

#VFWWhatsUp

# Suomen vetovoimatekijät Segmentointimalli

Visit Finland

Esitykset löytyvät  
VisitFinland.fi:  
Seminaarien satoa ja  
Tutkimukset



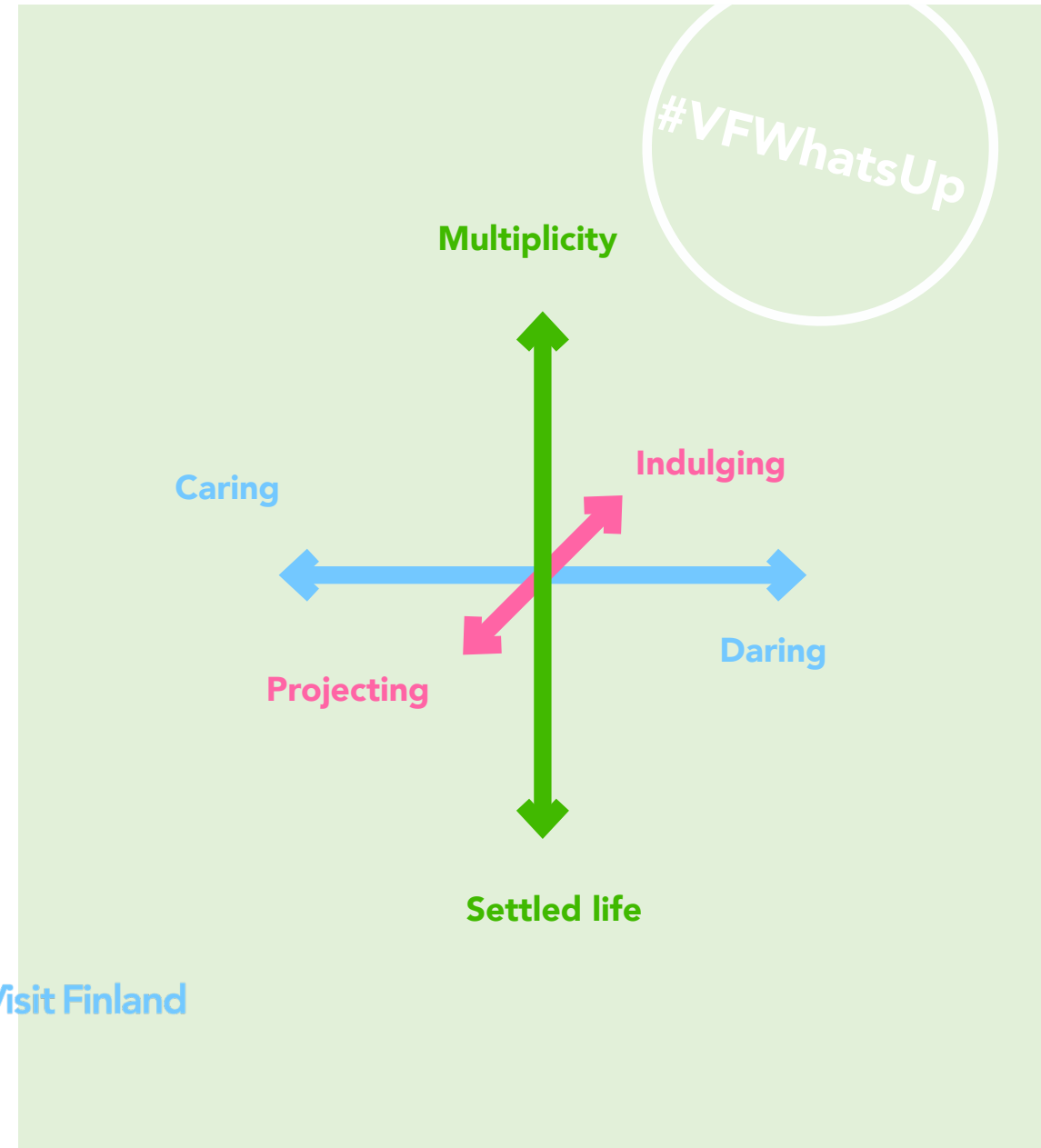
# Towards a motives based segmenting

Tactical campaigns to accompany image marketing

Marketing increasingly geared towards sales promotion



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# Finland's position & differentiation

