



Danish winterholiday

Censydiam – Quantitative report
Workshop Copenhagen March 23, 2012

Prepared for Innovation Norway
Prepared by Ipsos

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Getting started

Background



HOW TO BEST
SHARPEN THE
FUTURE OF THE
VISIT NORWAY
BRAND?

UNDERSTANDING
THE COMPETITIVE
LANDSCAPE AND
TARGETING NEEDS
TO DRIVE
INNOVATION AND
COMMUNICATION

Central Question for Innovation Norway



COMMUNICATION

Evaluate / Confirm current direction for Norway

DENMARK



PRODUCTS

Choose target for each holiday type

Trip with family

Trip with male friends

Trip with partner

Trip with a group of
friends

What have we done

We have created
qualitative hypothesis

4 focus groups in Denmark

We have
validated them quantitatively

1200 interviews in Denmark

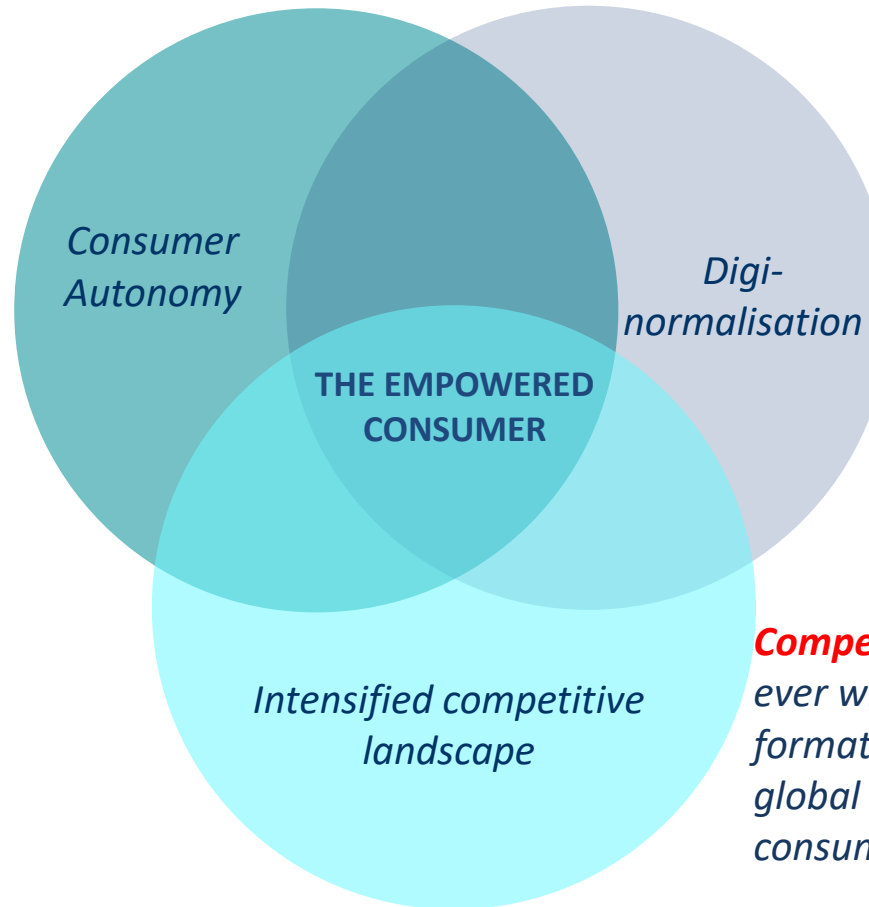
Getting started

Why Censydiam?



The drivers behind the changing marketing landscape

Consumer today are more **marketing savvy** & more self-reliant; they trust more than ever on their own judgement



New technology enables consumers to **take control** of the relationship with the brands (e.g. price check app, blogs, twitter, etc.)

Competition is fiercer than ever with new retail formats, online shopping, global access, etc. giving the consumer more choice

How can brands continue to be relevant in the future?

1. Play a **meaningful** role in people's lives
2. From claim to **demonstrate**
3. **Act human**, not corporate
4. Be a **responsible citizen**
5. **Keep it real** , don't fake it
6. **Be unique**, stand out, be noticed
7. **Interact** with your audience
8. Tell a **cohesive story**

Brands are answers to deep human needs



*In the factory we
make **cosmetics**;
in the drugstore
we sell*

Hope

Charles Revson,
creator of Revlon
Cosmetics



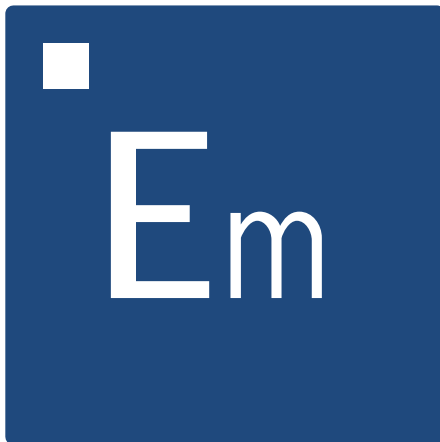
- The starting point of any brand research should not be the brand
- We have to dare to start from what we can do for our consumer rather than vice versa
- This may not be to most obvious path to growth, but in the long-term it is the only viable one*

* See for instance Jim Stengel, Grow (2011)

A holistic approach that marries EMOTION with SUBSTANCE



&



- To be truly meaningful and relevant, brands need to do more than connect with an emotional meaning only.
- They need to tap into a holistic experience, encompassing both emotional as well as functional drivers

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

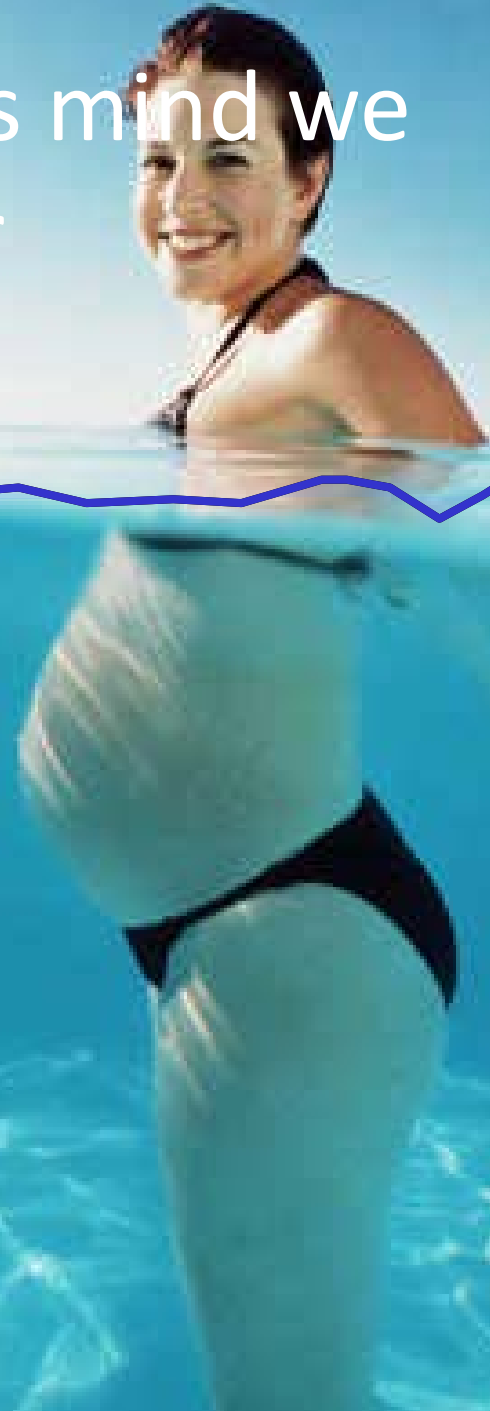
20% Conscious

80%

Sub-Conscious

“80% of human behaviour is explained by
the sub-conscious”

Harvard Business School:
Mind, Body, Behaviour Initiative



Having a compass or a map helps navigating in the land of motivations





THREE CORE BENEFITS

- **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 results

Understanding the Danish Market



General understanding of The Danish culture

The following key traits of Danish culture, life-style and economic environment are influential on the meaning & attitudes towards holidays:

The nucleus family is strongly established and esteemed in Danes' self perception

- The participants in this study generally believe that Danes form a strong nucleus family and that this is prioritized quite strongly in Denmark. Contrary to i.e. Southern Europeans Danes do not necessarily include the extended family (i.e. grandparents, uncles/aunts and cousins in the nucleus family)
- ☞ As a result Danes regard the holiday as an natural opportunity for the nucleus family to be together. It is perceived as “out of character” for Danes to go on holiday without the family



General understanding of The Danish culture

The following key traits of Danish culture, life-style and economic environment are influential on the meaning & attitudes towards holidays:

Danes feel that everyday living is highly structured and that there is little room for improvising and spontaneity

- There is consensus among the participants in this study that there is a strong demand to be effective and that working life, school and an active spare time put a strain on parents as well as kids
- *“We spend a lot of energy to make things oh so nice, so we have less time to relax and socialize. In Southern Europe they are better at hanging out I am sure” Female, 47*

☞ This results in an increased need to pull the plug and withdraw from everyday routines



General understanding of The Danish culture

The following key traits of Danish culture, life-style and economic environment are influential on the meaning & attitudes towards holidays:

There is a constant demand to prove one's achievements

- Danes experience that they are evaluated increasingly in a number of different areas and that it is necessary to succeed not only professionally but in all aspect of everyday life (leisure, family, sport, holiday etc.)
 - *"Holiday has almost become a sport. You want to go as often as possible and preferably as far away as possible" Female, 39*
 - *"Quality time can easily become feigned. Sometimes it has to look better on the outside than on the inside" Male, 43*
 - *"Kid can easily become marginalized if they do not go on holiday when their friends do" Female, 33*

☞ This reflects on the demands for holidays as holidays have become an increasingly important status symbol



General understanding of The Danish culture

The following key traits of Danish culture, life-style and economic environment are influential on the Meaning & Attitudes towards holidays:

“Hygge” is a fundamental value in Danish sociality

- While “hygge” has to do with both cosiness and relaxing, neither word captures the concept entirely. “Hygge” is fundamentally a state of mind. It is about warmth, friendliness, safety, and a sense of well-being; “hygge” is a time when you are at peace with yourself and your friends, family or acquaintances.
- “Hygge” is about creating an informal atmosphere, unwinding and relaxing. Conflict and different viewpoints are locked out for a while, because of the risk of spoiling the “hygge”. Often, to “hygge” means lighting candles and having plenty of food, snacks, wine, beer or coffee, whilst chatting informally, playing cards or just watching tv.
- *“‘Hygge’ with the family is typically Danish. We wind down with friends or family with a glass of wine and nice food” Male, 36*

☞ Danes expect holidays (with the family) to provide the right setting for “hygge”

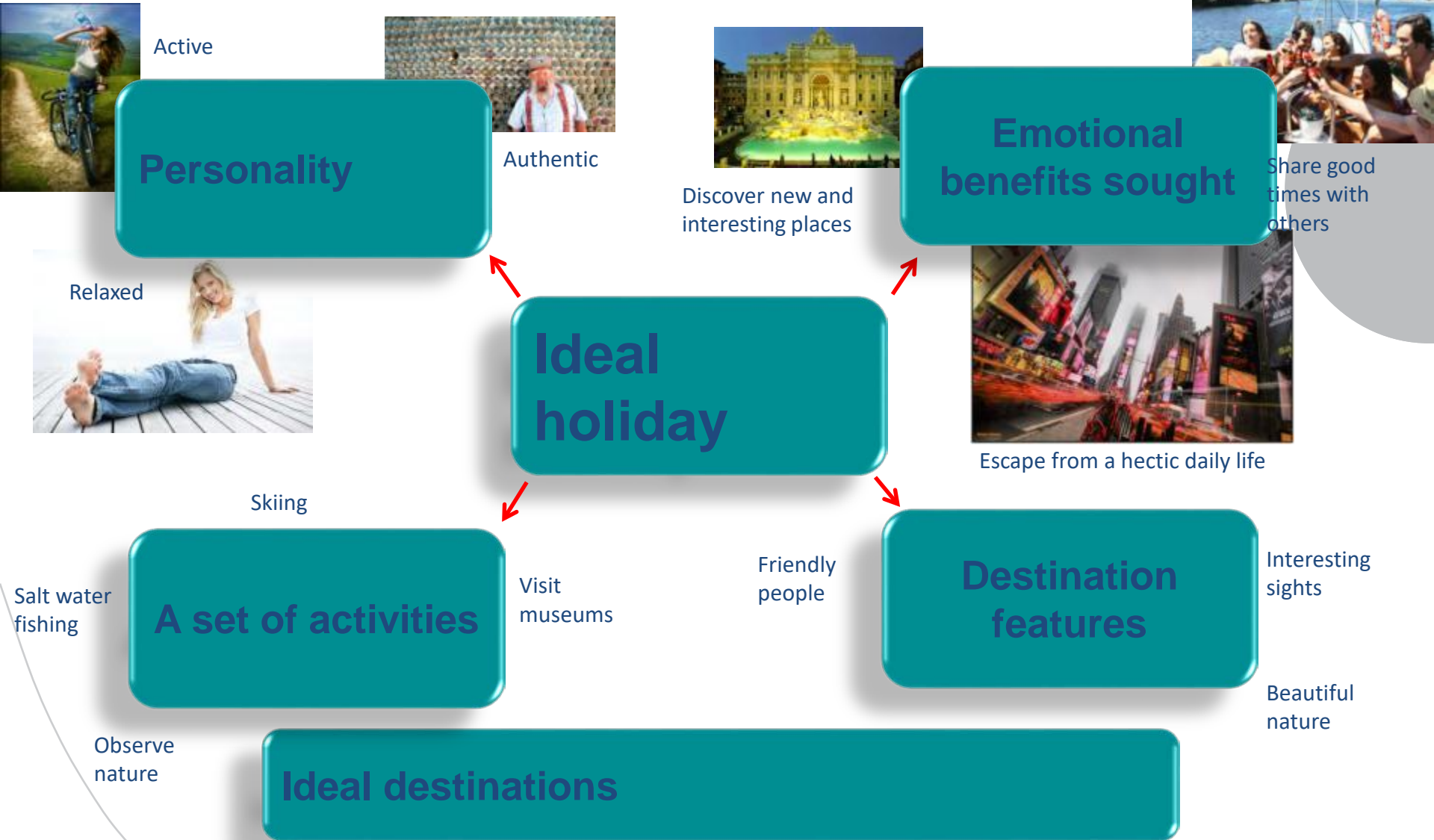


The results

*Fundamental meaning of
winter holidays in Denmark*



How can a ideal holiday be described?



Fundamental meaning of the category

GOOD SKIING

BE PHYSICALLY ACTIVE

HAVE FUN

A SHARED EXPERIENCE

TOGETHER WITH FRIENDS OR FAMILY

VARIETY IN SLOPES

ESCAPE FROM OBLIGATIONS

INFORMAL

Cross-country

GOOD FOOD & DRINKS

RELAXING

COSY

SAFE

BEAUTY OF NATURE

EASY TO GET AROUND

ALPINE SKIING

General perspective of the role of holidays in the Danish culture

Key insight from qualitative

- It seems especially important for the Danish to get away from the typical Danish society that is so structured, stressed, full of rules and demands. There's a wish to revitalize the bonds and strengthen them in a setting that's unplugged from daily responsibilities and routines.



"Holiday at home doesn't work. If you do that you end up doing everyday things anyway" Male, 43

"We are increasingly busy at work so when we go on holiday we really need to relax. You have to compensate for being busy in everyday life. Holiday is a way of apologizing to your kids. You might not have too much time to during everyday life as you would like" Female, 47

○ Pulling the plug is an essential need

- As Danes generally feel busy and hung up in everyday life they appreciate the opportunity to pull the plug and rejuvenate
- This includes not checking mail/answering the phone but also disconnecting from the news flow allowing to be fully present in the moment
- This cannot be done to the same extent with domestic holidays as a fundamental change of setting is required to be able to escape everyday routines

"You are flooded with news while on charter holiday. On a skiing holiday Third World War could begin and you wouldn't have a clue" Female, 47

"Holiday plays an important role in my family. My wife and I are both self-employed so we enjoy to relax and turn off the mobile" Male, 36

"It is important to remember that you can recharge the batteries by being active. You don't have to lie down in a beach chair for a week" Female, 39

☞ The participants in this study look for holidays that support the feeling of being fully present in the moment

HOW

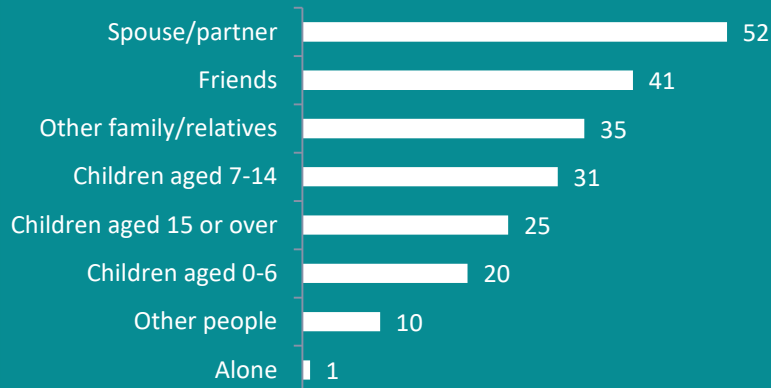
ACCOMODATION

- Rented or borrowed cabin (37%)
- Hotel medium standard (20%)
- Rented or borrowed apartment (19%)

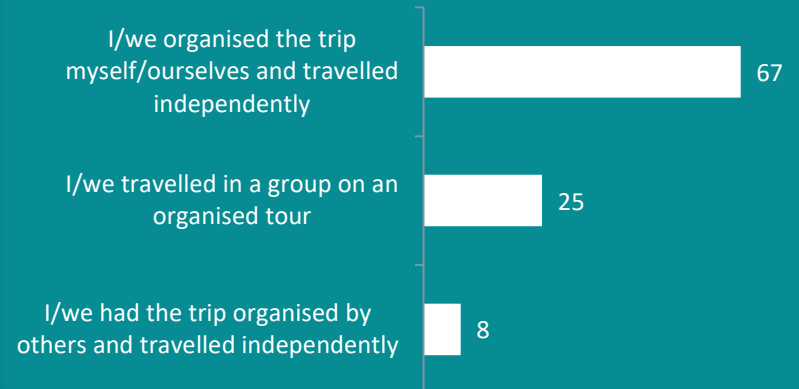
TRAVEL TO DESTINATION

- Road vehicle (64%)
- Bus (22%)
- Ferry (21%)
- Scheduled flight (10%)

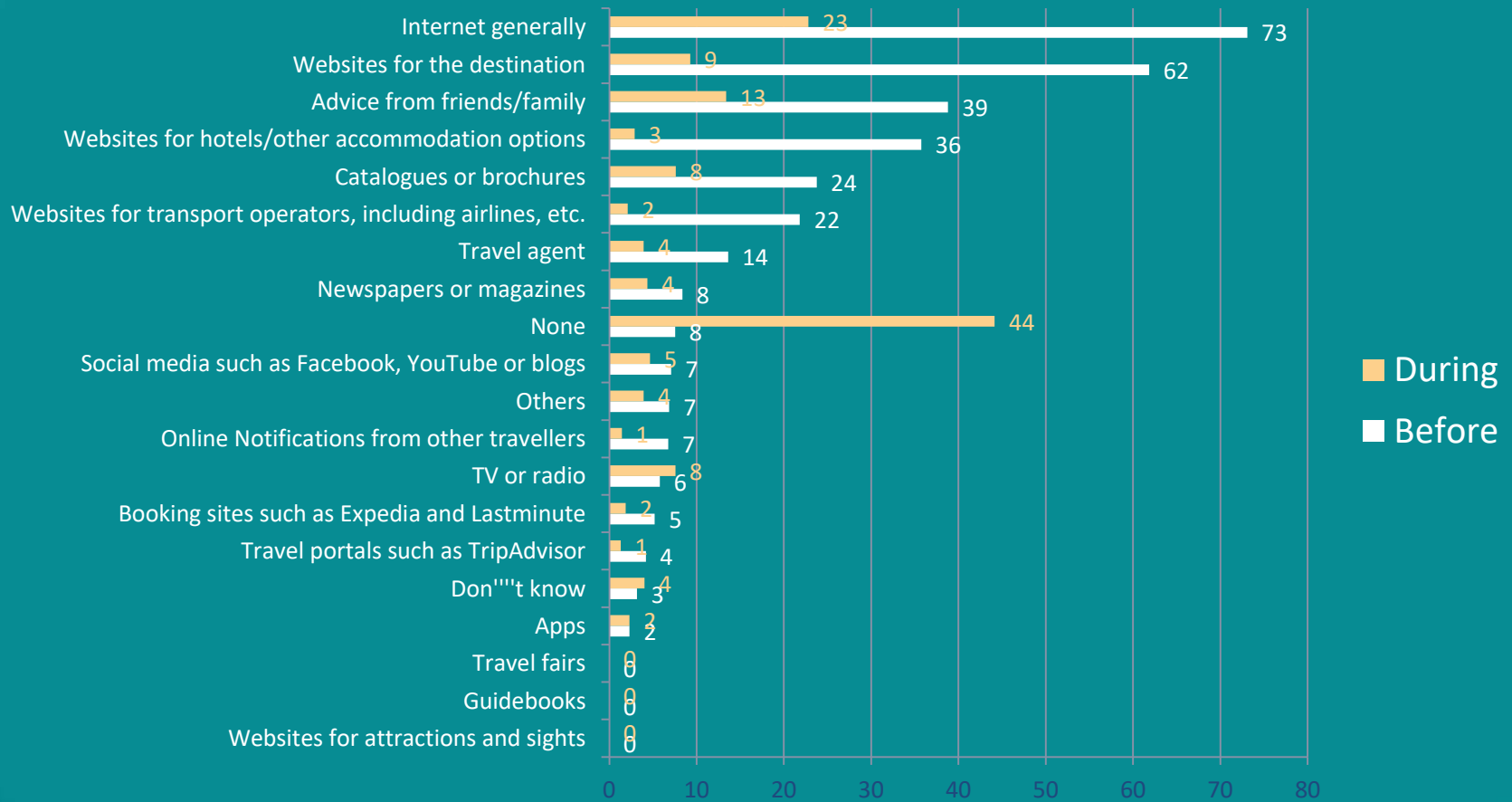
WITH WHOM



ORGANISATION



Danish information sources –regardless of brands and type of holiday



The results

Motivational strategies for ski-holiday



Segmentation process

- The original segmentation gave us a very large segment –Liberation. This reflects how strong the core in the upper part of the model is and is in line with for instance The Netherlands.
- In order to have an actionable segmentation, we made it harder for respondents to be allocated to Liberation, only if they are extremely Liberation, they were allocated to this segment. Other respondents that were originally allocated to this segment were reallocated to the second best fitting segment.

