



Visit Finland

Italy

Regional Pack
(Lombardy, Veneto and
Lazio)



Italy Market Context

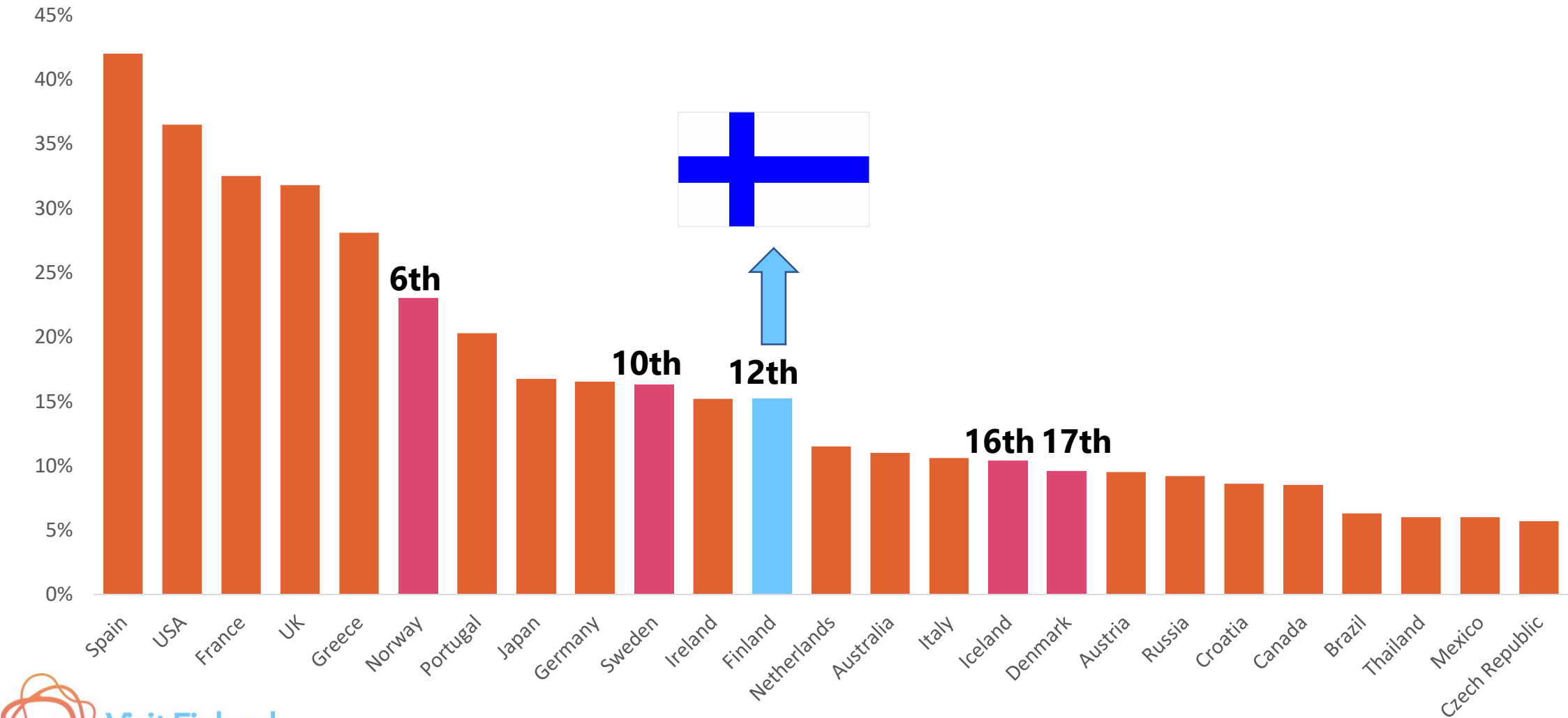
- In 2017 the outbound trips for Italians increased: they **travel more** (+2.4% vs. 2016), **spend more nights away** (+3.6% vs. 2016), and have **higher expenditure** (+9.7% vs. 2016).
- There is a great **potential to increase arrivals during the summer**, as this is the peak travel season for Italians.
- 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



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Q2. SPONTANEOUS CONSIDERATION DESTINATION

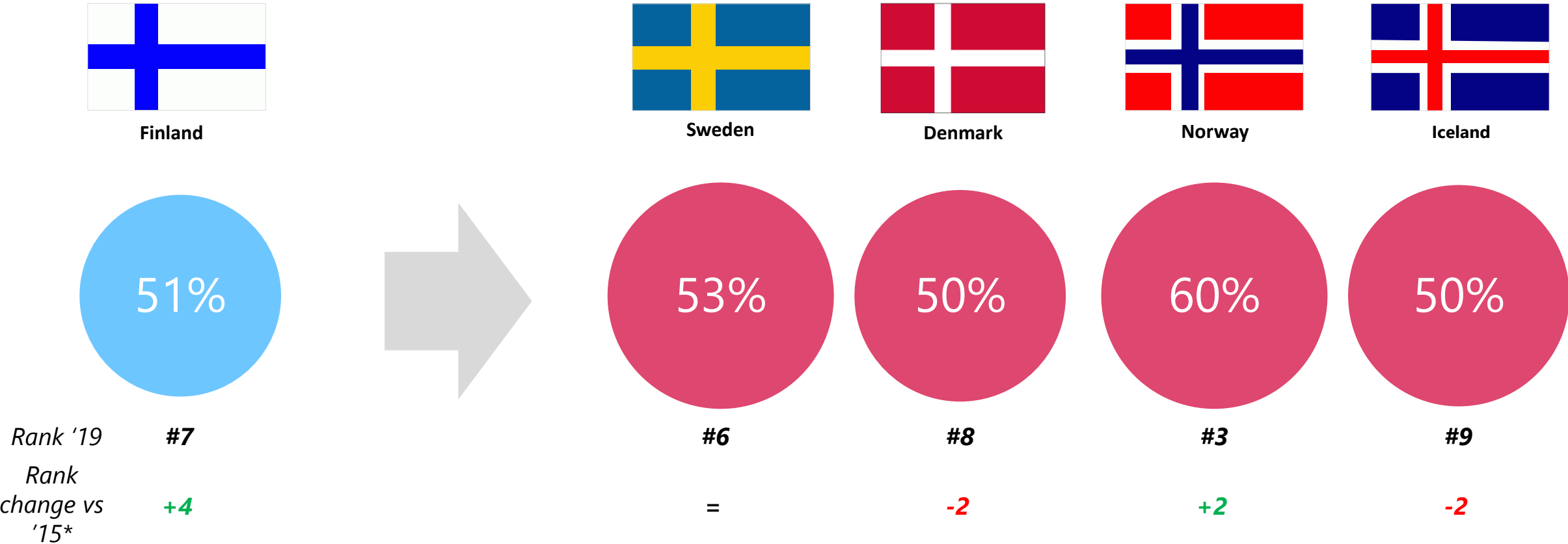
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,000)



A similar picture when prompted, though encouragingly consideration for Finland has grown in rank since 2015

