



**Visit Finland**

# Japan

City Pack  
(Tokyo, Osaka, Nagoya)





# Japan Market Context

Visit Finland  
information

- 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

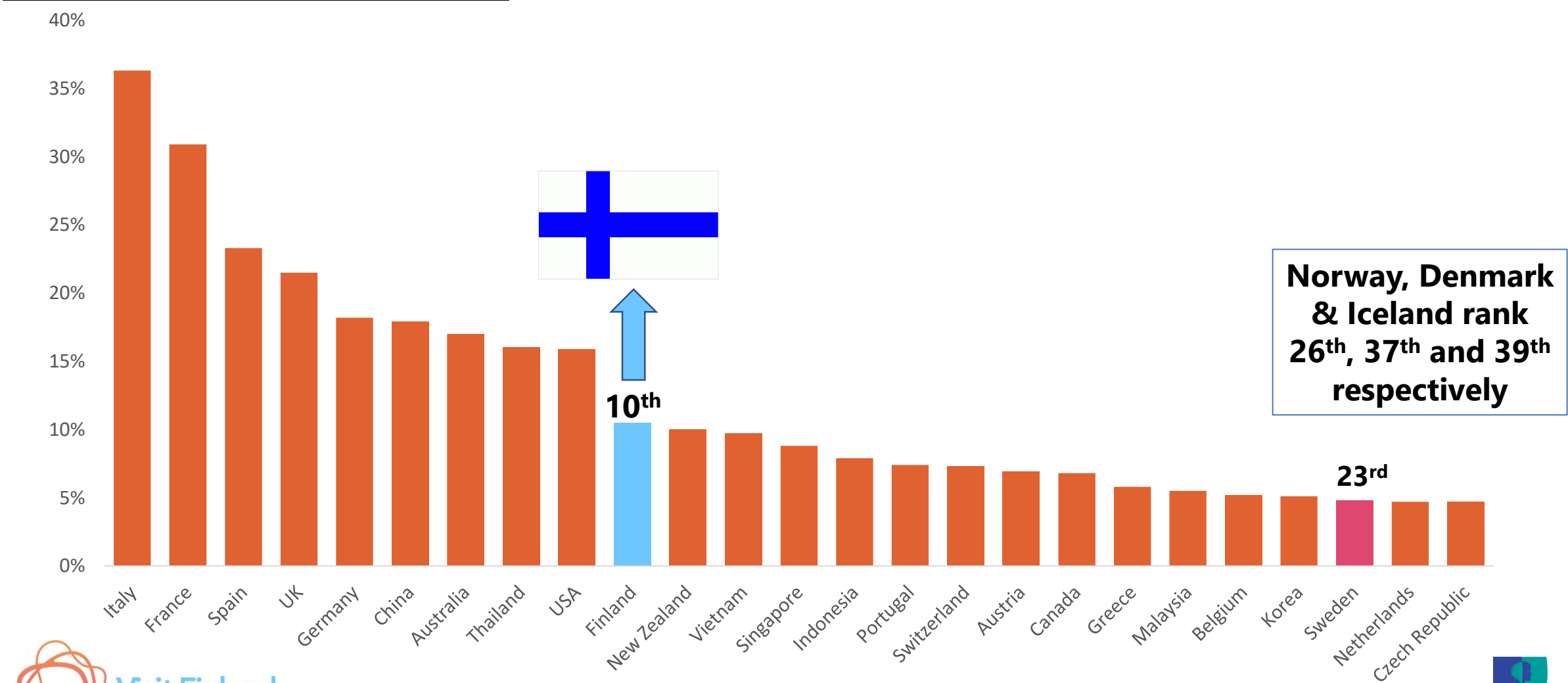


# Where do we rank in visitors minds?



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



Visit Finland

Q2. SPONTANEOUS CONSIDERATION DESTINATION

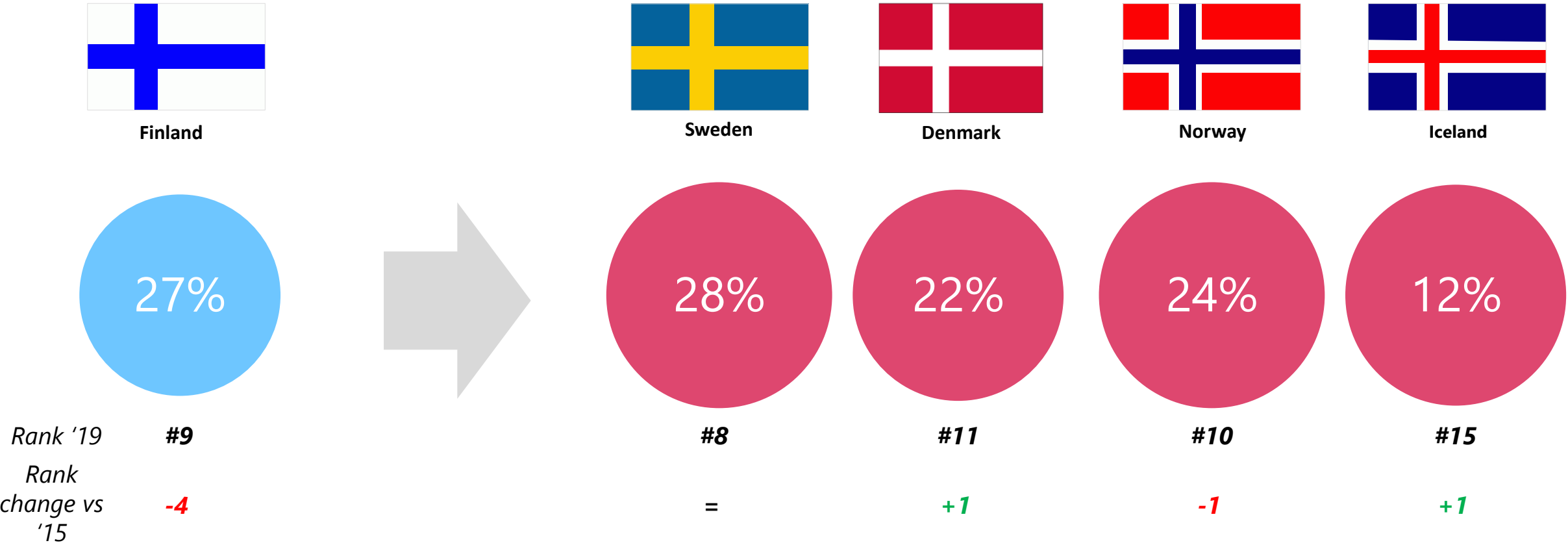
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries



Base: Total Sample (1,000)

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



Q7. PROMPTED CONSIDERATION DESTINATION

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

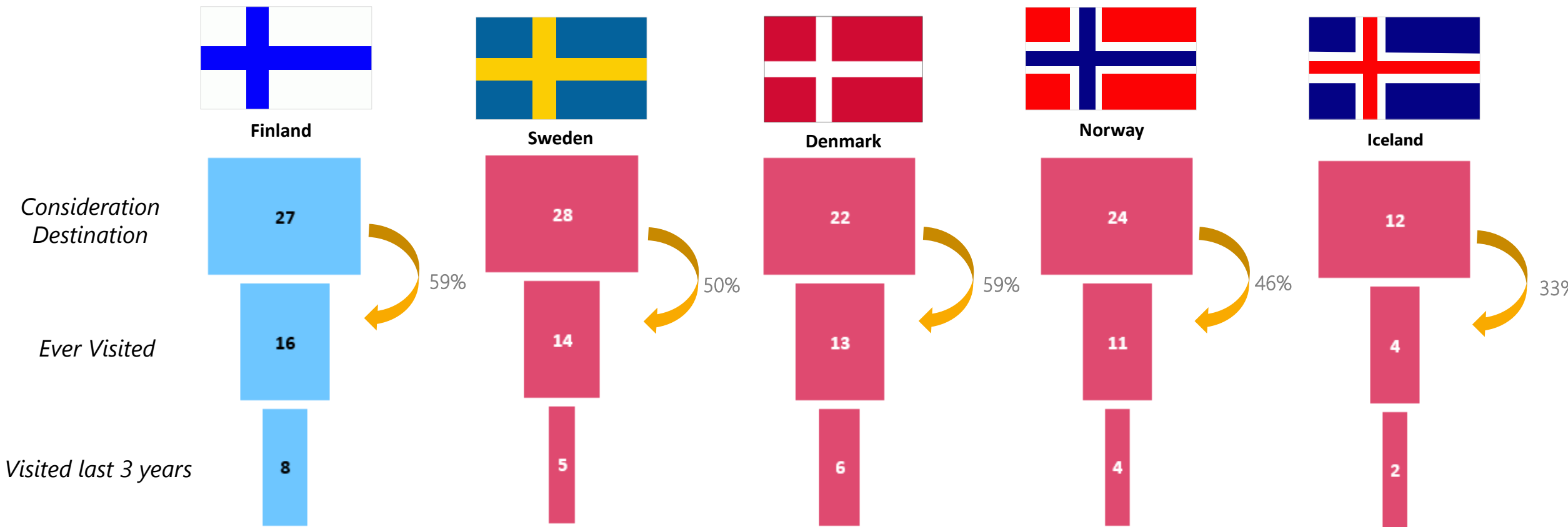
\*=different methodology and consideration set used



