













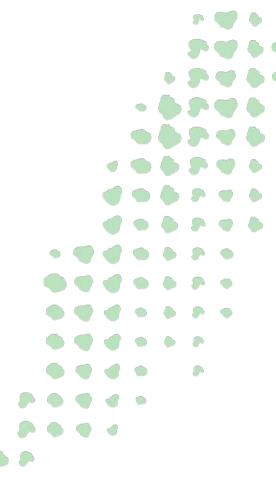
CHINA, INDIA, JAPAN

- 1. Industry Update & Distribution Channels
- Finland's Position in the Market
- 3. Consumer Trends & VF Target Groups
- Increasing Demand & Top Activities

SUPPORTED MARKETS

1. South Korea & UAE

PR UPDATE





Mainland China + HK - David Wu





Visit Finland China Team









David Wu Director

Lisa Li Trade Manager

Qianwen Zhu Marketing Specialist Social Media



Industry Update & Distribution Chan



- Traditional players are struggling with the business model.
- Loss of travel trade talents is a big issue.
- Domestic travel is the focus (holiday package, educational travel/camps, RV/glamping products, self-driving, outdoor/sports travel) for most companies.
- OTAs are dominating the market and reforming to be better, with the advantage of funds, tech & traffic.
- Business travels are on the rise from China to Europe.
- MICE segment has a huge demand for outbound.
- The importance of Incoming Tour Operators is not changed for the time being, but lack of service providers/capacity might be an issue in the beginning period of recovery.



Finland's Position in China+HK



- Finland is known as the happiest country, a Nordic country, a country with good education system, the hometown of Santa Claus, and a destination for aurora hunting.
- Finland is still considered as a niche destination (volumn wise).
- There are reasons to believe that people from this market would be more interested in exotic destination to look for once-in-a-lifetime experience, which Finland could offer.
- Even with the current situation, we have the best flight connection among all Nordic countries.
- Finnish education has its reputation in China among parents, which could bring big growth to the destinations from educational travel segment. (the biggest growing segment in 2019-2020 was educational travel from China including HK to Finland)



Consumer Trends & VF Target Group



- Even higher reliance on social media channels (Tik Tok, The Red Book, WeChat Channels) from dreaming/seeding, forming the purchasing decision and even the purchasing
- Short video as the main content for consumption
- Digitalization
- Last minute booking
- Shorter trip VS. longer stay
- Key words: outdoor/sports/nature/health/lifestyle/sustainable/escaping
- More and more family travel and educational travel
- Certain events like a sports competition/music show/festival would be key motivation for traveling.



Top 3 traveller segments in China

NATURAL WONDER HUNTERS





Interested in: Northern Lights, National Parks

Target groups: Families, Couples, Young Travellers, Group of friends, Seniors

Main product type: High-end and Luxury experiences, Touring, Nature Experiences

Traveling season: Winter

Main channels to reach this segment: Social Media, Travel Trade





Top 3 traveller segments in China

AUTHENTIC LIFESTYLE SEEKERS

Main product type: Culture&Lifestyle, Wellbeing and Sauna, Outdoor&Sports, Cottages&Resorts

Interested in: Cultural destinations, Being in nature, Unique accommodations

Target groups: Families, Couples, Young Travellers, Group of friends, Seniors

Traveling season: Summer & Winter

Main channels to reach this segment: Social Media, Travel Trade





Top 3 traveller segments in China



Main product type: Education, Outdoors&Sports



Interested in: Real classroom experience, Finnish education, Summer/Winter capms, Outdoor/Sports camps

Target groups: Parents of K12 kinds

Traveling season: Academic holidays (summer holiday, winter/CNY holiday)

Main channels to reach this segment: Schools, Social Media



Status of Flight Recovery

Finnair

Shanghai-Helsinki, 2 weekly, Wednesday & Saturday HK-Helsinki, 5 weekly (from Dec. 3)