Motives for ski holidays

Exploration



Moving boundaries

Liberation



To feel free and having fun

Sharing Good Times



Opening up to other people



LUXURY

It makes me feel I'm doing something special and exclusive



Togetherness

Having a nice time together with family and friends

Routine



Good planning and control

Broadening my Horizon

Focusing on your own needs and capabilities

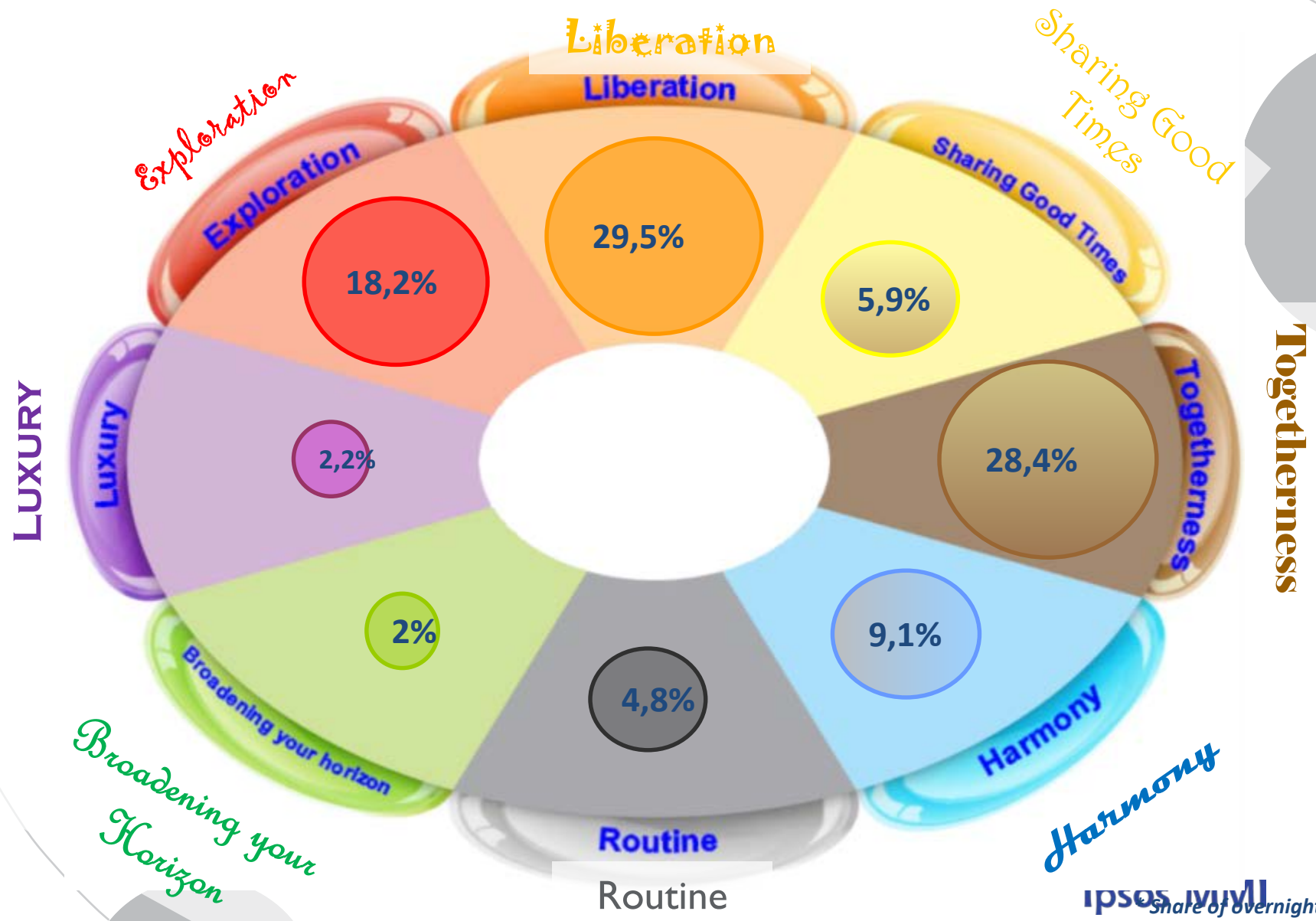
Harmony



Feel secure



Segment volume – all markets in total - ski holidays in general



Summary of the segments

The ideal ski-destination should give me an active and funny break from everyday life in close relationship with family and friends.

The ideal ski-destination should give me new challenges improving my ski technique and giving me a feeling of moving own boundaries

The ideal ski-destination should bring me together with other people in an open and exploring atmosphere.

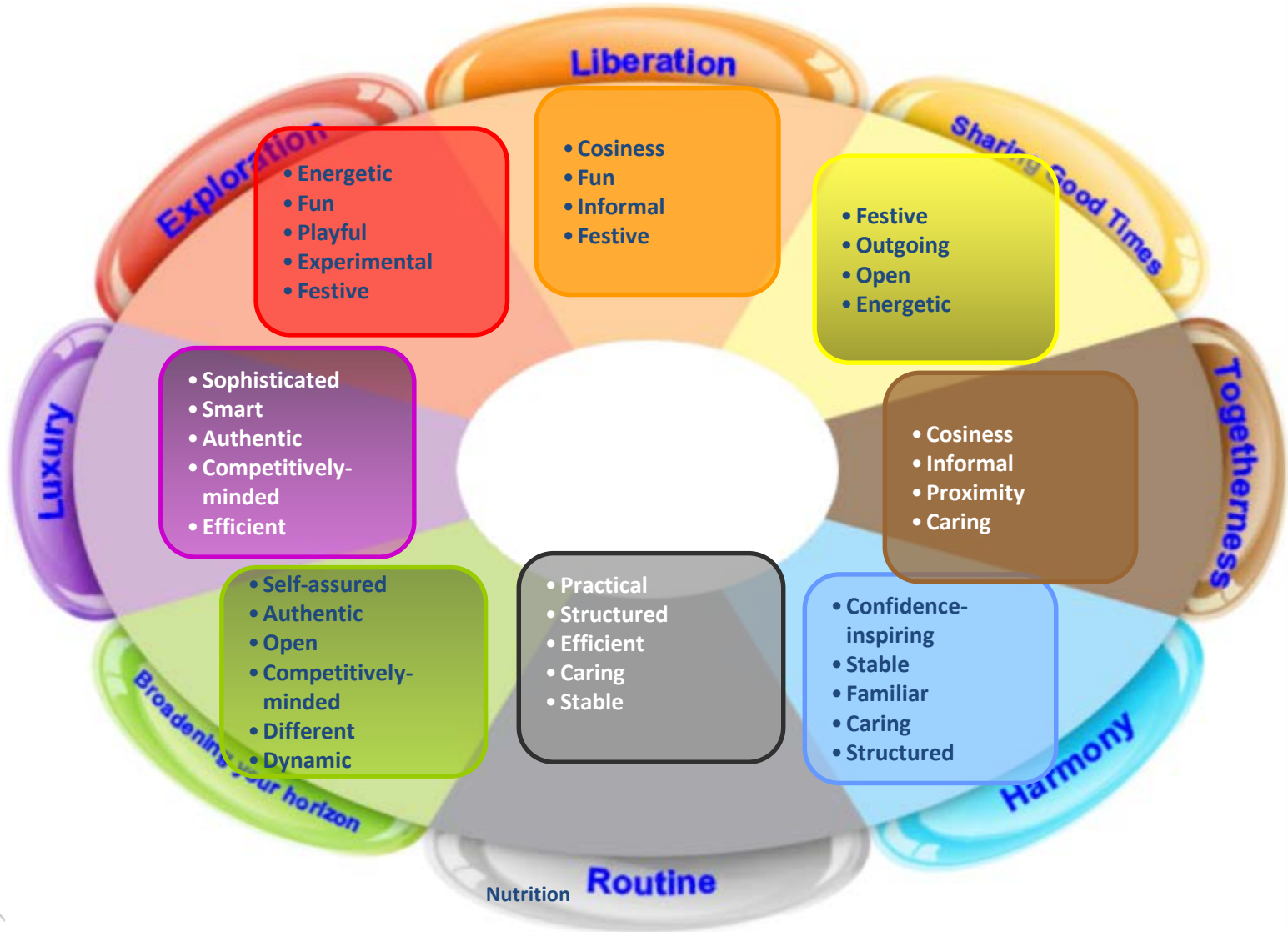
The ideal ski-destination should give me an exclusive adventure making me feel special and giving me the possibility to let go of my inhibitions

The ideal ski-destination should give me and my family a sharing, relaxed and carefree experience far away from daily life

The ideal ski-destination should give me the possibility to only focus on my own needs making me feel free, capable and authentic

The ideal ski-destination should not take away the feeling of overview and control

The ideal ski-destination should makes me feel secure



Destination features

- Lots of steep/demanding pistes for experienced skiers
- Large skiing system with many kilometres of pistes
- Well prepared pistes
- A large variety of pistes
- After-ski options and night life

- Well-prepared pistes
- A wide selection of pistes with different levels of difficulty
- Short/no queue for lifts

- After-ski options and night life
- Good off-piste options
- Sunshine and mild weather
- **Café and eateries on the terrain**

- Option to include ski hire in the price
- Good off-piste options
- Shopping opportunities in town
- Opportunity to experience cultural/historical attractions (besides skiing)
- Cabin lift
- Easy to reach your destination without your own car
- Lots of steep/demanding pistes for experienced skiers

- **Good driving conditions on the roads**
- **Peaceful surroundings without parties/noises**

- Out-of-town cross-country trails in peaceful, scenic surroundings
- Opportunity to experience cultural/historical attractions (besides skiing)
- Lots of kilometers of cross-country trails
- Hotel accommodation
- Option of ski-in/ski-out
- Well-prepared trails for cross-country/high mountain/woodland trails and circular trips

- **Option to switch from alpine to cross-country skiing and back without additional payment**
- **All-inclusive trips**
- **Access to travel guide at the destination**
- **Well-prepared trails for cross-country/high mountain/woodland trails and circular trips**
- **Danish-speaking skiing instructors for children**
- **Option of introductory offers/offers for beginners for those on their first trip**

- **Snow playground for children**
- **Danish-speaking skiing instructors for children**
- **Peaceful surroundings without parties/noises**
- **Accommodation in cabins**

Activities per segment

- Alpine skiing
- Experiencing the night life
- Local food, restaurants

- Alpine skiing
- Experiencing the beauty of nature
- Relaxing
- Local food, restaurants

- Experiencing the night life
- Snowboarding
- Riding a snow scooter

- Attending or participating in sports events
- Visiting historic buildings/places
- Swimming
- Visiting spa centres
- Sightseeing
- Experiencing national festivals and traditional festivities

- Playing in the snow with the children
- Experiencing the beauty of the nature
- Relaxing
- Cross-country

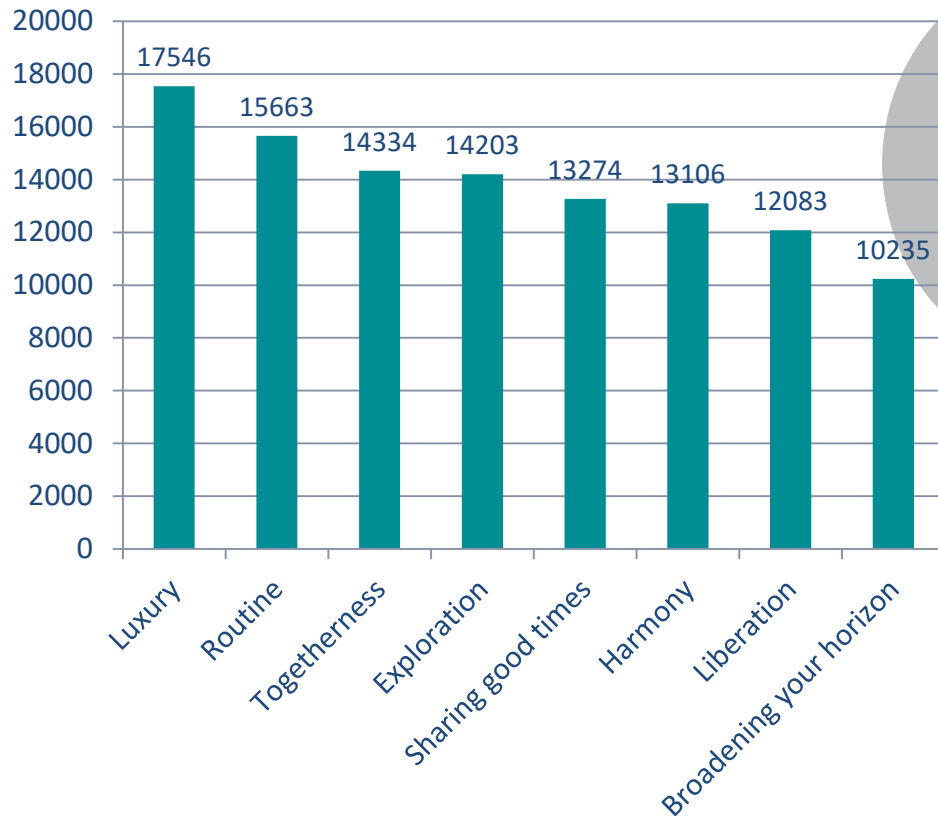
- Experiencing local history and legends
- Visiting spa centers
- Attending or participating in sports events
- Cross-country
- Experiencing national festivals and traditional festivities

- Sightseeing
- Experiencing national festivals and traditional festivities
- Shopping
- Cross-country

- Playing in the snow with the children

Average spent for each segment

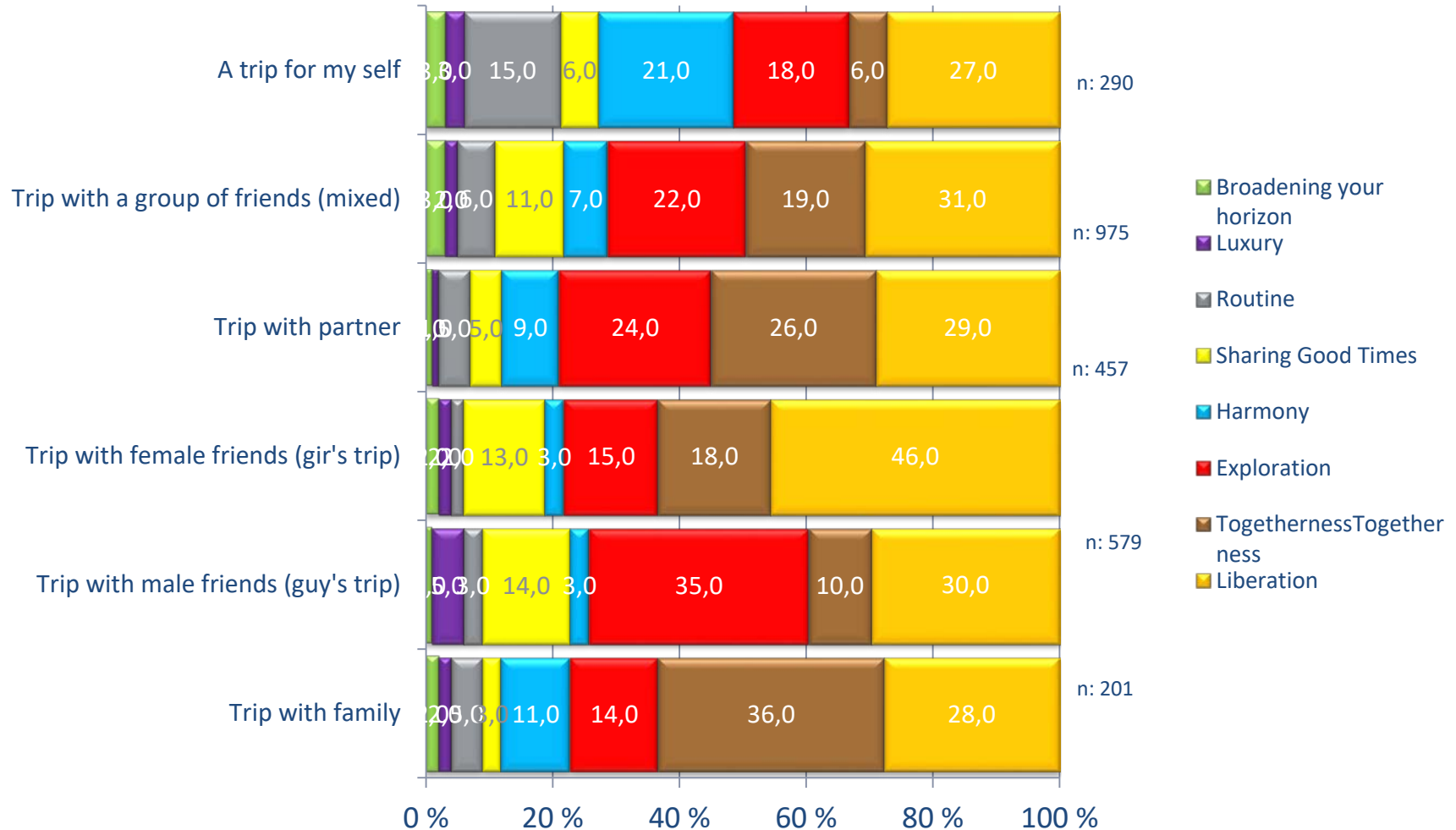
Routine	kr 15.663
Harmony	kr 13.106
Togetherness	kr 14.334
Broadening your Horizon	kr 10.235
Liberation	kr 12.083
Luxury	kr 17.546
Exploration	kr 14.203
Sharing good times	kr 13.274



Destination visits per segment

	Norway	Austria	Sweden	France	Italy	Germany	Switzerland
N=	904	525	469	241	135	61	54
Routine	5%	3%	5%	5%	3%	8%	6%
Harmony	11%	7%	11%	6%	2%	2 11%	6%
Togetherness	1 33%	2 24%	1 36%	3 17%	12%	1 44%	1 33%
Sharing Good Times	4%	8%	3%	8%	3 13%	3%	6%
Liberation	2 30%	1 32%	2 28%	1 29%	1 33%	2 18%	2 31%
Exploration	3 13%	3 22%	3 15%	1 29%	1 33%	8%	3 13%
Luxury	2%	3%	1%	2%	3%	2%	0%
Broadening your horizon	1%	2%	1%	3%	1%	5%	6%

Segments share of occasions - All destinations (profiled) -



Travelling with kids (any age)

Most Togetherness trips are with kids. Exploration and Liberation are significantly less likely to travel with kids.

Togetherness	69%
Harmony	57%
Luxury	53%
Routine	51%
Liberation	48%
Broadening your horizon	43%
Exploration	42%
Sharing Good Times	25%

The results

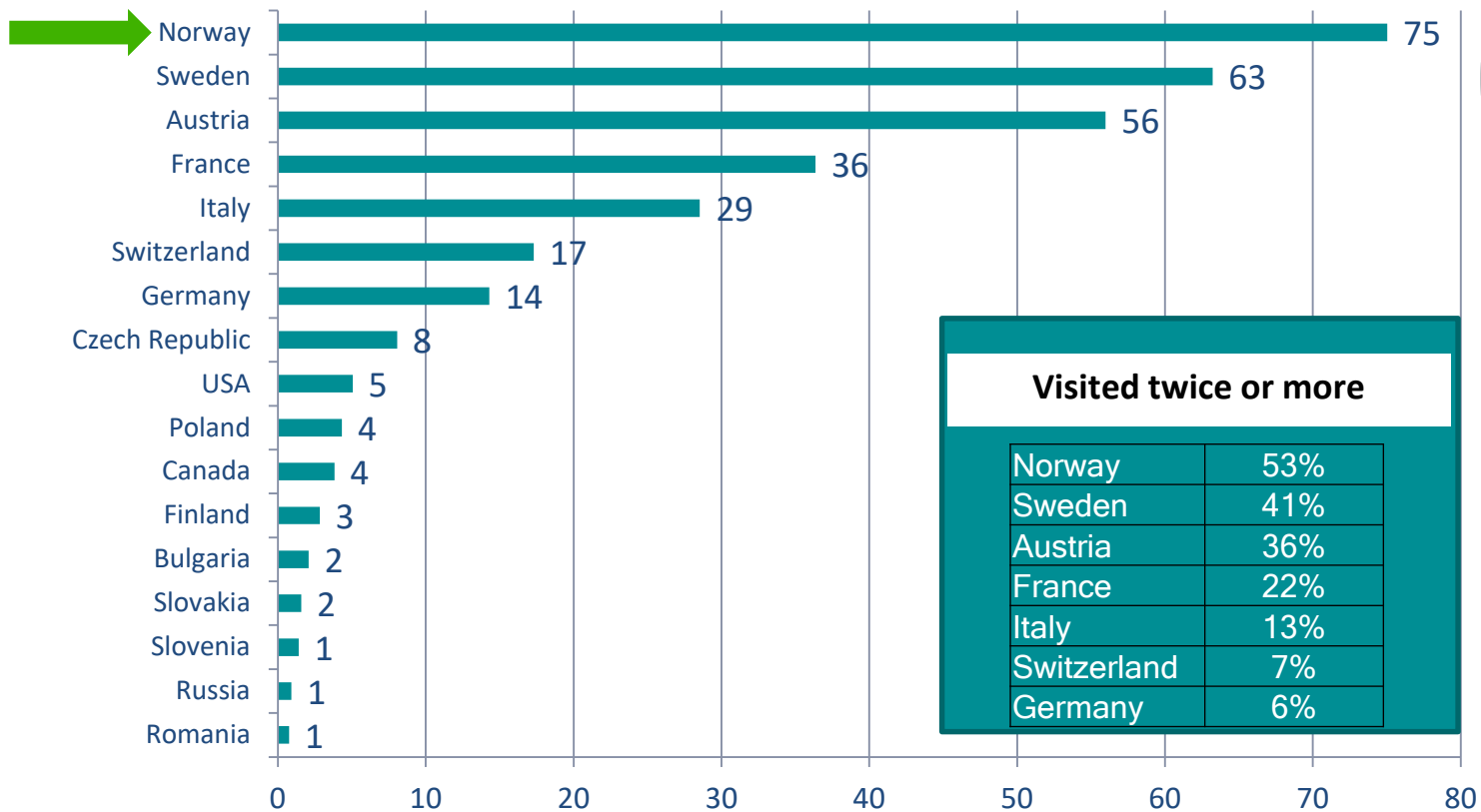
Assessment of Norway as a ski destination



Where do the Danish go on ski vacation?

