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Tourism Survey of South Savo 2025

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1. EXECUTIVE SUMMARY

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- **The South Savo Tourism Survey 2025 (271 respondents)** shows that tourism in the region relies strongly on domestic demand, particularly **visitors from Uusimaa** and from **within the region itself.**
- The respondent profile is skewed towards the **55+ age group**, who mostly travel with a partner or family and tend to visit the area **repeatedly**
- A **high rate of second-home ownership** further strengthens visitors' attachment to the region.
- The region's tourism appeal is based on **culture, nature, lake landscapes, and food experiences**. While **sustainable tourism is well recognised**, concrete participation often remains limited to **light everyday choices**.
- Arrival and mobility rely heavily on **private car use**, which limits opportunities for **car-free visitors**.
- **Satisfaction with services is very high**, and willingness to recommend the destination is strong (**NPS 51**).
- Development needs relate to **accessibility**, **restaurant opening hours**, **reaching younger target groups**, and **extending the tourism seasons**.
- Overall, the region is seen as having **significant potential to strengthen year-round and sustainable tourism**.

2. WHO ARE THE VISITORS TO SOUTH SAVO?*

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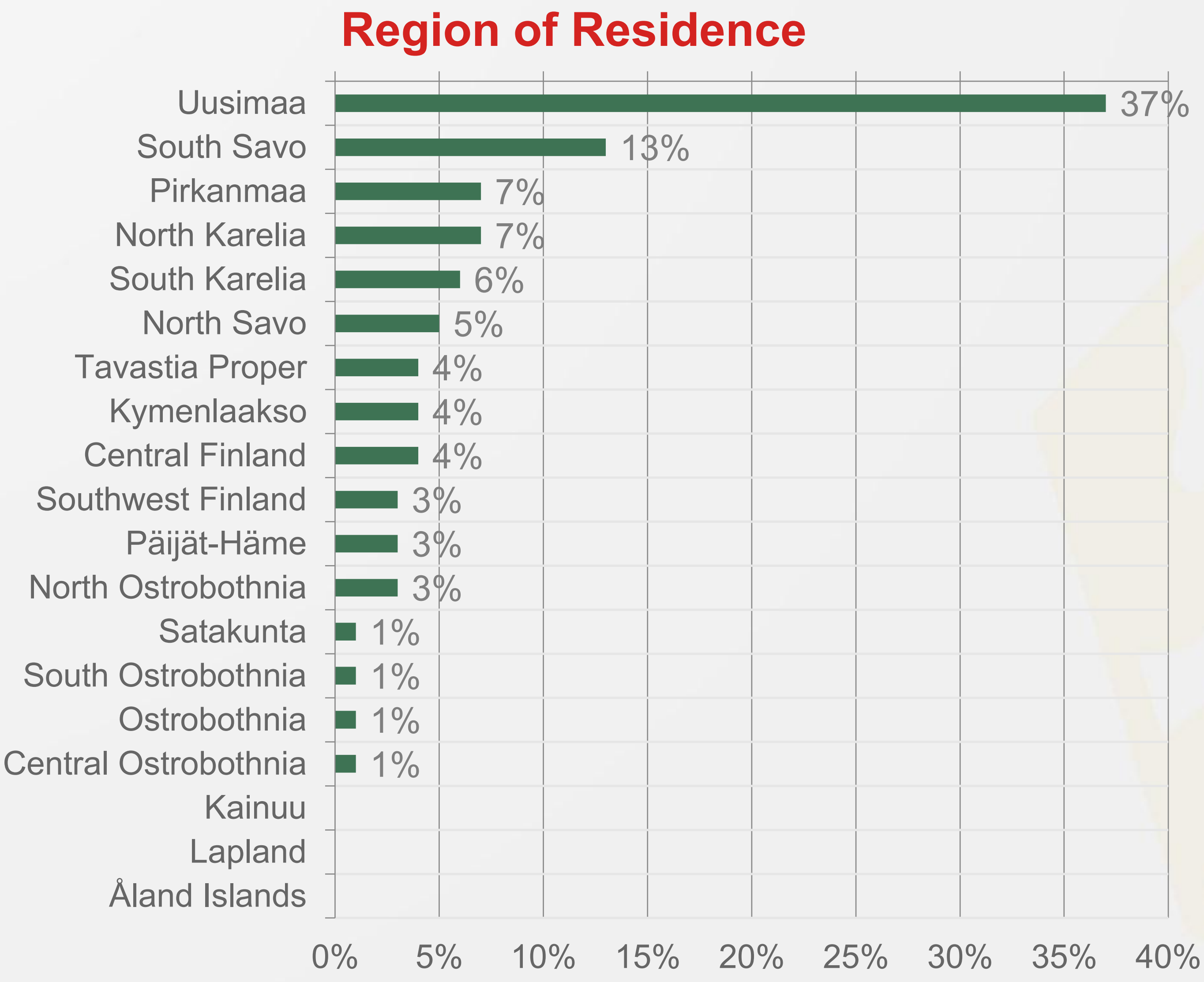
* The findings are based on responses from approximately 270 survey participants. While the results cannot be generalised to all visitors, they provide a useful insight into respondents' experiences, travel motivations, and service needs.

2. WHO ARE THE VISITORS TO SOUTH SAVO?



The largest share of visitors to South Savo live in the Uusimaa region (37%), highlighting the **importance of the Helsinki metropolitan area for tourism** in the region.

Residents of South Savo itself (13%) form the second-largest group, pointing to local mobility and nearby travel within the region.

Overall, South Savo mainly attracts residents from southern and eastern Finland, particularly from nearby and easily accessible areas. This pattern suggests a strong role for **short-distance domestic tourism and second-home use**.

