Market research on the purchasing behaviourof international customers in Kittilä

Euroopan unionin osarahoittama

LAPIN LIITTO

KITTILÄ
PUHDASTA KULTAA

Levi

Research objective and target groups

The objective of the study was to identify the factors that motivate orpreventinternational travelers from visiting Levi during the snow-free season, and to encourage current winter-season customers to return during the summer and autumn. The results help identify actions and business opportunities for companies in the area, and provide information to support product development, marketing, and accessibility development.

The study was carried out using two complementary datasets. The main dataset was collected through a quantitative questionnaire-based interview in December 2025 and February 2026, primarily at Kittilä Airport among travelers leaving the area. In addition, the same questionnaire was distributed in the lobbies of Levi hotels via QR codes, and a small number of interviews were conducted at the Levi Center. In addition, ten qualitative, informal interviews were conducted in the Levi area in February 2026.

The target group of the study consisted of travelers from the United Kingdom, German-speaking Europe (Germany, Austria, Switzerland), and the Benelux countries (Belgium, the Netherlands, Luxembourg). A total of 332 questionnaire interviews were conducted, of which 303 respondents were part of the target group. The target was 250-300 respondents from the target group, so it was achieved. Fewer responses than expected were received via the QR code, 47 in total, and that channel also reached many Finnish respondents, who were not included in the analysis.

Theresults are analyzed in four country groups: the United Kingdom, German-speaking Europe, the Benelux countries, and other countries(excludingFinland). The “Other countries” group should be interpreted as an indicative comparison group rather than a unified market.

Numberof questionnaireinterviewrespondents

United Kingdom	112
Belgium	63
Netherlands	29
Luxembourg	1
Germany	71
Austria	7
Switzerland	20
Other	74

(Spain 18, Italy14, Poland6, Australia 4, Brazil 3, China 2, Denmark2, Greece2, Hong Kong 2, Hungary2, USA 3, Romania 2, Serbia 2, Albania 1, Bosnia 1, Bulgaria 1, Indonesia 1, Iran 1, Ireland1, Israel 1, Kuwait 1, Latvia 1, Portugal 1, South Africa 1, Ukraine1)

Numberof qualitativeinterviews

United Kingdom	2
Belgium	2
Netherlands	1
Luxembourg	1
Germany	2
Switzerland	1
Austria	1

The market potential and basic image of snow-free Levi

This sectionexamines howattractiveLeviappearsduringthesnow-free season, whichfactorslimitwillingnesstotravel,andwhatkindsofimagesareassociated with the destination in summer.

Summary

The study combines two complementary datasets: questionnaire interviews conducted at Kittilä Airport and 10 informal interviews conducted in Levi center. The questionnaire data show the types of interests, purchasing behaviors, and market differences among international travelers. The informal interviews, in turn, reveal why interest emerges or fails to emerge.

The overall picture is clear: the greatest challenge for Levi's summer tourism is not a lack of interest in nature, activities or Arctic experiences, but the fact that Levi is still perceived primarily as a winter destination. Summer Levi does not yet automatically emerge as a viable option for consideration, although its content is perceived as interesting when explained concretely.

Based on the datasets, there is real summer potential for Levi, particularly in German-speaking Europe and the Benelux market. However, interest becomes consideration only when Summer Levi appears as a product in its own right: a package combining the midnight sun, arctic fell nature, outdoor activities, relaxation, and a functioning service infrastructure.

Accessibility is at the heart of development. Demand for the summer product may fail to materialize if flight connections, packaging, or the travel chain are not in order.

The key conclusion is that the barriers to growth are largely solvable. Mosquitoes, sleeping in the light, the need for a car, accessibility, and uncertainty about what to do in Levi without snow are practical questions that can be addressed through productization, the service promise, and marketing communications. For the growth of Summer Levi, the decisive issue is not creating new demand from scratch but turning existing interest into a purchasable, easily understandable product.

Markets have different roles in Levi's growth during the snow-free season

Market roles in summer growth

1. German-speaking Europe - Lead market

- Lead market for self-guided outdoor growth
- Has the most positive attitude towards tourism during the snow-free season
- Emphasizes nature, routes, hiking, and independence
- Potential is created especially through easily accessible outdoor content

2. Benelux -Growthmarket

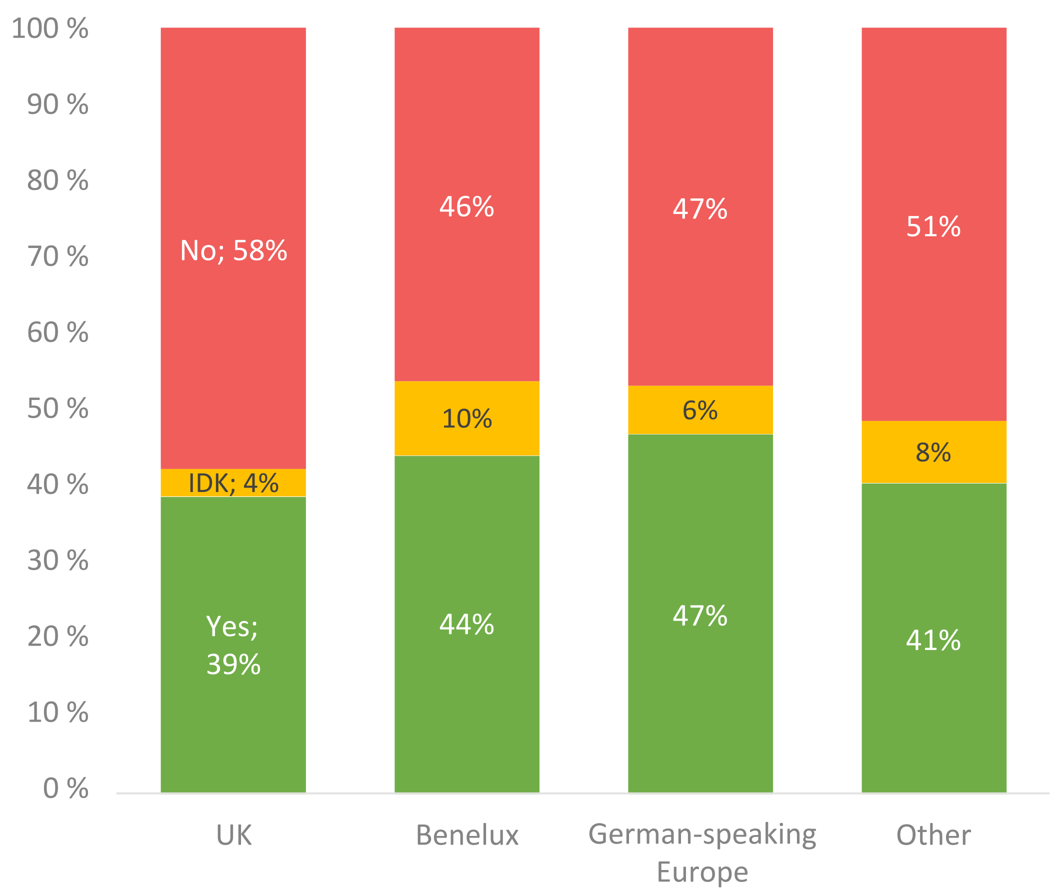
A promising growth market that needs concretization

- There is interest, but uncertainty is greater than in German-speaking Europe
- The purchase decision is strengthened when it is made visible what can be done in Levi, what is open, and how the trip works in practice
- Suitable for a content-rich, easily understandable summer product

