Spanish Market Context

• In 2018 Spanish traveller's overnights in Finland increased 8%, becoming the country with the biggest growth in foreign arrivals to Finland.

• Winter and Lapland are trendy amongst Spanish travellers but there is a great opportunity to increase demand in the Lakeland and Archipelago areas to maintain growth throughout the whole year.

• Finland’s emphasis on natural luxury through the lens of "responsible travelling" meets Spaniards growing interest in sustainability, slow travel and out of radar destinations.

• City breaks are important in the Spanish market which provides an opportunity to promote cities such as Helsinki, Tampere, Turku as vibrant cities around different themes.

• Finnish design and lifestyle draw attention in Spain. Visit Finland campaign: “Rent a Finn” was successful in the Spanish market.
Where do we rank in visitors minds?
When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland ranks in the middle of its Nordic competitors – behind Norway and Sweden.

**Spontaneous Destination Consideration**

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.
When prompted, consideration fell to #4 position within the Nordics as Iceland grew, though consideration levels are very similar for all but leader Norway.

**Total Consideration**

<table>
<thead>
<tr>
<th>Country</th>
<th>Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>58%</td>
</tr>
<tr>
<td>Norway</td>
<td>54%</td>
</tr>
<tr>
<td>Iceland</td>
<td>67%</td>
</tr>
<tr>
<td>Denmark</td>
<td>58%</td>
</tr>
<tr>
<td>Finland</td>
<td>55%</td>
</tr>
</tbody>
</table>

Rank '19 | #10

Rank change vs '15 | *

* Spain was not tracked in 2015
Claimed visitation to the Nordic region as a whole is low in Spain. Denmark see the best conversion to visits

Consideration to P3Y visit funnel

Finland

Sweden

Denmark

Norway

Iceland

Consideration Destination

Ever Visited

Visited last 3 years

Q7 CONSIDERATION DESTINATION, Q3 EVER VISITED DESTINATION, Q6 VISITED P3Y

Base: Total Sample (1,000)
Demographically, the older age group stands out as considering Finland less

**Age profile**

<table>
<thead>
<tr>
<th>Consideration Destination</th>
<th>Ever Visited</th>
<th>Visited last 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>18-24</td>
<td>25-34</td>
</tr>
<tr>
<td>55%</td>
<td>59%</td>
<td>56%</td>
</tr>
<tr>
<td>57%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>57%</td>
<td>46%</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Sig diff at 95% vs total sample*
There is little variation between Madrid and Barcelona.

**Madrid vs Barcelona**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Madrid</th>
<th>Barcelona</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consideration Destination</td>
<td>55%</td>
<td>53%</td>
<td>59%</td>
</tr>
<tr>
<td>Ever Visited</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Visited last 3 years</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Sig diff at 95% vs total sample
Key barrier to visit Finland and its Nordic neighbours lie around perceived expenses. Iceland is perceived as more difficult to reach and only for those that like to be outside a lot.
The lower consideration of Finland as a holiday destination is likely linked to a lack of knowledge – consideration to visit almost double amongst those who claim to hold good knowledge.
What are we known for as a travel destination?
When thinking about Finland, nature and winter themes come through strongly in Spain.

**Spontaneous Impressions - Finland**

- **Auroras, Santa Claus, snow, wooden house and hot chocolate**
- **Beautiful landscapes, auroras, good education, high culture**
- **Very beautiful forests, lakes, snow, wilderness, unique metal music and of course, Ville Valo.**
- **Arctic Circle, lakes, nature, language, reindeer, aurora borealis.**
- **Cross-country skiing in winter, visiting the home of Santa Claus, auroras**
- **Cold, fjords, snow-covered landscapes to wander**
- **Aurora borealis, cold snow landscapes**
- **Nature, tranquillity, peace, disconnection, democracy, education, high standard of living**
- **Very good education system. Very mountainous and green landscapes. A little sad about the weather**
- **The most important thing is that my son wants to go see the home of Santa Claus**
- **Lapland, northern lights, cold and snow, winter**
- **Cold, Snow, Winter sports, Auroras borealis, midnight sun, sauna**
- **It is a very cold country, which has amazing areas.**
- **Good atmosphere. Cold Clean Air**

*Visit Finland*

Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
The natural landscape associations also come through strongly in the rest of the Nordics. Sweden and Denmark also see good levels of cultural associations come through.

