

Potential target markets for (Nordic) transformative tourism products

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Aim of the study

- To investigate
 - Finnish and German consumers' interest in and willingness to pay for various Finnish transformative tourism products, and
 - What kinds of consumers are willing to pay a price premium of Finnish transformative tourism products.





Execution of the study

- The data was collected with an electronic questionnaire using a consumer panel during the spring of 2024
 - Finnish and German consumers over 18 years of age interested in Finnish tourism as a target group
 - 538 responses from Finland and 502 responses from Germany
- The survey consisted of three parts
 - In the first part, , the respondents were asked to use a seven-step Likert scale to assess claims (44 claims) about which issues are important to them on their holiday trip in general.
 - The second part focused on interest in transformative tourism and various transformative tourism services. The respondents were presented with 29 different Finnish tourism products and services that enable transformative tourism experiences.
 - In the case of six products, the respondents' willingness to pay for the products was examined – the respondents were presented with the market price of the product before responding, the response was made with a slide switch
 - The third section included background information of the respondents as well as questions about their personality traits



Results

- Both Finnish and German consumers are particularly interested in products related to local culture, history and lifestyle, or in connection with nature.
- These can be seen as influenced by the desire to learn new things, to experience a connection to nature, or to get to know new cultures and local history.

	TOP 10 most interesting Finnish transformative tourism products (products that can trigger transformation)	
	Finnish respondents	German respondents
1.	Self-guided/independent visit to an old cultural-historical site (fortress, etc.) (1.5 hours)	Self-guided/independent visit to an old cultural-historical site (fortress, etc.) (1.5 hours)
2.	Five-course dinner consisting of local traditional dishes and ingredients (2 hours)	Five-course dinner consisting of local traditional dishes and ingredients (2 hours)
3.	Guided forest trip to watch birds and animals: learning species identification (2 hours)	Guided husky safari in nature: stories about the animals and their well-being (1.5 hours)
4.	Immersing into the local lifestyle: learning about local cultural traditions and stories, and trying out traditional skills (e.g. baking pastries) (1 day)	Immersing into the local lifestyle: learning about local cultural traditions and stories, and trying out traditional skills (e.g. baking pastries) (1 day)
5.	Guided tour to a war historical site: hearing war stories related to the place (1.5 hours)	Guided forest trip to watch birds and animals: learning species identification (2 hours)
6.	Visiting a farm and meeting animals (1-2 hours)	Independent hike in a national park including overnight stay in nature (2 days)
7.	Participating in a programmed wellness weekend at a hotel or tourist destination with lectures, exercises, relaxing activities and healthy food (2-3 days)	Visiting a farm and meeting animals (1-2 hours)
8.	Guided forest trip to collect mushrooms and berries: learning species identification (2 hours)	A communal full-board holiday in a rural setting with like-minded people, enjoying various activities (games, campfire evenings, sauna, etc.) (5 days)
9.	Guided husky safari in nature: stories about the animals and their well-being (1.5 hours)	Visiting a museum / historical cultural attraction using an augmented reality (AR) application (using your own phone) (1.5 hours)
10.	Visiting a museum / historical cultural attraction using an augmented reality (AR) application (using your own phone) (1.5 hours)	Guided forest bath / forest meditation (2 hours)



Willingness to Pay for transformative tourism products

■ Tested products

- A roof walk on the roof of a high-rise building, where you can view the city centre from a bird's-eye view and learn about the history of the city using a headphone (duration 1 h);
- Cooking course for local food (3 h);
- Guided forest bathing/forest meditation (2 h);
- Guided husky safari in nature: stories about animals and their well-being (1.5 h);
- Shepherd holidays: herding sheep or other animals in the natural environment, doing the traditional chores of the farm and caring for the cultural environment (5 days with accommodation) and
- A retreat aimed at personal change or development (2-3 days with full board).

- Germans are willing to pay more for Finnish transformative tourism products than Finns

	Finnish					German				
	N	Market price	WTP €, average	WTP €, med.	Difference for market price %	N	Market price	WTP €, average	WTP €, med.	Difference for market price %
Guided roof walk	304	30 €	28 €	20 €	-8 %	326	30 €	71 €	40 €	137 %
Cooking course	373	60 €	45 €	40 €	-25 %	384	60 €	80 €	62,50 €	34 %
Forest bathing	314	50 €	36 €	30 €	-29 %	368	50 €	62 €	50 €	24 %
Husky-safari	363	160 €	80 €	70 €	-50 %	431	160 €	144 €	150 €	-10 %
Shepherd holidays	248	500 €	297 €	300 €	-41 %	284	500 €	434 €	450 €	-13 %
Retreat (own development)	299	400 €	241 €	220 €	-40 %	277	400 €	383 €	390 €	-4 %





Willingness to Pay for transformative tourism products – price premium group

- Among the Germans, the size of the segment of those willing to pay the price premium was considerably larger than that of the Finnish segment.
- 64% of German respondents and only 23% of Finns were willing to pay a price premium for at least one product
- For products with lower market prices, the willingness to pay was higher as a percentage than for more expensive products.

