

#VFWhatsUp

Suomen vetovoimatekijät Segmentointimalli



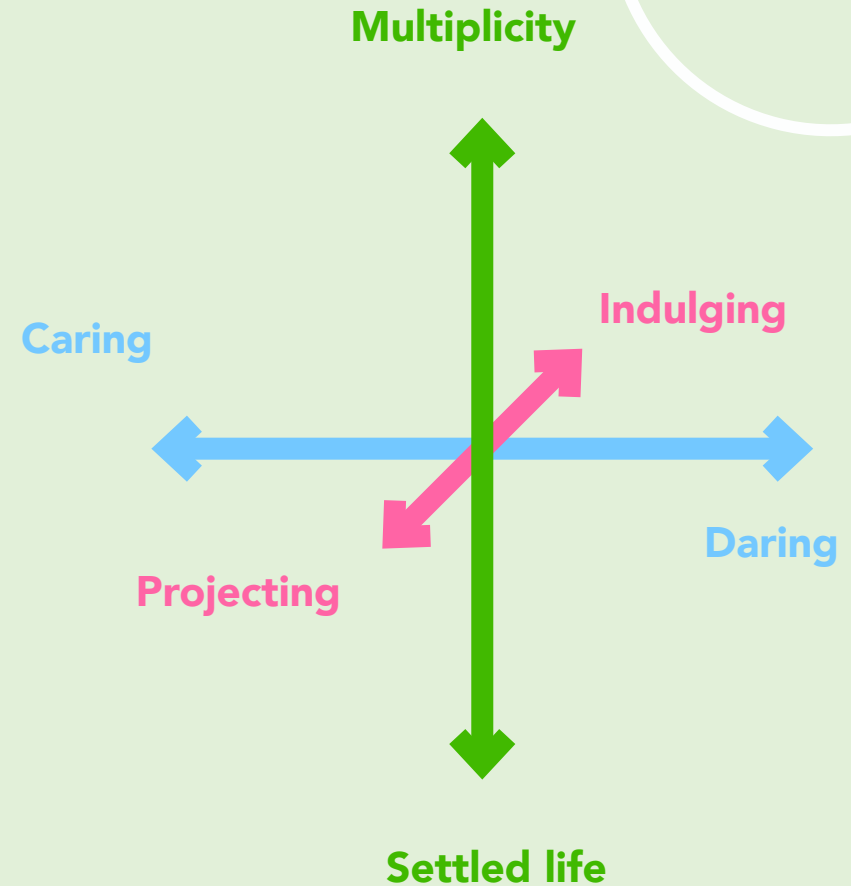
Visit Finland

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



Finland's position & differentiation

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#VFWWhatsUp

Motive based segmentation to optimize marketing activities

16/11/2017 Research conducted by Nepa



A CONSUMER SCIENCE COMPANY

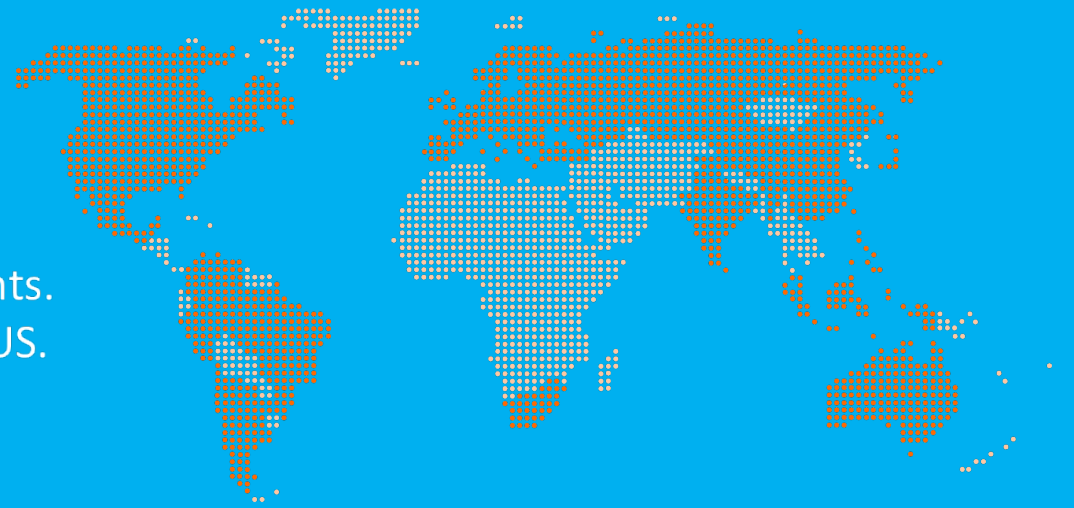
WHY?

