



Italy



Visit Finland Spain & Italy market team

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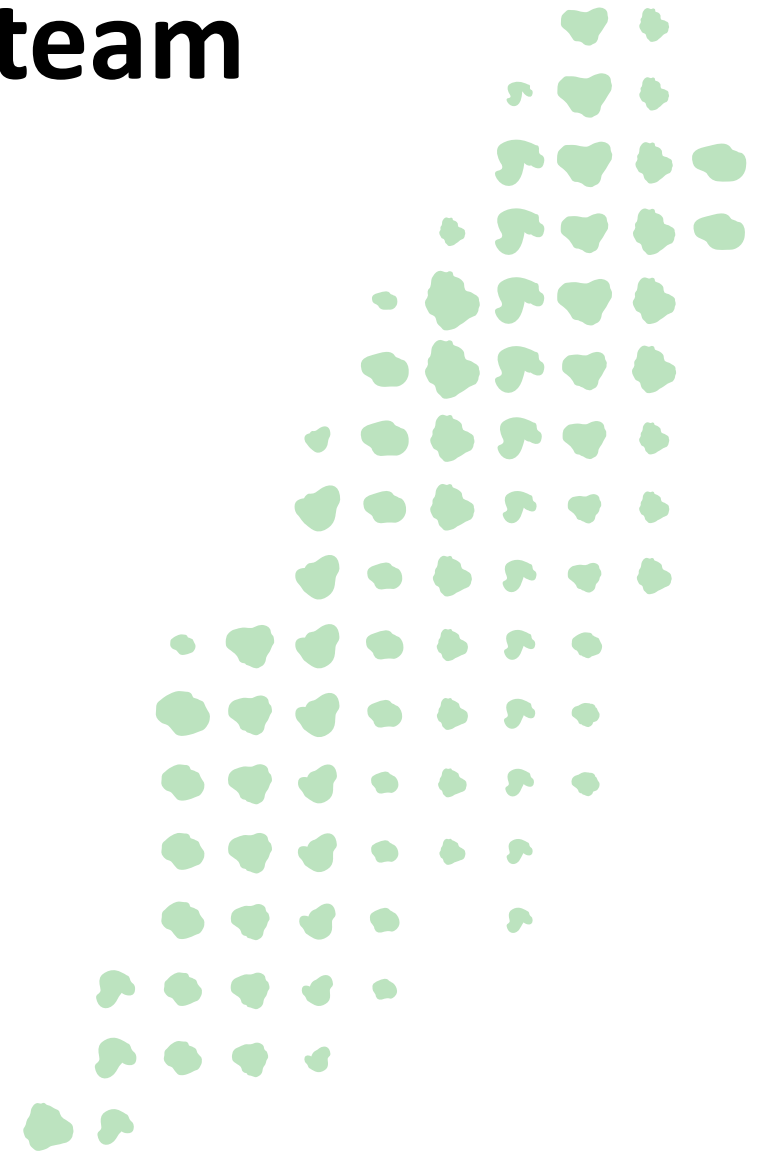
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Meri Sipilä, PR

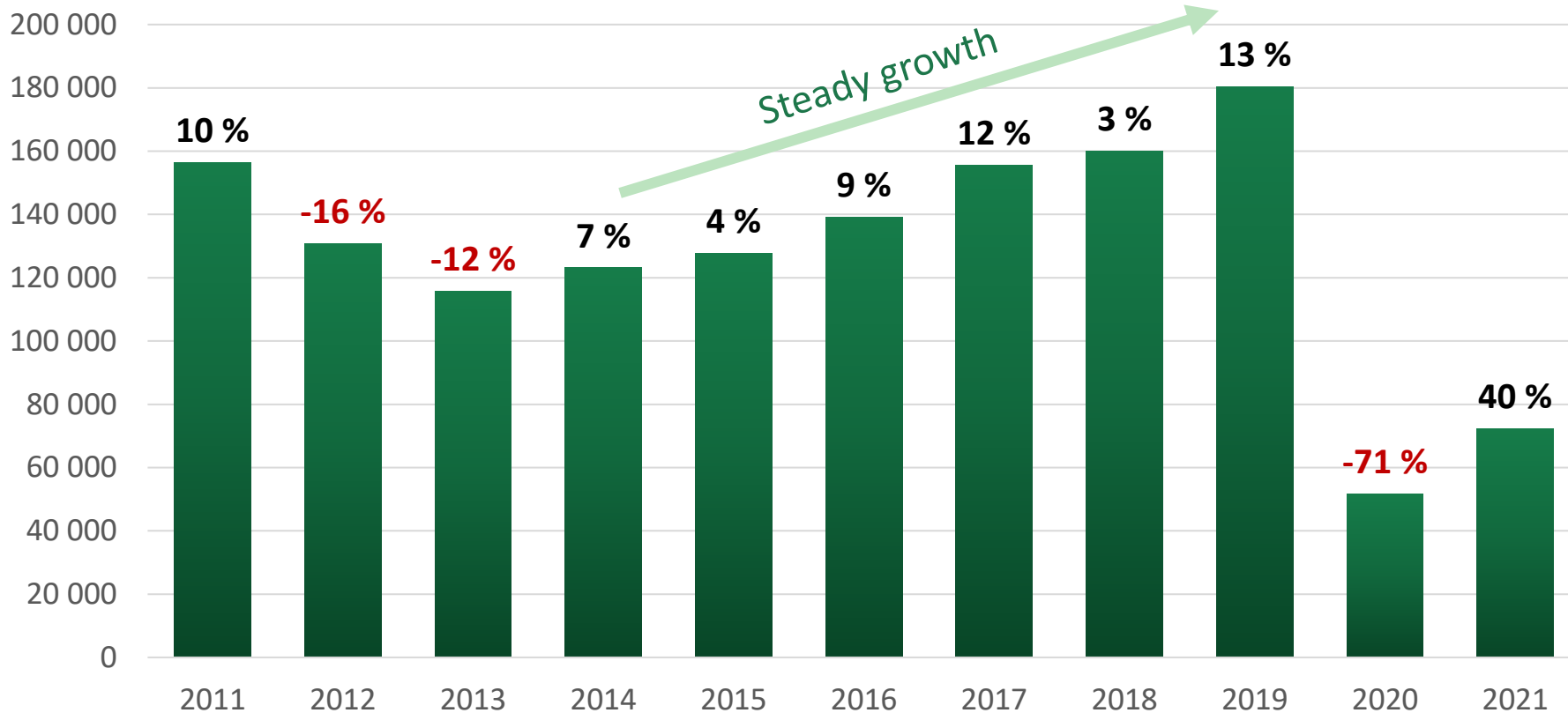
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Market Insights

