



VF United Kingdom Market Report
November 2019

Visit Finland Country Representative

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Semiannual Report – UNITED KINGDOM

Summer season 2019 and outlook for winter 2019-20

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Factors affecting the results of the summer season 2019

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

- June remained the same, however July was -18%, a big drop! August up 3%
- September was up 10%, a good increase
- Summer headlines - ongoing political uncertainty with failed Brexit deals and media was scare mongering travellers about no deal scenario and heightened security at airports
- ABTA's research found almost two thirds of people took a foreign holiday in the 12 months to July 2019, increase of 4% from last year, however people are conscious of price and cut back on spend before and while they are away
- Consumer confidence knocked, so people choosing cheaper destinations like Spain, Bulgaria, Slovenia over Nordic countries, Norway and Sweden down on Summer figures too.
- Iceland suffered a massive blow with WOW airlines going into bankruptcy and the figures down greatly most of the winter to Summer
- Euro sank to an all time low to further deter travellers with the higher priced countries
- City breaks remains strong with over 46% Brits opting for a weekend away, Multi trip is up 15%, Lakes and Mountains up 11%. Active holidays are up – all of this could have helped September figures
- 42% of Brits booked their holiday directly with the service provider such as hotel or airline
- 55% have stayed in a four star accommodation over the last 12 months, which makes the luxury traveller segment strong for Finland

Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

Changes in demand

- Consumer confidence still low due to Brexit and media scare mongering
- Cheaper countries more attractive like Bulgaria and Montenegro
- Cities and active travel could have boosted Finland

Finland's image as a travel destination

- Image still perceived as winter destination
- Autumn Lapland getting stronger thanks to the PR and marketing around the outdoor activities and Autumn auroras
- Still there needs to be some big consumer brand awareness for peak Summer Jun-July

Changes in distribution

- Changes in accessibility
- Finnair operating 21% more flight capacity from London Heathrow
- Wizz air started flying direct from Luton to Turku from June 2019

Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

Products that have been attractive

- City breaks
- Multi centre
- Fly-drives
- Bears with Wild Taiga and Kuusamo (Explore saw an increase in their bear weekends)
- Autumn Auroras
- Cultural tours like Alvar Aalto, Savolinna and Winter war themes have sold out

Regions that have been attractive

- Helsinki region combined with Espoo, Porvoo, Lahti
- Lakeland Western and Eastern
- Ruka Kuusamo
- Autumn Lapland

Campaigns, joint promotions results

- Magnetic North Travel – Deep sleep campaign Lakeland and Helsinki regions
- Best Served Scandinavia Summer campaign Turku, Archipelago, Helsinki region, Lakeland and Autumn Rovaniemi - Summer was up 140% with increase of 35% in Finland overall

Outlook for the coming winter season 2019-20

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

Increase/decrease and reasons for the increase/decrease

- Decrease Thomas Cook going into administration with approx. 12k seats to account for (TO's finding alternative options)
- Increase from new Operators
- Good snow in Finland and great demand last minute for Lapland
- Operators reporting the family market coming back

New winter products

- Octola has been very popular with luxury operators

New sales channels

- Headwater Ski programme in Ylläs
- Traifinders new product in Rovaniemi
- Inghams new premium FIT programme in Inari-Saariselkä Star Arctic and Muotka
- Sunvil new product Lapland

Outlook for the coming winter season 2019-20

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

What are the trends for the winter 2019-20?

- Ski is looking to do better this year
- Europe is set to be still high for Brits to travel to
- Last minute bookings

Which are the traveller segments?

- Comfort seekers (luxury market) that are not affected by Brexit
- Responsible travellers
- Family market
- Skiers

Outlook for the summer season 2020

Ad hoc marketing opportunities

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

- **Matka** - Jan
- **Five Countries Workshop** - Feb
- **Sustainable Finland Travel Launch UK** – March
- **Luxury trade shows to attract new audience** TBC
- **Event workshop Manchester & London UK** – June
- **Summer FAM's** – Luxury, Adventure, Culture/City - TBC

- **TripAdvisor** Culture, Food, luxury marketing campaign Jan-Feb
- **Nature campaign** with Sportspursuit and Outdoors Enthusiast filming Autumn this year, coverage Spring time 2020
- **Best Served Scandinavia Campaign** with Hays Travel and TTG to promote Sustainable Summer Tourism
- **Barrhead Travel** – social media, eshot, discover full page, window displays in Scotland and Southampton
- **Other JMA's** - TBC mainly arounds luxury and Sustainability themes
- **Rent a Finn 2.0**
- **Visit Finland Improved Summer, luxury images and video**

Prospects for the autumn/winter season 2020

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
- Outstanding accommodation
- Authentic experiences
- Sustainable tourism

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

- Solos
- Families

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

- Wellness
- Educational adventure trips

Theme check: Food tourism

What kind of demand or potential you find in the market you represent?

