



Ipsos MMI

Optima 2012

Total report - The Russian market 17.10.12

Basic motivations for going on holiday
Needs based segmentation - Censydiam



Developed for: Innovation Norway



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- 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 study is conducted using Censydiam, Ipsos research tool for motivational research.
- The approach identifies the underlying physiological needs consumers seek to satisfy when travelling abroad on holiday.
- The purpose of the research:
 - ⇒ TO IDENTIFY THE BEST MEANS OF STRENGTHENING THE FUTURE OF THE VISIT NORWAY BRAND AND NORWAY AS A TOURIST DESTINATION
 - ⇒ TO UNDERSTAND THE COMPETITIVE LANDSCAPE AND TARGET NEEDS TO PROMOTE INNOVATION AND COMMUNICATION
- 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.

Executive summary - Main findings

- Fundamental meaning of going on holiday
 - ⇒ In the quantitative study, we found that there are some common denominators across all types of holiday and across all segments:
 - ⇒ 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 segments
 - ⇒ The research has identified eight motivational segments; Liberation, Sharing Good Times, Togetherness, Harmony, Routine, Broadening your Horizon, Luxury and Exploration.
- Norway is best positioned in two motivational segments:
 - ⇒ 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 your 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

Executive summary - Main findings

- Assessment of Norway
 - ⇒ Emotional benefits associated with Norway; Has beautiful nature, Is not too warm, Has environmentally friendly offers, Has unspoiled nature and Has quiet environments
 - ⇒ Personality associated with Norway: Peaceful, Fresh, Cultivated, Explorative and Harmonious
 - ⇒ Destination features associated with Norway: 'Has beautiful nature', 'Has environmentally friendly offers', 'Is not too warm', 'Has unspoiled nature' and 'Has quiet environments'
 - ⇒ Activities associated with Norway: 'Observe beauty of nature', 'Experience wildlife', 'Discover local culture and lifestyle', 'Discover local history and legends' and 'Attend sightseeing tours'

- 12% of the Russians in the sample have visited Norway, which is lower than for Sweden and Denmark. Finland is the strongest competitor.
- However Norway is the most frequently considered Scandinavian holiday destination in Russia. This demonstrates that Norway has unrealised potential.
- 23% of the Germans in the sample are considering going on holiday to Norway in the next three years.

Executive summary – Conclusions

- Despite a slightly differentiated position compared to competing destinations, Norway is not relevant enough to attract a lot of (repeat) visitors
 - ⇒ The proportion of people who have ever visited Norway is low compared to other destinations
 - ⇒ Repeat visiting is also lower than average
- Norway does not clearly 'own' any motivational segment
- However, the current Visit Norway Strategy is broadly on target:
 - ⇒ Across all markets, Norway is often associated with Exploration and Broadening your Horizon.
 - ⇒ But the strength of this association is relatively weak

If Norway wants to attract more visitors, Norway needs to increase its relevance as a holiday destination by targeting relevant consumer needs that distinguish it from competing destinations

Executive summary – Recommendations

1. Reach minimum level of generic expectations

- More social, less isolated experience
- An easy, comfortable travel experience
- Talk about local cuisine
- Offer a wide range of activities and interesting sights
- Importance of cultural differences between the two countries

2. Work ahead to align perception better with 'Exploration' and 'Broadening your horizon':

BE LESS

- Structured
- Gives me a safe feeling
- Restores my sense of harmony and balance
- Allows me to come to my senses
- Peaceful, soothing

BUILD ON

- Active
- Makes me feel liberated
- Makes me stand out from the crowd
- Nature activities (other than skiing)
- Unspoiled nature

BE MORE

- Adventurous, explorative
- Unique
- Daring
- Gives me rich experiences
- Broadens my horizon, my knowledge
- Allows me to discover new and interesting places

1a. Introduction

Background and who we spoke to in the research

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?

COMMUNICATION

Evaluate / Confirm current direction for Norway

Cross-country

Germany

Russia*

The Netherlands

PRODUCTS

Choose target for each holiday type

Skiing

Sightseeing/roundtrip

City trip/city break

Camping

Experience nature

Cottage

Active holiday

* Moscow and St. Petersburg

We have created
qualitative hypothesis
four focus groups in each country

We have
validated them quantitatively
1,200 interviews online in each country

Survey sample - who did we speak to:

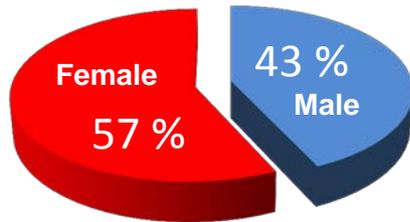
To be included in the study, the respondent had to have been on a holiday abroad that included at least three overnight stays during the past 24 months, and where the trip was not paid for by their employer. The study was conducted in Moscow and St. Petersburg.

The respondent also had to be interested in going on holidays to experience either; dramatic, wild nature and beautiful scenery, or outdoor activities, e.g. skiing, hiking or cycling, or clean and unspoiled nature, or local art, culture and lifestyle.

This of course limits the sample somewhat, as this is not a study of the total population in each market. The reason for this screening is that we wanted to interview prospective Norwegian tourists.

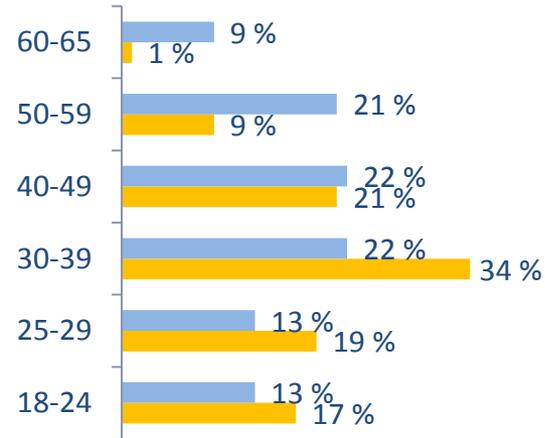
Demographics of the **survey sample** compared with the total population in Moscow and St. Petersburg

Gender



Total population:
Females 52%, males 48%

Age

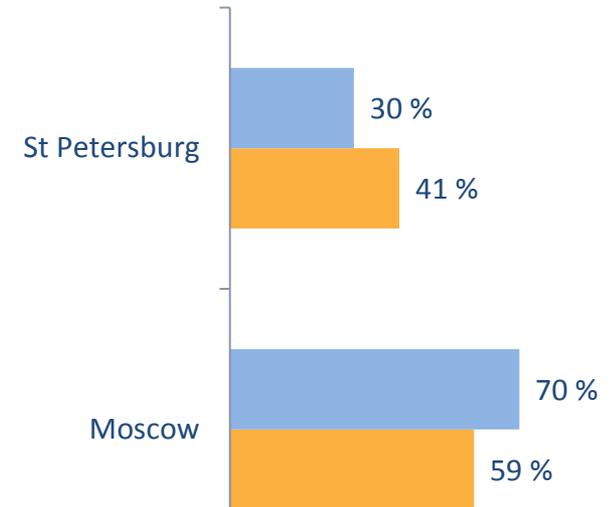


Income

(no income statistics on population available)



Region



1b. Introduction

Basic motivations for going on holiday

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**.





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.

Having a compass or a map helps us to navigate the land of motivations



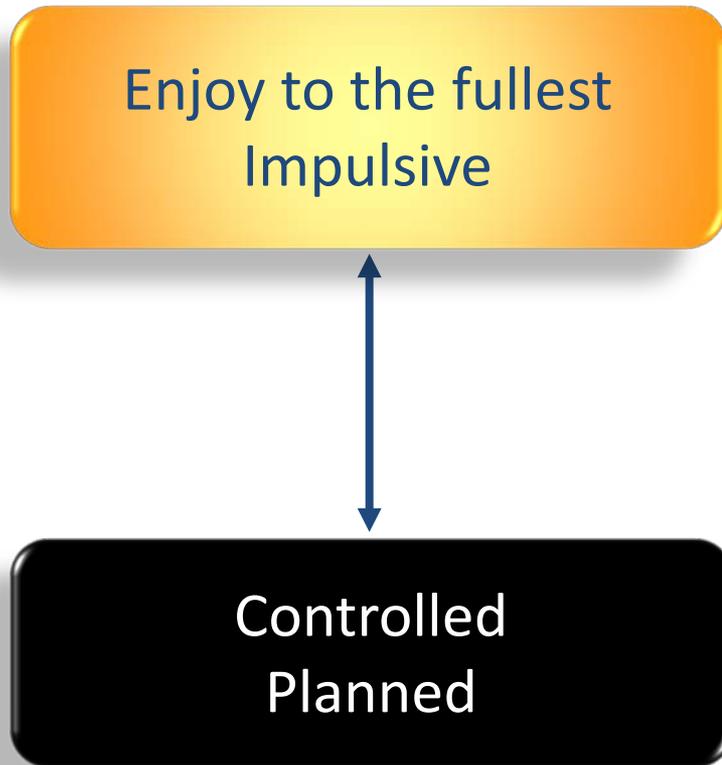
The research helps us to do this...

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



The Censydiam model has two main dimensions; the personal and the social

- *The vertical axis is the personal dimension*



On this side of the axis, we have people who approach the ideal holiday abroad in an open manner. They want to enjoy and explore the new world. They surrender to the new surroundings and enjoy them to the fullest. Within this new world, behaviour is more **impulsive**.

On the other side of the axis, we have people who have a more **controlled** and **restrained** approach to the ideal holiday. Going on holiday for them is accompanied by feelings of insecurity. They try to control these feelings by setting rules and boundaries. A lot of planning is involved in this **structured** way of going on holiday.

The horizontal axis is the second dimension: - *The social dimension*



On this side of the axis, we have people who approach the ideal holiday in an individual manner and try to **distinguish** themselves from their surroundings by means of this new world. They use this escape to deliver a certain performance. These people are relatively active and have a need for expansion, cultivation and discovery.

On the other side of the axis, we have people who are more **socially** involved when escaping into a new world. They try to shape the new world in a relaxed manner. It is a more passive escape in which being together, being sociable and atmosphere are most relevant. Mental relaxation is extremely important.

1c. Introduction

How these needs and motivations can be identified?

This project aims to identify the underlying physiological needs consumers seek to satisfy when travelling abroad on holiday.

- People travel abroad because the holiday or destination in some sense serves certain needs. These needs may be fundamentally physiological (e.g. a place to sleep = hotel).
- But when several options can satisfy the same need, a role for branding arises. People use holidays to satisfy more psychological needs and people choose types of holidays to reflect their personality, convey who they are to others, fulfil a deeper meaning in life, reinforce their own self-concept etc.
- Hence, psychological needs play an important role in consumers' decision-making and influence consumer behaviour.
- In this context, a brand will succeed if it addresses a psychological need better than other brands.
- Hence, stakeholders in the tourism industry need to examine their branding.
 - ⇒ What fundamental psychological need should we target?
 - ⇒ How can we differentiate our brands (products/services) from our competitors'?



Definition of emotional benefits

- What are people looking for? What psychological needs do people have?

- An emotional benefit is often a complex, positive, cognitive statement that our respondents are able to make about themselves due to their use of and attachment to our brand and its features.
- To be more exact, an emotional benefit is nothing more than 'something nice I can say about myself because I use your product or service.'
- The critical differences between emotions and emotional benefits are:
 - ⇒ Emotional benefits are entirely **cognitive**, whereas emotions include a state of physiological arousal.
 - ⇒ Emotional benefits are specifically **attached to brands**, their particular features and marketing applications. In contrast, emotions are more diffuse human physiological reactions with a limited set of simple labels.
 - ⇒ Emotional benefits relate directly and powerfully to enduring **self-concept**, while emotions are more closely associated with temporary and instinctual physiological reactions.
- This last distinction is most important, and it most closely identifies the reason that emotional benefits are so vital to branding.
- In this study, we have a list of 31 emotional benefits that are tested quantitatively.

A holiday to Norway allows me to share good times with others

A holiday to Norway allows me to discover new and interesting places

A holiday to Norway helps me to escape from my hectic life

People don't buy products – they want to satisfy certain needs

We need to shift the focus from products to the tourists (by putting people first)

In order to move from a product focus to putting consumers first, we need to look at WHY people go on holiday. WHAT are they seeking? HOW does the holiday experience represent them? And WHAT connotations are attached to different holiday experiences?

A motivational approach gives a much broader, richer starting point for engaging in conversation with our tourists.

Instead of product focus...



'Rorbuferie'/ holiday in a fisherman's cabin

...focus on motivational benefit



Share good times with others

...or personality

or



Active, explorative and adventurous

This report will give you an insight into the basic psychological needs that you as a stakeholder in the tourism industry need to know about in order to optimise your communication and product development.

We need to understand 'who is doing what, when and where' in the holiday market by answering the question 'why'

Research objective:

- To identify the needs that people try to satisfy with holidays abroad.
- To systematically explore the interrelation with the other 'Ws' defining the context of behaviour.



1. WHY do people go on holiday? What are their needs and motivations?
2. WHO? What differences can we identify with respect to demographics?
- 3&4. WHEN and WHERE? At which specific OCCASIONS do the motivations occur?
5. WHAT? Which destinations best satisfy the different motivations today? What 'qualities' do these destinations have? Which motivations remain relatively less satisfied?

Want to learn more about the model and watch a instructional video, please visit our website at:

<http://w3.ipsos.com/marketing/censydiam/>

Actual holidays, ideal holidays and perception of different holiday destinations

We ask the respondents to:

- Report different aspects of **actual** holidays*
- Describe their **ideal holiday** (given the same destination, time etc. as their actual reported holidays)
- **Perception** of different **countries** as a holiday destination



By doing this, we can understand:

- The **competitive landscape** (Norway vs. other countries)
- Gaps where **Norway has weaknesses** either in people's **perception** of Norway or in relation to their actual holiday **experiences**
- What an **ideal holiday** looks like
- How Norway should be **positioned** (in relation to communication, products and service provision)

* People have different needs depending on the situation. This report is therefore based on **different occasions, rather than different individuals** – by occasion we mean **different holidays**

Can be explained by four different factors



This is about the tourist

▪ Emotional benefits sought (emotional)

- ⇒ An emotional benefit is often a complex, positive statement that our respondents are able to make about themselves due to their use of and attachment to Norway/other destinations and their features.
- ⇒ Examples: A holiday in Norway allows me to share good times with others, a holiday in Norway allows me to discover new and interesting places.

▪ Personality of the destination (emotional)

- ⇒ A destination (brand) personality is usually expressed as an adjective. The purpose of personality attributes is to help personify the destination, give life to it and to give it a distinctive 'brand voice'.
- ⇒ Examples: Fresh, adventurous, safe, relaxed, soothing, active etc.

▪ *To give content to the emotional segments and measure the perception and performance of the destinations, we also asked about the activities and characteristics of destinations.*

▪ Set of activities (functional)

- ⇒ Examples: Fishing, skiing, hiking

▪ Destination features (functional)

- ⇒ Qualities and characteristics of a destination
- ⇒ Examples: Has friendly people, has beautiful nature

This is about the destinations

Using the ideal holiday to understand basic needs for going on holiday

Understanding the four different factors of a holiday (emotional benefits, personality, activities and destination features) is a way of decoding a holiday.

Most human behaviour is explained by the sub-conscious. We should, therefore, use **emotional** factors to understand our needs and motivations.



The segments in this report are defined by statistically grouping (clustering) the emotional benefits sought and the personality of the ideal holiday on a given occasion.

2. Fundamental meaning of going on holiday





We start with cultural context because it is vital for understanding and communicating with the German market

- Culture is all aspects of life, the totality of views, ideas and beliefs shared by individuals within a group of people. Culture is learned, it includes language, values, norms and customs.
- Understanding cultural context helps us to develop products and communication that is better targeted to the local market.
- As you will see from the report, the basic task of holidays is to **'help you escape from your daily life!'**
- You therefore need to know a little bit about German culture to understand how this can be done.
- Consumers respond to values that are culturally ingrained and have a fundamental personal meaning for them as human beings. An understanding of the cultural context in the market therefore enables you to better understand the basic needs they seek to satisfy (i.e. the motivational segments in this report).



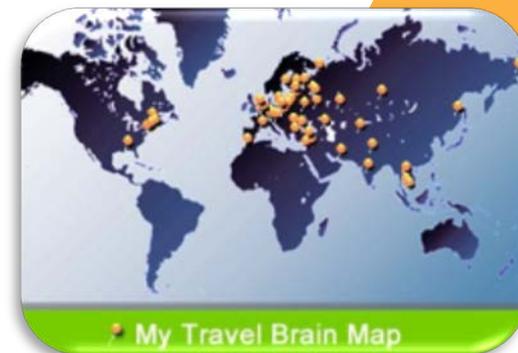
General understanding of The Russian culture



- The following **key traits of Russian culture, life-style and economic environment** are influential on the Meaning & Attitudes towards holidays:
- **The “iron-curtain” made travelling abroad extremely limited and almost impossible for quite a long time**
 - ⇒ The fall of the “iron curtain” AND exposure of Russians to the world dramatically influenced their overall way of living. This brought a variety of opportunities both for business and holiday spending & planning
 - ☞ The “all-the-world-is-open-for-me” feeling resulted in “thirst for travelling, exploring and new impressions”
- **After 2000s – the constant growth of living standards was interrupted by the financial break-down of 2008. Today we start feeling that our financial security is gradually restoring**
 - ☞ This shifts the perception of holidays abroad FROM “nice-to-have / not essential” TO “must have”
- **Rapid development of Internet, “share-experiences” websites and social networking**
 - ☞ This delivers wider opportunities for prompt information “get and share”, consequently simplifying the process of holidays planning & decision-making

General understanding of The Russian culture

- **Society values have shifted towards financial achievements, career-making, wealth etc.**, there is a new trend of starting a family at an older age – after having achieved key financial & personal-success goals
 - ↳ travelling, number of countries visited became one of the key success indicators
- **Hectic life-style, tough struggle for work-and-life balance, prevalence of office workers** with strict, tough but monotonous life schedule
 - ↳ quality rest became a must for “go-on working”
- **Health concerns are growing** – gradual understanding of healthy life-style importance and desire to smoothly incorporate it’s elements into regular routines
 - ↳ Holidays are an integral part of health restore
- **Not everybody speaks English fluently**
 - ↳ Low level of self-orientation in alien places



General perspective of the role of holidays in the Russian culture

- ⇒ Russians are YOUNG world explorers – they travel a lot, BUT have not yet shaped the “culture of travelling” (that means more knowledgeable approach, rather than merely quench hunger for travelling abroad)

- ⇒ Currently Russians are striving to catch-up with the rest of the world and feel themselves integrated world’s citizens. They are eager to develop a more holistic & structural approach to holiday planning:
 - there are certain destinations that come as a first priority - a short-list of countries that most of Russians haven’t yet explored to the full (that means have not been there at least 3-5 times already). These are mainly European countries known for their rich history, variety of Art and architecture masterpieces, like Italy, Spain, France, Germany, Greece, England
 - then comes far-away famous destinations, which are harder to reach, but still aspirational, like USA, Australia, Africa, Peru, Brasilia etc.
 - beach holidays are “a must dish”, ideally combined with sightseeing (again more under the manning of history and art sights RATHER than nature)
 - self-planned, individually-tailored tours is a very young TREND -> Russians are currently more inclined to buy TRAVEL PACKAGES from agencies (except younger generation and more well-off ones). However this trend is going to develop in future

General perspective of the role of holidays in the Russian culture

- ⇒ Russians are YOUNG world explorers – they travel a lot, BUT have not yet shaped the “culture of travelling” (Cont.)
 - the “culture” of planning and arranging is still under development – Many respondents find it hard to book a trip preliminary (tickets, hotels) – thus, spontaneous trips are not yet frequent enough
 - visa application conditions are one of the key influences for trips abroad -> just a limited circle of people have long-term visas (which makes it possible for them to travel freely whenever they want to)
 - “iron curtain” has fallen in state policy, but it has left a strong trace in people’s attitudes and perceptions:

- ⇒ when it comes to deciding where to go or orientation/navigation in the country - Russian tourists feel uncertain, they have to overcome tension and aspire to clear guidance and support



Holidays abroad vs Domestic holidays

Holidays abroad

- **More preparation needed** – visa, preliminary info gathering
- **Fist of all associated with a more comfortable, well-arranged experience (confidence in overall comfort** – service level, hotel quality, safety)
- **More friendly environment that delivers better relaxation**
- **More aspirational and saturating the thirst for *EVERYTHING* abroad** (remember the times living behind the “Iron curtain”), sense that it might be not available some day once again
- **Expectations to get exposed to higher living standards and quality of life, and bring back ideas and aspirations for enhancements**

Domestic holidays

- Initially perceived as **less comfortable, more «wild», self-planned and arranged kind of rest**
- **Connected with sense of challenge and compromise** in terms of comfort level, arrangements, service, planning and value for money
 - Less relaxed on such things as service, room, transport etc
- **Sense of national pride, getting to one’s roots visiting «must-see» places of motherland (both human-created sights and nature)**
 - tours along the Golden Ring – Russian cities famous for historical sights
 - lots of beautiful and aspirational wild nature sights (Baykal lake, Altay, Karelia) that are hard to reach due to poor infrastructure development
- **Familiar, close, always at hand, no need for lots of planning and arrangements**

The background of the slide is a dense school of goldfish. Most are bright orange-gold, but one fish in the center is a vibrant blue. The fish are swimming in various directions, creating a sense of movement.

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 fulfil these criteria irrespective of the type of holiday

In Russia it's also about learning

Irrespective of segments or types of holiday, there are some factors that are on the top of Russian tourists' expectation lists for their ideal holiday

WHAT

are they looking for?

