



ACTIVATING THE NORWAY BRAND

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

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NORWAY A TRUE GLOBAL BRAND

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

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

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

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

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

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

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

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



UPDATED
INSIGHTFUL
PROACTIVE

Ipsos Marketing

THE PURPOSE OF THE RESEARCH:

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

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

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

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



1

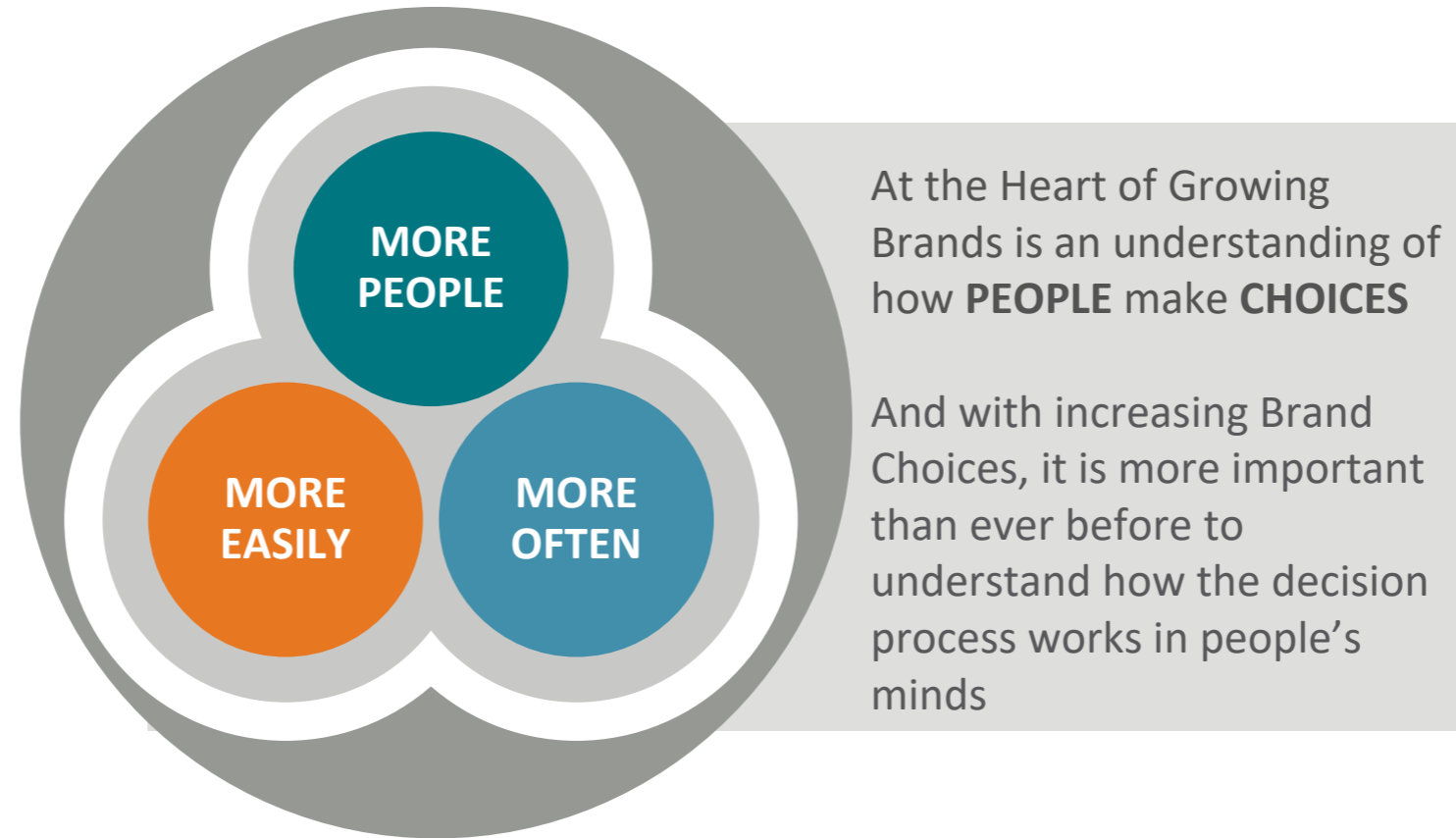
THE PHILOSOPHY BEHIND THE RESEARCH

Point of view & approach

THE STARTING POINT:

UNDERSTANDING HOW BRAND BUILDING WORKS

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



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



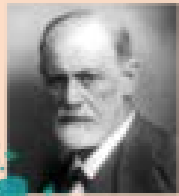
Censydiam Motivational Framework

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.

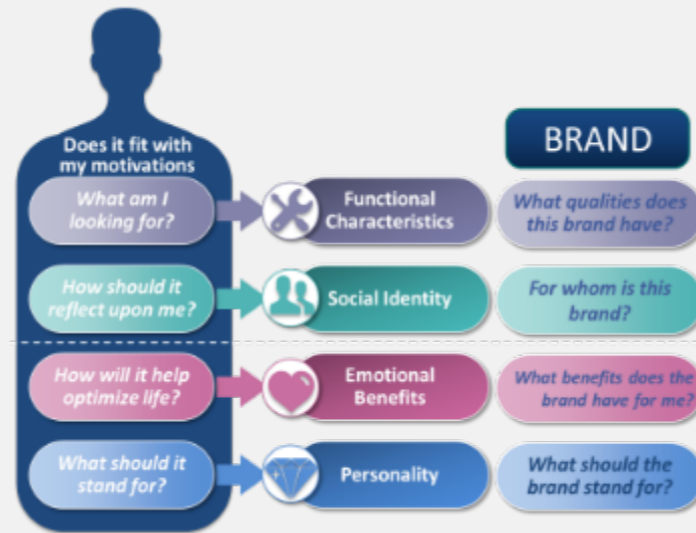
CENSYDIAM IN A NUTSHELL



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

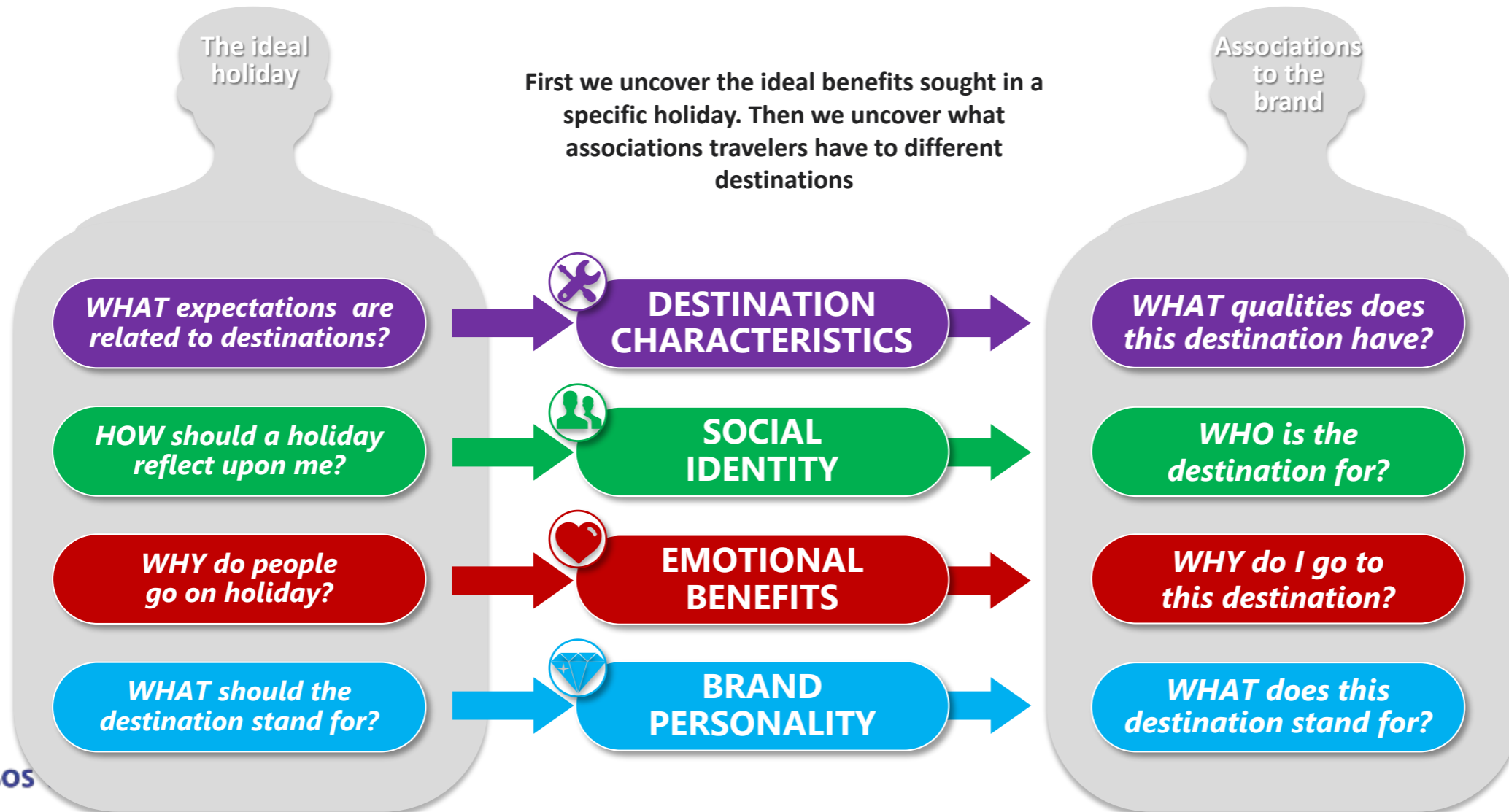


Comparison

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

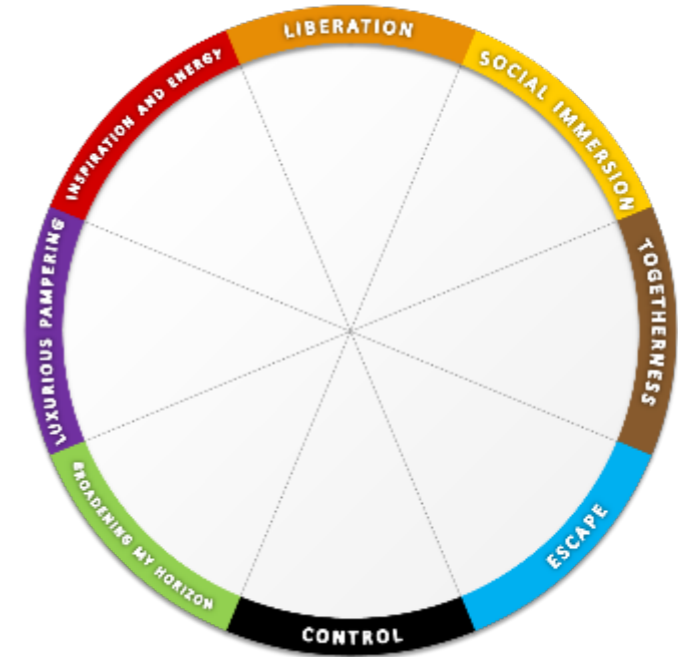
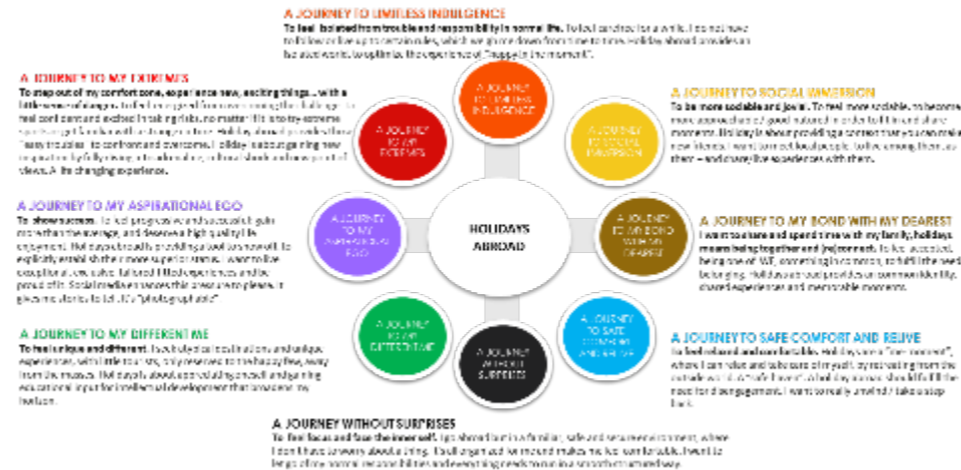
WE HAVE CONDUCTED 1200 INTERVIEWS IN THE MARKET

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.



QUESTIONNAIRE STRUCTURE IN THE QUANTITATIVE INTERVIEW

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

Section 1: Demographics and Screener

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

Section 2: Category use

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

Section 3: Awareness & usage

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

Section 4: Profiling of two holiday occasions

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

Section 5: Profiling of 2 holiday occasions

- Emotional benefits
- Functional benefits
- Personality
- Social identity

Section 6: Profiling of destinations

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

HOW DOES THE NEEDS COME ALIVE IN THE ACTUAL INTERVIEW?

The needs are formulated as statements on 4 levels



Emotional benefits

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

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



Functional benefits

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

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



Personality

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

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



Social identity

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

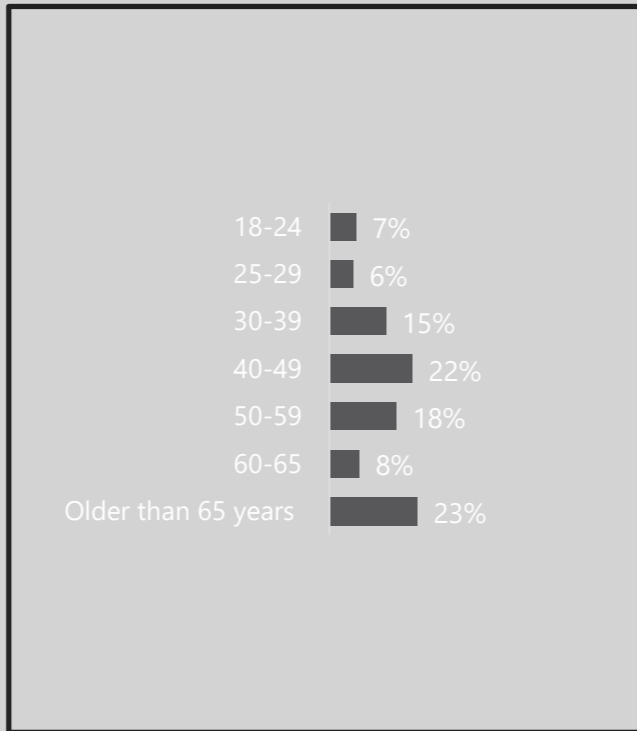
- People who want to have as much fun as possible in life
- People that like to do things spontaneously, impulsively
- People who likes to party
- People who are always looking to connect with others
- People who enjoy spending time with friends
- People who have an active and busy social life
- People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



AND NOW THE RESULTS...

SAMPLE N = 2141

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



2

THE IDEAL HOLIDAY EXPERIENCE

Category needs in the total German market

Potential needs and drivers
Holidays abroad

Main drivers in the market

EMOTIONAL BENEFITS

WHY do people go on holiday?



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



IDEAL DESTINATION CHARACTERISTICS



WHAT expectations are related to specific destination characteristics?



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



IDEAL BRAND PERSONALITY



WHAT should the destination stand for?



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



IDEAL SOCIAL IDENTITY



HOW should a holiday reflect upon me?



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





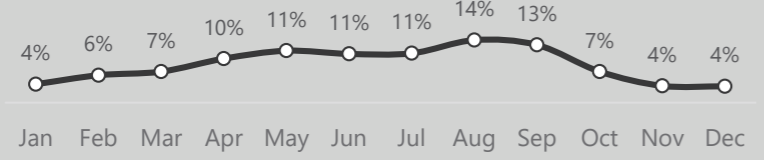
CATEGORY BEHAVIOR

With whom, how, when...

WHEN, WHO, HOW, WHERE

Highlights on German category behavior

WHEN



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

WITH WHOM

66%
Spouse/partner

HOW

70%
I/we organized the trip myself/ourselves and travelled independently

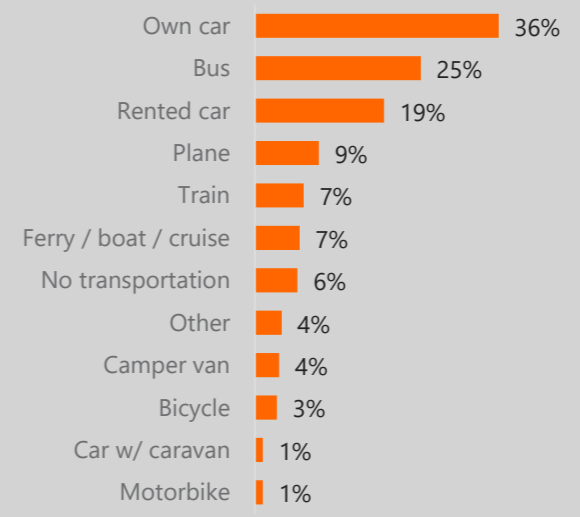
TYPE OF ACCOMODATION

61%
Lived at a hotel, in most cases a medium standard hotel

TRANSPORTATION

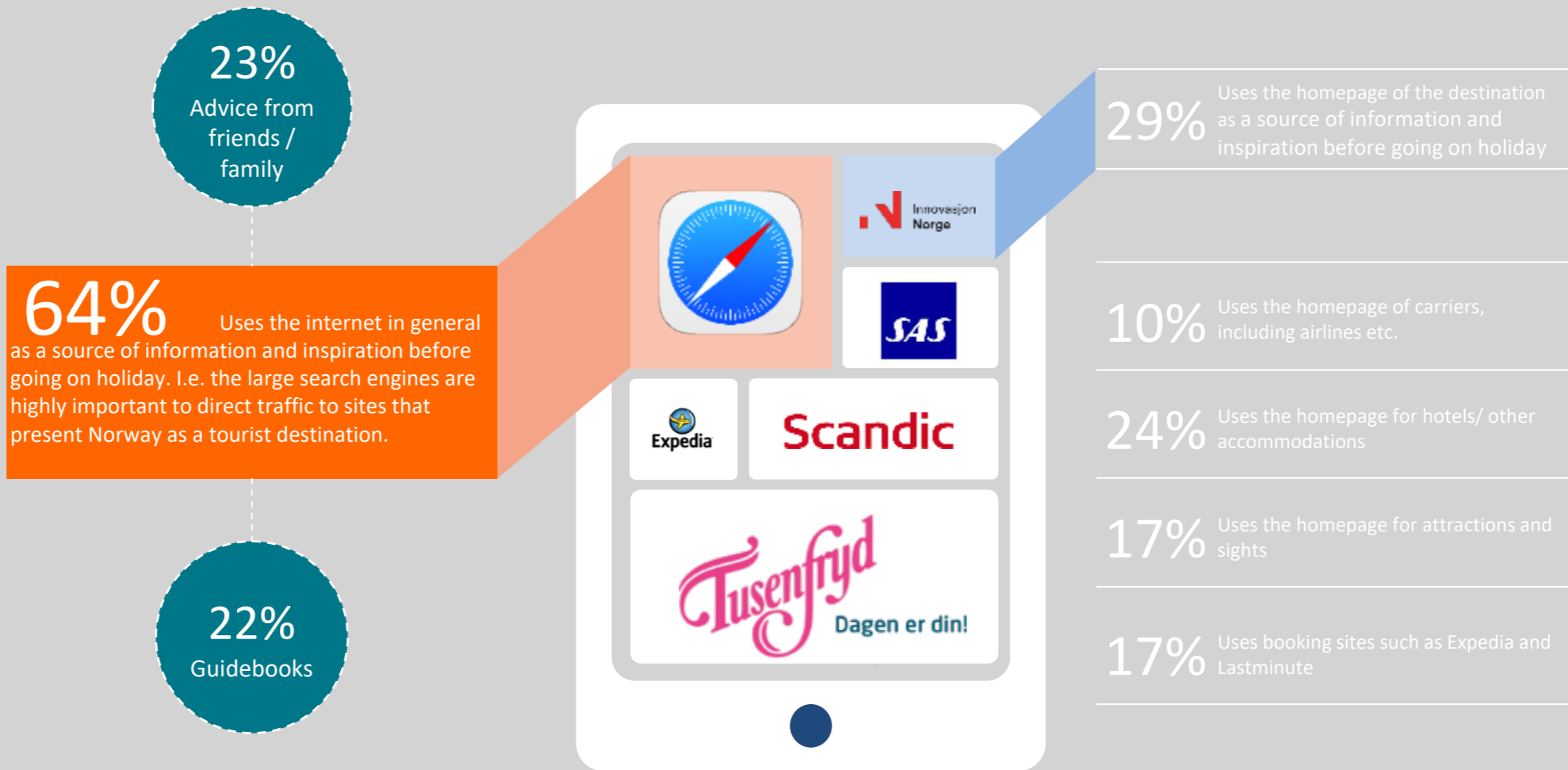
45%
Travels by plane

TRANSPORTATION DURING THE HOLIDAY



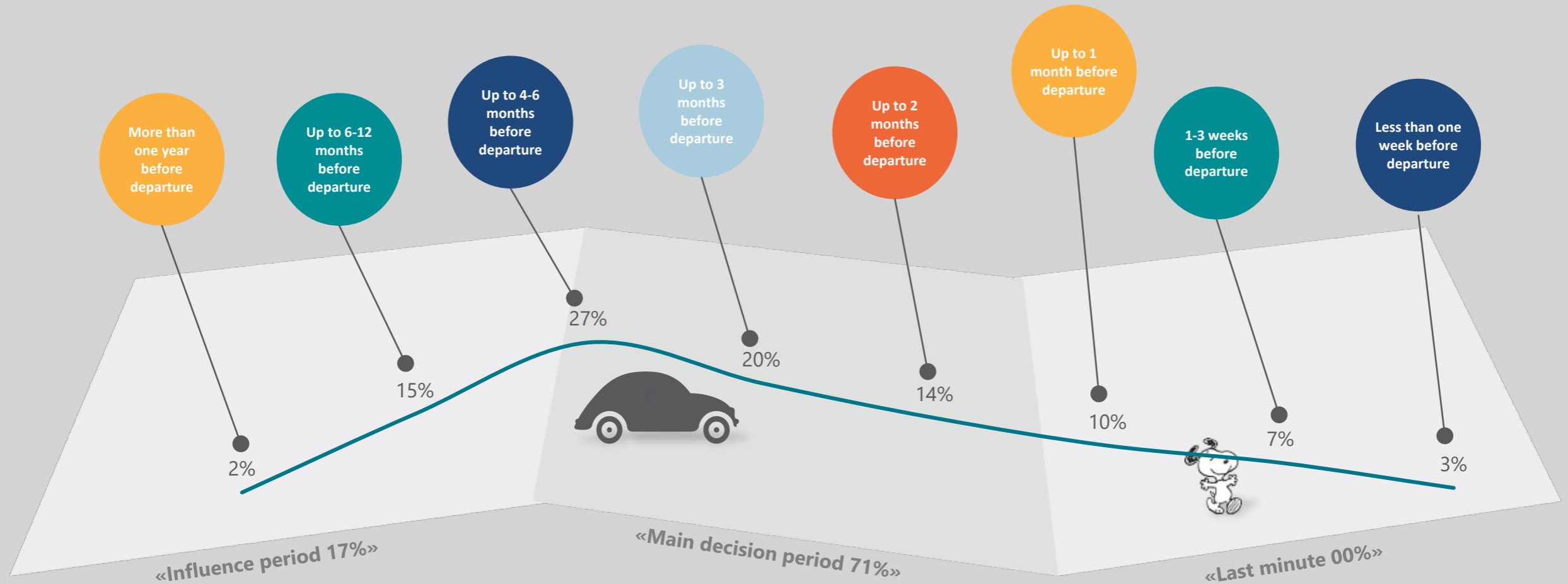
SOURCES OF INFORMATION BEFORE AND DURING TRAVEL

The digital channels are most important



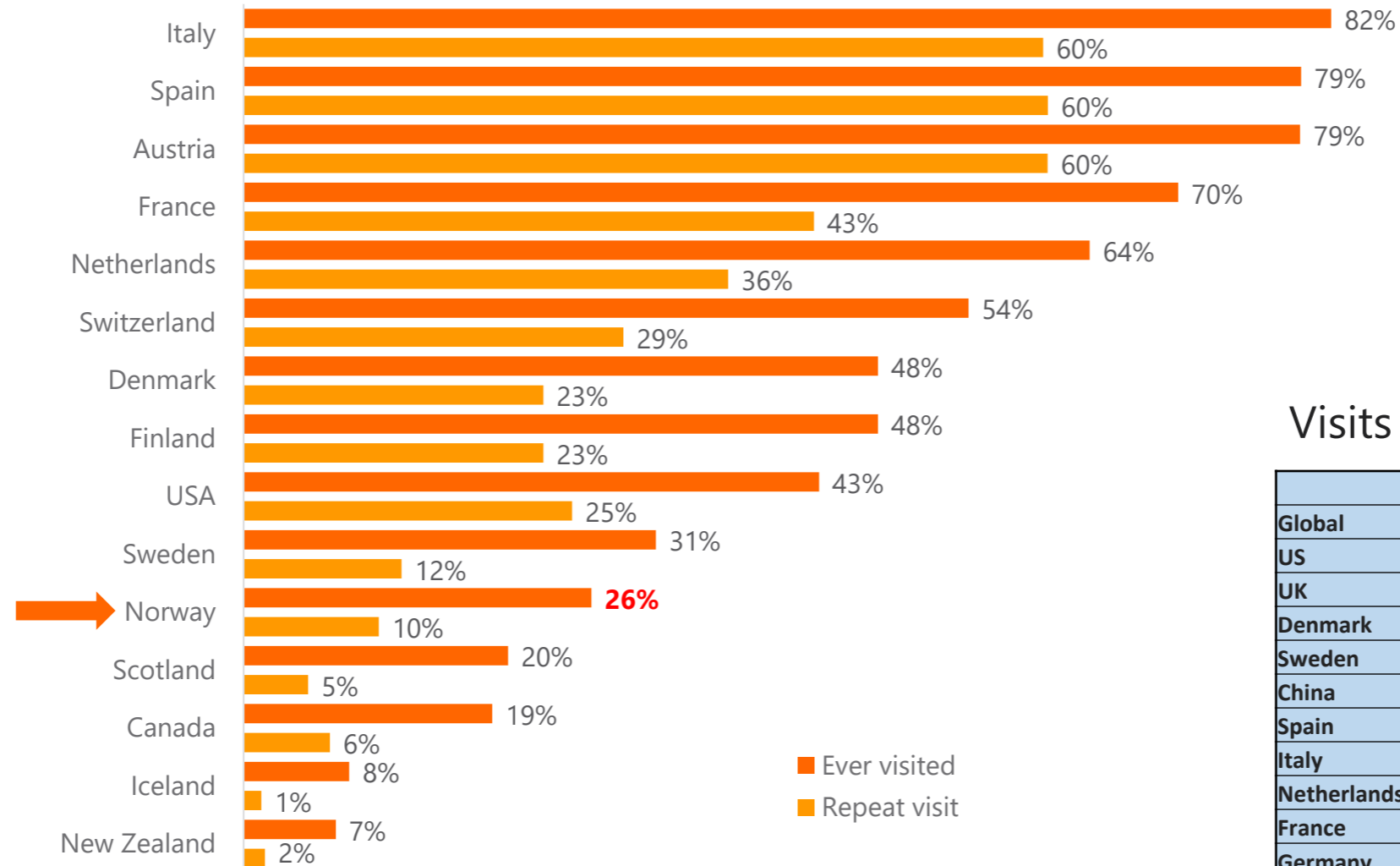
MOST TRAVELS ARE DECIDED UPON BETWEEN 1-6 MONTHS IN ADVANCE

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



EVER VISITED THIS COUNTRY?