1. What is "in" on your market in food tourism? Is food important for travelers on your market?

- Good quality, fresh and healthy food, sustainable, foraging

2. Is there any specialized tour operators for food tourism? Are "general" tour operators promoting food experiences?

- Cloudberry Journeys have group tours that want to offer immersive experiences, Imaginative Traveller On The Go Tours, Responsible Travel

3. What kind of food tourism offerings should be developed more in Finland? *E.g. food related activities in nature (like foraging/picnic in a forest), cooking classes (like baking Karelian pies), food walks, home dining, food producers tours, local/Finnish restaurants, beverage tours/tastings, sustainable food, food routes etc.?*

- The cooking classes will be popular for UK market, home dining, tours and tastings at breweries or distilleries

4. The best benchmark and examples (destinations or products)?

- <http://www.expressionsholidays.co.uk/Featured-Holidays/Michelin-restaurant-stays-in-France/>
- <https://walksineurope.com/cities/tallinn-walking-tours/tallinn-sauna-culture-and-brewery-tour/>
- <https://www.tourradar.com/t/133150#p=13>
- <https://www.golearnto.com/course/overview/2312/art+holiday+-+painting%2C+drawing%2C+photography+and+food>

Trends and other relevant travel related topics

Trends

Any new travel trends on your market? What's hot now on your market (BtoC and/or BtoB)

- Multi city
- Retreat holidays
- Affordable Luxury Traveller
- All inclusive looking set to increase for 2020

New distribution channels

- Luxury – new business with Operators and work with luxury media for brand awareness

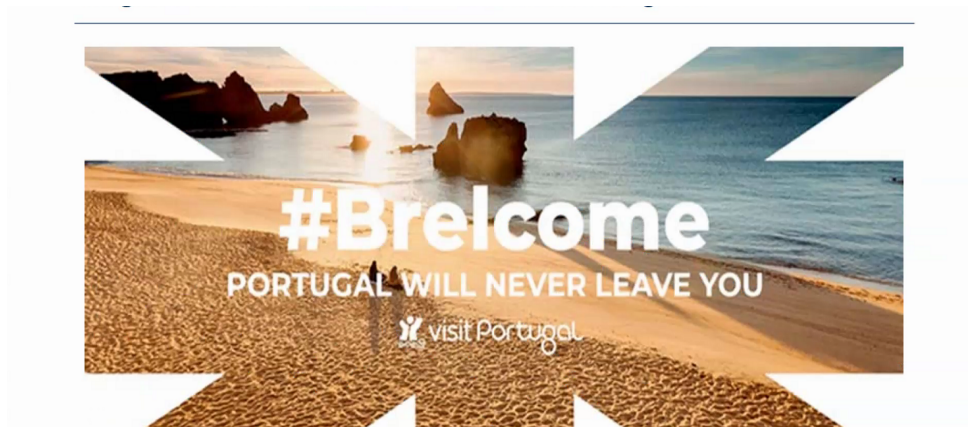
Online Channels

- More TV shows like The Apprentice – high viewing figures, online BBC iplayer repeats - country branding
- TripAdvisor – Jan and Feb 2020 marketing

Trends and other relevant travel related topics

Competitors' actions

- Which countries have been active, where have you seen their promotion, what was the main message/content of the communication, competitors' new products or activities with tour operators/sales channels



