

# Market Insights United Kingdom





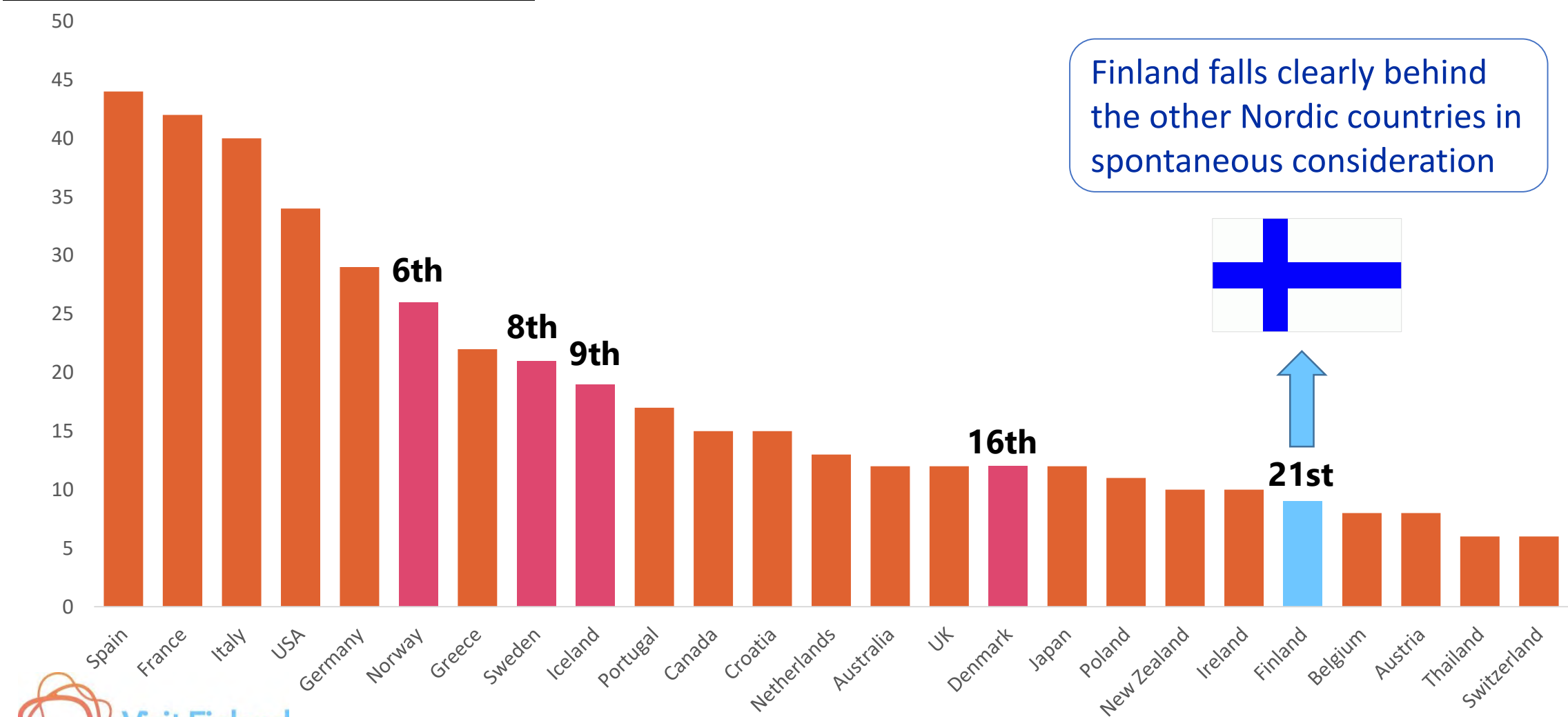
# Finland's image as a travel destination in UK

Brand Tracking survey 2019



When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland falls behind its Nordic competitors and is ranked in 21<sup>st</sup> place.

Spontaneous Destination Consideration



Visit Finland

Q2. SPONTANEOUS CONSIDERATION DESTINATION

Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,200)



## Country Mental Network - Finland

To note: the word 'cold' has been removed from the word clouds, in order to see more detailed associations with Finland



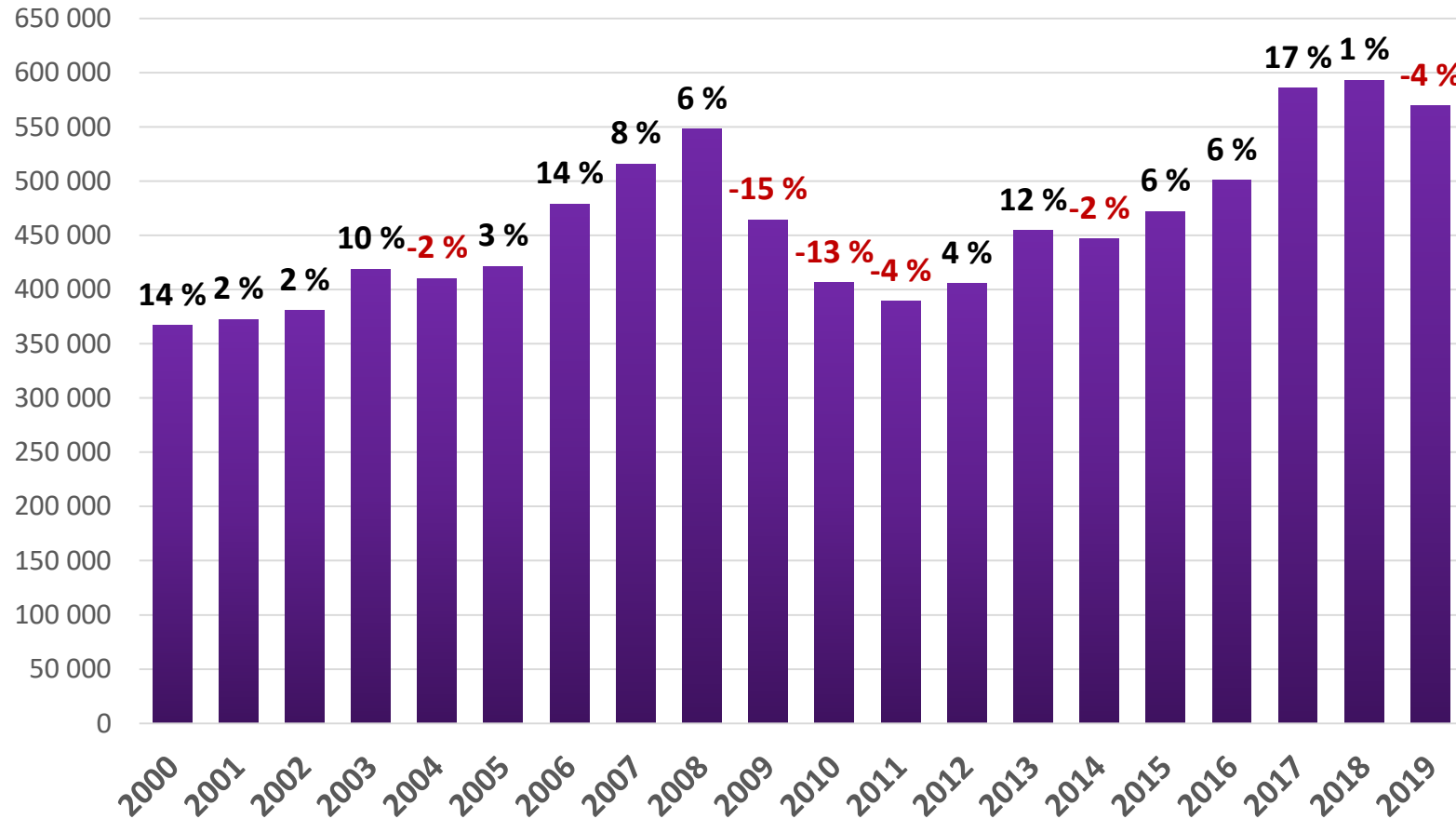
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# BRITISH OVERNIGHTS IN FINLAND AND IN THE NORDICS