Spontaneous Impressions – Competitors

Base: Consideration Set: Sweden (524), Denmark (476), Norway (593), Iceland (519)

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Finland does not stand out much from its Nordic neighbours on imagery perceptions, though do fall slightly behind Sweden, Denmark and Norway in terms of cultural perceptions.
Iceland and Norway lead on most nature associations. Finland push through better in terms of lakes
There is room to grow Finland’s association with sustainable tourism amongst the Spanish population who are increasingly interested in sustainability.

**Image - It is known for providing/promoting sustainable tourism**

- Iceland: 52%
- Norway: 50%
- Sweden: 46%
- Finland: 45%
- Denmark: 42%

**Q13 IMAGE ASSOCIATIONS**
Do you associate any of these holiday destinations with the following statements?

- Madrid: 44%
- Barcelona: 38%
- 18-24: 46%
- 25-34: 49%
- 35-44: 50%
- 45-54: 46%
- 55-65: 46%
- Have a great deal of knowledge about Finland: 45%

Sig diff at 95% vs total sample

Base: Total Sample (1,000)
The Spanish perceive a sustainable travel destination, as a place that instils sustainable practices in all aspects of tourism, particularity accommodation and transport.

**Sustainable travel destination - OEs**

Where the influx of tourists is controlled and which cares for maximum performance on the environment; to minimize the damage caused by human intervention. At the same time, these destinations seeks to sensitize tourists regarding the care of the natural environment as well as integrating activities that involve the conservation of the environment within the tourist itinerary.

CITIES CONCERNED AND COMMITTED TO THE ENVIRONMENT (E.G. MOBILITY WITH BICYCLES TO REDUCE POLLUTION)

**Sustainable accommodation, not to waste water, waste recycling, no impact on environment**

Based on a respectful attitude to the environment, making good use of water and energy, always depositing waste in the corresponding containers.

**Pollute as little as possible**

Facilities not using plastic. Accommodation with reduced impact on the environment, using renewable energies.

**Destination to places where we can contribute to the health of the planet, using means of less polluting transport, ecological or local food, cities or countries that conserve their environment, which have natural parks and good vegetation green destination cities where you can recycle, you use bikes or electric cars, where there is no traffic in the centre, etc.**

Stay in places that care for the environment in its architecture, heating, water, electricity.

Try not to use a lot of transport and walk as much as possible. Reducing the impact on the planet by supporting the local economy and protecting wildlife. Not littering anywhere—respecting the environment.

**Environmental footprint - OEs**

Where the influx of tourists is controlled and which cares for maximum performance on the environment; to minimize the damage caused by human intervention. At the same time, these destinations seeks to sensitize tourists regarding the care of the natural environment as well as integrating activities that involve the conservation of the environment within the tourist itinerary.

**Cities concerned and committed to the environment (e.g. mobility with bicycles to reduce pollution)**

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Try not to use a lot of transport and walk as much as possible. Reducing the impact on the planet by supporting the local economy and protecting wildlife. Not littering anywhere—respecting the environment.
In terms of activities and experiences associated with Finland, saunas, visiting Santa’s home and sleigh rides have strong links in Spain.

Activities Associations

- **Saunas**: Finland
- **Sleeping in igloos**: Finland
- **Seeing the northern lights**: Finland
- **Cross-country skiing**: Finland
- **The midnight sun (24 hours of daylight)**: Finland
- **Visiting the home of Santa Claus**: Finland
- **Sailing, boating and water sports**: Finland
- **Sleigh rides pulled by huskies or reindeer**: Finland
- **Beaches and summer activities (e.g. swimming in the sea)**: Finland
- **Participating in sporting events**: Finland

Q15 ACTIVITIES ASSOCIATION
Do you associate any of these holiday destinations with the following activities and experiences?
Whilst not very well known, Moomins are also correctly linked to Finland. The pure nature and clean air is a clear association with all Nordic countries.
How are people visiting us?
The Spanish population most prefer to do tours of different places within a country, city breaks and cultural holidays.

