



### Report for the Dutch market

August 2012

Basic motivations for going on holiday Needs based segmentation - Censydiam





**Developed for:** Innovation Norway





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#### **Executive summary - Background**

- 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 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 across the three markets
  - ⇒ 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.
- Across the three markets, Norway is mostly associated in two motivational segments:
  - - 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 in the Netherlands
  - Emotional benefits associated with Norway; 'Allows me to discover new and interesting places', 'Helps me to escape from my hectic daily life', 'Gives me rich experiences', 'Allows me to broaden my horizon' and 'Enriches my view of the world'
  - ⇒ Personality associated with Norway: 'Adventurous', 'Peaceful', 'Fresh' and 'Soothing'
  - Destination features associated with Norway: 'Has beautiful nature', 'Has nature that offers opportunities for discovery', 'Is not too warm', 'Has unspoiled nature' and 'Has quiet environments'
  - ⇒ Activities associated with Norway: 'Observe beauty of nature', 'Observe natural phenomenon', 'Experience mountains', 'Hiking (more than two hours)', 'Hiking (less than two hours)'

- 24% of the Dutch in the sample have visited Norway, which is lower than for Sweden and Denmark.
- However Norway is the most frequently considered Scandinavian holiday destination in The Netherlands. This demonstrates that Norway has unrealised potential.
- 32% of the Dutch 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 does not 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
  - ⇒ In the Netherlands, Norway is best positioned with Exploration
  - ⇒ But the strength of this association is relatively weak



### 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?

  Ipsos MMI

#### Evaluate / Confirm current direction for Norway

#### **Cross-country**

Germany

Russia

▼ The Netherlands

#### Choose target for each holiday type

Skiing

Sightseeing/roundtrip

City trip/city break

Camping

Experience nature

Cottage

Active holiday

# We have created qualitative hypothesis

four focus groups in each country

# We have validated them quantitatively

1,200 interviews online in each country

#### Who did we speak to:

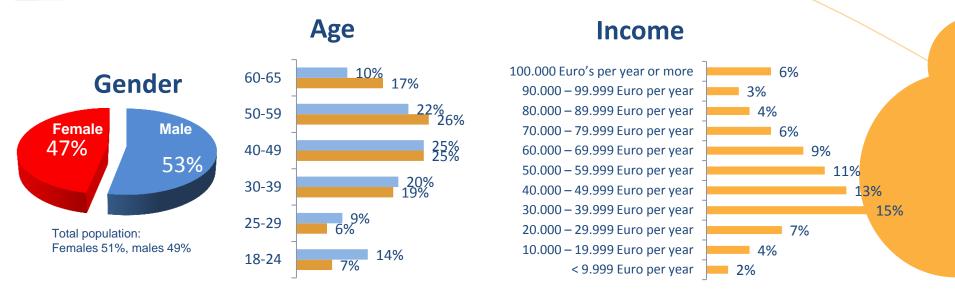
To be included in the study, the respondent had to have been on a holiday abroad that included at least three overnight stays during the past 24 months, and where the trip was <u>not</u> paid for by their employer.

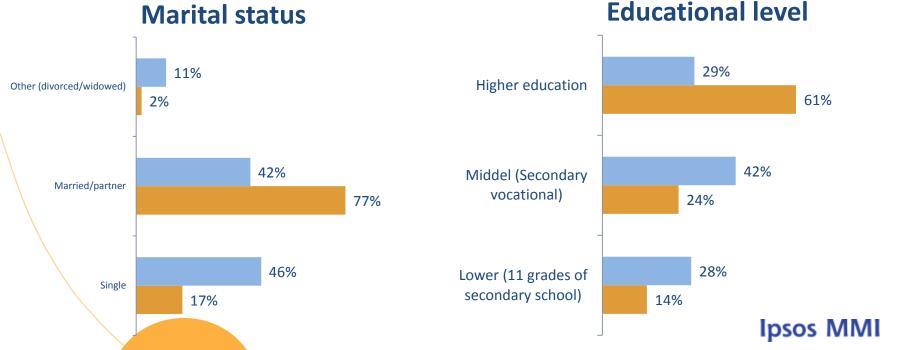
The respondent also had to be interested in going on holidays to experience either; dramatic, wild nature and beautiful scenery, or outdoor activities, e.g. skiing, hiking or cycling, or clean and unspoiled nature, or local art, culture and lifestyle.

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







### 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...



The Censydiam model

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

Enjoy to the fullest Impulsive

Controlled Planned

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

Individual performance

Personal enrichment

Social Be part of something Mental relaxation

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?



#### **Background to the project**

- Why do people travel?

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' decisionmaking 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'?



# 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



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 intructional video, please visit our website at: <a href="http://w3.ipsos.com/marketing/censydiam/">http://w3.ipsos.com/marketing/censydiam/</a>



#### What do we ask about?

Actual holidays\*

**Ideal holidays** 

Perception of Norway

#### What answers can that give us?

-How is Norway **positioned** as a holiday destination?

-The **competitive landscape** (Norway vs. other countries)

-What an **ideal holiday** looks like

-How Norway should be **<u>positioned</u>** (in relation to communication, products and service provision)

-Gaps where **Norway has weaknesses** either in people's **perception** of Norway or in relation to their actual holiday **experiences** 

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



The ideal holiday

#### Can be explained by four different factors





#### **Explanation of the four factors of an ideal holiday**

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 bevaviour 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 <u>emotional benefits sought</u> and the <u>personality</u> of the <u>ideal holiday</u> on a given occasion.



# 2. Fundamental meaning



- The holiday market in The Netherlands.
- Fundamental meaning of going on holiday.
- Segments
- Assessment of Norway



# We start with cultural context because it is vital for understanding and communicating with the Dutch 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 Dutch 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).

Source: Qualitative focus groups



#### Calvinist Culture: Understatement is the Norm

- The Dutch culture is historically based on Calvinistic principles. These are the strongest in the countryside of the Netherlands. This has implications for everyday life...
  - ⇒ **Don't show off** your success, status or money
  - ⇒ The Dutch tend to live **modestly** and are level-headed
  - ⇒ Are thrifty and have a reserved attitude
  - □ They are not used to expressing their emotions in public
  - Income is not a subject of conversation
  - ⇒ Welfare state: the government has a big influence on our norms and values.
  - ⇒ Don't spend money if you haven't got any (use of credit card is not very common in everyday life)
  - A lot of **rituals** (e.g. dinnertime is set, drinking coffee at set times), less impulsive behavior
  - ⇒ The Calvinistic (normative) nature also comes up when women go back to work (part-time):
    - Women feeling guilty about working part-time instead of full-time, as they think they need to work more to do their job even better.
    - Women feeling guilty towards their child(ren) about working (even if they are working part-time) and thus about not being able to spend a lot of time with them.



#### **An Orderly Society**

- Clarity and organization is extremely important to the Dutch. In case you don't know where to go, just look around you and a signpost will tell you!
- The Dutch want things to be well arranged and well structured.
- And the people? They schedule almost every daily event in their calendars. Their days are well-structured, the Dutch are very **punctual**. Don't be late! Nine o'clock means 9.00, not 9.15!!









#### At times need to cut loose:

- Exuberant and expressive side to Dutch Culture
- National ( +/- organised) celebrations
- Need to release rigidity of Dutch society









#### **Big Idea: Progressive and Proud**

- The Dutch are very **proud** of being Dutch and of their identity. They like talking about their country, their traditions, their language, their habits et cetera. They have a very rich history as navigators, merchants, explorers, and farmers. Much of the beauty of the country is a heritage of all this.
- Progressiveness and tolerance are characteristic aspects of Dutch culture and most Dutch people. Things which some countries look at with anxiety are completely integrated in The Netherlands. We feel special because of this. A few well-known examples are the way soft drugs (marihuana) are tolerated, and the way the Dutch deal with gay marriage and euthanasia.
- The Dutch are fiercely egalitarian in their values and don't accept hierarchy. They will always discuss a statement even if it is from someone who holds a higher position; things are not easily accepted.









## General perspective of the role of holidays in the Dutch culture

#### Time spent; working vs. leisure...

- The Dutch are hard, efficient workers and want to earn an honest and fair living, but also value their leisure time: relatively short but highly productive working weeks.
- A lot of part-time workers (often mothers), as working part-time is a legal right in The Netherlands.
- Going on a holiday (abroad) is important, a claimed right (i.e. three weeks in summer).
- Next to the summer holiday, most people also go on a shorter holiday in spring (e.g. winter sports in Austria, France or Switzerland), or on city trips during the year.
- Children have a major influence on choosing a holiday destination when they are involved. Their happiness is most important in choosing a holiday as this ensures the relaxation Dutch people are looking for within a holiday.



## General perspective of the role of holidays in the Dutch culture

- Within travelling abroad the Dutch history of navigation, merchants and explorers is rooted in most of us. Everywhere around the world Dutch people can be found. There hardly seems to be a place where you don't run into the Dutch.
- Respondents typify this as curiosity, the need for exploration, the need for variation of daily life and surrounding.
- The respondents feel there has been a change in travelling abroad. Where holidays and trips used to be an exception and merely situated in the Netherlands itself, it slowly progressed to holidays/trips abroad in Europe. Nowadays however there is also a focus on exploring the unknown world and experience the most unusual (and far) places. But this is even less special than it used to be.
- Besides that, there is a shift from more fixed times to go on holidays to times that fit your wants and needs (when possible with children and work).



## General perspective of the role of holidays in the Dutch culture

#### **Key insight from qualitative**

It seems especially important for the Dutch to get away from the typical Dutch society that is so structured, stressed, full of rules and demands. Other cultures and a different surrounding gives them the opportunity to free themselves and get reloaded.



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

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

Source: Qualitative focus groups and quantitative survey



What Durch tourists want in general when they go on holiday
Irrespective of segments or types of holiday, there are some factors that are
on the top of Dutch tourists' expectation lists for their ideal holiday

### **EMOTIONAL BENEFITS**

- Helps me escape from my hectic life
- Allows me to discover new and interesting places
  - Allows me to share good times with others
    - Helps me live life to the fullest
      - Gives me rich experiences

# WHY

are they travelling

## **PERSONALITY**

- Relaxed
- Friendly
- Active
- Soothing
- Peaceful

# WHAT

are they looking for?

## **PRODUCT CHARACTERISTICS**

- Has beautiful nature
- Is easy to travel to
- Has interesting sights
- Has friendly people
  - Is safe

## **ACTIVITIES**

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

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

**Ipsos MMI** 



What Dutch tourists want in general when they go on holiday
Irrespective of segments or types of holiday, there are some factors that are
on the top of Ducth tourists' expectation lists for their ideal holiday

## **ACCOMODATION**

- Hotel medium standard (28%)
  - Cabin/holiday home (27%)
  - · Hotel high standard (12%)

## TRAVEL TO DESTINATION

- Car (60%)
- Scheduled plane (23%)
- Chartered planed (12%)
  - Bus (10%)

# HOW

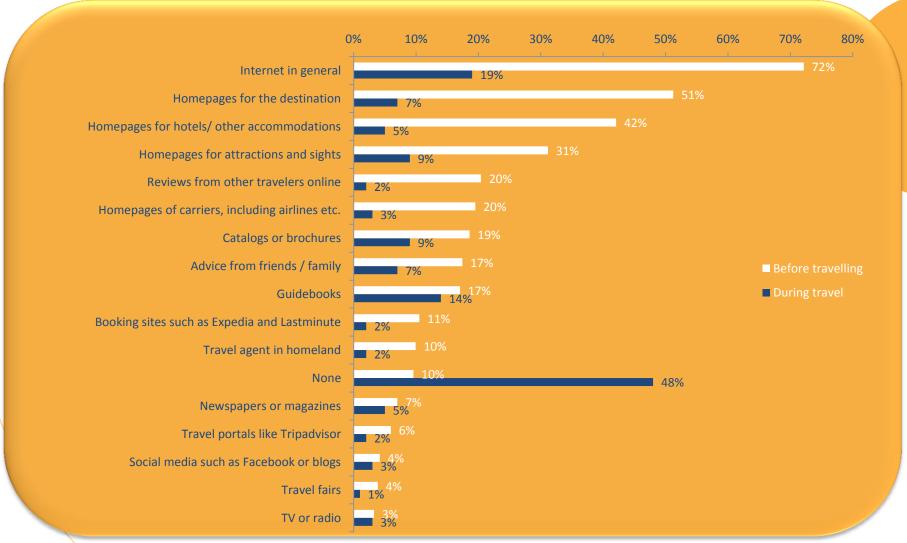
do they travel







What information sources Dutch 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





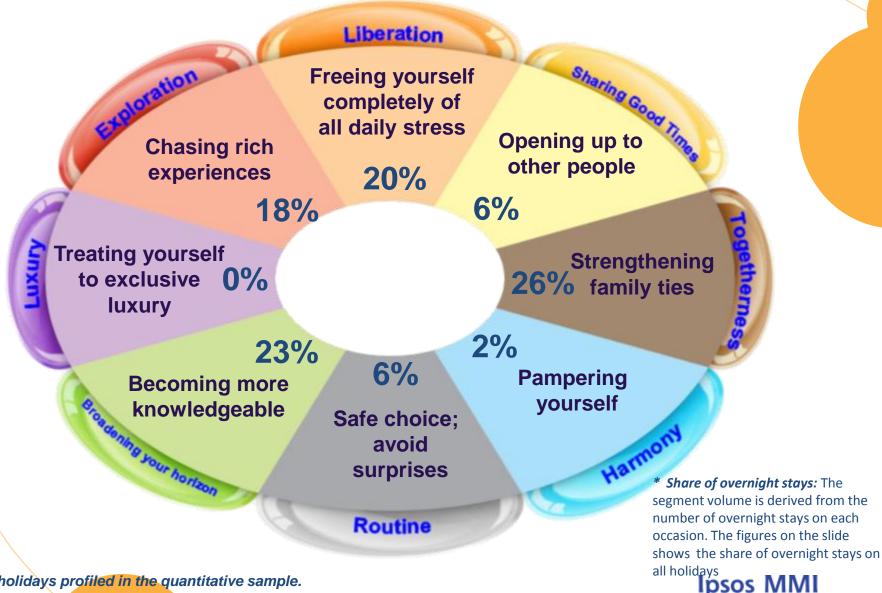
# 3. The segments





All the holidays reported in the Dutch sample

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



n = all holidays profiled in the quantitative sample.



# Segment share by market

- All three countries – all types of holiday



n = all holidays profiled in the quantitative sample (for each country).

Ipsos MMI

# Summary of the segments

- Gives me rich experiences
- Discover new and interesting places
- Escape from my hectic daily
- · 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

Liberation

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

Share good times

Meet new people

Discover new and

interesting places

Escape from my hectic

local culture

daily life

· Immerse myself in the

**Emotional benefits** 

**Personality** 

Relaxed

Friendly

Soothing

Peaceful

Cozy

- Active
- Relaxed Friendly
- Fresh
- Soothing

- Sociable
- Sharing Rood Time Outgoing
- Friendly
- Relaxed
- Cozy

- 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

#### Adventurous

- Explorative
- Unique
- Active
- Friendly

#### Luxurious

- Classy
- Extravagant
- Superior
- Indulgent

- Authentic
- Open-minded
- Relaxed
- Cultivated Saur horizon

#### Predictable

- Practical
- Structured
- Relaxed
- Friendly

#### Cultivated

- Contemporary
- Caring
- Friendly
- Relaxed

#### Discover new and interesting places

Indulge in a bit of

· Feel on top of the

Show my superior

**luxury** 

world

lifestyle

Feel special

Shows that I am

successful in life

- Broaden my horizon
- · Broaden my knowledge · Enrich my view of the
- Rich experiences

world

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

- 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 difestyle
- Visit restaurants

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

Relaxation

and drink

Taste local food

Visit restaurants

sightseeing tours

nature

Attend

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

#### **Destination features**

#### **Activities**

- Observe beauty of Taste local
  - food and drink
  - Visit restaurants o
  - 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)

- people
- Has beautiful nature

Has friendly

- 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 Has interesting sights
- - Discover local culture and lifestyle Sysur horizon
- Relaxation
  - Visit restaurants
  - Taste local food and drink
  - Visit cities
  - Observe beauty of nature
- Taste local food and drink

Ha

- Visit restaurants
- Relaxation
- Shopping
- Visit cities

#### 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

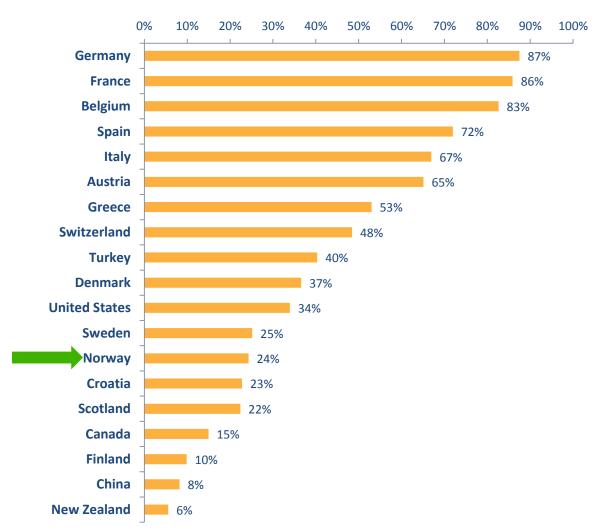




# Where do The Dutch go?

24% of The Dutch have ever visited Norway, which is on a par with Sweden but lower than Denmark.

