Japan
City Pack
(Tokyo, Osaka, Nagoya)
Japan Market Context

• Finland is the strongest market in Japan amongst the Nordics
• Japanese outbound travel has increased 5% globally, providing an opportunity for Finland to capitalise on this through Japanese interest in Finnish design brands such as Marimekko and Iittala
• The Japanese have a strong interest in nature, auroras and Finnish lifestyle. There is a Sauna boom in Asia, providing a unique opportunity for increased visitation to Finland
• 2019 marks 100 years of diplomatic relations between Japan and Finland
• There is a Moomin park opening in Hanno, Japan in March 2019
• Finnair has a good reputation in Japan, with Finland being the hub for this airline. Finland is also the closest country in Europe to Japan both geographically and culturally. With it being associated with comfortable travelling and as a home away from home
• Japan is a very stable and mature market
Where do we rank in visitors minds?
When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland stands out from its Nordic competitors and is ranked well ahead of the other Nordic markets.

**Spontaneous Destination Consideration**

When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland stands out from its Nordic competitors and is ranked well ahead of the other Nordic markets.

Norway, Denmark & Iceland rank 26th, 37th and 39th respectively.
When prompted however, consideration of Finland as a holiday destination is more inline with its Nordic neighbours (except Iceland) and has actually seen a fall in rank since 2015.

**Total Consideration**

<table>
<thead>
<tr>
<th>Country</th>
<th>2019 Rank</th>
<th>Change vs '15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>#9</td>
<td>-4</td>
</tr>
<tr>
<td>Sweden</td>
<td>#8</td>
<td>+1</td>
</tr>
<tr>
<td>Norway</td>
<td>#10</td>
<td>-1</td>
</tr>
<tr>
<td>Denmark</td>
<td>#11</td>
<td>+1</td>
</tr>
<tr>
<td>Iceland</td>
<td>#15</td>
<td>=</td>
</tr>
</tbody>
</table>

* = different methodology and consideration set used

Base: Total Sample (1,000)
Conversion to claimed visitation is high – highlighting Finland’s strong position amongst Japanese travellers

**Consideration to P3Y visit funnel**

- **Finland**
  - Consideration: 27
  - Visited last 3 years: 8
  - Conversion rate: 59%

- **Sweden**
  - Consideration: 28
  - Visited last 3 years: 14
  - Conversion rate: 50%

- **Denmark**
  - Consideration: 22
  - Visited last 3 years: 13
  - Conversion rate: 59%

- **Norway**
  - Consideration: 24
  - Visited last 3 years: 11
  - Conversion rate: 46%

- **Iceland**
  - Consideration: 12
  - Visited last 3 years: 4
  - Conversion rate: 33%

**Visit Finland**

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

Base: Total Sample (1,000)
Demographically, and inline with the long-haul travel involved, 18-34 year olds are less likely to consider or have visited Finland.

**Age profile**

Considering Destination and Ever Visited Destination, there is a significant difference at 95% confidence level between the Total Sample and each age group.

In Consideration Destination, the 18-34 age group is less likely to consider Finland (27%) compared to the Total Sample (30%).

In Ever Visited Destination, the 18-34 age group is also less likely to have visited Finland (16%) compared to the Total Sample (18%).

In Visited last 3 years, the 18-34 age group is the least likely to have visited Finland (8%) compared to the Total Sample (16%).
There is little variation between the different Japanese cities interviewed.
Key barriers to visiting Finland lie around the perceived cost and outdoors focus

<table>
<thead>
<tr>
<th>Barriers to visit</th>
<th>Iceland</th>
<th>Finland</th>
<th>Norway</th>
<th>Sweden</th>
<th>Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s too expensive</td>
<td>47%</td>
<td>27%</td>
<td>26%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>It is only for people who like to be outside a lot</td>
<td>33%</td>
<td>27%</td>
<td>26%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>It’s too inaccessible/hard to reach</td>
<td>33%</td>
<td>21%</td>
<td>19%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>There is nothing much to do</td>
<td>28%</td>
<td>54%</td>
<td>22%</td>
<td>22%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,000)
What are we known for as a travel destination?
The northern lights, Santa and the Moomins all come to mind with the Japanese when thinking about Finland, as are the saunas and the nature.

**Spontaneous Impressions - Finland**

- Aurora, beautiful cold forest, lake, Moomin, fairy, Santa Claus.
- Moomin, lakes, glacier midnight sun.
- Aurora, fjords, reindeer food, midnight sun, Moomin, Helsinki, Marimekko, Santa Claus.

