

ACTIVATING THE NORWAY BRAND

**A Global report on holiday need and segments
for Innovation Norway**

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AGENDA

- 1) The philosophy behind
- 2) The ideal holiday
- 3) Segments
- 4) Brand profile Norway
- 5) The competitive landscape
- 6) Recommendations

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

BUILDING DEEP BRAND RELATIONSHIPS WITH CENSYDIAM

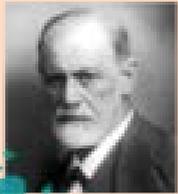
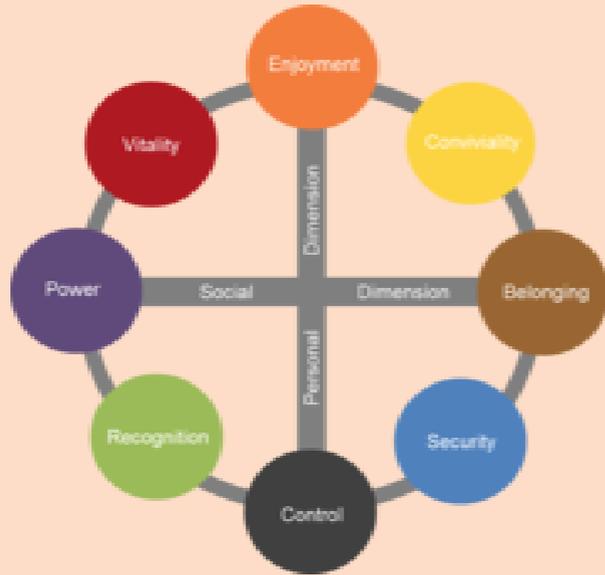
Censydiam Motivational Framework

