



# Optima report Germany

Short version

*Vi gir lokale ideer globale muligheter*

## Background to the Optima studies

- Over the years, Innovation Norway has conducted several Optima studies across different markets. The main objective of these studies is to get a better understanding of Norway's key markets. This insight is used in both marketing and product development to be able to work more efficient and targeted
- This study is conducted using Censydiam, a tool for identifying main motivations and needs for travelling abroad on holiday. The research also identify the role of holidays in people's life, their perception of Norway as a tourist destination and the competitive landscape. We have also defined a target group for Norway based on this research
- The research was conducted in Germany, Russia (Moscow and St. Petersburg) and the Netherlands in 2011/2012.
- We have conducted four focus groups and 1,200 web interviews in each country with respondents that have been on holiday abroad during the last two years.

***For more info about the survey:***

<http://www.innovasjon Norge.no/Reiseliv/Markedsdata/Optima-Nederland/>

## Executive summary

- Fundamental meaning of going on holiday - Holidays abroad must always help people to escape from their daily lives! The core of all holidays is about escapism, discovering new and interesting places and being together. All holidays must fulfil these criteria regardless of the type of holiday
- The proportion of people who have ever visited Norway is low compared to neighboring countries. However Norway is the most frequently considered Scandinavian holiday destination in Germany. This demonstrates that Norway has unrealized potential
- All the Scandinavian countries are seen as expensive and to have environmentally friendly offers. Norway is also seen have unspoilt nature, natural phenomenon and wilderness. Norway is seen to be less social than Sweden and Denmark
- Norway does not have a good fit with any of the motivational segments identified in the study, but is best positioned in the exploration and broadening my horizon segment.
- The main target group for Norway is Explorers. They are looking to discover new territories and gain new energy. At the same time, broadening their horizons and feeling enriched.

## Fundamental meaning of going on holiday

In the research, we found that there are some common denominators across all types of holidays and across all segments and markets:

**Holidays abroad must always help you to escape from your daily life!**

The core of all holidays is about:

**Escapism**

**New and  
interesting  
places**

**Being together**

All holidays must **always** fulfill these criteria irrespective of the type of holiday – Then we can start looking into how we should position Norway to be unique, relevant and attractive (in relation to our competitors)

Why identifying main motivation for travelling?

## 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**.



Why identifying main motivation for travelling?

To get inside the consumer's mind,  
we need to go **deeper**

**20% Conscious**

**80%** Sub-conscious

80% of human behaviour is explained by the sub-conscious. We therefore need to use methods that enable us to dig deeper into consumers' minds, to identify those layers of information that really govern human behaviour.

This is why we have chosen the Censydiam model for this project.

*The Censydiam model*

## Main motivation for travelling abroad

We have identified eight motivational segments.  
They represent the different basic motivations for why people go on holidays.



# Norway is best positioned with Exploration and Broadening my horizon



- Norway does not clearly 'own' any motivational segment
- Versus key competitors, Norway is not doing well on Togetherness
- Norway does have a leading position in Exploration and Broadening my Horizon, and our key competitors also have a weak association for these 2 segments
- Across the other markets researched Norway is also often associated with Exploration and Broadening my Horizon
  - ⇒ But the strength of this association for Norway is also relatively weak
  - Exploration:
    - Emotional benefits sought by the tourist: Gives me rich experiences, Discover new and interesting places, Escape from my hectic daily life and Enrich my view of the world
    - Personality of the destinations: Adventurous, Explorative, Unique, Active and Friendly
  - Broadening my Horizon:
    - Emotional benefits sought by the tourist: Discover new and interesting places, Broaden my horizon, Broaden my knowledge, Enrich my view of the world and Rich experiences
    - Personality of the destinations: Friendly, Authentic, Open-minded, Relaxed and Cultivated



# Versus key competitors, Norway is not doing well on Togetherness, but does have a leading position in Exploration and Broadening my Horizon.

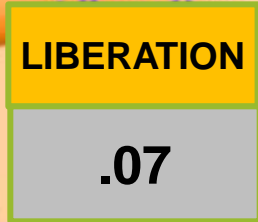
## Perceptual Fit with segments – Norway (in Germany)

Austria (-.08)  
Sweden (.27)  
Denmark (.12)

Fit (from -1 to +1) of the perceptual profile of Norway with what each of the segments are looking for. A score of 1 means that Norway delivers exactly what the segment is looking for; a score of -1 means Norway represents the exact opposite of what people are looking for in that segment.

