

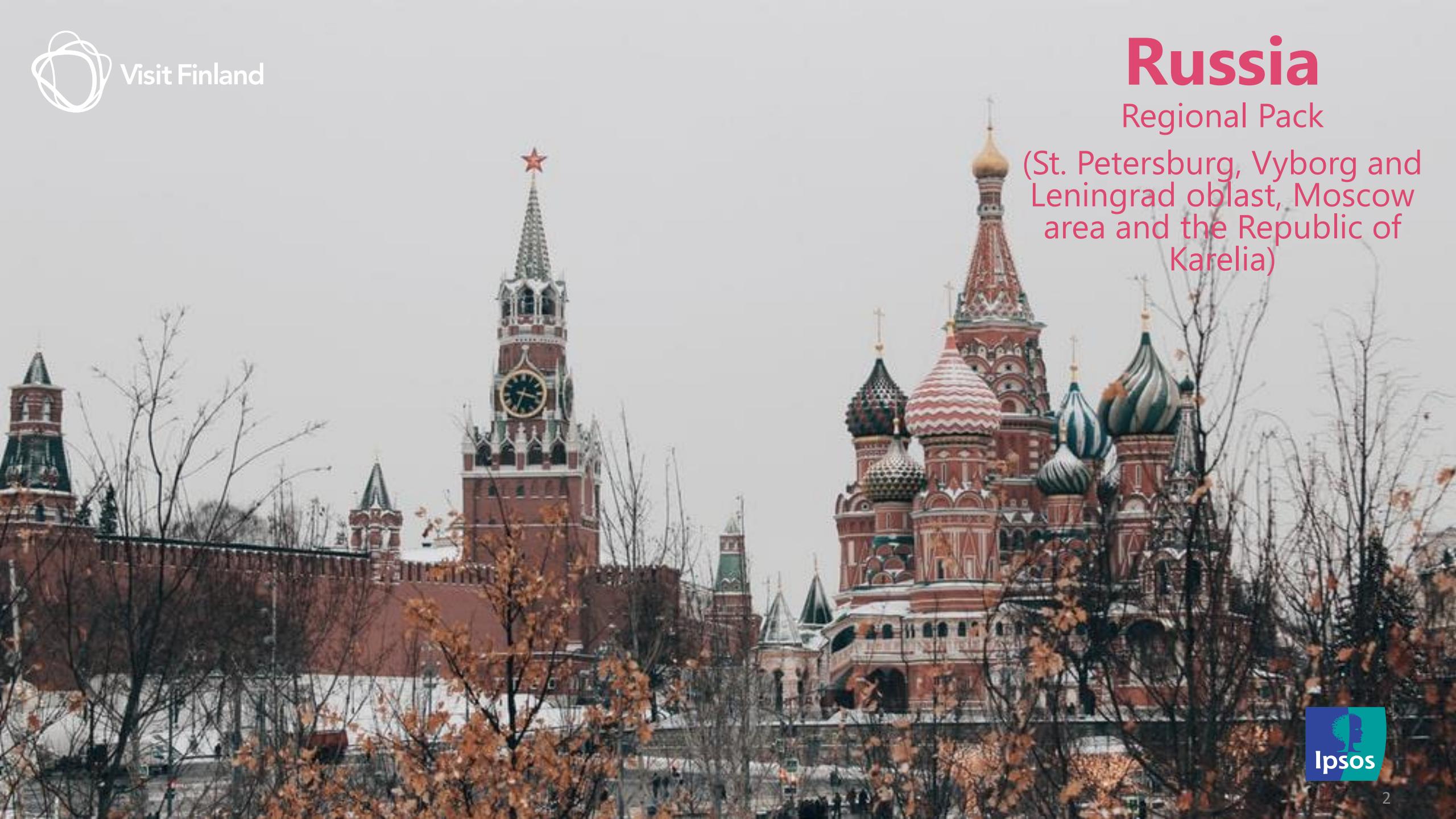


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# Russia

## Regional Pack

(St. Petersburg, Vyborg and Leningrad oblast, Moscow area and the Republic of Karelia)





# Russia Market Context

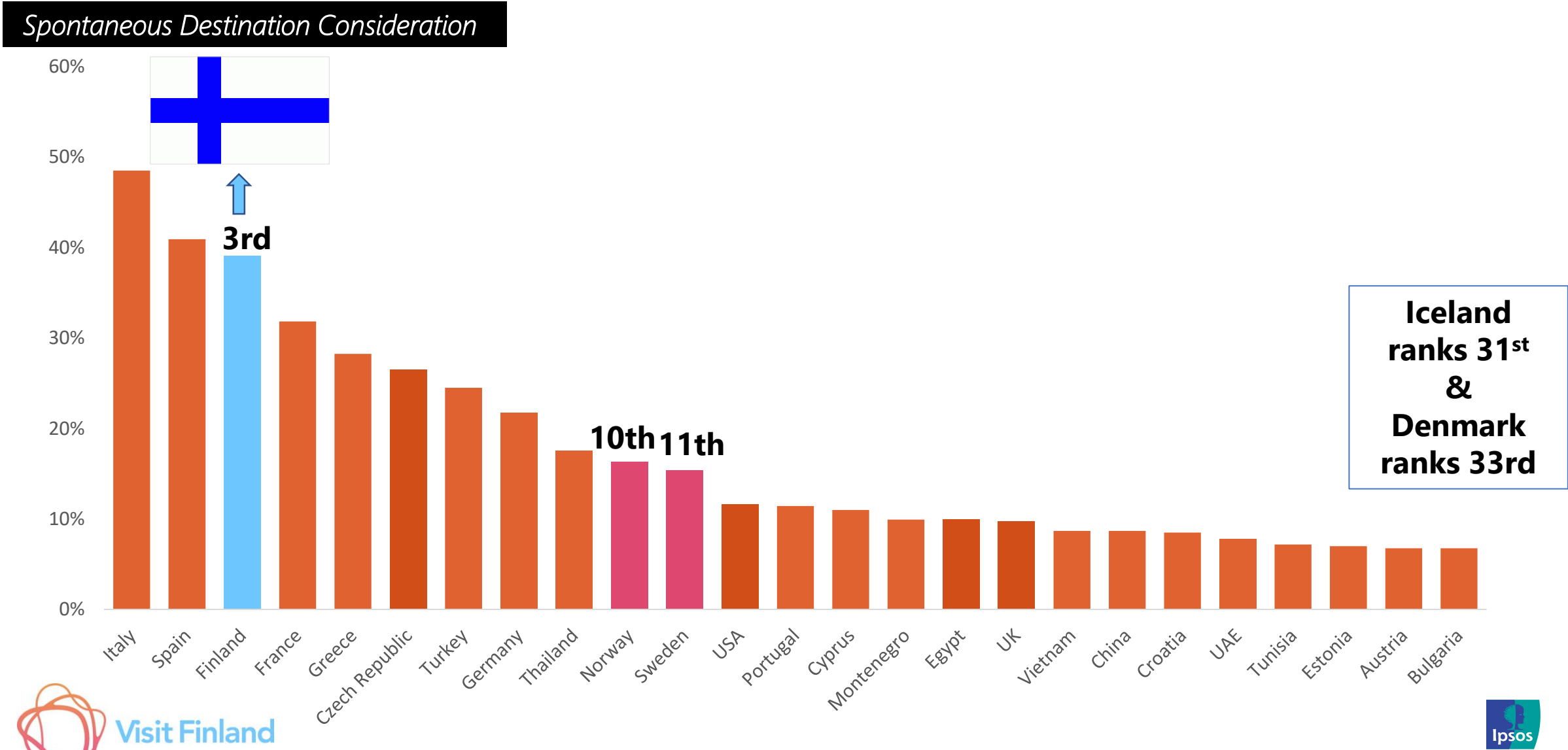
- Russia is the **largest and most important** incoming tourism market for Finland. It's the **leader in overnights, border crossings and money spent** in Finland per annum.
- Russians are **traveling to Finland all year round**, including during the shoulder seasons. They are also traveling to those **rural destinations** which are not yet extremely popular amongst tourists from other countries, such as Eastern Lakeland.
- There is **big growth potential** in next decade as Russians are increasingly **loyal returning customers** to Finland.
- More Russian travellers tend to **book their travels to Finland directly**, providing the opportunity for Finnish companies to increase their direct sales.
- It is important to remember that the Russian market is **very dependent on the rouble exchange rate and the world political situation**, with fluctuations causing changes in demand and spending trends.



