ACTIVATING THE NORWAY BRAND

A Global report on holiday needs and segments for Innovation Norway

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The vision is «we give local ideas global opportunities»

Norway has unique advantages both in terms of natural resources and modern infrastructure that provides a great number of possibilities for tourists.

Innovation Norway manages not only one brand but the sum of all the brands that make up the destination Norway.

Some of these are iconic brands on a global scale.

The challenge is to secure a strong position for all of these so that the sum is stronger than individual parts, creating truly global power.
The world is changing. The travel industry is changing. People change. How they interact with brands is changing. Their behavior in relation to vacation change.

You may have to adapt and make changes in the strategy to keep pace with the market.

Fundamental consumer insights in key markets is part of the basis for this.
THE PURPOSE OF THE RESEARCH:

TO IDENTIFY THE BEST MEANS OF STRENGTHENING THE FUTURE OF THE NORWEGIAN TRAVEL INDUSTRY

TO UNDERSTAND THE COMPETITIVE LANDSCAPE AND TARGET NEEDS TO PROMOTE INNOVATION AND COMMUNICATION

In order to do so, this research provides answers to the two questions:
- What is the ideal holiday?
- How are destinations (brands) positioned?
1
THE PHILOSOPHY
BEHIND THE RESEARCH
Point of view & approach
At the Heart of Growing Brands is an understanding of how **PEOPLE** make **CHOICES**

And with increasing Brand Choices, it is more important than ever before to understand how the decision process works in people’s minds.

Brands that grow are brands that are chosen by...

**MORE PEOPLE**

**MORE EASILY**

**MORE OFTEN**

**SO HOW CAN INNOVATION NORWAY MAKE IT EASIER FOR MORE PEOPLE TO COME TO NORWAY MORE OFTEN?**
THE KEY TO BRAND BUILDING
IS TO THINK PEOPLE FIRST

**HOW PEOPLE MAKE DECISIONS**

Decision-making is often more unconscious than conscious, using mental shortcuts to reduce effort.

**HOW PEOPLE THINK ABOUT BRANDS**

Brands exist in peoples’ minds as a network: a unique memory structure of thoughts, feelings, experiences, images, stories, associations, colours, sounds, symbols and memories.

**HOW PEOPLE ARE INFLUENCED**

Memory salience refers to all the existing aspects of the brand’s mental network. Attention salience is about the cues and stimuli that capture our attention at any touchpoint.

SO HOW DO PEOPLE MAKE CHOICES?
They must come readily to mind in the moments that matter. They have strong brand networks or associative memory structures so they are easily retrieved in a fast-processing, automatic decision environment.

They must be accessible (e.g. pricing, distribution). The more easily people perceive that they can obtain one option rather than another similar option, the more likely it is to be selected.

They must have the highest perceived value at the moment of choice, compared with alternatives.
BUILDING DEEP BRAND RELATIONSHIPS WITH CENSYDIAM

Censydiam offers a **validated approach** to understand the different roles brands can play in the category.

Censydiam captures the **needs & motivations** that drive relevance in the category, while acknowledging that these needs & motivations can differ across various situations and occasions.

Brands can **grow** if they succeed in connecting themselves to more emotional & functional needs.
CENSYDIAM IN A NUTSHELL

Theories about the unconscious mind and the mechanisms of release and repression

The double mechanism for satisfaction: a striving for power & superiority and for belonging & community

Each is deconstructed on key emotional and functional benefits, brands need deliver on in order to be relevant for consumers in various usage occasions/situations.

These benefits help build rich networks and allow consumers to easily identify the best solutions for their needs.

People first
All decisions are made with fundamental consumer needs at the heart

Universal
Comparison possible across markets

Customizable
Needs are tailored by context, category and markets.

Validated
Over 30+ years experience across the globe & scientific thesis

Comparison
Allows comparison over time and markets
CENSYDIAM SEEKS TO UNCOVER THE DIFFERENT DRIVERS THE BRAND NEEDS TO PLAY ON TO BE RELEVANT

First we uncover the ideal benefits sought in a specific holiday. Then we uncover what associations travelers have to different destinations.

**DESTINATION CHARACTERISTICS**

- **WHAT expectations are related to destinations?**
- **HOW should a holiday reflect upon me?**
- **WHY do people go on holiday?**
- **WHAT should the destination stand for?**

**SOCIAL IDENTITY**

- **WHO is the destination for?**
- **WHY do I go to this destination?**

**EMOTIONAL BENEFITS**

- **WHAT qualities does this destination have?**
- **WHAT does this destination stand for?**

**BRAND PERSONALITY**
THE SAME PERSON, BUT DIFFERENT SITUATIONS AND DIFFERENT MOTIVATIONS

As consumers, we often have different needs depending on the situation. This also applies to holidays. A weekend getaway with a partner has to fulfil different needs than a skiing weekend with friends. This report is, therefore, based on different occasions – by occasion we mean different holidays. Each respondent has told us what the ideal holiday look like on two different holiday occasions.
1. We start with the Censydiam model and explore it qualitatively in focus groups.

2. The qualitative part then creates a hypothesis on how the Censydiam frame looks like within the holiday category.

3. At this stage this hypothesis have been tested quantitatively in several markets to create one global segmentation model.
QUESTIONNAIRE STRUCTURE IN THE QUANTITATIVE INTERVIEW

Section 1: Demographics and Screener
- Gender
- Age
- Income
- Etc.
- Have been abroad for holiday last 3 years.

Section 2: Category use
- How often do you go on holiday abroad?
- Where did you go the last 5 holidays?
- Time of year, duration and type of holiday

Section 3: Kategoribruk
- What destinations do you know of?
- How many times have you been on holiday to the following countries?

Section 4: Profiling of two holiday occasions
- Type of holiday
- Destination
- Duration
- Who were you with?
- Spending
- Accommodation
- Transport
- Information sources
- Influencers
- Activities
- Consideration set (what destinations would you consider).

Section 5: Profiling of 2 holiday occasions
- Emotional benefits
- Functional benefits
- Personality
- Social identity

Section 6: Profiling of destinations
- Please choose the statements that you think are appropriate for each destination. We use the same statements as in section 5.
HOW DOES THE NEEDS COME ALIVE IN THE ACTUAL INTERVIEW?

The needs are formulated as statements on 4 levels

Emotional benefits

- Helps me to enjoy life to the fullest
- Makes me feel completely liberated
- Helps me to escape from my hectic daily life
- Restores my sense of harmony and balance
- Allows me to keep everything under control
- Helps me to avoid too much surprises
- Gives me rich experiences
- Gives me new inspiration

Functional benefits

- Allows me to be physical active
- Allows me to live close to nature
- Has a variety of accommodation offers
- Has a variety of different restaurant offers
- Has activities for kids
- Has a variety of different accommodation offers
- Has environmentally friendly offers
- Has few language barriers
- Has friendly people
- Has good beaches
- Has good local cuisine
- Has good medical care
- Has good opportunities to meet local people
- Has good service
- Has good shopping
- Has guaranteed sunshine
- Has interesting culture & art
- Has interesting sights
- Has lots of organized trips and excursions
- Has places to go out partying
- Has quiet environments
- Has rich cultural heritage
- Has romantic spots
- Has unspoiled nature
- Is easy to travel around
- Is easy to travel to
- Is not for just anybody, is exclusive
- Is not ruined by tourism
- Is not too warm
- Is well organized
- Offers a wide range of possible activities
- Good value for money

Personality

- Active
- Playful
- Fresh
- Open-minded
- Sociable
- Outgoing
- Caring
- Friendly
- Cozy
- Harmonious
- Peaceful
- Relaxed
- Practical
- Structured
- Predictable
- Authentic
- Unique
- Cultivated
- Extravagant
- Superior
- Classy
- Explorative
- Adventurous
- Daring

Social identity

- People who want to have as much fun as possible in life
- People that like to do things spontaneously, impulsively
- People who likes to party
- People who are always looking to connect with others
- People who enjoy spending time with friends
- People who have an active and busy social life
- People for whom family comes first above all
- People who enjoy taking care of others
- People who have strong family values
- People who want to escape from the demands of life and relax and unwind
- People who needs time for themselves
- People who want to revitalize themselves
- People who make rational choices
- People who prefer the familiar over the unknown
- People who avoid risk
- People who are interested to learn more
- People who want to make a different choice
- People that like to do things the unconventional way
- People who want the best and are willing to pay for it
- People who like to have the best things, value high quality
- People who is sophisticated and classy
- People who like to explore and have new experiences
- People who like adventure
- People who wants a life changing experience

Imagine that you would go on a similar holiday in the future (with the same people, the same destination, the same time, etc.), please tick the feelings and needs the ideal holiday experience should meet for this occasion

Which are the qualities and characteristics the holiday experience would ideally need to have for this occasion?

Please tick the words that fit the character of your IDEAL future holiday experience for this occasion

Which of the following types of people would you expect to look for the same holiday experience as you?
THE IDEAL HOLIDAY EXPERIENCE

Global category needs

Potential needs and drivers
Holidays abroad

Main drivers globally
### WHY do people go on holiday?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Count</th>
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<tbody>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>182</td>
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<tr>
<td>Gives me rich experiences</td>
<td>168</td>
</tr>
<tr>
<td>Allows me to share good times with others</td>
<td>164</td>
</tr>
</tbody>
</table>
IDEAL DESTINATION CHARACTERISTICS

WHAT expectations are related to specific destination characteristics?

<table>
<thead>
<tr>
<th>Has interesting sights</th>
<th>187</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has beautiful nature</td>
<td>184</td>
</tr>
<tr>
<td>Good value for money</td>
<td>175</td>
</tr>
<tr>
<td>Has friendly people</td>
<td>173</td>
</tr>
<tr>
<td>Is easy to travel to</td>
<td>151</td>
</tr>
<tr>
<td>Has good local cuisine</td>
<td>149</td>
</tr>
<tr>
<td>Has rich cultural heritage</td>
<td>146</td>
</tr>
</tbody>
</table>
WHAT should the destination stand for?

IDEAL BRAND PERSONALITY

Relaxed: 226
Friendly: 190
Cozy: 152
IDEAL SOCIAL IDENTITY

HOW should a holiday reflect upon me?

- People who like to explore and have new experiences: 201
- People who are interested to learn more: 170
- People who want to escape from the demands of life: 170
- People who enjoy spending time with friends: 167
THE WAY AHEAD FOR NORWAY TO MEET GENERIC CATEGORY EXPECTATIONS

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

**Strengthen the emotional benefits**
- Allows me to discover new and interesting places
- Allows me to share good times with others
- Gives me rich experiences

**Personality associations are slim**
- Relaxed
- Cozy
- Friendly

**Develop destination features**
- Has beautiful nature
- Has friendly people
- Has good local cuisine
- Has interesting sights
- Has rich cultural heritage
- Good value for money
- Is easy to travel to (except Sweden and Denmark)

**Weak social identity**
- People who like to explore and have new experiences (weak in Sweden and Denmark)
- People who want to escape from the demands of life and relax and unwind (strong in Denmark already)
- People who enjoy spending time with friends (strong in Denmark already)
- People who are interested to learn more (strong in US and UK already)
CATEGORY

BEHAVIOR

With whom, how, when...
WHEN, WHO, HOW, WHERE

Highlights on global category behavior

WHEN

People travel all year long
- Off course some peaks in summertime

WITH WHOM

66%
Spouse/partner

HOW

57%
I/we organized the trip myself/ourselves and travelled independently

TYPE OF ACCOMODATION

74%
Lived at a hotel, in most cases a medium standard hotel

TRANSPORTATION

64%
Came by plane

TRANSPORTATION DURING THE HOLIDAY

- Bus 28%
- Rented car 25%
- Plane 15%
- Train 12%
SOURCES OF INFORMATION BEFORE AND DURING TRAVEL

The digital channels are most important

- 66% Uses the internet in general as a source of information and inspiration before going on holiday. I.e. the large search engines are highly important to direct traffic to sites that present Norway as a tourist destination.
- 20% Advice from friends / family
- 17% Guidebooks
- 30% Uses the homepage of the destination as a source of information and inspiration before going on holiday
- 18% Uses the homepage of carriers, including airlines etc.
- 27% Uses the homepage for hotels/ other accommodations
- 21% Uses the homepage for attractions and sights
- 15% Uses booking sites such as Expedia and Lastminute

Base: all respondents, n=12,000
MOST TRAVELS ARE DECIDED UPON BETWEEN 1-6 MONTHS IN ADVANCE

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

- More than one year before departure: 1%
- Up to 6-12 months before departure: 9%
- Up to 4-6 months before departure: 19%
- Up to 3 months before departure: 16%
- Up to 2 months before departure: 18%
- Up to 1 month before departure: 16%
- 1-3 weeks before departure: 12%
- Up to 6-12 months before departure: 6%
- Less than one week before departure: 6%

«Influence period 10%»
«Main decision period 69%»
«Last minute 18%»

Base: all respondents, n=12,000
The Danes visit us most often and they keep coming back

