



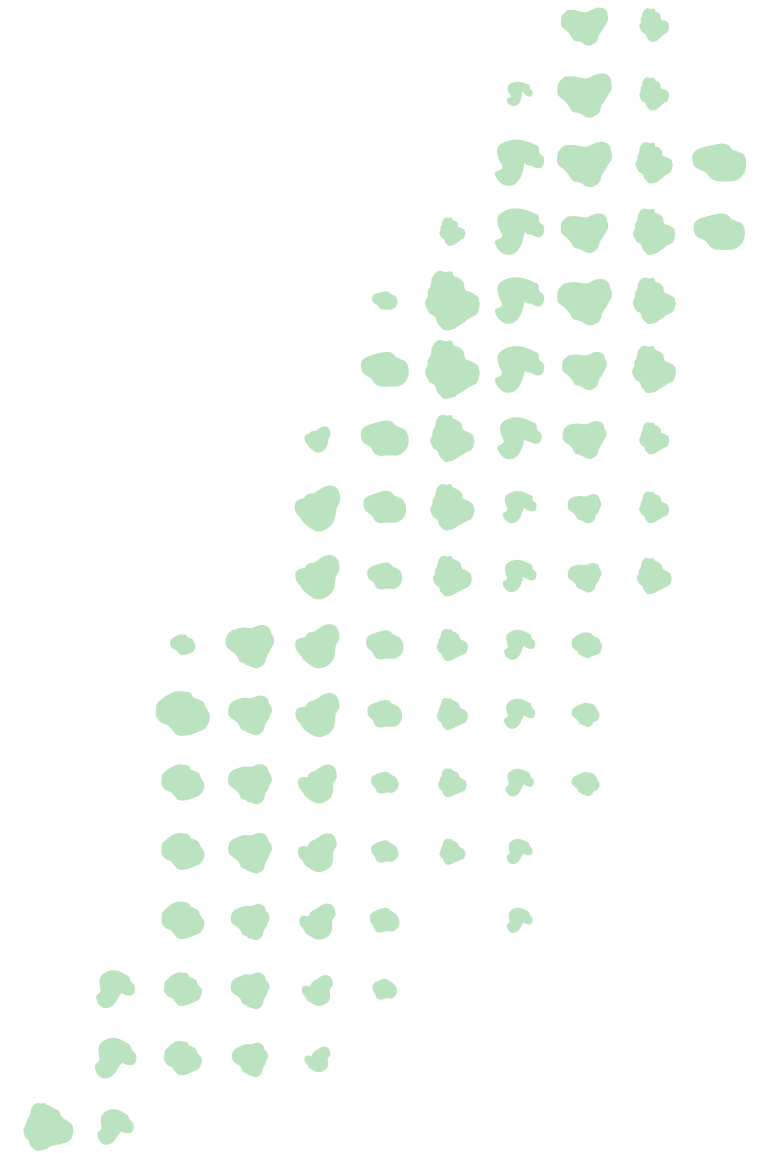
Visit Finland Market Outlook

FRANCE

Tuononen Sanna 08/06/2022

Agenda

1. Why this market - trends
2. Facts and Figures
3. Visit Finland activities on the market

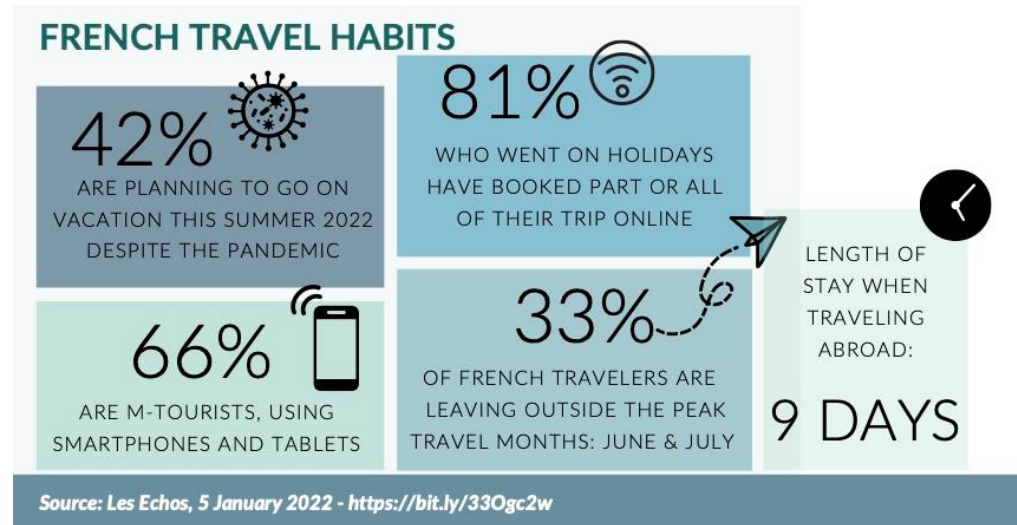


Why this market – trends

FRANCE

- Big market with lots of potential, all-year around
 - French spend money during their holidays and invest into quality services
 - Big and growing interest in Finland and Nordics (culture, design, food, local lifestyle etc.)
 - Green and sustainable values growing fast – search for nature destinations and room to roam
 - Search for clean air and nature & Outdoor activities
- Strong willingness and need to travel
- New connections and better accessibility (Finnair, Air France, Norwegian, Ryanair)
- Trends
 - Shorter booking windows
 - Flexibility
 - Slow tourism & Sustainable tourism
 - Live/Do like a local experiences
 - Wellbeing during holidays
- Finland's competitive advantage
 - Strong Winter image and good offering
 - Easy access & Good country image

Market information : [Ranskan markkinakatsaus](#)





Visit Finland

Facts and figures - France

Digital Demand internet searches
Forward Keys flight data
Overnight Statistics

FRANCE – summary of the latest market insights

- France has been **growing very fast in terms of travel related internet searches in Finland**, being among the top10 source markets in 2021 and in Q1 2022. **Northern lights, Sauna and cities** are the most searched themes. French search for **skiing, cottages, lakes and islands** as well, and they are also very active in searching for **general information** about travel to Finland and especially about **things to do**, so it seems they like to be active and close to nature during their holidays.
