India
Travel insights
Finland’s image as a travel destination in India

Indian Market Segment: High Spending FITs. Opportunities and Challenges for Nordic Destinations 2020
TOP LEVEL ASSOCIATIONS, NORDICS

(region, rather than individual countries)
- Northern Lights
- Snow and ice
- Snow related activities
- Closeness to nature
- Connection with history
- Unique and ‘wow’ factor experiences
- Pushes you outside your comfort zone
- Sustainability

Source: Indian Market Segment: High Spending FITs – Opportunities and Challenges for Nordic Destinations, April 2020
REASONS TO GO TO THE NORDICS: WINTRY DELIGHTS

- Winter related activities
- The Northern Lights
- Fjords
- Closeness to nature
- Famed locations or things to do
- A connection with the past
- Wellbeing

Where there are deeper end benefits

Calm
Deep Quiet
Freshness

Source: Indian Market Segment: High Spenders FITs – Opportunities and Challenges for Nordic Destinations, April 2020
SUMMER AN UNTAPPED SEASON

- Not widely associated with non winter seasons
- Yet a particular opportunity vs. the increasingly hot Southern / Central European destinations

Source: Indian Market Segment: High Spending FITs - Opportunities and Challenges for Nordic Destinations, April 2020
Travel related searches

Digital Demand 2019
Top countries and topics in Finland’s touristic internet searches globally

- **5,1 million** travel-related internet searches in 2019
- **+23% growth** in searches from previous year

### Top 3 topics by volume and growth

- **Tourism**
- **Northern Lights**
- **Travel**

### Top countries and markets

<table>
<thead>
<tr>
<th>Flags</th>
<th>Markets</th>
<th>2019</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>🇨🇳</td>
<td>Japan</td>
<td>556,756</td>
<td>+37,3%</td>
</tr>
<tr>
<td>🇷🇺</td>
<td>Russian Federation</td>
<td>524,545</td>
<td>+15,9%</td>
</tr>
<tr>
<td>🇩🇪</td>
<td>Germany</td>
<td>455,265</td>
<td>+37,9%</td>
</tr>
<tr>
<td>🇺🇸</td>
<td>United States</td>
<td>402,123</td>
<td>+20,4%</td>
</tr>
<tr>
<td>🇬🇧</td>
<td>United Kingdom</td>
<td>353,340</td>
<td>+39,1%</td>
</tr>
<tr>
<td>🇨🇳</td>
<td>China</td>
<td>317,465</td>
<td>-16,3%</td>
</tr>
<tr>
<td>🇫🇷</td>
<td>France</td>
<td>248,971</td>
<td>+20,9%</td>
</tr>
<tr>
<td>🇮🇹</td>
<td>Italy</td>
<td>223,324</td>
<td>+21,9%</td>
</tr>
<tr>
<td>🇪🇸</td>
<td>Spain</td>
<td>205,899</td>
<td>+21,7%</td>
</tr>
<tr>
<td>🇮🇳</td>
<td>India</td>
<td>157,504</td>
<td>+33,4%</td>
</tr>
<tr>
<td>🌍</td>
<td>Rest of the world</td>
<td>1,694,428</td>
<td>+24,7%</td>
</tr>
</tbody>
</table>

*Source: D2 Digital Demand*
Saunas, Santa Claus and lakes represent the USP’s where Finland stands out from its fellow Nordic destinations. Forests also differentiate Finland, although they are as often related to Norway.

Other brandtags reaching close to the top 20 most searched topics and growing fast especially for Finland include spa & beauty treatments, islands and parks & reserves.
Most popular Visit Finland website content during summer 2020
June-August 2020 vs. June-Aug 2019
Compared to same period in 2019 (June-Aug 2019)

- Traffic during summer has decreased by fifth compared to same time last year
- Both organic and paid traffic have decreased a little
  - Traffic from all countries has NOT dropped compared to last year
  - From Germany, UK, Netherlands, Switzerland, Japan traffic has increased
  - Bigger decreases in traffic (over -20% decrease): Sweden, Italy, China, Spain, Russia
- During summer 2020 traffic was close to same as last year
  - On a few days we reported higher traffic than year before
  - We have less campaigns now that year before and the traffic is only about a fifth behind last year overall
- Most traffic still comes from Google search, as before, also Social Media brings a lot of traffic

