



Visit Finland

Regional Pack (Madrid and Barcelona)



Spanish Market Context

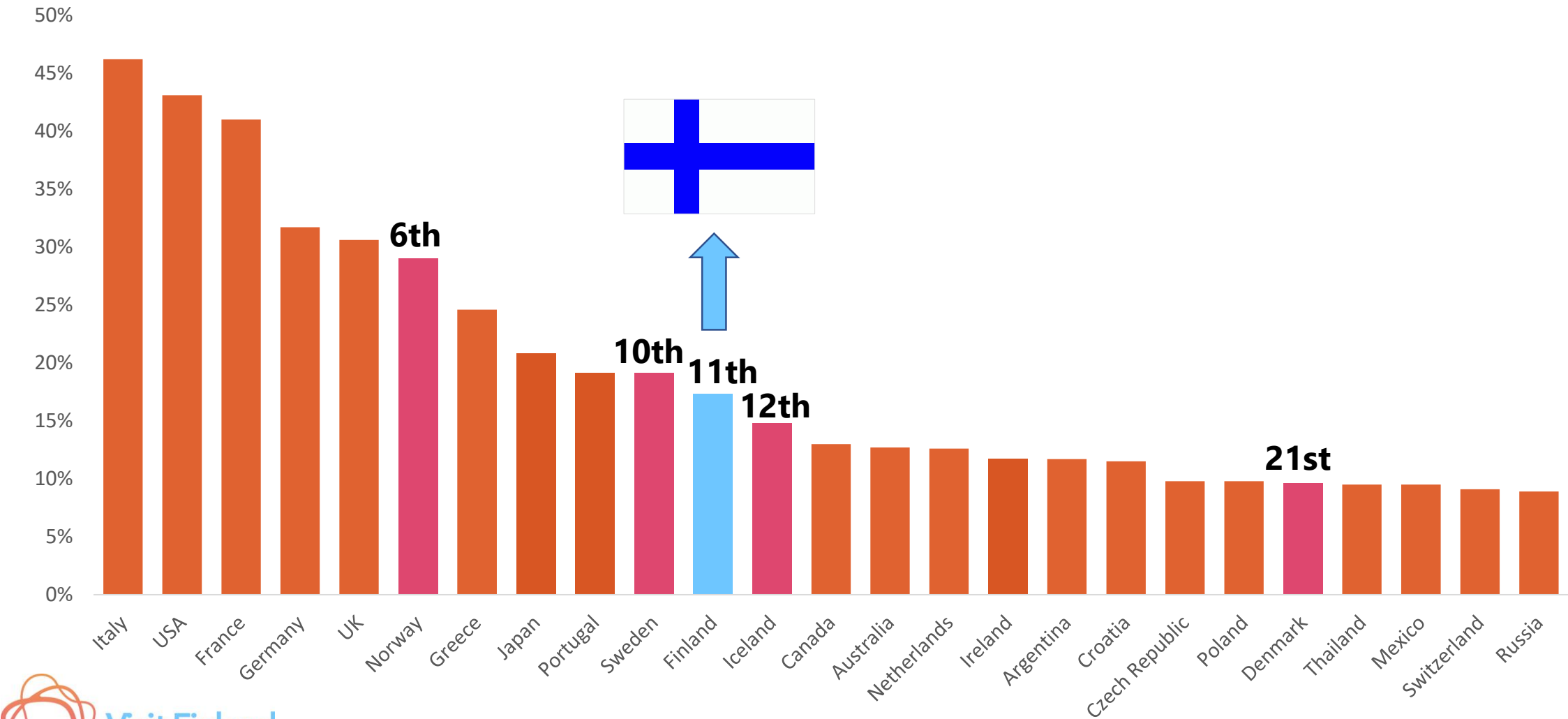
- In 2018 Spanish traveller's *overnights in Finland increased 8%*, becoming the country with the biggest growth in foreign arrivals to Finland.
- *Winter and Lapland are trendy* amongst Spanish travellers but there is a great opportunity to increase demand in the Lakeland and Archipelago areas to maintain 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



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Q2. SPONTANEOUS CONSIDERATION DESTINATION

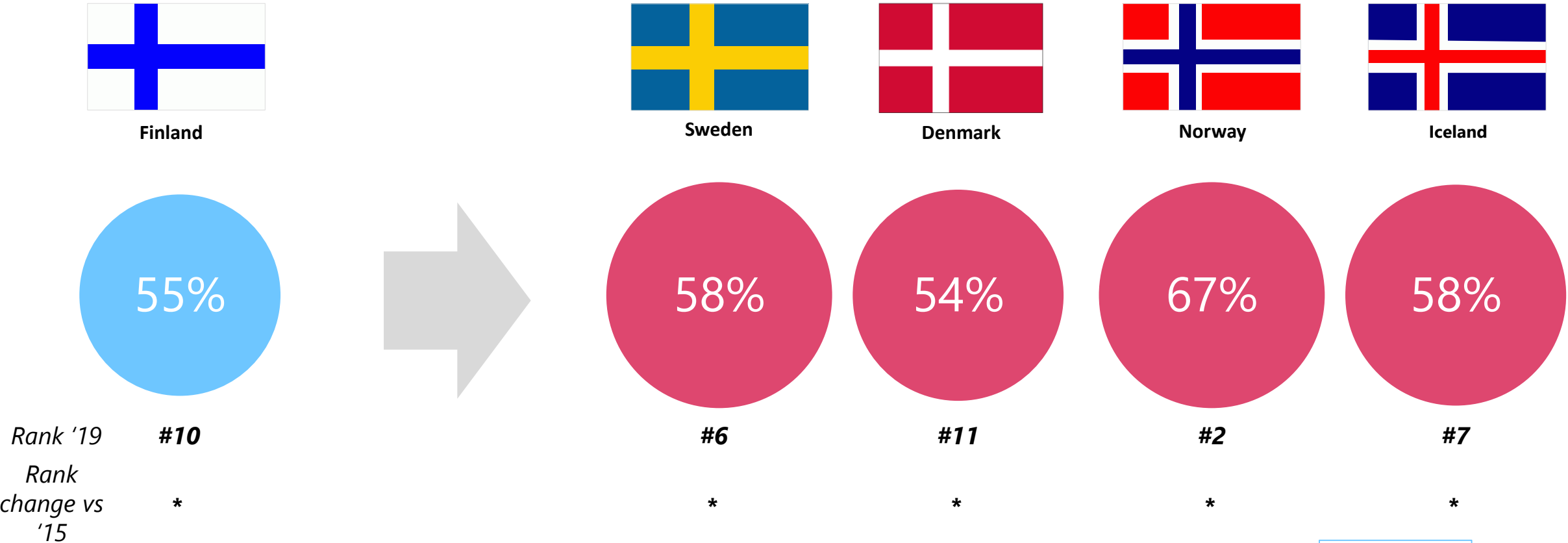
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,000)



