



Visit Finland

# Visit Finland Market webinar France

9.5.2023

# Agenda 9.5.2023

- *Market insights, winter 2022/23 statistics, Forward Keys- summer 2023, Oxford Economics recovery forecast*

Heli Saari, Account Manager

- *Market trends and outlook, market strategy, activity plan 2023*

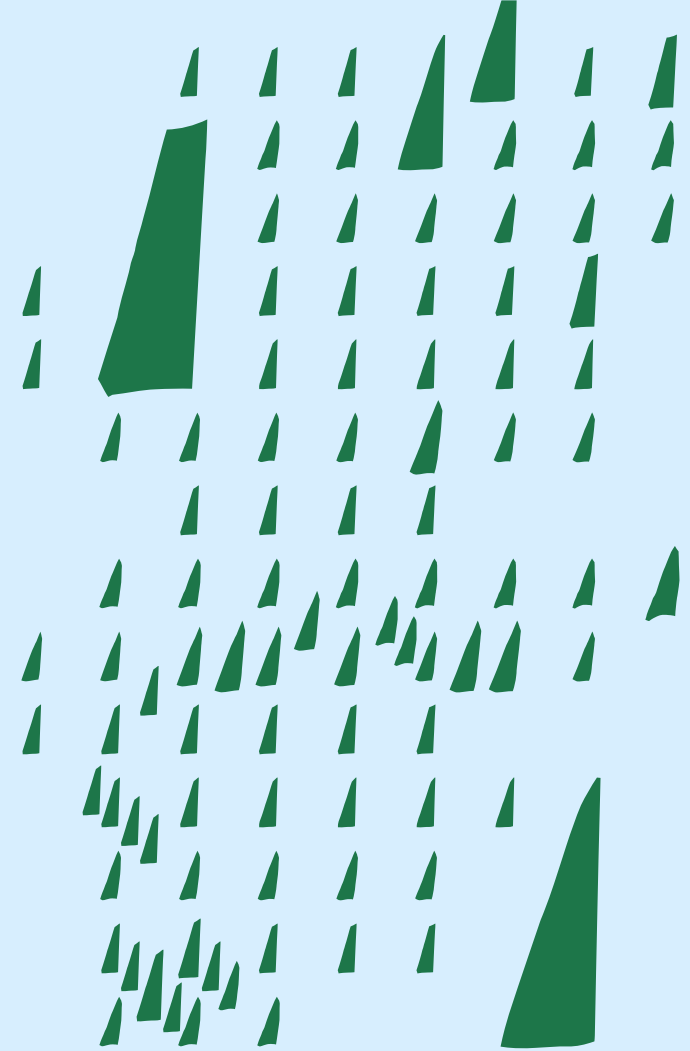
Sanna Tuononen, Sales & Marketing manager France

- *PR & campaign updates for the French market*

Sergei Shkurov, PR & Media manager

- *Q & A*

# France



# Visit Finland France market Team



Heli Saari  
Account Manager,  
France



Sanna Tuononen  
Sales & Marketing  
manager, France



Virva Katajala  
Head of Marketing



Sergei Shkurov  
PR Manager



Susanne Heikkinen  
Analyst



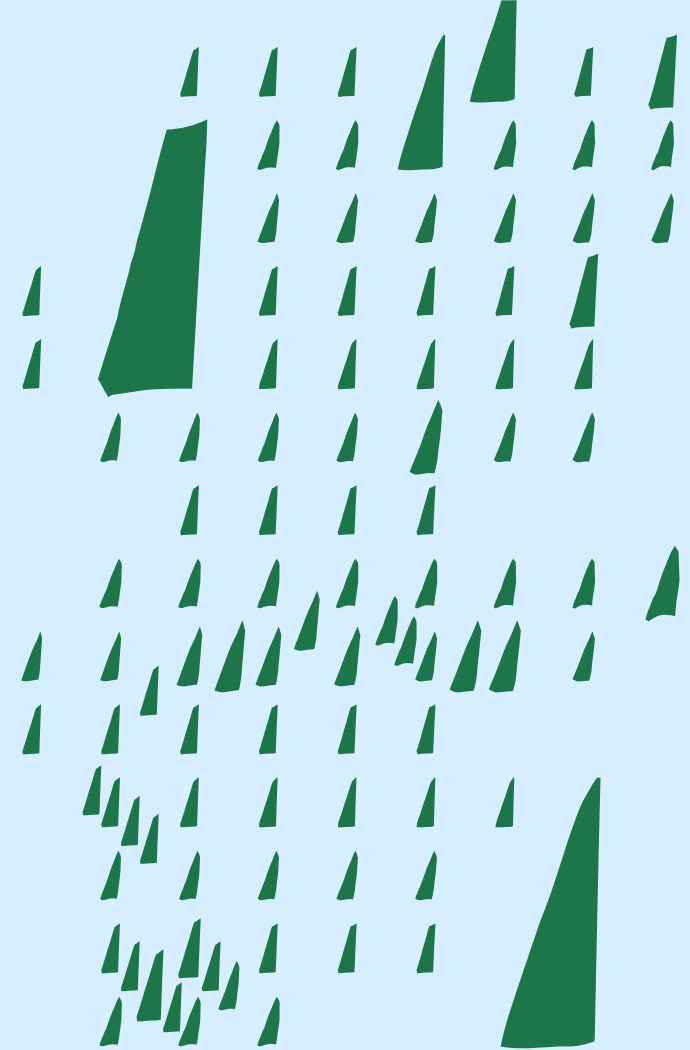
Susanna Markkola  
Regional Partnership  
Manager

# Market Insights



# Overnights in Finland

Year 2022 & Jan-Feb 2023



# Overnights in Finland in 2022 & top source markets

## Year 2022 vs. year 2019

### Overnights in 2022

**Total foreign 5.0 M**

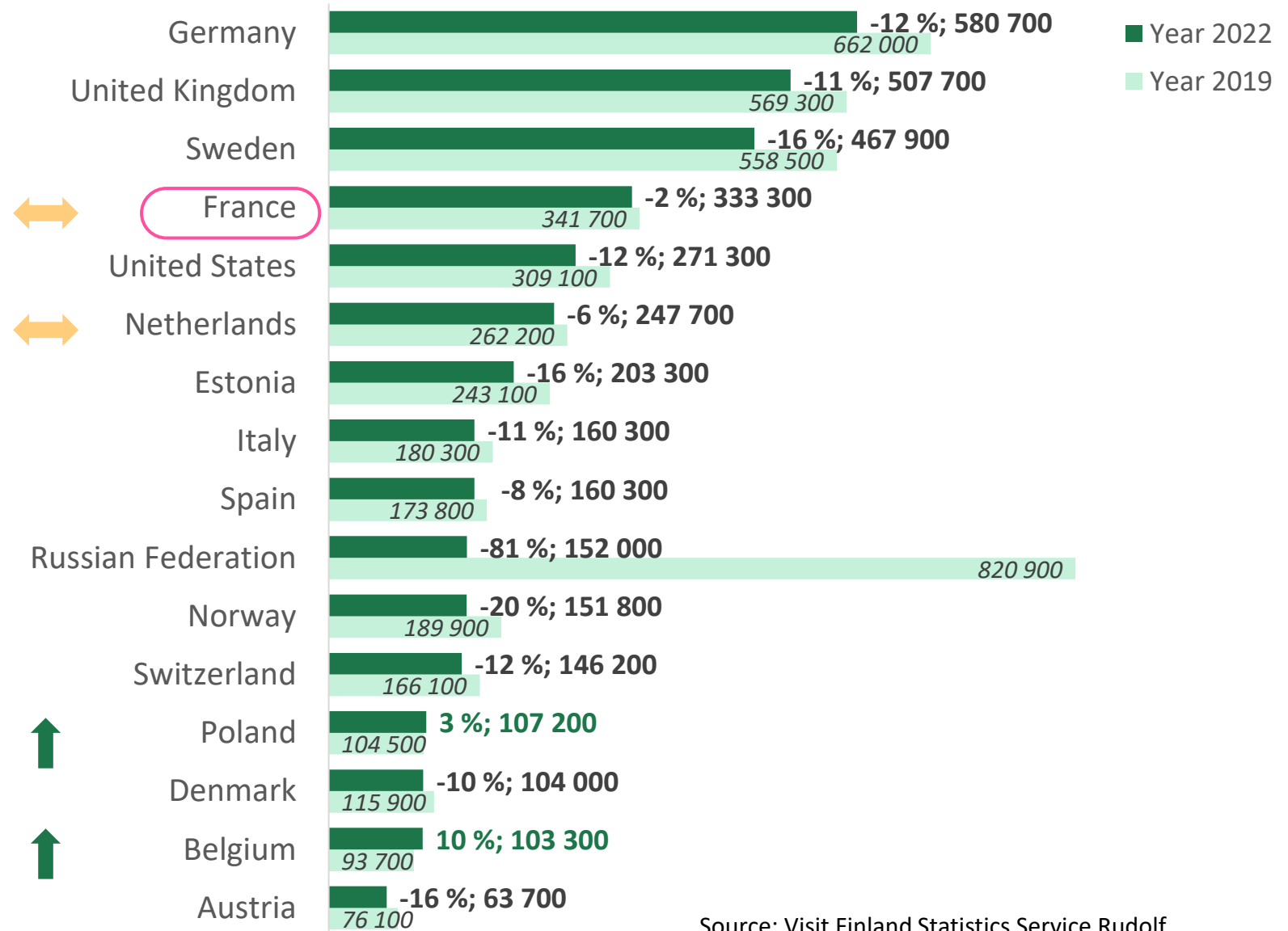
(-29% vs. 2019)

**Foreign excl. Russia 4.8 M**

(-23% vs. 2019)