June-August 2020 vs. Mar-May 2020
Compared to previous period (March-May 2020)

- Traffic has increased from spring substantially
  - Virtual Rent a Finn –campaign in May was a success!
  - The traffic stayed at a higher rate after the campaign
- Organic traffic has increased and paid traffic has decreased
  - Germany, Switzerland, Netherlands, Austria, Norway and Estonia are the countries that have increased in organic traffic most
  - Biggest traffic decreases from (around -30%): Italy and Spain
  - Increase in traffic from both Google and Social Media
  - Direct traffic, organic Yahoo & Bing as well as organic Facebook traffic have continued to increase in August
- Most read articles including all language versions:
  - COVID-19 traveler info article
  - 21 Reasons to Love Finland
  - Iconic Finnish foods of all time

- New articles have been released during summer; for example Virtual tour around Finland & Extraordinary life in the Archipelago.
- More new content is in the pipeline

Source: Visit Finland
Popular Articles on visitfinland.com during summer 2020:

- Practical Information for Travelers to Finland during Corona Pandemic
- 21 Reasons to love Finland
- Land of the Midnight Sun
- Doze off under the Northern Lights
- Land of a Thousand lakes
- On a Virtual Tour Around Finland
- On the Hunt for the Northern Lights
- 10 Best Things to do in Finland
- 17 Reasons to Visit Finland in 2017
- What are the Finns like?

Additionally during the Autumn 2020:
- Meet Santa Claus
- Autumn and Spring – the Best Northern Lights Seasons

During the summer months Indian site visitors were mostly interested in Midnight Sun, Lakes, Northern Lights and general information on Finland, reasons to visit and what to do in Finland.

During this autumn the interest has otherwise stayed very similar but autumn themed article on Northern Lights and Santa Claus increased in popularity.
Indian overnights in the Nordic countries & in Finland

Statistics Service Rudolf, Statistics Finland
Statistics Sweden, Norway, Denmark and Iceland
India: Yearly overnights in the Nordic countries

Development of Indian overnights 2009-2019

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

Nordic countries’ share of Indian overnights 2019

0.6M overnights in total

Statistics for Norway available since 2018, and for Denmark and Iceland since 2013

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Denmark, Statistics Norway, Statistics Sweden and Statistics Iceland
Indian overnights in Finland 2000-2019

Year 2019
17th in country rankings with a 1% share of foreign overnights
Average change 2000-2019: +14%
Change 2019 compared to 2000: +434%

Share of overnights by regions 2019
65% 14% 8% 13%

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland
INDIAN OVERNIGHTS IN FINLAND BY SEASON

Growth especially in
- Helsinki and Vantaa
- Rovaniemi and Inari-Saariselkä

Indian overnights in 2019
- Winter (12-02): 19%
- Autumn (09-11): 19%
- Spring (03-05): 24%
- Summer (06-08): 27%
Consumer sentiment and trends in India
Indian consumers’ optimism in the economic recovery has improved steadily, reaching levels last seen in mid-April.
Indian consumers are most concerned about visiting crowded public spaces, attending large events, and traveling by public transportation.