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

Total Consideration



Q7. PROMPTED CONSIDERATION DESTINATION

Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

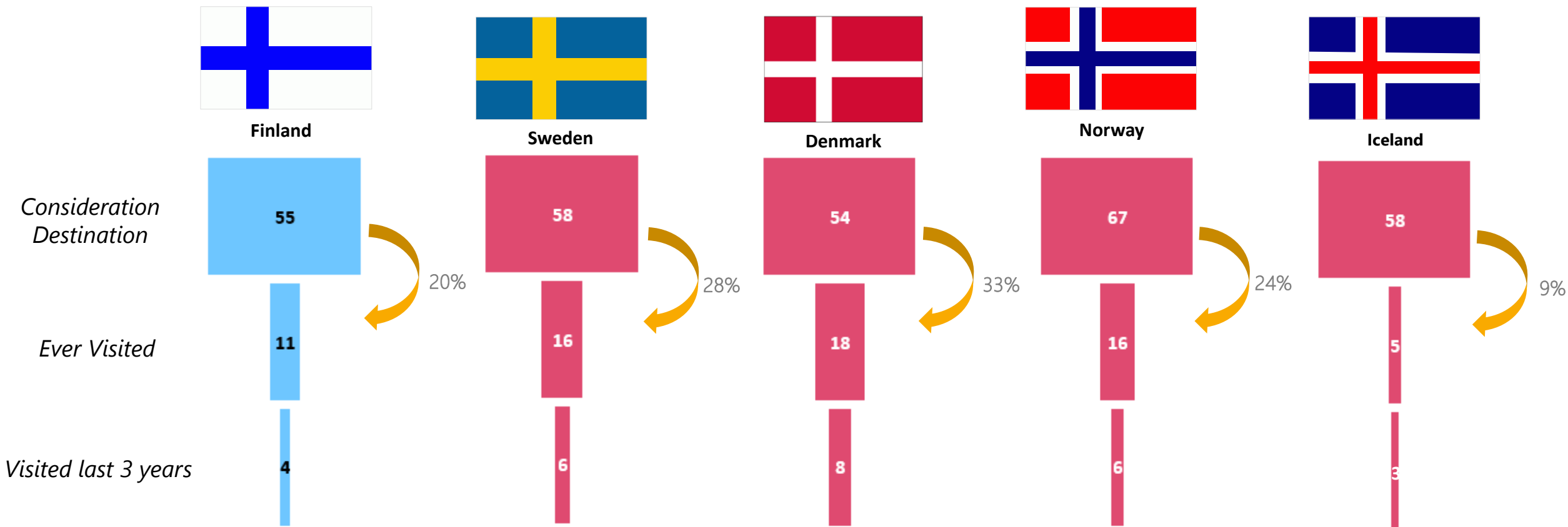
* Spain was not tracked in 2015



Base: Total Sample (1,000)

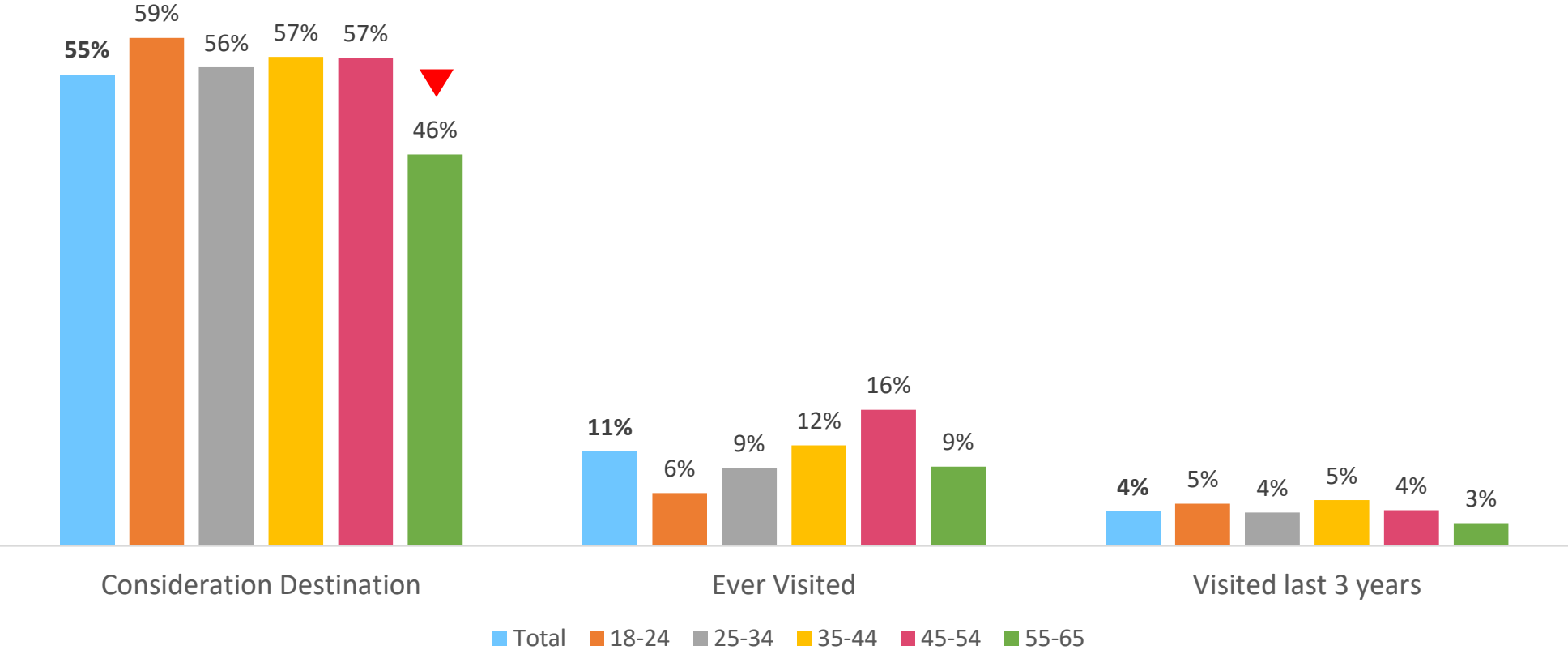
Claimed visitation to the Nordic region as a whole is low in Spain. Denmark see the best conversion to visits

Consideration to P3Y visit funnel



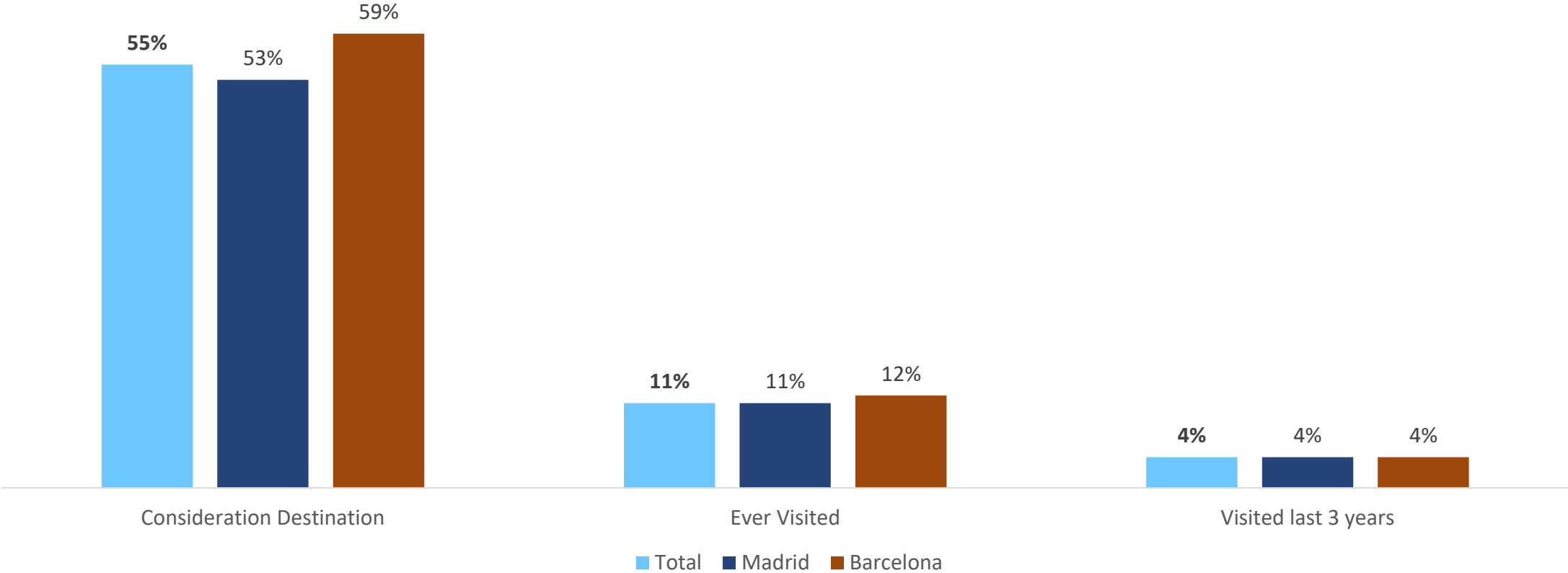
Demographically, the older age group stands out as considering Finland less

