

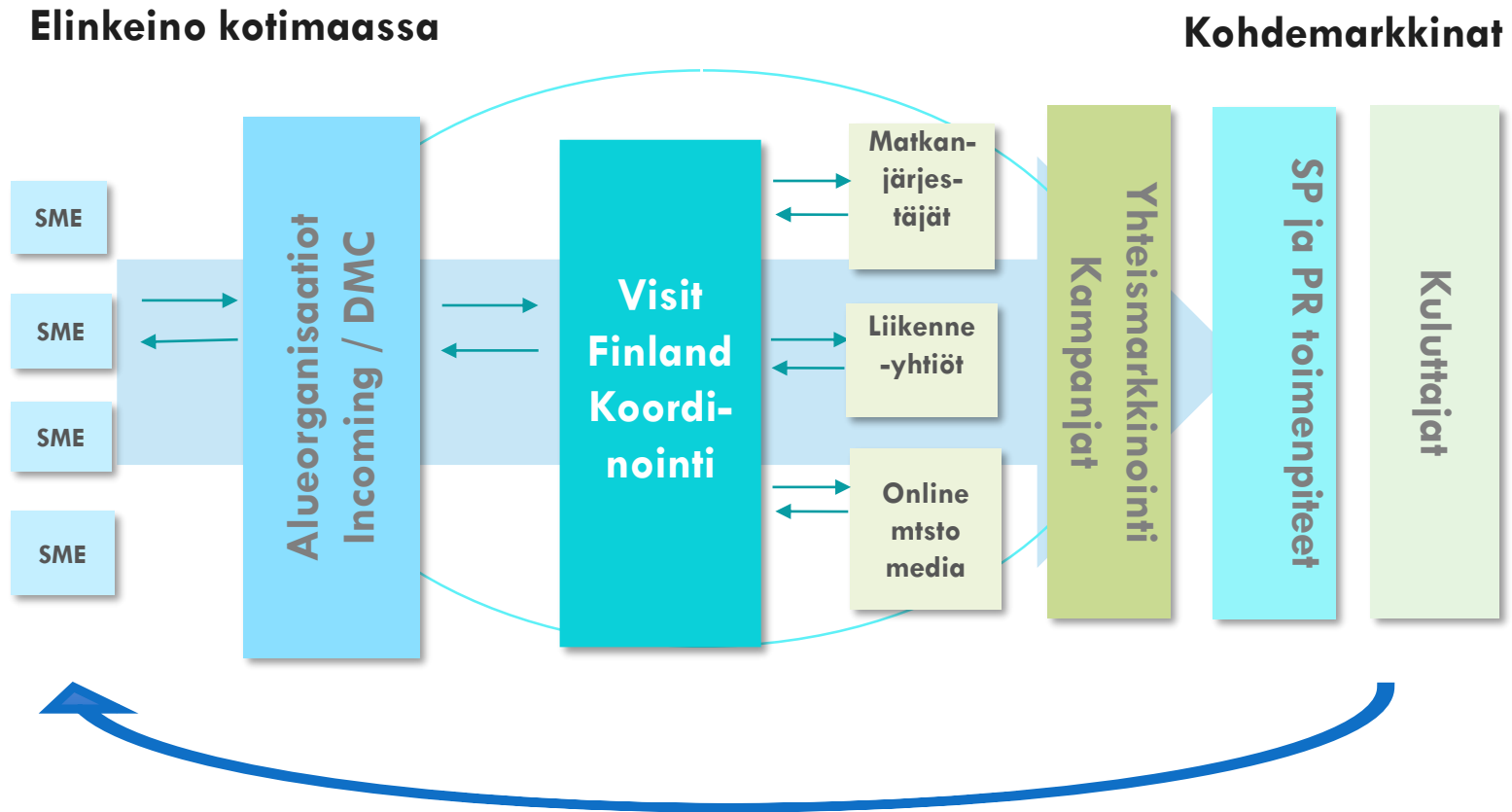


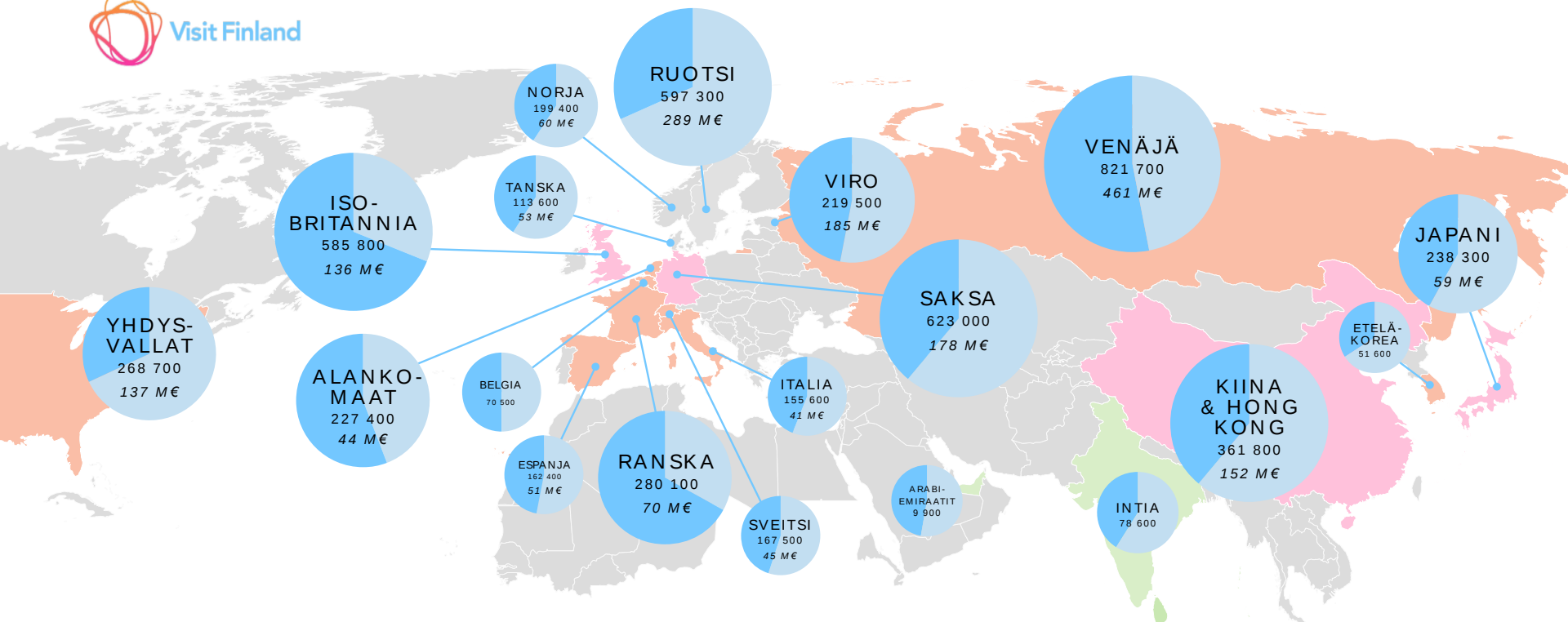
Matkailun kuusi kohderyhmää kansainvälisillä markkinoilla

