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 as 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

Japan
Males & Females
18-65 years
Planning holiday to Europe in next 3 years

China
(inc Hong Kong)
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?

Screener

Familiarity

How well known is Finland as a travel destination?

How attractive is Finland as a travel destination?

How is Finland perceived as a travel destination?

Consideration

Image & Associations

Familiarity + consideration of 4 Finnish regions

Focus on regions

How does Finland compare to our competitors?

What are the spontaneous associations with the regions?
Who are we comparing ourselves against?

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

Vs.

Norway

Iceland

Sweden

Denmark
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
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank</th>
<th>Best in Nordics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>#1</td>
<td>Norway</td>
</tr>
<tr>
<td>Spain</td>
<td>#3</td>
<td>Norway</td>
</tr>
<tr>
<td>France</td>
<td>#3</td>
<td>Norway</td>
</tr>
<tr>
<td>Italy</td>
<td>#3</td>
<td>Norway</td>
</tr>
<tr>
<td>Germany</td>
<td>#4</td>
<td>Sweden</td>
</tr>
<tr>
<td>China</td>
<td>#1</td>
<td>Norway</td>
</tr>
<tr>
<td>Japan</td>
<td>#5</td>
<td>Norway</td>
</tr>
<tr>
<td>UK</td>
<td>#5</td>
<td>Iceland</td>
</tr>
<tr>
<td>US</td>
<td>#5</td>
<td>Norway</td>
</tr>
</tbody>
</table>

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.
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.

### Prompted Consideration - Finland

<table>
<thead>
<tr>
<th>Country</th>
<th>Prompted Consideration</th>
<th>Spontaneous Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>63%</td>
<td>39%</td>
</tr>
<tr>
<td>Spain</td>
<td>55%</td>
<td>17%</td>
</tr>
<tr>
<td>France</td>
<td>45%</td>
<td>15%</td>
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<tr>
<td>Italy</td>
<td>51%</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>62%</td>
<td>14%</td>
</tr>
<tr>
<td>China</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Japan</td>
<td>27%</td>
<td>11%</td>
</tr>
<tr>
<td>UK</td>
<td>66%</td>
<td>12%</td>
</tr>
<tr>
<td>US</td>
<td>45%</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nordic Rank</th>
<th>Prompted Consideration</th>
<th>Spontaneous Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1🌟</td>
<td>63%</td>
<td>39%</td>
</tr>
<tr>
<td>#4</td>
<td>55%</td>
<td>17%</td>
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<tr>
<td>#4</td>
<td>45%</td>
<td>15%</td>
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<tr>
<td>#3</td>
<td>51%</td>
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<td>#4</td>
<td>62%</td>
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<tr>
<td>#1🌟</td>
<td>30%</td>
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<td>#2=$(( exercising))</td>
<td>27%</td>
<td>11%</td>
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<tr>
<td>#5</td>
<td>66%</td>
<td>12%</td>
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<tr>
<td>#5</td>
<td>45%</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Nordic Rank change vs '15

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>=</td>
</tr>
<tr>
<td>Spain</td>
<td>n/a</td>
</tr>
<tr>
<td>France</td>
<td>+2</td>
</tr>
<tr>
<td>Italy</td>
<td>=</td>
</tr>
<tr>
<td>Germany</td>
<td>+1</td>
</tr>
<tr>
<td>China</td>
<td>-1</td>
</tr>
<tr>
<td>Japan</td>
<td>=</td>
</tr>
<tr>
<td>UK</td>
<td>n/a</td>
</tr>
<tr>
<td>US</td>
<td>n/a</td>
</tr>
</tbody>
</table>

### Best in Nordics

Norway, Norway, Norway, Norway, Norway, Sweden, Sweden, Norway, Sweden

Q7. PROMPTED CONSIDERATION DESTINATION

Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?
In line with consideration, Finland is also seeing strongest claimed visits amongst the Nordics in Russia, China and Japan.

