

# France market update webinar

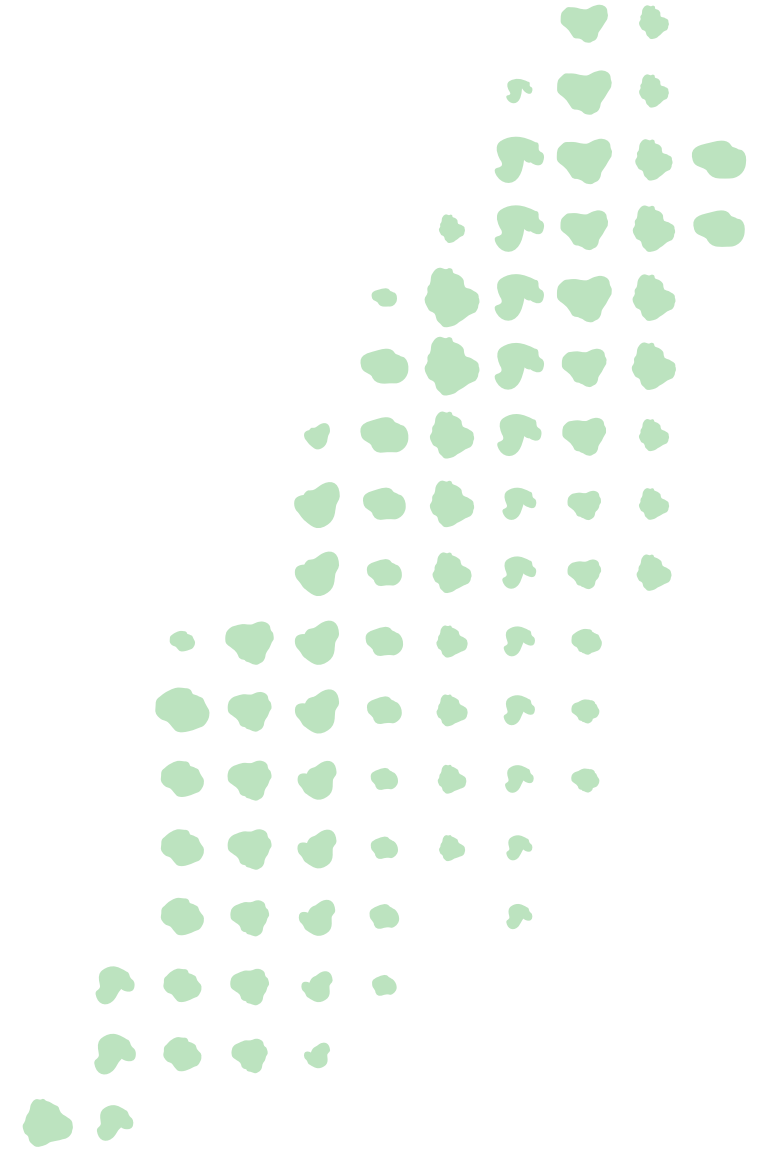


May 2026

Sanna Tuononen & Heli Saari

# Agenda

- **Welcome**
- **France market overview**
- **Market insights**
  - France 2025 statistics
  - Winter season DEC 25 – FEB 26
  - Summer outlook
- **Industry update and consumer trends**
- **2027 planning**



# France market overview

# What's up in France?

- France is **one of Europe's largest** outbound travel markets
- **Strong travel culture** with high international mobility
- **Outbound tourism remains resilient** despite economic and political uncertainty; travel is culturally prioritized by French consumers.

## Key indicators:

- French outbound travel spending reached approximately €57.4 billion in 2025, **up around 4% year-on-year**.
- The market is **highly diversified**:
  - **Leisure** dominates outbound travel
  - **Premium and experiential travel** continue growing (Luxury and affluent travelers remain comparatively resilient)
  - Budget-conscious travelers increasingly seek value-oriented packages and shorter-haul trips

## Economic Factors & Consumer Purchasing Power

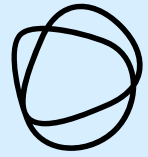
- French households have accumulated **unusually high savings levels** in recent years (due to post-COVID caution, economic uncertainty, political instability) ->resilient travel budgets
- **Inflation and higher living costs** continue to pressure middle-income households
- French travelers are:
  - booking later
  - comparing prices more
  - preference for all-inclusive or predictable-cost travel
  - choosing shorter or closer destinations
- **Airfare & Energy Costs:** Long-haul travel is more exposed to price sensitivity



# What's up in France?

- Geopolitical insecurity
  - Waiting for the summer bookings (bookings late for almost all the destinations)
  - Fear of flight cancellations (happening already with some airlines)
  - Fear of higher flight prices
  - Impact of inflation in travel budgets
  - Train travelling growing
  - Possibility of partial unemployment - waiting answer from government
- Middle East conflict, Regional instability affects:
  - flight routes & fuel prices
  - traveler confidence -> alternative destinations
- Russia–Ukraine War
  - Continues impacting energy prices and European security sentiment
  - Travelers increasingly favor perceived “safe” destinations





Visit Finland

# France – market insights

Year 2025 & Winter high season 2026

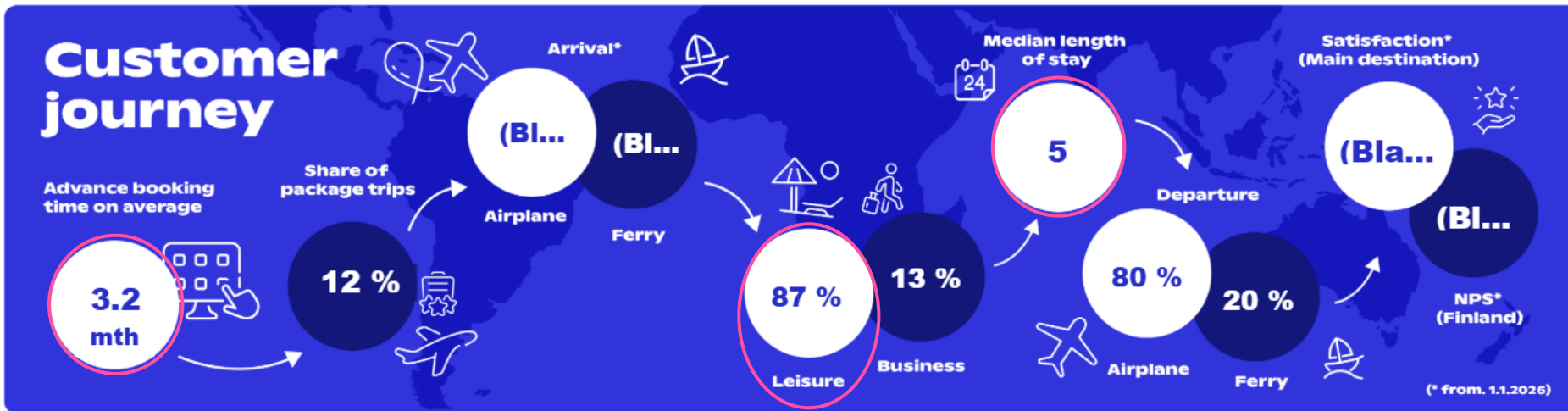
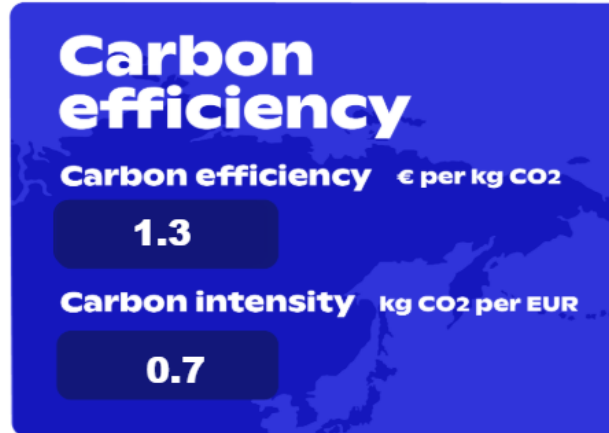
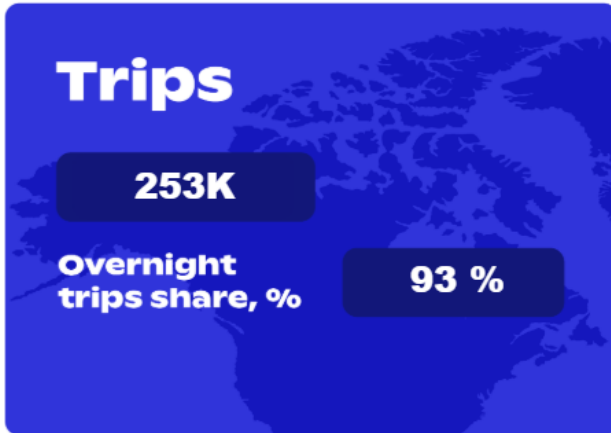
Outlook for the summer 2026

# All French travellers to Finland Year 2025

MatkailijaMittari  
Visit Finland

Year: 2025 | Quarter: All | Month: All | Latest 12 months: All | Start / End date: 01/2025 - 12/2025

Departure region: All | Departure Countr...: France | Travel Destinations: All | Travel Type: All | Travel Purpose: All



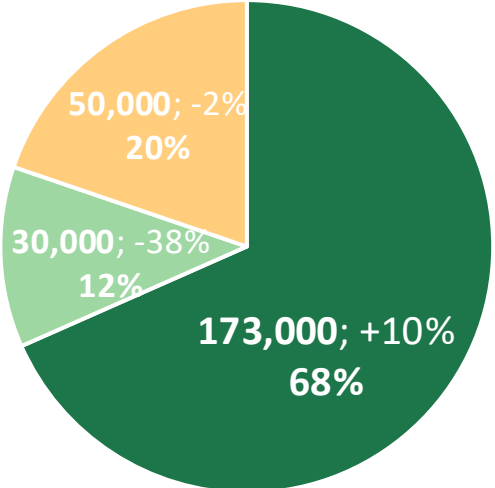
Country	Trips	YoY
Estonia	773,000	-3%
Germany	489,000	+6%
Sweden	468,000	-6%
UK	451,000	+17%
USA	257,000	-10%
<b>France</b>	<b>253,000</b>	<b>-1%</b>
Spain	204,000	+2%
Italy	195,000	+2%
Netherlands	161,000	+30%
Poland	135,000	+14%
Japan	129,000	+75%
China	106,000	+1%