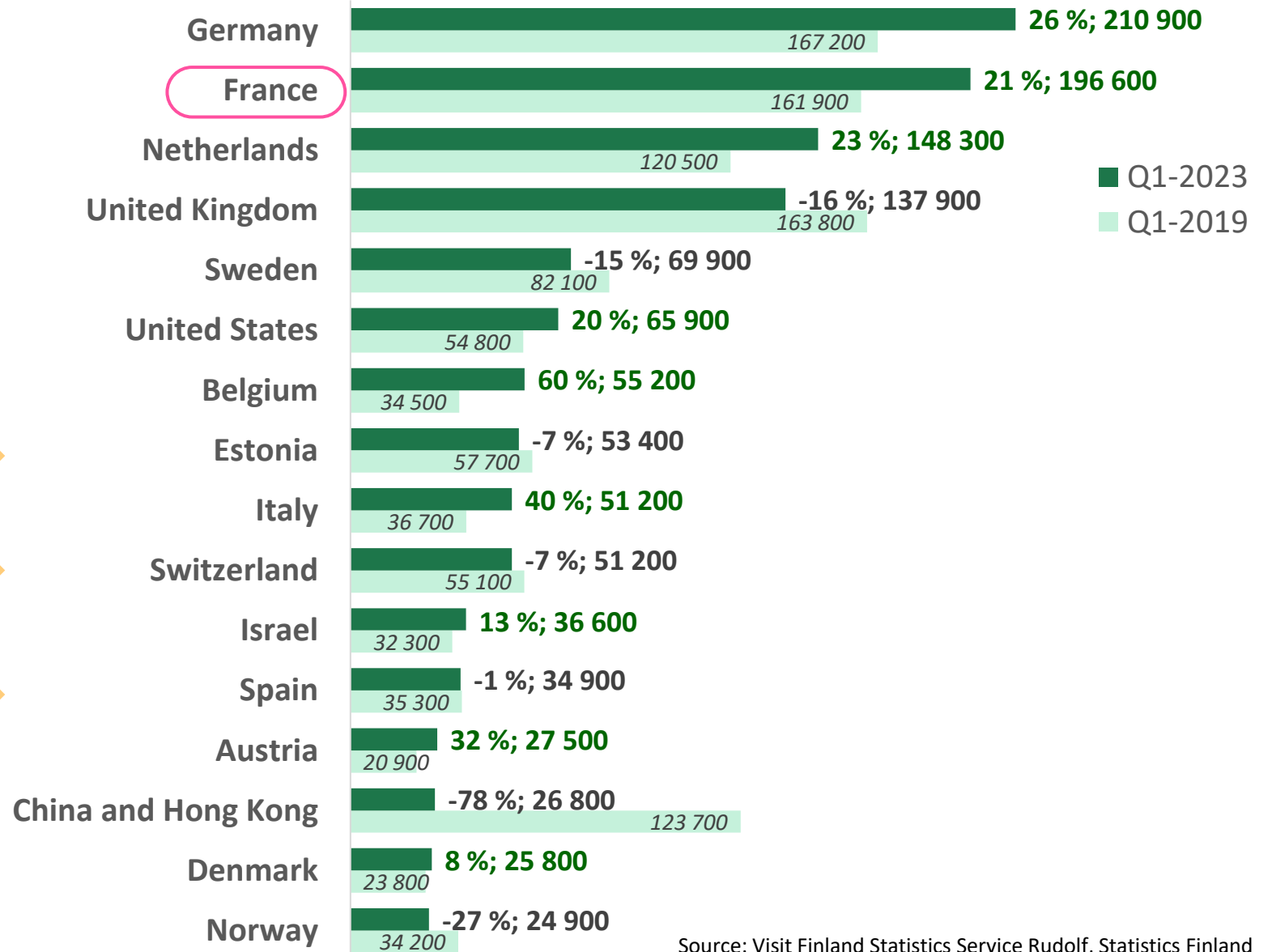
**EU+UK 3.4 M**

(-9% vs. 2019)



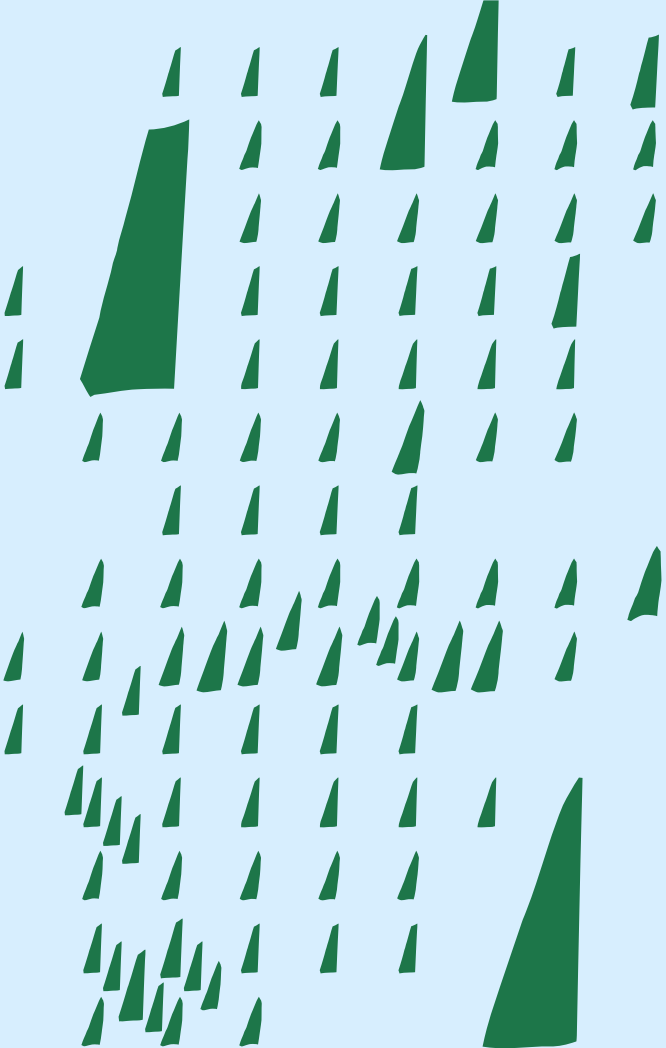
# Top16 countries 2023 – overnights in Finland

Q1-2023 vs. Q1-2019



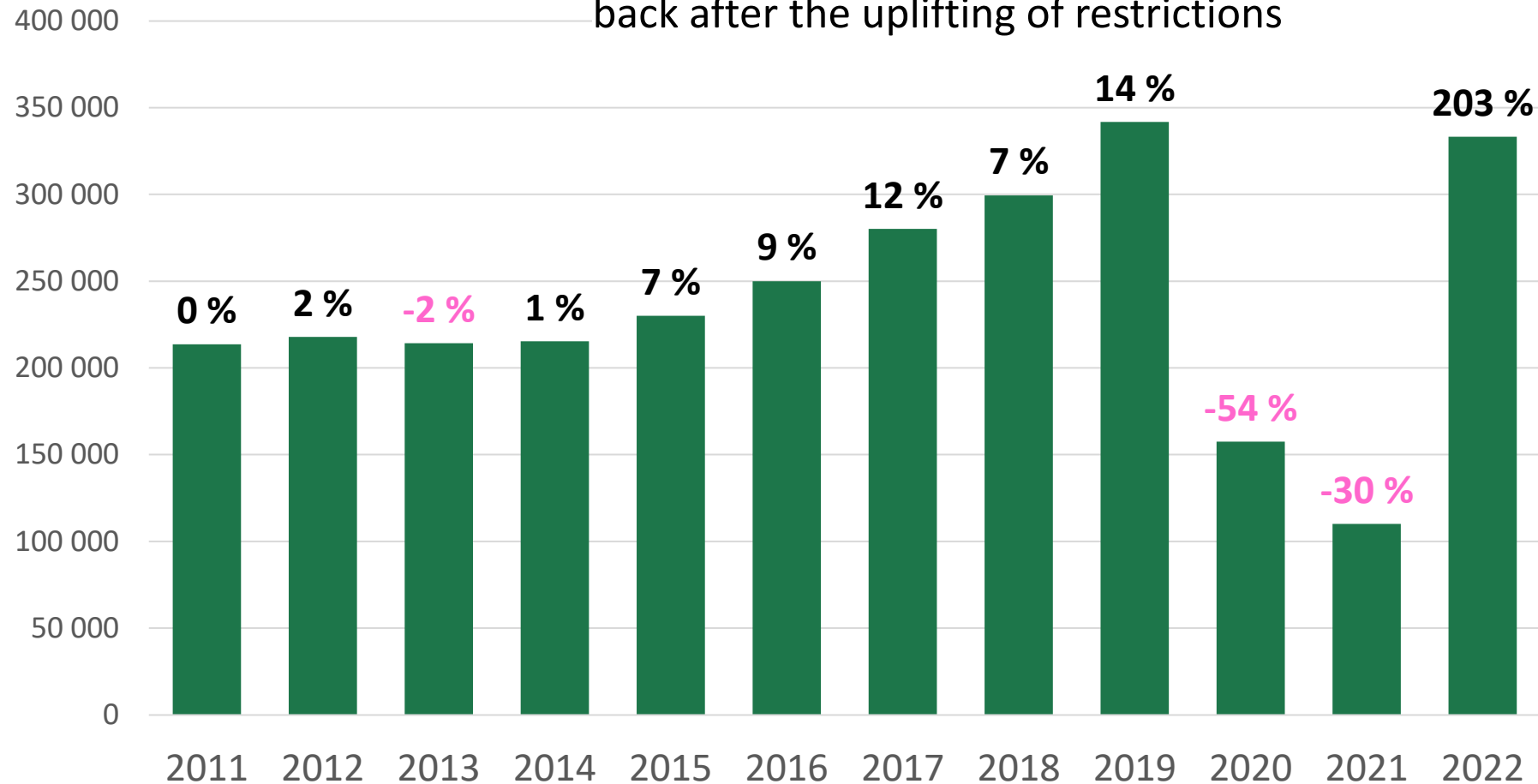


# French overnights in Finland



# French overnights in Finland 2011-2022

Strong growth before Covid-19 and bouncing quickly back after the uplifting of restrictions

