

# Market Insights France





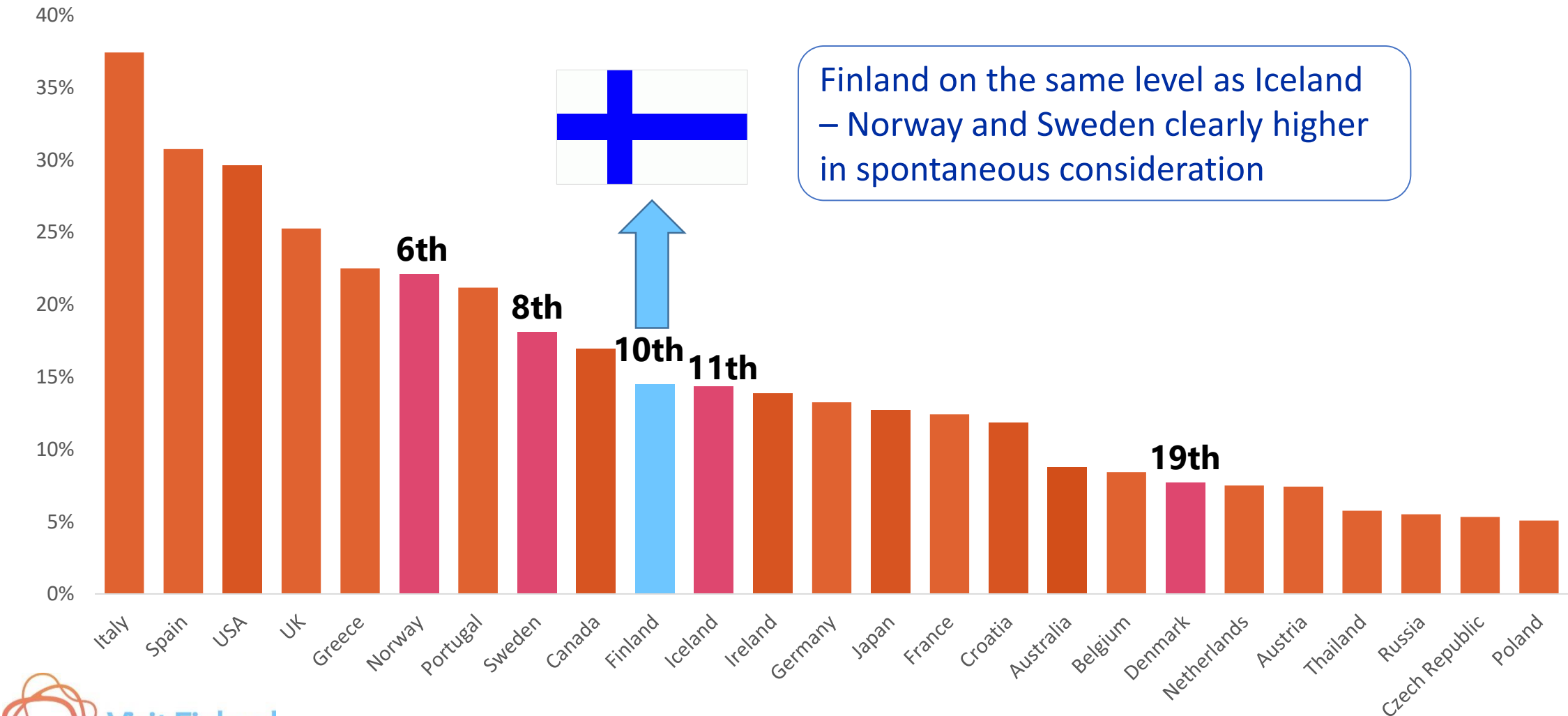
A low-angle shot looking up through a glass and metal structure, possibly a geodesic dome or a modern architectural feature. The structure's frame is made of dark metal and glass panels. Through the glass, a vibrant aurora borealis (Northern Lights) is visible in the sky, displaying shades of green and blue. The ground is covered in snow, and several evergreen trees are visible in the background, their branches dusted with snow. The overall scene is serene and evokes a sense of being in a remote, natural location.

# Finland's image as a travel destination in France

Brand Tracking survey 2019

When asked spontaneously which countries they would consider as a holiday destination in the next three years, Finland struggles to stand out from its Nordic competitors, ranking in the middle at #3

Spontaneous Destination Consideration



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 (1,200)

*Countries in northern Europe, where it's cold, you can see the Northern Lights and the population is very open-minded*

*For me Finland is ideal for a trip in the winter to see the Northern Lights and doing activities such as skiing and sledding, Father Christmas, Fjords and the Northern Lights*

*Nature walk in the snow, sledding,  
pretty towns, sauna, cold, ice, snow,  
lake, aurora borealis*

*Lakes, nature, snow,  
lifestyle ..... Santa Claus!*

*Not much, a cold country  
with bizarre culinary  
customs but with  
gorgeous environments.*

*Lakes, Lapland, forest,  
midnight sun*

*Magnificent scenery  
and diverse wildlife*

*Snow, cold, reindeer,  
nature, quiet, calm*

*Northern countries where the people are very welcoming. and as all countries of the north, the scenery is beautiful.*

*Country of Father Christmas,  
it's cold, there is snow*

*Many beautiful landscapes, whether summer or winter. Fascinating country in but also quite expensive*

*Nature, Helsinki, Lapland,  
islands, lakes, legends*



Visit Finland

### Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.

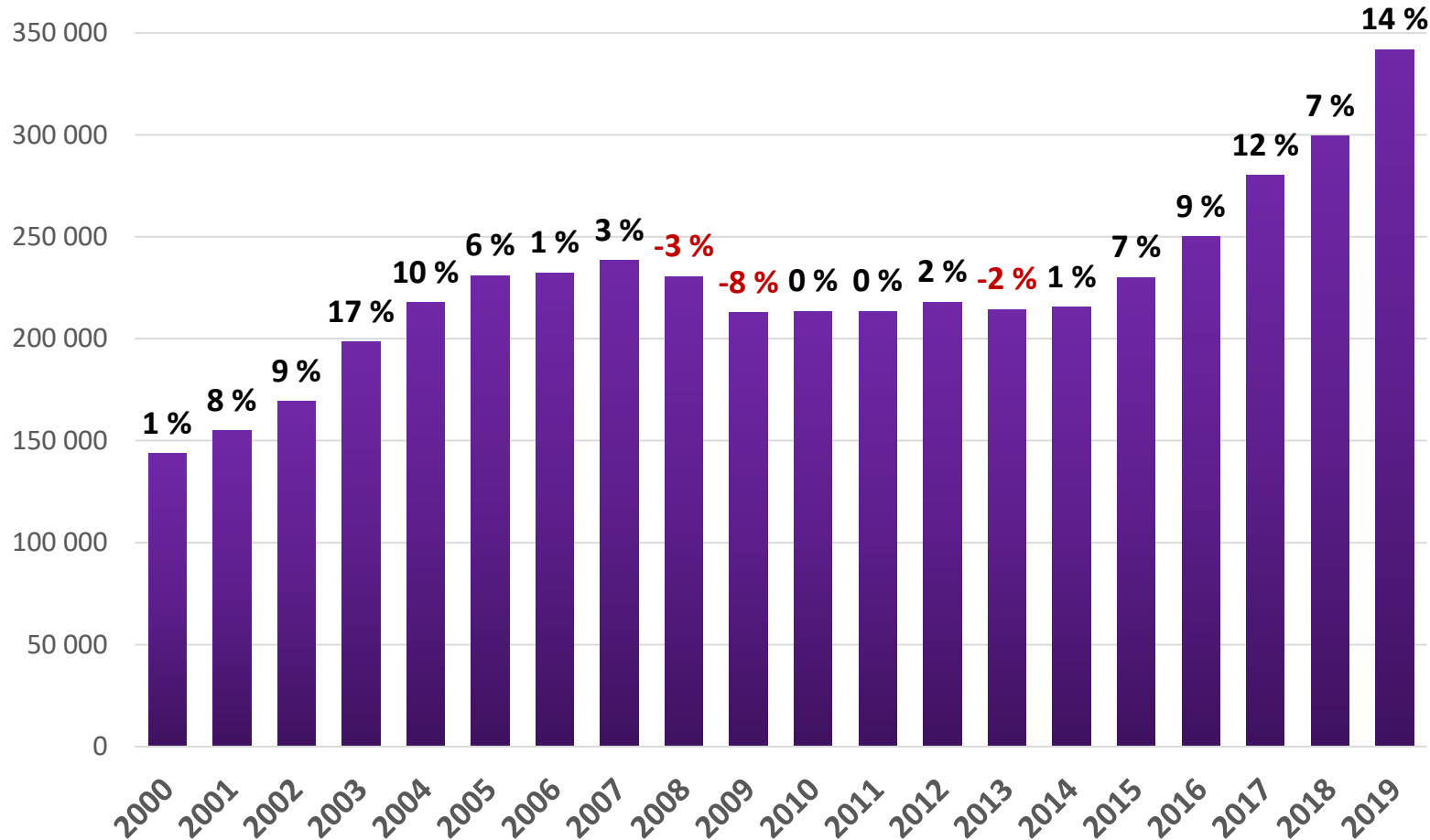
Base: Consideration Set: Finland (555)



