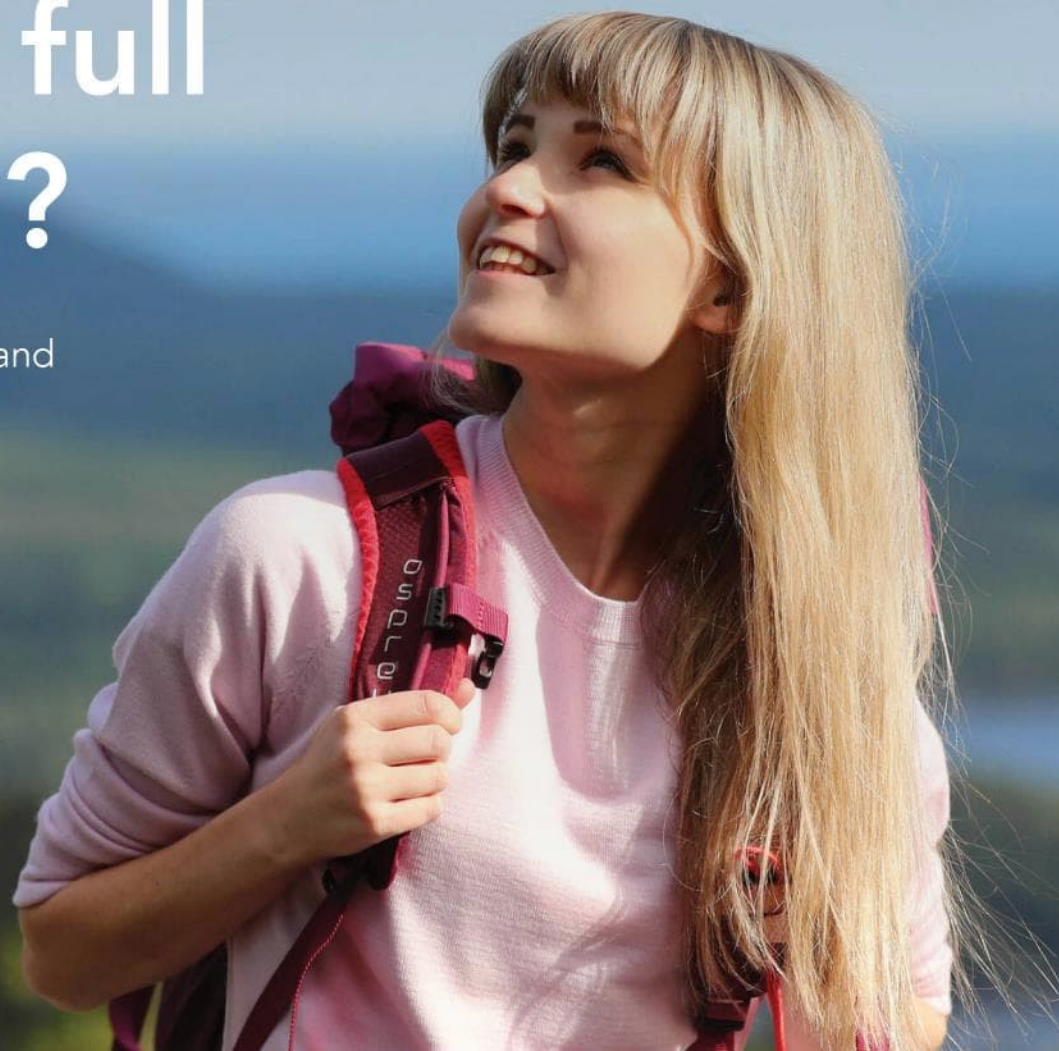


RESEARCH REPORT

How to reach Finland's full potential?

Visit Finland, potential, position and
segmentation study for Finland



Visit Finland

CONTENT

1. What are the key learnings?

Executive summary & key conclusions

2. What is the market like?

Competitive landscape & Finland's position

3. What is interesting?

Interest area classification

4. Where is Finland's potential?

Segmentation and core target groups

5. What to do in practise?

Recommendations and approaches for segment utilisation

6. What profiles different target markets?

Country level results

Over 16.000 respondents from 8 countries

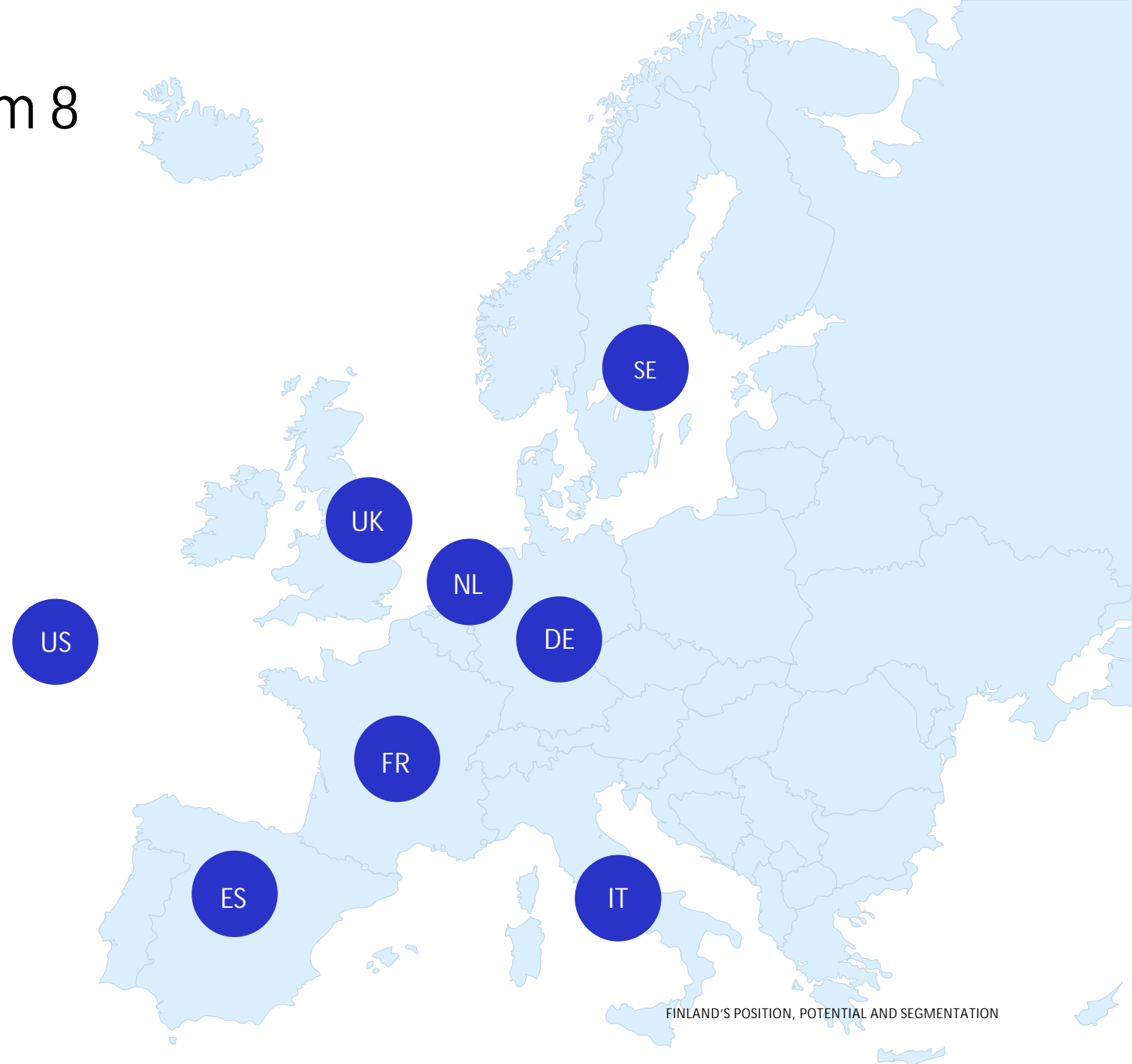
Project was done by research agency Red Note and the data was collected in Dynata online consumer panel in February 2023.

Target group was defined as consumers planning a leisure vacation trip during the next 3 years, Those interested only in sun and beach holidays were excluded.

Nationally representative starting samples. Germany sample excludes former DDR states. USA sample is collected from metropolitan areas of New York, Chicago, LA, San Francisco and Dallas.

The research survey was conducted in a wide target group and the respondents did not know that the survey was about Finland. This provides a good basis for an unbiased analysis

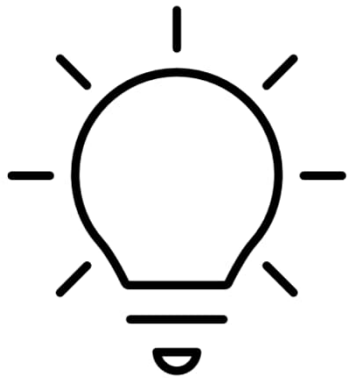
- Germany N=2076
- Spain N=2044
- France N=2000
- Italy N=2000
- Netherlands N=2051
- Sweden N=2000
- UK N=2030
- USA N=2045



WHAT ARE THE KEY LEARNINGS?

Executive summary & key conclusions

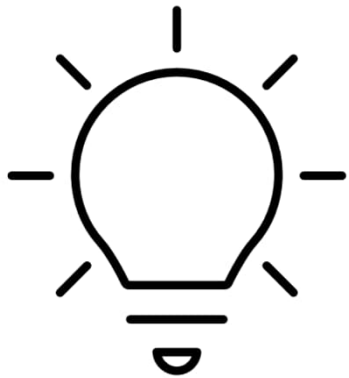
KEY TAKEAWAYS



FINLAND FACES FIERCE COMPETITION FROM OTHER NORDIC COUNTRIES

In a decision making, Finland is most likely to compete with the other Nordic countries. The competition is tough, and it seems that Finland cannot stand out strongly from Norway and Sweden

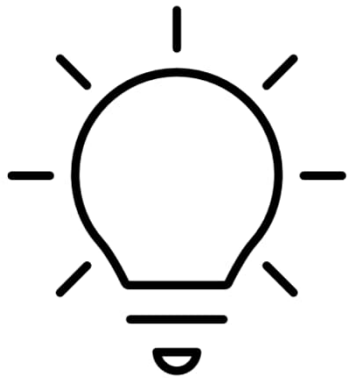
KEY TAKEAWAYS



THE FIRST CHALLENGE IS GETTING ON THE SHORT LIST AS A POSSIBLE DESTINATION

The first important question is how Finland can improve its position so that it ends up in the consideration group of travellers more often. Without getting into the consideration group, Finland cannot be chosen as a travel destination

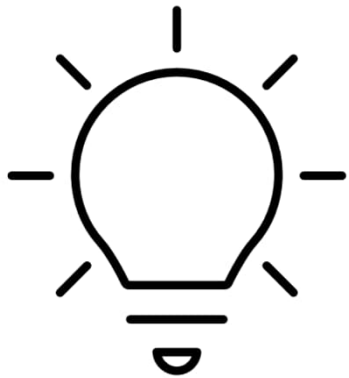
KEY TAKEAWAYS



COOPERATION WITH OTHER NORDIC COUNTRIES WOULD MAKE SENSE

Cooperation with other Nordic countries could be useful in increasing the change to getting into the consideration group, despite the fact that the countries are also competitors. An increase in the attraction of the entire region is likely to benefit everyone

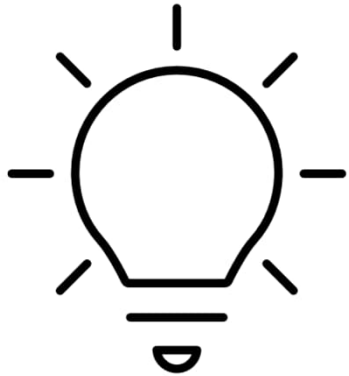
KEY TAKEAWAYS



THERE IS NO SINGLE TARGET GROUP FOR FINLAND
- **THERE IS POTENTIAL IN SEVERAL SEGMENTS**

Finland must be able to provide interesting offering to several different target groups. Focusing strictly on only one narrow target group weakens the reach and reduces Finland's growth potential

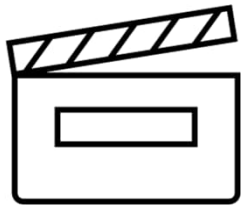
KEY TAKEAWAYS



FINLAND'S OFFERING NEEDS BE **SHARPER AND BETTER TARGETED AT** DIFFERENT SEGMENTS

In order to stand out, Finland's offer must be more strongly focused on the needs of different segments. Differentiation from Norway and Sweden in a relevant and interesting way is extremely important

KEY RECOMMENDATIONS



1. Cooperation with Norway, Sweden and Iceland could make sense to create awareness and relevant demand for Finland more often
2. Make sure your offering and message is sharp and consistent for each segment. Be different in a relevant manner from competitors.
3. Build and structure your communication separately for each segment – everything for everyone is easily confusing
4. Match channels and content for better reach
5. Try to always be available – choice decision are made all the time

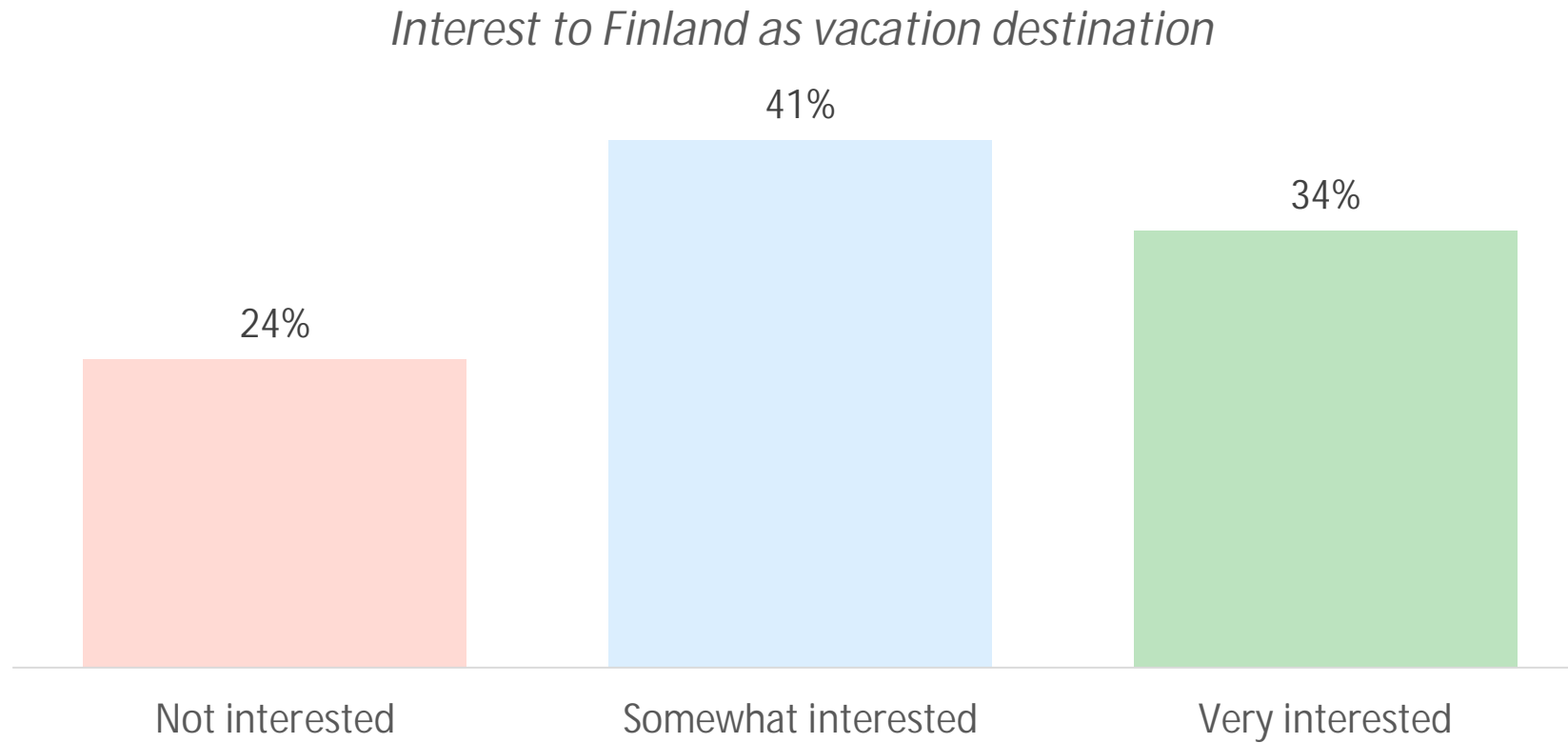


WHAT IS THE MARKET LIKE?

Competitive landscape & Finland's potential

About third are interested in Finland

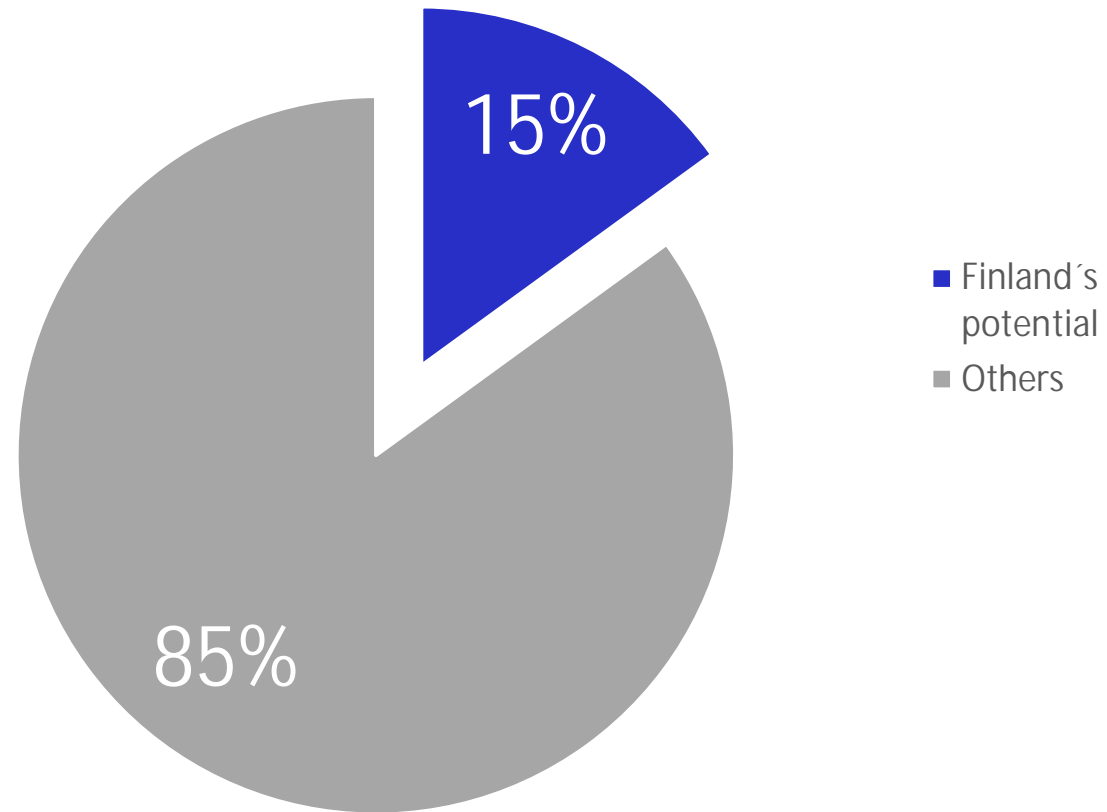
How interested are you in the following countries as vacation destinations?



We estimate that about 15% of all respondents are potential travellers for Finland

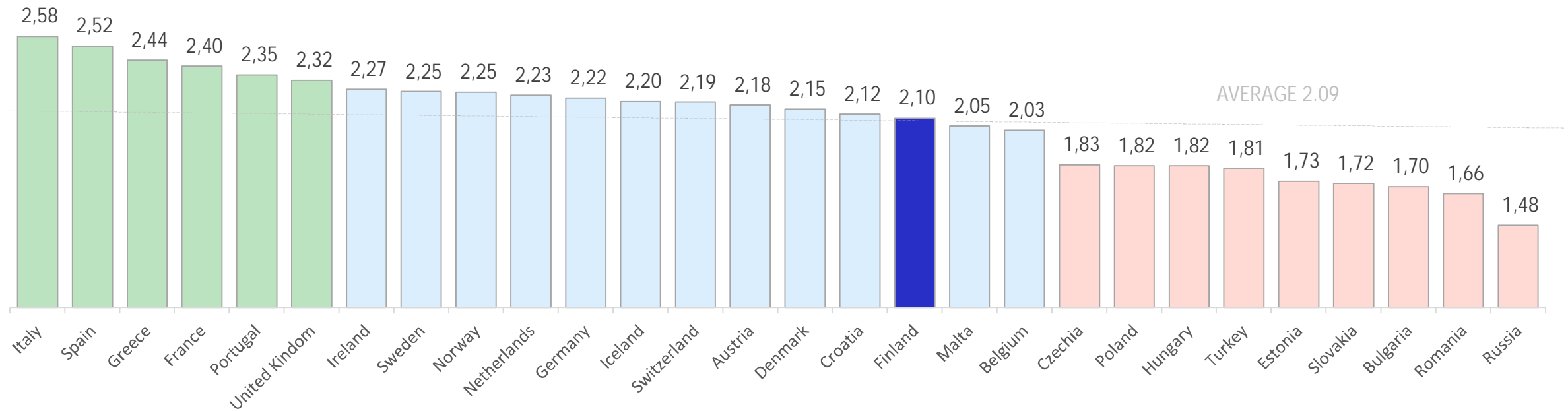
Key assumptions for estimated potential:

- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has a some knowledge about Finland



In terms of interest, Finland ranks a bit below the middle

How interested are you in the following countries as vacation destinations?



What does the market look like through the eyes of the customer?

Data visualisation based on interest correlations



Countries of the same colour belong to the same group in the big picture

The size of the ball indicates the level of interest, i.e. the bigger the ball, the greater the interest

Finland associates first to Norway

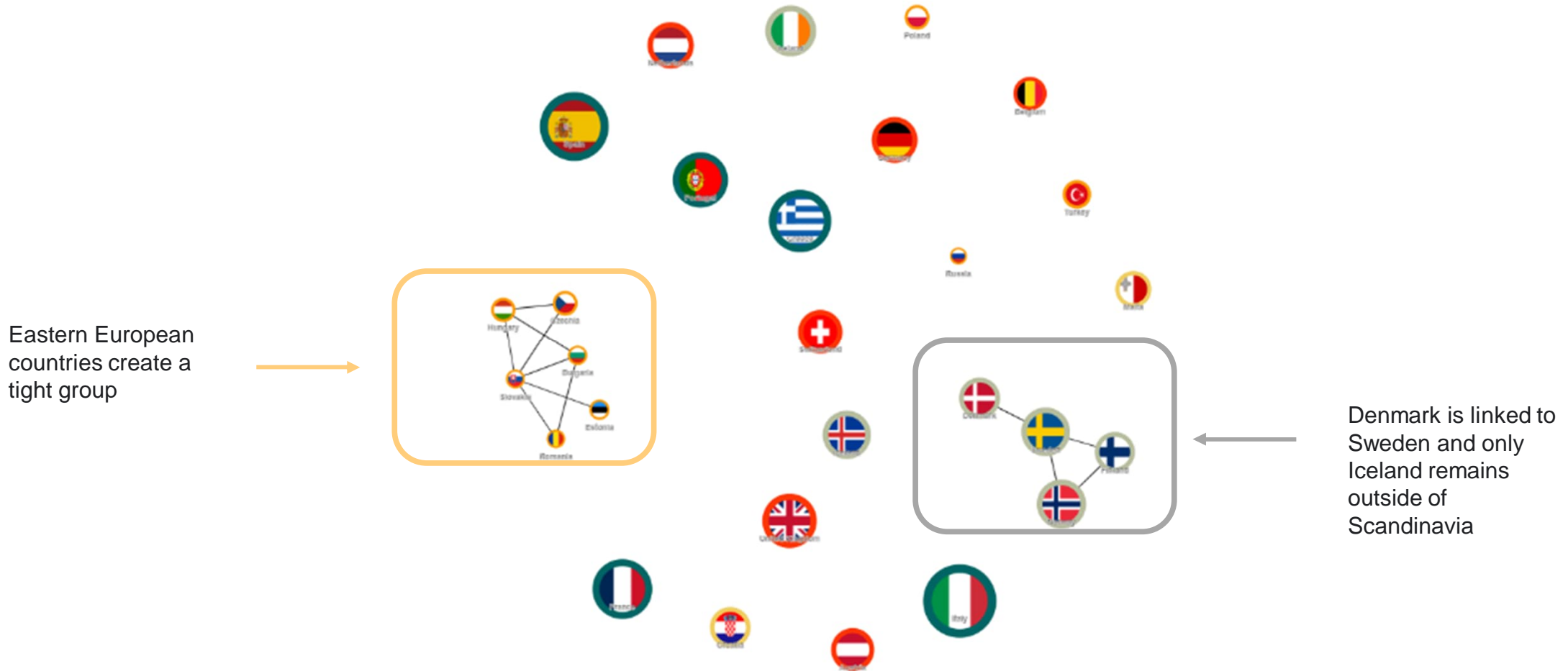
Data visualisation based on interest correlations



Links between countries describe competition. In other words, the same people are interested in Finland and Norway

Finland, Sweden and Norway form a tight group

Data visualisation based on interest correlations

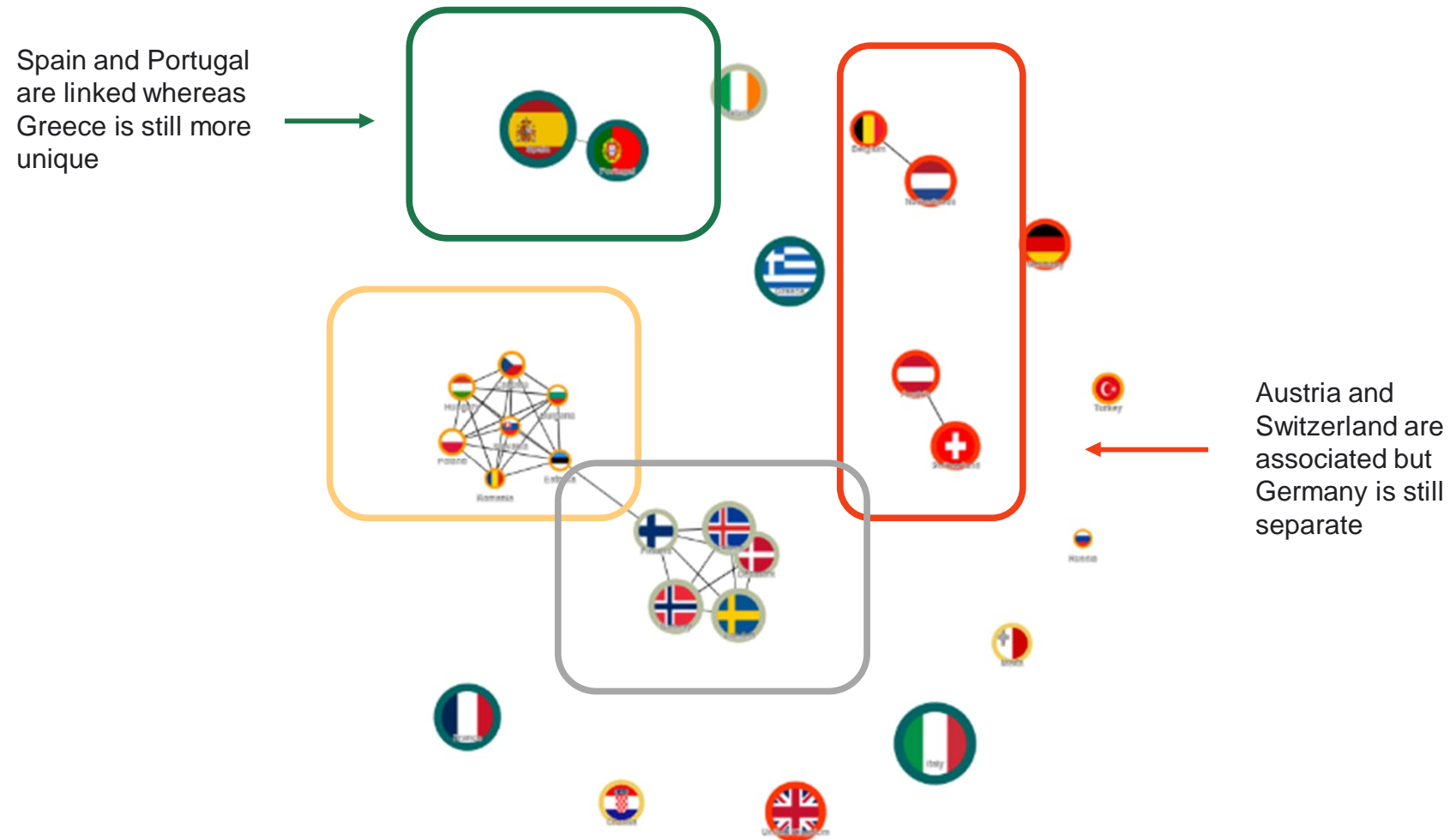


Eastern European countries create a tight group

Denmark is linked to Sweden and only Iceland remains outside of Scandinavia

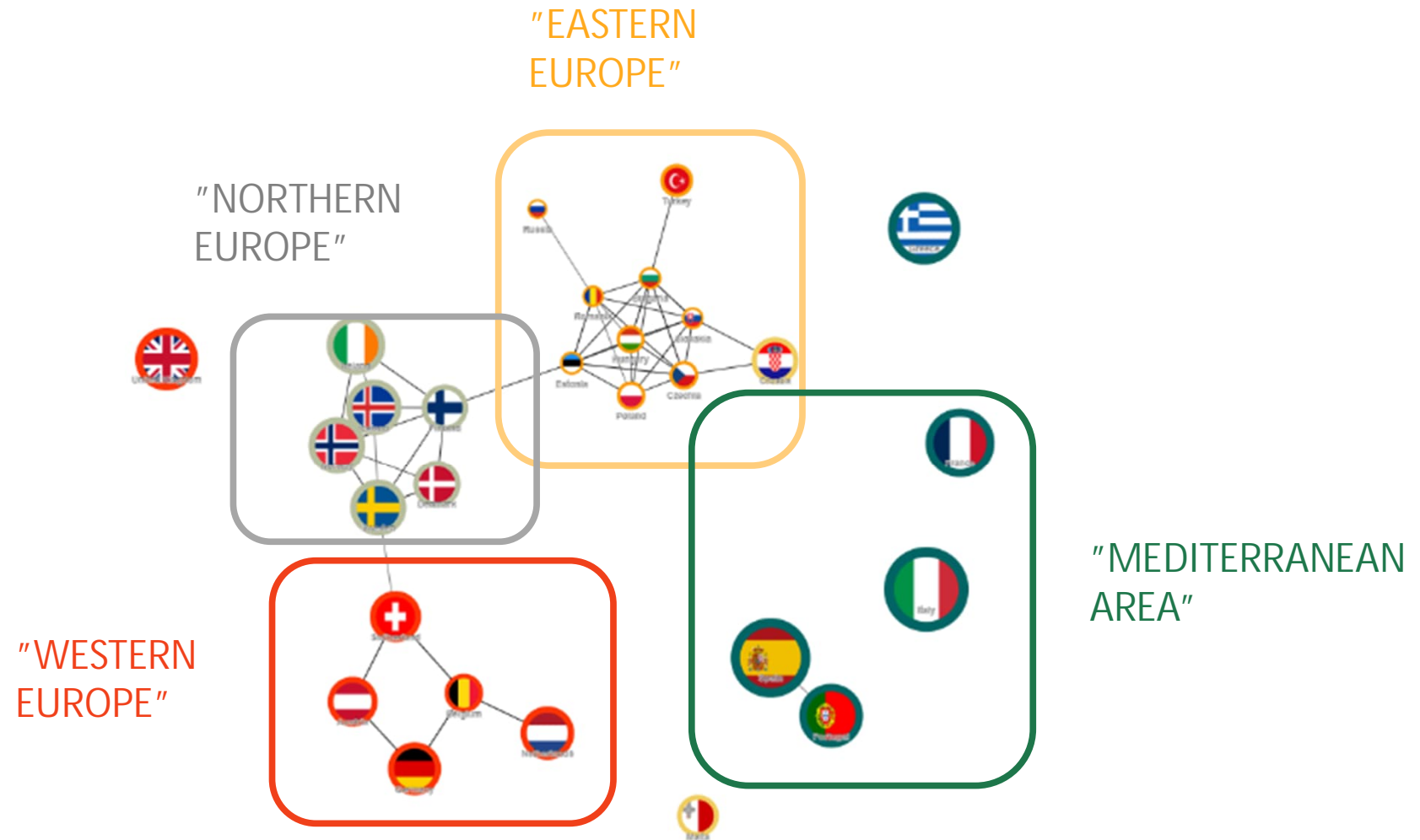
Finland creates a connection to Estonia

Data visualisation based on interest correlations



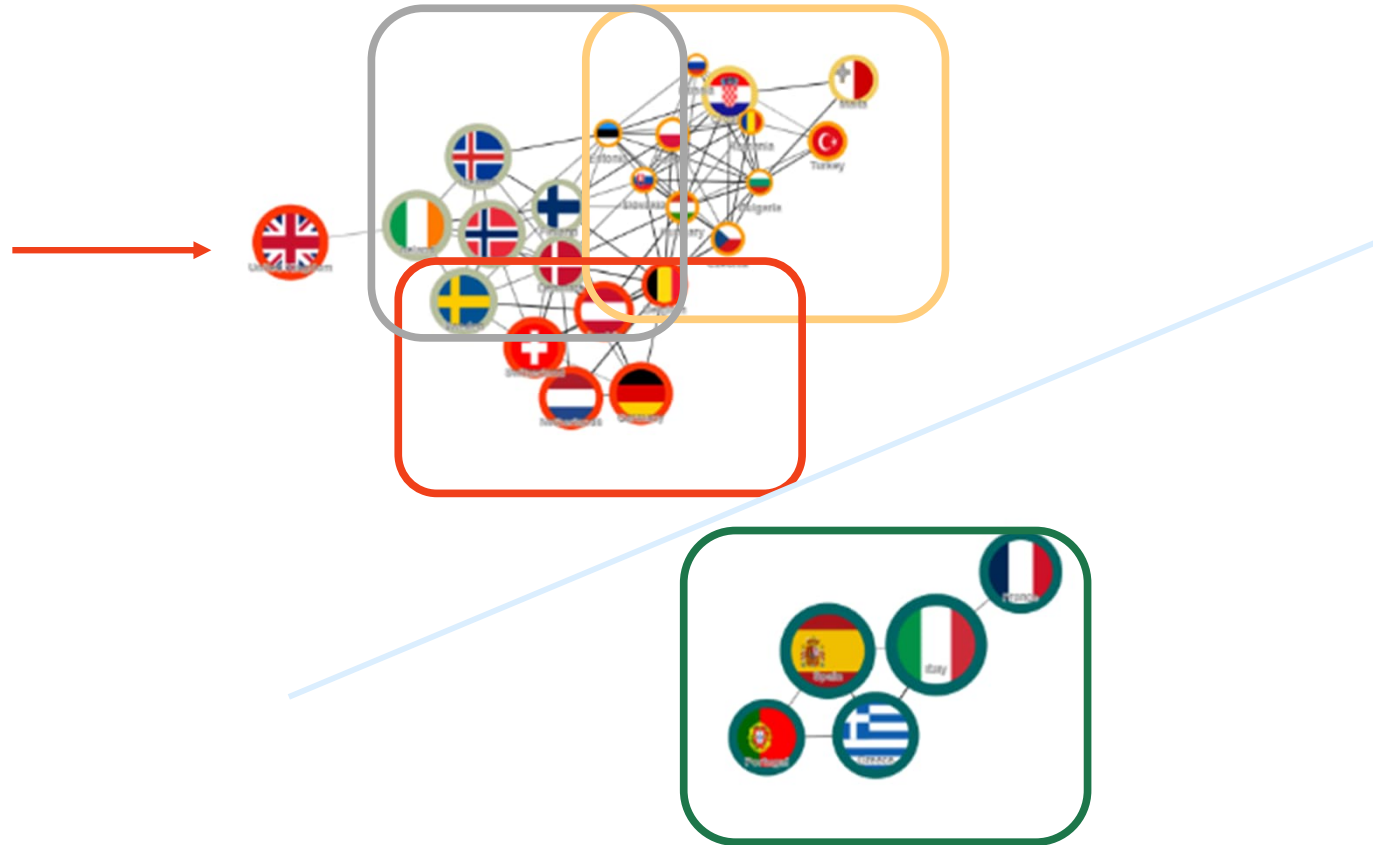
There are clearly four main groups

Data visualisation based on interest correlations



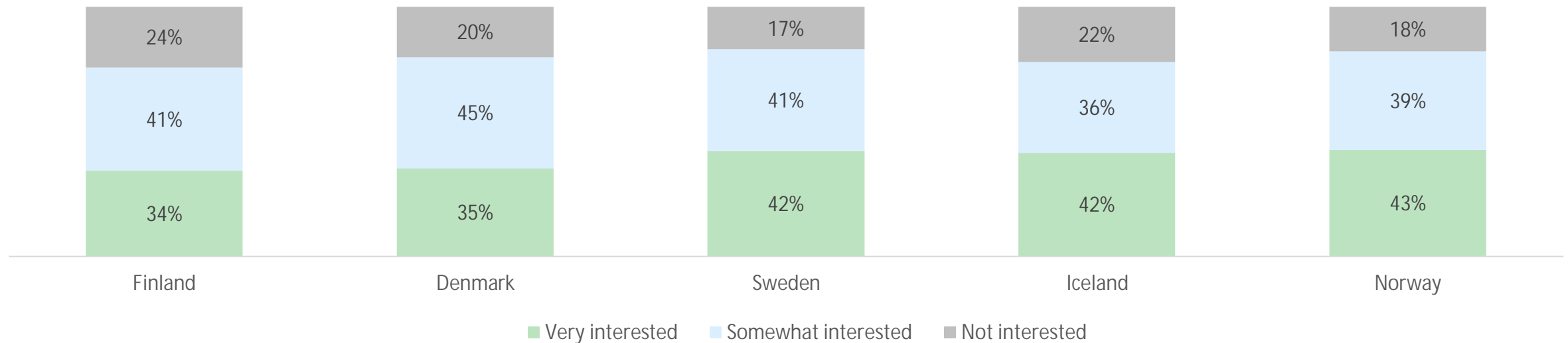
Big tourist countries from the mediterranean area stay separate from the rest of the countries

UK is clearly very unique and associates with Ireland in the end

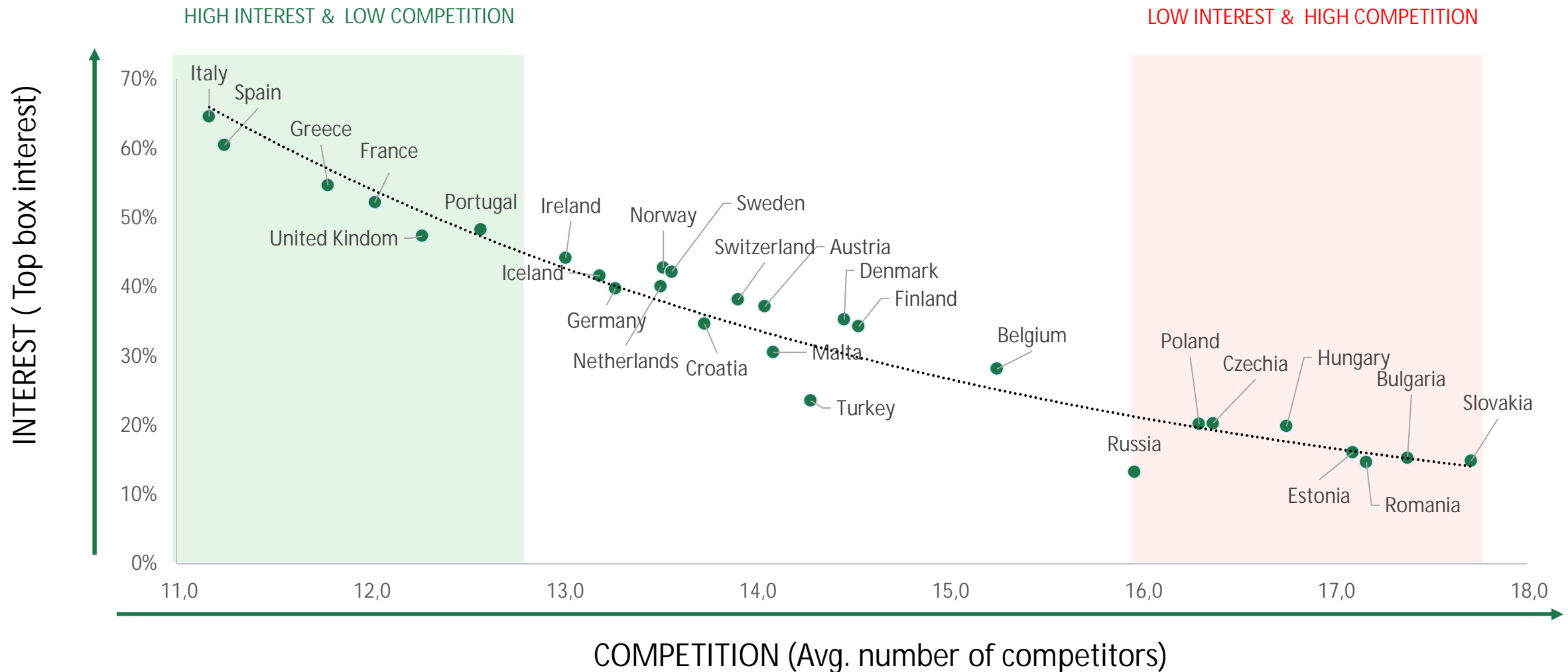


Interest in Finland is slightly lower compared to other Nordic countries

How interested are you in the following countries as vacation destinations?

