

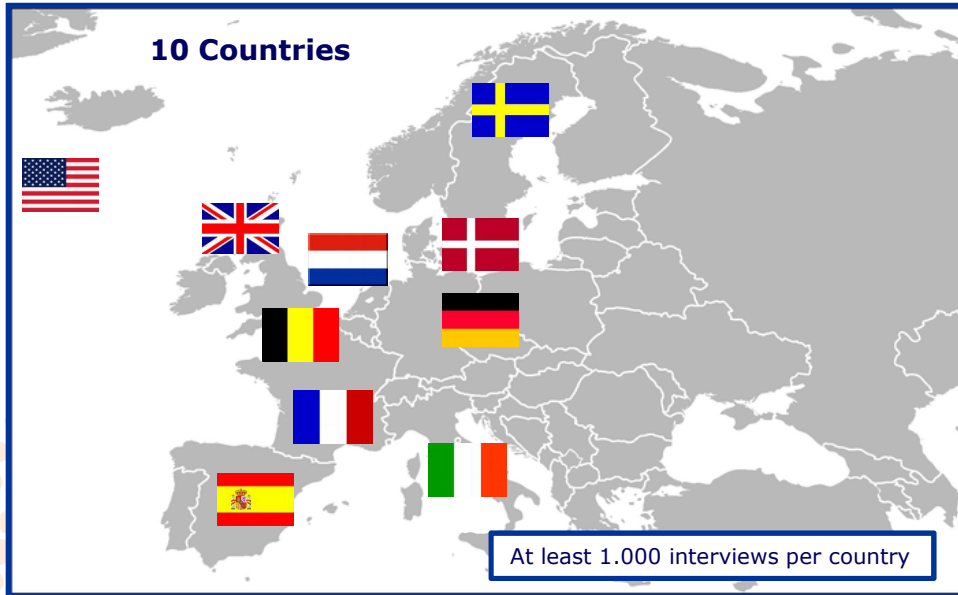


NEDERLANDS BUREAU  
VOOR TOERISME & CONGRESSEN

# Travel & Life Style segmentation

Research department  
September 2008

# International Travel and life style segmentation

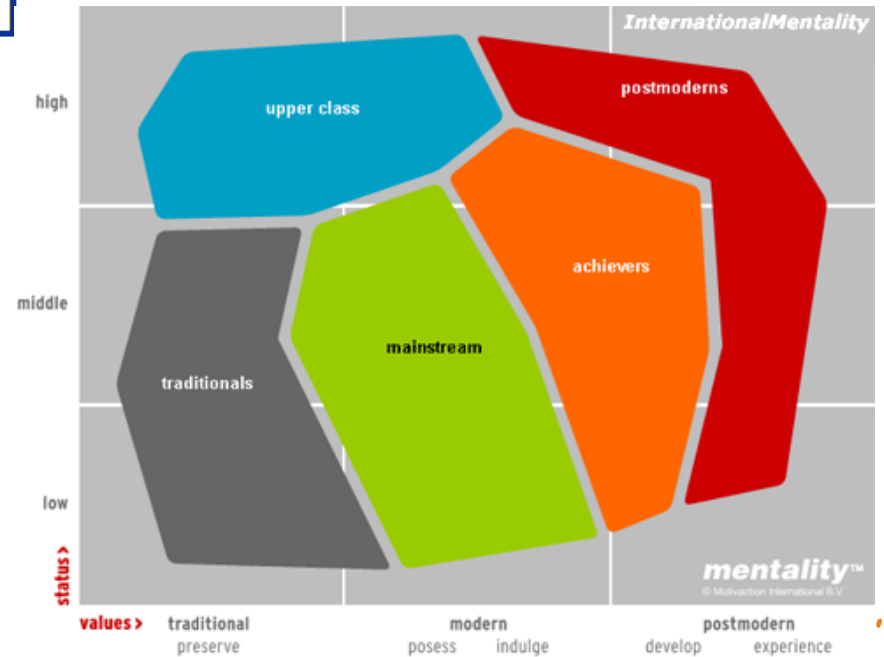


- 6 lifestyle dimensions**
- Cultural openness
  - Material status
  - Family & tradition
  - Norms & authority
  - Excitement & adventure
  - High culture

- 5 travel dimensions**
- Security
  - Challenge
  - Togetherness/family
  - Enjoyment
  - Exploration

- Travel behaviour**
- Travel frequency
  - Business vs leisure travel
  - Visited countries
  - Used accommodations
  - Kind of holiday undertaken
  - Interest in pmpc's Holland

- Media behaviour**
- General use of internet, newspapers, magazines
  - Sources used for preparation trip

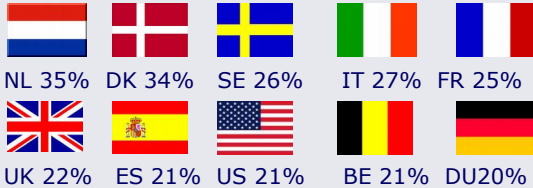


# Traditionals

*'Having a good time, when we've deserved it'*

## Size & Countries

Overall: 22% of the population



## Socio demographic

- Over representation 50 years and older
- Mostly couples with older kids or empty nesters
- Below average education
- Low-medium income, but higher disposable income since the standing charges are lower.

