Optima 2012
Total report - The Russian market 17.10.12

Basic motivations for going on holiday
Needs based segmentation - Censydiam

Developed for: Innovation Norway
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Executive summary - Background

- Over the years, Innovation Norway has conducted several Optima studies across different markets. The main objective of these studies is to get a better understanding of Norway’s key markets.
- This study is conducted using Censydiam, Ipsos research tool for motivational research.
- The approach identifies the underlying physiological needs consumers seek to satisfy when travelling abroad on holiday.
- The purpose of the research:
  - TO IDENTIFY THE BEST MEANS OF STRENGTHENING THE FUTURE OF THE VISIT NORWAY BRAND AND NORWAY AS A TOURIST DESTINATION
  - TO UNDERSTAND THE COMPETITIVE LANDSCAPE AND TARGET NEEDS TO PROMOTE INNOVATION AND COMMUNICATION
- The research was conducted in Germany, Russia (Moscow and St. Petersburg) and the Netherlands in 2011/2012.
- We have conducted four focus groups and 1,200 web interviews in each country with respondents that have been on holiday abroad during the last two years.
Executive summary - Main findings

- Fundamental meaning of going on holiday
  - In the quantitative study, we found that there are some common denominators across all types of holiday and across all segments:
  - Holidays abroad must always help people to escape from their daily lives!
  - The core of all holidays is about escapism, discovering new and interesting places and being together. All holidays must fulfil these criteria regardless of the type of holiday.

- The segments
  - The research has identified eight motivational segments; Liberation, Sharing Good Times, Togetherness, Harmony, Routine, Broadening your Horizon, Luxury and Exploration.

- Norway is best positioned in two motivational segments:
  - Exploration:
    - Emotional benefits sought by the tourist: Gives me rich experiences, Discover new and interesting places, Escape from my hectic daily life and Enrich my view of the world
    - Personality of the destinations: Adventurous, Explorative, Unique, Active and Friendly
  - Broadening your Horizon:
    - Emotional benefits sought by the tourist: Discover new and interesting places, Broaden my horizon, Broaden my knowledge, Enrich my view of the world and Rich experiences
    - Personality of the destinations: Friendly, Authentic, Open-minded, Relaxed and Cultivated
Executive summary - Main findings

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

- 12% of the Russians in the sample have visited Norway, which is lower than for Sweden and Denmark. Finland is the strongest competitor.

- However Norway is the most frequently considered Scandinavian holiday destination in Russia. This demonstrates that Norway has unrealised potential.

- 23% of the Germans in the sample are considering going on holiday to Norway in the next three years.
Executive summary – Conclusions

- Despite a slightly differentiated position compared to competing destinations, Norway is not relevant enough to attract a lot of (repeat) visitors
  - The proportion of people who have ever visited Norway is low compared to other destinations
  - Repeat visiting is also lower than average

- Norway does not clearly 'own' any motivational segment

- However, the current Visit Norway Strategy is broadly on target:
  - Across all markets, Norway is often associated with Exploration and Broadening your Horizon.
  - But the strength of this association is relatively weak

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

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

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

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

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

   **BUILD ON**
   - Active
   - Makes me feel liberated
   - Makes me stand out from the crowd
   - Nature activities (other than skiing)
   - Unspoiled nature
1a. Introduction

Background and who we spoke to in the research
The purpose of the research:

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

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

In order to do so, this research provides answers to the two questions:

- What is the ideal holiday?
- How are destinations (brands) positioned?
Evaluate / Confirm current direction for Norway

Cross-country

Germany ✔️ Russia* The Netherlands

Choose target for each holiday type

Skiing Sightseeing/roundtrip City trip/city break
Camping Experience nature Cottage
Active holiday

* Moscow and St. Petersburg
What have we done ....

We have created qualitative hypothesis
four focus groups in each country

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

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

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

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

**Gender**
- Female: 57%
- Male: 43%

Total population: Females 52%, males 48%

**Income**
(No income statistics on population available)

- 100,000 Euro’s per year or more: 3%
- 90,000 – 99,999 Euro per year: 1%
- 80,000 – 89,999 Euro per year: 2%
- 70,000 – 79,999 Euro per year: 1%
- 60,000 – 69,999 Euro per year: 2%
- 50,000 – 59,999 Euro per year: 3%
- 40,000 – 49,999 Euro per year: 7%
- 30,000 – 39,999 Euro per year: 11%
- 20,000 – 29,999 Euro per year: 29%
- 10,000 – 19,999 Euro per year: 31%
- < 9,999 Euro per year: 5%

**Age**
- 18-24: 13%
- 25-29: 13%
- 30-39: 22%
- 40-49: 22%
- 50-59: 21%
- 60-65: 9%

**Region**
- Moscow: 70%
- St. Petersburg: 30%

- Ipsos MMI
1b. Introduction

Basic motivations for going on holiday
The same person, but different situations and different motivations

As consumers, we often have different needs depending on the situation. This also applies to holidays. A weekend getaway with a partner has to fulfil different needs than a skiing weekend with friends. This report is, therefore, based on different occasions – by occasion we mean different holidays.
To get inside the consumer’s mind, we need to go deeper. 20% Conscious

80% Sub-conscious

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

This is why we have chosen the Censydiam model for this project.
Having a compass or a map helps us to navigate the land of motivations.

The research helps us to do this...
The Censydiam model
We have identified eight motivational segments. They represent the different basic motivations for why people go on holidays.
On this side of the axis, we have people who approach the ideal holiday abroad in an open manner. They want to enjoy and explore the new world. They surrender to the new surroundings and enjoy them to the fullest. Within this new world, behaviour is more impulsive.

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

The Censydiam model has two main dimensions; the personal and the social.
- The vertical axis is the personal dimension.
The horizontal axis is the second dimension: *The social dimension*

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

On the other side of the axis, we have people who are more socially involved when escaping into a new world. They try to shape the new world in a relaxed manner. It is a more passive escape in which being together, being sociable and atmosphere are most relevant. Mental relaxation is extremely important.
1c. Introduction

How these needs and motivations can be identified?
People travel abroad because the holiday or destination in some sense serves certain needs. These needs may be fundamentally physiological (e.g. a place to sleep = hotel).

But when several options can satisfy the same need, a role for branding arises. People use holidays to satisfy more psychological needs and people choose types of holidays to reflect their personality, convey who they are to others, fulfil a deeper meaning in life, reinforce their own self-concept etc.

Hence, psychological needs play an important role in consumers’ decision-making and influence consumer behaviour.

In this context, a brand will succeed if it addresses a psychological need better than other brands.

Hence, stakeholders in the tourism industry need to examine their branding.

- What fundamental psychological need should we target?
- How can we differentiate our brands (products/services) from our competitors’?
Definition of emotional benefits
- What are people looking for? What psychological needs do people have?

- An emotional benefit is often a complex, positive, cognitive statement that our respondents are able to make about themselves due to their use of and attachment to our brand and its features.

- To be more exact, an emotional benefit is nothing more than 'something nice I can say about myself because I use your product or service.'

- The critical differences between emotions and emotional benefits are:
  - Emotional benefits are entirely cognitive, whereas emotions include a state of physiological arousal.
  - Emotional benefits are specifically attached to brands, their particular features and marketing applications. In contrast, emotions are more diffuse human physiological reactions with a limited set of simple labels.
  - Emotional benefits relate directly and powerfully to enduring self-concept, while emotions are more closely associated with temporary and instinctual physiological reactions.

- This last distinction is most important, and it most closely identifies the reason that emotional benefits are so vital to branding.

- In this study, we have a list of 31 emotional benefits that are tested quantitatively.

A holiday to Norway allows me to discover new and interesting places
A holiday to Norway helps me to escape from my hectic life
A holiday to Norway allows me to share good times with others
People don’t buy products – they want to satisfy certain needs. We need to shift the focus from products to the tourists (by putting people first).

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

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

Instead of product focus...

...focus on motivational benefit

...or personality

'Rorbuferie'/ holiday in a fisherman’s cabin

Share good times with others

Active, explorative and adventurous

This report will give you an insight into the basic psychological needs that you as a stakeholder in the tourism industry need to know about in order to optimise your communication and product development.
We need to understand 'who is doing what, when and where' in the holiday market by answering the question 'why'.

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

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

Want to learn more about the model and watch an instruction video, please visit our website at: http://w3.ipsos.com/marketing/censydiam/
Actual holidays, ideal holidays and perception of different holiday destinations

We ask the respondents to:

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

By doing this, we can understand:

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

*People have different needs depending on the situation. This report is therefore based on **different occasions**, rather than different individuals. – by occasion we mean **different holidays**
The ideal holiday can be explained by four different factors:

1. **Personality of the destination**
   - Active
   - Authentic

2. **Emotional benefits sought**
   - Escape from hectic daily life
   - Share good times with others
   - Discover new and interesting places

3. **A set of activities**
   - Skiing
   - Visit museums
   - Observe nature
   - Saltwater fishing

4. **Destination features**
   - Friendly people
   - Interesting sights
   - Beautiful nature
Explanation of the four factors of an ideal holiday

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

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

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

- **Set of activities (functional)**
  - Examples: Fishing, skiing, hiking

- **Destination features (functional)**
  - Qualities and characteristics of a destination
  - Examples: Has friendly people, has beautiful nature
Using the ideal holiday to understand basic needs for going on holiday

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

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

The segments in this report are defined by statistically grouping (clustering) the **emotional benefits sought** and the **personality** of the **ideal holiday** on a given occasion.
2. Fundamental meaning of going on holiday
We start with cultural context because it is vital for understanding and communicating with the German market

- Culture is all aspects of life, the totality of views, ideas and beliefs shared by individuals within a group of people. Culture is learned, it includes language, values, norms and customs.

- Understanding cultural context helps us to develop products and communication that is better targeted to the local market.

- As you will see from the report, the basic task of holidays is to 'help you escape from your daily life!'

- You therefore need to know a little bit about German culture to understand how this can be done.

- Consumers respond to values that are culturally ingrained and have a fundamental personal meaning for them as human beings. An understanding of the cultural context in the market therefore enables you to better understand the basic needs they seek to satisfy (i.e. the motivational segments in this report).

Source: Qualitative focus groups
General understanding of The Russian culture

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

- The “iron-curtain” made travelling abroad extremely limited and almost impossible for quite a long time
  - The fall of the “iron curtain” AND exposure of Russians to the world dramatically influenced their overall way of living. This brought a variety of opportunities both for business and holiday spending & planning
  - The “all-the-world-is-open-for-me” feeling resulted in “thirst for travelling, exploring and new impressions”

- After 2000s – the constant growth of living standards was interrupted by the financial break-down of 2008. Today we start feeling that our financial security is gradually restoring
  - This shifts the perception of holidays abroad FROM “nice-to-have / not essential” TO “must have”

- Rapid development of Internet, “share-experiences” websites and social networking
  - This delivers wider opportunities for prompt information “get and share”, consequently simplifying the process of holidays planning & decision-making
General understanding of The Russian culture

- Society values have shifted towards financial achievements, carrier-making, wealth etc., there is a new trend of starting a family at an older age – after having achieved key financial & personal-success goals.
  - travelling, number of countries visited became one of the key success indicators.

- Hectic life-style, tough struggle for work-and-life balance, prevalence of office workers with strict, tough but monotonous life schedule.
  - quality rest became a must for “go-on working”

- Health concerns are growing – gradual understanding of healthy life-style importance and desire to smoothly incorporate it’s elements into regular routines.
  - Holidays are an integral part of health restore.

- Not everybody speaks English fluently.
  - Low level of self-orientation in alien places.

