

France



Sanna Tuononen 18.10.22



Visit Finland

Visit Finland France market team

Heli Saari, Global Sales Promotion

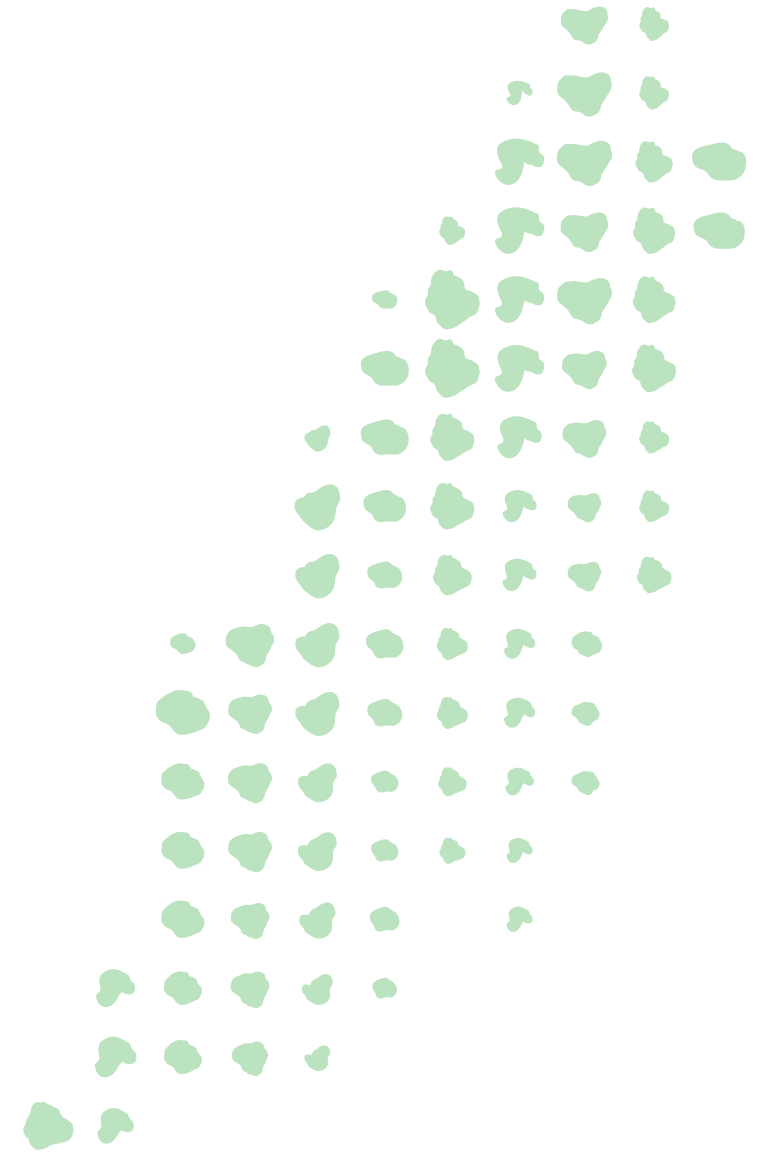
Sanna Tuononen, International Operations

Virva Katajala, MarCom

Eevakaisa Mölsä, PR

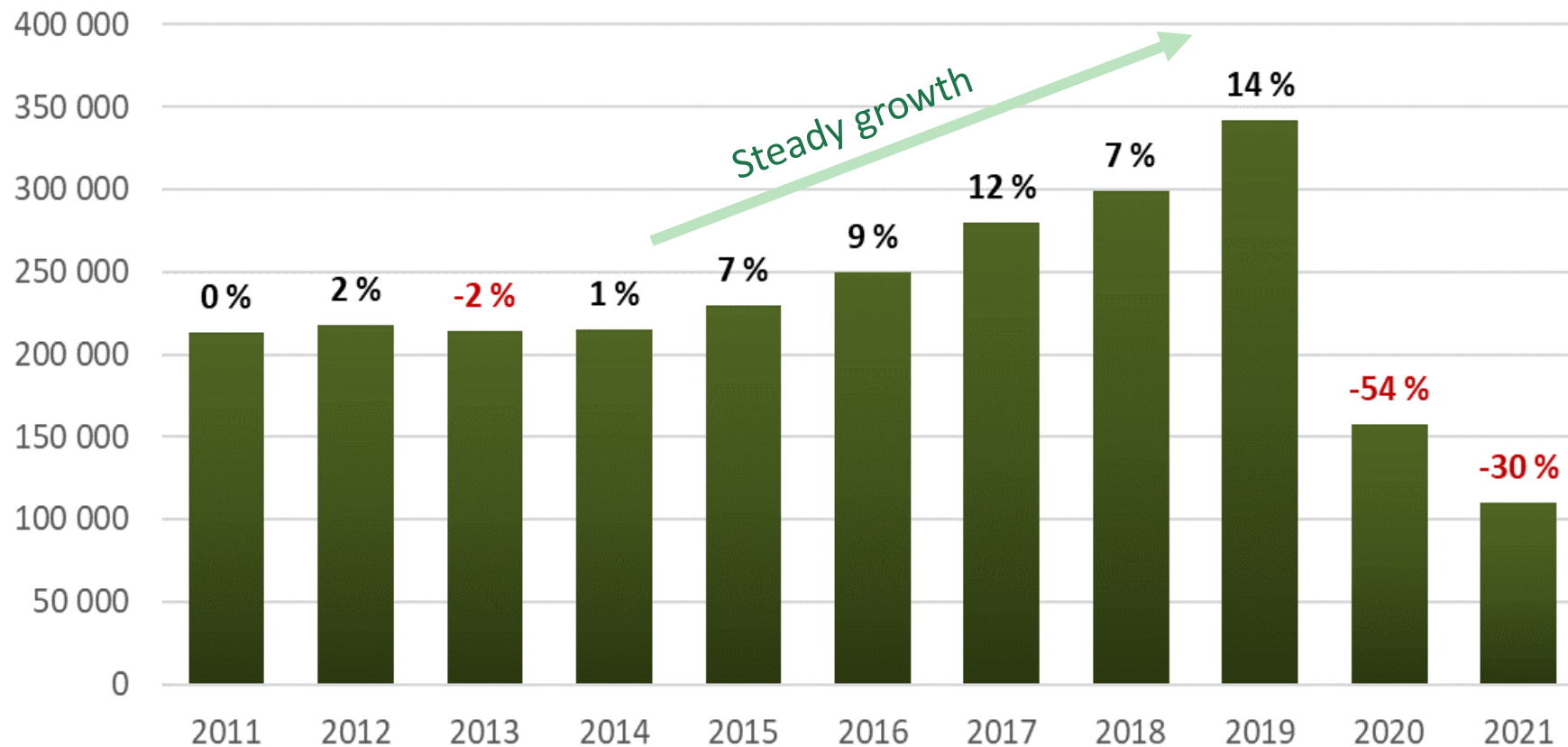
Susanne Heikkinen, Business Intelligence