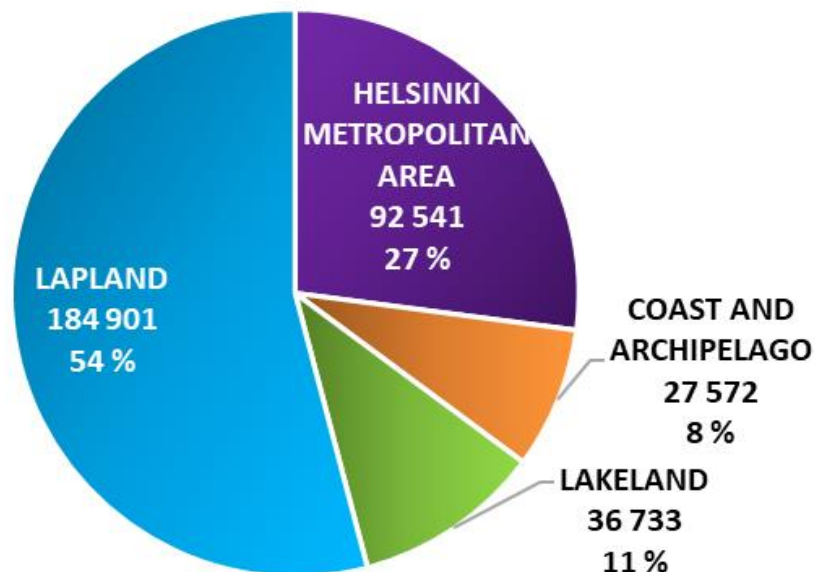


2022  
**333,300** nights  
#4 in market ranking  
YoY change +203%  
2022 vs. 2019 -2%

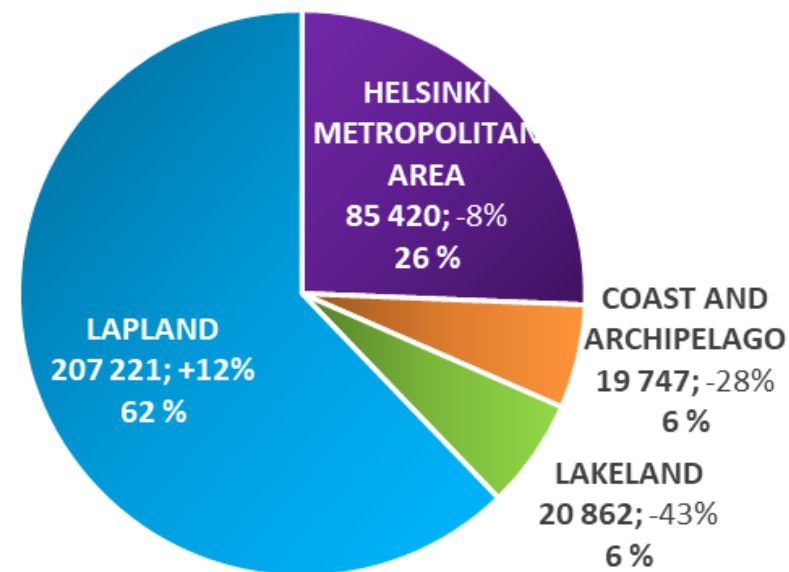
2019  
**341,700** nights  
#6 in market ranking

# French overnights in Main Regions 2019 & 2022

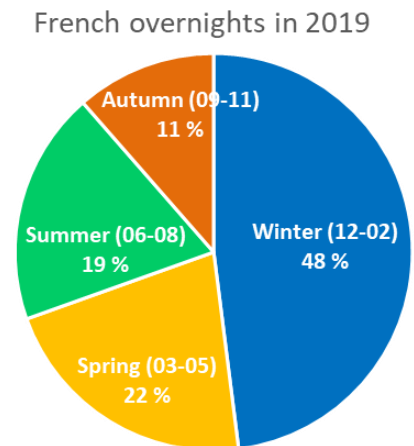
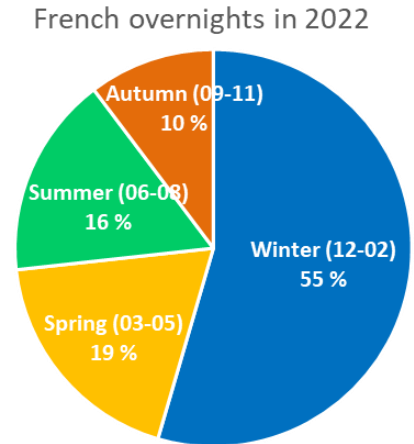
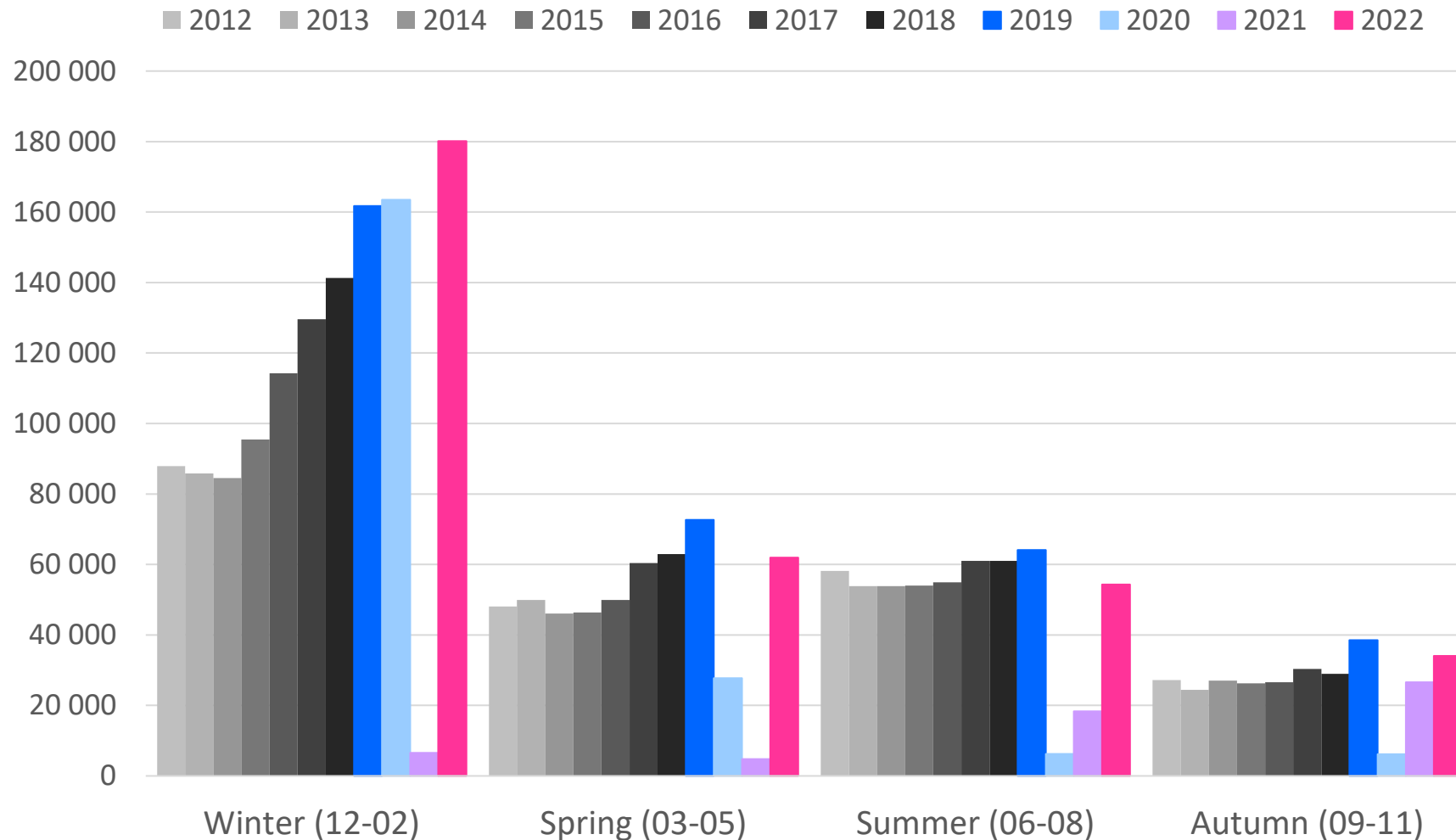
French overnights in main marketing areas  
Year 2019



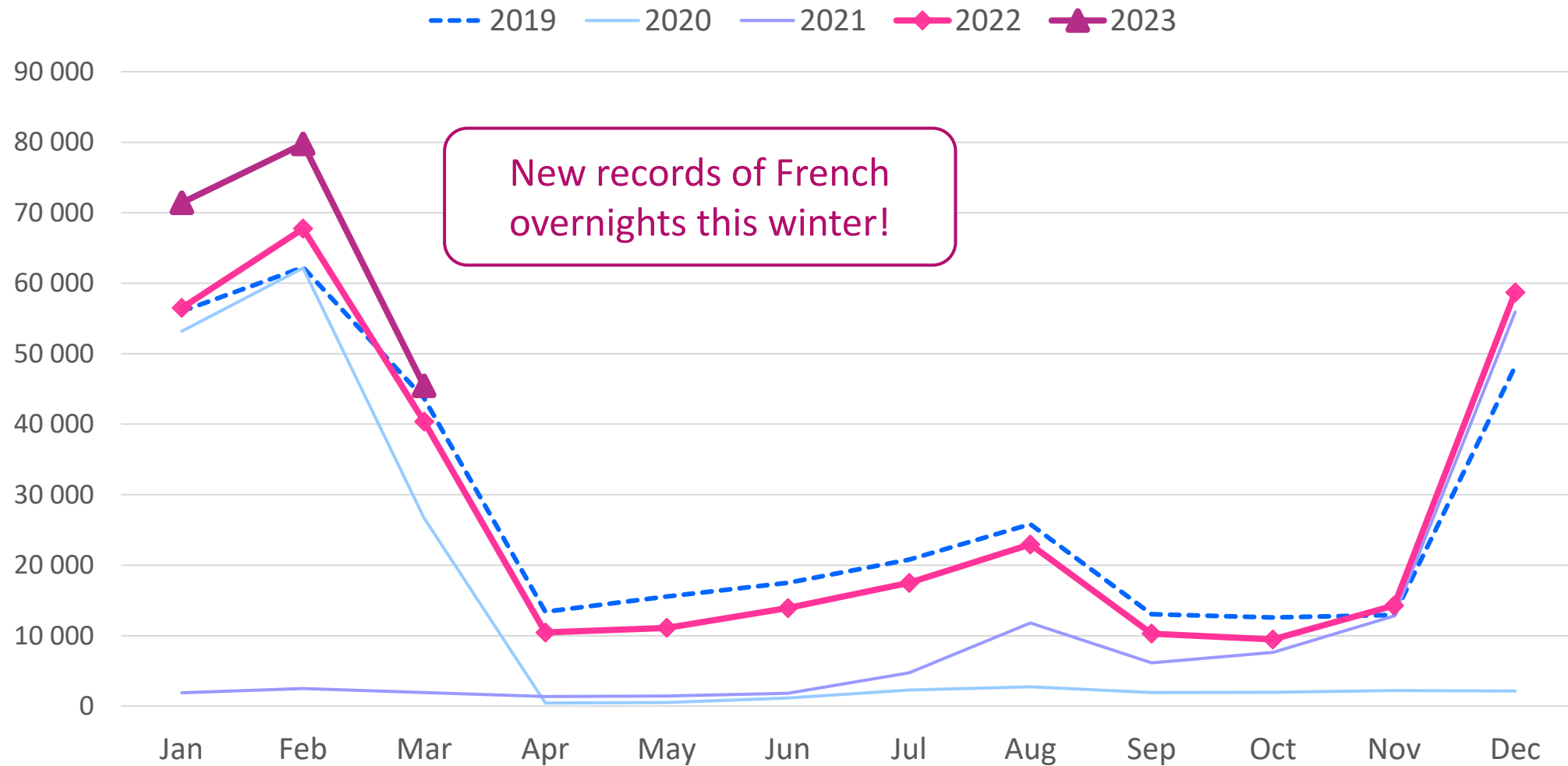
French overnights in main marketing areas  
Year 2022 & change-% vs. 2019