From qualitative
General perspective of the role of holidays in the Russian culture

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

Currently Russians are striving to catch-up with the rest of the world and feel themselves integrated world’s citizens. They are eager to develop a more holistic & structural approach to holiday planning:

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

- the “culture” of planning and arranging is still under development – Many respondents find it hard to book a trip preliminary (tickets, hotels) – thus, spontaneous trips are not yet frequent enough

- visa application conditions are one of the key influences for trips abroad -> just a limited circle of people have long-term visas (which makes it possible for them to travel freely whenever they want to)

- “iron curtain” has fallen in state policy, but it has left a strong trace in people’s attitudes and perceptions:

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

Holidays abroad

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

Domestic holidays

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

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

The core of all holidays is about:

- Escapism
- New and interesting places
- Being together

All holidays must fulfil these criteria irrespective of the type of holiday

In Russia it’s also about learning

Source: Qualitative focus groups and quantitative survey
What Russian tourists want in general when they go on holiday
Irrespective of segments or types of holiday, there are some factors that are on the top of Russian tourists’ expectation lists for their ideal holiday

**PERSONALITY**
- Friendly
- Cozy
- Harmonious
- Outgoing
- Authentic

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

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

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

n = all holidays profiled in the quantitative sample.
The slide shows the most important factors
What Russian tourists want in general when they go on holiday
Irrespective of segments or types of holiday, there are some factors that are on the top of Russian tourists’ expectation lists for their ideal holiday

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

**TRAVEL TO DESTINATION**
- Scheduled plane (32%)
  - Car (30%)
  - Bus (25%)
  - Charter plane (25%)

**WITH WHOM**
- Alone 10%
- Children 0-6 years 10%
- Children 7-14 years 12%
- Children 15 years and older 2%
- Spouse/partner 51%
- Other family/relatives 16%
- Friends 25%
- Other people 4%

**ORGANISATION**
- I/we travelled in a group with an organised tour 27%
- I/we had the trip organised by others and travelled independently 20%
- I/we organised the trip myself/ourselves and travelled independently 52%
- Don’t know 1%
What information sources Russian tourists use before traveling and during the trip

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

Before travelling:
- Internet in general: 36%
- Homepages for the destination: 44%
- Advice from friends / family: 37%
- Homepages for hotels/ other accommodations: 36%
- Reviews from other travelers online: 34%
- Homepages for attractions and sights: 28%
- Homepages of carriers, including airlines etc.: 26%
- Travel agent in homeland: 25%
- Guidebooks: 20%
- Booking sites such as Expedia and Lastminute: 17%
- Travel portals like Tripadvisor: 16%
- Catalogs or brochures: 15%
- Social media such as Facebook or blogs: 15%
- Newspapers or magazines: 11%
- None: 8%
- TV or radio: 8%
- Travel fairs: 6%

During travel:
- Internet in general: 36%
- Homepages for the destination: 44%
- Advice from friends / family: 37%
- Homepages for hotels/ other accommodations: 36%
- Reviews from other travelers online: 34%
- Homepages for attractions and sights: 28%
- Homepages of carriers, including airlines etc.: 26%
- Travel agent in homeland: 25%
- Guidebooks: 20%
- Booking sites such as Expedia and Lastminute: 17%
- Travel portals like Tripadvisor: 16%
- Catalogs or brochures: 15%
- Social media such as Facebook or blogs: 15%
- Newspapers or magazines: 11%
- None: 8%
- TV or radio: 8%
- Travel fairs: 6%

n = all holidays profiled in the quantitative sample.
3. The segments
All the holidays reported in the Russian sample

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

- **Exploration**: Chasing rich experiences - 9%
- **Liberation**: Freeing yourself completely of all daily stress - 12%
- **Sharing Good Times**: Opening up to other people - 21%
- **Togetherness**: Strengthening family ties - 17%
- **Harmony**: Pampering yourself - 7%
- **Routine**: Safe choice; avoid surprises - 6%
- **Luxury**: Treating yourself to exclusive luxury - 2%
- **Becoming more knowledgeable**: Becoming more knowledgeable - 25%

*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 on all holidays.

n = all holidays profiled in the quantitative sample.
REGIONAL DIFFERENCES
Segment share - All destinations – all types of holiday

- Total all markets
- Total Russia
- Moscow
- St. Petersburg

- Liberation
- Sharing Good Times
- Togetherness
- Harmony
- Routine
- Broadening your horizon
- Luxury
- Exploration
Summary of the segments

- **Liberation**
  - Emotional benefits:
    - Enjoy life to the fullest
    - Feel full of energy
    - Feel completely liberated
    - Escape from my hectic daily life
    - Come to my senses
  - Personality:
    - Active
    - Relaxed
    - Friendly
    - Fresh
    - Soothing

- **Exploration**
  - Personality:
    - Adventurous
    - Explorative
    - Unique
    - Active
    - Friendly

- **Luxury**
  - Emotional benefits:
    - Luxurious
    - Classy
    - Extravagant
    - Superior
    - Indulgent
  - Personality:
    - Indulge in a bit of luxury
    - Feel on top of the world
    - Show my superior lifestyle
    - Feel special
    - Shows that I am successful in life

- **Harmony**
  - Emotional benefits:
    - Relaxed
    - Friendly
    - Soothing
    - Cozy
    - Peaceful
  - Personality:
    - Cultivated
    - Contemporary
    - Caring
    - Friendly
    - Relaxed

- **Share Good Times**
  - Emotional benefits:
    - Share good times
    - Meet new people
    - Immerse myself in the local culture
    - Discover new and interesting places
    - Escape from my hectic daily life
  - Personality:
    - Sociable
    - Outgoing
    - Friendly
    - Relaxed
    - Cozy

- **Predictable**
  - Emotional benefits:
    - Avoid too many surprises
    - Keep everything under control
    - A safe feeling
    - Let go without restrictions
    - Escape from my hectic daily life
  - Personality:
    - Friendly
    - Authentic
    - Open-minded
    - Relaxed
    - Cultivated

- **Pampering**
  - Emotional benefits:
    - Pamper myself
    - Sense of being well cared for
    - A safe feeling
    - Let go without restrictions
    - Escape from my hectic daily life
  - Personality:
    - Friendly
    - Authentic
    - Open-minded
    - Relaxing
    - Cultivated
Summary of the segments

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

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

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

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

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

**Sharing Good Times**
- Has a variety of different restaurant offers
- Has beautiful nature
- Has good service
- Has interesting sights
- Has good shopping

**Get pampered**
- Taste local food and drink
- Visit historical buildings/sites
- Get pampered

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

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

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

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

**Is easy to travel to**
- Is safe
- Has friendly people
- Has good local cuisine
- Has good local cuisine
- Is easy to travel to
4. Assessment of Norway
Where do Russians go?
Regional differences but Norway fails to attract a lot of Russian visitors...

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

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

Sweden has also a stronghold in St. Petersburg.

Norway also holds its strongest position in St. Petersburg.

Penetration = ever visited

n = all respondents aware of the country in the quantitative sample
Norway as a tourist destination – Across the three countries

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

Repeat visits (twice or more...)

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Germany</th>
<th>Netherlands</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>71%</td>
<td>63%</td>
<td>85%</td>
<td>37%</td>
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<tr>
<td>Spain</td>
<td>71%</td>
<td>82%</td>
<td>73%</td>
<td>37%</td>
</tr>
<tr>
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<td>64%</td>
<td>75%</td>
<td>65%</td>
<td>34%</td>
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<tr>
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<tr>
<td>Turkey</td>
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<td>59%</td>
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<tr>
<td>Greece</td>
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<td>54%</td>
<td>56%</td>
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<tr>
<td>Germany</td>
<td>82%</td>
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<td>47%</td>
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<tr>
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<tr>
<td>Belgium</td>
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<td>Norway</td>
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<tr>
<td>Egypt</td>
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<tr>
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<td>Canada</td>
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<td>China</td>
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<tr>
<td>Georgia</td>
<td>48%</td>
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<td></td>
<td></td>
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<tr>
<td>New Zealand</td>
<td>31%</td>
<td>35%</td>
<td>22%</td>
<td>46%</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>48%</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Average across all holidays in the three countries: 53%
# Regional differences in repeat visitors

<table>
<thead>
<tr>
<th>Repeat visitors = 2 times or more</th>
<th>Total Russia</th>
<th>Moscow</th>
<th>St. Petersburg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ukraine</td>
<td>87 %</td>
<td>88 %</td>
<td>86 %</td>
</tr>
<tr>
<td>Finland</td>
<td>70 %</td>
<td>30 %</td>
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<td>Turkey</td>
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<td>Egypt</td>
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<td>66 %</td>
<td>48 %</td>
</tr>
<tr>
<td>United States</td>
<td>48 %</td>
<td>46 %</td>
<td>52 %</td>
</tr>
<tr>
<td>Georgia</td>
<td>48 %</td>
<td>49 %</td>
<td>46 %</td>
</tr>
<tr>
<td>Germany</td>
<td>47 %</td>
<td>45 %</td>
<td>50 %</td>
</tr>
<tr>
<td>New Zealand</td>
<td>46 %</td>
<td>64 %</td>
<td>0 %</td>
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<tr>
<td>Kazakhstan</td>
<td>43 %</td>
<td>38 %</td>
<td>52 %</td>
</tr>
<tr>
<td>France</td>
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<td>37 %</td>
<td>38 %</td>
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<tr>
<td>Scotland</td>
<td>37 %</td>
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<tr>
<td>Spain</td>
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<td>42 %</td>
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<td>Sweden</td>
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<tr>
<td>Canada</td>
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<td>41 %</td>
<td>24 %</td>
</tr>
<tr>
<td>Netherlands</td>
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</tr>
<tr>
<td>China</td>
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<td>30 %</td>
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<tr>
<td>Greece</td>
<td>32 %</td>
<td>32 %</td>
<td>33 %</td>
</tr>
<tr>
<td>Switzerland</td>
<td>28 %</td>
<td>29 %</td>
<td>26 %</td>
</tr>
<tr>
<td>Denmark</td>
<td>28 %</td>
<td>30 %</td>
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<tr>
<td>Austria</td>
<td>27 %</td>
<td>26 %</td>
<td>29 %</td>
</tr>
<tr>
<td>Norway</td>
<td>25 %</td>
<td>20 %</td>
<td>29 %</td>
</tr>
<tr>
<td>Croatia</td>
<td>20 %</td>
<td>24 %</td>
<td>10 %</td>
</tr>
</tbody>
</table>

The repeat rates prove Finland's dominant position in St. Petersburg.
Norway is on the Russian consideration list

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

![Graph showing considered destinations]

- **Italia**: 47%
- **Spain**: 47%
- **France**: 38%
- **Greece**: 39%
- **Finland**: 38%
- **Germany**: 31%
- **Croatia**: 33%
- **Egypt**: 25%
- **Turkey**: 22%
- **Norway**: 23%
- **Austria**: 19%
- **China**: 19%
- **Ukraine**: 19%
- **Sweden**: 18%
- **United States**: 18%
- **Switzerland**: 16%
- **Netherlands**: 16%
- **Denmark**: 15%

A lot of unlocked potential: 10th on the considered list, 16th on the actually visited list.
Norway is the best rated Scandinavian destination in Russia

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

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

n = all respondents aware of the country
Norway is mostly associated with holidays to experience nature. In terms of actual behavior, sightseeing/roundtrip is the most important holiday type. Norway does not have such a strong association with ski.
Russian holidays to Norway + all holidays to any destination from Russia

The size* of each segment

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

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

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

Share of all holidays to any destination

Source: All holidays to any destination in the quantitative sample
SUMMARY OF SCORECARD FOR NORWAY:
Russians perception of Norway as a holiday destination

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

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

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

PERSONALITY
- Fresh
- Cultivated
- Explorative
- Peaceful
- Harmonious

WHAT are Norway perceived as?
Scorecard Norway, actual figures: Russians perception of Norway as a holiday destination