Base: Total Sample (1,000)

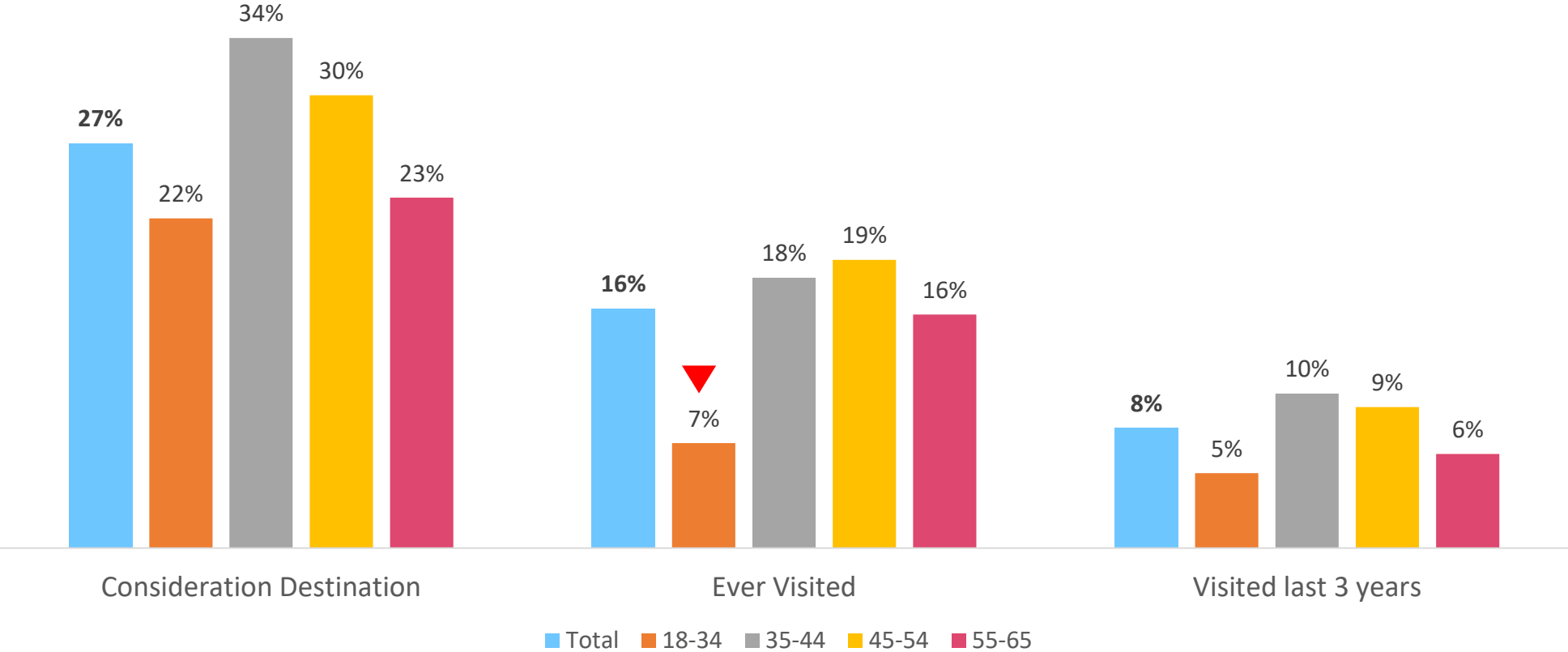
Conversion to claimed visitation is high – highlighting Finland’s strong position amongst Japanese travellers

Consideration to P3Y visit funnel



Demographically, and inline with the long-haul travel involved, 18-34 year olds are less likely to consider or have visited Finland

Age profile



Visit Finland

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

Sig diff at 95%  
vs Total Sample



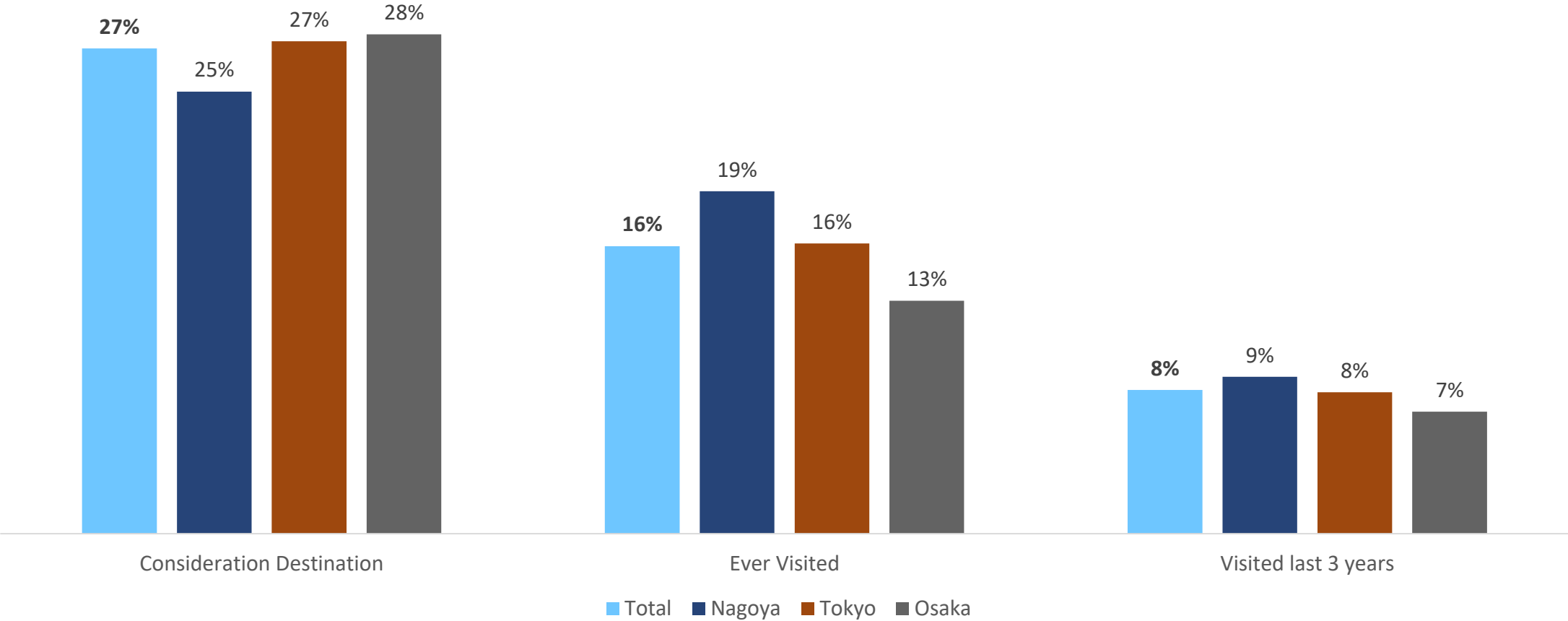
Base: Total Sample (1,000)





There is little variation between the different Japanese cities interviewed

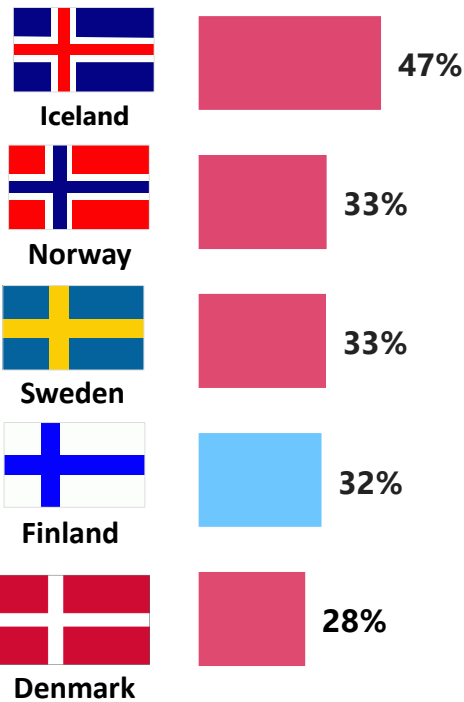
Regional Differentiation



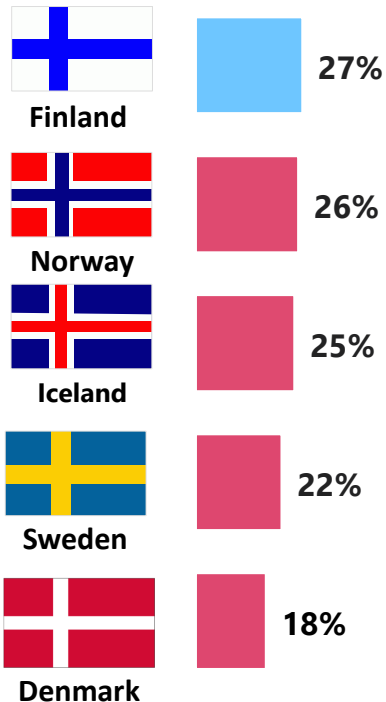
Key barriers to visiting Finland lie around the perceived cost and outdoors focus