# France – Seasonal Overnights in Finland 2012-2022



# French monthly overnights in Finland 2019-2023

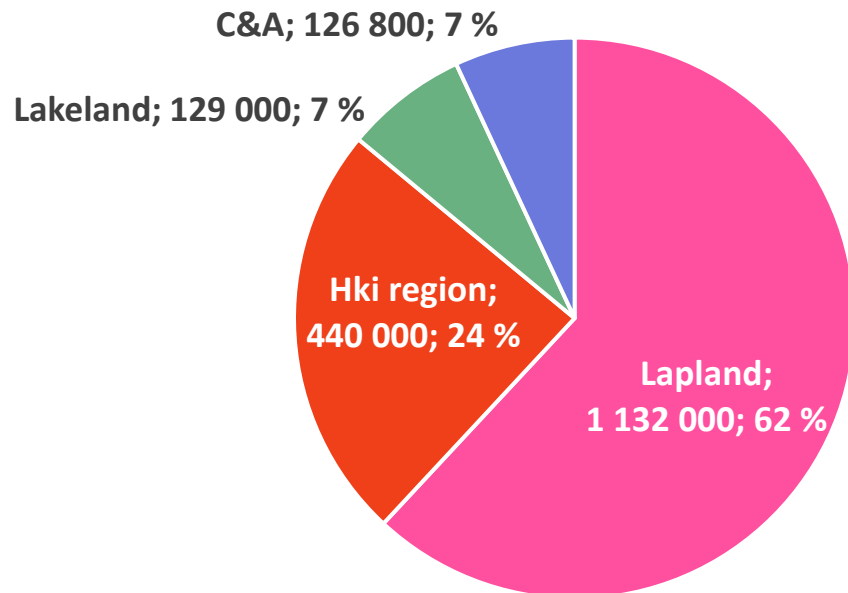


# Foreign overnights in high winter season 2022-2023

And change compared to pre-pandemic

**1.8 M** foreign overnights  
(-12% vs. winter2019)

- **1.3 M** from EU-27 + UK (+15%)
- **186,000** from Asia (-46%)
- **88,000** from America (+21%)



## High winter season (12-02)

	Dec2018- Feb2019	Dec2022- Feb2023	Change 2023 vs. 2019
United Kingdom	334 900	<b>341 100</b>	<b>+2%</b>
France	161 700	<b>209 900</b>	<b>+30%</b>
Germany	151 300	<b>180 700</b>	<b>+19%</b>
Netherlands	106 700	<b>131 200</b>	<b>+23%</b>
USA	53 800	<b>64 700</b>	<b>+20%</b>
Sweden	75 100	<b>63 600</b>	<b>-15%</b>
Spain	59 400	<b>63 100</b>	<b>+6%</b>
Italy	42 900	<b>59 900</b>	<b>+40%</b>
Estonia	58 200	<b>59 600</b>	<b>+2%</b>
Belgium	30 300	<b>51 100</b>	<b>+69%</b>
Switzerland	51 800	<b>48 600</b>	<b>-6%</b>
China & Hong Kong	139 700	<b>33 200</b>	<b>-76%</b>
Singapore	35 300	<b>31 400</b>	<b>-11%</b>
Ireland	14 900	<b>28 600</b>	<b>+92%</b>
Australia	32 600	<b>26 000</b>	<b>-20%</b>
Denmark	21 200	<b>24 300</b>	<b>+14%</b>



# Forward Keys – Flight Bookings and Capacity Data



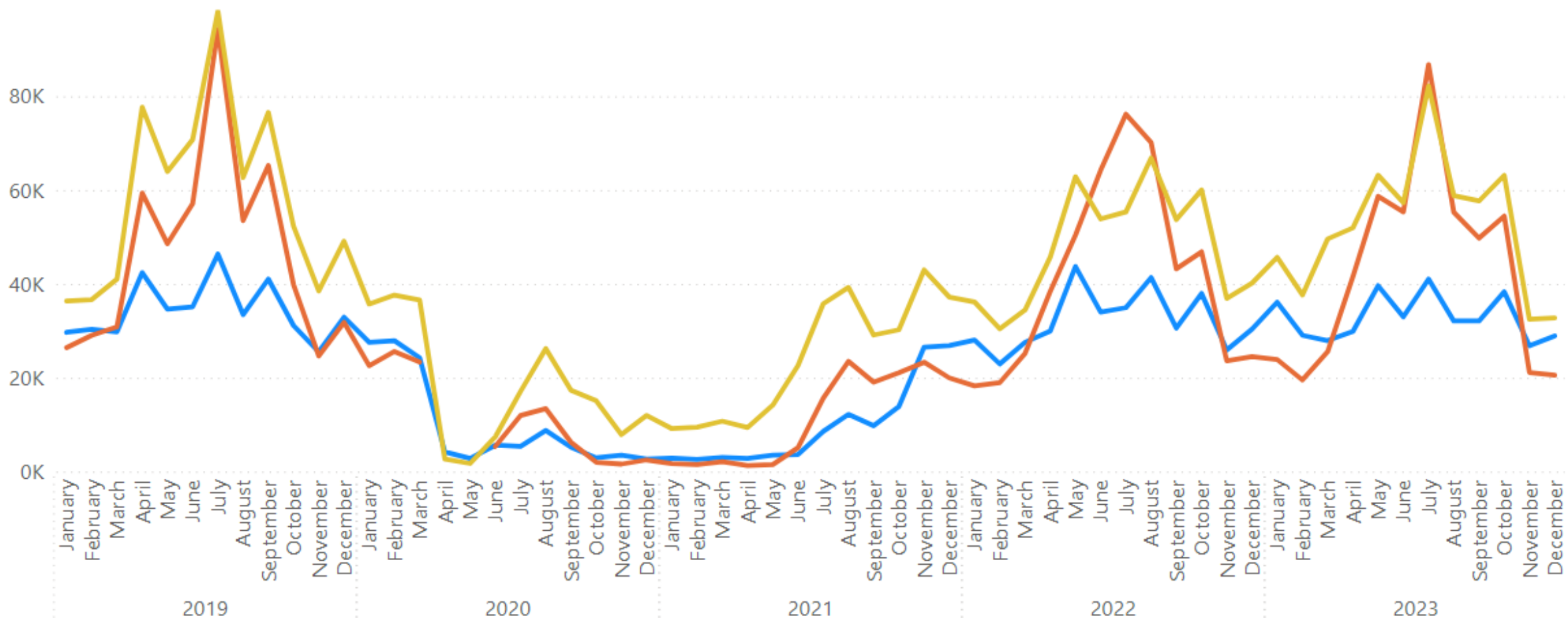
ForwardKeys

# Seat capacity

# Monthly seat capacity from France to FIN, SWE, NOR 2019-2023

TOTAL SEAT CAPACITY  
DESTINATION COUNTRY: ● FI ● NO ● SE

From France



# Seat capacity from France to Finland / Apr-Sep 2023

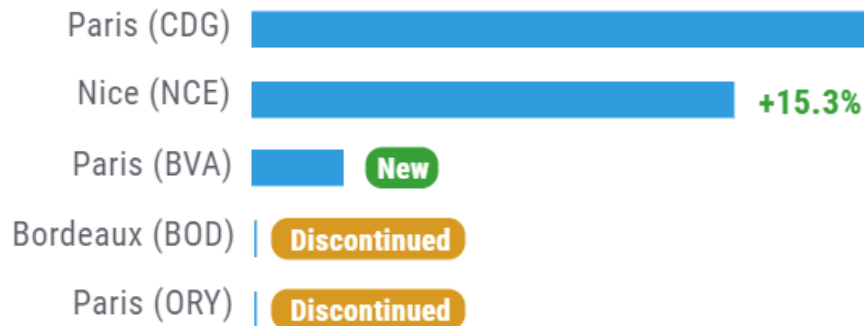
Comparison to pre-pandemic

✈ France (excl. domestic) → Finland **Pre-pandemic analysis**

Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

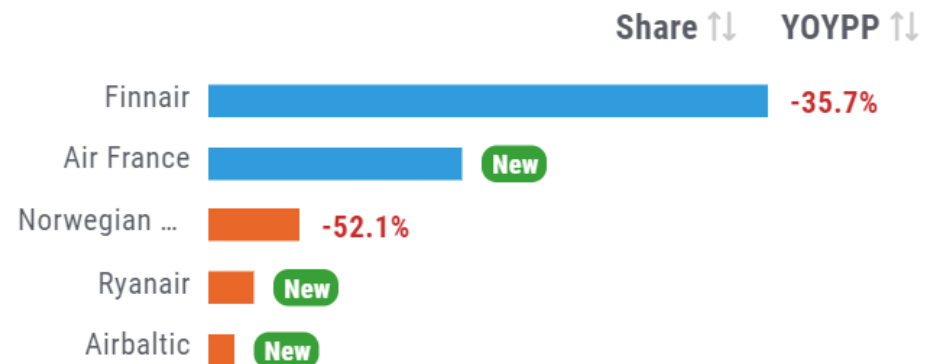
4 airports **-8.0%** YOYPP for selected locations

Seat capacity from France to Finland will be **8% below** the pre-pandemic during spring-summer 2023



**-8.0%** YOYPP for selected airlines

- Finnair is flying three times a day and Air France twice a day from CDG to HEL
- Finnair has 6 weekly flights and Norwegian 4 weekly flights from NCE to HEL
- Air Baltic flies twice a week from NCE to TMP
- Ryanair has 2 weekly flights from BVA to HEL





ForwardKeys

# Flight arrivals/bookings

# Change in flight bookings\* for Jun-Aug 2023 compared to summer pre-pandemic

\*change in flight bookings for Jun-Aug → data update 12.3.