# British overnights in Finland (pre-covid19)



## Year 2019

**569 300** overnights in total

**3<sup>rd</sup>** in country rankings  
with a **8% share** of foreign overnights

Average change 2000-2019: **+3%**

Change 2019 compared to 2000: **+55%**

## Share of overnights by regions 2019



**33%**



**7%**

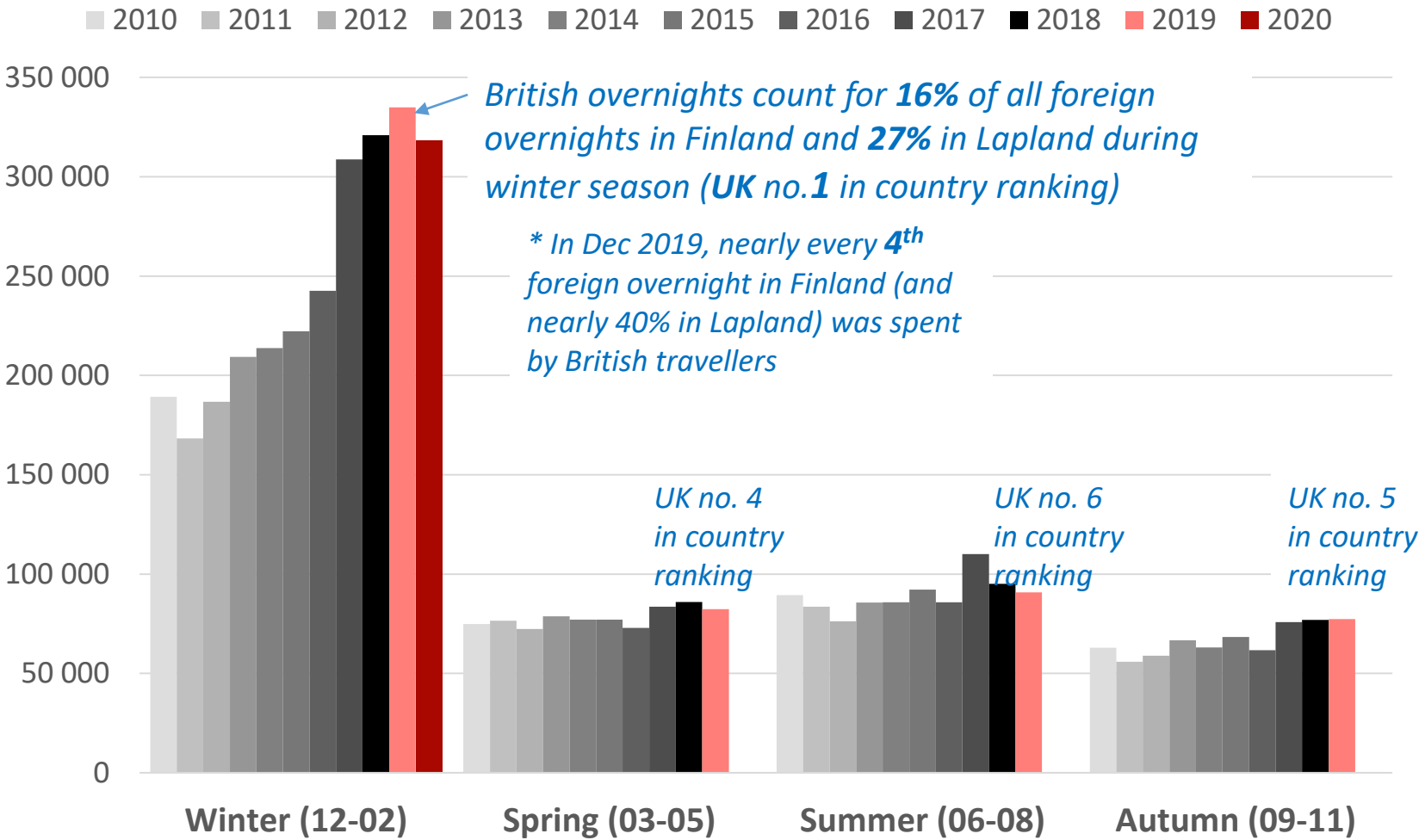


**6%**

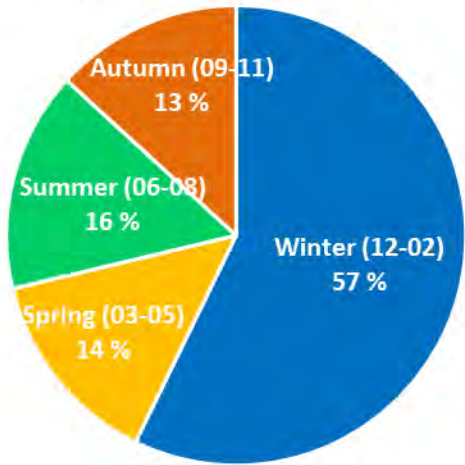


**54%**

# Seasonality of British overnights in Finland (pre-covid19)



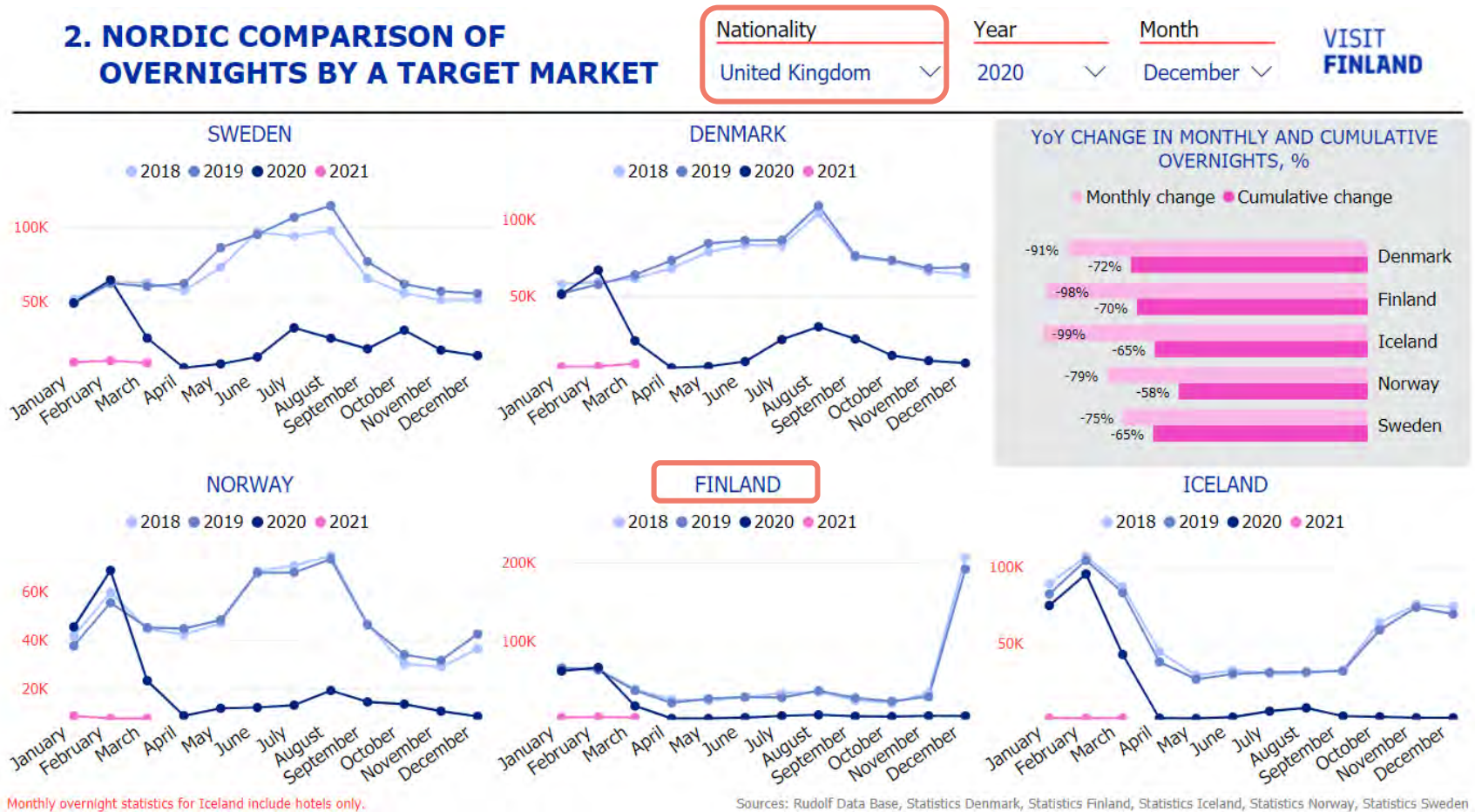
British overnights in 2019



# British overnights in Nordics

## Monthly trend

- **Holidays to Finnish Lapland in December** has clearly been the preferred holiday type for the **Brits** considering trips to the Nordics.
- Beside Finland, also **Iceland and Norway** are popular destinations during the winter months, while Sweden and Denmark are selected more often for the summer.
- **Travel from the UK to Finland, Iceland and Norway** has nearly stopped since April 2020. Sweden with looser travel policy and Denmark with border openings in summer 2020, attracted some British visitors despite the pandemic.
- **Finland's share of the British visitors** among the Nordic countries was **16% in 2019**.