JuneYao Airlines

Shanghai-Helsinki, 1 weekly, Saturday

Sichuan Airlines

Chengdu-Helsinki, 1 weekly, Thursday





Increasing Demand

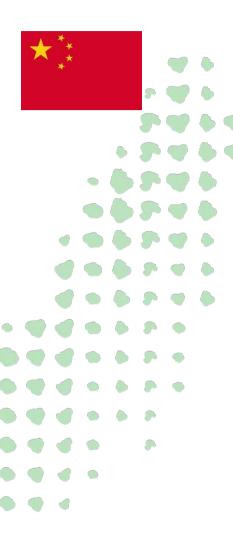
KEY MARKET SPECIFIC OPPORTUNITES

- The Wealthy class are eager to travel abroad and willing to spend for unique experience
- Finland has natural attractiveness for Chinese travelers, who seek for once-in-a-lifetime experience
- Huge senior population with money and time
- Finnish education has its reputation in China among parents, which could bring big growth to the destinations from educational travel segment.
- Chinese airlines are seeking for resuming international flight connections and development
- To influence the influencers

CHALLENGES

- COVID Measures and Policies by Chinese government
- Limited flight capacity between China and Finland
- Finnish visa policy
- Geopolitics





Top Activities

- MATKA + Pre-fam for HK tour operators
- Visit Finland China Roadshow (once it is possible)
- FAM Trips
- VF Edu Travel workshops
- Nordic Campaign
- Social Media Promotion





India – Sara Kaur Sodhi





Industry Update & Distribution Chan



- •Travel continues to rebound in India fueled by positive consumer sentiment and growing middle class. (Indian middle class is expected to reach 330 million in 2023 from 166 million in 2018)
- •Since India resumed regular International flights in March 2022, the impact of the pandemic on travel decisions was negligible given the extremely high pent-up demand. There has been an unprecedented uptick in outbound travel demand from India to many parts of the world this summer.
- •Indians are facing long visa delays for US, UK, Europe.(A variety of factors like shortage of embassy staff due to the COVID-19 pandemic; a huge backlog of applications; a massive increase in demand for tourist visas, and stricter protocols regarding granting visas has led to the same)
- •As per ICRA the international growth has reached 72 per cent of pre-COVID levels already and domestic leisure traffic in India has recovered more than 100 percent of pre-pandemic levels.
- •Customization/ bespoke/ tailormade is a trend that can be seen gaining popularity in the post pandemic travel. Affluent Indian travellers are looking for deeper and more comprehensive relationships with their travel advisors.
- •India's digital revolution has also led to an ever-growing internet and ecommerce penetration (Over the last decade, internet penetration has increased from 11 percent in 2012 to 47 percent in 2022 and e-commerce users have increased over 19 times from 10 million users in 2012 to 190 million in 2022. The recent launch of the 5G services in the country, would further accelerate this trend with high-speed internet enabling higher e-commerce adoption)



Finland's Position in India



- With 27 % growth in 2019 vs 2018, India was the number one & the fastest growing markets of Visit Finland's target markets.
- In 2022 the tourism recovery from India has started, but it has been slow to Finland due to the ongoing visa concerns.
- Finnair launched scheduled flights to Mumbai from August. After Delhi, Mumbai is a major airline hub in India and is home to leading global businesses.
- Gini coefficient for India in 2019 was the best among the target markets, which means that the Indian overnights in Finland are the most evenly distributed throughout the year.
- Finland is a new luxury destination for Indians. Finland is well known among Indians as "the happiest country in the world", and tourists consider Finland as a high-end/luxury destination.
- Finland is best combined with winter pleasures, snow activities and bucket list experiences. The Northern Lights, Christmas celebrations, Santa Claus and special accommodations such as glass huts are of interest to Indians, as is the clean nature of Finland. For winter travel mono travel packages for Finland are on rise (both GIT &FIT)
- For summer Helsinki Region & Lakeland are gaining popularity with Indians too. For summer season the top selling product in India is a combination of all the Nordic capitals.



Consumer Trends & VF Target Group

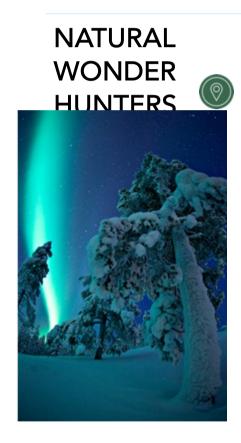


After two tough years, the travel sentiment amongst Indian travellers is upbeat where spending time with loved ones is a top priority. With the resumption of all regular international flights India has seen a great surge in travel bookings.

