

Destination  
Trekantområdet



THE HEART OF JUTLAND

# How to enhance sharing of guests among cultural attractions

Destination Trekantområdet

29<sup>th</sup> September 2023



Epinion

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# The report is based on a mix of quantitative and qualitative data sources on four different markets

## Data basis of the survey

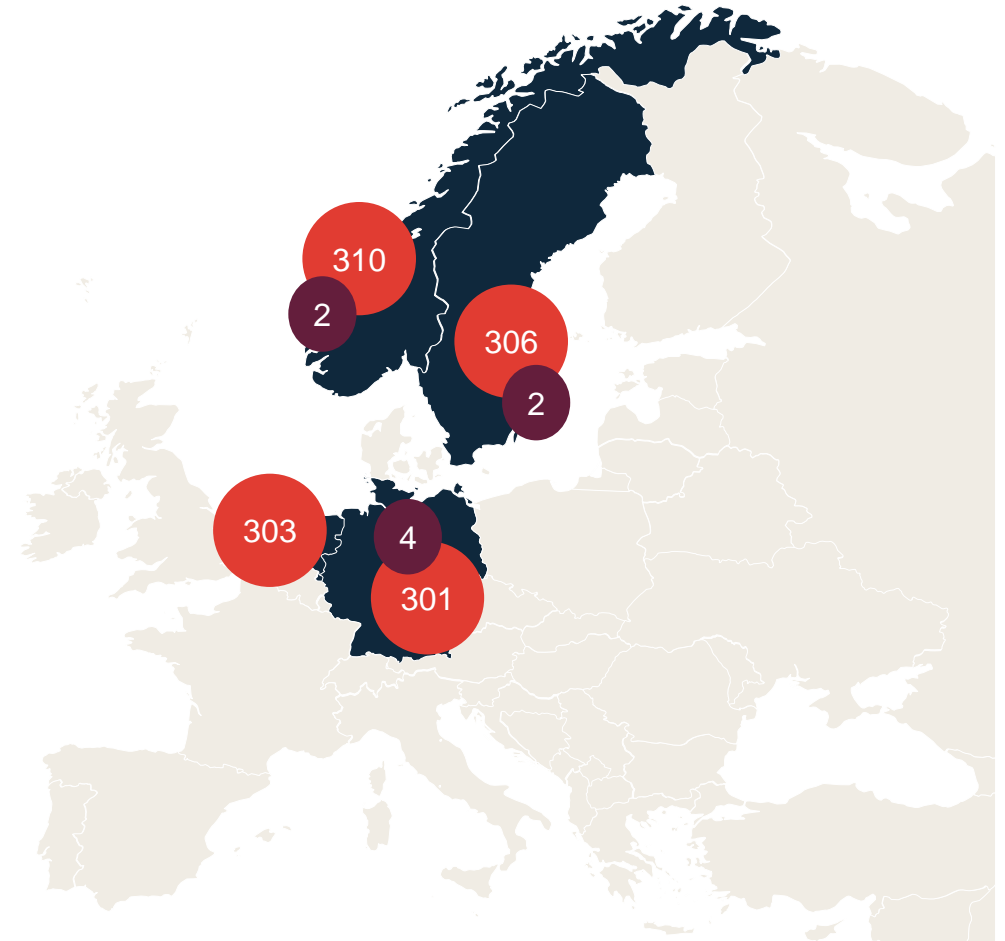
The study is based on a web-based data collection conducted by Epinion in the period 14.06 – 22.06.2023 in Southern Sweden, Southern Norway, Northern Germany and the Netherlands. The target group of the survey were people in the age of 50-70, who are likely to travel to Northern Europe by motor vehicle and without children.

A total of 1220 responses have been collected. After collection, data is cleaned, processed and subsequently weighted on the population parameters region and gender.

## Eight qualitative interviews to nuance inspiration potentials

In continuation of the quantitative study, Epinion recruited eight interviewees who represented the Destination's core target group (see next page for more details).

The eight interviewees represented Germans (four), Norwegians (two) and Swedes (two). The interviews were divided between three women and five men. The interviews had a duration of 45 minutes and was carried out either on Teams or over the phone in Danish, English or German.



# What do people like to do on their holiday?

How large is the target group? And which narratives should be communicated to appeal to them?

What do people like to do on their holiday?

# Historical and cultural experiences are important on most holidays! ... in a mix with other types of experiences

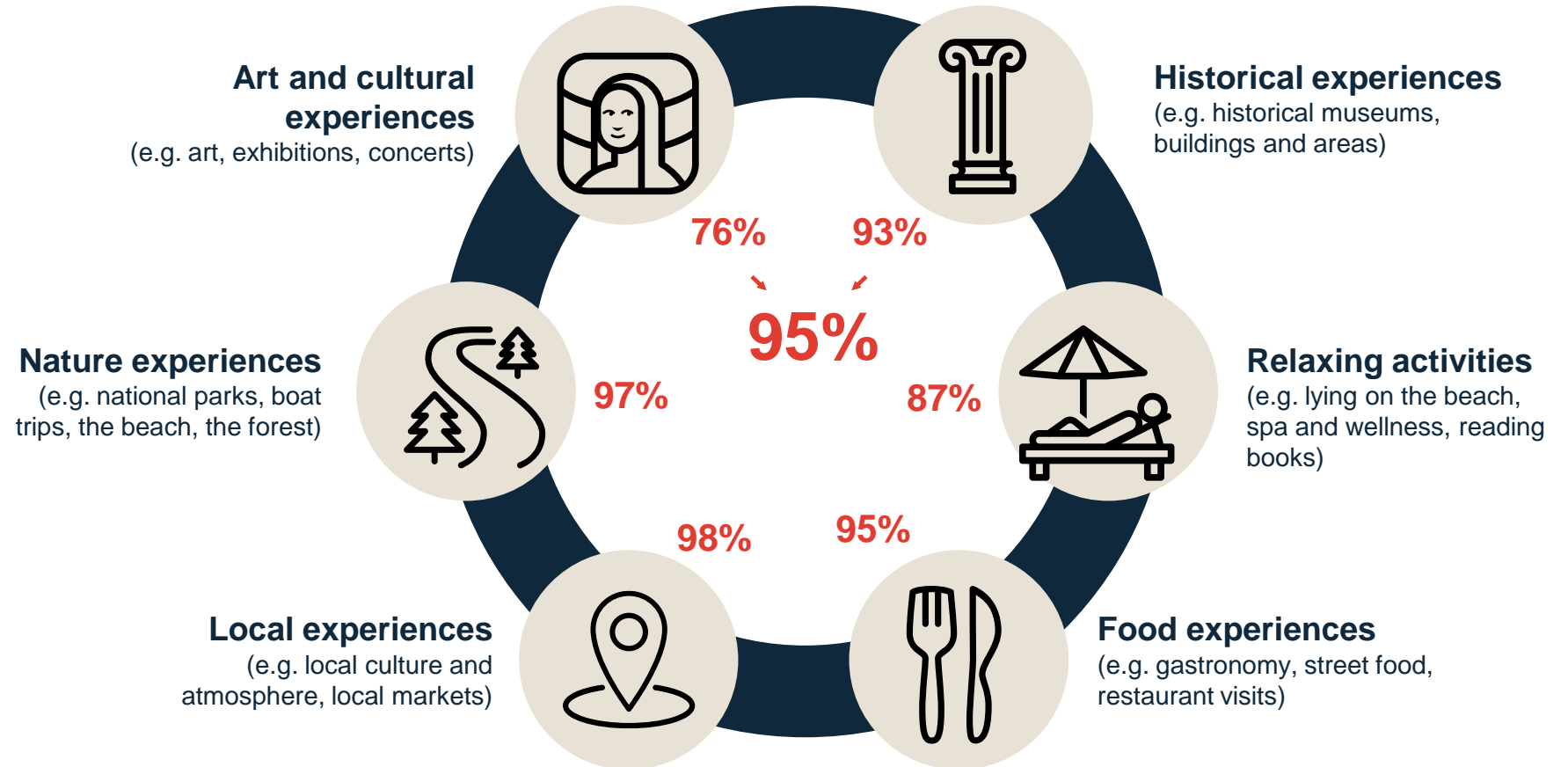
Before embarking on the development of culture-related content for a specific target group, it's advisable to gain insights into the general holiday preferences of the intended audience.

