



Report for the Dutch market

August 2012

Basic motivations for going on holiday Needs based segmentation - Censydiam





Developed for: Innovation Norway





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Executive summary - Background

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



Executive summary - Main findings

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

The segments

- ⇒ The research has identified eight motivational segments; Liberation, Sharing Good Times, Togetherness, Harmony, Routine, Broadening your Horizon, Luxury and Exploration.
- Across the three markets, Norway is mostly associated in two motivational segments:
 - - Emotional benefits sought by the tourist: Gives me rich experiences, Discover new and interesting places,
 Escape from my hectic daily life and Enrich my view of the world
 - Personality of the destinations: Adventurous, Explorative, Unique, Active and Friendly
 - ⇒ Broadening your Horizon:
 - Emotional benefits sought by the tourist: Discover new and interesting places, Broaden my horizon,
 Broaden my knowledge, Enrich my view of the world and Rich experiences
 - Personality of the destinations: Friendly, Authentic, Open-minded, Relaxed and Cultivated



Executive summary - Main findings

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

- 24% of the Dutch in the sample have visited Norway, which is lower than for Sweden and Denmark.
- However Norway is the most frequently considered Scandinavian holiday destination in The Netherlands. This demonstrates that Norway has unrealised potential.
- 32% of the Dutch in the sample are considering going on holiday to Norway in the next three years.



Executive summary – Conclusions

- Despite a slightly differentiated position compared to competing destinations,
 Norway does not attract a lot of (repeat) visitors
 - ⇒ The proportion of people who have ever visited Norway is low compared to other destinations
 - ⇒ Repeat visiting is also lower than average
- Norway does not clearly 'own' any motivational segment
 - ⇒ In the Netherlands, Norway is best positioned with Exploration
 - ⇒ But the strength of this association is relatively weak



1a. Introduction

Background and who we spoke to in the research



The purpose of the research:

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



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



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

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

 Ipsos MMI

Evaluate / Confirm current direction for Norway

Cross-country

Germany

Russia

▼ The Netherlands

Choose target for each holiday type

Skiing

Sightseeing/roundtrip

City trip/city break

Camping

Experience nature

Cottage

Active holiday

We have created qualitative hypothesis

four focus groups in each country

We have validated them quantitatively

1,200 interviews online in each country

Who did we speak to:

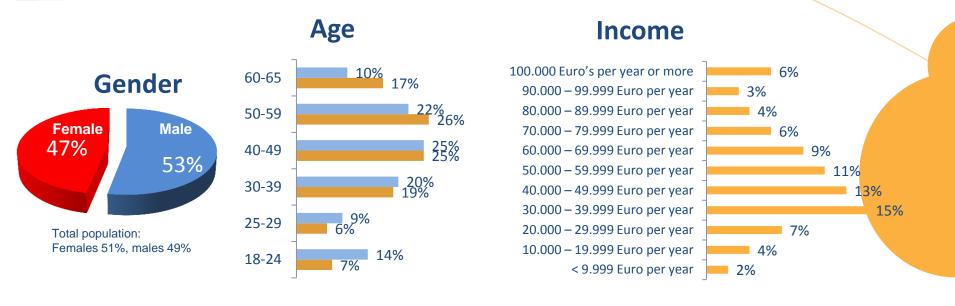
To be included in the study, the respondent had to have been on a holiday abroad that included at least three overnight stays during the past 24 months, and where the trip was <u>not</u> paid for by their employer.

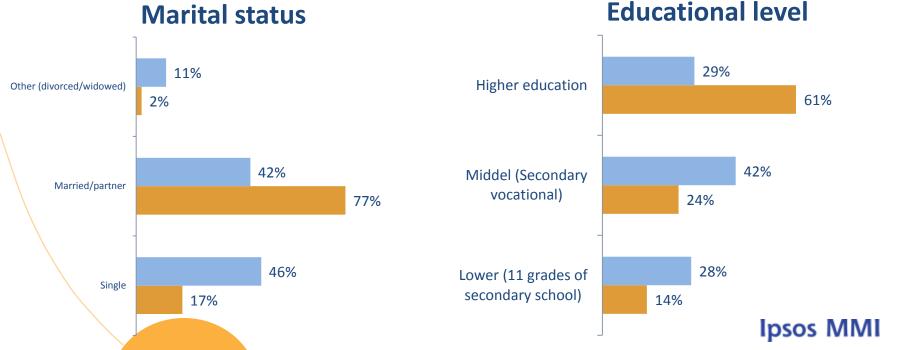
The respondent also had to be interested in going on holidays to experience either; dramatic, wild nature and beautiful scenery, or outdoor activities, e.g. skiing, hiking or cycling, or clean and unspoiled nature, or local art, culture and lifestyle.

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



Demographics of the survey sample compared with the total population







1b. Introduction

Basic motivations for going on holiday



The same person, but different situations and different motivations

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



To get inside the consumer's mind, we need to go deeper 20% Conscious

80% Sub-conscious

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

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



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



The research helps us to do this...



The Censydiam model

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





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

- The vertical axis is the personal dimension

Enjoy to the fullest Impulsive

Controlled Planned

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

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



The horizontal axis is the second dimension:

- The social dimension

Individual performance

Personal enrichment

Social Be part of something Mental relaxation

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

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



1c. Introduction

How these needs and motivations can be identified?



Background to the project

- Why do people travel?

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

- People travel abroad because the holiday or destination in some sense serves certain needs. These needs may be fundamentally physiological (e.g. a place to sleep = hotel).
- But when several options can satisfy the same need, a role for branding arises.
 People use holidays to satisfy more psychological needs and people choose types of holidays to reflect their personality, convey who they are to others, fulfil a deeper meaning in life, reinforce their own self-concept etc.
- Hence, psychological needs play an important role in consumers' decisionmaking and influence consumer behaviour.
- In this context, a brand will succeed if it addresses a psychological need better than other brands.
- Hence, stakeholders in the tourism industry need to examine their branding.
 - ⇒ What fundamental psychological need should we target?
 - How can we differentiate our brands (products/services) from our competitors'?



People don't buy products – they want to satisfy certain needs We need to shift the focus from products to the tourists (by putting people first)

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

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

Instead of product focus...



'Rorbuferie'/ holiday in a fisherman's cabin

...focus on motivational benefit



Share good times with others

...or personality



Active, explorative and adventurous

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



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

Research objective:

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



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

Want to learn more about the model and watch a intructional video, please visit our website at: 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 **<u>positioned</u>** (in relation to communication, products and service provision)

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

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



The ideal holiday

Can be explained by four different factors





Explanation of the four factors of an ideal holiday

This is about the tourist

Emotional benefits sought (emotional)

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

Personality of the destination (emotional)

- A destination (brand) personality is usually expressed as an adjective. The purpose of personality attributes is to help personify the destination, give life to it and to give it a distinctive 'brand voice'.
- ⇒ Examples: Fresh, adventurous, safe, relaxed, soothing, active etc.
- To give content to the emotional segments and measure the perception and performance of the destinations, we also asked about the activities and characteristics of destinations.

Set of activities (functional)

- ⇒ Examples: Fishing, skiing, hiking
- Destination features (functional)
 - □ Qualities and characteristics of a destination
 - ⇒ Examples: Has friendly people, has beautiful nature

This is about the destinations



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

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

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



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



2. Fundamental meaning



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



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

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

Source: Qualitative focus groups



Calvinist Culture: Understatement is the Norm

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



An Orderly Society

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









At times need to cut loose:

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









Big Idea: Progressive and Proud

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









General perspective of the role of holidays in the Dutch culture

Time spent; working vs. leisure...