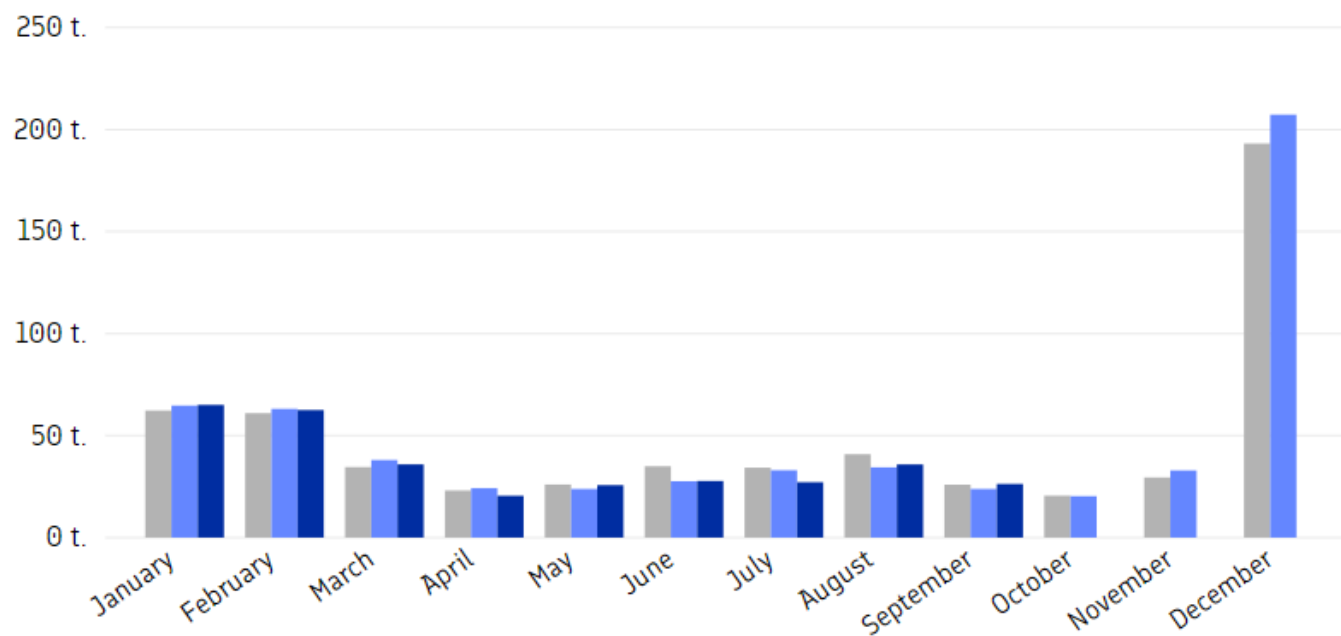
- Portugal's ad campaign to attract tourists during Brexit – see picture
- Florida is advertising on TV, Ad's travel trade partnered with Virgin Holidays
- Hurtigruten aggressive campaign radio, ad's
- River Cruises sponsoring TV programmes – attracting older audience
- Sri Lanka are making their comeback with key sponsors of WTM
- Costa Rica and Iceland with a sustainable message and pledge

