



Visit Finland Brand Tracking 2019

Ipsos Presentation
12th December 2019

Agenda



Part 1:

Presentation

We will now take you through the **key global results** from the tracker, looking at **consideration** and **perceptions** of Finland has a holiday destination

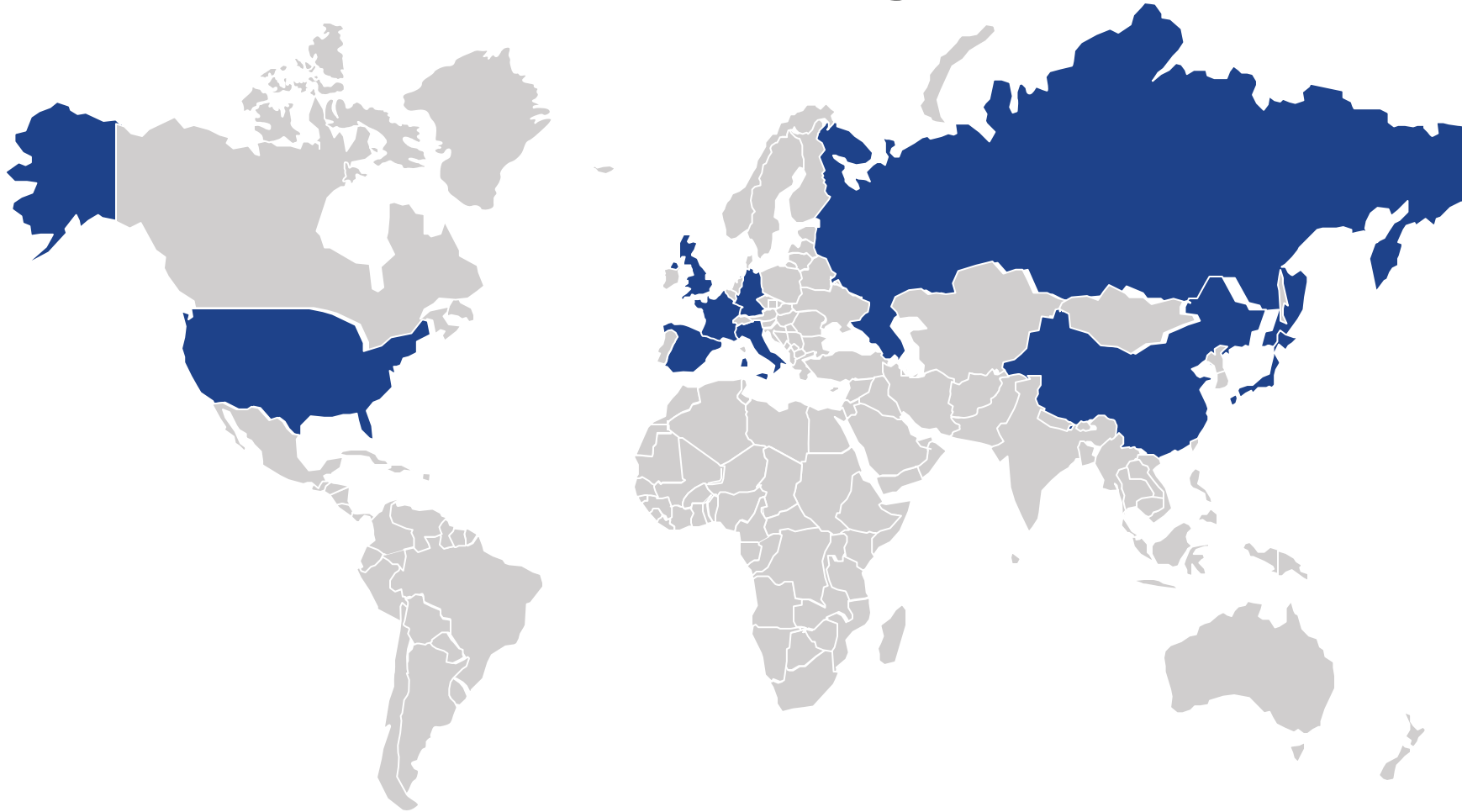


Part 2:

Question & Answer session

Later today / tomorrow we will run a series of **workshops** for each region, where we will be going into more detail on individual markets, answering any questions you may have on the **country packs**

Which markets are we looking at?



- ❖ **UK**- National representation + London boost
- ❖ **France**- National representation + Paris boost
- ❖ **Germany**- National representation
- ❖ **Spain**- Madrid, Barcelona

- ❖ **Italy**- Lombardia Veneto Lazio
- ❖ **Russia**- Moscow area, St. Petersburg, Vyborg and Leningrad Oblast
- ❖ **US**- California, Colorado, New York, Oregon, Washington, New England

- ❖ **China**- Beijing, Shanghai, Guangzhou
- ❖ **Hong Kong** - Hong Kong Island, Kowloon, New Territories
- ❖ **Japan**- Tokyo, Osaka, Nagoya

Methodology



Fieldwork was carried out online for all markets; taking around 14 minutes to complete.



A sample size of $n=1,000$ was collected for all markets (1,200 in Russia), with specific regional samples in some markets for a more precise picture of travel demand, and boosts for some capital regions.



Target audiences/subgroups were captured, to provide more targeted reads on particular groups. A representative split of age groups and gender was collected.

Who did we talk to?

Fieldwork took place from
5th September – 3rd October 2019



Europe

Males & Females

18-65 years

Planning holiday to **Northern Europe** in next 3 years



China (inc Hong Kong)

Males & Females

18-65 years

Planning holiday to **Europe**
in next 3 years



Japan

Males & Females

18-65 years

Planning holiday to **Europe**
in next 3 years



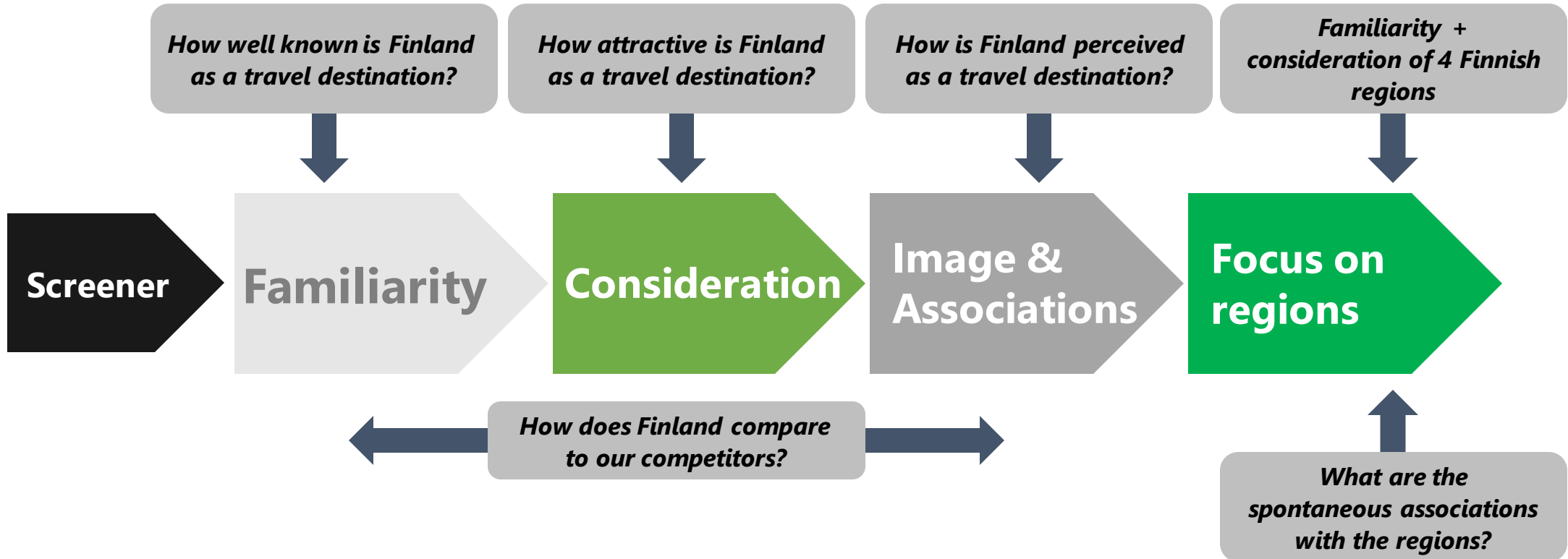
US

Males & Females

18-65 years

Planning holiday to **Europe**
in next 3 years

What did we ask them?

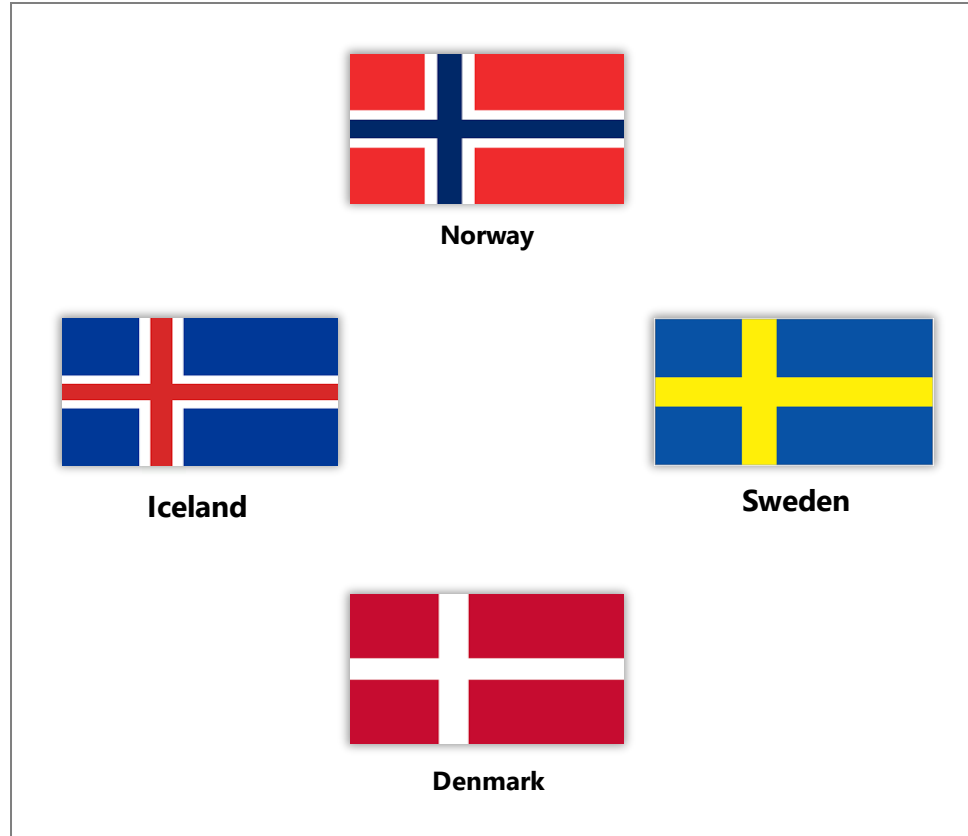


Who are we comparing ourselves against?

To see where we stand in a competitive context, we asked all questions for the following destinations...



Vs.



What has changed since 2015 research and how can we compare?

- ❖ We have a new age range: *18-65 across all the markets*. Previously, we interviewed 20-70y in Europe, 30-50y in China and Hong Kong, and 20-50y in Japan
- ❖ We no longer require European markets to be *Modern Humanists*
- ❖ The holiday screener for Europe is now '*Planning holiday to Northern Europe in next 3 years*' instead of 'Holiday abroad at least once a year' – allowing for more Nordic focused travellers in Europe
- ❖ We have included two new markets: *US & Spain*
- ❖ We have interviewed travellers in different cities/regions compared to 2015 research
- ❖ We have removed Estonia from the core competitor set, and replaced with Denmark.

What does this mean? – like for like comparison to 2015 needs caution! Rather than comparing % scores we look at differences in rank

What did we say last time?

- ❖ Finland has some positive associations, although varied somewhat from country-to-country
- ❖ The biggest challenge for Finland is that it is relatively undistinguished from its Nordic competitors, except in Russia. It is difficult to shift perceptions vs. competitors like Sweden who have much larger budgets

Our recommendation:

1. **Be focused and consistent** – Build strong familiarity with one or two unique aspects to “hook” a potential traveller and gain their interest
2. **Be unique** – Carve out a distinctive profile for Finland
3. **Be Finnish** – Make communications stand out as being distinctive to differentiate from similar competitor offerings

Summary – 2019 research

- ❖ Consideration of Finland as a holiday destination is strong in Russia, China and Japan but in the US and in the European markets, Finland falls behind its Nordic neighbours.
- ❖ Spontaneously, Finland is strongly associated with 'Snow' and 'Frozen landscapes' but these associations are shared with the other Nordic countries too. Unique associations are more related to Lakes, Forests and seasonal Christmas elements.
- ❖ Perceptions around culture are currently not very strong for Finland. Denmark and Sweden lead the way here.
- ❖ Sustainable tourism isn't really an area which any of the Nordic markets own yet. More is probably needed to educate and grow awareness of these initiatives.
- ❖ In Europe, Lapland and Helsinki are the best known Finnish regions. In the long haul markets like China and US, Lapland is less well known but awareness of Helsinki is still strong.

Consideration of Finland as a holiday destination



Visit Finland



Ipsos

We asked respondents to spontaneously share the destinations they would consider for a holiday over the next three years..



