

# Market Insights Spain



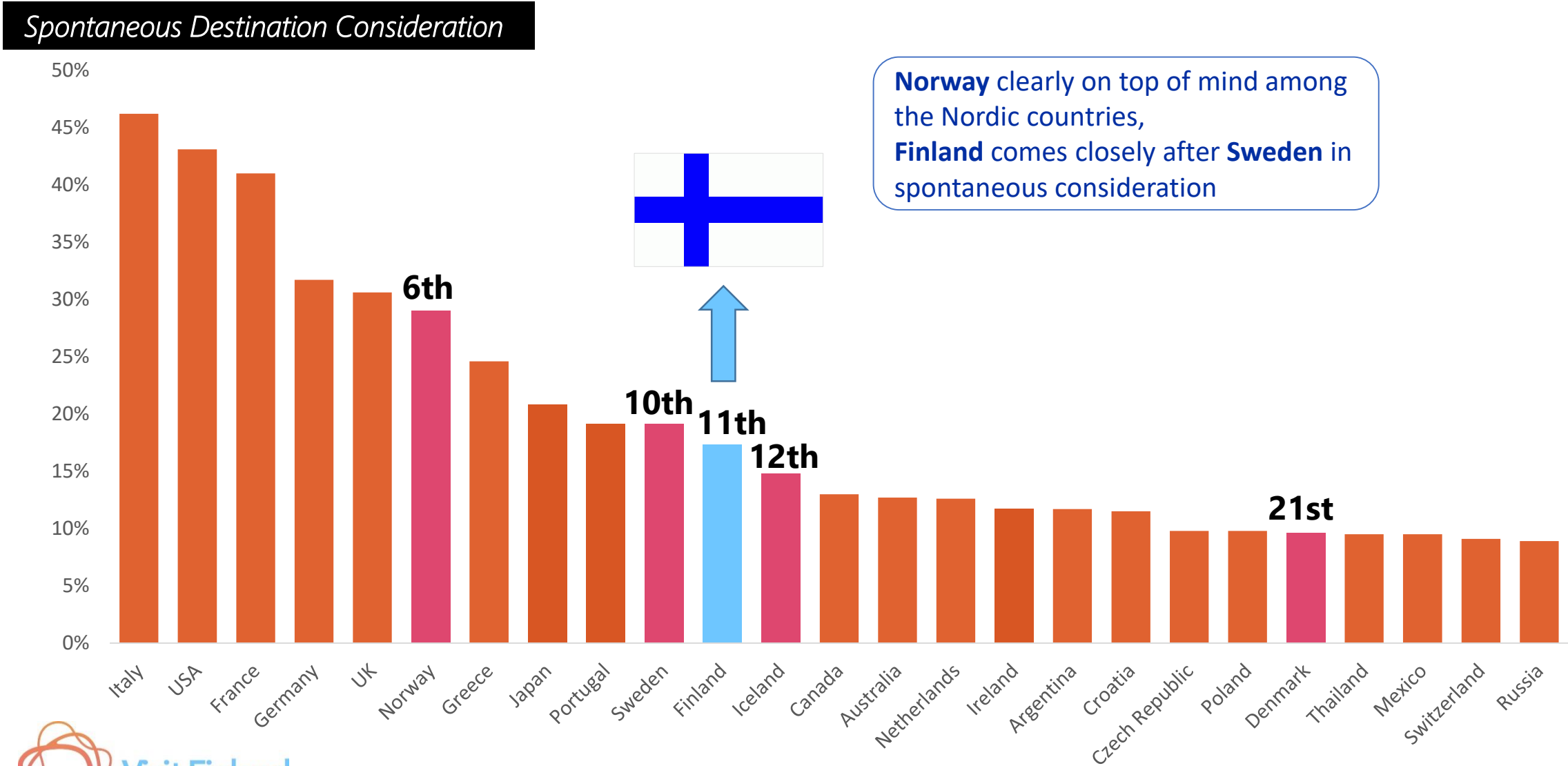




# Finland's image as a travel destination in Spain

Brand Tracking survey 2019

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



Visit Finland

**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)

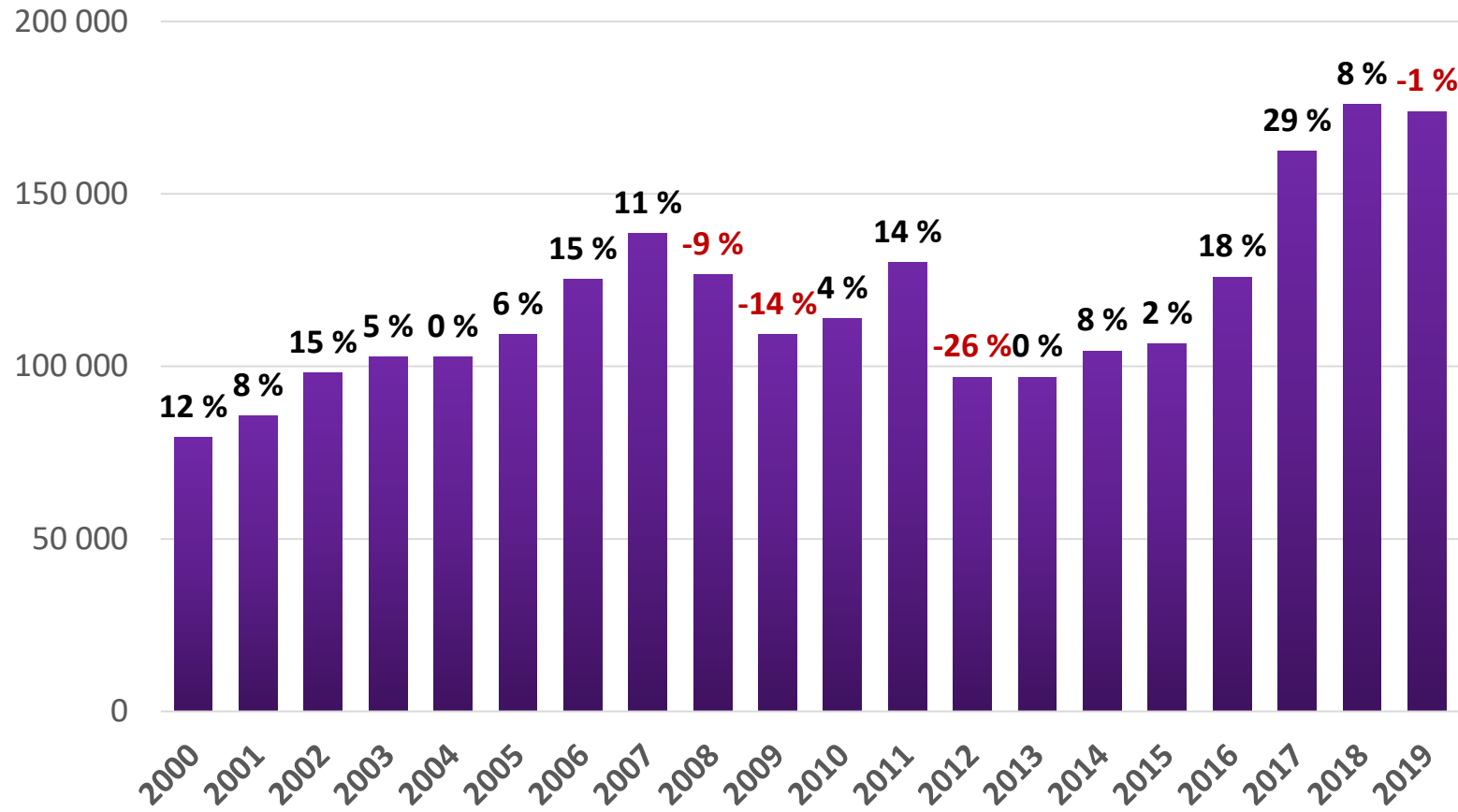




# SPANISH OVERNIGHTS IN FINLAND AND IN THE NORDICS



# Spanish overnights in Finland (pre-covid19)



## Year 2019

**173 800** overnights in total

**13<sup>th</sup>** in country rankings  
with a **2% share** of foreign overnights

Average change 2000-2019: **+5%**

Change 2019 compared to 2000: **+119%**

Share of overnights by regions 2019



**47%**



**11%**



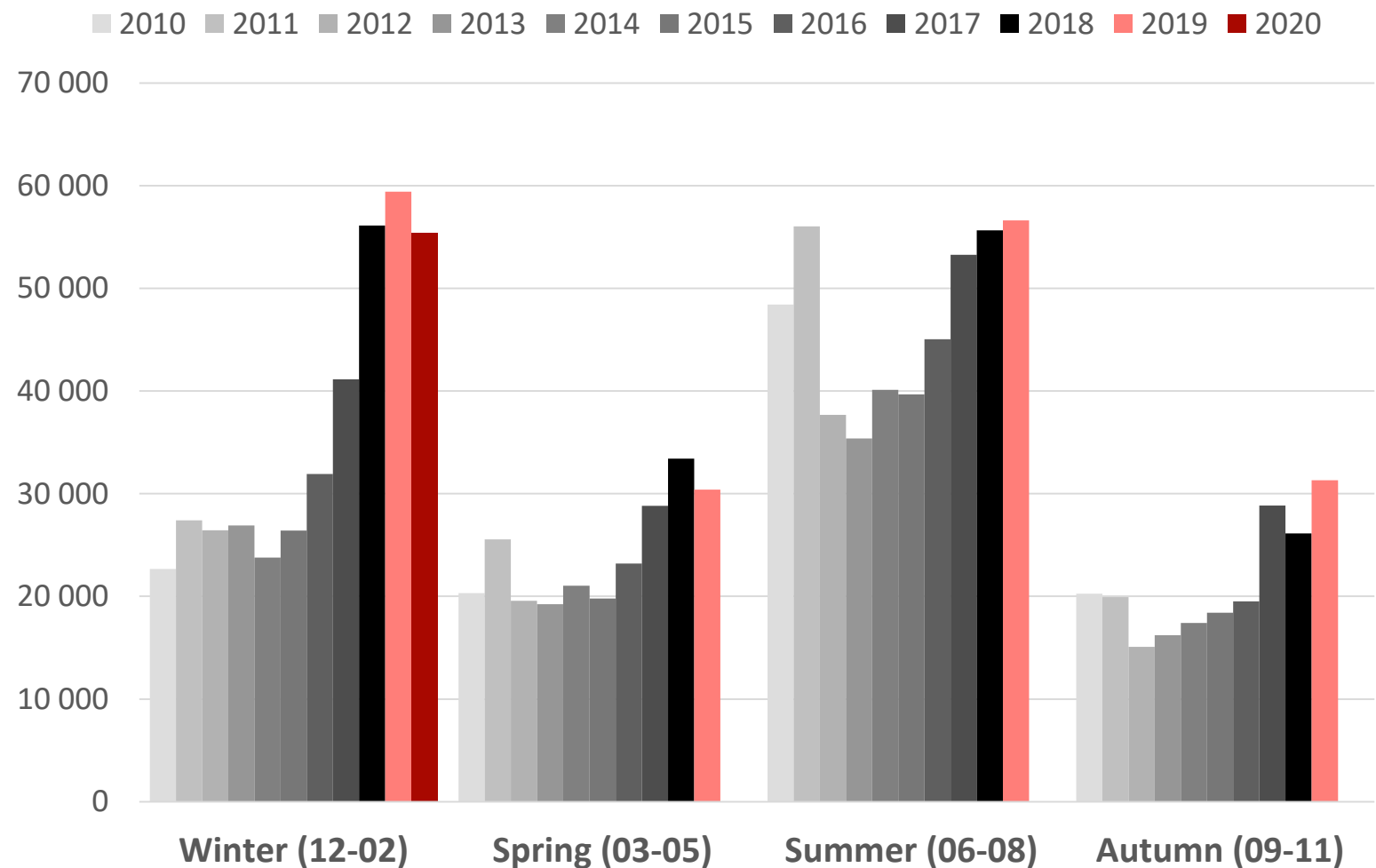
**9%**



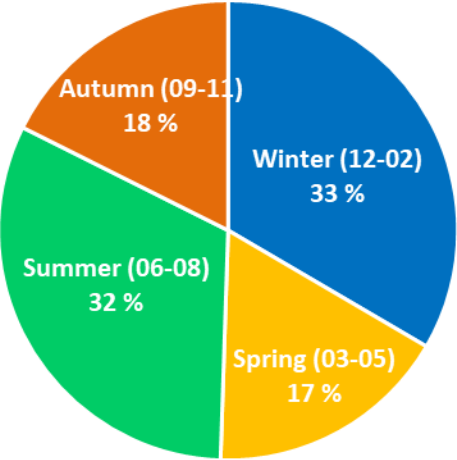