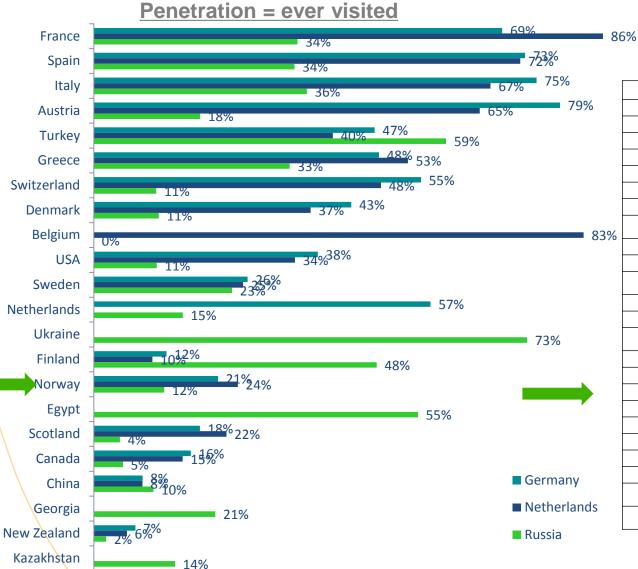
# **Penetration = ever visited**





## Norway as a tourist destination – Accross the three countries

# More German and Dutch people have visited Norway than Russians



Repeat visits (twice or more...)

| Repeat visits (twice of more) |                           |     |                   |     |  |  |
|-------------------------------|---------------------------|-----|-------------------|-----|--|--|
|                               | Total Germany Netherlands |     | Russia            |     |  |  |
| France                        | 71%                       | 63% | 8 <mark>5%</mark> | 37% |  |  |
| Spain                         | 71%                       | 82% | 73%               | 37% |  |  |
| Italy                         | 64%                       | 75% | 65%               | 34% |  |  |
| Austria                       | 70%                       | 78% | 69%               | 27% |  |  |
| Turkey                        | 56%                       | 62% | 48%               | 59% |  |  |
| Greece                        | 51%                       | 54% | 5 <mark>6%</mark> | 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% |  |  |

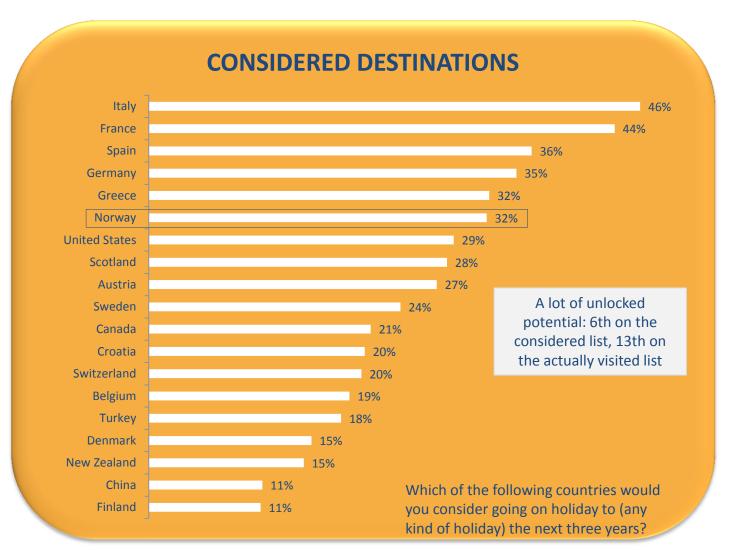
Average accross all holidays in the three countries: 53%

**Ipsos MMI** 



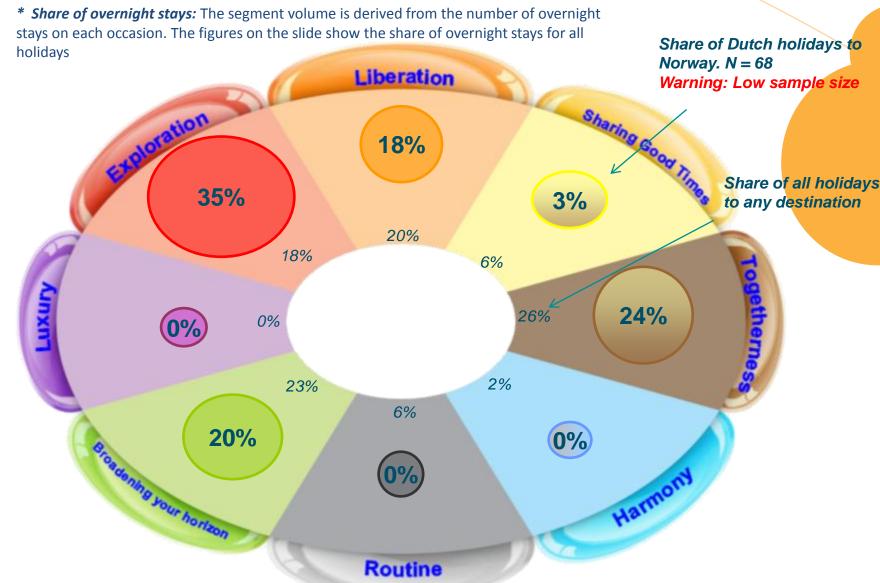
#### Considered destinations in Holland

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





# Dutch holidays to Norway + all holidays to any destination from Holland The size\* of each segment



Source: Dutch holidays to Norway. N = 72 Warning: Low sample size! Source: All holidays to any destination in the quantitative sample



# SUMMARY OF SCORECARD FOR NORWAY: The Dutch' perception of Norway as a holiday destination

## **WHAT**

are Norway perceived as?

## **DESTINATION FEATURES**

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

## **ACTIVITIES**

- Observe the beauty of nature
- Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves etc)
  - Experience mountains
  - Hiking (more than two hours)
  - · Hiking (less than two hours)

# **EMOTIONAL BENEFITS**

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

## WHY

go to Norway

# **PERSONALITY**

- Adventurous
  - Active
  - Peaceful
  - Soothing
    - Fresh



# Scorecard Norway, actual figures: The Dutch 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=1180)   | %    | Index |
| Allows me to discover new and interesting places | 62,8 | 110   |
| Helps me to escape from my hectic daily life     | 58,4 | 113   |
| Gives me rich experiences                        | 51,3 | 104   |
| Allows me to broaden my horizon                  | 46,6 | 104   |
| Enriches my view on the world                    | 46,4 | 99    |
|  |      |       |

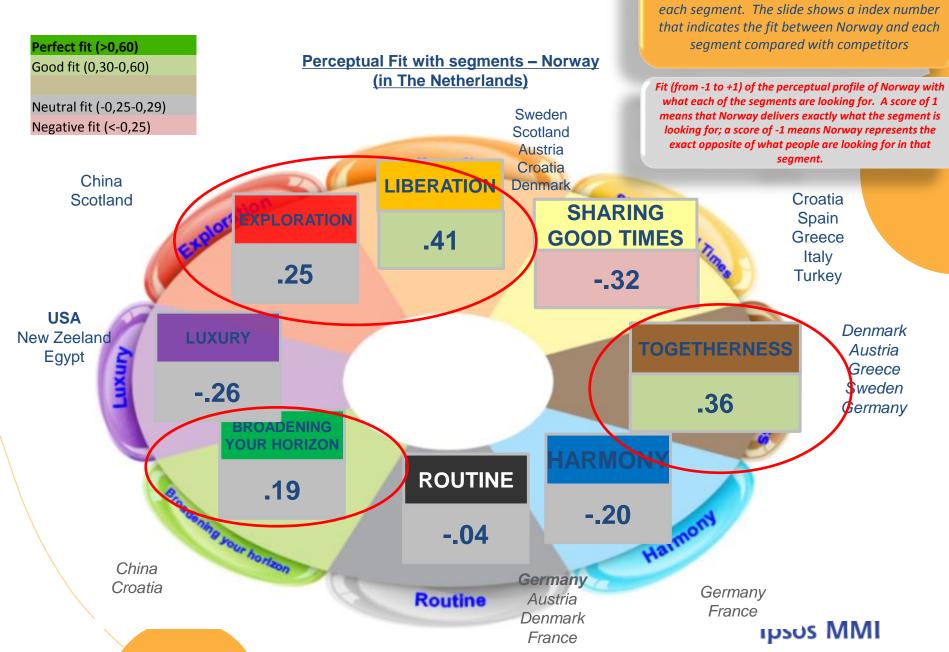
| Personality |      |       |
|-------------|------|-------|
| (n=1180)    | %    | Index |
| Adventurous | 59,8 | 124   |
| Active      | 58,9 | 126   |
| Peaceful    | 56,2 | 136   |
| Soothing    | 51,6 | 139   |
| Fresh       | 51,2 | 174   |

| Destination features                     |      |       |
|--|------|-------|
| (n=1180)                                 | %    | Index |
| Has beautiful nature                     | 87,2 | 124   |
| Has unspoiled nature                     | 85,6 | 143   |
| Has nature that offers opportunities for | 83,1 | 138   |
| discovery                                |      |       |
| Is not too warm                          | 81,4 | 172   |
| Has quiet environments                   | 80,4 | 145   |
|  |      |       |

| Avtivity                                  |      |       |
|---|------|-------|
| (n=1180)                                  | %    | Index |
| Observe beauty of nature                  | 82,0 | 127   |
| Observe natural phenomenon (i.e.          | 72,3 | 186   |
| volcanoes, northern lights, midnight sun, |      |       |
| breaking waves, sand dune)                |      |       |
| Experience mountains                      | 69,2 | 141   |
| Hiking (more than two hours)              | 64,3 | 136   |
| Hiking (less than two hours)              | 61,6 | 112   |



# Norway has a fragmented brand footprint



Instead of just looking at the overall perception

of Norway, what we do here is allocate people's

perception of Norway to their dominant idea of



# **Perception of Destinations – summary NETHERLANDS**

#### Perfect fit (>0,60)

Good fit (0,30-0,60)

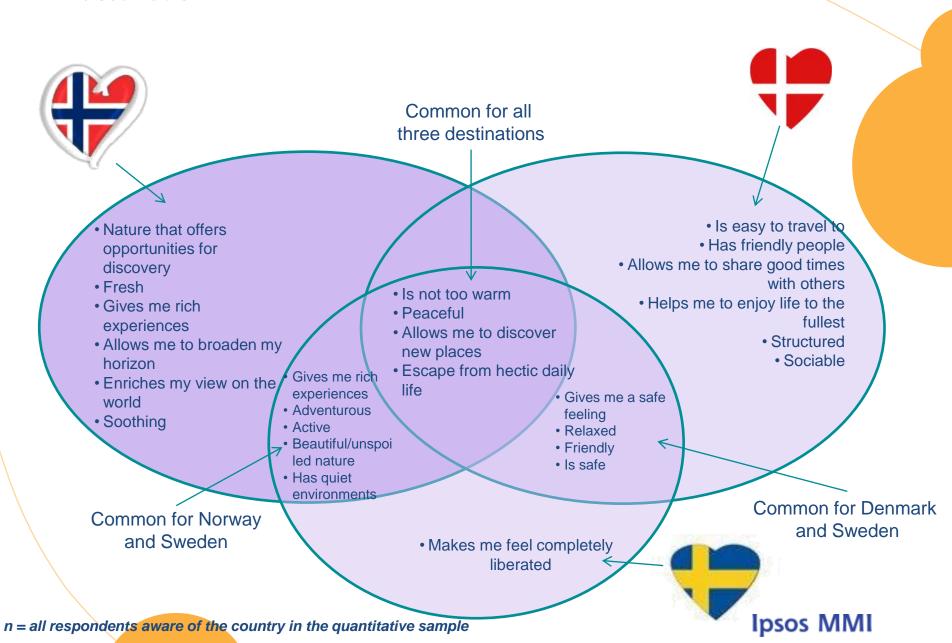
Neutral fit (-0,25-0,29)

Negative fit (<-0,25)

|                      | regardene (+ o)25/ |                       |              |         | , ,     |                         |        |             |
|----------------------|--------------------|-----------------------|--------------|---------|---------|-------------------------|--------|-------------|
|                      | Liberation         | Sharing Good<br>Times | Togetherness | Harmony | Routine | Broadening your horizon | Luxury | Exploration |
| Austria              | 0,35               | -0,30                 | 0,56         | 0,16    | 0,61    | -0,28                   | -0,35  | -0,40       |
| Canada               | 0,06               | -0,22                 | -0,08        | -0,11   | -0,20   | 0,06                    | 0,09   | 0,23        |
| China                | -0,29              | 0,10                  | -0,50        | -0,28   | -0,50   | 0,35                    | 0,28   | 0,47        |
| Croatia              | 0,34               | 0,48                  | 0,33         | 0,04    | -0,22   | 0,34                    | -0,48  | 0,25        |
| Denmark              | 0,31               | -0,12                 | 0,58         | 0,12    | 0,59    | 0,00                    | -0,51  | -0,34       |
| Egypt                | -0,42              | 0,00                  | -0,44        | -0,08   | -0,30   | 0,15                    | 0,34   | 0,25        |
| Finland              | 0,23               | -0,28                 | 0,10         | -0,14   | -0,12   | -0,04                   | 0,04   | 0,12        |
| France               | 0,00               | -0,03                 | 0,28         | 0,30    | 0,50    | -0,28                   | -0,16  | -0,49       |
| Germany              | 0,01               | -0,14                 | 0,34         | 0,33    | 0,82    | -0,25                   | -0,33  | -0,55       |
| Greece               | 0,18               | 0,40                  | 0,50         | 0,23    | 0,10    | 0,07                    | -0,45  | -0,18       |
| Italy                | -0,26              | 0,34                  | -0,18        | 0,25    | -0,18   | -0,18                   | 0,28   | -0,32       |
| New Zealand          | -0,06              | -0,30                 | -0,27        | -0,26   | -0,46   | -0,07                   | 0,44   | 0,28        |
| Norway               | 0,41               | -0,32                 | 0,36         | -0,20   | -0,04   | 0,19                    | -0,26  | 0,25        |
| Spain                | 0,04               | 0,41                  | 0,23         | 0,27    | 0,34    | -0,15                   | -0,29  | -0,39       |
| Sweden               | 0,45               | -0,28                 | 0,50         | -0,04   | 0,22    | -0,01                   | -0,34  | -0,05       |
| Switzerland          | 0,06               | -0,45                 | 0,20         | 0,14    | 0,33    | -0,25                   | 0,06   | -0,31       |
| Turkey               | 0,07               | 0,32                  | 0,27         | 0,29    | 0,07    | 0,08                    | -0,33  | -0,14       |
| <b>United States</b> | -0,50              | 0,10                  | -0,72        | 0,01    | -0,18   | -0,31                   | 0,65   | -0,09       |
| Scotland             | 0,41               | -0,15                 | 0,34         | -0,19   | -0,35   | 0,14                    | -0,20  | 0,40        |



# Destination features and activities respondents associate with each destination





# 5a. Key Conclusions- Across <u>all</u> three markets



**GLOBAL CONCLUSIONS** 



## Key Conclusions - Across all three markets

# 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.

- ⇒ Across all markets, Norway is often associated with Exploration and Broadening your Horizon.
- ⇒ But the strength of this association is relatively weak.