Barriers to visit

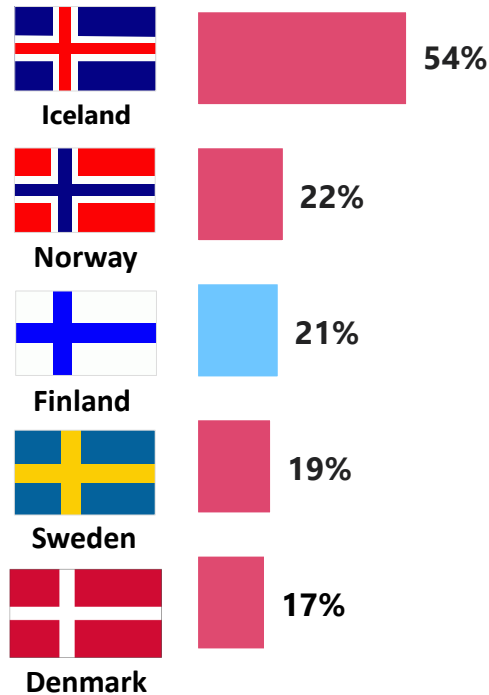
It's too expensive



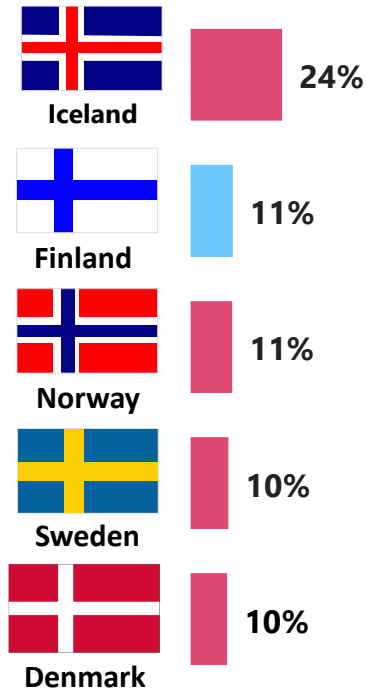
It is only for people who like to be outside a lot



It's too inaccessible/hard to reach



There is nothing much to do



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



Visit Finland





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,

European country closest to Japan with Finnair. Marimekko. seafood. Rovaniemi. Santa Claus. Moomin. The snow queen. Connected to the Baltic States.



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.

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, history war 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

Town of Santa Claus. Country of nature are many lakes and forests.

Beautiful nature  
Aurora, Santa Claus, Moomin.

Town of Santa Claus. Beautiful nature.

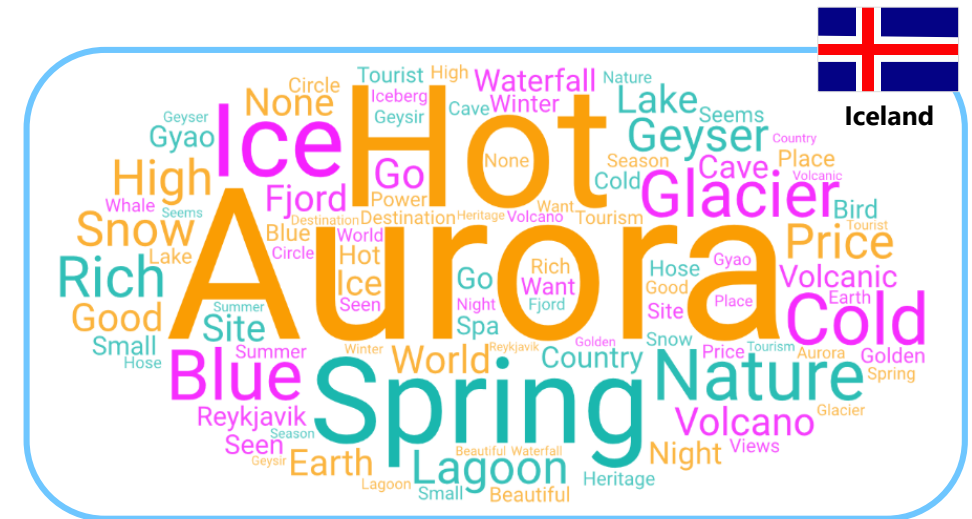
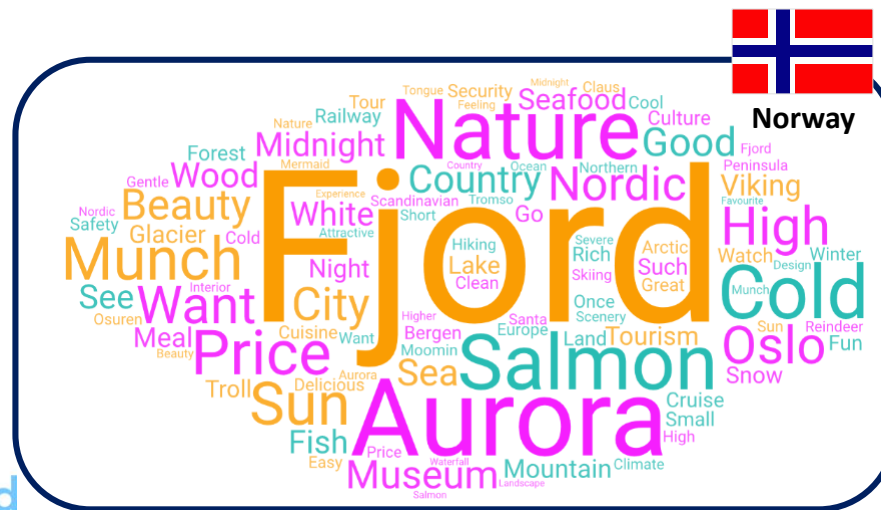
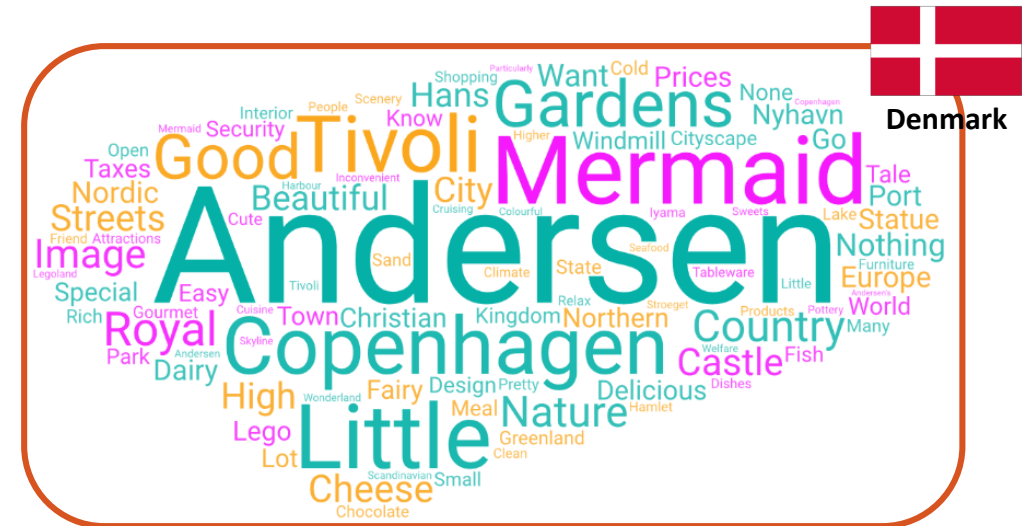
Base: Consideration Set: Finland (298)