In the quantitative panel study, we initiated our analysis by examining the target group's overall activity preferences during vacations. Are they genuinely interested in cultural offerings? The data revealed a remarkable 95% of the target group indicating that cultural activities play a role in their holiday experiences. More specifically, 76% express an interest in art and cultural experiences, while 93% value historical experiences.

What's even more intriguing is that they seek these cultural encounters in conjunction with various other types of experiences. 97% seek nature experiences, 98% are keen on local experiences, and 95% on food experiences.

This implies that, during their holidays, almost everyone within the target group prefers a diverse blend of experiences. Therefore, a vacation combining history and culture with elements of nature, culinary delights, and a focus on local authenticity appears to be the ideal holiday choice for the majority.

## How much do the following types of experiences typically take up when you are on holiday?



What do people like to do on their holiday?

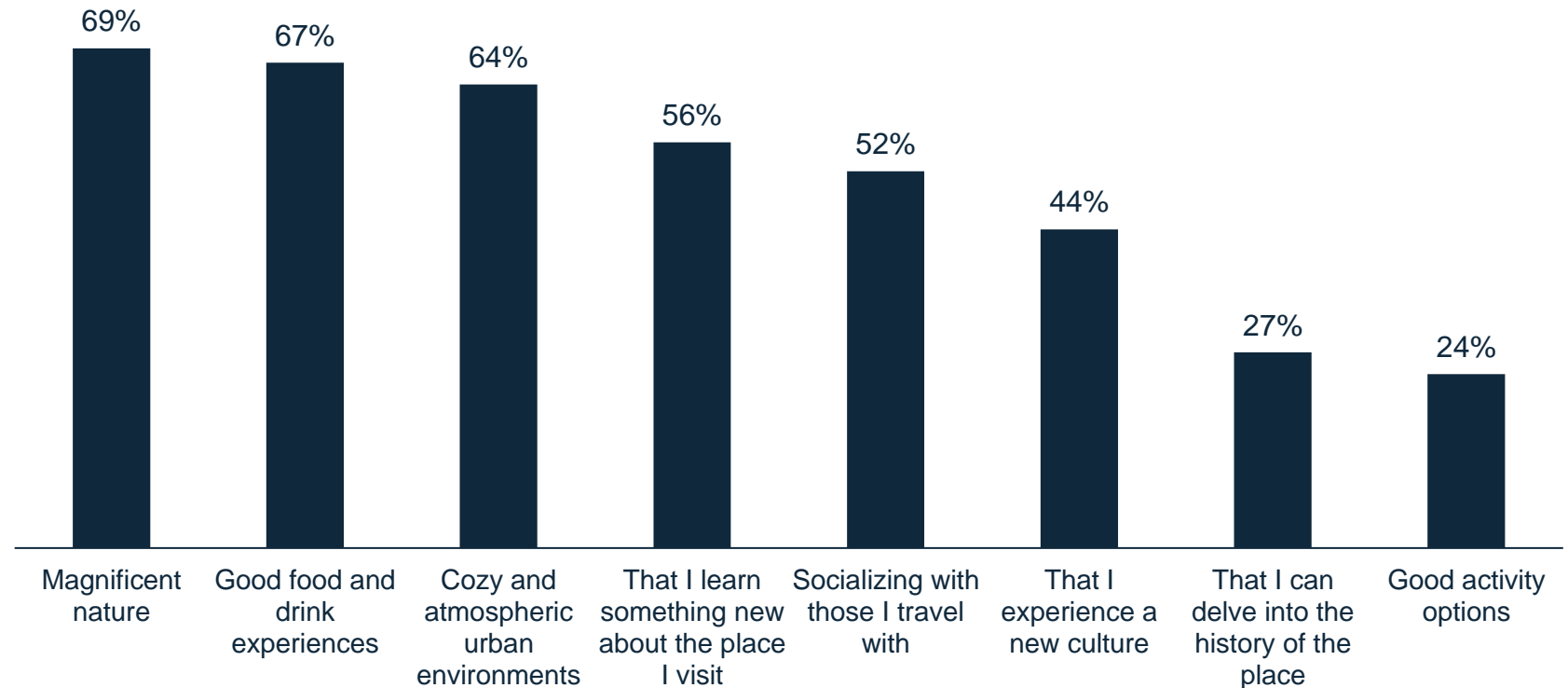
# The ultimate recipe for an unforgettable holiday: Magnificent nature, great food and cozy environments

When people seek a mix of various activities during their holidays, what are the most important ones? Or, put differently, what are the key factors in creating an unforgettable holiday experience?

It turns out that, for most individuals, the pivotal elements of a holiday are magnificent nature (elaborated on in the following pages), great food and drinks, and a cozy atmosphere. Thus, the overall scenery and atmosphere around the holiday make it special, while the specific activity options appear to be of secondary importance in the great picture.

It's also worth noting that only 27% of respondents express that delving deeply into the history of a place is essential for their holiday, even though history was deemed important by nearly everyone. This suggests that immersive historical exploration may not be everyone's preference (though still significant for 27%), with most people preferring to absorb the historical elements as a part of the overall holiday surroundings and setting.

## What helps creating the most unforgettable vacations for you?



## The guests want to experience the local with their senses



### Getting a taste of local culture

Experiencing the local is an important part of being on holiday for the eight interviewees. Exploring local life and local culture gives perspective, and all senses is activated. This is highly valued by the interviewees.

Local cuisine is particularly pointed out as in important part of exploring local culture. Exploring local produce and dishes is particularly valued, and for the interviewees a very pleasant way to get a glimpse into local life.

