Italy
Regional Pack
(Lombardy, Veneto and Lazio)
In 2017 the outbound trips for Italians increased: they travel more (+2.4% vs. 2016), spend more nights away (+3.6% vs. 2016), and have higher expenditure (+9.7% vs. 2016).

There is a great potential to increase arrivals during the summer, as this is the peak travel season for Italians.

There is also a growing interest/trend toward Northern countries, with cold being seen as the new hot.

By 2020 online bookings for tours and attractions will double ($9 billion to $21 billion). Most of them will be optimized for mobile devices.
Where do we rank in visitors minds?
When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland does not stand out from its Nordic competitors – ranked #3 in the region.

**Spontaneous Destination Consideration**

Q2. SPONTANEOUS CONSIDERATION DESTINATION

Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries.
A similar picture when prompted, though encouragingly consideration for Finland has grown in rank since 2015.

### Total Consideration

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank '19</th>
<th>Rank change vs '15*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>#7</td>
<td>+4</td>
</tr>
<tr>
<td>Sweden</td>
<td>#6</td>
<td>=</td>
</tr>
<tr>
<td>Norway</td>
<td>#8</td>
<td>-2</td>
</tr>
<tr>
<td>Denmark</td>
<td>#3</td>
<td>+2</td>
</tr>
<tr>
<td>Iceland</td>
<td>#9</td>
<td>-2</td>
</tr>
</tbody>
</table>

*Rank change vs '15* due to different methodology and consideration set used.

**Q7. PROMPTED CONSIDERATION DESTINATION**

Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

- Finland: 51% (Rank #7, change +4)
- Sweden: 53% (Rank #6)
- Norway: 60% (Rank #3, change +2)
- Denmark: 50% (Rank #9, change -2)
- Iceland: 50% (Rank #8, change -2)
Claimed visitation to the Nordic region as a whole is low in Italy. Sweden and Denmark see the best conversion to visits.

**Consideration to P3Y visit funnel**

- **Finland**
  - Consideration: 51
  - Ever Visited: 11
  - Visited last 3 years: 4

- **Sweden**
  - Consideration: 53
  - Ever Visited: 19
  - Visited last 3 years: 6

- **Denmark**
  - Consideration: 50
  - Ever Visited: 18
  - Visited last 3 years: 6

- **Norway**
  - Consideration: 60
  - Ever Visited: 14
  - Visited last 3 years: 4

- **Iceland**
  - Consideration: 50
  - Ever Visited: 6
  - Visited last 3 years: 4

Base: Total Sample (1,000)
Demographically, there is little differentiation amongst age groups for those claimed to have visited Finland. The older target are somewhat less likely to consider Finland as a holiday destination.

**Age Profile**

Demographically, there is little differentiation amongst age groups for those claimed to have visited Finland. The older target are somewhat less likely to consider Finland as a holiday destination.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Consideration Destination</th>
<th>Ever Visited</th>
<th>Visited last 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>51%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>25-34</td>
<td>52%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>35-44</td>
<td>55%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>45-54</td>
<td>54%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>55-65</td>
<td>51%</td>
<td>13%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Sig diff at 95% vs Total Sample

Base: Total Sample (1,000)
There is little variation between the different Italian regions

**Regional Differentiation**

- Consideration Destination: Total (51%), Lombardi (50%), Veneto (56%), Lazio (48%)
- Ever Visited: Total (11%), Lombardi (11%), Veneto (10%), Lazio (12%)
- Visited last 3 years: Total (4%), Lombardi (3%), Veneto (4%), Lazio (5%)

Base: Total Sample (1,000)
Key barrier to visit Finland as well as its Nordic neighbours lie around perceptions as only being for people that like to be outside a lot

**Q14 BARRIERS**

Please now consider the following statements. Do you associate any of these holiday destinations with these statements?