# 5b. Key Conclusions & Recommendations



The Netherlands

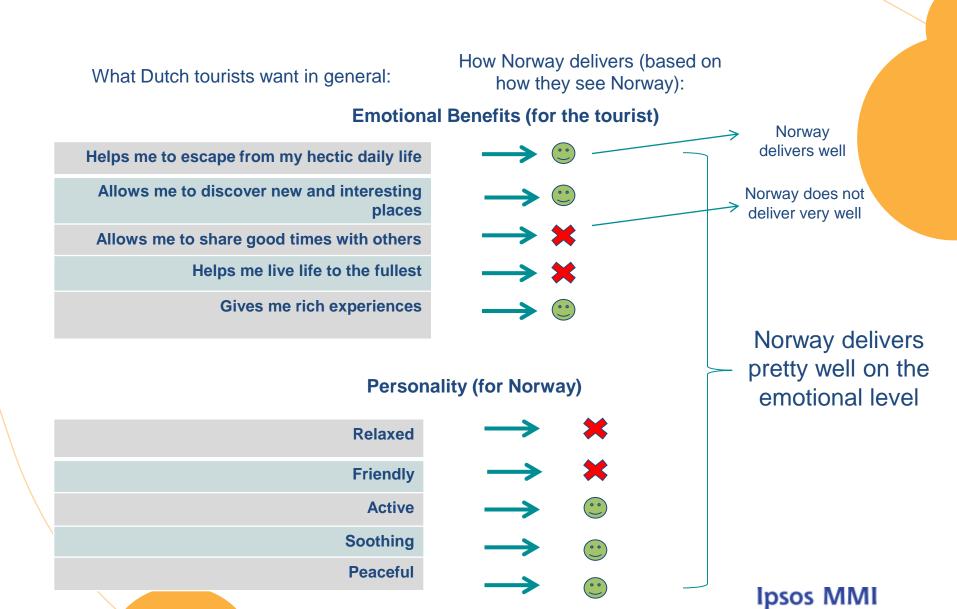


# **Key conclusions - The Netherlands**

- 1. Reach minimum level of generic holiday expectations
- 2. Positioning of Norway: Norway is mostly associated with Exploration

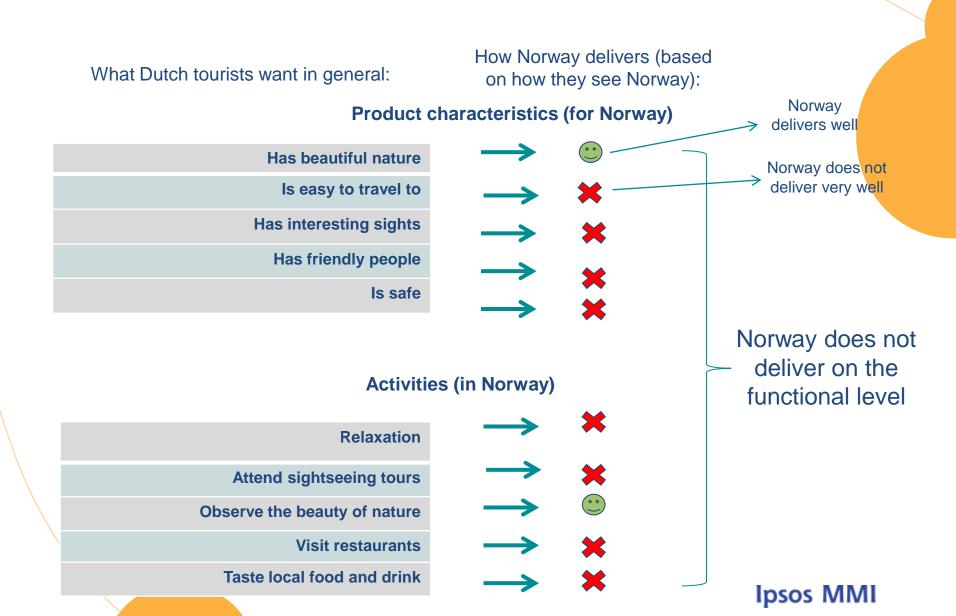


## *Key Conclusions – The Netherlands*





## **Key Conclusions and Recommendations – Netherlands**





## **Key Conclusions – Netherlands**

- A social, less isolated experience
  - ⇒ 'Populate' towns and landscapes

  - ⇒ Isolation as a choice, not a given
- An easy, comfortable travel experience

  - ⇒ Visualising the holiday: knowing how to travel, where to go

  - ⇒ Portray friendly 'Scandinavian' people



## **Key Conclusions – Netherlands**

- Local cuisine
  - □ Importance of local food and drink
  - ⇒ Also a good variety of contemporary international cuisine
- Offer a wide range of activities and interesting sights
  - Not just the more extreme and niche activities that Norway is currently most associated with
- Importance of cultural differences between the two countries
  - ⇒ It is not like home!
  - ⇒ Rich experiences that help you escape from your hectic daily life



### **Key Conclusions – Netherlands**

# 2. Positioning of Norway: Norway is mostly associated with Exploration

# Exploration

- Addresses 18% (the segment volume of Exploration) of all Dutch holidays abroad
- Already the most important reason why the Dutch currently travel to Norway
- Decent perceptual fit
- Competition is relatively weak
  - ⇒ China, Canada, New Zeeland & Scotland all have a presence in this area, but none of them as a strong perceptual or behavioral leader
  - ⇒ Proximity is key advantage over far away destinations





# **Appendix**

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



# A) Description of each segment



# Liberation

**Description** 



# **LIBERATION**

# - Active and fresh



#### **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, soothing and fresh.

#### Most important differentiators:

- Personality:
  - Active
  - Relaxed
  - Fresh
  - Friendly
  - Soothing
- Emotional benefits:
  - · Makes me feel full of energy
  - Helps me to enjoy life to the fullest
  - Helps me escape from a hectic daily life
  - · Makes me feel completely liberated
  - Allows me to come to my senses

- Destination characteristics:
  - Is easy to travel to
  - Has beautiful nature
  - Is safe
  - Has unspoiled nature
  - Has friendly people
  - Activities:
    - Relaxation
    - Observe beauty of nature
    - · Taste local food and drink
    - Visit restaurants
    - Experience mountains
  - Type of holiday:
    - Skiing holiday
    - Camping holiday
    - Hiking holiday



# **LIBERATION**

# - Active and fresh



#### Who:

- A marginal male dominance, 40-49 years is the most dominant age group. The age group 30-59 years constitutes 72% of the sample.
- They travel with their spouse/partner (71%), friends (24%) and/or children aged 7 or more (32%)
- Educational level: Higher education (37%), Secondary vocational (29%)
- Marital status: Married/partner with children (51%), Single without children (16%), Partner/married without children (29%).

### **How do they travel:**

- · Transport to destination dominated by car
- Transport during stay dominated by own car
- Most common accommodation:
  - Rented or borrowed cabin / holiday home / flat
  - Hotel (medium standard)
  - Caravan
  - Tent
- 81% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (61%) or their friends (22%)

- Information sources:
  - Internet in general (67%)
  - Websites about destination (52%)
  - Hotel/accommodation websites (42%)
- Planning horizon:
  - 15% decided on the holiday up to 2 months before departure
  - 15% decided on the holiday up to 3 months before departure
  - 15% decided on the holiday 6-12 months before departure
  - 27% decided on the holiday 4-6 months before departure



# **Sharing Good Times**

**Description** 

# **Sharing Good Times**

- Sociable, relaxed and friendly





#### **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:
  - Sociable
  - Friendly
  - Relaxed
- · Emotional benefits:
  - Allows me to share good times with others
  - Helps me to meet new people
  - Allows me to immerse myself in the local culture
  - Allows me to discover new and interesting places
- Destination characteristics:
  - Is easy to travel to
  - Has friendly people
  - Has interesting sights
  - Offers a wide range of possible activities
  - Has good local cuisine

- · Activities:
  - Visit restaurants
  - Relaxation
  - Taste local food and drink
  - Attend sightseeing tours
  - Visit cities
- Type of holiday:
  - · Visiting friends and relatives
  - Summer holiday
  - Sightseeing/round trip

# **Sharing Good Times**

- Sociable, relaxed and friendly



#### Who:

- 40-59 years is the most dominant age group, constituting 46% of the sample. This is also one of the most important segments for people 60-65 years old.
- They travel with their spouse/partner (55%), friends (25%) other family/relatives (21%) and/or young children aged 0-6 years (16%)
- Educational level: Higher education (32%), Secondary vocational (25%)
- Marital status: Married with children (42%), Single without children (28%)

#### How do they travel:

- Transport to destination dominated by car (59%) and scheduled flight (30%)
- Transport during stay dominated by own car (47%), bus (26%), rented car (11%) or train (11%)
- · Most common accommodation:
  - Hotel (medium standard)
  - Rented or borrowed cabin / holiday home / flat
- 75% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (45%), no one except themselves (19%) or their friends (24%)

- Information sources before travelling:
  - Internet in general (68%)
  - · Websites about destination (37%)
  - Hotel/accommodation websites (37%)
- · Planning horizon:
  - 21% decided on the holiday up to 3 months before departure
  - 21% decided on the holiday up to 3 months before departure
  - 25% decided on the holiday 4-6 months before departure



# **Togetherness**

Description

#### **TOGETHERNESS**

Relaxed, friendly, soothing, peaceful and cozy





#### **Segment core:**

- Holidays are a means of intensifying or cultivating relationships with others, especially family rext indea amily. 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:
  - Relaxed
  - Friendly
  - Soothing
  - Peaceful
  - Cozy
- · Emotional benefits:
  - Helps me escape from my hectic daily life
  - · Creates precious moments of togetherness
  - Allows me to intensify the relationships with my loved one(s)
  - Allows me to share good times with others
  - Allows me to spoil my loved ones

- · Destination characteristics:
  - Is easy to travel to
  - Is safe
  - Has beautiful nature
  - Has friendly people
  - · Is easy to travel around
  - Activities:
    - Relaxation
    - Visit restaurants
    - · Attend sightseeing tours
    - Taste local food and drink
    - Observe the beauty of nature
  - Type of holiday:
    - Summer holiday (annual holiday)
    - Sun and beach holiday
    - Cottage holiday
    - Camping holiday

#### **TOGETHERNESS**

- Relaxed, friendly, soothing, peaceful and cozy



#### Who:

- A marginal female dominance (54%), 40-59 years is the most dominant age group (57%). The age group 30-59 years constitutes 77% of the sample.
- They travel with their spouse/partner (84%) and/or children (60%).
- Educational level: Higher education (38%), Secondary vocational (27%) or Phd/academic degree (17%)
- Marital status: Married with children (55%) or Married/partner without children (23%).

#### **How do they travel:**

- Transport to destination dominated by car (70%) and scheduled flight (15%) or charter plane (13%)
- Transport during stay dominated by own car (65%), bus (15%) or rented car (11%)
- Most common accommodation:
  - Rented or borrowed cabin / holiday home / flat (33%)
  - Hotel (medium standard) (21%)
- 84% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (76%), Children over 7 years (22%) or parents/other relatives (14%)

- Information sources before travelling:
  - Internet in general (73%)
  - Websites about destination (53%)
  - Hotel/accommodation websites (43%)
  - Sights/attractions' websites (29%)
- Planning horizon:
  - 13% decided on the holiday up to 1 month before departure
  - 15% decided on the holiday up to 2 months before departure
  - 14% decided on the holiday up to 3 months before departure
  - 27% decided on the holiday 4-6 months before departure
  - 15% decided on the holiday 6-12 months before departure



# **Harmony**

**Description** 

## Harmony

## - Cultivated, contemporary and caring

Segment size 2%



#### **Segment core:**

- The basic motivation for going on holidays is to RECONNECT WITH A SENSE OF HARMONY A ND BA\_ANCE, 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:
  - Friendly
  - Contemporary
  - Relaxed
  - Cultivated
  - Caring
  - Soothing
- Emotional benefits:
  - · Allows me to pamper myself
  - Give me a sense of being well cared for
  - · Gives me a safe feeling
- Destination characteristics:
  - Is easy to travel to
  - Is safe
  - Has good service
  - · Has friendly people
  - Has interesting sights

#### Activities:

- Relaxation
- Visit restaurants
- Visit cities
- Taste local food and drink
- Shopping
- Attend sightseeing tours
- · Get pampered
- Type of holiday:
  - Sun and beach holiday
  - Cottage holiday
  - · Visiting friends and relatives
  - Sightseeing/round trip
  - City trip/city break

## Harmony

## - Cultivated, contemporary and caring



#### Who:

- 30-49 years is the most dominant age group and constitutes 56% of the sample.
- They travel with their spouse/partner (60%), any children (36%), other family/relatives (22%) and/or friends (20%)
- Educational level: Higher education (33%), Secondary vocational (27%), Phd/academic degree (18%).
- Marital status: Married with children (44%), Single without children (29%), Cohabitant/partner with children (13%).

#### How do they travel:

- Transport to destination dominated by car (53%), scheduled flight (20%), bus (18%), charter flight (15%) and ferry/boat/cruise (13%)
- Transport during stay dominated by own car (47%), bus (26%) or train (13%)
- Most common accommodation:
  - Hotel (medium standard) (38%)
  - Rented or borrowed cabin/holiday home/flat (24%)
  - Hotel (high standard) (20%)
- 76% of them organised the trip themselves and travelled independently, while 20% travelled in a group with an organized tour
- Their choice of holiday/destination is influenced by their partner (58%) or their friends (20%)

- · Information sources before travelling:
  - Internet in general (78%)
  - Hotel/accommodation websites (42%)
  - Websites about destination (36%)
  - Sights/attractions' websites (27%)
- Planning horizon:
  - 29% decided on the holiday up to 1 month before departure
  - 24% decided on the holiday up to 2 months before departure



# **Routine**

Description

#### Routine

#### - Predictable, practical and structured





- 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.
- 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:
  - Practical
  - Predictable
  - Relaxed
  - Structured
  - Friendly
- · Emotional benefits:
  - Avoids too much surprises
  - · Allows me to keep everything under control
  - · Gives me a safe feeling
- Destination characteristics:
  - Is easy to travel to
  - Is safe
  - Is easy to travel around
  - · Has beautiful nature
  - Has good local cuisine

- · Activities:
  - Relaxation
  - Visit restaurants
  - Taste local food and drink
  - Attend sightseeing tours
  - · Observe the beauty of nature
  - Visit cities
- Type of holiday:
  - · Cottage holiday
  - Sun and beach holiday
  - · Camping holiday
  - · Visiting friends and relatives
  - · Ski holiday

## Routine

## - Predictable, practical and structured



#### Who:

- Male dominance (62%), 30-59 years is the most dominant age group. The age group constitutes 69% of the sample.
- They travel with their spouse/partner (65%), Any children (49%), other family/relatives (24%) and/or friends (18%).
- Educational level: Higher education (51%) or Secondary vocational (21%).
- Marital status: Married with children (44%), Cohabitant/partner without children (18%), Single without children (15%) and Married without children (8%)

#### **How do they travel:**

- Transport to destination dominated by car (67%), charter flight (12%) and scheduled flight (15%)
- Transport during stay dominated by own car (64%), bus (12%) or rented car (10%)
- Most common accommodation:
  - Rented or borrowed cabin / holiday home / flat (36%)
  - Hotel medium standard (21%)
  - Caravan/camper van (12%)
  - Hotel high standard (11%)
- 81% of them organised the holiday themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (55%), parents or other relatives (21%), nobody except themselves (16%) or their friends (16%)

- Information sources before travelling:
  - Internet in general (67%)
  - Websites about destination (59%)
  - Hotel/accommodation websites (44%)
  - Sights/attractions' websites (28%)
- Planning horizon:
  - 14% decided on the holiday up to 3 months before departure
  - 22% decided on the holiday up to 3 months before departure
  - 21% decided on the holiday 4-6 months before departure



# Broadening your horizon

Scorecards

## Broadening your horizon

## - Friendly, authentic and open-minded



#### **Segment core:**

- The basic motive for going on holidays is to EXPAND ONES KNOWLEDGE; to learn.
- Holiday abroad is about discovering new and interesting places. It is a period in which you experience freedom and independence, a period not to think of others. A period to escape from daily duties, responsibilities and dependence. Holidays abroad are there to get to know a different type of world, to gain more knowledge. Holidays abroad is a means to develop oneself and experience new things.
- There's a hint of cultural exploration here.
- Exploring a new and unknown world comes with feelings of uncertainty. The trips also tend to be short breaks. They try to control this by gaining information before their visit and prepare 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 evolve themselves.
- Ancient cultures and famous sites are important.