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



General perspective of the role of holidays in the Dutch culture

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



General perspective of the role of holidays in the Dutch culture

Key insight from qualitative

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



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

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

The core of all holidays is about:

Escapism

New and interesting places

Being together

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

Source: Qualitative focus groups and quantitative survey



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

EMOTIONAL BENEFITS

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

WHY

are they travelling

PERSONALITY

- Relaxed
- Friendly
- Active
- Soothing
- Peaceful

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

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

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

Ipsos MMI



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

ACCOMODATION

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

TRAVEL TO DESTINATION

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

HOW

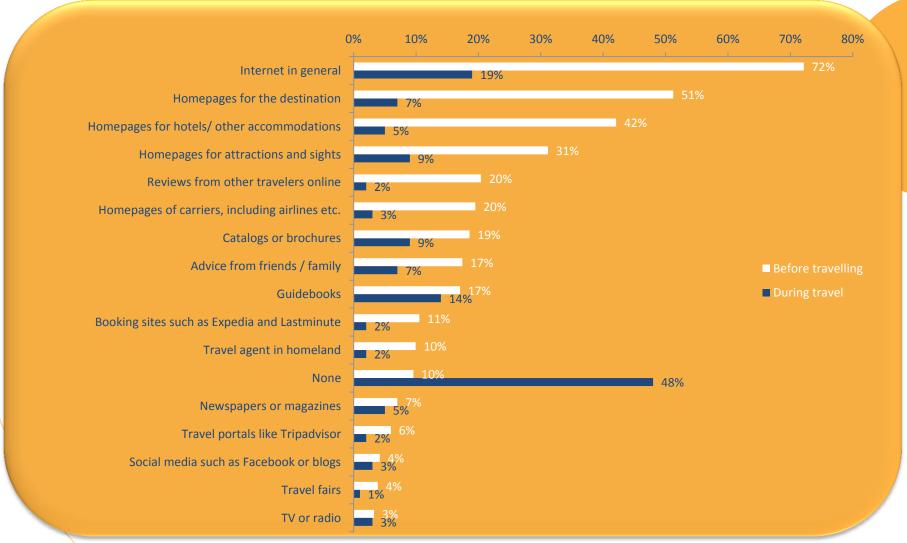
do they travel







What information sources Dutch tourists use before traveling and during the trip
Online sources are most important before the holiday, but guide books are
still the most important source during the holiday





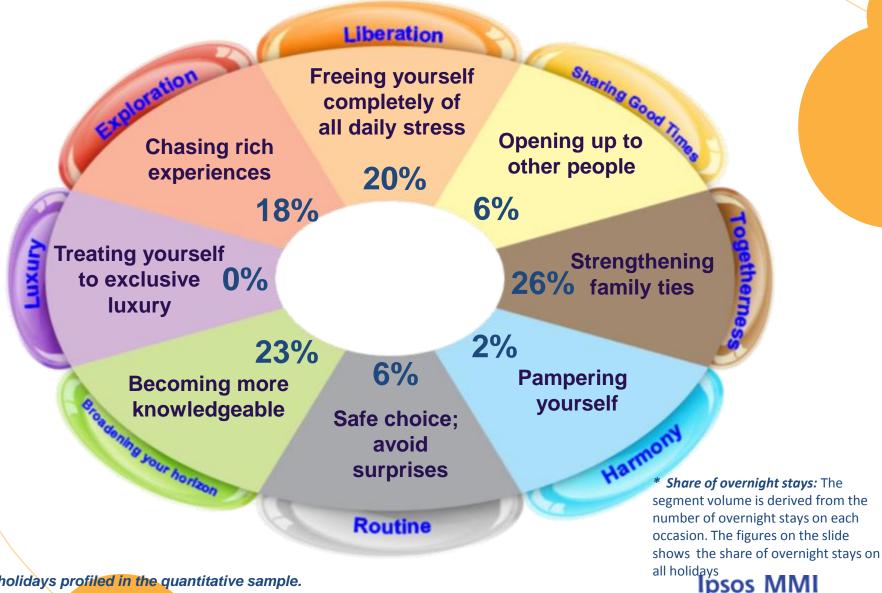
3. The segments





All the holidays reported in the Dutch sample

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



n = all holidays profiled in the quantitative sample.



Segment share by market

- All three countries – all types of holiday



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

Ipsos MMI

Summary of the segments

- Gives me rich experiences
- Discover new and interesting places
- Escape from my hectic daily
- · Enrich my view of the world

- Enjoy life to the fullest
- Feel full of energy
- Feel completely liberated
- Escape from my hectic daily life
- Come to my senses

Liberation

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

Share good times

Meet new people

Discover new and

interesting places

Escape from my hectic

local culture

daily life

· Immerse myself in the

Emotional benefits

Personality

Relaxed

Friendly

Soothing

Peaceful

Cozy

- Active
- Relaxed Friendly
- Fresh
- Soothing

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

- Escape from my hectic daily life
- Precious moments of togetherness
- Intensify the relationship with my loved one(s)
- Share good times with others
- Spoil my loved ones

Adventurous

- Explorative
- Unique
- Active
- Friendly

Luxurious

- Classy
- Extravagant
- Superior
- Indulgent

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

Predictable

- Practical
- Structured
- Relaxed
- Friendly

Cultivated

- Contemporary
- Caring
- Friendly
- Relaxed

Discover new and interesting places

Indulge in a bit of

· Feel on top of the

Show my superior

luxury

world

lifestyle

Feel special

Shows that I am

successful in life

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

world

Avoid too many surprises

- Keep everything under control
- · A safe feeling
- Escape from my hectic daily life
- Share good times

Pamper myself

- Sense of being well cared for
- · A safe feeling
- Let go without restrictions
- Escape from my hectic daily life



Summary of the segments

- Has beautiful nature
- Has interesting sights
- Has friendly people
- Allows me to have unique experiences
- · Has nature that offers opportunities for discovery
- **Observe beauty of** nature
- Taste local food and drink
- Relaxation
- Discover local culture and difestyle
- Visit restaurants

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

Relaxation

and drink

Taste local food

Visit restaurants

sightseeing tours

nature

Attend

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

Destination features

Activities

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

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

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

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

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

- people
- Has beautiful nature

Has friendly

- Is safe
- Is easy to travel to
- · Is easy to travel around

- Taste local food and drink
- Visit historical buildings/sites
- Visit cities
- Attend sightseeing tours Has interesting sights
- - Discover local culture and lifestyle Sysur horizon
- Relaxation
 - Visit restaurants
 - Taste local food and drink
 - Visit cities
 - Observe beauty of nature
- Taste local food and drink

Ha

- Visit restaurants
- Relaxation
- Shopping
- Visit cities

Has interesting culture and art

- Has friendly people
- · Has beautiful nature
- · Has rich cultural heritage

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

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



4. Assessment of Norway

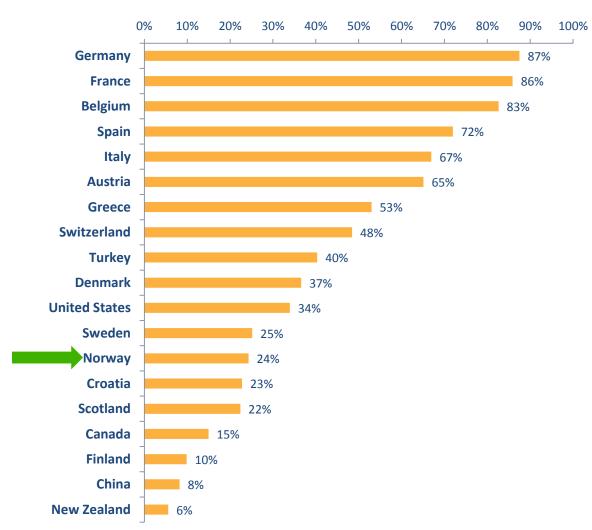




Where do The Dutch go?