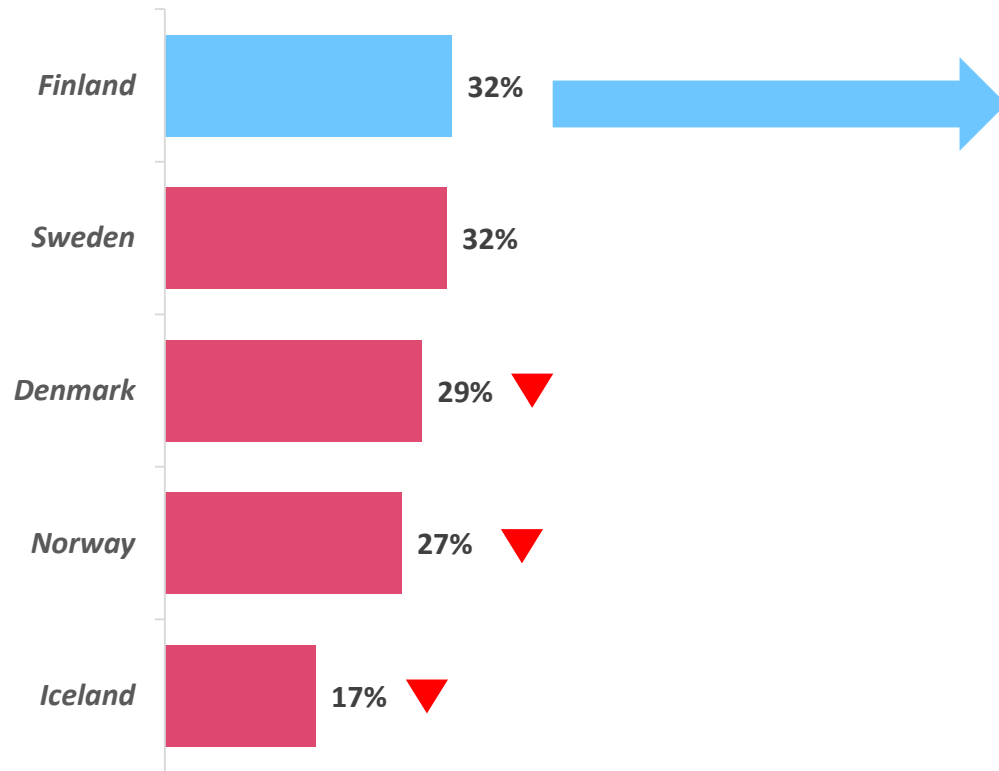
Norway and Iceland have strong spontaneous impressions around their nature whilst Sweden and Denmark see a stronger focus on cultural elements and the capital cities

### Spontaneous Impressions – Competitors

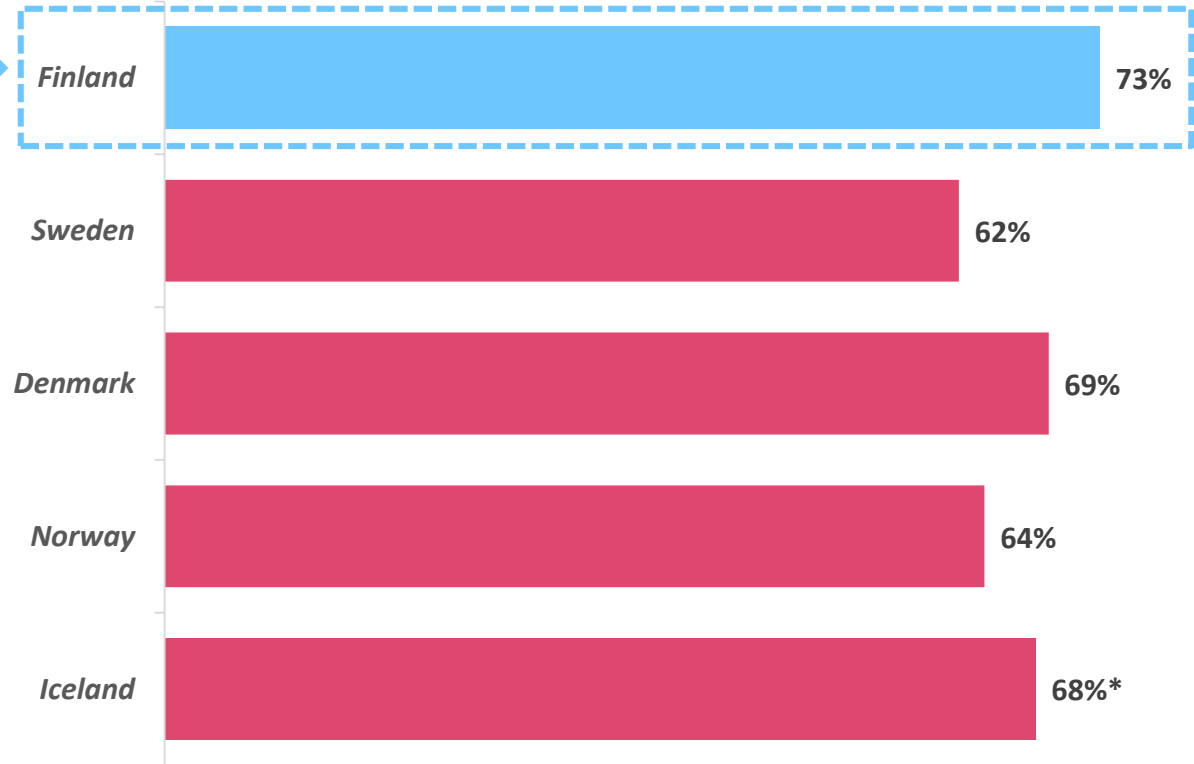


Although only around 1 in 3 Japanese have more than a fair amount of knowledge about Finland, a majority of those do claim they are likely to visit in the next three years, highlighting the opportunities with a larger knowledge base

Destination Knowledge (T2B)



Claimed visitation to country in the next three years (amongst those with more than a fair amount of knowledge of each country)



Q10 DESTINATION KNOWLEDGE  
How much do you feel you know about each of these countries as a holiday destination?

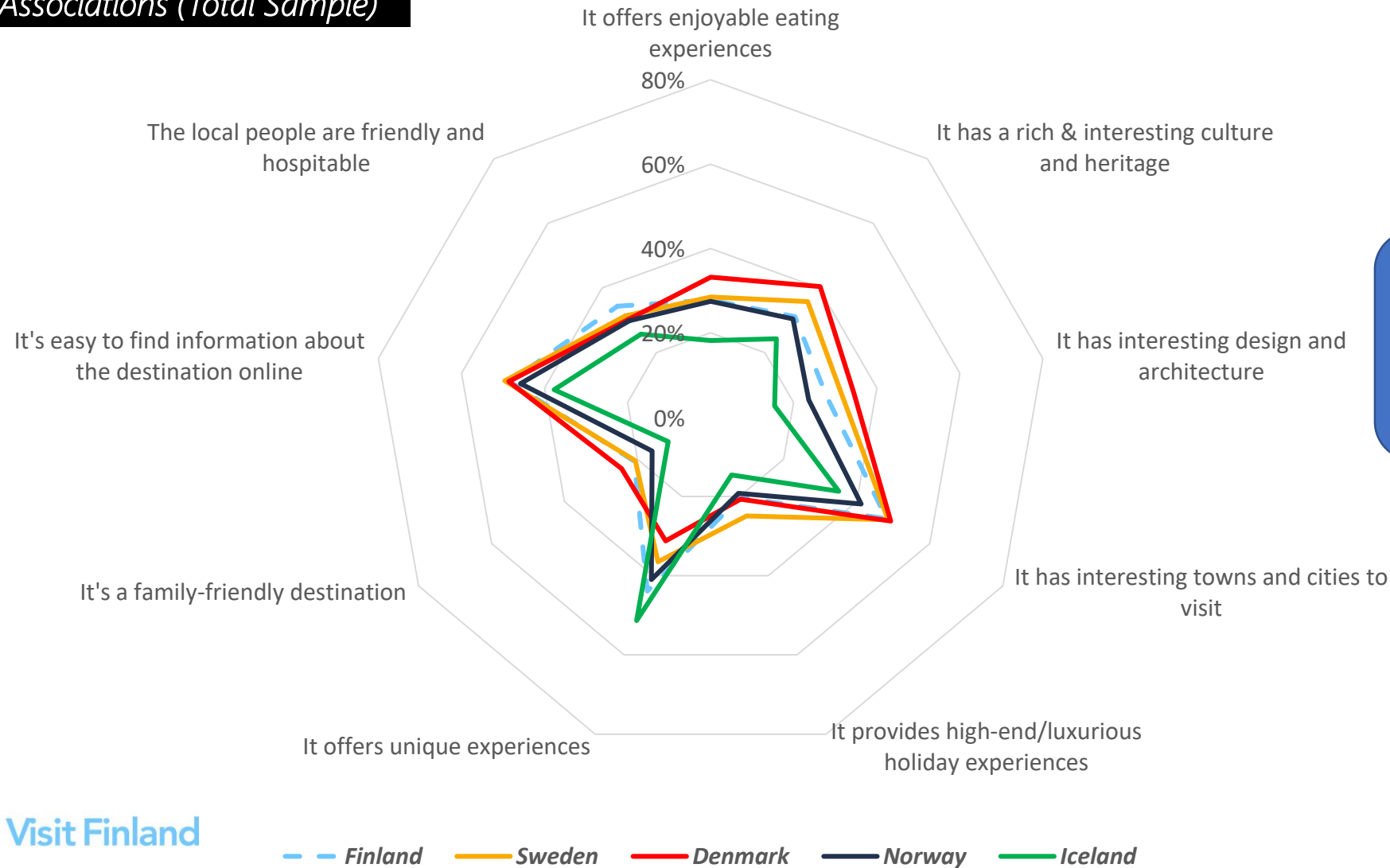
Sig diff at 95% vs Finland

\*= low base n<50  
Base: Total Sample (1,000)