Osallistu:

Slido.com
#finland

VF: Tavoitteena tukea matkailuyritysten kansainvälistymistä





VISIT FINLANDIN KOHDE-
MARKKINAT JA MUUT
SUOMEN MATKAILULLE
MERKITTÄVÄT MARKKINAT

Yöpymiset ja matkailutulot
Suomessa 2017

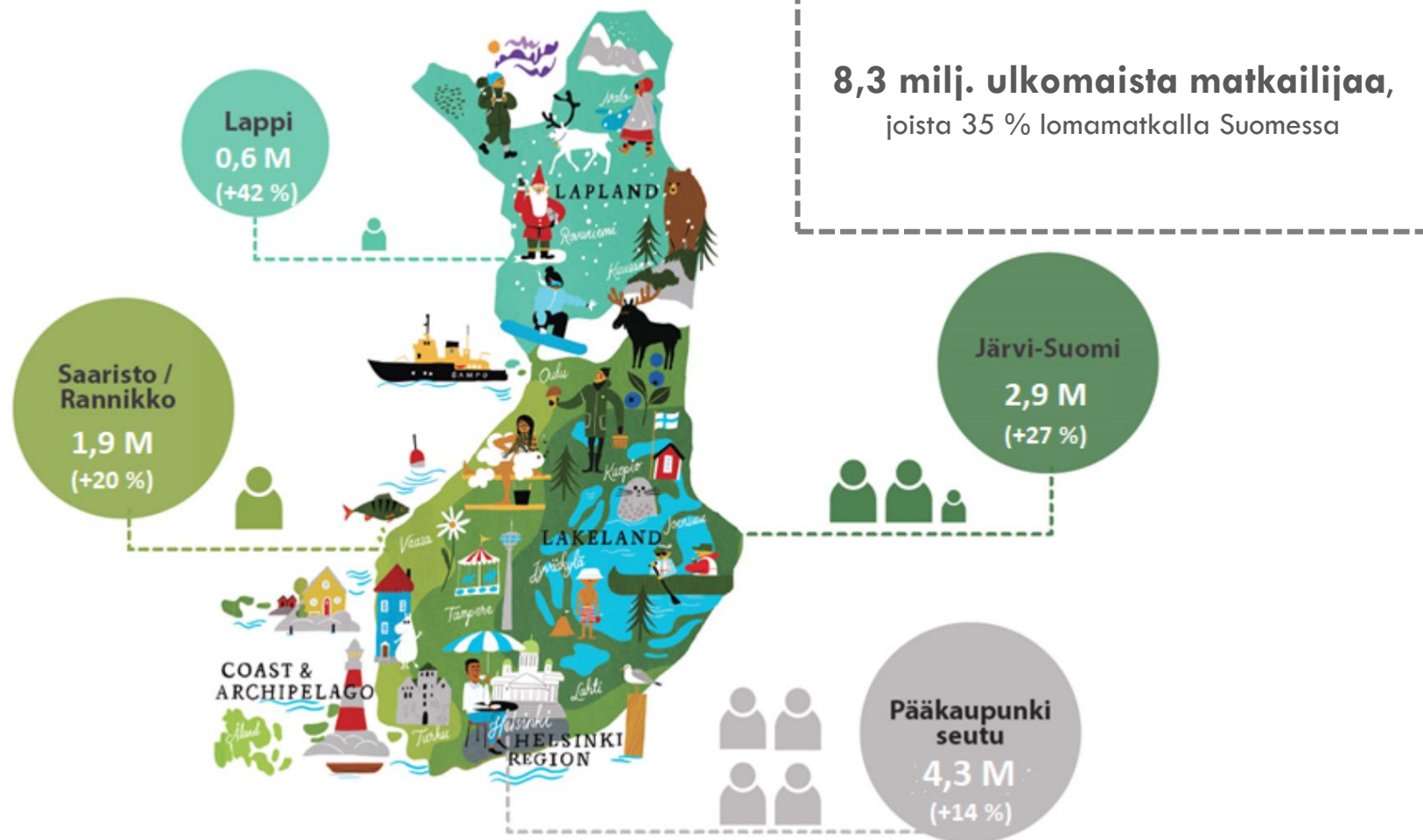
- YÖPYMISET 2017 KESÄKAUSI
- YÖPYMISET 2017 TALVIKAUSI
- PÄÄMARKKINAT
- VAKAAN KASVUN MARKKINAT
- NOPEASTI KASVAVAT & UUDET MARKKINAT

Ulkomaisia yöpymisiä 6,7 miljoonaa.
Matkailuvienti 4,0 mrd € (arvio 2017).
Kotimaisia yöpymisiä 15,2 miljoonaa.
Kotimaiset matkailutulot 10,2 mrd. € (v. 2016).