BE RELEVANT

*Associate your brand with
relevant category roles*



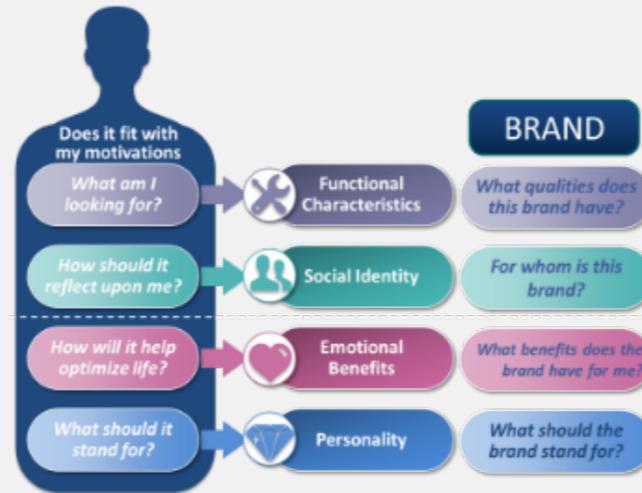
CENSYDIAM IN A NUTSHELL



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



Precise

Granularity of description opens up those needs not yet identified

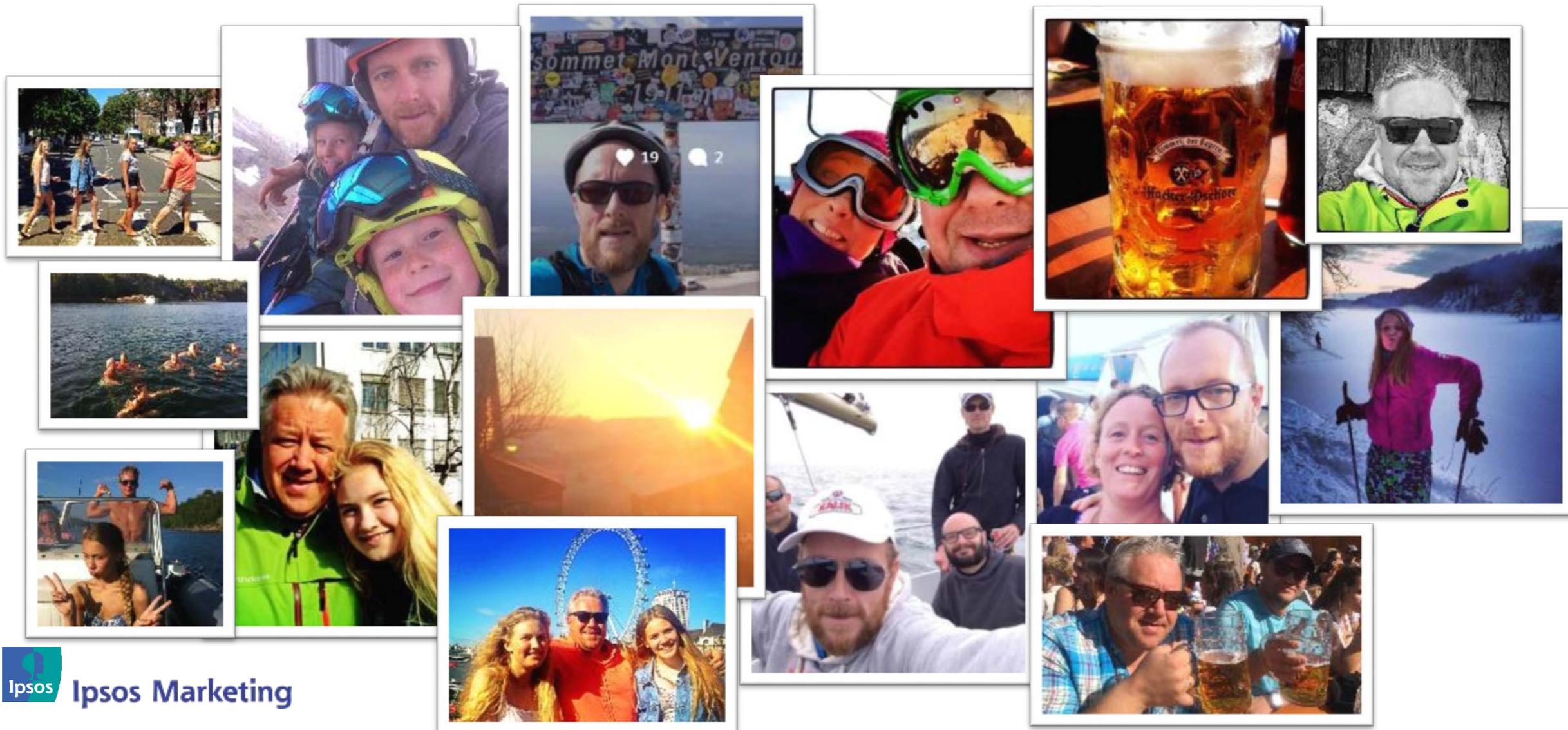


Universal

Comparison possible across markets

THE SAME PERSON, BUT DIFFERENT SITUATIONS AND DIFFERENT MOTIVATIONS

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



FROM CENSYDIAM HYPOTHESIS TO GLOBAL CATEGORY FRAME

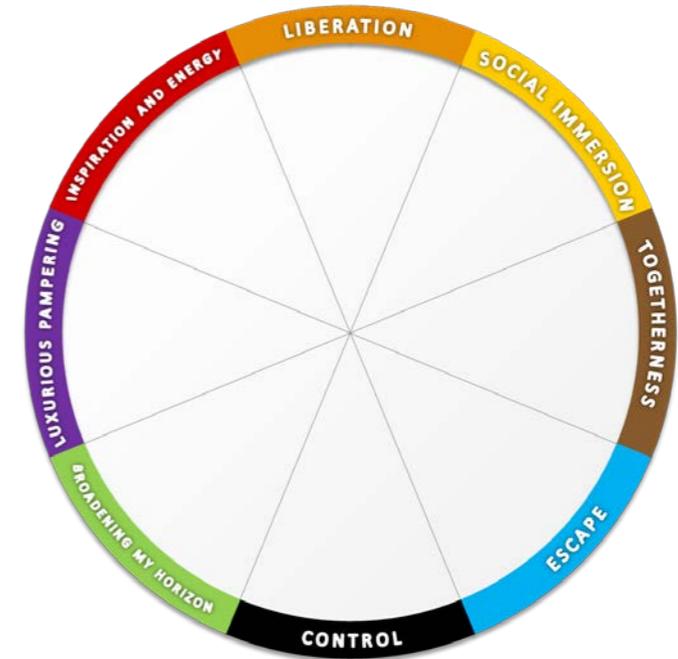
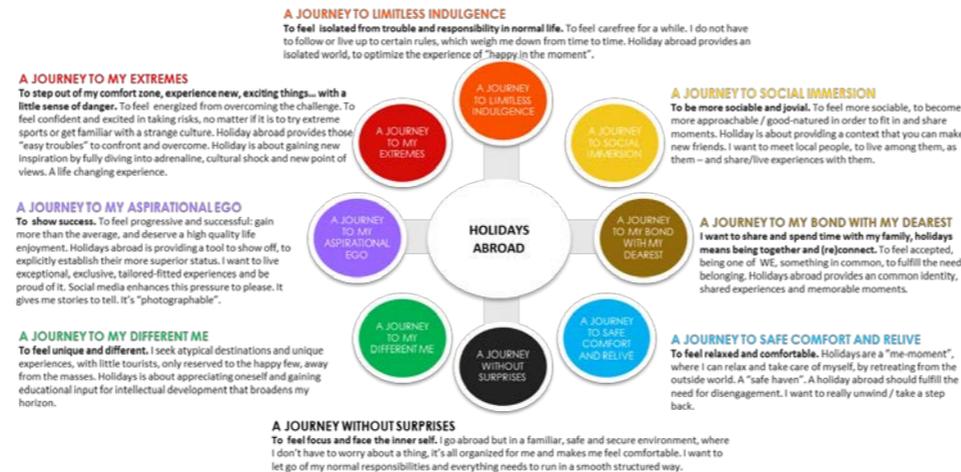
WE HAVE CONDUCTED 12.000 INTERVIEWS IN 10 MARKETS

EACH RESPONDENT HAS PROFILED 2 HOLIDAY OCCASIONS – SO WE HAVE 24.000 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.





AND NOW THE RESULTS...

2

THE IDEAL HOLIDAY EXPERIENCE

Global category needs

Potential needs and drivers Holidays abroad

Main drivers globally

EMOTIONAL BENEFITS

WHY do people go on holiday?



Allows me to discover new and interesting places

182

Gives me rich experiences

168

Allows me to share good times with others

164

IDEAL DESTINATION CHARACTERISTICS



WHAT expectations are related to specific destination characteristics?



IDEAL SOCIAL IDENTITY

HOW should a holiday reflect upon me?

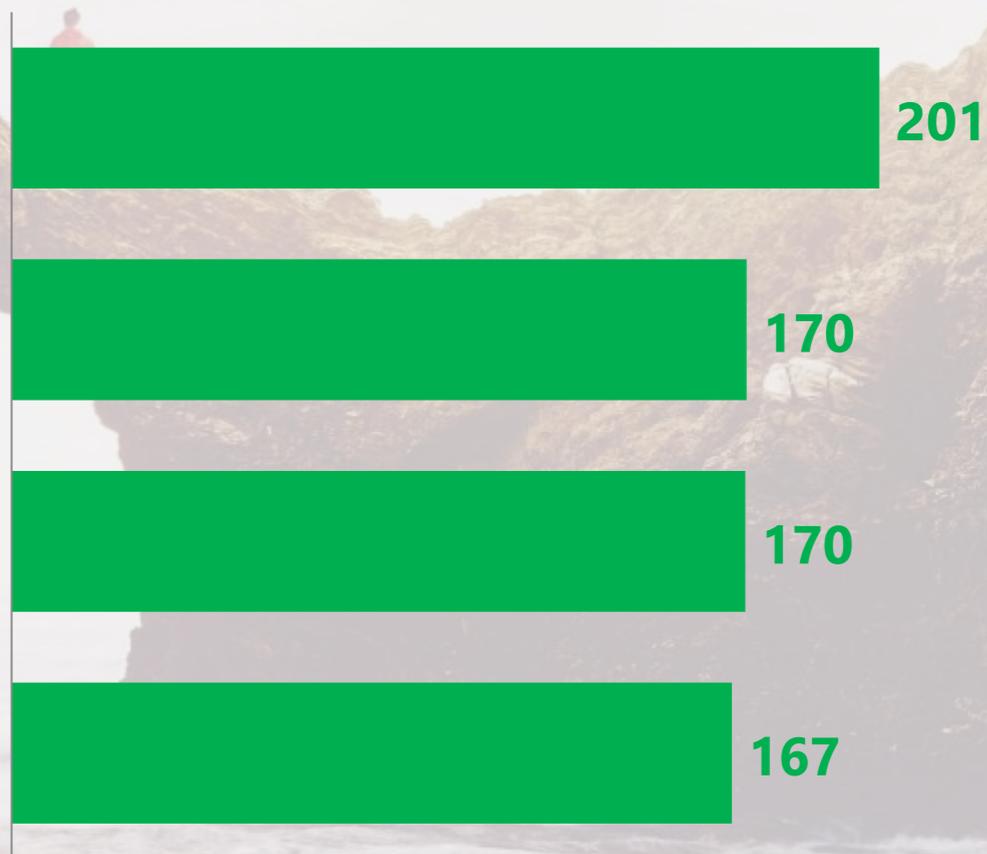


People who like to explore and have new experiences

People who are interested to learn more

People who want to escape from the demands of life

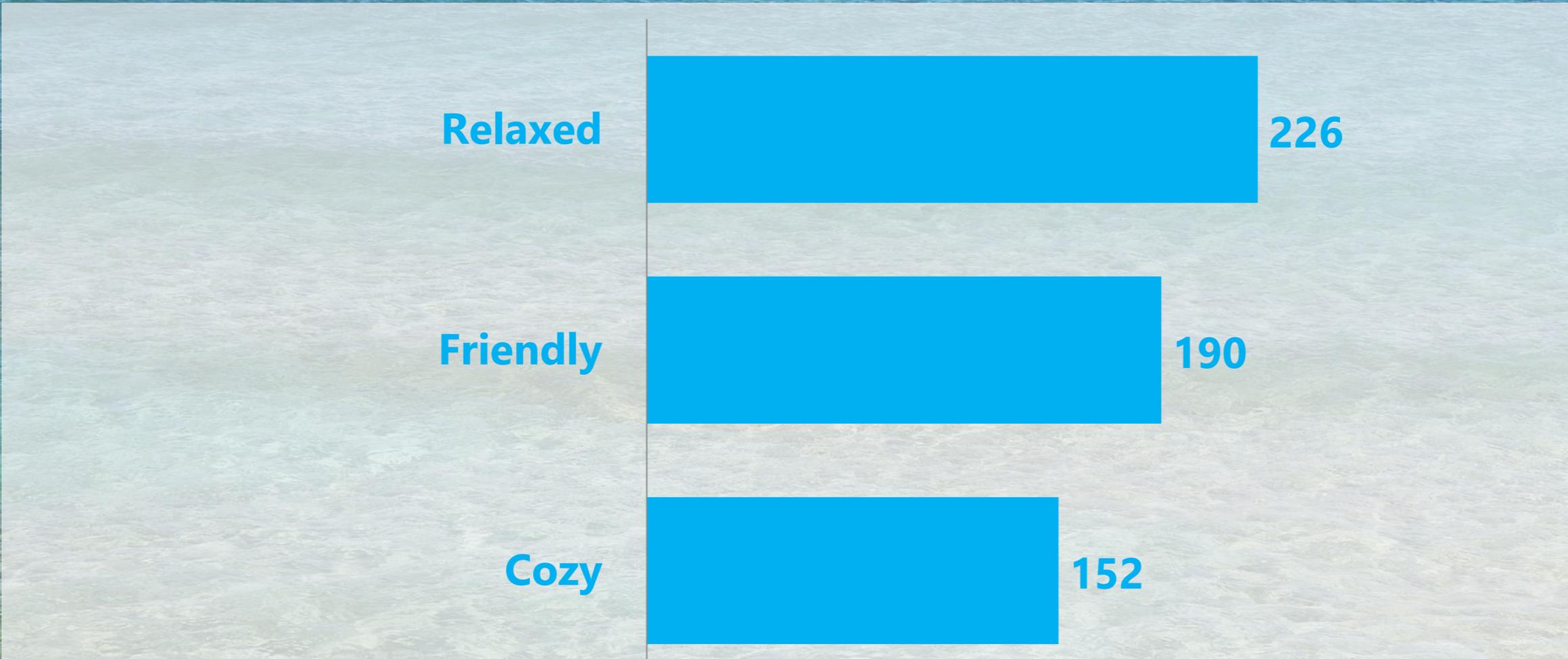
People who enjoy spending time with friends



IDEAL BRAND PERSONALITY



WHAT should the destination stand for?