Total Consideration



Q7. PROMPTED CONSIDERATION DESTINATION

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

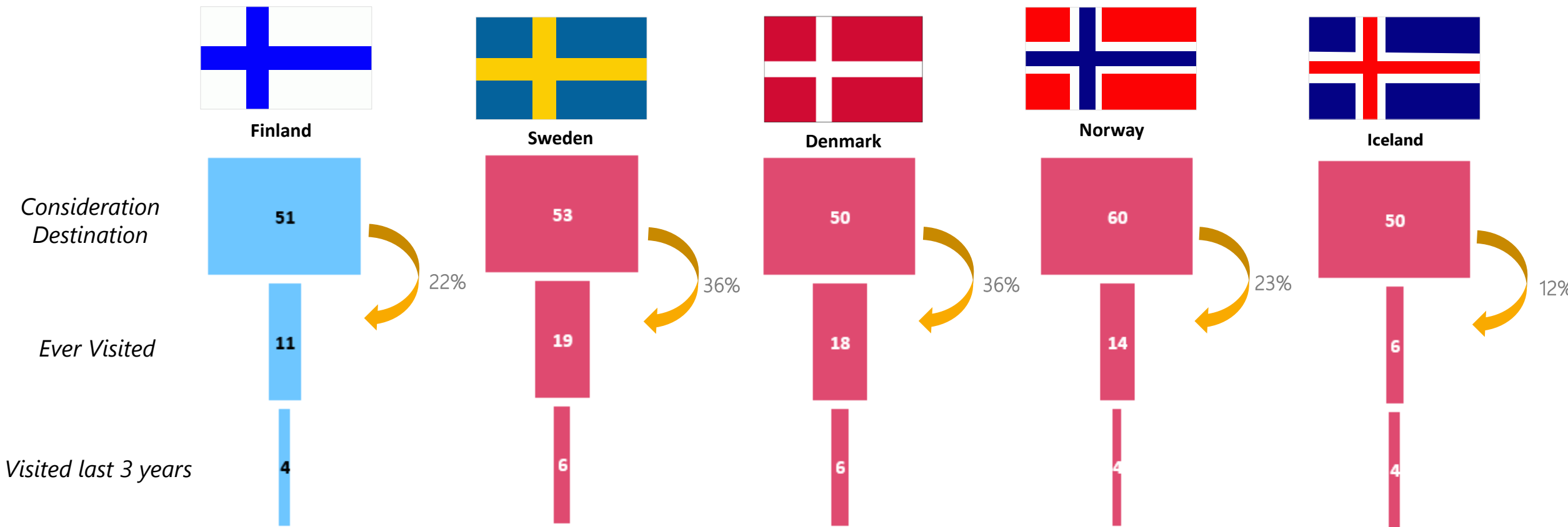
*=different methodology and consideration set used

Base: Total Sample (1,000)



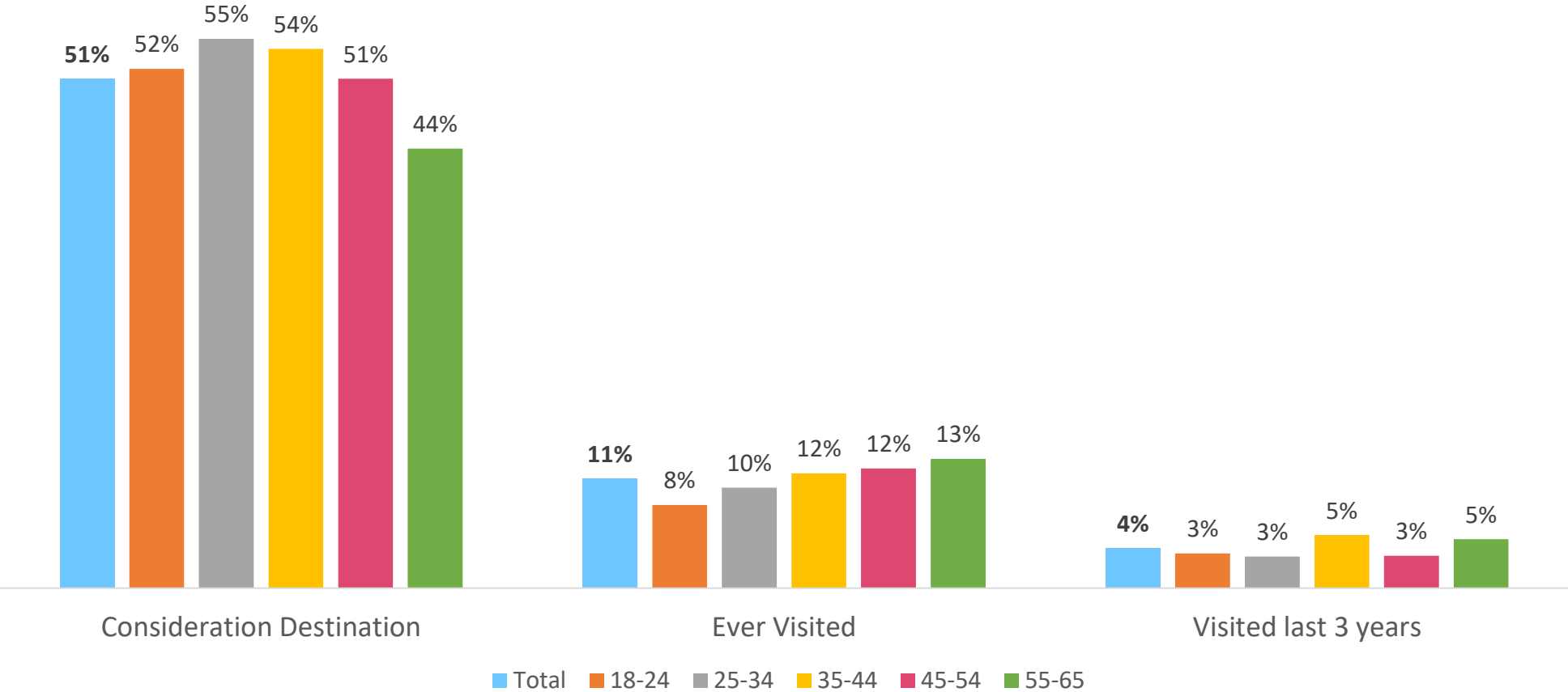
Claimed visitation to the Nordic region as a whole is low in Italy. Sweden and Denmark see the best conversion to visits

Consideration to P3Y visit funnel



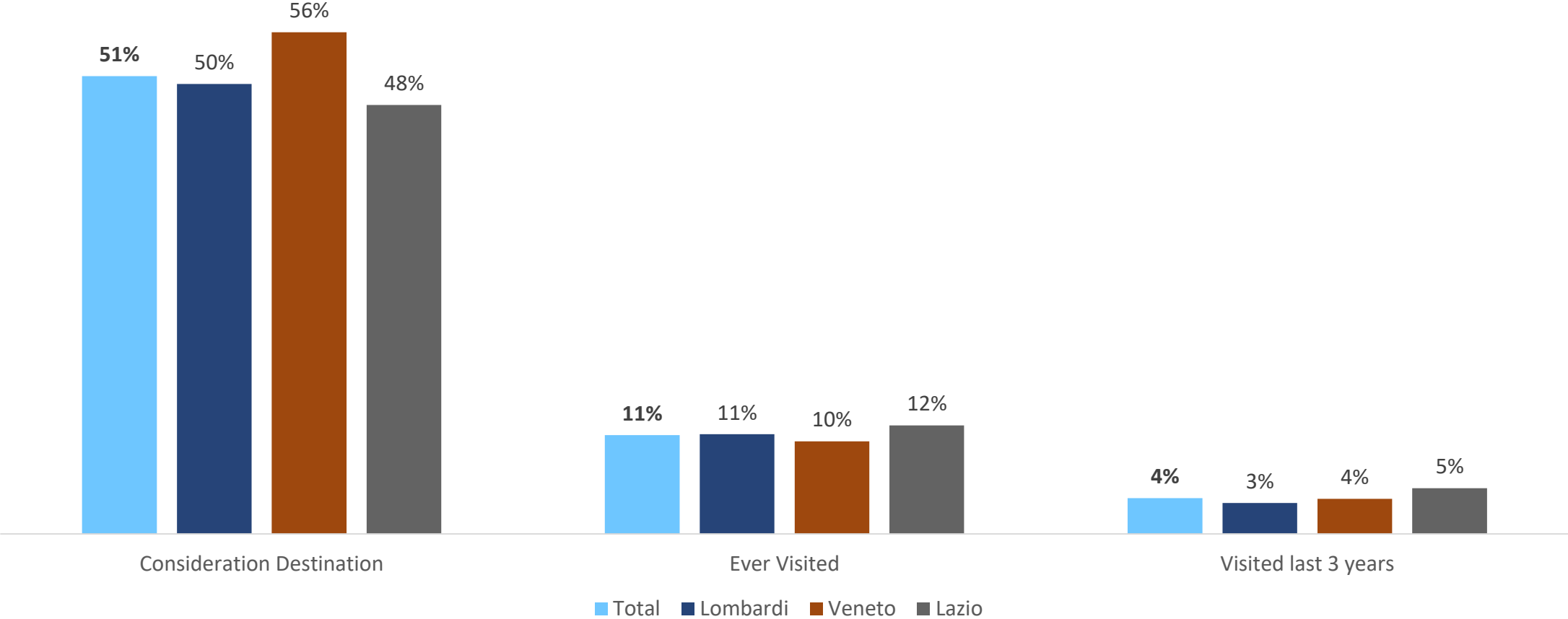
Demographically, there is little differentiation amongst age groups for those claimed to have visited Finland. The older target are somewhat less likely to consider Finland as a holiday destination