Lähteet: Tilastokeskus - Visit Finland, tilastopalvelu Rudolf

Matkailun suuralueet

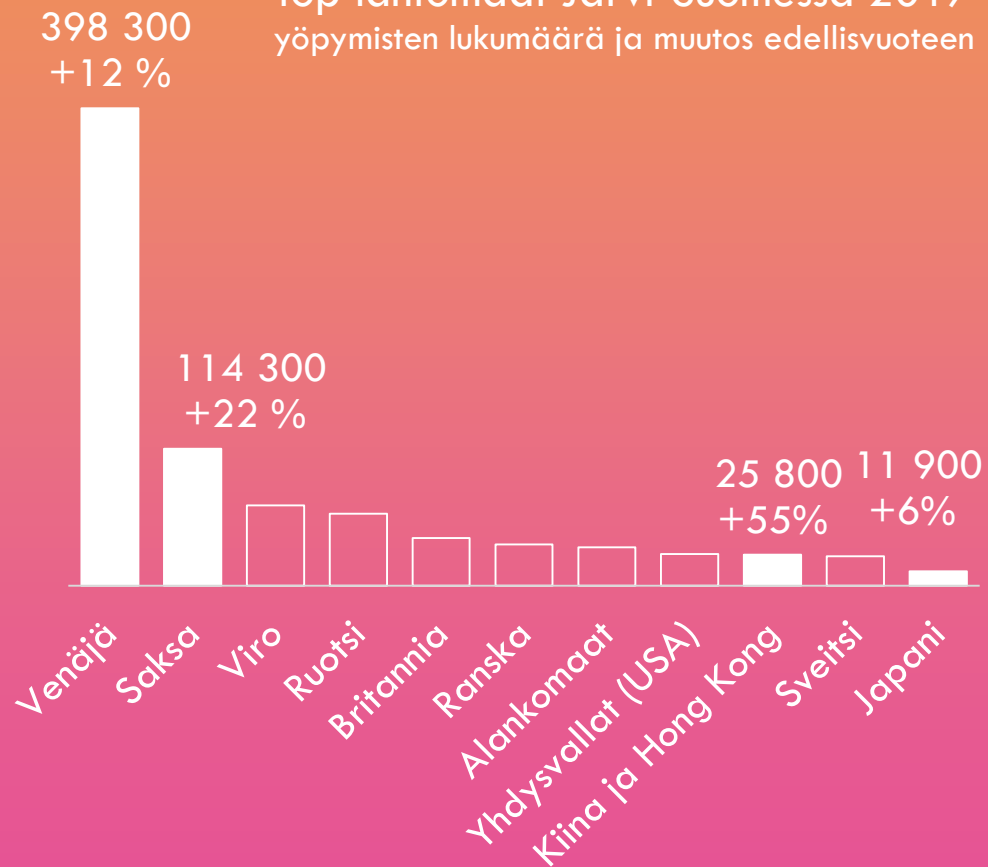
ja niiden matkailijamäärät



Lähde: Visit Finland Matkailijatutkimus 2017

Lakeland kohdemarkkinat Kiina, Saksa, Venäjä, Japani

Top lähtömaat Järvi-Suomessa 2017
yöpymisten lukumäärä ja muutos edellisvuoteen



Visit Finland

Mikä Suomessa kiinnostaa ja mitä matkailijat harrastivat

Yöpyneistä matkailijoista

56 % kertoi
harrastaneensa
kesäaktiviteetteja

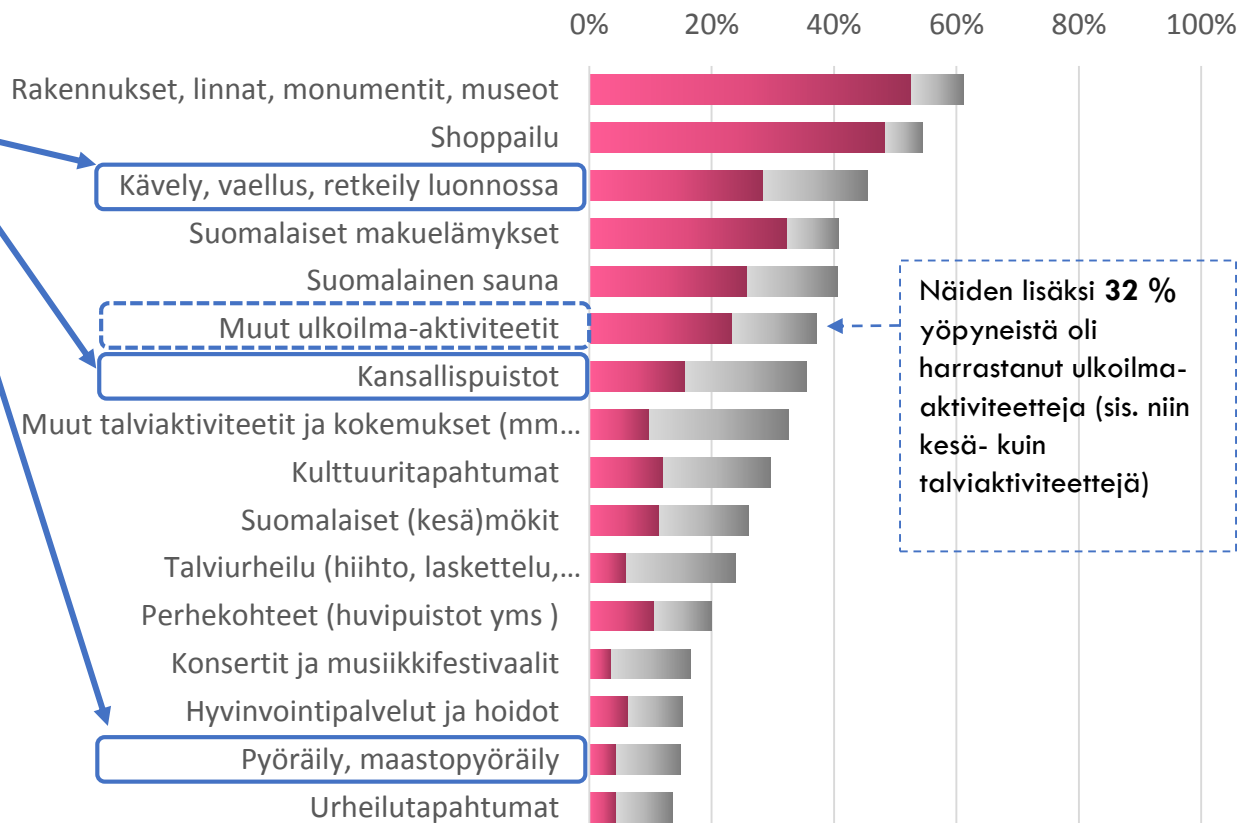
**Vuoden 2014 yöpyneistä
matkailijoista seuraavista
kesäaktiviteetteista harrasti 25
%**

- Patikointi, vaellus,
luonnonpuistot
- Vesiaktiviteetit (melonta, soutu,
purjehdus, uinti...)
- Pyöräily
- Kalastus
- Eläinten tarkkailu ja
-valokuvaus

Lomamatkailijat

■ Harrasti

■ kiinnostaisi

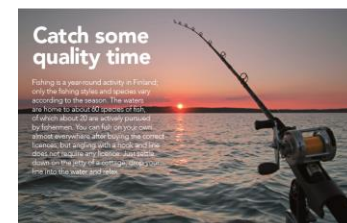
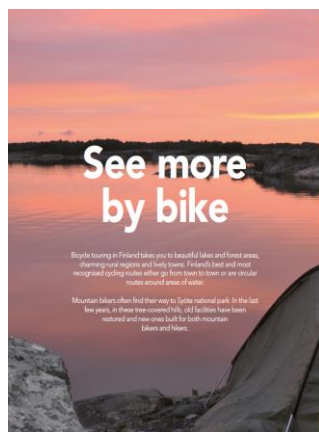