**33%**



# Seasonality of Spanish overnights in Finland (pre-covid19)



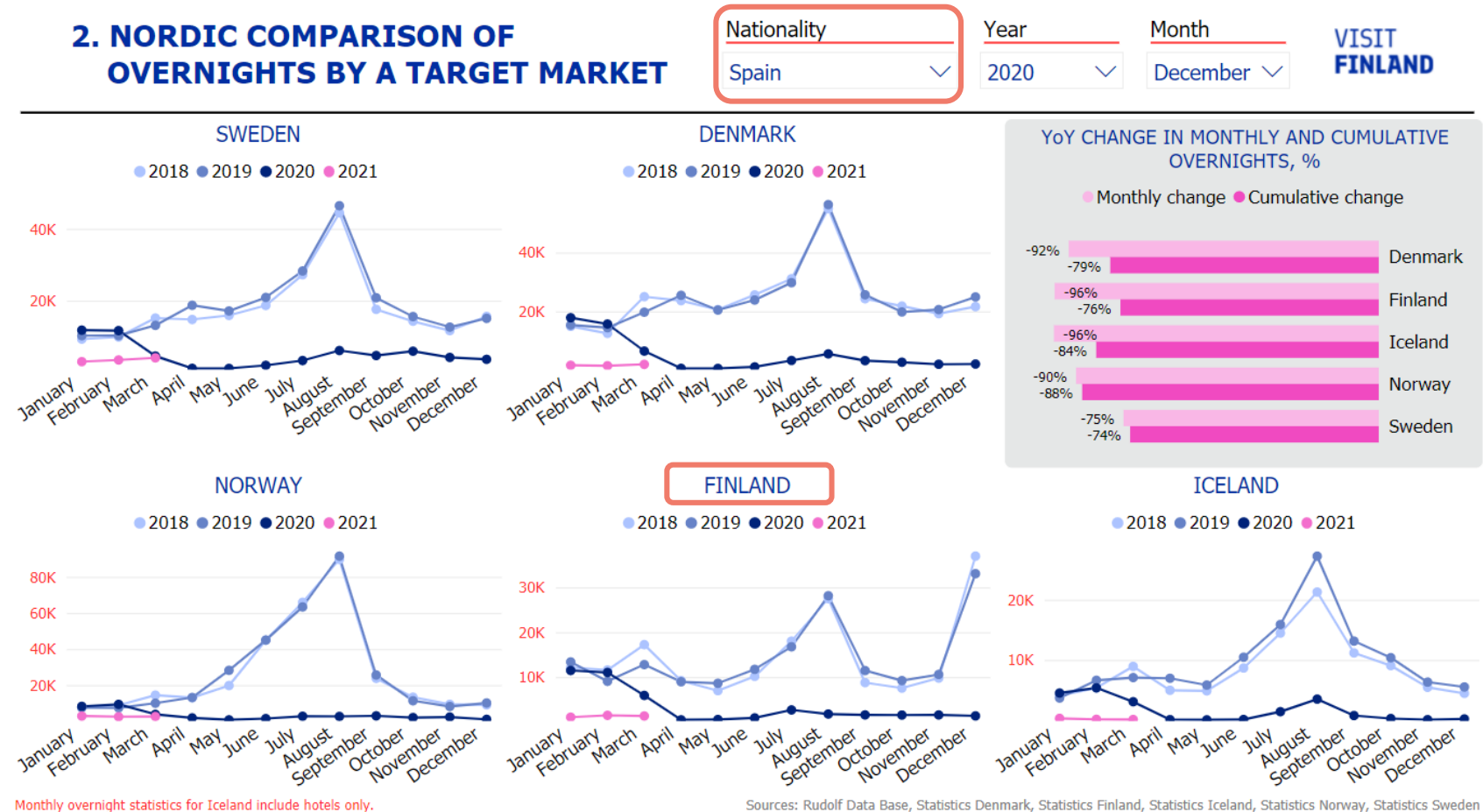
Spanish overnights in 2019



# Spanish overnights in Nordics

## Monthly trend

- **August** has clearly been the most popular month for the **Spanish travellers** to visit the Nordics.
- However, in **Finland December** has been even more popular time for the Spaniards to spend their holidays in Finland.
- Travel from Spain to the Nordic countries has been nearly non-existing since April 2020. Only some traffic can be seen in August 2020 to Iceland and Denmark with the border openings, and to Sweden with looser travel policy.
- **Finland's share of the Spanish visitors** among the Nordic countries was **15% in 2019**.





