The United Kingdom (UK)

Country Pack
UK Market Context

• The UK is the 4th largest market for travellers to Finland.

• Finland is still considered a novelty destination compared with the other Nordic countries. We are also gaining a lot of visibility in the UK media which is creating a buzz and momentum to travel here.

• Winter travel to Finland is still growing and there is a demand for special accommodation and winter activities. There is an increase in the number of flights from the UK to Lapland and potential exists for summer travel to Lapland as well.

• There is also an increasing demand for city breaks, wellness and nature holidays in the UK.
Where do we rank in visitors minds?
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 21st place.

**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 of Finland as a holiday destination is stronger but still falls behind our Nordic neighbours.

**Total Consideration**

- Finland: 66% (Rank '19 #12, change vs '15 +3)
- Sweden: 76% (#4)
- Norway: 76% (#3)
- Denmark: 72% (#8)
- Iceland: 75% (#6)

* = different methodology and consideration set used

Q7. PROMPTED CONSIDERATION DESTINATION
Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?
This is further seen when looking at claimed visitation. Denmark and Sweden are considerably stronger at converting considerers to visitors.

**Consideration to P3Y visit funnel**

<table>
<thead>
<tr>
<th>Country</th>
<th>Consideration</th>
<th>Destination</th>
<th>Ever Visited</th>
<th>Visited last 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>66</td>
<td></td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>Sweden</td>
<td>76</td>
<td></td>
<td>28</td>
<td>12</td>
</tr>
<tr>
<td>Denmark</td>
<td>72</td>
<td></td>
<td>29</td>
<td>13</td>
</tr>
<tr>
<td>Norway</td>
<td>76</td>
<td></td>
<td>22</td>
<td>10</td>
</tr>
<tr>
<td>Iceland</td>
<td>75</td>
<td></td>
<td>19</td>
<td>10</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,200)
The lower consideration towards Finland as a holiday destination is likely linked to a lack of knowledge. A majority of those with strong knowledge are considering visiting it, highlighting a need to grow knowledge.

Claimed visitation to country in the next three years based on more than a fair amount of knowledge of that country

- **Iceland**: 70%
- **Norway**: 65%
- **Sweden**: 69%
- **Denmark**: 70%
- **Finland**: 60%

*Base: Total Sample (1,200)*
Demographically, the young are the least likely to be aware, consider or have visited Finland whilst the 35-44 group show the most momentum towards a Finland holiday.

**Age profile**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Consideration Destination</th>
<th>Ever Visited</th>
<th>Visited last 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>66%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>25-34</td>
<td>64%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>35-44</td>
<td>70%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>45-54</td>
<td>66%</td>
<td>14%</td>
<td>4%</td>
</tr>
<tr>
<td>55-65</td>
<td>70%</td>
<td>14%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Sig diff at 95% vs Total Sample*
There is little variation between London and the rest of the country.

**London vs rest of country**

<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>Non London</td>
<td>London</td>
</tr>
<tr>
<td>66%</td>
<td>67%</td>
<td>64%</td>
</tr>
<tr>
<td>14%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

Base: Total Sample (1,200)
Key perceived barriers to visit Finland and its Nordic neighbours lie around value and mainly offering outdoor activities. Finland is perceived as more difficult to reach.

**Barriers to visit**

- **It's too expensive**
  - Iceland: 42%
  - Norway: 39%
  - Sweden: 35%
  - Denmark: 28%
  - Finland: 27%

- **It is only for people who like to be outside a lot**
  - Iceland: 25%
  - Norway: 18%
  - Sweden: 13%
  - Denmark: 12%

- **It's too inaccessible/hard to reach**
  - Iceland: 16%
  - Norway: 11%
  - Sweden: 6%
  - Denmark: 4%

- **There is nothing much to do**
  - Finland: 9%
  - Iceland: 8%
  - Norway: 7%
  - Sweden: 6%

Base: Total Sample (1,200)
What are we known for as a travel destination?
Mental Network Analysis: discover what is truly associated with Finland

What is Mental Network analysis?
We ask travellers to use their own words to share emotions about destinations – we then use text mining software to identify mental shortcuts to destinations. – One step beyond spontaneous impressions

What does it show us?
We can accurately quantify the main themes and highlight distinctive associations for Finland and competitors

- Reveal distinctive associations that can be used in communications
- Build country positioning from genuine consumer inputs
- Define country associations in own consumer words
- Uncover unknown dimensions
- Get a read of potential negative associations
- Check if the perception of country in consumers’ minds matches the intended positioning

13
How to read the mental network map?

**STRENGTH**
The size of the bubbles/thickness of lines represents the percent of mentions.

**CONNECTEDNESS**
Inter-connections between bubbles represent co-occurrences of mentions of a theme:
- These are themes/associations that respondents mentally link together.