#### **Most important differentiators:**

- Personality:
  - Open-minded
  - Authentic
  - Friendly
- · Emotional benefits
  - Allows me to discover new and interesting places
  - · Enriches my view on the world
  - Allows me to broaden my knowledge
  - · Allows me to broaden my horizon
  - · Gives me rich experiences
- · Destination features
  - · Has interesting sights
  - Has interesting culture & art
  - · Has friendly people
  - · Has beautiful nature
  - Has rich cultural heritage

- Activities:
  - Sightseeing
  - Visit cities
  - · Taste local food and drink
  - Discover local culture & lifestyle
  - · Visit historical buildings/sites
  - Experience local architecture
  - · Discover local history & legends
  - Visit museums
  - · Visit parks and gardens
- Type of holiday:
  - Sightseeing/roundtrip
  - · Visiting friends and relatives
  - City trip/city break

## Broadening your horizon

- Authentic, open-minded and cultivated



#### Who:

- Male domination (56%), 50-65 years is most dominant age group, constitutes 56% of the sample.
- They travel with their spouse/partner (70%), friends (17%) and/or any children (40%)

#### How do they travel:

- Transport to destination dominated by car (45%), scheduled plane (33%), bus (14%) and train (11%)
- Transport during stay dominated by own car (37%), bus (29%), or rented car (18%)
- Most common accommodation:
  - Hotel medium standard (39%)
  - Rented or borrowed cabin / holiday home / flat (23%)
  - Hotel high standard (16%)
- 69% of them organized the trip themselves and traveled independently
- 17% travelled in a group with an organized tour.
- Their choice of holiday/destination is influenced by their partner (61%), nobody except themselves (16%) or their friends (19%)

- Information sources before travelling:
  - Internet in general (73%)
  - Homepages for destination (53%)
  - Homepages for hotels/accommodation (46%)
  - Homepages of sights/attractions (36%)
- Planning horizon:
  - 27% decided on the trip 4-6 months before departure
  - 17% decided on the trip up to 3 months before departure
  - 19% decided on the trip up to 2 months before departure



# Luxury

**Scorecards** 

HAS TO FEW INTERVIEWS TO BE REPORTED IN DETAIL

## Luxury

#### - Luxurious, classy and indulgent



#### Segment core:

- The basic motive for going on holidays is to IMPRESS OTHERS, to stand out from the crowd.
- This kind og holiday abroad is a proof of one's superiority, high social class, success, stability.
- Reason to go for holidays abroad: to feel indulged in enhanced living standards and comfort, to get the sense of self-pride and proof of one's accomplishment.
- Experience/satisfaction looked for: feel exposed to luxuries, "bathe" in self-respect and superiority, demonstrate one's achievements and get the sense of power.
- It's about shopping, visiting restaurants and getting pampered.

#### **Most important differentiators:**

- · Personality:
  - Superior
  - Extravagant
  - Classy
  - Luxurious
  - Cozy
  - Peaceful
- · Emotional benefits
  - · Allows me to indulge myself in a bit of luxury
  - · Makes me feel on top of the world
  - · Shows that I'm successful in life
  - Allows me to impress other people
- · Destination features
  - · Has good local cuisine
  - Has good service
  - · Has guaranteed sunshine
  - Has good shopping
  - · Has beautiful nature
  - Has classy restaurants

- Activities:
  - Taste local food and drink
  - Visit restaurants
  - Visit cities
  - Relaxation
  - Shopping
  - · Get pampered
  - Sunbathing and swimming
  - · Visit spa resorts
- Type of holiday:
  - · Visiting friends and relatives
  - · Sight seeing



# **Exploration**

**Scorecards** 

## **Exploration**

## - Adventurous, explorative, active and unique

#### **Segment core:**

- The basic motive for going on holidays is to GET RICH EXPERIENCES, to get mind and body refreshment, rejuvenation and satisfy my hunger for unique impressions. Role of holiday abroad: open up maximum opportunities for exploration of self and the world, maximization of experience.
- Reason to go for holidays abroad: derive pleasure from learning new capabilities, pioneering in terms of destinations and activities, aspire to open them up, to be the first ones there .
- Experience/satisfaction looked for: active, always in a move, get refreshment and adrenalin for body and mind. Inspiration with new knowledge and experiences. They seek « innovations » with respect to travelling-style, e.g. brand new ways of transportation (e.g. not just car or ship, BUT cycling, helicopter), activities and holiday planning (e.g. Interactive websites)

#### **Most important differentiators:**

- · Personality:
  - Adventurous
  - Explorative
  - Unique
  - Active
- Emotional benefits
  - Gives me rich experiences
  - Allows me to discover new and interesting places
  - · Helps me escape from my hectic daily life
  - Allows me to share good times with others
  - · Enriches my view on the world
- · Destination features
  - · Has beautiful nature
  - Has interesting sights
  - Allows me to have unique experiences
  - Has unspoiled nature

- Activities:
  - Observe beauty of nature
  - Attend sight seeing tours
  - Relaxation
  - Hiking (less than 2 hours)
  - Discover local culture and lifestyle
  - Experience mountains
  - Discover local history and legends
- Type of holiday:
  - Sightseeing/round trip
  - Summer holiday/main holiday/annual leave
  - Visiting friends and family
  - Holiday to experience nature, scenery and wildlife
  - Camping holiday

## **Exploration**

- Adventurous, explorative, active and unique

#### Who:

- A male dominance (57%), 40-59 years is most dominant age group, constitutes 51% of the sample.
- They travel with their spouse/partner (70%), friends (16%) and/or children aged 7-14 years (12%)

#### **How do they travel:**

- Transport to destination dominated by car (54%), scheduled plane (29%) and charter plane (17%)
- Transport during stay dominated by own car (43%), bus (23%) or rented car (22%)
- Most common accommodation:
  - Hotel medium standard (30%)
  - Rented or borrowed cabin / holiday home (22%)
  - Hotel high standard (13%)
- 66% of them organized the trip themselves and traveled independently
- 16% travelled in a group with an organized tour
- Their choice of holiday/destination is influenced by their partner (62%), nobody except themselves (15%) or their friends (17%)

- Information sources before travelling:
  - Internet in general (84%)
  - Homepages for destination (57%)
  - Homepages for hotels/accommodation (46%)
  - Homepages of sights/attractions (38%)
- Planning horizon:
  - 18% decided on the trip up to 2 months before departure
  - 19% decided on the trip up to 3 months before departure
  - 23% decided on the trip 4-6 months before departure
  - 20% decided on the trip up to 6-12 months before departure



# b) Competing destinations

Common ground analysis



## **Comparison Austria vs. Norway (Dutch base)**

|                      | <b>Destination features</b>   |
|----------------------|---|
| Unique to<br>Norway  | Has beautiful nature Has unspoiled nature Has nature that offers opportunity for discovery Has quiet environments Allows me to live close to nature |
| Common ground        | Is not too warm Is safe Has attractive mountain areas Has good medical Care   |
| Unique to<br>Austria | Is easy to travel to Has few language barriers Has activities for kids  |

|                      | Activities  |
|----------------------|---|
| Unique to<br>Norway  | Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc) Experience wilderness  |
| Common<br>ground     | Experience mountains Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc) Kayaking/canoeing Extreme sports Alpine skiing/snowboarding Rafting |
| Unique to<br>Austria | Hiking (less than two hours)  |

|                      | <b>Emotional benefits</b>   |
|----------------------|---|
| Unique to<br>Norway  | Allows me to discover new and interesting places Makes me feel completely liberated   |
| Common ground        | Helps me escape from my hectic daily life<br>Restores my sense of harmony and balance<br>Gives me a safe feeling                  |
| Unique to<br>Austria | Helps me enjoy life to the fullest Makes me full of energy Create precious moments of togetherness Allows me to come to my senses |

|                      | Personality                    |
|----------------------|--------------------------------|
| Unique to<br>Norway  | Adventurous                    |
| Common ground        | Active Peaceful Soothing Fresh |
| Unique to<br>Austria | Cozy<br>Practical              |

#### Scorecard -Austria

| Emotional benefits                           |      |       |
|--|------|-------|
| (n=286)                                      | %    | Index |
| Helps me to escape from my hectic daily life | 59,8 | 111   |
| Allows me to share good times with others    | 51,0 | 109   |
| Gives me a safe feeling                      | 51,0 | 136   |
| Helps me to enjoy life to the fullest        | 49,7 | 110   |
| Makes me feel full of energy                 | 48,3 | 123   |
| Avoids too much surprises                    | 21,3 | 177   |
| Gives me a sense of being well cared for     | 34,3 | 134   |
| Allows me to keep everything under control   | 22,4 | 133   |
| Restores my sense of harmony and balance     | 31,8 | 122   |

| Destination features            |      |       |
|---------------------------------|------|-------|
| (n=286)                         | %    | Index |
| Has attractive mountain areas   | 91,6 | 140   |
| Has beautiful nature            | 87,4 | 108   |
| Is easy to travel to            | 84,6 | 123   |
| Is safe                         | 81,5 | 120   |
| Is not too warm                 | 74,5 | 137   |
|                                 |      |       |
| Allows me to be physical active | 69,9 | 142   |
| Has few language barriers       | 69,9 | 141   |
| Is not too different from home  | 25,2 | 138   |
| Has good medical care           | 71,7 | 136   |
| Has activities for kids         | 46,5 | 126   |
| Is well organized               | 63,6 | 124   |

| Personality       |      |       |
|-------------------|------|-------|
| (n=286)           | %    | Index |
| Active            | 61,5 | 131   |
| Friendly          | 57,7 | 105   |
| Relaxed           | 55,2 | 99    |
| Peaceful          | 49,7 | 119   |
| Cozy              | 46,9 | 176   |
|                   |      |       |
| <u>Fresh</u>      | 43,0 | 145   |
| <u>Practical</u>  | 40,2 | 143   |
| Structured        | 38,5 | 134   |
| <u>Harmonious</u> | 38,8 | 133   |
| Predictable       | 25,5 | 132   |
| Caring            | 28,7 | 129   |

| Activity  |      |       |
|---|------|-------|
| (n=286)   | %    | Index |
| Experience mountains  | 88,8 | 174   |
| Observe beauty of nature                                    | 74,8 | 112   |
| Hiking (less than two hours)                                | 71,7 | 126   |
| Alpine skiing/snowboarding                                  | 71,3 | 277   |
| Hiking (more than two hours)                                | 68,9 | 141   |
|   |      |       |
| Cross country skiing  | 44,8 | 259   |
| Do winter activities (dog-sleigh, snowmobile etc)           | 49,0 | 208   |
| Extreme sport activities (mountain climbing, kiting,        | 56,6 | 201   |
| paragliding etc) Attend theatre, ballet, opera performances | 28,7 | 169   |
| Rafting   | 36,4 | 155   |
| Kayaking/canoeing   | 37,4 | 131   |
| Visit or take part in sports events                         | 17,5 | 131   |
| Fresh water fishing   | 25,2 | 128   |



## **Comparison Canada vs. Norway (Dutch base)**

|                     | <b>Destination features</b>  |
|---------------------|--|
| Unique to<br>Norway | Has beautiful nature Is safe Is expensive  |
| Common<br>ground    | Has unspoiled nature Has nature that offers opportunities for discovery Is not too warm Has quiet environments Allows me to live close to nature Has attractive mountain areas |
| Unique to<br>Canada | Has few language barriers<br>Has friendly people   |

|                     | Activities   |
|---------------------|--|
| Unique to<br>Norway | Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc)   |
| Common<br>ground    | Observe natural phenomenon (i.e. northern lights etc) Experience mountains Hiking (more than two hours) Experience wilderness Do winter activities (dog-sleigh, snowmobile etc) Experience wildlife Kayaking/canoeing Extreme sports |
| Unique to<br>Canada | Visit national parks   |

|                     | <b>Emotional benefits</b>  |
|---------------------|--|
| Unique to<br>Norway | Allows me to discover new and interesting places Helps me escape from my hectic daily life |
| Common ground       | Gives me a safe feeling<br>Makes me feel completely liberated                              |
| Unique to<br>Canada | Enriches my view on the world  |

|                     | Personality                                |  |
|---------------------|--|--|
| Unique to<br>Norway | Harmonious<br>Classy                       |  |
| Common ground       | Adventurous Active Peaceful Fresh Soothing |  |
| Unique to<br>Canada | Friendly Unique Practical                  |  |



#### **Scorecard - Canada**

| %    | Index                                |
|------|--------------------------------------|
| 60,6 | 99                                   |
| 56,2 | 110                                  |
| 55,5 | 105                                  |
| 54,7 | 98                                   |
| 52,6 | 109                                  |
|      |                                      |
| 24,1 | 146                                  |
| 22,6 | 132                                  |
|      | 60,6<br>56,2<br>55,5<br>54,7<br>52,6 |

| Destination features                               |      |       |
|--|------|-------|
| (n=137)  | %    | Index |
| Has beautiful nature                               | 79,6 | 117   |
| Has unspoiled nature                               | 78,1 | 135   |
| Has nature that offers opportunities for discovery | 72,3 | 124   |
| Has attractive mountain areas                      | 68,6 | 125   |
| Has quiet environments                             | 68,6 | 128   |
|  |      |       |
| Is an upper class destination                      | 24,8 | 217   |
| Has few language barriers                          | 67,2 | 161   |
| Allows me to live close to nature                  | 67,9 | 148   |
| Is not for just anybody, is exclusive              | 21,2 | 145   |
| Has good medical care                              | 61,3 | 139   |
| Is well organized                                  | 57,7 | 134   |
| Allows me to grow personally                       | 27,0 | 132   |
| Is not ruined by tourism                           | 49,6 | 129   |
| Allows me to have unique experiences               | 61,3 | 127   |
| Has environmentally friendly offers                | 20,4 | 123   |
| Has friendly people                                | 66,4 | 123   |
| Allows me to be physical active                    | 50,4 | 122   |
| Is not too warm                                    | 54,7 | 120   |

| Personality |      |       |
|-------------|------|-------|
| (n=137)     | %    | Index |
| Adventurous | 54,7 | 139   |
| Friendly    | 51,1 | 114   |
| Relaxed     | 46,7 | 103   |
| Active      | 42,3 | 110   |
| Peaceful    | 39,4 | 116   |
|             |      |       |
| Superior    | 10,9 | 158   |
| Fresh       | 33,6 | 139   |
| <del></del> |      |       |

| Activity  |      |       |
|---|------|-------|
| (n=137)   | %    | Index |
| Observe beauty of nature  | 71,5 | 117   |
| Visit national parks  | 65,7 | 164   |
| Experience mountains  | 65,0 | 139   |
| Experience the wilderness   | 62,0 | 190   |
| Experience wildlife   | 61,3 | 234   |
|   |      |       |
| Rafting   | 43,1 | 200   |
| Do winter activities (dog-sleigh, snowmobile etc)   | 43,1 | 200   |
| Kayaking/canoeing   | 44,5 | 170   |
| Cross country skiing  | 26,3 | 166   |
| Alpine skiing/snowboarding  | 35,8 | 152   |
| Extreme sport activities (mountain climbing, kiting, paragliding etc)                                 | 38,7 | 150   |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) | 48,9 | 133   |
| Visit or take part in sports events   | 16,1 | 131   |
| Salt water fishing  | 21,2 | 125   |
| Hiking (more than two hours)  | 54,0 | 121   |