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

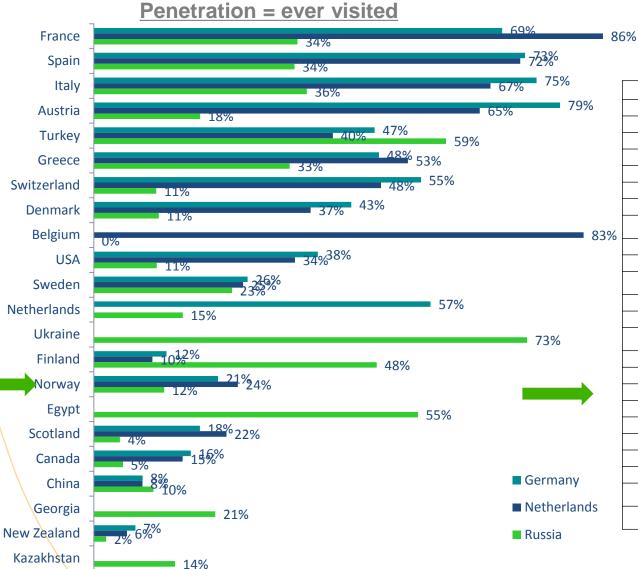
Penetration = ever visited





Norway as a tourist destination – Accross the three countries

More German and Dutch people have visited Norway than Russians



Repeat visits (twice or more...)

Repeat visits (twice of more)						
	Total Germany Netherlands		Russia			
France	71%	63%	8 <mark>5%</mark>	37%		
Spain	71%	82%	73%	37%		
Italy	64%	75%	65%	34%		
Austria	70%	78%	69%	27%		
Turkey	56%	62%	48%	59%		
Greece	51%	54%	5 <mark>6%</mark>	32%		
Germany			82%	47%		
Switzerland	52%	50%	56%	28%		
Denmark	44%	50%	40%	28%		
Belgium			81%			
USA	53%	54%	51%	48%		
Croatia	36%	47%	31%	20%		
Sweden	37%	38%	37%	36%		
Netherlands		58%		35%		
Ukraine				87%		
Finland	53%	30%	19%	70%		
Norway	35%	33%	38%	25%		
Egypt				59%		
Scotland	34%	35%	32%	37%		
Canada	34%	30%	36%	35%		
China	34%	39%	30%	33%		
Georgia				48%		
New Zealand	31%	35%	22%	46%		
Kazakhstan				43%		

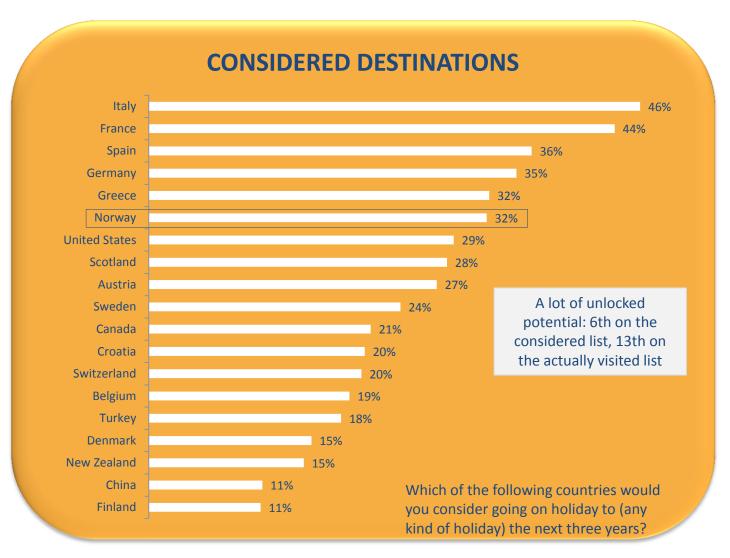
Average accross all holidays in the three countries: 53%

Ipsos MMI



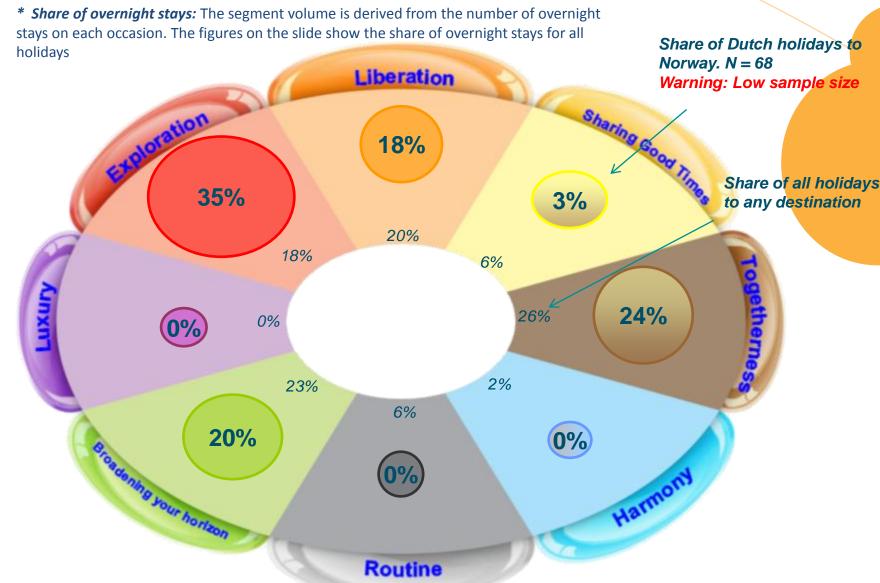
Considered destinations in Holland

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





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



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



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

WHAT

are Norway perceived as?

DESTINATION FEATURES

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

ACTIVITIES

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

EMOTIONAL BENEFITS

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

WHY

go to Norway

PERSONALITY

- Adventurous
 - Active
 - Peaceful
 - Soothing
 - Fresh



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

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

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

Emotional benefits		
(n=1180)	%	Index
Allows me to discover new and interesting places	62,8	110
Helps me to escape from my hectic daily life	58,4	113
Gives me rich experiences	51,3	104
Allows me to broaden my horizon	46,6	104
Enriches my view on the world	46,4	99

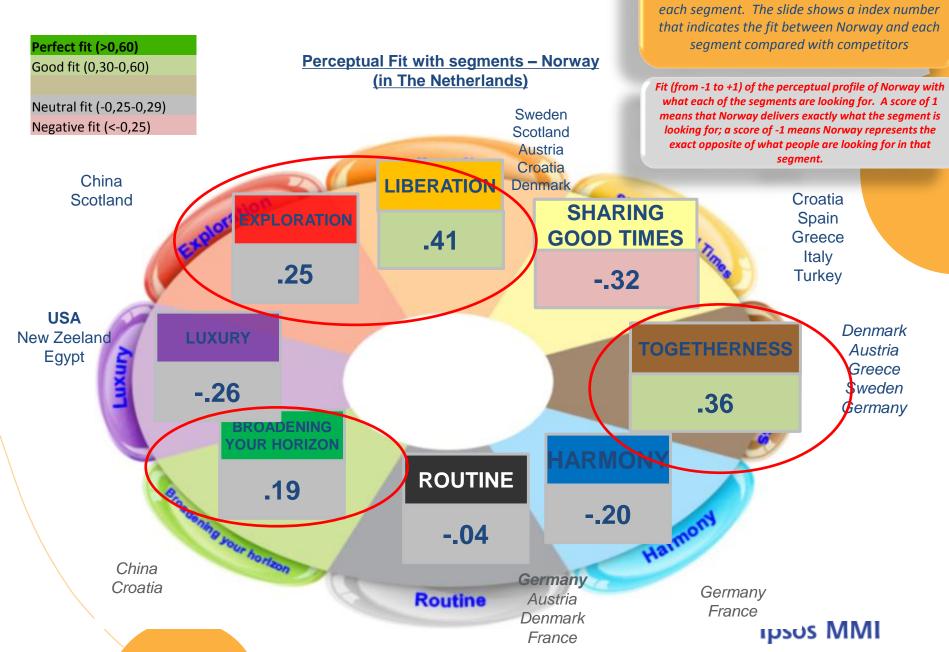
Personality		
(n=1180)	%	Index
Adventurous	59,8	124
Active	58,9	126
Peaceful	56,2	136
Soothing	51,6	139
Fresh	51,2	174