DESTINATION FEATURES

- Has beautiful nature
- Has friendly people
- Has interesting sights
- Has good local cuisine
 - Is safe
- Has good service

ACTIVITIES

- Taste local food and drink
- Attend sightseeing tours
- Observe the beauty of nature
- Visit historical buildings/sites
- Discover local history and legends

WHY

are they travelling

EMOTIONAL BENEFITS

- Allows me to discover new and interesting places
 - Allows me to broaden my horizon
 - Helps me live life to the fullest
 - Enriches my view on the world
- Helps me escape from my hectic life

PERSONALITY

- Friendly
 - Cozy
- Harmonious
- Outgoing
- Authentic

*n = all holidays profiled in the quantitative sample.
The slide shows the most important factors*

Irrespective of segments or types of holiday, there are some factors that are on the top of Russian tourists' expectation lists for their ideal holiday

ACCOMODATION

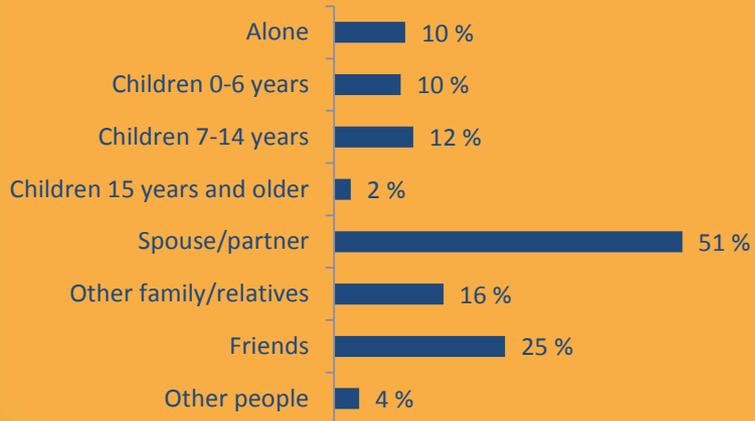
- Hotel medium standard (35%)
- Hotel high standard (15%)
 - Hotel budget (14%)
- Cabin/holiday home (10%)

TRAVEL TO DESTINATION

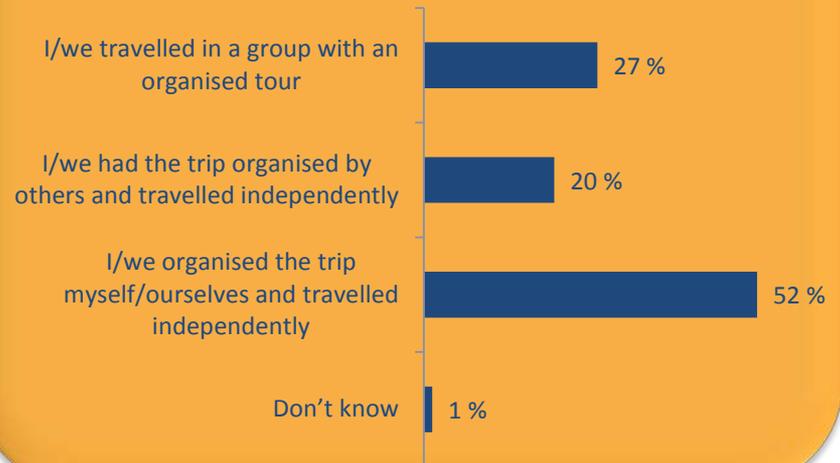
- Scheduled plane (32%)
 - Car (30%)
 - Bus (25%)
- Charter plane (25%)

HOW do they travel

WITH WHOM

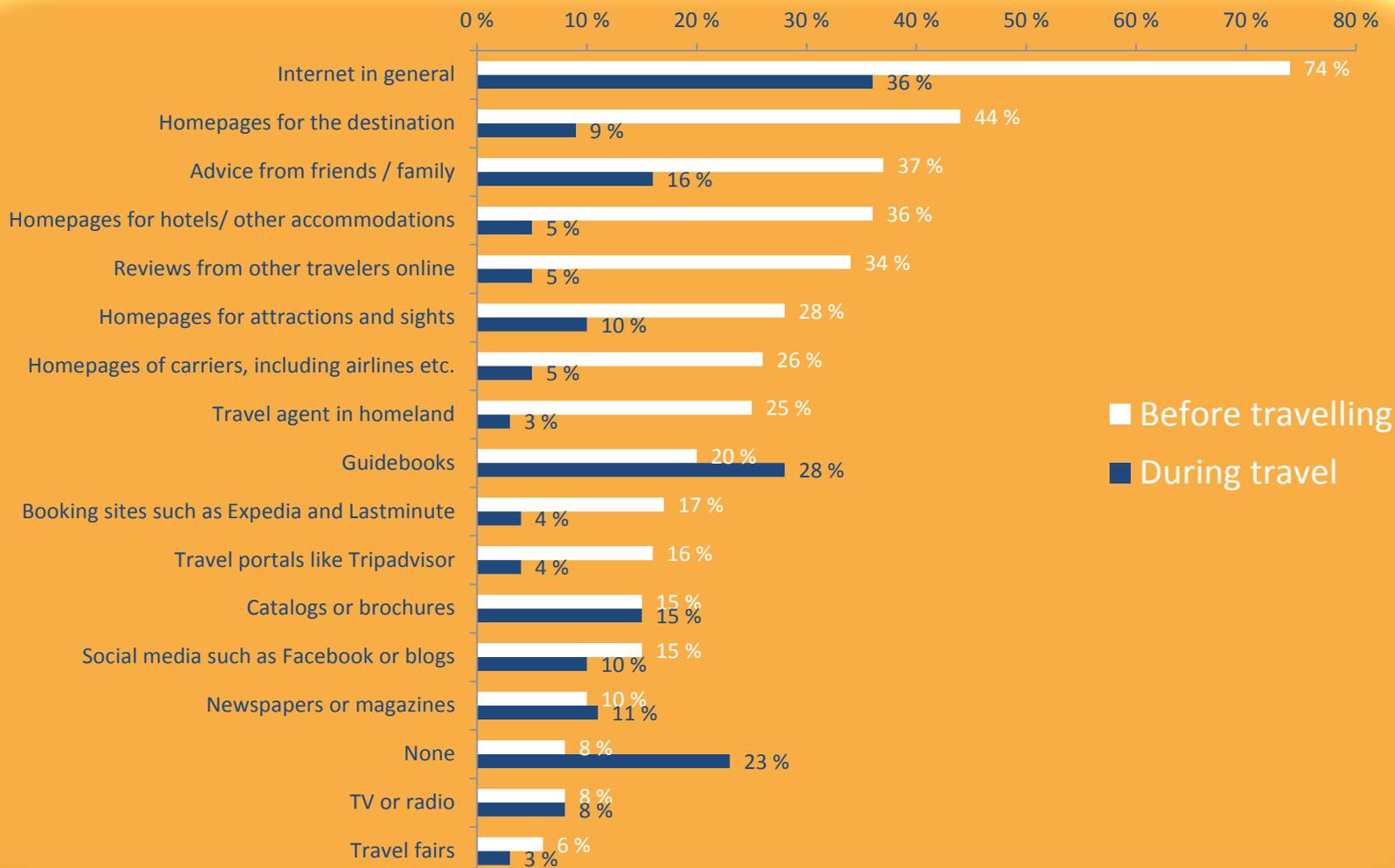


ORGANISATION



What information sources Russian tourists use before traveling and during the trip

Online sources are most important before the holiday, but guide books are still the most important source during the holiday



n = all holidays profiled in the quantitative sample.

3. The segments



All the holidays reported in the Russian sample

The reason why Russian tourists travel - The essence and size of each segment*

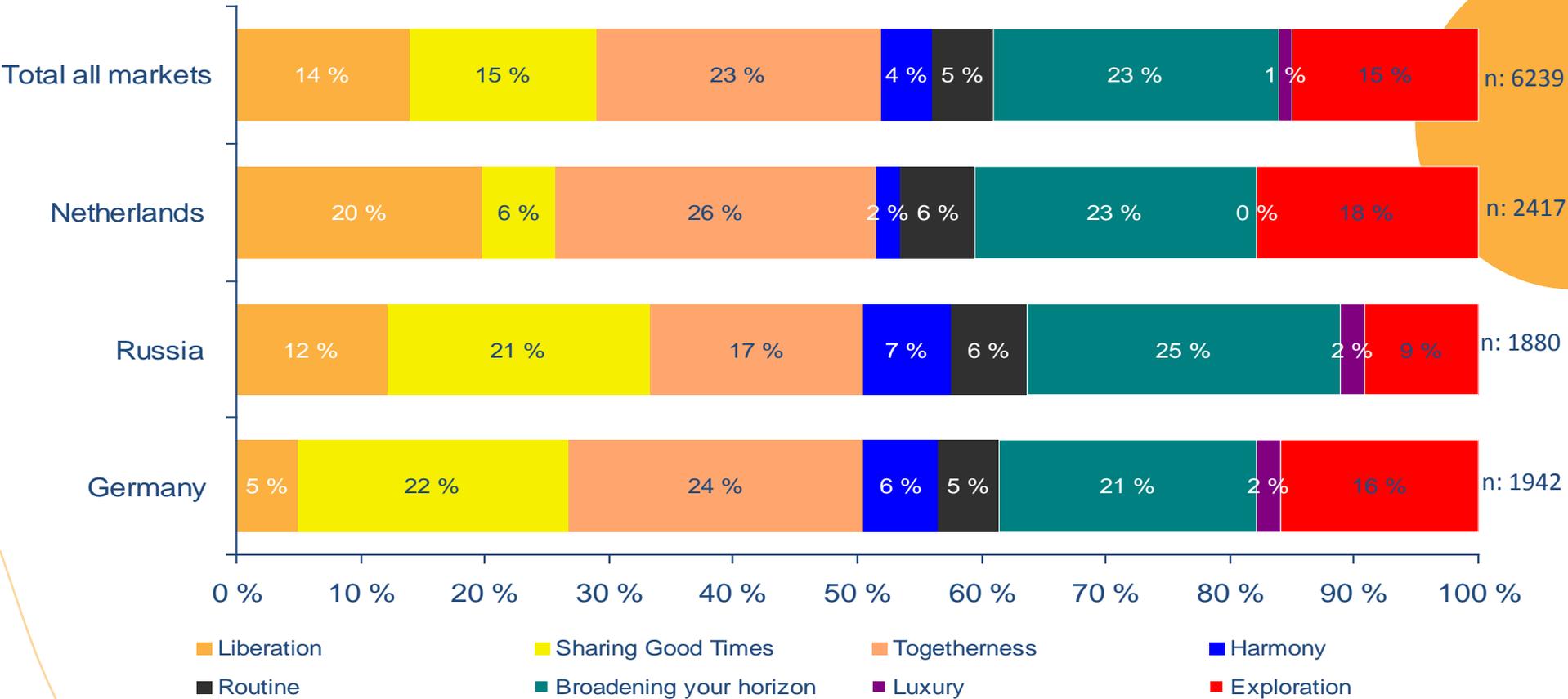


* *Share of overnight stays:* The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays



Segment share by market

- All destinations – all types of holiday

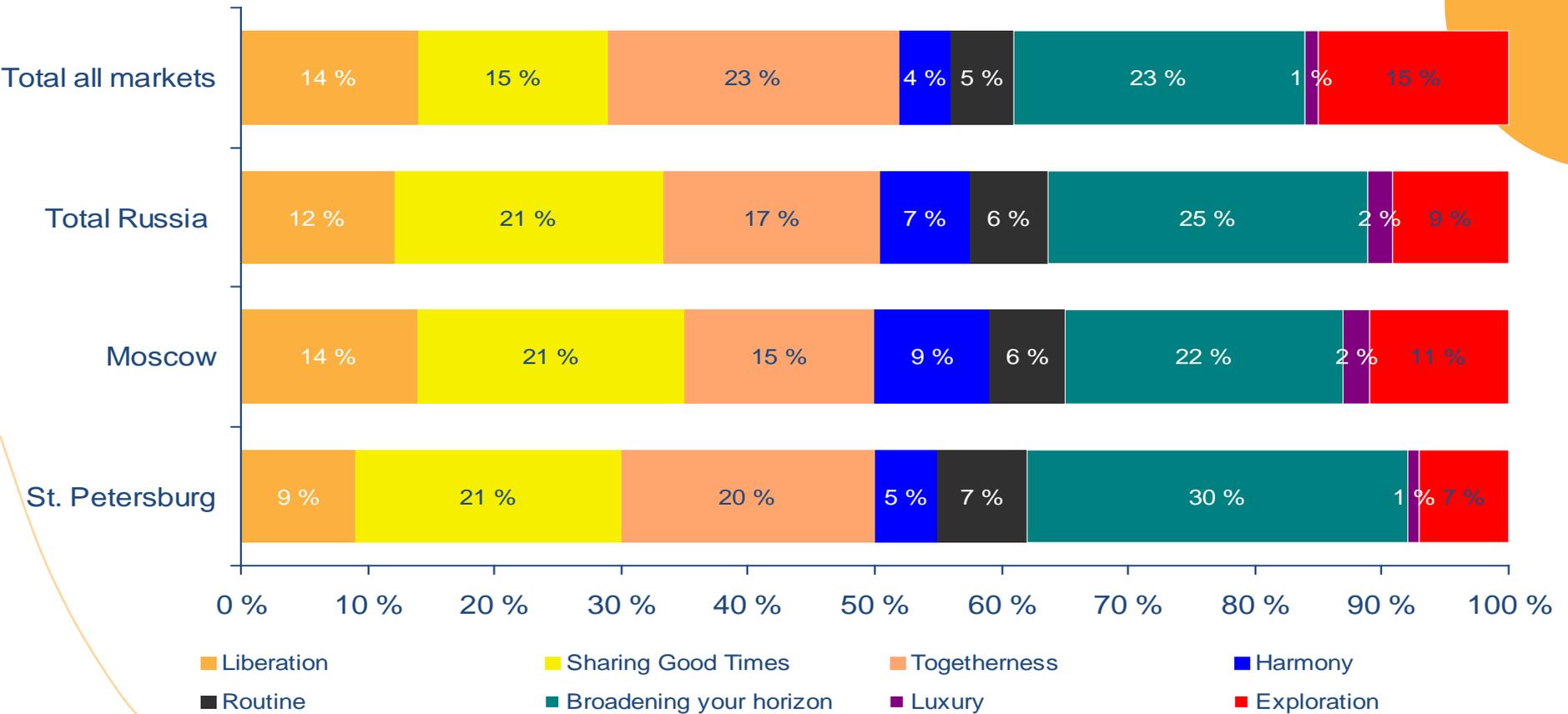


n = visits abroad



REGIONAL DIFFERENCES

Segment share - All destinations – all types of holiday



Summary of the segments

- Gives me rich experiences
- Discover new and interesting places
- Escape from my hectic daily life
- Enrich my view of the world

- Enjoy life to the fullest
- Feel full of energy
- Feel completely liberated
- Escape from my hectic daily life
- Come to my senses

The slide shows the five most important emotional benefits and personality factors in each segment

- Share good times
- Meet new people
- Immerse myself in the local culture
- Discover new and interesting places
- Escape from my hectic daily life



- Indulge in a bit of luxury
- Feel on top of the world
- Show my superior lifestyle
- Feel special
- Shows that I am successful in life

- Luxurious
- Classy
- Extravagant
- Superior
- Indulgent

- Predictable
- Practical
- Structured
- Relaxed
- Friendly

- Cultivated
- Contemporary
- Caring
- Friendly
- Relaxed

- Escape from my hectic daily life
- Precious moments of togetherness
- Intensify the relationship with my loved one(s)
- Share good times with others
- Spoil my loved ones

- Discover new and interesting places
- Broaden my horizon
- Broaden my knowledge
- Enrich my view of the world
- Rich experiences

- Avoid too many surprises
- Keep everything under control
- A safe feeling
- Escape from my hectic daily life
- Share good times

- Pamper myself
- Sense of being well cared for
- A safe feeling
- Let go without restrictions
- Escape from my hectic daily life

Summary of the segments

The slide shows the five most important destination features and activities in each segment

- Has beautiful nature
- Has interesting sights
- Has friendly people
- Allows me to have unique experiences
- Has nature that offers opportunities for discovery

- Observe beauty of nature
- Taste local food and drink
- Relaxation
- Discover local culture and lifestyle
- Visit restaurants

- Has beautiful nature
- Is easy to travel to
- Is safe
- Has friendly people
- Allows me to be physical active

Destination features

Activities

- Relaxation
- Observe beauty of nature
- Taste local food and drink
- Visit restaurants
- Attend sightseeing tours

- Taste local food and drink
- Visit restaurants
- Visit cities
- Relaxation
- Discover local culture and lifestyle

- Has friendly people
- Has interesting sights
- Has good local cuisine
- Is easy to travel to
- Has beautiful nature

- Has a variety of different restaurant offers
- Has beautiful nature
- Has good service
- Has interesting sights
- Has good shopping
- Has interesting culture and art

- Shopping
- Visit restaurants
- Taste local food and drink
- Relaxation
- Visit historical buildings/sites
- Get pampered

- Relaxation
- Observe beauty of nature
- Taste local food and drink
- Visit restaurants
- Hiking (less than two hours)

- Has friendly people
- Has beautiful nature
- Is safe
- Is easy to travel to
- Is easy to travel around

- Taste local food and drink
- Visit historical buildings/sites
- Visit cities
- Attend sightseeing tours
- Discover local culture and lifestyle

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

- Taste local food and drink
- Visit restaurants
- Relaxation
- Shopping
- Visit cities

- Has interesting sights
- Has interesting culture and art
- Has friendly people
- Has beautiful nature
- Has rich cultural heritage

- Is easy to travel to
- Is safe
- Has beautiful nature
- Is easy to travel around
- Has friendly people

- Is safe
- Has good service
- Has friendly people
- Has good local cuisine
- Is easy to travel to

4. Assessment of Norway



Assessment of Norway

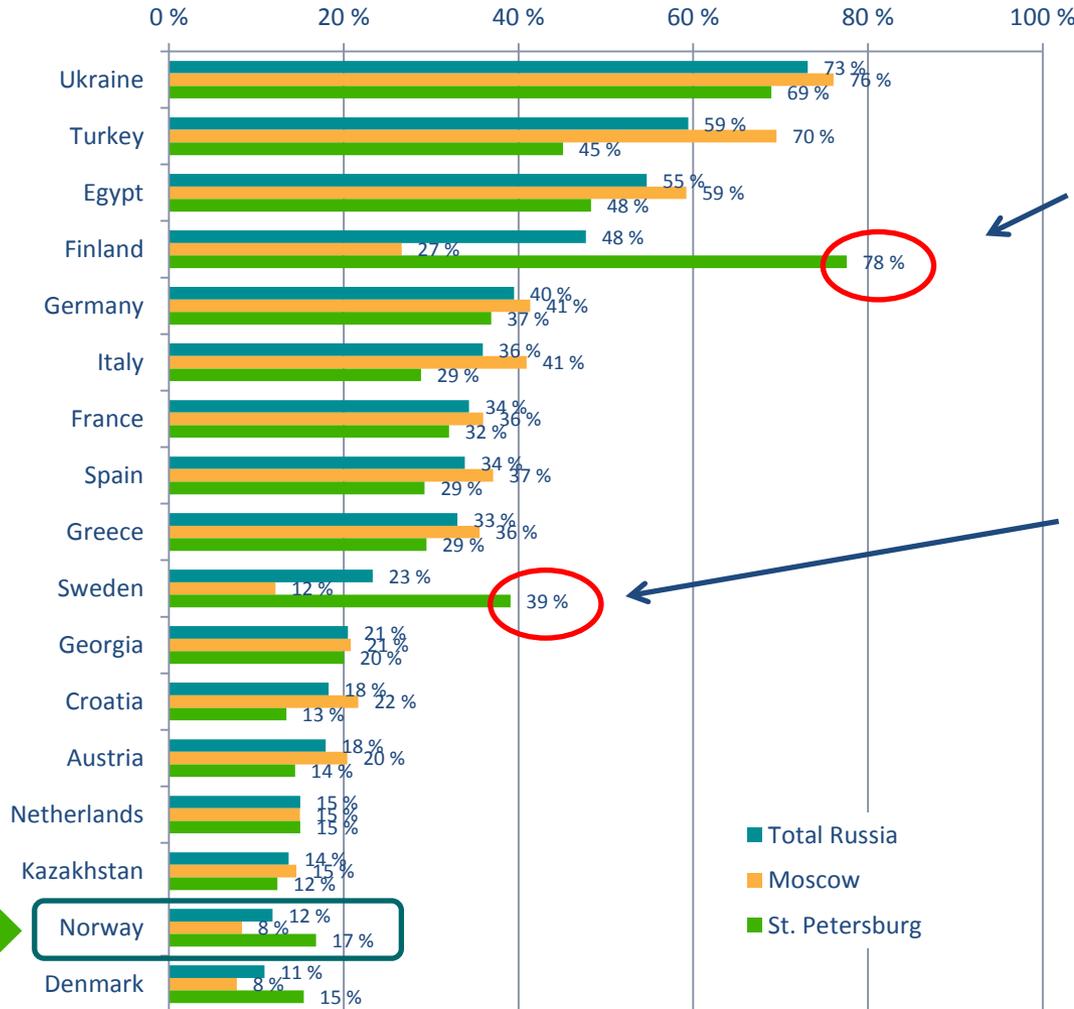


Where do Russians go?

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

12% of Russians have ever visited Norway, which is lower than Sweden and Finland.

Penetration = ever visited



The Finnish penetration is extremely high in St. Petersburg. As a matter of fact; Finland is #1 destination in St. Petersburg.

Sweden has also a stronghold in St. Petersburg.

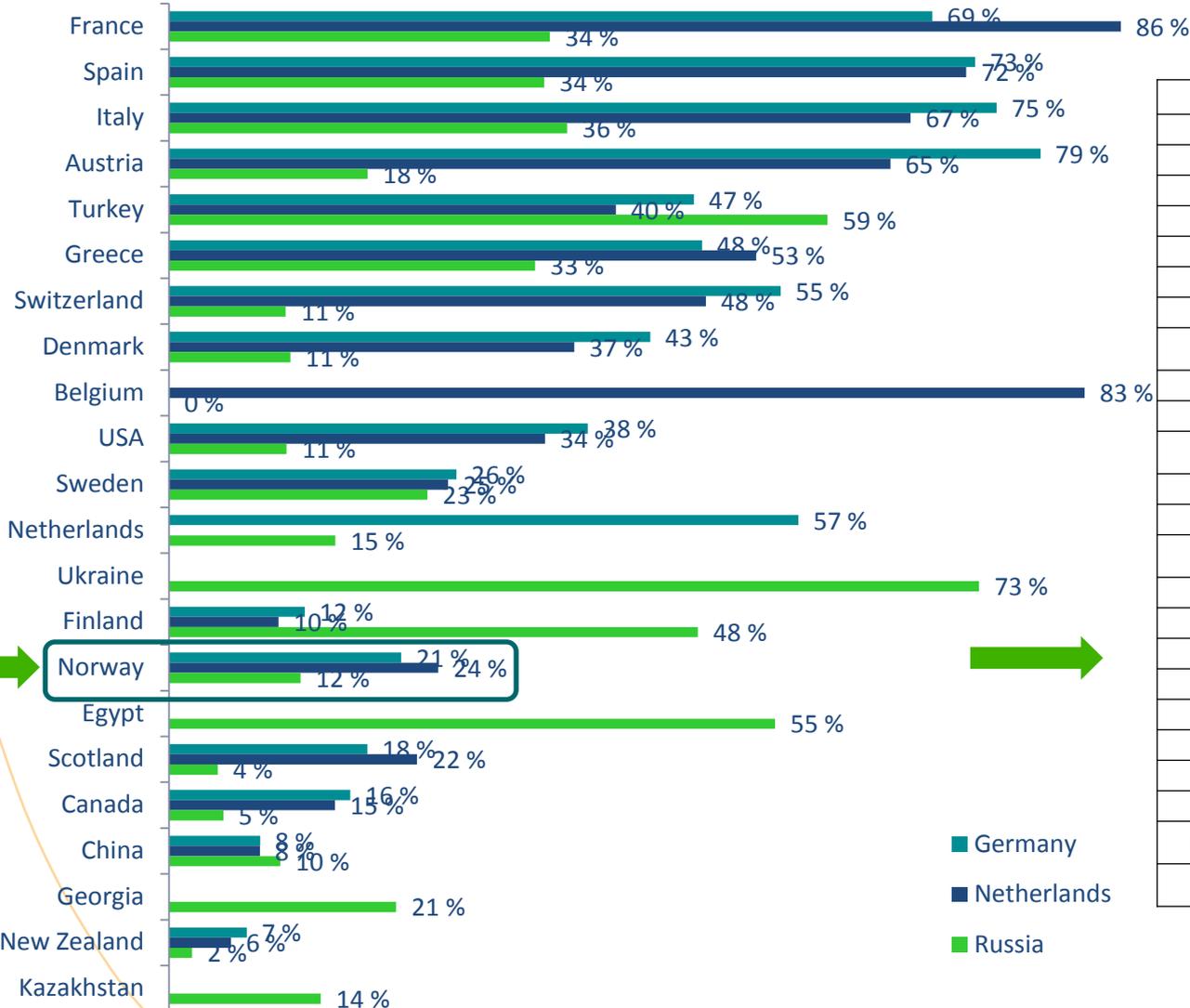
Norway also holds it's strongest position in St. Petersburg



Norway as a tourist destination – Across the three countries

Norway has a higher penetration as a travel destination in The Netherlands and in Germany than in Russia. Repeat visiting is also lower in Russia.