# 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 ranks 3<sup>rd</sup>.



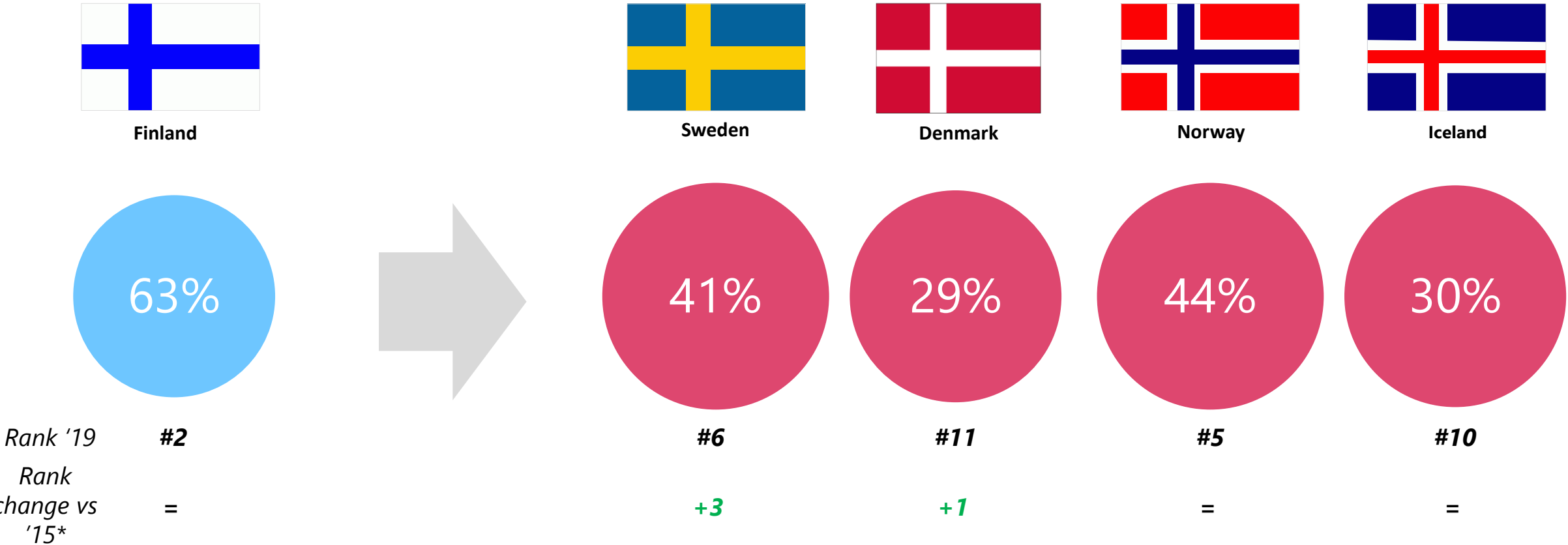
**Q2. SPONTANEOUS CONSIDERATION DESTINATION**

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 (1,200)

When prompted, consideration of Finland as a holiday destination is high, and considerably higher than our Nordic neighbours, although there has been a strong improvement in the ranking of Sweden.

Total Consideration



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Q7. PROMPTED CONSIDERATION DESTINATION

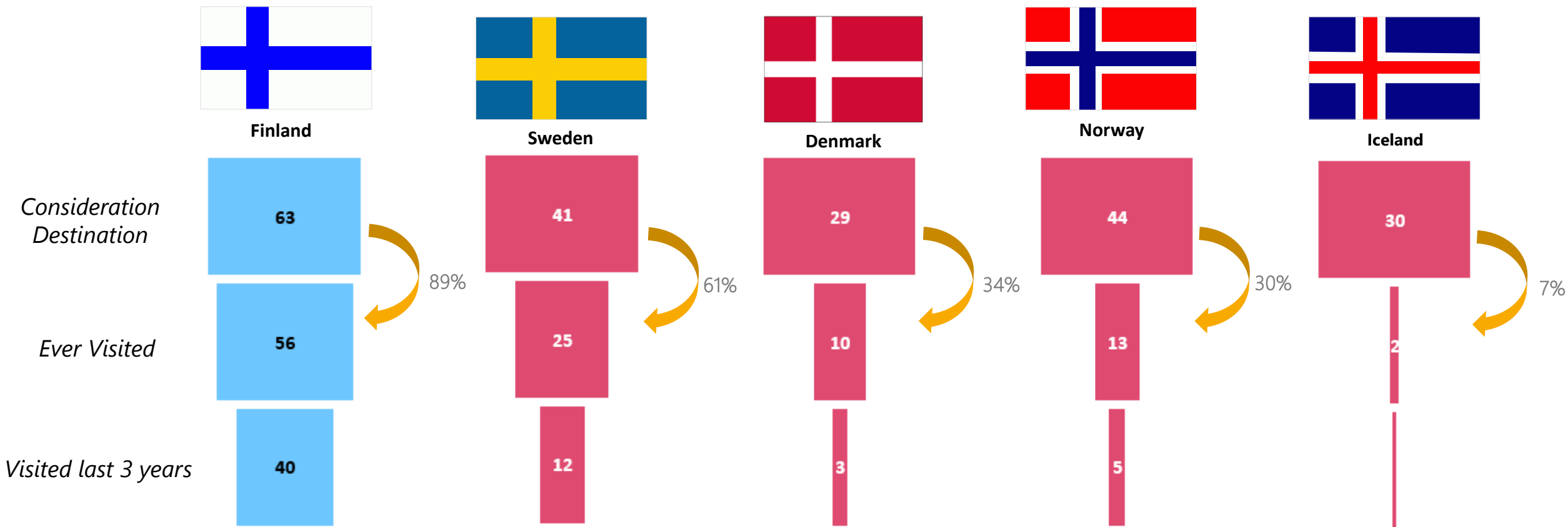
Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

\*=different methodology and consideration set used



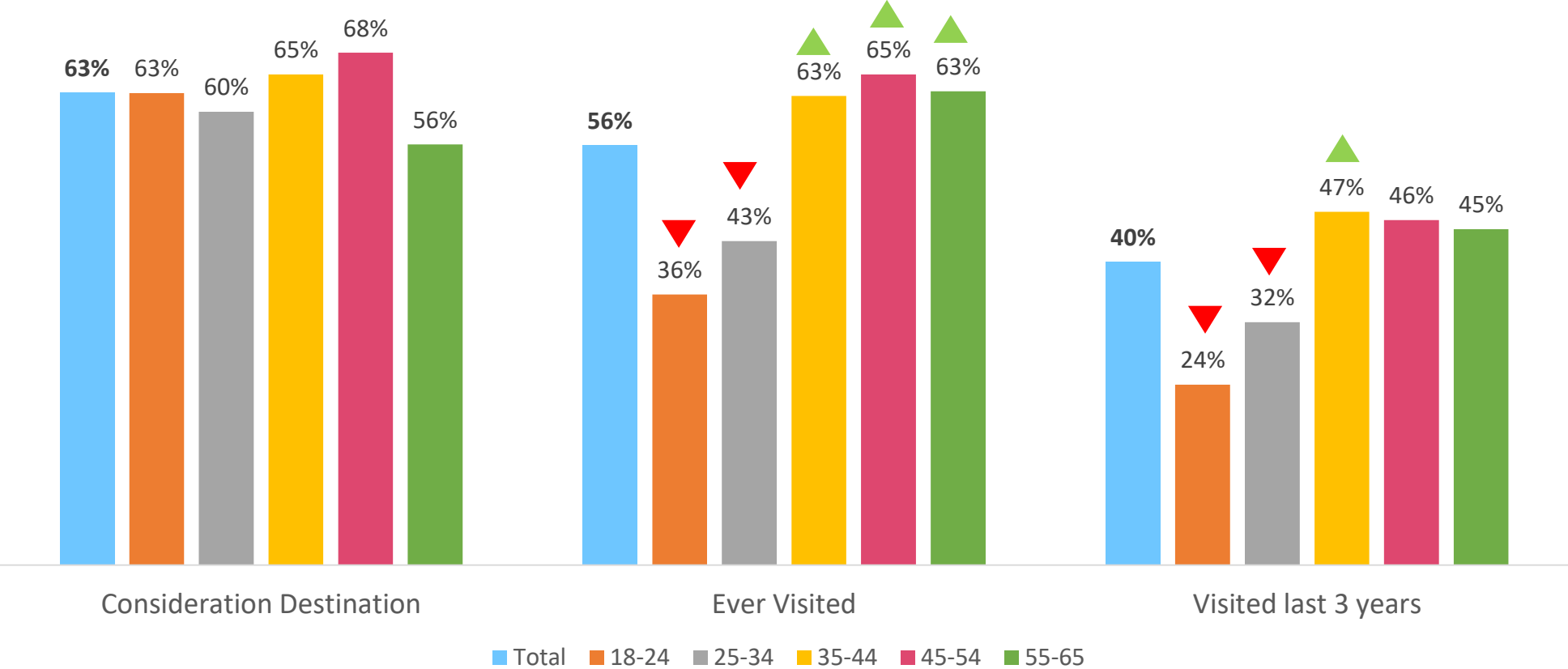
Close to two-thirds of Russians would consider travelling to Finland and the visitation conversion is very high, the challenge is to boost consideration as this strongly drives visitation.

Consideration to P3Y visit funnel



Demographically, there is no differentiation among ages as to those that consider Finland, but visitation is driven by the older age groups. The challenge is to attract young Russians to Finland.

