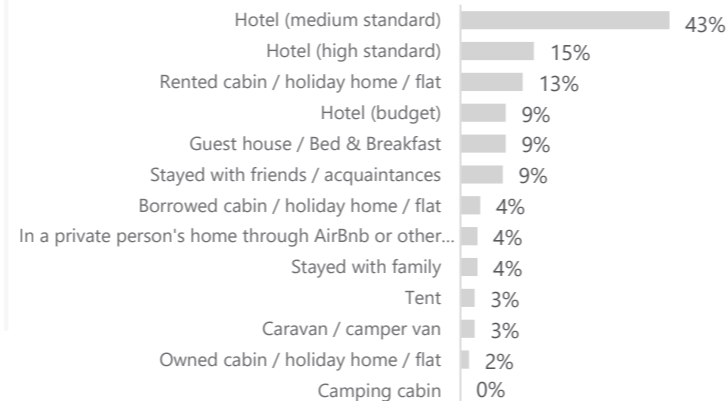
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



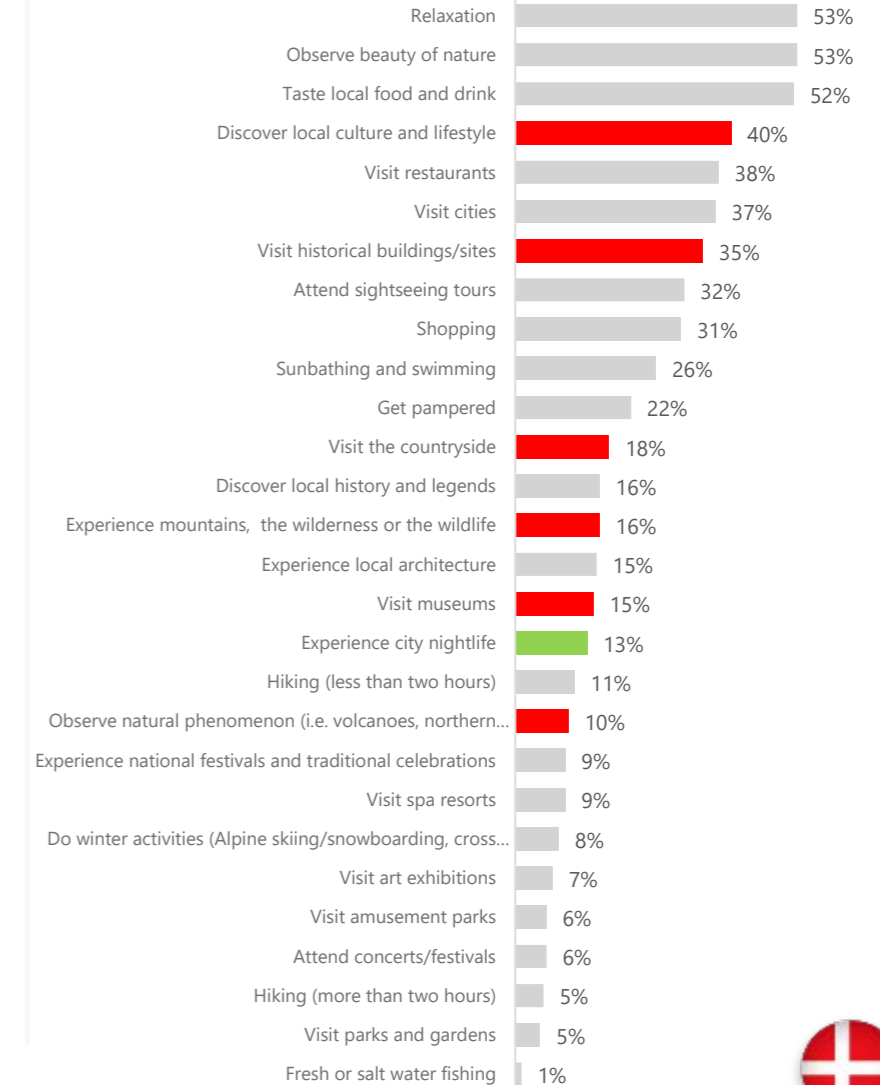
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



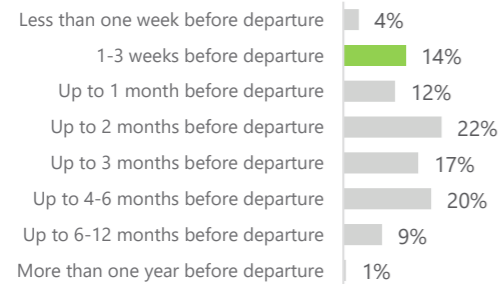
# SEGMENT PROFILE - PLAYFUL LIBERATION

Significantly over indexed in segment  
Significantly under indexed in segment

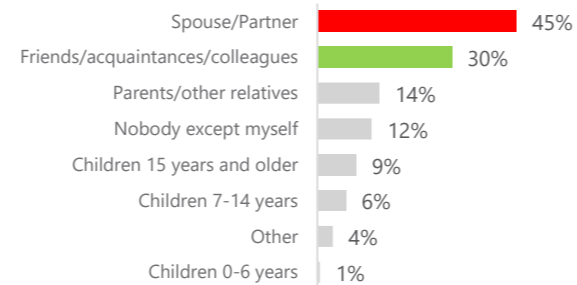
## PLANNING



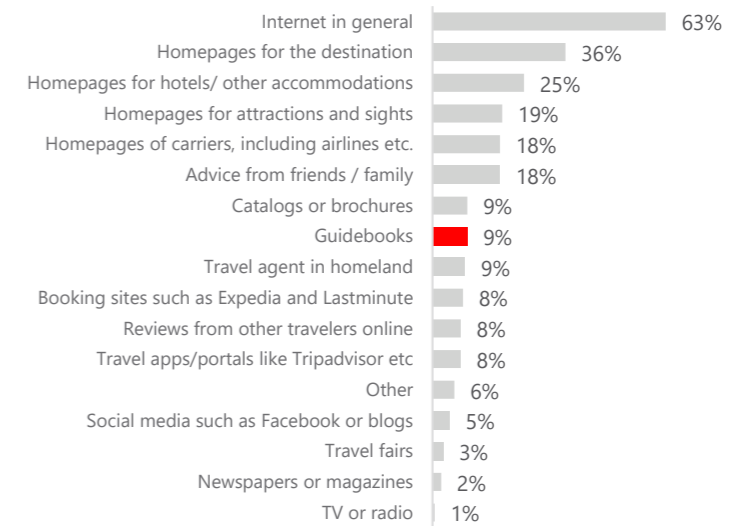
### DECISION MADE



### INFLUENCERS



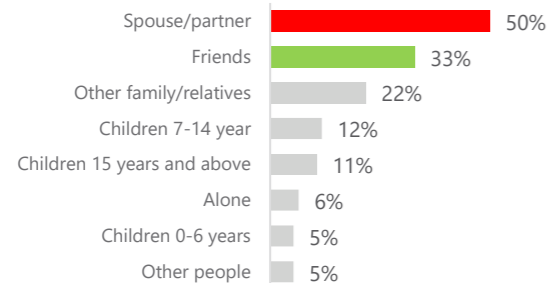
### INFORMATION SOURCES



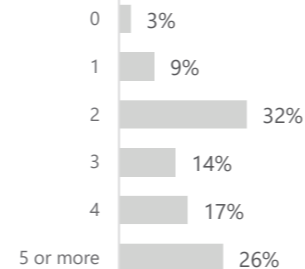
## TRAVEL COMPANIONS



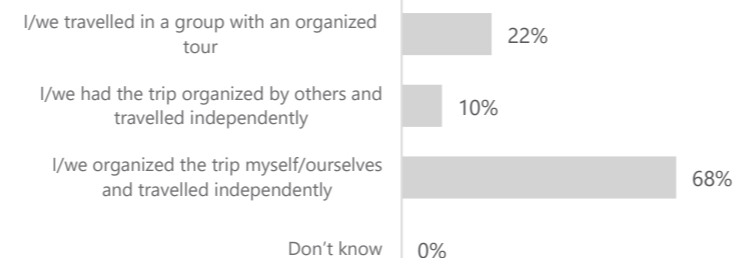
### WHO DID YOU TRAVEL WITH



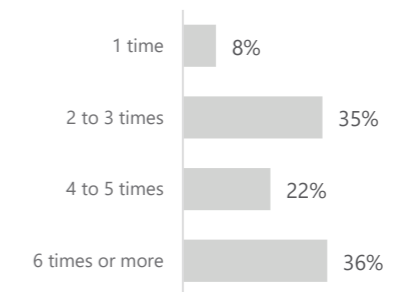
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





## 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 **meet new people**. I want to go a place where I can **immerse myself in the local life** and broaden my horizon. A place that **enriches my view on the world**. I want to **discover new and interesting places**.

## 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 **sights** and a **rich cultural heritage**.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **sociable, outgoing, open-minded, friendly** and **authentic**.

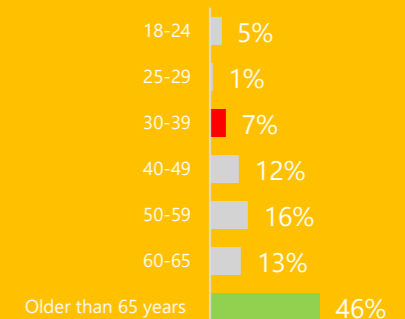
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

**59%**  
ARE ABOVE  
60 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**11%**



# SOCIAL IMMERSION

## TYPICAL HOLIDAY OCCASIONS

In this segment you will find trips to **visit historical sites** and a lot of **sightseeing/round trips**. There are of course some sun & beach holidays here but moreover you will find **culinary trips** as well as trips to **visit friends and family**.

## 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**. Local **history and legends** are also of interest. They want to experience **local architecture** and see visit **historical buildings** and sites. **Museums** is also on the list. The experience of **national festivals and traditional celebrations** are 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 are that organize their trip themselves and **travels independently**. They often travel 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 months before their departure** (62%). They act on what catches their eye on **home pages of attractions**. Their **spouse/partner** heavily influences their choice.



# SOCIAL IMMERSION - ACTIVE, RELAXED AND FRESH

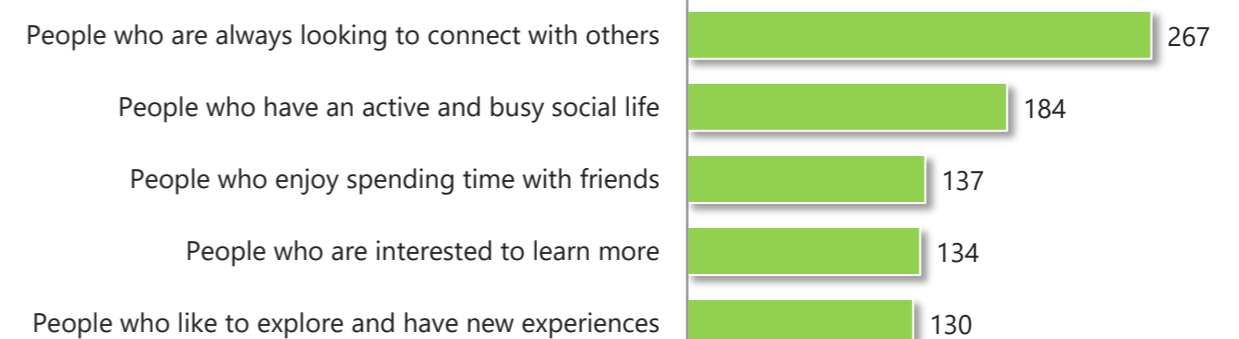
## Core motivations



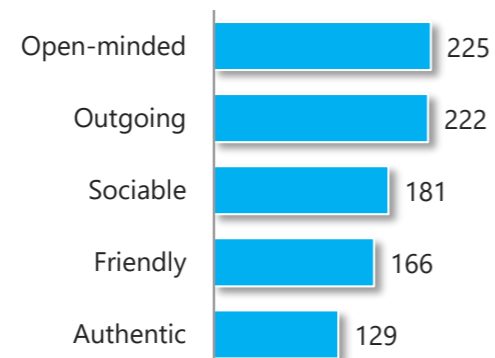
### Emotional Benefits



### Social Identity



### Personality



### Destination features



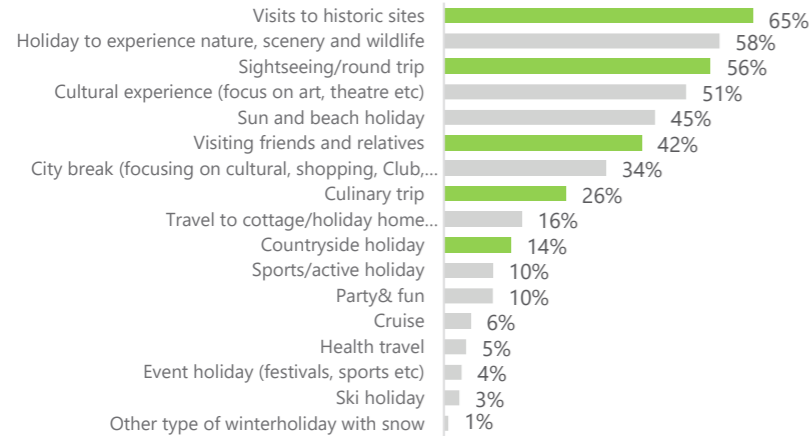
# SEGMENT PROFILE – SOCIAL IMMERSION

Significantly over indexed in segment  
Significantly under indexed in segment

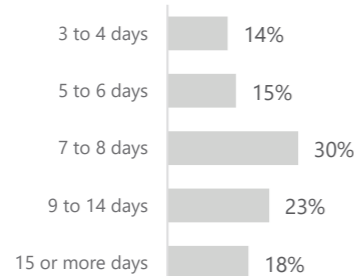
## TYOLOGY



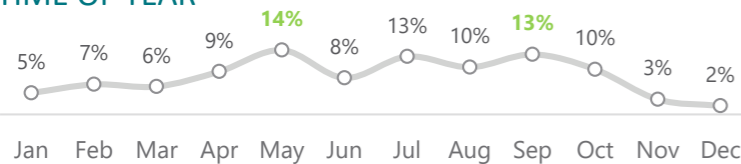
### TYPE OF HOLIDAY



### DURATION



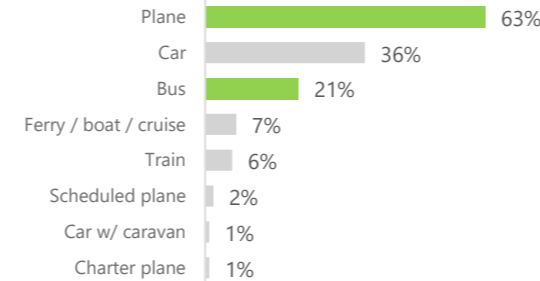
### TIME OF YEAR



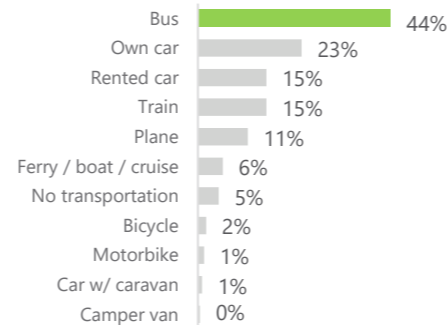
## TRANSPORT AND ACOMMODATION



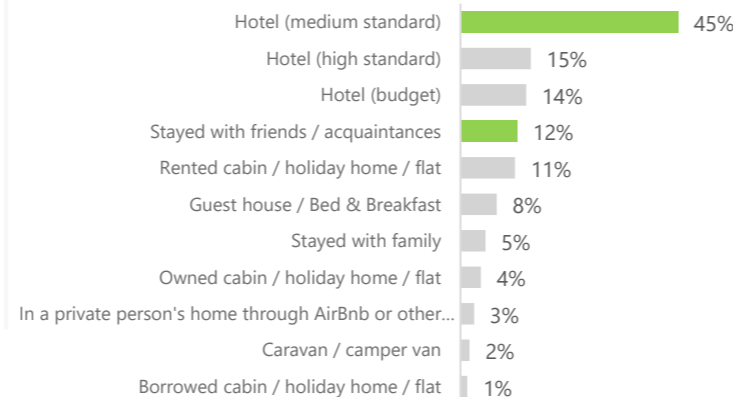
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



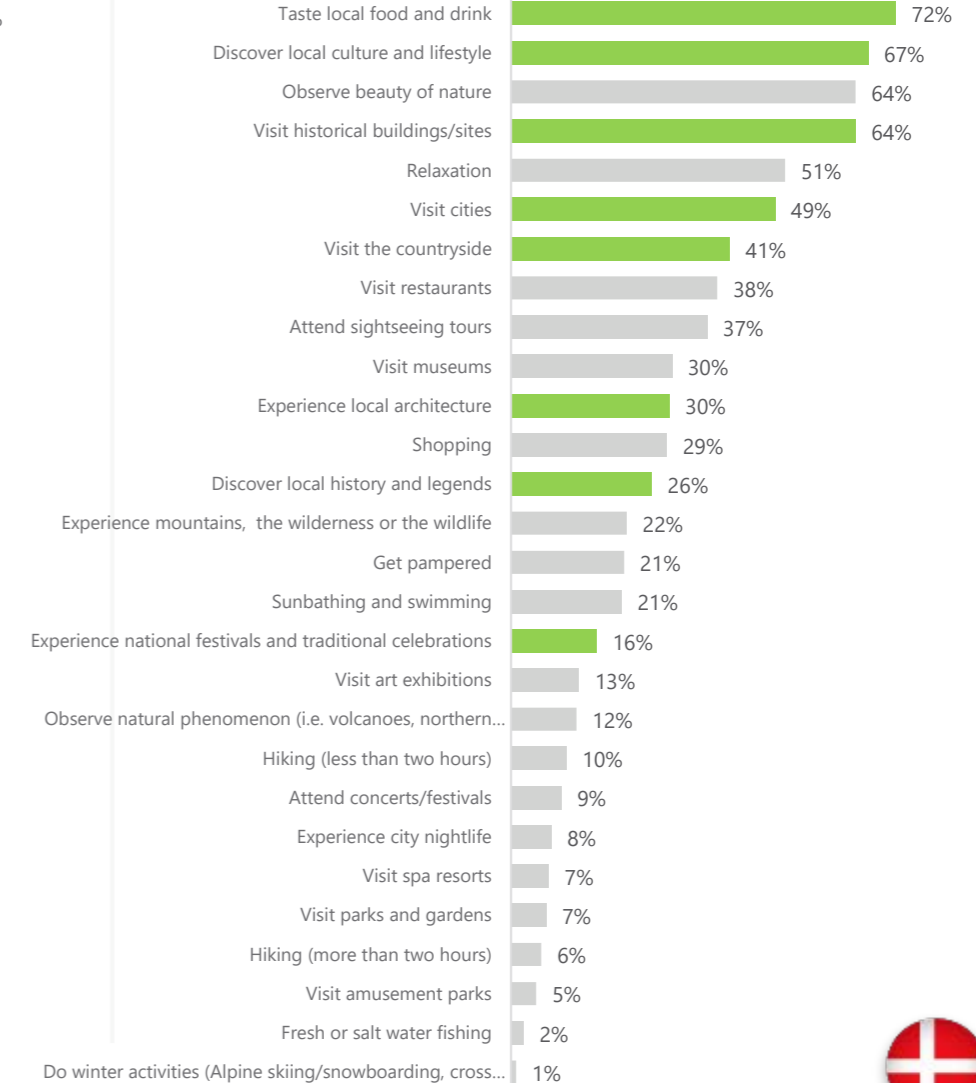
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