Outdoors Finland

- (Kesä)aktiviteetit yksi Visit Finlandin tuotekehityksen teemoista
- Aktiviteettituotteet sopivat osaksi monentyyppistä lomailua ja eri ikäisille

Kesäaktiviteetit

Outdoors Finland combines the strategic points of activity travel in the summer – pure nature, national parks and various activities



WALKING,
HIKING,
TREKKING

CYCLING,
MOUNTAINBIKING

KAYAKKING,
CANOEING

WILDLIFE

FISHING

EQUESTRIAN
TOURISM

Vaellusratsastus & kevyet
aktiviteetit osana muita
matkailupalveluita

Motive based segmentation to optimize marketing activities

Research conducted for Visit Finland by Nepa

Situation based segmentation will answer the following...

What should we communicate (Content)?

To whom should we communicate (Target groups)?

Where should we communicate (Channel choice)?

When should we communicate (Timing for travel and decision)?



Method of the segmentation project

Conducted in four countries:



London and
Manchester area



Berlin, Bavaria and
Nordhein-Westfalen area



Tokyo and
Osaka area



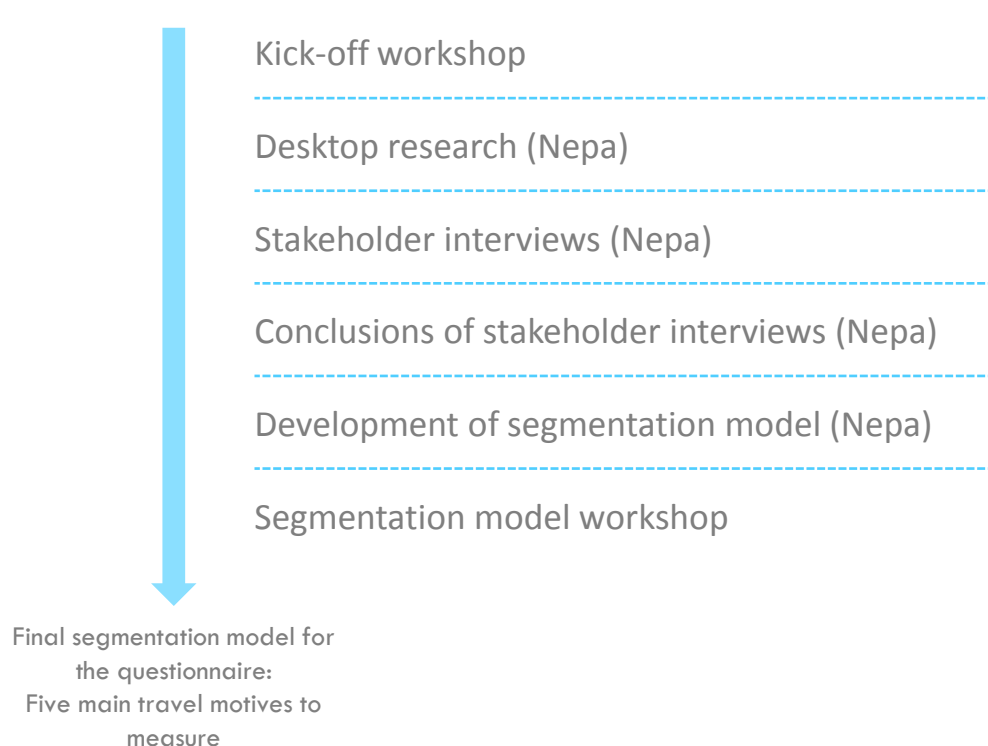
Nationally
representative



Online interviews
Data collection in
July-August 2017
1000 IP per market



Qualitative study conducted first



The process of the segmentation solution

Analysis conducted in the process of formatting the segmentation solution included the following

- ✓ Frequency analysis
- ✓ Country differences
- ✓ Correlation analysis
- ✓ Factor analysis
- ✓ MDS (multidimensional scaling)
- ✓ Overlap calculations
- ✓ Drivers analysis (maxdiff)



Based on these analysis we have estimated the optimal solution for the segmentation

With risk of being cheesy...

Focus 1

Think globally,



Unified reasons in focus

Focus 2

act locally



Local adaption of communication



Visit Finland

Based on analysis six main segments were identified



**Nature Wonder
Hunters**

**Luonnon ihmeiden
metsästäjät**



**Nature
Explorers**

**Luonto-
nautiskelijat**



**Activity
Enthusiasts**

**Aktiiviset
seikkailijat**



"Comfort Seekers"