Nature

Culture/ City

#VFWhatsUp



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# Motive based segmentation to optimize marketing activities

*16/11/2017 Research conducted by Nepa*





# A CONSUMER SCIENCE COMPANY

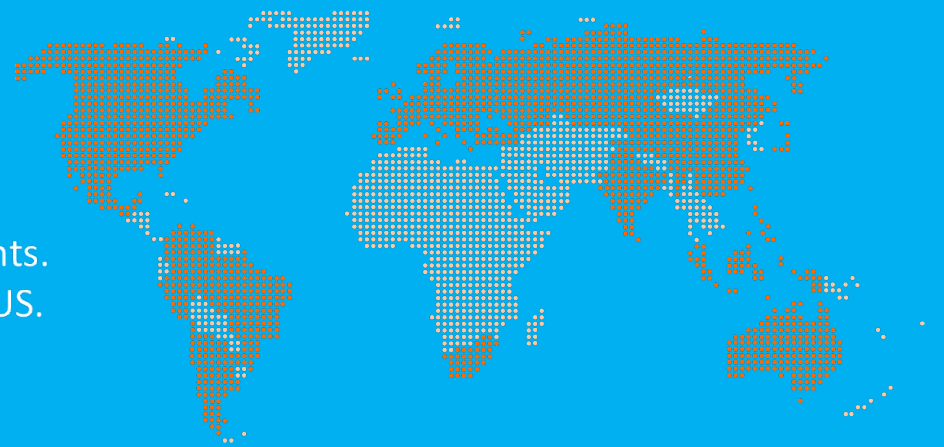
## WHY?

- Consumer research and data science methodologies
- Using of why-data in combination with what-data
- Analyzing both consumers and non-consumers
- We are a bunch of business developers and engineers
- And, we are the first consumer science company in the world



# NEPA FACTS

- Founded in 2006 and listed on Nasdaq Stockholm 2016.
- Ongoing assignments in over 50 countries across five continents.
- Local presence in FIN, DEN, NOR, SWE (HQ), UK, IND and the US.
- DI's Gasell award six years straight in Sweden
- Kauppalehti Achiever 2016/2017
- Serving some of the world's strongest global brands.