Inline with spontaneous impression, Denmark and Sweden hold an edge in the Nordic region in terms of cultural perceptions

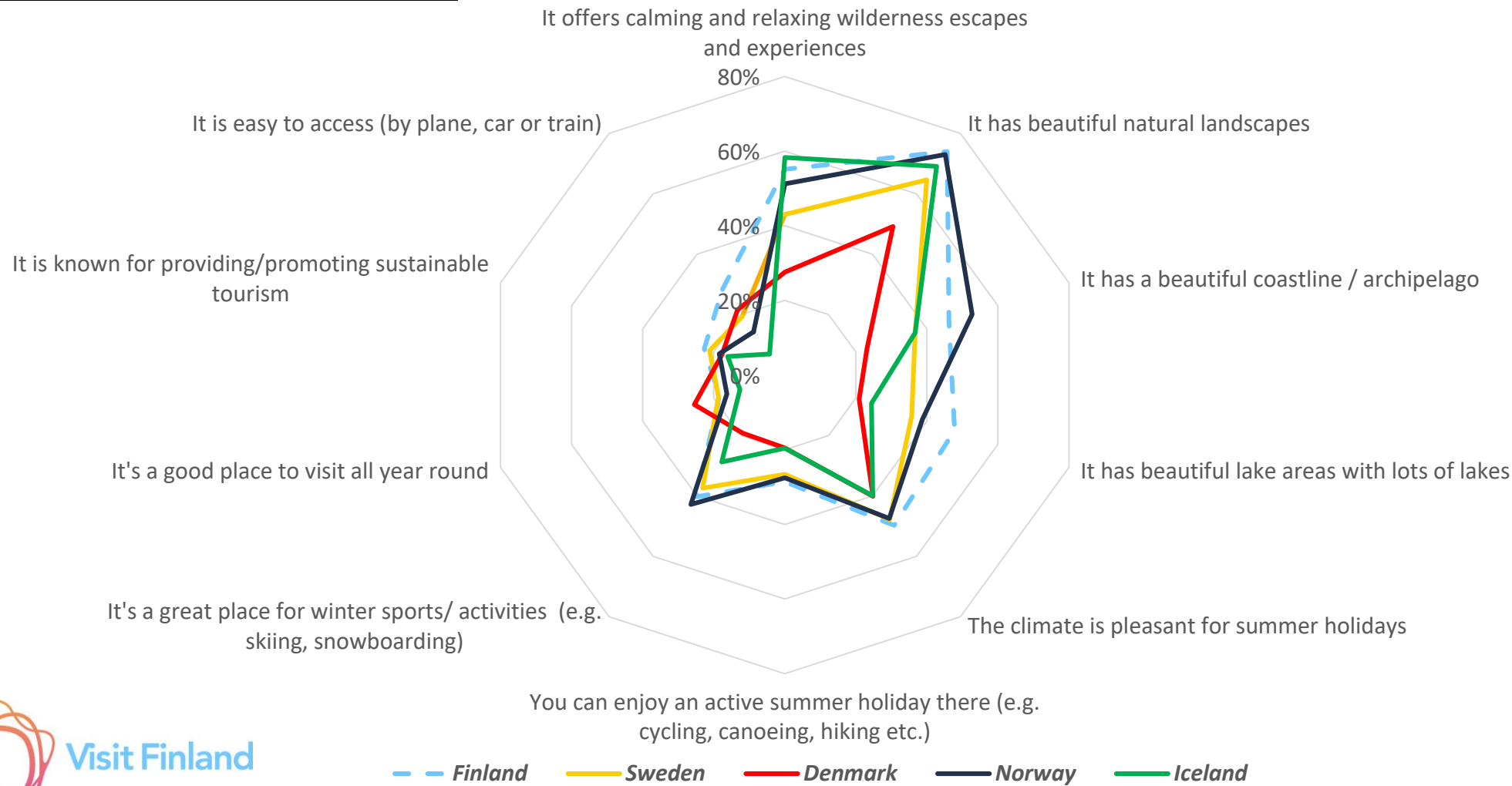
Image Associations (Total Sample)



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

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

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

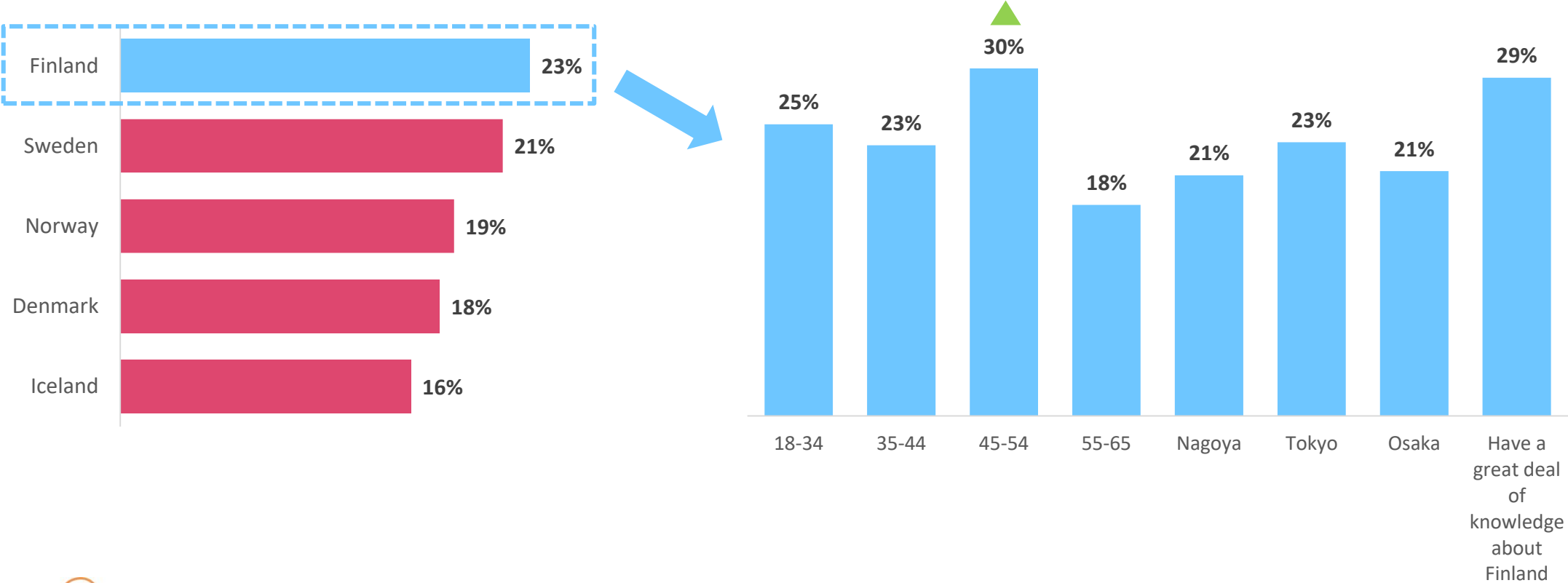
Finland Sweden Denmark Norway Iceland





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*



Visit Finland

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)



Perceptions of what a 'sustainable travel destination' is focus on maintaining the heritage and culture of the country whilst also protecting the natural environment from the impacts of tourism

## Sustainable travel destination - OEs

*Excessively avoid commercialisation by firmly retaining the valuable cultural, natural and local customs.*

*It is possible to experience the culture.*

Cycle economy,  
renewable energy

*Without destroying nature, to create jobs in the area, protect the history.*

*A movement that does not pollute the air that do not generate waste in large quantities.*

