



Optima report Holland

Short version

Vi gir lokale ideer globale muligheter

Background to the Optima studies

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

For more info about the survey:

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

Executive summary

- Fundamental meaning of going on holiday - Holidays abroad must always help people to escape from their daily lives! The core of all holidays is about escapism, discovering new and interesting places and being together. All holidays must fulfil these criteria regardless of the type of holiday
- The proportion of people who have ever visited Norway is low compared to other competing destinations . However Norway is the most frequently considered Scandinavian holiday destination in Holland. This demonstrates that Norway has unrealized potential
- All the Scandinavian countries are seen as expensive and environmentally friendly. Positive and distinguishing features for Norway compared to the other Scandinavian countries are adventurous, enriching and fresh, but Norway is seen as less social and comfortable
- Norway does not have a good fit with any of the motivational segments identified in the study, but is best positioned in the exploration segment. For active holidays, liberation and exploration is the two key segments
- The main target group for Norway is Explorers. They are looking to discover new territories and gain new energy. At the same time, broadening their horizons and feeling enriched

Fundamental meaning of going on holiday

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

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

The core of all holidays is about:

Escapism

**New and
interesting
places**

Being together

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

Why identifying main motivation for travelling?

The same person, but different situations and different motivations

As consumers, we often have different needs depending on the situation. This also applies to holidays. A weekend getaway with a partner has to fulfil different needs than a skiing weekend with friends. This report is, therefore, based on **different occasions** – by occasion we mean **different holidays**.



Why identifying main motivation for travelling?