→ 2.4.

→ 23.4.

**Total int'l**  
summer 2023 vs. 2019



**June-August**

**107,700**

No. of flight tickets\*

**Germany**



**18,800**

**USA**



**13,100**

**UK**



**9,500**

**Switzerland**



**8,100**

**France**



**6,900**

**Netherlands**



**4,900**

**Italy**



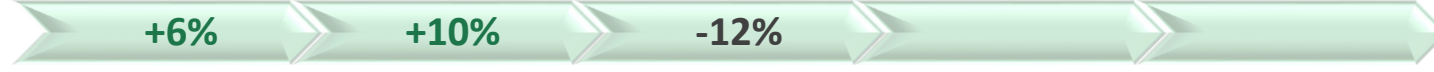
**4,100**

**Spain**



**4,000**

**Sweden**



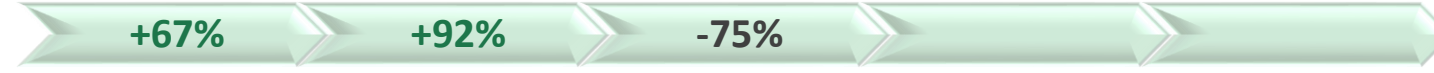
**2,800**

**Japan**



**2,000**

**Hong Kong**



**700**

Please note! Ryanair, EasyJet and most of the charter flight bookings are not included in the booking data and this needs to be taken into account when comparing the markets.



# Change in flight arrivals/booking from France

## Comparison to pre-pandemic

- Travel from France to Finland recovered this winter and summer bookings seem to continue the positive trend.
- Also Sweden and Norway seem to be recovering during the summer and autumn.

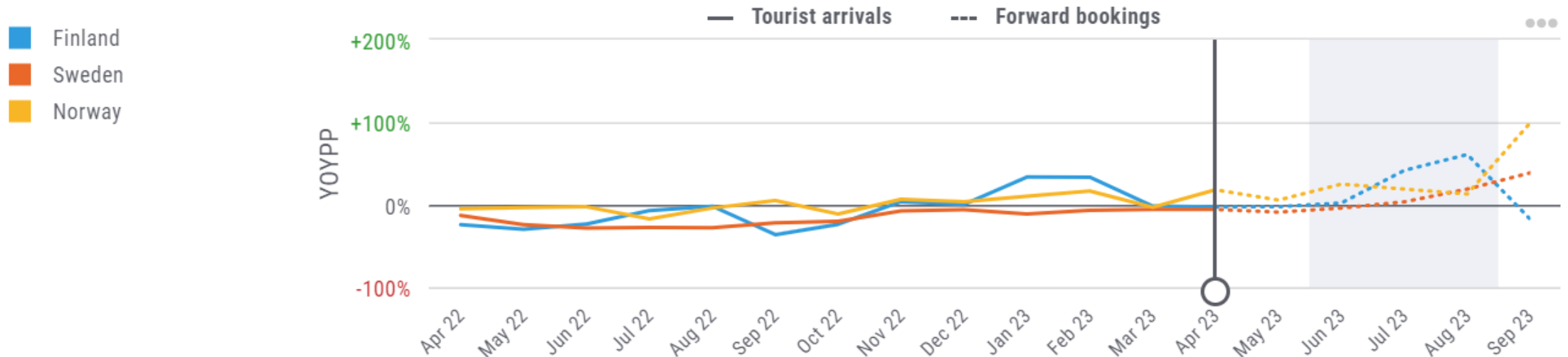
### Destination benchmark

YOYPP of tourist arrivals

Data updated 23-Apr

France - Change in arrivals / bookings vs. pre-pandemic

#### Tourist arrivals to my competing destinations



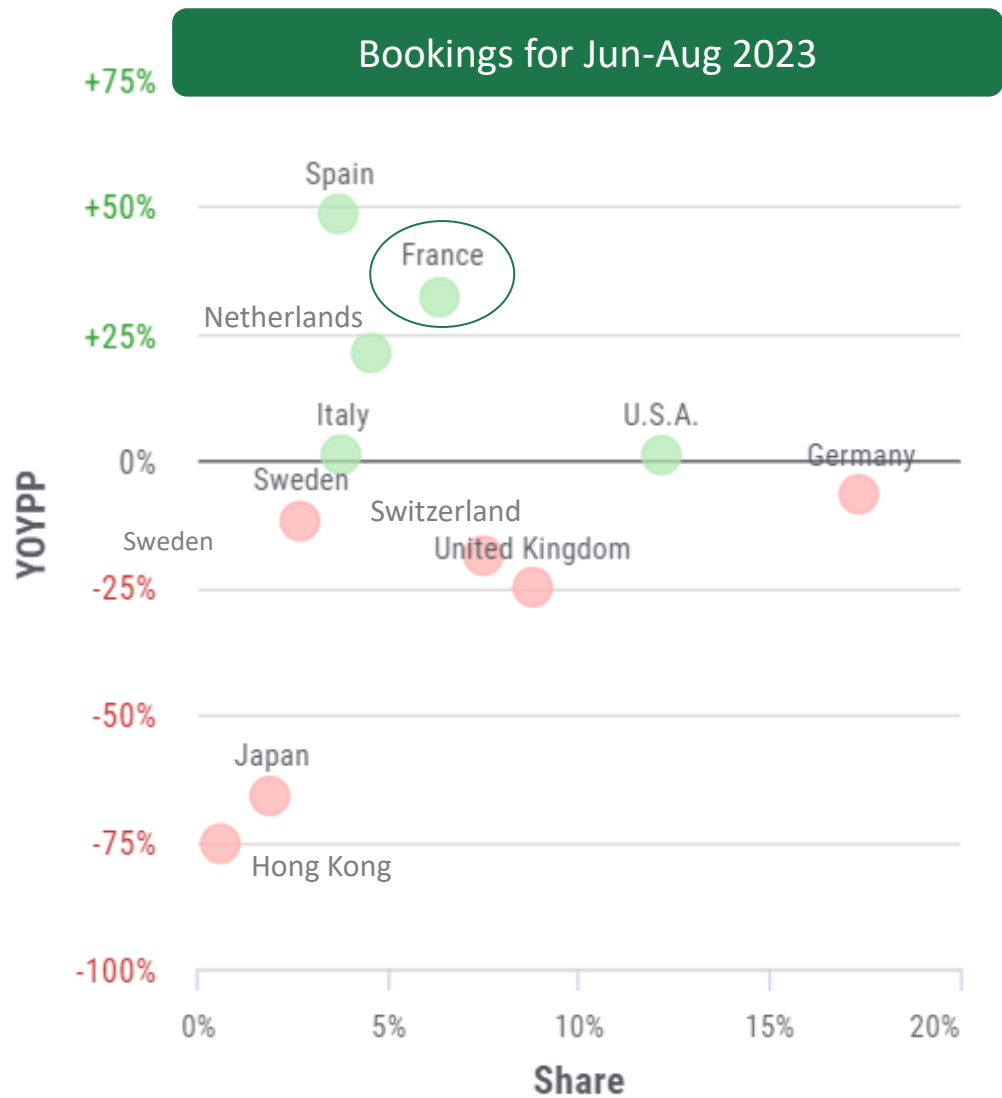
Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.  
Most of the charter flights also missing.

Source: ForwardKeys Destination Gateway

# Flight bookings for summer 2023 (Jun-Aug)

Comparison with pre-pandemic



Very positive outlook for the coming summer months from France to the Nordic region!

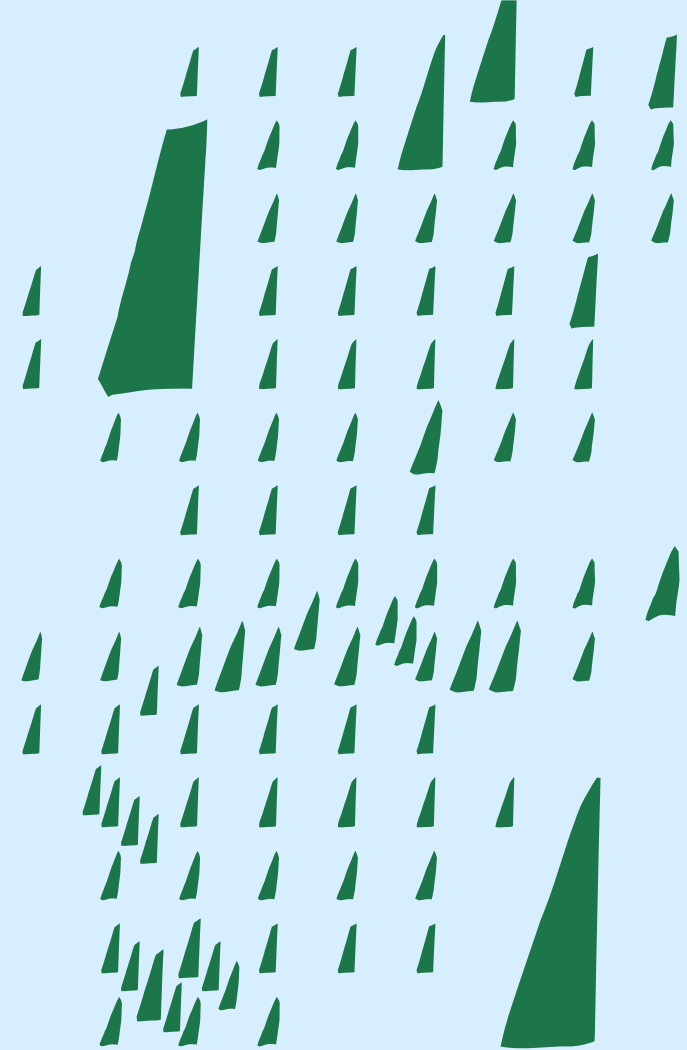
## France - Bookings for Jun-Aug 2023

	June	July	August	Jun-Aug
Finland	1,900	2,900	2,100	6,900
Sweden	4,000	4,400	3,100	11,500
Norway	5,000	6,400	4,800	16,200
	June	July	August	Jun-Aug
Finland	+2%	+42%	+61%	+32%
Sweden	-4%	+4%	+19%	+4%
Norway	+25%	+19%	+13%	+19%

Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.