# Nepa's experience of segmentation analysis

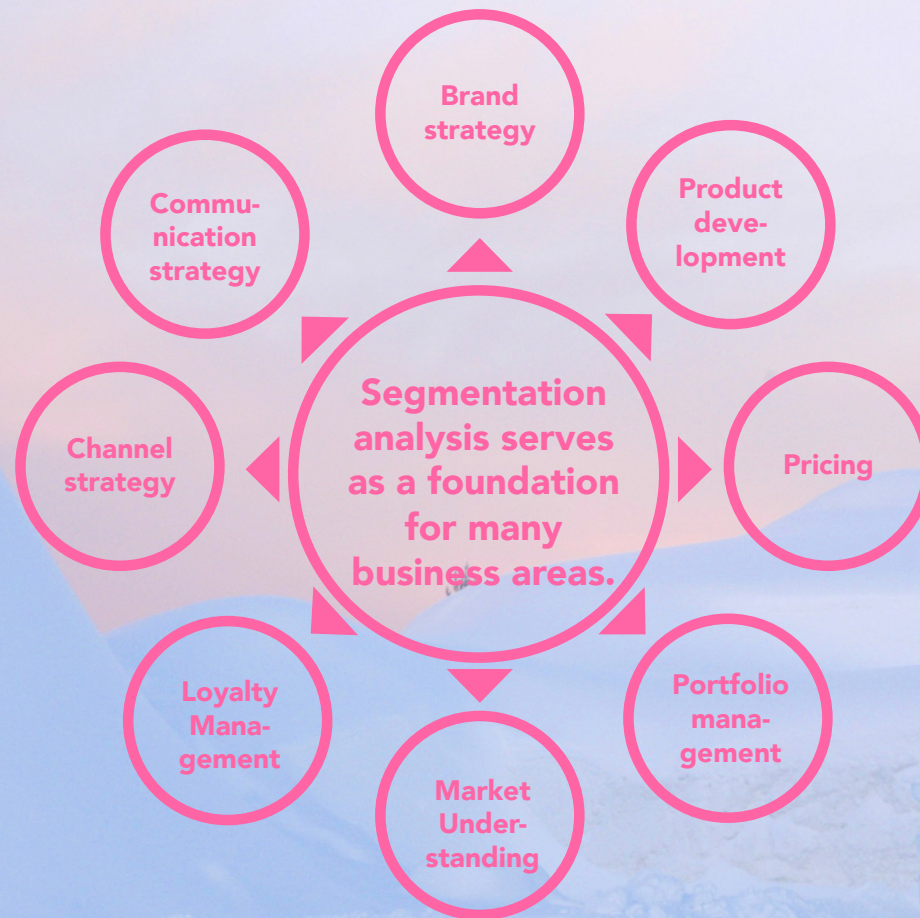
A lightbulb is placed on a dark chalkboard. On the chalkboard, there is a chalk drawing of a lightbulb, mirroring the physical one. The background is a dark, textured surface.

Nepa has conducted 50+ segmentation projects

We have experience from several industries including Direct Selling, FMCG, Retail, Telecom, Media, Finance, Travel, Education, NGO and Energy

Nepa has extensive experience from several clustering techniques. Some examples of clustering methods are K-means, Hierarchical, Trees, Cluster ensemble and Neural network

# Why segmentation analysis?





# There are several ways of segmenting market

## Examples on variables

Values / Attitudes	Needs	Situation	Behavioural	Demography	Sociography
Lifestyle Fundamental, individual drivers	Attitude to consumption of different products Category-specific needs	Needs in different situations Attitudes in different situations	Frequency Monetary value	Age, gender, life stage Geography	Income Job situation

## Situation based segmentation will answer the following...

- What should we communicate (Content)?
- To whom should we communicate (Target groups)?
- Where should we communicate (Channel choice)?
- When should we communicate (Timing for travel and decision)?



# Method of the segmentation project

Conducted in four countries:



London and  
Manchester area



Berlin, Bavaria and  
Nordhein-Westfalen area



Tokyo and  
Osaka area



Nationally  
representative



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Online interviews  
Data collection in  
July-August 2017  
1000 IP per market

With risk of being cheesy...

Focus 1

Think globally,

Focus 2

act locally



Unified reasons in focus



Local adaption of  
communication



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# Segments

## Core segments

Nature  
Wonder  
Hunters

Nature  
Explorers

Activity  
Enthusiast

## Supporting segments

Authentic  
Lifestyle  
Seekers

Comfort  
Seekers

City  
Breakers



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# Based on analysis six main segments were identified



**Nature Wonder  
Hunters**

**Luonnon  
ihmeiden  
metsästäjät**



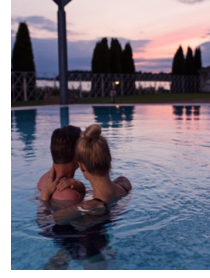
**Nature  
Explorers**

**Luonto-  
nautiskelijat**



**Activity  
Enthusiasts**

**Aktiiviset  
seikkailijat**



**"Comfort  
Seekers"**

**"Suomalainen  
luksus"**



**City  
Breakers**

**City-  
breikkaajat**



**Authentic  
Lifestyle  
Seekers**

**Aitouden  
etsijät**



*One respondent  
can belong to  
several segment*

## Nature Wonder Hunters: Luonnonihmeiden metsästäjät

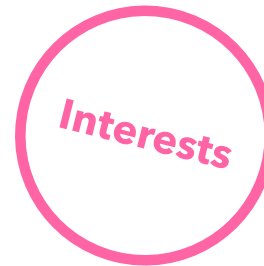


Why does the segment travel?