Susanna Markkola, Business Development



Market Insight France

France – Overnights in Finland 2011-2021



2021

110,000 nights
No. 5 in rankings

YoY change -30%

2019

173,800 nights
2021 vs. 2019 -68%

Total overnights Jan-Aug22 :

239,800

-6% vs. Jan-Aug19

France – Cumulative overnights in Jan-Aug 2022

Area	Nationality	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
1 Whole Finland	Germany	81,420	55 ▲	432,775	228 ▲
	Sweden	72,744	133 ▲	340,215	290 ▲
	France	22,904	94 ▲	239,838	771 ▲
	United Kingdom	27,699	251 ▲	206,335	741 ▲
	Netherlands	19,874	66 ▲	198,193	541 ▲
	United States	34,569	204 ▲	172,988	308 ▲
	Estonia	23,524	17 ▲	129,568	48 ▲
	Switzerland	15,026	40 ▲	114,515	373 ▲
	Norway	18,451	222 ▲	110,406	427 ▲
	Italy	22,307	105 ▲	101,923	288 ▲
	Spain	20,839	127 ▲	89,598	286 ▲
	Russia	38,680	857 ▲	82,192	368 ▲
	Belgium	7,291	80 ▲	80,044	687 ▲
	Denmark	9,469	58 ▲	70,981	272 ▲
	Poland	12,853	95 ▲	70,828	137 ▲
	Austria	7,387	48 ▲	47,503	266 ▲
	Israel	5,095	105 ▲	44,360	915 ▲
	Latvia	6,980	105 ▲	40,020	232 ▲
	Czech Republic	4,602	91 ▲	30,965	267 ▲
	Lithuania	5,925	111 ▲	30,417	171 ▲
	Ukraine	5,751	63 ▲	29,200	166 ▲

- France is by far the **3rd biggest** source market in Finland, with over **239,800** French overnights so far this year
- Last year (2021) France was the **5th biggest** source market and in **2019**, France was the **6th biggest** source market

Top markets in winter season 2022

And change compared to pre-pandemic

High winter season (12-02)

	Dec2018- Feb2019	Dec2021- Feb2022	Change 2022 vs. 2019
United Kingdom	334 900	278 600	-17 %
France	161 700	180 300	+11 %
Germany	151 300	133 100	-12 %
Netherlands	106 700	111 300	+4 %
Spain	59 400	55 300	-7 %
Estonia	58 200	47 400	-19 %
Belgium	30 300	45 900	+51 %
Italy	42 900	45 200	+5 %
United States	53 800	39 600	-26 %
Switzerland	51 800	37 800	-27 %
Sweden	75 100	30 200	-60 %
Poland	21 900	21 500	-2 %
Denmark	21 200	17 100	-20 %
Russia	261 300	16 100	-94 %
Austria	19 500	15 900	-18 %
China & Hong Kong	139 700	14 800	-89 %

Top destinations from France

Winter 2021-2022

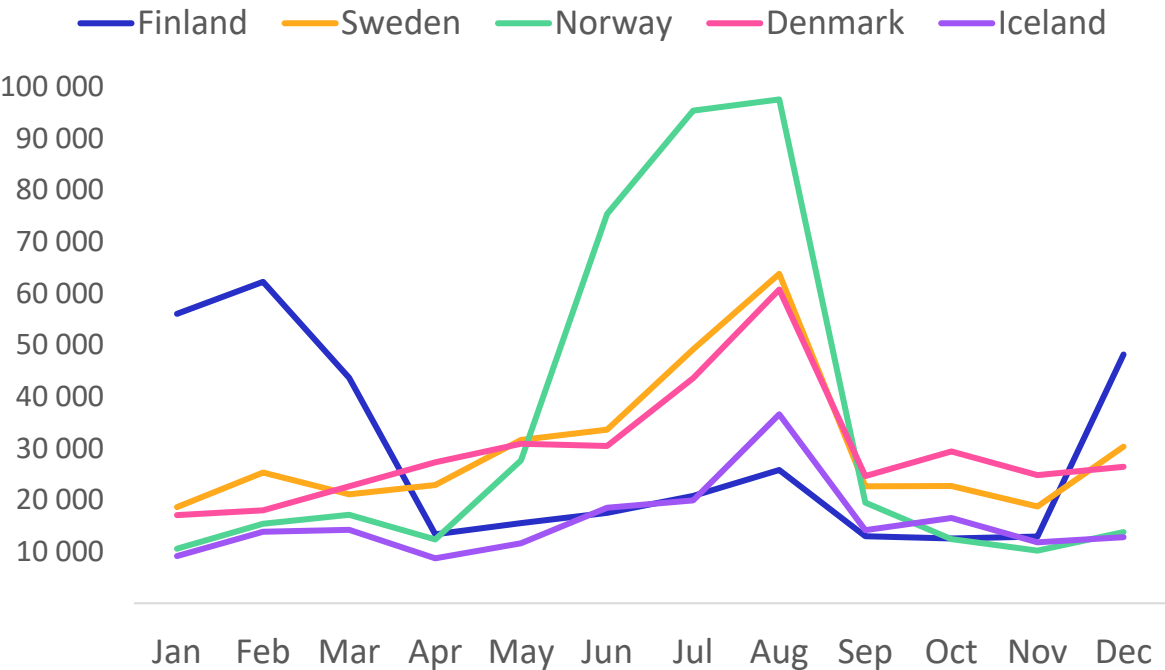
Rovaniemi	38 200
Inari (Saariselkä)	29 800
Kolari (Ylläs)	20 000
Kittilä (Levi)	18 600
Muonio	17 000

Winter 2018-2019

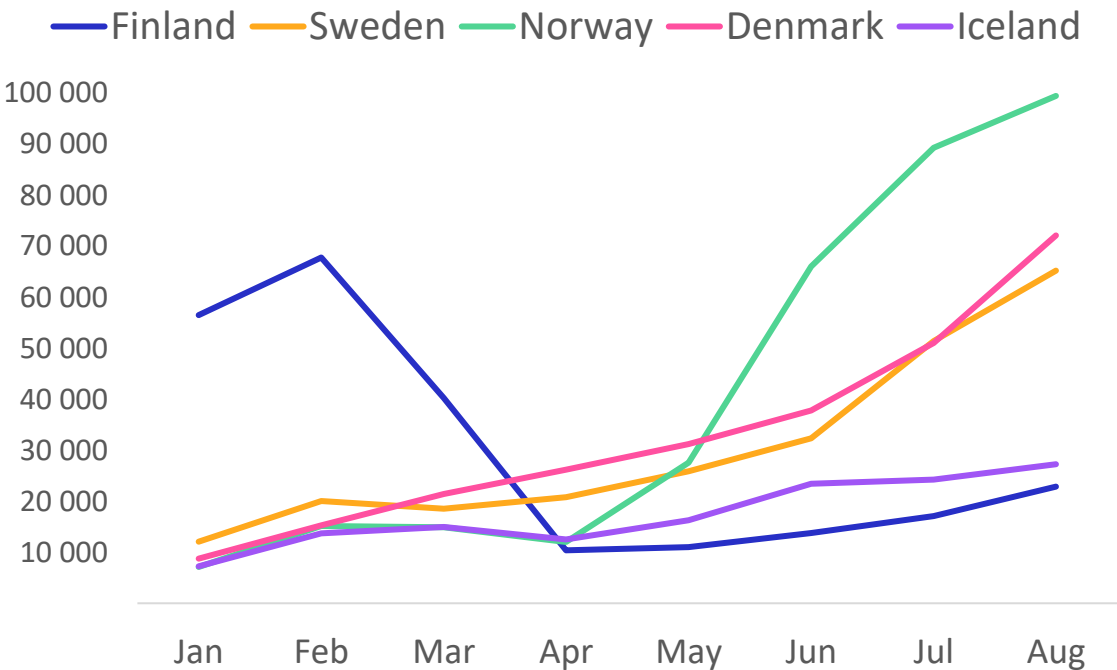
Rovaniemi	26 600
Inari (Saariselkä)	23 200
Kolari (Ylläs)	18 700
Muonio	18 600
Kittilä (Levi)	15 100