Age Profile



There is little variation between the different Italian regions

Regional Differentiation



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Q7 CONSIDERATION DESTINATION, Q3 EVER VISITED DESTINATION, Q6 VISITED P3Y

Sig diff at 95%
vs Total Sample



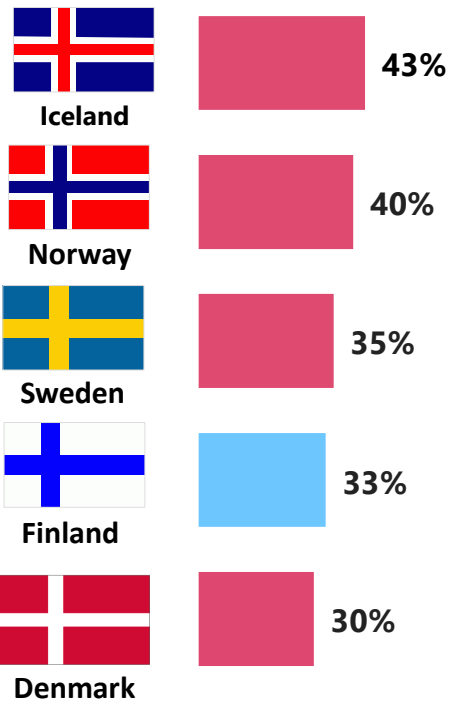
Base: Total Sample (1,000)



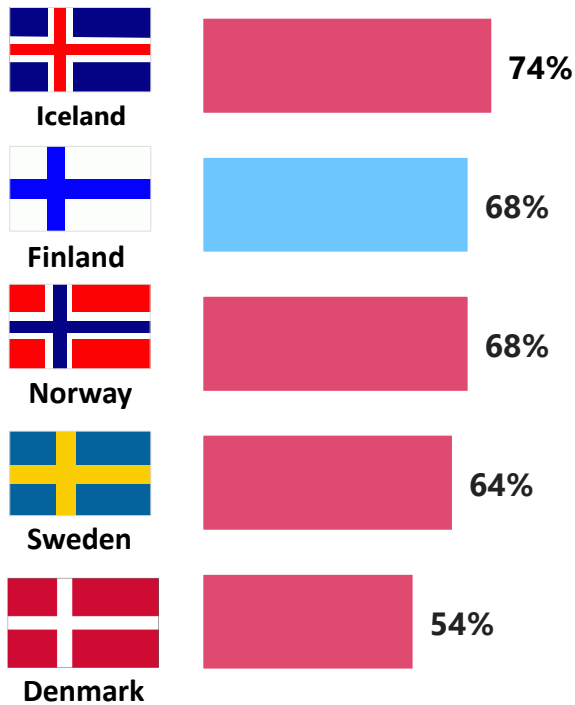
Key barrier to visit Finland as well as its Nordic neighbours lie around perceptions as only being for people that like to be outside a lot

Barriers to visit

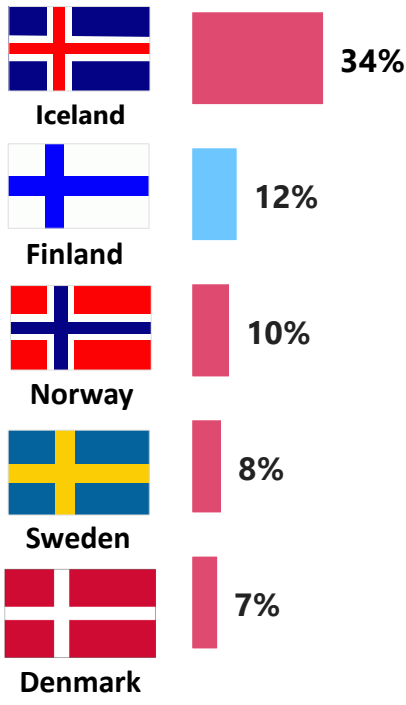
It's too expensive



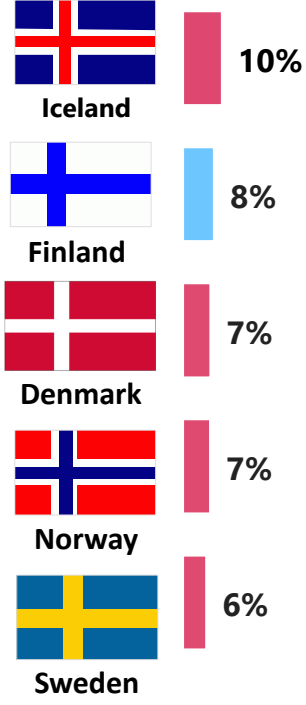
It is only for people who like to be outside a lot



It's too inaccessible/hard to reach



There is nothing much to do



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Q14 BARRIERS

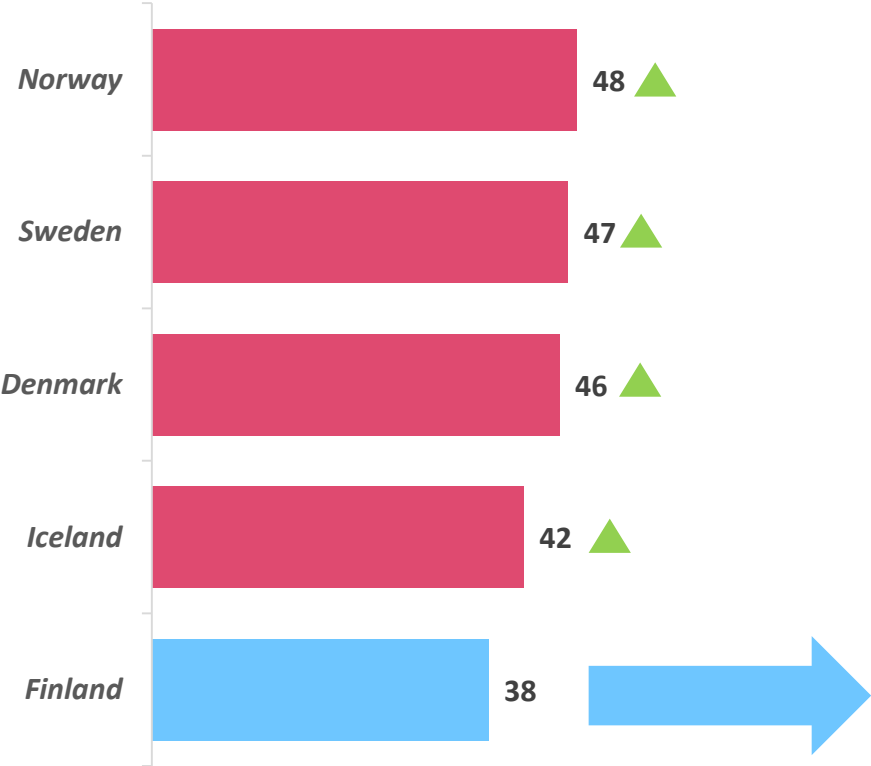
Please now consider the following statements. Do you associate any of these holiday destinations with these statements?



