



**United Kingdom Market Report**  
May 2019

Visit Finland Country Representative

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# Semiannual Report – UNITED KINGDOM

## Winter season 2018-19 and outlook for summer 2019

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# Factors affecting the results of the winter season 2018-19

## Reasons for the increase/decrease in overall outbound travelling from your market?

- There were an estimated 4.3 million visits overseas by UK residents in November 2018, which was the same as in November 2017 and 3.8 million visits overseas in December 2018, 4% less than 2017
- 2018 has been a year of uncertainty, both politically and economically. It has been a particularly tough year for the high-street; with well-known retail brands such as Maplin and Toys'R'Us closing down, and House of Fraser and Mothercare, Debenhams reducing the number of stores. In spite of this, holidays remain a spending priority, although a continued weak Pound means the desire to get a value-for-money break has strengthened and is reflected in people's choices.
- While consumers remained unshaken in the first few months of 2019, the index was down by four points year-on-year, according to the GfK Consumer Confidence Index.
- Consumer confidence [rose a single point from -14 in February](#), the first time the index had risen since August last year, when it rose by three points to -7. However, it fell the following month and continued falling to -14 where it remained through December and January. The last time consumer confidence has been in positive territory was in January 2016 in the lead up to the Brexit referendum. Joe Staton, client strategy director at GfK, said that in spite of "political carry on in the Westminster bubble" and the looming Brexit deadline, consumers "remain unshaken" and are "holding firm," while noting that the index does however still remain in negative territory.

# Factors affecting the results of the winter season 2018-19

## Reasons for the increase/decrease in travelling to Finland?

### Changes in demand

- Late bookings reported amongst the UK Tour Operators and anxiety to fill allocations on flights and accommodation
- The winter is very strong to Finland from the UK thanks to the strong offering from Lapland, active Finnish partners and new accommodation and competitive rates from Operators to suit all budgets

### Finland's image as a travel destination

- Still predominantly strong winter image and December with Santa holidays, however Nov/Jan and February strong with winter activity and Northern lights. Finland is gaining recognition as a Nordic ski and Northern Lights destination

### Changes in distribution & Accessibility

- During Winter months the seat capacity grew by 11.5% / direct flights 11.3%
- TUI had added 2 new ski resorts in their programme and direct flights from Birmingham to Kuusamo
- EasyJet started flight direct to RVN from November – March 2019
- Finnair altered timings of their direct KTT and IVL flight from LGW
- TO's put in new winter product and had ample allocation

# Factors affecting the results of the winter season 2018-19

## Reasons for the increase/decrease in travelling to Finland?

### Products that have been attractive

- New openings in Rovaniemi like Apukka Resort, who have done an excellent job of getting their product known with the key UK TO's
- Lakeland winter bookings with snow activities

### Regions that have been attractive

- Inari Saariselkä, Rovaniemi and Levi, Ylläs and Kuusamo have all been very popular

### Campaigns, joint promotions results

- Best served Scandinavia were up 40% Autumn and Winter months in sales after multi channel UK marketing campaign 2018
- Artisan, Inghams, TUI Crystal Ski reported increases in traffic and bookings after the campaigns

# Outlook for the summer season 2019

## The overall outlook of travelling to Finland for the coming summer?

### **Increase/decrease and reasons for the increase/decrease**

- Despite the uncertainty around Brexit forward bookings have increased by 12% in Europe
- The Lates market is very strong and people are booking on a more normal level since Brexit is delayed until October 31<sup>st</sup>. If things stay unsettled with the UK government this could make pound weaker and confidence low again
- Osprey Holidays short break specialists have seen a bounce in sales and bookings up 78% compared with last year plus other operators noticed a spike in April bookings too
- New flights Wizz Air from Luton could attract more Brits travelling to the lesser known city of Turku and surrounding Archipelago region. Campaign from Visit Turku and campaigns with Magnetic North deep sleep and Best Served campaigns to increase not only awareness and sales of their product, but can add in new accommodation and Summer activities
- During Summer 2019 Season Finnair will operate up to seven daily flights from LHR, this will create 21% more capacity compared to the Summer 2018 schedule

### **New summer products**

- Nature and Fly drive products from Helsinki and Lakeland
- Polarlife product in Inari- Saariselkä
- Wild Taiga Bear Cabins and Bird Houses are popular for UK TO's who are looking for quality accommodation for bears

### **New sales channels**

- Direct flights from London Luton to Turku from June 2019
- Martin Randall have groups coming to Savonlinna Opera and Sibelius Festival in Lahti early September 2019
- Trailfinders own fly drive product Helsinki, Lahti, Tampere
- Long Travel new Lakeland, Helsinki and Lapland product

# Outlook for the summer season 2019

The overall outlook of travelling to Finland for the coming summer?