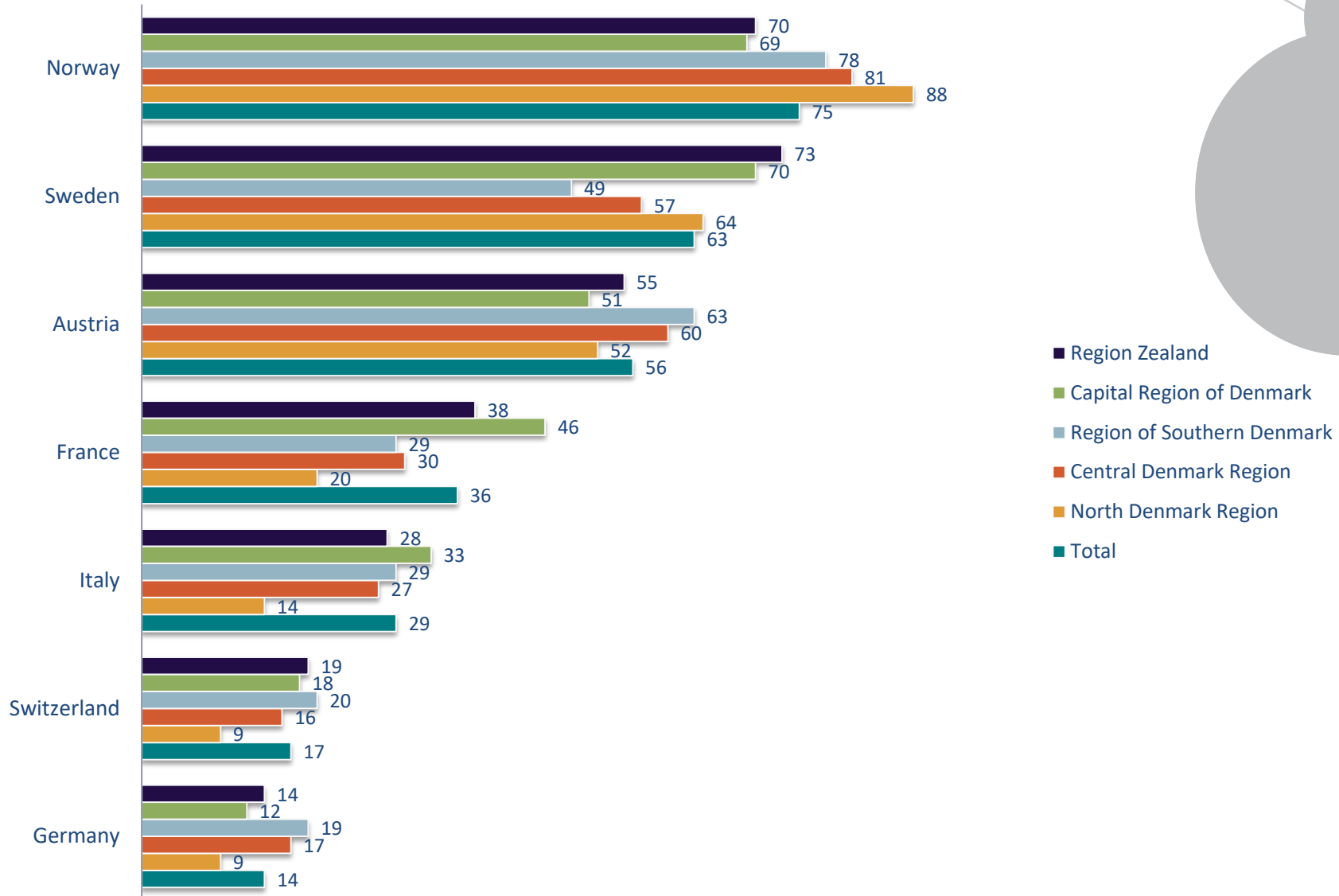
75% have ever visited Norway.

Penetration = ever visited (1 or more times)



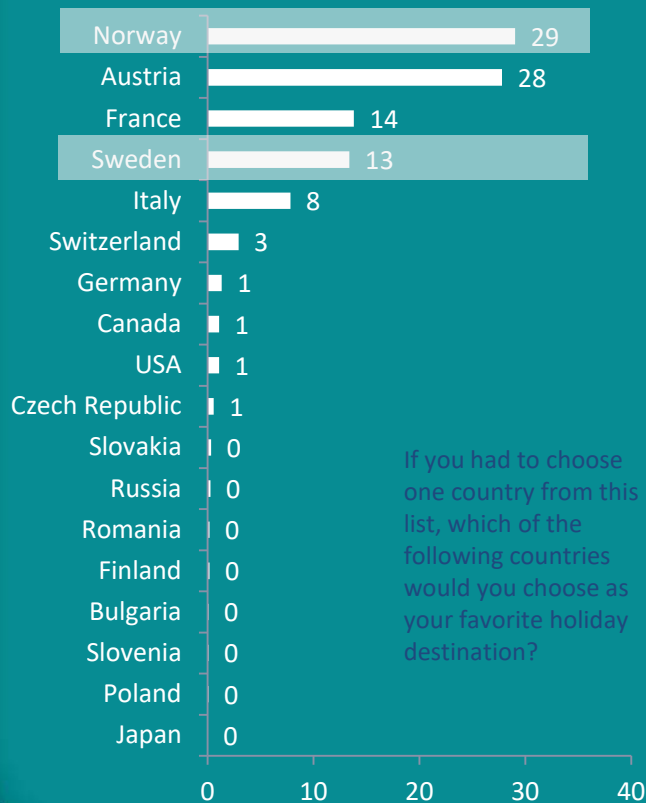
Norway as a travel destination in different regions

Penetration = ever visited

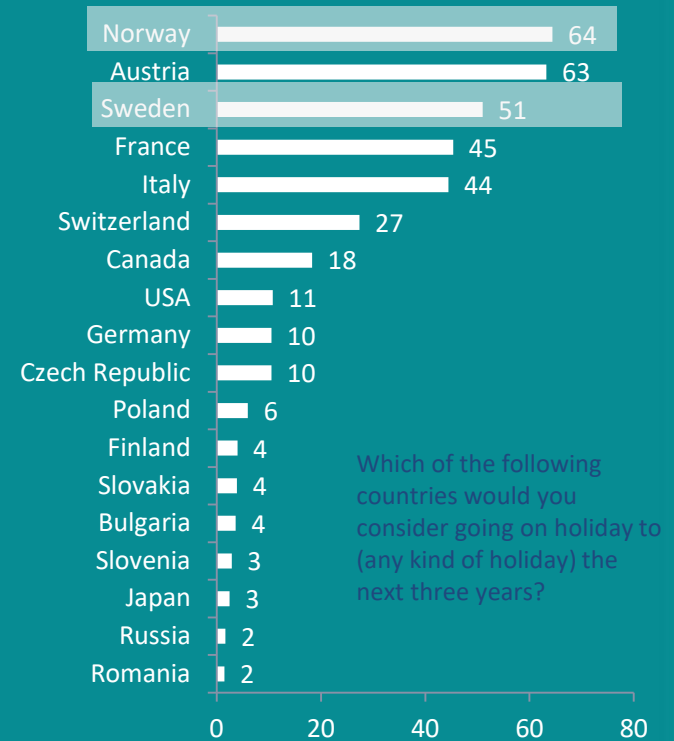


Norway is #1 in both consideration and favorite destination

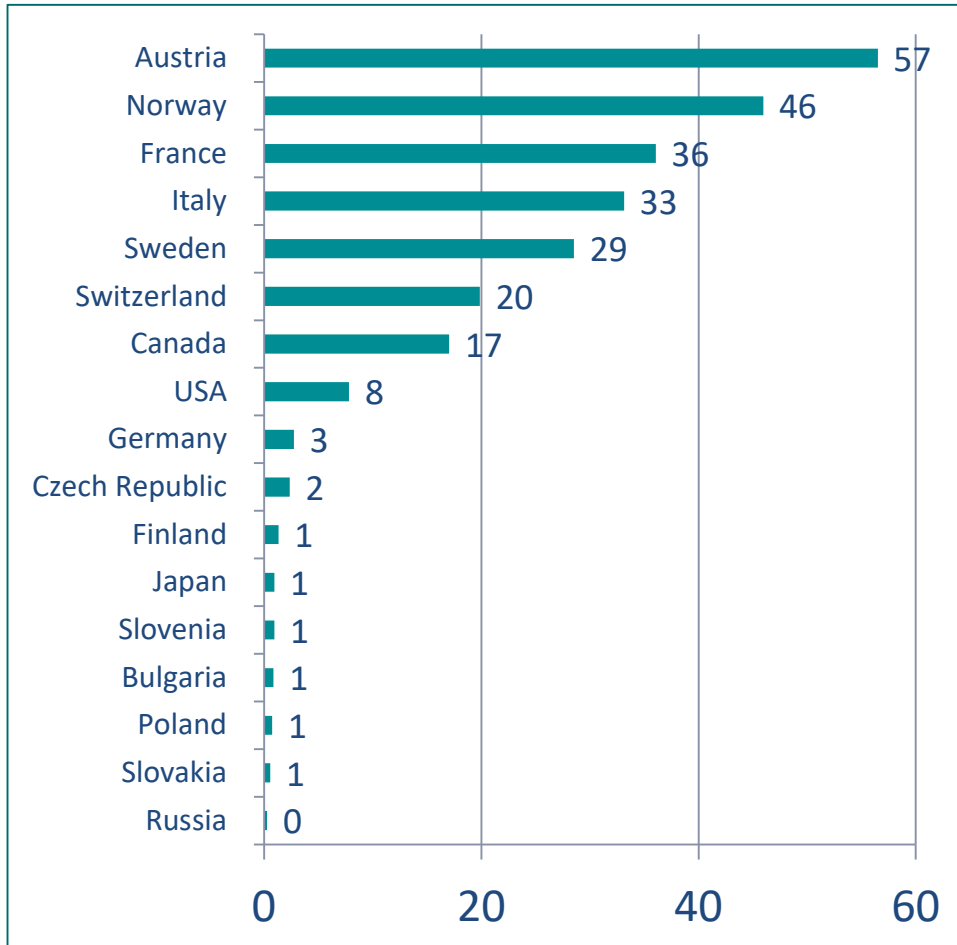
FAVORITE DESTINATIONS



CONSIDERED DESTINATIONS



The overall opinion of Norway as a holiday destination is second only to Austria, but better than France, Italy, Sweden and Switzerland.



Using the scale below, please rate your overall opinion of each country as a holiday destination.

Scale: 1= Extremely poor, 10= Excellent. Graph shows top 3 box share (8-10)

Norway as a travel destination for the Danish

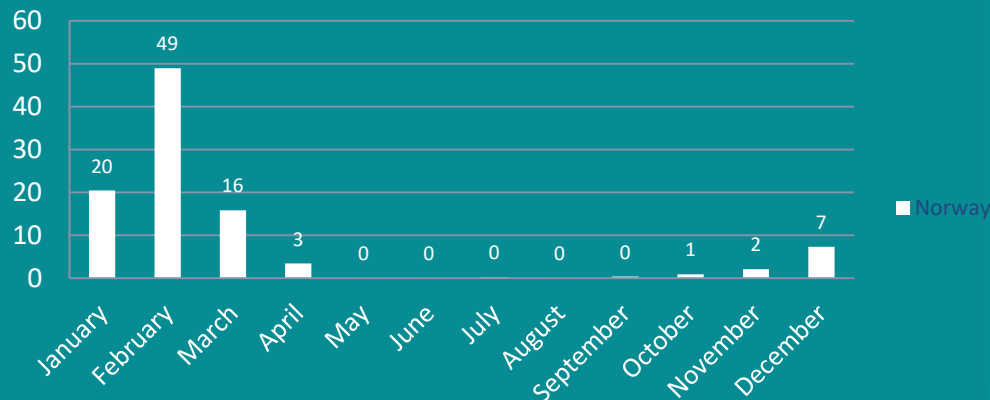
5W profiling

WHO

DEMOGRAPHICS

- Male and female (almost equal share)
- Evenly distributed in age (40-49 largest group with 25% of the share and an index of 142)
- Education 3-4 years (36%).
- 5 or more years (22%)

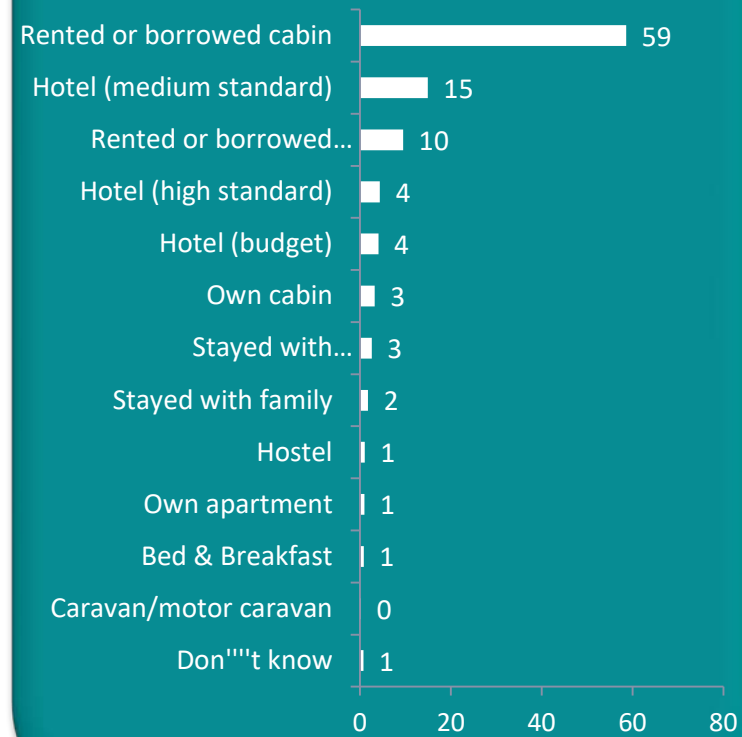
WHEN



Average length of stay Norway: 7 days

WHERE

ACCOMODATION



Norway as a travel destination for the Danish

5W profiling

HOW

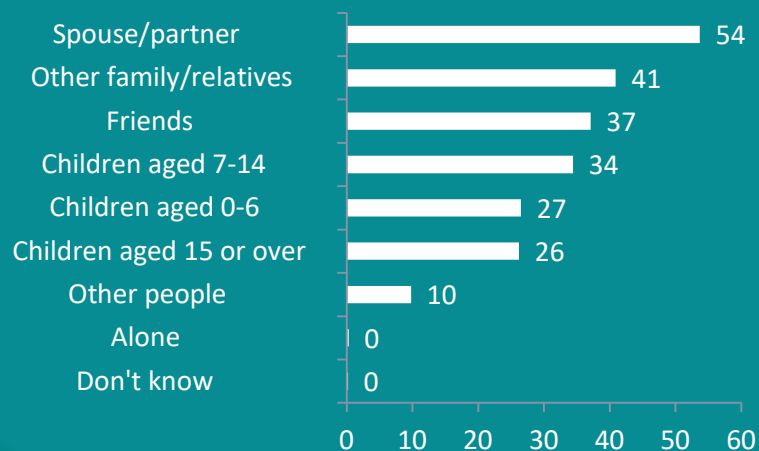
TRAVEL TO DESTINATION

- Road vehicle (74%)
- Ferry (41%)

TRAVEL AT DESTINATION

- Mostly own car (69%)
- bus (14%)

WITH WHOM

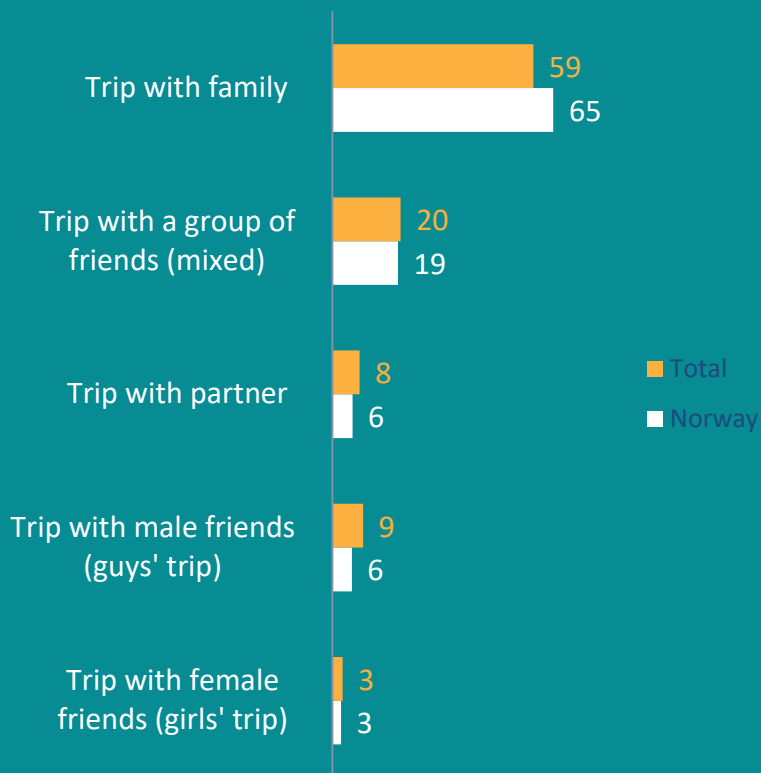


ORGANISATION

- 71 % organized individually
- 22% travelled in a group as part of an organized tour.

Norway has a slightly higher share of family trips compared to the total. Norway is very much associated with Family trips.

TYPE OF HOLIDAY DANISH TOURISTS TRAVEL ON



TYPE OF HOLIDAY - SUITABILITY OF NORWAY AS A DESTINATION

- Trip with family (89%)
- Trip with a group of friends (mixed) 71%
- Trip with partner (70%)

Many have told us that when they travel abroad on these kind of ski holidays, some destinations might be more relevant than others.

Below you'll find a list of ski holidays. Please tick those destinations that are suitable for each type of holiday.

Some destinations are much more popular for people with kids than others

Norway is the second most popular destination on trips with kids of any age.

average	52%
Sweden	62%
Norway	58%
Germany	56%
Austria	47%
Switzerland	41%
Italy	39%
France	35%

The results

Perception of Norway



Norway as a travel destination for the Danish

5W profiling

WHAT

PRODUCT CHARACTERISTICS

- **Accommodation in cabins**
- Attractive/majestic scenery
- **Good pistes for beginners**
- Well-prepared pistes
- **Peaceful surroundings without parties/noise**

ACTIVITIES

- Experiencing the beauty of nature
- **Relaxing**
- **Cross-country**
- Alpine skiing
- **Playing in the snow with the children**

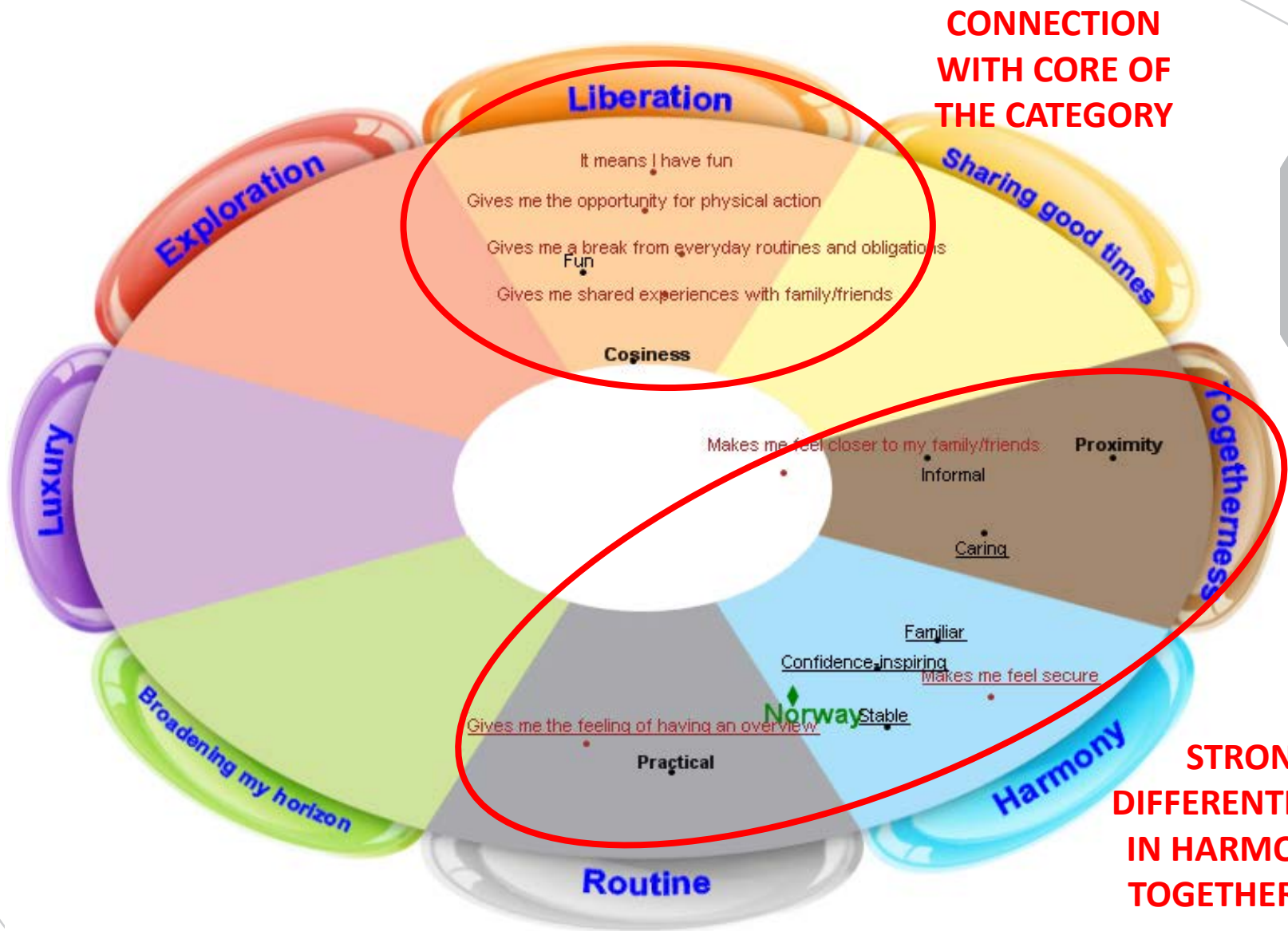
WHY

EMOTIONAL BENEFITS

- Gives me shared experiences with family/friends
- Gives me the opportunity for physical action
- Gives me a break from everyday routines and obligations
- It means I have fun
- Makes me feel closer to my family/friends

PERSONALITY

- **Cosiness**
- Fun
- Informal
- **Practical**
- **Proximity**



CONNECTION WITH CORE OF THE CATEGORY

STRONG DIFFERENTIATION IN HARMONY & TOGETHERNESS



Norway has a strong position in Harmony and Togetherness, but also in Routine. This means Norway is very much about giving me a safe, stable, informal, cosy and family friendly ski holiday.

