Benelux Market Report
November 2018

Visit Finland Country Representatives
Susan van Egmond
Semiannual Report – BENELUX
Summer season 2018 and outlook for winter 2018-19

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• Outlook for the winter season 2018-19
• Prospects for the spring/summer season 2019
• Trends and other relevant travel related topics
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Factors affecting the results of the summer season 2018

Reasons for the increase/decrease in overall outbound travelling from your market?

CON:
• Extremely warm and rain-free summer in the Benelux caused many to prefer a domestic holiday, that would otherwise have been outbound travel, causing a decline of ‘holiday – participation’ in the first half of 2018: approx. 79% as normally slightly higher than 80%

PRO:
• General Holiday Expenditure at high level due to economic upturn in 2017-2018
• More popularity for ‘special interest’ destinations
Factors affecting the results of the summer season 2018

Reasons for the increase/decrease in travelling to Finland?

Changes in demand
- more domestic holidays due to good weather in Benelux
- Allotments harder to get for Trade in peak season (Winter peak) due to increased demand from other source markets

Finland’s image as a travel destination
- Safety Perception is very good
- Friendly population
- Cultural interest (Design, City Break Helsinki)
- Summer product perceived as somewhat ‘boring’ as compared to more articulated landscapes in other Scandinavian countries
- Overall, the knowledge level is limited with the consumer

Changes in distribution
- Growth ambition of Voigt to start marketing Summer from their charter flight to Rovaniemi, also wanting to increase Winter.
- Other trade indicates to be inclined to consider expansion.
- TUI fly only interested in expanding into summer product in case VF is willing to invest in 3 year joint promotion commitment plan.

Changes in accessibility
- Connectivity is key, more cooperations with airlines and TO’s with charters
Factors affecting the results of the summer season 2018

Reasons for the increase/decrease in travelling to Finland?

**Products that have been attractive**
Roundtrips in Lapland
City break plus Helsinki region in combination with other capitals in the region like Stockholm
Roundtrips in Central/South Finland in Summer

**Regions that have been attractive**
Lapland & Helsinki Region
Vuokatti region
Levi Region

**Campaigns, joint promotions results**
- Voigt Travel, Winter joint promotion: goal set overperformance: +65.5%
  Summer joint promotion: goal set underperformance of: -12%

- Buro Scanbrit: Summer joint promotion: 13% increase in summer bookings
  Buro Scanbrit; extra ticket sponsoring promotion with Exclusive Sportcenters
  20,000 consumers returned their stamp card and made a chance to win a trip to Finland. This is a record of people who joined the campaign according to the Exclusive Sportcentra. This was at no cost to VF except sponsoring of 32 tickets. This deal was initiated by TMC
Outlook for the winter season 2018-19

The overall outlook of travelling to Finland for the coming winter?

Increase/decrease and reasons for the increase/decrease

• Probably some growth will be achieved:
• Finland continues to be viewed as an interesting niche alternative to Alpine Wintersport, however:
• This season the Alpine regions have had heavy snowfall early in the season; this might affect bookings for Finland this season and less growth might be achieved because of this.

New winter products
Sawadee: Paljakka Lapland winter trip
Scandinavian Wintersports: minicamper trips

New sales channels
Secret Escapes (cooperation with Voigt Travel)
Travix brands like Cheaptickets.nl are selling also accommodations nowadays
Outlook for the winter season 2018-19

The overall outlook of travelling to Finland for the coming winter?

What are the trends for the winter 2018-19?
• ‘fitcation’: getting fit on your holiday
• Cruise appeals to younger target groups as well
• Citytrips to less common destinations (e.g. Krakau, Warschau, Bilbao, Valletta)

Which are the traveller segments?

B2B:
MICE

B2C:
Active travel
Wellness segment
Cultural / city trip segment
Outlook for the winter season 2018-19

Ad hoc marketing opportunities

**TO cooperation:**
Small winter special proposal by Scanbrit (see system)
Selected 4 hosted buyers to go to Matka
Regular winter joint promotion with Voigt travel

**Joint promotions:**
Cooperation with fitness centra
We negotiated a special prize with Buro Scanbrit

**PR**
All you need is love Christmas special
3.5 million viewers – broadcasted on the 24th of December
Bringing loved ones together in the environment of Levi
Levi confirmed participation
Largest Wintersports channel in NL; Wintersport.nl 102k FB fans, journalist will be hosted & report on LEVI world Championships 2018
Blogger activity to Levi using empty seats on the Scanbrit/TUI charter
Christmas market support for the Vuokatti region

**Events:**
Participating in the supplier conference of Travel Counsellors
As a result of the Fam trip Travel Counsellors is training various staff to become Finland specialists
Participating in the Travel Club Day – presentation to train over 300 TA
Prospects for the spring/summer season 2019

The overall outlook of travelling to Finland?

What trends should be considered in product development to increase the demand in the spring/summer time?

• Streamlining the Finnish season with the European holidays season
• August is a main holiday season and many Finnish accommodations are closed
• Preparing a list per region of what is open and what not
• 'Rent you own island'- theme idea (counteract overtourism)
• Prepare an autumn itinerary
• Fitcation: target the biking segment with special itineraries e.g. in Archipelago or Lakeland
• More & shorter breaks: the Benelux consumer tends to book more trips with less overnight stays.
• City breaks become more popular; City & Nature product development
• Tiny houses in nature / secluded locations, 'off the grid', sustainable accommodations

Which present target groups should be considered to increase the demand?