Italy – Overnights in Finland 2011-2021



2021
72,400 nights
No. 9 in rankings
YoY change +40%

2019
180,300 nights
2021 vs. 2019 -60%

Total overnights Jan-Aug22 :
101,900
-16% vs. Jan-Aug19

Italy – Cumulative overnights in Jan-Aug 2022

Area 1 Whole Finland	Nationality	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
	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 ▲

- **Italy** is by far the **10th biggest** source market in Finland, with over **101,900** Italian overnights so far this year
- **Last year (2021)** Italy was the **9th biggest** source market and in **2019**, Italy was the **12th 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 Italy

Winter 2021-2022

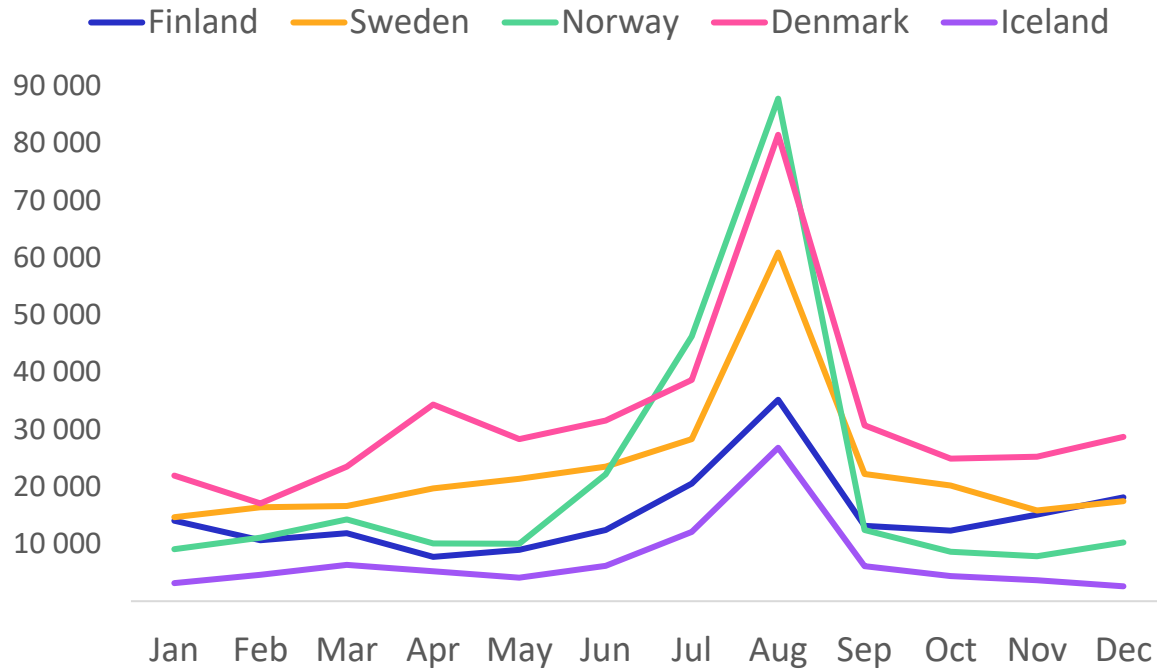
Rovaniemi	15 800
Helsinki	9 400
Inari (Saariselkä)	8 700
Vantaa	2 400
Sodankylä	1 100

Winter 2018-2019

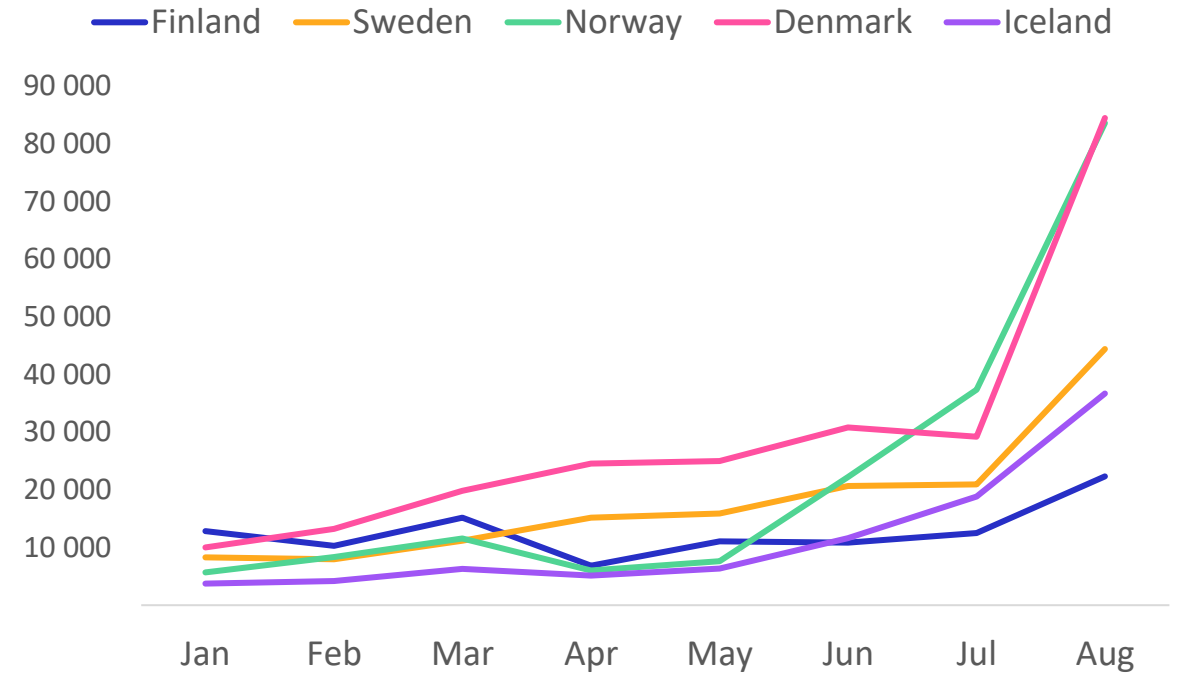
Rovaniemi	11 900
Helsinki	10 900
Inari (Saariselkä)	4 800
Vantaa	2 100
Sodankylä	1 500

Italy – Overnights in Nordics (Jan-Aug 2022)

Italian overnights in 2019



Italian overnights in 2022*



- **August** is clearly the most preferred month for the Italians to travel to the Nordics
- During winter months, Finland stands out with Denmark and Sweden