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

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

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

<table>
<thead>
<tr>
<th>Personality</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>(n=1131)</td>
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<td></td>
</tr>
<tr>
<td>Fresh</td>
<td>59,6</td>
<td>169</td>
</tr>
<tr>
<td>Cultivated</td>
<td>58,4</td>
<td>127</td>
</tr>
<tr>
<td>Explorative</td>
<td>56,4</td>
<td>137</td>
</tr>
<tr>
<td>Peaceful</td>
<td>54,8</td>
<td>138</td>
</tr>
<tr>
<td>Harmonious</td>
<td>54,6</td>
<td>120</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination features</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>(n=1131)</td>
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<tr>
<td>Has beautiful nature</td>
<td>84,5</td>
<td>124</td>
</tr>
<tr>
<td>Is not too warm</td>
<td>82,8</td>
<td>186</td>
</tr>
<tr>
<td>Has environment friendly offers</td>
<td>75,1</td>
<td>170</td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>72,4</td>
<td>209</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>72,2</td>
<td>146</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>(n=1131)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observe beauty of nature</td>
<td>80,5</td>
<td>124</td>
</tr>
<tr>
<td>Discover local culture and lifestyle</td>
<td>71,4</td>
<td>105</td>
</tr>
<tr>
<td>Discover local history and legends</td>
<td>69,9</td>
<td>103</td>
</tr>
<tr>
<td>Experience wildlife</td>
<td>69,8</td>
<td>167</td>
</tr>
<tr>
<td>Attend sightseeing tours</td>
<td>69,3</td>
<td>92</td>
</tr>
</tbody>
</table>
Comparison between Norway, Finland and Sweden

Common for Norway and Finland
- Has beautiful nature
- Peaceful
- Escape for hectic daily life
- Has environmentally friendly offers
- Has unspoiled nature
- Fresh
- Explorative
- Enriches my view on the world
- Is not too warm
- Has quiet environments
- Cultivated
- Harmonious
- Allows me to discover new places
- Allows me to broaden my horizon
- Has good service
- Has good medical care
- Contemporary
- Friendly
- Allows me to meet new people

Common for all three destinations
- Cozy
- Gives me a safe feeling
- Is easy to travel to
- Soothing
- Allows me to share good times with others

Common for Finland and Sweden
- Has good service
- Has good medical care
- Contemporary
- Friendly
- Allows me to meet new people
- Cultivated
- Harmonious
- Allows me to discover new places
- Allows me to broaden my horizon
- Has beautiful nature
- Peaceful
- Escape for hectic daily life
- Has unspoiled nature
- Fresh
- Explorative
- Enriches my view on the world
- Is not too warm
- Has quiet environments
- Cozy
- Gives me a safe feeling
- Is easy to travel to
- Soothing
- Allows me to share good times with others
Summery competitor analysis

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

- Negative and distinguishing features for Norway
  - Less social
  - Less comfortable
General perception of Norway

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

- Associations: The key association all relate to nature, not to any art or culture sightseeing:
  - Purity of nature – fiords, relict forests, cold and pure see, lakes
  - Hard to reach nature beauty
  - Cold and rainy climate

- Also connected with:
  - Fish and fishing
  - Winter-sports, like skis
  - Trolls and folk legends, Vikings:
    - “I was reading Norwegian tales when a school-boy and I liked these tale of trolleys so much. They are very reserved people, there are very few immigrants there this is way they managed to keep the genuine, old country spirit. And the country spirit is what I look for in a trip. For me this country is rather exotic (Male, 25-40)”

- Norway is associated with expensiveness of life and holiday-spending:
  - “Very high prices, not that affordable. You just understand this cannot be cheap in any way” (Male, 25-40)

- Not associated with
  - high-class comfort hotels with spa procedures
  - associated with family stay – audience is not aware it can be comfortable enough and interesting for kids
General perception of Norway

- **Brand image:**
  - **Identity:** Well-developed, socially secure and protected with high living standards Northern country not that opened to the world, keeping it’s traditions
  - **Personality:** reserved, calm, steady, strong, independent, genuine, charismatic, powerful, self-confident. Sort of restrained and detached

- **Culture – high living standards and social securities.**
- **However not associated with art or architecture masterpieces:**
  - “I think there are no museums there at all” (Male, 55-65)
  - “There is no Jazz music there” (Feale, 55-65)
- **No profound knowledge of culture, only a few celebrities mentioned:** Edward Grieg, Leifur Eriksson (mentioned by older audience)
- **Polarising opinions on national character traits:**
  - Part of audience consider Norwegians as very reserved, cold and non-emotional
  - Others assume – they are open-hearted and hospitable
Norway: The holiday experience

- **Holiday knowledge:**
  - General knowledge – quite limited, very generic. Iconic sights known – North Cape, aurora. Younger audience also mentions ancient railway.
  - What to do: visit fiords, go through the country by car or railroad, rafting, mountain skis, fishing, bicycling, eco-tourism, rent a cottage in wild nature.
  - When to go: Mostly in summer and for a rather prolonged stay (around two weeks):
    - “There is no sense to go there for less than 2 weeks. I’d like to see how people live their in rural areas, what do they do in Norway in our century, what kind of manufacturers they have” (Male 55-65).

- **Holiday values:**
  - Currently more associated with calm, steady, meditating type of stay, solitude, total relaxation and escaping into piece of mind and sole.
  - However also can be mind-refreshing and purifying, invigorating, re-energizing and inspiring as giving really unique and bright impressions of nature sights.

- **General holiday interest:** polarizing, very aspirational for part of audience, completely not attractive for others.

- **Who is this destination for:** Core target for Norway – rather experienced, advanced and independent travellers, nature and sport/active holiday lovers.
  - Link to motivational strategies – mostly fit to active explorers and authenticity seekers. Potential fit to harmony seekers.
  - Link to recruitment – more relevant for 25-40 Male audience.
The role of nature and nature elements in Norway

- Nature creates a core in Norway perception and identity for Russians
  - audience values it’s richness, authenticity and well-preserved purity and Northern kind of beauty
  - Norwegian nature is more associated with strict beauty and elegant of flora – mountains, lakes, fascinating views and fauna – mostly sea one.
  - But not connected either to versatility of nature – bright colours, lots of species or to nature created/fine-tuned by people – city parks, zoos, park + architecture etc.

- However for majority Russians nature as such is not often enough to attract and make a visit to the country, especially if this is not that affordable:
  - Russia is very rich and versatile in terms of nature and nature sights though highly valued by Russians as such do not create enough fascination

- Norway in Russian eyes is all about nature and experiences they expect to find there is mostly connected with it:
  - On the one hand it creates as aspiration as Norway is associated with fascinated views, unusual colours
    - thus with calm, steady, harmonious state of mind and shifting the mood from hectic
    - city-life
  - On the other hand – it’s also associated with necessity to take physical efforts – it’s more about a rest for your soul and mind, but not for your body

- Moreover Norwegian nature is perceived as rather tough in terms of climate conditions and accessibility of major sights
The role of nature and nature elements in Norway

Key learning

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

<table>
<thead>
<tr>
<th>Triggers</th>
<th>Barriers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique, non mass-touristic experience</td>
<td>Lack of knowledge and information presented in a transparent and easy to get way</td>
</tr>
<tr>
<td>Dive into genuine nature in a country with high living standards and comforts</td>
<td>Expensiveness and high prices</td>
</tr>
<tr>
<td>Sense totally different environment – northern, reserved, strong and powerful</td>
<td>Cold, non steady weather</td>
</tr>
<tr>
<td>Eco-purity</td>
<td>Not enough comforts for kids</td>
</tr>
<tr>
<td>Fascinating nature views</td>
<td>Limited range of propositions freely found in the Internet</td>
</tr>
<tr>
<td>Contrasts – hot and cold, bright and pastel, tough and comfort in one place at a time</td>
<td>Not an active advertising policy and presence on travel sights</td>
</tr>
<tr>
<td>Visit as a part of Scandinavian tour, together with Sweden and Finland</td>
<td></td>
</tr>
</tbody>
</table>
What does new information about Norway do to people’s perception

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

Key learning

Although new information somewhat enhances Norway image in terms of higher comfort level and versatility it still lacks “human and culture” touch and role to be truly aspirational for Russians
5a. Key Conclusions and Recommendations - Across all three markets

RECAP GLOBAL CONCLUSIONS
Key Conclusions and Recommendations - Across all three markets

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

- Norway fails to attract a lot of visitors
  - The share of people that have ever visited Norway is low compared to other destinations.
  - Repeat visiting is also lower than average.

- Norway has a fragmented brand footprint and does not clearly 'own' any motivational segment.

- However, the current Visit Norway Strategy is broadly on target:
  - Across all markets, Norway is often associated with Exploration and Broadening your Horizon.
  - But the strength of this association is relatively weak.

*If Norway wants to attract more visitors, it will have to increase its relevance as a holiday destination*
Key Conclusions and Recommendations - Across all three markets

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

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

2. At the same time, the total range of products available must go beyond just that. By using specific products, Norway can also be relevant for Togetherness and Liberation
Key Conclusions and Recommendations - Across all three markets
How to strengthen the association with Exploration

1. Norway needs to strengthen its association with Exploration

Why?

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

1. Norway needs to **strengthen its association with Exploration**

**How?**

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

How to strengthen the association with Exploration

FROM ...
Passive enjoyment

TO ...
Active participation

Postcard beauty of nature

Participating in the beauty of nature
Key Conclusions and Recommendations - Across all three markets

How to strengthen the association with Exploration

FROM ... TO ...

A lonely experience

An experience with family/friends
Key Conclusions and Recommendations - Across all three markets
How to strengthen the association with Exploration

FROM ... An expensive experience

TO ... A priceless experience
Key Conclusions and Recommendations - Across all three markets
On a product level, we might have to address other segments as well

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

Why?

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

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

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

How?

• For each of these segments, Norway has something important to offer, something it can build on.
  • **Exploration**: engaging with nature, offers rich experiences
  • **Broadening your Horizon**: unique history, unique sites, authentic cities, culture…
  • **Togetherness**: a peaceful place where people can come to their senses
  • **Liberation**: a place that allows you to completely escape from your hectic daily life, where you can feel completely free and liberated

• Addressing these motivations through specific holiday types/products (e.g. Skiing, Sightseeing, Cruise, etc.) will be key to unlocking their potential.
5b. Key Conclusions and Recommendations - Russia
Key conclusions

**MEET GENERIC HOLIDAY EXPECTATIONS**

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

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

**A social experience**
- Communicate lively towns & villages
  - ‘Populate’ the isolated scenes
  - Tackle language barrier by group travel

**Good food & drinks**
- Talk about local food & drink traditions
- But also talk about good international cuisine (for the less adventurous)
- Communicate tax free on arrival
Key Conclusions and Recommendations – Russia

Reach minimum level of generic expectations

What Russian tourists want in general:

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

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

**Emotional Benefits (for the tourist):**
- Norway delivers well
- Norway does not deliver very well
- Norway delivers pretty well on the emotional level...

**Personality (for Norway):**
- Friendly
- Cozy
- Harmonious
- Outgoing
- Authentic

...but not on personality
What Russian tourists want in general:

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

Product characteristics (for Norway):

- Norway does not deliver very well
- Norway delivers well

Activities (in Norway):

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

Key Conclusions and Recommendations – Russia
Reach minimum level of generic expectations
Key conclusions

TARGET EXPLORATION & BROADENING YOUR HORIZON DURING SIGHTSEEING/ROUNDTRIPS

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

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

INCREASE CULTURE HERITAGE IN COMMUNICATION

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

- Historic cities
- Arts, museums
- Local tradition
- Local music scene
- Local myths
- History
**Key conclusions**

**SIMPLIFY TRAVEL PLANNING**

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

**FROM**

Long distance trips with a lot of repetition

**TO**

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

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

• Examples:
  • The nature, the force of it, the sea, the fjords, the Viking heritage, beggars in the streets in the richest country in the world
  • The Fjord ferry trip in Oslo with fresh shrimps and white wine.
    • Feeding the seagulls on the ferry in the Nærøy fjord
Appendix
A) Segment score cards
B) Competing destinations – common ground analysis
C) Overall positioning & targeting – holiday types
A) Segment score cards
Liberation
**Segment core:**
- The basic motivation for going on holidays is to live life to the fullest. Makes me feel full of energy and completely liberated.
- It is active and fresh.