# Spanish overnights in Nordics

## Seasonal trend

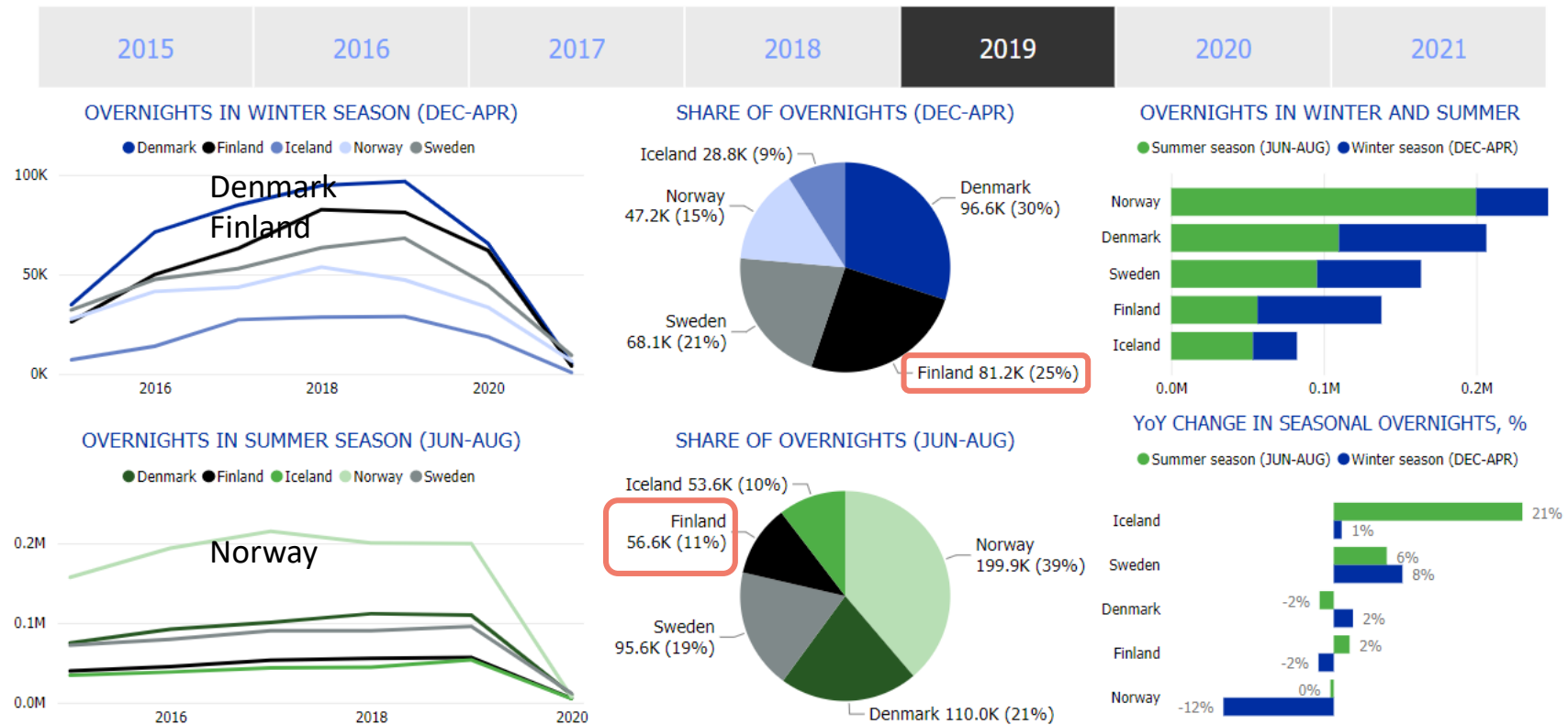
- **Finland** comes on the second position among the Nordics for the Spanish travellers during the **winter season** (around 25% market share)
- **Nearly 70%** of the Spanish visitors to Finland during the winter season travel to **Lapland**
- During the **summer season**, **Norway** is clearly the most popular destination among the Nordics for the Spanish visitors
- Finland's share in the summer season 2019 was only 11% of the Spanish overnights in the Nordics
- **Summer travel** from Spain to Iceland, Sweden and Finland was increasing in 2019

## 5. SEASONAL OVERNIGHTS BY A TARGET MARKET IN THE NORDIC COUNTRIES

Sources: Rudolf Data Base, Statistics Denmark, Statistics Finland, Statistics Iceland, Statistics Norway, Statistics Sweden

Nationality  
Spain

VISIT FINLAND





# DIGITAL DEMAND 2020

TOURISM-RELATED INTERNET  
SEARCHES ABOUT FINLAND





# Spain is #8 market by the volume of tourism-related searches about Finland

All together  
4,8 million international searches  
(-12% compared to 2019)

Source: [Digital Demand /Visit Finland 2021](#)

## Target Market Distribution

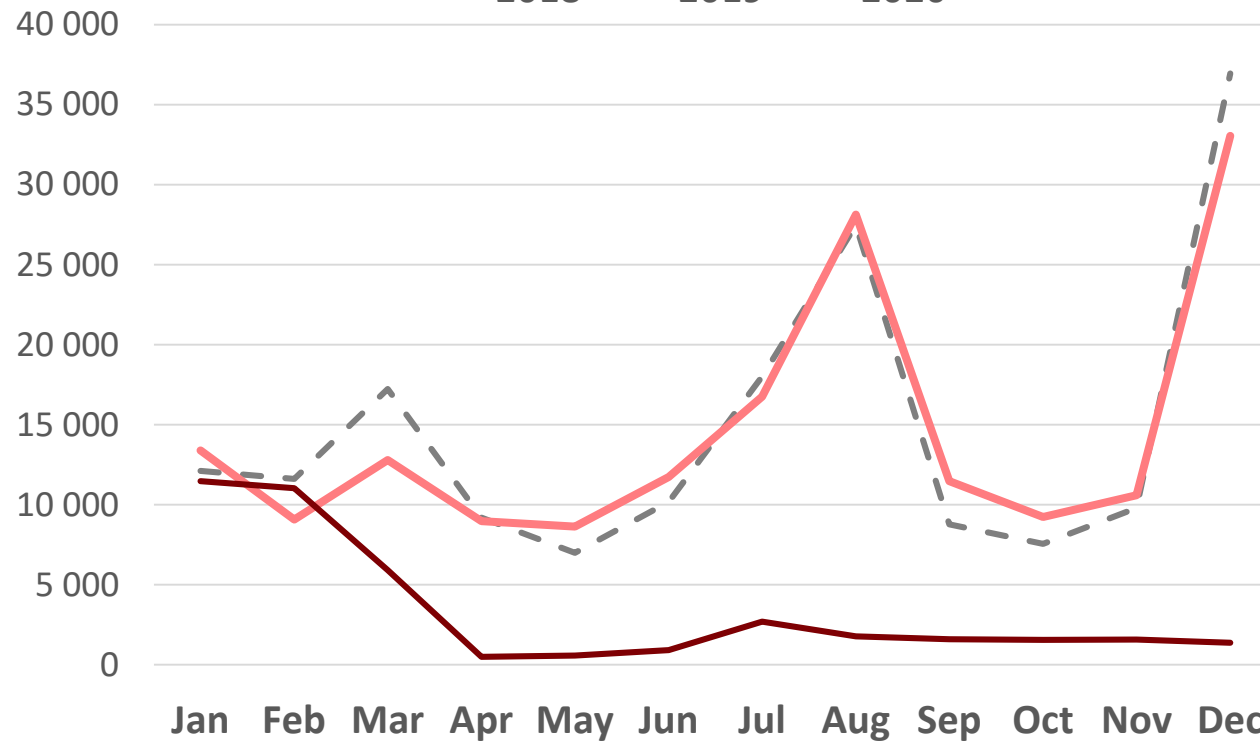
Rank	Flag	Country	Searches	Growth
1		Japan	488,824	-13.3%
2		Germany	480,439	-3.5%
3		United States	457,516	5.4%
4		Russia	347,434	-36.5%
5		United Kingdom	333,867	-7.3%
6		France	205,467	-17.8%
7		China	201,482	-63.3%
8		Spain	182,232	-11.3%
9		Netherlands	180,535	24.8%
10		India	171,296	5.7%
11		Estonia	136,670	19.4%
12		Sweden	128,918	-3.2%
13		Switzerland	108,984	-10.0%
14		Norway	74,032	14.6%
15		Denmark	54,076	-1.4%