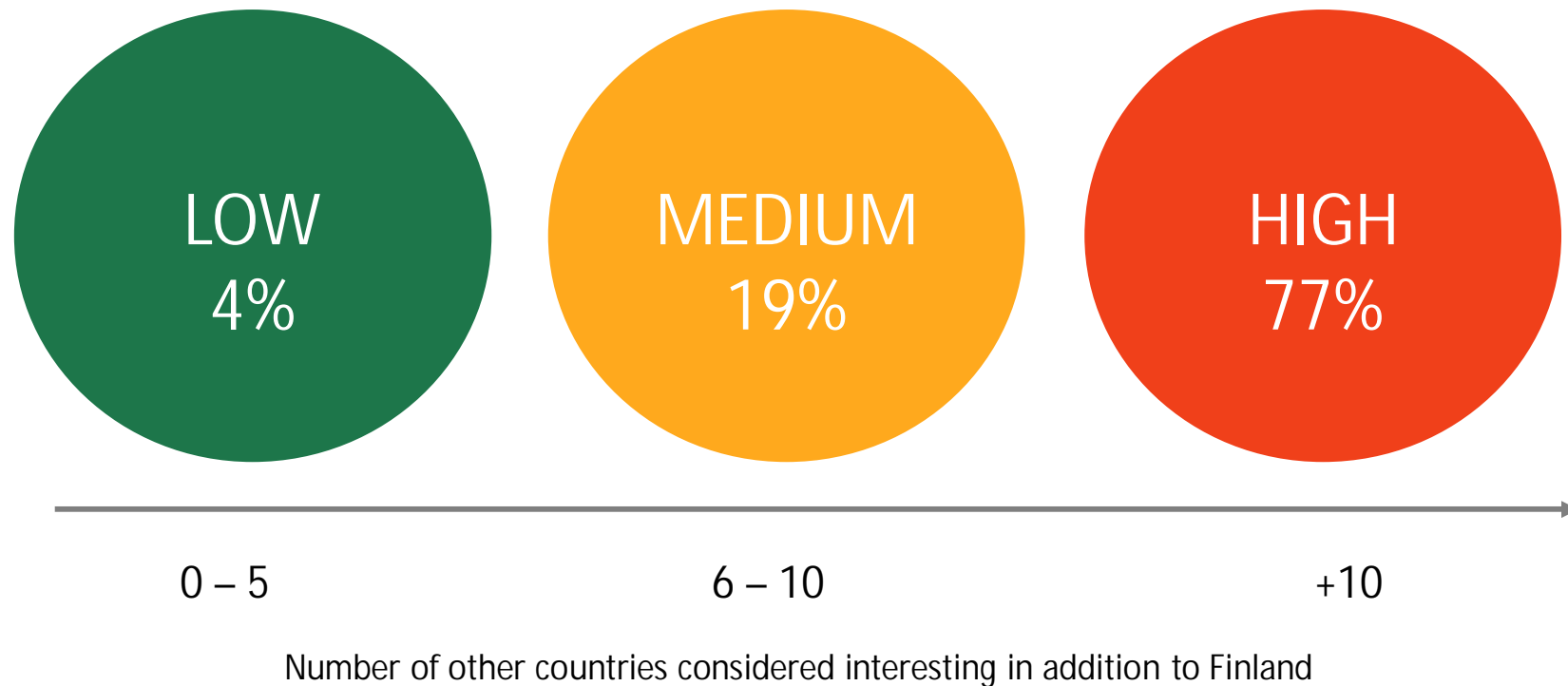


Big well known countries face less competition than small ones



Those interested in Finland have a wide interest in other countries as well

COMPETITIVE LANDSCAPE FOR FINLAND – LEVEL OF COMPETITION



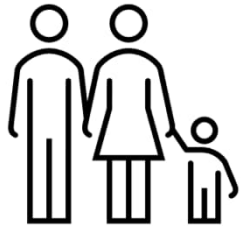


Finland's challenge is **tight competition** more than lack of interest

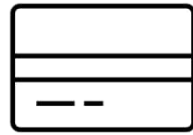
Interest in Finland is on a reasonably good level, but the challenge is that many other destinations are also perceived as interesting. Therefore, the key challenge is competition, especially between the other Nordic countries

Which metrics predict interest in Finland?

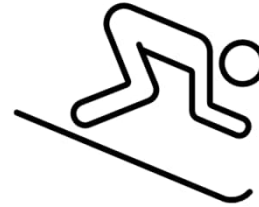
Respondents interested in Finland are more likely to be...



- Millennials* who like to travel with small children as well



- Experienced and well-off traveller

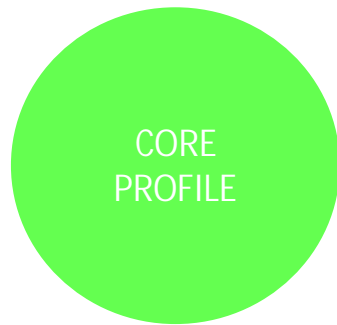


- Interested in traveling during the winter and has interest in arctic nature and winter sports

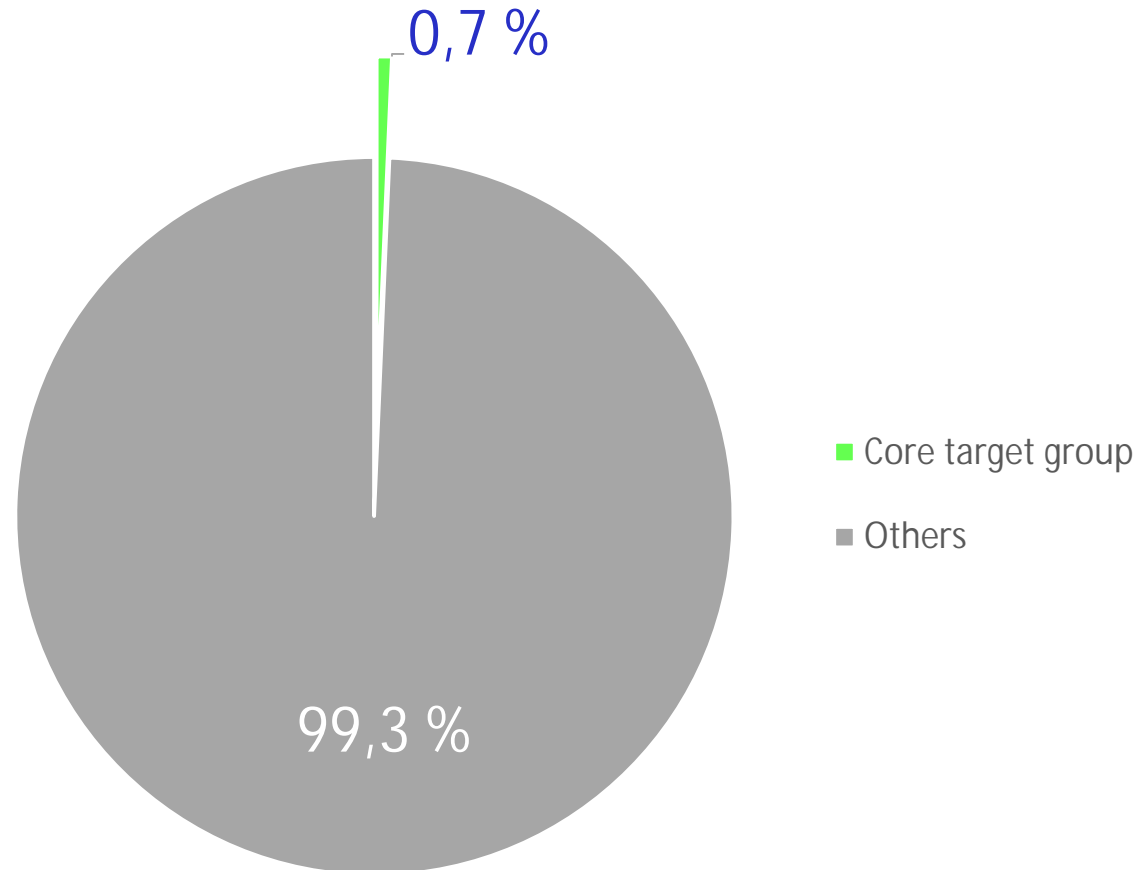


- Open to new things and also likes to make sustainable choices

There are very few respondents that meet all the requirements

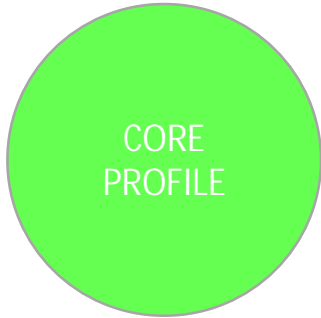
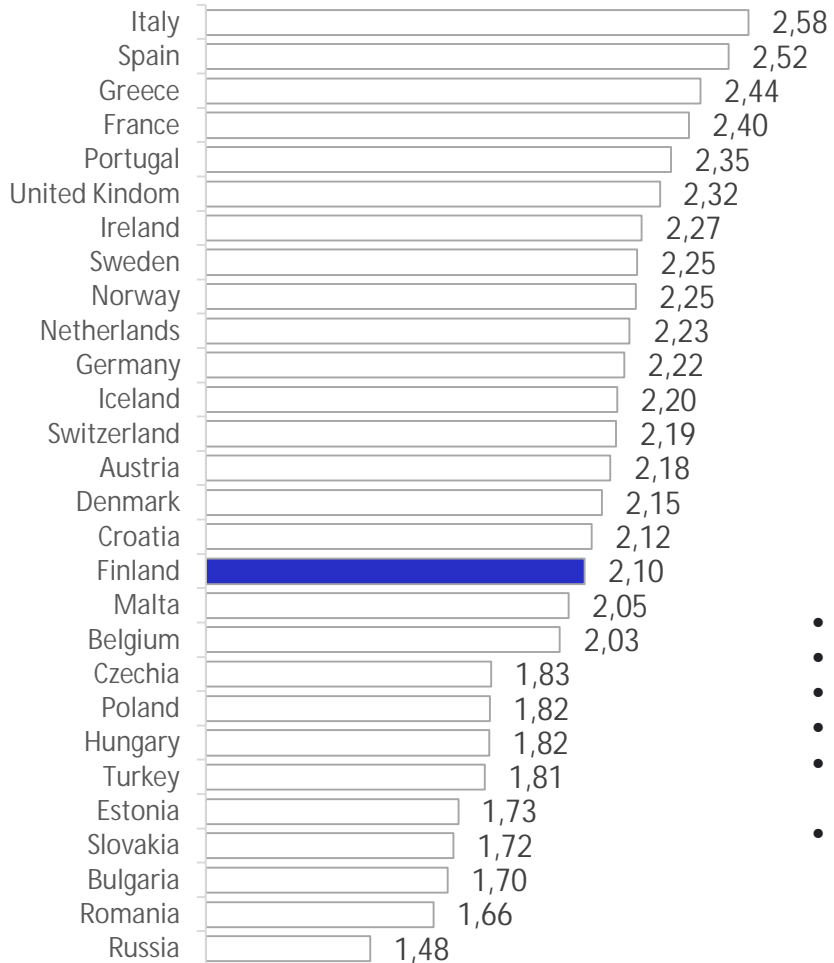
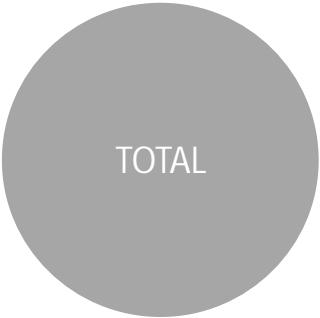


- High income and budget
- Interested to try new
- Interested in sustainability
- Likes to travel in winter
- Likely to travel with young children
- Travels at least once a year

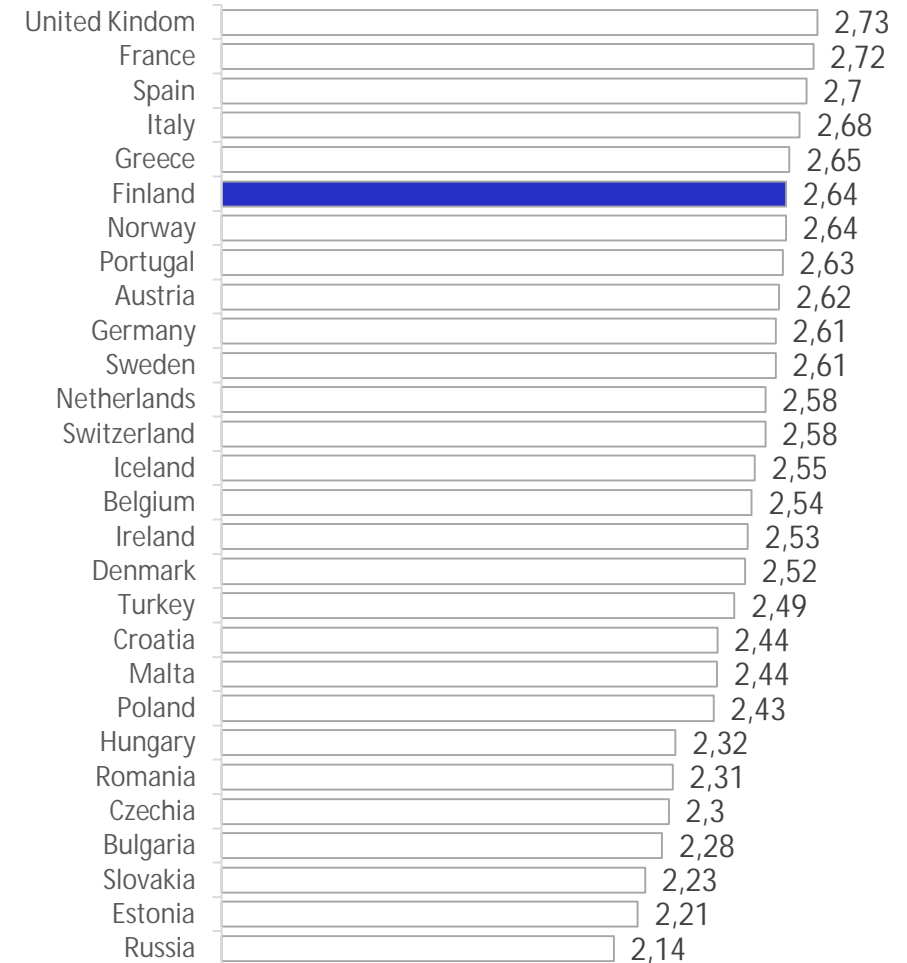


Finland improves its ranking, but the differences get smaller

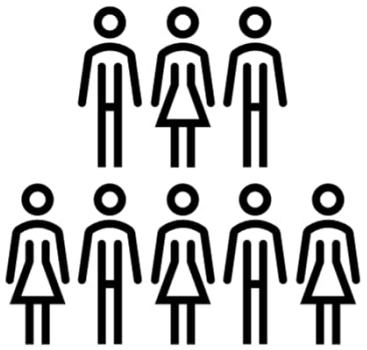
How interested are you in the following countries as vacation destinations?



- High income and budget
- Interested to try new
- Interested in sustainability
- Likes to travel in winter
- Likely to travel with young children
- Travels at least once a year



Average score/ (not interesting, somewhat interesting, very interesting)

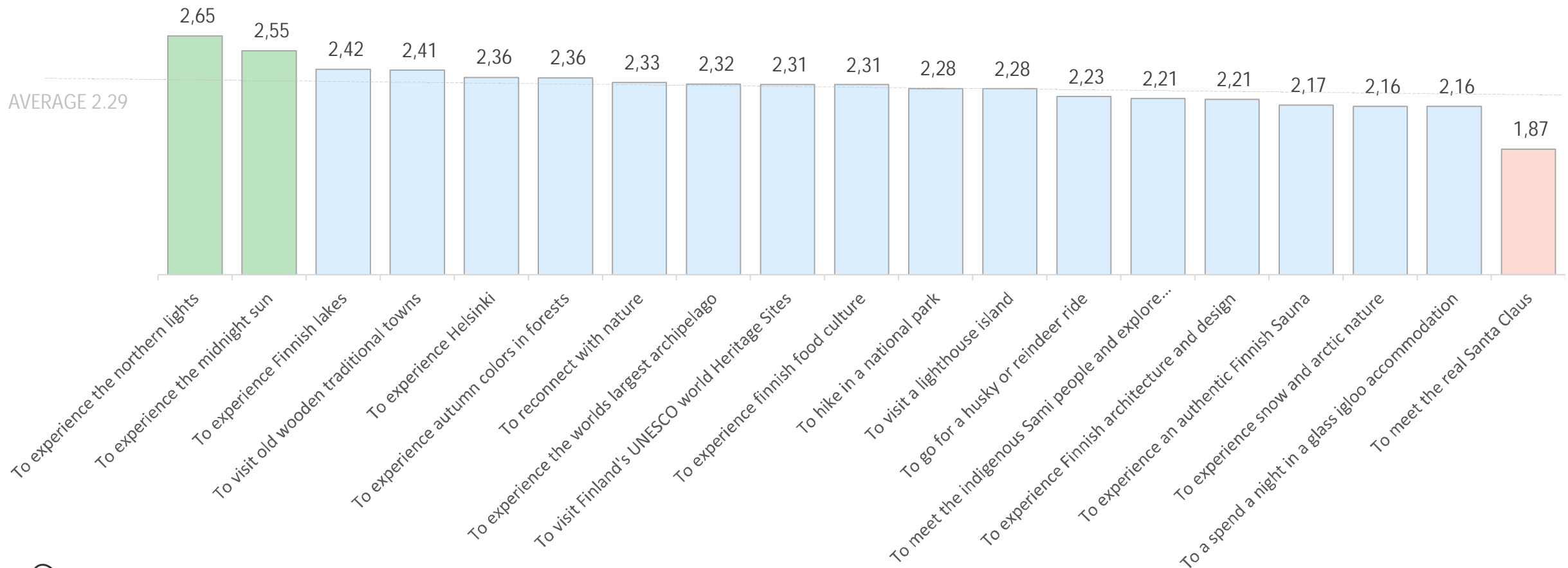


Those interested in Finland do not form **a single consistent target group**

Although we can identify factors that increase interest in Finland, it seems that those interested in Finland do not form one homogeneous group that could be used as a target group for marketing

The northern lights and the midnight sun were the most interesting topics

If you were to come to Finland, how interesting would you find the following destinations and activities?



What did we do?

METHOD & ANALYSIS

We did a factor analysis that grouped the tested Finnish subjects into three different groups. The groups were clearly profiling



- To meet the real Santa Claus
- To spend a night in a glass igloo accommodation
- To go for a husky or reindeer ride
- To experience snow and arctic nature
- To experience an authentic Finnish Sauna
- To visit a lighthouse island

- To meet the indigenous Sami people and explore their culture
- To hike in a national park
- To reconnect with nature
- To experience Finnish food culture
- To experience the world's largest archipelago
- To experience autumn colors in forests
- To experience Finnish lakes
- To experience Finnish architecture and design
- To experience the midnight sun
- To visit Finland's UNESCO world Heritage Sites
- To visit old wooden traditional towns
- To experience Helsinki
- To experience the northern lights

	Culture	Nature	Finnish exp.
To meet the real Santa Claus	0.244	-0.044	0.735
To spend a night in a glass igloo accommodation	0.174	0.299	0.716
To go for a husky or reindeer ride	0.133	0.386	0.667
To experience snow and arctic nature	0.259	0.422	0.588
To experience an authentic Finnish Sauna	0.366	0.166	0.573
To visit a lighthouse island	0.475	0.401	0.393
To meet the indigenous Sami people and explore their culture	0.534	0.298	0.382
To hike in a national park	0.365	0.519	0.312
To reconnect with nature	0.404	0.545	0.304
To experience Finnish food culture	0.633	0.187	0.296
To experience the world's largest archipelago	0.585	0.382	0.294
To experience autumn colors in forests	0.44	0.554	0.271
To experience Finnish lakes	0.484	0.565	0.239
To experience Finnish architecture and design	0.76	0.148	0.231
To experience the midnight sun	0.269	0.724	0.199
To visit Finland's UNESCO world Heritage Sites	0.673	0.343	0.185
To visit old wooden traditional towns	0.598	0.449	0.182
To experience Helsinki	0.678	0.237	0.137
To experience the northern lights	0.181	0.79	0.103

Finland has three main attraction factors



CULTURE



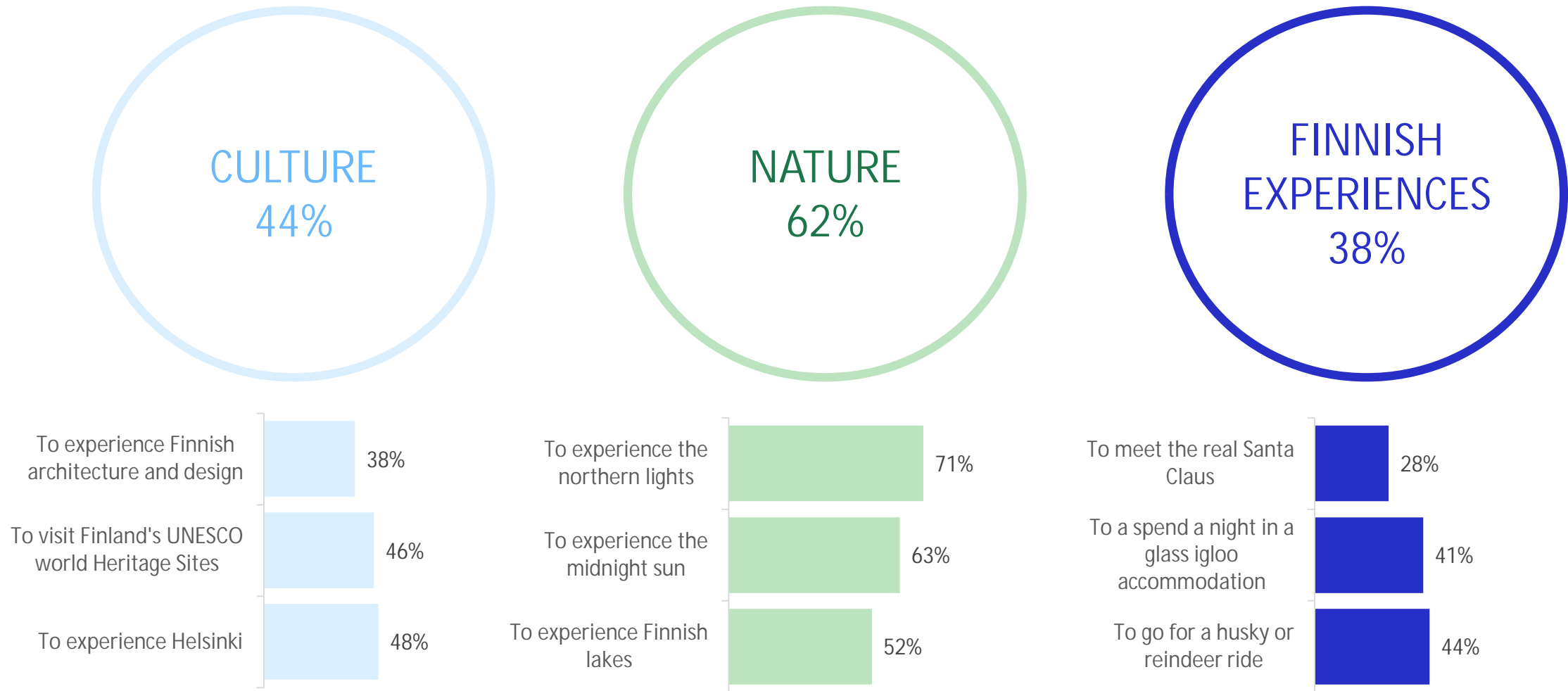
NATURE



FINNISH
EXPERIENCES

Themes related to nature were strongly associated with Finland. Cultural themes and Finnish experiences stood out as other separate entities. It is important to note that the nature theme combines both winter and summer themes. Contrary to what one might expect, the winter themes did not create their own factor. Finnish experiences factor combines unique themes related to Finland such as sauna and Santa Claus. These three top-level entities create a natural foundation for brand work.

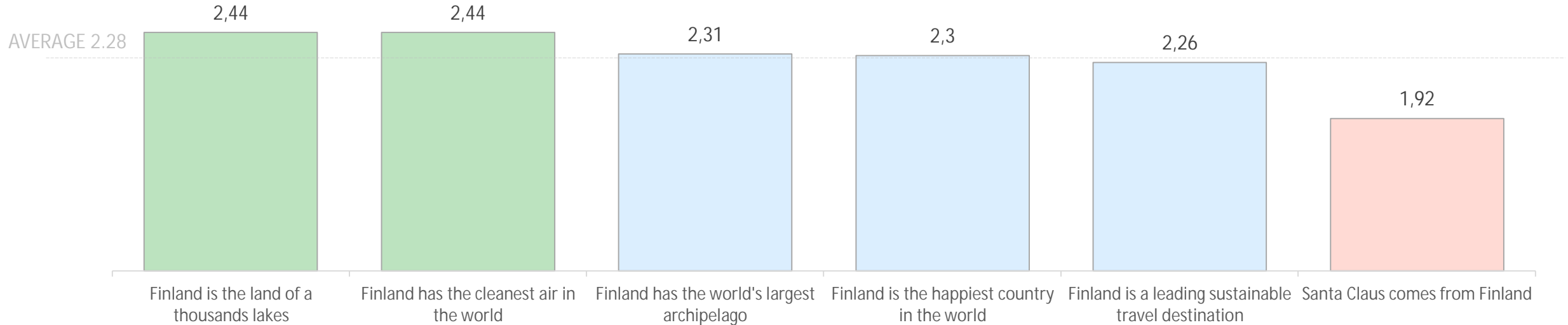
Nature related topics seem to have the highest appeal



Top three most attached topics to each factor/ Share of very interested respondents

Land of a thousands lakes and the cleanest air in the the world are most widely appealing statements

Here are topics that have been linked to Finland and Finns that can be used in promoting Finland as a travel destination. How interesting would you rate the topics to be?

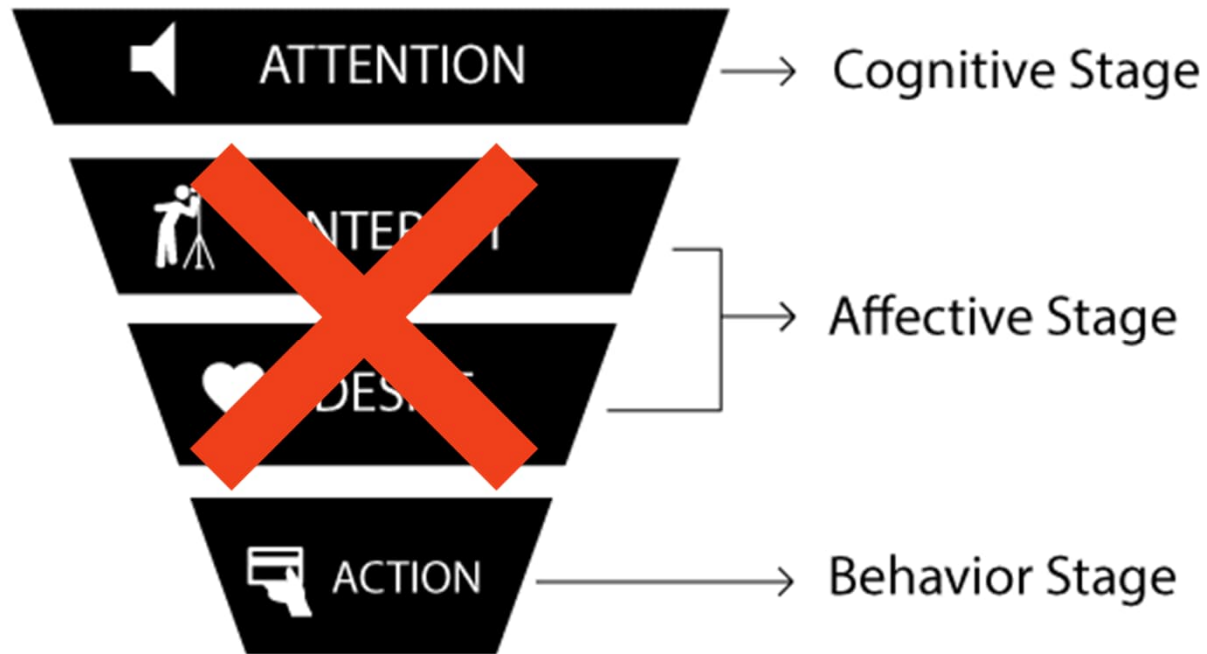




Nature topics are strongly associated with Finland, but culture is also emerging aspect

The statements describing Finland form three overarching themes. Nature themes become stronger as a whole, regardless of the season

Consumer decision making is not a funnel




Outdated marketing theories such as the AIDA model from 1898 create a false impression that consumer decision-making is a funnel. This also creates the idea that there is a core target group that is only interested in one country or object

Our decision making is more like a loop than a path

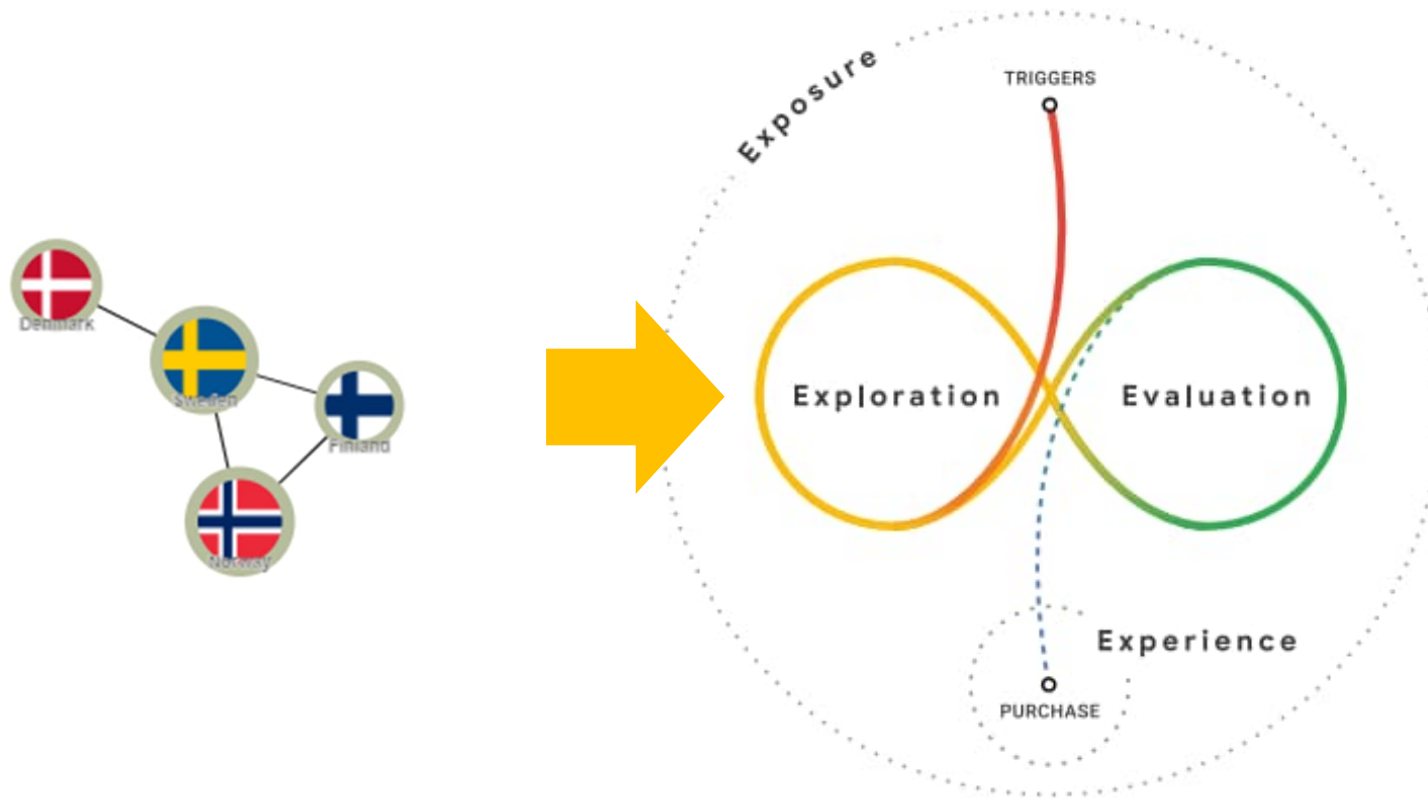


Google's recent research offers a good framework for understanding consumer decision-making as a loop. The framework suggests that we create a selection group for ourselves based on a certain trigger or need