Country	Spend M€	YoY
Germany	369	-2%
Estonia	310	-6%
UK	306	+12%
<b>France</b>	<b>260</b>	<b>+3%</b>
USA	227	-27%
Sweden	182	-5%
Spain	176	+14%
Italy	137	-9%
Netherlands	132	+20%
China	120	-22%
Japan	98	+61%

# French trips & spending by purpose & main destination 2025

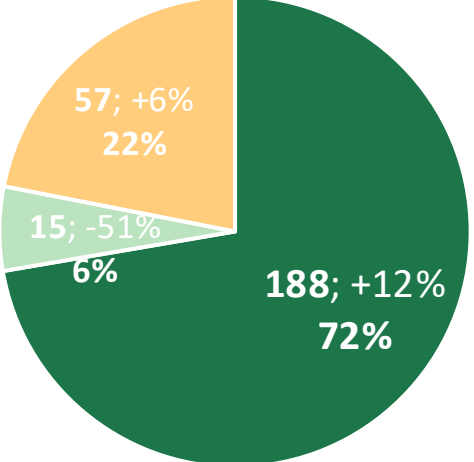
France: Trips to Finland 2025

■ Vacation/recreation ■ Visiting friends/relatives ■ Business, Study



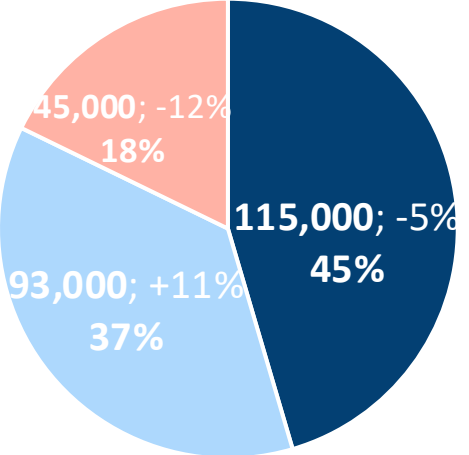
France: Spending (M€) in Finland 2025

■ Vacation/recreation ■ Visiting friends/relatives ■ Business, Study



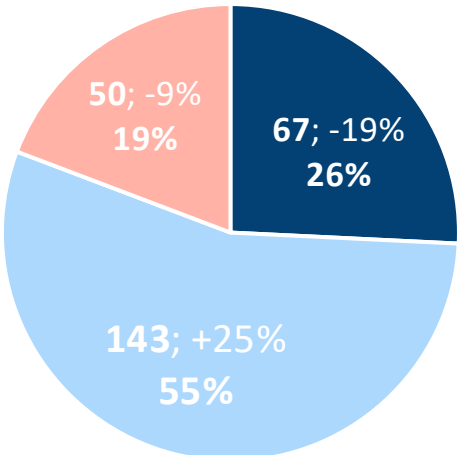
France: Trips to Finland 2025

■ Helsinki & Uusimaa ■ Lapland ■ Other



France: Spending (M€) in Finland 2025

■ Helsinki & Uusimaa ■ Lapland ■ Other



# Vacation/recreation travellers to Finland - Year 2025

French holiday travel to Finland has increased compared to 2024. Similarly, the overall expenditure of French tourists has risen.

Country	Trips	YoY
Germany	297K	+19%
UK	283K	+31%
Estonia	251K	+17%
<b>France</b>	<b>173K</b>	<b>+10%</b>
Sweden	158K	-6%
USA	156K	-9%
Spain	122K	+30%
Italy	122K	-2%
Japan	112K	+77%
Netherlands	88K	+14%
China	75K	+14%
Poland	72K	+47%

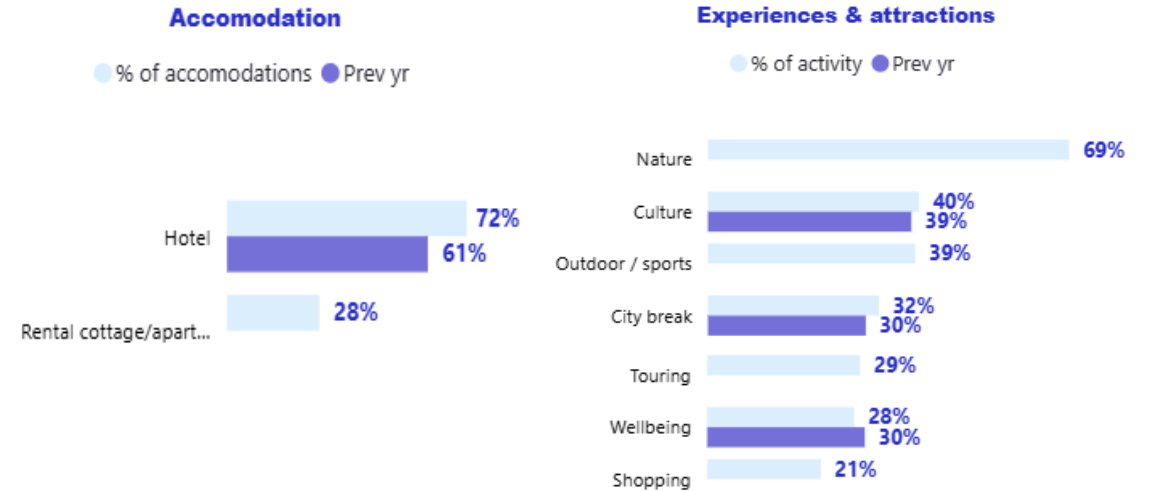
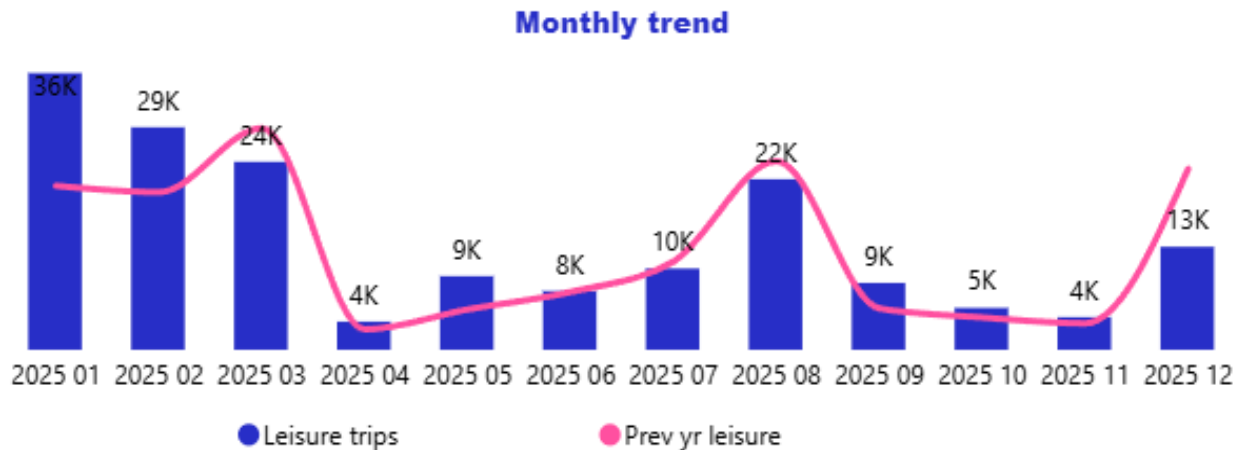
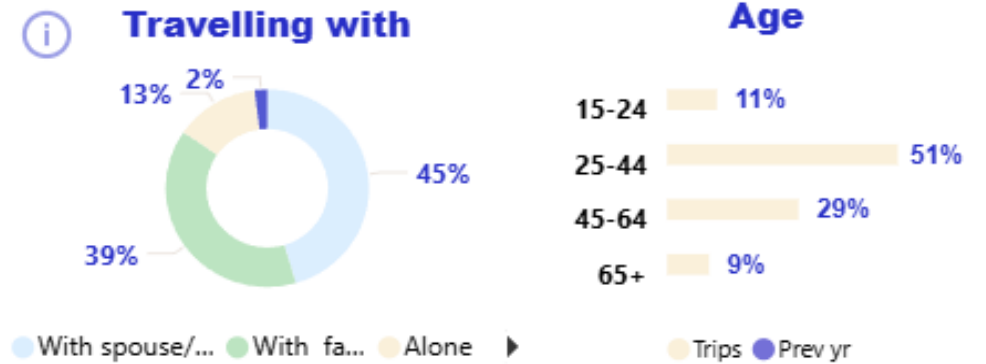
Country	Spend M€	YoY
Germany	246	+15%
UK	217	+30%
<b>France</b>	<b>188</b>	<b>+12%</b>
USA	142	-26%
Spain	99	+36%
Netherlands	92	+18%
Italy	85	-10%
Japan	83	+60%
Estonia	82	+16%
China	70	-12%
Sweden	62	-10%
Switzerland	61	+18%

Country	Spend/trip €	YoY
Switzerland	1,141	0%
Austria	1,127	+46%
Singapore	1,087	+7%
<b>France</b>	<b>1,087</b>	<b>+1%</b>
Netherlands	1,036	+20%
Canada	965	N/A
Australia	946	-23%
China	936	-23%
Belgium	923	+10%
USA	915	-18%
Brazil	874	N/A
India	873	N/A
Germany	829	-4%
Spain	809	+5%
UK	767	-1%
Japan	741	-9%
South Korea	732	-8%