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*I love food, and it's important for me to try the local specialties. I research restaurants before I go, get recommendations from family, friends or while I'm on holiday. I want to try all the local specialties.*

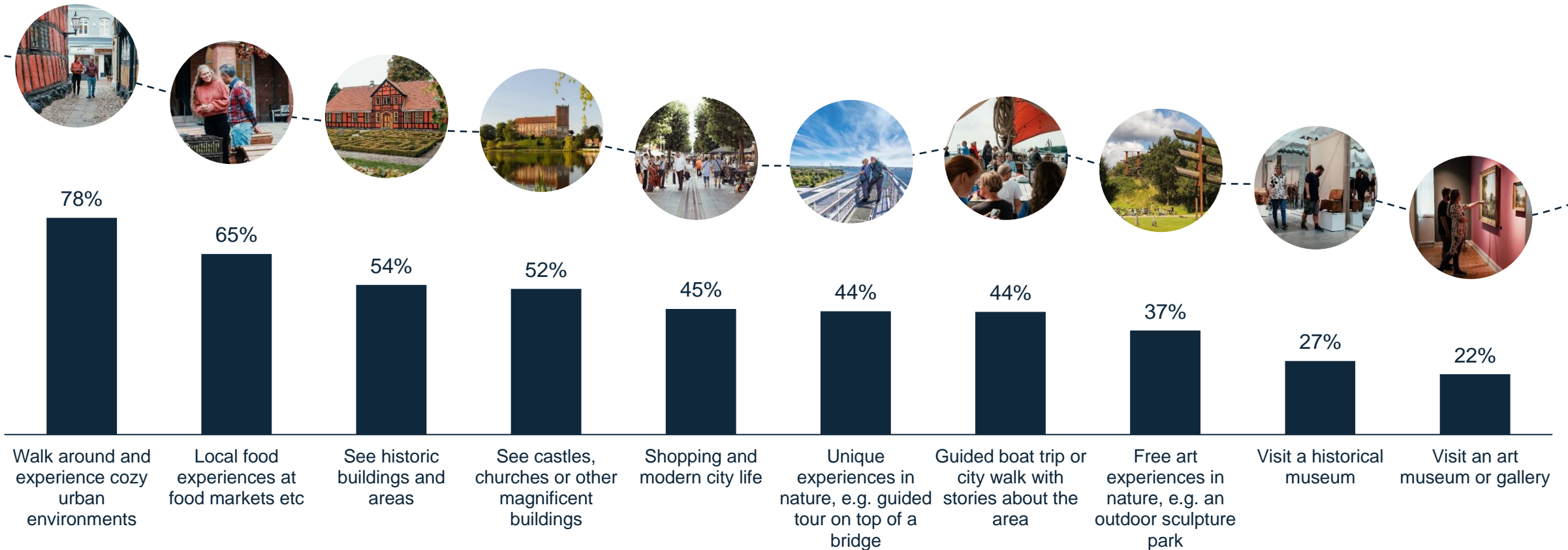
*Man, 59 years, Norway*



What do people like to do on their holiday?

# Most people prefer experiences the local history and environment through town walks, markets etc., while historical museums appeal to a smaller target group

Imagine that you are going on a three-day holiday or extended weekend in Denmark. Which of the following activities can you imagine doing during the three days? Select all the activities that you are most likely to do.





What do people like to do on their holiday?

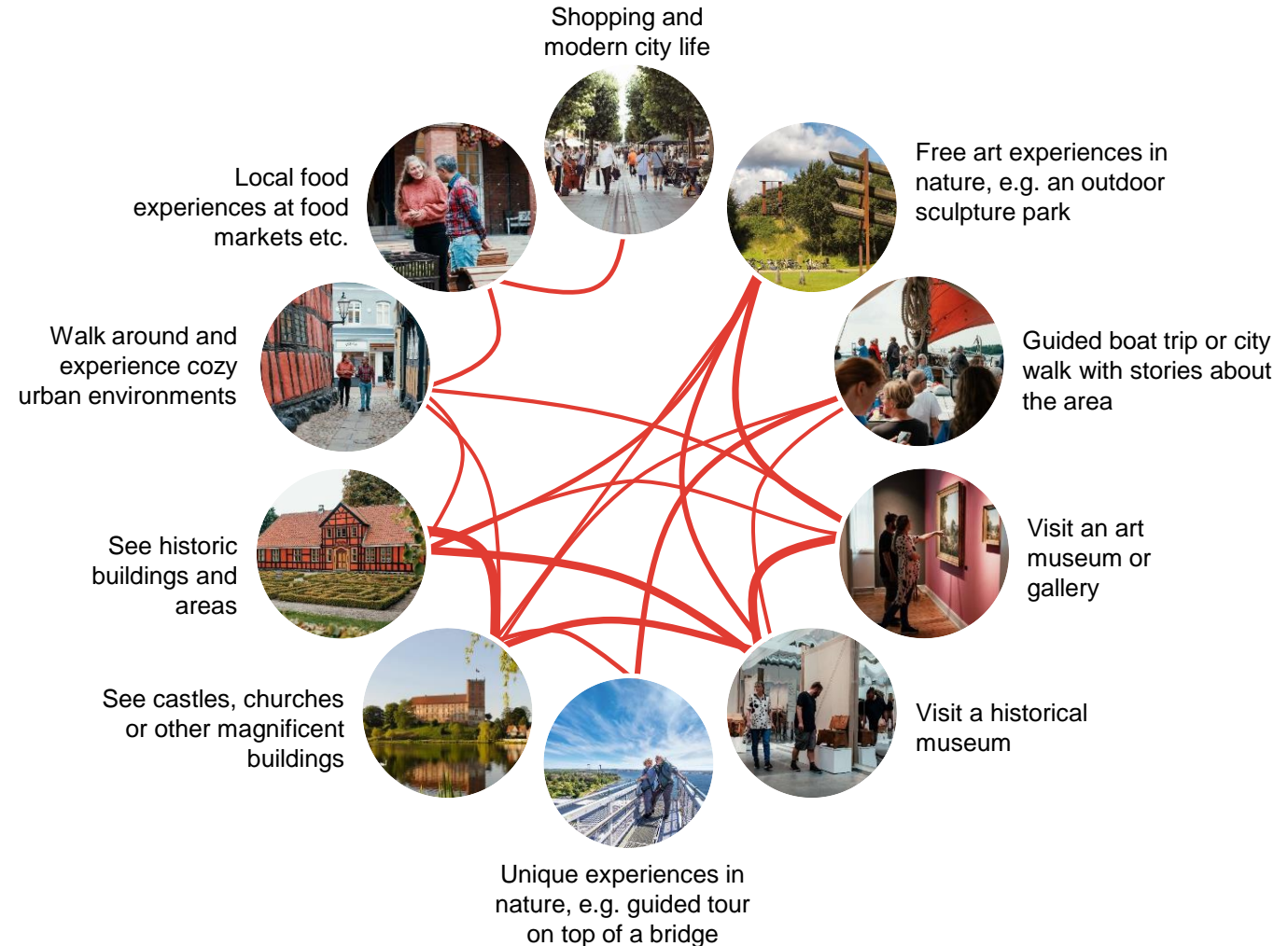
## People in the target group enjoy a mix of culture activities, encompassing both closely and more loosely related options

When examining how these activities relate to one another, it becomes apparent that individuals in the target group enjoy a diverse mix of culture-related activities. Some of these activities share commonalities in terms of form and content, while others offer distinctive experiences.