<table>
<thead>
<tr>
<th>Country</th>
<th>Ever visited</th>
<th>Repeat visits</th>
<th>Repeat ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>81%</td>
<td>62%</td>
<td>76%</td>
</tr>
<tr>
<td>Sweden</td>
<td>79%</td>
<td>56%</td>
<td>71%</td>
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<tr>
<td>France</td>
<td>79%</td>
<td>53%</td>
<td>55%</td>
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<tr>
<td>Spain</td>
<td>77%</td>
<td>58%</td>
<td>63%</td>
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<tr>
<td>Italy</td>
<td>72%</td>
<td>48%</td>
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<td>47%</td>
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<td>54%</td>
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<tr>
<td>Netherlands</td>
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<td>28%</td>
<td>64%</td>
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<td>Austria</td>
<td>49%</td>
<td>28%</td>
<td>68%</td>
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<tr>
<td>Switzerland</td>
<td>42%</td>
<td>28%</td>
<td>65%</td>
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<tr>
<td>Denmark</td>
<td>41%</td>
<td>26%</td>
<td>66%</td>
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<td>Sweden</td>
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<td>66%</td>
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<td>Norway</td>
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<td>Scotland</td>
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<td>Canada</td>
<td>24%</td>
<td>11%</td>
<td>57%</td>
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<tr>
<td>Finland</td>
<td>20%</td>
<td>8%</td>
<td>52%</td>
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<td>Iceland</td>
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<td>33%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>10%</td>
<td>3%</td>
<td>33%</td>
</tr>
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</table>

Global | 32% | 18% | 55% |
US     | 25% | 11% | 43% |
UK     | 20% | 6%  | 30% |
Denmark| 81% | 62% | 76% |
Sweden | 79% | 56% | 71% |
China  | 16% | 6%  | 36% |
Spain  | 10% | 3%  | 28% |
Italy  | 17% | 4%  | 25% |
Netherlands | 25% | 9%  | 35% |
France | 15% | 3%  | 19% |
Germany| 26% | 10% | 39% |
**A NOTE ON PLANNING HORIZONS**

China, US and Italy has shorter planning horizon than the rest of the markets

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

<table>
<thead>
<tr>
<th></th>
<th>Global</th>
<th>US</th>
<th>UK</th>
<th>Denmark</th>
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<td>Less than 3 weeks before departure</td>
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<td>Up to 3 months before departure</td>
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</table>

These differences will have impact on when to deploy marketing campaigns in the different markets.
MOTIVATIONAL SEGMENTS

Why
What
Who
9 DISTINCT SEGMENTS

- PLAYFUL LIBERATION
- SOCIAL IMMERSION
- SHARING & CARING
- ESCAPE
- CONTROL
- BROADENING MY CULTURAL HORIZON
- ADVENTURES IN THE WORLD OF NATURAL BEAUTY
- EXTRA VAGANT INDULGENCE
- ENERGY
SEGMENT OVERVIEW AND SIZE

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

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

EXTRAVAGANT INDULGENCE 12%

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

BROADENING MY CULTURAL HORIZON 12%

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

ADVENTURES IN THE WORLD OF NATURAL BEAUTY 15%

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

CONTROL 10%

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

SHAREING & CARING 10%

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

SOCIAL IMMERION 11%

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

HOLIDAYS ABROAD

ESCAPE 12%

ESCAPE IS ABOUT THE EXPERIENCE OF RETREAT, TRANQUILITY AND QUIETNESS.

* Share of overnight stays: The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays.
### SEGMENT SIZE* PER MARKET – LARGE LOCAL DIFFERENCES

<table>
<thead>
<tr>
<th>Country</th>
<th>Playful Liberation</th>
<th>Social Immersion</th>
<th>Sharing &amp; Caring</th>
<th>Escape</th>
<th>Control</th>
<th>Broadening My Cultural Horizon</th>
<th>Experiencing The World Of Natural Beauty</th>
<th>Extravagant Indulgence</th>
<th>Energy</th>
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<td>9%</td>
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</tbody>
</table>

* Share of overnight stays: The segment volume is derived from the number of overnight stays on each occasion. The figures on the slide shows the share of overnight stays on all holidays.
## SEGMENTS SHARE OF OCCASION – GLOBAL
### - ALL DESTINATIONS

<table>
<thead>
<tr>
<th>Total</th>
<th>PLAYFUL</th>
<th>LIBERATION</th>
<th>SOCIAL IMMERSION</th>
<th>SHARING &amp; CARING</th>
<th>ESCAPE</th>
<th>CONTROL</th>
<th>BROADENING MY CULTURAL HORIZON</th>
<th>ADVENTURES IN THE WORLD OF NATURAL BEAUTY</th>
<th>EXTRAVAGANT INDULGENCE</th>
<th>ENERGY</th>
</tr>
</thead>
<tbody>
<tr>
<td># interviews</td>
<td>21928</td>
<td>2217</td>
<td>2202</td>
<td>2265</td>
<td>2574</td>
<td>2471</td>
<td>2828</td>
<td>2528</td>
<td>2780</td>
<td>2063</td>
</tr>
<tr>
<td>Visits to historic sites</td>
<td>57%</td>
<td>57%</td>
<td>61%</td>
<td>42%</td>
<td>47%</td>
<td>56%</td>
<td>72%</td>
<td>66%</td>
<td>58%</td>
<td>53%</td>
</tr>
<tr>
<td>Sun and beach holiday</td>
<td>53%</td>
<td>58%</td>
<td>48%</td>
<td>57%</td>
<td>63%</td>
<td>52%</td>
<td>37%</td>
<td>49%</td>
<td>59%</td>
<td>57%</td>
</tr>
<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td>46%</td>
<td>46%</td>
<td>45%</td>
<td>31%</td>
<td>51%</td>
<td>43%</td>
<td>43%</td>
<td>68%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Sightseeing/round trip</td>
<td>45%</td>
<td>49%</td>
<td>48%</td>
<td>34%</td>
<td>36%</td>
<td>46%</td>
<td>48%</td>
<td>52%</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Cultural experience (focus on art, theatre etc.)</td>
<td>42%</td>
<td>49%</td>
<td>43%</td>
<td>26%</td>
<td>29%</td>
<td>43%</td>
<td>54%</td>
<td>45%</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>City break (focusing on cultural, shopping, Club, restaurant visits etc.)</td>
<td>42%</td>
<td>41%</td>
<td>44%</td>
<td>38%</td>
<td>34%</td>
<td>39%</td>
<td>50%</td>
<td>43%</td>
<td>42%</td>
<td>43%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>31%</td>
<td>28%</td>
<td>37%</td>
<td>42%</td>
<td>26%</td>
<td>31%</td>
<td>27%</td>
<td>33%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Culinary trip</td>
<td>19%</td>
<td>29%</td>
<td>19%</td>
<td>12%</td>
<td>13%</td>
<td>21%</td>
<td>14%</td>
<td>18%</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Party &amp; fun</td>
<td>16%</td>
<td>23%</td>
<td>15%</td>
<td>14%</td>
<td>11%</td>
<td>16%</td>
<td>10%</td>
<td>14%</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Sports/active holiday</td>
<td>15%</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
<td>19%</td>
<td>7%</td>
<td>20%</td>
<td>20%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Travel to cottage/holiday home (hired/own/borrowed cottage/holiday home)</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>18%</td>
<td>20%</td>
<td>15%</td>
<td>8%</td>
<td>13%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Ski holiday</td>
<td>11%</td>
<td>15%</td>
<td>6%</td>
<td>7%</td>
<td>7%</td>
<td>17%</td>
<td>3%</td>
<td>7%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Event holiday (festivals, sports etc.)</td>
<td>10%</td>
<td>14%</td>
<td>9%</td>
<td>6%</td>
<td>5%</td>
<td>13%</td>
<td>5%</td>
<td>9%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Countryside holiday</td>
<td>10%</td>
<td>12%</td>
<td>9%</td>
<td>8%</td>
<td>12%</td>
<td>10%</td>
<td>6%</td>
<td>11%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Health travel</td>
<td>9%</td>
<td>15%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>15%</td>
<td>3%</td>
<td>6%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Other type of winter holiday with snow</td>
<td>7%</td>
<td>10%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>12%</td>
<td>2%</td>
<td>6%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Cruise</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>5%</td>
</tr>
</tbody>
</table>
MAJOR CHANGES IN THE SEGMENTATION VS LAST TIME

NUMBER OF SEGMENTS
This time we have 9 decent sized segments, last there were 8. I.e. we see a more fragmented picture of holiday needs this time.

NEW MEANING OF THE BLUE SEGMENT
In the last segmentation the meaning of the blue segment was more in the direction of a «spa center» experience. This time it’s more about retreating to a quiet place. This could be a quite fisherman’s cottage in Lofoten or a cabin in the mountains.

THE PREVIOUS RED AND GREEN SEGMENTS ARE DIVIDED
In stead of a pure “Exploration” segment and one “Broadening my horizon” segment, we have a red segment (Energy), all about activity and a two green segments (Exploring the world of natural beauty) all about unspoiled nature, and “Broadening my cultural horizon” all about experiencing culture.
Playful Liberation is all about maximizing the pleasure I get out of a holiday and enjoying myself without worrying about the consequences. I go a little crazy, overindulge myself and lose all inhibitions. I am spontaneous, follow my instincts and live for the moment. The purpose of the holiday is abundance and enjoyment. It is impulsive and sometimes excessive or even manic.
The core meaning of going on holiday is to feel completely liberated. Give new energy and allow me to pamper myself.

Of course I need relaxation, but I also need to experience nightlife, visit some amusement park and maybe some spa facilities.

Sometimes I need to let go. Enjoy life to the fullest and feel completely liberated. I need to refill my energy and pamper myself. It’s all about me.

Ipsos Report | August 2017 | Global report

Playful Liberation

Emotional Benefits; What should the holiday give me?

The destination needs to be playful and fresh.

Social Identity; How should it reflect upon me?

The destination should be for people who likes to party. The kind that wants to have as much fun as possible in life. More or less people that like to do things spontaneously, impulsively.

Personality; What should it stand for?

SOME OF THE DATA

- 58% are below 40 years
- 46% of overnight stays
- 54% of people
- 9% of people
- Older than 65 years

- 18-24: 11%
- 25-29: 17%
- 30-39: 30%
- 40-49: 17%
- 50-59: 11%
- 60-65: 5%
- Older than 65 years: 10%
PLAYFUL LIBERATION

TYPICAL HOLIDAY OCCASIONS
Of course you will find the typical sun and beach vacation in this segment, but you will also find ski holidays and culinary trips. Although, most of the time it’s all about party and fun!

HOLIDAY EXPERIENCE
These consumers are spontaneous travellers. They have their favourite spots, but they are driven by the “feel good factor” of what they see in social media or at booking sites. They want to travel to places that are approachable, fresh and playful.

I TRAVEL TO FEEL GOOD
Of course I need relaxation, but I also need to experience nightlife, visit some amusement park and maybe some spa facilities.

SOURCES OF INSPIRATIONS
These consumers don’t spend a lot of time planning where to go. Most of them settle for the trip less than four weeks before they go. They act on what catches their eye in social media or on booking sites. It’s more like “in the spur of the moment”, a typical “last minute booker”. They would rather stay at home than travel without friends, and will often end up going somewhere if their friends tell them.

THE ROLE OF BRANDS
The segment is important for brands/destinations which wish to position themselves as hedonistic and pleasure-seeking (or giving); and for brands which will position themselves in the space of sensuality, sexuality and sensory enjoyment.

Ipsos Marketing
**PLAYFUL LIBERATION - ACTIVE, RELAXED AND FRESH**

**Core motivations**

**Emotional Benefits**
- Makes me feel completely liberated: 172
- Makes me feel full of energy: 147
- Allows me to pamper myself: 140

**Social Identity**
- People who likes to party: 245
- People who want to have as much fun as possible in life: 174
- People that like to do things spontaneously, impulsively: 167

**Personality**
- Playful: 390
- Fresh: 369

**Destination features**
- Has good beaches: 127
- Has good service: 124
- Has good shopping: 121
### SEGMENT PROFILE – PLAYFUL LIBERATION

#### TYPOLOGY

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Significantly over indexed in segment</th>
<th>Significantly under indexed in segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun and beach holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visits to historic sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural experience (focus on art, theatre etc)</td>
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<td></td>
</tr>
<tr>
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<td></td>
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<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td></td>
<td></td>
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<tr>
<td>City break (cultural, shopping, Club, restaurant visits)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culinary trip</td>
<td></td>
<td></td>
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<tr>
<td>Visiting friends and relatives</td>
<td></td>
<td></td>
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<tr>
<td>Party &amp; fun</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sport/active holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ski holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health travel</td>
<td></td>
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</tr>
<tr>
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<td></td>
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<tr>
<td>Travel to cottage/holiday home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Countryside holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other type of winter holiday with snow</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cruise</td>
<td></td>
<td></td>
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</tbody>
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#### DURATION

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<th>Duration</th>
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<td>3 to 4 days</td>
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<td>5 to 6 days</td>
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<td>7 to 8 days</td>
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<tr>
<td>9 to 14 days</td>
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</tr>
<tr>
<td>15 or more days</td>
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#### TIME OF YEAR

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<tr>
<td>Jan</td>
<td>7%</td>
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<tr>
<td>Feb</td>
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<td>7%</td>
</tr>
<tr>
<td>Mar</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Apr</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>May</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Jun</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Jul</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Aug</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Sep</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Oct</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Nov</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Dec</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### TRANSPORT AND ACCOMODATION

#### TRANSPORT TO DESTINATION

<table>
<thead>
<tr>
<th>Transport</th>
<th>Significantly over indexed in segment</th>
<th>Significantly under indexed in segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Car</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Car w/ caravan</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Scheduled plane</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Charter plane</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Motorbike</td>
<td>1%</td>
<td></td>
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</tbody>
</table>