Unique  
nature  
Experience



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Northern lights  
Midnight sun

### Story behind the segment name

Wants to achieve special experiences during holiday.

Important to see wonders of the nature and capture as well as share them.

Schedule of the trip can be tight, wants to see everything that has been planned.

Once in a lifetime attitude separates from Nature explorer, also older than them



## Nature Explorers : Luontonautiskelijat



Why does the segment travel?

**Peaceful  
nature  
Rewinding**



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*Interests*

**Natural parks**

**Forests**

**Lakes**

**Genuine nature**

**Northern lights**

**Midnight sun**

**Retrites**

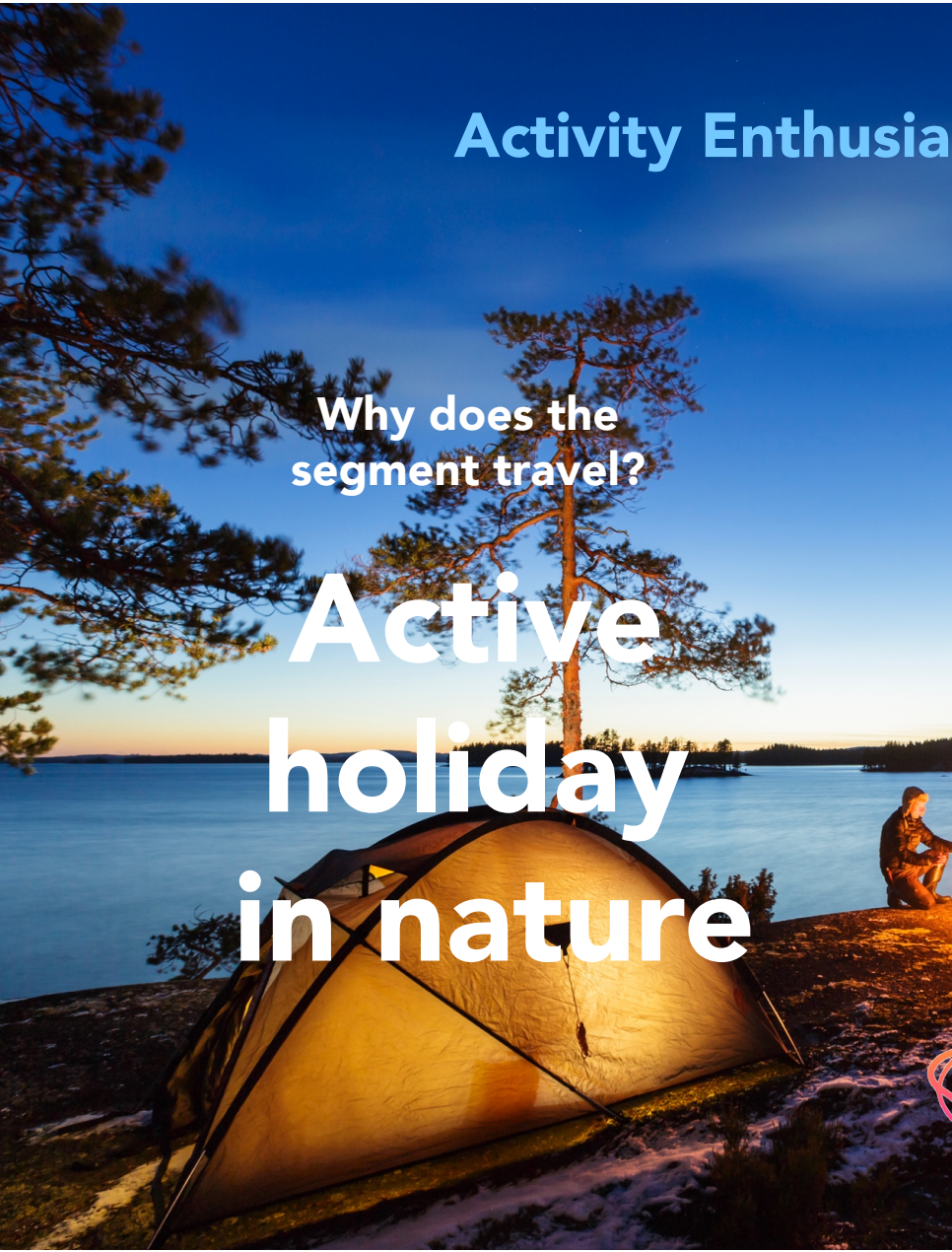
**Berries, mushrooms**

**Story behind the segment name**

Wants to rewind in nature and enjoy the peace and beautiful scenery.

Slow life, no rush.

Enjoying the purity of nature to get balance in hectic everyday life.



## Activity Enthusiasts: **Aktiiviset seikkailijat**



Why does the segment travel?

**Active holiday in nature**



**Extreme sports**  
**Sking**  
**Winter**  
**Arctic nature**  
**Animals**  
**Water/snow activities**

### **Story behind the segment name**

Wants to be active during holiday and this gives great mood and energy to these travellers.

Enthusiastic to try new and unique/special sports.

Also important to experience beautiful scenery trough activities.



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Comfort Seeker

Why does the  
segment travel?

Wellbeing  
Time for  
myself



Suomalainen luksus



Interests

Well-being  
services  
Special  
accommodation  
Spas  
Husky/reindeer  
safari  
Light sport  
activities in  