# FRENCH OVERNIGHTS IN FINLAND AND IN THE NORDICS



# French overnights in Finland (pre-covid19)



## Year 2019

**341 700** overnights in total

**6<sup>th</sup>** in country rankings  
with a **5% share** of foreign overnights

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

Change 2019 compared to 2000: **+138%**

## Share of overnights by regions 2019



27%



8%

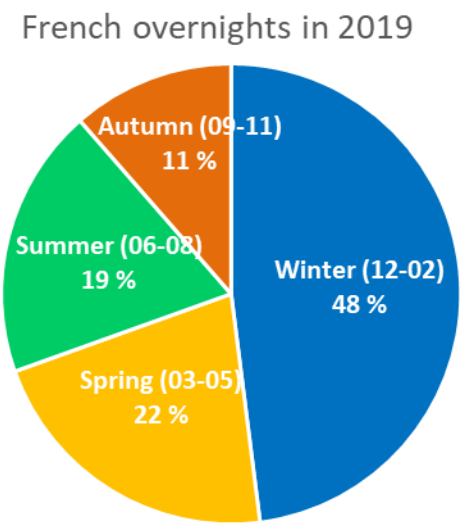
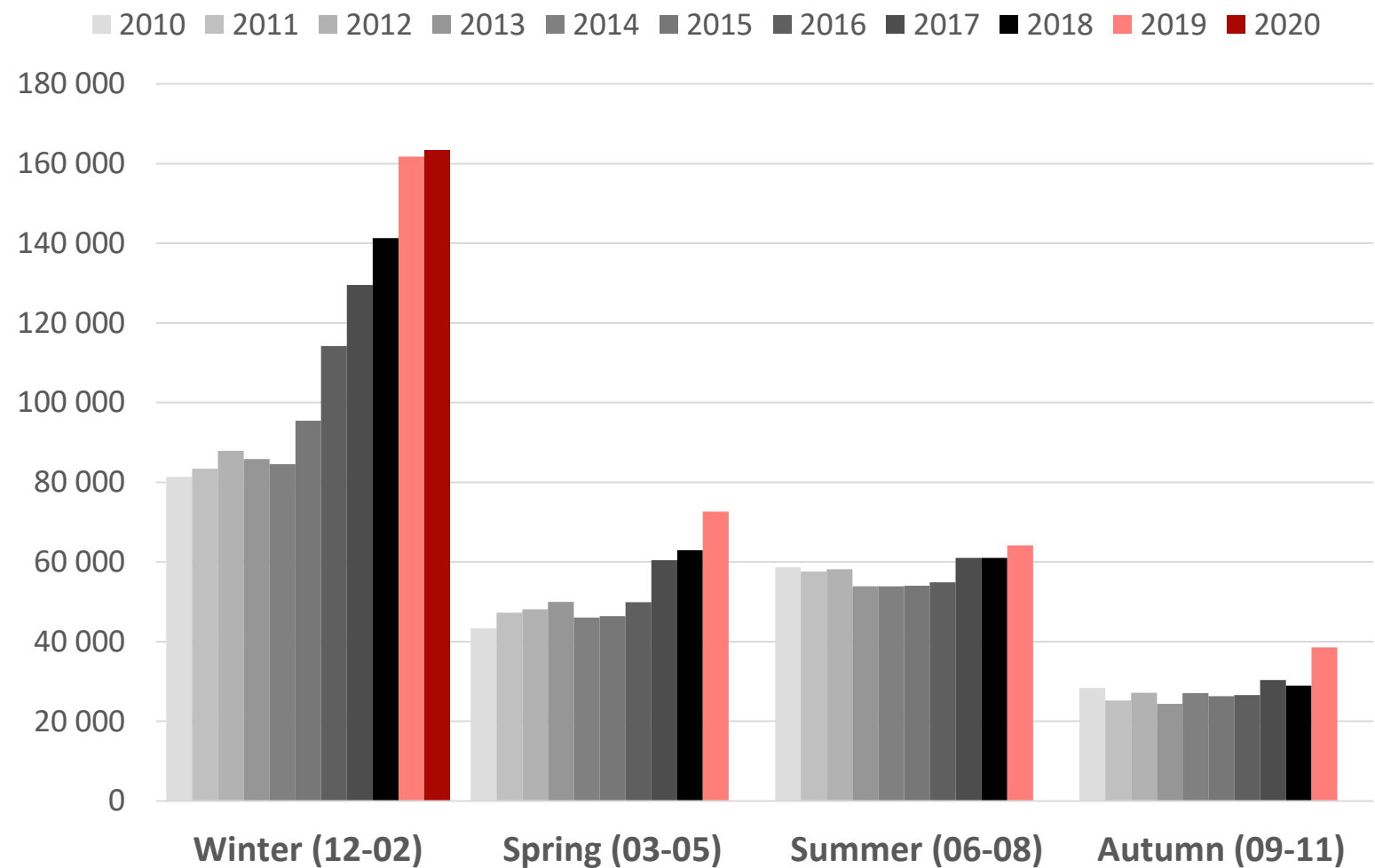


11%



**54%**

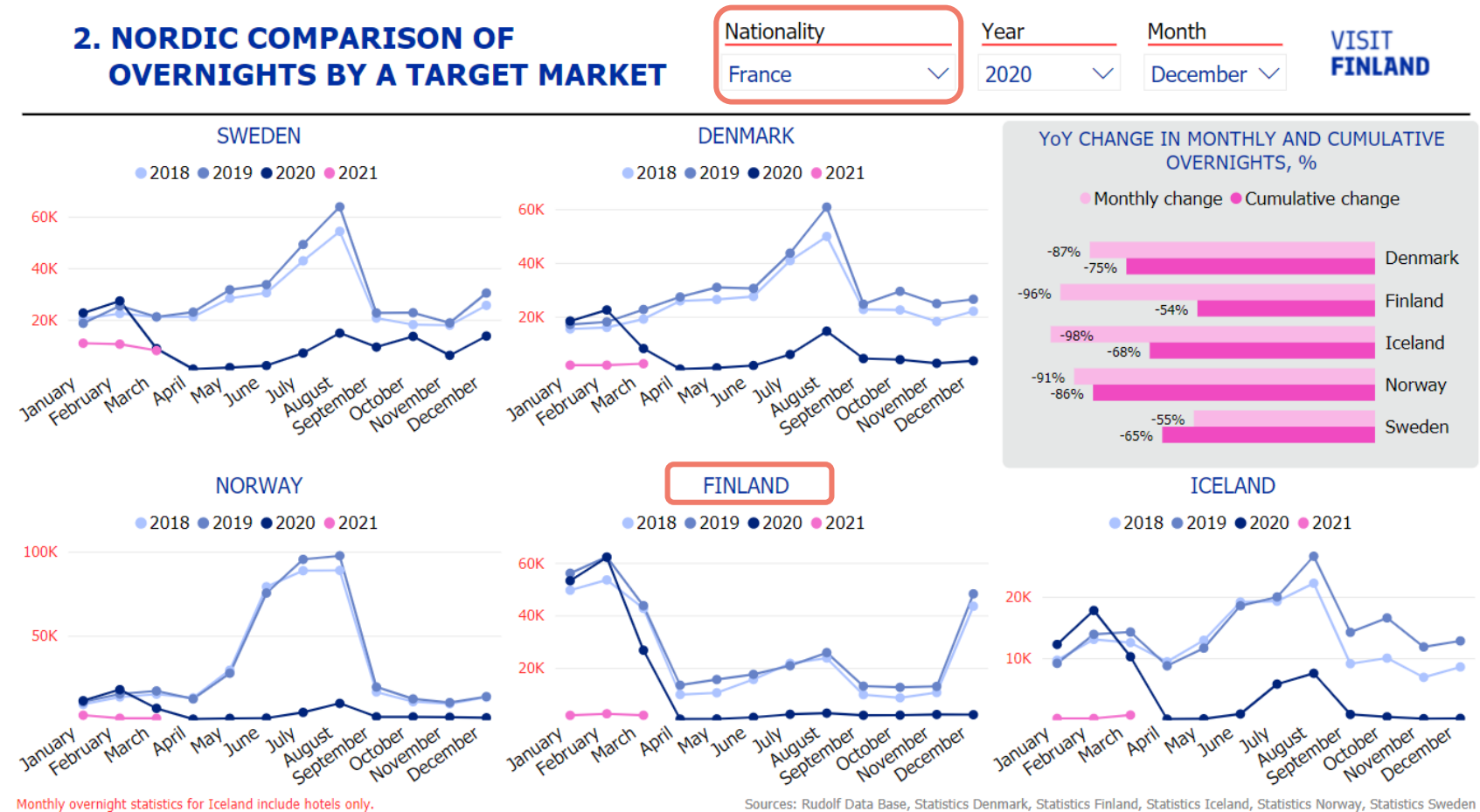
# Seasonality of French overnights in Finland (pre-covid19)