The Germans goes to Italy



Visits to Norway all markets:

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



A NOTE ON PLANNING HORIZONS

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

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

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

3

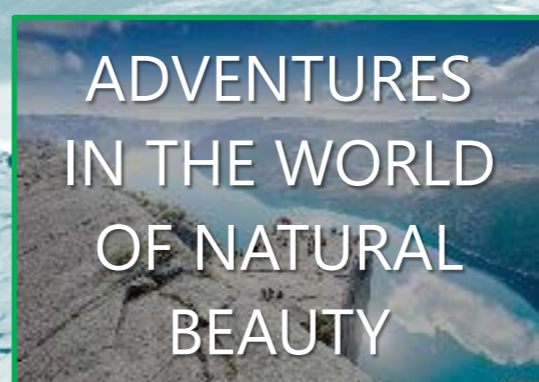
MOTIVATIONAL SEGMENTS

Why

What

Who

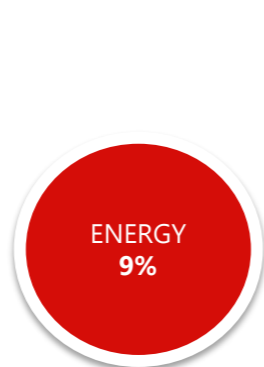
9 DISTINCT SEGMENTS



SEGMENT OVERVIEW AND SIZE*

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

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



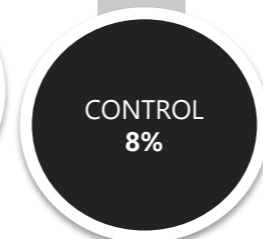
SOCIAL IMMERSION IS ALL ABOUT WANTING TO BE HARMONIOUSLY CONNECTED WITH OTHER PEOPLE.

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



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

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.



ESCAPE IS ABOUT THE EXPERIENCE OF RETREAT, TRANQUILITY AND QUIETNESS

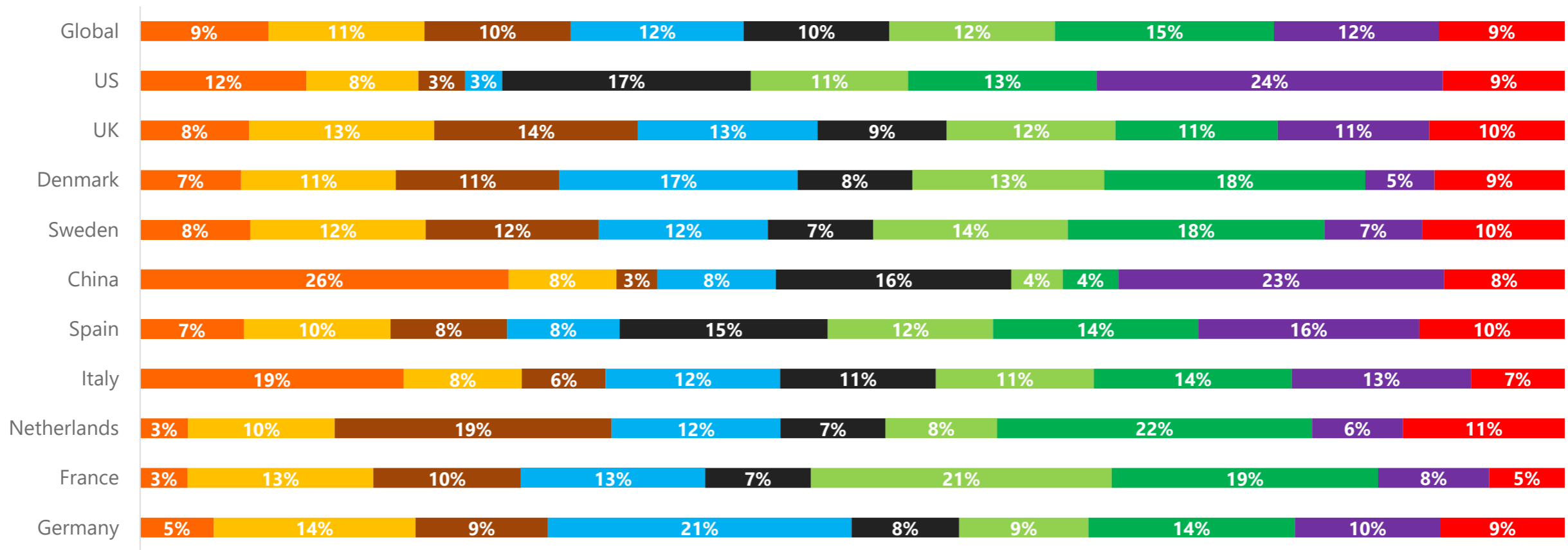
THE SEGMENT REFLECTS THE NEED TO LEARN ABOUT A FOREIGN CULTURE, STAND OUT FROM THE CROWD. SOMETHING TO TALK ABOUT WHEN COMING HOME.

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

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



SEGMENT SIZE* PER MARKET



PLAYFUL LIBERATION

SOCIAL IMMERSION

SHARING & CARING

ESCAPE

CONTROL

BROADENING MY CULTURAL HORIZON

ADVENTURES IN THE WORLD OF NATURAL BEAUTY

EXTRAVAGANT INDULGENCE

ENERGY

* 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 – GERMANY

- 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	2141	114	285	225	482	185	206	236	214	194
Sun and beach holiday	63 %	61 %	57 %	69 %	68 %	59 %	46 %	58 %	73 %	67 %
Holiday to experience nature, scenery and wildlife	45 %	41 %	44 %	30 %	46 %	41 %	43 %	72 %	34 %	50 %
Visits to historic sites	45 %	46 %	58 %	28 %	35 %	44 %	62 %	57 %	36 %	45 %
City break (focusing on cultural, shopping, Club, restaurant visits etc.)	39 %	36 %	48 %	30 %	29 %	37 %	55 %	42 %	40 %	40 %
Sightseeing/round trip	36 %	40 %	40 %	22 %	26 %	27 %	51 %	55 %	37 %	38 %
Visiting friends and relatives	28 %	29 %	37 %	33 %	23 %	21 %	26 %	34 %	25 %	28 %
Travel to cottage/holiday home (hired/own/borrowed cottage/holiday home)	25 %	20 %	19 %	34 %	33 %	21 %	18 %	24 %	17 %	25 %
Cultural experience (focus on art, theatre etc)	23 %	29 %	28 %	13 %	13 %	22 %	37 %	33 %	24 %	21 %
Culinary trip	15 %	10 %	16 %	16 %	10 %	14 %	16 %	14 %	20 %	20 %
Sports/active holiday	13 %	18 %	10 %	8 %	10 %	13 %	6 %	21 %	15 %	23 %
Ski holiday	10 %	10 %	7 %	9 %	8 %	10 %	4 %	8 %	15 %	24 %
Countryside holiday	9 %	7 %	7 %	9 %	15 %	10 %	5 %	10 %	6 %	7 %
Party & fun	8 %	14 %	10 %	9 %	4 %	9 %	5 %	8 %	8 %	15 %
Cruise	6 %	3 %	6 %	4 %	7 %	5 %	13 %	3 %	5 %	4 %
Health travel	5 %	10 %	4 %	4 %	4 %	8 %	3 %	4 %	7 %	3 %
Event holiday (festivals, sports etc)	5 %	4 %	4 %	1 %	3 %	7 %	4 %	6 %	8 %	6 %
Other type of winter holiday with snow	4 %	4 %	3 %	2 %	2 %	3 %	4 %	4 %	7 %	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 allow me to **enjoy life to the fullest**.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place with **guaranteed sunshine**, **has romantic spots** and **good beaches**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

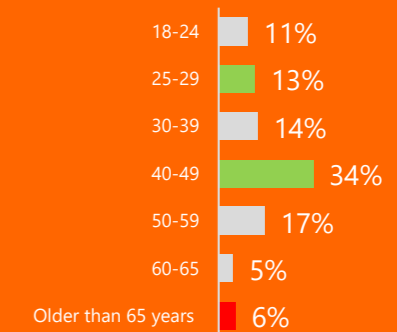
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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**.

72%
ARE BELOW
50 YEARS



**SHARE OF
OVERNIGHT
STAYS**
5%



PLAYFUL LIBERATION

TYPICAL HOLIDAY OCCASIONS

Of course you will find the typical **sun and beach** vacation in this segment. Although, most of the time it's all about **party and fun!**

I TRAVEL TO FEEL GOOD

These consumers choose destinations that makes them **have as much fun as possible**. They want to party, and **enjoy** themselves and do things **spontaneously** and **impulsively**. They want to travel to places that are **playful, fresh** and **open-minded**. 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.

SOURCES OF INSPIRATIONS

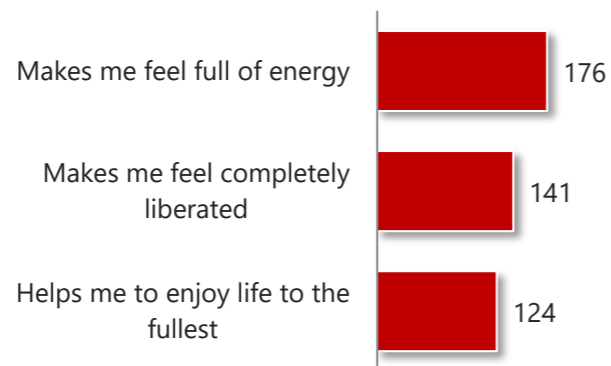
These consumers **spend a lot of time planning** where to go. Most of them settle for the trip **months** before they go. They plan their trip by searching the **internet**, checking **homepages for the destinations** or using **social media**. **Partners and friends** heavily influences their choice.



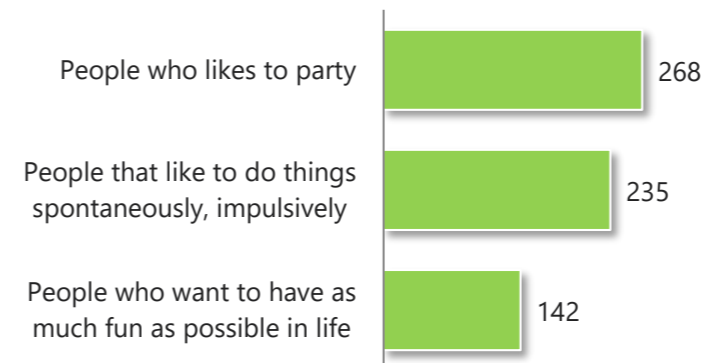
PLAYFUL LIBERATION - ACTIVE, RELAXED AND FRESH

Core motivations

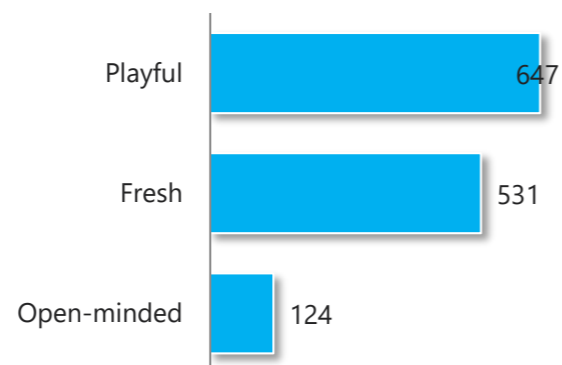
Emotional Benefits



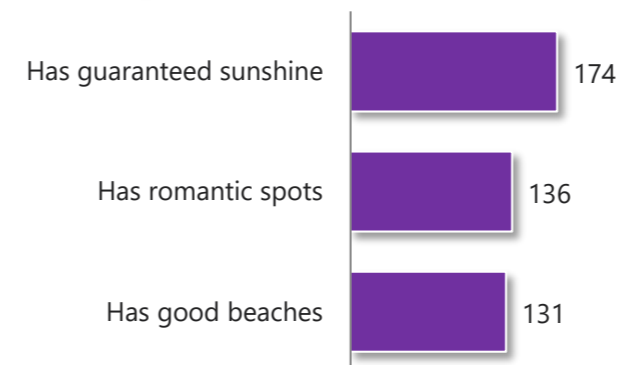
Social Identity



Personality



Destination features



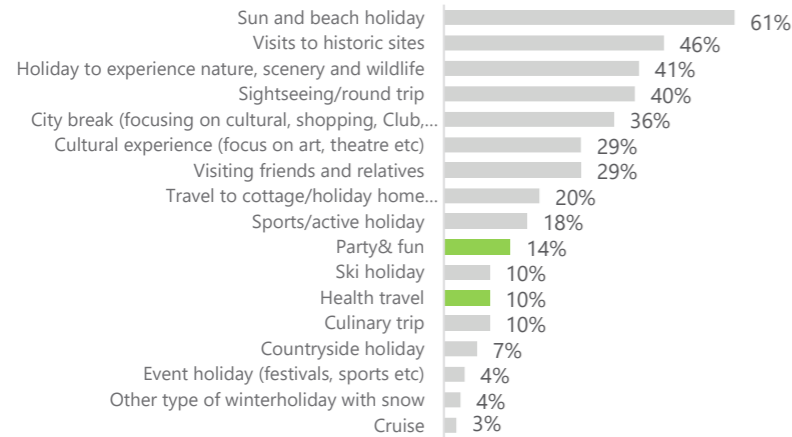
SEGMENT PROFILE – PLAYFUL LIBERATION

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

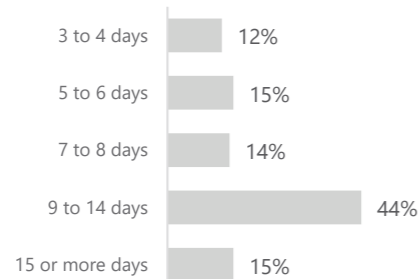
TYOLOGY



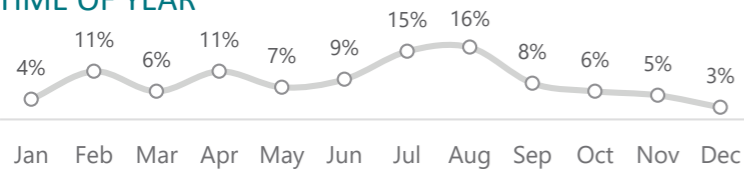
TYPE OF HOLIDAY



DURATION



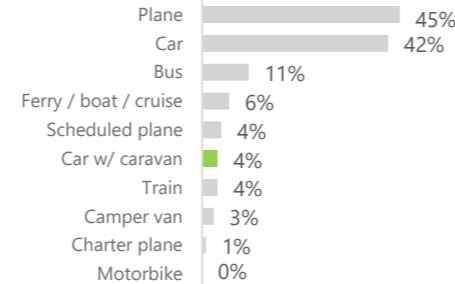
TIME OF YEAR



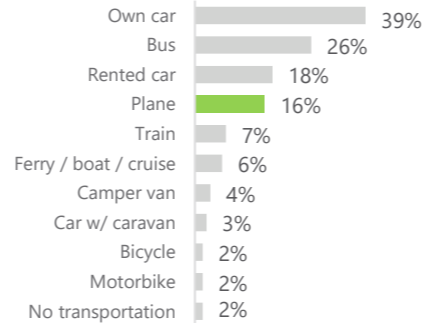
TRANSPORT AND ACOMMODATION



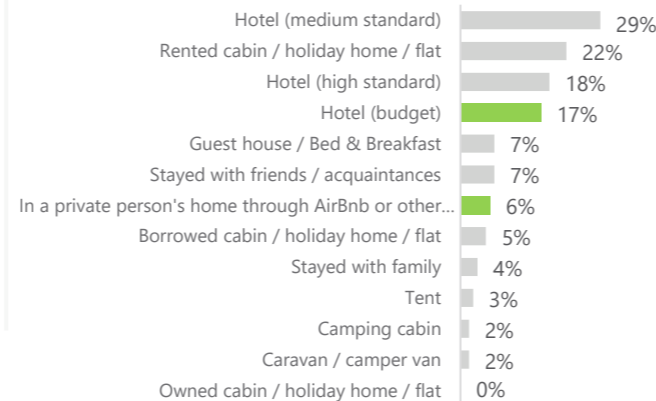
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



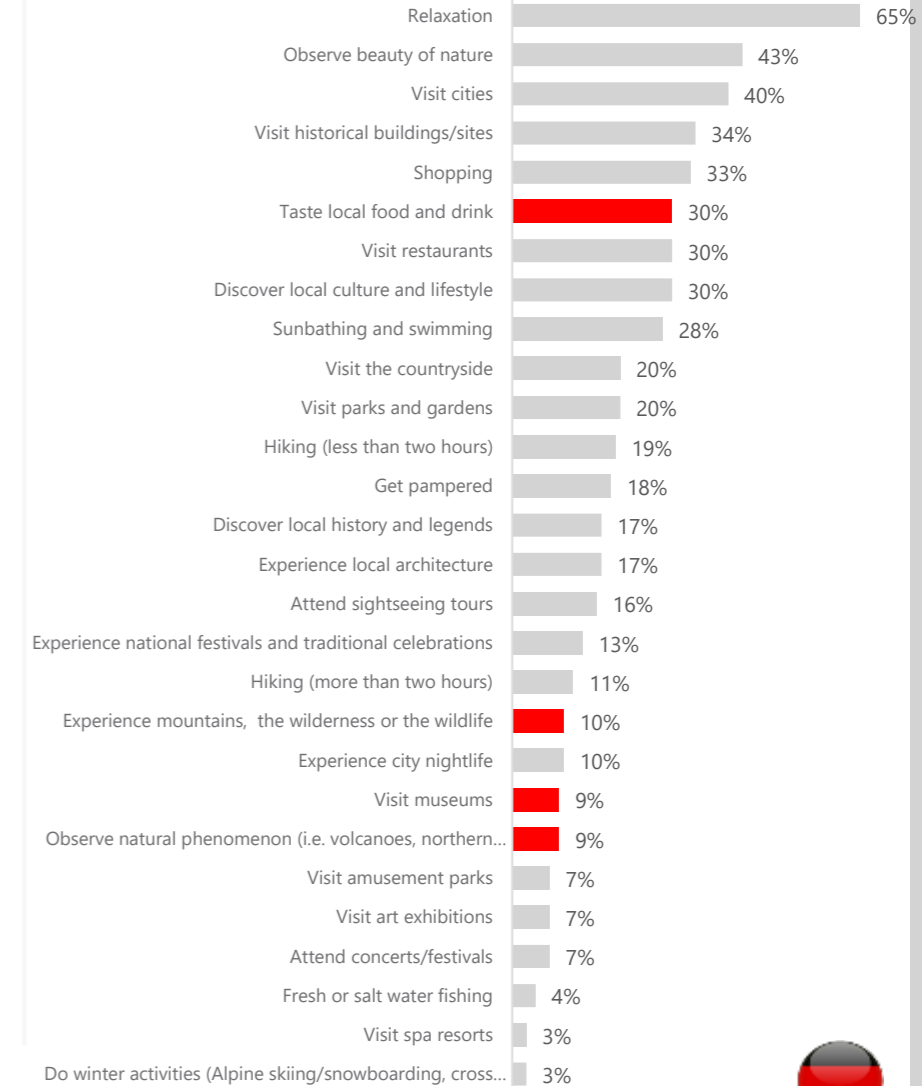
ACCOMMODATION



ACTIVITIES



ACTIVITIES



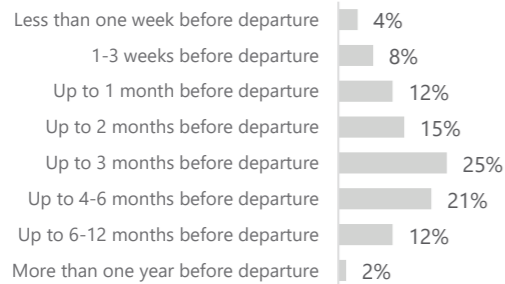
SEGMENT PROFILE - PLAYFUL LIBERATION

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

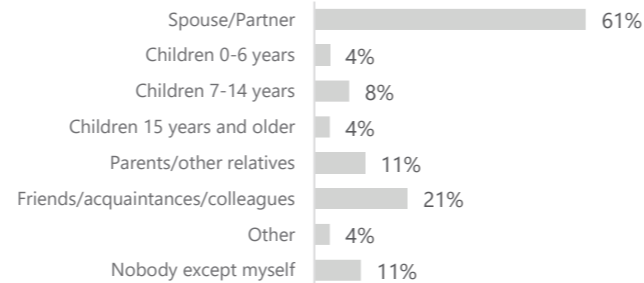
PLANNING



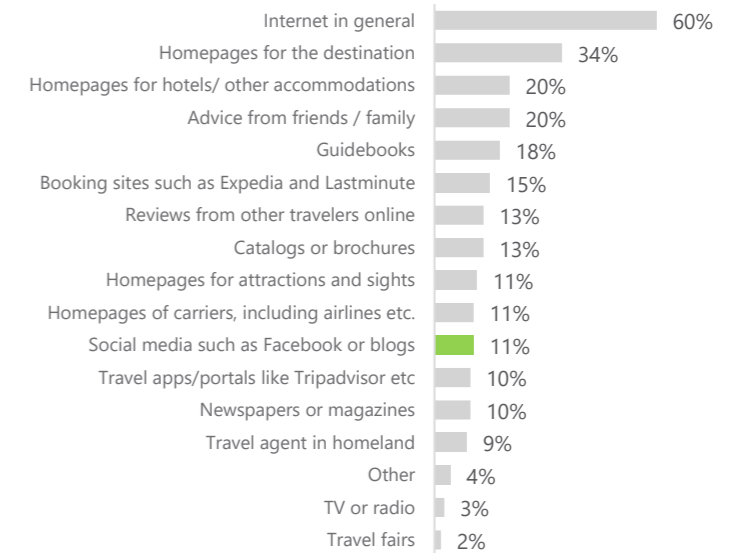
DECISION MADE



INFLUENCERS



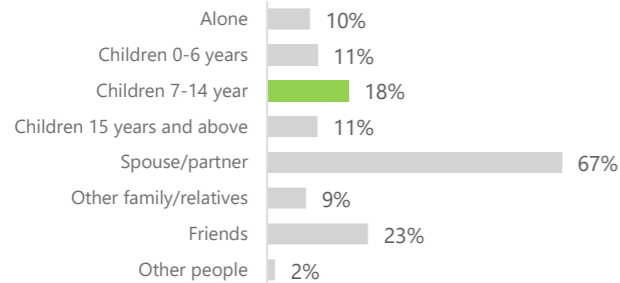
INFORMATION SOURCES



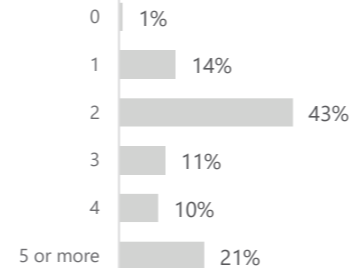
TRAVEL COMPANIONS



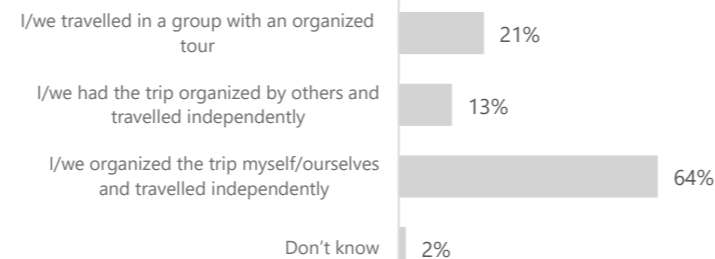
WHO DID YOU TRAVEL WITH



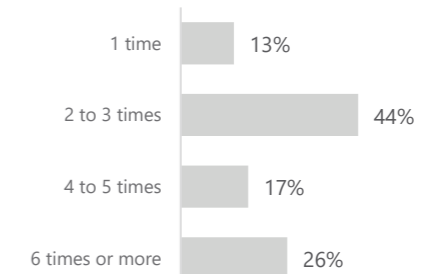
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





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**, interesting **culture** & art and a **rich cultural heritage**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

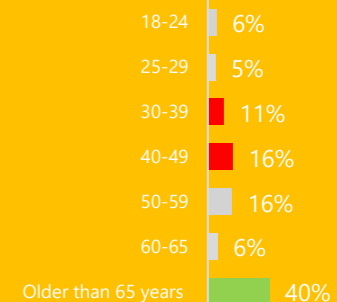
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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**.

40%
ARE ABOVE
65 YEARS



SHARE OF
OVERNIGHT
STAYS
14%



SOCIAL IMMERSION

TYPICAL HOLIDAY OCCASIONS

In this segment you will find trips to **visit historical sites** and as well as **city breaks**. There are of course some sun & beach holidays here but moreover you will find holidays to **experience scenery and wildlife** and at lot of **sightseeing/ round trips**.

I TRAVEL TO MEET THE LOCALS

These consumers want to **taste local food and drinks**. They want to visit cities and **discover local culture and lifestyle**. Local **history and legends** are also of interest. As well as **museums, parks and gardens**. The experience of **concerts/festivals and city nightlife** 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 **4-6 months before their departure** (36%). They act on advice from **friends and family**. Their **spouse/partner** and **friends** heavily influences their choice.