## What are the trends for the summer 2019?

- Increase and demand in city breaks (48% took city breaks in 2018 ABTA)
- Cruising
- 1/12 UK holidaymakers are planning on a cruise
- Countryside break
- All inclusive holidays
- Beach holidays
- Responsible Travel
- Wellness Travel

## Which are the traveller segments?

- Outdoor and nature lovers
- Comfort Seekers
- City breakers
- Family travellers
- Culture vultures
- Couples
- Cultural groups
- Solo Travellers (increased by 22% in 2018)

# Outlook for the winter season 2019-20

## Ad hoc marketing opportunities

- TO cooperation, joint promotions, crossover, events, PR, social media

## Joint Marketing Activities

- **Best Served Scandinavia, Destinology, Artisan, Discover The World** to push the shoulder seasons
- **TUI Ski videos** to boost the awareness of Finland's Ski areas to TUI's repeat customers and for new business
- **Long Travel, Trailfinders**, new Lapland product
- **Barrhead Travel** – travel agents to be trained on Finland and extended Winter promotion

## Events

- **PR Summer/Autumn event TBC**
- **Luxury Travel day and Summit** October 2019
- **WTM London 2019** 4-6 November 2019
- **Five Countries Workshop** 4 Feb 2020



# Prospects for the autumn/winter season 2019-20

## The overall outlook of travelling to Finland?

**What trends should be considered in product development to increase the demand in the autumn/winter time?**

**Northern lights** – healthy Increase in Autumn Lapland 2018 and more marketing activities to boost awareness

**Outdoors** – nature and experiences through adventure media and branding

**Ski Operators** – new growth markets (Headwater Holidays brand new Ski destination Ylläs)

**Christmas Markets Helsinki** – good product – could be combined with Tallin

**Lakeland** – has seen good growth for the winter

**Which present target groups should be considered to increase the demand?**

Photographers

School groups

Nature lovers

Aurora enthusiasts

Comfort seekers

**Which new target groups should be considered to increase the demand?**

**Christmas shoppers** looking for a new city culture Experience

**Luxury travellers** looking for nature, unique accommodation under the Northern Lights

# Theme check: Sustainability, digitalization and year-round tourism

Visit Finland strategic cross-cutting themes are sustainability, digitalization and year-round tourism.

**Sustainability** – This is a strong theme and hot topic of interest for the UK. Research was conducted in 2018 to UK operators and the messaging is very strong with some operators adding clear responsible travel focus to their company websites. TUI has pledged to deliver 10 million greener and fairer holidays by 2020.

**Digitalisation** – Very prominent at the moment in the UK with mobile, tablet devices still strong for search and bookings, although the traditional travel agent bookings are on the rise again. Skyscanner is the UK no.1 flight search and Love Holidays seeing some of the fastest growth. Service based technology is making travellers lives easier. Four Seasons have the first sunscreen booth that applies cream to your body in 10 seconds.

**Year-round tourism** – Finland has clear and wonderful seasons with naturally strong USP's. In order to make the Summer take off money needs to be invested heavily in to strong consumer campaigns to target those who would choose Norway or Sweden for their holidays.

# Trends and other relevant travel related topics

## Trends

- **Countryside breaks**
- **City breaks**
- **All inclusive holidays**
- **Beach holidays**
- **Responsible Travel**
- **Wellness Travel**

## New distribution channels

- **FAM trips** is very important to get new product and tours on sale and sales staff confident in selling Finland first hand

## Online channels

- **Work with Skyscanner** in the UK to attract more awareness about the destination and Finland searches to the 1.6 million searches to Finland per year
- Social Media – **Facebook Travel Gossip** is the UK's no 1 portal for Travel agents/trade
- **Good media banks** with strong selection of Summer and family shots

# Trends and other relevant travel related topics

## Competitors' actions

- **Qantas** have produced a series of youtube 360 virtual reality videos of Australia  
<https://www.youtube.com/watch?v=aq9nXIVTkug>
- **Visit Britain I Travel for** – themed approach <https://www.visitbritain.com/gb/en/i-travel/fun>
- **Jamaica** – Sustainable angle - [https://www.ttgmedia.com/news/features/a-jamaican-adventure-beyond-the-beach-17982?utm\\_source=newsletter&utm\\_medium=email&utm\\_campaign=Midday%20Bulletin&AutoLogin=1](https://www.ttgmedia.com/news/features/a-jamaican-adventure-beyond-the-beach-17982?utm_source=newsletter&utm_medium=email&utm_campaign=Midday%20Bulletin&AutoLogin=1)
- **Visit Scotland** – interesting themed approach all the great experiences associated with 2019 **vibrant Coasts and Waters**. free online [toolkit](#)