- 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

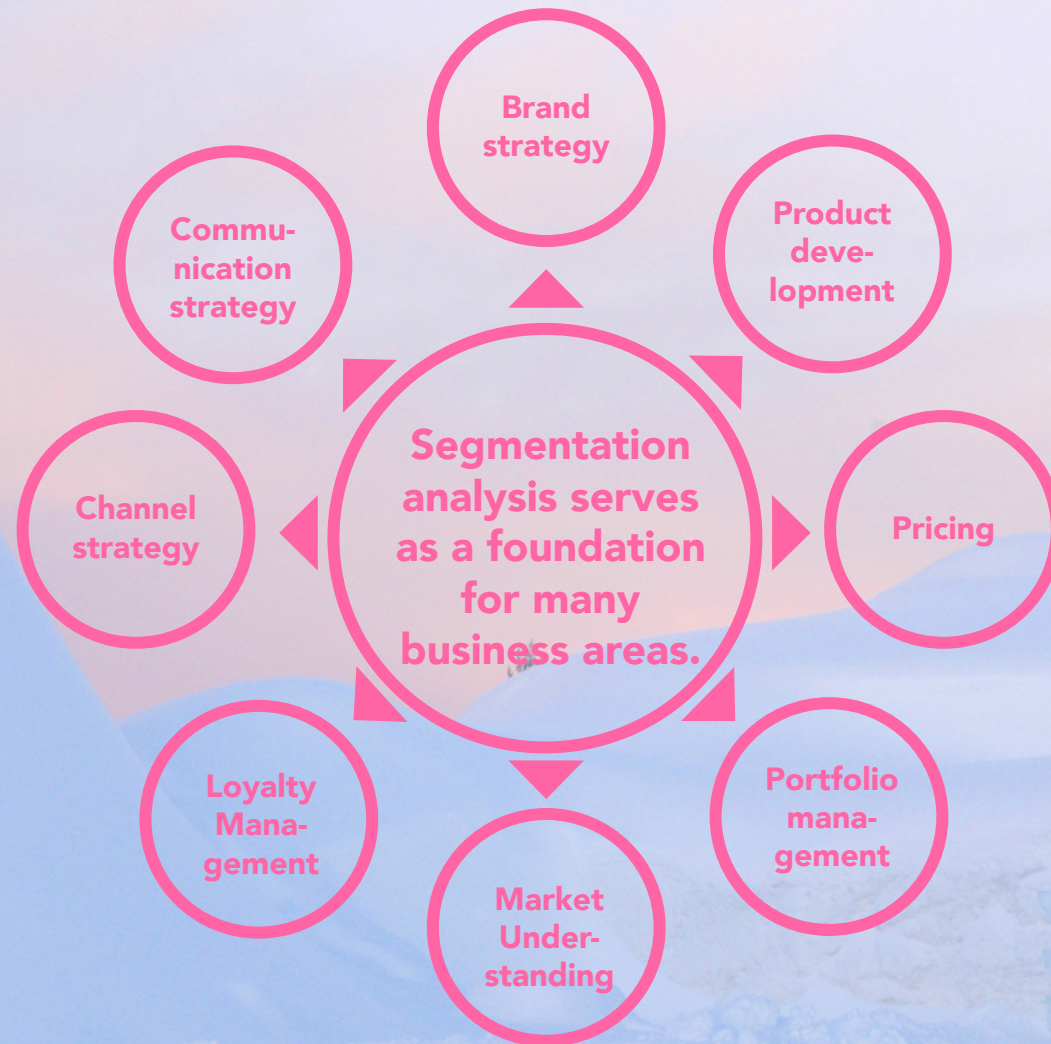
A lightbulb is placed on a chalkboard. The chalkboard has a thought bubble diagram drawn on it, with several smaller circles below it, suggesting a process or flow. The background is dark and textured.

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

Lifestyle
Fundamental,
individual
drivers

Needs

Attitude to
consumption of
different products
Category-specific
needs

Situation

Needs in
different
situations
Attitudes in
different
situations

Behavioural

Frequency
Monetary
value

Demography

Age, gender,
life stage
Geography

Sociography

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 Nordrhein-Westfalen area



Tokyo and Osaka area



Nationally representative



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

With risk of being cheesy...