The closest country in Europe, convenient for airplane transfers.

Moomin village. The city of Santa.

I want to see the aurora.

Metal music, Santa Claus, salty liquorice, sauna.

Helsinki, Santa Claus, Marimekko, Iittala, Moomin.

Snow, glacier, aurora, the midnight sun, Santa Claus, Marimekko, salmon, Helsinki, cold, a history with Russia.

Dog sled, reindeer, Aurora, sauna, salmon cuisine, miscellaneous goods (Arabic, Iittala, Marimekko), calm city, Baltic Sea.

Snow, glacier, aurora, the midnight sun, Santa Claus, Marimekko, salmon, Helsinki, cold, a history of war with Russia.

Base: Consideration Set: Finland (298)
Norway and Iceland have strong spontaneous impressions around their nature whilst Sweden and Denmark see a stronger focus on cultural elements and the capital cities.

Spontaneous Impressions – Competitors

Sweden

- Beautiful
- Nature
- Stockholm
- Nobel
- Aurora

Norway

- Fjord
- Salmon
- Aurora

Iceland

- Mermaid
- Andersen
- Aurora

Denmark

- Tivoli
- Gardens
- Andersen
- Little

Base: Consideration Set: Sweden (281), Denmark (216), Norway (244), Iceland (110)
Although only around 1 in 3 Japanese have more than a fair amount of knowledge about Finland, a majority of those do claim they are likely to visit in the next three years, highlighting the opportunities with a larger knowledge base.

**Destination Knowledge (T2B)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Knowledge</th>
<th>Visitation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>32%</td>
<td>73%</td>
</tr>
<tr>
<td>Sweden</td>
<td>32%</td>
<td>62%</td>
</tr>
<tr>
<td>Denmark</td>
<td>29%</td>
<td>69%</td>
</tr>
<tr>
<td>Norway</td>
<td>27%</td>
<td>64%</td>
</tr>
<tr>
<td>Iceland</td>
<td>17%</td>
<td>68%*</td>
</tr>
</tbody>
</table>

* = low base n<50

Base: Total Sample (1,000)
Inline with spontaneous impression, Denmark and Sweden hold and edge in the Nordic region in terms of cultural perceptions.

Image Associations (Total Sample)

The local people are friendly and hospitable

It offers enjoyable eating experiences
- 80%

It has a rich & interesting culture and heritage
- 60%

It has interesting design and architecture
- 40%

It has interesting towns and cities to visit
- 30%

It provides high-end/luxurious holiday experiences
- 0%

It's a family-friendly destination

It's easy to find information about the destination online

It offers unique experiences

The Japanese interest in Finnish design brands (e.g. Marimekko and Iittala) still has some way to go to gain some ground from Sweden and Denmark.
Finland and Norway are stronger on nature perceptions with Finland leading on perceptions around its beautiful lakes and accessibility. There is currently little differentiation in relation to sustainable tourism.
Whilst Finland currently hold the lead in the Nordic region on association with sustainable tourism there is room to develop this further increase the gap Sweden

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Association</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>23%</td>
</tr>
<tr>
<td>Sweden</td>
<td>21%</td>
</tr>
<tr>
<td>Norway</td>
<td>19%</td>
</tr>
<tr>
<td>Denmark</td>
<td>18%</td>
</tr>
<tr>
<td>Iceland</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Q13 IMAGE ASSOCIATIONS**
Do you associate any of these holiday destinations with the following statements?

- 18-34: 25%
- 35-44: 23%
- 45-54: 30%
- 55-65: 18%
- Nagoya: 21%
- Tokyo: 23%
- Osaka: 21%
- Have a great deal of knowledge about Finland: 29%

**Sig diff at 95% vs Total Sample**

Base: Total Sample (1,000)
In your opinion, what is meant by a ‘sustainable travel destination’?

Sustainable travel destination - OEs

- Excessively avoid commercialisation by firmly retaining the valuable cultural, natural and local customs.
- Cycle economy, renewable energy.
- A movement that does not pollute the air that do not generate waste in large quantities.
- Conservation of the natural environment.
- Without destroying nature, to create jobs in the area, protect the history.
- It is possible to experience the culture.
- Tourism is not to crush the attractiveness of the region.
- Tourism of local production for local consumption.
- Protect the environment and culture.

Clean air and clean water, beautiful scenery, delicious food, wonderful culture, where you can feel the happiness.

Ensure temples are there from the old days.

Location that combines the natural and urban.