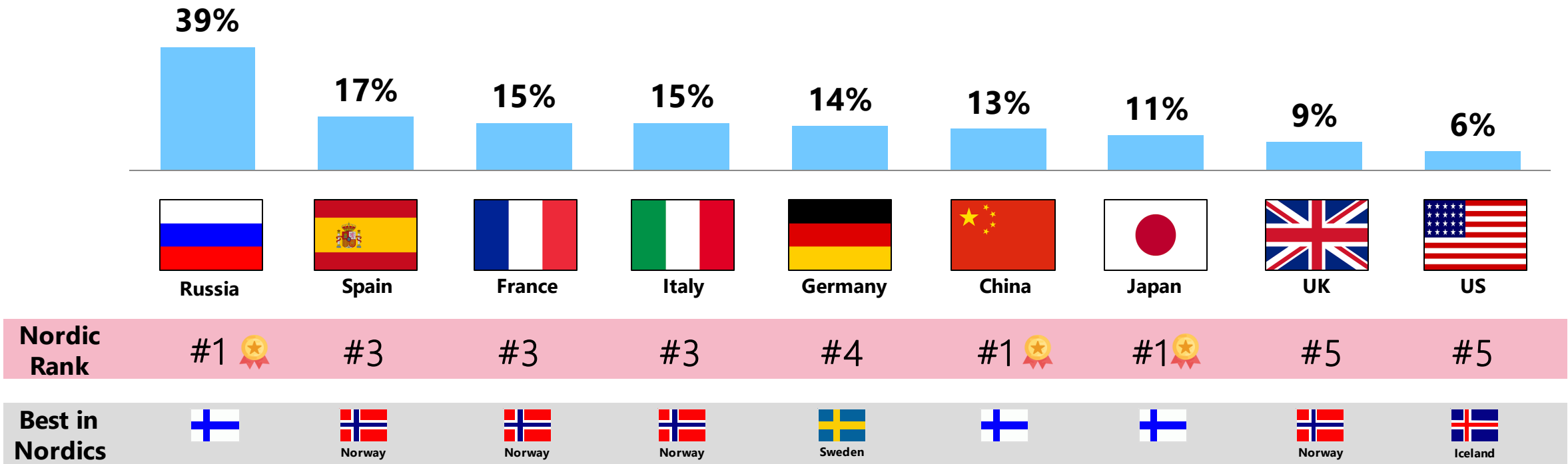
Why is this important?

- ❖ It is essential to be top of travellers' minds when they are thinking about their next holiday destination.
- ❖ Coming to mind spontaneously and ranking high in consideration set is key to compete with other destinations

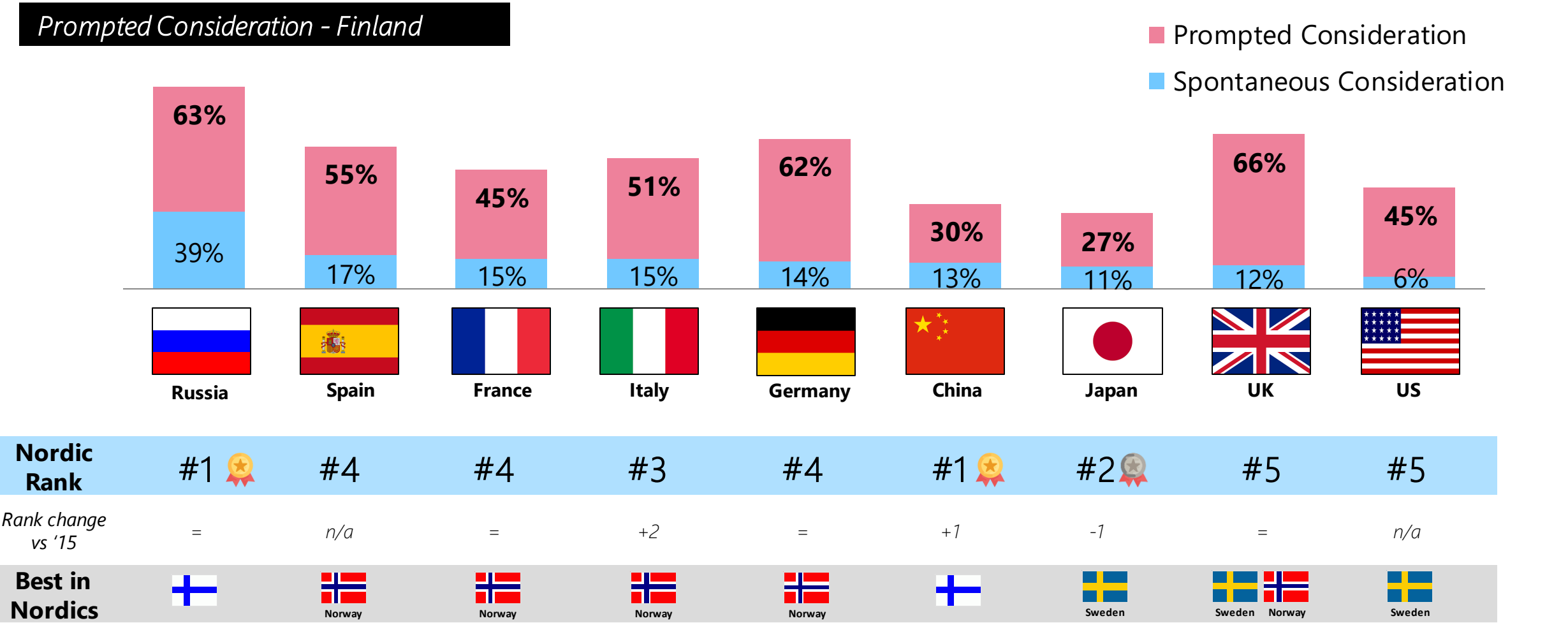


Finland is top of mind as a holiday destination in Russia, China and Japan but falls behind its Nordic competitors in the other markets. Norway has a strong presence in Europe

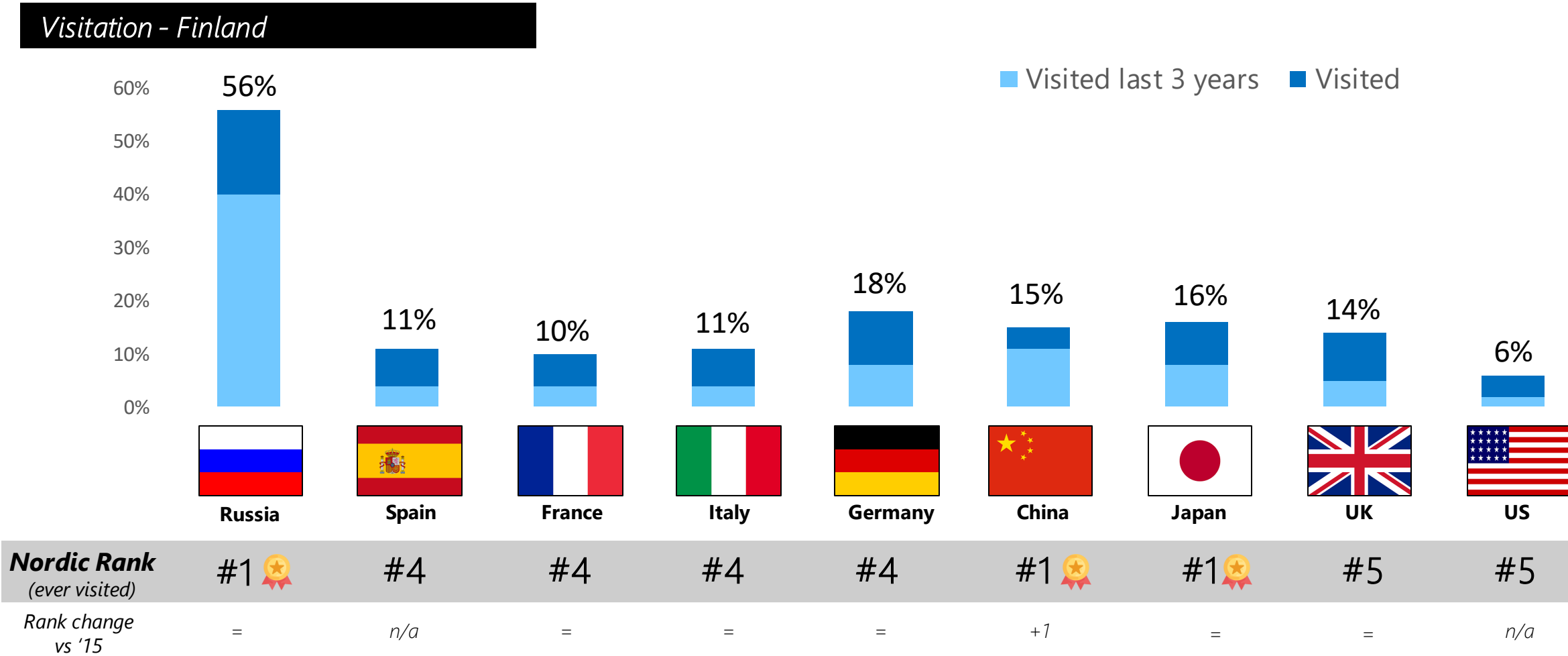
Spontaneous Destination Consideration - Finland



A fairly similar picture when prompted with a list of possible destinations. Though lower consideration scores in China and Japan, the proportion of spontaneous consideration is high which is a strong positive in these markets

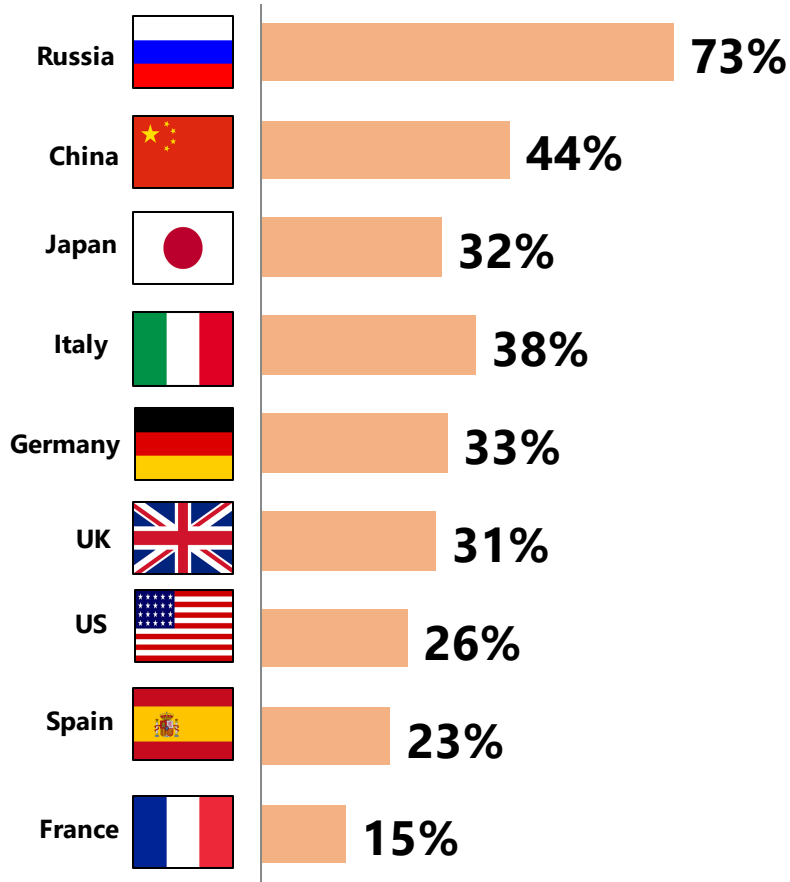


In line with consideration, Finland is also seeing strongest claimed visits amongst the Nordics in Russia, China and Japan






In the countries where consideration is ranked the best, we see some of the highest levels of claimed knowledge – highlighting the need to grow knowledge about Finland as a holiday destination

Destination Knowledge*



Nordic Rank

#1	
#1	
#1	
#4	
#5	
#5	
#5	
#5	
#5	
#4	

Consideration Rank

#1
#1
#2
#3
#4
#5
#5
#3
#3

*A great deal of knowledge/A fair amount of knowledge about destination

A photograph of a forest at sunset. The sun is low on the horizon, creating a warm, golden glow that filters through the tall, thin trees. A person wearing a bright yellow jacket is walking away from the camera on a path that leads into the distance. The ground is covered in green moss and low-lying vegetation. The overall atmosphere is peaceful and scenic.

**What comes to mind when thinking
about Finland as a holiday
destination?**

We asked respondents to spontaneously share what comes to mind when they think of **Finland** as a travel destination...



Why is this important?

- ❖ We want to understand travellers' mental networks when they think about Finland. What associations do they have and how strong are they?

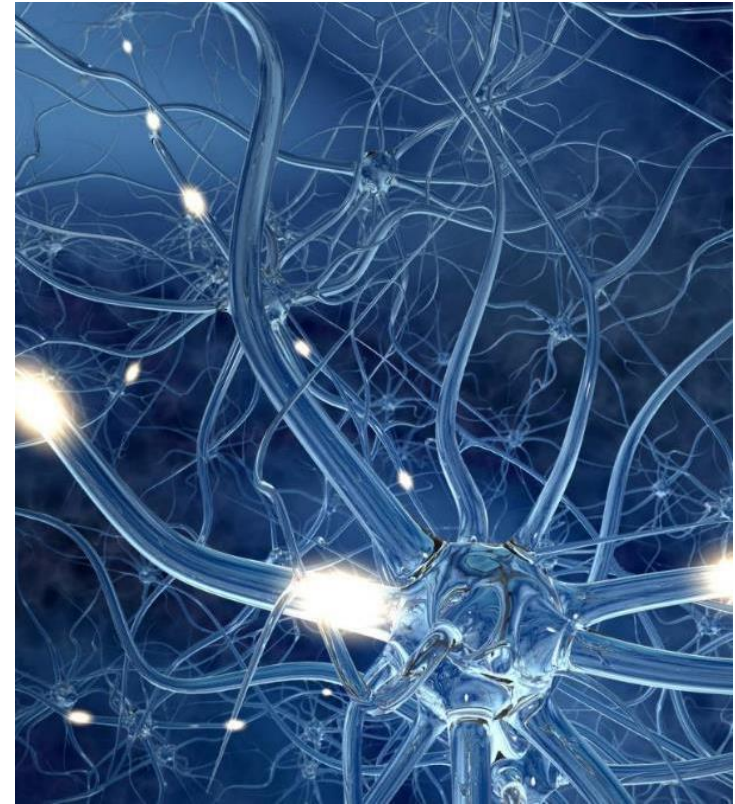
In Germany and the UK, we conducted
this using a new technique called
Mental Network Analysis