- **Flight arrivals** from France to Finland **exceeded the pre-pandemic levels during November and December**, but bookings for the summer remain still on a little lower level than in 2019, except for July when the bookings are slightly above the 2019 level at the moment. Overall, Sweden and Norway have bigger volumes in summer bookings, and Norway is close to 2019 booking levels both in June and July.
- **The total capacity from France to Finland has increased by 4%** compared to summer 2019, with **Air France and Ryanair** as new airlines between France and Finland. Flight connections from **Paris are clearly better than pre-pandemic**. Total capacity from France to Norway is slightly better, while capacity from France to Sweden has decreased by 19% compared to Jun-Sep 2019.
- **Registered overnights** in Finland by the French increased strongly from 2016 onwards. Travel recovery after covid-19 started late-summer 2021 and continued strongly in autumn. During the winter months French overnights reached their new record. **France was the second biggest origin market last winter** and it exceeded the levels of winter 2018-2019 in most of the destinations in Lapland, where nearly 90% of the French overnights took place.

Digital Demand

Digital Demand: Travel related searches in Finland Q1 2022

France the 6th biggest market with 75 600 searches in Q1

Rank	Country	Searches	Growth vs. Q1 2021
1	Germany	167 283	+52%
2	United States	151 590	+41%
3	Japan	122 944	+23%
4	United Kingdom	102 743	+51%
5	Italy	76 999	+25%
6	France	75 588	+53%
7	Spain	56 833	+36%
8	Netherlands	54 827	+92%
9	Estonia	48 181	+26%
10	India	39 253	+20%
11	Switzerland	37 519	+52%
12	Canada	37 513	+49%
13	Sweden	34 369	+26%
14	Austria	26 874	+54%
15	Belgium	23 516	+47%
16	China	19 757	-36%
17	Australia	16 941	+40%
18	South Korea	10 801	+9%

All international searches in Q1 2022:

1 434 400

(growth YoY **49%** compared to Q1 2021)

Top markets by volume:

Germany, USA and Japan

Biggest growth:

Netherlands

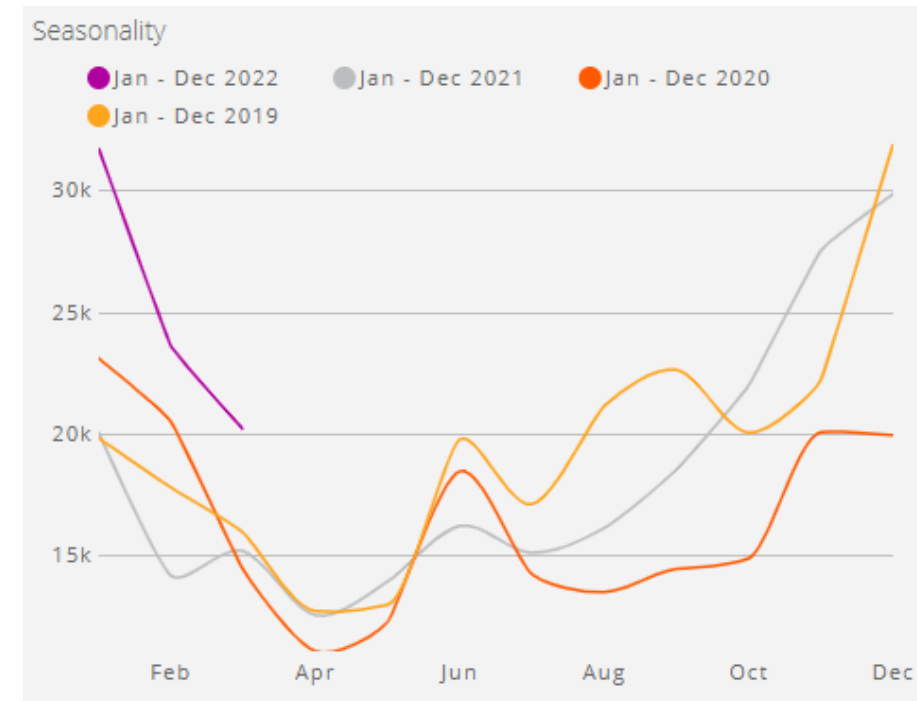
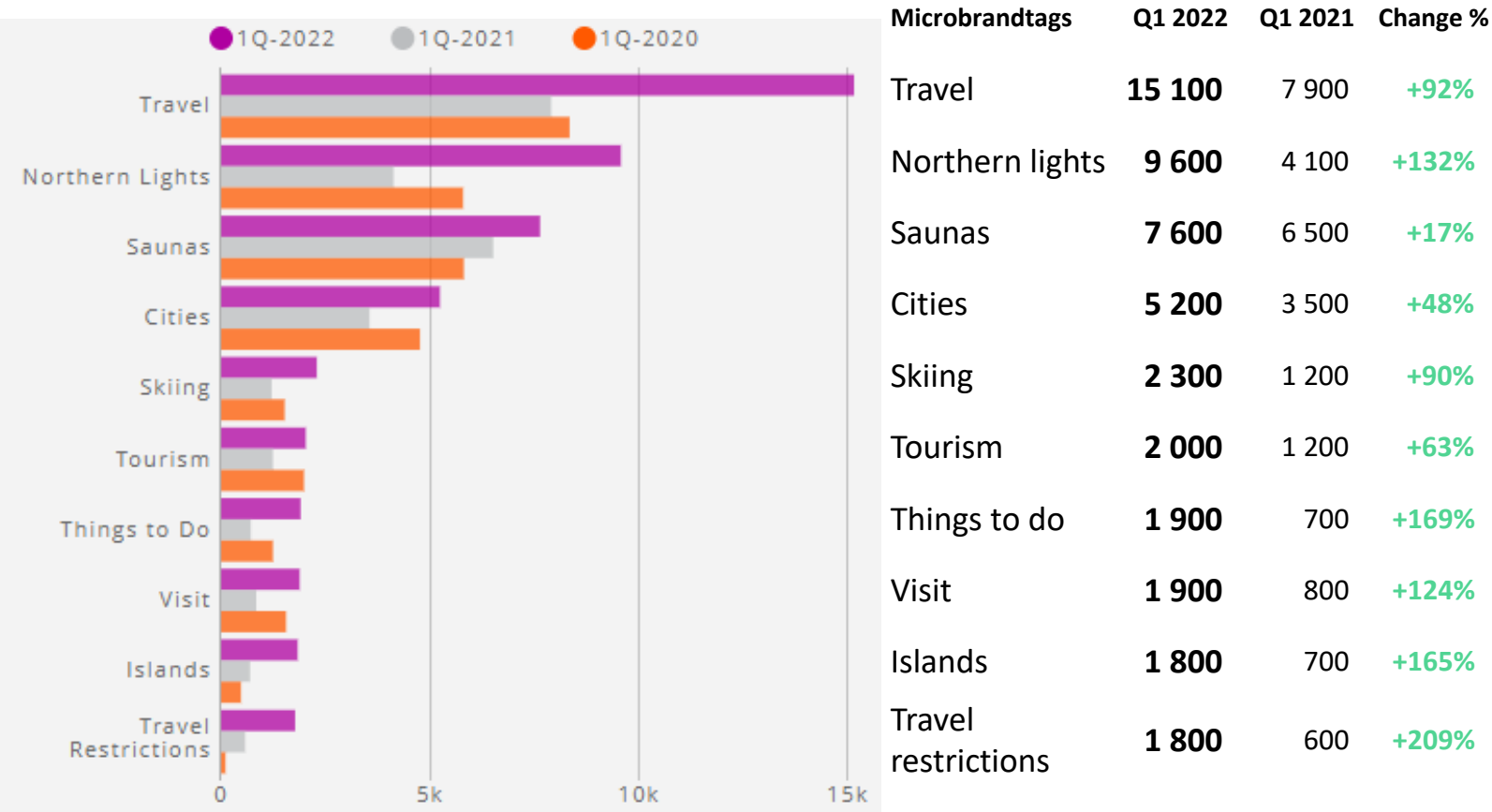
Other markets with over 50% growth:

Austria, **France**, Germany, Switzerland, UK

France: Market specific searches for Finland in Q1 2022

- Searches have significantly increased compared to the previous years of 2019-2021
- France was the biggest market for 'Travel', 'Visit' and 'Islands' searches

Number of searches from France: **75 600** (growth YoY **53%** compared to Q1 2021)



Digital Demand: Travel related searches in Finland 2021

France the 7th biggest market in 2021 with a growth of 12% compared to 2020

Rank	Country	'21 Searches	'20-'21 Growth	'19-'20 Growth
1	Germany	499 041	+5%	+3%
2	Japan	484 472	0%	-12%
3	United States	457 733	+10%	+9%
4	United Kingdom	351 046	+12%	+6%
5	Russia	277 955	-14%	-35%
6	Italy	249 839	+8%	+9%
7	France	221 519	+12%	-16%
8	Spain	194 325	+18%	-12%
9	Netherlands	169 799	+8%	+30%
10	Estonia	169 027	+30%	+24%
11	India	145 189	+12%	+4%
12	Sweden	127 622	+8%	-1%
13	Switzerland	112 178	+4%	-4%
14	Canada	107 616	+11%	+5%
15	China	85 324	-58%	-63%
16	Austria	80 750	+7%	-6%
17	Belgium	71 803	+7%	+5%
18	Australia	54 662	-12%	-9%
19	South Korea	45 618	+2%	+9%

All international searches in 2021:
4 410 900
(growth YoY 8% compared to 2020)