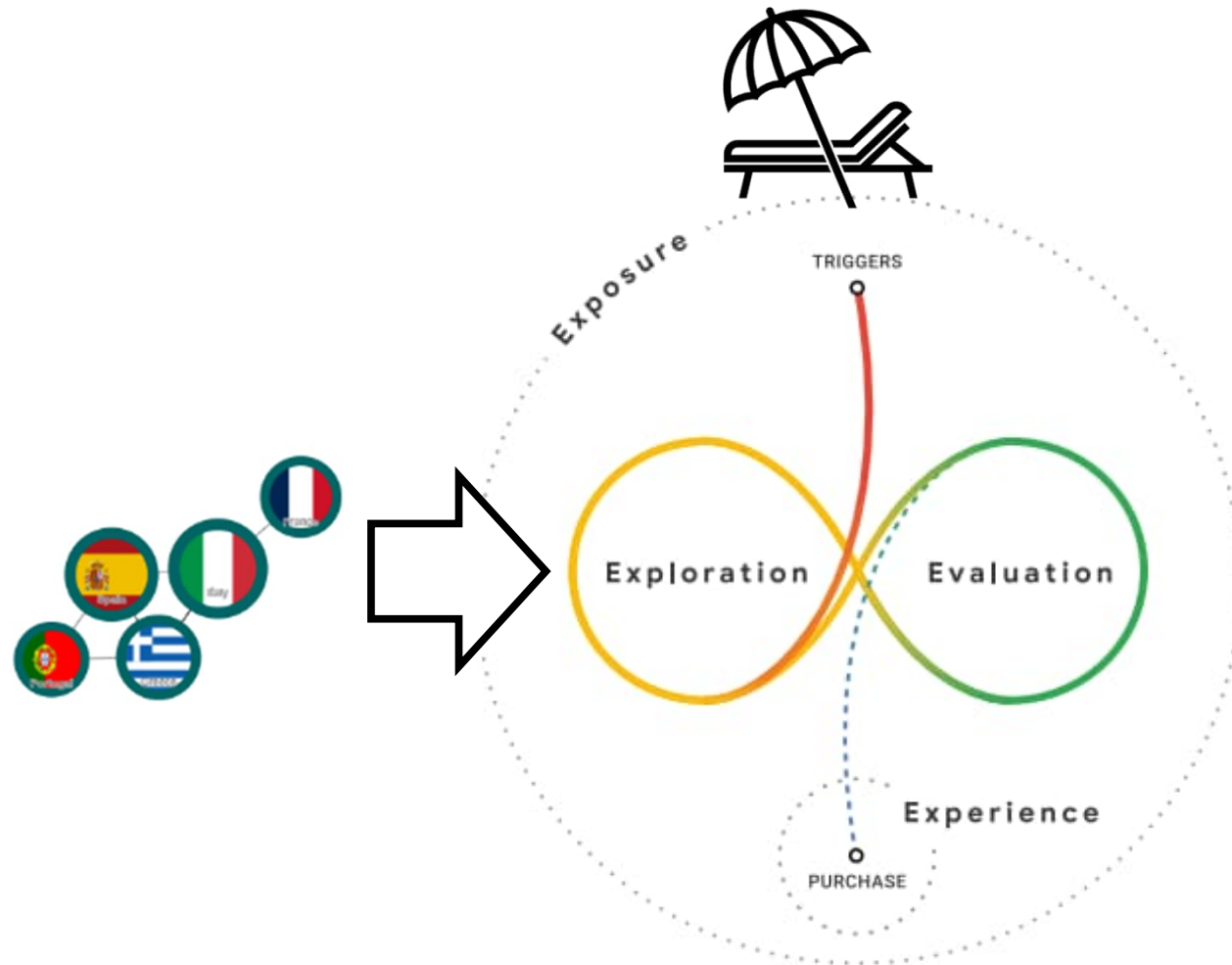
Choice decisions are like lotteries - our task is to increase the probability of being selected

First challenge for Finland is to get in to a consideration group



In the case of Finland, the first challenge is usually to get into the consideration group, and in many cases the need to travel is such that Finland is not being considered as an option

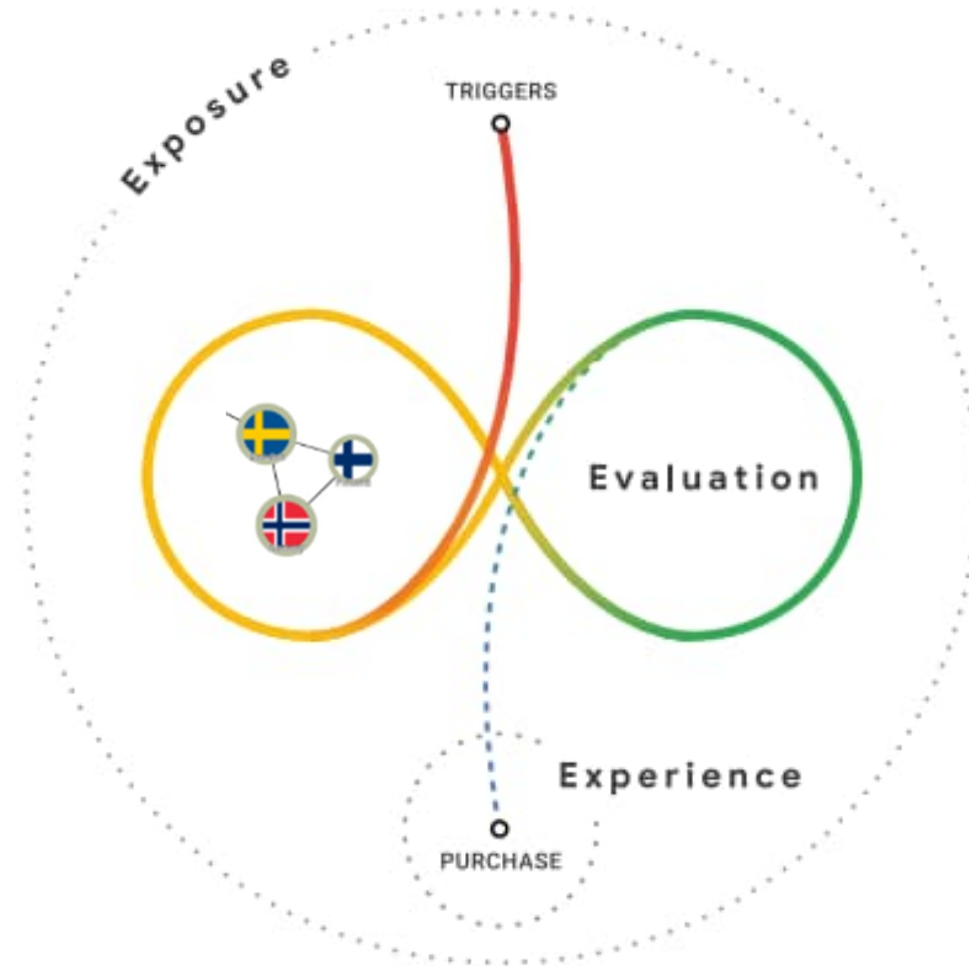
If “sun & beach” is the trigger then Finland is unlikely to be in the consideration group



If the need is e.g. a sun vacation, the choice will probably be made between e.g. Spain, Greece and Portugal.

Because of this, it is important that consumers have such needs that Finland would be associated with and also that Finland comes to mind as an alternative

Second challenge for Finland is to win in competition



The actual competition only takes place when Finland has reached the selection group, in which case the likely competitors at the country level are the other Nordic countries. In this competition, the attractiveness of the offering plays a central role



We need demand that suits us

We should strive to create a demand that is relevant and fits for Finland's offering. In this respect the cooperation with Norway, Sweden and Iceland could make sense to create demand and awareness for Scandinavia.

Key conclusions for the market

There is not a single consistent target group for Finland

The results clearly prove that those interested in Finland do not form their own special target group or segment. Although we can identify themes that profile interest in Finland, they are not factors that determine interest only for Finland, but the same factors profile also those interested in, for example, Norway.

Finland faces fierce competition

Consumer behaviour model clearly shows that those interested in Finland are typically broadly interested in many other destinations as well. This is typical for reasonably small countries, which are interesting for more frequent travellers. Frequent travellers are the ones with the most experience and have a wide interest in many different destinations. This makes Finland's competitive position challenging

Finland has a clear association to nature but that is unlikely to be enough for strong differentiation

The factor analysis identified three overarching themes for Finland. We also study the USP claims used in the marketing of Finnish tourism. Lakes and clean air related USP:s scored a bit above average whereas "happiest country" USP scores only on a mediocre level. Although nature is a profiling factor, Norway, Sweden and Iceland are probably also strong in this



WHAT IS INTERESTING?

Interest area classification

What did we do?

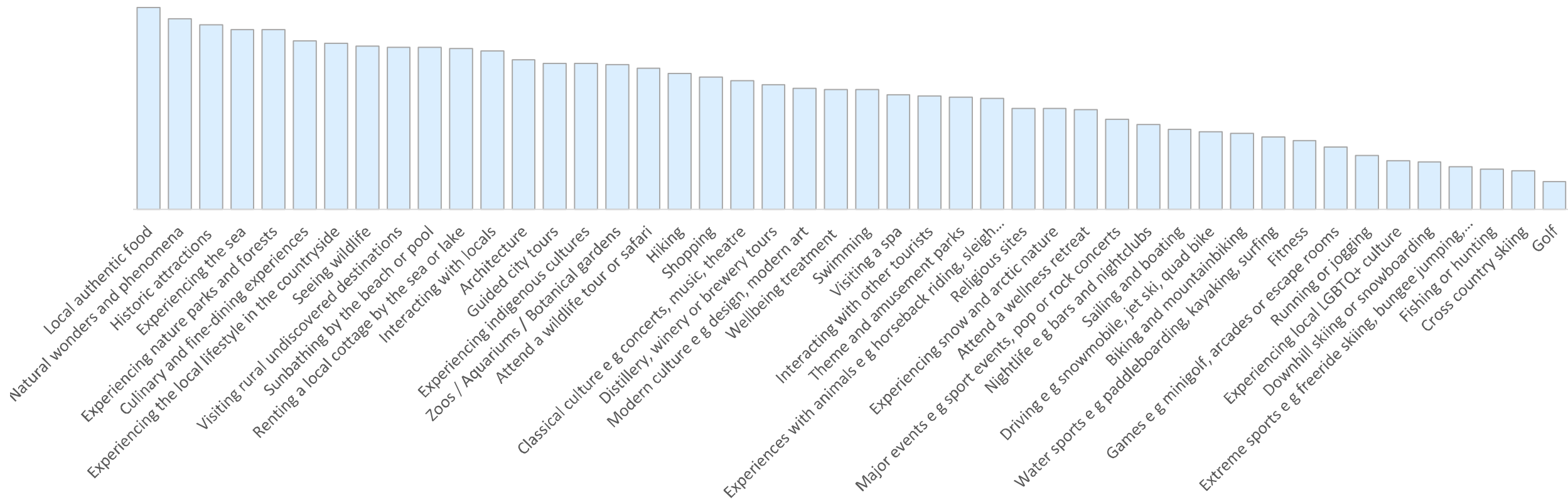
METHOD & ANALYSIS



- We measured a total of 46 objects of interest related to vacations and travelling. These themes were born on the basis of previous research and as outcome from a workshop work of industry professionals
- Each respondent evaluated how interested they were in each of the topics. Based on the responses we modelled the results into a hierarchical form that describes how the interest of different themes are related to each other. In practice close topics for example architecture and design are often liked by the same respondents whereas for very distant topics this is more unlikely to happen i.e interest in shopping vs. interest in indigenous culture
- As a result, we were able to create a model that identifies the most distinctive interest areas in a customer-oriented manner
- We used this analysis as base to describe the most important areas of interest in vacation related travelling and also as a foundation of our traveller segmentation

We measured interest in 46 vacation related topics

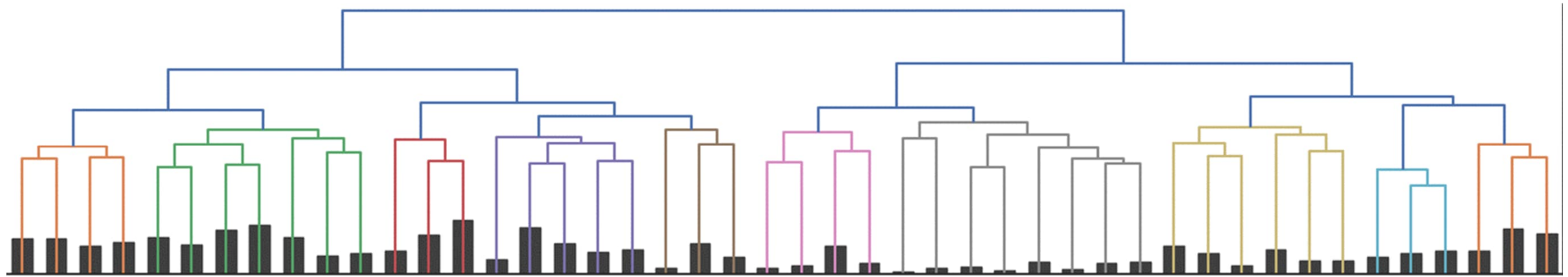
How interesting do you find the following vacation-related topics?



Each respondent was allowed to have several interest areas



We made a customer-oriented model of how different topics are related to each other



On a top-line level there are four main themes



NATURE &
DISCOVERY

Authentic
experiences

Nature
experiences



CULTURE &
LEARNING

Food & drinks

Culture &
history



SPORTS &
ACTIVITIES

Sports &
activities

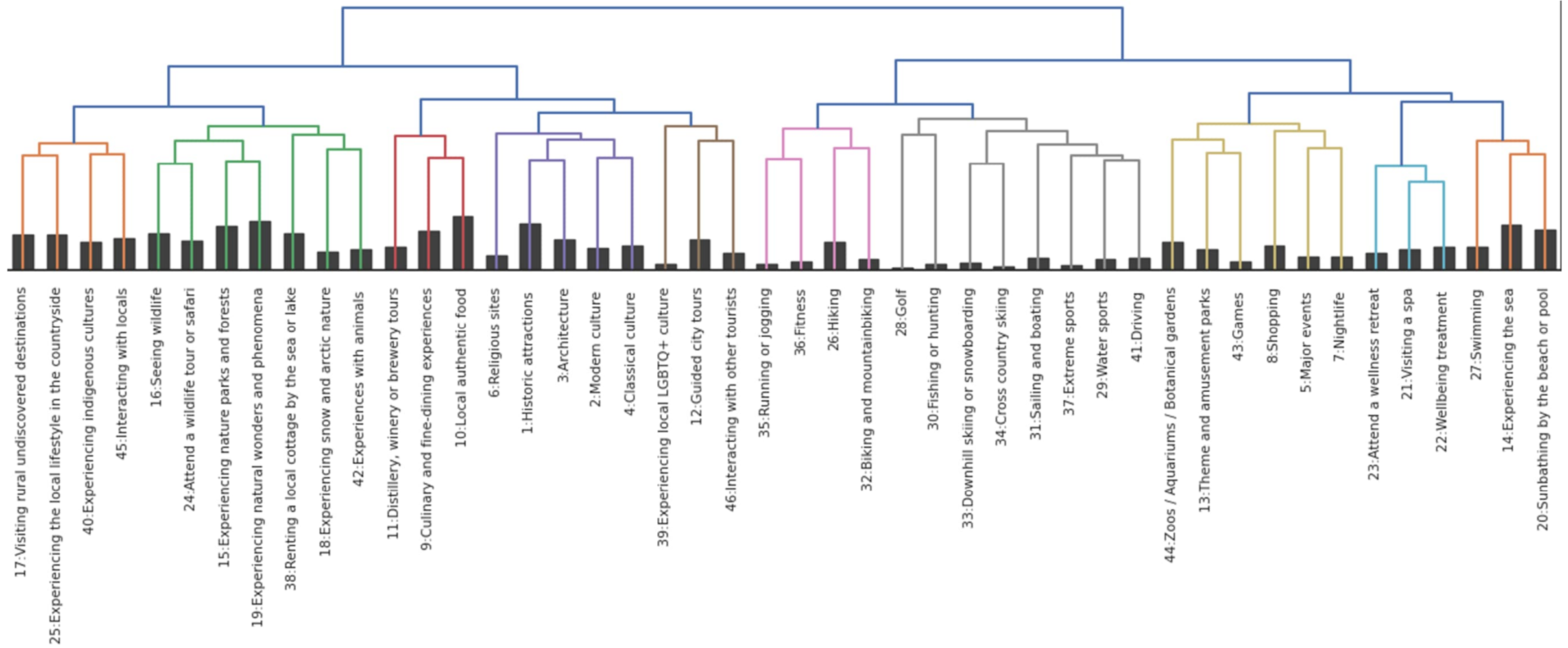


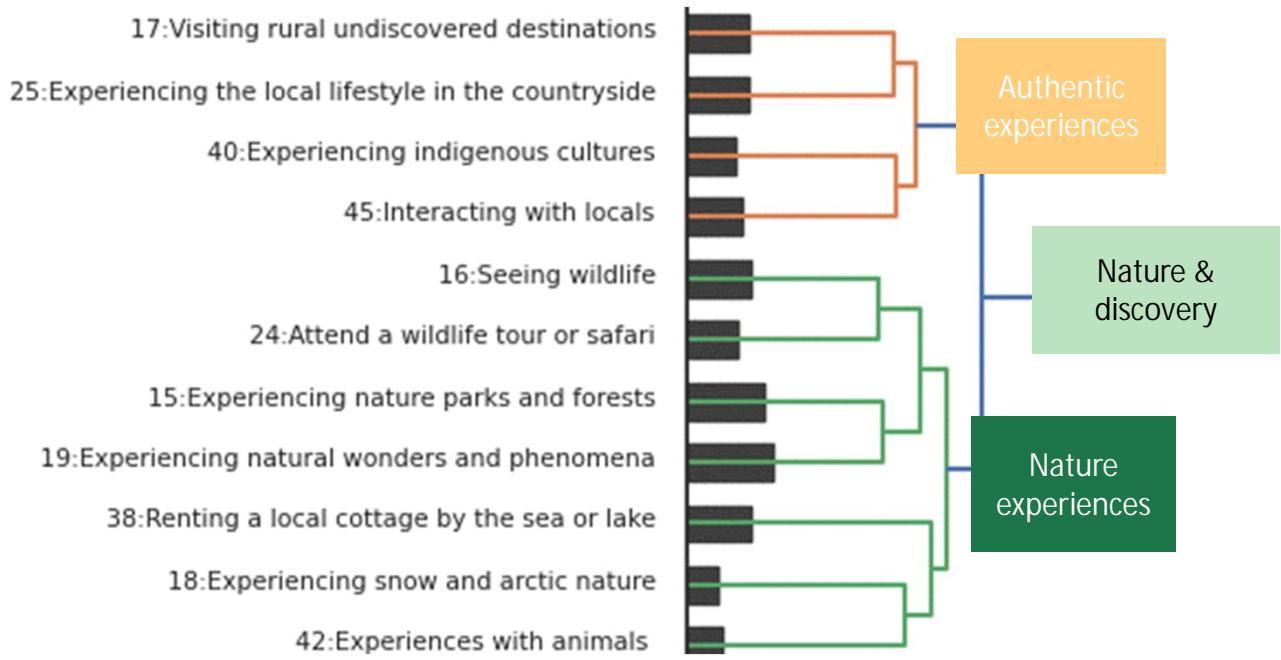
ENTERTAINMENT &
WELLBEING

Shopping &
entertainment

Relaxing &
wellbeing

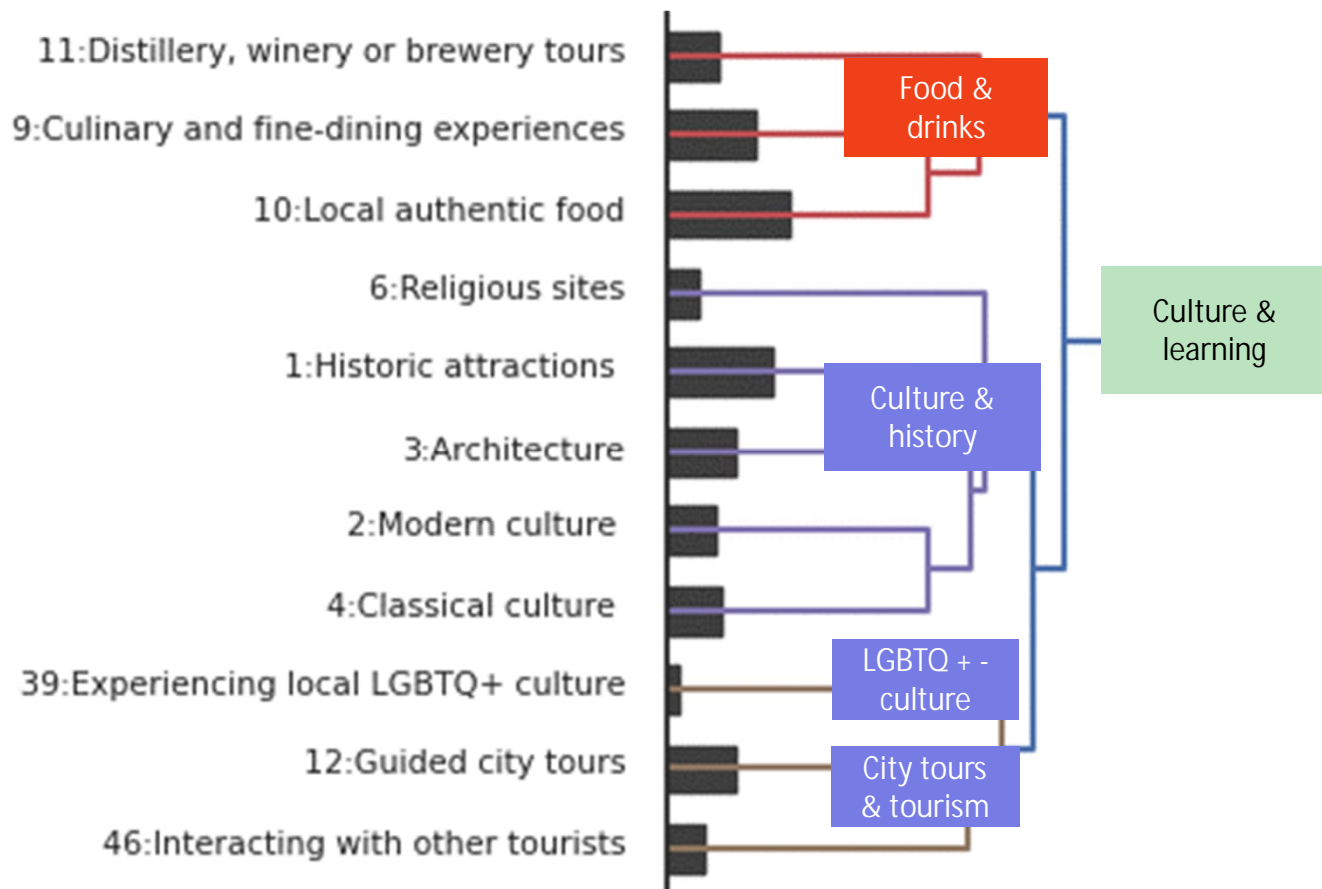
The areas of interest were split into smaller entities





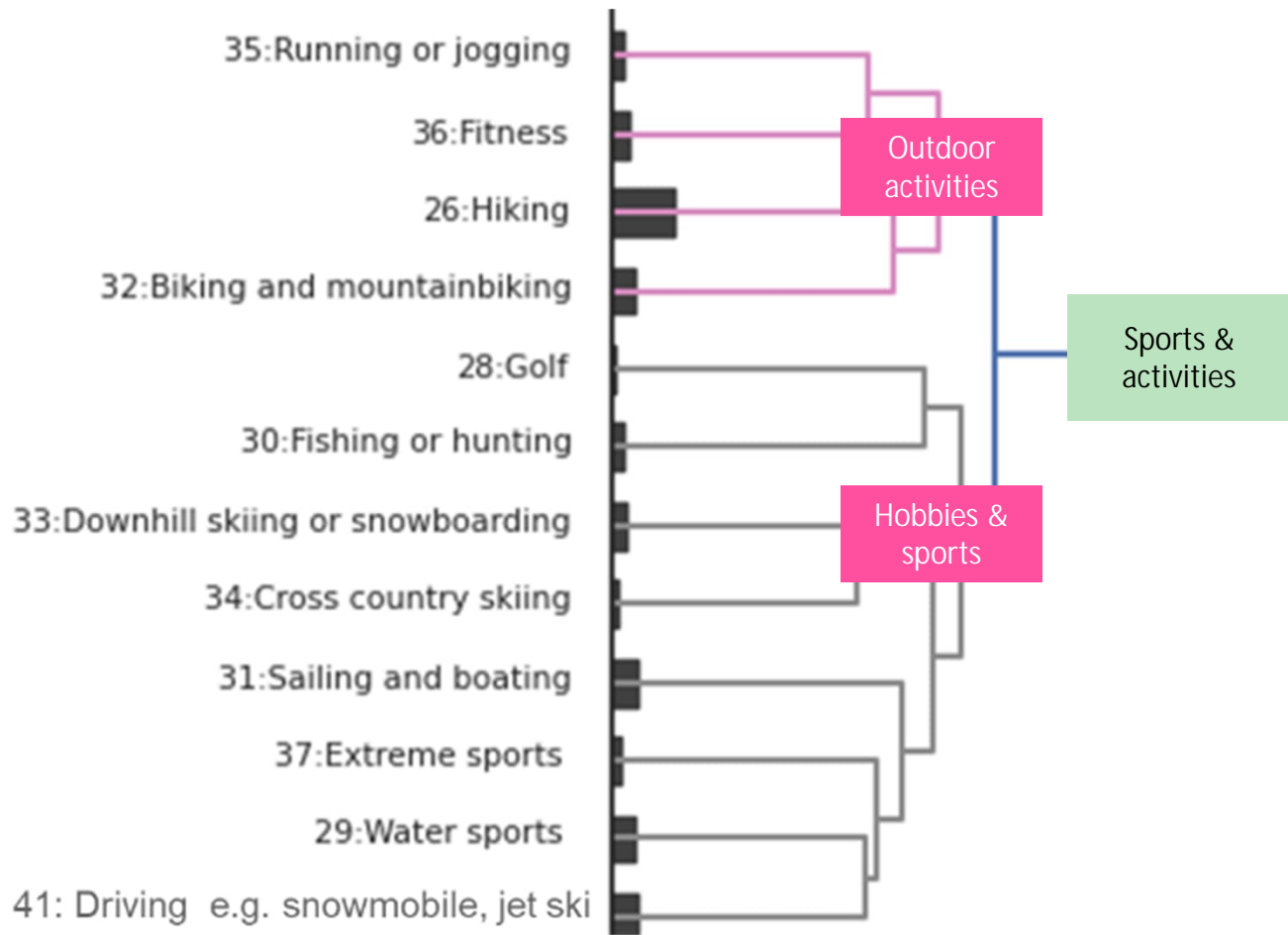
Relationship to nature divides nature and discovery theme in two

The tree model shows how close or distant the different objects of interest are to each other. On one side of the tree are grouped the nature related themes, while on the other side are grouped themes involving the countryside and locality



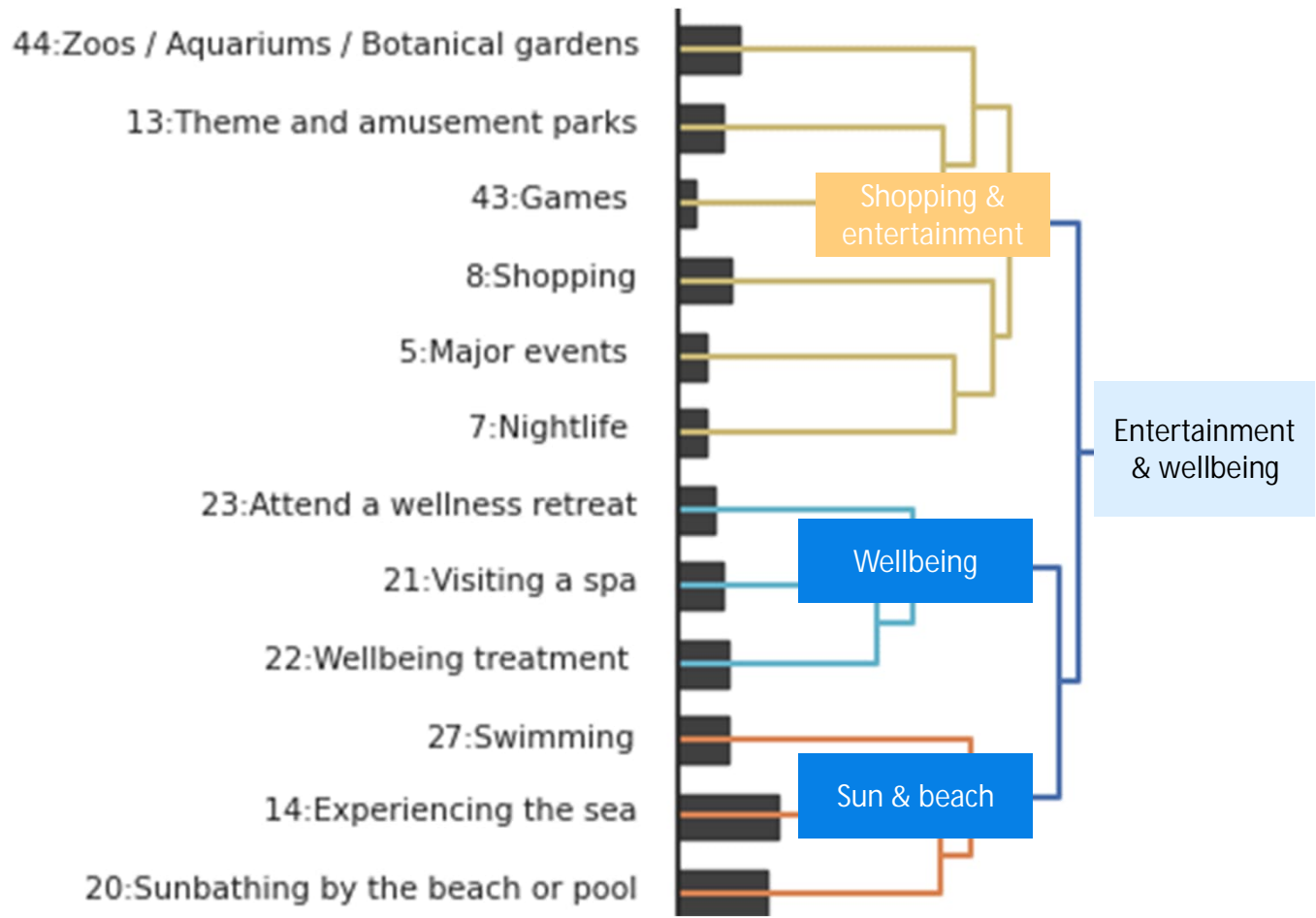
Interest in culture and learning is related to urban environment

Food and drink are grouped into the first entity. The second entity combines history, attractions and different aspects of culture. Religious sites, on the other hand, remain a bit of a separate entity. The last group is the theme of tourism. LGBTQ+ culture quite clearly remains its own small entity



The sports and activities theme is divided into several subsections

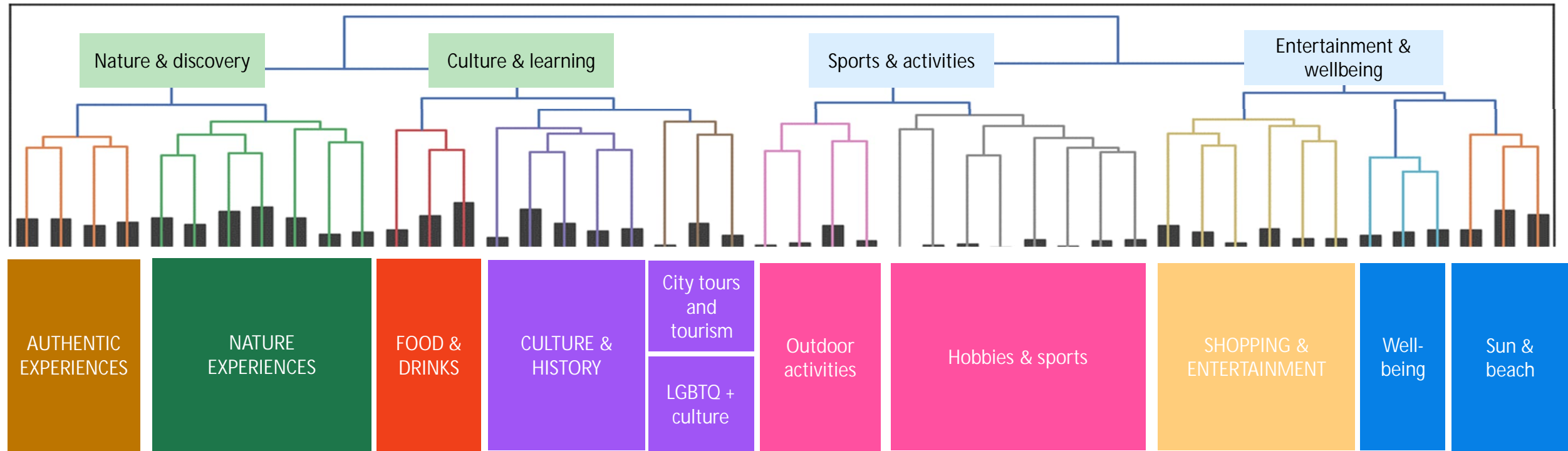
In this research it was possible to measure only a part of the sports, but the results create a clear and consistent picture. Outdoor activities group is created at the top, while winter sports, water sports create their own subgroups. Logically, golf and hunting also interest the same people



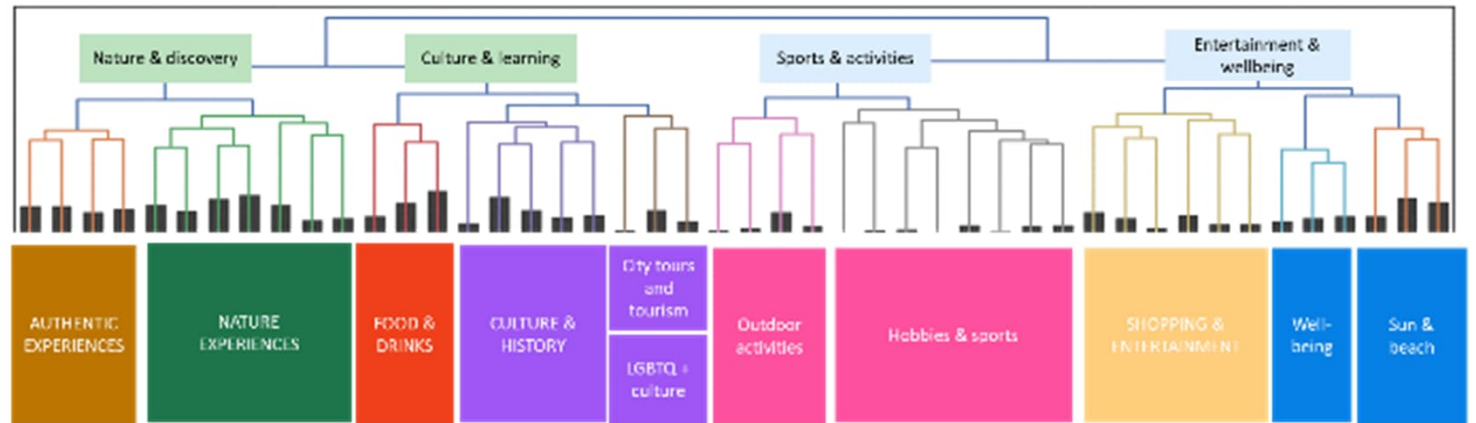
Entertainment and wellbeing theme has both an active and a relaxing side

The entertainment seems to be divided into two sections one aimed at adults and the other aimed more at families with children. Shopping is positioned in the middle. The well-being section is a very clear whole, as are sun and beach, which contains closely related themes such as swimming and sunbathing

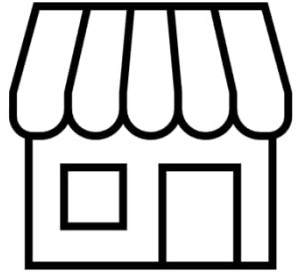
We discovered 11 different areas on interest