## **Comparison Denmark vs. Norway (Dutch base)**

|                      | <b>Destination features</b>   |
|----------------------|---|
| Unique to<br>Norway  | Has beautiful nature Has unspoiled nature Has nature that offers opportunities for discovery Has quiet environments Allows me to live close to nature |
| Common ground        | Is not too warm Is safe Has good medical care   |
| Unique to<br>Denmark | Is easy to travel to Has friendly people Is easy to travel around Has good service  |

|                      | <b>Emotional benefits</b>   |
|----------------------|---|
| Unique to<br>Norway  | Allows me to discover new and interesting places  |
| Common ground        | Helps me escape from a hectic daily life<br>Gives me a safe feeling<br>Makes me feel completely liberated |
| Unique to<br>Denmark | Allows me to intensify my relationship with my loved one(s)   |

|                      | Activities   |
|----------------------|--|
| Unique to<br>Norway  | Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc) Experience mountains Experience wilderness Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc) |
| Common ground        | Saltwater fishing Freshwater fishing   |
| Unique to<br>Denmark | Relaxation Visit the countryside Hiking (less than two hours) Visit cities   |

|                      | Personality                          |
|----------------------|--------------------------------------|
| Unique to<br>Norway  | Adventurous<br>Active<br>Soothing    |
| Common ground        | Peaceful Fresh Structured Harmonious |
| Unique to<br>Denmark | Friendly Sociable Practical          |



#### **Scorecard - Denmark**

| Emotional benefits                               |      |       |
|--|------|-------|
| (n=175)  | %    | Index |
| Gives me a safe feeling                          | 54,9 | 167   |
| Helps me to escape from my hectic daily life     | 53,1 | 114   |
| Allows me to discover new and interesting places | 46,3 | 90    |
| Allows me to share good times with others        | 44,0 | 107   |
| Helps me to enjoy life to the fullest            | 42,3 | 108   |
| Allows me to keep everything under control       | 22,3 | 152   |
| Avoids too much surprises                        | 15,4 | 147   |

| Destination features                |      |       |
|-------------------------------------|------|-------|
| (n=175)                             | %    | Index |
| Is not too warm                     | 85,1 | 193   |
| Is easy to travel to                | 85,1 | 153   |
| Is safe                             | 84,0 | 153   |
| Has friendly people                 | 72,6 | 139   |
| Has good medical care               | 70,3 | 165   |
|                                     |      |       |
| Is not too different from home      | 41,7 | 283   |
| Has environmentally friendly offers | 28,6 | 178   |
| Is well organized                   | 67,4 | 162   |
| <u>Is expensive</u>                 | 37,1 | 159   |
| Is easy to travel around            | 67,4 | 150   |
| Is not ruined by tourism            | 53,7 | 144   |
| Has activities for kids             | 42,3 | 142   |
| Has good service                    | 54,9 | 133   |
|                                     |      |       |

| Personality        |      |       |
|--------------------|------|-------|
| (n=175)            | %    | Index |
| Friendly           | 59,4 | 124   |
| Peaceful           | 54,3 | 151   |
| Relaxed            | 52,0 | 108   |
| Structured         | 44,6 | 179   |
| Sociable           | 41,7 | 132   |
| <u>Practical</u>   | 37,1 | 152   |
| <u>Fresh</u>       | 36,6 | 142   |
| Caring             | 27,4 | 142   |
| <u>Indulgent</u>   | 17,1 | 137   |
| <u>Harmonious</u>  | 33,1 | 131   |
| <u>Predictable</u> | 21,7 | 129   |
| Contemporary       | 36,6 | 122   |

| What Brands:Social Identity   |      |       |  |
|-------------------------------|------|-------|--|
| (n=175)                       | %    | Index |  |
| Relaxation                    | 65,7 | 133   |  |
| Visit the countryside         | 62,9 | 163   |  |
| Bicycling                     | 60,0 | 266   |  |
| Hiking (less than two hours)  | 59,4 | 139   |  |
| Attend sightseeing tours      | 58,9 | 110   |  |
|                               |      |       |  |
| Visit amusement parks         | 35,4 | 274   |  |
| Sailing                       | 28,6 | 178   |  |
| Attend concerts/festivals     | 22,3 | 177   |  |
| Fresh water fishing           | 25,1 | 170   |  |
| Salt water fishing            | 22,3 | 160   |  |
| Play with the children        | 30,3 | 156   |  |
| Visit art exhibitions         | 26,3 | 146   |  |
| Workout in gym/fitness centre | 13,1 | 143   |  |
| Visit parks and gardens       | 33,7 | 129   |  |
| <u>Visit museums</u>          | 42,9 | 128   |  |
| <u>Visit cities</u>           | 53,1 | 123   |  |





## **Comparison Finland vs. Norway (Dutch base)**

|                     | <b>Destination features</b>   |                     | Activities  |  |
|---------------------|---|---------------------|---|--|
| Unique to<br>Norway | Has attractive mountain areas   | Unique to<br>Norway | Experience mountains  |  |
| Common<br>ground    | Has beautiful nature Has unspoiled nature Has nature that offers opportunities for discovery Is not too warm Has quiet environments Allows me to live close to nature Is safe | Common ground       | Observe beauty of natural pheno lights, midnight sun, bruiking (more than two Experience the wildern Do winter activities (do Kayaking/canoeing Experience wildlife |  |
| Unique to Finland   | None  | Unique to Finland   | Visit national parks  |  |
|                     |   |                     |   |  |
|                     | <b>Emotional benefits</b>   |                     | Personality   |  |
| Unique to           | Helps me escape from a hectic daily life  Makes me feel completely liberated  | Unique to           | Active  |  |

|                     | Activities  |
|---------------------|---|
| Unique to<br>Norway | Experience mountains  |
| Common<br>ground    | Observe beauty of nature Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) Hiking (more than two hours) Experience the wilderness Do winter activities (dog-sleigh, snowmobile etc) Kayaking/canoeing Experience wildlife |
| Unique to Finland   | Visit national parks  |

|                     | <b>Emotional benefits</b>   |
|---------------------|---|
| Unique to<br>Norway | Helps me escape from a hectic daily life<br>Makes me feel completely liberated                                    |
| Common ground       | Allows me to discover new and interesting places Gives me a safe feeling Restores my sense of harmony and balance |
| Unique to Finland   | Allows me to come to my senses  |

|                      | Personality                         |
|----------------------|-------------------------------------|
| Unique to<br>Norway  | Active<br>Structured                |
| Common ground        | Adventurous Peaceful Soothing Fresh |
| Unique to<br>Finland | Relaxed<br>Unique                   |



#### **Scorecard - Finland**

| Emotional benefits                                 |      |       |
|--|------|-------|
| (n=91)   | %    | Index |
| Allows me to discover new and interesting places   | 41,8 | 117   |
| Helps me to escape from my hectic daily life       | 35,2 | 108   |
| Gives me rich experiences                          | 31,9 | 103   |
| Enriches my view on the world                      | 29,7 | 100   |
| Allows me to broaden my knowledge                  | 28,6 | 99    |
| Allows me to broaden my horizon                    | 28,6 | 101   |
| Makes me feel sophisticated                        | 7,7  | 266   |
| Allows me to show my superior lifestyle            | 4,4  | 184   |
| Makes me stand out from the crowd                  | 16,5 | 176   |
| Allows me to let go without restrictions           | 14,3 | 140   |
| Allows me to impress other people                  | 4,4  | 137   |
| Restores my sense of harmony and balance           | 19,8 | 125   |
| Allows me to come to my senses                     | 26,4 | 123   |
| Destination features                               |      |       |
| (n=91)   | %    | Index |
| Has beautiful nature                               | 62,6 | 130   |
| Has quiet environments                             | 60,4 | 159   |
| Has nature that offers opportunities for discovery | 60,4 | 146   |
| Has unspoiled nature                               | 60,4 | 148   |
| Is not too warm                                    | 59,3 | 184   |
| Has environmentally friendly offers                | 27,5 | 235   |
| Is expensive                                       | 36,3 | 212   |
| Is not ruined by tourism                           | 50,5 | 186   |
| Allows me to live close to nature                  | 56,0 | 173   |
| Is not for just anybody, is exclusive              | 14,3 | 139   |
| Has good medical care                              | 42,9 | 137   |
| ls safe  | 54,9 | 137   |
| Is an upper class destination                      | 11,0 | 136   |
| Is well organized                                  | 37,4 | 123   |
| Allows me to be physical active                    | 35,2 | 120   |

| Personality   |      |       |
|---|------|-------|
| (n=91)  | %    | Index |
| Relaxed   | 33,0 | 111   |
| Soothing  | 33,0 | 165   |
| Peaceful  | 31,9 | 143   |
| Fresh   | 31,9 | 201   |
| Adventurous   | 28,6 | 110   |
| Friendly  | 28,6 | 97    |
| Crazy   | 8,8  | 141   |
| Cozy  | 19,8 | 139   |
| <u>Harmonious</u>   | 19,8 | 126   |
| What Brands:Social Identity   |      |       |
| (n=91)  | %    | Index |
| Observe beauty of nature  | 52,7 | 127   |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) | 45,1 | 180   |
| Hiking (more than two hours)  | 44,0 | 144   |
| Do winter activities (dog-sleigh, snowmobile etc)   | 44,0 | 300   |
| Experience the wilderness   | 39,6 | 178   |
| Cross country skiing  | 28,6 | 265   |
| Workout in gym/fitness centre   | 15,4 | 201   |
| Experience wildlife   | 31,9 | 178   |
| Fresh water fishing   | 20,9 | 171   |
| Kayaking/canoeing   | 28,6 | 160   |
| Alpine skiing/snowboarding  | 24,2 | 151   |
| Salt water fishing  | 16,5 | 142   |
|   | 34,1 | 125   |



## Comparison New Zealand vs. Norway (Dutch base)

|                             | <b>Destination features</b>  |
|-----------------------------|--|
| Unique to<br>Norway         | Has beautiful nature Is not too warm Is safe Has attractive mountain areas   |
| Common ground               | Has unspoiled nature Has nature that offers opportunities for discovery Has quiet enviroments Allows me to live close to nature Is expensive |
| Unique to<br>New<br>Zealand | Has few language barriers Allows me to have unique experiences   |

|                             | Activities   |
|-----------------------------|--|
| Unique to<br>Norway         | Do winter activities (dog-sleigh, snowmobile etc) Alpine skiing/snowboarding Cross country skiing  |
| Common ground               | Observe beauty of nature Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) Experience mountains Hiking (more than two hours) Experience the wilderness |
| Unique to<br>New<br>Zealand | Visit national parks   |

|                             | <b>Emotional benefits</b>  |
|-----------------------------|--|
| Unique to<br>Norway         | Allows me to discover new and interesting places Helps me escape from a hectic daily life Gives me a safe feeling Makes me feel completely liberated |
| Common ground               | Restores my sense of harmony and balance<br>Makes me stand out from the crowd  |
| Unique to<br>New<br>Zealand | Enriches my view on the world  Makes me feel on top of the world  Makes me feel special  Allows me to let go without restrictions                    |

|                             | Personality                                |
|-----------------------------|--|
| Unique to<br>Norway         | Structured<br>Harmonious                   |
| Common<br>ground            | Adventurous Active Peaceful Soothing Fresh |
| Unique to<br>New<br>Zealand | Unique<br>Explorative                      |

lpsos /

#### **Scorecard - New Zealand**

| Emotional benefits                               |      |       |
|--|------|-------|
| (n=120)  | %    | Index |
| Allows me to discover new and interesting places | 50,0 | 99    |
| Enriches my view on the world                    | 48,3 | 116   |
| Gives me rich experiences                        | 43,3 | 100   |
| Allows me to broaden my horizon                  | 42,5 | 107   |
| Helps me to escape from my hectic daily life     | 40,8 | 89    |
|  |      |       |
| Allows me to impress other people                | 9,2  | 204   |
| Allows me to show my superior lifestyle          | 6,7  | 198   |
| Makes me feel on top of the world                | 22,5 | 166   |
| Shows that I am successful in life               | 6,7  | 166   |
| Makes me feel special                            | 20,8 | 149   |
| Restores my sense of harmony and balance         | 30,8 | 139   |
| Makes me stand out from the crowd                | 17,5 | 133   |
| Makes me feel sophisticated                      | 5,0  | 123   |
| Allows me to let go without restrictions         | 17,5 | 122   |

| Destination features                               |      |       |
|--|------|-------|
| (n=120)  | %    | Index |
| Has beautiful nature                               | 66,7 | 117   |
| Has unspoiled nature                               | 64,2 | 133   |
| Has nature that offers opportunities for discovery | 63,3 | 130   |
| Has quiet environments                             | 57,5 | 128   |
| Is safe  | 55,8 | 118   |
|  |      |       |
| Is not for just anybody, is exclusive              | 35,8 | 294   |
| Is an upper class destination                      | 20,8 | 218   |
| Has environmentally friendly offers                | 22,5 | 163   |
| Allows me to grow personally                       | 27,5 | 161   |
| Has few language barriers                          | 52,5 | 151   |
| Allows me to live close to nature                  | 55,0 | 144   |
| Is not ruined by tourism                           | 45,0 | 140   |
| Is expensive                                       | 27,5 | 136   |
| Has no kids  | 18,3 | 133   |
| Allows me to have unique experiences               | 51,7 | 128   |
| Allows me to be physical active                    | 43,3 | 126   |
|  |      |       |

| Personality        |      |       |
|--------------------|------|-------|
| (n=120)            | %    | Index |
| Adventurous        | 49,2 | 139   |
| Unique             | 42,5 | 148   |
| Active             | 41,7 | 121   |
| Relaxed            | 38,3 | 94    |
| Peaceful           | 37,5 | 123   |
|                    |      |       |
| Generous           | 16,7 | 144   |
| <u>Explorative</u> | 30,8 | 142   |
| Indulgent          | 14,2 | 134   |
| <u>Playful</u>     | 16,7 | 129   |
| <u>Fresh</u>       | 27,5 | 127   |
| Open-minded        | 22,5 | 126   |
| <u>Daring</u>      | 17,5 | 122   |
|                    |      |       |

| Activety  |      |       |
|---|------|-------|
| (n=120)   | %    | Index |
| Observe beauty of nature  | 61,7 | 137   |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) | 52,5 | 193   |
| Hiking (more than two hours)  | 49,2 | 149   |
| Visit national parks  | 48,3 | 164   |
| Experience mountains  | 47,5 | 138   |
| Experience the wilderness   | 47,5 | 197   |
| Extreme sport activities (mountain climbing, kiting, paragliding etc)                                 | 35,0 | 184   |
| Rafting   | 28,3 | 179   |
| Experience wildlife   | 33,3 | 172   |
| Kayaking/canoeing   | 31,7 | 164   |
| Diving  | 22,5 | 156   |
| Salt water fishing  | 18,3 | 146   |



## **Comparison Scotland vs. Norway (Dutch base)**

|                       | <b>Destination features</b>  |
|-----------------------|--|
| Unique to<br>Norway   | Is expensive Is well organized Has good medical care   |
| Common ground         | Has beautiful nature Has unspoiled nature Is not ruined by tourism Is not too warm Has quiet environments Has nature that offers opportunities for discovery |
| Unique to<br>Scotland | Has friendly people Has a rich cultural heritage Has romantic spots  |

|                       | Activities  |
|-----------------------|---|
| Unique to<br>Norway   | Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) Experience mountains Do winter activities (dog-sleigh, snowmobile etc) Kayaking/caneoing Alpine skiing/snowboarding |
| Common ground         | Observe beauty of nature Hiking (more than two hours) Experience the wilderness   |
| Unique to<br>Scotland | Hiking (less than two hours) Discover local history and legends Visit national parks  |

|                       | <b>Emotional benefits</b>   |
|-----------------------|---|
| Unique to<br>Norway   | Allows me to discover new and interesting places Helps me escape from a hectic daily life Gives me a safe feeling |
| Common ground         | Makes me feel completely liberated<br>Restores my sense of harmony and balance                                    |
| Unique to<br>Scotland | Gives me rich experiences<br>Makes me full of energy  |

|                       | Personality                                |
|-----------------------|--|
| Unique to<br>Norway   | Structured<br>Harmonious                   |
| Common ground         | Adventurous Active Peaceful Soothing Fresh |
| Unique to<br>Scotland | Authentic Unique Explorative               |