Ability: more time, average money



## Media behavior

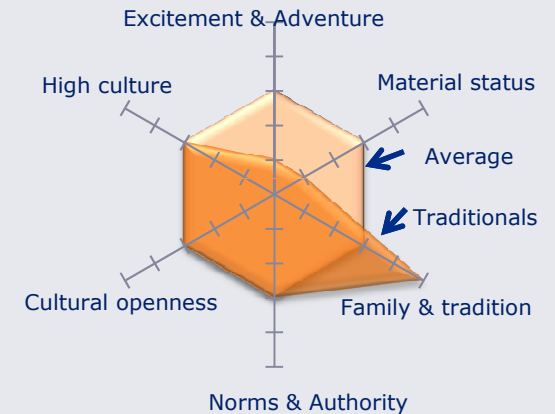
- Low on media use: read newspapers and magazines less than average
- Average use of internet in general, low use of internet for booking a trip
- Often use one main source of information before booking a trip, mostly information from family or friends.

## Life Style

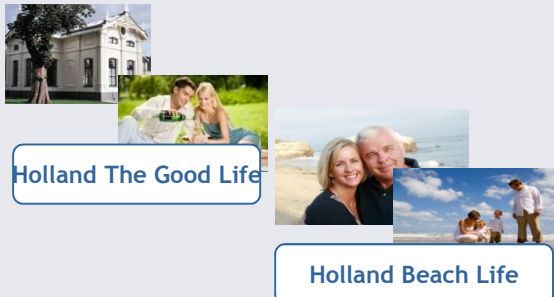
- Attached to tradition
- Calm & harmonious life
- Family life is important
- Family is more important than career
- Traditional division of roles in family
- Acceptance of rules and regulations
- Risk averse: regular, orderly and discipline
- Locally oriented
- Oriented on liked-minded people
- Focus on passive entertainment



## Life Style & values



## Mainly interested in.. (for travellers from Holland and neighbouring countries)



## Travel motivation

- Security and safety are important
- Mostly more focus on the travel company (family and friends) than on the destination
- During holidays like to be surrounded by liked-minded people
- In general locally oriented
- Adverse to challenges
- Nostalgia

## Travel behavior

Average travel intensity:

- 0-1 long trip per year
- 1-2 short trips per year
- prefer midrange hotels and for holidays in Holland also holiday houses
- don't travel much for business
- Competition Holland: mostly neighboring countries Belgium and Germany

# Mainstream

## 'Having fun with the family'

### Size & Countries

Overall: 17% of the population



NL 24% DK 19% SE 27% IT 13% FR 14%



UK 20% ES 17% US 29% BE 19% DU 16%

### Socio demographic

- Over representation 35-45 years
- Mostly couples with children
- (Below) average education
- Low-medium income

Ability: less time, average money



### Media behavior

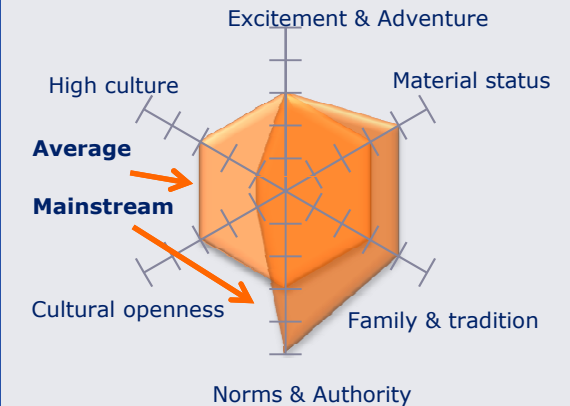
- Low on media use: read newspapers and magazines less than average. Due to the lack of time
- Average use of internet in general
- Often use two main source of information before booking a trip, mostly information from friends and the internet.