For instance, many of those who appreciate visiting castles, churches, and other grand structures also enjoy exploring historical buildings and areas, which provide a similar kind of experience. However, they also like unique experiences such as bridge walks.

In summary, this suggests that there is no need to be hesitate when it comes to combining various types of activities in your product offerings. In fact, given our understanding that people prefer blending different activities during their holidays, it's more probable that they will opt for two somewhat (or even very) different types of culture-related products as opposed to two very similar ones.

### Most significant correlations between selected holiday activities



# Planning a holiday

When and how are the holiday activities planned?

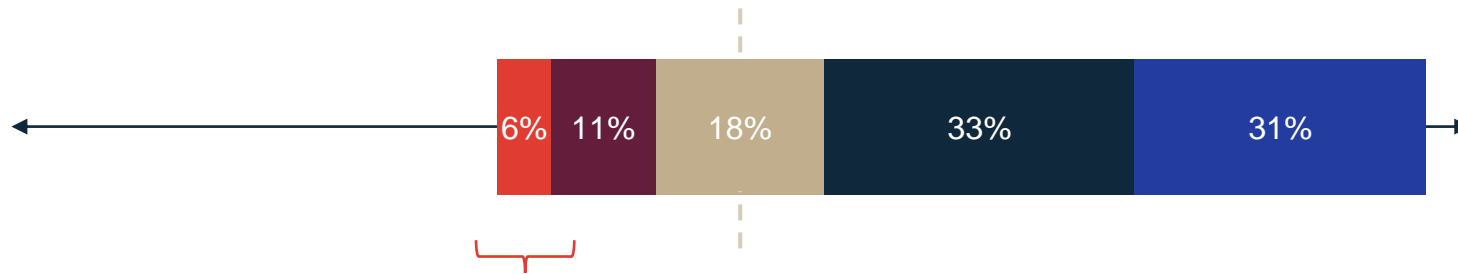
# Most individuals prefer to independently plan their holiday trips, whether it's the entire trip or the majority of it, with only a few organised elements

As we have seen, it's evident that most people favor a well-rounded mix of diverse activities for their perfect holiday. But how does one go about curating this ideal set of experiences?

One might assume that this preference would lead individuals to seek help from professionals or others in planning their holidays to ensure that all relevant activities are included. Surprisingly, the opposite holds true. The vast majority prefer to plan their holiday themselves, or at the very least, have a say in the planning process. Only a mere 6 percent lean towards having someone else fully arrange their itinerary.

## When planning a holiday, do you prefer...

... to choose package tours or guided tours where **someone has put together a good program** for me



... to **plan the entire trip on my own, and put together my own activities and experiences**

Only **6 pct.** plan all activities from home

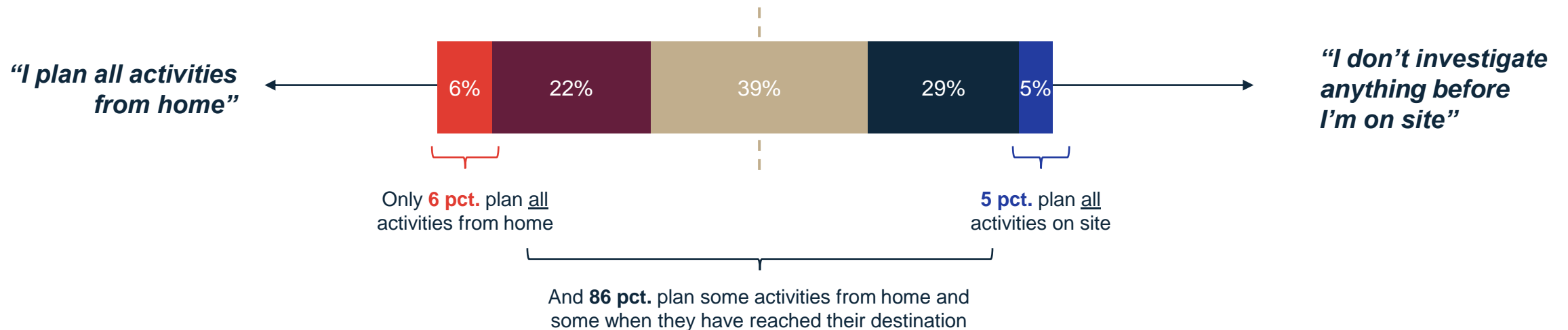
## Planning a holiday

# Almost everybody plan *some* activities from home and *some* when they are on site – meaning that information should be available both before and during the visit

The planning process begins well before departure. While only 6 percent of the target group plan all activities and design a complete itinerary from home, the vast majority of them initiate their investigations and planning for some activities before the trip, with other activities left for decision-making once they arrive at their holiday destination. Just 5 percent tend to depart without any prior planning.

This underscores the significance of engaging with visitors both before their trip through various media channels and during their stay at the location. The planning process is an ongoing journey.

Do you typically plan activities and experiences before the holiday, or do you only investigate the various options once you have arrived at the holiday destination?



# The interviewees plan for the spontaneous, so they can take a break from planning



## Being spontaneous requires research

While six out of the eight informants regards themselves as spontaneous on vacations, they do a considerable amount of research before the vacation. Research gives them an idea of must-sees, but also prepares them to go with the flow while away. The interviews show that the interviewees have a breakfast ritual of enjoying a slow morning while planning their day. In other words, research at home gives them peace of mind and they are able to make informed decisions while they are away.



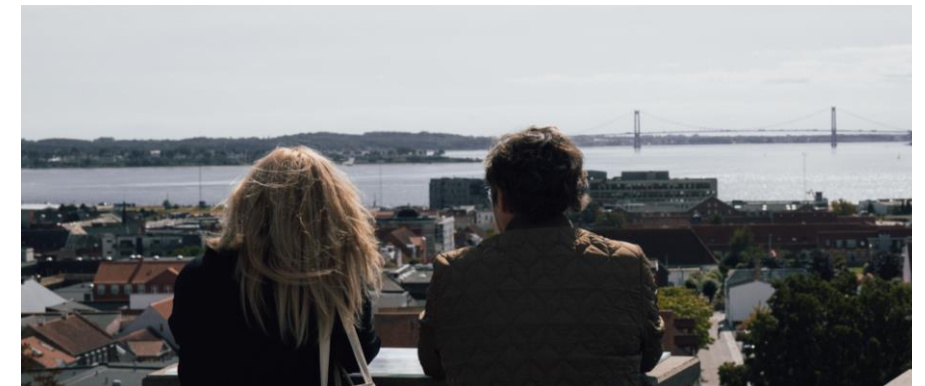
## Research eliminates 'the fear of missing out' during long weekends

Although the interviewees prefer being spontaneous, they also like to ensure that they get something out of a vacation, especially long weekend. Thus, they research to ensure that they won't miss anything that would be important to them. This is especially important to them when they go on long weekends, where they have less time to explore.