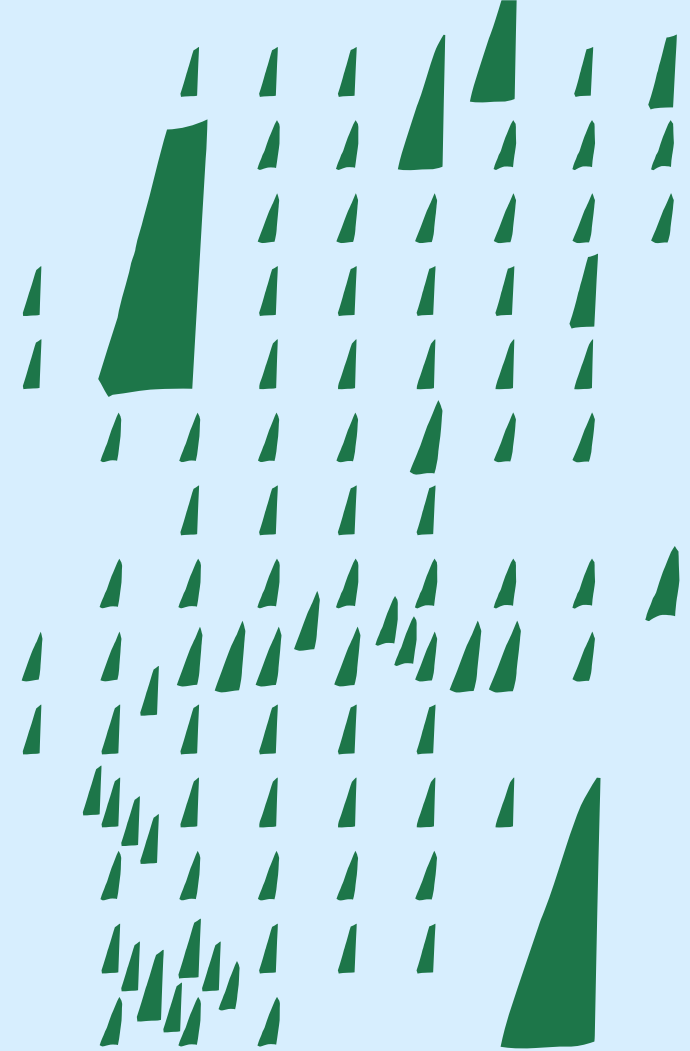
Country	Spend/day €	YoY
Singapore	195	-7%
Canada	179	N/A
China	173	-7%
Japan	173	-4%
Ireland	171	-1%
UK	168	+4%
Austria	168	+31%
Spain	165	+27%
Brazil	155	N/A
Australia	152	-19%
Switzerland	152	0%
<b>France</b>	<b>150</b>	<b>+7%</b>
Netherlands	141	+8%
Italy	135	-13%
USA	134	-13%
Belgium	128	+42%
Germany	124	-10%

# French vacation/recreation travellers to Finland - Year 2025

- Holiday travel from France to Finland increased in **January-February 2025** compared to the previous year.
- 45% of French holiday makers were travelling with **their spouse** and 39% with **family or friends**. Half of the travellers were young adults (age group of 25-44 years).
- Around 70% of the French holiday travellers chose **hotel** and slightly less than 30% **rental cottage / apartment**.
- **Activities in nature** as well as **culture** and **city breaks** were the most popular among the experiences in Finland during the holidays.



# French registered overnights in Finland



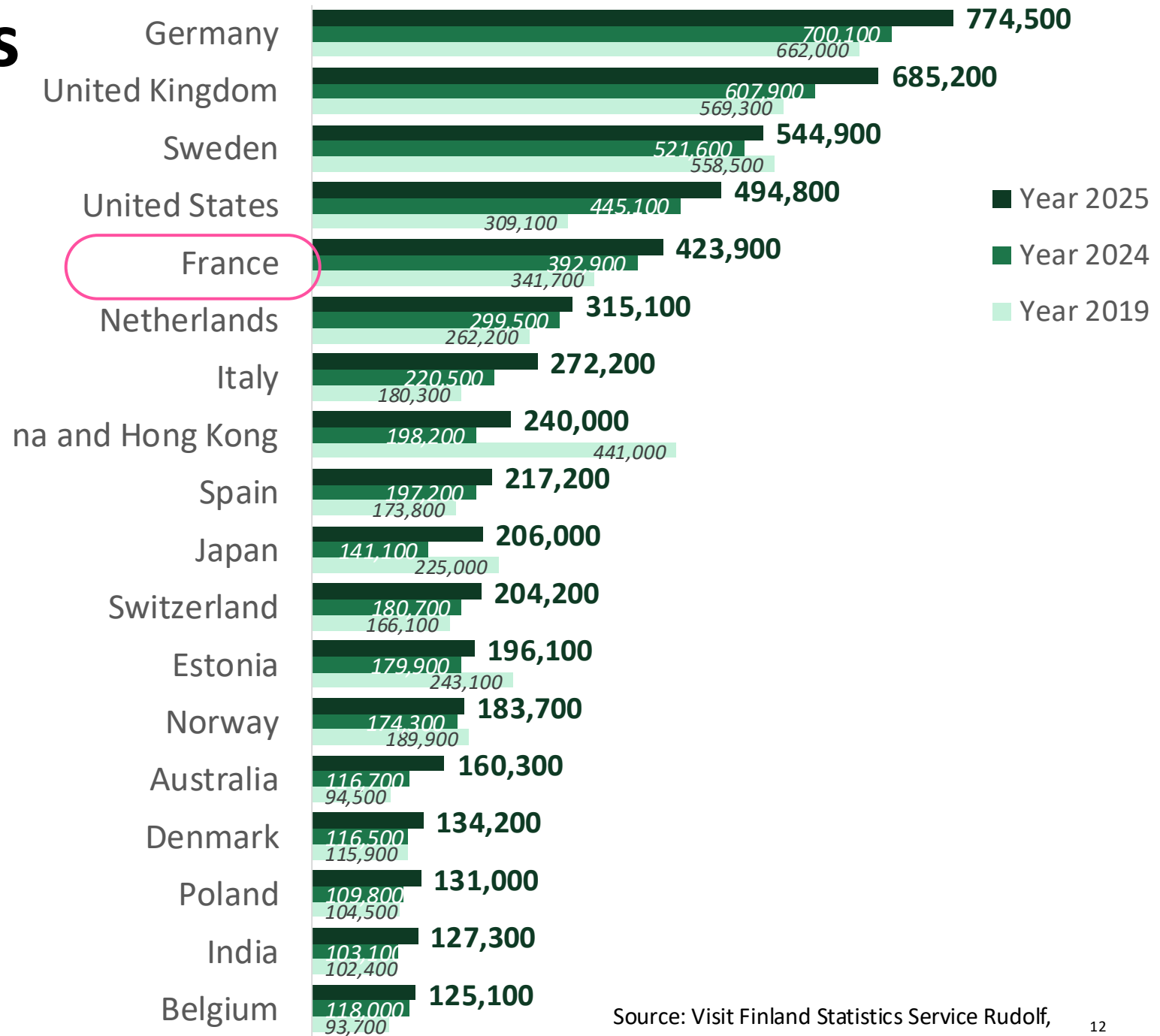
# Main source markets in 2025

**423,900 French**  
registered overnights in 2025  
**+8% vs. 2024 (+24% vs. 2019)**

French registered overnights reached pre-pandemic level already in 2023 and the **growth has continued.**

In addition to the registered overnights, **French travellers are increasingly choosing short-term rentals** for their trips. In 2024, the share of French visitors' short-term rentals was as high as **40% of their total paid accommodation.**

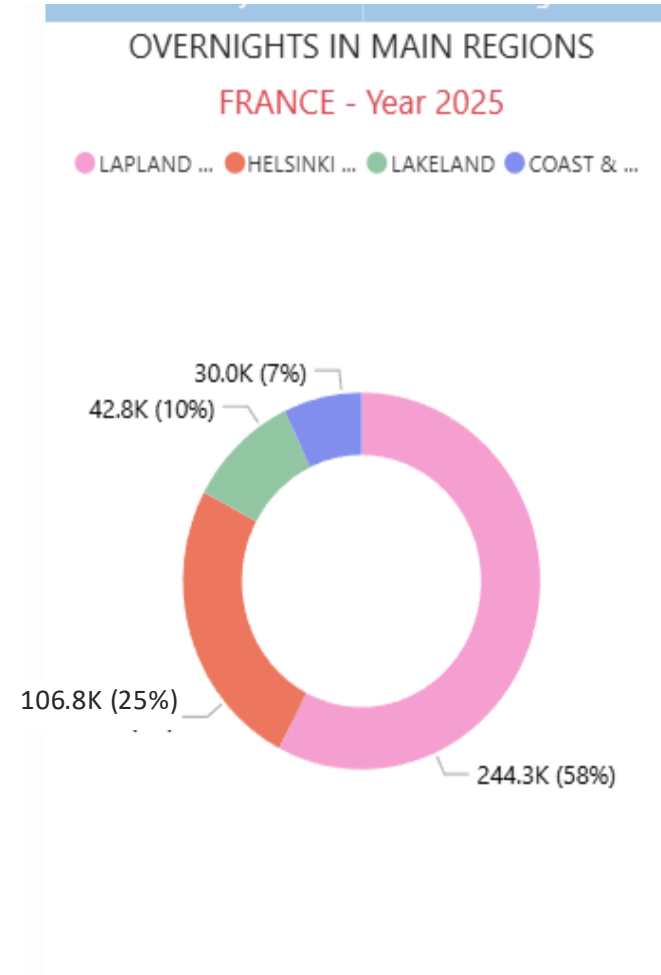
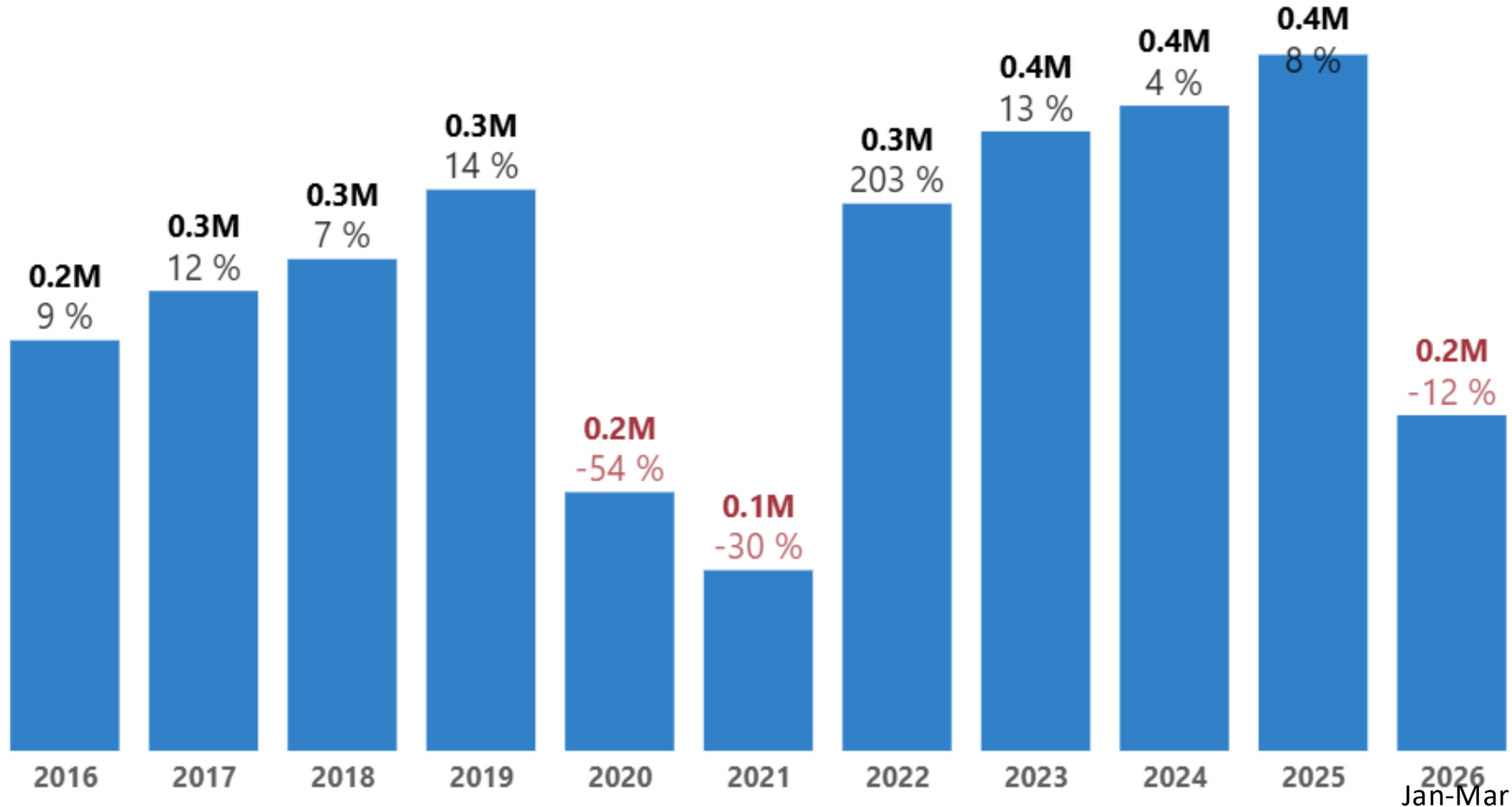
*(statistics for short-term rentals 2025 will be published later this year)*



