

Report for the German market

August 2012

Basic motivations for going on holiday
Needs based segmentation - Censydiam

Developed for: Innovation Norway



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

Executive summary - Main findings

- Fundamental meaning of going on holiday across the three markets
 - ⇒ In the quantitative study, we found that there are some common denominators across all types of holiday and across all segments:
 - ⇒ Holidays abroad must always help people to escape from their daily lives!
 - ⇒ The core of all holidays is about escapism, discovering new and interesting places and being together. All holidays must fulfil these criteria regardless of the type of holiday.
- The segments
 - ⇒ The research has identified eight motivational segments; Liberation, Sharing Good Times, Togetherness, Harmony, Routine, Broadening your Horizon, Luxury and Exploration.
- Across the three markets Norway is 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: 'Allows me to discover new and interesting places', 'Helps me to escape from my hectic daily life', 'Gives me rich experiences', 'Allows me to broaden my horizon' and 'Enriches my view of the world'
- ⇒ Personality associated with Norway: 'Peaceful', 'Friendly', 'Authentic', 'Active' and 'Soothing'
- ⇒ Destination features associated with Norway: 'Has beautiful nature', 'Has nature that offers opportunities for discovery', 'Is not too warm', 'Has unspoiled nature' and 'Has quiet environments'
- ⇒ Activities associated with Norway: 'Observe beauty of nature', 'Observe natural phenomenon', 'Experience the wilderness', 'Do winter activities' and 'Visit the countryside'

- 21% of the Germans in the sample have visited Norway, which is lower than for Sweden and Denmark.
- However Norway is the most frequently considered Scandinavian holiday destination in Germany. This demonstrates that Norway has unrealised potential.
- 34% 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 does not attract a lot of (repeat) visitors
 - ⇒ The proportion of people who have ever visited Norway is low compared to other destinations
 - ⇒ Repeat visiting is also lower than average
- Norway does not clearly 'own' any motivational segment
 - ⇒ In Germany, Norway is often associated with Exploration and Broadening your Horizon.
 - ⇒ But the strength of this association is relatively weak

1a. Introduction

Background and who we spoke to in the research

The purpose of the research:

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



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



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

- What is the ideal holiday?
- How are destinations (brands) positioned?

COMMUNICATION

Evaluate / Confirm current direction for Norway

Cross-country



Germany

Russia

The Netherlands

PRODUCTS

Choose target for each holiday type

Skiing

Sightseeing/roundtrip

City trip/city break

Camping

Experience nature

Cottage

Active holiday

We have created
qualitative hypothesis
four focus groups in each country

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

Who did we speak to:

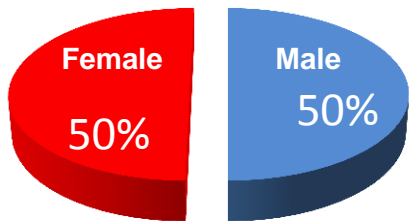
To be included in the study, the respondent had to have been on a holiday abroad that included at least three overnight stays during the past 24 months, and where the trip was not paid for by their employer.

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

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

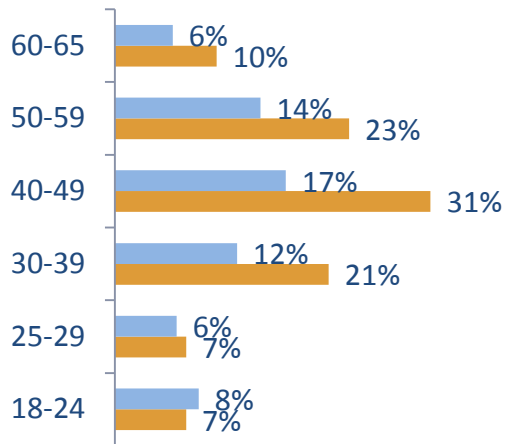
Demographics of the **survey sample** compared with the **total population**

Gender

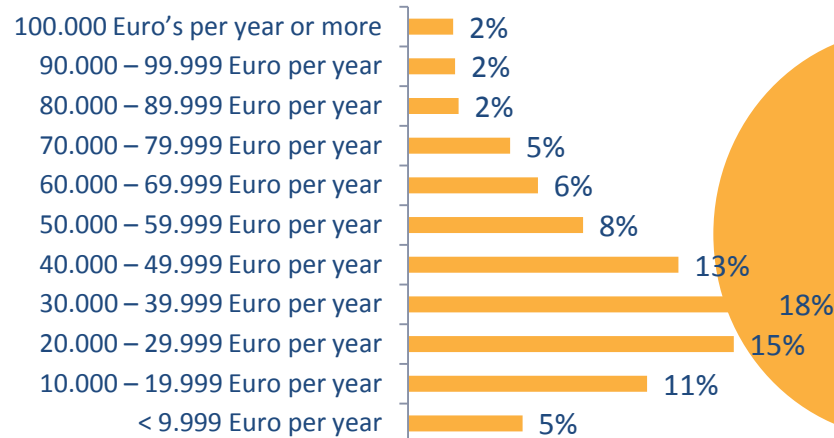


Total population:
Females 51%, males 49%

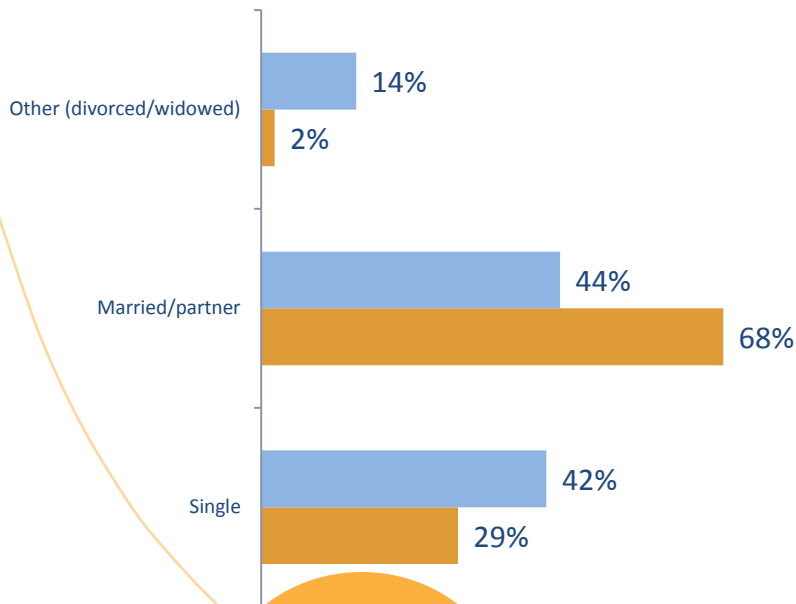
Age



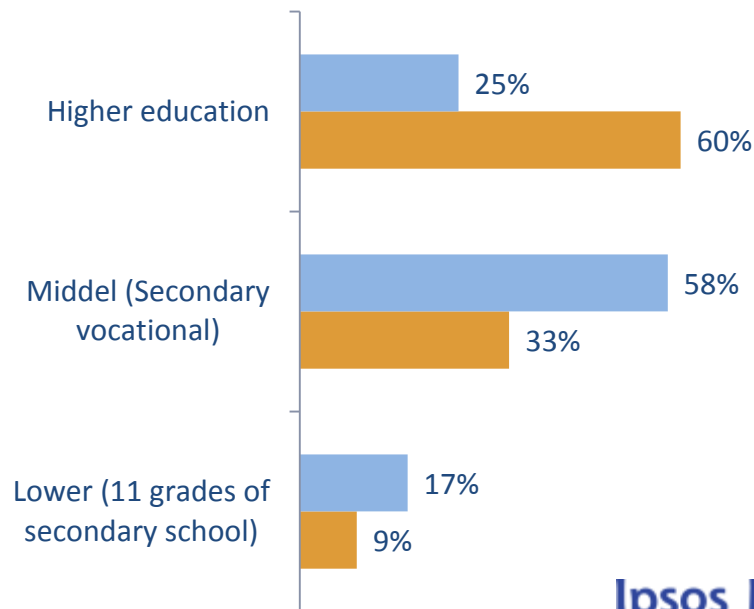
Income



Marital status



Educational level



In this report, we also look at regional differences within Germany.
The following 'bundesländer' constitute the regions:

West

Hesse
North Rhine-
Westphalia
Rhineland-Palatinate
Saarland
(n = 2110)

North

Schleswig-Holstein
Hamburg
Bremen
Lower Saxony
(n = 925)

South

Baden-Württemberg
Bavaria
(n = 1850)

East

Berlin
Brandenburg
Mecklenburg-
Vorpomern
Saxony
Saxony-Anhalt
Thuringia
(n = 1320)

As this study is occasion based the n refers to number of travels in each region.
Number of travels in total for the German sample is 6205.


1b. Introduction

Basic motivations for going on holiday

The same person, but different situations and different motivations

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





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

20% Conscious

80%

Sub-conscious

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

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

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



The research helps us to do this...

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



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

- *The vertical axis is the personal dimension*

Enjoy to the fullest
Impulsive



Controlled
Planned

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

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

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



On this side of the axis, we have people who approach the ideal holiday in an individual manner and try to **distinguish** themselves from their surroundings by means of this new world.

They use this escape to deliver a certain performance. These people are relatively active and have a need for expansion, cultivation and discovery.

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

1c. Introduction

How these needs and motivations can be identified?

Background to the project

- Why do people travel?

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

- People travel abroad because the holiday or destination in some sense serves certain needs. These needs may be fundamentally physiological (e.g. a place to sleep = hotel).
- But when several options can satisfy the same need, a role for branding arises. People use holidays to satisfy more psychological needs and people choose types of holidays to reflect their personality, convey who they are to others, fulfil a deeper meaning in life, reinforce their own self-concept etc.
- Hence, psychological needs play an important role in consumers' 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'?

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

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

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

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

Instead of product focus...



'Rorbuferie'/ holiday in a fisherman's cabin

...focus on motivational benefit



Share good times with others

...or personality

or



Active, explorative and adventurous

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

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

Research objective:

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



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

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

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

What do we ask about?

**Actual
holidays***

Ideal holidays

**Perception of
Norway**

What answers can that give us?

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

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

Can be explained by four different factors



Explanation of the four factors of an ideal holiday

This is about the tourist

▪ Emotional benefits sought (emotional)

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

▪ Personality of the destination (emotional)

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

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

▪ Set of activities (functional)

- ⇒ Examples: Fishing, skiing, hiking

▪ Destination features (functional)

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

This is about the destinations

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

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

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



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

2. Fundamental meaning of going on holiday

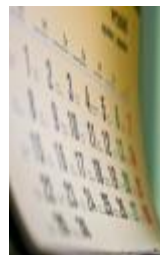


We start with cultural context because it is vital for understanding and communicating with the German market

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

General understanding of German culture

- German culture can generally be characterised as being **rather formal**, with a high degree of discipline. People strive for stability and security.
- Germany is also a rather **normative society**, fitting in and adapting to the general rules and habits is considered important. Social pressure to **behave according to the norms** is also rather high, which is expressed in social conventions, but also in **fashion** and **style**.
- These **norms** can have positive aspects as they **offer security** and constitute an anchor point for how to behave, but they also mark **limits and boundaries** from which it is hard to deviate, e.g. when it comes to treating such norms less strictly, taking a more intuitive approach to styles, etc.
- Striving for (financial) advancement, combined with high **confidence in technological superiority** are also typical. Hence, technology and engineering are considered important.
- All this leads to the fact that **motivations of control, protection** and **looking for security** are **rather strongly represented** in Germany, while people find it difficult to apply a more open, intuitive and playful attitude.



General perspective on the role of holidays in German culture

Holidays allow Germans to:

- **Escape** from daily routine and demands, **to let go** and enjoy all the things that are normally not on the agenda.
- It is a moment/period of time to **break with routine** and normal **responsibilities**.
- **Being someone different**, entering a world that is different from people's daily lives, a place where one can act and **feel different**.
- To relax and **recover** from the fast pace and demands of modern life in order to **feel invigorated** and be able to cope with upcoming tasks.
- A means to **broaden one's horizon**, to see things from a different perspective by getting to know new cultures, countries, people, customs and ways of life, etc. In a sense, to **be humble** and to put one's **own way of life into perspective**.

There is a **trend towards short breaks**, Germans find it natural to go on holidays to **European cities**, which has become much **more convenient** (€ = single currency) and **affordable** (cheaper flights).

However, **short breaks to more exclusive places/ destinations** (e.g. shopping in London, wellness/spa in Davos, Switzerland, etc.), are also a means of **showing** that **one is well-off**, i.e. a kind of **status symbol** for some people.

Key learning

- A moment/time of year to **escape from daily routine** and to enjoy a feeling of **freedom and easiness**, being free from responsibilities.

Core elements in holidays abroad

Germans have some **clear requirements** when it comes to holidays abroad:

- First of all, **versatility**, people want to have a **great variety of different activities** they can potentially enjoy, e.g. nature, culture, sports activities, sightseeing, entertainment etc. These should be **easily accessible**, within easy reach, ideally activities that can be enjoyed in close proximity to their holiday destination.
- **Accommodation** is quite important to Germans, they seek **comfortable** and **cozy** accommodation, which serves as a kind of **retreat** for **relaxation** purposes, where they can unwind, spend 'quality-time' with others. Although holidays are a means of escaping the grind of daily routine/ letting go, etc., Germans also need a place where they **can feel they are in good hands**, a shelter to withdraw to, something neat and orderly.
- **Open-minded** and **sociable** people with a **welcoming** and **friendly attitude** to **getting to know** the **native culture** and **habits**, to **celebrate life**, and they **make new acquaintances easily**.
- In principle, the **sociability** aspect is a **highly important ingredient**. People seek **casual contact** either with **locals** or **other tourists**, the opportunity to meet others and not spend their holidays in isolation.
- **Weather** builds the **general framework** for the holiday, Germans usually seek a **reliable climate** (not necessarily hot weather but rainy weather is certainly not the norm), which allows them to **spend time comfortably outdoors** and they are not forced to equip themselves against nasty conditions.

Key learning

- **Versatility is key**, a combination of aspects such as **nature, culture**, etc., which should be combined with a **welcoming attitude** and **stable weather conditions**.

The role and meaning of activities on holidays abroad

Although holidays abroad represent **relaxation, forgetting about the responsibilities and obligations** of daily life, **becoming a different person**, letting go, adopting a different mentality, being more **nonchalant, carefree** etc., they are also about **exploring new things**, doing things that are normally not on the agenda.

Thus people generally want to have the opportunity to **experience new activities** and **impressions**, they are eager to find a **destination that offers variation**.

Since **holidays abroad** usually have a **duration of a minimum of two weeks**, a **limited or unvaried** range of activities is unacceptable. It is important for people that they can potentially **take advantage of a wide range of activities**, including:

- **Culture, interesting cities** within easy reach (for sightseeing, shopping, eating, entertainment, museums).
- **Sporty and fun activities** or a combination of both that people can do spontaneously with the kids or alone.
- **Nature, not too rough or extreme** but still **accessible**, so that people can explore it on their own without feeling insecure and unsafe.
- **Sociable and convivial activities**, enjoying some moments of **cheerful togetherness**, e.g. going out for dinner, eating together.

General decision-making process: Where to go and what to do

There is **no general pattern** for how the process is structured. First the basics are determined: **When** and **who**? Then, different influences come into play such as:

- **Third parties, friends, relatives, colleagues**, who share their experience with regard to travel destinations and bring in new ideas and proposals.
- **Travel diaries/travelogues** in magazines, on TV, internet, etc. that arouse people's interest in destinations abroad.
- Sometimes, people have an opportunity to use **friends** or **relatives' accommodation** abroad at a reasonable rate, which is a strong influencer.
- **Climate** and **weather** is another **important dimension** within the overall decision-making process, especially for **longer holidays** when Germans **don't want to take any risks**.

When a destination is chosen, people check the **financial feasibility** of the project, some prefer to spend holidays in **neighbouring countries** since they can travel by car which makes the journey less expensive. This is especially relevant for **families with children**.

People without children book **noncyclical** (low season), they want to **avoid higher costs, hot weather, crowds of tourists**.

As for **short breaks**, special cheap flight offers can **influence** or even **trigger** the decision to visit a European city.

Holidays vs. breaks abroad

HOLIDAYS

- Longer holidays are **carefully planned**, Germans usually take time planning their main holiday (normally two to three weeks during summer for families with children)
- Holidays are traditionally a '**family affair**', the planning and decision-making process is **democratic**, i.e. the **kids also have a say** and voice their wishes.
- For **longer holidays**, **weather** and **climate** are a **decisive** factor, many Germans **don't want to take risks** in this respect and **sunny Southern destinations** are often therefore **preferred**.
- **Holidays** should always include elements of **nature**, **landscape**, **rejuvenation**, etc. while **breaks** are frequently linked to **culture**, **sightseeing**, **shopping**, etc.

BREAKS

- **Breaks abroad** have become **much more common** and **quite popular recently**, people enjoy visiting **foreign cities**, to **get a taste of a different culture/ lifestyle** for a short while, to experience *savoir-vivre*, etc.
- Usually a **mix** of **sightseeing** and **shopping**. Due to the **affordability** of flying to European destinations, breaks abroad have become more popular than they were previously.
- Often quite **spontaneous**, e.g. coming across a cheap flight/ special offer (e.g. Lufthansa newsletter) by chance and deciding to take a trip over the weekend or bank holiday weekend.
- Breaks are perceived as being **busier**, they are **less about relaxation**, people often have a **full schedule** (visiting relevant spots, shopping), which they like to work off.
- People with children usually **benefit** from breaks as a time to spend some time with their partner, leaving the kids at home and enjoying some 'me-time' again.



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

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

The core of all holidays is about:

Escapism

**New and
interesting places**

Being together

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

What German 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 German tourists' expectation lists for their ideal holiday

WHAT

are they looking for?

DESTINATION FEATURES

- Has friendly people
- Has beautiful nature
- Has interesting sights
- Offers a wide range of activities
- Is easy to travel around

ACTIVITIES

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

WHY

are they travelling

EMOTIONAL BENEFITS

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

PERSONALITY

- Friendly
- Relaxed
- Harmonious
 - Active
 - Peaceful

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

What German 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 German tourists' expectation lists for their ideal holiday

ACCOMODATION

- Hotel, medium standard (30%)
- Cabin/holiday home (20%)
- Hotel, high standard (16%)

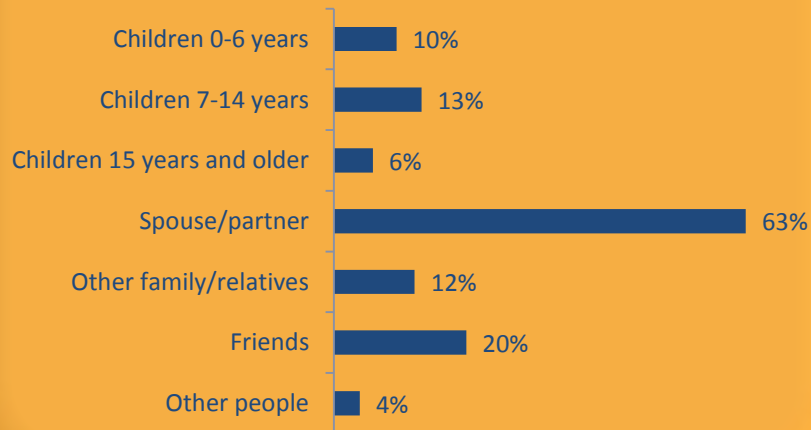
TRAVEL TO DESTINATION

- Car (51%)
- Scheduled flight (28%)
- Charter flight (15%)

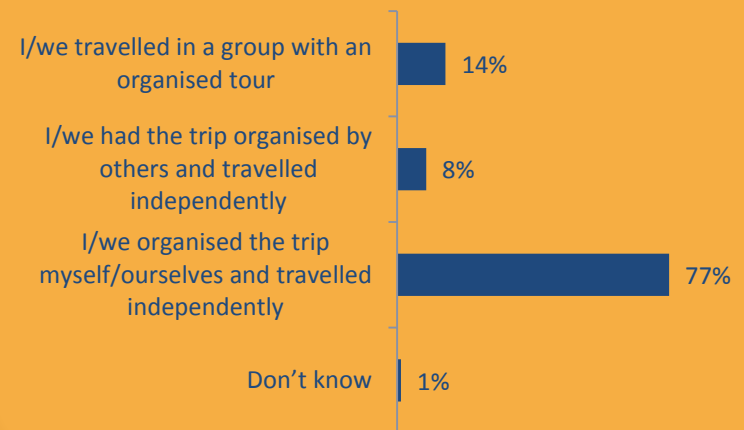
HOW

do they travel?