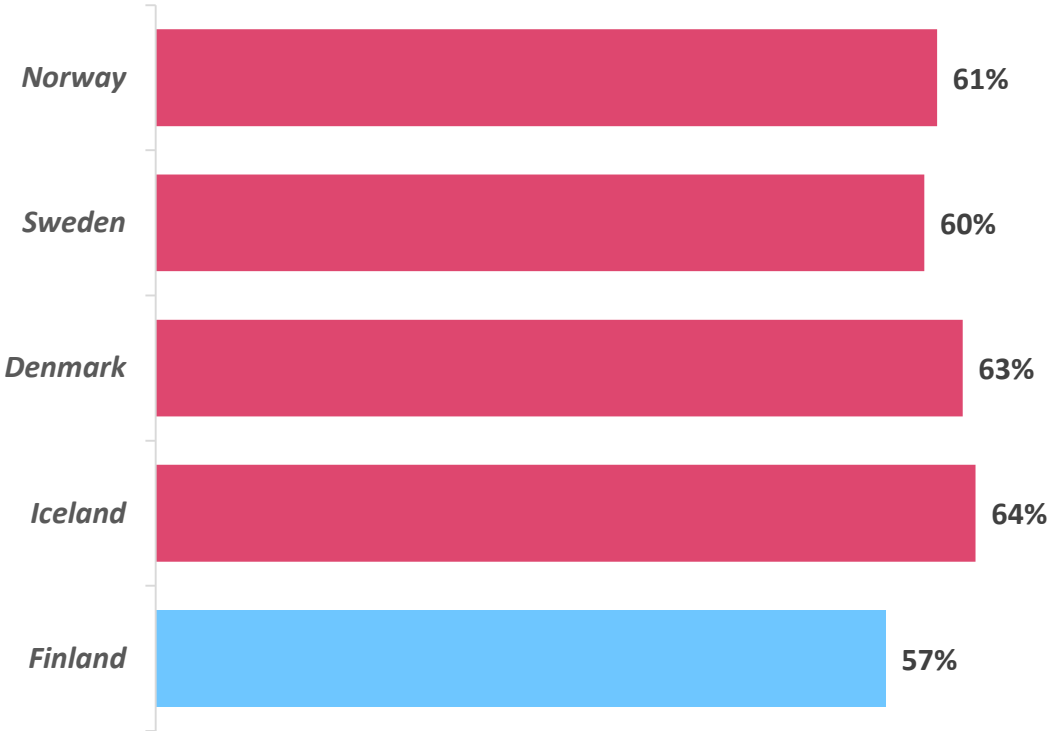
Base: Total Sample (1,000)

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



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Q10 DESTINATION KNOWLEDGE

How much do you feel you know about each of these countries as a holiday destination?

Sig diff at 95%
vs Finland ▲ ▼

Base: Total Sample (1,000)



**What are we known
for as a travel
destination?**



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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*

Lakes, woods,
Santa Claus,
Snow

*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 its a beautiful country

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

Natural landscapes, exceptional services at the highest levels

*Finland makes me think of
Santa Claus and wonderful,
unspoilt places*

*Cold, vast wildlife,
incredible views*

*Fjords, unspoiled nature,
immense spaces and full of
vegetation*

*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.

Koli National Park: a sense of serenity and wonder.

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



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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.



Base: Consideration Set: Finland (527)