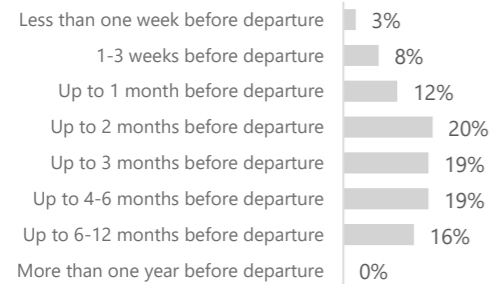
# SEGMENT PROFILE - SOCIAL IMMERSION

Significantly over indexed in segment  
Significantly under indexed in segment

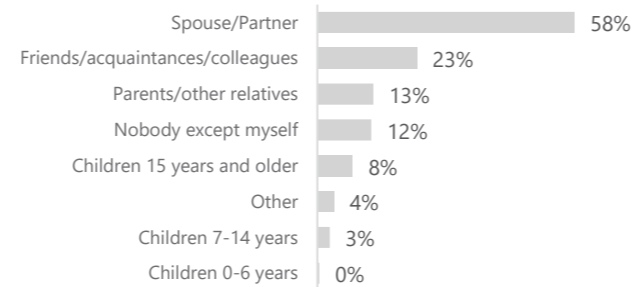
## PLANNING



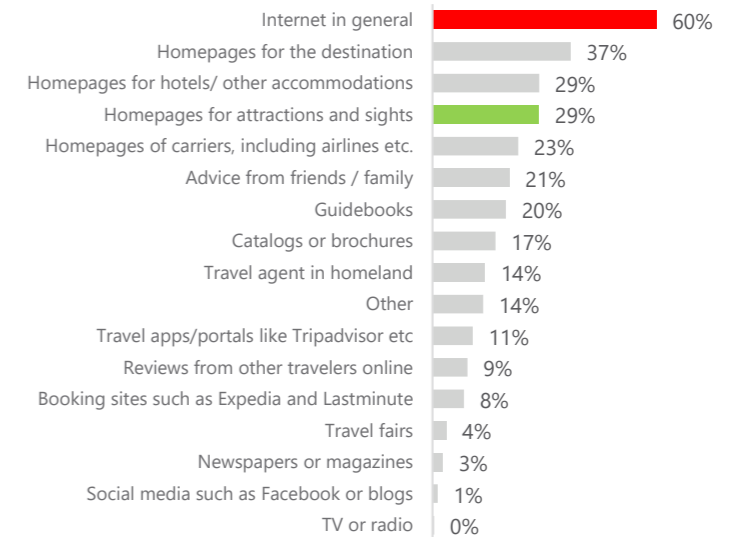
### DECISION MADE



### INFLUENCERS



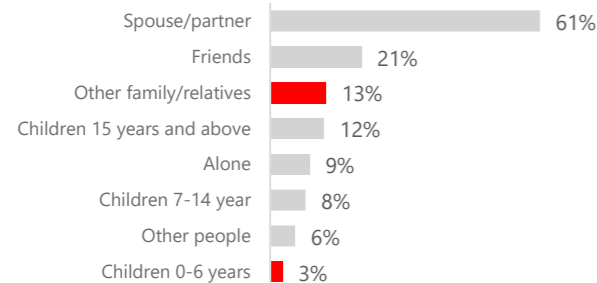
### INFORMATION SOURCES



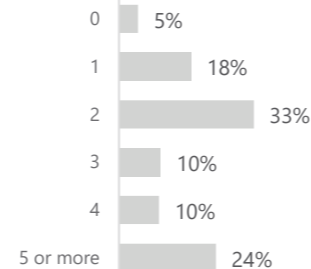
## TRAVEL COMPANIONS



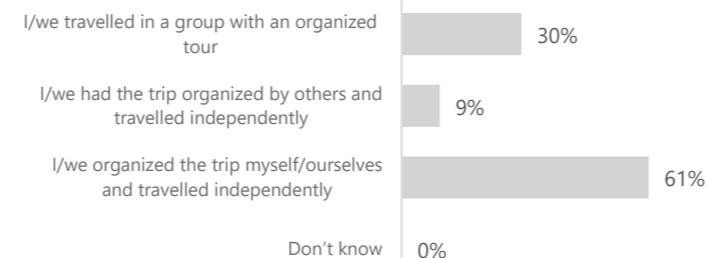
### WHO DID YOU TRAVEL WITH



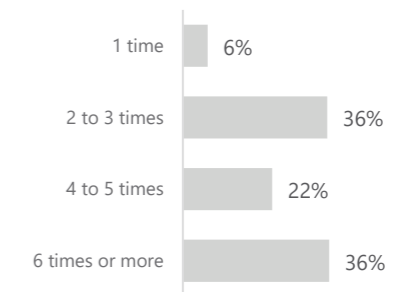
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





## 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 also want to **pamper ourselves**.

## DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

It has to be a destination that is **easy to travel to**. I want **few language barriers** and good **value for money**. My family needs **guaranteed sunshine**. It should have friendly people, good shopping and a variety of different restaurant offers. We like to enjoy good local cuisine. We also like to travel around so it has to be easy to travel around.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

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

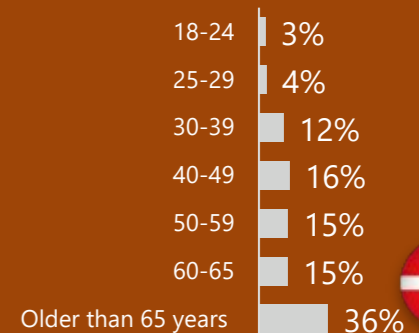
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

**81%**  
ARE ABOVE  
40 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**11%**



# SHARING AND CARING

## TYPICAL HOLIDAY OCCASIONS

This is a typical sun and beach vacation segment. For these consumer it's **all about family**.

## 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 **sunbathing and swimming**, and **getting pampered** is also appreciated by this segment. They like to do some **shopping** as long as the activities are slow, warm and friendly. No pushing boundaries please!

## SOURCES OF INSPIRATIONS

Of course they use the internet, but more than in other segments they act on **advice from friends/family**. **Parents and other relatives** heavily influences their choice. They travel with children and the oldest children are a part of the decision process.

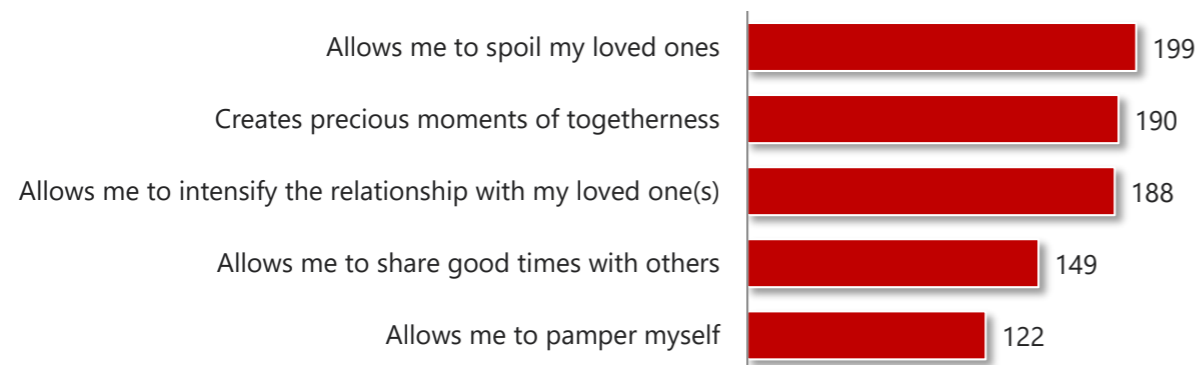


# SHARING AND CARING

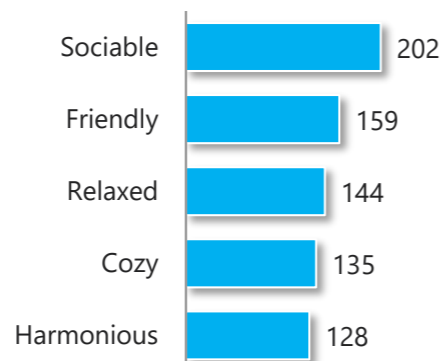
## Core motivations



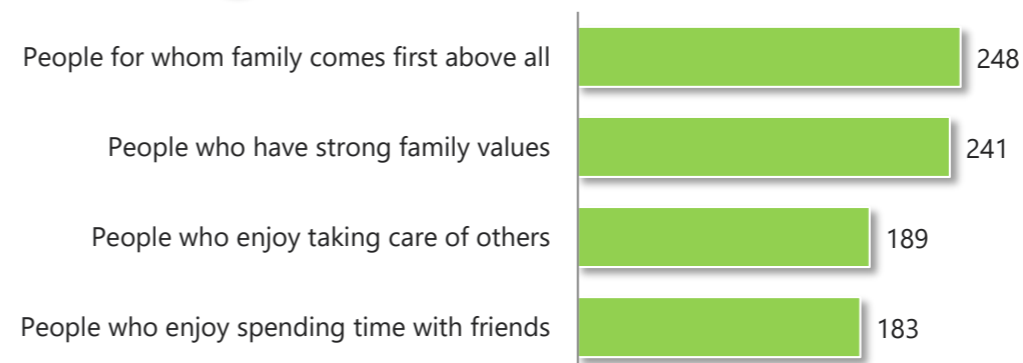
### Emotional Benefits



### Personality



### Social Identity



### Destination features



**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



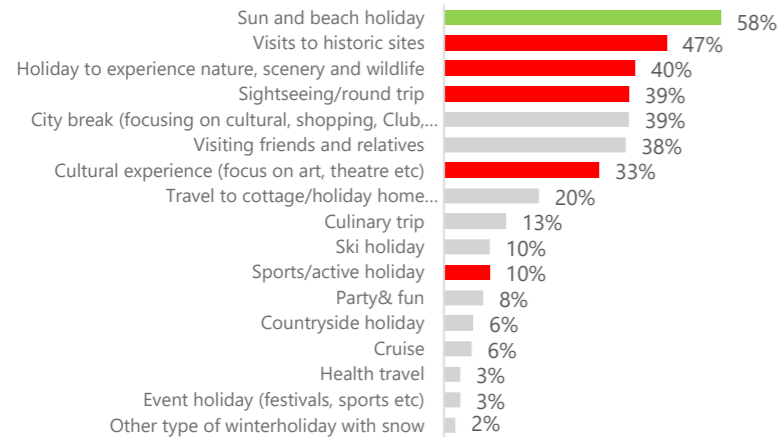
# SEGMENT PROFILE – SHARING AND CARING

Significantly over indexed in segment  
Significantly under indexed in segment

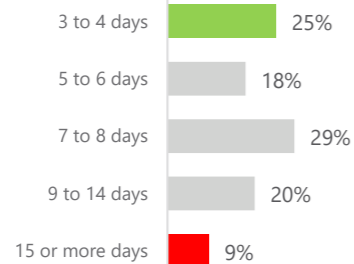
## TYOLOGY



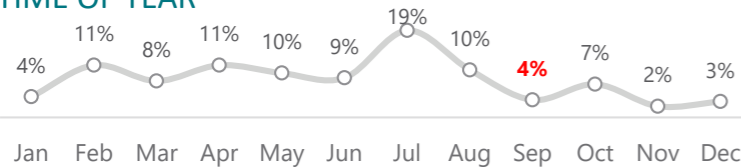
### TYPE OF HOLIDAY



### DURATION



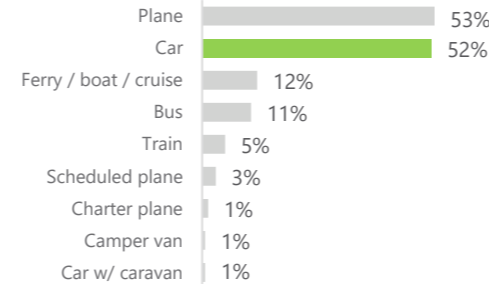
### TIME OF YEAR



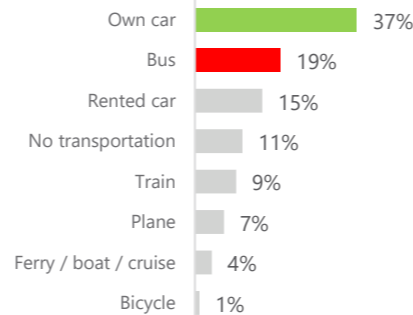
## TRANSPORT AND ACOMMODATION



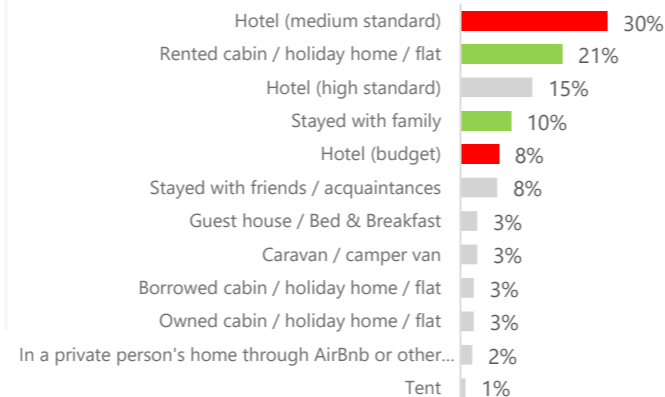
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



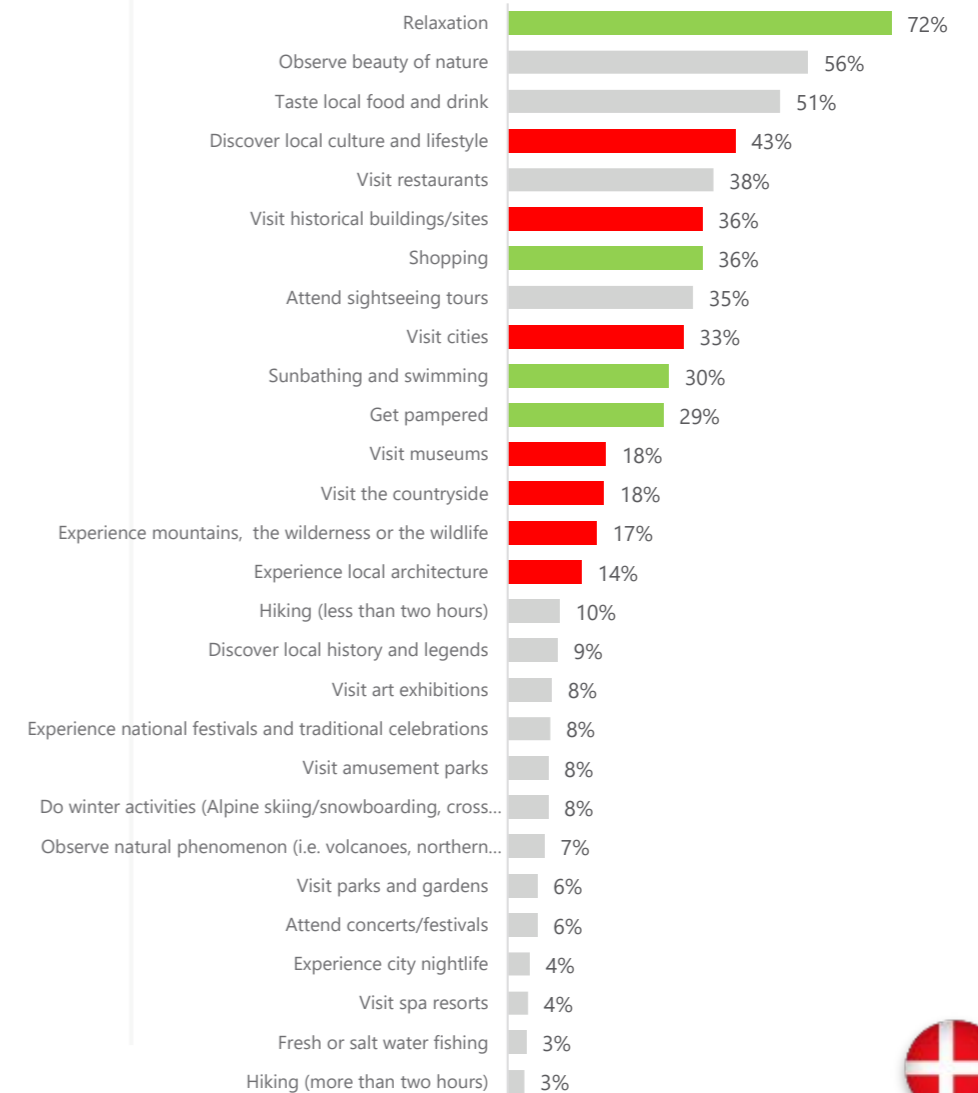
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



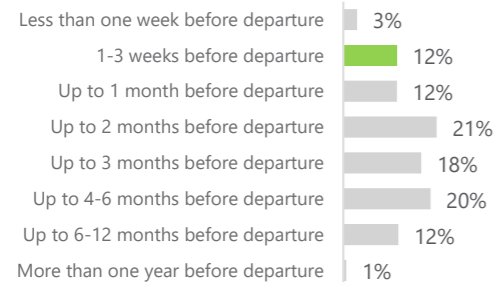
# SEGMENT PROFILE - SHARING AND CARING

Significantly over indexed in segment  
Significantly under indexed in segment

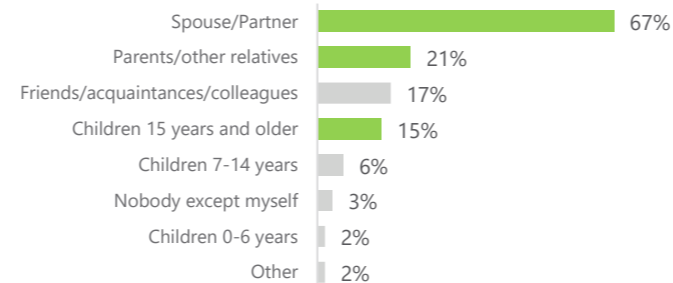
## PLANNING



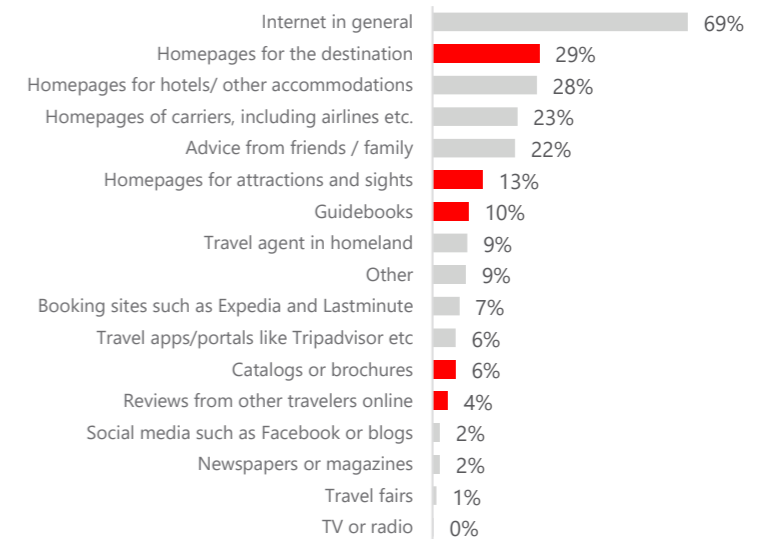
### DECISION MADE



### INFLUENCERS



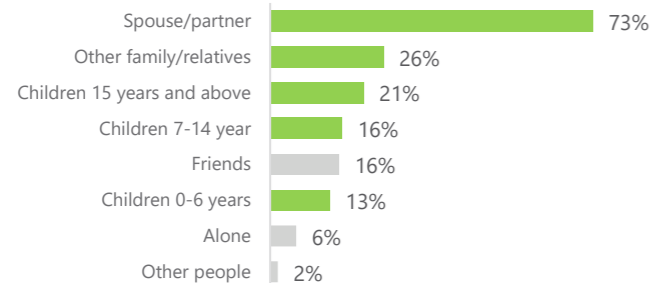
### INFORMATION SOURCES



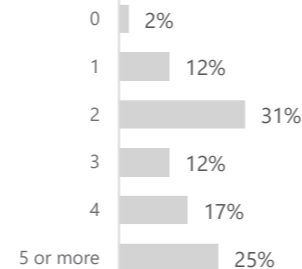
## TRAVEL COMPANIONS



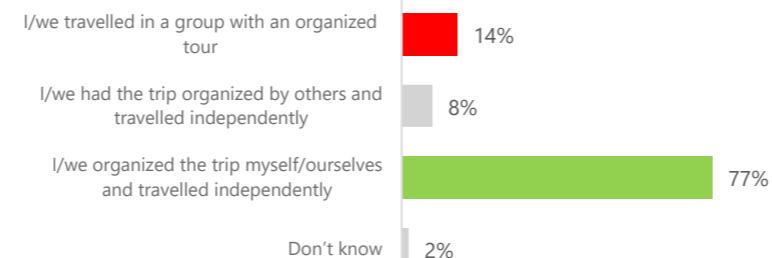
### WHO DID YOU TRAVEL WITH



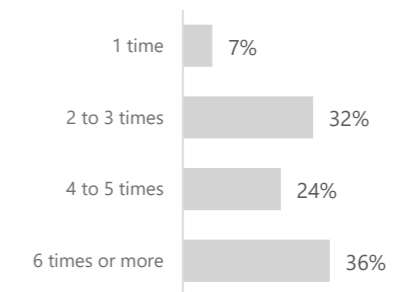
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





# 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 feel completely liberated, enjoy life to the fullest and recharge.

## 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 not be ruined by tourism. I need good beaches and guaranteed sunshine. I would also like beautiful **unspoiled nature**.