Age profile



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

Sig diff at 95%  
vs Total Sample

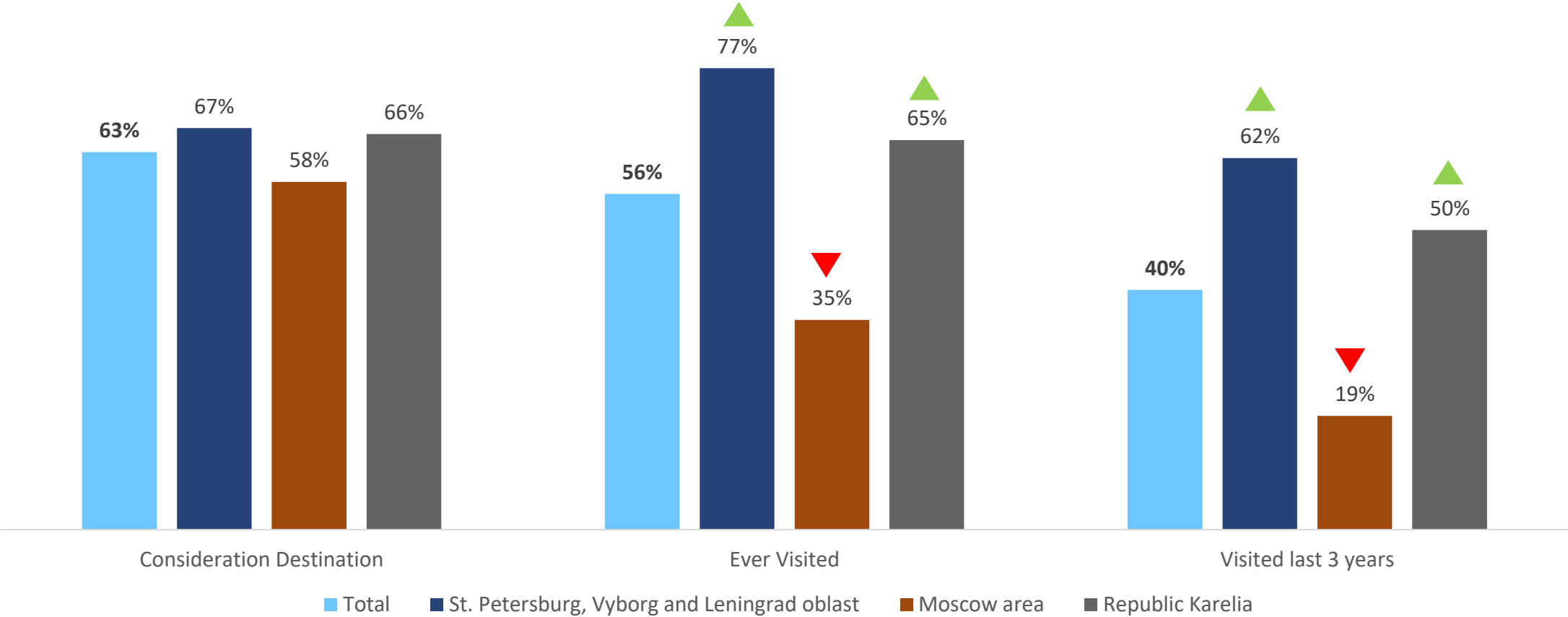
Base: Total Sample (1,200)





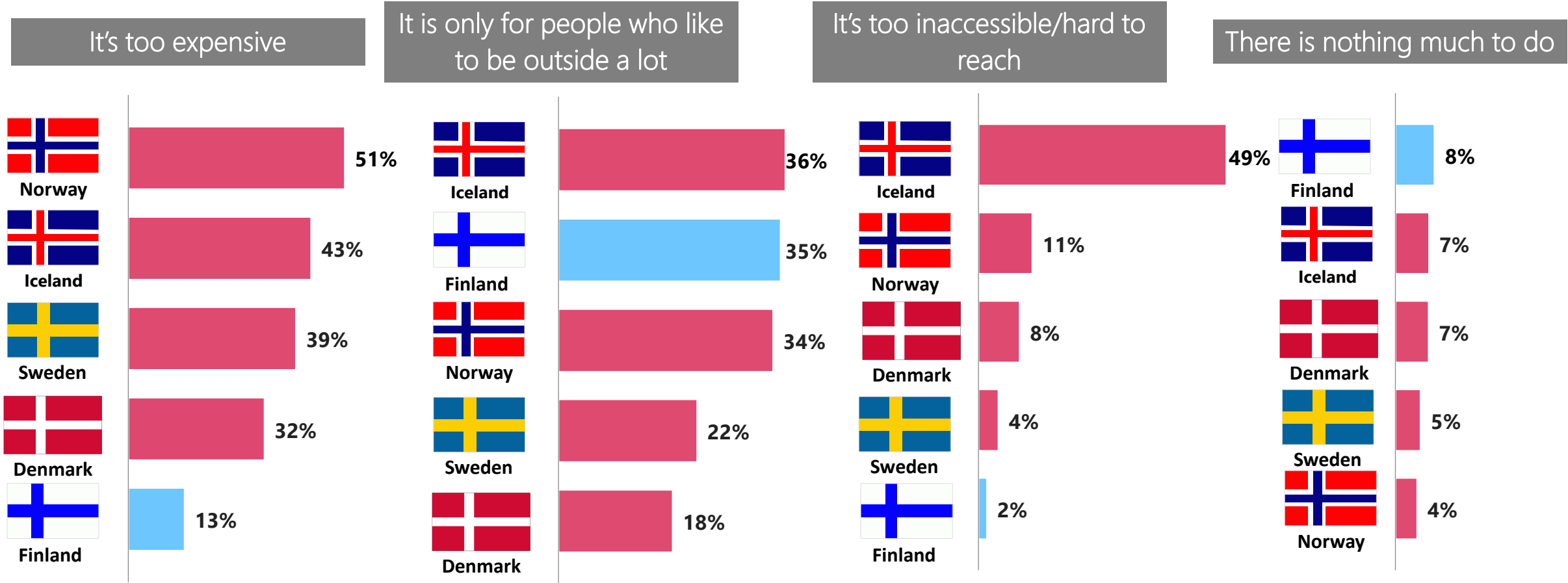
Visitation is driven by the regions boarding Finland, where people find the country easy to access.

Regional Differentiation



Compared to its Nordic competitors, Finland's only perceived barrier for Russians is that it is only for people who like to be outside a lot.

Barriers to visit



Q14 BARRIERS

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



Base: Total Sample (1,200)

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



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## Spontaneous Impressions – Competitors



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.



Finland stands out as being seen as a hospitable, family-friendly destination that is a great for a short break and which is easy to find information about online.

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

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

— Finland — Sweden — Denmark — Norway — Iceland

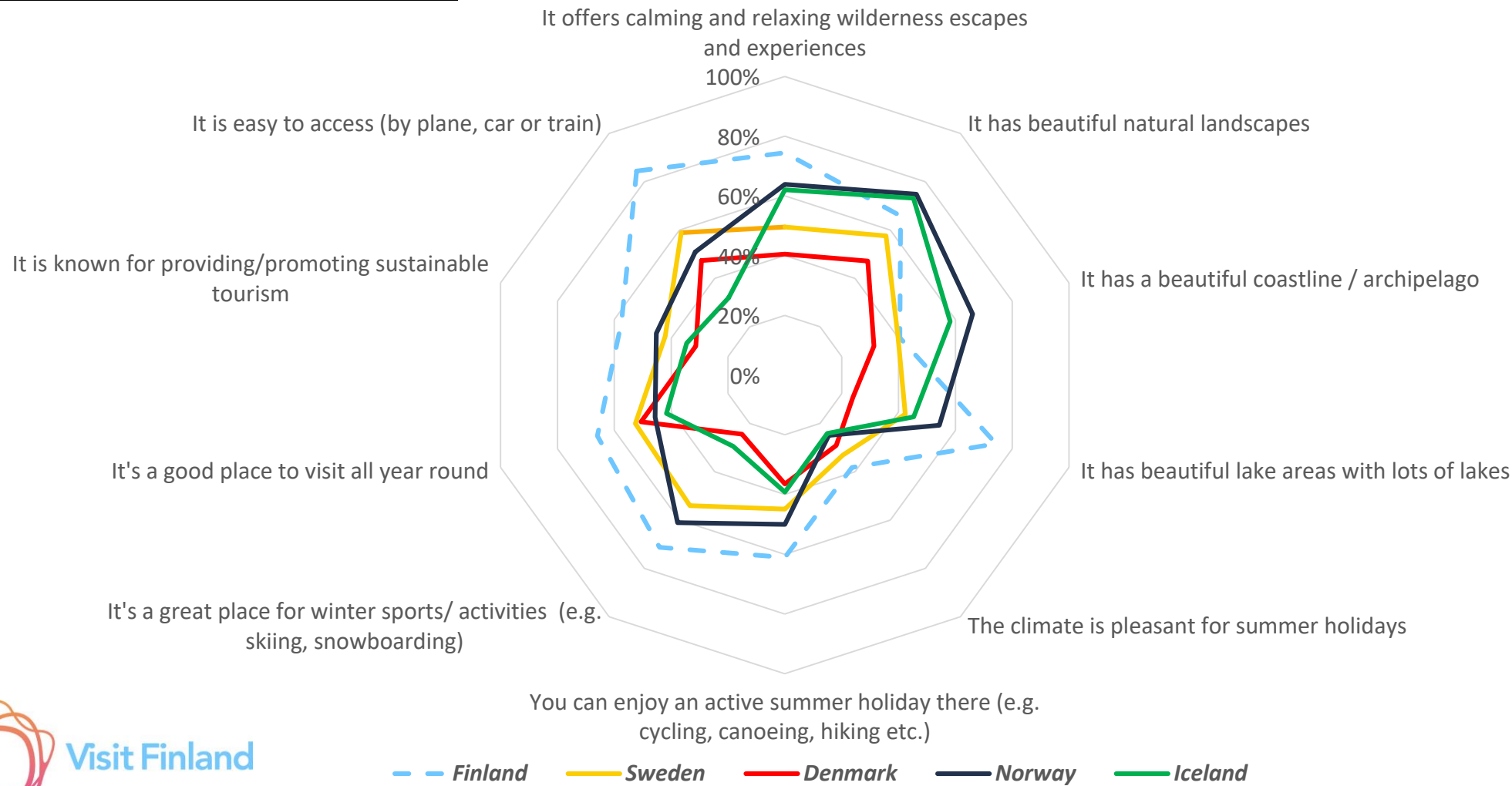


Base: Total Sample (1,200)