- •Bleisure Mixing Business with Leisure Travelling
- •Opting for Staycaytions or Homestays- With the frequency of domestic trips on the rise, staycations are one of the most popular travel trends right now. Open places like villas and homestays are preferred choice for the same.
- •Embracing Technology for travelling- Mobile devices account for two out of every five internet bookings, according to operators. These smartphone customers are also more beneficial to your company.
- •Discovering New places and Hidden gems Another significant change in travel behaviour over this time period has been an increase in interest in discovering and exploring some of the country's hidden jewels and undiscovered locations.
- Supporting Local Businesses- The desire to engage meaningfully with the surrounding community will extend to getaways in 2023, as we strive to be more conscious of each trip we take and ensure a good influence on the locations we visit and the people who live there.



Top 3 traveller segments in India



Main product type: High-end and Luxury experiences, Culture&Lifestyle

Interested in: Northern Lights, Midnight Sun, National Parks, Forrest&Lakes

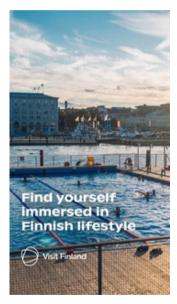
Target groups: Families, Couples, Young Travellers, Group of friends, Honeymooners

Traveling season: Summer, Autumn, Winter



Top 3 traveller segments in India

AUTHENTIC LIFESTYLE SEEKERS



Main product type: Nature experiences, Family Experiences, Culture&Lifestyle, Food, Wellbeing and Sauna

Interested in: Cultural destinations, Sauna, Design Districts, Food Culture, Unique accommodations

Target groups: Families, Couples, Young Travellers, Group of friends, Honeymooners, Seniors

Traveling season: Throughout the year



Top 3 traveller segments in India

CITY **BREAKERS**







Main product type: Culture&Lifestyle, Family Experiences, Education&Technical, Citybreak

Interested in: City sights, Urbal Culture, Museums & Design Districts, Food Culture, Shopping

Target groups: Families, Couples, Young Travellers, Group of Friends, Honeymooners, Seniors, Solo Travellers

Traveling season: Throughout the year



Status of Flight Recovery

Finnair

Helsinki – Delhi, Daily Flights

Helsinki – Mumbai, 3 times a week

Lufthansa, KLM, Air France

Code Share between Finnair and Qatar Airways:

7 weekly flights to and from Helsinki

7 weekly flights to and from Stockholm

7 weekly flights to and from Copenhagen





Increasing Demand

KEY MARKET SPECIFIC OPPORTUNITES

- Continous engagement with travel trade and trade associations in India
- Strengthening our co-operation with luxury consortiums like Serendepians to strengthen Finland's position as a preferred destination with HSFIT's for luxury and experiential travel
- Regular connects with Corporates and MICE Agents to showcase Finland and create recall for Finland as a Safe MICE and Congress destination
- Trainings / Webinars / Sales Blitz
- Developing MONO Destination products for Finland in India
- Maximize enrollment for Finland Travel Pro
- Effective communication through India market specific newsletters
- Capitalise on the new Mumbai route & Finnair code share with Qatar Airways
- Strategic PR Activations





Top Activities

- MATKA 2023 + Fam
- OTM 2023
- Visit Finland India Roadshow (3 Cities)
- MILT 2023 (MICE India Luxury Congress)
- Fam Trips Luxury, Education & MICE
- Trainings / Webinars / Sales Blitz
- Marketing Campaigns (B2B2C)
- PR Campaigns Media, Influencers, Celebrities





Japan – Koichi Numata





Industry Update & Distribution Chan



- The monthly number of outbound traffic has reached 300,000 in August and September.
- An overall outbound business remains around -82% compared to 2019 for the industry.
- An overall outbound business remains around -82% compared to 2019 for the industry
- Overnights for Finland has been performing relatively well at the industry average
- Emerging interests towards Finland by the tourism industry
- FIT and corporate markets driving bookings for both short and long-haul destinations
- OTAs are increasing the market share
- Traditional distribution channels are struggling with the sales of package tours and series groups
- High-end senior markets and group tours for special Interests have strong motivation to travel overseas with tour escorts.
- Leading travel agents have been supporting the government's "Nationwide travel discount" programs for the domestic business in Q4.