SOCIAL IMMERSION - ACTIVE, RELAXED AND FRESH

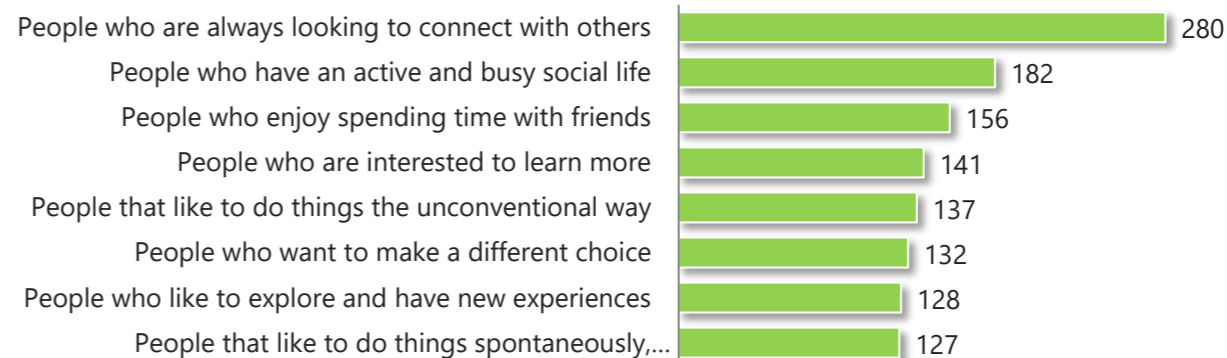
Core motivations



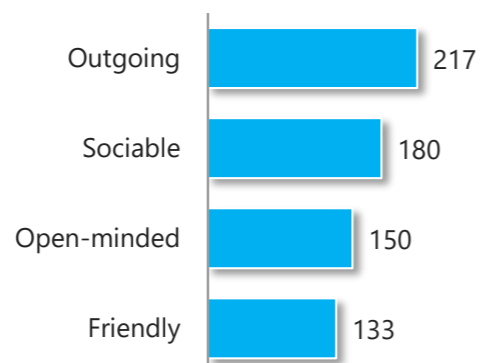
Emotional Benefits



Social Identity



Personality



Destination features



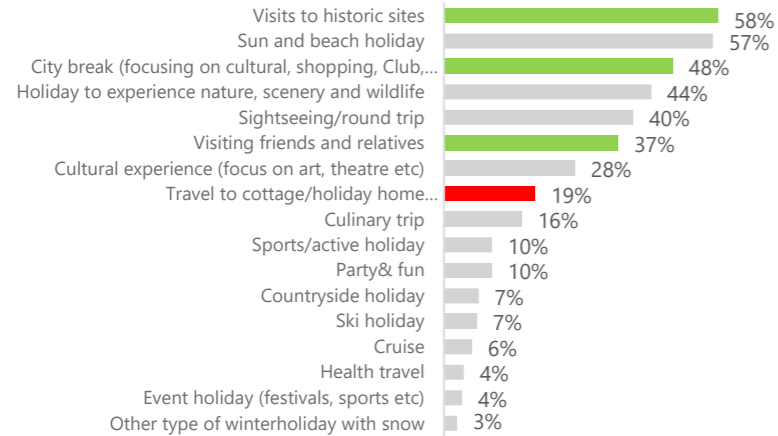
SEGMENT PROFILE – SOCIAL IMMERSION

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

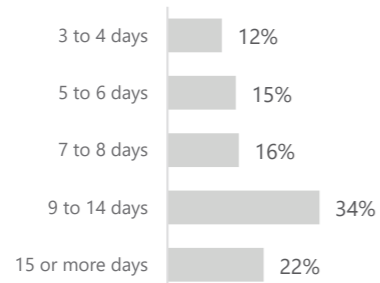
TYOLOGY



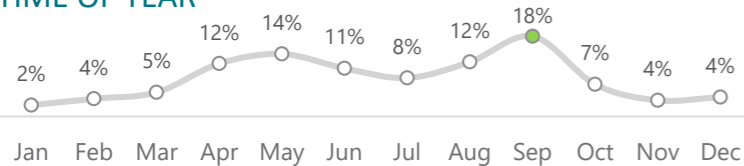
TYPE OF HOLIDAY



DURATION



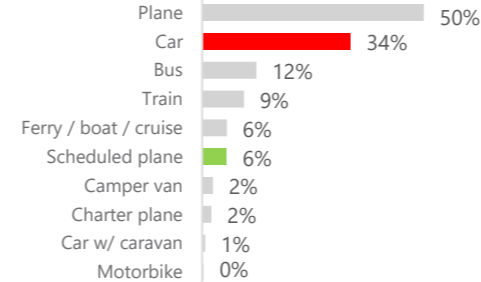
TIME OF YEAR



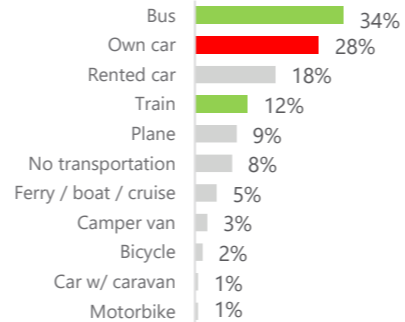
TRANSPORT AND ACOMMODATION



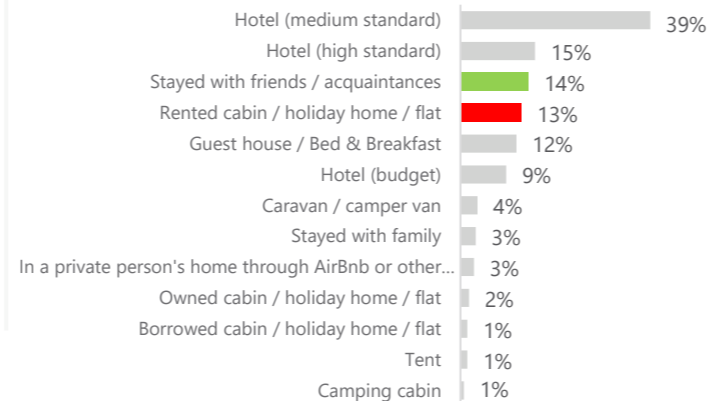
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



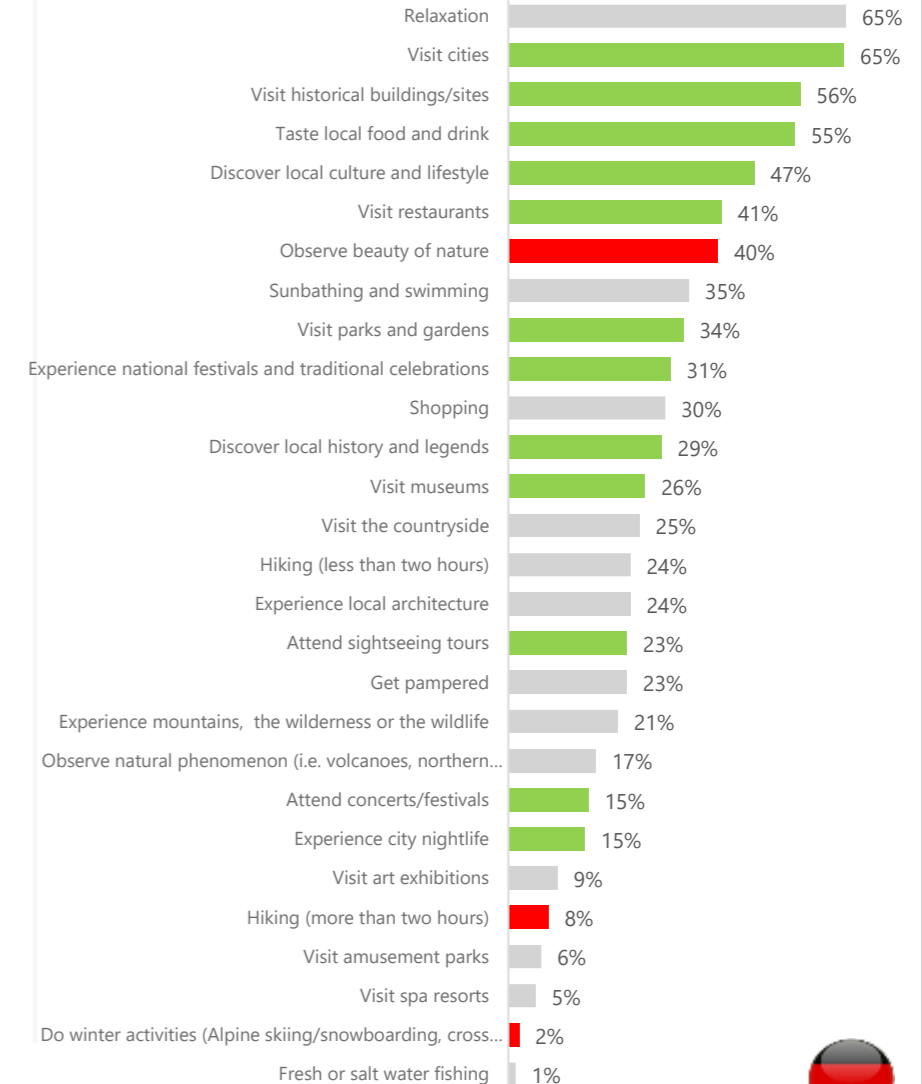
ACCOMMODATION



ACTIVITIES



ACTIVITIES



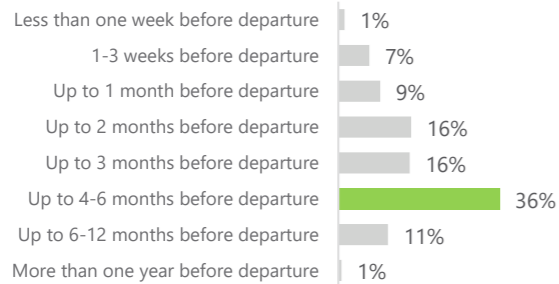
SEGMENT PROFILE - SOCIAL IMMERSION

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

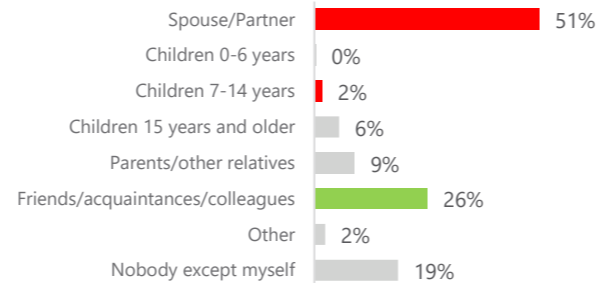
PLANNING



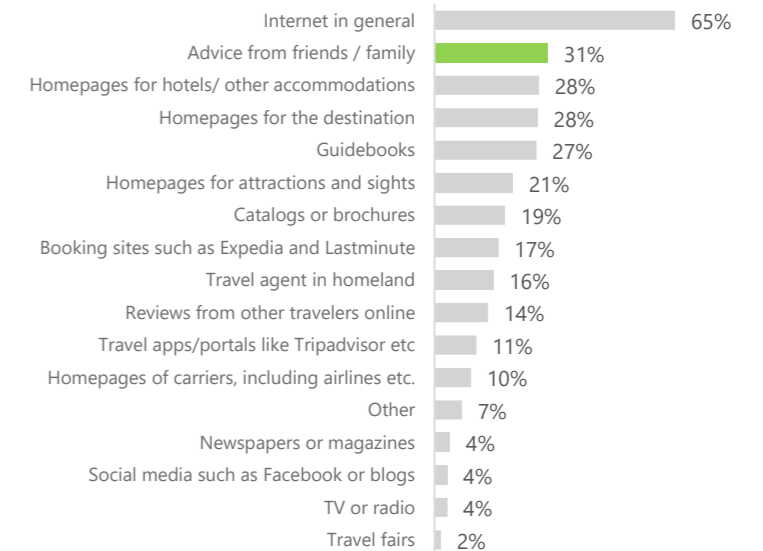
DECISION MADE



INFLUENCERS



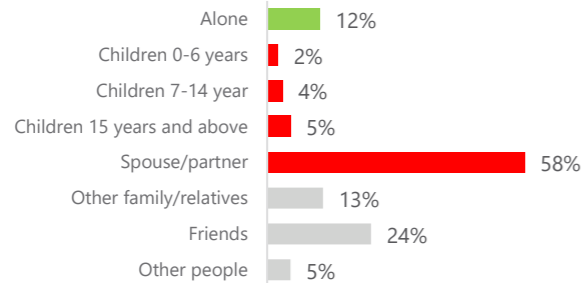
INFORMATION SOURCES



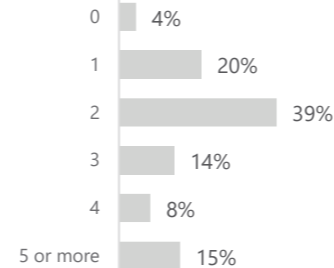
TRAVEL COMPANIONS



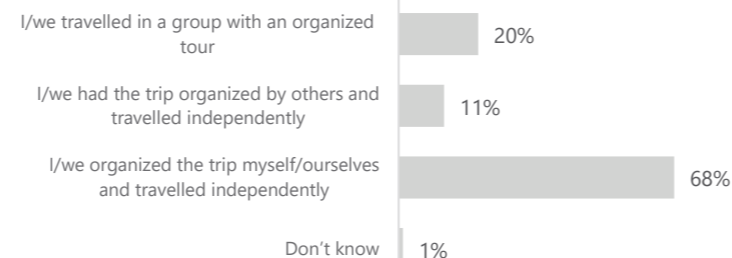
WHO DID YOU TRAVEL WITH



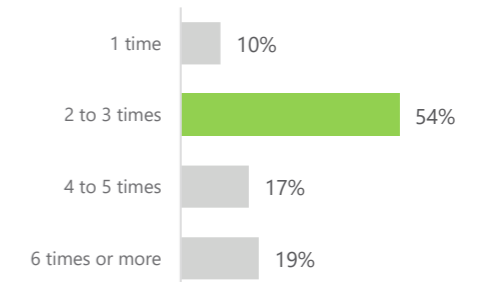
NUMBER OF TRAVEL COMPANIONS



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** as well as it allows me to pamper myself.

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 good beaches. It should have friendly people, good beaches, and a variety of different restaurant offers.

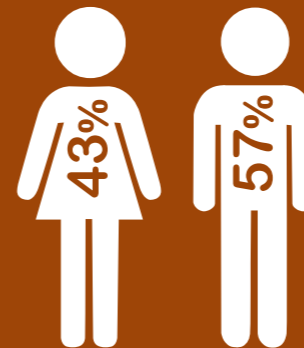
PERSONALITY; WHAT SHOULD IT STAND FOR?

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

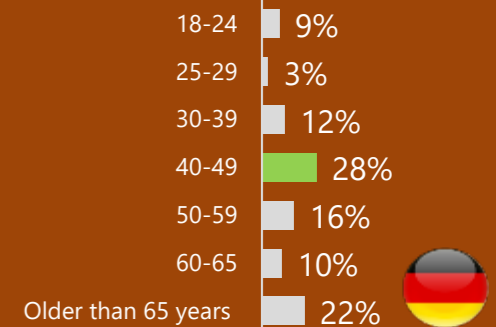
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

76%
ARE ABOVE
40 YEARS



SHARE OF
OVERNIGHT
STAYS
9%



SHARING AND CARING

TYPICAL HOLIDAY OCCASIONS

You will find the typical sun and beach vacation in this segment also, but you will find more holidays to **visit friends and relatives** and travels to **cottage/holiday homes** here than in other segments. For these consumer it's **all about family**.

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 taste **local food** and drinks and **observe the beauty of nature** as long as the activities are slow, warm and friendly. No pushing boundaries please!

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, cosy, friendly** and **relaxed**. They want to create those **precious moments of togetherness**.

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.

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.



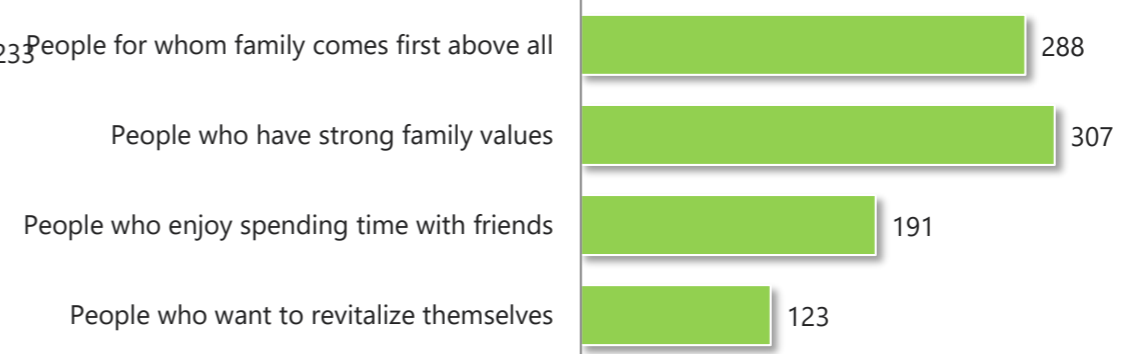
SHARING AND CARING

Core motivations

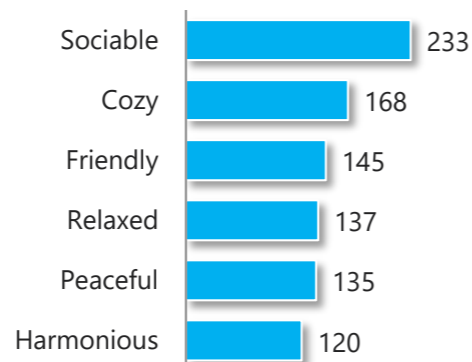
Emotional Benefits



Social Identity



Personality



Destination features



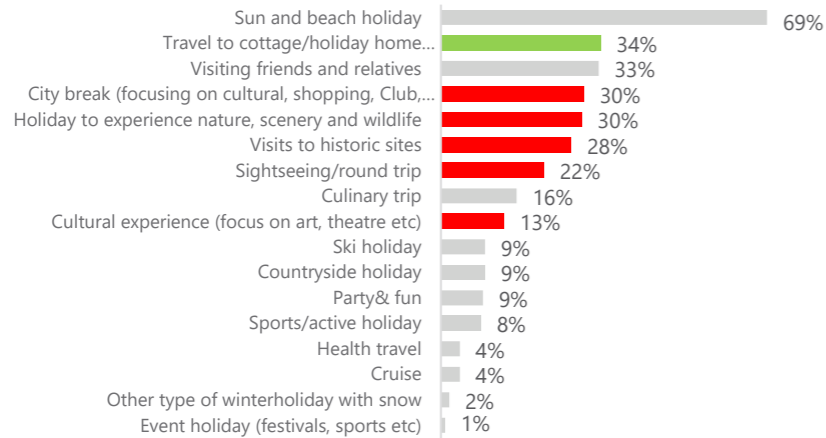
SEGMENT PROFILE – SHARING AND CARING

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

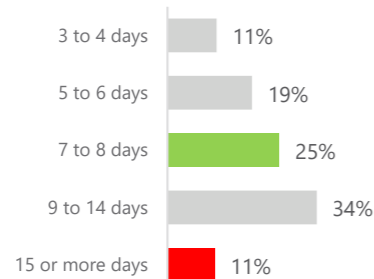
TYOLOGY



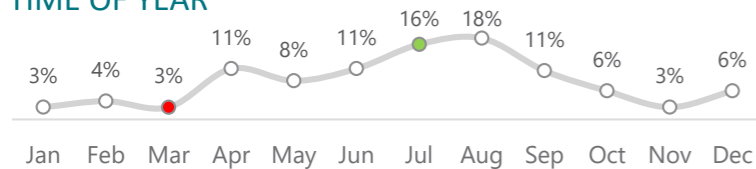
TYPE OF HOLIDAY



DURATION



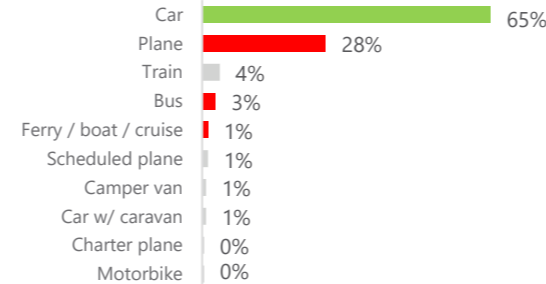
TIME OF YEAR



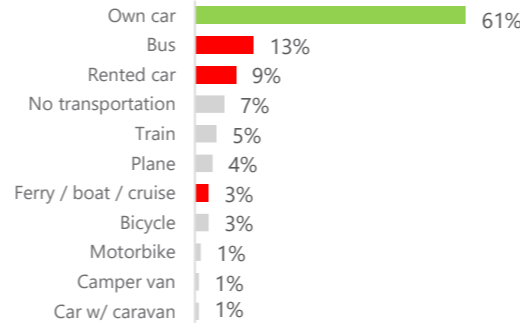
TRANSPORT AND ACOMMODATION



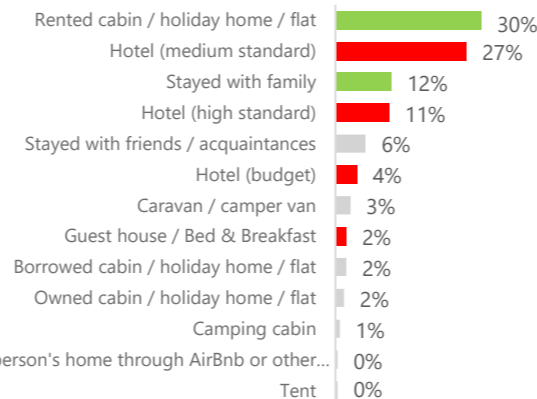
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



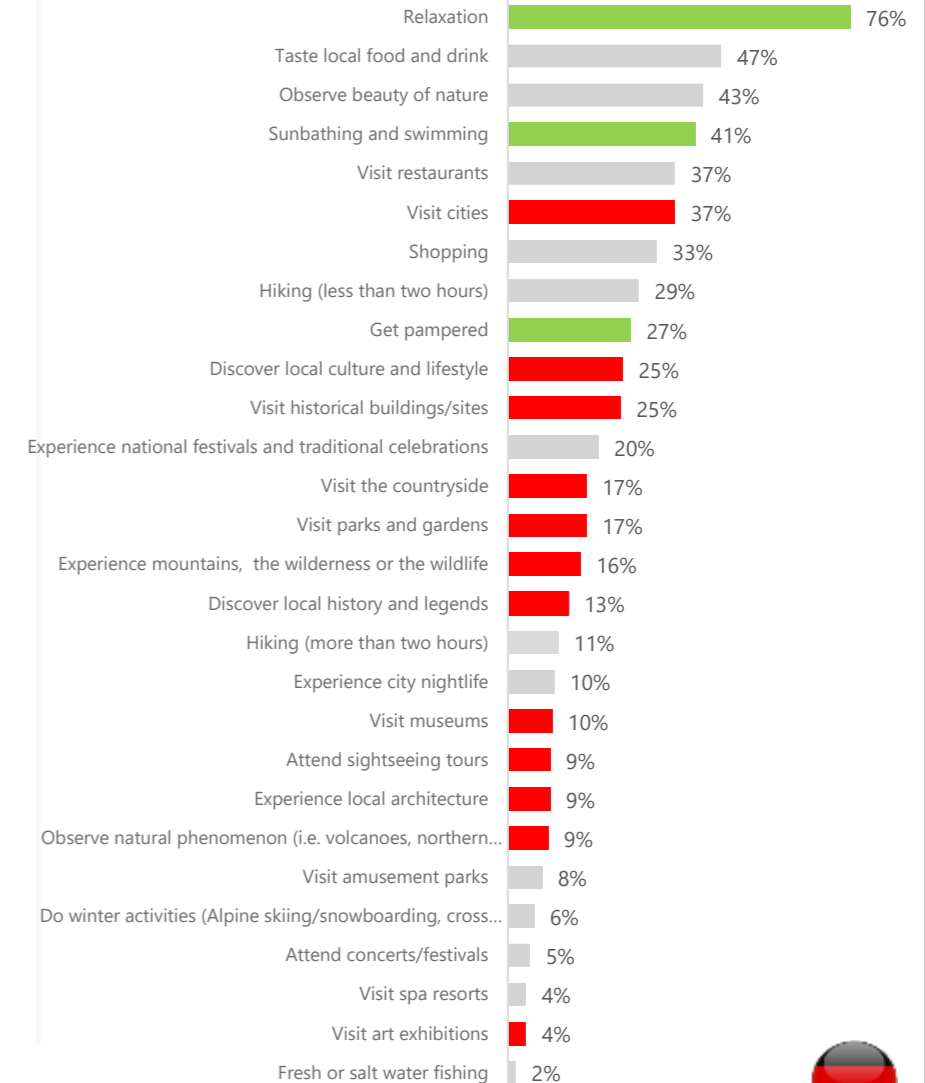
ACCOMMODATION



ACTIVITIES



ACTIVITIES



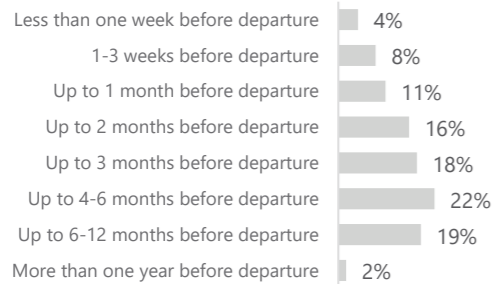
SEGMENT PROFILE - SHARING AND CARING

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

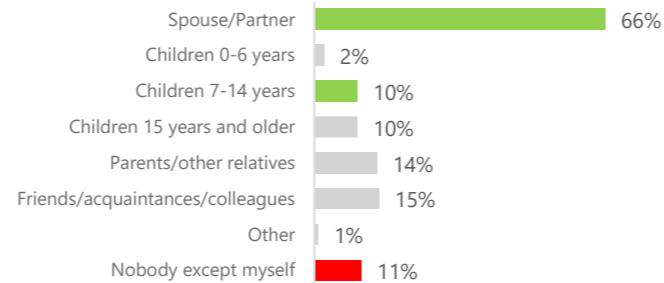
PLANNING



DECISION MADE



INFLUENCERS



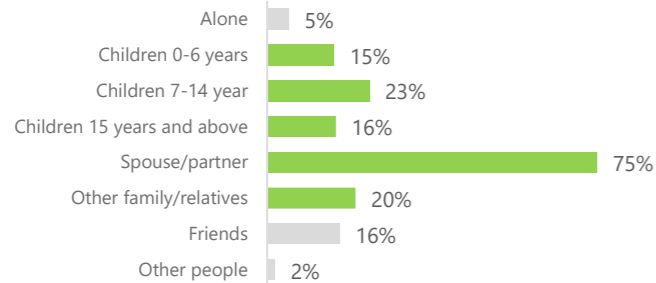
INFORMATION SOURCES



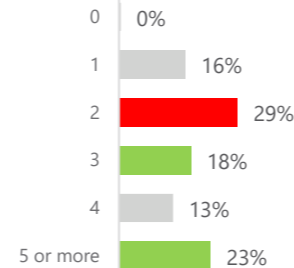
TRAVEL COMPANIONS



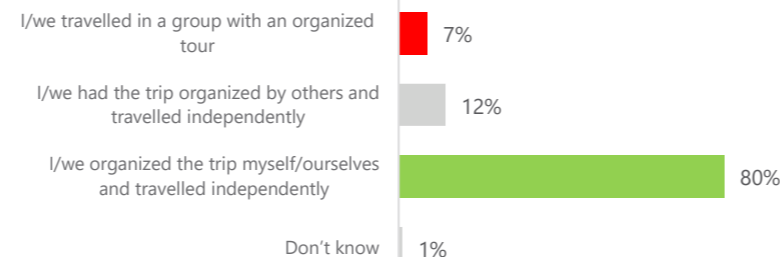
WHO DID YOU TRAVEL WITH



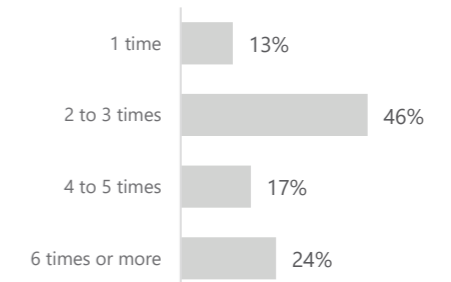
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)



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

ESCAPE

PEACEFUL AND
HARMONIOUS

RESTORE MY SENSE
OF HARMONY AND
BALANCE

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



ESCAPE

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

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

The core meaning of going on holiday is to **restore my sense of harmony** and balance. I need to escape from my hectic daily life, and **feel on top of the world**. I want to feel completely liberated, enjoy life to the fullest.