### Life Style

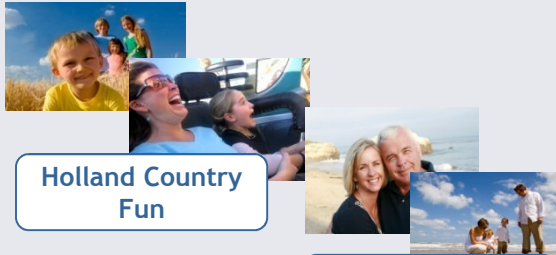
- Balancing between traditional norms and values and change
- Family oriented
- Traditional division of roles in family
- Work for security and challenge
- Want status and respect
- Materialist orientation
- Feel let down by society
- Law and order
- Longing for authority, leadership and rules
- Locally oriented



### Life Style & Values



### Mainly interested in.. (for travelers from Holland and neighboring countries)



Holland Country Fun

Holland Beach Life

### Travel motivation

- Security and safety are important
- Mostly more focus on the travel company (family) than on the destination
- Mostly only take holidays with family
- During holidays like to be surrounded by liked-minded people
- In general locally oriented
- Like to consume and be amused: focus on passive entertainment

### Travel behavior

- Low travel intensity:
- 1 long trip per year
  - 0-1 short trips per year
- long lead time for holidays: book 3-6 months ahead
  - prefer midrange hotels and for holidays in Holland also holiday houses or mobile home
  - don't travel much for business
  - competition Holland: mostly neighboring countries of the origin destination

# Upper Class quality seekers

*'Spending quality time together'*

## Size & Countries

Overall: 17% of the population



NL 12% DK 12% SE 9% IT 13% FR 26%



UK 13% ES 9% US 12% BE 23% DE 22%

## Socio demographic

- Over representation of 35 to 45 years
- Mostly couples with kids or empty nesters
- Higher educational level
- Higher income

Ability: less time, more money



## Media behavior

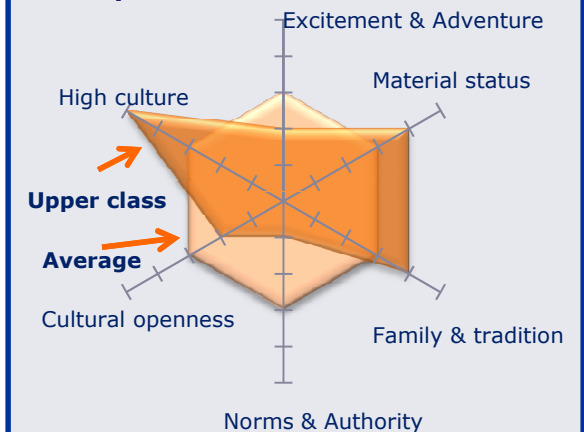
- High on media use: read newspapers and magazines more than average
- Highest use of internet in general and in information process for holidays.
- Highest use user generates sites and information from family and friends as main sources for holidays.

## Life Style

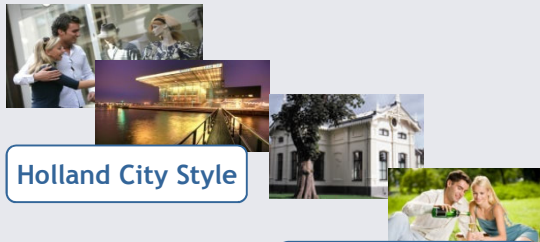
- Attached to traditional norms & values, protection of social status
- Family life is important
- Work provide status and identity
- Traditional division of roles in family
- Take note of etiquette
- Acceptance of rules and regulations
- Risk averse: regular, orderly and discipline
- Interested in politics and history
- Internationally oriented



## Life Style & Values



## Mainly interested in..



Holland City Style

Holland The Good Life

## Travel motivation

- Take different kind of holidays with different travel motivations: with the family, only with partner or group of friends.
- On holidays with family: more focus on the travel company then on the destination: spending quality time together.
- Comfort and luxury are more important: more high end hotels and restaurants and use of relax facilities
- More than average interest in high culture
- In general international oriented

## Travel behavior

- High travel intensity: 2 long trip per year, 3 or more short trips per year
- Medium lead time: book 1 to 3 months ahead
- Prefer midrange or more high end hotels. For Holland also more luxurious holiday houses
- Travel for business: mainly individual business trips and international meetings.
- Competition Holland: wide variety of countries, mainly surrounding and Mediterranean countries

# Postmoderns

*'Travelling is an experience'*

## Size & Countries

Overall: 22% of the population



NL 21% DK 23% SE 22% IT 24% FR 21%



UK 22% ES 25% US 15% BE 18% DU 21%

## Socio demographic

- Slight over representation 35-45 years (high diversity in ages between countries ) a lot per country)
  - Mostly couples and families
  - Higher educational level
  - Medium-high income
- Ability: more time and more money