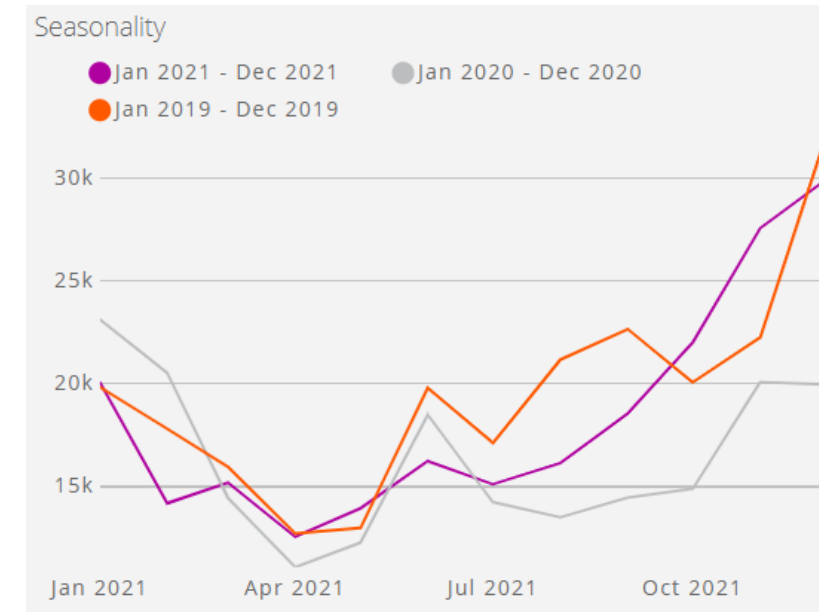
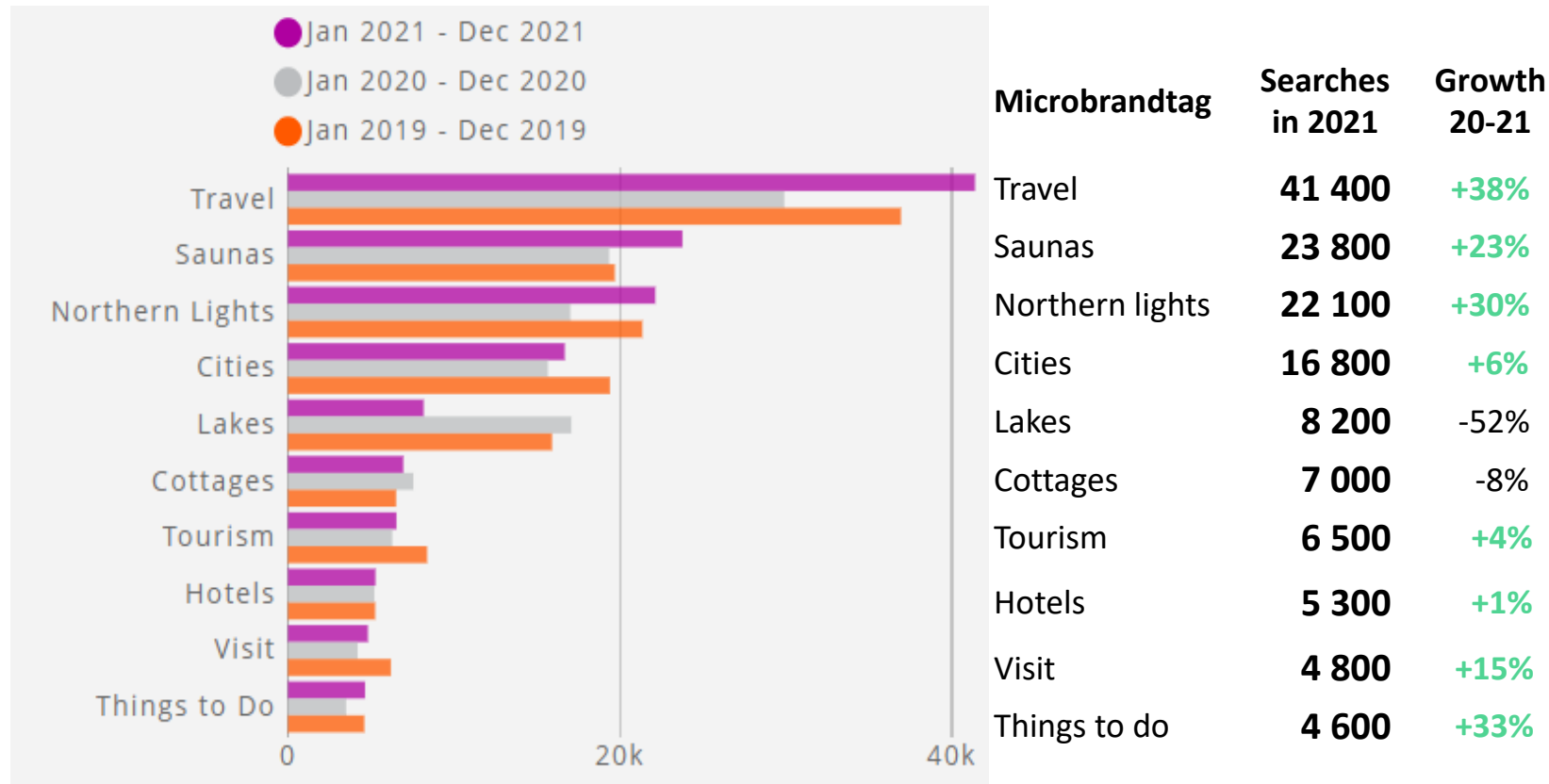
Top markets by volume:
Germany, Japan and USA

Biggest growth:
Netherlands and Estonia

France: Market specific searches for Finland in 2021

France was the biggest market for 'Cottages', second for 'Visit', and third biggest for 'Travel' and for 'Things to do' searches in 2021

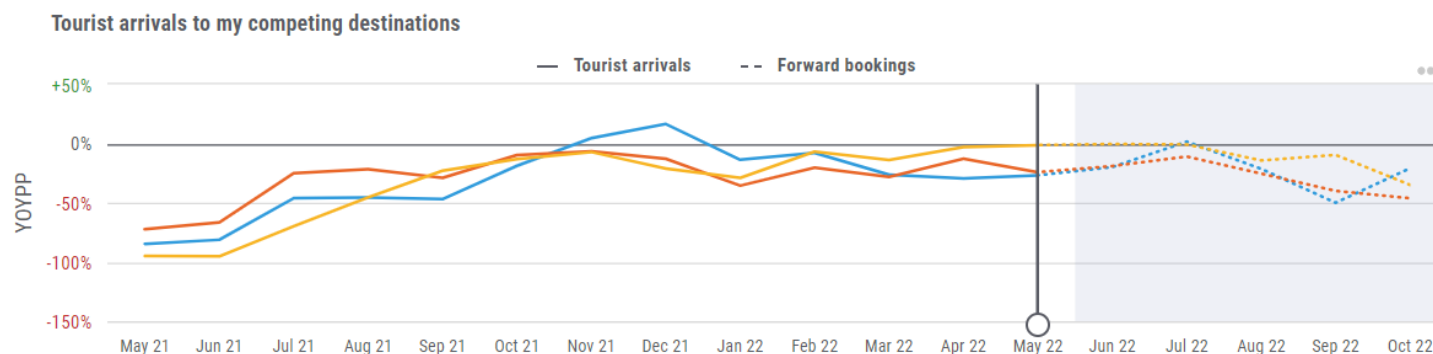
Number of searches from France in 2021: **221 500** (growth YoY **12%** compared to 2020)