Spontaneous Impressions – Competitors



Q9 BMN

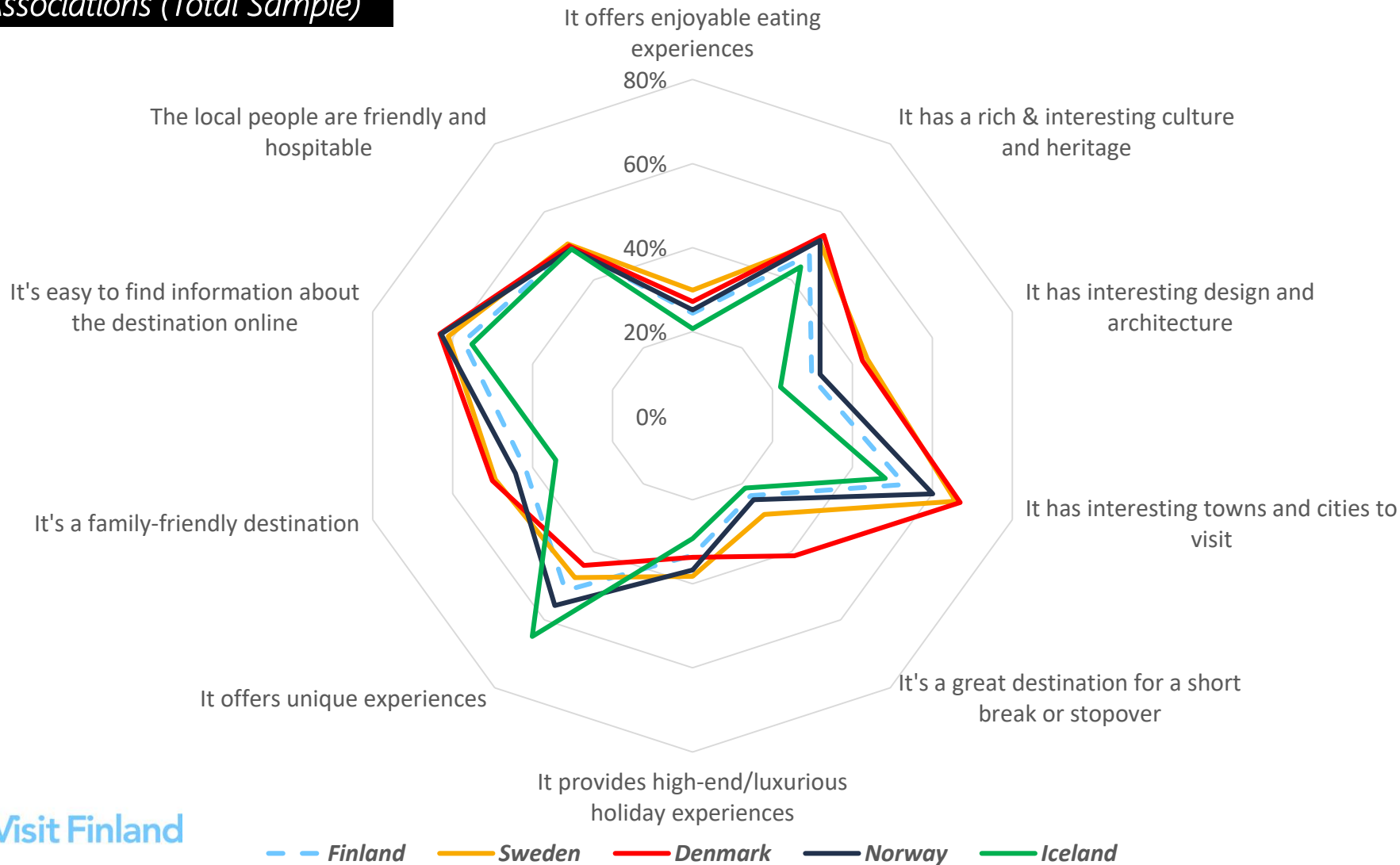
Norway



14

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

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

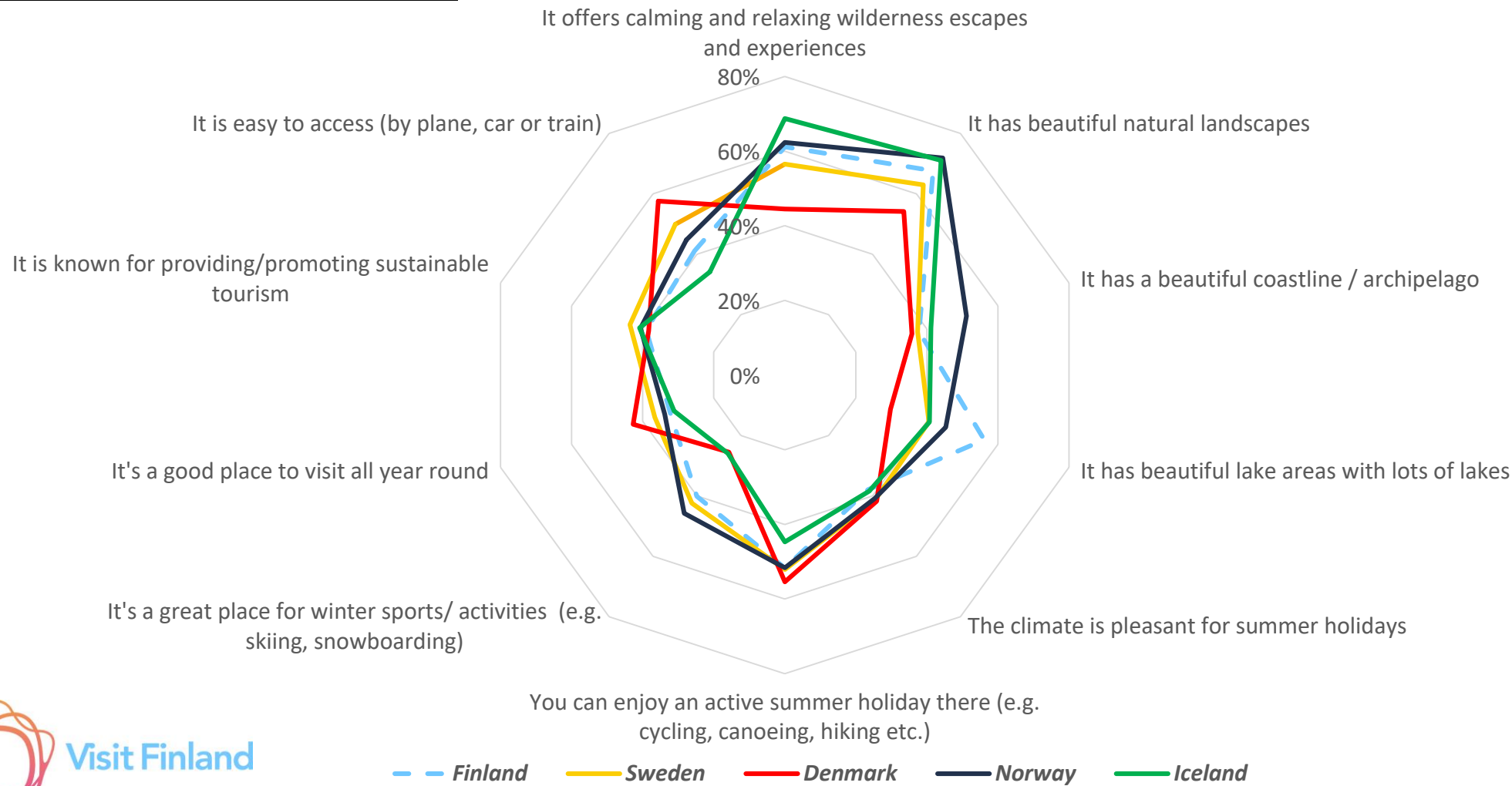
Do you associate any of these holiday destinations with the following statements?



Base: Total Sample (1,000)

A slightly stronger performance in terms of nature perceptions, particularly in terms of the lakes where Finland see a clear lead in Italy

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

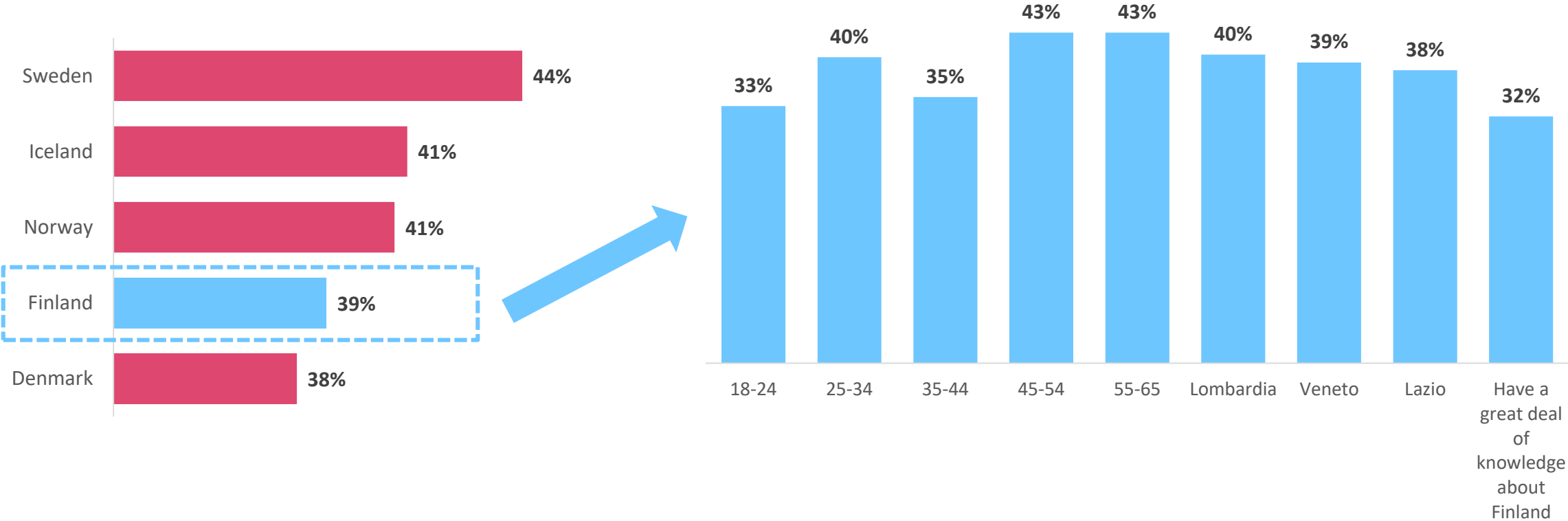
Do you associate any of these holiday destinations with the following statements?

Finland Sweden Denmark Norway Iceland



There is room to grow Finland's association with sustainable tourism amongst the Italian population

Image - It is known for providing/promoting sustainable tourism



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Q13 IMAGE ASSOCIATIONS

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

Sig diff at 95%
vs Total Sample



Base: Total Sample (1,000)



Sustainable travel destination - OEs

Tourism in harmony with the environment and local cultures.

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

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



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

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.



In your opinion, what is meant by a 'sustainable' travel destination?



Activity Associations

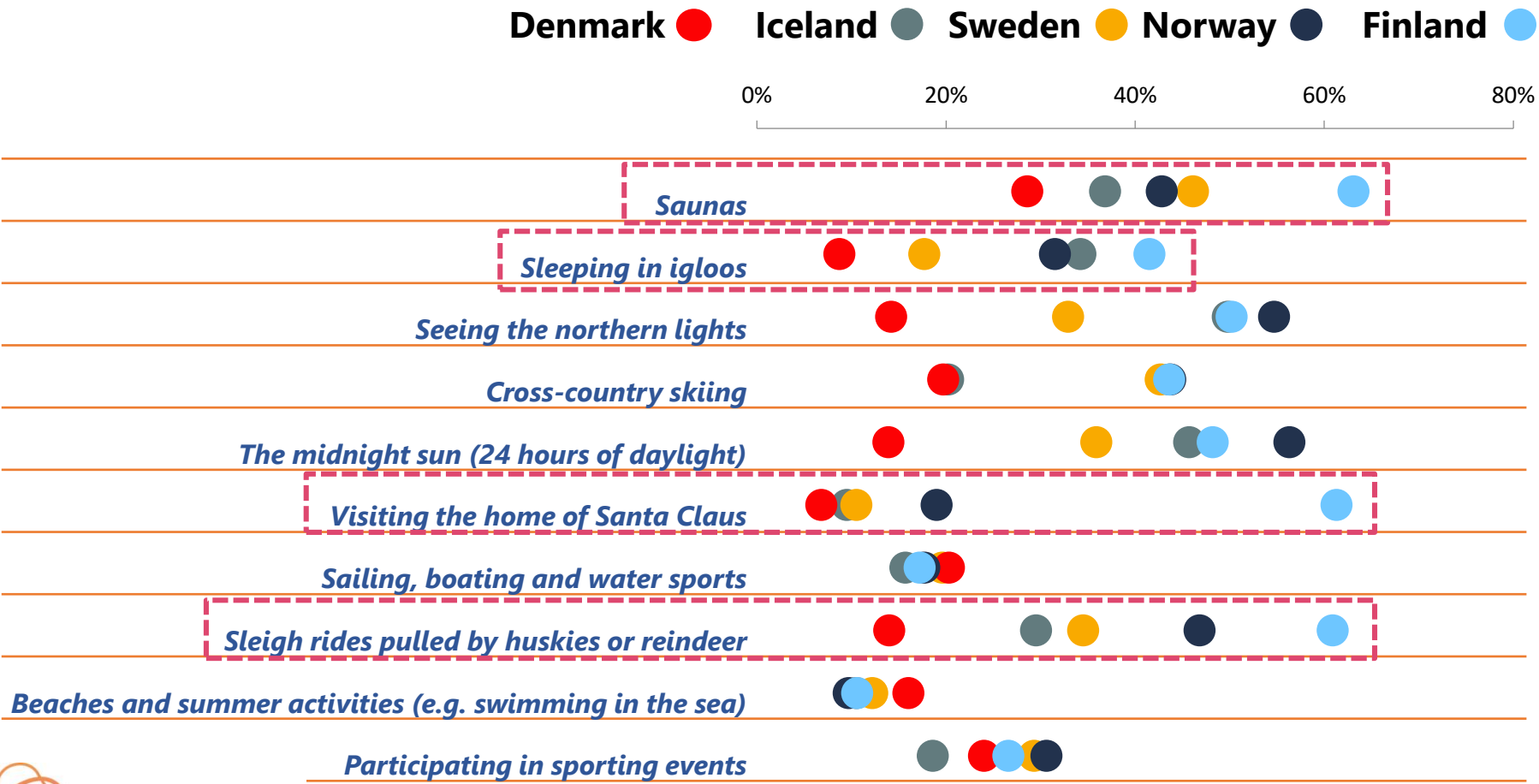


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In terms of activities and experiences associated with Finland, saunas, visiting Santa's home, sleigh rides and sleeping in igloos have strong links in Italy