UK



Germany



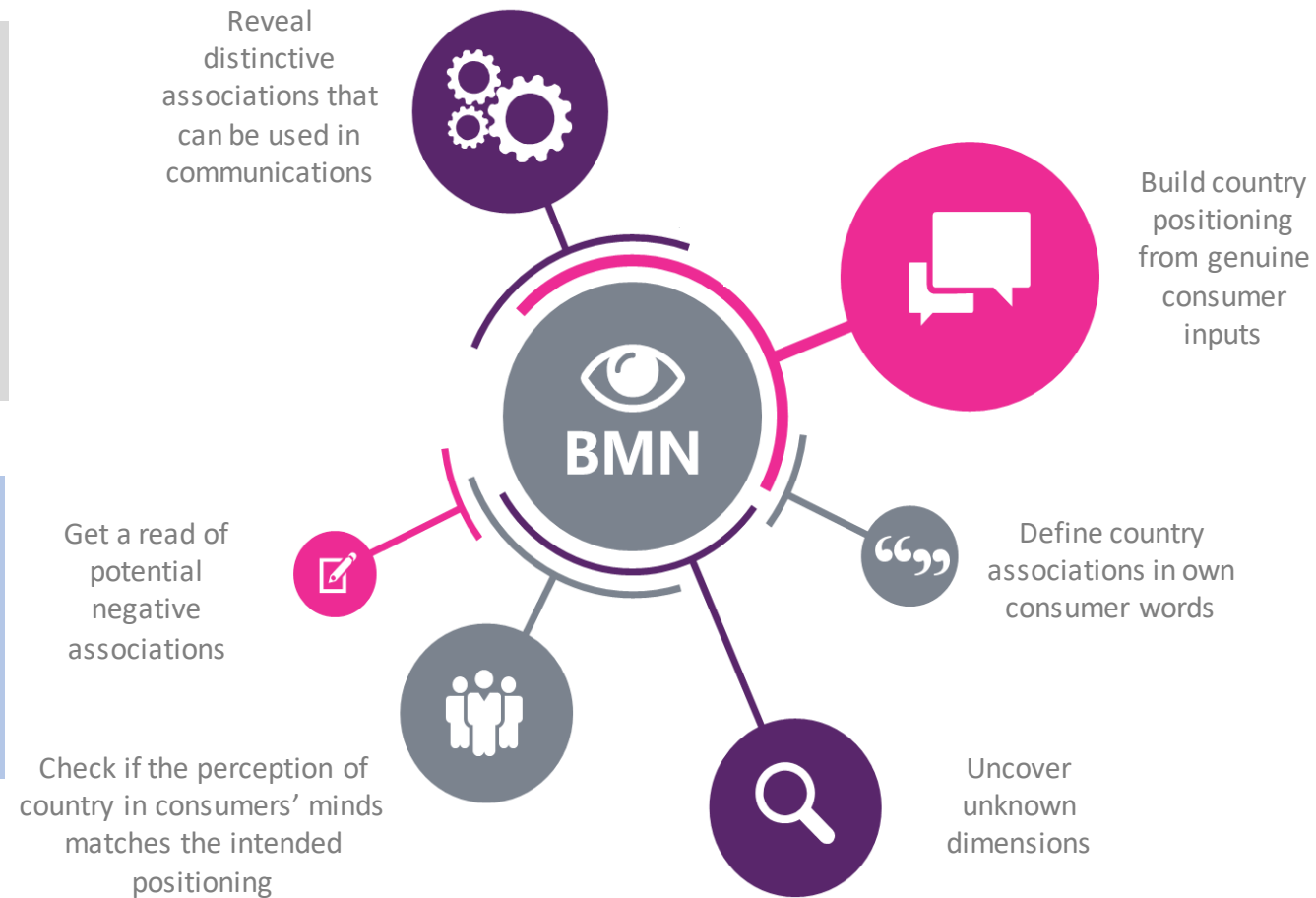
Mental Network Analysis: discover what is truly associated with Finland

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



How to read the mental network map?

STRENGTH

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

RICHNESS

Each **bubble represents a theme/association**.

- The more the number of brand associations, the more the number of bubbles in the map.

CONNECTEDNESS

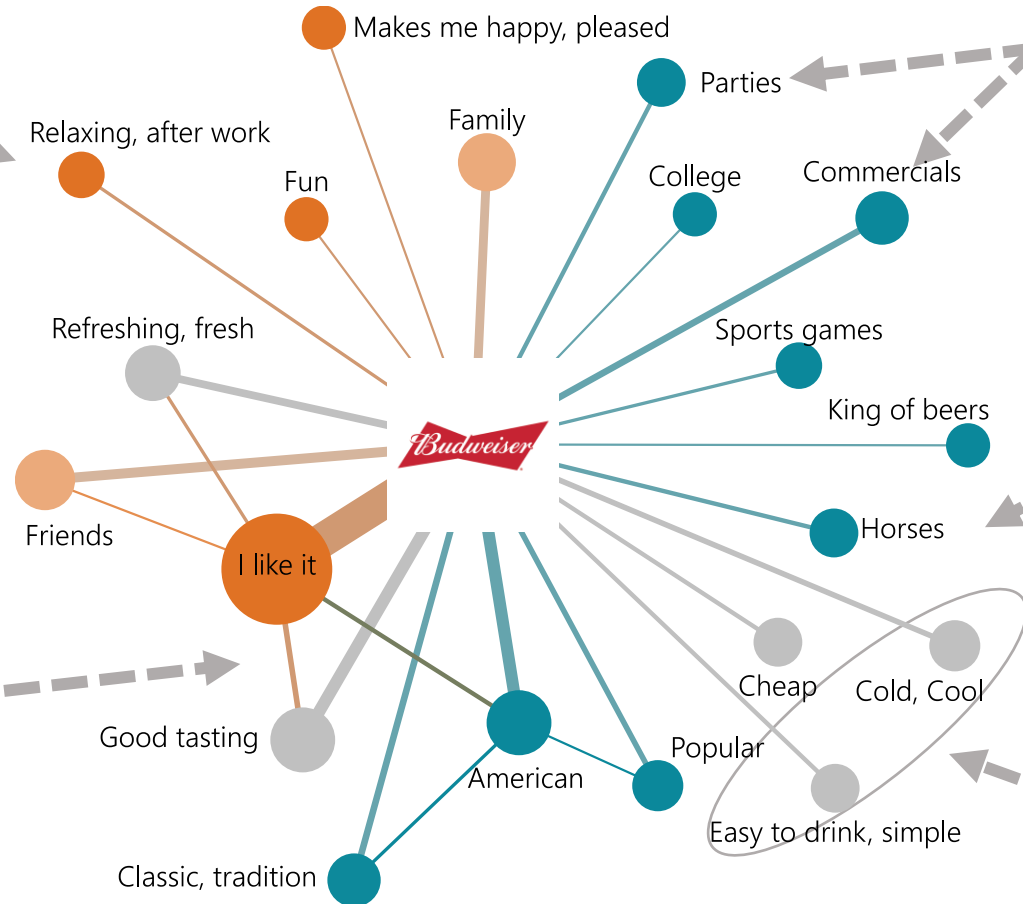
Inter-connections between bubbles. **represent co-occurrences of mentions of a theme:**

- These are themes / associations that respondents mentally link together.

Color coding represents groupings of themes, which can be based on various things:

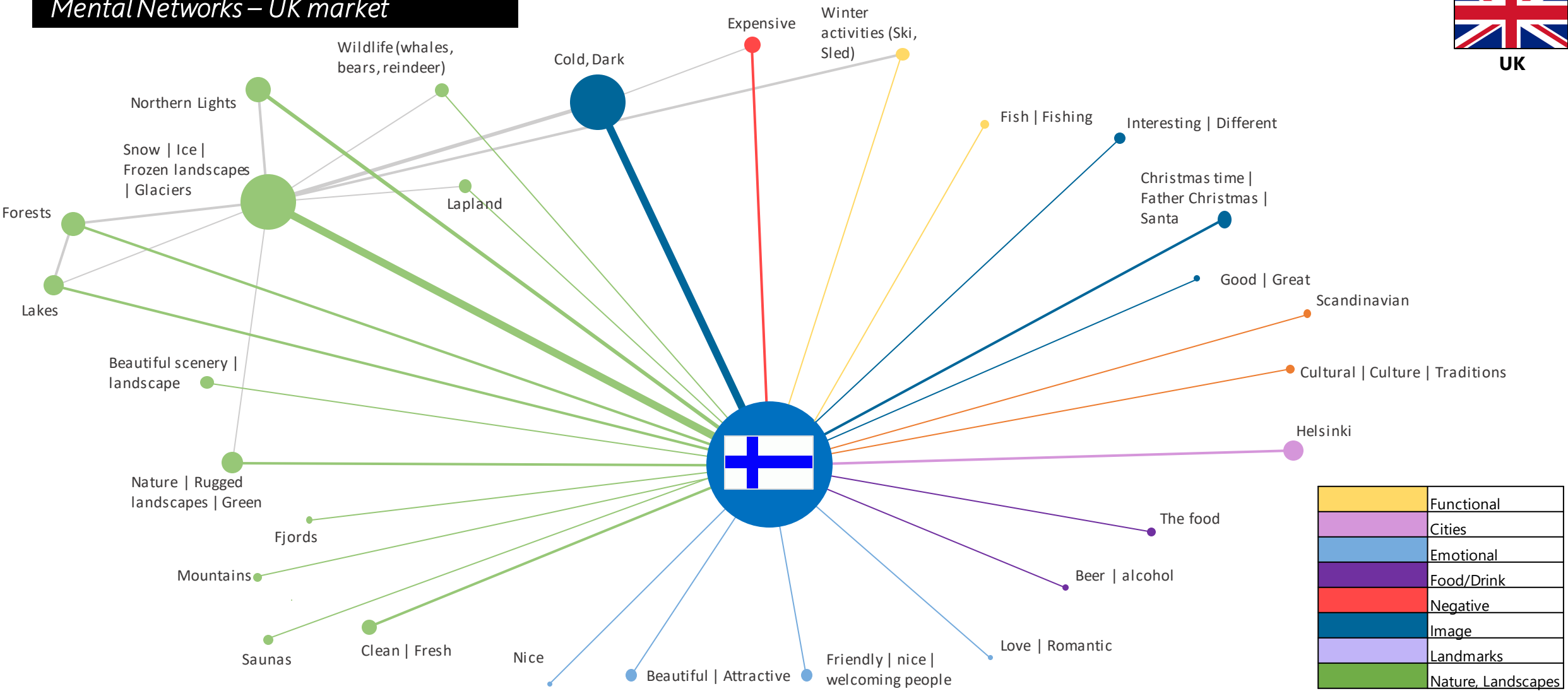
- Sentiment (positive, negative)
- Other groupings (e.g. product related themes vs contextual themes vs emotion themes)

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

Mental Networks – UK market



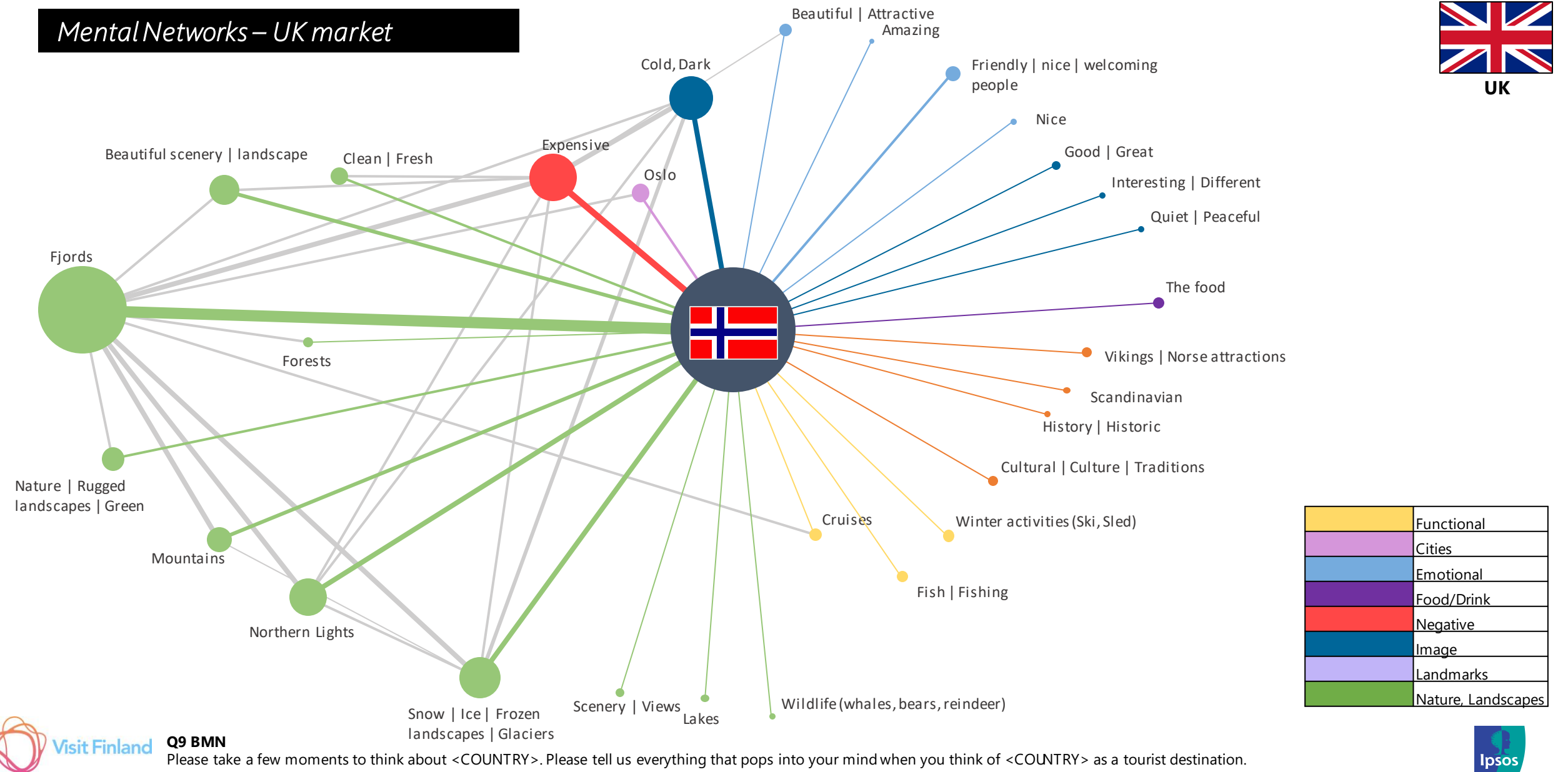
Q9 BMN

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.