*Tourism is not to crush  
the attractiveness of  
the region*

*Conservation of the natural environment.*

*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.*

*Tourism of local production  
for local consumption*

*Protects the environment and culture*



Visit Finland

## Q23 SUSTAINABILITY

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





# Activity Associations

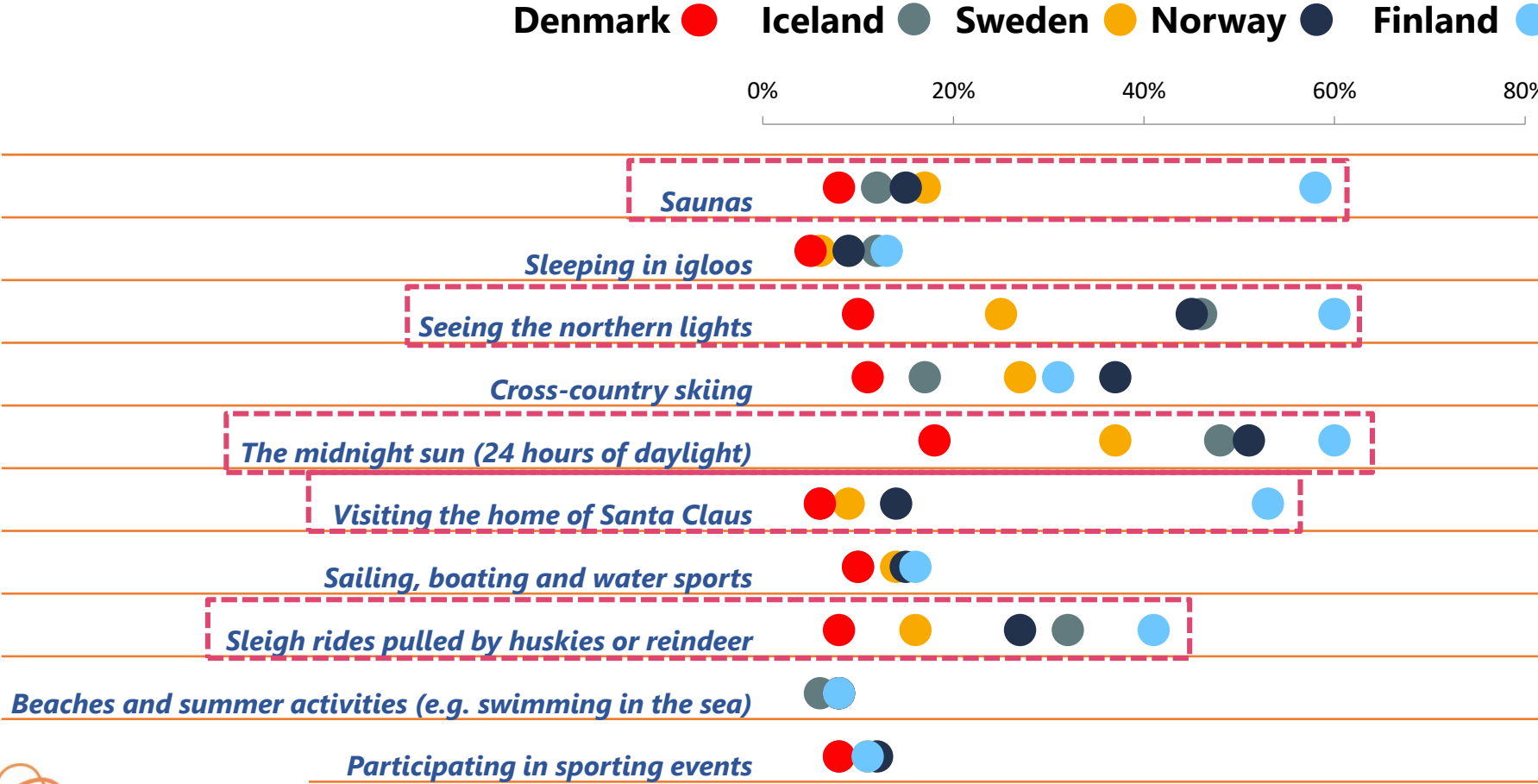


Visit Finland



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



Q15 ACTIVITIES ASSOCIATION

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

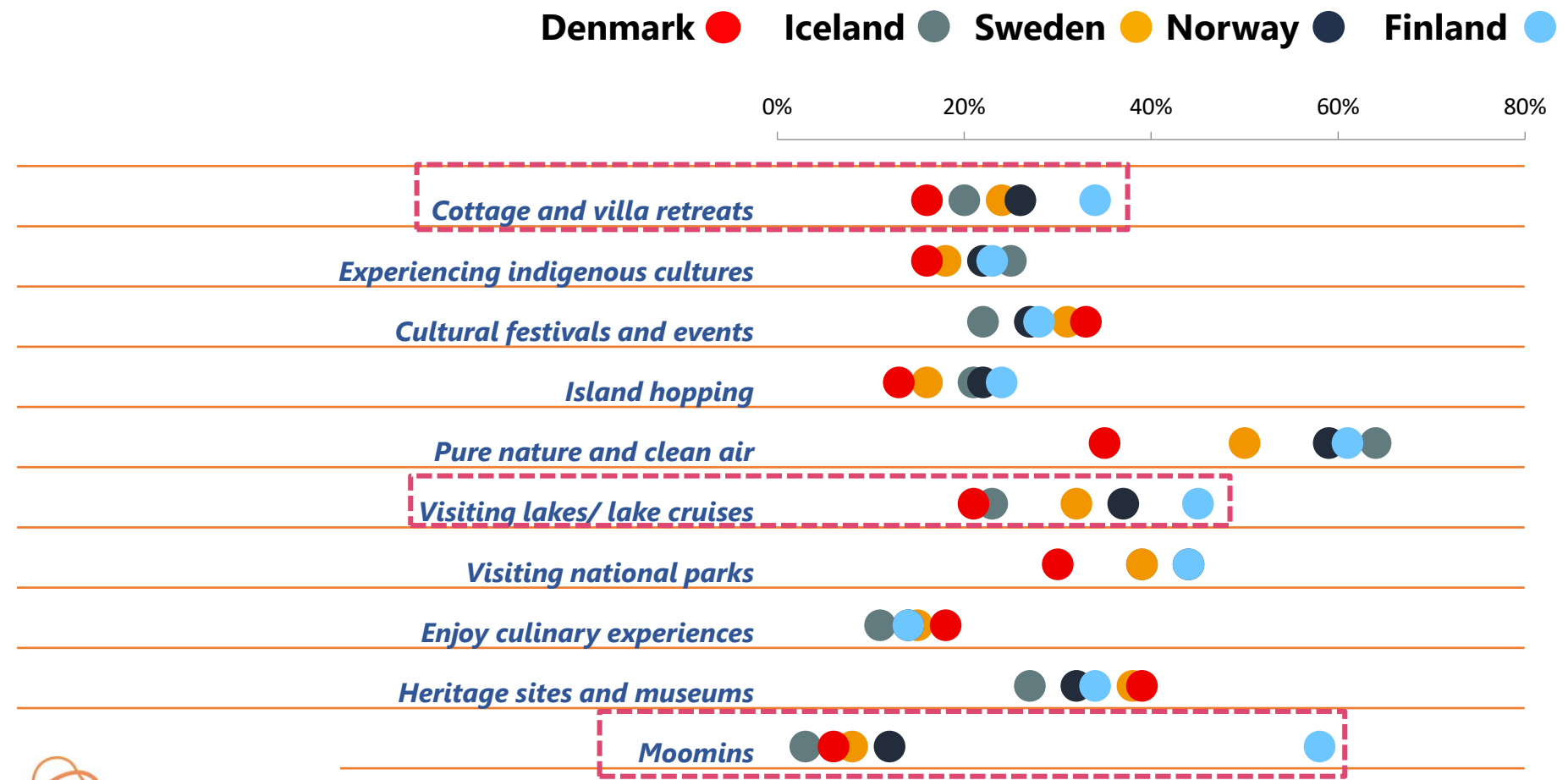


Base: Total Sample (1,000)



Inline with the love for cartoons, the Moomins are also well known and associated with Finland