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**.

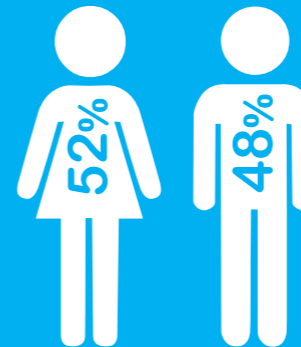
PERSONALITY; WHAT SHOULD IT STAND FOR?

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

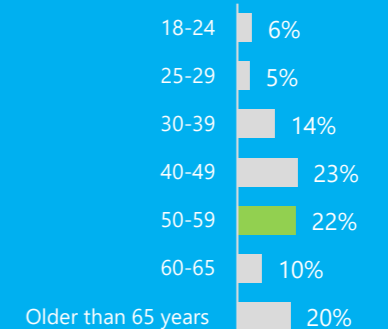
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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.

45%
ARE BETWEEN
40-59 YEARS



SHARE OF
OVERNIGHT
STAYS
21%



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** is also appreciated by this segment. They like to **visit the countryside**, do **hiking** and **experience mountains and the wilderness**. As long as the activities are in quiet environments **close to nature** we are in line with segment needs.

SOURCES OF INSPIRATIONS

Many of these consumers decide on the trip well ahead of departure. 49% of them settle for the trip **four months or more before** they go. They are not over indexing on any information source, and the internet in general is the largest point of inspiration.



ESCAPE

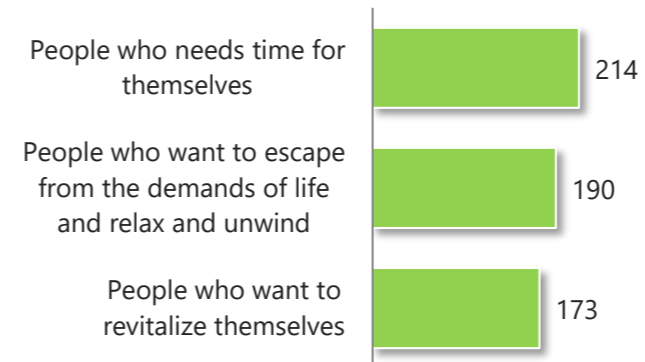
Core motivations



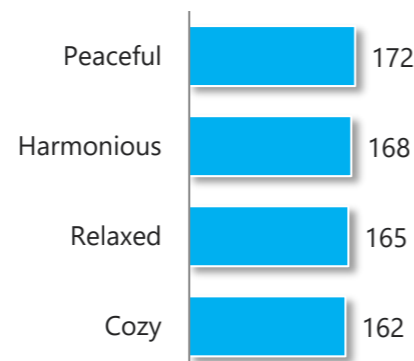
Emotional Benefits



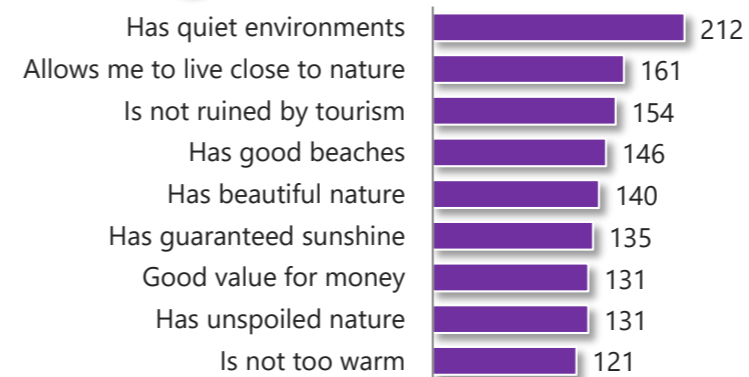
Social Identity



Personality



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



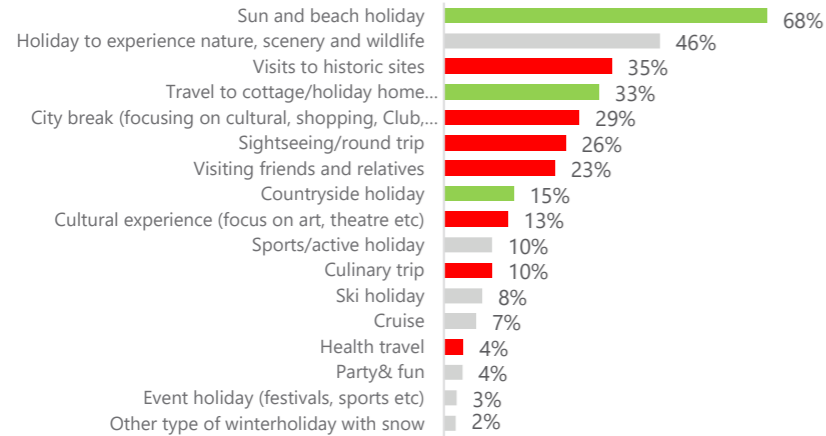
SEGMENT PROFILE – ESCAPE

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

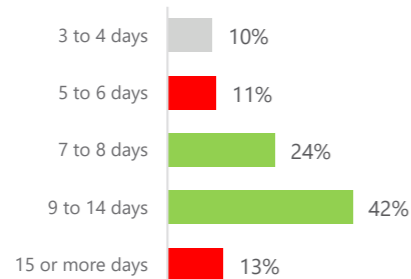
TYOLOGY



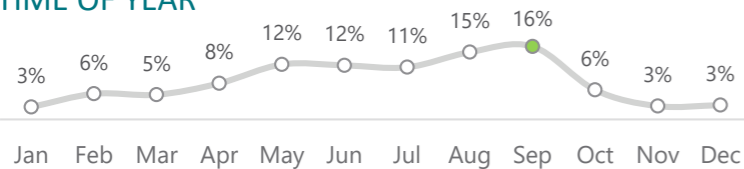
TYPE OF HOLIDAY



DURATION



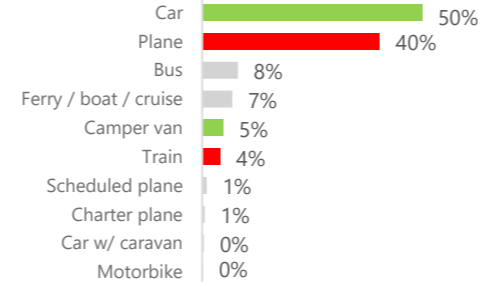
TIME OF YEAR



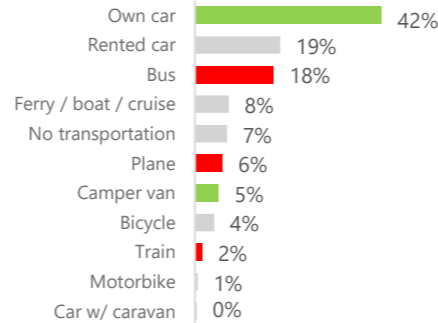
TRANSPORT AND ACOMMODATION



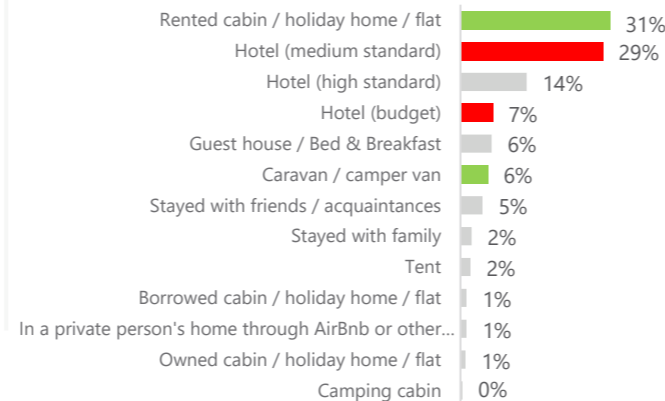
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



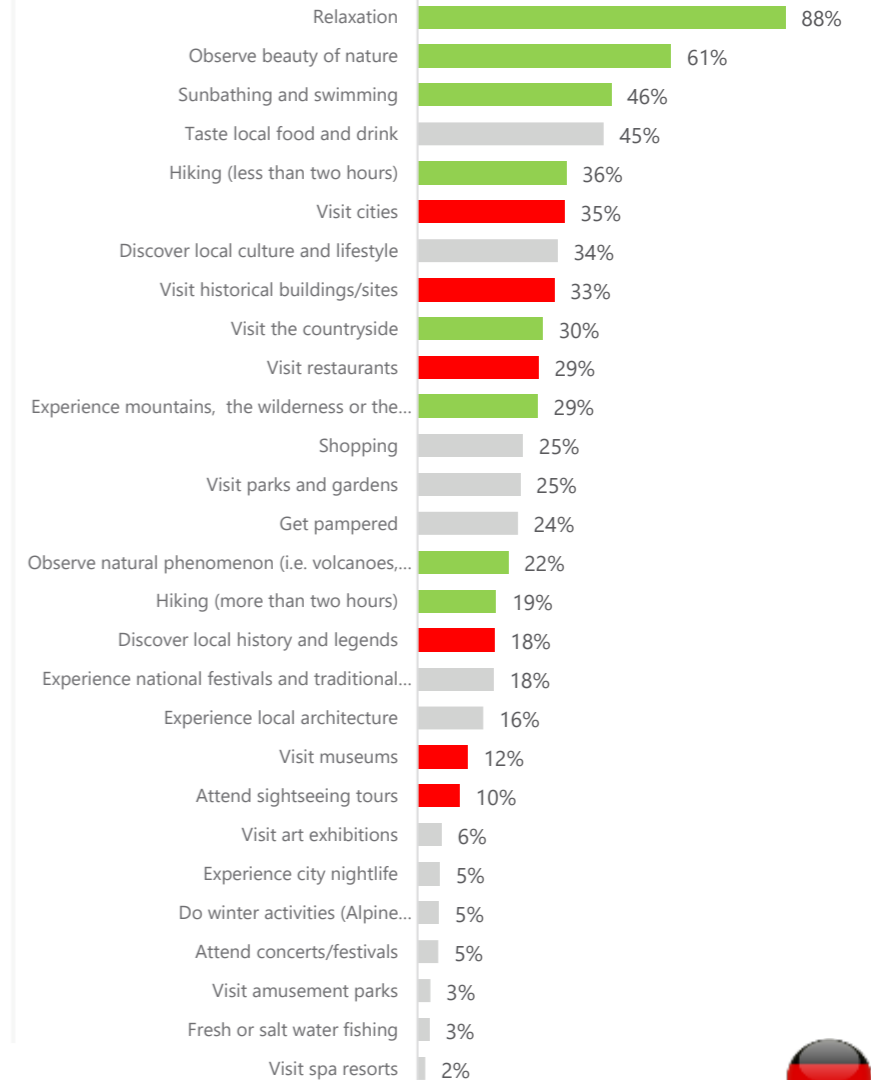
ACCOMMODATION



ACTIVITIES



ACTIVITIES



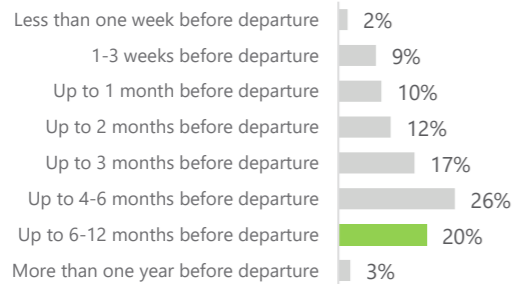
SEGMENT PROFILE - ESCAPE

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

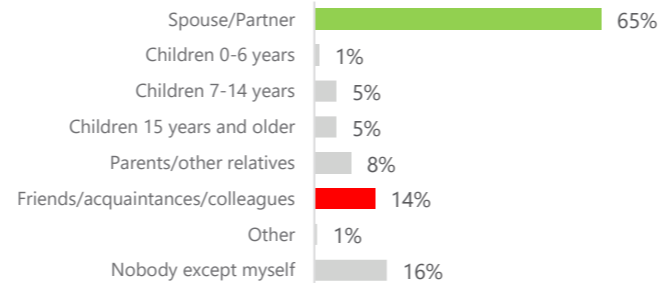
PLANNING



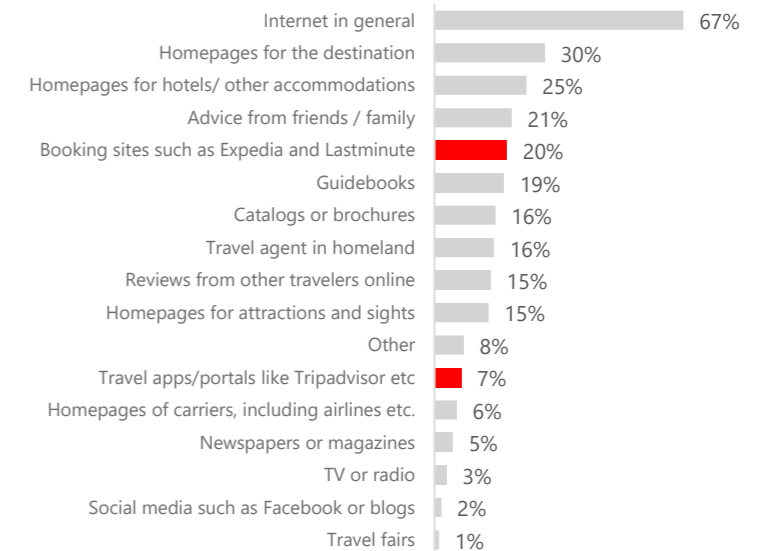
DECISION MADE



INFLUENCERS



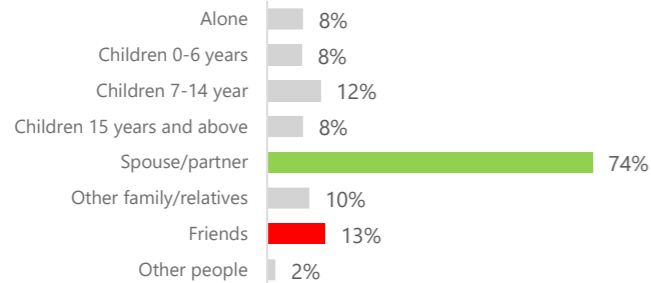
INFORMATION SOURCES



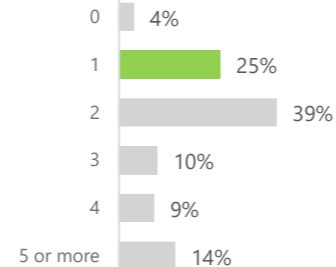
TRAVEL COMPANIONS



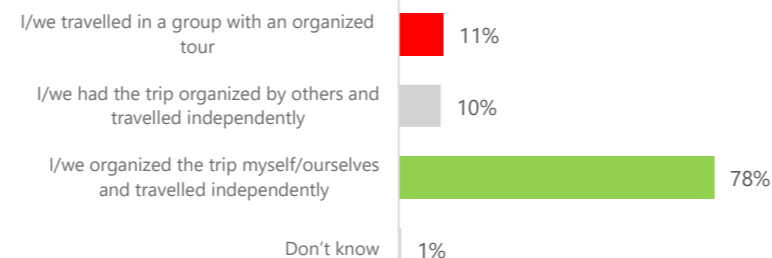
WHO DID YOU TRAVEL WITH



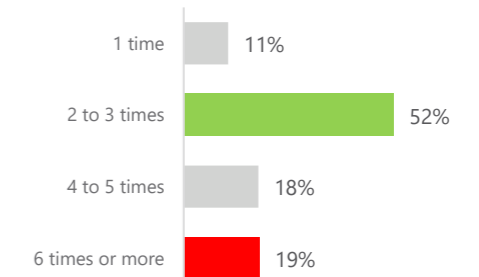
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)



CONTROL

PRACTICAL AND
PREDICTABLE

AVOID SURPRISES

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



CONTROL

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

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME ?

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

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that is **well organized** and **not too warm**. Good **service** is important to me. It has to have **few language barriers**.

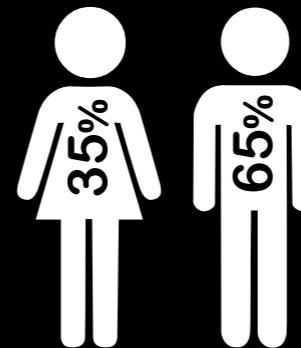
PERSONALITY; WHAT SHOULD IT STAND FOR?

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

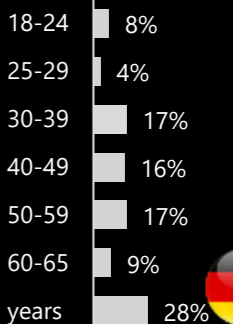
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

The destination should be for people who make **rational choices**. People who prefer the **familiar** over the unknown. Basically people who **avoid risk**.

51%
ARE BETWEEN
30-59 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 **holidays to experience nature, scenery and wildlife** and **city breaks** among the most popular holiday types in this segment.

HOLIDAY EXPERIENCE

Relaxation is on top of the list. This segment is under indexing on many activities, so a **less active segment**. They would like to visit cities, have restaurant meals and go shopping.

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!

SOURCES OF INSPIRATIONS

These consumers **travel with children** so they are highly influenced by their **spouse** and their **children**. Most have **organized the trip themselves and travelled independently** (67%). They do not use that many information sources because the **go to a place they know**.

THE ROLE OF BRANDS

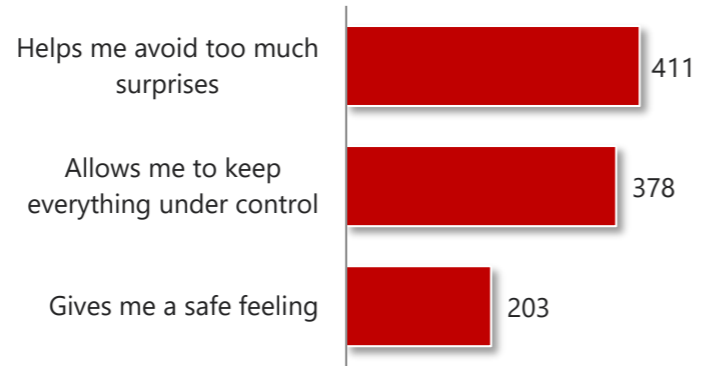
Control plays an important role for brands if they are aimed at **structuring people's lives** or when the focus is on risk management, simplifying life, avoiding surprises. Brands that want to position themselves on Control should offer **rational arguments** and focus on **functionality**, maturity,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



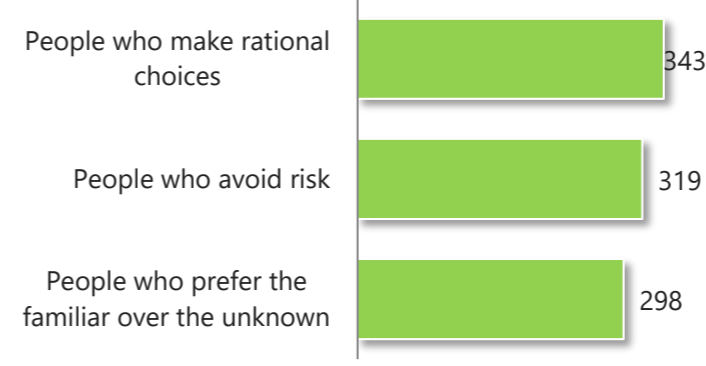
CONTROL

Core motivations

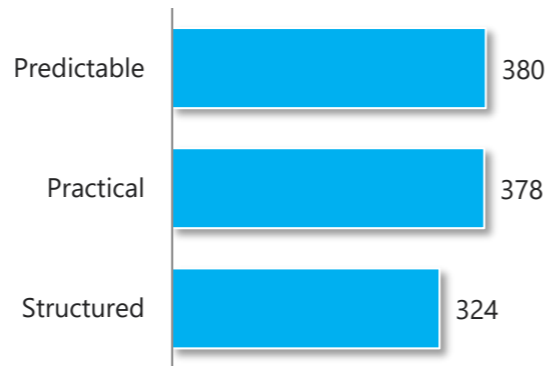
Emotional Benefits



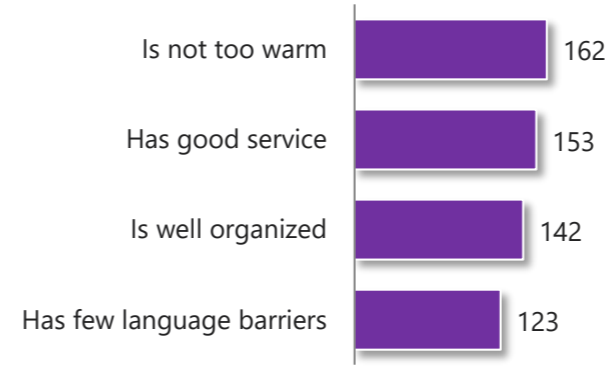
Social Identity



Personality



Destination features



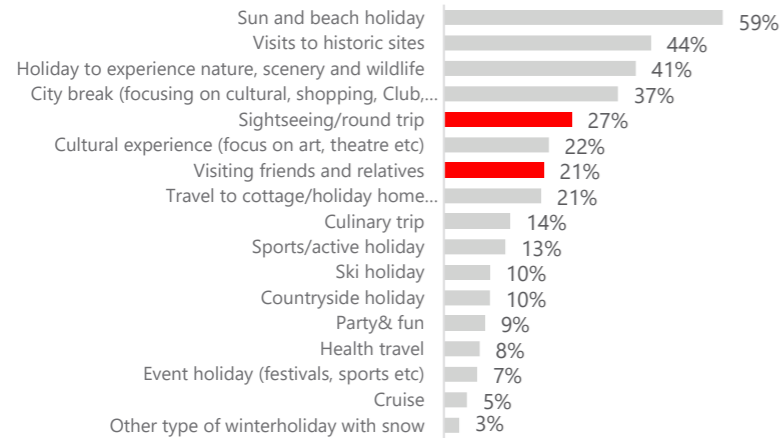
SEGMENT PROFILE – CONTROL

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

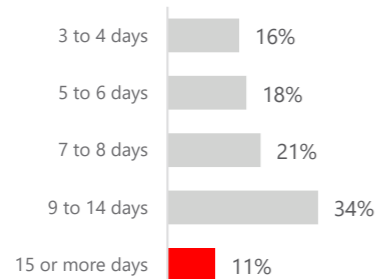
TYOLOGY



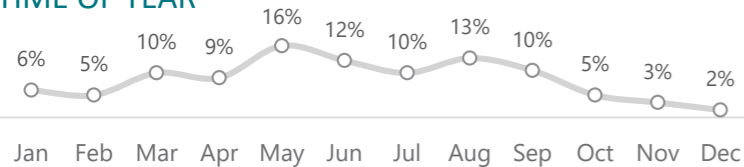
TYPE OF HOLIDAY



DURATION



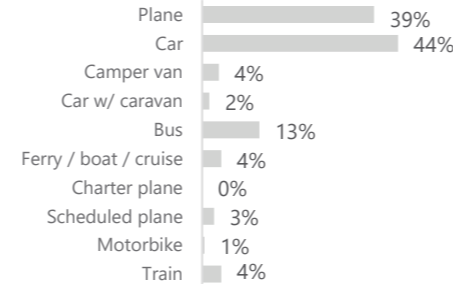
TIME OF YEAR



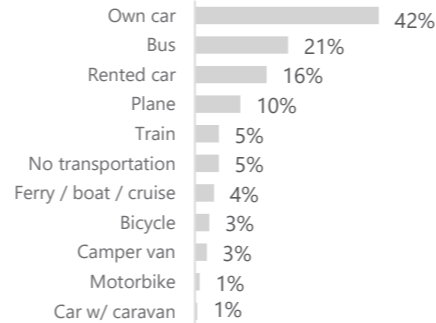
TRANSPORT AND ACOMMODATION



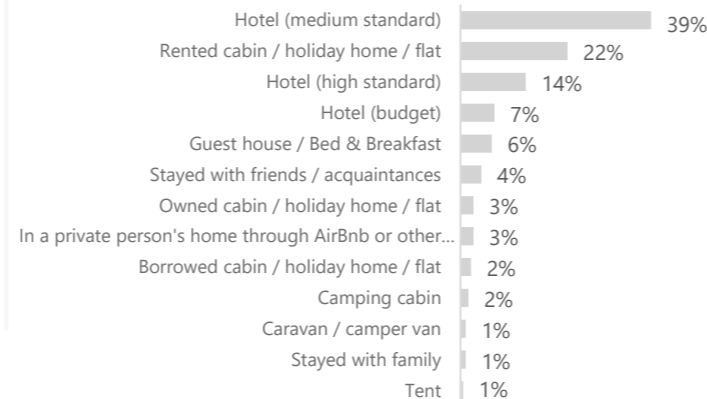
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