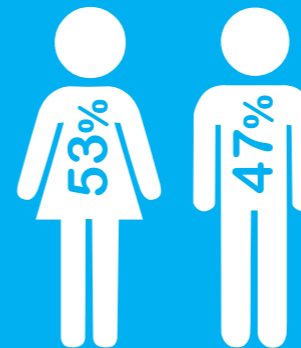
## PERSONALITY; WHAT SHOULD IT STAND FOR?

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

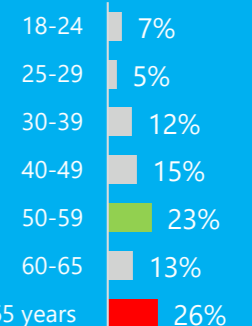
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

**38%**  
ARE BETWEEN  
40-59 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**17%**



# ESCAPE

## TYPICAL HOLIDAY OCCASIONS

Of course you will find the typical **sun and beach vacation** in this segment, but you will find more **travels to cottage/holiday home** and **countryside holidays** than in other segments.

## I TRAVEL TO A QUIET PLACE

These consumers choose destinations that makes them **restore their sense of harmony**. They travel by **car** to a greater extent than other segments and they are also more prone to stay at a **cabin, holiday home** or **flat** than in other segments. They normally stay for 7-14 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

**Relaxation** is on top of the list more than in other segments. The same goes for **observing the beauty of nature**. Activities like **sunbathing** and **swimming**, and **getting pampered** is also appreciated by this segment. They like to do **hiking**. As long as the activities are in quiet environments **close to nature** we are in line with segment needs. They also over index on **saltwater fishing**.

## SOURCES OF INSPIRATIONS

Many of these consumers decide on the trip quite close to departure. 48% of them settle for the trip **two months or less before** they go. They are not over indexing on any information source, and the internet in general is the largest point of inspiration.

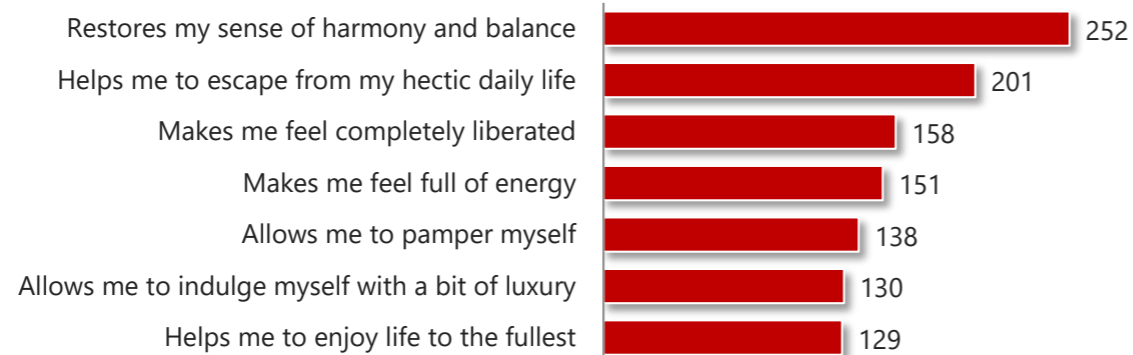


# ESCAPE

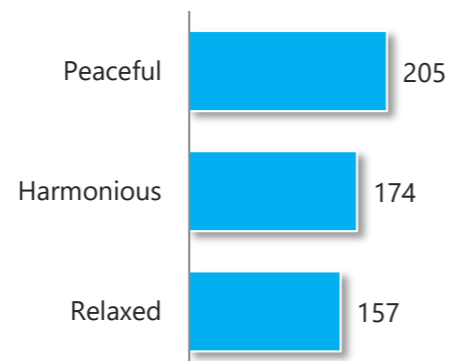
## Core motivations



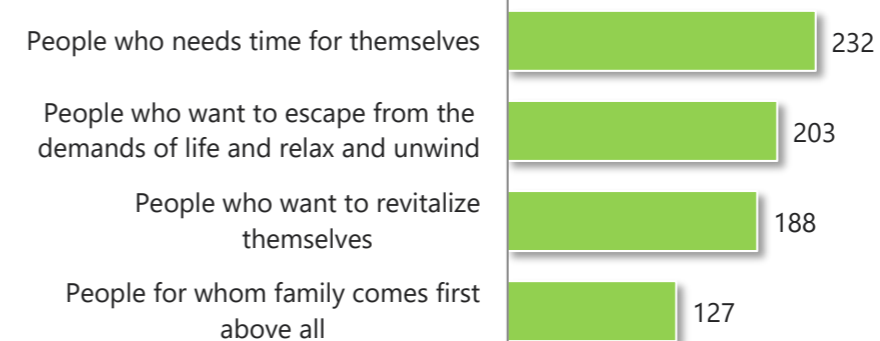
### Emotional Benefits



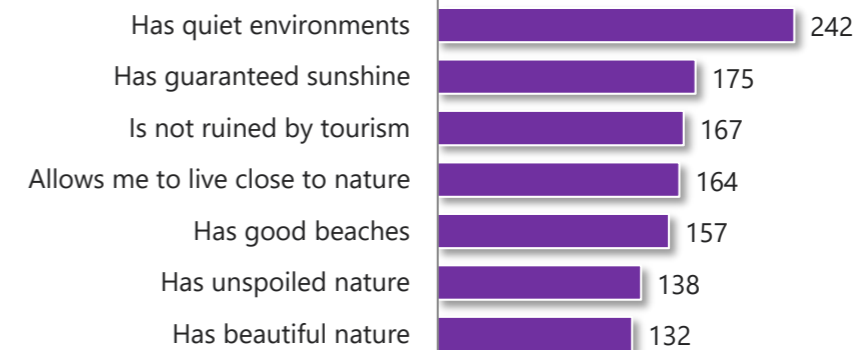
### Personality



### Social Identity



### Destination features



**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



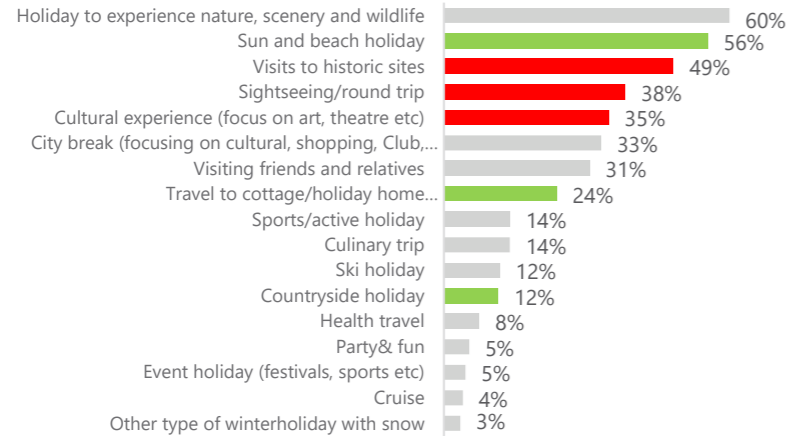
# SEGMENT PROFILE – ESCAPE

Significantly over indexed in segment  
Significantly under indexed in segment

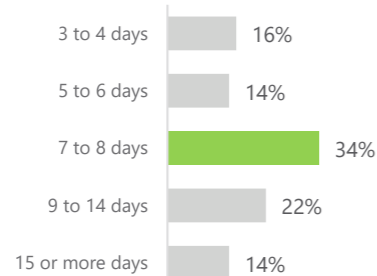
## TPOLOGY



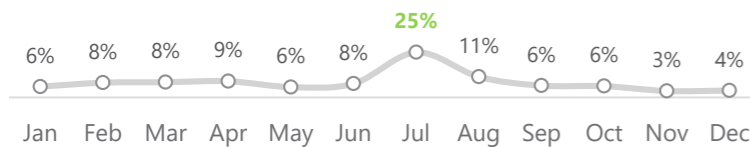
### TYPE OF HOLIDAY



### DURATION



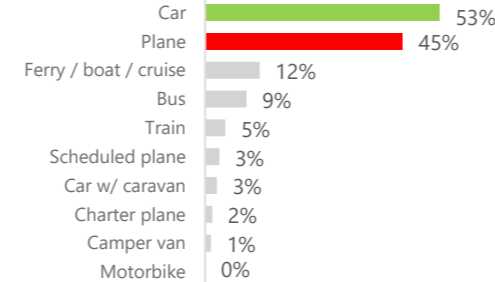
### TIME OF YEAR



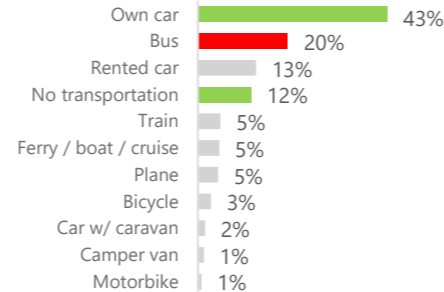
## TRANSPORT AND ACOMMODATION



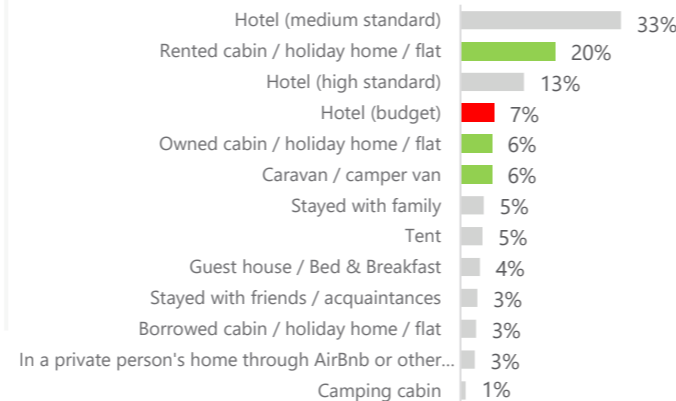
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



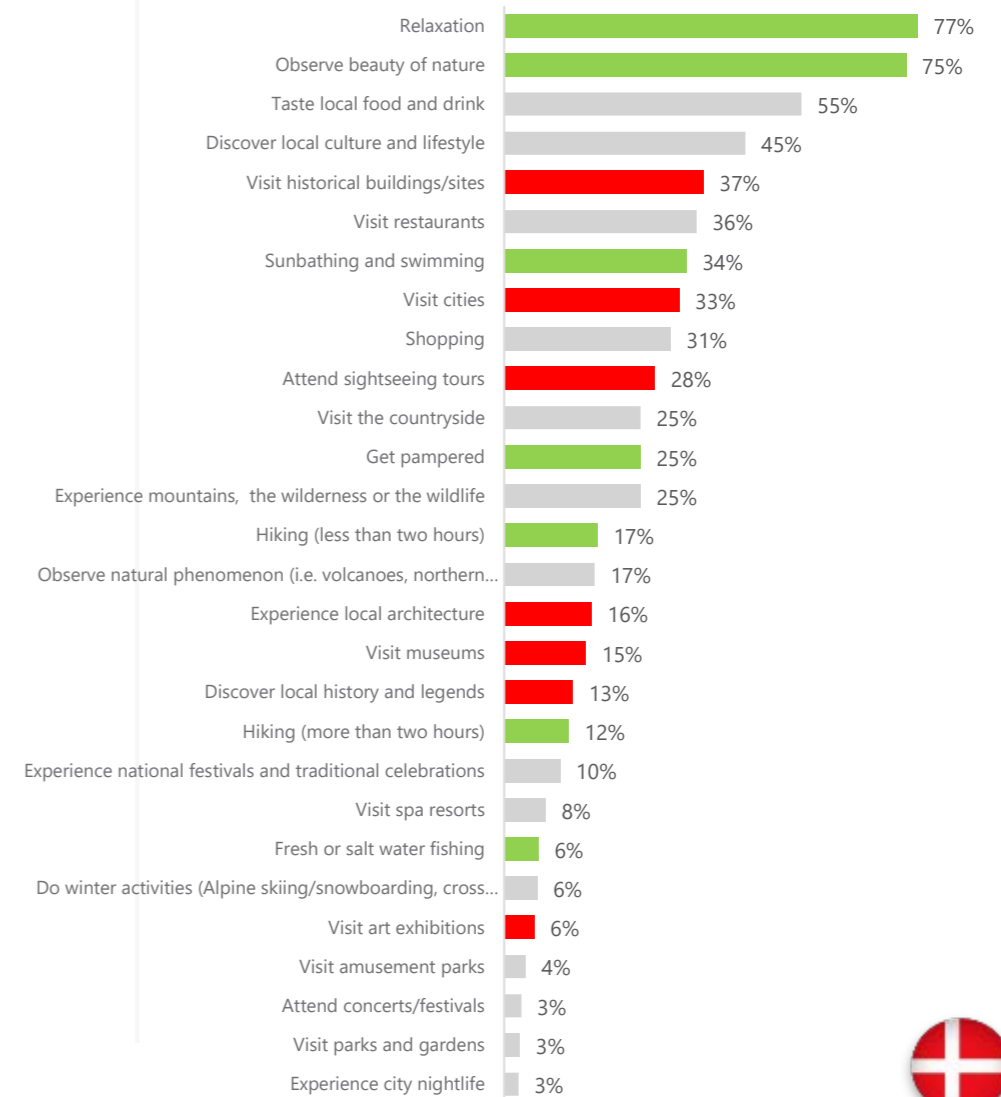
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



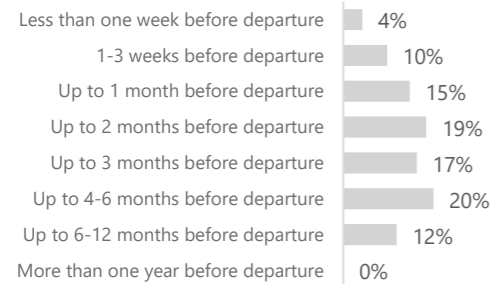
# SEGMENT PROFILE - ESCAPE

Significantly over indexed in segment  
Significantly under indexed in segment

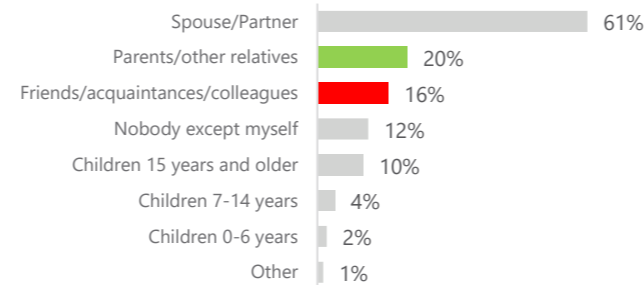
## PLANNING



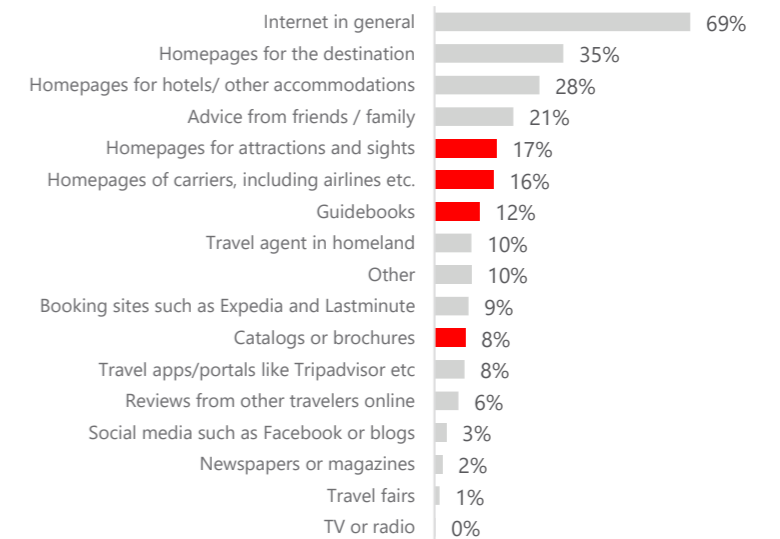
### DECISION MADE



### INFLUENCERS



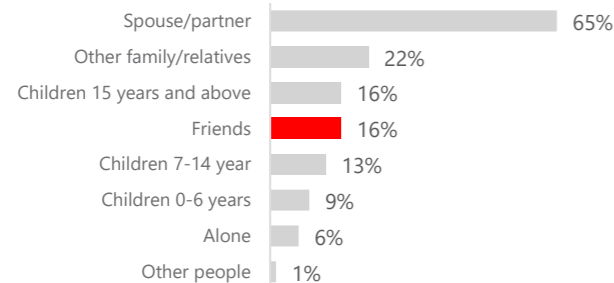
### INFORMATION SOURCES



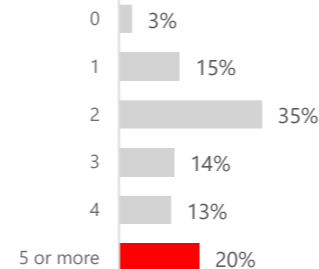
## TRAVEL COMPANIONS



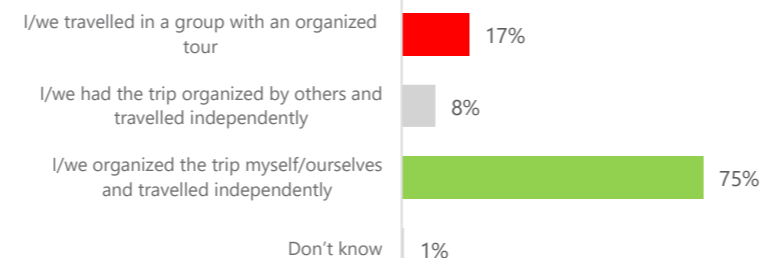
### WHO DID YOU TRAVEL WITH



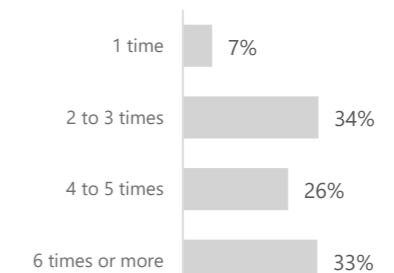
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)



# 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.*

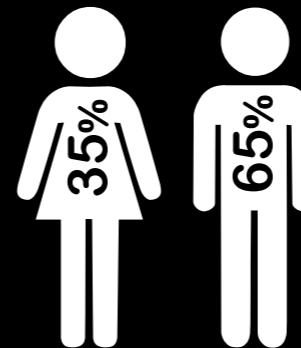
**EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?**  
I want a holiday that gives me a **safe feeling**.

**PERSONALITY; WHAT SHOULD IT STAND FOR?**  
The destination needs to be **practical, predictable and structured**.

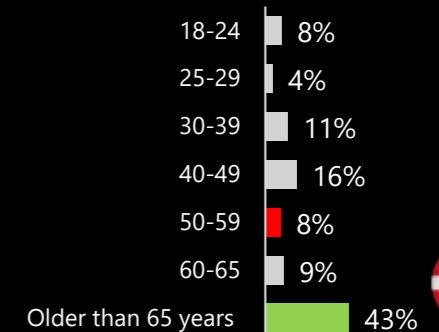
**DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?**  
I want to go to a place that is **well organized** and **not too warm**. Good **service** is important to me. It has to be **easy to travel to**.

**SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?**  
The destination should be for people who make **rational choices**. People who prefer the **familiar** over the unknown. Basically people who **avoid risk**.

**43%**  
ARE OLDER  
THAN  
**65 YEARS**



SHARE OF  
OVERNIGHT  
STAYS  
**8%**



# CONTROL

## TYPICAL HOLIDAY OCCASIONS

Although the typical sun and beach vacation and visits to historic sites dominates in this segment, you will also find **ski holidays** to a greater extent than in other segments.

## I TRAVEL TO AVOID SURPRISES

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

## 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.

## HOLIDAY EXPERIENCE

**Relaxation** is on top of the list. This segment is under indexing on many activities, so a **less active segment**.

## SOURCES OF INSPIRATIONS

These consumers **travel with children** so they are highly influenced by their **spouse**. They do not use that many information sources because the **go to a place they know**.