UK – Market Review

British overnights in Finland

MONTHLY NIGHTS SPENT IN FINLAND

● 2017 ● 2018 ● 2019



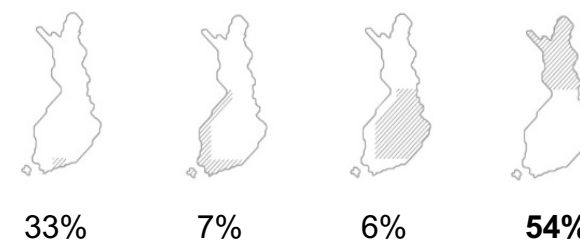
Year 2018

3rd in country rankings
with a **9% share** of foreign overnights

Average change 2000-2018: **+4%**

Change 2018 compared to 2000: **+62%**

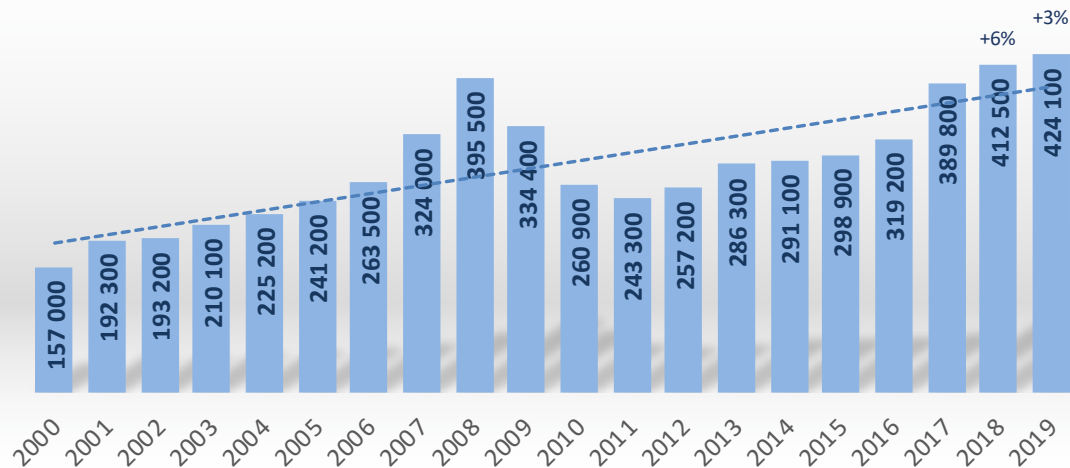
Share of overnights by regions 2018



British overnights in Finland

Winter 2019 and Summer 2018

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

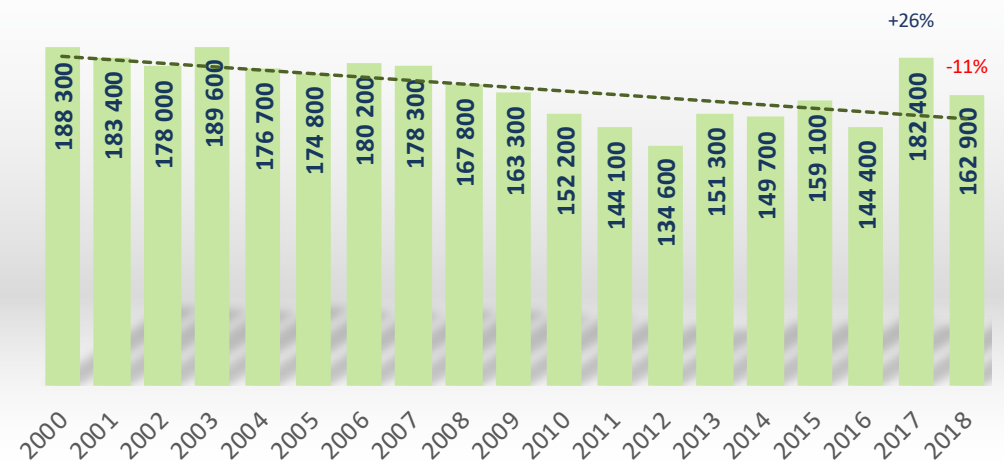


Winter 2019: **2nd** in country rankings
with a **13%** share of foreign overnights

Average change 2000-2019: **+7%**

Change 2019 compared to 2000: **+170%**

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



Summer 2018: **6th** in country rankings
with a **5%** share of foreign overnights