Focus 1

Think globally,



Unified reasons in focus

Focus 2

act locally



Local adaptation of
communication



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Segments

Core segments

Supporting segments

Nature
Wonder
Hunters

Nature
Explorers

Activity
Enthusiast

Authentic
Lifestyle
Seekers

Comfort
Seekers

City
Breakers



Based on analysis six main segments were identified



**Nature Wonder
Hunters**

**Luonnon
ihmeiden
metsästäjät**



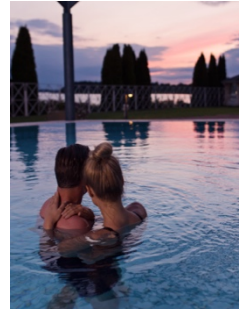
**Nature
Explorers**

**Luonto-
nautiskelijat**



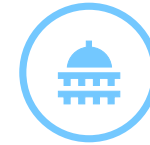
**Activity
Enthusiasts**

**Aktiiviset
seikkailijat**



**"Comfort
Seekers"**

**"Suomalainen
luksus"**



**City
Breakers**

**City-
breikkaajat**



**Authentic
Lifestyle
Seekers**

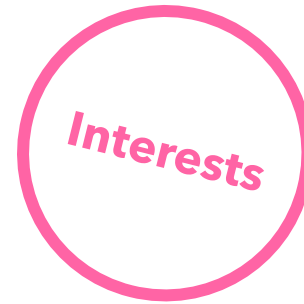
**Aitouden
etsijät**

Nature Wonder Hunters: Luonnonihmeiden metsästäjät



Why does the segment travel?

Unique
nature
Experience



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.

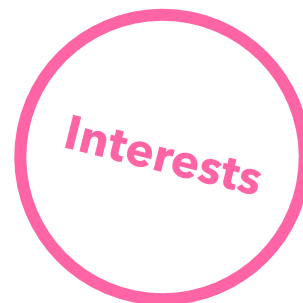
Enjoying the purity of nature to get balance in hectic everyday life.

Activity Enthusiasts: Aktiiviset seikkailijat



Why does the segment travel?

**Active
holiday
in nature**



Extreme sports

Skating

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 through activities.



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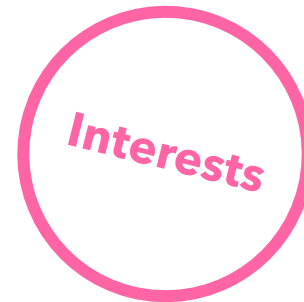
Comfort Seeker

Why does the segment travel?

Wellbeing
Time for
myself



Suomalainen luksus



Story behind the segment name

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

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.

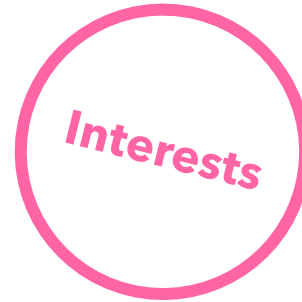
Versatile experience of lifestyle of the country.

City Breakers : Citybreikkaajat



Why does the segment travel?

City
experience
Sightseeing



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**



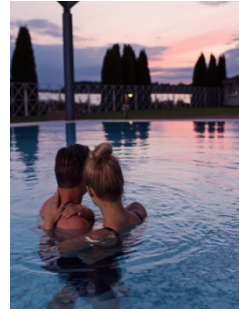
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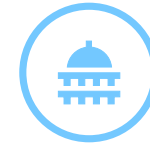
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**City
Breakers**

**City-
breikkaajat**



**Authentic
Lifestyle
Seekers**

**Aitouden
etsijät**

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 |
|----------------|---------------|------------------|-----------------------|----------------------|-----------------------------|-----------------|
| UK | 22% | 17% | 12% | 12% | 23% | 15% |
| Germany | 23% | 17% | 12% | 15% | 23% | 9% |
| Japan | 22% | 14% | 8% | 18% | 20% | 18% |
| China | 21% | 16% | 10% | 10% | 21% | 22% |
| Average | 22% | 16% | 12% | 14% | 22% | 16% |

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?

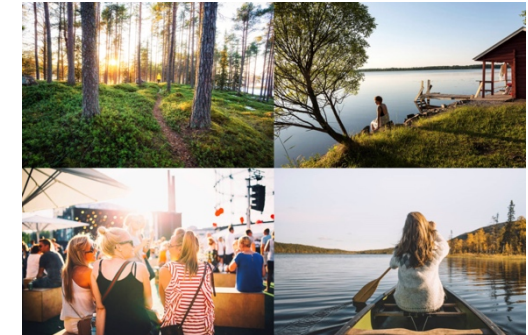


Q: What is the first thing you think about when you think about Finland?