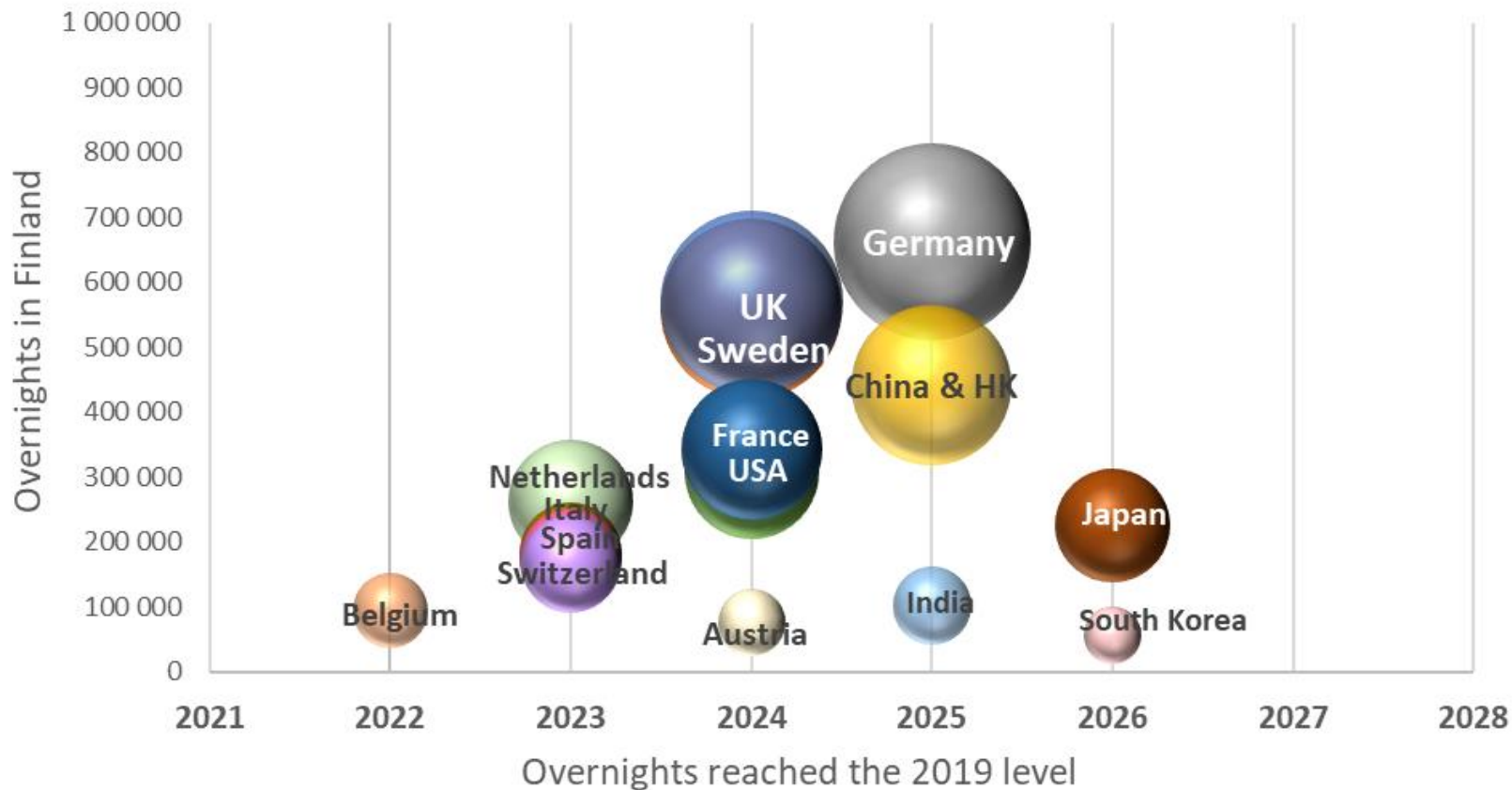
# Oxford Economics forecast for Travel Recovery



# Overnights – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Overnights in Finland reached the level of 2019



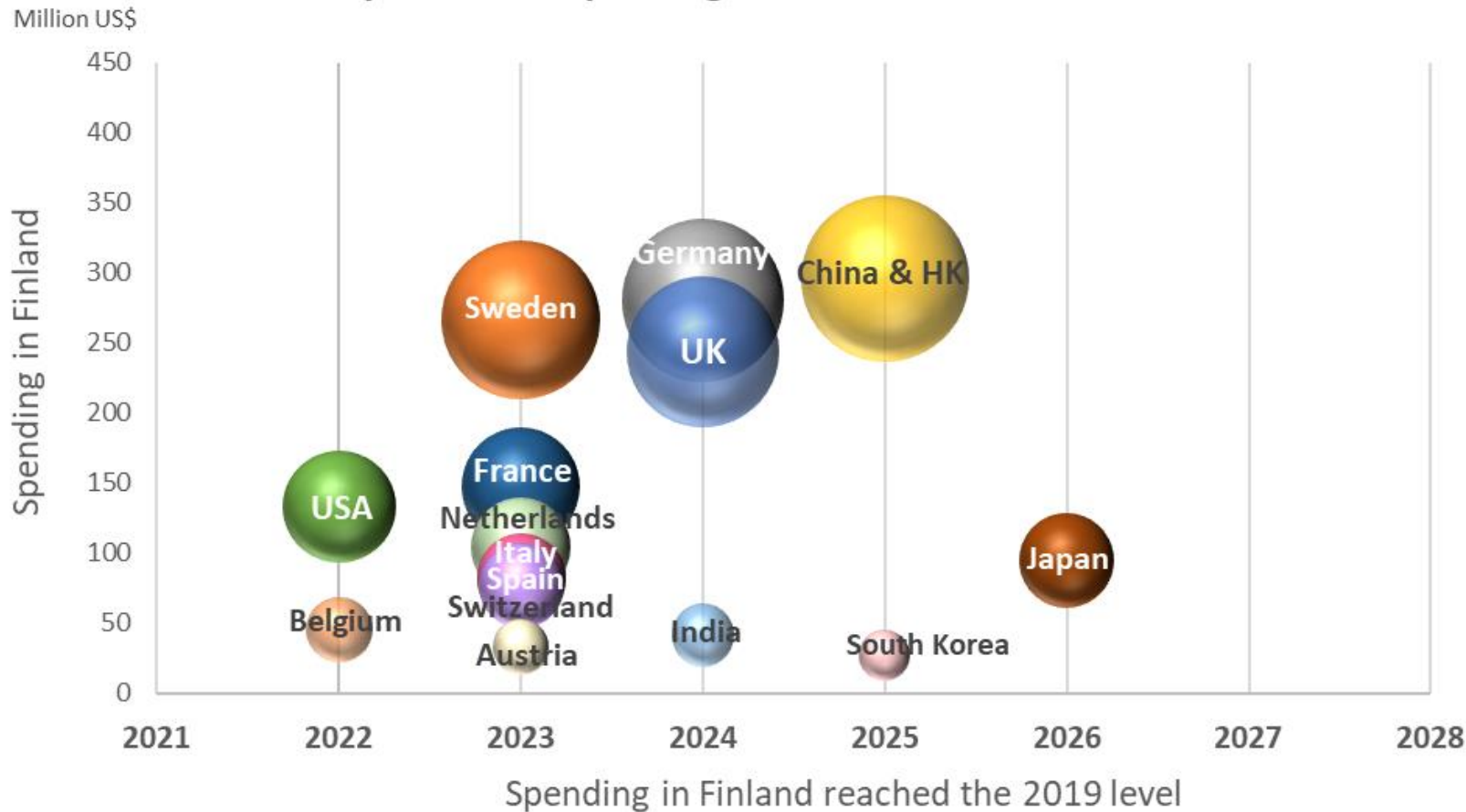
Source: Oxford Economics, databank update Mar 27, 2023

	No. of overnights in 2023	comp. to 2019
Germany	546 200	-17 %
Sweden	523 300	-6 %
UK	503 100	-12 %
France	329 900	-3 %
Netherlands	298 100	14 %
USA	290 400	-6 %
Italy	193 800	7 %
Spain	193 700	11 %
Russia*	180 200	-78 %
China	174 200	-61 %
Switzerland	167 700	1 %
Belgium	122 200	30 %
Japan	91 200	-59 %
Austria	74 000	-3 %
India	71 300	-30 %
South Korea	37 100	-34 %