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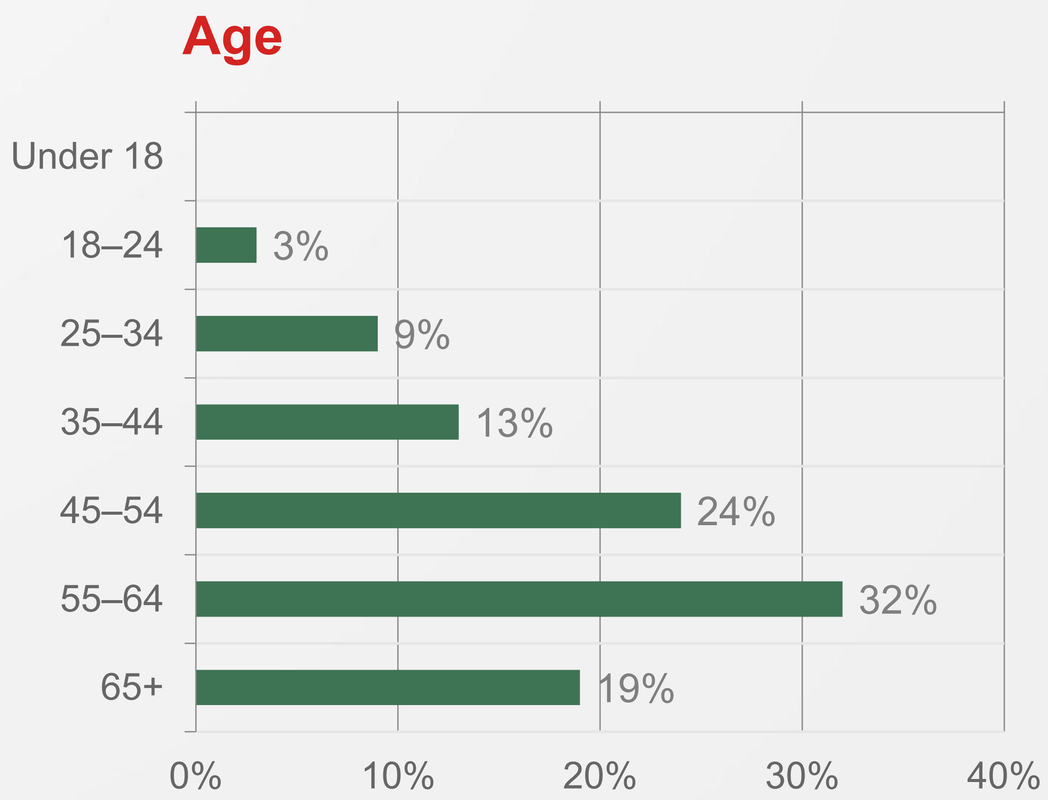
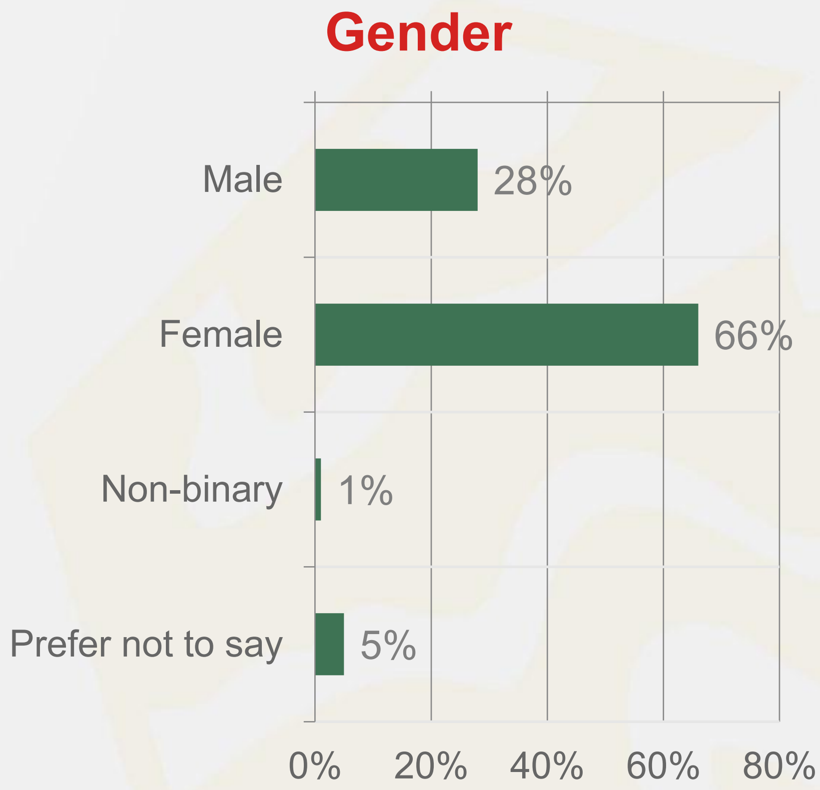
2. WHO ARE THE VISITORS TO SOUTH SAVO?





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Visitors to South Savo represent a wide range of age groups; however, based on the survey, the largest group (51%) consists of older visitors aged 55 and over, while the smallest group is younger visitors under the age of 35 (12%).

A clear majority of respondents (66%) were women, although it should be noted that most respondents were travelling with other companions.

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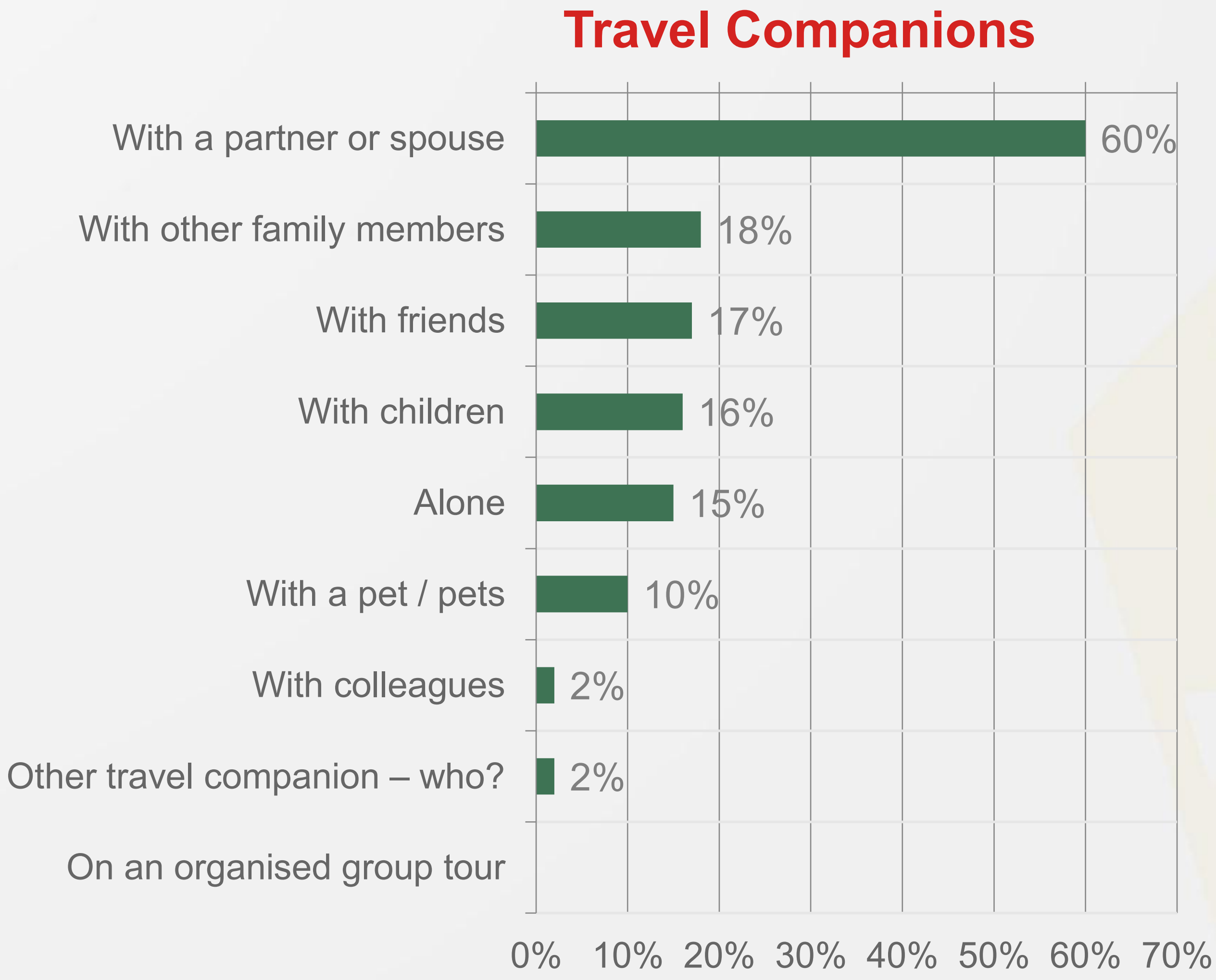
2. WHO ARE THE VISITORS TO SOUTH SAVO?



Visits to South Savo most commonly take place among adults.

The majority of visitors travel with a partner or spouse (60%). In addition, some visitors travel with other family members (18%), friends (17%), children (16%), and/or pets (10%).

A notable share of visitors also travel alone (15%).