Change % 2022/2019

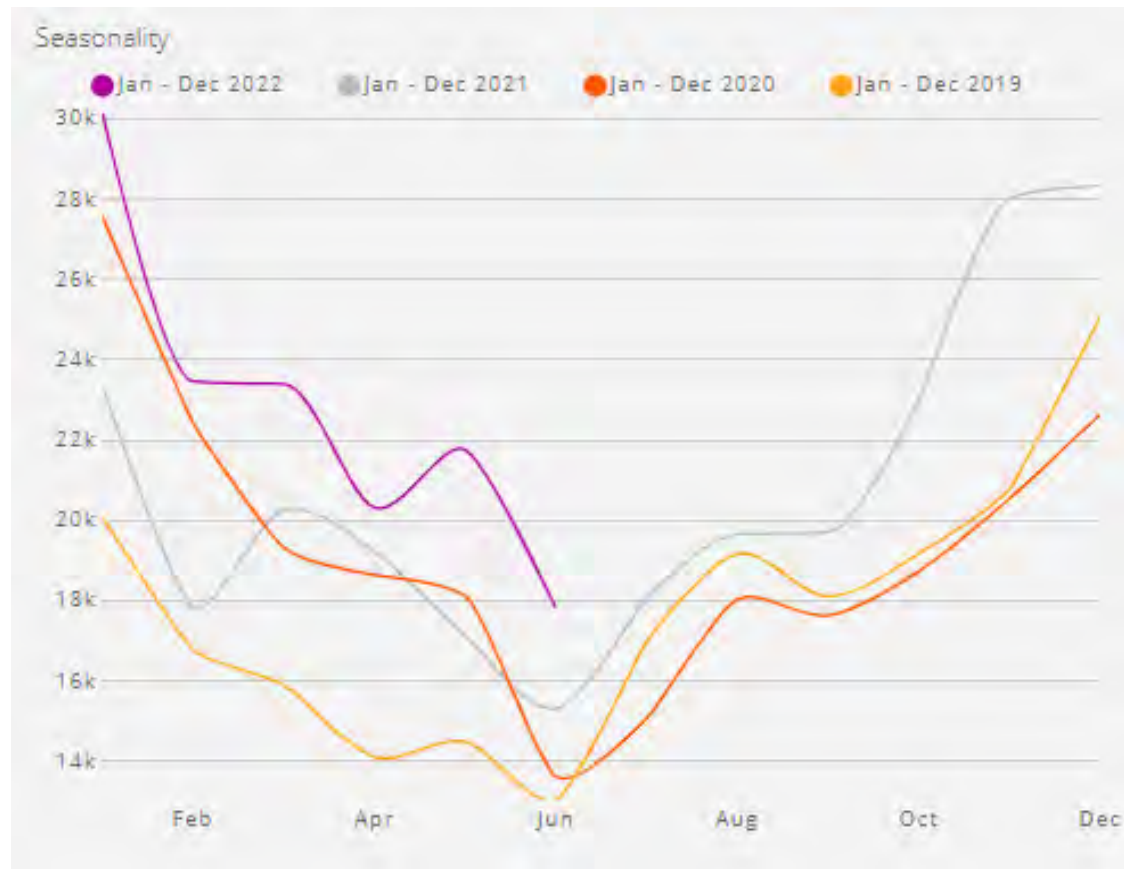
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Share of total:
Finland	-9 %	-3 %	28 %	-12 %	24 %	-13 %	-39 %	-37 %	Finland: 13%
Sweden	-43 %	-51 %	-33 %	-23 %	-26 %	-12 %	-26 %	-27 %	Sweden: 19%
Norway	-37 %	-25 %	-19 %	-40 %	-24 %	0 %	-19 %	-5 %	Norway: 24%
Denmark	-54 %	-23 %	-16 %	-29 %	-12 %	-2 %	-24 %	4 %	Denmark: 31%
Iceland	18 %	-10 %	-1 %	-2 %	53 %	87 %	56 %	37 %	Iceland: 12%



Digital Demand – Travel Related Internet Searches

Q1/2022 & Q2/2022

Italy: Searches in Q1 & Q2 2022



Q1/2022

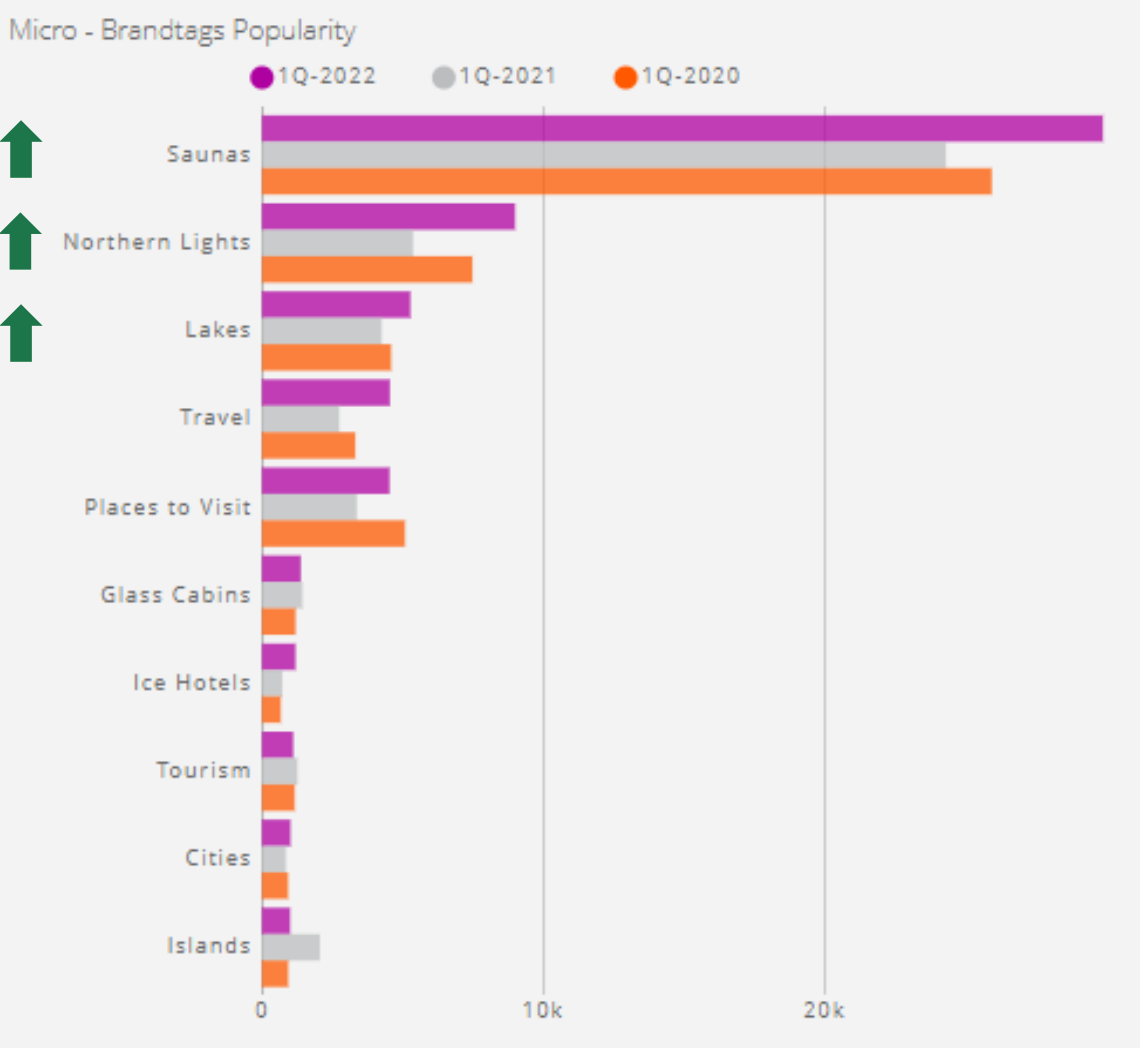
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%
9		Estonia	48,181	26.1%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

