

REPORTS 166

JAPANESE TOURISTS IN FINLAND, ESTONIA AND LATVIA – A LITERATURE REVIEW

HANNELE SUVANTO, LEA SUDAKOVA, KAILI KATTAI, GUNTA GRĪNBERGA-ZĀLĪTE
AND ZANE BULDERBERGA



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PREFACE

Asian tourism has been seen as a new potential growth market for Finland and the Baltic States for some time, and several national and regional tourism strategies count on this market. In previous years, Asian visitors have generally focused on the main tourist attractions and capital cities, but new products have attracted more interest in this market, in line with the worldwide trends in health, wellness and the natural environment. This creates new opportunities, especially for rural tourism, but not without its challenges. Rural tourism provision must meet Asian customers' needs and demands, which may be sometimes problematic for the existing products. Therefore, to fully exploit this potential new market, companies often need to undertake development activities. This, in turn, assumes that businesses have knowledge of the behaviour of Asian tourists.

This report seeks to provide a small part of this information by collecting the existing literature and surveys made on Japanese tourists and their travel behaviour in Finland, Estonia and Latvia. The aim is to provide the existing knowledge in a summarised form to help developers and SMEs and to support product development. University of Helsinki, Ruralia Institute has had bears the main responsibility for writing and editing this report, but the national literature and information from Estonia and Latvia has been collected and edited by the Estonian University of Life Sciences and Faculty of Economics and Social Development at the Latvia University of Agriculture.

The report has been compiled as a part of the CAITO project (The meta cluster for attracting the Japanese tourism market). The project aims to promote and support rural tourism companies to enter the Japanese tourism market by strengthening their capacity and through cooperation in three states around the Baltic Sea (Latvia, Estonia, and Finland). The project was funded by the Interreg Central Baltic programme and involves 7 partners from Finland, Estonia and Latvia, the lead partner being the Estonian University of Life Sciences.

Seinäjoki, 15 of March 2017

The Authors

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ABSTRACT

Based on the results of this literature survey, it can be concluded that the following points are especially interesting from the perspective of rural tourism in Finland, Estonia and Latvia.

CHARACTERISTICS OF JAPANESE TOURISTS

Most spend a lot of money but have a short time to spend it. Men have especially short holidays, staying around three nights. The location of Finland is crucial (airport in Helsinki and stopovers) and proximity to Estonia and Latvia convenient. Travel is mainly in the summer or early autumn. In Finland, Lapland is the popular destination in winter (sport and nature) and for all adult age groups. It may be possible to shift the season into autumn (aurora borealis). In summer the most popular destinations are Helsinki (culture), and the old towns of Tallinn and Riga. Quality, originality and good service are appreciated. Japanese tourists make preparations for the trip and enjoy detailed information. Japanese web pages and marketing material are appreciated. They find nature and rural areas exotic, since over 90% of Japanese come from big cities. Women usually choose the travel destination. Middle-aged or elderly tourists find travel guides and social contacts to be important sources of information. Elderly Japanese travellers might be frugal, but recent terrorist attacks have made destination security more important to them. For young tourists, the Internet, blogs and social media are becoming more important sources of information, but they are also places to share their travel experiences. Young Japanese visitors are willing to try new destinations and their English is good but they have less money to spend.

DESTINATION AND MOTIVATIONS

The majority of Japanese are coming for the first time: Finland, Estonia and Latvia are either novel destinations or visitors do not expect to repeat the experience. Typically, tourists are highly educated and have travelled to many countries. They are typically on holiday but the holiday is short (only a few nights) or day trips (cruises). Finland, Estonia and Latvia are rarely the main destinations. Instead, the interest is in travelling to several Nordic and/

or Baltic countries on the same trip. Japanese visitors place countries within a larger framework: they are in Europe, Northern Europe and Scandinavia. Thus the motivations to travel to these countries are also similar, including design, safety, novelty, and culture. Although the aurora borealis and other nature attractions are also popular, sport activities are seen as less interesting. Therefore nature activities should be 'soft activities' or have a cultural aspect.

KEY TARGET GROUPS

Young women and especially independent women in their 20s and 30s, travelling alone or with friends. They have money to spend and they are used to spending it, making enthusiastic tourists and shoppers. They can stay for a long time (even six to seven nights) and without a schedule. They are interested in architecture, culture, food, unspoilt nature, the aurora borealis and shopping. *Elderly people* have the leisure and wealth to travel frequently and at length (tours). Language is still a problem, but is becoming less of an issue. Older tourists can be retired couples or widows. They appreciate safety, routines, guides and group travel. *Multiple generations and families*: a) mother-daughter couples, b) grandparents with their grandchildren (parents are busy with their jobs), c) three generations (a growing group) and d) young families (parents under the age of 35) or couples without children (who are especially interested in the Nordic countries).

RURAL TOURISM

Rural tourism is an increasing trend across Europe. Rural tourists value nature, landscape and the aurora borealis and they might also be modern humanists (experienced tourists) seeking experiences in exotic and unspoilt nature (forests, sauna, snow, walking on the ice) with local people. Instead of materialism, the Japanese are turning their interest to experiences, including in rural areas and nature. Wellness, relaxing, silence and peace are important to Japanese people but they are also difficult to productise. Origin and naturalness or health and sustainability are a recent trend: this includes local (organic) food, local people and culture. Rural destinations could exploit this trend. Security is another recent trend that is very well suited to rural tour-

ism. Finland, Estonia and Latvia have the image of a safe destination. Finland is characterised by design, culture, unspoilt nature and the aurora borealis. Estonia is characterised by culture (e.g. Tallinn's Old Town) and nature. Latvia is characterised by culture (e.g. Riga). The average time spent in Finland, Estonia or Latvia is short and if tourists are travelling to rural areas, this takes time. Therefore it is expected that rural tourists are mostly women or elderly people who have more time. Distances are another challenge for rural areas. In Finland, the distances are long and in Estonia, Latvia and Finland public transportation in rural areas is poor: group travellers need buses, and independent travellers may have to rent a car (typical especially in Estonia). The lack of Japanese web pages, Facebook pages and marketing material is a problem. This reduces visibility and awareness of rural tourism enterprises and travel packages. The lack of marketing actions further affects visibility and awareness levels. Rural

destinations are not the main target areas in the programmes of Visit Finland, for example. Lakeland, archipelago and coastal areas are attracting less than 10% of Japanese tourists and they have a weak profile. Good contacts (travel agents etc.) and specific marketing actions (bloggers, travel guides, core target groups) can improve this situation. The lack of skills among entrepreneurs and workers is also a problem. In rural areas, tourist enterprises are small and seasonal and therefore have difficulties in providing services for group travellers. Additionally, many rural tourism enterprises are run by part-time or lifestyle entrepreneurs who have less interest in increasing their business or serving special tourist groups such as the Japanese. Part-time and seasonal jobs do not tempt a committed and skilled work force. Japanese tourists are also interested in travelling in autumn (September and October). This may extend the season, which is very important for rural enterprises.

TIIVISTELMÄ

JAPANILAISET TURISTIT SUOMESSA, VIROSSA JA LATVIASSA – KIRJALLISUUSKATSAUS

Kirjallisuuskatsauksen perusteella alla olevat näkemykset ovat erityisen mielenkiintoisia maaseutumatkailun näkökulmasta Suomessa, Virossa ja Latviassa.

JAPANILAISET MATKAILIJAT

Tyypillisesti japanilaiset käyttävät matkailussa runsaasti rahaa, mutta heidän lomansa ovat lyhyitä. Erityisesti miehillä on lyhyet lomat. Matka kestää keskimäärin vain kolme yötä. Suomen sijainnissa ratkaisevat tekijät ovat lentokenttä (Helsinki-Vantaan lentokenttä on myös tyypillinen välilaskukenttä) ja läheisyys Viroon ja Latviaan. Japanilaisten matkailu ajoittuu lähinnä kesään tai alkusyksyyn. Matkailusezonkia yritetään siirtää syksymmäksi, jolloin revontulet jo näkyvät. Talvella Suomen Lappi on suosittu kohde (talviurheiluja luonto) kaikkien aikuisten ikäryhmien keskuudessa. Kesällä suosituimmat ovat Helsinki (kulttuuri) ja vanhat kaupungit Tallinnassa ja Riiasa. Japanilaiset valmistautuvat matkalle hyvin etukäteen ja he nauttivat matkakohteiden yksityiskohtaisista tiedoista. Japaninkielisiä verkkosivuja ja markkinointimateriaalia arvostetaan. Laatu, omaperäisyys ja hyvä palvelu ovat myös arvostettuja. Tyypillisesti japanilaisille luonto ja maaseutu ovat eksoottisia, sillä yli 90 % japanilaisista matkailijoista tulee suurkaupungeissa. Naiset valitsevat yleensä matkakohteen. Keski-ikäiset tai iäkkäät matkailijat pitävät parhaimpina tietolähteinä matkaoppaita ja sosiaalisia kontakteja. Iäkkäämmät japanilaiset nähdään säästäväisinä, mutta viime aikaiset terrori-ihyökkäykset ovat nostaneet matkakohteen turvallisuuden hintaa tärkeämmäksi. Nuorille matkailijoille Internet, blogit ja sosiaalinen media ovat yhä tärkeämpiä tietolähteitä, mutta ne ovat myös paikkoja jakaa matkakokemuksia ja kuvia. Nuoret japanilaiset ovat valmiita kokeilemaan uusia kohteita. Heidän englanninkielen taitonsa ovat vanhempia japanilaisia parempi, mutta heillä on vähemmän rahaa käytettävissään.