# French overnights in Nordics

## Monthly trend

- **August** has been the most popular month for the **French travellers** to visit the Nordics.
- However, **Finland's** profile is totally different with the French visitors mostly **spending holidays in Finland during the winter months** from December to March.
- Due to the strict travel restrictions in Finland and Norway, travel from France to these countries has been nearly non-existing since April 2020. Sweden with looser travel policy and Denmark and Iceland with border openings in summer 2020, attracted some French visitors despite the pandemic.
- **Finland's share of the French visitors among the Nordic countries was 21% in 2019.**





# French overnights in Nordics

## Seasonal trend

- **Finland** has clearly been **#1** choice among the Nordics for the French travellers during the **winter season** (around 40% market share)
- **80%** of the French winter time visitors to Finland travel to **Lapland**
- During the **summer season**, **Norway** is clearly the most popular destination among the Nordics for the French visitors
- Finland's share in the summer season 2019 was only 9% of the French overnights in the Nordics
- Traveling from **France to the Nordic countries** was on the rise both in winter and in summer pre-covid

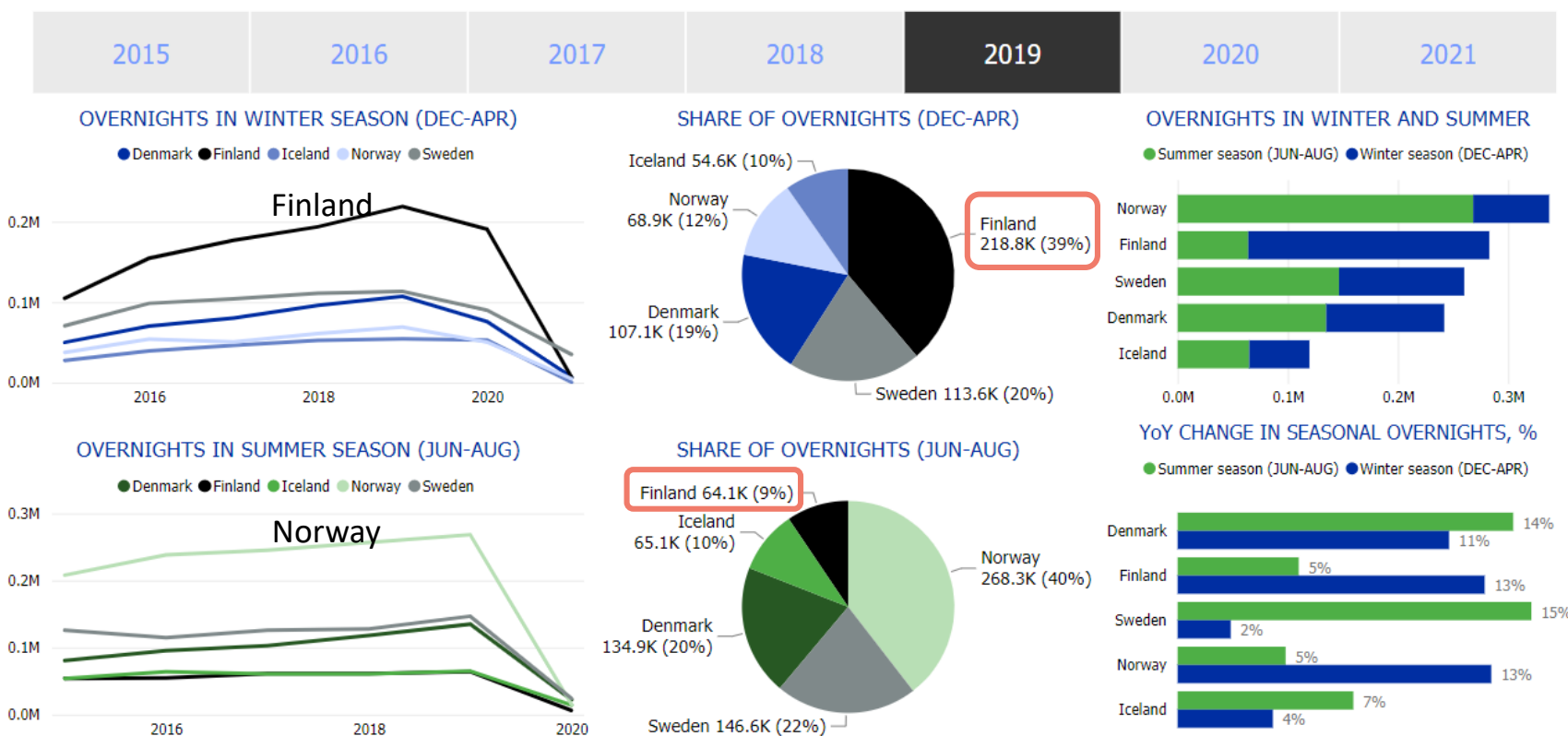
### 5. SEASONAL OVERNIGHTS BY A TARGET MARKET IN THE NORDIC COUNTRIES

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

Nationality

France

VISIT  
FINLAND





# DIGITAL DEMAND 2020

TOURISM-RELATED INTERNET  
SEARCHES ABOUT FINLAND





# France is #6 market by the volume of tourism-related searches about Finland

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

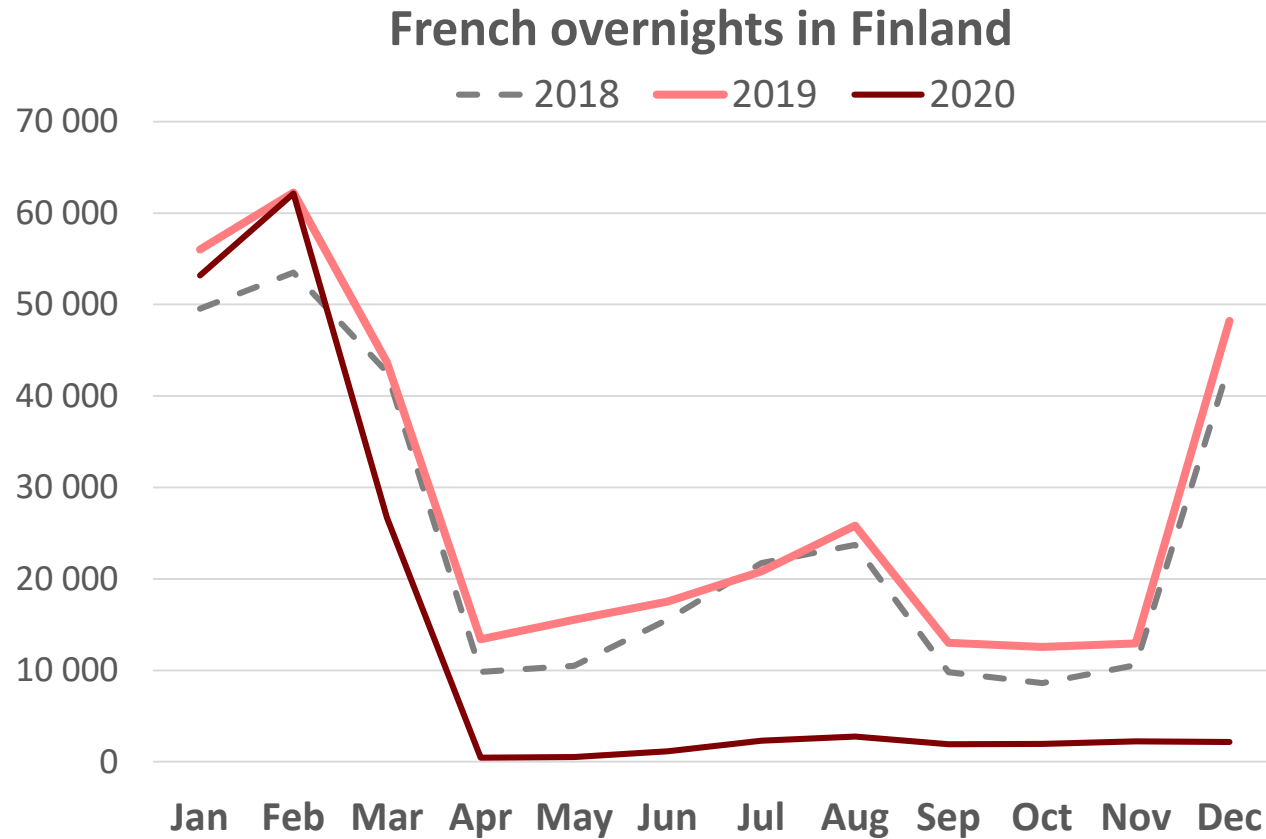
Source: [Digital Demand /Visit Finland 2021](#)