# TRAVEL AND SEARCHES FROM **SPAIN**

## Spanish overnights in Finland

-- 2018 — 2019 — 2020

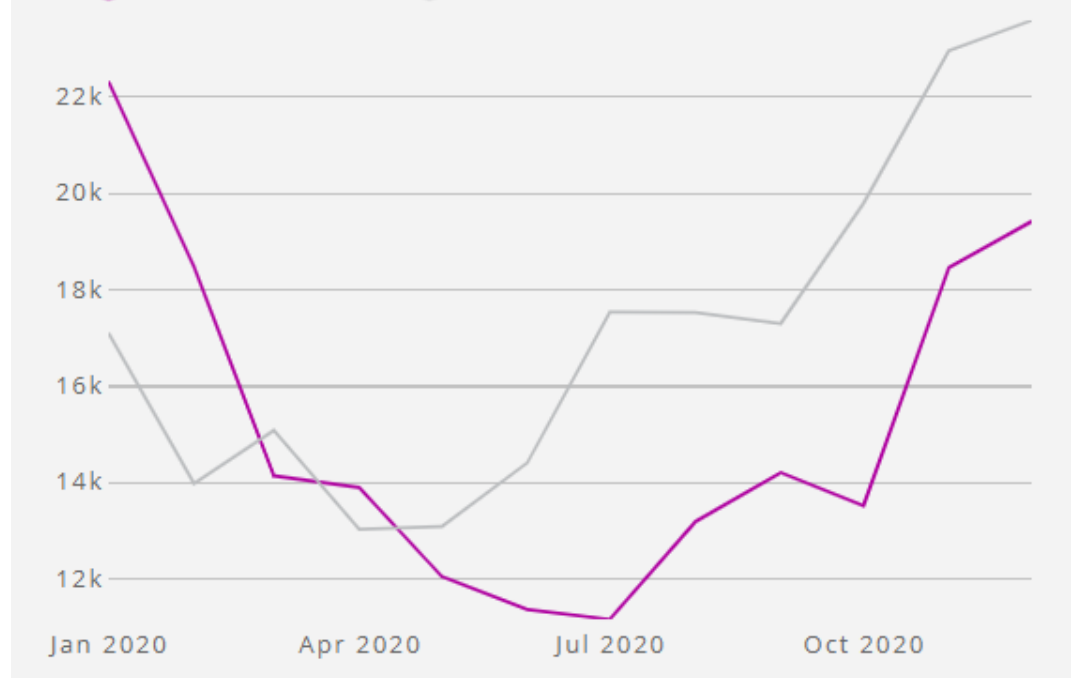


## Travel related searches for Finland

Seasonality

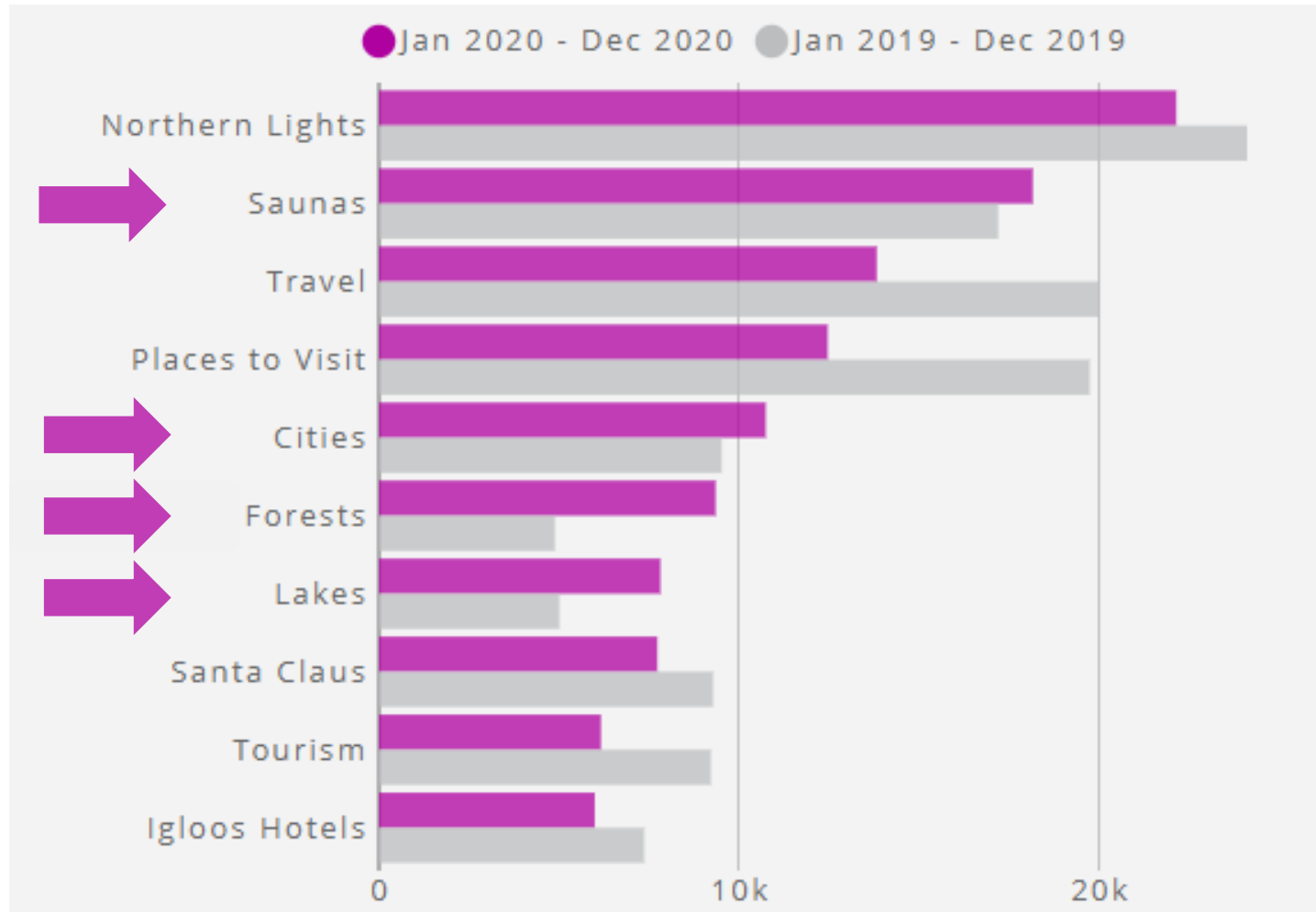
● Jan 2020 - Dec 2020 ● Jan 2019 - Dec 2019

**Spain**



- Peak in Spanish overnights usually takes place in August and December, travel related searches start to increase in July and tend to grow towards the winter
- Spanish overnights decreased in 2020 by **76%**, while searches decreased clearly less, by **11%**, compared to 2019

# Spain: Most searched topics in 2020: Top 10 micro brandtags

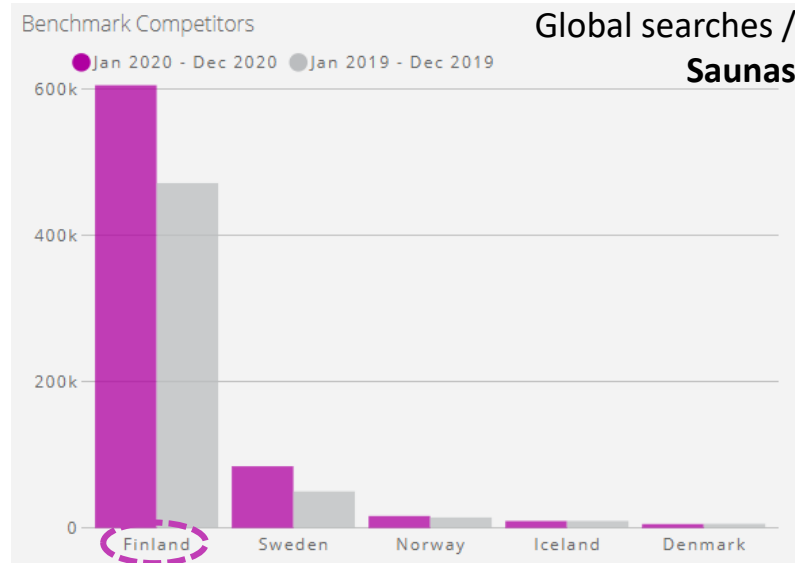


- **Saunas, Cities, Forests and Lakes** were among the top 10 searches and growing
- **Northern Lights** still #1 (*searches for Northern lights and Santa Claus normally grow a lot towards the end of the year*)

	Spain's ranking	YtoY change for Spain
Northern lights	6.	-8%
Saunas	7.	+6%
Cities	8.	+13%
Forests	2.	+91%
Lakes	5.	+56%
Santa Claus	6.	-17%
Igloos Hotels	5.	-19%

# Saunas:

Interest high for Finland in general and steady growth during the whole year 2020