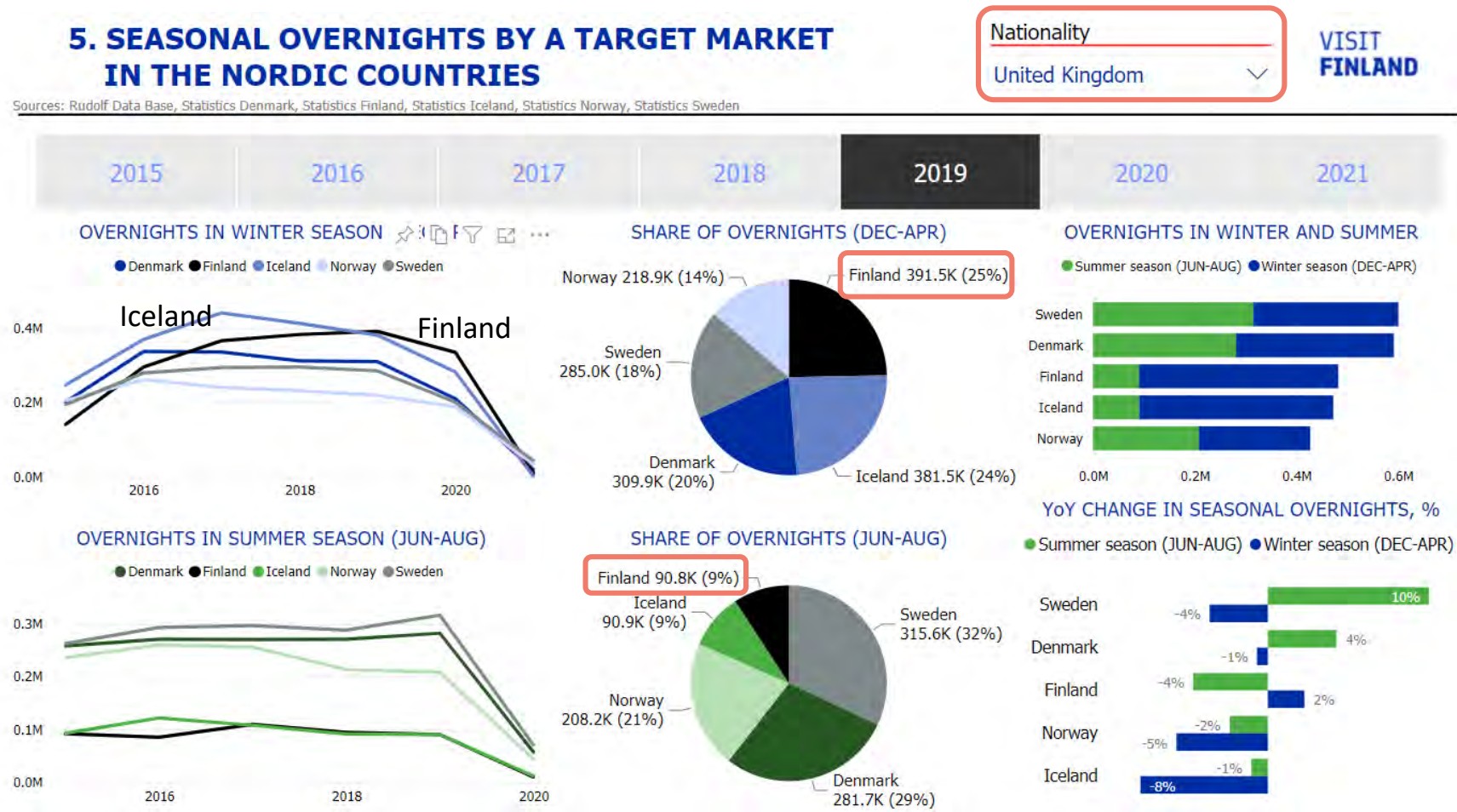




# British overnights in Nordics

## Seasonal trend

- **Finland surpassed Iceland in 2019** as the first choice for the winter holidays among the Nordics (Finland's market share was 25%)
- **More than 80% of Brits** visiting Finland in winter travel to **Lapland**
- During the **summer season**, **Sweden and Denmark** are the most popular destinations among the Nordics for the British visitors
- **Finland's share in the summer season 2019 was only 9%** of the British overnights in the Nordics
- **Travel from the UK to Finland in the winter and to Sweden and Denmark in summer was on the rise pre-covid**





# DIGITAL DEMAND 2020

TOURISM-RELATED INTERNET  
SEARCHES ABOUT FINLAND






# UK is #5 market by the volume of tourism-related searches about Finland

All together  
4,8 million international searches  
(-12% compared to 2019)

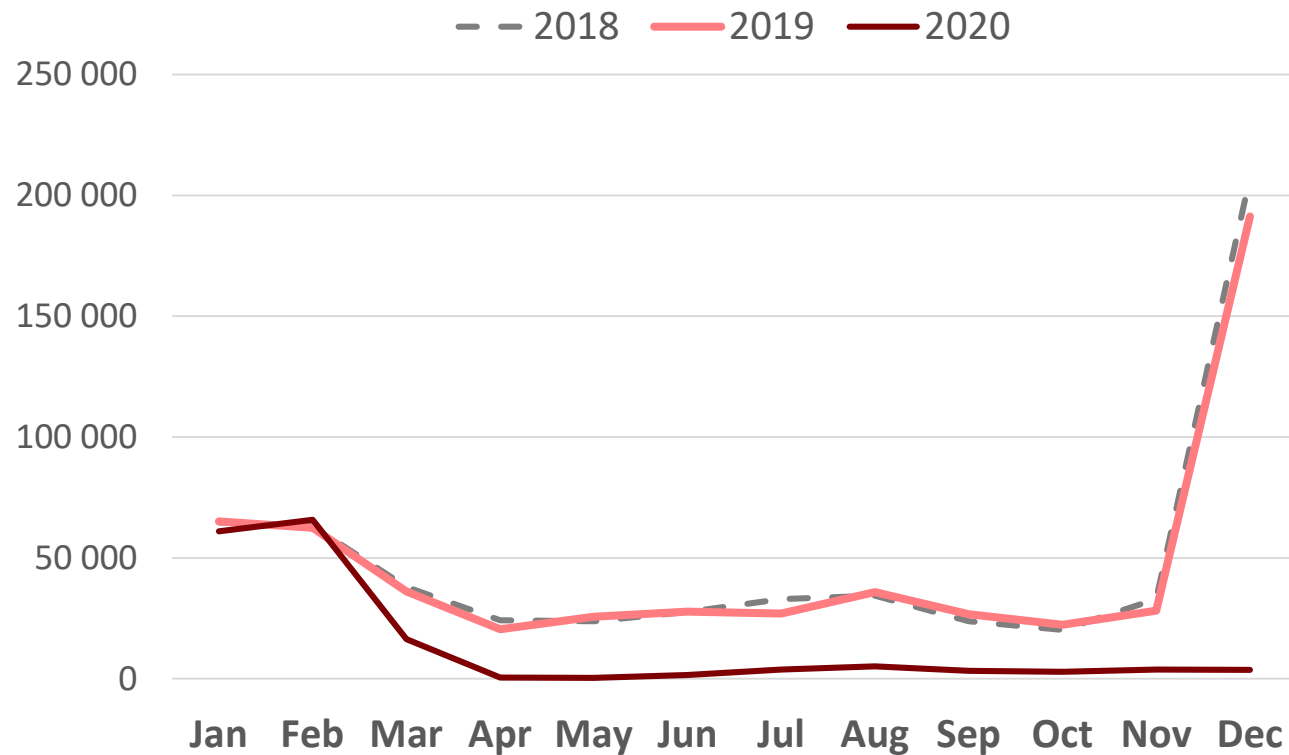
Source: [Digital Demand /Visit Finland 2021](#)

## Target Market Distribution

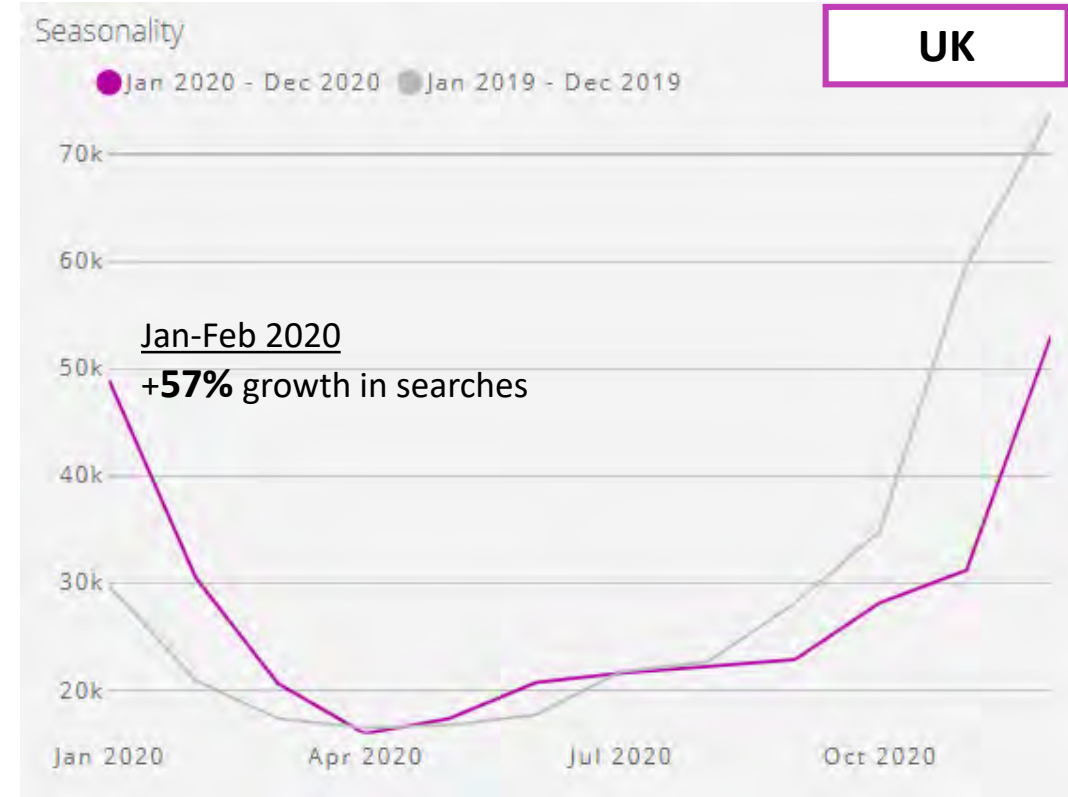
Rank	Flag	Country	Searches	Growth
1		Japan	488,824	-13.3%
2		Germany	480,439	-3.5%
3		United States	457,516	5.4%
4		Russia	347,434	-36.5%
5		United Kingdom	333,867	-7.3%
6		France	205,467	-17.8%
7		China	201,482	-63.3%
8		Spain	182,232	-11.3%
9		Netherlands	180,535	24.8%
10		India	171,296	5.7%
11		Estonia	136,670	19.4%
12		Sweden	128,918	-3.2%
13		Switzerland	108,984	-10.0%
14		Norway	74,032	14.6%
15		Denmark	54,076	-1.4%