WITH WHOM

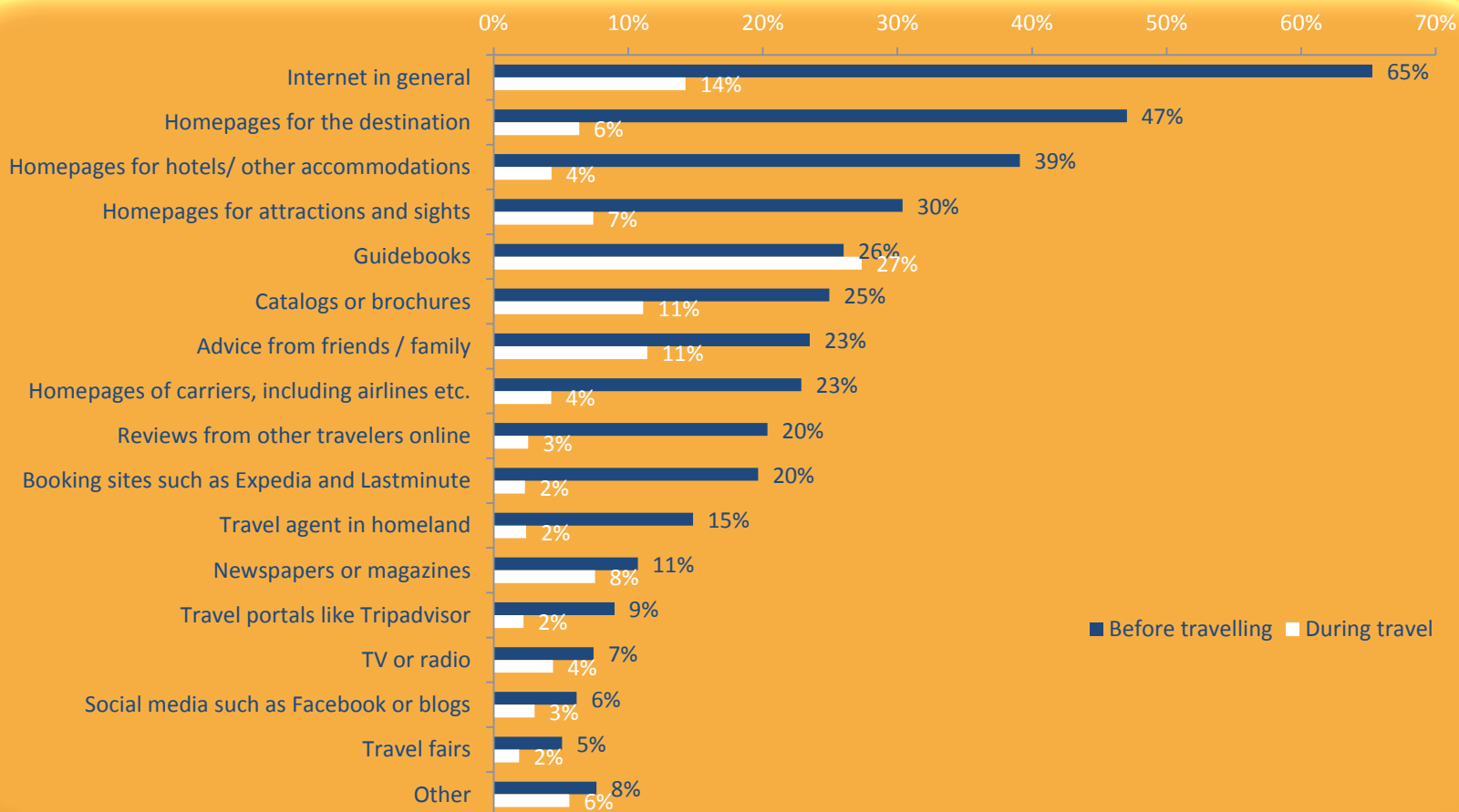


ORGANISATION



What information sources German 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 ■ During travel

3. The segments



All the holidays reported in the German sample

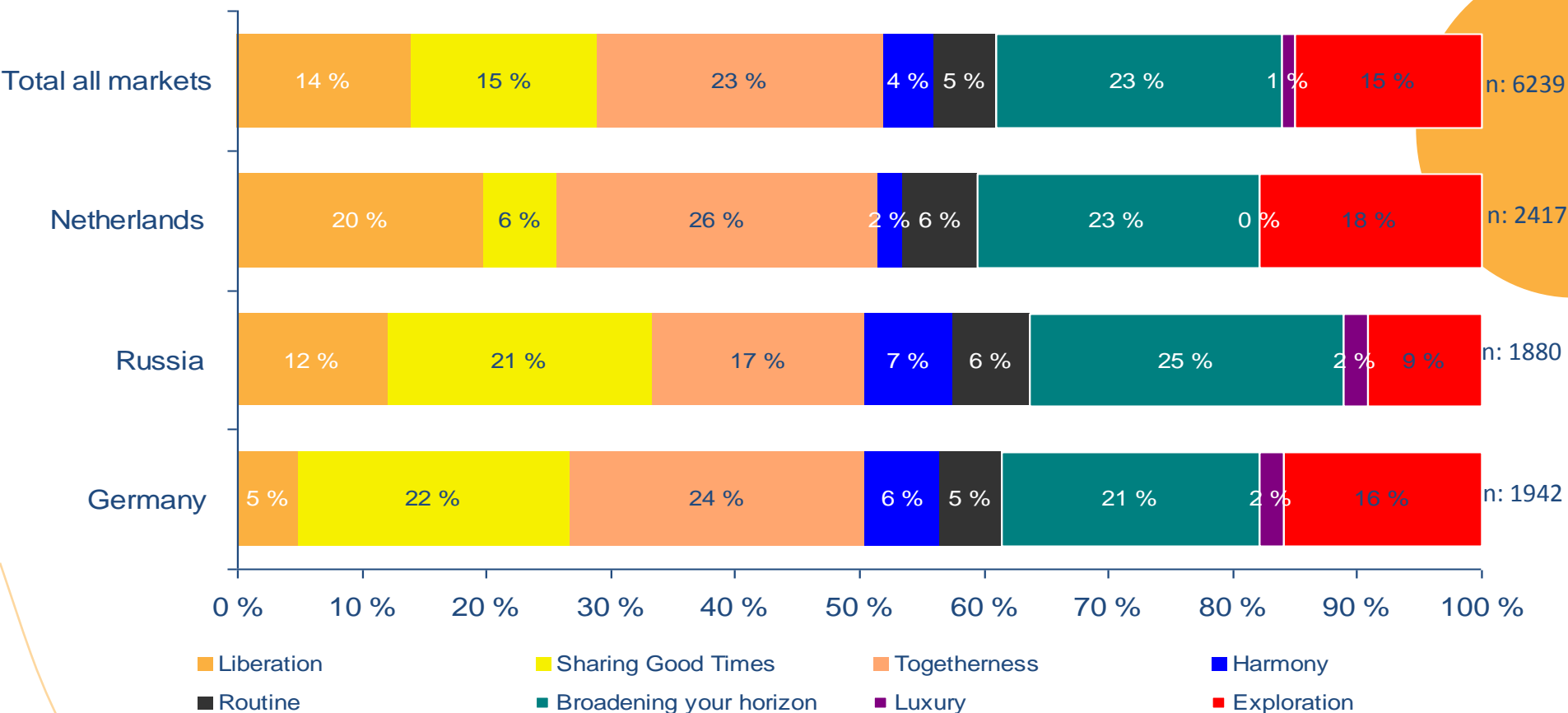
The reason why German tourists travel - The essence and size of each segment*



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

Segment share by market

- All three countries – all types of holiday

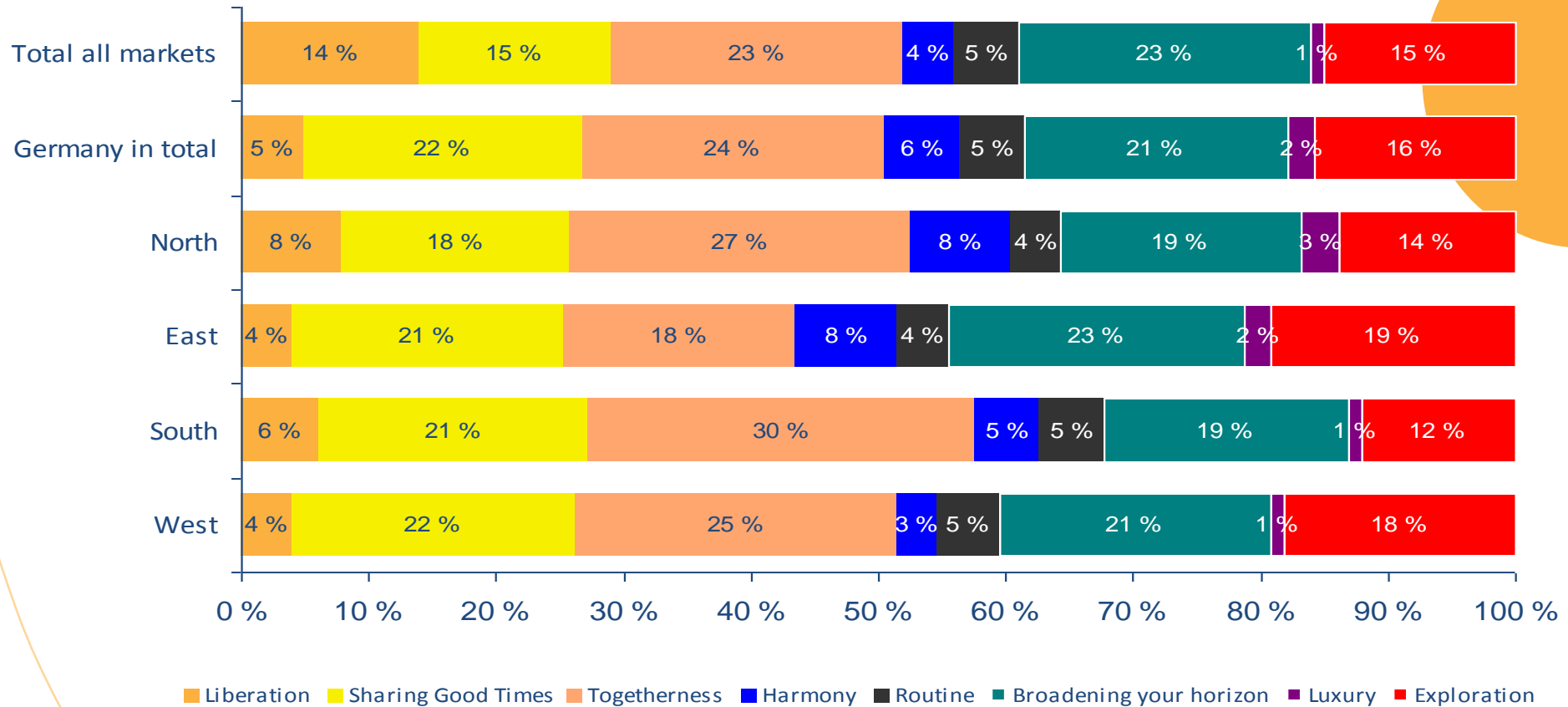


n = visits abroad

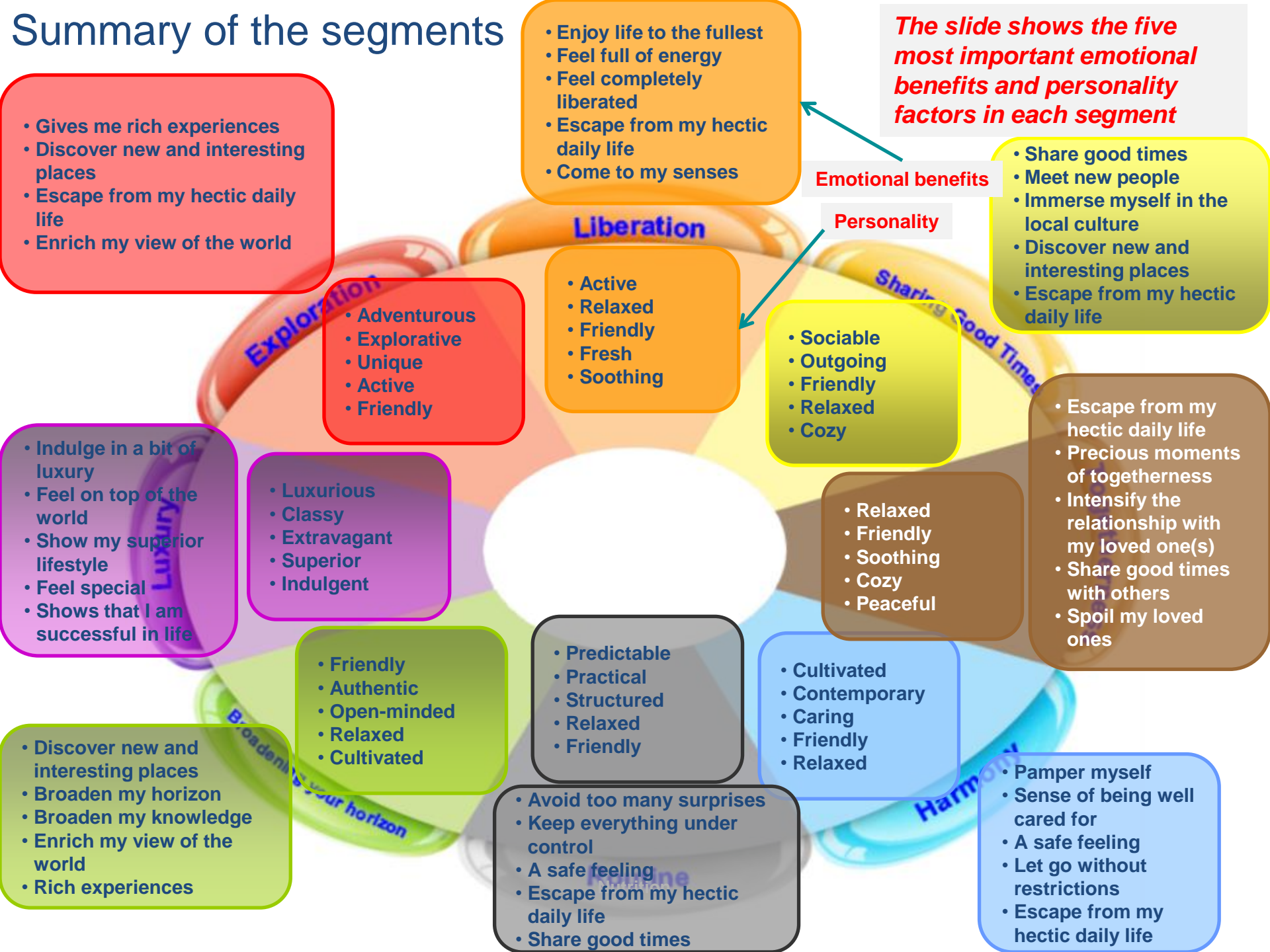
n = all holidays profiled in the quantitative sample (for each country).

REGIONAL DIFFERENCES IN GERMANY

Segment share – all types of holiday



Summary of the segments



Summary of the segments

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

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

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

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

Destination features

Activities

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

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

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

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

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

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

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

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

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

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

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

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

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

4. Assessment of Norway

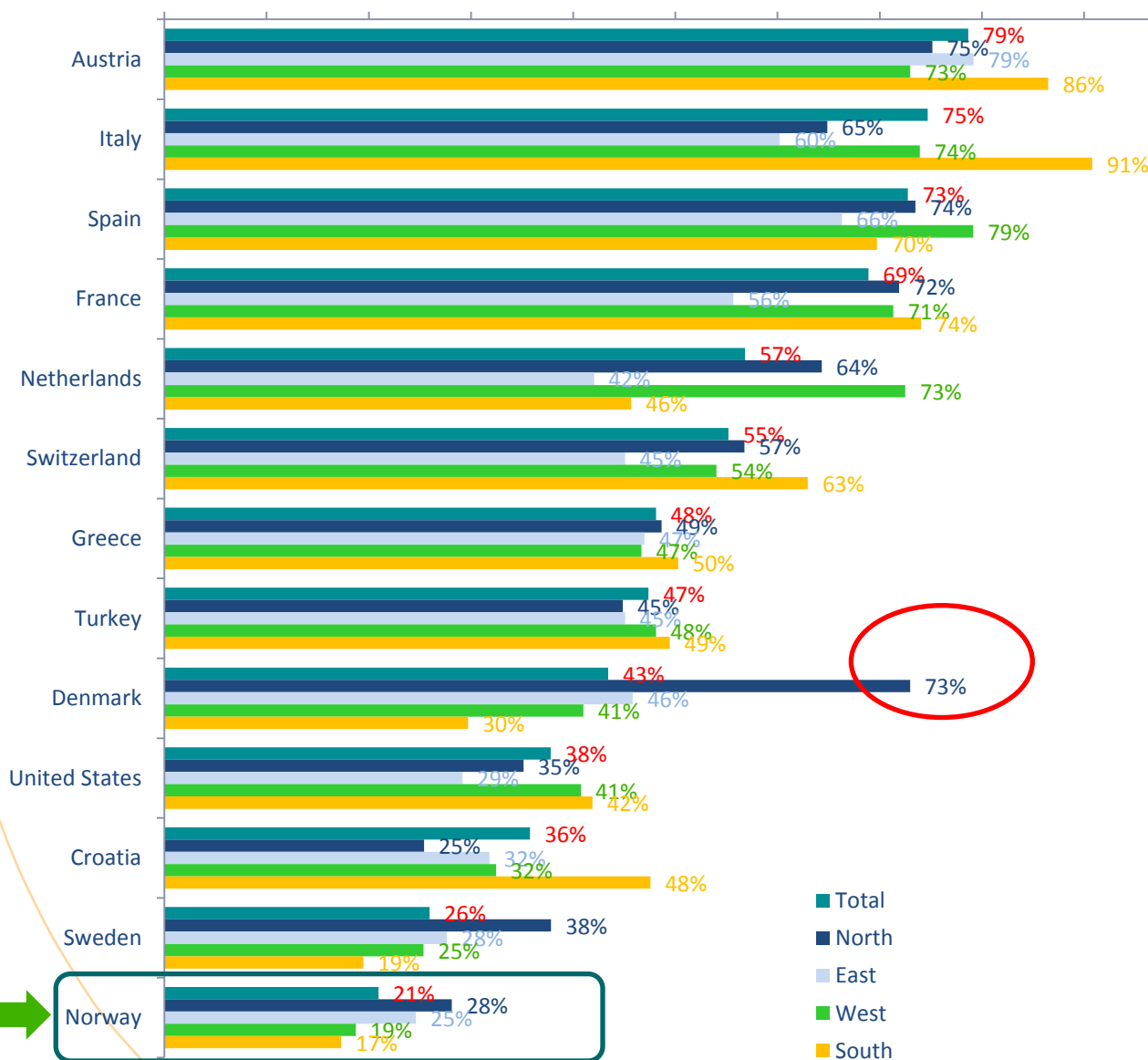


Where do Germans go on holiday?

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

Penetration = ever visited

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

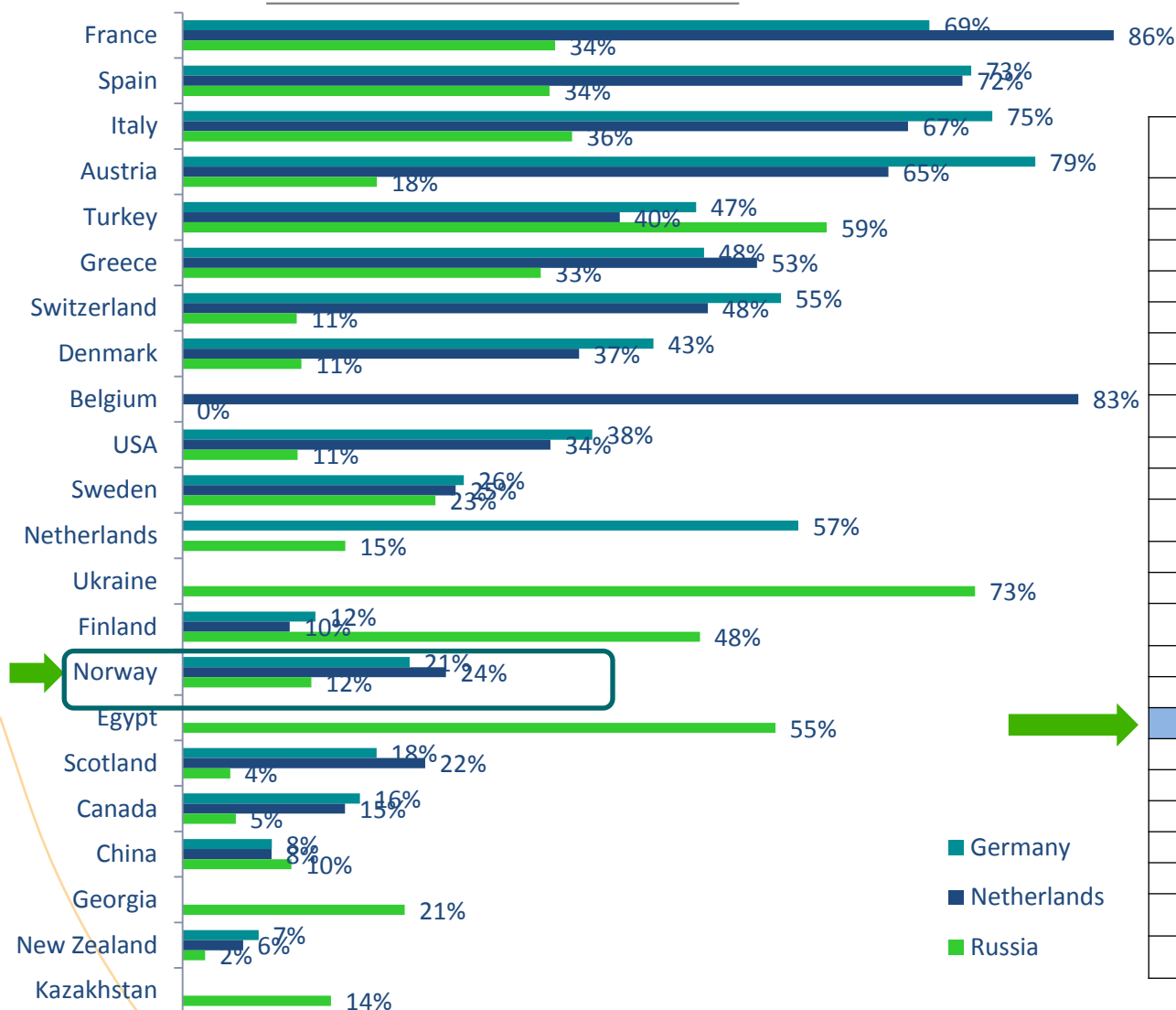


21% of the Germans have visited Norway, which is lower than for Sweden and Denmark.

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

More German and Dutch people have visited Norway than Russians

Penetration = ever visited



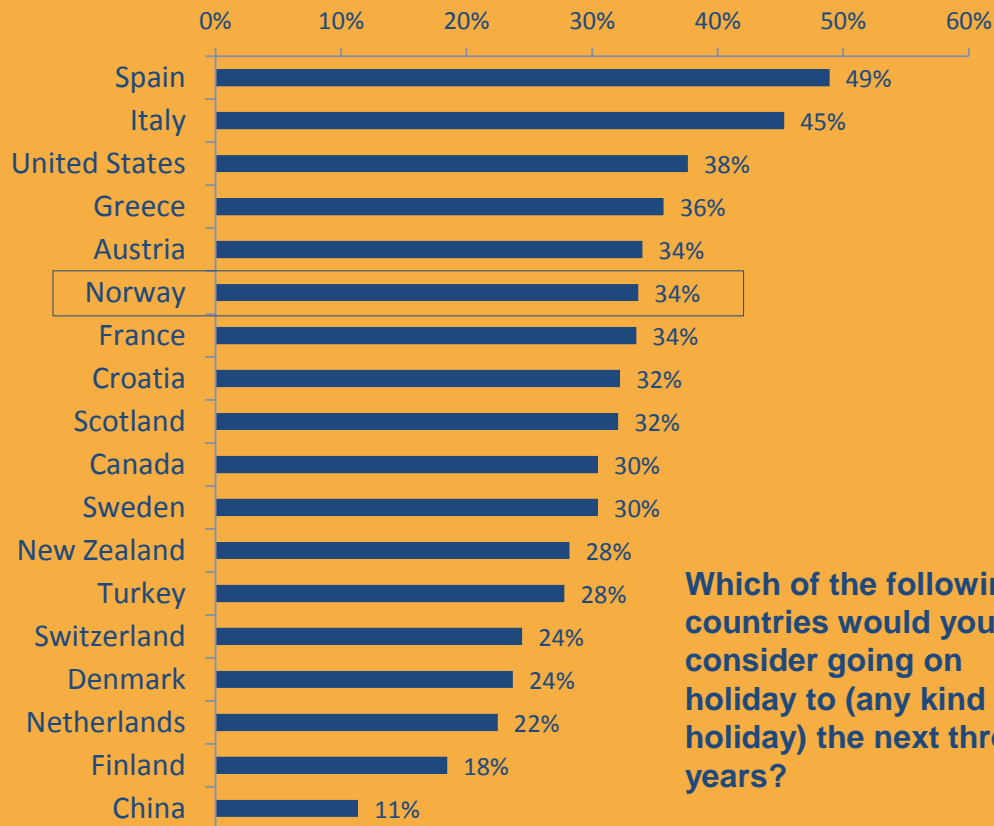
Repeat visits (twice or more...)