Age profile



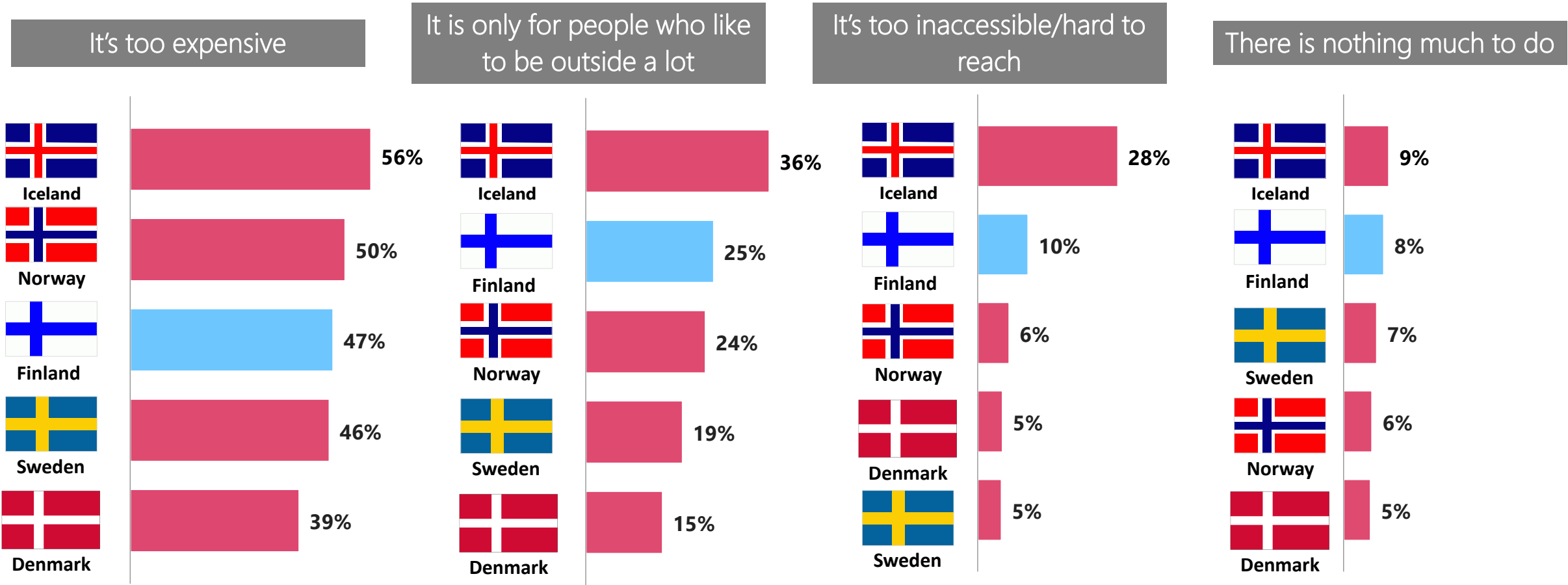
There is little variation between Madrid and Barcelona.

Madrid vs Barcelona



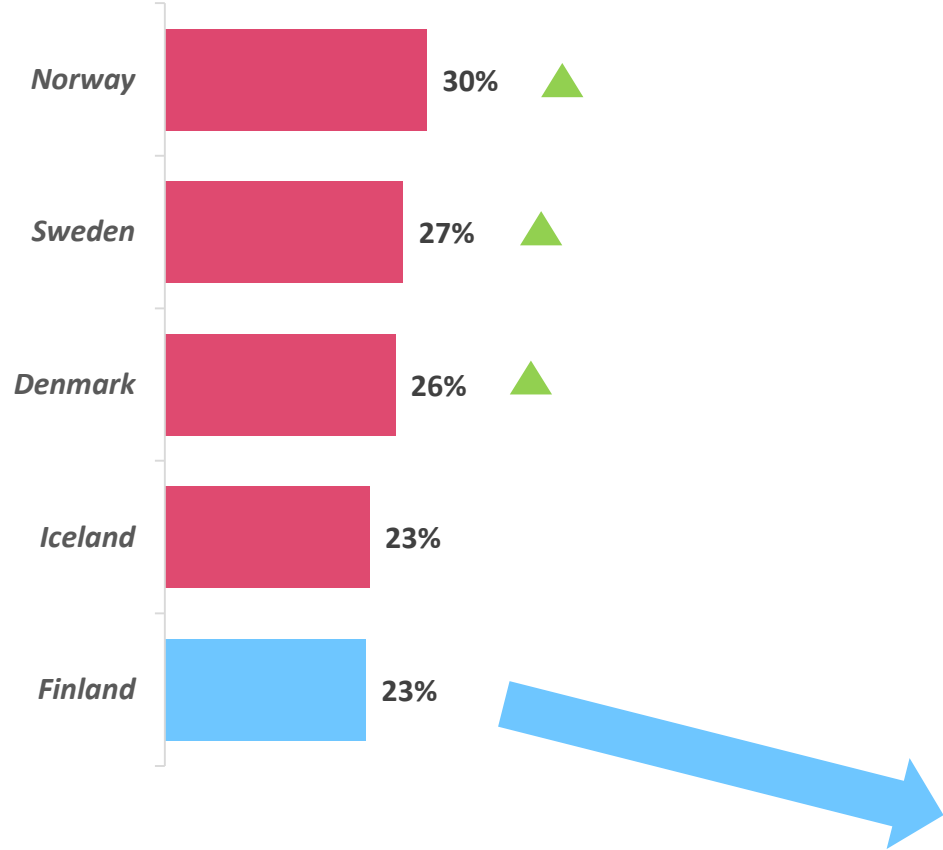
Key barrier to visit Finland and its Nordic neighbours lie around perceived expenses. Iceland is perceived as more difficult to reach and only for those that like to be outside a lot

Barriers to visit

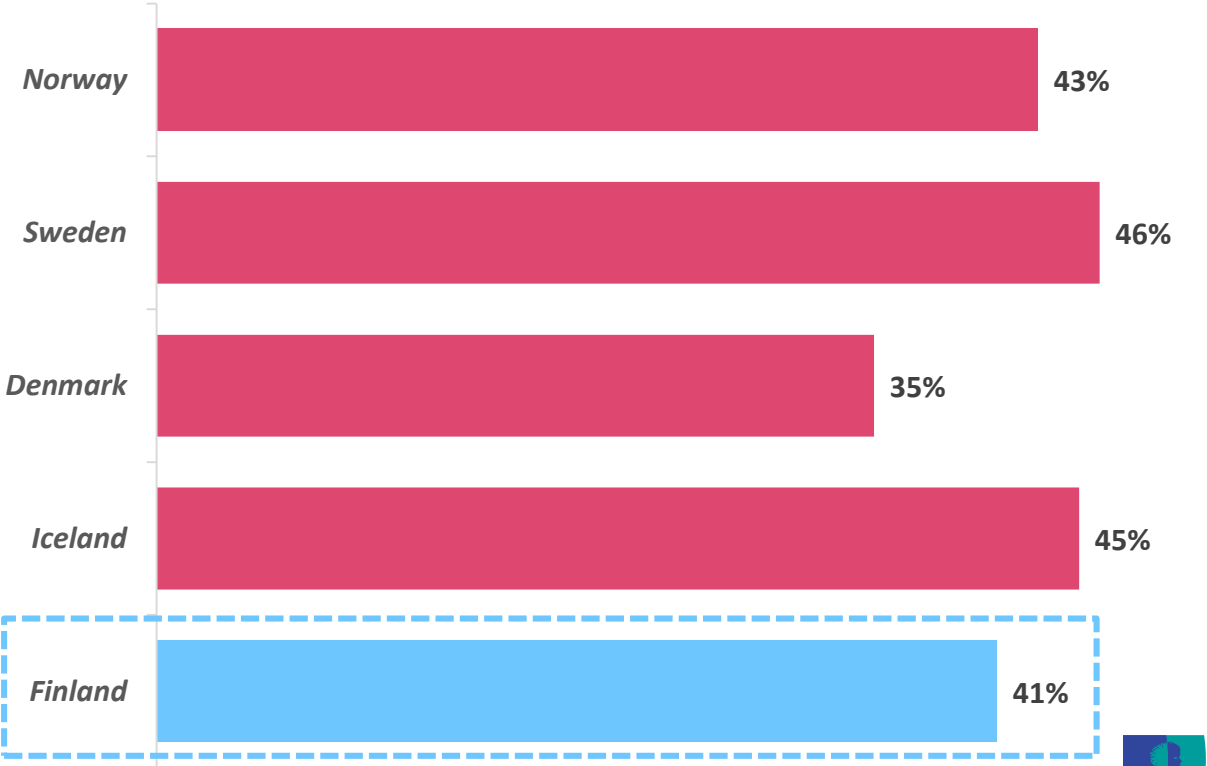


The lower consideration of Finland as a holiday destination is likely linked to a lack of knowledge – consideration to visit almost double amongst those who claim to hold good knowledge

Destination Knowledge (T2B)



Claimed visitation to country in the next three years (amongst those with more than a fair amount of knowledge of each country)



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Q10 DESTINATION KNOWLEDGE
How much do you feel you know about each of these countries as a holiday destination?