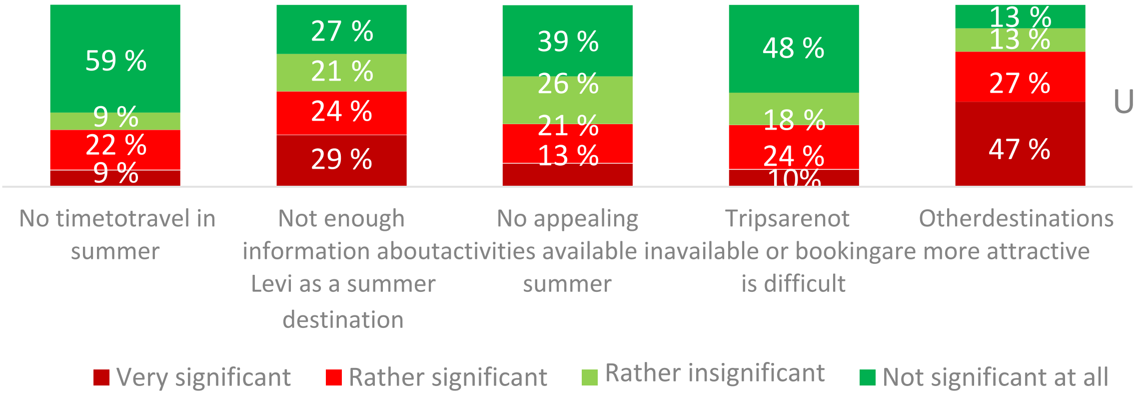
3. United Kingdom-Developmentmarket

- Development market for packaged and family-friendly products
- Has the most cautious attitude towards Summer Levi
- However, it is not a weak market, but a market that needs to be developed in a different way
- The winter-season customer base, the role of package holidays, and the need for ease make it a potential market for ready-made summer products

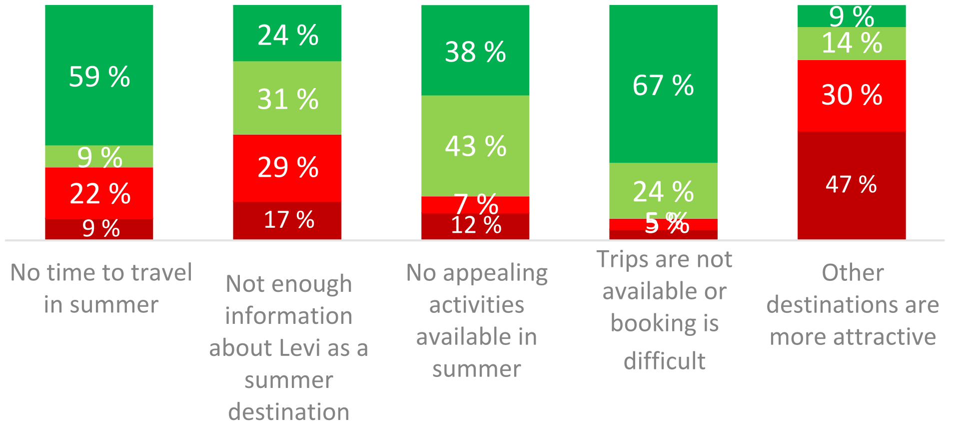
German-speaking Europe and Benelux are the most natural growth markets for Summer Levi, but the UK is an important development market for ready-made, easily purchasable summer products.



Why people do not travel to Levi



UK



Benelux

The largest barrier is not a single deficiency but the perception that other summer destinations are more attractive. The awareness challenge is especially emphasized in the United Kingdom, while in German-speaking Europe, some deficiencies are also seen in the range of activities.
Responses to the open-ended question show that the biggest challenge for Levi's summer tourism is not merely competition with other destinations, but a deeply rooted image of Levi as a winter destination. Many respondents strongly associate Levi with snow, Christmas, and winter, which reduces their interest in visiting the destination in summer.
Note that the price appears in only a few responses. Price does not prevent initial interest, but it may become a barrier to the purchase decision when the trip becomes more concrete.

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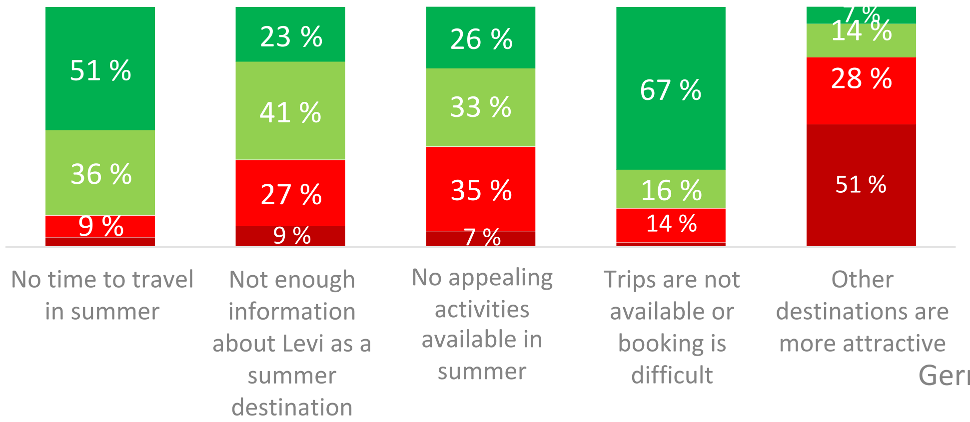
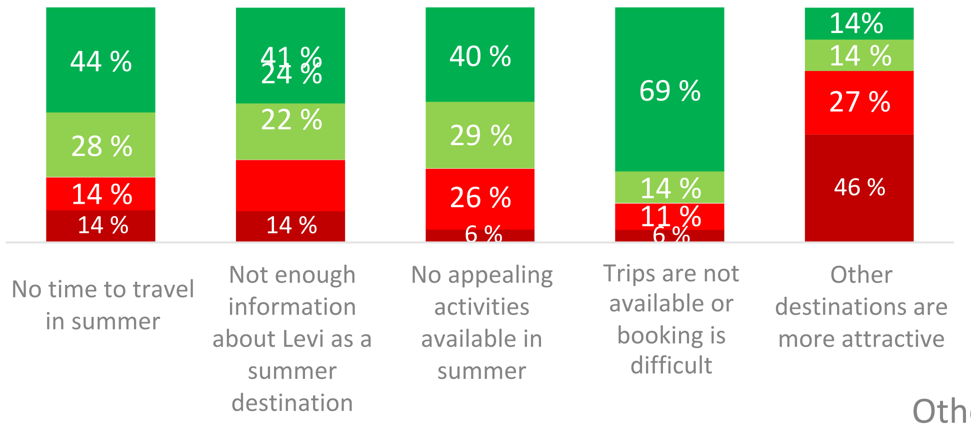
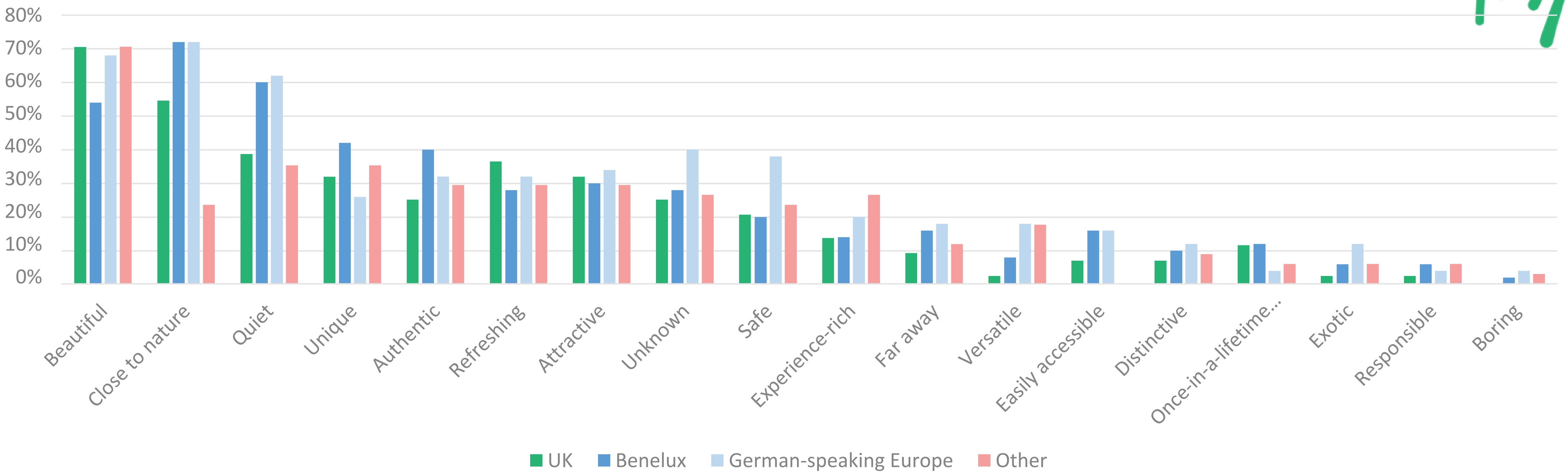


German-speaking Europe



Other countries

What kind of image Levi has during the snow-free season



Levi’s image during the snow-free season is strongly nature-oriented: the destination is perceived as beautiful, close to nature andfairlypeaceful. Atthe sametime, formany peopleLevi stillappearspartly unknownanddistant, andversatility oreasy accessibility do not stand out strongly. The task of summer communications is to shift the image from scenery into a concrete holiday option.

