How to reach Finland’s full potential?

Visit Finland, potential, position and segmentation study for Finland
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
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.
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.
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.
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.
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?

Interest to Finland as vacation destination

- 24% Not interested
- 41% Somewhat interested
- 34% Very interested

Total sample N=16240
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

Total sample N=16240
In terms of interest, Finland ranks a bit below the middle

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

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

Total sample N=16240
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.

How interested are you in the following countries as vacation destinations? / Total sample N=16240
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

How interested are you in the following countries as vacation destinations? / Total sample N=16240
Finland creates a connection to Estonia

Data visualisation based on interest correlations

Spain and Portugal are linked whereas Greece is still more unique.

Austria and Switzerland are associated but Germany is still separate.

How interested are you in the following countries as vacation destinations? Total sample N=16240
There are clearly four main groups

Data visualisation based on interest correlations

"MEDITERRANEAN AREA"

"WESTERN EUROPE"

"EASTERN EUROPE"

"NORTHERN EUROPE"

How interested are you in the following countries as vacation destinations? Total sample N=16240
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?

- Finland: 24% Very interested, 41% Somewhat interested, 34% Not interested
- Denmark: 20% Very interested, 45% Somewhat interested, 35% Not interested
- Sweden: 17% Very interested, 42% Somewhat interested, 42% Not interested
- Iceland: 22% Very interested, 36% Somewhat interested, 42% Not interested
- Norway: 18% Very interested, 39% Somewhat interested, 43% Not interested

Total sample N=16240
Big well known countries face less competition than small ones

![Graph showing competition vs interest for various countries]

Total sample N=16240/ Competition landscape analysis
Those interested in Finland have a wide interest in other countries as well.

COMPETITIVE LANDSCAPE FOR FINLAND – LEVEL OF COMPETITION

- **LOW** 4%
- **MEDIUM** 19%
- **HIGH** 77%

Number of other countries considered interesting in addition to Finland

How interested are you in the following countries as vacation destinations? Those respondents that are very interested in Finland as a vacation destination N=5567
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?

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>2.58</td>
</tr>
<tr>
<td>Spain</td>
<td>2.52</td>
</tr>
<tr>
<td>Greece</td>
<td>2.44</td>
</tr>
<tr>
<td>France</td>
<td>2.40</td>
</tr>
<tr>
<td>Portugal</td>
<td>2.35</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>2.32</td>
</tr>
<tr>
<td>Ireland</td>
<td>2.27</td>
</tr>
<tr>
<td>Sweden</td>
<td>2.25</td>
</tr>
<tr>
<td>Norway</td>
<td>2.25</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.23</td>
</tr>
<tr>
<td>Germany</td>
<td>2.22</td>
</tr>
<tr>
<td>Iceland</td>
<td>2.20</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2.19</td>
</tr>
<tr>
<td>Austria</td>
<td>2.18</td>
</tr>
<tr>
<td>Denmark</td>
<td>2.15</td>
</tr>
<tr>
<td>Croatia</td>
<td>2.12</td>
</tr>
<tr>
<td>Finland</td>
<td>2.10</td>
</tr>
<tr>
<td>Malta</td>
<td>2.05</td>
</tr>
<tr>
<td>Belgium</td>
<td>2.03</td>
</tr>
<tr>
<td>Czechia</td>
<td>1.83</td>
</tr>
<tr>
<td>Poland</td>
<td>1.82</td>
</tr>
<tr>
<td>Hungary</td>
<td>1.82</td>
</tr>
<tr>
<td>Turkey</td>
<td>1.81</td>
</tr>
<tr>
<td>Estonia</td>
<td>1.73</td>
</tr>
<tr>
<td>Slovakia</td>
<td>1.72</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>1.70</td>
</tr>
<tr>
<td>Romania</td>
<td>1.66</td>
</tr>
<tr>
<td>Russia</td>
<td>1.48</td>
</tr>
</tbody>
</table>

- 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?