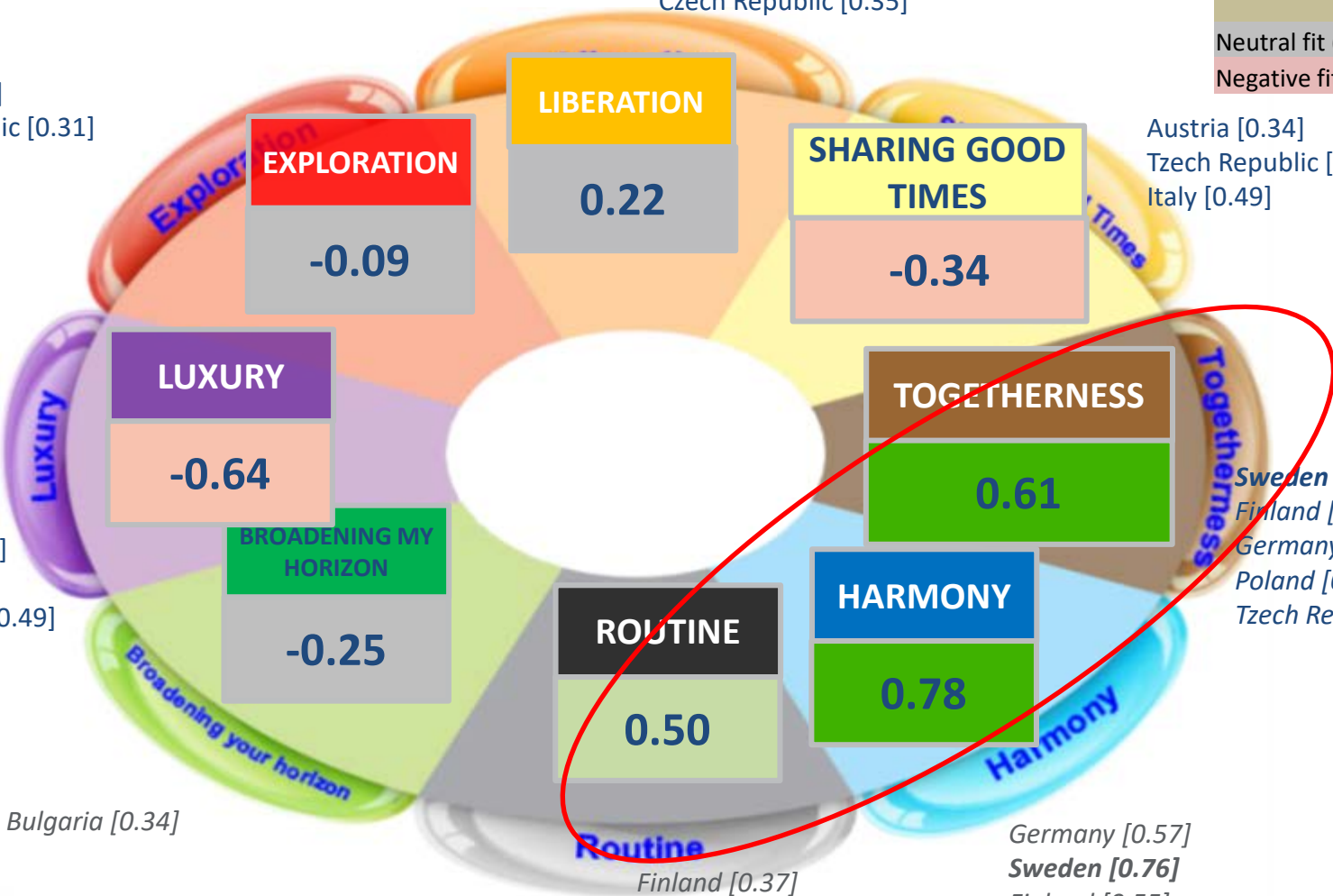
Perceptual Fit with segments – Norway

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

Austria [0.37]
Czech Republic [0.35]

Austria [0.55]
Czech Republic [0.31]
France [0.40]
Italy [0.54]

Austria [0.34]
Tzech Republic [0.38]
Italy [0.49]



Sweden [0.66]
Finland [0.41]
Germany [0.33]
Poland [0.32]
Tzech Republic [0.31]

Canada [0.33]
Russia [0.57]
Switzerland [0.49]
USA [0.60]

Bulgaria [0.34]

Finland [0.37]
Germany [0.72]
Slovenia [0.51]
Sweden [0.50]

Germany [0.57]
Sweden [0.76]
Finland [0.55]

Perception of Destinations -correlations

	Routine	Harmony	Togetherness	Broadening my horizon	Liberation	Luxury	Exploration	Sharing good times
Austria	-0.01	0.2	0.19	-0.29	0.37	-0.55	0.55	0.34
Bulgaria	-0.19	-0.32	0.02	0.34	0.02	0.06	0.01	0.11
Canada	-0.39	-0.46	-0.3	0.17	-0.16	0.53	0.03	-0.02
Czech Republic	-0.07	-0.09	0.31	0.08	0.35	-0.46	0.31	0.38
Finland	0.37	0.55	0.41	0	0.01	-0.25	-0.36	-0.46
France	-0.31	-0.33	-0.34	-0.1	0.06	0.13	0.4	0.31
Germany	0.72	0.57	0.33	-0.26	0.11	-0.48	-0.18	-0.42
Italy	-0.47	-0.35	-0.13	-0.16	0.25	-0.01	0.54	0.49
Japan	-0.2	0.05	-0.17	0.17	-0.23	0.2	-0.2	0.08
Norway	0.5	0.78	0.61	-0.25	0.22	-0.64	-0.09	-0.34
Poland	-0.17	-0.08	0.32	0.18	0.28	-0.14	0.05	-0.01
Romania	-0.26	-0.23	-0.18	0.26	0.04	0.09	0.12	0.24
Russia	-0.24	-0.22	-0.26	0.05	-0.3	0.57	-0.38	-0.02
Slovakia	0.16	-0.01	0.14	0.26	-0.02	-0.11	-0.1	-0.14
Slovenia	0.51	-0.05	-0.26	-0.08	-0.37	0.21	-0.4	-0.14
Sweden	0.5	0.76	0.66	-0.32	0.29	-0.67	-0.03	-0.33
Switzerland	0.01	-0.16	-0.45	-0.19	-0.26	0.49	-0.15	-0.18
USA	-0.44	-0.58	-0.53	0.2	-0.29	0.6	0.07	0.22

SATISFACTIONS AND PERSONALITY

Norway and Sweden are regarded as very similar and together they are very different from France, Switzerland and Italy which also have a similar profile. Austria has no strong position compared to the other countries.

Norway and Sweden

Satisfactions

- Makes me feel secure (NO/SE)
- Gives me the feeling of having an overview (NO/SE)
- Gives me the opportunity to make all my family members/friends happy (SE)

Personality

- Familiar (NO/SE)
- Caring (NO/SE)
- Practical (NO/SE)
- Confidence-inspiring (NO/SE)
- Proximity (NO/SE)
- Stable (NO/SE)
- Cosiness (NO/SE)
- Informal (SE)

Index > 120

France, Switzerland, Italy

Satisfactions

- Helps me improve my technique (AU/FR)
- Gives me an opportunity to challenge myself and move my boundaries (FR/IT)
- Gives me the opportunity to let go my inhibitions (FR)
- Gives me a feeling of exclusivity (SW)
- Makes me feel special (SW)

Personality

- Smart (FR/SW/IT)
- Sophisticated (FR/SW/IT)
- Energetic (FR/SW/IT)
- Self-assured (FR/SW/IT)
- Festive (AU/FR/IT)
- Competitively-minded (FR/SW)
- Dynamic (FR/SW)
- Experimental (FR)
- Structured (SW)
- Outgoing (IT)

Index > 120

Austria

Satisfactions

- Gives me the opportunity to make my own needs central (AU)
- Helps me improve my technique (AU/FR)

Personality

- Festive (AU/FR/IT)

Index > 120

PRODUCT CHARACTERISTICS

Norway and Sweden are regarded as very similar and together they are very different from France, Switzerland and Italy which also have a similar profile. Austria are associated with less product characteristics than the other non Scandinavian countries.

Norway and Sweden

Product characteristics

- Danish-speaking skiing instructors for children (NO/SE)
- Lots of kilometres of cross-country trails (NO/SE)
- Out-of-town cross-country trails in peaceful, scenic surroundings (NO/SE)
- Well-prepared trails for cross-country/high mountain/woodland trails and circular trips (NO/SE)
- Accommodation in cabins (NO/SE)
- Child-care options (NO/SE)
- Peaceful surroundings without parties/noise (NO/SE)
- Option to switch from alpine to cross-country skiing and back without additional payment (NO/SE)
- Snow playground for children (NO/SE)
- Small, manageable skiing systems (NO/SE)
- Short transportation time to and from the destination in your own car or by bus (NO/SE)
- Lighted ski trails, alpine/cross country (NO/SE)
- Good pistes for beginners (NO/SE)

Index > 120

France, Switzerland, Italy

Product characteristics

- Lots of steep/demanding pistes for experienced skiers (AU/FR/SW/IT)
- After-ski options and night life (AU/FR/IT)
- Large skiing system with many kilometres of pistes (AU/FR/SW/IT)
- Cabin lift (AU/FR/SW/IT)
- Terrain park (AU/FR)
- Good off-piste options (AU/FR/SW/IT)
- Options of ski-in/ski-out (FR)
- Sunshine and mild weather (FR/SW/IT)
- A wide selection of pistes and different levels of difficulty (FR/IT)
- Accommodation in apartments (FR/IT)
- Shopping opportunities in town (FR/SW/IT)
- Cafes and eateries in the terrain (FR/IT)
- Wi-Fi in the cabin, apartment/hotel (SW)
- Snow safety (SW)

Index > 120

Austria

Product characteristics

- Large skiing system with many kilometres of pistes (AU/FR/SW/IT)
- Cabin lift (AU/FR/SW/IT)
- Lots of steep/demanding pistes for experienced skiers (AU/FR/SW/IT)
- Good off-piste options (AU/FR/SW/IT)
- After-ski options and night life (AU/FR/IT)
- Terrain park (AU/FR)

Index > 120

IDEAL ACTIVITIES

Norway and Sweden are regarded as very similar and together they are very different from France, Switzerland, Italy and Austria which also have a pretty similar profile.

Norway and Sweden

Ideal activities

- Cross-country (NO/SE)
- Driving a dog sled (NO/SE)
- On a skiing course (NO/SE)
- Playing in the snow with the children (NO/SE)
- Riding a snow scooter (NO/SE)
- Relaxing (NO/SE)
- Snowboarding (SE/FR)

Index > 120

France, Switzerland, Italy, Austria

Ideal activities

- Sunbathing against the wall of the cabin (AU/FR/SW/IT)
- Experiencing the night life (AU/FR/IT)
- Alpine skiing (FR/SW/IT)
- Visiting spa centres (AU/SW)
- Sport activities (rock climbing, kiting, paragliding etc) (FR/SW)
- Exercising at a gym/fitness centre (FR/SW)
- Shopping (FR/IT)
- Visiting historic buildings/places (SW)
- Visiting restaurants (IT)
- Eating local food and drinking beverages (IT)
- Experiencing national festivals and traditional festivities (AU)
- Swimming (AU)

Index > 120

Conclusions & Recommendations



1. Reach Olympic minimum on generic/core expectations of winter holiday
2. Tighten fit with Togetherness
3. Build different niches to get market share from the Alps.

1. Reach Olympic minimum on generic expectations

- The core of the category is very dominant for Skiing in Denmark.
- Even more than ever before, it is important to meet the basic, universal expectations of skiing, before trying to differentiate.

Comparison against total core



<u>STRENGTHS</u>	<u>WEAKNESS</u>
<p>Cosiness Proximity</p>	<p>Energetic Informal</p>
<p>Beauty of nature Relaxing (on par with Sweden)</p>	<p>Snow safety Variety in difficulty of slopes Cafés & eateries on piste</p>
	<p>Short queues Size of ski area</p>
	<p>Good facilities for purchases (food & groceries)</p>
	<p>Alpine skiing (Alps leading)</p>
	<p>Local Food & drinks</p>

1. Reach Olympic minimum on generic expectations

	CORE	Norway			Austria			France			Italy			Sweden			Switzerland		
		%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank
EMOTIONAL BENEFITS																			
Gives me a break from everyday routines and obligations	89	79	98	3	82	99	3	78	99	3	75	98	3	81	102	2	72	96	2
Gives me shared experiences with family/friends	89	81	105	1	81	103	4	77	103	4	75	102	4	83	109	1	72	100	3
It means I have fun	89	76	96	4	84	104	1	81	105	2	80	106	2	78	100	4	69	93	4
Gives me the opportunity for physical action	85	79	92	2	83	94	2	83	99	1	83	102	1	81	95	3	80	100	1
Makes me feel closer to my family/friends	79	72	109	5	70	104	5	60	95	7	65	104	5	72	111	5	62	100	5
PERSONALITY																			
Cosiness	85	74	129	1	65	112	2	38	78	6	48	105	3	71	131	1	43	85	2
Fun	83	65	90	2	73	101	1	65	106	1	64	113	1	64	95	2	52	84	1
Informal	66	57	113	3	42	83	6	25	59	14	31	78	9	59	125	3	22	51	21
Proximity	58	52	140	5	36	98	10	17	56	21	23	79	15	48	141	6	24	76	18
Energetic	53	34	90	14	44	117	4	47	148	3	40	136	4	30	87	13	39	120	5

- Core of emotional delivery is ok for Norway. None of the key competitors stand out there
- In Personality Norway leads on Cosiness and proximity, but could be more energetic (where the Alps lead)
- Sweden is seen as more informal

1. Reach Olympic minimum on generic expectations

	CORE	Norway			Austria			France			Italy			Sweden			Switzerland		
		%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank	%	Index	Rank
FUNCTIONAL BENEFITS																			
Well-prepared pistes	80	75	102	4	85	109	2	79	110	8	79	116	5	77	108	3	75	111	4
Snow safety	79	68	110	10	65	99	17	72	119	13	61	108	15	57	95	18	69	121	10
Attractive/majestic scenery	77	83	92	2	85	89	1	81	92	5	83	100	1	74	84	5	84	100	1
Easy to get around at your destination	76	67	108	12	68	104	13	65	107	15	63	109	14	69	114	7	63	109	14
A wide selection of pistes with different levels of difficulty	74	59	88	17	83	118	4	82	126	2	82	133	2	54	83	21	72	117	6
Short/no queue for lifts	69	49	97	24	35	66	37	29	59	35	34	75	28	52	106	24	40	86	29
Café's and eateries in the terrain	67	48	70	25	85	117	3	81	122	5	79	125	5	50	74	26	74	117	5
Chair lift	66	73	84	7	82	90	5	78	92	10	77	97	9	74	88	6	80	100	2
Large skiing system with many kilometres of piste	65	47	80	26	80	131	7	85	150	1	80	149	4	41	72	28	69	129	9
Good facilities for purchases (food and groceries)	62	43	77	29	66	113	14	62	115	17	60	117	16	54	101	20	51	101	20
Overall price of the trip	61	50	97	23	47	87	26	31	62	33	34	71	31	55	110	19	27	57	37
ACTIVITIES																			
Experiencing the beauty of nature	81	80	114	1	78	93	2	69	93	3	71	94	4	76	116	2	74	99	2
Relaxing	79	79	120	2	68	87	5	60	87	7	66	94	5	77	128	1	58	83	6
Alpine skiing	75	66	104	4	84	110	1	85	126	1	84	124	1	68	115	3	82	121	1
Eating local food and drinking local beverages	60	42	69	9	75	102	3	68	106	4	78	121	3	40	71	9	64	99	4
Visiting restaurants	57	37	62	10	75	104	3	73	115	2	79	124	2	37	67	10	66	104	3

2. Tighten fit with Togetherness

- Why?

- ⇒ 2nd most important segment in the market, representing almost a third of all trips
- ⇒ Only sizeable segment where Norway has a good fit
- ⇒ Clear competitive lead against the Alps (but equal to Sweden)
- ⇒ Moving away from Togetherness will be instantly exploited by Sweden

- How?

- ⇒ Looking for elements where we can improve
- ⇒ See next slide

- Danger

- ⇒ Not in line with global strategy

2. Tighten fit with Togetherness

Togetherness vs. Norway

BE LESS

- Less focus on advanced cross-country
- Small-scale resorts

BUILD ON

- Away from obligations
- Sharing quality time with friends & family
- Beautiful nature
- Good pistes for beginners

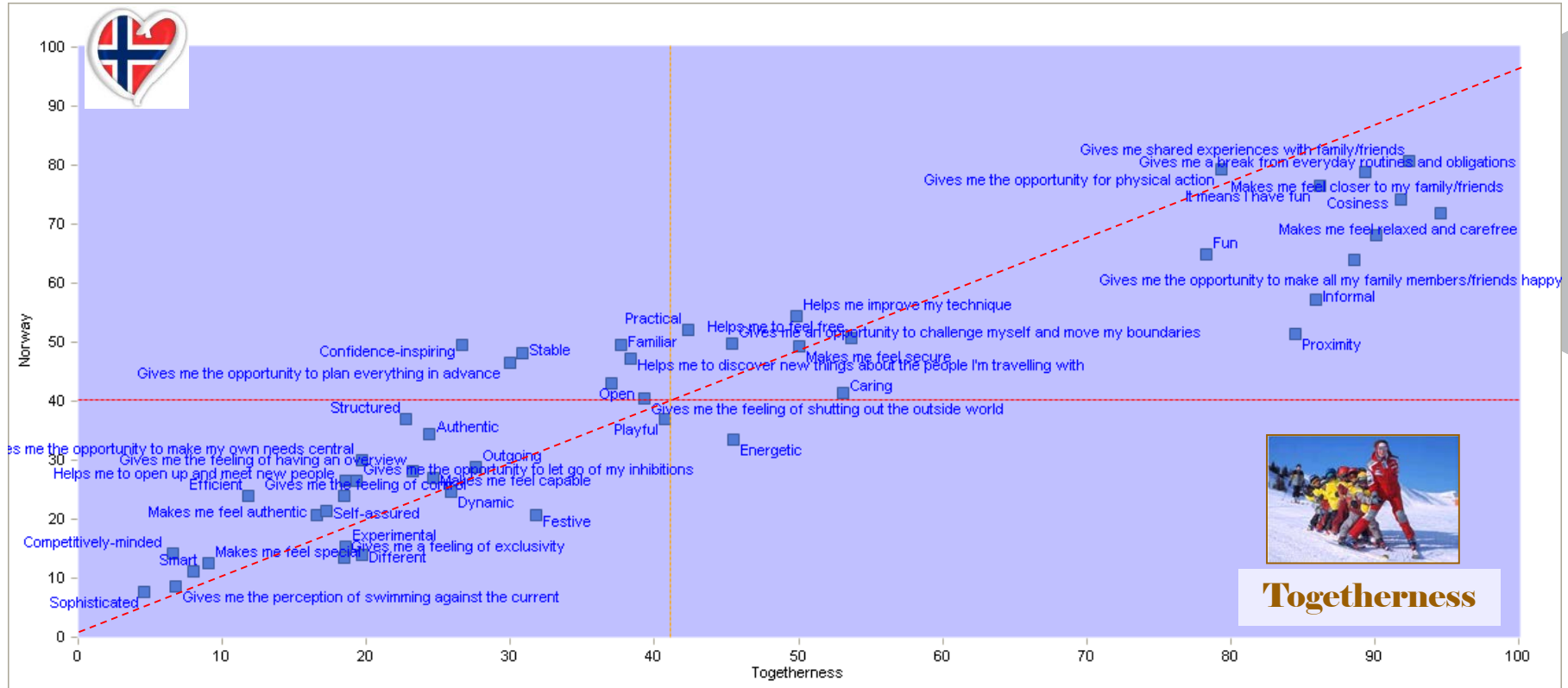


Togetherness

BE MORE

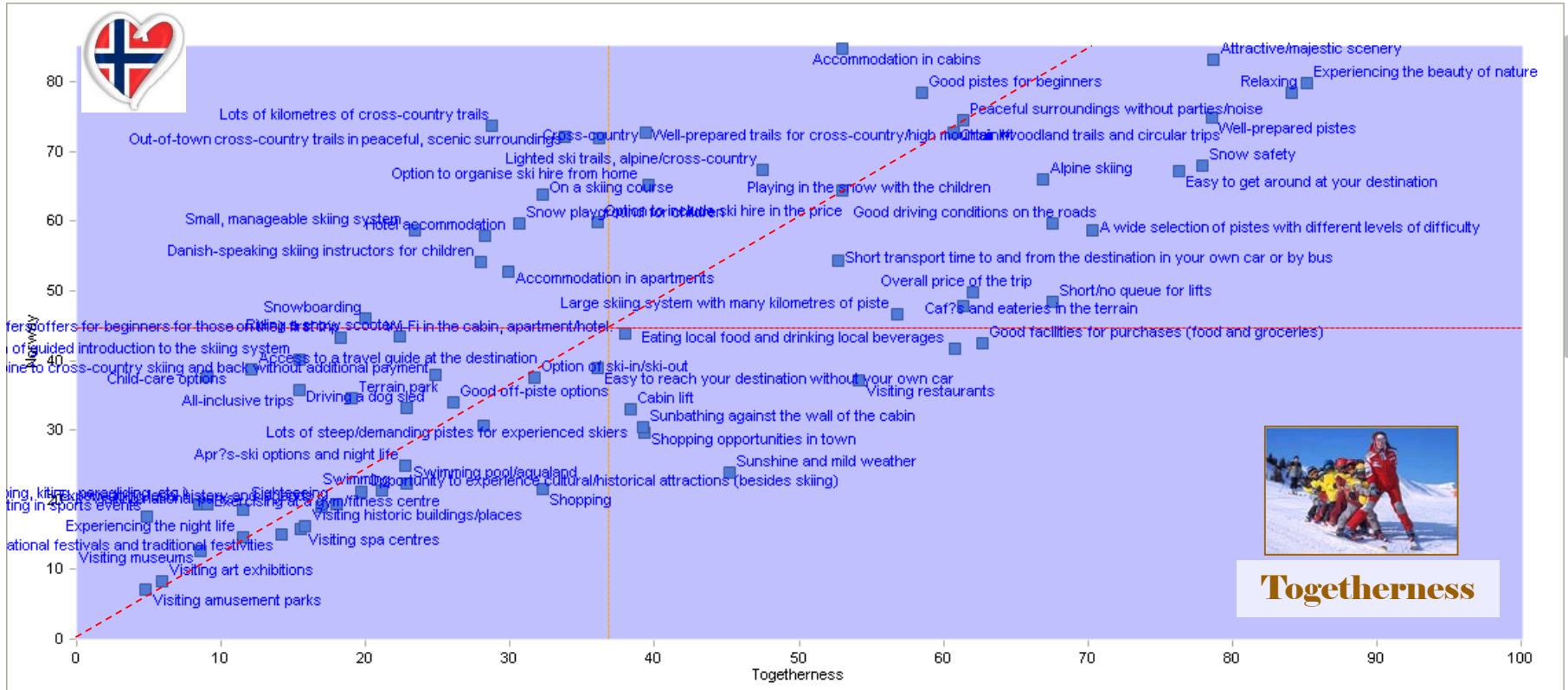
- Informal, close, cosy
- Feeling carefree, fun
- Opportunity to make family & friends happy
- Ease of travel (getting around)
- Local food, facilities for food & groceries
- Better (Alpine) skiing: wide selection of pistes, well prepared pistes

Norway vs. Togetherness



Togetherness

Norway vs. Togetherness



Togetherness

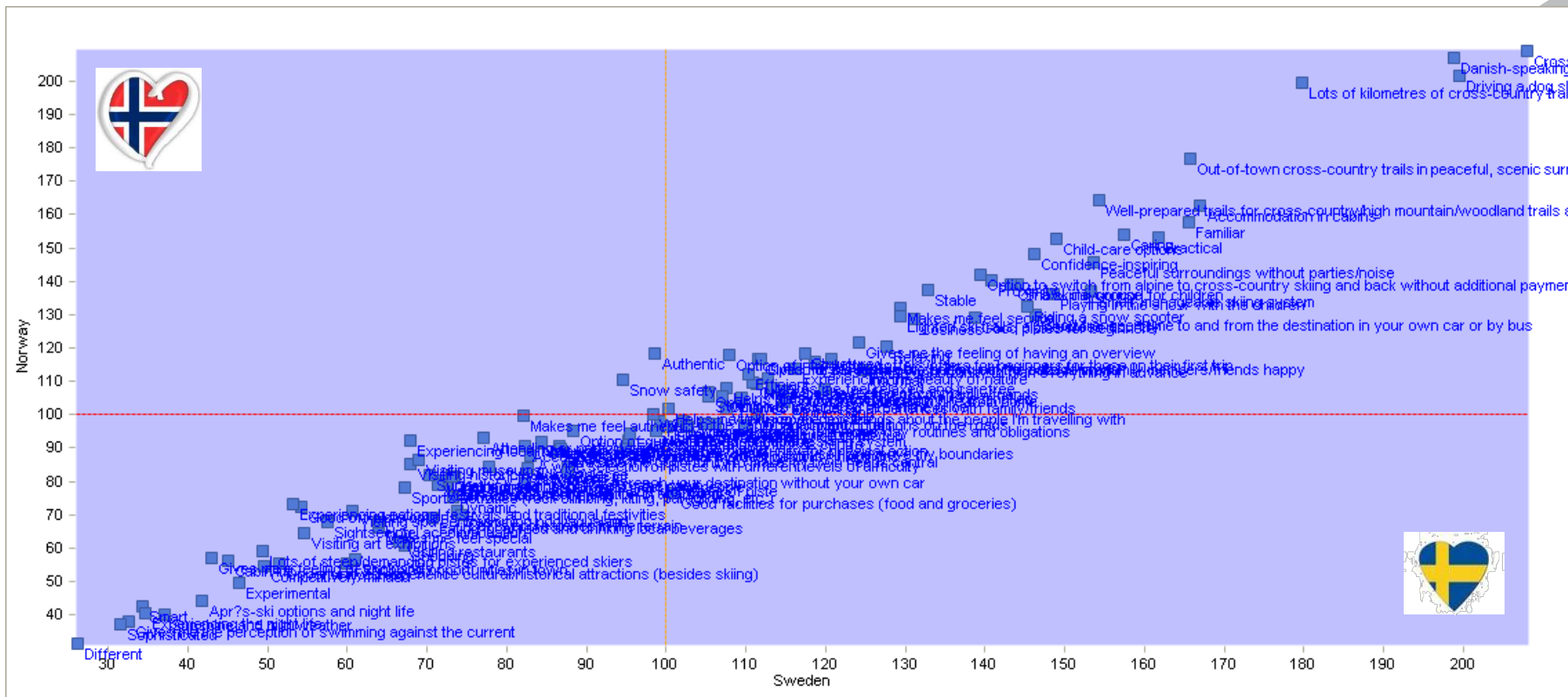
2. Tighten fit with Togetherness

- Even with a better fit with Togetherness, competition with Sweden will remain intense (see next slide).