<table>
<thead>
<tr>
<th>Preferred Holiday Type (Total Sample)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tours to multiple cities/locations within a country: 67%</td>
</tr>
<tr>
<td>City breaks: 66%</td>
</tr>
<tr>
<td>Cultural: 56%</td>
</tr>
<tr>
<td>Tours to multiple countries in a region: 37%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the summer: 37%</td>
</tr>
<tr>
<td>Beach: 36%</td>
</tr>
<tr>
<td>Country holidays: 32%</td>
</tr>
<tr>
<td>Relaxation &amp; well-being: 28%</td>
</tr>
<tr>
<td>Festive holidays at Christmas: 26%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter: 21%</td>
</tr>
<tr>
<td>Cruises: 21%</td>
</tr>
<tr>
<td>Health &amp; spa: 16%</td>
</tr>
<tr>
<td>Shopping trips: 11%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,000)
There is an opportunity to push and promote Helsinki, Tampere and Turku as great city break destinations as well as Finland’s cultural attractions to attract these type of travellers.

**Holiday Type Consideration**

There is an opportunity to push and promote Helsinki, Tampere and Turku as great city break destinations as well as Finland’s cultural attractions to attract these type of travellers. 

**Q12 CONSIDERATION HOLIDAY TYPE**
Which of the following types of holiday would you consider for the following destinations? Please select all that apply.

- City breaks
- Shopping trips
- Cruises
- Immersing yourself in local culture
- Visiting cultural attractions
- Tours to multiple cities/locations within a country
- Tours to multiple countries in a region
- Luxury travel

Base: Consideration Set: Finland (575), Sweden (524), Denmark (476), Norway (593), Iceland (519)
Whilst Finland hold good advantages in terms of festive, outdoor winter holidays and relaxation/spa these are not the most sought after holiday with the Spanish population

**Holiday Type Consideration**

<table>
<thead>
<tr>
<th>Holiday Type Consideration</th>
<th>Finland</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Norway</th>
<th>Iceland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
<td>65%</td>
<td>55%</td>
<td>50%</td>
<td>55%</td>
<td>50%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter</td>
<td>55%</td>
<td>45%</td>
<td>40%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Relaxation &amp; well-being eg. outdoor yoga, saunas</td>
<td>55%</td>
<td>45%</td>
<td>40%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Beach</td>
<td>10%</td>
<td>20%</td>
<td>30%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Festive holidays at Spas and retreats Christmas</td>
<td>75%</td>
<td>65%</td>
<td>55%</td>
<td>65%</td>
<td>55%</td>
</tr>
<tr>
<td>Countryside holidays</td>
<td>30%</td>
<td>20%</td>
<td>15%</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Camping</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Water activities and sports</td>
<td>20%</td>
<td>15%</td>
<td>10%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Significant differences 95%
Most Spanish people that are considering visiting Finland or the other Nordic countries, plan and make the bookings themselves.

**Trip Arranging**

- Myself: 47%
- Tour operator: 14%
- Ready-made package: 16%
- Mix - myself and tour operator: 21%
- Other: 1%

**Book trip myself**

- Sweden: 52%
- Denmark: 56%
- Norway: 45%
- Iceland: 44%

Base: Consideration Set: Finland (575), Sweden (524), Denmark (476), Norway (593), Iceland (519)
Two-thirds of Spanish travellers travel with their spouse or partner

**Travel Companion**

- **With spouse / partner**: 66%
- **With adult friend(s) aged 17+**: 28%
- **With young family aged 16 or under (e.g. children, grandchildren)**: 26%
- **With adult family aged 17+ (e.g. parent, sister)**: 23%
- **No-one, I travel alone**: 5%
- **With a school, college or study group**: 2%
- **Other**: 1%

Base: Total Sample (1,000)
Summary & Recommendations
Consideration of Finland as a holiday destination in Spain is lower than seen with our Nordic neighbours. The low consideration is likely driven by an overall lack of knowledge about what Finland has to offer as a holiday destination and is resulting in a low conversion to claimed visits.

The low claimed visitation isn’t unique to Finland but is true for the Nordic region as a whole. Although visitation to the Nordics is low, actual recorded visits from Spanish travellers has increased highlighting that the task isn’t impossible and well worth going after.

There isn’t much of a differentiation in terms of perceptions of Finland and the Nordic region as a whole.

As a market, Spanish travellers are particularly keen cultural holidays and city breaks. There is an opportunity to push and promote Helsinki, Tampere and Turku and their cultural attractions to better attract these type of travellers.

The precarious economic situation for young Spaniards means that focus should be placed on encouraging older people to visit Finland, especially the oldest cohort who are currently less likely to consider a trip to Finland.