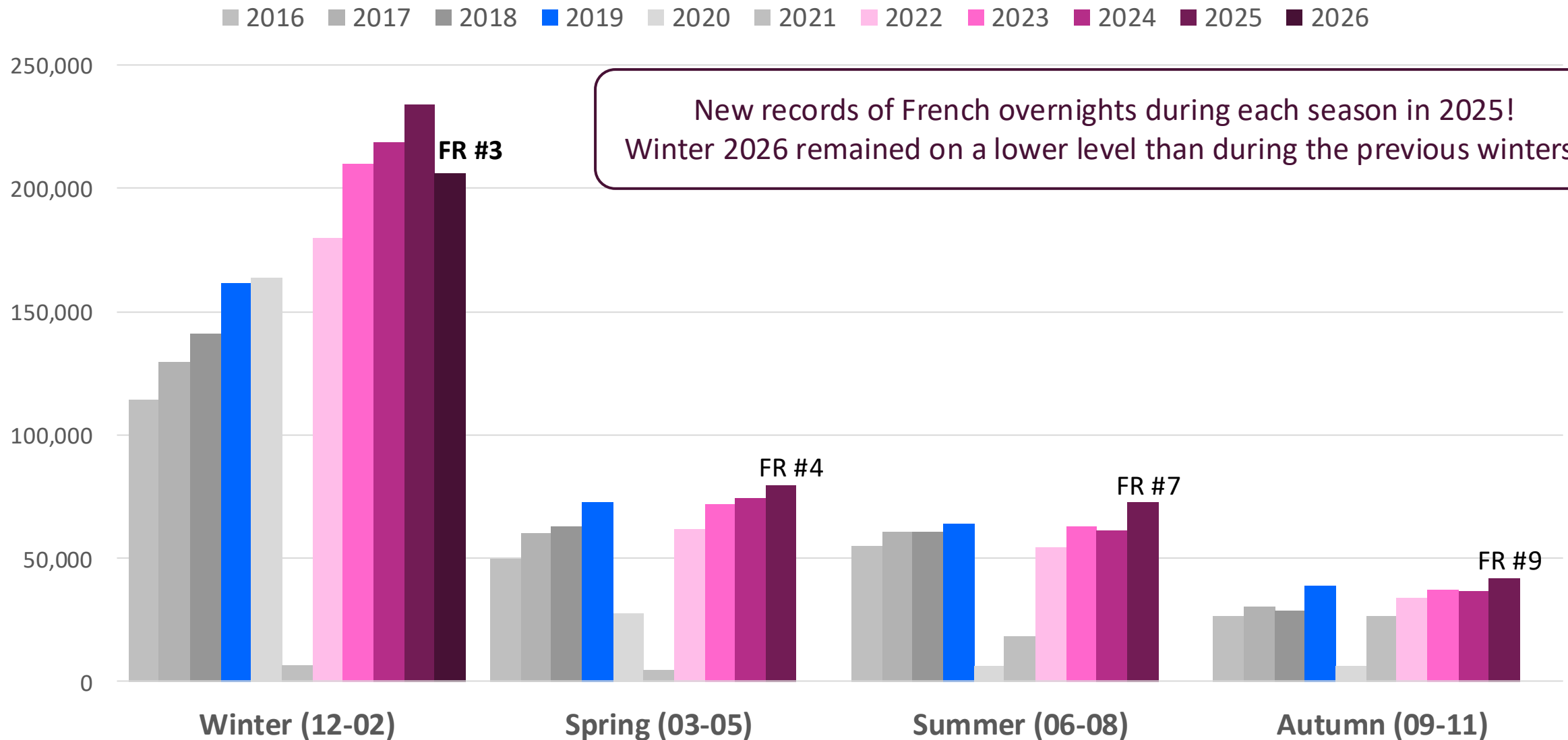
# French overnights in Finland 2016-2025 & Jan-Mar 2026

NO. OF OVERNIGHTS IN FINLAND AND YoY CHANGE %

FRANCE



# France – Seasonal Overnights in Finland 2016-2026

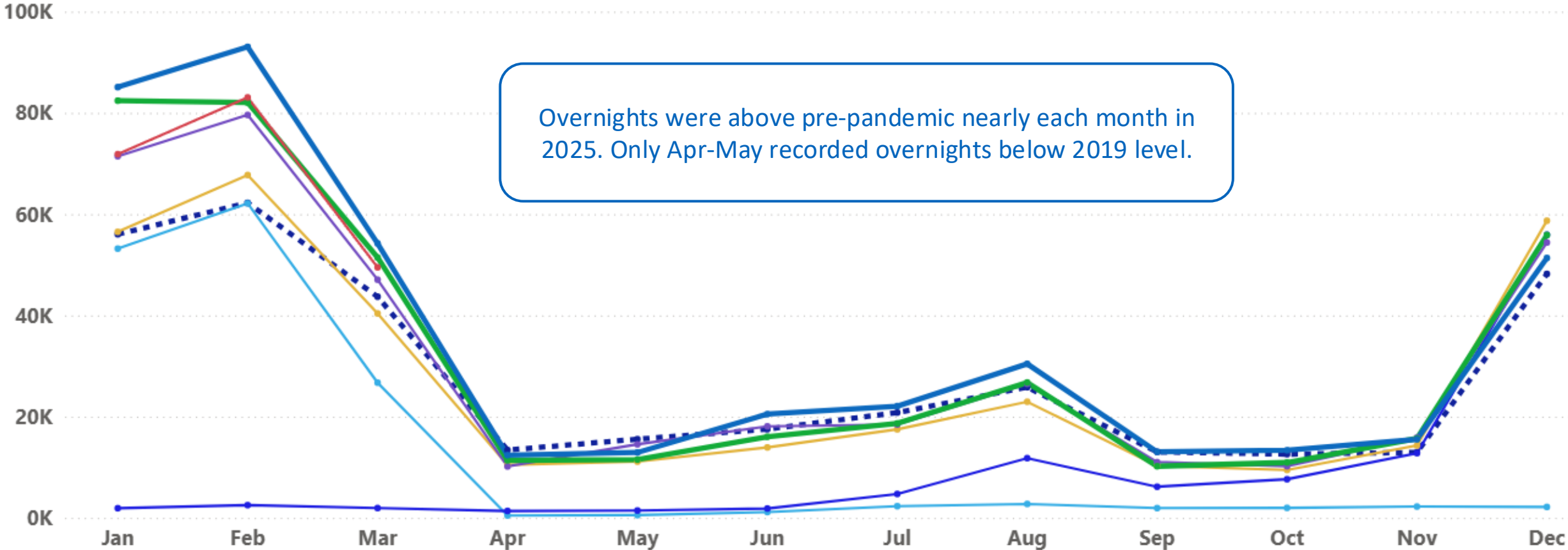


# French monthly overnights in Finland 2019–2025 & Jan-Mar 2026

NO. OVERNIGHTS IN FINLAND BY MONTH

FRANCE

● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025 ● 2026



# Overnights in high summer season 2025

And change compared to summer 2024 & pre-pandemic

## 2.1M foreign overnights

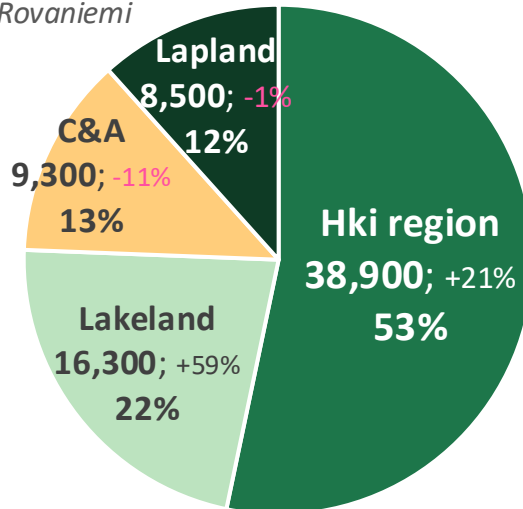
(+13% vs. summer 2024 & -5% vs. summer 2019)

- **1.3M** from EU-27 + UK (+14% & +10%)
- **252,500** from Asia (+27% & -27%)
- **236,100** from America (+16% & +48%)