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

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

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

CONSIDERED DESTINATIONS

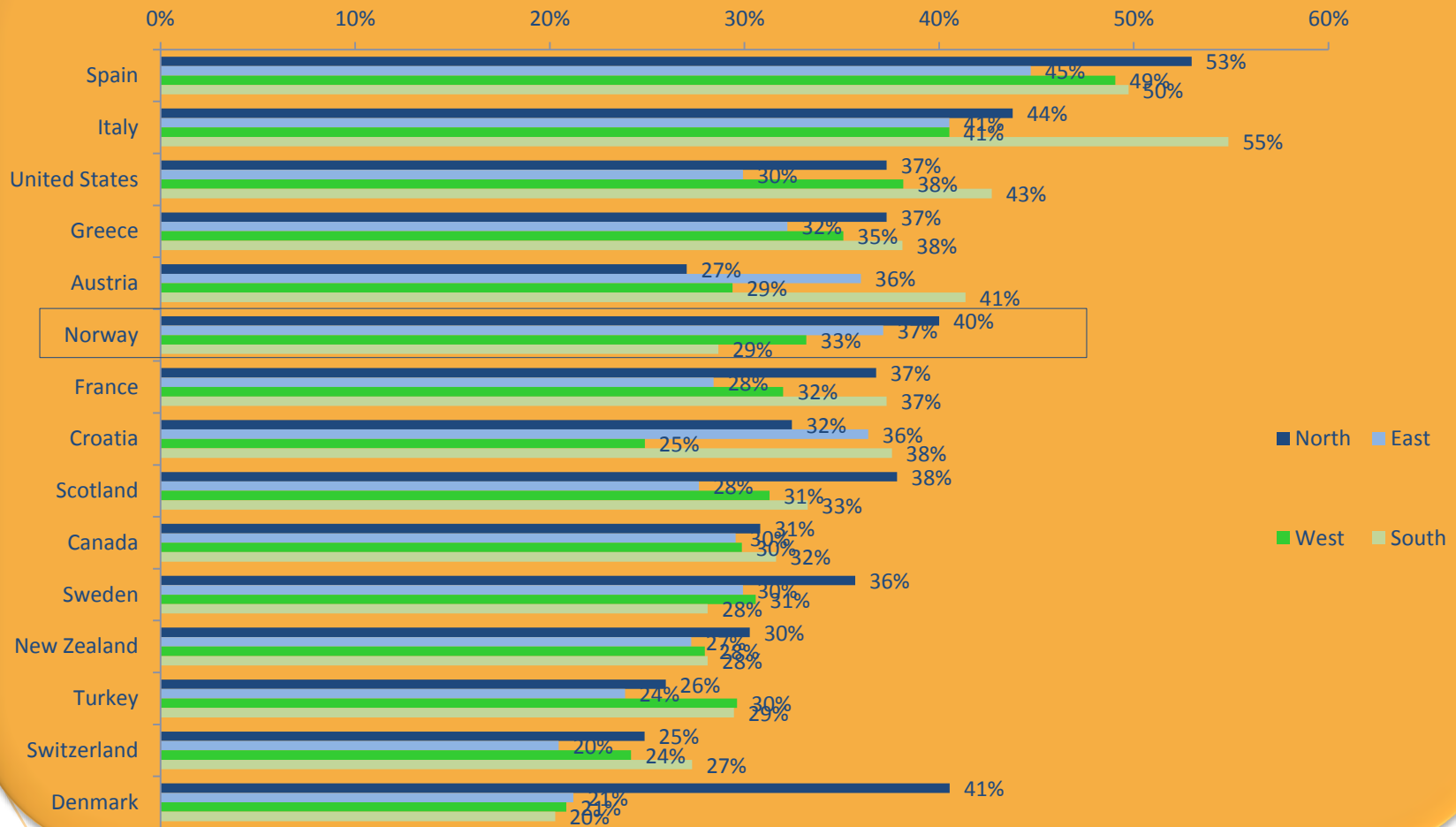


Which of the following countries would you consider going on holiday to (any kind of holiday) the next three years?

Norway is more frequently considered in the north and east of Germany

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

CONSIDERED DESTINATIONS



Share of holiday types by regions (German tourists – all holidays)

East: More hiking and holidays to experience nature – does that explain higher interest in Norway?

North: More cottage holidays.

Green = above average for Germany

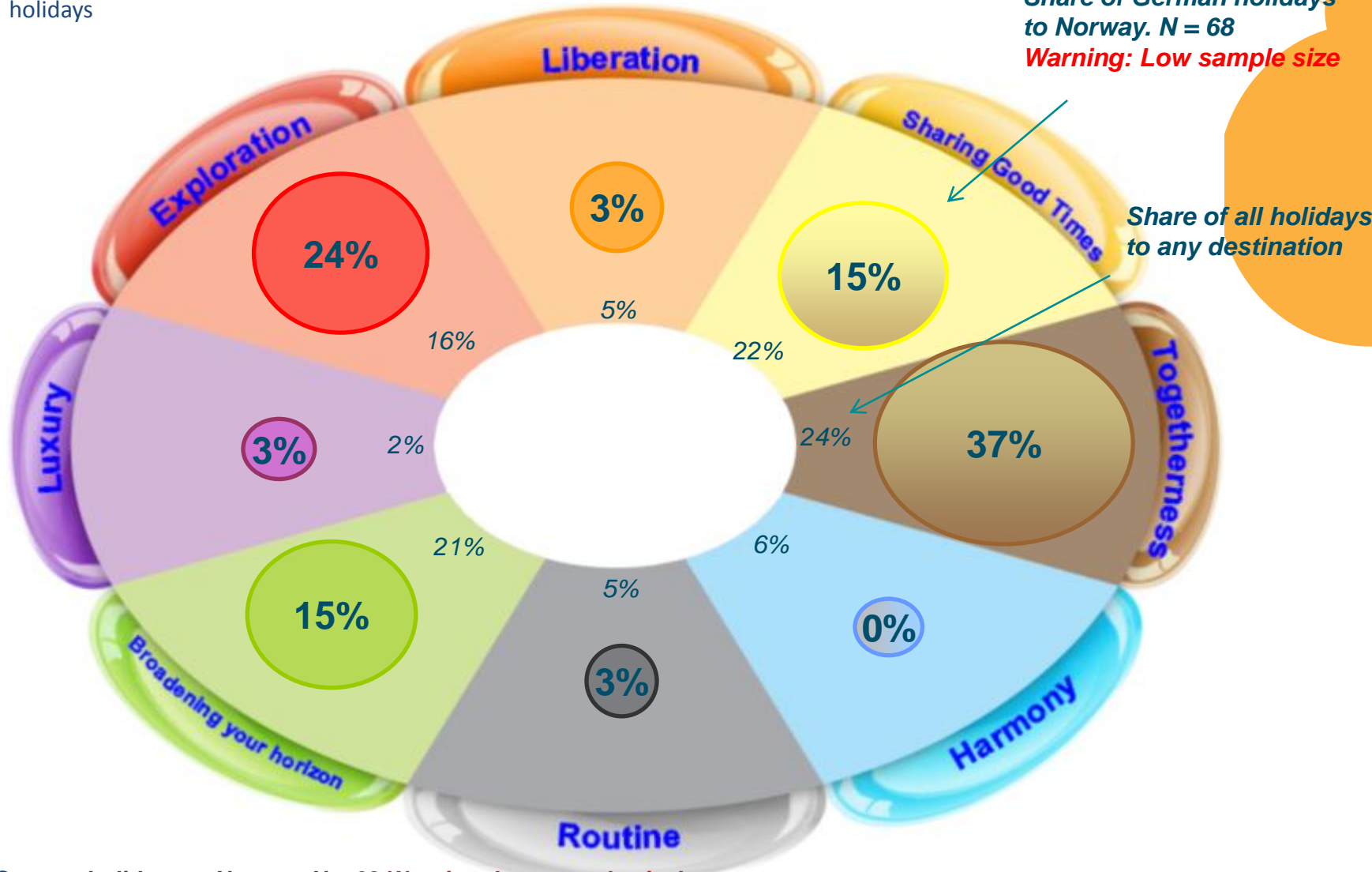
Red = below average for Germany

| | North | East | South | West |
|---|---------|---------|---------|-----------|
| | N = 468 | N = 686 | N = 948 | N = 1,068 |
| Visiting friends and relatives | 16% | 15% | 16% | 17% |
| Summer holiday/main holiday/annual leave | 10% | 14% | 12% | 12% |
| Sightseeing/roundtrip | 9% | 12% | 12% | 13% |
| Sun and beach holiday | 11% | 9% | 10% | 14% |
| Skiing holiday | 5% | 8% | 9% | 8% |
| Hiking holiday | 6% | 11% | 9% | 6% |
| Cottage holiday (hired/own/borrowed cottage/holiday home) | 15% | 7% | 6% | 7% |
| Holiday to experience nature, scenery and wildlife | 7% | 7% | 6% | 5% |
| City trip/city break | 7% | 5% | 6% | 5% |
| Short trips/extended weekend trips | 3% | 3% | 4% | 4% |
| Active holiday (golf, rafting, cycling etc.) | 4% | 2% | 3% | 3% |
| Camping holiday | 2% | 1% | 4% | 2% |
| Cruise holiday | 3% | 2% | 2% | 2% |
| Backpacking | 0% | 1% | 1% | 2% |
| Fishing holiday | 1% | 2% | 1% | 2% |

German holidays to Norway + all holidays to any destination from Germany

The size* of each segment

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



Share of German holidays to Norway. N = 68
Warning: Low sample size

Share of all holidays to any destination

Source: German holidays to Norway. N = 68 **Warning: Low sample size!**

Source: All holidays to any destination in the quantitative sample

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

WHAT

is Norway perceived
as?

DESTINATION FEATURES

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

ACTIVITIES

- Observe the beauty of nature
- Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves etc)
 - Experience the wilderness
- Do winter activities (dog-sleigh, snowmobile etc.)
 - Visit the countryside

WHY

go to Norway

EMOTIONAL BENEFITS

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

PERSONALITY

- Peaceful
- Friendly
- Authentic
- Active
- Soothing

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

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

| Emotional benefits | | |
|---|------|-------|
| (n=1154) | % | Index |
| Allow s me to discover new and interesting places | 63,7 | 105 |
| Helps me to escape from my hectic daily life | 59,2 | 115 |
| Gives me rich experiences | 55,6 | 104 |
| Allow s me to broaden my horizon | 52,3 | 100 |
| Enriches my view on the world | 51,7 | 103 |
| | | |

| Personality | | |
|-----------------|------|-------|
| (n=1154) | % | Index |
| Peaceful | 58,5 | 148 |
| Friendly | 54,2 | 95 |
| Authentic | 49,4 | 112 |
| Active | 49,2 | 113 |
| Soothing | 46,3 | 132 |
| | | |

| Destination features | | |
|---|------|-------|
| (n=1154) | % | Index |
| Has beautiful nature | 82,5 | 140 |
| Has nature that offers opportunities for discovery | 78,5 | 147 |
| Is not too warm | 78,4 | 194 |
| Has unspoiled nature | 78,3 | 180 |
| Has quiet environments | 76,4 | 159 |

| Activity | | |
|--|------|-------|
| (n=1154) | % | Index |
| Observe beauty of nature | 75,9 | 132 |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dune) | 73,4 | 189 |
| Experience the wilderness | 63,7 | 174 |
| Do winter activities (dog-sleigh, snowmobile etc) | 61,8 | 242 |
| Visit the countryside | 61,4 | 111 |

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

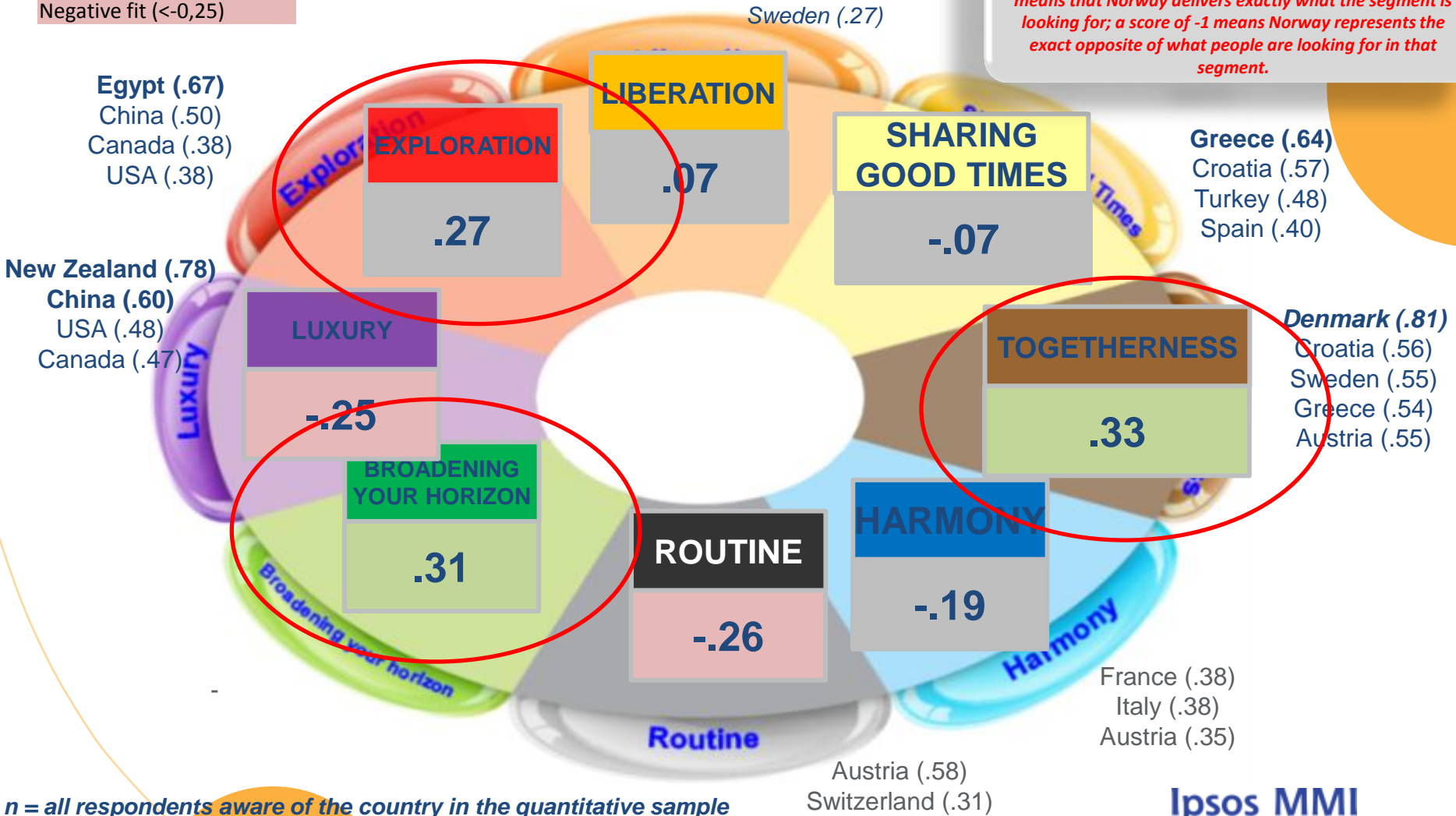
Norway has a fragmented brand footprint

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

Perceptual Fit with segments – Norway

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

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



Perceptual fit of Destinations – summary

GERMANY

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

| | Liberation | Sharing Good Times | Togetherness | Harmony | Routine | Broadening your horizon | Luxury | Exploration |
|---------------|------------|--------------------|--------------|---------|---------|-------------------------|--------|-------------|
| Austria | -0,08 | 0,22 | 0,53 | 0,35 | 0,58 | -0,01 | -0,41 | -0,56 |
| Canada | 0,06 | -0,45 | -0,40 | -0,28 | -0,25 | -0,24 | 0,47 | 0,38 |
| China | -0,19 | -0,44 | -0,75 | -0,25 | -0,24 | -0,17 | 0,60 | 0,50 |
| Croatia | 0,26 | 0,57 | 0,56 | 0,16 | -0,12 | 0,16 | -0,55 | -0,19 |
| Denmark | 0,12 | 0,27 | 0,81 | 0,21 | 0,30 | 0,27 | -0,67 | -0,39 |
| Egypt | -0,17 | -0,07 | -0,39 | -0,27 | -0,39 | 0,25 | 0,08 | 0,67 |
| Finland | 0,09 | -0,33 | -0,01 | -0,08 | 0,20 | -0,22 | 0,22 | -0,17 |
| France | -0,19 | -0,01 | -0,04 | 0,38 | -0,03 | 0,00 | 0,17 | -0,38 |
| Greece | 0,05 | 0,64 | 0,54 | 0,24 | -0,14 | 0,25 | -0,56 | -0,18 |
| Italy | 0,13 | 0,27 | 0,21 | 0,38 | 0,03 | -0,06 | -0,13 | -0,44 |
| New Zealand | 0,04 | -0,65 | -0,61 | -0,27 | -0,03 | -0,51 | 0,78 | 0,17 |
| Norway | 0,07 | -0,07 | 0,33 | -0,19 | -0,26 | 0,31 | -0,25 | 0,27 |
| Spain | 0,29 | 0,40 | 0,21 | 0,21 | 0,22 | -0,19 | -0,24 | -0,41 |
| Sweden | 0,27 | 0,08 | 0,55 | 0,08 | -0,02 | 0,13 | -0,39 | -0,13 |
| Switzerland | -0,36 | -0,24 | -0,08 | 0,22 | 0,31 | -0,07 | 0,29 | -0,40 |
| Turkey | 0,06 | 0,48 | 0,21 | 0,18 | 0,05 | -0,02 | -0,28 | -0,22 |
| United States | 0,09 | -0,27 | -0,68 | -0,26 | -0,22 | -0,21 | 0,48 | 0,38 |
| Scotland | 0,22 | -0,09 | 0,04 | -0,09 | -0,46 | 0,04 | 0,02 | 0,28 |



Perceptual fit of Norway & key competition by region – summary GERMANY

Although Norway is perceived as a Togetherness destination in the North and the West, it lags far behind Denmark. All key competitors have outspoken negative scores on Exploration across all regions.

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

| NORWAY | NORTH | WEST | EAST | SOUTH |
|-------------------------|-------|-------|-------|-------|
| Liberation | 0,28 | -0,03 | 0,16 | -0,05 |
| Sharing Good Times | -0,24 | 0,05 | -0,12 | -0,15 |
| Togetherness | 0,55 | 0,43 | 0,20 | 0,13 |
| Harmony | -0,24 | -0,16 | -0,03 | -0,18 |
| Routine | -0,26 | -0,17 | -0,12 | -0,18 |
| Broadening your horizon | 0,30 | 0,35 | 0,10 | 0,30 |
| Luxury | -0,20 | -0,34 | -0,13 | -0,09 |
| Exploration | 0,05 | 0,17 | 0,11 | 0,31 |

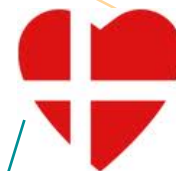
| DENMARK | NORTH | WEST | EAST | SOUTH |
|-------------------------|-------|-------|-------|-------|
| Liberation | 0,47 | 0,24 | -0,05 | -0,09 |
| Sharing Good Times | 0,00 | 0,34 | 0,26 | 0,15 |
| Togetherness | 0,81 | 0,73 | 0,52 | 0,66 |
| Harmony | 0,00 | 0,32 | 0,08 | 0,21 |
| Routine | 0,00 | 0,29 | 0,30 | 0,29 |
| Broadening your horizon | 0,14 | 0,31 | 0,23 | 0,18 |
| Luxury | -0,46 | -0,69 | -0,47 | -0,41 |
| Exploration | -0,35 | -0,43 | -0,33 | -0,35 |

| SWEDEN | NORTH | WEST | EAST | SOUTH |
|-------------------------|-------|-------|-------|-------|
| Liberation | 0,38 | 0,23 | 0,13 | 0,18 |
| Sharing Good Times | -0,25 | 0,05 | 0,31 | 0,07 |
| Togetherness | 0,39 | 0,46 | 0,62 | 0,30 |
| Harmony | 0,01 | 0,05 | 0,13 | 0,20 |
| Routine | -0,32 | 0,09 | 0,14 | 0,12 |
| Broadening your horizon | -0,04 | 0,13 | 0,22 | 0,04 |
| Luxury | 0,03 | -0,33 | -0,66 | -0,24 |
| Exploration | -0,15 | -0,20 | -0,06 | -0,24 |

| AUSTRIA | NORTH | WEST | EAST | SOUTH |
|-------------------------|-------|-------|-------|-------|
| Liberation | 0,19 | 0,04 | -0,16 | -0,12 |
| Sharing Good Times | 0,12 | 0,16 | 0,12 | 0,20 |
| Togetherness | 0,33 | 0,55 | 0,30 | 0,49 |
| Harmony | 0,25 | 0,26 | 0,21 | 0,26 |
| Routine | 0,34 | 0,55 | 0,32 | 0,66 |
| Broadening your horizon | -0,12 | -0,09 | 0,01 | -0,02 |
| Luxury | -0,34 | -0,34 | -0,17 | -0,39 |
| Exploration | -0,42 | -0,50 | -0,44 | -0,51 |

Comparison between Norway, Sweden and Denmark

Destination features and activities respondents associate with each destination



Common for all three destinations

- Has nature that offers opportunities for discovery
- Has unspoiled nature
- Allows me to broaden my horizon
- Enriches my view of the world
- Observe natural phenomenon
- Experience the wilderness
- Do winter activities
- Active
- Soothing

- Is easy to travel around
- Is easy to travel to
- Allows me to share good times with others
 - Cozy
 - Cycling
 - Sailing