MATKAILUKOhteet JA -MOTIIVIT

Suurin osa japanilaisista tulee ensi kertaa Suomeen, Viroon tai Latviaan: maat ovat uusia, ja ainutkertaisia kohteita, eikä matkailijat välttämättä aio toistaa käyntiään. Tyypillisesti matkailijat ovat korkeasti koulutettuja ja he ovat aiemmin matkustelleet useissa maissa. Matka on usein lyhyt lomamatka (vain muutaman yön) tai päiväretki (risteilyjä). Suomi, Viro ja Latvia ovat harvoin pääkohdemaita, vaan japanilaisia kiinnostaa matkustaa useissa Pohjoismaissa ja Baltian maissa saman matkan aikana. Japanilaiset eivät ajattele yksittäisiä maita, vaan isompia kokonaisuuksia, kuten Eurooppa, Pohjoismaat ja Skandinaavia. Siten matkustusmotiivit ovat myös samanlaisia, kuten esimerkiksi design, turvallisuus, uutuuskohde ja kulttuuri. Revontulet ja muut luonnon nähtävyydet ovat myös suosittuja, mutta urheiluaktiviteetit nähdään vähemmän kiinnostavina. Siksi luonto- ja urheiluaktiviteettien pitäisi olla ”pehmeitä”, kevyitä tai niillä pitää olla kulttuurillinen ulottuvuus.

TÄRKEIMMÄT KOHDERYHMÄT

Tärkeä kohderyhmä on nuoret naiset ja erityisesti itsenäiset naiset, noin 20–30-vuotiaat, jotka matkustavat yksin tai ystävien kanssa. Heillä on rahaa, he ovat tottuneet kuluttamaan ja he ovat innostuneita shoppailijoita. Nuoret naiset voivat jäädä tavanomaisia japanilaisia matkailijoita pidemmäksi aikaa (jopa kuudesta seitsemään yötä) ja matkustaa ilman suunniteltuja aikatauluja. He ovat kiinnostuneita arkkitehtuurista, kulttuurista, ruoasta, koskemattomasta luonnosta ja revontulista. Iäkkäillä japanilaisilla on aikaa ja varallisuutta matkustaa usein ja pidempään. Kielitaito on edelleen ongelma, mutta sen merkitys on vähentymässä. Iäkkäät matkailijat ovat tyypillisesti eläkkeellä olevia pariskuntia tai leskiä, jotka arvostavat turvallisuutta, rutiineja, paikallisia oppaita ja ryhmämatkoja. Useiden sukupolvien ja perheiden matkoilla matkustajat ovat tyypillisesti: a) äiti-tytär pareja, b) isovan-

hempia lastenlastensa kanssa (vanhemmat ovat kiireisiä työssään), c) kolmen sukupolven pienryhmiä (kasvava ryhmä) ja d) nuoria perheitä (vanhemmat alle 35) tai lapsettomia pariskuntia (jotka ovat erityisen kiinnostuneita Pohjoismaissa).

MAASEUTUMATKAILU

Maaseutumatkailu on kasvussa kaikkialla Euroopassa. Maaseutumatkailijat arvostavat Suomessa, Virossa ja Latviassa luontoa, maisemaa ja revontulia. He saattavat myös olla niin sanottuja moderneja humanisteja (kokeneita turisteja) etsien eksoottisia kokemuksia, luontoa (metsät, sauna, lumi, kävely jäällä) ja yhteyttä paikallisiin ihmisiin. Japanilaiset ovat materialismin sijaan yhtä kiinnostuneempia kokemuksista ja maaseutualueilla myös luonnosta. Hyvinvointi, rentoutuminen, hiljaisuus ja rauha ovat tärkeitä elementtejä japanilaisille, mutta niitä on vaikea tuotteistaa matkailussa. Alkuperäisyys ja luonnollisuus sekä terveys ja kestävyys ovat nousseet trendeiksi viime aikoina: ne sisältävät mm. lähiruuan (luomu), paikalliset ihmiset ja kulttuurin. Maaseutumatkailuyritykset voisivat hyödyntää tätä suuntausta paremmin. Turvallisuus on toinen tämän hetkistä trendeistä, joka sopii erittäin hyvin maaseutumatkailuun, sillä Suomea, Viroa ja Latviaa pidetään turvaisina matkakohteina. Suomelle on matkailussa ominaista muotoilu, kulttuuri, puhdas luonto ja revontulet. Virolle puolestaan on ominaista kulttuuri (esimerkiksi Tallinnan vanhakaupunki) ja luonto ja Latvialle on ominaista kulttuuri (esimerkiksi Riika). Keskimääräinen viipymisaika Suomessa, Virossa ja Latviassa on lyhyt ja jos turistit matkustavat maaseudulla, tämä vie enemmän aikaa. Siksi on odotettavissa, että maaseudun japanilaiset matkailijat ovat useimmiten naisia tai iäkkäämpiä turisteja,

joilla on enemmän aikaa. Etäisyydet ovat toinen haaste maaseudulla. Suomessa etäisyydet ovat pitkiä ja Virossa, Latviassa ja Suomessa maaseudun joukkoliikenne on huono: ryhmämatkustajat tarvitsevat linja-auton ja itsenäinen matkailija joutuu vuokraamaan auton (tyypillistä etenkin Virossa). Japaninkielisten verkkosivujen ja Facebook-sivujen sekä markkinointimateriaalisen puute ovat maaseutumatkailuyrityksien yleinen ongelma. Tämä vähentää näkyvyyttä ja tietoisuutta maaseudun matkailuyrityksistä ja matkapaketeista. Puute markkinoinnissa vaikuttaa edelleen laajempaan näkyvyyteen ja tiedon tasoon. Maaseudun kohteet eivät ole esimerkiksi pääkohteita alueellisissa Visit Finlandin ohjelmissa. Järvi-Suomi, saaristo ja rannikko houkuttelevat vähemmän kuin 10 %:a japanilaisista turisteista ja niillä on heikko tunnettuusprofiili. Hyvät kontaktit (matkatoimistot jne.) ja erityiset markkinointitoimenpiteet (bloggaajat, matkaoppaat, kohdistus ydinkohderyhmään) voivat parantaa tilannetta. Puute yrittäjien ja työntekijöiden taidoissa on myös haasteena. Maaseudulla matkailuyritykset ovat pieniä ja riippuvaisia matkailusesongeista. Tämän vuoksi esimerkiksi ryhmien, varsinkin isojen, palvelu voi olla vaikeaa. Lisäksi monet maaseutumatkailuyritykset ovat auki vain osa-aikaisesti tai niitä hoidetaan osana muuta toimintaa tai elämäntapaa ja siksi yrittäjät eivät välttämättä ole kiinnostuneita kasvamaan, kehittymään ja palvelemaan erityisiä ryhmiä, kuten japanilaisia matkailijoita. Osa-aikaisuus ja sesonkiluonteisuus eivät houkuttele yrityksiin sitoutunutta ja ammattitaitoista työvoimaa. Sesonkiluonteisuutta helpottaa se, että japanilaiset turistit ovat kiinnostuneita matkustamisesta myös syksyllä (syyskuu ja lokakuu). Tämä voi pidentää sesonkia, mikä on erittäin tärkeää maaseudun yrityksille.

INTRODUCTION

The objective of this desk study was to compile all the relevant existing information and recent previous studies relating to the rural tourism of Japanese visitors to Finland, Estonia and Latvia. This knowledge can be used to support rural tourism marketing to Japanese tourists. In addition, we identified issues to improve understanding about the different customer segments within the Japanese tourism market and potential impacts of marketing actions aimed at increasing the number of Japanese tourists in Finland, Estonia and Latvia. This review focuses on the general characteristics of Japanese tourists and describes the special challenges and advantages of rural tourism in the investigated countries. The desk study is based on online sources, including Google Scholar and public information resources such as government databases, statistics, studies and research, presentations, theses, reports and some culture-specific books (listed in the references). We used the most recent available infor-

mation, to provide an up-to-date insight into the ongoing changes in Japanese rural tourism in these countries around the Baltic Sea.

University of Helsinki, Ruralia Institute has had bears the main responsibility for writing and editing this report, but the national literature and information from Estonia and Latvia (especially sections concerning Japanese tourist market segments in these two countries) has been collected and edited by the Estonian University of Life Sciences and Faculty of Economics and Social Development at the Latvia University of Agriculture.

We start by describing the statistics on Japanese tourism in the study countries, including the typical travelling groups. Then the images of the study countries among Japanese people, actions and themes and the ongoing trends and megatrends are assessed. Finally, Japanese tourists in rural destinations are presented, and conclusions are drawn.