	Finnish				German			
	Willing to pay the price premium N (% of all Finnish respondents)	Market price, €	WTP €, average	WTP €, med.	Willing to pay the price premium N (% of all German respondents)	Market price, €	WTP €, average	WTP €, med.
Guided roof walk	66 (12 %)	30 €	59 €	43 €	188 (38 %)	30 €	108 €	70 €
Cooking course	60 (11 %)	60 €	95 €	80 €	192 (38 %)	60 €	117 €	90 €
Forest bathing	43 (8 %)	50 €	88 €	60 €	159 (32 %)	50 €	103 €	85 €
Husky-safari	23 (4 %)	160 €	214 €	190 €	179 (36 %)	160 €	203 €	195 €
Shepherd holidays	26 (5 %)	500 €	609 €	560 €	95 (19 %)	500 €	619 €	600 €
Retreat (own development)	26 (5 %)	400 €	530 €	500 €	118 (24 %)	400 €	519 €	485 €





Guided roof walk (N=66)

Women 49%, men 51%

Highly educated (50%), upper secondary education 44%

Couples (no children/children living at home) (36%) or single people (31%)

Majority **employed** (58%), pensioners 23%

The majority rated their own household's income level as **middle-income** level (71%)

Age distribution: evenly distributed, all ages, **average age 44 years**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Breaking away from everyday life** (6,08)
2. Enjoying Nature (5,89)
3. Relaxation (5,86)
4. Gaining new experiences (5,83)
5. Quality time with family (5,68) women

Cooking course (N=60)

Women 51%, men 49%

Highly educated people (57%) with the main level of education, 40% with upper secondary education.

Couples (no children/children living at home) (40%) or single people (30%).

The majority **employed** (48%) or retired (38%).

Most people rated their household's income level as **middle-income** level (65%)

Mainly over 65 years (35%) or 25-34 years (22%), **average age 52**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Enjoying Local Food** (6,07)
2. **Gaining new experiences** (6,07)
3. **Breaking away from everyday life** (6,05)
4. Getting New Perspectives on Life (5,85)
5. The Widening of the Worldview (5,82)

Forest bathing (N=43)

Women 65%, men 30%

Highly educated (54%), upper secondary education 40%

The majority are childless or live without children, either alone (37%) or in a relationship (28%). 26% living with family.

Majority **employed** (70%), 19% retired.

The majority estimated their household's income level to be **middle-income** level (51%), low incomes level (30%).

There are interest in all age groups, 25-34 years (21%) and 55-64 years (21%) slightly more interested than other age groups, **average age 47**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Breaking away from everyday life** (6,16)
2. **Enjoying Nature** (6,09)
3. **Relaxation** (6,09)
4. Gaining new experiences (6,09)
5. Getting New Perspectives on Life (6,02)

Husky-safari (N=23)

Women 52%, men 48%

Highly educated (61%) with a primary level of education, 35% with upper secondary education

Couples (children living at home) (35%) or single people (35%)

Majority **employed** (61%), retired 21%.

The majority estimated their household's income level to be **middle-income** level (65%), while those on low incomes were 22%.

There are interested in all age groups, 25-34 years (22%) and more than 65 years (26%) slightly more interested than other age groups, **average age 45**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Breaking away from everyday life** (6,26)
2. **Improving well-being** (6,26)
3. Enjoying Nature (6,09)
4. Relaxation (6,00)
5. Gaining new experiences (6,00)

Shepherd holidays (N=26)

Women 46%, men 54%

Highly educated (54%), those with upper secondary education 42%

Single people (42%) or in a relationship (children living at home) (31%)

Majority **employed** (58%), retired 19%, self-employed 15%.

The majority estimated their household's income level to be **middle-income** (58%), low income level 31%.

There are interest in all age groups, slightly more interested in 35-44 years age group (27%) than others, **average age 46**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Breaking away from everyday life** (6,15)
2. **Enjoying Nature** (6,04)
3. Gaining new experiences (5,88)
4. Improving well-being (5,85)
5. Nature Connection (5,73) / Taking Time for Yourself (5,73)

Retreat (N=26)

Women 54%, men 46%

Highly educated people (62%), 31% with upper secondary education.

Single (39%) or in a relationship (children living at home) (35%).

Majority **employed** (69%), 19% retired.