# Spending – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Spending in Finland reached the level of 2019



Source: Oxford Economics, databank update Mar 27, 2023

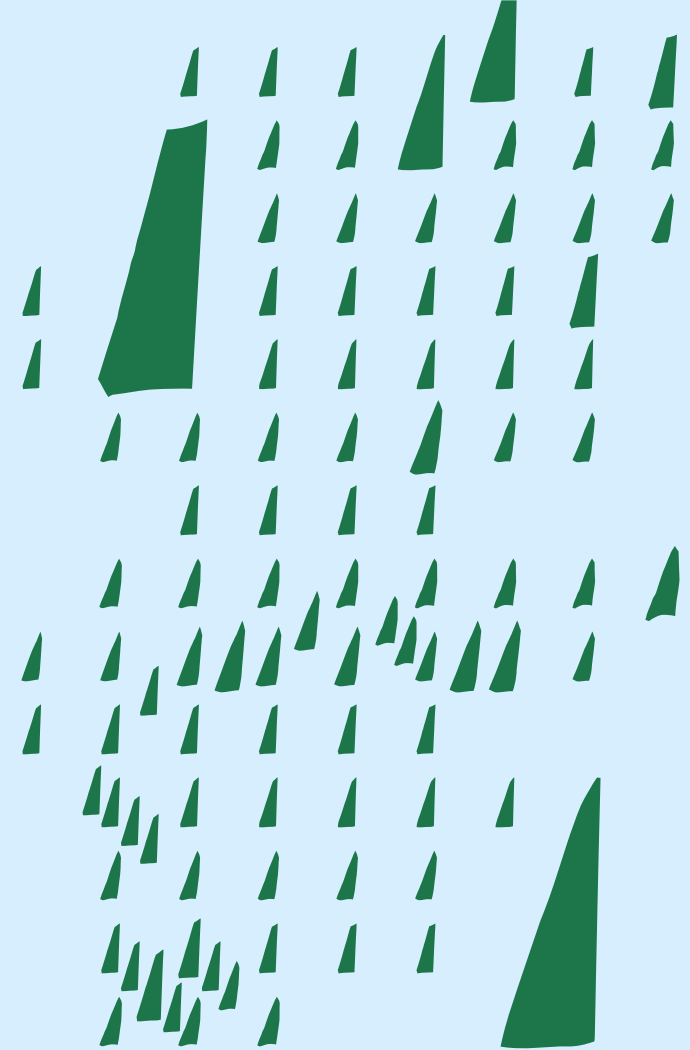
	Spending (Million US\$) in 2023	comp.to 2019
Sweden	260,6	-2 %
Germany	225,2	-20 %
United Kingdom	212,1	-13 %
France	143,6	-2 %
United States**	124,3	-6 %
China	113,3	-62 %
Netherlands	113,3	9 %
Spain	89,6	9 %
Italy	88,8	10 %
Russia	79,2	-79 %
Switzerland	77,3	1 %
Belgium	57,9	28 %
Japan	35,7	-62 %
Austria	32,3	-2 %
India	30,9	-25 %
South Korea	19,4	-26 %

\*\* ) USA will recover to 2019 level in 2022, but will remain slightly below 2019 level in 2023







# Digital Demand



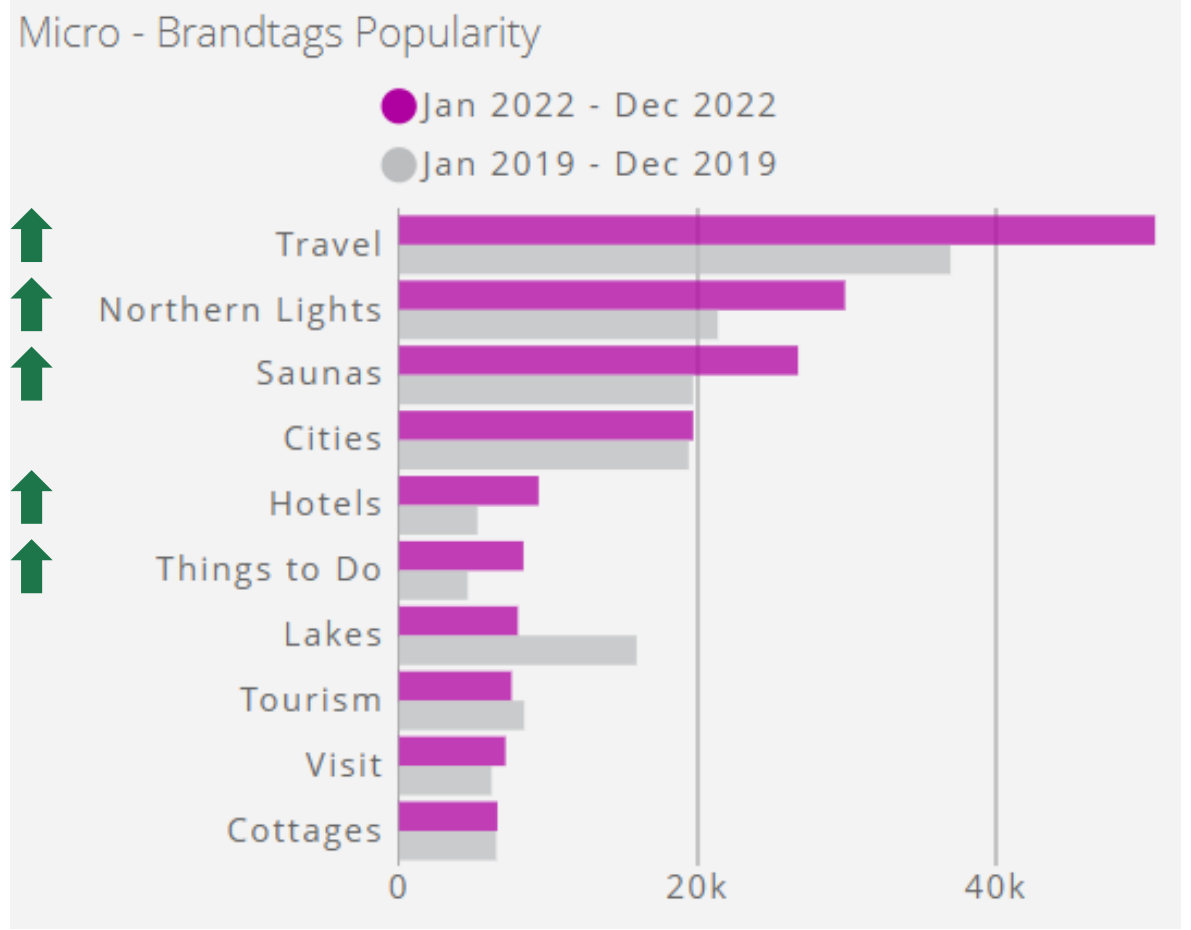
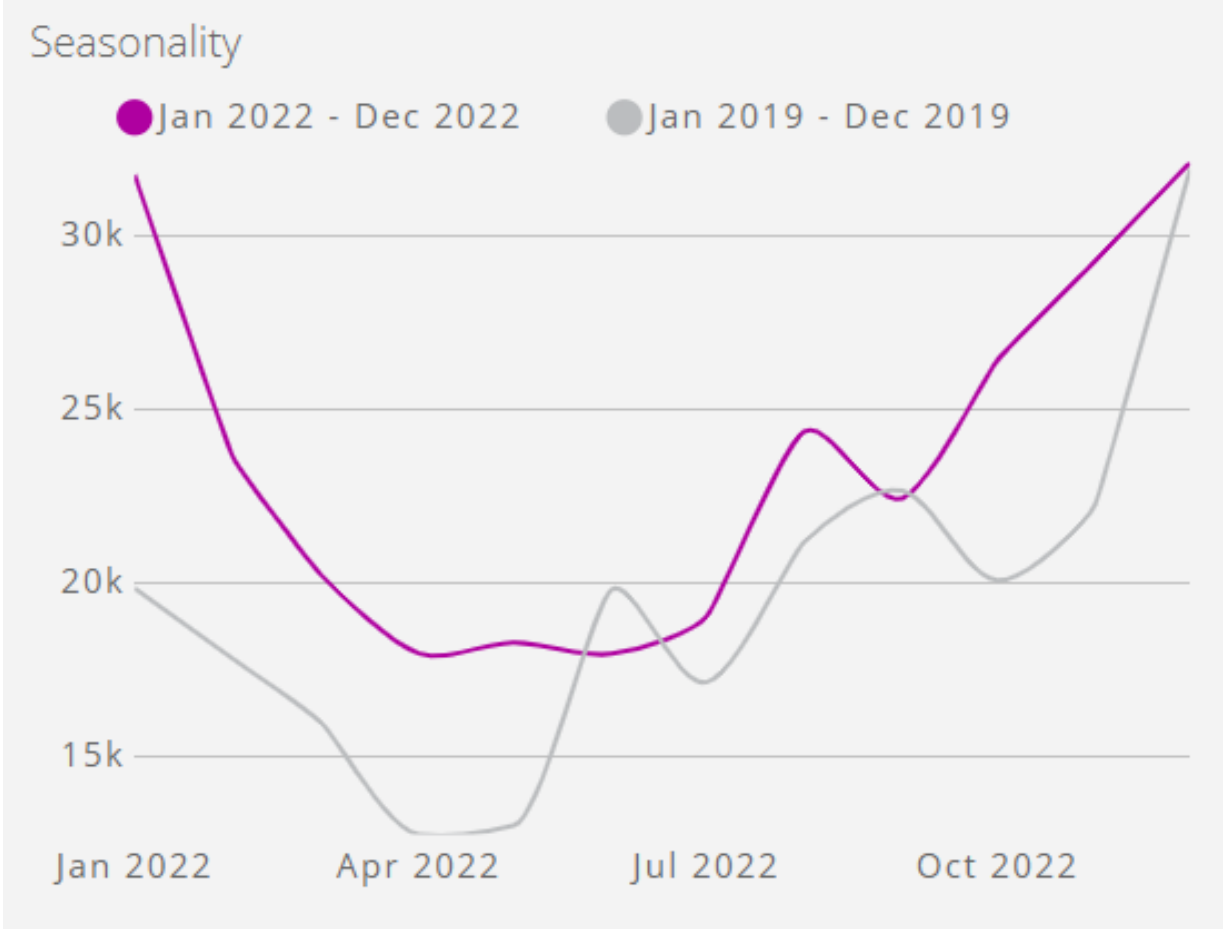
# Travel related internet searches 2022 vs. 2019



# Top Target Markets 2022 vs. 2019

Target Market Distribution				
Rank	Flag	Country	2022 Searches	22/19 Growth
1		Germany	635,793	36.7%
2		Japan	592,326	7.9%
3		United States	590,094	53.8%
4		United Kingdom	382,169	29.2%
5		Italy	285,187	33.4%
6		France	283,549	20.9%
7		Spain	243,895	30.5%
8		Estonia	175,015	66.0%
9		Netherlands	166,802	38.1%
10		India	164,824	30.7%

# France: Seasonality of searches 2022 vs. 2019 & Main topics in 2022



# Travel trends in French market

# Travel trends

## France

- Strong willingness and **need to travel** – “Less, but better”
- Demand for **travelling abroad** is strong; European destinations are popular for the moment
- **Nature and outdoor activities** combined with culture and local lifestyle discovery
- French are looking for destinations with **room to roam** and nature experiences.
- **Safety** is still one of the main criteria; Finland has a good image as a nature destination where you can have room to roam and clean air and nature
- **Traditional travel agencies and tour operators** have still a strong role in purchasing phase as they can have certain insurances and guarantees.
- **Flexibility** & Demand for personal service and tailor-made products
- Slow tourism & **Sustainable tourism**
- **Wellbeing** during holidays
- **Bleisure** travel



Source: Le Routard

# Travel trends in France

## France

*What are the French travellers looking for ?*

- French appreciate **good service**
- **Food**; local specialties and curiosities.
- Live/Do **like a local experiences**
  - Authentic experiences & destinations
- **Learnings** during holidays; discovery
- **Out of a common experiences**
- **Authentic accommodation**
- French consumers/travellers are looking for inspiration and information in many different online channels and in social media – **online presence and visibility** are very important!