THE WAY AHEAD FOR NORWAY TO MEET GENERIC CATEGORY EXPECTATIONS

These recommendations are on global level – there will be some market differences

Strengthen the emotional benefits



Allows me to discover new and interesting places

Allows me to share good times with others

Gives me rich experiences



Develop destination features

Has beautiful nature

Has friendly people

Has good local cuisine

Has interesting sights

Has rich cultural heritage

Good value for money

Is easy to travel to (except Sweden and Denmark)

Personality associations are slim



Relaxed

Cozy

Friendly



Weak social identity

People who like to explore and have new experiences (weak in Sweden and Denmark)

People who want to escape from the demands of life and relax and unwind (strong in Denmark already)

People who enjoy spending time with friends (strong in Denmark already)

People who are interested to learn more (strong in US and UK already)

3

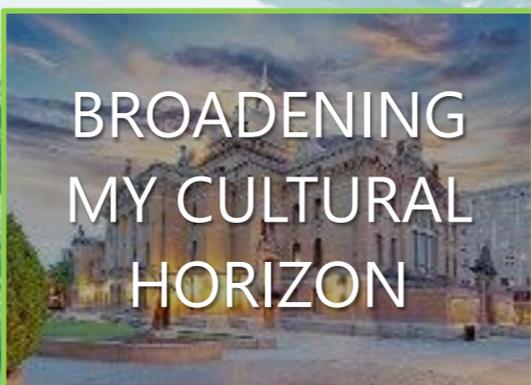
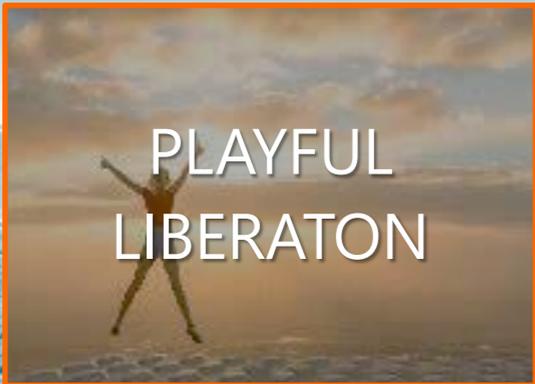
MOTIVATIONAL SEGMENTS

Why

What

Who

9 DISTINCT SEGMENTS



SEGMENT OVERVIEW AND SIZE

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

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

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

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

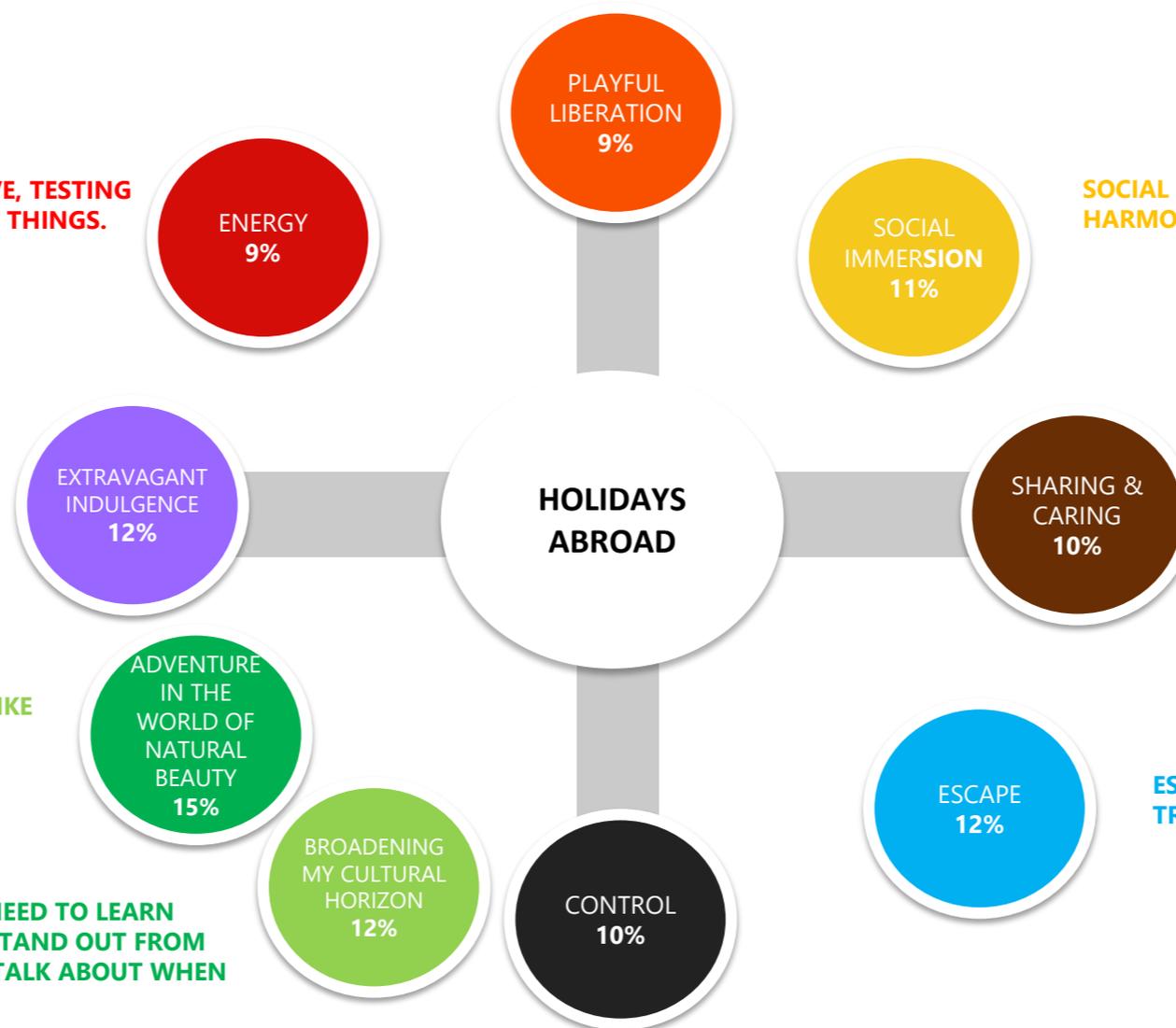
THE SEGMENT REFLECTS THE NEED TO SEE SOMETHING NEW, SOMETHING SPECTACULAR LIKE A NATURAL PHENOMENON. IT ALSO CONNECTS WITH THE NEED TO IMMERSE IN UNSPOILED NATURE AND TRAVEL TO A DESTINATION NOT RUINED BY TOURISM.

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

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

ESCAPE IS ABOUT THE EXPERIENCE OF RETREAT, TRANQUILITY AND QUIETNESS

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



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



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.



Playful **Fresh** **Party people**

Feel full of energy

Liberation

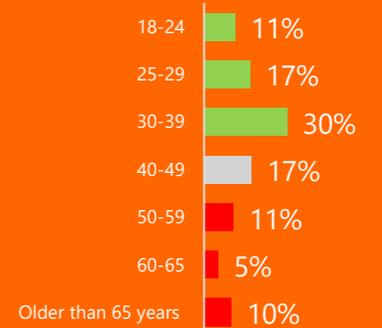
Good beaches **Good shopping**

People who maximize the fun

58%
ARE BELOW
40 YEARS



**SHARE OF
OVERNIGHT
STAYS**
9%



PLAYFUL LIBERATION

TYOLOGY

Beach holiday

Ski holiday

Culinary trip

INFORMATION SOURCE

Influenced by travel companions

Booking sites

Social Media



ACTIVITIES

City nightlife

Spa resorts

Amusement parks

TRAVEL COMPANIONS

Friends

Children 0-16 year



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



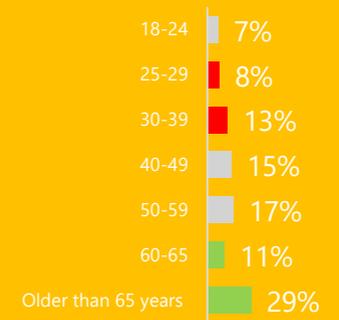
*SOMETIMES I NEED TO
IMMERSE MYSELF INTO
LOCAL LIFE, MEET NEW
PEOPLE AND EAT LOCAL
CUISINE*

Always looking to connect with others
Sociable **With an active & busy social life**
Meet new people **Has friendly people** **Outgoing**
Immerse in local life
Friendly **Open-minded**
Good local cuisine

40%
ARE ABOVE
60 YEARS



SHARE OF
OVERNIGHT
STAYS
11%



SOCIAL IMMERSION

TYPOLOGY

Variety of holiday types

More with bus

Stay and/or travel with friends

INFORMATION SOURCE

Booking sites

Social media



ACTIVITIES

Taste local food & drinks

Visit cities

Discover local culture & lifestyle

Discover local history & legends

Visit museums

Discover local architecture

Experience national festivals



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.