**"Suomalainen
luksus"**



**City
Breakers**

**City-
breikkaajat**

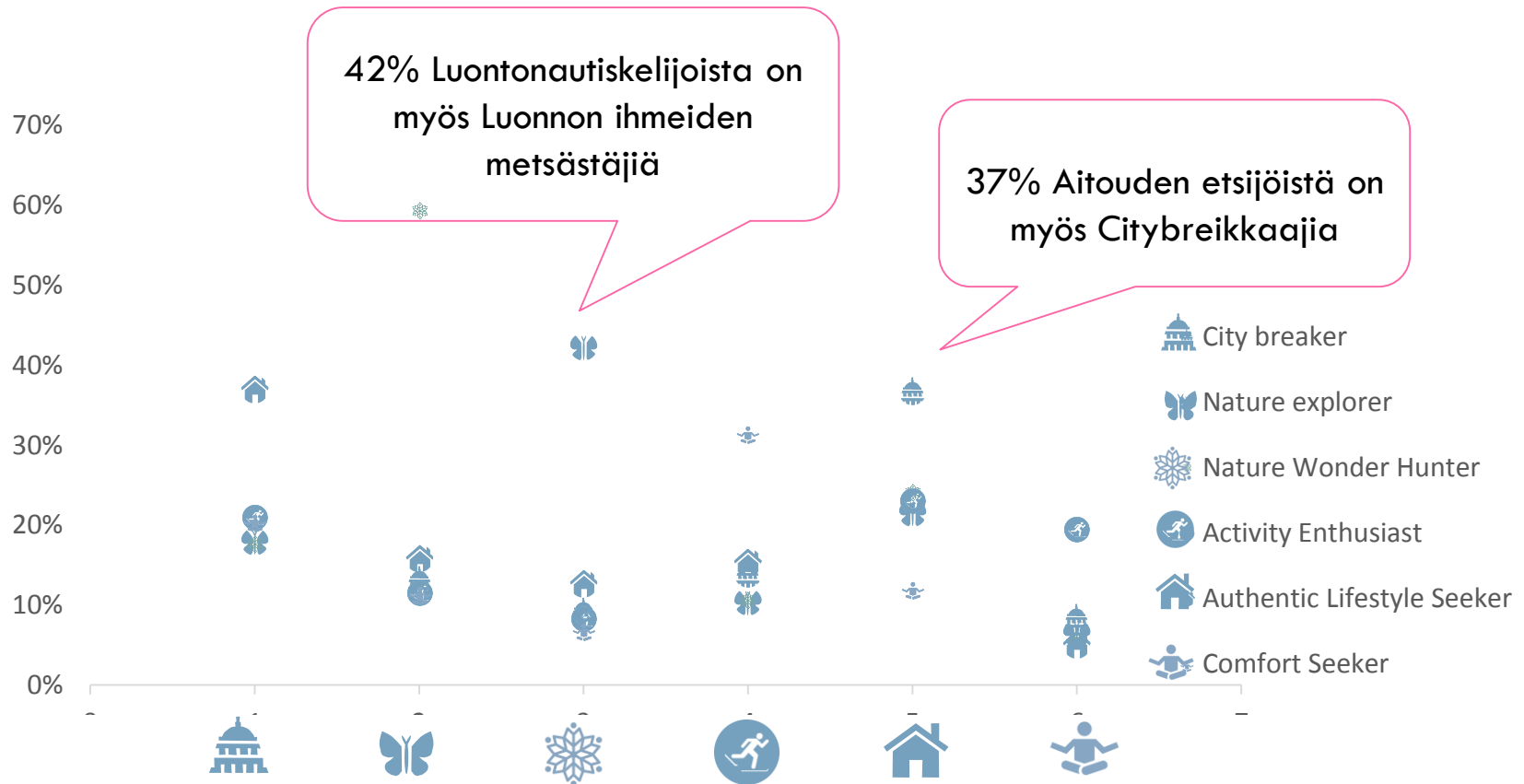


**Authentic Lifestyle
Seekers**

**Aitouden
etsijät**

Example of segmentation overlap

The higher the icon is in the graph the higher the overlap between segments



Q: Which are the most likely motives for you to make a leisure trip to Europe?

Base: 154-381 IP

Introduction to segments

Luontoelämykset

 City-breikkaajat Gender distribution quite even, older age distribution. Does more weekend trips than other segments. Important when travelling Safety, but also history and buildings/sights drive travelling for segment. Top interests include • Historic attractions • Cultural places and design districts • Culinary experiences	 Luonto-nautiskelijat More men than women, consumers from all age groups. Important when travelling Safety as well as peacefulness and quietness of the destination. Top interests include • Natural parks and forests • Northern lights • Enjoying surrounding nature	 Luonnon ihmeiden metsästäjät In UK and Germany more female than male, in China and Japan more male than female. Older than other segments. Important when travelling Safety and peacefulness. For Chinese and Japanese the destination needs to be also exotic. Top interests include • Northern lights • Natural parks and forests • Midnight sun and white nights	 Aktiiviset seikkailijat Both male and female, young segment. Travels more with family than other segments. Important when travelling Most important drivers for travelling are destination being safe and secure, also peacefulness valued. Food is also an important aspect. Top interests include • Experiencing winter • Skiing • Hiking	 Aitousen etsijät Somewhat older segment, gender distribution dependent on country. Important when travelling Authentic Lifestyle Seekers value an opportunity to get to know a new culture or way of life. Culinary culture and safety also important. Top interests include • Experiencing local lifestyle • Museums displaying local culture • Local events	 “Suomalainen luksus” Younger segment, more male than female travellers. Important when travelling Safety and culinary experiences. Also important that the destination is genuine and idyllic. Top interests include • Special accommodation • Husky/reindeer ride • Wellbeing treatment
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Turvallisuus

Turvallisuus, rauha

Aitous

Kaupunkikulttuuri

Kiireettömyys,
vaivattomuus

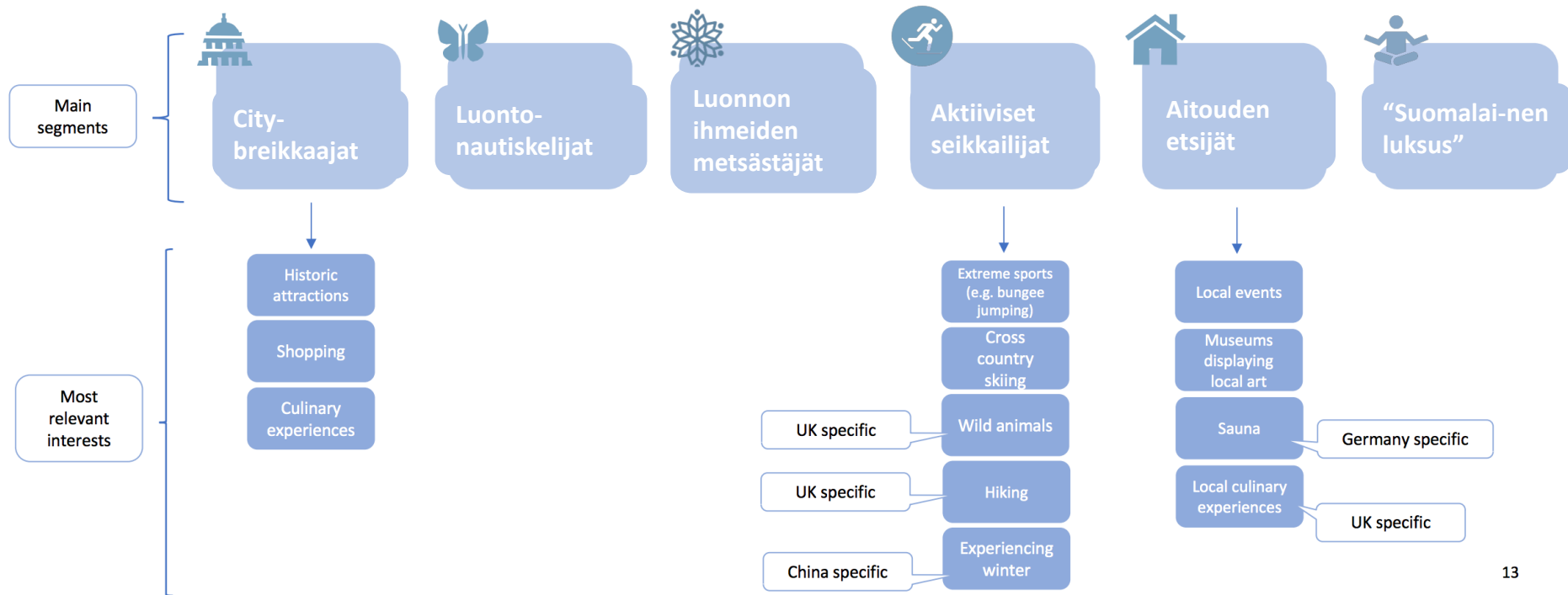
Eksotiikka,
Once in a lifetime –
elämykset