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

- To experience the northern lights: 2.65
- To experience the midnight sun: 2.55
- To visit Finnish lakes: 2.42
- To visit old wooden traditional towns: 2.41
- To experience Helsinki: 2.36
- To experience autumn colors in forests: 2.36
- To reconnect with nature: 2.33
- To visit Finland’s UNESCO world heritage sites: 2.32
- To experience Finnish food culture: 2.31
- To hike in a national park: 2.28
- To visit a lighthouse island: 2.28
- To go for a husky or reindeer ride: 2.23
- To experience Swedish Sami people and culture: 2.21
- To experience authentic Finnish Sauna: 2.21
- To experience snow and arctic nature: 2.17
- To spend a night in a glass igloo accommodation: 2.16
- To meet the real Santa Claus: 1.87

Average score: 2.29
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:

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

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

**CULTURE**
- To experience Finnish architecture and design: 38%
- To visit Finland’s UNESCO world Heritage Sites: 46%
- To experience Helsinki: 48%

**NATURE**
- To experience the northern lights: 71%
- To experience the midnight sun: 63%
- To experience Finnish lakes: 52%

**FINNISH EXPERIENCES**
- To meet the real Santa Claus: 28%
- To spend a night in a glass igloo accommodation: 41%
- To go for a husky or reindeer ride: 44%

Top three most attached topics to each factor/Share of very interested respondents
Land of a thousands lakes and the cleanest air in 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?

Average score: 2.28

- Finland is the land of a thousands lakes: 2.44
- Finland has the cleanest air in the world: 2.44
- Finland has the world's largest archipelago: 2.31
- Finland is the happiest country in the world: 2.3
- Finland is a leading sustainable travel destination: 2.26
- Santa Claus comes from Finland: 1.92
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?

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

- **LOW (17%)**
  - Less than 300€ per person: 4%
  - 300€-500€: 13%

- **MID RANGE (51%)**
  - 500€-1000€: 27%
  - 1000€-1500€: 24%

- **MEDIUM HIGH (17%)**
  - 1500€-2000€: 16%

- **HIGH (17%)**
  - 2000€-2500€: 10%
  - Over 2500€ per person: 7%
Travellers with a high purchase power

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

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

Which of the following best describes your current income level?

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?

- Are typically older than average – one in four are aged over 65
- Are frequent and experienced travellers.
- Likely to travel with spouse or partner (82%).

Interest to food and culture
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

- Strongly disagree: 5%
- Somewhat disagree: 10%
- Neither agree nor disagree: 38%
- Somewhat agree: 32%
- Strongly agree: 15%

I want to make sustainable travel choices

- Strongly disagree: 5%
- Somewhat disagree: 9%
- Neither agree nor disagree: 35%
- Somewhat agree: 35%
- Strongly agree: 16%

Have you ever compensated your flight emissions?

- No: 80%
- Yes: 20%

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?

- Are typically younger than average. More than third are aged under 35
- Are active consumers that are open to adopt new things
- Likely to travel alone or with young children
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
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

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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:

- **HIGH INTEREST IN NATURE**
  - Nature lover
  - Lifestyle traveller

- **LOW INTEREST IN NATURE**
  - Culture traveller

- **RELAXING AND ENTERTAINMENT**
  - City life enthusiast
  - Wellbeing seeker
  - Sun & beach lover

- **FOOD AND CULTURE**
  - Foodie

**FINLAND’S POSITION, POTENTIAL AND SEGMENTATION**
On detailed level there are **11** different segments.
**FINLAND’S POSITION, POTENTIAL AND SEGMENTATION**

**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.

**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.

- **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.
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
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.

**Digital Fluency**

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

**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.

**Travel Frequency**

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

**Value**

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
FINLAND’S POSITION, POTENTIAL AND SEGMENTATION

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
**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).

**55%**
SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA

**47%**
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**

FINLAND'S POSITION, POTENTIAL AND SEGMENTATION
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.
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

Culture traveller
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
**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).

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

**VALUE**

**POTENTIAL FOR FINLAND**
**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.
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.”
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%

**Traveler Profile**

**Planning**

**Traveling 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).

**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

**Travel Frequency**

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

**Value**

**Potential for Finland**

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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.
INTERESTING IN FINLAND

- Natural phenomena 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

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.
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 seek 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%

**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

**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).

**SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA**
72%

**PLANNING TRAVELLING EXPERIENCE**

**DESIRE FOR NEW SUSTAINABILITY**

**VALUE**

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

**MORE OFTEN FROM GERMANY OR USA**
Germany 17% / USA 16% / Netherlands 14% / Spain 12% / France 12% / Italy 12% / UK 10% / Sweden 8%