Perfect fit (>0,60)
Good fit (0,30-0,60)
Neutral fit (-0,25-0,29)
Negative fit (<-0,25)

Austria (-.56)  
Sweden (-.13)  
Denmark (-.39)



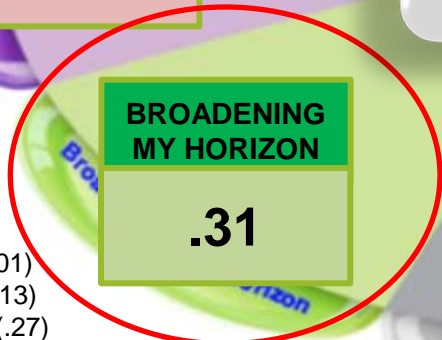
Austria (.22)  
Sweden (.08)  
Denmark (.27)

What we do here is allocate people's perception of Norway to their dominant idea of each segment. The slide shows a index number that indicates the fit between Norway and each segment compared with competitors

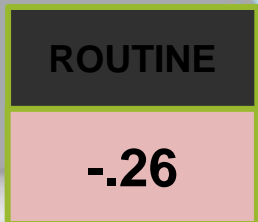


Austria (.53)  
Sweden (.55)  
Denmark (.81)

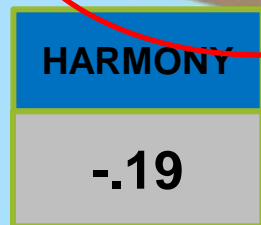
Austria (-.41)  
Sweden (-.39)  
Denmark (-.67)



Austria (-.01)  
Sweden (.13)  
Denmark (.27)



Austria (.58)  
Sweden (-.02)  
Denmark (.30)