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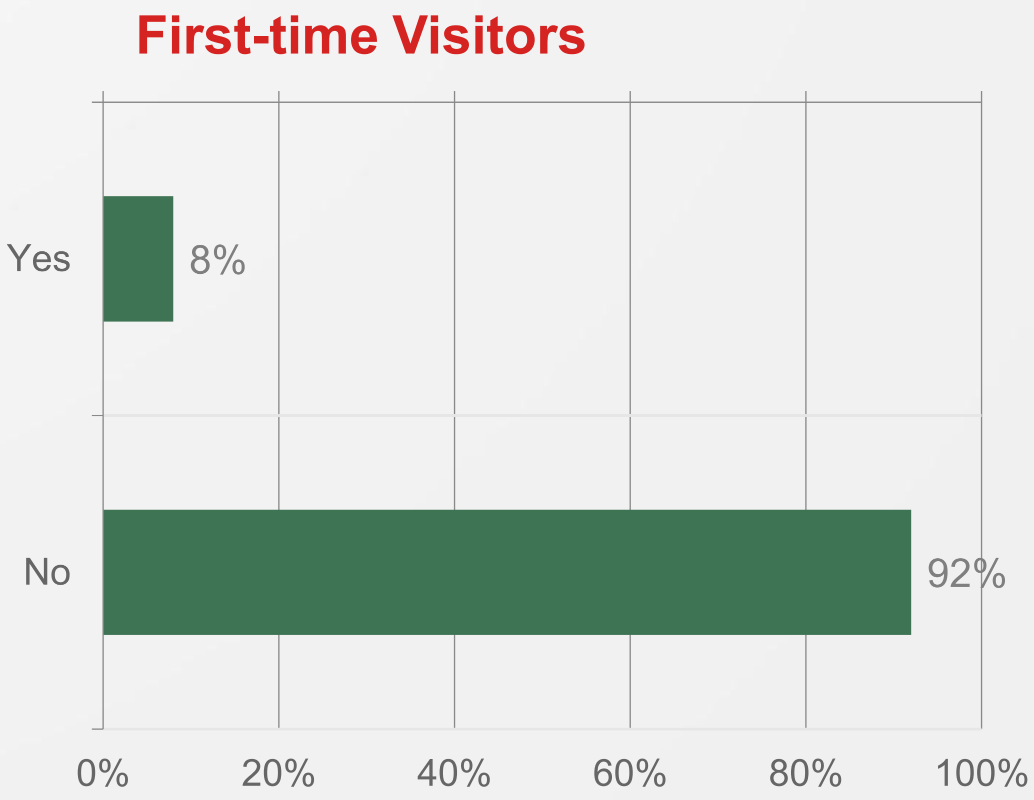
2. WHO ARE THE VISITORS TO SOUTH SAVO?



The majority of visitors to South Savo are repeat visitors (92%).

South Savo also attracts new visitors, as just under one in ten visitors (8%) were visiting the region for the first time. Among these first-time visitors, just under half (43%) had heard about the destination from friends or relatives, and around **38% through tourism websites or blogs**.

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2. WHO ARE THE VISITORS TO SOUTH SAVO?

KEY FINDINGS

- **Visitor flows are strongly oriented towards Finland's major population centres, particularly the Uusimaa region.** More than one third of visitors live in Uusimaa (37%), highlighting the importance of the Helsinki metropolitan area for South Savo. Residents of South Savo itself also form a significant group (13%), indicating active nearby travel and the role of leisure housing.
- **The visitor profile is clearly skewed towards older age groups.** More than half of respondents are aged 55 or over (51%), while only 12% are under 35. This reflects the region's attractiveness as a calm, nature- and culture-oriented destination, but also points to challenges in reaching younger visitor groups.
- **Women constitute a clear majority of respondents**. A total of 66% of respondents were women, although travel parties typically include other companions as well.
- **Travel companions are most commonly adult couples, but diversity is notable.** The most frequent travel companion is a partner or spouse (60%). Visitors also travel with friends (17%), other family members (18%), or children (16%). Solo travellers (15%) and visitors travelling with pets (10%) form smaller but clearly identifiable segments, highlighting the diversity of tourism patterns.
- **The high share of repeat visitors indicates strong attachment to the region.** As many as 92% of visitors have previously visited South Savo. This exceptionally high figure supports the view that the region functions as a "regular destination," particularly for leisure-home owners and nearby residents. First-time visitors account for only 8%, suggesting untapped potential to increase visibility among new target groups.
- **First-time visitors most often arrive through personal recommendations and digital channels.** Almost half (43%) heard about the destination from friends or relatives, while around 38% learned about it through tourism websites or blogs. This underscores the importance of both social networks and online visibility for tourism growth.

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3. REASONS FOR VISITING AND SUSTAINABLE TOURISM

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3. REASONS FOR VISITING AND SUSTAINABLE TOURISM

South Savo is suited to a diverse range of tourism activities, combining cultural offerings with natural environments, lake landscapes, and a tranquil setting. The region's key attraction factors are reflected in visitors' reported motivations for travelling to the area.

The most frequently cited motivations for visiting are cultural visits (65%), nature-based experiences (58%), local food and drink experiences (42%), and water-based activities (38%).

Additional reasons for visiting South Savo include staying at a privately owned holiday home, visiting relatives, and meeting friends or acquaintances.

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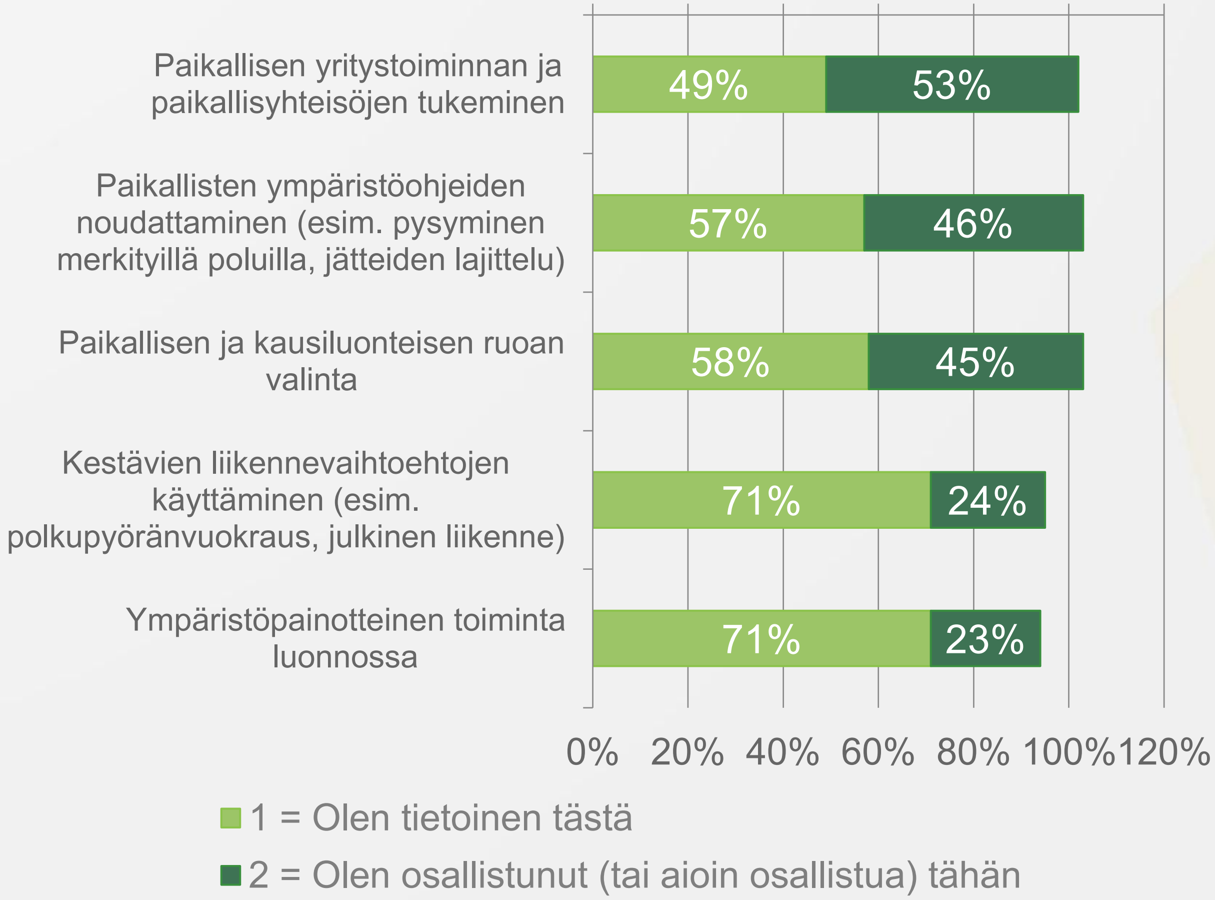
3. REASONS FOR VISITING AND SUSTAINABLE TOURISM

Awareness of and participation in sustainable tourism activities



Awareness of sustainability-related activities among visitors to South Savo is moderate; however, actual participation remains limited.