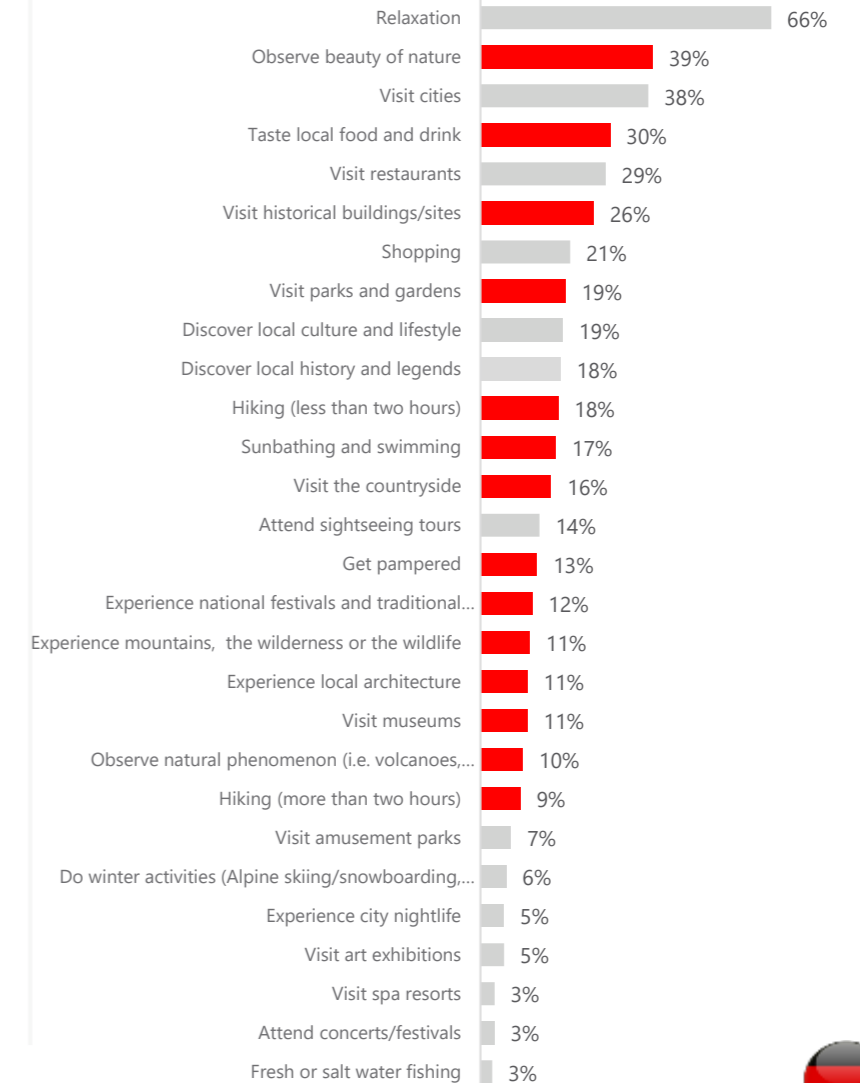
ACCOMMODATION



ACTIVITIES



ACTIVITIES



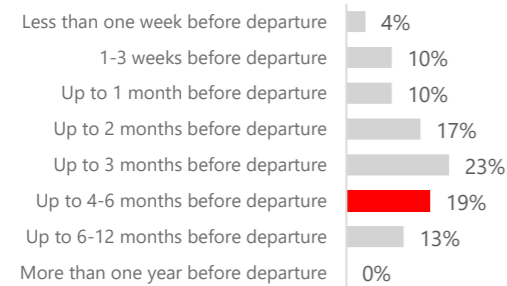
SEGMENT PROFILE - CONTROL

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

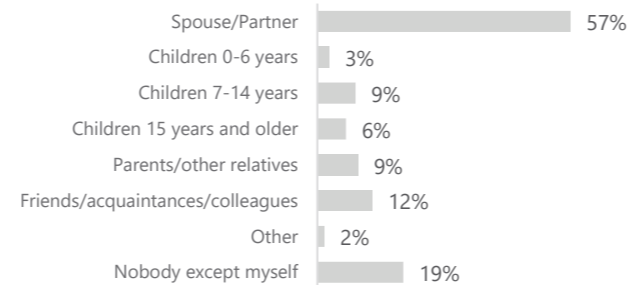
PLANNING



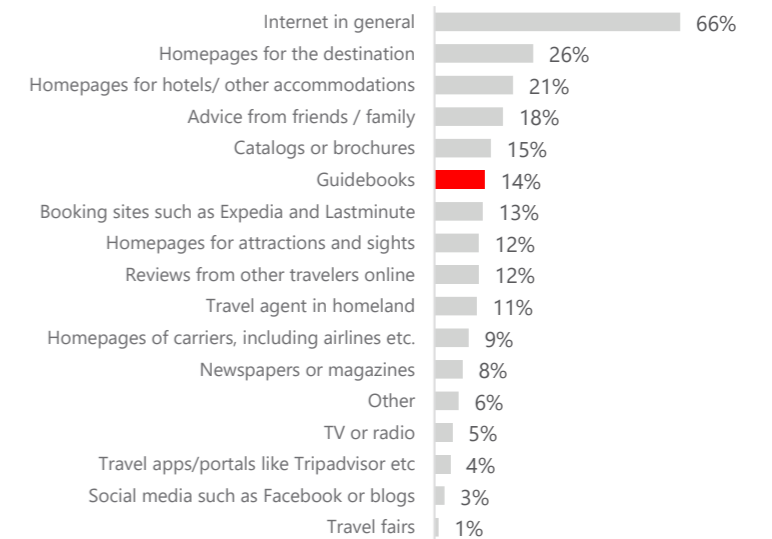
DECISION MADE



INFLUENCERS



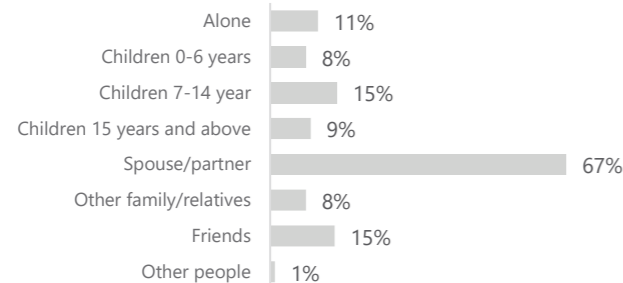
INFORMATION SOURCES



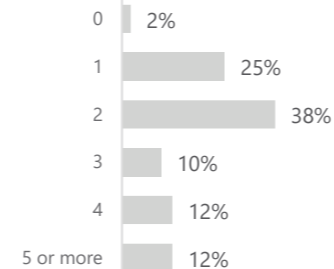
TRAVEL COMPANIONS



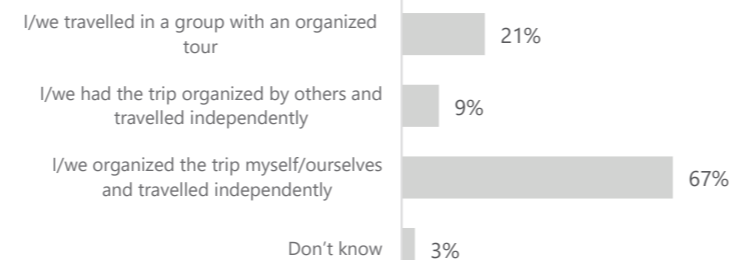
WHO DID YOU TRAVEL WITH



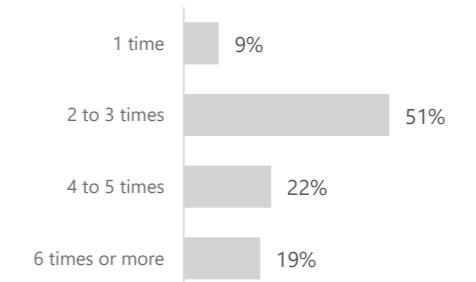
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





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 different restaurant offers and be easy to travel to and around.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

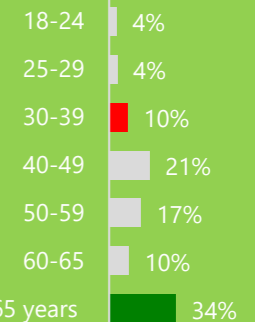
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

44%
ARE ABOVE
60 YEARS



SHARE OF
OVERNIGHT
STAYS
9%



BROADENING MY CULTURAL HORIZON

TYPICAL HOLIDAY OCCASIONS

The dominant types of holiday is visits to **historic sites**, **city break** (cultural, shopping, Club, restaurant visits etc.), **Sightseeing/roundtrip**, **cultural experience** (focus on art, theatre etc.), and **cruise**.

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** and **interesting culture & art**. 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 **art exhibitions** and at **concerts/festivals**.

SOURCES OF INSPIRATIONS

These consumers are, more than others inspired by **guidebooks** and **homepages for the destination**, **homepages for attractions and sites** and **catalogues** or brochures.



BROADENING MY CULTURAL HORIZON

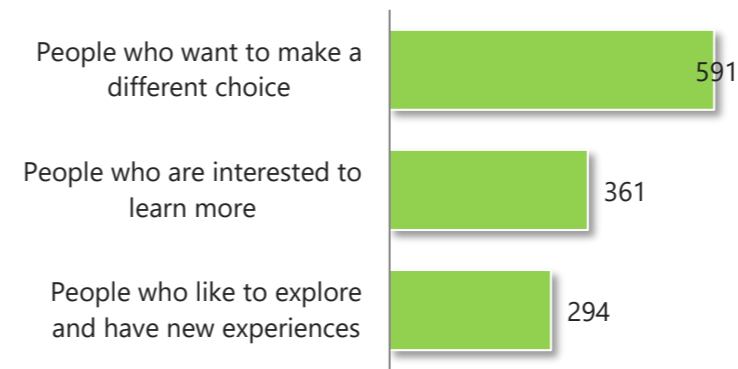
Core motivations



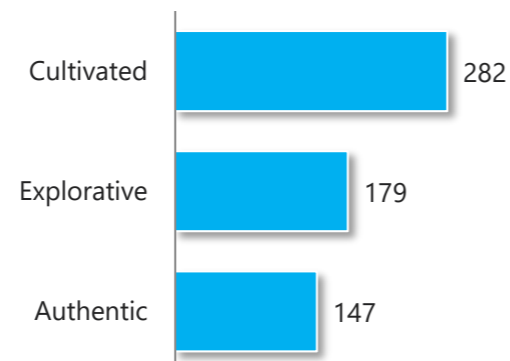
Emotional Benefits



Social Identity



Personality



Destination features



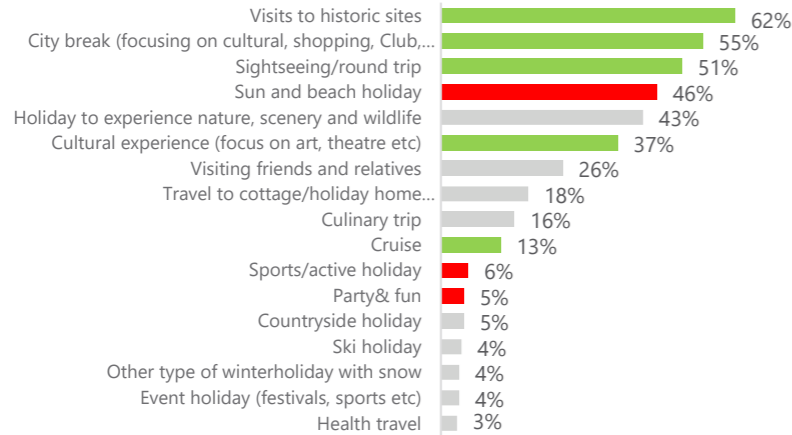
SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

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

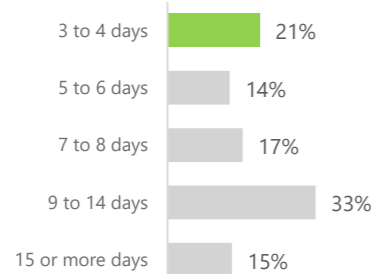
TYOLOGY



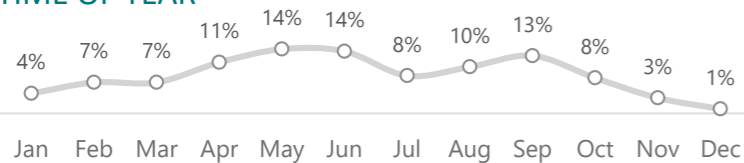
TYPE OF HOLIDAY



DURATION



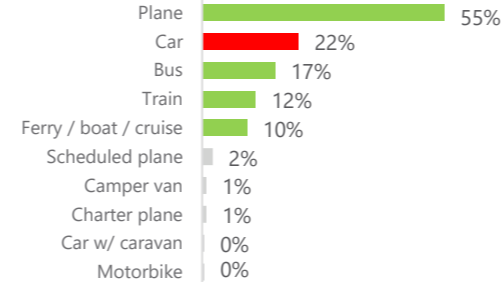
TIME OF YEAR



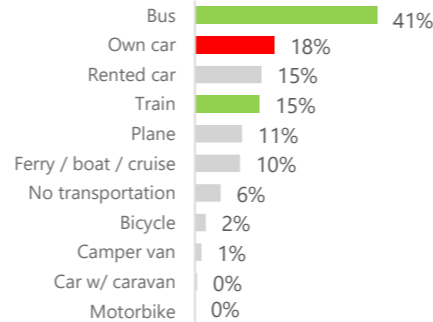
TRANSPORT AND ACOMMODATION



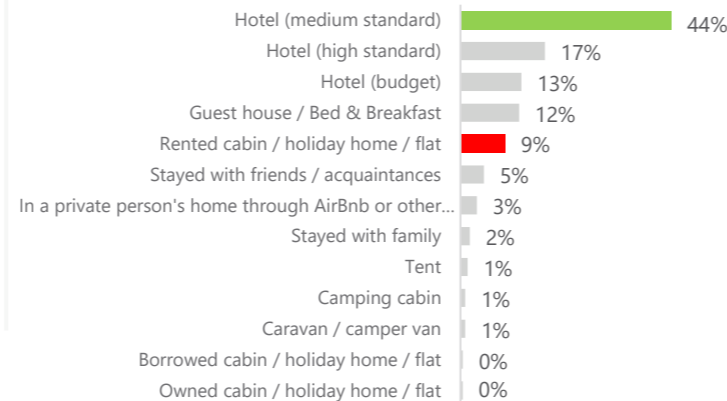
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



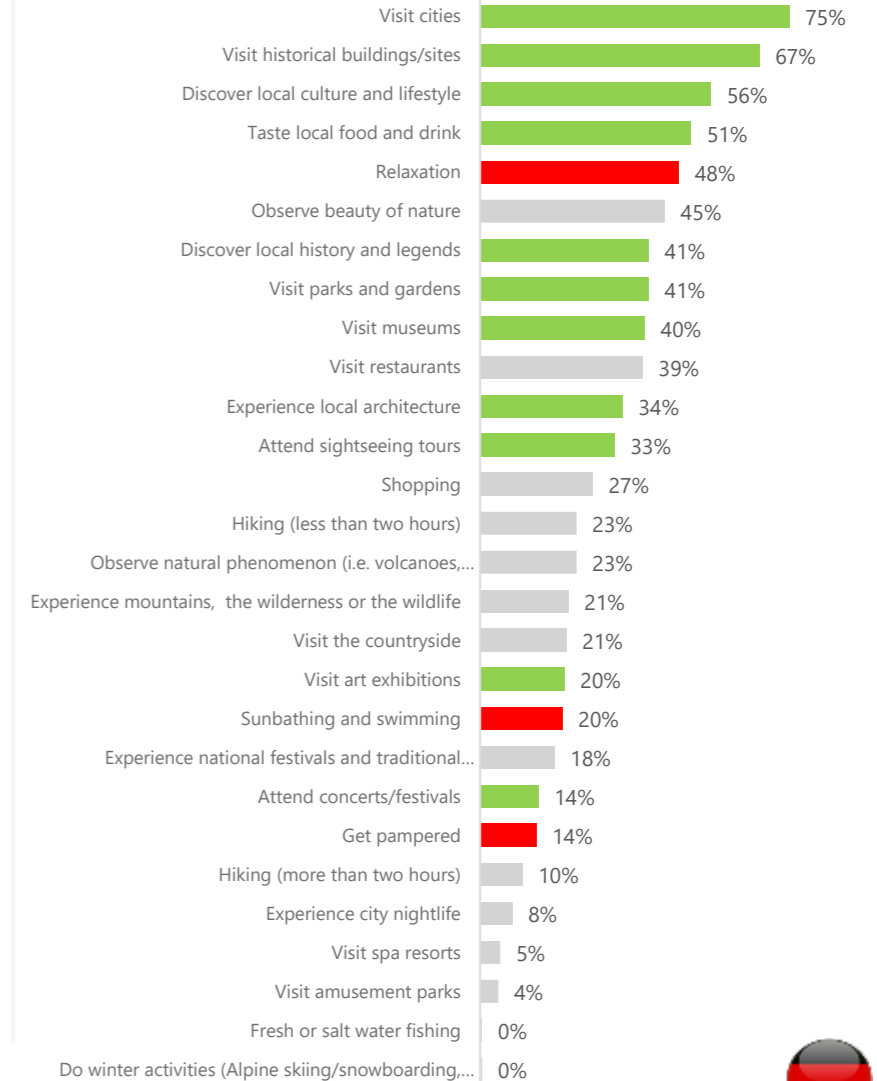
ACCOMMODATION



ACTIVITIES



ACTIVITIES



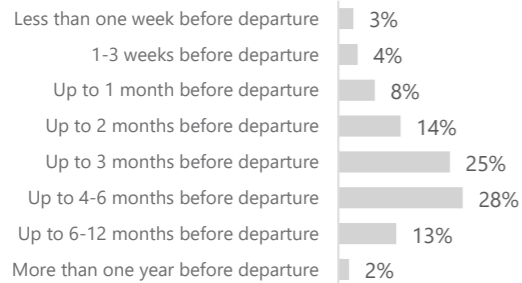
SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

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

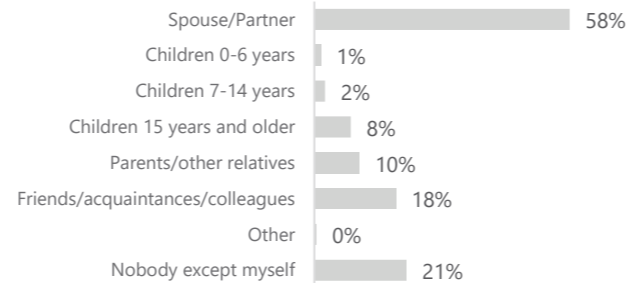
PLANNING



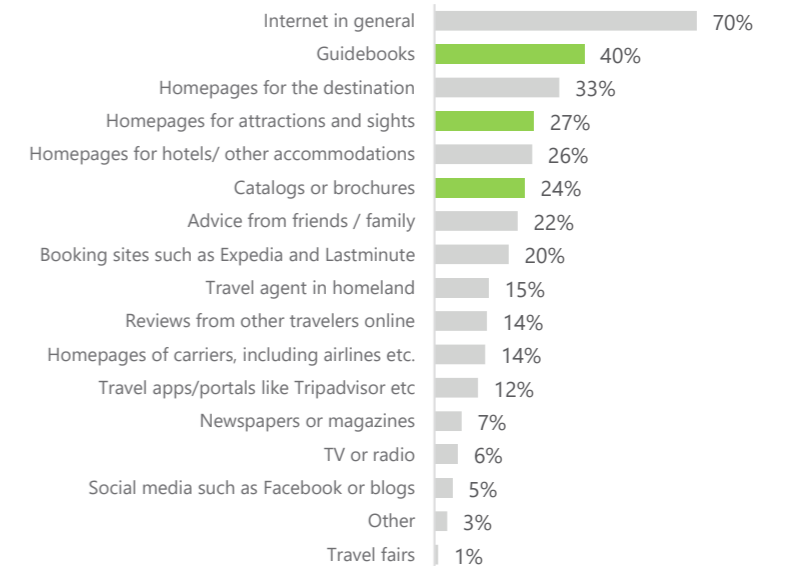
DECISION MADE



INFLUENCERS



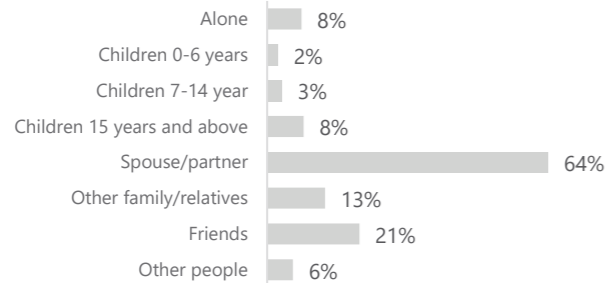
INFORMATION SOURCES



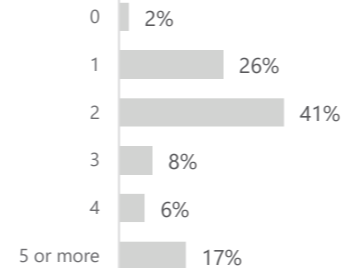
TRAVEL COMPANIONS



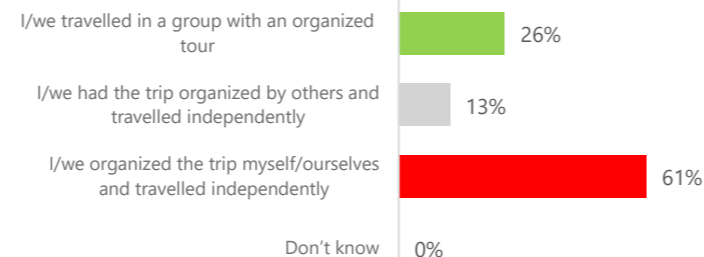
WHO DID YOU TRAVEL WITH



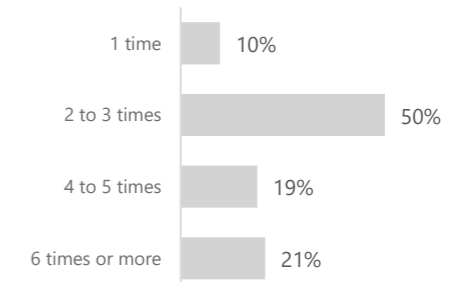
NUMBER OF TRAVEL COMPANIONS



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 **enrich my view of the world** and **give me rich experiences** which allows me **to broaden my horizon** and **knowledge**. 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 with **unspoiled nature** that is **not ruined by tourism** which allows me to **live close to nature**. A destination that has good opportunities to **meet local people** and also **interesting sights**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

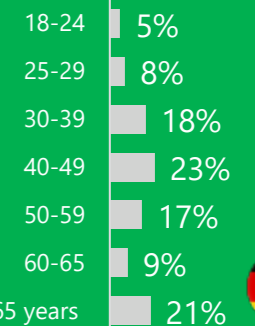
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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

58%
ARE BETWEEN
30-59 YEARS



SHARE OF
OVERNIGHT
STAYS
14%



ADVENTURES IN THE WORLD OF NATURAL BEAUTY

TYPICAL HOLIDAY OCCASIONS

The most common holiday type is a holiday to **experience nature, scenery and wildlife**, visits to **historic sites** and **sightseeing/roundtrips**. They are also over indexing on **cultural experiences** and **sport/active holiday**.

I TRAVEL TO SOMETHING UNIQUE

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

THE ROLE OF BRANDS

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

HOLIDAY EXPERIENCE

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 **local architecture** and visit museums.

SOURCES OF INSPIRATIONS

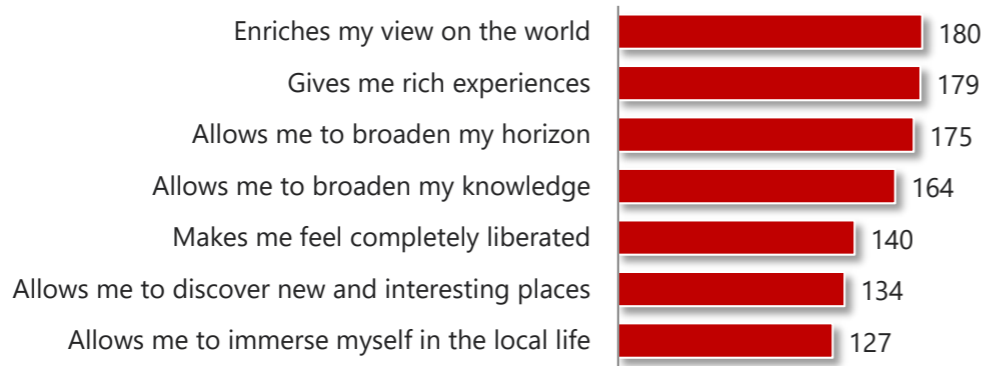
This segment seek their information in the **internet** for the destination, carriers and attractions and sights. They also use **guidebooks** and **homepages for the destination and attraction and sites**. **Catalogues** or **brochures** are also popular.