#### TRANSPORT ON DESTINATION

<table>
<thead>
<tr>
<th>Transport</th>
<th>Significantly over indexed in segment</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Plane</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Car</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Bus</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Own car</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>No transportation</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Car w/ caravan</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Bicycle</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Camper van</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Motorbike</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

#### ACCOMODATION

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Significantly over indexed in segment</th>
<th>Significantly under indexed in segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (medium standard)</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Hotel (high standard)</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Hotel (budget)</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Rented cabin / holiday home / flat</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Guest house / Bed &amp; Breakfast</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Stayed with friends / acquaintances</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>In a private person’s home through Airbnb or other</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Borrowed cabin / holiday home / flat</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Stayed with family</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Owned cabin / holiday home / flat</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Tent</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Caravan / camper van</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Camping cabin</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

#### ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Significantly over indexed in segment</th>
<th>Significantly under indexed in segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxation</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Taste local food and drink</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Observe beauty of nature</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Visit cities</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Visit historical buildings/sites</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Visit restaurants</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Discover local culture and lifestyle</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Attend sightseeing tours</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Sunbathing and swimming</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Visit parks and gardens</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Discover local history and legends</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Visit museums</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Experience local architecture</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Visit the countryside</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Experience city nightlife</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights)</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Hiking (less than two hours)</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Experience national festivals and traditional celebrations</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Experience mountains, the wilderness or the wildlife</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Get pampered</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Visit spa resorts</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Visit amusement parks</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Visit art exhibitions</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Attend concerts/festivals</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Hiking (more than two hours)</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Do winter activities (Alpine skiing/snowboarding, cross-country skiing, etc)</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Fresh or salt water fishing</td>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>
**SEGMENT PROFILE - PLAYFUL LIBERATION**

**PLANNING**

**DECISION MADE**
- Less than one week before departure: 8%
- 1-3 weeks before departure: 17%
- Up to 1 month before departure: 22%
- Up to 2 months before departure: 18%
- Up to 3 months before departure: 15%
- Up to 4-6 months before departure: 11%
- Up to 6-12 months before departure: 5%
- More than one year before departure: 1%

**TRAVEL COMPANIONS**

**WHO DID YOU TRAVEL WITH**
- Spouse/partner: 67%
- Friends: 25%
- Children 7-14 years: 17%
- Other family/relatives: 15%
- Children 0-6 years: 12%
- Children 15 years and above: 8%
- Alone: 6%
- Other people: 3%

**INFLUENCERS**

- Spouse/Partner: 55%
- Friends/acquaintances/colleagues: 26%
- Parents/other relatives: 13%
- Nobody except myself: 12%
- Children 7-14 years: 11%
- Children 0-6 years: 7%
- Children 15 years and older: 6%
- Other: 2%

**INFORMATION SOURCES**
- Internet in general: 69%
- Homepages for the destination: 28%
- Homepages for hotels/other accommodations: 27%
- Homepages for attractions and sights: 23%
- Advice from friends/family: 19%
- Booking sites such as Expedia and Lastminute: 19%
- Guidebooks: 18%
- Travel apps/portals like Tripadvisor etc: 17%
- Social media such as Facebook or blogs: 17%
- Homepages of carriers, including airlines etc: 17%
- Reviews from other travelers online: 16%
- Travel agent in homeland: 15%
- Catalogs or brochures: 12%
- Newspapers or magazines: 8%
- TV or radio: 5%
- Travel fairs: 4%
- Other: 3%

**NUMBER OF TRAVEL COMPANIONS**

- 0: 1%
- 1: 8%
- 2: 35%
- 3: 17%
- 4: 15%
- 5 or more: 23%

**HOW DID YOU TRAVEL**

- I/we travelled in a group with an organized tour: 31%
- I/we had the trip organized by others and travelled independently: 14%
- I/we organized the trip myself/ourselves and travelled independently: 54%
- Don't know: 2%

**TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)**

- 1 time: 9%
- 2 to 3 times: 43%
- 4 to 5 times: 21%
- 6 times or more: 27%
Social immersion is all about wanting to be harmoniously connected with other people. For me, meeting people is a joy. I love having good times with good friends and opening up and meeting new people.
SOCIAL IMMERSION

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to meet new people. I want to go to a place where I can immerse myself in the local life and broaden my horizon. A place that enriches my view on the world. I want to discover new and interesting places.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?
I want to destinations that has good opportunities to meet local people. It needs to be known for its friendly people. I want good local cuisine and interesting sights, interesting culture & art and a rich cultural heritage.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be sociable, outgoing, open-minded, friendly and authentic.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people who are always looking to connect with others. People who enjoy an active and busy social life. People who enjoy spending time with friends. People who are interested to learn more. People who like to explore and have new experiences.

Sometimes I need to immerse myself into local life, meet new people and eat local cuisine.

40% are above 60 years

SHARE OF OVERNIGHT STAYS

11%
SOCIAL IMMERSION

TYPICAL HOLIDAY OCCASIONS
In this segment you will find trips to visit historical sites and at lot of sightseeing/round trips. There are of course some sun & beach holidays here but moreover you will find holidays to experience scenery and wildlife as well as city breaks.

HOLIDAY EXPERIENCE
These consumers are that organize their trip themselves and travels independently. They often travel with friends and seek a social experience in a new to them culture. They want to immerse themselves in local life and culture, connect with others and spend time with friends.

I TRAVEL TO MEET THE LOCALS
These consumers want to taste local food and drink. They want to visit cities and discover local culture and lifestyle. Local history and legends are also of interest. They want to experience local architecture and see visit historical buildings and sites. Museums is also on the list. The experience of national festivals and traditional celebrations are most appreciated.

SOURCES OF INSPIRATIONS
Most of these consumers make their decision less than 4 months before their departure (63%). They act on what catches their eye in social media or on booking sites. Their spouse/partner heavily influences their choice.

THE ROLE OF BRANDS
The segment is important for brands which try to position themselves as enhancers of friendships, as social brands which help bring people together, and brands which are open, inclusive, and seeking to reflect shared pleasures. It is important for brands which seek to support collaboration with their customers.

I TRAVEL TO MEET THE LOCALS

SOURCES OF INSPIRATIONS

THE ROLE OF BRANDS

HOLIDAY EXPERIENCE
SOCIAL IMMERSION - ACTIVE, RELAXED AND FRESH

Core motivations

**Emotional Benefits**
- Helps me to meet new people: 241
- Allows me to immerse myself in the local life: 236
- Allows me to broaden my knowledge: 139
- Enriches my view on the world: 131
- Allows me to broaden my horizon: 130
- Allows me to discover new and interesting places: 130

**Social Identity**
- People who are always looking to connect with others: 251
- People who have an active and busy social life: 161
- People who enjoy spending time with friends: 159
- People who are interested to learn more: 135
- People who like to explore and have new experiences: 124

**Personality**
- Sociable: 199
- Outgoing: 184
- Open-minded: 170
- Friendly: 168
- Authentic: 126

**Functional Characteristics**
- Has good opportunities to meet local people: 261
- Has friendly people: 188
- Has good local cuisine: 175
- Has interesting sights: 128
- Has interesting culture & art: 125
- Has rich cultural heritage: 124
**SEGMENT PROFILE – SOCIAL IMMERSION**

**TYPOLOGY**

- **TYPE OF HOLIDAY**
  - Visits to historic sites: 61%
  - Sightseeing/round trip: 48%
  - Sun and beach holiday: 48%
  - Holiday to experience nature, scenery and wildlife: 45%
  - City break (cultural, shopping, Club, restaurant visits...): 44%
  - Cultural experience (focus on art, theatre etc): 43%
  - Visiting friends and relatives: 37%
  - Culinary trip: 19%
  - Party & fun: 15%
  - Travel to cottage/holiday home: 12%
  - Sports/active holiday: 10%
  - Countryside holiday: 9%
  - Event holiday (festivals, sports etc): 7%
  - Cruise: 6%
  - Ski holiday: 6%
  - Health travel: 6%
  - Other type of winterholiday with snow: 4%

**DURATION**

- 3 to 4 days: 17%
- 5 to 6 days: 19%
- 7 to 8 days: 20%
- 9 to 14 days: 25%
- 15 or more days: 19%

**TIME OF YEAR**

- Jan: 4%
- Feb: 6%
- Mar: 8%
- Apr: 10%
- May: 11%
- Jun: 10%
- Jul: 10%
- Aug: 12%
- Sep: 13%
- Oct: 7%
- Nov: 4%
- Dec: 5%

**TRANSPORT AND ACOMMODATION**

**TRANSPORT TO DESTINATION**

- Plane: 65%
- Car: 30%
- Bus: 12%
- Train: 6%
- Ferry / boat / cruise: 6%
- Scheduled plane: 3%
- Charter plane: 2%
- Camper van: 2%
- Car w/ caravan: 1%
- Motorbike: 1%
- Bus: 34%
- Rent a car: 23%
- Own car: 20%
- Plane: 14%
- Other: 10%
- No transportation: 8%
- Ferry / boat / cruise: 7%
- Bicycle: 7%
- Camper van: 2%
- Car w/ caravan: 2%
- Motorbike: 1%

**ACCOMMODATION**

- Hotel (medium standard): 44%
- Hotel (high standard): 16%
- Hotel (budget): 13%
- Stayed with friends / acquaintances: 10%
- Guest house / Bed & Breakfast: 9%
- Stayed at family: 5%
- In a private person's home through Airbnb or other...: 5%
- Caravan / camper van: 2%
- Owned cabin / holiday home / flat: 2%
- Borrowed cabin / holiday home / flat: 2%
- Tent: 1%
- Camping cabin: 1%

**ACTIVITIES**

- Taste local food and drink: 64%
- Visit cities: 57%
- Discover local culture and lifestyle: 56%
- Visit historical buildings/sites: 55%
- Relaxation: 52%
- Observe beauty of nature: 48%
- Visit restaurants: 42%
- Discover local history and legends: 33%
- Visit museums: 32%
- Shopping: 31%
- Experience local architecture: 29%
- Attend sightseeing tours: 28%
- Visit the countryside: 27%
- Visit parks and gardens: 25%
- Experience national festivals and traditional celebrations: 23%
- Sunbathing and swimming: 23%
- Hiking (less than two hours): 19%
- Experience city nightlife: 18%
- Observe natural phenomenon (i.e. volcanoes, northern...) 16%
- Experience mountains, the wilderness or the wildlife: 16%
- Visit art exhibitions: 14%
- Attend concerts/festivals: 13%
- Get pampered: 12%
- Hiking (more than two hours): 8%
- Visit spa resorts: 7%
- Visit amusement parks: 6%
- Fresh or salt water fishing: 3%
- Do winter activities (Alpine skiing/snowboarding, cross...: 3%
### SEGMENT PROFILE - SOCIAL IMMERSION

#### PLANNING

**DECISION MADE**

<table>
<thead>
<tr>
<th>Time Before Departure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one week</td>
<td>5%</td>
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<tr>
<td>1-3 weeks</td>
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<tr>
<td>Up to 1 month</td>
<td>14%</td>
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<td>Up to 2 months</td>
<td>17%</td>
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<tr>
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<td>16%</td>
</tr>
<tr>
<td>Up to 4-6 months</td>
<td>23%</td>
</tr>
<tr>
<td>Up to 6-12 months</td>
<td>11%</td>
</tr>
<tr>
<td>More than one year</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### INFLUENCERS

**Spouse/Partner**

- 53%

**Friends/acquaintances/colleagues**

- 25%

**Nobody except myself**

- 17%

**Parents/other relatives**

- 12%

**Children 15 years and older**

- 6%

**Children 7-14 years**

- 3%

**Children 0-6 years**

- 3%

**Other**

- 2%

#### INFORMATION SOURCES

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Travel fairs</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

#### TRAVEL COMPANION

**WHO DID YOU TRAVEL WITH**

- Spouse/partner: 64%
- Friends: 25%
- Other family/relatives: 14%
- Children 15 years and above: 9%
- Children 7-14 year: 9%
- Alone: 8%
- Children 0-6 years: 5%
- Other people: 5%

#### NUMBER OF TRAVEL COMPANIONS

<table>
<thead>
<tr>
<th>Number of Companions</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2%</td>
</tr>
<tr>
<td>1</td>
<td>13%</td>
</tr>
<tr>
<td>2</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>13%</td>
</tr>
<tr>
<td>4</td>
<td>14%</td>
</tr>
<tr>
<td>5 or more</td>
<td>22%</td>
</tr>
</tbody>
</table>

#### HOW DID YOU TRAVEL

- I/we travelled in a group with an organized tour: 25%
- I/we had the trip organized by others and travelled independently: 11%
- I/we organized the trip myself/ourselves and travelled independently: 60%
- Don't know: 4%

#### TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

- 1 time: 10%
- 2 to 3 times: 45%
- 4 to 5 times: 19%
- 6 times or more: 26%
Sharing and caring is all about being surrounded by people who accept me as I am, as an equal and who make me feel welcome. Sharing and caring is about the need to be part of society or a group we really feel part of. Part of this is linked to following norms and traditions just because we are part of that culture or group. It is about togetherness, brotherhood, camaraderie, taking care of others, being taken care of by others, and doing and feeling good.
SHARING AND CARING

SOMETIMES I NEED TO SPOIL MY LOVED ONES AND CREATE PRECIOUS MOMENTS OF TOGETHERNESS. MY FAMILY COMES FIRST ABOVE ALL.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to spoil my loved ones. I want to intensify the relationship with my loved one(s) and create precious moments of togetherness. We want to share good times and escape from my hectic daily life.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?
It has to be a destination that is easy to travel to. I want few language barriers and good value for money. My family needs guaranteed sunshine. It should have friendly people, good beaches, and a variety of different restaurant offers. We like to enjoy good local cuisine. We also like to travel around so it has to be easy to travel around.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be sociable, friendly, relaxed, cozy, harmonious and peaceful.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people for whom family comes first above all. This is people who have strong family values. People who enjoy spending time with and enjoy taking care of others. People who want to escape from the demands of life and relax and unwind.