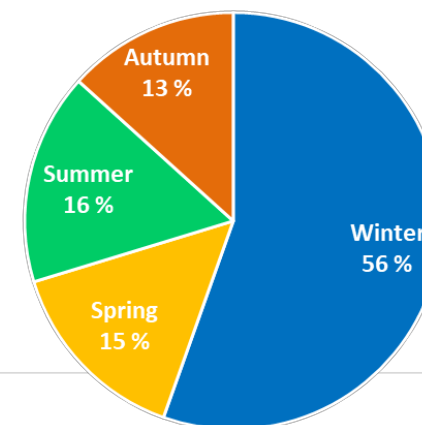
Average change 2000-2018: **0%**

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

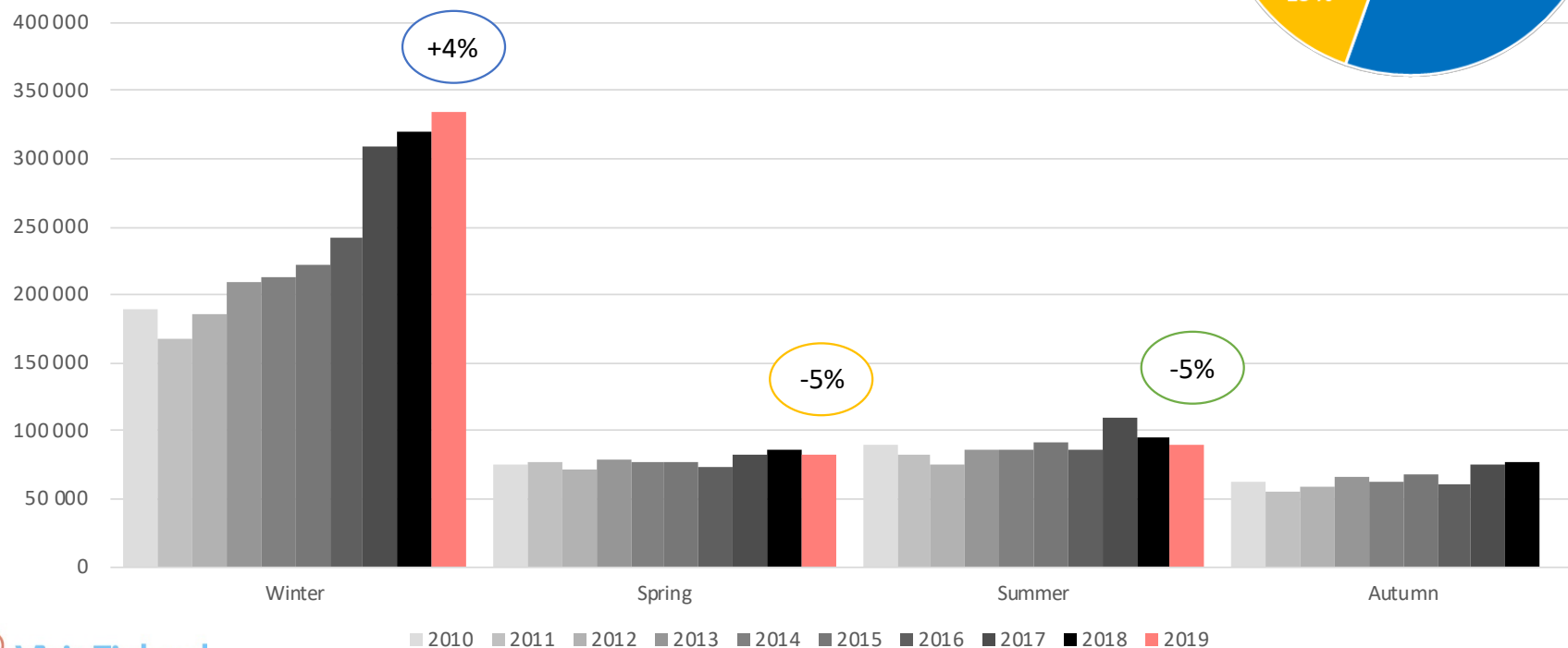
Trends for seasonal overnights in Finland British visitors

Winter is the most popular travel season among British visitors.

British overnights in 2018



British overnights by season



British overnights in Finland

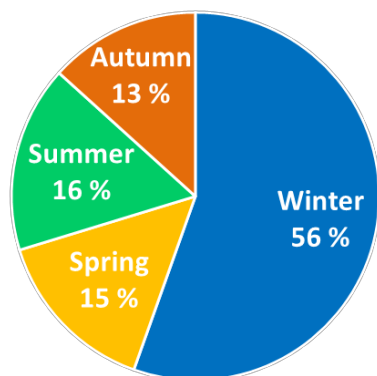
Seasonal overnights in 2018

Whole Finland

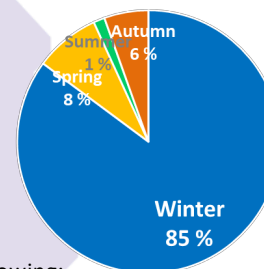
	No. of British overnights				Seasonal YtoY change		
	2016	2017	2018	2019	2017 vs. 2016	2018 vs. 2017	2019 vs. 2018
Winter (Dec-Feb)	242 600	308 700	320 900	334 800	+27%	+4%	+4%
Spring (Mar-May)	73 000	83 600	86 000	82 000	+15%	+3%	-5%
Summer (Jun-Aug)	85 800	110 000	95 000	90 700	+28%	-14%	-5%
Autumn (Sep-Nov)	61 700	75 900	77 000		+23%	+2%	

British overnights in Finland by season in 2018

WHOLE COUNTRY 2018



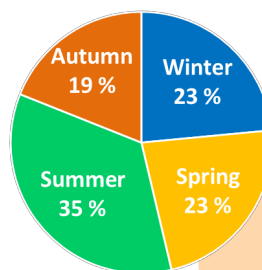
LAPLAND 2018



Importance growing:

- Kuusamo
- Rovaniemi
- Enontekiö
- Muonio

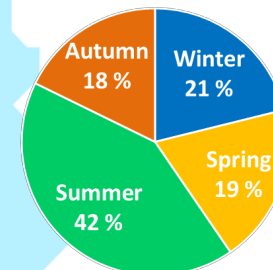
COAST AND ARCHIPELAGO 2018



Importance growing:

- Turku
- Oulu region

LAKELAND 2018



Importance growing:

- Lahti region

HELSINKI REGION 2018