Summer Levi's content, activities and purchase path

Thissectionexamineswhattravellerswanttodoin Levi,whichactivities interest themmost,andthroughwhichchannelsinspirationandservicesduringthetripare formed.

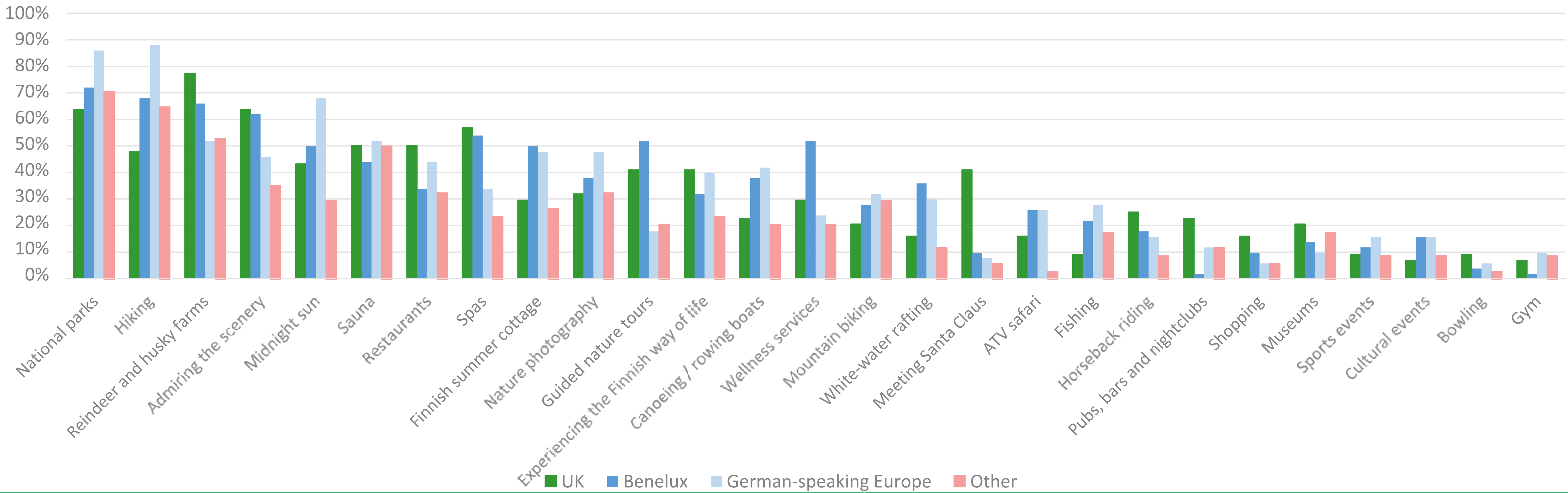
What people want to do or experience in Levi during the snow-free season

	UK	Benelux	German-speaking Europe	Other	Total
Nature experiences	86 %	90 %	90 %	88 %	89 %
Outdoor sports or physical activities	68 %	82 %	76 %	56 %	72 %
Wellbeing and relaxation	57 %	64 %	58 %	47 %	57 %
Cultural experiences	61 %	38 %	30 %	41 %	42 %
Touring trip	27 %	28 %	46 %	29 %	33 %
Participating in a cultural or sports event	18 %	14 %	16 %	9 %	15 %
Shopping	18 %	4 %	6 %	6 %	8 %

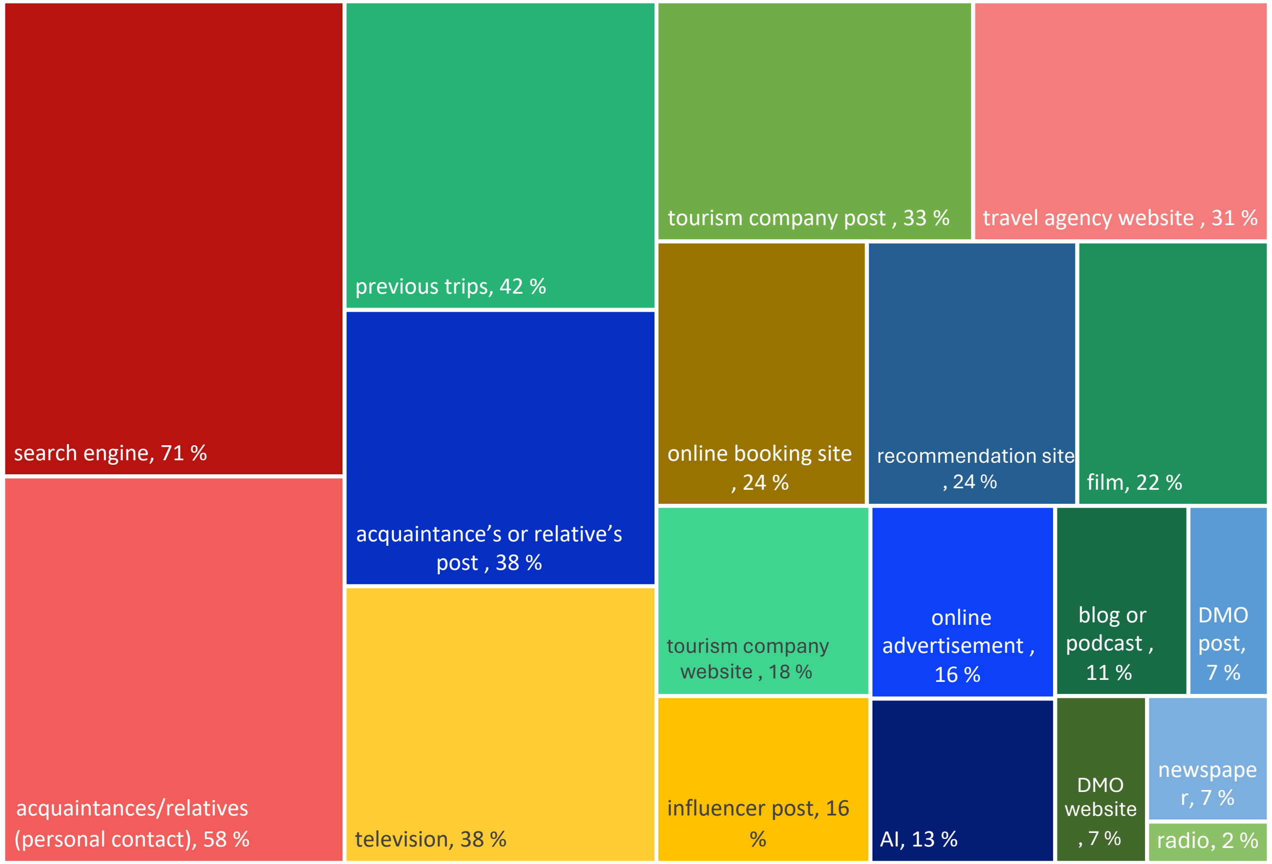
Nature experiences are by far the most important reason to travel to Levi in summer across all markets. Alongside them, outdoor and sports activities, as well as wellbeing and relaxation, are emphasized, while shopping and events are clearly smaller drivers. Levi should be positioned above all as a destination for nature, activity, and well-being.