# Strong knowledge of Finland in Russia drives strong image associations, most notably for lakes and accessibility

## Image Associations (Total Sample)



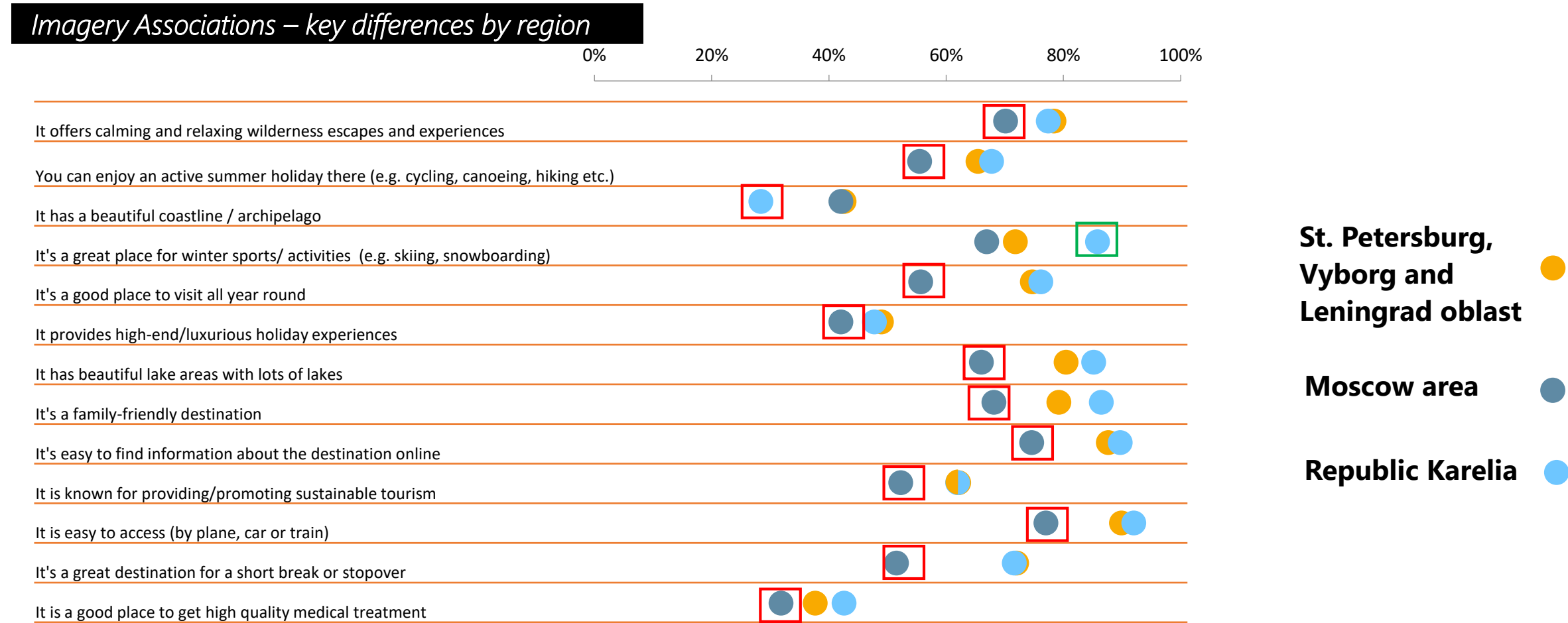
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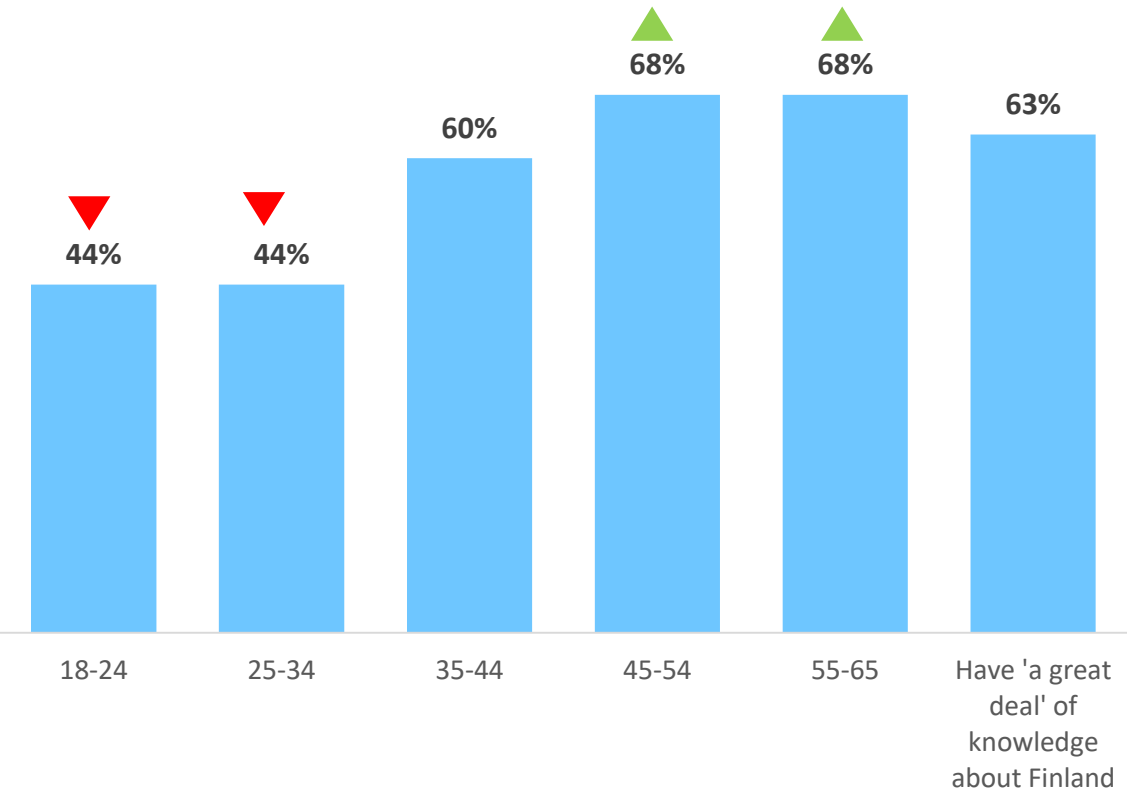
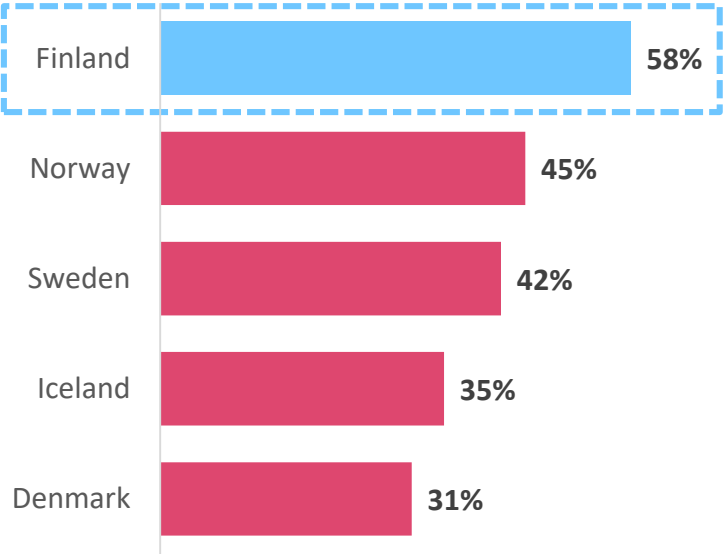


There are some differences in perceptions of Finland when we break it down by region, with Moscow, the most distant region, having weaker associations on many statements.



Finland has the strongest association with being sustainable in Russia, which is considerably higher among the older age groups.

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



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Q23 SUSTAINABILITY  
In your opinion, what is meant by a 'sustainable' travel destination?