# TRAVEL AND SEARCHES FROM UK

## British overnights in Finland



## Travel related searches for Finland

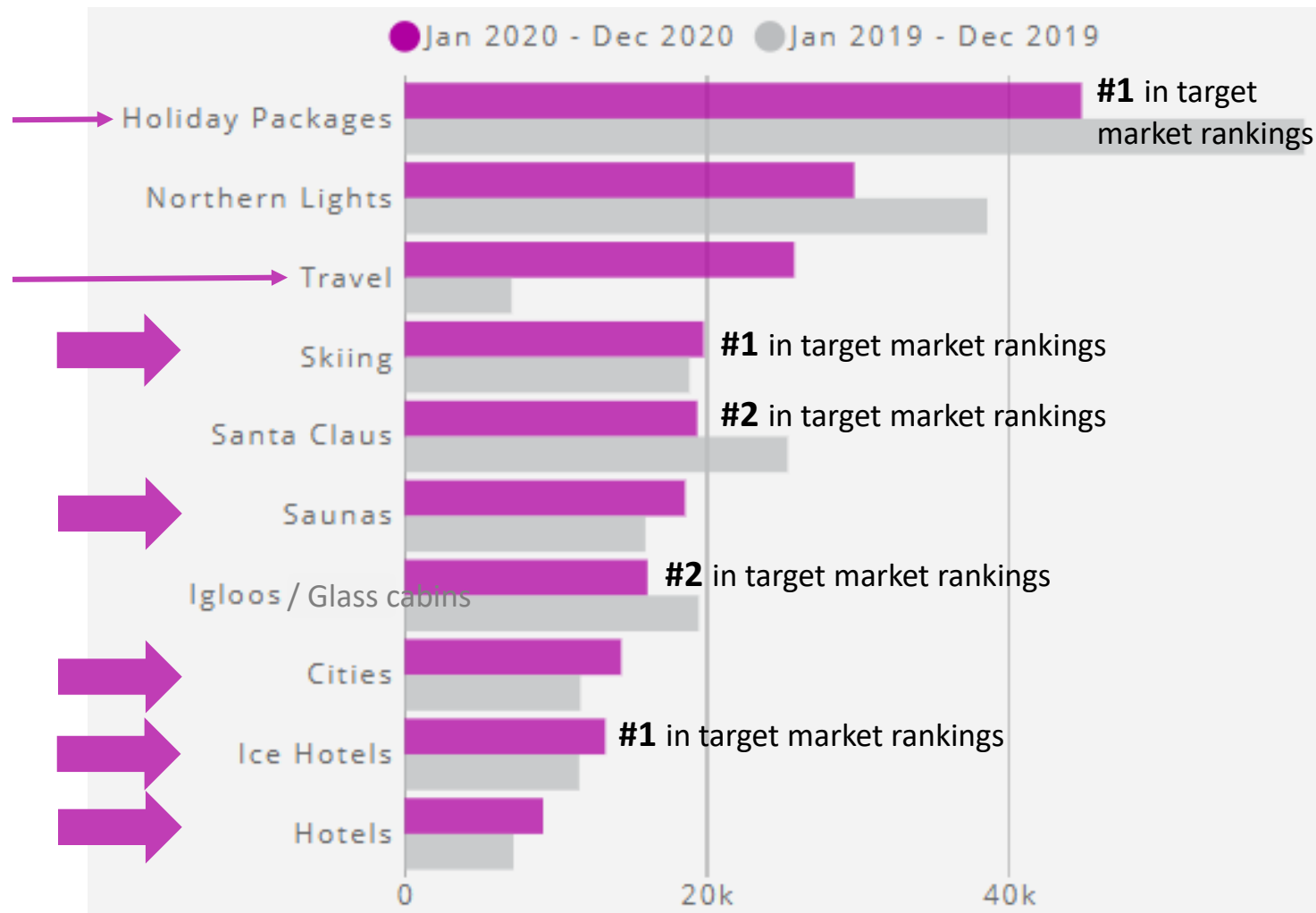


- British overnights concentrate heavily on December, and searches on winter
- British overnights decreased in 2020 compared to 2019 by **70%**, while searches decreased only slightly, by **7%**





# UK: Most searched topics in 2020: Top 10 micro brandtags



- Britons are the most active among the VF target market travel enthusiast in searching for **Holiday Packages, Skiing** and **Ice Hotels** in Finland.
- Searches for **Travel** increased the most. On the activity side searches for **Skiing, Saunas, Cities, Ice Hotels** and **Hotels** increased during 2020 compared to 2019.

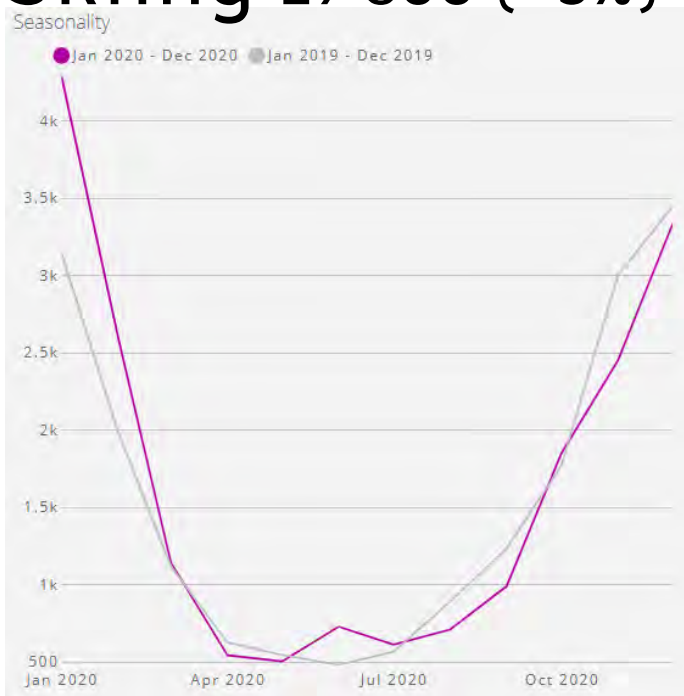
	UK's ranking	YtoY change for UK
<b>Holiday Packages</b>	1.	-25%
Northern lights	4.	-23%
Travel	6.	+265%
<b>Skiing</b>	1.	+5%
<b>Santa Claus</b>	2.	-24%
Saunas	6.	+17%
<b>Igloos/Glass cabins</b>	2.	-15%
Cities	7.	+23%
<b>Ice Hotels</b>	1.	+15%
<b>Hotels</b>	3.	+27%

# UK

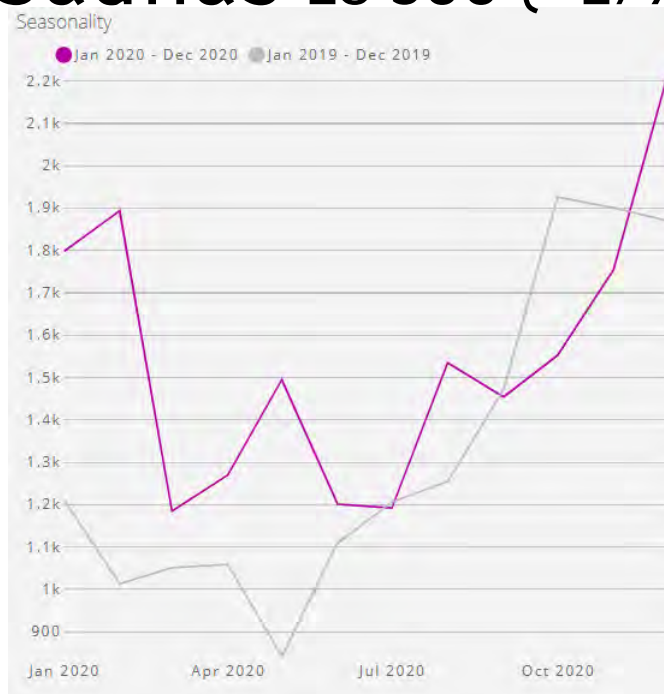
## TOP 3 MICRO BRANDTAGS WITH INTEREST GROWING IN 2020

- Searches on **Skiing in Finland** increased in the UK especially in the beginning of the year. In global searches, Norway clearly leads the way in the Nordics and also Sweden stays clearly ahead of Finland, so this activity could be promoted even more.
- Interest towards **Saunas** has increased both globally and in the UK. Finland is also clearly in the lead position among the Nordic countries with the searches for saunas.
- Travel related searches for **Cities** in Finland increased last year in the UK. In addition, the global searches for cities increased for each of the Nordic countries, so there seems to be some good potential for smaller cities as holiday destinations in the near future.