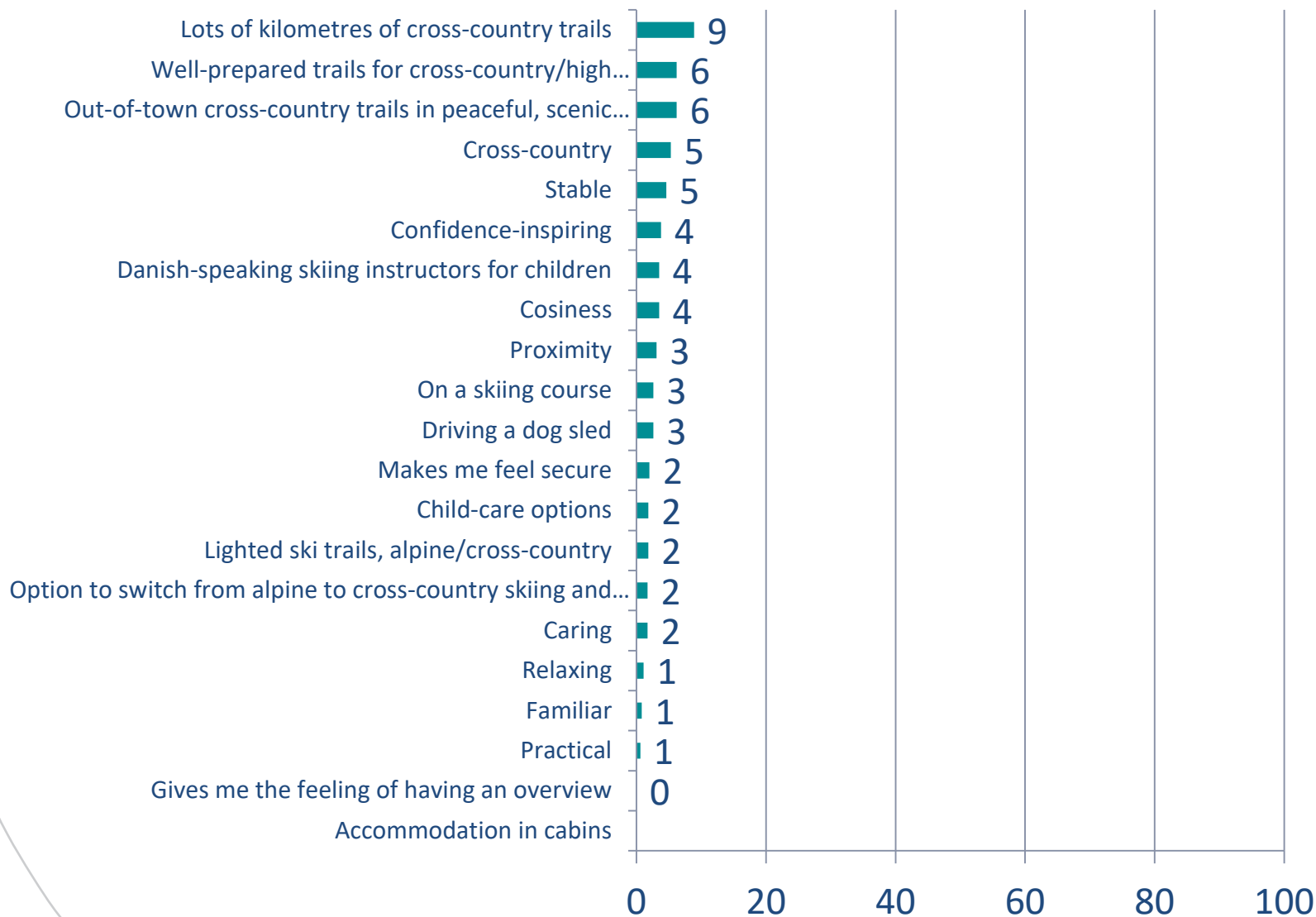
- Therefore it's key to also lead in execution & conversion:
 - ⇒ Planning
 - ⇒ Booking
 - ⇒ Ease of getting to the destination
 - ⇒ Etc.

- Dare to innovate

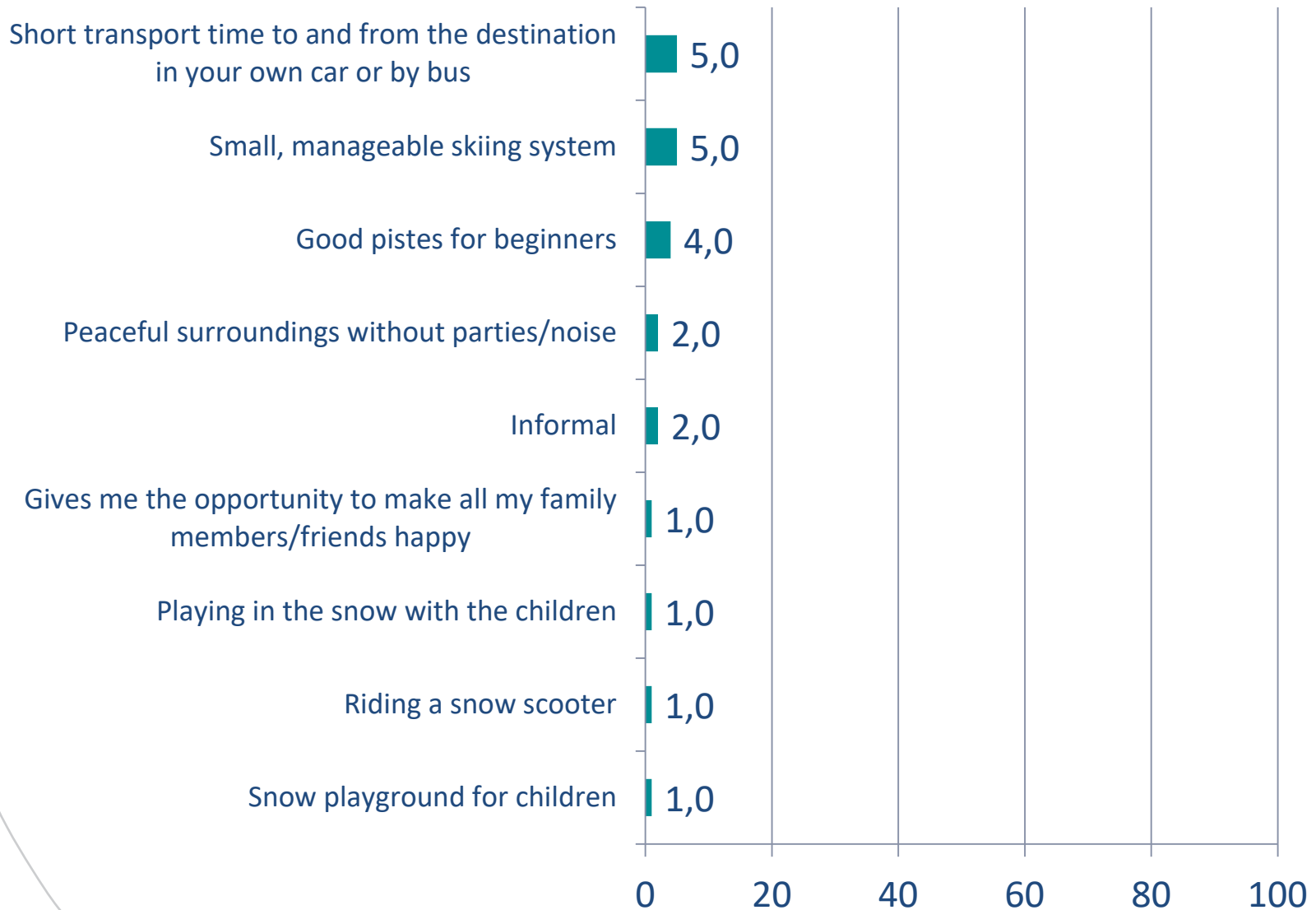
But: fighting Sweden is not easy ...



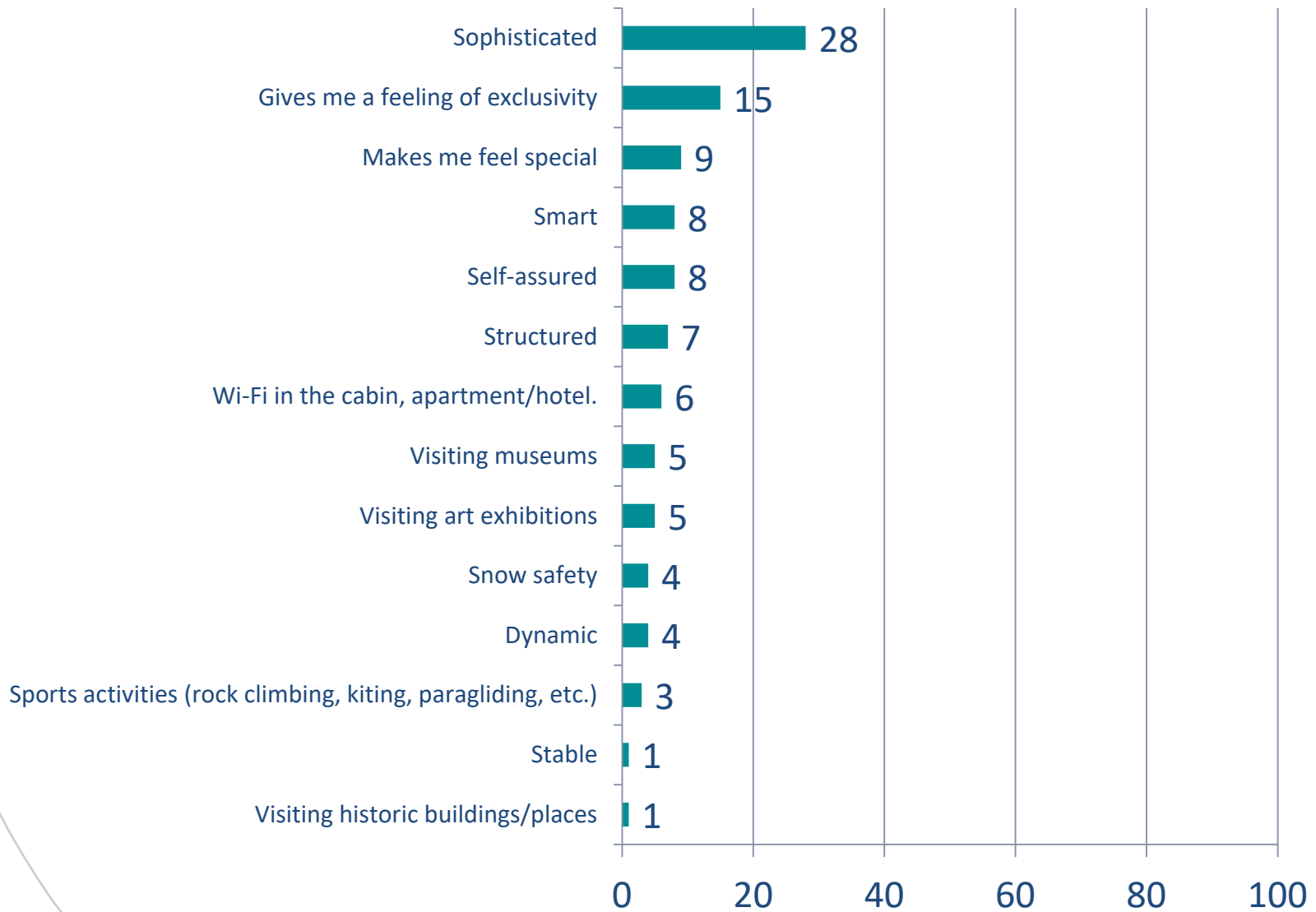
Norway better than Sweden (absolute profile %)



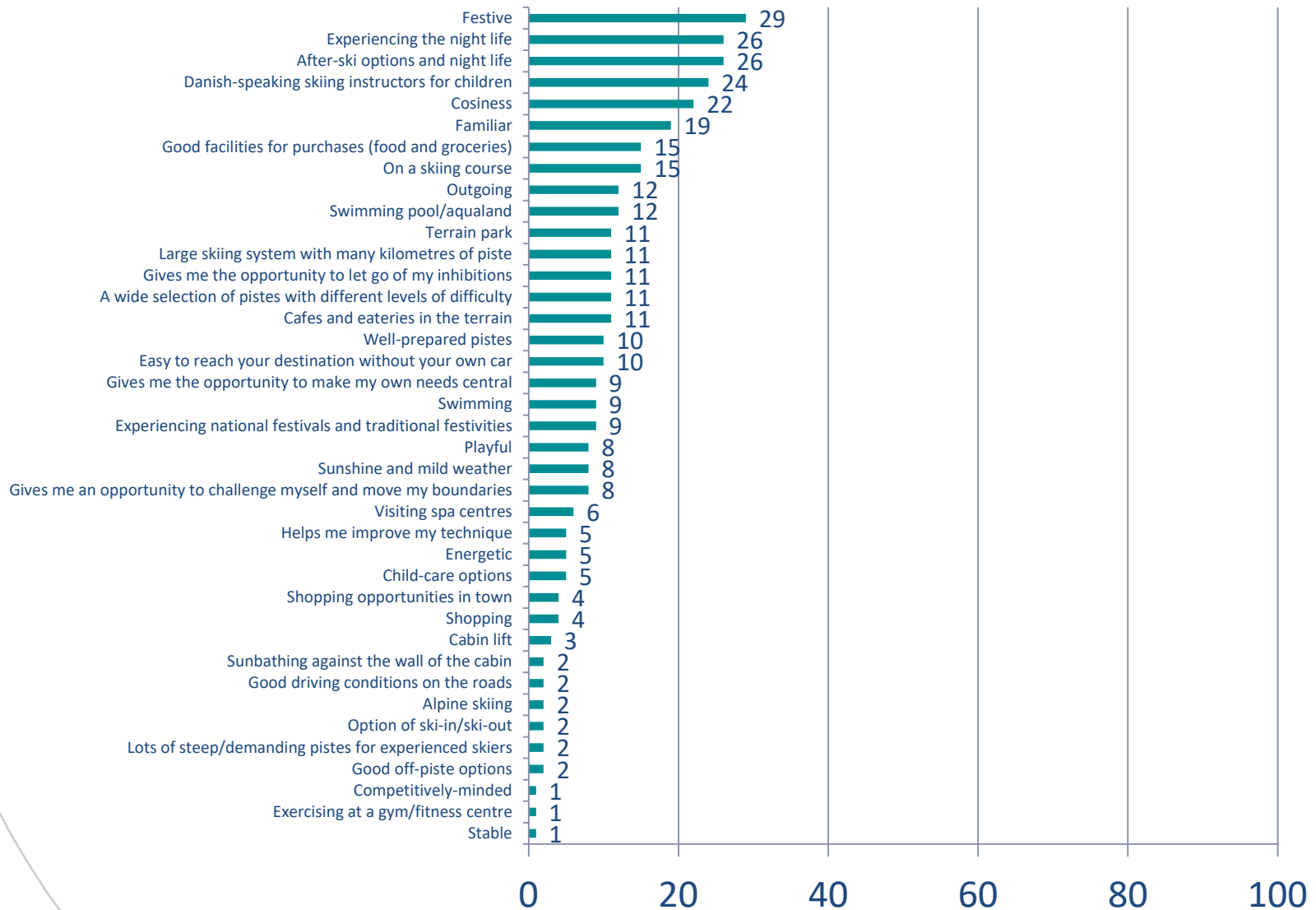
Sweden better than Norway (absolute profile %)



Switzerland better than Austria (absolute profile %)



Austria better than Switzerland (absolute profile %)



3. Find niche targets to beat Alps

- Why?

- ⇒ Togetherness alone doesn't offer enough growth opportunities?
- ⇒ A more complete targeting of other segments could hurt competitive position versus Sweden?

- How?

- ⇒ By exploring smaller segments?
- ⇒ By addressing specific sub-needs of Liberation & Exploration
- ⇒ No mass communication, no national branding
- ⇒ Diverse resort strategy

- Examples

- ⇒ Students (importance of partying!)
- ⇒ Snowboarders
- ⇒ Luxury resort
- ⇒ Alternative destination (of the beaten track)
- ⇒ Real Exploration (for those who really want to challenge themselves)

Holiday Types





Occasions





Trip with female friends (girls' trip) is very much about liberation



Trip with a group of friends (mixed) is very much about liberation and exploration



Trip with partner is very much about togetherness and liberation



Trip with male friends (guy's trip) is very much about liberation and exploration



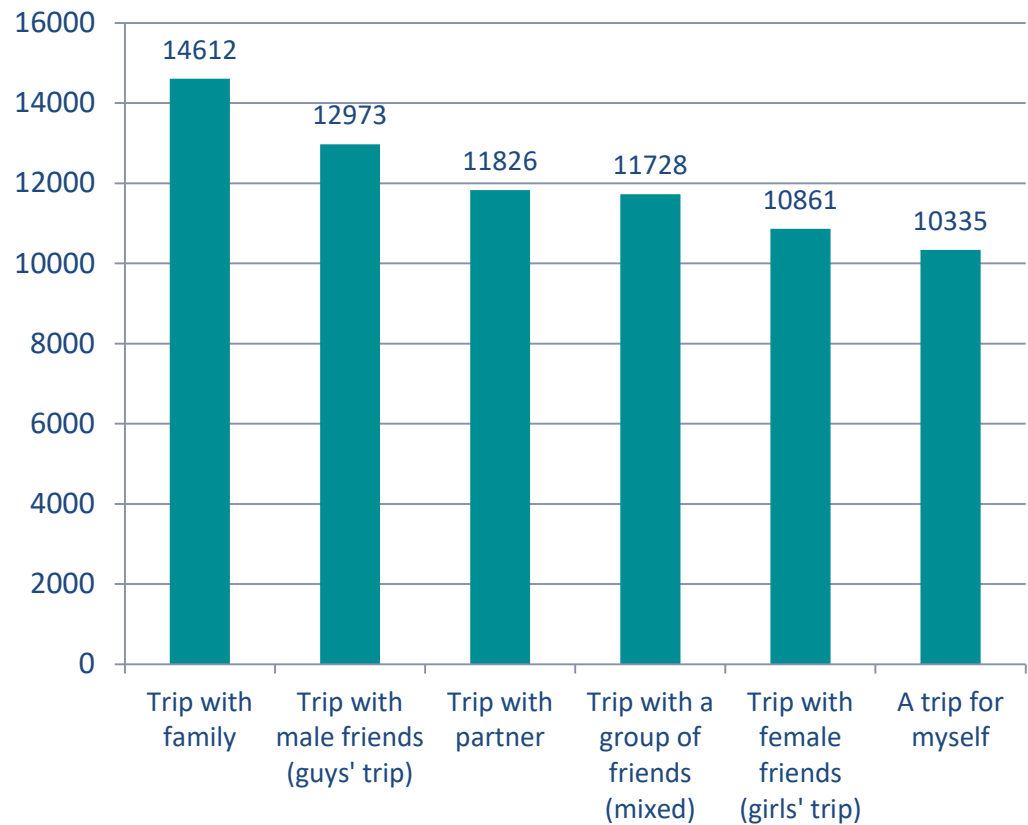
Trip with family is very much about togetherness and liberation



A trip for myself is very much about liberation, harmony, exploration and routine

Average spent for each occasion

Trip with family	14612
Trip with male friends (guys' trip)	12973
Trip with female friends (girls' trip)	10861
Trip with partner	11826
Trip with a group of friends (mixed)	11728
A trip for myself	10335



Trip with family



N=1560

- 5W profile
- Motivations for trip with family
- Role of Norway versus competitive landscape
 - destination versus motivation within trip with family
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for trip with family



Trip with family

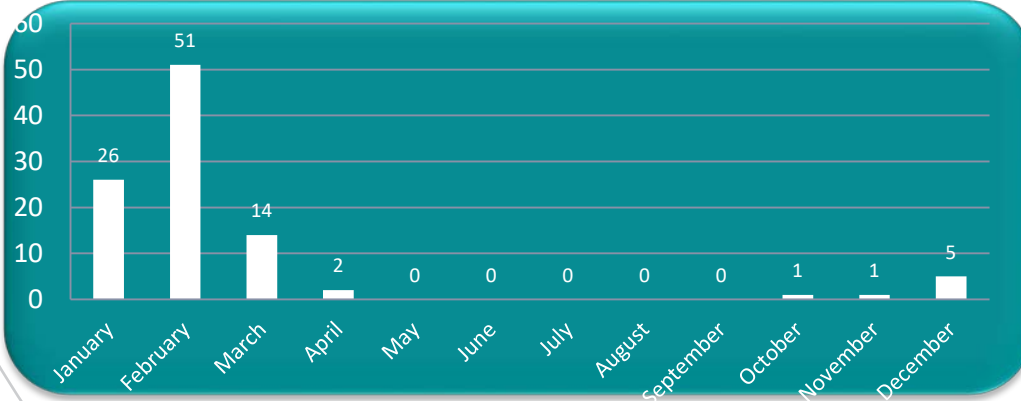
5W profiling

WHO

DEMOGRAPHICS

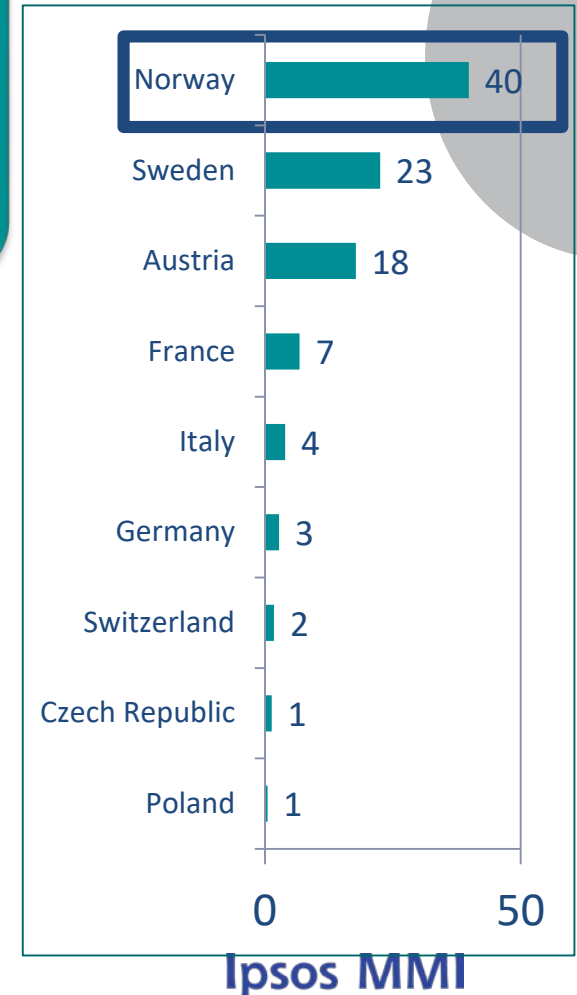
- Age group 40-49 largest share (31%). Age group 18-29 comprise 25%.
- 29% has an income of 700.000-1.000.000 kr.
- Married with children 53% of the share