# Trends and other relevant travel related topics

## Free word

**Something else that you would like to say to the Finnish travel trade**

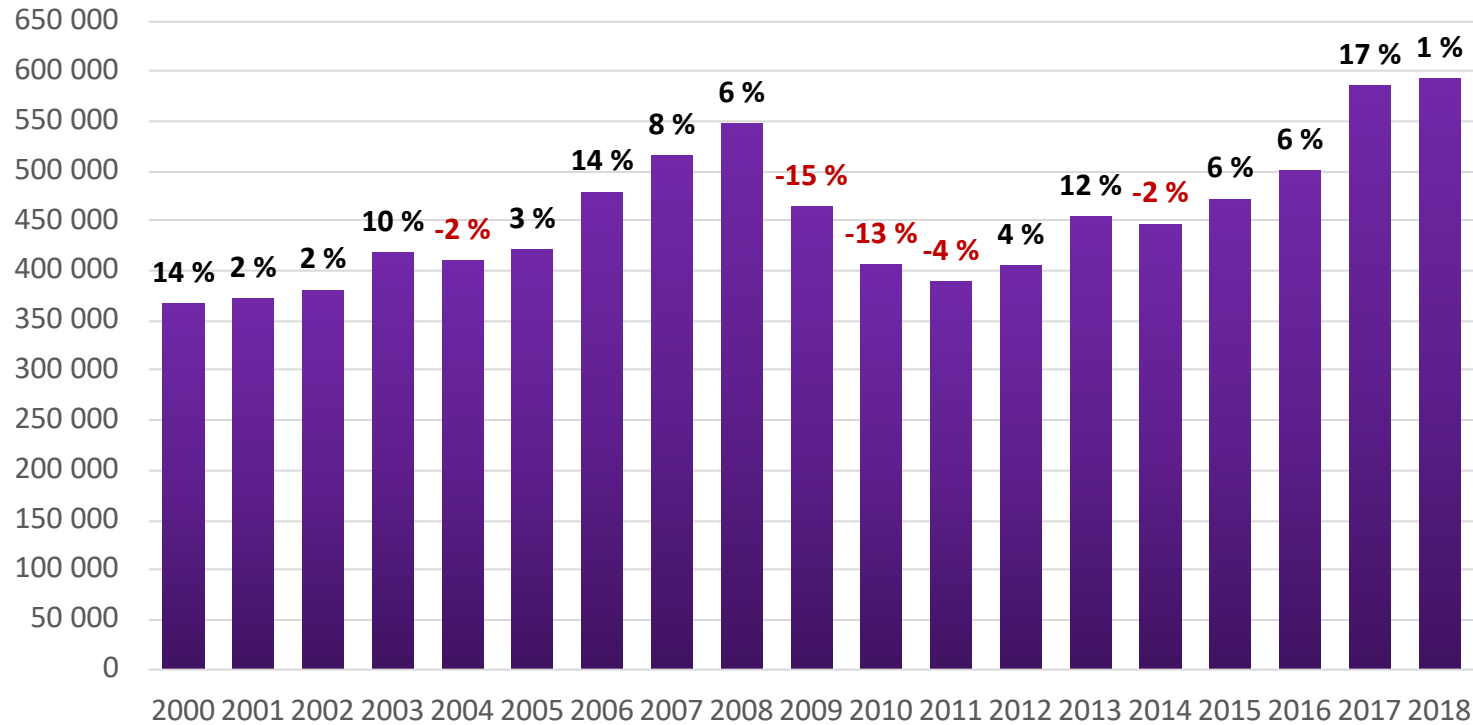
Thank you for your support with the UK Market

# UK – Market Review



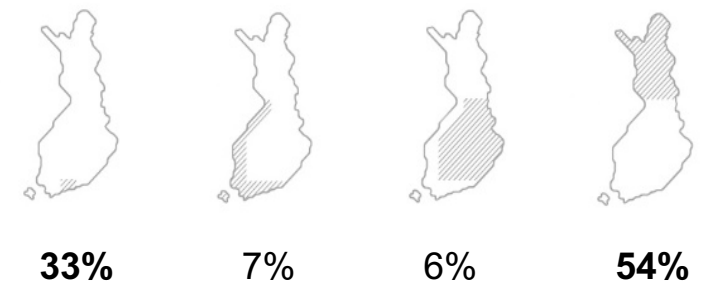
Visit Finland

# British overnights in Finland



**Year 2018**  
**3<sup>rd</sup>** in country rankings  
 with a **9% share** of foreign overnights  
 Average change 2000-2018: **+4%**  
 Change 2018 compared to 2000: **+62%**