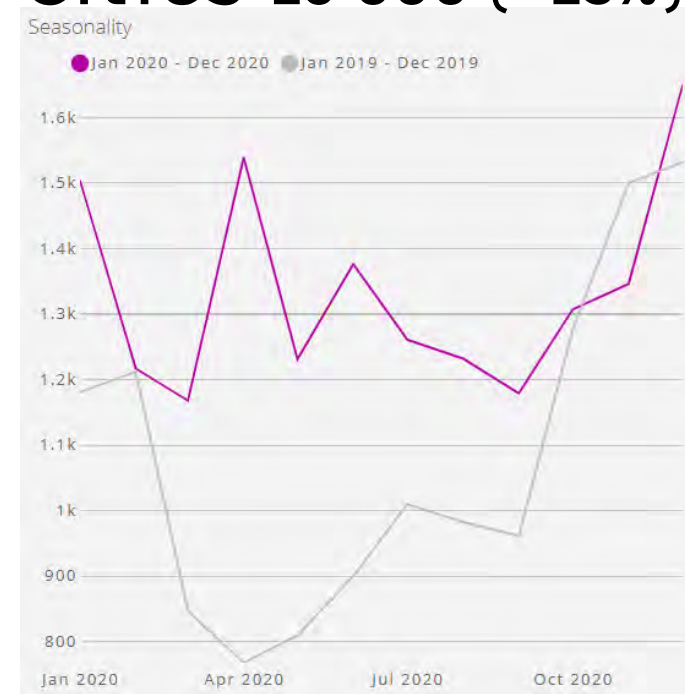
### Skiing 19 800 (+5%)



### Saunas 18 500 (+17%)



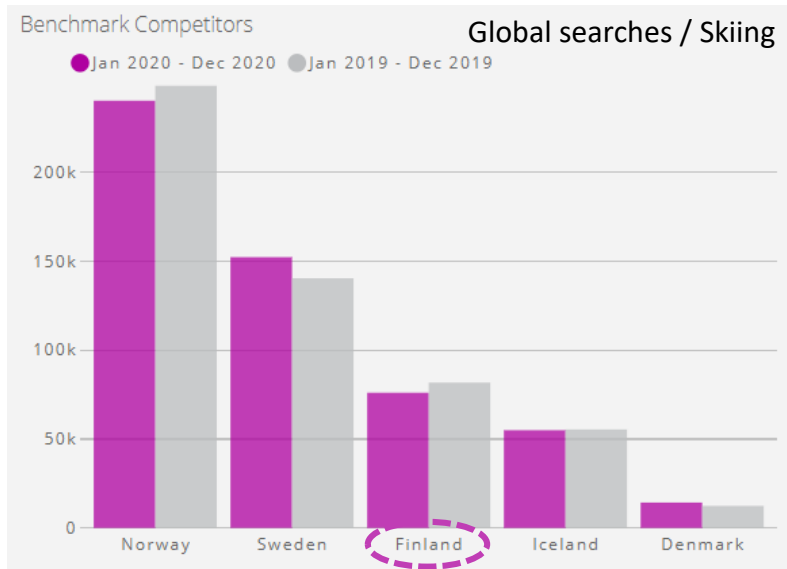
### Cities 16 000 (+23%)





# Skiing:

Finland stays far behind Norway and Sweden in the global searches for skiing – **UK #1** market for Finland

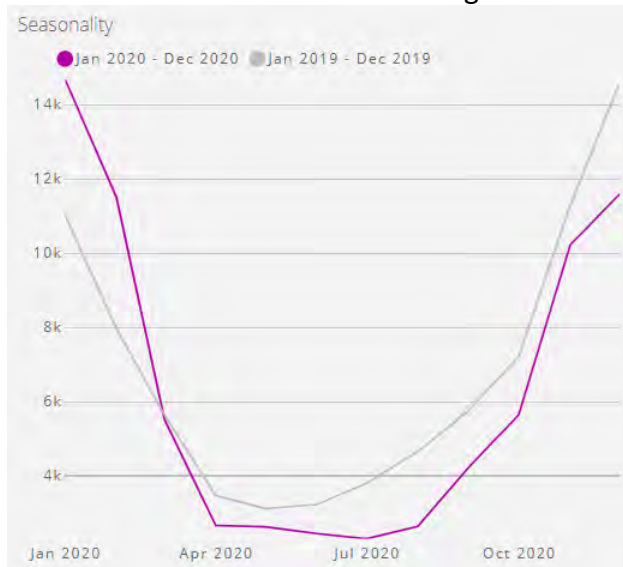


## Travel-related searches on Skiing for Finland in 2020

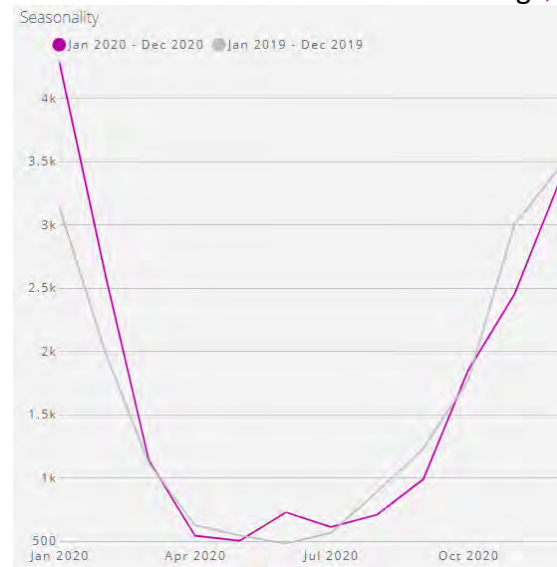
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		United Kingdom	19,771	5.0%
2		Germany	10,508	30.6%
3		United States	4,752	22.4%
4		Netherlands	4,366	-2.4%
5		France	4,363	11.9%
6		China	3,470	-74.4%
7		Latvia	2,931	52.4%
8		Denmark	2,700	-3.2%
9		Switzerland	2,529	5.3%
10		Sweden	2,393	1.4%

### FINLAND: Global searches for Skiing

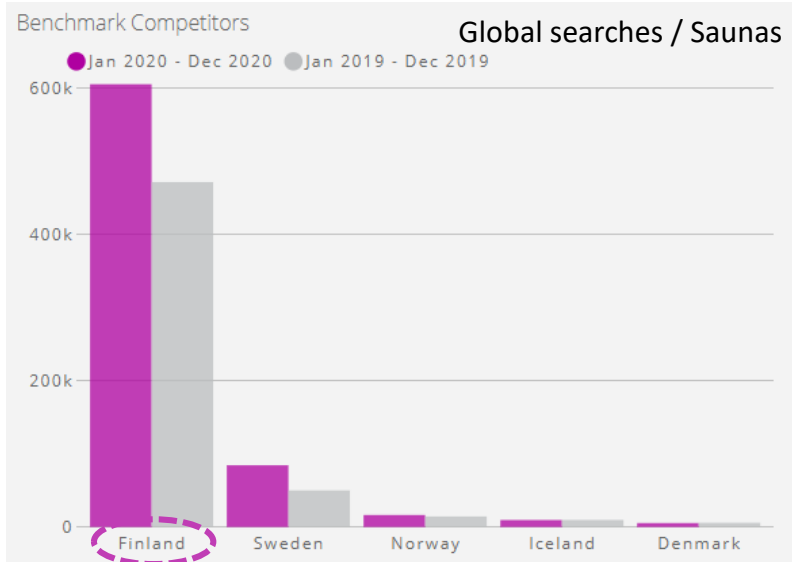


### FINLAND: British searches for Skiing



# Saunas:

Finland clearly the leader in global searches with good growth during the whole year 2020