**Most important differentiators:**
- **Personality:**
  - Active
  - Fresh
  - Friendly
  - Outgoing
  - Cozy
- **Emotional benefits:**
  - Helps me to enjoy life to the fullest
  - Makes me feel completely liberated
  - Allows me to come to my senses
  - Makes me feel full of energy
- **Destination characteristics:**
  - Has beautiful nature
  - Has friendly people
  - Is safe
  - Has guaranteed sunshine

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

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

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

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

**Planning horizon:**
- 17% decided on the holiday 1-3 weeks before departure
- 15% decided on the holiday up to 1 month before departure
- 18% decided on the holiday up to 2 months before departure
- 15% decided on the holiday up to 3 months before departure
- 18% decided on the holiday 4-6 months before departure
Sharing Good Times

Description
Sharing Good Times
- Sociable, outgoing and friendly

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

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

Activities:
• Attend sightseeing tours
• Taste local food and drink
• Visit historical buildings/sites
• Observe beauty og nature
• Visit cities

Type of holiday:
• Visiting friends and relatives
• Sightseeing/round trip
• Sun and beach holiday
Sharing Good Times
- Sociable, outgoing and friendly

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

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

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

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

Description
TOGETHERNESS
- Peaceful, soothing, cozy, friendly and relaxed

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

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

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

Type of holiday:
• Visiting friends and relatives
• Sun and beach holiday
• Sightseeing/round trip
TOGETHERNESS
- Peaceful, soothing, cozy, friendly and relaxed

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

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

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

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

Description
Harmony
- Caring, cultivated, contemporary, friendly and generous

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

**Most important differentiators:**
- Personality:
  - Caring
  - Cultivated
  - Contemporary
  - Friendly
  - Generous
- Emotional benefits:
  - Gives me a safe feeling
  - Allows me to let go without restrictions
  - Give me a sense of being well cared for
  - Allows me to pamper myself
- Destination characteristics:
  - Is safe
  - Has interesting sights
  - Has good service
  - Has friendly people
  - Has good local cuisine

**Activities:**
- Visit restaurants
- Taste local food and drink
- Attend sightseeing tours
- Discover local history and legends
- Visit parks and gardens

**Type of holiday:**
- Visiting friends and relatives
- Sightseeing/round trip
- Sun and beach holiday
Harmony
- Caring, cultivated, contemporary, friendly and generous

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

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

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

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

Description
**Routine**
- **Predictable, practical and structured**

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

**Most important differentiators:**
- **Personality:**
  - Predictable
  - Structured
  - Practical
  - Friendly
  - Cozy
  - Cultivated
- **Emotional benefits:**
  - Avoids too many surprises
  - Allows me to keep everything under control
  - Gives me a safe feeling
- **Destination characteristics:**
  - Is safe
  - Has quiet environments
  - Has good service
  - Is easy to travel to
  - Has friendly people
  - Is not to warm

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

- **Type of holiday:**
  - Visiting friends and relatives
  - Sightseeing/roundtrip
  - Sun and beach holiday
  - City trip/city break
  - Ski holiday
Routine
- Predictable, practical and structured

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

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

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

Planning horizon:
• 18% decided on the holiday 1-3 weeks before departure
• 18% decided on the holiday up to 1 month before departure
• 24% decided on the holiday up to 2 months before departure
• 14% decided on the holiday up to 3 months before departure
• 11% decided on the holiday 4-6 months before departure
Broadening your Horizon

Description
Broadening your Horizon
- Authentic, friendly, open-minded, cultivated and explorative

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

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

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

**Type of holiday:**
- Sightseeing/roundtrip
- Visiting friends/relatives
- City trip/city break
**Broadening your Horizon**
- Authentic, friendly, open-minded, cultivated and explorative

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

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

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

**Planning horizon:**
- 16% decided on the holiday 1-3 weeks before departure
- 16% decided on the holiday up to 1 month before departure
- 25% decided on the holiday up to 2 months before departure
- 15% decided on the holiday up to 3 months before departure
- 17% decided on the holiday 4-6 months before departure
Luxury
- Luxurious, extravagant, superior and indulgent

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

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

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

**Type of holiday:**
- Visiting friends and relatives
- Ski holiday
- Sightseeing/round trip
- Sun and beach holiday
Luxury
- Luxurious, extravagant, superior and indulgent

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

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

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

**Planning horizon:**
- 11% decided on the holiday 1-3 weeks before departure
- 16% decided on the holiday up to 1 month before departure
- 32% decided on the holiday up to 2 months before departure
- 11% decided on the holiday up to 3 months before departure
- 11% decided on the holiday 4-6 months before departure
- 14% decided on the holiday 6-12 months before departure
**Exploration**
- Explorative, adventurous and unique

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

**Most important differentiators:**
- Personality:
  - Explorative
  - Adventurous
  - Unique
  - Daring
- Emotional benefits:
  - Gives me rich experiences
  - Enriches my view of the world
  - Allows me to discover new and interesting places
  - Helps me escape from my hectic daily life
  - Allows me to broaden my knowledge
- Destination characteristics:
  - Has interesting sights
  - Has good local cuisine
  - Has beautiful nature
  - Has a rich cultural heritage
  - Has friendly people

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

**Type of holiday:**
- Sightseeing/roundtrip
- Visiting friends and relatives
- City trip/city break
Exploration
- Explorative, adventurous and unique

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

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

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

**Planning horizon:**
- 15% decided on the holiday 1-3 weeks before departure
- 14% decided on the holiday up to 1 month before departure
- 27% decided on the holiday up to 2 months before departure
- 13% decided on the holiday up to 3 months before departure
- 16% decided on the holiday 4-6 months before departure
B) Competing destinations

Common ground analysis
How to read the scorecards

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

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

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

Items at the bottom of the list underlined = low rating, but high index
## Comparison Austria vs. Norway (Russian base)

### Destination features

| Unique to Norway | Has beautiful nature  
|                  | Has unspoiled nature  
|                  | Has nature that offers opportunities for discovery  
|                  | Allows me to live close to nature  
|                  | Allows me to have a unique experience  
| Common ground | Is not to warm  
|                | Has environmentally friendly offers  
|                | Has quiet environments  
|                | Is safe  
| Unique to Austria | Has a rich cultural heritage  
|                  | Has interesting culture and art  
|                  | Is easy to travel around  
|                  | Has classy restaurants  

### Activities

| Unique to Norway | Observe beauty of nature  
|                  | Experience wilderness  
|                  | Observe natural phenomenon (i.e. northern lights etc.)  
|                  | Experience wildlife  
| Common ground | Do winter activities (dog-sleigh, snowmobile etc.)  
|                | Experience mountains  
|                | Alpine skiing/snowboarding  
|                | Cross-country skiing  
| Unique to Austria | Hiking (less than two hours)  
|                  | Cycling  
|                  | Visit spa resorts  

### Emotional benefits

| Unique to Norway | Allows me to discover new and interesting places  
|                  | Helps me to escape from my hectic daily life  
|                  | Restores my sense of harmony and balance  
|                  | Allows me to come to my senses  
| Common ground | Gives me a safe feeling  
| Unique to Austria | Allows me to spoil my loved ones  
|                  | Gives me a sense of being well cared for  
|                  | Allows me to indulge myself in a bit of luxury  
|                  | Shows that I am successful in life  

### Personality

| Unique to Norway | Explorative  
|                  | Contemporary  
|                  | Unique  
|                  | Authentic  
|                  | Soothing  
| Common ground | Fresh  
|                | Cultivated  
|                | Harmonious  
|                | Peaceful  
| Unique to Austria | Cozy  
|                  | Luxurious  
|                  | Classy  

---
## Emotional benefits

<table>
<thead>
<tr>
<th>(n=50)</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows me to broaden my horizon</td>
<td>68,0</td>
<td>100</td>
</tr>
<tr>
<td>Allows me to broaden my knowledge</td>
<td>64,0</td>
<td>101</td>
</tr>
<tr>
<td>Gives me a safe feeling</td>
<td>62,0</td>
<td>134</td>
</tr>
<tr>
<td>Allows me to spoil my loved ones</td>
<td>56,0</td>
<td>114</td>
</tr>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>56,0</td>
<td>85</td>
</tr>
<tr>
<td>Makes me feel sophisticated</td>
<td>42,0</td>
<td>157</td>
</tr>
<tr>
<td>Shows that I am successful in life</td>
<td>44,0</td>
<td>154</td>
</tr>
<tr>
<td>Allows me to show my superior lifestyle</td>
<td>32,0</td>
<td>139</td>
</tr>
<tr>
<td>Makes me stand out from the crowd</td>
<td>32,0</td>
<td>131</td>
</tr>
</tbody>
</table>

## Personality

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

## Destination features

<table>
<thead>
<tr>
<th>(n=50)</th>
<th>%</th>
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</tr>
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<tbody>
<tr>
<td>Has attractive mountain areas</td>
<td>82,0</td>
<td>174</td>
</tr>
<tr>
<td>Has rich cultural heritage</td>
<td>82,0</td>
<td>125</td>
</tr>
<tr>
<td>Has interesting sights</td>
<td>76,0</td>
<td>104</td>
</tr>
<tr>
<td>Has interesting culture &amp; art</td>
<td>76,0</td>
<td>115</td>
</tr>
<tr>
<td>Has good service</td>
<td>76,0</td>
<td>122</td>
</tr>
<tr>
<td>Is an upper class destination</td>
<td>48,0</td>
<td>166</td>
</tr>
<tr>
<td>Is expensive</td>
<td>50,0</td>
<td>143</td>
</tr>
<tr>
<td>Is safe</td>
<td>72,0</td>
<td>138</td>
</tr>
<tr>
<td>Is not too warm</td>
<td>62,0</td>
<td>136</td>
</tr>
<tr>
<td>Has good medical care</td>
<td>60,0</td>
<td>130</td>
</tr>
<tr>
<td>Has classy restaurants</td>
<td>62,0</td>
<td>130</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>58,0</td>
<td>127</td>
</tr>
<tr>
<td>Allows me to be physical active</td>
<td>68,0</td>
<td>121</td>
</tr>
</tbody>
</table>

## Activity

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

### Destination features

| Unique to Norway | Has beautiful nature  
|                  | Has nature that offers opportunities for discovery  
|                  | Is well organized  
|                  | Has attractive mountain areas  
| Common ground    | Is not too warm  
|                  | Has environmentally friendly offers  
|                  | Has unspoiled nature  
|                  | Is safe  
|                  | Is not ruined by tourism  
| Unique to Canada | Has good opportunity to meet local people |

### Activities

| Unique to Norway | Observe beauty of nature  
|                  | Experience mountains  
|                  | Saltwater fishing  
| Common ground    | Experience wildlife  
|                  | Observe natural phenomenon (i.e. northern lights etc.)  
|                  | Experience wilderness  
|                  | Do winter activities (dog-sleigh, snowmobile etc.)  
|                  | Visit national parks  
|                  | Alpine skiing/snowboarding  
|                  | Cross-country skiing  
| Unique to Canada | None |

### Emotional benefits

| Unique to Norway | Allows me to discover new and interesting places  
|                  | Allows me to come to my senses  
|                  | Restores my sense of harmony and balance  
| Common ground    | Helps me to escape from my hectic daily life  
|                  | Gives me a safe feeling  
|                  | Makes me feel completely liberated  
| Unique to Canada | Allows me to broaden my knowledge  
|                  | Helps me meet new people |