WHEN



Average length of stay: 7 days

WHERE





Trip with family

5W profiling

HOW

ACCOMMODATION

- Mostly rented or borrowed (42%)
- Rented or borrowed apartment (18%)
- Hotel medium standard (18%)

TRAVEL TO DESTINATION

- Road vehicle (80%)
- Ferry (24%)

WITH WHOM

- Spouse/partner (67%)
- Other family/relatives (54%)
- Children aged 7-14 (47%)

PLANNING & ORGANISATION

- 77% organized individually



Trip with family

5W profiling

WHY

EMOTIONAL BENEFITS

- Gives me shared experiences with family/friends
- Gives me a break from everyday routines and obligations
- It means I have fun
- Gives me the opportunity for physical action
- **Makes me feel closer to my family/friends**

PERSONALITY

- Cosiness
- Fun
- Informal
- **Proximity**
- Energetic

WHAT

PRODUCT CHARACTERISTICS

- Snow safety
- Well-prepared pistes
- Attractive/majestic scenery
- Easy to get around at your destination
- A wide selection of pistes with different levels of difficulty

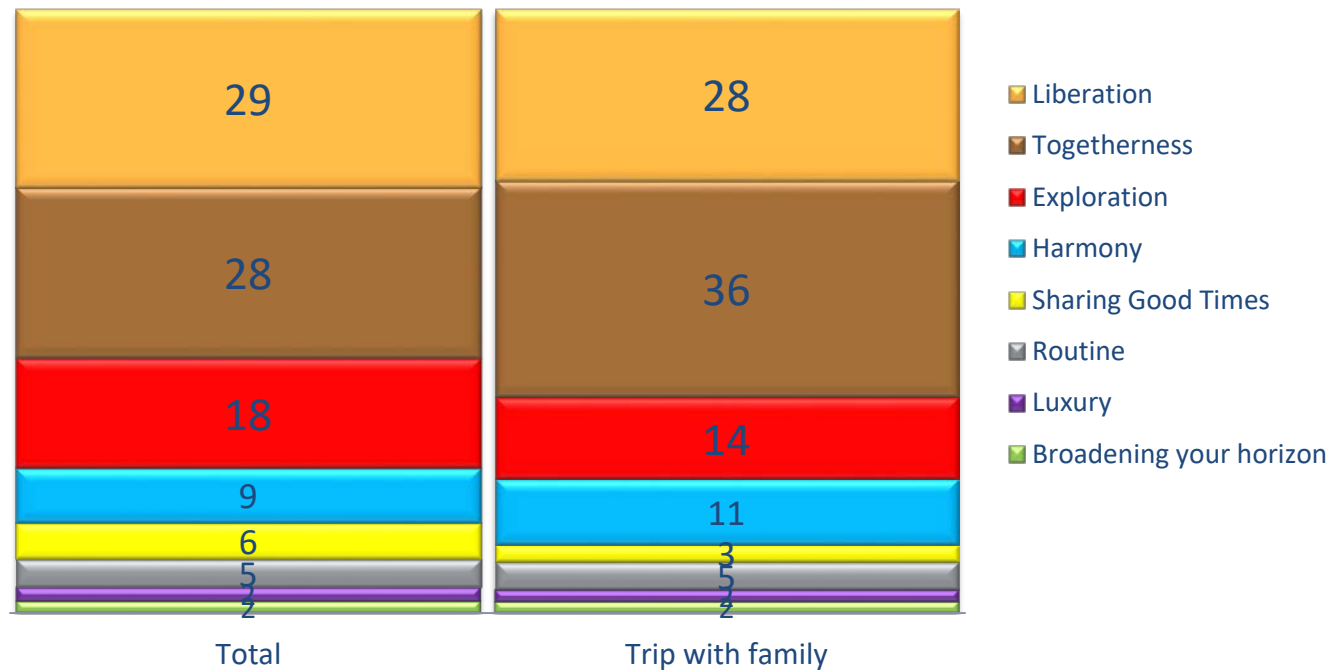
ACTIVITIES

- Experiencing the beauty of nature
- Relaxing
- Alpine skiing
- Eating local food and drinking local beverages
- **Playing in the snow with children**

Note: Core items, bold = differentiating

Why do Danes go on a family trip?

WHY



CONCLUSION:

Togetherness is the dominant motivation to go on a family trip.

Trip with a group of friends



Foto: Peder Austrud

N=544

- 5W profile
- Motivations for trip with a group of friends
- Role of Norway versus competitive landscape
 - destination versus motivation within trip with a group of friends
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for trip with a group of friends



Trip with a group of friends

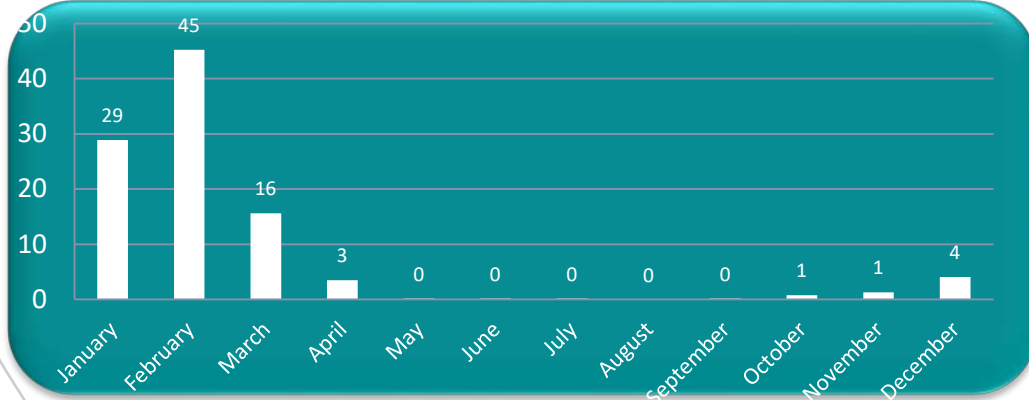
5W profiling

WHO

DEMOGRAPHICS

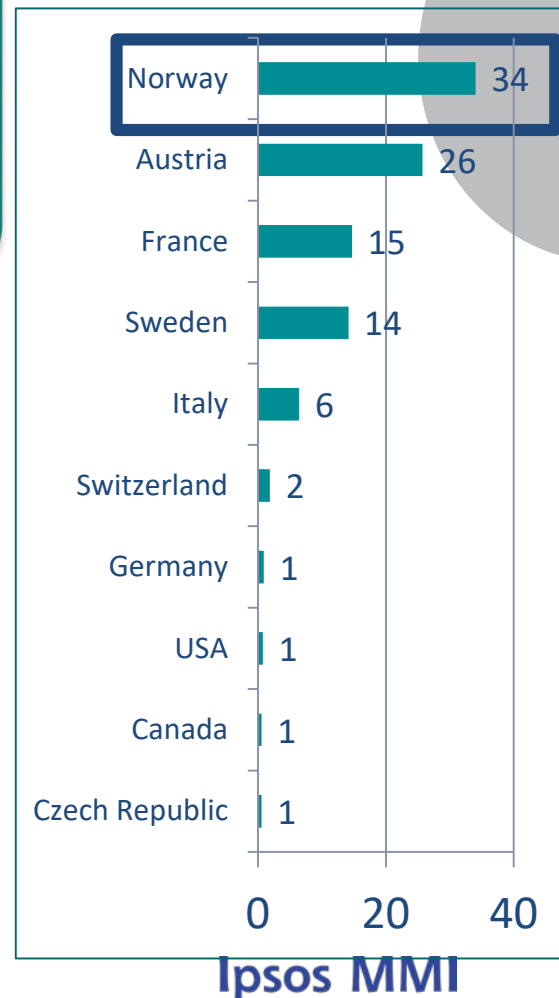
- Female (55%)
- Age group 18-24 largest share (32%). Age group 30-39 (21%).
- Lower income 100.000-400.000 (27%)
- Without children 59% of the share

WHEN



Average length of stay: 6,5 days

WHERE





Trip with a group of friends

5W profiling

HOW

ACCOMODATION

- Mostly rented or borrowed cabin (40%)
- Rented or borrowed apartment (22%)
- Hotel medium standard (16%)

TRAVEL TO DESTINATION

- Bus(53%)
- Road vehicle (37%)
- Ferry (23%)

WITH WHOM

- Friends (89%)
- Spouse/partner (27%)
- Other people (27%)

PLANNING & ORGANISATION

- 49% organized group tour
- 43% self-organized and travelled independently



Trip with a group of friends

5W profiling

WHY

EMOTIONAL BENEFITS

- It means I have fun
- Gives me a break from everyday routines and obligations
- Gives me shared experiences with family/friends
- Gives me the opportunity for physical action
- Makes me feel relaxed and carefree

PERSONALITY

- Fun
- Cosiness
- Informal
- Festive
- energetic

WHAT

PRODUCT CHARACTERISTICS

- Well-prepared pistes
- A wide selection of pistes with different levels of difficulty
- Snow safety
- Attractive/majestic scenery
- Easy to get around at your destination

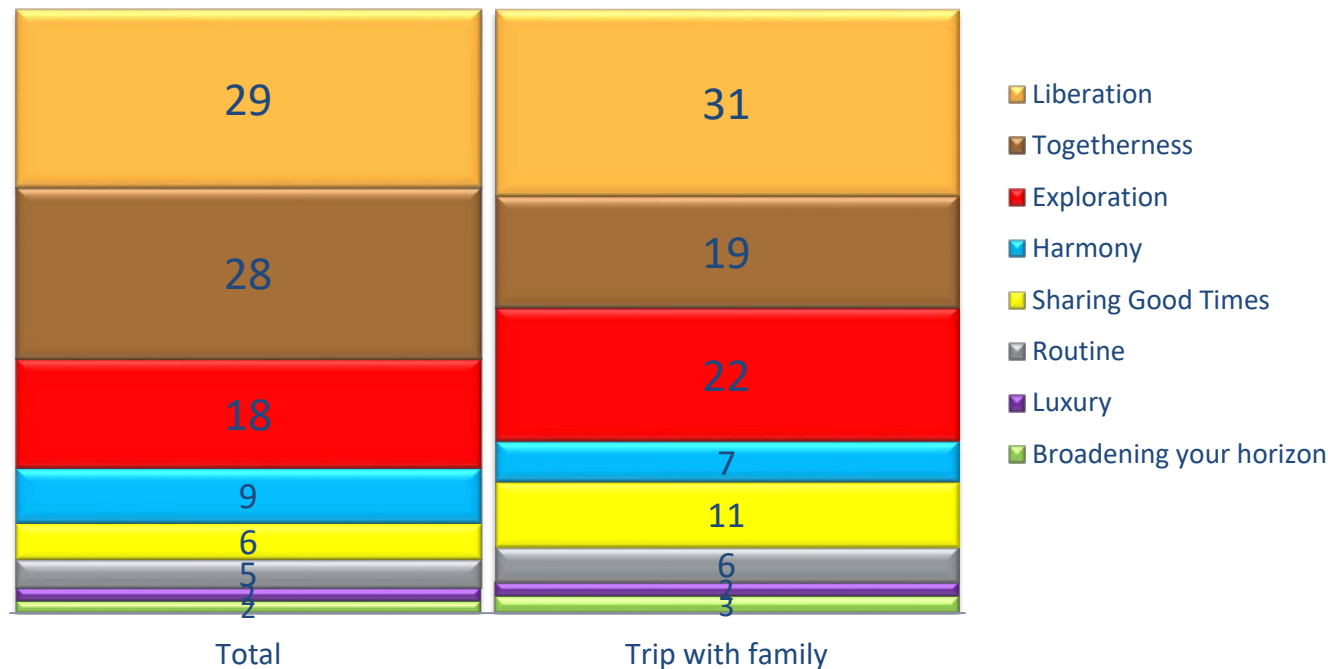
ACTIVITIES

- Experiencing the beauty of nature
- **Alpine skiing**
- Relaxing
- Eating local food and drinking local beverages
- Visiting restaurants

Note: Core items, bold = differentiating

Why do Danes go on a trip with a group of friends?

WHY



CONCLUSION:

Liberation is the dominant motivation to go on a trip with a group of friends. Exploration is larger than Togetherness.

Trip with male friends



N=239

- 5W profile
- Motivations for Trip with male friends
- Role of Norway versus competitive landscape
 - destination versus motivation within Trip with male friends
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for Trip with male friends

Trip with male friends

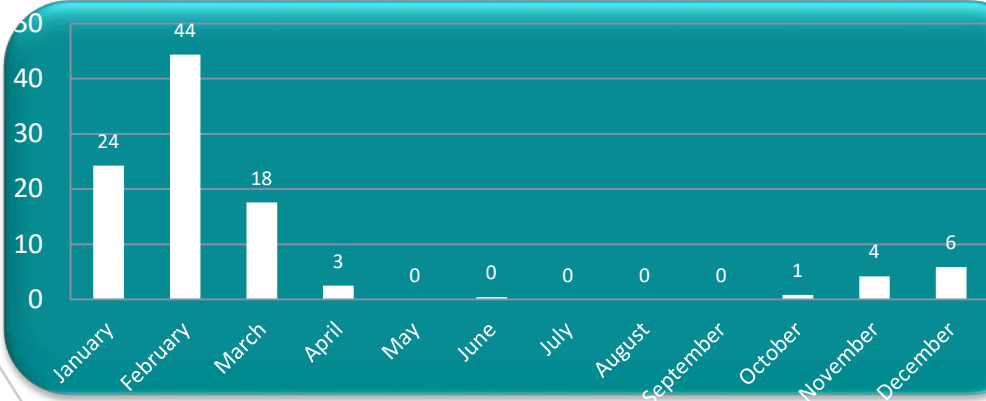
5W profiling

WHO

DEMOGRAPHICS

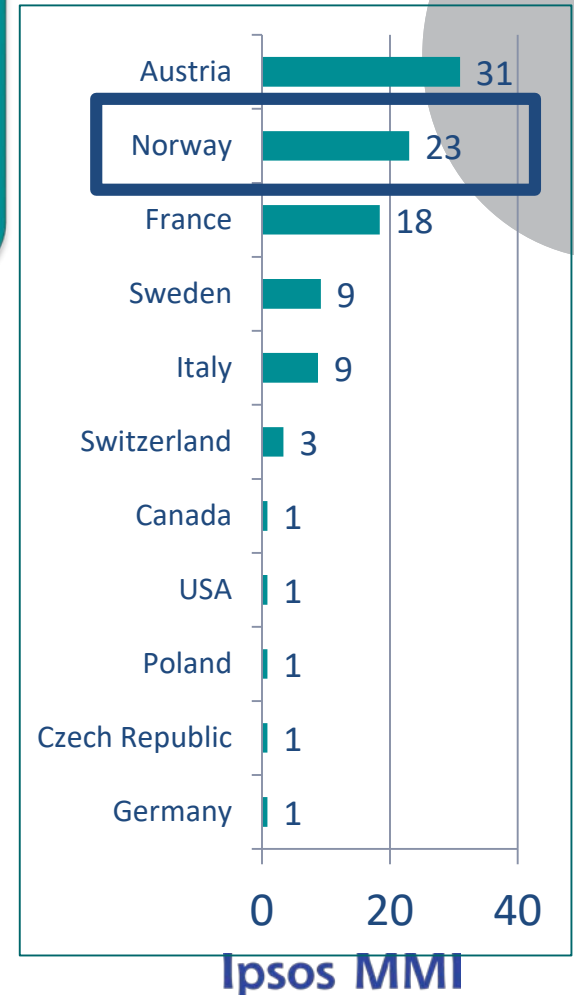
- Age group 30-39 largest share (43%).
- Education 5 years or more (28%)
- Income 800.000-1.000.000 (13%), but relatively evenly distributed

WHEN



Average length of stay: 7 days

WHERE



Trip with male friends

5W profiling



HOW

ACCOMODATION

- Hotel medium standard (31%)
- Rented or borrowed apartment (21%)
- Rented or borrowed cabin (20%)

TRAVEL TO DESTINATION

- Road vehicle (48%)
- Bus (31%)

WITH WHOM

- Friends (94%)

PLANNING & ORGANISATION

- 54% self-organized and travelled independently
- 38% travelled in a group on an organized tour

Trip with male friends

5W profiling



WHY

EMOTIONAL BENEFITS

- It means I have fun
- Gives me the opportunity for physical action
- Gives me a break from everyday routines and obligations
- Gives me shared experiences with family/friends
- Makes me feel relaxed and carefree

PERSONALITY

- Fun
- **Festive**
- Cosiness
- Energetic
- Informal

WHAT

PRODUCT CHARACTERISTICS

- **Large skiing system with many kilometres of piste**
- Snow safety
- Well-prepared pistes
- A wide selection of pistes with different levels of difficulty
- Easy to get around at your destination

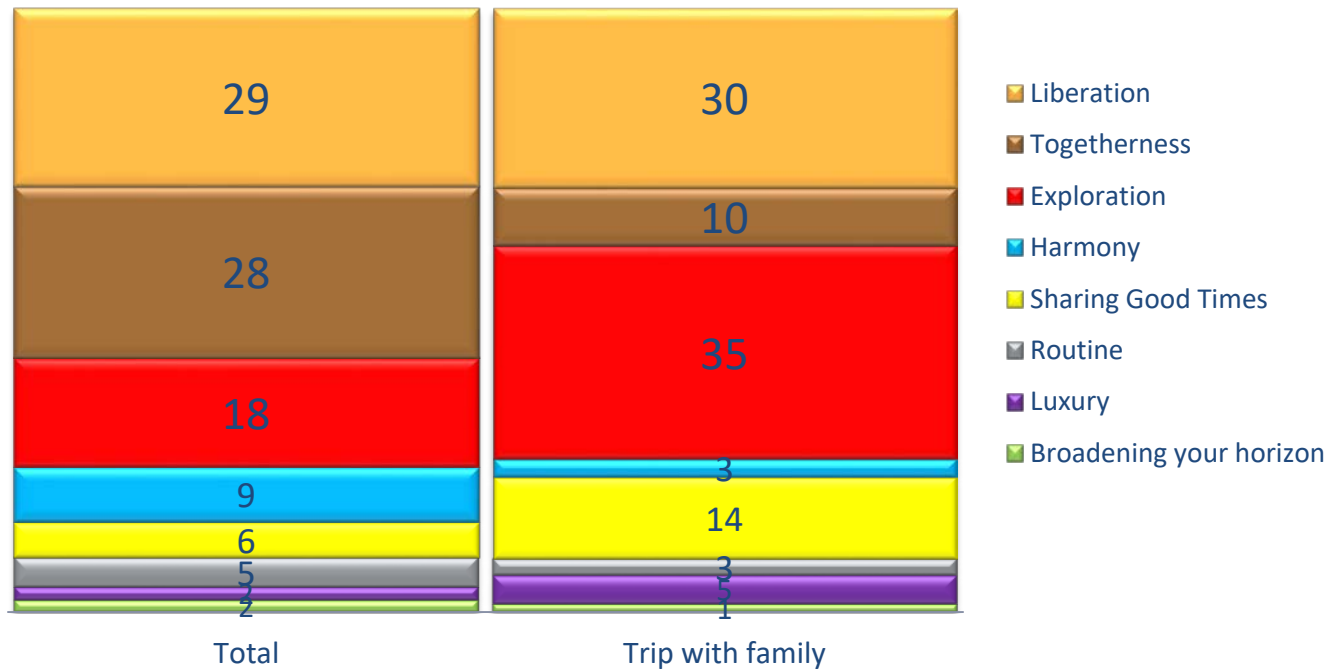
ACTIVITIES

- **Alpine skiing**
- Experiencing the beauty of nature
- **Experiencing the night life**
- Eating local food and drinking local beverages
- Visiting restaurants

Note: Core items, bold = differentiating

Why do Danes go on a trip with male friends?

WHY



CONCLUSION:

Exploration is the dominant motivation to go on a trip with male friends.