ForwardKeys

Bookings from France to Finland, Sweden, Norway

Destination benchmark YOYPP of tourist arrivals



- **Finland** was above the pre-pandemic levels with flight arrivals from France during November-December, and seems to be reaching the 2019 booking level for July as well
- **Sweden** has remained below the 2019 levels both for winter and summer
- **Norway** has been doing better during the spring time, and the bookings for June-July are also at the 2019 levels
- Norway and Sweden have clearly bigger volumes than Finland for June-September

2022	June	July	August	September	October
Finland	2 842	3 384	1 861	236	219
Sweden	6 272	5 597	3 000	394	150
Norway	7 115	6 866	4 871	723	306

2022 vs. 2019

	June	July	August	September	October
Finland	-20%	+2%	-21%	-50%	-21%
Sweden	-19%	-11%	-25%	-40%	-46%
Norway	0%	-1%	-14%	-10%	-35%

EUROPE - Finland

Jun-Sep 2022 capacity **-24%** below 2019 level

From top10 countries	Share	Seat capacity compared to pre-pandemic
Germany	12%	-28%
Sweden	9%	-41%
Spain	7%	-22%
UK	7%	-32%
Greece	7%	+25%
Italy	6%	+11%
France	6%	+4%
Netherlands	5%	+16%
Denmark	5%	-35%
Latvia	4%	+3%