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

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



Norway has a fragmented brand footprint



Instead of just looking at the overall perception

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

perception of Norway to their dominant idea of



Perception of Destinations – summary NETHERLANDS

Perfect fit (>0,60)

Good fit (0,30-0,60)

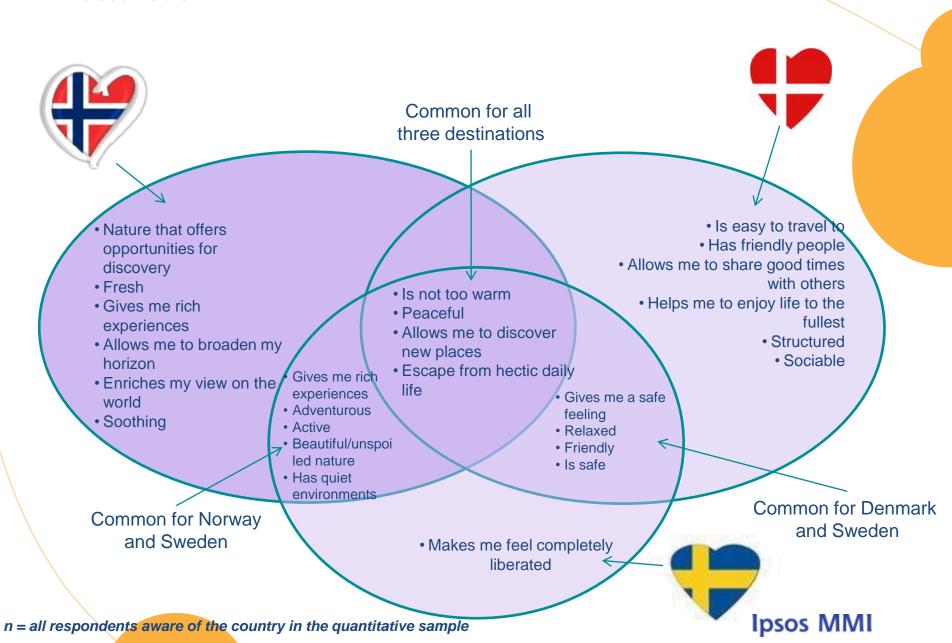
Neutral fit (-0,25-0,29)

Negative fit (<-0,25)

	110841110 111 (10)25/				, ,			
	Liberation	Sharing Good Times	Togetherness	Harmony	Routine	Broadening your horizon	Luxury	Exploration
Austria	0,35	-0,30	0,56	0,16	0,61	-0,28	-0,35	-0,40
Canada	0,06	-0,22	-0,08	-0,11	-0,20	0,06	0,09	0,23
China	-0,29	0,10	-0,50	-0,28	-0,50	0,35	0,28	0,47
Croatia	0,34	0,48	0,33	0,04	-0,22	0,34	-0,48	0,25
Denmark	0,31	-0,12	0,58	0,12	0,59	0,00	-0,51	-0,34
Egypt	-0,42	0,00	-0,44	-0,08	-0,30	0,15	0,34	0,25
Finland	0,23	-0,28	0,10	-0,14	-0,12	-0,04	0,04	0,12
France	0,00	-0,03	0,28	0,30	0,50	-0,28	-0,16	-0,49
Germany	0,01	-0,14	0,34	0,33	0,82	-0,25	-0,33	-0,55
Greece	0,18	0,40	0,50	0,23	0,10	0,07	-0,45	-0,18
Italy	-0,26	0,34	-0,18	0,25	-0,18	-0,18	0,28	-0,32
New Zealand	-0,06	-0,30	-0,27	-0,26	-0,46	-0,07	0,44	0,28
Norway	0,41	-0,32	0,36	-0,20	-0,04	0,19	-0,26	0,25
Spain	0,04	0,41	0,23	0,27	0,34	-0,15	-0,29	-0,39
Sweden	0,45	-0,28	0,50	-0,04	0,22	-0,01	-0,34	-0,05
Switzerland	0,06	-0,45	0,20	0,14	0,33	-0,25	0,06	-0,31
Turkey	0,07	0,32	0,27	0,29	0,07	0,08	-0,33	-0,14
United States	-0,50	0,10	-0,72	0,01	-0,18	-0,31	0,65	-0,09
Scotland	0,41	-0,15	0,34	-0,19	-0,35	0,14	-0,20	0,40



Destination features and activities respondents associate with each destination





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



GLOBAL CONCLUSIONS



Key Conclusions - Across all three markets

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

- Norway fails to attract a lot of visitors
 - ⇒ The share of people that have ever visited Norway is low compared to other destinations.
 - ⇒ Repeat visiting is also lower than average.
- Norway has a fragmented brand footprint and does not clearly 'own' any motivational segment.