If Finland were a store, here would be its departments



Interest classification can be compared to a department store with different departments. So different customers have different interests and grouping gives a picture of the most important departments that the store should have. Following this logic, one could think that Finland should offer something in all these four main areas in order to achieve maximum coverage. On the other hand, individual service provider can choose one area or entity which they focus on

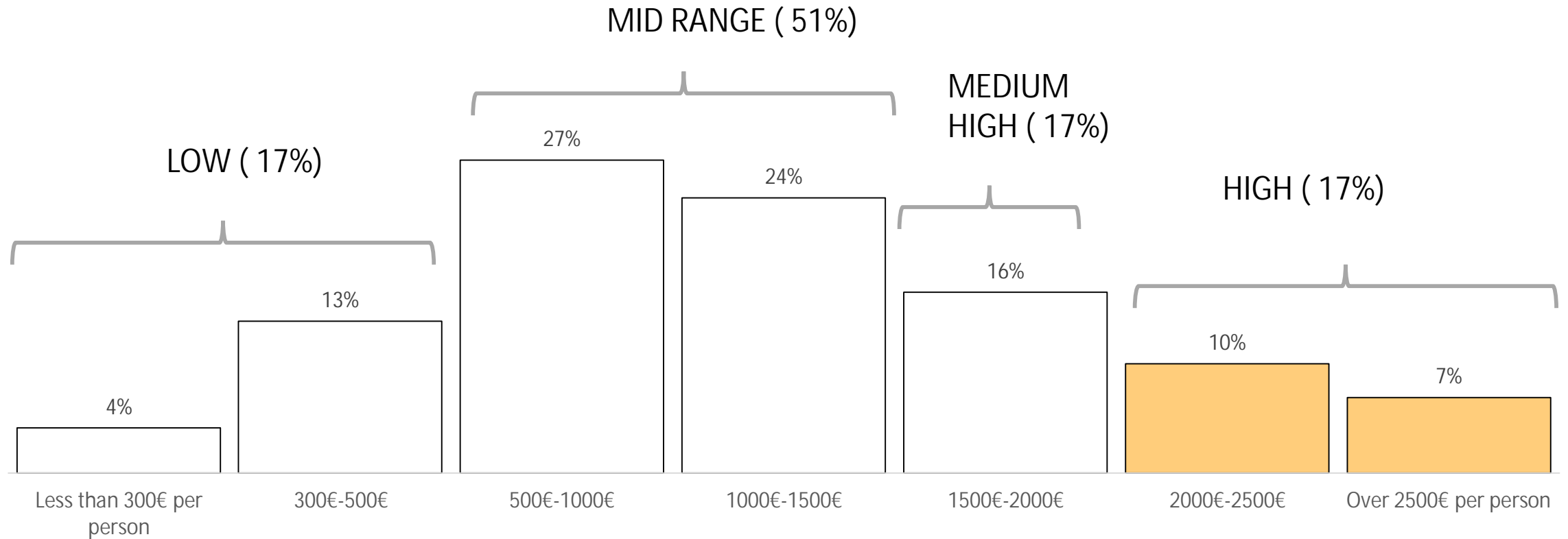


Finland's overall offering should cover **all four main interest areas**

By grouping measured topic, we identified 11 different areas. Ideally, Finland should be able to have offering for all these areas or at least to four main themes. Instead, an individual service provider can very well focus on one narrow area

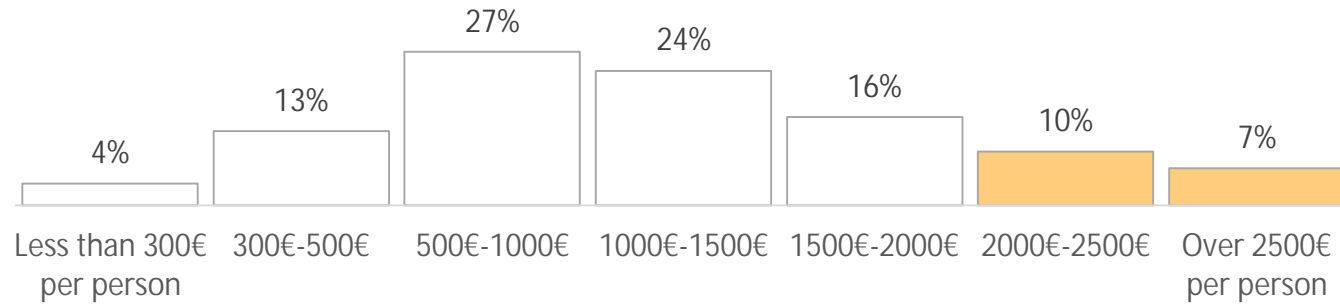
Estimated budget for a trip to Europe

Estimate a likely budget per person for most likely trip to somewhere in Europe

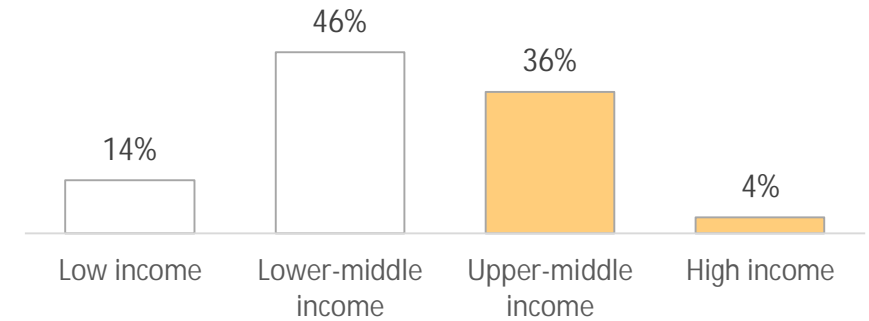


Travellers with a high purchase power

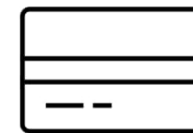
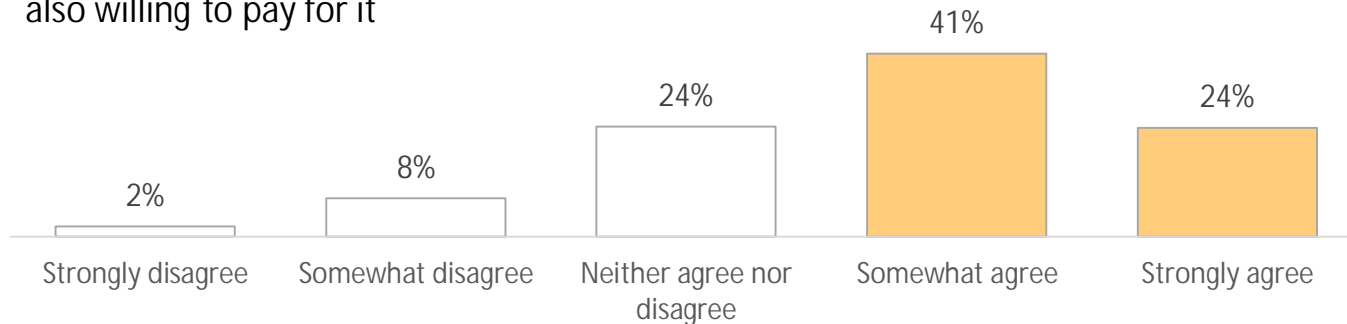
Estimate a likely budget per person for most likely trip to somewhere in Europe



Which of the following best describes your current income level?



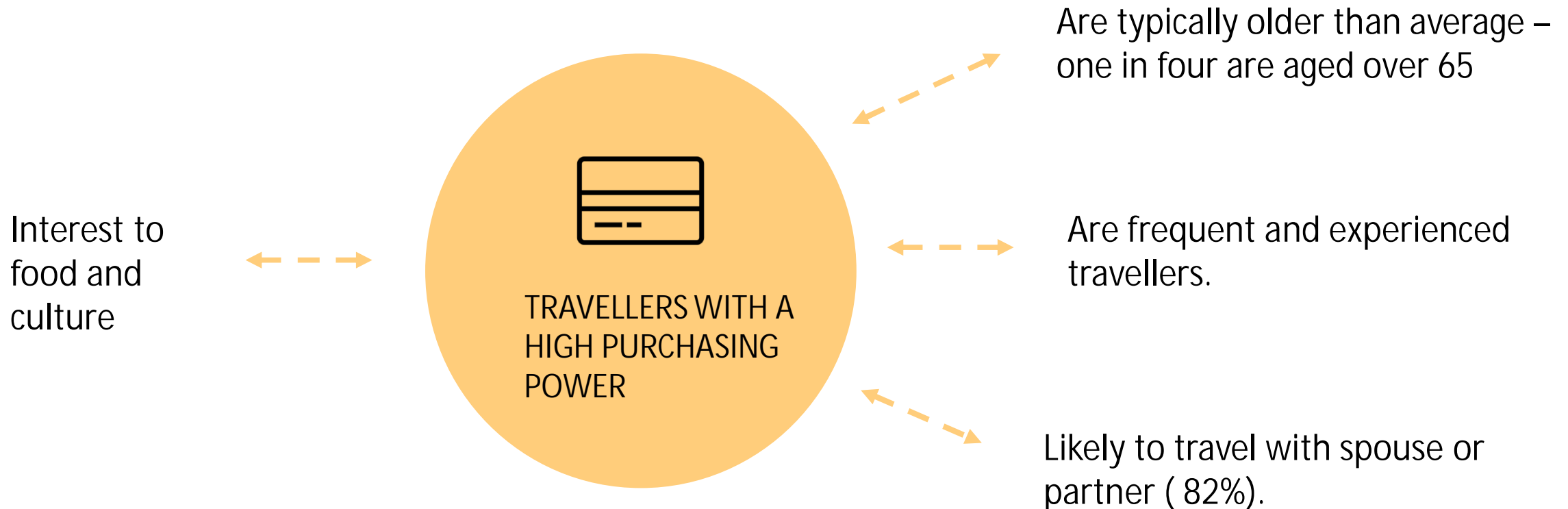
I value high quality service and I'm also willing to pay for it



TRAVELLERS WITH A HIGH PURCHASING POWER

We defined the target group as respondents with at least upper-middle income level, a travel budget of more than €2000 per person to Europe and willingness to pay for quality. The share of these respondent were about 8% in our sample

What is typical for travellers with high purchasing power?



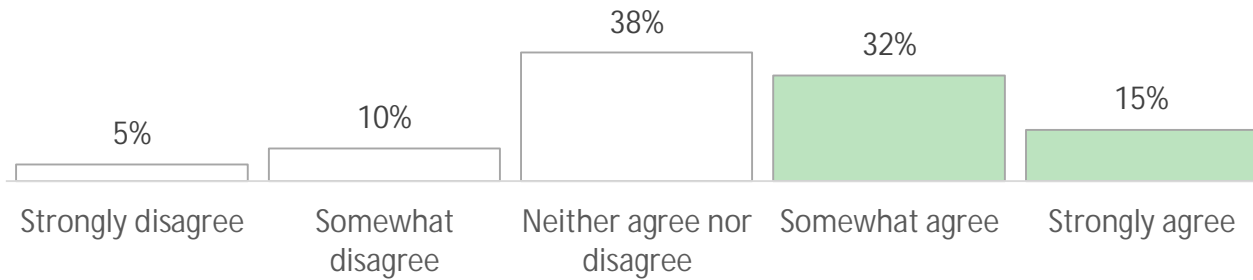


Culture and food appeal to travellers with strong purchasing power

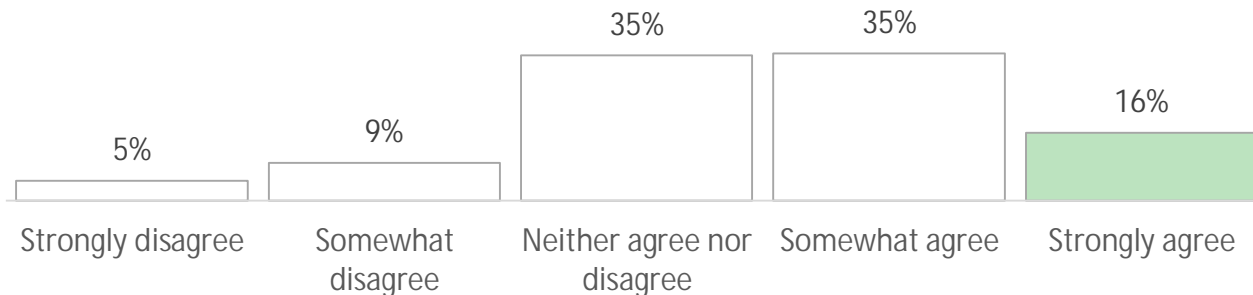
Travelers with strong purchasing power are profiled as active and experienced travellers. It also seems that the share of tourists with purchasing power increases in older age groups. However, travellers with high purchasing power do not form one homogenous target group

Sustainable travellers

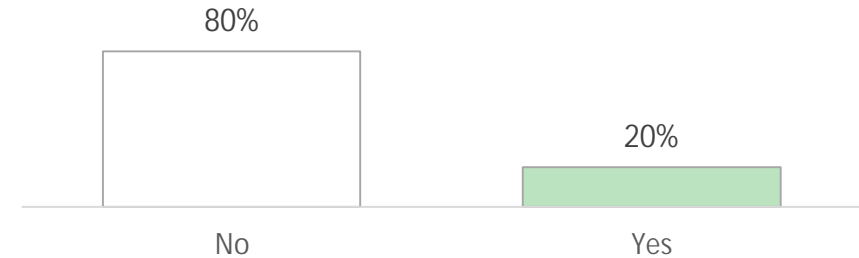
I like to choose destinations that are eco-friendly



I want to make sustainable travel choices



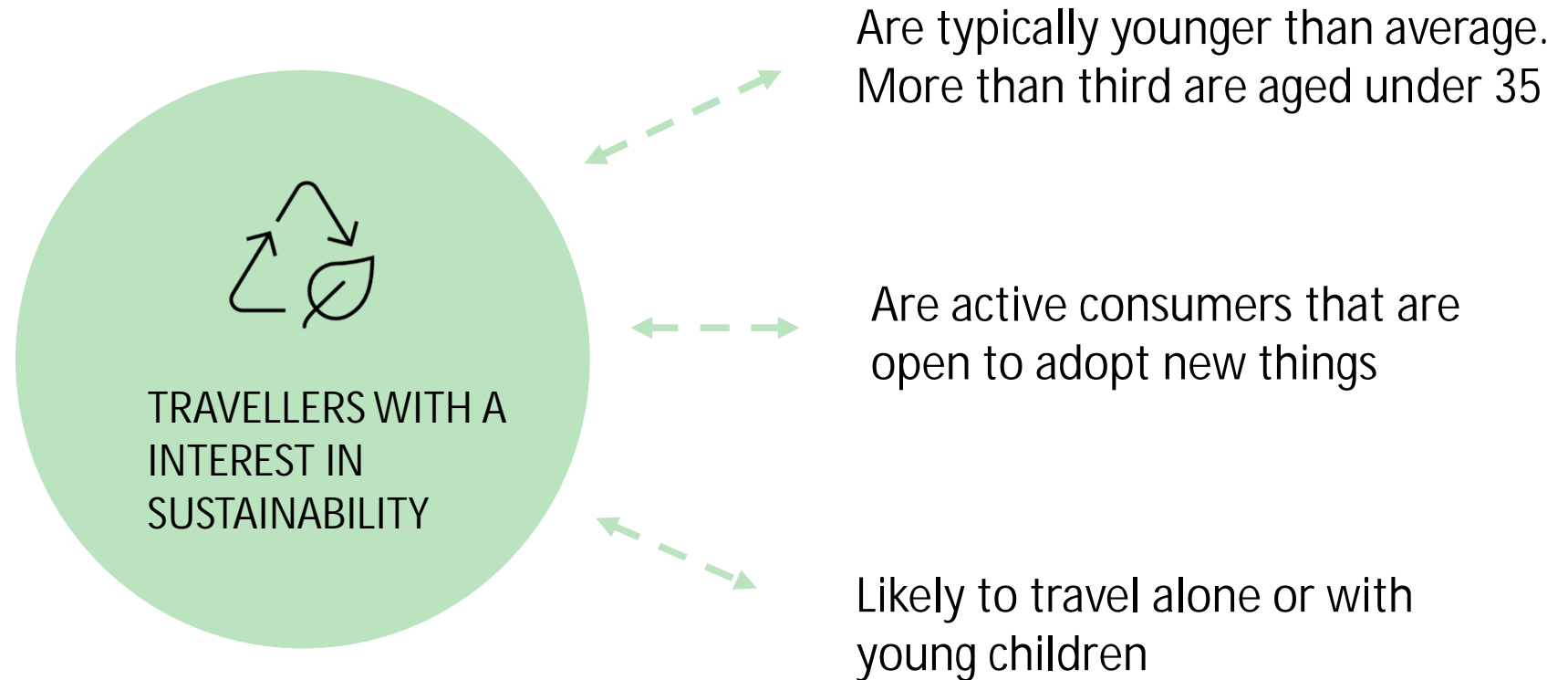
Have you ever compensated your flight emissions?



TRAVELLERS VALUING SUSTAINABILITY

We defined the target group as respondents who want to make sustainable travel choices. They also have used flight emission compensation at least once and like to choose eco-friendly destination at least to some extent. The share of these respondent were about 5% in our sample

What is typical for sustainable travellers?





Sustainable travellers are still a small forerunner target group

Travellers interested in sustainability are active early adopters, but the size of the group is still fairly small. They are typically younger than average and traveling with small children is also highlighted

Key conclusions for the interest areas

There are four global areas of interest

The key result of the research is that we were able to identify four entities of interest. This provides a strong basis for understanding the market and its distribution of interest. This model should be used, for example, in communication and supply planning

Finland's offering should cover all main interest areas for maximal reach

In order to offer the most comprehensive range of attractive offers, Finland should offer something in all four areas. Of course, it is possible to make a choice to focus only on one of the areas, which may be justified, e.g. due to limited resources, but this inevitably reduces the size of the potential market as a whole

Sustainability is important for early adopters, but it is hardly a key destination selection factor

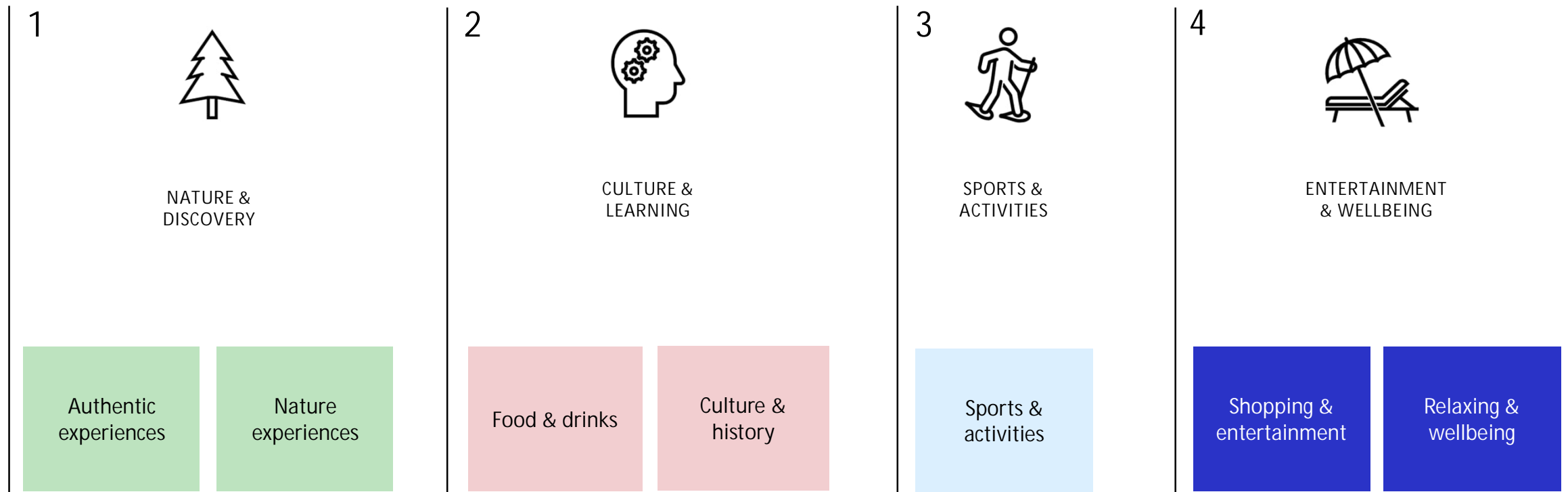
Sustainability is especially important for early adopters and young people, and its importance will probably increase in the future. This means that the destination cannot afford to have a bad reputation in sustainability. However, it seems sustainability topics are not a key selection criteria when choosing a destination. In other words, we cannot trust that a strong sustainability angle alone is enough to arouse strong interest for Finland



WHERE IS FINLAND'S POTENTIAL?

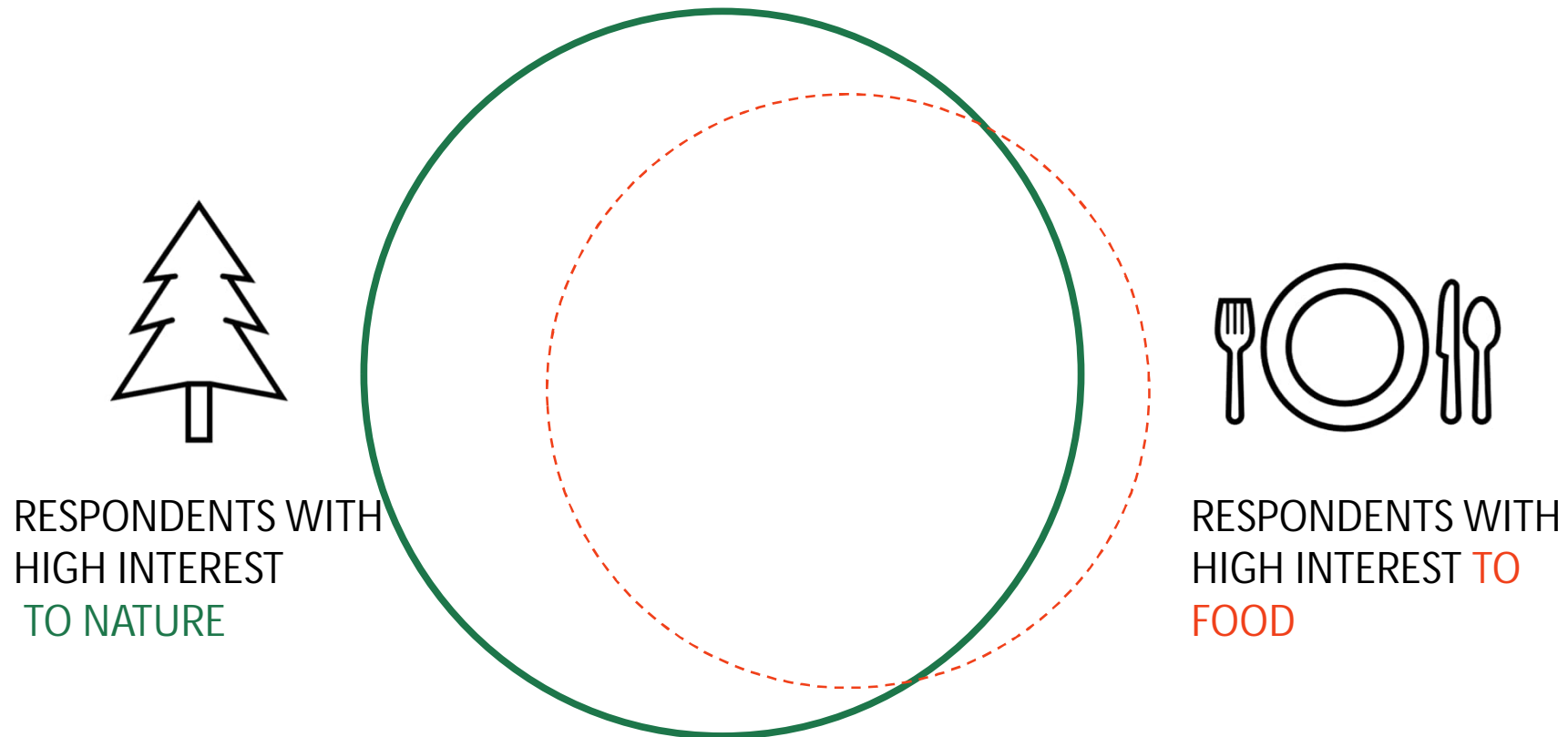
Segmentation and core target groups

Four main interest areas were used as base for segmentation



We measured a total of 46 areas of interest related to vacations and travelling. As a result, we were able to create a model that identifies the most distinctive interest areas in a customer-oriented manner. We used this analysis as a foundation of our traveller segmentation

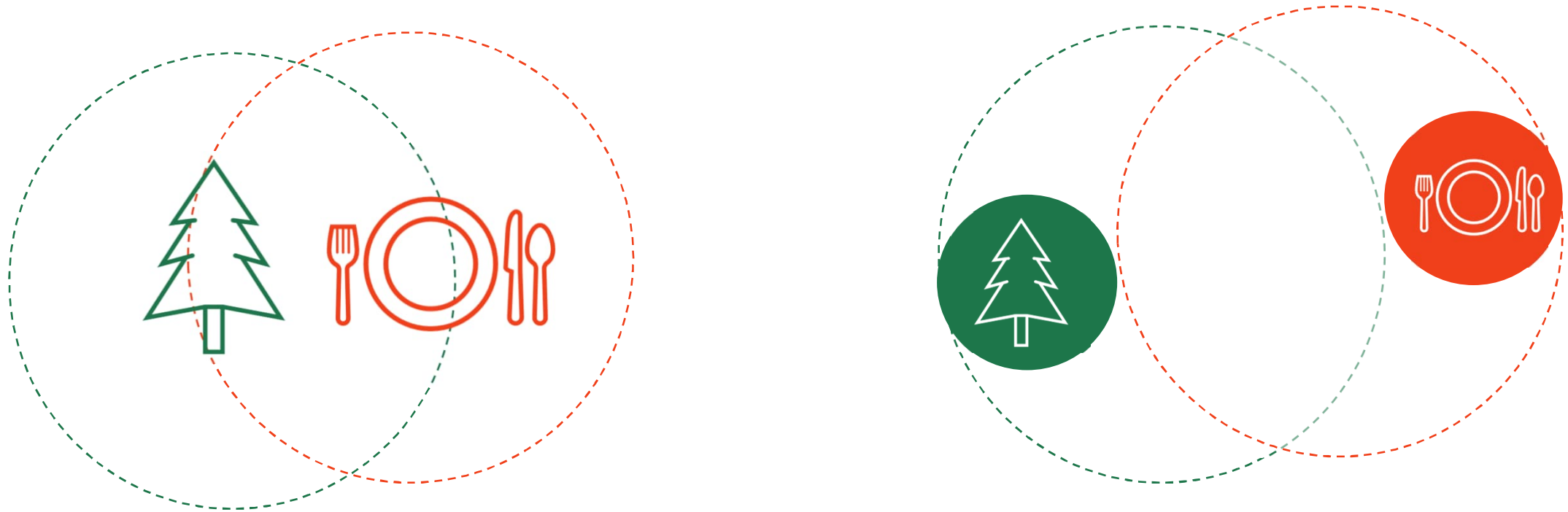
In reality interest areas are highly overlapping



85% of those interested in nature are also interested in food

What did we do?

METHOD & ANALYSIS



In order "sharpen" the segments we defined a core profile for each interest areas. In practise we will decrease the overlap and choose a smaller sub-sample to represent the core of the target group. This produces a sharper profile, but at the same time it is also a caricature. It creates an image that the segments are clearly different, which in reality they often are more overlapping and similar.

We identified 11 segments

NATURE AND DISCOVERY



 Nature lover




 Lifestyle traveller

CULTURE AND LEARNING



 Culture traveller



 Foodie




 Group traveller




 LGBTQ+ traveller

ENTERTAINMENT AND WELLBEING



 City life enthusiast



 Sun & beach lover



 Wellbeing seeker

SPORTS AND ACTIVITIES



 Outdoor explorer



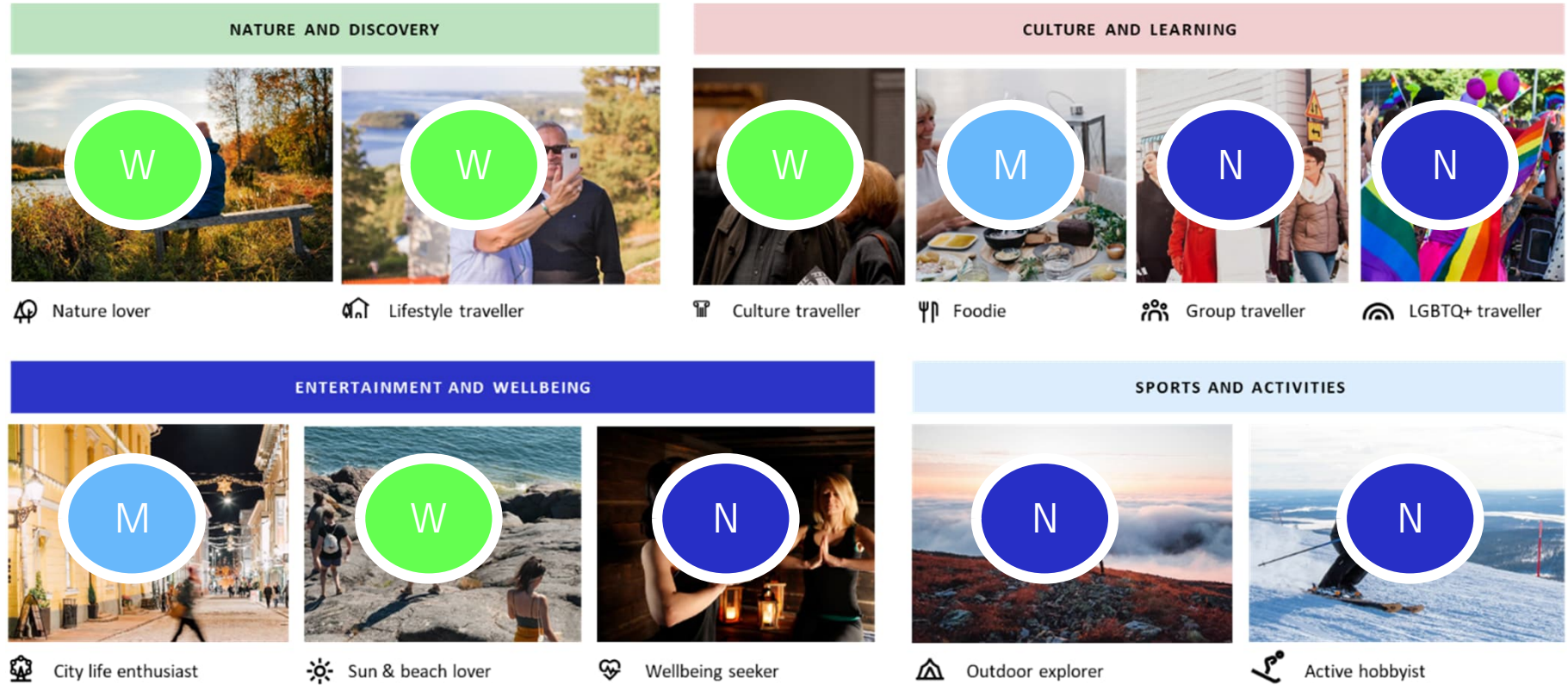
 Active hobbyist

How big the segments are?

WIDE: + 10%

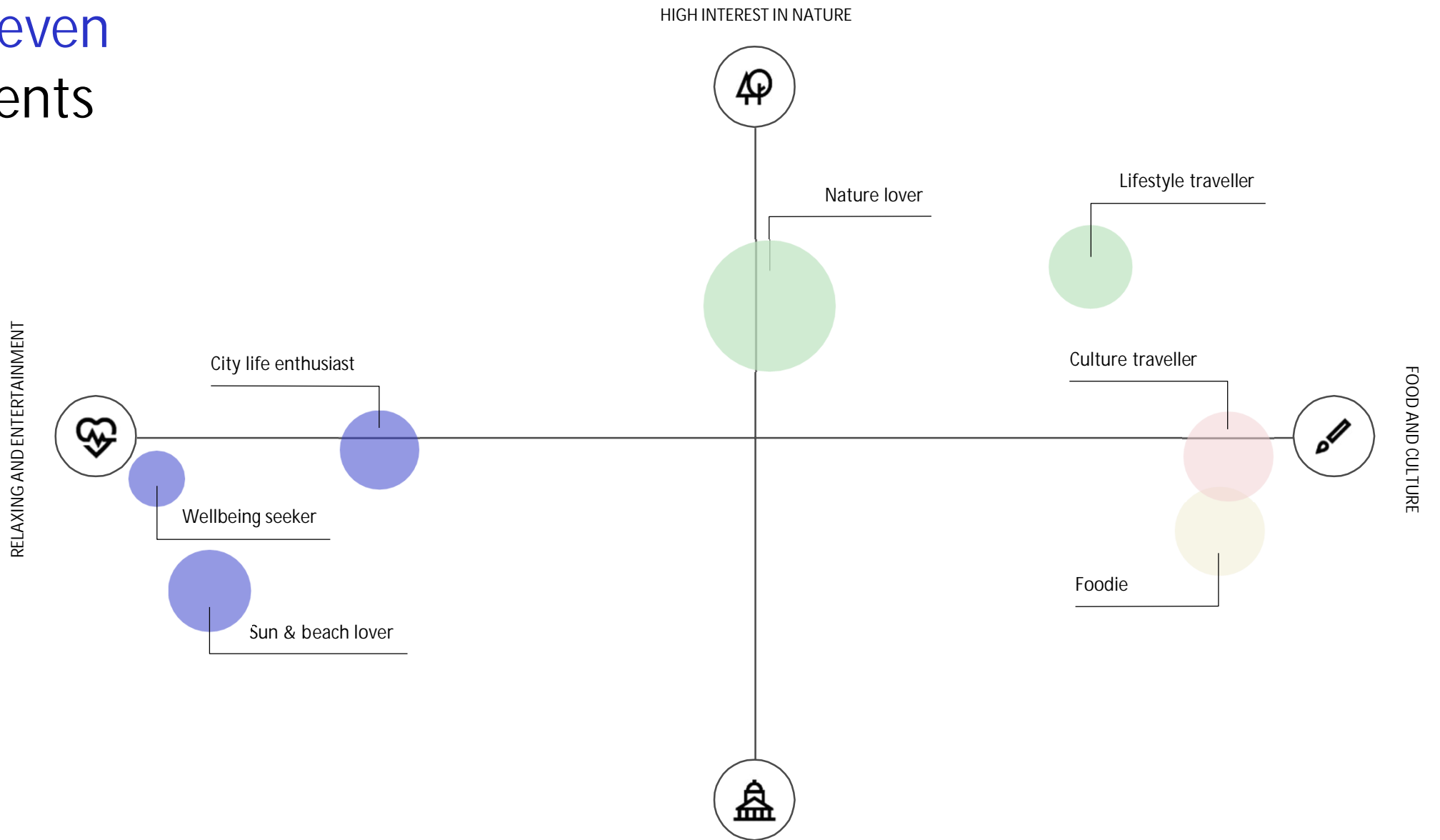
MEDIUM 6 -10%

NARROW: 5% or less

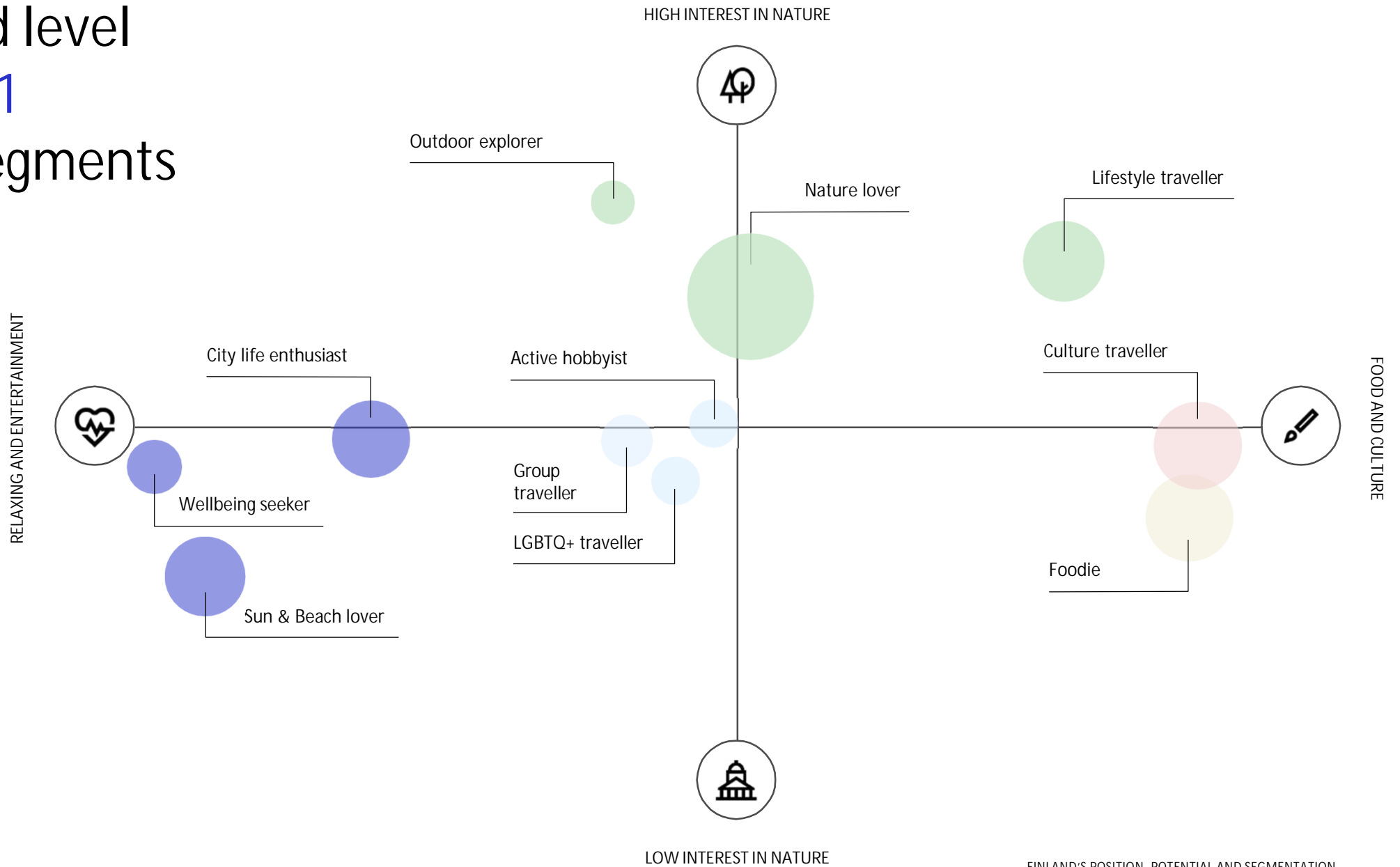


The size of the segment is always partly determined by the method used and the sizes are not strictly limited, however, we can distinguish between large and small segments

There are **seven** main segments



On detailed level
there are **11**
different segments



NATURE AND DISCOVERY



Nature lover

Seeking to see and experience the wonders nature has to offer. Traveller segment that is widely interested in nature and related phenomena.