France – Finland Jun-Sep2022 capacity **+4%** above 2019 level

France - Sweden **-19%**

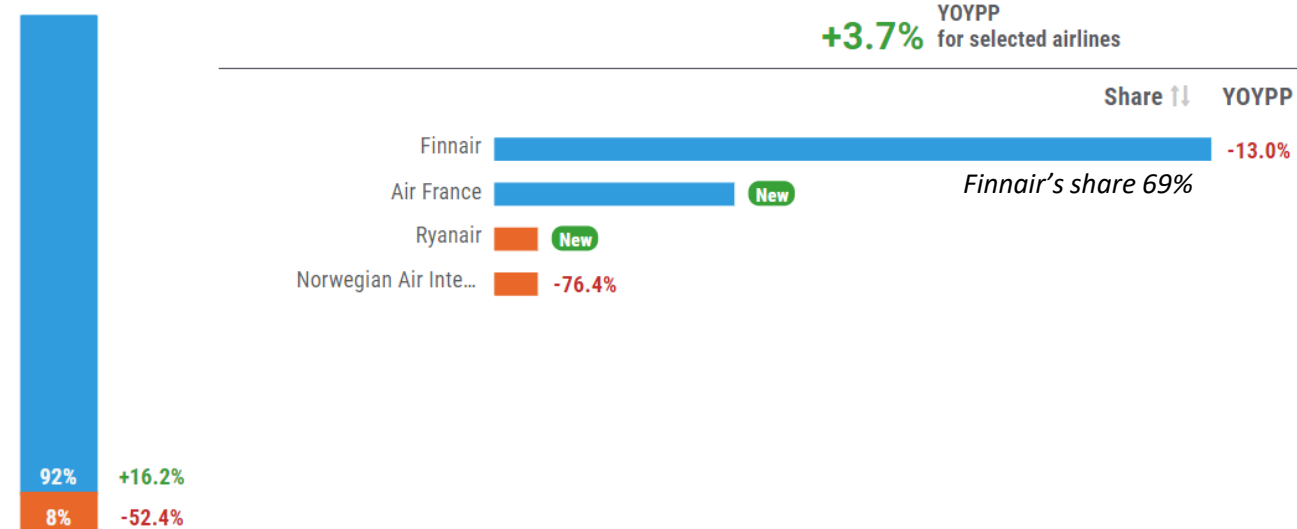
France - Norway **+1%**

Flight origins



Operating airlines

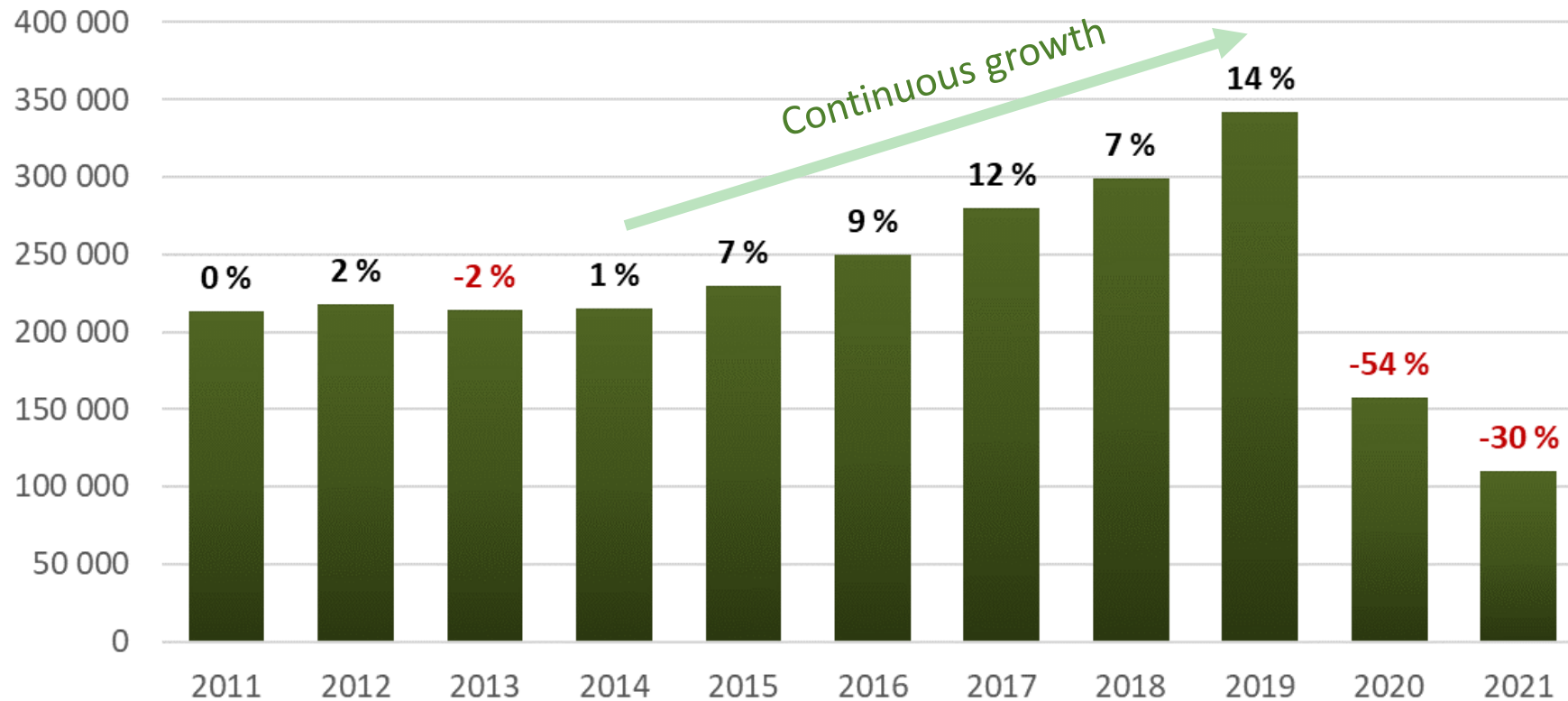
Business model
 Full service carrier
 Low cost carrier