### Visitation - Finland

**Nordic Rank** (ever visited)

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank</th>
<th># Visited</th>
<th>#1</th>
<th>#4</th>
<th>#4</th>
<th>#4</th>
<th>#1</th>
<th>#1</th>
<th>#5</th>
<th>#5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>n/a</td>
<td>=</td>
<td>=</td>
<td>=</td>
<td>=</td>
<td>=</td>
<td>+1</td>
<td>=</td>
<td>=</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Visitation**

- **Visited last 3 years**
  - Russia: 11%
  - Spain: 10%
  - France: 11%
  - Italy: 18%
  - Germany: 15%
  - China: 16%
  - Japan: 14%
  - UK: 6%
  - US: 56%

- **Visited**
  - Russia: 15%
  - Spain: 11%
  - France: 11%
  - Italy: 18%
  - Germany: 15%
  - China: 16%
  - Japan: 14%
  - UK: 6%
  - US: 56%

Q3. EVER VISITED DESTINATION, Q6 VISITED P3Y

Which of these countries have you ever visited for a holiday or short break?

Which of these places have you visited for a holiday or short break within the last 3 years?
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.

<table>
<thead>
<tr>
<th>Country</th>
<th>Consideration Rank</th>
<th>Nordic Rank</th>
<th>Destination Knowledge*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>#1</td>
<td>#1</td>
<td>73%</td>
</tr>
<tr>
<td>China</td>
<td>#1</td>
<td>#1</td>
<td>44%</td>
</tr>
<tr>
<td>Japan</td>
<td>#1</td>
<td>#1</td>
<td>32%</td>
</tr>
<tr>
<td>Italy</td>
<td>#4</td>
<td>#3</td>
<td>38%</td>
</tr>
<tr>
<td>Germany</td>
<td>#5</td>
<td>#5</td>
<td>33%</td>
</tr>
<tr>
<td>UK</td>
<td>#5</td>
<td>#5</td>
<td>31%</td>
</tr>
<tr>
<td>US</td>
<td>#5</td>
<td>#5</td>
<td>26%</td>
</tr>
<tr>
<td>Spain</td>
<td>#5</td>
<td>#1</td>
<td>23%</td>
</tr>
<tr>
<td>France</td>
<td>#4</td>
<td>#3</td>
<td>15%</td>
</tr>
</tbody>
</table>

*Destination Knowledge refers to the level of knowledge about each country as a holiday destination, ranging from 'A great deal of knowledge' to 'A fair amount of knowledge'.
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
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.

Mental Network Analysis: discover what is truly associated with Finland
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

**Mental Networks – UK market**

- Snow | Ice | Frozen landscapes | Glaciers
- Northern Lights
- Wildlife (whales, bears, reindeer)
- Forests
- Lakes
- Beautiful scenery | landscape
- Nature | Rugged landscapes | Green
- Fjords
- Mountains
- Saunas
- Clean | Fresh
- Cold, Dark
- Expensive
- Winter activities (Ski, Sled)
- Fish | Fishing
- Interesting | Different
- Christmas time | Father Christmas | Santa
- Good | Great
- Scandinavian
- Cultural | Culture | Traditions
- Helsinki
- The food
- Beer | alcohol
- Nice
- Beautiful | Attractive
- Love | Romantic
- Friendly | nice | welcoming people
- Beautiful scenery | landscape
- Clean | Fresh
- Fjords
- Mountains
- Saunas
- Forests
- Lakes
- Nature | Rugged landscapes | Green
- Snow | Ice | Frozen landscapes | Glaciers
- Northern Lights
- Wildlife (whales, bears, reindeer)
- Cold, Dark
- Expensive
- Winter activities (Ski, Sled)
- Fish | Fishing
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- Christmas time | Father Christmas | Santa
- Good | Great
- Scandinavian
- Cultural | Culture | Traditions
- Helsinki
- The food
- Beer | alcohol
- Nice
- Beautiful | Attractive
- Love | Romantic
- Friendly | nice | welcoming people

**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**

- Beautiful scenery | landscape
- Clean | Fresh
- Expensive
- Oslo
- Cold, Dark
- Beautiful | Attractive
- Amazing
- Friendly | nice | welcoming
- people
- Nice
- Good | Great
- Interesting | Different
- Quiet | Peaceful
- The food
- Vikings | Norse attractions
- Scandinavian
- History | Historic
- Cultural | Culture | Traditions
- Fjords
- Nature | Rugged landscapes | Green
- Forests
- Mountains
- Northern Lights
- Scenery | Views
- Lakes
- Snow | Ice | Frozen landscapes | Glaciers
- Wildlife (whales, bears, reindeer)
- Cruises
- Winter activities (Ski, Sled)
- Fish | Fishing