## French overnights / summer 2025

Growth in Rovaniemi

Growth in Oulu



Growth in Helsinki and Vantaa

Growth especially in Tampere, Savonlinna region, and Jyväskylä region

	Jun-Aug 2019	Jun-Aug 2024	Jun-Aug 2025	2025 vs. 2019	2025 vs. 2024
Germany	270 300	251 500	<b>285 500</b>	+5 %	<b>+14 %</b>
Sweden	255 200	242 300	<b>243 800</b>	-5 %	<b>+1 %</b>
USA	109 900	157 900	<b>177 800</b>	+62 %	<b>+13 %</b>
UK	90 800	87 700	<b>111 000</b>	+22 %	<b>+27 %</b>
Italy	68 200	65 600	<b>86 300</b>	+27 %	<b>+32 %</b>
Norway	73 400	76 800	<b>76 000</b>	+4 %	<b>-1 %</b>
France	64 100	61 400	<b>73 000</b>	+14 %	<b>+19 %</b>
Switzerland	64 400	65 200	<b>72 700</b>	+13 %	<b>+12 %</b>
Netherlands	62 300	59 500	<b>67 900</b>	+9 %	<b>+14 %</b>
China & Hong Kong	133 300	47 400	<b>67 600</b>	-49 %	<b>+43 %</b>
Estonia	69 400	59 400	<b>66 000</b>	-5 %	<b>+11 %</b>
Japan	73 100	46 300	<b>63 600</b>	-13 %	<b>+37 %</b>
Spain	56 600	54 800	<b>61 200</b>	+8 %	<b>+12 %</b>
Poland	31 400	38 300	<b>46 100</b>	+47 %	<b>+20 %</b>
Denmark	37 700	36 400	<b>40 000</b>	+6 %	<b>+10 %</b>
Austria	27 900	28 900	<b>34 500</b>	+24 %	<b>+19 %</b>
Australia	27 600	25 800	<b>29 400</b>	+6 %	<b>+14 %</b>
Belgium	21 500	23 400	<b>25 200</b>	+17 %	<b>+8 %</b>
Canada	17 700	19 000	<b>25 100</b>	+42 %	<b>+32 %</b>
India	27 200	19 600	<b>22 600</b>	-17 %	<b>+15 %</b>



Visit Finland

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

# Foreign overnights in winter high season 2025-2026

And change compared to winters 2024-2025 & (2018-2019)

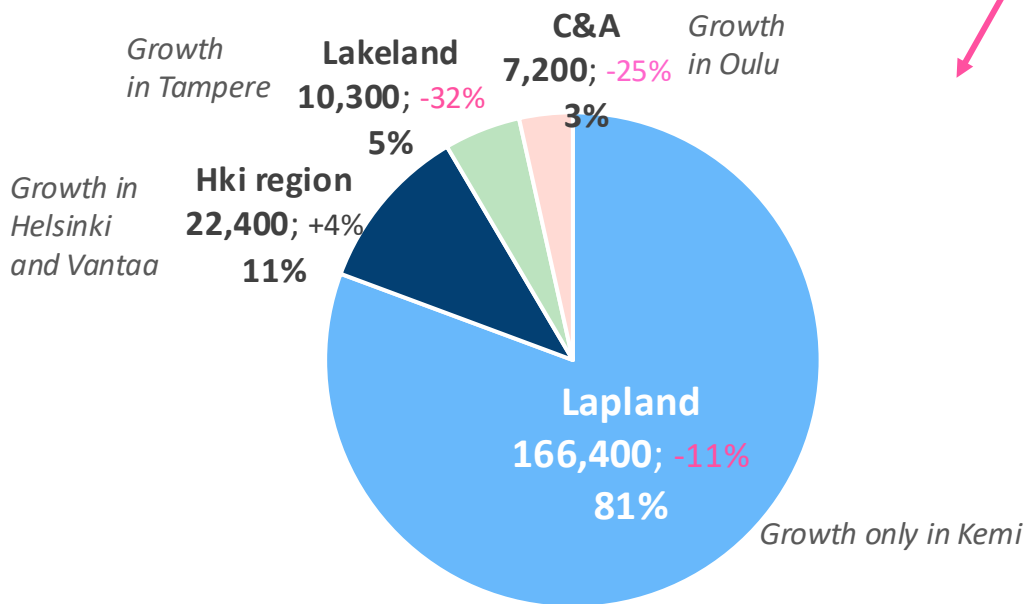
High winter season (12-02)

**2.4M** foreign overnights

**+6%** vs. winter 2025 (+18% vs. winter 2019)

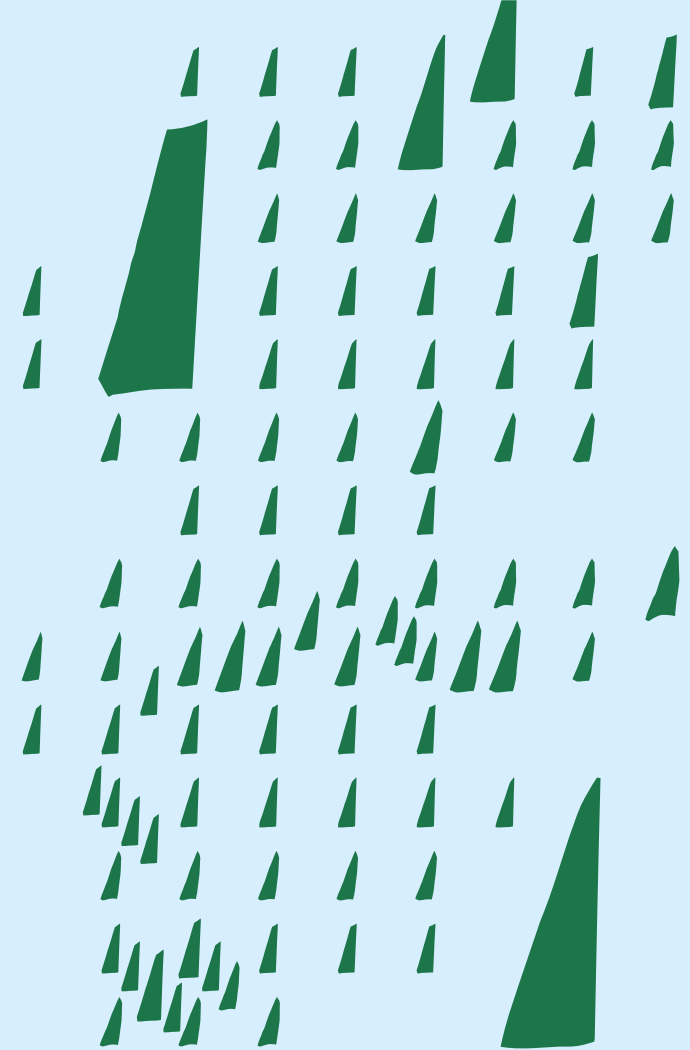
- **1.6M** from EU-27 + UK / **+6%** (+36%)
- **387,200** from Asia / **+8%** (+14%)
- **170,400** from America / **+17%** (+134%)

## French overnights / winter 2025-2026



	winter 2019	winter 2025	winter 2026	winter 2026 vs. 2019	winter 2026 vs. 2025
UK	334 900	379 900	<b>404 900</b>	+21 %	<b>+7 %</b>
Germany	151 300	199 400	<b>232 100</b>	+53 %	<b>+16 %</b>
France	161 700	234 000	<b>206 200</b>	+28 %	<b>-12 %</b>
Netherlands	106 700	149 300	<b>142 900</b>	+34 %	<b>-4 %</b>
USA	53 800	103 800	<b>114 700</b>	+113 %	<b>+10 %</b>
China & Hong Kong	139 700	79 500	<b>89 800</b>	-36 %	<b>+13 %</b>
Italy	42 900	74 800	<b>84 000</b>	+96 %	<b>+12 %</b>
Spain	59 400	73 900	<b>82 900</b>	+40 %	<b>+12 %</b>
Australia	32 600	61 200	<b>81 000</b>	+148 %	<b>+33 %</b>
Sweden	75 100	68 500	<b>76 200</b>	+2 %	<b>+11 %</b>
Switzerland	51 800	68 700	<b>70 200</b>	+36 %	<b>+2 %</b>
Belgium	30 300	51 600	<b>61 800</b>	+104 %	<b>+20 %</b>
Japan	49 900	44 600	<b>54 800</b>	+10 %	<b>+23 %</b>
Estonia	58 200	47 200	<b>54 200</b>	-7 %	<b>+14 %</b>
Singapore	35 300	58 400	<b>49 700</b>	+41 %	<b>-15 %</b>
Taiwan	11 000	24 800	<b>38 500</b>	+252 %	<b>+55 %</b>
Ireland	14 900	32 700	<b>37 400</b>	+151 %	<b>+14 %</b>
India	19 000	37 500	<b>36 600</b>	+92 %	<b>-3 %</b>
Poland	21 900	31 900	<b>33 600</b>	+53 %	<b>+5 %</b>
Denmark	21 200	27 000	<b>33 100</b>	+56 %	<b>+23 %</b>

# French overnights in the Nordic countries



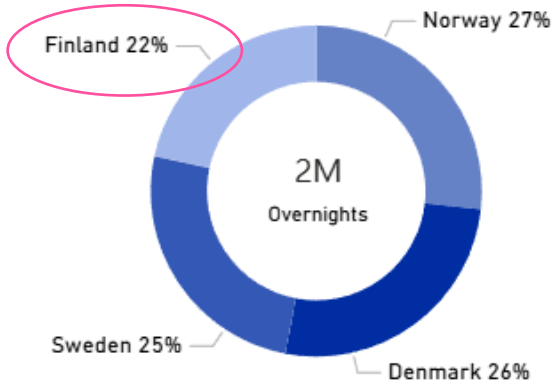
# French registered overnights in the Nordics