## Target Market Distribution

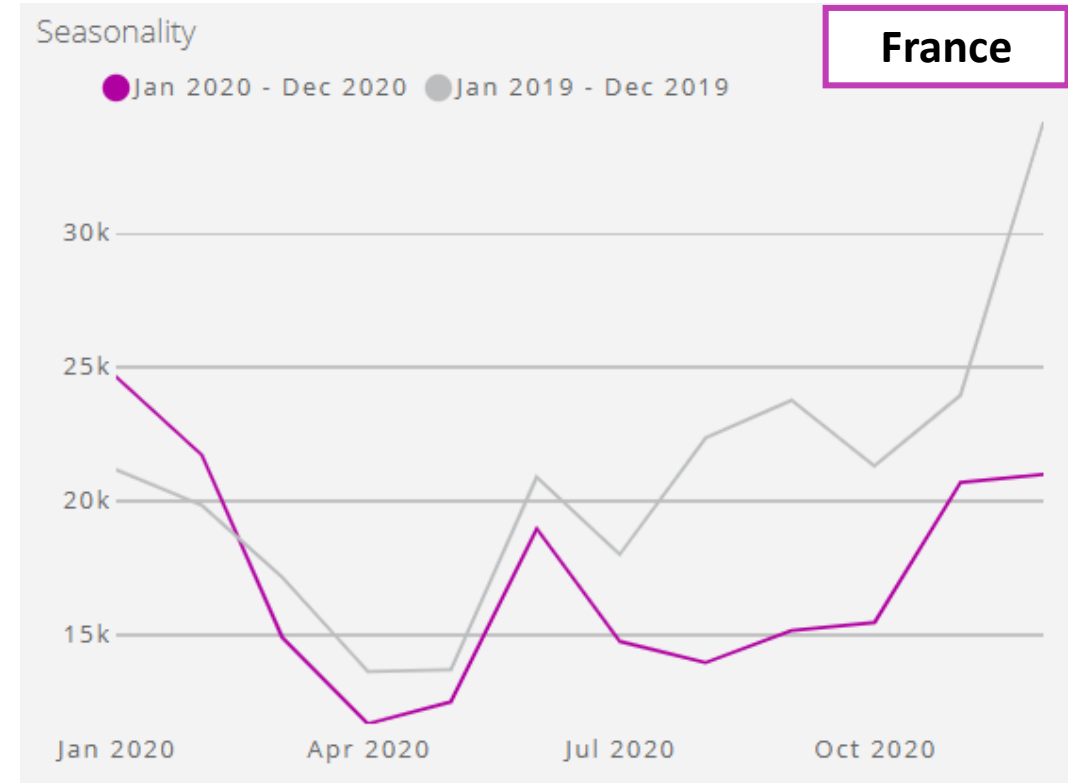
Rank	Flag	Country	Searches	Growth
1		Japan	488,824	-13.3%
2		Germany	480,439	-3.5%
3		United States	457,516	5.4%
4		Russia	347,434	-36.5%
5		United Kingdom	333,867	-7.3%
6		France	205,467	-17.8%
7		China	201,482	-63.3%
8		Spain	182,232	-11.3%
9		Netherlands	180,535	24.8%
10		India	171,296	5.7%
11		Estonia	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 **FRANCE**



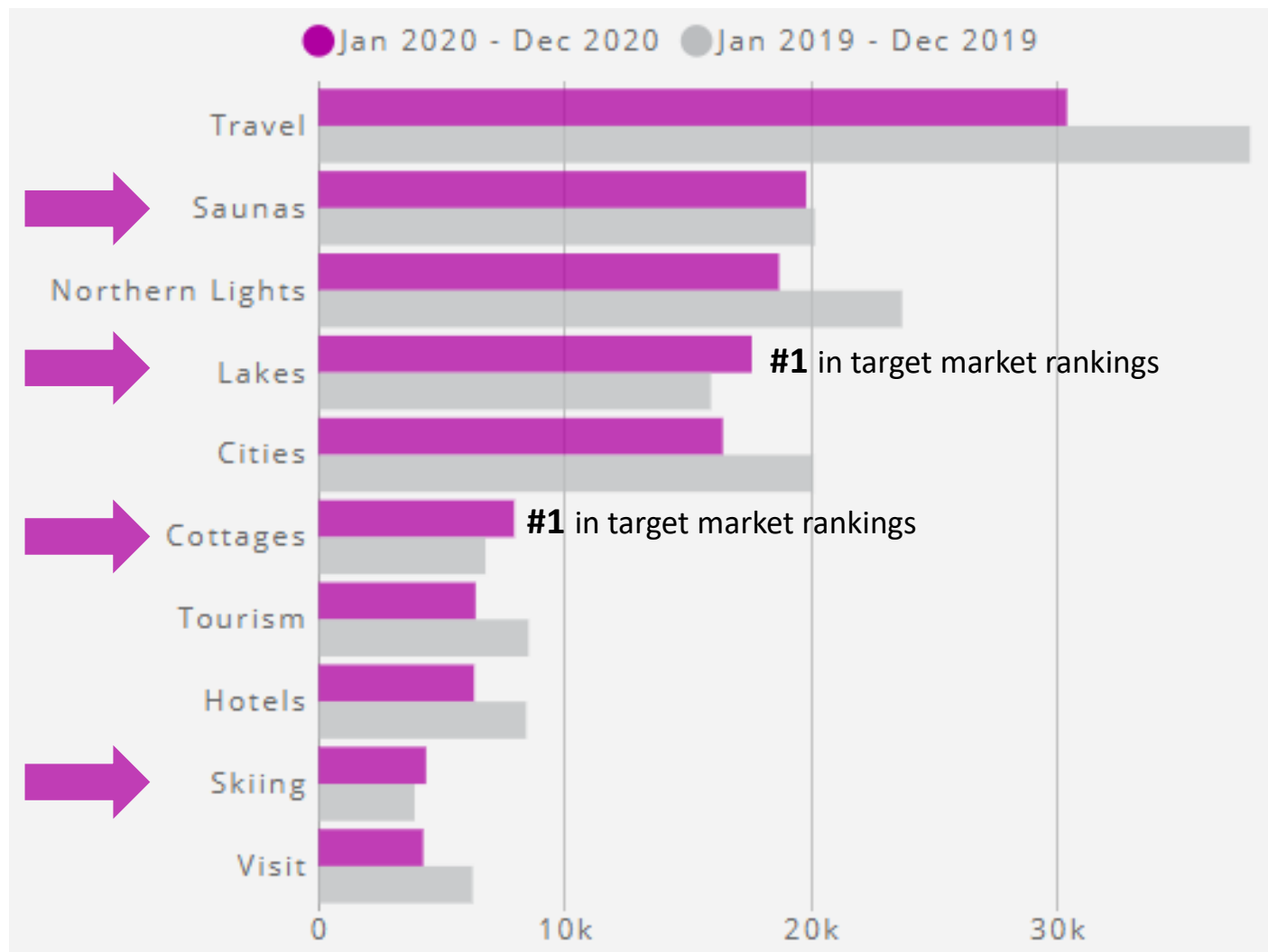
**Travel related searches for Finland**



- French overnights as well as travel related searches concentrate on winter
- French overnights decreased in 2020 by **54%**, while searches decreased clearly less, by **18%**, compared to 2019