Areas where natural and cultural heritage is cherished.

I want it to feel natural. Eliminate souvenirs as much as possible so that tourists do not emit waste. I don’t want luxurious cuisine and shopping, I want to eat the local cuisine of the region with local people. Don’t have shops just for tourists in the tourist spot, I want to go to popular shops in the local area.

Conservation of the natural environment.

Visit Finland

Q23 SUSTAINABILITY

In your opinion, what is meant by a ‘sustainable travel destination’?
Activity
Associations
Wintery activities such as the northern lights and midnight sun along with more seasonal activities have strong links with Finland amongst the Japanese.

Activities Associations

- Saunas
- Sleeping in igloos
- Seeing the northern lights
- Cross-country skiing
- The midnight sun (24 hours of daylight)
- Visiting the home of Santa Claus
- Sailing, boating and water sports
- Sleigh rides pulled by huskies or reindeer
- Beaches and summer activities (e.g. swimming in the sea)
- Participating in sporting events

Base: Total Sample (1,000)
Inline with the love for cartoons, the Moomins are also well known and associated with Finland.
How are people visiting us?
The Japanese population most prefer cultural and relaxation holidays when they travel abroad.

### Preferred Holiday Type (Total Sample)

- **Culture** and **Relaxation & well-being**: 58% and 56%
- **Tours to multiple cities/locations within a country**: 41%
- **City breaks**: 40%
- **Shopping trips**: 29%
- **Country holidays**: 27%
- **Tours to multiple countries in a region**: 27%
- **Beach**: 22%
- **Outdoors & active holidays in the summer**: 19%
- **Cruises**: 18%
- **Festive holidays at Christmas**: 15%
- **Outdoors & active holidays in the winter**: 14%
- **Health & spa**: 4%

**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)
With cultural trips proving popular in the Japanese market, work needs to be done to differentiate ourselves from the rest of the Nordic region.
Finland is leading on relaxation holidays but have stiff competition from Iceland in terms of spas and retreats.

### Holiday Type Consideration

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>Finland</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Norway</th>
<th>Iceland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relaxation &amp; well-being eg. outdoor yoga, saunas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beach</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festive holidays at Christmas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spas and retreats</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Countryside holidays</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water activities and sports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Significant differences 95%

Base: Consideration Set, Finland (298), Sweden (281), Denmark (216), Norway (244), Iceland (110)
The majority of people in Japan who are considering visiting the Nordic countries plan and make the bookings themselves.

**Trip Arranging**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Myself</td>
<td>54%</td>
</tr>
<tr>
<td>Tour operator</td>
<td>9%</td>
</tr>
<tr>
<td>Ready-made package</td>
<td>24%</td>
</tr>
<tr>
<td>Mix - myself and tour operator</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: Consideration Set: Finland (298), Sweden (281), Denmark (216), Norway (244), Iceland (110)
Most Japanese people travel with their spouse or partner

**Travel Companion**

- With spouse / partner: 59%
- No-one, I travel alone: 21%
- With adult friend(s) aged 17+: 17%
- With adult family aged 17+ (e.g. parent, sister): 16%
- With young family aged 16 or under (e.g. children, grandchildren): 11%
- Other: 4%
- With a school, college or study group: 2%

Base: Total Sample (1,000)
Summary & Recommendations
In Japan, Finland is in the top of mind travel destination in the Nordic region. When prompted, consideration is more similar across the region but Finland still holds a solid #2 rank. A decline in rank vs 2015 is however a watch out.

Despite the strength in the Nordic region, only around 1 in 3 Japanese have more than a fair amount of knowledge about Finland, a majority (73%) of those do claim they are likely to visit in the next three years, highlighting the opportunities with a larger knowledge base.

Spontaneous and prompted perceptions of Finland have a strong nature focus in particular the beautiful lakes - can more be done to promoting the Lakeland and raising awareness of it as a tourist destination to widen the gap to Norway?

With cultural trips proving popular in the Japanese market, work needs to be done to differentiate ourselves better from the rest of the Nordic region. More can still be done to capitalise on the Japanese interest in Finnish design brands (e.g. Marimekko and Iittala) to gain some ‘culture ground’ from Sweden and Denmark.

Consider further links with the newly opened Moomin park in Hanno and Visit Finland to help attract more families and grow the perception of Finland as a family friendly and stable travel destination.

1 in 4 Japanese travellers would like to use ready-made package holidays when visiting Finland. Is enough done to link Visit Finland to companies offering these type of holidays in Japan?