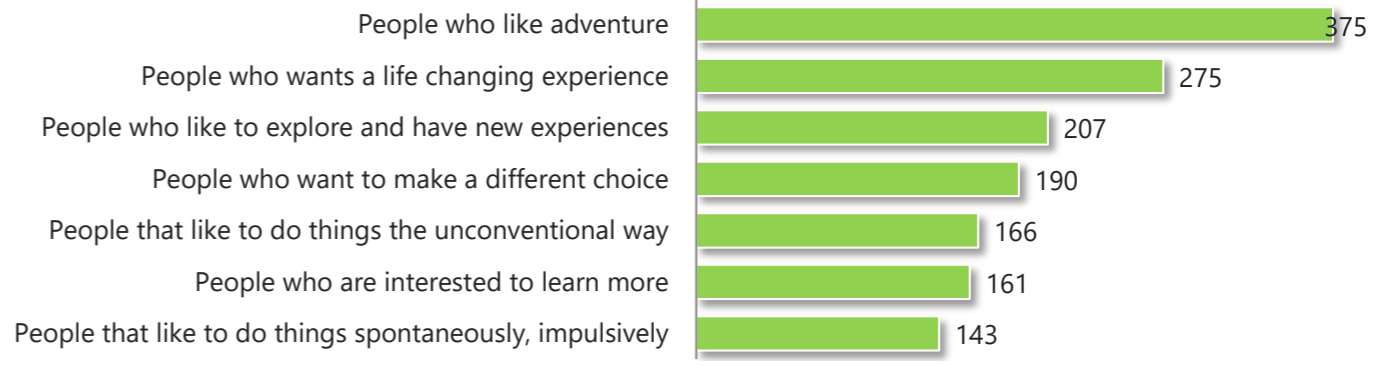
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Core motivations

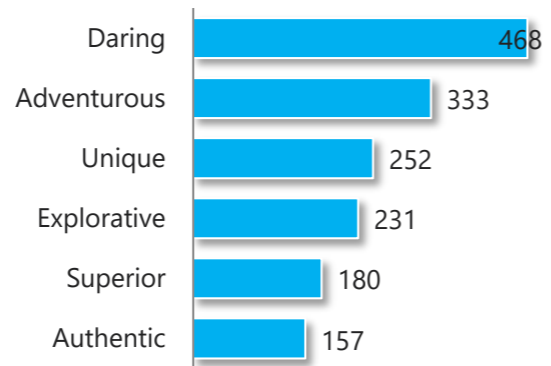
Emotional Benefits



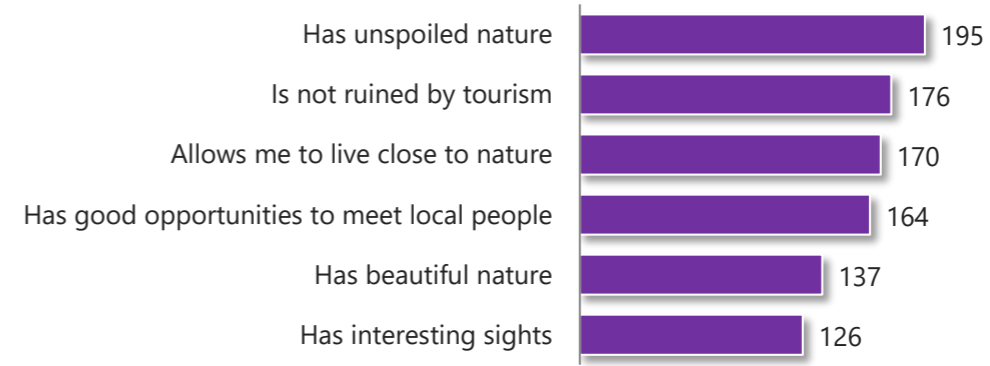
Social Identity



Personality



Destination features



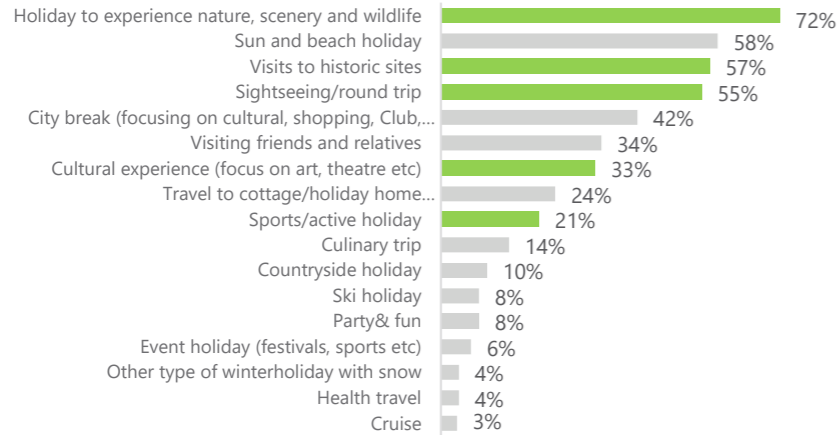
SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

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

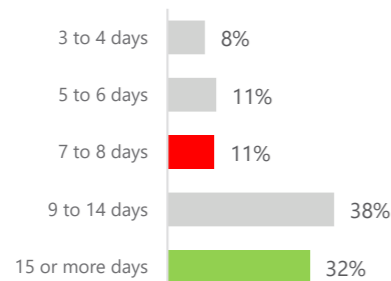
TYOLOGY



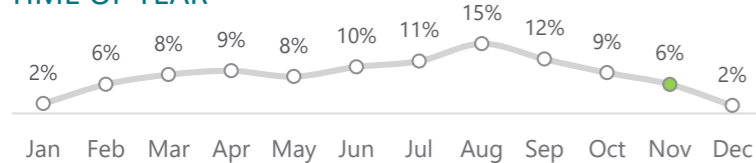
TYPE OF HOLIDAY



DURATION



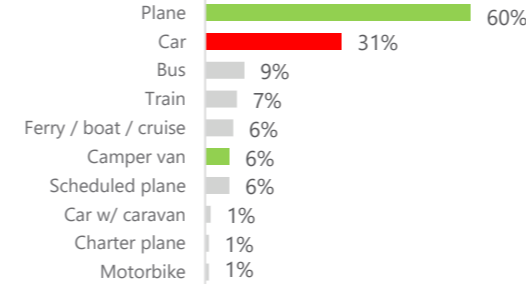
TIME OF YEAR



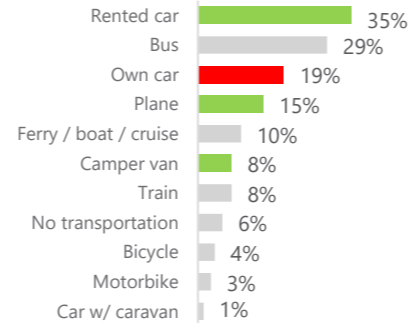
TRANSPORT AND ACOMMODATION



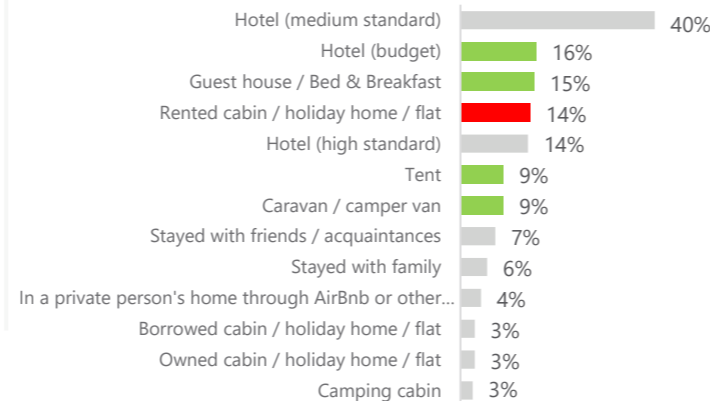
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



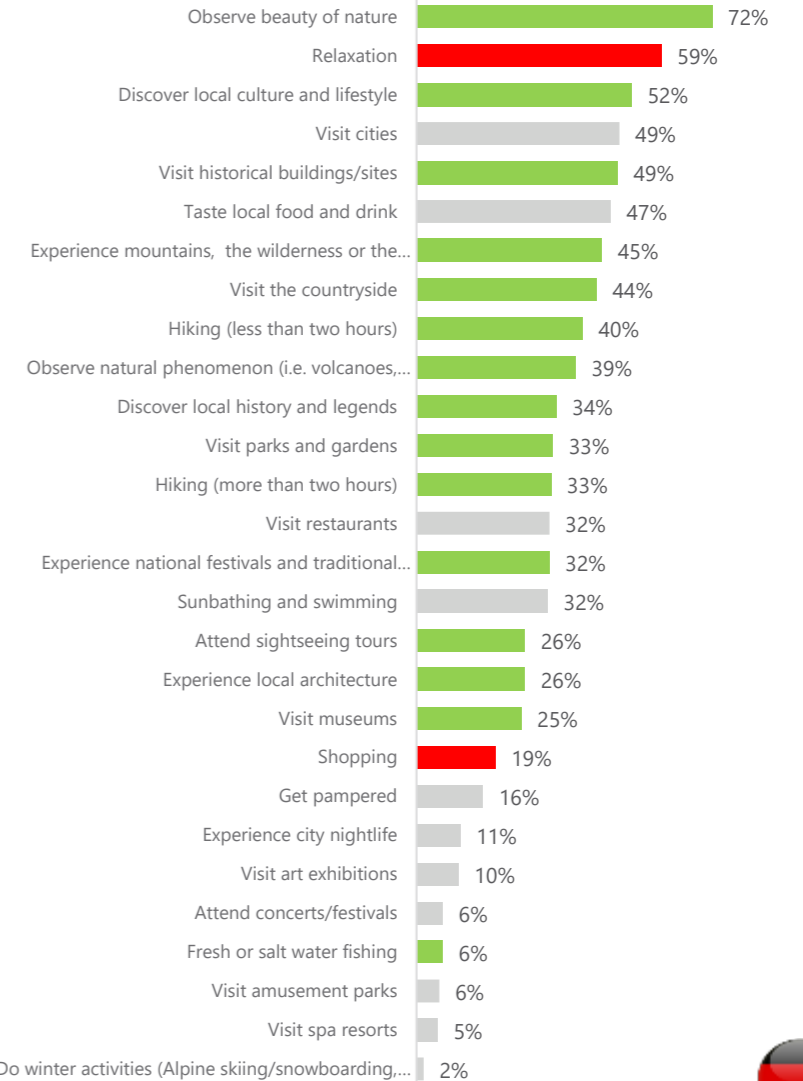
ACCOMMODATION



ACTIVITIES



ACTIVITIES



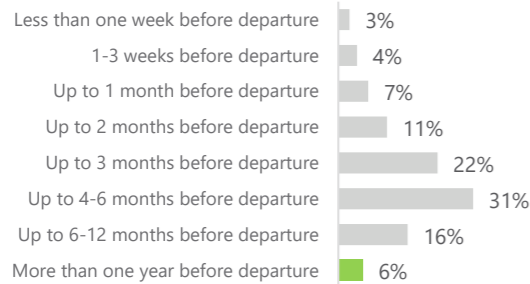
SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY

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■ Significantly under indexed in segment

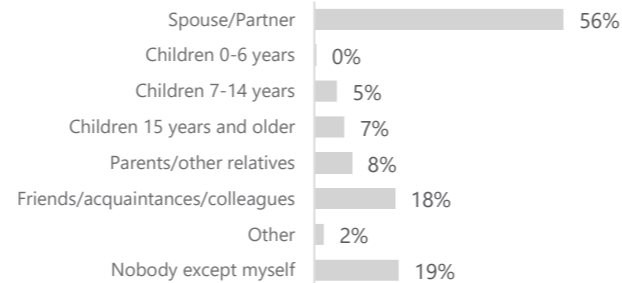
PLANNING



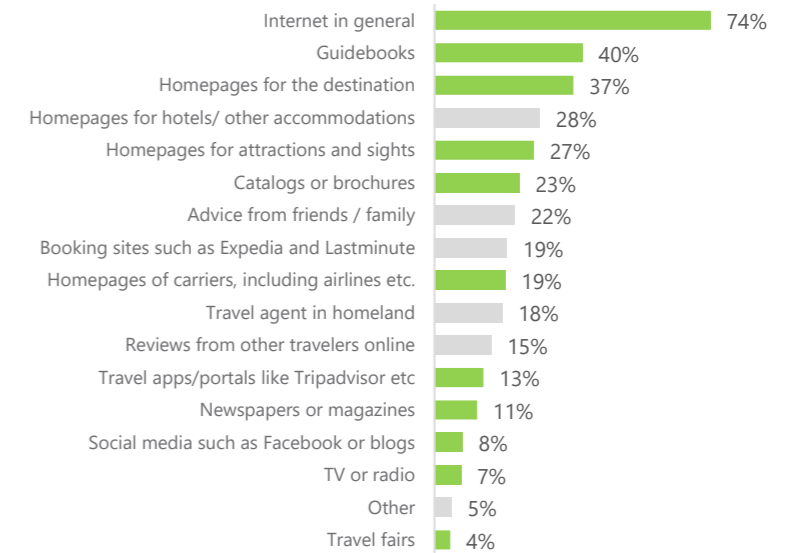
DECISION MADE



INFLUENCERS



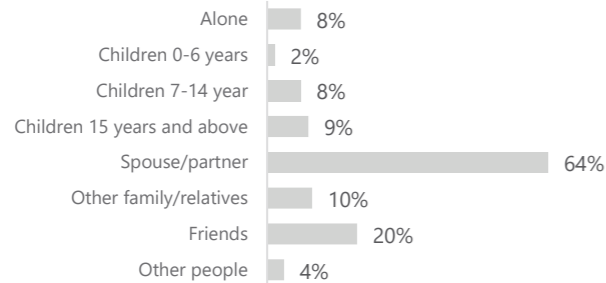
INFORMATION SOURCES



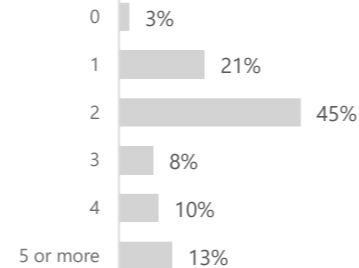
TRAVEL COMPANIONS



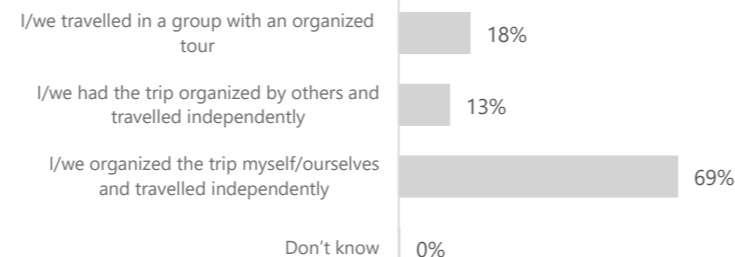
WHO DID YOU TRAVEL WITH



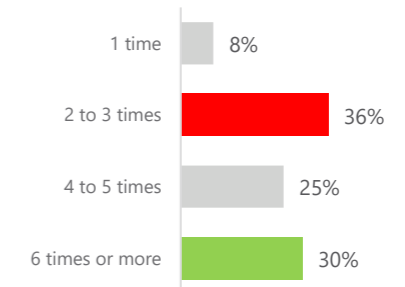
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





EXTRAVAGANT INDULGENCE

EXTRAVAGANT
AND SUPERIOR

SOPHISTICATED
AND CLASSY

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



EXTRAVAGANT INDULGENCE

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

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?

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

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?

I want to go to a place that has **lots of organized trips and excursions**. Good **shopping** and good **service** is important. I want a destination that is well **organized**. Of course it needs to have a variety of **accommodations and restaurant offers**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

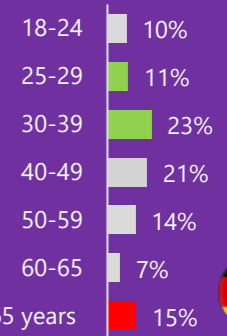
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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**.

43%
ARE BELOW
40 YEARS



SHARE OF
OVERNIGHT
STAYS
10%



EXTRAVAGANT INDULGENCE

TYPICAL HOLIDAY OCCASIONS

You will find most of the typical **sun and beach** vacations in this segment, but you will also find **ski holidays** and other type of **winter holidays** and even **event holidays**. 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 winter. They often travel on **organized tours** or have **others plan for them** and **travel independently**.

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 over index on **spa resorts** and visits to **amusements parks**. 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 **spend a bit of time planning**. 45% of them settle for the trip **between 3-6 months** before they go. They get inspired by articles in **newspapers** or **magazines**. They also browse the internet in general to get luxurious romantic inspiration. They travel with their **partner** and gets inspired by him or her.



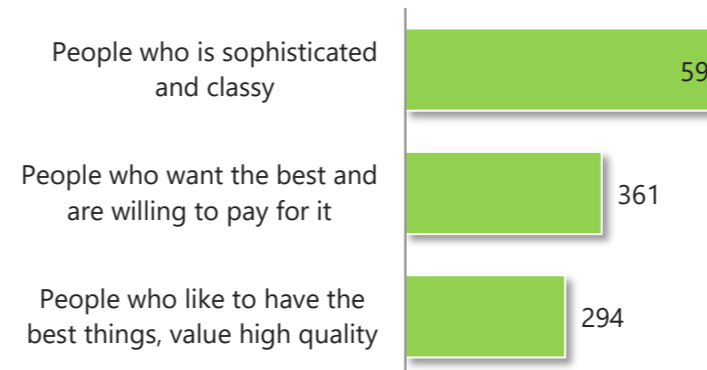
EXTRAVAGANT INDULGENCE

Core motivations

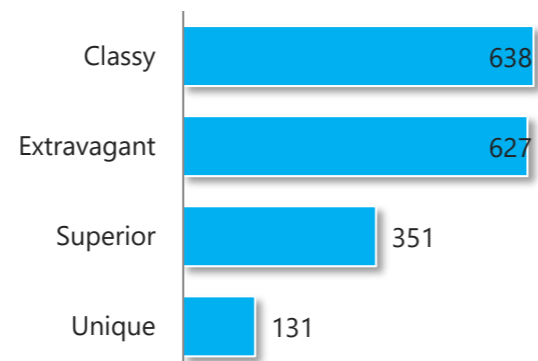
Emotional Benefits



Social Identity



Personality



Destination features



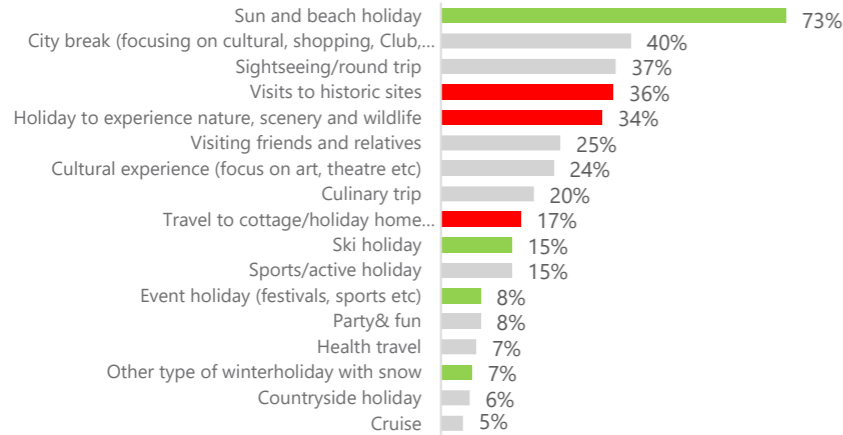
SEGMENT PROFILE – EXTRAVAGANT INDULGENCE

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

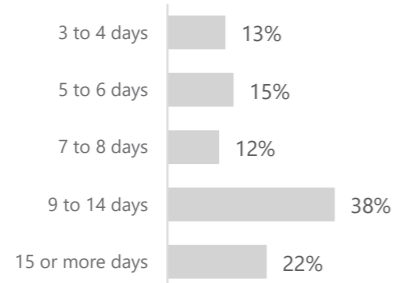
TYOLOGY



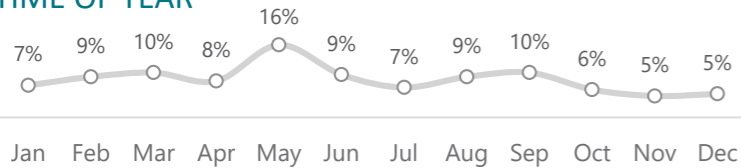
TYPE OF HOLIDAY



DURATION



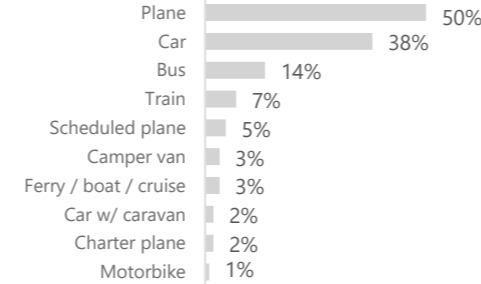
TIME OF YEAR



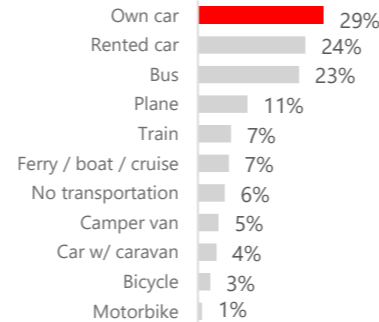
TRANSPORT AND ACOMMODATION



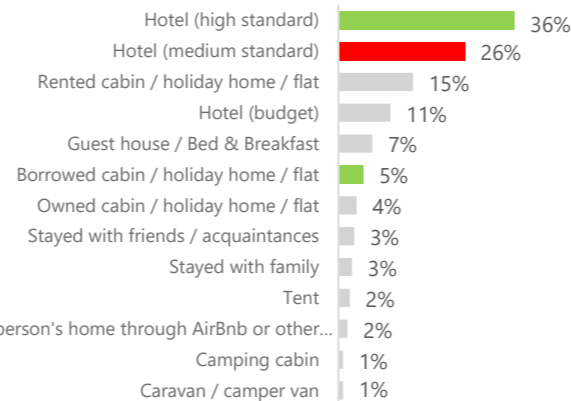
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



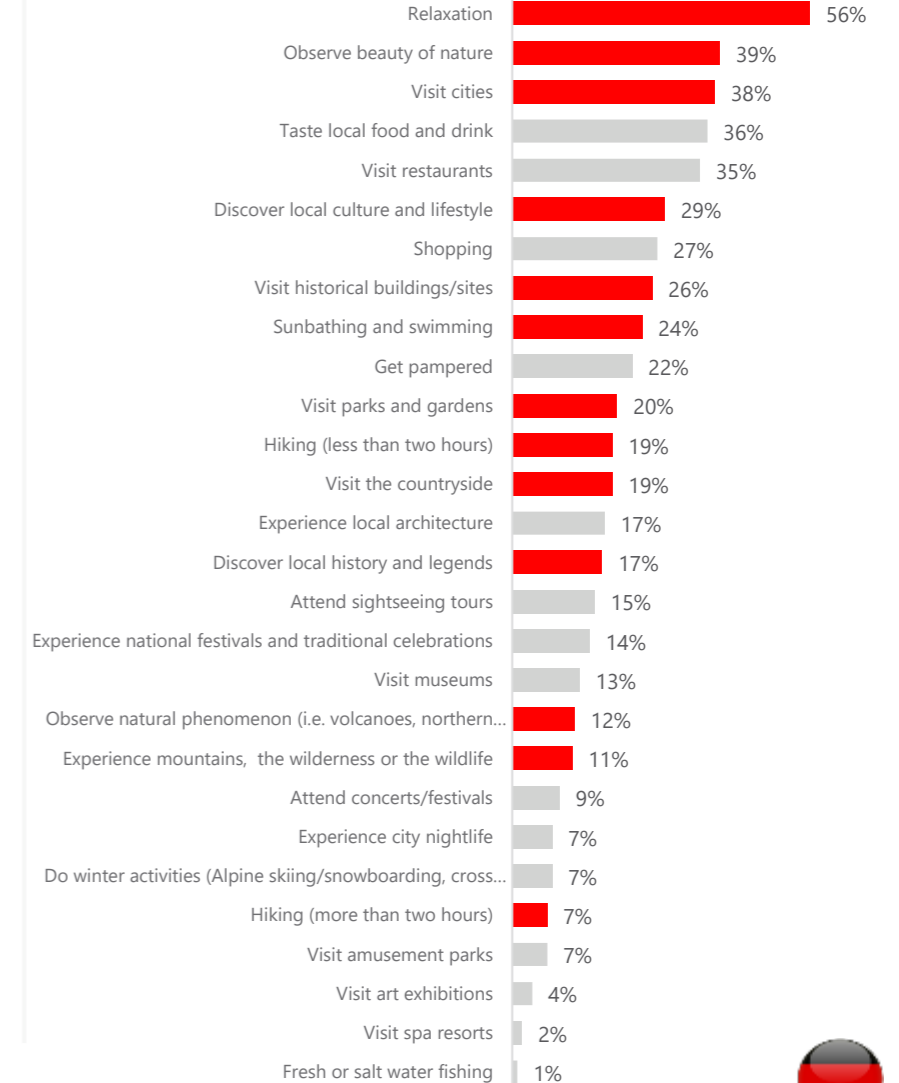
ACCOMMODATION



ACTIVITIES



ACTIVITIES



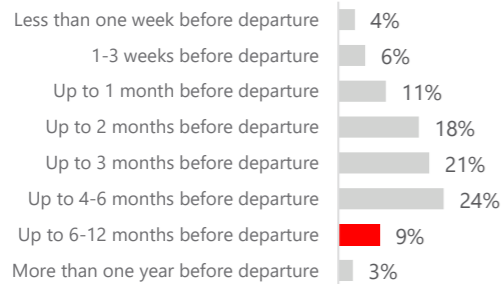
SEGMENT PROFILE - EXTRAVAGANT INDULGENCE

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■ Significantly under indexed in segment