Finland's Position



- Finland's visibility continues to be high on themes such as lifestyle, sauna culture and social values such as gender
 equality and sustainability.
- Prime Minister Sanna Marin visited Japan in May, there were huge coverage especially on the gender equality and social welfare.
- Lifestyle, designs, moomin and sauna are popular articles covered by fashion magazines and web media. Finland touch
 points are spreading. Finnish culture and lifestyle are used in helping local tourism destinations revitalize economy.
 Sauna and Mölkky continue to attract various age groups including university students across Japan. Finland is one of
 the few destinations which are successful in reaching out to young segments.
- Finnish touch points continue to play a significant role. Marimekko retail shops, Moomin Valley Park, iittala Cafe, Aarto Cafe and Hyvää Matka are popular stops. There are growing number of Finnish sauna themed venues. Visit Finland has organized and participated in many consumer events throughout the year. Finnish contents are very popular in helping attract participants to consumer events.
- Finland has positioned well against the competing destinations such as Nordic countries, Canada and New Zealand, to some extents, Hawaii and Australia for honeymooners, students and families.



Consumer Trends & VF Target Group



- Borders are now open, all the travel restrictions lifted in September
- Pent-up demands are definitely there. Consumers are anxious to go overseas.
- Possibility to catch Covid-19 is still a big concern among many.
- The Japanese government has launched a major promotion so called "Nationwide travel discount" intended to stimulate the domestic trips in Q4. This campaign had some impact on the decision making for the planning to travel overseas.
- Travel demands are more diversified especially among the young travelers especially for those who are highly motivated to go abroad.
- FIT market and corporate travel are driving the bookings.
- Japanese are looking for nature experiences, northern lights, midnight sun, forest & lakes, outdoor activities, culture & lifestyle (Museum/Design), food/Cafe, sauna, mölkky, moomin, santa and shopping.
- SDGs and connecting with nature are emerging needs.
- People are looking for more authentic local experiences and inspiration during the visit.



Top 3 traveller segments in Japan

AUTHENTIC LIFESTYLE SEEKERS



Main product type: Nature experiences, Culture&Lifestyle, Food/Cafe, Wellbeing, Sauna and Mölkky

Interested in: Cultural destinations, Sauna, Design Districts, Food Culture, Unique accommodations, Everyman's right and Summer house

Target groups: Families, Couples, Young Travellers, Working Holiday visa holders, Honeymooners, Seniors

Traveling season: Throughout the year

Main channels to reach this segment: Travel Agents, Tour Operators, OTAs and direct Finnair booking



Top 3 traveller segments in Japan



Main product type: High-end/Luxury experiences, Culture&Lifestyle and Outdoor&Sauna such as golfing, hiking, fishing and skiing

Interested in: Northern Lights, Midnight Sun, National Parks, Forrest&Lakes and outdoor activities

Target groups: Senior, Enterpreneurs, Young Travellers/Working Holiday makers, Group of friends,

Traveling season: Summer, Autumn, Winter



Top 3 traveller segments in Japan

CITY BREAKERS





Main product type: Food/Cafe hopping, Culture&Lifestyle (Museum/Design), Sauna, Cycling and Shopping

Interested in: Shopping, Cafe hopping, Museum/Design hopping, Public sauna hopping, cycling and Sightseeing

Target groups: Family, Seniors, Honeymooners, Working Holiday makers, Corporate travellers/Visit Friends and Relatives, Students

Traveling season: Throughout the year

Main channels to reach this segment: Travel Agents, Tour Operators, OTAs and Finnair direct booking



Status of Flight Recovery

Finnair

- Launched the game changing Haneda/Helsinki route, daily 30th October
- Keeping 2 weekly flights to/from Narita