- Is not too warm
- Helps me to escape from my hectic daily life
- Allows me to discover new and interesting places
- Gives me rich experiences

- Has beautiful nature
- Has quiet environments
- Authentic
- Observe beauty of nature

- Is safe
- Has friendly people
- Gives me a safe feeling
- Relaxed
- Harmonious
- Relaxation

Common for Norway and Sweden

Common for Denmark and Sweden

- Allows me to live close to nature
- Restores my sense of harmony and balance
- Taste local food and drink



5a. Key Conclusions - Across all three markets



GLOBAL CONCLUSIONS

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

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

5b. Key Conclusions - Germany



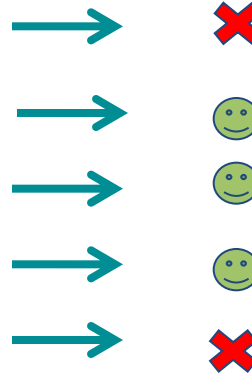
- 1. Reach minimum level of generic holiday expectations**
- 2. Positioning of Norway: Norway is mostly associated with Exploration and broadening your horizon**

1. Reach minimum level of generic expectations

What German tourists want in general:

| |
|--|
| Allows me to share good times with others |
| Helps me to escape from my hectic daily life |
| Allows me to discover new and interesting places |
| Gives me rich experiences |
| Creates precious moments of togetherness |

Emotional Benefits (for the tourist)

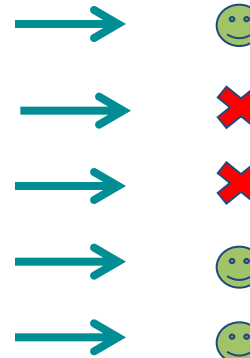


Norway does not deliver very well

Norway delivers well

Personality (for Norway)

| |
|------------|
| Friendly |
| Relaxed |
| Harmonious |
| Active |
| Peaceful |



Norway delivers pretty well on the emotional level

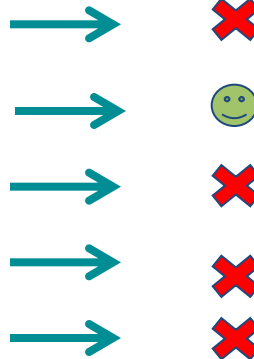
1. Reach minimum level of generic expectations

What German tourists want in general:

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

Product characteristics (for Norway)

| |
|-----------------------------------|
| Has friendly people |
| Has beautiful nature |
| Has interesting sights |
| Offers a wide range of activities |
| Is easy to travel around |

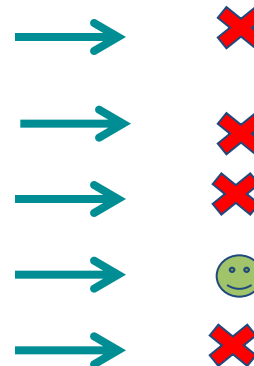


Norway does not deliver very well

Norway delivers well

Activities (in Norway)

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



Norway does not deliver on the functional level

1. Reach minimum level of generic expectations

- A social, less isolated experience
 - ⇒ 'Populate' towns and landscapes
 - ⇒ Communicate lively towns and villages
 - ⇒ Isolation as a choice, not a given

- An easy, comfortable travel experience
 - ⇒ Easy booking
 - ⇒ Visualising the holiday: knowing how to travel, where to go
 - ⇒ Make it easy to travel around
 - ⇒ Portray friendly 'Scandinavian' people

1. Reach minimum level of generic expectations

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

2. Positioning of Norway: Norway is mostly associated with Exploration and Broadening your horizon

Exploration

- Addresses 16% (the segment volume of Exploration) of all German holidays abroad
 - ⇒ 14% in North Germany and 19% in East Germany
- Already the most important reason why Germans travel to Norway
- Decent perceptual fit
- Competition is relatively weak
 - ⇒ China, Canada, New Zealand and Scotland are all associated with this area, but none of them as a strong perceptual or behavioural leader
 - ⇒ Proximity is a key advantage in relation to destinations further afield

Broadening your Horizon

- Addresses 21% (the segment volume of Exploration) of all German holidays abroad
 - ⇒ 19% in North Germany and 23% in East Germany
- One of the biggest segment overall in Germany
- Decent perceptual fit
- No country “own” this motivational segment

Appendix

- A) Description of each segment
- B) Competing destinations – common ground analysis
- C) Overall positioning and targeting – holiday types

A) Description of each segment



Liberation

Description

LIBERATION

- Active and fresh



Segment
size 5%

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, relaxed and fresh.

Most important differentiators:

- Personality:
 - Fresh
 - Active
 - Friendly
 - Peaceful
 - Relaxed
- Emotional benefits:
 - Helps me to enjoy life to the fullest
 - Makes me feel full of energy
 - Makes me feel completely liberated
 - Allows me to come to my senses
- Destination characteristics:
 - Allows me to be physical active
 - Has beautiful nature
 - Has friendly people

• Activities:

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

• Type of holiday:

- Skiing holiday
- Hiking holiday

LIBERATION

- Active and fresh



Who:

- A marginal female dominance, 40-49 years is the most dominant age group. The age group 30-59 years constitutes 79% of the sample.
- They travel with their spouse/partner (57%) and/or friends (36%).
- Educational level: Secondary vocational (35%), Higher education (32%), Incomplete higher (31%).
- Marital status: Married with children (39%), Single without children (27%), Partner without children (18%).

How do they travel:

- Transport to destination dominated by car
- Transport during stay dominated by own car
- Most common accommodation:
 - Hotel (medium standard)
 - Rented or borrowed cabin / holiday home / flat
- 79% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (52%) or their friends (34%)
- Information sources:
 - Internet in general (61%)
 - Websites about destination (36%)
 - Advice from friends (31%)
 - Hotel/accommodation websites (28%)
- Planning horizon:
 - 18% decided on the holiday 6-12 months before departure
 - 18% decided on the holiday 4-6 months before departure

Sharing Good Times

Description

Sharing Good Times

- Sociable, outgoing and friendly



Segment
size 22%

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
- Emotional benefits:
 - Allows me to share good times with others
 - Helps me to meet new people
 - Allows me to immerse myself in the local culture
- 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:

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

• Type of holiday:

- Visiting friends and relatives
- Summer holiday
- Skiing holiday

Sharing Good Times

- Sociable, outgoing and friendly



Who:

- A marginal female dominance, 40-59 years is the most dominant age group, constituting 56% of the sample.
- They travel with their spouse/partner (61%) and/or friends (25%).
- Educational level: Secondary vocational (36%), Higher education (28%), Incomplete higher (27%).
- 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 dominated by car (46%) and scheduled flight (29%)
- Transport during stay dominated by own car (39%), bus (26%) or rented car (17%)
- Most common accommodation:
 - Hotel (medium standard)
 - Rented or borrowed cabin / holiday home / flat
- 77% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (52%), no one except themselves (20%) or their friends (21%)

• Information sources before travelling:

- Internet in general (61%)
- Websites about destination (41%)
- Hotel/accommodation websites (35%)
- Sights/attractions' websites (26%)

• Planning horizon:

- 32% decided on the holiday up to 3 months before departure
- 24% decided on the holiday 4-6 months before departure

Togetherness

Description

TOGETHERNESS

- Relaxed, friendly, soothing, cozy and harmonious



Segment
size 24%

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:
 - Soothing
 - Peaceful
 - Cozy
 - Harmonious
 - Relaxed
- Emotional benefits:
 - Allows me to intensify the relationships with my loved one(s)
 - Creates precious moments of togetherness
 - Allows me to share good times with others
- Destination characteristics:
 - Has friendly people
 - Is safe
 - Has beautiful nature
 - Is easy to travel to
 - Is easy to travel around
- Activities:
 - Relaxation
 - Sunbathing and swimming
 - Taste local food and drink
 - Observe the beauty of nature
- Type of holiday:
 - Sun and beach holiday
 - Cottage holiday
 - Summer holiday (annual holiday)
 - Visiting friends and relatives

TOGETHERNESS

- Relaxed, friendly, soothing, cozy and harmonious



Who:

- A marginal female dominance, 40-49 years is the most dominant age group. The age group 30-49 years constitutes 58% of the sample.
- They travel with their spouse/partner (75%) and/or children (47%).
- Educational level: Higher education (35%), Incomplete higher (29%), Secondary vocational (27%).
- Marital status: Married with children (40%), Single without children, (16%), Partner without children (16%), Married without children (14%).

How do they travel:

- Transport to destination dominated by car (67%) and scheduled flight (16%)
- Transport during stay dominated by own car (61%), bus (16%) or rented car (10%)
- Most common accommodation:
 - Rented or borrowed cabin / holiday home / flat (31%)
 - Hotel (medium standard) (27%)
- 85% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (64%) or their friends (20%)

• Information sources before travelling:

- Internet in general (62%)
- Websites about destination (47%)
- Hotel/accommodation websites (41%)
- Sights/attractions' websites (23%)
- Advice from friends and family (23%)

• Planning horizon:

- 16% decided on the holiday 6-12 months before departure
- 24% decided on the holiday 4-6 months before departure
- 19% decided on the holiday up to 3 months before departure

Harmony

Description

Harmony

- Cultivated, contemporary and caring

Segment
size 6%



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:
 - Cultivated
 - Contemporary
 - Relaxed
 - Friendly
 - Caring
- Emotional benefits:
 - Allows me to pamper myself
 - Give me a sense of being well cared for
 - Gives me a safe feeling
 - Allows me to let go without restrictions
- Destination characteristics:
 - Is safe
 - Has good local cuisine
 - Offers a wide range of possible activities
 - Has good service
 - Has friendly people

• Activities:

- Relaxation
- Taste local food and drink
- Shopping
- Visit restaurants
- Get pampered

• Type of holiday:

- Sun and beach holiday
- Visiting friends and relatives
- Summer holiday/annual leave

Harmony

- Cultivated, contemporary and caring



Who:

- A marginal female dominance, 40-59 years is the most dominant age group and constitutes 58% of the sample.
- They travel with their spouse/partner (60%) and/or children aged 7-14 (15%).
- Educational level: Secondary vocational (39%), Higher education (39%), Incomplete higher (19%).
- Marital status: Married with children (37%), Single without children (28%), Married without children (12%), Cohabitant/partner without children (10%).

How do they travel:

- Transport to destination dominated by car (51%), scheduled flight (29%) and charter flight (19%)
- Transport during stay dominated by own car (39%), bus (21%) or rented car (21%)
- Most common accommodation:
 - Hotel (medium standard) (32%)
 - Hotel (high standard) (27%)
- 82% of them organised the trip themselves and travelled independently
- Their choice of holiday/destination is influenced by their partner (58%), no one except themselves (22%), their friends (12%) or children aged 7-14 (10%)

• Information sources before travelling:

- Internet in general (62%)
- Websites about destination (45%)
- Hotel/accommodation websites (44%)
- Sights/attractions' websites (24%)

• Planning horizon:

- 22% decided on the holiday 4-6 months before departure
- 16% decided on the holiday up to 3 months before departure
- 18% decided on the holiday up to 2 months before departure



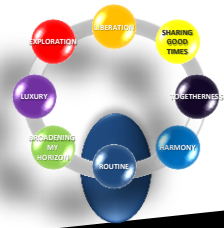
Routine

Description

Routine

- Predictable, practical and structured

Segment
size 5%



Segment core:

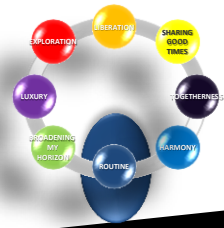
- The basic motivation for going on holidays is to have things much as they are at home. They bring their normal world into the new world. This could be a cottage holiday or visiting friends but also sun and beach.
- No surprises, practical and structured holidays, so that they can relax and recharge. 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
- Emotional benefits:
 - Avoids too many surprises
 - Allows me to keep everything under control
 - Gives me a safe feeling
- Destination characteristics:
 - Is easy to travel to
 - Has friendly people
 - Is safe
 - Has beautiful nature
 - Has good medical care
- Activities:
 - Visit restaurants
 - Taste local food and drink
 - Relaxation
 - Observe the beauty of nature
 - Visit cities
- Type of holiday:
 - Visiting friends and relatives
 - Sightseeing/roundtrip
 - Summer holiday/main annual leave
 - Cottage 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 (58%), charter flight (16%) and scheduled flight (15%)
 - Transport during stay dominated by own car (52%) or rented car (17%)
 - Most common accommodation:
 - Hotel (medium standard) (26%)
 - Rented or borrowed cabin / holiday home / flat (19%)
 - 68% of them organised the holiday themselves and travelled independently
 - 22% travelled in a group with an organised tour.
 - Their choice of holiday/destination is influenced by their partner (54%), parents or other relatives (17%) or their friends (25%)
- Information sources before travelling:
 - Internet in general (69%)
 - Hotel/accommodation websites (40%)
 - Websites about destination (39%)
 - Sights/attractions' websites (31%)
 - Advice from friends and family (30%)
 - Planning horizon:
 - 24% decided on the holiday 1-3 weeks before departure
 - 17% decided on the holiday up to 1 month before departure

Broadening your Horizon

Description

Broadening your Horizon

- Friendly, authentic, open-minded and cultivated

Segment
size 21%



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:
 - Open-minded
 - Authentic
- 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 of the world
 - Gives me rich experiences
- Destination characteristics:
 - Has interesting sights
 - Has friendly people
 - Has interesting culture and art
 - Has rich cultural heritage
- Activities:
 - Taste local food and drink
 - Visit historical buildings/sites
 - Visit cities
 - Discover local culture and lifestyle
 - Experience local architecture
 - Discover local history and legends
 - Visit museums
 - Sightseeing
 - Visit parks and gardens
- Type of holiday:
 - Sightseeing/roundtrip
 - City trip/city break

Broadening your Horizon

- Authentic, open-minded and cultivated



Who:

- 40-59 years is the most dominant age group, constituting 58% of the sample.
- They travel with their spouse/partner (63%) and/or friends (16%).
- Educational level: Higher education (37%), Incomplete higher (30%), Secondary vocational (28%).
- Marital status: Married with children (34%), Single without children (24%), Married without children (18%).

How do they travel:

- Transport to destination dominated by car (38%) and scheduled flight (37%)
 - Transport during stay dominated by bus (33%), own car (29%), or rented car (19%)
 - Most common accommodation:
 - Hotel (medium standard) (35%)
 - Hotel (high standard) (20%)
 - Rented or borrowed cabin / holiday home / flat (18%)
 - 71% of them organised the trip themselves and travelled independently
 - 18% travelled in a group with an organised tour.
 - Their choice of holiday/destination is influenced by their partner (58%), no one except themselves (18%) or their friends (21%)
- Information sources before travelling:
 - Internet in general (71%)
 - Websites about destination (54%)
 - Hotel/accommodation websites (45%)
 - Sights/attractions' websites (38%)
 - Planning horizon:
 - 23% decided on the holiday 4-6 months before departure
 - 15% decided on the holiday up to 3 months before departure
 - 19% decided on the holiday up to 2 months before departure



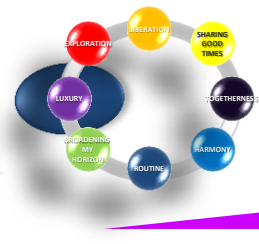
Luxury

Description

Luxury

- Classy, extravagant, superior and luxurious

Segment
size 2%



Segment core:

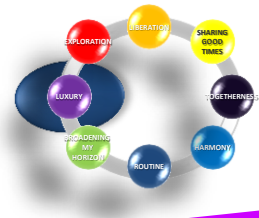
- The basic motivation for going on holidays is to IMPRESS OTHERS, to stand out from the crowd.
- This kind of holiday abroad serves as proof of one's superiority, high social class, success, stability.
- Reasons for going on holidays abroad: to indulge in higher living standards and comfort, to get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

Most important differentiators:

- Personality:
 - Superior
 - Extravagant
 - Classy
 - Luxurious
 - Cozy
 - Peaceful
- Emotional benefits:
 - Allows me to indulge in a bit of luxury
 - Makes me feel on top of the world
 - Allows me to show my superior lifestyle
 - Allows me to let go without restrictions
 - Makes me feel sophisticated
 - Makes me stand out from the crowd
 - Makes me feel special
- Destination characteristics:
 - Has beautiful nature
 - Has a variety of different restaurant offers
 - Has good shopping
 - Has romantic spots
- Activities:
 - Has lots of organised trips and excursions
 - Allows me to grow personally
 - Is a high-class destination
 - Is not for just anybody, is exclusive
 - Is expensive
 - Has a lot of bars
 - Has classy restaurants
- Type of holiday:
 - Summer holiday/ annual leave

Luxury

- Classy, extravagant, superior and luxurious



Who:

- A marginal male dominance, 30-39 years is the most dominant age group. The age group 30-49 years constitutes 52% of the sample.
- They travel with their spouse/partner (52%) and/or friends (28%).
- Educational level: Higher education (36%), Secondary vocational (32%), Incomplete higher (24%).
- Marital status: Married with children (32%), Single without children (28%), Married without children (20%).

How do they travel:

- Transport to destination dominated by car (36%) and scheduled flight (32%)
 - Transport during stay dominated by rented car (36%) bus (20%), plane (20%) or own car (16%)
 - Most common accommodation:
 - Hotel (high standard) (32%)
 - Hotel (medium standard) (24%)
 - 52% of them organised the trip themselves and travelled independently
 - 24% travelled in a group with an organised tour
 - Their choice of holiday/destination is influenced by their partner (56%), no one except themselves (16%), parents/other relatives (16%) or their friends (16%)
- Information sources before travelling:
 - Internet in general (68%)
 - Hotel/accommodation websites (40%)
 - Websites about destination (36%)
 - Websites of carriers incl. airlines etc. (32%)
 - Planning horizon:
 - 20% decided on the holiday 1-3 weeks before departure
 - 24% decided on the holiday up to 2 months before departure
 - 20% decided on the holiday 4-6 months before departure



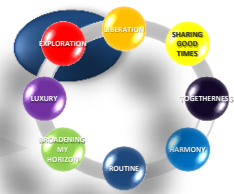
Exploration

Description

Exploration

- Adventurous, explorative, active and unique

Segment
size 16%



Segment core:

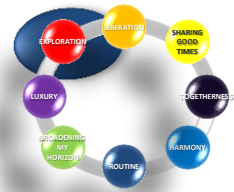
- The basic motivation for going on holidays is to GET RICH EXPERIENCES, to refresh body and mind, rejuvenate and satisfy a hunger for unique impressions. Role of holidays abroad: to present maximum opportunities for exploration of the self and the world, and to maximise experience.
- Reasons for going 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:
 - Adventurous
 - Explorative
 - Unique
 - Active
- Emotional benefits:
 - Gives me rich experiences
 - Allows me to discover new and interesting places
 - Allows me to broaden my horizon
 - Enriches my view of the world
- Destination characteristics:
 - Allows me to have unique experiences
 - Has beautiful nature
 - Has friendly people
 - Has nature that offers opportunities for discovery
 - Has interesting sights
- Activities:
 - Observe beauty of nature
 - Taste local food and drink
 - Discover local culture and lifestyle
 - Visit restaurants
 - Relaxation
 - Visit cities
- Type of holiday:
 - Sightseeing/roundtrip
 - Summer holiday/main holiday/annual leave
 - Holiday to experience nature, scenery and wildlife
 - Hiking holiday

Exploration

- Adventurous, explorative, active and unique



Who:

- A male dominance, 30-49 years is the most dominant age group and constitutes 51% of the sample.
- They travel with their spouse/partner (59%) and/or friends (24%).
- Educational level: Higher education (34%), Secondary vocational (31%), Incomplete higher (29%).
- Marital Status: Married with children (30%), Single without children (29%), Cohabitant/partner without children (18%), Married without children (15%).