Photo Vesa Rouhiainen



JAPANESE TOURISTS IN FINLAND

Finland has done well in the competition between the Nordic countries. At the moment, Finland is the market leader of all Nordic countries in Japan and visitors to Finland have stayed overnight for seven years (Partanen, 2015). Among the Nordic countries, Finland has strengthened its share of Japanese tourism, reaching 44% of the market share in 2015. In the statistics on the Nordic countries, Finland stands out especially as a winter destination for Japanese tourists. The number of Japanese overnights has increased significantly in Finland in recent years whereas the other Nordic countries have had steady markets. However, the growth of destinations in Finland is now lower than that



Photo Aana Vainio

JAPANESE IN FINLAND IN 2015

- 454 000 visitors, 5% of all visitors
- 193 000 stopover visitors at the airport
- 168 000 overnight and 93 000 same-day visitors
- 140 000 visits with Finland as the main destination
- 71% came to Finland for the first time
- 4% of all visitors but 7% of visitors under 35 years old
- 8% of money spent by all visitors
- 0.8% of all Japanese travellers abroad came to Finland (22% came to Europe)
- 55% are under 35 years old
- 10% are over 64 years old
- 40% came with family, 25% with friends, 24% alone and 10% on holiday with a group
- 50% from Tokyo area and 21% from Osaka area
- 70% come to Finland on holiday in summer (August and September)
- 69% Helsinki, 22% Lapland, 5% archipelago and coastal area and 4% Lakeland overnights by destination
- 60% of overnights are in the summer (increasing trend)
- 70% booked their holiday on the Internet
- 1.4 nights is the average duration of the trip
- 75% of holidaymakers stay in a hotel or motel
- 68% are interested in culture, 32% sauna and 27% archipelago
- 67% also visit other countries, typically Estonia

Figure 1. Japanese tourism in Finland. Collection of statistics (Visit Finland, 2016c, 2016d, 2016e, 2016f)



Photo Ruralia Institute

of other Nordic countries, because the growth is now in traditional package tours, to the benefit of Sweden and Norway. At the same time, individual travelling, which is a strength of Finland, seemed to remain at the same level as last year, while Japanese overnights in the winter season have decreased for several years (Finland & Sweden, 2016; Visit Finland, 2016a; Visit Finland Statistics, 2016).

Japan is the seventh most important market for Finland in terms of the number of all foreign overnights (4% of all foreign overnights). They made 454 000 trips to Finland in 2015 (Figure 1) and their visits have increased over a third compared with 2014. The Japanese have especially increased their day trips due to the Baltic Sea cruises. Finland is, however, rarely the first choice for Japanese tourists: in 2015, only 31% had Finland as their main destination, for 26% Finland was one of multiple destinations and 43% were transit travellers (Visit Finland, 2016d, 2016e, 2016f).

Finland is most often the main destination for tourists arriving from Europe and Latin America. In contrast, for tourists arriving from North America, Asia and Australia, Finland is often a transit country. Asian transit travellers continue to Italy, Spain, Germany, France and Great Britain. The largest number of transit passengers arrives from China,

Russia and Japan. Furthermore, Finland is often used as a gateway to the neighbouring countries of Estonia, Sweden and Russia. In 2015, around 90% of all Japanese visitors to Finland also visited other countries. If Finland is the main target, 70% travel also to Estonia but if Finland is not the main target, over 40% travel to Estonia and 25% to the other Baltic States on Baltic tours (Visit Finland, 2016c, 2016d, 2016f). According to Tropp (2015), Estonia is not widely known as travel destination, but tourists who are highly educated and have already visited many places travel to Estonia.

There are direct flight connections from Finland to three major Japanese cities, Tokyo, Osaka and Nagoya, and these are also the main areas from which the tourists come (over 90%). Not all of these are holidaymakers: half of the tourists from the Tokyo area come for a leisure trip, but from other areas the number is only 16%. Helsinki-Vantaa airport is often used to transfer to other destinations in Europe on arrival (Visit Finland, 2016c, 2016d, 2016f). Nevertheless, according to Nepa (2016), in 2015 only 28% were interested in a stopover in Finland, although over half of them travel to Europe at least once a year.

Around 63% of the visits made to Finland as the main destination were leisure trips, 8.6% were

shopping trips and only 7.1% were business trips in 2015. Japanese holidays are short: the average time spent in Finland is 3.8 nights (stopovers and day visitors are not included) while the Chinese stay 7.8 nights. Leisure tourists stayed in Finland for an average of three nights while visitors staying with friends or relatives spent 8.1 nights and business visitors 4.4 nights. In the popular Helsinki area, the average stay was only 1.84 nights in 2015. Over half use a hotel or motel, and only 10% rent a cottage or stay in a campsite or hostel (Visit Finland, 2016d, 2016f). Around 25% of visits were package holidays. Tourists coming from Asia are less likely than others to use the Internet for booking accommodation or travel (Japanese 59%), while, for example, Canadians used the Internet in 77% of cases. However, the share of Internet reservations is increasing and mobile booking is already popular in Japan (Korhonen & Tuovinen, 2015b; Tilastokeskus, 2016; Visit Finland, 2016c).

The largest group of Japanese tourists in Finland is 35-44 year-olds (28%), then 25-34 year-olds (26%) and finally 45-54 year-olds (15%). When Finland is the main destination, 55% of Japanese tourists are under the age of 35. Furthermore, the share of elderly people is significant: around 10% of Japanese tourists travelling to Finland as the main destination are over the age of 64, while the share is 4% for tourists from other countries (Visit Finland,



Photo Aana Vainio

2016e). Recently Japanese with a high income level have become more interested in Finland: especially families with salaries over €200 000 have increased their travel to Finland (Visit Finland, 2016d).



Photo Kaisa Merilahti

In Western Europe, the main destinations are competing on price, but Finland is considered an expensive country where destinations do not even try to compete on price. Even though the Japanese are more price-variation sensitive than other Asians (Nepa, 2016), they appreciate high quality, since there is no connection between low price and low quality in Japanese culture (Sharp, 2013). Tourists from Japan are the third-highest spenders in Finland, and Japan is one of few countries from which tourists have increased spending in Finland in recent years. Typically the Japanese pay for services in advance (80%), including hotels and restaurants, mobility, and cultural and recreational services. Products, meaning shopping and food, account for 20% of their budget. Japanese visitors spend around €442 per trip per person, which is significantly more than the average €300, but less than for Chinese visitors, €656. However, the Japanese spend more money per day than visitors from any other country, €183, while the average is around €70. This would also suggest that Japanese tourists stay in Finland for a shorter period of time than visitors from many other countries. The average amount of spent money is higher if the destination is in other parts than in Southern Finland (Visit Finland, 2016c, 2016d, 2016e, 2016f).



Photo Sirpa Piskonen



Photo Aigar Pihho

JAPANESE TOURISTS IN ESTONIA

Japanese tourists make up just 0.72% of all accommodated foreign tourists in Estonia. They are at 15th place in terms of the number of nights stayed. In 2013, the record for overnight stays was achieved: 19 272 nights, an increase of 23% compared to the previous year. The number of overnight stays was 12 200-13 300 in the years 2007-2010, after which numbers increased more markedly as on 2014 comparing to 2013 53% (Table 1) (Statistics Estonia, 2017). According to the mobile positioning data (Eesti Pank, 2017) the total number of visits from Japan in 2016 was 99 335 and total length of visits was 190 478 days. The average length of a visit was 1.9 days.

Approximately 40% of Japanese tourists stay overnight in Estonia and 60% of these stay just for one night, 23% of accommodated tourists, 9%

of cruise tourists, and 8% of other accommodated tourists (2013). The research was conducted by Estonian Tourist Board (2014) in August and September 2014. There were only 46 respondents, but the results are congruent with the literature and previous studies (Figure 2). It was found that a significant number of visitors used public transport and excursion buses to travel around Estonia. The number of tourists renting cars was very low. Approximately 91% visited two or three other countries in addition to Estonia during the same trip, the most typical combination was Estonia with Latvia (69%) and Lithuania (64%). In addition to Estonia, 47% of the tourists visited Finland, and 27% visited other long-distance destinations, but very few visited Sweden or Russia (Estonian Tourist Board, 2014). Self-guided sightseeing was chosen by 91%

Table 1. Japanese accommodation statistics in Estonia (Statistics Estonia, 2017)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
accommodated arrivals	7 362	8 066	8 093	6 799	6 862	7 253	7 235	8 732	8 778	10 768	17 303	22 865	23 953
overnights	14 174	15 350	15 516	12 246	12 143	12 998	13 303	15 967	15 723	19 272	29 477	35 837	38 831

JAPANESE IN ESTONIA IN 2014

- 93 126 visitors, 1.68% of all visitors
- 39 103 overnight and 56941 same-day visitors
- 0.5% of all accommodated visitors
- 91% accommodated tourists were on holiday in Estonia
- 87% were in Estonia for the first time, 4% the second time, 4% the third time
- 18% had acquaintances in Estonia
- Age groups of respondents: 15-24 (9%), 25-34 (18%), 35-44 (24%), 45-54 (20%), 55-64 (22%), 65+ (7%)
- 26% stayed one night in Estonia, 28% 2 nights, 13% 3 nights, 28% 4-7 nights
- 95% used paid accommodation in Estonia, 5% used free accommodation, 14% were accommodated in destinations other than Tallinn
- 35% travelled to Estonia without an intermediary, 28% reserved some services through a travel agency, 37% used a package booked from a travel agency
- All those surveyed visited Tallinn, 22% also visited Pärnu (mostly during a short visit to Riga)
- The average spend was approximately €400 per person (31 respondents provided information on this).
- 14% of travel to Estonia met visitor expectations and 86% exceeded expectations. None said that it was below their expectations.