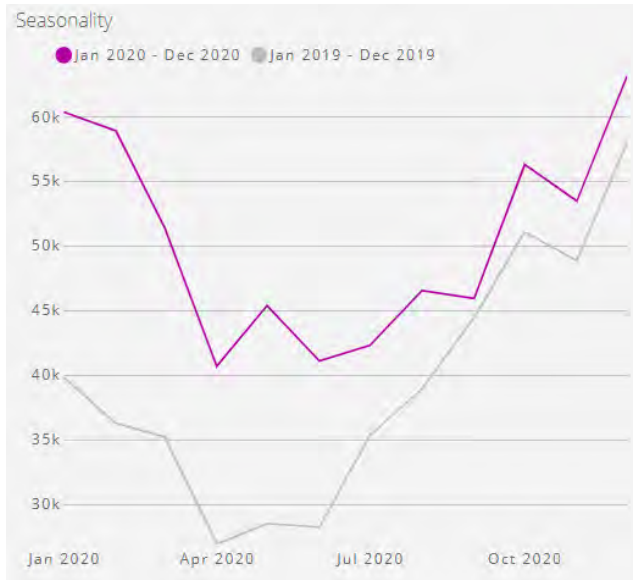


Travel-related searches on Saunas for Finland in 2020

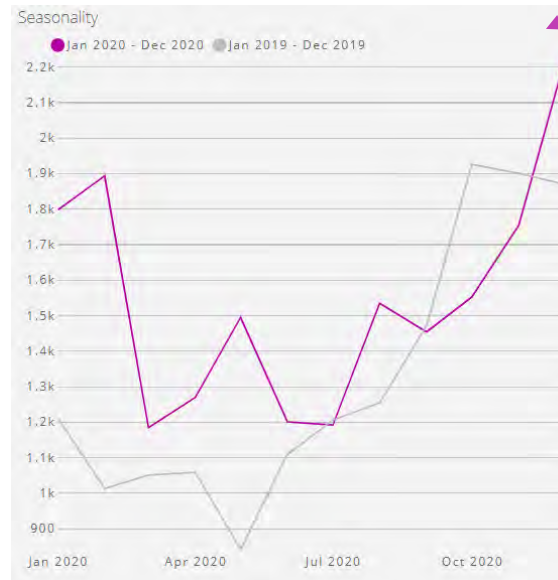
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	112,303	43.3%
2		United States	92,557	35.4%
3		Germany	56,300	17.5%
4		Netherlands	34,080	44.3%
5		France	19,801	-1.7%
6		United Kingdom	18,545	16.5%
7		Spain	18,160	5.6%
8		South Korea	13,980	114.7%
9		Switzerland	9,234	20.8%
10		Russia	8,938	12.8%

FINLAND: Global searches for Saunas growing



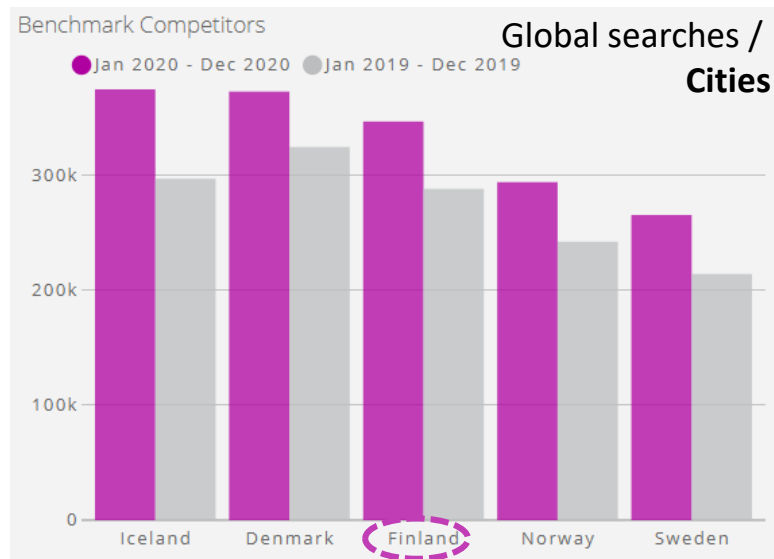
FINLAND: British searches for Saunas



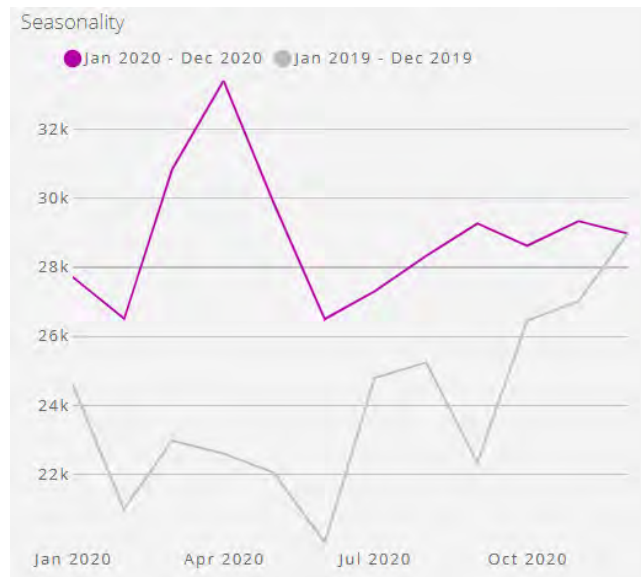


# Cities:

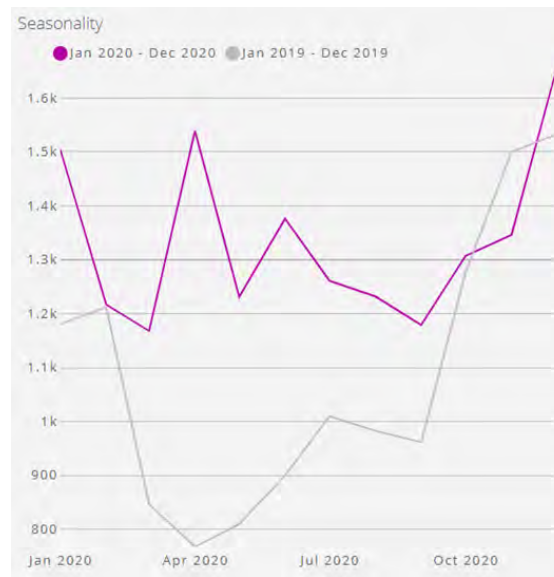
Nordic Cities equally interesting and searches increasing for each country in 2020



FINLAND: Global searches for Cities



FINLAND: British searches for Cities



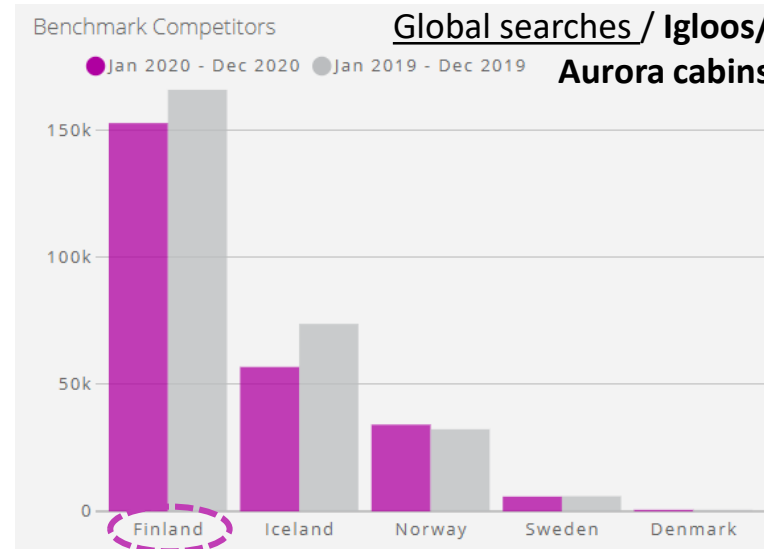
Travel-related searches on Cities for Finland in 2020

Target Market Distribution

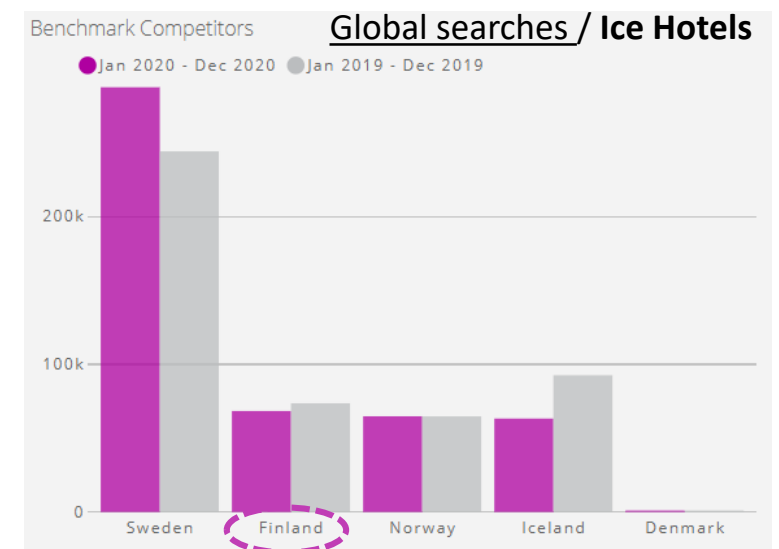
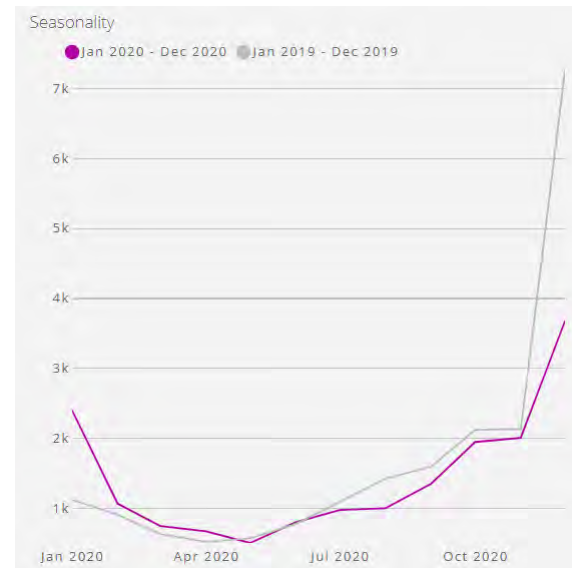
Rank	Flag	Country	Searches	Growth
1		Estonia	46,084	44.2%
2		United States	36,646	18.7%
3		Germany	24,632	9.3%
4		India	19,132	45.0%
5		Sweden	16,635	22.7%
6		France	16,413	-18.3%
7		United Kingdom	16,009	23.3%
8		Spain	10,741	12.8%
9		Norway	8,099	61.3%
10		Russia	5,130	-34.7%