Q2/2022

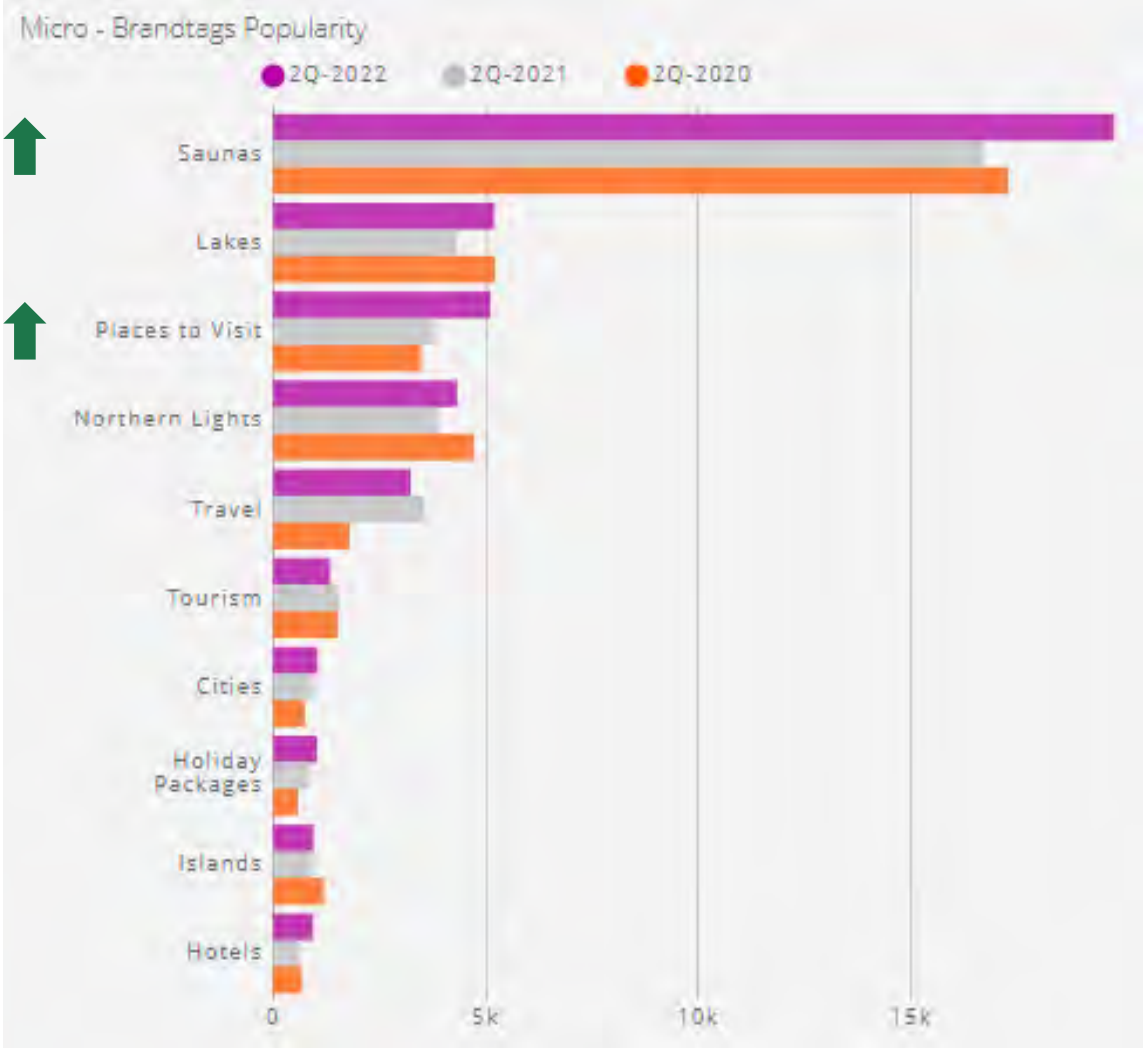
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		United States	134,907	39.5%
2		Japan	119,932	16.7%
3		Germany	113,935	9.1%
4		United Kingdom	68,831	27.8%
5		Italy	59,885	15.9%
6		France	54,190	26.7%
7		Spain	52,910	35.9%
8		Estonia	41,686	11.6%
9		India	38,792	2.9%
10		Sweden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