### Barriers to visit

<table>
<thead>
<tr>
<th>Nationality</th>
<th>It’s too expensive</th>
<th>It is only for people who like to be outside a lot</th>
<th>It’s too inaccessible/hard to reach</th>
<th>There is nothing much to do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iceland</td>
<td>43%</td>
<td>74%</td>
<td>34%</td>
<td>10%</td>
</tr>
<tr>
<td>Norway</td>
<td>40%</td>
<td>68%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Sweden</td>
<td>35%</td>
<td>68%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Finland</td>
<td>33%</td>
<td>64%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Denmark</td>
<td>30%</td>
<td>54%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>
The lower consideration of Finland as a holiday destination is likely linked to a lack of knowledge – consideration to visit is greater amongst those who claim to hold good knowledge.

**Destination Knowledge (T2B)**

Claimed visitation to country in the next three years based on more than a fair amount of knowledge of that country.

- **Norway**: 48%
- **Sweden**: 47%
- **Denmark**: 46%
- **Iceland**: 42%
- **Finland**: 38%

- **Norway**: 61%
- **Sweden**: 60%
- **Denmark**: 63%
- **Iceland**: 64%
- **Finland**: 57%

**Sig diff at 95% vs Finland**
What are we known for as a travel destination?
When thinking about Finland, winter and nature themes (such as fjords, lakes and northern lights) come through strongly in Italy

**Spontaneous Impressions - Finland**

- A cold country, but with magnificent scenery
- Natural landscapes, exceptional services at the highest levels
- Fjords, unspoiled nature, immense spaces and full of vegetation
- Lakes, ponds and beautiful lakes. The attention to cleanliness of the largest cities and smaller towns.
- Cold, vast wildlife, incredible views
- Finland makes me think of Santa Claus and wonderful, unspoiled places

*Visit Finland
Q9 BMN
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.*

I would like to see the northern lights, but I fear that the journey and the stay is quite expensive

Santa’s reindeer, tundra. I think that from a landscape point of view it's a beautiful country

Interesting tourist destination for a healthy lifestyle, respect for the environment, not industrialized, a chance to live in uncontaminated places

Fjords, snow, cold, fresh fish, northern lights, ice, water, colourful houses

The green land, forests, at Europe's borders, and so close to Russia. A land to discover, even exotic and pristine

Cold, dark, quiet, good food, frozen lakes, nature, saunas, forests, reindeer, Christmas, summer, tranquillity.

Visit the capital, you immerse yourself in unspoilt nature and picnics, seeing the northern lights and midnight sun

Koli National Park: a sense of serenity and wonder.

Base: Consideration Set: Finland (527)
The Nordics as a region are strongly associated with their nature landscapes/features. Denmark and Sweden also see their capitals emerging strongly.

**Spontaneous Impressions – Competitors**

**Sweden**:
- Nature
- Landscape
- Stockholm
- Clean Country
- Natural
- History
- Forests
- History
- Museum
- Fjords
- Live

**Denmark**:
- Culture
- Stunning City
- Little
- Copenhagen
- Danish
- Bike
- Castle
- Climate
- Order

**Norway**:
- Fjord
- Nature
- Cruise
- Very
- City
- North
- Snow
- Lights
- Northern

**Iceland**:
- Nature
- Geyser
- Volcano
- Lights
- Volcano

Base: Consideration Set: Sweden (496), Denmark (468), Norway (550), Iceland (453)

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Imagery perceptions of Finland does not stand out much from its Nordic neighbours with perceptions very similar to those for Norway. Sweden and Denmark lead on some cultural perceptions.
A slightly stronger performance in terms of nature perceptions, particularly in terms of the lakes where Finland see a clear lead in Italy.
There is room to grow Finland’s association with sustainable tourism amongst the Italian population.

**Image - It is known for providing/promoting sustainable tourism**

- **Sweden**: 44%
- **Iceland**: 41%
- **Norway**: 41%
- **Finland**: 39%
- **Denmark**: 38%

**Q13 IMAGE ASSOCIATIONS**

Do you associate any of these holiday destinations with the following statements?

- **Have a great deal of knowledge about Finland**: 33%, 40%, 35%, 43%, 43%, 40%, 39%, 38%, 32%

**Sig diff at 95% vs Total Sample**
Perceptions of a sustainable travel destination is focused on sustainable, low polluting transport means to reduce carbon footprint and tourism not having a negative impact on the environment.