# Igloos/Glass cabins/Aurora cabins vs. Ice Hotels

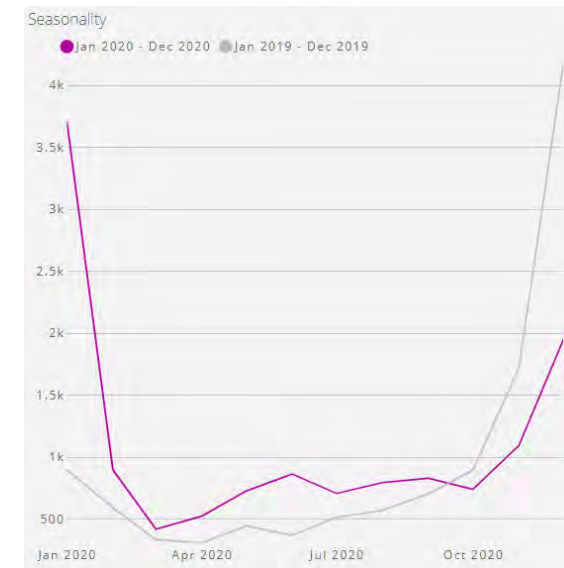
Finland is clearly the leader in global searches for Glass/Aurora cabins, while Sweden is in the lead position for Ice Hotels.



FINLAND: British searches for Aurora/glass cabins



FINLAND: British searches for Ice Hotels





# OUTLOOK ON TRAVEL SENTIMENT AND TRENDS





# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## UNITED KINGDOM

Britons' sentiment greatly deteriorates in light of UK government advice against non-essential international travel\*

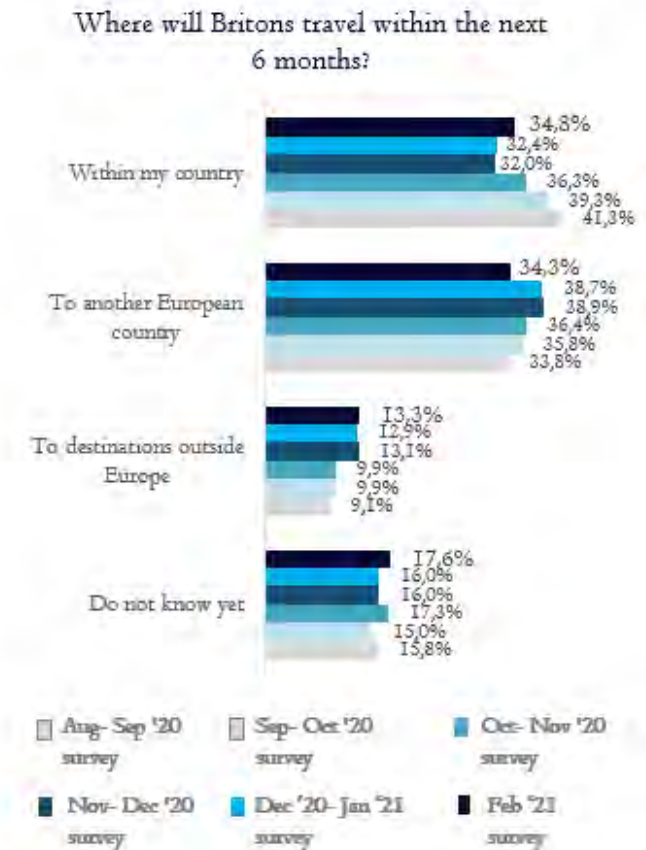
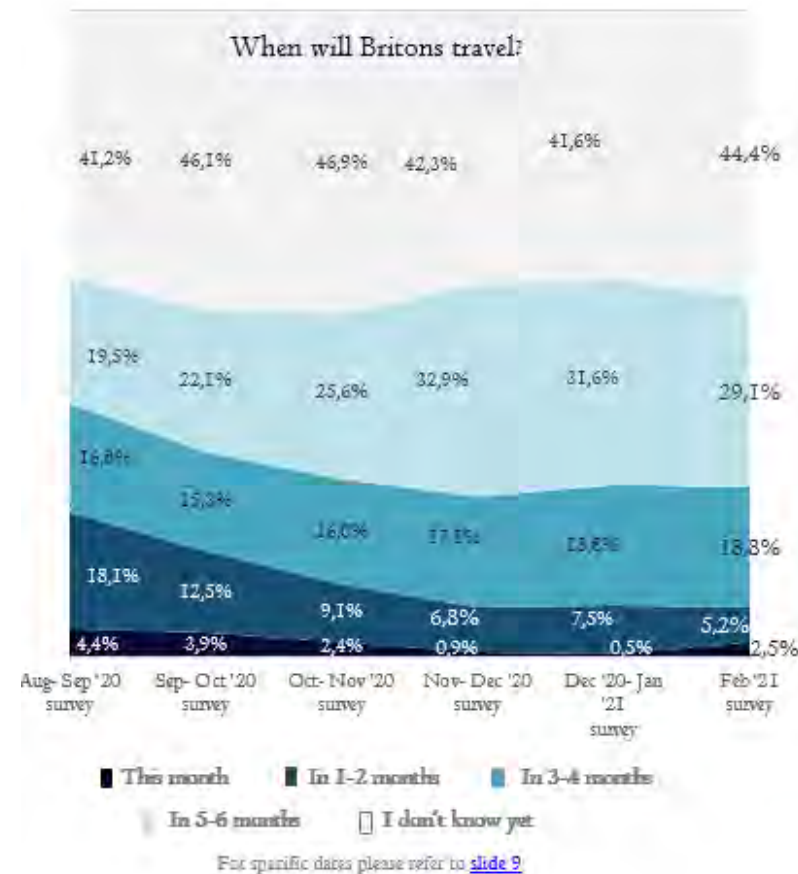


No. of respondents: 750

According to the survey conducted in February 2021

- **42% of the Britons** responded that they are likely to travel within the next 6 months
- **29% were looking at July and August** for their next vacations
- **34% aim to travel to another European country** and 35% to remain within their domestic borders

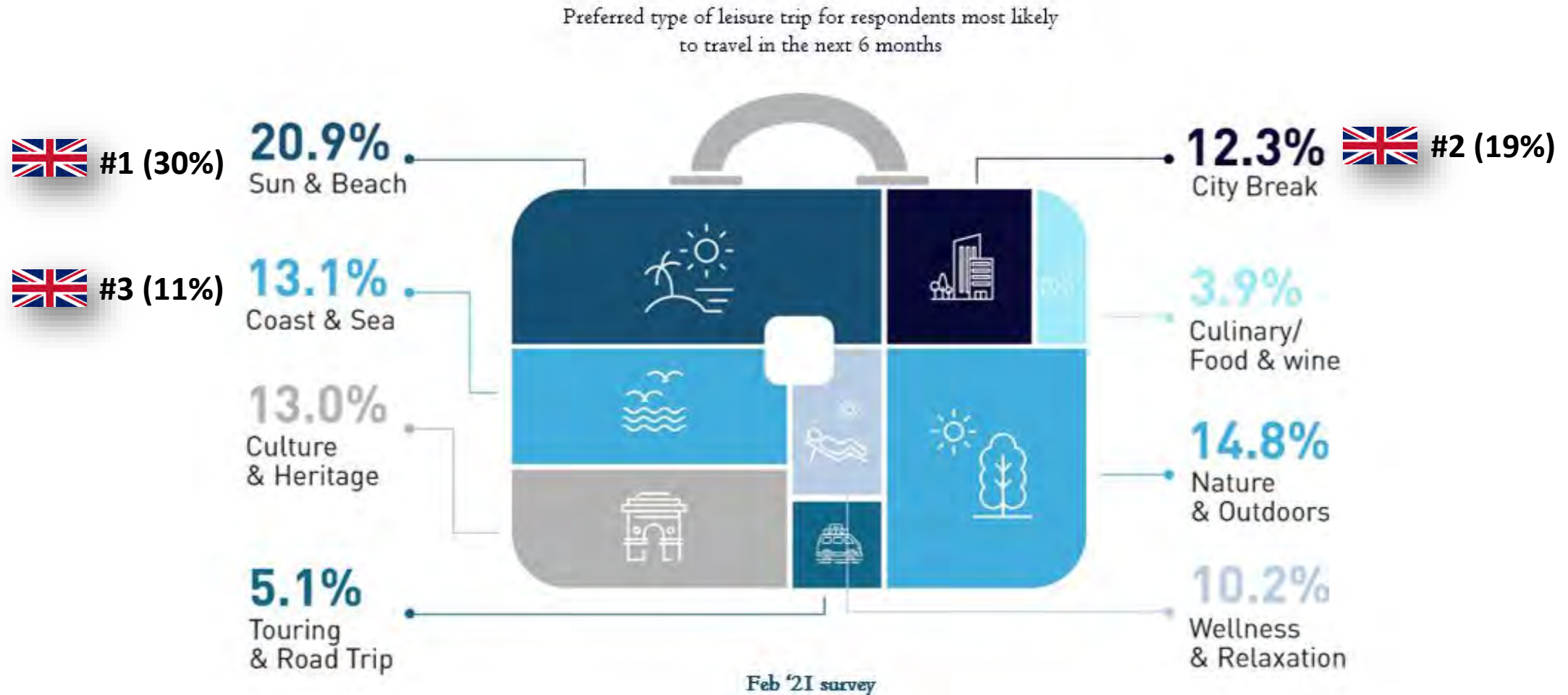
\*The survey was conducted before the roadmap for lifting UK lockdown was announced





# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## Preferred type of leisure trips during March-August 2021



Wave 6 data collected: 5.-19. February 2021; sample= 5,837

Countries included: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria

# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## Travel qualities sought by consumers at the moment



Countries included: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria



# WHAT HAS CHANGED?

## CHANGES IN TRAVELLER BEHAVIOUR IN TIMES OF COVID-19

-short-lived trends or here to stay?-

### Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for '*staycations*' or vacations close to home.

### Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.

### Younger travellers most resilient

#### Change in demographics:

travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.

### New concerns

Health & Safety measures and cancellation policies are consumers' main concerns.

### Last minute

Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.

### More responsible

#### Sustainability, authenticity and localhood:

travellers have been giving more importance to creating a positive impact on local communities, increasing looking for authenticity





# Europe & USA future trends

## Workation VF

● Strengthening | 2020–2028  
Crowdsourced: 2022.72

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Both working and studying over the internet are continuously increasing in popularity. This trend has led to workations during which the traveller does remote work in the destination. It is believed that if workations become more common, the stays in destinations will also become longer. The boundaries between work-related travel and leisure are becoming vaguer as the digital nomads increase in numbers. Finland has great potential to serve the needs of workationers with excellent internet connectivity, great outdoors and accommodation as well as the atmosphere of the happiest country in the world with high quality of life.



"One Happy Workation": Your office in paradise, Aruba



## Overland Travel & Touring VF

● Strengthening | 2021–2024  
Crowdsourced: 2020.8

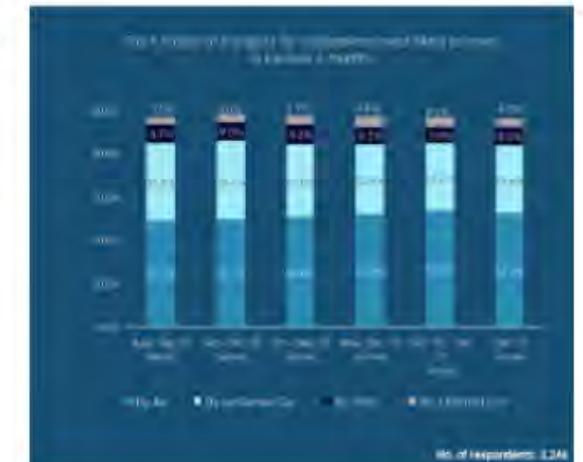
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Health concerns and travel restrictions have grown the interest in travelling by land, especially by car or camper van. Driving tours and road trips have become more common and have been regarded as safer and more enjoyable than before. It is anticipated that camper vans will be popular especially among the families with children who want to practice social distancing. Travelling by train or bus has also been promoted as mode of transportation after the pandemic and has to do with travelling to close-by destinations and making responsible choices.

On the other hand, there are signs that air travel would gain more popularity over car travel again, at least among the early bird travellers, as slightly growing proportion of Europeans have said they'd prefer travelling by air (see image, ETC 2021). In the longer term, overland travel including touring by car, camper van, train, bus or bike, is expected to remain a more familiar way of travelling around within the destination as well, possibly more so than before.

Monitoring Sentiment for Domestic and Intra-European Travel, wave 6. European Travel Commission (ETC) 2021, pp. 41.

Although more than half of early bird travellers plan to fly for their next trip, others (33%) are now slightly more reluctant.



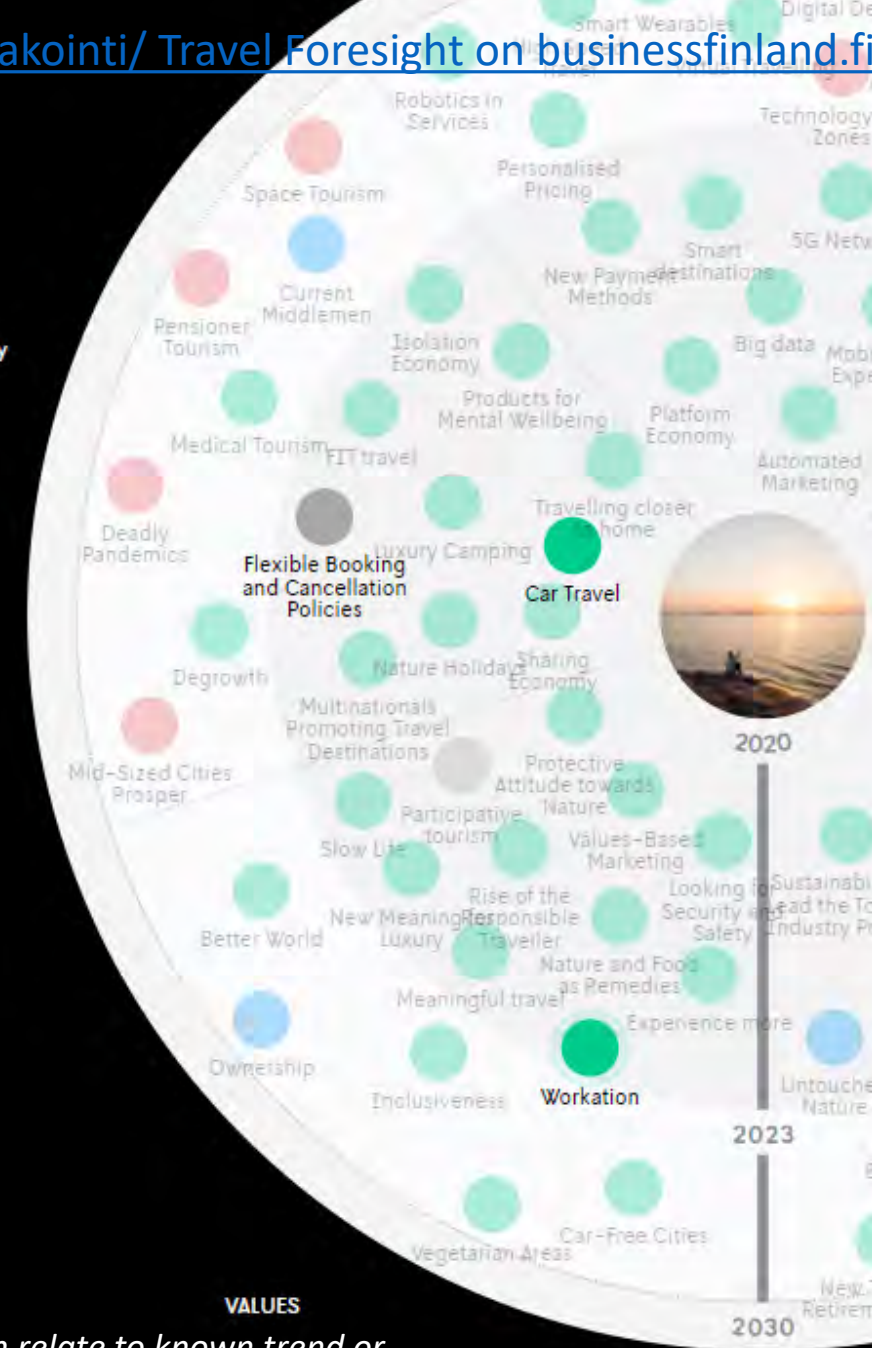


# Europe & USA future change signals

Weak signals of change affecting travel in Europe & USA

- FLEXIBLE BOOKING AND CANCELLATION POLICIES
- HEALING TRAVEL
- COTTAGE HOLIDAYS
- VIDEO AS MEDIUM FOR MARKETING

ECONOMY









**Weak signals** are smaller change phenomena, often single cases or observations of our time, that can relate to known trend or be a signal of something new, still emerging and uncertain change. In time, these signals might turn into trends or fade out.



# Strengthening travel motivations for nature-oriented travellers

## Hot Trending Consumer Motivations for Adventure Travel



-  1. New Experiences
-  2. Go Off the Beaten Track
-  3. To Travel Like a Local
-  4. Cultural Encounters
-  5. Wellness/Betterment Goals
-  6. Last Chance Travel

**Q13:** What is your organization's perception of the following consumer motivations, based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I

# Trending trip types for nature-oriented travellers

## “Hot” Trending High-Demand Trips



1. Custom Itineraries
2. Greener/Sustainable/Low Impact Itineraries
3. Electric Bike Itineraries
4. Expert or Specialist-Guided Trips
5. Remote Destinations/Trails
6. Wellness and Mindfulness Itineraries
7. Self-Guides

**Q12:** What is your organization's perception of the following itinerary trends based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I





Visit Finland