• Families in the holiday season
• Sportive groups – Nature trekking, Bicycling tours, Island hopping per canoe
• Elderly couples in shoulder season

Which new target groups should be considered to increase the demand?

• City trippers to the lesser known cities like Tampere
• City trip plus (Helsinki and the Archipelago region)
• Individual travelers through OTA’s
• Road trip with fixed itineraries with E-vehicles
Trends and other relevant travel related topics

**Trends**

*Any new travel trends on your market? What’s hot now on your market (BtoC and/or BtoB)*

- Changing roles of travel industry: Travel agents are becoming more and more important
- Specialism is key: TA are back in the picture due to specialist know-how
- Meaningful/conscious travel: travel to generate more new skills
- Getting off tourist paths: an opportunity for summer in Finland
- Dark sky watching

**New distribution channels**

Your suggestion on how to develop business with them: what needs to be done?

- OTA's
- Mobile Travel agents chain
- Brick travel agents becoming small TOO

**Online channels**

Channels where Visit Finland should be present and suggestion of how to be present

- B2C
  - News sites like nu.nl, nos.nl, rtl.nl, hln.be, knack.be, canvas.be
  - De Telegraaf
  - Columbus travel, L'officiel,
  - Large online players are: marktplaats.nl, funda.nl, etc.
Belgium – Market Review
Belgian overnight stays in Finland
Seasonal overnights in 2016, 2017 & 2018

Whole Finland

<table>
<thead>
<tr>
<th>Season</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>Actual / (expected) seasonal change</th>
<th>Reasons behind the actual / expected change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter (Dec-Feb)</td>
<td>16 300</td>
<td>21 100</td>
<td>28 100</td>
<td>+29% vs. 2016</td>
<td>Winter 2016 +34%</td>
</tr>
<tr>
<td>Spring (Mar-May)</td>
<td>14 300</td>
<td>17 300</td>
<td>17 700</td>
<td>+21% vs. 2016</td>
<td>Spring 2016 +2%</td>
</tr>
<tr>
<td>Summer (Jun-Aug)</td>
<td>19 400</td>
<td>19 700</td>
<td>20 400</td>
<td>+1% vs. 2016</td>
<td>Summer 2016 +4%</td>
</tr>
<tr>
<td>Autumn (Sep-Nov)</td>
<td>9 900</td>
<td>11 200</td>
<td>20 400</td>
<td>+13% vs. 2016</td>
<td>Autumn 2016 +3%</td>
</tr>
</tbody>
</table>

Belgian overnight stays in Finland by season in 2017

- Winter (Dec-Feb) 16 300
- Spring (Mar-May) 14 300
- Summer (Jun-Aug) 19 400
- Autumn (Sep-Nov) 9 900

Coast & Archipelago 2018

<table>
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<th>2017</th>
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<tr>
<td>Winter</td>
<td>3 500</td>
<td>+17%</td>
<td></td>
</tr>
<tr>
<td>Spring</td>
<td>3 400</td>
<td>+8%</td>
<td></td>
</tr>
<tr>
<td>Summer</td>
<td>3 700</td>
<td>-7%</td>
<td></td>
</tr>
</tbody>
</table>

Year 2017

- Lapland 2018
  - Winter 17 400 +46%
  - Spring 5 500 +5%
  - Summer 2 900 -3%

- Lakeland 2018
  - Winter 1 400 -2%
  - Spring 1 600 -16%
  - Summer 4 200 +3%

Helsinki area 2018

- Winter 5 800 +23%
- Spring 7 100 +3%
- Summer 9 673 +12%

Source: Rudolf data base, Statistics Finland
Trends for seasonal overnights in Finland – Belgian visitors

- High winter season (12-02)
- High spring season (03-05)
- High summer season (06-08)
- High autumn season (09-11)

Source: Visit Finland Statistics Service Rudolf, Statistics Finland
Netherlands – Market Review
Dutch overnights in Finland

Seasonal overnights in 2016, 2017 & 2018

<table>
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<tr>
<th>Season</th>
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<tr>
<td>Winter</td>
<td>61 900</td>
<td>86 800</td>
<td>102 300</td>
</tr>
<tr>
<td>Spring</td>
<td>36 700</td>
<td>45 000</td>
<td>52 900</td>
</tr>
<tr>
<td>Summer</td>
<td>49 600</td>
<td>59 500</td>
<td>57 300</td>
</tr>
<tr>
<td>Autumn</td>
<td>25 400</td>
<td>30 300</td>
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Lapland 2018

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<td>+46%</td>
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<td>13 737</td>
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Lakeland 2018

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<tr>
<td>Winter</td>
<td>9 100</td>
<td>+82%</td>
</tr>
<tr>
<td>Spring</td>
<td>7 000</td>
<td>+4%</td>
</tr>
<tr>
<td>Summer</td>
<td>12 800</td>
<td>-10%</td>
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Cost & Archipelago 2018

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<tr>
<td>Summer</td>
<td>9 700</td>
<td>-9%</td>
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Helsinki area 2018

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