The activities most commonly participated in (or intended to be participated in) include supporting local businesses and communities (53%), following local environmental guidelines (46%), and choosing local, seasonal food (45%).

Lower levels of participation are reported for the use of sustainable transport options (24%) and environmentally focused activities in nature (23%), even though awareness of these activities is relatively high. Lower participation in these areas may be explained, among other factors, by a preference for private car use and a stronger emphasis on cultural visits.

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3. REASONS FOR VISITING AND SUSTAINABLE TOURISM

KEY FINDINGS

- **Visitors' motivations highlight South Savo's core strengths.** Tourists are primarily drawn by cultural experiences (65%), nature-based experiences (58%), and local food and drink (42%). Water-based activities (38%) further reinforce the region's profile as a lake-based destination. The strength of these attraction factors indicates that the region's core identity is clear and meaningful to visitors.
- **Staying at second homes and visiting relatives complement tourism motivations.** A share of visitors travel to the region to stay at their own holiday home, visit relatives, or meet friends. This segment is often strongly attached to the region and contributes to the stability of tourism demand, even though it may not always make intensive use of commercial tourism services.
- **Sustainability is a recognised theme, but it is not yet strongly translated into action.** While most visitors are aware of sustainable choices, actual participation remains moderate. This suggests a gap between values and practices, with sustainability manifesting in visitors' everyday behaviour mainly through passive or low-effort choices.
- **The most common implemented or intended sustainable tourism actions relate to simple, everyday decisions.** Supporting local businesses (53%), following environmental guidelines (46%), and choosing local food (45%) are clearly the most frequent practices.
- **Lower participation is observed in activities that require alternative services or clearer guidance.** The use of sustainable transport options (24%) and environmentally focused activities in nature (23%) remain limited. This is likely linked to the strong reliance on private car use in tourism, as well as the (perceived) limited availability of public transport.
- **Overall, the findings highlight significant potential to make sustainable tourism a more visible, accessible, and attractive part of the visitor experience.** Visitors are generally positively disposed towards sustainability, but practical choices depend on concrete service offerings, accessibility, and clear, easy-to-implement options.

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4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

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4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

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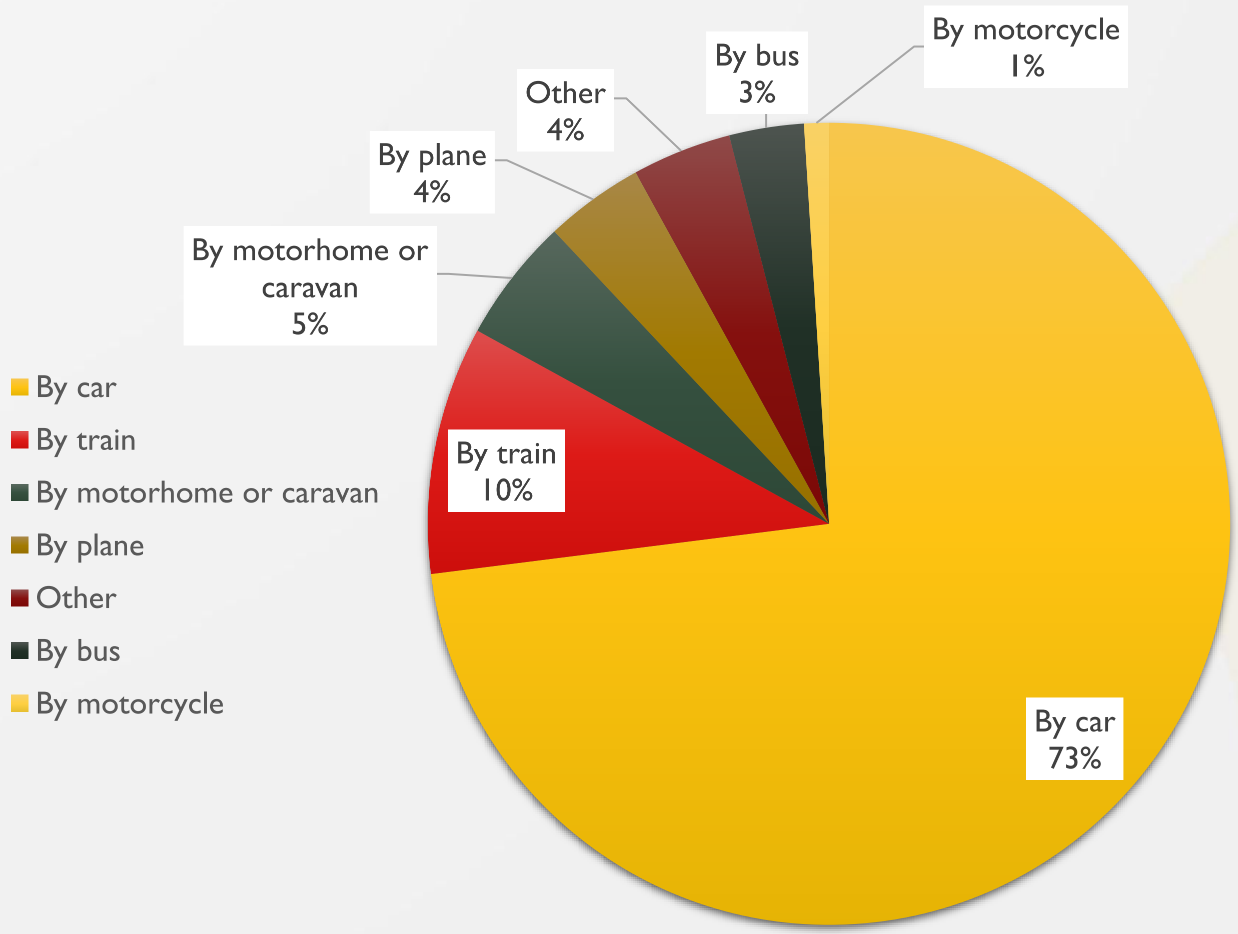
Visitors' Modes of Transport to South Savo



The private car is by far the most common mode of transport (73%), highlighting the region's strong dependence on private car use in terms of accessibility.

The train (10%) is the second most common public transport option, but its use remains clearly limited to a minority of visitors.

Motorhomes or caravans (5%) and air travel (4%) account for relatively small shares of arrivals.

Bus use (3%) is very limited.

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4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