Lifestyle traveller

A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle.

CULTURE AND LEARNING



Culture traveller

Traveller segment that is eager to learn new and has a wide interest in different culture related topics such as history, design, art and architecture.



Foodie

Traveller segment that is interested in both fine dining and local food culture.



Group traveller

A segment interested in city tours and possibility to interact with other tourists.



LGBTQ+ traveller

A segment interested in experiencing the local LGBTQ+ culture and community.

ENTERTAINMENT AND WELLBEING



City life enthusiast

A segment that is interested in the city's entertainment offerings for example concerts, events, and nightlife. Also a visit to an amusement park or a shopping trip is likely to be interesting



Sun & beach lover

A segment that is interested in the sea, sun and beaches. Values relaxation and rest. Is interested in well-known tourist destinations and familiar destinations.



Wellbeing seeker

A segment interested in relaxation, tranquility and wellbeing. Massage, wellness retreat or a visit in a spa is likely to be interesting.

SPORTS AND ACTIVITIES



Outdoor explorer

A segment that appreciates authentic nature and outdoor activities. Wants to experience an active vacation that can include e.g. cycling or hiking. This segment places great importance on their love for nature and seeks opportunities to connect with and appreciate the natural world.



Active hobbyist

Adventure and excitement driven segment that has an interest to a wide range of sports and hobbies. Has also interest for nightlife



Lifestyle traveller

“Traveling is not just about discovering new places, it's about discovering a new perspective. It's about immersing yourself in the local culture and lifestyle and gaining a deeper understanding of the world around you.”





Lifestyle traveller



Indigenous culture



Local lifestyle in countryside



Interacting with locals

Rural undiscovered destinations



Lifestyle traveller

- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- Interest areas combine topics related to both culture and nature. Touring and roundtrips are interesting. Wants to be active and experience on vacation and not to stay put
- Draws inspiration for travel planning especially from online searches, national or local travel websites, travelling related literature and articles in newspapers and magazines.
- Average travel frequency, most typically travels once per year
- A moderate spender

EVEN GENDER SPLIT

Men 50% / women 50%

OLDER AGE PROFILE

Over 45 years of age 64%

MOST OFTEN FROM SPAIN OR THE NETHERLANDS

Spain 14% / Netherlands 14% / USA 13% / Germany 13% / France 13% / UK 12% / Sweden 11% / Italy 10%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

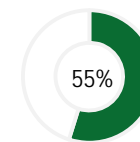


SUSTAINABILITY



DIGITAL FLUENCY

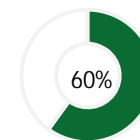
Heavy on online search and less active on newer social media platforms. Little over half share experiences actively (below average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Plans to some degree however not the most thorough planner. Starts making travel plans earlier than on average, typically makes plans for international vacations 3-6 months ahead of time.



MAKES PLANS MORE THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

26% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





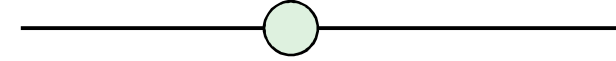
Lifestyle traveller

Traveller profile for Lifestyle traveller

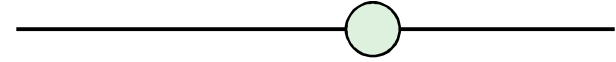
- Plans to some degree however not the most thorough planner. Planning horizon for vacations is longer than on average, typically plans for international vacations 3-6 months ahead of time
- Experienced traveller. Huge desire for experiencing new places and searching for the adventure. Interested in experiencing authentic local lifestyle and nature.
- Sustainability is not a major driver.
- Feels comfortable booking trips without travel agency. Accommodation wise B&B's and short term vacation rentals would be popular for this segment. In addition to Booking.com the use of travel services Airbnb, Expedia and Kayak.com stand out for this segment.

Traveller profile

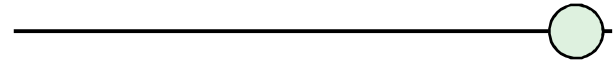
PLANNING



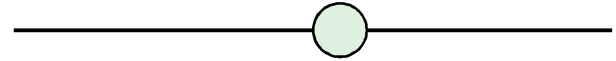
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Lifestyle traveller

Communication & interest in Finland

To target this segment the communication should highlight authentic experiences such as visiting old traditional wooden towns or UNESCO World Heritage sites. Meeting Sami people and exploring their culture is also interesting for this segment.

INTERESTING IN FINLAND

- Visit old wooden traditional towns
- Visit UNESCO world Heritage sites
- Reconnect with nature
- To meet the indigenous Sami people and explore their culture





SUMMARY: Lifestyle traveller's potential for Finland

- Clearly **one of the most potential segments for Finland.**
- It has potential for both in **urban destinations and also in more rural parts of Finland**
- Wide interest to Finland's unique offering related to **nature, authentic culture and lifestyle**
- The opportunity to experience **authentic Finland** is a key attraction factor





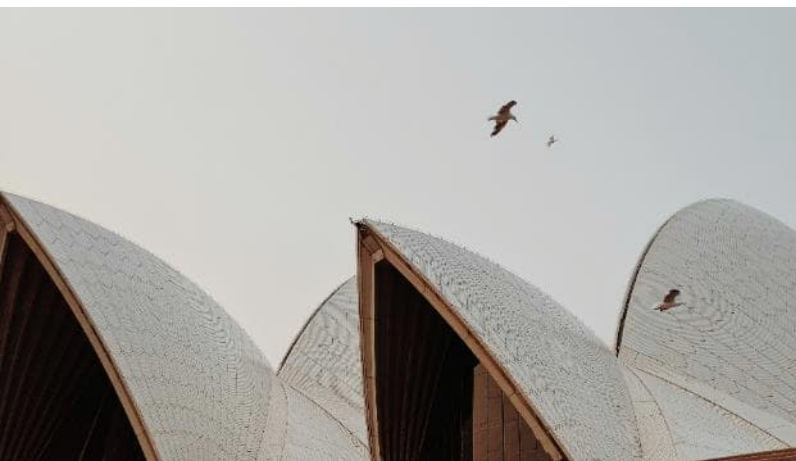
Culture traveller

“Art and culture have the power to transcend boundaries and connect us all. Cultural experiences are an essential part of travelling for me”





Culture traveller



Architecture



**Modern culture
design & modern art**



**Classical culture music
& theatre**

Historic attractions

Religious sites



Culture traveller

- Traveller segment that is eager to learn new and has a wide interest to different culture related topics such as history, design, art and architecture. Cities and urban destinations are interesting.
- Wide interest in all cultural offering and historical sights. Lower interest for sports, beach or nature destinations.
- Profiling sources of inspiration are national or local travel websites, travelling related literature, travelling related TV series or movies and articles in newspapers and magazines.
- Above average travel frequency
- High purchasing power. Unlikely to be very price sensitive and travelling budget is typically above average

EVEN GENDER SPLIT

Men 50% / women 50%

OLDER AGE PROFILE

over 55 years of age 44%

MOST OFTEN FROM SPAIN

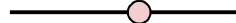
Spain 18% / Italy 15% / USA 14% / Sweden 12% / UK 11% / France 11% / Netherlands 11% / Germany 10%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

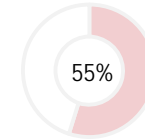


SUSTAINABILITY



DIGITAL FLUENCY

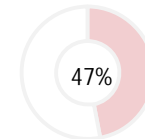
Altogether slightly less active in digital channels. Little over half share experiences actively (below average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

A thorough planner in terms of vacations. Time wise starts making travel plans for international vacations 3-6 months or less than 3 months ahead of time



MAKES PLANS LESS THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

28% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





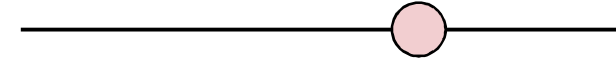
Culture traveller

Traveller profile for Culture traveller

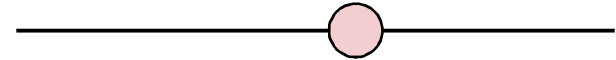
- A thorough plan maker in terms of vacations. Time wise starts making travel plans for international vacations 3-6 months or less than 3 months ahead of time
- A slightly more experienced traveller than average
- Wants to learn and experience new things but is not interested in adventures
- Ecological factors likely to be a minor issue in decision making
- Feels comfortable booking trips without travel agency. Accommodation wise traditional chain-affiliated hotels would be popular. The use of travel services Booking.com and Expedia stand out for this segment.
- This segment likes to travel with friends. Less likely to travel with children.

Traveller profile

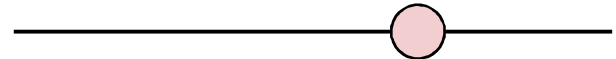
PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Culture traveller

Communication & interest in Finland

In order to appeal to this specific group, the communication should emphasize captivating cultural encounters, such as visits to museums, exploration of design and architecture, and appreciation of performing arts. Additionally, experiencing Helsinki itself holds great appeal for this particular audience.

INTERESTING IN FINLAND

- To experience Finnish architecture and design
- Visit UNESCO world Heritage sites
- To experience Helsinki
- Museums & art
- Performing arts e.g. dance, opera, classical music





SUMMARY: Culture traveller's potential for Finland

- A large segment that is **especially relevant for city destinations**, e.g. Helsinki.
- For example, Finnish architecture and design and Helsinki are interesting, but the **lack of a globally well-known leading cultural attraction is likely to be a limitation** for growth
- The segment **has clearly potential**, but a stronger and better known cultural offering is necessary to reach a higher share of this segment





Foodie

"I love to pamper myself with good food and and explore the local food culture."





Foodie



Culinary experiences

Fine dining

Local food

Distillery / Brewery



Ψ Foodie

- Traveller segment that is interested in both fine dining and local food culture. A visit to a winery or brewery would also be interesting.
- Food is important for all segments however this particular segment travels specifically in pursuit of culinary experiences
- Draws inspiration for travel planning from online search and travelling related literature, travelling related TV series or movies and articles in newspapers or magazines
- Frequent traveler
- Of all segments Foodies use on average the most money on trips

EMPHASIS ON MEN

Men 58% / women 42%

OLDER AGE PROFILE

over 45 years of age 69%

MOST OFTEN FROM SWEDEN OR SPAIN

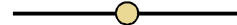
Sweden 16% / Spain 15%
/ USA 13% / UK 13% /
Italy 11% / France 11% /
Germany 11% /
Netherlands 8%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

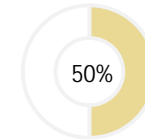


SUSTAINABILITY



DIGITAL FLUENCY

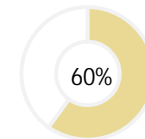
Heavy on online search and altogether slightly less active in digital channels. Half of the segment share experiences actively (below average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Likes to plan vacations quite well. Time wise starts making travel plans for international vacations typically 3-6 months ahead of time



MAKES PLANS OVER 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

31% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





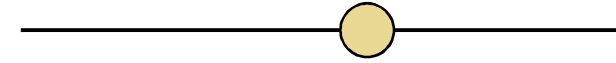
ΨΠ Foodie

Traveller profile for Foodie

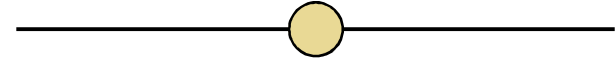
- Likes to plan the vacations quite well. Time wise starts making travel plans for international vacations typically 3-6 months ahead of time
- Average travelling experience
- Not very interested in experiencing new. Foodies are interested in pampering themselves and they value high quality service
- Not very concerned about sustainability factors in terms of travelling
- Accommodation wise traditional chain-affiliated hotels would be popular. Of travel services Booking.com is most popular.
- This segment most often travels with a spouse. They are unlikely to travel with children

Traveller profile

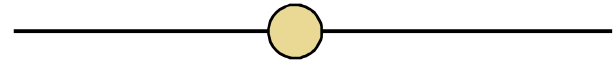
PLANNING



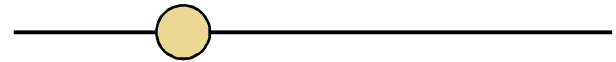
TRAVELLING
EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





ΨP Foodie

Communication & interest in Finland

To captivate this particular audience, the communication should focus on showcasing the richness of Finnish food culture, highlighting fine dining experiences and local specialties. Additionally, offering the opportunity to visit a winery or brewery would add further intrigue to their experience.

INTERESTING IN FINLAND

- Fine dining
- Finnish food culture
- Local specialities
- Breweries, distilleries, wineries





SUMMARY: Foodie's potential for Finland

- Foodie segment's **potential for Finland seems quite limited**
- The Foodie segment describes travellers for whom food is one of their main interests in travelling. In this segment, well-known food countries such as Italy are strong **whereas Finland's appeal is still weak**
- The **role of food should not be underestimated** because it is important for all travellers. However, Finland's growth potential as a destination country for food tourism seems limited at the moment





Nature lover

“There's something magical about seeking out the natural wonders of the world. It's a reminder of how small we are in the grand scheme of things, and how much awe-inspiring beauty there is to discover beyond the boundaries of our daily lives.”





Nature lover



Natural wonders



Nature parks

Wildlife and animals



Snow and arctic nature



Nature lover

- Seeking to see and experience the wonders nature has to offer. Traveller segment that is widely interested in nature and related phenomena. National parks, wildlife and arctic nature are example of topics that arouse interest. Somewhat interested in hiking but not very into other sports.
- Draws inspiration for travel planning especially from online searches and national or local travel websites
- Less frequent traveller than average
- Slightly below average travel budget

EVEN GENDER SPLIT

Men 50% / women 50%

WIDE AGE SPREAD

Under 45 years of age 43% /
over 45 years of age 57%

MOST OFTEN FROM NETHERLANDS OR UK

Netherlands 14% / UK 14% /
France 13% / Germany 13% /
Spain 12% / USA 12% / Italy
12% / Sweden 11%

TRAVELLER PROFILE

PLANNING



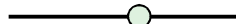
TRAVELLING EXPERIENCE



DESIRE FOR NEW

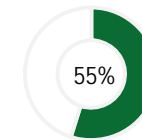


SUSTAINABILITY



DIGITAL FLUENCY

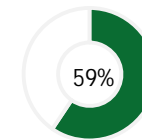
Heavy on online search and less active on newer social media platforms. Little over half share experiences actively (below average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Likes to plan the vacations quite well. Time wise starts making travel plans for international vacations typically 3-6 months or even up to a year ahead of time



MAKES PLANS MORE THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

24% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





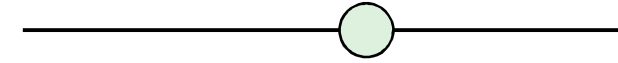
Nature lover

Traveller profile for Nature Lover

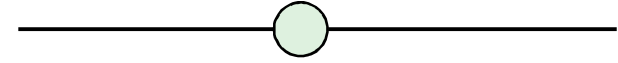
- Makes vacation plans well in advance. Time wise starts making travel plans for international vacations typically 3-6 months or even up to a year ahead of time
- A slightly less experienced traveller than average. Below average travel frequency.
- Nature lovers are keen on experiencing new places however they are not the most adventurous segment
- Slightly above average interest in ecological factors in travelling
- Feels comfortable booking trips without travel agency. Accommodation wise heightened interest in resorts and cottages, short term vacation rentals and camping compared to other segments. Not very experienced in using online booking sites.
- Travels most often with spouse

Traveller profile

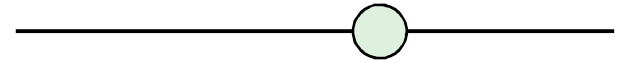
PLANNING



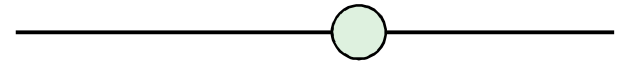
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Nature lover

Communication & interest in Finland

To effectively engage with this specific segment, the communication should focus on highlighting the distinct features and exceptional encounters associated with Finnish nature and natural phenomena like the midnight sun. Additionally, emphasizing experiences involving animals and the opportunity to observe them in their natural habitat would be of great interest to this segment.

INTERESTING IN FINLAND

- Natural phenomenons such as the northern lights, midnight sun and autumn colors in forests
- Reconnecting with nature
- Hiking in a national park
- Snow and arctic nature
- Husky or a reindeer ride
- Experiencing Finnish lakes





SUMMARY: Nature lover's potential for Finland

- The nature lover segment **has potential in many ways**, but Finland still lacks the ability to stand out in a unique way
- Finland's image as nature destination is well suited to this segment, but e.g. **Norway and Iceland are challenging competitors.**
- The target group is typically not a very active one in nature but **more likely to seeks to experience nature related attractions.** The development of this type of “experience” offering could increase the segment's interest in Finland





Outdoor explorer

“Nature is not a place to visit, it is home.

The great outdoors offers endless opportunities to challenge ourselves and to push our limits. Whether it's running, hiking, or biking, these activities allow us to connect with nature.”





Outdoor explorer



Active

Hiking

Biking

Running

Real nature



Outdoor explorer

- A segment that appreciates authentic nature and outdoor activities. Wants to experience an active vacation that can include e.g. cycling or hiking. This segment places great importance on their love for nature and seeks opportunities to connect with and appreciate the natural world.
- Likes to be active whereas cultural experiences are less interesting
- Wants to avoid well-know destinations
- Draws inspiration more from social media stories, influencers, travelling related podcasts and advertisements compared to other segments
- Frequent travelers
- Include also travellers with a high income level. Travelling budget is typically above average however also looks for good deals

MORE OFTEN MEN

Men 60% / women 40%

YOUNGER AGE PROFILE

Under 45 years of age 62%

MOST OFTEN FROM GERMANY OR USA

Germany 17% / USA 16% / Netherlands 14% / Spain 12% / France 12% / Italy 12% / UK 10% / Sweden 8%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY

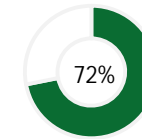


DIGITAL FLUENCY

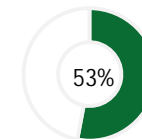
Active in digital channels. Uses also the newer ones, such as Instagram, Tik Tok and Snapchat. Very active in sharing experiences in social media (clearly above average in sharing).

PLANNING STYLE

Often spontaneous and not the most thorough plan maker. Time wise starts making travel plans quite late, over half of this segment plans for international vacations less than 3 months ahead of time



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA



MAKES PLANS LESS THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

28% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





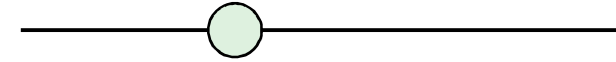
Outdoor explorer

Traveller profile for Outdoor explorer

- Often spontaneous and not the most thorough plan maker. Time wise starts making travel plans quite late, over half of this segment plans for international vacations less than 3 months ahead of time
- The target group is experienced and frequent travellers who are happy to book their trips themselves and often avoid even the most famous tourist destinations
- As a target group, they are not the most adventurous, but are nevertheless open to trying something new
- One of the segments where there are people interested in doing sustainable choices. About third of this segment have compensated their flight emissions at some point
- Accommodation wise heightened interest in resorts and cottages compared to other segments. More likely to use Trivago compared to average
- Likely to travel with young children and sometimes also alone

Traveller profile

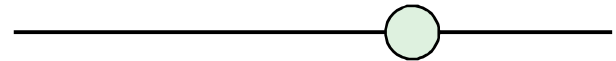
PLANNING



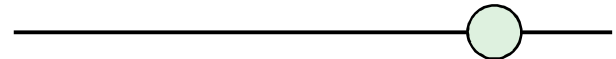
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Outdoor explorer

Communication & interest in Finland

To effectively target this segment, the communication should focus on showcasing the incredible opportunities to engage in active pursuits amidst Finland's stunning natural landscapes. Emphasize activities like hiking, cycling, paddling, and skiing for instance within national parks. Highlight options that can also be enjoyed together with children.

INTERESTING IN FINLAND

- Activities such as hiking, cycling, paddling or skiing in a national park
- Reconnecting with nature
- Experiencing the autumn colours in forests
- Experiencing Finnish lakes





SUMMARY: Outdoor Explorer's potential for Finland

- Clearly **one of the most potential segments for Finland**. The only limitation is that the segment seems to be relatively small making it more difficult to reach
- Wide interest to spend **active vacation close to real nature**. Probably an important segment especially for nature destinations
- Finland's **unique and untouched nature** are strong attractive factors for this segment





Active hobbyist

“Challenging yourself, the sense of adventure and the joy of success are endless sources of inspiration that encourage you to do sports and try new things”





Active hobbyist



Snowmobiling

Water sports

Skiing and boarding

Extreme sports



Active hobbyist

- Adventure and excitement driven segment that has an interest to a wide range of sports and hobbies. Has also interest for nightlife
- Area of interest could range from snowboarding and cross-country skiing to hunting and fishing. Water and winter sports are especially emphasized as areas of interest
- Draws inspiration more from stories from social media, influencers and travelling related podcasts compared to other segments
- Very frequent and experienced travellers despite their fairly young age profile
- Include also travellers with strong purchasing power and willingness to pay for quality

MORE OFTEN MEN

Men 64% / women 34%

YOUNGER AGE PROFILE

Under 45 years of age 76%

MOST OFTEN FROM USA

USA 18% / UK 15% / France 13% / Germany 12% / Spain 11% / Italy 11% / Netherlands 10% / Sweden 9%

TRAVELLER PROFILE

PLANNING



TRAVELLING
EXPERIENCE



DESIRE
FOR NEW



SUSTAINABILITY

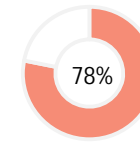


DIGITAL FLUENCY

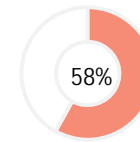
Active in digital channels. Uses also the newer ones, such as Instagram, Tik Tok, Snapchat and Twitch. Extremely active in sharing experiences in social media (clearly above average in sharing).

PLANNING STYLE

Often spontaneous travel decisions and not the most thorough plan maker. Time wise starts making travel plans quite late, over half of this segment plans for international vacations less than 3 months ahead of time



SHARE EXPERIENCES ACTIVELY
IN SOCIAL MEDIA



MAKES PLANS LESS THAN 3
MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

29% more than 1 trip a year
(total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





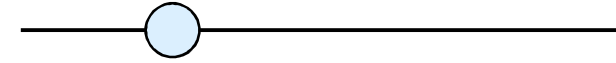
Active hobbyist

Traveller profile for Active Hobbyist

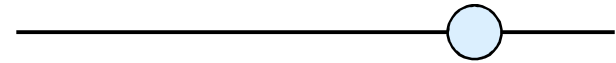
- Often spontaneous travel decisions and not the most thorough plan maker. Time wise starts making travel plans quite late, over half of this segment plans for international vacations less than 3 months ahead of time
- Very frequent and experienced travellers. Booking trips self or using online travel agency or travel agency are both viable options for this segment.
- Early adopters who yearn for new and exciting travel destinations, adventures and once in a lifetime experiences
- Active hobbyists are most interested in doing sustainable travel choices of all segments. More than third of this segment have compensated their flight emissions at some point
- Accommodation wise heightened interest in boutique hotels, hostels and timeshares. Uses widely different travel services and for example Trivago and Skyscanner are often used
- Travels often with young children and sometimes also alone

Traveller profile

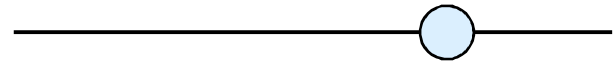
PLANNING



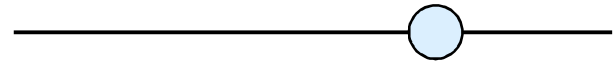
TRAVELLING
EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Active hobbyist

Communication & interest in Finland

To effectively target this segment, the communication should highlight how Finland can offer unique opportunities for thrilling sports adventures and active once in a lifetime experiences. Emphasize also options that are suitable for families, enabling both children and adults to enjoy them together.

INTERESTING IN
FINLAND

- Active winter sports and experiences such as skiing, snowmobiling and husky or a reindeer ride
- Exciting water sports such as white water rafting
- Authentic Finnish sauna
- Spending night in a glass igloo





SUMMARY: Active Hobbyist's potential for Finland

- Despite its relatively small size, **one important segment for Finland**. The high travelling frequency and strong purchasing power make it more commercially significant for its size
- **Interest for sports and activities** make it an important target group for e.g. Nordic skiing centers. However, also summer sports are interesting to this segment
- Finland's ability to offer **exciting activities and interesting sports experiences** is a clearly attractive factor. Also unique experiences e.g. a real Finnish sauna is interesting





City life enthusiast

“Traveling is not just about exploring new places, it's about breaking free from the routine and immersing yourself in the vibrant energy of a city that never sleeps.”





City life enthusiast



Shopping

**Amusement
parks & zoos**

Night life

**Sports and
music events**



City life enthusiast

- A segment that is interested in the city's entertainment offerings for example concerts, events, and nightlife. Also a visit to an amusement park or a shopping trip is likely be interesting
- Draws inspiration from experiences from family and friends, stories from social media, travel agencies, advertisements and influencers
- Below average travel frequency
- Budget conscious, looks actively for the best deals and affordable options. Budget is likely to be under the average.

EVEN GENDER SPLIT

Men 50% / Women 49% / Other 1%

YOUNGER AGE PROFILE

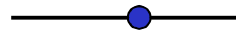
Under 45 years of age 66%

MOST OFTEN FROM USA OR SPAIN

USA 18% / Spain 15% / France 12% / Germany 12% / UK 12% / Italy 10% / Netherlands 10% / Sweden 10%

TRAVELLER PROFILE

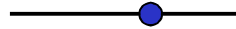
PLANNING



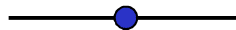
TRAVELLING EXPERIENCE



DESIRE FOR NEW

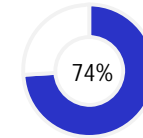


SUSTAINABILITY



DIGITAL FLUENCY

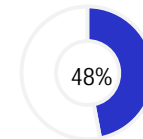
Broad and active user of different digital media channels from Facebook and youtube to Tik Tok and Snapchat. Very active in sharing experiences in social media (clearly above average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

City life enthusiasts tend to make careful plans for their travels. In terms of timing, this segment consists of both travelers who begin planning well in advance and those who make more spontaneous and last-minute travel plans.



MAKES PLANS LESS THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

24% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





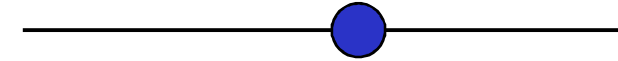
City life enthusiast

Traveller profile for City life enthusiasts

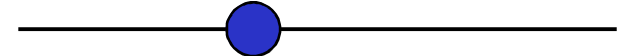
- City life enthusiasts tend to make careful plans for their travels. In terms of timing, this segment consists of both travelers who begin planning well in advance and those who make more spontaneous and last-minute travel plans.
- A slightly less experienced traveller than average
- Has a clear interest in new things and likes new destinations. Is also interested in adventures to some extent.
- Neutral attitude towards sustainability. Ecological factors likely to be a minor issue in decision making
- Accommodation wise hotels are popular for this segment but also heightened interest in hostels compared to other segments. Of travel services uses Trivago, Hotels.com, more than other segments
- Segment also includes families with young children

Traveller profile

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





City life enthusiasts

Communication & interest in Finland

To effectively reach out to this specific group, the messaging should emphasize the various entertainment options available in the city, such as concerts, events, and vibrant nightlife. Additionally, it would be appealing to mention the possibility of enjoying a trip to an amusement park or indulging in a shopping spree.

INTERESTING IN FINLAND

- Exploring cities and their shopping opportunities and nightlife
- Concerts and music festivals such as the Flow Festival
- Events
- Amusement parks or zoos





SUMMARY: City life enthusiasts' potential for Finland

- **The segment's potential for Finland is moderate on overall level**, but could be a significant target group for a single service provider
- For this young entertainment-oriented and urban target group **Finland does not appear to be a very interesting destination as a country**
- However, **the target group is probably important for individual events** such as rock concerts or large sports events in major cities. Probably a significant target group for bars and nightclubs as well





Wellbeing seeker

“In a world that's constantly on the move, it's important to take a step back, breathe, and focus on your own wellbeing. Whether it's a massage, a visit to a wellness retreat, or a day at the spa, these experiences offer a chance to recharge and rejuvenate.”





Wellbeing seeker



Visiting a spa



Wellbeing treatments

Wellness retreat



Sunbathing

Relaxation



Wellbeing seeker

- A segment interested in relaxation, tranquility and well-being. Massage, wellness retreat or a visit in a spa is likely to be interesting.
- Draws inspiration from experiences from family and friends and travel agencies. Relies also on reviews when choosing a travel destination
- Below average travel frequency
- Budget conscious, looks actively for the best deals and affordable options. Budget is likely to be under the average.

MORE OFTEN WOMEN

Women 63% / Men 37%

MOST OFTEN 35-54 YRS

35-54 years of age 47%

MOST OFTEN SPAIN, ITALY OR GERMANY

Spain 17% / Italy 17% / Germany 16% / USA 11% / Netherlands 11% / Sweden 11% / UK 10% / France 7%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

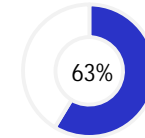


SUSTAINABILITY



DIGITAL FLUENCY

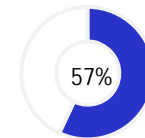
Emphasis on using online search and Facebook. Less active on newer social media channels. Relatively active in sharing experiences in social media (slightly above average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Wellbeing seekers plan their travels quite carefully. Time wise starts making travel plans for international vacations most typically 3-6 months ahead of time



MAKES PLANS MORE THAN 3 MONTHS AHEAD OF TIME

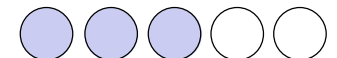
TRAVEL FREQUENCY

22% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





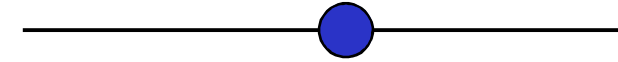
Wellbeing seeker

Traveller profile for Wellbeing Seeker

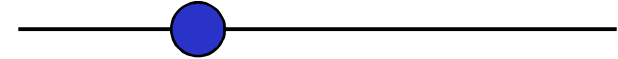
- Wellbeing seekers plan their travels quite carefully. Time wise starts making travel plans for international vacations most typically 3-6 months ahead of time
- Less experienced travellers who value safety
- Not interested in new destinations and adventures, seeks for a safe choice and a relaxing vacation
- Neutral attitude towards sustainability. Ecological factors likely to be a minor issue in decision making
- Accommodation wise hotels are popular for this segment. Of travel services Booking.com is most popular.
- Travels often with spouse or friends

Traveller profile

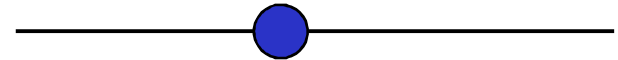
PLANNING



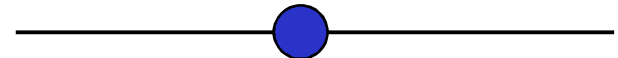
TRAVELLING
EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





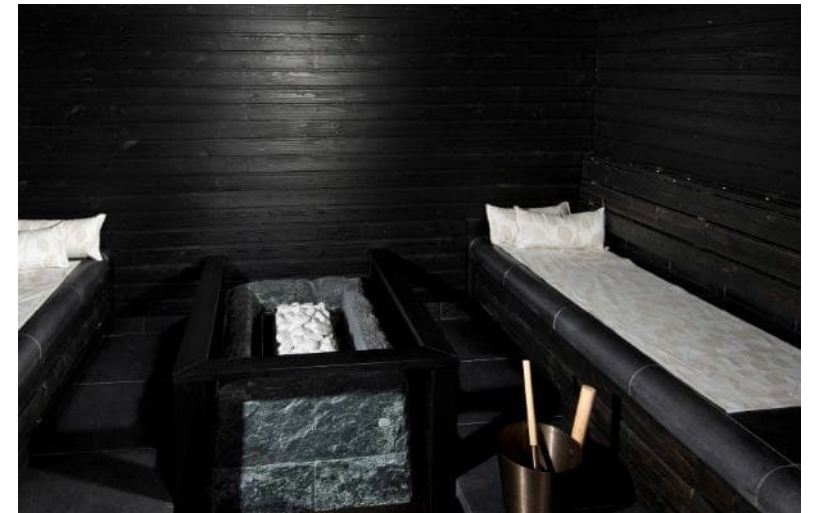
Wellbeing seeker

Communication & interest in Finland

To effectively engage with this target audience, the messaging should highlight opportunities for relaxation, serenity, and overall wellbeing. The inclusion of massages, wellness retreats, or spa visits is likely to pique their interest.

INTERESTING IN FINLAND

- Wellness retreats & spas
- To experience an authentic Finnish Sauna
- Wellness treatments





SUMMARY: Wellbeing seeker's potential for Finland

- The **growth potential of well-being seekers seems limited**, even though Finland has potentially interesting offering
- Segment has also **clear interest to sun and warm destinations** which could drop interest for Finland. A relatively low average budget and limited travelling experience may also be a barrier to choose Finland
- In communication **Sauna, clean nature and air** may be attractive messages for this target group





Group traveller

“Every city is a world in itself, full of life, culture, and endless possibilities for adventure. The beauty of city tours is that they allow us to connect with other travelers from all over the world, and to discover the unique character and charm of each new destination.”





Group traveller



**Guided city
tours**



**Interacting with other
tourists and locals**



**Historic
attractions**

**Theme and amusement
parks**



Group Traveller

- A segment interested in city tours and the possibility to interact with other tourists. Is likely to be interested in visiting big cities. Sightseeing, culture and shopping are likely areas of interest
- Draws inspiration more from experiences from family and friends, national or local travel websites, travel agencies, advertisements, influencers and travelling related podcasts compared to other segments
- Average travel frequency
- Budget conscious, looks actively for the best deals and affordable options

EVEN GENDER SPLIT

Women 51% / Men 49%

MOST OFTEN 35-44 YRS

35-44 year olds 24%. Over 75 year olds are also emphasized in this segment (8%)

MOST OFTEN FROM ITALY, USA OR SPAIN

Italy 19% / USA 17% / Spain 16% / France 13% / UK 11% / Germany 9% / Netherlands 8% / Sweden 7%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

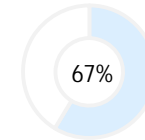


SUSTAINABILITY



DIGITAL FLUENCY

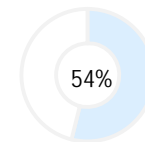
Emphasis on using Facebook, Instagram and Tik Tok. Relatively active in sharing experiences in social media (above average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Group travellers plan their travels quite carefully. In terms of timing, this segment consists of both travelers who begin planning well in advance and those who make more spontaneous and last-minute travel plans.