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



5b. Key Conclusions & Recommendations



The Netherlands

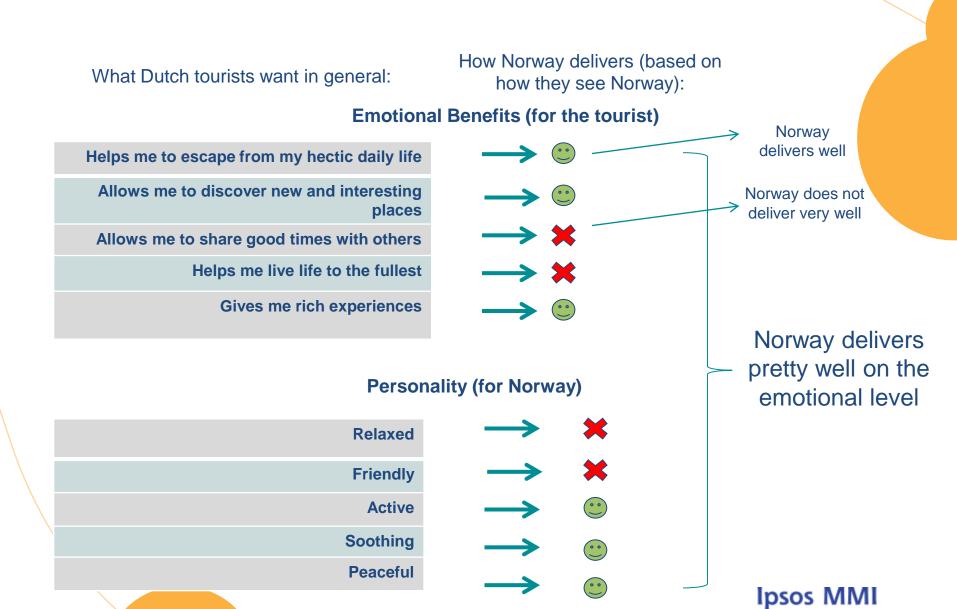


Key conclusions - The Netherlands

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

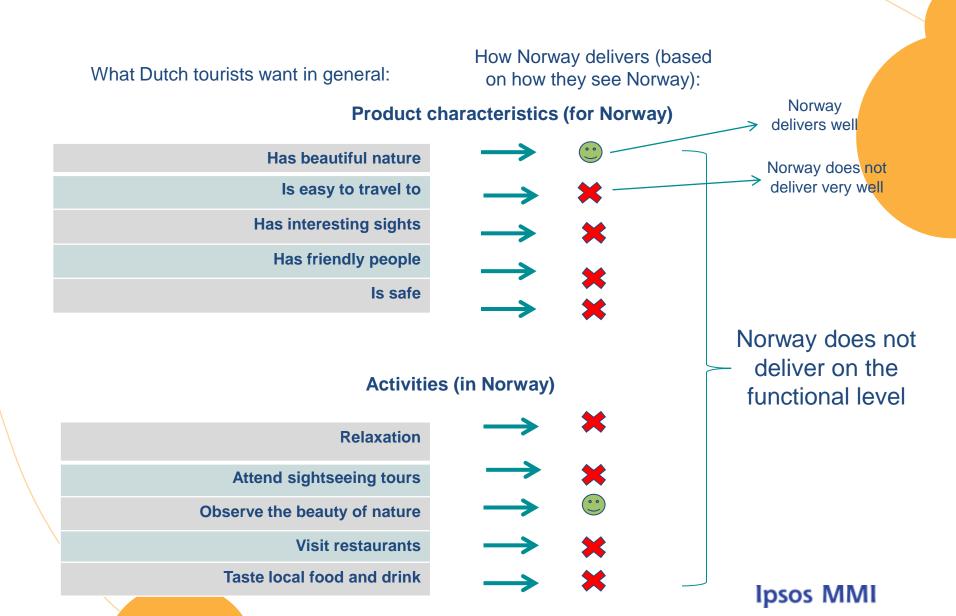


Key Conclusions – The Netherlands





Key Conclusions and Recommendations – Netherlands





Key Conclusions – Netherlands

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

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

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

 - ⇒ Portray friendly 'Scandinavian' people



Key Conclusions – Netherlands

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



Key Conclusions – Netherlands

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

Exploration

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





Appendix

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



A) Description of each segment



Liberation

Description



LIBERATION

- Active and fresh



Segment core:

- The basic motivation for going on holidays is to live life to the fullest. Makes me feel full of energy and completely liberated.
- It is active, soothing and fresh.

Most important differentiators:

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

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



LIBERATION

- Active and fresh



Who:

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

How do they travel:

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

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



Sharing Good Times

Description

Sharing Good Times

- Sociable, relaxed and friendly





Segment core:

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

Most important differentiators:

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

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

Sharing Good Times

- Sociable, relaxed and friendly



Who:

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

How do they travel:

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

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



Togetherness

Description

TOGETHERNESS

Relaxed, friendly, soothing, peaceful and cozy





Segment core:

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

Most important differentiators:

- Personality:
 - Relaxed
 - Friendly
 - Soothing
 - Peaceful
 - Cozy
- · Emotional benefits:
 - Helps me escape from my hectic daily life
 - · Creates precious moments of togetherness
 - Allows me to intensify the relationships with my loved one(s)
 - Allows me to share good times with others
 - Allows me to spoil my loved ones

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

TOGETHERNESS

- Relaxed, friendly, soothing, peaceful and cozy



Who:

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

How do they travel:

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

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



Harmony

Description

Harmony

- Cultivated, contemporary and caring

Segment size 2%



Segment core:

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

Most important differentiators:

- Personality:
 - Friendly
 - Contemporary
 - Relaxed
 - Cultivated
 - Caring
 - Soothing
- Emotional benefits:
 - · Allows me to pamper myself
 - Give me a sense of being well cared for
 - · Gives me a safe feeling
- Destination characteristics:
 - Is easy to travel to
 - Is safe
 - Has good service
 - · Has friendly people
 - Has interesting sights

Activities:

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

Harmony

- Cultivated, contemporary and caring



Who:

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

How do they travel:

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

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



Routine

Description

Routine

- Predictable, practical and structured





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

Most important differentiators:

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

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

Routine

- Predictable, practical and structured



Who:

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

How do they travel:

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

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



Broadening your horizon

Scorecards

Broadening your horizon

- Friendly, authentic and open-minded



Segment core:

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

Most important differentiators:

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

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

Broadening your horizon

- Authentic, open-minded and cultivated



Who:

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

How do they travel:

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

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



Luxury

Scorecards

HAS TO FEW INTERVIEWS TO BE REPORTED IN DETAIL

Luxury

- Luxurious, classy and indulgent



Segment core:

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

Most important differentiators:

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

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



Exploration

Scorecards

Exploration

- Adventurous, explorative, active and unique

Segment core:

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

Most important differentiators:

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

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

Exploration

- Adventurous, explorative, active and unique

Who:

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

How do they travel:

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

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



b) Competing destinations

Common ground analysis



Comparison Austria vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Adventurous
Common ground	Active Peaceful Soothing Fresh
Unique to Austria	Cozy Practical

Scorecard -Austria

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

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

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

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



Comparison Canada vs. Norway (Dutch base)

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

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

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

	Personality	
Unique to Norway	Harmonious Classy	
Common ground	Adventurous Active Peaceful Fresh Soothing	
Unique to Canada	Friendly Unique Practical	



Scorecard - Canada

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

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

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

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



Comparison Denmark vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Adventurous Active Soothing
Common ground	Peaceful Fresh Structured Harmonious
Unique to Denmark	Friendly Sociable Practical



Scorecard - Denmark

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

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

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

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





Comparison Finland vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Active Structured
Common ground	Adventurous Peaceful Soothing Fresh
Unique to Finland	Relaxed Unique



Scorecard - Finland

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

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



Comparison New Zealand vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Structured Harmonious
Common ground	Adventurous Active Peaceful Soothing Fresh
Unique to New Zealand	Unique Explorative

lpsos /

Scorecard - New Zealand

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

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

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

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



Comparison Scotland vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Structured Harmonious
Common ground	Adventurous Active Peaceful Soothing Fresh
Unique to Scotland	Authentic Unique Explorative



Scorecard - Scotland

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

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

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

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



Comparison Sweden vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Adventurous
Common ground	Active Peaceful Soothing Fresh
Unique to Sweden	Sociable Caring



Scorecard - Sweden

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

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

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

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





Comparison Switzerland vs. Norway (Dutch base)

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

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



Scorecard - Switzerland

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

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

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

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



Comparison United States vs. Norway (Dutch base)

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

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

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

	Personality
Unique to Norway	Active Peaceful Soothing Fresh
Common ground	Adventurous
Unique to United States	Contemporary Explorative Outgoing



Scorecard - United States

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

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



C) Overall positioning & targeting

Holiday types



Segments share of occasion – all markets - all destinations

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

Ipsos MMI



Segments share of occasion – Holland - all destinations

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

Ipsos MMI



Ski holiday – Dutch tourists

N=229





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

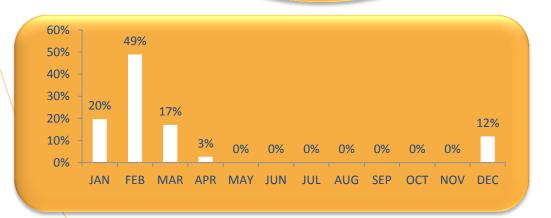




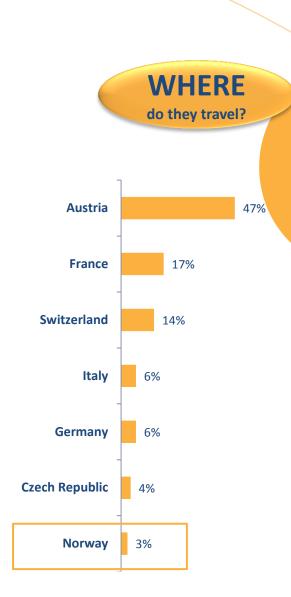
DEMOGRAPHICS

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

WHEN do they travel?