Sig diff at 95%  
vs Total Sample



Base: Total Sample (1,200)





### Sustainable travel destination - OEs

*Destination is in demand among different categories of tourists all year round. Offers a variety of type of holiday*

*A well-organized  
tourist  
destination*

Where  
tourists go  
constantly.

*A constant flow  
of tourists,  
regardless of the  
season*

*A well-developed tourist infrastructure. The tourist season lasts almost all year.*

*The country is completely safe for tourists, with a constant flow of tourists, the presence of trails for hiking, a sufficient number of places for relaxation, well-developed infrastructure of the country*

*A steady stream of  
tourists at any time of  
the year*

*Tourist destination for which there is a demand at all times.*

*A country, a city, an area where tourists are happy to come. And interest in the site is increasing every year*

*There is enough entertainment, hotels and restaurants that attract tourists of all ages and interests, and at the same time, for all of these features you can easily, quickly and reliably find enough information about them on the Internet*

*Prepared, the waste infrastructure for independent tourism. Great choice of hotels, entertainment and transport.*

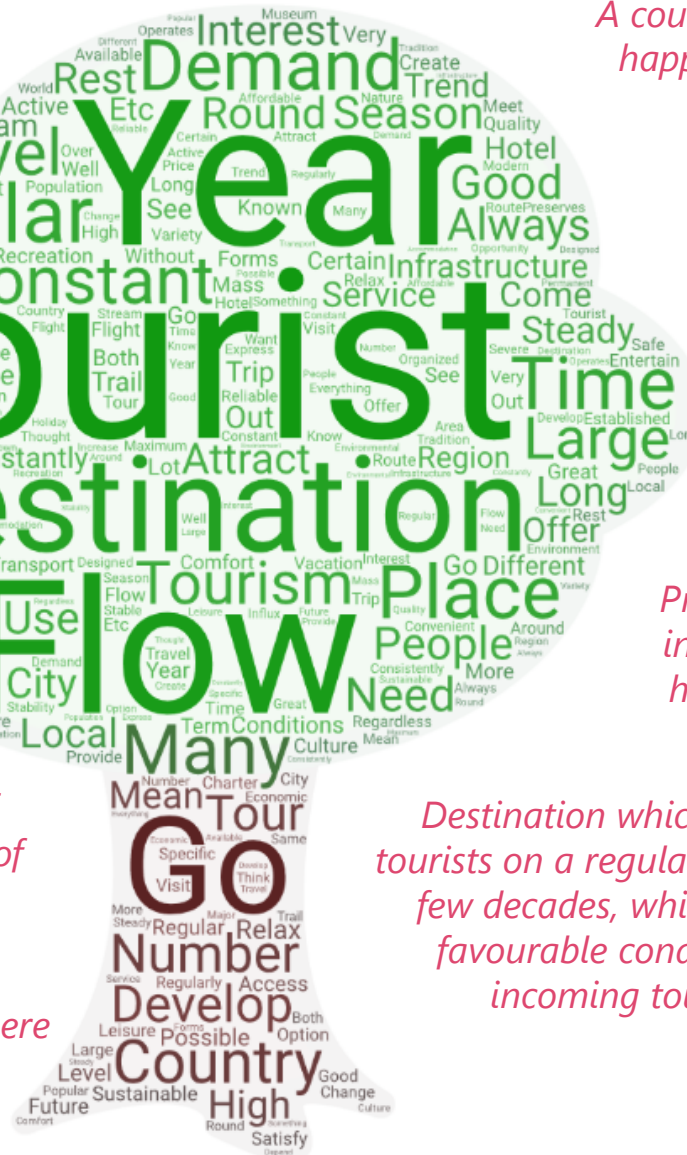
*Destination which is chosen by tourists on a regular basis in the last few decades, which has created favourable conditions for the incoming tourist flows*

*Annual relentless  
flow of tourists to the  
region*



## Q23 SUSTAINABILITY

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



# Activity Associations



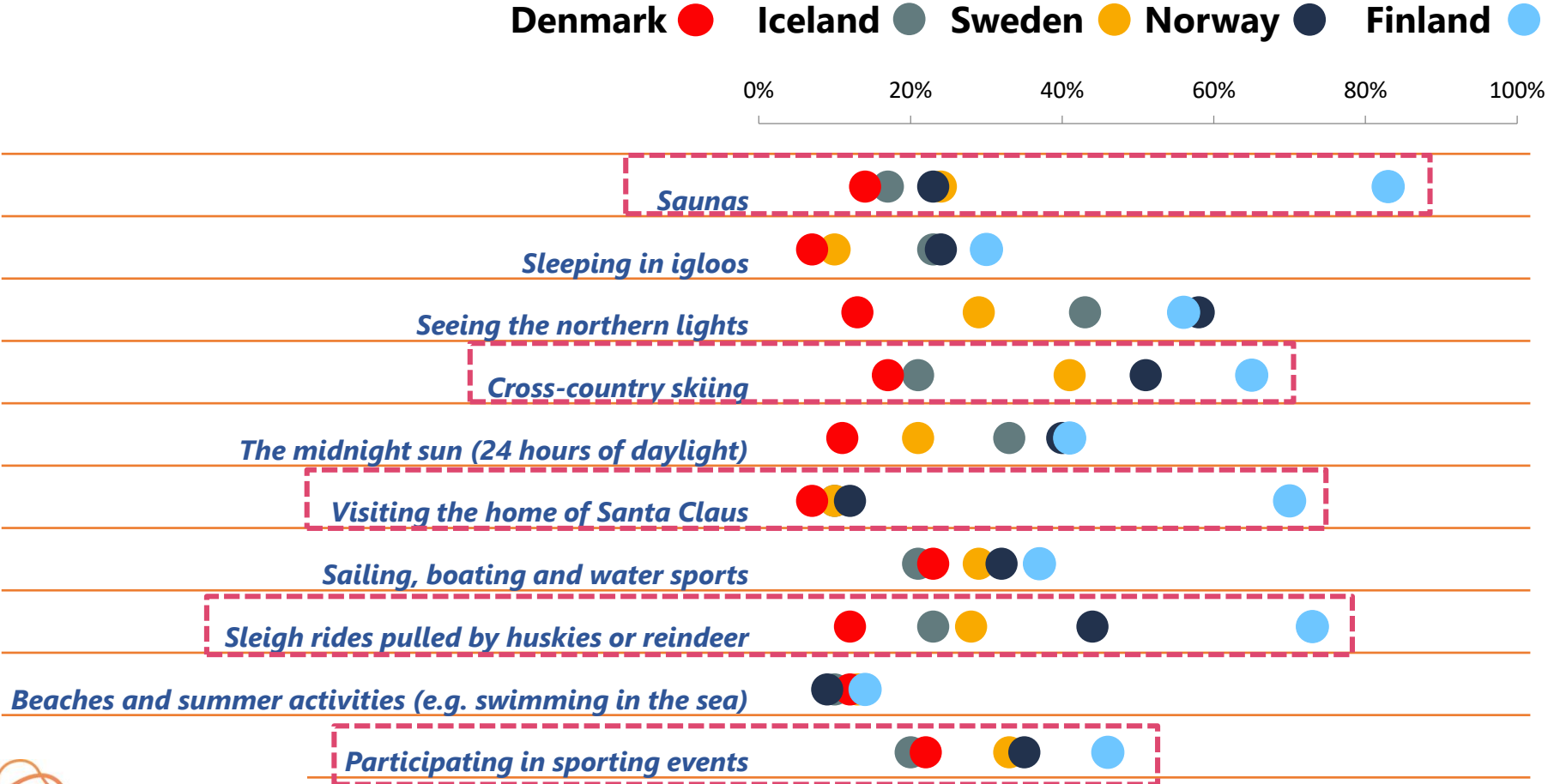
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In terms of activities and experiences associated with Finland, saunas, skiing, Santa, sleigh rides and sporting events are strongly linked to Finland in the Russian population's minds.