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

20% **Conscious**

80%

Sub-conscious

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

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

The Censydiam model

Main motivation for travelling abroad

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



Norway is best positioned with Exploration

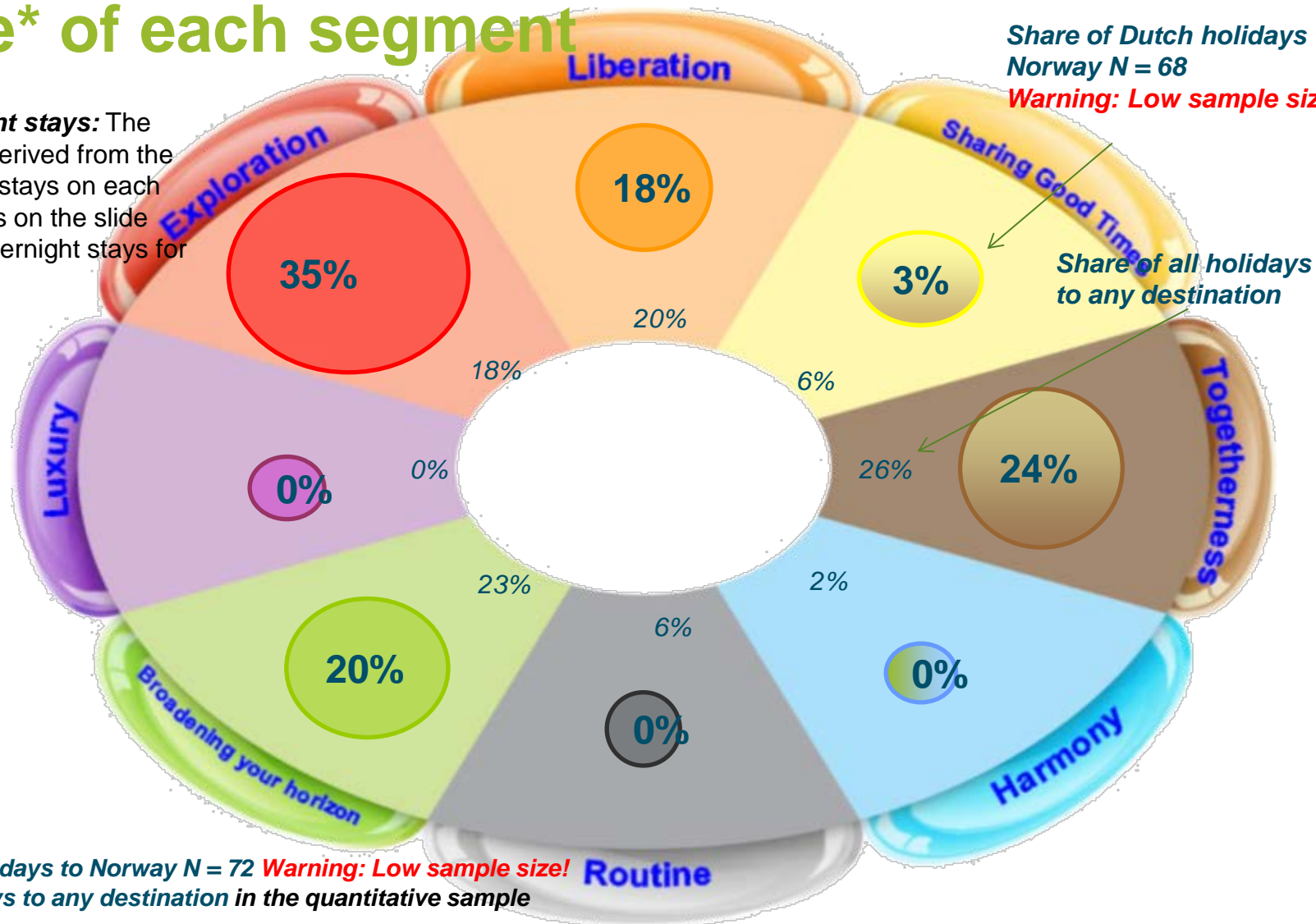


- Norway does not clearly 'own' any motivational segment
- However Norway is often associated with Exploration
- Exploration is also the main reason why Dutch travellers come to Norway today (warning: low sample size!)
- Our neighboring countries and strongest competitors have a weak association for exploration
 - ⇒ But the strength of this association for Norway is also relatively weak
- Exploration:
 - Emotional benefits sought by the tourist: Gives me rich experiences, Discover new and interesting places, Escape from my hectic daily life and Enrich my view of the world
 - Personality of the destinations: Adventurous, Explorative, Unique, Active and Friendly