**FINLAND’S POSITION, POTENTIAL AND SEGMENTATION**
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
Activities such as hiking, cycling, paddling or skiing in a national park
Reconnecting with nature
Experiencing the autumn colours in forests
Experiencing Finnish lakes

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

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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**: (Bar graph)
- **Travelling Experience**: (Bar graph)
- **Desire for New**: (Bar graph)
- **Sustainability**: (Bar graph)

**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.

**VALUE**

- Share experiences actively in social media 78%
- Makes plans less than 3 months ahead of time 58%

**TRAVEL FREQUENCY**

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

**POTENTIAL FOR FINLAND**

- € € € € €

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
Traveller profile for Active Hobbyist

- Often spontaneous travel decisions and not the most thorough planner. 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.
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.

- 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%

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

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).

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.
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 traveler 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 then other segments
- Segment also includes families with young children
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

Visit Finland
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.

**TRAVELLER PROFILE**

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%

**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).

**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.

**TRAVEL FREQUENCY**

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

**VALUE**

€ € € € €

**POTENTIAL FOR FINLAND**

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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.
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
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%

Travel planning

Desire for new

Sustainability

Travel planning

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.

Digital fluency

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

Planning style

Makes plans more than 3 months ahead of time

Value

Share experiences actively in social media

Travel frequency

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

Potential for Finland

Finland’s position, potential and segmentation
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
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

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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).

**SHARE EXPERIENCES ACTIVELY IN SOCIAL MEDIA**

73%

**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

**MAKES PLANS LESS THAN 3 MONTHS AHEAD OF TIME**

55%

**TRAVEL FREQUENCY**

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

**VALUE**

€ € € € €

**POTENTIAL FOR FINLAND**

FINLAND'S POSITION, POTENTIAL AND SEGMENTATION
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 then 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.
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

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

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

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

VALUE

POTENTIAL FOR FINLAND

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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.
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
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

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

Start from the segment's needs and think how well your offering meets its needs.
It seems that there are a lot relevant offering for Outdoor Explorer based on VisitFinland website.
But also Norway has very similar offering and Finland communication is not really unique
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

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.
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?

- 21% I don't know anything about it
- 20% I know a bit but I wouldn't have thought of it as a travel destination
- 51% I know Finland as a travel destination but I haven't been there
- 22% I know Finland and have visited it

FINLAND'S POSITION, POTENTIAL AND SEGMENTATION

Visit 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

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

- High interest but low awareness
- High interest and high awareness
- Low interest but high awareness
- Low interest and awareness

How well do you know Finland?
Italy, Spain and Germany have the best current interest potential.

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

- High interest but low awareness: FR, US
- High interest and high awareness: IT, ES, DE
- Low interest and awareness: NL, UK
- Low interest but high awareness: SE

How well do you know Finland?
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?

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.
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

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

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 travelling 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 segment in a positive sense.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Interested in Finland</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUTDOOR EXPLORER</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>ACTIVE HOBBYST</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>CULTURE TRAVELLER</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>LIFESTYLE TRAVELLER</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>WELLBEING SEEKER</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>CITY LIFE ENTHUSIATS</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>SUN AND BEACH LOVER</td>
<td>10%</td>
<td>1%</td>
</tr>
<tr>
<td>NATURE LOVER</td>
<td>28%</td>
<td>1%</td>
</tr>
<tr>
<td>FOODIE</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>GROUP TRAVELLER</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>LGBTQ+ TRAVELLER</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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.
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

Top of mind opinions about Finland from SE
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.
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

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

FINLAND’S POSITION, POTENTIAL AND SEGMENTATION
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.
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 examples 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
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.
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 travelling 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 artic 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

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
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

Lifestyle traveller wants to experience the authentic local lifestyle

- 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

- 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 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 nightlife 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.
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 travelling 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 artic 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.

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Visit Finland
Visit 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
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

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 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 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 travelling to Finland on vacation? ) IS (Very interested) AND (Sample) IS (NL)
Netherlands – Potential target groups for Finland

Segment shares in Netherlands

- 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

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

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<thead>
<tr>
<th>Segment</th>
<th>Germany</th>
<th>Netherlands</th>
<th>France</th>
<th>UK</th>
<th>Spain</th>
<th>USA</th>
<th>Italy</th>
<th>Sweden</th>
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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.