# CONTROL

## Core motivations



### Emotional Benefits

Gives me a safe feeling

277



### Personality

Predictable

492

Practical

392

Structured

320



### Social Identity

People who avoid risk

399

People who prefer the familiar over the unknown

376

People who make rational choices

330



### Destination features

Is well organized

201

Is not too warm

163

Is easy to travel to

140

Has good service

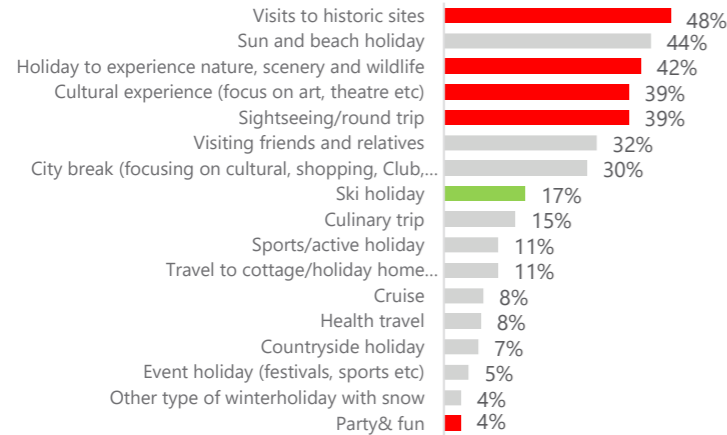
134

# SEGMENT PROFILE – CONTROL

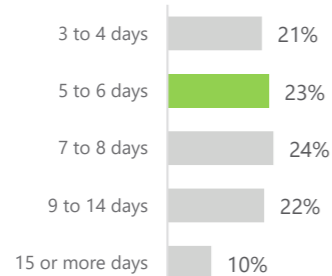
## TYOLOGY



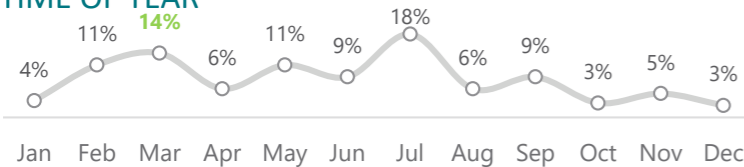
### TYPE OF HOLIDAY



### DURATION



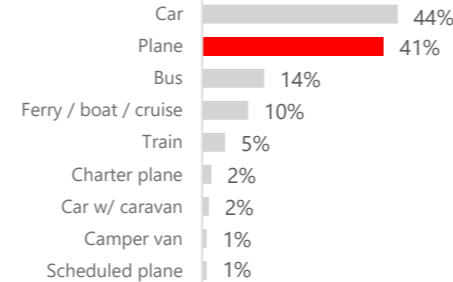
### TIME OF YEAR



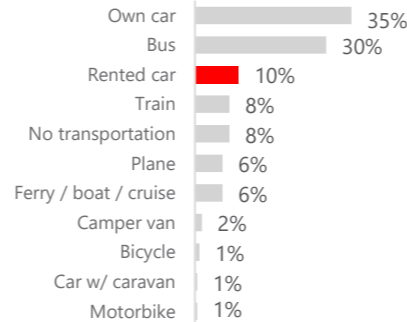
## TRANSPORT AND ACOMMODATION



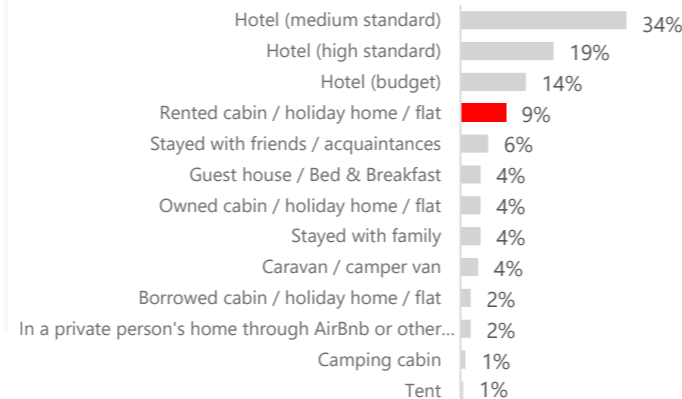
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



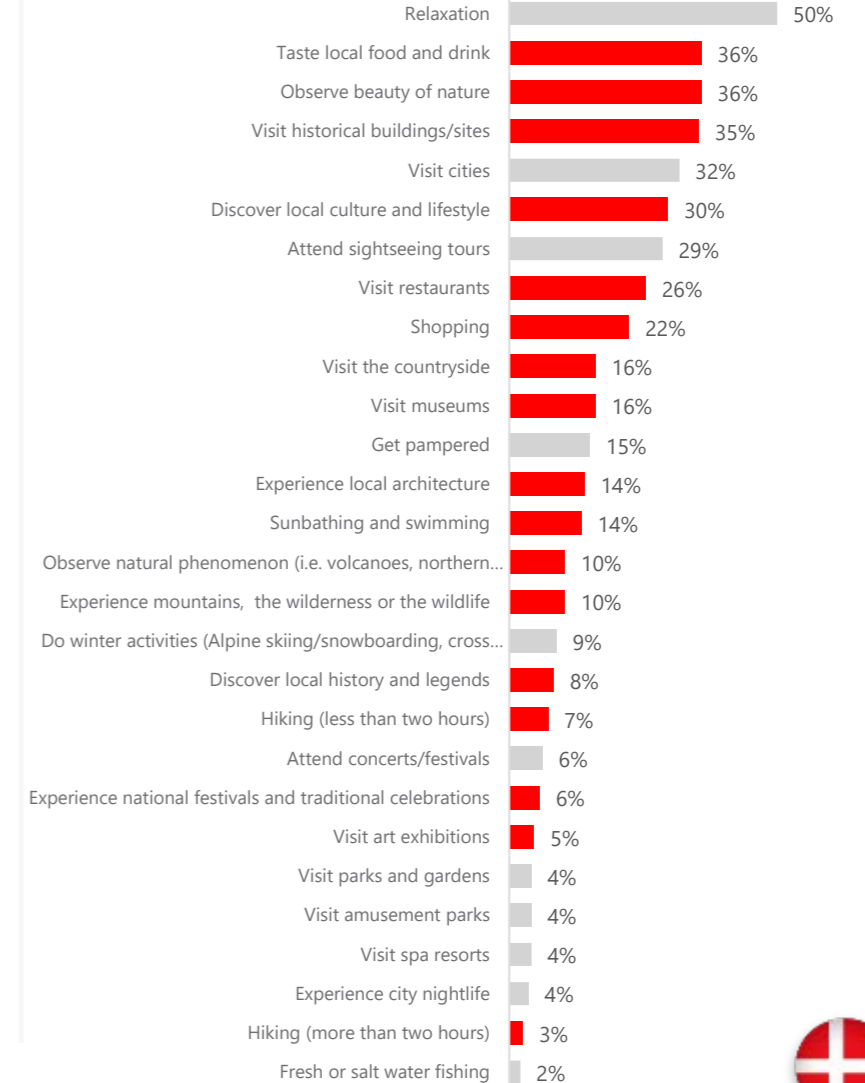
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



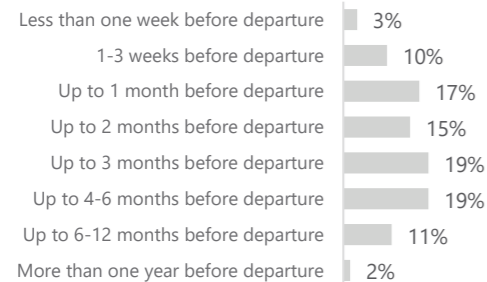
# SEGMENT PROFILE - CONTROL

Significantly over indexed in segment  
Significantly under indexed in segment

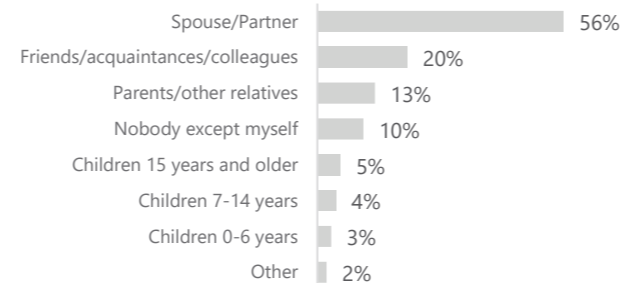
## PLANNING



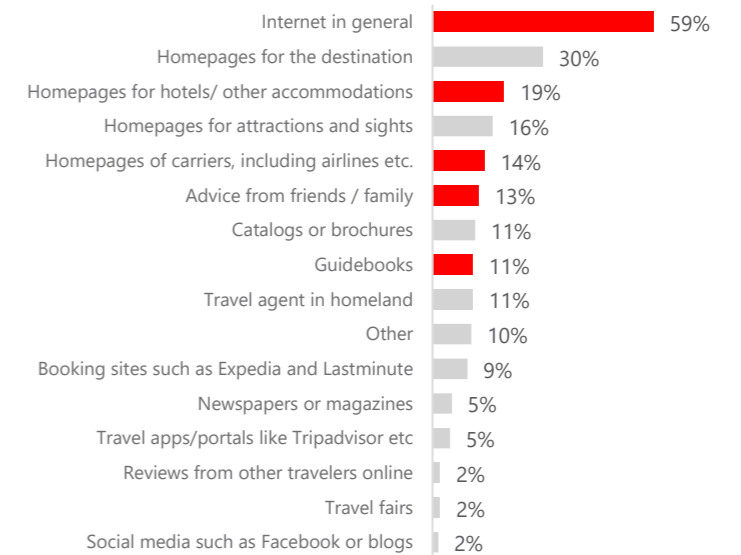
### DECISION MADE



### INFLUENCERS



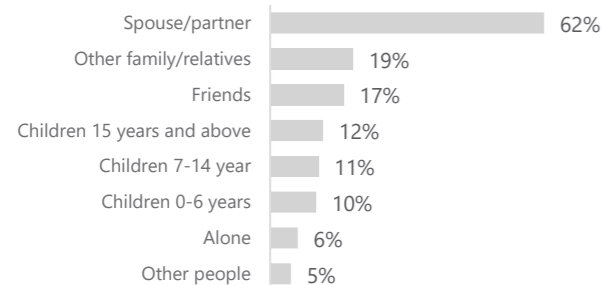
### INFORMATION SOURCES



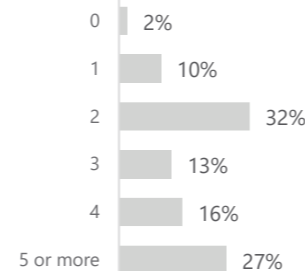
## TRAVEL COMPANIONS



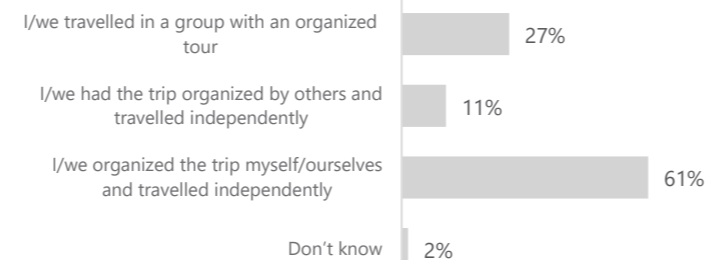
### WHO DID YOU TRAVEL WITH



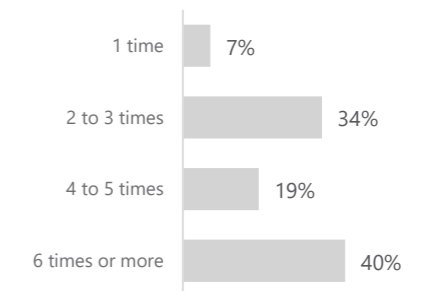
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





## 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 **broaden my knowledge** and my **horizon**. I want to enrich my view on the world and discover **new and interesting places**. All in all I want **rich experiences**.

## 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 have a variety of restaurant offers and good shopping.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

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

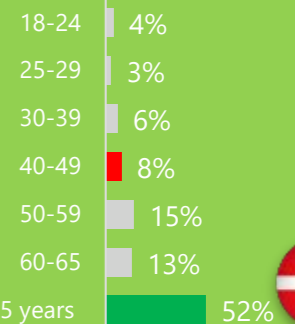
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who are interested to **learn more**. Generally people who like to do things the **unconventional** way, **explore** and have **new experiences**.

**52%**  
ARE ABOVE  
65 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**13%**



# BROADENING MY CULTURAL HORIZON

## TYPICAL HOLIDAY OCCASIONS

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

These consumers you will find at **historical buildings/sites**, they visit **cities**, attend **sightseeing tours** and discover **local culture** and **lifestyle**. They want to visit **museums** and experience local **architecture**. Local **history** and **legends** are of high interest. You will also find them in **gardens/parks**, at **art exhibitions** and **concerts/festivals**.

## SOURCES OF INSPIRATIONS

These consumers are, more than others inspired by **homepages for attractions and sights**, **travel agent in homeland**, **guidebooks** and **catalogues** or **brochures**.

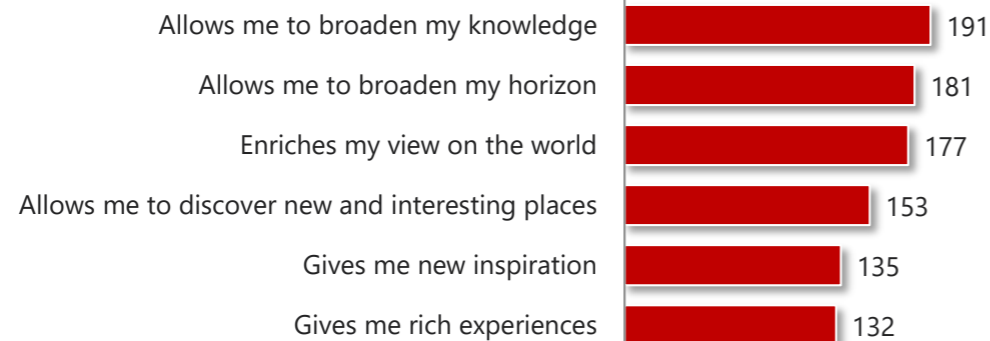


# BROADENING MY CULTURAL HORIZON

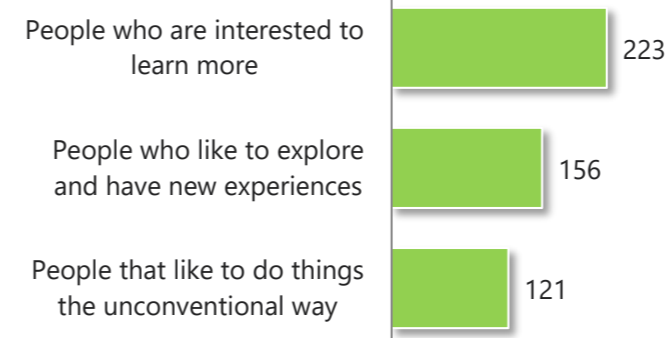
## Core motivations



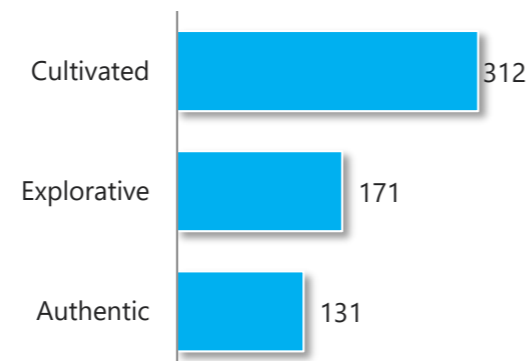
### Emotional Benefits



### Social Identity



### Personality



### Destination features



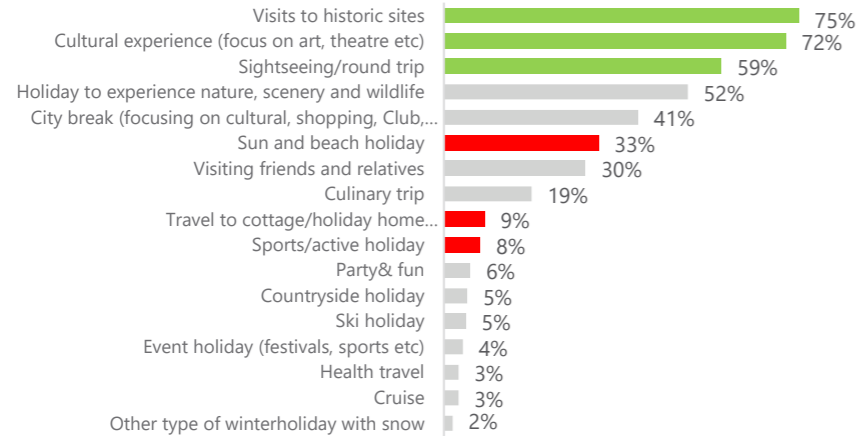
# SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

Significantly over indexed in segment  
Significantly under indexed in segment

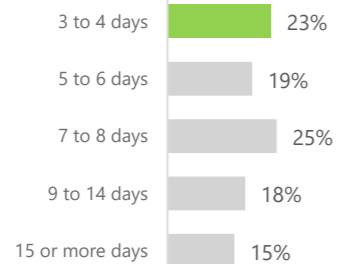
## TYOLOGY



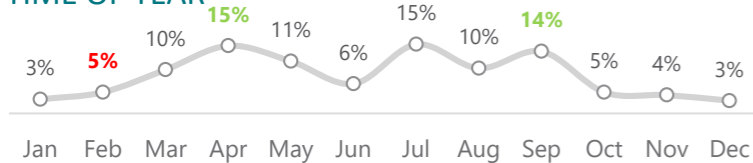
### TYPE OF HOLIDAY



### DURATION



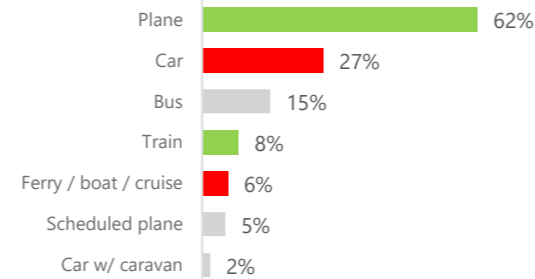
### TIME OF YEAR



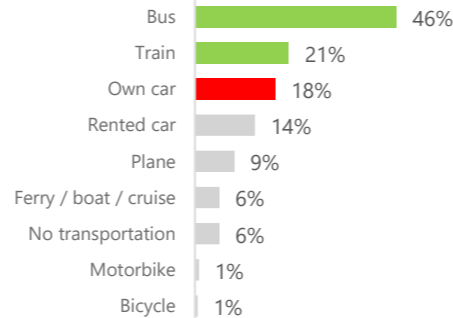
## TRANSPORT AND ACOMMODATION



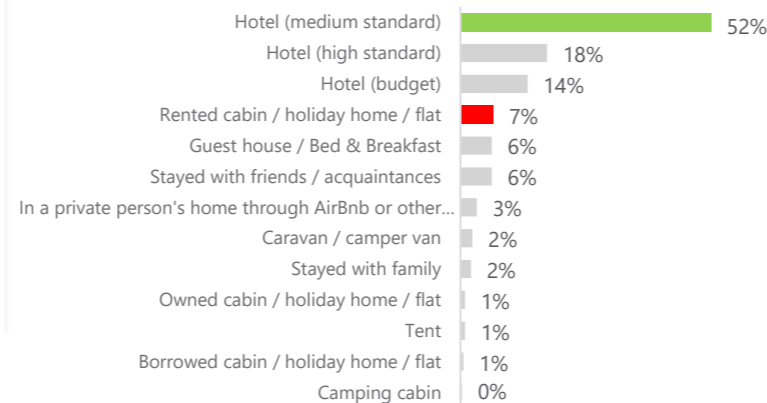
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