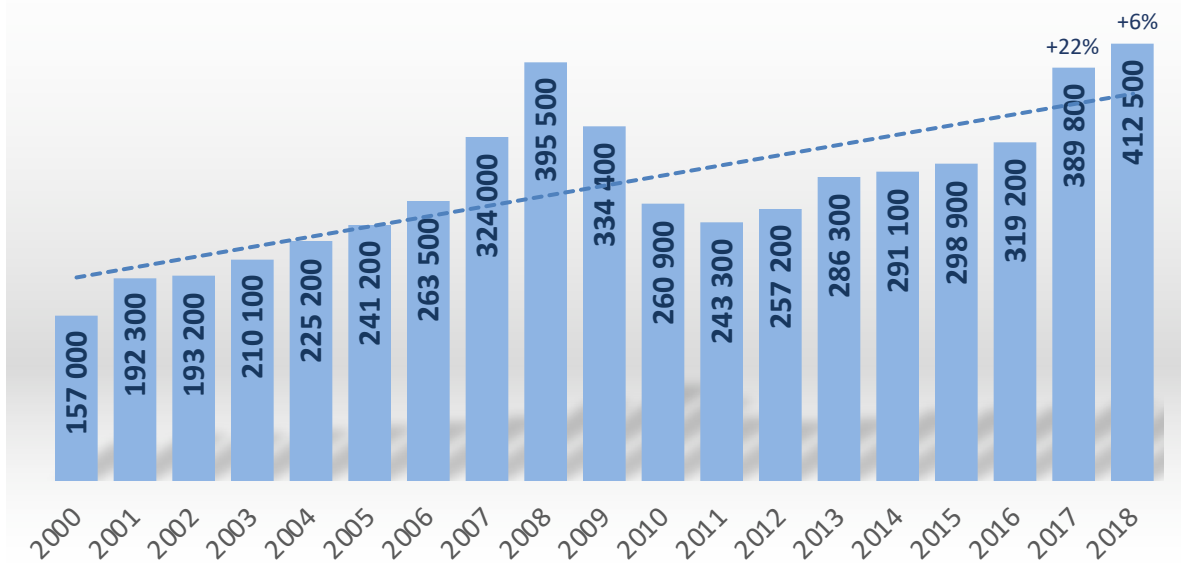
Share of overnights by regions 2018





# Winter and Summer 2018

Registered overnights in winter season (Nov-Apr)  
by British visitors

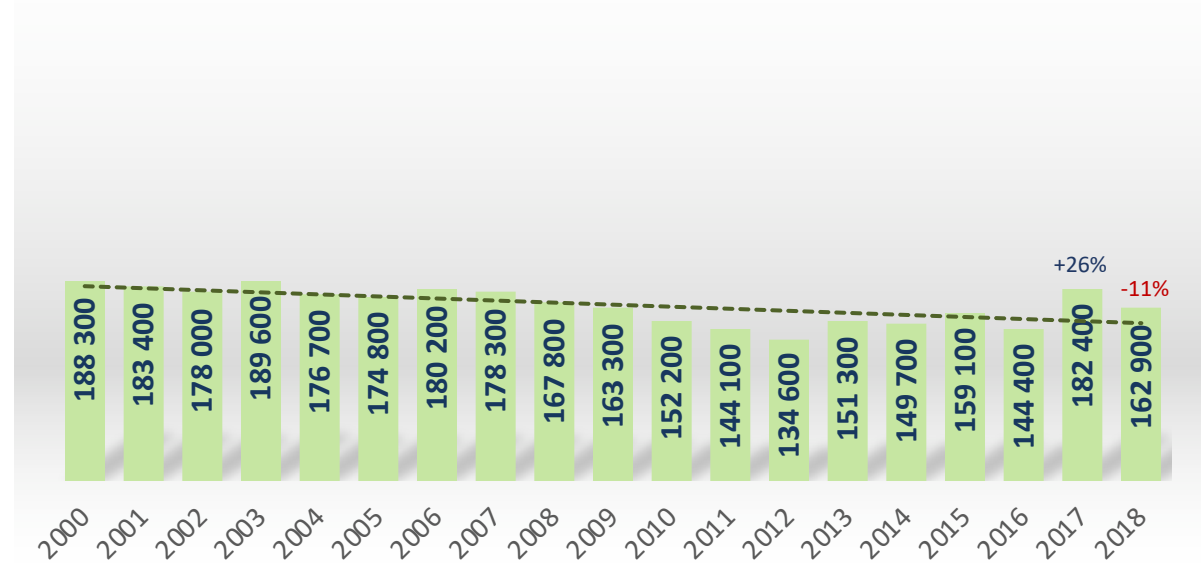


Winter 2018: **2<sup>nd</sup>** in country rankings  
with a **12%** share of foreign overnights