MAKES PLANS MORE THAN 3 MONTHS AHEAD OF TIME

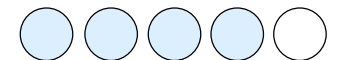
TRAVEL FREQUENCY

26% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





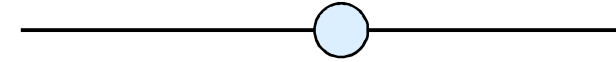
Group Traveller

Traveller profile for Group traveller

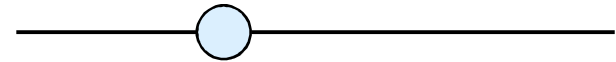
- Group travellers plan their travels quite carefully. In terms of timing, this segment consists of both travelers who begin planning well in advance and those who make more spontaneous and last-minute travel plans.
- Less experienced travellers who like to use travel agencies
- As a target group likes to experience new places and even be adventurous however in a planned manner and preferably with other people
- One of the segments where there are people interested in doing sustainable choices. About quarter of this segment have compensated their flight emissions at some point
- Accommodation wise chain-affiliated hotels are popular for this segment
- Travel most often with spouse

Traveller profile

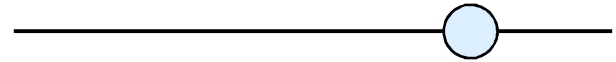
PLANNING



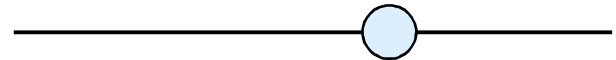
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





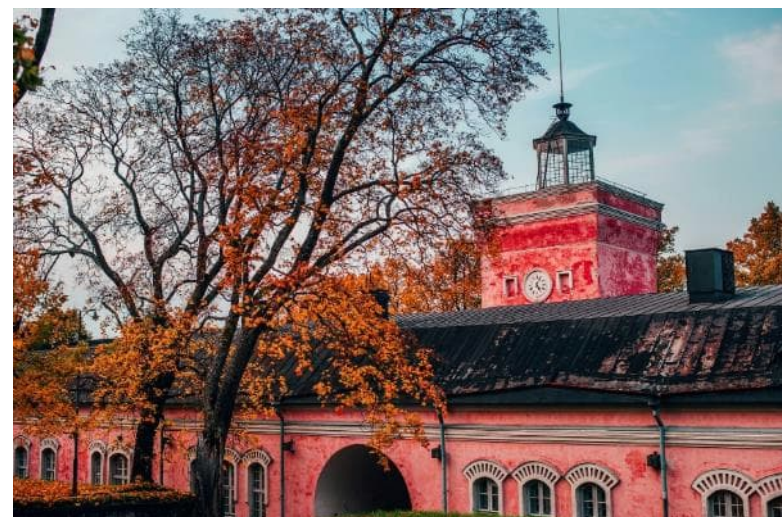
Group Traveller

Communication & interest in Finland

To effectively target this particular segment, the communication should highlight captivating urban attractions and curated sightseeing opportunities. Additionally, showcasing the opportunity to explore Finland's renowned UNESCO World Heritage Sites would certainly pique their interest.

INTERESTING IN FINLAND

- Guided City tours
- Finland's UNESCO World Heritage Sites
- Popular city attractions





SUMMARY: Group Traveller's potential for Finland

- Group traveller is **probably a fairly important segment** for Finland despite its relatively small size
- **Probably an important target group for Helsinki region.** Price consciousness and lack of experience could set limits on the segment's potential
- In communication **interesting well-known sights and good services aimed at tourists,** such as sightseeing tours, are important





LGBTQ+ traveller

“Being a part of the LGBTQ+ community all around the world means embracing diversity, celebrating individuality, and creating a space where everyone is welcome and valued for who they are. It's about standing up for love, equality, and human rights, and being proud of who you are and who you love.”





LGBTQ+ traveller



Local LGBTQ+ culture

Nightlife

Interacting with locals and other tourists



LGBTQ+ traveller

- A segment interested in experiencing the local LGBTQ+ culture and community
- A very social segment, interested in interacting with locals and other travellers. Nightlife is also interesting for this segment. Design, sports or spa can also be possible areas of interest
- Draws inspiration more from social media stories, influencers and travelling related podcasts compared to other segments
- Above average travel frequency
- Above average yearly travel budget however a moderate spender

MORE OFTEN MEN

Men 57% / Women 43%

YOUNGER AGE PROFILE

Under 45 years of age 63%

MOST OFTEN FROM FRANCE, USA, SPAIN OR GERMANY

France 15% / USA 14% / Spain 14% / Germany 14% / UK 13% / Italy 12% / Netherlands 11% / Sweden 8%

TRAVELLER PROFILE

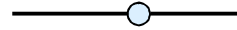
PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY

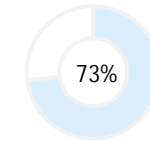


DIGITAL FLUENCY

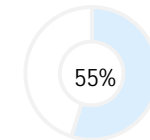
Broad and active user of different digital media channels. Very active in sharing experiences in social media (clearly above average in sharing).

PLANNING STYLE

Often spontaneous and not the most thorough plan maker. Starts making travel plans relatively late, over half of the segment plans for international vacations less than 3 months ahead of time



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA



MAKES PLANS LESS THAN 3 MONTHS AHEAD OF TIME

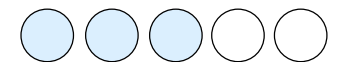
TRAVEL FREQUENCY

28% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





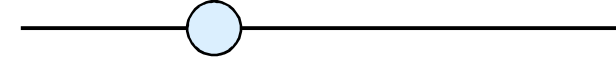
LGBTQ+ traveller

Traveller profile for LGBTQ+ traveller

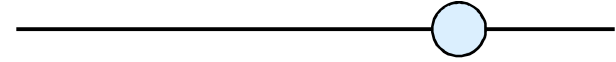
- Often spontaneous and not the most thorough plan maker. Starts making travel plans relatively late, over half of the segment plans for international vacations less than 3 months ahead of time
- Experienced travellers
- Adventurous early adopters who like to avoid the most well known tourist destinations.
- One of the segments with people interested in doing sustainable choices. Over third of this segment have compensated their flight emissions at some point
- Heightened interest in hostels compared to other segments. Sites Trivago, Skyscanner, Trip.com and Viator are popular compared to other segments.

Traveller profile

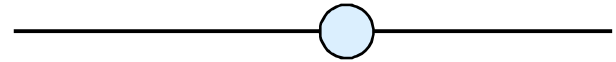
PLANNING



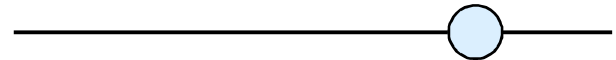
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





LGBTQ+ traveller

Communication & interest in Finland

To effectively target this particular segment, your communication should emphasize the vibrant local LGBTQ+ culture and community. Highlight also the interesting nightlife options available in the destination such as LGBTQ+ bars, clubs, and venues that offer an inclusive environment.

The services and opportunities related to exercise and sports are also of interest

INTERESTING IN FINLAND

- LGBTQ+ community and events
- Interesting nightlife options
- Sports & fitness



📡 SUMMARY: LGBTQ+ Traveller's potential for Finland

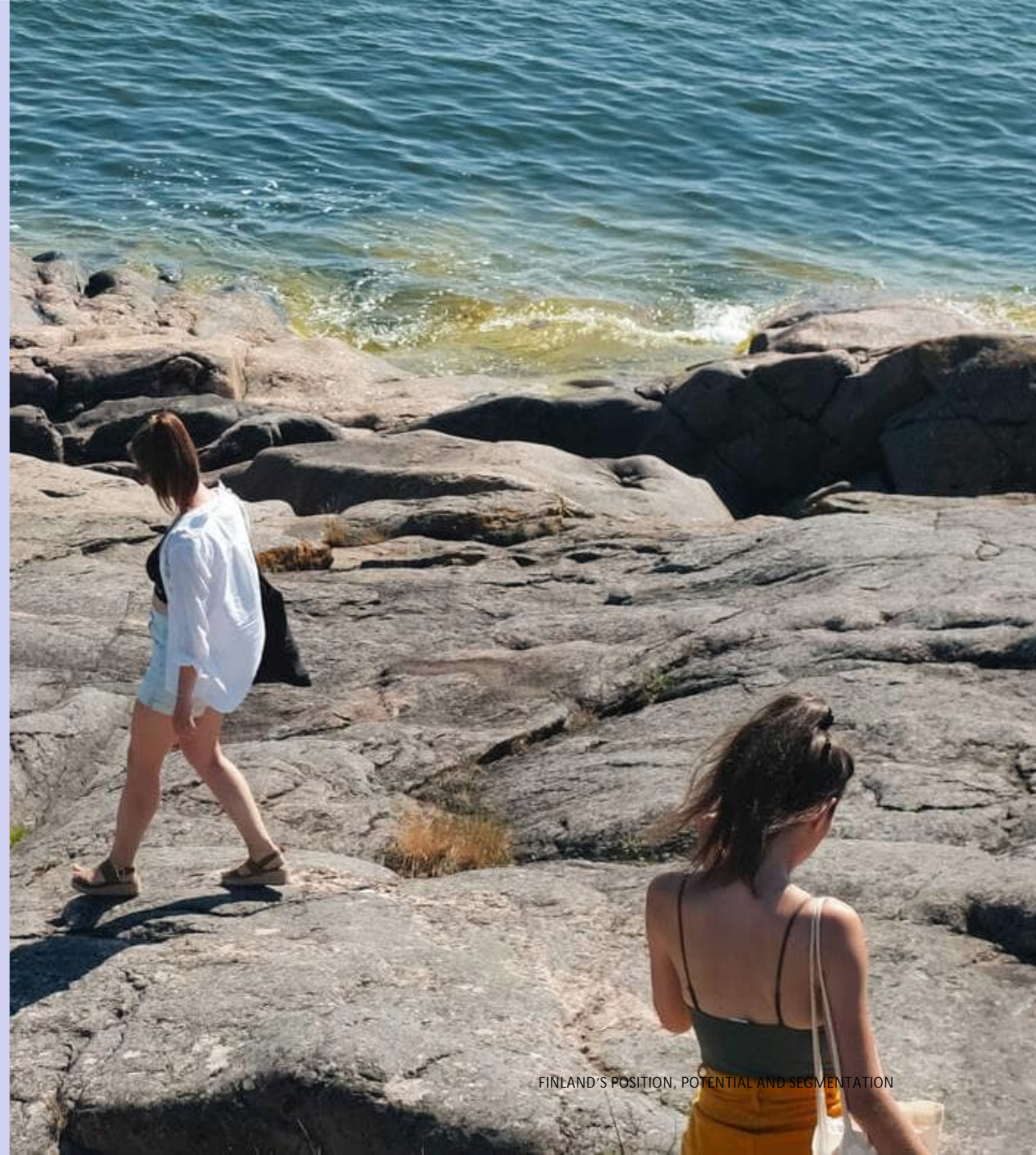
- The **potential of the LGBTQ+ traveller's segment is limited** due to its small size
- Despite its small size, it can be an interesting segment e.g. restaurants. **Strong purchasing power and open-mindedness** makes it an interesting segment for new services
- In communication **open-mindedness and sustainability related** topics are likely to be important in addition to LGBTQ+ culture related topics





Sun and beach lover

“The easiest way to relax is to soak up the sun on a beach. Sometimes the best way to recharge is to simply let go and enjoy the beauty of the familiar, well-known destinations that we love.”





Sun and beach lover



Sunbathing

**Experiencing the
sea**

Swimming



Sun & beach lover

- A segment that is interested in the sea, sun and beaches. Values relaxation and rest. Is interested in well-known tourist destinations and familiar destinations.
- Doesn't want to be active and doesn't look for cultural experiences
- Draws inspiration more from online booking platforms compared to other segments
- Average travel frequency, most typically travels once per year
- A moderate spender. Part of the segment has a lower than average budget for travel

SLIGHT MAJORITY OF WOMEN

Women 55% / Men 45%

OFTEN MIDDLE AGED OR A BIT OLDER

over 45 years of age 57%

MOST OFTEN FROM GERMANY

Germany 22% / Netherlands 15% / Sweden 15% / France 12% / Italy 11% / UK 10% / USA 9% / Spain 6%

TRAVELLER PROFILE

PLANNING



TRAVELLING EXPERIENCE



DESIRE FOR NEW

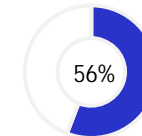


SUSTAINABILITY



DIGITAL FLUENCY

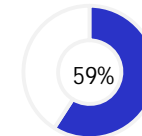
Heavy on online search and less active on newer social media platforms. Little over half share experiences actively (below average in sharing).



SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

PLANNING STYLE

Likes to plan vacations quite well. Time wise starts making travel plans for international vacations typically 3-6 months ahead of time



MAKES PLANS MORE THAN 3 MONTHS AHEAD OF TIME

TRAVEL FREQUENCY

26% more than 1 trip a year (total sample avg 26%)

VALUE



POTENTIAL FOR FINLAND





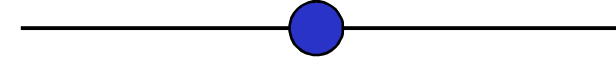
Sun & beach lover

Traveller profile for Sun & beach lover

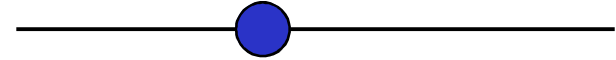
- Likes to plan vacations quite well. Time wise starts making travel plans for international vacations typically 3-6 months ahead of time
- Not a particularly experienced traveller segment. Likes to use online travel agencies more often than others to organize a trip and also package trips are interesting
- Is not really interested in seeking new experiences. Likes to trust familiar places and values safety
- One of the segments least interested in sustainable travelling
- Heightened interest in resorts compared to other segments.
- Likely to travel with young children, teenagers and relatives

Traveller profile

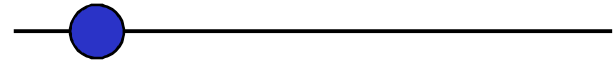
PLANNING



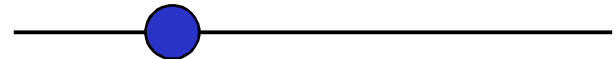
TRAVELLING EXPERIENCE



DESIRE FOR NEW



SUSTAINABILITY





Sun & beach lover

Communication & interest in Finland

To effectively target this particular segment, your communication should emphasize the enticing possibilities for relaxation by the sea or a lake, under the sun, and on picturesque beaches. Highlight the values of tranquility, rejuvenation, and rest. Family friendly options and packages are interesting for this segment.

INTERESTING IN
FINLAND

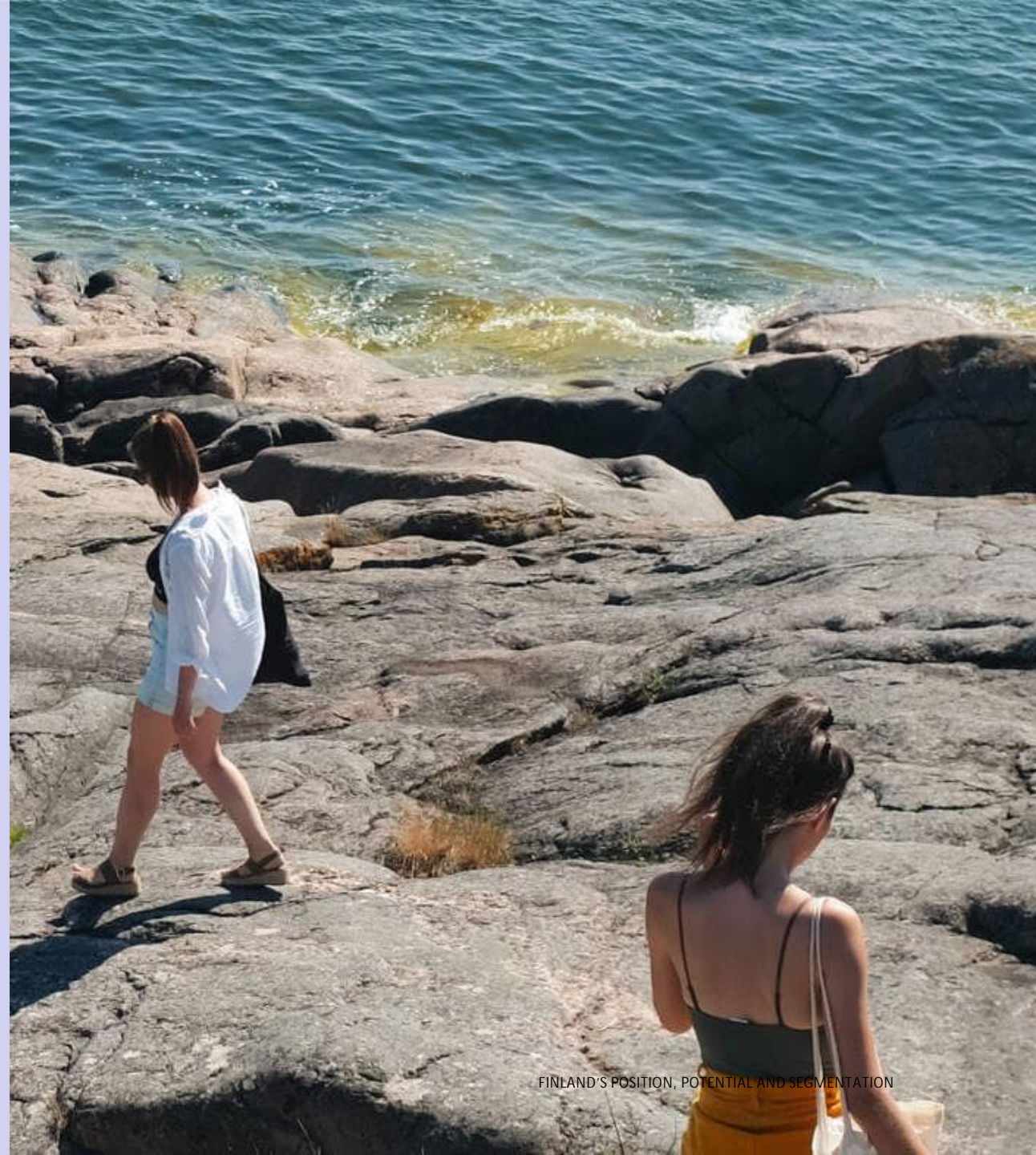
- Experiencing the lakes
- Experiencing the sea





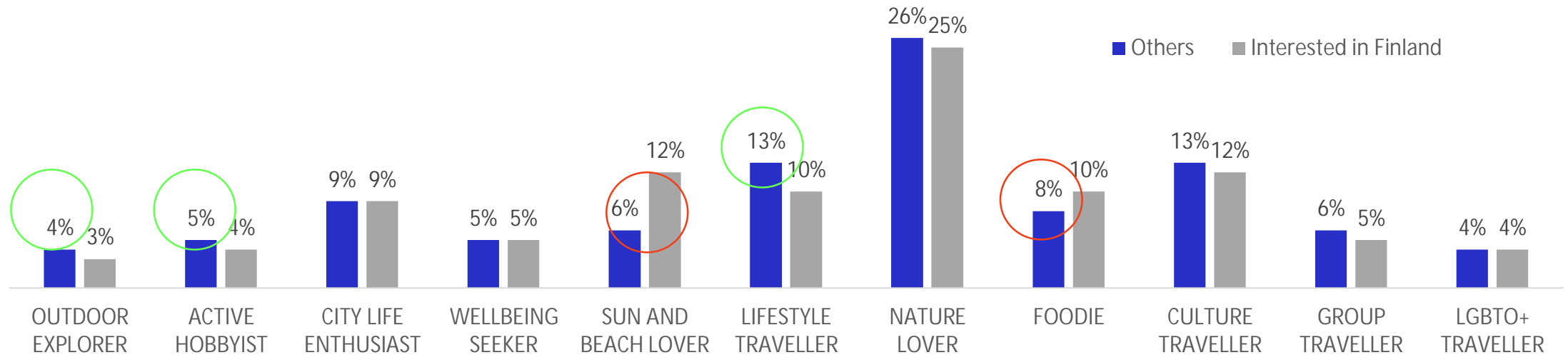
SUMMARY: Sun and beach Lover's potential for Finland

- One of the clearly **most difficult segments for Finland**
- **Strong interest in well-known beach destinations** makes Finland a less interesting destination
- **Finnish lakes, archipelago** and the offering for families with children could potentially arouse the interest



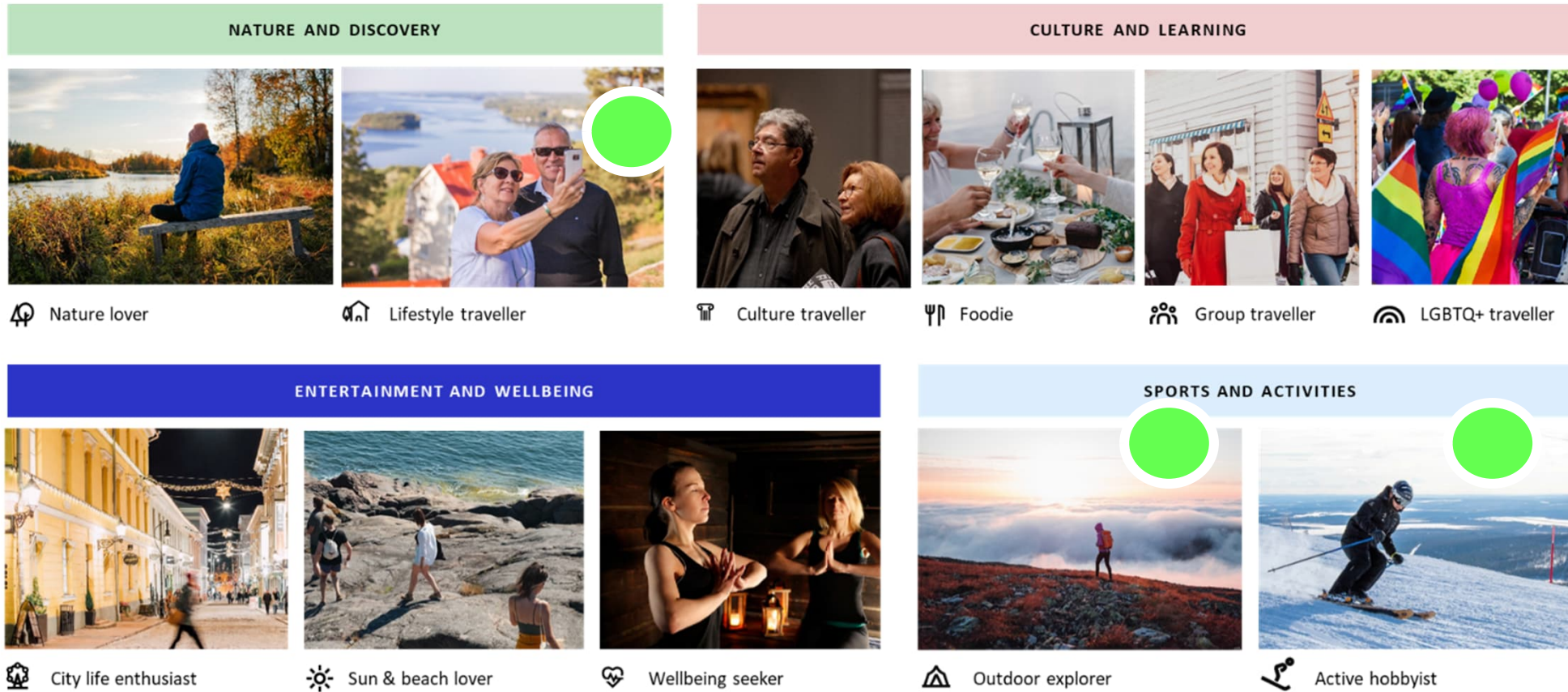
Segment size among those interested in Finland

Segments shares among those interested in Finland



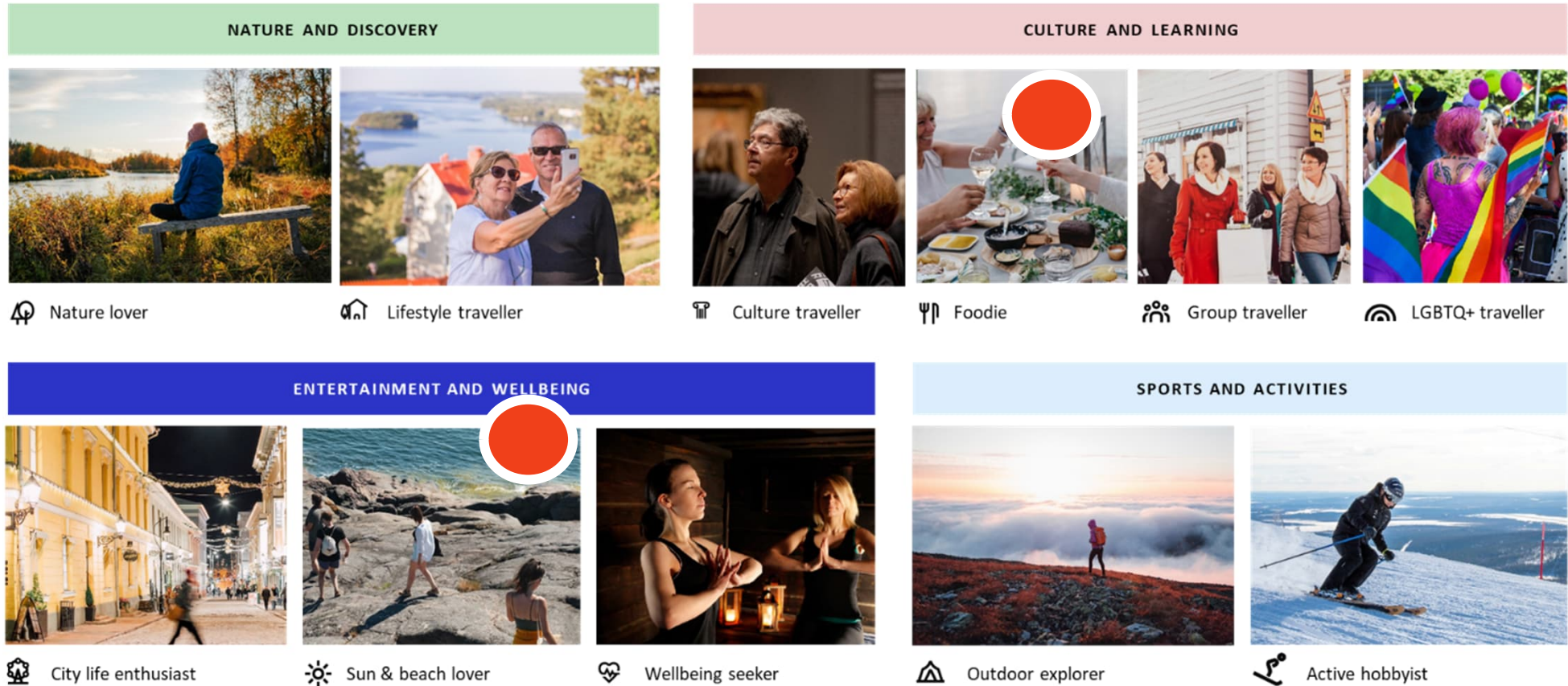
The analysis shows that among those interested in Finland, the Outdoor Explorer, Active Hobbyist and Lifestyle Traveler segments are highlighted. On the other hand, Sun & Beach and Foodie are underrepresented. But it is clear that the interest in Finland is not only focused on one segment

What segments match best to Finland's offering?



At the segment level, interest in Finland is slightly higher in three segments. The results suggest that Finland has offering that resonates best with these segments



What segments are more difficult for Finland?






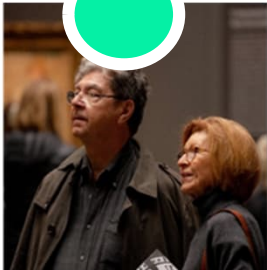
As expected the sun and beach lover segment is clearly the weakest segment for Finland. Also Foodie segments interest level is a bit below average

There is potential for several segments


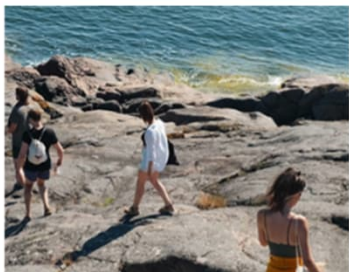

NATURE AND DISCOVERY





CULTURE AND LEARNING



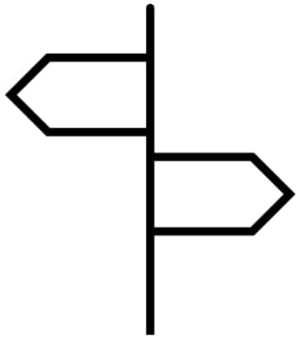
ENTERTAINMENT AND WELLBEING



SPORTS AND ACTIVITIES



Finland has opportunities in several segments, but growth requires consistent effort both in service development and communication.



Finland's offering is best suited for three segments,
but **there is potential in several segments**

Finland has potential in several segments and marketing and service offering should be targeted at several different target groups for maximal reach

Key conclusions for the Finland's potential

There is potential in several different segments

Although the research identifies three segments in which Finland is inherently strong, it is clear that there is potential in several segments and Finland currently reaches all target groups at least to some extent

An individual service provider can succeed in any segment, even if some target groups are more difficult than others

By developing a competitive service offering and effective marketing, it is possible for an individual business to succeed in any segment. However, it is clear that, for example, in the Sun and Beach or Foodie segments, the starting situation is more difficult than in other segments

Growth takes place through the strengthening of awareness and relevant offering for each segment

Growing the segment requires both awareness and the development of a truly relevant and interesting offer. The easiest way to build this is for those segments where Finland's attraction is already relatively strong

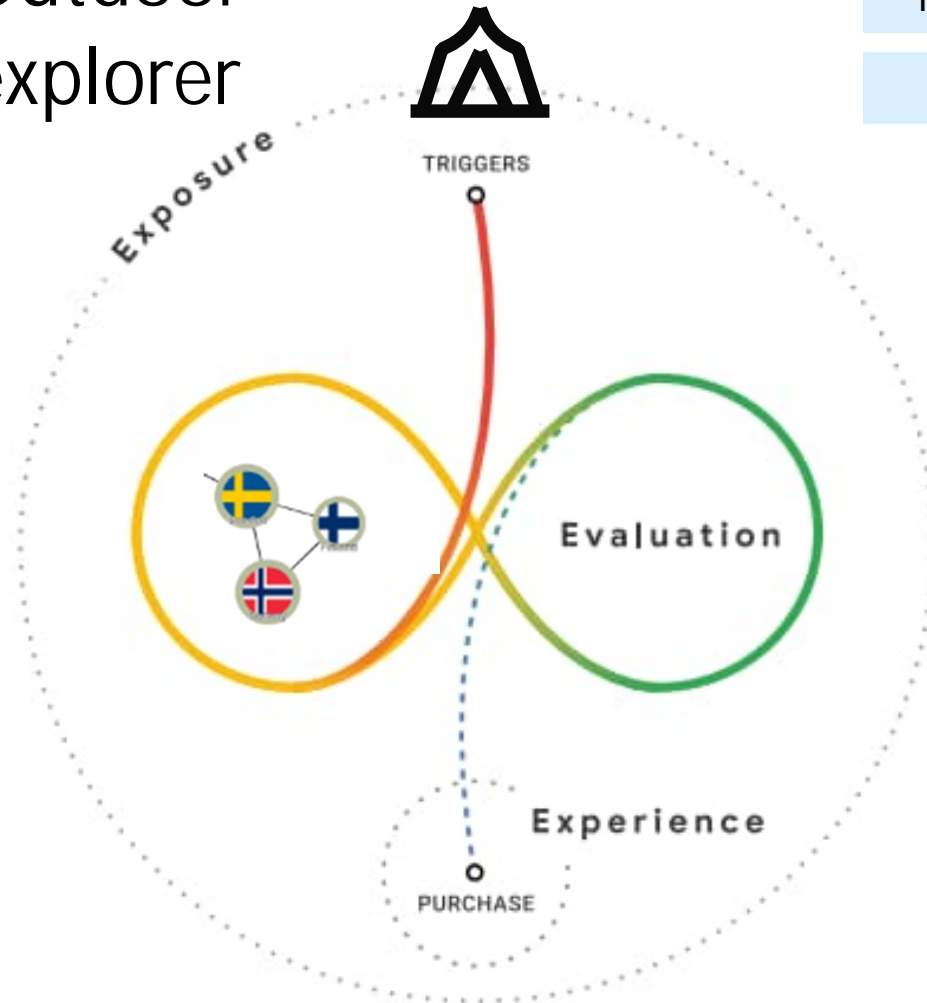


5: WHAT TO DO IN PRACTISE?

Recommendations and approaches for segment utilisation

How to develop your offering?

Outdoor
explorer



REAL NATURE

BIKING

CHILDREN

ACTIVE

HIKING

Start from the segment's
needs and think how well
your offering meets its needs



HIKING

BIKING

ACTIVE



REAL NATURE

CHILDREN

It seems that there are a lot relevant offering for Outdoor Explorer based on VisitFinland website

FINLAND



NORWAY



We went gravel biking with Formula 1 star Valtteri Bottas and fell in love with Finland's trails

F1 driver Valtteri Bottas shows off his slice of gravel heaven, and some seriously fun groads



(Image credit: Thomas Moheux)

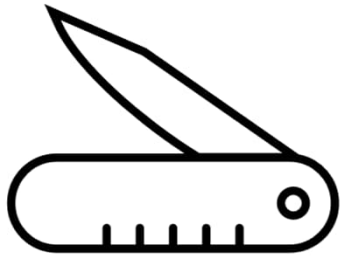
Try to find relevant, interesting and unique aspects to your communications. For example, an interesting story about biking possibilities can be a deal breaker and create needed uniqueness

Examples how to use segmentation



Service offering
inventory
exercise

1. QUESTION: What are we currently offering to each segment?
2. EXERCISE: Current offering i.e offering concepts, USP:s, marketing messages are divided to each segment. Each offering has to be placed only on a single segment
3. OUTCOME: Offering distribution by segment. In addition there could be short a description why
4. ANALYSIS: Why is the distribution this? Was it difficult to match the segments and offering? What should we change or develop?



Make sure your offering and message is **sharp and consistent** for each segment

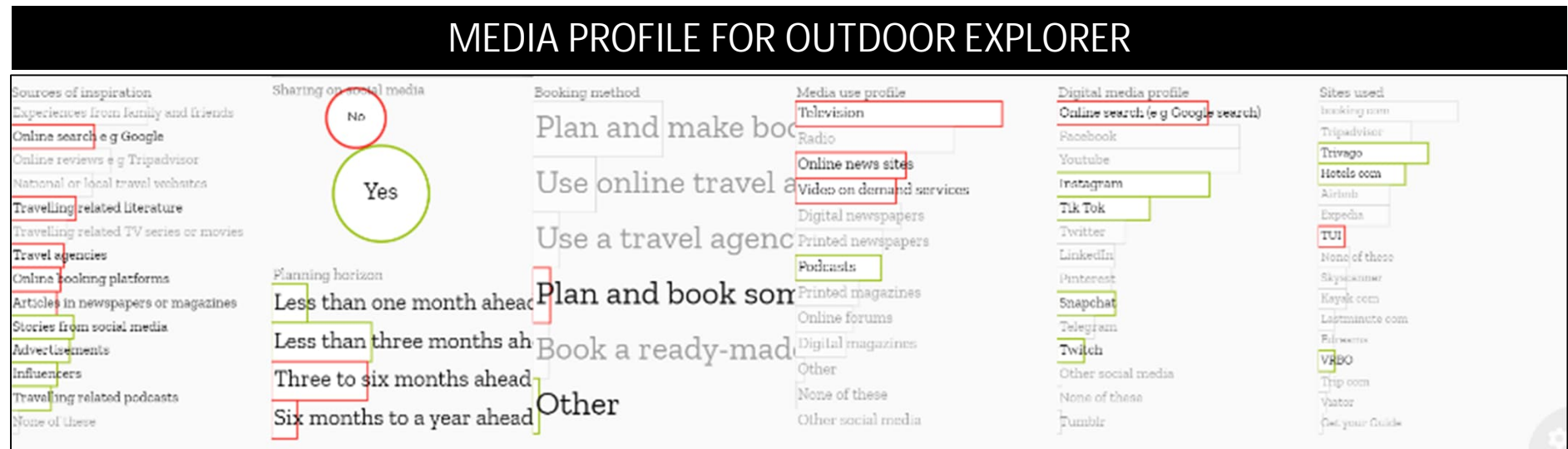
Segmentation should be utilized so that communication and services are developed separately for each target group. In this way, the offering could be made to meet the needs of consumers more precisely and also stand out more from the competition

Interesting offering is not enough



In addition you need to make sure that you reach your audience using right channels

Instagram and social media are good channels to reach Outdoor Explorer



Selected N = 493/ Total

How to reach Outdoor Explorer?



