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 3rd.

**Spontaneous Destination Consideration**

Iceland ranks 31st & Denmark ranks 33rd

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 (1,200)
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**

![Flag icons for Finland, Sweden, Denmark, Norway, and Iceland]

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>63%</td>
</tr>
<tr>
<td>Sweden</td>
<td>41%</td>
</tr>
<tr>
<td>Norway</td>
<td>29%</td>
</tr>
<tr>
<td>Iceland</td>
<td>30%</td>
</tr>
<tr>
<td>Denmark</td>
<td>44%</td>
</tr>
</tbody>
</table>

*Rank '19: #2 vs. #6, #11, #5, #10
Rank change vs '15*: +3 vs. +1, = vs. =

*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

Q7 CONSIDERATION DESTINATION, Q3 EVER VISITED DESTINATION, Q6 VISITED P3Y
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**
Visitation is driven by the regions boarding Finland, where people find the country easy to access.
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.

<table>
<thead>
<tr>
<th>Barriers to visit</th>
<th>Norway</th>
<th>Iceland</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's too expensive</td>
<td>51%</td>
<td>43%</td>
<td>39%</td>
<td>32%</td>
<td>13%</td>
</tr>
<tr>
<td>It is only for people who like to be outside a lot</td>
<td>36%</td>
<td>34%</td>
<td>22%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>It's too inaccessible/hard to reach</td>
<td>49%</td>
<td>35%</td>
<td>11%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>There is nothing much to do</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,200)
What are we known for as a travel destination?
The Natural aspects of Finland come through strongly in Russia, with the strongest associations linked to its beauty, lake's and fish. The ease of visitation is also mentioned frequently.

Spontaneous Impressions - Finland

Lakes, lakes, lakes. The new library in Helsinki, ferries to Stockholm

Close, high quality, beautiful nature, comfort and accessibility

Convenient means of transport (train, you can drive from St. Petersburg), the opportunity to buy quality imported clothes, you can rent a cottage for the weekend

Many lakes and pure nature, tranquillity, the village of Santa Claus, Sveaborg and other attractions, Helsinki valley, Moomins

It is close, it is easy to get a visa, you can go for one day

Moomins, the village of Santa Claus, Northern Lights, Lapland, sleigh reindeer, Suomenlinna Fortress, and other forests

Close to St. Petersburg, it is easy to get a visa

The country is a huge number of lakes. Very clean and comfortable.

A wonderful holiday in the realm of almost untouched nature. Amazing lakes, excellent fishing

Lakes, tranquillity, beautiful nature, purity, holiday, shopping. I would like to once again to visit the castle in Turku.

Beautiful, close, comfortable, relaxing stay, forest, mushrooms, fishing, lake, sauna

Music festivals, clear lakes, high culture, fishing

Unique natural landscape, a large number of lakes

Pure nature, lakes, solitude, fishing

A clear country with distinct people, clean and well maintained. Lapland.

It is easy to get a visa

Base: Consideration Set: Finland (894)
The beauty and natural associations, also come through strongly in the rest of the Nordics. With Sweden and Denmark also being linked to their capitals.
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.
Strong knowledge of Finland in Russia drives strong image associations, most notably for lakes and accessibility.

**Image Associations (Total Sample)**

- It offers calming and relaxing wilderness escapes and experiences
- It is easy to access (by plane, car or train)
- It has beautiful natural landscapes
- It has a beautiful coastline / archipelago
- It has beautiful lake areas with lots of lakes
- The climate is pleasant for summer holidays
- It's a good place to visit all year round
- It's a great place for winter sports/ activities (e.g. skiing, snowboarding)
- You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.)

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

Base: Total Sample (1,200)
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.

**Imagery Associations – key differences by region**

- **St. Petersburg, Vyborg and Leningrad oblast**
  - It offers calming and relaxing wilderness escapes and experiences
  - You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.)
  - It has a beautiful coastline / archipelago
  - It’s a great place for winter sports/ activities (e.g. skiing, snowboarding)
  - It’s a good place to visit all year round
  - It provides high-end/luxurious holiday experiences
  - It has beautiful lake areas with lots of lakes
  - It’s a family-friendly destination
  - It’s easy to find information about the destination online
  - It is known for providing/promoting sustainable tourism
  - It is easy to access (by plane, car or train)
  - It’s a great destination for a short break or stopover
  - It is a good place to get high quality medical treatment

- **Moscow area**

- **Republic Karelia**

**Base:** St. Petersburg, Vyborg and Leningrad oblast (486), Moscow Area (559), Republic Karelia (155)
Finland has the strongest association with being sustainable in Russia, which is considerably higher among the older age groups.
In your opinion, what is meant by a ‘sustainable’ travel destination?

A sustainable travel destination is one that is in demand among different categories of tourists all year round. It offers a variety of types of holidays. A well-organized tourist destination means where tourists go constantly. A constant flow of tourists, regardless of the season, is a feature of a sustainable destination. A well-developed tourist infrastructure is another characteristic, with the tourist season lasting 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 is another feature of a sustainable destination. 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.

Visit Finland
Q23 SUSTAINABILITY
In your opinion, what is meant by a ‘sustainable’ travel destination?
Activity Associations
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.
Russians also closely associate cottage retreats and visiting lakes with Finland. Moomins are also correctly linked to Finland.
How are people visiting us?
The Russian population prefer city break, cultural and beach holidays.

**Preferred Holiday Type (Total Sample)**

- City breaks: 75%
- Cultural: 70%
- Beach: 62%
- Tours to multiple cities/locations within a country: 57%
- Tours to multiple countries in a region: 42%
- Outdoors & active holidays in the summer: 40%
- Shopping trips: 35%
- Festive holidays at Christmas: 33%
- Country holidays: 33%
- Relaxation & well-being: 28%
- Cruises: 27%
- Outdoors & active holidays in the winter: 27%
- Health & spa: 22%

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**

- City breaks
- Shopping trips
- Cruises
- Immersing yourself in local culture
- Visiting cultural attractions
- Tours to multiple cities/locations within a country
- Tours to multiple countries in a region
- Luxury travel

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

<table>
<thead>
<tr>
<th>Holiday Type Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
</tr>
</tbody>
</table>

**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.

**Trip Arranging**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Myself</td>
<td>61%</td>
</tr>
<tr>
<td>Tour operator</td>
<td>9%</td>
</tr>
<tr>
<td>Ready-made package</td>
<td>11%</td>
</tr>
<tr>
<td>Mix - myself and tour operator</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>None of these</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Book trip myself**

- **Denmark**: 42%
- **Iceland**: 41%
- **Sweden**: 40%
- **Norway**: 37%

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

- **An international holiday of 5 nights or more away**: 57%
- **A holiday within your country of 5 nights or more away**: 41%
- **A short break within your country of 1-4 nights away**: 34%
- **An international short break of 1-4 nights away**: 25%
- **None of these**: 9%

- **18-24**: 49%
- **25-34**: 56%
- **35-44**: 58%
- **45-54**: 59%
- **55-65**: 58%
- **St. Petersburg, Vyborg and Leningrad oblast**: 56%
- **Moscow area**: 64%
- **Republic Karelia**: 39%

Base: Total Sample (1,200)
Two-thirds of Russians travel with their Spouse or Partner.

**Travel Companion**

- With spouse / partner: 67%
- With young family aged 16 or under (e.g. children, grandchildren): 25%
- With adult friend(s) aged 17+: 19%
- With adult family aged 17+ (e.g. parent, sister): 17%
- No-one, I travel alone: 9%
- Other: 3%
- With a school, college or study group: 2%

Base: Total Sample (1,200)
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.