Spoil loved ones For family people
With strong family values

Intensify relationships
Share good times

Create precious moments of togetherness
Guarenteed sunshine
Few language barriers

Friendly
Relaxed
Sociable
Easy to travel to / to travel around
Good value for money

74%
ARE ABOVE
40 YEARS



SHARE OF
OVERNIGHT
STAYS
10%



SHARING AND CARING

TYPOLOGY

Visiting Friends & Family

Travel to cottage/holiday home

With car

INFORMATION SOURCE

Advice from friends & family

Influenced by older children
& other relatives



ACTIVITIES

Relaxation

Sunbathing & swimming

TRAVEL COMPANIONS

Children

Other family members



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.

Peaceful People who need time for themselves

People who want to revitalize themselves

Harmonious Relaxed

Escape daily hectic life

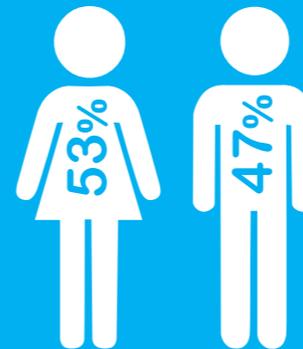
Has quiet environments

Close to nature

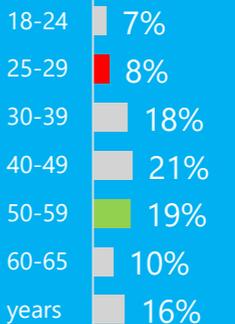
Restore my sense of harmony & balance

Not ruined by tourism

40%
ARE BETWEEN
40-59 YEARS



SHARE OF
OVERNIGHT
STAYS
12%



ESCAPE

TYPOLOGY

Travel to cottage/holiday home

Countryside holiday

With car

Rented cabin



ACTIVITIES

Relaxation

Sunbathing & swimming

Hiking

Visit the countryside

Experience mountains, wildlife

Get pampered

TRAVEL COMPANIONS

Less with friends

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. IT HAS TO BE WELL ORGANIZED, PRACTICAL AND PREDICTABLE.

People who make rational choices
People who prefer the familiar over the unknown

Gives me a safe feeling

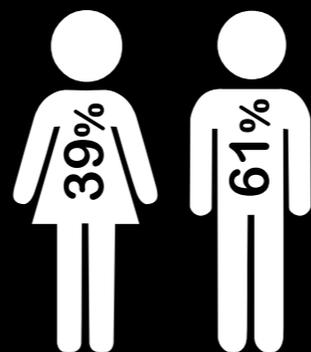
Avoid surprises **People who avoid risk**

Keep everything under control

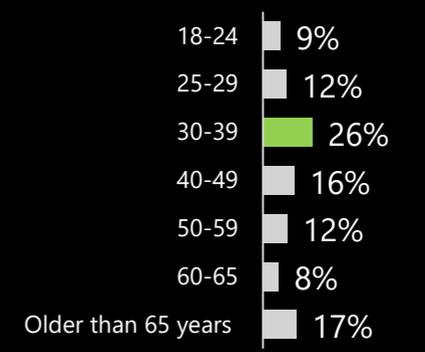
Practical **Not too warm**
Good service

Predictable **Well organized**
Structured Easy to travel to

41%
ARE BETWEEN
30-49 YEARS



**SHARE OF
OVERNIGHT
STAYS**
10%



CONTROL

TYOLOGY

Sport/active holiday

Ski holiday

Health travel

Event holiday

Organized tour



ACTIVITIES

More focused on a specific purpose

Less variety

INFORMATION SOURCE

Social media

Children



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.

People who are interested to learn

People who like to explore and have new experiences

Gives me rich & new experiences

Enriches my view on the world

Discover new & interesting places

Broadening my knowledge

Broaden my horizon

Rich cultural heritage

Explorative

Cultivated

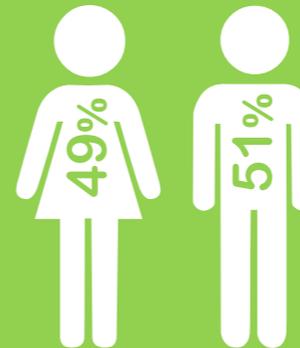
Authentic

Easy to travel to/around

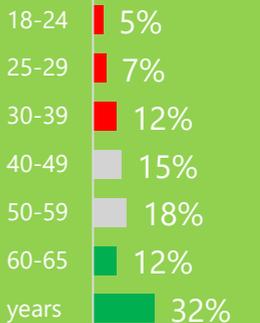
Interesting sights

Interesting culture & art

44%
ARE ABOVE
60 YEARS



SHARE OF
OVERNIGHT
STAYS
12%



BROADENING MY CULTURAL HORIZON

TYOLOGY

Visit historic sites

Cultural experience (arts, theatre, etc.)

With train & bus

City break

INFORMATION SOURCE

Homepage destination, attractions & sights

Guidebooks

Catalogues, brochures

Ipsos Marketing



ACTIVITIES

Visit historical buildings, cities, museums, parks, art exhibitions, etc.

Discover local culture & lifestyle, local history & legends

Experience local architecture

Attend concerts & festivals

TRAVEL COMPANIONS

Couples

Note: descriptives that are more important for this segment than for the other segments



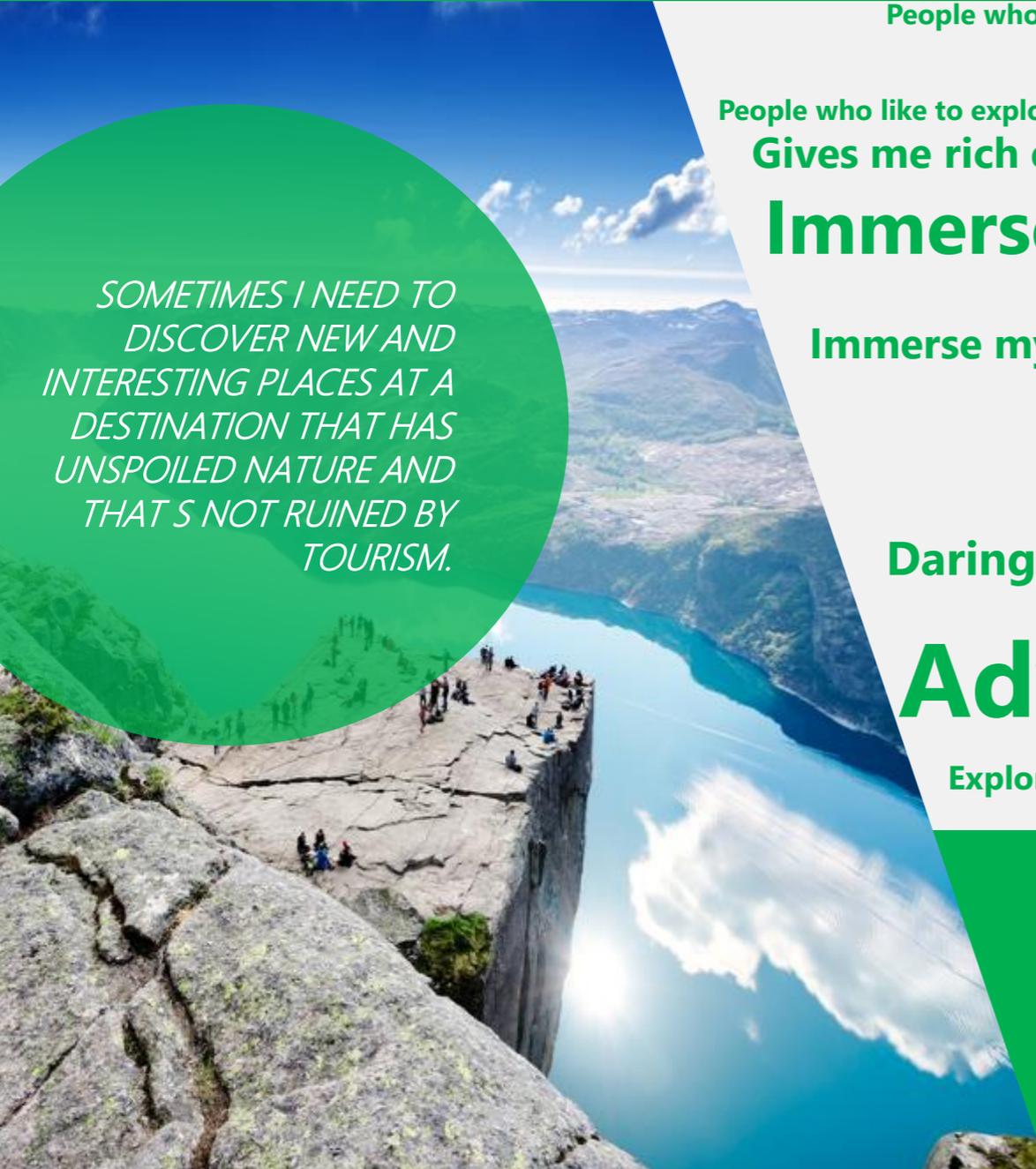
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