**RICHNESS**
Each bubble represents a theme/association.
- The more the number of brand associations, the more the number of bubbles in the map.

Color coding represents groupings of themes, which can be based on various things:
- Sentiment (positive, negative)
- Other groupings (e.g., product related themes vs contextual themes vs emotion themes)

Themes or associations that are closer together are NOT more closely related, UNLESS they are connected by a line.
Snow and Nature elements come through strongly among spontaneous associations with Finland in the UK.

**Country Mental Network - Finland**

- **Functional**: Helsinki
- **Nordic Elements**: Christmas time, Father Christmas, Santa
- **Attractive**: The food
- **Scenic Elements**: Beautiful scenery, landscape
- **Cultural**: Scandanavian, Cultural | Culture | Traditions
- **Food/Drink**: Beer, alcohol
- **Landmarks**: Helsinki
- **Natural Elements**: Beautiful | Attractive, Love | Romantic, Beautiful scenery | landscape
- **Climatic Elements**: Cold, Dark, Winter activities (Ski, Sled)
- **Negative Image**: Expensive

**Base**: Consideration Set: Finland (800)
The association to Snow is also strong in Sweden, as is its association as being an expensive country.
Copenhagen is associated with its Food, the Expense of the city, and The Little Mermaid. Denmark lacks on the number and strength of its Nature associations, compared to the other Nordics.

**Country Mental Network - Denmark**

- **The food**: Expensive
- **The Little Mermaid**: Hans Christian Andersen
- **Cycling**
- **Architecture**: Buildings
- **Art**: Museums
- **Lego**: Legoland
- **Beautiful scenery**: landscape
- **Clean**: Fresh
- **The sea**: seaside
- **Nature**: Rugged landscapes
- **Flat**: Nature
- **History**: Historic
- **Vikings**: Norse attractions
- **Cultural**: Culture
- **Traditions**
- **Beer**: alcohol
- **Interesting**: Different
- **Nice**: Good
- **Good**: Great
- **Love**: Romantic
- **Friendly**: nice, welcoming
- **Relaxed**: Easy going
- **Beautiful**: Attractive
- **Relaxed**: Easy going
- **Peaceful**
- **Clean**: Fresh
- **Flat**: Nature
- **Rugged**: landscapes
- **Green**: The sea
- **Seaside**: beaches
- **Beautiful**: scenery
- **Scenery**: landscape
- **Nordics**

Base: Consideration Set: Denmark (690)

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.
Norway is strongly associated with its Fjords. The Natural and Expense associations are all highly connected and interrelated.

Country Mental Network - Norway

Beautiful scenery | landscape
Expensive
Clean | Fresh
Beautiful | Attractive
Good | Great Interesting | Different
Quiet | Peaceful
The food
Amazing
Friendly | nice | welcoming people
Winter activities (Ski, Sled)
Fish | Fishing
Wildlife (whales, bears, reindeer)
Scenery | Views
Lakes
Cold, Dark
Nature | Rugged landscapes | Green
Fjords
Cruises
Oslo
Forests
Mountains
Northern Lights
Norway

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.

Base: Consideration Set: Norway (765)
A similar picture to Norway emerges in Iceland, although Iceland’s Natural associations are distinct in their geothermic associations (Hot springs, Blue Lagoon and Volcanoes).

Country Mental Network - Iceland

- Hot springs | Hot spas | Geysers | Thermal pool
- Nature | Rugged landscapes | Green
- Snow | Ice | Frozen landscapes | Glaciers
- Waterfalls
- Blue lagoon
- Scenery | Views
- Mountains
- Wildlife (whales, bears, reindeer)
- Beautiful scenery | landscape
- Clean | Fresh
- Far away | Remote
- Friendly | nice | welcoming people
- Beautiful | Attractive
- The food
- Amazing
- Spectacular | Stunning
- Interesting | Different
- Reykjavik

Base: Consideration Set: Iceland (757)
Viewing the shared associations between the Nordics, Finland, Iceland and Norway share the theme for Snow, but Finland avoids being labelled as Expensive like the other destinations.