Select year for shares

2025

## Share of overnights

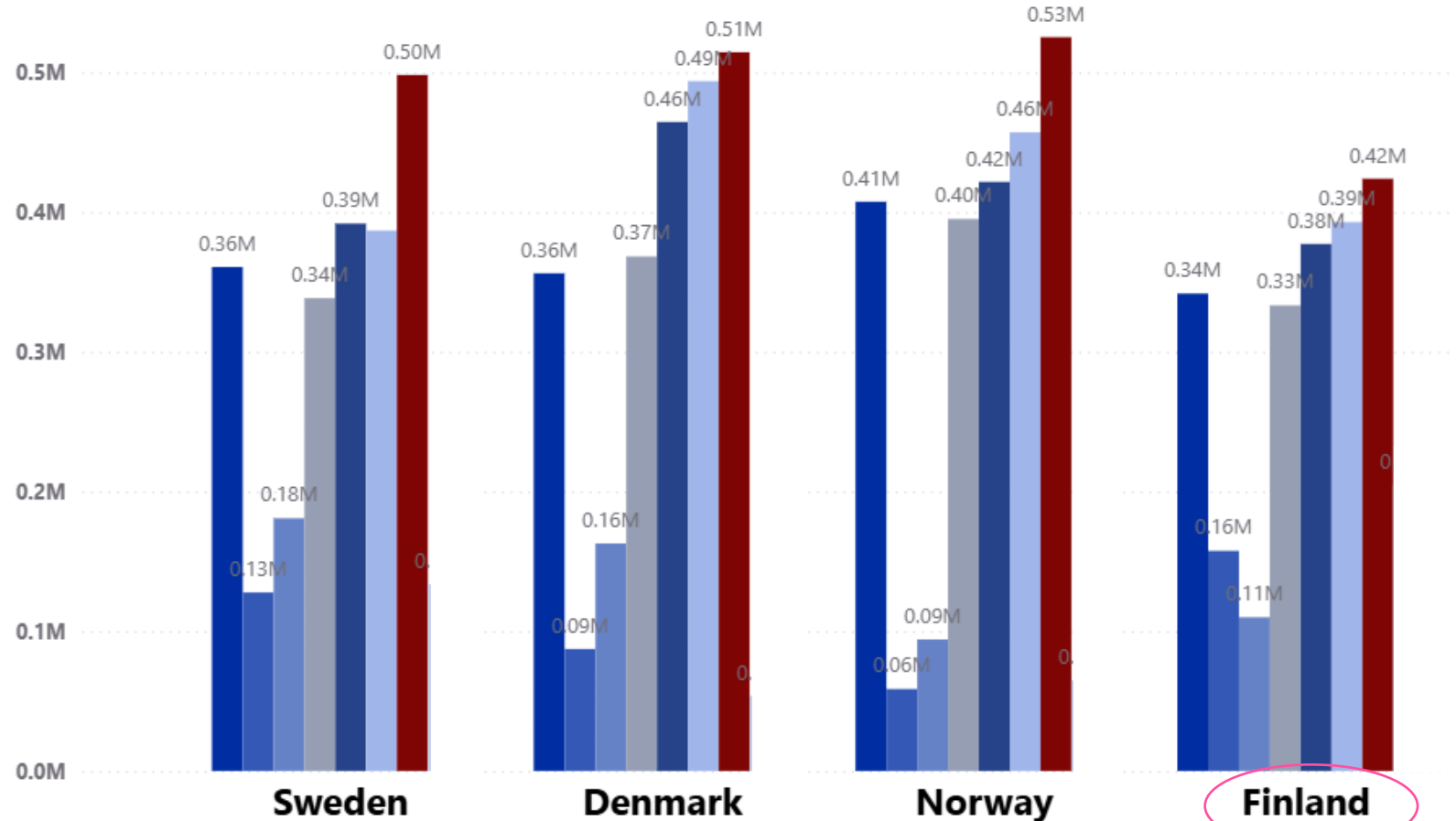
WHOLE COUNTRY Foreign France 1.1.2025-31.12.2025



## Overnights in the Nordic countries

WHOLE COUNTRY Foreign France

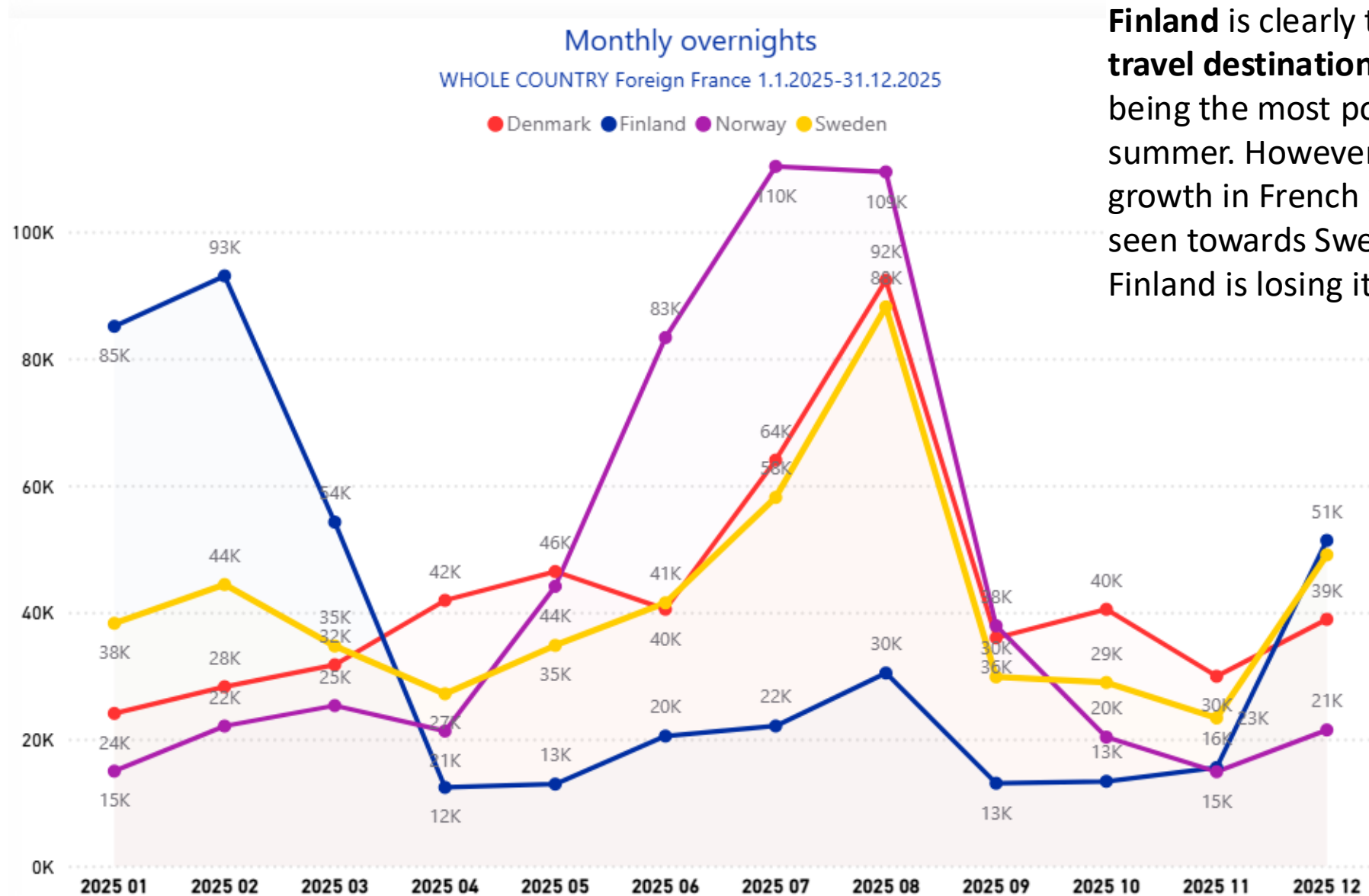
● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025 ● 2026



## Nordic comparison

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Sweden, Norway, Iceland, and Denmark

# French monthly overnights in the Nordics in 2025



Finland is clearly the **leading winter travel destination**, with Norway being the most popular choice in summer. However, the fastest growth in French winter travel is seen towards Sweden, while Finland is losing its market share.

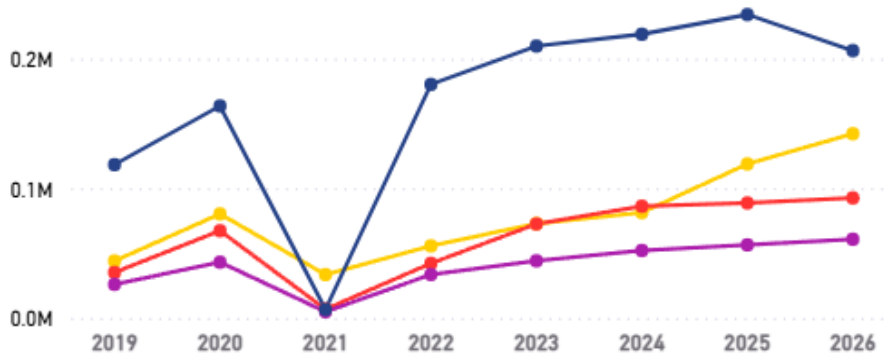
# Winter & summer high seasons: French registered overnights in the Nordics