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.

People who like to do things the unconventional way

People who like adventure

People who like to explore and have new experiences

Gives me rich experiences

People who want to make a different choice

People who want a life changing experience

Immerse myself in local culture

Enriches my view of the world

Has beautiful nature

Immerse myself in local culture

Not ruined by tourism

Has unspoiled nature

Daring

Authentic

Allows me to live close to nature

Unique

Has quiet environments

Adventurous

Has interesting sights

Has good opportunities to meet local people

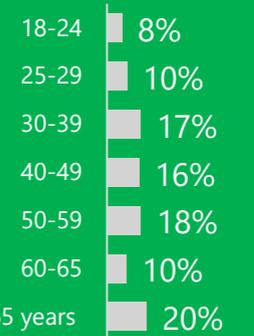
Explorative

Has rich cultural heritage

51%
ARE BETWEEN
30-59 YEARS



SHARE OF
OVERNIGHT
STAYS
15%



ADVENTURES IN THE WORLD OF NATURAL BEAUTY

TYOLOGY

Holiday to experience nature, scenery & wildlife

Sports/active holiday

15+ days

Rented Car

Budget hotel, guest house

INFORMATION SOURCE

Homepages destination, attractions, sights, carriers

Guidebooks

Reviews

Ipsos Marketing



ACTIVITIES

Observe beauty of nature, natural phenomena

Experience mountains, wildlife

Discover local history & legends

Visit the countryside

Hiking

Experience local architecture, national festivals, etc.

TRAVEL COMPANIONS

Couples

Alone

Note: descriptives that are more important for this segment than for the other segments



EXTRAVAGANT INDULGENCE

EXTRAVAGANT
AND SUPERIOR

SOPHISTICATED
AND CLASSY

Extravagant Indulgence 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.

Sophisticated & classy people

People who like to have the best things, value high quality

People who want the best and are willing to pay for it

Feeling on top of the world

Indulge myself with a bit of luxury

Variety of restaurants

Superior

Unique

Extravagant

Romantic spots

Well organized

Good service

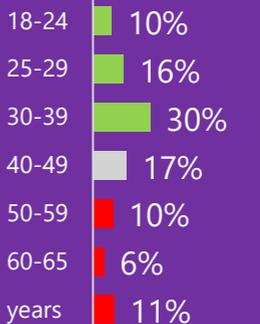
Classy

Good shopping

56%
ARE BELOW
40 YEARS



SHARE OF
OVERNIGHT
STAYS
12%



EXTRAVAGANT INDULGENCE

TYOLOGY

Culinary trip
Party & fun
Ski, sports/active holiday
Health travel
Events
Cruise

High budget hotels
Organized tour



ACTIVITIES

Spa resorts
Amusement parks

INFORMATION SOURCE

Social Media
Magazines



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.

People who want to have as much fun as possible
Gives me new inspiration
Helps me enjoy life to the fullest
Creates precious moments of togetherness
Adventurous people
People with an active & busy social life

Feeling full of energy

Allows me to be physically active
Offers a wide range of possible activities
Has activities for kids

Active

Adventurous
Explorative

24%
ARE BELOW
30 YEARS



SHARE OF
OVERNIGHT
STAYS
9%



ENERGY

TYOLOGY

Sports, active holiday

Ski holiday

Party & fun

Other winter holiday

Own car

Rented cabin, holiday home

INFORMATION SOURCE

Friends/acquaintances/
colleagues

Children 0-14

Ipsos Marketing



ACTIVITIES

Hiking more than 2 hours

Winter activities

Visit amusement parks

TRAVEL COMPANIONS

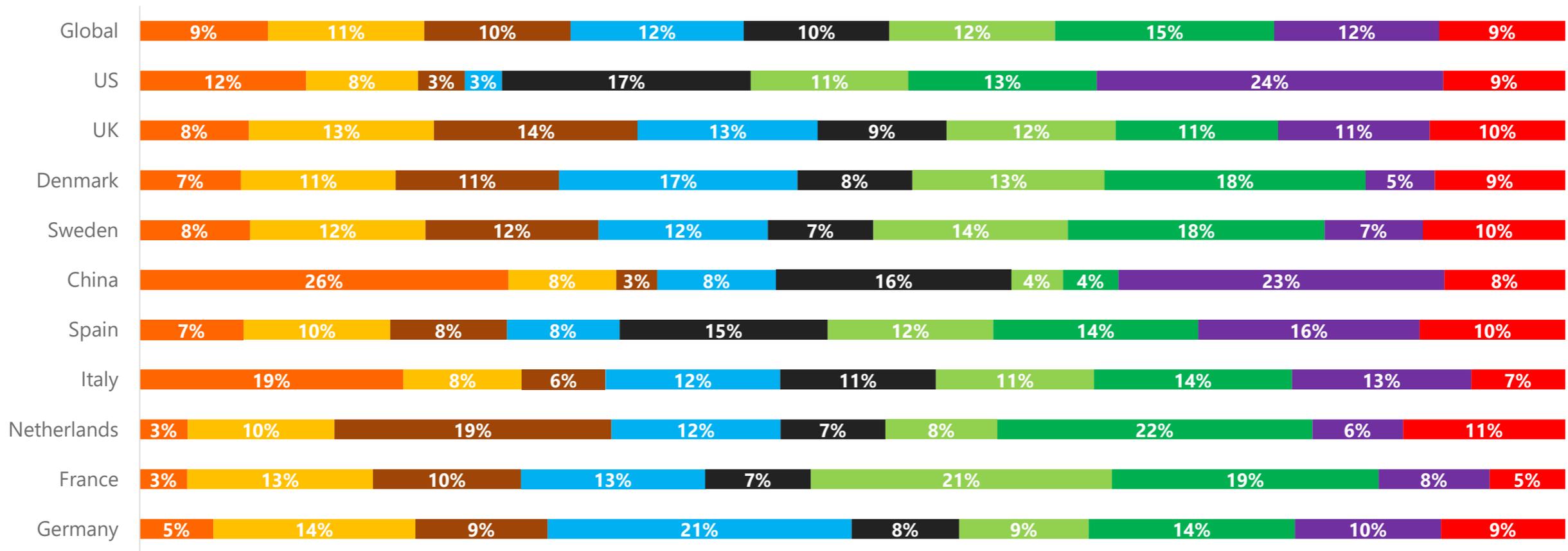
Bigger groups

Children 0-14

Friends

Note: descriptives that are more important for this segment than for the other segments

SEGMENT SIZE* PER MARKET – LARGE LOCAL DIFFERENCES



- 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.

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

Norway does not have a very strong emotional footprint. It lacks a clear reason why at least outside of Sweden & Denmark. In these last two countries Norway is associated with no surprises and a safe feeling as well as energizing.