France – Overnights in Nordics (Jan-Aug 2022)

French overnights in 2019



French overnights in 2022*



➤ *Visiting the Finnish Lapland in winter or the Norwegian fjords in summer are clearly the most preferred holidays within the Nordics among the French*

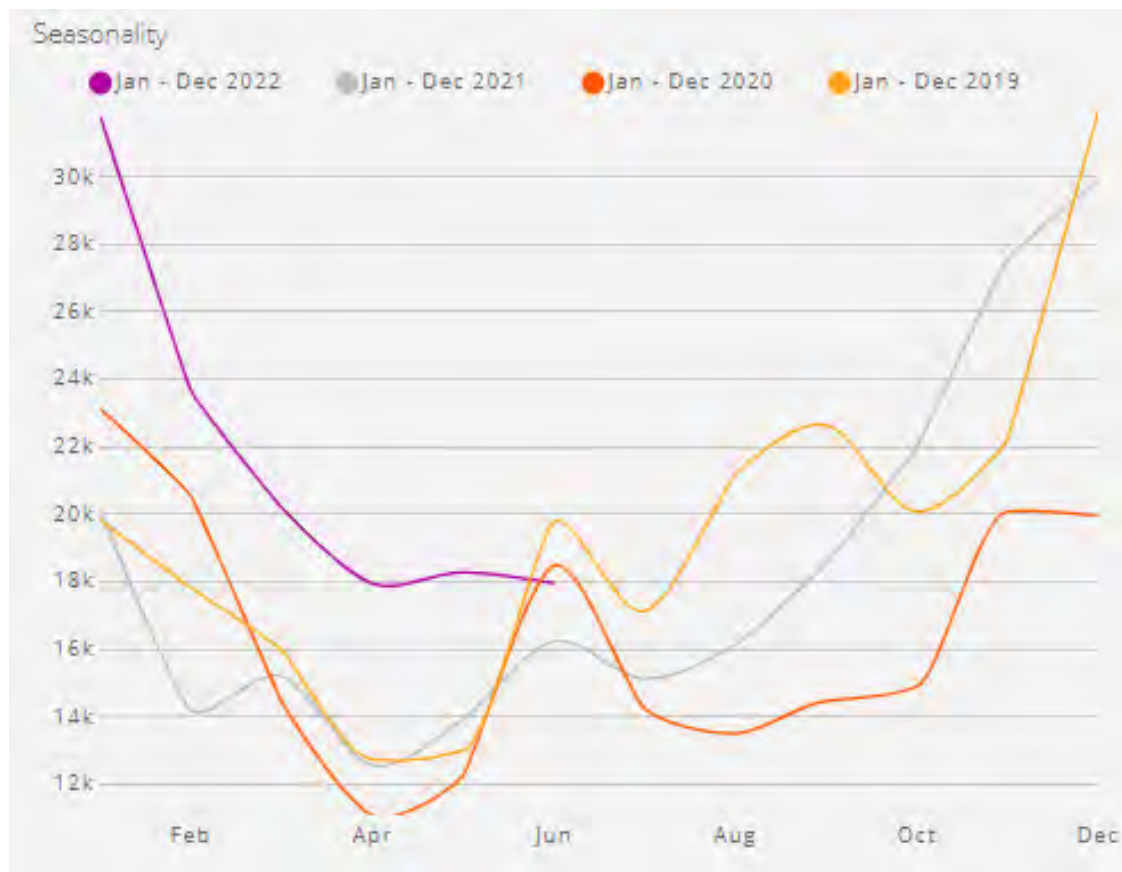
Change % 2022/2019	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Share of total:
Finland	1 %	9 %	-8 %	-22 %	-29 %	-21 %	-18 %	-11 %	Finland: 20%
Sweden	-35 %	-21 %	-12 %	-9 %	-18 %	-4 %	5 %	2 %	Sweden: 20%
Norway	-32 %	-2 %	-13 %	-3 %	0 %	-12 %	-6 %	2 %	Norway: 27%
Denmark	-48 %	-15 %	-5 %	-4 %	1 %	24 %	17 %	19 %	Denmark: 22%
Iceland	-21 %	-1 %	5 %	43 %	40 %	26 %	22 %	-25 %	Iceland: 11%