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

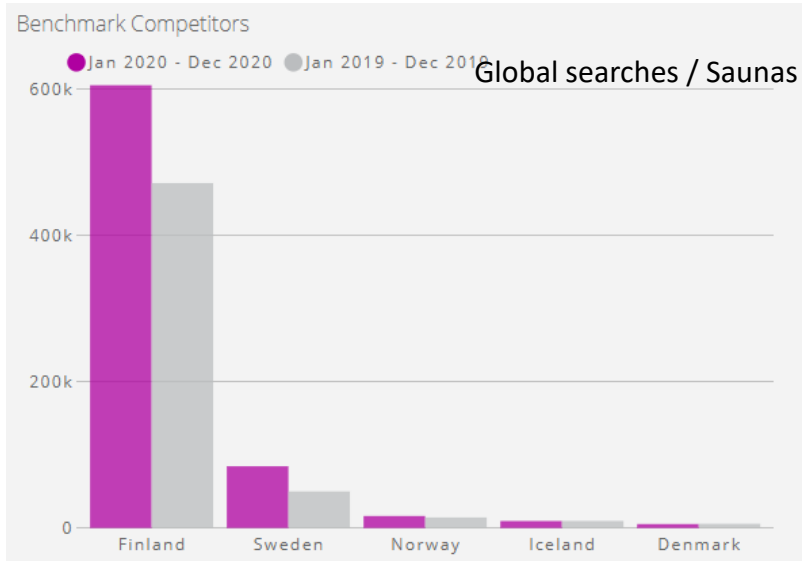


- French are doing the most searches on **Lakes** and **Cottages** among the travel enthusiast in VF target markets
- Searches for **Lakes**, **Cottages** and **Skiing** even increased during 2020 compared to 2019, **Saunas** kept the same good level of searches

	France's ranking	YtoY change for France
Saunas	5.	-2%
Northern lights	7.	-21%
<b>Lakes</b>	<b>1.</b>	+10%
Cities	6.	-18%
<b>Cottages</b>	<b>1.</b>	+17%
Skiing	5.	+12%