”

*Usually, we plan accommodation and 1-2 activities from home. The rest on the fly. We look for all kinds of stuff, **what's famous in the area;** museums, historical sites and attractions. Sometimes shopping and sometimes just a walk on the beach. So what's there and what we are in the mood for.*

*- Man, 62, Germany*



# The planning starts at home

Which narratives should be communicated to the target audience before they leave for the holiday?

# Attract and connect potential guests to Destination the Triangle Region with storytelling



## Storytelling inspires dreaming

Dreaming is part of planning a vacation. The informants are inspired from films, series and the internet. The interviews reveals that landscapes and nature are the primary pull factor, and then local history and culture.

Storytelling is also something that the informants are being drawn to in brochures and videos about a destination.

## *What is meant by storytelling?*

By storytelling we mean unfolding the destinations attractions, activities and surroundings in a narrative that inspires and give potential guests *lust for discovering* the destination. It can be by words or visually, but most importantly the storytelling connects potential guests to the destination prior their visit.

”

*I find inspiration for visiting new places in films, tv-series, art or books. I dream about visiting the places, for instance I saw this show about Scotland, and not I have to go explore for myself because I can't stop dreaming about it.*

Woman, 52 years, Sweden

## Shorter vacations are planned, but the impression of autonomy is important



### Travel concepts inspire but should leave an impression of autonomy

Concept travels or packages are interesting for the interviewees, but they also like to remain autonomous to a certain level. Otherwise, the concepts would crack their self-image (being spontaneous explorers) too much.

It's too important for the interview persons to be able to continue dreaming, and not feeling trapped by following a group travel.



”

*If there is too much selling, I don't like it. I like to read stories and get taken into the culture. I don't like if they sell too much to me. It shouldn't look too professional or too much selling I like that. If it's too retouched, then I don't like it.*

Man, 69 years, Germany



## The planning starts at home

# Traditional platforms such as websites and printed material remain important in this audience

When members of the target group embark on their holiday planning from home, they draw inspiration from various sources.

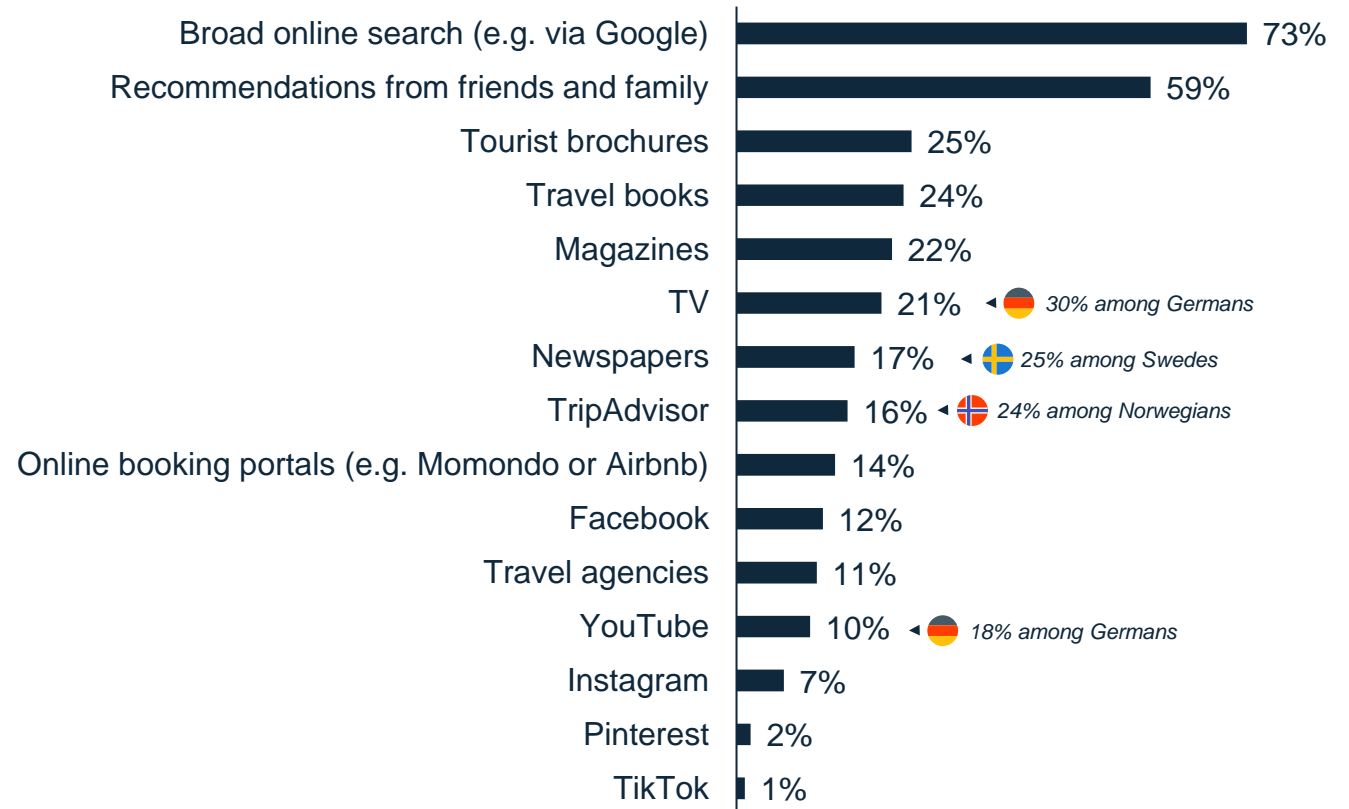
The most widely used media channel is a broad online search, via Google or similar search engines. This study does not provide detailed information about the specific locations and methods of these searches (which would require a more focused analysis of information search behavior), but the high ranking underscores the importance of targeted SEO efforts and content creation for various websites.

Secondly, recommendations from friends and family play a vital role in inspiring travel plans. These personal connections consistently serve as significant sources of inspiration, whether the topic is travel, experiences, consumer products, or any other purchases.

Further down the list, we encounter more traditional written media sources, including tourist brochures, travel books, and newspapers. The fact that these media sources rank relatively high on the list is associated with the fact that the target group comprises an older demographic. If it had included a younger audience, the picture would likely have been different.

At the bottom of the list, we find social media. Despite many within the target group being active on platforms like Facebook, their use for travel inspiration remains limited for now.