**Sustainable travel destination - OEs**

Using environmentally friendly vehicles, immersion in the local culture with consumption of local foods

Tourism in harmony with the environment and local cultures.

A place where travel is easy by public transport, it is possible to have a low impact lifestyle

Which combines the interests of the tourist and the places you visit without a negative impact.

Accessible and visited with green transport

A holiday where you do not use polluting means of transport, such as airplanes

The traveller who chooses a sustainable tourist destination, and who tries to minimise their environmental impact by choosing certain means of transport, eating local produce. Sustainable tourist destination can be a country particularly attentive to environmental issues, a country rich in green spaces, paying particular attention to its preservation.

A destination that offers tourists an ecological holiday that does not harm to the environment and its resources, including for example cycling. And which promotes local activities and crafts.

Where the tourist impact is minimal, and does not harm the land and the local population (e.g. accommodation minimal and no skyscrapers).

Place where you can rent environmentally friendly vehicles, and visit parks or nature reserves in respect of the ecosystem.

Visit Finland

Q23 SUSTAINABILITY

In your opinion, what is meant by a ‘sustainable’ travel destination?
In terms of activities and experiences associated with Finland, saunas, visiting Santa’s home, sleigh rides and sleeping in igloos have strong links in Italy.
Activities around lakes see some good links to Finland too, though closely followed by Norway. Whilst not very well known, Moomins are also correctly linked to Finland.
How are people visiting us?
The Italian population most prefer cultural holidays, city breaks and holidays involving multiple cities within a country when they travel abroad.
Work should be done to promote Finnish city breaks, especially focused around visiting cultural attractions, as Sweden and Denmark currently hold an advantage here.
Whilst Finland hold good advantages in terms of festive holidays, outdoor winter holidays and relaxation/spa these are not the most sought after holiday with the Italian population.
The majority of people in Italy who are considering visiting the Nordic countries plan and make the bookings themselves.

**Trip Arranging**

- **Myself**: 48%
- **Tour operator**: 17%
- **Ready-made package**: 13%
- **Mix - myself and tour operator**: 21%
- **Other**: 1%

**Book trip myself**

- **Denmark**: 58%
- **Sweden**: 52%
- **Norway**: 46%
- **Iceland**: 41%

Base: Consideration Set: Finland (527), Sweden (496), Denmark (468), Norway (550), Iceland (453)
Over two-thirds of Italians travel with their spouse or partner

**Travel Companion**

<table>
<thead>
<tr>
<th>Travel Companion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>With spouse / partner</td>
<td>68%</td>
</tr>
<tr>
<td>With adult family aged 17+ (e.g. parent, sister)</td>
<td>23%</td>
</tr>
<tr>
<td>With adult friend(s) aged 17+</td>
<td>22%</td>
</tr>
<tr>
<td>With young family aged 16 or under (e.g. children, grandchildren)</td>
<td>21%</td>
</tr>
<tr>
<td>No-one, I travel alone</td>
<td>6%</td>
</tr>
<tr>
<td>With a school, college or study group</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,000)
• Consideration of Finland as a holiday destination in Italy has improved since 2015, ranking it in the middle of our Nordic neighbours, with half of the Italian population considering it.

• Knowledge of Finland in Italy is however the lowest of all the Nordics, translating into a low conversion of considerers to visitors. Amongst those with more than a fair amount of knowledge about Finland as a tourist destination, likelihood to visit in the next three years is greater - highlighting the importance and opportunities of growing knowledge in the Italian market.

• There isn’t much differentiation in terms of perceptions of Finland and the Nordic region as a whole but Finland does stand out in terms of its beautiful lakes. Promoting the Lakeland and raising awareness of it as a tourist destination could help differentiate Finland from its Nordic neighbours and increase the gap to Norway on association to activities related to the lakes.

• Finland is currently seen as mainly a winter destination. Pushing Finland further as an all year around destination could help capitalise on the peak travel season in Italy (summer) as well as serve as an aid in further differentiation from the rest of the Nordic region.

• As a market, Italian travellers are particularly keen on cultural holidays and city breaks. There is an opportunity to push and promote Helsinki, Tampere and Turku and their cultural attractions to better attract these type of travellers.

Summary and Final Thoughts.