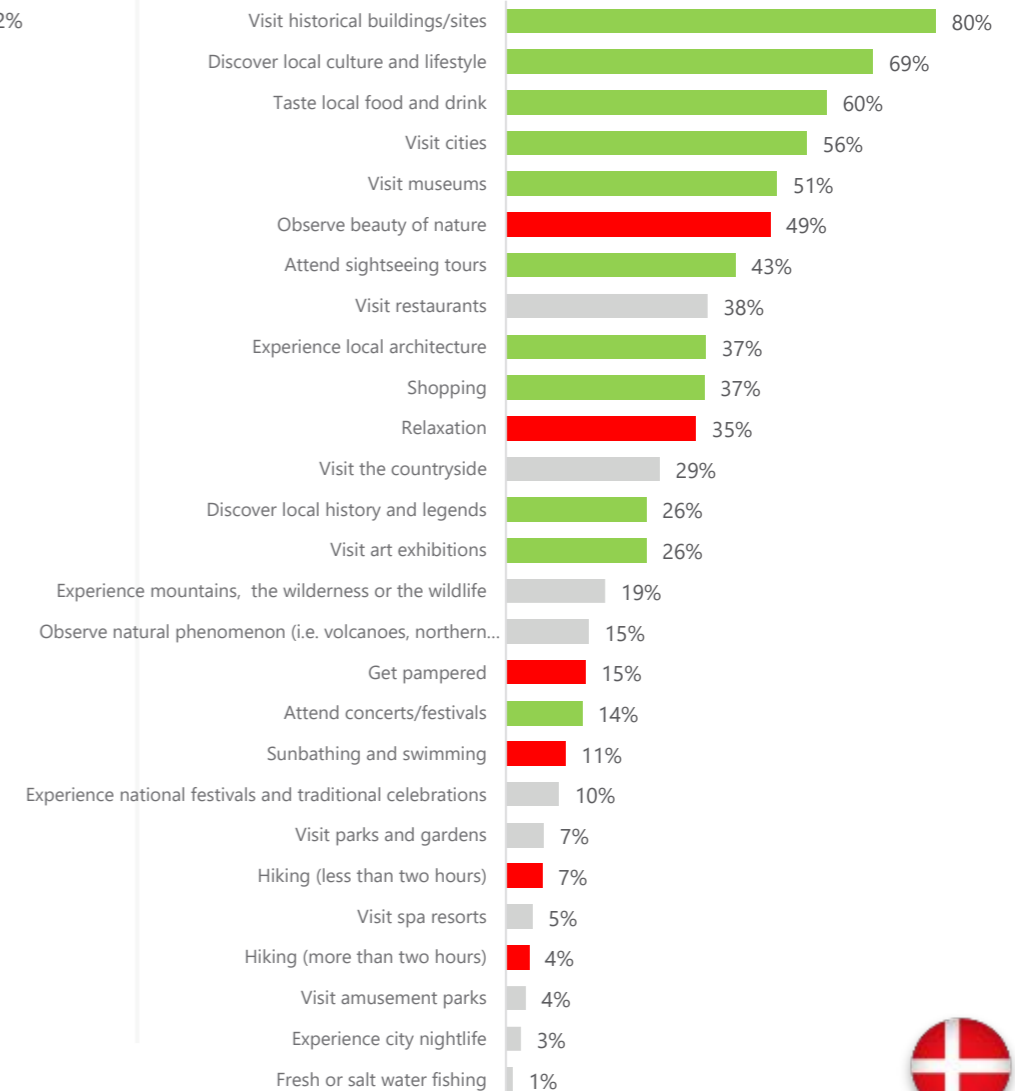
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



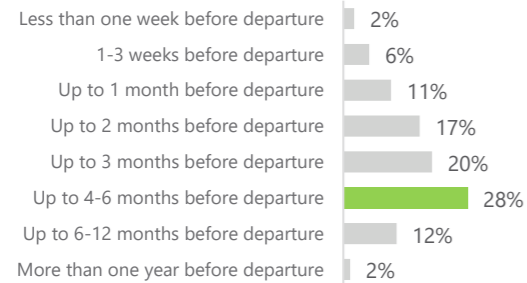
# SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

Significantly over indexed in segment  
Significantly under indexed in segment

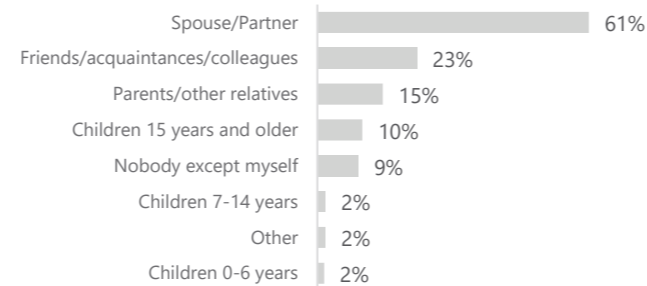
## PLANNING



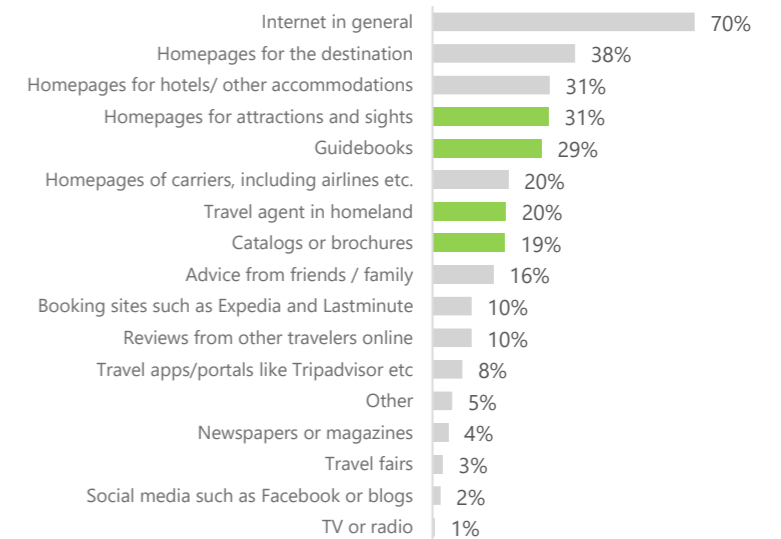
### DECISION MADE



### INFLUENCERS



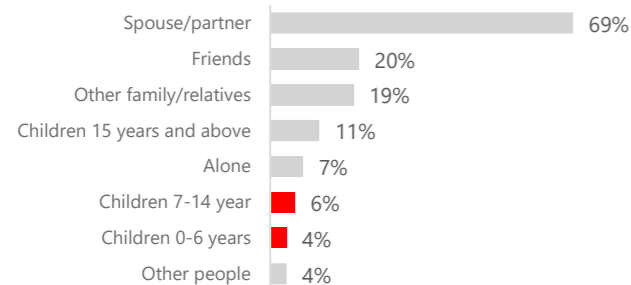
### INFORMATION SOURCES



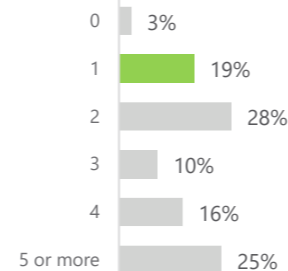
## TRAVEL COMPANIONS



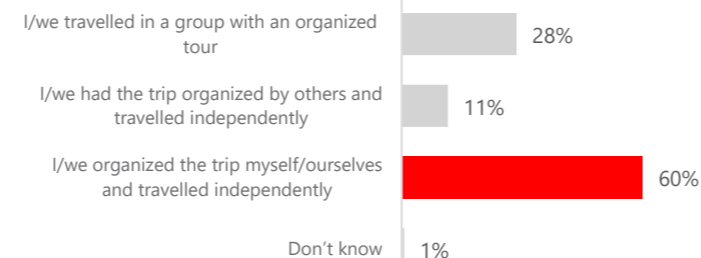
### WHO DID YOU TRAVEL WITH



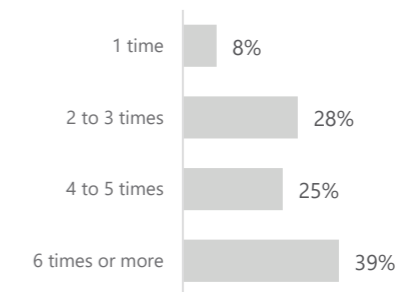
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





## 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 **broaden my knowledge** and my **horizon**. I want to enrich my view on the world and discover **new and interesting places**. All in all I want **rich experiences** and new **inspiration**.

## DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that is **not ruined by tourism**. It has **unspoiled nature** and allow me to **live close to nature**. I want **beautiful nature**. A destination that has good opportunities to **meet local people** and also **interesting sights**. A rich **cultural heritage** would also be good.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **adventurous, unique, explorative, authentic** and **active**.

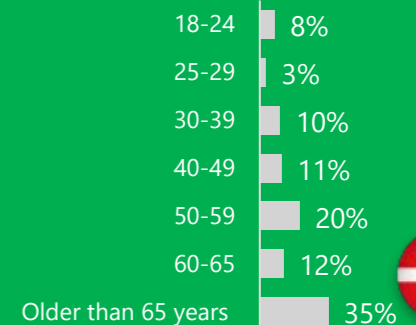
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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 have **new experiences** and are interested to **learn more**.

**42%**  
ARE BETWEEN  
30-59 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**18%**



# ADVENTURES IN THE WORLD OF NATURAL BEAUTY

## TYPICAL HOLIDAY OCCASIONS

The most common holiday type is a holiday to **experience nature, scenery and wildlife**. They are also over indexing on **cultural experience (focus on art, theatre etc), Visits to historic sites and sightseeing/round trip**.

## I TRAVEL TO SOMETHING UNIQUE

These consumers choose destinations that makes them **feel adventurous and knowledgable**. 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

This is a very active segment. They want to observe **beauty of nature** and **natural phenomenon**, discover **local culture** and lifestyle, experience **mountains**, the **wilderness** or the **wildlife**, discover local **history** and **legends**, visit the **countryside** and also experience **national festivals** and traditional celebrations.

## SOURCES OF INSPIRATIONS

This segment seek a lot of information from **homepages** for the destination, carriers and attractions and sights. They also use **guidebooks** and **read reviews** from other travelers online. **Catalogues** or **brochures** are also popular.



# ADVENTURES IN THE WORLD OF NATURAL BEAUTY

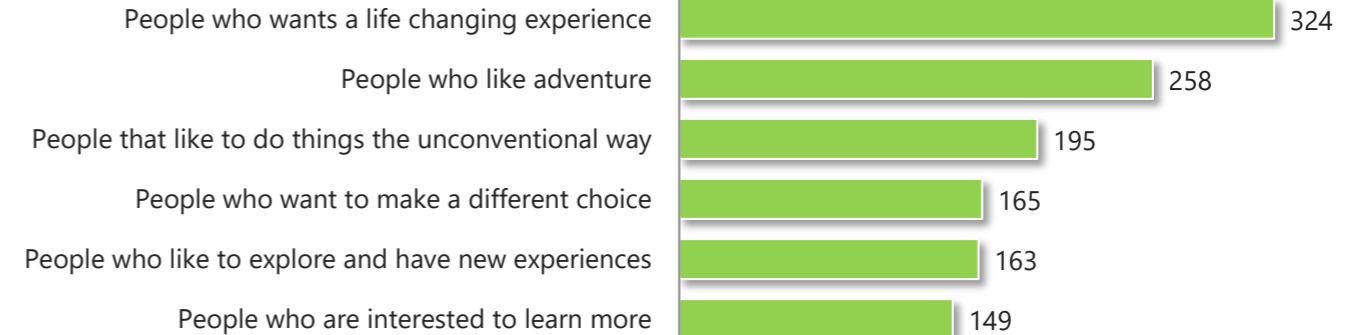
## Core motivations



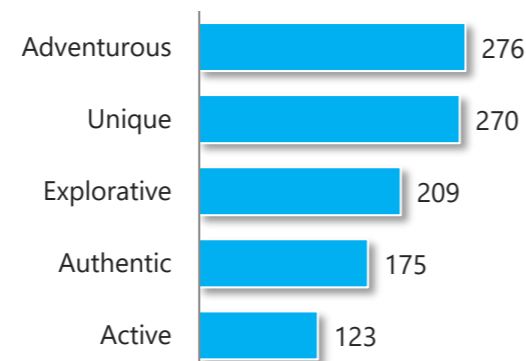
### Emotional Benefits



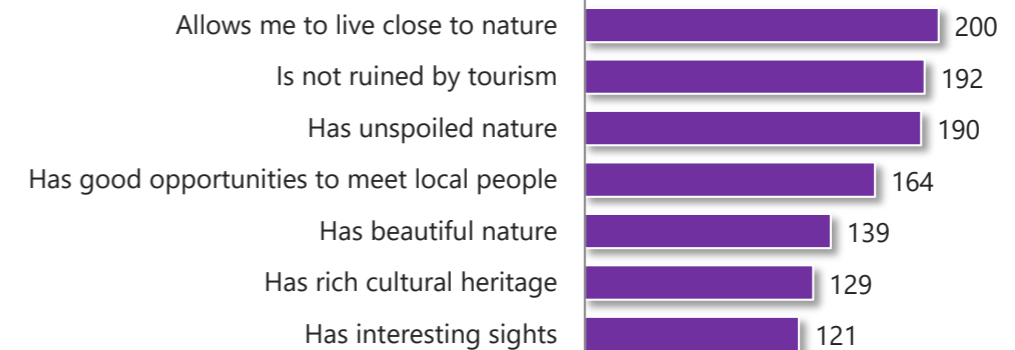
### Social Identity



### Personality



### Destination features



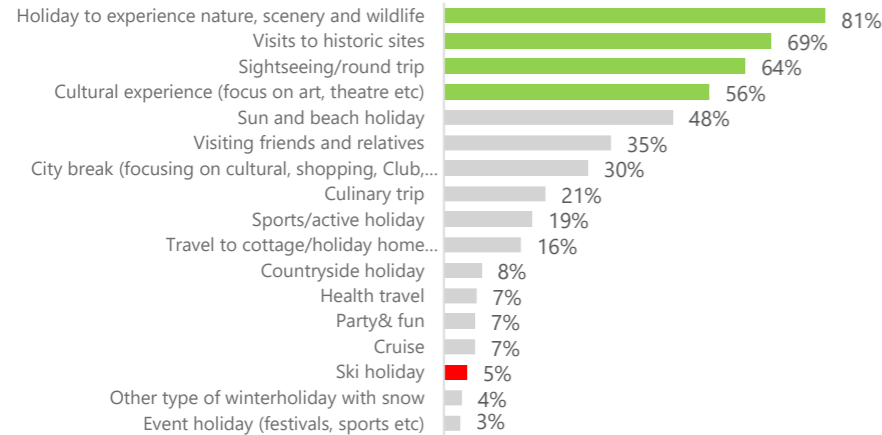
# SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Significantly over indexed in segment  
Significantly under indexed in segment

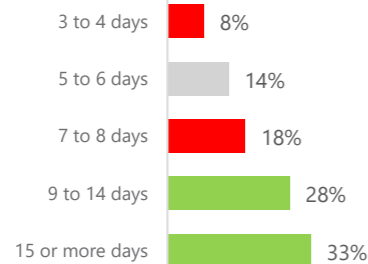
## TYOLOGY



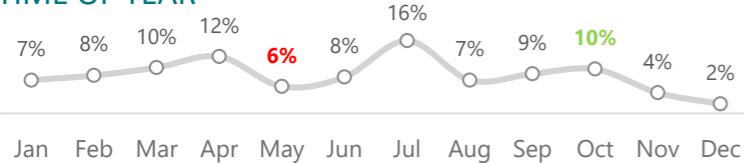
### TYPE OF HOLIDAY



### DURATION



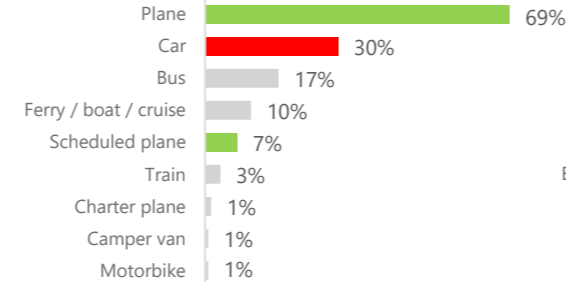
### TIME OF YEAR



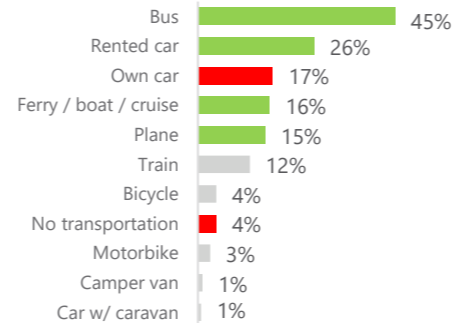
## TRANSPORT AND ACOMMODATION



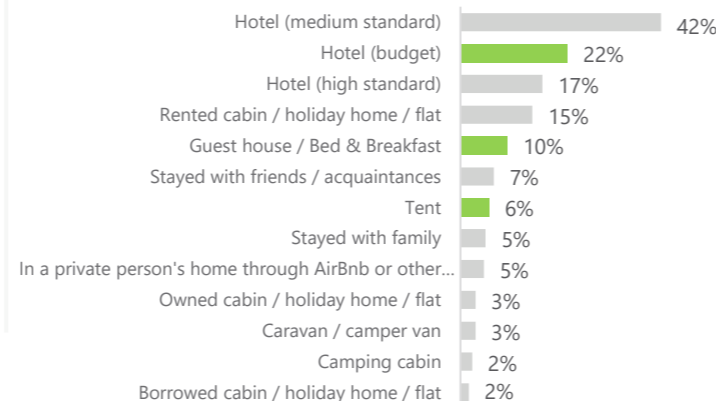
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



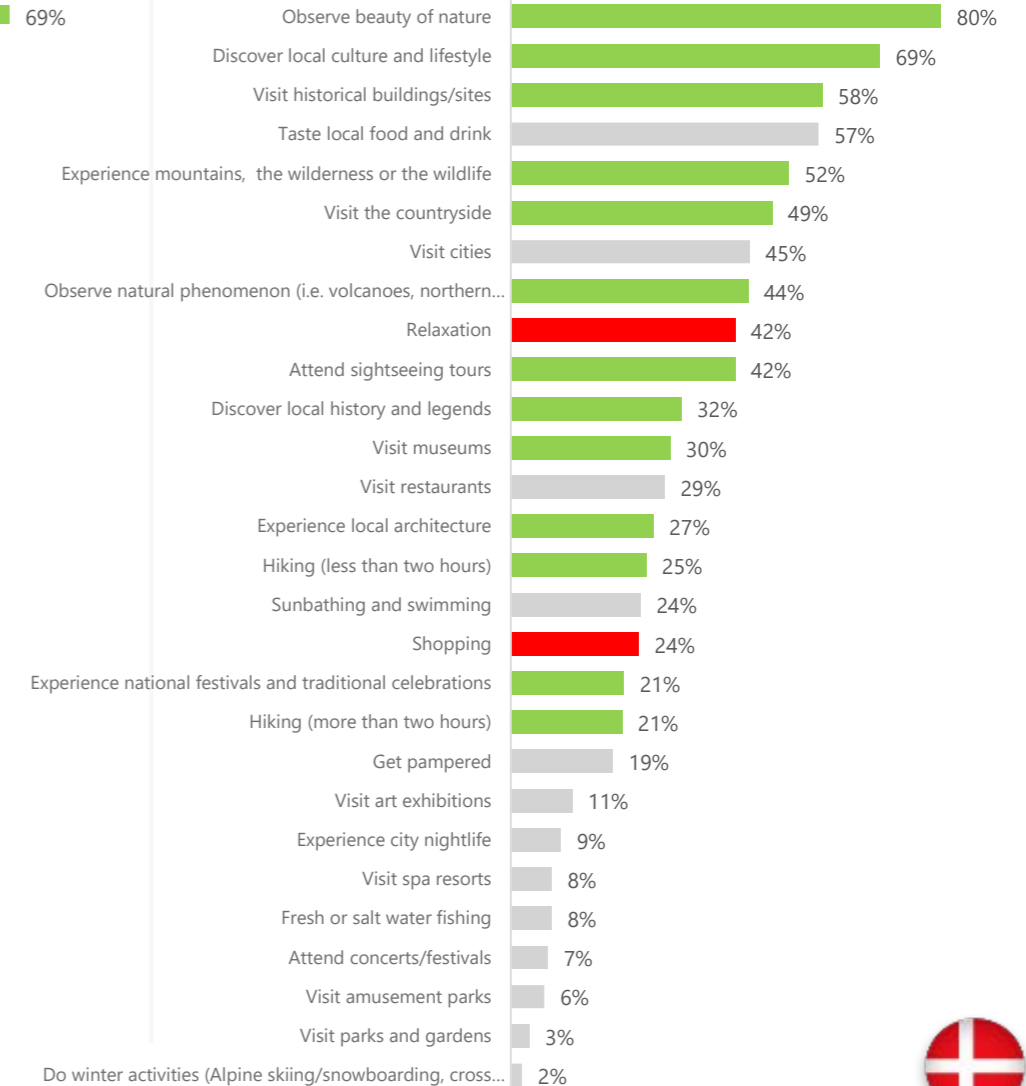
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



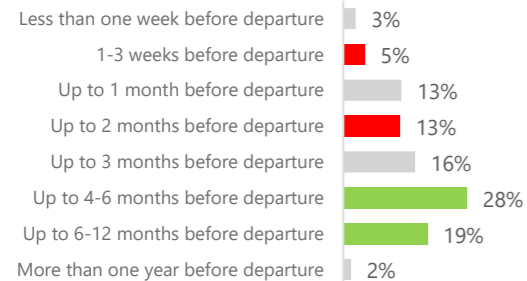
# SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Significantly over indexed in segment  
Significantly under indexed in segment