Dutch holidays to Norway + all holidays to any destination from the Netherlands

The size* of each segment

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



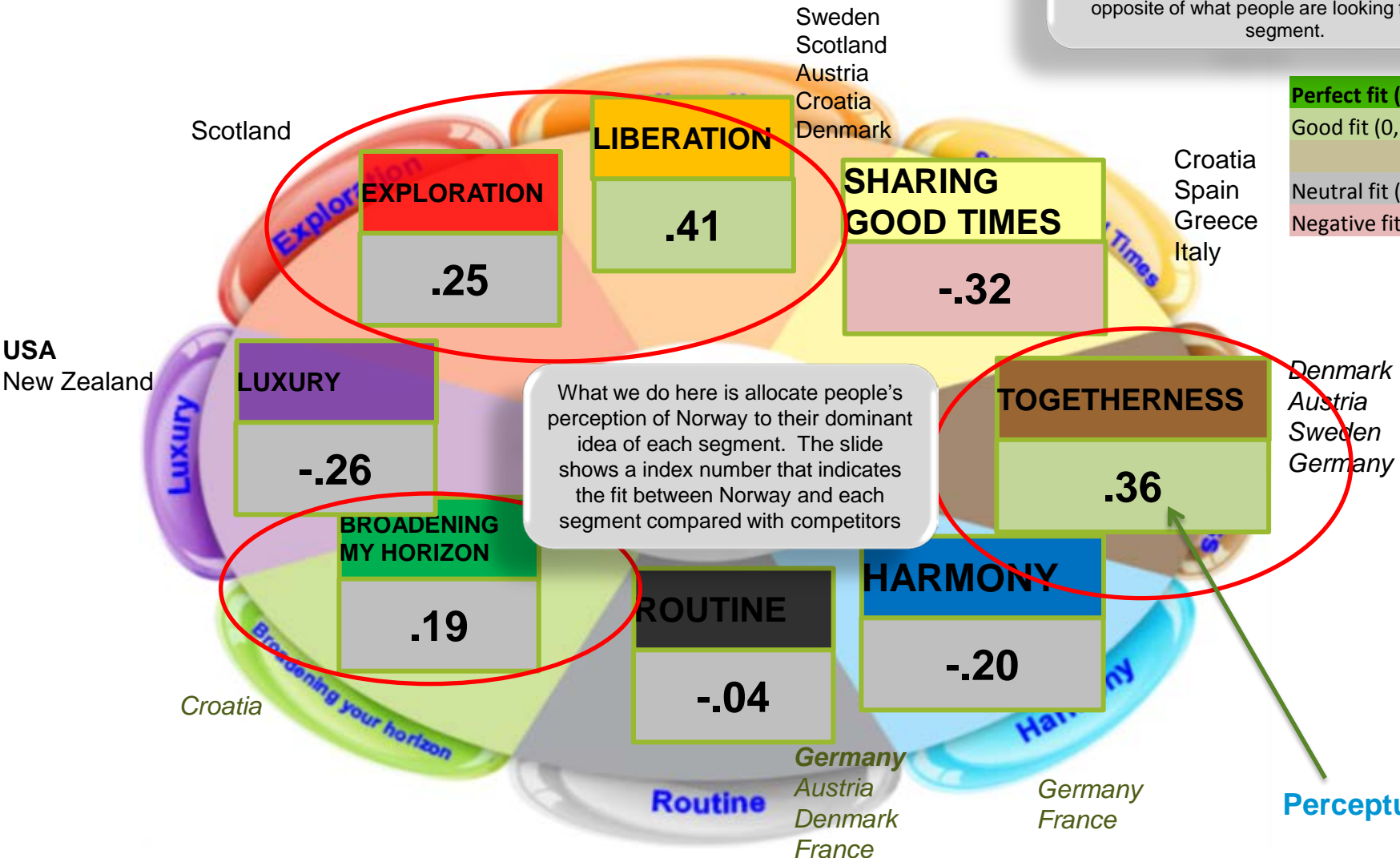
Norway has a fragmented brand footprint – Not perfect fit with any segments