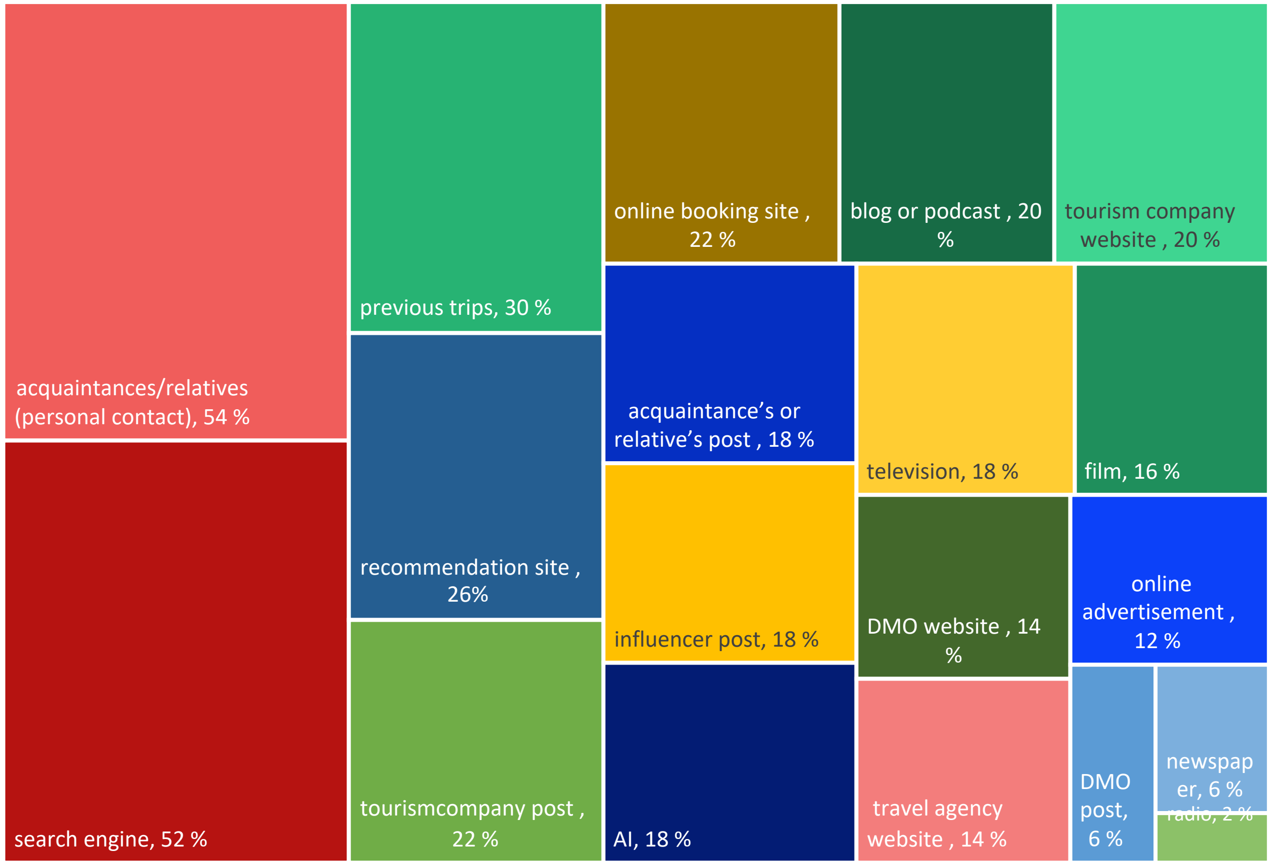
Which activities are of most interest

Among individual activities, the greatest interest is in national parks, hiking, reindeer and husky farms, admiring the scenery, the midnight sun, and sauna. Demand is focused on soft activities and easily accessible nature experiences, rather than nightlife or shopping. Clear, easily purchasable outdoor products should be placed at the core of product development.



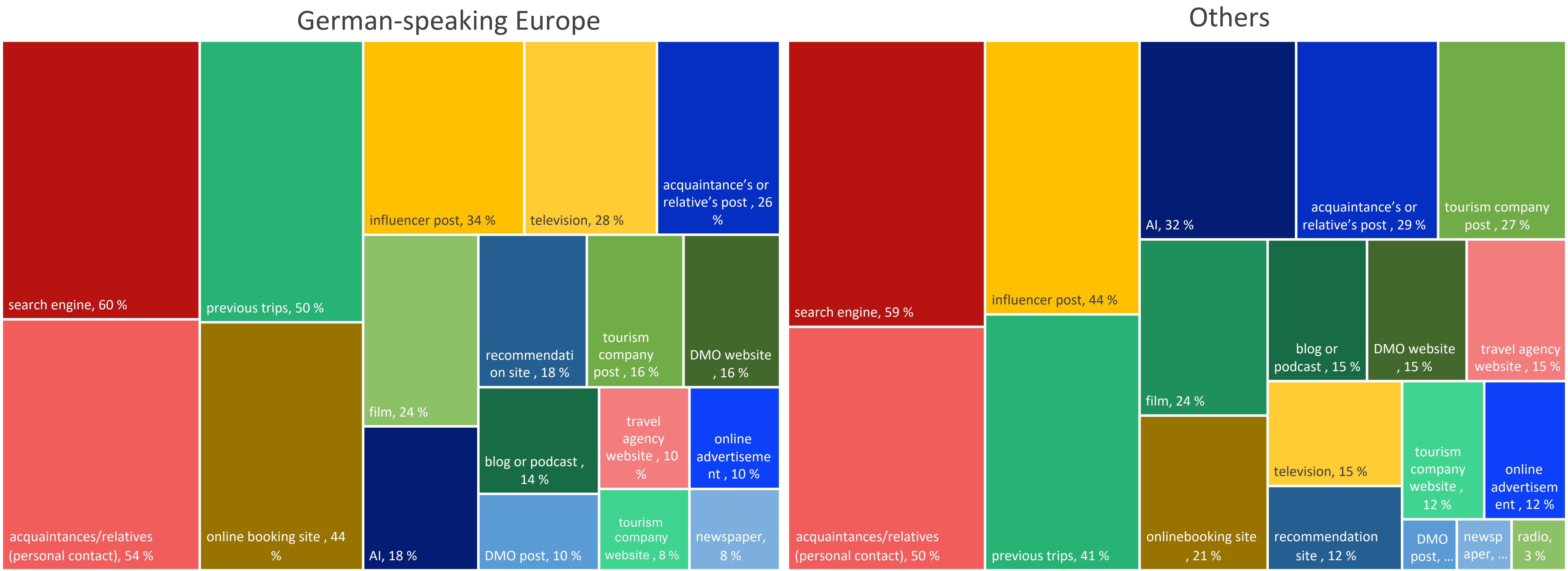
Where travel inspiration comes from





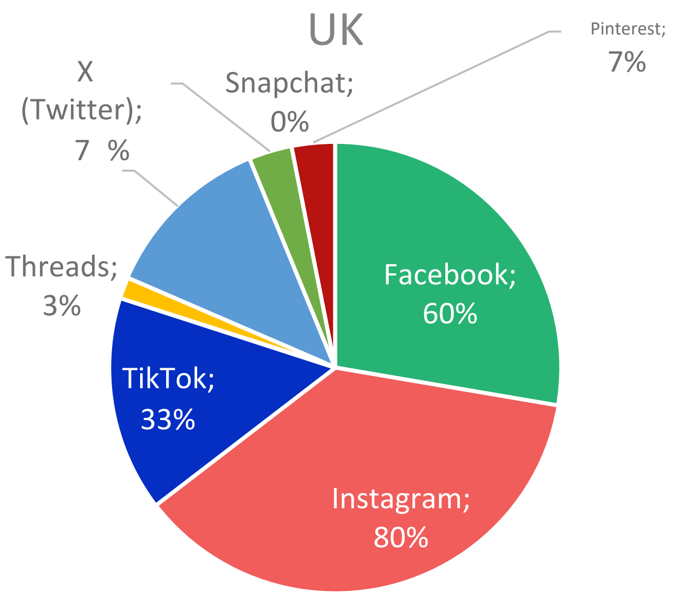
In the United Kingdom, inspiration comes above all from search engines, close contacts, and previous trips. In the Benelux countries, the path is more multi-channel: in addition to search engines and acquaintances, the decision is supported by blogs, influencers, recommendation sites, and tourism company websites. In both groups, earned visibility and search discoverability are clearly more important than the DMO’s own channels.