#### **Scorecard - Scotland**

| Emotional benefits                               |      |       |
|--|------|-------|
| (n=140)  | %    | Index |
| Allows me to discover new and interesting places | 60,7 | 103   |
| Helps me to escape from my hectic daily life     | 57,9 | 108   |
| Gives me rich experiences                        | 57,9 | 113   |
| Enriches my view on the world                    | 47,1 | 96    |
| Makes me feel full of energy                     | 47,1 | 121   |
|  |      |       |
| Makes me feel special                            | 21,4 | 130   |
| Allows me to show my superior lifestyle          | 5,0  | 127   |
| Restores my sense of harmony and balance         | 32,9 | 126   |

| Destination features                               |      |       |
|--|------|-------|
| (n=140)  | %    | Index |
| Has beautiful nature                               | 87,1 | 120   |
| Has unspoiled nature                               | 82,1 | 134   |
| Has nature that offers opportunities for discovery | 81,4 | 131   |
| Is not too warm                                    | 80,7 | 166   |
| Has quiet environments                             | 76,4 | 134   |
|  |      |       |
| Has few language barriers                          | 70,0 | 158   |
| Allows me to live close to nature                  | 70,7 | 145   |
| Allows me to be physical active                    | 61,4 | 140   |
| Is not ruined by tourism                           | 56,4 | 138   |
| Has romantic spots                                 | 56,4 | 129   |

| Personality              |      |       |
|--------------------------|------|-------|
| (n=140)                  | %    | Index |
| Adventurous              | 57,1 | 123   |
| Active                   | 56,4 | 125   |
| Relaxed                  | 54,3 | 102   |
| Friendly                 | 53,6 | 101   |
| Authentic                | 51,4 | 113   |
| Generous                 | 21,4 | 142   |
| Soothing                 | 48,6 | 136   |
| Cozy                     | 34,3 | 134   |
| Explorative              | 37,1 | 131   |
| <u>Fresh</u>             | 37,1 | 131   |
| Peaceful                 | 50,0 | 125   |
| Activity                 |      |       |
| (n=140)                  | %    | Index |
| Observe beauty of nature | 75,7 | 130   |
|                          |      |       |

| Activity   |      |       |
|--|------|-------|
| (n=140)  | %    | Index |
| Observe beauty of nature                                   | 75,7 | 130   |
| Hiking (less than two hours)                               | 66,4 | 133   |
| Attend sightseeing tours                                   | 63,6 | 102   |
| Hiking (more than two hours)                               | 61,4 | 143   |
| Relaxation   | 59,3 | 103   |
| Discover local history and legends                         | 59,3 | 137   |
| Visit parks and gardens                                    | 50,7 | 167   |
| Attend concerts/festivals                                  | 24,3 | 165   |
| Experience the wilderness                                  | 50,7 | 162   |
| Salt water fishing   | 22,9 | 141   |
| Experience national festivals and traditional celebrations | 37,9 | 134   |
| Fresh water fishing  | 22,9 | 133   |
| Take part in a course/ educational activity                | 15,0 | 125   |
| <u>Visit national parks</u>                                | 46,4 | 121   |



## **Comparison Sweden vs. Norway (Dutch base)**

|                     | <b>Destination features</b>   |
|---------------------|---|
| Unique to<br>Norway | Has beautiful nature<br>Has attractive mountain areas   |
| Common<br>ground    | Has unspoiled nature Has nature that offers opportunities for discovery Is not too warm Has quiet environments Allows me to live close to nature Is safe Is expencive |
| Unique to<br>Sweden | Has good service  |

|                     | Activities  |
|---------------------|---|
| Unique to<br>Norway | Experience mountains Extreme sport activities Alpine skiing/snowboarding Rafting  |
| Common ground       | Observe beauty of nature Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) Hiking (more than two hours) Experience the wilderness Do winter activities (dog-sleigh, snowmobile etc) |
| Unique to<br>Sweden | Visit national parks Bicikling  |

|                     | <b>Emotional benefits</b>   |
|---------------------|---|
| Unique to<br>Norway | Allows me to discover new and interesting places Helps me escape from a hectic daily life           |
| Common ground       | Gives me a safe feeling Makes me feel completely liberated Restores my sense of harmony and balance |
| Unique to<br>Sweden | Makes me full of energy Allows me to come to my senses  |

|                     | Personality                    |
|---------------------|--------------------------------|
| Unique to<br>Norway | Adventurous                    |
| Common ground       | Active Peaceful Soothing Fresh |
| Unique to<br>Sweden | Sociable Caring                |



#### **Scorecard - Sweden**

| Emotional benefits                               |      |       |  |
|--|------|-------|--|
| (n=135)  | %    | Index |  |
| Gives me a safe feeling                          | 65,2 | 157   |  |
| Helps me to escape from my hectic daily life     | 64,4 | 109   |  |
| Allows me to discover new and interesting places | 60,7 | 93    |  |
| Makes me feel completely liberated               | 59,3 | 141   |  |
| Gives me rich experiences                        | 55,6 | 99    |  |
|  |      |       |  |
| Restores my sense of harmony and balance         | 36,3 | 126   |  |
| Allows me to come to my senses                   | 48,9 | 125   |  |
| Makes me feel full of energy                     | 53,3 | 123   |  |

| Destination features                               |      |       |
|--|------|-------|
| (n=135)  | %    | Index |
| Is not too warm                                    | 88,9 | 166   |
| Has beautiful nature                               | 88,9 | 111   |
| Has quiet environments                             | 85,9 | 136   |
| Is safe  | 85,2 | 128   |
| Has unspoiled nature                               | 85,2 | 126   |
|  |      |       |
| Has environmentally friendly offers                | 39,3 | 202   |
| <u>Is expensive</u>                                | 51,1 | 180   |
| Is not ruined by tourism                           | 73,3 | 162   |
| Has good medical care                              | 77,8 | 150   |
| Is well organized                                  | 74,8 | 148   |
| Allows me to live close to nature                  | 77,8 | 144   |
| Allows me to be physical active                    | 65,2 | 134   |
| Allows me to grow personally                       | 30,4 | 126   |
| Has good service                                   | 62,2 | 124   |
| Has nature that offers opportunities for discovery | 84,4 | 123   |

| Personality       |      |       |
|-------------------|------|-------|
| (n=135)           | %    | Index |
| Relaxed           | 63,7 | 103   |
| Peaceful          | 63,0 | 137   |
| Friendly          | 60,7 | 99    |
| Active            | 57,8 | 111   |
| Adventurous       | 55,6 | 104   |
| Caring            | 35,6 | 144   |
| <u>Fresh</u>      | 46,7 | 142   |
| Structured        | 45,2 | 142   |
| <u>Harmonious</u> | 43,7 | 135   |
| Soothing          | 54,1 | 131   |

| What Brands:Social Identity   |      |       |  |
|---|------|-------|--|
| (n=135)   | %    | Index |  |
| Observe beauty of nature  | 83,0 | 127   |  |
| Hiking (more than two hours)  | 64,4 | 135   |  |
| Relaxation  | 64,4 | 100   |  |
| Hiking (less than two hours)  | 62,2 | 112   |  |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) | 60,7 | 155   |  |
| Do winter activities (dog-sleigh, snowmobile etc)   | 54,1 | 235   |  |
| Cross country skiing  | 33,3 | 198   |  |
| Fresh water fishing   | 36,3 | 189   |  |
| Kayaking/canoeing   | 49,6 | 178   |  |
| Experience wildlife   | 45,9 | 164   |  |
| Experience the wilderness   | 54,8 | 157   |  |
| Salt water fishing  | 25,9 | 143   |  |
| <u>Visit national parks</u>   | 57,8 | 135   |  |
| Sailing   | 26,7 | 128   |  |
| Bicycling   | 35,6 | 121   |  |





## Comparison Switzerland vs. Norway (Dutch base)

|                          | <b>Destination features</b>   |
|--------------------------|---|
| Unique to<br>Norway      | Has beautiful nature Has unspoiled nature Has nature that offers opportunity for discovery Has quiet environments                                       |
| Common<br>ground         | Is not too warm Allows me to live close to nature Has attractive mountain areas Is safe Is expensive Has good medical care                              |
| Unique to<br>Switzerland | Is easy to travel to Has good service Has few language barriers   |
|                          | <b>Emotional benefits</b>   |
| Unique to<br>Norway      | Allows me to discover new and interesting places  |
| Common ground            | Helps me escape from my hectic daily life<br>Gives me a safe feeling<br>Makes me feel completely liberated  |
| Unique to<br>Switzerland | Makes me feel full of energy Allows me to come to my senses Allow me to indulge myself in a bit of luxury Gives me a sense of being well taken care for |

|                          | Activities  |
|--------------------------|---|
| Unique to<br>Norway      | Observe natural phenomenon (i.e. northern lights etc) Experience wilderness Kayaking/canoeing Experience wildlife   |
| Common<br>ground         | Observe beauty of nature Experience mountains Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc) Extreme sports Alpine skiing/snowboarding Cross country skiing Rafting |
| Unique to<br>Switzerland | Hiking (less than two hours)  |
|                          | Personality   |
| Unique to<br>Norway      | Adventurous   |
| Common ground            | Active Peaceful Soothing Fresh  |
| Unique to<br>Switzerland | Luxurious Cultivated Practical  |



#### **Scorecard - Switzerland**

| Emotional benefits                               |      |       |  |
|--|------|-------|--|
| (n=295)  | %    | Index |  |
| Helps me to escape from my hectic daily life     | 65,4 | 117   |  |
| Gives me a safe feeling                          | 59,3 | 152   |  |
| Allows me to discover new and interesting places | 54,9 | 89    |  |
| Gives me rich experiences                        | 49,2 | 93    |  |
| Helps me to enjoy life to the fullest            | 48,5 | 104   |  |
| Makes me feel full of energy                     | 48,5 | 119   |  |
|  |      |       |  |
| Allows me to indulge myself with a bit of luxury | 38,6 | 141   |  |
| Restores my sense of harmony and balance         | 38,3 | 141   |  |
| Gives me a sense of being well cared for         | 36,9 | 139   |  |
| Avoids too much surprises                        | 16,9 | 135   |  |
| Allows me to keep everything under control       | 22,4 | 128   |  |

| %<br>93,9<br>91,2<br>86,1<br>84,7 | Index<br>147<br>116<br>131<br>127                      |
|-----------------------------------|--|
| 93,9<br>91,2<br>86,1<br>84,7      | 147<br>116<br>131                                      |
| 91,2<br>86,1<br>84,7              | 116<br>131   |
| 86,1<br>84,7                      | 131  |
| 84,7                              |  |
| •                                 | 127  |
|                                   | 127  |
| /7,6                              | 277  |
|                                   |  |
| 35,9                              | 271  |
| 77,3                              | 151  |
| 71,9                              | 150  |
| 73,9                              | 148  |
| 72,9                              | 137  |
| 26,1                              | 136  |
| 71,5                              | 135  |
| 63,7                              | 132  |
| 65,4                              | 132  |
| 21,7                              | 128  |
| 46,1                              | 122  |
|                                   | 77,6 35,9 77,3 71,9 73,9 72,9 26,1 71,5 63,7 65,4 21,7 |

| Personality      |      |       |
|------------------|------|-------|
| (n=295)          | %    | Index |
| Active           | 63,7 | 134   |
| Peaceful         | 55,9 | 133   |
| Structured       | 51,9 | 178   |
| Relaxed          | 50,8 | 90    |
| Soothing         | 48,5 | 129   |
|                  |      |       |
| Classy           | 40,7 | 229   |
| <u>Luxurious</u> | 42,4 | 220   |
| Superior         | 15,3 | 177   |
| <u>Fresh</u>     | 45,4 | 152   |
| Cultivated       | 41,7 | 127   |
| <u>Practical</u> | 35,6 | 125   |

| What Brands:Social Identity   |      |       |  |
|---|------|-------|--|
| (n=295)   | %    | Index |  |
| Experience mountains  | 91,2 | 193   |  |
| Observe beauty of nature  | 84,1 | 136   |  |
| Hiking (less than two hours)  | 74,9 | 141   |  |
| Alpine skiing/snowboarding  | 71,5 | 299   |  |
| Hiking (more than two hours)  | 71,2 | 157   |  |
|   |      |       |  |
| Cross country skiing  | 35,9 | 224   |  |
| Do winter activities (dog-sleigh, snowmobile etc)                     | 47,8 | 219   |  |
| Extreme sport activities (mountain climbing, kiting, paragliding etc) | 55,3 | 211   |  |
| Rafting   | 32,9 | 150   |  |
| Fresh water fishing   | 22,4 | 123   |  |



## **Comparison United States vs. Norway (Dutch base)**

|                               | <b>Destination features</b>   |  |  |  |
|-------------------------------|---|--|--|--|
| Unique to<br>Norway           | Has beautiful nature Has unspoiled nature Has nature that offers opportunity for discovery Is not too warm Has quiet environments Allows me to live close to nature |  |  |  |
| Common ground                 | Is well organized   |  |  |  |
| Unique to<br>United<br>States | Has few language barriers Has good shopping Offers a wide range of possible activities Allows me to have unique experiences   |  |  |  |

|                            | Activities  |
|----------------------------|---|
| Unique to<br>Norway        | Observe beauty of nature Experience mountains Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc)        |
| Common<br>ground           | Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) Experience wilderness Rafting |
| Unique to<br>United States | Hiking (less than two hours)  |

|  |                         | <b>Emotional benefits</b>   |  |
|--|-------------------------|---|--|
|  | Unique to<br>Norway     | Allows me to discover new and interesting places Helps me escape from my hectic daily life Gives me a safe feeling Makes me feel completely liberated |  |
|  | Common ground           | Makes me stand out from the crowd   |  |
|  | Unique to United States | Allow me to indulge myself in a bit of luxury Makes me feel on top of the world   |  |

|                            | Personality                       |
|----------------------------|-----------------------------------|
| Unique to<br>Norway        | Active Peaceful Soothing Fresh    |
| Common ground              | Adventurous                       |
| Unique to<br>United States | Contemporary Explorative Outgoing |



#### **Scorecard - United States**

| S  |      |       |
|--|------|-------|
| Emotional benefits                               |      |       |
| (n=238)  | %    | Index |
| Allows me to discover new and interesting places | 68,9 | 94    |
| Enriches my view on the world                    | 66,0 | 108   |
| Gives me rich experiences                        | 66,0 | 104   |
| Allows me to broaden my horizon                  | 61,8 | 107   |
| Allows me to broaden my knowledge                | 60,5 | 102   |
| Shows that I am successful in life               | 12,6 | 216   |
| Makes me feel sophisticated                      | 10,5 | 177   |
| Makes me feel on top of the world                | 33,6 | 170   |
| Allows me to impress other people                | 9,7  | 148   |
| Allows me to show my superior lifestyle          | 6,7  | 137   |
| Allows me to indulge myself with a bit of luxury | 44,5 | 136   |
| Makes me feel special                            | 25,6 | 125   |
| Makes me stand out from the crowd                | 23,1 | 121   |
| Destination features                             |      |       |
| (n=238)  | %    | Index |
| Has few language barriers                        | 82,8 | 168   |
| Has interesting sights                           | 81,1 | 106   |
| Has beautiful nature                             | 79,8 | 99    |
| Has good shopping                                | 78,2 | 179   |
| Offers a wide range of possible activities       | 77,3 | 121   |
| Is an upper class destination                    | 23,9 | 177   |
| Has a lot of bars                                | 42,9 | 140   |
| Is well organized                                | 68,5 | 134   |
| Is not for just anybody, is exclusive            | 22,7 | 131   |
| Allows me to have unique experiences             | 71,8 | 125   |
| Is easy to travel around                         | 68,9 | 125   |
| Has lots of organized trips and excursions       | 51,3 | 124   |
| Has a variety of different restaurant offers     | 41,6 | 122   |
| Allows me to grow personally                     | 29,4 | 121   |
| Has places to go out partying                    | 46,6 | 121   |

| Personality  |      |         |  |
|--|------|---------|--|
| (n=238)  | %    | Index   |  |
| Adventurous  | 53,8 | 111     |  |
| Friendly   | 47,5 | 86      |  |
| Active   | 46,6 | 99      |  |
| Contemporary   | 45,0 | 130     |  |
| Structured   | 41,6 | 144     |  |
|  |      |         |  |
| Extravagant  | 29,4 | 322     |  |
| Outgoing   | 38,2 | 307     |  |
| Superior   | 24,8 | 290     |  |
| Crazy  | 23,5 | 201     |  |
| Luxurious  | 31,9 | 167     |  |
| Generous   | 24,8 | 157     |  |
| <u>Explorative</u>   | 39,5 | 133     |  |
| Naughty  | 14,7 | 132     |  |
| Open-minded  | 31,9 | 131     |  |
| Daring   | 25,6 | 131     |  |
| Classy   | 21,8 | 124     |  |
| Playful  | 21,4 | 121     |  |
| Practical  | 34,0 | 121     |  |
| What Brands:Social Identity  |      |         |  |
| (n=238)  | %    | Index   |  |
| Visit national parks   | 85,3 | 161     |  |
| Attend sightseeing tours   | 76,5 | 89      |  |
| Shopping   | 73,9 | 153     |  |
| Visit cities   | 73,1 | 105     |  |
| Observe beauty of nature   | 68,1 | 85      |  |
|  |      |         |  |
| Visit amusement parks  | 67,2 | 323     |  |
| Visit or take part in sports events  | 37,8 | 234     |  |
| Attend concerts/festivals  | 38,2 | 189     |  |
| Experience wildlife  | 63,4 | 183     |  |
| Attend theatre, ballet, opera performances   | 33,6 | 165     |  |
| Workout in gym/fitness centre  | 23,9 | 162     |  |
| Experience city nightlife  | 42,0 | 146     |  |
| Experience the wilderness  | 60,5 | 141     |  |
| Visit art exhibitions  | 39,5 | 137     |  |
| Rafting  | 37,0 | 130     |  |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, | 60,9 | 126     |  |
| sand dune)   |      |         |  |
| •  | יףי  | 202 141 |  |