People are generally very clear on what to expect in terms of functional delivery: unspoiled nature, isolated, well organized and generally safe

SOCIAL IDENTITY

Norway does not have a consistent strong global footprint when it comes to social identity.

For Sweden and Denmark, Norway is the destination for people who prefer the familiar over the unknown.

But across more distant markets Norway is seen as a destination for people who like adventure and to explore. People who like to have the best things, who value high quality.

BRAND PERSONALITY

Across most countries Norway is seen as peaceful & fresh. More distant markets see Norway as more adventurous, more for explorative people.

For Denmark and Sweden it's more predictable & practical.

For none of the markets is Norway seen as very lively, playful or social. It's not a place for extravagance and partying. It also lacks sophistication – not authentic, not cultivated.

Who
am i?



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

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

SOME CHANGES IN THE GERMAN MARKET

Germans generally have much of the same association to Norway as in 2011, BUT this time Norway is seen to have more friendly people and better satisfy Germans needs to broaden their knowledge.

Norway's personality is also seen as more cultivated and open-minded than in 2011.

Top 5 emotional benefits

1. Allows me to discover new and interesting places
2. Gives me rich experiences
3. Helps me to escape from my hectic daily life
4. Allows me to broaden my horizon
5. **Allows me to broaden my knowledge**

Top 5 destination characteristics

1. Has beautiful nature
2. Allows me to live close to nature
3. Is not too warm
4. Has unspoiled nature
5. **Has friendly people**

Top 5 personality items

1. Friendly
2. Peaceful
3. Authentic
4. Active
5. **Cultivated and Open-minded**

SOME CHANGES IN THE DUTCH MARKET

The Dutch have the same emotional and functional association to Norway as in 2011.

Top 5 emotional benefits

1. Allows me to discover new and interesting places
2. Gives me rich experiences
3. Helps me to escape from my hectic daily life
4. Allows me to broaden my horizon
5. Enriches my view on the world

Top 5 destination characteristics

1. Has beautiful nature
2. Has unspoiled nature
3. Has quiet environments
4. Is not too warm
5. Allows me to be physical active

Top 5 personality items

1. Active
2. Adventurous
3. Peaceful
4. **Relaxed**
5. **Daring, Authentic and Friendly**

BUT Norway's personality has evolved. Norway is seen as more relaxed, daring, authentic and friendly than in 2011.

5

THE COMPETITIVE LANDSCAPE

Visits and repeat visits

Strengths and weaknesses

NORWAY'S ANCHOR POINT IN THE CATEGORY FRAME SUGGEST A CLOSE CONNECTION TO THE GREEN DIMENSION

Hence at a global level Innovation Norway should focus their effort on the south cone of the frame



THE NORWAY BRAND POSITIONING ANCHOR POINT

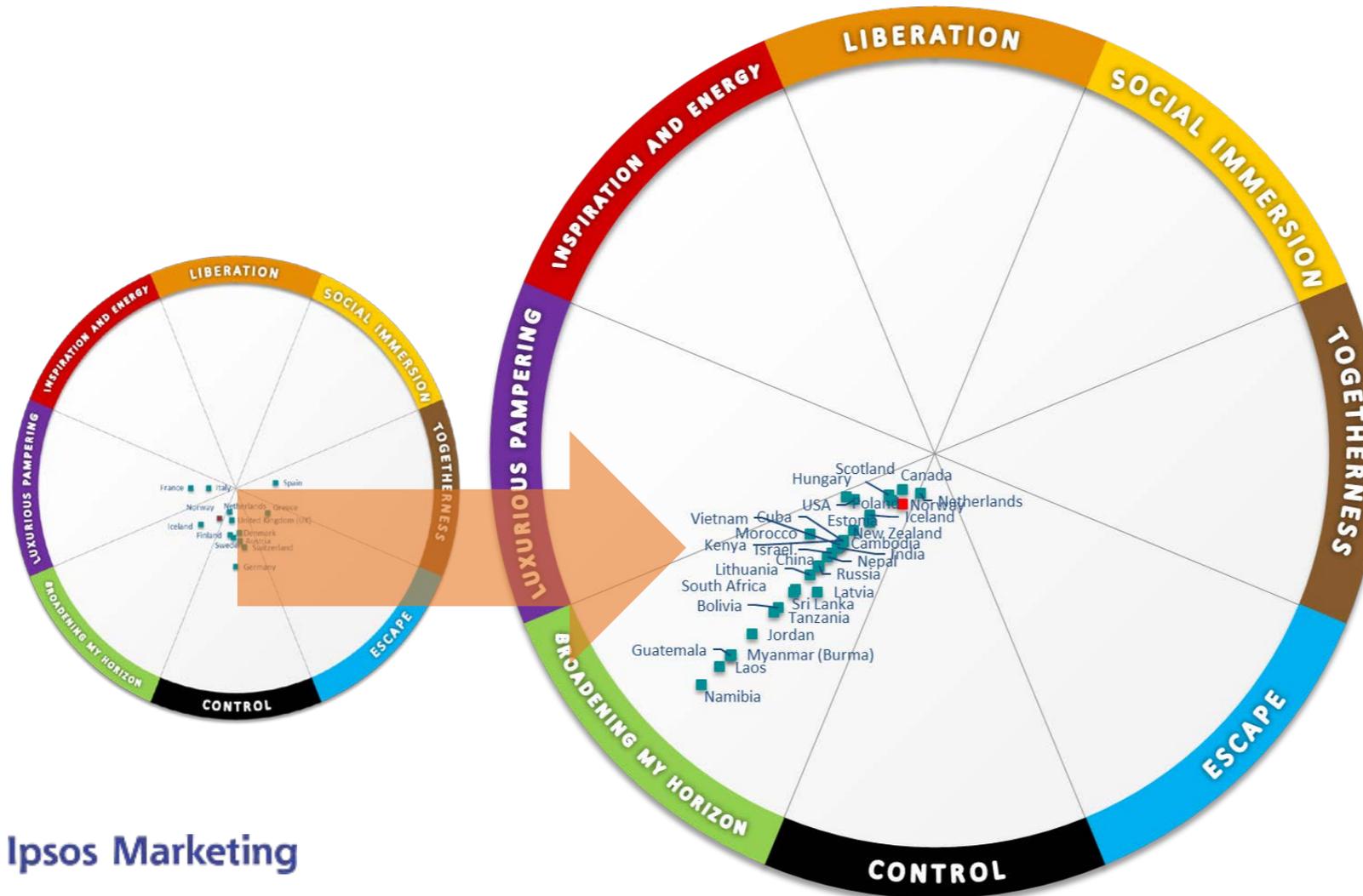


WHAT THIS WILL TELL YOU:

- The most common association to Norway is, for most of the markets, related to the needs in the green dimension.
- There will be local market differences so please refer to local country reports, when assessing Norway's position in each specific market.

LOOKING OUTSIDE NORWAY'S TRADITIONAL COMPETITIVE SPACE, YOU WILL FIND OTHER DESTINATIONS COMPETING FOR THE SAME NEEDS

THE NORWAY BRAND POSITIONING ANCHOR POINT



WHAT THIS WILL TELL YOU:

- There are the traditional “winter” competitors like Canada.
- But you also have many destinations in Africa, South America and South East Asia competing for the same position as Norway.