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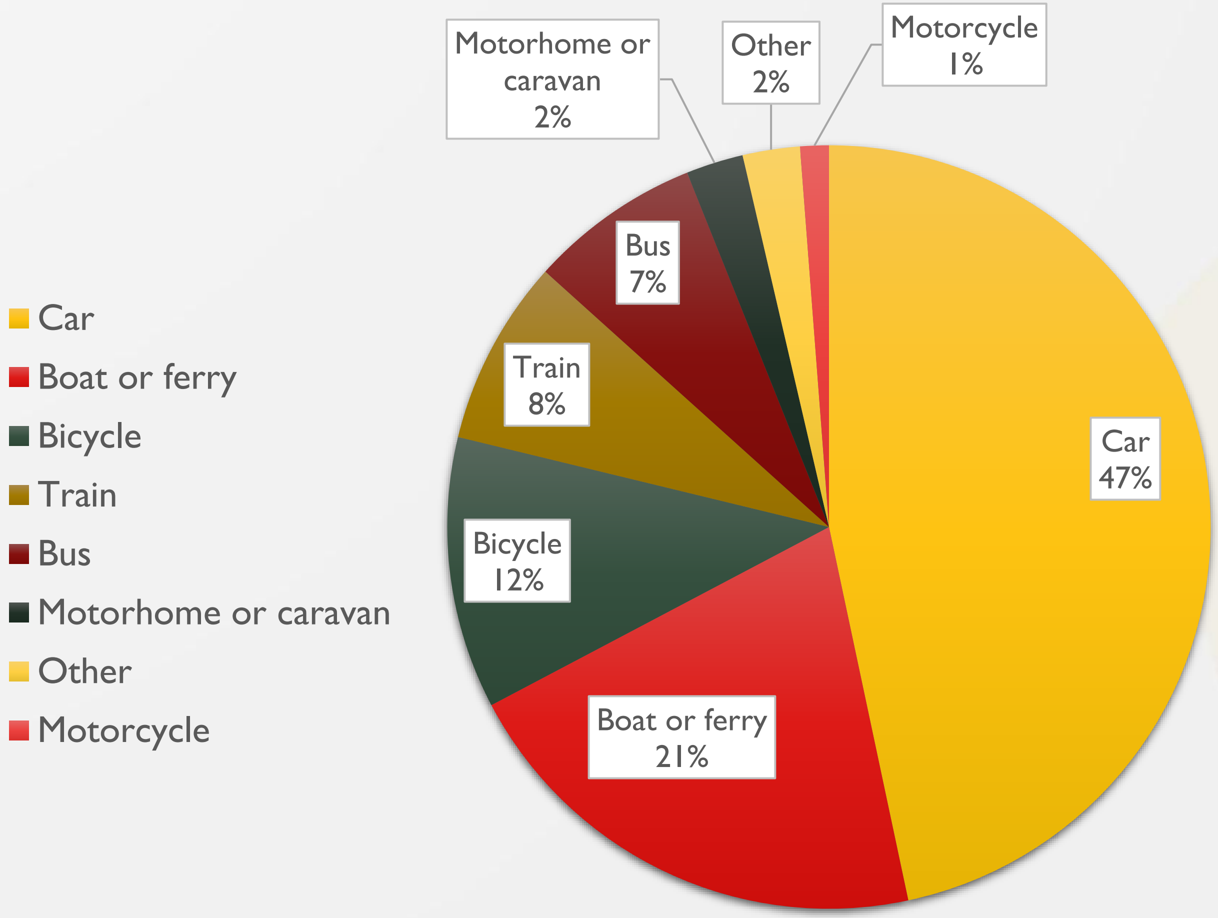
Modes of transport within the region



The car is clearly the most commonly used mode of transport within the region (77%), underlining its importance for both arrival and local mobility.

Water transport (boat or ferry, 34%) is the second most common mode, reflecting the strong role of lake tourism and water routes in the region.

Cycling (19%) is moderately common, but continues to offer development potential from a sustainable mobility perspective.

Train (13%) and bus (12%) use remain clearly lower, pointing either to limited connections or to visitors' preference for private modes of transport.

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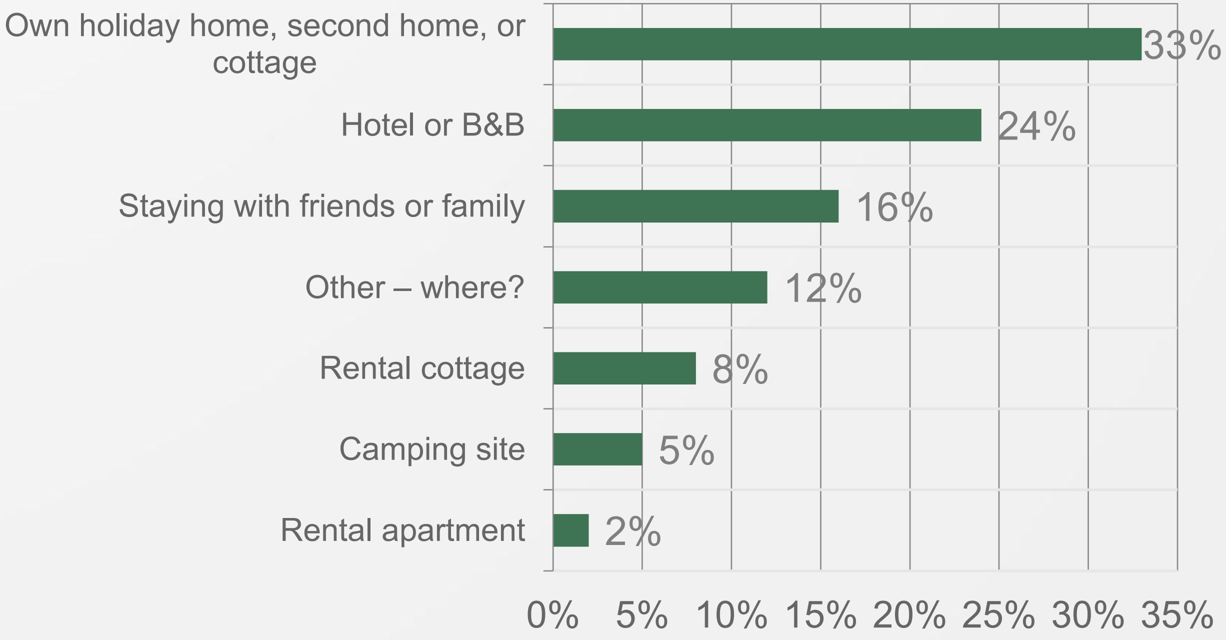
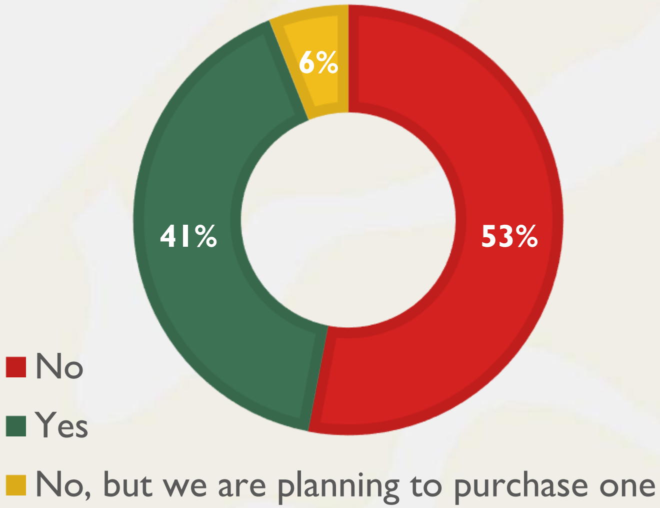
4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

Accommodation Type



Second-home Ownership



The most common accommodation type is a private holiday home, second home, or cottage (33%), highlighting the strong role of leisure housing and cottage culture in the region.

Hotels and B&Bs (24%) are the second most common option, while staying with friends or family (16%) and other types of accommodation (12%) complement the overall picture.

Rental cottages (8%) and camping sites (5%) account for a smaller but still important share of the accommodation supply.

Second homes are owned by 41% of respondents, indicating a strong attachment to the region and potential for continuity in the local economy.

More than half of respondents (53%) do not own a second home, but **6% plan to acquire one**.