### Personality

| Unique to Norway | Fresh  
|                  | Cultivated  
|                  | Explorative  
|                  | Peaceful  
|                  | Harmonious  
| Common ground    | Structured  
|                  | Caring  
| Unique to Canada | Practical  
|                  | Predictable  
|                  | Classy |
### Emotional benefits

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

### Destination features

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

### Personality

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

### Activity

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

### Destination features

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has beautiful nature</td>
<td>Is not too warm</td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>Has environmentally friendly offers</td>
</tr>
<tr>
<td>Has nature that offers opportunities for discovery</td>
<td>Has quiet environments</td>
</tr>
<tr>
<td>Allows me to be active</td>
<td>Is safe</td>
</tr>
</tbody>
</table>

### Activities

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observe beauty of nature</td>
<td>Experience wildlife</td>
<td>Attend sightseeing tours</td>
</tr>
<tr>
<td>Observe natural phenomenon (i.e. northern lights etc.)</td>
<td>Cross country skiing</td>
<td>Visit museums</td>
</tr>
<tr>
<td>Experience wilderness</td>
<td></td>
<td>Discover local history and legends</td>
</tr>
<tr>
<td>Hiking (more than two hours)</td>
<td></td>
<td>Experience architecture</td>
</tr>
<tr>
<td>Do winter activities (dog-sleigh, snowmobile etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Emotional benefits

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>Gives me a safe feeling</td>
</tr>
<tr>
<td>Helps me to escape from my hectic daily life</td>
<td>Avoids too many surprises</td>
</tr>
<tr>
<td>Restores my sense of harmony and balance</td>
<td></td>
</tr>
<tr>
<td>Allows me to come to my senses</td>
<td></td>
</tr>
<tr>
<td>Makes me feel completely liberated</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to Denmark</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gives me rich experiences</td>
<td></td>
</tr>
</tbody>
</table>

### Personality

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
<td>Cultivated</td>
<td>Friendly</td>
</tr>
<tr>
<td>Explorative</td>
<td>Peaceful</td>
<td>Cozy</td>
</tr>
<tr>
<td>Contemporary</td>
<td>Harmonious</td>
<td></td>
</tr>
<tr>
<td>Authentic</td>
<td>Unique</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Soothing</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to Denmark</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to Denmark</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>
# Scorecard – Denmark
## Russian base

## Emotional benefits

<table>
<thead>
<tr>
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<th>%</th>
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</tr>
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<tbody>
<tr>
<td>Gives me a safe feeling</td>
<td>62,8</td>
<td>157</td>
</tr>
<tr>
<td>Allows me to broaden my horizon</td>
<td>60,5</td>
<td>103</td>
</tr>
<tr>
<td>Helps me to meet new people</td>
<td>55,8</td>
<td>100</td>
</tr>
<tr>
<td>Allows me to broaden my knowledge</td>
<td>55,8</td>
<td>102</td>
</tr>
<tr>
<td>Enriches my view on the world</td>
<td>55,8</td>
<td>103</td>
</tr>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>55,8</td>
<td>98</td>
</tr>
<tr>
<td>Avoids too much surprises</td>
<td>39,5</td>
<td>142</td>
</tr>
<tr>
<td>Makes me feel special</td>
<td>32,6</td>
<td>129</td>
</tr>
</tbody>
</table>

## Personality

<table>
<thead>
<tr>
<th>(n=43)</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivated</td>
<td>62,8</td>
<td>166</td>
</tr>
<tr>
<td>Cozy</td>
<td>51,2</td>
<td>136</td>
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<tr>
<td>Friendly</td>
<td>51,2</td>
<td>120</td>
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<tr>
<td>Peaceful</td>
<td>46,5</td>
<td>142</td>
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<tr>
<td>Harmonious</td>
<td>41,9</td>
<td>113</td>
</tr>
<tr>
<td>Soothing</td>
<td>41,9</td>
<td>138</td>
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<tr>
<td>Contemporary</td>
<td>41,9</td>
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## Destination features

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Has interesting sights</td>
<td>79,1</td>
<td>132</td>
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<tr>
<td>Has good service</td>
<td>69,8</td>
<td>136</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>67,4</td>
<td>161</td>
</tr>
<tr>
<td>Has rich cultural heritage</td>
<td>65,1</td>
<td>121</td>
</tr>
<tr>
<td>Has a variety of accommodation offers</td>
<td>65,1</td>
<td>118</td>
</tr>
<tr>
<td>Is not too warm</td>
<td>60,5</td>
<td>161</td>
</tr>
<tr>
<td>Has classy restaurants</td>
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<td>142</td>
</tr>
<tr>
<td>Is safe</td>
<td>58,1</td>
<td>136</td>
</tr>
<tr>
<td>Is not for just anybody, is exclusive</td>
<td>23,3</td>
<td>132</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>46,5</td>
<td>125</td>
</tr>
<tr>
<td>Has good medical care</td>
<td>46,5</td>
<td>123</td>
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## Activity

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Attend sightseeing tours</td>
<td>72,1</td>
<td>119</td>
</tr>
<tr>
<td>Visit museums</td>
<td>69,8</td>
<td>135</td>
</tr>
<tr>
<td>Discover local history and legends</td>
<td>67,4</td>
<td>123</td>
</tr>
<tr>
<td>Taste local food and drink</td>
<td>65,1</td>
<td>111</td>
</tr>
<tr>
<td>Experience local architecture</td>
<td>65,1</td>
<td>122</td>
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<tr>
<td>Attend concerts/festivals</td>
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<td>150</td>
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<tr>
<td>Visit art exhibitions</td>
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<td>129</td>
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<tr>
<td>Bicycling</td>
<td>46,5</td>
<td>128</td>
</tr>
<tr>
<td>Attend theatre, ballet, opera performances</td>
<td>34,9</td>
<td>122</td>
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</table>
### Comparison Finland vs. Norway (Russian base)

#### Destination features

<table>
<thead>
<tr>
<th></th>
<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unique to Norway</strong></td>
<td>Allows me to have unique experiences</td>
<td>Has beautiful nature</td>
<td>Is easy to travel to</td>
</tr>
<tr>
<td></td>
<td>Is expensive</td>
<td>Is not too warm</td>
<td>Has good service</td>
</tr>
<tr>
<td></td>
<td>Has attractive mountain areas</td>
<td>Has environment friendly offers</td>
<td>Has good service</td>
</tr>
<tr>
<td></td>
<td>Allows me to have unique experiences</td>
<td>Has unspoiled nature</td>
<td>Has unspoiled nature</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has nature that offers opportunities for</td>
<td>Has nature that offers opportunities for</td>
</tr>
<tr>
<td></td>
<td></td>
<td>discovery</td>
<td>discovery</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Is safe</td>
<td>Is safe</td>
</tr>
<tr>
<td><strong>Common ground</strong></td>
<td>Has beautiful nature</td>
<td>Has environment friendly offers</td>
<td>Has unspoiled nature</td>
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<td>Is not too warm</td>
<td>Has unspoiled nature</td>
<td>Has nature that offers opportunities for</td>
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<tr>
<td></td>
<td>Has environment friendly offers</td>
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<tr>
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</tr>
<tr>
<td><strong>Unique to Finland</strong></td>
<td>Is easy to travel to</td>
<td>Has good service</td>
<td>Has good shopping</td>
</tr>
<tr>
<td></td>
<td>Has good service</td>
<td>Has good service</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has easy to travel around</td>
<td>Has good shopping</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has good shopping</td>
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#### Activities

<table>
<thead>
<tr>
<th></th>
<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unique to Norway</strong></td>
<td>Observe beauty of nature</td>
<td>Experience wildlife</td>
<td>Hiking (less than two hours)</td>
</tr>
<tr>
<td></td>
<td>Visit national parks</td>
<td>Experience the wilderness</td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Experience mountains</td>
<td>Do winter activities (dog-sleigh, snowmobile etc)</td>
<td>Hiking (more than two hours)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</td>
<td>Bicycling</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Relaxation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Visit the countryside</td>
</tr>
<tr>
<td><strong>Common ground</strong></td>
<td>Experience wildlife</td>
<td>Experience the wilderness</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Experience the wilderness</td>
<td>Do winter activities (dog-sleigh, snowmobile etc)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</td>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</td>
<td></td>
</tr>
<tr>
<td><strong>Unique to Finland</strong></td>
<td>Hiking (less than two hours)</td>
<td>Shopping</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hiking (more than two hours)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bicycling</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Relaxation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visit the countryside</td>
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#### Emotional benefits

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<tr>
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<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unique to Norway</strong></td>
<td>Allows me to discover new and interesting places</td>
<td>Helps me to escape from my hectic daily life</td>
<td>Allows me to share good times with others</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Helps me to escape from my hectic daily life</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Helps me to escape from my hectic daily life</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Restores my sense of balance</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allows me to come to my senses</td>
<td></td>
</tr>
<tr>
<td><strong>Common ground</strong></td>
<td>Helps me to escape from my hectic daily life</td>
<td>Gives me a safe feeling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Helps me to escape from my hectic daily life</td>
<td>Gives me a safe feeling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Helps me to escape from my hectic daily life</td>
<td>Restores my sense of balance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Helps me to escape from my hectic daily life</td>
<td>Allows me to come to my senses</td>
<td></td>
</tr>
<tr>
<td><strong>Unique to Finland</strong></td>
<td>Allows me to share good times with others</td>
<td></td>
<td></td>
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#### Personality

<table>
<thead>
<tr>
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<th>Unique to Norway</th>
<th>Common ground</th>
<th>Unique to Finland</th>
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</thead>
<tbody>
<tr>
<td><strong>Unique to Norway</strong></td>
<td>Explorative</td>
<td>Fresh</td>
<td>Cozy</td>
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<tr>
<td></td>
<td>Contemporary</td>
<td>Cultivated</td>
<td>Practical</td>
</tr>
<tr>
<td></td>
<td>Unique</td>
<td>Peaceful</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Authentic</td>
<td>Harmonious</td>
<td></td>
</tr>
<tr>
<td><strong>Common ground</strong></td>
<td>Fresh</td>
<td>Cultivated</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cultivated</td>
<td>Peaceful</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Peaceful</td>
<td>Harmonious</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Harmonious</td>
<td>Soothing</td>
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</tr>
<tr>
<td><strong>Unique to Finland</strong></td>
<td>Cozy</td>
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<td></td>
</tr>
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## Emotional Benefits

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<thead>
<tr>
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<tr>
<td>Gives me a safe feeling</td>
<td>67.7</td>
<td>164</td>
</tr>
<tr>
<td>Allows me to share good times with others</td>
<td>61.1</td>
<td>116</td>
</tr>
<tr>
<td>Allows me to broaden my horizon</td>
<td>60.1</td>
<td>99</td>
</tr>
<tr>
<td>Helps me to escape from my hectic daily life</td>
<td>59.5</td>
<td>131</td>
</tr>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>57.4</td>
<td>98</td>
</tr>
<tr>
<td>Avoids too much surprises</td>
<td>45.0</td>
<td>156</td>
</tr>
<tr>
<td>Allows me to keep everything under control</td>
<td>36.0</td>
<td>125</td>
</tr>
<tr>
<td>Restores my sense of harmony and balance</td>
<td>50.3</td>
<td>123</td>
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## Personality

<table>
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<tr>
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<tbody>
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<td>Peaceful</td>
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<td>174</td>
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<tr>
<td>Soothing</td>
<td>56.3</td>
<td>167</td>
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<tr>
<td>Cozy</td>
<td>55.8</td>
<td>133</td>
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<tr>
<td>Harmonious</td>
<td>53.4</td>
<td>129</td>
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<tr>
<td>Cultivated</td>
<td>51.3</td>
<td>122</td>
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<tr>
<td>Practical</td>
<td>49.2</td>
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<td>Predictable</td>
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<td>Structured</td>
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<tr>
<td>Relaxed</td>
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## Destination Features