Digital Demand – Travel Related Internet Searches

Q1/2022 & Q2/2022

France: Searches in Q1 & Q2 2022



Q1/2022

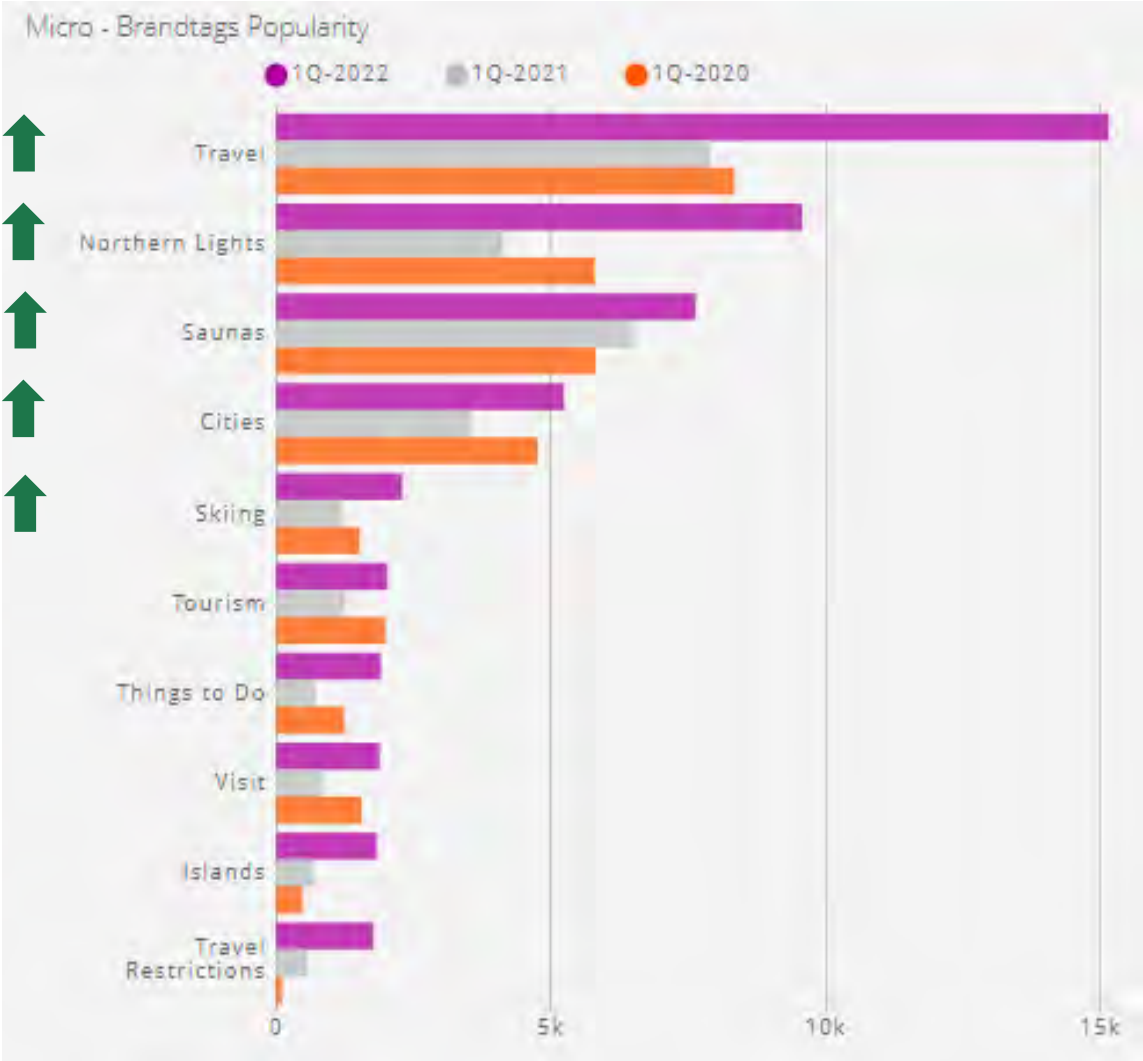
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%
9		Estonia	48,181	26.1%
10		India	39,253	20.4%

Q2/2022

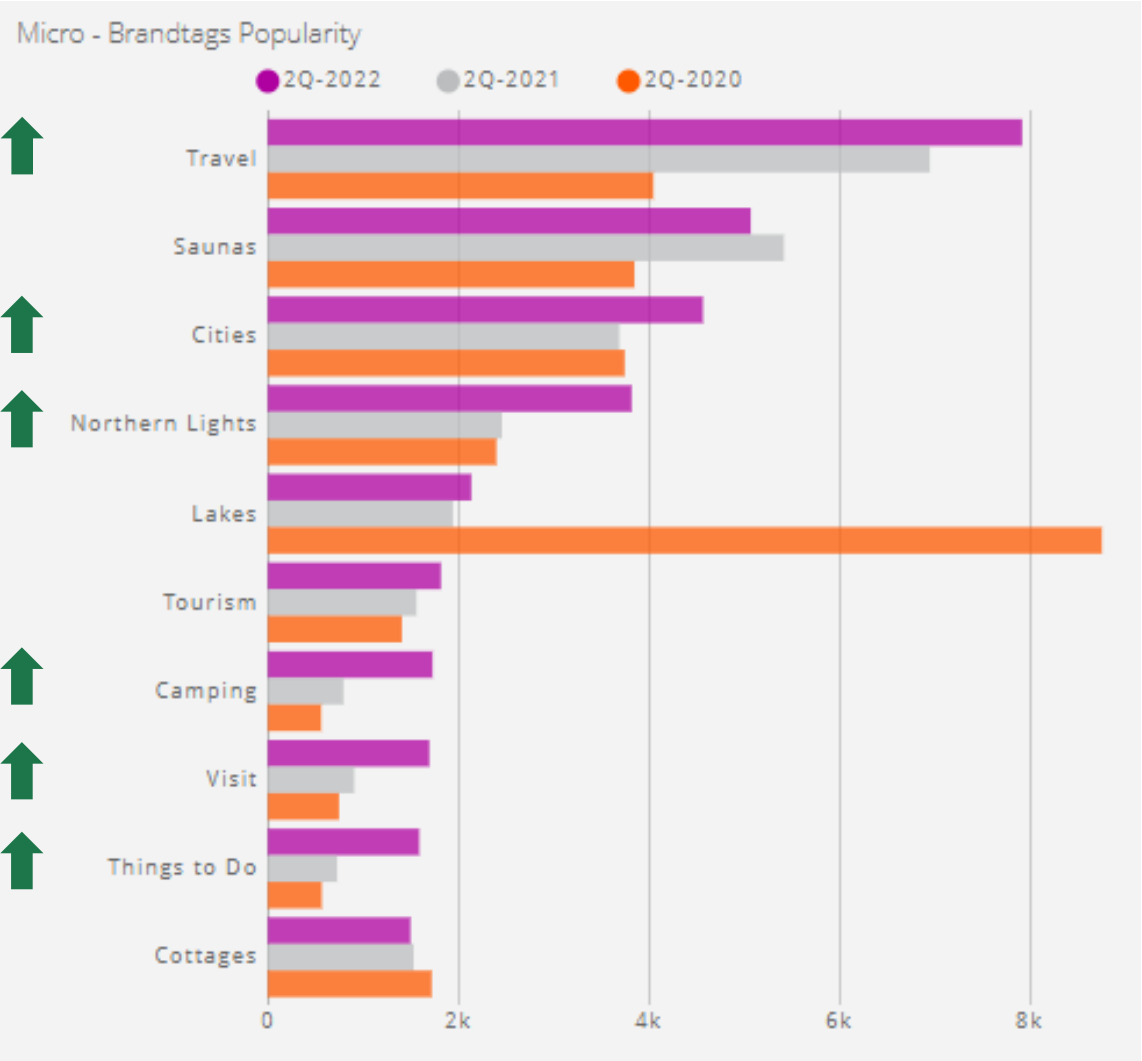
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		United States	134,907	39.5%
2		Japan	119,932	16.7%
3		Germany	113,935	9.1%
4		United Kingdom	68,831	27.8%
5		Italy	59,885	15.9%
6		France	54,190	26.7%
7		Spain	52,910	35.9%
8		Estonia	41,686	11.6%
9		India	38,792	2.9%
10		Sweden	37,606	18.8%