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**

- **Expensive**
- **Scenery | Views**
- **Interesting | Different**
- **Wildlife (whales, bears, reindeer)**
- **Scandinavian**
- **Winter activities (Ski, Sled)**
- **Art | Museums**
- **Love | Romantic**
- **Vikings | Norse attractions**
- **Friendly | nice | welcoming people**
- **Relaxed | Easy going | Peaceful**
- **Architecture | Buildings**
- **Good | Great**
- **Snow | Ice | Frozen landscapes | Glaciers**

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.
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**

VisitFinland

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

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.

Mental Networks – DE market

- Snow | Ice | Frozen landscapes | Glaciers
- Wildlife (whales, bears, reindeer, horses, moose)
- Forests
- Lakes
- Nature | Rugged landscapes | Green
- Saunas
- Mosquitoes
- Helsinki
- Untouched | Wild | nature | Parks
- Fjords
- Northern Lights | Auroras | Polar lights
- Lapland
- Quiet | Peaceful
- Cold, Dark
- Christmas time | Father Christmas | Santa
- Expensive
- Nice
- Friendly | nice | welcoming people
- Difficult language
- Beautiful, great, wonderful scenery | landscape
- Vastness | Expanse
- Good - not specific
- Good - not specific
- Good - not specific
- Good - not specific
- Good - not specific

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

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

**Mental Networks – DE market**

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

**Stockholm**

- The sea | seaside | beaches
- The Royal Family
- Ikea
- Vastness | Expanse
- Holidays | Family holiday | Visit friends
- Fish | Fishing
- The food
- Cultural | Culture | Traditions
- Interesting | Attractive Cities
- Gothenburg
- Architecture | Buildings
- Quiet | Peaceful
- Interesting | Different

**Water | water ways | rivers**

- Fjords
- Islands | Archipelago
- Forests
- Lakes

**Wildlife (whales, bears, reindeer, horses, moose)**

**Nature | Rugged landscapes | Green**

- Beautiful, great, wonderful scenery | landscape
- Friendly | nice | welcoming people

**Vastness | Expanse**

- Expenses
- Holidays | Family holiday | Visit friends
- Fish | Fishing

**Germany**

**VisitFinland**

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

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.
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.

**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.

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**Functional**

- Lakes
- Christmas
- Saunas

**Cities**

- Helsinki
- Wrocław

**Emotional**

- Difficult language
- Vastness | Expanse

**Food/Drink**

- Hot springs | Hot spas | Geysers | Thermal pool

**Negative**

- Loneliness

**Image**

- Winter activities (Ski, Sled)
- Untouched | Wild nature | Parks

**Landmarks**

- The Baltic Sea
- The North Sea

**Nature, Landscapes**

- Fjords
- Mountains
- Northern Lights | Auroras | Polar lights
- Winter activities (Ski, Sled)

**Germany**

- Architecture | Buildings
- Islands | Archipelago
- Gothenburg

**Mental Networks – DE 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.
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

France

Italy

Russia

To note: the word ‘cold’ has been removed from the word clouds, in order to see more detailed associations with Finland.
Beauty and Christmas associations come through more in the long haul markets, with mentions of the Northern Lights. Moomins are a standout in Japan.

To note: the word 'cold' has been removed from the word clouds, in order to see more detailed associations with Finland.
What is Finland associated with when prompted?
We have measured imagery associations in the following way...

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

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)

- **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.
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**

> It has beautiful natural landscapes

- **It has a beautiful coastline/archipelago**

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

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**Q13 IMAGE ASSOCIATIONS**

Do you associate any of these holiday destinations with the following statements?
Looking at the relative strengths, Finland’s ownership on beautiful lakes becomes clear.

