Optima report Germany
Short version

Vi gir lokale ideer globale muligheter
Background to the Optima studies

- Over the years, Innovation Norway has conducted several Optima studies across different markets. The main objective of these studies is to get a better understanding of Norway’s key markets. This insight is used in both marketing and product development to be able to work more efficient and targeted.

- This study is conducted using Censydiam, a tool for identifying main motivations and needs for travelling abroad on holiday. The research also identify the role of holidays in people’s life, their perception of Norway as a tourist destination and the competitive landscape. We have also defined a target group for Norway based on this research.

- The research was conducted in Germany, Russia (Moscow and St. Petersburg) and the Netherlands in 2011/2012.

- We have conducted four focus groups and 1,200 web interviews in each country with respondents that have been on holiday abroad during the last two years.

For more info about the survey:
http://www.innovasjonnorge.no/Reiseliv/Markedsdata/Optima-Nederland/
Executive summary

• Fundamental meaning of going on holiday - Holidays abroad must always help people to escape from their daily lives! The core of all holidays is about escapism, discovering new and interesting places and being together. All holidays must fulfil these criteria regardless of the type of holiday.

• The proportion of people who have ever visited Norway is low compared to neighboring countries. However, Norway is the most frequently considered Scandinavian holiday destination in Germany. This demonstrates that Norway has unrealized potential.

• All the Scandinavian countries are seen as expensive and to have environmentally friendly offers. Norway is also seen have unspoilt nature, natural phenomenon and wilderness. Norway is seen to be less social than Sweden and Denmark.

• Norway does not have a good fit with any of the motivational segments identified in the study, but is best positioned in the exploration and broadening my horizon segment.

• The main target group for Norway is Explorers. They are looking to discover new territories and gain new energy. At the same time, broadening their horizons and feeling enriched.
In the research, we found that there are some common denominators across all types of holidays and across all segments and markets:

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

The core of all holidays is about:

- Escapism
- New and interesting places
- Being together

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

**Source:** Qualitative focus groups and quantitative survey
Why identifying main motivation for travelling?

The same person, but different situations and different motivations

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

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

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

Main motivation for travelling abroad

We have identified eight motivational segments. They represent the different basic motivations for why people go on holidays.
Norway is best positioned with Exploration and Broadening my horizon

- Norway does not clearly 'own' any motivational segment
- Versus key competitors, Norway is not doing well on Togetherness
- Norway does have a leading position in Exploration and Broadening my Horizon, and our key competitors also have a weak association for these 2 segments
- Across the other markets researched Norway is also often associated with Exploration and Broadening my Horizon
  - But the strength of this association for Norway is also relatively weak
- **Exploration:**
  - Emotional benefits sought by the tourist: Gives me rich experiences, Discover new and interesting places, Escape from my hectic daily life and Enrich my view of the world
  - Personality of the destinations: Adventurous, Explorative, Unique, Active and Friendly
- **Broadening my 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
Versus key competitors, Norway is not doing well on Togetherness, but does have a leading position in Exploration and Broadening my Horizon.

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

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

Perfect fit (>0,60)  
Good fit (0,30-0,60)  
Neutral fit (-0,25-0,29)  
Negative fit (<-0,25)
Regional differences but Norway fails to attract a lot of German visitors...

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

n = all respondents aware of the country in the quantitative sample
Considered destinations in Germany

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

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

- Spain: 49%
- Italy: 45%
- United States: 38%
- Greece: 36%
- Austria: 34%
- Norway: 34%
- France: 34%
- Croatia: 32%
- Scotland: 32%
- Canada: 30%
- Sweden: 30%
- New Zealand: 28%
- Turkey: 28%
- Switzerland: 24%
- Denmark: 24%
- Netherlands: 22%
- Finland: 18%
- China: 11%

A lot of unlocked potential: 6th on the considered list, 13th on the actually visited list

n = all respondents aware of the country in the quantitative sample
The German’s perception of Norway as a holiday destination
This is irrespective of segments or what type of holiday in Norway the prefer or consider

DESTINATION FEATURES
(functional)
- Has beautiful nature
- Has nature that offers opportunities for discovery
- Is not too warm
- Has unspoiled nature
- Has quiet environments

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

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

PERSONALITY
(emotional)
- Peaceful
- Friendly
- Authentic
- Active
- Soothing
Travel behavior vs. perception of Norway