74% ARE ABOVE 40 YEARS

50%

50%

SHARE OF OVERNIGHT STAYS 10%
TYPICAL HOLIDAY OCCASIONS
You will find the typical sun and beach vacation in this segment also, but you will find more holidays to visit friends and family and travels to cottage/holiday homes here than in other segments. For these consumers it's all about family.

HOLIDAY EXPERIENCE
Relaxation is on top of the list. Activities like sunbathing and swimming, and getting pampered is also appreciated by this segment. They like to taste local food and drinks and observe the beauty of nature as long as the activities are slow, warm and friendly. No pushing boundaries please!

I TRAVEL TO FEEL INCLUDED
These consumers choose destinations that enables them to spend time with their loved ones. They want to travel to places that are sociable, friendly and relaxed. They want to create those precious moments of togetherness.

SOURCES OF INSPIRATIONS
Of course they use the internet, but more than in other segments they act on advice from friends/family. Parents and other relatives heavily influences their choice. They travel with children and the oldest children are a part of the decision process.

THE ROLE OF BRANDS
Brands that want to tap into the needs in this segment should focus on support, empathy, care giving and true, deep friendships. They should position themselves as familiar and appealing to a broader audience and tap into those feelings that people get when they feel warm, included and accepted by the people or tribe they are with.
Core motivations

**SHARING AND CARING**

### Emotional Benefits

- Allows me to spoil my loved ones: 206
- Allows me to intensify the relationship with my loved one(s): 200
- Creates precious moments of togetherness: 193
- Allows me to share good times with others: 177
- Helps me to escape from my hectic daily life: 126
- Allows me to pamper myself: 122

### Social Identity

- People for whom family comes first above all: 267
- People who have strong family values: 253
- People who enjoy spending time with friends: 201
- People who enjoy taking care of others: 187
- People who want to escape from the demands of life and relax and unwind: 122

### Personality

- Sociable: 218
- Friendly: 178
- Relaxed: 160
- Cozy: 151
- Harmonious: 140
- Peaceful: 139

### Functional Characteristics

- Is easy to travel to: 190
- Has few language barriers: 156
- Good value for money: 145
- Has guaranteed sunshine: 141
- Has friendly people: 141
- Has good beaches: 133
- Has good local cuisine: 129
- Has a variety of different restaurant offers: 129
- Is easy to travel around: 127
SEGMENT PROFILE - SHARING AND CARING

PLANNING

DECISION MADE

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one week before departure</td>
<td>5%</td>
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<tr>
<td>1-3 weeks before departure</td>
<td>12%</td>
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<td>Up to 1 month before departure</td>
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<td>18%</td>
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<td>Up to 3 months before departure</td>
<td>15%</td>
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<tr>
<td>Up to 4-6 months before departure</td>
<td>21%</td>
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<tr>
<td>Up to 6-12 months before departure</td>
<td>11%</td>
</tr>
<tr>
<td>More than one year before departure</td>
<td>1%</td>
</tr>
</tbody>
</table>

TRAVEL COMPANIONS

WHO DID YOU TRAVEL WITH

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/partner</td>
<td>71%</td>
</tr>
<tr>
<td>Other family/relatives</td>
<td>23%</td>
</tr>
<tr>
<td>Children 7-14 year</td>
<td>17%</td>
</tr>
<tr>
<td>Friends</td>
<td>17%</td>
</tr>
<tr>
<td>Children 15 years and above</td>
<td>15%</td>
</tr>
<tr>
<td>Children 0-6 years</td>
<td>13%</td>
</tr>
<tr>
<td>Alone</td>
<td>6%</td>
</tr>
<tr>
<td>Other people</td>
<td>2%</td>
</tr>
</tbody>
</table>

INFLUENCERS

<table>
<thead>
<tr>
<th>Influencer Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>19%</td>
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<tr>
<td>Friends/acquaintances/colleagues</td>
<td>19%</td>
</tr>
<tr>
<td>Parents/other relatives</td>
<td>12%</td>
</tr>
<tr>
<td>Nobody except myself</td>
<td>11%</td>
</tr>
<tr>
<td>Children 15 years and older</td>
<td>8%</td>
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<tr>
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<td>4%</td>
</tr>
<tr>
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<td>1%</td>
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</tbody>
</table>

INFORMATION SOURCES

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<td>10%</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>9%</td>
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<tr>
<td>Catalogs or brochures</td>
<td>8%</td>
</tr>
<tr>
<td>Social media such as Facebook or blogs</td>
<td>3%</td>
</tr>
<tr>
<td>Newspapers or magazines</td>
<td>2%</td>
</tr>
<tr>
<td>TV or radio</td>
<td>1%</td>
</tr>
<tr>
<td>Travel fairs</td>
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NUMBER OF TRAVEL COMPANIONS

<table>
<thead>
<tr>
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<th>Percentage</th>
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<tbody>
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<td>0</td>
<td>2%</td>
</tr>
<tr>
<td>1</td>
<td>11%</td>
</tr>
<tr>
<td>2</td>
<td>34%</td>
</tr>
<tr>
<td>3</td>
<td>13%</td>
</tr>
<tr>
<td>4</td>
<td>17%</td>
</tr>
<tr>
<td>5 or more</td>
<td>24%</td>
</tr>
</tbody>
</table>

HOW DID YOU TRAVEL

<table>
<thead>
<tr>
<th>Travel Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I/we travelled in a group with an organized tour</td>
<td>16%</td>
</tr>
<tr>
<td>I/we had the trip organized by others and travelled independently</td>
<td>12%</td>
</tr>
<tr>
<td>I/we organized the trip myself/ourselves and travelled independently</td>
<td>62%</td>
</tr>
<tr>
<td>Don't know</td>
<td>10%</td>
</tr>
</tbody>
</table>

TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 time</td>
<td>10%</td>
</tr>
<tr>
<td>2 to 3 times</td>
<td>43%</td>
</tr>
<tr>
<td>4 to 5 times</td>
<td>21%</td>
</tr>
<tr>
<td>6 times or more</td>
<td>26%</td>
</tr>
</tbody>
</table>
Escape is about the experience of retreat, tranquility and quietness. These are the holidays one feels the need to **retreat** and **recharge**. One is looking for an experience that soothes, comforts and **takes away the stresses and strains of hectic daily life**. These are the holidays one withdraws to a physical or mental space that is **worry free** - an almost childlike state of feeling safe and cared for.
**ESCAPE**

**EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?**
The core meaning of going on holiday is to *restore my sense of harmony* and balance. I need to escape from my hectic daily life, and *pamper myself*. I want to feel completely liberated, enjoy life to the fullest and recharge.

**DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?**
I want to go to a place that has *quiet environments*, and allows me to live *close to nature*. It should not be ruined by tourism. I need good beaches and guaranteed sunshine. I would also like beautiful *unspoiled nature*.

**PERSONALITY; WHAT SHOULD IT STAND FOR?**
The destination needs to be *peaceful, harmonious, relaxed* and cozy.

**SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?**
The destination should be for people who needs time for themselves. People who want to *revitalize* themselves, and *escape* from the demands of life and *relax* and unwind.

---

**SHARE OF OVERNIGHT STAYS**

- 18-24: 7%
- 25-29: 8%
- 30-39: 18%
- 40-49: 21%
- 50-59: 19%
- 60-65: 10%
- Older than 65 years: 16%

---

**40% ARE BETWEEN 40-59 YEARS**

**53%**

**47%**
ESCAPE

TYPICAL HOLIDAY OCCASIONS
Of course you will find the typical sun and beach vacation in this segment, but you will find more travels to cottage/holiday home and countryside holidays than in other segments.

HOLIDAY EXPERIENCE
Relaxation is on top of the list more than in other segments. The same goes for observing the beauty of nature. Activities like sunbathing and swimming, and getting pampered is also appreciated by this segment. They like to taste visit the countryside and do hiking. As long as the activities are in quiet environments close to nature we are in line with segment needs.

I TRAVEL TO A QUIET PLACE
These consumers choose destinations that makes them restore their sense of harmony. They travel by car to a greater extent than other segments and they are also more prune to stay at a cabin, holiday home or flat than in other segments. They normally stay for 7-14 days.

SOURCES OF INSPIRATIONS
Many of these consumers decide on the trip well ahead of departure. 34% of them settle for the trip four months or more before they go. They are not over indexing on any information source, and the internet in general is the largest point of inspiration.

THE ROLE OF BRANDS
This segment is important when brands want to profile themselves as supporting people in relieving stress and tension. These are the brands and companies that focus on protection and prevention against danger and harm in everyday life. These brands function as a safety net around us, our families and loved ones.
**ESCAPE**

Core motivations

### Emotional Benefits

- Restores my sense of harmony and balance: 234
- Helps me to escape from my hectic daily life: 208
- Allows me to pamper myself: 147
- Makes me feel completely liberated: 143
- Helps me to enjoy life to the fullest: 129
- Makes me feel full of energy: 125

### Social Identity

- People who need time for themselves: 241
- People who want to revitalize themselves: 218
- People who want to escape from the demands of life and relax and unwind: 216

### Personality

- Peaceful: 221
- Harmonious: 204
- Relaxed: 183
- Cozy: 165

### Functional Characteristics

- Has quiet environments: 232
- Allows me to live close to nature: 184
- Is not ruined by tourism: 172
- Has good beaches: 167
- Has guaranteed sunshine: 163
- Has unspoiled nature: 157
- Has beautiful nature: 154
- Good value for money: 126

_Ipsos Report | August 2017 | Global report_
SEGMENT PROFILE – ESCAPE

TYPOLOGY

TYPE OF HOLIDAY
- Sun and beach holiday
- Holiday to experience nature, scenery and wildlife
- Visits to historic sites
- Sightseeing/round trip
- City break (cultural, shopping, Club, restaurant visits)
- Cultural experience (focus on art, theatre etc)
- Visiting friends and relatives
- Travel to cottage/holiday home
- Culinary trip
- Countryside holiday
- Party & fun
- Sports/active holiday
- Health travel
- Ski holiday
- Cruise
- Event holiday (festivals, sports etc)
- Other type of winter holiday with snow

DURATION
- 3 to 4 days
- 5 to 6 days
- 7 to 8 days
- 9 to 14 days
- 15 or more days

TIME OF YEAR
- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

TRANSPORT AND ACOMMODATION

TRANSPORT TO DESTINATION
- Plane
- Car
- Bus
- Ferry / boat / cruise
- Train
- Scheduled plane
- Camper van
- Charter plane
- Car w/ caravan

TRANSPORT ON DESTINATION
- Own car
- Rented car
- Bus
- Plane
- Ferry / boat / cruise
- Train
- Bicycle
- Camper van
- Car w/ caravan
- Motorbike
- No transportation
- Other

ACCOMMODATION
- Hotel (medium standard)
- Rented cabin / holiday home / flat
- Hotel (high standard)
- Hotel (budget)
- Guest house / Bed & Breakfast
- Stayed with family
- Stayed with friends / acquaintances
- Caravan / camper van
- In a private person’s home through Airbnb or other...
- Owned cabin / holiday home / flat
- Tent
- Borrowed cabin / holiday home / flat
- Camping cabin

ACTIVITIES

ACTIVITIES
- Relaxation
- Observe beauty of nature
- Taste local food and drink
- Sunbathing and swimming
- Discover local culture and lifestyle
- Visit cities
- Visit historical buildings/sites
- Visit restaurants
- Hiking (less than two hours)
- Shopping
- Visit the countryside
- Experience mountains, the wilderness or the wildlife
- Discover local history and legends
- Visit parks and gardens
- Observe natural phenomenon (i.e. volcanoes, northern...
- Attend sightseeing tours
- Experience local architecture
- Get pampered
- Visit museums
- Hiking (more than two hours)
- Experience national festivals and traditional celebrations
- Experience city nightlife
- Visit spa resorts
- Visit art exhibitions
- Attend concerts/festivals
- Fresh or salt water fishing
- Visit amusement parks
- Do winter activities (Alpine skiing/snowboarding, cross...