Sig diff at 95%
vs Finland



Base: Total Sample (1,000)



**What are we known
for as a travel
destination?**



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Spontaneous Impressions - Finland



*Auroras, Santa Claus, snow,
wooden house and hot
chocolate*

A country with unique and fascinating 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*

Good
atmosphere.
Cold Clean
Air

It is a very cold country, which has amazing areas.

The best place to observe auroras, visit its many forests, enjoy your food and, if you like skiing, it's a perfect place!

Aurora borealis
cold snow
landscapes

*Cold, fjords,
snow-covered
landscapes to
wander*

*Arctic Circle, lakes, nature,
language, reindeer, aurora
borealis.*

*Cross-country skiing in winter,
visiting the home of Santa
Claus, auroras*

*Beautiful landscapes,
auroras, good education,
high culture*

*Very beautiful forests, lakes,
snow, wilderness, unique
metal music and of course,
Ville Valo.*



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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.



Spontaneous Impressions – Competitors

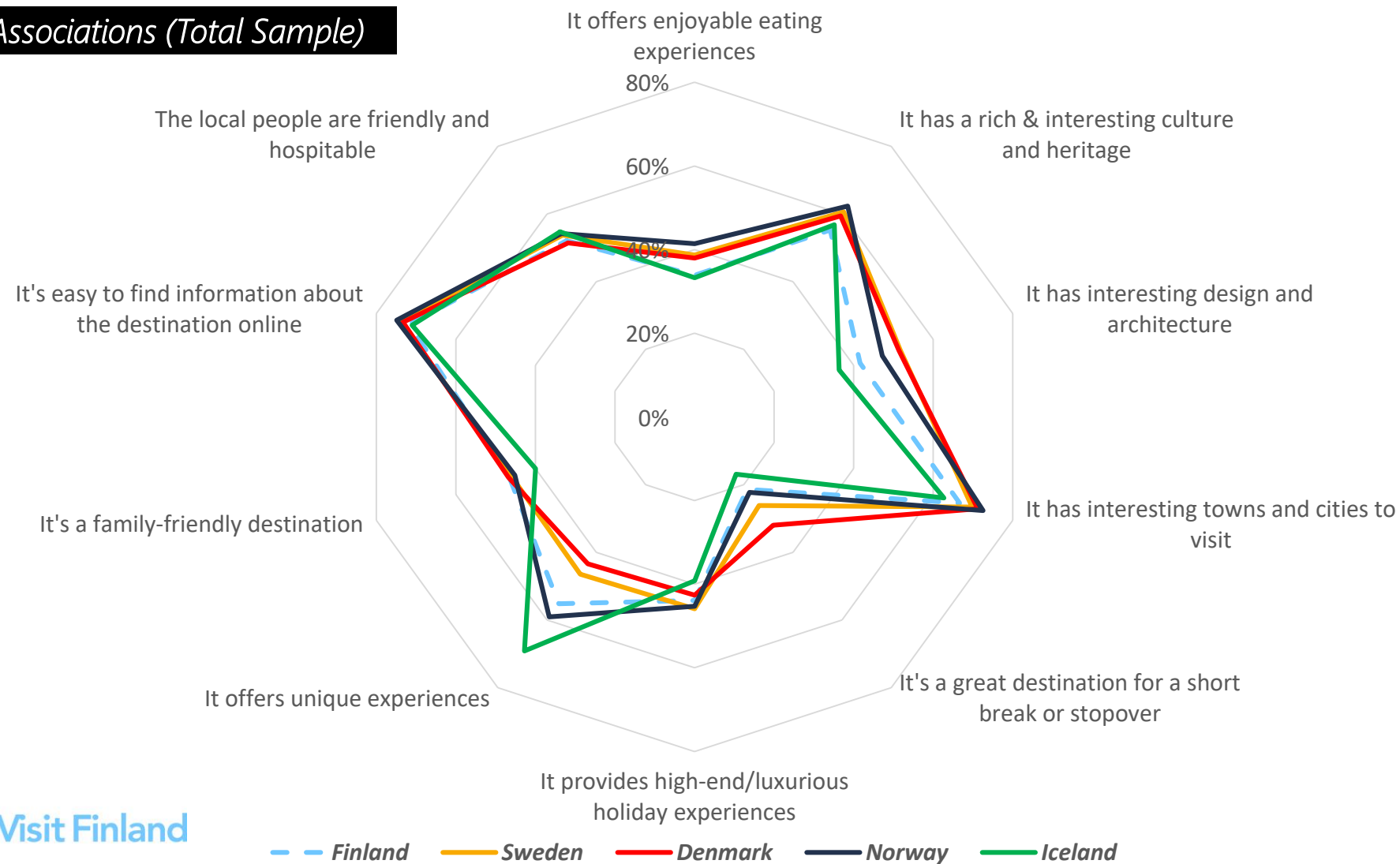


Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.



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

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

Do you associate any of these holiday destinations with the following statements?

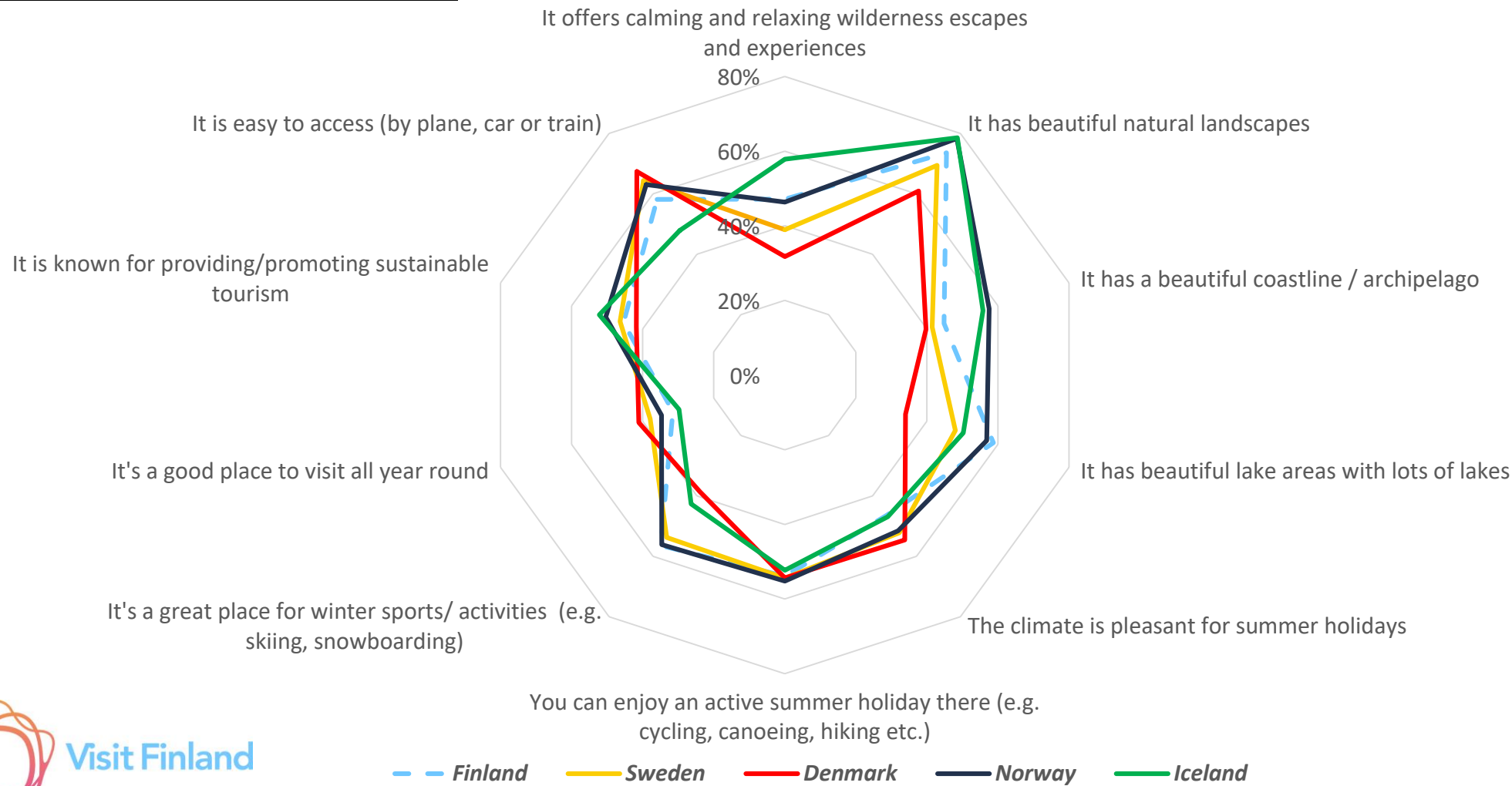
— Finland — Sweden — Denmark — Norway — Iceland