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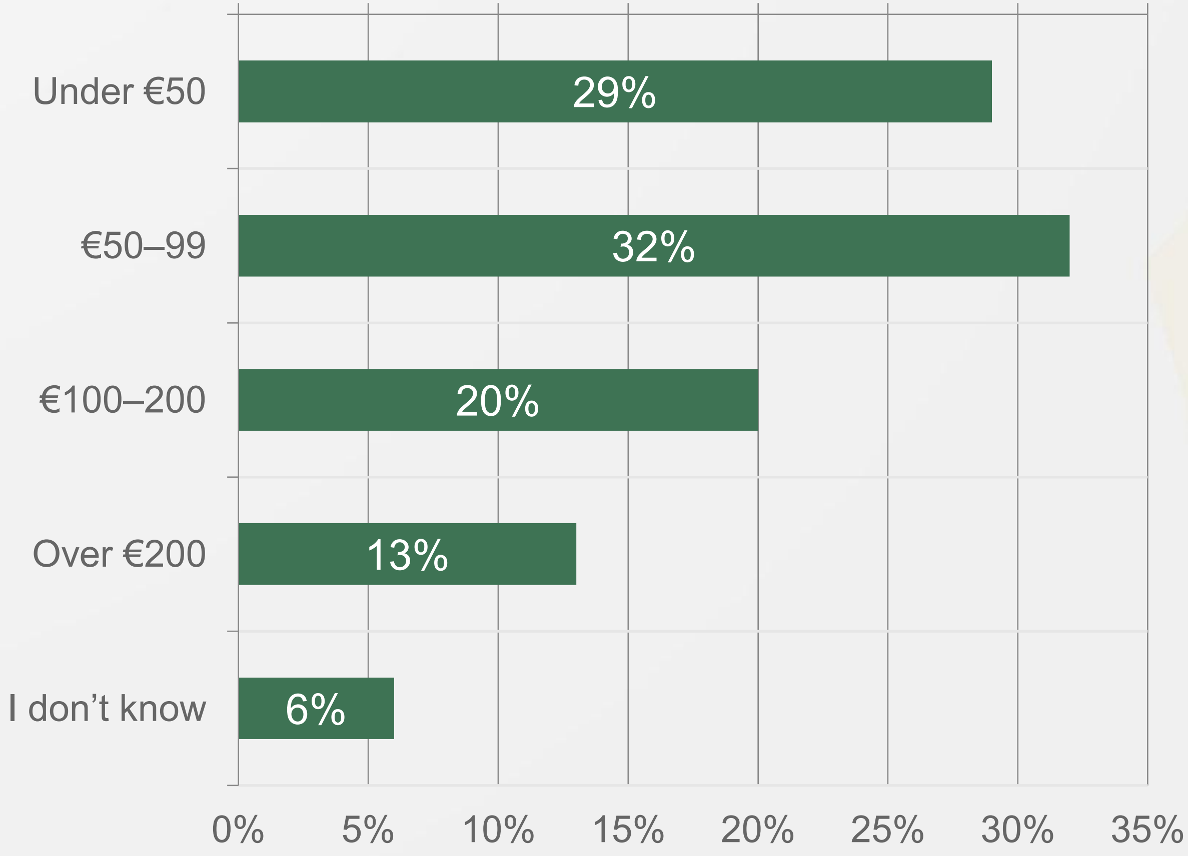
4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

Estimated Daily Expenditure of Visitors*

* Including Accommodation, Activities, Food, Shopping, etc.



The majority of visitors report moderate daily expenditure. 32% estimate their daily spending to be €50–99, while **29% spend less than €50 per day**.

A further 20% spend €100–200 per day, and 13% spend more than €200, indicating that the region also attracts visitors with higher spending potential.

Overall, the findings suggest that visitor spending in South Savo is concentrated at a middle-income and moderate price level, highlighting the importance of affordability and value for money.

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4. ACCOMMODATION, LENGTH OF STAY, SPENDING, AND THE LOCAL ECONOMY

KEY FINDINGS

- **Arrival and local mobility rely heavily on private car use.** The car is clearly the dominant mode of transport both for arriving in the region and for getting around locally. Limited use of public transport constrains accessibility for car-free and international visitors.
- **Leisure housing forms the most stable foundation of tourism demand**. Around **33% stay in their own holiday home or second home**, **and 41% of respondents own a second home**. This creates long-term attachment to the region and could support more year-round demand for services.
- **Demand for accommodation services is fragmented.** Hotels and B&Bs (24%) play an important role, but the majority of visitors stay in cottages or private accommodation. This disperses spending spatially and increases the need for a broad and diversified service offering.
- **Sustainable mobility and water routes offer growing potential**. Cycling (19%) and water-based transport (34%) highlight opportunities to develop nature-based and environmentally friendly travel modes.
- **Visitor spending is moderate** on average, but the market is segmentable. Most visitors spend €50–99 per day, while those spending over €100 per day represent a significant growth segment for the development of services and experiences.
- **Local economic impacts are multifaceted**. The long-term attachment of leisure residents, combined with a steady flow of short-term visitors, together strengthen the region's economic base.

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5. VISITOR SATISFACTION AND SERVICE PRESSURES

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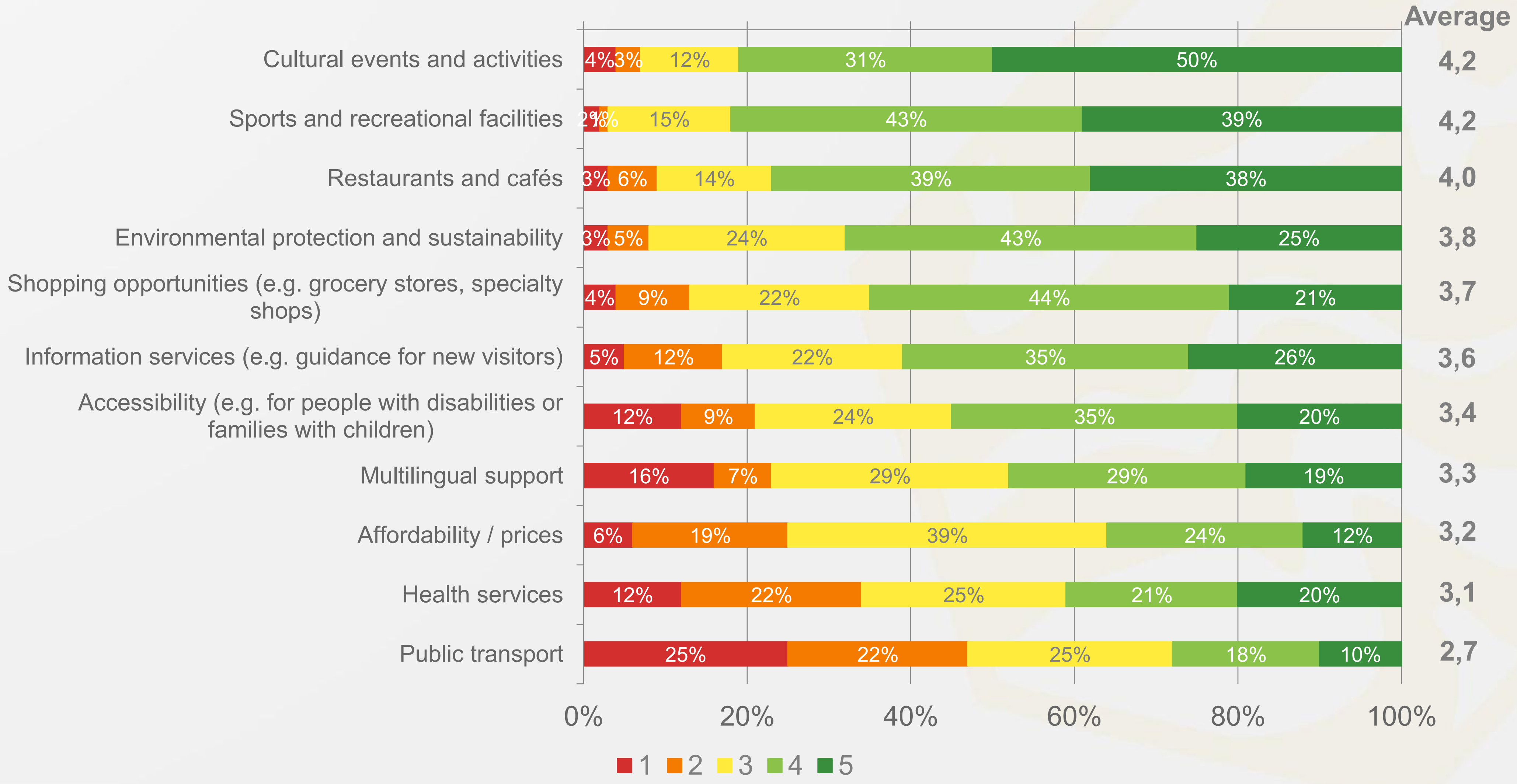
5. VISITOR SATISFACTION AND SERVICE PRESSURES

Visitor satisfaction with local services and facilities



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5. VISITOR SATISFACTION AND SERVICE PRESSURES

Visitor satisfaction with local services and facilities

The highest levels of satisfaction relate to cultural events and activities, as well as sports and recreational opportunities (average score **4.2**).