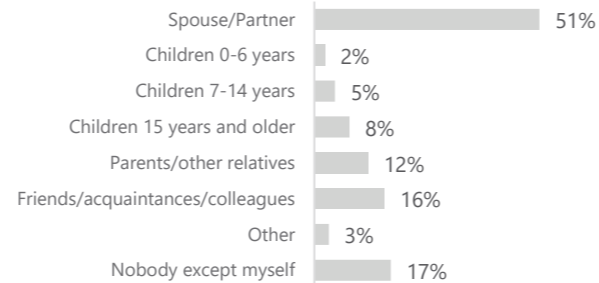
PLANNING



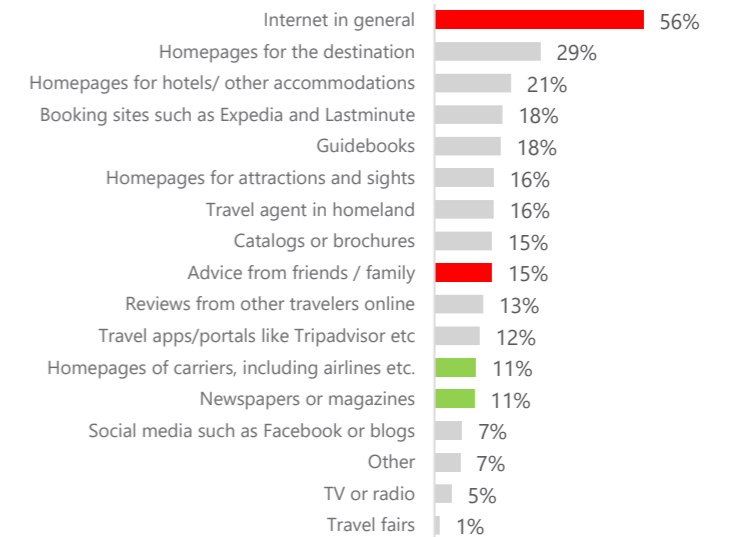
DECISION MADE



INFLUENCERS



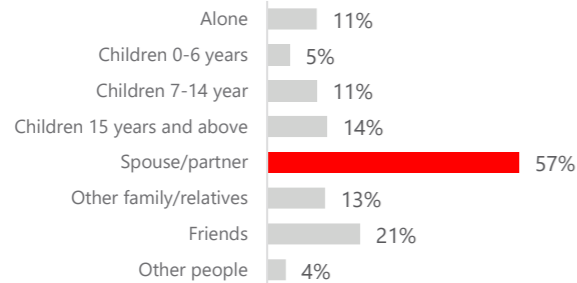
INFORMATION SOURCES



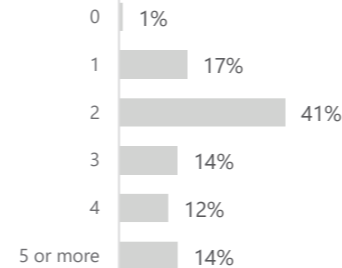
TRAVEL COMPANIONS



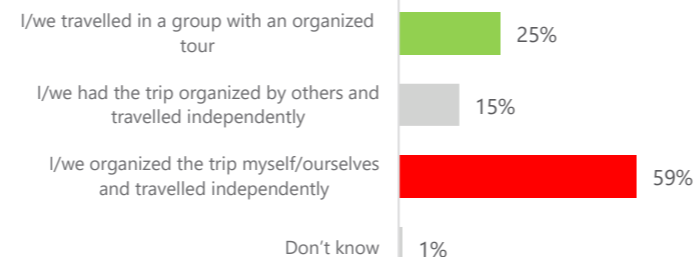
WHO DID YOU TRAVEL WITH



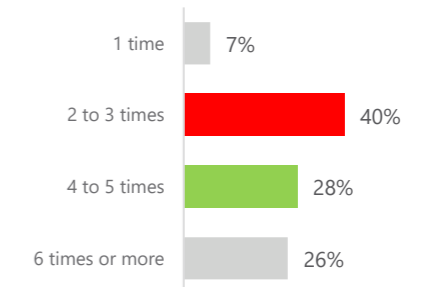
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)





ENERGY

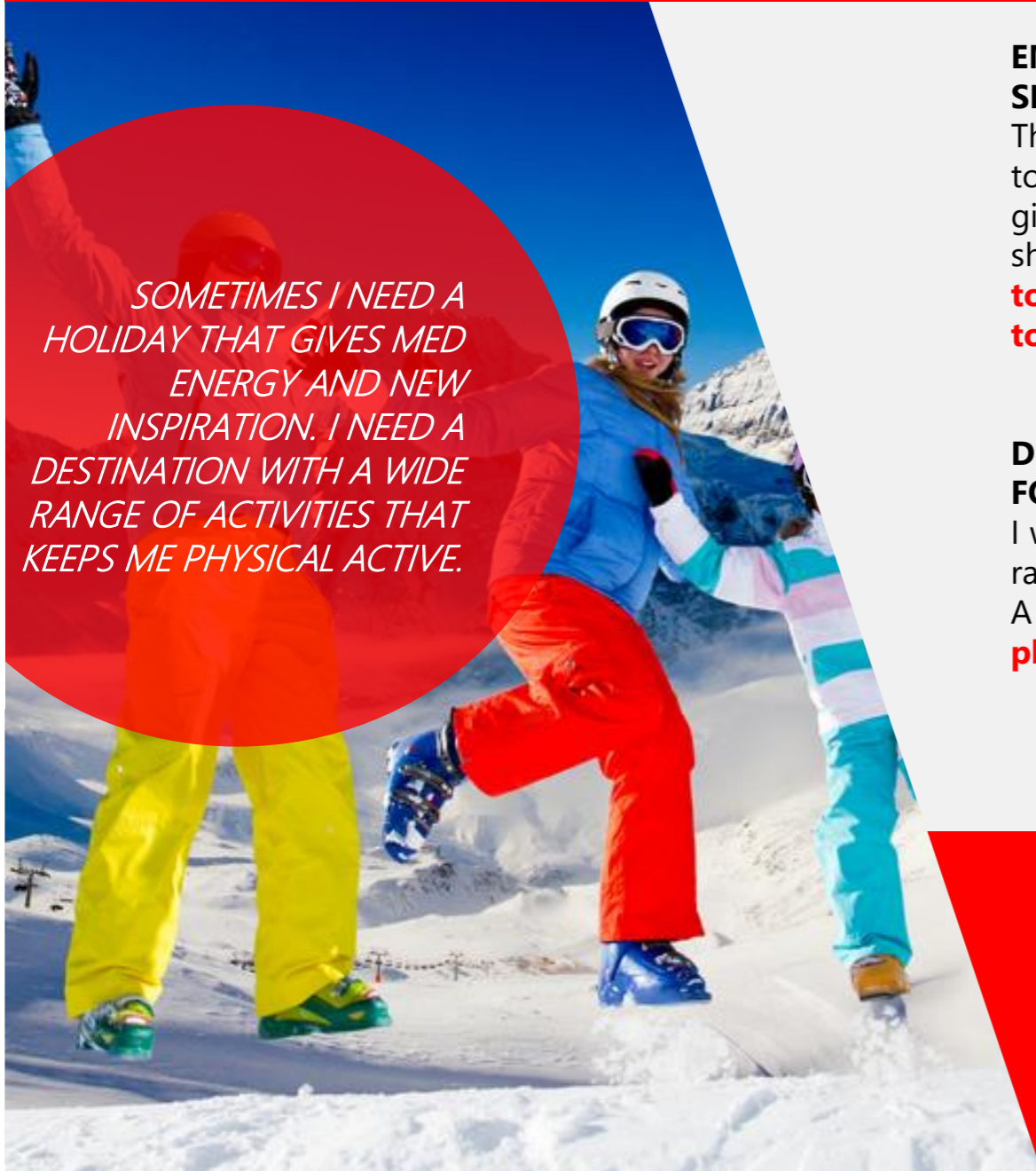
ACTIVE AND
ADVENTUROUS

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**. A holiday should give me **new inspiration**. 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**.

PERSONALITY; WHAT SHOULD IT STAND FOR?

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

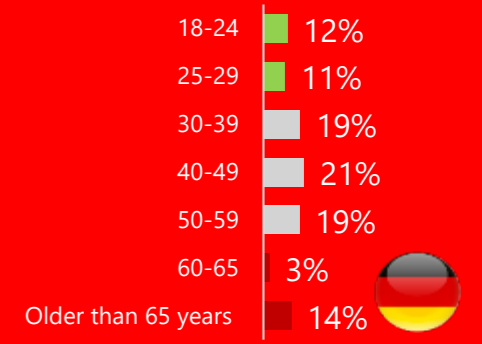
SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?

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 like **adventure**. People who have an active and **busy social life**, and who enjoy **spending time with friends**.

24%
ARE BELOW
30 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 **party and fun!**

HOLIDAY EXPERIENCE

More than in other segments you will find activities like **hiking, winter activities** (Alpine skiing/snowboarding, cross country skiing, dog-sleigh, snowmobile etc.) and visits to **amusement parks**. 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 **feel full of energy**. They often travel 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** or a **guesthouses/B&B's**. 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 more than **3 months before they go** (64%). 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**.

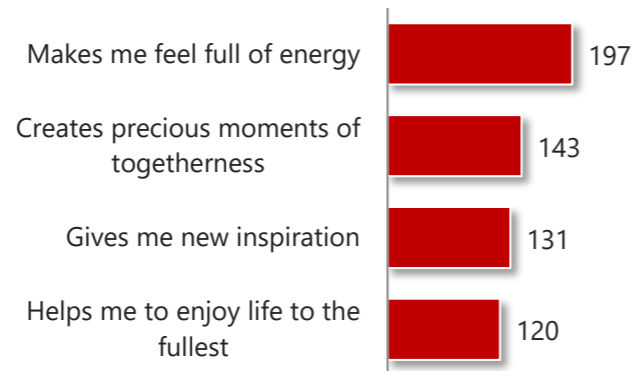


ENERGY

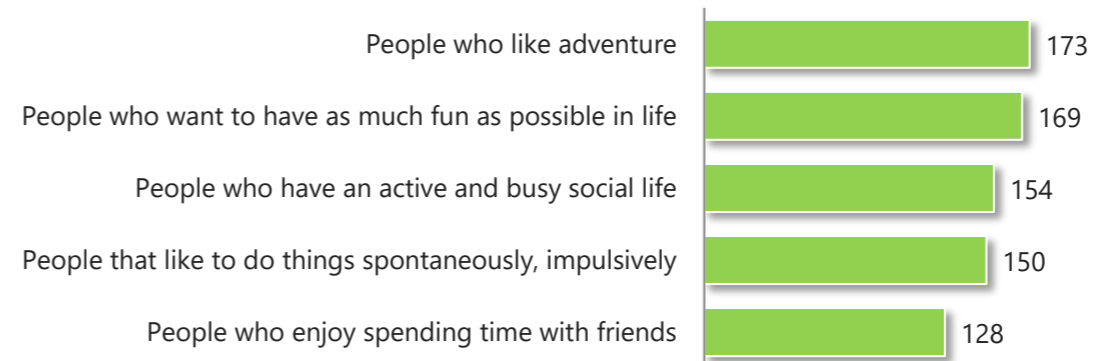
Core motivations



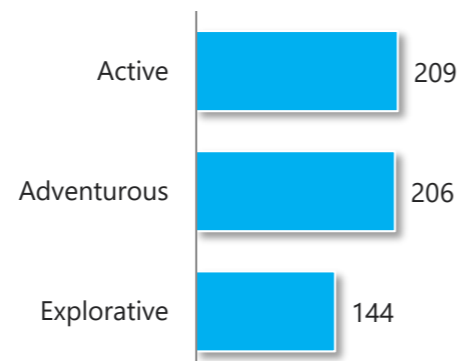
Emotional Benefits



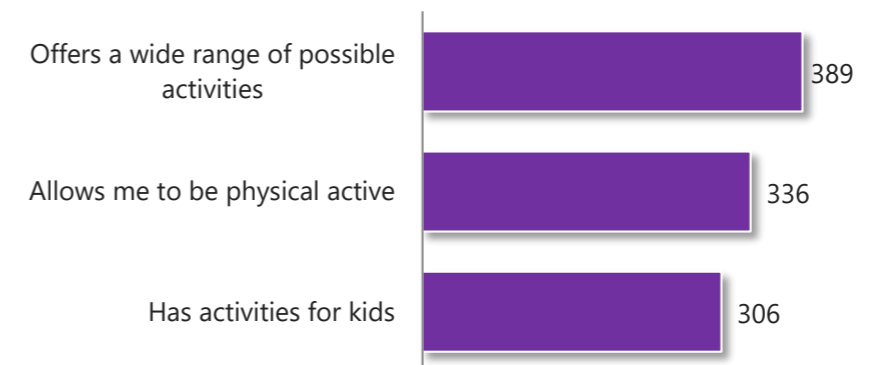
Social Identity



Personality



Destination features



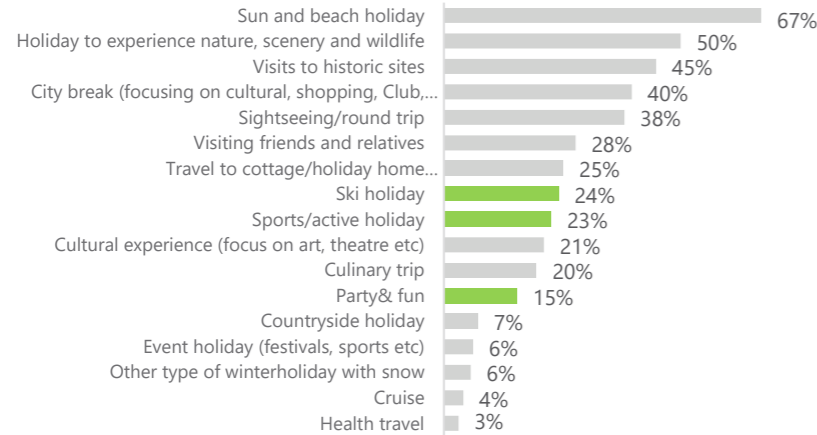
SEGMENT PROFILE – ENERGY

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■ Significantly under indexed in segment

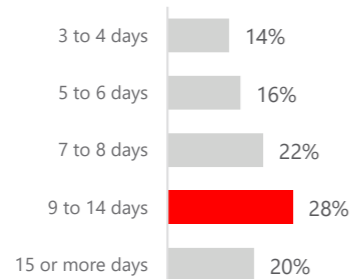
TYOLOGY



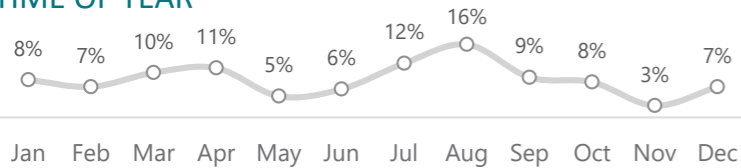
TYPE OF HOLIDAY



DURATION



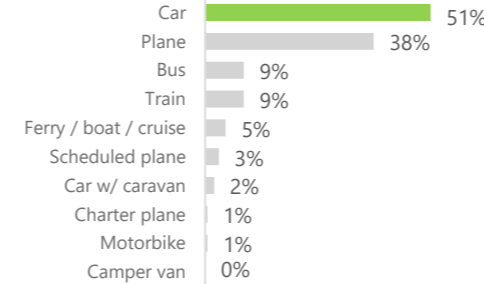
TIME OF YEAR



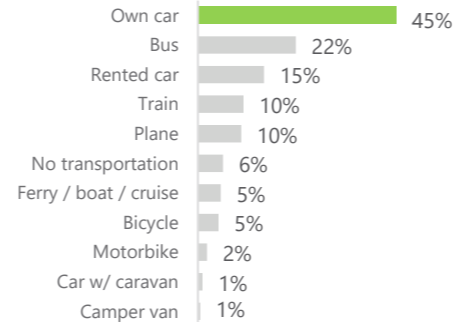
TRANSPORT AND ACOMMODATION



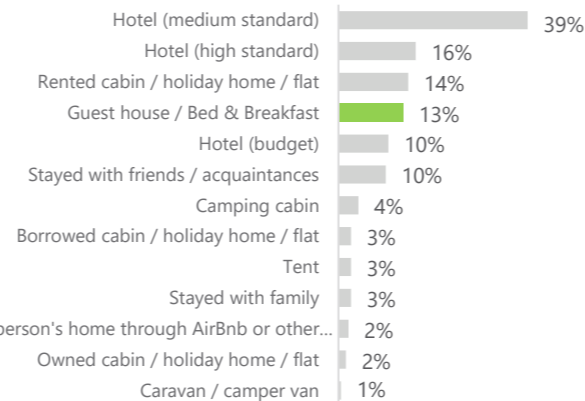
TRANSPORT TO DESTINATION



TRANSPORT ON DESTINATION



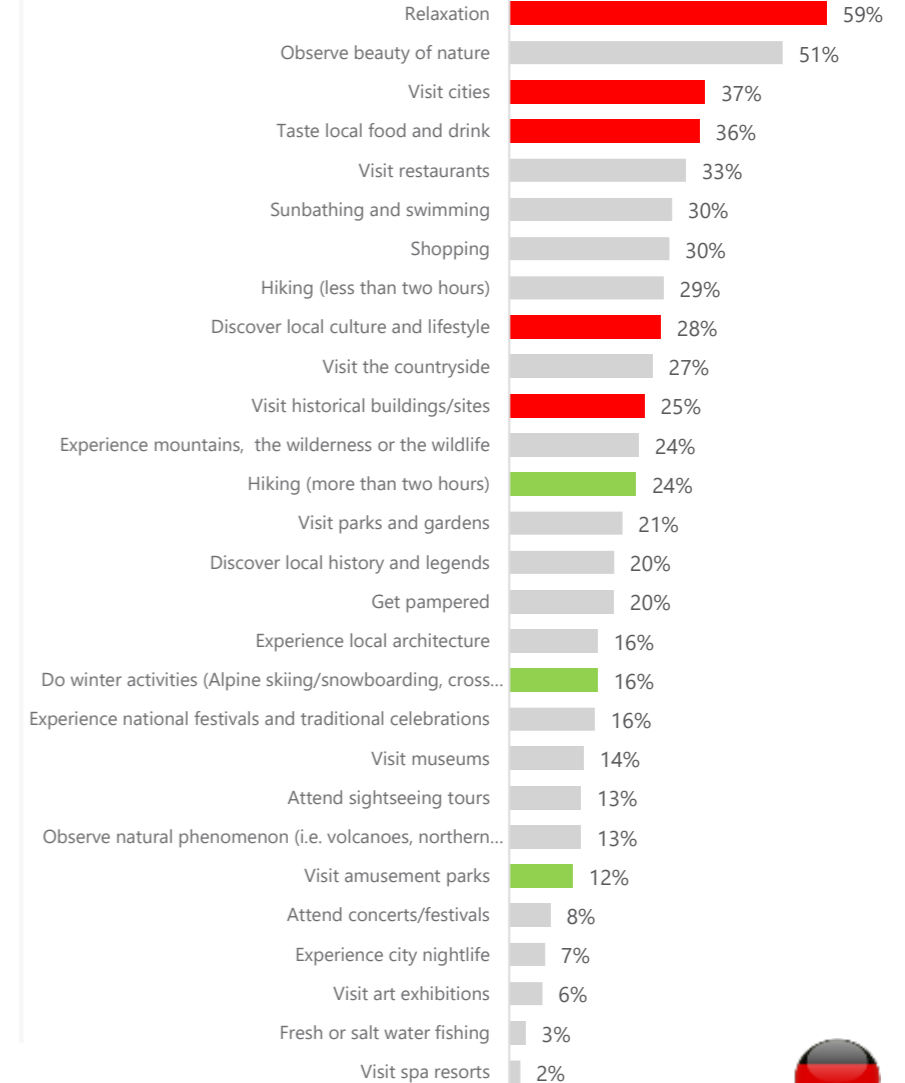
ACCOMMODATION



ACTIVITIES



ACTIVITIES



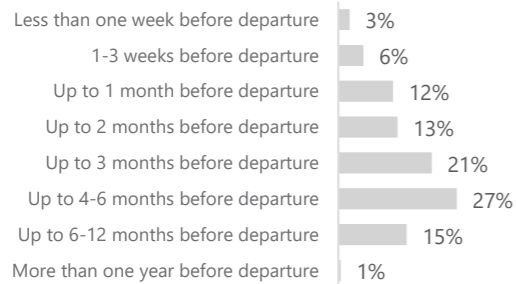
SEGMENT PROFILE - ENERGY

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■ Significantly under indexed in segment

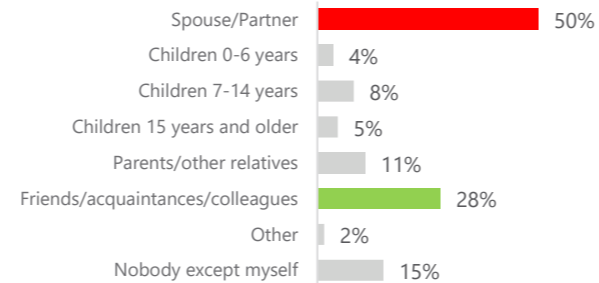
PLANNING



DECISION MADE



INFLUENCERS



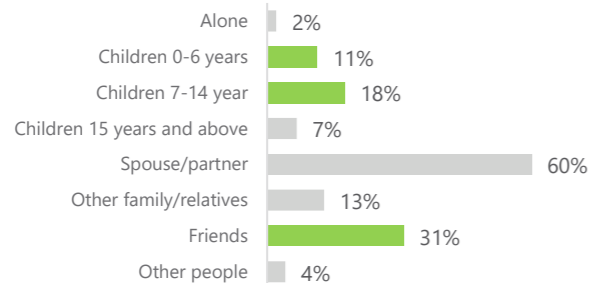
INFORMATION SOURCES



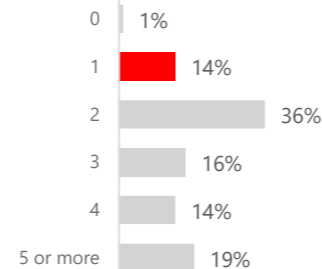
TRAVEL COMPANIONS



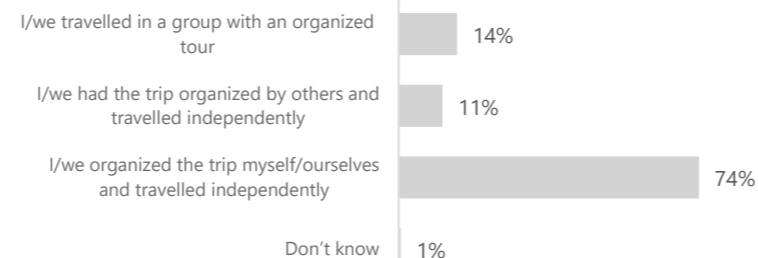
WHO DID YOU TRAVEL WITH



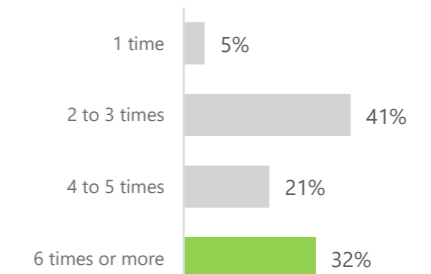
NUMBER OF TRAVEL COMPANIONS



HOW DID YOU TRAVEL



TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)



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 does not have a really rich and strong emotional footprint in Germany.

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

DESTINATION CHARACTERISTICS

The German travelers are generally very clear on what differentiates Norway to other destinations in terms of functional delivery: beautiful nature, unspoiled nature, not ruined by tourism, environmentally friendly offers, live close to nature, quiet environments, allows them to be physically active, good medical care, not too warm and Norway is not for just anybody, it's exclusive.

BRAND PERSONALITY

In Germany, Norway is first and foremost seen as the active and fresh, as well as explorative destination compared to other destinations.

For the German traveler Norway is also seen as the peaceful and structured destination compared to other destinations.

Who
am i?

SOCIAL IDENTITY

Norway has distinct footprint when it comes to social identity in Germany. It's the destination for people wanting something new.

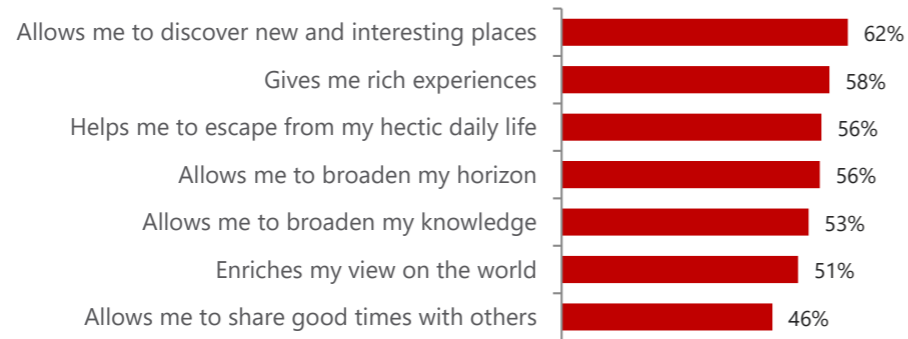
Compared with other destinations, Norway is the destination for people who like to explore and have new experiences. People who like adventure. People who wants a life changing experience.

But also a destination for people who needs time for themselves to relax and unwind.

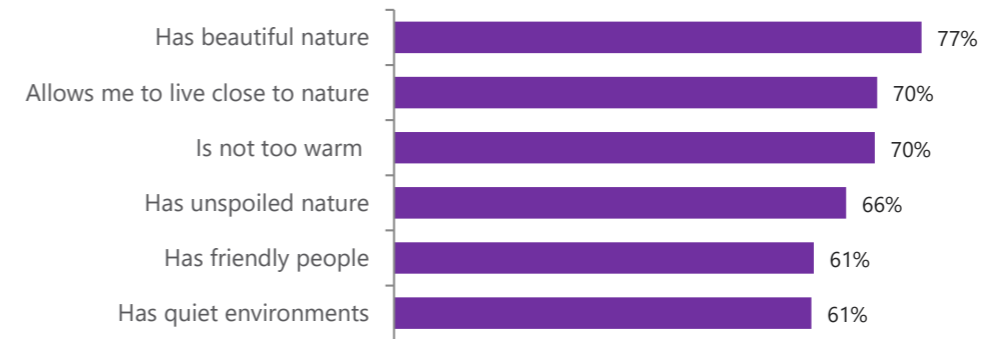
At last but not least Norway is seen as the destination for people who like to have the best things in life and value high quality.