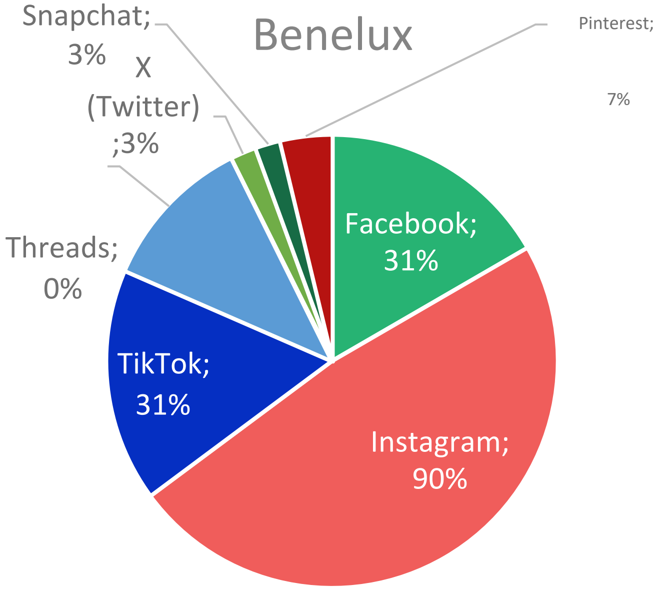
Where travel inspiration comes from

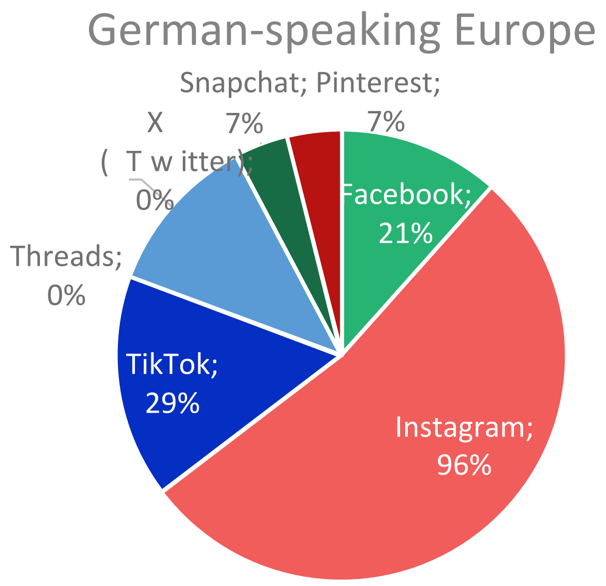


In German-speaking Europe, search engines, previous trips and online booking sites stand out, indicating strong self-guided information search. In other countries, influencers and artificial intelligence are clearly more prominent. This supports a visibility model that combines strong search visibility, commercial booking sites and easily shareable social content.

Which social media channels have provided inspiration



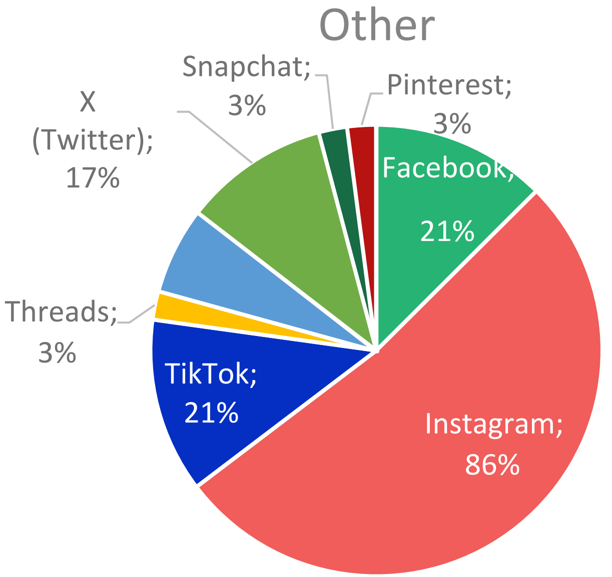




Instagram is clearly the most important source of inspiration across all markets. The United Kingdom differs from the others in that Facebook still retains a strong role there[1], whereas in other markets its significance is smaller. Facebook has more users in the United Kingdom than in Germany, for example. TikTok serves as a supporting channel, but the core of social media investments should be built around Instagram and complemented, market-specifically, by Facebook in the United Kingdom.

There are also differences between age groups in social media channels. People of all ages are inspired on Instagram, but those who prefer Facebook are mainly 35 years old or older. Those who use TikTok are most commonly under 35. As many as 57% of 18-24-year-olds have received travel inspiration from TikTok.

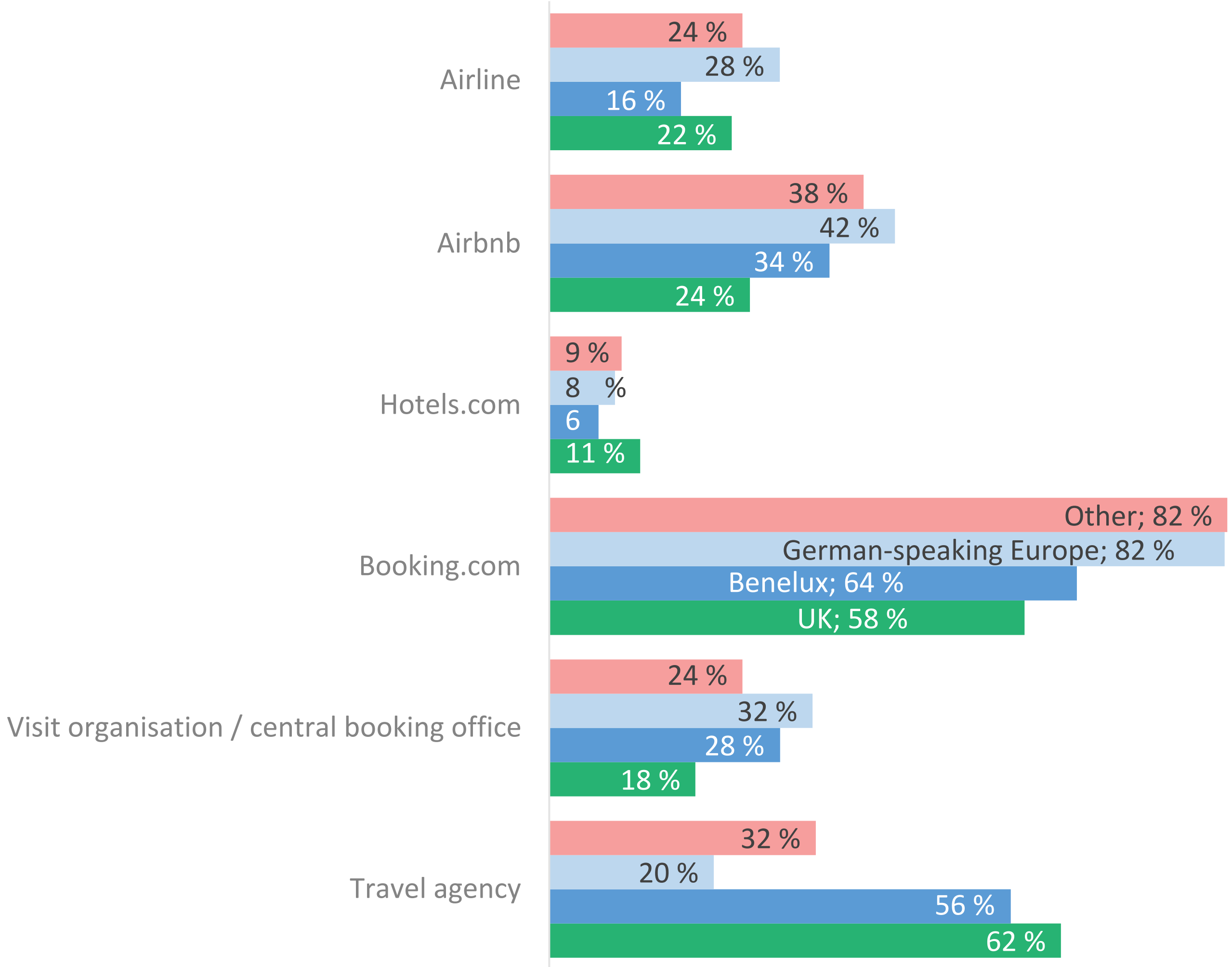
[1] https://datareportal.com/reports/digital-2025-united-kingdom



Which digital channels are used to book the trip

There are clear market differences in the services used to book trips:in theUnited Kingdom and the Benelux countries, travel agencies remain strong, whereas in German-speaking Europe and other countries, Booking.com and Airbnb are more prominent.

Levi’s visibility must be in order across both traditional distribution and global booking sites.