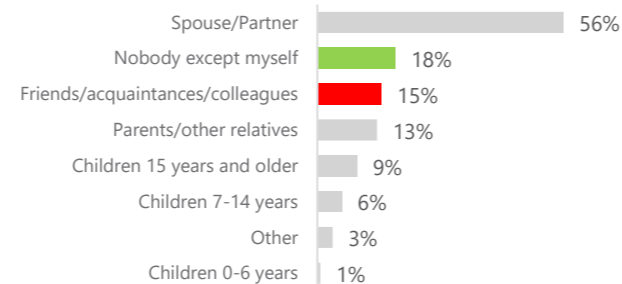
## PLANNING



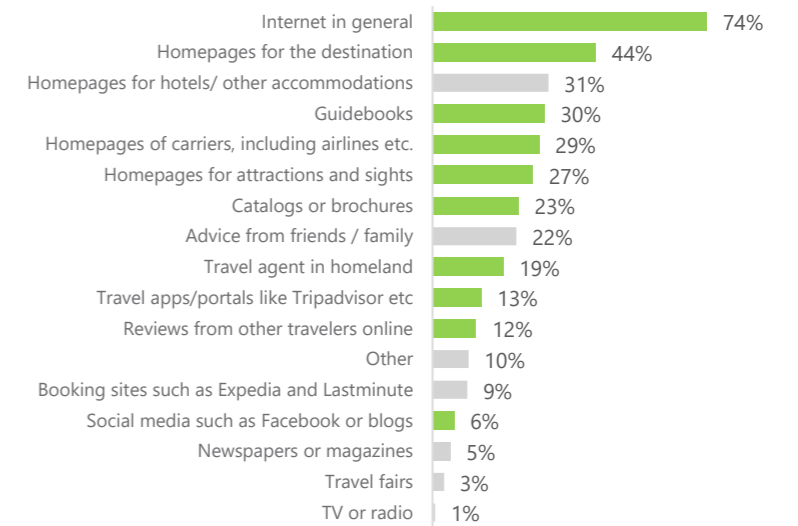
### DECISION MADE



### INFLUENCERS



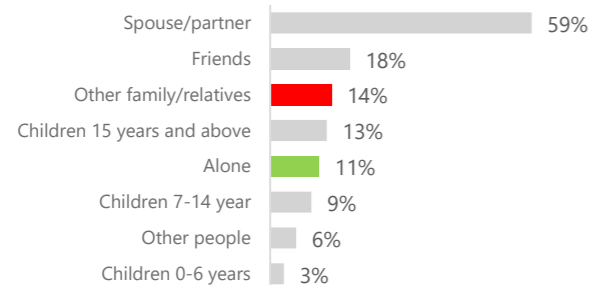
### INFORMATION SOURCES



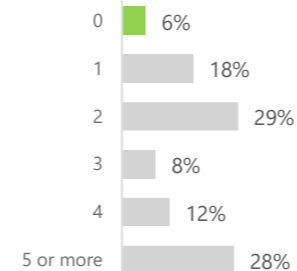
## TRAVEL COMPANIONS



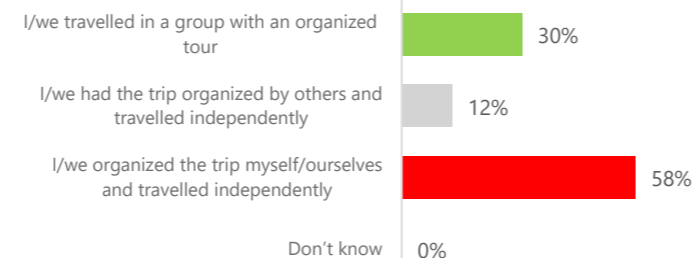
### WHO DID YOU TRAVEL WITH



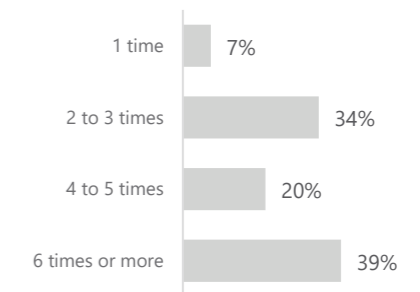
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





## 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 LUXURURY 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**. I want a vacation that makes me **feel on top of the world** and allows me to **pamper** myself.

## DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that has **is not for just anybody, that is exclusive**. Good **shopping** and good **service** is important. Of course it needs to have **good beaches**.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination should be **extravagant**, **classy**, **cultivated** and **unique**.

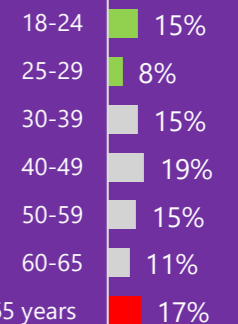
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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**. People with a busy and active social life.

**57%**  
ARE BELOW  
50 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**5%**



# EXTRAVAGANT INDULGENCE

## TYPICAL HOLIDAY OCCASIONS

You will find most of the typical **sun and beach** vacations in this segment, but you will find that it over indexes on **culinary trips**. Although, most of the time **it's all about romance!**

## I TRAVEL FOR ROMANCE AND LUXURY

These consumers choose destinations that enables them **to indulge in a bit of luxury**. Although most of the trips are in summertime it can even be in the springtime. The segment over indexes on weekend getaways (3-4 days). They often travel on **organized tours**.

## 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**.

## HOLIDAY EXPERIENCE

These consumers needs **good shopping** and of course **relaxation**. They want their **romantic spots** which they can find both in **cities** and in traditional **beach resorts**. They often **rent a car** for their romantic getaways. They stay at **high standard hotels** more than in other segments.

## SOURCES OF INSPIRATIONS

These consumers **don't spend a lot of time planning**. 69% of them settle for the trip **less than four months** before they go. They get inspired by **social media** or articles in **newspapers** or **magazines**. They also **read reviews** online to get luxurious romantic inspiration. They travel with their **partner** and gets inspired by him or her.



# EXTRAVAGANT INDULGENCE

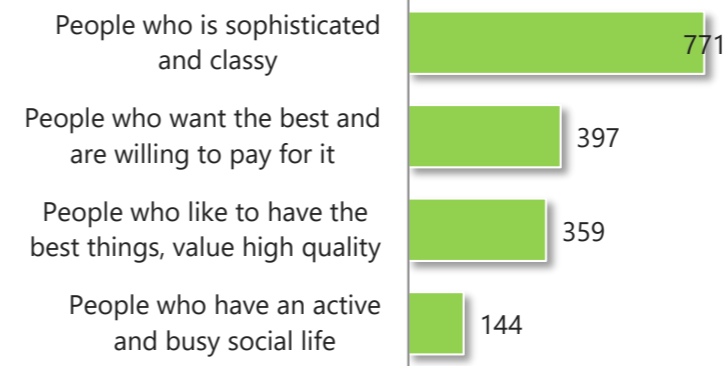
## Core motivations



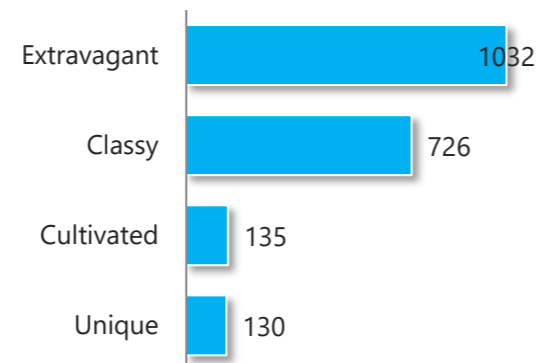
### Emotional Benefits



### Social Identity



### Personality



### Destination features



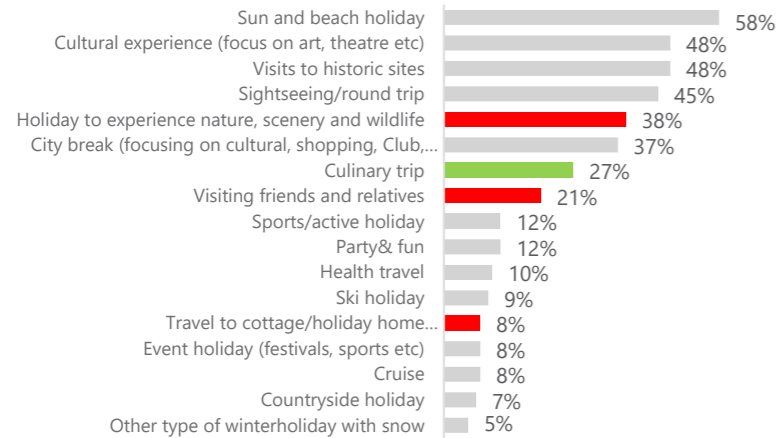
# SEGMENT PROFILE – EXTRAVAGANT INDULGENCE

Significantly over indexed in segment  
Significantly under indexed in segment

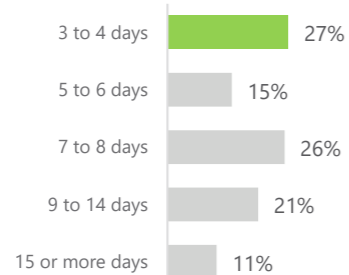
## TYOLOGY



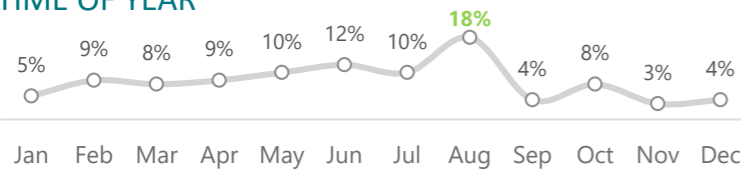
### TYPE OF HOLIDAY



### DURATION



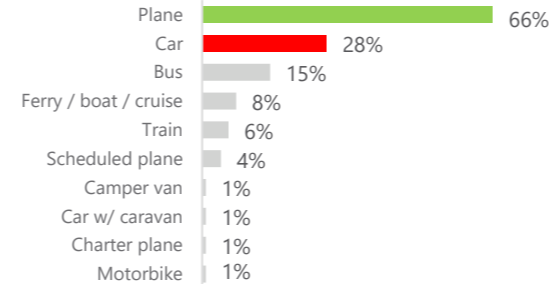
### TIME OF YEAR



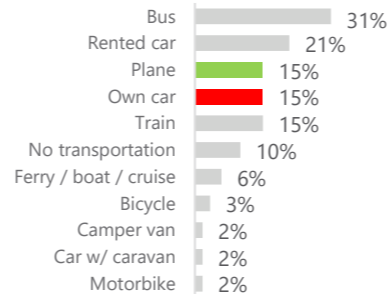
## TRANSPORT AND ACOMMODATION



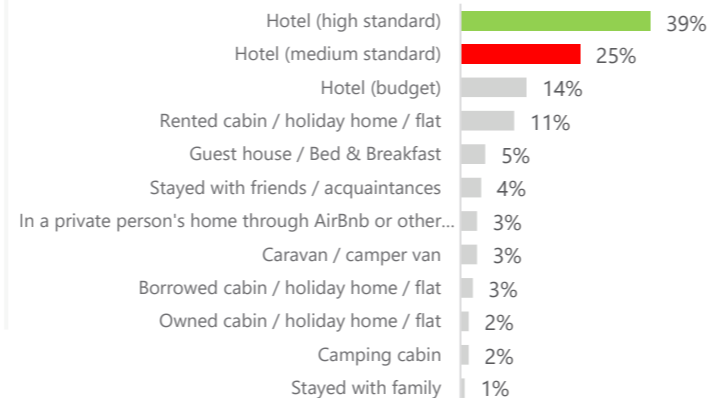
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



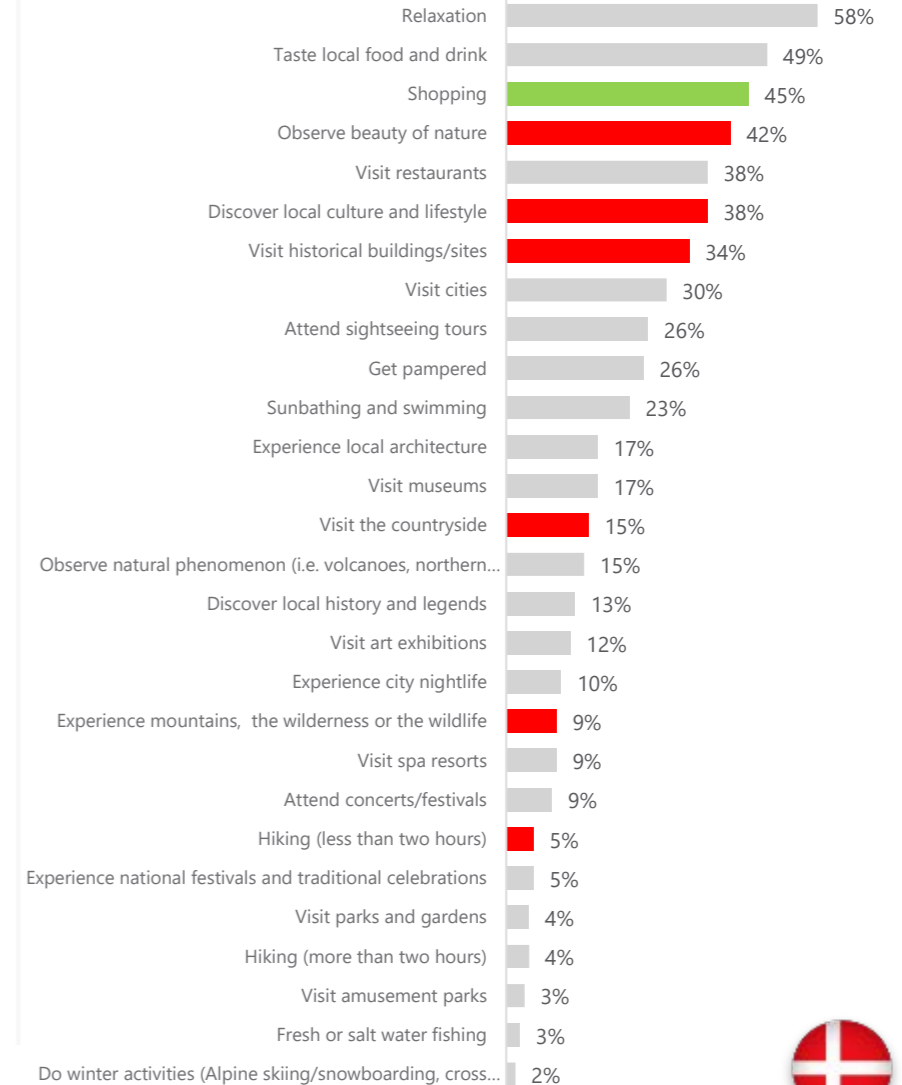
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



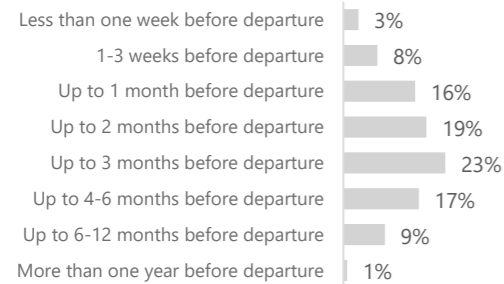
# SEGMENT PROFILE - EXTRAVAGANT INDULGENCE

Significantly over indexed in segment  
Significantly under indexed in segment

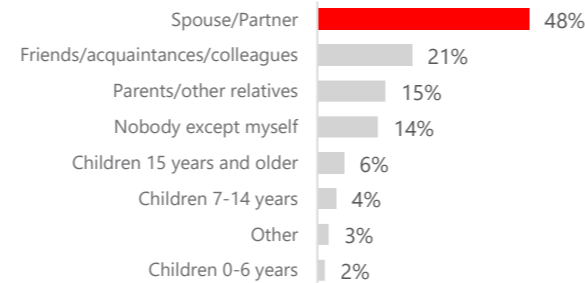
## PLANNING



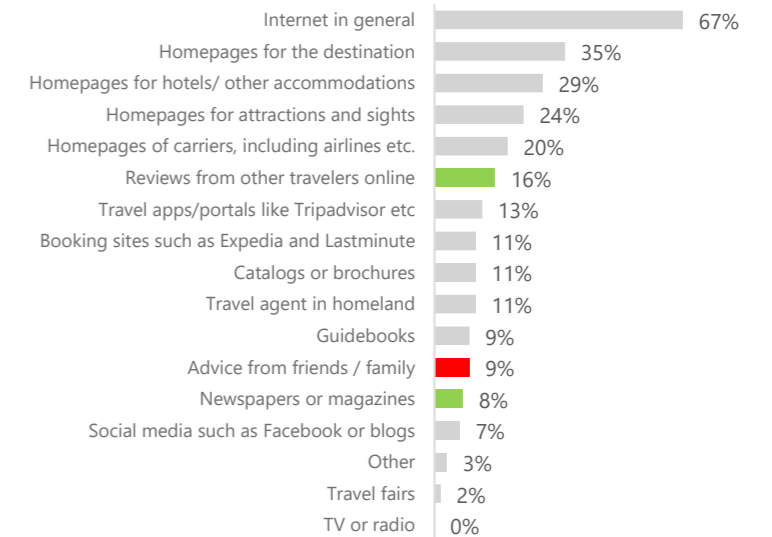
### DECISION MADE



### INFLUENCERS



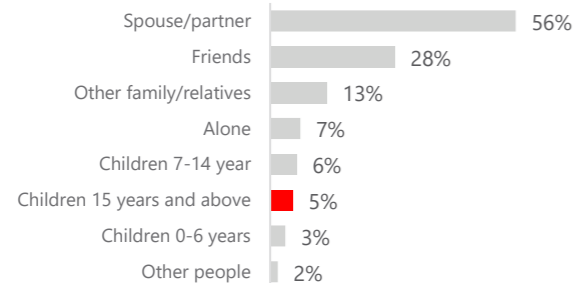
### INFORMATION SOURCES



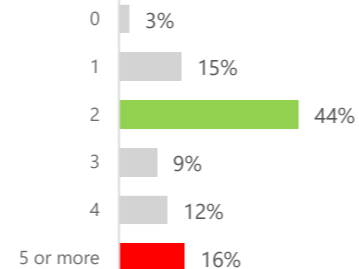
## TRAVEL COMPANIONS



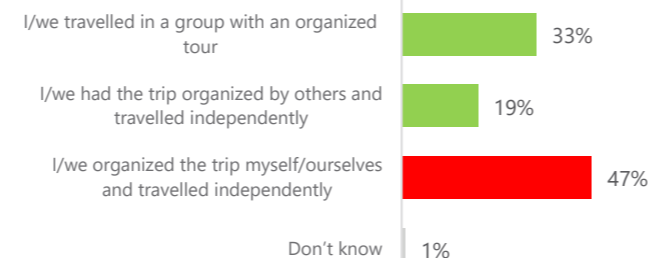
### WHO DID YOU TRAVEL WITH



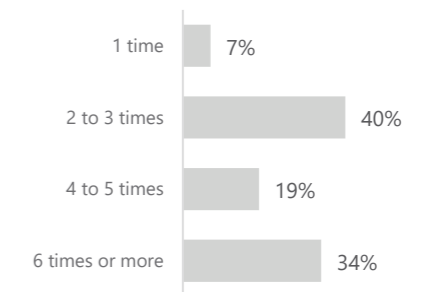
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





# 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 feel **full of energy**. Of course it should create **precious moments of togetherness** and help me to **enjoy life to the fullest**.

## 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**. The destination should be **well organized**.

## PERSONALITY; WHAT SHOULD IT STAND FOR?

The destination needs to be **active, adventurous, fresh** and **sociable**.

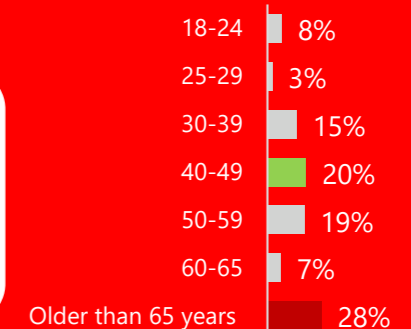
## SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who want to have as much **fun** as possible in life, and like to do things **spontaneously, impulsively**. People who want to **revitalize themselves**. People who have an active and **busy social life**, and who enjoy **spending time with friends**. You will also find people who put their **family** first.

**35%**  
ARE BETWEEN  
30-50 YEARS



SHARE OF  
OVERNIGHT  
STAYS  
**9%**



# ENERGY

## TYPICAL HOLIDAY OCCASIONS

As in most segments you will find the typical sun and beach vacation in this segment, but you will also find **ski/active holidays** and other type of holidays with snow. Of course, for some of them there has to be an element of **party and fun!**

## HOLIDAY EXPERIENCE

More than in other segments you will find activities like **hiking** and **winter activities** (Alpine skiing/snowboarding, cross country skiing, dog-sleigh, snowmobile etc.). And of course they enjoy relaxation, observe beauty of nature and taste local food and drink as much as the next man.