## Media behavior

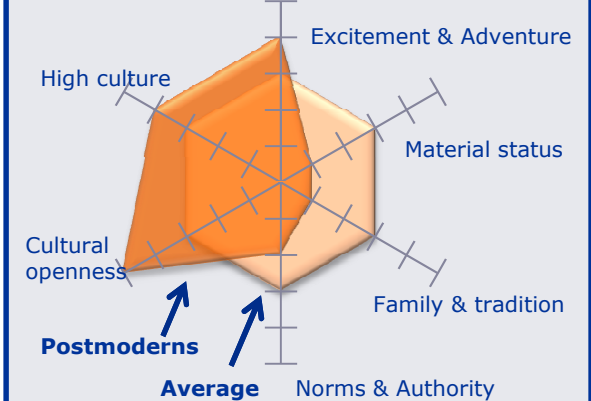
- High media use: read newspapers and magazines more than average (take the time to read)
- High use of internet in general and in looking and booking for holidays
- Internet, family and friends and user generated sites are the main sources of information.

## Life Style

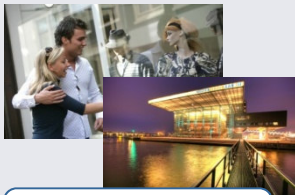
- Individualists
- Immaterial values are important
- Open minded & tolerant
- Freedom and independence are important
- Break moral boundaries
- Self actualisation
- Seeking for experiences
- Mix high and low brow culture
- Hedonism
- Internationally oriented



## Life Style & Values



## Mainly interested in..



Holland City Style

## Travel motivation

- Travel a lot and different kind of holidays
- Often more focus on the destination than on the travel party
- Like meeting people from other countries and cultures
- The cultural experience of a destination is important: cultural sights and museum, but also meeting locals, going to festivals/events, etc.

## Travel behavior

High travel intensity:

- 2 or more long trip per year
- 3 or more short trips per year

- Short lead time: book 2 months or less ahead
- prefer midrange hotels , also for trips to Holland
- travel for business, but less than upper class

-Competition Holland: wide variety of countries, competition depending on type of holiday.

# Achievers

## 'Getting everything out of life'

### Size & Countries

Overall: 22% of the population



NL 9% DK 12% SE 17% IT 23% FR 25%



UK 23% ES 28% US 23% BE 21% DU 20%

### Socio demographic

- Over representation 35 years and younger
- Mostly couples or singles
- High educational level
- Medium-high income

Ability: less time – more money



### Media behavior

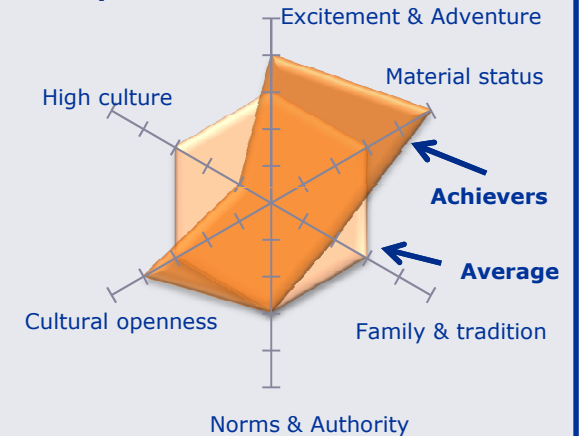
- High media use: read a lot of newspapers and magazines.
- High use of internet in general and in looking and booking for holidays
- Use a lot of different sources of information, but focus on internet an user generated content

### Life Style

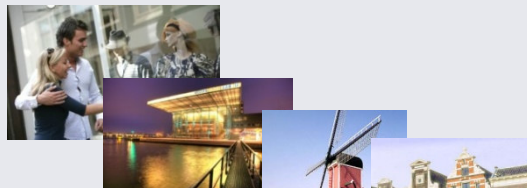
- Individualists
- Materialists
- Status oriented
- Career oriented: career is more important then family
- Thrill seeking
- Hedonism
- Want to get every thing out of life
- Internationally oriented



### Life Style & Values



### Mainly interested in..



Holland City Style

Holland Classics

← Only Asia

### Travel motivation

- Mostly more focus on the destination then on the travel company
- Travel in differ t travel groups, mostly with partner or friends
- Want to get everything out of a holiday: pressure to perform and having fun.
- Good quality accommodation and restaurants are important
- Are looking for active entertainment like trendy bars clubs and events. But also like shopping.

### Travel behavior

- Average travel intensity: < 1 long trip per year, 1-2 short trips per year
- Short lead time: mainly book less then 2 months ahead
- prefer midrange and high end hotels
- travel for business , but less then upper class
- Competition Holland: mostly other cities in Europe