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

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

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

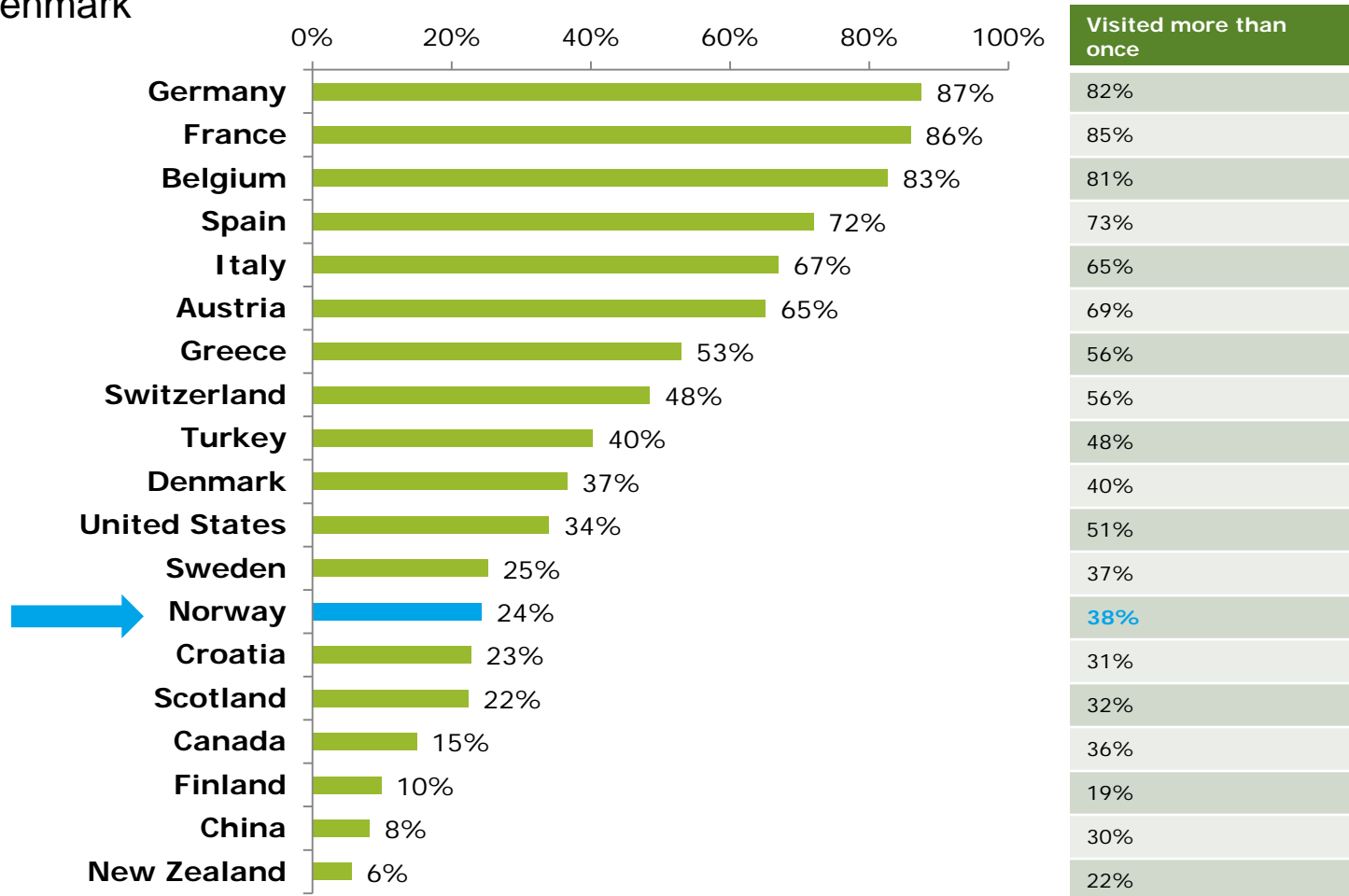
Perceptual fit



Visited destinations in Holland

Norway fails to attract a lot of Dutch visitors...