Social media stories and sharing reach better than average

Instagram and Tik Tok are profiling channels

Likely to start planning later than average

Instagram would be a good channel for this kind of a message



gravelcyclist • Follow

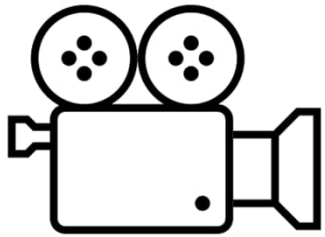
gravelcyclist Formula 1's @valtteribottas & @sbtgrvl team up for @fnldgrvl Finland! "Formula 1 driver Valtteri Bottas and the team behind SBT GRVL have announced FNLD GRVL, a new gravel event in Lahti, Finland, planned for June 2023. @visitlahti_official Details in the press release over at GravelCyclist.com 🥰 🏆 #gravelroads #gravelcycling #gravelcyclist #gravelgrinder #visitlahti #valtteribottas 48w

1lovemountains looks epic! 47w 1 like Reply

plater.steven Finland is one big gravel grinder! 🏆

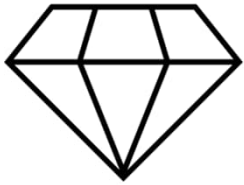
776 likes MAY 31, 2022

Add a comment... Post



Match **channels and content** for better reach

It's not enough just to have a relevant message or service, but the message must also reach the target group. Successful communication requires the right combination of content and channel, which segmentation also provides support for



FINLAND'S OFFERING NEEDS TO BE **SHARPER AND BETTER TARGETED AT** DIFFERENT SEGMENTS

In order to stand out, Finland's offer must be more strongly focused on the needs of different segments. Differentiation from Norway and Sweden in a relevant way is extremely important

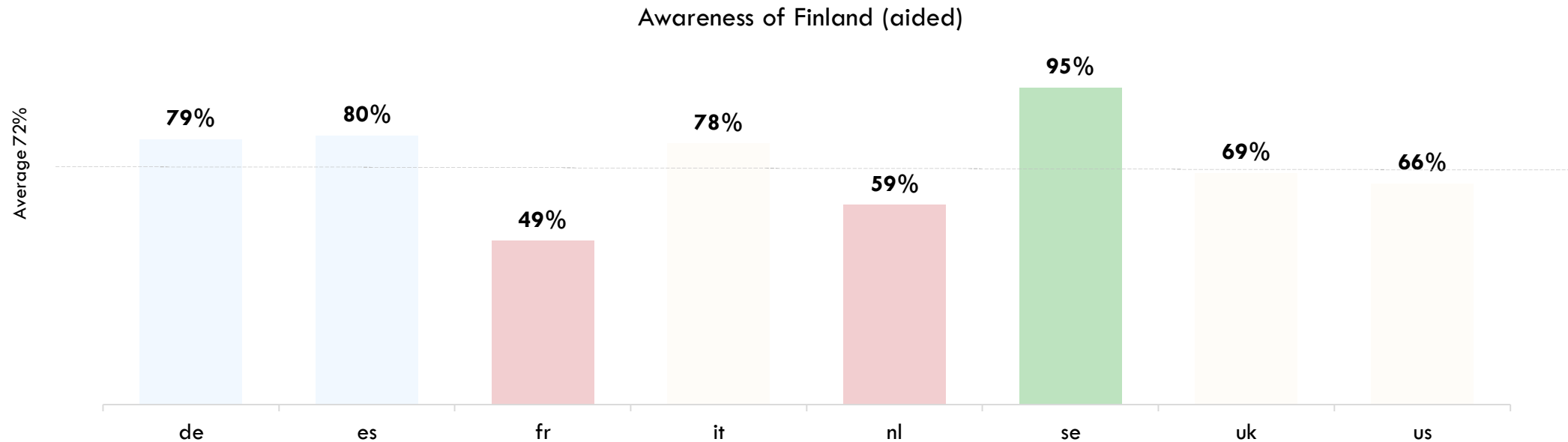


6. WHAT PROFILES DIFFERENT TARGET MARKETS?

Country level results

Finland is best known in Sweden

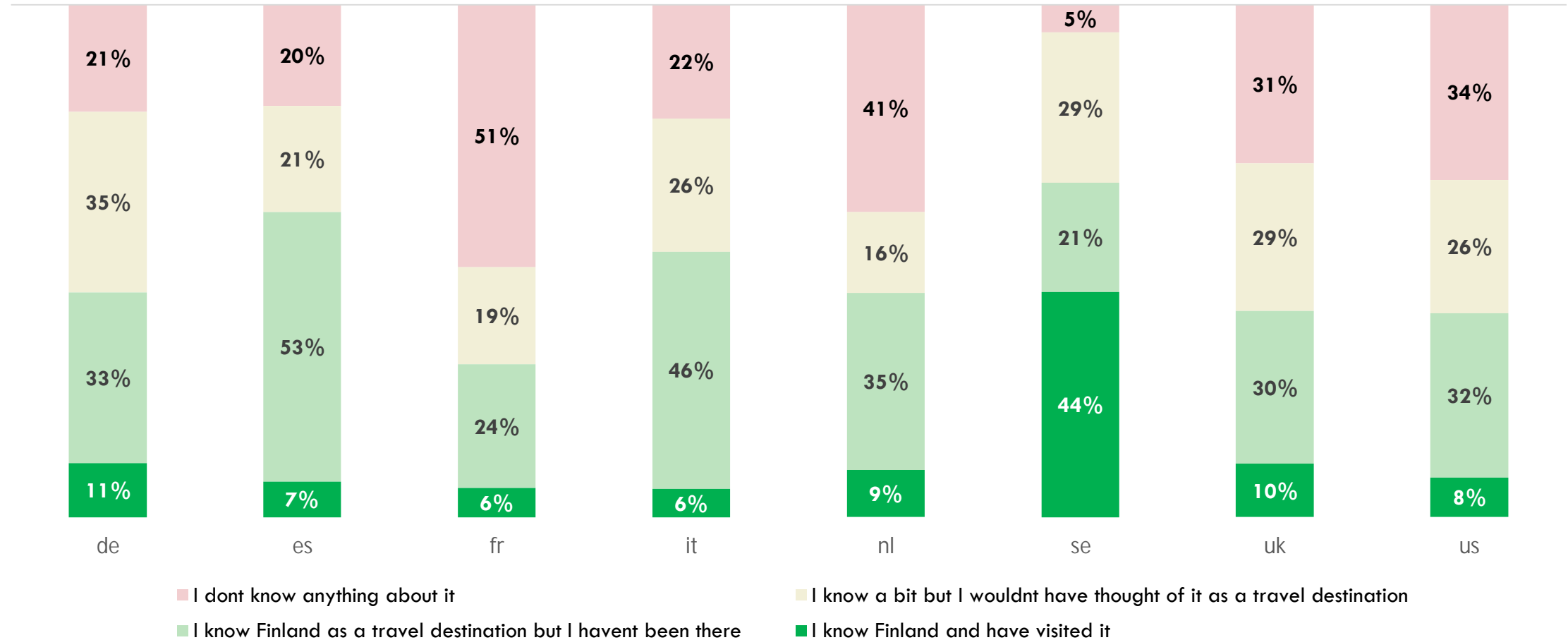
How well do you know Finland?



Share of respondents that know at least something about Finland

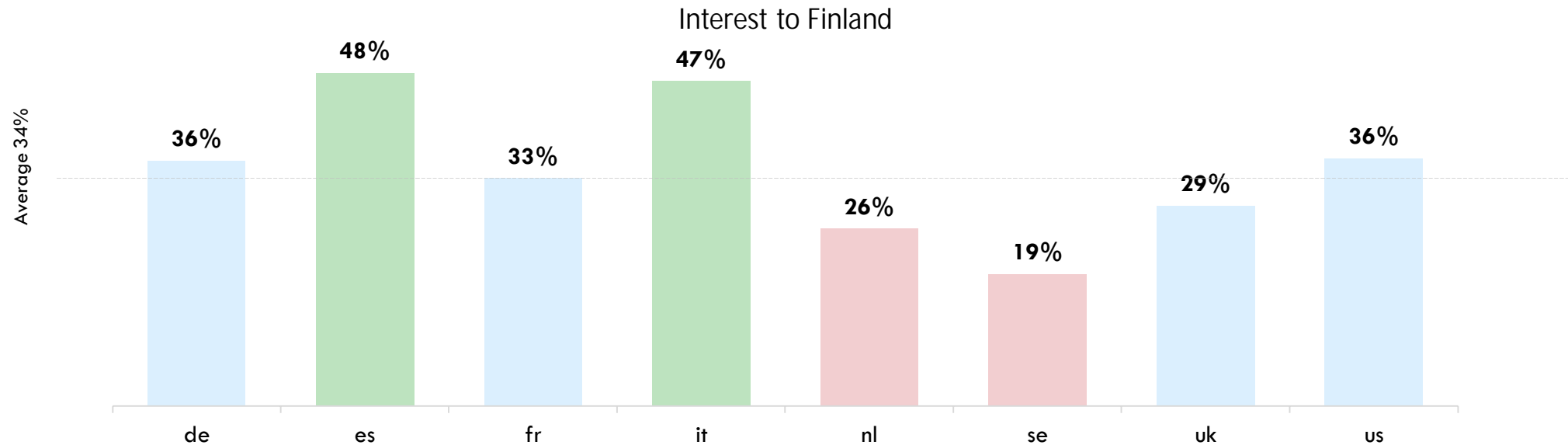
Swedes have clearly visited Finland the most

How well do you know Finland?



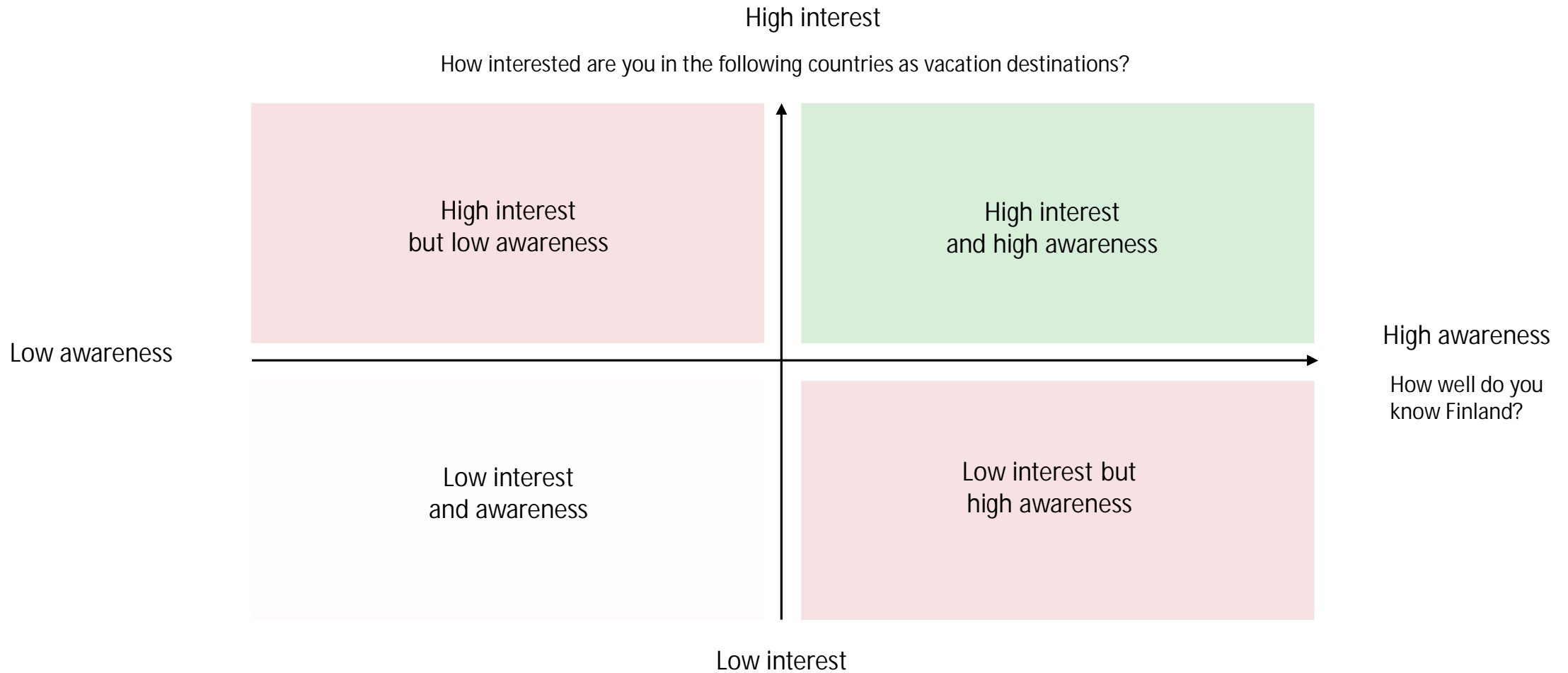
Finland arouses interest especially in Italy and Spain

How interested are you in the following countries as vacation destinations?

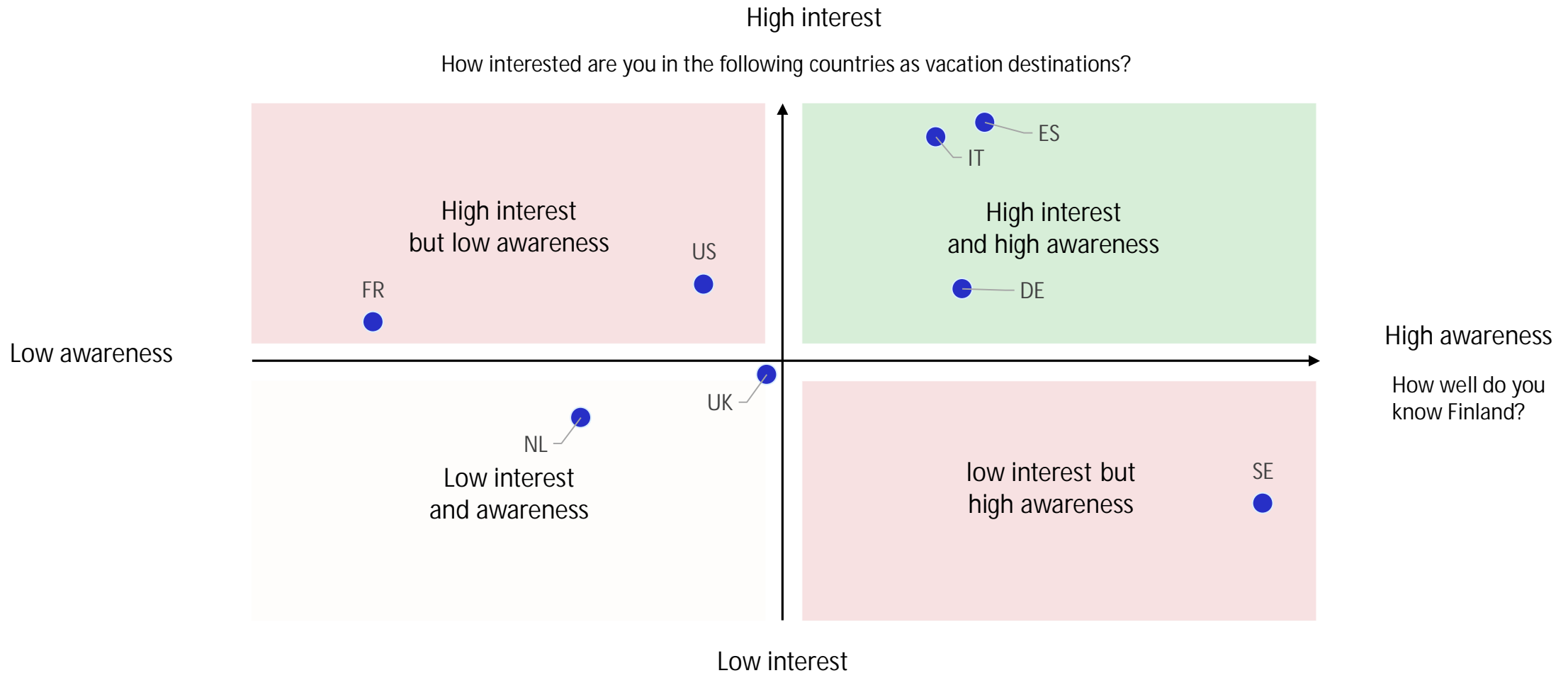


Share of respondents that are very interested in Finland as a vacation destination per country

We used two metrics to measure interest



Italy, Spain and Germany have the best current interest potential

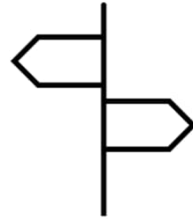


Why interest alone is not enough?



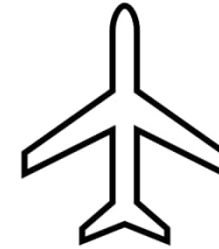
PURCHASING POWER

Finland is a rather expensive travel destination and not everyone who is interested can necessarily afford to travel to Finland. This can be the case, for example, in Italy



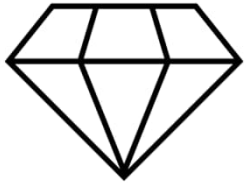
DISTANCE

Distance has a big impact. For example, Swedes are the least interested in Finland, but have visited Finland the most. Tourism in the surrounding areas is clearly different



CONNECTIONS

The study does not measure the available flight connections and it may be that, in many countries, poor flight connections set limitations to the potential



Finland arouses the most potential interest in Spain, Italy and Germany

The results clearly show that interest and travel volumes do not always go hand in hand. Although interest in Sweden is low, it is still a significant target market. Probably, tourism in the surrounding area has a different dynamics i.e from the point of view of Spain and Italy, Finland appears to be a very different destination than from Sweden. However, the results clearly show that there is potential in Spain, Germany and Italy, even if cultural differences affect the results

How to read country level results?

Germany – Overall vacation profile



Germans are interested in the sun and well-being

- In general Germans like vacations where they can relax.
- Sea, swimming and wellness are interesting topics in an overall level for Germans
- In general nature and countryside destinations are more interesting than big cities
- Culture related topics such as historic attractions seem less interesting

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Germany – What is the image of Finland



Natural beauty
A country with a lot of natural beauty, including forests, lakes, and breathtaking landscapes.

Unique, but also cold and expensive
Country is expensive, but not overrun by tourists, offering unique experiences for those seeking adventure

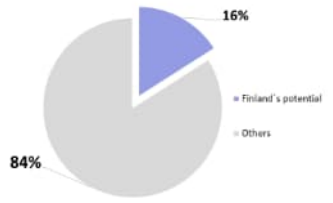
Northern lights and Lapland
Some people specifically mention the northern lights, and Lapland is noted as a popular destination.

Top of mind opinions about Finland from Germany

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Germany – Potential for Finland

Share of respondent with a high interest to Finland as a vacation destination



Key assumptions for estimated potential:

- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland

N = 414. Filter: [Country] = Germany [Age Group] = 18-34 [How often do you usually travel abroad for leisure?] = 1-2 times a year, 3-4 times per year, 5-8 times per year, 9-16 times per year, 17 times per year or more [How interested are you in travelling to Finland as a vacation destination?] = 3-5 (Very interested) [How well do you know Finland?] = 3-5 (Very well) [How often do you usually travel abroad for leisure?] = 1-2 times per year, 3-4 times per year, 5-8 times per year, 9-16 times per year, 17 times per year or more [How interested are you in travelling to Finland as a vacation destination?] = 3-5 (Very interested) [How well do you know Finland?] = 3-5 (Very well)

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Germany – Potential target groups for Finland

Segment shares in Germany



- Potential travellers from Germany like to be active and appreciate nature
- Open-mindedness, a strong income level and previous travel experience are also profiling themes
- There are potential in a number of segments but Active Hobbyist and Outdoor explorer stand out as the most profiling traveller segments
- Nature lover has also potential because of its size but the segment is not as strongly profiling

N = 409. Filter: [Core cluster] AND [Sample] & [Age] / 2x VERY INTERESTED IN FINLAND

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Germany – Potential segment profile



Active hobbyist is looking for adventures and excitement

- Adventure and excitement drives segment that has an interest to a wide range of sports and hobbies. Has also interest for nightlife
- Is widely interested in sports, but is also willing to try e.g. Finnish Sauna or husky ride
- Ideally would like to come to Finland during the summer or winter



An outdoor explorer is looking for an active nature experience

- A segment that appreciates outdoor nature and outdoor activities. Values its experience on active vacation that can include e.g. cycling or hiking
- Possibilities to hike in a national park and encounter with nature are interesting in Finland. Also Sauna is likely to be interesting
- Sustainability and eco-friendly choices are considered important
- Season and nature are the most interesting aspects to visit Finland

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Since the analysis was done primarily at the level of the entire sample, the country-specific results only give a rough indication of the potential and target groups. However, they give an indication of which segments the interest is focused on in different countries

Germany – Overall vacation profile



Germans are interested in the sun and well-being

- In general Germans like vacations where they can relax.
- Sea, swimming and wellness are interesting topics in an overall level for Germans
- In general nature and countryside destinations are more interesting than big cities
- Culture related topics such as historic attractions seem less interesting

Germany – What is the image of Finland



Top of mind opinions about Finland from Germany

Natural beauty

A country with a lot of natural beauty, including forests, lakes, and breathtaking landscapes.

Unique, but also cold and expensive

Country is expensive, but not overrun by tourists, offering unique experiences for those seeking adventure

Northern lights and Lapland

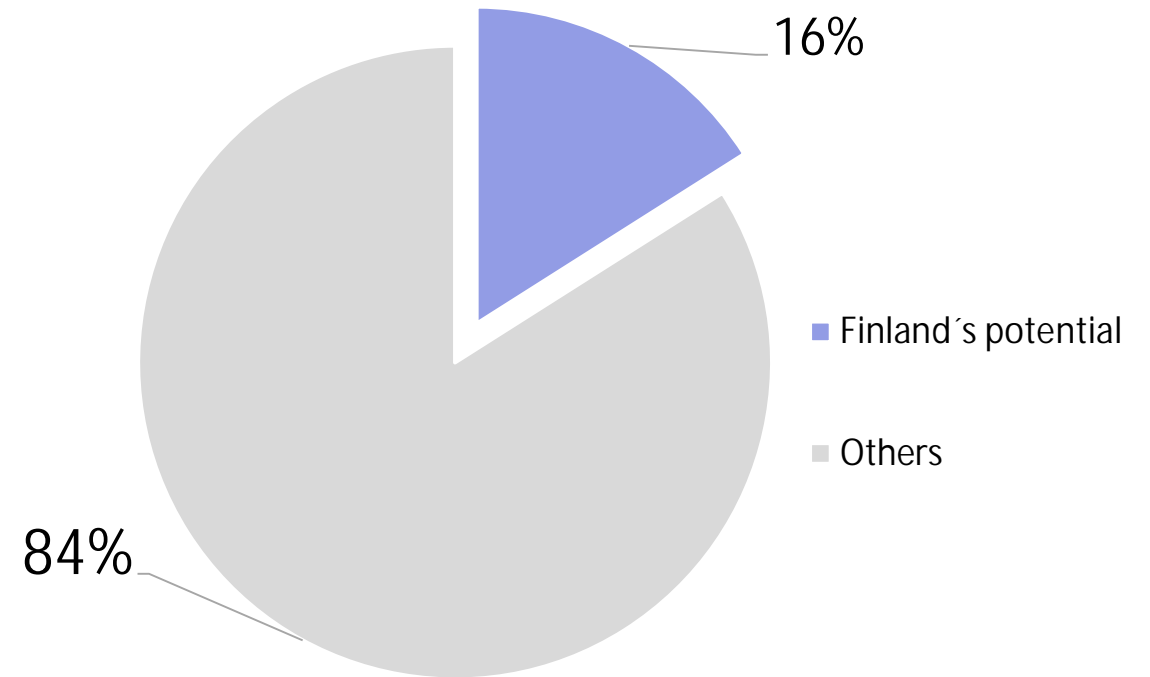
Some people specifically mention the northern lights, and Lapland is noted as a popular destination.

Germany – Potential for Finland

Share of respondent with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

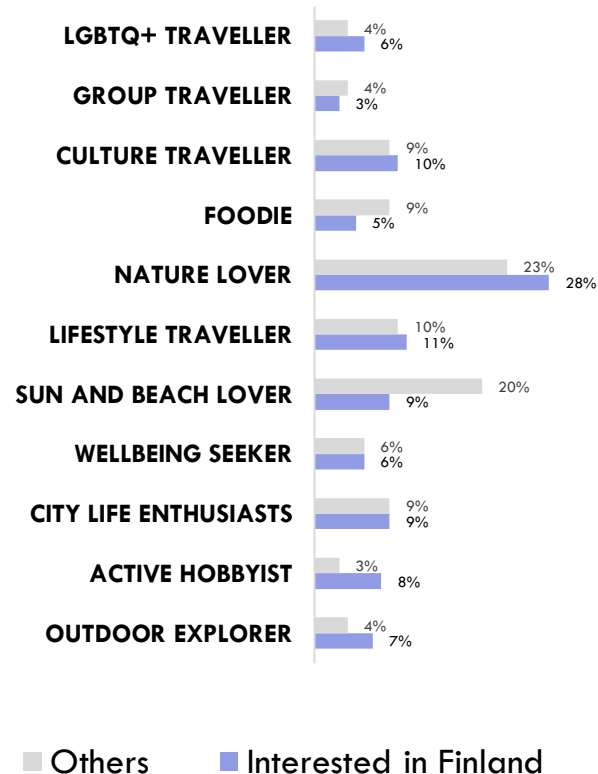
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N = 336. Filter: ([Finland] IS [Very interested]) AND ([Sample] IS [de]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it])

Germany – Potential target groups for Finland

Segment shares in Germany



- Potential travellers from Germany like to be active and appreciate nature
- Open-mindedness, a strong income level and previous travel experience are also profiling themes
- There are potential in a number of segments but Active Hobbyist and Outdoor explorer stand out as the most profiling traveller segments
- Nature lover has also potential because of its size but the segment is not as strongly profiling

N = 409. Filter: ([Core cluster] AND ([Sample] IS [de]/ 2x VERY INTERESTED IN FINLAND

Germany – Potential segment profile



Active hobbyist is looking for adventures and excitement



- Adventure and excitement driven segment that has an interest to a wide range of sports and hobbies. Has also interest for nightlife
- Is widely interested in sports, but is also willing to try e.g. Finnish Sauna or husky ride
- Ideally would like to come to Finland during the summer or winter



An outdoor explorer is looking for an active nature experience



- A segment that appreciates authentic nature and outdoor activities. Wants to experience an active vacation that can include e.g. cycling or hiking.
- Possibilities to hike in a national park and reconnect with nature are interesting in Finland. Also Sauna is likely to be interesting
- Sustainability and eco-friendly choices are considered important
- Summer and autumn are the most interesting seasons to visit Finland

UK – Overall vacation profile



In Great Britain, interest in animals and the countryside is emphasized

- In many ways, the profile of the leisure traveller in UK does not differ significantly from other countries
- The British seem to have a special interest in animals and the countryside. Interest in safaris is also a profiling topic
- British individuals tend to travel slightly more frequently than the average, yet they perceive their income level as slightly lower compared to other countries, resulting in a slightly lower travel budget as well.

UK – What is image of Finland



Top of mind opinions about Finland from UK

Beautiful but cold and expensive

The descriptions of Finland suggest that it is a cold and expensive country with beautiful scenery, including forests, lakes, and snow

Great nature and outdoor destination

Finland is known for the northern lights and is a popular destination for outdoor activities such as skiing and husky ride. Good destination for those interested in exploring nature

Unique culture

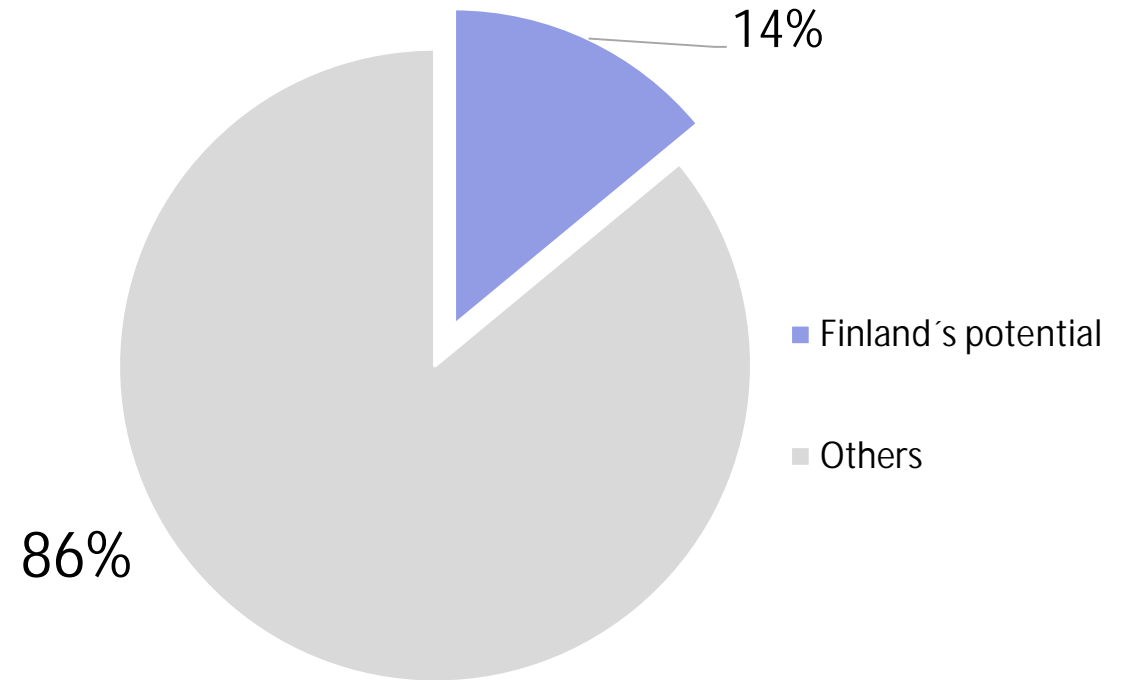
Helsinki, the capital, is known for its architecture. Finland is also mentioned for being the happiest country in the world and having a unique culture.

UK – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

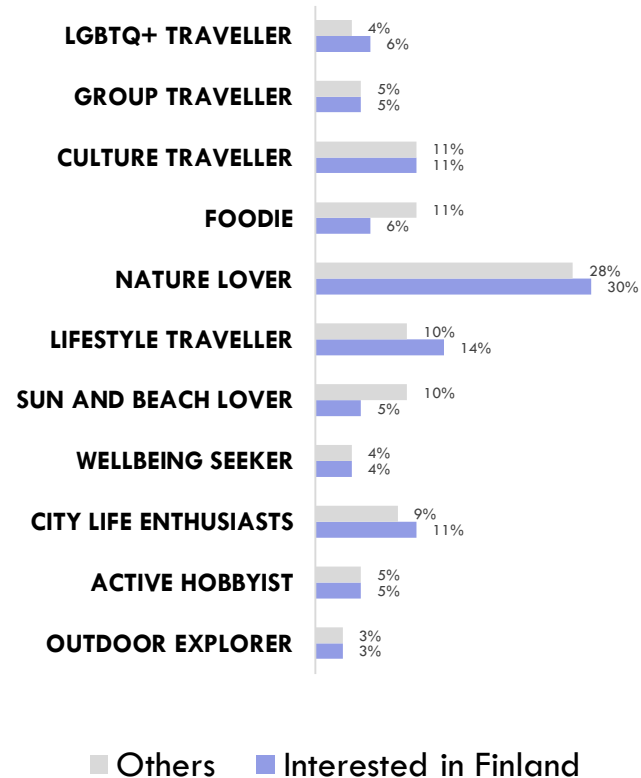
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



Selected N = 278. Filter: ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]) AND ([Sample] IS [uk])

UK – Potential target groups for Finland

Segment shares in UK



- Potential travellers interested in Finland are profiled by an interest in nature and a desire to be active
- They are often looking for exciting destinations and once in a lifetime experiences
- Overall, there is potential in several segments. For example Nature lover is a large segment, and its share is emphasized among those interested in Finland
- Foodie and Sun & Beach segments are less interested in Finland than usual, while the Lifestyle Traveller is a profiling segments in a positive sense

Selected N = 330. Filter: ([Sample] IS [uk]) AND ([Core cluster] / 2x VERY INTERESTED IN FINLAND)

UK – Potential segment profile



Nature lover is looking to see and experience the unique wonders the Finnish nature has to offer



- Traveller segment that is widely interested in nature and related phenomena. National parks, wildlife and arctic nature are example of topics that arouse interest
- Interested in reconnecting with nature and experiencing the natural wonders such as the northern lights, midnight sun and the autumn colors in forests. Experiencing snow and the arctic nature would also pique their interest.
- Has potential to visit Finland during several different seasons



Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- They exhibit a range of interests when it comes to Finland. Cultural experiences as well as experiencing authentic local lifestyle and reconnecting with nature stand out. They would be interested in discovering the charm of smaller towns such as Porvoo.
- Wants to be active and experience on vacation not to stay put. Touring and roundtrips are interesting for them.
- Has potential to visit Finland during several different seasons

Sweden – Overall vacation profile



Swedes are interested in the sun and good food

- Sun and good food are clearly important and profiling topics for Swedish leisure travellers whereas interest to nature and rural destinations is below average
- In comparison to other countries, Swedes are more interested in holiday travel in winter and autumn
- Price awareness and the desire to find good value for money is emphasized to some extent and travelling budget is below average

Sweden – What is the image of Finland



Top of mind opinions about Finland from SE

Beautiful but also similar to Sweden

Some find Finland interesting, beautiful, and with a lot of nature and history, while others find it a bit boring or similar to Sweden. Helsinki, is described as beautiful but expensive

Distinctive culture and language

The Finnish culture, language, and design are mentioned as distinctive features. The people are generally seen as friendly, but the language can be difficult to understand.