The majority estimated their household's income level to be **middle-income** level (62%), 19% with low income level.

There are interest in all age groups, slightly more interest in 45-54 years age group (23%) than other age groups, **average age 45 years**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. **Relaxation** (6,12)
2. **Improving well-being** (6,00)
3. Enjoying Nature (5,92)
4. Breaking away from everyday life (5,92)
5. Gaining new experiences (5,85)



Guided roof walk (N=188)

Women 47%, men 53%

Highly educated (40%) or upper secondary education 35%.

Couples (no children/children living at home) (33%), families (35%) or single people (28%).

The majority **employed** (71%), pensioners 11%, entrepreneurs 10%.

Majority estimated their household's income to be **middle-income** level (73%).

Majority 25-54-year-olds (66%), **average age 46**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,42)

2. Breaking away from everyday life (6,39)

3. Experiencing new destinations (6,23)

4. Experiencing memorable experiences (6,21)

5. Outdoor Activities (6,11)

Cooking course (N=192)

Women 56%, men 44%

Highly educated (44%) or 36% with upper secondary education.

Couples (no children/children living at home) (37%), people living with families (33%) or single people (28%).

The majority in paid employment (64%) or retired (18%).

Majority estimated their household's income to be **middle-income** level (76%).

There are interest in all age groups, 45-54 years (22%) and 25-44 years (39%) slightly more interested than other age groups, **average age 46**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,45)

2. Breaking away from everyday life (6,44)

3. Experiencing memorable experiences (6,22)

4. Experiencing new destinations (6,21)

5. Relaxation (6,18)

Forest bathing (N=159)

Women 52%, men 48%

Highly educated (43%) or upper secondary education 38%.

Couples (no children/children living at home, 31% or having children living at home, 37%). Singles 27%.

The majority **employed** employment (69%), entrepreneurs 13%.

Majority estimated their household's income to be **middle-income** level (71%).

Most interested in age groups 25-54 years (in total 69%), **average age 44**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,43)

2. Breaking away from everyday life (6,41)

3. Relaxation (6,26)

4. Outdoor Activities (6,23)

5. Experiencing memorable experiences (6,23)

Husky-safari (N=179)

Women 53%, men 47%

Highly educated, 40% or upper secondary, 35%.

Couples (no children/children living at home) (33%), people living with families (36%) or single people (29%).

Majority **employed** (69%), retired 16%.

Majority estimated their household's income to be **middle-income** level (73%).

Interest evenly in all age groups, 45-54 years. 27%) slightly more interested than other age groups, **average age 47**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,51)

2. Breaking away from everyday life (6,49)

3. Experiencing new destinations (6,30)

4. Experiencing memorable experiences (6,25)

5. Relaxation (6,24)

Shepherd holiday (N=95)

Equally women and men.

Highly educated (45%) or upper secondary education 36%.

Couples (no children/children living at home) (33%), people with families (33%) or single people (32%).

The majority **employed** (72%), entrepreneurs 12%.

Majority estimated their household's income to be **middle-income** level (68%).

Interest evenly in all age groups, 45-54 years. 32%) slightly more interested than other age groups, **average age 43**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,57)

2. Breaking away from everyday life (6,38)

3. Experiencing new destinations (6,37)

4. Experiencing memorable experiences (6,31)

5. Nature Connection (6,28)

Retreat (N=118)

Women 49%, men 51%

Highly educated (48%), 36% with upper secondary education.

Couples (no children/children living at home) (32%), people with families (36%) or single people (29%).

The majority employed (74%).

Majority estimated their household's income to be **middle-income** level (71%).

Most interest in age groups 45-54 years (72%), **average age 44**.

TOP 5 travel motivations (average on a scale of 1=not at all important, 7=very important):

1. Enjoying Nature (6,49)

2. Breaking away from everyday life (6,43)

3. Outdoor Activities (6,31)

4. Relaxation (6,31)

5. Experiencing memorable experiences (6,28) / Slowing down (6,28)



Conclusions

- The most interesting transformative tourism products for both Finns and Germans are related to local culture, history and lifestyle or nature connection input into these product types.
- Finnish transformative tourism products have demand potential, especially in the international market, in the case of this study in the German market.
- For the Germans, Finnish transformative tourism products represent novelty and uniqueness, and these can both be highlighted as potential contributors to transformation and increase interest and willingness to pay for transformative tourism products.
- However, domestic tourists as a potential target group should not be completely forgotten. Although the proportion of domestic consumers that are willing to pay the price premium is small, this group may nevertheless be equal to or larger in terms of quantity than the German equivalent.





Thank You!

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<https://www.slu.se/en/departments/forest-ecology-management/forskning/nordic-nature-health-hub/regenerative-nature-tourism/>

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