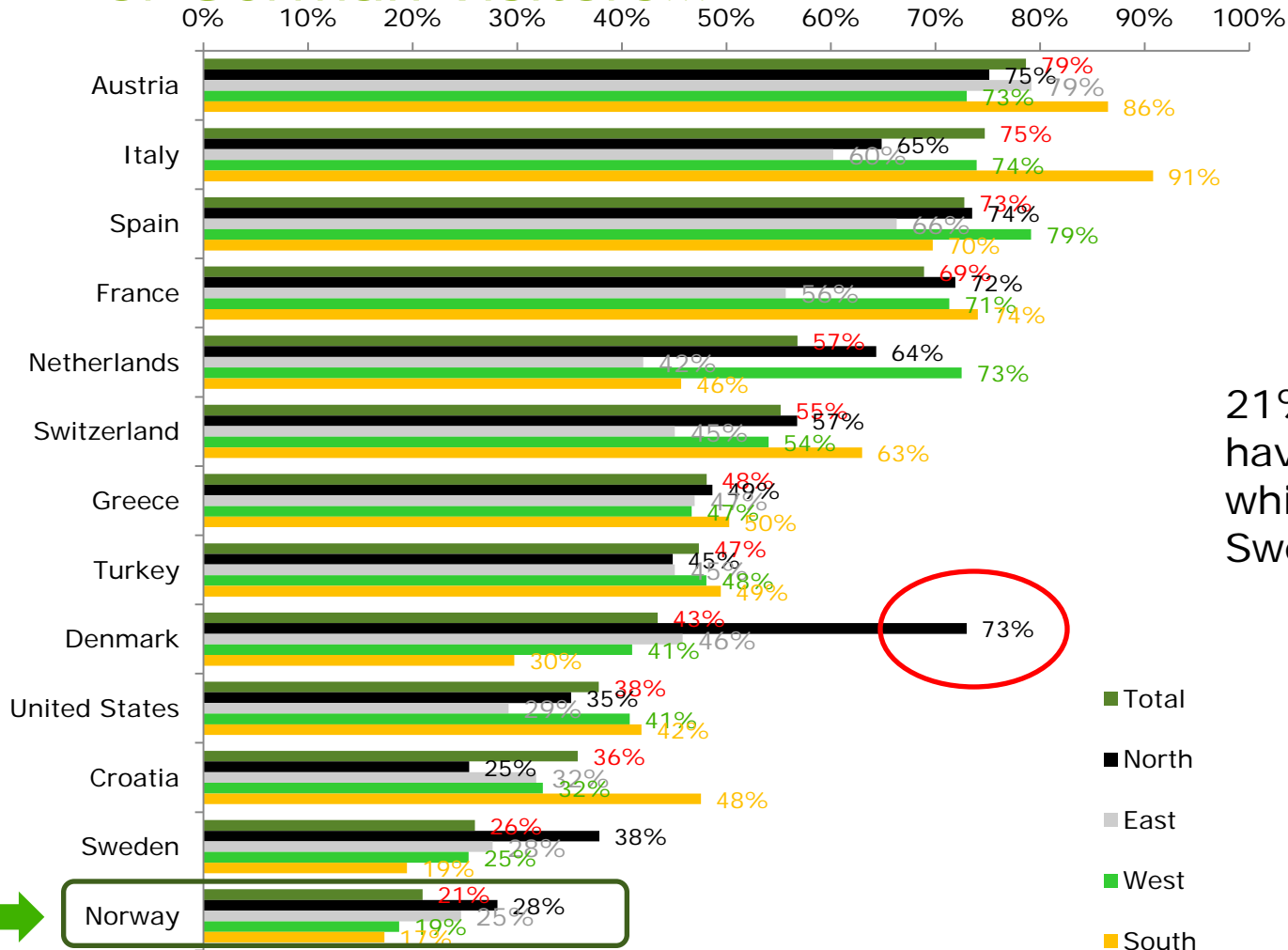


Austria (.35)  
Sweden (.08)  
Denmark (.21)

Perceptual fit

## Visited destinations from Germany

Regional differences but Norway fails to attract a lot of German visitors...

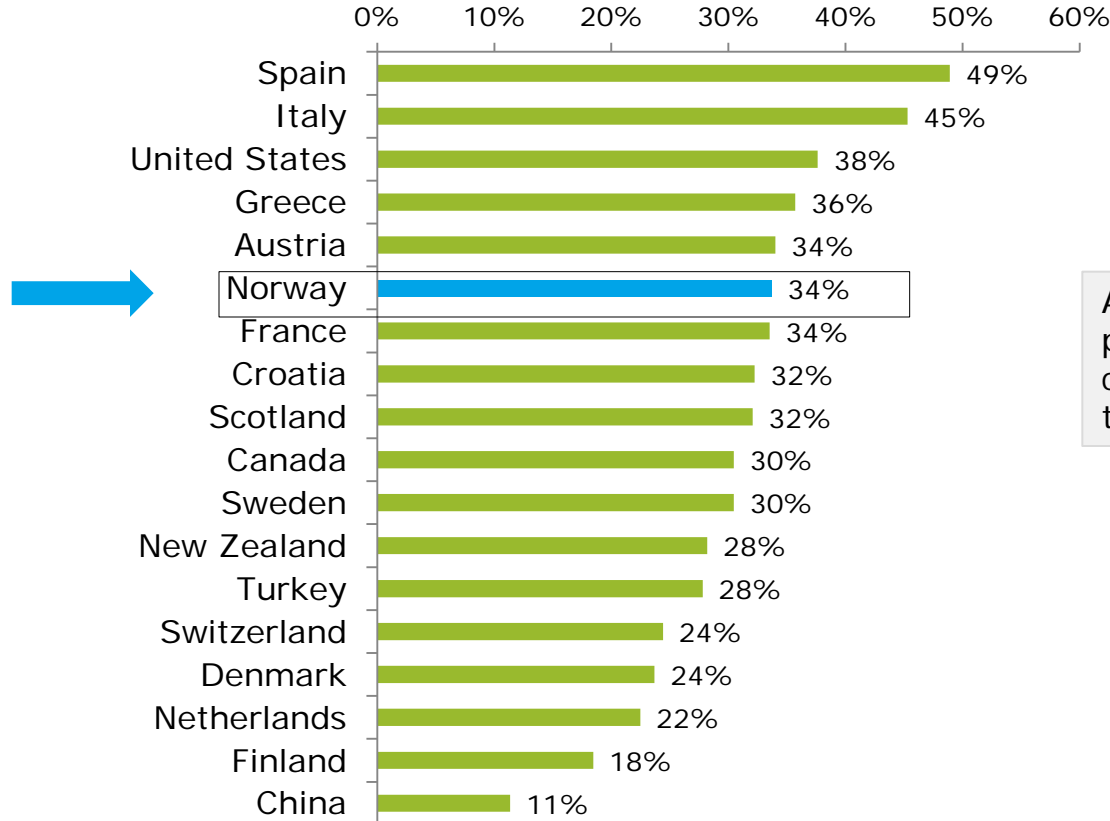


21% of the Germans have visited Norway, which is lower than for Sweden and Denmark.