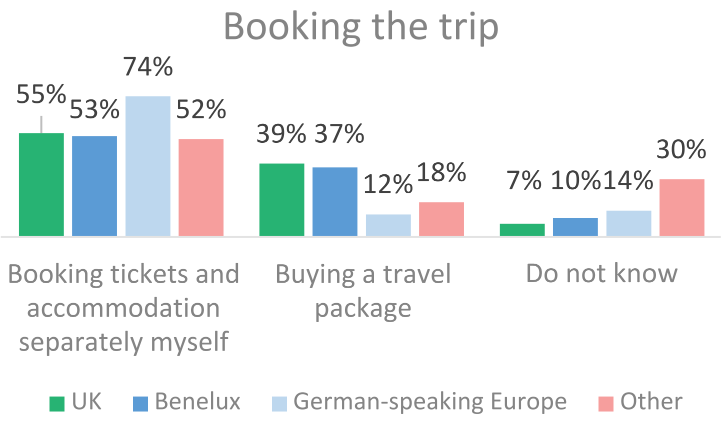
Trip realization and the role of the destination as part of the trip

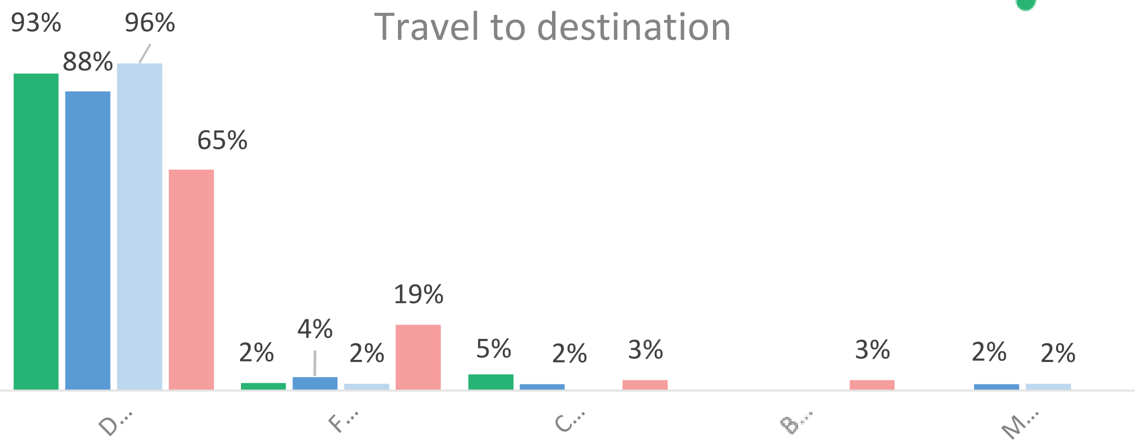
This sectionexamineshow peoplewanttobookandcarryoutthetrip,howmuch guidance is needed, and whether Levi is seen as an independent destination or as part of a broader Lapland experience.

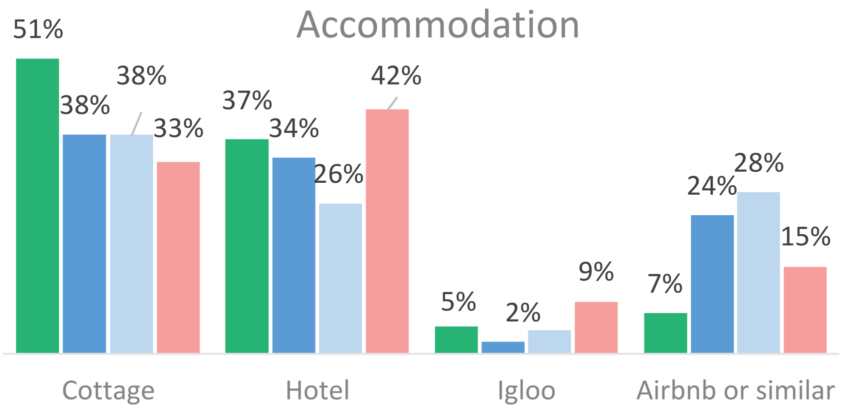
How the trip is booked, carried out and accommodated

Most travelers plan their trips themselves, but there is still demand for ready-made packages, especially in the United Kingdom and the Benelux countries. Travelers want to arrive at their destination on a direct flight, making accessibility a critical part of the summer product.

In accommodation, cottages and four-star hotels are emphasized, and in the United Kingdom, there is also a stronger demand for five-star accommodation than in the other markets.





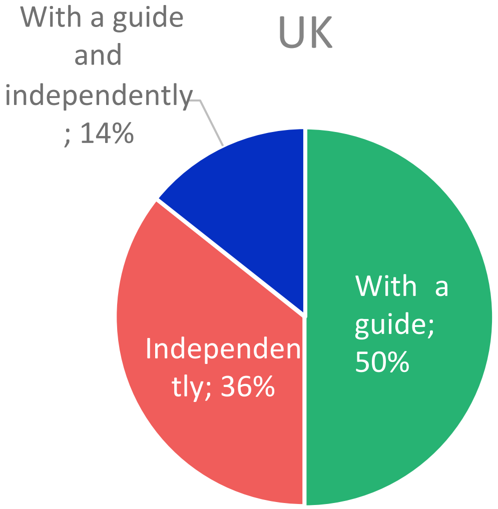


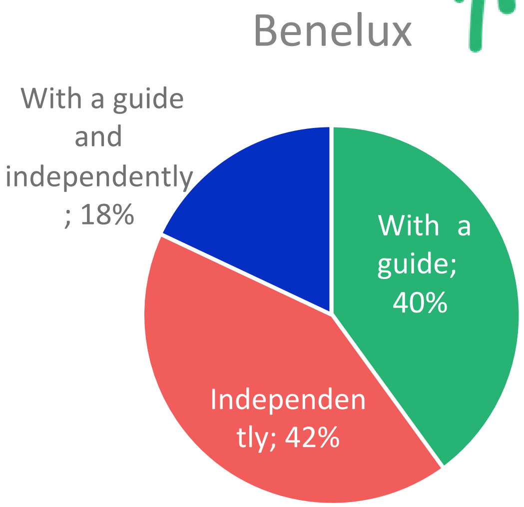
	Hotel star rating			
	UK	Benelux	German-speaking Europe	Other
***	6 %	12 %	23 %	23 %
****	56 %	77 %	62 %	46 %
*****	38 %	12 %	15 %	31 %

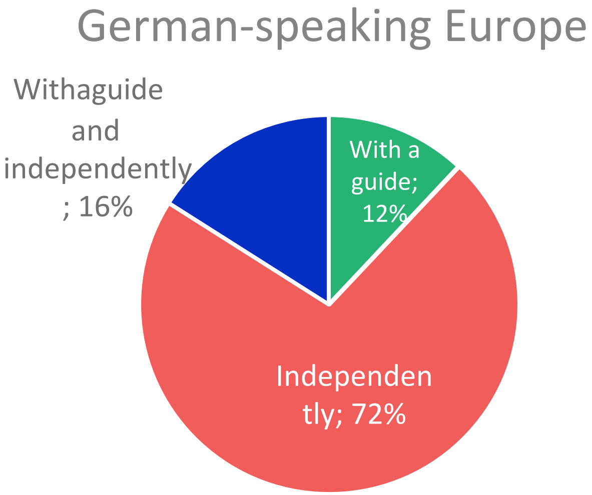
Needfor guidance

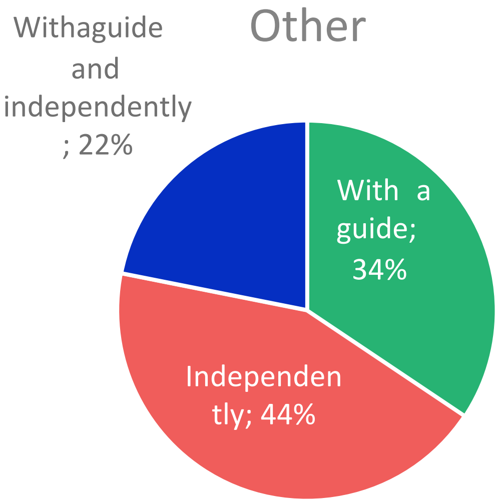
The need for guidance varies clearly by market. In theUnited Kingdom and the Benelux countries, a guided or partly guided experience lowers the purchase threshold, while in German-speaking Europe, strong independenceisemphasized. The same content should therefore be productized both

asaguided versionandas awell-instructed self-guided version.