Average length of stay: 8 days





HOW

do they travel?

ACCOMODATION

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

TRAVEL TO DESTINATION

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

WITH WHOM

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

PLANNING & ORGANISATION

Mostly organized individually





WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Active
- Relaxed
- Friendly
- Fresh
- Adventurous

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

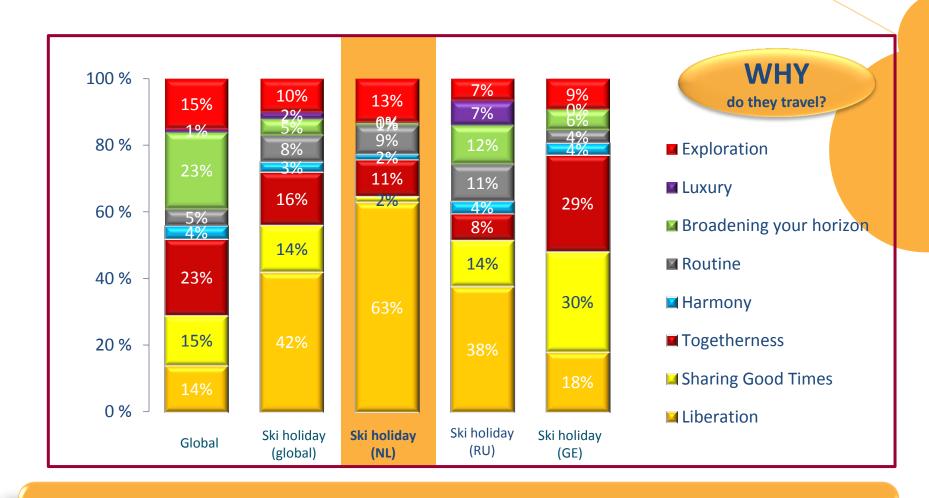
- Experience mountains
- Alpine skiing/snowboarding
 - Relaxation
- Observe beauty of nature
 - Visit restaurants

Slide shows most important items

Bold = differentiating from other holiday types



Why do Dutch go on a ski holiday?



CONCLUSION:

Liberation is the dominant motivation to go skiing.

Ipsos MMI



Liberation

Freeing yourself completely of all daily hassles

Why?

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

Key competition

- THE ALPS
- Mainly Austria

Leveraging brand Norway

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



Sightseeing/roundtrip – Dutch tourists

N = 561





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



Sightseeing/roundtrip Details



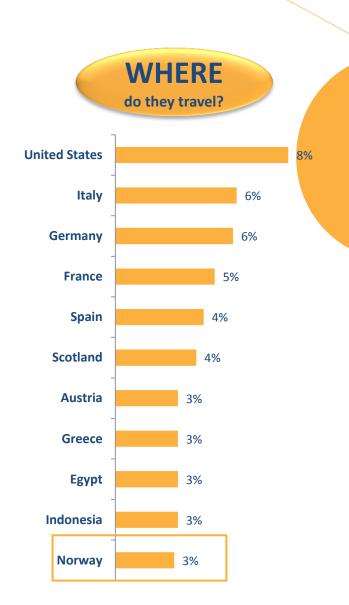
DEMOGRAPHICS

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

WHEN do they travel?



Average length of stay: 16 days



Ipsos MMI



HOW

do they travel?

ACCOMODATION

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

Mostly with spouse/partner (70%)

WITH WHOM

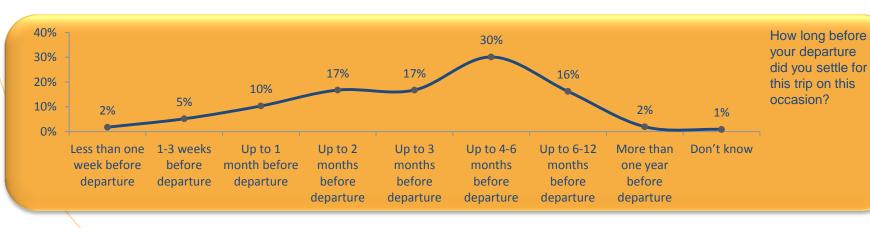
- Friends (18%)
- Less with children

TRAVEL TO DESTINATION

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

PLANNING & ORGANISATION

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



WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Relaxed
- Friendly
- Adventurous
 - Active
 - Unique

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

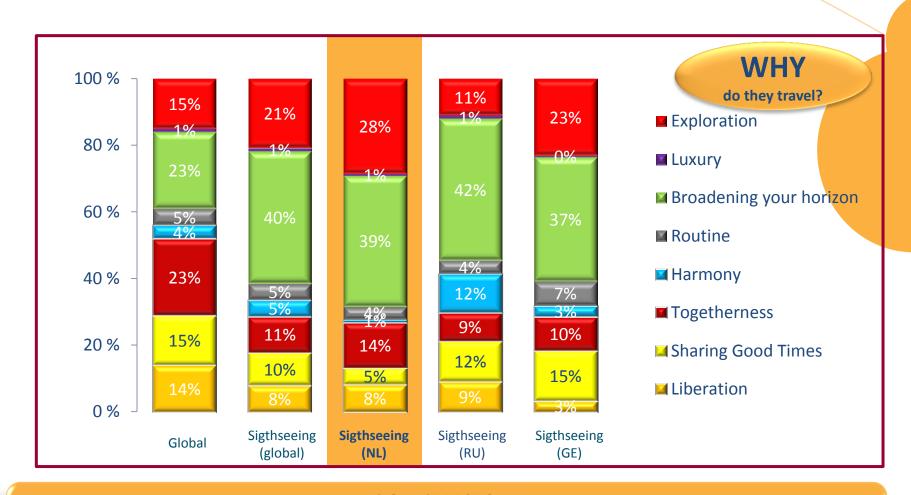
- Attend sightseeing tours
- Observe beauty of nature
- Discover local culture and lifestyle
 - Visit historical buildings/sites
 - Relaxation

Slide shows most important items

Bold = differentiating from other holiday types



Why do people go on a sightseeing/roundtrip?



CONCLUSION:

Broadening your horizon is the dominant motivation for sightseeing. Other relevant motivation in Holland is Exploration. Broadening your horizon dominates in all markets.



City trip/city break – Dutch tourists

N=208





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





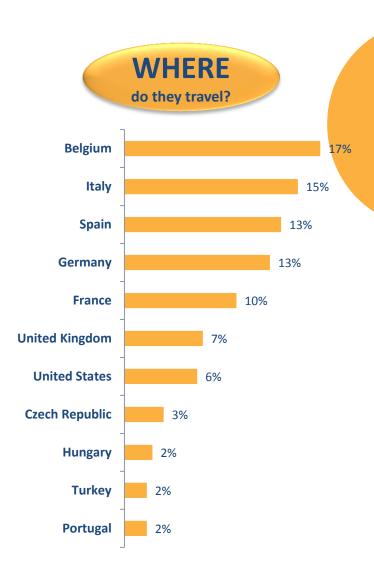
DEMOGRAPHICS

- Dominated by people aged 40-59 (53%)
- People 30-65 years constitutes 84% of the travelers
- Slightly more females (53%)
- 43% of the travelers have a household income of 50.000 Euros or more. 6% makes 100.000 Euro's per year or more

WHEN do they travel?