Activities Associations



Q15 ACTIVITIES ASSOCIATION

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

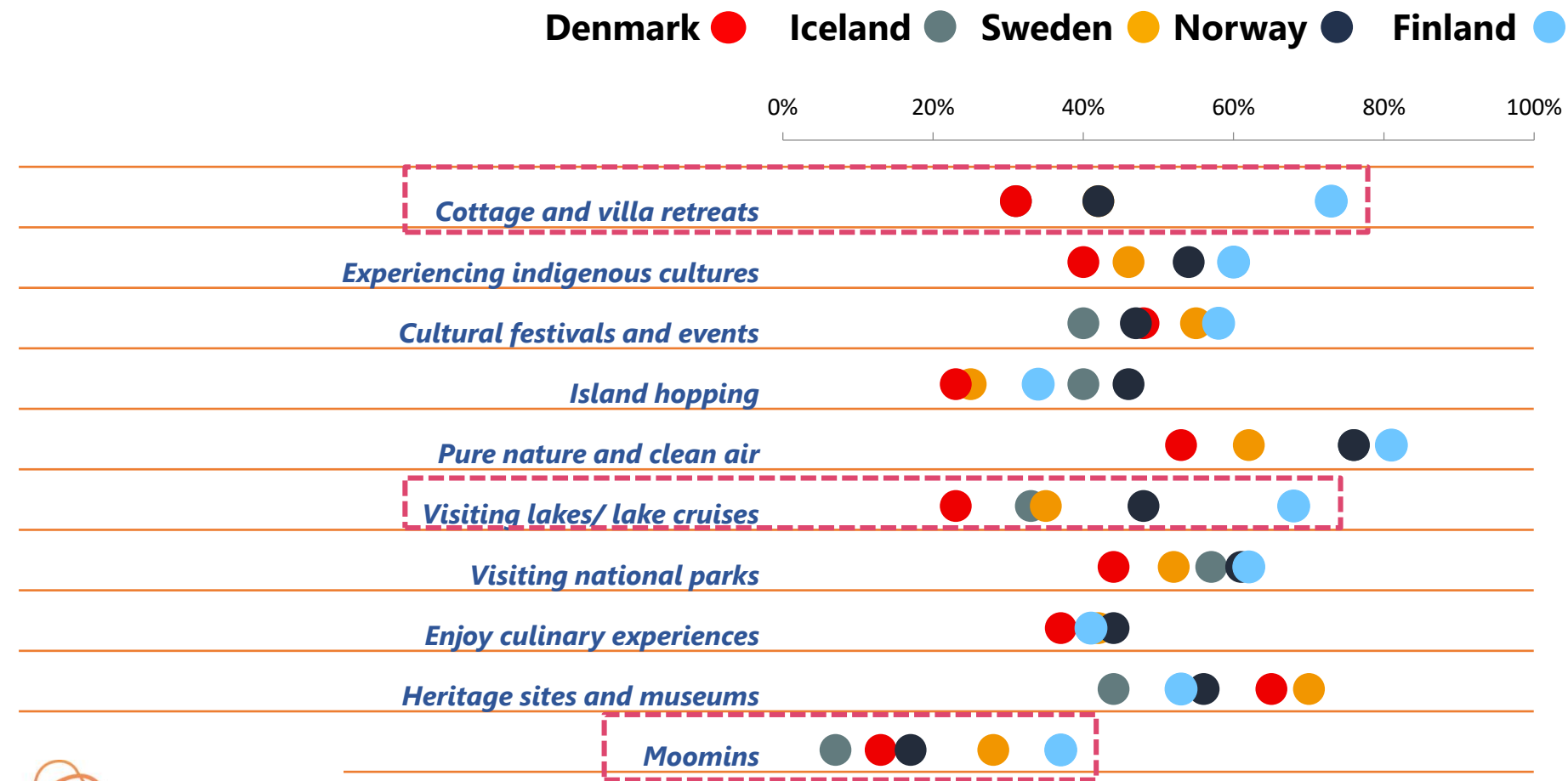


Base: Total Sample (1,200)



Russians also closely associate cottage retreats and visiting lakes with Finland. Moomins are also correctly linked to Finland.

Activities Associations



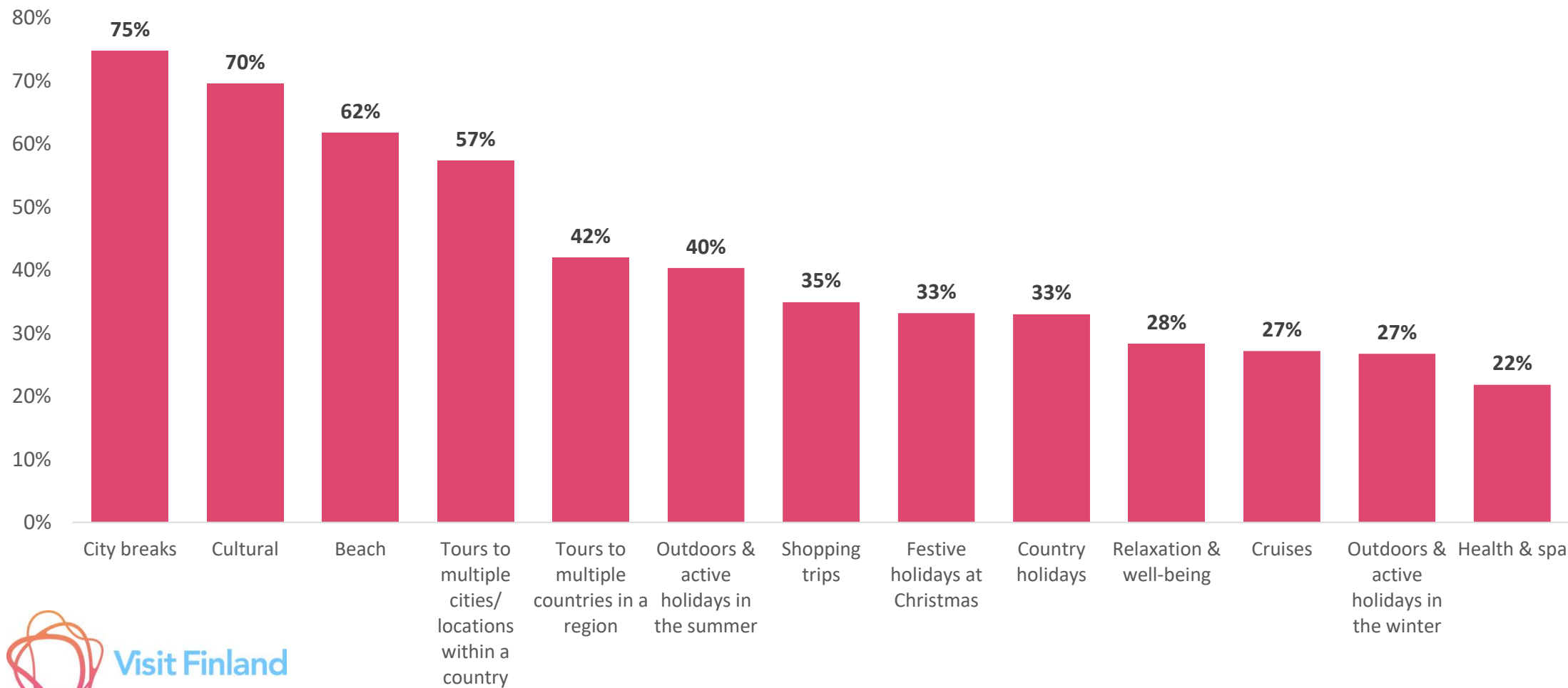
Q15 ACTIVITIES ASSOCIATION  
Do you associate any of these holiday destinations with the following activities and experiences?



# How are people visiting us?

The Russian population prefer city break, cultural and beach holidays.

Preferred Holiday Type (Total Sample)



Q22 PREFERRED HOLIDAY TYPE

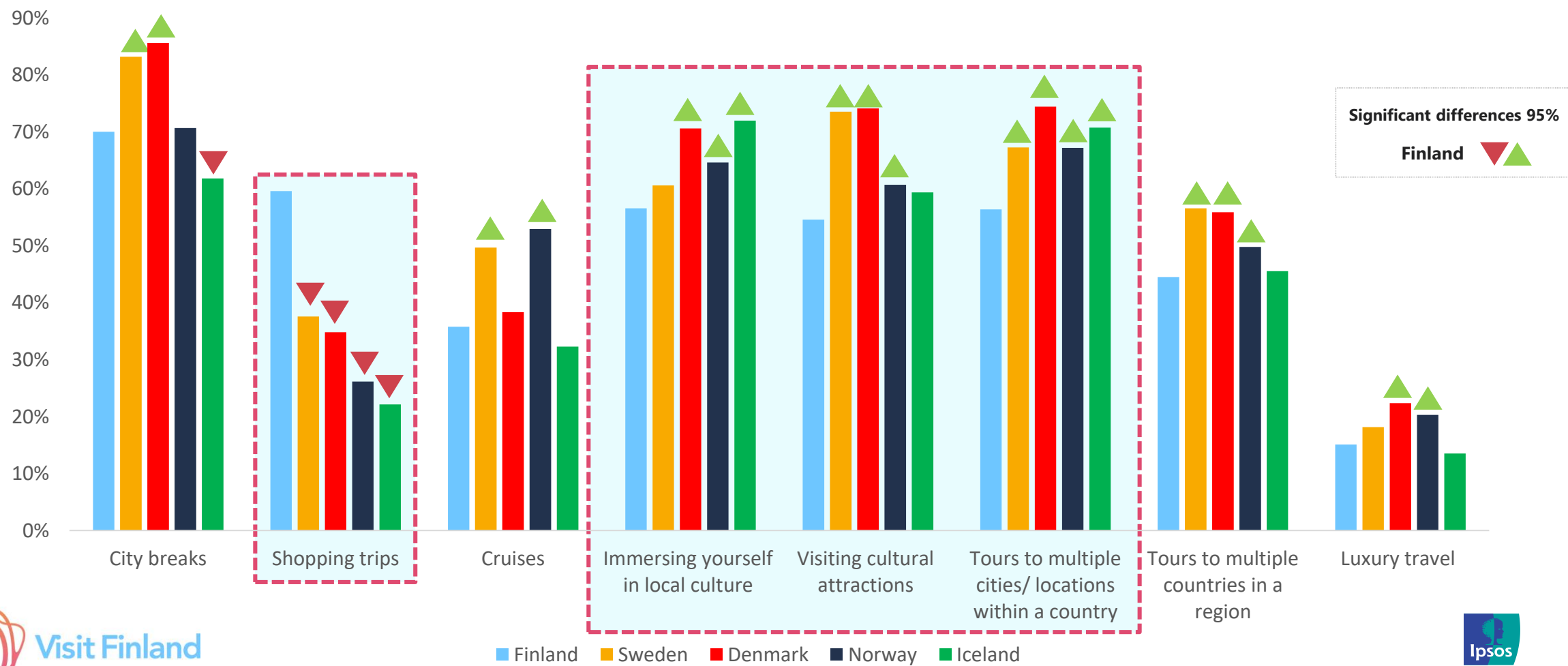
Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?