Japan Airlines

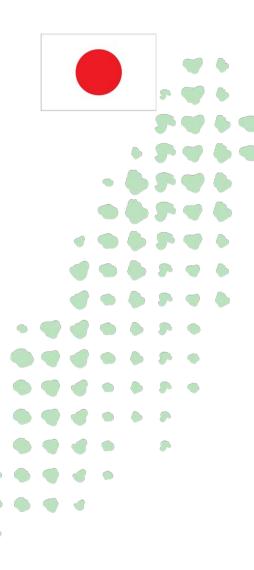
• 4 weekly flights to/from Haneda





Increasing Demand

- Finnair's new Helsinki/Haneda route opens up new markets.
- Mono destinations, new products, longer overnights
- Booking curve is picking up for both FIT and Groups featuring northern lights and Christmas.
- The core USP for Finland outperforming other winter destinations such as Canada.
- Much anticipated Working Holiday Visa agreement has been finally reached in 2022.
- Student group business
- The market is maturing for "sauna plus" activities capitalizing on the sauna trend, combining it to the hobbies like golfing, fishing, skiing and cycling products





Top Activities

B2B – OFFLINE EVENTS

Moi Finland in May 2023

Celebration of Finnair 100yrs and VF 50 yrs –

MATKA 2023 (not from this budget)

2 Fams: one in Ruska, one under "ETC Japan Chapter" joint initiative scheme with the member countries

Joint fam with Finnair mega fam in June as part of ongoing promotion of the new Haneda route

2-3 joint promotions with selected partners - in result of JATA delegation visit

Toursim Expo in October with ETC in Osaka





Top Activities

B2C

Toursim Expo in October with ETC in Osaka

Finish Lifestyle events featuring sauna, mölkky, food and Finnish touch points

Kawasaki Frontale "Finland Land"

Mölkky Japan Cup, Japan Open and Asia Cup

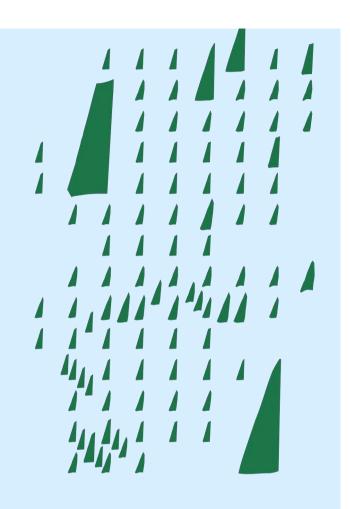
PEACE DAY Japan Foundation around 21.Sep

Team Finland program





Supported Markets South Korea, UAE





South Korea & UAE

TOP ACTIVITES in **South Korea**

TOP ACTIVITES in **UAE**

MATKA Fam – 5 pax Possible "summer" or "autumn" fam

Moi Finland –roadshow 8.-12. May 2023

Seoul 9th May

MATKA Fam- 2 pax UAE + 3 pax Qatar

UAE&Qatar Roadshow 14.-16. Feb 202

Joint activities with Finnair
Joint promos with selected TOs
Misc X-over activities



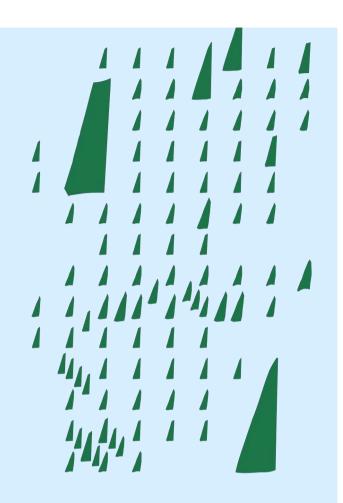






PR highlights / China, Japan, Japan, India 2022

Sari Hey 10.11.2022



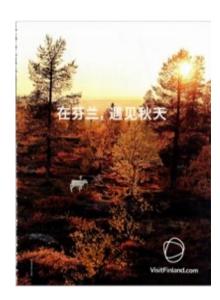


China

- We have continued with a 50% retainer with our local PR agency and focused solely on pitching and press releases
 - 10 press releases Jan-Oct
 - 10 pitches Jan-Oct
- Results Q1-Q3
 - 205 media hits (incl. Weibo and WeChat)
 - over 73% in tier 1 media
 - Outdoors and culture have been the most common themes
 - Summer as a season has been by far the most covered season
 - All greater regions have received visibility, however Lakeland has received the biggest number of hits



China coverage highlights Q1-Q3











芬兰推出全新红叶实时监测系统

每年9-10月,芬兰便会变成黄色。红色和橙 你的海洋,此是通常被称为秋日红叶,或芬 兰语的"鲁什卡(ruska)"。鲁什卡会在现 短几周内以500公里的速度从北部向南部 蔓延,今年,芬兰国家旅游局推出了全新的 秋季红叶菜时边回系统,以使游客们了解秋 叶变化的最新情况。"有了秋季红叶实时地 图。就会知道在何时到访芬兰的何地可以欣 贯到这般地址的秋日色彩。" 芬兰国家商务 促进局国际市场营销和公关高级总监Holi Jimenezikiti.