Activities Associations



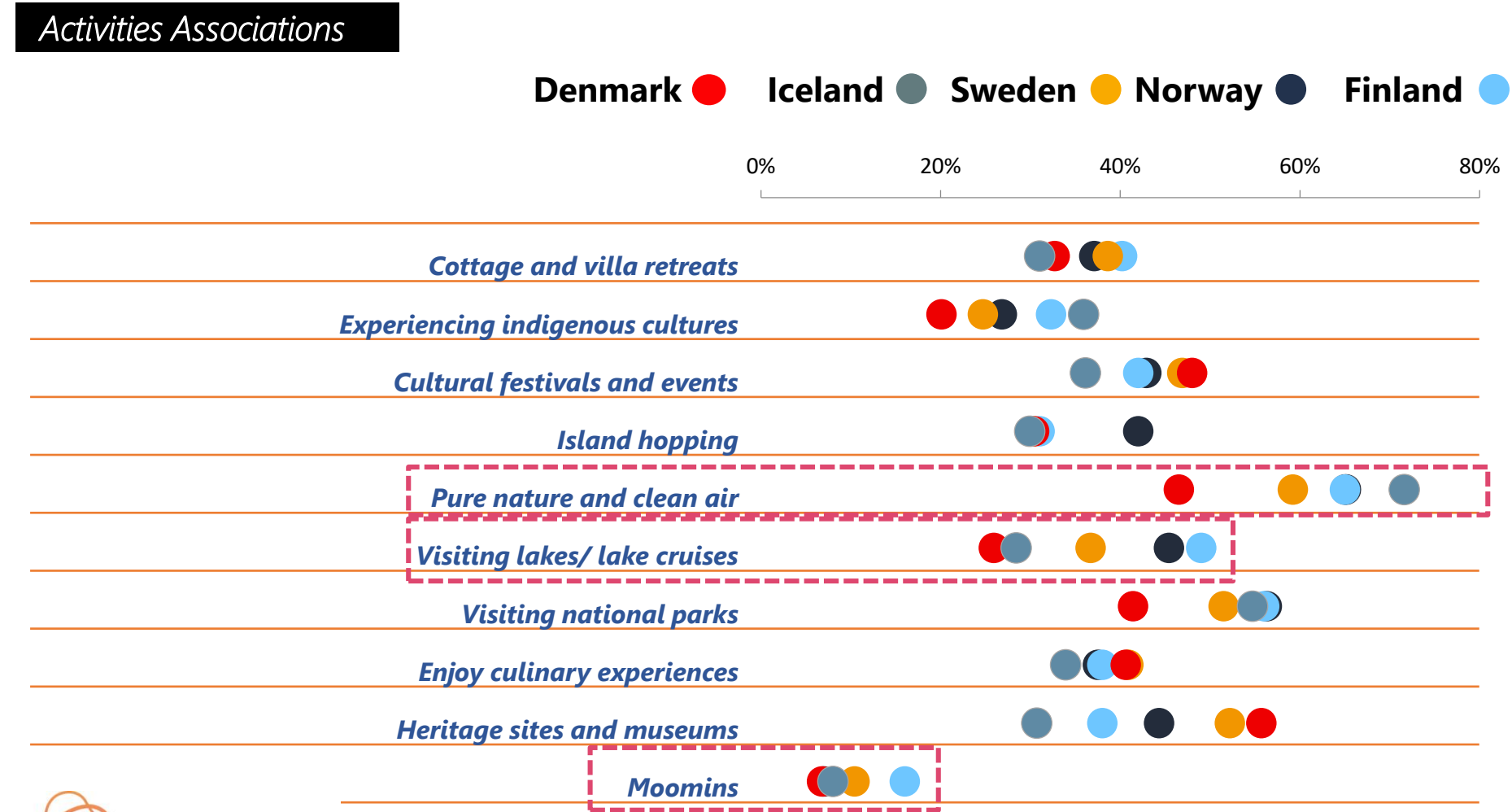
Q15 ACTIVITIES ASSOCIATION

Do you associate any of these holiday destinations with the following activities and experiences?



Base: Total Sample (1,000)

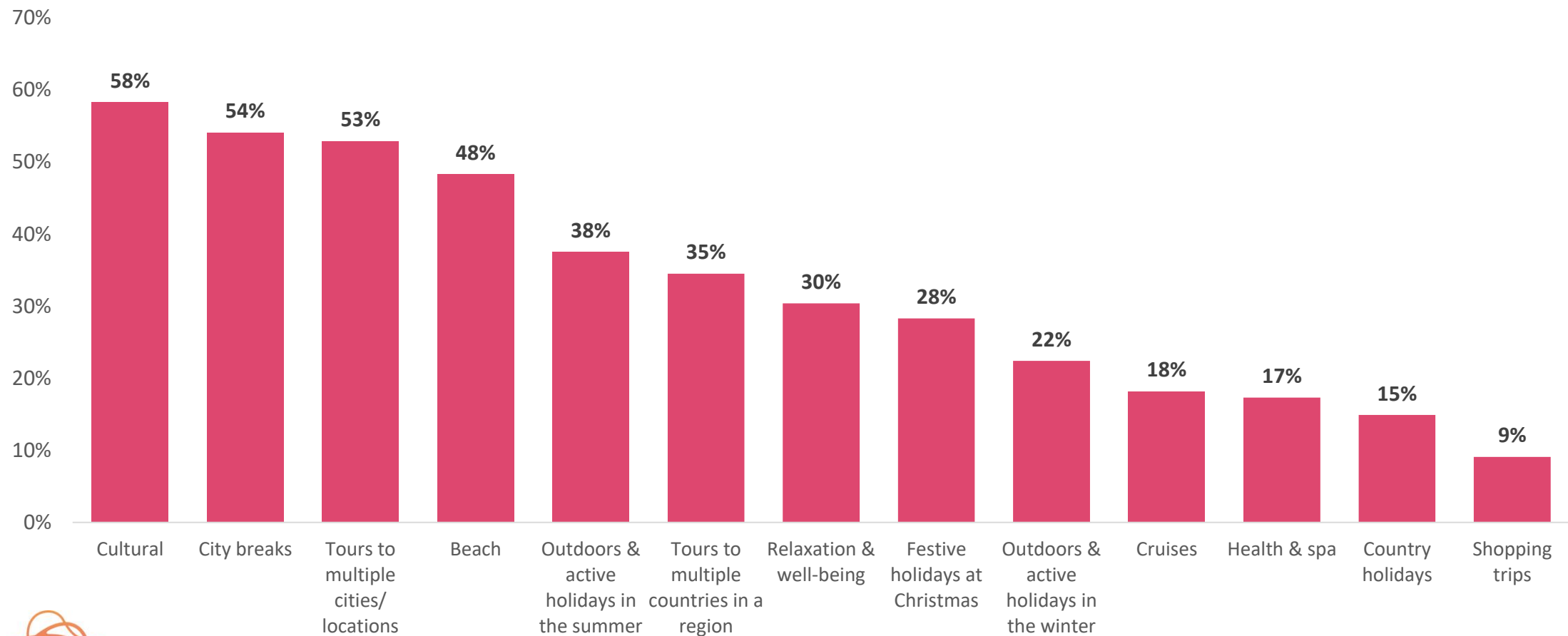
Activities around lakes see some good links to Finland too, though closely followed by Norway. Whilst not very well known, Moomins are also correctly linked to Finland