How do they travel:

- Transport to destination dominated by car (45%) and scheduled flight (34%)
 - Transport during stay dominated by own car (32%), bus (25%) or rented car (22%)
 - Most common accommodation:
 - Hotel (medium standard) (28%)
 - Rented or borrowed cabin / holiday home / flat (22%)
 - Hotel (high standard) (19%)
 - 72% of them organised the trip themselves and travelled independently
 - 18% travelled in a group with an organised tour
 - Their choice of holiday/destination is influenced by their partner (52%), no one except themselves (20%) or their friends (21%)
- Information sources before travelling:
 - Internet in general (75%)
 - Websites about destination (55%)
 - Hotel/accommodation websites (38%)
 - Sights/attractions' websites (35%)
 - Planning horizon:
 - 18% decided on the holiday up to 2 months before departure
 - 19% decided on the holiday up to 3 months before departure
 - 27% decided on the holiday 4-6 months before departure
 - 14% decided on the holiday up to 6-12 months before departure

B) Competing destinations

Common ground analysis

How to read the scorecards

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

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

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

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

Comparison Austria vs. Norway (German base)

| | Destination features |
|-------------------|--|
| Unique to Norway | <ul style="list-style-type: none"> Has beautiful nature Is not too warm Has nature that offers opportunities for discovery Has unspoiled nature Has quiet environments |
| Common ground | <ul style="list-style-type: none"> Is safe Has good medical care |
| Unique to Austria | <ul style="list-style-type: none"> Has attractive mountain areas Has few language barriers Is easy to travel to Has good local cuisine Has good service |
| | Emotional benefits |
| Unique to Norway | <ul style="list-style-type: none"> Helps me to escape from my hectic daily life Restores my sense of harmony and balance Makes me feel completely liberated Allows me to come to my senses |
| Common ground | <ul style="list-style-type: none"> Gives me a safe feeling |
| Unique to Austria | <ul style="list-style-type: none"> Gives me a sense of being well cared for Avoids too many surprises Makes me feel full of energy Allows me to spoil my loved ones |

| | Activities |
|-------------------|---|
| Unique to Norway | <ul style="list-style-type: none"> Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc.) Experience wilderness |
| Common ground | <ul style="list-style-type: none"> Experience mountains Do winter activities (dog-sleigh, snowmobile etc.) Alpine skiing/snowboarding Hiking (more than two hours) Rafting Cross-country skiing |
| Unique to Austria | <ul style="list-style-type: none"> Hiking (less than two hours) Cycling Visit spa resorts |
| | Personality |
| Unique to Norway | <ul style="list-style-type: none"> Authentic Soothing Unique Adventurous Relaxed |
| Common ground | <ul style="list-style-type: none"> Harmonious Peaceful Active |
| Unique to Austria | <ul style="list-style-type: none"> Cozy Cultivated Sociable |

Scorecard – Austria German base

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

| Destination features | | |
|---|------|-------|
| (n=323) | % | Index |
| Has attractive mountain areas | 89,2 | 148 |
| Has few language barriers | 83,9 | 196 |
| Is easy to travel to | 83,6 | 148 |
| Has a variety of accommodation offers | 83,0 | 107 |
| Has good medical care | 81,4 | 147 |
| | | |
| <u>Is not too different from home</u> | 58,8 | 268 |
| <u>Is w ell organised</u> | 71,5 | 131 |
| <u>Has good local cuisine</u> | 78,9 | 130 |
| <u>Has classy restaurants</u> | 70,6 | 130 |
| <u>Is safe</u> | 78,6 | 129 |
| <u>Has good service</u> | 72,1 | 127 |
| <u>Is not too w arm</u> | 64,7 | 123 |
| <u>Has environmentally friendly offers</u> | 49,2 | 123 |
| <u>Has a variety of different restaurant offers</u> | 75,9 | 121 |

| Personality | | |
|--------------------|------|-------|
| (n=323) | % | Index |
| Cozy | 61,3 | 151 |
| Friendly | 60,7 | 102 |
| Cultivated | 56,3 | 124 |
| Peaceful | 54,8 | 132 |
| Active | 52,6 | 116 |
| | | |
| <u>Predictable</u> | 35,9 | 175 |
| <u>Practical</u> | 40,6 | 146 |
| <u>Structured</u> | 43,7 | 142 |
| <u>Caring</u> | 34,4 | 125 |

| Activity | | |
|---|------|-------|
| (n=323) | % | Index |
| Experience mountains | 83,6 | 170 |
| Alpine skiing/snowboarding | 77,1 | 232 |
| Hiking (more than two hours) | 76,8 | 143 |
| Hiking (less than two hours) | 73,1 | 126 |
| Visit restaurants | 69,0 | 102 |
| | | |
| <u>Visit spa resorts</u> | 55,4 | 213 |
| <u>Cross-country skiing</u> | 65,6 | 209 |
| <u>Attend theatre, ballet, opera performances</u> | 49,2 | 172 |
| <u>Extreme sport activities (mountain climbing, kiting, paragliding etc.)</u> | 62,8 | 172 |
| <u>Do w inter activities (dog-sleigh, snow mobile etc.)</u> | 50,8 | 164 |
| <u>Rafting</u> | 49,2 | 151 |
| <u>Kayaking/canoeing</u> | 43,0 | 128 |
| <u>Cycling</u> | 56,3 | 128 |
| <u>Workout in gym/fitness centre</u> | 26,6 | 126 |
| <u>Visit or take part in sports events</u> | 34,1 | 122 |
| <u>Attend concerts/festivals</u> | 37,5 | 122 |

Comparison Canada vs. Norway (German base)

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

| | Emotional benefits |
|------------------|---|
| Unique to Norway | Allows me to let go without restrictions Allows me to come to my senses Helps me to escape from my hectic daily life Restores my sense of harmony and balance Gives me a safe feeling |
| Common ground | Makes me feel completely liberated Makes me stand out from the crowd |
| Unique to Canada | Makes me feel on top of the world Allows me to show off my superior lifestyle Shows that I am successful in life Allows me to impress other people |

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

| | Personality |
|------------------|--|
| Unique to Norway | Authentic Soothing Unique Active Fresh |
| Common ground | Peaceful Explorative Adventurous |
| Unique to Canada | Daring Generous Extravagant |

| Personality | | |
|--------------------|------|-------|
| (n=143) | % | Index |
| Friendly | 45,5 | 83 |
| Authentic | 44,8 | 106 |
| Explorative | 44,8 | 132 |
| Adventurous | 44,1 | 124 |
| Active | 42,7 | 102 |
| | | |
| <u>Extravagant</u> | 19,6 | 138 |
| <u>Indulgent</u> | 14,7 | 132 |
| <u>Daring</u> | 25,2 | 128 |
| <u>Superior</u> | 14,0 | 127 |
| <u>Generous</u> | 23,8 | 120 |

| Activity | | |
|---|------|-------|
| (n=143) | % | Index |
| Experience wildlife | 58,0 | 205 |
| Observe beauty of nature | 57,3 | 110 |
| Experience the wilderness | 57,3 | 173 |
| Visit national parks | 55,9 | 170 |
| Experience mountains | 55,2 | 150 |
| | | |
| <u>Do winter activities (dog-sleigh, snow mobile etc.)</u> | 49,0 | 212 |
| <u>Kayaking/canoeing</u> | 45,5 | 181 |
| <u>Alpine skiing/snow boarding</u> | 43,4 | 174 |
| <u>Freshwater fishing</u> | 38,5 | 167 |
| <u>Rafting</u> | 40,6 | 166 |
| <u>Extreme sport activities (mountain climbing, kiting, paragliding etc.)</u> | 41,3 | 151 |
| <u>Saltwater fishing</u> | 30,1 | 126 |

| Emotional benefits | | |
|---|------|-------|
| (n=143) | % | Index |
| Allow s me to broaden my know ledge | 51,7 | 101 |
| Allow s me to discover new and interesting places | 51,7 | 90 |
| Helps me to escape from my hectic daily life | 49,0 | 101 |
| Allow s me to broaden my horizon | 49,0 | 99 |
| Gives me rich experiences | 48,3 | 95 |
| | | |
| <u>Show s that I am successful in life</u> | 20,3 | 165 |
| <u>Makes me feel completely liberated</u> | 42,0 | 145 |
| <u>Makes me stand out from the crow d</u> | 20,3 | 138 |
| <u>Allow s me to impress other people</u> | 15,4 | 137 |
| <u>Allow s me to show my superior lifestyle</u> | 12,6 | 134 |

| Destination features | | |
|---|------|-------|
| (n=143) | % | Index |
| Has nature that offers opportunities for discovery | 67,1 | 127 |
| Allows me to live close to nature | 65,0 | 144 |
| Has beautiful nature | 63,6 | 109 |
| Has attractive mountain areas | 62,2 | 136 |
| Offers a wide range of possible activities | 61,5 | 106 |
| Allow s me to have unique experiences | 61,5 | 111 |
| | | |
| <u>Has no kids</u> | 8,4 | 183 |
| <u>Is not for just anybody, is exclusive</u> | 26,6 | 167 |
| <u>Is not ruined by tourism</u> | 53,1 | 153 |
| <u>Is a high-class destination</u> | 21,7 | 142 |
| <u>Is not too warm</u> | 56,6 | 142 |
| <u>Has environmentally friendly offers</u> | 41,3 | 135 |
| <u>Has unspoiled nature</u> | 58,0 | 135 |
| <u>Is well organised</u> | 54,5 | 132 |
| <u>Has good medical care</u> | 53,8 | 128 |
| <u>Has few language barriers</u> | 41,3 | 127 |
| <u>Is safe</u> | 57,3 | 124 |
| <u>Has quiet environments</u> | 58,0 | 122 |

Comparison Denmark vs. Norway (German base)

| | Destination features |
|-------------------|--|
| Unique to Norway | <ul style="list-style-type: none"> Has beautiful nature Has unspoiled nature Has nature that offers opportunities for discovery Is not ruined by tourism |
| Common ground | <ul style="list-style-type: none"> Is not too warm Is safe Has good medical care |
| Unique to Denmark | <ul style="list-style-type: none"> Is easy to travel to Is easy to travel around Has activities for kids Is well organised |

| | Emotional benefits |
|-------------------|---|
| Unique to Norway | Makes me stand out from the crowd |
| Common ground | <ul style="list-style-type: none"> Helps me to escape from my hectic daily life Restores my sense of harmony and balance Gives me a safe feeling Makes me feel completely liberated Allows me to come to my senses |
| Unique to Denmark | <ul style="list-style-type: none"> Allows me to share good times with others Allows me to spoil my loved ones Makes me feel full of energy Avoids too many surprises |

| | Activities |
|-------------------|---|
| Unique to Norway | <ul style="list-style-type: none"> Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc.) Experience wilderness Hiking (more than two hours) Do winter activities (dog-sleigh, snowmobile etc.) |
| Common ground | <ul style="list-style-type: none"> Saltwater fishing Freshwater fishing |
| Unique to Denmark | <ul style="list-style-type: none"> Relaxation Cycling Visit the countryside Sailing Play with the children |

| | Personality |
|-------------------|---|
| Unique to Norway | <ul style="list-style-type: none"> Authentic Active Adventurous Unique Explorative |
| Common ground | <ul style="list-style-type: none"> Peaceful Soothing Relaxed Fresh Harmonious |
| Unique to Denmark | <ul style="list-style-type: none"> Friendly Cozy Structured Practical |

Scorecard – Denmark German base

| Emotional benefits | | |
|---|------|-------|
| (n=230) | % | Index |
| Helps me to escape from my hectic daily life | 60,4 | 123 |
| Allow s me to share good times w ith others | 58,3 | 116 |
| Gives me a safe feeling | 53,9 | 160 |
| Allow s me to discover new and interesting places | 51,7 | 89 |
| Gives me rich experiences | 47,0 | 92 |
| | | |
| <u>Avoids too many surprises</u> | 33,0 | 161 |
| <u>Restores my sense of harmony and balance</u> | 46,1 | 131 |
| <u>Allow s me to spoil my loved ones</u> | 37,4 | 121 |

| Destination features | | |
|--|------|-------|
| (n=230) | % | Index |
| Has friendly people | 81,3 | 118 |
| Is not too warm | 80,9 | 192 |
| Is easy to travel around | 79,1 | 138 |
| Is easy to travel to | 78,3 | 173 |
| Is safe | 75,2 | 154 |
| | | |
| <u>Is not too different from home</u> | 31,7 | 180 |
| <u>Has good medical care</u> | 71,7 | 162 |
| <u>Has environmentally friendly offers</u> | 51,7 | 161 |
| <u>Is expensive</u> | 51,3 | 155 |
| <u>Has quiet environments</u> | 70,4 | 141 |
| <u>Has activities for kids</u> | 61,7 | 139 |
| <u>Is well organised</u> | 60,0 | 138 |
| <u>Has good beaches</u> | 59,6 | 130 |
| <u>Attracts kids the same age as mine</u> | 30,4 | 128 |
| <u>Allow s me to live close to nature</u> | 61,3 | 128 |
| <u>Has few language barriers</u> | 42,6 | 124 |

| Personality | | |
|--------------------|------|-------|
| (n=230) | % | Index |
| Friendly | 63,9 | 113 |
| Peaceful | 63,0 | 161 |
| Relaxed | 57,8 | 146 |
| Cozy | 54,3 | 142 |
| Harmonious | 49,6 | 136 |
| | | |
| <u>Fresh</u> | 41,7 | 144 |
| <u>Practical</u> | 37,8 | 144 |
| <u>Soothing</u> | 48,7 | 140 |
| <u>Structured</u> | 39,1 | 134 |
| <u>Predictable</u> | 24,3 | 125 |
| <u>Open-minded</u> | 34,8 | 123 |

| Activity | | |
|--------------------------------|------|-------|
| (n=230) | % | Index |
| Relaxation | 67,4 | 154 |
| Cycling | 66,5 | 230 |
| Visit the countryside | 55,7 | 127 |
| Sailing | 52,2 | 194 |
| Hiking (less than two hours) | 50,4 | 133 |
| | | |
| <u>Visit amusement parks</u> | 40,0 | 209 |
| <u>Saltw ater fishing</u> | 38,3 | 183 |
| <u>Freshw ater fishing</u> | 34,8 | 172 |
| <u>Play w ith the children</u> | 46,1 | 156 |

Comparison Finland vs. Norway (German base)

| | Destination features |
|-------------------|---|
| Unique to Norway | Has beautiful nature Has nature that offers opportunities for discovery |
| Common ground | Is not too warm Has unspoiled nature Has quiet environments Allows me to live close to nature Is expensive Is safe |
| Unique to Finland | None |

| | Emotional benefits |
|-------------------|---|
| Unique to Norway | 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 Finland | Allows me to keep everything under control Makes me feel special |

| | Activities |
|-------------------|---|
| Unique to Norway | Observe beauty of nature Hiking (more than two hours) Experience mountains Saltwater fishing Rafting |
| Common ground | Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) Experience the wilderness Do winter activities (dog-sleigh, snowmobile etc) Kayaking/canoeing |
| Unique to Finland | Take part in a course/educational activity Visit the countryside |

| | Personality |
|-------------------|---|
| Unique to Norway | Authentic Active Adventurous Unique Explorative |
| Common ground | Peaceful Soothing Fresh |
| Unique to Finland | Cozy Structured |

Scorecard – Finland German base

| Emotional features | | |
|---|------|-------|
| (n=125) | % | Index |
| Helps me to escape from my hectic daily life | 38,4 | 114 |
| Allows me to discover new and interesting places | 38,4 | 96 |
| Gives me rich experiences | 32,8 | 93 |
| Gives me a safe feeling | 32,0 | 138 |
| Allows me to broaden my knowledge | 32,0 | 90 |
| | | |
| <u>Makes me feel completely liberated</u> | 27,2 | 135 |
| <u>Allows me to show my superior lifestyle</u> | 8,8 | 134 |
| <u>Makes me feel special</u> | 13,6 | 134 |
| <u>Makes me stand out from the crowd</u> | 13,6 | 133 |
| <u>Allows me to come to my senses</u> | 24,8 | 131 |
| <u>Allows me to keep everything under control</u> | 19,2 | 130 |
| <u>Allows me to impress other people</u> | 9,6 | 123 |
| Destination features | | |
| (n=125) | % | Index |
| Is safe | 54,4 | 162 |
| Is not too warm | 53,6 | 185 |
| Has unspoiled nature | 52,8 | 169 |
| Has friendly people | 51,2 | 108 |
| Has quiet environments | 49,6 | 144 |
| | | |
| <u>Has environmentally friendly offers</u> | 39,2 | 177 |
| <u>Has no kids</u> | 5,6 | 169 |
| <u>Is expensive</u> | 36,0 | 158 |
| <u>Allows me to live close to nature</u> | 48,0 | 146 |
| <u>Is not ruined by tourism</u> | 36,0 | 143 |
| <u>Has good medical care</u> | 43,2 | 142 |

| Personality | | |
|---|------|-------|
| (n=125) | % | Index |
| Peaceful | 36,0 | 134 |
| Soothing | 33,6 | 142 |
| Authentic | 32,0 | 107 |
| Friendly | 30,4 | 79 |
| Cozy | 29,6 | 113 |
| Cultivated | 29,6 | 101 |
| | | |
| <u>Indulgent</u> | 14,4 | 183 |
| <u>Structured</u> | 27,2 | 136 |
| <u>Fresh</u> | 25,6 | 129 |
| <u>Extravagant</u> | 12,8 | 128 |
| <u>Open-minded</u> | 24,0 | 124 |
| Activity | | |
| (n=125) | % | Index |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) | 43,2 | 177 |
| Visit the countryside | 43,2 | 124 |
| Relaxation | 41,6 | 119 |
| Observe beauty of nature | 40,8 | 112 |
| Do winter activities (dog-sleigh, snowmobile etc.) | 40,0 | 248 |
| | | |
| <u>Cross-country skiing</u> | 36,8 | 224 |
| <u>Freshwater fishing</u> | 28,8 | 179 |
| <u>Kayaking/canoeing</u> | 27,2 | 155 |
| <u>Experience the wilderness</u> | 33,6 | 145 |
| <u>Experience wildlife</u> | 25,6 | 130 |
| <u>Take part in a course/ educational activity</u> | 14,4 | 125 |
| <u>Alpine skiing/snow boarding</u> | 21,6 | 124 |
| <u>Workout in gym/fitness centre</u> | 13,6 | 123 |

Comparison New Zealand vs. Norway (German base)

| | Destination features |
|-----------------------|---|
| Unique to Norway | Has beautiful nature Is not too warm Has quiet environments Is safe |
| Common ground | Has nature that offers opportunities for discovery Has unspoiled nature Allows me to live close to nature Is expensive Is not ruined by tourism |
| Unique to New Zealand | Allows me to grow personally |

| | Emotional benefits |
|-----------------------|---|
| Unique to Norway | Helps me to escape from my hectic daily life Gives me a safe feeling |
| Common ground | Restores my sense of harmony and balance Makes me feel completely liberated Allows me to come to my senses Allows me to let go without restrictions |
| Unique to New Zealand | Allows me to indulge in a bit of luxury Makes me feel special Allows me to keep everything under control Avoids too many surprises Shows that I am successful in life |

| | Activities |
|-----------------------|--|
| Unique to Norway | Do winter activities (dog-sleigh, snowmobile etc.) Saltwater fishing Cross-country skiing Saltwater fishing |
| Common ground | Observe beauty of nature Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) Experience the wilderness Hiking (more than two hours) Kayaking/canoeing |
| Unique to New Zealand | Diving Sailing Workout at gym/fitness centre |

| | Personality |
|-----------------------|---|
| Unique to Norway | Authentic Active Peaceful Soothing |
| Common ground | Adventurous Unique Explorative Fresh |
| Unique to New Zealand | Daring Superior Luxurious |

Scorecard - New Zealand German base

| Emotional benefits | | |
|---|------|-------|
| (n=141) | % | Index |
| Gives me rich experiences | 43,3 | 97 |
| Allow s me to discover new and interesting places | 41,1 | 81 |
| Allow s me to broaden my know ledge | 40,4 | 89 |
| Enriches my view of the w orld | 39,0 | 93 |
| Allow s me to broaden my horizon | 36,9 | 85 |
| | | |
| <u>Allow s me to show my superior lifestyle</u> | 16,3 | 196 |
| <u>Show s that I am successful in life</u> | 20,6 | 188 |
| <u>Allow s me to impress other people</u> | 18,4 | 185 |
| <u>Makes me feel special</u> | 23,4 | 180 |
| <u>Makes me stand out from the crow d</u> | 23,4 | 180 |
| <u>Makes me feel completely liberated</u> | 34,0 | 132 |
| <u>Avoids too many surprises</u> | 22,0 | 123 |

| Destination features | | |
|---|------|-------|
| (n=141) | % | Index |
| Has nature that offers opportunities for discovery | 53,9 | 124 |
| Offers a wide range of possible activities | 51,1 | 106 |
| Has unspoiled nature | 51,1 | 144 |
| Has beautiful nature | 50,4 | 105 |
| Has friendly people | 49,6 | 92 |
| Allow s me to have unique experiences | 49,6 | 108 |
| | | |
| <u>Is a high-class destination</u> | 35,5 | 282 |
| <u>Is not for just anybody, is exclusive</u> | 32,6 | 248 |
| <u>Is expensive</u> | 39,7 | 154 |
| <u>Is not ruined by tourism</u> | 41,1 | 144 |
| <u>Has environmentally friendly offers</u> | 36,2 | 144 |
| <u>Allow s me to live close to nature</u> | 47,5 | 127 |
| <u>Allow s me to grow personally</u> | 33,3 | 127 |
| <u>Has few language barriers</u> | 32,6 | 122 |

| Personality | | |
|--------------------|------|-------|
| (n=141) | % | Index |
| Unique | 41,1 | 133 |
| Explorative | 39,7 | 139 |
| Adventurous | 36,9 | 123 |
| Peaceful | 34,8 | 109 |
| Active | 34,0 | 97 |
| Friendly | 34,0 | 74 |
| | | |
| <u>Superior</u> | 18,4 | 199 |
| <u>Indulgent</u> | 14,2 | 151 |
| <u>Extravagant</u> | 14,9 | 125 |
| <u>Naughty</u> | 14,2 | 125 |
| <u>Playful</u> | 13,5 | 120 |

| Activity | | |
|---|------|-------|
| (n=141) | % | Index |
| Observe beauty of nature | 53,2 | 131 |
| Experience the wilderness | 48,9 | 190 |
| Hiking (more than two hours) | 39,0 | 125 |
| Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) | 39,0 | 144 |
| Discover local culture and lifestyle | 38,3 | 93 |
| | | |
| <u>Kayaking/canoeing</u> | 32,6 | 167 |
| <u>Extreme sport activities (mountain climbing, kiting, paragliding etc.)</u> | 35,5 | 167 |
| <u>Experience w ildlife</u> | 34,8 | 158 |
| <u>Diving</u> | 30,5 | 140 |
| <u>Visit national parks</u> | 35,5 | 139 |
| <u>Rafting</u> | 26,2 | 138 |
| <u>Workout in gym/fitness centre</u> | 17,0 | 138 |
| <u>Freshw ater fishing</u> | 24,1 | 135 |
| <u>Sailing</u> | 30,5 | 128 |
| <u>Experience mountains</u> | 35,5 | 124 |

Comparison Sweden vs. Norway (German base)

| | Destination features |
|------------------|---|
| Unique to Norway | Has beautiful nature Has nature that offers opportunities for discovery |
| Common ground | Has unspoiled nature Is not too warm Allows me to live close to nature Is expensive Is safe |
| Unique to Sweden | None |

| | Emotional benefits |
|------------------|---|
| Unique to Norway | Helps me to escape from my hectic daily life Makes me stand out from the crowd |
| Common ground | Restores my sense of harmony and balance Gives me a safe feeling Makes me feel completely liberated |
| Unique to Sweden | Makes me feel full of energy Makes me feel on top of the world Allows me to keep everything under control |

| | Activities |
|------------------|---|
| Unique to Norway | Observe beauty of nature Hiking (more than two hours) Experience mountains Saltwater fishing |
| Common ground | Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes) Experience the wilderness Do winter activities (dog-sleigh, snowmobile etc.) Kayaking/canoeing Experience wildlife |
| Unique to Sweden | Attend concerts/festivals |

| | Personality |
|------------------|---|
| Unique to Norway | Authentic Active Adventurous Unique Explorative |
| Common ground | Peaceful Harmonious Relaxed Soothing |
| Unique to Sweden | Cozy Caring |

| Emotional benefits (n=144) | | |
|---|------|-------|
| | % | Index |
| Helps me to escape from my hectic daily life | 60,4 | 105 |
| Gives me rich experiences | 59,7 | 99 |
| Gives me a safe feeling | 58,3 | 148 |
| Allows me to discover new and interesting places | 56,9 | 84 |
| Restores my sense of harmony and balance | 54,9 | 133 |
| | | |
| <u>Makes me feel completely liberated</u> | 53,5 | 155 |
| <u>Allows me to come to my senses</u> | 43,8 | 135 |
| <u>Allows me to let go without restrictions</u> | 44,4 | 125 |
| <u>Allows me to keep everything under control</u> | 31,2 | 125 |
| | | |
| Destination features (n=144) | | |
| | % | Index |
| Has beautiful nature | 79,2 | 118 |
| Has friendly people | 77,1 | 103 |
| Is not too warm | 77,1 | 168 |
| Is safe | 77,1 | 145 |
| Has quiet environments | 75,7 | 139 |
| Allows me to live close to nature | 75,7 | 146 |
| | | |
| <u>Has environmentally friendly offers</u> | 62,5 | 178 |
| <u>Is expensive</u> | 57,6 | 160 |
| <u>Is not ruined by tourism</u> | 61,8 | 155 |
| <u>Has unspoiled nature</u> | 73,6 | 149 |
| <u>Has good medical care</u> | 66,7 | 138 |
| <u>Is well organised</u> | 57,6 | 121 |

| Personality (n=144) | | |
|---|------|-------|
| | % | Index |
| Friendly | 66,0 | 103 |
| Peaceful | 62,5 | 140 |
| Harmonious | 57,6 | 139 |
| Relaxed | 52,1 | 115 |
| Authentic | 52,1 | 105 |
| | | |
| <u>Fresh</u> | 47,2 | 143 |
| <u>Open-minded</u> | 42,4 | 132 |
| <u>Soothing</u> | 50,0 | 127 |
| | | |
| Activity (n=144) | | |
| | % | Index |
| Observe beauty of nature | 71,5 | 113 |
| Visit the countryside | 66,7 | 110 |
| Relaxation | 62,5 | 103 |
| Taste local food and drink | 60,4 | 82 |
| Hiking (more than two hours) | 57,6 | 118 |
| | | |
| <u>Do winter activities (dog-sleigh, snow mobile etc.)</u> | 50,7 | 181 |
| <u>Cross-country skiing</u> | 47,9 | 168 |
| <u>Freshwater fishing</u> | 46,5 | 167 |
| <u>Kayaking/canoeing</u> | 48,6 | 160 |
| <u>Experience wildlife</u> | 53,5 | 156 |
| <u>Experience the wilderness</u> | 54,9 | 137 |
| <u>Rafting</u> | 40,3 | 136 |
| <u>Observe natural phenomenon (i.e. volcanoes, northern lights, midnight sun, breaking waves, sand dunes)</u> | 54,2 | 128 |
| <u>Attend concerts/festivals</u> | 35,4 | 127 |
| <u>Visit national parks</u> | 49,3 | 124 |