Penetration = ever visited



Repeat visits (twice or more...)

	Total	Germany	Netherlands	Russia
France	71%	63%	85%	37%
Spain	71%	82%	73%	37%
Italy	64%	75%	65%	34%
Austria	70%	78%	69%	27%
Turkey	56%	62%	48%	59%
Greece	51%	54%	56%	32%
Germany			82%	47%
Switzerland	52%	50%	56%	28%
Denmark	44%	50%	40%	28%
Belgium			81%	
USA	53%	54%	51%	48%
Croatia	36%	47%	31%	20%
Sweden	37%	38%	37%	36%
Netherlands		58%		35%
Ukraine				87%
Finland	53%	30%	19%	70%
Norway	35%	33%	38%	25%
Egypt				59%
Scotland	34%	35%	32%	37%
Canada	34%	30%	36%	35%
China	34%	39%	30%	33%
Georgia				48%
New Zealand	31%	35%	22%	46%
Kazakhstan				43%

Average across all holidays in the three countries: **53%**

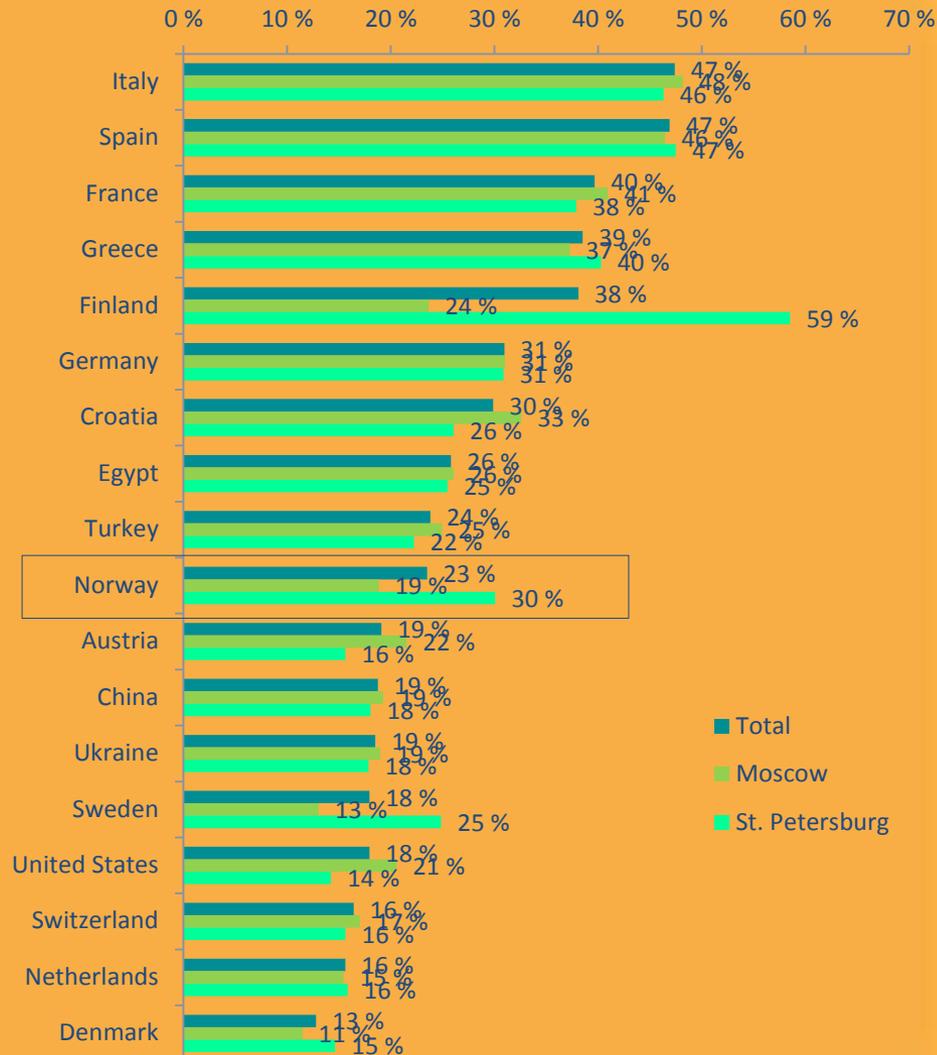
Regional differences in repeat visitors

	Repeat visitors = 2 times or more		
	Total Russia	Moscow	St. Petersburg
Ukraine	87 %	88 %	86 %
Finland	70 %	30 %	89 %
Turkey	59 %	63 %	52 %
Egypt	59 %	66 %	48 %
United States	48 %	46 %	52 %
Georgia	48 %	49 %	46 %
Germany	47 %	45 %	50 %
New Zealand	46 %	64 %	0 %
Kazakhstan	43 %	38 %	52 %
France	37 %	37 %	38 %
Scotland	37 %	40 %	32 %
Spain	37 %	42 %	27 %
Sweden	36 %	26 %	40 %
Canada	35 %	41 %	24 %
Netherlands	35 %	37 %	32 %
Italy	34 %	37 %	29 %
China	33 %	30 %	39 %
Greece	32 %	32 %	33 %
Switzerland	28 %	29 %	26 %
Denmark	28 %	30 %	27 %
Austria	27 %	26 %	29 %
Norway	25 %	20 %	29 %
Croatia	20 %	24 %	10 %

The repeat rates proves Finland's dominant position in St. Petersburg.

Norway is on the Russian consideration list

CONSIDERED DESTINATIONS

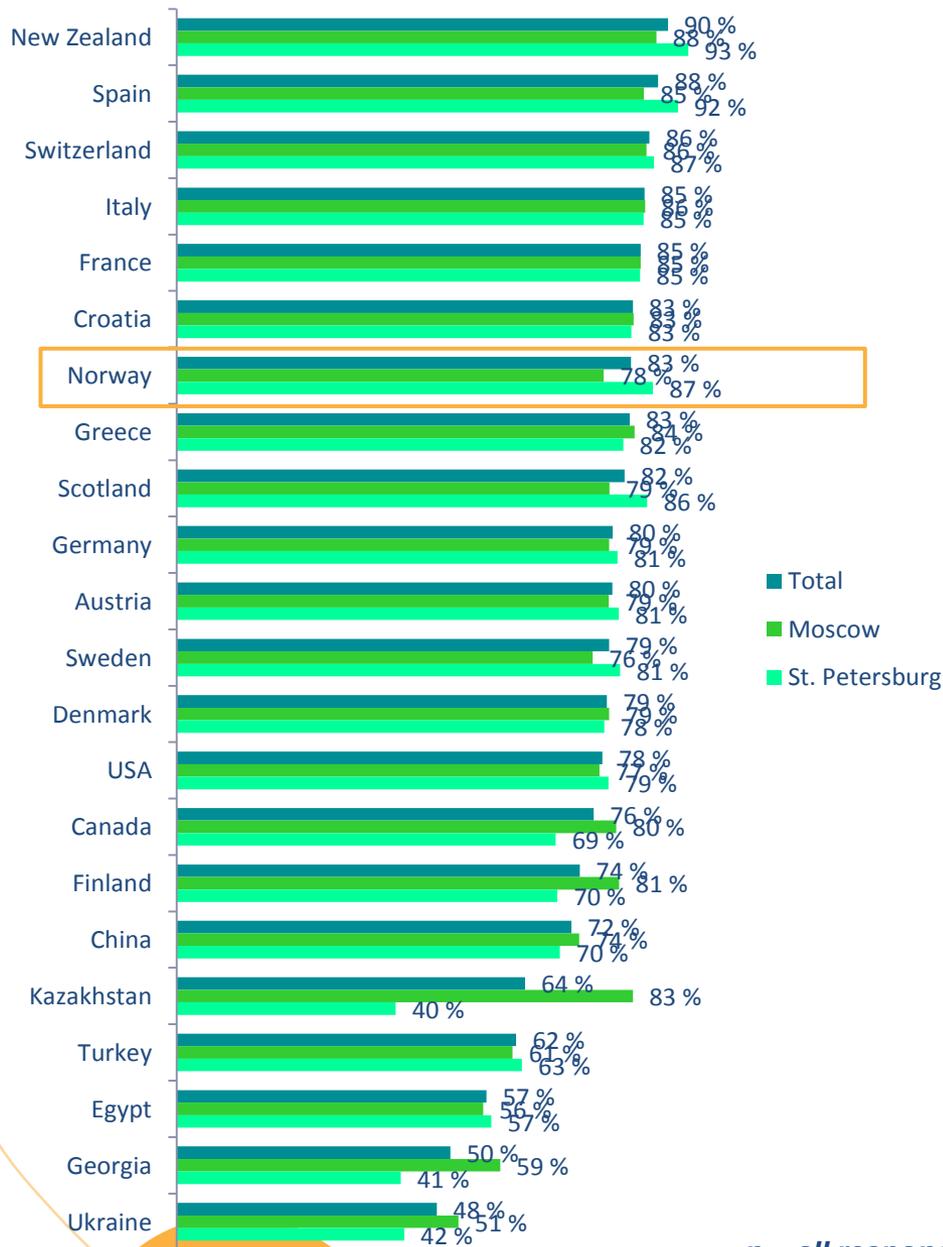


A lot of unlocked potential: 10th on the considered list, 16th on the actually visited list

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

n = all respondents aware of the country

Norway is the best rated Scandinavian destination in Russia

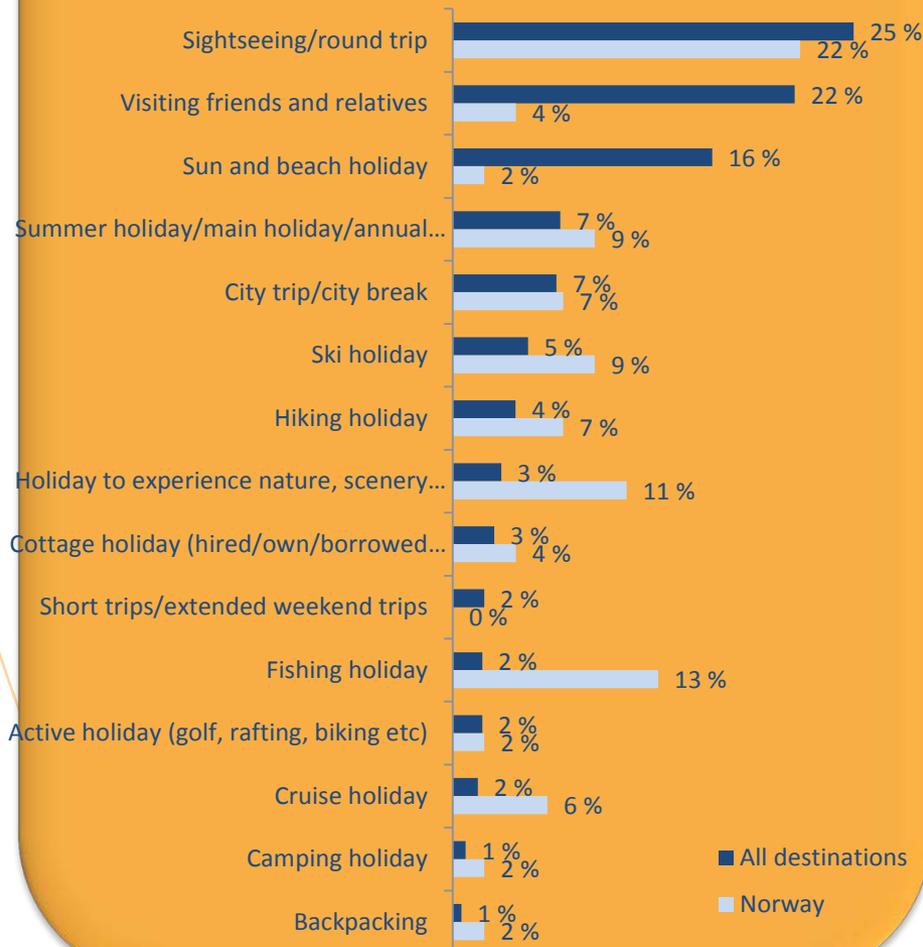


Using the scale below, please rate your overall opinion of each country as a holiday destination.

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

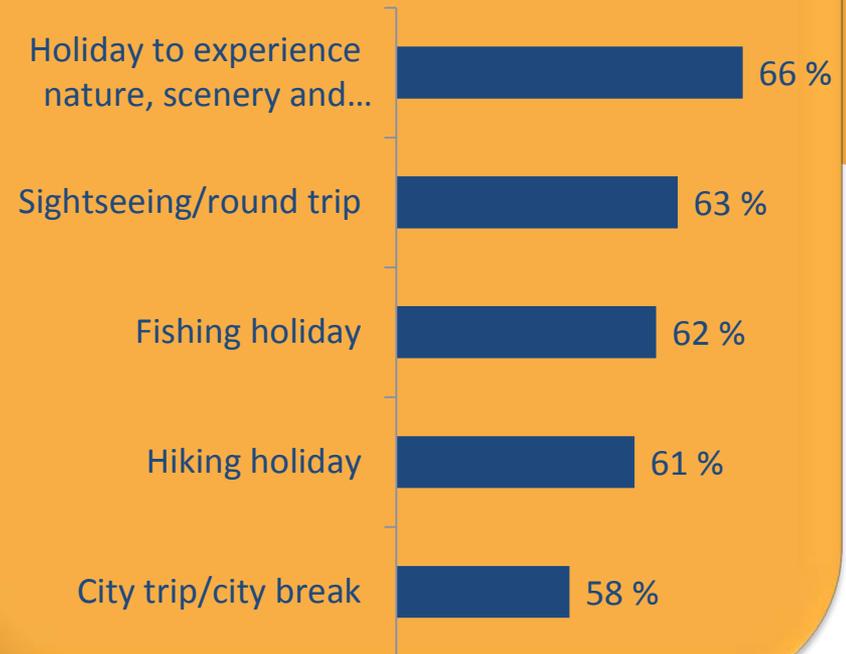
BEHAVIOUR

TYPE OF HOLIDAY RUSSIAN TOURISTS TRAVEL ON



PERCEPTION

TYPE OF HOLIDAY SUITABILITY OF NORWAY AS A DESTINATION



Norway is mostly associated with holidays to experience nature. In terms of actual behavior sightseeing/roundtrip is the most important holiday type. Norway does not have such a strong association with ski.

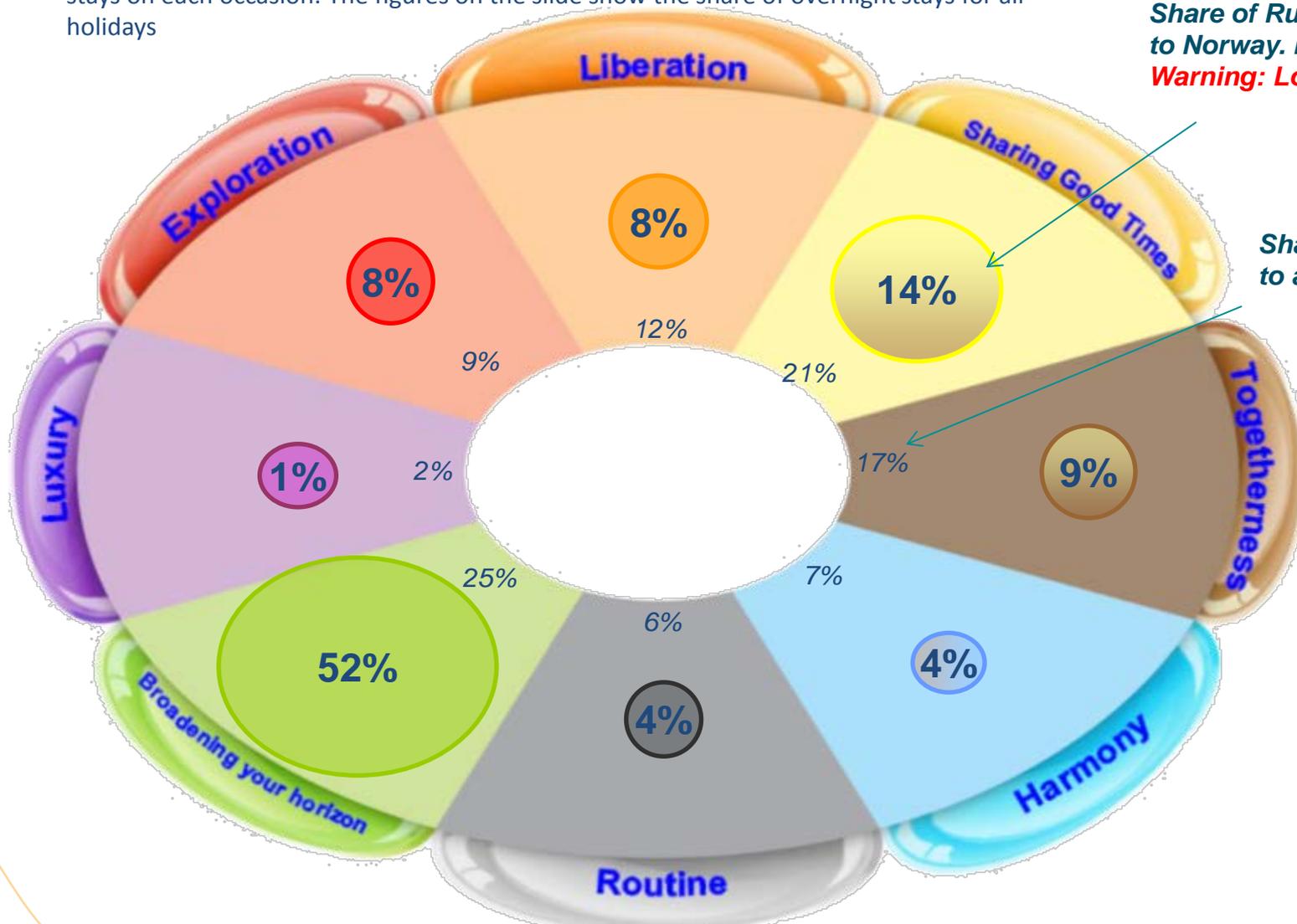
Russian holidays to Norway + all holidays to any destination from Russia

The size* of each segment

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

Share of Russian holidays to Norway. N = 54
Warning: Low sample size

Share of all holidays to any destination



Source: Russian holidays to Norway. N = 54 Warning: Low sample size!

Source: All holidays to any destination in the quantitative sample

SUMMARY OF SCORECARD FOR NORWAY: Russians perception of Norway as a holiday destination

DESTINATION FEATURES

- Has beautiful nature
 - Is not too warm
- Has environmentally friendly offers
 - Has unspoiled nature
 - Has quiet environments

ACTIVITIES

- Observe the beauty of nature
- Discover local culture and lifestyle
- Discover local history and legends
 - Experience wildlife
- Attend sightseeing tours

WHAT

are Norway perceived as?

EMOTIONAL BENEFITS

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

PERSONALITY

- Fresh
- Cultivated
- Explorative
- Peaceful
- Harmonious

Scorecard Norway, actual figures: Russians perception of Norway as a holiday destination

Items on the list = many respondents have ticked this = core of the subject at hand

Items that appear in bold = over index
= is unique to the subject, i.e. differs from other subjects.
I.e. if Norway has a high index on an item, this item makes Norway different from other destinations.

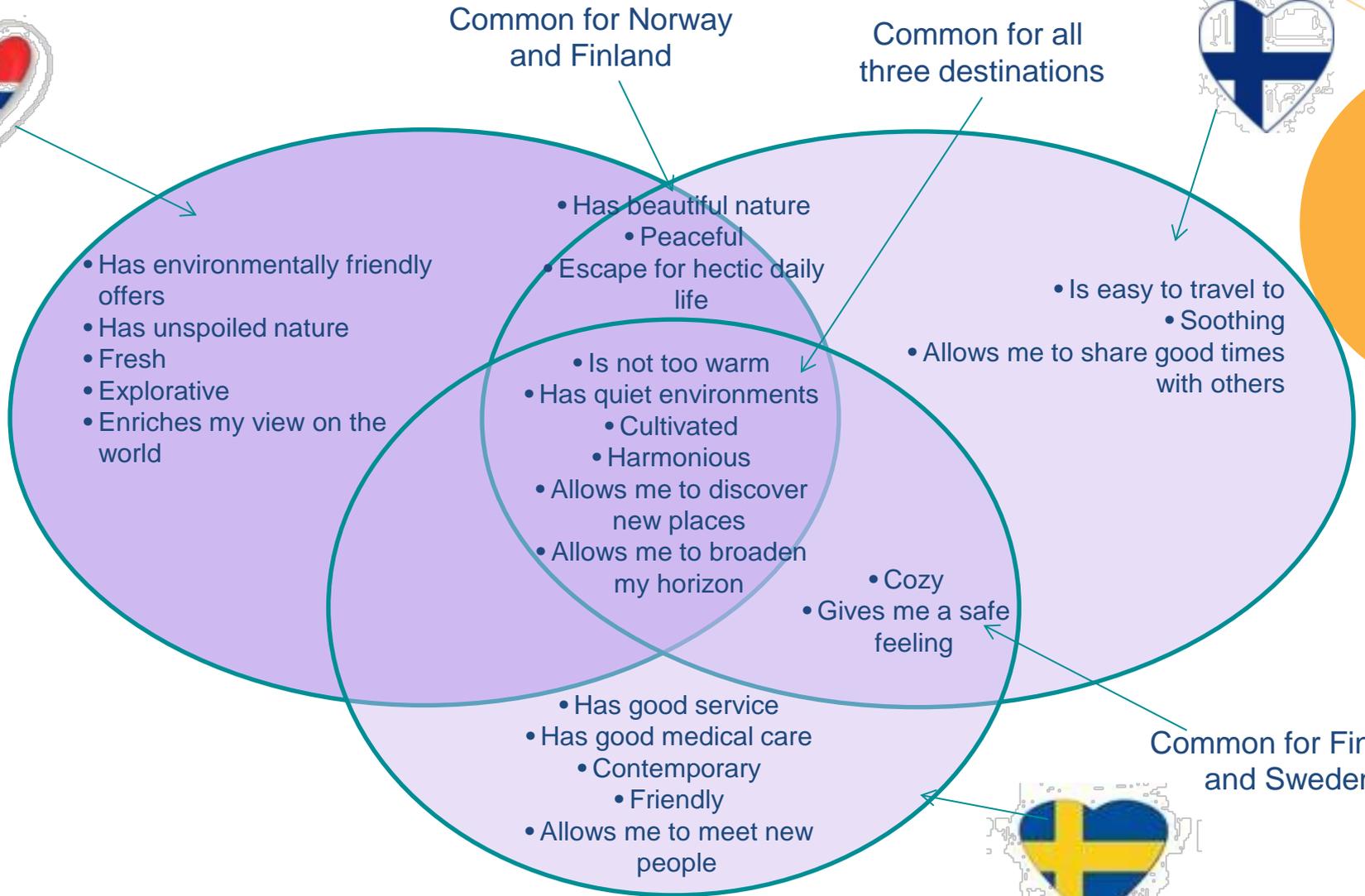
Emotional benefits (n=1131)	%	Index
Allows me to discover new and interesting places	77,4	113
Allows me to broaden my horizon	73,0	103
Enriches my view on the world	71,0	109
Helps me to escape from my hectic daily life	66,6	126
Allows me to broaden my knowledge	66,2	100