Aktiviteetit,
palvelut
saatavilla

Like a local

Korkea
laatu ja
palvelun
taso

Overview of situational segments and most relevant interests



13

Source: Visit Finland Segmentation Study 2017

Which segments should we focus on?

Size / Value:

The segment needs to be large enough

Current image:

Finland's strengths today needs to
be taken into consideration

Desired image:

The desired position of Finland

Segment sizes

						
	City-breikkaajat	Luonto-nautiskelijat	Luonnon ihmeiden metsästäjät	Aktiiviset seikkailijat	Aitouden etsijät	“Suomalainen luksus”
UK	22%	17%	12%	12%	23%	15%
Germany	23%	17%	12%	15%	23%	9%
Japan	22%	14%	8%	18%	20%	18%
China	21%	16%	10%	10%	21%	22%
Average	22%	16%	12%	14%	22%	16%

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months

Spontaneous
associations with
Finland

Country summary Germany : Image of Finland

cold Helsinki
beautiful northern
snow sauna Nature fjords
ice people lakes reindeer
forests

Spontaneous
associations with
Finland

Country summary Japan

:

Image of Finland



Spontaneous
associations with
Finland

Country summary China : Image of Finland

lights
helsinki
country
island
snow
lake
aurora
cold
ice
thousand
beautiful
finnish
nokia
claus
northern



Visit Finland

Spontaneous
associations with
Finland

Country summary UK

:

Image of Finland



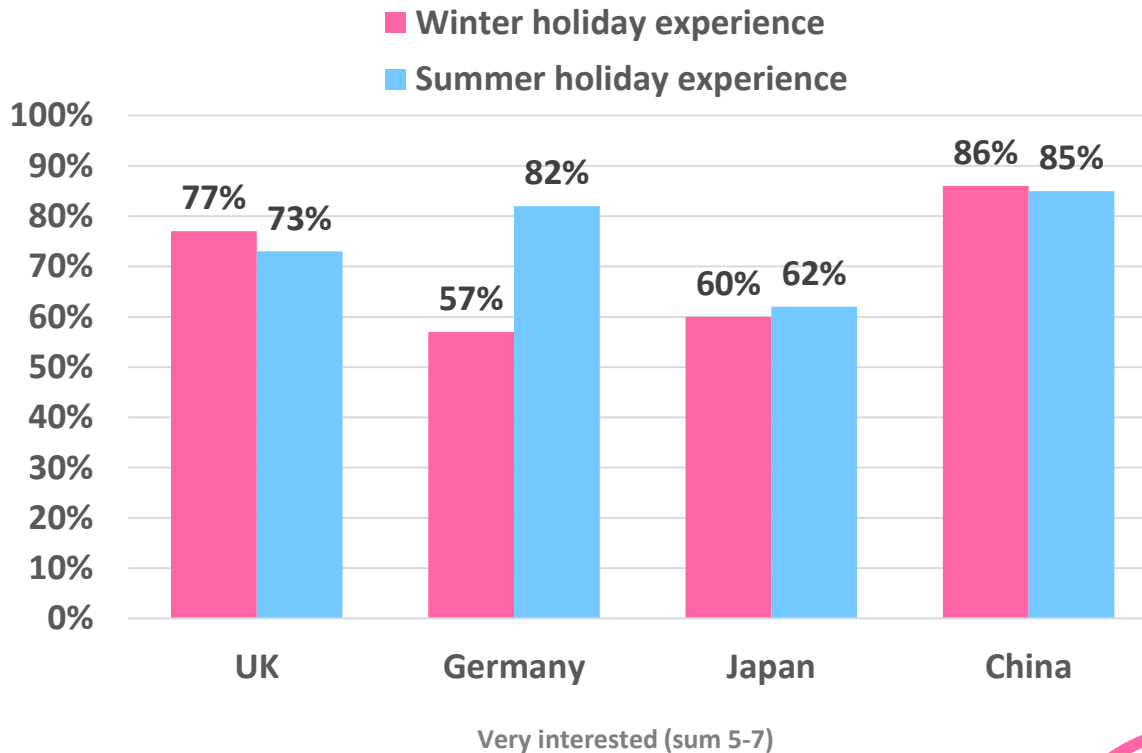
Visit Finland

Winter and cold are the main motives for travelling to Finland?



Q: What is the first thing you think about when you think about Finland?

NO! Summer is equally interesting once people get informed



Summer holiday experience



Winter holiday experience



All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 monthsc

Q: How interested would you be in making the following kind of trip?

What's unique for Finland compared to other countries

Activities associated with Finland –
Points of difference (POD) vs other countries