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SEGMENT PROFILE - ESCAPE

DECISION MADE

- Less than one week before departure: 5%
- 1-3 weeks before departure: 11%
- Up to 1 month before departure: 15%
- Up to 2 months before departure: 17%
- Up to 3 months before departure: 16%
- Up to 4-6 months before departure: 21%
- Up to 6-12 months before departure: 11%
- More than one year before departure: 2%

INFLUENCERS

- Spouse/Partner: 60%
- Nobody except myself: 16%
- Friends/acquaintances/colleagues: 14%
- Parents/other relatives: 14%
- Children 15 years and older: 6%
- Children 7-14 years: 6%
- Children 0-6 years: 3%
- Other: 1%

INFORMATION SOURCES

- Internet in general: 68%
- Homepages for the destination: 31%
- Homepages for hotels/other accommodations: 26%
- Advice from friends/family: 20%
- Homepages for attractions and sights: 17%
- Guidebooks: 16%
- Booking sites such as Expedia and Lastminute: 16%
- Travel apps/portals like Tripadvisor etc: 15%
- Reviews from other travelers online: 15%
- Travel agent in homeland: 14%
- Homepages of carriers, including airlines etc: 12%
- Catalogs or brochures: 12%
- Social media such as Facebook or blogs: 5%
- Newspapers or magazines: 4%
- TV or radio: 2%
- Travel fairs: 1%
- Other: 7%

TRAVEL COMPANIONS

WHO DID YOU TRAVEL WITH

- Spouse/partner: 71%
- Other family/relatives: 16%
- Friends: 14%
- Children 7-14 years: 13%
- Children 15 years and above: 10%
- Children 0-6 years: 8%
- Alone: 7%
- Other people: 2%

NUMBER OF TRAVEL COMPANIONS

- 0: 3%
- 1: 15%
- 2: 39%
- 3: 13%
- 4: 13%
- 5 or more: 17%

HOW DID YOU TRAVEL

- I/we travelled in a group with an organized tour: 19%
- I/we had the trip organized by others and travelled independently: 11%
- I/we organized the trip myself/courtselves and travelled independently: 65%
- Don’t know: 5%

TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

- 1 time: 10%
- 2 to 3 times: 47%
- 4 to 5 times: 21%
- 6 times or more: 22%
Control is about avoiding surprises and seek the familiar instead of the unknown. There are holidays when I like to be completely in control, to keep things in order, keeping it practical and predictable feels quite comfortable and safe. This gives me a sense of stability and structure.
CONTROL

I LIKE TO KEEP EVERYTHING UNDER CONTROL AND AVOID SURPRISES. I HAS TO BE WELL ORGANIZED, PRACTICAL AND PREDICTABLE.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to keep everything under control. I want to avoid too much surprises. I want a holiday that gives me a safe feeling.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?
I want to go to a place that is well organized and not too warm. Good service is important to me. It has to be easy to travel to.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be practical, predictable and structured.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people who make rational choices. People who prefer the familiar over the unknown. Basically people who avoid risk.

41% ARE BETWEEN 30-49 YEARS

39%

61%

SHARE OF OVERNIGHT STAYS 10%
CONTROL

Typical Holiday Occasions
Although the typical sun and beach vacation and visits to historic sites dominates in this segment, you will also find ski holidays and sports/active holidays to a greater extent than in other segments. The same goes for health travel, event holiday and other type of winter holiday with snow. This is mainly driven by the Danish and the Swedish market.

Holiday Experience
Relaxation is on top of the list. This segment is under indexing on many activities, so a less active segment. They would like to visit cities and have restaurant meals.

I Travel to Avoid Surprises
These consumers choose destinations that is well organized. They want to travel to places that are practical, predictable and structured. They want to have a informal, fun and relaxed holiday at the same time. I want to avoid too much surprises!

Sources of Inspirations
These consumers travel with children so they are highly influenced by b their spouse and their children. Many travel in a group with an organized tour (32%). They do not use that many information sources because the go to a place they know.

The Role of Brands
Control plays an important role for brands if they are aimed at structuring people’s lives or when the focus is on risk management, simplifying life, avoiding surprises. Brands that want to position themselves on Control should offer rational arguments and focus on functionality, maturity, health, purity, hygiene, and less in impulsiveness and fun.
**CONTROL**

Core motivations

### Emotional Benefits
- Allows me to keep everything under control: 325
- Helps me avoid too much surprises: 297
- Gives me a safe feeling: 228

### Social Identity
- People who make rational choices: 307
- People who prefer the familiar over the unknown: 288
- People who avoid risk: 278

### Personality
- Practical: 340
- Predictable: 338
- Structured: 317

### Functional Characteristics
- Is well organized: 143
- Is not too warm: 140
- Has good service: 131
- Is easy to travel to: 120
### Segment Profile – Control

#### Typology

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits to historic sites</td>
<td>56%</td>
</tr>
<tr>
<td>Sun and beach holiday</td>
<td>52%</td>
</tr>
<tr>
<td>Sightseeing/round trip</td>
<td>46%</td>
</tr>
<tr>
<td>Cultural experience (focus on art, theatre etc)</td>
<td>43%</td>
</tr>
<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td>43%</td>
</tr>
<tr>
<td>City break (cultural, shopping, Club, restaurant visits)</td>
<td>39%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>31%</td>
</tr>
<tr>
<td>Culinary trip</td>
<td>21%</td>
</tr>
<tr>
<td>Sports/active holiday</td>
<td>19%</td>
</tr>
<tr>
<td>Ski holiday</td>
<td>17%</td>
</tr>
<tr>
<td>Party &amp; fun</td>
<td>16%</td>
</tr>
<tr>
<td>Travel to cottage/holiday home</td>
<td>15%</td>
</tr>
<tr>
<td>Health travel</td>
<td>15%</td>
</tr>
<tr>
<td>Event holiday (festivals, sports etc)</td>
<td>13%</td>
</tr>
<tr>
<td>Other type of winterholiday with snow</td>
<td>12%</td>
</tr>
<tr>
<td>Countryside holiday</td>
<td>10%</td>
</tr>
<tr>
<td>Cruise</td>
<td>7%</td>
</tr>
</tbody>
</table>

#### Duration

<table>
<thead>
<tr>
<th>Duration</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 to 4 days</td>
<td>24%</td>
</tr>
<tr>
<td>5 to 6 days</td>
<td>22%</td>
</tr>
<tr>
<td>7 to 8 days</td>
<td>22%</td>
</tr>
<tr>
<td>9 to 14 days</td>
<td>19%</td>
</tr>
<tr>
<td>15 or more days</td>
<td>13%</td>
</tr>
</tbody>
</table>

#### Time of Year

<table>
<thead>
<tr>
<th>Month</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>6%</td>
</tr>
<tr>
<td>Feb</td>
<td>8%</td>
</tr>
<tr>
<td>Mar</td>
<td>8%</td>
</tr>
<tr>
<td>Apr</td>
<td>9%</td>
</tr>
<tr>
<td>May</td>
<td>10%</td>
</tr>
<tr>
<td>Jun</td>
<td>8%</td>
</tr>
<tr>
<td>Jul</td>
<td>12%</td>
</tr>
<tr>
<td>Aug</td>
<td>12%</td>
</tr>
<tr>
<td>Sep</td>
<td>9%</td>
</tr>
<tr>
<td>Oct</td>
<td>7%</td>
</tr>
<tr>
<td>Nov</td>
<td>5%</td>
</tr>
<tr>
<td>Dec</td>
<td>6%</td>
</tr>
</tbody>
</table>

#### Transport and Accommodation

### Transport to Destination

<table>
<thead>
<tr>
<th>Mode</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane</td>
<td>61%</td>
</tr>
<tr>
<td>Car</td>
<td>34%</td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>12%</td>
</tr>
<tr>
<td>Train</td>
<td>8%</td>
</tr>
<tr>
<td>Camper van</td>
<td>6%</td>
</tr>
<tr>
<td>Car w/ caravan</td>
<td>6%</td>
</tr>
<tr>
<td>Scheduled plane</td>
<td>5%</td>
</tr>
<tr>
<td>Charter plane</td>
<td>4%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Transport on Destination

<table>
<thead>
<tr>
<th>Mode</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>26%</td>
</tr>
<tr>
<td>Rented car</td>
<td>25%</td>
</tr>
<tr>
<td>Bus</td>
<td>21%</td>
</tr>
<tr>
<td>Plane</td>
<td>11%</td>
</tr>
<tr>
<td>Train</td>
<td>7%</td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>6%</td>
</tr>
<tr>
<td>No transportation</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
<tr>
<td>Car w/ caravan</td>
<td>4%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>4%</td>
</tr>
<tr>
<td>Camper van</td>
<td>2%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Accommodation

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (medium standard)</td>
<td>39%</td>
</tr>
<tr>
<td>Hotel (high standard)</td>
<td>22%</td>
</tr>
<tr>
<td>Hotel (budget)</td>
<td>16%</td>
</tr>
<tr>
<td>Rented cabin / holiday home / flat</td>
<td>14%</td>
</tr>
<tr>
<td>Guest house / Bed &amp; Breakfast</td>
<td>10%</td>
</tr>
<tr>
<td>Borrowed cabin / holiday home / flat</td>
<td>6%</td>
</tr>
<tr>
<td>Owned cabin / holiday home / flat</td>
<td>5%</td>
</tr>
<tr>
<td>Stayed with friends / acquaintances</td>
<td>5%</td>
</tr>
<tr>
<td>Stayed with family</td>
<td>4%</td>
</tr>
<tr>
<td>In a private person's home through Airbnb or other…</td>
<td>3%</td>
</tr>
<tr>
<td>Camping cabin</td>
<td>3%</td>
</tr>
<tr>
<td>Caravan / camper van</td>
<td>3%</td>
</tr>
<tr>
<td>Tent</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxation</td>
<td>50%</td>
</tr>
<tr>
<td>Visit cities</td>
<td>43%</td>
</tr>
<tr>
<td>Taste local food and drink</td>
<td>37%</td>
</tr>
<tr>
<td>Observe beauty of nature</td>
<td>35%</td>
</tr>
<tr>
<td>Visit historical buildings/sites</td>
<td>33%</td>
</tr>
<tr>
<td>Visit restaurants</td>
<td>30%</td>
</tr>
<tr>
<td>Discover local culture and lifestyle</td>
<td>26%</td>
</tr>
<tr>
<td>Shopping</td>
<td>24%</td>
</tr>
<tr>
<td>Attend sightseeing tours</td>
<td>21%</td>
</tr>
<tr>
<td>Discover local history and legends</td>
<td>18%</td>
</tr>
<tr>
<td>Visit parks and gardens</td>
<td>18%</td>
</tr>
<tr>
<td>Visit museums</td>
<td>17%</td>
</tr>
<tr>
<td>Experience local architecture</td>
<td>16%</td>
</tr>
<tr>
<td>Visit the countryside</td>
<td>16%</td>
</tr>
<tr>
<td>Sunbathing and swimming</td>
<td>14%</td>
</tr>
<tr>
<td>Hiking (less than two hours)</td>
<td>14%</td>
</tr>
<tr>
<td>Experience city nightlife</td>
<td>10%</td>
</tr>
<tr>
<td>Experience mountains, the wilderness or the wildlife</td>
<td>9%</td>
</tr>
<tr>
<td>Observe natural phenomenon (i.e. volcanoes, northern…</td>
<td>9%</td>
</tr>
<tr>
<td>Experience national festivals and traditional celebrations</td>
<td>8%</td>
</tr>
<tr>
<td>Visit art exhibitions</td>
<td>8%</td>
</tr>
<tr>
<td>Get pampered</td>
<td>8%</td>
</tr>
<tr>
<td>Visit amusement parks</td>
<td>7%</td>
</tr>
<tr>
<td>Hiking (more than two hours)</td>
<td>7%</td>
</tr>
<tr>
<td>Visit spa resorts</td>
<td>6%</td>
</tr>
<tr>
<td>Attend concerts/festivals</td>
<td>6%</td>
</tr>
<tr>
<td>Do winter activities (Alpine skiing/snowboarding, cross…</td>
<td>3%</td>
</tr>
<tr>
<td>Fresh or salt water fishing</td>
<td>2%</td>
</tr>
</tbody>
</table>
Broadening my cultural horizon is about feeling *cultivated*, special and ahead of the pack. The segment reflects the need to *learn* about a foreign culture, stand out from the crowd and break from convention. The segment is all about being proud of one’s own special ability and competence, intellectually, culturally and materially. *Something to talk about when coming home.*
The core meaning of going on holiday is to broaden my knowledge and my horizon. I want to enrich my view on the world and discover new and interesting places. All in all I want rich experiences.

I want to go to a place with interesting culture & art and a rich cultural heritage. There must be interesting sights. The destination needs to be easy to travel to and around.

The destination needs to be cultivated, explorative and authentic.

Generally people who like to explore and have new experiences.

Sometimes I need to broaden my horizon and discover new and interesting places. I want to experience culture and art at a destination with a rich cultural heritage.
**BROADENING MY CULTURAL HORIZON**

**TYPICAL HOLIDAY OCCASIONS**
The dominant types of holiday is visits to historic sites, cultural experience (focus on art, theatre etc.), city break (cultural, shopping, Club, restaurant visits etc.), Sightseeing/round trip and holiday to experience nature, scenery and wildlife. It’s all about broadening my horizon!

**I TRAVEL TO EXPAND MY HORIZON**
These consumers want to see and learn more than other travelers. They seek destinations with a rich cultural heritage. There must be interesting sights.

**THE ROLE OF BRANDS**
The segment is important for brands which try to position themselves as creatively individualistic, unconventional, trendy and ahead of the rest, or as a tool for consumers to express their intelligence and cultural awareness.

**HOLIDAY EXPERIENCE**
These consumers you will find at historical buildings/sites, they visit cities, attend sightseeing tours and discover local culture and lifestyle. They want to visit museums and experience local architecture. Local history and legends are of high interest. You will also find them in gardens/parks, at art exhibitions and concerts/festivals.