Destination features (n=1131)	%	Index
Has beautiful nature	84,5	124
Is not too warm	82,8	186
Has environmentally friendly offers	75,1	170
Has unspoiled nature	72,4	209
Has quiet environments	72,2	146

Personality (n=1131)	%	Index
Fresh	59,6	169
Cultivated	58,4	127
Explorative	56,4	137
Peaceful	54,8	138
Harmonious	54,6	120

Activity (n=1131)	%	Index
Observe beauty of nature	80,5	124
Discover local culture and lifestyle	71,4	105
Discover local history and legends	69,9	103
Experience wildlife	69,8	167
Attend sightseeing tours	69,3	92

Comparison between Norway, Finland and Sweden



Summery competitor analysis

- Positive and distinguishing features for Norway
 - ⇒ Beautiful nature
 - ⇒ More adventurous
 - ⇒ More of an experience

- Negative and distinguishing features for Norway
 - ⇒ Less social
 - ⇒ Less comfortable



Norway is perceived as rich in nature, with high-living standards, but rather detached, reserved, cold and implying a sense of challenge to get to it's beauty and soul

- Associations: The key association all relate to nature, not to any art or culture sightseeing:
 - ⇒ Purity of nature – fiords, relict forests, cold and pure see, lakes
 - ⇒ Hard to reach nature beauty
 - ⇒ Cold and rainy climate
- Also connected with:
 - ⇒ Fish and fishing
 - ⇒ Winter-sports, like skis
 - ⇒ Trolls and folk legends, Vikings:
 - ⇒ «I was reading Norwegian tales when a school-boy and I liked these tale of trolleys so much. They are very reserved people, there are very few immigrants there this is way they managed to keep the genuine, old country spirit. And the country spirit is what I look for in a trip. For me this country is rather exotic (Male, 25-40)»
- Norway is associated with expensiveness of life and holiday-spending:
 - ⇒ “Very high prices, not that affordable. You just understand this cannot be cheap in any way” (Male, 25-40)
- Not associated with
 - ⇒ high-class comfort hotels with spa procedures
 - ⇒ associated with family stay – audience is not aware it can be comfortable enough and interesting for kids



- Brand image:
 - ⇒ Identity: Well-developed, socially secure and protected with high living standards Northern country not that opened to the world, keeping it's traditions
 - ⇒ Personality: reserved, calm, steady, strong, independent, genuine, charismatic, powerful, self-confident. Sort of restrained and detached
- Culture – high living standards and social securities.
- However not associated with art or architecture masterpieces:
 - ⇒ “I think there are no museums there at all” (Male, 55-65)
 - ⇒ “There is no Jazz music there” (Feale, 55-65)
- No profound knowledge of culture, only a few celebrities mentioned: Edward Grieg, Leifur Eriksson (mentioned by older audience)
- Polarising opinions on national character traits:
 - ⇒ Part of audience consider Norwegians as very reserved, cold and non-emotional
 - ⇒ Others assume – they are open-hearted and hospitable





- **Holiday knowledge:**
 - ⇒ General knowledge – quite limited, very generic. Iconic sights known – North Cape, aurora. Younger audience also mentions ancient railway
 - ⇒ What to do: visit fiords, go through the country by car or railroad, rafting, mountain skis, fishing, bicycling, eco-tourism, rent a cottage in wild nature
 - ⇒ When to go: Mostly in summer and for a rather prolonged stay (around two weeks):
 - “There is no sense to go there for less than 2 weeks. I’d like to see how people live their in rural areas, what do they do in Norway in our century, what kind of manufacturers they have” (Male 55-65)
- **Holiday values:**
 - ⇒ Currently more associated with calm, steady, meditating type of stay, solitude, total relaxation and escaping into piece of mind and sole
 - ⇒ However also can be mind-refreshing and purifying, invigorating, re-energizing and inspiring as giving really unique and bright impressions of nature sights
- **General holiday interest: polarizing, very aspirational for part of audience, completely not attractive for others**
- **Who is this destination for: Core target for Norway – rather experienced, advanced and independent travellers, nature and sport/ active holiday lovers**
 - Link to motivational strategies – mostly fit to active explorers and authenticity seekers. Potential fit to harmony seekers
 - Link to recruitment – more relevant for 25-40 Male audience

The role of nature and nature elements in Norway



- Nature creates a core in Norway perception and identity for Russians
 - ⇒ audience values it's richness, authenticity and well-preserved purity and Northern kind of beauty
 - ⇒ Norwegian nature is more associated with strict beauty and elegant of flora – mountains, lakes, fascinating views and fauna – mostly sea one.
 - ⇒ But not connected either to versatility of nature – bright colours, lots of species or to nature created/fine-tuned by people – city parks, zoos, park + architecture etc.
- However for majority Russians nature as such is not often enough to attract and make a visit to the country, especially if this is not that affordable:
 - ⇒ Russia is very rich and versatile in terms of nature and nature sights though highly valued by Russians as such do not create enough fascination
- Norway in Russian eyes is all about nature and experiences they expect to find there is mostly connected with it:
 - ⇒ On the one hand it creates as aspiration as Norway is associated with fascinated views, unusual colours
 - thus with calm, steady, harmonious state of mind and shifting the mood from hectic
 - city-life
 - ⇒ On the other hand – it's also associated with necessity to take physical efforts – it's more about a rest for your soul and mind, but not for your body
- Moreover Norwegian nature is perceived as rather tough in terms of climate conditions and accessibility of major sights

The role of nature and nature elements in Norway

Key learning

- Norway nature is the core aspiration for country visit
- However, due to it's Northern and wild tonality, Russians feel it to be demanding in terms of physical efforts
- It is rather connected with a sense of body refreshment and adrenalin and not inviting for comfort and self-indulgent rest lovers
- It can provide total relax for your mind and soul, but not that relaxing for the body

Triggers

- Unique, non mass-touristic experience
- Dive into genuine nature in a country with high living standards and comforts
- Sense totally different environment – northern, reserved, strong and powerful
- Eco-purity
- Fascinating nature views
- Contrasts – hot and cold, bright and pastel, tough and comfort in one place at a time
- Visit as a part of Scandinavian tour, together with Sweden and Finland

Barriers

- Lack of knowledge and information presented in a transparent and easy to get way
- Expensiveness and high prices
- Cold, non steady weather
- Not enough comforts for kids
- Limited range of propositions freely found in the Internet
- Not an active advertising policy and presence on travel sights

What does new information about Norway do to people's perception

- The new information shows has not made a dramatic change in consumer mind in terms of perceptions
- However it enhances the country image in the following ways:
 - ⇒ Makes it feel more comfortable and convenient to visit
 - ⇒ Gives idea of nature versatility – not only cold, but also some rather warm region where you can wear short sleeves and even bathe:
 - especially important for harmony seekers, who can be also attracted, but currently consider Norway as not that inviting and pampering
 - ⇒ Highlights variety of convenience of opportunities for active rest/sports
 - especially important for active explorers
 - ⇒ Aspires by showing unique and fascinating nature sights
 - However for older public they seem rather hard to reach

Key learning

Although new information somewhat enhances Norway image in terms of higher comfort level and versatility it still lacks "human and culture" touch and role to be truly aspirational for Russians

5a. Key Conclusions and Recommendations - Across all three markets



RECAP GLOBAL CONCLUSIONS

Despite a slightly differentiated position compared to competing destinations, Norway is not relevant enough to attract a lot of (repeat) visitors

- Norway fails to attract a lot of visitors
 - ⇒ The share of people that have ever visited Norway is low compared to other destinations.
 - ⇒ Repeat visiting is also lower than average.
- Norway has a fragmented brand footprint and does not clearly 'own' any motivational segment.
- However, the current Visit Norway Strategy is broadly on target:
 - ⇒ Across all markets, Norway is often associated with Exploration and Broadening your Horizon.
 - ⇒ But the strength of this association is relatively weak.

If Norway wants to attract more visitors, it will have to increase its relevance as a holiday destination

Norway needs to broaden its appeal by increasing its relevance as a holiday destination

1.

Norway needs to strengthen its association with Exploration (with an element of Broadening your Horizon)

Managing Perception (communication)

2.

At the same time, the total range of products available must go beyond just that. By using specific products, Norway can also be relevant for Togetherness and Liberation

Managing Behaviour (product offer)



Exploration



Broadening your Horizon



Liberation



Togetherness

Key Conclusions and Recommendations - Across all three markets

How to strengthen the association with Exploration

1.

Norway needs to strengthen its association with Exploration

Managing
Perception
(communication)

Why?

- In all markets, Norway is mostly associated with Exploration (together with Broadening your Horizon).
- There is also a lot of potential to exploit these segments in terms of behaviour.
- Exploration can tolerate higher prices relatively well; there is some perceived value in having rich experiences.

How to strengthen the association with Exploration

1.

Norway needs to strengthen its association with Exploration

Managing
Perception
(communication)

How?

- Exploration and Broadening your Horizon are about active participation; about having rich, unique experiences.
- Although Norway is successfully associated with the beauty of nature, the focus is too much on observing, the association is too passive, not active enough.
- How can Norway strengthen its association with nature?
 - Nature is not the central focus, it is more of an enabler for active participation, for empowerment.
 - Experiencing nature in Norway should be associated with an empowering, life-changing experience.
 - Avoid showing too much 'postcard nature'; rather show how people are actively participating in nature.

How to strengthen the association with Exploration

FROM ...

Passive enjoyment



Postcard beauty of nature



TO ...

Active participation



Participating in the beauty of nature



How to strengthen the association with Exploration

FROM ...

A lonely experience



TO ...

An experience with family/friends



How to strengthen the association with Exploration

FROM ...

An expensive experience



TO ...

A priceless experience



On a product level, we might have to address other segments as well

2.

At the same time, the total range of products available must go beyond just that. By using specific products, Norway can be relevant for Exploration as well as for Broadening your Horizon, Togetherness and Liberation

Managing
behaviour (product
offer)

Why?

- From a branding point of view, it makes a lot of sense to focus on Exploration alone.
- Because Exploration is only a small part of why people go on holiday, Norway also has to address other segments to achieve sufficient volume and to have relevance in all key product groups.
- Next to Exploration, Broadening your Horizon, Togetherness and Liberation are the most important segments.
- Certainly when we look at specific markets, Exploration alone does not offer sufficient volume potential (e.g. Russia).

On a product level, we might have to address other segments as well

2.

At the same time, the total range of products available must go beyond just that. By using specific products, Norway can be relevant for Exploration as well as for Broadening your Horizon, Togetherness and Liberation

Managing
behaviour (product
offer)

How?

- For each of these segments, Norway has something important to offer, something it can build on.
 - **Exploration:** engaging with nature, offers rich experiences
 - **Broadening your Horizon:** unique history, unique sites, authentic cities, culture...
 - **Togetherness:** a peaceful place where people can come to their senses
 - **Liberation:** a place that allows you to completely escape from your hectic daily life, where you can feel completely free and liberated
- Addressing these motivations through specific holiday types/products (e.g. Skiing, Sightseeing, Cruise, etc.) will be key to unlocking their potential.

5b. Key Conclusions and Recommendations - Russia



MEET GENERIC HOLIDAY EXPECTATIONS

Innovation Norway should address the basic expectations that Russian have when going on holiday, including basic comfort, a more social experience and more cultural content.



A comfortable experience

- Ease travel experience
 - Easy of booking
- Take away fears of being a bit lost, left on their own



A social experience

- Communicate lively towns & villages
- 'Populate' the isolated scenes
- Tackle language barrier by group travel



Good food & drinks

- Talk about local food & drink traditions
- But also talk about good international cuisine (for the less adventurous)
- Communicate tax free on arrival

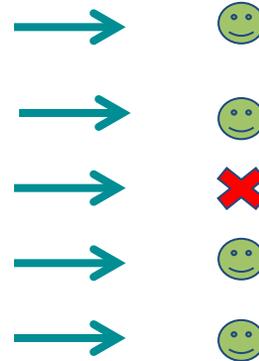
Reach minimum level of generic expectations

What Russian tourists want in general:

Allows me to discover new and interesting places
Allows me to broaden my horizon
Helps me live life to the fullest
Enriches my view of the world
Helps me to escape from my hectic daily life

Emotional Benefits (for the tourist)

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



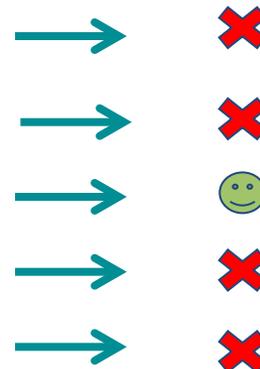
Norway delivers well

Norway does not deliver very well

Norway delivers pretty well on the emotional level...

Personality (for Norway)

Friendly
Cozy
Harmonious
Outgoing
Authentic



...but not on personality

Reach minimum level of generic expectations

What Russian tourists want in general:

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

Product characteristics (for Norway)

Has friendly people
Has beautiful nature
Has interesting sights
Is safe
Has good service

→	✗
→	😊
→	✗
→	✗
→	✗

Norway does not deliver very well

Norway delivers well

Activities (in Norway)

Taste local food and drink
Attend sightseeing tours
Observe the beauty of nature
Visit historical buildings/sites
Discover local history and legends

→	✗
→	😊
→	😊
→	✗
→	✗

Norway does not deliver optimally on the functional level

TARGET EXPLORATION & BROADENING YOUR HORIZON DURING SIGHTSEEING/ROUNDRIPS

Where the global strategy has a more narrow focus on Exploration, in Russia Innovation Norway should address both Exploration & Broadening your Horizon. Sightseeing/roundtrips are the key

- Exploration alone only covers 9% of the abroad (vs 16% /18% in Germany & The Netherlands)
- Broadening your Knowledge is part of the generic expectations that Russians have when going on holiday
- Sightseeing/roundtrips cover 25% of all travel abroad by Russians and are currently already the most important reasons why they visit Norway today.
- In addition to that there is also more niche opportunity for Norway as a destination for fishing, to experience wildlife, etc.

INCREASE CULTURE HERITAGE IN COMMUNICATION

Russians want to learn when they are on holiday. Norway has a lot of cultural heritage which too often remain hidden gems for future tourists. Next to a nature experience Norway should emphasize it's heritage.

Historic cities



Arts, museums

MUNCH
museet



Local myths



Local tradition



History



Local music scene



SIMPLIFY TRAVEL PLANNING

Certainly with sightseeing/roundtrips being the most important holiday types.

FROM



Long distance trips with a lot of repetition

TO

Concise trips taking 7-10 days where you see all the variety Norway has to offer

LASTING MEMORIES

Actively work on giving people memorable experiences. Don't underestimate the power of simplicity (e.g. feeding the birds on the boat, eating fresh shrimp, etc.)

- Examples:
 - The nature, the force of it, the sea, the fjords, the Viking heritage, beggars in the streets in the richest country in the world
 - The Fjord ferry trip in Oslo with fresh shrimps and white wine.
 - Feeding the seagulls on the ferry in the Nærøy fjord





Appendix

- A) Segment score cards
- B) Competing destinations – common ground analysis
- C) Overall positioning & targeting – holiday types

A) Segment score cards

Liberation

Description

LIBERATION

- Active and fresh



Segment
size 12%

Segment core:

- The basic motivation for going on holidays is to live life to the fullest. Makes me feel full of energy and completely liberated.
- It is active and fresh.

Most important differentiators:

• Personality:

- Active
- Fresh
- Friendly
- Outgoing
- Cozy

• Emotional benefits:

- Helps me to enjoy life to the fullest
- Makes me feel completely liberated
- Allows me to come to my senses
- Makes me feel full of energy

• Destination characteristics:

- Has beautiful nature
- Has friendly people
- Is safe
- Has guaranteed sunshine

• Activities:

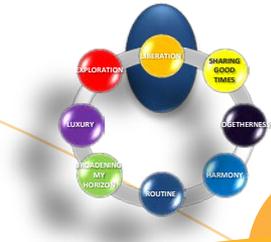
- Observe beauty of nature
- Taste local food and drink
- Attend sightseeing tours
- Get pampered
- Discover local history and legends

• Type of holiday:

- Sightseeing/round trip
- Visiting friends and relatives
- Sun and beach holiday
- Ski holiday

LIBERATION

- Active and fresh



Who:

- A female dominance (58%), 30-39 years (34%) is the most dominant age group. The age group 30-49 years constitutes 53% of the sample. Important segment also for the 18-24 years age group (23%)
- They travel with their spouse/partner (51%), friends (28%), kids under 14 years (27%) and/or other relatives (18%)
- Educational level: Higher education (75%) or Incomplete higher (13%).
- Marital status: Married with children (51%), Single without children (17%) or Married/partner without children (23%).

How do they travel:

- Transport to destination dominated by car(31%) and scheduled flights (30%)
- Transport during stay dominated by own car (40%) and rented car (30%)
- Most common accommodation:
 - Hotel medium standard (31%)
 - Rented or borrowed cabin / holiday home / flat (18%)
- 55% of them organised the trip themselves and travelled independently, 24% travelled in a group with an organized tour and 19% had the trip organized by others and travelled independently
- Their choice of holiday/destination is influenced by nobody but themselves (33%), their partner (31%) or their friends (34%)

• Information sources:

- Internet in general (70%)
- Websites about destination (39%)
- Advice from friends (33%)
- Hotel/accommodation websites (33%)

• Planning horizon:

- 17% decided on the holiday 1-3 weeks before departure
- 15% decided on the holiday up to 1 month before departure
- 18% decided on the holiday up to 2 months before departure
- 15% decided on the holiday up to 3 months before departure
- 18% decided on the holiday 4-6 months before departure

Sharing Good Times

Description

Sharing Good Times

- Sociable, outgoing and friendly



Segment
size 21%

Segment core:

- The basic motivation for going on holidays is to be sociable, to share good times with others, to socialise, be open-minded and meet new people. There is also an element of liberation.
- Holidays abroad enhance this feeling of warm-heartedness, friendliness and of embracing the mentality of the locals (often associated with sunny Southern countries), making holidays a cheerful and convivial time.
- Enjoying a lively and cheerful time, having contact with locals, making new acquaintances and immersing oneself in the local culture.

Most important differentiators:

- Personality:
 - Outgoing
 - Sociable
 - Friendly
 - Cozy
 - Cultivated
- Emotional benefits:
 - Allows me to share good times with others
 - Helps me to meet new people
 - Allows me to immerse myself in the local life
- Destination characteristics:
 - Has friendly people
 - Has good local cuisine
 - Is easy to travel to
 - Offers a wide range of possible activities
 - Has interesting sights

• Activities:

- Attend sightseeing tours
- Taste local food and drink
- Visit historical buildings/sites
- Observe beauty of nature
- Visit cities

• Type of holiday:

- Visiting friends and relatives
- Sightseeing/round trip
- Sun and beach holiday

Sharing Good Times

- Sociable, outgoing and friendly



Who:

- A marginal female dominance (54%), 30-39 years is the most dominant age group (35%), 30-49 constitutes 55% of the sample.
- They travel with their spouse/partner (45%) and/or friends (27%).
- Educational level: Higher education (72%).
- Marital status: Married with children (32%), Single without children (23%), Partner without children (16%), Married without children (16%).

How do they travel:

- Transport to destination is dominated by scheduled flight (32%), car (28%) and charter plane (25%)
- Transport during stay dominated by bus (51%) or rented car (22%)
- Most common accommodation:
 - Hotel medium standard (28%)
 - Friends (19%)
 - Family (17%)
- 58% of them organised the trip themselves and travelled independently and 25% travelled in a group with an organized tour
- Their choice of holiday/destination is influenced by their partner (30%), no one except themselves (29%) or their friends (30%)

• Information sources:

- Internet in general (67%)
- Advice from friends/family (40%)
- Websites about destination (36%)
- Hotel/accommodation websites (27%)

• Planning horizon:

- 19% decided on the holiday 1-3 weeks before departure
- 19% decided on the holiday up to 1 month before departure
- 21% decided on the holiday up to 2 months before departure
- 12% decided on the holiday up to 3 months before departure
- 18% decided on the holiday 4-6 months before departure

Togetherness

Description

TOGETHERNESS

- Peaceful, soothing, cozy, friendly and relaxed



Segment
size 17%

Segment core:

- Holidays are a means of intensifying or cultivating relationships with others, especially family or extended family. They are about reinforcing emotional bonds with loved ones.
- Holidays abroad provide a nice framework for experiencing special moments together. People within this segment basically look for a time/place that allows them to share activities together and it is therefore important that the destination provides a varied range of different activities (for different age groups) so that everyone is happy and feels included.
- It is important to be able to spoil our loved ones.
- It is also important that they can experience a homey feeling, that they can move around freely, without feeling restricted, e.g. by rules of conduct.

Most important differentiators:

- Personality:
 - Peaceful
 - Soothing
 - Cozy
 - Friendly
 - Relaxed
- Emotional benefits:
 - Helps me escape from my daily life
 - Creates precious moments of togetherness
 - Allows me to intensify the relationships with my loved one(s)
 - Restores my sense of harmony and balance
- Destination characteristics:
 - Has beautiful nature
 - Has quiet environments
 - Is safe
 - Has friendly people

• Activities:

- Relaxation
- Observe the beauty of nature
- Taste local food and drink
- Hiking (less than two hours)
- Sunbathing and swimming

• Type of holiday:

- Visiting friends and relatives
- Sun and beach holiday
- Sightseeing/round trip

TOGETHERNESS

- Peaceful, soothing, cozy, friendly and relaxed



Who:

- A marginal female dominance (55%), 30-39 years is the most dominant age group (34%). The age group 25-49 years constitutes 76% of the sample
- They travel with their spouse/partner (59%) and/or children under 14 years (29%).
- Educational level: Higher education (73%)
- Marital status: Married with children (49%), Single without children (13%), Married/partner without children (22%)

How do they travel:

- Transport to destination dominated by car (28%) and scheduled flight (28%)
- Transport during stay dominated by bus (46%) own car (20%) or rented car (18%)
- Most common accommodation:
 - Hotel medium standard (31%)
 - With family/friends (28%)
 - Hotel high standard (19%)
- 55% of them organized the trip themselves and travelled independently, 23% had the trip organized by others and travelled independently, while 22% travelled in a group with a organized tour
- Their choice of holiday/destination is influenced by their partner (59%), children under 14 years (29%), their family (15%) or their friends (15%)

• Information sources:

- Internet in general (71%)
- Websites about destination (36%)
- Reviews from other travelers online (34%)
- Advice from friends/family (31%)
- Hotel/accommodation websites (31%)

• Planning horizon:

- 14% decided on the holiday 1-3 weeks before departure
- 15% decided on the holiday up to 1 month before departure
- 20% decided on the holiday up to 2 months before departure
- 16% decided on the holiday up to 3 months before departure
- 18% decided on the holiday 4-6 months before departure

Harmony

Description

Harmony

- Caring, cultivated, contemporary, friendly and generous

Segment size 7%



Segment core:

- The basic motivation for going on holidays is to RECONNECT WITH A SENSE OF HARMONY AND BALANCE, relaxation and recreation.
- A holiday abroad provides opportunities for self-pampering, light-heartedness and lifting spirits. Provides a sense of reconnecting with the whole world, belonging to a broader community.
- A holiday abroad guarantees pleasurable/indulgent experience, lots of new and bright impressions.
- Experiences/satisfaction are key: Shift of mood and emotions in positive direction, restores the sense of harmony and balance within oneself and one's environment, provides a wide variety of new sensorial experiences – try, touch, sense. Restaurants, local food, cities, shopping etc.
- Enjoy the dedicated service provided, the thoughtful care of staff at their holiday resort, to let themselves be fully pampered, helping them to escape from their stressful lives, to unwind and leave all responsibilities behind.