Base: Total Sample (1,200)

Finland holds an advantage as being a country strongly considered with holidays focused around shopping. Work needs to be done to highlight the cultural aspects of a trip to Finland, where our competitors currently hold an advantage.

*Holiday Type Consideration*

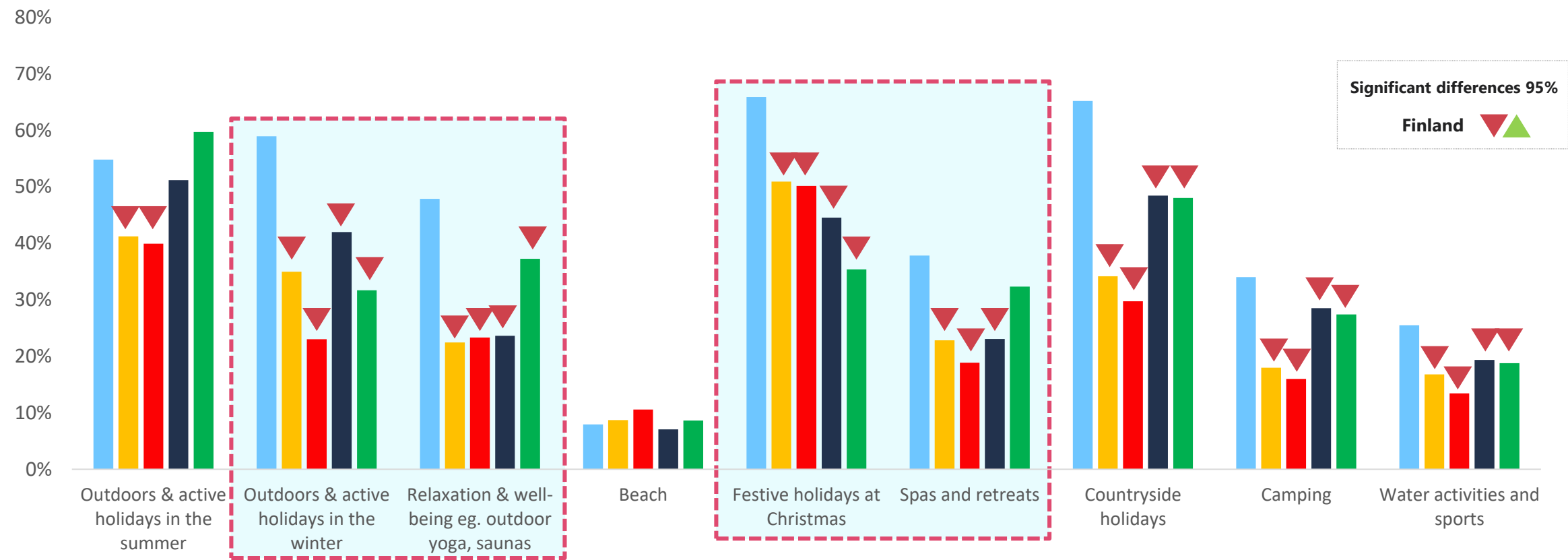


**Q12 CONSIDERATION HOLIDAY TYPE**  
Which of the following types of holiday would you consider for the following destinations? Please select all that apply



Finland is leading on active and festive winter holidays, as well holidays focusing around spas and relaxation. These are all activities strongly associated with Finland and should be promoted as a USP.

Holiday Type Consideration



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Q12 CONSIDERATION HOLIDAY TYPE

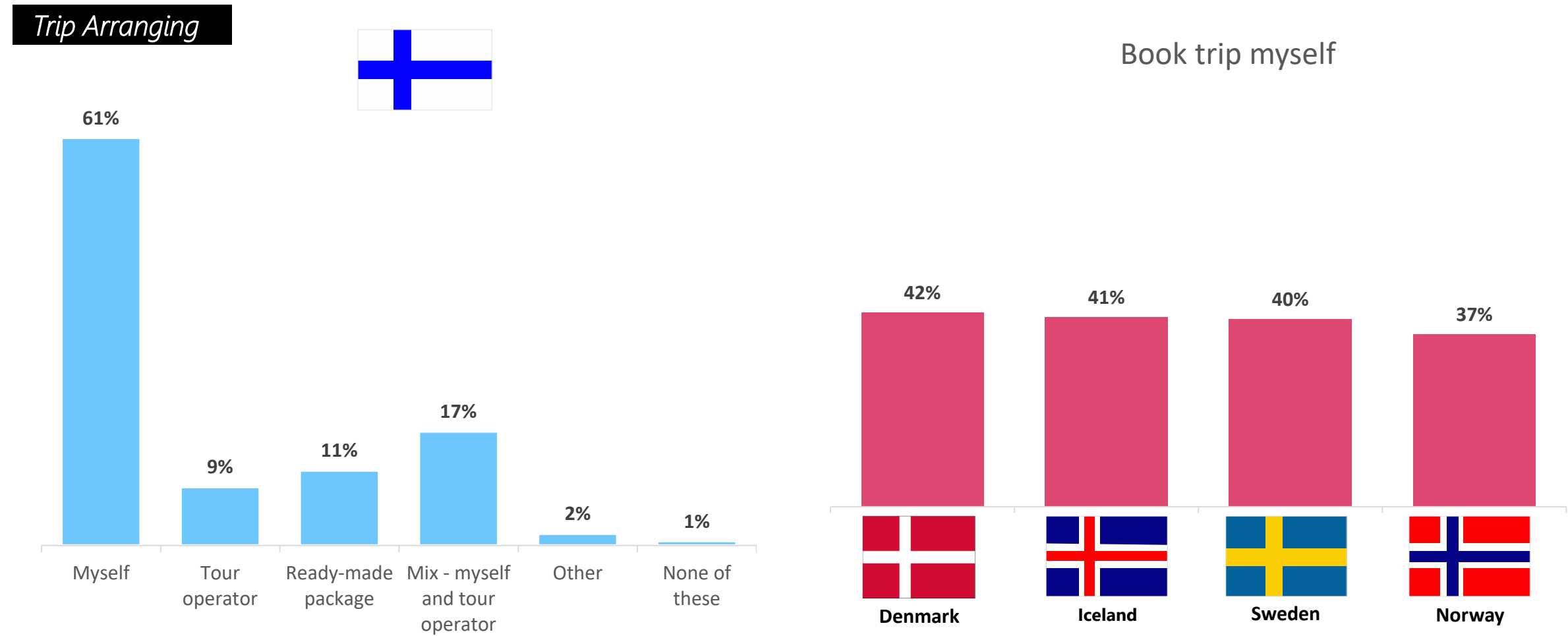
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Finland Sweden Denmark Norway Iceland

Base: Consideration Set: Finland (894), Sweden (495), Denmark (313), Norway (512), Iceland (325)