Overnights



France – overnights in Finland 2011-2021



2021

110,000 nights
No. 5 in rankings

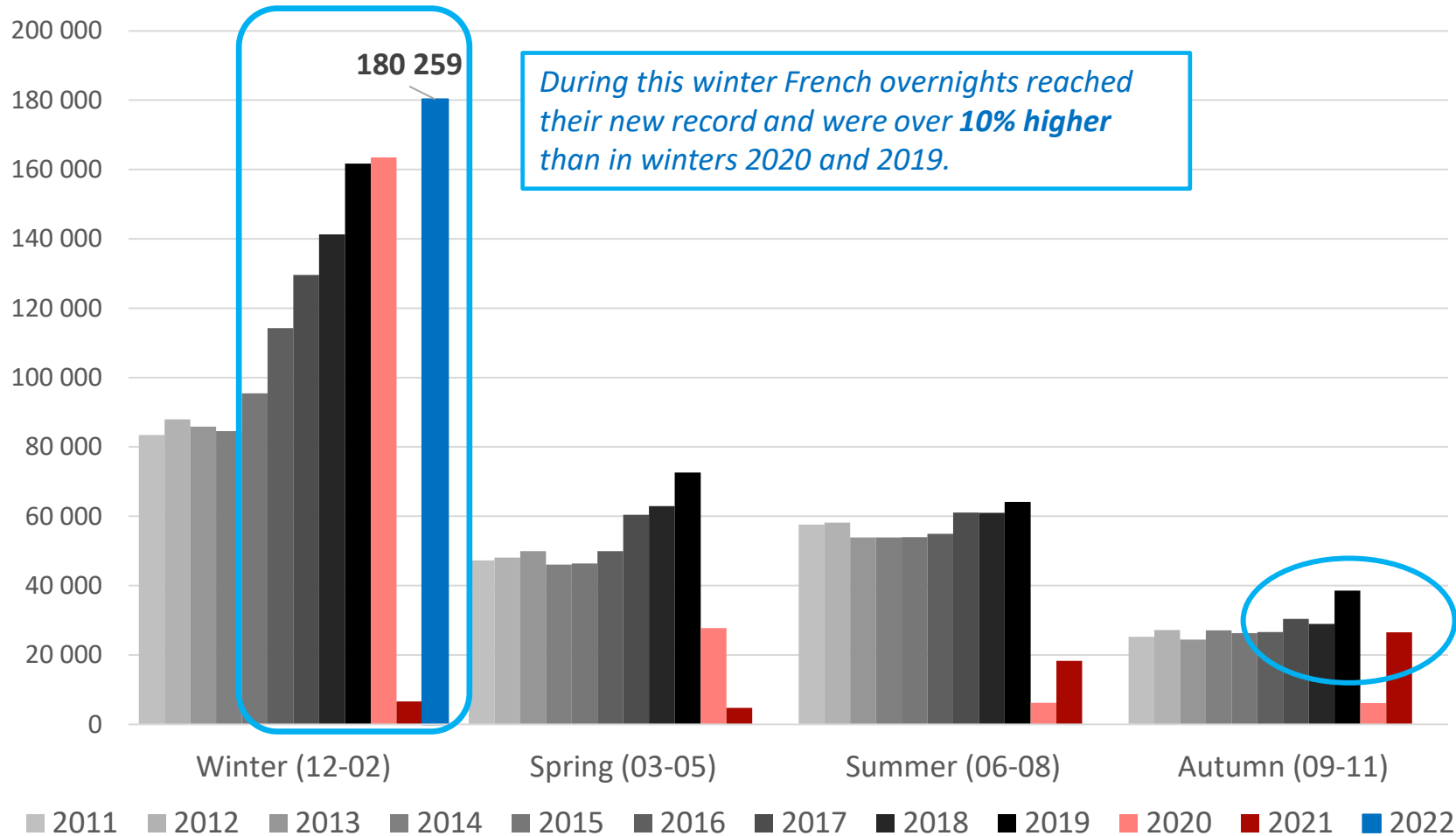
YoY change -30%

2019

173,800 nights
2021 vs. 2019 -68%

Seasonality of French overnights in Finland

French overnights by season 2011-2022



- Before the pandemic, **winter and spring** were **growing**. Specifically winter had a sharp increase from 2016 onwards.
- In 2019, **nearly half** of the French overnights were spent **in winter**, **22% in spring** and **19% in summer**.
- France was **the 3rd biggest** foreign market in winter overnights **in 2019**, while **this winter** it was **the 2nd biggest** after UK, with a **14%** share of winter overnights in Finland.
- **During this winter 2022 (Dec-Feb)** **nearly 90%** of French overnights were spent in **Lapland** (over 157 100), and it was **21% more than in 2019**. Overnights increased compared to winter 2019 in almost all destinations in Lapland (only in Muonio and in Enontekiö the number of overnights stayed behind the 2019 level). **France** was the **biggest source market in Rovaniemi and Muonio**, and the **2nd biggest in Inari, Levi and Ylläs**.

Visit Finland activities on the market - highlights

FRANCE

- Active B2B work
 - Road shows with Tour operator partners (during June-July-September)
 - Joint Promotions (Both summer & winter)
- Campaigns
 - Yonder Summer campaign
 - Tactical Summer campaign with Tour operators
 - Voyage Privé Summer campaign
- Nordic Workshop - May
- Team Finland work and Country branding
- Go Nordic Project
- PURE – Meeting & Events Workshop – September
- PR activities



Visit Finland activities on the market – highlights - PR

FRANCE



Visit Finland activities on the market – highlights - PR

FRANCE

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