Most important differentiators:

- Personality:
 - Caring
 - Cultivated
 - Contemporary
 - Friendly
 - Generous
- Emotional benefits:
 - Gives me a safe feeling
 - Allows me to let go without restrictions
 - Give me a sense of being well cared for
 - Allows me to pamper myself
- Destination characteristics:
 - Is safe
 - Has interesting sights
 - Has good service
 - Has friendly people
 - Has good local cuisine
- Activities:
 - Visit restaurants
 - Taste local food and drink
 - Attend sightseeing tours
 - Discover local history and legends
 - Visit parks and gardens
- Type of holiday:
 - Visiting friends and relatives
 - Sightseeing/round trip
 - Sun and beach holiday

Harmony

- Caring, cultivated, contemporary, friendly and generous



Who:

- Female dominance (59%), 30-39 years is the most dominant age group (31%). 25-49 years constitutes 73% of the sample
- They travel with their spouse/partner (51%) and/or friends (25%)
- Educational level: Higher education (74%)
- Marital status: Married with children (52%), Single without children (18%).

How do they travel:

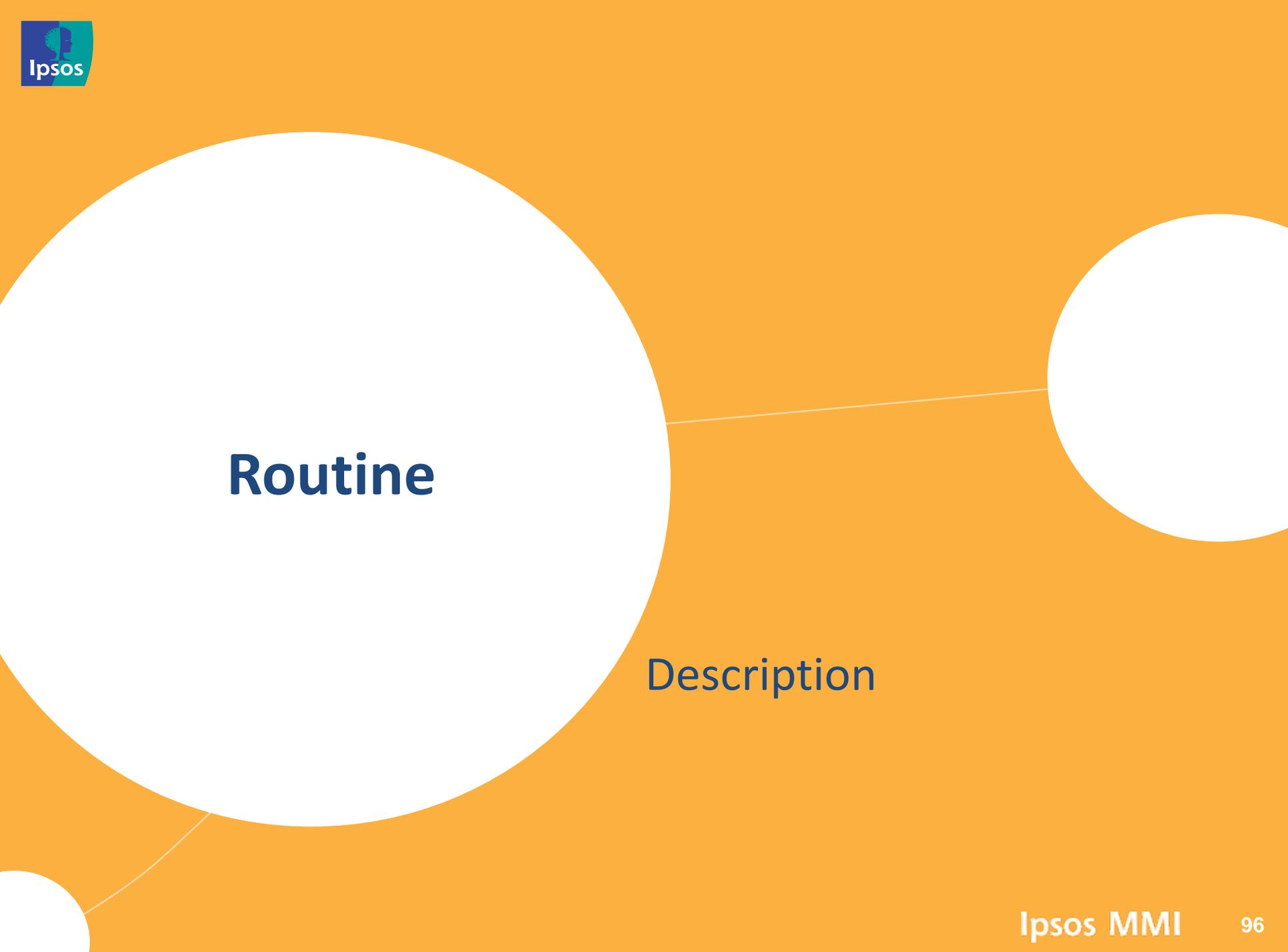
- Transport to destination dominated by scheduled flight (38%), car (27%) and charter flight (23%)
- Transport during stay dominated by bus (45%), plane (21%) or rented car (17%)
- Most common accommodation:
 - Hotel medium standard (33%)
 - Hotel high standard (17%)
- 41% of them organized the trip themselves and travelled independently, 25% had the trip organized by others and travelled independently, while 33% travelled in a group with a organized tour
- Their choice of holiday/destination is influenced by their partner (51%) or their friends (25%)

• Information sources:

- Internet in general (71%)
- Advice from friends/family (37%)
- Websites about destination (35%)
- Hotel/accommodation websites (27%)

• Planning horizon:

- 17% decided on the holiday 1-3 weeks before departure
- 16% decided on the holiday up to 1 month before departure
- 25% decided on the holiday up to 2 months before departure
- 12% decided on the holiday up to 3 months before departure
- 19% decided on the holiday 4-6 months before departure



Routine

Description

Routine

- Predictable, practical and structured

Segment
size 6%



Segment core:

- The basic motivation for going on holidays is to have things much as they are at home. They bring their normal world into the new world. This could be a cottage holiday or visiting friends but also sun and beach.
- No surprises, practical and structured holidays, so that they can relax and recharge. They often don't have a lot of time, so the holiday needs to be structured. They also often travel with small children and hence need to feel in control.
- They deal with the escapism of holidays in a restrained manner. The new world makes them feel insecure and they don't know what to expect or what they need to be aware of. They therefore try to gather as much information as possible before the holiday.
- As they need to have a certain sense of security, they usually stay in one place during their holidays. Staying in different places would be a constant reminder of their own insecurity.

Most important differentiators:

• Personality:

- Predictable
- Structured
- Practical
- Friendly
- Cozy
- Cultivated

• Emotional benefits:

- Avoids too many surprises
- Allows me to keep everything under control
- Gives me a safe feeling

• Destination characteristics:

- Is safe
- Has quiet environments
- Has good service
- Is easy to travel to
- Has friendly people
- Is not too warm

• Activities:

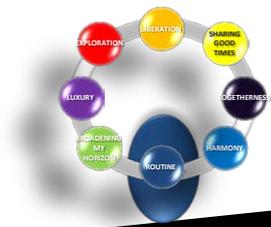
- Taste local food and drink
- Visit park and gardens
- Visit restaurants
- Shopping
- Visit cities

• Type of holiday:

- Visiting friends and relatives
- Sightseeing/roundtrip
- Sun and beach holiday
- City trip/city break
- Ski holiday

Routine

- Predictable, practical and structured



Who:

- A marginal female dominance, 50-59 years is the most dominant age group. The age group 40-59 years constitutes 51% of the sample.
- They travel with their spouse/partner (57%), other family/relatives (18%) and/or friends (20%).
- Educational level: Higher education (42%), Incomplete higher (30%), Secondary vocational (20%).
- Marital status: Married with children (40%), Single without children (27%), Married without children (12%), Cohabitant/partner without children (11%).

How do they travel:

- Transport to destination dominated by car (29%), bus (27%) and scheduled flight (25%).
- Transport during stay dominated by bus(41%) or rented car (22%)
- Most common accommodation:
 - Hotel medium standard (28%)
 - Hotel high standard (18%)
 - Hotel budget (14%)
- 52% of them organized the trip themselves and travelled independently, 14% had the trip organized by others and travelled independently, while 33% travelled in a group with a organized tour
- Their choice of holiday/destination is influenced by their partner (43%) or parents /other relatives (21%)

• Information sources:

- Internet in general (61%)
- Advice from friends/family (30%)
- Websites about destination (28%)
- Hotel/accommodation websites (25%)

• Planning horizon:

- 18% decided on the holiday 1-3 weeks before departure
- 18% decided on the holiday up to 1 month before departure
- 24% decided on the holiday up to 2 months before departure
- 14% decided on the holiday up to 3 months before departure
- 11% decided on the holiday 4-6 months before departure

Broadening your Horizon

Description

Broadening your Horizon

- Authentic, friendly, open-minded, cultivated and explorative

Segment
size 25%



Segment core:

- The basic motivation for going on holidays is to EXPAND ONE'S KNOWLEDGE; to learn.
- A holiday abroad is about discovering new and interesting places. It is a time in which you experience freedom and independence, of not thinking of others. A time to escape from daily duties, responsibilities and obligations. Holidays abroad serve as an opportunity to learn about a different type of world, to gain more knowledge. Holidays abroad are opportunities for personal growth and a chance to experience new things.
- There is also an element of cultural exploration.
- Exploring a new and unknown world comes with feelings of insecurity. The trips also tend to be short breaks. They try to control this by gathering information before their visit and preparing themselves.
- They are looking for destinations where there is a lot going on, where they can experience many things. They want to absorb as much knowledge as possible and achieve personal growth.
- Ancient cultures and famous sites are important.

Most important differentiators:

- Personality:
 - Authentic
 - Open-minded
 - Cultivated
 - Explorative
- Emotional benefits:
 - Allows me to broaden my horizon
 - Allows me to discover new and interesting places
 - Allows me to broaden my knowledge
 - Enriches my view of the world
- Destination characteristics:
 - Has interesting sights
 - Has interesting culture and art
 - Has rich cultural heritage
 - Has friendly people

• Activities:

- Sightseeing
- Visit historical buildings/sites
- Taste local food and drink
- Experience local architecture
- Discover local history and legends
- Visit cities

• Type of holiday:

- Sightseeing/roundtrip
- Visiting friends/relatives
- City trip/city break

Broadening your Horizon

- Authentic, friendly, open-minded, cultivated and explorative



Who:

- High female dominance (64%), 30-39 years is the most dominant age group (33%), 25-49 constitutes 73% of the sample.
- They travel with their spouse/partner (49%) and/or friends (23%).
- Educational level: Higher education (79%).
- Marital status: Married with children (49%), Single without children (21%), Married without children (13%).

How do they travel:

- Transport to destination dominated by scheduled flight (34%), charter flight (28%) and bus (28%)
- Transport during stay dominated by bus (55%), or rented car (21%)
- Most common accommodation:
 - Hotel medium standard (46%)
 - Hotel budget (18%)
 - Hotel high standard (12%)
- 47% of them organized the trip themselves and travelled independently, 21% had the trip organized by others and travelled independently, while 31% travelled in a group with a organized tour
- Their choice of holiday/destination is influenced by their partner (49%), kids under 14 years (21%), their friends (23%), or other family (17%)

• Information sources:

- Internet in general (82%)
- Websites about destination (53%)
- Hotel/accommodation websites (47%)
- Reviews from other travelers online (42%)

• Planning horizon:

- 16% decided on the holiday 1-3 weeks before departure
- 16% decided on the holiday up to 1 month before departure
- 25% decided on the holiday up to 2 months before departure
- 15% decided on the holiday up to 3 months before departure
- 17% decided on the holiday 4-6 months before departure



Luxury

Description

Luxury

- Luxurious, extravagant, superior and indulgent



Segment size 2%

Segment core:

- The basic motivation for going on holidays is to IMPRESS OTHERS, to stand out from the crowd.
- This kind of holiday abroad serves as proof of one's superiority, high social class, success, stability.
- Reasons for going on holidays abroad: to indulge in higher living standards and comfort, to get a sense of self-pride and proof of one's accomplishment.
- Experiences/satisfaction are key: be surrounded by luxury, 'bathe' in self-respect and superiority, demonstrate one's achievements and gain a sense of power.
- It is about shopping, visiting restaurants and getting pampered.

Most important differentiators:

- Personality:
 - Luxurious
 - Classy
 - Superior
 - Extravagant
 - Indulgents
- Emotional benefits:
 - Allows me to impress other people
 - Allows me to indulge in a bit of luxury
 - Makes me feel special
 - Allows me to show my superior lifestyle
 - Shows that I am successful in life
- Destination characteristics:
 - Is an upper class destination
 - Has interesting sights
 - Is expensive
 - Has a variety of different restaurant offers
 - Has good service

- Activities:
 - Shopping
 - Visit museums
 - Visit restaurants
 - Visit art exhibitions

- Type of holiday:
 - Visiting friends and relatives
 - Ski holiday
 - Sightseeing/round trip
 - Sun and beach holiday

Luxury

- Luxurious, extravagant, superior and indulgent



Who:

- A high female dominance (60%), 30-39 years is the most dominant age group (41%). The age group 18-39 years constitutes 84% of the sample.
- They travel with their spouse/partner (43%), friends (27%) and/or children 7-14 years (22%).
- Educational level: Higher education (76%) or Incomplete higher (11%).
- Marital status: Married with children (54%), Single without children (19%), Married without children (14%).

How do they travel:

- Transport to destination dominated by scheduled flight (33%) and bus (27%)
- Transport during stay dominated by bus (35%) or rented car (30%)
- Most common accommodation:
 - Hotel medium standard (46%)
 - Hotel high standard (8%)
 - Cabin (8%)
- 43% of them organized the trip themselves and travelled independently, 24% had the trip organized by others and travelled independently, while 32% travelled in a group with a organized tour
- Their choice of holiday/destination is influenced by their partner (30%), their friends (24%), or other family (24%)

• Information sources:

- Internet in general (62%)
- Advice from friends and family (43%)
- Websites about destination (35%)
- Websites for carriers like airlines etc (24%)

• Planning horizon:

- 11% decided on the holiday 1-3 weeks before departure
- 16% decided on the holiday up to 1 month before departure
- 32% decided on the holiday up to 2 months before departure
- 11% decided on the holiday up to 3 months before departure
- 11% decided on the holiday 4-6 months before departure
- 14% decided on the holiday 6-12 months before departure

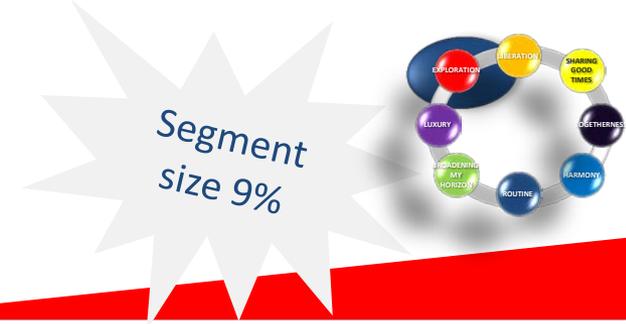


Exploration

Description

Exploration

- Explorative, adventurous and unique



Segment core:

- The basic motivation for going on holidays is to GET RICH EXPERIENCES, to refresh body and mind, rejuvenate and satisfy a hunger for unique impressions. Role of holidays abroad: to present maximum opportunities for exploration of the self and the world, and to maximise experience.
- Reasons for going on holidays abroad: to derive pleasure from learning new skills, to be a pioneer in terms of destinations and activities, aspire to try them first, to be the first ones there.
- Experiences/satisfaction are key: active, always on the move, recharging and challenging body and mind. Inspired by new knowledge and experiences. They are innovative with respect to travelling style, e.g. new means of transport (e.g. not just car or ship, BUT bike, helicopter), activities and holiday planning (e.g. Interactive websites).

Most important differentiators:

- Personality:
 - Explorative
 - Adventurous
 - Unique
 - Daring
- Emotional benefits:
 - Gives me rich experiences
 - Enriches my view of the world
 - Allows me to discover new and interesting places
 - Helps me escape from my hectic daily life
 - Allows me to broaden my knowledge
- Destination characteristics:
 - Has interesting sights
 - Has good local cuisine
 - Has beautiful nature
 - Has a rich cultural heritage
 - Has friendly people
- Activities:
 - Taste local food and drink
 - Visit historical buildings/sites
 - Attend sightseeing tours
 - Visit cities
 - Discover local culture and lifestyle
- Type of holiday:
 - Sightseeing/roundtrip
 - Visiting friends and relatives
 - City trip/city break

Exploration

- Explorative, adventurous and unique



Who:

- A female dominance (58%), 30-49 years is the most dominant age group (35%). 18-39 years constitutes 83% of the sample.
- They travel with their spouse/partner (54%), friends (24%) and/or other family/relatives (no kids).
- Educational level: Higher education (74%) or incomplete higher (15%).
- Marital Status: Married with children (44%), Single without children (25%), Cohabitant/partner without children (10%), Married without children (12%).

How do they travel:

- Transport to destination dominated by scheduled flight (35%) and bus (28%)
- Transport during stay dominated by bus (45%) or rented car (25%)
- Most common accommodation:
 - Hotel medium standard (39%)
 - Hotel budget (19%)
 - Hotel high standard (17%)
- 42% of them organised the trip themselves and travelled independently. 36% travelled in a group with an organized tour and 20% had the trip organized by others and traveled independently
- Their choice of holiday/destination is influenced by their partner (37%), no one except themselves (28%), their friends (25%) or parents/other relatives (15%)

• Information sources:

- Internet in general (75%)
- Websites about destination (42%)
- Websites for hotels etc (38%)
- Reviews from other travelers online (37%)

• Planning horizon:

- 15% decided on the holiday 1-3 weeks before departure
- 14% decided on the holiday up to 1 month before departure
- 27% decided on the holiday up to 2 months before departure
- 13% decided on the holiday up to 3 months before departure
- 16% decided on the holiday 4-6 months before departure

B) Competing destinations

Common ground analysis

How to read the scorecards

Emotional benefits		
(n=323)	%	Index
Allow s me to share good times w ith others	62,5	107
Allow s me to discover new and interesting places	57,3	85
Gives me a safe feeling	57,0	146
Helps me to escape from my hectic daily life	56,3	99
Helps me to meet new people	54,2	104
<u>Avoids too much surprises</u>	44,6	187
<u>Gives me a sense of being well cared for</u>	48,3	136
<u>Allow s me to keep everything under control</u>	33,7	136

Items at the top of the list = many respondents have ticked this = core of the subject

Items at the top of the list in bold = over index = is unique to the subject, i.e. differs from other subjects. I.e. if Norway has a high index on an item, this item makes Norway different from other destinations.

Items at the bottom of the list underlined = low rating, but high index

Comparison Austria vs. Norway (Russian base)

Destination features	
Unique to Norway	<ul style="list-style-type: none"> Has beautiful nature Has unspoiled nature Has nature that offers opportunities for discovery Allows me to live close to nature Allows me to have a unique experience
Common ground	<ul style="list-style-type: none"> Is not too warm Has environmentally friendly offers Has quiet environments Is safe
Unique to Austria	<ul style="list-style-type: none"> Has a rich cultural heritage Has interesting culture and art Is easy to travel around Has classy restaurants

Emotional benefits	
Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places Helps me to escape from my hectic daily life Restores my sense of harmony and balance Allows me to come to my senses
Common ground	<ul style="list-style-type: none"> Gives me a safe feeling
Unique to Austria	<ul style="list-style-type: none"> Allows me to spoil my loved ones Gives me a sense of being well cared for Allows me to indulge myself in a bit of luxury Shows that I am successful in life

Activities	
Unique to Norway	<ul style="list-style-type: none"> Observe beauty of nature Experience wilderness Observe natural phenomenon (i.e. northern lights etc.) Experience wildlife
Common ground	<ul style="list-style-type: none"> Do winter activities (dog-sleigh, snowmobile etc.) Experience mountains Alpine skiing/snowboarding Cross-country skiing
Unique to Austria	<ul style="list-style-type: none"> Hiking (less than two hours) Cycling Visit spa resorts

Personality	
Unique to Norway	<ul style="list-style-type: none"> Explorative Contemporary Unique Authentic Soothing
Common ground	<ul style="list-style-type: none"> Fresh Cultivated Harmonious Peaceful
Unique to Austria	<ul style="list-style-type: none"> Cozy Luxurious Classy

Scorecard – Austria Russian base

Emotional benefits		
(n=50)	%	Index
Allow s me to broaden my horizon	68,0	100
Allow s me to broaden my know ledge	64,0	101
Gives me a safe feeling	62,0	134
Allow s me to spoil my loved ones	56,0	114
Allow s me to discover new and interesting places	56,0	85
<u>Makes me feel sophisticated</u>	42,0	157
<u>Show s that I am successful in life</u>	44,0	154
<u>Allow s me to show my superior lifestyle</u>	32,0	139
<u>Makes me stand out from the crowd</u>	32,0	131

Destination features		
(n=50)	%	Index
Has attractive mountain areas	82,0	174
Has rich cultural heritage	82,0	125
Has interesting sights	76,0	104
Has interesting culture & art	76,0	115
Has good service	76,0	122
<u>Is an upper class destination</u>	48,0	166
<u>Is expensive</u>	50,0	143
<u>Is safe</u>	72,0	138
<u>Is not too w arm</u>	62,0	136
<u>Has good medical care</u>	60,0	130
<u>Has classy restaurants</u>	62,0	130
<u>Has environmentally friendly offers</u>	58,0	127
<u>Allow s me to be physical active</u>	68,0	121

Personality		
(n=50)	%	Index
Cultivated	72,0	156
Peaceful	58,0	145
Harmonious	56,0	123
Cozy	56,0	122
Authentic	46,0	100
Luxurious	46,0	143
Active	46,0	96
Contemporary	46,0	96
<u>Superior</u>	36,0	189
<u>Indulgent</u>	26,0	137
<u>Structured</u>	42,0	134
<u>Classy</u>	42,0	122

Activity		
(n=50)	%	Index
Experience mountains	76,0	168
Visit historical buildings/sites	76,0	112
Hiking (more than two hours)	74,0	125
Hiking (less than tw o hours)	74,0	118
Visit museums	74,0	116
<u>Alpine skiing/snow boarding</u>	72,0	218
<u>Do w inter activities (dog-sleigh, snow mobile etc)</u>	50,0	192
<u>Attend theatre, ballet, opera performances</u>	60,0	170
<u>Cross country skiing</u>	38,0	168
<u>Extreme sport activities (mountain climbing, kiting, paragliding etc)</u>	52,0	159
<u>Visit art exhibitions</u>	60,0	135
<u>Attend concerts/festivals</u>	58,0	132
<u>Take part in a course/ educational activity</u>	34,0	125
<u>Visit parks and gardens</u>	70,0	120