Average length of stay: 6 days





HOW

do they travel?

ACCOMODATION

 Hotel accommodation 87% share (medium standard 56%)

TRAVEL TO DESTINATION

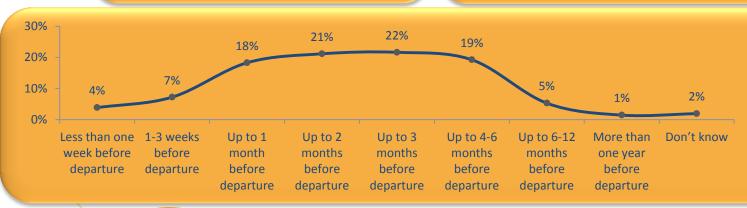
- Dominated by scheduled plane (39%) and car (38%)
 - Train (20%)

WITH WHOM

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

PLANNING & ORGANISATION

Mostly self organized



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

WHY

do they travel?

EMOTIONAL BENEFITS

- Allows me to discover new and interesting places
 - · Allows me to broaden my knowledge
 - Allows me to share good times with others
 - Gives me rich experiences
 - · Enriches my view on the world

PERSONALITY

- Relaxed
- Friendly
- Active
- Contemporary
 - Cultivated

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

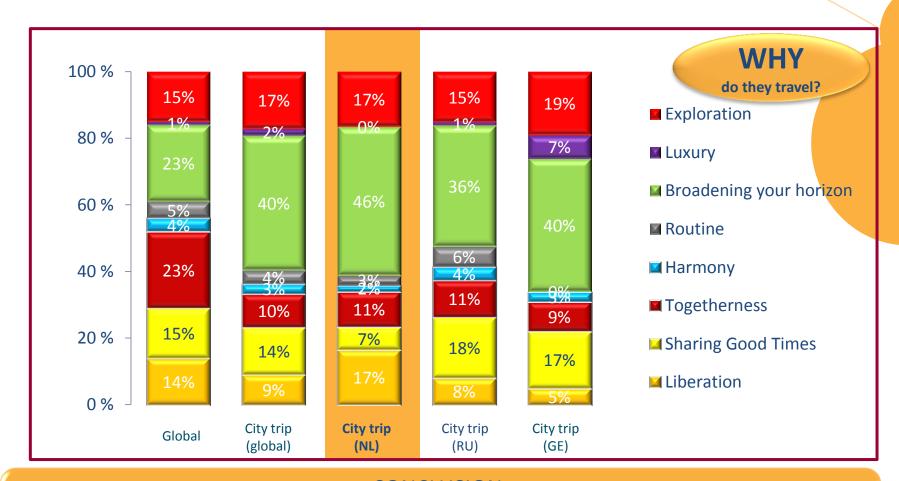
- Attend sightseeing tours
 - Visit cities
 - Visit restaurants
- Visit historical buildings/sites
 - Shopping

Slide shows most important items

Bold = differentiating from other holiday types



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



CONCLUSION:

Broadening your horizon is by far the main motivation. Other motivations are Exploration and sharing good times. The same is the case for all markets, except for Netherlands where Sharing good times has a lower share and Liberation plays a more important role.



Holiday to experience nature – Dutch tourists

N= 142





- 5W profile
- Motivations for Holiday to experience nature
- Role of Norway versus competitive landscape
 - destination versus motivation within Holiday to experience nature
 - Who is coming today?



Holiday to experience nature Details



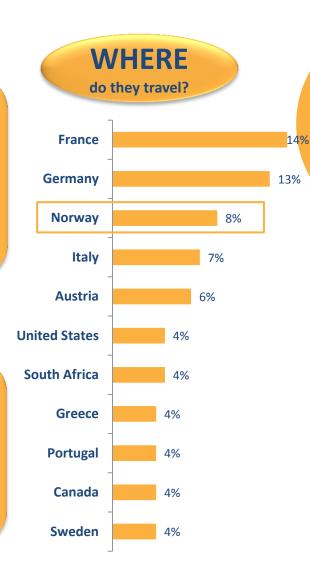
DEMOGRAPHICS

- Dominated by people aged 40-59 (56%)
- People 30-65 years constitutes 93% of the travelers
- Slightly more males (54%)
- 33% of the travelers have a household income of 50.000 Euros or more. 2% makes 100.000 Euro's per year or more

WHEN do they travel?



Average length of stay: 15 days





Holiday to experience nature Details

HOW

do they travel?

ACCOMODATION

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

TRAVEL TO DESTINATION

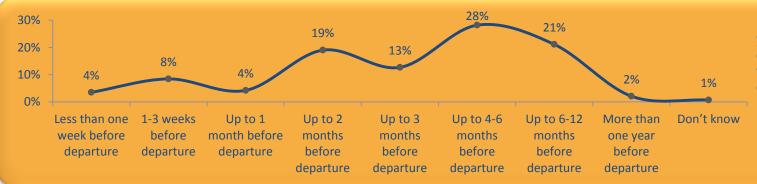
- Dominated by car (73%)
- Scheduled plane (25%)

WITH WHOM

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

PLANNING & ORGANISATION

Mostly self organized



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

Holiday to experience nature Details

WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Relaxed
- Active
- Adventurous
 - Friendly
 - Unique

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

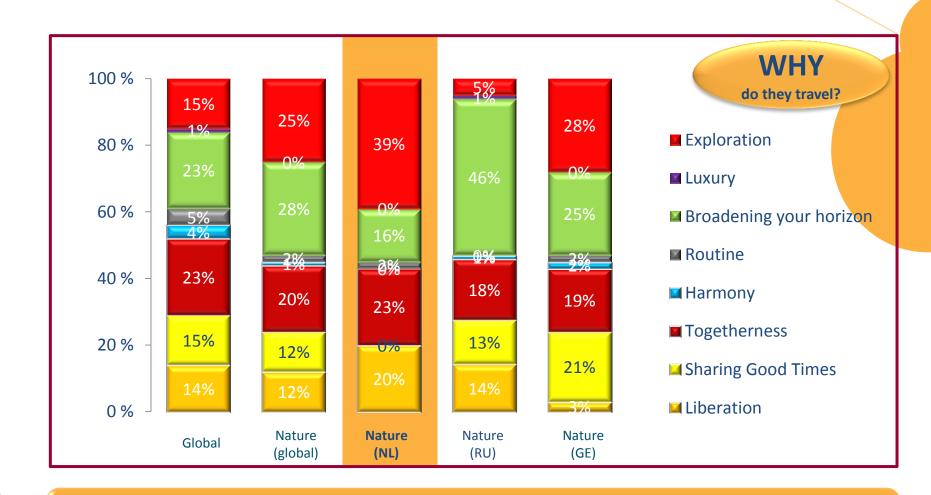
- Observe beauty of nature
 - Relaxation
- Hiking (less than two hours)
 - Attend sightseeing tours
 - Experience mountains

Slide shows most important items

Bold = differentiating from other holiday types



Why do people go on a Holiday to experience nature?