Comparison Switzerland vs. Norway (German base)

| | Destination features |
|-----------------------|--|
| Unique to Norway | <ul style="list-style-type: none"> Has beautiful nature Has nature that offers opportunities for discovery Has unspoiled nature Has quiet environments |
| Common ground | <ul style="list-style-type: none"> Is not too warm Is expensive Is safe Has good medical care |
| Unique to Switzerland | <ul style="list-style-type: none"> Has attractive mountain areas Is well organised Is easy to travel to Has few language barriers Has classy restaurants |
| | Emotional benefits |
| Unique to Norway | <ul style="list-style-type: none"> Helps me to escape from my hectic daily life Restores my sense of harmony and balance Makes me feel completely liberated Allows me to come to my senses |
| Common ground | <ul style="list-style-type: none"> Gives me a safe feeling |
| Unique to Switzerland | <ul style="list-style-type: none"> Gives me a sense of being well cared for Allow me to indulge in a bit of luxury Allows me to keep everything under control Avoids too many surprises Makes me feel sophisticated |

| | Activities |
|-----------------------|---|
| Unique to Norway | <ul style="list-style-type: none"> Observe beauty of nature Observe natural phenomenon (i.e. northern lights etc.) Experience wilderness Kayaking/canoeing Experience wildlife |
| Common ground | <ul style="list-style-type: none"> Experience mountains Do winter activities (dog-sleigh, snowmobile etc.) Alpine skiing/snowboarding Hiking (more than two hours) Rafting Cross-country skiing |
| Unique to Switzerland | <ul style="list-style-type: none"> Hiking (less than two hours) Visit spa resorts Cycling |
| | Personality |
| Unique to Norway | <ul style="list-style-type: none"> Authentic Active Soothing Unique Adventurous |
| Common ground | <ul style="list-style-type: none"> Peaceful |
| Unique to Switzerland | <ul style="list-style-type: none"> Cultivated Structured Classy Cozy |

Scorecard – Switzerland : German base

| Emotional benefits | | |
|--|------|-------|
| (n=258) | % | Index |
| Gives me a safe feeling | 58,1 | 163 |
| Allow s me to discover new and interesting places | 54,3 | 88 |
| Allow s me to share good times w ith others | 53,5 | 100 |
| Gives me rich experiences | 49,6 | 91 |
| Allow s me to broaden my know ledge | 49,2 | 90 |
| | | |
| <u>Allow s me to indulge in a bit of luxury</u> | 41,5 | 161 |
| <u>Avoids too many surprises</u> | 33,3 | 153 |
| <u>Allow s me to keep everything under control</u> | 34,5 | 152 |
| <u>Show s that I am successful in life</u> | 19,0 | 143 |
| <u>Gives me a sense of being w ell cared for</u> | 43,8 | 135 |
| <u>Makes me feel sophisticated</u> | 32,6 | 133 |

| Destination features | | |
|--|------|-------|
| (n=258) | % | Index |
| Has attractive mountain areas | 87,2 | 154 |
| Has good medical care | 81,4 | 157 |
| Is expensive | 78,3 | 203 |
| Is safe | 77,5 | 136 |
| Is well organised | 76,7 | 151 |
| | | |
| <u>Is a high-class destination</u> | 46,9 | 249 |
| <u>Is not too different from home</u> | 46,1 | 224 |
| <u>Is not for just anybody, is exclusive</u> | 37,2 | 189 |
| <u>Has few language barriers</u> | 73,6 | 183 |
| <u>Is easy to travel to</u> | 76,0 | 144 |
| <u>Has classy restaurants</u> | 70,2 | 138 |
| <u>Has good service</u> | 67,4 | 126 |
| <u>Is not too w arm</u> | 60,9 | 123 |
| <u>Has environmentally friendly offers</u> | 45,7 | 122 |

| Personality | | |
|--------------------|------|-------|
| (n=258) | % | Index |
| Cultivated | 67,4 | 148 |
| Structured | 58,5 | 189 |
| Classy | 55,4 | 259 |
| Peaceful | 53,5 | 128 |
| Cozy | 51,2 | 126 |
| | | |
| <u>Luxurious</u> | 46,9 | 249 |
| <u>Extravagant</u> | 31,0 | 200 |
| <u>Superior</u> | 20,5 | 170 |
| <u>Predictable</u> | 33,3 | 161 |

| Activity | | |
|---|------|-------|
| (n=258) | % | Index |
| Experience mountains | 82,2 | 196 |
| Alpine skiing/snowboarding | 77,1 | 272 |
| Hiking (more than two hours) | 70,9 | 155 |
| Taste local food and drink | 64,3 | 93 |
| Hiking (less than two hours) | 63,6 | 129 |
| | | |
| <u>Cross-country skiing</u> | 59,7 | 223 |
| <u>Visit spa resorts</u> | 48,8 | 221 |
| <u>Extreme sport activities (mountain climbing, kiting, paragliding etc.)</u> | 60,5 | 194 |
| <u>Do w inter activities (dog-sleigh, snow mobile etc)</u> | 48,8 | 186 |
| <u>Rafting</u> | 39,5 | 142 |
| <u>Attend theatre, ballet, opera performances</u> | 33,3 | 137 |
| <u>Cycling</u> | 47,3 | 126 |

3) Overall positioning and targeting

Holiday types

The segments' share of each holiday type – all travel

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

The segments' share of holiday types – Germany

- all destinations

| | N | Liberation | Sharing Good Times | Togetherness | Harmony | Routine | Broadening your horizon | Luxury | Exploration |
|---|------|------------|--------------------|--------------|---------|---------|-------------------------|--------|-------------|
| Skiing holiday | 253 | 18 % | 30 % | 29 % | 4 % | 4 % | 6 % | 0 % | 9 % |
| Visiting friends and relatives | 514 | 5 % | 32 % | 19 % | 5 % | 9 % | 14 % | 3 % | 12 % |
| Hiking holiday | 253 | 7 % | 21 % | 32 % | 4 % | 6 % | 10 % | 1 % | 20 % |
| Fishing holiday | 36 | 3 % | 13 % | 47 % | 9 % | 0 % | 2 % | 13 % | 13 % |
| Sightseeing/roundtrip | 375 | 3 % | 15 % | 10 % | 3 % | 7 % | 37 % | 0 % | 23 % |
| Active holiday (golf, rafting, cycling etc.) | 82 | 8 % | 24 % | 21 % | 2 % | 0 % | 23 % | 0 % | 22 % |
| City trip/city break | 176 | 5 % | 17 % | 9 % | 3 % | 0 % | 40 % | 7 % | 19 % |
| Cruise holiday | 64 | 0 % | 20 % | 9 % | 16 % | 0 % | 39 % | 0 % | 15 % |
| Sun and beach holiday | 357 | 7 % | 27 % | 34 % | 6 % | 3 % | 14 % | 2 % | 8 % |
| Camping holiday | 76 | 15 % | 17 % | 26 % | 2 % | 4 % | 22 % | 0 % | 15 % |
| Cottage holiday (hired/own/borrowed cottage/holiday home) | 253 | 4 % | 13 % | 39 % | 15 % | 4 % | 16 % | 0 % | 9 % |
| Holiday to experience nature, scenery and wildlife | 186 | 3 % | 21 % | 19 % | 2 % | 2 % | 25 % | 0 % | 28 % |
| Short trips/extended weekend trips | 115 | 4 % | 19 % | 34 % | 10 % | 8 % | 21 % | 1 % | 4 % |
| Backpacking | 40 | 2 % | 2 % | 5 % | 0 % | 3 % | 52 % | 0 % | 36 % |
| Summer holiday/main holiday/annual leave | 390 | 2 % | 24 % | 25 % | 6 % | 3 % | 19 % | 3 % | 18 % |
| Total | 3170 | 5 % | 22 % | 24 % | 6 % | 5 % | 21 % | 2 % | 16 % |

The green cells indicate which holiday type is most relevant in each segment

Skiing holiday – German tourists

N=253



- Profile
- Motivations for skiing
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to skiing holiday
 - Who comes today?

WHO

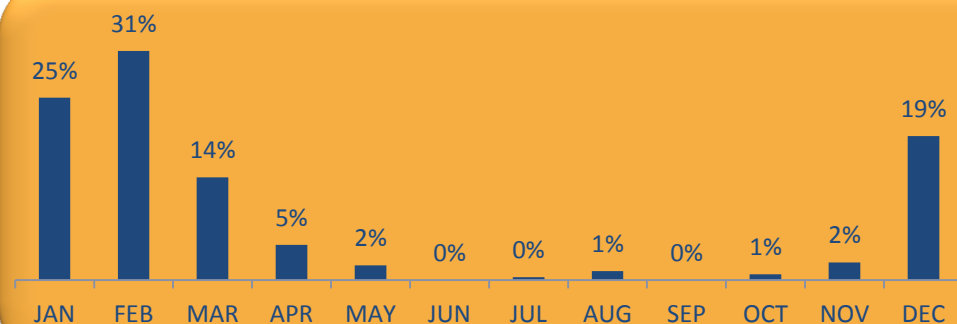
travels

DEMOGRAPHICS

- Slight male dominance (55/45)
- Dominated by age group 40-49 (44%). 40+ constitutes 70%
- 32% of the travellers have a household income of 50,000 euros or more, 1% make 100,000 euros per year or more

WHEN

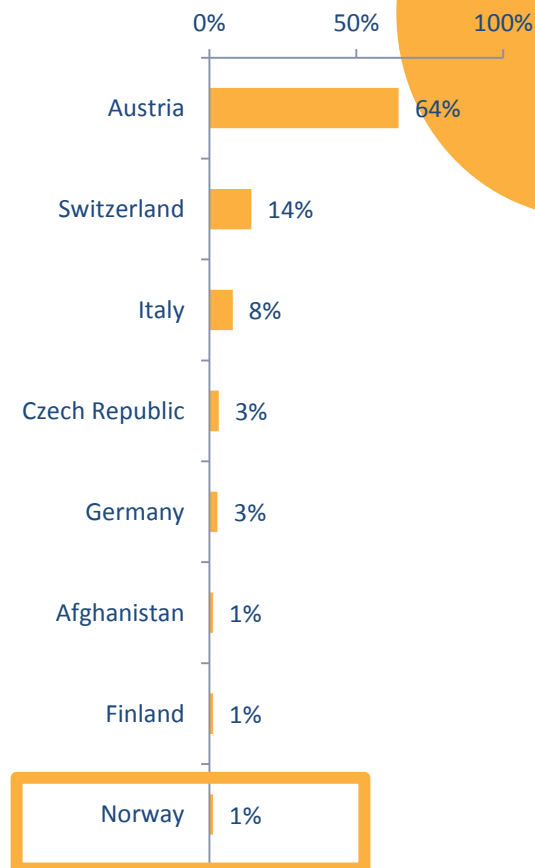
do they travel?



Average length of stay: 7 days

WHERE

do they travel to?



HOW do they travel?

ACCOMODATION

- Hotel - medium standard (32%)
- Rented or borrowed cabin / holiday home / flat (25%)

TRAVEL TO DESTINATION

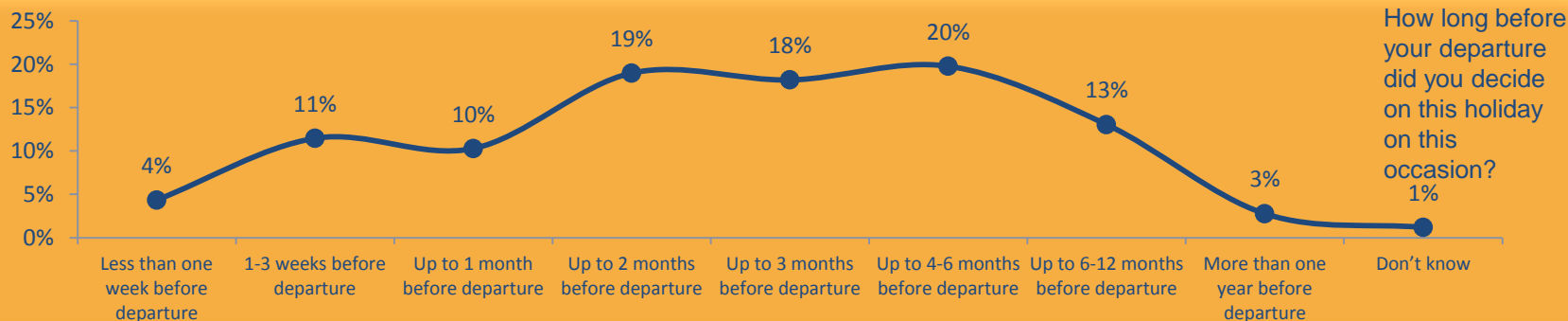
- Dominated by car (81%)
- Bus (9%)

WITH WHOM

- Spouse/partner (65%)
 - Children (34%)
 - Friends (33%)

PLANNING and ORGANISATION

- Mostly organised on their own (77%)
- Some organised group travel (15%)



WHY

do they travel?

EMOTIONAL BENEFITS

- **Allows me to share good times with others**
 - Helps me to escape from my hectic daily life
 - **Makes me feel full of energy**
 - Helps me enjoy life to the fullest
 - Creates precious moments of togetherness

PERSONALITY

- **Active**
- **Sociable**
 - Cozy
 - Friendly
 - Outgoing

WHAT

are they looking for?

DESTINATION FEATURES

- **Has attractive mountain areas**
- **Allows me to be physically active**
 - **Is safe**
 - Has friendly people
 - Has beautiful nature

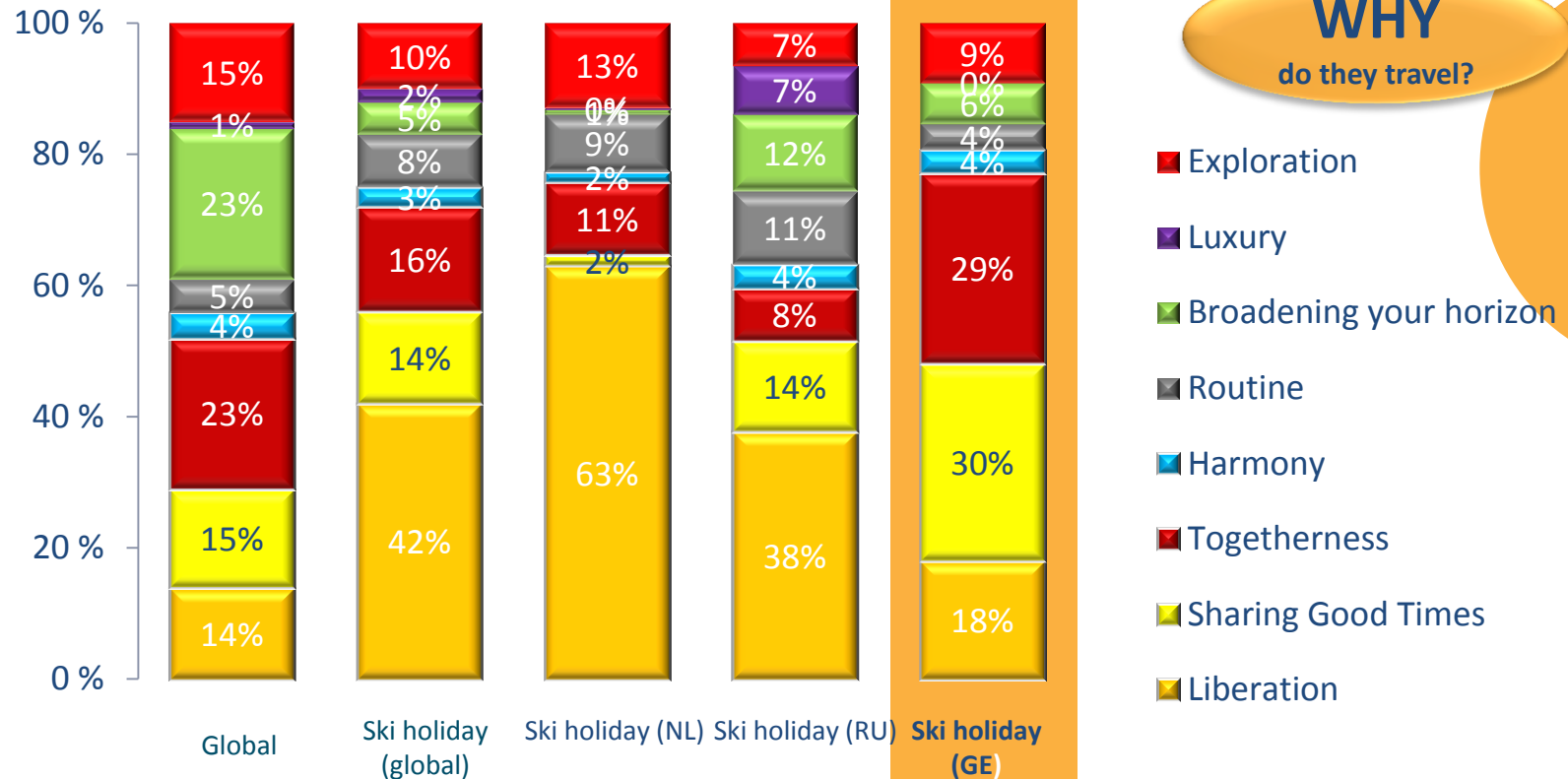
ACTIVITIES

- **Alpine skiing/snowboarding**
 - Experience mountains
- **Taste local food and drink**
 - Visit restaurants
- **Observe beauty of nature**

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a skiing holiday?



CONCLUSION:

'Sharing Good Times' is the dominant motivation for going skiing, closely followed by 'Togetherness'.

Sightseeing/roundtrip – German tourists

N=375



- Profile
- Motivations for sightseeing/roundtrip
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to sightseeing/roundtrip
 - Who comes today?

WHO

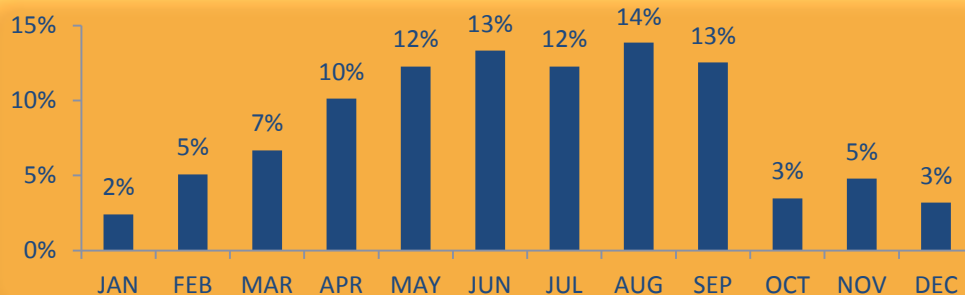
travels

DEMOGRAPHICS

- Dominated by age group 50-59 (30%), 40+ constitutes 70%
- Higher education (39%)
- 31% of the travellers have a household income of 50,000 euros or more, 3% make 100,000 euros per year or more.

WHEN

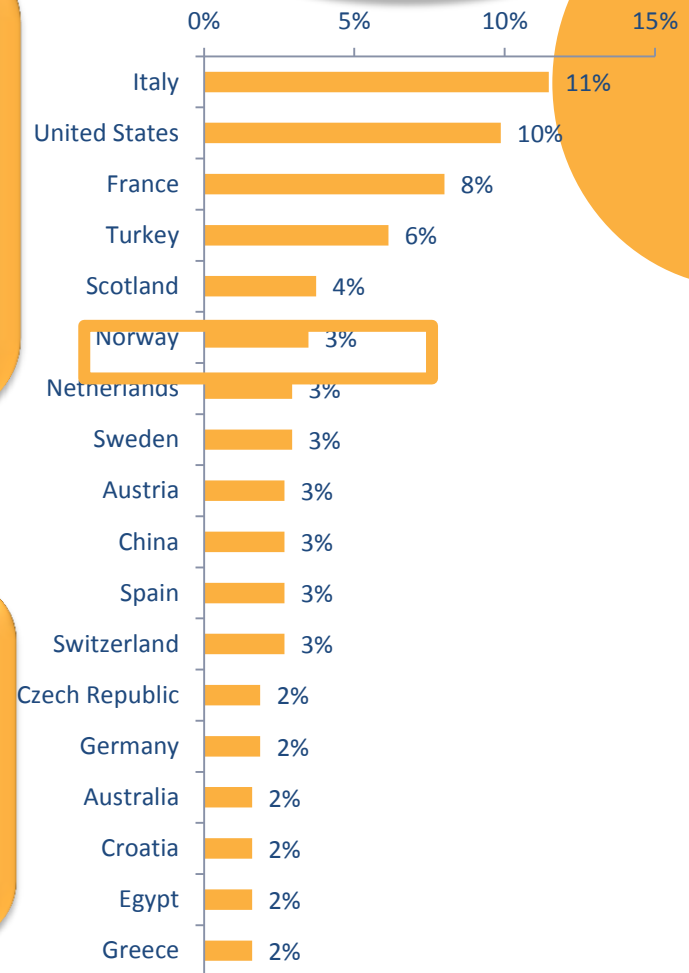
do they travel?