Restaurants and cafés also receive very positive ratings (4.0).

Visitors are generally satisfied with environmental protection and sustainability, as well as shopping opportunities (average scores **3.7–3.8**).

Public transport (2.7) and health services (3.1) receive lower ratings compared to other services, pointing both to limited use and to potential development needs in terms of accessibility and basic services.

"Best aspects: a relaxed holiday destination, friendliness, and culture."

"I love Lake Saimaa and its clean waters, the beauty of nature, and the many opportunities for hiking and cycling."

"Cultural events could be made more diverse so that they would also attract younger audiences."

"Improvements are needed in public transport and in restaurant opening hours."

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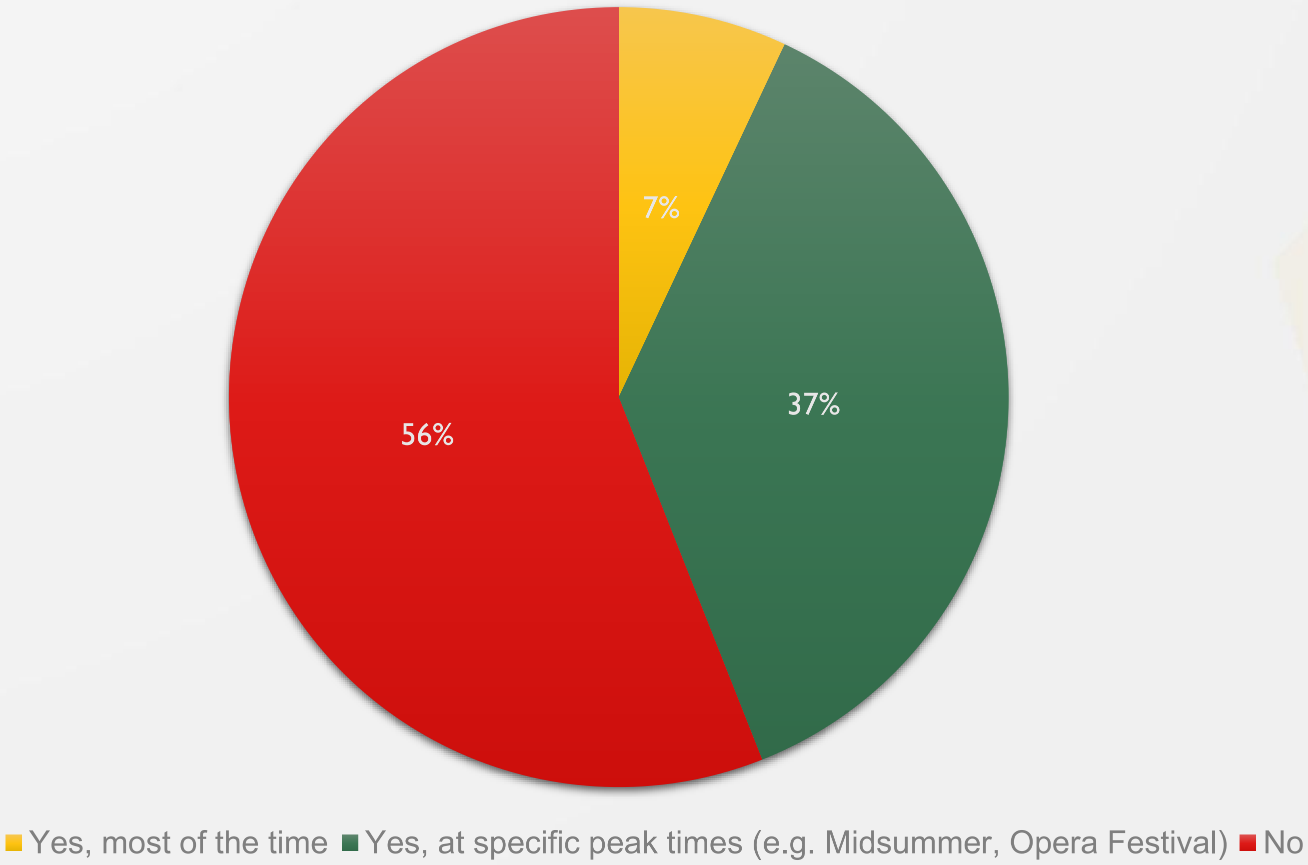
5. VISITOR SATISFACTION AND SERVICE PRESSURES

Service congestion and seasonal pressure



More than half of respondents (56%) do not experience congestion in services, suggesting that service capacity and infrastructure function well overall, even during the tourism season.

37% report congestion at specific peak times, such as Midsummer or during the Opera Festival, when visitor numbers increase rapidly.

Only 7% report that services are often congested, indicating that widespread capacity constraints are rare.

The findings highlight the need for seasonal anticipation and temporary service enhancements, rather than permanent increases in resource allocation.

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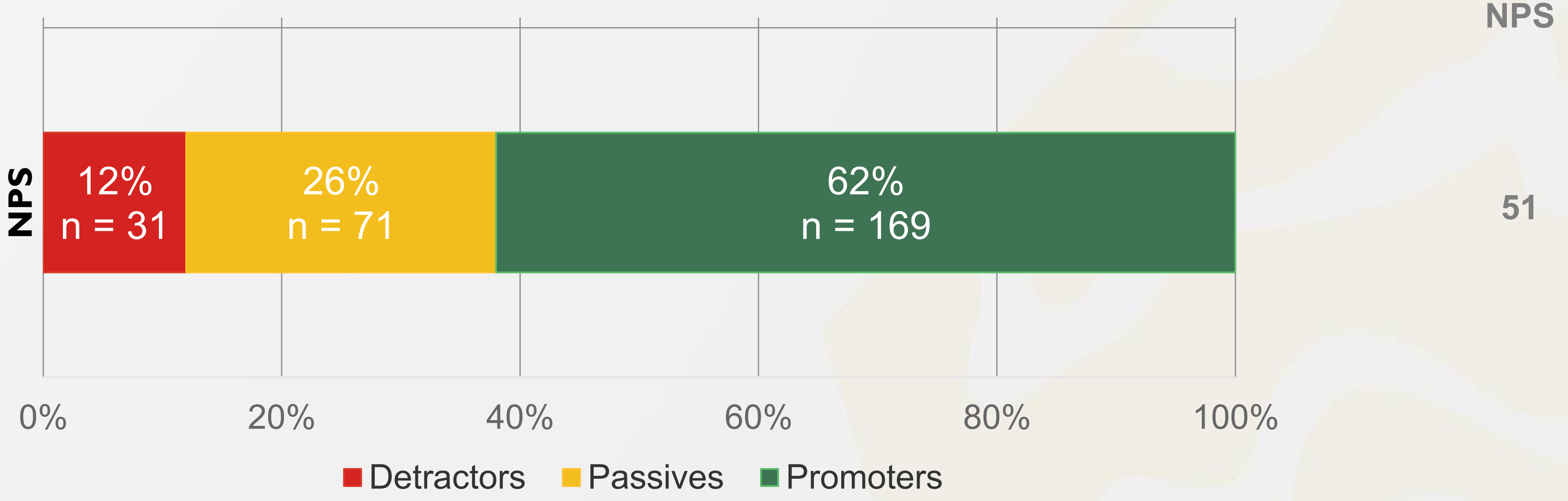
5. VISITOR SATISFACTION AND SERVICE PRESSURES

Willingness to recommend the destination (Net Promoter Score, NPS)



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The Net Promoter Score (NPS) is an internationally used indicator of customer satisfaction and loyalty. Scores range from **–100 to +100**, with values **above 50 considered very positive**.

Among respondents, 62% are promoters, 26% are passives, and 12% are detractors.
The resulting NPS of 51 is a very strong outcome, indicating that the majority of visitors are satisfied and willing to recommend the destination to others.

This result also supports other findings pointing to a high level of service quality and overall visitor experience.