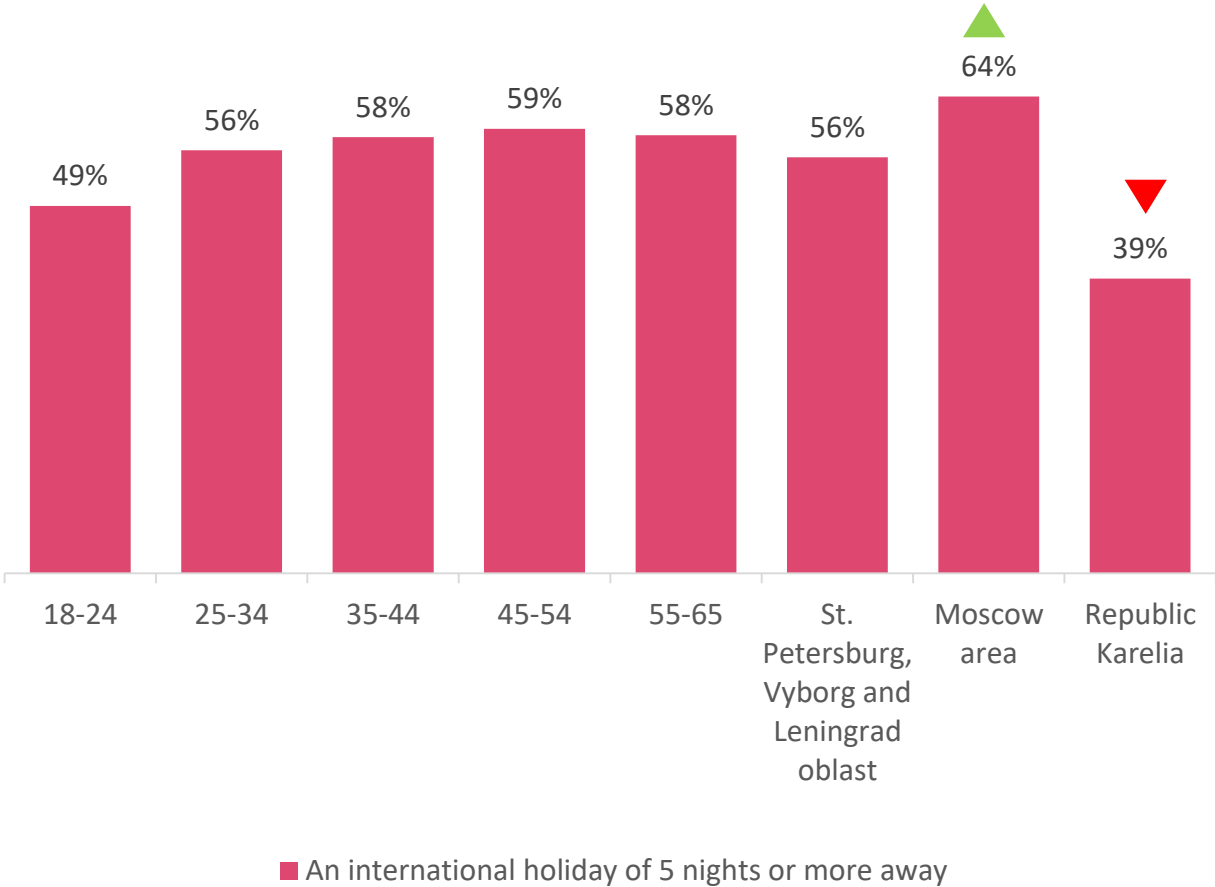
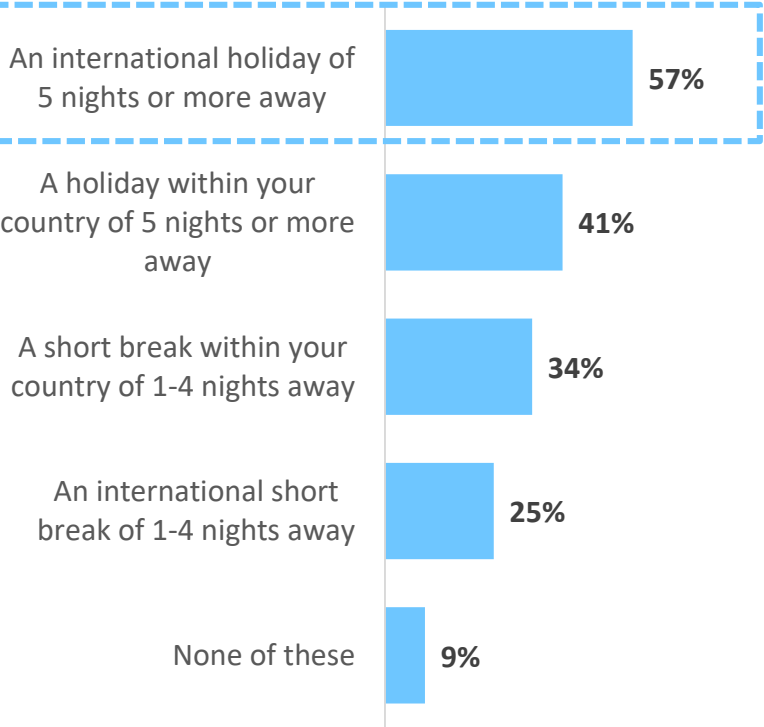


3 in 5 Russians who are considering visiting Finland, plan and make the bookings themselves. This is considerably higher than for the other Nordic nations.



A majority of the Russian population have been on a long international trip in the last year. Those residing in the Moscow area are more likely to take these trips.

Past Year Holiday



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Q20 PAST YEAR HOLIDAY

Which of these types of holiday or leisure trip have you taken over the past year?

Sig diff at 95%  
vs Total Sample

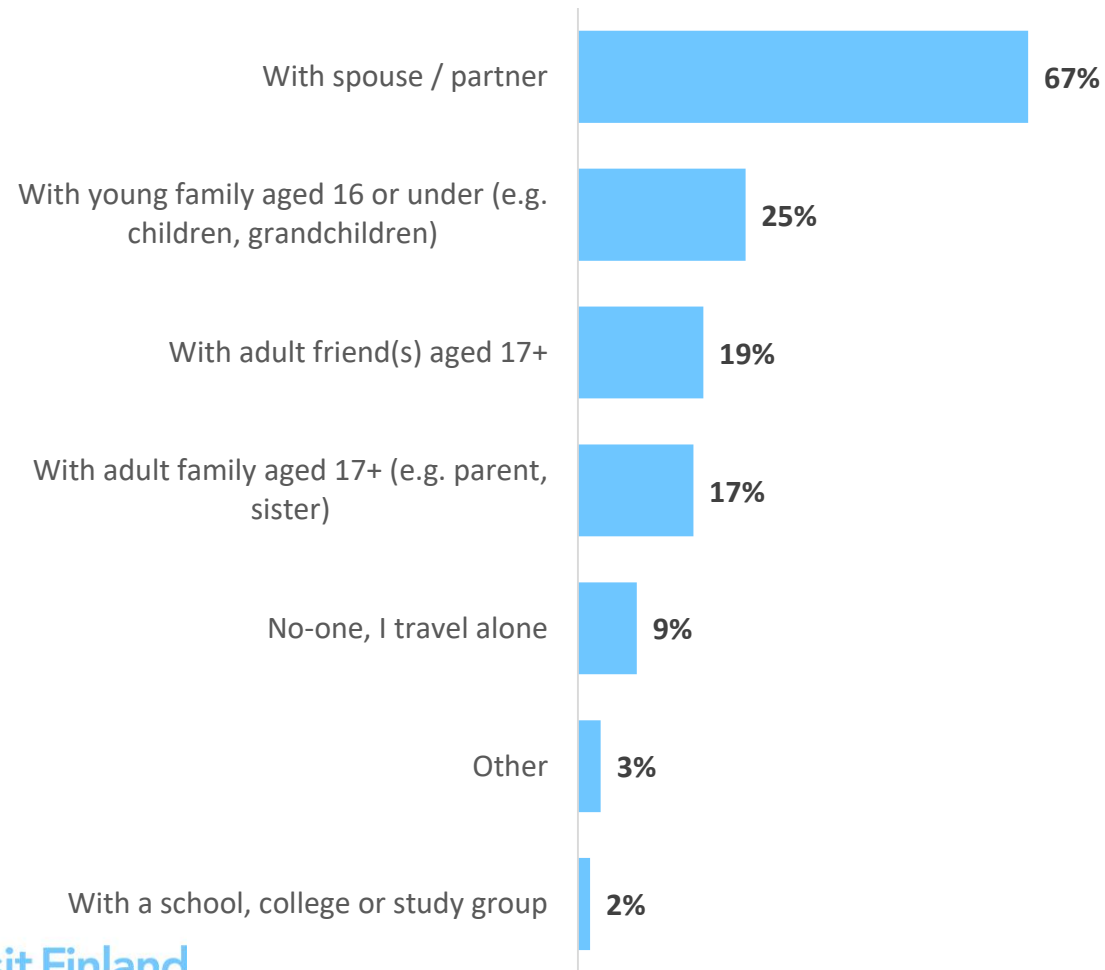


Base: Total Sample (1,200)



# Two-thirds of Russians 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 (1,200)



# Summary & Recommendations

## Summary and Final Thoughts

- Russia is a strong market for Finnish tourism. Consideration of Finland as a holiday destination, although stable since 2015, is much higher than our Nordic neighbours and is only behind Italy and Spain in terms of spontaneous consideration.
- The high consideration is driven by strong knowledge about Finland, resulting in a high conversion of considerers to visitors. Amongst those with strong 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 Russia.
- Visitation is driven by older Russians and those residing in the border regions. The challenge is to appeal to younger Russians, and especially Muscovites, as they are more likely to take a long international break.
- The natural aspects of Finland resonate well in Russia, with our main strength lying in the lakes. There is the opportunity to better promote the Finnish coastline to attract these nature lovers. Tying this into the offering of wilderness escapes and experiences may be a route to do this, especially as we currently hold an advantage here.
- Activities strongly associated to Finland are mainly Christmas related, although saunas and cottage retreats are also strongly linked to Finland. Moomins are also linked to Finland but with lower awareness in the Russian market – consider pushing these further in Russia to attract more families, especially as Finland is already viewed as a family friendly destination.
- As a market, Russia is particularly keen on city breaks and cultural holidays - the two areas where our competitors hold an advantage. Consider pushing culture in Helsinki more in order to not lose out to competitors on these holiday types. Linking Helsinki to spas and retreats more could help improve luxury perceptions.
- We are a leader in all outdoor, relaxation, festive and shopping holidays. The beauty, tranquillity and escapism of Finland's natural environment should be empathised to maintain this competitive advantage and further boost visitation in a country which is looking to visit less travelled rural destinations.



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