CONCLUSION:

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



Camping holiday – Dutch tourists

N= 300





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

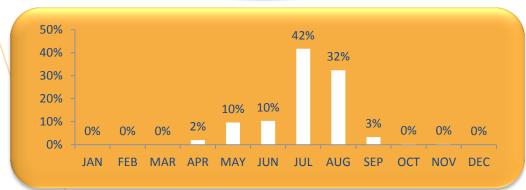




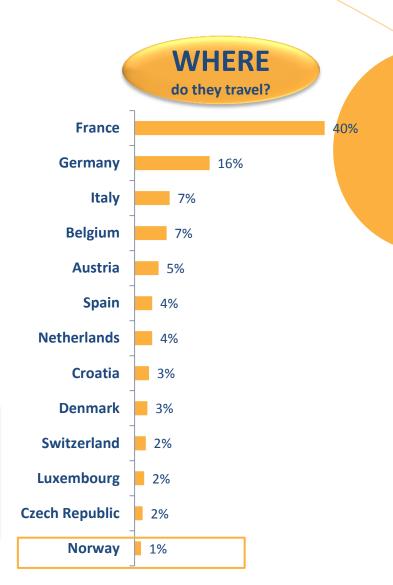
DEMOGRAPHICS

- Dominated by people above 30 (91%)
- People 40-65 years constitutes 70% of the travelers
- 31% of the travelers have a household income of 50.000 Euros or more. 4% makes 100.000 Euro's per year or more

WHEN do they travel?



Average length of stay: xx days





HOW

do they travel?

ACCOMODATION

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

TRAVEL TO DESTINATION

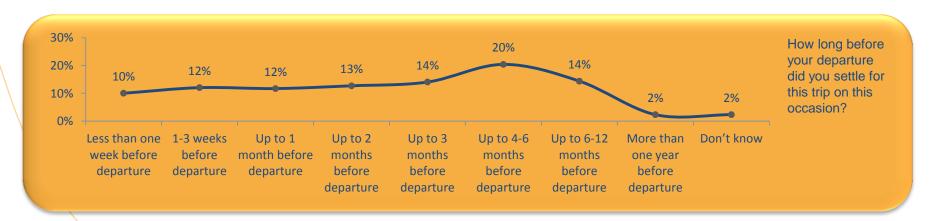
- Car dominates (64%)
- Car with caravan (28%)

WITH WHOM

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

PLANNING & ORGANISATION

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



WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Relaxed
- Friendly
 - Active
- Sociable
- Soothing

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

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

ACTIVITIES

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

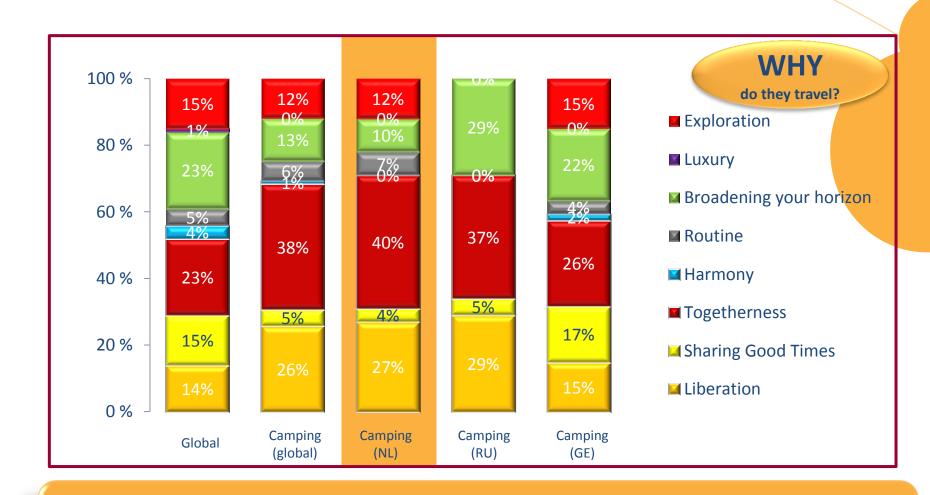
Slide shows most important items

Bold = differentiating from other holiday types

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Why do people go on a Camping Holiday?



CONCLUSION (low bases for Russia):

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



Cottage holiday – Dutch tourists

N = 294





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

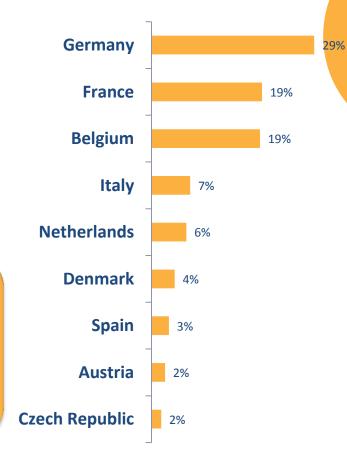


WHO travels

DEMOGRAPHICS

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

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



WHERE

do they travel?

Average length of stay: 10 days



HOW

do they travel?

ACCOMODATION

Rented or borrowed cabin / holiday home / flat

TRAVEL TO DESTINATION

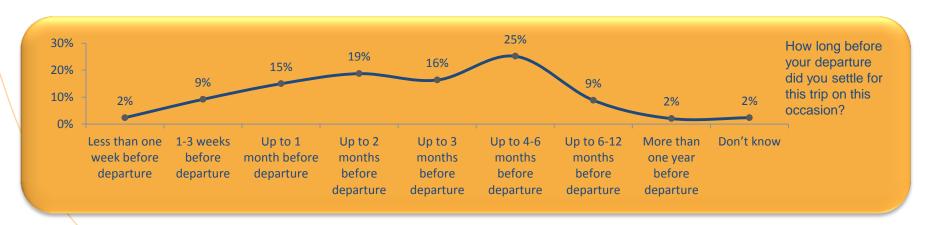
• Dominated by car (96%)

WITH WHOM

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

PLANNING & ORGANISATION

Almost exclusively organized by themselves



WHY

do they travel?

EMOTIONAL BENEFITS

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

PERSONALITY

- Relaxed
- Friendly
- Peaceful
- Soothing
 - Cozy

WHAT

are they looking for?

PRODUCT CHARACTERISTICS

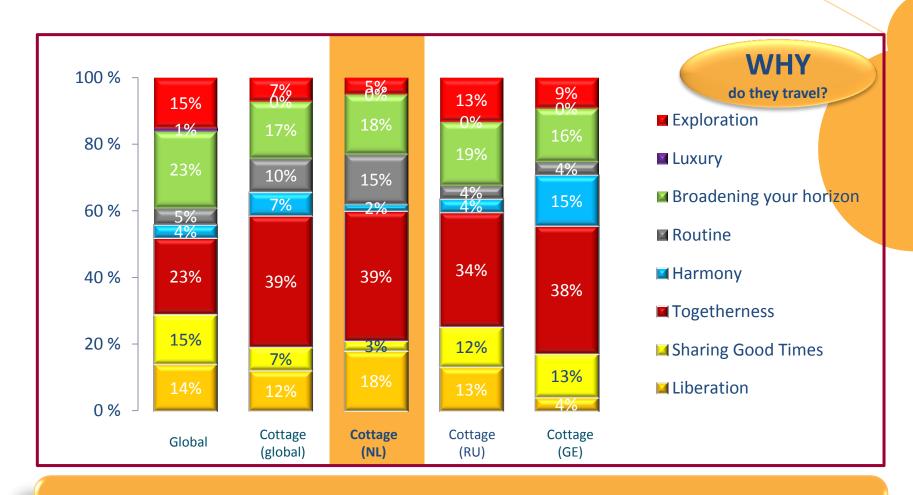
- Is easy to travel to
- Has beautiful nature
 - Is safe
- Is easy to travel around
- Has quiet environments

ACTIVITIES

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



Why do people go on a Cottage holiday?



CONCLUSION

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





Ipsos MMI

Kjetil T. Strømseth Senior Consultant Ipsos Marketing

Po. Box 9143 Grønland 0133 OSLO

Mob: 93452000

eMail: <u>kjetil.stromseth@ipsos.com</u>

Steven Naert
Consumer Insights Director, Censydiam
Ipsos Marketing

Grote Steenweg 110, 2600 Antwerp, Belgium

Mob: +32 497 70 64 57

eMail: steven.naert@ipsos.com