# Market updates/outlook in French market

# Market Update

## France

- Very **good winter season**, France was 4th market in overnights in 2022, and 2<sup>nd</sup> in winter season 22-23
- Strong demand for winter products in Lapland, but also new development in Arctic Lakeland region
- Finland has the **strongest position as a winter destination** among Nordic countries and long winter season (DEC-MAR)
- **Good accessibility**
  - Direct flights Paris - Helsinki all seasons (Finnair, Air France, Ryanair)
  - Direct flights Paris - Rovaniemi & Paris – Kittilä during winter season (Air France)
  - Direct flights Nice - Helsinki (Finnair, Norwegian) and Nice - Tampere during summer season (Air Baltic)
  - Many charter flights to Rovaniemi, Kittilä & Ivalo during the winter season
- Coming summer season looks good
  - **Lots of potential (demand)** for new summer products for different target groups (families and outdoor travellers)
  - Need for visibility on different products & “Things to do in summer” – Image promotion
  - Availability of products and services in August / September

# Market Update

## France

- Competition is harder concerning summer season as French are travelling a lot inside France during the summer and Norway has a strong position and image as a Nordic summer destination
- As the summer weather in Southern Europe is getting warmer and warmer, French travellers are also looking for cooler summer destinations
- Role of the incoming agencies and need for French speaking guiding services

### Main tour operators:

- Kuoni-Scanditours, Timetours/ La Francaise de circuits, Vivatours, Fram /Karavel, NG travel, 66 Nord, Salaun Holidays/Nordiska, Scandinavia/Hutissen, Comptoir des Pays Scandinaves and Voyageurs du monde.
- There are also many smaller, and specialised operators, selling actively Finland.



# Activities 2023

# B2B activities

## Sales Events in 2023

- Nordic Workshop in Paris 21.3.2023
- Pure Events & Meetings, 16.3.2023
- Road show events with Tour operator partners (Kuoni-Scanditours, Timetours, NG Travel 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
- Air Baltic event in Nice



## NORDIC WORKSHOP




https://lacollection.airfrance.fr/fr-FR/merch?code=OTFINLANDEMAI23&preview

Front page – Home Imported User account | Fut... SkyFiles Visit Finlandin asi... My Activities Das... https://finpro.shar... VF Pulse-202209... Energianationalis... Other Bookmarks


AIRFRANCE la collection

TOUTES LES VENTES MON COMPTE



Visit Finland

ACCÉDER AUX OFFRES



**Les couleurs de la Finlande**


À la recherche d'un city-trip ou d'une escapade en pleine nature, ou un peu des deux ? Vous trouverez sans aucun doute votre bonheur en Finlande. Les Finlandais s'affichent régulièrement comme l'un des peuples les plus heureux du monde, et la beauté et la quiétude des paysages ne sont sans doute par pour rien dans ce ressenti. Vous pourrez vous aussi profiter de la beauté des lieux, que ce soit en hiver ou en été, l'ambiance est à la quiétude, même si le

INSCRIVEZ VOTRE CARTE AIR FRANCE KLM - AMEX ET PROFITEZ DE 400€ REMBOURSÉS SUR VOTRE PROCHAIN SEJOUR\*

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VisitFinland.com



**FINLANDE**  
Èté grandeur nature

Pour la 6<sup>e</sup> année consécutive du World Happiness Report, la Finlande est en tête des pays les plus heureux du monde.

Sa recette du succès ? La communion totale de ses habitants avec la Nature. De grands espaces, des forêts boréales et des étendues aquatiques se succèdent à perte de vue dans ses quatre régions principales (Helsinki, les Grands Lacs, Laponie et sa côte).

Nichés au creux de sa végétation, de petits villages au charme incomparable et des monuments historiques classés à l'UNESCO découvrent leurs murs de pierre ou leurs toits de bois.

En été, le soleil ne s'y couche jamais. Vous aurez donc toute la journée pour profiter des merveilles finlandaises, admirer le soleil scintillant à minuit, et célébrer le retour des beaux jours aux côtés d'un peuple exalté. Une expérience unique, empreinte d'un charme envoûtant.





# 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 & Generation Voyage Summer cooperation



Go Nordic!  
Les pays nordiques



# PR & Media in France



# What exactly do we do in France right now?

In constant active cooperation with our PR agency in Paris, we perform following PR and media activities:

Distribution of international and market specific press releases

Proactive regular pitching to French national and regional media ( print, online, social )

Media visits ( international group visits, national group visits, individual visits )

for both media and social media influencers

In addition to activities mentioned above, we are currently working on various

PR activities focused on promotion of "Find your inner Finn" campaign – large scale international image campaign by Visit Finland.

Most relevant themes rising interest among French media currently:

Sauna, happiness, gastronomy, culture, outdoor

# France coverage highlights - 2023 so far

Le Monde



LE GOÛT DU MONDE • VOYAGER EN EUROPE

## En Finlande, le froid chaleureux de Tampere

# LE FIGARO

« Sans la liberté de blâmer, il n'est point d'éloge flatteur. » Beaumarchais

## La Finlande à la recherche de Français en quête de bonheur

Le pays des mille lacs

# VANITY FAIR



La Finlande vous offre le séjour pour vous  
apprendre l'art d'être heureux

La Finlande organise une masterclass sur le bonheur pour dix heureux visiteurs. Voilà comment tenter votre chance.



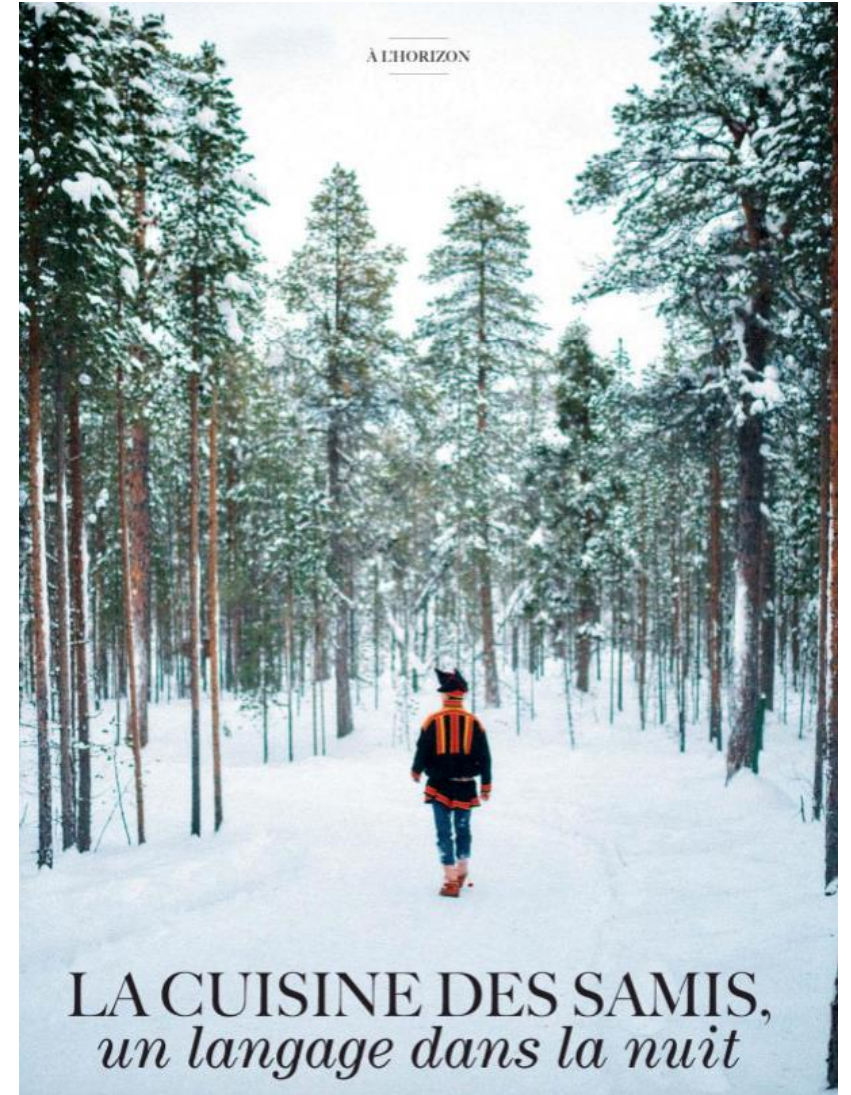
La Finlande ne compte pas un millier de lacs, mais près de 188.000 ! Ici, le lac Kallavesi. *Visit Finland*

**Finlande** . Voilà un chiffre largement sous-estimé. Le pays nordique compte en réalité 188.000 plans d'eau ! Ils se concentrent principalement au sud-est, dans la bien nommée région des Grands Lacs. Qu'importe le nombre, cette périphrase illustre l'attachement des Finlandais à l'élément aquatique qui fait partie intégrante de leur mode de vie. Pêche ou canoë en été, motoneige ou bain d'eau glacée en hiver... Pas pour rien que le pays est désigné comme le plus heureux du monde.



# France coverage highlights - 2023 so far

# GEO



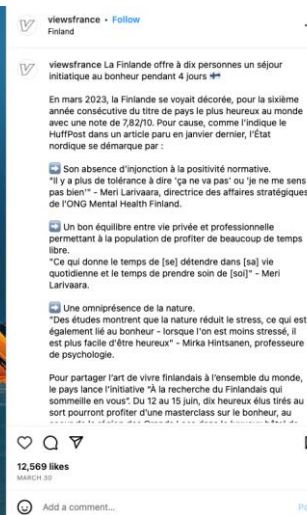
## La Finlande invite une dizaine de personnes à la recherche du bonheur

# GQ

Bien-Être

## Voici pourquoi la Finlande est le pays le plus heureux du monde pour la sixième année consécutive

La liste des pays les plus heureux du monde vient d'être dévoilée par les Nations Unies. La Finlande occupe à nouveau la tête du classement.



# Thank You!

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