Trip with partner



Foto: Peder Austrud

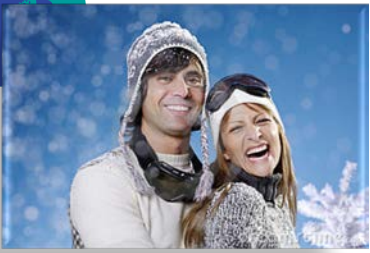
N=208

- 5W profile
- Motivations for Trip with partner
- Role of Norway versus competitive landscape
 - destination versus motivation within Trip with partner
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for Trip with partner

Trip with partner

5W profiling

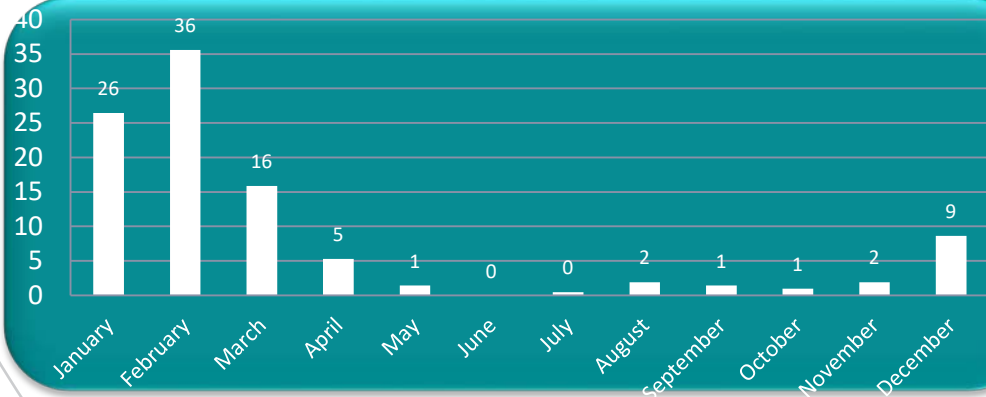
WHO



DEMOGRAPHICS

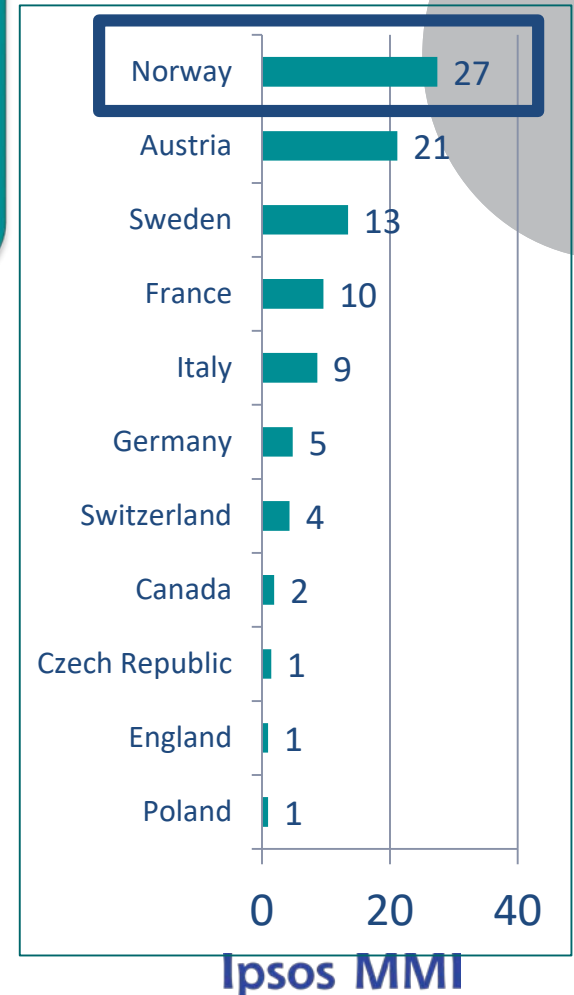
- Age group 30-39 largest share (31%) and age 50-65 (29%)
- Education 3-4 years or more (39%)
- Income 500.000-600.000 (14%), but relatively evenly distributed

WHEN



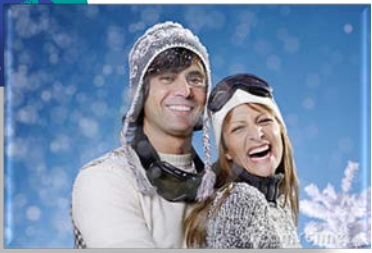
Average length of stay: 7 days

WHERE



Trip with partner

5W profiling



HOW

ACCOMODATION

- Hotel medium standard (32%)
- Rented or borrowed apartment (15%)
- Rented or borrowed cabin (16%)

TRAVEL TO DESTINATION

- Road vehicle (52%)
- Bus (24%)

WITH WHOM

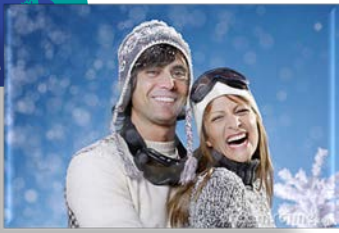
- Friends (91%)

PLANNING & ORGANISATION

- 68% self-organized and travelled independently

Trip with partner

5W profiling



WHY

EMOTIONAL BENEFITS

- Gives me a break from everyday routines and obligations
- It means I have fun
- Gives me the opportunity for physical action
- Gives me shared experiences with family/friends
- Makes me feel relaxed and carefree

PERSONALITY

- Cosiness
- Fun
- Informal
- **Proximity**
- Energetic

WHAT

PRODUCT CHARACTERISTICS

- Attractive/majestic scenery
- Easy to get around at your destination
- Snow safety
- Well-prepared pistes
- Cafes and eateries in the terrain

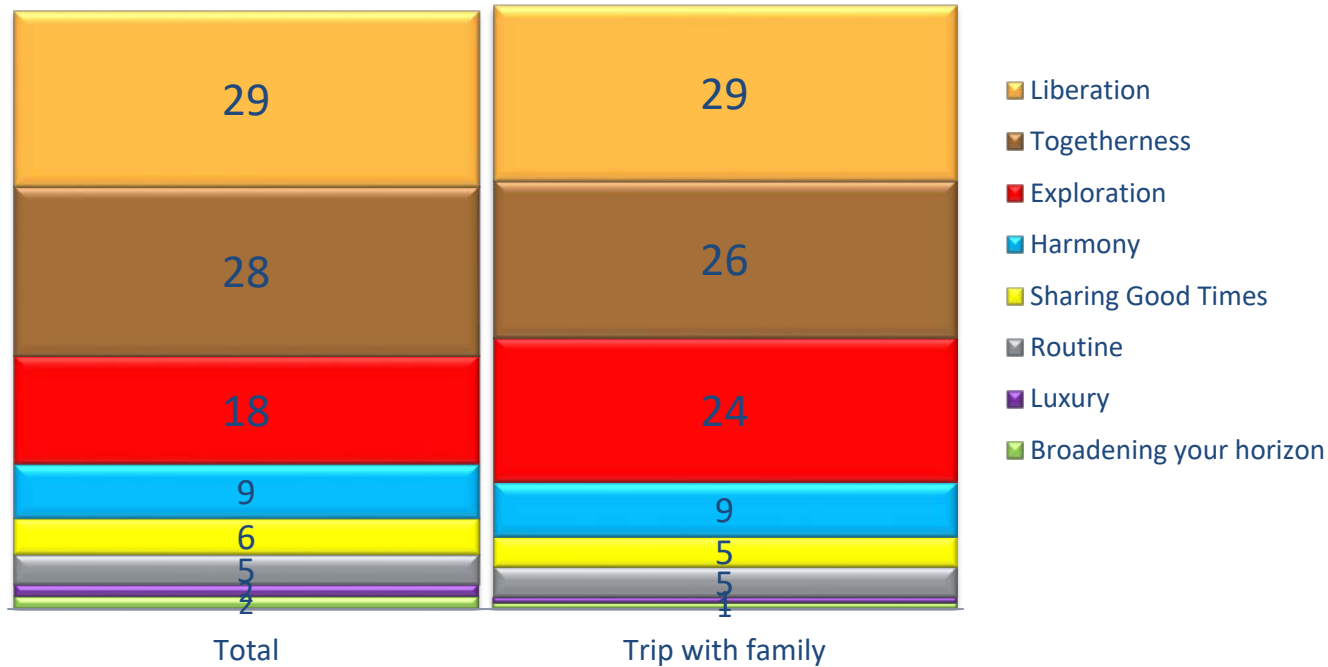
ACTIVITIES

- Relaxing
- Experiencing the beauty of nature
- Eating local food and drinking local beverages
- Visiting restaurants
- Alpine skiing

Note: Core items, bold = differentiating

Why do Danes go on a trip with partner?

WHY



Liberation, Togetherness and Exploration are all strong motivations to go on a trip with partner.

Workshop



- 1. Personification (Togetherness)
- 2a. How to outsmart Sweden?
- 2b. Define niche opportunities versus the Alps

- Name
- Picture
- Who
 - ⇒ Demographics
 - ⇒ Working status, education, family situation
 - ⇒ Values in life
- Motto in life
- Motivations for travelling abroad
- Context of travelling
- Where do they go?
- How do they travel?
- Who are they travelling with?
- What kind of sites do they visit? What activities do they engage in?
- How do they share their experience with their peers?
- What memories will stay with them forever?

The reference target visitor to Norway



**+ VISUALIZE
IDEAL
HOLIDAY
EXPERIENCE**

Finding differentiation springboards



- The ideal position of a destination is to meet the most important motivational attributes in a segment in a stronger way than the competing destinations.
- To have a strong position in a segment, the destination must differentiate itself from the other competing destinations, i.e. Danish ski-tourist must perceive on or more destinations as better than the others on one or more important motivational attributes.
- “The motivational attribute index” shows the most important attributes for the ideal destination in each segment
- “The destination attribute index“ shows what the Danish ski-tourist regards as special attributes with each destination.
- Both indexes should be 120 or higher to be differentiating and important. The higher index, the more differentiating and important!

Strength: For important motivational attributes, Norway has an index above 120 which at the same time is the highest index of all ski destinations

Weakness: For important motivational attributes, Norway has an index lower than the other ski destinations

Opportunity: No destination has a high index on important motivational attributes

Threat: Norway has an index on the same level as other destinations, the index is not very high and there is a good chance that on or more of the other destinations will strengthen their future position, i.e. Index.

Ideal versus actual profile

- The next slides are focusing on the most important attributes (satisfaction, personality, features and activities) for the following segments and destinations:
- Destinations:
 - ⇒ Southern Europe/The Alps: France, Austria, Switzerland and Italy
 - ⇒ Scandinavia: Norway and Sweden
- Segments:
 - ⇒ High volume: Liberation (29,5%), Togetherness (28,4%) and Exploration (18,2%)
 - ⇒ Medium volume: Harmony (9,1%), Sharing a good time (5,9%) and Routine (4,8%)

Ideal = how the Danish ski-tourists describe their ideal ski-destination

Position = how the Danish ski-tourists perceive the ski-destination

Strategy = How a ski-destination should be positioned to meet motivational needs of Danish ski-tourists



Satisfaction and personality

Segment LIBERATION

The index should be **120** or higher to be differentiating and important

Ideal

Satisfaction

- It means I have fun
- Gives me shared experiences with family/friends
- Makes me feel closer to my family/friends
- Gives me a break from everyday routines and obligations
- Gives me the opportunity for physical action

Personality

- Fun
- Festive
- Informal
- Cosiness

Position

Unmet needs and personality

- It means I have fun
- Gives me shared experiences with family/friends
- Makes me feel closer to my family/friends
- Gives me a break from everyday routines and obligations
- Gives me the opportunity for physical action

Needs and personality met by destinations

- Festive
 - Italy 175
 - France 172
 - Austria 159
- Informal
 - Sweden 125
- Cosiness
 - Sweden 131
 - Norway 129

Strategy

Focus on meeting the needs to have fun and action together with family and friends in an festive, cosy and informal atmosphere



Destination features

Segment LIBERATION

The index should be **120** or higher to be differentiating and important

Ideal

- A wide selection of pistes with different levels of difficulty
- Well-prepared pistes

Position

Uncovered features

- Well-prepared pistes

Covered features by destinations

- A wide selection of pistes with different levels of difficulty
 - Italy 133
 - France 126

Strategy

Focus on offering a wide selection of well-prepared slopes with different levels of difficulty



Destination activities

Segment LIBERATION

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Alpine skiing
- Experiencing the beauty of nature
- Relaxing

Position

Unmet activities

- Experiencing the beauty of nature
 - (Norway 114)

Activities met by destinations

- Alpine skiing
 - France 126
 - Italy 124
 - Switzerland 121
- Relaxing
 - Sweden 128
 - Norway 120

Strategy

Focus on the rich possibilities to combine skiing with experiencing beautiful nature.

Position Norway as a destination for alpine skiing and relaxation.



Segment TOGETHERNESS

Ideal

Satisfaction

- Makes me feel relaxed and carefree
- Gives me shared experiences with family/friends
- Makes me feel closer to my family/friends
- Gives me the opportunity to make all my family members/ friends happy
- Gives me a break from everyday routines and obligations

Personality

- Informal
- Caring
- Proximity
- Cosiness

Position

Unmet needs and personality

- Makes me feel relaxed and carefree
- Gives me shared experiences with family/friends
- Makes me feel closer to my family/friends
- Gives me a break from everyday routines and obligations

Needs and personality met by destinations

- Gives me the opportunity to make all my family members/ friends happy
 - Sweden 121
- Informal
 - Sweden 125
- Caring
 - Sweden 158
 - Norway 154
- Proximity
 - Sweden 141
 - Norway 140
- Cosiness
 - Sweden 131
 - Norway 129

Strategy

Focus on meeting the needs to relax from everyday routines closely with family and friends.
And try to improve on some of the met attributes to be better than Sweden



Destination features

Segment TOGETHERNESS

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Good driving conditions on the roads
- Peaceful surroundings without parties/noise

Position

Uncovered features

- Good driving conditions on the roads

Covered features by destinations

- Peaceful surroundings without parties/noise
 - Sweden 154
 - Norway 146

Strategy

Focus on good information about driving conditions and possibilities to enjoy peaceful surroundings (be better than Sweden)



Destination activities

Segment TOGETHERNESS

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Experiencing the beauty of nature
- Cross-country
- Relaxing
- Playing in the snow with the children

Position

Unmet activities

- Experiencing the beauty of nature

Activities met by destinations

- Cross-country
 - Norway 209
 - Sweden 208
- Relaxing
 - Sweden 128
 - Norway 120
- Playing in the snow with the children
 - Sweden 149
 - Norway 136

Strategy

Focus on the rich possibilities to combine skiing with experiencing beautiful nature.

Take a stronger position than Sweden on some of the ideal activities already met by Norway and Sweden.



Segment EXPLORATION

The index should be **120** or higher to be differentiating and important

Ideal

Satisfaction

- Gives me an opportunity to challenge myself and move my boundaries
- Helps me improve my technique

Personality

- Playful
- Fun
- Festive
- Experimental
- Energetic

Position

Unmet needs and personality

- Playful
- Fun

Needs and personality met by destinations

- Gives me an opportunity to challenge myself and move my boundaries
 - France 121
 - Italy 121
- Helps me improve my technique
 - France 128
- Festive
 - Italy 175
 - France 172
 - Austria 159
- Experimental
 - France 126
- Energetic
 - France 148
 - Italy 136
 - Switzerland 120

Strategy

Focus on the combination of great possibilities for ski challenges and possibilities to have fun



Segment EXPLORATION

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Large skiing system with many kilometers of piste
- Lots of steep/demanding pistes for experienced skiers
- After-ski options and night life

Position

Uncovered features

- None

Covered features by destinations

- Large skiing system with many kilometers of piste
 - France 150
 - Italy 149
 - Austria 131
 - Switzerland 129
- Lots of steep/demanding pistes for experienced skiers
 - France 162
 - Italy 149
 - Switzerland 148
 - Austria 133
- After-ski options and night life
 - Italy 141
 - France 140
 - Austria 132

Strategy

The focus is on a wide range of pistes which is difficult for Norway to offer compared to the competitors in the Alps



Destination activities

Segment EXPLORATION

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Alpine skiing
- Sports activities (rock climbing, kiting, paragliding, etc.)
- Experiencing the night life

Position

Unmet activities

- None

Activities met by destinations

- Alpine skiing
 - France 126
 - Italy 124
 - Switzerland 121
- Sports activities (rock climbing, kiting, paragliding, etc.)
 - France 140
 - Switzerland 136
- Experiencing the night life
 - France 162
 - Italy 150
 - Austria 144

Strategy

Focus in on the combination of Alpine skiing, sport activities and party-life.



Satisfaction and personality

Segment HARMONY

The index should be **120** or higher to be differentiating and important

Ideal

Satisfaction

- Makes me feel secure

Personality

- Structured
- Caring
- Confidence-inspiring
- Stable
- Familiar

Position

Unmet needs and personality

- None

Needs and personality met by destinations

- Makes me feel secure
 - Norway 132
 - Sweden 129
- Structured
 - Switzerland 150
- Caring
 - Sweden 158
 - Norway 154
- Confidence-inspiring
 - Norway 148
 - Sweden 146
- Stable
 - Norway 138
 - Sweden 133
- Familiar
 - Sweden 166
 - Norway 158

Strategy

Focus on being perceived as more secure than Sweden by being more caring, confidence-inspiring, stable , secure and familiar .



Destination features

Segment HARMONY

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Danish-speaking skiing instructors for children
- Accommodation in cabins
- Peaceful surroundings without parties/noise
- Snow playground for children
- Child-care options

Position

Uncovered features

- None

Covered features by destinations

- Danish-speaking skiing instructors for children
 - Norway 207
 - Sweden 199
 - Austria 143
- Accommodation in cabins
 - Sweden 167
 - Norway 163
- Peaceful surroundings without parties/noise
 - Sweden 154
 - Norway 146
- Snow playground for children
 - Sweden 144
 - Norway 139
- Child-care options
 - Norway 153
 - Sweden 149

Strategy

Improve some of
the features
Danish ski tourists
are looking for to
be perceived as
better than
Sweden



Destination activities

Segment HARMONY

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Sightseeing
- Visiting national parks
- Playing in the snow with the children

Position

Unmet activities

- Sightseeing
- Visiting national parks

Activities met by destinations

- Playing in the snow with the children
 - Sweden 149
 - Norway 136

Strategy

Focus on the rich possibilities to combine skiing with sightseeing

Take a stronger position than Sweden on being a nice place for families with small children.



Segment
SHARING GOOD TIMES

The index should be 120 or higher to be differentiating and important

Ideal

Position

Strategy

Satisfaction

- Gives me the opportunity to let go of my inhibitions
- Helps me to open up and meet new people
- Helps me to discover new things about the people I'm travelling with

Personality

- Festive
- Open
- Outgoing
- Energetic

Unmet needs and personality

- Helps me to open up and meet new people
- Helps me to discover new things about the people I'm travelling with
- Open

Needs and personality met by destinations

- Gives me the opportunity to let go of my inhibitions
 - France 124
- Festive
 - Italy 175
 - France 172
 - Austria 159
- Outgoing
 - Italy 124
- Energetic
 - France 148
 - Italy 136
 - Switzerland 120

Focus on an open, exploring, festive and energetic atmosphere



Segment
SHARING GOOD TIMES

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Good off-piste options
- Sunshine and mild weather
- After-ski options and night life

Position

Uncovered features

- None

Covered features by destinations

- Good off-piste options
 - France 152
 - Switzerland 133
 - Italy 123
 - Austria 120
- Sunshine and mild weather
 - Italy 147
 - France 135
 - Switzerland 122
- After-ski options and night life
 - Italy 141
 - France 140
 - Austria 132

Strategy

Focus is a
combination of
great alpine-ski
possibilities
together with
having a nice time
with nice weather
and a lot of fun



Segment
SHARING GOOD TIMES

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Snowboarding
- Sports activities (rock climbing, kiting, paragliding, etc.)
- Experiencing the night life
- Visiting museums
- Visiting art exhibitions
- Exercising at a gym/fitness centre
- Riding a snow scooter

Position

- Unmet activities
- Visiting museums
 - Visiting art exhibitions
- Activities met by destinations
- Snowboarding
 - France 126
 - Sweden 120
 - Sports activities (rock climbing, kiting, paragliding, etc.)
 - France 140
 - Switzerland 136
 - Experiencing the night life
 - France 162
 - Italy 150
 - Austria 144
 - Exercising at a gym/fitness centre
 - Switzerland 124
 - France 120
 - Riding a snow scooter
 - Sweden 145
 - Norway 132

Strategy

Focus is on a wide range of sport activities in combination with party life in the evening



Segment ROUTINE

Ideal

Satisfaction

- Gives me the opportunity to plan everything in advance
- Gives me the feeling of control
- Gives me the feeling of having an overview

Personality

- Efficient
- Structured
- Caring
- Stable
- Practical

Position

Unmet needs and personality

- Gives me the opportunity to plan everything in advance
- Gives me the feeling of control
- Efficient

Needs and personality met by destinations

- Gives me the feeling of having an overview
 - Sweden 124
 - Norway 122
- Structured
 - Switzerland 150
- Caring
 - Sweden 158
 - Norway 154
- Stable
 - Norway 138
 - Sweden 133
 - Switzerland 121
- Practical
 - Sweden 162
 - Norway 153

Strategy

Focus on meeting the needs for planning and control
And try to improve on some of the present attributes to be better than Sweden

Segment ROUTINE

Ideal

- All-inclusive trips
- Option of introductory offers/offers for beginners for those on their first trip
- Access to a travel guide at the destination
- Well-prepared trails for cross-country/high mountain/woodland trails and circular trips
- Option to switch from alpine to cross-country skiing and back without additional payment
- Danish-speaking skiing instructors for children
- Child-care options

Position

Uncovered features

- All-inclusive trips
- Option of introductory offers/offers for beginners for those on their first trip
- Access to a travel guide at the destination

Covered features by destinations

- Well-prepared trails for cross-country/high mountain/woodland trails and circular trips
 - Norway 164
 - Sweden 154
- Option to switch from alpine to cross-country skiing and back without additional payment
 - Norway 140
 - Sweden 140
- Danish-speaking skiing instructors for children
 - Norway 207
 - Sweden 199
 - Austria 143
- Child-care options
 - Norway 153
 - Sweden 149

Strategy

Focus on
developing and
marketing for some
of the uncovered
features and try to
improve some of
the covered
features to be
better than
Sweden



Destination activities

Segment ROUTINE

The index should be **120**
or higher to be
differentiating and
important

Ideal

- Sightseeing
- Shopping
- Visiting amusement parks
- Visiting historic buildings/places
- Visiting museums
- Visiting national parks
- Experiencing national festivals and traditional festivities
- Cross-country

Position

Unmet activities

- Sightseeing
- Visiting amusement parks
- Visiting museums
- Visiting national parks

Activities met by destinations

- Shopping
 - Italy 148
 - France 128
- Visiting historic buildings/places
 - Switzerland 120
- Experiencing national festivals and traditional festivities
 - Austria 125
- Cross country
 - Norway 209
 - Sweden 208

Strategy

Focus on developing and marketing for some of the uncovered activities and try to improve some of the covered activities to be better than Sweden

APPENDIX

Danish ski tourists assessment of competing destinations

Sweden
Austria
Switzerland
France
Italy

Danish ski-holidays



Sweden

5W profiling

WHO

DEMOGRAPHICS

- Male and female equal share
- Age group 40-49 has 29% share, 30-39 has 26%, 50-65 has 22%
- Education 3-4 years (36%), , 5 or more years of education (25%)
- 49% married with children
- 28% makes 700.000-1.000.000 kr.