<table>
<thead>
<tr>
<th>Country</th>
<th>Nature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>It has beautiful natural landscapes</td>
</tr>
<tr>
<td>Spain</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
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<tr>
<td>Italy</td>
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<td>Germany</td>
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<td>China</td>
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<td>UK</td>
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<tr>
<td>Japan</td>
<td></td>
</tr>
<tr>
<td>US</td>
<td></td>
</tr>
</tbody>
</table>

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

= Country strongly associated with statement in market
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.
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**

- It offers calming and relaxing wilderness escapes/experiences (100%)
- It's a great place for winter sports/activities (80%)
- It provides high-end/luxurious holiday experiences (60%)
- It offers unique experiences (40%)
- You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.) (20%)

**Q13 IMAGE ASSOCIATIONS**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Russia</th>
<th>Spain</th>
<th>France</th>
<th>Italy</th>
<th>Germany</th>
<th>China</th>
<th>UK</th>
<th>Japan</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>It offers calming and relaxing <em>wilderness</em> escapes/experiences</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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</tr>
<tr>
<td>It’s a great place for <em>winter sports</em> activities</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>It offers <em>unique</em> experiences</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>It provides <em>high-end/luxurious</em> holiday experiences</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>You can enjoy an <em>active summer</em> holiday there (e.g. cycling, canoeing, hiking etc.)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Finland is not perceived as well on cultural aspects in Europe

**Image Associations of Finland**

- It has interesting towns and cities to visit
- The local people are friendly and hospitable
- It offers enjoyable eating experiences
- It has interesting design and architecture
- It has a rich & interesting culture and heritage

Q13 IMAGE ASSOCIATIONS
Do you associate any of these holiday destinations with the following statements?
The US have stronger cultural associations with Finland than the Asian markets.
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.

<table>
<thead>
<tr>
<th>Imagery relative strengths</th>
<th>Russia</th>
<th>Spain</th>
<th>France</th>
<th>Italy</th>
<th>Germany</th>
<th>China</th>
<th>UK</th>
<th>Japan</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Culture</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It has interesting <strong>towns and cities</strong> to visit</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>The <strong>local people</strong> are friendly and hospitable</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>It has a rich &amp; interesting <strong>culture and heritage</strong></td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>It has interesting <strong>design and architecture</strong></td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>It offers enjoyable <strong>eating experiences</strong></td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
</tbody>
</table>
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.

Areas where Finland has improved:

- Rich & interesting **culture and heritage**
  - UK, France, Russia

- Interesting **towns and cities** to visit
  - UK, Germany, France, Russia, Japan

- Beautiful **coastline / archipelago**
  - UK, Germany, Japan, China

- Enjoyable **eating** experiences
  - UK, Germany, France, Russia

- Local people are **friendly and hospitable**
  - UK, France, Russia, China

- Good place to visit **all year round**
  - UK, France, Russia, Italy, Japan

- Unique **experiences**
  - Germany, France, Japan

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

To note: some statements were added/removed between 2015 and 2019. Spain and US markets not tracked in 2015.
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.

**Destination is known for providing/promoting sustainable tourism (% agree)**

- Finland
- Sweden
- Denmark
- Norway
- Iceland

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

**Activity relative strengths**

### Visiting the home of Santa Claus
- **Stands out in:** All markets

### Sleigh rides pulled by huskies or reindeer
- **Stands out in:** Spain, Italy, France, Germany, Russia, US, UK

### Sleeping in igloos
- **Stands out in:** Italy, France, Spain, Germany

### Saunas
- **Stands out in:** Germany, Russia, Japan

### Moomins
- **Stands out in:** All markets

*(Please note low awareness)*
Where Finland does not do so well is on cultural and beach/coast activities.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Relative Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enjoy culinary experiences</td>
<td>Spain, Russia</td>
</tr>
<tr>
<td>Heritage sites and museums</td>
<td>Italy, Germany</td>
</tr>
<tr>
<td>Cultural festivals and events</td>
<td>Italy, Germany</td>
</tr>
<tr>
<td>Experiencing indigenous cultures</td>
<td>China, Russia</td>
</tr>
<tr>
<td>Island hopping</td>
<td>Russia, Italy, Spain</td>
</tr>
<tr>
<td>Beaches and summer activities</td>
<td>Japan, Spain</td>
</tr>
</tbody>
</table>

Q15 ACTIVITIES ASSOCIATION
Do you associate any of these holiday destinations with the following activities and experiences?
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

* Relative strength in at least three markets
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.
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.
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

❖ 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