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

Preferred Holiday Type (Total Sample)



Q22 PREFERRED HOLIDAY TYPE

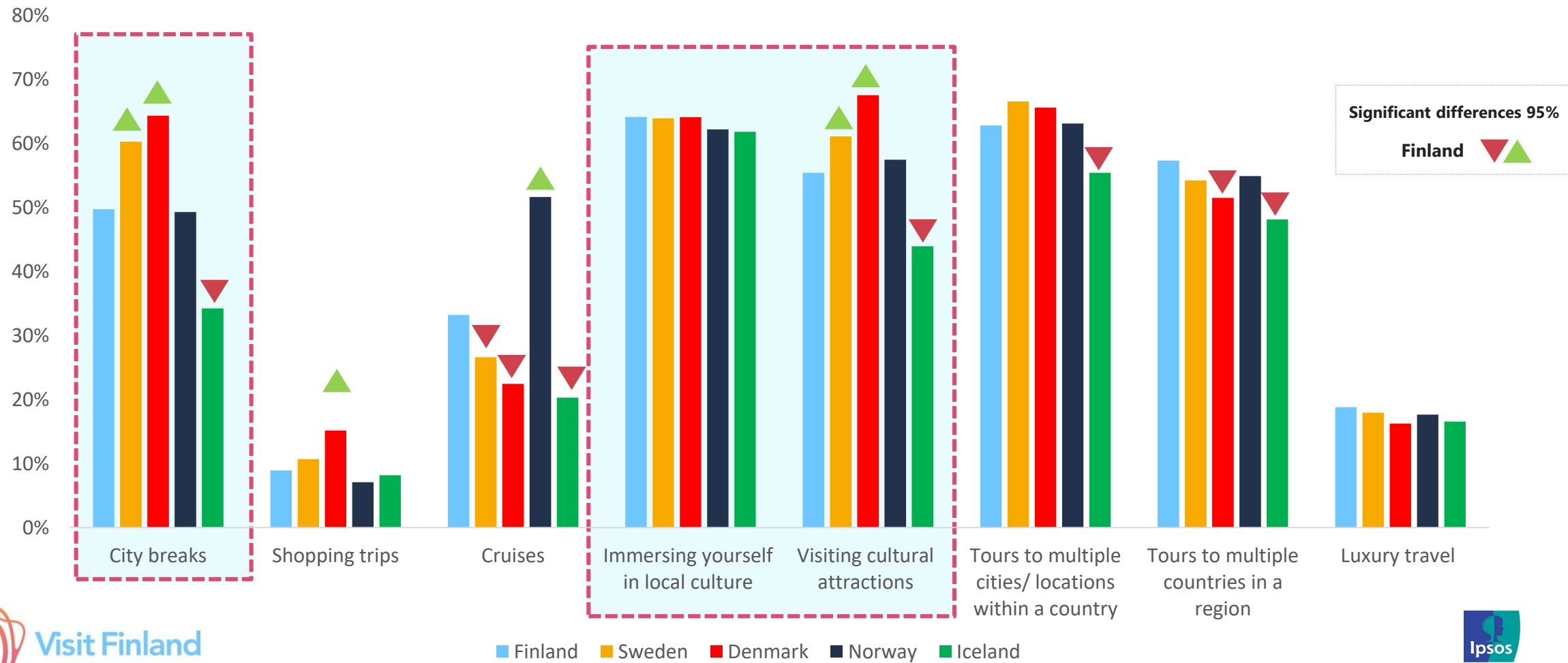
Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?



Base: Total Sample (1,000)

Work should be done to promote Finnish city breaks, especially focused around visiting cultural attractions, as Sweden and Denmark currently hold an advantage here

Holiday Type Consideration



Q12 CONSIDERATION HOLIDAY TYPE

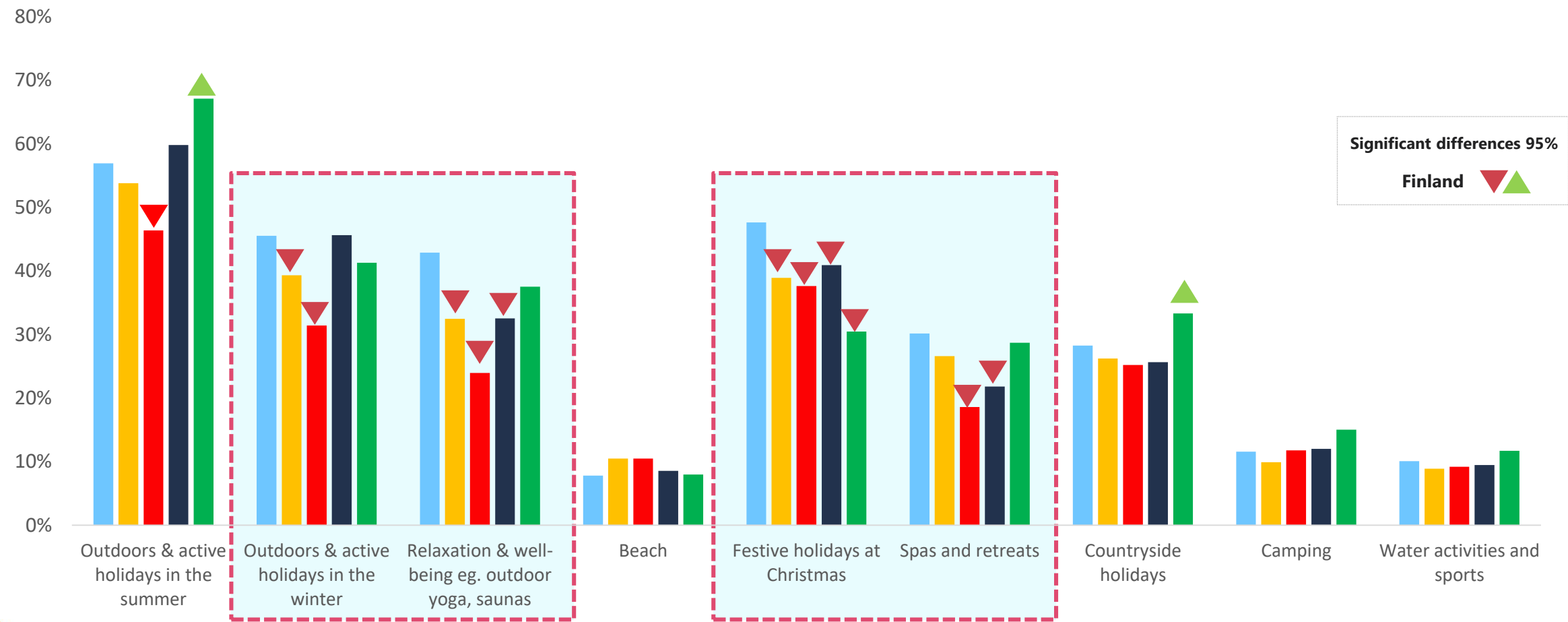
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Base: Consideration Set: Finland (527), Sweden (496), Denmark (468), Norway (550), Iceland (453)



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

Holiday Type Consideration



Q12 CONSIDERATION HOLIDAY TYPE
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Finland Sweden Denmark Norway Iceland

Base: Consideration Set: Finland (527), Sweden (496), Denmark (468), Norway (550), Iceland (453)