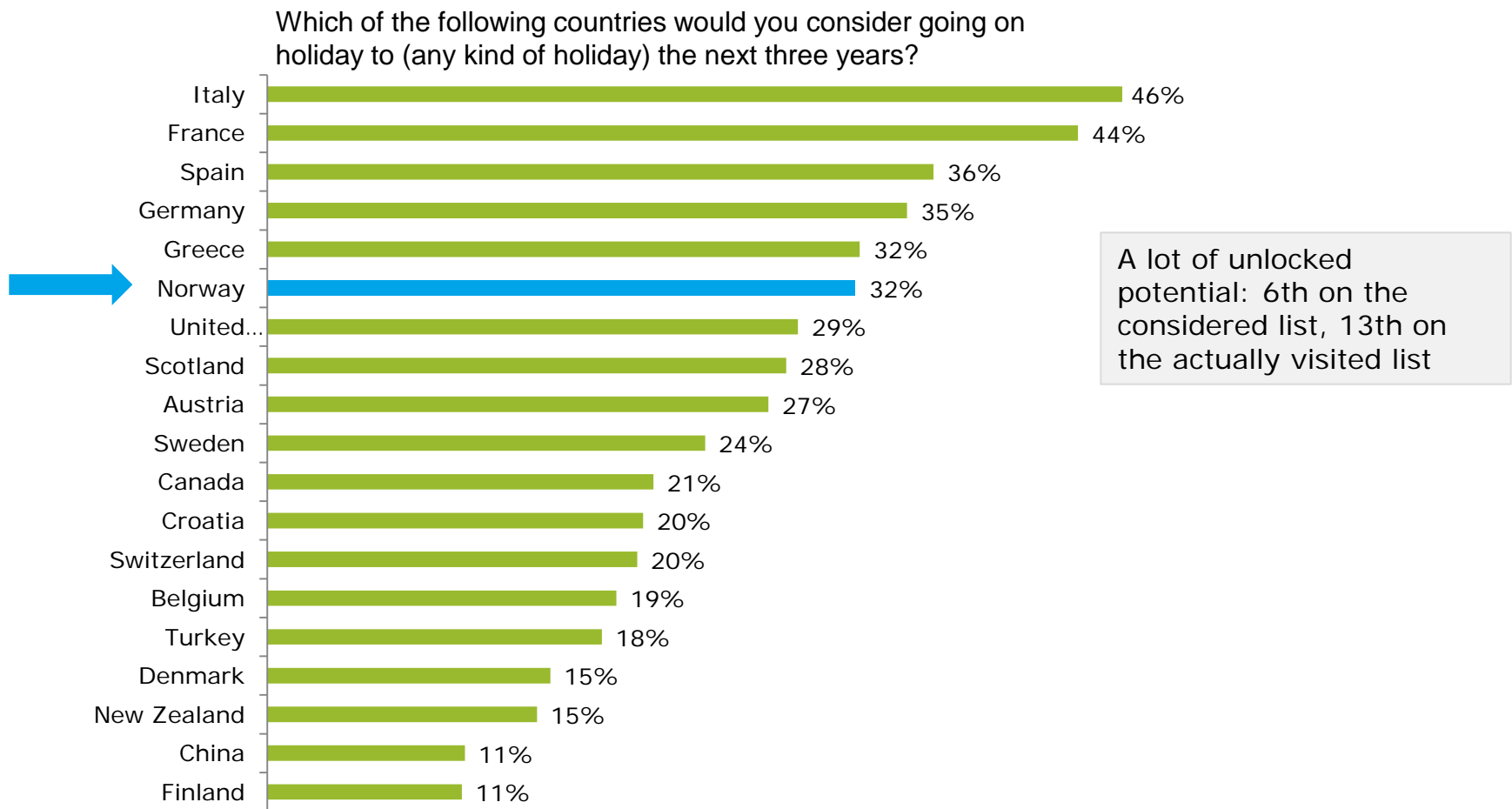
24% of The Dutch have ever visited Norway, which is on a par with Sweden but lower than Denmark



n = all respondents aware of the country in the quantitative sample

Considered destinations in Holland

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



Dutch perception of Norway as a holiday destination

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

DESTINATION FEATURES

(functional)

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

ACTIVITIES

(functional)

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

EMOTIONAL BENEFITS

(emotional)