nature

Story behind the  
segment name

Wants to feel good  
emotionally and physically  
(body&soul).

Ready to invest more in  
expensive and special  
accommodation and  
activities.





## Authentic Lifestyle Seekers: Aitouden etsijät



Why does the segment travel?

Getting  
to know  
local lifestyle



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### Interests

Local museums  
and events, festivals,  
concerts  
Local life  
Nature  
Sauna  
Food culture  
Culture destinations  
Design districts  
Special accommodation

### Story behind the segment name

Wants to blend in with the locals and avoid places with lots of tourists.

Important to achieve feeling of what it would be like to live in the country.

Versatile experience of lifestyle of the country.

# City Breakers : Citybreikkaajat



Why does the segment travel?

City  
experience  
Sightseeing



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Interests

City culture  
Museums  
Design districts  
General city  
experience  
Food culture  
Local events  
Shopping

## Story behind the segment name

Wishes to see and explore the specialities of a city, areas where there's interesting experiences to see and do.

Stories and history of the city important.

Desire to experience the lifestyle of the city but clearly from a travellers perspective.



# Based on analysis six main segments were identified



**Nature Wonder  
Hunters**

**Luonnon  
ihmeiden  
metsästäjät**



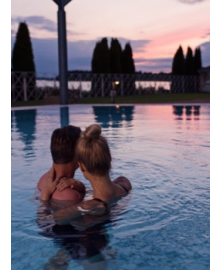
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**City  
Breakers**

**City-  
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**Authentic  
Lifestyle  
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**Aitouden  
etsijät**