Looking at the most considered Nordic destination in the UK (Norway), we see stronger associations and more connectedness between the themes resulting in a stronger network

Mental Networks – UK market

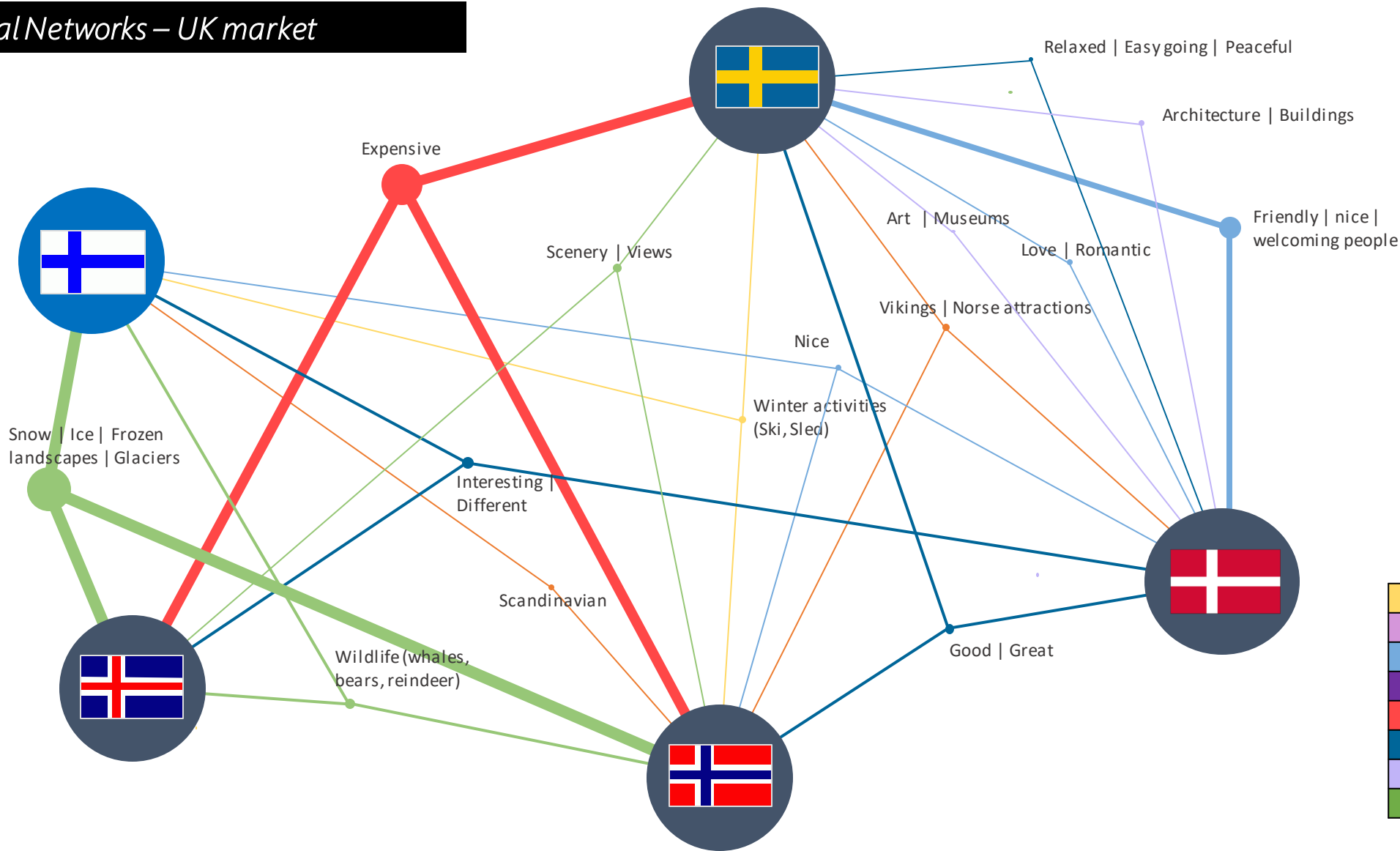


Q9 BMN
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.



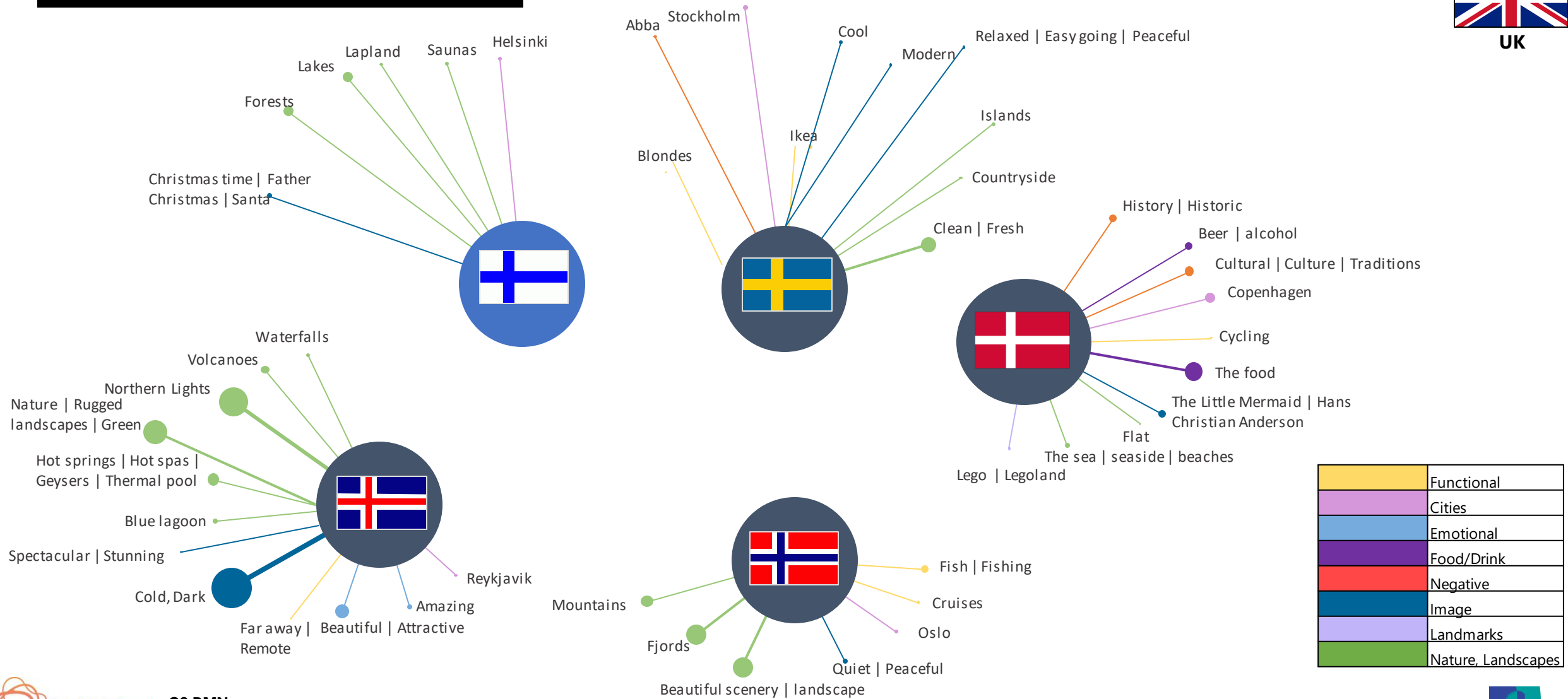
Viewing the shared associations between the Nordics, Finland, Iceland and Norway share the theme for snow, but Finland avoids being labelled as expensive like other destinations.

Mental Networks – UK market



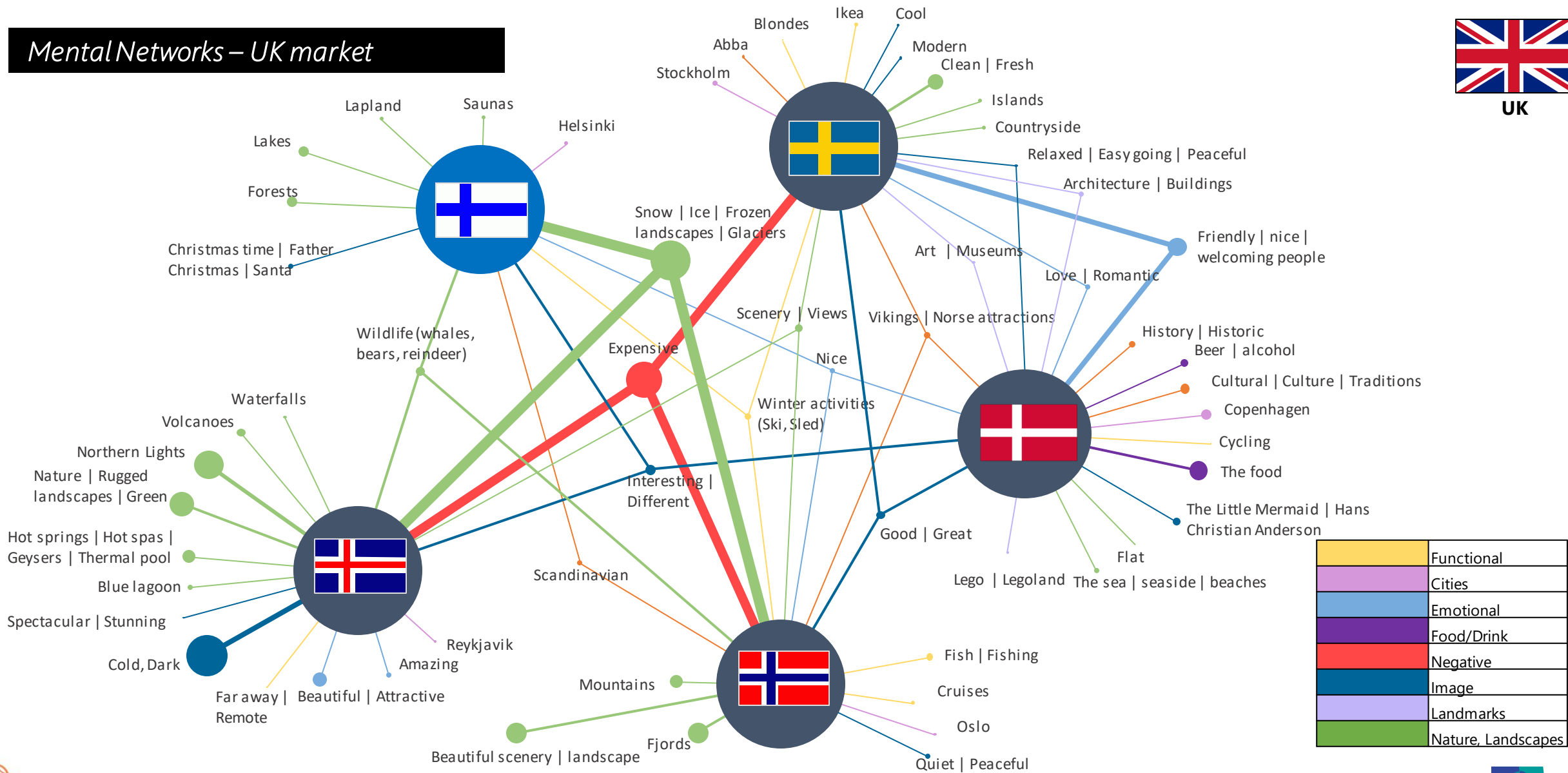
If we look specifically at areas of distinction, the more generic 'nature' association is more linked to Iceland where as Finland hold smaller associations to Lakes and Forest and seasonal elements

Mental Networks – UK market



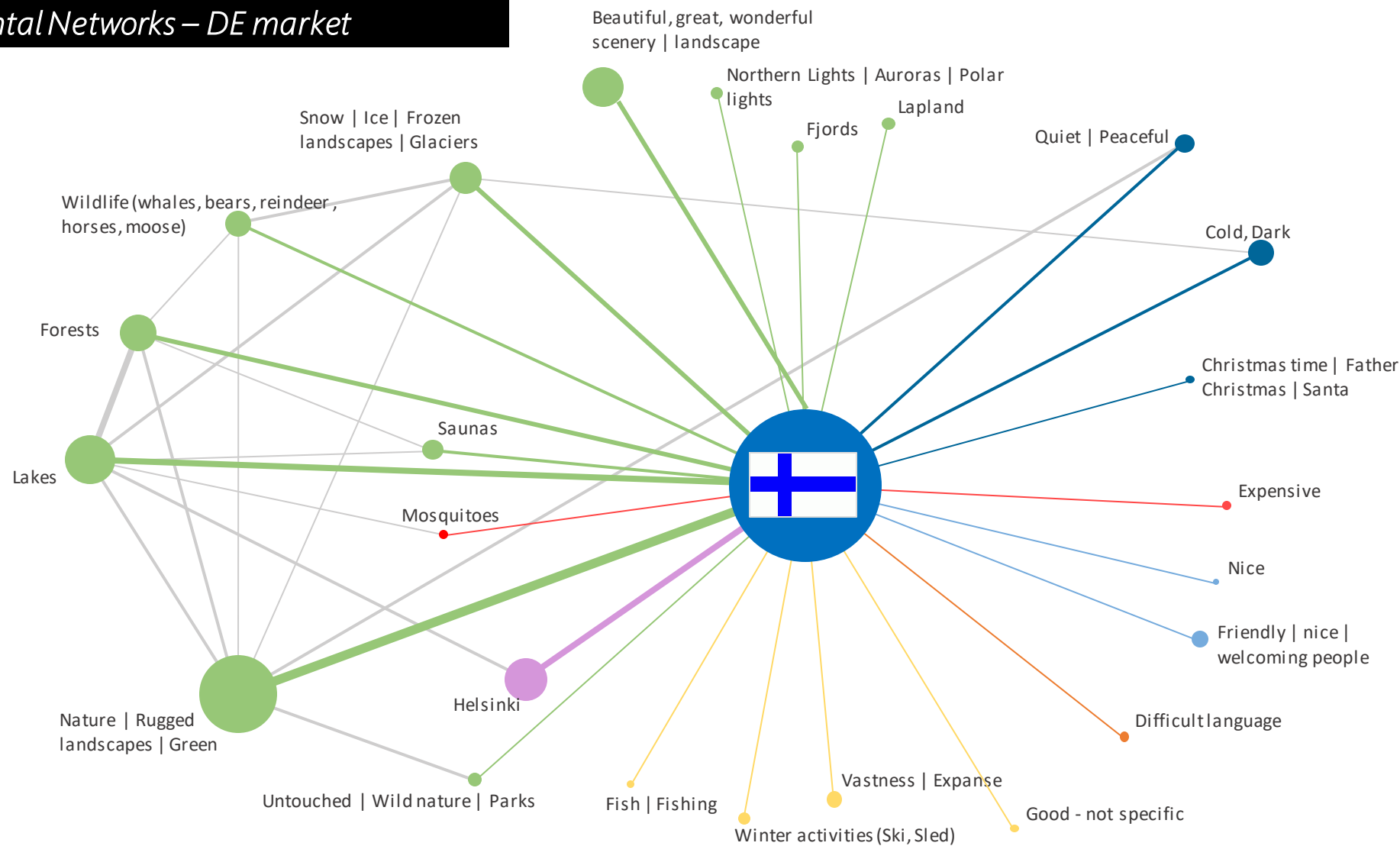
Combined map: the overall picture

Mental Networks – UK market



In Germany, associations are more focused, and nature really stands out, with snow being less of the main focus like in the UK