TOP ASSOCIATIONS TO NORWAY ON ALL FOUR FACETS

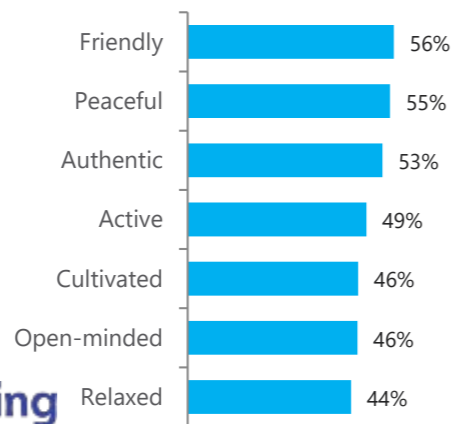
EMOTIONAL ASSOCIATIONS



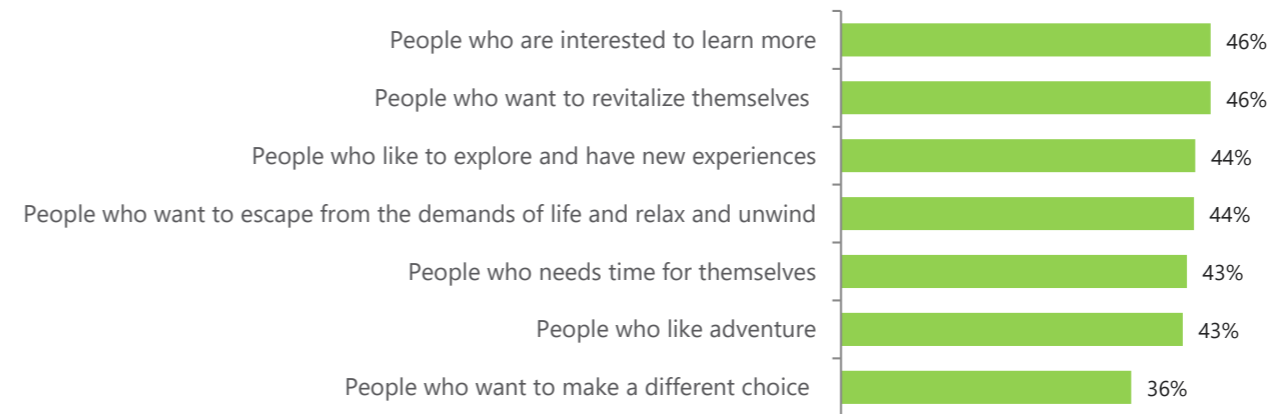
DESTINATION CHARACTERISTICS



BRAND PERSONALITY



SOCIAL IDENTITY



5

THE COMPETITIVE LANDSCAPE

Visits and repeat visits

Strengths and weaknesses

NORWAY'S FIT TO SEGMENTS IN ALL MARKETS

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

	Broadening My Cultural Horizon	Extravagant indulgence	Escape	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
DENMARK	-0.27	-0.22	0.29	-0.24	0.19	0.50	0.05	0.02	-0.26
SWEDEN	-0.25	-0.15	0.14	-0.09	0.01	0.54	0.00	0.04	-0.28
CHINA	0.07	-0.03	0.14	0.35	-0.27	-0.17	-0.05	0.06	-0.24
SPAIN	0.07	0.03	0.19	0.27	-0.32	0.12	-0.13	-0.03	-0.28
ITALY	0.08	-0.03	0.21	0.37	-0.38	-0.06	-0.05	0.10	-0.19
NETHERLANDS	0.09	-0.17	0.28	0.43	-0.25	-0.05	0.13	-0.15	-0.19
FRANCE	0.06	-0.11	0.26	0.36	-0.36	0.03	-0.09	-0.06	-0.19
AVERAGE	0.06	-0.13	0.22	0.28	-0.22	0.03	-0.03	-0.06	-0.16

Good fit
Neutral fit
Bad fit

OVERVIEW DESTINATIONS FIT IN THE GERMAN MARKET

Segments/ destinations	Playful Liberation	Social Immersion	Sharing & Caring	Escape	Control	Broadening My Cultural Horizon	Adventures in the World of Natural Beauty	Extravagant indulgence	Energy
Austria	-0.08	-0.15	0.36	0.05	0.61	-0.14	-0.57	-0.10	-0.08
Canada	-0.13	-0.12	-0.47	0.01	-0.11	0.03	0.62	0.06	0.10
Croatia	0.12	0.12	0.52	0.31	0.03	-0.35	-0.34	-0.26	0.18
Czech Republic	-0.11	0.20	0.33	-0.17	0.30	0.14	-0.38	-0.25	-0.07
Denmark	-0.06	-0.24	0.36	0.38	0.50	-0.23	-0.38	-0.22	-0.10
Finland	-0.10	-0.01	-0.27	0.33	-0.23	0.24	0.53	-0.39	0.08
France	0.00	-0.04	0.09	-0.23	0.00	0.17	-0.47	0.36	-0.20
Iceland	-0.05	-0.04	-0.49	0.15	-0.28	0.17	0.73	-0.21	0.07
Italy	0.27	0.14	0.47	0.01	0.01	-0.17	-0.62	-0.05	0.12
Netherlands	0.04	0.02	0.44	0.01	0.56	-0.12	-0.56	-0.23	-0.05
New Zealand	-0.03	-0.13	-0.57	0.00	-0.29	0.03	0.69	0.16	0.08
Norway	-0.10	-0.16	-0.39	0.24	-0.14	0.13	0.51	-0.09	-0.02
Portugal	-0.09	0.33	0.36	0.14	-0.18	0.13	-0.23	-0.27	0.01
Scotland	-0.20	0.11	-0.35	0.26	-0.29	0.31	0.60	-0.31	-0.05
South Africa	0.07	-0.03	-0.42	-0.20	-0.25	-0.06	0.35	0.38	-0.01
Spain	0.36	0.10	0.41	-0.03	0.18	-0.29	-0.59	-0.03	0.16
Sweden	-0.10	-0.13	-0.02	0.46	0.02	0.01	0.09	-0.22	-0.12
Switzerland	-0.11	-0.39	-0.01	-0.11	0.48	-0.10	-0.41	0.50	-0.27
Thailand	0.27	0.09	-0.10	0.08	-0.39	-0.11	0.22	0.05	0.13
USA	0.13	-0.07	-0.47	-0.57	-0.02	0.04	0.23	0.45	0.11



6

GLOBAL RECOMMENDATIONS

Brand positioning

THE TASK AT HAND



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

IN CONCLUSION ...

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

1

WE SEE A FURTHER FRAGMENTATION OF NEEDS IN THE HOLIDAY SEGMENTATION

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

2

NORWAY CONNECTS REASONABLY WELL WITH MULTIPLE NEEDS

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

3

IT'S THE ONLY WAY TO STAY COMPETITIVE

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

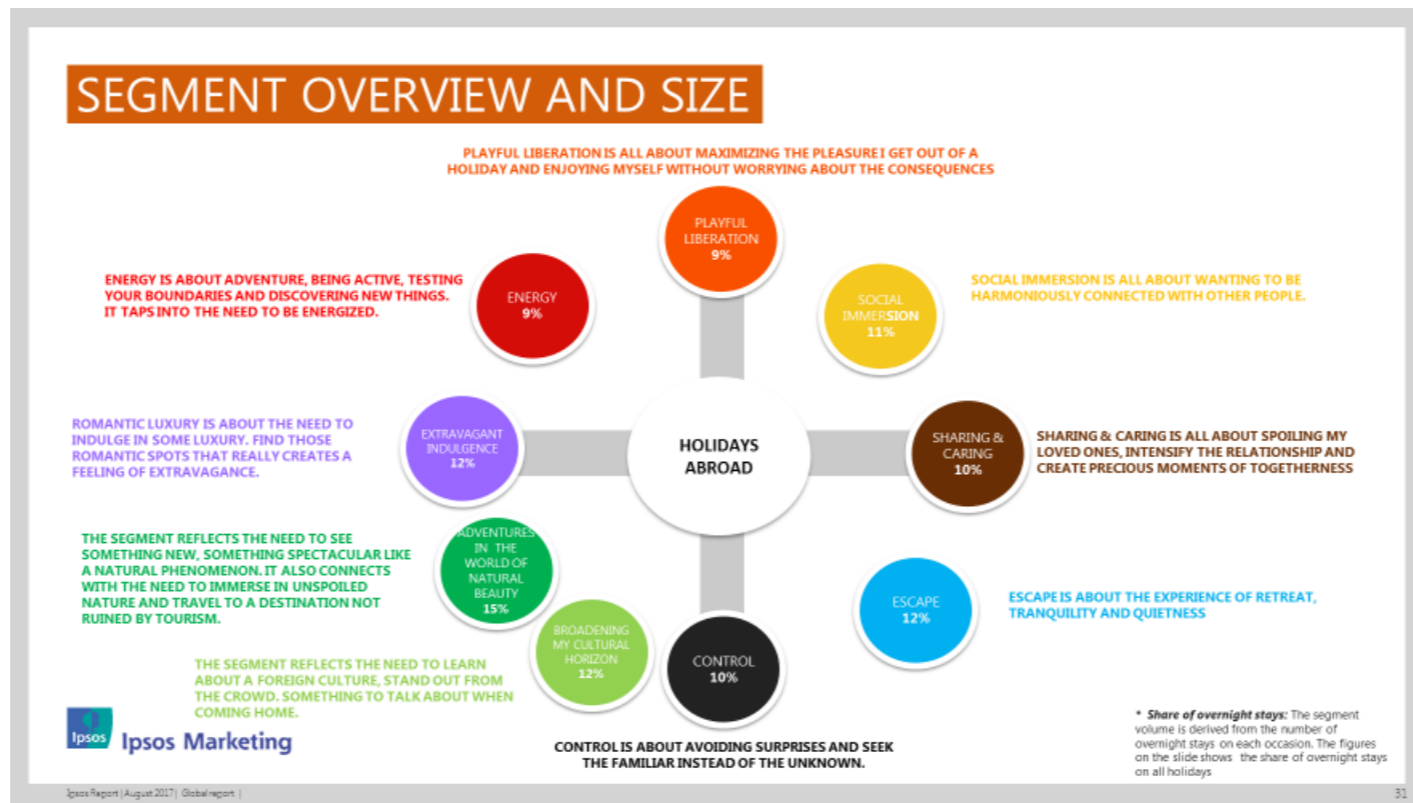
4

NORWAY HAS A LOT TO OFFER

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

WE SEE A FURTHER FRAGMENTATION OF HOLIDAY NEEDS

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



WE SEE A FURTHER FRAGMENTATION OF HOLIDAY NEEDS

There are a lot of differences in size by market

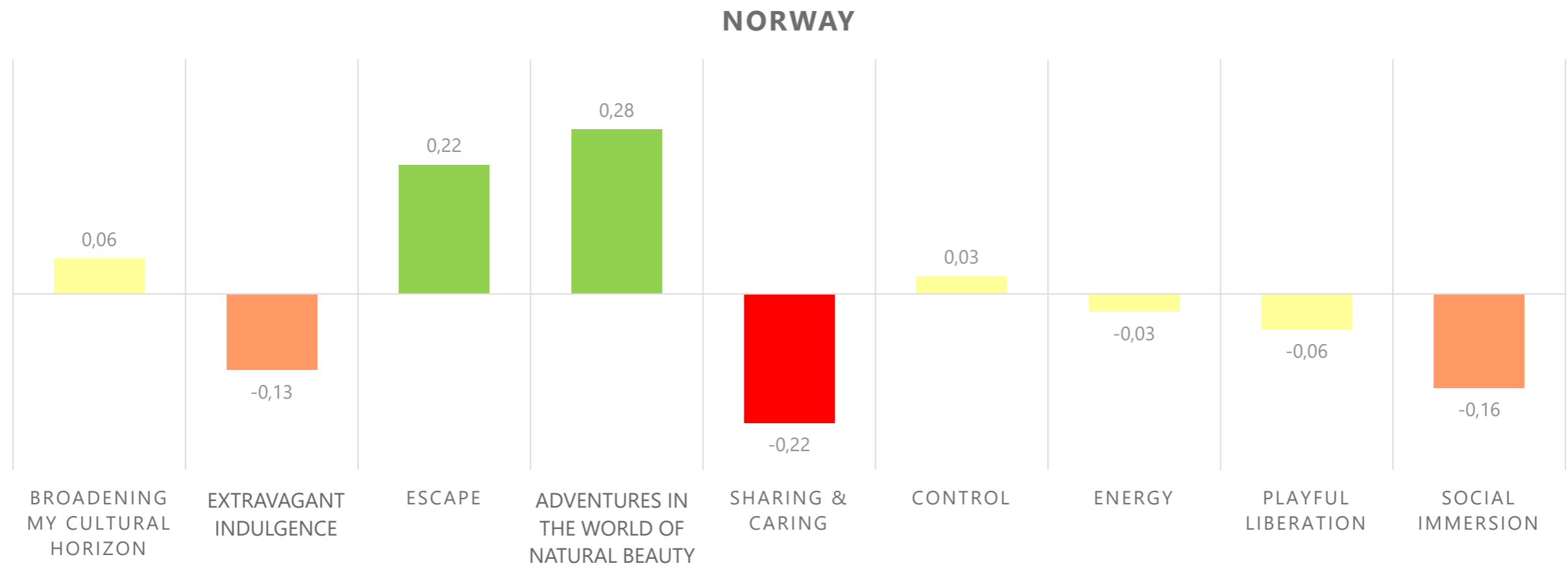
TOP 3 (% overnight stays*)

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

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

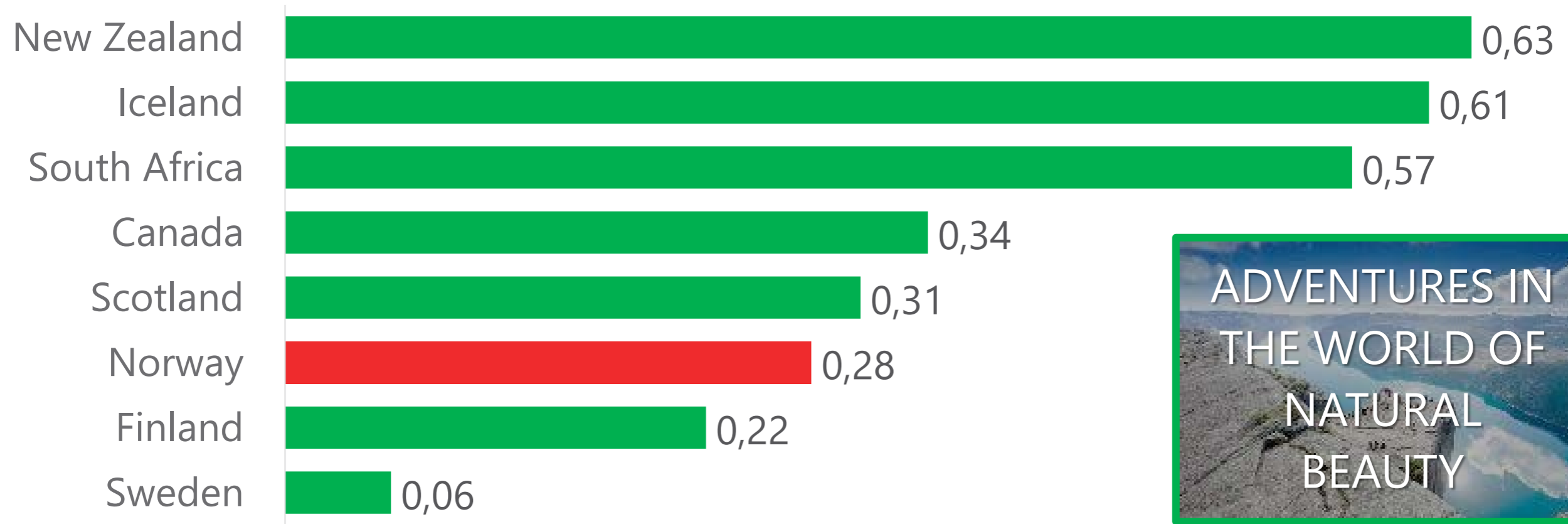
NORWAY CONNECTS WELL WITH MULTIPLE NEEDS

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



DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Nature is a highly competitive area



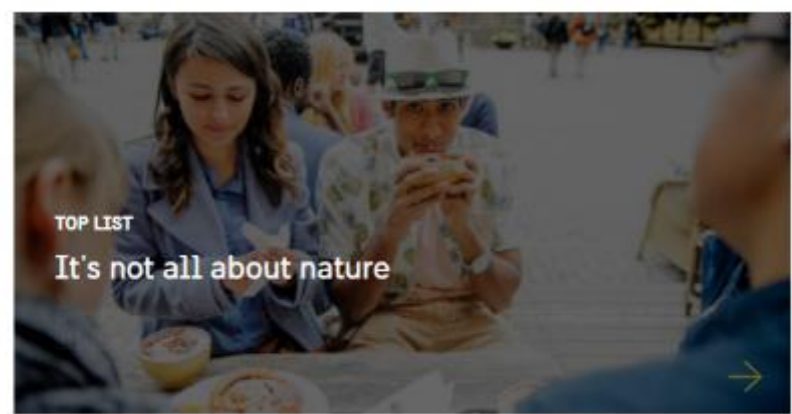
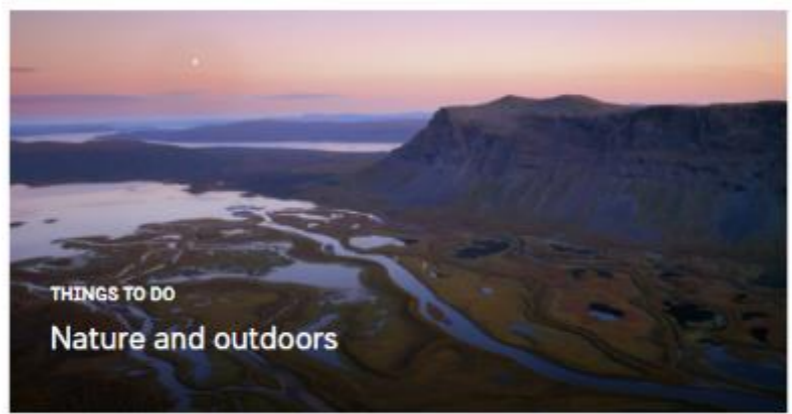
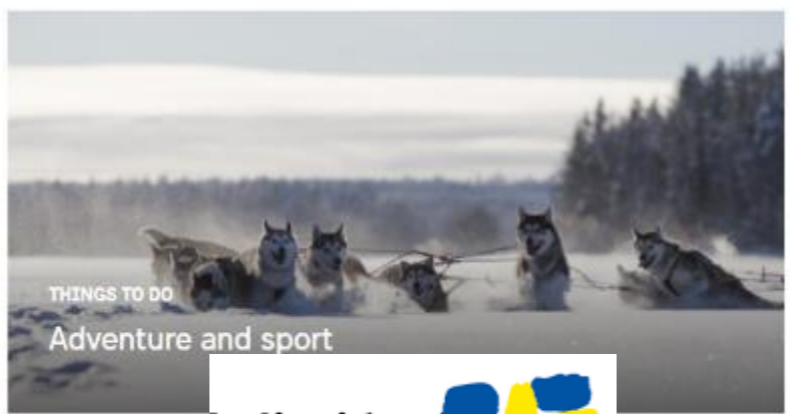
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs

The screenshot displays the '100% PURE NEW ZEALAND' website. The main navigation bar includes 'Destinations', 'Things to do', 'Facts', 'Travel to NZ', 'Recommended trips', 'Transport', and 'Accommodation'. A large hero image features a blue helicopter over a lake with a 'LUXURY' text overlay. Below this are several promotional tiles: 'Top luxury experiences' (with a play button), 'Luxury accommodation', 'New Zealand's Marquee Golf Courses', 'Exclusive Walking and Hiking', 'World-class Wine and Cuisine', 'Private Fly Fishing', and 'Super yacht cruising'. Each tile includes a small image and a right-pointing arrow.

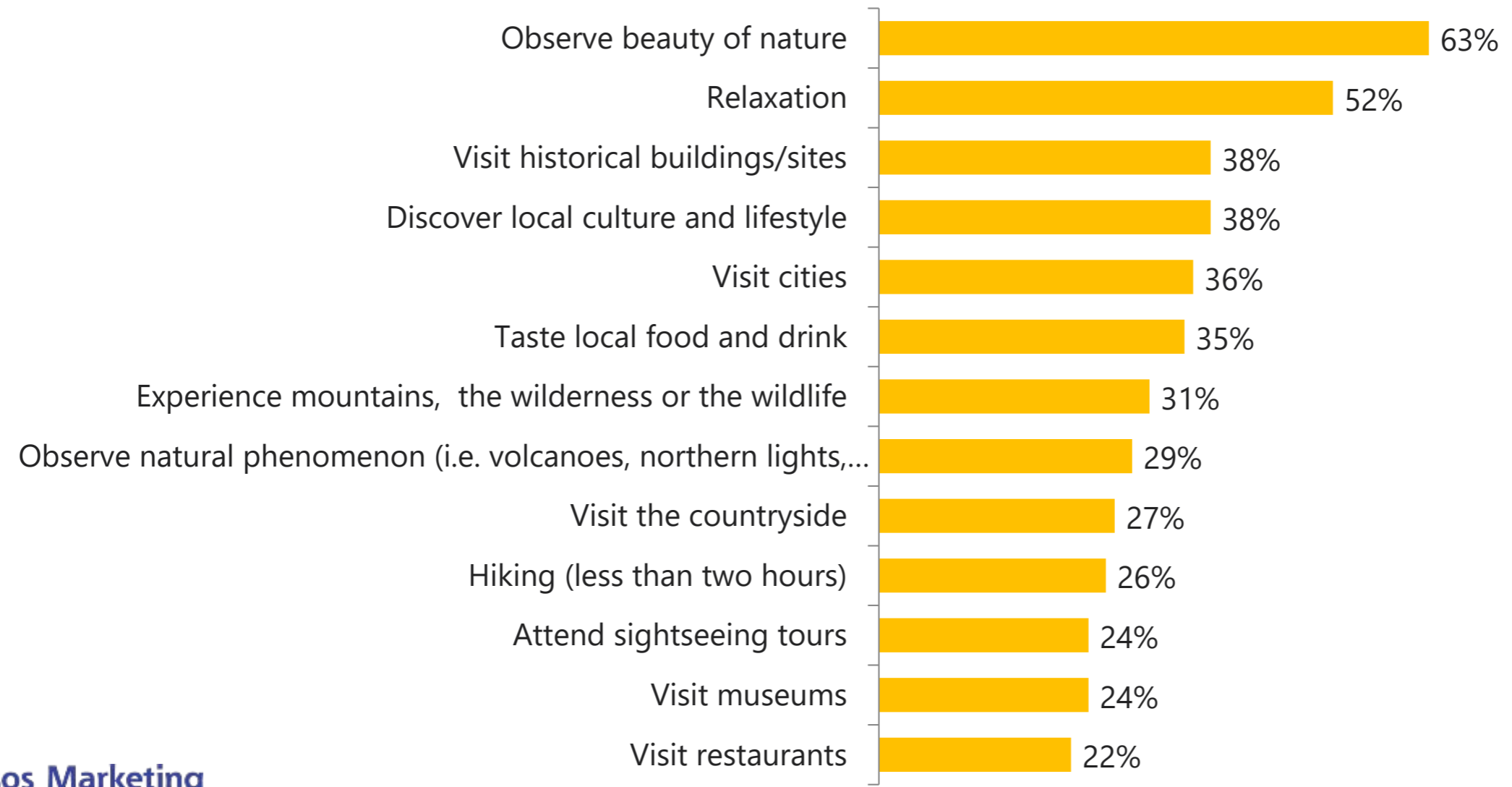
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs



NORWAY HAS A LOT TO OFFER

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



NORWAY HAS A LOT TO OFFER

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





RECOMMENDATIONS FOR GERMANY

Where do we go from here?

NORWAY NEEDS TO CONTINUE TO WORK ON HOLIDAY BASICS IN GERMANY

Norway fails to meet some basic holiday expectations

Good value for money. Good local cuisine.

Interesting sights.

New and interesting places. Escape and revitalize.

Beautiful nature

Relaxed, friendly and cozy. Sharing good times.



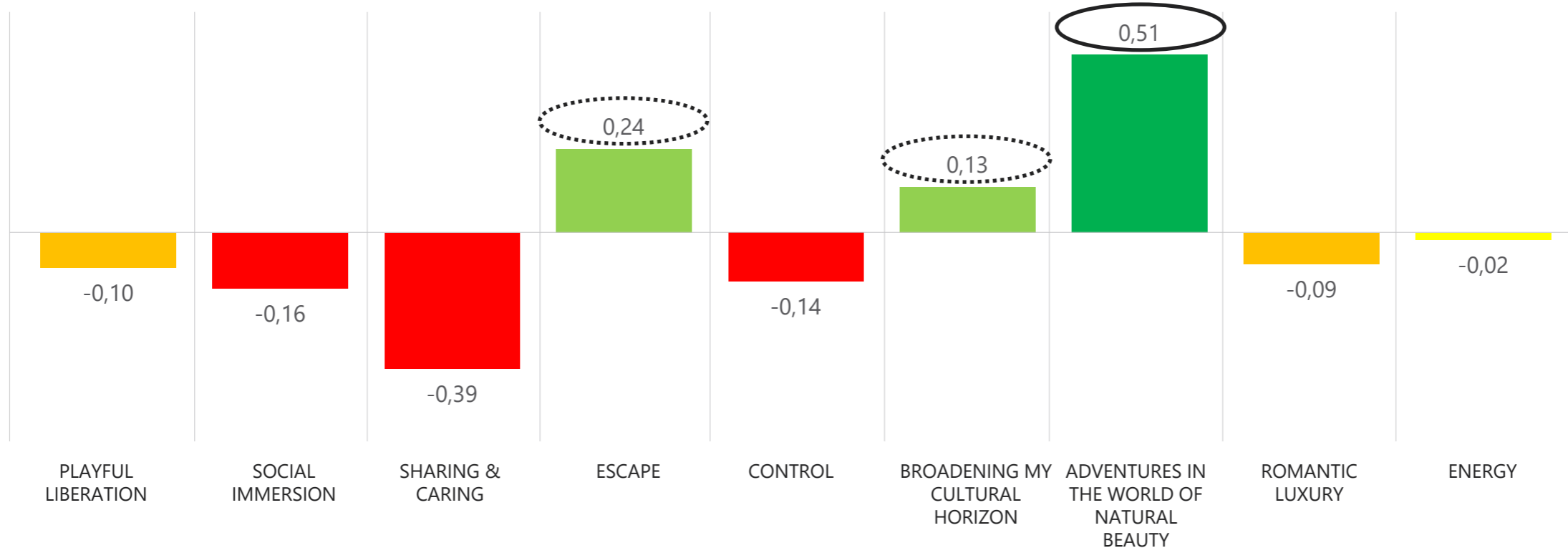
Learn more.

Peaceful



NORWAY CONNECTS WELL WITH MULTIPLE NEEDS IN GERMANY

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



LOOKING AT NORWAY'S CURRENT STRENGTHS

AND POSITION DIFFERENT ROUTES THAT CAN BE EXPLORED

THE OBVIOUS TARGET



POSSIBLE ADDITIONS



Norway has comparative advantages in combining nature and culture. It's a unique possibility to broaden my knowledge and my horizon. Get rich experiences and enrich my view on the world. Norway should allow me to discover new and interesting places. But we need to work on interesting sights, cultural heritage and art.



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



QUESTIONS?

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