Base: Total Sample (1,000)

Iceland and Norway lead on most nature associations. Finland push through better in terms of lakes

Image Associations (total sample)



Q13 IMAGE ASSOCIATIONS

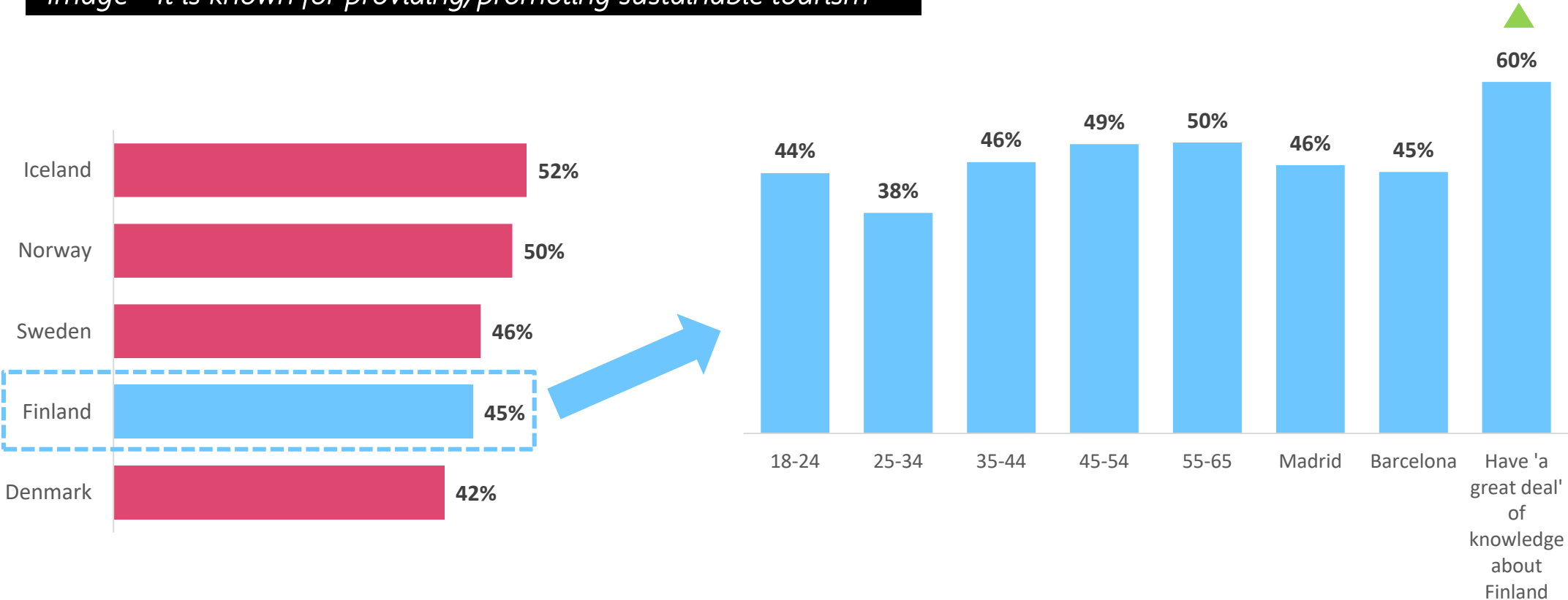
Do you associate any of these holiday destinations with the following statements?

Finland Sweden Denmark Norway Iceland



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



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Q13 IMAGE ASSOCIATIONS

Do you associate any of these holiday destinations with the following statements?

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, particularly 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 sensitise tourists regarding the care of the natural environment as well as integrating activities that involve the conservation of the environment within the tourist itinerary.

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

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

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



*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

Pollute as little as possible

One with sustainable practices in everything related to tourism: accommodation (solar panels, recycling ...), transportation (public, -bikes- organic), etc.

*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.



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Q23 SUSTAINABILITY

In your opinion, what is meant by a 'sustainable' travel destination?



Base: Total Sample (1,000)