Italy: Most searched topics

Q1/2022



Q2/2022





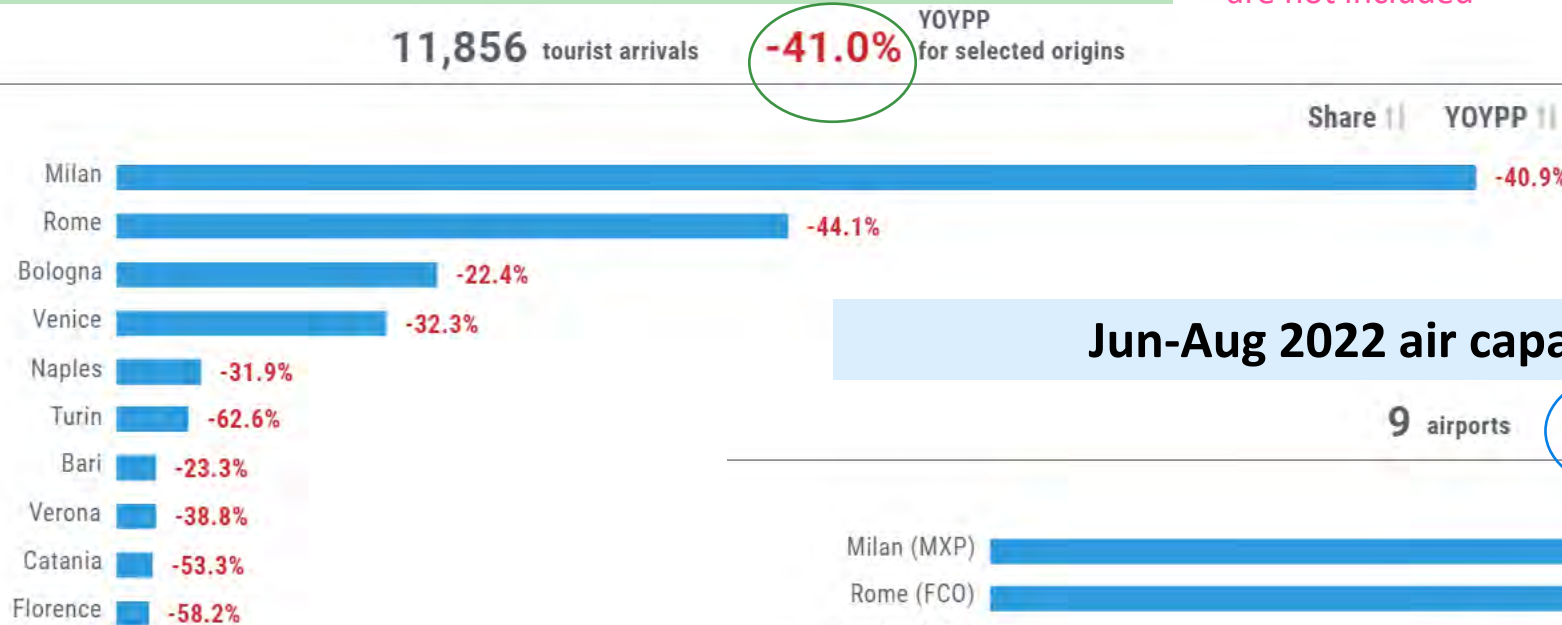
ForwardKeys

Air travel & Seat capacity

Air arrivals & seat capacity from Italy – summer 2022

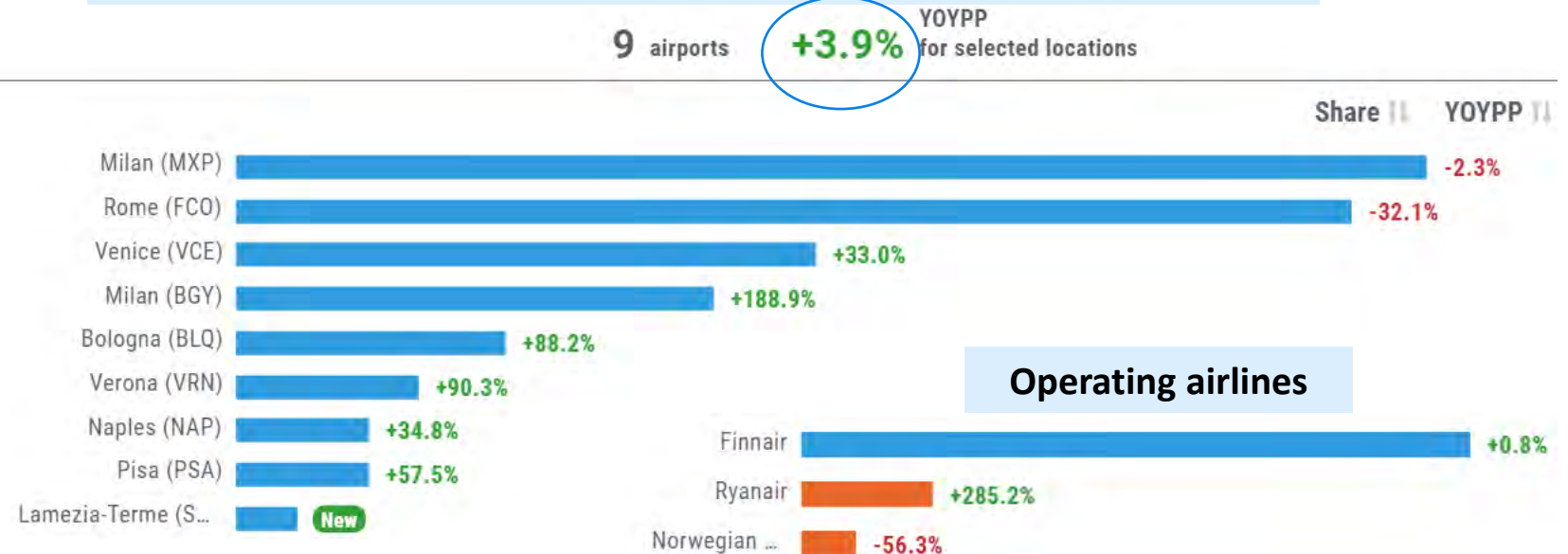
Comparison with pre-pandemic

Main origins of Jun-Aug 2022 air arrivals from Italy



Please note! Bookings for Ryanair are not included

Jun-Aug 2022 air capacity from Italy



Operating airlines

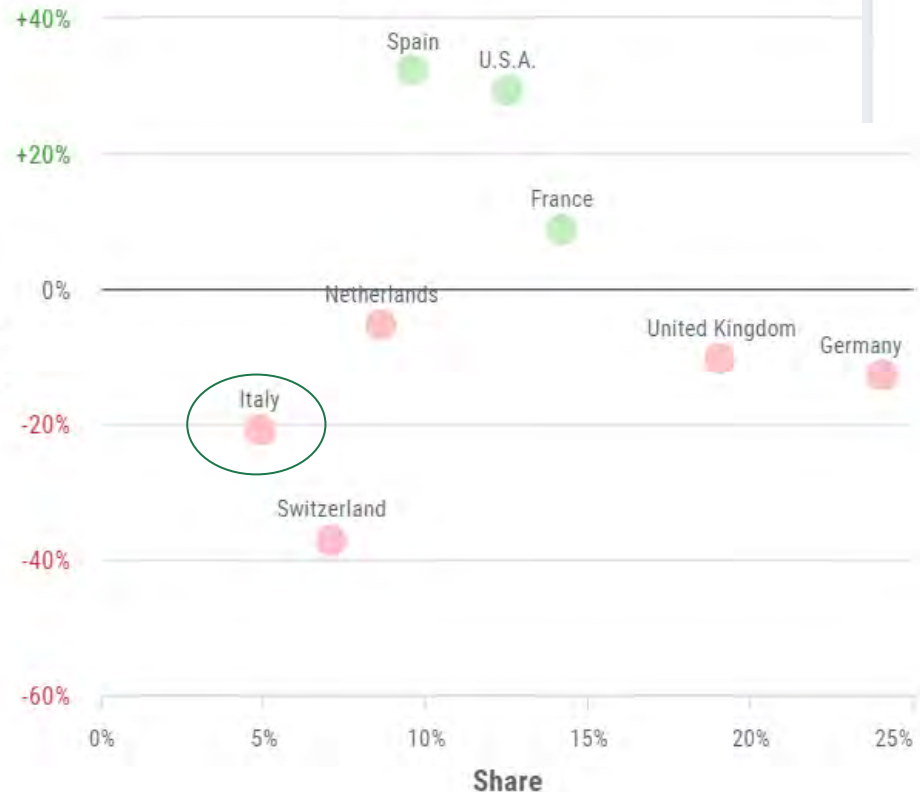


Air bookings for November 2022-March 2023

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