## Where do you typically get inspiration for holiday activities and experiences before you go on holiday?



Inspiration for unplanned  
activities during the  
holiday

## Eye-catching information and inspiration on the go is attractive



### Always on the lookout for inspiration

All of the interviewees are inspired by information on the go. The interviewees read local newspapers, brochures and ask around for recommendations. Internet research is also used, but the interviewees point out that it is primarily visual inspiration that catches the eye, they are interested in.



### Looking for the hidden gems

The interviewees also stress that they prefer a wider range of activities while on vacation, and thus visual inspiration is usually different kind of activities than they have already planned.

”

*I use my eyes, I can look in the local paper – what's going on here, I look at posters in the area and get ideas of what to do.*

Woman, 62 years, Sweden

*I look at brochures and bring them with me. I always come home with a lot of brochures when I get back home.*

Woman, 59 years, Sweden

What do people like to do on their holiday?

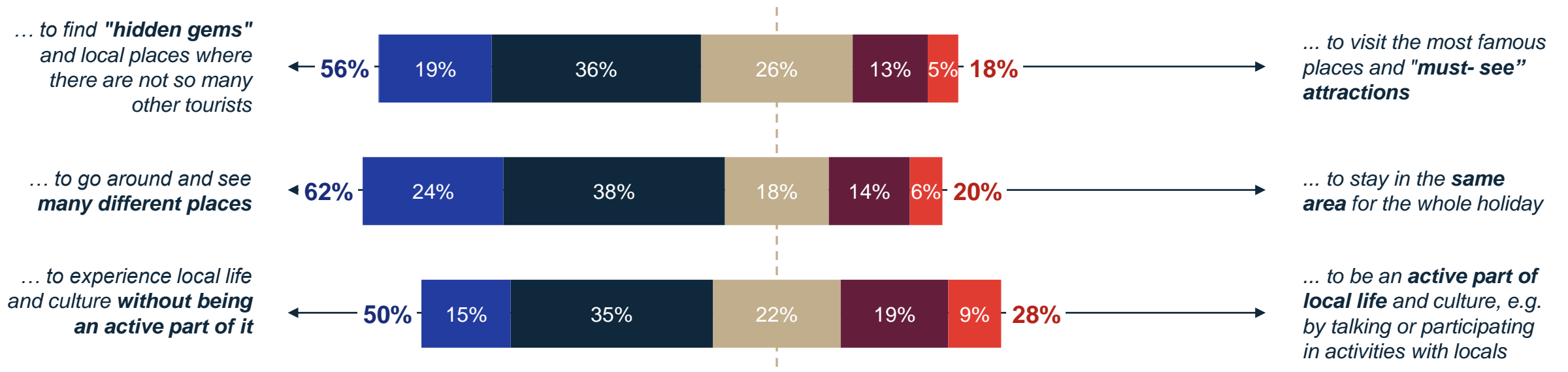
# Everybody wants to find those hidden gems!

While tourists may want to explore and make the most of their stay, it doesn't mean they're inclined to visit only the must-see attractions and crowded tourist hotspots. Most of them would much rather travel around and discover those hidden gems that offer something truly unique. This aligns with their preference for crafting their own travel experiences, avoiding the feeling of merely following the well-trodden paths of other tourists.

Furthermore, they prefer to hop around and explore different places rather than staying in one location for the entire vacation. This approach enhances their chances of creating a one-of-a-kind itinerary.

However, it's worth noting that while they may seek out hidden gems and explore communities, they tend to maintain a certain distance from the local population. Most do not feel the need to deeply engage with the local community, while they're on a holiday.

## When I'm on holiday, I prefer...



## Quality is measured by *the local feel* and not by price



### Quality experiences, but not pricy experiences

If travels don't leave an impression of quality; quality food, quality activities and so on, they are discarded quickly by the interviewees. On the same time, six out of the eight interviewees point out that they are not interested in pricy activities.



”

*I often get the impression from travel guides that content and recommendations are paid for. I really don't like that. I want quality experiences, proper quality recommended by locals who have enjoyed the experiences themselves.*

Man, 59 years, Norway

# There's a great potential in engaging front personnel at hotels, museums etc.

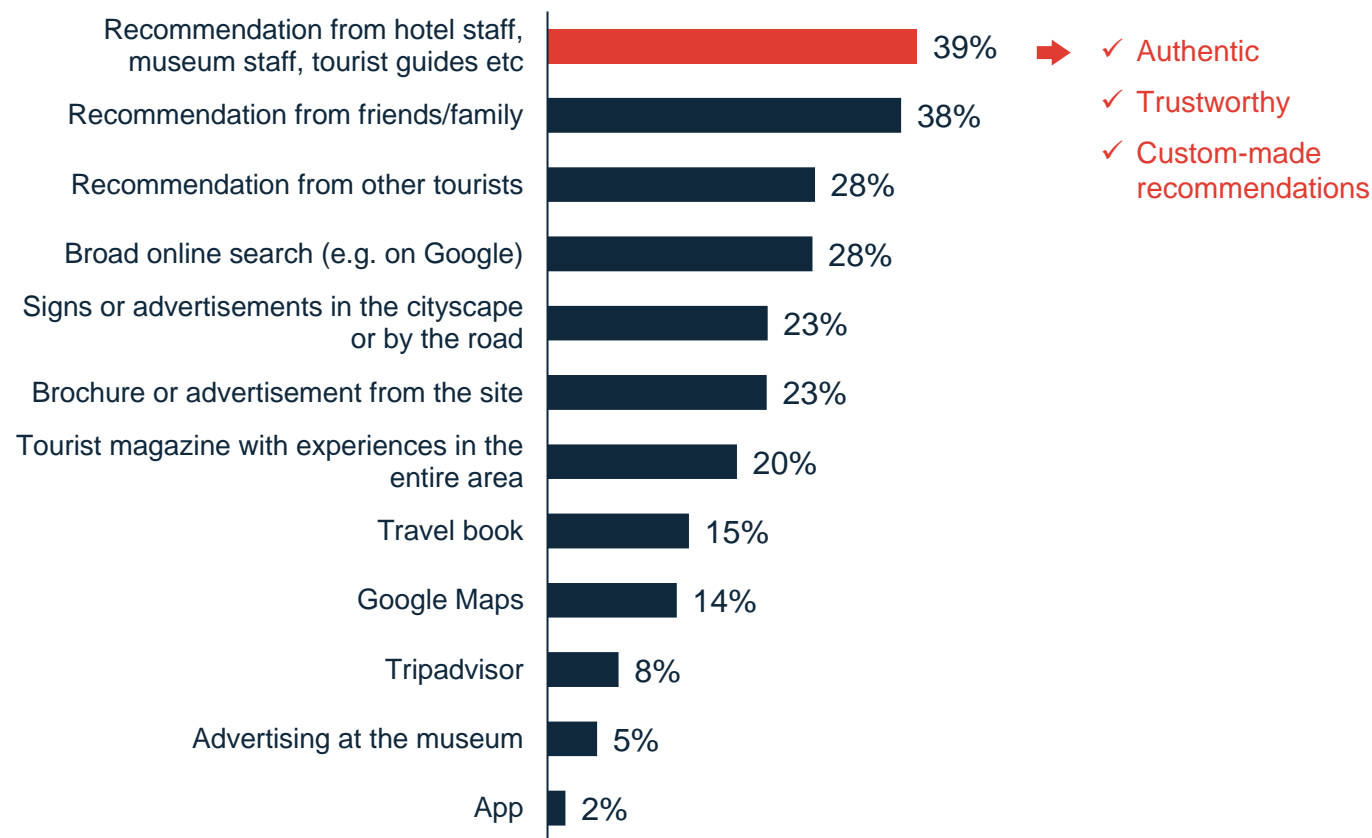
We already know that tourists seek inspiration and make some plans in advance, but they are also open to discovering new experiences once they have arrived at their destination.