Average length of stay: 12 days

WHERE

do they travel to?



HOW do they travel?

ACCOMMODATION

- Almost exclusively hotels (95%)
- Mostly medium standard (51%)

TRAVEL TO DESTINATION

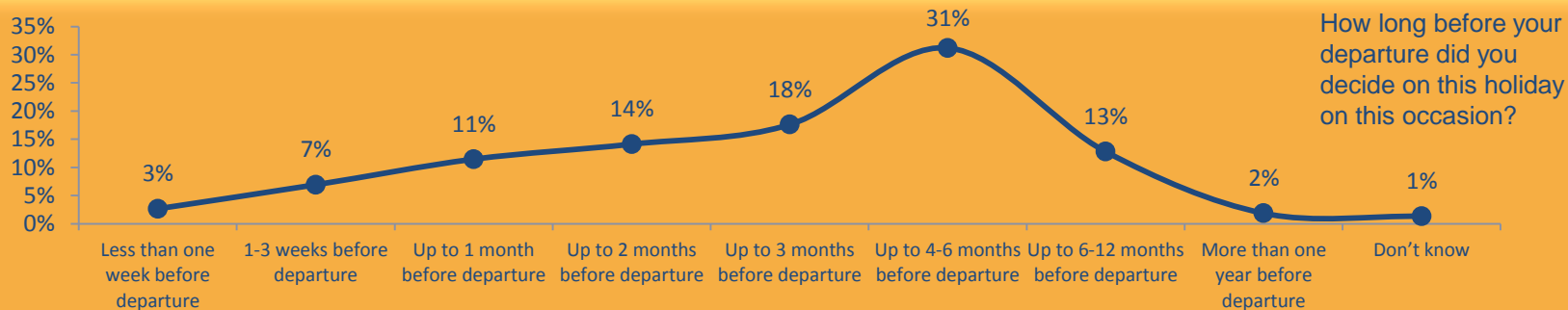
- Mostly scheduled flight (42%) and car (35%)
 - Bus (22%)
 - Charter flight (15%)

WITH WHOM

- Mostly with spouse/partner (57%)
 - Friends (23%)
 - Less often with children

PLANNING and ORGANISATION

- More organised on their own (57%)
- Also often organised group tours (34%)



WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Friendly
- Outgoing
- **Unique**
 - Active
- Harmonious

WHAT

are they looking for?

DESTINATION FEATURES

- **Has interesting sights**
 - Has friendly people
 - Has beautiful nature
- Allows me to have unique experiences
- **Has interesting culture and art**

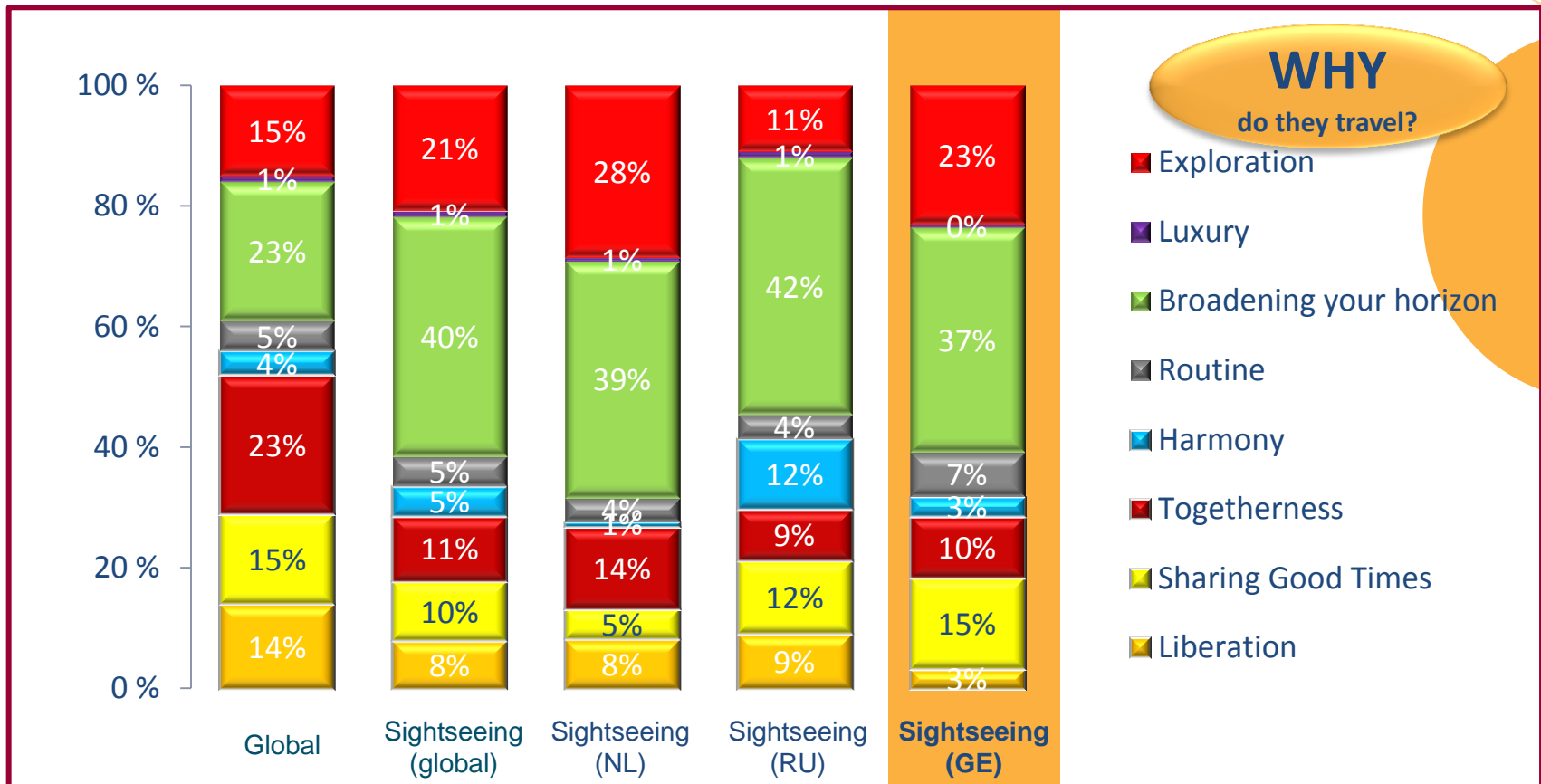
ACTIVITIES

- Taste local food and drink
 - Visit cities
- **Visit historical buildings/sites**
- Discover local culture and lifestyle
 - Observe beauty of nature
 - Visit restaurants

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. Another relevant motivation in Germany is 'Exploration'. 'Broadening your Horizon' dominates in all markets.

City trip/city break – German tourists

N=208



- Profile
- Motivations for City trip
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to City trip
 - Who comes today?

WHO

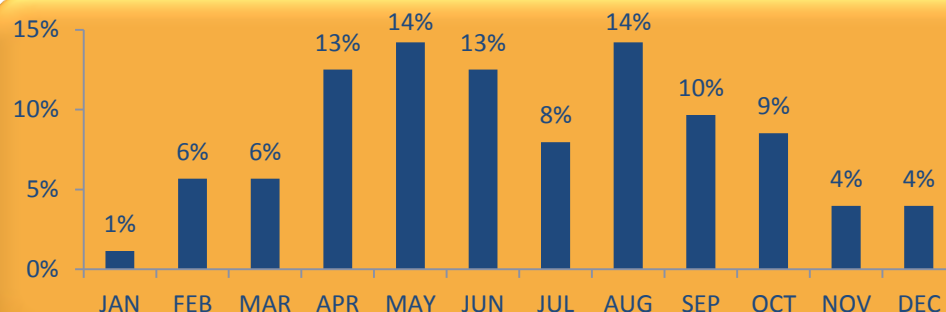
travels

DEMOGRAPHICS

- Dominated by age group 30-59 (66%)
- 28% of the travellers have a household income of 50,000 euros or more, 5% make 100,000 euros per year or more
- Intermediate to higher education

WHEN

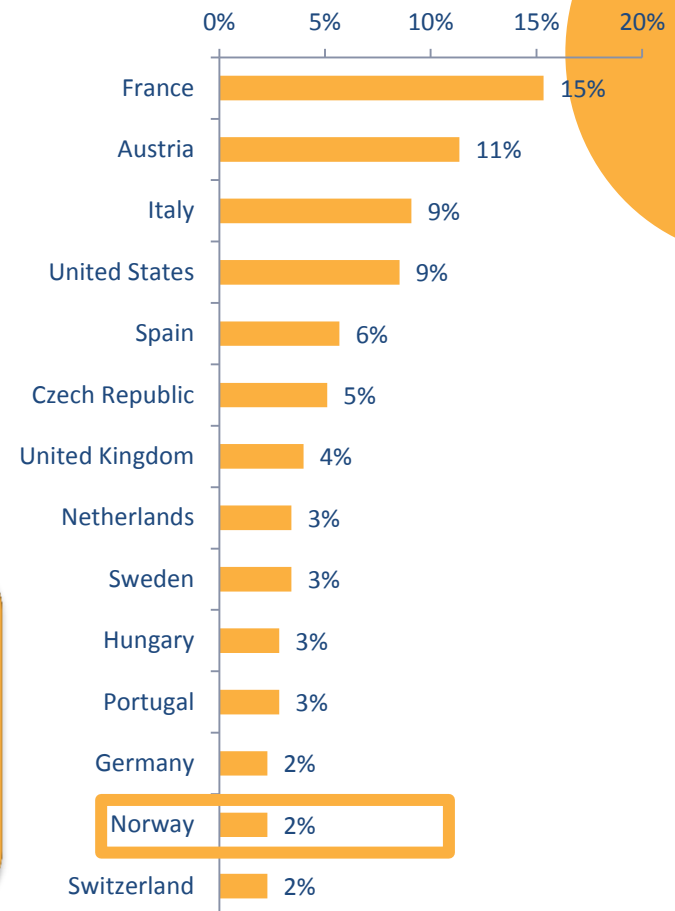
do they travel?



Average length of stay: 7 days

WHERE

do they travel to?



HOW do they travel?

ACCOMMODATION

- Hotel accommodation has 79% share (medium standard 43%)

TRAVEL TO DESTINATION

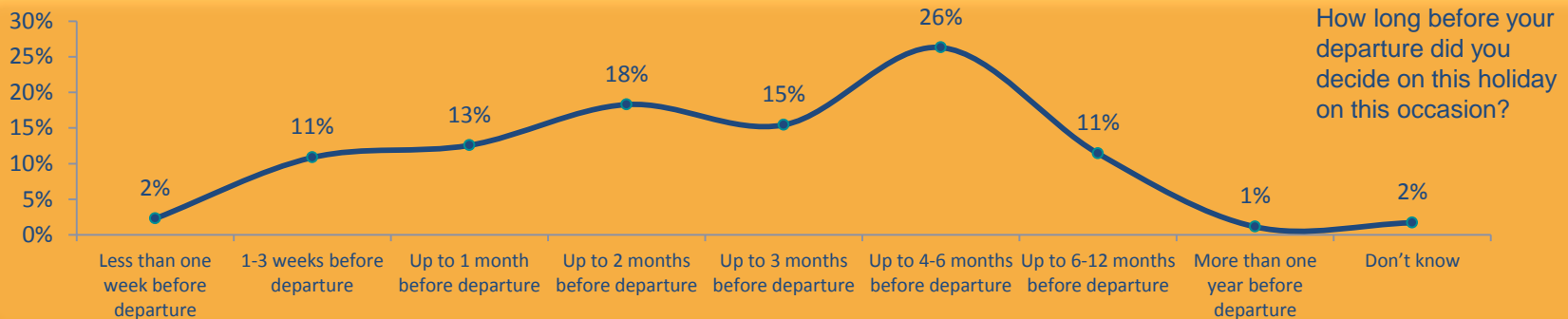
- Dominated by scheduled flight (50%)
 - Car (30%)
 - Train (18%)

WITH WHOM

- Spouse/partner (48%)
 - Friends (26%)
- Less often with children

PLANNING and ORGANISATION

- Mostly organised on their own/independent travel (79%)



WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Friendly
- Outgoing
- **Cultivated**
 - Active
- **Contemporary**

WHAT

are they looking for?

DESTINATION FEATURES

- Has interesting sights
 - Has friendly people
- Has interesting culture and art
- Has a variety of different restaurant offers
 - Has good shopping
- Has a variety of accommodation offers

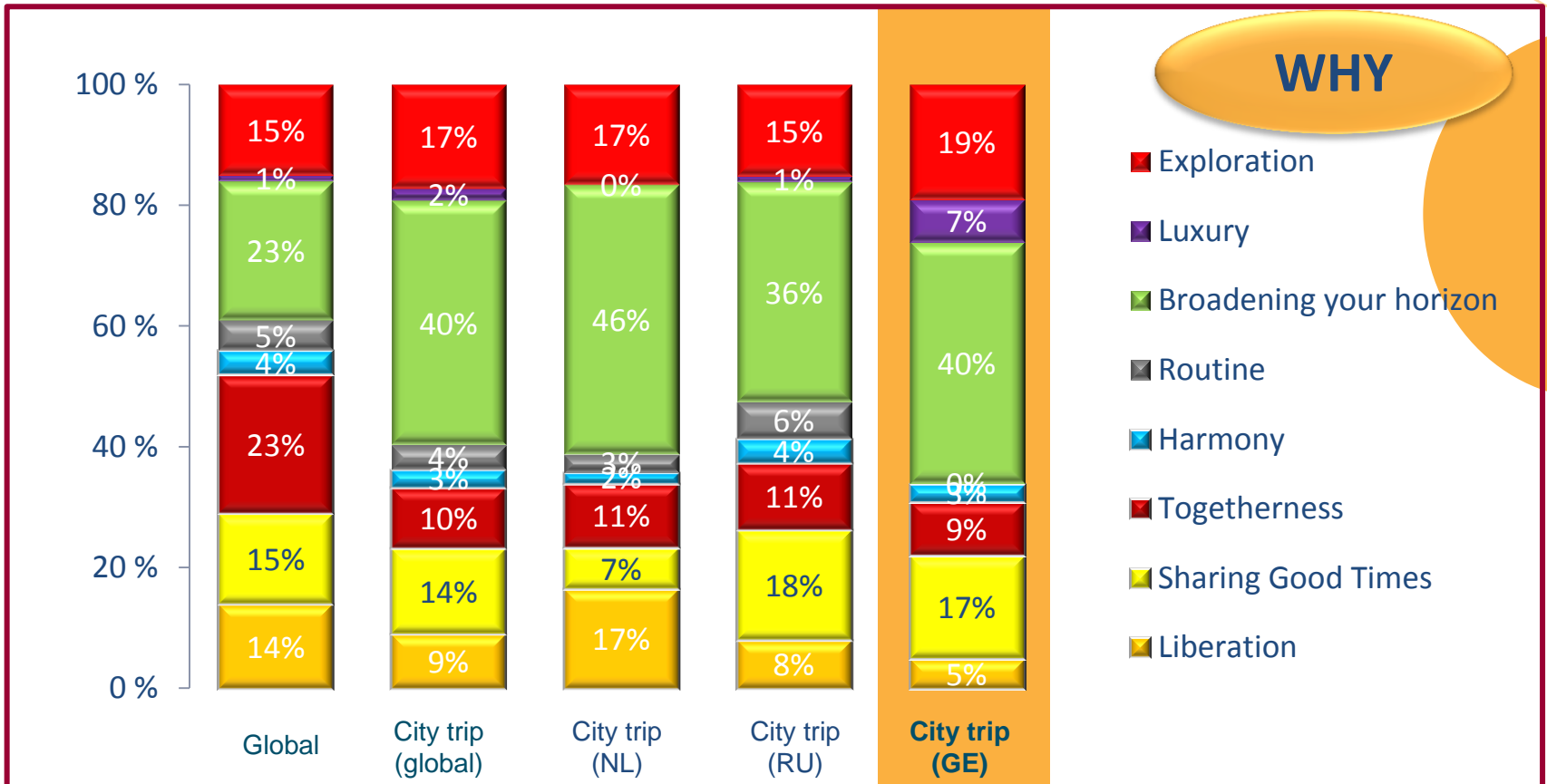
ACTIVITIES

- Visit cities
- Visit historical buildings/sites
 - Visit restaurants
- Experience local architecture
 - Taste local food and drink

Slide shows most important items

Bold = differentiating from other holiday types

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



CONCLUSION:

'Broadening your Horizon' is the most dominant motivation by far. Other motivations are 'Exploration' and 'Sharing Good Times'. This is the case for all markets, except for the Netherlands, where 'Sharing Good Times' has a lower share and 'Liberation' plays a more important role.

Holiday to experience nature – German tourists

N=186



- Profile
- Motivations for Holiday to experience nature
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to Holiday to experience nature
 - Who comes today?

WHO

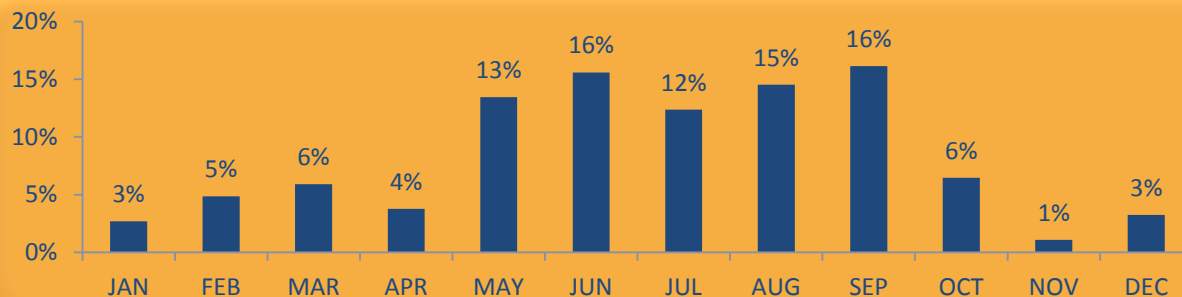
travels

DEMOGRAPHICS

- Dominated by age group 40-59 (60%)
- People aged 40+ constitute 70% of the travellers
- 25% of the travellers have a household income of 50,000 euros or more, 1% make 100,000 euros per year or more

WHEN

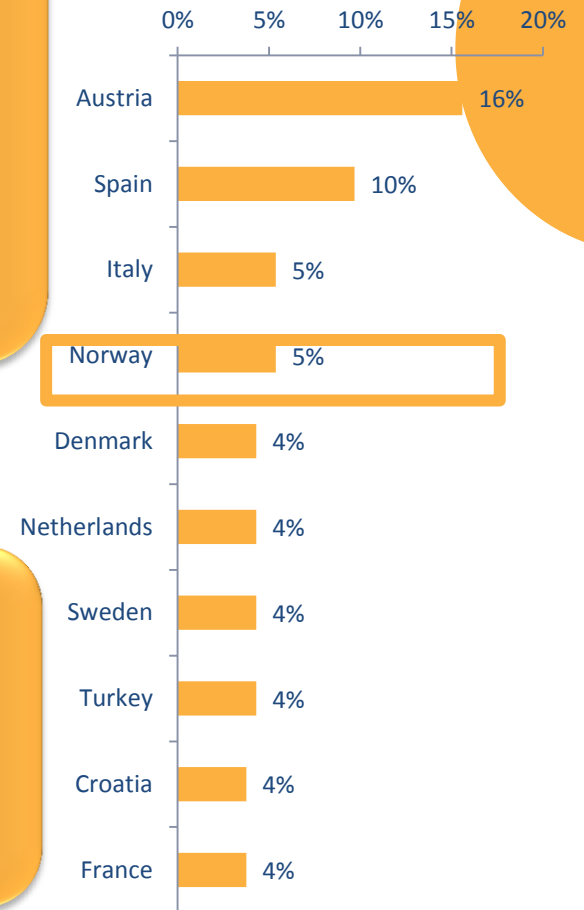
do they travel?



Average length of stay: 14 days

WHERE

do they travel to?



HOW do they travel?

ACCOMODATION

- Hotel medium standard (30%)
- Rented or borrowed cabin / holiday home / flat (28%)

TRAVEL TO DESTINATION

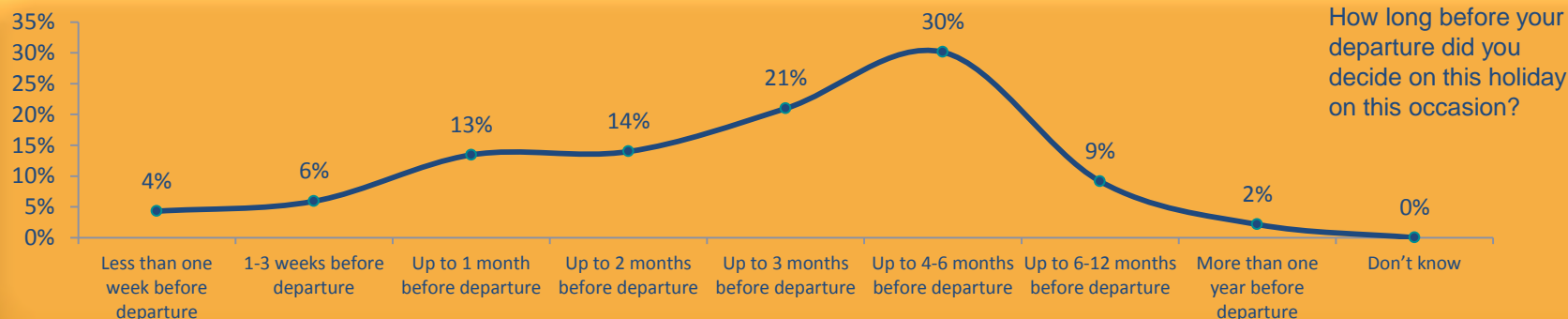
- Dominated by car (58%)
- Scheduled flight (29%)

WITH WHOM

- Spouse/partner (68%)
 - Children (26%)
 - Friends (24%)

PLANNING and ORGANISATION

- Organised on their own and travel independently (78%)



WHY

do they travel?

EMOTIONAL BENEFITS

- Allows me to discover new and interesting places
- Helps me to escape from my hectic daily life
 - Gives me rich experiences
- Creates precious moments of togetherness
 - Allows me to broaden my horizon

PERSONALITY

- Friendly
- Relaxed
- Harmonious
- Peaceful
- Active

WHAT

are they looking for?