### Consumers’ level of concern undertaking various activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>% of respondents</th>
<th>Not worried</th>
<th>Somewhat worried</th>
<th>Worried</th>
<th>Level of concern</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop for groceries/necessities</td>
<td>23%</td>
<td>29%</td>
<td>52%</td>
<td>47%</td>
<td>24</td>
</tr>
<tr>
<td>Shop for non-necessities</td>
<td>18%</td>
<td>30%</td>
<td>52%</td>
<td>54%</td>
<td>34</td>
</tr>
<tr>
<td>Drive more than 2 hours from home</td>
<td>22%</td>
<td>25%</td>
<td>51%</td>
<td>54%</td>
<td>32</td>
</tr>
<tr>
<td>Get together with family</td>
<td>20%</td>
<td>25%</td>
<td>51%</td>
<td>55%</td>
<td>35</td>
</tr>
<tr>
<td>Work outside my home</td>
<td>16%</td>
<td>28%</td>
<td>57%</td>
<td>52%</td>
<td>42</td>
</tr>
<tr>
<td>Go to a shopping mall</td>
<td>14%</td>
<td>26%</td>
<td>60%</td>
<td>50%</td>
<td>46</td>
</tr>
<tr>
<td>Get together with friends</td>
<td>14%</td>
<td>26%</td>
<td>60%</td>
<td>51%</td>
<td>46</td>
</tr>
<tr>
<td>Go to a hair or nail salon</td>
<td>16%</td>
<td>23%</td>
<td>61%</td>
<td>51%</td>
<td>45</td>
</tr>
<tr>
<td>Rent a short-term home</td>
<td>15%</td>
<td>24%</td>
<td>61%</td>
<td>51%</td>
<td>46</td>
</tr>
<tr>
<td>Dine at a restaurant or bar</td>
<td>16%</td>
<td>26%</td>
<td>62%</td>
<td>52%</td>
<td>46</td>
</tr>
<tr>
<td>Use a ride-sharing service</td>
<td>14%</td>
<td>23%</td>
<td>64%</td>
<td>50%</td>
<td>50</td>
</tr>
<tr>
<td>Use a clothing rental service</td>
<td>16%</td>
<td>20%</td>
<td>64%</td>
<td>50%</td>
<td>48</td>
</tr>
<tr>
<td>Go to the gym or fitness studio</td>
<td>16%</td>
<td>22%</td>
<td>64%</td>
<td>50%</td>
<td>50</td>
</tr>
<tr>
<td>Stay in a hotel</td>
<td>13%</td>
<td>23%</td>
<td>64%</td>
<td>51%</td>
<td>51</td>
</tr>
<tr>
<td>Travel by airplane</td>
<td>14%</td>
<td>19%</td>
<td>68%</td>
<td>54%</td>
<td>54</td>
</tr>
<tr>
<td>Go out for family entertainment</td>
<td>13%</td>
<td>19%</td>
<td>68%</td>
<td>55%</td>
<td>55</td>
</tr>
<tr>
<td>Use public transportation</td>
<td>11%</td>
<td>19%</td>
<td>70%</td>
<td>59%</td>
<td>59</td>
</tr>
<tr>
<td>Attend a large event</td>
<td>10%</td>
<td>20%</td>
<td>70%</td>
<td>60%</td>
<td>60</td>
</tr>
<tr>
<td>Visit a crowded outdoor public place</td>
<td>10%</td>
<td>19%</td>
<td>71%</td>
<td>61%</td>
<td>61</td>
</tr>
</tbody>
</table>

1. How worried would you be if you were to do the following activities in the next two weeks? Possible answers: “not worried at all”, “not very worried”, “somewhat worried”, “very worried”, “extremely worried.” Figures may not sum to 100% because of rounding.

2. Level of concern is calculated by subtracting the % of respondents stating “not worried at all” and “not very worried” from “very worried” and “extremely worried.”


Most Indians are waiting for indicators beyond lifting of restrictions, but more are engaging in ‘normal’ out-of-home activities

Milestones for the Indian population not yet engaging with out-of-home activities
% of respondents awaiting each milestone before engaging

- Government lifts restrictions: 28%
- Government lifts restrictions + other requirement: 72%
- Only once there’s a vaccine or treatment: 14%
- Medical authorities deem safe: 21%
- Stores, restaurants, and other indoor places start taking safety measures: 24%
- I see other people returning: 12%

1 Q: Which best describes when you will regularly return to stores, restaurants, and other out-of-home activities? Chart refines to exclude those already participating in these activities and those who do not deem any of these items important. Figures may not sum to 100% because of rounding.