Activities Associations



Q15 ACTIVITIES ASSOCIATION

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

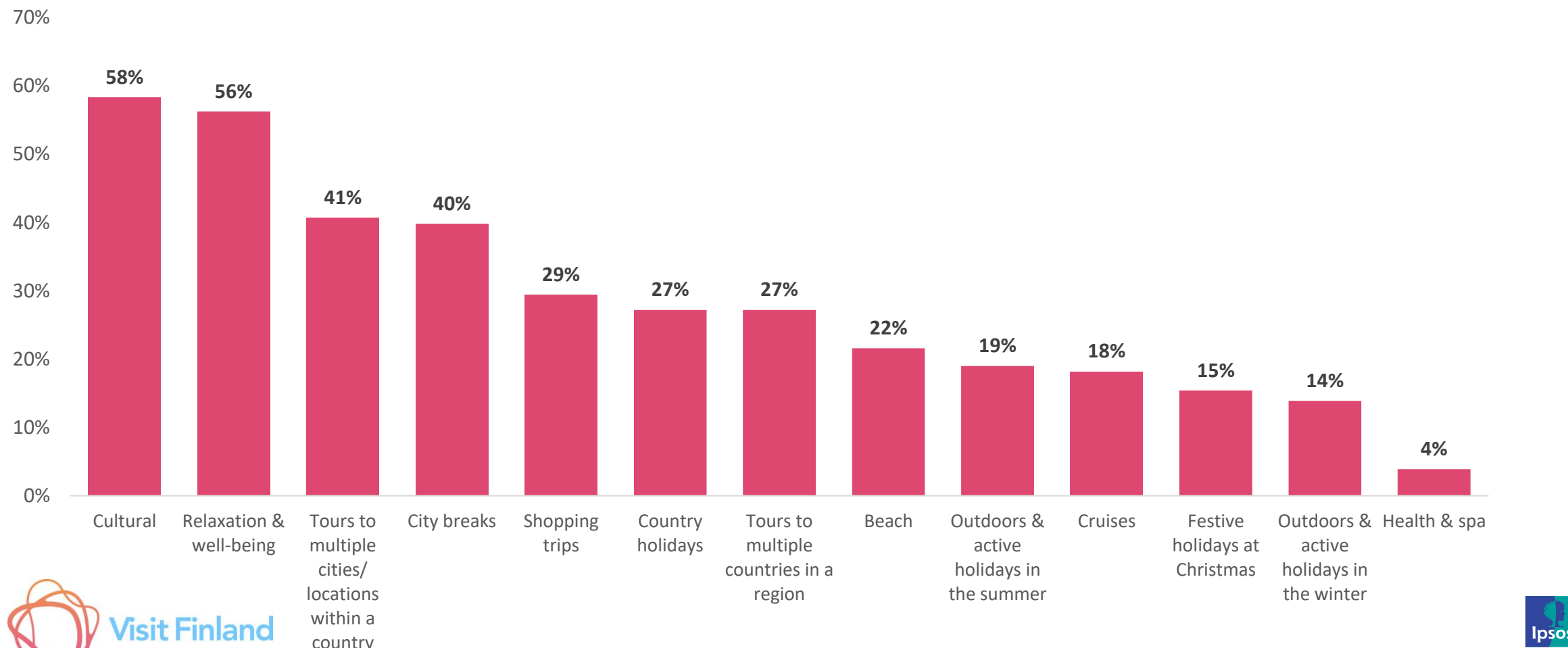


Base: Total Sample (1,000)

# How are people visiting us?

# The Japanese population most prefer cultural and relaxation holidays when they travel abroad

Preferred Holiday Type (Total Sample)



Q22 PREFERRED HOLIDAY TYPE

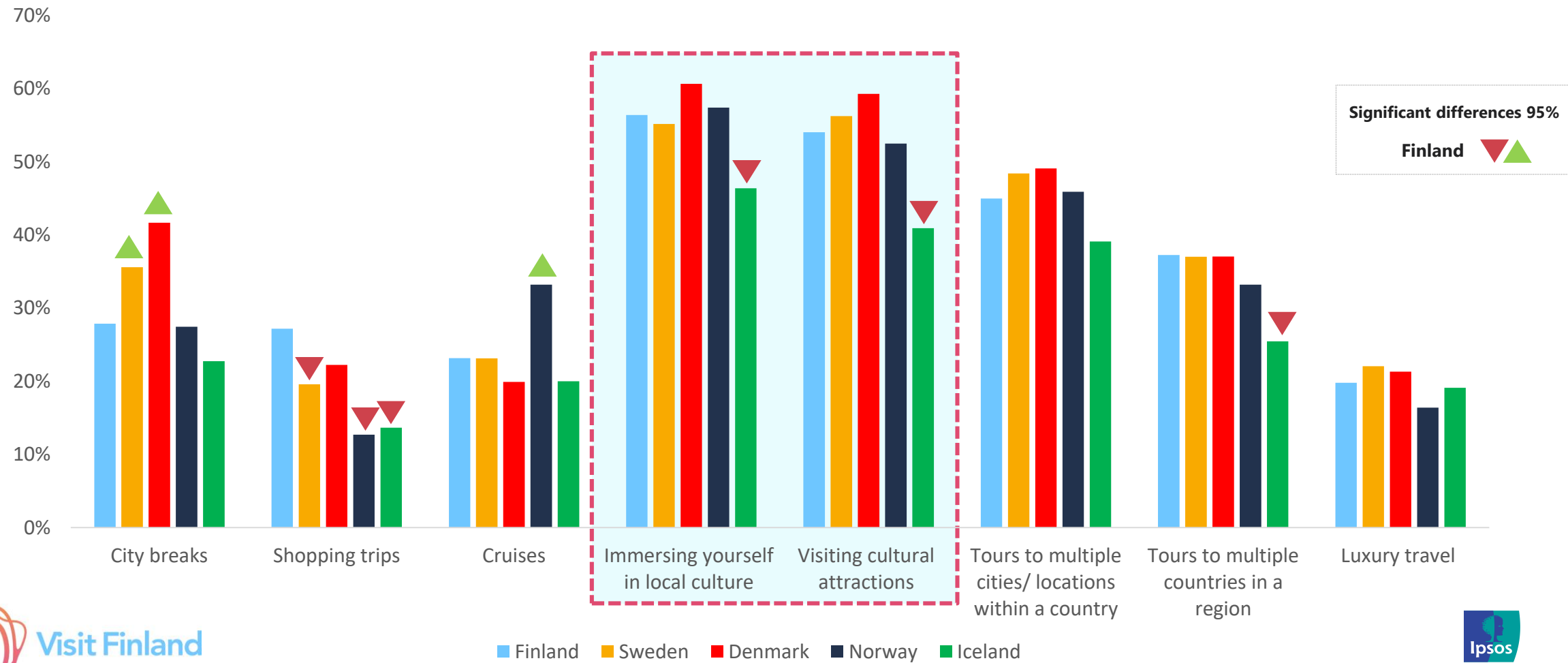
Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?

Base: Total Sample (1,000)



With cultural trips proving popular in the Japanese market, work needs to be done to differentiate ourselves from the rest of the Nordic region

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

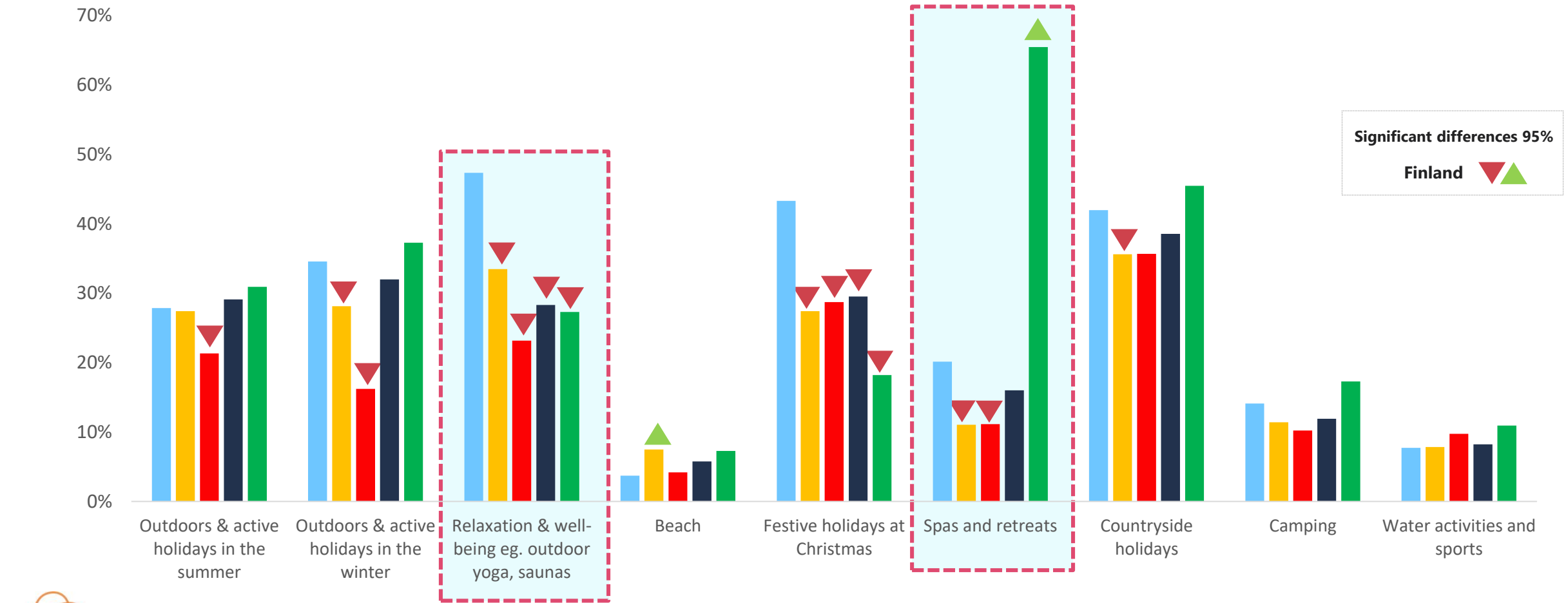
Base: Consideration Set: Finland (298), Sweden (281), Denmark (216), Norway (244), Iceland (110)





Finland is leading on relaxation holidays but have stiff competition from Iceland in terms of spas and retreats