**Experiencing
Northern lights**



**Experiencing
Local nature**



**Experiencing
Natural Forest**



**Experiencing
Lakes**

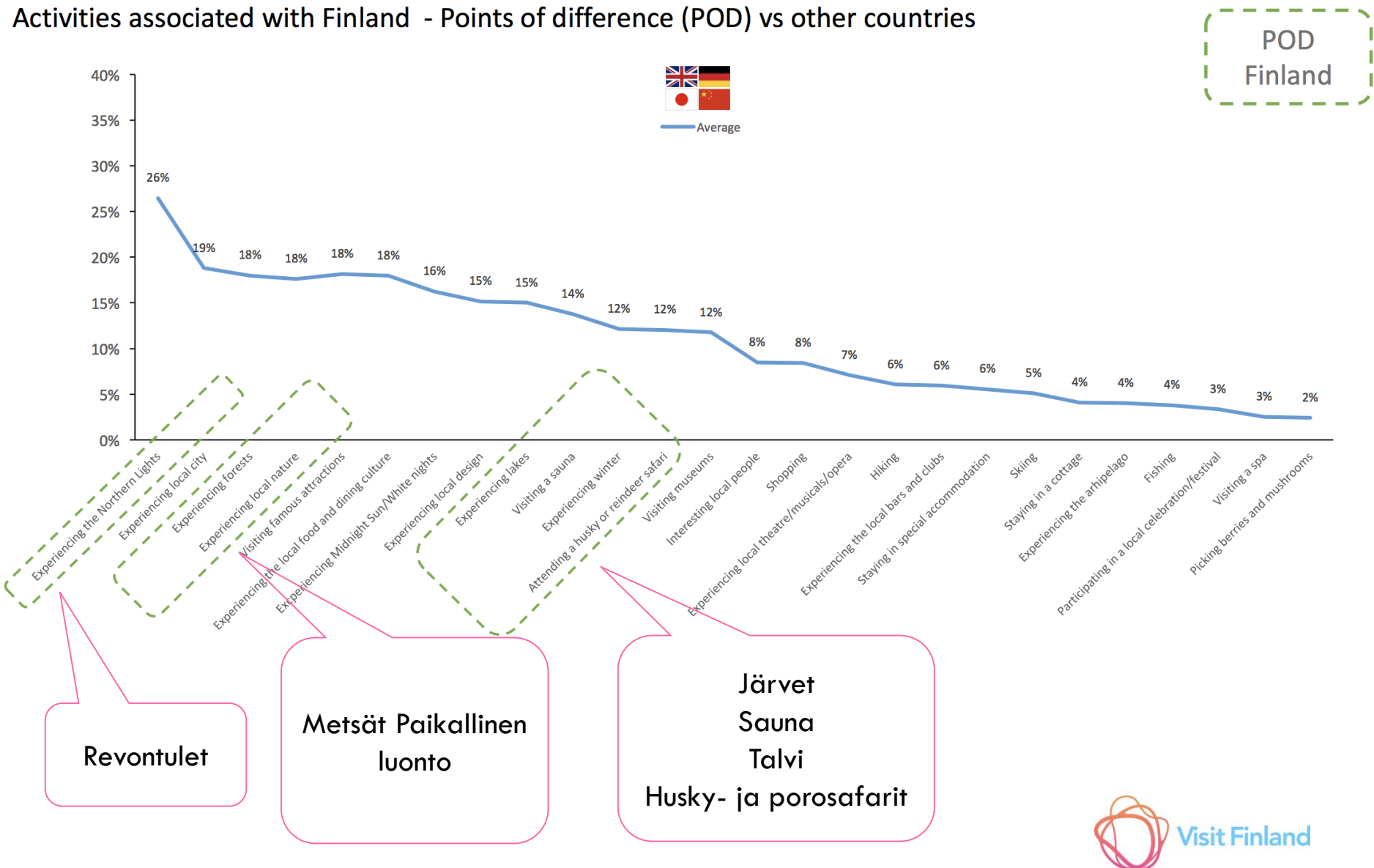


**Experiencing
Winter**

**POD
Finland**

Compared to other travel destinations Finland stands out when it comes to Northern Lights and Nature as well as Winter experiences in general

Activities associated with Finland - Points of difference (POD) vs other countries



Uniqueness gives Finland the possibility to win within several segments interested in different types of nature experiences



High interest in segment

POD Finland	City-breikkaajat	Luonto-nautiskelijat	Luonnon ihmeiden metsästäjät	Aktiiviset seikkailijat	Aitouden etsijät	"Suomalainen luksus"
✓ Experiencing Northern lights						
✓ Experiencing Local nature						
✓ Experiencing Natural Forest						
✓ Experiencing Lakes						
✓ Experiencing Winter						

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months



Core segments

Luonnon
ihmeiden
metsästäjät

Luonto-
nautiskelijat

Aktiiviset
seikkailijat

Main focus
due to Finland
being strong
on nature

Supporting segments

Aitouden etsijät

“Suomalainen
luksus”

City-breikkaajat

1

2



Visit Finland



Visit Finland



Nature Wonder Hunters: Luonnonihmeiden metsästäjät

Why does the segment travel?

Unique nature Experience

Interests

Northern lights
Midnight sun

Story behind the segment name

Wants to achieve special experiences during holiday.

Important to see wonders of the nature and capture as well as share them.

Schedule of the trip can be tight, wants to see everything that has been planned.

Once in a lifetime attitude separates from Nature explorer, also older than them



Visit Finland



Activity Enthusiasts: **Aktiiviset seikkailijat**



Why does the segment travel?

**Active
holiday
in nature**

Interests

Extreme sports

Skiing

Winter

Arctic nature

Animals

Water/snow activities

Story behind the segment name

Wants to be active during holiday and this gives great mood and energy to these travellers.

Enthusiastic to try new and unique/special sports.

Also important to experience beautiful scenery through activities.



Visit Finland



Nature Explorers : Luontonautiskelijat



Why does the segment travel?

Peaceful
nature
Rewinding

Interests

Natural parks
Forests
Lakes
Genuine nature
Northern lights
Midnight sun
Retrites
Berries, mushrooms

Story behind the segment name

Wants to rewind in nature and enjoy the peace and beautiful scenery.

Slow life, no rush.

Enjoying the purity of nature to get balance in hectic everyday life.



Visit Finland



Luontonautiskelijat

Mitä matalan kynnyksen
hevosmatkailutuotteita tälle
segmentille voisi kehittää?

Slido.com
#finland

<https://wall2.sli.do/event/xuxn3pg0>

Ruoka
Luontomerkitys
Kiireettömyys
Sienestys, marjastus
Aitous, paikallinen elämänmeno
Kuvataide ja saaret
Omatoiminen
Luontoelämys helposti saatavil
Konsertit luonnossa
Lähipalvelut saatavilla
Kokkauskurssit luonnossa
Kansallispuistojen tarjonta
Luonnon kulttuuri ja tarinat
Esteettömät palvelut
Palveluita saat
UNESCO-kohteet
Kasvien ja eläinten tunnistus
Omatoimiset kevyet aktiviteetit
Puhtaus, aitous
Lintubongaus
Helpot luontoelämykset
Camping
Rauha & hiljaisuus
Veneily, purjehdus, melonta
Mökkituote, live like a local
Kävely, kevyt vaellus
Hiljaisuus, luonnon äänet
Yhdessä olemista
Jokamiehen oikeudet
Paikallinen kulttuuri & ruoka
Vaellusretket
Palvelut ja mukavuudet
Mindfulness, retriitti
Pyöräily
Vaivattomuus, kiireettömyys
Karhut ym. villieläimet, hylje

Terveys



Visit Finland

Comfort Seekers: Suomalainen luksus



Why does the segment travel?