INDIAN TRAVEL HABITS & THE INDIAN HSFIT MARKET

• Status display - conformism to individualism
• Moving away from the destination ‘tick-list’ and interest in the previously unknown
• A market more daring
• Captured through social media
• Smaller group sizes
• High opportunity market, in its nascency

Source: Indian Market Segment: High Spending FITs – Opportunities and Challenges for Nordic Destinations, April 2020
Global outlook for post-covid19 travel trends and traveller needs
New normal – first impacts on travel demand

- Being immersed in nature and culture are likely to see a surge in interest as the tide turns on mass tourism and “Off the beaten path” destinations with wide open space become more popular.
- After lockdowns and remote work, consumers are looking for nature activities, wellness, luxury as well as transformational experiences.
- As the social and environmental sustainability awareness increases, “Back-to-basics” & “live-like-a-local” trends get stronger.
- Families and small groups travelling together.
- Cruise travel will be negatively impacted.

→ what will this wealthy segment be looking for to escape the everyday life, in order to experience relaxation and indulgence?

Source: THE IMPACT OF CORONAVIRUS ON TRAVEL AND TOURISM, Euromonitor May 2020
Going towards the new normal

- Travel brands and destinations will need to become more consumer-centric to ensure their customers and staff feel safe and secure as the phased recovery begins.
- Emphasize the digital services along the journey – dreaming phase, clear and easily accessible information about hygienic safety and services at destination, flexible and easy-to-understand terms on reservation and purchase.
- Listen to the customer and learn how the traveller needs are changing.

→ Focusing on the customer and ensuring reliable, transparent, sustainable services – value for money!

Source: TRAVEL 2040 - Sustainability and Digital Transformation as Recovery Drivers, Euromonitor July 2020
Traveller needs in the new normal

- **Customization** and **personalization** are key cornerstones of the trip
- Travellers now place a higher premium on **problem solving and support**, especially for longer journeys
- Travellers want more control over their travel, and **tailored travel experiences** win out over pre-packaged leisure travel options
- Consumers are opting for **fewer holidays but with longer stays**

→ Signs of leisure travel are slowly emerging in places where **natural parks, beaches** and **outdoor spaces** are safely accessible and supported by testing and tracing measures.

→ Travellers are trying to find their way and make the most of what they can to fulfil their holiday needs – **traveller confidence** is the single most important element.

Trending trip types for nature-oriented travellers

- Most of the pre-covid trends in adventure travel are most likely to accelerate in the new normal
- Sustainability and pure nature, tailor-made activities and services, wellbeing and transformational experiences in focus

Finland will have new opportunities with these trends accelerating and the nature travel segments growing

**Global Outlook**

### Hot Trending Trip Types

- “Hot” trip types are in high demand

1. Custom Itineraries
2. Remote Destinations/Trails
3. Green/Sustainable Itineraries
4. Family/Multi-Generation
5. Expert or Specialist-Guided Trips
6. Long Haul/Overseas Travel
7. Slow Travel Itineraries

### Warm Trending Trip Types

- “Warm” trip types are in demand

1. Electric-Bike Itineraries
2. Women-Focused
3. Multi-Sport Itineraries
4. Self-Guided
5. Wellness and Mindfulness Itineraries
6. Culinary-Focused Adventures
7. Solo Travel
8. Off-Peak Travel (Shoulder Season)
9. Domestic/Regional

**Source:** ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
Travel motivations for nature-oriented travellers

- New experiences in safe and pure environment with room to roam
- Experiencing and getting to know local cultures and lifestyles
- Wellness in body and mind – counterbalance for work through silence and mindfulness, physical activities and luxury experiences in nature

### Hot Trending Consumer Motivations for Adventure Travel in 2019

- 1. New Experiences
- 2. To Travel Like a Local
- 3. Cultural Encounters
- 4. Wellness/Betterment Goals
- 5. Adventure Travel as a Status Symbol

### Warm Trending Consumer Motivations for Adventure Travel in 2019

- 1. Digital Detox (Unplug)
- 2. Pampering and Luxury
- 3. Adrenaline Rush/A Challenge

Source: ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
Entering the “next normal”

- Interest towards the Nordic countries was on the rise already pre-covid, and the image of spaciousness / room to roam and pure, beautiful nature are most likely to increase the interest even further
- After lockdowns and restrictions, consumers are looking for new authentic experiences, wellbeing through nature as well as tailor-made services
- Nature traveller segments seem to grow

Great new opportunities also for Finland!