ALVAR AALTO IN FINLAND



而来天白年包尼。可以其选用各级先生等今均常度的灯。 亦生的层面等。是年的从十月就介始牌图。是我的扩至内 驾政是包全链额化、每年十一月末。条之的产十四级为着省立 将标的等约者。据台图图。 盖型用弧形型等 6 个级 同时比赛在这里展开角度,产于由自然制度也为了解省社会 产于位于形态主的样序展【Kouseno)】交流使用,产于建筑 利赖了美丽的名子长,更是一定兴奋并然的对众走影才们提出 中使哺育并止斜的社区预数。闭上双联充分放松。被去身心的疲惫。 在雪山之磨寻见极致的动脉双重疗愈。 行罪;所目尚名之开,反及一所大块宣称可约小牛用以山内小 镇。度信村四周越野萧雪滋环路,拥有 21 度升降梯、34 个滑 雷城道。南雪城道分多种难度,适合不同水平的游客。多数滑 专结对度都不高、同时也有世界极的比赛用矛臂被诱。度信息 **心热心图的影響地可包含新港區委员会的新斯曼里拉拿拉斯**森

激的感觉。在滑雪同时,杏兰让你身处原生态的大自然之中 山塞水长、灰岭森林密布、白色景彩海旋、海色岛不可少餐员 验到独特的亦兰风情,如探寻别鹿农场、体验芬兰式桑拿浴等



存置收额括中、加拿大的冬季正式开启、何些都有无数滑









VF is credited in the top comment





Japan

- Also in Japan we have continued with a 50% retainer with the exception of a few media trips in H2
- Press releases and pitches
 - 10 press releases Jan-Oct
 - 7 pitches Jan-Oct
- Press trips
 - 1 group press trip / 5 journalists in June
 - 2 individual press trips in August & October
- Results Q1-Q3
 - 121 press hits
 - Culture, sustainability and wellness (sauna) have been the most popular themes, and summer the most popular season
 - More press trip results coming up in Q4, for example a Finland issue of TRANSIT magazine and 10 pages on Liniere magazine

Japan coverage highlights Q1-Q3











India

- Media trips
 - 9 journalists and 5 influencers
- Case: Ranveer Bran
 - Celebrity chef, Masterchef India judge, author & restaurateur
 - Visited Rovaniemi and Helsinki in September 2022
 - Results to date:
 - 99 posts (Instagram, Youtube, Twitter, Facebook)
 - Approx 11.8M reach (excluding Youtube)
 - Estimated Monetary Value: approx 5,5M€ (excluding Youtube)





Influencers / India



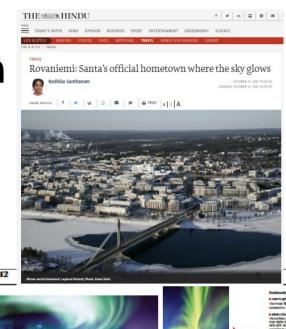
Visit Finland

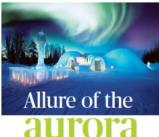
Press hits / India



Finland At Glance: Of Sauna, Santa And A Mesmerising Phenomenon, The Northern Lights







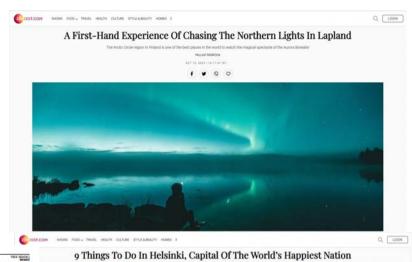






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Mint Lounge, News18, The Hindu, ZeeZest