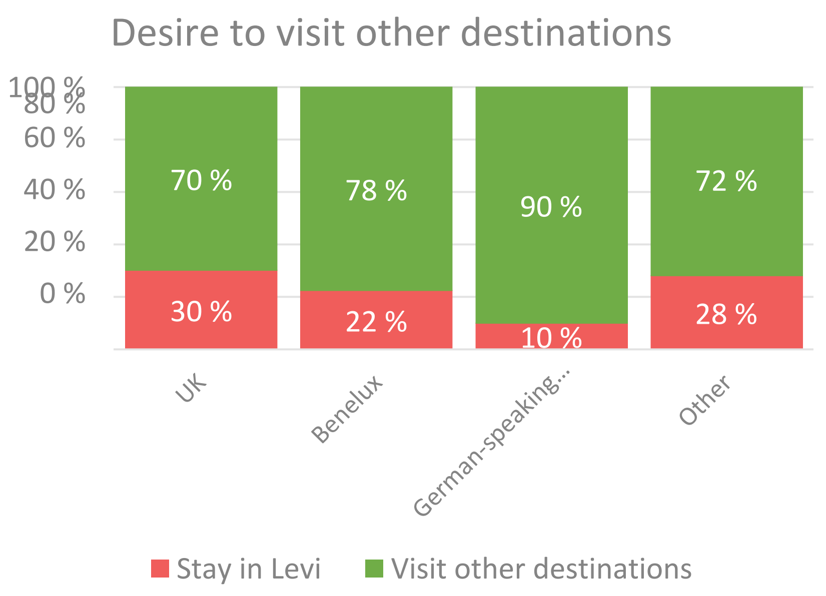


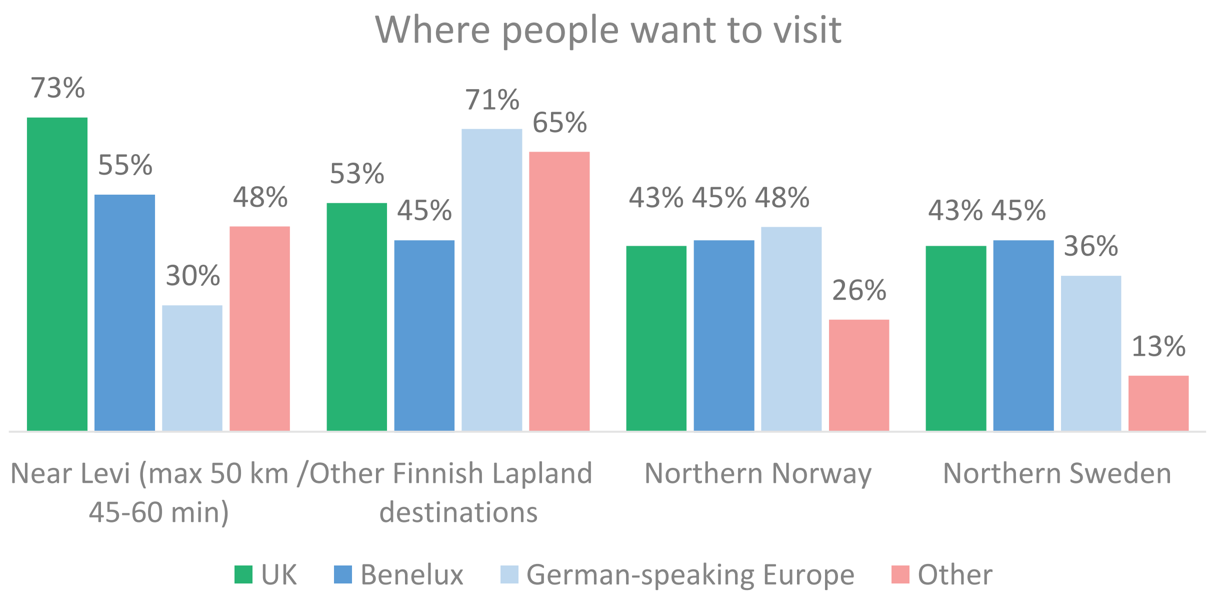






Desire to combine Levi with other destinations





Levi is not seen only as a single point, but as part of a broader Lapland experience. The majority would be willing to visit other destinations as well, especially in German-speaking Europe, where the desire to combine different places is strongest. Development should emphasize easily purchasable day trips, nearby destinations, and route-like packages.

What associations are linked to the Levi brand

	UK	Benelux	German-speaking Europe	Other
Lapland	88 %	92 %	96 %	76 %
Arctic	79 %	70 %	84 %	55 %
Authentic	49 %	48 %	35 %	30 %
Hospitable	28 %	38 %	43 %	24 %
Midnight sun	33 %	30 %	41 %	15 %
Arctic summer	23 %	14 %	22 %	12 %
Distinctive	9 %	10 %	16 %	24 %
Year-round	21 %	10 %	4 %	9 %
Historical	7 %	8 %	10 %	12 %
Communal	14%	10%	4 %	9 %

Levi's current image is built strongly around Lapland and Arcticness. By contrast, Arctic summer, year-roundness, and community remain weak associations, even though it would be natural to build the summer brand on them. Summer communications should use the existing Arctic equity and build a summer meaning on top of it.

Target groups, segments, and market-specific differences

Thissectionexamineswhatkindsof travelersegmentsareidentifiedin the data, how the segments differ in terms of interests, inspiration channels and demographics, and what this means for targeting.

Traveler segments

Travelersweredivided into threesegmentsbased on their general travel preferences when choosing foreign destinations. The analysis was conducted using latent class analysis.

The segmentation shows that there is no point in selling one Summer Levi to everyone in the same way. The largest group is independent nature travelers, but alongside it, there is the basic holidaymaker seeking ease and the experience and activity traveler who expects a lot of content. In practice, this means three distinct service promises: self-guided experiences, an effortless holiday, and a versatile destination for activities.

Independentnaturetravelers(59 %)

Important:

- nature;
- memorable experiences
- activities
- good connections
- accommodation

Not of interest:

- responsibility/ecology
- social interaction
- culture

They seek nature and experiences, but in their own peace. They are not "value-based".

Basic holidaymakers (27 %)

Important:

- nature
- memorable experiences
- good connections
- family/partner

Not of interest:

- activities
- accommodation
- almost all "intensive" activities

They want an easy and pleasant holiday. They are not seeking intensive activities; a"basicallygoodholidaydestination"is enough.

Experience and activity travelers (14 %)

Important:

- memorable experiences
- nature
- activities
- good connections
- safety
- accommodation
- family/partner
- new people
- almost all "intensive" activities

They want everything. The destination must offer activities and be versatile. Expectations of the destination are high.

What different segments are interested in

Thereis a shared core across the segments: national parks, hiking,reindeerand huskyfarms, and the midnight sun. Differences arise in how much service and intensity are expected around these. For the basic holidaymaker, scenery, sauna, and restaurants are enough, whereas the active traveler expects canoeing, cycling, safaris, and other activities.

Interest level	Independent nature travellers	Basic holidaymakers	Experience and activity travellers
High interest across all segments	National parks, hiking, reindeer and husky farms	National parks, hiking, reindeer and husky farms	National parks, hiking, reindeer and husky farms
High interest	Midnight sun, admiring the scenery	Sauna	Admiring the scenery, restaurants, spas, sauna, midnight sun, Finnish summer cottage, Finnish lifestyle
Moderate interest	Sauna, nature photography	Admiring the scenery, Finnish summer cottage, spas, wellbeing services, restaurants, Finnish lifestyle	Canoeing / rowing boats, ATV safari, white-water rafting
Slight interest	Spas, guided nature excursions, Finnish summer cottage, canoeing / rowing boats	Guided excursions, nature photography	Wellbeing services, mountain biking, nature photography, pubs, bars and nightclubs, meeting Santa Claus

Where different segments get their inspiration

Inallsegments, themost important sources ofinspirationare searchengines,acquaintancesandrelatives, andprevious trips. Thedifferenceemergesincomplementarychannels:foractivitytravellers,bookingsites,socialmedia,advertisingandartificial intelligence have broader influence, while in other segments the range of channels is narrower. Instagram serves as a social media channel that connects all segments.