Italian arrivals / bookings vs. pre-pandemic



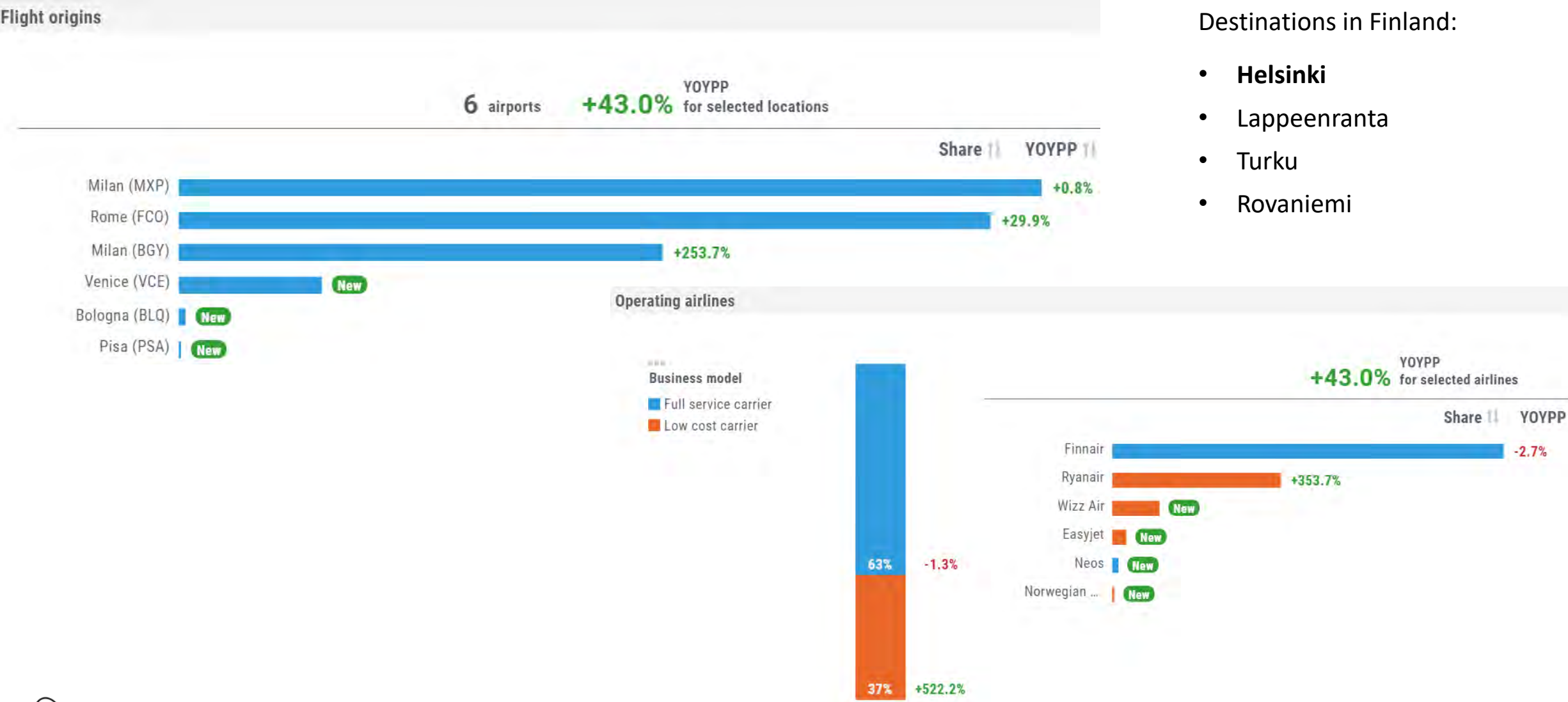
Bookings from Italy / November 2022 - March 2023

	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
Finland	1 092	1 415	528	219	129
Norway	544	878	210	141	109
Sweden	434	763	87	39	32

	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
Finland	-29 %	-10 %	-17 %	-41 %	-15 %
Norway	-37 %	-3 %	-46 %	-65 %	21 %
Sweden	-36 %	-19 %	-24 %	-56 %	33 %

Seat capacity Nov/2022 – Mar/2023

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



Destinations in Finland:

- **Helsinki**
- Lappeenranta
- Turku
- Rovaniemi



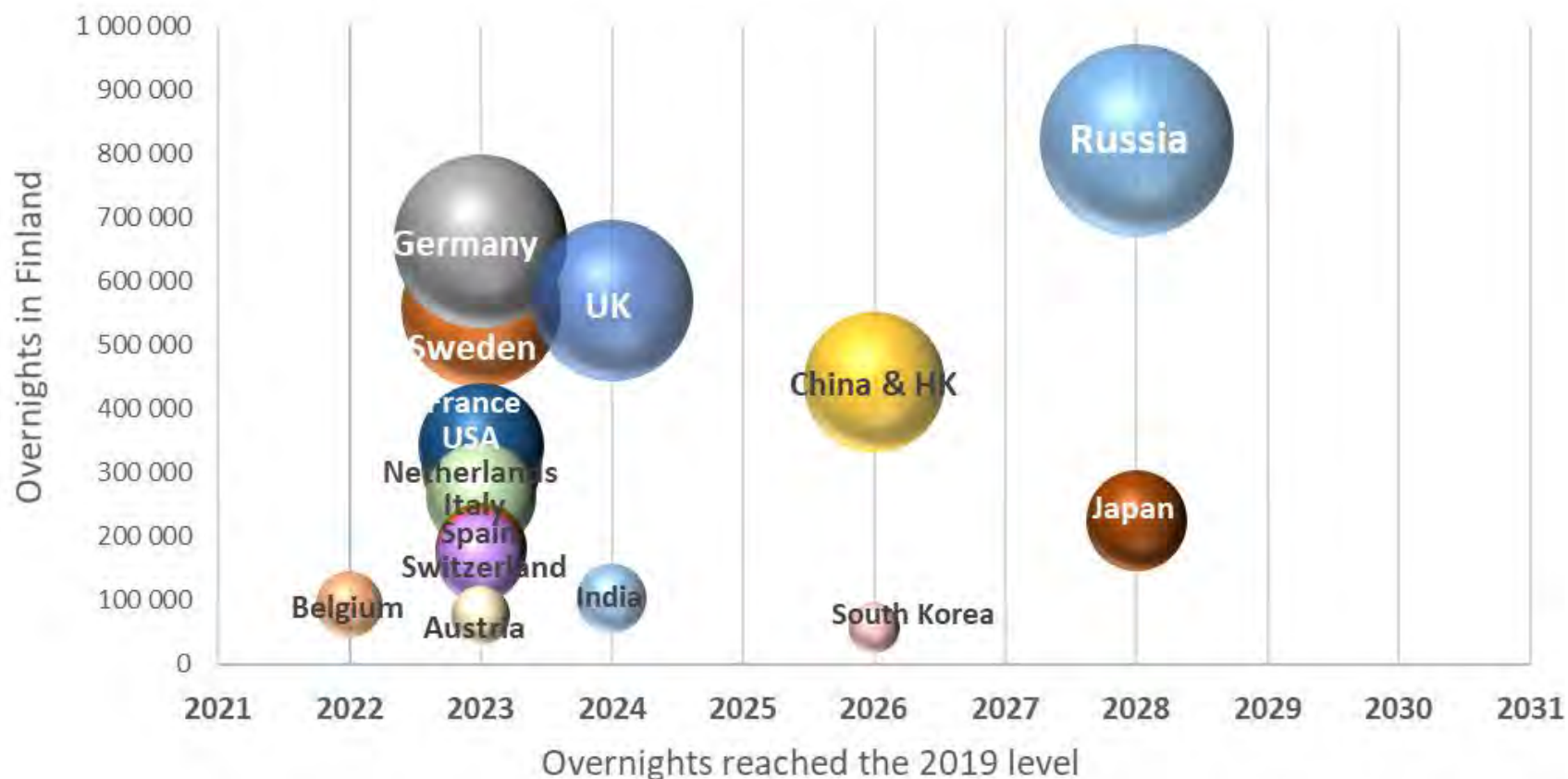
Oxford Economics – Overnights & Spending

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

Why Italy?

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

- Italians are a traveling people a lot and there is a lot of travel, especially from the prosperous north of Italy.
- There is a lot of potential especially in summer tourism, as the longest holidays in the summer and the summer holidays of Italians are mainly long.
- For many years in a row, Italy has seen growth.
- Increased air connections from Italy and thus improved accessibility.
- The Nordic countries are a trendy destination for Italians.

Finland selling points in Italy

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

- Italians are looking for nature, silence, clean air and accessible landscapes in Finland.
- The strengths of winter are: The Snowy Winter Kingdom, the Northern Lights, Lapland, Santa Claus and Rovaniemi.
- In the summer, interest is focused on: City Breaks, Helsinki as part of Scandinavian/Baltic capitals tours, cruises, Fly&Drive tours, outdoor activities (most popularly cycling and hiking), cottage holidays, wildlife spotting and Finnish Lapland combined with the Nordkapp. Big interest for the lakes ; explaining the difference between “Italian and Finnish lakes”
- Italians appreciate sustainability, nature-oriented adventure experiences, energetic city break offerings, Finnish design and architecture, and food culture as part of their trip. Authentic experiences and exoticism are interesting, but combined with high-quality accommodation and service

Activities Italy 2023

B2B sales events Italy

Nordic Workshop Milan –MAY 22



B2B sales events Italy

TTG Rimini with Nordic partners—Next OCT 23



PR Italy

Current media environment in Italy

- Recovery after the pandemic has started and we have resumed a normal level of activities, including bringing media to Finland. This will help us in achieving our targets, as prominence and thus the overall visibility for Finnish travel is always higher in stories that are the result of media trips.
- The war in Ukraine did not have a significant impact on our PR efforts to attract travelers to Finland. To date, there hasn't been news that would indicate that travelling to Finland would not be safe.
- The current economic situation and the prognosis towards the end of the year are affecting the travel expenditure globally. Factors such as fuel and food prices, inflation, electricity, as well as chaotic international airports are reducing the pace of recovery.