Activity Associations

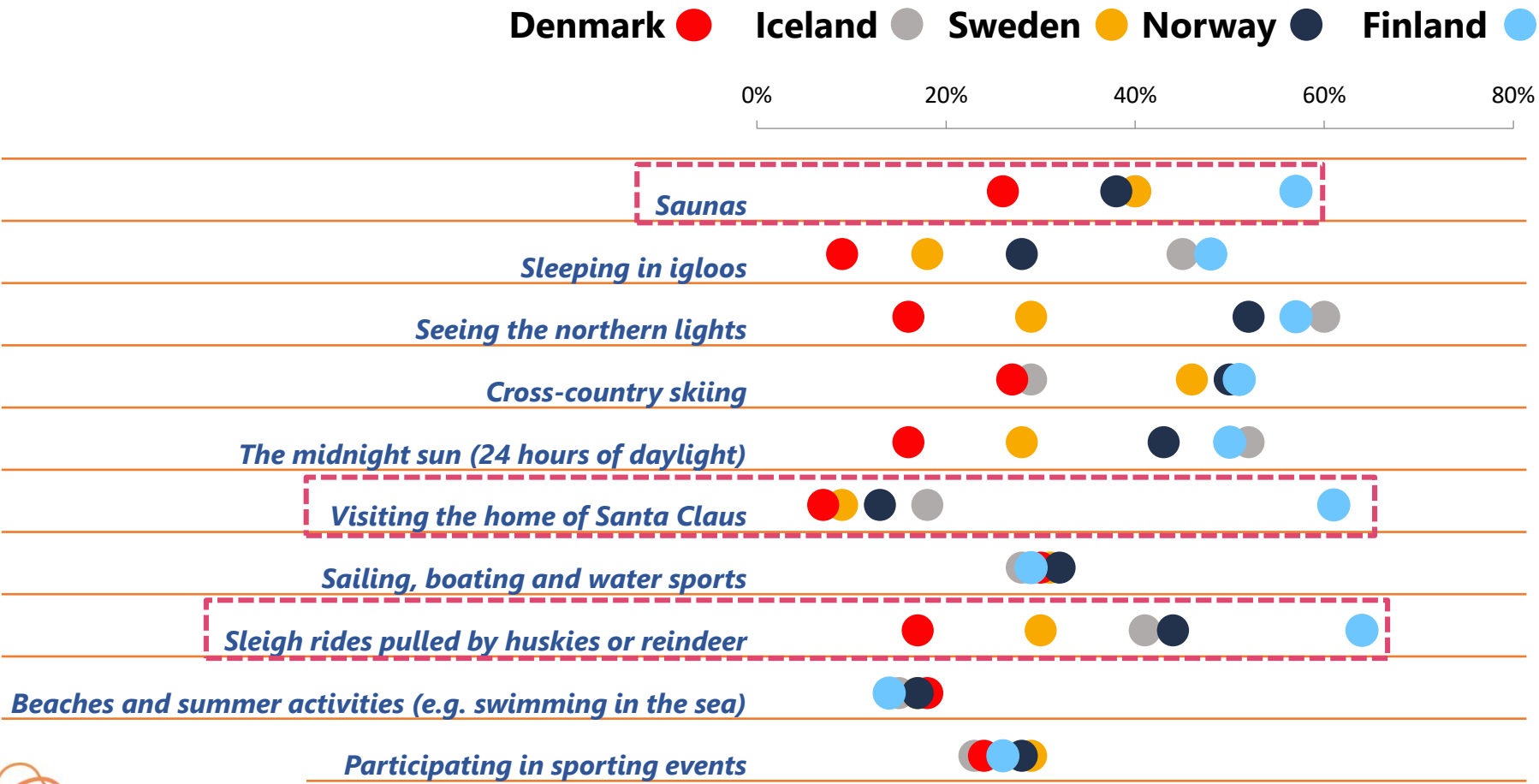


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In terms of activities and experiences associated with Finland, saunas, visiting Santa's home and sleigh rides have strong links in Spain

Activities Associations



Q15 ACTIVITIES ASSOCIATION

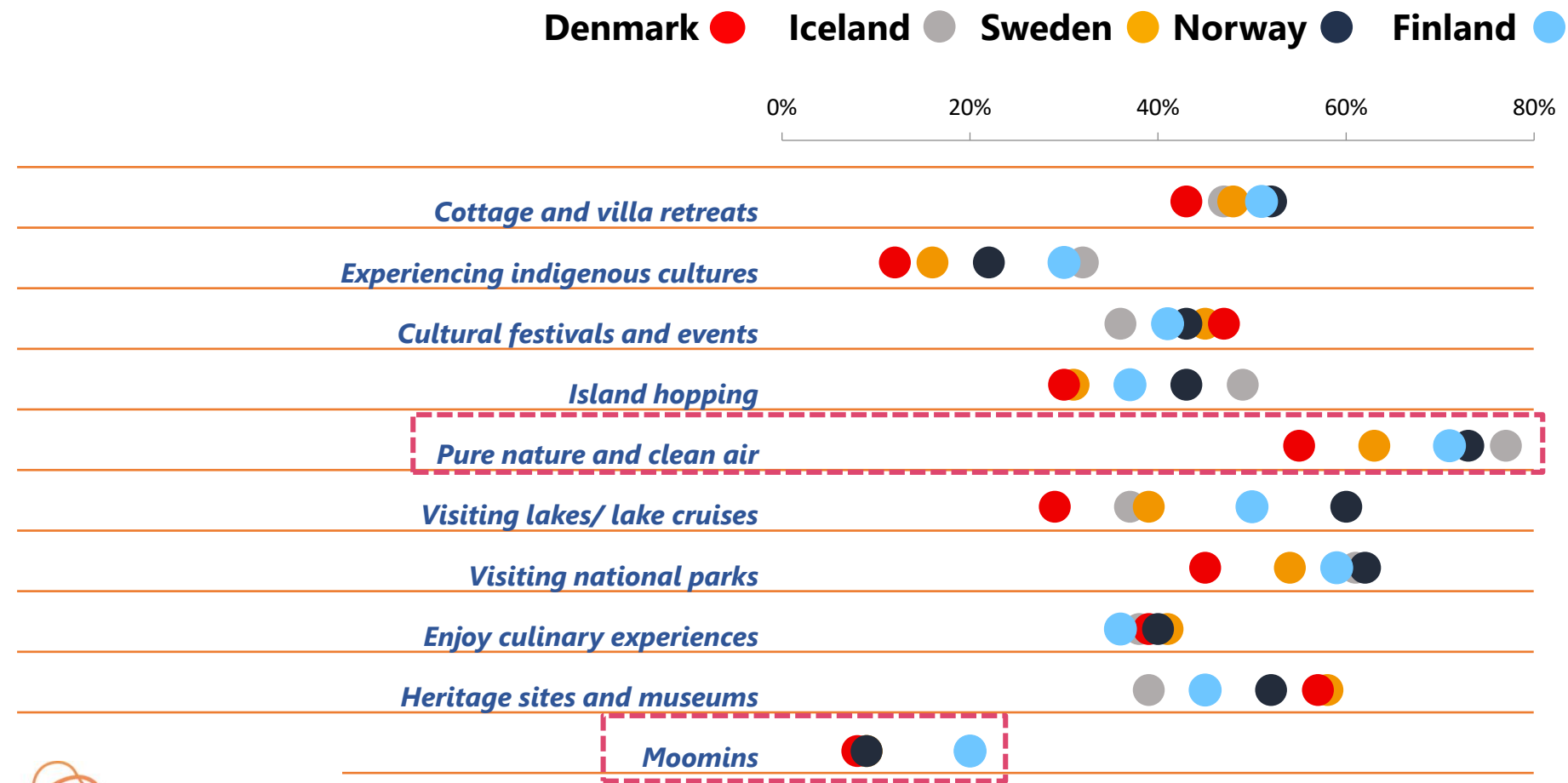
Do you associate any of these holiday destinations with the following activities and experiences?



Base: Total Sample (1,000)

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

Activities Associations



Q15 ACTIVITIES ASSOCIATION

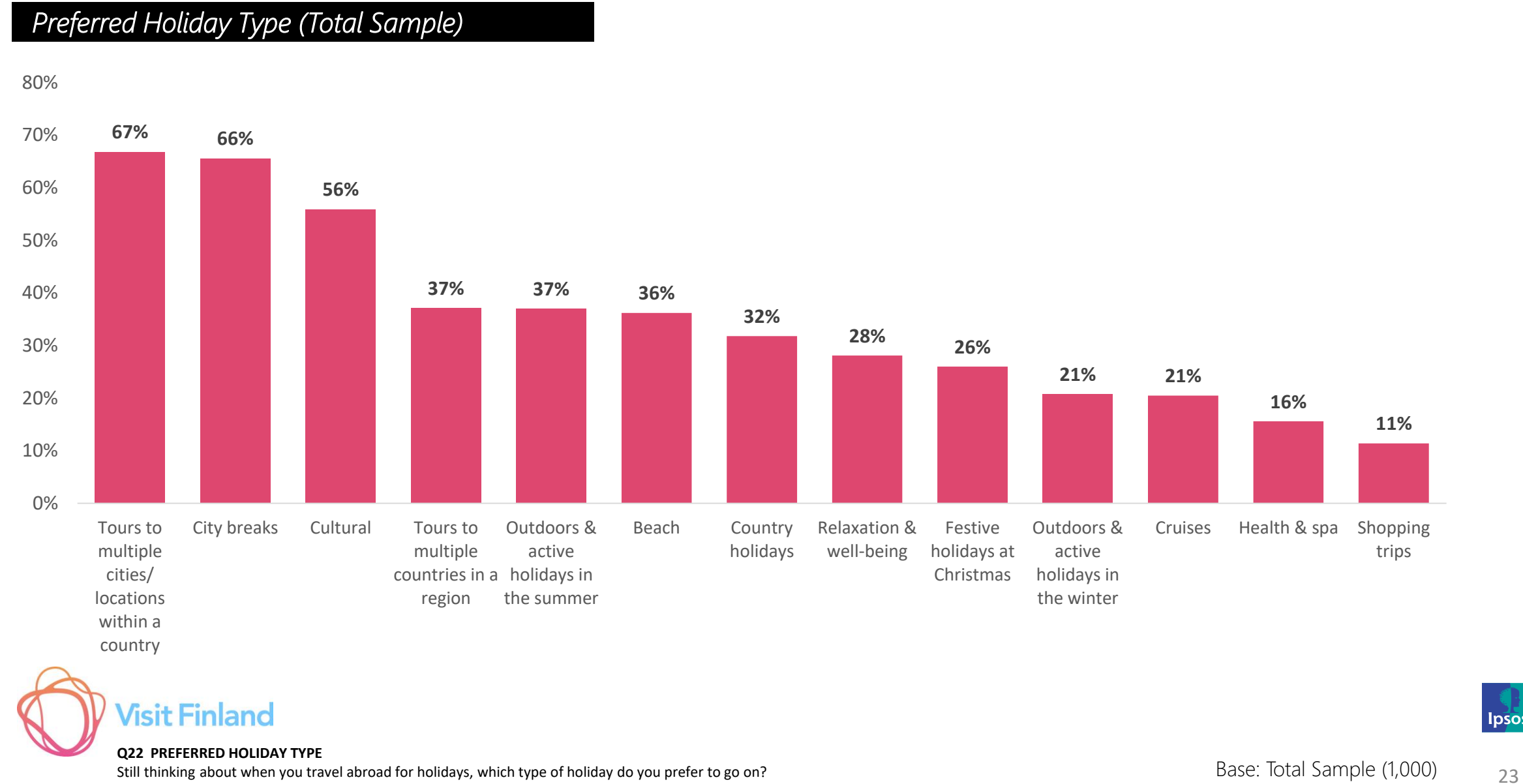
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Base: Total Sample (1,000)