Inspiration sources	Independent nature travellers	Basic holidaymakers	Experience and activity travellers
Significant shared sources of inspiration	Search engine, acquaintances and relatives (personal contact), previous trips	Search engine, acquaintances and relatives (personal contact), previous trips	Search engine, acquaintances and relatives (personal contact), previous trips
Significant sources of inspiration (>40% of segment)	-	-	Online booking site, tourism company post, film
More occasional sources of inspiration (20-39% of segment)	Influencer post, television, acquaintance's or friend's post, online booking site, film	Acquaintance's or friend's post, tourism company post, television, influencer post, artificial intelligence, DMO website	Acquaintance's or relative's post, travel agency website, influencer post, online advertisement, recommendation site, artificial intelligence, tourism company website
Social media channels (>50% of segment in bold in original; otherwise >20%)	Instagram; TikTok; Facebook	Instagram; Facebook; WhatsApp	Instagram; Facebook; TikTok; WhatsApp

Demographic profile of the segments

The segments alsohaveacleardemographic profile. Independentnaturetravelers and activity travelers are concentrated among 25-44-year-olds, whereas basic holidaymakers are predominantly women and show a slightly more even age distribution. Demographics support targeting, but in practical terms, the most important point is that different segments can be offered different buying methods, content, and messages.

Profile factor	Independent nature travellers	Basic holidaymakers	Experience and activity travellers
Country group	United Kingdom (29%); Benelux countries (28%); German-speaking Europe (40%)	Benelux countries (31%); German-speaking Europe (35%)	UK (31%)
Gender	Women (50%); Men (50%)	Women (67%); Men (33%)	Women (56%); Men (44%)
Age group	25-44-year-olds (61%)	25-54-year-olds (76%)	25-44-year-olds (68%)
Occupational group	White-collar employees (31%); managers (19%)	White-collar employees (42%); managers (22%)	White-collar employees (40%); workers (16%); managers (16%)
Family type	Couple without children (36%); couple with children under 8 (25%); people living alone (18%)	Couple without children (48%); couple with children under 8 (22%)	Couple without children (60%); couple with children under 8 (32%)
Income	> EUR 50,000/year	EUR 30,001-70,000/year	> EUR 40,000/year

Interviews deepen understanding of Summer Levi

Inthissection,theinformalinterviewsrevealwhatkindsofimages, expectations and practical barriers influence how Levi is seen as a summer destination in different markets.

Informal interviews - Summary

Interviews

In addition to the questionnaire interviews, ten informal interviews were conducted in the Levi Center. The informal interviews answer the question of why interest does or does not emerge, and what fears, images, and practical thresholds lie in the background. In questions concerning activities, the process was that the interviewee was first asked what was of interest; if they did not understand the offering, it was explained.

Interest in Levi:

- Three interviewees were already clearly interested in Summer Levi
- Five would become interested if the product and practical matters were made easy and visible
- Two still consider Levi primarily a winter destination

Note: The informal interviews cannot be generalized statistically; their purpose is to interpret and concretize the findings from the questionnaire data

Ten informal interviews conducted at the Levi Center deepen the questionnaire results. Theinterviews showthat interest inSummer Levi does not emerge automatically, but only when the traveler understands that the destination is a product in its own right, not merely an off-season by-product.

In the interviews, the appeal of Summer Levi is built around four themes: the midnight sun, easily accessible fell nature, a combination of active things to do and relaxation, and a ready-made tourist center infrastructure. In other words, Levi is not interesting in summer as a wilderness-like “empty Lapland”, but as a destination where Arctic nature can be experienced easily without heavy planning.

At the same time, the interviews reveal that the purchase decision is slowed down by very concrete uncertainties. Recurring questions include mosquitoes, sleeping in light, the price level, local mobility, and the basic question of why one would travel to Lapland without snow. This means that the role of marketing is not only to inspire, but also to remove practical hesitation.

Example profiles identified from the interviews

UK: familyseekingease
Levi is of interest when the destination appears as a safe, compact, and easily purchasable Arctic summer holiday. The key barriers are price, the smoothness of the travel chain, and the midnight sun from the perspective of children.

UK: activecouple
Interest grows quickly when the midnight sun, hiking, cycling, and sauna are brought forward. The greatest uncertainty is whether Levi has enough content in summer without winter.

German-speaking Europe / Germany: self-guided outdoor traveler
Levi is seen as interesting if clear routes, cycling, hiking, and easily accessible nature are available. Barriers are primarily related to mosquitoes, weather variability, and practical arrangements.

Conclusions

In the United Kingdom, ease, safety, and family-friendliness are emphasized. Interest grows when Levi appears as a compact, easily accessible Arctic summer destination where transfers are short and there are activities for different age groups. Barriers include price, the smoothness of the travel chain, the midnight sun, and uncertainty about whether there is enough content in summer.

In German-speaking profiles, Levi appears above all as an accessible outdoor destination. Interest is built around routes, hiking, cycling, scenery, silence and the midnight sun. For these travelers, the greatest barriers are not related to the content itself but to practical questions: mosquitoes, weather variability, equipment, and the ease of using services on site.

Summer Levi should be positioned as an effortless Arctic holiday, whereas in German-speaking Europe, its strength is a self-guided outdoor experience. The same destination interests different markets for different reasons.

Benelux / Belgium: first-timefamily
Levi is of interest when it appears as a safe, ready-made, and easily manageable Lapland destination. Barriers include mosquitoes, lightness, and uncertainty about whether the destination feels sufficiently “Lapland-like”, also in summer.

Benelux / Netherlands: couple seeking light and atmosphere

Summer Lapland is seen as an exceptional experience of light, peace, and nature. The barriers are practical: weather, mosquitoes, and the need for guidance in one’s own language.

Benelux / Luxembourg: content-rich active family / slow travel couple

Levi is of interest because the same destination can offer a wide range of activities or, alternatively, a peaceful, high-quality nature holiday. Hesitation is mainly due to costs, distance, and the availability of services in the summer.

Conclusions

There is a particular attraction in the light, atmosphere, midnight sun, calm program, and the experiential quality of Arctic nature. In the Benelux profiles, content richness is emphasized: people want to combine many activities, family-friendliness, and ready-made services in the same destination. In these markets, barriers are, above all, related to uncertainty about what is open in summer, how easy mobility is, and how strongly the destination really feels like “Lapland” without winter.

In the Benelux market, Levi should be built as both an atmospheric Arctic light

experience and a practical, content-rich destination where a lot can be experienced without complicated travel planning.

Key findings from the informal interviews

The overall message of the interviews is clear. There is potential, but growth will not happen on its own. Summer Levi must be made visible as its own Arctic product, whose content, practicalities, and purchasing are easy to understand. When nature, content, accessibility, and concrete, practical advice are brought together in a single message, interest can be turned into consideration, and consideration into purchase.

1. **Summer Levi is not rejected; it is not yet recognized.**
   There is interest, but the destination does not automatically come to mind for most people as a summer option. Interest emerges only when the traveler sees concretely that Levi offers the midnight sun, fell nature, activities, water, sauna, and a ready-made service structure in the same package.
2. **Key barriers are practical, not principled.**
   Mosquitoes, sleeping in light, weather, accessibility, the need for a car, and price perceptions recur in the data more than rejection related to the content itself. This makes the barriers solvable through marketing and productization.
3. **The desired summer content is surprisingly consistent across markets.**
   Hiking, cycling, canoeing or SUP, sauna, reindeer and husky farms, easy nature experiences, and the midsummer midnight sun recur in several profiles. The shared core is therefore strong, even though the purchase method and service needsvarybymarket.
4. **Levi's summer position is an "easy Arctic resort", not a deep wilderness destination.**
   This is both a strength and a limitation. It makes Levi approachable for first-timers, families, and those who do not want to build their trip around difficult logistics. At the same time, for those seeking the most authentic or remote wilderness experience, Levi may appear too active or commercial**.**
5. **The datasets complement each other regarding price.**
   In the questionnaire data, price does not emerge as a key reason for not traveling to Levi in summer, suggesting that Levi does not lose at the first stage because of price but because of images and awareness. In the interviews, however, price emerges as a practical concern as the trip is evaluated more concretely. This supports the interpretation that the importance of price increases during the consideration and purchase decision stages, rather than serving as a barrier to initial interest.

visitory

Euroopan unionin osarahoittama

LAPIN LIITTO

KITTILÄ
PUHDASTA KULTAA

Levi