**Country Mental Network – UK Market**

Base: Consideration Set: Finland (800), Sweden (758), Denmark (690), Norway (765), Iceland (757)
Looking at areas of distinction, the more generic ‘Nature’ association is more linked to Iceland and Norway, whereas Finland holds smaller associations to Lakes and Forest and seasonal elements.

**Mental Networks – UK market**
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.
Snow and Nature elements come through strongly among spontaneous associations with Finland in the UK

**Country Mental Network - Finland**

Christmas and winter breaks. Fish, cold weather, the outdoors.

A place where you can see the northern lights

Visiting Santa!

Scenic, unspoiled, ecologically sound and friendly

Beautiful scenery, ability to get close to the nature and wilderness, guaranteed winter snow

Breath-taking snowscapes, lots of adventure and activities such as skiing, kayaking. Very cold climate and land of the midnight sun.

To see Father Christmas in December and the Northern lights. Again, a place to see the natural sights of the country but also expensive.

Very cold country, lots of saunas, lots of snow and winter sports like skiing, Helsinki

Cold - I think of snow, dark winters, pine forests, northern lights. Expensive but egalitarian society. Unique language.

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

Base: Consideration Set: Finland (809)
The capital cities are more of an emphasis in Denmark and Sweden, while natural elements like fjords and northern lights are the focus for Norway and Iceland.

Country Mental Network – Competitors

Sweden

- Expensive
- Cold
- People
- stockholm
- Food
- Clean

Denmark

- Mermaid
- Copenhagen
- Visit
- Friendly
- People
- Nice
- Clean

Norway

- Fjord
- Expensive
- Cold
- Nature
- Snow

Iceland

- Light
- Northern
- Blue
- Snow
- Hot

Base: Consideration Set: Sweden (766), Denmark (705), Norway (774), Iceland (765)
On the whole, there isn’t much differentiation between the Nordic countries in terms of image perceptions amongst the wider UK population. In keeping with lower knowledge, Finland’s image perceptions are also slightly lower.

*Image Associations (Total Sample)*

- It offers enjoyable eating experiences: 80%
- The local people are friendly and hospitable: 60%
- It has a rich & interesting culture and heritage: 40%
- It has interesting design and architecture: 40%
- It has interesting towns and cities to visit: 40%
- It’s a family-friendly destination: 40%
- It provides high-end/luxurious holiday experiences: 20%
- It’s easy to find information about the destination online: 20%
- It’s a great destination for a short break or stopover: 20%
- It offers unique experiences: 0%

Q13 IMAGE ASSOCIATIONS

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

- Finland
- Sweden
- Denmark
- Norway
- Iceland

Base: Total Sample (1,200)
Do you associate any of these holiday destinations with the following statements?

- It offers calming and relaxing wilderness escapes and experiences (80%)
- It is easy to access (by plane, car or train)
- It has beautiful natural landscapes
- It has beautiful coastline / archipelago
- It has beautiful lake areas with lots of lakes
- The climate is pleasant for summer holidays
- You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.)
- It's a good place to visit all year round
- It's a great place for winter sports/ activities (e.g. skiing, snowboarding)
- It is known for providing/promoting sustainable tourism
- It is easy to access (by plane, car or train)

Survey conducted in the EU. 
Base: Total Sample (1,200)
In your opinion, what is meant by a ‘sustainable travel destination’?

**Sustainable travel destination – OEs**

- One that encourages recycling, uses biodegradable utilities and has a low carbon footprint, and helps out in the local communities.
- A destination that does not get eroded by too many visitors.
- A place where the tourism industry is actively involved in measures to combat climate change and pollution and one that doesn’t require a massive carbon footprint to visit.
- Leave little carbon footprint and contribute to sustainable activities - e.g. recycling, activities that don’t contribute to environmental damage. Be more conscious about our choices of activities. Activities that help sustain the nature.
- A way tourism can be sustained without harming the environment. Not destroying homes of animals or chopping down trees to make pathways or rides for tourists.
- A destination which tries to minimise disruption to nature and manages tourism accordingly.
- Eco friendly, solar panels, reduced energy, using products sourced locally from markets and local shops rather than supply chains.
- Somewhere that is striving to be as environmentally friendly as it can. A place that recognises the negative impact of tourism and seeks to lessen that by using green transport etc. Where the countryside is not damaged or has a chance to recover so not over used, hiked or skied. Where food and drink is locally produced. Where land is not cleared of trees for building to accommodate visitors.
- A destination that limits the number of tourists and of activities the tourists can carry out there to preserve the environment.
- Endearring to eat food produced in that country. Travelling by method with the least environmental impact. Spending money on goods services which benefit local communities.
- A destination that is taking all the steps it can to provide a clean, green and environmentally ecosystem.
Activity Associations
In terms of activities and experiences associated with Finland, Santa and Sleigh rides are strongly linked to Finland in the UK population’s minds.
Whilst not very well know, Moomins are also correctly linked to Finland. The pure nature and clean air is a clear association with all Nordic countries.