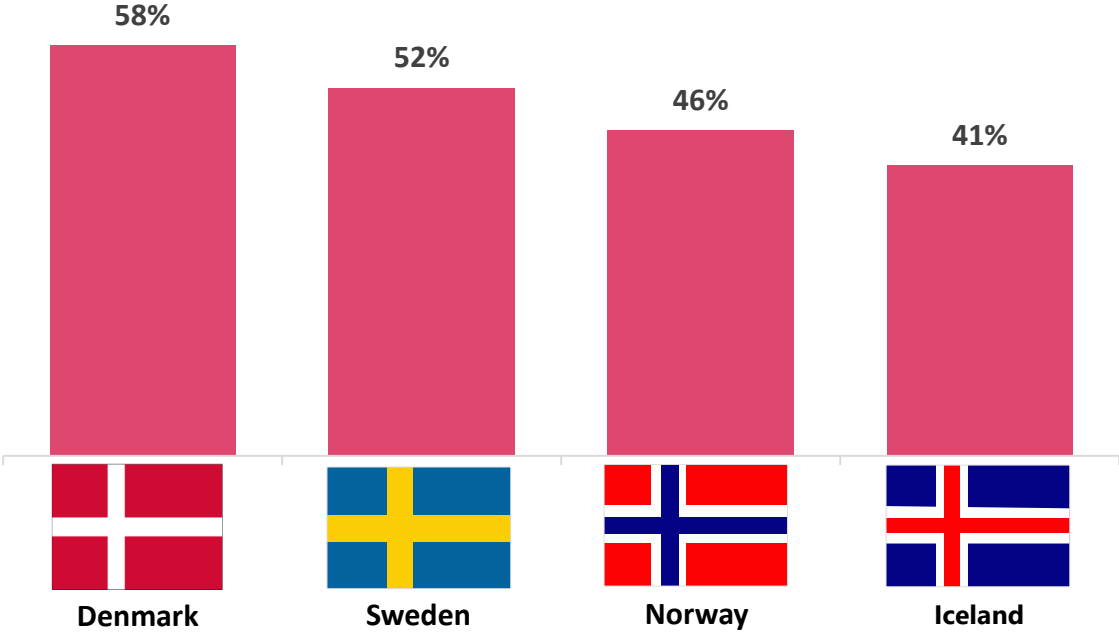
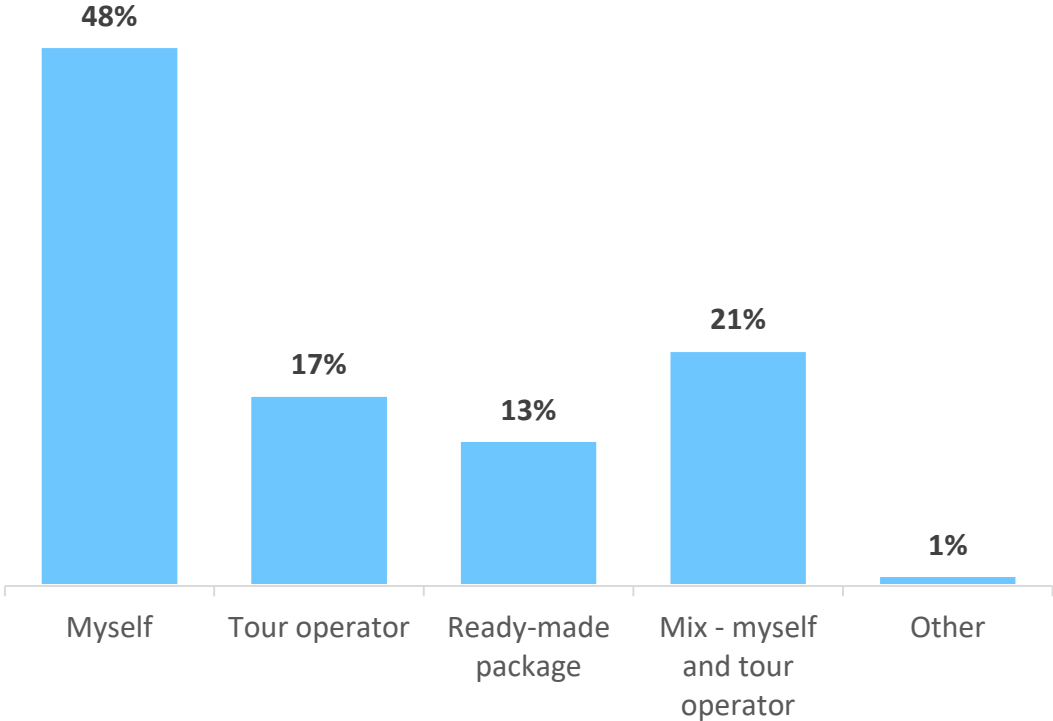


The majority of people in Italy who are considering visiting the Nordic countries plan and make the bookings themselves

Trip Arranging



Book trip myself



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Q11 TRIP ARRANGING

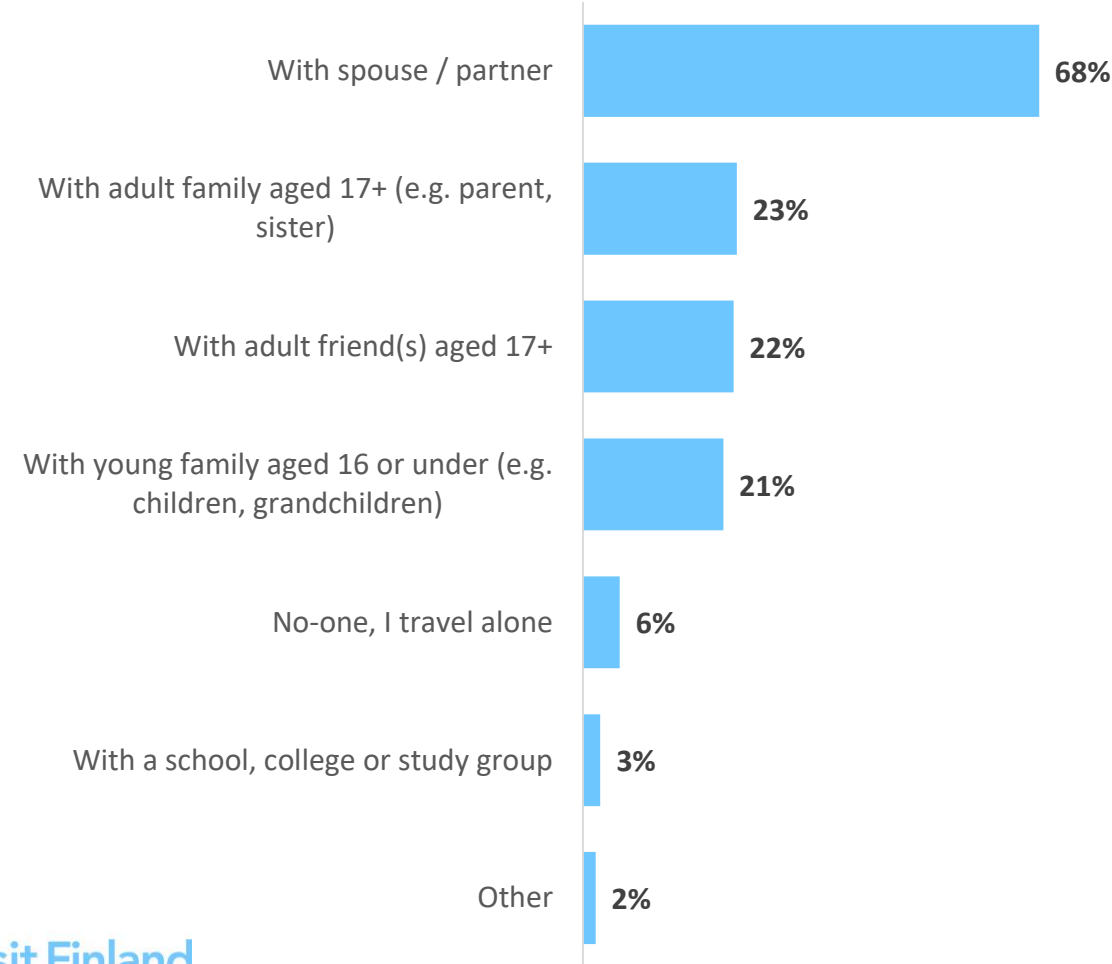
You said that you would consider a holiday or short break to the destinations below, how would you like to arrange your trip there?



Base: Consideration Set: Finland (527), Sweden (496), Denmark (468), Norway (550), Iceland (453) 26

Over two-thirds of Italians travel with their spouse or partner

Travel Companion



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Q21 TRAVEL COMPANION
When you travel abroad for holidays, who do you usually travel with?



Base: Total Sample (1,000)

Summary & Recommendations



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Summary and Final Thoughts.

- 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



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