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

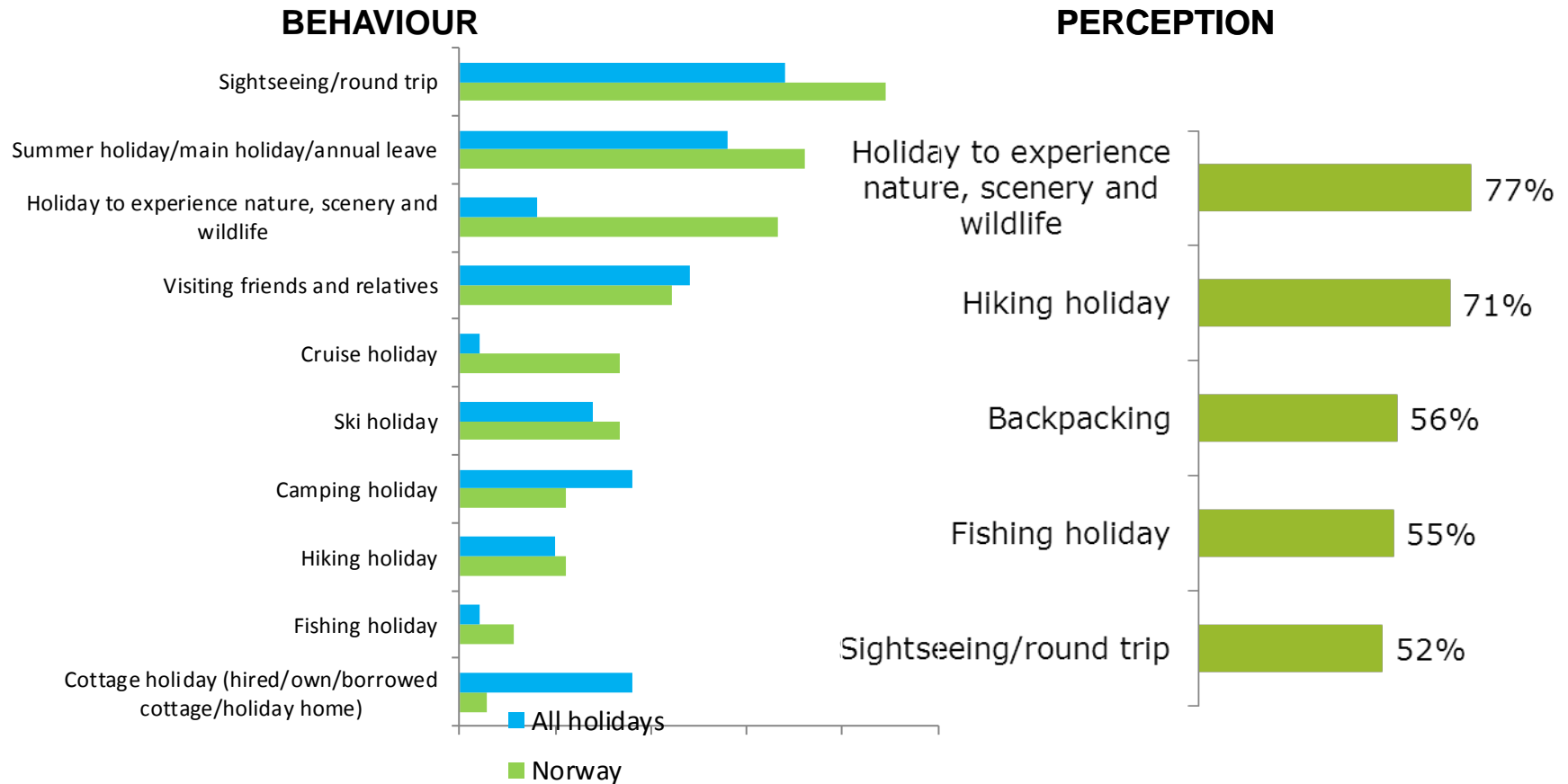
PERSONALITY

(emotional)

- Adventurous
- Active
- Peaceful
- Soothing
- Fresh

Travel behavior vs. perception of Norway

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



Norway N= 72 – Warning: Low sample size for trips to Norway

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

Norway delivers pretty well on the emotional level

What Dutch tourists want in general:

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

Emotional Benefits (for the tourist)

Norway delivers well

Helps me to escape from my hectic daily life



Allows me to discover new and interesting places



Norway does not deliver very well

Allows me to share good times with others



Helps me live life to the fullest



Gives me rich experiences



Personality (for Norway)