Comparison Canada vs. Norway (Russian base)

	Destination features
Unique to Norway	<ul style="list-style-type: none"> Has beautiful nature Has nature that offers opportunities for discovery Is well organized Has attractive mountain areas
Common ground	<ul style="list-style-type: none"> Is not too warm Has environmentally friendly offers Has unspoiled nature Is safe Is not ruined by tourism
Unique to Canada	<ul style="list-style-type: none"> Has good opportunity to meet local people

	Emotional benefits
Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places Allows me to come to my senses Restores my sense of harmony and balance
Common ground	<ul style="list-style-type: none"> Helps me to escape from my hectic daily life Gives me a safe feeling Makes me feel completely liberated
Unique to Canada	<ul style="list-style-type: none"> Allows me to broaden my knowledge Helps me meet new people

	Activities
Unique to Norway	<ul style="list-style-type: none"> Observe beauty of nature Experience mountains Saltwater fishing
Common ground	<ul style="list-style-type: none"> Experience wildlife Observe natural phenomenon (i.e. northern lights etc.) Experience wilderness Do winter activities (dog-sleigh, snowmobile etc.) Visit national parks Alpine skiing/snowboarding Cross-country skiing
Unique to Canada	<ul style="list-style-type: none"> None

	Personality
Unique to Norway	<ul style="list-style-type: none"> Fresh Cultivated Explorative Peaceful Harmonious
Common ground	<ul style="list-style-type: none"> Structured Caring
Unique to Canada	<ul style="list-style-type: none"> Practical Predictable Classy

Emotional benefits		
(n=92)	%	Index
Helps me to meet new people	43,5	110
Allows me to broaden my knowledge	43,5	112
Gives me a safe feeling	38,0	135
Helps me to enjoy life to the fullest	37,0	106
Avoids too much surprises	37,0	189
<u>Allows me to show my superior lifestyle</u>	18,5	132
<u>Allows me to impress other people</u>	21,7	126

Destination features		
(n=92)	%	Index
Has good opportunities to meet local people	47,8	117
Has good medical care	42,4	149
Is safe	41,3	128
Has places to go out partying	40,2	101
Allows me to be physical active	39,1	113
Has a variety of accommodation offers	39,1	94
<u>Allows me to grow personally</u>	34,8	157
<u>Has no kids</u>	20,7	152
<u>Is not too warm</u>	38,0	135
<u>Is expensive</u>	28,3	131
<u>Has unspoiled nature</u>	28,3	128
<u>Is not ruined by tourism</u>	27,2	124
<u>Allows me to have unique experiences</u>	37,0	122
<u>Allows me to live close to nature</u>	33,7	120

Personality		
(n=92)	%	Index
Contemporary	32,6	106
Outgoing	31,5	104
Practical	31,5	145
Authentic	31,5	107
Friendly	30,4	90
<u>Indulgent</u>	23,9	196
<u>Superior</u>	17,4	142
<u>Daring</u>	26,1	137
<u>Predictable</u>	26,1	133
<u>Structured</u>	26,1	129
<u>Generous</u>	25,0	122

Activity		
(n=92)	%	Index
Visit national parks	51,1	155
Do winter activities (dog-sleigh, snowmobile etc)	46,7	289
Observe beauty of nature	41,3	104
Experience local architecture	39,1	96
Attend sightseeing tours	37,0	80
Hiking (more than two hours)	37,0	101
Relaxation	37,0	104
<u>Cross country skiing</u>	33,7	241
<u>Rafting</u>	23,9	177
<u>Take part in a course/ educational activity</u>	29,3	175
<u>Fresh water fishing</u>	30,4	171
<u>Kayaking/canoeing</u>	25,0	169
<u>Workout in gym/fitness centre</u>	30,4	146
<u>Extreme sport activities (mountain climbing, kiting, paragliding etc)</u>	29,3	145
<u>Visit or take part in sports events</u>	27,2	143
<u>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune)</u>	27,2	122
<u>Alpine skiing/snow boarding</u>	25,0	122

Comparison Denmark vs. Norway (Russian base)

Destination features

Unique to Norway	<ul style="list-style-type: none"> Has beautiful nature Has unspoiled nature Has nature that offers opportunities for discovery Allows me to be active Allows me to live close to nature
Common ground	<ul style="list-style-type: none"> Is not too warm Has environmentally friendly offers Has quiet environments Is safe
Unique to Denmark	<ul style="list-style-type: none"> Has interesting sights Has good service Has a variety of accommodation offers Has interesting culture and art

Emotional benefits

Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places Helps me to escape from my hectic daily life Restores my sense of harmony and balance Allows me to come to my senses Makes me feel completely liberated
Common ground	<ul style="list-style-type: none"> Gives me a safe feeling Avoids too many surprises
Unique to Denmark	<ul style="list-style-type: none"> Gives me rich experiences

Activities

Unique to Norway	<ul style="list-style-type: none"> Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc.) Experience wilderness Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc.)
Common ground	<ul style="list-style-type: none"> Experience wildlife Cross country skiing
Unique to Denmark	<ul style="list-style-type: none"> Attend sightseeing tours Visit museums Discover local history and legends Experience architecture

Personality

Unique to Norway	<ul style="list-style-type: none"> Fresh Explorative Contemporary Authentic
Common ground	<ul style="list-style-type: none"> Cultivated Peaceful Harmonious Unique Soothing
Unique to Denmark	<ul style="list-style-type: none"> Friendly Cozy

Emotional benefits		
(n=43)	%	Index
Gives me a safe feeling	62,8	157
Allows me to broaden my horizon	60,5	103
Helps me to meet new people	55,8	100
Allows me to broaden my knowledge	55,8	102
Enriches my view on the world	55,8	103
Allows me to discover new and interesting places	55,8	98
<u>Avoids too much surprises</u>	39,5	142
<u>Makes me feel special</u>	32,6	129

Destination features		
(n=43)	%	Index
Has interesting sights	79,1	132
Has good service	69,8	136
Has quiet environments	67,4	161
Has rich cultural heritage	65,1	121
Has a variety of accommodation offers	65,1	118
<u>Is not too warm</u>	60,5	161
<u>Has classy restaurants</u>	55,8	142
<u>Is safe</u>	58,1	136
<u>Is not for just anybody, is exclusive</u>	23,3	132
<u>Has environmentally friendly offers</u>	46,5	125
<u>Has good medical care</u>	46,5	123

Personality		
(n=43)	%	Index
Cultivated	62,8	166
Cozy	51,2	136
Friendly	51,2	120
Peaceful	46,5	142
Harmonious	41,9	113
Soothing	41,9	138
Contemporary	41,9	108

Activity		
(n=43)	%	Index
Attend sightseeing tours	72,1	119
Visit museums	69,8	135
Discover local history and legends	67,4	123
Taste local food and drink	65,1	111
Experience local architecture	65,1	122
<u>Attend concerts/festivals</u>	53,5	150
<u>Visit art exhibitions</u>	46,5	129
<u>Bicycling</u>	46,5	128
<u>Attend theatre, ballet, opera performances</u>	34,9	122

Comparison Finland vs. Norway (Russian base)

Destination features	
Unique to Norway	<ul style="list-style-type: none"> Allows me to have unique experiences Is expensive Has attractive mountain areas
Common ground	<ul style="list-style-type: none"> Has beautiful nature Is not too warm Has environmentally friendly offers Has unspoiled nature Has nature that offers opportunities for discovery Is safe
Unique to Finland	<ul style="list-style-type: none"> Is easy to travel to Has good service Is easy to travel around Has good shopping

Emotional benefits	
Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places
Common ground	<ul style="list-style-type: none"> Helps me to escape from my hectic daily life Gives me a safe feeling Restores my sense of balance Allows me to come to my senses
Unique to Finland	<ul style="list-style-type: none"> Allows me to share good times with others

Activities	
Unique to Norway	<ul style="list-style-type: none"> Observe beauty of nature Visit national parks Experience mountains
Common ground	<ul style="list-style-type: none"> Experience wildlife Experience the wilderness Do winter activities (dog-sleigh, snowmobile etc) Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)
Unique to Finland	<ul style="list-style-type: none"> Hiking (less than two hours) Shopping Hiking (more than two hours) Bicycling Relaxation Visit the countryside

Personality	
Unique to Norway	<ul style="list-style-type: none"> Explorative Contemporary Unique Authentic
Common ground	<ul style="list-style-type: none"> Fresh Cultivated Peaceful Harmonious Soothing
Unique to Finland	<ul style="list-style-type: none"> Cozy Practical

Emotional benefits		
(n=378)	%	Index
Gives me a safe feeling	67,7	164
Allow s me to share good times with others	61,1	116
Allow s me to broaden my horizon	60,1	99
Helps me to escape from my hectic daily	59,5	131
Allow s me to discover new and interesting places	57,4	98
<u>Avoids too much surprises</u>	45,0	156
<u>Allow s me to keep everything under control</u>	36,0	125
<u>Restores my sense of harmony and balance</u>	50,3	123

Destination features		
(n=378)	%	Index
Is not too warm	83,3	189
Is easy to travel to	82,8	173
Has quiet environments	78,6	160
Has beautiful nature	77,2	115
Is safe	76,7	153
<u>Has unspoiled nature</u>	66,4	193
<u>Is not too different from home</u>	46,3	169
<u>Has environmentally friendly offers</u>	73,8	168
<u>Allow s me to live close to nature</u>	72,8	166
<u>Is not ruined by tourism</u>	49,5	145
<u>Has good shopping</u>	65,6	139
<u>Allow s me to be physical active</u>	70,6	131
<u>Has good medical care</u>	57,4	129
<u>Is well organized</u>	60,8	124
<u>Is easy to travel around</u>	65,9	121

Personality		
(n=378)	%	Index
Peaceful	63,2	174
Soothing	56,3	167
Cozy	55,8	133
Harmonious	53,4	129
Cultivated	51,3	122
<u>Practical</u>	49,2	160
<u>Predictable</u>	42,1	152
<u>Structured</u>	37,6	132
<u>Relaxed</u>	44,2	131

Activity		
(n=378)	%	Index
Observe beauty of nature	69,6	110
Fresh water fishing	69,3	245
Hiking (less than two hours)	69,0	112
Do winter activities (dog-sleigh, snowmobile etc)	68,8	268
Shopping	65,3	133
<u>Cross country skiing</u>	56,6	254
<u>Alpine skiing/snow boarding</u>	55,3	170
<u>Experience the wilderness</u>	50,0	146
<u>Kayaking/canoeing</u>	33,9	144
<u>Bicycling</u>	63,0	143
<u>Experience wildlife</u>	56,1	137
<u>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune)</u>	45,5	129
<u>Visit the countryside</u>	61,1	123
<u>Visit or take part in sports events</u>	36,8	121



Comparison New Zealand vs. Norway (Russian base)

Destination features		Activities	
Unique to Norway	Is safe Allows me to be physical active Has good medical care Is well organized	Unique to Norway	Do winter activities (dog-sleigh, snowmobile etc.) Experience mountains Alpine skiing/snowboarding Cross-country skiing
Common ground	Has beautiful nature Is not too warm Has environmentally friendly offers Has unspoiled nature Has quiet environments Has nature that offers opportunities for discovery	Common ground	Observe beauty of nature Experience the wildlife Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) Experience the wilderness Visit national parks
Unique to New Zealand	Has romantic spots	Unique to New Zealand	Nothing

Emotional benefits		Personality	
Unique to Norway	Helps me to escape from my hectic daily life Gives me a safe feeling	Unique to Norway	Cultivated Harmonious Contemporary Authentic
Common ground	Allows me to discover new and interesting places Restores my sense of harmony and balance Allows me to come to my senses	Common ground	Fresh Explorative Peaceful Unique Soothing
Unique to New Zealand	Nothing	Unique to New Zealand	Nothing

Emotional benefits (n=110)	%	Index
Allows me to discover new and interesting places	48,2	122
Allow s me to broaden my horizon	43,6	107
Allow s me to broaden my know ledge	34,5	91
Enriches my view on the world	34,5	92
Makes me feel completely liberated	33,6	130
Allow s me to come to my senses	33,6	117
Restores my sense of harmony and balance	33,6	122
<u>Makes me stand out from the crow d</u>	23,6	161
<u>Makes me feel special</u>	28,2	160
<u>Allow s me to impress other people</u>	22,7	134
<u>Allow s me to show my superior lifestyle</u>	18,2	132
<u>Makes me feel on top of the world</u>	20,9	124

Destination features (n=110)	%	Index
Has nature that offers opportunities for discovery	49,1	177
Has beautiful nature	47,3	118
Has environmentally friendly offers	47,3	181
Has romantic spots	41,8	126
Has quiet environments	40,9	139
Has unspoiled nature	40,9	199
<u>Is not for just anybody, is exclusive</u>	30,0	243
<u>Is not ruined by tourism</u>	40,0	196
<u>Allow s me to live close to nature</u>	39,1	150
<u>Is expensive</u>	30,0	150
<u>Has no kids</u>	16,4	130
<u>Allow s me to have unique experiences</u>	35,5	126
<u>Has guaranteed sunshine</u>	26,4	125
<u>Has few language barriers</u>	26,4	121

Personality (n=110)	%	Index
Fresh	38,2	166
Open-minded	36,4	139
Peaceful	36,4	140
Unique	34,5	148
Explorative	31,8	119
<u>Extravagant</u>	24,5	151
<u>Superior</u>	17,3	140
<u>Crazy</u>	20,0	128
<u>Playful</u>	24,5	127
<u>Adventurous</u>	24,5	122

Activity (n=110)	%	Index
Observe beauty of nature	43,6	129
Taste local food and drink	40,9	107
Discover local culture and lifestyle	40,0	113
Experience wildlife	40,0	184
Visit national parks	36,4	130
<u>Kayaking/canoeing</u>	24,5	196
<u>Experience the w ilderness</u>	33,6	184
<u>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking w aves, sand dune)</u>	31,8	169
<u>Rafting</u>	19,1	166
<u>Diving</u>	26,4	166
<u>Fresh water fishing</u>	24,5	162
<u>Salt water fishing</u>	29,1	159
<u>Sailing</u>	23,6	131
<u>Extreme sport activities (mountain climbing, kiting, paragliding etc)</u>	21,8	127

Comparison Sweden vs. Norway (Russian base)

	Destination features
Unique to Norway	<ul style="list-style-type: none"> Has beautiful nature Has nature that offers opportunities for discovery Allows me to be physical active Allows me to live close to nature Allows me to have unique experiences Is expensive
Common ground	<ul style="list-style-type: none"> Is not too warm Has environmentally friendly offers Has unspoiled nature Has quiet environments Is safe
Unique to Sweden	<ul style="list-style-type: none"> Has good service Is easy to travel to Has classy restaurants

	Emotional benefits
Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places Helps me to escape from my hectic daily life Restores my sense of harmony and balance Allows me to come to my senses
Common ground	<ul style="list-style-type: none"> Gives me a safe feeling
Unique to Sweden	Nothing

	Activities
Unique to Norway	<ul style="list-style-type: none"> Observe beauty of nature Experience wildlife Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) Experience mountains Saltwater fishing
Common ground	<ul style="list-style-type: none"> Do winter activities (dog-sleigh, snowmobile etc.) Experience the wilderness Visit national parks Alpine skiing/snowboarding Cross country skiing
Unique to Sweden	<ul style="list-style-type: none"> Visit cities Experience local architecture Visit museums Visit art exhibitions

	Personality
Unique to Norway	<ul style="list-style-type: none"> Authentic Active Adventurous Unique Explorative
Common ground	<ul style="list-style-type: none"> Peaceful Harmonious Relaxed Soothing
Unique to Sweden	<ul style="list-style-type: none"> Cozy Caring

Emotional benefits		
(n=122)	%	Index
Gives me a safe feeling	64,8	160
Allows me to discover new and interesting places	63,1	110
Allows me to broaden my horizon	59,0	99
Helps me to meet new people	57,4	101
Allows me to broaden my knowledge	57,4	103
<u>Allows me to keep everything under control</u>	36,1	128
<u>Avoids too much surprises</u>	35,2	125

Destination features		
(n=122)	%	Index
Is not too warm	77,0	180
Is safe	75,4	154
Has good service	73,0	125
Has quiet environments	71,3	149
Has good medical care	67,2	156
<u>Has unspoiled nature</u>	48,4	145
<u>Is not ruined by tourism</u>	45,1	136
<u>Has environmentally friendly offers</u>	56,6	133
<u>Is well organized</u>	58,2	122

Personality		
(n=122)	%	Index
Cultivated	54,9	146
Contemporary	51,6	134
Cozy	50,0	134
Friendly	48,4	114
Harmonious	46,7	127
<u>Structured</u>	40,2	158
<u>Peaceful</u>	43,4	134
<u>Soothing</u>	39,3	131
<u>Fresh</u>	36,9	128
<u>Caring</u>	36,9	127
<u>Practical</u>	34,4	125

Activity		
(n=122)	%	Index
Visit cities	69,7	113
Attend sightseeing tours	68,9	105
Experience local architecture	67,2	116
Discover local history and legends	64,8	109
Visit museums	63,9	114
<u>Do winter activities (dog-sleigh, snow mobile etc)</u>	43,4	190
<u>Cross country skiing</u>	30,3	153
<u>Visit art exhibitions</u>	50,8	131
<u>Alpine skiing/snow boarding</u>	35,2	122
<u>Fresh water fishing</u>	30,3	120

Comparison Switzerland vs. Norway (Russian base)

Destination features		Activities	
Unique to Norway	<ul style="list-style-type: none"> Is not ruined by tourism Allows me to live close to nature Allows me to have unique experiences 	Unique to Norway	<ul style="list-style-type: none"> Observe natural phenomenon (i.e. northern lights etc.) Visit national parks Saltwater fishing
Common ground	<ul style="list-style-type: none"> Has beautiful nature Is not too warm Has environmentally friendly offers Has unspoiled nature Has quiet environments Has nature that offers opportunities for discovery Is safe 	Common ground	<ul style="list-style-type: none"> Observe beauty of nature Experience wildlife Do winter activities (dog-sleigh, snowmobile etc.) Experience wilderness Experience mountains Alpine skiing/snowboarding Cross-country skiing
Unique to Switzerland	<ul style="list-style-type: none"> Has good service Has romantic spots Has classy restaurants Is an upper class destination 	Unique to Switzerland	<ul style="list-style-type: none"> Relaxation Get pampered
Emotional benefits		Personality	
Unique to Norway	<ul style="list-style-type: none"> Allows me to discover new and interesting places Helps me to escape from my hectic daily life Restores my sense of harmony and balance 	Unique to Norway	<ul style="list-style-type: none"> Authentic Active Soothing Unique Adventurous
Common ground	<ul style="list-style-type: none"> Gives me a safe feeling Allows me to come to my senses 	Common ground	<ul style="list-style-type: none"> Peaceful
Unique to Switzerland	<ul style="list-style-type: none"> Allow me to indulge in a bit of luxury Gives me a sense of being well cared for Shows that I am successful in life 	Unique to Switzerland	<ul style="list-style-type: none"> Cultivated Structured Classy Cozy

Scorecard – Switzerland : Russian base

Emotional benefits (n=45)	%	Index
Gives me a safe feeling	68,9	133
Allow s me to discover new and interesting places	68,9	94
Allow s me to broaden my horizon	64,4	85
Allow s me to come to my senses	62,2	116
Gives me a sense of being well cared for	62,2	119
Allows me to indulge myself with a bit of luxury	62,2	135
<u>Show s that I am successful in life</u>	55,6	174
<u>Makes me feel on top of the world</u>	51,1	163
<u>Allow s me to show my superior lifestyle</u>	37,8	147
<u>Makes me feel special</u>	44,4	135
<u>Makes me feel sophisticated</u>	40,0	134
<u>Avoids too much surprises</u>	46,7	129

Destination features (n=45)	%	Index
Has beautiful nature	82,2	110
Has attractive mountain areas	82,2	163
Has quiet environments	80,0	147
Has good medical care	80,0	162
Has good service	80,0	120
<u>Is an upper class destination</u>	73,3	238
<u>Is not for just anybody, is exclusive</u>	51,1	223
<u>Is expensive</u>	71,1	190
<u>Has classy restaurants</u>	73,3	143
<u>Has environmentally friendly offers</u>	66,7	137
<u>Is not too warm</u>	66,7	136
<u>Is safe</u>	73,3	132
<u>Has nature that offers opportunities for discovery</u>	66,7	129
<u>Has unspoiled nature</u>	46,7	122
<u>Has romantic spots</u>	75,6	122
<u>Allow s me to grow personally</u>	46,7	121

Personality (n=45)	%	Index
Harmonious	57,8	132
Luxurious	57,8	186
Active	57,8	125
Cozy	53,3	120
Peaceful	53,3	138
Contemporary	53,3	116
<u>Classy</u>	46,7	141
<u>Structured</u>	40,0	132
<u>Soothing</u>	46,7	130
<u>Fresh</u>	42,2	124
<u>Superior</u>	22,2	121

Activity (n=45)	%	Index
Experience mountains	77,8	181
Alpine skiing/snowboarding	77,8	249
Observe beauty of nature	75,6	124
Visit cities	73,3	110
Attend sightseeing tours	71,1	101
<u>Extreme sport activities (mountain climbing, kiting, paragliding etc)</u>	57,8	186
<u>Cross country skiing</u>	33,3	156
<u>Do winter activities (dog-sleigh, snow mobile etc)</u>	37,8	153
<u>Visit spa resorts</u>	42,2	130
<u>Visit or take part in sports events</u>	37,8	130
<u>Fresh water fishing</u>	33,3	122

C) Overall positioning & targeting

Holiday types

Segments share of occasion – all markets - all destinations

	Liberation	Sharing Good Times	Togetherness	Harmony	Routine	Broadening your horizon	Luxury	Exploration
Ski holiday	42 %	14 %	16 %	3 %	8 %	5 %	2 %	10 %
Visiting friends and relatives	8 %	27 %	19 %	5 %	8 %	18 %	2 %	14 %
Hiking holiday	21 %	12 %	21 %	4 %	7 %	16 %	1 %	18 %
Fishing holiday	18 %	17 %	27 %	8 %	5 %	6 %	7 %	13 %
Sightseeing/round trip	8 %	10 %	11 %	5 %	5 %	40 %	1 %	21 %
Active holiday (golf, rafting, biking etc)	32 %	11 %	16 %	3 %	1 %	13 %	0 %	23 %
City trip/city break	9 %	14 %	10 %	3 %	4 %	40 %	2 %	17 %
Cruise holiday	2 %	14 %	13 %	9 %	4 %	45 %	1 %	12 %
Sun and beach holiday	11 %	18 %	35 %	6 %	5 %	17 %	1 %	7 %
Camping holiday	26 %	5 %	38 %	1 %	6 %	13 %	0 %	12 %
Cottage holiday (hired/own/borrowed cottage/holiday home)	12 %	7 %	39 %	7 %	10 %	17 %	0 %	7 %
Holiday to experience nature, scenery and wildlife	12 %	12 %	20 %	1 %	2 %	28 %	0 %	25 %
Short trips/extended weekend trips	9 %	18 %	30 %	8 %	7 %	23 %	0 %	5 %
Backpacking	7 %	3 %	7 %	0 %	2 %	46 %	1 %	33 %
Summer holiday/main holiday/annual leave	13 %	15 %	29 %	3 %	3 %	21 %	1 %	14 %
Total	14 %	15 %	23 %	4 %	5 %	23 %	1 %	15 %