PR & Media activities and results in Italy in 2022

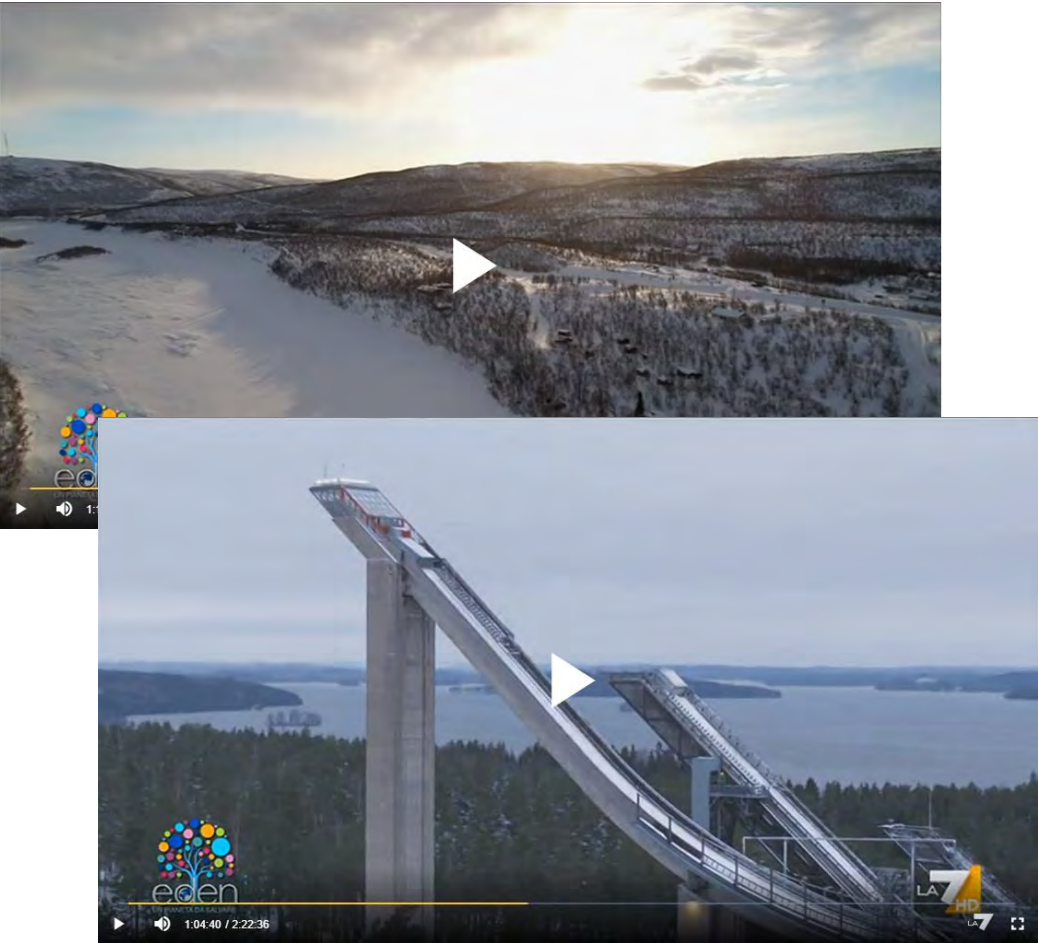
From January to August

- We have resumed our normal level of PR activities: press releases, pitches, media trips (group, individual and influencer), TV productions.
- We have hosted so far 1 group press trip, 1 individual press trip and 2 TV productions.
- January-August in total **92** hits (most for Finland in general 64, Lapland 15, Lakeland 12, Helsinki 1)
- 23 hits were in Top Tier 1 media with brand building effect 135 milj.
- Average tone 3.00, average visibility score 64 %
- Main themes: **culture and wellness**
- Season: Summer 44, Winter 18, Autumn 8, Spring 3, No specific season 23
- Overall satisfaction of all media trips: **4.7/5**

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



Examples of coverage



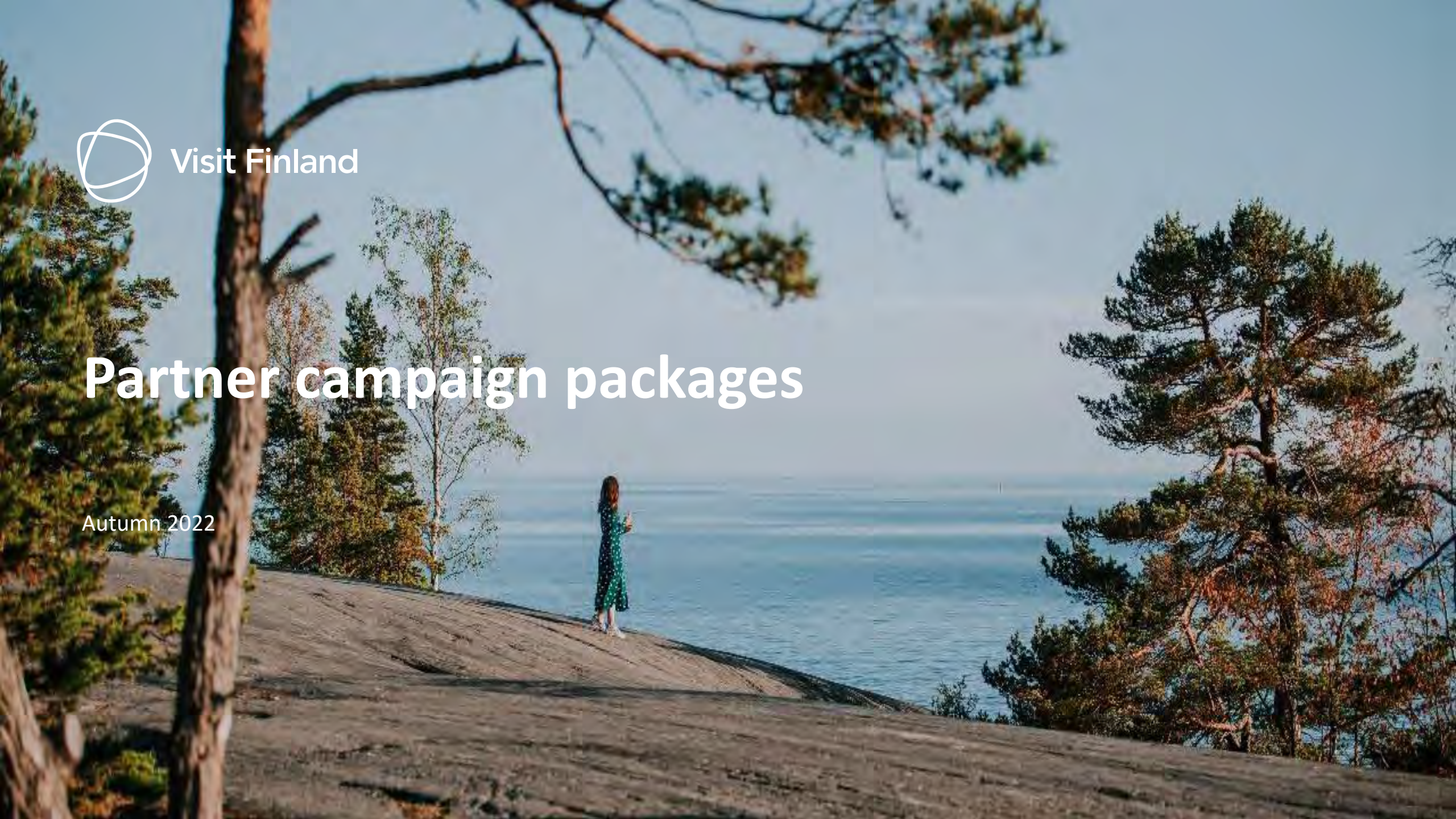
¡Muchas gracias!





Partner campaign packages

Autumn 2022



Mediterranean: Find yourself in refreshing Finnish summer

https://www.lyyti.fi/reg/VF_kampanjapaketit_2023_5843

Campaign details

Timing

March-May targeting summer and autumn

Audience

Target audience

Preliminary segment: Comfort seekers Secondary: Nature explorers, Authentic lifestyle seekers

Target markets

Spain, Italy, France

Vision & objectives

Campaign objectives

To improve brand awareness (brand refresh) in Mediterranean countries, increase interest and consideration of Finland as a travel destination for the summer and autumn. More tactical: enable travellers to choose amongst destinations and kickoff their planning and booking process.

Distribution & KPI's

Activation

Landing page on VisitFinland.com website, banners, social media posts
- to be further defined in the campaign activation plan.

Campaign KPI's

Awareness: reach, impressions, video views.
Consideration: link clicks, sessions.
Conversions: outbound clicks.

Main themes

Refreshing Finnish climate. Specific themes to be ideated as a part of the creative process.

Tone of voice

Authentic, genuine, emotional

Areas of Finland to be covered

TBC

VF campaign partners

Min. 3, max 8 partners. Minimum investment per partner 10 000 €.

Main competitors for summer and autumn seasons

Other Nordic countries