Figure 2. Japanese tourism in Estonia. Study conducted in August and September 2014. N = 46. Estonian Tourist Board, 2014.

of tourists to Estonia, 82% visited a restaurant, pub or cafe, 78% went shopping, 58% visited a museum, 38% went on excursions, and 13% attended cultural events.

Approximately 70-80% of overnight stays were from May to October. Most were in August there is the biggest share of staying nights: 16 – 21 % in recent years. Also May and October are popular. The lowest shares of staying night are in January and February. In period November-December and March-April the shares of staying nights are approximately 3 – 4 % every month. However, the season has wide shoulders (Statistics Estonia, 2017).

The number of tourists accommodated in hotels has decreased in recent years, while hostels and guesthouses have become more popular. The majority of tourists still stay in hotels (87.7% in 2013), but 5.6% of Japanese tourists are accommodated in hostels and 5.7% in guesthouses. In Tallinn in 2013, 25% of Japanese tourists were accommodated in 5 star hotels, 38% in 4 star hotels, 25% in 3 star hotels and 13% in lower-price hotels. Only 13% of overnight stays were spent in other types of accommodation. Japanese tourists use more 4 and 5 star hotels than other visitors (Statistics Estonia, 2017).



One log boat trip in Soomaa.



Soomaa fifth season, levels of flood.

Most Japanese tourists stay in Tallinn and a minority in the Saare County (Saaremaa), or the cities of Tartu or Pärnu. The relative importance of Tallinn has remained consistent in recent years (96%). The share of Tartu was 2%, decreasing from a peak of 6.3% in 2009. In 2013 the share of Pärnu and Tartu was 1.9%. The market share of other towns and counties was marginal (Estonian Tourist Board, 2017).

Many Japanese visitors come to Estonia from Finland or Sweden. It is very convenient to fly to

Tallinn from Helsinki or use the Tallink, Linda Line or Viking Line ferries. Indeed, Helsinki-Vantaa airport should be considered as a hub to reach the Baltic countries. The ferry/cruise companies are also important partners. For example, Tallink is active in Asia and has web pages in Japanese. There are no chartered or direct flights between Estonia and Japan, which mostly explains the low levels of Japanese tourism in Estonia. In 2014 there was just one chartered flight took place (Estonian Tourist Board, 2014).

JAPANESE TOURISTS IN LATVIA

Destinations in Eastern Europe, such as Latvia, have increased their European market share (Visit Finland, 2014c). Since 2004, the number of Japanese visitors has increased four-fold in Latvia (Table 2). The statistics show that the global financial crisis in 2007 - 2008 had a serious impact on the number of Japanese visits: the visits started to convincingly increase again after 2011. In 2016, Latvia was visited by 23 191 Japanese tourists, and this is 49% more than in 2014 but only 7.5% more than in 2015. The proportion of Japanese tourists using the services of Latvian rural tourism companies varied a lot according to the statistics: in 2013 it was 2 245 people, in 2014 just 896 people and in 2015 it was 5115 people (Central Statistical Bureau of the Republic of Latvia, 2016; 2017). More details are presented in Figure 3.

Despite the fact that the number of Japanese tourists in Latvia is increasing annually, around 20% of them visited for just one day (4312 in 2015). Indeed, the length of the visits, which was estimat-

JAPANESE IN LATVIA IN 2015

- 21 575 visitors, 1.46% of all visitors (increasing trend)
- 17 263 overnight and 4 312 day visitors (average length of a visit was 1.39 days)
- 37% of travellers came to Latvia in the summer months (June, July, August), however the largest proportion of travellers came in May: 15%
- 24% of Japanese travellers used the services of Latvian tourism companies (increasing trend)

Figure 3. Japanese tourism in Latvia. Selected statistics (Central Statistical Bureau of the Republic of Latvia, 2016).

Photos Country house Piekūni



ed by the total overnight stays compared with total number of visitors, has remained practically same and it has even decreased a bit during the last two years. The average length of visit was 1.59 days per person in 2004, but in 2015 and 2016 it decreased to 1.39 days per person. This could be explained by the development of transport and communications in the Baltic countries which allows Japanese tourists to plan their stay in the Baltic countries more efficiently by combining the visits with neighbouring countries (Central Statistical Bureau of the Republic of Latvia, 2016; 2017).



Photos Lauku celotajs archive

Table 2. Japanese in Latvia (Central Statistical Bureau of the Republic of Latvia, 2017)

Total number of Japanese visitors												
2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
5677	5732	5249	6065	6043	6690	5428	5843	7322	8988	15606	21575	23191
Overnight stays of Japanese visitors												
2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
9031	9514	9960	9571	10521	11967	9680	9924	12765	15776	24798	30033	32387

JAPANESE TOURISM MARKET SEGMENTS

TYPES OF JAPANESE TOURISM IN GENERAL

The type of holiday taken by Japanese tourists has changed markedly during the past decade from beach resort-based trips to touring and city breaks. Whereas in 2002, 26% of the holidays were at beach resorts, this share had fallen to 10% in 2012. Conversely, touring holidays had risen from 49% to 58% over the same period, and city breaks from 13% to 21%. Touring holidays are popular among the 20-30 and over 60s age groups, while city breaks are taken mainly by Japanese people aged 30 to 60. Three quarters of Japanese holidays to Europe are tours, 15% city breaks and 10% other types. There is evidence that the trend changed in 2013 with a return to demand for beach destinations and fewer touring trips, leading to a reduction in the average trip duration to 6.1 nights (Messe Berlin GmbH, 2013). These changes in Japanese tourism are partly following wider trends and megatrends. Indeed, the Future Foundation (Amadeus, 2015) has identified six worldwide tourist types for the year 2030: simplicity searchers (easiness and safety), cultural purists, social capital seekers, reward hunters, 'obligation meeters' and ethical tourists.

The different travelling groups are changing over time, influenced by new trends and megatrends. Modern humanists are an example of a new and growing target group. Modern humanists have travelled a lot, have high incomes and appreciate experiences, responsibility and self-development. Modern humanists make up about 15% of all tourists globally (Rannisto, 2012). The modern humanist can also be identified among Japanese tourists. The typical Japanese target groups are presented below. The European Travel Commission (ETC) report, Market Insights Japan (2013) details the segments of the Japanese market as identified through its travel trade research as:

- **Retired couples and widows:** The growing numbers of over-65s who have the leisure and wealth to travel frequently and at length;
- **'Salarymen':** Committed corporate employees travelling for business purposes but taking the

opportunity to pursue leisure activities. Generally men in their 40s and 50s: younger men suspect that they may prejudice their careers if they spend time abroad unless the trip provides an educational experience;

- **Middle-aged couples:** A segment that seems to be growing in recent years, perhaps as the corporate work ethic loses some of its allure;
- **Three-generation families:** Japanese grandparents often travel with their grandchildren, especially when parents find it difficult to take time off for holidays. Increasingly, however, holiday parties may contain all three generations;
- **Young women:** Independent women in their 20s and 30s, usually still living at home (and so with greater disposable income for travel) – enthusiastic tourists and shoppers, with the highest propensities to travel among all the Japanese,
- **Young men:** Unlike their female counterparts, overseas travel does not seem to be part of their culture, especially since many are concerned about getting on the career ladder. When they travel, they often travel with groups of friends or for educational purposes;
- **Honeymooners:** The number of newly-weds taking their honeymoons abroad is declining – partly because of a decline in the young population, and partly because of changing preferences and lifestyles.

The ETC report identifies target groups by age or life stage. In contrast, the Canadian Tourism Commission (Japan Market Profile, February 2013), divides the Japanese long-haul market into three categories, each of which seek different experiences. Canada attracts a greater proportion of young travellers aged between 18 and 34, but older travellers aged 55+ represent the largest segment of intend-ers. Therefore the primary focus of Canada is on

older tourists and young tourists constitute a secondary focus. The Japanese tourist target groups in Canada are:

- **Free spirits** are attracted to exciting experiences they cannot find at home, including learning about other cultures and customs and trying different cuisine. Travelling provides an opportunity to take a break from their daily lives and be a little more indulgent.
- **Personal history explorers** are open to different cultures and want to experience what it is like to live as the locals do. They will carefully research the history of a destination before visiting. They are more comfortable travelling with a guide because of their security concerns.
- **Cultural history buffs** travel as much as possible and tend to take longer holidays of at least two weeks. They immerse themselves in the local culture by learning the language and veering off the beaten track. They will avoid organised tours in favour of independent travel.