Interests

Story behind the segment name

Wellbeing
Time for myself

Well-being services

Special

accommodation

Spas

Husky/reindeer

Light sport activities

nature

Wants to feel good emotionally and physically (body&soul).

Ready to invest more in expensive and special accommodation and activities.



Visit Finland



Authentic Lifestyle Seekers: Aitouden etsijät



Why does the segment travel?

Getting to know local lifestyle

Interests

Local museums and events, festivals, concerts
Local life
Nature
Sauna
Food culture
Culture destinations
Design districts
Special accommodation

Story behind the segment name

Wants to blend in with the locals and avoid places with lots of tourists.

Important to achieve feeling of what it would be like to live in the country.

Versatile experience of lifestyle of the country.



Visit Finland

City Breakers : Citybreikkaajat



Why does the segment travel?

City experience
Sightseeing

Interests

City culture
Museums
Design districts
General city experience
Food culture
Local events
Shopping

Story behind the segment name

Wishes to see and explore the specialities of a city, areas where there's interesting experiences to see and do.

Stories and history of the city important.

Desire to experience the lifestyle of the city but clearly from a travellers perspective.



Visit Finland

What data has been analysed on country level?



UK: Nature Wonder Hunters



■ Nature wonder hunter ■ Total



Base: Segment 188 IP, Total 1000 IP

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months

Next steps

- USP:t ohjaavat tuotesisältöjä ja tuotteita
- Hyödynnetään ohjelmien / projektien tuotekehityksessä,
tuotteistamisessa
ja sisältöjen luomisessa

Next steps

- Kohderyhmäopas elinkeinon käyttöön
- Visit Finland Akatemian valmennuskokonaisuus

Slido.com
#finland

<https://wall2.sli.do/event/xuxn3pg0>

BUSINESS FINLAND JA VISIT FINLAND - ARVOT



INNOLLA
WITH PASSION
#showyourpassion



ISOSTI
THINK BIG
#setbenchmark



YHDESSÄ
ALL TOGETHER
#beinclusive



SISULLA
WITH SISU
#actionsmatter

Visit Finlandin matkailuyrittäjän kansainvälistymiskriteerit ja kansainvälistymisopas:

http://www.visitfinland.fi/wp-content/uploads/2015/04/VisitFinland_Kansainv%C3%A4listymiskriteerit.pdf?dl

http://www.visitfinland.fi/wp-content/uploads/2014/09/2014-MEK_Kansainvalistymisopas.pdf?dl

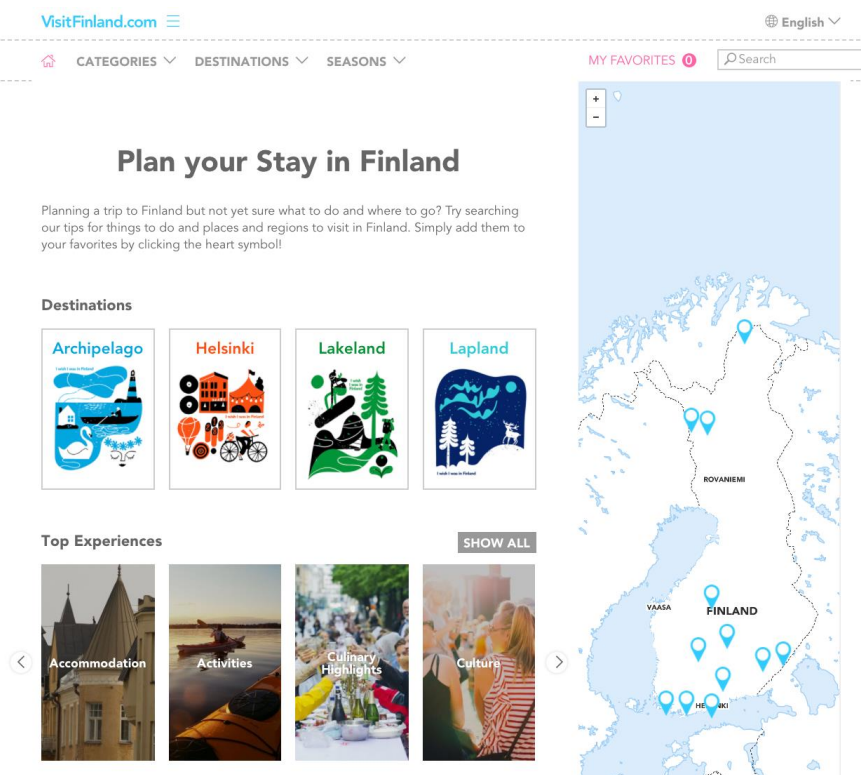
Perustietoa tuotteistuksesta, Ourdoors Finland tuotesuosituksset:

<http://www.visitfinland.fi/tuoteteemat-ja-tyokalut/tuoteteemat/kesaaktiviteetit-outdoors-finland/tuotesuosituksset/>

My Stay –tuoteportaali

Esittelee Suomen kansainvälisille yksittäismatkailijoille suunnattuja palveluja

- Visit Finlandin taktinen työkalu
- Ilmainen palvelu yrityksille kunhan täyttää kriteerit
- Yli 3 000 kotimaista matkailualan palvelua ja tuotetta
- Jaottelu alueittain, kategorioittain, vuodenajoittain ja top picks
- Yli miljoona vierailua/vuosi, n. 2 minuutin viipymä, yli 600 000 katsottua tuotekorttia, yli 140 000 klikkausta yritysten sivuille
- Lähes puolet kävijöistä on päättänyt tulla Suomeen eli hyvin potentiaalista yleisöä



My Stay –tuoteportaali

Esimerkki hevosmatkailutuotteesta



Horse Riding Safari in Lapland and Pöyrisjärvi

 SUMMER / AUTUMN

Welcome to enjoy an unforgettable horse riding safari in the wilderness of Lappish fells! This riding safari takes you along sandy roads, through wild forests, by lakes and over hills and fells. A real playground for horses and riders!

 VISIT WEBSITE

CATEGORIES

Activities, Horseback Riding, Outdoors Finland

CONTACT

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99130 Sirkka
☎ +358 40 413 9248
✉ info@polarrightstours.fi

MyStay tuotekriteerit:

<http://www.visitfinland.fi/wp-content/uploads/2018/04/My-Stay-ABC-1.pdf?dl>

Lisätietoa kohderyhmistä:

Visit Finland Segmentation Study 2017

www.visitfinland.fi/studies/visit-finland-segmentation-study-2017/



KIITOS!



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