# C) Overall positioning & targeting

Holiday types



# Segments share of occasion – all markets - all destinations

|   | Liberation | Sharing Good<br>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 %        |

## **Ipsos MMI**



# Segments share of occasion – Holland - all destinations

|   | Liberation | Sharing<br>Good Times | Togetherness | Harmony | Routine | Broadening<br>your<br>horizon | Luxury | Exploration |
|---|------------|-----------------------|--------------|---------|---------|-------------------------------|--------|-------------|
| Ski holiday   | 63 %       | 2 %                   | 11 %         | 2 %     | 9 %     | 1 %                           | 0 %    | 13 %        |
| Visiting friends and relatives                            | 13 %       | 10 %                  | 21 %         | 1 %     | 5 %     | 29 %                          | 2 %    | 19 %        |
| Hiking holiday  | 39 %       | 1 %                   | 14 %         | 2 %     | 2 %     | 19 %                          | 0 %    | 22 %        |
| Fishing holiday   | 75 %       | 4 %                   | 1 %          | 0 %     | 0 %     | 0 %                           | 0 %    | 19 %        |
| Sightseeing/round trip                                    | 8 %        | 5 %                   | 14 %         | 1 %     | 4 %     | 39 %                          | 1 %    | 28 %        |
| Active holiday (golf, rafting, biking etc)                | 40 %       | 8 %                   | 14 %         | 3 %     | 2 %     | 9 %                           | 0 %    | 23 %        |
| City trip/city break                                      | 14 %       | 7 %                   | 11 %         | 2 %     | 3 %     | 46 %                          | 0 %    | 17 %        |
| Cruise holiday  | 3 %        | 6 %                   | 23 %         | 4 %     | 7 %     | 48 %                          | 0 %    | 9 %         |
| Sun and beach holiday                                     | 11 %       | 8 %                   | 48 %         | 4 %     | 8 %     | 13 %                          | 0 %    | 7 %         |
| Camping holiday   | 27 %       | 4 %                   | 40 %         | 0 %     | 7 %     | 10 %                          | 0 %    | 12 %        |
| Cottage holiday (hired/own/borrowed cottage/holiday home) | 18 %       | 3 %                   | 39 %         | 2 %     | 15 %    | 18 %                          | 0 %    | 5 %         |
| Holiday to experience nature, scenery and wildlife        | 20 %       | 0 %                   | 23 %         | 0 %     | 2 %     | 16 %                          | 0 %    | 39 %        |
| Short trips/extended weekend trips                        | 16 %       | 8 %                   | 30 %         | 6 %     | 8 %     | 25 %                          | 0 %    | 7 %         |
| Backpacking   | 2 %        | 3 %                   | 12 %         | 0 %     | 3 %     | 48 %                          | 0 %    | 33 %        |
| Summer holiday/main holiday/annual                        |            |                       |              |         |         |                               |        |             |
| leave   | 18 %       | 8 %                   | 32 %         | 1 %     | 2 %     | 23 %                          | 0 %    | 16 %        |
| Total   | 13 %       | 10 %                  | 21 %         | 1 %     | 5 %     | 29 %                          | 2 %    | 19 %        |

## **Ipsos MMI**



## Ski holiday – Dutch tourists

N=229





- 5W profile
- Motivations for skiing
- Role of Norway versus competitive landscape
  - destination versus motivation within ski holiday
  - Who is coming today?

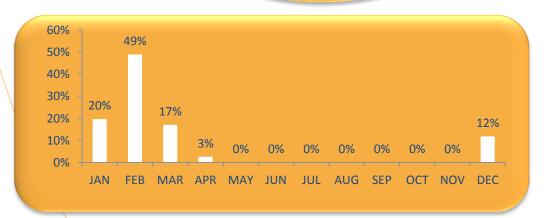




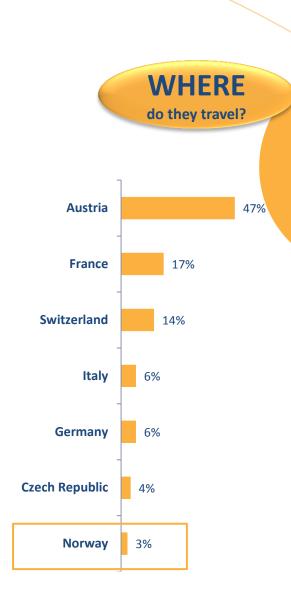
#### **DEMOGRAPHICS**

- Dominated by people aged 40-49 (33%). 30-59 constitutes 71%
- More relevant for men (63%)
- 53% of the travelers have a household income of 50.000 Euros or more.
   12% makes 100.000 Euro's per year or more

# WHEN do they travel?



Average length of stay: 8 days





## **HOW**

do they travel?

#### **ACCOMODATION**

- Mostly rented or borrowed cabin / holiday home / flat (45%)
  - Hotel medium standard (24%)

#### TRAVEL TO DESTINATION

- Dominated by car (77%)
  - Bus (16%)

#### **WITH WHOM**

- Spouse/partner (59%)
- Any children (50%)
  - Friends (38%)
- Other family/relatives (34%)

#### **PLANNING & ORGANISATION**

Mostly organized individually





## WHY

do they travel?

#### **EMOTIONAL BENEFITS**

- · Allows me to share good times with others
  - · Helps me escape from my hectic daily life
    - · Makes me feel full of energy
    - Helps me enjoy life to the fullest
  - Makes me feel completely liberated

## **PERSONALITY**

- Active
- Relaxed
- Friendly
- Fresh
- Adventurous

## **WHAT**

are they looking for?

### **PRODUCT CHARACTERISTICS**

- Has attractive mountain areas
- Allows me to be physical active
  - Has beautiful nature
  - Is easy to travel to
  - Has unspoiled nature

#### **ACTIVITIES**

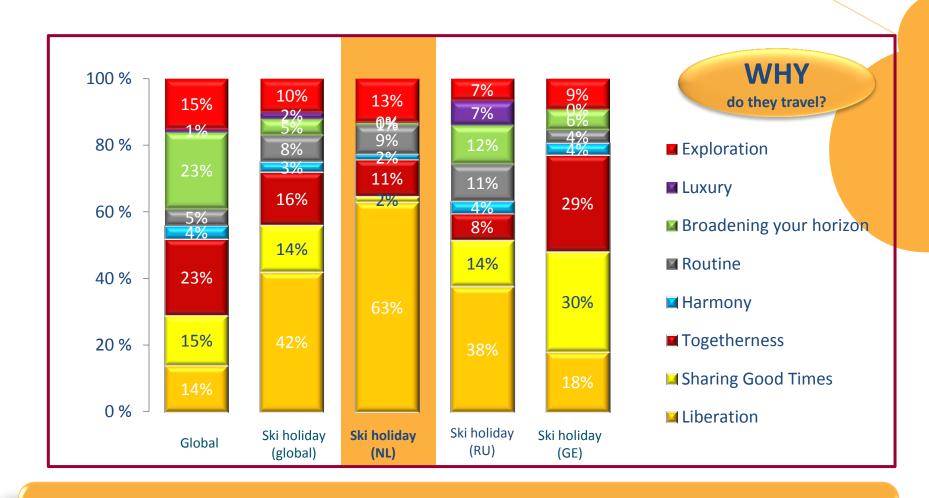
- Experience mountains
- Alpine skiing/snowboarding
  - Relaxation
- Observe beauty of nature
  - Visit restaurants

Slide shows most important items

Bold = differentiating from other holiday types



## Why do Dutch go on a ski holiday?



#### **CONCLUSION:**

Liberation is the dominant motivation to go skiing.

**Ipsos MMI** 



Liberation

Freeing yourself completely of all daily hassles

#### Why?

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

#### **Key competition**

- THE ALPS
- Mainly Austria

#### **Leveraging brand Norway**

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



## Sightseeing/roundtrip – Dutch tourists

N = 561





- 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



## Sightseeing/roundtrip Details



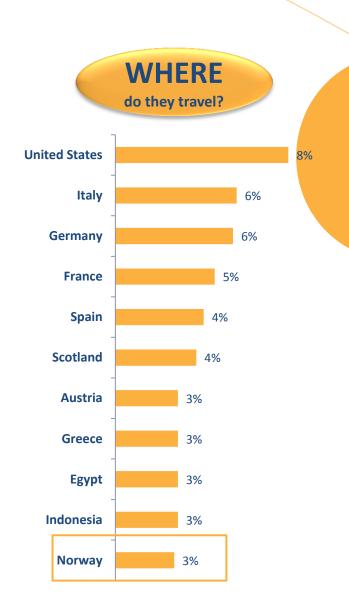
#### **DEMOGRAPHICS**

- Dominated by 50-65 (59%)
- High education (42%)
- 42% of the travelers have a household income of 50.000 Euros or more. 8% makes 100.000 Euro's per year or more.

## WHEN do they travel?



Average length of stay: 16 days



## Ipsos MMI



## **HOW**

do they travel?

#### **ACCOMODATION**

- Almost exclusively hotels (89%)
- Mostly medium standard (55%)

Mostly with spouse/partner (70%)

**WITH WHOM** 

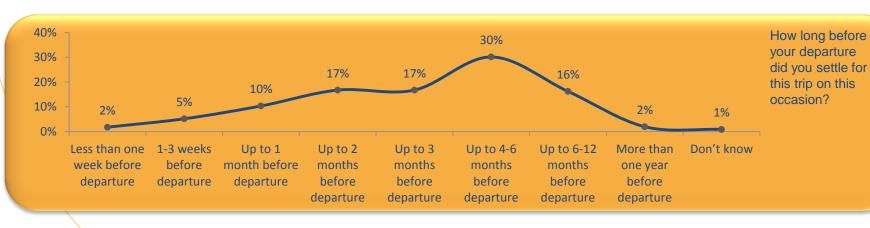
- Friends (18%)
- Less with children

#### TRAVEL TO DESTINATION

- Mostly car (43%) and scheduled plane (38%)
  - Bus (20%)
  - Chartered plane (19%)

#### **PLANNING & ORGANISATION**

- More organized on their own (51%)
- Also often organized group tours (33%)



### WHY

do they travel?

#### **EMOTIONAL BENEFITS**

- · Allows me to discover new and interesting places
  - · Enriches my view on the world
    - Gives med rich experiences
  - · Allows me to broaden my knowledge
    - Allows me to broaden my horizon

#### **PERSONALITY**

- Relaxed
- Friendly
- Adventurous
  - Active
  - Unique

## WHAT

are they looking for?

#### **PRODUCT CHARACTERISTICS**

- Has interesting sights
  - Has beautiful nature
  - Has friendly people
  - Has unspoiled nature
- Has nature that offers opportunities for discovery

#### **ACTIVITIES**

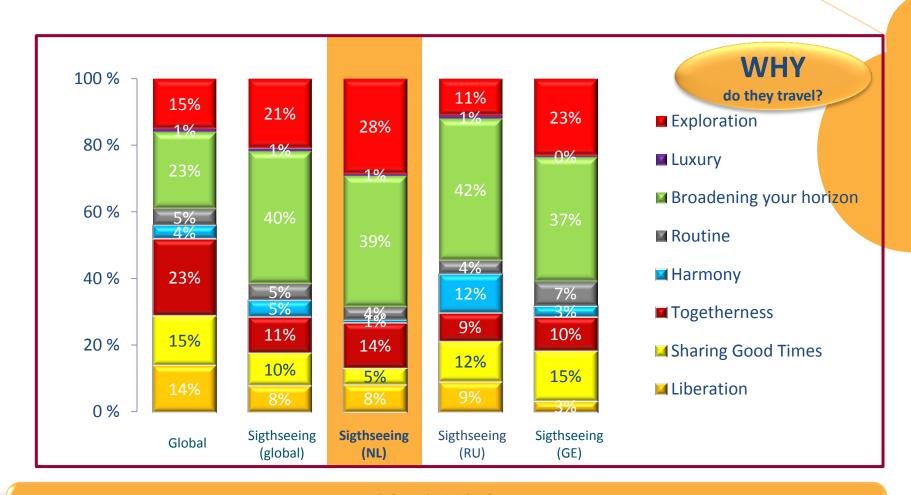
- Attend sightseeing tours
- Observe beauty of nature
- Discover local culture and lifestyle
  - Visit historical buildings/sites
    - Relaxation

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 motivation in Holland is Exploration. Broadening your horizon dominates in all markets.



## **City trip/city break – Dutch tourists**

N=208





- 5W profile
- Motivations for City trip
- Role of Norway versus competitive landscape
  - destination versus motivation within City trip
  - Who is coming today?





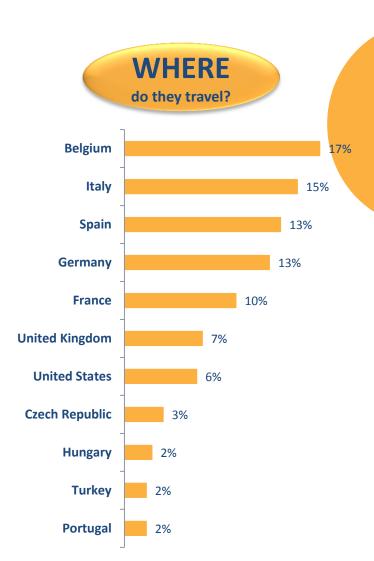
#### **DEMOGRAPHICS**

- Dominated by people aged 40-59 (53%)
- People 30-65 years constitutes 84% of the travelers
- Slightly more females (53%)
- 43% 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: 6 days





## **HOW**

do they travel?

#### **ACCOMODATION**

 Hotel accommodation 87% share (medium standard 56%)

#### TRAVEL TO DESTINATION

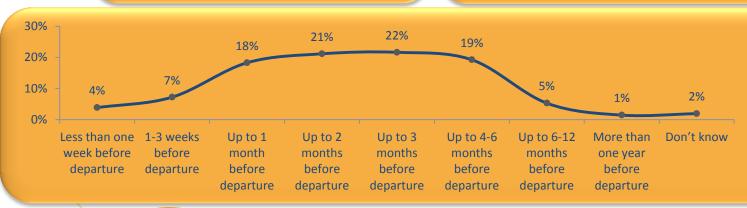
- Dominated by scheduled plane (39%) and car (38%)
  - Train (20%)

#### **WITH WHOM**

- Spouse/partner (62%)
  - Friends (25%)
  - Less with children

# 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 knowledge
  - Allows me to share good times with others
    - Gives me rich experiences
    - · Enriches my view on the world

## **PERSONALITY**

- Relaxed
- Friendly
- Active
- Contemporary
  - Cultivated

## **WHAT**

are they looking for?