Sauna, lakes and nature

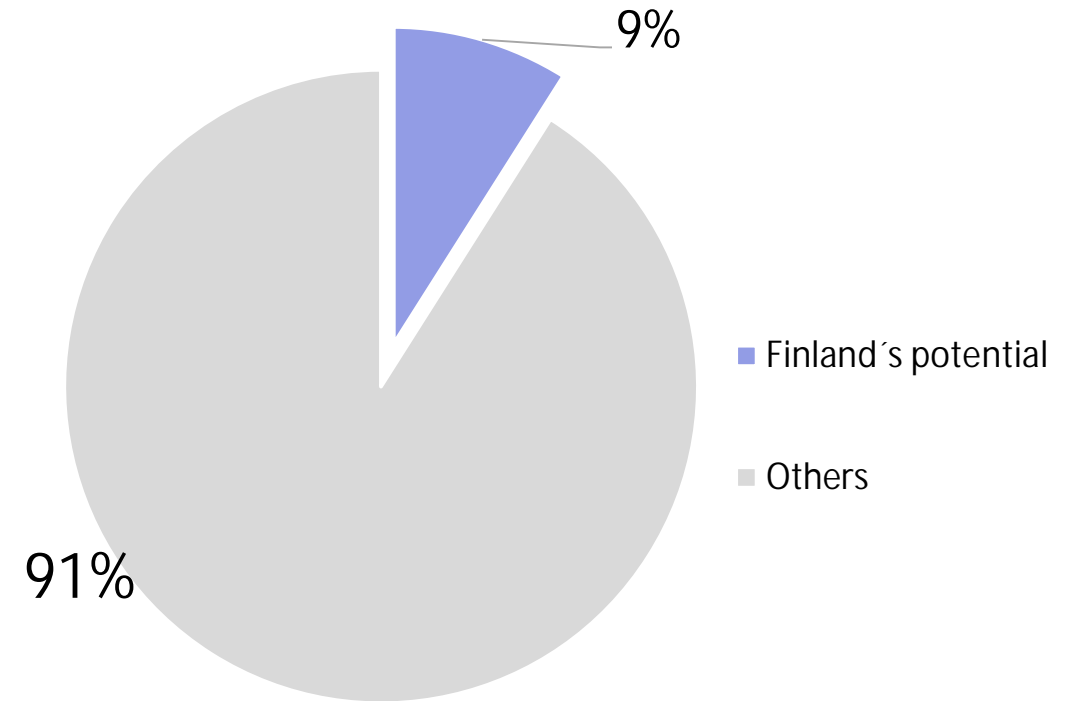
For Swedes Finland is also known for its lakes and sauna culture. Some recommend visiting Finland for nature or outdoor activities

Sweden – Potential for Finland

Share of respondents with a high interest to Finland as vacation destination

Key assumptions for estimated potential:

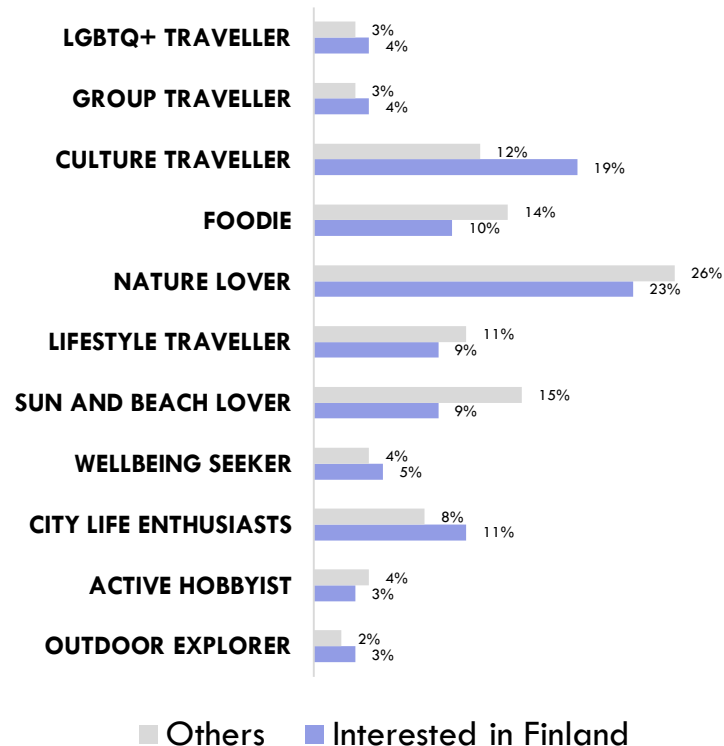
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N = 172. Filter: (([Finland] IS [Very interested])) AND (([Sample] IS [SE])) AND (([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more])) AND (([How interested would you be in traveling to Finland on vacation?] IS [Very interested])) AND (([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]))

Sweden – Potential target groups for Finland

Segment shares in Sweden



- A common factor among potential travellers to Finland is their interest in culture. Helsinki and old towns such as Porvoo are potentially interesting places to visit.
- In addition to urban interest areas also lakes and archipelago are appealing topics to some extent
- Swedish are most interested in visiting Finland during the summer.
- All in all there are potential in several segments but culture traveller segment is clearly the most profiling segment

N = 188. Filter: ([Core cluster] AND ([Sample] IS [SE]/ 2x VERY INTERESTED IN FINLAND

Sweden – Potential segment profile



Culture travellers have a wide interest in all cultural offering and historical sites



- Traveller segment that is eager to learn new and has a wide interest to different culture related topics such as history, design, art and architecture. Cities and urban destinations are interesting
- Helsinki and its culture offering is clearly interesting. Especially architecture and design are areas of interest. Also old wooden towns such as Porvoo is likely to be interesting.
- Ideally would like to come to Finland in the summer

Spain – Overall vacation profile



The spaniards are interested in culture and cities

- Spaniards have a preference for vacations that offer cultural experiences and gastronomic delights.
- They show a particular interest in historic attractions, architecture, and classic culture. Wellness retreats and cruises might also capture their attention.
- Overall, Spaniards find urban environment and visits to cities more appealing than travellers in other countries

Spain – What is the image of Finland



Top of mind opinions about Finland from Spain

Spectacular nature

Finland is seen as a cold and snowy country with spectacular natural scenery, including forests, lakes, and the potential to see the Northern Lights. Overall, many express interest in visiting Finland for its unique landscape

Unique culture and modern society

Finland's modernity and cultural offering was also mentioned in some comments

Partly unknown

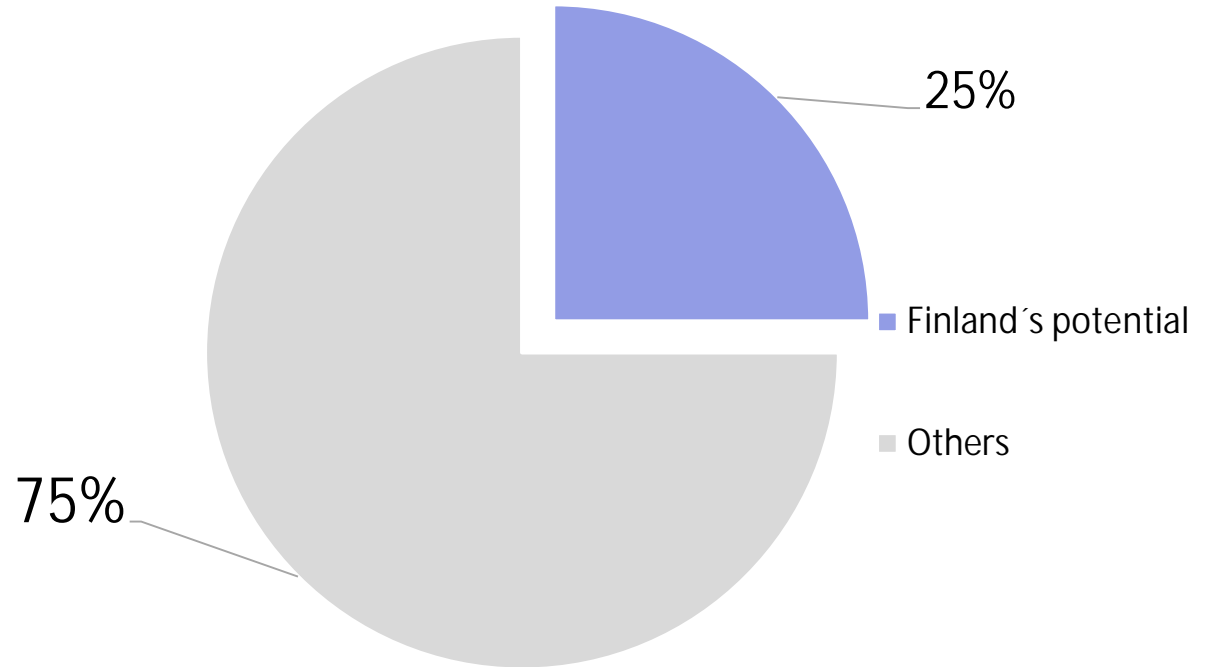
Others describe it as an unknown or distant destination, or note that they do not know much about it. A few describe it as expensive or having limited daylight in winter.

Spain – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

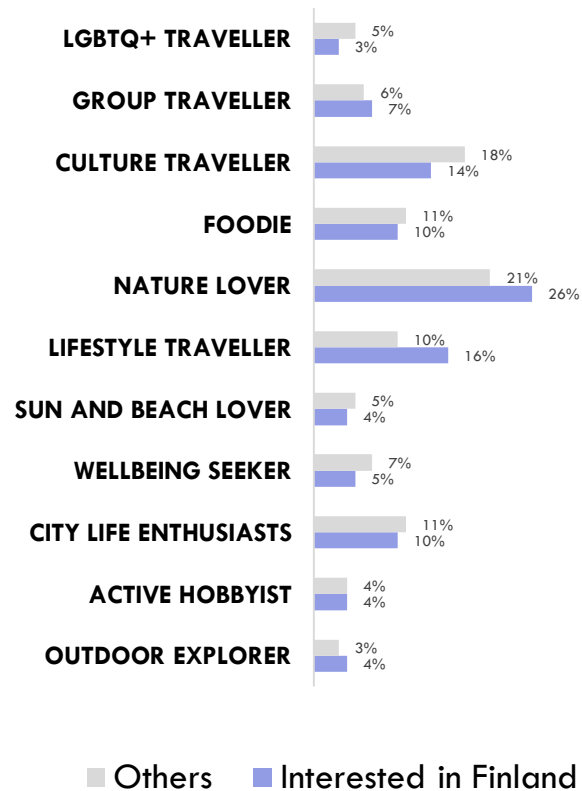
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N=500 Selected: ([Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Sample] IS [es])

Spain – Potential target groups for Finland

Segment shares in Spain



- Those interested in Finland are profiled by both an interest in nature and culture. The role of food is also important
- Nature, authentic experiences and local culture stand out as areas of interest. Local culture and lifestyle related topics are likely to be interesting
- All in all there are potential in several segments, but Lifestyle traveller segment is clearly a profiling segment and also Nature lover segment stands out

N = 625. Filter: ([Core cluster] AND ([Sample] IS [ES]/ 2x VERY INTERESTED IN FINLAND

Spain – Potential segment profile



Nature lover is looking to see and experience the unique wonders the Finnish nature has to offer



- Traveller segment that is widely interested in nature and related phenomena. National parks, wildlife and arctic nature are example of topics that arouse interest
- Interested in reconnecting with nature and experiencing the natural wonders such as the northern lights, midnight sun and the Finnish lakes. Arctic nature and national parks are also interesting topics
- Has potential to visit Finland during several different seasons



Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- They exhibit a range of interests when it comes to Finland. Cultural experiences as well as experiencing authentic local lifestyle and reconnecting with nature stand out. They would be interested in discovering the charm of smaller towns such as Porvoo.
- Wants to be active and experience on vacation and not to stay put. Touring and roundtrips are interesting for them.
- Has potential to visit Finland during several different seasons

Italy – Overall vacation profile



Italians are interested in an active vacation in an urban environment

- Italians are active and social travellers who are particularly interested in culture and urban destinations
- Interesting topics can be found e.g. on the themes of culture and wellbeing
- Sightseeing in the city or exploring museums are likely to be interesting themes, while rural destinations and nature arouse less interest

Italy – What is the image of Finland



Positive overall image

The responses about Finland were generally positive, with many people citing the country's high standard of living, excellent education system, natural beauty, and friendly people.



Cold and beautiful

Some people also mentioned Finland's cold climate. Overall, the majority of responses were favorable towards Finland and country's natural beauty, and friendly people were praised.

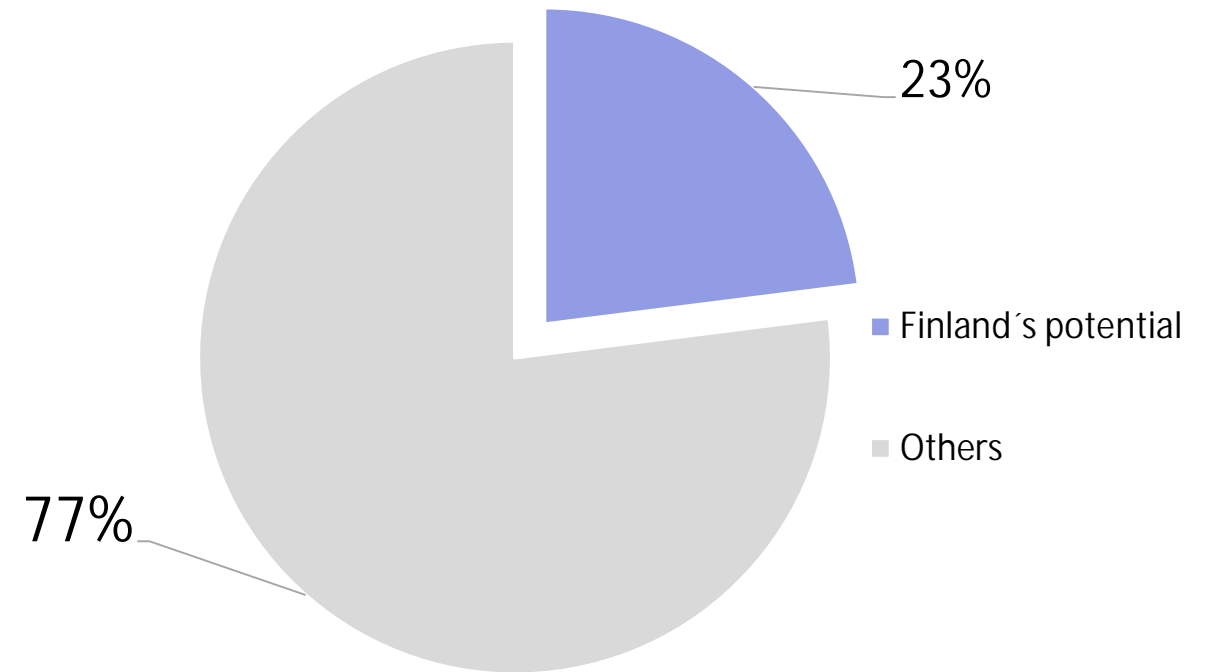
Top of mind opinions about Finland from Italy

Italy – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

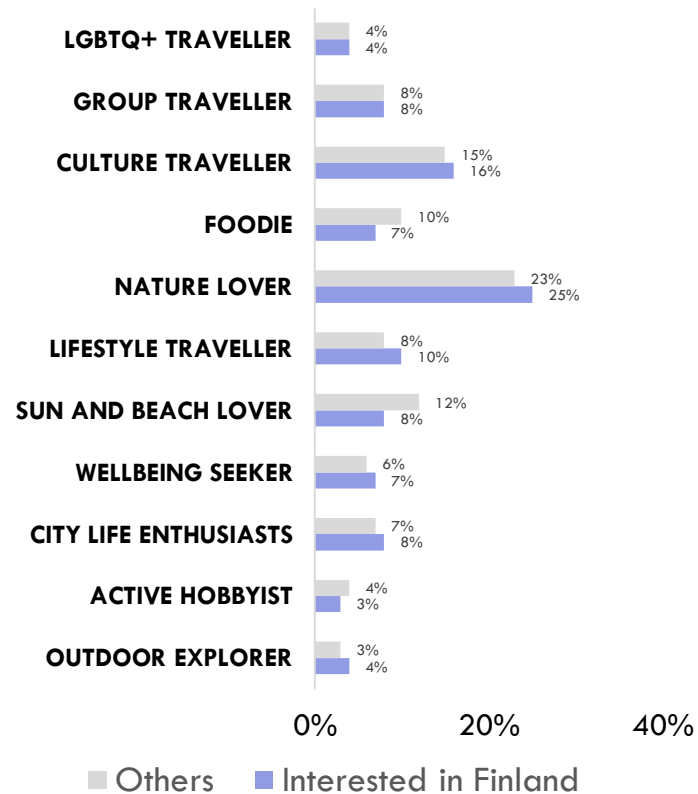
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N=463 Selected: ([Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Sample] IS [IT])

Italy – Potential target groups for Finland

Segment shares in Italy



- Those interested in Finland are profiled by the desire to take interesting trips and gain once-in-a-lifetime experiences
- Italians are interested in visiting Finland during the summer or spring. Potential travellers are early adopters with a broad interest in a wide range of topics ranging from culture to arctic nature
- Interest at the target group level is also not strongly focused on one segment. Nature Lover and Lifestyle traveller appear as potentially interesting segments

N = 585. Filter: ([Core cluster] AND ([Sample] IS [IT]/ 2x VERY INTERESTED IN FINLAND

Italy – Potential segment profile



Nature lover is looking to see and experience the unique wonders the Finnish nature has to offer



- Traveller segment that is widely interested in nature and related phenomena. National parks, wildlife and arctic nature are example of topics that arouse interest
- Target group is looking to reconnect with nature. Hiking in a national park, experiencing snow and arctic nature or spending the night in a glass hut accommodation could be potentially interesting topics. Also Finnish lakes are clearly an interesting topic
- Has potential to visit Finland during several different seasons



Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- The segment has a wide range of interests when it comes to Finland. Possibility to meet Sami people or experience Finnish lakes and archipelago could be interesting topics
- Has potential to visit Finland during several different seasons

France – Overall vacation profile



The French value both pampering and excitement

- The French want to pamper themselves on vacation. They appreciate good food but at the same time value for money is important
- The French are interested in a wide range of different things and sometimes are also seeking for an adventure and excitement
- They have a wide range of interest areas ranging from urban culture to nature experiences. Furthermore, the French find enjoyment in swimming

France – What is the image of Finland



Top of mind opinions about Finland from France

Natural landscapes and outdoor activities

Finland is praised for its magnificent natural landscapes, including lakes, forests and mountains. This makes it an ideal destination for outdoor activities and winter sports. However, some are deterred by the cold temperatures

Unique culture

Finland is mentioned to have an unique culture and modern attitudes towards the environment and wellbeing. Also the good quality of life and friendly people were mentioned

Local attractions

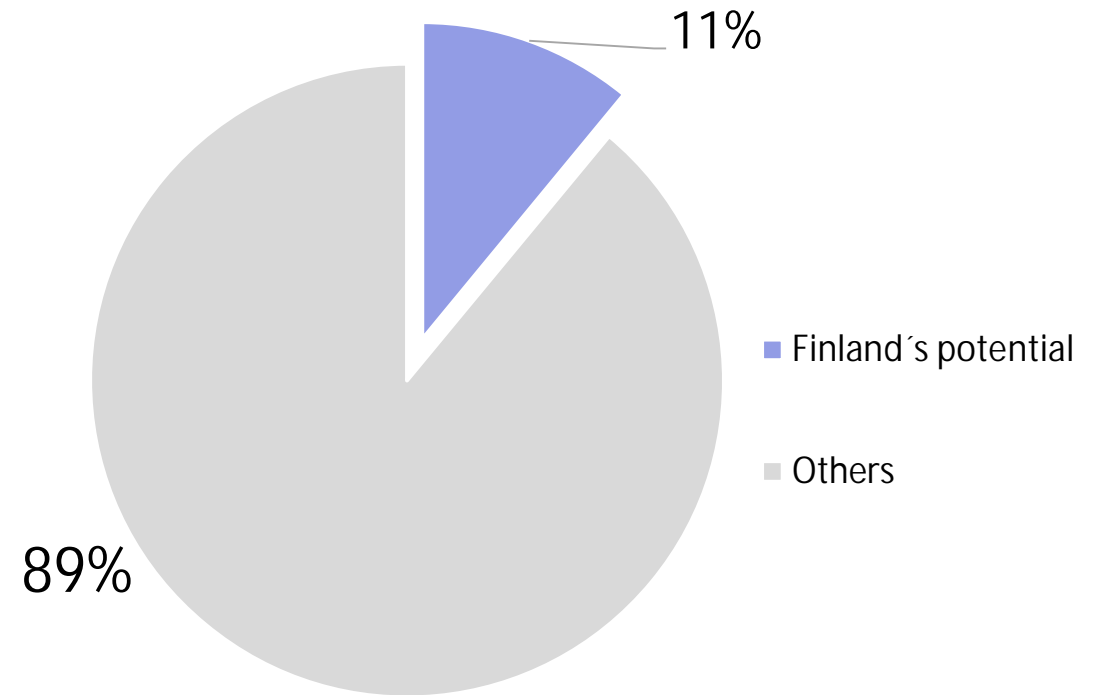
The Northern Lights, local cuisine and the Santa Claus are mentioned as interesting attractions.

France – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

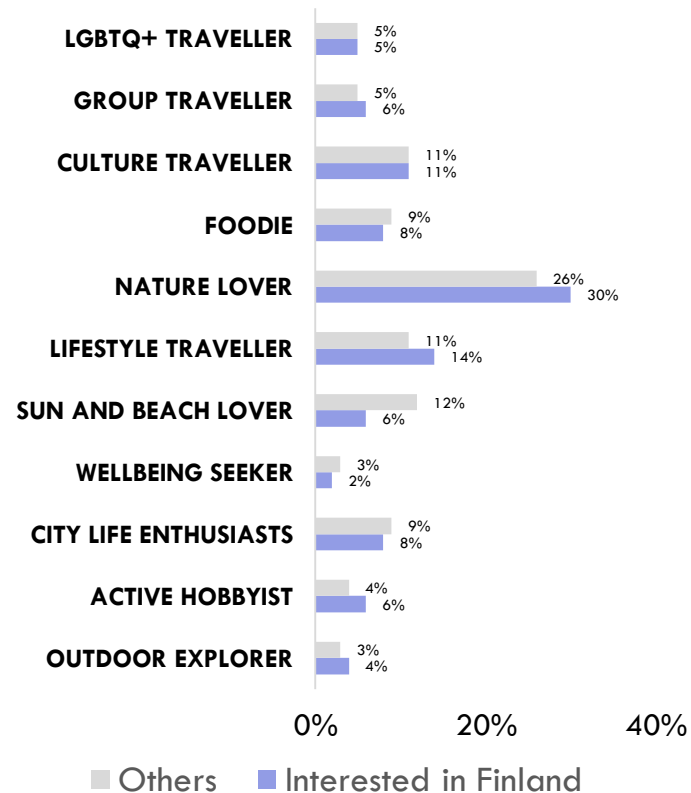
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N=218 Selected: ([Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Sample] IS [FR])

France – Potential target groups for Finland

Segment shares in France



- Travelers interested in Finland are united by a desire for adventure and an interest in sustainable travelling
- Potential travellers have an interest in nature and outdoor activities. Local culture, smaller towns and the countryside are also potentially interesting topics.
- The French are interested in visiting Finland during the spring or autumn and also winter.
- There is interest towards Finland in many segments, but the interest is most prominent among Nature lovers and Lifestyle travellers. Also active hobbyist is a potentially interesting segment

N = 402. Filter: ([Core cluster] AND ([Sample] IS [FR])/ 2x VERY INTERESTED IN FINLAND

France – Potential segment profile



Nature lover is looking to see and experience the unique wonders the Finnish nature has to offer



- Traveller segment that is widely interested in nature and related phenomena. National parks, wildlife and arctic nature are example of topics that arouse interest
- Interested in experiencing the natural wonders such as the northern lights, midnight sun as well as snow and the arctic nature. Experiencing Finnish lakes would also pique their interest.
- Likes to be active when travelling. Eco-friendly destinations are considered interesting
- Has potential to visit Finland during several different seasons, but winter stands out a profiling season



Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- Their interests span across various aspects of Finland, including cultural experiences, nature exploration, and connecting with the local way of life. They are keen on discovering the allure of smaller towns and and they are also intrigued by the opportunity to engage with the indigenous Sami people. In terms of nature, they are particularly interested in rural destinations and the arctic environment.
- Ideally would like to come to Finland during spring

USA – Overall vacation profile



The Americans have an interest to urban travelling

- Culture, shopping, culinary experiences and also night life stand out as profiling interest areas whereas nature and rural destinations are less interesting
- The Americans are actively looking for once in a lifetime experiences and adventures.
- Furthermore, the American travellers often have higher income levels and larger budgets allocated for traveling to Europe.
- Higher purchasing power makes them more likely to enjoy more luxurious accommodations and explore a wider range of attractions and activities.

USA – What is the image of Finland



Unknown to many

The responses are varied, with some people not having any knowledge or experience of Finland.

Northern lights and outdoor activities

Many associate Finland with a cold climate and outdoor activities, such as skiing, hiking, and experiencing the Northern Lights.

Unique and friendly culture

Some mention its unique culture and architecture while others note its friendly people and natural scenery.

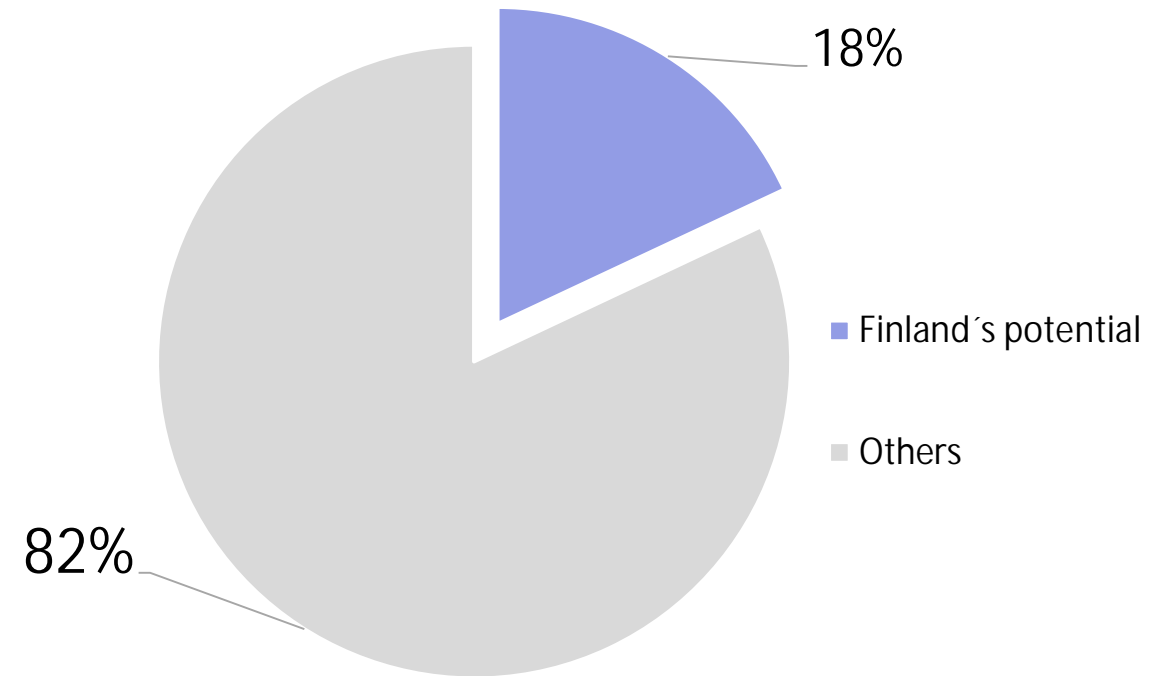
Top of mind opinions about Finland from US

USA – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

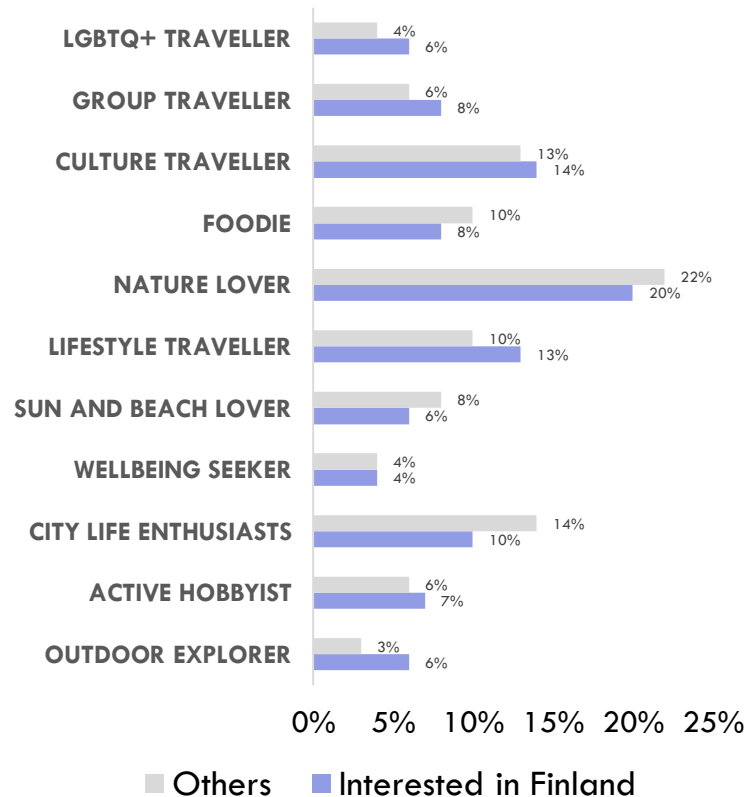
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has some knowledge about Finland



N=358 Selected: ([Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldn't have thought of it as a travel destination, I know Finland as a travel destination but I haven't been there, I know Finland and have visited it]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Sample] IS [US])

USA – Potential target groups for Finland

Segment shares in the USA



- Those interested in Finland are united by a desire for adventure and to experience something new. They are also frequent travellers with above average purchasing power
- They like to be active, and they have a wide variety of interests. Interesting topics range from the arctic nature to Finnish design.
- They also have an interest to arrive to Finland during different seasons, but summer and spring are the most potential seasons
- The most profiling segments are Outdoor explorers and Lifestyle travellers. Also Active hobbyist could be potentially interesting segment

N = 488. Filter: ([Core cluster] AND ([Sample] IS [US]/ 2x VERY INTERESTED IN FINLAND

USA – Potential segment profile



An outdoor explorer is looking for an active nature experience



- A segment that appreciates authentic nature and outdoor activities. Wants to experience an active vacation that can include e.g. cycling or hiking
- They are in search of genuine nature encounters, such as exploring Finnish lakes or engaging in hiking/mountain biking within a national park. The allure of experiencing snow and the arctic environment greatly appeals to them.
- Has potential to visit Finland during several different seasons, but spring and winter stand out as profiling seasons



Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- Possibility to reconnect with nature, experience the midnight sun, meet Sami people and explore the archipelago could be interesting topics. Clean air is also an appealing topic
- Has potential to visit Finland during several different seasons

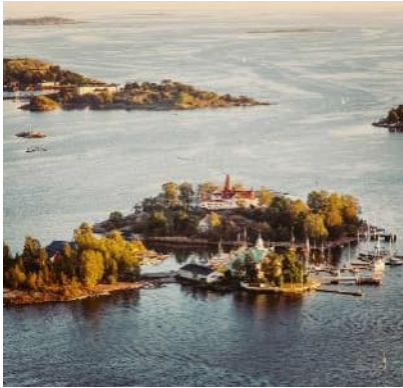
Netherlands – Overall vacation profile



The Dutch are interested in nature

- Nature holds a special allure for the Dutch, who display a keen interest in various outdoor activities such as hiking, biking, and swimming.
- Alongside their affinity for nature, the Dutch also find visits to smaller towns appealing, appreciating the charm and authenticity these places offer.
- They are more interested in holiday travel in summer than others

Netherlands – What is the image of Finland



Top of mind opinions about Finland from Netherlands

Natural beauty and climate

The majority of descriptions about Finland revolve around its natural beauty, with a particular emphasis on the country's cold climate. Many people highlight Finland as a peaceful and relaxing destination with a welcoming atmosphere.

Lapland and winter delights

Lapland stands out as an especially beautiful area during winter, offering opportunities to witness the Northern Lights. The abundance of water and forests in Finland is also mentioned by some.

Helsinki and unique experiences

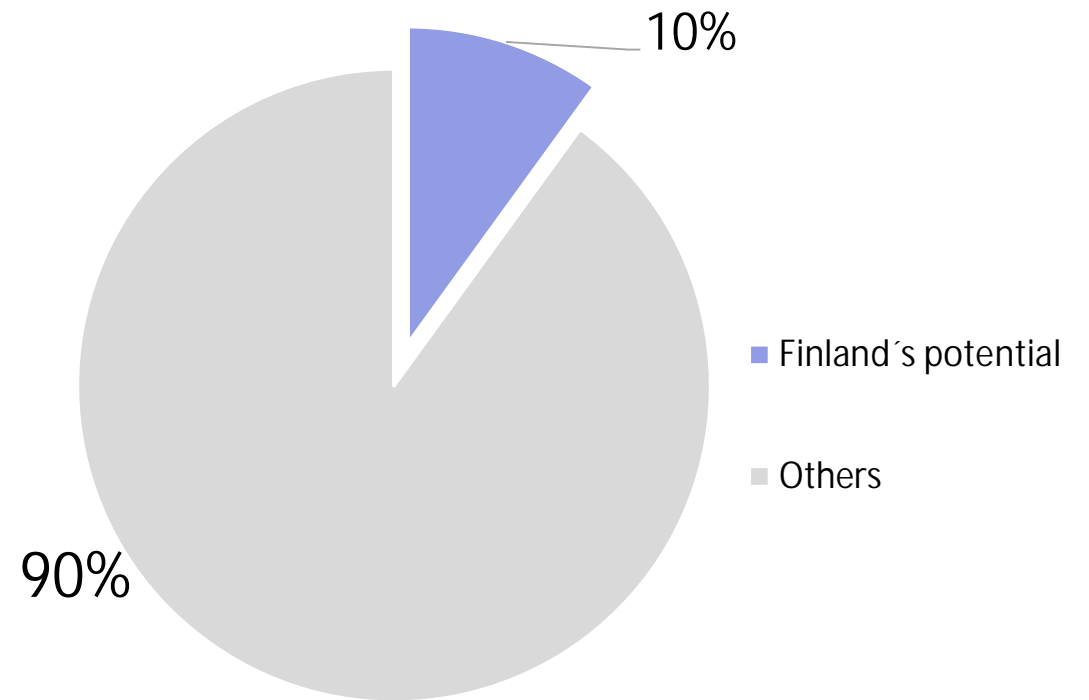
Helsinki, the capital city, is mentioned as an interesting destination. Finland as a whole is described as a unique, authentic, and adventurous country to visit.

Netherlands – Potential for Finland

Share of respondents with a high interest to Finland as a vacation destination

Key assumptions for estimated potential:

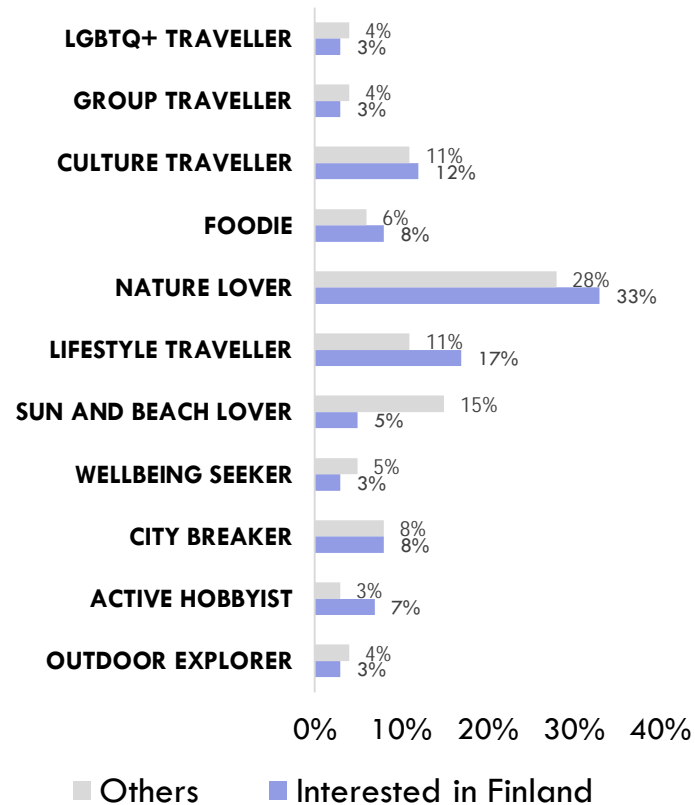
- Very interested in travelling to Finland
- Travels abroad at least every 2-3 years
- Has also high interest for Finland as destination
- Has a some knowledge about Finland



N=210 Selected: ((Finland] IS [Very interested]) AND ([How often do you usually travel abroad for leisure?] IN [Every 2-3 years, Once per year, 2-3 times per year, 4-6 times per year, 7 times per year or more]) AND ([How well do you know Finland?] IN [I know a bit but I wouldnt have thought of it as a travel destination, I know Finland as a travel destination but I havent been there, I know Finland and have visited it]) AND ([How interested would you be in traveling to Finland on vacation?] IS [Very interested]) AND ([Sample] IS [NL])

Netherlands – Potential target groups for Finland

Segment shares in Netherlands



N = 275. Filter: ([Core cluster] AND ([Sample] IS [NL]/ 2x VERY INTERESTED IN FINLAND

- Potential travellers for Finland have an interest in nature, outdoor activities and sports
- Travellers from Netherlands are interested in visiting Finland in all seasons
- There are potential in a number of segments but Active hobbyists and Lifestyle travellers stand out as the most potential traveller segments
- Nature lover has also potential because of its size but the segment is not as strongly profiling

Netherlands – Potential segment profile



Active hobbyist is looking for adventures and excitement



- Adventure and excitement driven segment that has an interest to a wide range of sports and hobbies. Has also interest for nightlife
- Is widely interested in sports, but is also willing to try a husky ride or spend a night in a glass igloo
- Winter is a profiling seasons to visit Finland



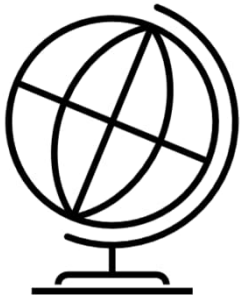
Lifestyle traveller wants to experience the authentic local lifestyle



- A segment that is interested in travelling off the beaten track and finding authentic local culture and lifestyle. Is open to experiences and interested in getting to know a wide variety of destinations. Interested in new and wants to avoid known tourist destinations
- They have a diverse range of interests when it comes to exploring Finland. They hold a strong interest in engaging with the indigenous Sami people and are also drawn to the allure of smaller towns. They find hiking in national parks and experiencing the beauty of Finnish lakes highly appealing.
- Winter and spring are profiling seasons to visit Finland

Profiling segments for each country

	GERMANY	NETHERLANDS	FRANCE	UK	SPAIN	USA	ITALY	SWEDEN
OUTDOOR EXPLORER	High	Low	Low	Low	Low	High	Low	Low
ACTIVE HOBBYIST	High	High	High	Low	Low	Low	Low	Low
CITY LIFE ENTHUSIAST	Low	Low	Low	High	Low	None	Low	High
WELLBEING SEEKER	Low	None	None	Low	None	Low	High	Low
SUN AND BEACH LOVER	None	None	None	None	None	None	None	None
LIFESTYLE TRAVELLER	Low	High	High	High	High	High	Low	None
NATURE LOVER	High	High	High	High	High	None	Low	None
FOODIE	None	None	None	None	None	None	None	None
CULTURE TRAVELLER	Low	Low	Low	Low	None	Low	High	High
GROUP TRAVELLER	None	Low	Low	Low	Low	High	High	Low
LGBTQ+ TRAVELLER	Low	Low	Low	High	None	High	Low	Low



Finland has potential in **several countries and segments**

Although there are some differences in the country-specific results, there seems to be interest in several different segments in all countries. However, it is important to remember that the interest indicate only possible potential, and the actual choice decision is affected by many factors such as offering, prices, connections and competition.