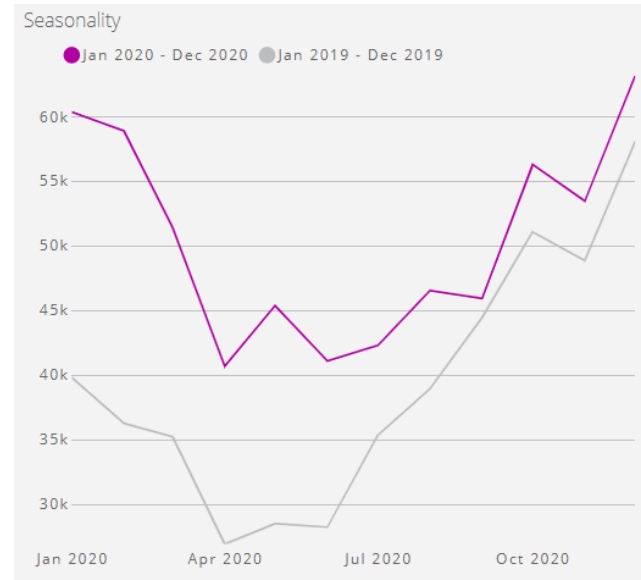


Travel-related searches on Saunas for Finland in 2020

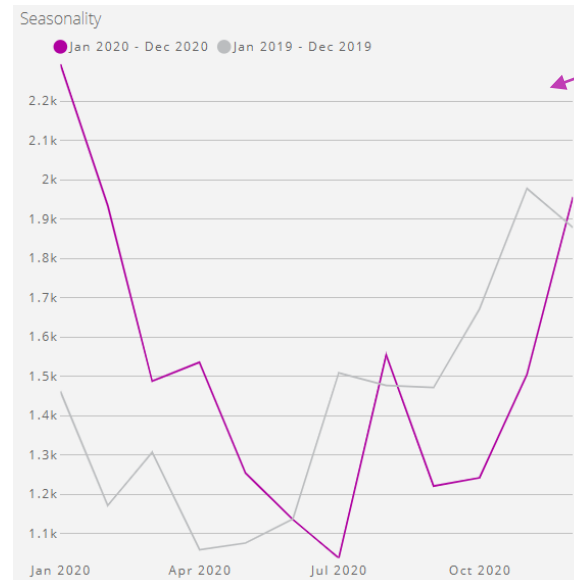
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	112,303	43.3%
2		United States	92,557	35.4%
3		Germany	56,300	17.5%
4		Netherlands	34,080	44.3%
5		France	19,801	-1.7%
6		United Kingdom	18,545	16.5%
7		Spain	18,160	5.6%
8		South Korea	13,980	114.7%
9		Switzerland	9,234	20.8%
10		Russia	8,938	12.8%

FINLAND: **Global** searches for Saunas growing



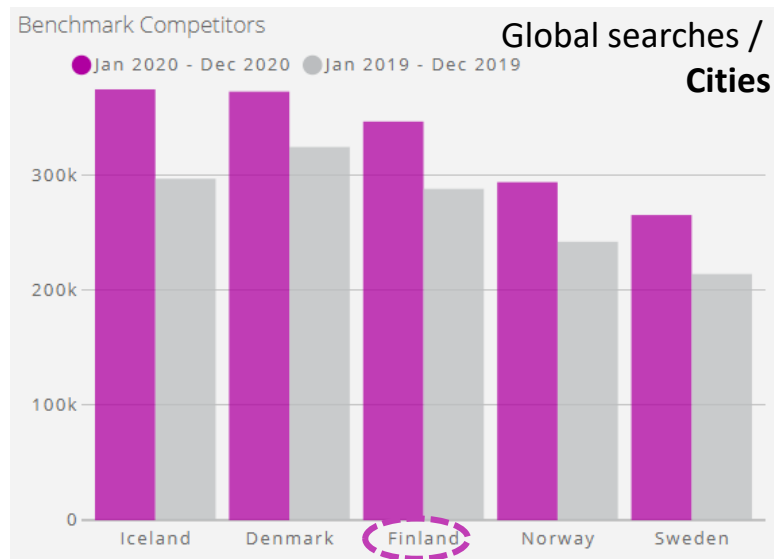
FINLAND: **Spanish** searches for Saunas



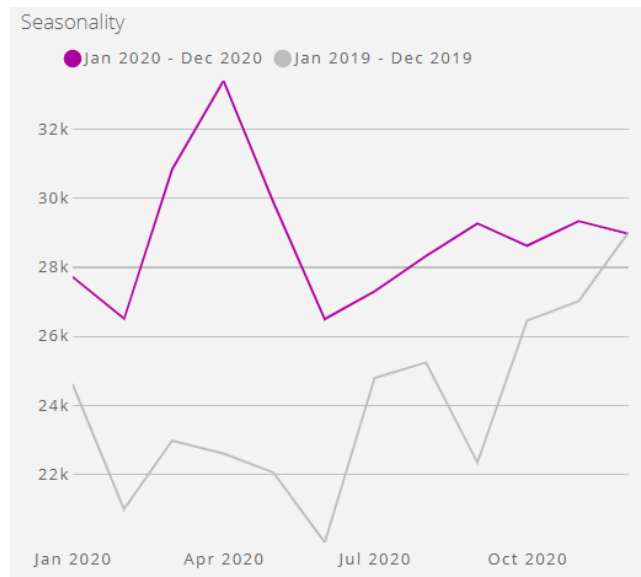


# Cities:

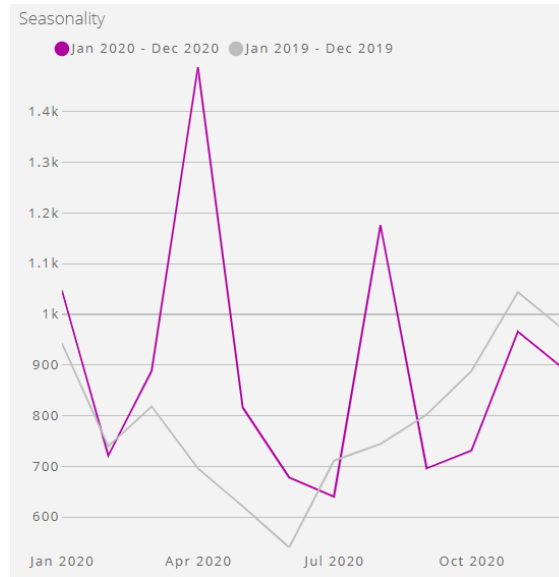
Interest increasing in overall and has also been growing in Spain during the latest years



FINLAND: Global searches for Cities



FINLAND: Spanish searches for Cities



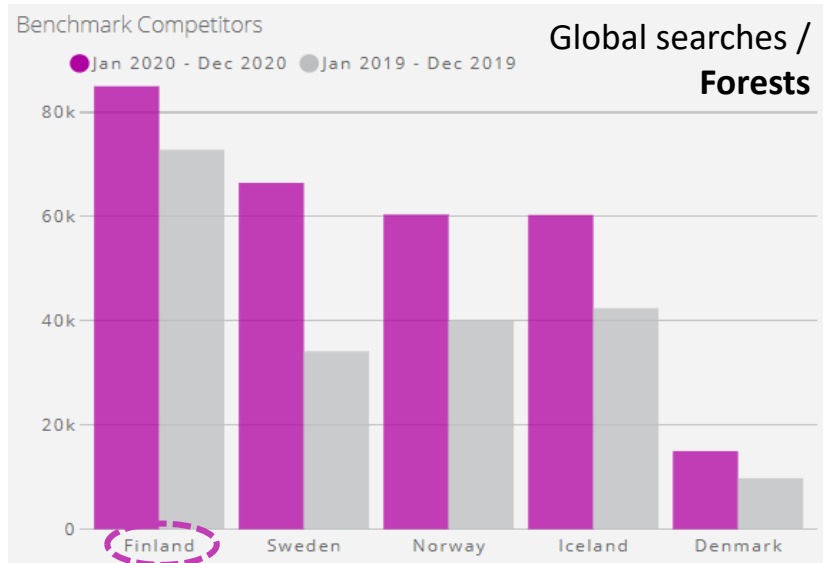
Travel-related searches on Cities for Finland in 2020

Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Estonia	46,084	44.2%
2		United States	36,646	18.7%
3		Germany	24,632	9.3%
4		India	19,132	45.0%
5		Sweden	16,635	22.7%
6		France	16,413	-18.3%
7		United Kingdom	16,009	23.3%
8		Spain	10,741	12.8%
9		Norway	8,099	61.3%
10		Russia	5,130	-34.7%

# Forests:

Interest increasing in overall and has also been growing in Spain during the latest years

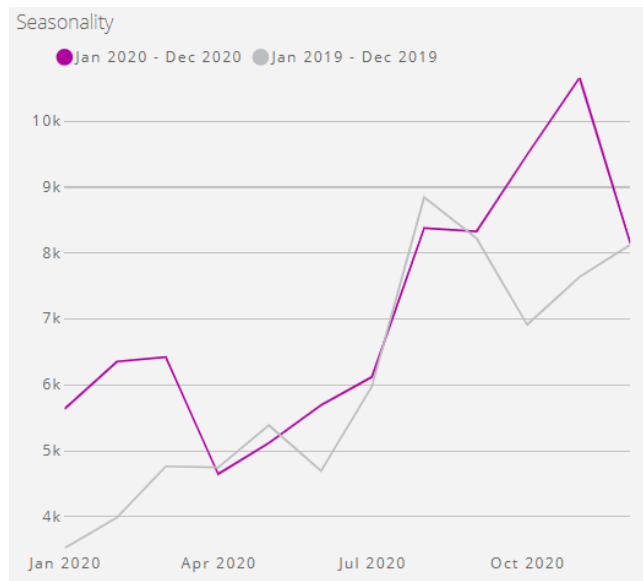


Travel-related searches on Forests for Finland in 2020

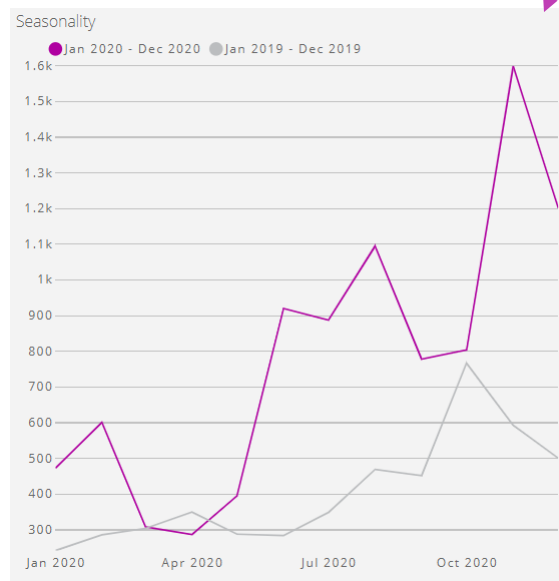
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	39,711	-10.9%
2		Spain	9,351	91.4%
3		United States	6,696	70.3%
4		Russia	3,720	39.7%
5		Germany	3,664	46.2%
6		United Kingdom	3,001	29.8%