KEY MARKET SEGMENTS IN FINLAND, ESTONIA AND LATVIA

Overall, the change from beach holidays to city breaks and the megatrend of modern humanists are reflected in the Japanese tourism in Finland, Estonia and Latvia. According to Nepa (2016) and the report of Visit Finland (2016f) the typical Japanese visitor to Finland is young (over 55% are aged

35 or under) brings their children and likes to travel with a group. These tourists have a high income, good education and have often visited Finland before. Around 40% travel with their family, 25% with friends, 24% alone and 10% with a tour group. Purchasers of Finnish winter tourism products are from all generations, from 20-year-olds to 70-year-olds, but women are the decision makers (Visit Finland, 2016e).

Research by Kaljuste (2016) shows that the majority of tourists in Estonia and Latvia are older (aged 60+) and travelling with groups (Tables 3 and 4). This group is significant as they have the time and money to travel. They often travel as a group from different clubs, choirs or other groups. Poor language skills, the sense of safety and habits are all reasons for group travel. In Latvia these Japanese tourists are mainly elderly people walking through the city and visiting the attractions. In contrast, individual travellers are younger, mostly under the age of 50. Typically Japanese tourists need a lot of information about the destination and want to visit several countries. Therefore, it would be beneficial to market the Baltic countries together with Finland (Kaljuste, 2016). Young women are a particularly promising potential target group. Women aged 30-40 are interested in handicrafts, culture, and historic buildings, and safety is important to them. The third significant group is couples: married couples, mother-daughter and female friends. Women also dominate this group. The market share of business travellers is growing, although it is still small, and travellers stay mainly in Tallinn (Kaljuste, 2016; Tropp, 2015).

Table 3. Types of Japanese tourists visiting Estonia (Kaljuste, 2016)

Individual (single) tourists	Group tourists	Business tourists
<ul style="list-style-type: none">■ Single tourists, families, groups of friends■ Mostly under 50, equal proportions of men and women■ Some of them have arranged part of the trip	<ul style="list-style-type: none">■ Groups of 10 or more■ Usually aged over 55 and mostly women■ The entire trip arranged by a travel agency	<ul style="list-style-type: none">■ Single business tourists or groups of business colleagues■ Aged 30 and over, but most are older people■ The trip is arranged by their company

Table 4. Japanese tourists' attitudes to Estonia (Kaljuste, 2016)

	Individual (single) tourists	Group tourists	Business tourists
Motivation to visit Estonia	To discover new countries; Baruto (famous sumo wrestler); interest in history; acquaintances have had good memories; youth exchange programmes; a safe country	A desire to discover new countries; Baruto; interest in history; suggestions from a travel agency and advertising; acquaintances have had good memories; a safe country	Business
How did they decide to visit Estonia?	They decided to travel to Estonia from Finland, or they were offered a day trip to Estonia while touring in Finland; interested in visiting several countries	A travel agency made choices regarding the trip for them; did not choose Estonia in particular but a tour of the Baltics, Finland-Tallinn-St Petersburg tour, or a Baltic Sea cruise during which the ship stops over in Tallinn for a day; interested in visiting several countries	Through business contacts
Knowledge of Estonia	More knowledgeable than group tourists; have looked up a lot of info in advance	Old Town of Tallinn; Kihnu Island; researched info on aspects of local life before the trip	Old Town of Tallinn
Interests in Estonia	Old Town of Tallinn; Kihnu; natural environment; peaceful living environment; history; low population concentration	Old Town of Tallinn, Kihnu; local life; museums; sometimes Lahemaa, Tartu, Saaremaa and Hiiumaa	
Planning of the trip to Estonia	Time for planning the trip varies; research prior to the trip and look for information on places they want to visit; use travel agency services only in part (for some components); length of time spent in Estonia is very varied	Buy a package tour compiled by a travel agency; time is limited, usual stay in Estonia is 2 days	The entire trip is planned by the company and its duration depends on the purpose of the trip
Opinion on marketing Estonia together with neighbouring countries	Wish to visit several countries since Estonia is a long way from Japan, or a visit to several countries derives from having no direct flights from Japan to the destination	Usually a trip to Estonia is combined with visiting Finland or other Baltic States, but may be combined with other countries	
Aspects of Estonia which respondents liked	Nature; abundance of woodlands, clean air and low population density; Old Town of Tallinn; tasting local food; clean toilet areas; Ahhaa Centre (science centre in Tartu); Lottemaa (theme park near Pärnu for children); local life	Nature; abundance of woodlands, clean air and low population density; Old Town of Tallinn	



Photos Valdis Ošiņš

The European Travel Commission (2013) defines that the most important tourist groups as, firstly, women, especially younger women, and secondly, elderly, retired people. These two target groups are important for Finland, Estonia and Latvia too, but studies and reports from these countries identified a third significant target market segment: intergenerational groups and families. These three target groups for Finland, Estonia and Latvia are presented next. It should be noted, however, that each of the study countries also has potential niche target groups: manga, music concerts, movies or other hobbies could all be of interest to Japanese tourists, according to Mannonen (2015).

Younger women: Puhakka (2011) and the ETC (2006) expect that the significance of the younger generation will increase in the long term. Young and independent Japanese women in their 20s and 30s, as well as younger women aged 20-50, are the key new target group. These women can be single and living with their parents, which leaves them more disposable income, or they have higher incomes and education than older Japanese women (Clammer, 1997; Visit Finland, 2014a). According to The Japan Times (2014), young women want to postpone marriage, and to have a career and experiences first. These women are accustomed to

travelling independently and they prefer shopping and city holidays without a precise programme or big groups. They can stay for a long time (up to six to seven nights), especially if the accommodation is unique. They want to behave like locals and integrate into the local life ('live like locals'). Accommodation options can range from youth hostels to five star hotels. Japanese women typically travel with a friend or spouse. Women are typically more active and price-sensitive consumers and more often follow rapidly changing trends. They are also considered as the trendsetters of Japanese tourism (Matkailun Edistämiskeskus, 2014; Visit Finland, 2014a).

According to the survey of Visit Finland (2014a), women with higher incomes and education are more interested in Nordic countries as destinations. Those women who are interested in or have visited Nordic countries are a core target group for Finland, Estonia and Latvia. Half of the members of this group have children and many are full-time mothers and housewives (Visit Finland, 2014a), but typically women are in charge of family expenditure (Clammer, 1997). These women can be modern humanists. They are active travellers: single women and couples aged over 35 without children are more frequent visitors to the Nordic countries.

Around 60% of the core target group members have a strong identity as a traveller. They have travelled a lot, they know what they want from destinations and they have high expectations. For this core target group, the most interesting themes in Finland are architecture, culture, food and experience of untouched nature. These women also make careful preparations before the trip and they draw on several sources of information. They want to see multiple countries and they are willing to spend more money than usual. Independently organised holidays are 57% of all holidays in Europe, and women travelling to the Nordic countries prefer to visit in several countries. Indeed, many of those who have visited Nordic countries have visited more than one (61%). Nearly two thirds (63%) of them have visited Finland, three quarters (73%) Sweden but only one fifth (20%) the Baltic countries, and few have visited Finland alone (10%). Couples without children are especially interested in the Nordic countries but Baltic countries are more interesting to tourists who have already been to Finland and Scandinavia or who are single. Compared with the Nordic countries, the Baltic States are less well known and visited, and women are less interested in travelling there (21% to Baltic countries compared 50% to Finland or Sweden, Visit Finland, 2014a). Tallinn is the most attractive destination in the Baltic States (Nepa, 2016). In Estonia, novelty and new experiences attract women (Tropp, 2015). In Finland, the core group is mostly interested in the aurora borealis (northern lights), midnight sun, food and Santa Claus. Natural environment, including lakes, snow and forest are also in the top ten. Earlier experiences in the Nordic countries change the interest list only a little but mostly those who have already visited are more interested in food, design, architecture and sauna. Still, the aurora borealis are considered the most tempting in the experienced group (69%) and the interested group (79%) (Visit Finland, 2014a, 2016b).

Elderly people: Members of this group have the leisure and wealth to travel frequently and at length (tours). Senior passengers are fascinated especially by the nature (Maine International Trade Center, 2015; Matkailun Edistämiskeskus, 2014). Language is still a problem among elderly Japanese tourists but the problem is decreasing. This group appreciates safety, routine, guides and group travel. Elderly Japanese travellers can be retired couples or widows. Older married couples are a key target group for short holidays, especially for one or two day summer trips to Finland. This target group is growing: trip length is getting longer and the average age is increasing (Visit Finland, 2016a). How-



Photo Ruralia Institute

ever, both Puhakka (2011) and ETC (2006) expect that the increase will stabilise in the long run. The latest official statistics for Japan show that the birth rate is staying low or decreasing and the population is aging faster than anywhere else on the planet. In 1989, 11.6% of Japanese people were aged over 65. In 2006 this figure had risen to 20%, in 2014 to 26%, and it is predicted to increase to 38% by 2055 (Official Statistics of Japan, 2014).