**SOURCES OF INSPIRATIONS**
These consumers are, more than others inspired by homepages for the destination, homepages for attractions and sites, guidebooks and catalogues or brochures.
BROADENING MY CULTURAL HORIZON

Core motivations

**Emotional Benefits**
- Allows me to broaden my knowledge: 200
- Allows me to broaden my horizon: 182
- Enriches my view on the world: 180
- Allows me to discover new and interesting places: 163
- Gives me rich experiences: 161

**Social Identity**
- People who are interested to learn more: 229
- People who like to explore and have new experiences: 174

**Personality**
- Cultivated: 287
- Explorative: 173
- Authentic: 143

**Functional Characteristics**
- Has interesting culture & art: 249
- Has rich cultural heritage: 227
- Has interesting sights: 209
- Is easy to travel around: 131
- Is easy to travel to: 128
### TYPOLOGY

- **Cultural experience (focus on art, theatre etc)**: 54%
- **City break (cultural, shopping, Club, restaurant visits…)**: 50%
- **Sun & beach holiday**: 48%
- **Holiday to experience nature, scenery and wildlife**: 43%
- **Travel to cottage/holiday home**: 37%
- **Sun & beach holiday**: 37%
- **Health travel**: 33%
- **Stayed with friends / acquaintances**: 33%
- **Beach house / holiday home / flat**: 27%
- **Countryside holiday**: 24%
- **Stayed with family**: 24%
- **Countryside holiday**: 24%

### TRANSPORT AND ACCOMMODATION

#### TRANSPORT TO DESTINATION

- **Plane**: 70%
- **Car**: 21%
- **Bus**: 11%
- **Train**: 9%
- **Ferry / boat / cruise**: 7%
- **Scheduled plane**: 3%
- **Car / caravan**: 1%
- **Camper van**: 1%
- **Charter plane**: 1%

#### TRANSPORT ON DESTINATION

- **Bus**: 39%
- **Train**: 19%
- **Rented car**: 17%
- **Own car**: 14%
- **Plane**: 11%
- **Ferry / boat / cruise**: 9%
- **Bicycle**: 2%
- **Camper van**: 1%
- **Car / caravan**: 1%
- **Motorbike**: 1%
- **No transportation**: 10%
- **Other**: 12%

#### ACCOMMODATION

- **Hotel (medium standard)**: 49%
- **Hotel (high standard)**: 19%
- **Renting cabin / holiday home / flat**: 12%
- **Guest house / Bed & Breakfast**: 8%
- **Stayed with friends / acquaintances**: 7%
- **Stayed with family**: 6%
- **Caravan / camper van**: 4%
- **Stayed in a private person’s home through Airbnb or other…**: 3%
- **Caravan / camper van**: 3%

### ACTIVITIES

#### ACTIVITIES

- **Visit historical buildings/sites**: 74%
- **Visit cities**: 67%
- **Discover local culture and lifestyle**: 62%
- **Taste local food and drink**: 58%
- **Visit museums**: 50%
- **Observe beauty of nature**: 43%
- **Experience local architecture**: 41%
- **Visit restaurants**: 39%
- **Discover local history and legends**: 38%
- **Relaxation**: 37%
- **Attend sightseeing tours**: 35%
- **Shopping**: 32%
- **Visit parks and gardens**: 31%
- **Visit art exhibitions**: 23%
- **Visit the countryside**: 22%
- **Experience national festivals and traditional celebrations**: 17%
- **Experience city nightlife**: 16%
- **Experience mountains, the wilderness or the wildlife**: 15%
- **Attend concerts/festivals**: 14%
- **Sunbathing and swimming**: 13%
- **Get pampered**: 12%
- **Hiking (less than two hours)**: 12%
- **Experience city nightlife**: 11%
- **Experience mountains, the wilderness or the wildlife**: 10%
- **Attend concerts/festivals**: 9%
- **Sunbathing and swimming**: 8%
- **Get pampered**: 7%
- **Hiking (more than two hours)**: 7%
- **Visit spa resorts**: 4%
- **Visit amusement parks**: 4%
- **Fresh or salt water fishing**: 4%
- **Do winter activities (Alpine skiing/snowboarding, cross…**: 1%

### TIME OF YEAR

- **January**: 4%
- **February**: 5%
- **March**: 8%
- **April**: 8%
- **May**: 12%
- **June**: 11%
- **July**: 11%
- **August**: 12%
- **September**: 8%
- **October**: 4%
- **November**: 4%
SEGMENT PROFILE – BROADENING MY CULTURAL HORIZON

PLANNING

DECISION MADE

<table>
<thead>
<tr>
<th>Planning Period</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one week before departure</td>
<td>5%</td>
</tr>
<tr>
<td>1-3 weeks before departure</td>
<td>8%</td>
</tr>
<tr>
<td>Up to 1 month before departure</td>
<td>12%</td>
</tr>
<tr>
<td>Up to 2 months before departure</td>
<td>19%</td>
</tr>
<tr>
<td>Up to 3 months before departure</td>
<td>19%</td>
</tr>
<tr>
<td>Up to 4-6 months before departure</td>
<td>23%</td>
</tr>
<tr>
<td>More than one year before departure</td>
<td>2%</td>
</tr>
</tbody>
</table>

INFLUENCERS

<table>
<thead>
<tr>
<th>Influencer Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>54%</td>
</tr>
<tr>
<td>Friends/acquaintances/colleagues</td>
<td>22%</td>
</tr>
<tr>
<td>Nobody except myself</td>
<td>17%</td>
</tr>
<tr>
<td>Parents/other relatives</td>
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</tr>
<tr>
<td>Children 15 years and older</td>
<td>6%</td>
</tr>
<tr>
<td>Children 7-14 years</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>Children 0-6 years</td>
<td>1%</td>
</tr>
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INFORMATION SOURCES

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Internet in general</td>
<td>69%</td>
</tr>
<tr>
<td>Homepages for the destination</td>
<td>36%</td>
</tr>
<tr>
<td>Homepages for hotels/other accommodations</td>
<td>33%</td>
</tr>
<tr>
<td>Homepages for attractions and sights</td>
<td>30%</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>27%</td>
</tr>
<tr>
<td>Homepages of carriers, including airlines etc.</td>
<td>24%</td>
</tr>
<tr>
<td>Advice from friends / family</td>
<td>21%</td>
</tr>
<tr>
<td>Catalogs or brochures</td>
<td>17%</td>
</tr>
<tr>
<td>Travel apps/portals like TripAdvisor etc.</td>
<td>17%</td>
</tr>
<tr>
<td>Booking sites such as Expedia and Lastminute</td>
<td>16%</td>
</tr>
<tr>
<td>Reviews from other travelers online</td>
<td>16%</td>
</tr>
<tr>
<td>Travel agent in homeland</td>
<td>14%</td>
</tr>
<tr>
<td>Newspapers or magazines</td>
<td>14%</td>
</tr>
<tr>
<td>Internet in general</td>
<td>12%</td>
</tr>
<tr>
<td>Homepages for the destination</td>
<td>11%</td>
</tr>
<tr>
<td>Homepages for attractions and sights</td>
<td>11%</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>10%</td>
</tr>
<tr>
<td>Homepages of carriers, including airlines etc.</td>
<td>9%</td>
</tr>
<tr>
<td>Advice from friends / family</td>
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</tr>
<tr>
<td>Catalogs or brochures</td>
<td>8%</td>
</tr>
<tr>
<td>Travel apps/portals like TripAdvisor etc.</td>
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</tr>
<tr>
<td>Booking sites such as Expedia and Lastminute</td>
<td>6%</td>
</tr>
<tr>
<td>Reviews from other travelers online</td>
<td>5%</td>
</tr>
<tr>
<td>Travel agent in homeland</td>
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</tr>
<tr>
<td>Newspapers or magazines</td>
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</tr>
<tr>
<td>Internet in general</td>
<td>5%</td>
</tr>
<tr>
<td>Homepages for the destination</td>
<td>5%</td>
</tr>
<tr>
<td>Homepages for attractions and sights</td>
<td>5%</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>2%</td>
</tr>
<tr>
<td>Homepages of carriers, including airlines etc.</td>
<td>2%</td>
</tr>
<tr>
<td>Advice from friends / family</td>
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</tr>
<tr>
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<tr>
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<td>2%</td>
</tr>
<tr>
<td>Newspapers or magazines</td>
<td>2%</td>
</tr>
<tr>
<td>Internet in general</td>
<td>2%</td>
</tr>
</tbody>
</table>

TRAVEL COMPANIONS

WHO DID YOU TRAVEL WITH

- Spouse/partner: 68%
- Friends: 21%
- Other family/relatives: 15%
- Children 15 years and above: 9%
- Children 7-14 years: 7%
- Alone: 6%
- Other people: 4%
- Children 0-6 years: 3%

NUMBER OF TRAVEL COMPANIONS

- 0: 1%
- 1: 15%
- 2: 39%
- 3: 11%
- 4: 13%
- 5 or more: 20%

HOW DID YOU TRAVEL

- I/we travelled in a group with an organized tour: 25%
- I/we had the trip organized by others and travelled independently: 10%
- I/we organized the trip myself/ourselves and travelled independently: 63%
- Don't know: 3%

TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

- 1 time: 12%
- 2 to 3 times: 43%
- 4 to 5 times: 20%
- 6 times or more: 24%

Significantly over indexed in segment
Significantly under indexed in segment
Exploring the world of natural beauty is about feeling unique, daring and adventurous. The segment reflects the need to see something new, something spectacular like a natural phenomenon. It also connects with the need to immerse in unspoiled nature and travel to a destination not ruined by tourism. Staying ahead of the “charter pack”. The segment is all about being proud of one’s ability to “go where no one has gone before”.
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to broaden my knowledge and my horizon. I want to enrich my view on the world and discover new and interesting places. A place that allows me to immerse myself in the local life. All in all I want rich experiences and new inspiration.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?
I want to go to a place that is not ruined by tourism. It has unspoiled nature and allow me to live close to nature. I want quiet environments and beautiful nature. A destination that has good opportunities to meet local people and also interesting sights. A rich cultural heritage would also be good.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be adventurous, daring, unique, explorative, authentic and active.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people who like adventure and wants a life changing experience. People who want to make a different choice and do things the unconventional way. People who like to explore and have new experiences and are interested to learn more.
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

TYPICAL HOLIDAY OCCASIONS
The most common holiday type is a holiday to experience nature, scenery and wildlife. They are also over indexing on sport/active holiday.

I TRAVEL TO SOMETHING UNIQUE
These consumers choose destinations that makes them feel adventurous and daring. They want to experience something unique. They want to travel to places that are fuelling their explorative side.

THE ROLE OF BRANDS
The segment is important for brands which try to position themselves as creatively individualistic, unconventional, trendy and ahead of the rest, or as a tool for consumers to express their uniqueness, seeing something others has not seen. Also act as a tool for consumers to express their environmental awareness. A sustainable destination, not ruined by tourism.

HOLIDAY EXPERIENCE
This is a very active segment. They want to observe beauty of nature and natural phenomenon, discover local culture and lifestyle, experience mountains, the wilderness or the wildlife, discover local history and legends, visit the countryside and also experience national festivals and traditional celebrations.

SOURCES OF INSPIRATIONS
This segment seek their information for homepages for the destination, carriers and attractions and sights. They also use guidebooks and read reviews from other travelers online. Catalogues or brochures are also popular.
ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Core motivations

Emotional Benefits
- Allows me to immerse myself in the local life: 260
- Enriches my view on the world: 162
- Allows me to broaden my horizon: 152
- Gives me rich experiences: 144
- Allows me to broaden my knowledge: 142
- Allows me to discover new and interesting places: 144
- Gives me new inspiration: 142

Social Identity
- People who like adventure: 304
- People who wants a life changing experience: 255
- People who want to make a different choice: 197
- People that like to do things the unconventional way: 187
- People who like to explore and have new experiences: 165
- People who are interested to learn more: 147

Personality
- Adventurous: 309
- Daring: 296
- Unique: 207
- Explorative: 183
- Authentic: 161
- Active: 144

Functional Characteristics
- Is not ruined by tourism: 206
- Has unspoiled nature: 201
- Allows me to live close to nature: 196
- Has beautiful nature: 165
- Has good opportunities to meet local people: 155
- Has quiet environments: 126
- Has interesting sights: 126
- Has rich cultural heritage: 123
**SEGMENT PROFILE – ADVENTURES IN THE WORLD OF NATURAL BEAUTY**

### TYPOLOGY

**TYPE OF HOLIDAY**
- Holiday to experience nature, scenery and wildlife
- Visits to historic sites
- Sightseeing/round trip
- Sun and beach holiday
- Cultural experience (focus on art, theatre etc)
- City break (cultural, shopping, Club, restaurant visits)
- Visiting friends and relatives
- Sports/active holiday
- Culinary trip
- Party & fun
- Travel to cottage/holiday home
- Countryside holiday
- Event holiday (festivals, sports etc)
- Cruise
- Ski holiday
- Other type of winter holiday with snow
- Health travel

**DURATION**
- 3 to 4 days
- 5 to 6 days
- 7 to 8 days
- 9 to 14 days
- 15 or more days

**TIME OF YEAR**
- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

### TRANSPORT AND ACCOMMODATION

#### TRANSPORT TO DESTINATION

<table>
<thead>
<tr>
<th>Mode</th>
<th>Significantly over indexed in segment</th>
<th>Significantly under indexed in segment</th>
</tr>
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<tbody>
<tr>
<td>Plane</td>
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<td>71%</td>
</tr>
<tr>
<td>Car</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Bus</td>
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<td>6%</td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Train</td>
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<td>1%</td>
</tr>
<tr>
<td>Scheduled plane</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Camper van</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Car w/ caravan</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Charter plane</td>
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<td>1%</td>
</tr>
<tr>
<td>Motortruck</td>
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#### TRANSPORT ON DESTINATION