FINLAND: **Global** searches for Forests

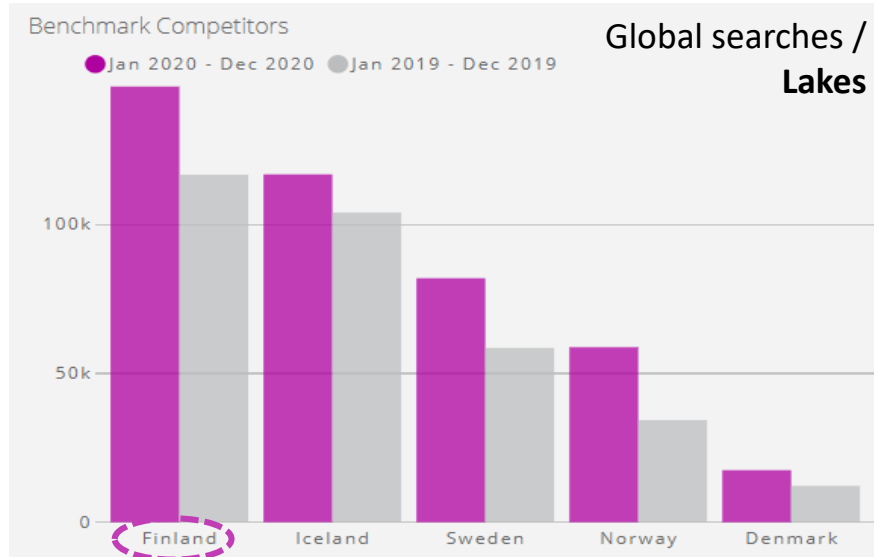


FINLAND: **Spanish** searches for Forests



# Lakes:

Interest increasing in overall and has also been growing in Spain during the latest years

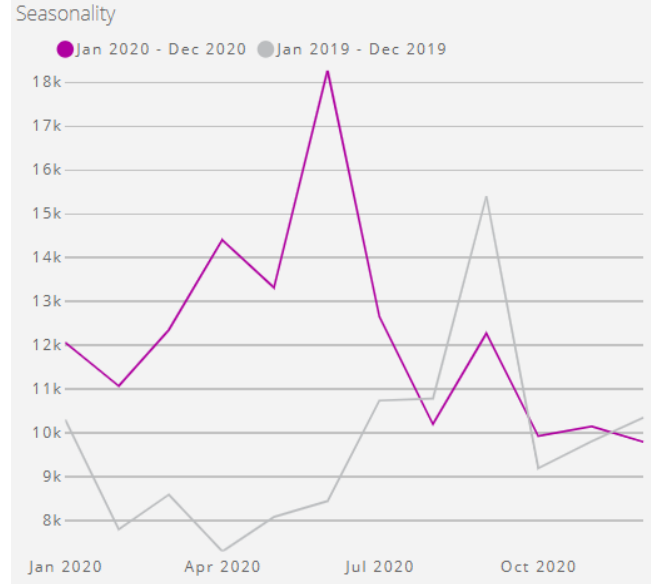


## Travel-related searches on Lakes for Finland in 2020

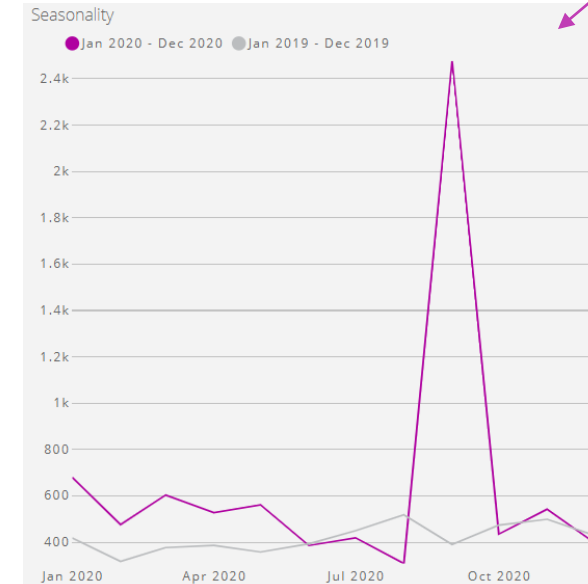
### Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		France	17,591	10.4%
2		Germany	10,780	7.7%
3		Russia	9,814	2.8%
4		Estonia	8,125	86.0%
5		Spain	7,817	56.0%
6		United States	7,175	23.3%
7		Sweden	6,252	12.0%
8		Japan	6,025	68.7%
9		United Kingdom	5,590	26.0%
10		Switzerland	3,296	31.1%

### FINLAND: Global searches for Lakes



### FINLAND: Spanish searches for Lakes





# OUTLOOK ON TRAVEL SENTIMENT AND TRENDS





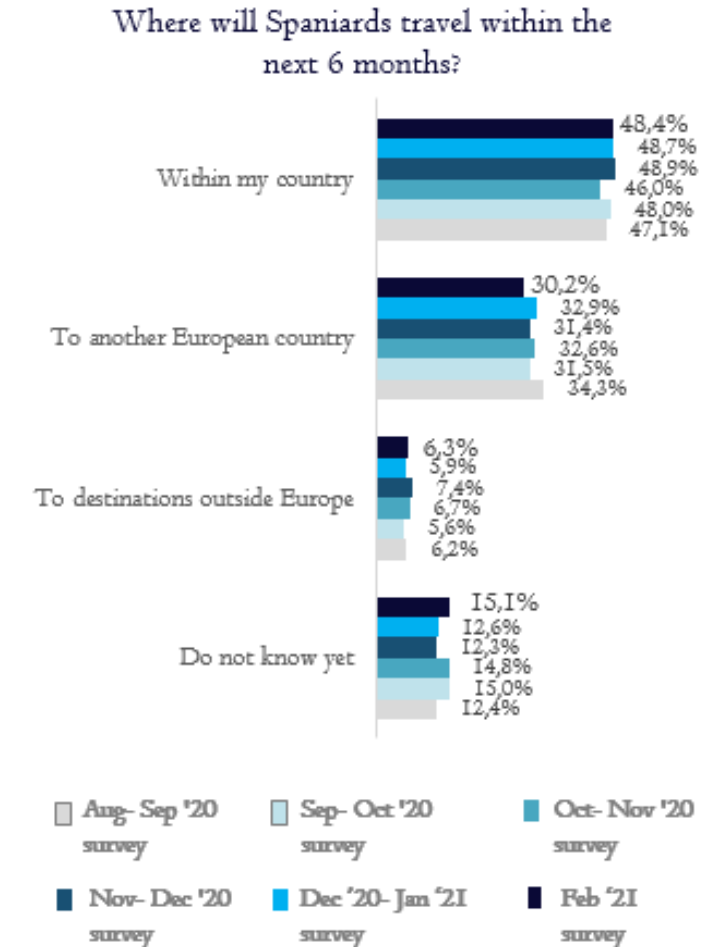
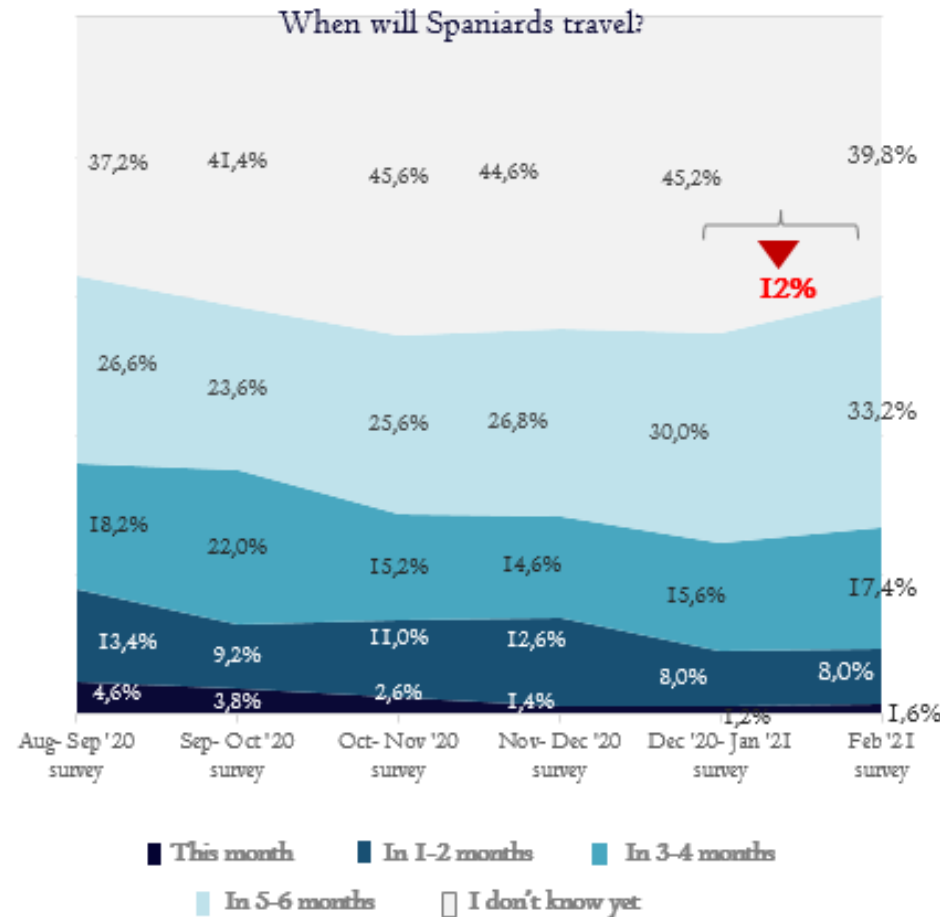
# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## SPAIN