Mental Networks – DE market



Germany

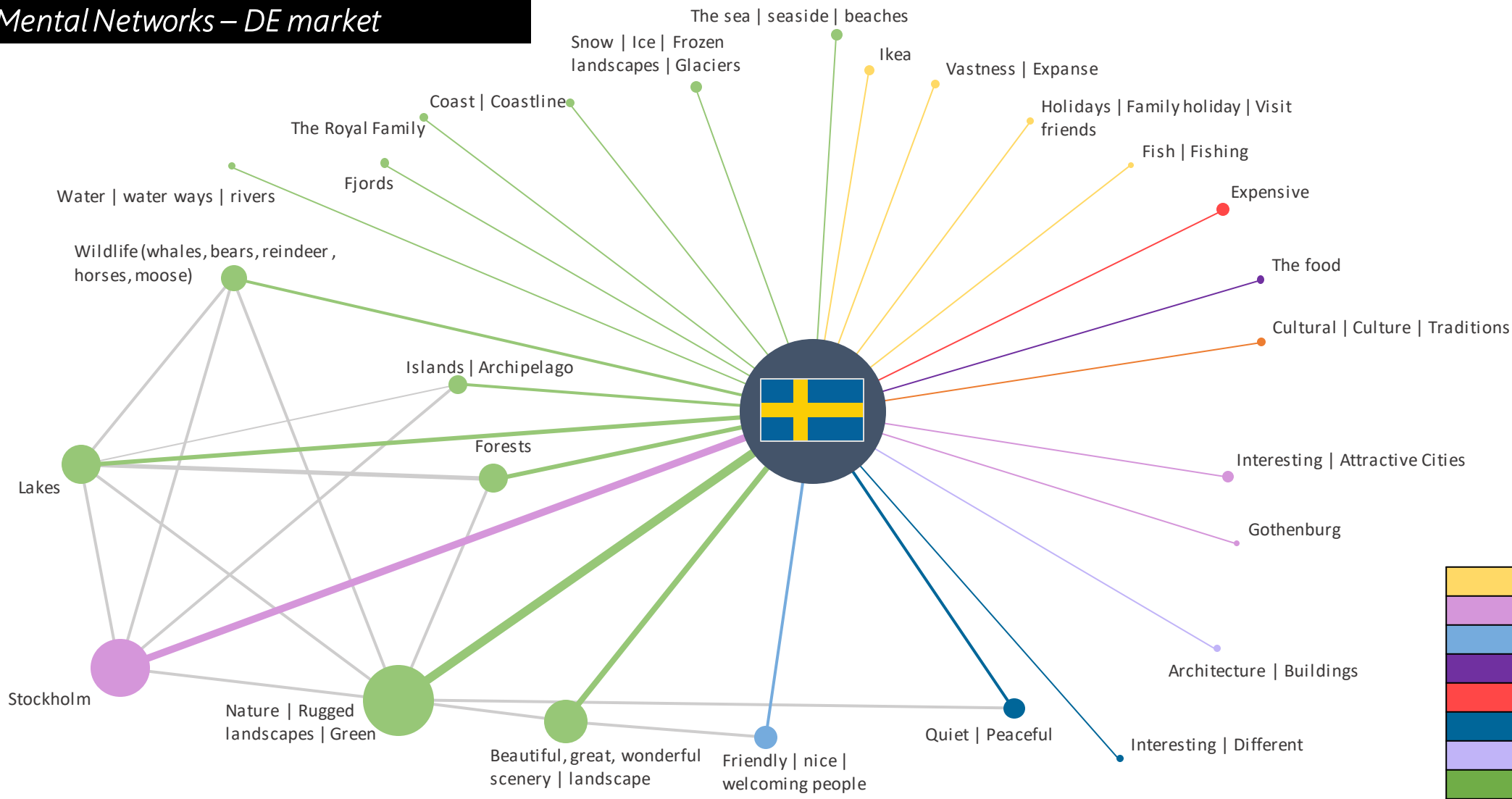
	Functional
	Cities
	Emotional
	Food/Drink
	Negative
	Image
	Landmarks
	Nature, Landscapes

For Germany's top of mind Nordic destination (Sweden), nature is strong too but Stockholm really comes to mind well

Mental Networks – DE market



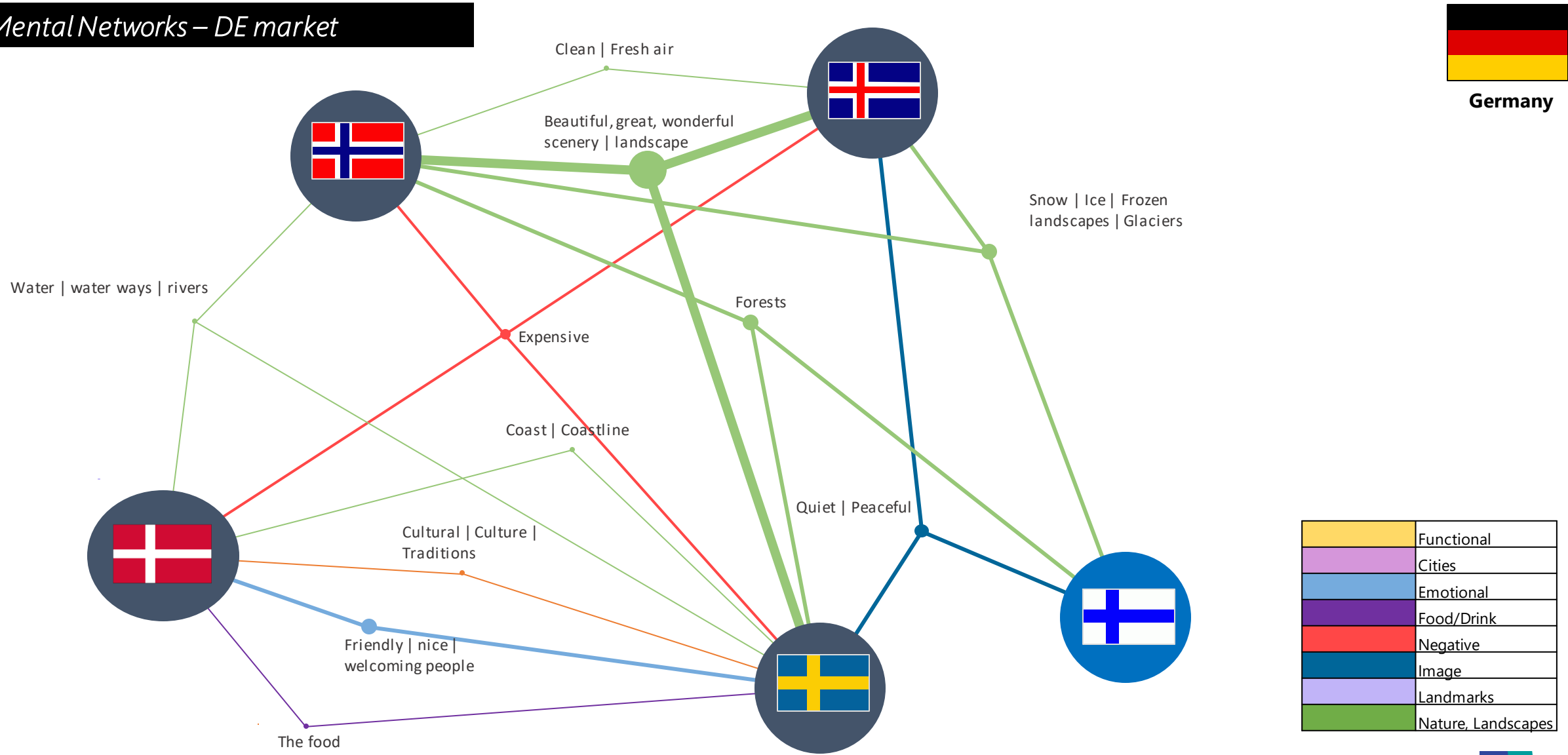
Germany



	Functional
	Cities
	Emotional
	Food/Drink
	Negative
	Image
	Landmarks
	Nature, Landscapes

Finland share less association with its Nordic neighbours. Encouragingly, association with being expensive are not linked to Finland in Germany

Mental Networks – DE market

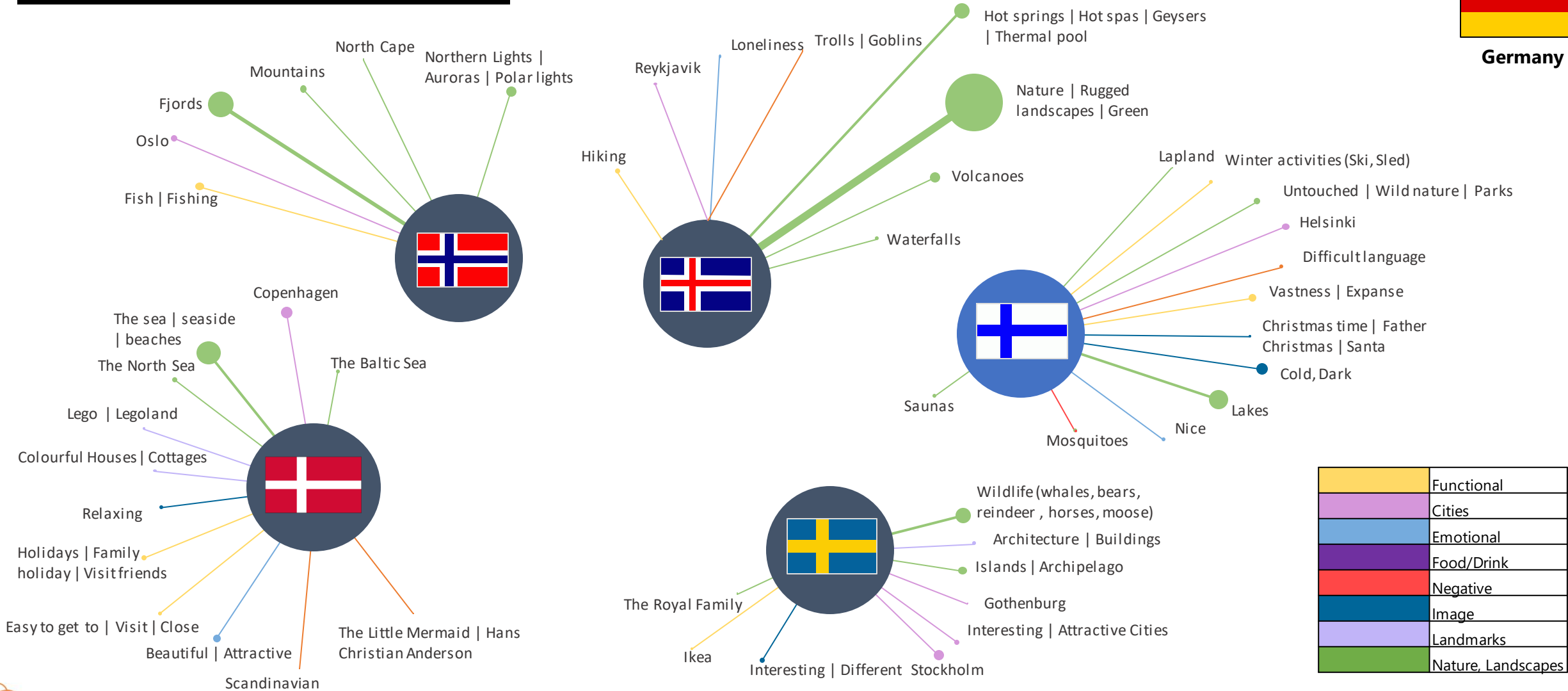


Germany see more unique associations with Finland than the UK. Lakes, Christmas, saunas, Lapland and Helsinki are common themes in the two markets