DESTINATION FEATURES

- Has beautiful nature
- Has friendly people
- Has nature that offers opportunities for discovery
 - Is easy to travel around
 - Has interesting sights
- **Has unspoiled nature**

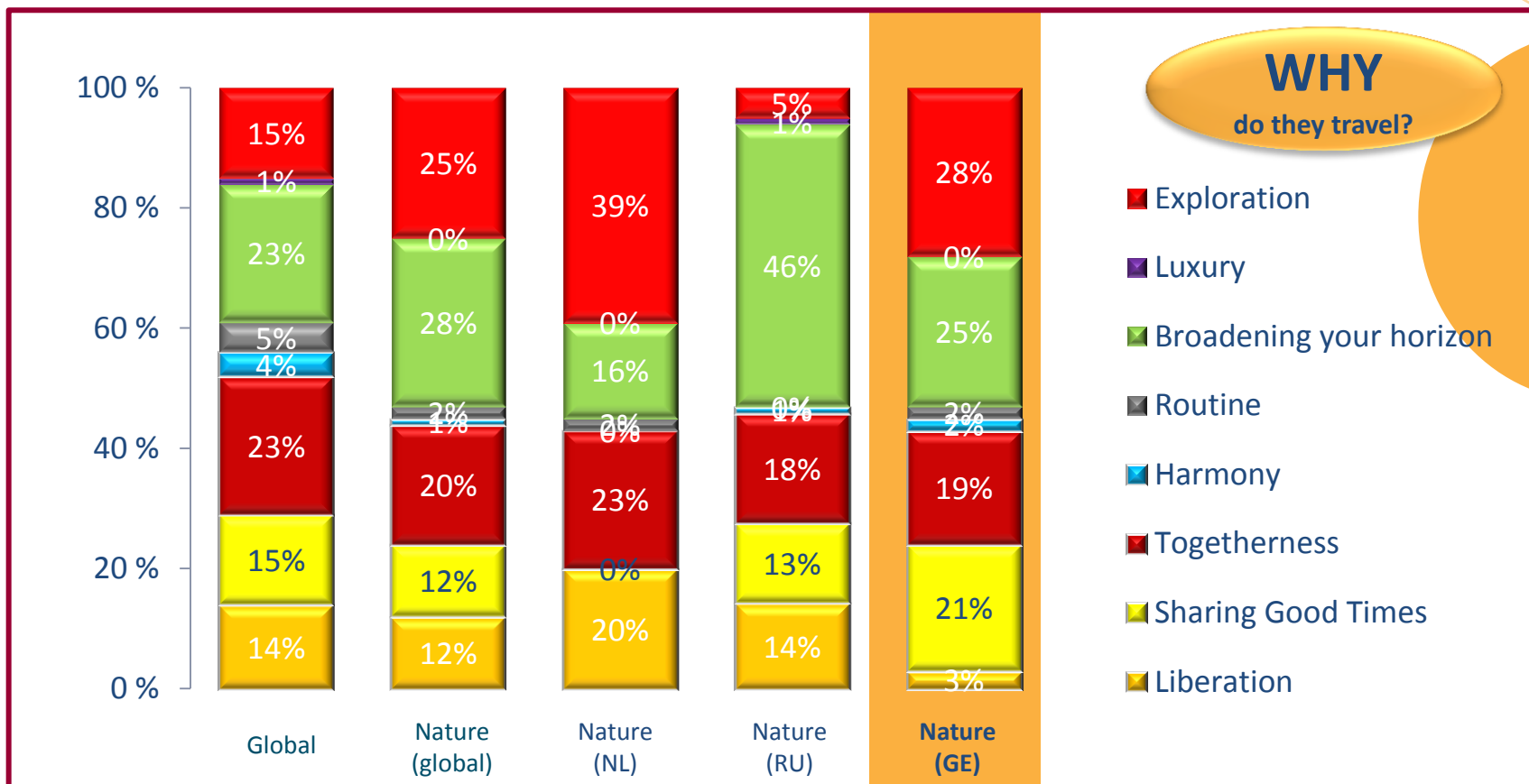
ACTIVITIES

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

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a Holiday to experience nature?



CONCLUSION:

'Exploration' is the dominant segment, 'Broadening your Horizon' is the second most important segment.

Camping holiday – German tourists

N= 76



- Profile
- Motivations for Camping holiday
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to Camping
 - Who comes today?

WHO

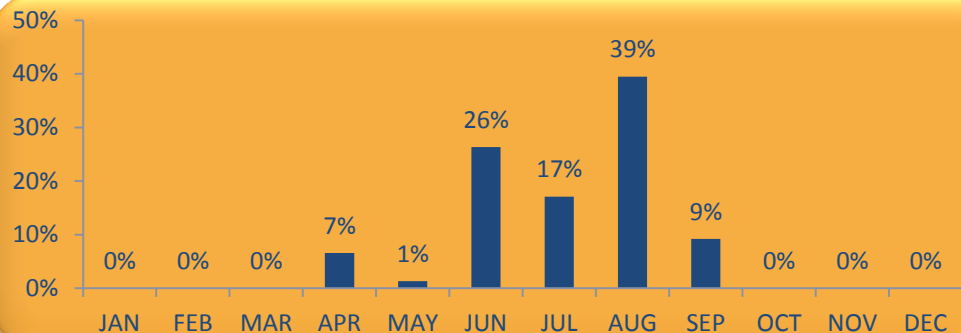
travels

DEMOGRAPHICS

- Dominated by age group 40-59 (62%)
- Only 12% of the travellers have a household income of 50,000 euros or more, 0% make 100,000 euros per year or more

WHEN

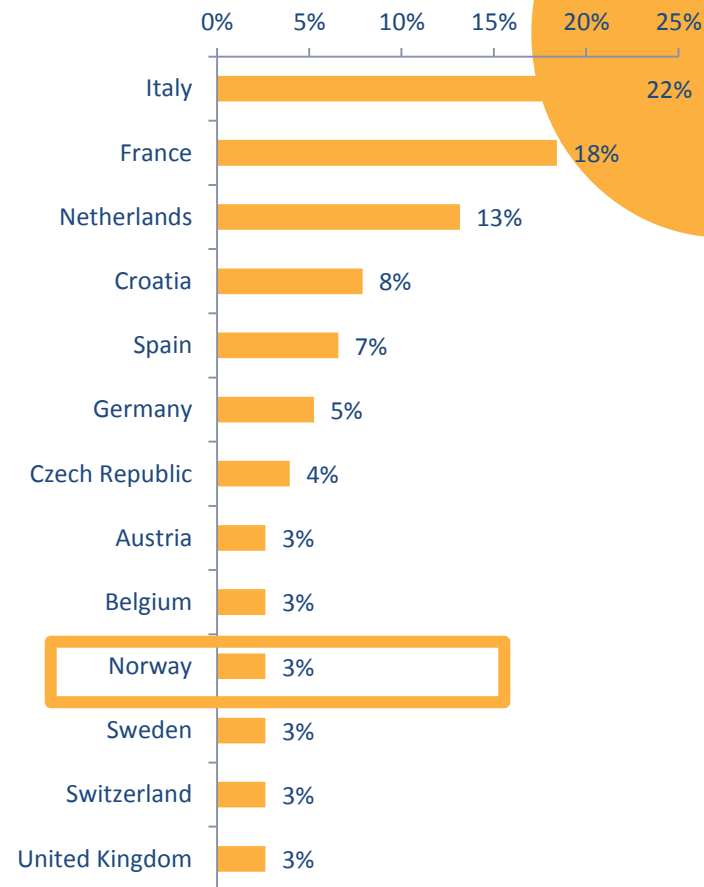
do they travel?



Average length of stay: 12 days

WHERE

do they travel to?



HOW

do they travel?

ACCOMODATION

- Tent (51%)
- Caravan/camper van (24%)

TRAVEL TO DESTINATION

- Car dominates (59%)
- Car with caravan (22%)

WITH WHOM

- Spouse/partner dominates (80%)
- Children aged 0-14 (28%)

PLANNING and ORGANISATION

- Almost exclusively people who organised the holiday on their own (95%)



Camping holiday

WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Friendly
- Relaxed
- **Cozy**
- Harmonious
- Peaceful

WHAT

are they looking for?

DESTINATION FEATURES

- **Is easy to travel around**
 - Has friendly people
- Offers a wide range of possible activities
 - Has beautiful nature
- **Allows me to live close to nature**

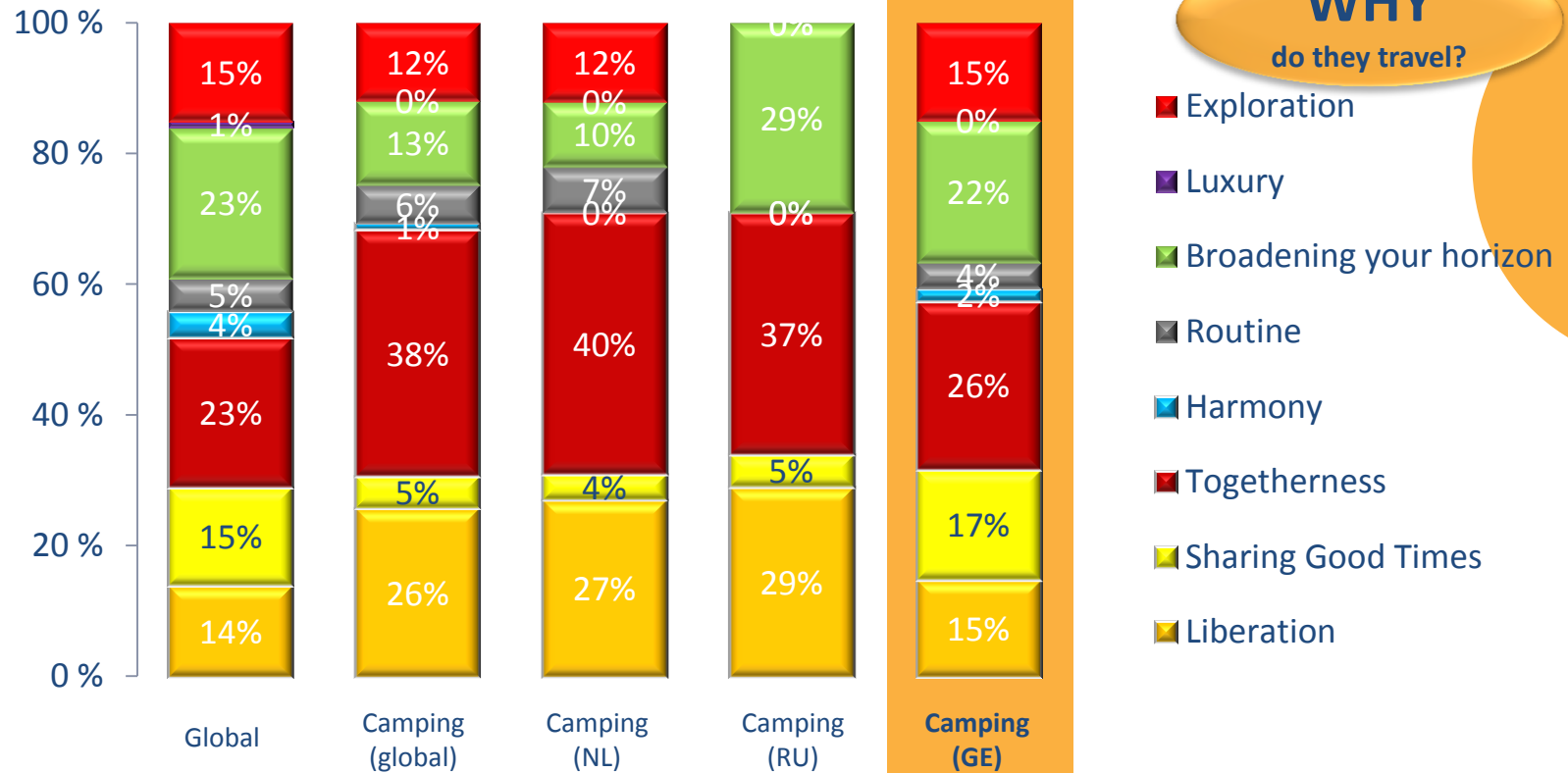
ACTIVITIES

- Relaxation
- Observe beauty of nature
- Taste local food and drink
 - Visit restaurants
- **Sunbathing and swimming**

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a Camping holiday?



CONCLUSION (low basis for Russia):

'Togetherness' is the dominating motivation with 'Broadening your Horizon' the second most important motivation in Germany.

Cottage holiday – German tourists

N= 253



- Profile
- Motivations for cottage holiday
- Role of Norway versus competitive landscape
 - Destination versus motivation with respect to cottage holiday
 - Who comes today?

WHO

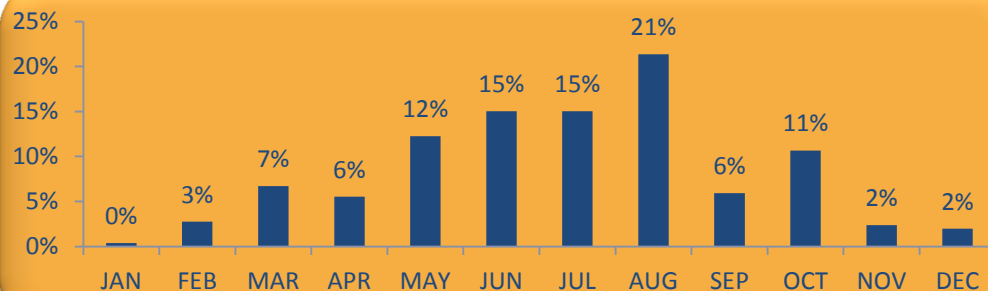
travels

DEMOGRAPHICS

- Dominated by age group 40-59 (60%)
- 27% of the travellers have a household income of 50,000 euros or more, 2% make 100,000 euros per year or more

WHEN

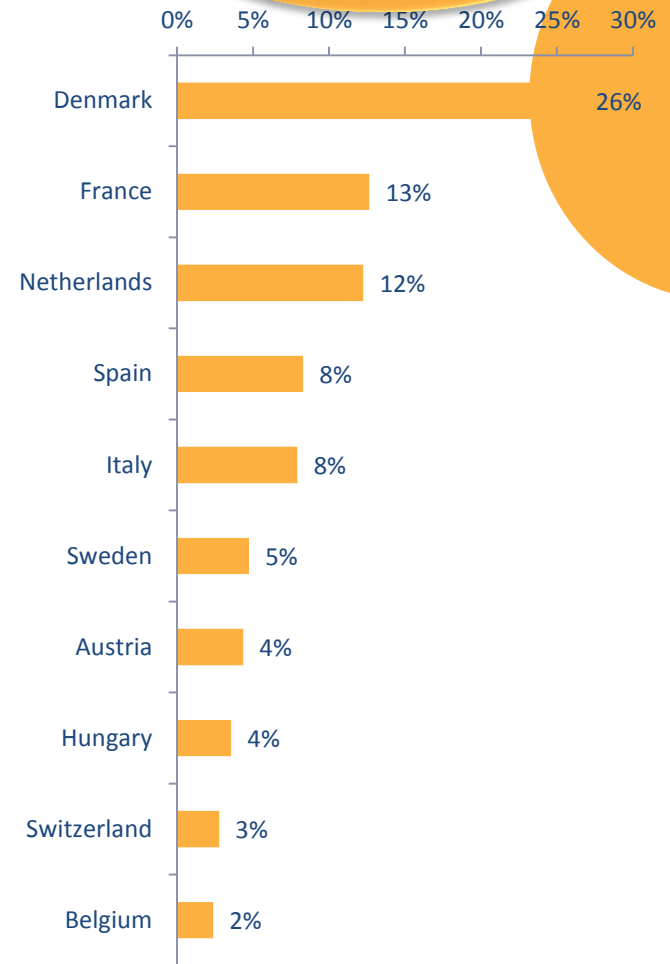
do they travel?



Average length of stay: 12 days

WHERE

do they travel to?



HOW

do they travel?

ACCOMODATION

- Rented or borrowed cabin / holiday home / flat

TRAVEL TO DESTINATION

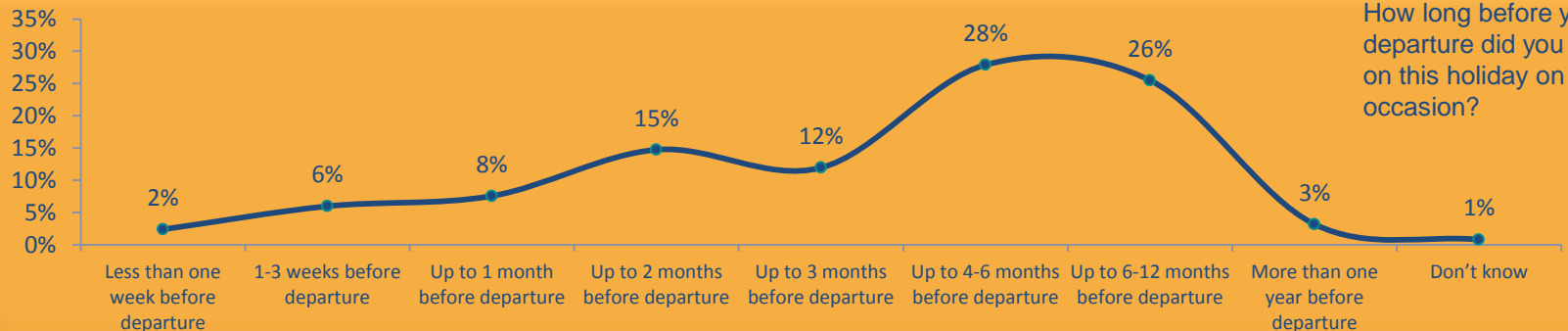
- Dominated by car (91%)

WITH WHOM

- Spouse/partner (78%)
- Children 0-6 (20%)
- Children 7-14 (30%)
- Other family/relatives (23%)
- Friends (22%)

PLANNING and ORGANISATION

- Almost exclusively organised on their own (94%)



WHY

do they travel?

EMOTIONAL BENEFITS

- Helps me to escape from my hectic daily life
- Allows me to share good times with others
- Creates precious moments of togetherness
- Restores my sense of harmony and balance
- Allows me to discover new and interesting places

PERSONALITY

- **Cozy**
- Relaxed
- Friendly
- **Soothing**
- Harmonious

WHAT

are they looking for?

DESTINATION FEATURES

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

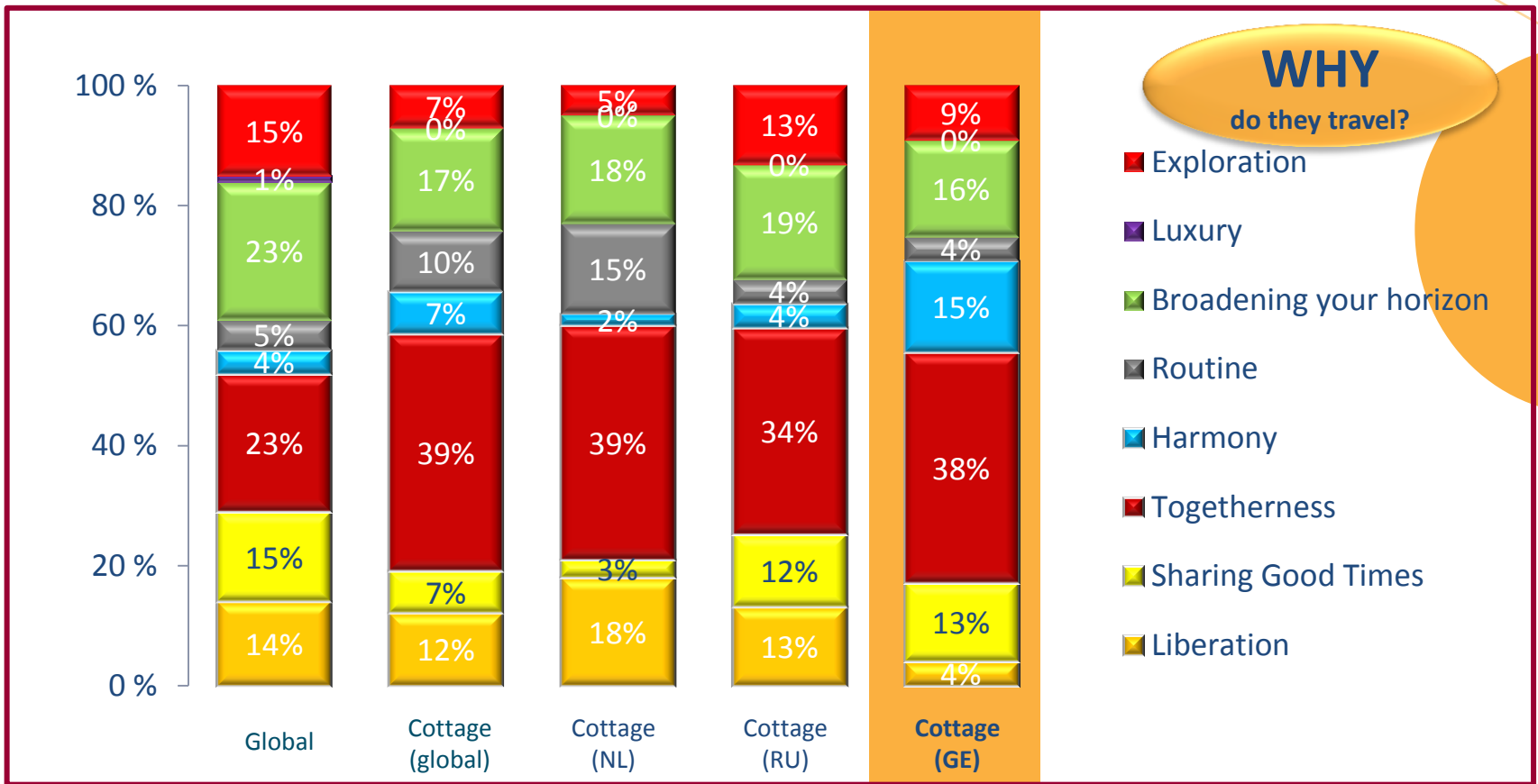
ACTIVITIES

- **Relaxation**
- Observe beauty of nature
- Taste local food and drink
- Visit the countryside
- **Shopping**

Slide shows most important items

Bold = differentiating from other holiday types

Why do people go on a Cottage holiday?



CONCLUSION

'Togetherness' is the dominant motivation. 'Broadening your Horizon', 'Harmony' and 'Exploration' are also important in Germany. Some differences in the markets – 'Routine' is quite important in the Netherlands



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