*Considered destinations in Germany*

## ...but Norway is on their consideration list – and it is the most frequently considered Nordic country

*Which of the following countries would you consider going on holiday to (any kind of holiday) the next three years?*



A lot of unlocked potential: 6th on the considered list, 13th on the actually visited list

# The German's perception of Norway as a holiday destination

This is irrespective of segments or what type of holiday in Norway they prefer or consider

## DESTINATION FEATURES

(functional)

- Has beautiful nature
- Has nature that offers opportunities for discovery
- Is not too warm
- Has unspoiled nature
- Has quiet environments

## ACTIVITIES

(functional)

- Observe the beauty of nature
- Observe natural phenomenon (i.e. northern lights, midnight sun, breaking waves etc)
- Experience the wilderness
- Do winter activities (dog-sleigh, snowmobile etc.)
- Visit the countryside

## EMOTIONAL BENEFITS

(emotional)

- Allows me to discover new and interesting places
- Helps me to escape from my hectic daily life
- Gives me rich experiences
- Allows me to broaden my horizon
- Enriches my view of the world

## PERSONALITY

(emotional)

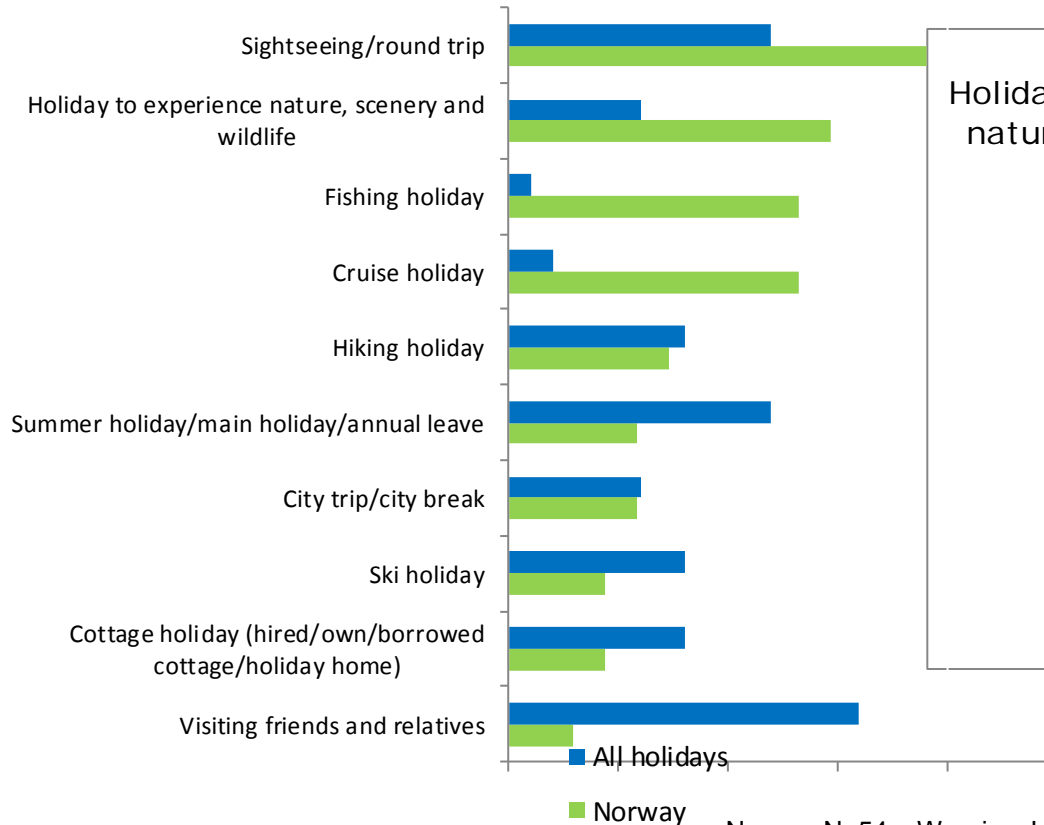
- Peaceful
- Friendly
- Authentic
- Active
- Soothing

# Travel behavior vs. perception of Norway

Norway is mostly associated with holidays to experience nature. In terms of actual behavior sightseeing/round trip is the most important holiday type.