Mental Networks – DE market



Germany

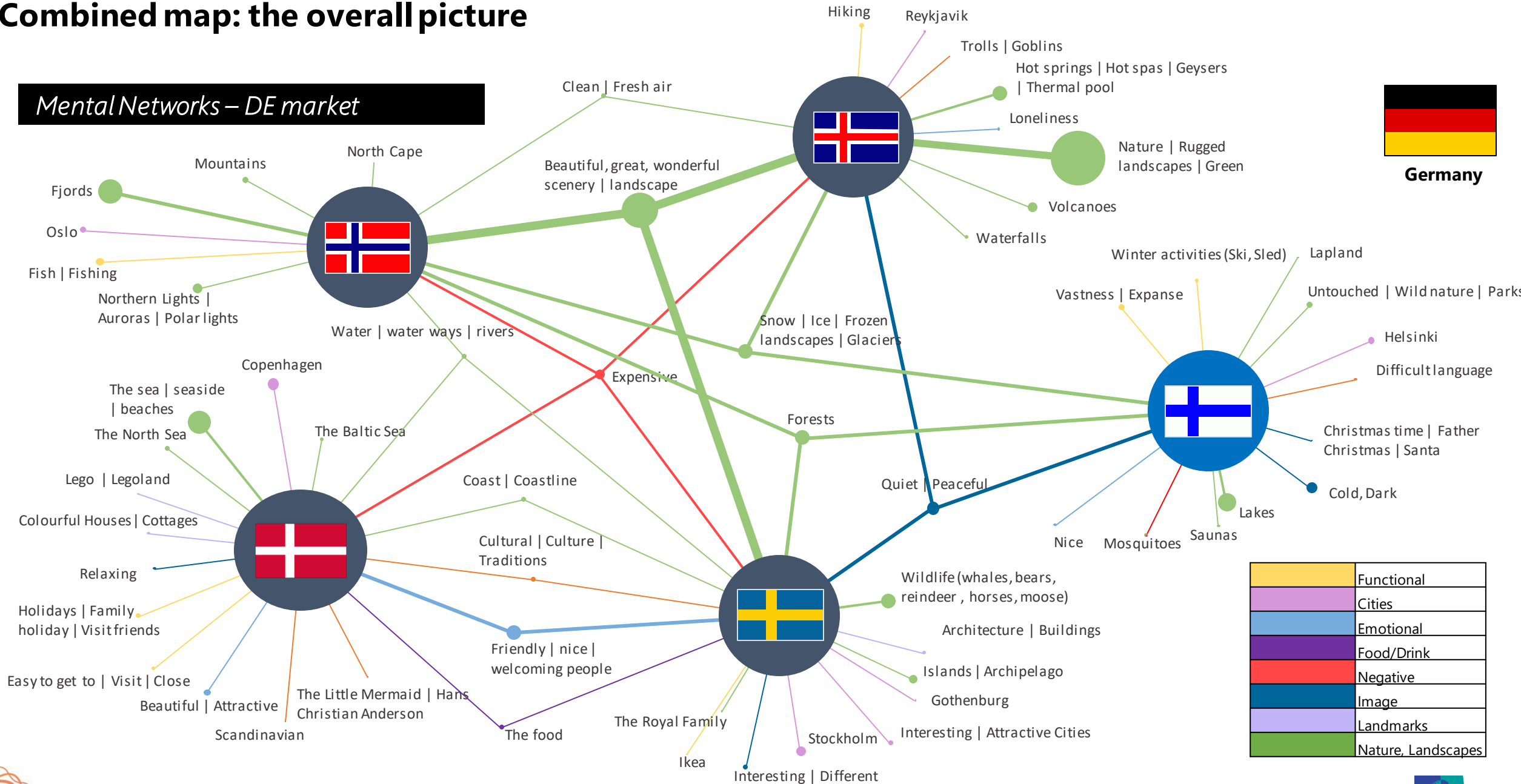


Combined map: the overall picture

Mental Networks – DE market



Germany



What do our other markets think?



Russia



Spain



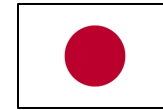
France



Italy



China



Japan



US

Perceptions around nature come through strongly in other European markets.

Spontaneous impressions



Spain



Italy



France

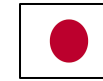


Russia



Beauty and Christmas associations come through more in the long haul markets, with mentions of the Northern Lights. Moomins are a standout in Japan.

Spontaneous impressions



Japan



China



US



A photograph of two women riding yellow bicycles on a cobblestone path next to a harbor. The woman on the left is wearing a patterned jacket and sunglasses, while the woman on the right is wearing a dark puffer jacket. They are both smiling and looking towards the right. The background shows several sailboats in the water, a stone pier, and a city skyline in the distance under a warm, golden sunset sky. The text "What is Finland associated with when prompted?" is overlaid in white on the image.

What is Finland associated with when prompted?



Visit Finland



We have measured imagery associations in the following way...

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

And compared with:



Iceland



Norway



Sweden



Denmark

We then assess the relative strengths of Finland and competitors using **double indexing**. What does this mean?

The absolute size of a thing
(How many people believe something to be true)



OR

The relative distinctiveness of a thing
(To what extent does something stand out given what you are comparing it to)



We have a lot of statements to examine so to make it more manageable we have divided them into the following areas

Nature

*Experiences &
Activities*

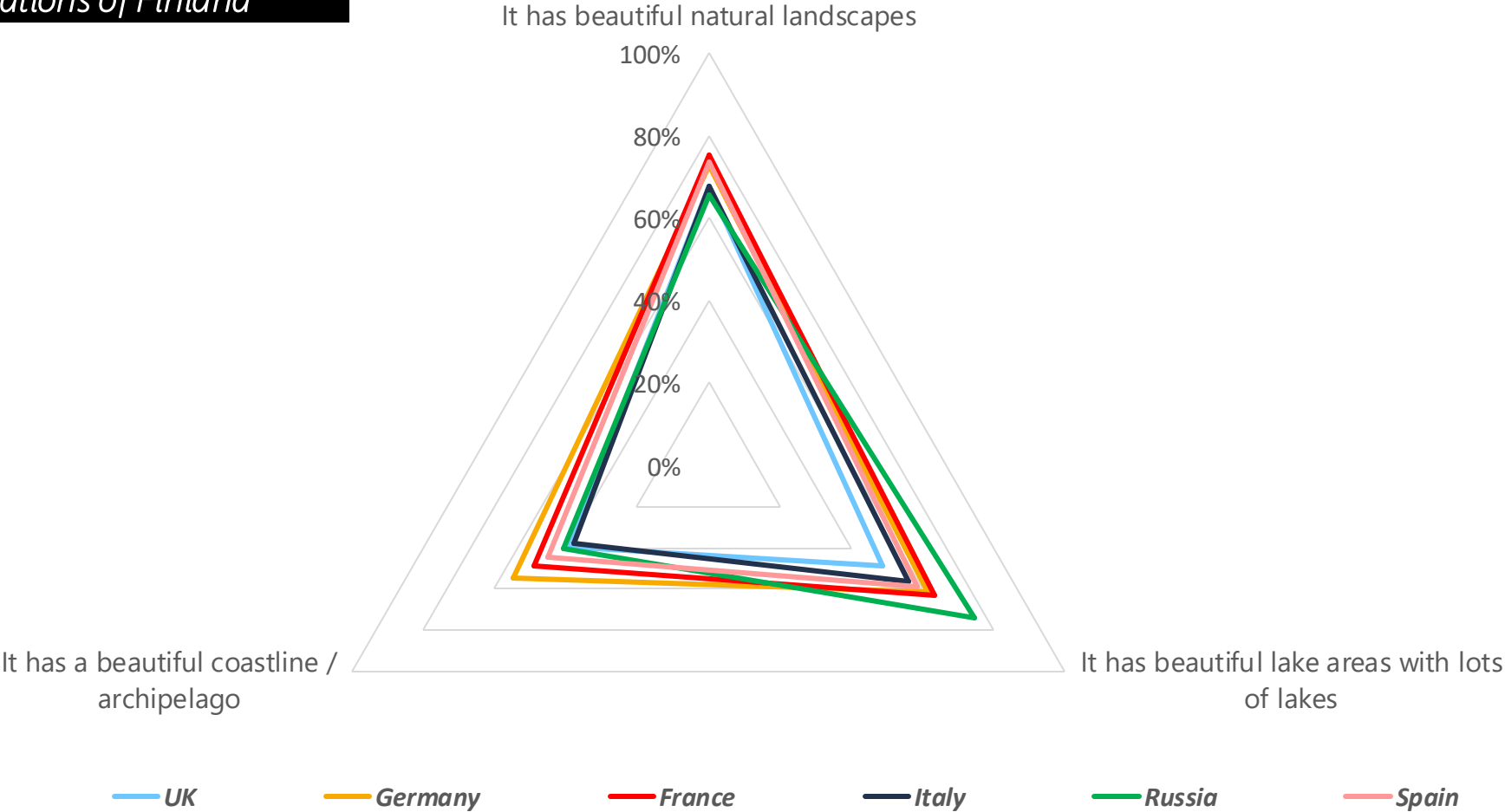
Culture

Sustainable tourism

In terms of nature perceptions there is little differentiation on perceptions of Finland with the European markets. Russia have a stronger take on the beautiful lakes

Image Associations of Finland

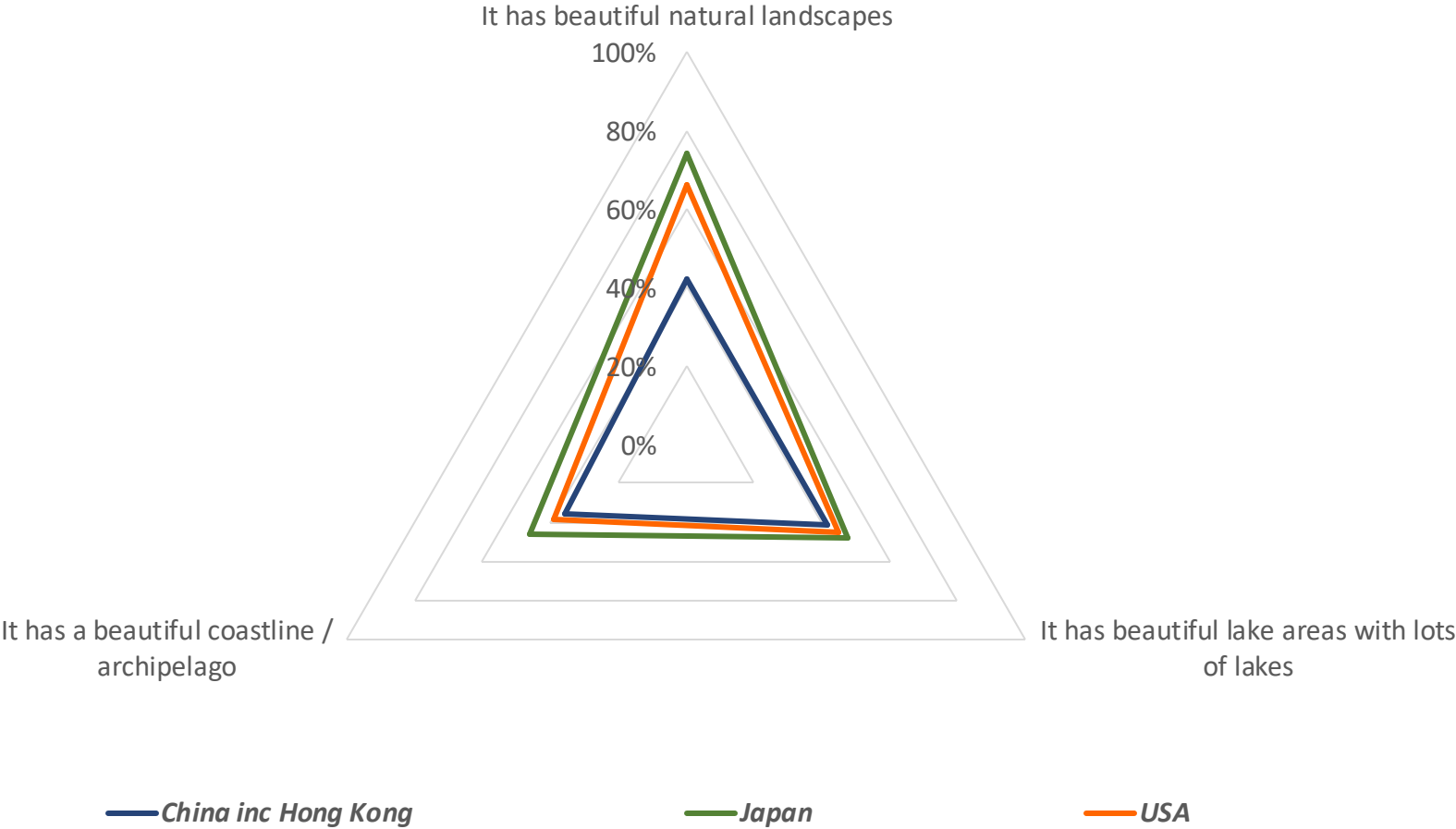
Nature



With our long-haul markets, China stand out in terms of their lower associations on landscapes whilst Japan and the US see fairly similar levels across

Image Associations of Finland

Nature



Looking at the relative strengths, Finland's ownership on beautiful lakes becomes clear