Segments share of occasion – Russia - all destinations

	Liberation	Sharing Good Times	Togetherness	Harmony	Routine	Broadening your horizon	Luxury	Exploration
Ski holiday	38%	14%	8%	4%	11%	12%	7%	7%
Visiting friends and relatives	7%	34%	18%	6%	8%	13%	2%	12%
Hiking holiday	14%	17%	15%	10%	15%	23%	1%	5%
Fishing holiday	8%	25%	19%	11%	11%	11%	5%	10%
Sightseeing/round trip	9%	12%	9%	12%	4%	42%	1%	11%
Active holiday (golf, rafting, biking etc)	47%	0%	12%	5%	0%	13%	0%	22%
City trip/city break	8%	18%	11%	4%	6%	36%	1%	15%
Cruise holiday	7%	18%	4%	2%	5%	53%	3%	8%
Sun and beach holiday	13%	19%	27%	8%	5%	21%	1%	6%
Camping holiday	29%	5%	37%	0%	0%	29%	0%	0%
Cottage holiday (hired/own/borrowed cottage/holiday home)	13%	12%	34%	4%	4%	19%	0%	13%
Holiday to experience nature, scenery and wildlife	14%	13%	18%	1%	0%	46%	1%	5%
Short trips/extended weekend trips	5%	31%	24%	7%	7%	22%	0%	4%
Backpacking	47%	6%	8%	0%	0%	8%	10%	21%
Summer holiday/main holiday/annual leave	16%	18%	30%	6%	5%	23%	0%	3%
Total	12%	21%	17%	7%	6%	25%	2%	9%

Ski holiday – Russian tourists

N= 138



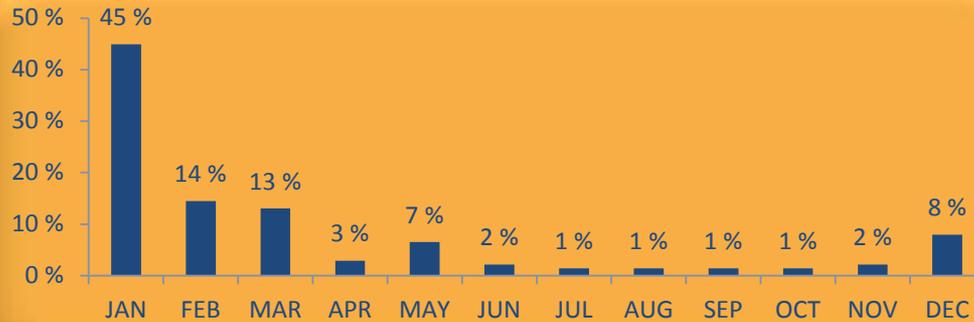
- 5W profile
- Motivations for skiing
- Role of Norway versus competitive landscape
 - destination versus motivation within ski holiday
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for skiing

WHO travels

DEMOGRAPHICS

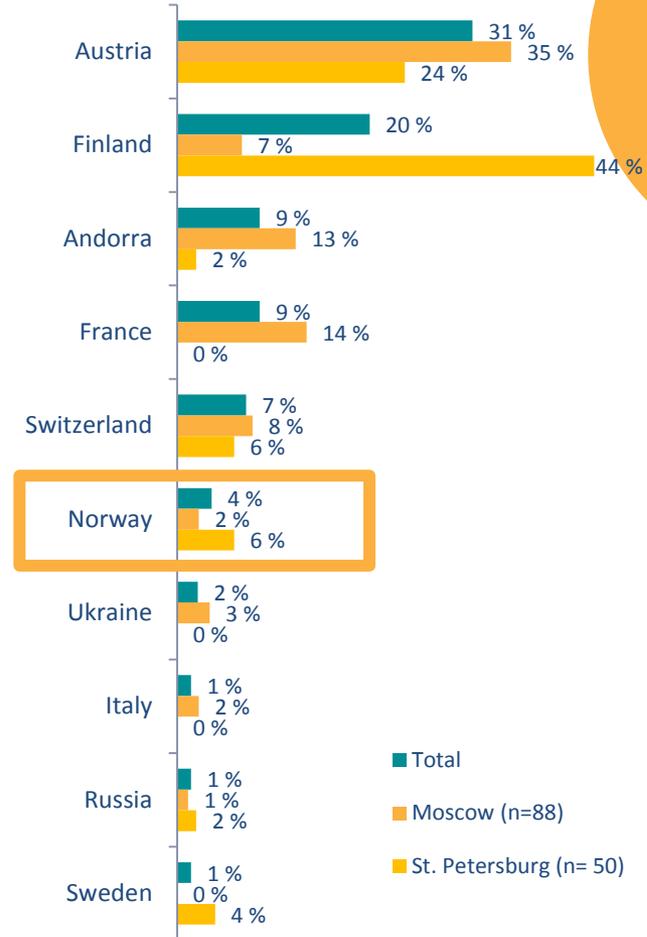
- Dominated by people aged 30-39 (33%)
- Slightly more relevant for men (54%)
- High education
- 27% of the travelers have a household income of 50.000 Euros or more. 4% makes 100.000 Euro's per year or more

WHEN do they travel?



Average length of stay: 8 days

WHERE do they travel?



HOW do they travel?

ACCOMODATION

- Hotel medium standard
- More rented or borrowed cabin / holiday home / flat in St. Petersburg (35%) than in Moscow (15%)
- More hotel high standard in Moscow (15%) than in St. Petersburg (4%)

TRAVEL TO DESTINATION

- Dominated by car
- Scheduled plane

WITH WHOM

- Friends (44%)
- Spouse/partner (41%)
- Any children (16%)
- Other family/relatives (15%)

PLANNING & ORGANISATION

- Mostly organized individually



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

WHY

do they travel?

EMOTIONAL BENEFITS

- Helps me enjoy life to the fullest
- Allows me to share good times with others
 - Makes me feel full of energy
- Helps me escape from my hectic daily life
- Restores my sense of harmony and balance

PERSONALITY

- **Contemporary**
 - Outgoing
 - Sociable
 - Authentic

WHAT

are they looking for?

DESTINATION FEATURES

- Has beautiful nature
- **Has attractive mountain areas**
- **Allows me to be physical active**
 - Is safe
 - Has good service

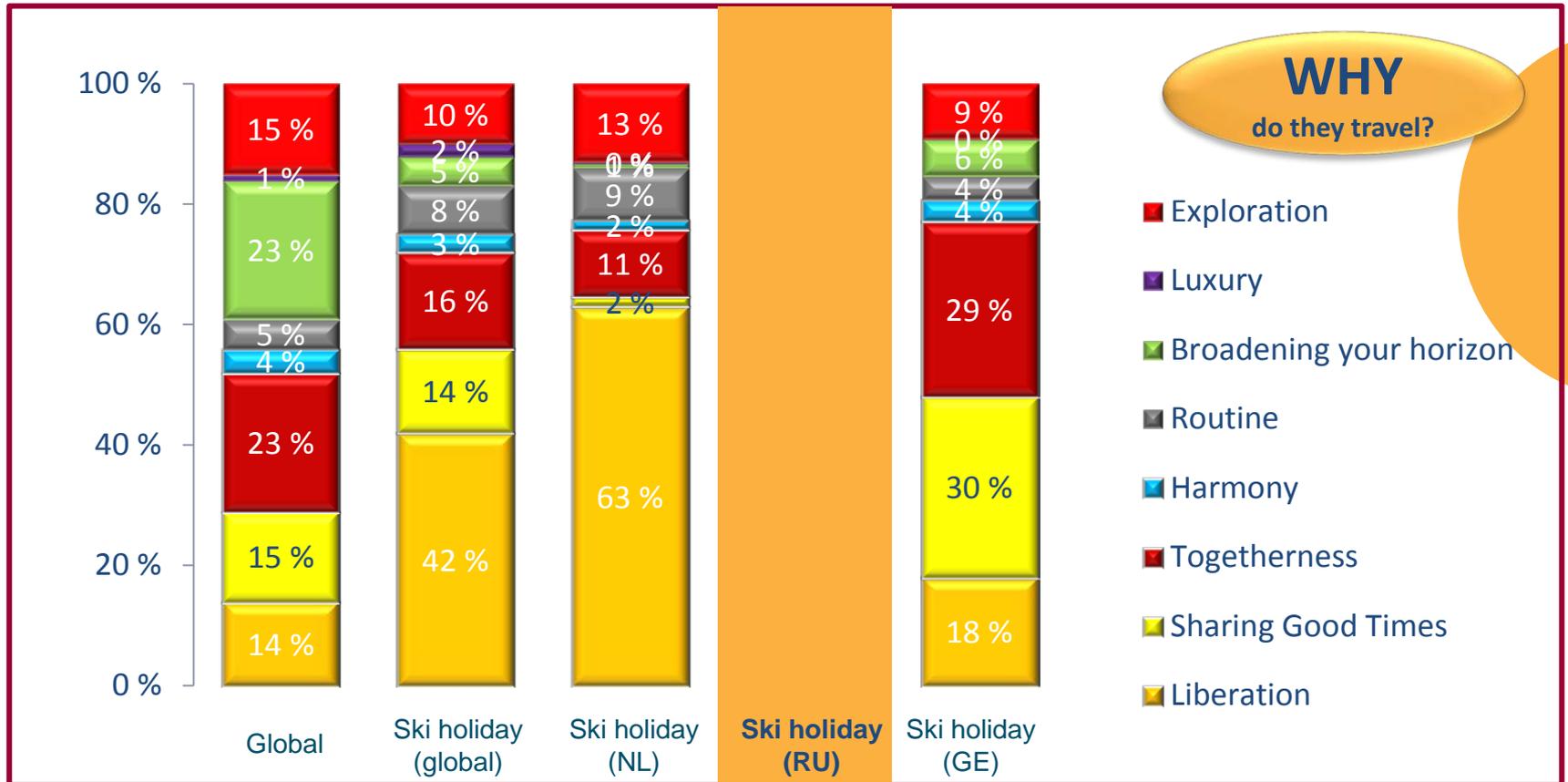
ACTIVITIES

- **Experience mountains**
- **Alpine skiing/snowboarding**
 - Observe beauty of nature
 - Taste local food and drink
- **Do winter activities (dog-sleigh, snowmobile etc.)**

Slide shows most important items

Bold = differentiating from other holiday types

Why do Russians go on a ski holiday?



CONCLUSION:

Liberation is the dominant motivation to go skiing. Other relevant motivations are Togetherness, Sharing Good times and Exploration. In Russia Sharing Good Times and Togetherness are the most relevant segments.

Ski holiday

Recommended target motivation



Liberation

Freeing yourself completely of all daily hassles

Why?

- Most important segment overall
- Leading motivation in Russia
- Market leader Austria is relatively the weakest in this motivation

Key competition

- Austria
- Finland
- Switzerland
- France

Leveraging brand Norway

- Experiencing mountains
- Attractive scenery that allows to feel completely liberated, far away from daily hassle
- Observing the beauty of nature

NOTE: For St. Petersburg it would make sense to also focus on Sharing Good Times.

Sightseeing/roundtrip – Russian tourists

N= 731



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

WHO

travels

DEMOGRAPHICS

- Dominated by 30-39 (37%)
- More female (61%) than male (39%)
- High education
- 10% of the travelers have a household income of 50.000 Euros or more. 2% makes 100.000 Euro's per year or more.

WHEN

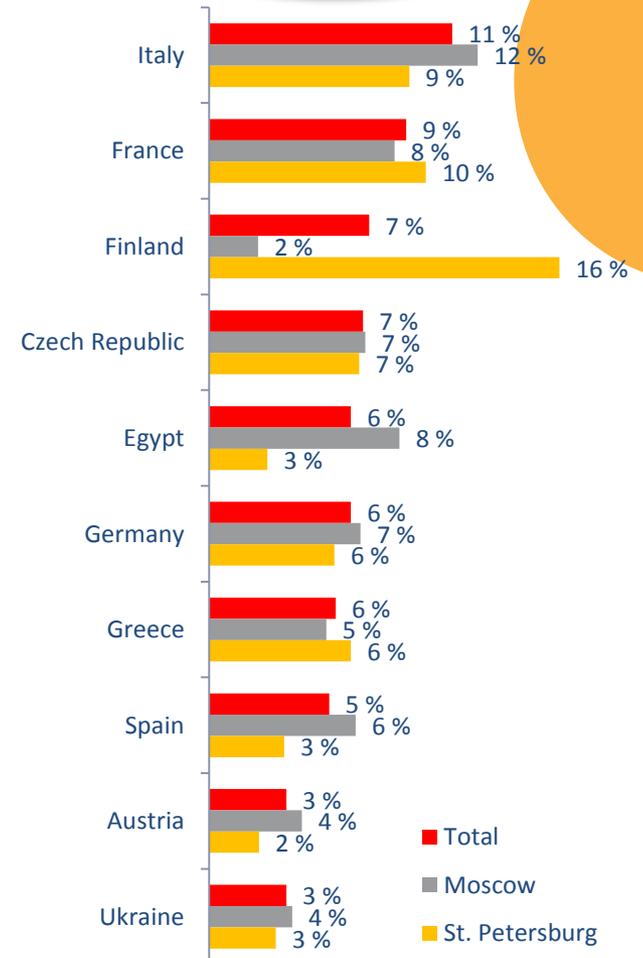
do they travel?



Average length of stay: 12 days

WHERE

do they travel?



HOW

do they travel?

ACCOMODATION

- Almost exclusively hotels
- Mostly medium prized

TRAVEL TO DESTINATION

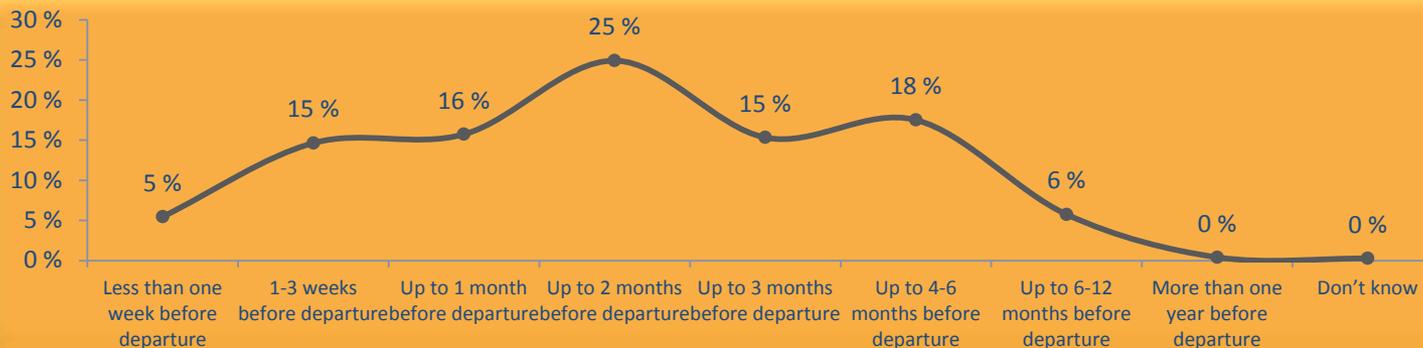
- Dominated by plane
 - Bus
 - Car

WITH WHOM

- More with spouse/partner (51%)
 - Friends (22%)
 - Less with children

PLANNING & ORGANISATION

- More **organized tours**
- Also often organized on their own



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

WHY

do they travel?

EMOTIONAL BENEFITS

- Allows me to discover new and interesting places
 - Allows me to broaden my horizon
- **Allows me to broaden my knowledge**
 - Enriches my view on the world
 - Helps me to enjoy life to the fullest

PERSONALITY

- **Cultivated**
- **Explorative**
 - Friendly
- Open-minded
 - Active

WHAT

are they looking for?

DESTINATION FEATURES

- **Has interesting sights**
- **Has interesting culture & art**
 - Has good service
- **Has rich cultural heritage**
 - Is safe

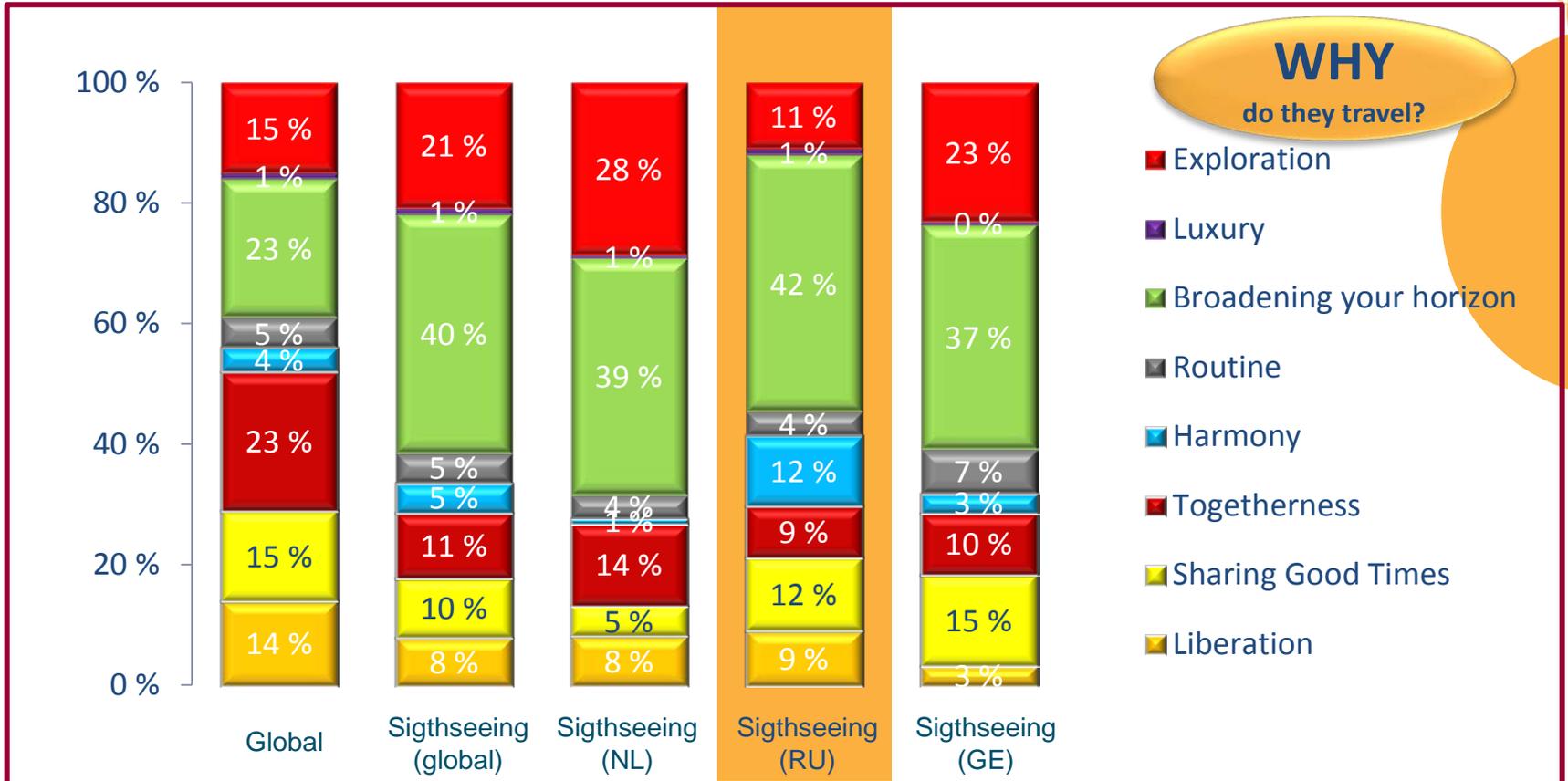
ACTIVITIES

- **Attend sightseeing tours**
- **Visit historical buildings/sites**
 - Taste local food and drink
 - **Visit museums**
- Discover local history and legends

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a sightseeing/roundtrip?



CONCLUSION:

Broadening your horizon is the dominant motivation for sightseeing. Other relevant motivations are Exploration and Sharing Good times. Broadening your horizon dominates in all markets.

Sightseeing/roundtrip

Recommended target motivation



Becoming more knowledgeable

Broadening your Horizon

Why?

- By far most important segment (across all markets)
- Although Norway currently lacks the perception, the content does exist in cities like Oslo, Bergen and the Vikings, polar history etc.

Key competition

- Italy
- France
- Finland
- Czech Republic
- Unique, one-off destinations/historical sites ('checking off the list')

Leveraging brand Norway

- Nature can be part of a Broaden your Horizon sightseeing tour, but should be complimented with culture, museums, architecture, local life, local legends and history, etc.
- Is largely about activating what is already there.
- Important to **have organized tours**, certainly because with the scale that Norway has (c.f. Finland)

NOTE: consider extending target to Exploration, as there is quite a lot of overlap between the experience that people look for when sightseeing.

City trip/city break – Russian tourists

N= 190



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

WHO

travels

DEMOGRAPHICS

- Dominated by people aged 30-39 (34%)
- People 18-39 years constitutes 75% of the travelers
- Higher education
- Slightly more females (57%)
- 14% of the travelers have a household income of 50.000 Euros or more. 6% makes 100.000 Euro's per year or more

WHEN

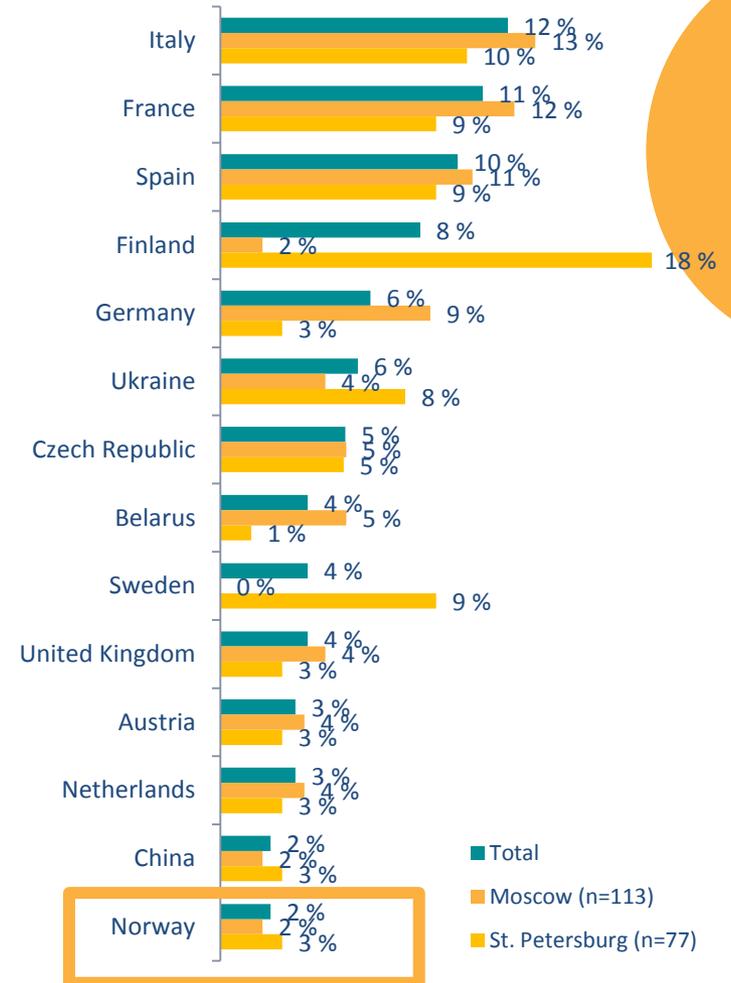
do they travel?