*One respondent  
can belong to  
several segment*



**Which segments should we focus on?**

## **1: Size / Value:**

The segment needs to be large enough

## **2: Current image:**

Finland's strengths today needs to  
be taken into consideration

## **3: Desired image:**

The desired position of Finland



## Segment sizes



**City  
Breakers**



**Nature  
Explorers**



**Nature  
Wonder  
Hunters**



**Activity  
Enthusiasts**



**Authentic  
Lifestyle  
Seekers**



**Comfort  
Seekers**

	City Breakers	Nature Explorers	Nature Wonder Hunters	Activity Enthusiasts	Authentic Lifestyle Seekers	Comfort Seekers
<b>UK</b>	<b>22%</b>	<b>17%</b>	<b>12%</b>	<b>12%</b>	<b>23%</b>	<b>15%</b>
<b>Germany</b>	<b>23%</b>	<b>17%</b>	<b>12%</b>	<b>15%</b>	<b>23%</b>	<b>9%</b>
<b>Japan</b>	<b>22%</b>	<b>14%</b>	<b>8%</b>	<b>18%</b>	<b>20%</b>	<b>18%</b>
<b>China</b>	<b>21%</b>	<b>16%</b>	<b>10%</b>	<b>10%</b>	<b>21%</b>	<b>22%</b>
<b>Average</b>	<b>22%</b>	<b>16%</b>	<b>12%</b>	<b>14%</b>	<b>22%</b>	<b>16%</b>

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months

## Winter and cold are the main motives for travelling to Finland?

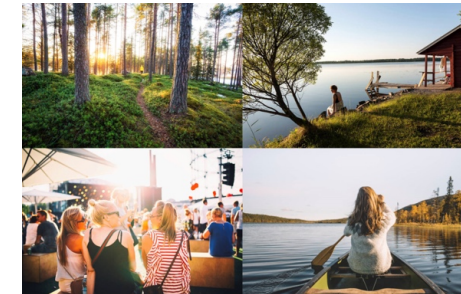


Q: What is the first thing you think about when you think about Finland?

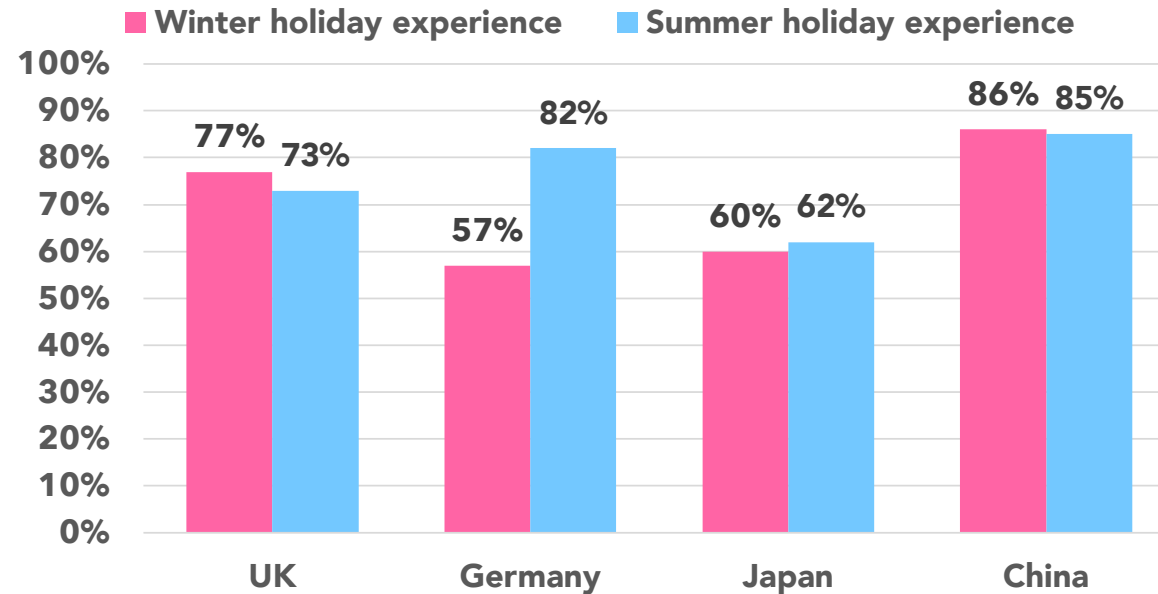


# NO! Summer is equally interesting once people get informed

## Summer holiday experience



## Winter holiday experience



Very interested (sum 5-7)

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 monthsc



Q: How interested would you be in making the following kind of trip?