<table>
<thead>
<tr>
<th>Mode</th>
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<tr>
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</tr>
<tr>
<td>Rented car</td>
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<td>12%</td>
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<tr>
<td>Plane</td>
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<td>12%</td>
</tr>
<tr>
<td>Own car</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Train</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
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<td>3%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Camper van</td>
<td>3%</td>
<td>2%</td>
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<tr>
<td>Car w/ caravan</td>
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<td>2%</td>
</tr>
<tr>
<td>No transportation</td>
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#### ACCOMMODATION

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</tr>
</thead>
<tbody>
<tr>
<td>Hotel (medium standard)</td>
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<td>20%</td>
</tr>
<tr>
<td>Hotel (high standard)</td>
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<td>42%</td>
</tr>
<tr>
<td>Hotel (budget)</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Guest house / Bed &amp; Breakfast</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Rented cabin / holiday home / flat</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Stayed with friends / acquaintances</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>In private person’s home through Airbnb or other...</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Tent</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Stayed with family</td>
<td>4%</td>
<td>4%</td>
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<tr>
<td>Caravan / camper van</td>
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<td>4%</td>
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<tr>
<td>Camping cabin</td>
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<td>3%</td>
</tr>
<tr>
<td>Borrowed cabin / holiday home / flat</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Owned cabin / holiday home / flat</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### ACTIVITIES

#### ACTIVITIES

- Observe beauty of nature
- Experience mountains, the wilderness or wildlife
- Visit parks and gardens
- Sunbathing and swimming
- Experience national festivals and traditional celebrations
- Visit the countryside
- Visit cities
- Visit museums
- Attend sightseeing tours
- Experience local architecture
- Visit restaurants
- Visit art exhibitions
- Get pampered
- Attend concerts/festivals
- Visit spa resorts
- Visit amusement parks
- Visit art exhibitions
- Experience city nightlife
- Do winter activities (Alpine skiing/snowboarding, cross-country skiing, ski hire)
- Visits to historic sites
Romantic luxury is about the need to indulge in some luxury. Find those romantic spots that really creates a feeling of extravagance. It relates to the desire to feel on top of the world. The segment reflects that I want the best and are willing to pay for it.
EXTRAVAGANT INDULGENCE

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to allow me to indulge myself with a bit of luxury. I want a vacation that makes me feel on top of the world.

DESTINATION FEATURES AND ACTIVITIES; WHAT AM I LOOKING FOR?
I want to go to a place that has romantic spots. Good shopping and good service is important. I want a destination that is well organized. Of course it needs to have a variety of different restaurant offers.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be extravagant, superior, classy and unique.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people who is sophisticated and classy. People who want the best and are willing to pay for it. Basically people who like to have the best things and value high quality.

SHARE OF OVERNIGHT STAYS

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<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>18-24</td>
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<tr>
<td>25-29</td>
<td>16%</td>
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<tr>
<td>30-39</td>
<td>30%</td>
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<td>40-49</td>
<td>17%</td>
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<tr>
<td>50-59</td>
<td>10%</td>
</tr>
<tr>
<td>60-65</td>
<td>6%</td>
</tr>
<tr>
<td>Older than 65 years</td>
<td>11%</td>
</tr>
</tbody>
</table>

56% are below 40 years

40%

60%

Sometimes I need to indulge my self with a bit of luxury and feel on top of the world. I need a destination with romantic spots.
EXTRAVAGANT INDULGENCE

TYPICAL HOLIDAY OCCASIONS
You will find most of the typical sun and beach vacations in this segment, but you will find ski/active holidays, cruise, health travel and culinary trips. Although, most of the time it’s all about romance!

HOLIDAY EXPERIENCE
These consumers over index on spa resorts and visits to amusements parks. They want their romantic spots which they can find both in cities and in traditional beach resorts. They often rent a car for their romantic getaways. They stay at high standard hotels more than in other segments.

I TRAVEL FOR ROMANCE AND LUXURY
These consumers choose destinations that enables them to indulge in a bit of luxury. Although most of the trips are in summertime it can even be in the winter. They often travel on organized tours or have others plan for them and travel independently.

SOURCES OF INSPIRATIONS
These consumers don’t spend a lot of time planning. 42% of them settle for the trip less than four weeks before they go. They get inspired by social media or articles in newspapers or magazines. They also browse the internet in general to get luxurious romantic inspiration. They travel with their partner and gets inspired by him or her.

THE ROLE OF BRANDS
The segment is important for brands trying to position themselves as premium, high-class and powerful. It appeals to the need to be respected and revered, to feel strong and ‘on-top-of-the-world’. It is also an important dimension for brands who want to be perceived as exclusive and only available for the lucky few.
EXTRAVAGANT INDULGENCE

Core motivations

Emotional Benefits
- Allows me to indulge myself with a bit of luxury: 198
- Makes me feel on top of the world: 155

Social Identity
- People who are sophisticated and classy: 364
- People who want the best and are willing to pay for it: 303
- People who like to have the best things, value high quality: 262

Personality
- Extravagant: 486
- Superior: 433
- Classy: 397
- Unique: 126

Functional Characteristics
- Has romantic spots: 160
- Has good shopping: 148
- Is well organized: 128
- Has good service: 128
- Has a variety of different restaurant offers: 124
SEGMENT PROFILE – EXTRAVAGANT INDULGENCE

**TYPOLOGY**

**TYPE OF HOLIDAY**
- Sun and beach holiday
- Visits to historic sites
- Sightseeing/round trip
- Cultural experience (focus on art, theatre etc)
- Holiday to experience nature, scenery and wildlife
- City break (cultural, shopping, Club, restaurant visits)
- Visiting friends and relatives
- Culinary trip
- Party & fun
- Sports/active holiday
- Ski holiday
- Travel to cottage/holiday home
- Event holiday (festivals, sports etc)
- Other type of winterholiday with snow
- Countryside holiday
- Cruise

**DURATION**
- 3 to 4 days: 23%
- 5 to 6 days: 22%
- 7 to 8 days: 20%
- 9 to 14 days: 20%
- 15 or more days: 14%

**TIME OF YEAR**
- Jan: 6%
- Feb: 9%
- Mar: 9%
- Apr: 8%
- May: 11%
- Jun: 9%
- Jul: 10%
- Aug: 12%
- Sep: 9%
- Oct: 7%
- Nov: 4%
- Dec: 6%

**TRANSPORT AND ACCOMMODATION**

**TRANSPORT TO DESTINATION**
- Plane: 67%
- Car: 31%
- Ferry / boat / cruise: 8%
- Train: 7%
- Camper van: 6%
- Car w/ caravan: 5%
- Scheduled plane: 4%
- Charter plane: 3%
- Motorcycle: 3%

**TRANSPORT ON DESTINATION**
- Rented car: 30%
- Bus: 23%
- Plane: 19%
- Train: 11%
- Car w/ caravan: 9%
- Camper van: 6%
- Bicycle: 5%
- Motorbike: 4%
- No transportation: 3%
- Other: 6%

**ACCOMMODATION**
- Hotel (medium standard): 37%
- Hotel (high standard): 33%
- Hotel (budget): 16%
- Rented cabin / holiday home / flat: 12%
- Guest house / Bed & Breakfast: 12%
- Borrowed cabin / holiday home / flat: 11%
- In a private person’s home through Airbnb or other: 7%
- Owned cabin / holiday home / flat: 6%
- Stayed with friends / acquaintances: 6%
- Camping cabin: 5%
- Stayed with family: 4%
- Tent: 3%
- Caravan / camper van: 2%

**ACTIVITIES**

**AC TIVITIES**
- Relaxation: 52%
- Visit cities: 43%
- Taste local food and drink: 43%
- Visit restaurants: 38%
- Observe beauty of nature: 36%
- Visit historical buildings/sites: 34%
- Shopping: 30%
- Discover local culture and lifestyle: 30%
- Attend sightseeing tours: 21%
- Discover local history and legends: 19%
- Experience local architecture: 18%
- Sunbathing and swimming: 18%
- Visit museums: 17%
- Visit parks and gardens: 17%
- Visit the countryside: 17%
- Experience city nightlife: 16%
- Hiking (less than two hours): 14%
- Get pampered: 12%
- Observe natural phenomenon (i.e. volcanoes, northern lights): 12%
- Visit spa resorts: 10%
- Experience national festivals and traditional celebrations: 10%
- Visit art exhibitions: 10%
- Experience mountains, the wilderness or the wildlife: 9%
- Visit amusement parks: 9%
- Attend concerts/festivals: 8%
- Hiking (more than two hours): 6%
- Fresh or salt water fishing: 3%
- Do winter activities (Alpine skiing/snowboarding, cross-country skiing etc): 3%
SEGMENT PROFILE - EXTRAVAGANT INDULGENCE

PLANNING

DECISION MADE

<table>
<thead>
<tr>
<th>Time before departure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one week before departure</td>
<td>7%</td>
</tr>
<tr>
<td>1-3 weeks before departure</td>
<td>14%</td>
</tr>
<tr>
<td>Up to 1 month before departure</td>
<td>21%</td>
</tr>
<tr>
<td>Up to 2 months before departure</td>
<td>19%</td>
</tr>
<tr>
<td>Up to 3 months before departure</td>
<td>15%</td>
</tr>
<tr>
<td>Up to 4-6 months before departure</td>
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</tr>
<tr>
<td>More than one year before departure</td>
<td>2%</td>
</tr>
</tbody>
</table>

INFLUENCERS

<table>
<thead>
<tr>
<th>Influence Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>57%</td>
</tr>
<tr>
<td>Friends/acquaintances/colleagues</td>
<td>19%</td>
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<td>Other</td>
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</tbody>
</table>

INFORMATION SOURCES

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet in general</td>
<td>61%</td>
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<tr>
<td>Homepages for hotels/other accommodations</td>
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<td>5%</td>
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<tr>
<td>Other</td>
<td>3%</td>
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TRAVEL COMPANIONS

WHO DID YOU TRAVEL WITH

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<thead>
<tr>
<th>Companion Type</th>
<th>Percentage</th>
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NUMBER OF TRAVEL COMPANIONS

<table>
<thead>
<tr>
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<th>Percentage</th>
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</thead>
<tbody>
<tr>
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<td>1%</td>
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<tr>
<td>1</td>
<td>11%</td>
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<tr>
<td>2</td>
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<td>15%</td>
</tr>
<tr>
<td>5 or more</td>
<td>20%</td>
</tr>
</tbody>
</table>

HOW DID YOU TRAVEL

<table>
<thead>
<tr>
<th>Travel Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I/we travelled in a group with an organized tour</td>
<td>36%</td>
</tr>
<tr>
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</tr>
<tr>
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</tr>
<tr>
<td>Don't know</td>
<td>3%</td>
</tr>
</tbody>
</table>

TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 time</td>
<td>8%</td>
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<tr>
<td>2 to 3 times</td>
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<td>21%</td>
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<tr>
<td>6 times or more</td>
<td>31%</td>
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</tbody>
</table>

Significantly over indexed in segment
Significantly under indexed in segment
Energy is about adventure, being active, testing your boundaries and discovering new things. It taps into the need to be energized. Energy is all about being active and experiencing the freedom, passion, and adventure that comes with activities. Buzzing about, spending energy, and feeling very much alive and kicking.
ENERGY

SOMETIMES I NEED A HOLIDAY THAT GIVES ME ENERGY AND NEW INSPIRATION. I NEED A DESTINATION WITH A WIDE RANGE OF ACTIVITIES THAT KEEPS ME PHYSICAL ACTIVE.

EMOTIONAL BENEFITS; WHAT SHOULD THE HOLIDAY GIVE ME?
The core meaning of going on holiday is to feel full of energy. A holiday should give me new inspiration. Of course it should create precious moments of togetherness and help me to enjoy life to the fullest.

DESTINATION; WHAT AM I LOOKING FOR?
I want to go to a place that offers a wide range of possible activities also for kids. A destination that allows me to be physical active.

PERSONALITY; WHAT SHOULD IT STAND FOR?
The destination needs to be active, adventurous and explorative.

SOCIAL IDENTITY; HOW SHOULD IT REFLECT UPON ME?
The destination should be for people who want to have as much fun as possible in life, and like to do things spontaneously, impulsively. People who like adventure. People who have an active and busy social life, and who enjoy spending time with friends.

24% ARE BELOW 30 YEARS
48% 52%
SHARE OF OVERNIGHT STAYS 9%

Older than 65 years 13%
ENERGY

TYPICAL HOLIDAY OCCASIONS
As in most segments you will find the typical sun and beach vacation in this segment, but you will also find ski/active holidays and party and fun!

I TRAVEL TO GET ENERGY
These consumers choose destinations that enables them to live life to the fullest. They often travel in larger groups (4 or more) with friends and with children, so the social element is also important. Many of them travel by car and they stay at a rented cabin/holiday home. More than in other segments they travel in wintertime.