# Saunas:

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

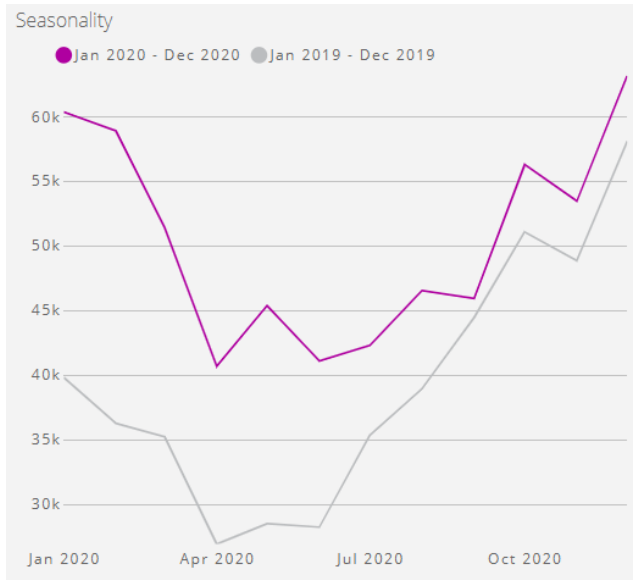


## Travel-related searches on Saunas for Finland in 2020

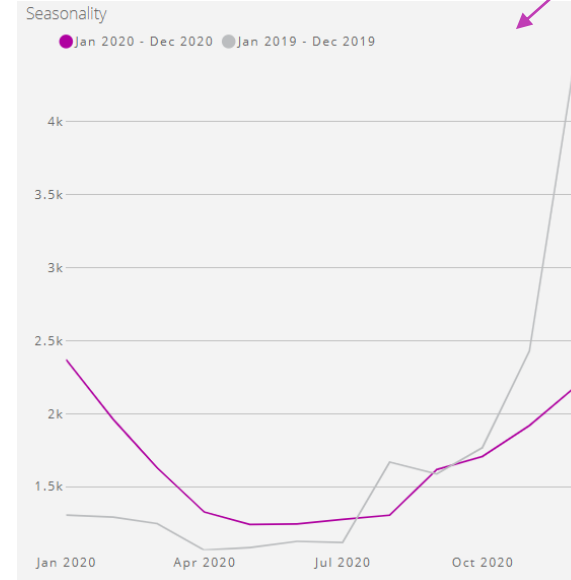
### Target Market Distribution

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



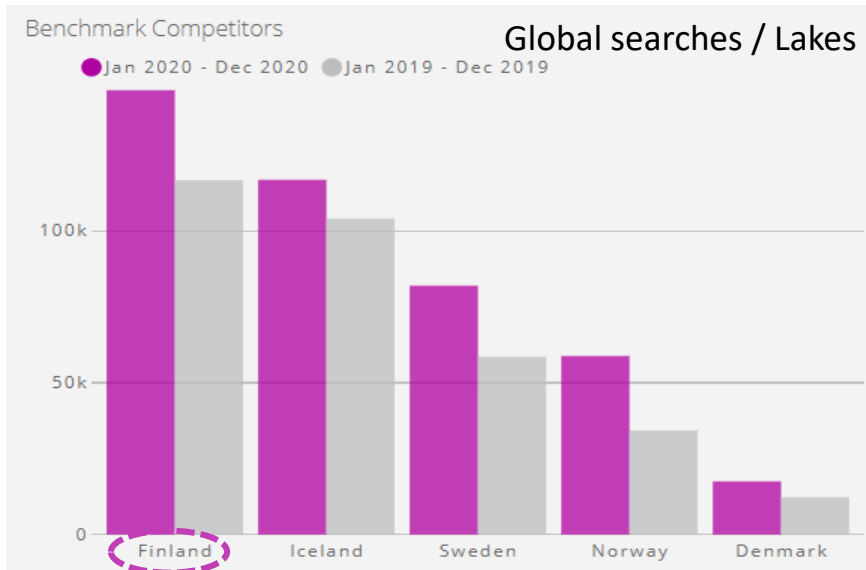
## FINLAND: French searches for Saunas





# Lakes:

Interest increasing in overall and **France #1** in Lakes searches for Finland

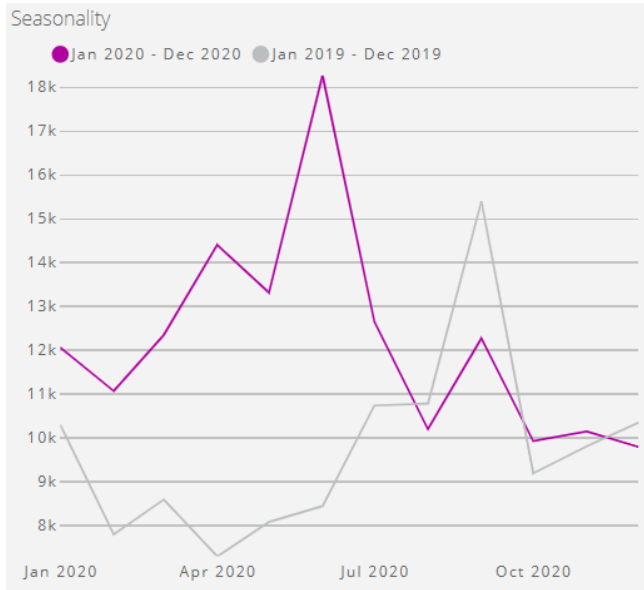


Travel-related searches on Lakes for Finland in 2020

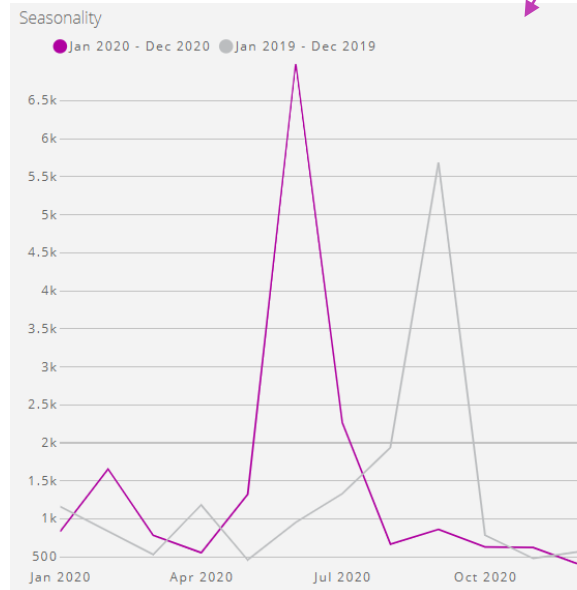
Target Market Distribution

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

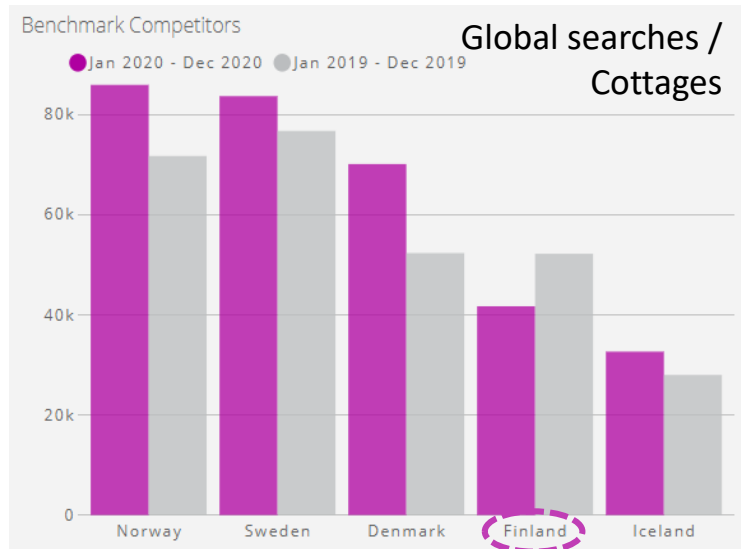


FINLAND: French searches for Lakes

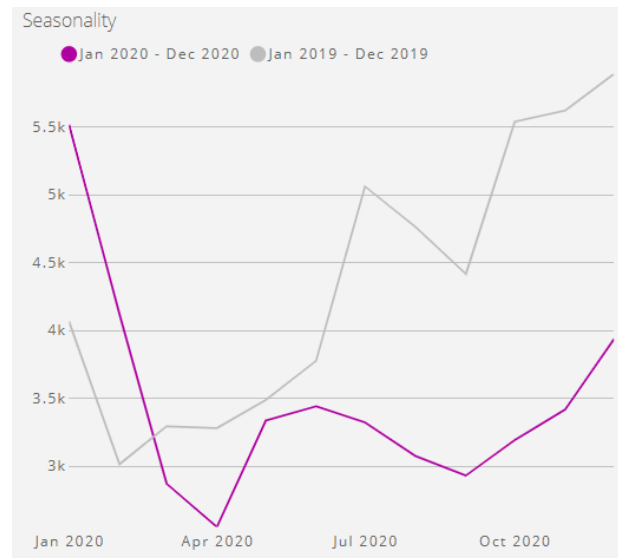


# Cottages:

Interest increasing in other Nordic countries and **France #1** in cottage searches for Finland



FINLAND: **Global** searches for Cottages

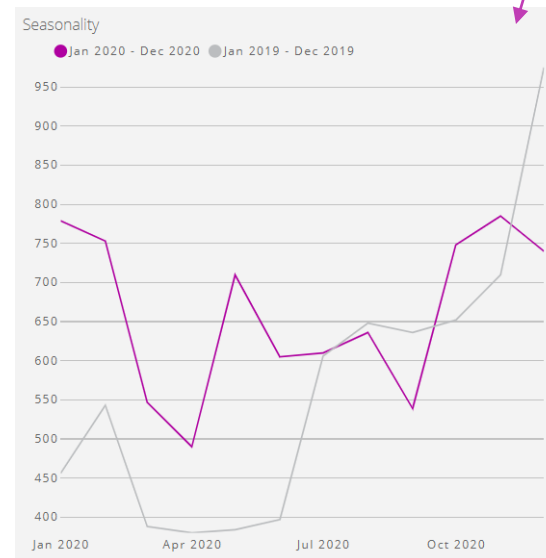


Travel-related searches on Cottages for Finland in 2020

Target Market Distribution

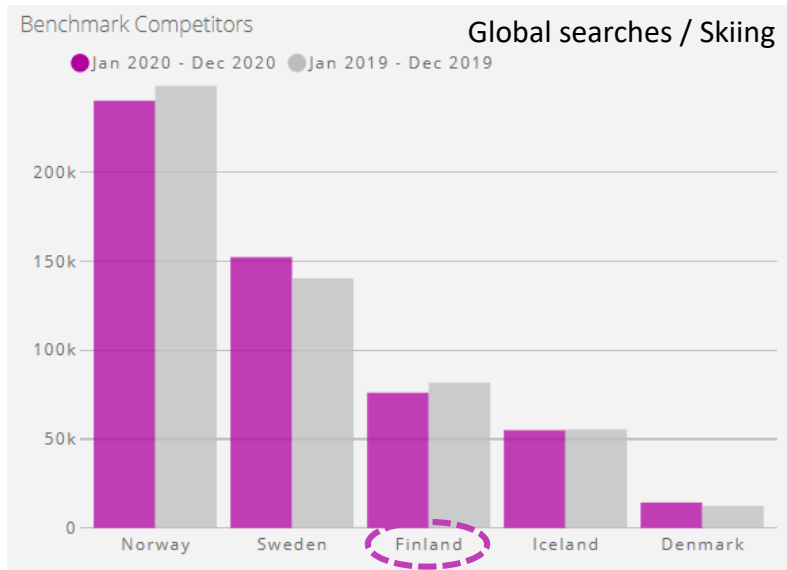
Rank	Flag	Country	Searches	Growth
1		France	7,942	17.2%
2		Russia	6,929	-65.9%
3		Germany	6,291	-2.7%

FINLAND: **French** searches for Cottages

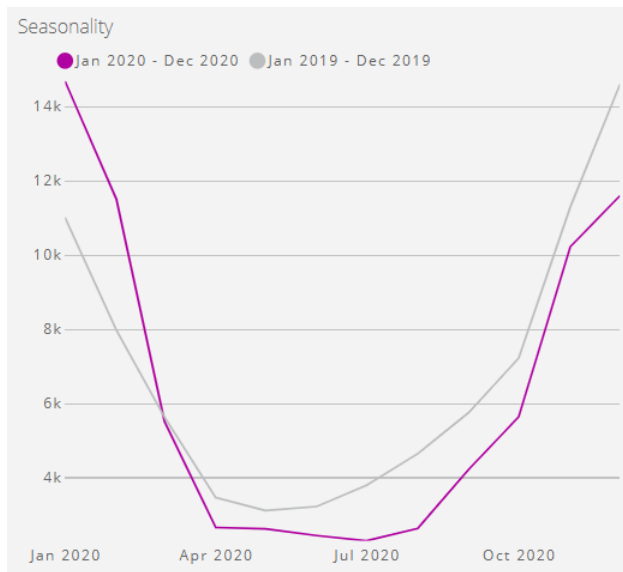


# Skiing:

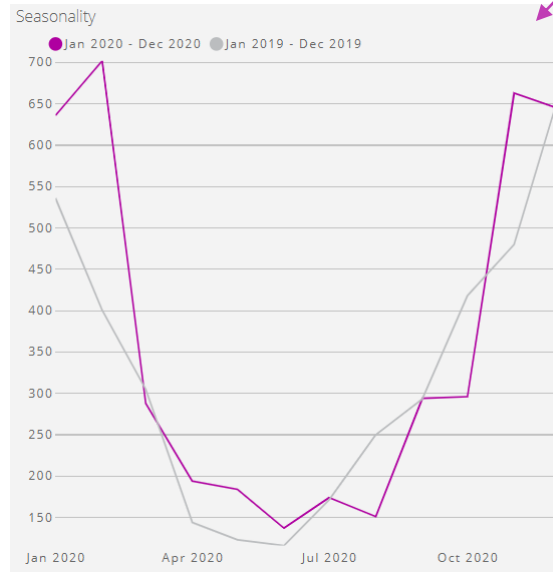
Finland stays far behind Norway and Sweden in the global searches for skiing



FINLAND: Global searches for Skiing



FINLAND: French searches for Skiing



Travel-related searches on Skiing for Finland in 2020

Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		United Kingdom	19,771	5.0%
2		Germany	10,508	30.6%
3		United States	4,752	22.4%
4		Netherlands	4,366	-2.4%
5		France	4,363	11.9%
6		China	3,470	-74.4%
7		Latvia	2,931	52.4%
8		Denmark	2,700	-3.2%
9		Switzerland	2,529	5.3%
10		Sweden	2,393	1.4%