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

**BEHAVIOUR**
- How the Germans travel

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>Norway %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing/round trip</td>
<td></td>
</tr>
<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td></td>
</tr>
<tr>
<td>Fishing holiday</td>
<td></td>
</tr>
<tr>
<td>Cruise holiday</td>
<td></td>
</tr>
<tr>
<td>Hiking holiday</td>
<td></td>
</tr>
<tr>
<td>Summer holiday/main holiday/annual leave</td>
<td></td>
</tr>
<tr>
<td>City trip/city break</td>
<td></td>
</tr>
<tr>
<td>Ski holiday</td>
<td></td>
</tr>
<tr>
<td>Cottage holiday (hired/own/borrowed cottage/home)</td>
<td></td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td></td>
</tr>
<tr>
<td><strong>All holidays</strong></td>
<td></td>
</tr>
</tbody>
</table>

**PERCEPTION**
- Suitable for Norway as a destination

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>Norway %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday to experience nature, scenery and wildlife</td>
<td>69 %</td>
</tr>
<tr>
<td>Fishing holiday</td>
<td>65 %</td>
</tr>
<tr>
<td>Cottage holiday</td>
<td>59 %</td>
</tr>
<tr>
<td>Hiking holiday</td>
<td>58 %</td>
</tr>
<tr>
<td>Backpacking</td>
<td>50 %</td>
</tr>
</tbody>
</table>

Norway N=54 – Warning: Low sample size for trips to Norway
All holidays & Perception N = All holidays to any destination in the quantitative sample
Norway delivers pretty well on the emotional level

What German tourists want in general:

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

Emotional Benefits (for the tourist):

Norway does not deliver very well

Norway delivers well

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

Personality (for Norway):

- Friendly
- Relaxed
- Harmonious
- Active
- Peaceful
### What German tourists want in general:

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

### Product characteristics (for Norway):

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has friendly people</td>
<td>✗</td>
</tr>
<tr>
<td>Has beautiful nature</td>
<td>😊</td>
</tr>
<tr>
<td>Has interesting sights</td>
<td>✗</td>
</tr>
<tr>
<td>Offers a wide range of activities</td>
<td>✗</td>
</tr>
<tr>
<td>Is easy to travel around</td>
<td>✗</td>
</tr>
</tbody>
</table>

### Activities (in Norway):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste local food and drink</td>
<td>✗</td>
</tr>
<tr>
<td>Relaxation</td>
<td>✗</td>
</tr>
<tr>
<td>Visit restaurants</td>
<td>✗</td>
</tr>
<tr>
<td>Observe the beauty of nature</td>
<td>😊</td>
</tr>
<tr>
<td>Visit cities</td>
<td>✗</td>
</tr>
</tbody>
</table>

---

### General:

- Norway does not deliver very well on the functional level.

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

- Norway delivers well for:
  - Has beautiful nature

- Norway does not deliver well for:
  - Has friendly people
  - Has interesting sights
  - Offers a wide range of activities
  - Is easy to travel around
  - Taste local food and drink
  - Relaxation
  - Visit restaurants
  - Visit cities

---

**Norway does not deliver on the functional level**
Competitor analysis - Comparison between Norway, Denmark and Sweden

Common for all three destinations
- Has unspoiled nature
- Allows me to broaden my horizon
- Enriches my view of the world
- Observe natural phenomenon
- Experience the wilderness
- Do winter activities
- Active

Positive and distinguishing features for Norway
- Unspoiled nature
- Offers environmentally friendly offers
- Allows me to share good times with others
  - Cozy
  - Cycling
  - Sailing
- Is not too warm
- Is expensive
- Has beautiful nature
- Has quiet environments
- Authentic
- Observe beauty of nature
- Helps me to escape from my hectic daily life
- Allows me to discover new and interesting places
- Peaceful
- Allows me to live close to nature
- Restores my sense of harmony and balance
- Taste local food and drink

Negative and distinguishing features for Norway
- Less social

Common ground for all three countries
- Expensive
- Offers environmentally friendly offers

Lacking for all three countries
- Local cuisine

n = all respondents aware of the country in the quantitative sample
How do Norway meet generic expectations for holidays?

Norway mostly meet these expectations, except the social element.
We must address the basic expectations that Germans have when going on holiday, including basic comfort, a more social experience and more cultural content.

Areas for improvement to meet hygiene expectations

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

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

**Good food, drink and local culture**
- Talk about local food & drink traditions
- Interesting sights and local culture

Meet the expectations people have for all types of holidays
Our target group: Explorers

What they look for:
Norway’s target group is explorers. Their main motivation for travelling is to explore new territories; nature, culture, local life, food and traditions. They also want to gain new energy and to broaden their horizon.

Who are they:
They tend to have higher education, are seasoned travellers, technology savvy and travel without children.

Within this target group there are two sub segments:

Active explorers:
This group tends to favour physical active experiences in nature such as hiking, cycling, fishing etc and are. They are usually found in markets closer to Norway.

Curious explorers
This group seeks more cultural content in addition to nature experiences and favour sightseeing, roundtrips, city trips. They look to increase their cultural capital.