Relaxed



Friendly



Active



Soothing



Peaceful



Norway does not deliver on the functional level

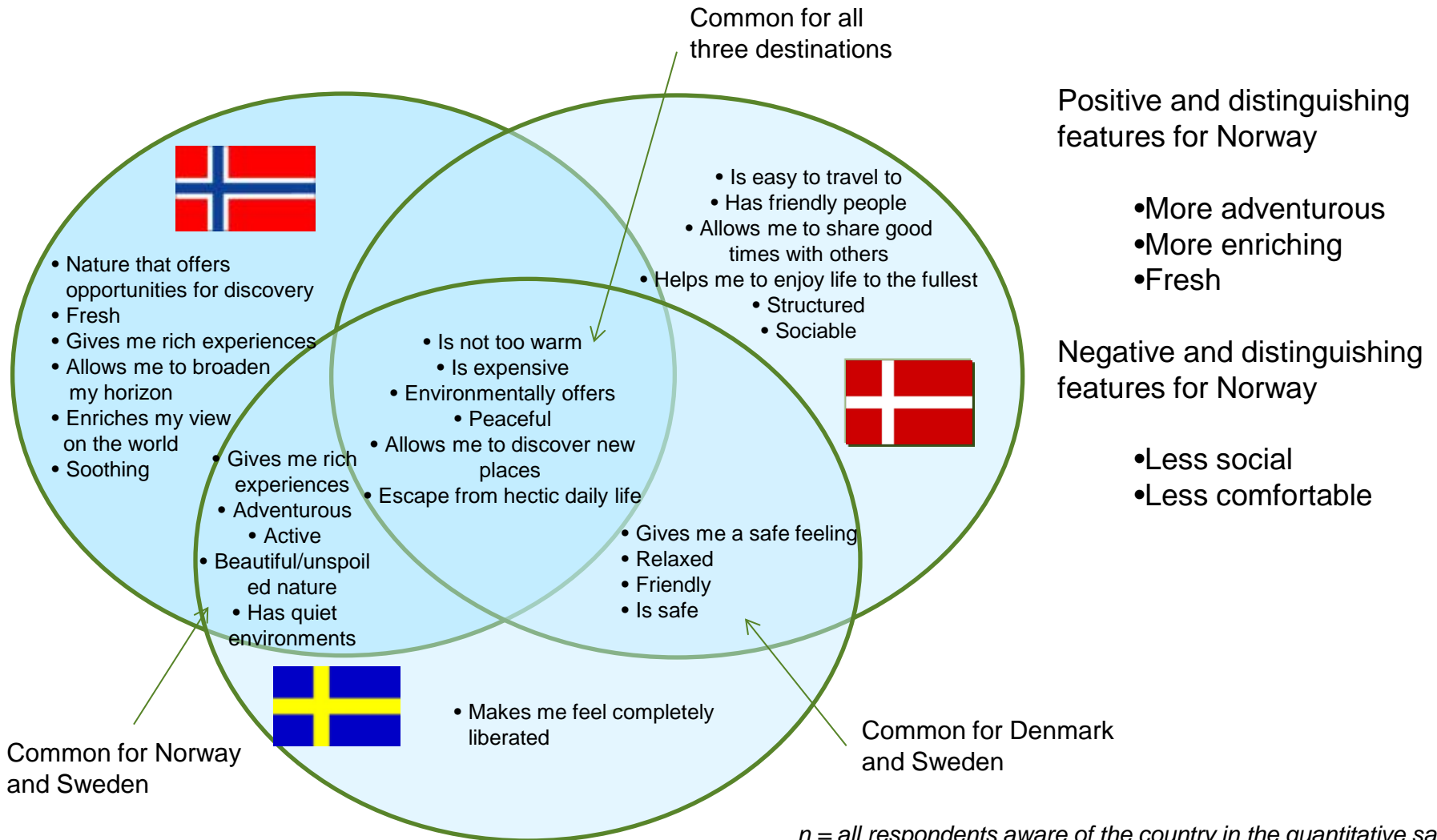
What Dutch tourists want in general:

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

Product characteristics (for Norway)			
Has beautiful nature	→	😊	Norway delivers well
Is easy to travel to	→	✗	Norway does not deliver very well
Has interesting sights	→	✗	
Has friendly people	→	✗	
Is safe	→	✗	

Activities (in Norway)		
Relaxation	→	✗
Attend sightseeing tours	→	✗
Observe the beauty of nature	→	😊
Visit restaurants	→	✗
Taste local food and drink	→	✗

Competitor analysis - Comparison between Norway, Denmark and Sweden





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Conclusions

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How do Norway meet generic expectations for holidays?