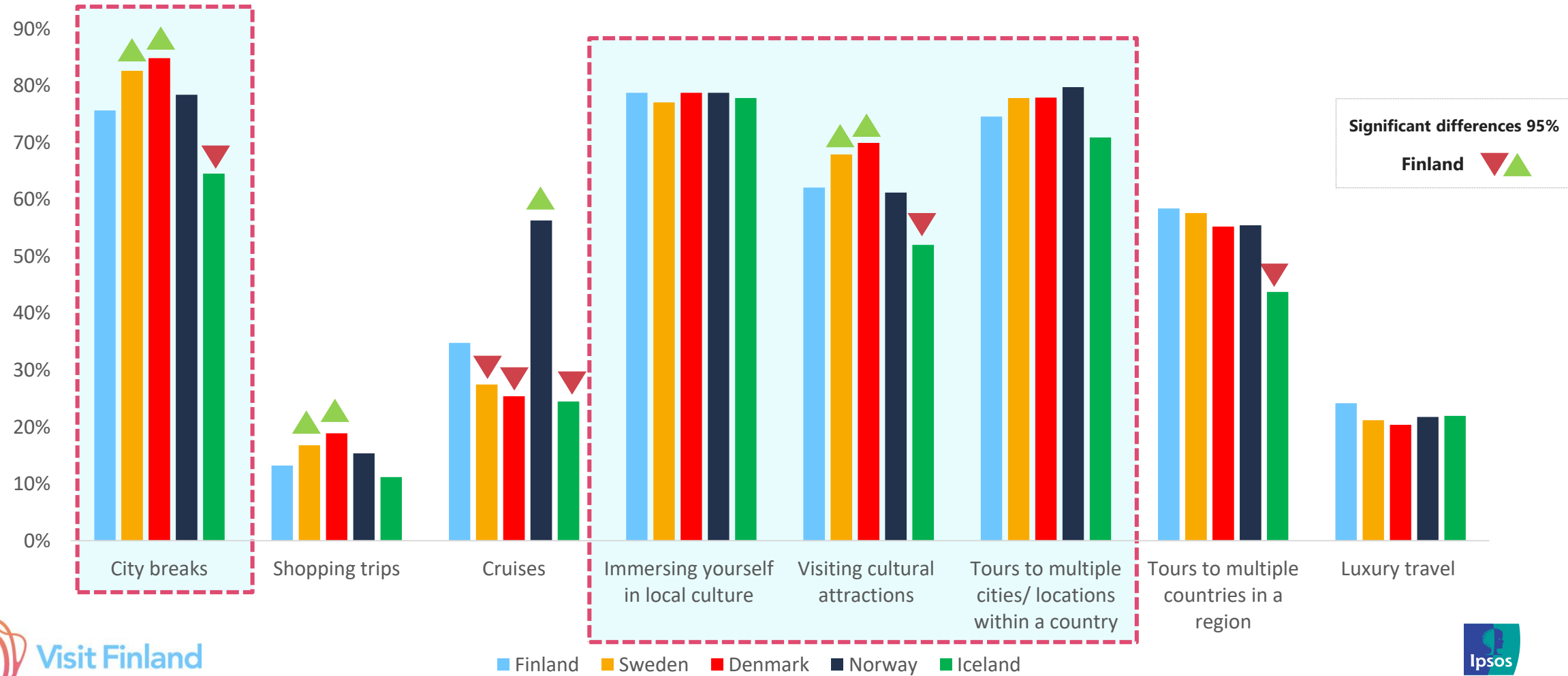
How are people visiting us?

The Spanish population most prefer to do tours of different places within a country, city breaks and cultural holidays



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



Q12 CONSIDERATION HOLIDAY TYPE

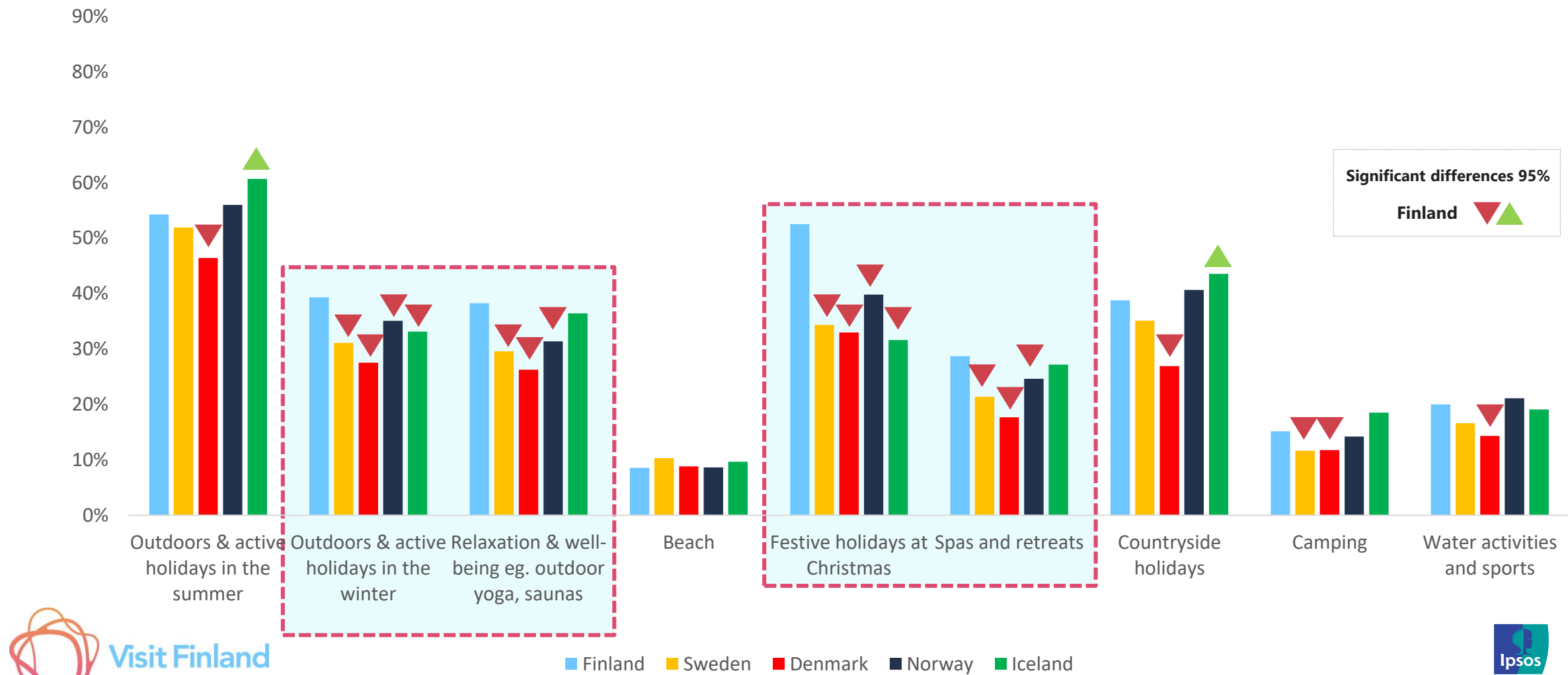
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