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

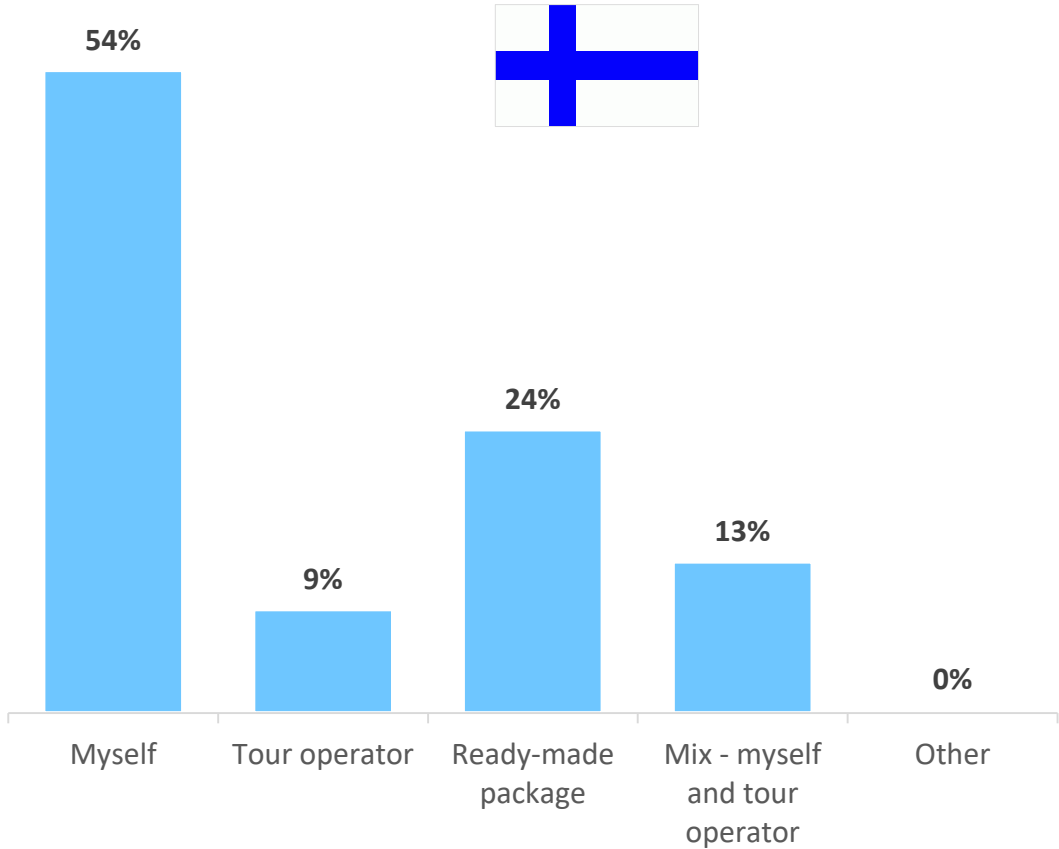
Finland Sweden Denmark Norway Iceland

Base: Consideration Set: Finland (298), Sweden (281), Denmark (216), Norway (244), Iceland (110)

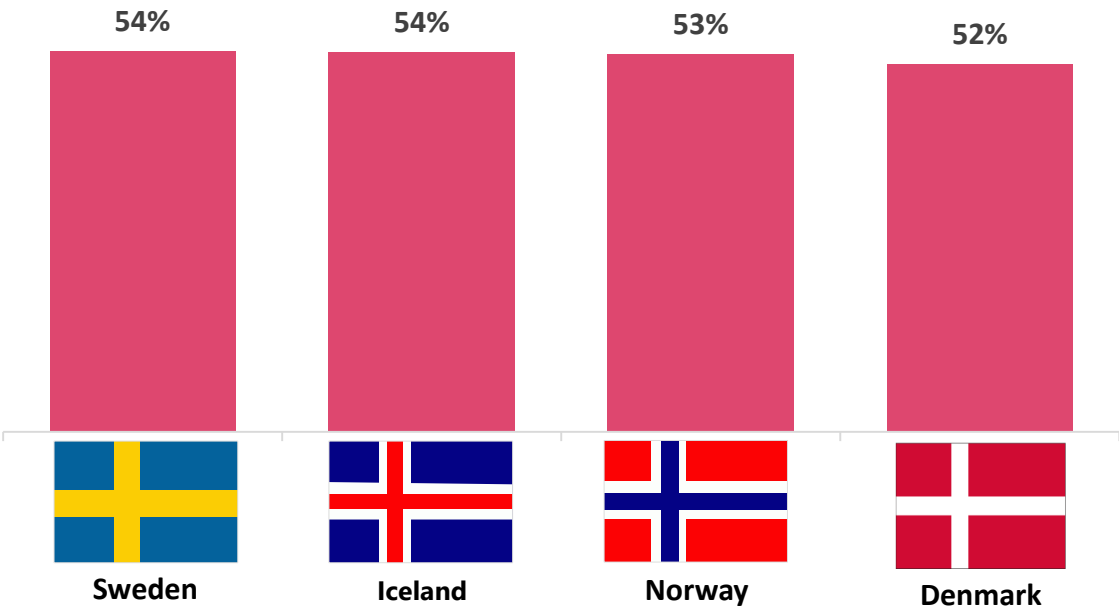


The majority of people in Japan who are considering visiting the Nordic countries plan and make the bookings themselves

Trip Arranging



Book trip myself



Q11 TRIP ARRANGING

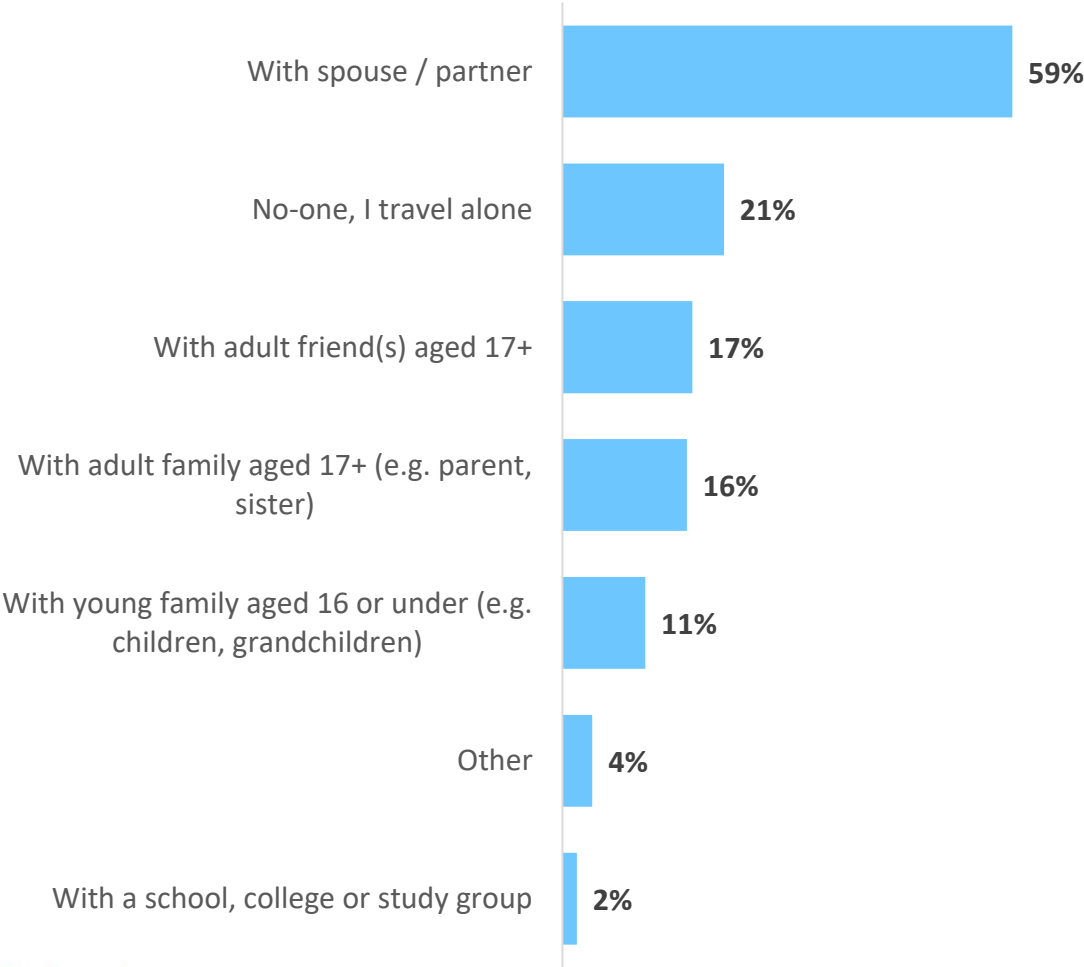
You said that you would consider a holiday or short break to the destinations below, how would you like to arrange your trip there?



Base: Consideration Set: Finland (298), Sweden (281), Denmark (216), Norway (244), Iceland (110)

# Most Japanese people travel with their spouse or partner

## Travel Companion



Visit Finland

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



Base: Total Sample (1,000)

# Summary & Recommendations



## Summary and Final Thoughts.

- In Japan, Finland is the most 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?



**Visit Finland**