OVERVIEW DESTINATIONS

Perfect fit (>0,60)
Good fit (0,10 to 0,60)
Neutral fit (-0,10 to 0,10)
Negative fit (-0,20 to -10)
Very negative fit (<-0,20)

	Broadening My Cultural Horizon	Extravagant Indulgence	Escape	Adventures in the World of Natural Beauty	Sharing & Caring	Control	Energy	Playful Liberation	Social Immersion
Austria	0,03	-0,04	0,07	-0,25	0,08	0,30	-0,08	-0,08	-0,19
Canada	-0,06	0,00	0,03	0,34	-0,29	0,04	0,10	-0,04	-0,12
China	0,26	0,11	-0,25	0,36	-0,37	-0,14	-0,06	-0,14	0,05
Croatia	-0,10	-0,28	0,29	-0,13	0,29	-0,13	0,06	0,06	0,13
Czech Republic	0,24	-0,19	-0,10	-0,14	0,10	0,07	-0,04	0,00	0,17
Denmark	0,08	-0,14	0,11	-0,14	0,06	0,25	-0,15	-0,05	-0,02
Finland	0,03	-0,14	0,22	0,22	-0,17	0,06	-0,05	-0,01	-0,15
France	0,09	0,32	-0,15	-0,48	0,13	0,12	-0,16	-0,01	-0,13
Germany	0,08	0,09	-0,30	-0,42	0,05	0,64	-0,17	-0,08	-0,15
Iceland	0,03	-0,11	0,17	0,61	-0,40	-0,21	0,12	0,00	-0,14
Italy	0,02	0,15	-0,06	-0,45	0,25	-0,07	-0,08	0,11	0,04
Netherlands	0,16	-0,16	-0,15	-0,25	0,11	0,24	-0,04	0,03	0,17
New Zealand	-0,07	0,02	0,10	0,63	-0,43	-0,27	0,19	0,00	-0,13
Norway	0,06	-0,13	0,22	0,28	-0,22	0,03	-0,03	-0,06	-0,16
Portugal	-0,06	-0,20	0,14	-0,35	0,40	0,01	-0,01	0,05	0,17
Scotland	0,17	-0,33	0,23	0,31	-0,09	-0,12	-0,02	-0,12	0,06
South Africa	0,08	0,02	-0,04	0,57	-0,32	-0,34	0,06	-0,10	0,04
Spain	-0,20	-0,04	0,02	-0,48	0,37	0,12	0,10	0,22	0,05
Sweden	0,05	-0,06	0,17	0,06	-0,10	0,16	-0,14	-0,06	-0,11
Switzerland	-0,05	0,32	0,03	-0,21	-0,10	0,33	-0,18	-0,09	-0,37
Thailand	-0,17	0,01	0,15	0,10	0,02	-0,34	0,14	0,20	0,11
Turkey	-0,03	-0,13	-0,03	-0,06	0,19	-0,12	0,17	0,01	0,10
USA	-0,07	0,42	-0,49	-0,02	-0,28	0,05	0,21	0,10	-0,11

6

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

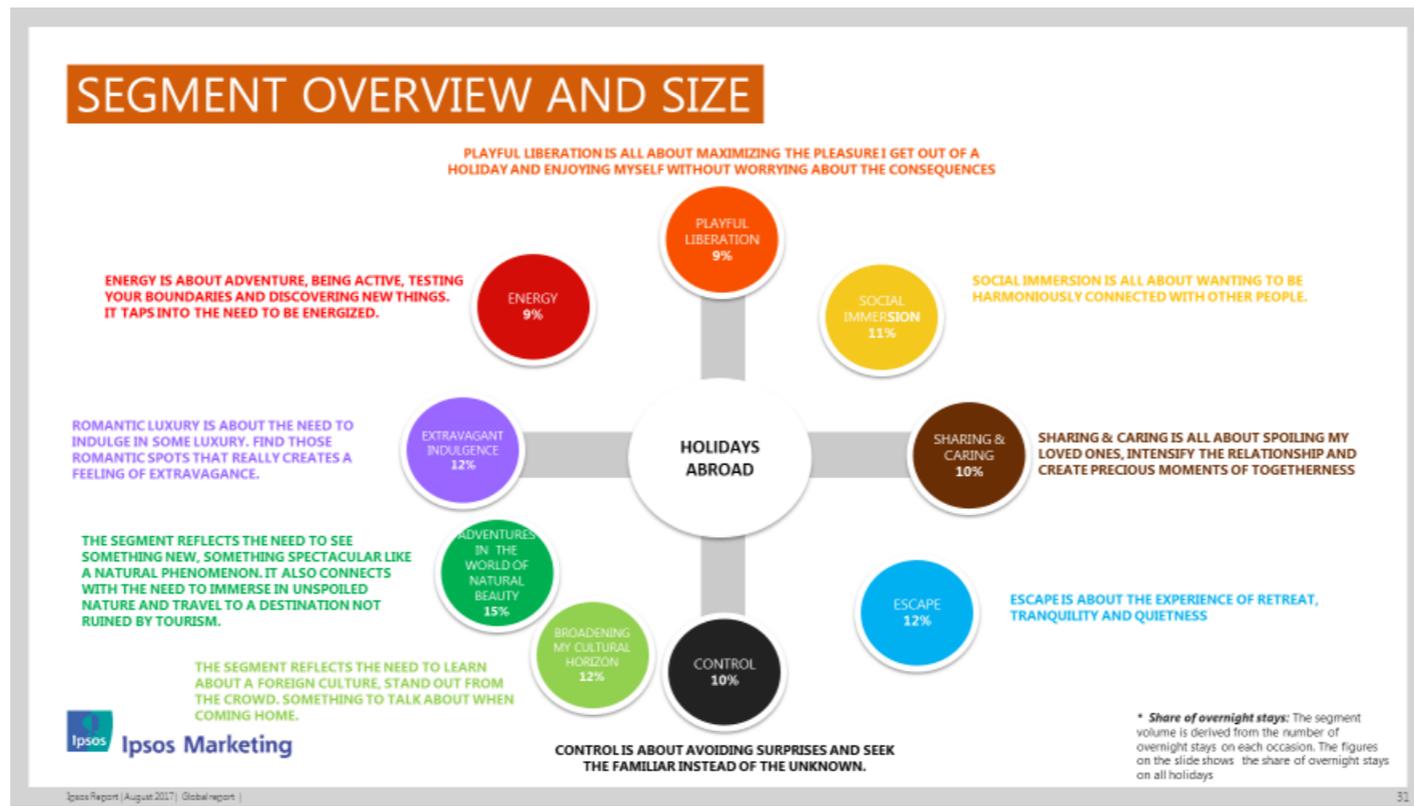
4

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

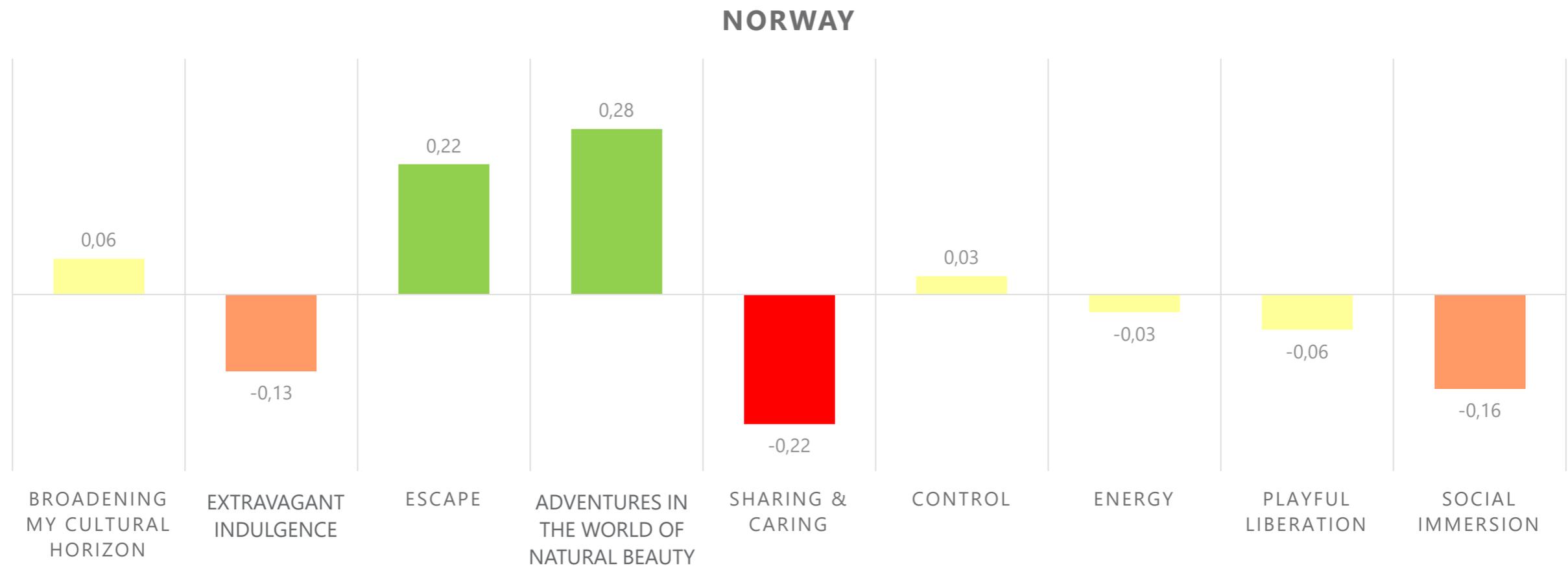
TOP 3 (% overnight stays*)

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.