Double indexing - relative strengths

Nature



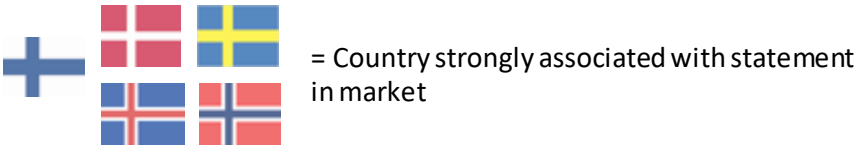
It has beautiful natural **landscapes**



It has a beautiful **coastline** / archipelago



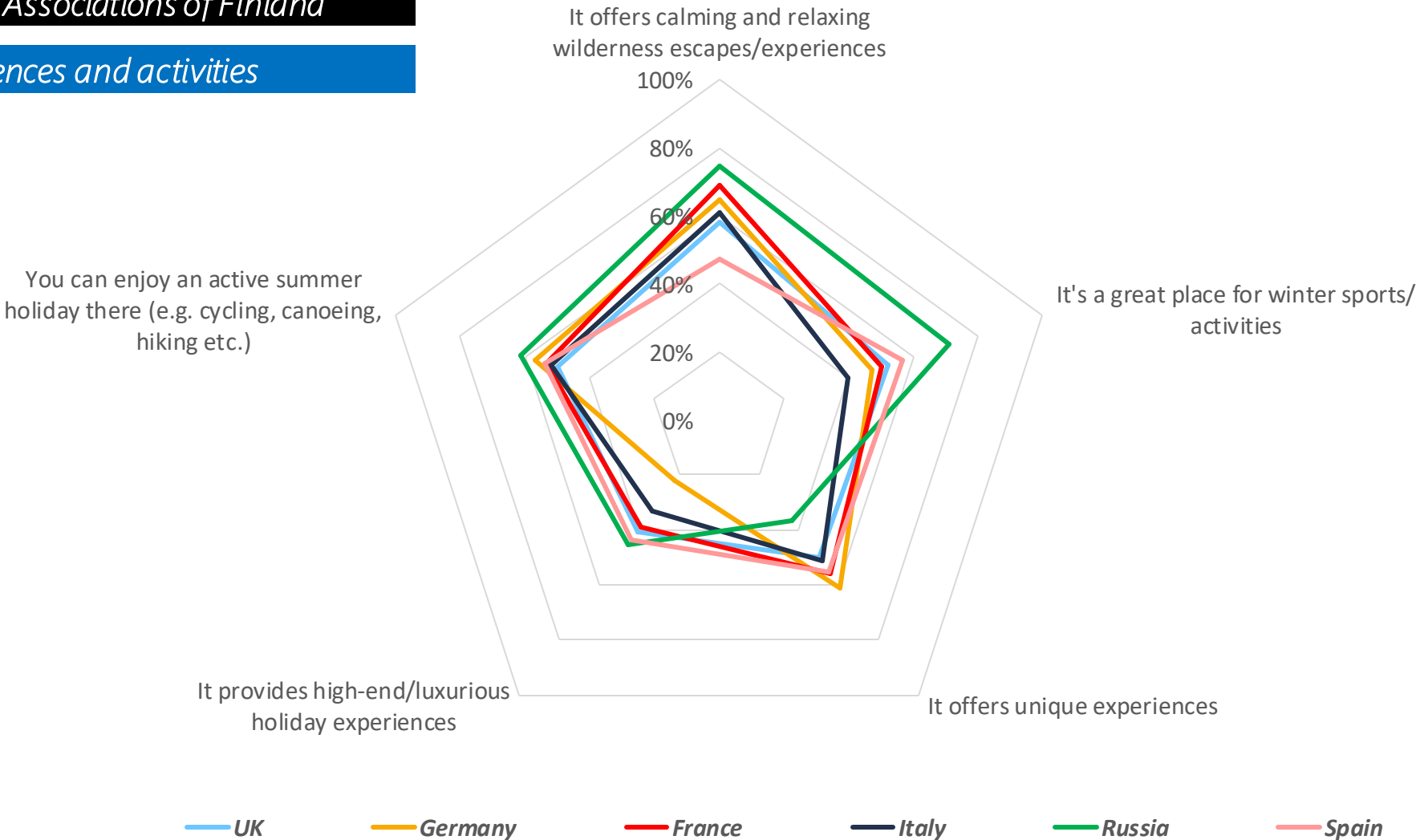
It has beautiful **lake areas** with lots of lakes



Russia's stronger knowledge and consideration of Finland starts coming through when looking at perceptions around experiences and activities. Germany falls back slightly on associations with luxury/high end holidays

Image Associations of Finland

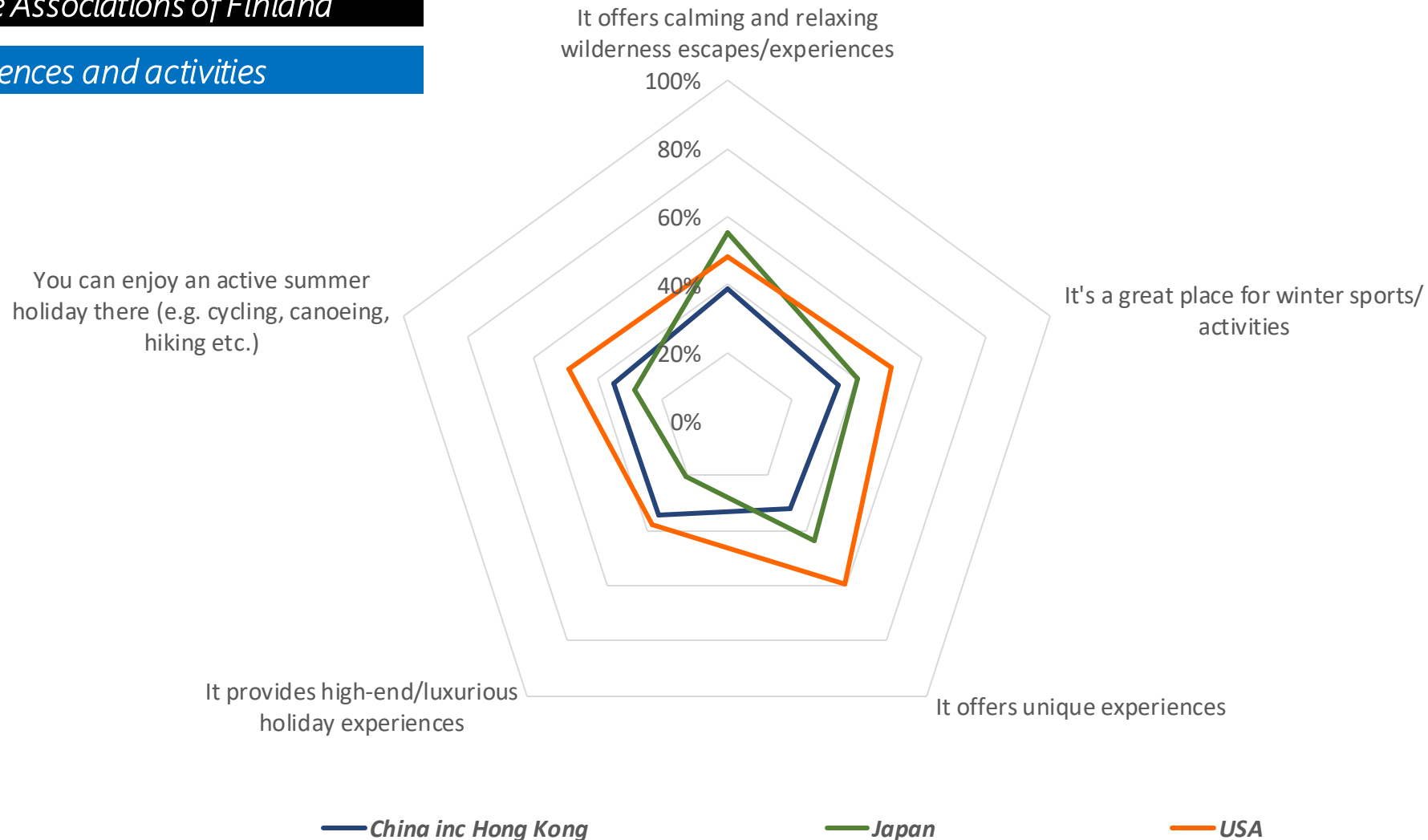
Experiences and activities



More differentiation across the long-haul markets. Japan have strong perceptions around the peace and tranquillity whilst the US market see Finland as having unique experiences to offer

Image Associations of Finland

Experiences and activities



On relative strengths, Norway and Iceland dominate the activity scene, with Iceland seen as offering unique experiences. Finland does also stand out for winter sports in Germany and Russia

Imagery relative strengths

Experiences and activities



Russia



Spain



France



Italy



Germany



China



UK



Japan



US

It offers calming and relaxing **wilderness** escapes/experiences



It's a great place for **winter sports/** activities



It offers **unique** experiences



It provides **high-end/luxurious** holiday experiences



You can enjoy an **active summer** holiday there (e.g. cycling, canoeing, hiking etc.)