# What's unique for Finland compared to other countries

Activities associated with Finland –  
Points of difference (POD) vs other countries



**Experiencing  
Northern lights**



**Experiencing  
Local nature**



**Experiencing  
Natural Forest**



**Experiencing  
Lakes**



**Experiencing  
Winter**

**POD  
Finland**





## Uniqueness gives Finland the possibility to win within several segments interested in different types of nature experiences



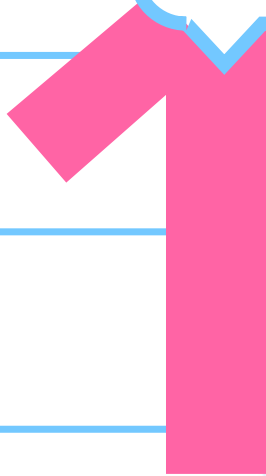
High interest in segment

POD Finland	City Breakers	Nature Explorers	Nature Wonder Hunters	Activity Enthusiasts	Authentic Lifestyle Seekers	Comfort Seekers
✓ Experiencing Northern lights						
✓ Experiencing Local nature						
✓ Experiencing Natural Forest						
✓ Experiencing Lakes						
✓ Experiencing Winter						

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months

Core segments

- Nature Wonder Hunters
- Nature Explorers
- Activity Enthusiasts



Main focus  
due to  
Finland being  
strong on  
nature



- Authentic Lifestyle Seekers
- Comfort Seekers
- City Breakers

Supporting segments



**With risk of being cheesy...**

**Focus 1**

**Think globally,**

**Focus 2**

**act locally**

▶ **Unified reasons in focus**

▶ **Local adaption of communication**



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## What data has been analysed on country level?

MARKET UNDERSTADING				SEGMENT SPECIFIC	
Segment size & value	Interests & Drivers	Potential & Perception Finland	Travel details	Scorecards	Media behaviour
<p>Size</p> <p>Budget</p> <p>Value share</p>	<p>Most important interests among segment</p> <p>Driver ranking (what is important when travelling)</p>	<p>Familiarity, consideration and preference</p> <p>Finland vs. competitors</p> <p>Likelihood of visiting Finland</p> <p>Main/stop-over destination</p> <p>Image of Finland vs. competitors</p>	<p>Booking channel</p> <p>Booking time</p> <p>Travel time</p> <p>Duration of the trip</p> <p>Travel companion</p>	<p>Gender, age</p> <p>Share, value, buget</p> <p>Media</p> <p>Travel companion</p> <p>Consideration</p> <p>Booking behavior</p> <p>Travel time</p> <p>Interests</p> <p>Drivers</p>	<p>Weekly usage</p> <p>Information</p> <p>Inspiration</p>



# UK: Nature Wonder Hunters

■ Northern lights enthusiast ■ Total



Base: Segment 188 IP, Total 1000 IP

All respondents are consumers who have made a leisure trip to Europe/Nordics last 12 month or who are planning to make a leisure trip the next 12 months

Country summary UK

:

Image of Finland



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Country summary Germany

:

Image of Finland

cold Helsinki  
beautiful northern  
snow sauna Nature fjords  
ice people lakes reindeer  
forests



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Country summary Japan

:

Image of Finland

claus  
aurora fjord cold  
white sauna nordic  
moomin santa  
helsinki



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# Country summary China

:

## Image of Finland

lights  
helsinki  
country  
island  
santa  
scenery  
snow  
lake  
aurora  
cold  
ice  
thousand  
beautiful  
finnish  
nokia  
claus  
northern



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# Next steps

- USP:t ohjaavat tuotesisältöjä ja tuotteita
  - Hyödynnetään ohjelmien / projektien tuotekehityksessä, tuotteistamisessa ja sisältöjen luomisessa





# Next steps

- Kohderyhmäopas elinkeinon käyttöön
- Visit Finland Akatemian valmennuskokonaisuus
- Aikataulu huhtikuu 2018 alku



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THANK YOU  
FOR TODAY!



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