France: Most searched topics

Q1/2022



Q2/2022





ForwardKeys

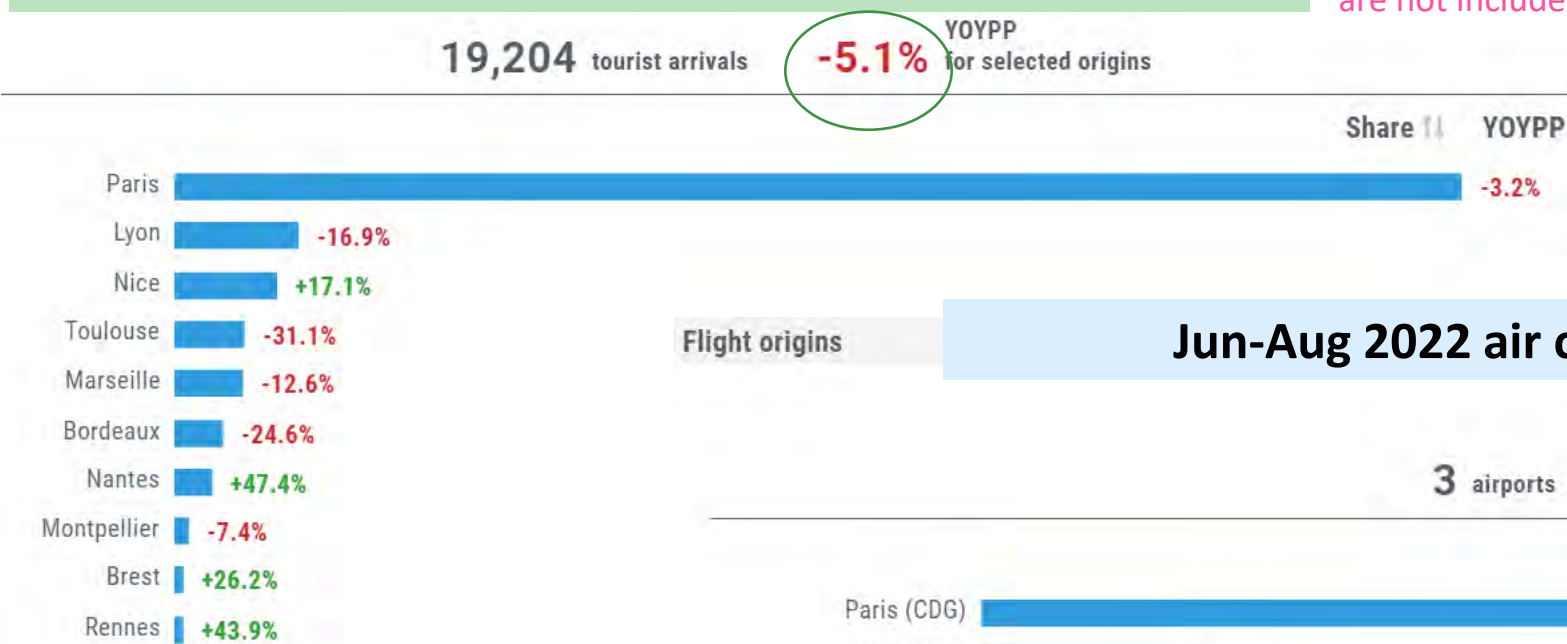
Air travel & Seat capacity

Air arrivals & seat capacity from France – summer 2022

Comparison with pre-pandemic

Main origins of Jun-Aug 2022 air arrivals from France

Please note! Bookings for Ryanair are not included



Flight origins

Jun-Aug 2022 air capacity from France



Operating airlines



Air bookings for November 2022-March 2023

Comparison with pre-pandemic

Please note! Bookings for Ryanair are not included

Bookings from November 2022 to March 2023



Destination benchmark
YOYPP of tourist arrivals

French arrivals / bookings vs. pre-pandemic



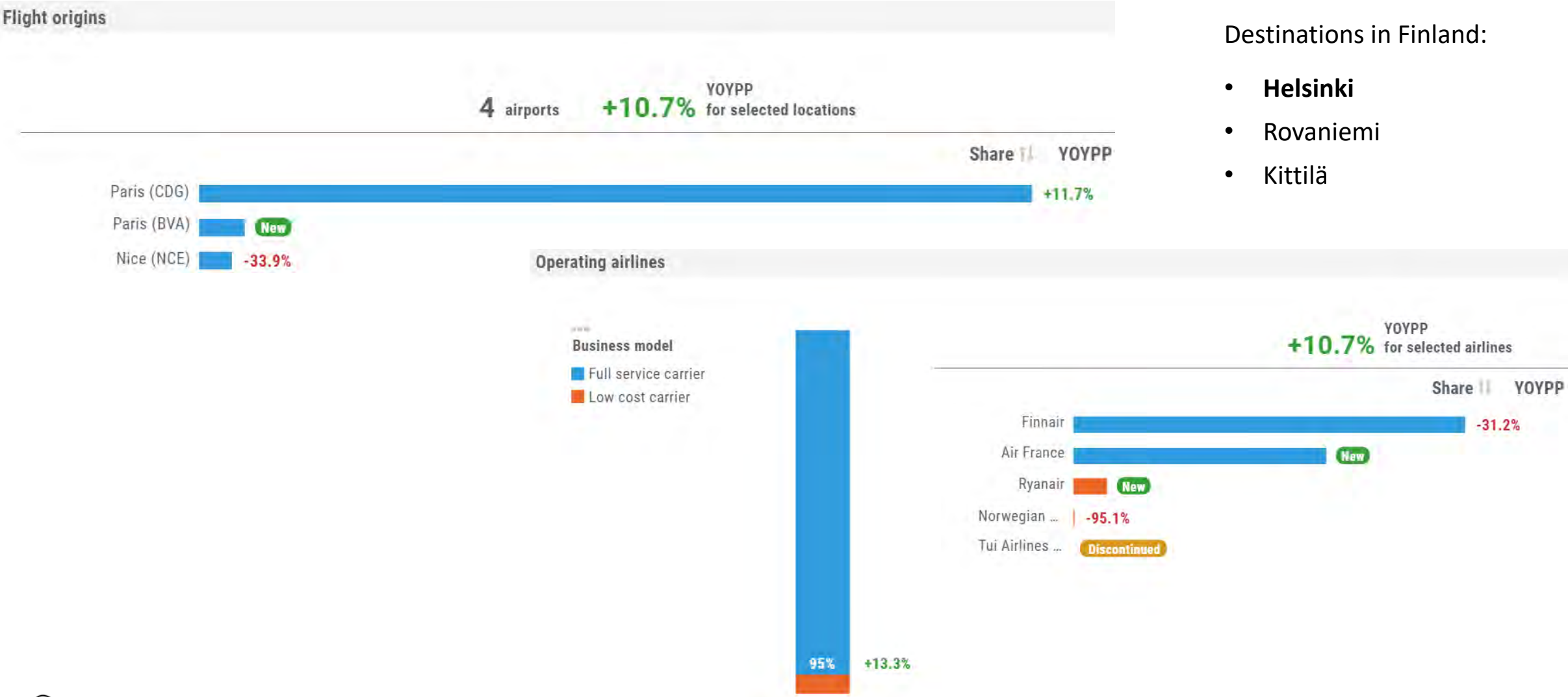
Bookings from France / November 2022 - March 2023