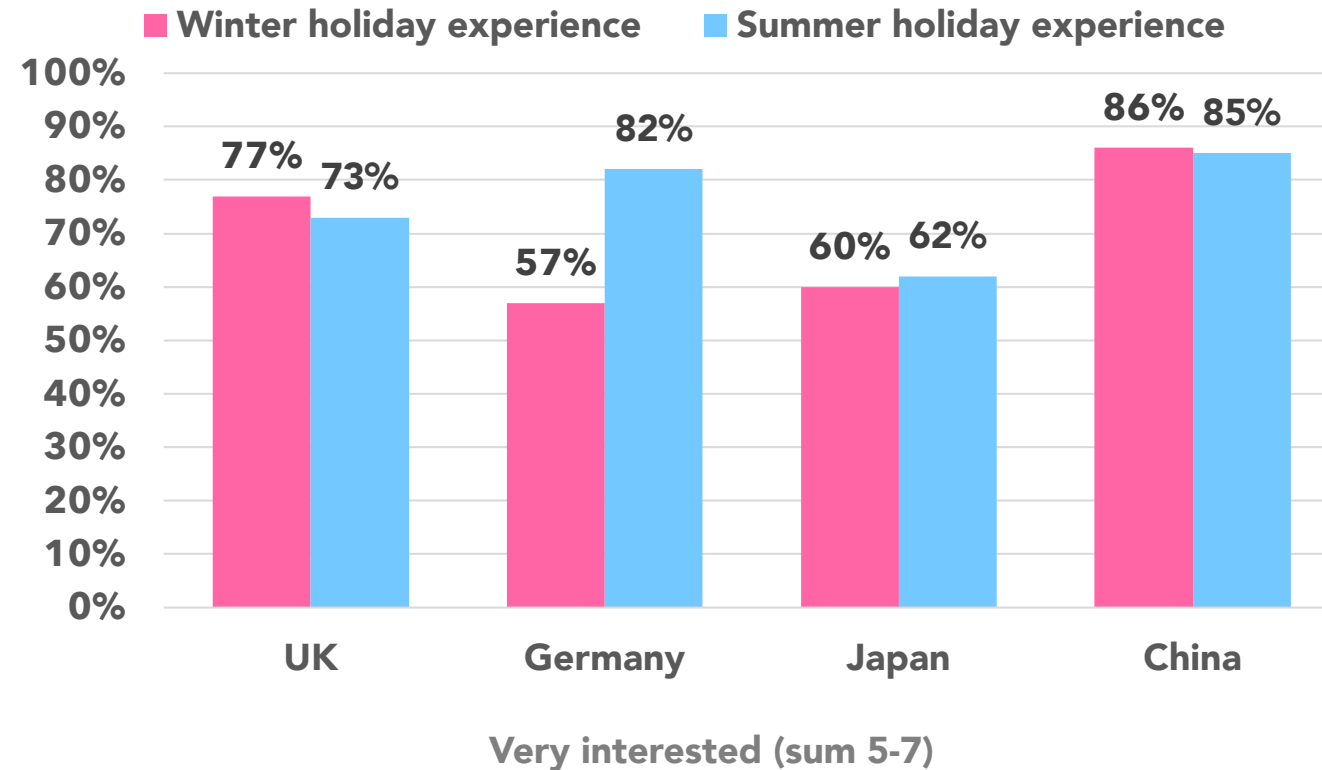


NO! Summer is equally interesting once people get informed

Summer holiday experience



Winter holiday experience



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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**

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 | | | | | | |

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Core segments

Main focus
due to
Finland being
strong on
nature

Nature
Wonder
Hunters

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Comfort
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City
Breakers

Supporting segments



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With risk of being cheesy...

Focus 1

Think globally,

▶ Unified reasons in focus

Focus 2

act locally

▶ Local adaption of communication



Visit Finland

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

:

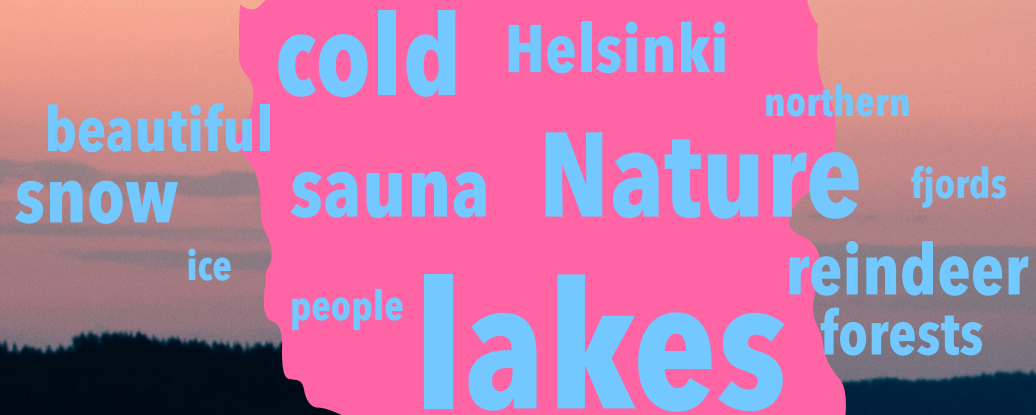
Image of Finland



Country summary Germany

:

Image of Finland



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



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Country summary Japan

:

Image of Finland



Visit Finland

Country summary China : Image of Finland



lights helsinki
island **country**
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**

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Next steps

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

Esitykset löytyvät
Visitfinland.fi:
Seminaarien satoa ja
Tutkimukset



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THANK YOU
FOR TODAY!



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