Interestingly, it's not online searches that provide this new inspiration. Instead, recommendations from various live individuals have the most significant impact when it comes to inspiring visits to new places that weren't initially planned.

It's worth noting that friends and family, while ranking closely behind, aren't at the top. Surprisingly, it's the front-line personnel, such as hotel employees, museum staff, and tourist information professionals, whose recommendations hold the greatest sway in motivating guests to engage in activities they hadn't previously planned.

If there's one area to focus on to encourage guests to explore more cultural experiences during their stay, a targeted effort toward front-line staff appears to be an excellent starting point.

## Try to think back to a holiday where you did an activity or visited a place that you hadn't planned from home. How were you inspired to do that activity/visit that place?



## A target group that has had some unpleasant tourist trap experiences



### Reliable recommendations are experiences that are curated by trustworthy locals

During the research and while on vacation, the interviewees are on the lookout for tourist traps. Concepts that are curated and maybe presented by a trustworthy, local person is highly valued. If the recommendations does not have this kind of reliability, then the interviewees flee from the proposition as they have all had very bad tourist trap experiences.

”

*Concept travels are absolutely interesting, if the activities are carefully curated. For instance, it could be a recognized individual who made the recommendations. That's **trustworthy** for me.*

Man, 59 years, Germany



Concept evaluation:  
How does the target audience  
like the concept?



## The respondents were presented with the following concept description:

In a holiday area in Denmark, various actors are currently working together to develop some new experience concepts for tourists who come to the area. Among other things, "guides" with suggestions for various excursion destinations in the area within various themes. For example:

- **3000 years of history in 3 days:** Visit historic natural areas, castles and museums in the area, which give an insight into the area's history over the past 3000 years.
- **In the footsteps of the kings:** Discover how the Danish kings have influenced the area over time when you visit old royal castles, market towns and museums.
- **Taste the history:** Get an insight into the local food and drink through time with visits to agricultural museums, farm shops or local breweries

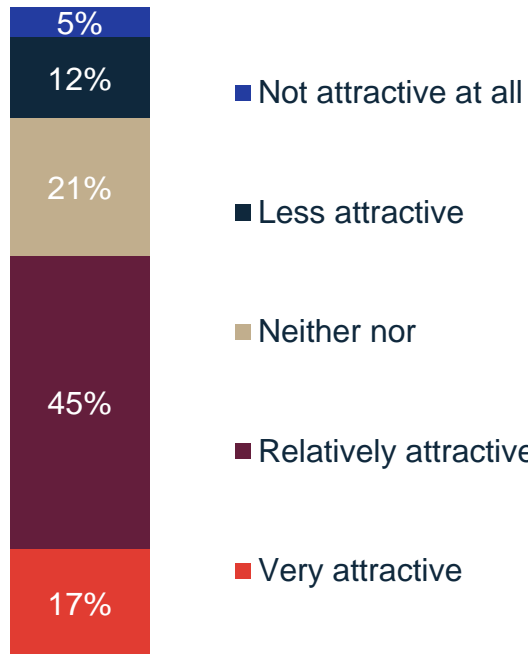
## Concept evaluation

# The majority of individuals find the concept attractive. Those who don't are often concerned about feeling constrained by a fixed itinerary

When presented with the concept (as shown on the previous page), the majority of the target audience initially react positively. 62% find it either highly or reasonably attractive, while only 17% find it less appealing.

Among those who find it less attractive, the primary reasons are a perception that the program seems too rigid and a preference for crafting their own itinerary.

## How attractive would it be for you to follow such an "experience package" that guides you around to various excursion destinations within a certain theme?



”

*I am not interested and would rather decide for myself.*

*Likes to take things on the spur of the moment*

*I would rather see a little of a lot than immerse myself in one subject for 3 days*

*Package of food from the local think 10 times more important.*

”

*Because you experience history intensively, through taste and experience.*

*You get more information or things to do than if you had to discover everything yourself.*

*Never been to Denmark before, so this is very handy*

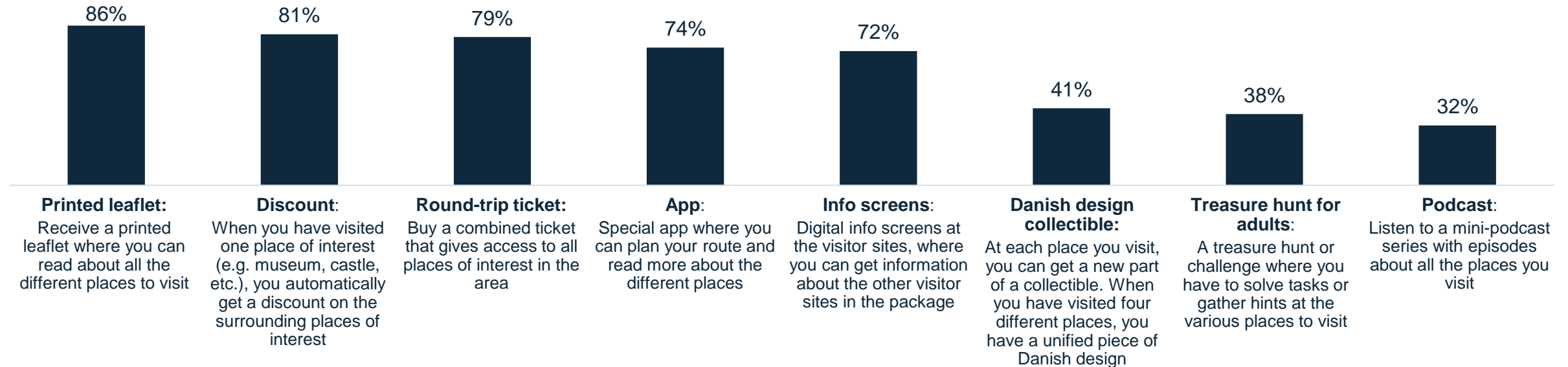
*Presumably it has been carefully selected for the best possible experience*

# There are several approaches to presenting the concept that resonate with the audience. From ordinary printed materials to apps and design collectibles

Not surprisingly, the most popular methods of sharing the concept involve various forms of discounts (keep in mind that we're dealing with a price-conscious audience) and familiar media channels, such as printed leaflets.