## I TRAVEL TO GET ENERGY

These consumers choose destinations that enables them **to live life to the fullest**. They often travel in **larger groups** (5 or more) with **friends** and with **children**, so the **social** element is also important. Many of them travel by **car** and they stay at a rented **cabin/holiday home**. More than in other segments they travel in **wintertime**.

## 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 **3 months before they go**. 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 **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**.

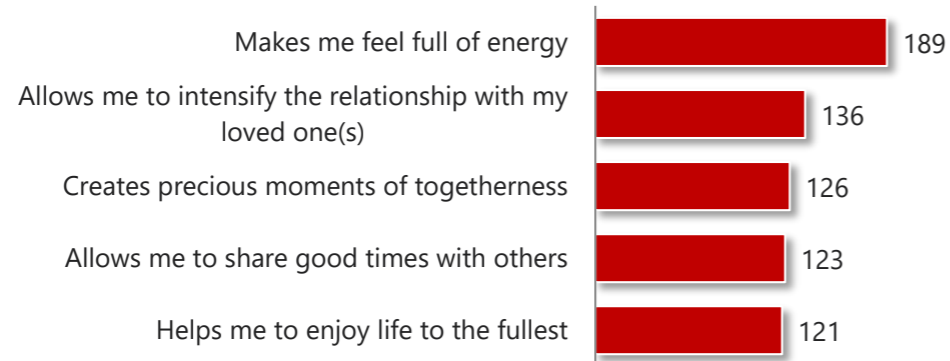


# ENERGY

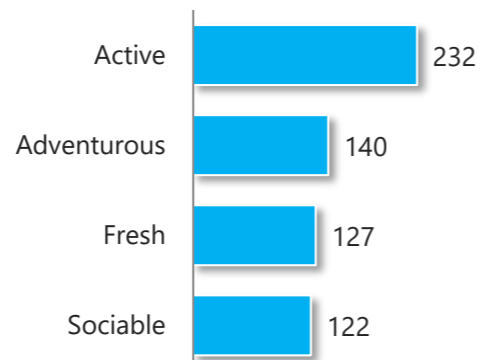
## Core motivations



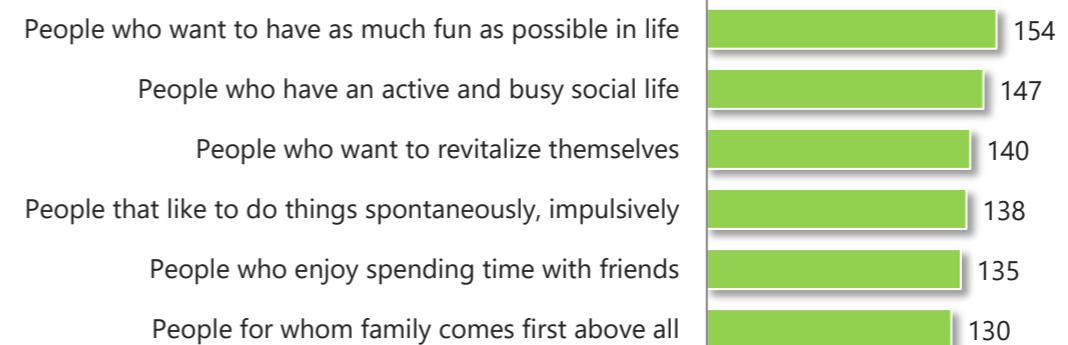
### Emotional Benefits



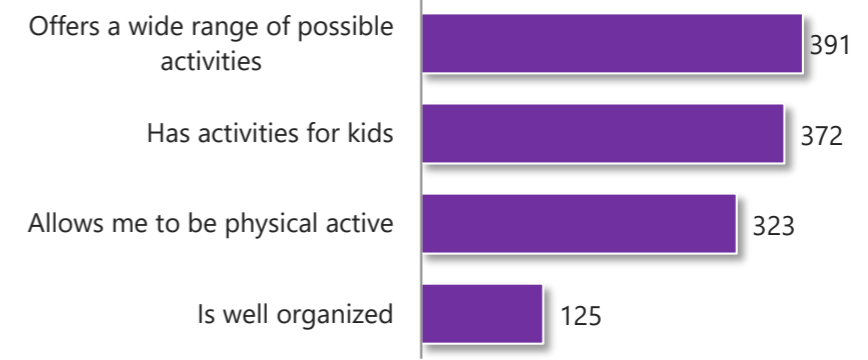
### Personality



### Social Identity



### Destination features



**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



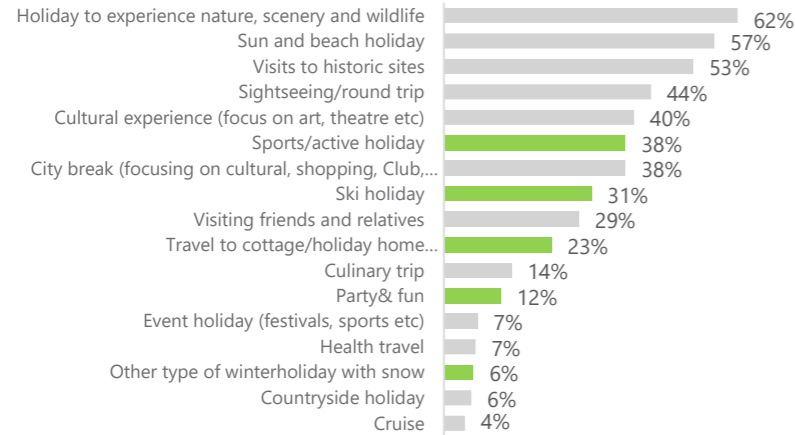
# SEGMENT PROFILE – ENERGY

Significantly over indexed in segment  
Significantly under indexed in segment

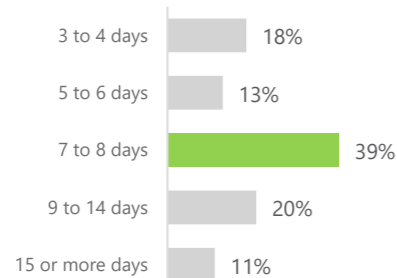
## TYOLOGY



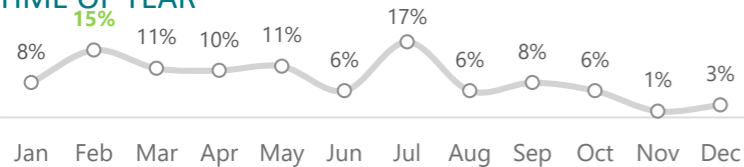
### TYPE OF HOLIDAY



### DURATION



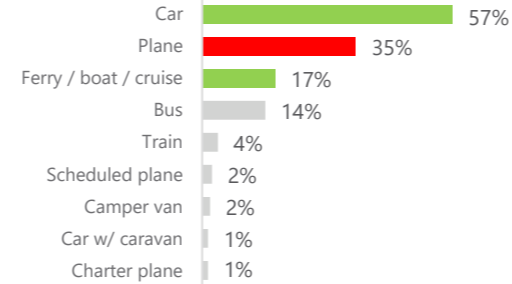
### TIME OF YEAR



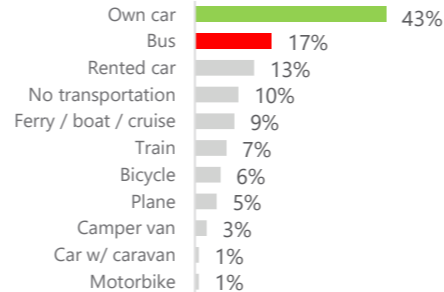
## TRANSPORT AND ACOMMODATION



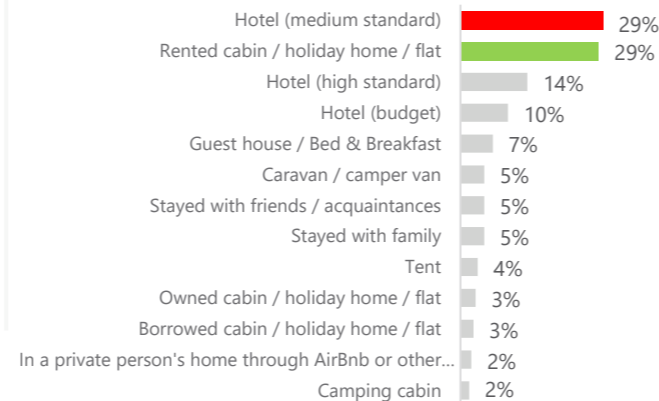
### TRANSPORT TO DESTINATION



### TRANSPORT ON DESTINATION



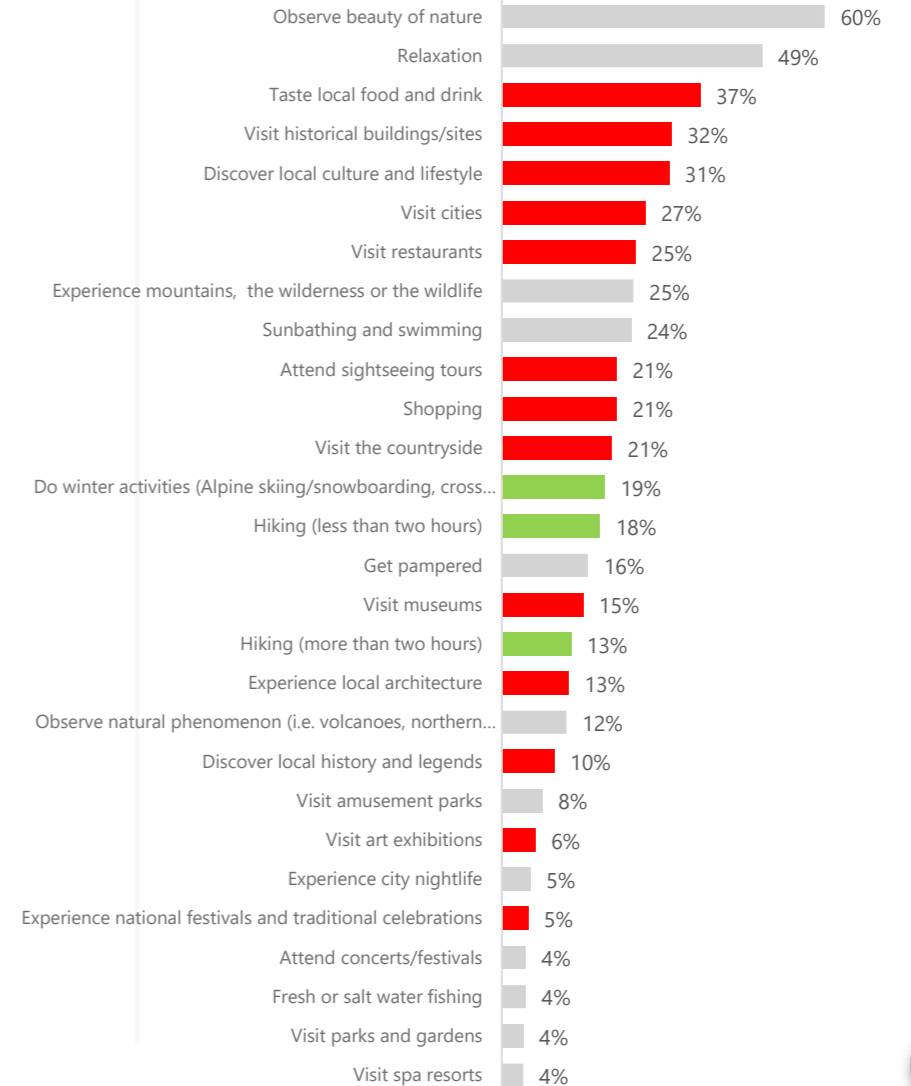
### ACCOMMODATION



## ACTIVITIES



### ACTIVITIES



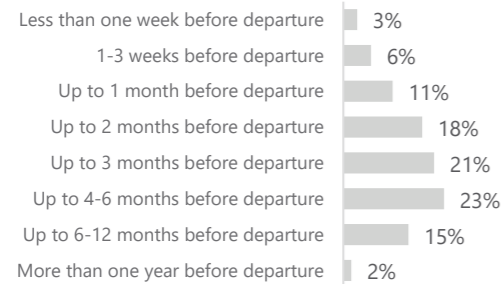
# SEGMENT PROFILE - ENERGY

Significantly over indexed in segment  
Significantly under indexed in segment

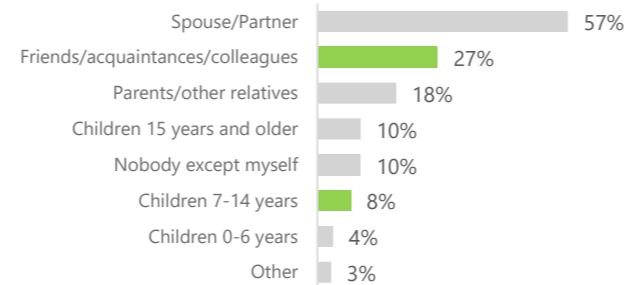
## PLANNING



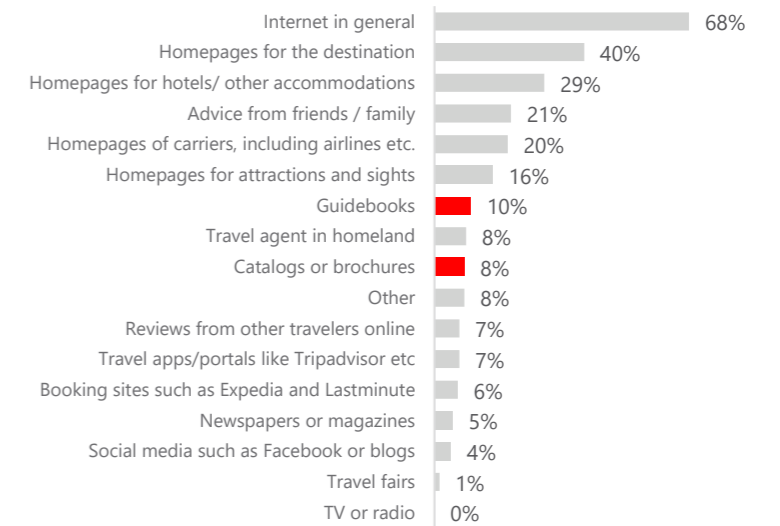
### DECISION MADE



### INFLUENCERS



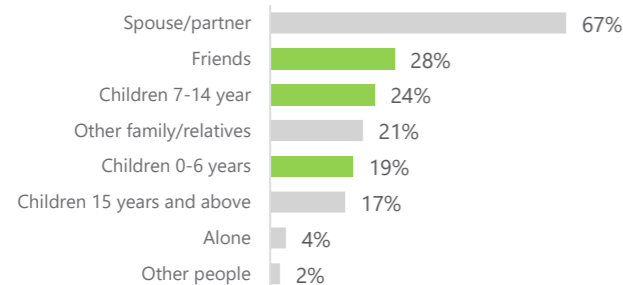
### INFORMATION SOURCES



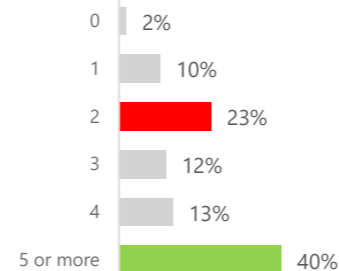
## TRAVEL COMPANIONS



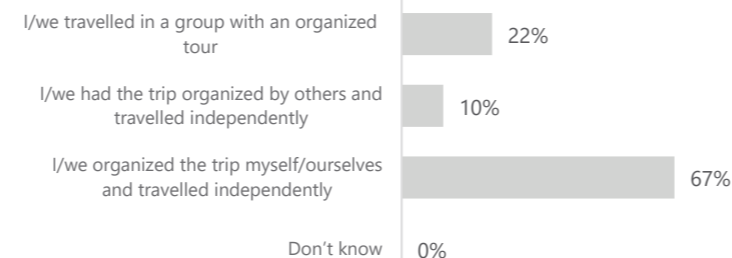
### WHO DID YOU TRAVEL WITH



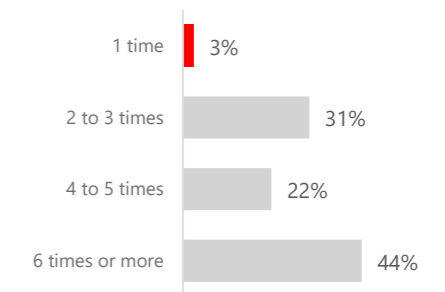
### NUMBER OF TRAVEL COMPANIONS



### HOW DID YOU TRAVEL



### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)



# 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**

## EMOTIONAL ASSOCIATIONS

Compared to other destinations, Norway has a really strong emotional footprint in Denmark. Norway is first and foremost associated with no surprises and a safe feeling, but also a place to restore harmony and balance. In addition you will find an element of liberation as well as energizing.

## DESTINATION CHARACTERISTICS

**The Danes are generally very clear on what to expect in terms of functional delivery: environmentally friendly offers, unspoiled nature, quiet environments, well organized, few language barriers and generally safe**



Ipsos Marketing



## BRAND PERSONALITY

In Denmark, Norway has quite a outspoken brand personality compared to other destinations.

For Denmark Norway is mostly seen as more predictable & practical.

The Danes also sees Norway as both fresh and active, as well as peaceful and harmonious.

This indicates a multi faceted view of Norway in the Danish market.

Who  
am i?

## SOCIAL IDENTITY

Compared to other destinations Norway has a strong footprint when it comes to social identity in Denmark.

For Denmark, Norway is the destination for people that make rational choices, avoid risk and who prefer the familiar over the unknown.

It is also the destination for people who need time for themselves, to escape from the demands of life and relax and unwind.

Norway is also seen as a place for people who have strong family values, and people who enjoy spending time with friends

So again a multi faceted image of Norway.



Ipsos Marketing

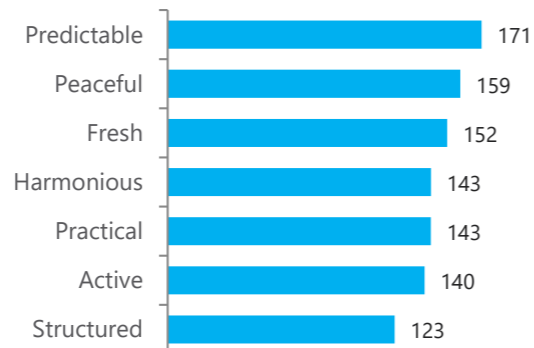


# HOW NORWAY IS PERCEIVED AS A HOLIDAY DESTINATION IN DENMARK

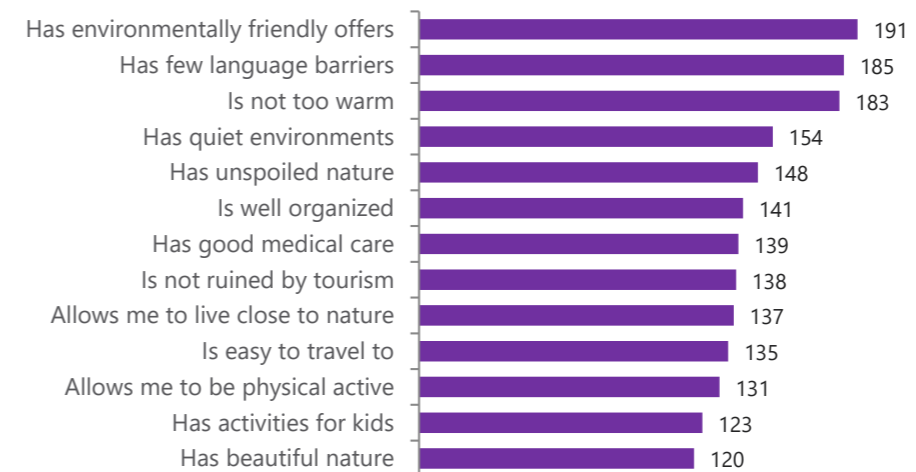
## EMOTIONAL ASSOCIATIONS



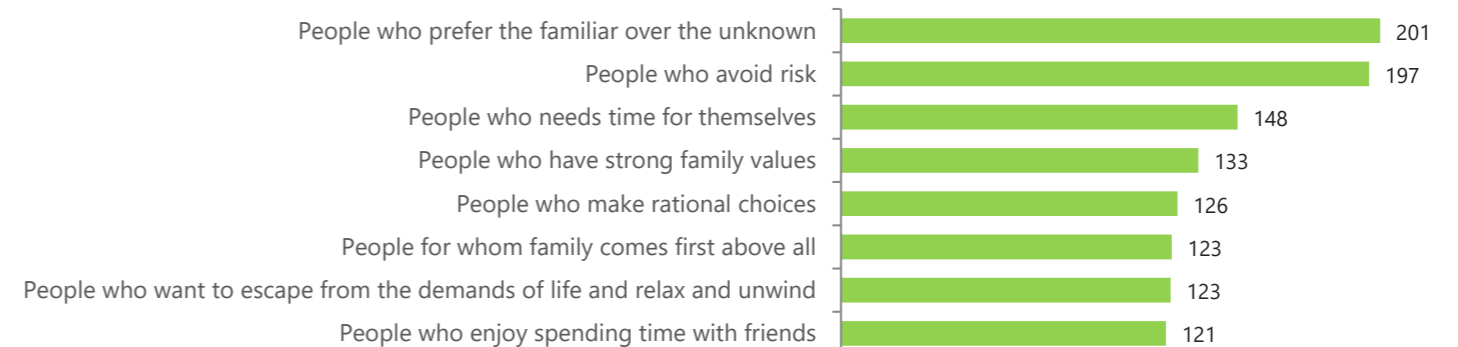
## BRAND PERSONALITY



## DESTINATION CHARACTERISTICS



## SOCIAL IDENTITY



**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





# 5

## THE COMPETITIVE LANDSCAPE

Destination fit to segments



Ipsos Marketing

# NORWAY'S FIT TO SEGMENTS IN ALL MARKETS

A clear fit to «Exploring the world of natural beauty» in most markets, but not in Denmark