The significant role of elderly visitors will affect the tourism business. The general assumption is that they are youthful, they keep up with the times and do not correspond to the general idea of the senior citizen. Indeed, You and O'Leary (2000) revealed that today's senior Japanese market seems to be more experienced, values overseas travel more, and has overall higher activity involvement than their cohort did 10 years ago, suggesting that Japanese tourists may be more diverse than has been thought and has been shifting over the years. The elderly have time, energy and money, and have experienced and perhaps travelled a lot, although elderly Japanese people are claimed to be frugal (Sharp, 2013; Nepa, 2016, Pasanen & Pesonen, 2016). This might change: because of the recent terrorist attacks, consumer priorities have shifted to

destination security, making prices and other factors less important (Visit Finland, 2016a).

According to Nishimura et al. (2006), travel guides are the most popular sources of destination information but brochures and travel agencies are significant, especially for elderly Japanese tourists. Although Nishimura's research is quite old, it highlights the importance of social contacts. Elderly Japanese tourists travel frequently as part of a larger group or on tours, which gives them a sense of social contact, security and community. Elderly visitors have extended the tourist season into autumn (September-November). Tallinn day cruises have also added to the variety of travel destinations. In the near future the former younger group will become the elderly group, and this will change the nature of this target market: the elderly tourist of the future will be more like the modern humanist.

Multiple generations or family tourists are the third core target group. This group includes a) mothers and adult daughters, b) grandparents (typically grandmothers) with grandchildren, c) groups of three generations (an increasing trend) and d) young families (parents under the age of 35) or couples without children. Families prefer

Lapland, nature, wellbeing, the aurora borealis, the Moomins and Santa Claus. They also emphasise the importance of good accommodation. For the young couples, honeymoon is a typical time to travel abroad but this group is getting smaller. Middle-aged and young Japanese visitors without children are especially interested in the Nordic countries, and they have typically already visited Finland. City holidays are the most popular in the 30 to 60 age group. Young couples without children are also a core group for Visit Finland. Young Japanese tourists are especially looking for experiences, natural phenomena, special/historic sights, aesthetic images to share on social media, and great souvenirs to take home to family, friends and acquaintances. The Internet, blogs, social media and social contacts are becoming increasingly important information channels for (young) Japanese tourists to create an impression of their destination, but also as a source of information for making travel plans (Ikeuchi-Peltonen, 2015; Korhonen & Tuovinen, 2015b; Pasanen & Pesonen, 2016). According to the ETC (2013) statistics, the Japanese travel to Europe with family or a spouse (59%), with friends (25%) or alone (17%).

IMAGES OF FINLAND AND ESTONIA THROUGH JAPANESE EYES

IMAGES OF FINLAND

According to the study conducted by Moilanen and Rainisto (2008) Japanese impressions of Finland comprise cleanliness, the birthplace of the sauna, the Moomins and Finland as a Nordic country. These images are permanent and will not change rapidly, but still need to be clarified. Indeed, Japanese respondents mentioned several points that could be highlighted to develop the image of Finland: food, skills for the Japanese tourist market, the exploitation of famous people and places (such as film director Aki Kaurismäki, peace negotiator Martti Ahtisaari, composer Jean Sibelius and the other figures or destinations for pilgrims and fans) and expanding the scarce tourist services. The majority of Japanese people see the Scandinavian

countries and Finland as almost the same and therefore separating Finland from the neighbouring countries in images can be a challenge (Moilanen & Rainisto, 2008). Other surveys support this result: the image of Sweden is of cultural cities, whereas Norway and Finland were seen as the place for wild nature, lakes and Lapland (Rannisto, 2012). Internationally, however, Finland has a slightly clearer image than the other Nordic countries (Moilanen & Rainisto, 2008).

Korhonen and Tuovinen (2015b) researched the images of Finland in the eyes of Japanese young people aged 18 to 30. They found that around 60% of Japanese young adults have travelled abroad more than five times and they are eager to continue doing so in future. The three main reasons for

Photo Pasi Komulainen



travelling are the need to experience something new (68%), separation from everyday life (62%) and a better understanding of a foreign culture (59%). These results are consistent with surveys by travel agents. The ETC 2006 survey found that for Japanese young people, the Internet is the main source of information (96%), the second source is family and friends (55%) and the third is social media (36%). Obstacles to travelling are expense and general insecurity because of terrorist attacks. Language problems do not concern younger Japanese people as much as their older compatriots. The most attractive destinations are exotic and famous. Korhonen and Tuovinen (2015b) also asked respondents to mention images of Finland. The most popular were of nature (beautiful nature, lakes, cold weather, reindeer and the night of the midnight sun) and design (Marimekko, Aalto, Iittala, and Arabia). Also social themes (friendly people, good education system, wellbeing and equality) and food (cinnamon buns, salmon, salmiac [salty liquorice] and berries) were often mentioned. The most popular single things were the Moomins, aurora borealis, Marimekko, Santa Claus and the sauna. However, Rannisto (2012) claims that long distances, expense and difficulties in combining culture and nature, namely Lapland, are seen as disadvantages of Finland.

IMAGES OF ESTONIA

Estonia has the image of a novel destination. According to Tropp (2015) Japanese people who have visited Europe would like to discover a new and exciting destination such as Estonia. She found that the most suitable image for marketing Estonia to Japanese is as a culture and city holiday destination. Nature and wellness products can be added but they have to be branded very well. For instance, in Japan, South Korea is a popular destination for cosmetic surgery and Thailand for massages. These destinations are well-known for these services and therefore attractive, but Estonia is not seen in the same way. Furthermore, there are companies in Japan specialised in nature tourism.

Tropp also discovered that blogs were becoming more popular and therefore a more important source of information for Japanese tourists. Furthermore, many of them have heard of the Estonian



Photo Hanna-Maija Väisänen

sumo wrestler Baruto, and therefore of Estonia. The third source of information and images is media: groups of filmmakers, journalists, and bloggers visit and write about Estonia.

The Japanese market is demanding and it may take a long time to develop relationships with Japanese companies and people. Since Japanese tourists are aware of health and environmental issues and appreciate natural and hand-made products, Estonian products are at an advantage. Lack of knowledge about Estonia can be even advantage in competition. People are always looking for something new and interesting. This does not mean that success is guaranteed, however. As Estonia is not well known in Japan, Estonian companies must work harder and offer more innovative products or services, better quality and a more flexible attitude (Lega, 2016).

ACTIVITIES AND THEMES OF INTEREST TO JAPANESE TOURISTS

FINLAND

Visit Finland has divided the country into four tourist areas. These are Helsinki, Lapland, Finnish Lakeland, the coastal and island regions. Lapland is the whole of Finland north of Oulu. Lapland is pictured with the midnight sun, autumn colours and northern lights. Finnish Lakeland includes most of southern Finland but not the coasts. Lakeland Finland is marketed with the Savonlinna Opera Festival, cottage holidays and steamboat cruises (Visit Finland, 2015c). The coastal and island regions are presented with the pictures of the Åland Islands, lighthouses and old towns (Visit Finland, 2014b). Most Japanese tourists (over 90%) visit Helsinki and only a small percentage travel to other parts of Finland, mostly Lapland, which is the main target for over 40% of Japanese visitors in winter. In summer, visits include typically several countries, but in winter Finland is the only destination and the stay

is longer. In summer 82% of the visits are to the Helsinki area and 7% to Lapland but in winter these numbers are 48% for the Helsinki area and 44% for Lapland. Both group and independent travellers prefer the Helsinki area but package holidays are typically in Lapland. Lake and coastal Finland are destinations for only 4-5% and their share has been in decline. Overall summer holidays are the most popular (70%) although autumn and winter have increased their share recently (Visit Finland, 2016c, 2016f). Nepa (2016) already claim that autumn and winter packages are the most popular. More tourists wishing to see the northern lights are travelling in the autumn period (September and October) and this trend will increase the overnight stays in Lapland. This means that the tourist season will become longer. Indeed, the keys to success are the seasonal variations and diversity of client groups (Visit Finland, 2016a, 2016b).

Photo Sirpa Piskonen



Many researchers identified unspoilt, different, and impressive sites, the natural environment and unique sense of space as motivating factors for tourism. All in all, Finland was seen as an exotic and distant country whose natural and cultural points of interest offer a “voyage of discovery” (Rannisto, 2012). Clearly, the most frequently-visited tourist destination in Finland was Lapland, because of the unique natural environment and northern lights. Other attractions were the midnight sun, lakes and general tranquillity. Nature tourists expect to see an exotic natural environment. Nature is seen as the opposite of the tourists’ own (often stressful) everyday urban environment (e.g. Rannisto, 2012). For example, in Japan, ‘forest baths’, berry and mushroom picking have been known to promote wellbeing for a long time, and wellness tourism is increasing. According to Japanese travel agents, however, seeing a specific natural phenomenon is the most important motivation for travelling Finland. For example hiking is also interesting for those Japanese tourists who do not otherwise take much exercise. A sauna by the lake is exotic activity after hiking (Ikeuchi-Peltonen, 2015; Korhonen & Tuovinen, 2015b). According to Varamäki (2004) and Jurvakainen (2016) Restaurant and Tourism Management, Bachelor’s Japanese stereotypes support the image of Finnish nature, but cultural sights are also appreciated.