	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
Finland	2 005	4 287	1 380	1 766	399
Norway	1 671	2 407	666	974	418
Sweden	2 027	2 692	329	331	127

	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
Finland	30 %	1 %	13 %	6 %	7 %
Norway	4 %	14 %	25 %	0 %	53 %
Sweden	8 %	-2 %	-4 %	2 %	22 %

Seat capacity Nov/2022 – Mar/2023

Comparison with pre-pandemic **France** to Finland



Destinations in Finland:

- **Helsinki**
- Rovaniemi
- Kittilä



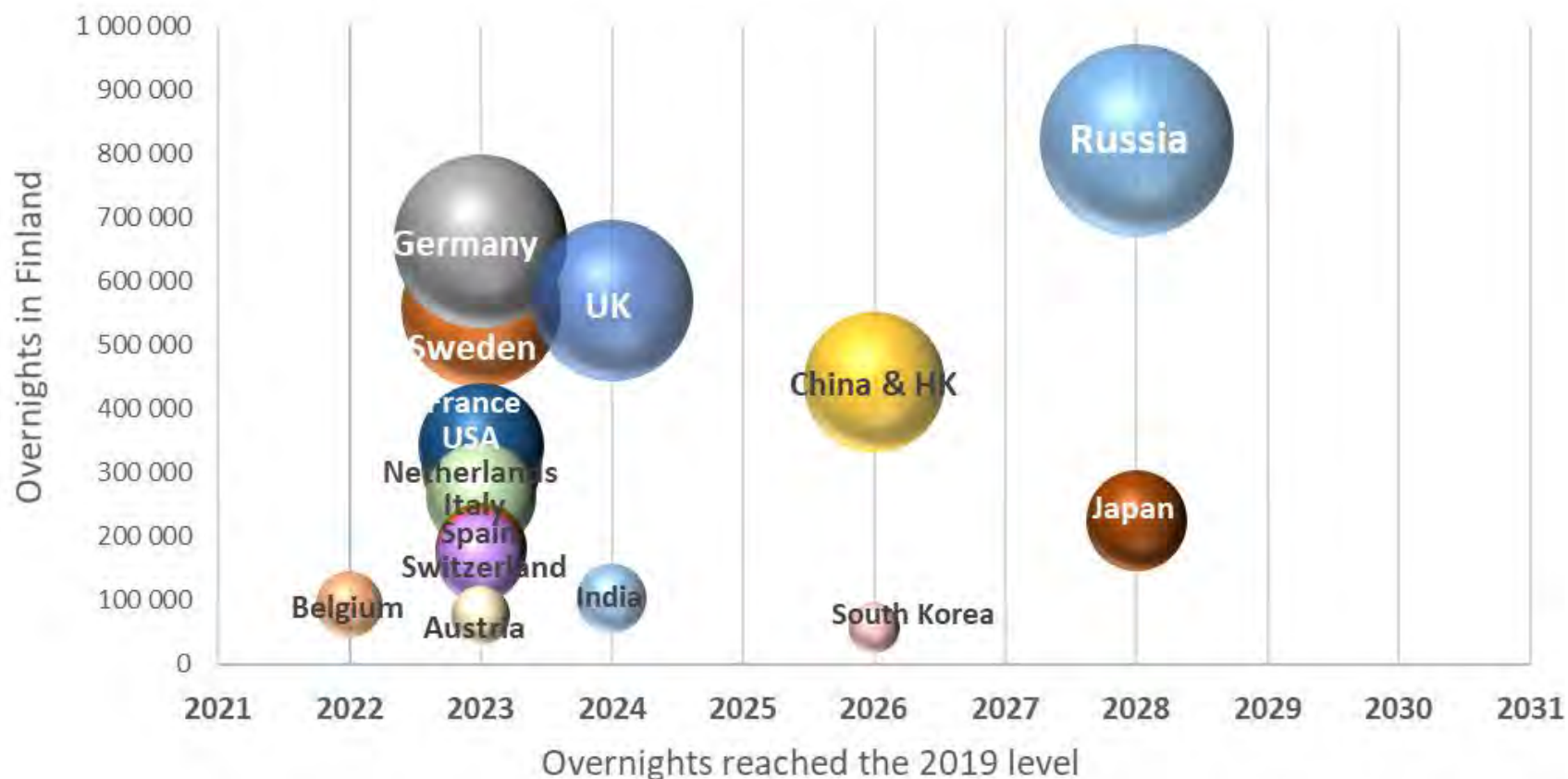
Oxford Economics – Overnights & Spending

Recovery forecasts

Overnights – Recovery to 2019 levels

Databank update June/2022

Recovery timeline - Overnights in Finland reached the level of 2019



Source: Oxford Economics, databank update Jun 30, 2022

	No. of overnights in 2023	comp.to 2019
Germany	691 400	4 %
Sweden	562 000	1 %
UK	556 200	-2 %
France	392 400	15 %
USA	323 100	5 %
Netherlands	308 500	18 %
Russia	215 300	-74 %
Italy	205 100	14 %
Spain	186 100	7 %
Switzerland	167 400	1 %
China	149 800	-66 %
Belgium	122 200	30 %
Japan	87 800	-61 %
India	84 000	-18 %
Austria	79 200	4 %
South Korea	27 600	-51 %

Spending – Recovery to 2019 levels

Databank update June/2022



Source: Oxford Economics, databank update Jun 30, 2022

	Spending in 2023 (Million US\$)	comp.to 2019
Sweden	302,0	14 %
Germany	301,9	9 %
UK	236,0	-1 %
France	182,4	20 %
United States	147,8	10 %
China	130,8	-57 %
Netherlands	123,4	20 %
Russia	108,7	-72 %
Italy	91,7	19 %
Spain	87,1	12 %
Switzerland	70,3	5 %
Belgium	52,6	37 %
Japan	39,2	-59 %
Austria	37,0	10 %
India	35,7	-12 %
South Korea	14,4	-46 %

Market strategy - France

Why this market?

VF.fi website: [Ranska - Business Finland](#)

- **Winter season is very strong** and Finland has the strongest position among Nordic countries.
- There is also an interest and **growth potential** for other seasons (summer and shoulder seasons)
- New flight connections and **better accessibility** (Finnair, Air France and Ryanair). Air France has now 2 direct connections to Lapland (Rovaniemi & Kittilä).
- **French invest in quality services** and use money during their holidays
- **Big and growing interest in Nordics** in France (Nordic culture, design, food, local lifestyle, room to roam etc.)
- **Green and sustainable values growing** – search for nature destinations and relaxing holidays
- **Long winter season** (December-March); French are travelling to Lapland during the whole winter season, not only around Christmas & New Year holidays.