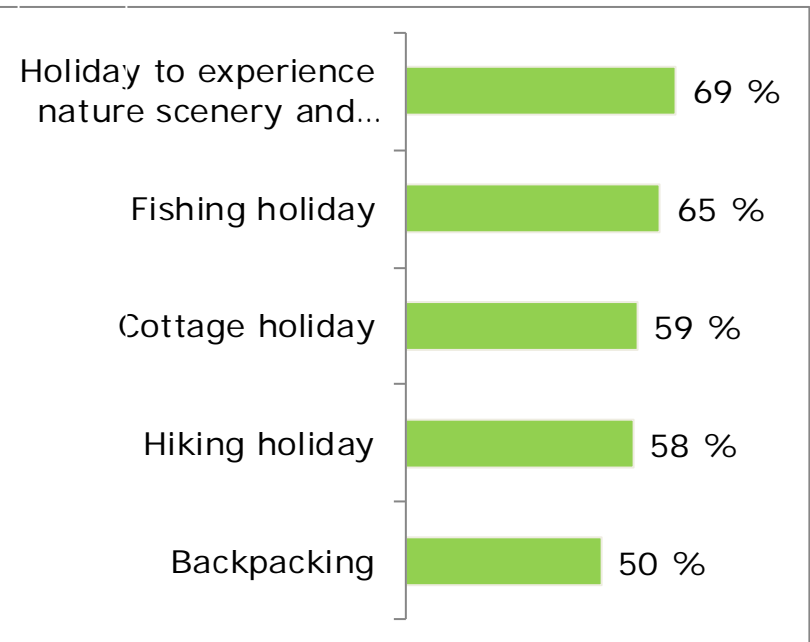
## BEHAVIOUR

- How the Germans travel



## PERCEPTION

- Suitable for Norway as a destination



Norway N=54 – Warning: Low sample size for trips to Norway

All holidays & Perception N = All holidays to any destination in the quantitative sample

# Norway delivers pretty well on the emotional level

What German tourists want in general:

## Emotional Benefits (for the tourist)

Allows me to share good times with others
Helps me to escape from my hectic daily life
Allows me to discover new and interesting places
Gives me rich experiences
Creates precious moments of togetherness

How Norway delivers (based on how they see Norway):

→	✘	Norway does not deliver very well
→	😊	Norway delivers well
→	😊	
→	😊	
→	✘	

## Personality (for Norway)

Friendly
Relaxed
Harmonious
Active
Peaceful

→	😊
→	✘
→	✘
→	😊
→	😊

# Norway does not deliver on the functional level

What German tourists want in general:

## Product characteristics (for Norway)

Has friendly people
Has beautiful nature
Has interesting sights
Offers a wide range of activities
Is easy to travel around



How Norway delivers (based on how they see Norway):