Norway mostly meet these expectations, except the social element

Meet the expectations people have for all types of holidays

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

Areas for improvement to meet hygiene expectations



A comfortable experience

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



A social experience

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



Good food, drink and culture

- Talk about local food & drink traditions
- But also talk about good international cuisine (for the less adventurous)
- Interesting sights and local culture

Active explorers:

- Fishing
- Hiking
- Active summer

Motivation for going on holidays:

Exploration and liberation

Activities:

- Activities in nature
- Hiking
- Experience the beauty of nature
- Taste local food and drink
- Go on sightseeing tours
- Experience natural phenomenon
- Fishing



The active explorer in a nutshell

About 4% of the Dutch population

Why they travel:

- Exploration, new energy and liberation

Sociodemographics:

- Overrepresented by 50+ and few under the age of 30
- Dominated by couples (but significantly more singles without children than the curious explorers)
- Overrepresented by males
- Higher education – almost twice as many with higher education than the average population
- Average gross household income is around 60,000 € (more with low income than the curious explorers)
- Almost two of three have kids, but more people without kids than the curious explorers

How they travel:

- Active holidays, hiking holidays, fishing holidays
- Spend less money than average
- Use less info sources than average both before and during the trip, but slightly more active on social media
- Slightly shorter planning horizon than other Dutch travellers, but still more than 50% plan their trip more than 3 months before departure
- Less likely to be influenced by partner than other travellers (even though 50% claim to be influenced by partner), and more likely to be influenced by friends (28%)
- 28% will stay in a medium standard hotel, and overall choose slightly cheaper accommodation than other travellers
- 76% will organise the trip themselves
- 65% will travel with partner, but more likely to travel with friends than average (27%) and less likely to travel with kids (19%)
- Less likely to travel by plane (25%). This corresponds to where they travel – more travel within Europe and less to far away destinations



Curious explorers

- Round trip by (car/bus)
- Northern Norway winter
- *Hurtigruten* coastal express



Motivation for going on holidays:
Mostly **exploration**

Activities:

- Experience the beauty of nature
- Taste local food and drink
- Go on sightseeing tours
- Discover local culture and lifestyles
- Experience natural phenomenon
- Shorter hikes and physical activities in nature (soft)
- Visit historical buildings

The curious explorer in a nutshell

About 11% of the Dutch population

Why they travel:

- Predominantly for exploration

Sociodemographics:

- Overrepresented by 50+ and few under the age of 30
- Dominated by couples
- Overrepresented by males
- Higher education - almost twice as many with higher education than the average population
- Average gross household income is around 60,000 €
- 75% have kids living in the household

How they travel:

- Sightseeing, round trips, holiday to experience nature, camping
- Norway as the seventh most popular destination
- Spend more than average and willing to pay for unique experiences
- Use more info sources than average both before and during the trip
- Slightly shorter planning horizon than other Dutch travellers, but still more than 50% plan their trip more than 3 months before departure
- Less likely to be influenced by partner than other travellers (even though 50% claim to be influenced by partner), and more likely to be influenced by friends (28%)
- Overrepresented for both hotel (58%) and camping (40%)
- 68% will organise the trip themselves, but much more likely to travel on an organised trip than other types of holidays (20%)
- 76% will travel with partner, and less likely to travel with friends than average (13%) and less likely to travel with kids (26%)
- More likely to travel by plane (38%) and caravan/camper van (13%)