# OUTLOOK ON TRAVEL SENTIMENT AND TRENDS





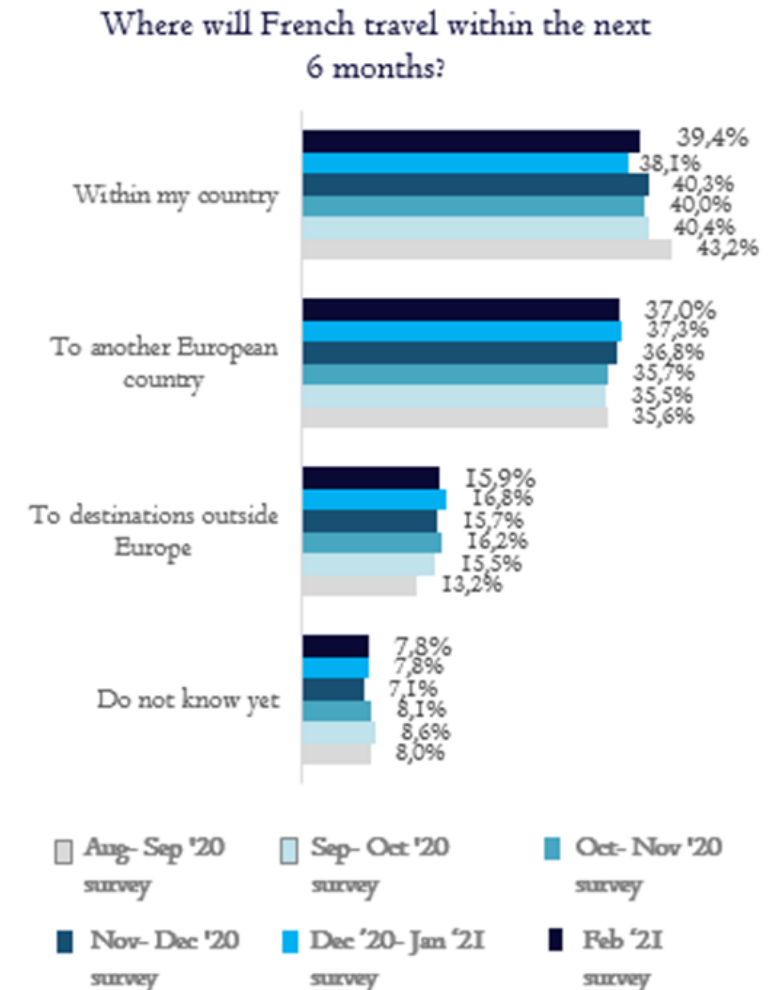
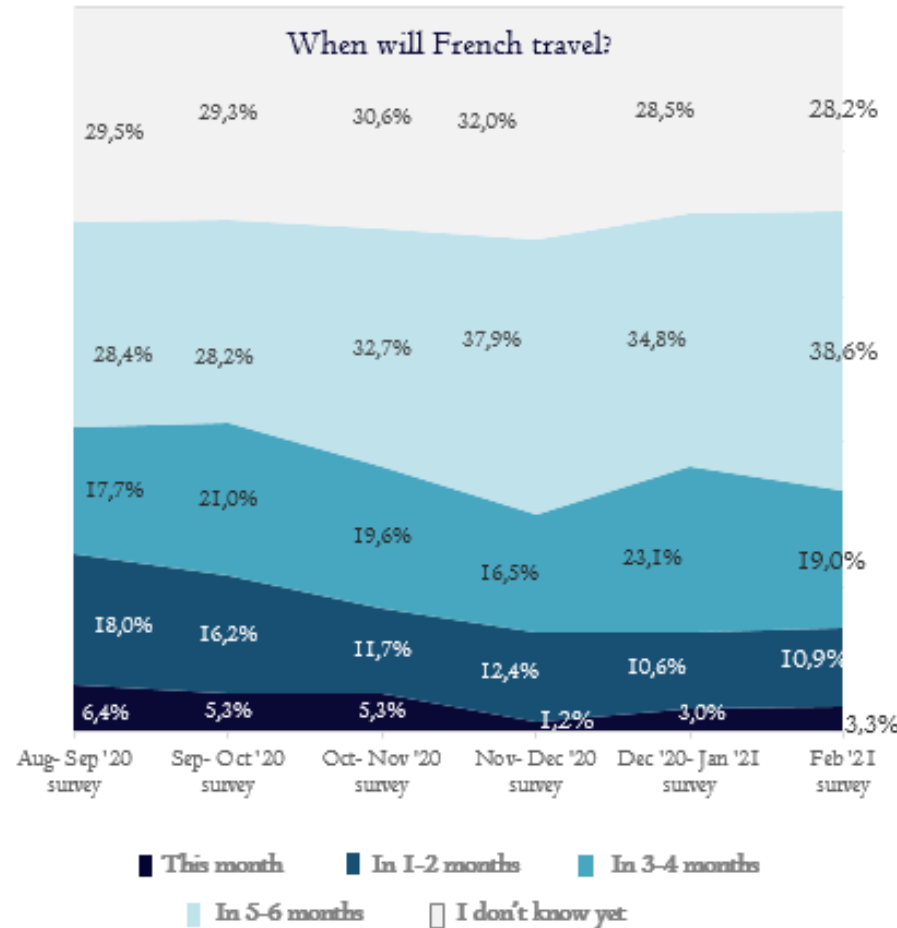
# European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel

## FRANCE

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

According to the survey conducted in February 2021

- **51% of the French** responded that they are likely to travel within the next 6 months
- **39%** were looking at **July and August** for their next vacations
- **37%** aim to travel to **another European country** and 39% 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

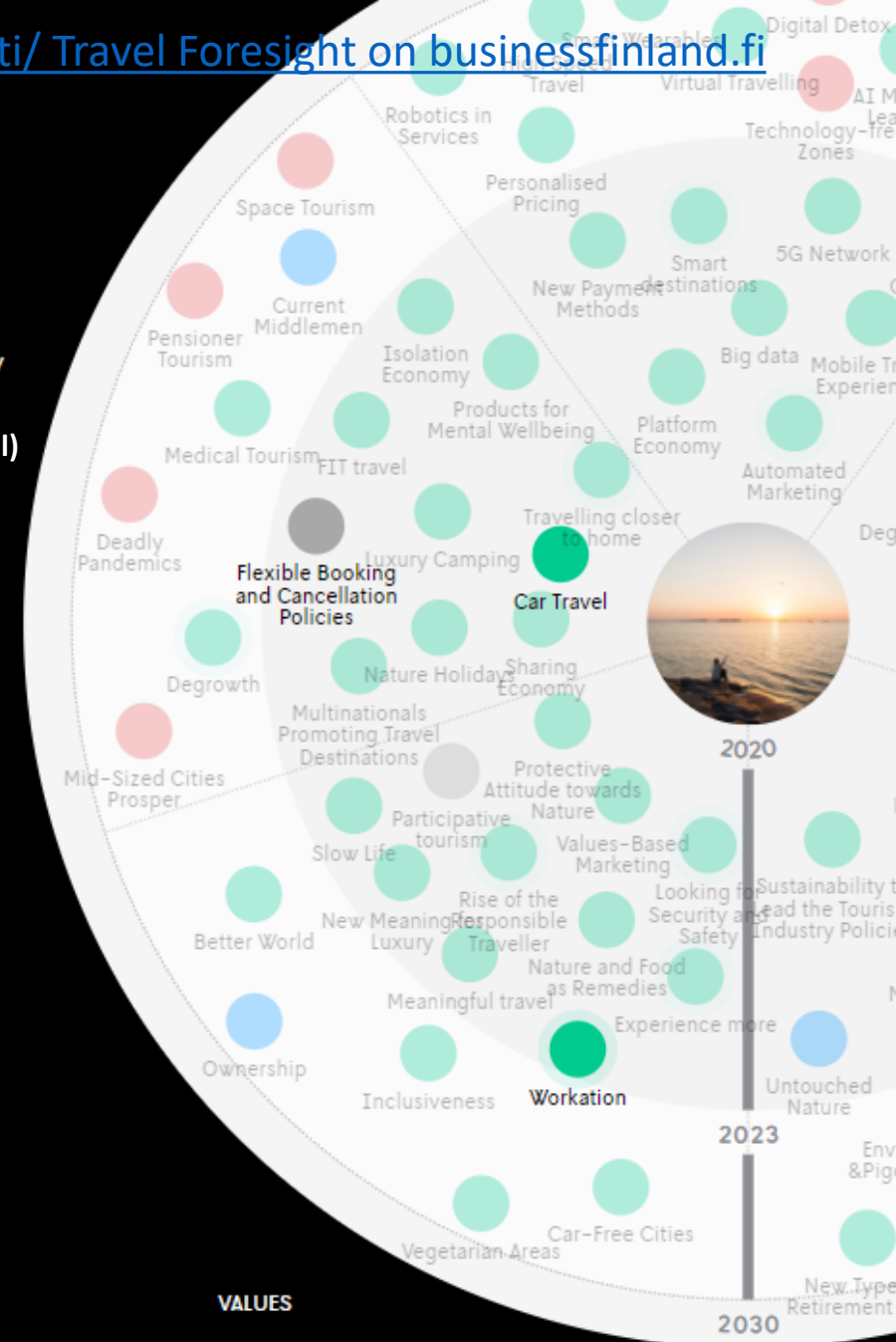
#### Sustainability, authenticity and localhood:

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

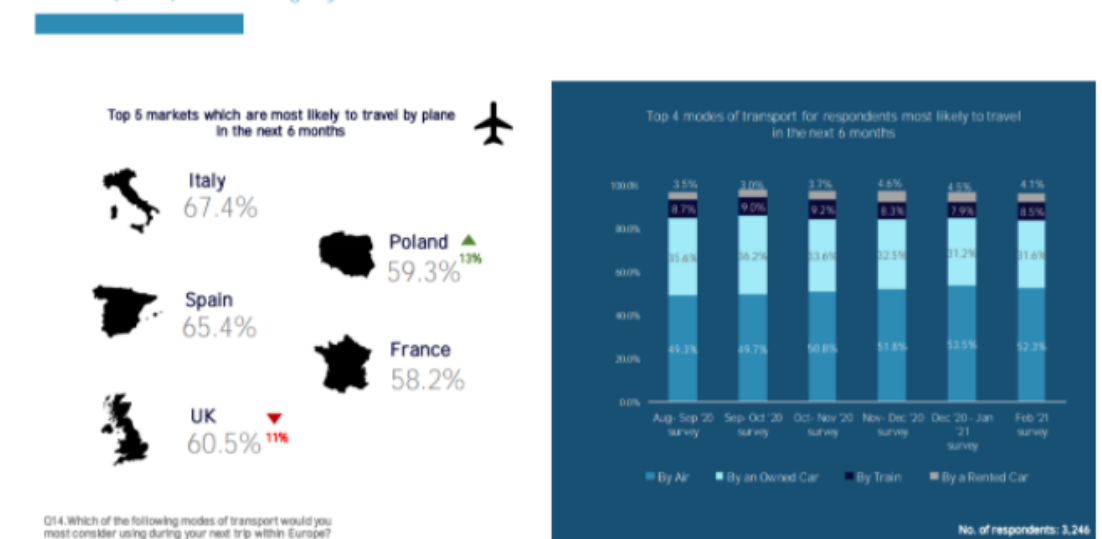


Health concerns and travel restrictions have grown the interest in travelling by land, especially by car or camper van. Driving tours and road trips have become more common and have been regarded as safer and more enjoyable than before. It is anticipated that camper vans will be popular especially among 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

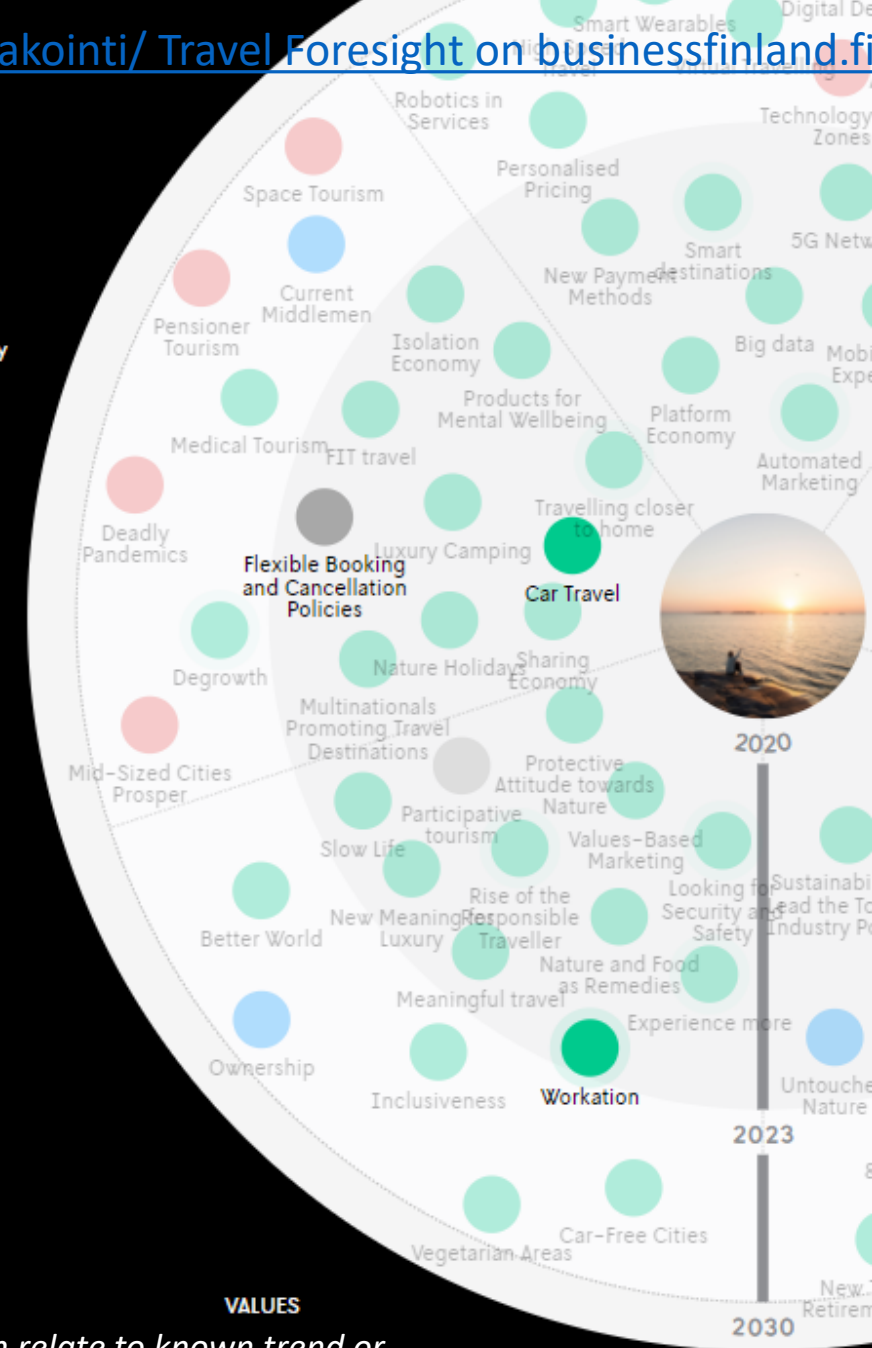




# Europe & USA future change signals

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

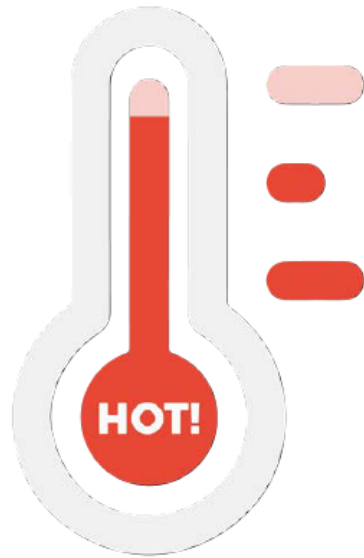
**Weak signals** are smaller change phenomena, often single cases or observations of our time, that can relate to known trend or be a signal of something new, still emerging and uncertain change. In time, these signals might turn into trends or fade out.









# 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

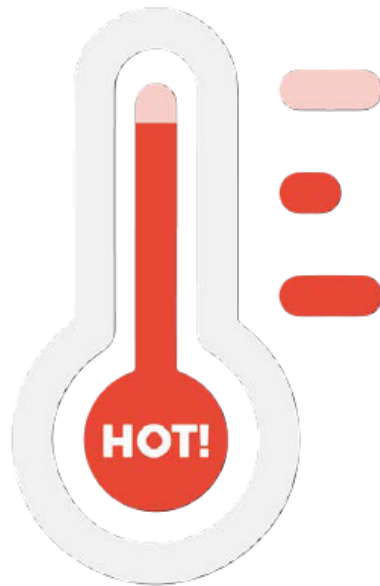
**Q13:** What is your organization's perception of the following consumer motivations, based on consumer demand and bookings over the last year?

**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**