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<tbody>
<tr>
<td>Is not too warm</td>
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<td>189</td>
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<tr>
<td>Is easy to travel to</td>
<td>82.8</td>
<td>173</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>78.6</td>
<td>160</td>
</tr>
<tr>
<td>Has beautiful nature</td>
<td>77.2</td>
<td>115</td>
</tr>
<tr>
<td>Is safe</td>
<td>76.7</td>
<td>153</td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>66.4</td>
<td>193</td>
</tr>
<tr>
<td>Is not too different from home</td>
<td>46.3</td>
<td>169</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>73.8</td>
<td>168</td>
</tr>
<tr>
<td>Allows me to live close to nature</td>
<td>72.8</td>
<td>166</td>
</tr>
<tr>
<td>Is not ruined by tourism</td>
<td>49.5</td>
<td>145</td>
</tr>
<tr>
<td>Has good shopping</td>
<td>65.6</td>
<td>139</td>
</tr>
<tr>
<td>Allows me to be physical active</td>
<td>70.6</td>
<td>131</td>
</tr>
<tr>
<td>Has good medical care</td>
<td>57.4</td>
<td>129</td>
</tr>
<tr>
<td>Is well organized</td>
<td>60.8</td>
<td>124</td>
</tr>
<tr>
<td>Is easy to travel around</td>
<td>65.9</td>
<td>121</td>
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</table>

## Activity

<table>
<thead>
<tr>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>Observe beauty of nature</td>
<td>69.6</td>
<td>110</td>
</tr>
<tr>
<td>Fresh water fishing</td>
<td>69.3</td>
<td>245</td>
</tr>
<tr>
<td>Hiking (less than two hours)</td>
<td>69.0</td>
<td>112</td>
</tr>
<tr>
<td>Do winter activities (dog-sleigh, snowmobile etc)</td>
<td>68.8</td>
<td>268</td>
</tr>
<tr>
<td>Shopping</td>
<td>65.3</td>
<td>133</td>
</tr>
<tr>
<td>Cross country skiing</td>
<td>56.6</td>
<td>254</td>
</tr>
<tr>
<td>Alpine skiing/snowboarding</td>
<td>55.3</td>
<td>170</td>
</tr>
<tr>
<td>Experience the wilderness</td>
<td>50.0</td>
<td>146</td>
</tr>
<tr>
<td>Kayaking/canoeing</td>
<td>33.9</td>
<td>144</td>
</tr>
<tr>
<td>Bicycling</td>
<td>63.0</td>
<td>143</td>
</tr>
<tr>
<td>Experience wildlife</td>
<td>56.1</td>
<td>137</td>
</tr>
<tr>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune)</td>
<td>45.5</td>
<td>129</td>
</tr>
<tr>
<td>Visit the countryside</td>
<td>61.1</td>
<td>123</td>
</tr>
<tr>
<td>Visit or take part in sports events</td>
<td>36.8</td>
<td>121</td>
</tr>
</tbody>
</table>
## Comparison New Zealand vs. Norway (Russian base)

### Destination features

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is safe</td>
<td>Has beautiful nature</td>
</tr>
<tr>
<td>Allows me to be physical active</td>
<td>Is not too warm</td>
</tr>
<tr>
<td>Has good medical care</td>
<td>Has environmentally friendly offers</td>
</tr>
<tr>
<td>Is well organized</td>
<td>Has unspoiled nature</td>
</tr>
<tr>
<td></td>
<td>Has quiet environments</td>
</tr>
<tr>
<td></td>
<td>Has nature that offers opportunities for discovery</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has romantic spots</td>
</tr>
</tbody>
</table>

### Activities

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do winter activities (dog-sleigh, snowmobile etc.)</td>
<td>Observe beauty of nature</td>
</tr>
<tr>
<td>Experience mountains</td>
<td>Experience the wildlife</td>
</tr>
<tr>
<td>Alpine skiing/snowboarding</td>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</td>
</tr>
<tr>
<td>Cross-country skiing</td>
<td>Experience the wilderness</td>
</tr>
<tr>
<td></td>
<td>Visit national parks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nothing</td>
</tr>
</tbody>
</table>

### Emotional benefits

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helps me to escape from my hectic daily life</td>
<td>Allows me to discover new and interesting places</td>
</tr>
<tr>
<td>Gives me a safe feeling</td>
<td>Restores my sense of harmony and balance</td>
</tr>
<tr>
<td></td>
<td>Allows me to come to my senses</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nothing</td>
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</table>

### Personality

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivated</td>
<td>Fresh</td>
</tr>
<tr>
<td>Harmonious</td>
<td>Explorative</td>
</tr>
<tr>
<td>Contemporary</td>
<td>Peaceful</td>
</tr>
<tr>
<td>Authentic</td>
<td>Unique</td>
</tr>
<tr>
<td></td>
<td>Soothing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nothing</td>
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### Emotional benefits

<table>
<thead>
<tr>
<th>(n=110)</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>48.2</td>
<td>122</td>
</tr>
<tr>
<td>Allows me to broaden my horizon</td>
<td>43.6</td>
<td>107</td>
</tr>
<tr>
<td>Allows me to broaden my knowledge</td>
<td>34.5</td>
<td>91</td>
</tr>
<tr>
<td>Enriches my view on the world</td>
<td>34.5</td>
<td>92</td>
</tr>
<tr>
<td>Makes me feel completely liberated</td>
<td>33.6</td>
<td>130</td>
</tr>
<tr>
<td>Allows me to come to my senses</td>
<td>33.6</td>
<td>117</td>
</tr>
<tr>
<td>Restores my sense of harmony and balance</td>
<td>33.6</td>
<td>122</td>
</tr>
<tr>
<td>Makes me stand out from the crowd</td>
<td>23.6</td>
<td>161</td>
</tr>
<tr>
<td>Makes me feel special</td>
<td>28.2</td>
<td>160</td>
</tr>
<tr>
<td>Allows me to impress other people</td>
<td>22.7</td>
<td>134</td>
</tr>
<tr>
<td>Allows me to show my superior lifestyle</td>
<td>18.2</td>
<td>132</td>
</tr>
<tr>
<td>Makes me feel on top of the world</td>
<td>20.9</td>
<td>124</td>
</tr>
</tbody>
</table>

### Personality

<table>
<thead>
<tr>
<th>(n=110)</th>
<th>%</th>
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</tr>
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<tbody>
<tr>
<td>Fresh</td>
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<tr>
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<td>139</td>
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<tr>
<td>Peaceful</td>
<td>36.4</td>
<td>140</td>
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<tr>
<td>Unique</td>
<td>34.5</td>
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<tr>
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<td>119</td>
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<tr>
<td>Extravagant</td>
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<tr>
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<td>Crazy</td>
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### Destination features

<table>
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<tbody>
<tr>
<td>Has nature that offers opportunities for discovery</td>
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<td>47.3</td>
<td>118</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>47.3</td>
<td>181</td>
</tr>
<tr>
<td>Has romantic spots</td>
<td>41.8</td>
<td>126</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>40.9</td>
<td>139</td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>40.9</td>
<td>199</td>
</tr>
<tr>
<td>Is not for just anybody, is exclusive</td>
<td>30.0</td>
<td>243</td>
</tr>
<tr>
<td>Is not ruined by tourism</td>
<td>40.0</td>
<td>196</td>
</tr>
<tr>
<td>Allows me to live close to nature</td>
<td>39.1</td>
<td>150</td>
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<tr>
<td>Is expensive</td>
<td>30.0</td>
<td>150</td>
</tr>
<tr>
<td>Has no kids</td>
<td>16.4</td>
<td>130</td>
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<tr>
<td>Allows me to have unique experiences</td>
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</tr>
<tr>
<td>Has guaranteed sunshine</td>
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<td>125</td>
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<tr>
<td>Has few language barriers</td>
<td>26.4</td>
<td>121</td>
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<tr>
<td><strong>Destination features</strong></td>
<td><strong>Activities</strong></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
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<tr>
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<td><strong>Unique to Norway</strong></td>
<td></td>
</tr>
<tr>
<td>Has beautiful nature</td>
<td>Observe beauty of nature</td>
<td></td>
</tr>
<tr>
<td>Has nature that offers opportunities for discovery</td>
<td>Experience wildlife</td>
<td></td>
</tr>
<tr>
<td>Allows me to be physical active</td>
<td>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</td>
<td></td>
</tr>
<tr>
<td>Allows me to live close to nature</td>
<td>Experience mountains</td>
<td></td>
</tr>
<tr>
<td>Allows me to have unique experiences</td>
<td>Saltwater fishing</td>
<td></td>
</tr>
<tr>
<td>Is expensive</td>
<td><strong>Common ground</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Do winter activities (dog-sleigh, snowmobile etc.)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Experience the wilderness</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visit national parks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alpine skiing/snowboarding</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cross country skiing</td>
<td></td>
</tr>
<tr>
<td><strong>Common ground</strong></td>
<td><strong>Unique to Sweden</strong></td>
<td></td>
</tr>
<tr>
<td>Is not too warm</td>
<td>Visit cities</td>
<td></td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>Experience local architecture</td>
<td></td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>Visit museums</td>
<td></td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>Visit art exhibitions</td>
<td></td>
</tr>
<tr>
<td>Is safe</td>
<td><strong>Unique to Sweden</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visit cities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Experience local architecture</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visit museums</td>
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</tr>
<tr>
<td></td>
<td>Visit art exhibitions</td>
<td></td>
</tr>
<tr>
<td><strong>Unique to Sweden</strong></td>
<td><strong>Personality</strong></td>
<td></td>
</tr>
<tr>
<td>Has good service</td>
<td>Authentic</td>
<td></td>
</tr>
<tr>
<td>Is easy to travel to</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Has classy restaurants</td>
<td>Adventurous</td>
<td></td>
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<tr>
<td></td>
<td>Unique</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Explorative</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Common ground</strong></td>
<td></td>
</tr>
<tr>
<td>Gives me a safe feeling</td>
<td>Peaceful</td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Relaxed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Soothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Unique to Sweden</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cozy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Caring</td>
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### Emotional benefits

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<tr>
<th>Benefit</th>
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<tbody>
<tr>
<td>Gives me a safe feeling</td>
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</tr>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>63.1</td>
<td>110</td>
</tr>
<tr>
<td>Allows me to broaden my horizon</td>
<td>59.0</td>
<td>99</td>
</tr>
<tr>
<td>Helps me to meet new people</td>
<td>57.4</td>
<td>101</td>
</tr>
<tr>
<td>Allows me to broaden my knowledge</td>
<td>57.4</td>
<td>103</td>
</tr>
<tr>
<td>Allows me to keep everything under control</td>
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<td>128</td>
</tr>
<tr>
<td>Avoids too much surprises</td>
<td>35.2</td>
<td>125</td>
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### Personality

<table>
<thead>
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<tbody>
<tr>
<td>Cultivated</td>
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<td>146</td>
</tr>
<tr>
<td>Contemporary</td>
<td>51.6</td>
<td>134</td>
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<tr>
<td>Cozy</td>
<td>50.0</td>
<td>134</td>
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<tr>
<td>Friendly</td>
<td>48.4</td>
<td>114</td>
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<tr>
<td>Harmonious</td>
<td>46.7</td>
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<table>
<thead>
<tr>
<th>Personality</th>
<th>%</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Structured</td>
<td>40.2</td>
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<tr>
<td>Peaceful</td>
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<td>134</td>
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<tr>
<td>Soothing</td>
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<td>Fresh</td>
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<td>128</td>
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<tr>
<td>Caring</td>
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<td>127</td>
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<tr>
<td>Practical</td>
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### Destination features