Average length of stay: 8 days

WHERE

do they travel?



HOW do they travel?

ACCOMODATION

- Hotel accommodation 75% share (medium standard 48%)

TRAVEL TO DESTINATION

- Dominated by scheduled plane
 - Car

WITH WHOM

- Spouse/partner (49%)
 - Friends (28%)

PLANNING & ORGANISATION

- Mostly self organized



WHY

do they travel?

EMOTIONAL BENEFITS

- Allows me to broaden my horizon
- Allows me to discover new and interesting places
 - Allows me to broaden my knowledge
 - Enriches my view on the world
 - Allows me to pamper myself

PERSONALITY

- Friendly
- Harmonious
- **Cultivated**
- Open-minded
- **Contemporary**

WHAT

are they looking for?

DESTINATION FEATURES

- Has interesting sights
 - Has good service
- Has good local cuisine
 - Is safe
- **Has interesting culture & art**

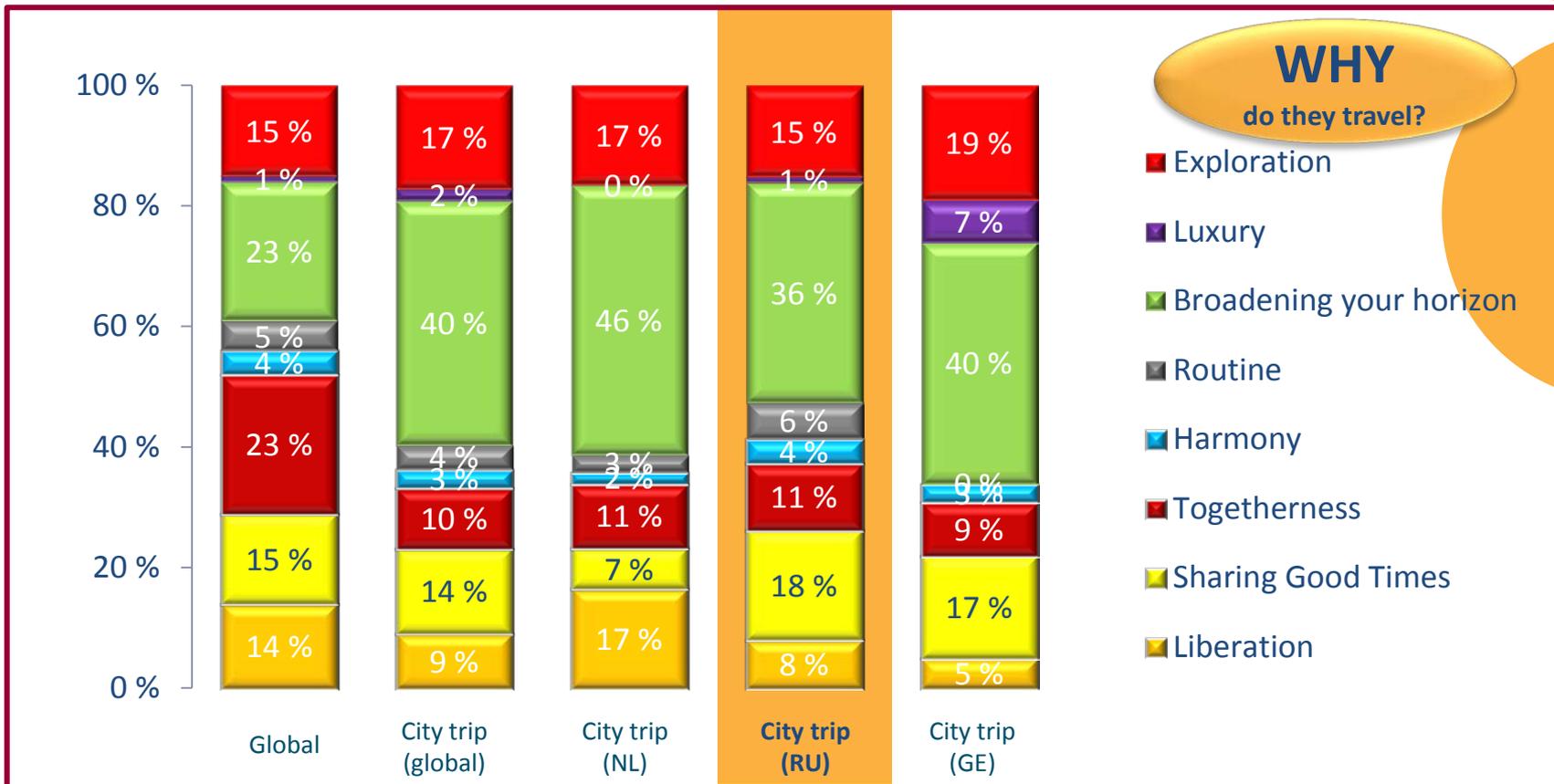
ACTIVITIES

- **Visit cities**
- **Visit historical buildings/sites**
- Taste local food and drink
- **Experience local architecture**
 - Attend sightseeing tours

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a City trip/city break?



CONCLUSION:

Broadening your horizon is by far the main motivation. Other motivations are Exploration and sharing good times. The same is the case for all markets, except for Netherlands where Sharing good times has a lower share.

City trip/break

Recommended target motivation



Becoming more knowledgeable

Broadening your Horizon

Why?

- By far most important segment (across all markets)
- Compact, clean and interesting cities such as Oslo and Bergen have a lot to offer

Key competition

- Finland
- Sweden
- France
- Italy
- Spain
- Germany
- Ukraine
- Other European cities that are relatively easy to travel to

Leveraging brand Norway

- Like for sightseeing is largely about activating what is already there.
- A lot of choice in activities
- Need for authentic, budget accommodation (e.g. stimulate B&B, “design cheap”)
- Leverage nature (e.g. daytrip outside Oslo)
- Seasonal offer (e.g. Christmas experience in December)

Holiday to experience nature – Russian tourists

N= 89



- 5W profile
- Motivations for Holiday to experience nature
- Role of Norway versus competitive landscape
 - destination versus motivation within Holiday to experience nature
 - Who is coming today?
- Exploration of possible target segments
- Leveraging the Norway brand for Holiday to experience nature

WHO

travels

DEMOGRAPHICS

- Dominated by people aged 30-49 (58%)
- People 18-49 years constitutes 90% of the travelers
- Higher education (71%)
- Slightly more males (57%)
- 10% of the travelers have a household income of 50.000 Euros or more. 2% makes 100.000 Euro's per year or more

WHEN

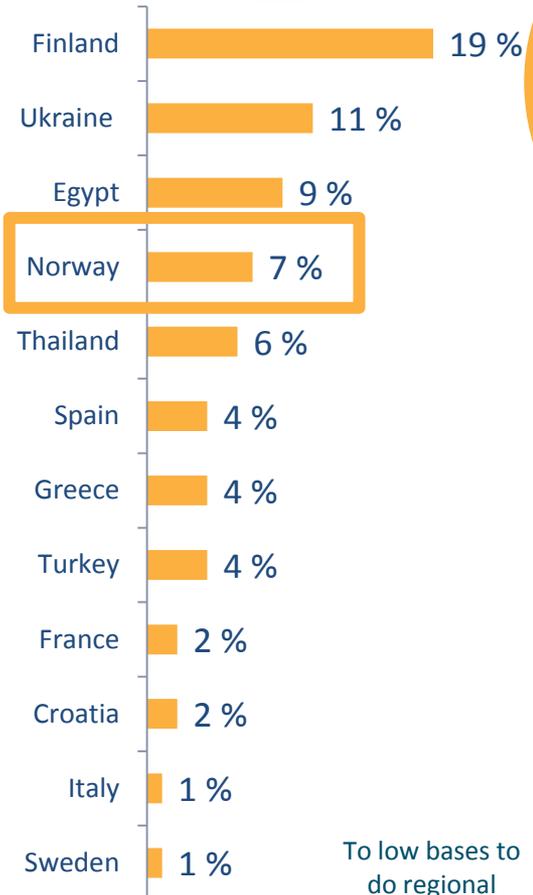
do they travel?



Average length of stay: 14 days

WHERE

do they travel?



To low bases to do regional breakdowns. N= 89

HOW

do they travel?

ACCOMODATION

- Hotel (medium standard)
- Rented or borrowed cabin / holiday home / flat
- More hotel high standard in Moscow (26%) than in St. Petersburg (11%)

TRAVEL TO DESTINATION

- Dominated by plane
- Car

WITH WHOM

- Spouse/partner (64%)
 - Friends (34%)

PLANNING & ORGANISATION

- Mostly self organized



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

WHY

do they travel?

EMOTIONAL BENEFITS

- Allows me to discover new and interesting places
 - Allows me to broaden my horizon
- Helps me escape for my hectic daily life
- Helps me to enjoy life to the fullest
 - Enriches my view on the world

PERSONALITY

- Friendly
- Harmonious
 - Cozy
- **Soothing**
- Active

WHAT

are they looking for?

DESTINATION FEATURES

- Has beautiful nature
- **Has nature that offers opportunities for discovery**
 - Has good local cuisine
- **Has unspoiled nature**
- **Allows me to live close to nature**

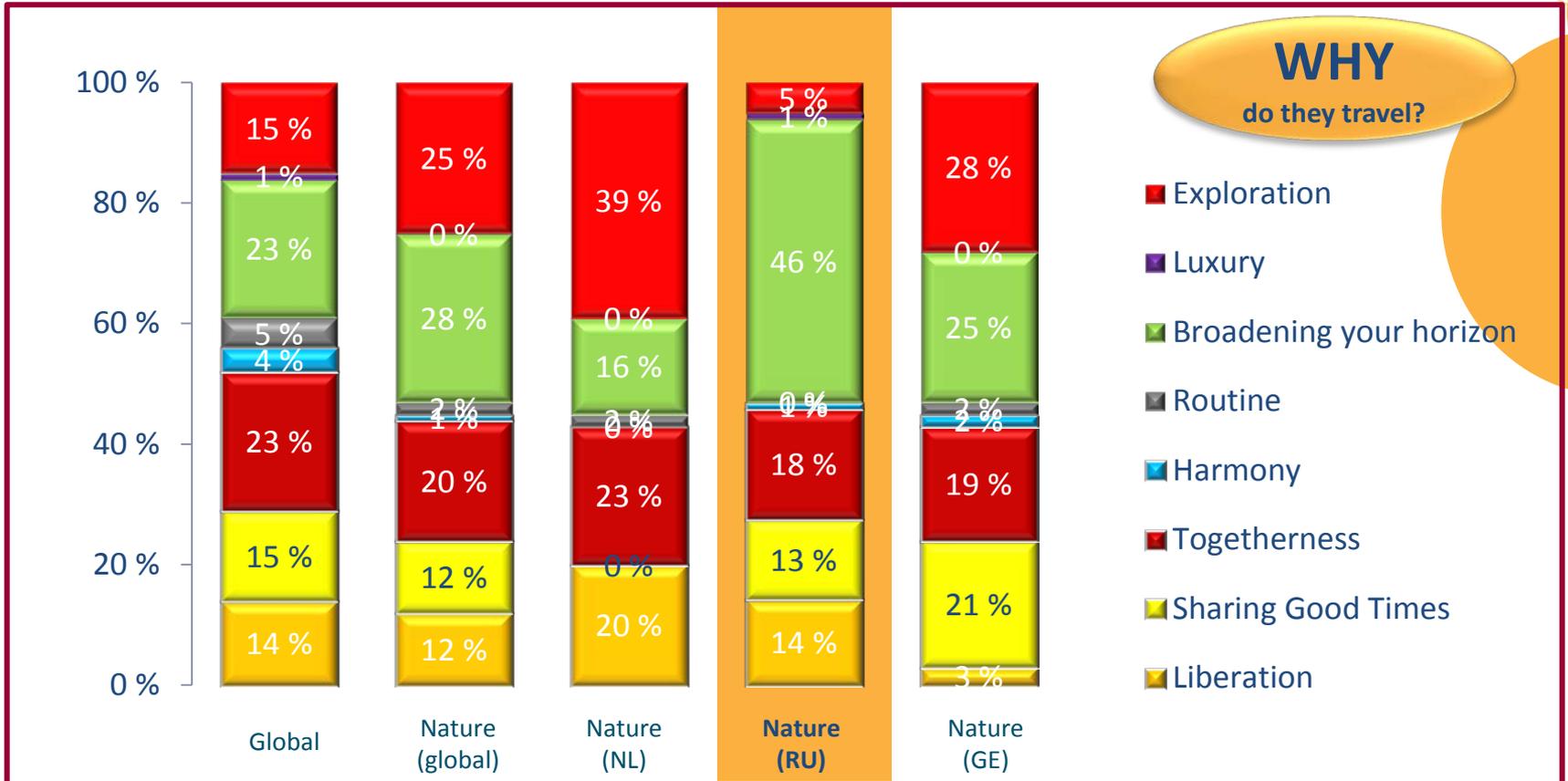
ACTIVITIES

- Observe beauty of nature
- **Experience wildlife**
 - Relaxation
- Taste local food and drink
- **Visit national parks**

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a Holiday to experience nature?



CONCLUSION:

Broadening your horizon in Russia than in the other markets, togetherness is the other important segment.

Experience Nature

Recommended target motivation

Broadening your horizon with a hint of "Exploration"



Chasing rich experiences

Exploration



Becoming more knowledgeable

Broadening your Horizon

Why?

- Broadening your Horizon is the most important motivation in Russia.
- Exploration is at the heart of what Norway stands for
- The Russians go on holiday to explore

Key competition

- Close to home destinations
- Finland
- Ukraine
- Egypt

Leveraging brand Norway

- Build on perceptual strengths of Norway
- Make sure to really engage the visitor, should be very engaging experience
- Really experiencing the great outdoors, not just visiting/passing by
- Discovering unique, unspoiled places
- Can be a bit more expensive if perceived to deliver real value
- Enrichment is the key

Cottage holiday – Russian tourists

N= 76



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

WHO

travels

DEMOGRAPHICS

- Dominated by people aged 25-49 (78%)
- Higher education (79%)
- Slightly more females (58%)
- 5% of the travelers have a household income of 50.000 Euros or more. No one makes 100.000 Euro's per year or more

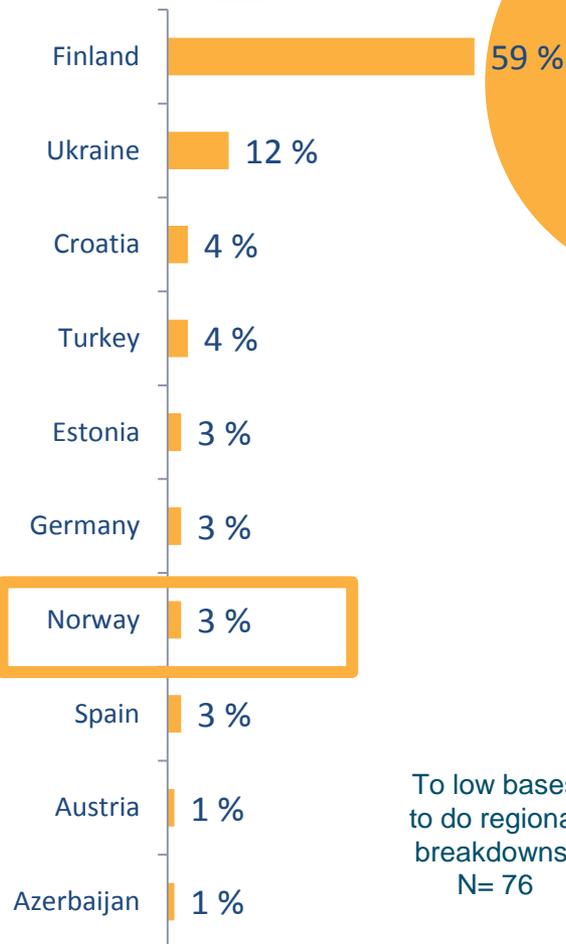
WHEN

do they travel?



WHERE

do they travel?



To low bases
to do regional
breakdowns.
N= 76

HOW do they travel?

ACCOMODATION

- Rented or borrowed cabin / holiday home / flat

TRAVEL TO DESTINATION

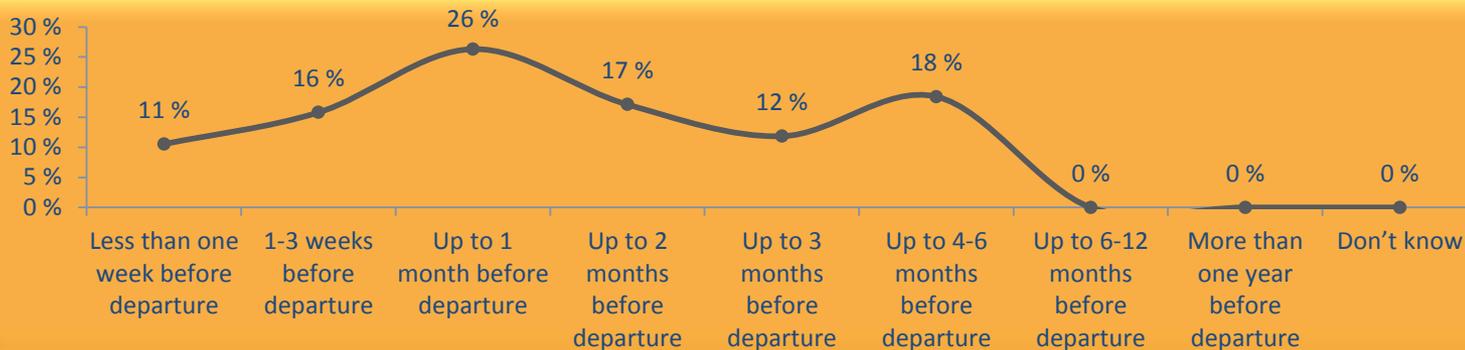
- Dominated by car (72%)
→ people from St. Petersburg going to Finland.

WITH WHOM

- Spouse/partner (58%)
- Also relatively similar shares of children 0-14 (37%)
- Other family/relatives (22%) and friends (38%)

PLANNING & ORGANISATION

- Almost exclusively organized by themselves



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

WHY

do they travel?

EMOTIONAL BENEFITS

- Helps me enjoy life to the fullest
- Helps me to escape from my hectic daily life
- Restores my sense of harmony and balance
 - Gives me a safe feeling
 - Makes me full of energy

PERSONALITY

- Harmonious
- **Soothing**
- **Peaceful**
 - Cozy
- **Relaxed**

WHAT

are they looking for?

DESTINATION FEATURES

- Has beautiful nature
- Has quiet environments
 - Is easy to travel to
 - Is safe
- Has friendly people

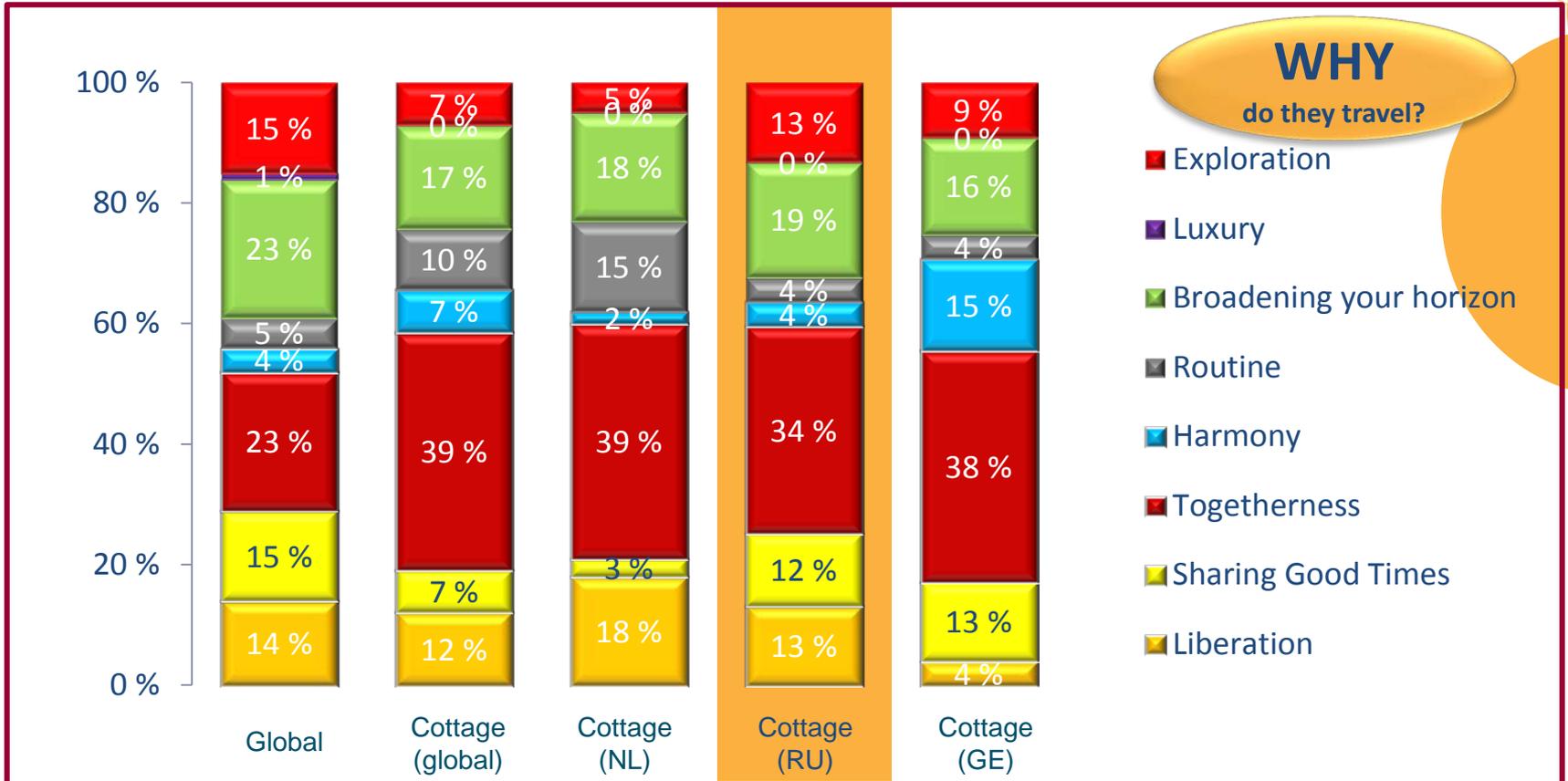
ACTIVITIES

- **Relaxation**
- Observe beauty of nature
- Hiking (less than two hours)
- Taste local food and drink
 - Experience wildlife

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a Cottage?



CONCLUSION

Togetherness dominates as motivation. Broadening your horizon and Exploration/Liberation follows. Some differences in the markets.

Cottage

Recommended target motivation



Togetherness

Strengthening family ties

Why?

- Main motivation in Russia
- It's possible to add a flavor of Exploration and Broadening your horizon as well

Key competition

- Finland
- Ukraine
- **PROXIMITY IS KEY**

Leveraging brand Norway

- Living close to nature, getting away from everything
- Importance of family-friendly activities



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