#### **PRODUCT CHARACTERISTICS**

- Has interesting sights
- Has interesting culture & art
  - Is easy to travel to
  - · Has good shopping
  - Has rich cultural heritage

#### **ACTIVITIES**

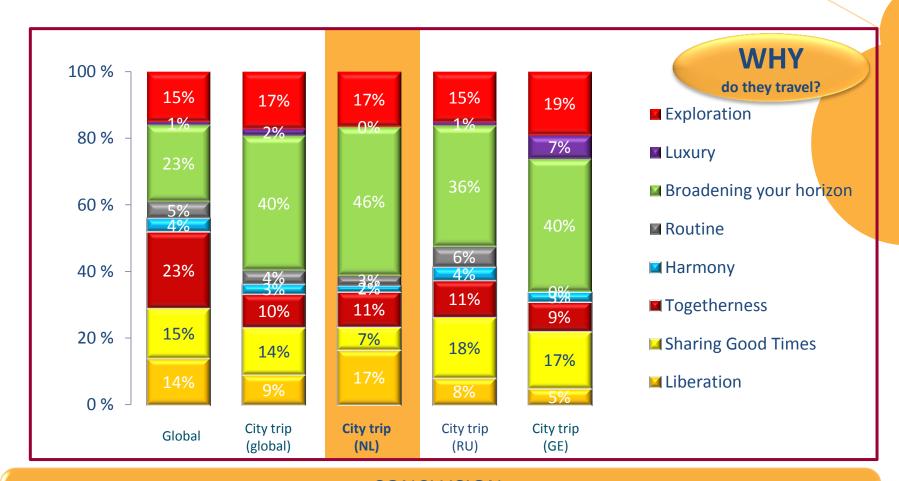
- Attend sightseeing tours
  - Visit cities
  - Visit restaurants
- Visit historical buildings/sites
  - Shopping

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 and Liberation plays a more important role.



## **Holiday to experience nature – Dutch tourists**

N= 142





- 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?



## Holiday to experience nature Details



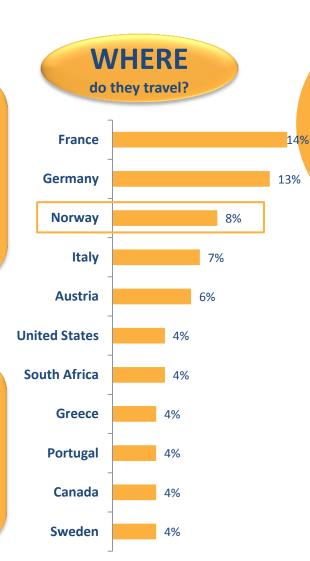
#### **DEMOGRAPHICS**

- Dominated by people aged 40-59 (56%)
- People 30-65 years constitutes 93% of the travelers
- Slightly more males (54%)
- 33% 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: 15 days





## Holiday to experience nature Details

## **HOW**

do they travel?

#### **ACCOMODATION**

- Hotel medium standard (33%)
- Rented or borrowed cabin / holiday home / flat (29%)

#### TRAVEL TO DESTINATION

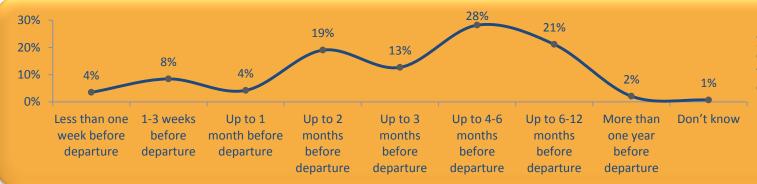
- Dominated by car (73%)
- Scheduled plane (25%)

#### **WITH WHOM**

- Spouse/partner (77%)
  - Any children (35%)

### **PLANNING & ORGANISATION**

Mostly self organized



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

## Holiday to experience nature Details

### WHY

do they travel?

#### **EMOTIONAL BENEFITS**

- · Allows me to discover new and interesting places
  - Gives me rich experiences
  - Helps me to enjoy life to the fullest
  - Helps me escape for my hectic daily life
  - Enriches my view on the world

## **PERSONALITY**

- Relaxed
- Active
- Adventurous
  - Friendly
  - Unique

## **WHAT**

are they looking for?

### **PRODUCT CHARACTERISTICS**

- Has beautiful nature
- Has nature that offers opportunities for discovery
  - Has unspoiled nature
  - · Allows me to live close to nature
    - Has Friendly people

#### **ACTIVITIES**

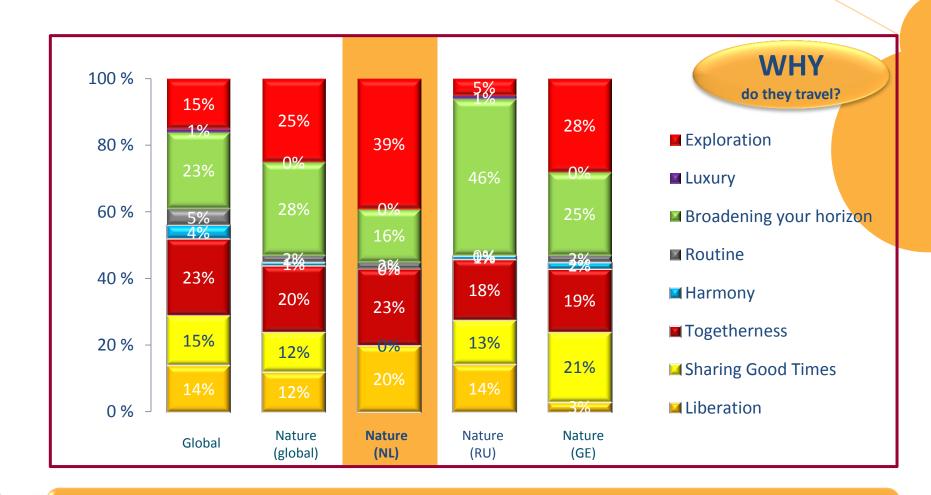
- Observe beauty of nature
  - Relaxation
- Hiking (less than two hours)
  - Attend sightseeing tours
  - Experience mountains

Slide shows most important items

Bold = differentiating from other holiday types



## Why do people go on a Holiday to experience nature?



#### **CONCLUSION:**

Exploration is the dominant segment, togetherness is the other important segment.



## **Camping holiday – Dutch tourists**

N= 300





- 5W profile
- Motivations for Camping holiday
- Role of Norway versus competitive landscape
  - · destination versus motivation within Camping
  - Who is coming today?

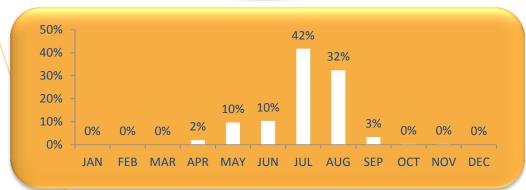




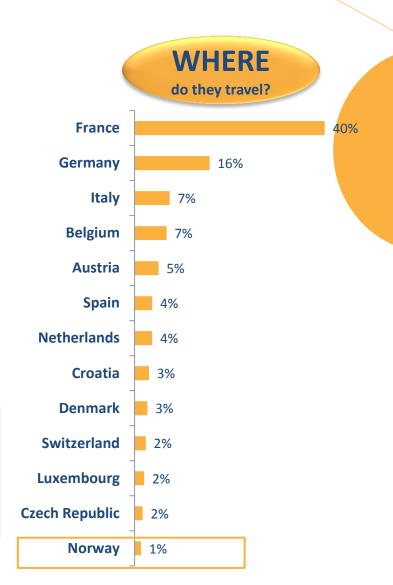
#### **DEMOGRAPHICS**

- Dominated by people above 30 (91%)
- People 40-65 years constitutes 70% of the travelers
- 31% 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: xx days





## **HOW**

do they travel?

#### **ACCOMODATION**

- Tent (48%)
- Caravan/camper van (47%)

### TRAVEL TO DESTINATION

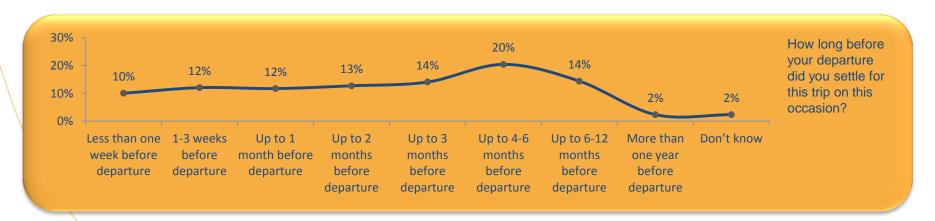
- Car dominates (64%)
- Car with caravan (28%)

#### **WITH WHOM**

- Spouse/partner dominates (89%)
  - Children aged 0-14 (51%)

#### **PLANNING & ORGANISATION**

• Almost exclusively people who organized the trip themselves (96%)



## WHY

do they travel?

#### **EMOTIONAL BENEFITS**

- Helps me to escape from my hectic daily life
- Creates precious moments of togetherness
- Allows me to discover new and interesting places
  - Allows me to share good times with others
    - Helps me to enjoy life to the fullest

## **PERSONALITY**

- Relaxed
- Friendly
  - Active
- Sociable
- Soothing

## **WHAT**

are they looking for?

#### **PRODUCT CHARACTERISTICS**

- Has beautiful nature
- Is easy to travel to
- Has interesting sights
- Is easy to travel around
  - Has friendly people

#### **ACTIVITIES**

- Relaxation
- Attend sightseeing tours
- Observe beauty of nature
- Hiking (less than two hours)
  - Visit cities

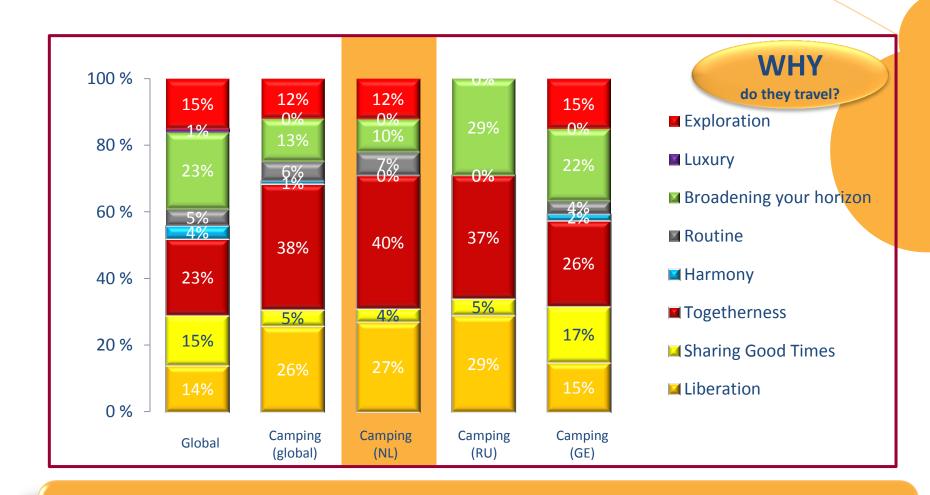
Slide shows most important items

Bold = differentiating from other holiday types

**Ipsos MMI** 



## Why do people go on a Camping Holiday?



## **CONCLUSION** (low bases for Russia):

Together dominates as a motivation with Liberation and Exploration following in The Netherlands.



## **Cottage holiday – Dutch tourists**

N = 294





- 5W profile
- Motivations for cottage holiday
- Role of Norway versus competitive landscape
  - destination versus motivation within cottage holiday
  - Who is coming today?

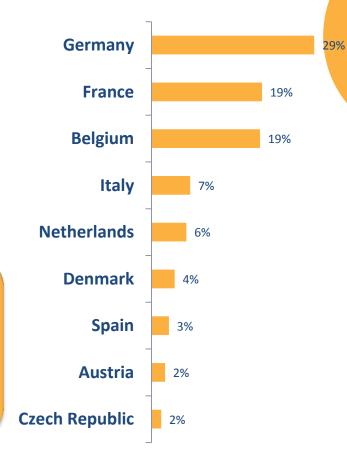


## WHO travels

#### **DEMOGRAPHICS**

- Dominated by people aged 30-59 (78%)
- Middle education (Secondary vocational)
- Married with children (57%)
- 47% of the travelers have a household income of 50.000 Euros or more. 5% makes 100.000 Euro's per year or more

#### **WHEN** do they travel? 25% 20% 18% 20% 14% 15% 12% 10% 6% 3% 3% 2% 2% 5% AUG MAR APR MAY JUN JUL SEP DEC



**WHERE** 

do they travel?

Average length of stay: 10 days



## **HOW**

do they travel?

#### **ACCOMODATION**

Rented or borrowed cabin / holiday home / flat

#### TRAVEL TO DESTINATION

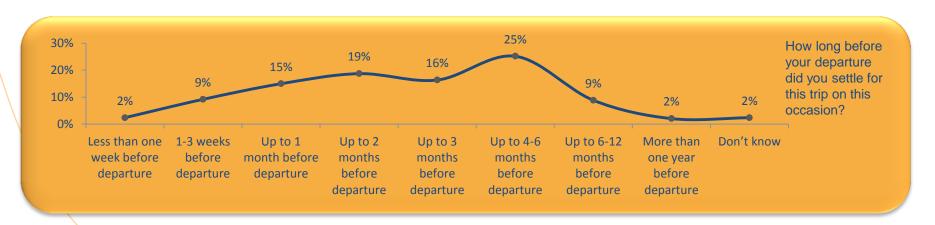
• Dominated by car (96%)

#### **WITH WHOM**

- Spouse/partner (84%)
- Children 0-6 (34%)
- Children 7-14 (27%)
- Other family/relatives (25%)

#### **PLANNING & ORGANISATION**

Almost exclusively organized by themselves



## WHY

do they travel?

#### **EMOTIONAL BENEFITS**

- Helps me to escape from my hectic daily life
  - Allows me to share good times with others
- Creates precious moments of togetherness
- Allows me to intensify the relationship with my loved one(s)
  - · Allows me to discover new and interesting places

## **PERSONALITY**

- Relaxed
- Friendly
- Peaceful
- Soothing
  - Cozy

## **WHAT**

are they looking for?

#### **PRODUCT CHARACTERISTICS**

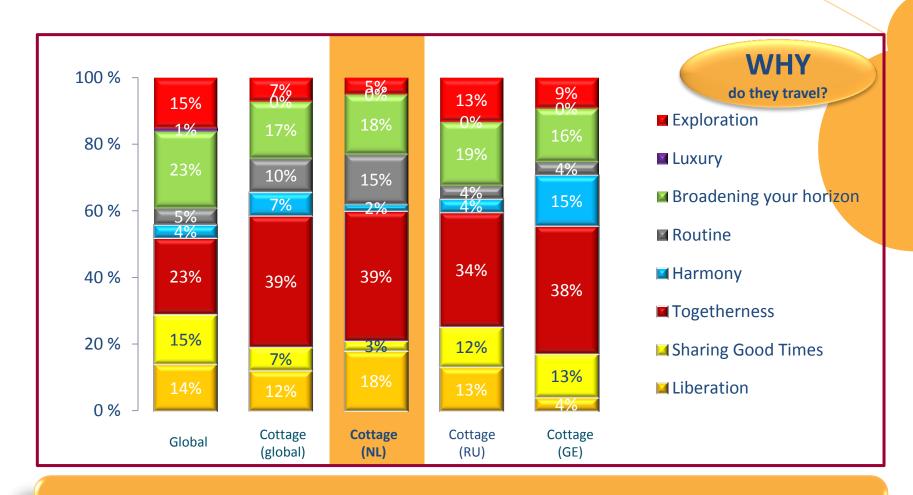
- Is easy to travel to
- Has beautiful nature
  - Is safe
- Is easy to travel around
- Has quiet environments

### **ACTIVITIES**

- Relaxation
- Attend sightseeing tours
- Observe beauty of nature
  - Visit restaurants
- Hiking (less than two hours)



## Why do people go on a Cottage holiday?



### CONCLUSION

Togetherness dominates as motivation. Broadening your horizon and Exploration/Liberation follows. Some differences in the markets – routine is rather big in The Netherlands





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