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5. VISITOR SATISFACTION AND SERVICE PRESSURES

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KEY FINDINGS

- **Overall satisfaction levels are high.** The **highest ratings are given to cultural events, outdoor and recreational opportunities, and restaurants and cafés** (average scores 4.0–4.2). Satisfaction with environmental protection and sustainability is also generally strong, reinforcing the region's appeal as a combined cultural and nature-based destination.
- **Development needs are most evident in accessibility.** Clear challenges relate to accessibility and mobility, with public transport receiving the lowest rating (2.7). This reflects limited alternatives for visitors who do not travel by car.
- **Service congestion is generally well managed and temporary.** A majority of respondents (56%) do not experience congestion at all, and only 7% report frequent congestion. Capacity pressures are concentrated around peak periods such as Midsummer and the Opera Festival and do not require permanent additional resourcing, but rather seasonal anticipation and temporary solutions.
- **Visitor experience is strong, and willingness to recommend is high.** An NPS of 51 is a very positive result, with 62% promoters and only 12% detractors. This supports the conclusion that local services and the overall environment deliver a high-quality and positive visitor experience.
- **Visitor feedback highlights both strengths and areas for improvement.** Nature, cultural offerings, and friendliness are perceived as key strengths, while requests for improvement focus on diversifying cultural content, extending restaurant opening hours, and improving the functionality of public transport.

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6. VISITOR EXPERIENCES

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6. VISITOR EXPERIENCES

POSITIVE EXPERIENCES	KEY AREAS FOR IMPROVEMENT
Culture & Events	
Opera performances, concerts, and summer events are major highlights for visitors. Savonlinna's historical setting and cultural offering make a strong impression.	Awareness and visibility of cultural events should be improved, and August programming should be expanded beyond the opera season.
Sports & Recreational Opportunities	
Nature trails, swimming, and cycling are highlights of many visits.	More information and better accessibility to sports and nature sites are needed, as well as public saunas and ice-swimming locations.
Tourism & Marketing	
Visitors appreciate the beauty of Savonlinna and Lake Saimaa, as well as the combination of nature and culture.	Year-round marketing, along with improved event communication and more information available in English.
Restaurants, Cafés & Service Quality	
Good food, market life, and friendly service stand out in positive feedback.	Restaurants close too early, service quality varies, and there is demand for more high-quality vegetarian and local food options.
Transport Connections & Accessibility	
Train connections; water transport offer memorable travel experiences.	Public transport – without a car it is difficult to reach nature destinations; parking in the town centre of Savonlinna is perceived as challenging at times.
Infrastructure & Environment	
Savonlinna's cleanliness, flower plantings, and lake scenery receive considerable praise.	Road conditions, a lack of public toilets and waste bins, and outdated information boards are perceived as problems.
Entrepreneurship & Cooperation	
The friendliness of local entrepreneurs and the atmosphere at the marketplace are widely appreciated.	Stronger cooperation between businesses, extending the tourist season, and better support for traditional local retail shops.

Visitors emphasise South Savo's key strengths as the nature of Lake Saimaa, cultural offerings, and friendly service.

The most significant development needs relate to service opening hours, extending the tourism season, accessibility, and improved communication.

The region is seen as having considerable potential for year-round tourism, provided that cooperation, infrastructure, and the overall visitor experience are developed in a coherent and systematic manner.

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6. VISITOR EXPERIENCES

Culture and Events

“Summer in Savonlinna, the Opera Festival, and the best inland cruise ever in Savonlinna.”
“An unforgettable concert at Olavinlinna.”
“More small-scale public events around the city are needed, not just opera openings.”
“In August, restaurants are closed in the evenings! The season should be extended in August in the same way as in July.”

Sports and Recreational Opportunities

“Swimming in the lake and exploring the beautiful outdoor islands.”
“Nature-based tourism services are the best. The development of Linnansaari National Park and cycling routes is excellent!”
“More information is needed in one clear place about available sports and recreational opportunities.”
“Nature was the best part. Road conditions could be improved in some areas.”
“More drinking water points and public toilets are needed.”
“The scenery is beautiful, but cleanliness has declined since my last visit.”

Restaurants, Cafés, and Service Quality

“…a wide range of restaurant services.”
“The food was excellent, and the scenery was absolutely stunning.”
“After concerts in August, it’s not possible to get food anywhere.”
“More emphasis on vegetarian and local food options is needed in local restaurants.”

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6. VISITOR EXPERIENCES

Transport Connections & Accessibility

"Local public transport does not function properly – without a car it is difficult to access ski trails or nature paths."
"More mobility options are needed for people who travel without their own car."
"Parking in Savonlinna needs reform – fees discourage customers."
"Traffic and parking in the town centre could be improved."

Tourism and Marketing

"More year-round domestic and international marketing is needed for activities in the Savonlinna area."
"Savonlinna brochures and maps should also be available in local shops."
"Better coordination of events is needed, so that events are not scheduled at the same time as those in neighbouring municipalities."

Entrepreneurship and Cooperation

"Support for local small businesses! Companies in the accommodation and restaurant sector could combine their expertise and extend their opening seasons."
"There could be more cooperation between different tourism and event businesses."
"Please remember to preserve local retail shops—moderating rents during the low season would be important."

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7. CONCLUSIONS & THEMES FOR FURTHER DISCUSSION*

- Proposals for joint review by municipalities & local actors, businesses, and regional networks

Theme	Possible Development Directions for Municipalities & Local Actors	Possible Development Directions for Businesses	Possible Shared Focus Areas for Regional Actors / Networks
1. Accessibility & mobility	Could local transport and route connections be improved (e.g. national parks, archipelago)? Is there a need to develop parking, signage, or visitor flow management? How could village-level routes and accessibility be made more consistent?	How could companies support easier mobility for visitors without cars (e.g. shuttles, transfers)? Could packaging of transport and services be expanded?	Is there a need for a regional "car-free tourist" concept? How should regional transport development be organized?
2. Year-round tourism & extending seasons	What events or services could be offered outside the peak season? How could village associations and local actors help activate low seasons?	What year-round products or services could businesses develop? Could opening hours be extended in August or during events?	Should a regional model be created to strengthen year-round tourism?
3. Culture, nature & attractions	How could local cultural and village events be supported or strengthened? Where is improved signage or service infrastructure needed along routes or at sites?	What new content and services could attract younger visitors? How could the offering of nature-based services be expanded?	Is there a need for a shared culture-nature narrative and better coordination of events?
4. Sustainable tourism	Is waste management and toilet capacity sufficient at popular sites? How could signage and visibility of sustainable choices be improved?	How could responsible practices be made more visible and easier for customers to engage with?	Is a shared "Sustainable South Savo" guideline or brand needed?
5. Services & customer experience	Is clearer signage, lighting, or improved mobility environments needed? How should opening hours be better coordinated with events?	How could service quality and customer experience measurement be developed?	Could customer experience data collection become a regional joint activity?
6. Marketing & visibility	Is there a need for better communication or promotional materials for local events (also in villages and shops)?	How could more multilingual and up-to-date online content be produced?	Is there a need to unify the regional brand (lake nature + culture + responsibility)?
7. Entrepreneurship & cooperation	How could municipalities and villages support small businesses during low seasons? Is there a need to strengthen community-based tourism solutions?	How could inter-company product packaging and joint offerings be increased?	Is there a need for a permanent forum for joint development among actors?

APPENDIX: METHODOLOGY AND ACKNOWLEDGEMENTS

- The South Savo Visitor Survey was conducted in 2025 as part of the GRANULAR project, in cooperation with local stakeholders.
- We thank Savonlinna Travel Ltd for supporting respondent outreach and motivation, and for promoting the survey on its website and social media channels.
- The survey was open from 8 July to 31 August 2025.A total of 271 responses were collected (online and on-site).
- The analysis and synthesis were carried out as researcher-led work, supported by AI-assisted tools, particularly for structuring the text and condensing summaries.

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Thank you – Kiitos - Tack

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