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



Q12 CONSIDERATION HOLIDAY TYPE

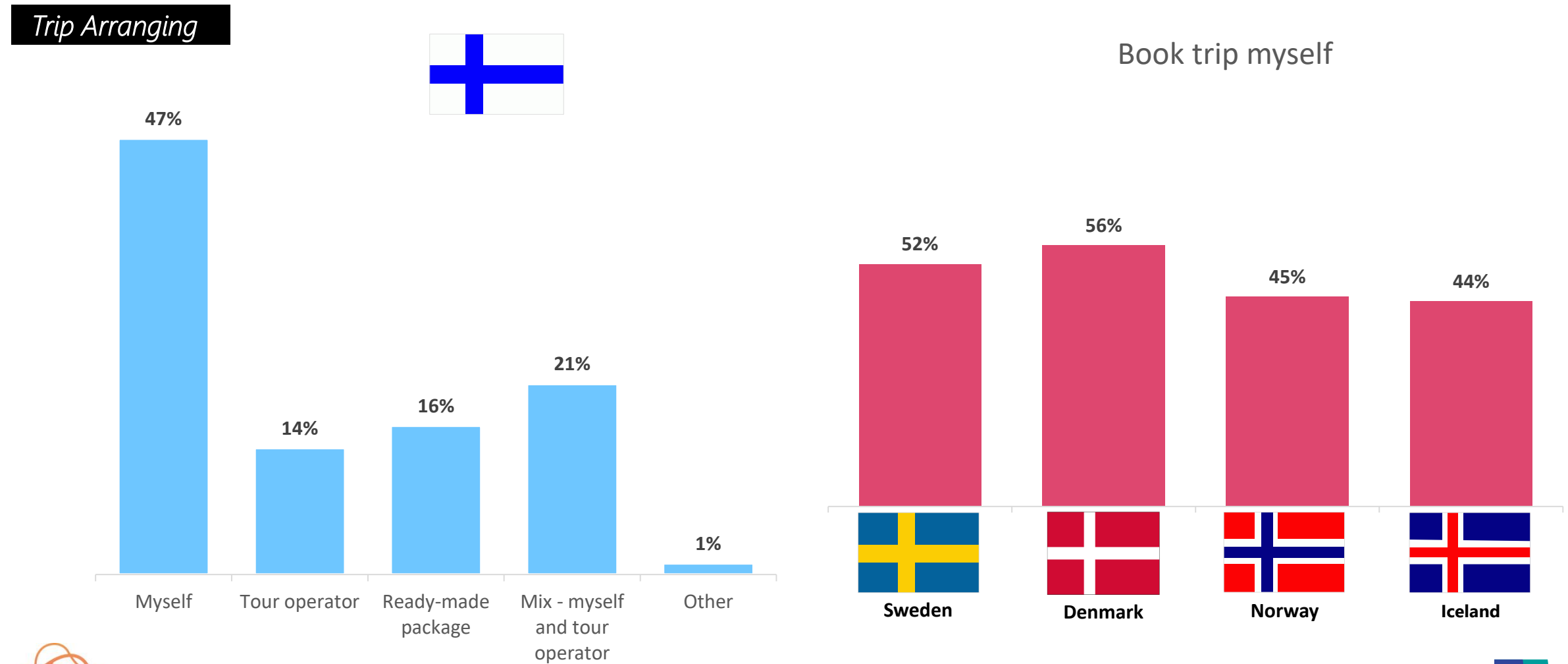
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Base: Consideration Set: Finland (575), Sweden (524), Denmark (476), Norway (593), Iceland (519)

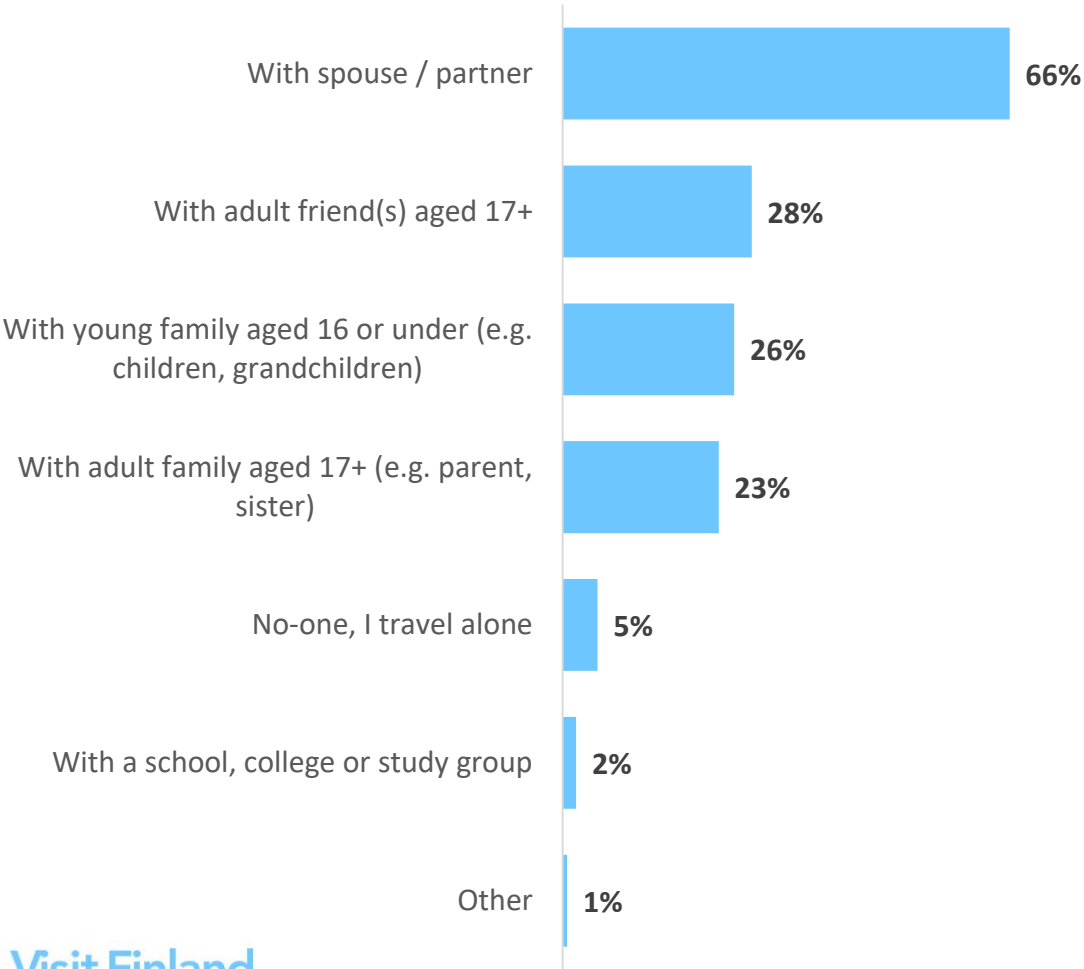


Most Spanish people that are considering visiting Finland or the other Nordic countries, plan and make the bookings themselves



Two-thirds of Spanish travellers travel with their spouse or partner

Travel Companion



Q21 TRAVEL COMPANION
When you travel abroad for holidays, who do you usually travel with?



Base: Total Sample (1,000)

Summary & Recommendations

Summary and Final Thoughts.

- 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.



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