Japanese people are interested in Finnish cultural attractions and they visit sights such as the Helsinki Lutheran Cathedral and Suomenlinna Island. Research has indicated that tourists from Japan are not as interested in the Finnish culture as the Chinese and South Koreans are, although Moomins and Santa Claus are well known (Jurvakainen, 2016; Varamäki, 2004) Restaurant and Tourism Management, Bachelor’s. Japanese tourists are not significantly interested in Finnish food and only a little interested in taking a sauna. However, the core target group of Japanese women appreciate the Finnish food and sauna. While another survey claims that sauna is the second most interesting experience, less than one in ten tourists had actually experienced a sauna (Visit Finland, 2016c).

Finnish design has become a more important theme during the last few years. For example Alvar Aalto, Iittala and Fiskars are popular brands. Japanese visitors appreciate the Finnish origin of the product whereas Chinese tourists, for example, care more about its European origin. Typical purchases are natural wood and wool products with natural colours, Moomin products and design (Nero Partners Oy, 2016; Visit Finland, 2016c).

Nepa (2016) claims that for Japanese tourists, key motivations for package selections include experiencing the real Finland, pure nature, natural attractions, peace and quiet, Finnish culture and good value for money. The most popular travel packages are low- to mid-price. The city of Helsinki with food and culture, or the aurora borealis, are the typical and popular packages. The more expensive but still popular packages are visits to Lapland and Santa Claus or they are mostly nature-based activities. The most popular products, the aurora borealis and winter outdoor activities, attract more than 15 000 Japanese tourists to Finland every year (Nepa, 2016; Visit Finland, 2016b). Canada, Alaska and Iceland are tough competitors for visitors wanting to see the northern lights and New Zealand competes on nature. All these countries have a strong image as safe and terrorist-free (Jang et al., 2002).

According to the reports of Nepa (2016) and Visit Finland (Visit Finland, 2016d) Finland is suffering from perceptions as a difficult destination. The most important difficulty is language. Japanese people, especially older people, do not prefer English and therefore appreciate a local guide who speaks Japanese and informative web pages in Japanese. The other difficulty is in organising the trip. More tour operators and travel agents need to organise packages, provide pre-arranged solutions and to make a stopover in Finland ‘hassle free’. Japanese tourists appreciate quality and have high expectations and quality requirements for long distance travel (Nepa, 2016; Visit Finland, 2016d). Porrasmaa (2012) reminds us that Japanese people are also used to good customer service and appreciate very polite behaviour. In addition, there is still a lack of understanding about the appeal of Finland in Japan. There is therefore a need for purposive positioning of Finland to potential tourists as a destination with unique activities, including nature-based activities. This has been the very focus of recent campaigns organised by Visit Finland in Japan: Lapland and the aurora borealis, Finnish Lakeland, and the Moomins (Visit Finland, 2014b).

ESTONIA

The attractions and experiences Japanese tourists would like to discover, according to Tropp (2015), are the following:

- Tallinn medieval Old Town, a UNESCO World Heritage site. UNESCO is well-known and is seen as a quality brand. It is interesting as there is nothing like it in Japan. The Old Town is seen as fairy-tale and museum-like, different from

old towns in other European countries. One popular attraction is the view of the city from the Toompea Hill viewing platform.

- A key aspect is the 'local people'. The Japanese and Estonian people are similar: Estonians are not too pushy and that aspect creates a feeling of safety. Japanese visitors would like to make contacts with locals.
- Japanese visitors like things which are linked to Japan, for instance the Estonian Open Air Museum, because the old houses on display look like traditional architecture in Japan and the furnishings appear familiar. Another link between the two countries is the similarities between the Japanese Shinto religion and Estonian Maausk.
- Traditional handicraft. Japanese (mostly women) like Kihnu and Muhu embroidery, and the Haapsalu knitted lace shawl. Some are interested when traditional patterns are used in modern design and clothes.
- Manors: renovated, in wild natural settings, with history and legends.
- Estonian nature (wilderness). Excursions are felt to be too Tallinn-oriented. Experts suggest adding trips to places like Viru bog, Kihnu, Saaremaa and Haapsalu. Product ideas could include autumn colours in South Estonia, or visiting a snowy forest. One expert suggests walking on a wooded path in the Viru bog, but not long hikes for safety reasons. Other options include stork nests – Japanese tourists are ecstatic on seeing them, as they believe the stork brings children good fortune.
- The e-state is unique and differentiates Estonia from other countries. E-parking could be demonstrated to tourists.
- Eco-living, rustic living, and smoke saunas: a sauna with swimming in the lake could be a special experience.
- Food made from local fresh and pure products.

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Language is a problem also in Estonia: in Japanese eyes, Estonia is still considered as a part of Russia, due to the history of the country, and it is expected that people speak Russian. Therefore a Japanese-speaking guide is seen as important. The guide is a trusted person whose opinion is important also in shopping for souvenirs. Japanese tourists buy souvenirs for their family, friends and colleagues. Popular choices include sweets (Kalev sweets, chocolate, marzipan), woollen products (gloves, scarves particularly), linen products, products with embroidery, the Haapsalu lace shawl, products with patterns from national costume (bags, purses), wooden products (wood is valuable in Japanese culture), ceramics, food products (honey, products made of

berries, kama) and beauty products with natural ingredients. Stories about origin and properties are important for Japanese. For instance, Kalev sweets have a long history, Kihnu knitting patterns have meanings and represent a cultural tradition, the Haapsalu lace shawl patterns have meanings, juniper wood has purifying properties, and marzipan was used to cure broken hearts in medieval times. In the marketing communication targeted to Japanese tourists, telling stories is an essential aspect. Therefore, stories should be developed that contain interesting facts for the target groups and create positive emotions in relation to Estonia. The stories should then be attached to Estonian products, including souvenirs (Tropp, 2015).

TRENDS IN JAPANESE TOURISM

FINLAND

The recent safety issues at several popular travel destinations in Western Europe have shifted the travel trend to Eastern and Northern European countries. Finland and the other Nordic countries used to be seen as too expensive for a family holiday but since safety has become more important, Finland is considered a natural destination. This trend is expected to continue but it is unclear whether it is a global megatrend (Noto, 2016a, 2016b). Although these trends are seen as new, Jang et al. (2002) identified same kind of segments in the market a long time ago: novelty/nature seekers, escape/relaxation seekers, and family/outdoor activities seekers. In the future, these seekers can become adventure lovers, and will be ready for new destinations, but at the same time safety will remain a concern (Puhakka, 2011; Yeoman, 2008).

The second trend is about origin and naturalness: organic food, interaction with local people, and shopping for local products at small markets are becoming more widely appreciated. These are considered long-term megatrends (Noto, 2016a). This kind of movement is seen also among Lohas (lifestyles of health and sustainability) consumers, which are a growing group (Hienonen, 2010; Kauppinen, 2010). Adventure and experiences are the keys to consumption today, as Raijas and Repo (2009) have shown. It has been argued that intangible experiences are displacing the consumption of goods and that this is the megatrend of the near future. The ETC report (2013) claims that purchases have lost their significance for others than young Japanese women, while according to Mannonen (2015) the significance of the food (aesthetic) has increased as a motivation for Japanese travellers.

Photo Jari Viitaharju



According to Noto (2016a) rural tourism is a European-wide trend. The Japanese are turning their attention to experiencing the countryside and rural activities, but the trend is not yet reflected on the actual travelling products. In Japanese newspapers, themes related to rural tourism have increased recently. Also Visit Finland (2016a) reports that the megatrend towards the countryside, rural and natural organic products is taking off slowly in Japan. This will affect tourism products in the future. Nature tourism has included adventure activities and fishing for a long time, but the new subject of interest is canoeing and wellness products. Furthermore, the demand for safe extreme activities, passive sport activities and genuine nature experiences is increasing (Puhakka, 2011; Thomson, 2004).