However, they are also open to new ideas. In fact, 41% of the target group is in favor of the concept of creating a Danish design collectible where you collect different pieces of the collectible every time you visit a new place. Keep in mind that this audience prefers not to have their travel itinerary created for them, so it might be a good idea to offer different routes or pickup locations.

**In connection with the concept development, several different ideas have come up on how to motivate the tourists to visit several different places within the same "experience package". How attractive would the following ideas be to you?**



# Additional considerations for new product development

## Sustainability gives *that* extra to a destination but it's not a pull factor



### **Sustainability isn't a pull factor, but it leaves a great impression of the destination**

For half of the interviewee's sustainability is an important part of their life, but it's not a factor that they choose vacations with.

Instead, a sustainable destination leaves a great impression, and it is something they would mention if recommending the place to others. Especially if noticeable preventions of nature, trash handling and general waste management is noticeable.

”

*It's not something that draws me to a place, but I appreciate if a destination is sustainable. I'm aware of it, but it doesn't pull me to a place.*

Woman, 52 years, Norway

*For me it's disturbing if I can't trash sort things and if I can't have a green/sustainable behaviour. It disturbs me, so I like when destinations helps me being green.*

Woman, 62 years, Sweden

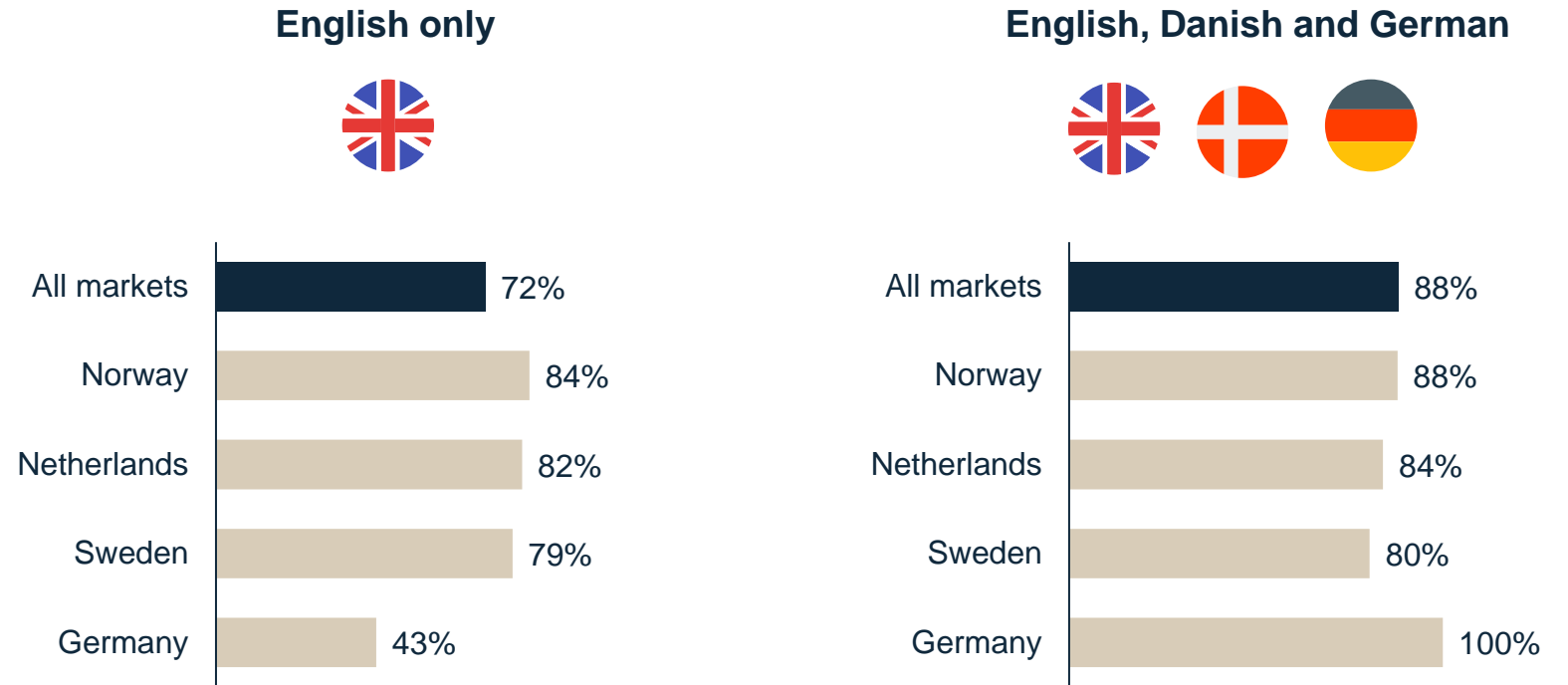
# The choice of language remains important: Less than half of the Germans will be able to understand written material in English

"As a final consideration, it's essential to determine how many languages and which specific languages new written content should be translated into.

While one might assume that most tourists these days can understand English, the reality is that only 72% of the target group are comfortable with the prospect of understanding information written in English. Within the German sub-target group, this percentage drops to just 43%.

By adding Danish and German as language options, you can cover 88% of the target group. However, it's important to note that there is still a segment of 20% of Swedes who do not understand Danish, English, or German.

## Share of the tourists who will understand written material, if it is available in...



# Summary and take aways

# The target groups main characteristics summarized

- 1. Mixing culture, history and nature is the preferred type of vacation**  
The target group prefers a mix of activities and sights when exploring a new destination, rather than exploring only historical sights.
- 2. Research and information seeking is primarily online**  
The target group are present on a wide range of websites and platforms when they look for information about a new destination. They also find inspiration in TV programmes, television and other visual formats.
- 3. Autonomy and being impulsive requires planning at home**  
The target group wants to feel free while they are on vacation, so they plan and research online from home, so they can be impulsive on the go. The research at home is also an act of escapism of everyday life, and the research sparks dreaming of joy of going on vacation.
- 4. Language barriers are a challenge**  
Communication in only Danish and English is especially challenging for the Germans.





## Three key take aways from the report:

**1. Before the holiday: Focus on story telling**

Provide inspiration and the opportunity to create dreams. Don't make too specific recommendations and itineraries – the feel of a package tour scares away most people.

**2. During the holiday: Have trustworthy persons share authentic recommendations**

These may be way more specific – but it should still feel like you can freely choose from a pallet of good experiences. Ideally, the recommendations are custom-made for each individual and shared by a trustworthy person, e.g. hotel staff

**3. Present a mix of experiences**

Build narratives that include "building blocks" of different kinds (nature, history, food etc.). When making recommendations on site, share experiences that are slightly different from the ones the visitor has already had.