Average change 2000-2018: **+7%**

Change 2018 compared to 2000: **+163%**

Registered overnights in summer season (May-Oct)  
by British visitors



Summer 2018: **6<sup>th</sup>** in country rankings  
with a **6%** share of foreign overnights

Average change 2000-2018: **0%**

Change 2018 compared to 2000: **-13%**



# British overnights in Finland

## Seasonal overnights in 2016 – winter 2019

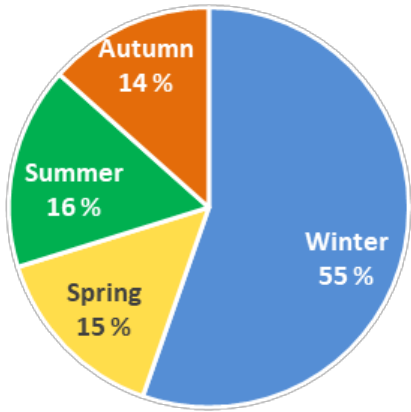


### Whole Finland

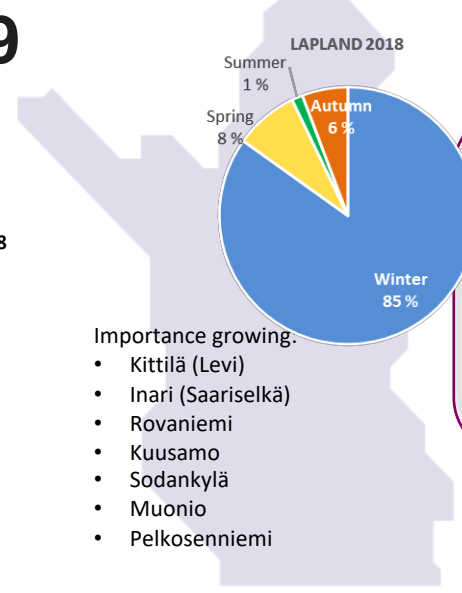
	No. of British overnights				Seasonal YtoY change		
	2016	2017	2018	2019	2017 vs. 2016	2018 vs. 2017	2019 vs. 2018
<b>Winter</b> (Dec-Feb)	242 600	308 700	320 900	336 200	+27%	+4%	+5%
Spring (Mar-May)	72 900	83 600	86 000		+15%	+3%	
<b>Summer</b> (Jun-Aug)	85 800	110 000	95 000		+28%	-14%	
Autumn (Sep-Nov)	61 700	75 900	77 800		+23%	+3%	

### British overnights in Finland by season in 2018

#### WHOLE COUNTRY 2018



### 2018



#### Lapland 2018

Winter18	262 600	+3%
Spring	24 800	+21%
Summer	4 200	+4%
Autumn	17 900	+26%
<b>Winter19</b>	<b>278 300</b>	<b>+6%</b>

- Importance growing:
- Kittilä (Levi)
  - Inari (Saariselkä)
  - Rovaniemi
  - Kuusamo
  - Sodankylä
  - Muonio
  - Pelkosenniemi

#### Lakeland 2018

Winter18	7 600	+20%
Spring	7 000	-6%
Summer	14 900	-19%
Autumn	6 400	-15%
<b>Winter19</b>	<b>7 500</b>	<b>-1%</b>

- Importance growing:
- Kainuu

#### Coast & Archipelago 2018-19

Winter18	9 600	-11%
Spring	9 300	+2%
Summer	14 100	-7%
Autumn	7 700	-16%
<b>Winter19</b>	<b>6 700</b>	<b>-30%</b>

#### Helsinki region 2018

Winter18	41 100	+10%
Spring	45 000	-3%
Summer	61 500	-15%
Autumn	45 800	+2%
<b>Winter19</b>	<b>43 700</b>	<b>+6%</b>

- Importance growing:
- Vantaa



# Trends for seasonal overnights in Finland – British visitors