## Winter (Dec-Feb)

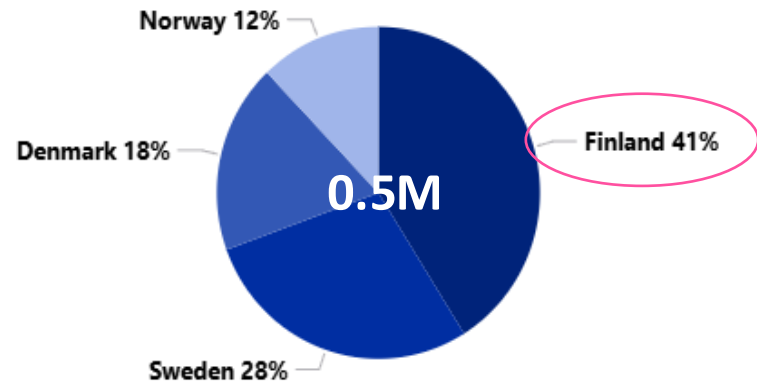
WHOLE COUNTRY Foreign France

● Sweden ● Denmark ● Norway ● Finland



## Share of overnights - winter (Dec-Feb)

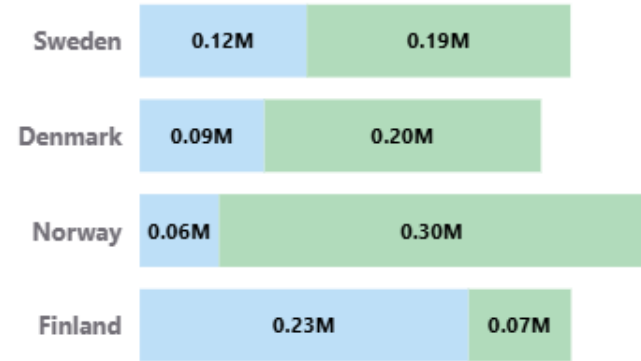
2026



## Overnights in winter & summer

WHOLE COUNTRY Foreign France

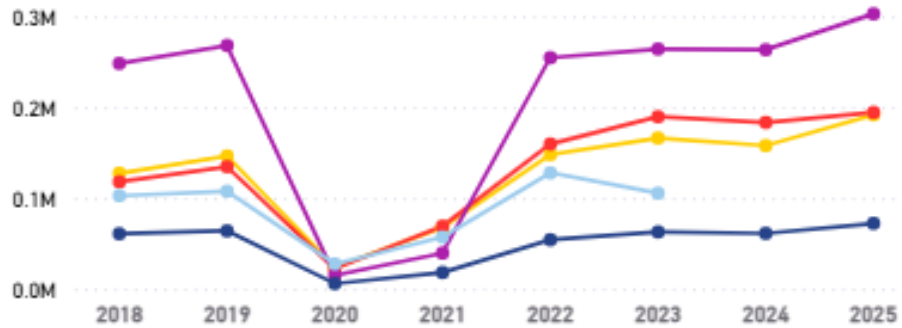
2025



## Summer (Jun-Aug)

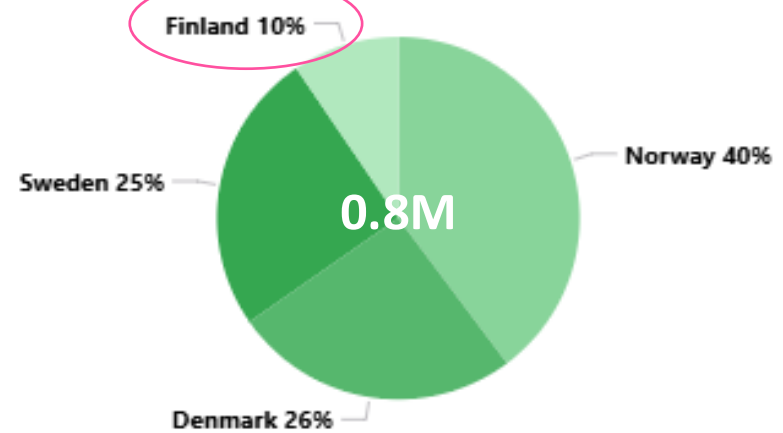
WHOLE COUNTRY Foreign France

● Sweden ● Denmark ● Norway ● Finland ● Iceland



## Share of overnights - summer (Jun-Aug)

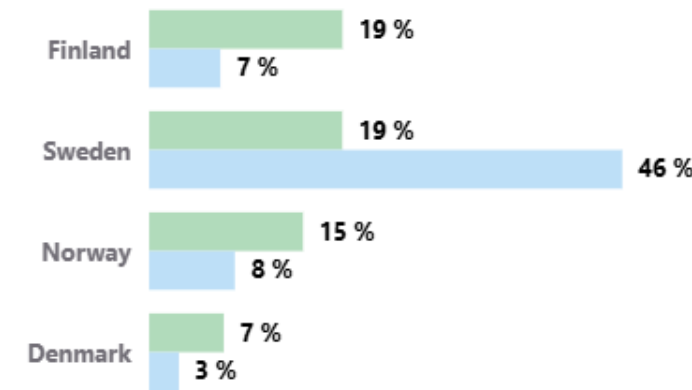
2025



## YoY change in seasonal overnights %

WHOLE COUNTRY Foreign France

2025



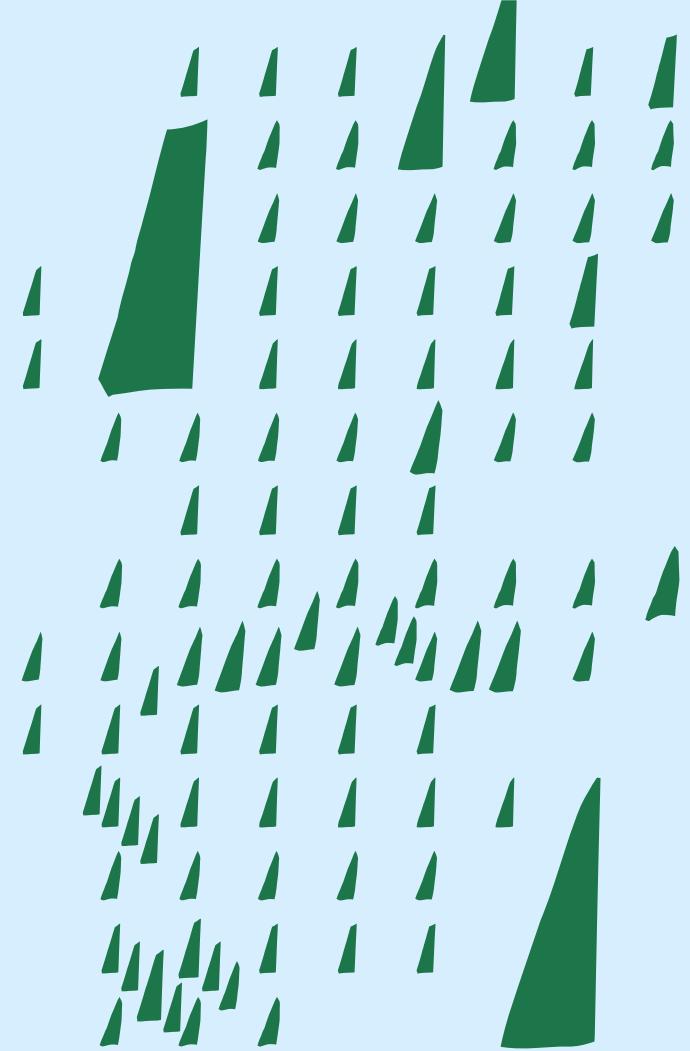
Monthly overnight statistics for Iceland include hotels & guest houses only.



## Nordic comparison

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Sweden, Norway, Iceland, and Denmark

# Summer outlook





Amadeus/Destination Gateway

**Seat capacity &  
forecast for  
Flight arrivals during  
Jun-Aug 2026**

# Seat capacity from France to Finland in Jun – Aug 2026

## Comparison to previous summer

✈ France (excl. domestic) → Finland

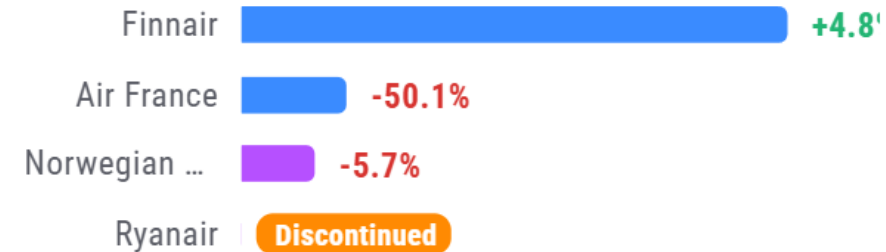
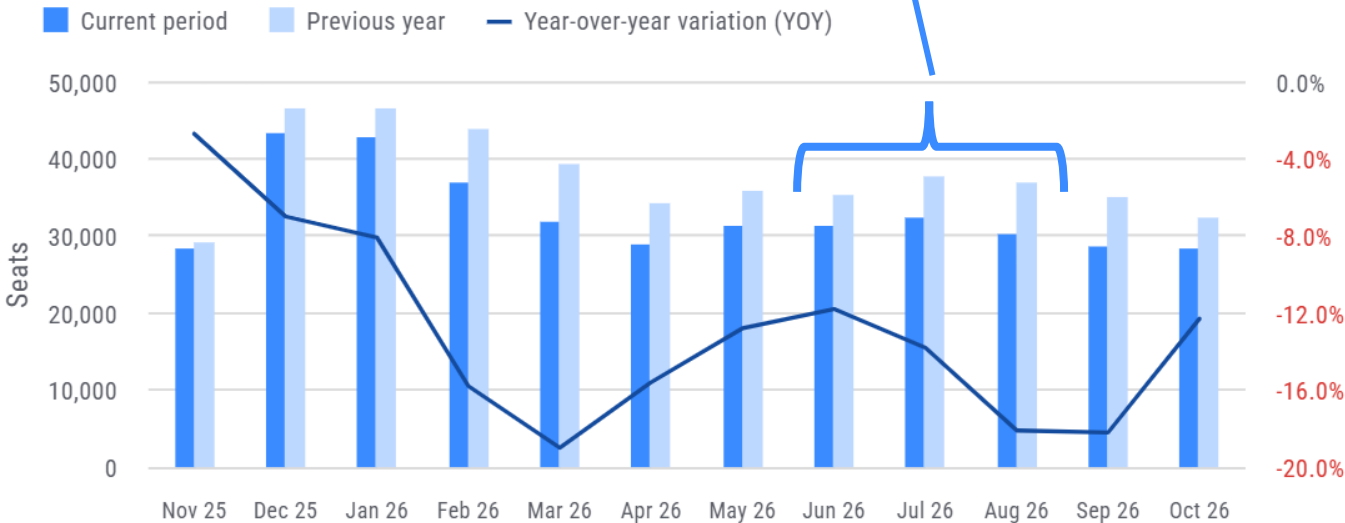
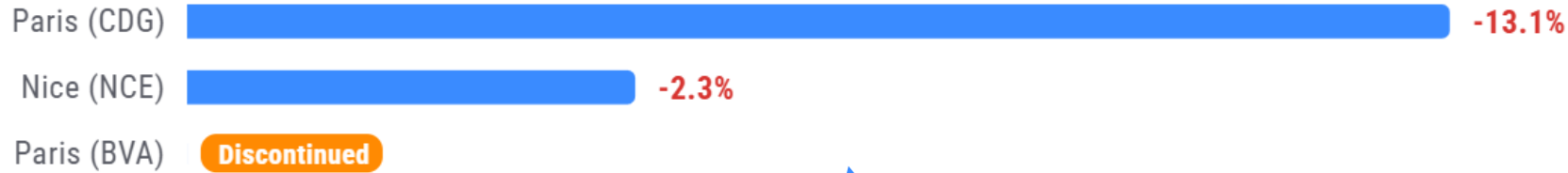
Database update 03 May

Filtered period | 01 Jun 2026 - 31 Aug 2026

2 airports

**-14.6%** YOY for selected locations

Share ↑↓ YOY ↑↓ ...



The total seat capacity from France to Finland will **decrease by 15%** compared to the previous summer.