Norway does not deliver very well

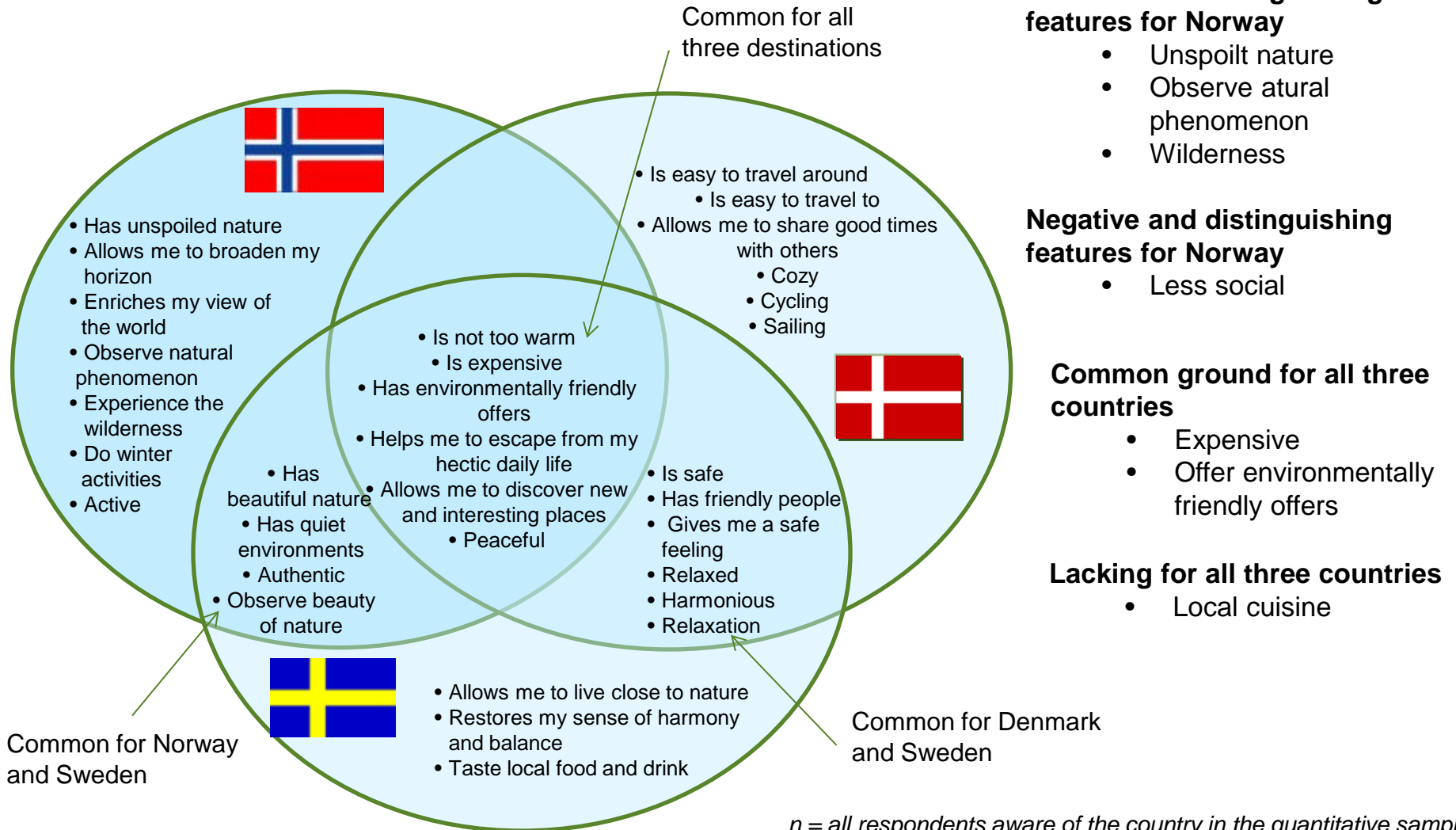
Norway delivers well

## Activities (in Norway)

Taste local food and drink
Relaxation
Visit restaurants
Observe the beauty of nature
Visit cities

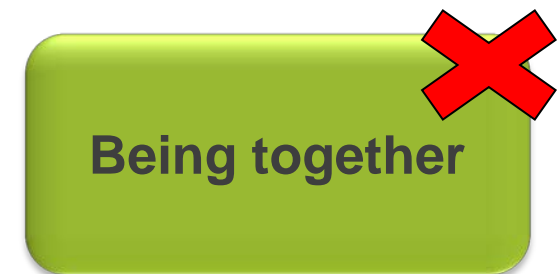


# Competitor analysis - Comparison between Norway, Denmark and Sweden





## How do Norway meet generic expectations for holidays?



Norway mostly meet these expectations, except the social element

## Meet the expectations people have for all types of holidays

We must address the basic expectations that Germans have when going on holiday, including basic comfort, a more social experience and more cultural content.

### Areas for improvement to meet hygiene expectations



#### **A comfortable experience**

- Easy travel experience
- Easy booking
- Visualising the trip: knowing how to travel, where to go



#### **A social experience**

- Communicate lively towns & villages
- 'Populate' the isolated scenes
- Isolation as a choice, not a given
- It is not like home!
- E.g. stories about Dutch people moving to Norway for a change of lifestyle?



#### **Good food, drink and local culture**

- Talk about local food & drink traditions
- Interesting sights and local culture

## Our target group: **Explorers**

### **What they look for:**

Norway's target group is explorers. Their main motivation for travelling is to explore new territories; nature, culture, local life, food and traditions. They also want to gain new energy and to broaden their horizon.

### **Who are they:**

They tend to have higher education, are seasoned travellers, technology savvy and travel without children.



Within this target group there are two sub segments:



### **Active explorers:**

This group tends to favour physical active experiences in nature such as hiking, cycling, fishing etc and are. They are usually found in markets closer to Norway.

### **Curious explorers**

This group seeks more cultural content in addition to nature experiences and favour sightseeing, roundtrips, city trips. They look to increase their cultural capital.