<https://etc-corporate.org/reports/monitoring-sentiment-for-domestic-and-intra-european-travel-wave-6/>

According to the survey conducted in February 2021

- **54% of the Spaniards** responded that they are likely to travel within the next 6 months
- **33%** were looking at **July and August** for their next vacations
- **30%** aim to travel to **another European country** and 48% to remain within their domestic borders



# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## Preferred type of leisure trips during March-August 2021

Preferred type of leisure trip for respondents most likely to travel in the next 6 months



Wave 6 data collected: 5.-19. February 2021; sample= 5,837

Countries included: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria



# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## Travel qualities sought by consumers at the moment

With relaxation, comfort and fun higher on everyone's agenda, COVID-19's grip on travel sentiment begins to slightly loosen

Feb '21 survey



Countries included: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria

# WHAT HAS CHANGED?

## CHANGES IN TRAVELLER BEHAVIOUR IN TIMES OF COVID-19

-short-lived trends or here to stay?-

### Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for '*staycations*' or vacations close to home.

### Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.

### Younger travellers most resilient

#### Change in demographics:

travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.

### New concerns

Health & Safety measures and cancellation policies are consumers' main concerns.

### Last minute

Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.

### More responsible

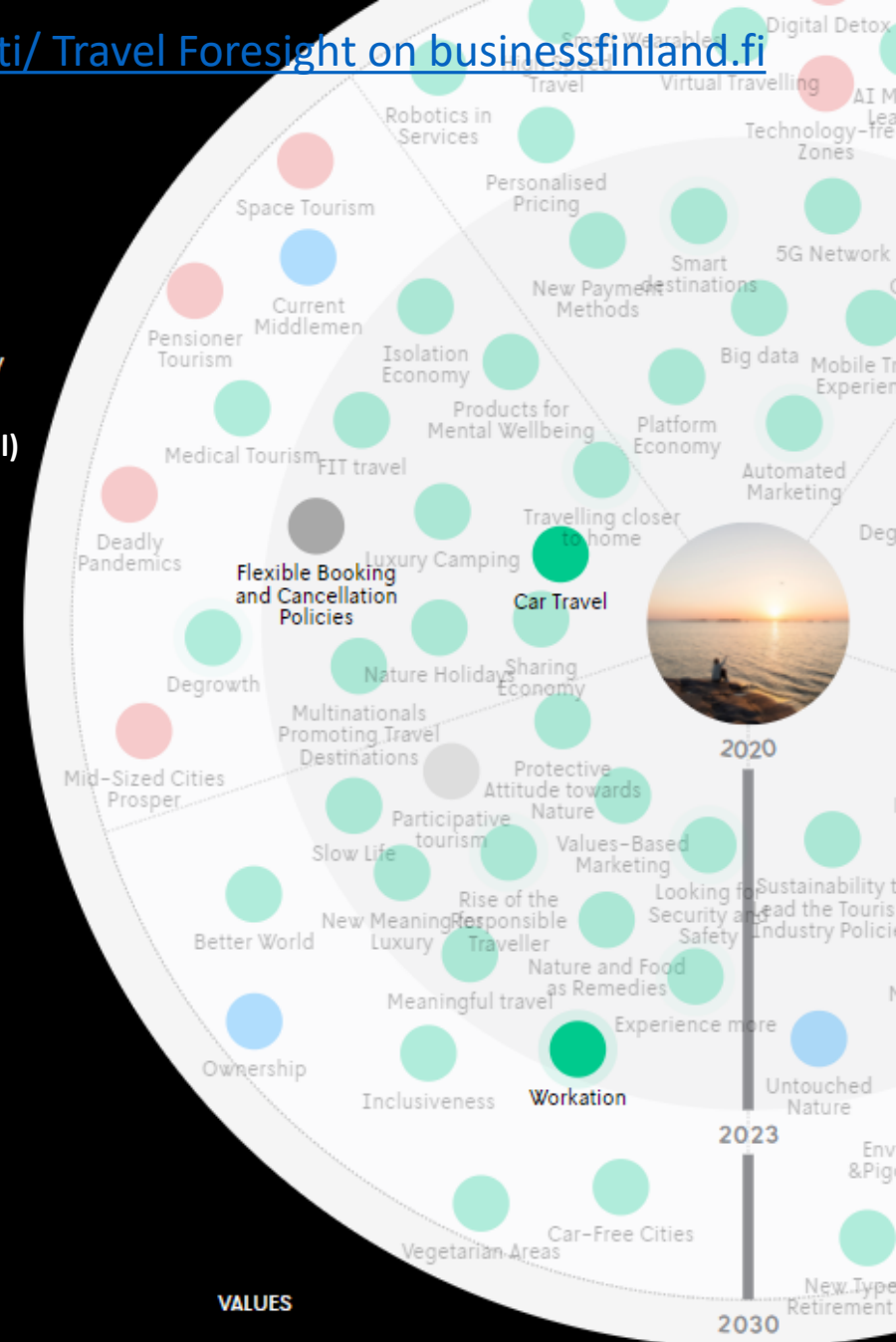
#### Sustainability, authenticity and localhood:

travellers have been giving more importance to creating a positive impact on local communities, increasing looking for authenticity

# Europe & USA future trends

## Important trends affecting travel in Europe & USA

- **CAR TRAVEL > Touring by land** (incl. Car, Camper Van, Train, Bus Travel + Touring in general)
- **WORKATION**
- **EXPERIENCE MORE** (incl. The want to consume more experiences (esp. Post corona) + change of values > refer to values-based marketing)
- **PERSONALISED PRICING > Personalised Services** (+content, liquid services, tailor-made packaging)
- **SUSTAINABILITY MEGATREND**



*Trends* are established phenomena, existing and measurable group of signals, a factor of bigger change.

*Megatrends* refer to bigger change that is usually cross-industrial and implies a visible, long lasting effect.



# Europe & USA future trends

## Workation VF

● Strengthening | 2020-2028  
Crowdsourced: 2022.72



Both working and studying over the internet are continuously increasing in popularity. This trend has led to workations during which the traveller does remote work in the destination. It is believed that if workations become more common, the stays in destinations will also become longer. The boundaries between work-related travel and leisure are becoming vaguer as the digital nomads increase in numbers. Finland has great potential to serve the needs of workationers with excellent internet connectivity, great outdoors and accommodation as well as the atmosphere of the happiest country in the world with high quality of life.