HOLIDAY EXPERIENCE
More than in other segments you will find activities like hiking, winter activities (Alpine skiing/snowboarding, cross country skiing, dog-sleigh, snowmobile etc.) and visits to amusement parks. And of course they enjoy relaxation, observe beauty of nature and taste local food and drink as much as the next man.

SOURCES OF INSPIRATIONS
These consumers don’t spend a lot of time planning where to go. Most of them settle for the trip less than 2 months before they go. Their main source of information is the internet in general. I.e. it will be important to use search engines as a vehicle to reach this segment. Their children, friends and acquaintances heavily influences their choice.

THE ROLE OF BRANDS
The energy segment is important for brands who position themselves as vital and energetic and who are always pushing the boundaries and stimulating consumers with change and challenge. A brand that wants to adopt a Vitality strategy needs to position itself as inquisitive and curious about the world, a brand that is entertaining, surprising and sometimes perhaps even shocking for its (temporary) consumers. It is important for these brands to offer constant renewal.
ENERGY

Core motivations

**Emotional Benefits**
- Makes me feel full of energy: 168
- Gives me new inspiration: 128
- Creates precious moments of togetherness: 124
- Helps me to enjoy life to the fullest: 121

**Social Identity**
- People who want to have as much fun as possible in life: 148
- People who like adventure: 145
- People who have an active and busy social life: 142
- People that like to do things spontaneously, impulsively: 135
- People who enjoy spending time with friends: 127

**Personality**
- Active: 210
- Adventurous: 176
- Explorative: 127

**Functional Characteristics**
- Offers a wide range of possible activities: 377
- Has activities for kids: 313
- Allows me to be physically active: 310
### TYPOLOGY

#### TYPE OF HOLIDAY

- Sun and beach holiday: 57%
- Holiday to experience nature, scenery and wildlife: 53%
- Visits to historic sites: 46%
- Sightseeing/round trip: 45%
- City break (cultural, shopping, Club, restaurant visits etc): 43%
- Cultural experience (focus on art, theatre etc): 40%
- Visiting friends and relatives: 32%
- Sports/active holiday: 27%
- Ski holiday: 22%
- Party & fun: 20%
- Culinary trip: 18%
- Travel to cottage/holiday home: 16%
- Event holiday (festivals, sports etc): 11%
- Other type of winter holiday with snow: 10%
- Health travel: 10%
- Countryside holiday: 10%
- Cruise: 9%

#### DURATION

- 3 to 4 days: 19%
- 5 to 6 days: 20%
- 7 to 8 days: 26%
- 9 to 14 days: 20%
- 15 or more days: 15%

#### TIME OF YEAR

<table>
<thead>
<tr>
<th>Month</th>
<th>6%</th>
<th>10%</th>
<th>9%</th>
<th>10%</th>
<th>8%</th>
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</table>

### TRANSPORT AND ACCOMMODATION

#### TRANSPORT TO DESTINATION

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Frequency</th>
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</thead>
<tbody>
<tr>
<td>Plane</td>
<td>28%</td>
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<tr>
<td>Car</td>
<td>24%</td>
</tr>
<tr>
<td>Bus</td>
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<tr>
<td>Train</td>
<td>14%</td>
</tr>
<tr>
<td>Ferry / boat / cruise</td>
<td>12%</td>
</tr>
<tr>
<td>Car / van</td>
<td>10%</td>
</tr>
<tr>
<td>Camper van</td>
<td>8%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>5%</td>
</tr>
</tbody>
</table>

#### ACCOMMODATION

- Hotel (medium standard): 18%
- Hotel (high standard): 17%
- Rented cabin / holiday home / flat: 14%
- Hotel (budget): 14%
- Guest house / Bed & Breakfast: 10%
- Staying with friends / acquaintances: 6%
- Stayed with family: 5%
- In a private person’s home through Airbnb or other: 4%
- Owned cabin / holiday home / flat: 3%
- Borrowed cabin / holiday home / flat: 3%
- Tent: 3%
- Camping cabin: 3%
- Caravan / camper van: 2%

### ACTIVITIES

#### ACTIVITIES

- Relaxation: 52%
- Observe beauty of nature: 44%
- Visit cities: 42%
- Visit restaurants: 39%
- Visit historical buildings/sites: 35%
- Visit local culture and lifestyle: 31%
- Visit local culture and lifestyle: 29%
- Shopping: 27%
- Sunbathing and swimming: 23%
- Hiking (less than two hours): 22%
- Visit parks and gardens: 20%
- Visit the countryside: 19%
- Experience mountains, the wilderness or the wildlife: 19%
- Attend sightseeing tours: 18%
- Discover local history and legen: 17%
- Visit museums: 17%
- Experience local architecture: 16%
- Hiking (more than two hours): 15%
- Observe natural phenomenon (i.e. volcanoes, northern lights): 14%
- Experience city nightlife: 13%
- Do winter activities (Alpine skiing/snowboarding, cross-country skiing): 12%
- Visit amusement parks: 12%
- Experience national festivals and traditional celebrations: 10%
- Get pampered: 10%
- Visit art exhibitions: 9%
- Attend concerts/festivals: 8%
- Visit spa resorts: 8%
- Fresh or salt water fishing: 4%
SEGMENT PROFILE - ENERGY

PLANNING

DECISION MADE

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one week before departure</td>
<td>6%</td>
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<tr>
<td>1-3 weeks before departure</td>
<td>12%</td>
</tr>
<tr>
<td>Up to 1 month before departure</td>
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<tr>
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TRAVEL COMPANIONS

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HOW DID YOU TRAVEL

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<th>Percentage</th>
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TRAVEL FREQUENCY (NUMBER OF TIMES ABROAD)

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<tr>
<td>4 to 5 times</td>
<td>22%</td>
</tr>
<tr>
<td>6 times or more</td>
<td>32%</td>
</tr>
</tbody>
</table>
BRAND PROFILE OF NORWAY

Associations
- Emotional benefits associated with Norway
- Destination characteristics associated with Norway
- Brand personality associated with Norway
- Social identity associated with Norway
HOW NORWAY IS PERCEIVED AS A HOLIDAY DESTINATION

**EMOTIONAL BENEFITS**

**WHY** do people go on holiday to Norway?

- Allows me to discover new and interesting places: 54%
- Gives me rich experiences: 50%
- Allows me to broaden my knowledge: 47%
- Allows me to broaden my horizon: 47%
- Enriches my view on the world: 46%
- Helps me to escape from my hectic daily life: 44%
- Allows me to share good times with others: 44%

**DESTINATION CHARACTERISTICS**

**WHAT** associations are related to specific destination characteristics in Norway?

- Has beautiful nature: 65%
- Is not too warm: 61%
- Has unspoiled nature: 57%
- Has quiet environments: 56%
- Allows me to live close to nature: 54%
- Has interesting sights: 54%

**SOCIAL IDENTITY**

**HOW** does a holiday to Norway reflect upon me?

- People who like to explore and have new experiences: 40%
- People who are interested to learn more: 39%
- People who like adventure: 37%
- People who want to escape from the demands of life and relax and unwind: 36%
- People who needs time for themselves: 34%
- People who want to revitalize themselves: 33%
- People who enjoy spending time with friends: 31%
Norway does not have a very strong emotional footprint. It lacks a clear reason why at least outside of Sweden & Denmark. In these last two countries Norway is associated with no surprises and a safe feeling as well as energizing.
People are generally very clear on what to expect in terms of functional delivery: unspoiled nature, isolated, well organized and generally safe
Norway does not have a consistent strong global footprint when it comes to social identity.

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

But across more distant markets Norway is seen as a destination for people who like adventure and to explore. People who like to have the best things, who value high quality.
Across most countries Norway is seen as peaceful & fresh. More distant markets see Norway as more adventurous, more for explorative people.

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

For none of the markets is Norway seen as very lively, playful or social. It’s not a place for extravagance and partying. It also lacks sophistication – not authentic, not cultivated.
China and to a lesser extent the USA are a bit more clueless about Norway (in general); for them it’s a very exotic destination – off the beaten track.
## NORWAY’S FIT TO SEGMENTS IN ALL MARKETS

### A clear fit to «Exploring the world of natural beauty» in most markets

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**Good fit**

**Neutral fit**

**Bad fit**
SOME CHANGES IN THE GERMAN MARKET

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

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

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

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

Top 5 personality items
1. Friendly
2. Peaceful
3. Authentic
4. Active
5. Cultivated and Open-minded
SOME CHANGES IN THE DUTCH MARKET

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

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

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

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

BUT Norway’s personality has evolved. Norway is seen as more relaxed, daring, authentic and friendly than in 2011.
5

THE COMPETITIVE LANDSCAPE

Visits and repeat visits
Strengths and weaknesses
NORWAY’S ANCHOR POINT IN THE CATEGORY FRAME SUGGEST A CLOSE CONNECTION TO THE GREEN DIMENSION

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

WHAT THIS WILL TELL YOU:

- Them most common association to Norway is, for most of the markets, related to the needs in the green dimension.

- There will be local market differences so please refer to local country reports, when assessing Norway’s position in each specific market.
LOOKING OUTSIDE NORWAY’S TRADITIONAL COMPETITIVE SPACE, YOU WILL FIND OTHER DESTINATIONS COMPETING FOR THE SAME NEEDS

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

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CONCLUSION AND RECOMMENDATIONS

Brand positioning
The strategy to make Norway occupy a unique and credible position, relative to competing destinations, in the mind of the tourist.
**In Conclusion...**

**Norway Needs to Diversify Its Relevance as a Holiday Destination**

1. **We see a further fragmentation of needs in the holiday segmentation**
   - We have 9 decent size segments today
   - There are important differences by market

2. **Norway connects reasonably well with multiple needs**
   - Highly relevant for one segment
   - Relevance for additional 5 segments

3. **It's the only way to stay competitive**
   - Competitive destinations too are playing on multiple needs
   - Nature is a highly competitive area

4. **Norway has a lot to offer**
   - Norway is already associated with a wide variety of holiday needs & activities
   - The whole of Norway, the whole year round
We have 9 decent size segments today (vs only 5 >6% in 2011)
WE SEE A FURTHER FRAGMENTATION OF HOLIDAY NEEDS

There are a lot of differences in size by market

**TOP 3 (% overnight stays*)**

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

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

NORWAY

- BROADENING MY CULTURAL HORIZON: 0.06
- EXTRAVAGANT INDULGENCE: -0.13
- ESCAPE: 0.22
- ADVENTURES IN THE WORLD OF NATURAL BEAUTY: 0.28
- SHARING & CARING: -0.22
- CONTROL: 0.03
- ENERGY: -0.03
- PLAYFUL LIBERATION: -0.06
- SOCIAL IMMERSION: -0.16

Fit with segments
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Nature is a highly competitive area

New Zealand: 0.63
Iceland: 0.61
South Africa: 0.57
Canada: 0.34
Scotland: 0.31
Norway: 0.28
Finland: 0.22
Sweden: 0.06

ADVENTURES IN THE WORLD OF NATURAL BEAUTY

Fit with Exploring the World of Natural Beauty
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs
DIVERSIFICATION IS NECESSARY TO STAY COMPETITIVE

Competitive destinations too are playing on multiple needs.
NORWAY HAS A LOT TO OFFER

Norway is used for a wide variety of holiday needs & activities

- Observe beauty of nature: 63%
- Relaxation: 52%
- Visit historical buildings/sites: 38%
- Discover local culture and lifestyle: 38%
- Visit cities: 36%
- Taste local food and drink: 35%
- Experience mountains, the wilderness or the wildlife: 31%
- Observe natural phenomenon (i.e. volcanoes, northern lights, ...): 29%
- Visit the countryside: 27%
- Hiking (less than two hours): 26%
- Attend sightseeing tours: 24%
- Visit museums: 24%
- Visit restaurants: 22%

Base: holidays to Norway
NORWAY HAS A LOT TO OFFER

This fits with the ambition to promote “the whole of Norway, the whole year round”
RECOMMENDATIONS

Where do we go from here?
LOOKING AT NORWAY’S CURRENT STRENGTHS AND POSITION DIFFERENT ROUTES THAT CAN BE EXPLORED

THE OBVIOUS TARGET

ADVENTURES IN THE WORLD OF NATURAL BEAUTY

POSSIBLE ADDITIONS

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

Especially for the US.

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

No destination seems to be especially strong in this segment. It’s a white space.
Norway fails to meet some basic holiday expectations in the category, i.e. across segments globally.

**NORWAY NEEDS TO CONTINUE TO WORK ON HOLIDAY BASICS**

**IMPROVE/BE MORE OF**

- Good value for money
- Interesting, rich cultural heritage or art
- Social, friendly
- Good local cuisine

**SUSTAIN PERFORMANCE**

- Beautiful nature
- Peaceful
- For Explorers
Norway needs to get more emotional on a global scale

**Strengthen the emotional benefits**
Resonate better with the global tourist
Norway has a very **weak emotional position** in this segment. Focus on providing **rich experiences** and the discovery of **new and interesting places**.

**Destination features are strong**
Maintain and develop
Maintain everything that has to do with **nature** and **environment/sustainability**. Develop the association to **interesting sights** and the possibility to **meet local people**.

**Personality associations are slim**
Create one that is more relevant
Keep on maintaining “**Fresh**” and “**Active**”. Become more “**Adventurous**” and “**Daring**”.

**Weak social identity**
Strengthening is needed
Strengthen the perception of Norway as a destination for people who like **adventure** and focus on creating a **life changing experience**.
QUESTIONS?

Please contact...

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