Segments/ markets	Broadening My Cultural Horizon	Extravagant indulgence	Escape	Adventures in 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
<b>DENMARK</b>	<b>-0.27</b>	<b>-0.22</b>	<b>0.29</b>	<b>-0.24</b>	<b>0.19</b>	<b>0.50</b>	<b>0.05</b>	<b>0.02</b>	<b>-0.26</b>
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
NETHER- LANDS	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

Good fit  
Neutral fit  
Bad fit

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	0.16	-0.21	0.24	0.26	0.42	-0.24	-0.40	-0.22	0.12
Canada	0.09	-0.08	-0.35	0.10	-0.09	0.05	0.49	-0.19	0.25
Croatia	0.15	0.00	0.38	0.50	-0.12	-0.17	-0.23	-0.30	0.09
Czech Republic	0.05	0.00	0.24	-0.07	0.27	0.08	-0.36	-0.20	0.02
Finland	0.03	-0.22	-0.08	0.25	0.33	-0.07	-0.01	-0.10	-0.07
France	-0.03	-0.19	0.09	-0.03	-0.08	0.04	-0.38	0.31	-0.12
Germany	-0.04	-0.19	0.10	-0.29	0.77	-0.05	-0.52	0.09	-0.15
Iceland	0.06	-0.10	-0.18	0.28	-0.25	0.08	0.50	-0.35	0.26
Italy	0.15	-0.09	0.25	0.10	-0.22	-0.10	-0.42	0.21	0.02
Netherlands	-0.03	0.09	0.36	-0.12	0.54	0.00	-0.54	-0.15	-0.10
New Zealand	0.10	-0.19	-0.40	0.10	-0.25	-0.11	0.56	0.08	0.29
<b>Norway</b>	<b>0.02</b>	<b>-0.26</b>	<b>0.19</b>	<b>0.29</b>	<b>0.50</b>	<b>-0.27</b>	<b>-0.24</b>	<b>-0.22</b>	<b>0.05</b>
Portugal	0.06	0.31	0.42	0.37	-0.15	-0.01	-0.25	-0.44	0.10
Scotland	-0.05	0.13	-0.02	0.32	-0.18	0.21	0.36	-0.58	0.11
South Africa	-0.20	0.17	-0.31	0.00	-0.43	0.24	0.70	-0.23	0.09
Spain	0.29	-0.07	0.47	0.20	0.05	-0.30	-0.55	-0.06	0.19
Sweden	-0.06	-0.24	0.27	0.25	0.58	-0.22	-0.38	-0.18	-0.03
Switzerland	-0.06	-0.41	-0.22	-0.06	0.36	-0.15	-0.18	0.42	-0.15
Thailand	0.27	0.18	0.27	0.33	-0.42	-0.21	-0.11	-0.11	0.25
Turkey	0.15	0.07	0.35	0.17	-0.28	-0.16	-0.09	-0.12	0.28
United States of America (USA)	0.15	-0.18	-0.23	-0.37	0.02	-0.20	-0.06	0.45	0.27

# 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

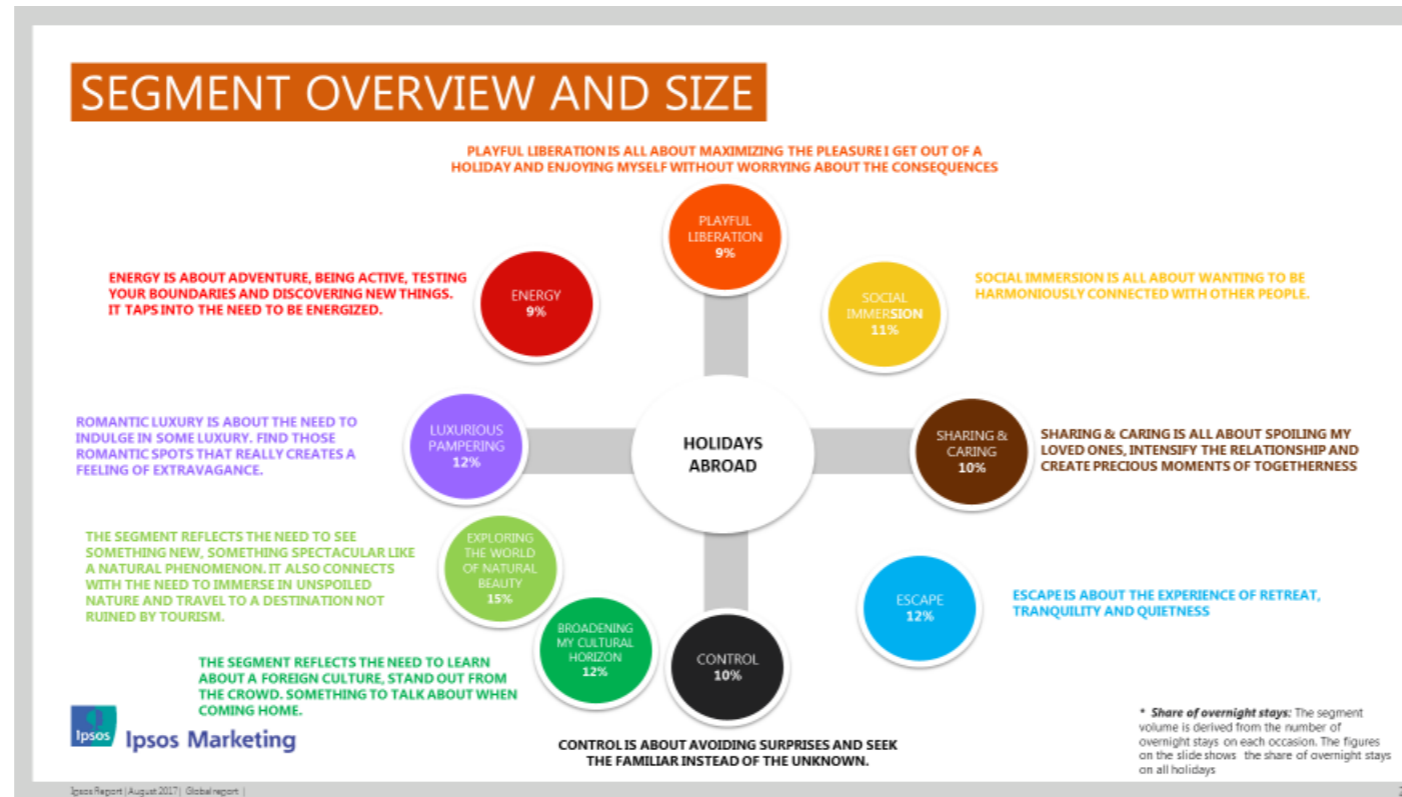
4

### 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

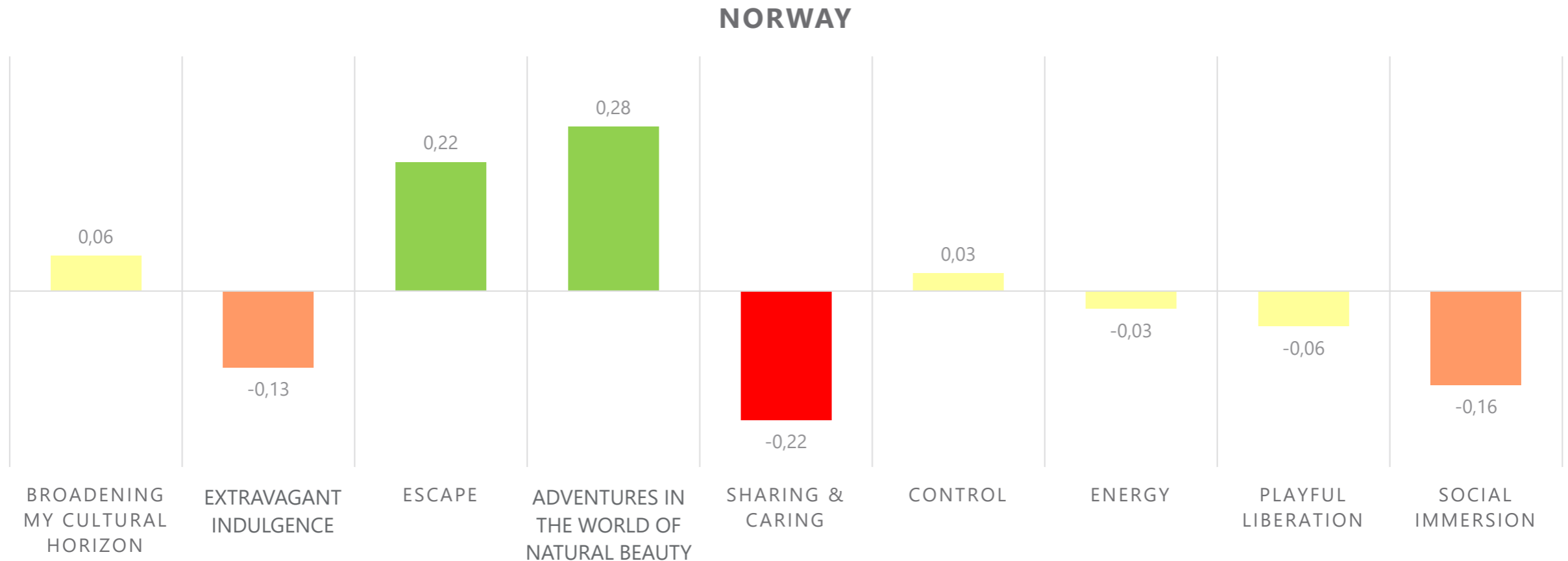
There are a lot of differences in size by market

## 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%

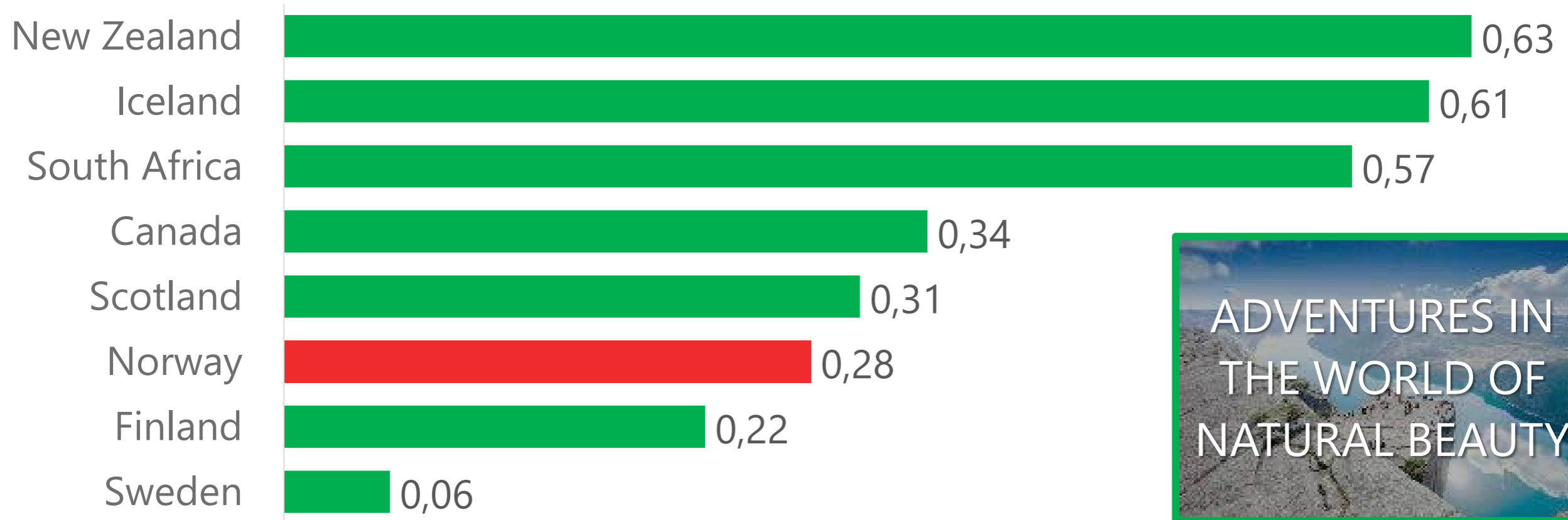
# NORWAY CONNECTS WELL WITH MULTIPLE NEEDS

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



# DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

**Nature is a highly competitive area**



ADVENTURES IN  
THE WORLD OF  
NATURAL BEAUTY

# DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

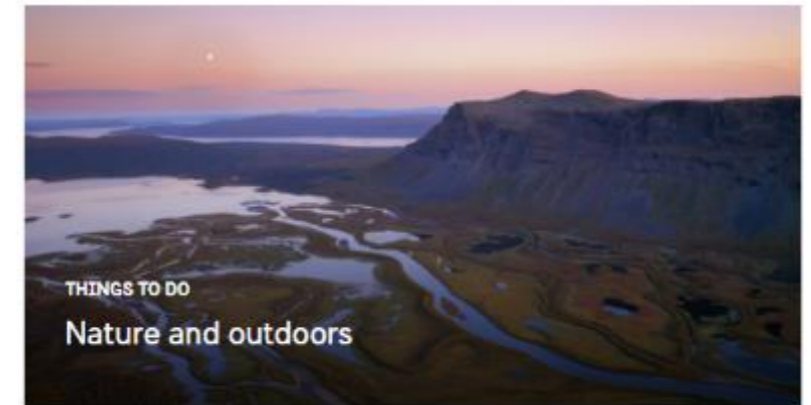
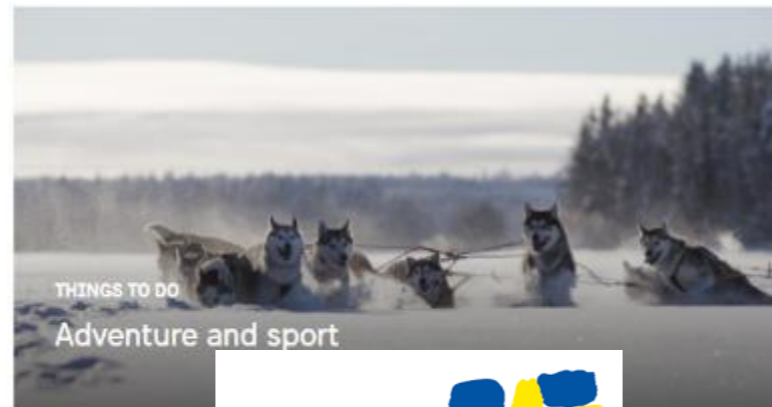
Competitive destinations too are playing on multiple needs

The screenshot displays the homepage of the '100% PURE NEW ZEALAND' website. The header includes the brand name, navigation links (International, Sign in, Sign up, Wishlist, Search), and a main menu (Home, Destinations, Things to do, Facts, Travel to NZ, Recommended trips, Transport, Accommodation). The main content area features a large hero image of a blue helicopter over a lake with a play button overlay and the word 'LUXURY' at the bottom. Below this are eight smaller tiles, each representing a different luxury experience with a title and a right-pointing arrow:

- Top luxury experiences**: New Zealand offers luxurious, bespoke experiences, making it a destination perfect for
- Luxury accommodation**
- New Zealand's Marquee Golf Courses**
- Exclusive Walking and Hiking**
- World-class Wine and Cuisine**
- Private Fly Fishing**
- Super yacht cruising**

# 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”**





7

# RECOMMENDATIONS FOR DENMARK

**Where do we go from here?**

# NORWAY NEEDS TO CONTINUE TO WORK ON HOLIDAY BASICS

## Norway fails to meet some basic holiday expectations

Good value for money

Interesting sights, rich experiences, learn more



Beautiful nature

Social, friendly

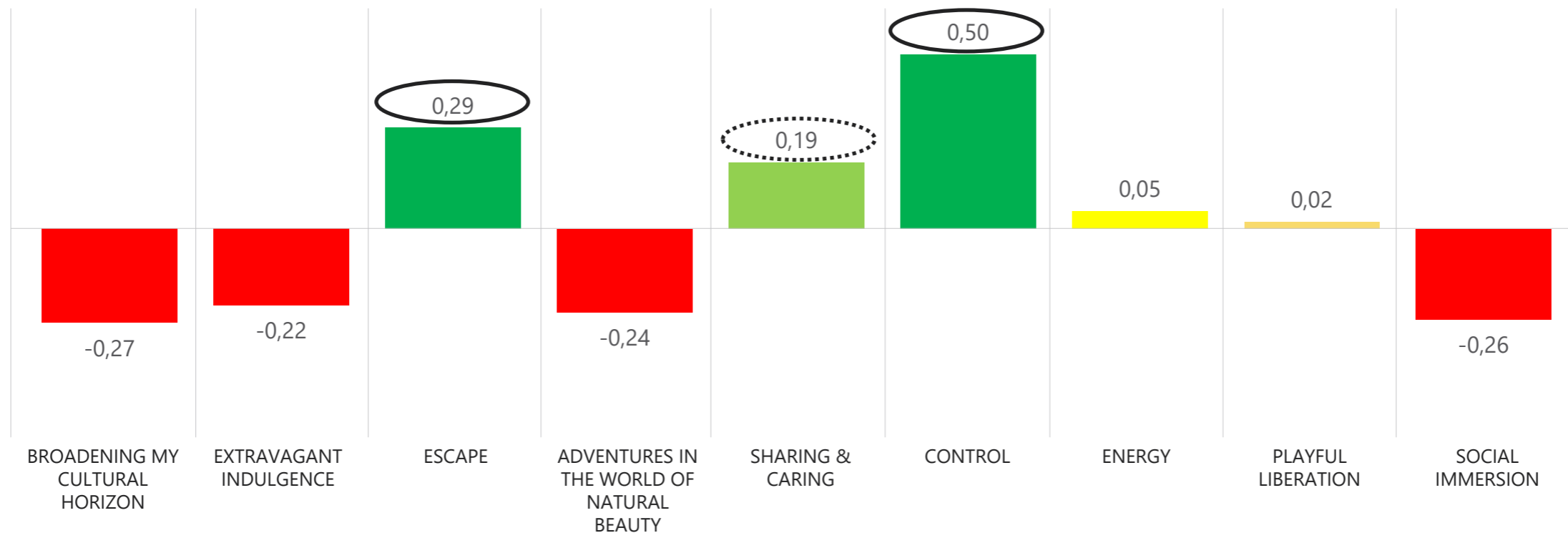
Explore and have new experiences

Escape hectic daily life, share good times

Easy to travel to

# NORWAY CONNECTS WELL WITH MULTIPLE NEEDS IN DENMARK

Highly relevant for two segments, decent relevance for additionally 1 segment



# LOOKING AT NORWAY'S CURRENT STRENGTHS AND POSITION DIFFERENT ROUTES THAT CAN BE EXPLORED

## THE OBVIOUS TARGET



**BUT!!**

### BUT IMPORTANT ADDITIONS ARE NEEDED

*To add some content to the most dominant need (control) we need to combine it with another need OR focus on another segment entirely*



A safe escape to Norway. Norway has those quiet environments you are looking for. A trip to Norway restores your sense of harmony and balance. It helps you escape from your hectic daily life.



A safe place to bring your family. A place to create precious moments of togetherness, allowing you to intensify the relationship with your loved one(s). Norway is well organized, it's safe and easy to travel to.

*«ENERGY» and «PLAYFUL LIBERATION» could also be worth looking at when developing concepts for the Danish market.*



# QUESTIONS?

Please contact...



**[kjetil.stromseth@ipsos.com](mailto:kjetil.stromseth@ipsos.com)**  
Oslo  
+47 934 52 000



**[steven.naert@ipsos.com](mailto:steven.naert@ipsos.com)**  
Antwerpen  
+ 32 497 70 64 57