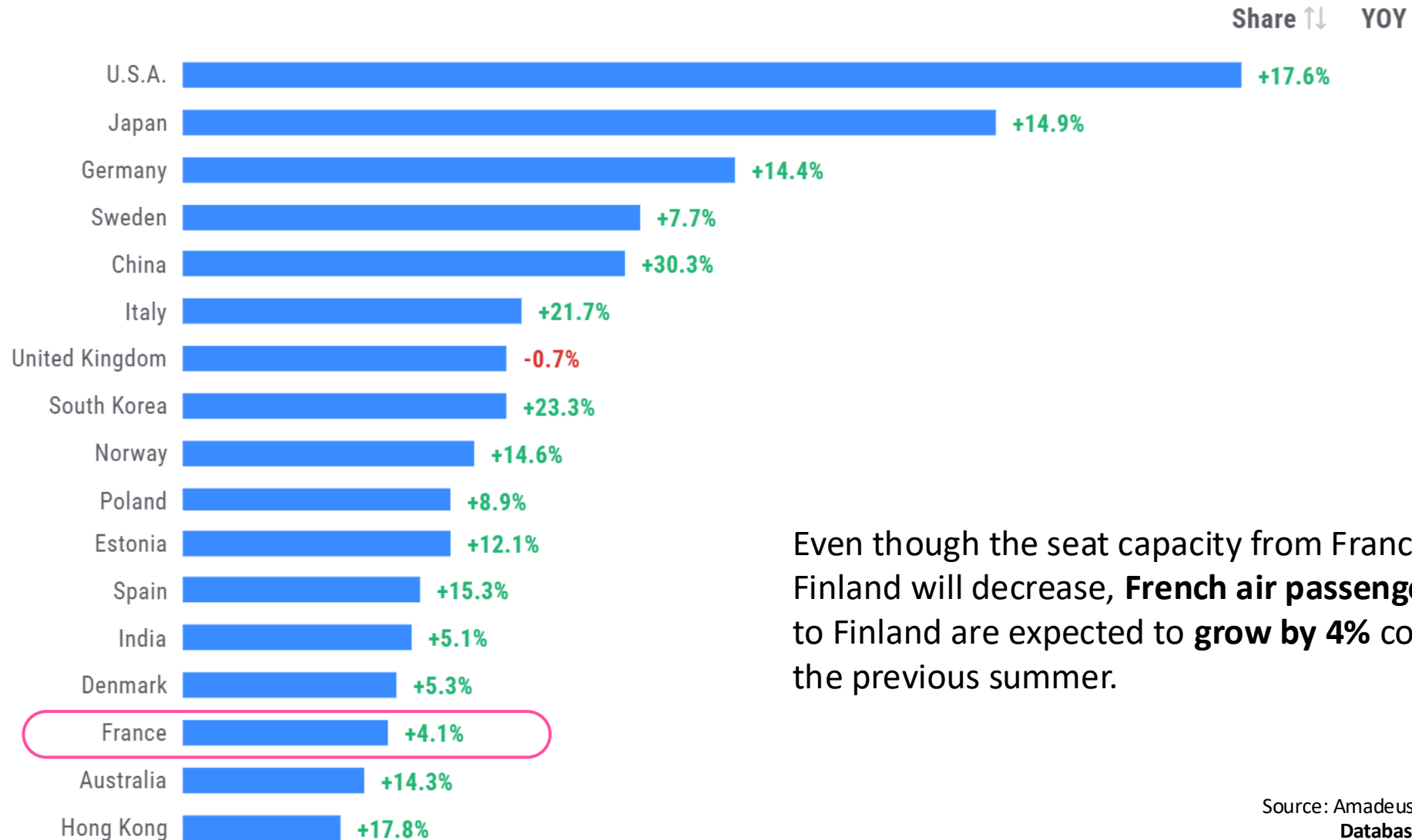
The number of seats available from **Paris** is decreasing by 13% as Air France will have only one flight a day instead of double daily, and Ryanair has discontinued its flights from Paris Beauvais to Finland.

# Forecast for Flight Passenger arrivals in June – August 2026

Comparison to previous summer

582,887 tourist arrivals

+14.7% YOY for selected origins

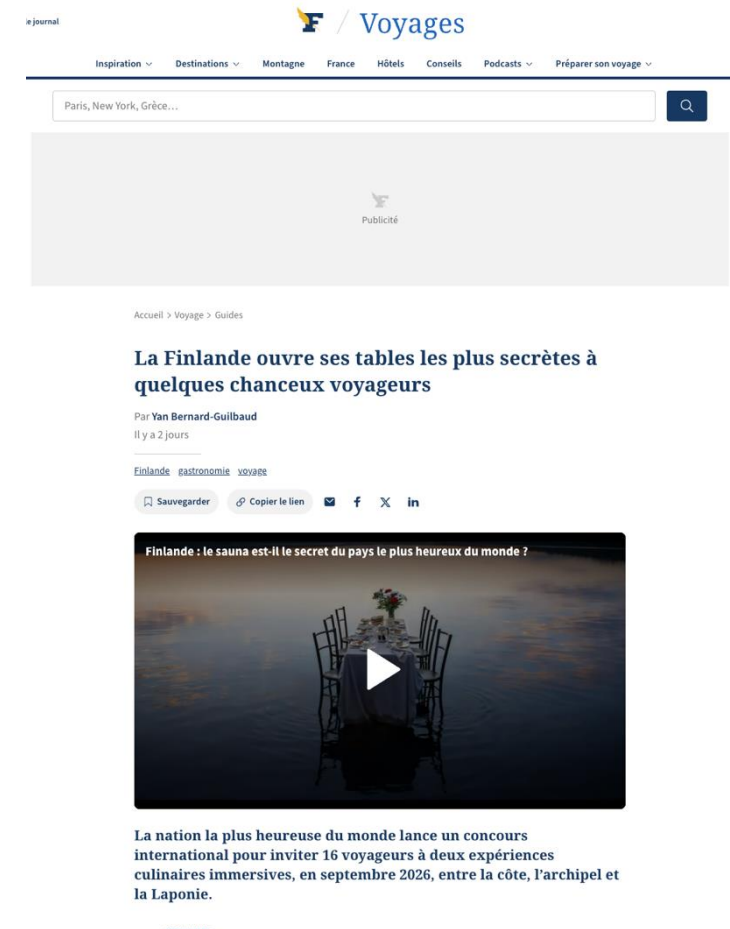


Even though the seat capacity from France to Finland will decrease, **French air passenger arrivals** to Finland are expected to **grow by 4%** compared to the previous summer.

# Industry update and consumer trends

# Finland's position in the market

- **Very strong image** as a winter travel destination (Lapland)
  - Demand for the whole season from December until March/April
  - Also starting to “spread” outside of Lapland (example: Vuokatti)
- **Summer season** less known, but lots of potential in different regions
- **Good accessibility**
  - Air France – Paris-Helsinki (& Direct Lapland flights during winter season)
  - Finnair – Paris-Helsinki, Nice-Helsinki, Paris-Rovaniemi (winter season)
  - Transavia – Direct Lapland flights during winter season
  - Easyjet & Ryanair – Direct Lapland flights during winter season
  - Norwegian – Nice-Helsinki
  - Many charter flights
- **Finland's good image as a sustainable and green** nature destination
- **Competitors:** Norway, Sweden, Iceland, Denmark, and Canada but also French Alps
- **Good visibility** in the media (Finnish happiness, Culture & Food, president Stubb, but also geopolitical situation etc.)
  - PR work (Culture, Food), Chill Like a Finn & Food campaigns



# Consumer trends and behavior

- **Safety** of the destination is one of the main criteria
- **Inflation** is impacting choices, but travel budget are “sacred”
- **Demand for nature and outdoor activities** with room to roam
- **Food and Culture – growing interest in** Finnish sauna culture, design, and lifestyle
  - Experiences and learning during travelling: meet the locals and live like a local experiences
- **Demand for services** and budget for it -> Availability of services!
- **Out of a common experiences** and **authentic accommodation**
- **Coolcation** – demand for cooler summer destinations with outdoor activity possibilities

## Sustainability

- Growing demand for:
  - eco-friendly travel
  - rail-accessible destinations
  - longer stays, local immersion and “slow travel”

This especially affects younger urban consumers.

# Consumer trends and behavior

## Premiumization

- Higher-income French travelers continue spending strongly on:
  - luxury resorts
  - tailor-made tours & packages
  - wellness travel & cultural experiences

The premium segment is growing faster than mass-market package tourism

## Digital and Booking Behavior

- French travelers increasingly:
  - compare across platforms
  - self-package trips & book dynamically
  - rely on mobile-first research
- Use of different **OTA channels and renting platforms** (e.g. Airbnb)
  - French tourists are among the most avid users of Airbnb-type short-term rentals in Finland
- Traditional tour operators remain important, especially for:
  - senior travelers
  - cruises
  - organized medium & long-haul circuits (e.g. winter packages in Finland)

**Role of AI** in travel planning growing – 1/3 of French use AI agent in purchasing process (strong especially in travel bookings)



# Industry update and distribution channels

- France is the 3rd largest outbound market in Europe
- French travellers' registered overnights grows every year
- Growing demand also for the summer season - still need for product development
- Big tour operators with own charter flights and many smaller, specialized operators, selling actively Finland (e.g. Outdoors, Culture, High-end)
- Main OTA channels selling Finland: *Voyage Privé, Opodo, Veepee and Expedia.*
- Role of the incoming agencies is important !
  - need for local, Finland based operators
  - need for French speaking guiding services
  - need for tailor-made products



# Future outlook and upcoming season

- Coming summer season looks good, but still lots of uncertainty because of geopolitical situation
- **Accessibility** stays good
  - Good connections from Paris to Helsinki and from Nice to Helsinki
- **New potential target groups:**
  - Incentive groups and seniors (travelling out of the holiday seasons and during shoulder seasons)
  - High end and luxury segments
- According to the forecast of Tourism Economics, French overnights are expected to **grow by 71%** and **spending by 89%** over the next decade in Finland

The French outbound market remains strong but increasingly value conscious. Safety, affordability, flexibility, and authentic experiences are becoming the main drivers of destination choice.

## Outlook for the French Outbound Market (2026–2028)



### Positive Drivers

- Strong travel culture
- Large middle and upper-middle class
- Recovery of international air capacity
- Continued appetite for leisure experiences

### Main Risks

- Weak economic growth & Fiscal tightening
- Political instability
- Energy shocks & Aviation cost inflation
- Geopolitical crises affecting traveler confidence

# 2027 planning

# Activity plan 2027

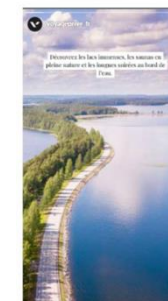
## FRANCE

### B2C Image Campaigns

- Global Image campaign
- OTA Summer campaign TBC

### Joint Promotions

- Joint promotions, 50-50 funding basis
  - TO-OTA / Visit Finland / partners
- Campaign formats to boost awareness and increase sales and tour production
  - Effective, value for money



# Activity plan 2027

## FRANCE

### Sales Events & B2B

- Matka 2027
- Nordic Workshop 2.3.2027
- PURE Event & Meetings 12.3.2027 (FCB) TBC
- IFTM Top Resa 2027 Nordic Stand TBC
- Road show events with Tour operator partners
- Learning webinars for sales teams /agencies

### Famtrips

- Joint famtrips for European markets

### Other activities

- Team Finland work and Country branding



### Nordic Workshop

France 2026

Paris – 17<sup>th</sup> March



VisitDenmark 🇩🇰

Visit Finland

Visit Iceland

Visit Norway

***Merci!***