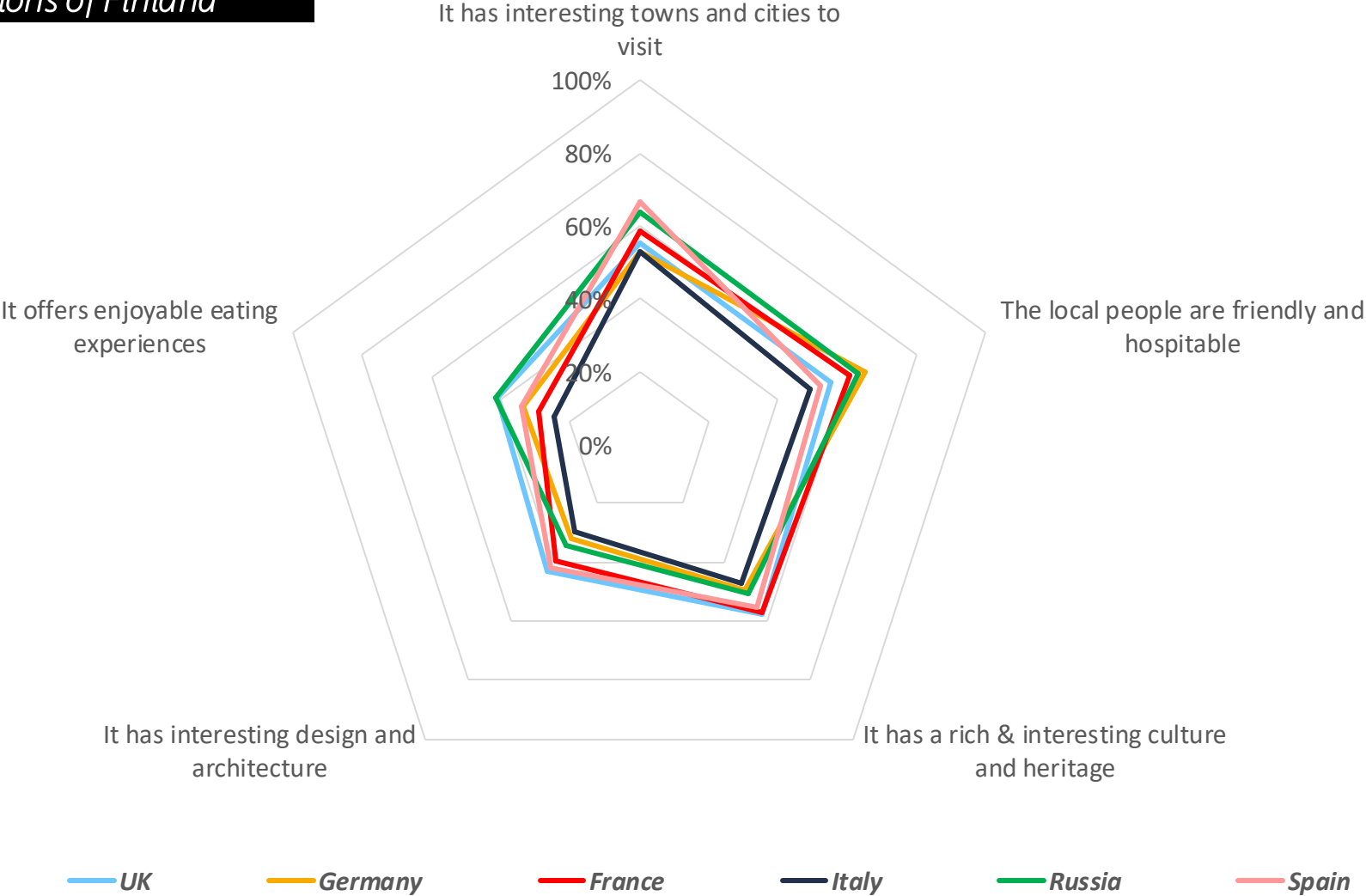


= Country strongly associated with statement in market

Finland is not perceived as well on cultural aspects in Europe

Image Associations of Finland

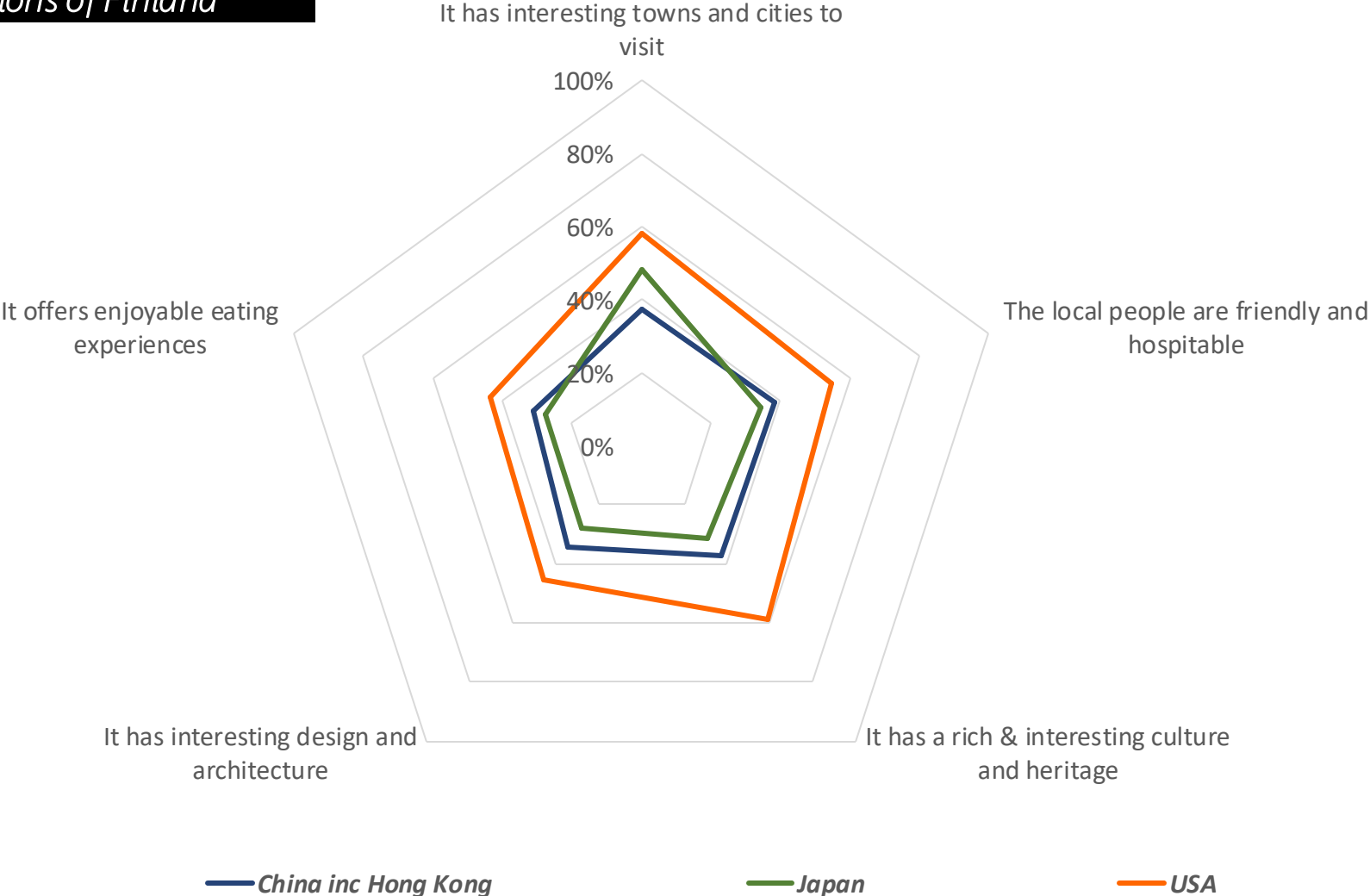
Culture



The US have stronger cultural associations with Finland than the Asian markets

Image Associations of Finland

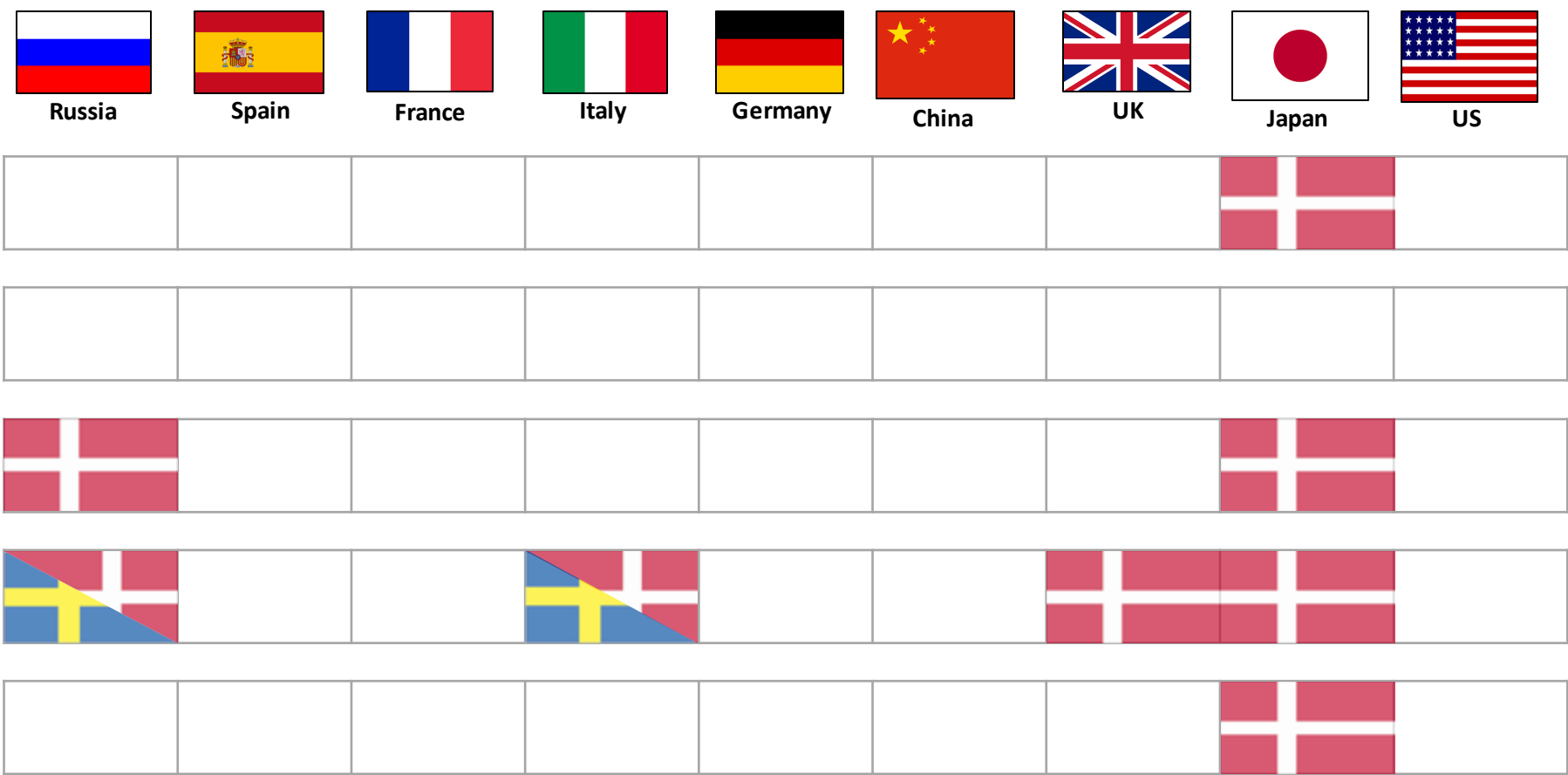
Culture



When it comes to culture, it is Denmark who performs best, notably in the Japanese market. Finland does not stand out on any cultural aspects.

Imagery relative strengths

Culture



Have we seen any movements on image perceptions since 2015?

Any statement which.. has increased by **5% or more..** in at least **3 markets**



In comparison to 2015 performance, Finland has seen improvements across several image associations

2015 comparison

Imagery Associations – key global changes vs 2015

Areas where Finland has improved:

Including:

Any statement which.. has increased by **5% or more**.. in at least **3 markets**

Rich & interesting **culture and heritage**



Interesting **towns and cities** to visit



Beautiful **coastline / archipelago**



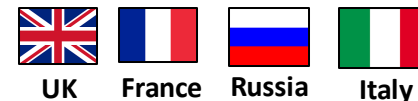
Enjoyable **eating** experiences



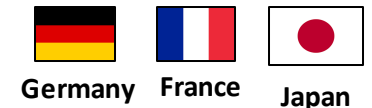
Local people are **friendly and hospitable**



Good place to visit **all year round**



Unique experiences

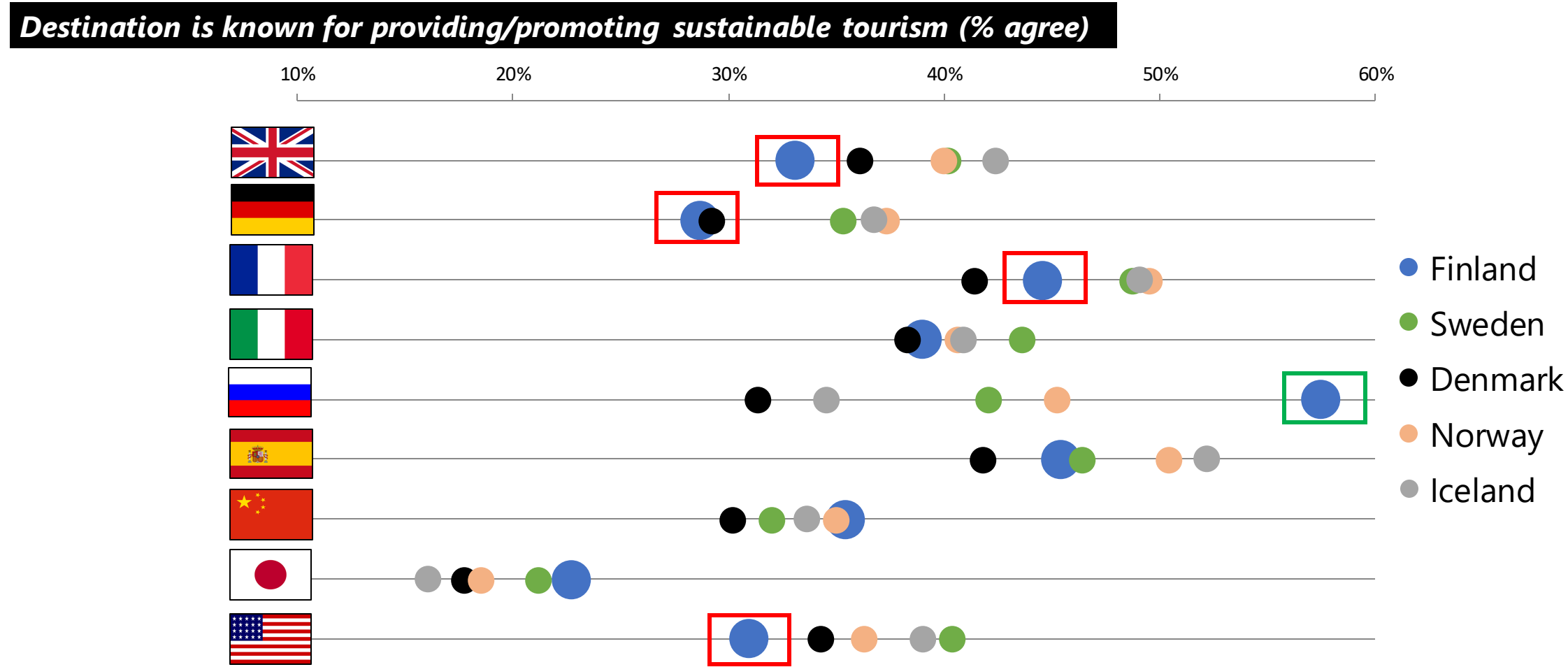




Being seen as a sustainable travel destination is a key objective for Finland.

Where does Finland stand here?

Other than in Russia where familiarity with Finland is high, awareness of Finland as a sustainable tourist destination is low. The variation across markets suggests no one really owns this metric yet



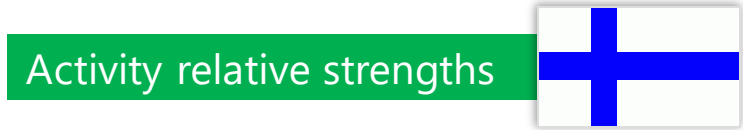
A snowboarder is captured in mid-action, leaning forward while descending a snowy slope. The snowboarder is wearing a green jacket, purple pants, a purple beanie, and goggles. A spray of snow is kicked up behind the board. The background is a clear, vibrant blue sky.

**What activities are associated
with Finnish tourism?**

We will be focusing on activities where Finland is relatively **strongly/weakly** associated on a global level, so:

Activities which are strong/weak for Finland in at least **3 markets**

The following activities are those where Finland stands out from competitors on association, mostly those with a winter theme..



Visiting the home of Santa Claus

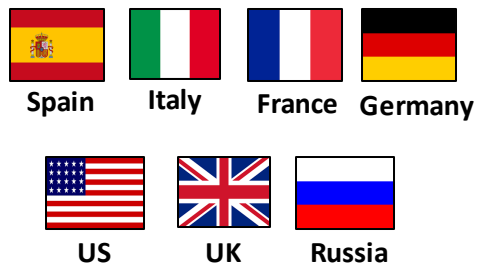
Stands out in:

All markets



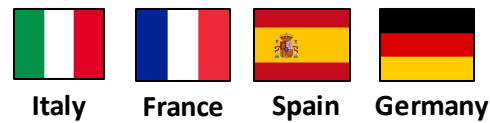
Sleight rides pulled by huskies or reindeer

Stands out in:



Sleeping in igloos

Stands out in:



Saunas

Stands out in:



Moomins

Stands out in:

All markets

(Please note low awareness)

Where Finland does not do so well is on cultural and beach/coast activities

Activity relative weaknesses



Enjoy culinary experiences

Relative weakness in:


Spain


Russia


Japan



Heritage sites and museums

Relative weakness in:


Italy


Germany


Spain


Russia


France


Japan



Cultural festivals and events

Relative weakness in:


Italy


Germany


Japan


Spain



Experiencing indigenous cultures

Relative weakness in:


China


Russia


Japan



Island hopping

Relative weakness in:


Russia


Italy


Spain


France


UK


Germany



Beaches and summer activities

Relative weakness in:


Japan


Italy


Spain


France


UK


Germany

Denmark is performing well on many of these weaknesses for Finland, both in regards to culture and beach activities.

Activity relative strengths

Culture



Enjoy culinary experiences



Heritage sites and museums



Cultural festivals and events



Experiencing indigenous cultures



Beach/Island activities



Island hopping



Beaches and summer activities





Summary of the 4 marketing regions



Helsinki

- Amongst those who are already considering a Finland holiday, visiting Helsinki is looking particularly encouraging with US, Japan and the UK
- Spontaneous association of Helsinki are strongly focused on culture with the European markets
- The Asian market have rich and detailed associations with Helsinki, with a large focus on churches and cathedrals but also more specific association with the Moomins and Marimekko
- The 2020 goal of Helsinki being the sustainable go to destination needs further emphasis as this currently isn't strongly associated with the region in any of the markets

Lapland

- Overall familiarity is high across markets, however there is a large proportion who claim to only have a bit of knowledge
- Intention to visit Lapland is highest in the European markets
- The key selling points including Santa Claus, reindeer and natural wonders, are reflected in spontaneous perceptions of the region
- Bearing in mind the 2020 region goals of raising awareness of snow-free Lapland and the summer/autumn seasons, a further push for the all year around aspects is needed



Lakeland

- Overall, familiarity of the Lakeland region is quite high across three of the key 2020 markets (Germany, Russia and China), work needs to be done to increase awareness in Japan. Much of the region's familiarity is driven by those who only have a bit of knowledge
- Consideration of Lakeland as a holiday destination is higher among the European countries
- The region is strongly associated with its nature and its beauty. Fishing has strong associations in Germany and particularly Russia

Coast & Archipelago

- For those considering a holiday to Finland, the coastal region does not seem to be the first choice of destination. Conversion rates from overall Finland considerer to region considerer is lower for the Cost and Archipelago region than Finland's other regions
- Common associations with the region, across markets, are of nature, beauty and the islands.
- Possibly some misattribution with other Nordic countries in some markets – particularly Japan – with associations around fjords and cruises

Final Thoughts



Final Thoughts

- ❖ Gaining attention is the hardest part of your job as a tourist board. Focus on core messages and themes, don't spread yourself too thinly
- ❖ Reinforcing the key messages about what Finland has to offer is key to building familiarity
- ❖ Christmas is core, and accentuating the link to Lapland will be important in building up knowledge about the wider Lapland offer – strengthen the mental network.
- ❖ Lakeland is also unique – focus on what the region has to offer in terms of activities, a more conscious link is needed between the region and what it has to offer
- ❖ Culture is improving but we still lag behind the competition. Consider what we can focus on here? What cultural elements can Finland genuinely compete on? What role can Helsinki play in this?



Visit Finland