"One Happy Workation": Your office in paradise, Aruba



## Overland Travel & Touring VF

● Strengthening | 2021-2024  
Crowdsourced: 2020.8

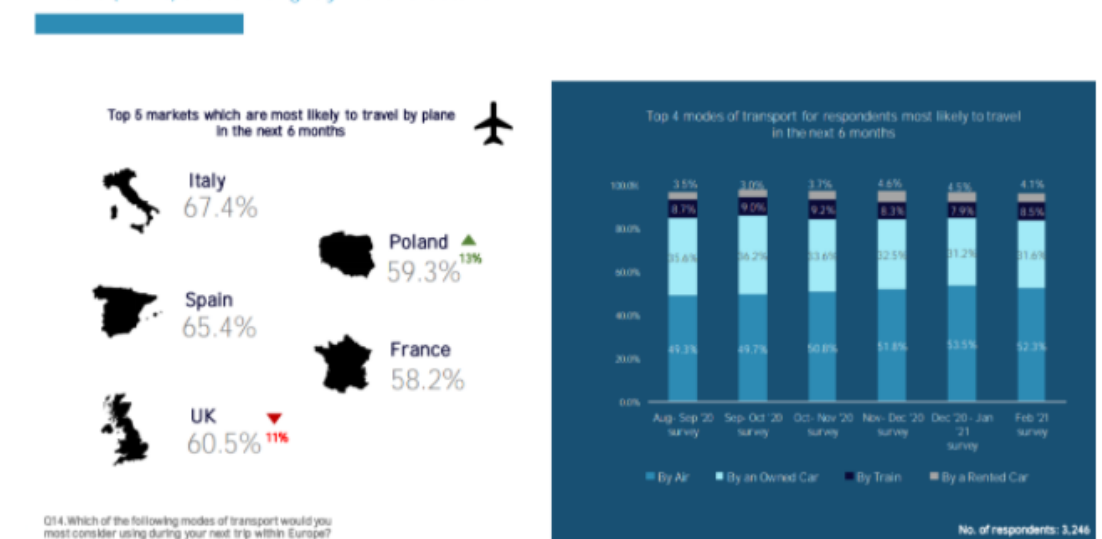


Health concerns and travel restrictions have grown the interest in travelling by land, especially by car or camper van. Driving tours and road trips have become more common and have been regarded as safer and more enjoyable than before. It is anticipated that camper vans will be popular especially among the families with children who want to practice social distancing. Travelling by train or bus has also been promoted as mode of transportation after the pandemic and has to do with travelling to close-by destinations and making responsible choices.

On the other hand, there are signs that air travel would gain more popularity over car travel again, at least among the early bird travellers, as slightly growing proportion of Europeans have said they'd prefer travelling by air (see image, ETC 2021). In the longer term, overland travel including touring by car, camper van, train, bus or bike, is expected to remain a more familiar way of travelling around within the destination as well, possibly more so than before.

Monitoring Sentiment for Domestic and Intra-European Travel, wave 6. European Travel Commission (ETC) 2021, pp. 41.

Although more than half of early-bird travellers plan to fly for their next trip, Britons (-11%) are now slightly more reluctant



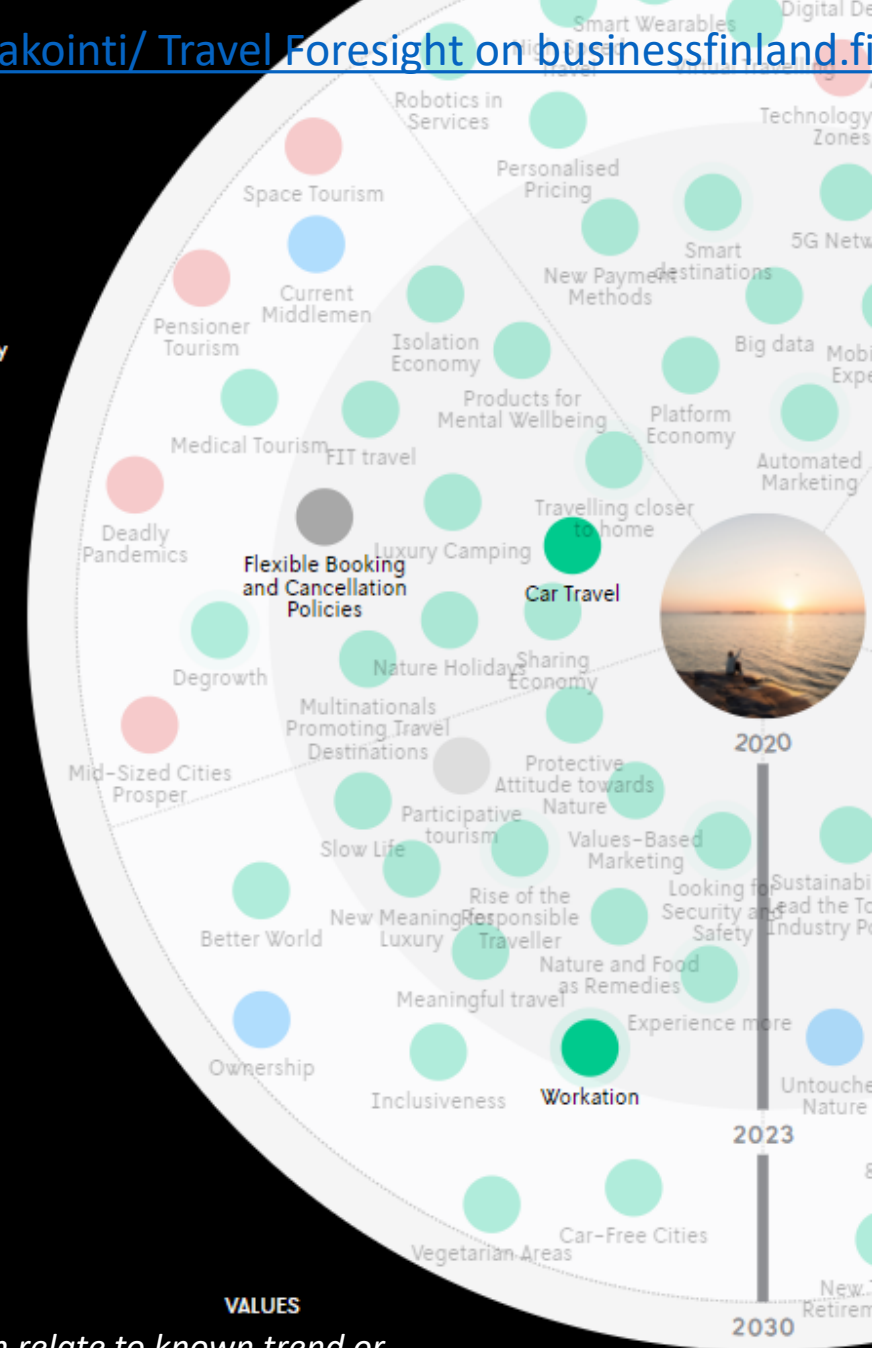


Find out more: [Matkailun ennakointi/](https://matkailun.ennakointi.fi/) [Travel Foresight on businessfinland.fi](https://travel.foresight.on.businessfinland.fi/)

# Europe & USA future change signals

Weak signals of change affecting travel in Europe & USA

- FLEXIBLE BOOKING AND CANCELLATION POLICIES
- HEALING TRAVEL
- COTTAGE HOLIDAYS
- VIDEO AS MEDIUM FOR MARKETING

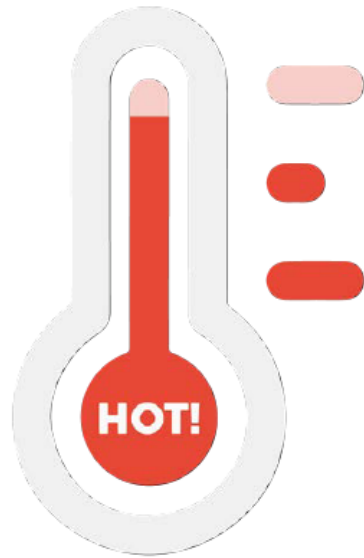








**Weak signals** are smaller change phenomena, often single cases or observations of our time, that can relate to known trend or be a signal of something new, still emerging and uncertain change. In time, these signals might turn into trends or fade out.

# Strengthening travel motivations for nature-oriented travellers



## Hot Trending Consumer Motivations for Adventure Travel



-  1. New Experiences
-  2. Go Off the Beaten Track
-  3. To Travel Like a Local
-  4. Cultural Encounters
-  5. Wellness/Betterment Goals
-  6. Last Chance Travel

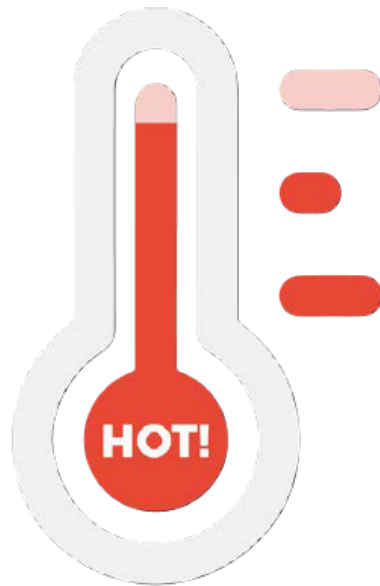
**Q13:** What is your organization's perception of the following consumer motivations, based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I

# Trending trip types for nature-oriented travellers

## “Hot” Trending High-Demand Trips



1. Custom Itineraries
2. Greener/Sustainable/Low Impact Itineraries
3. Electric Bike Itineraries
4. Expert or Specialist-Guided Trips
5. Remote Destinations/Trails
6. Wellness and Mindfulness Itineraries
7. Self-Guides

**Q12:** What is your organization's perception of the following itinerary trends based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I



**Visit Finland**