ESTONIA

Tropp (2015) has listed several trends, movements and characteristics that can be used in marketing Estonia:

- The main criterion for choosing a destination is safety. Estonia does not have natural disasters, war, strikes, or big events where people may act violently – these aspects are important. People are friendly but not pushy, which Japanese visitors appreciate. Shopping can be done without haggling, unlike in Eastern countries.
- Quality: Japanese tourists expect this abroad, as they are used to it at home. They value quality in service, food and hotels, which Estonia has, and this should be emphasised.
- Novelty: Estonia is a new destination for the Japanese tourists.
- Estonian traditional song and dance celebrations (Laulu- and tantsupidu), history and stories.
- Cleanness, naturalness, nature-centred: Estonia is much cleaner than the large metropolises of Europe. Even in Tallinn there are a lot of green areas and parks. Estonia is not too crowded. Even though Estonia is rather modern, there is a lot of naturalness. Harmony is an important concept for Japanese people and it should be used when introducing Estonian nature.
- Proximity to Finland and the rest of Europe.
- Estonia is a seafaring nation (mereriik), as is Japan. Ferries go to Stockholm, Helsinki and St Petersburg from Tallinn.
- Tallinn's medieval Old Town should be marketed with a fairy-tale theme, and as a UNESCO World Heritage site.
- The e-state and rapid development of the state. Successful Estonian-Japanese collaboration on electric cars and ID cards should be emphasised. Robotics is popular in Japan and elementary schoolchildren in Estonia already get some teaching in robotics.
- Diversity: Estonia is small country but visitors can experience very different things, including ancient culture, modernity, diverse nature, manor houses, cuisine, and encounters with local people.
- The sumo wrestler Baruto is very well-known in Japan. He has a very good image and is known as a friendly and approachable person. It is known that he comes from a Baltic State, but people are not sure about which country. He could represent Estonians very well.
- Secrets and surprises: to young people, Estonia can be successfully marketed as a mysterious place.
- Kawaii (cute in English): young women in Japan like cute things and cuteness. Japanese people see Tallinn's Old Town is architecturally kawaii. Restaurants, boutique hotels, handicraft and design shops can be marketed as kawaii as well.

RURAL TOURISM

A typical rural holiday in Finland, and mainly also in Estonia and Latvia, includes accommodation in a cottage, local food, a sauna and often some nature activities, such as hiking, walking in the forest, swimming, rowing or canoeing. Nature, particularly lake and forest scenery, is a self-evident part of a rural holiday. Rural tourists want to relax: they do not want the destination to be too crowded, but it should be safe for all family members. They want to enjoy beautiful landscapes, spend time outside in a rush-free atmosphere and without schedules. Visit Finland has recently exploited this by launching package holidays in rural areas of Eastern Finland such as Mikkeli and Savonlinna (Komppula, 2005; Pesonen et al., 2011).

Pesonen et al. (2011) conducted a survey about expectations of rural tourists to the Tyrol region of Austria and Karelia in Finland. These were both domestic and foreign tourists. Although the study did not concern Japanese tourists, the results are interesting. Organised programmes and trips have a clear positive correlation with relaxation and escape in Tyrol Austria: tourists value a variety of

things to see and do, daytrips to the neighbouring countryside and restaurants nearby. In Finland, rural tourists do not want organised programmes or trips, as these are not seen as relaxing or 'getting away from it all'. In Finland tourists appreciate visiting historic sites independently, or enjoying forest and lake landscapes. Furthermore, rural tourists in Tyrol value spending time with their family, but in Finland the once-in-a-lifetime experience clearly does not include family. Rural tourists in Tyrol seem to be more active, valuing experiences and adventure, whereas in Finland tourists seem to value relaxation and peace of mind more. Furthermore, in Finland, rural tourism is a product for the entire market, but in Tyrol it attracts more a certain customer segment. Some of these same trends can be seen among Japanese rural tourists.

JAPANESE RURAL TOURISTS IN GENERAL

The results of Pesonen described above support the findings of the ETC (2013) report: the preferred activities of Japanese tourists on trips to Europe are

Photo Aligar Pihho



natural and scenic attractions, historical and cultural sites, art galleries and museums, shopping, theatre, concerts and films, gourmet dining, rest and relaxation, hiking/trekking, and spa/beauty treatments. Many of these can be included in a rural holiday. However, the report of Visit Finland (2016d) reveals that tourists from Europe, North America and Australia are more interested in summer activities in the countryside than tourists from Latin America and Asia, especially Japan. Summer activities include biking, hiking, swimming, kayaking, sailing, cruising, fishing and wildlife watching. In rural tourism the summer (June to August) is the most important season. Furthermore, the tourists who are least interested in summer activities by or on water come from Asia, and again especially from Japan.

The motivations of Japanese tourists have been studied in many European countries. For example Andersen et al. (2000) claim that Japanese independent travellers to Scotland are motivated by new experiences (novelty), new cultures (understanding), and scenery but sporty activities are less popular. Krag (2014) argues that Japanese visitors to Norway are motivated by getting out of the city, relaxation, learning (not serious studying), experiencing something which is not possible in Japan, nature and especially the possibility to destress in a natural environment. Konu's (2015) research shows that Japanese nature tourists want to experience nature and the forest and this can be done through guided tours or 'soft activities'. These nature tourists are interested in significant sites and activities in Finland such as Koli National Park, Lake Saimaa and the castle Olavinlinna, lake cruises, berry picking and overnight stays in a cottage. They appreciate nature and want to experience it in the ways that the locals enjoy it (Ikeuchi-Peltonen, 2015; Matkailun Edestämiskeskus, 2014). Furthermore, the Japanese especially appreciate silence and peaceful moments without a rush (Konu, 2015). According to a 2016 survey conducted by the Latvian country tourism association Lauku ceļotājs (country traveller), approximately 82% of Japanese tourists experienced relaxation in the countryside, walking, and wildlife watching; 36% participated in craft workshops; 30% ate meals cooked by the landlord/landlady; 27% went on organised excursions around the local area; 23% experience a sauna, bath house rituals, or used spa services, and 9% picked berries or mushrooms. Indeed, Latvia has specialised in craft and culture oriented workshops (Zariņa, 2013). Kangas and Sihvonen (2011) argues that Finnish and Japanese people share the same high context culture, which means a high tolerance of silence and the body language instead of small

talk. These needs and this cultural coherence can boost rural tourism.

In addition to nature tourism, the second interesting part of the rural market is wellbeing tourism. This is a new opportunity for rural enterprises. It is an increasing trend, especially among the modern humanists, who avoid materialism, especially women. Rural wellbeing, according to Hjalager et al. (2015), includes holistic wellbeing, unselfishness and responsibility, integration with local nature and its' resources, balance between work and leisure time, rural tourism as a medicine for physical and mental health, versatile wellness, climate change, escape from digital life, simplicity, local products and by-products.

CHALLENGES IN RURAL TOURISM

The Asian market can be a challenge for rural tourism, but in Scotland entrepreneurs think positively about this: with a hotel and attraction infrastructure dominated by small and medium-sized enterprises, Scotland can also benefit from increases in both fully independent travel and gateway tours which combine security with independence of accommodation choice and routing after initial arrival (Andersen et al., 2000). Additionally, rural tourism enterprises are often run by part-time entrepreneurs who see their business as a hobby or lifestyle (Bensemann & Hall, 2010). The domination of small and medium-sized rural tourism enterprises is also a problem in Sweden and according to Suvanto (2016) smaller, part-time entrepreneurship and seasonal markets repress the vast majority of rural tourist enterprises in Finland. Rural tourist enterprises are therefore more suitable for independent travellers or small groups of women or families. Small groups or individual tourists, however, find it difficult to reach rural destinations, although distances are short in Estonia and Latvia. In the Lauku ceļotājs survey (2016), 79% of respondents used a private (rented) car, only 29% used public transportation and 4% taxi when arriving at their rural destination. Furthermore, they took short holidays, typically staying one night (39%) or 1 to 2 nights (39%). In Estonia, the Japanese tourists used rented cars less frequently and regular transportation and excursion buses were more popular (Estonian Tourist Board, 2014).

In addition to entrepreneurship, seasonal markets and distances, the labour markets are different in the rural areas. Young workers are a significant group in the tourism industry. Typically the local inhabitants start to work and take responsibility early on, which means that they have both valuable experience and job contacts when they finish school.

At the same time, the many seasonal, unqualified and low-paid jobs, including in tourism, make life vulnerable and insecure (Möller, 2012). Along with rural labour markets, seasonal markets create great challenges for rural tourism entrepreneurs. They are therefore interested in attempts to reduce the seasonal markets and the Japanese tourists who travel out of season are thus a very important target group. In Scotland, for example, local tourism enterprises have seen this opportunity (Andersen et al., 2000).

The Latvian study also found that typical information sources are not used for rural destinations: instead of the usual travel agent (12%), other tourists (9%) and brochures and maps (15%), the most important sources of information were either a direct reservation system (18%) or another source (46%) (Lauku ceļotājs, 2016). This means that webpages, Facebook pages and online reservation systems of rural enterprises should be informative, fresh and in many languages. Language is often a problem for Japanese tourists (Konu, 2015). For example, Finnish rural tourism enterprises often have too little information on their Facebook pages and the pages are also typically only in Finnish (Pesonen, 2011). Instead some municipalities and towns have noticed the potential of Asian tourists. One small municipality on the coast, Kemiönsaari (2016), for example, has Japanese webpages and their tourism strategy emphasises the Japanese tourist market for nature, culture and rural tourism (www.visitkimi-



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toon.fi). Even though rural tourism entrepreneurs face linguistic challenges, the main problems in the Japanese market are still visibility and awareness of the Nordic and Baltic countries, especially Finland, Estonia and Latvia (Konu, 2015).



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