<table>
<thead>
<tr>
<th>Feature</th>
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<tbody>
<tr>
<td>Is not too warm</td>
<td>77.0</td>
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<tr>
<td>Is safe</td>
<td>75.4</td>
<td>154</td>
</tr>
<tr>
<td>Has good service</td>
<td>73.0</td>
<td>125</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>71.3</td>
<td>149</td>
</tr>
<tr>
<td>Has good medical care</td>
<td>67.2</td>
<td>156</td>
</tr>
<tr>
<td>Has unspoiled nature</td>
<td>48.4</td>
<td>145</td>
</tr>
<tr>
<td>Is not ruined by tourism</td>
<td>45.1</td>
<td>136</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>56.6</td>
<td>133</td>
</tr>
<tr>
<td>Is well organized</td>
<td>58.2</td>
<td>122</td>
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</table>

<table>
<thead>
<tr>
<th>Feature</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experience local architecture</td>
<td>67.2</td>
<td>116</td>
</tr>
<tr>
<td>Discover local history and legends</td>
<td>64.8</td>
<td>109</td>
</tr>
<tr>
<td>Visit museums</td>
<td>63.9</td>
<td>114</td>
</tr>
<tr>
<td>Do winter activities (dog-sleigh, snow mobile etc)</td>
<td>43.4</td>
<td>190</td>
</tr>
<tr>
<td>Cross country skiing</td>
<td>30.3</td>
<td>153</td>
</tr>
<tr>
<td>Visit art exhibitions</td>
<td>50.8</td>
<td>131</td>
</tr>
<tr>
<td>Alpine skiing/snow boarding</td>
<td>35.2</td>
<td>122</td>
</tr>
<tr>
<td>Fresh water fishing</td>
<td>30.3</td>
<td>120</td>
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</table>
# Comparison Switzerland vs. Norway (Russian base)

## Destination features

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Unique to Norway</th>
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<tbody>
<tr>
<td>Is not ruined by tourism</td>
<td>Allows me to live close to nature</td>
</tr>
<tr>
<td>Allows me to have unique experiences</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Common ground</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has beautiful nature</td>
<td>Is not too warm</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>Has unspoiled nature</td>
</tr>
<tr>
<td>Has quiet environments</td>
<td>Has nature that offers opportunities for discovery</td>
</tr>
<tr>
<td>Is safe</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Unique to Switzerland</th>
<th>Unique to Switzerland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has good service</td>
<td>Has romantic spots</td>
</tr>
<tr>
<td>Has classy restaurants</td>
<td>Is an upper class destination</td>
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## Activities

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Unique to Norway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observe natural phenomenon (i.e. northern lights etc.)</td>
<td>Visit national parks</td>
</tr>
<tr>
<td></td>
<td>Saltwater fishing</td>
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</table>

<table>
<thead>
<tr>
<th>Common ground</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observe beauty of nature</td>
<td>Experience wildlife</td>
</tr>
<tr>
<td>Do winter activities (dog-sleigh, snowmobile etc.)</td>
<td>Experience wilderness</td>
</tr>
<tr>
<td>Experience wilderness</td>
<td>Experience mountains</td>
</tr>
<tr>
<td>Alpine skiing/snowboarding</td>
<td>Cross-country skiing</td>
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</table>

<table>
<thead>
<tr>
<th>Unique to Switzerland</th>
<th>Unique to Switzerland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxation</td>
<td>Get pampered</td>
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## Emotional benefits

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Unique to Norway</th>
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<tbody>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>Helps me to escape from my hectic daily life</td>
</tr>
<tr>
<td>Helps me to escape from my hectic daily life</td>
<td>Restores my sense of harmony and balance</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Common ground</th>
<th>Common ground</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gives me a safe feeling</td>
<td>Allows me to come to my senses</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique to Switzerland</th>
<th>Unique to Switzerland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow me to indulge in a bit of luxury</td>
<td>Shows that I am successful in life</td>
</tr>
<tr>
<td>Gives me a sense of being well cared for</td>
<td></td>
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</tbody>
</table>

## Personality

<table>
<thead>
<tr>
<th>Unique to Norway</th>
<th>Unique to Norway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentic</td>
<td>Active</td>
</tr>
<tr>
<td>Soothing</td>
<td>Unique</td>
</tr>
<tr>
<td>Adventurous</td>
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<table>
<thead>
<tr>
<th>Common ground</th>
<th>Common ground</th>
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<tbody>
<tr>
<td></td>
<td>Peaceful</td>
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</table>

<table>
<thead>
<tr>
<th>Unique to Switzerland</th>
<th>Unique to Switzerland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivated</td>
<td>Structured</td>
</tr>
<tr>
<td>Classy</td>
<td>Cozy</td>
</tr>
<tr>
<td>Emotional benefits</td>
<td>%</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----</td>
</tr>
<tr>
<td>Gives me a safe feeling</td>
<td>68,9</td>
</tr>
<tr>
<td>Allows me to discover new and interesting places</td>
<td>68,9</td>
</tr>
<tr>
<td>Allows me to broaden my horizon</td>
<td>64,4</td>
</tr>
<tr>
<td>Allows me to come to my senses</td>
<td>62,2</td>
</tr>
<tr>
<td>Gives me a sense of being well cared for</td>
<td>62,2</td>
</tr>
<tr>
<td>Allows me to indulge myself with a bit of luxury</td>
<td>62,2</td>
</tr>
<tr>
<td>Shows that I am successful in life</td>
<td>55,6</td>
</tr>
<tr>
<td>Makes me feel on top of the world</td>
<td>51,1</td>
</tr>
<tr>
<td>Allows me to show my superior lifestyle</td>
<td>37,8</td>
</tr>
<tr>
<td>Makes me feel special</td>
<td>44,4</td>
</tr>
<tr>
<td>Makes me feel sophisticated</td>
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</tr>
<tr>
<td>Avoids too much surprises</td>
<td>46,7</td>
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</table>

<table>
<thead>
<tr>
<th>Personality</th>
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<tr>
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<tr>
<td>Cozy</td>
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<td>Peaceful</td>
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<td>138</td>
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<tr>
<td>Contemporary</td>
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<td>116</td>
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<tr>
<td>Classy</td>
<td>46,7</td>
<td>141</td>
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<tr>
<td>Structured</td>
<td>40,0</td>
<td>132</td>
</tr>
<tr>
<td>Soothing</td>
<td>46,7</td>
<td>130</td>
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<tr>
<td>Fresh</td>
<td>42,2</td>
<td>124</td>
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<tr>
<td>Superior</td>
<td>22,2</td>
<td>121</td>
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<tr>
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<tr>
<td>Has good medical care</td>
<td>80,0</td>
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<tr>
<td>Has good service</td>
<td>80,0</td>
<td>120</td>
</tr>
<tr>
<td>Is an upper class destination</td>
<td>73,3</td>
<td>238</td>
</tr>
<tr>
<td>Is not for just anybody, is exclusive</td>
<td>51,1</td>
<td>223</td>
</tr>
<tr>
<td>Is expensive</td>
<td>71,1</td>
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<tr>
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<td>73,3</td>
<td>143</td>
</tr>
<tr>
<td>Has environmentally friendly offers</td>
<td>66,7</td>
<td>137</td>
</tr>
<tr>
<td>Is not too warm</td>
<td>66,7</td>
<td>136</td>
</tr>
<tr>
<td>Is safe</td>
<td>73,3</td>
<td>132</td>
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<tr>
<td>Has nature that offers opportunities for discovery</td>
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<td>129</td>
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<tr>
<td>Has unspoiled nature</td>
<td>46,7</td>
<td>122</td>
</tr>
<tr>
<td>Has romantic spots</td>
<td>75,6</td>
<td>122</td>
</tr>
<tr>
<td>Allows me to grow personally</td>
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<td>121</td>
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<table>
<thead>
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<tr>
<td>Experience mountains</td>
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<td>181</td>
</tr>
<tr>
<td>Alpine skiing/snowboarding</td>
<td>77,8</td>
<td>249</td>
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<tr>
<td>Observe beauty of nature</td>
<td>75,6</td>
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<tr>
<td>Visit cities</td>
<td>73,3</td>
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<tr>
<td>Attend sightseeing tours</td>
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<tr>
<td>Extreme sport activities (mountain climbing, kiting, paragliding etc)</td>
<td>57,8</td>
<td>186</td>
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<tr>
<td>Cross country skiing</td>
<td>33,3</td>
<td>156</td>
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<tr>
<td>Do winter activities (dog-sleigh, snow mobile etc)</td>
<td>37,8</td>
<td>153</td>
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<tr>
<td>Visit spa resorts</td>
<td>42,2</td>
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<td>Visit or take part in sports events</td>
<td>37,8</td>
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<tr>
<td>Fresh water fishing</td>
<td>33,3</td>
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</table>
C) Overall positioning & targeting
<table>
<thead>
<tr>
<th>Segment</th>
<th>Liberation</th>
<th>Sharing Good Times</th>
<th>Togetherness</th>
<th>Harmony</th>
<th>Routine</th>
<th>Broadening your horizon</th>
<th>Luxury</th>
<th>Exploration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ski holiday</td>
<td>42 %</td>
<td>14 %</td>
<td>16 %</td>
<td>3 %</td>
<td>8 %</td>
<td>5 %</td>
<td>2 %</td>
<td>10 %</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>8 %</td>
<td>27 %</td>
<td>19 %</td>
<td>5 %</td>
<td>8 %</td>
<td>18 %</td>
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<td>14 %</td>
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<tr>
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<td>21 %</td>
<td>12 %</td>
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<td>4 %</td>
<td>7 %</td>
<td>16 %</td>
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<tr>
<td>Fishing holiday</td>
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<td>17 %</td>
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<td>8 %</td>
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<td>6 %</td>
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<td>13 %</td>
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<tr>
<td>Sightseeing/round trip</td>
<td>8 %</td>
<td>10 %</td>
<td>11 %</td>
<td>5 %</td>
<td>5 %</td>
<td>40 %</td>
<td>1 %</td>
<td>21 %</td>
</tr>
<tr>
<td>Active holiday (golf, rafting, biking etc)</td>
<td>32 %</td>
<td>11 %</td>
<td>16 %</td>
<td>3 %</td>
<td>1 %</td>
<td>13 %</td>
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<td>23 %</td>
</tr>
<tr>
<td>City trip/city break</td>
<td>9 %</td>
<td>14 %</td>
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<td>3 %</td>
<td>4 %</td>
<td>40 %</td>
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<tr>
<td>Cruise holiday</td>
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<td>14 %</td>
<td>13 %</td>
<td>9 %</td>
<td>4 %</td>
<td>45 %</td>
<td>1 %</td>
<td>12 %</td>
</tr>
<tr>
<td>Sun and beach holiday</td>
<td>11 %</td>
<td>18 %</td>
<td>35 %</td>
<td>6 %</td>
<td>5 %</td>
<td>17 %</td>
<td>1 %</td>
<td>7 %</td>
</tr>
<tr>
<td>Camping holiday</td>
<td>26 %</td>
<td>5 %</td>
<td>38 %</td>
<td>1 %</td>
<td>6 %</td>
<td>13 %</td>
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</tr>
<tr>
<td>Cottage holiday (hired/own/borrowed cottage/holiday home)</td>
<td>12 %</td>
<td>7 %</td>
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<td>7 %</td>
<td>10 %</td>
<td>17 %</td>
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</tr>
<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td>12 %</td>
<td>12 %</td>
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<tr>
<td>Short trips/extended weekend trips</td>
<td>9 %</td>
<td>18 %</td>
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<td>8 %</td>
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<tr>
<td>Backpacking</td>
<td>7 %</td>
<td>3 %</td>
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<td>46 %</td>
<td>1 %</td>
<td>33 %</td>
</tr>
<tr>
<td>Summer holiday/main holiday/annual leave</td>
<td>13 %</td>
<td>15 %</td>
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<td>3 %</td>
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<td>5 %</td>
<td>23 %</td>
<td>1 %</td>
<td>15 %</td>
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</tbody>
</table>
### Segments share of occasion – Russia - all destinations