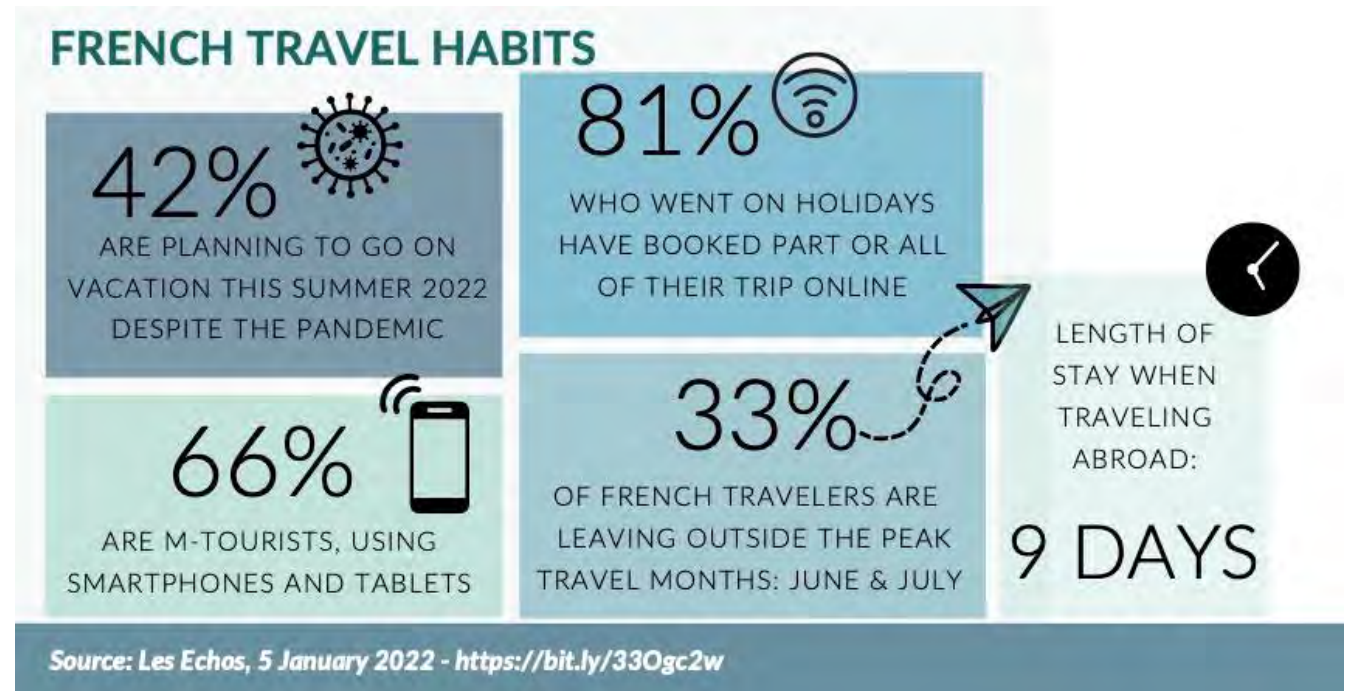
Finland selling points in the market

VF.fi website: [Ranska - Business Finland](#)

- **Easy access to nature** – Clean air and pure nature
- **Activities** – Multiples choices for different outdoor activities all year around
 - Winter activities e.g.: skiing, huskies, northern lights, snowshoeing
 - Summer activities e.g.: trekking, biking, canoeing
 - Special events and happenings; sport events in winter and summer (good PR visibility)
- **Local lifestyle, culture and food** – Happiness from Finland (wellbeing, sauna, local food, cultural offering)
- **Thousands lakes** – Searches for lakes have increased and Lakeland has potential. Combination of nature and wellbeing with a touch of culture
- **Sustainable travel** – more and more important criteria in destination choices and Finland has a strong position as a sustainable destination

Travel trends in France

- Strong willingness and need to travel
 - Less often, but “better”
- Slow tourism & Sustainable tourism
- Wellbeing during holidays
- Live/Do like a local experiences
 - Authentic experiences & destinations
- Bleisure travel
- Booking trends
 - Shorter booking windows
 - Flexibility demanded
 - Good client service & 24/24 availability



Activities France 2023

B2B activities

Sales Events in 2023

- Nordic Workshop in Paris Spring 2023
- Pure Events & Meetings, March 2023
- Road show events with Tour operator partners (Kuoni-Scanditours, Timetours, Univairmer etc.)

Other B2B activities

- Joint Promotion Campaigns
 - Air France Helsinki & Lakeland Summer campaign
 - Timetours /Premium Travel
 - Direct tours – Summer campaign
 - Karavel – Summer campaign
- Learning events for sales teams /agencies



B2B activities

FAM trips in 2023

- Winter famtrip Finland-Norway, February 2023
- Joint Summer famtrip (FR, ES, IT) June 2023: nature, outdoor activities & sustainability
- Autumn famtrip, September 2023: nature, sustainability (Finland & Sweden TBC)
- Individual famtrips / Site inspection trips



Other activities

- Go Nordic Project
- Team Finland work and Country branding
- Yonder Summer campaign



Go Nordic!
Les pays nordiques

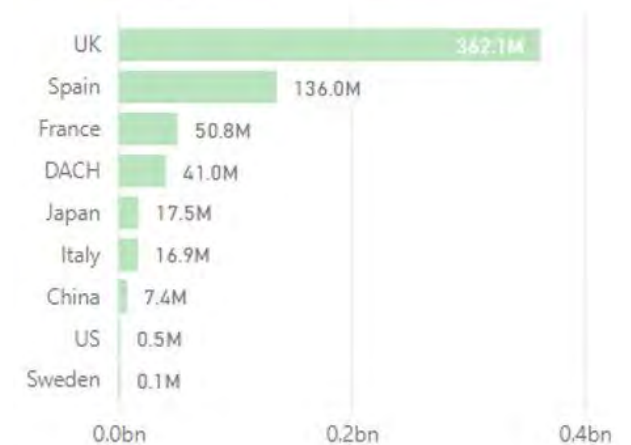
PR France

PR and Media in France in 2022 in results

Goal: To raise awareness for Finland as a sustainable travel destination

- France accounted **third biggest brand building effect 50.8 million** of the all VF monitored countries:
- January-August in total **97** hits (Number of hits by region: Finland in general 62, Helsinki 13, Lakeland 13, and Coast and Archipelago 5)
- Most of them appeared in **Tier 1** with brand Building effect **170** milj.
- Average tone 2.98/3.00, average visibility score 59 %
- Main theme: culture, main Season: spring

Brand Building Effect by Country



- 1.The average Visibility score talks about the attention e.g. an article can be expected to get
- 2.Brand Building Effect is an estimate of the number of media consumers that have seen the article



Examples of coverage

VOYAGER AUTREMENT



Ici, le temps a suspendu son vol

Du littoral aux lacs nichés au cœur de forêts profondes, rien n'a changé dans la Finlande du peintre Akseli Gallen-Kallela. À part les pistes cyclables...