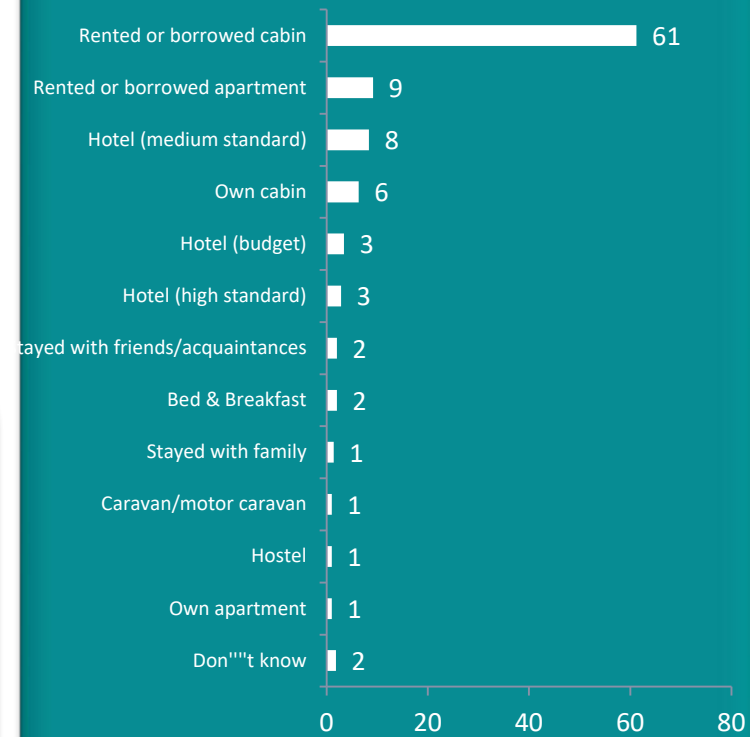
WHEN



Average length of stay Norway: 7 days

WHERE

ACCOMODATION



Sweden

5W profiling

HOW

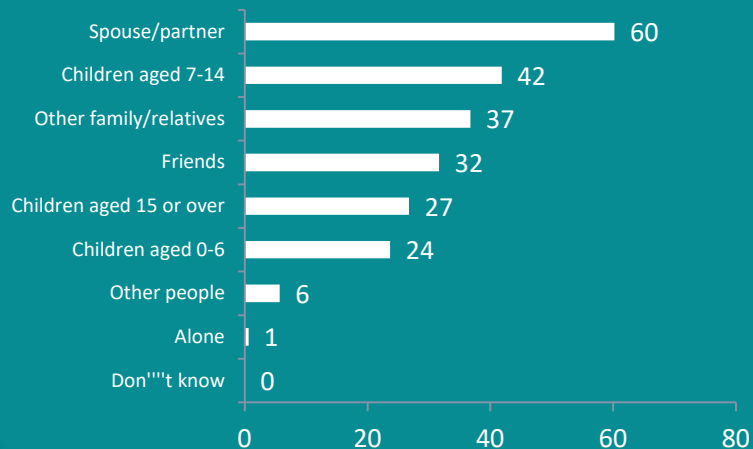
TRAVEL TO DESTINATION

- Road vehicle (82%)
- Ferry (24%)

TRAVEL AT DESTINATION

- Ferry (4%)

WITH WHOM



ORGANISATION

- 81% organized the trip themselves and travelled independently

Sweden –ideal expectations

5W profiling

WHAT

PRODUCT CHARACTERISTICS

- Snow safety
- Well-prepared pistes
- Easy to get around at your destination
- Attractive/majestic scenery
- A wide selection of pistes with different levels of difficulty

ACTIVITIES

- Relaxing
- Experiencing the beauty of nature
- Alpine skiing
- Visiting restaurants
- Eating local food and drinking local beverages

WHY

EMOTIONAL BENEFITS

- Gives me shared experiences with family/friends
- Gives me a break from everyday routines and obligations
- It means I have fun
- Gives me the opportunity for physical action
- Makes me feel closer to my family/friends

PERSONALITY

- Cosiness
- Fun
- Informal
- Proximity
- Energetic

Austria

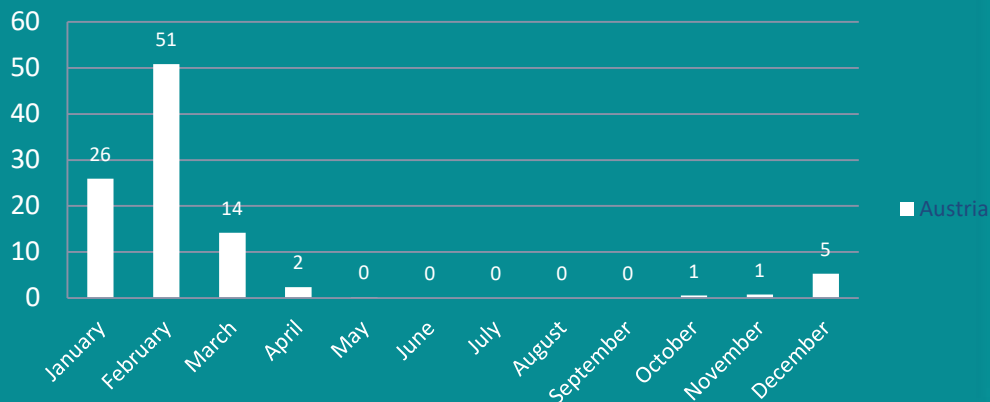
5W profiling

WHO

DEMOGRAPHICS

- Male and female (equal share)
- Age group 50-65 has 26% share, 18-24 has 22% and 40-49 has 21%.
- Education 3-4 years (39%), 23% secondary school
- 43% married with children
- 24% makes 700.000-1.000.000 kr.

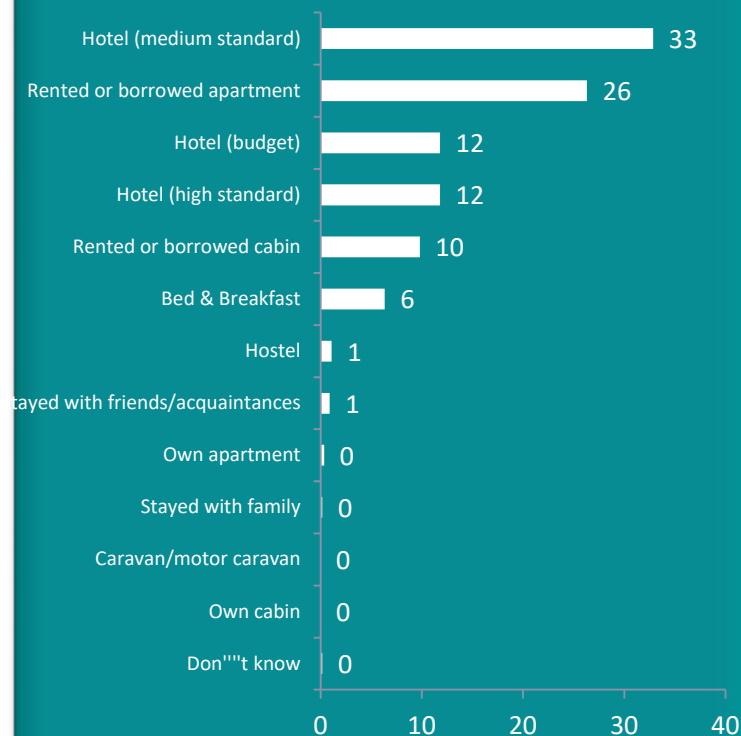
WHEN



Average length of stay Norway: 7 days

WHERE

ACCOMODATION



Austria

5W profiling

HOW

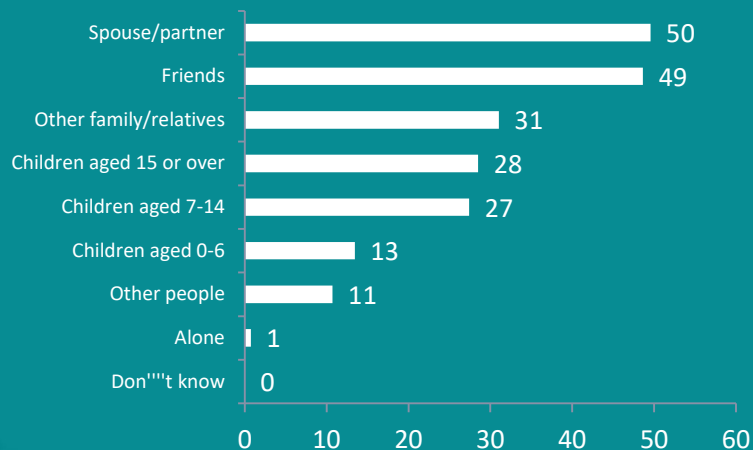
TRAVEL TO DESTINATION

- Road vehicle (54%)
- Bus (28%)

TRAVEL AT DESTINATION

- Own car (49%)
- Bus (38%)

WITH WHOM



ORGANISATION

- 62 % organized individually and travelled independently

Austria - ideal expectations

5W profiling

WHAT

PRODUCT CHARACTERISTICS

- A wide selection of pistes with different levels of difficulty
- Well-prepared pistes
- Snow safety
- Cafés and eateries in the terrain
- Large skiing system with many kilometres of piste

ACTIVITIES

- Alpine skiing
- Experiencing the beauty of nature
- Relaxing
- Eating local food and drinking local beverages
- Visiting restaurants

WHY

EMOTIONAL BENEFITS

- It means I have fun
- Gives me a break from everyday routines and obligations
- Gives me shared experiences with family/friends
- Gives me the opportunity for physical action
- Makes me feel relaxed and carefree

PERSONALITY

- Fun
- Cosiness
- Informal
- Festive
- Energetic

Switzerland

5W profiling

WHO

DEMOGRAPHICS

- Male (63%)
- Age group 50-65 has 24% share, 18-24 has 22%, 40-49 has 15%
- Education 3-4 years (36%), 25 or more years education (31%)
- 34% married with children, 22% single without children
- 31% makes 700.000-1.000.000 kr.

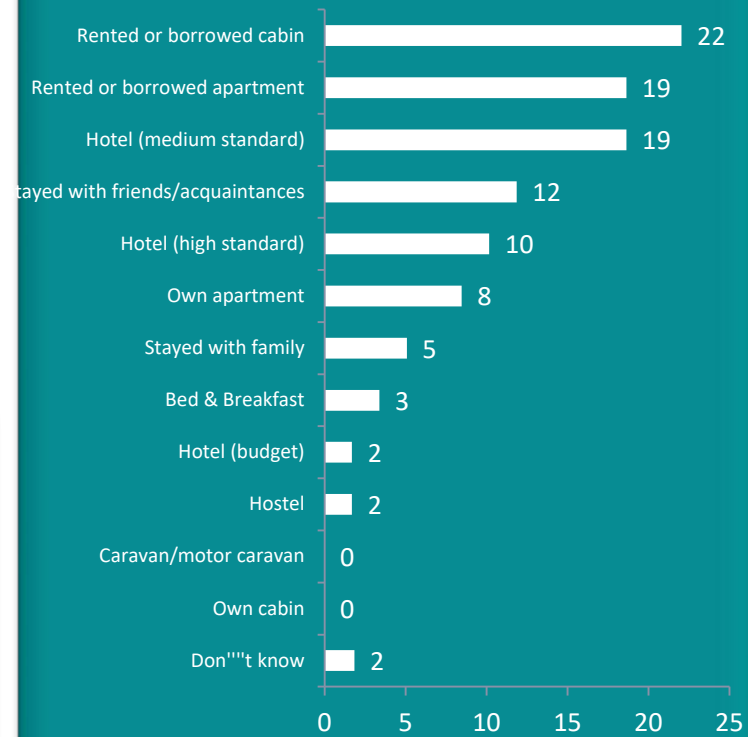
WHEN



Average length of stay Norway: 7 days

WHERE

ACCOMODATION



HOW

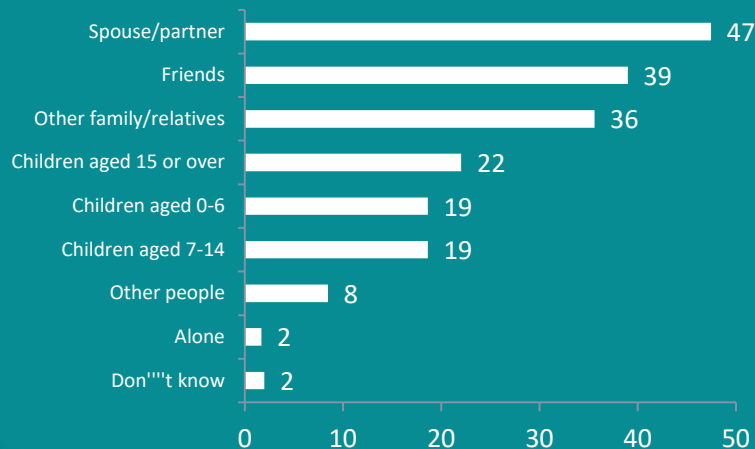
TRAVEL TO DESTINATION

- Road vehicle (63%)
- Scheduled flight (32%)

TRAVEL AT DESTINATION

- Own car (53%)
- Hired car (22%)

WITH WHOM



ORGANISATION

- 75% organized the trip themselves and travelled independently

Switzerland –ideal expectations

5W profiling WHAT

PRODUCT CHARACTERISTICS

- Attractive/majestic scenery
- Well-prepared pistes
- Snow safety
- Easy to get around at your destination
- A wide selection of pistes with different levels of difficulty

ACTIVITIES

- Experiencing the beauty of nature
- Relaxing
- Alpine skiing
- Eating local food and drinking local beverages
- Visiting restaurants

WHY

EMOTIONAL BENEFITS

- It means I have fun
- Gives me shared experiences with family/friends
- Gives me a break from everyday routines and obligations
- Gives me the opportunity for physical action
- Makes me feel relaxed and carefree

PERSONALITY

- Fun
- Cosiness
- Informal
- Proximity
- Energetic

France

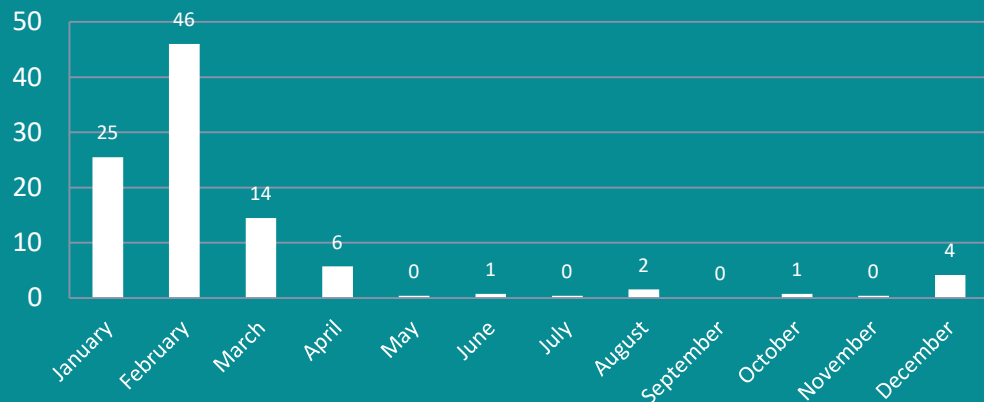
5W profiling

WHO

DEMOGRAPHICS

- Slightly more men (52%)
- Age group 18-24 has 25% share, 40-49 has 21%, 25-29 has 14%.
- Education 3-4 years (38%), 23% secondary school
- 36% married with children
- 26% makes 700.000-1.000.000 kr.

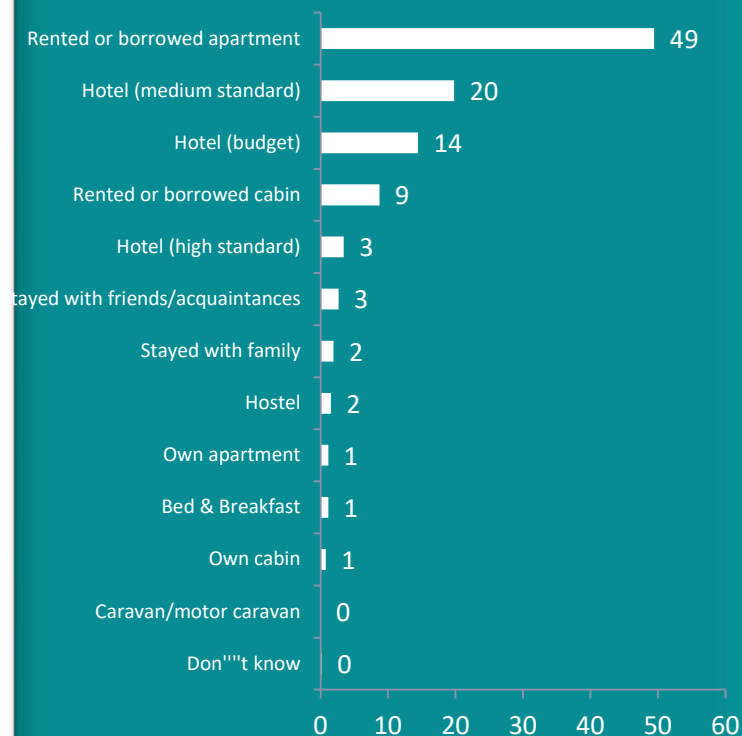
WHEN



Average length of stay Norway: 8 days

WHERE

ACCOMODATION



France

5W profiling

HOW

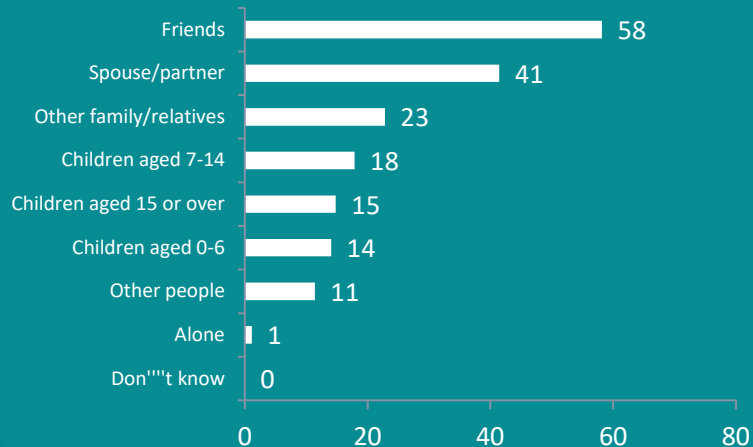
TRAVEL TO DESTINATION

- Bus (44%)
- Road vehicle (32%)

TRAVEL AT DESTINATION

- Bus (31%)
- Other (20%)

WITH WHOM



ORGANISATION

- 48 % organized individually and travelled independently
- 42% travelled in a group on an organized tour

France –ideal expectations

5W profiling

WHAT

PRODUCT CHARACTERISTICS

- A wide selection of pistes with different levels of difficulty
- Well-prepared pistes
- Large skiing system with many kilometres of piste
- Snow safety
- Cafés and eateries in the terrain

ACTIVITIES

- Alpine skiing
- Experiencing the beauty of nature
- Relaxing
- Visiting restaurants
- Eating local food and drinking local beverages

WHY

EMOTIONAL BENEFITS

- Gives me a break from everyday routines and obligations
- It means I have fun
- Gives me shared experiences with family/friends
- Gives me the opportunity for physical action
- Makes me feel closer to my family/friends

PERSONALITY

- Fun
- Cosiness
- Energetic
- Informal
- Festive

Italy

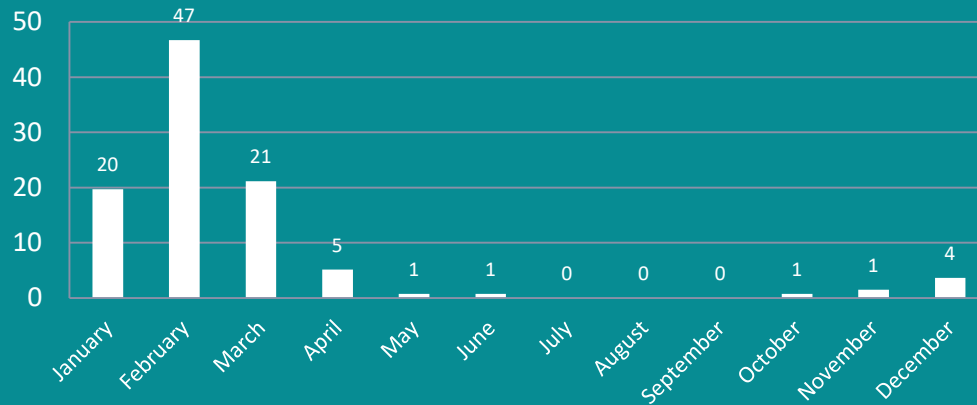
5W profiling

WHO

DEMOGRAPHICS

- More male (64%)
- Age group 50-65 has 34% share, 30-39 has 20%
- Education 5 or more years (33%), 28% 3-4 years education
- 50% married with children
- 27% makes 700.000-1.000.000 kr.

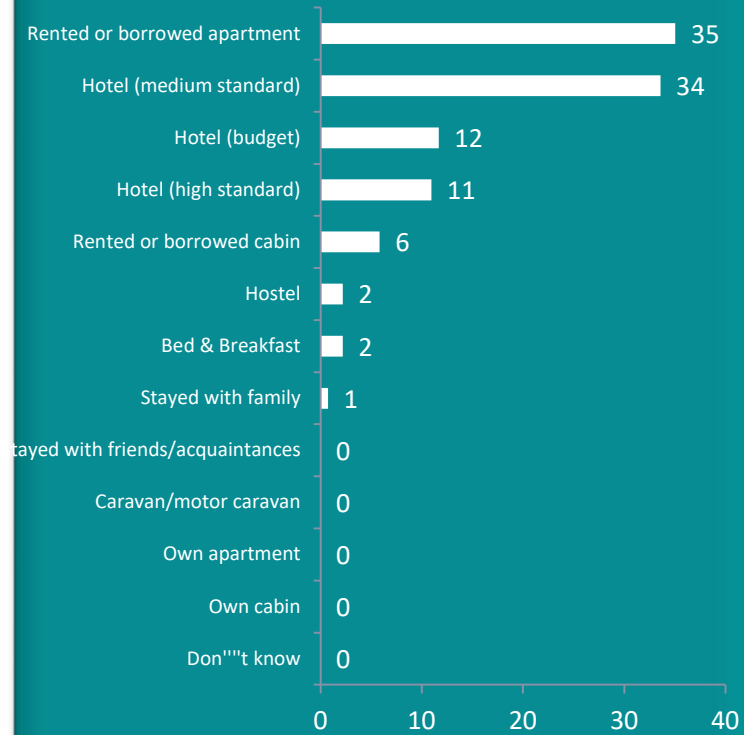
WHEN



Average length of stay Norway: 8 days

WHERE

ACCOMODATION



HOW

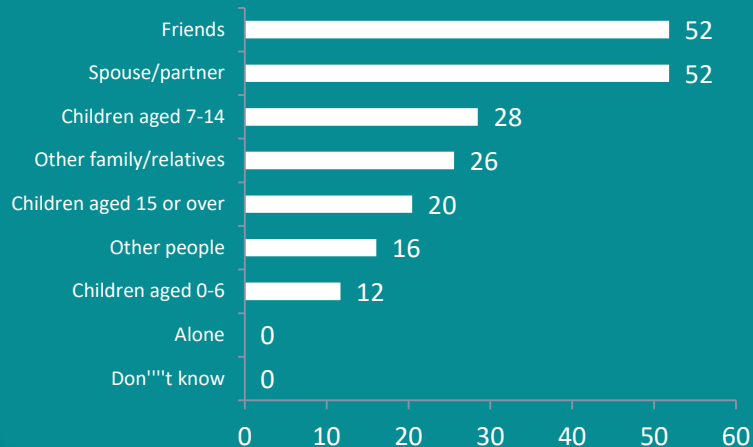
TRAVEL TO DESTINATION

- Road vehicle (41%)
- Bus (31%)

TRAVEL AT DESTINATION

- Bus (42%)
- Own car (33%)

WITH WHOM



ORGANISATION

- 47 % travelled in a group on an organized tour
- 44% organized the trip themselves and travelled independently

Italy –ideal expectations

5W profiling

WHAT

PRODUCT CHARACTERISTICS

- Well-prepared pistes
- Snow safety
- Large skiing system with many kilometres of piste
- A wide selection of pistes with different levels of difficulty
- Cafés and eateries in the terrain

ACTIVITIES

- Alpine skiing
- Eating local food and drinking local beverages
- Experiencing the beauty of nature
- Relaxing
- Visiting restaurants

WHY

EMOTIONAL BENEFITS

- It means I have fun
- Gives me the opportunity for physical action
- Gives me a break from everyday routines and obligations
- Gives me shared experiences with family/friends
- Makes me feel closer to my family/friends

PERSONALITY

- Fun
- Cosiness
- Informal
- Energetic
- Playful

Regions of Denmark