<table>
<thead>
<tr>
<th>Segment</th>
<th>Liberation</th>
<th>Sharing Good Times</th>
<th>Togetherness</th>
<th>Harmony</th>
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<tr>
<td>Sightseeing/round trip</td>
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<td>Active holiday (golf, rafting, biking etc)</td>
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<td>0%</td>
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<td>0%</td>
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<td>Cruise holiday</td>
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<td>22%</td>
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<td>6%</td>
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<td>5%</td>
<td>23%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12%</strong></td>
<td><strong>21%</strong></td>
<td><strong>17%</strong></td>
<td><strong>7%</strong></td>
<td><strong>6%</strong></td>
<td><strong>25%</strong></td>
<td><strong>2%</strong></td>
<td><strong>9%</strong></td>
</tr>
</tbody>
</table>
Ski holiday – Russian tourists

N= 138

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

- Dominated by people aged 30-39 (33%)
- Slightly more relevant for men (54%)
- High education
- 27% of the travelers have a household income of 50,000 Euros or more. 4% makes 100,000 Euro’s per year or more

**WHO travels**

- Moscow (n=88)
- St. Petersburg (n=50)

**WHERE do they travel?**

- Austria: 31% Total, 24% Moscow, 35% St. Petersburg
- Finland: 7% Total, 20% Moscow, 44% St. Petersburg
- Andorra: 9% Total, 13% Moscow, 6% St. Petersburg
- France: 2% Total, 14% Moscow, 8% St. Petersburg
- Switzerland: 7% Total, 6% Moscow, 2% St. Petersburg
- Norway: 4% Total, 2% Moscow, 6% St. Petersburg
- Ukraine: 2% Total, 3% Moscow, 0% St. Petersburg
- Italy: 1% Total, 2% Moscow, 0% St. Petersburg
- Russia: 1% Total, 1% Moscow, 2% St. Petersburg
- Sweden: 1% Total, 0% Moscow, 4% St. Petersburg

**Average length of stay: 8 days**
ACCOMODATION
• Hotel medium standard
• More rented or borrowed cabin / holiday home / flat in St. Petersburg (35%) than in Moscow (15%)
• More hotel high standard in Moscow (15%) than in St. Petersburg (4%)

TRAVEL TO DESTINATION
• Dominated by car
• Scheduled plane

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

PLANNING & ORGANISATION
• Mostly organized individually

HOW do they travel?

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

Legend:
- 25%
- 20%
- 15%
- 10%
- 5%
- 0%

Less than one week before departure
1-3 weeks before departure
Up to 1 month before departure
Up to 2 months before departure
Up to 3 months before departure
Up to 4-6 months before departure
Up to 6-12 months before departure
More than one year before departure
Don't know
**EMOTIONAL BENEFITS**
- Helps me enjoy life to the fullest
- Allows me to share good times with others
- Makes me feel full of energy
- Helps me escape from my hectic daily life
- Restores my sense of harmony and balance

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

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

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

*Slide shows most important items
Bold = differentiating from other holiday types*
**Why do Russians go on a ski holiday?**

**CONCLUSION:**

Liberation is the dominant motivation to go skiing. Other relevant motivations are Togetherness, Sharing Good times and Exploration. In Russia Sharing Good Times and Togetherness are the most relevant segments.
Freeing yourself completely of all daily hassles

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

Key competition
• Austria
• Finland
• Switzerland
• France

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

NOTE: For St. Petersburg it would make sense to also focus on Sharing Good Times.
Sightseeing/roundtrip – Russian tourists
N= 731

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

- Dominated by 30-39 (37%)
- More female (61%) than male (39%)
- High education
- 10% of the travelers have a household income of 50,000 Euros or more. 2% makes 100,000 Euro’s per year or more.

### WHEN do they travel?

Average length of stay: 12 days
ACCOMODATION
• Almost exclusively hotels
• Mostly medium priced

TRAVEL TO DESTINATION
• Dominated by plane
  • Bus
  • Car

WITH WHOM
• More with spouse/partner (51%)
  • Friends (22%)
  • Less with children

PLANNING & ORGANISATION
• More organized tours
  • Also often organized on their own

How do they travel?

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

- Less than one week before departure: 5%
- 1-3 weeks before departure: 15%
- Up to 1 month before departure: 16%
- Up to 2 months before departure: 25%
- Up to 3 months before departure: 15%
- Up to 4-6 months before departure: 18%
- Up to 6-12 months before departure: 6%
- More than one year before departure: 0%
- Don't know: 0%
EMOTIONAL BENEFITS
- Allows me to discover new and interesting places
- Allows me to broaden my horizon
- Allows me to broaden my knowledge
- Enriches my view on the world
- Helps me to enjoy life to the fullest

PERSONALITY
- Cultivated
- Explorative
- Friendly
- Open-minded
- Active

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

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

Why do they travel?

WHAT are they looking for?

Slide shows most important items
Bold = differentiating from other holiday types
Why do people go on a sightseeing/roundtrip?

CONCLUSION:
Broadening your horizon is the dominant motivation for sightseeing. Other relevant motivations are Exploration and Sharing Good times. Broadening your horizon dominates in all markets.
Why?
- By far most important segment (across all markets)
- Although Norway currently lacks the perception, the content does exist in cities like Oslo, Bergen and the Vikings, polar history etc.

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

Key competition
- Italy
- France
- Finland
- Czech Republic
- Unique, one-off destinations/historical sites (‘checking off the list’)

NOTE: consider extending target to Exploration, as there is quite a lot of overlap between the experience that people look for when sightseeing.
City trip/city break – Russian tourists

N= 190

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

- Dominated by people aged 30-39 (34%)
- People 18-39 years constitutes 75% of the travelers
- Higher education
- Slightly more females (57%)
- 14% of the travelers have a household income of 50,000 Euros or more. 6% makes 100,000 Euro’s per year or more

**WHERE do they travel?**

- **Italy**: 12% (Moscow n=113), 13% (St. Petersburg n=77)
- **France**: 11% (Moscow n=113), 12% (St. Petersburg n=77)
- **Spain**: 10% (Moscow n=113), 9% (St. Petersburg n=77)
- **Finland**: 2% (Moscow n=113), 8% (St. Petersburg n=77)
- **Germany**: 3% (Moscow n=113), 6% (St. Petersburg n=77)
- **Ukraine**: 4% (Moscow n=113), 5% (St. Petersburg n=77)
- **Czech Republic**: 5% (Moscow n=113), 5% (St. Petersburg n=77)
- **Belarus**: 5% (Moscow n=113), 4% (St. Petersburg n=77)
- **Sweden**: 4% (Moscow n=113), 4% (St. Petersburg n=77)
- **China**: 3% (Moscow n=113), 3% (St. Petersburg n=77)
- **Norway**: 3% (Moscow n=113), 3% (St. Petersburg n=77)

**Average length of stay**: 8 days

**WHEN do they travel?**

- **January**: 8%, **February**: 9%, **March**: 7%, **April**: 6%, **May**: 12%, **June**: 11%, **July**: 17%, **August**: 11%, **September**: 5%, **October**: 7%, **November**: 4%, **December**: 3%
City trip/city break

Details

**HOW do they travel?**

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

**TRAVEL TO DESTINATION**
- Dominated by scheduled plane
  - Car

**WITH WHOM**
- Spouse/partner (49%)
  - Friends (28%)

**PLANNING & ORGANISATION**
- Mostly self organized

**Details**

How long before your departure did you settle for this trip on this occasion:
- Less than one week before departure: 9%
- 1-3 weeks before departure: 16%
- Up to 1 month before departure: 13%
- Up to 2 months before departure: 22%
- Up to 3 months before departure: 15%
- Up to 4-6 months before departure: 18%
- Up to 6-12 months before departure: 5%
- More than one year before departure: 2%
- Don’t know: 1%
**EMOTIONAL BENEFITS**
- Allows me to broaden my horizon
- Allows me to discover new and interesting places
- Allows me to broaden my knowledge
- Enriches my view on the world
- Allows me to pamper myself

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

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

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

*Bold = differentiating from other holiday types*

*Slide shows most important items*
Why do people go on a City trip/city break?

**CONCLUSION:**
Broadening your horizon is by far the main motivation. Other motivations are Exploration and sharing good times. The same is the case for all markets, except for Netherlands where Sharing good times has a lower share.
City trip/break
Recommended target motivation

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

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

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

Broadening your Horizon
Holiday to experience nature – Russian tourists

N= 89

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

WHO travels

DEMOGRAPHICS

• Dominated by people aged 30-49 (58%)
• People 18-49 years constitutes 90% of the travelers
• Higher education (71%)
• Slightly more males (57%)
• 10% of the travelers have a household income of 50,000 Euros or more. 2% makes 100,000 Euro’s per year or more

WHERE do they travel?

Norway 7%

Average length of stay: 14 days

WHEN do they travel?

Jan: 13%  Feb: 1%  Mar: 4%  Apr: 4%  May: 7%  Jun: 9%  Jul: 21%  Aug: 11%  Sep: 10%  Oct: 7%  Nov: 4%  Dec: 7%

To low bases to do regional breakdowns. N=89
Holiday to experience nature
Details

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

**TRAVEL TO DESTINATION**
- Dominated by plane
  - Car

**WITH WHOM**
- Spouse/partner (64%)
  - Friends (34%)

**PLANNING & ORGANISATION**
- Mostly self organized

**HOW do they travel?**

- Less than one week before departure: 11%
- 1-3 weeks before departure: 18%
- Up to 1 month before departure: 12%
- Up to 2 months before departure: 21%
- Up to 3 months before departure: 13%
- Up to 4-6 months before departure: 12%
- Up to 6-12 months before departure: 6%
- More than one year before departure: 6%
- Don’t know: 0%

How long before your departure did you settle for this trip on this occasion?
Holiday to experience nature
Details

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

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

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

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

*Slide shows most important items
Bold = differentiating from other holiday types*
Why do people go on a Holiday to experience nature?

CONCLUSION:
Broadening your horizon in Russia than in the other markets, togetherness is the other important segment.
Why?

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

Leveraging brand Norway

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

Key competition

- Close to home destinations
- Finland
- Ukraine
- Egypt
Cottage holiday – Russian tourists

N= 76

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

- Dominated by people aged 25-49 (78%)
- Higher education (79%)
- Slightly more females (58%)
- 5% of the travelers have a household income of 50,000 Euros or more. No one makes 100,000 Euro’s per year or more

**WHO travels**

- Finland: 59%
- Ukraine: 12%
- Croatia: 4%
- Turkey: 4%
- Estonia: 3%
- Germany: 3%
- Norway: 3%
- Spain: 3%
- Austria: 1%
- Azerbaijan: 1%

To low bases to do regional breakdowns. N= 76
**ACCOMODATION**
- Rented or borrowed cabin / holiday home / flat

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

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

**PLANNING & ORGANISATION**
- Almost exclusively organized by themselves

**HOW do they travel?**

**Cottage holiday Details**

**Details**

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

- Less than one week before departure: 11%
- 1-3 weeks before departure: 16%
- Up to 1 month before departure: 26%
- Up to 2 months before departure: 17%
- Up to 3 months before departure: 12%
- Up to 4-6 months before departure: 18%
- Up to 6-12 months before departure: 0%
- More than one year before departure: 0%
- Don’t know: 0%
**EMOTIONAL BENEFITS**

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

**PERSONALITY**

- Harmonious
- Soothing
- Peaceful
  - Cozy
  - Relaxed

**DESTINATION FEATURES**

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

**ACTIVITIES**

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

*Slide shows most important items
Bold = differentiating from other holiday types*
CONCLUSION
Togetherness dominates as motivation. Broadening your horizon and Exploration/Liberation follows. Some differences in the markets.
**Cottage**
**Recommended target motivation**

**Togetherness**

- Strengthening family ties

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

**Key competition**
- Finland
- Ukraine
- **PROXIMITY IS KEY**

**Leveraging brand Norway**
- Living close to nature, getting away from everything
- Importance of family-friendly activities
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