**Activities Associations**

- **Denmark**
- **Iceland**
- **Sweden**
- **Norway**
- **Finland**

- **Cottage and villa retreats**
- **Experiencing indigenous cultures**
- **Cultural festivals and events**
- **Island hopping**
- **Pure nature and clean air**
- **Visiting lakes/ lake cruises**
- **Visiting national parks**
- **Enjoy culinary experiences**
- **Heritage sites and museums**

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**Q15 ACTIVITIES ASSOCIATION**

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

Base: Total Sample (1,200)
How are people visiting us?
The UK population most prefer City breaks, Cultural and Beach holidays when they travel abroad.
There is an opportunity to push and promote the possibilities of City breaks with a Finnish twist to the UK population, as other Nordic countries currently hold an advantage here. Finland is currently on par with its Nordic neighbours in terms of Cultural holidays.

**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>City breaks</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
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<tr>
<td>Shopping trips</td>
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<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Cruises</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Immersing yourself in local culture</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Tours to multiple cities/locations within a country</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Tours to multiple countries in a region</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
<tr>
<td>Luxury travel</td>
<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
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<td><img src="finswdenmark" alt="" /></td>
<td><img src="finswdenmark" alt="" /></td>
</tr>
</tbody>
</table>
There is a clear Finnish advantage for winter holidays but some room to improve in terms of relaxation and wellbeing where both Sweden and Iceland hold strong advantages.
The majority of people in the UK who are considering visiting the Nordic countries plan and make the bookings themselves.

**Trip Arranging**

<table>
<thead>
<tr>
<th></th>
<th>Myself</th>
<th>Tour operator</th>
<th>Ready-made package</th>
<th>Mix - myself and tour operator</th>
<th>Other</th>
<th>None of these</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>58%</td>
<td>7%</td>
<td>14%</td>
<td>18%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Book trip myself**

- **Sweden**: 60%
- **Denmark**: 59%
- **Norway**: 55%
- **Iceland**: 53%

Base: Consideration Set: Finland (809), Sweden (766), Denmark (705), Norway (774), Iceland (765)

Q11 TRIP ARRANGING

You said that you would consider a holiday or short break to the destinations below, how would you like to arrange your trip there?
A majority of people in the UK have been on a long international trip in the last year. Those from London are more likely to have been on a short international break in the last year.

**Past Year Holiday**

- A short break within your country of 1-4 nights away: 70%
- An international holiday of 5 nights or more away: 58%
- An international short break of 1-4 nights away: 44%
- A holiday within your country of 5 nights or more away: 37%
- None of these: 5%

Base: Total Sample (1,200)
Most people in the UK travel with their Spouse or Partner.

<table>
<thead>
<tr>
<th>Travel Companion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>With spouse / partner</td>
<td>64%</td>
</tr>
<tr>
<td>With young family aged 16 or under (e.g. children, grandchildren)</td>
<td>22%</td>
</tr>
<tr>
<td>With adult family aged 17+ (e.g. parent, sister)</td>
<td>22%</td>
</tr>
<tr>
<td>With adult friend(s) aged 17+</td>
<td>19%</td>
</tr>
<tr>
<td>No-one, I travel alone</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>With a school, college or study group</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,200)
Summary and Final Thoughts

- Consideration of Finland as a travel destination falls behind other Nordics. Building awareness of Finland and making the destination stand out is needed.

- Without prompting, Finland is associated particularly with lakes, forest, Lapland and winter festivities, however unique associations in other countries are stronger.

- As a market, the UK are particularly keen on city breaks, as well as culture. We already see many positive spontaneous associations around culture, shopping and food in Helsinki amongst those aware, so continue promoting these aspects and pushing city breaks in Helsinki.

- Activity strengths are on Christmas and winter themes, if you are focused on making it an all year round destination, there’s more work to be done here, as Christmas is really your strength and UK tourists struggle to understand what else is on offer.

- Given accessibility is more of a barrier compared to places like Denmark, consider comms highlighting ease of travel and low-cost flights, as well as the opportunities for short city breaks in Helsinki.
Visit Finland