AKSELI GALLÉN-KALLELA (1865-1931) fut l'un des artistes les plus célèbres du pays avant son exil. Il est connu pour ses peintures de paysages de la Finlande, de la Baltique, de la mer et de la nature. Ses œuvres sont exposées dans les musées et les galeries du monde entier.



De la mer à la mer, il n'y a qu'un pas qu'Akseli Gallen-Kallela (1865-1931) faisait d'un bond, comme tout Finlandais qui se respecte. La petite cabane en rondins existe toujours, en contrebas de l'atelier de l'artiste le plus célèbre du pays, transformée en musée dans les années 1950. De l'estrieur, l'impressionnisme, construite en bois selon ses plans, donne déjà un aperçu du caractère fougueux du personnage, éclectique et grand voyageur : bâtiment principal de style traditionnel, toit pentu et tuiles en bois, patio couvert à l'italienne et tour médiévale crénelée. De là-haut, l'homme pouvait méditer face à l'horizon miroitant de la Baltique, découpée en multiples bras de mer et parsemée d'îles. Un siècle plus tard, rien ne change dans le paysage. Les entrées naturelles du littoral autour de la commune d'Espoo, à une vingtaine de kilomètres de Helsinki, se sont transformées en un patchwork de banlieues résidentielles et de zones industrielles, restes discrètes grâce à un plan d'urbanisme strict où rien ne doit dépasser, hormis les clochers et quelques cheminées d'usines. Tout est caché dans la verdure et connecté, entre autres, par un dense réseau de pistes cyclables menant à l'écart des voitures.

En ce jour de printemps frais et ensoleillé, le restaurant, installé en face, dans l'ancienne habitation de la famille, a ressorti les tables dans le jardin. Adorateurs du soleil et du café, les Finlandais dégustent l'un et l'autre avec délectation, visages tournés vers le ciel, évoquant ainsi les personnages silencieux de la peinture du maître des lieux : héros légendaires des mythes fondateurs de la nation naissante, qu'il fut le premier à mettre en images.

Lorsque Akseli Gallen-Kallela naît, en 1865, son pays est encore sous domination suédoise, avant de passer sous la coupe du géant russe. Le Finlandais est alors la langue des paysans, des incultes. Ce sont justement eux qui l'ont aimé, leur force, leur différence, le mystère de leurs terres recouvertes, naissances peuplées d'êtres magiques ou maléfiques dont les histoires, colportées en poèmes chantés de


ELLE

MODE BEAUTE PEOPLE CULTURE SOCIÉTÉ ELLE À TABLE ELLE DÉCO ASTRO PODCAS

Destination Laponie !

Publié le 08 janvier 2022 à 14h35

EDITION ABONNÉES



VOIR LA GALERIE

Destination Laponie I - ©Andrea Mantovani

Media trip (winter): Elle Value of 24 500 e

VOYAGE

10 bonnes raisons de faire une escapade «foodie» dans le sud-ouest de la Finlande

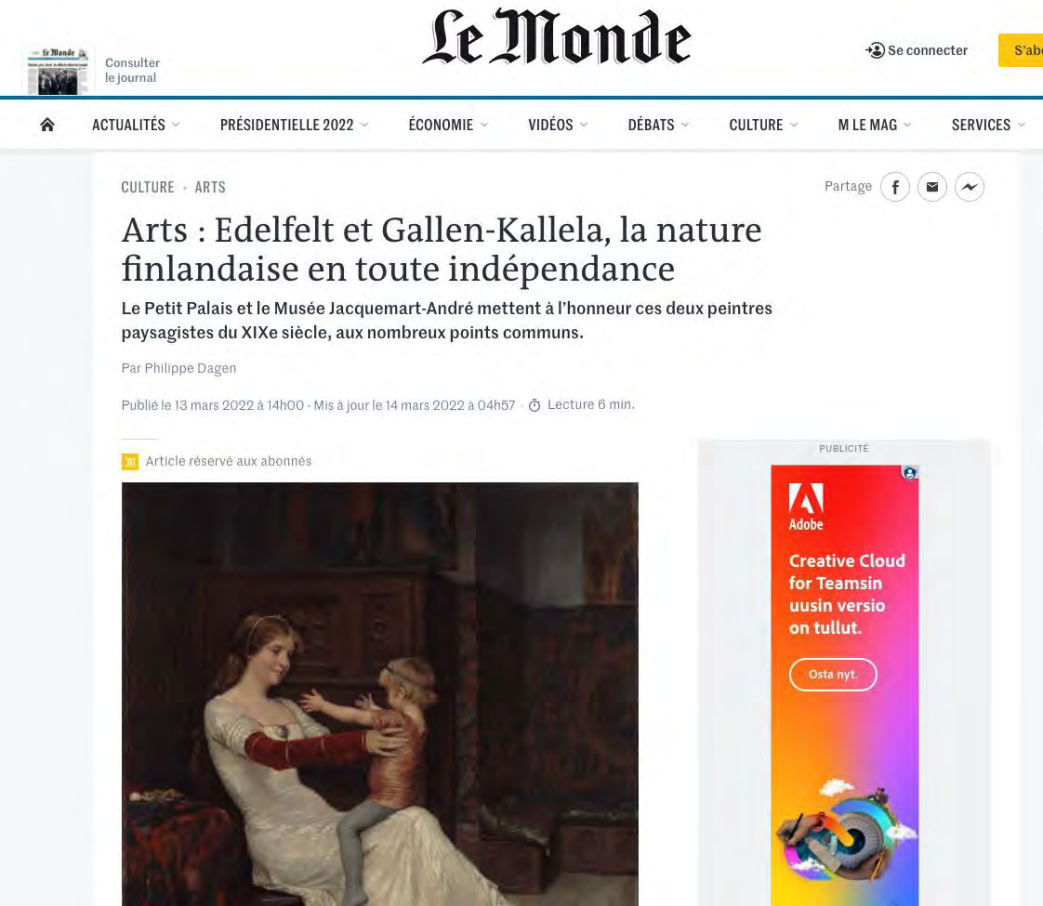


Image d'illustration. © DR

Media trip (food): Paris Match Value of 24 500 e

Examples of coverage

BeauxArts



PR & Media work in 2023

Goal: To raise awareness for Finland as a sustainable travel destination

- **Improve awareness what Finland has to offer.** Cross-media strategy, more TV visibility!
- **Influencer co-operation (new strategy):** To reach more younger audiences (including TIKTOK).
- **To put special focus on content that stands out.**
 - In 2023 we want to create more edgy plan for PR content and trips.
 - More, meaningful influencer co-operating addressing target groups and niche content such as biking, summer cottage, road trips
- **Seasons:** Year-round but stronger input in summer and autumn (ruska and mushrooms)
- **Topics:** Design/Art, Nature/Outdoor, Wellbeing/sauna, Culture, Food and Sport (biking, running etc.)