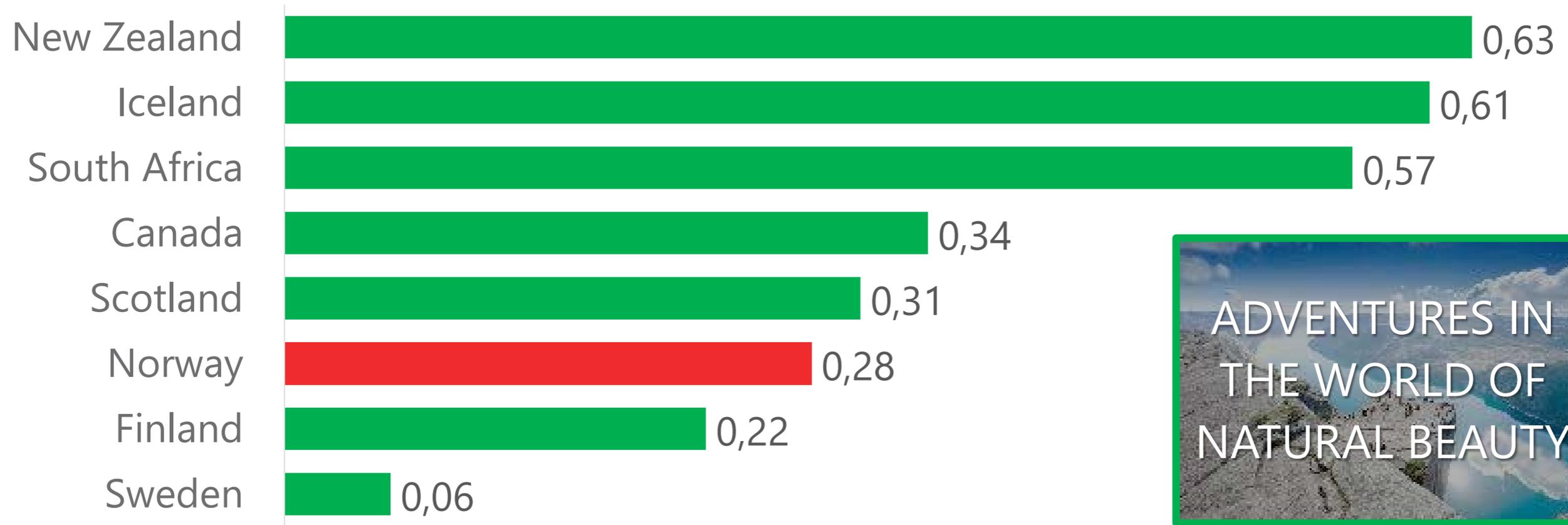
NORWAY CONNECTS WELL WITH MULTIPLE NEEDS

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



DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Nature is a highly competitive area



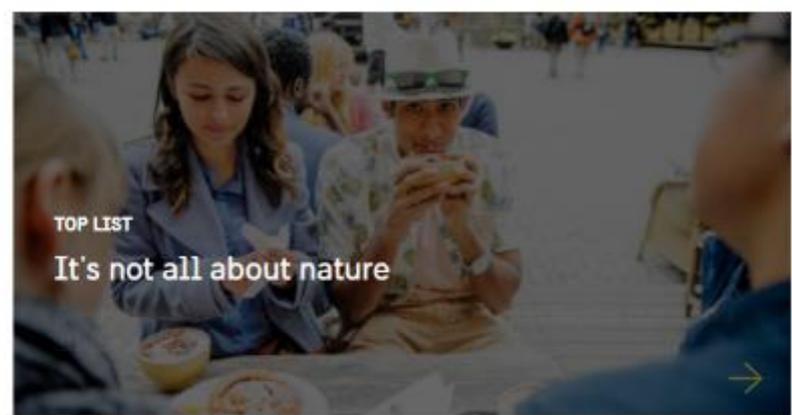
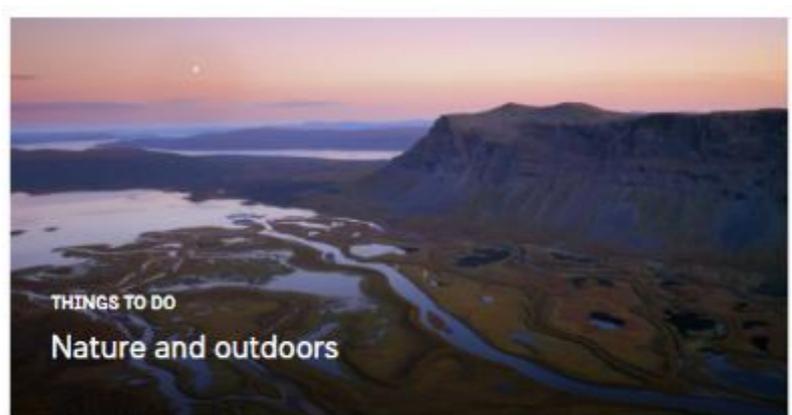
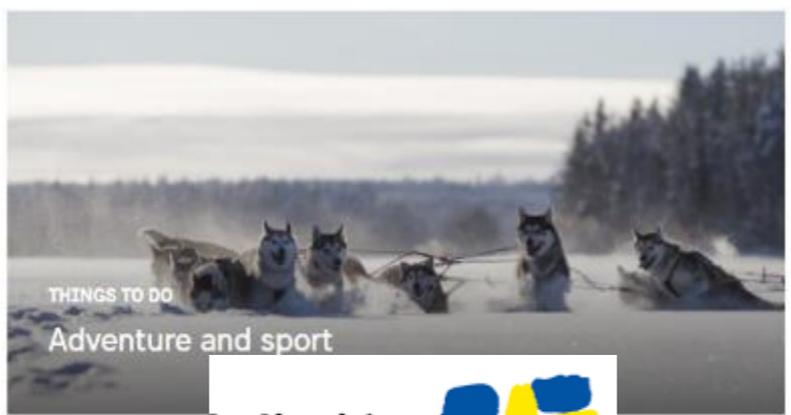
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs

The screenshot shows the homepage of the '100% PURE NEW ZEALAND' website. The header includes navigation links for 'Destinations', 'Things to do', 'Facts', 'Travel to NZ', 'Recommended trips', 'Transport', and 'Accommodation'. A large hero image features a blue helicopter flying over a scenic lake and forested hills. A play button icon is overlaid on the hero image, and the word 'LUXURY' is written in large white letters at the bottom. Below the hero image, there are several smaller images with text overlays and arrows pointing to the right, representing different luxury experiences: 'Top luxury experiences', 'New Zealand's Marquee Golf Courses', 'Exclusive Walking and Hiking', 'World-class Wine and Cuisine', 'Private Fly Fishing', and 'Super yacht cruising'. Each image shows a different aspect of New Zealand's natural beauty and luxury offerings.

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

Where do we go from here?

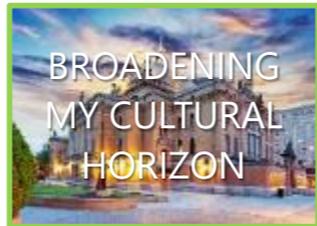
LOOKING AT NORWAY'S CURRENT STRENGTHS

AND POSITION DIFFERENT ROUTES THAT CAN BE EXPLORED

THE OBVIOUS TARGET



Especially for Sweden and Denmark, but not alone. It has to be in combination with another segment motivation.



Especially for the US this is an important segment; Norway already delivering.



For many travelers Nordic destinations are seen as destinations to escape. Why can't Norway be a place to escape when Sweden and Denmark can?



No destination seems to be especially strong in this segment. It's a white space.

POSSIBLE ADDITIONS



Important for city breaks.



Norway already has a decent fit in Denmark.



An important segment in China & US.



An important segment in China & Italy.

NORWAY NEEDS TO CONTINUE TO WORK ON HOLIDAY BASICS

Norway fails to meet some basic holiday expectations in the category, i.e. across segments globally

IMPROVE/BE MORE OF

Good value for money

Interesting, rich cultural heritage or art

Social, friendly

Good local cuisine

SUSTAIN PERFORMANCE



Beautiful nature

Peaceful

For Explorers

QUESTIONS?

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