

A scenic sunset over a body of water with large rocks in the foreground. The sun is low on the horizon, creating a bright orange glow and reflecting on the water. The sky is filled with colorful clouds in shades of orange, pink, and purple. The foreground features large, dark, wet rocks.

Webinar: COVID-19 - Outlook on tourism industry in the US during and after the outbreak

19.5.2020

Heli Mende

Head of Visit Finland North America
Visit Finland | Business Finland



Main topics

- Update on the market
- Visit Finland actions on the market
- Greetings and opinions from the US travel trade
- Vision: What happens after the coronavirus?
- Opportunities and trends





Tarja Koivisto

Account Manager
Visit Finland | Business Finland



Marjaana Saukkonen

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Agenda

- 1. Opening and welcome words | Mervi Toivonen, Head of Visit Finland Global Sales Promotion**
- 2. Current situation in the US | Heli Mende Head of Visit Finland North America**
- 3. Consumer sentiments and future scenarios | Katarina Wakonen, Business intelligence manager, Visit Finland**
- 4. Travel Advisor perspective | Lene Minyard, Perfectly Planned Journeys**
- 5. Comments from the trade, interviews with Rainer Jenss, Founder & President of Family Travel Association and Iris Serbanescu, Director Partnerships, TourRadar**
- 6. Visit Finland B2B plans in the US 2020, preliminary plans & vision 2021, trends and opportunities | Heli Mende, Head of Visit Finland North America**
- 7. Q&A | Tarja Koivisto, Account manager, Visit Finland**



Mervi Toivonen

Director, Head of Global Sales Promotion
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Heli Mende

Head of Visit Finland North America
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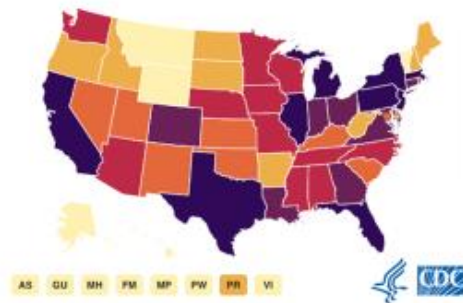
Current situation in the US

General Information

Cases & Deaths by State

29 states report more than 10,000 cases of COVID-19.

This map shows COVID-19 cases and deaths reported by U.S. states, the District of Columbia, and other U.S.-affiliated jurisdictions. Hover over the map to see the number of cases and deaths reported in each jurisdiction. To go to a jurisdiction's health department website, click on the jurisdiction on the map.



Jurisdiction	Total Cases	Deaths
New York	347,936	25,168
New Jersey	146,304	10,356
Illinois	84,191	4,177
Massachusetts	86,010	5,797
California	78,829	3,261
Pennsylvania	62,534	4,416
Michigan	51,742	4,891
Texas	47,384	1,336
Florida	45,588	1,973
Maryland	38,804	1,792
Georgia	37,642	1,606
Connecticut	37,419	3,606
Louisiana	34,498	2,491
Virginia	31,740	1,014
Ohio	27,823	1,625
Indiana	27,778	1,751

- **50 states - 50 recoveries:** Majority (48) of the states are slowly reopening but there can be big differences in covid-19 numbers as well as in the restrictions in different states and even within the states.
- **Pharmaceutical (medicine / vaccine) solution is the key.**
- **Election year in the US.**

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New York

- Some areas in central and upstate New York have met all seven metrics required to begin phase one of the [state's regional phased reopening plan](#) and have begun reopening.
- In the first phase these sectors will be reopened: construction, production, farming, fishing and retail with curbside pick up. The indicators are closely monitored and restrictions resumed if needed.
- NYS on PAUSE will continue through May 28 for regions that have not started reopening; a region can enter Phase One of reopening as soon as it meets its required metrics.
- New York City is still the epicenter but numbers are declining.
- New York State has doubled testing capacity to reach 40,000 diagnostic tests per day, and has more than 700 testing sites. Governor Cuomo issues Executive Order mandating all nursing home staff be tested for COVID-19 twice per week.
- Testing is free for all eligible New Yorkers as ordered by a health care provider.
- New Yorkers are required to wear mask and maintain 2 feet distance.
- Schools closed, unclear how the schools will open in the fall.

Current situation in the US

General Information

California

- California has introduced a 4-phased plan to reopen the states economy starting on May 8. In order to move to a more open phase, counties need to meet a certain set of requirements as Covid-19 cases start to level down.
- Most of California counties have moved to phase 2, with the exceptions of some hard-hit San Francisco Bay Area counties. Phase 2 includes opening lower-risk workplaces, allowing some non-essential retail to open for curbside pickup, childcare, manufacturing and logistics.
- Phase 3 would mean that higher risk businesses and venues could reopen with social distancing guidelines. Entering phase 3 is weeks not months away as the severity of the coronavirus pandemic is declining and the state is ready to further relax the stay-at-home order.
- The governor suggested sporting events without spectators may resume as early as June and people could be attending small church meetings and visiting hair salons in a few weeks.
- California counties are easing restrictions in different degrees, with the most affected counties in the San Francisco Bay Area and Los Angeles still holding on to shelter-in-place indefinitely.
- Counties have different policies on keeping beaches and parks open, but it is encouraged that people don't travel beyond 5-mile radius for outings.
- Silicon Valley tech companies were front-runners in sending people to work from home, and many have stated that their employees can work from home even if shelter-in-place order will be lifted.



Current situation in the US



Travel bans

- The CDC has a strong warning against any nonessential travel within the United States. The CDC website advises, “It is possible that some state and local governments may put in place travel restrictions, stay-at-home or shelter-in-place orders, mandated quarantines upon arrival, or even state border closures while you are traveling.”
- The U.S. State Department advises against any international travel, suggesting United States citizens either remain in place or return home. It’s at “Level 4,” the department’s highest warning. But it is a recommendation, not a requirement. Additionally, the U.S. has strict restrictions on arriving visitors including a ban on tourist visitors from all of Canada, Mexico, Europe and much of Asia.

Flight situation

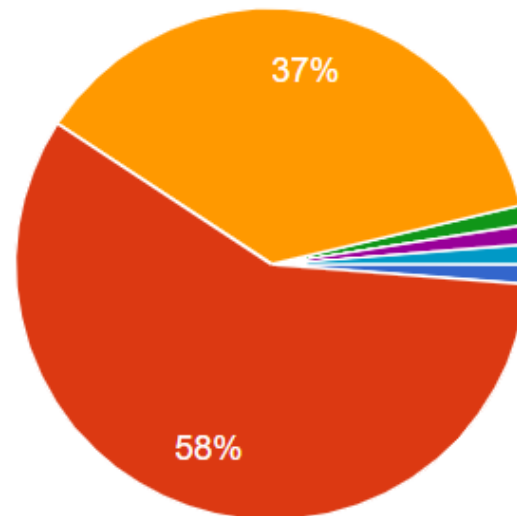
- Finnair: currently no flights to US, resuming flights in August HEL-NYC-HEL
- BA: has been operating some flights to LHR
- American Airlines: has been operating DFW- TYO, LHR and MEX, resuming more connections to Europe this summer.
-> Future gateways for Finland: LHR (BA), MAD (Iberia)?
- SAS: currently no flights to US, unclear when resuming operation
- Icelandair is currently operating KEF-BOS-KEF

Current situation in the US

Travel trade

When it comes to your priority in recovery, are you focusing on...

81 responses



Respondents

Tour operator primarily FIT 29.3 %
Tour primarily escorted tours 26.8%
Travel agency 34.1%
Different niche operators 9.8%
American 90 %
Canadian 10%

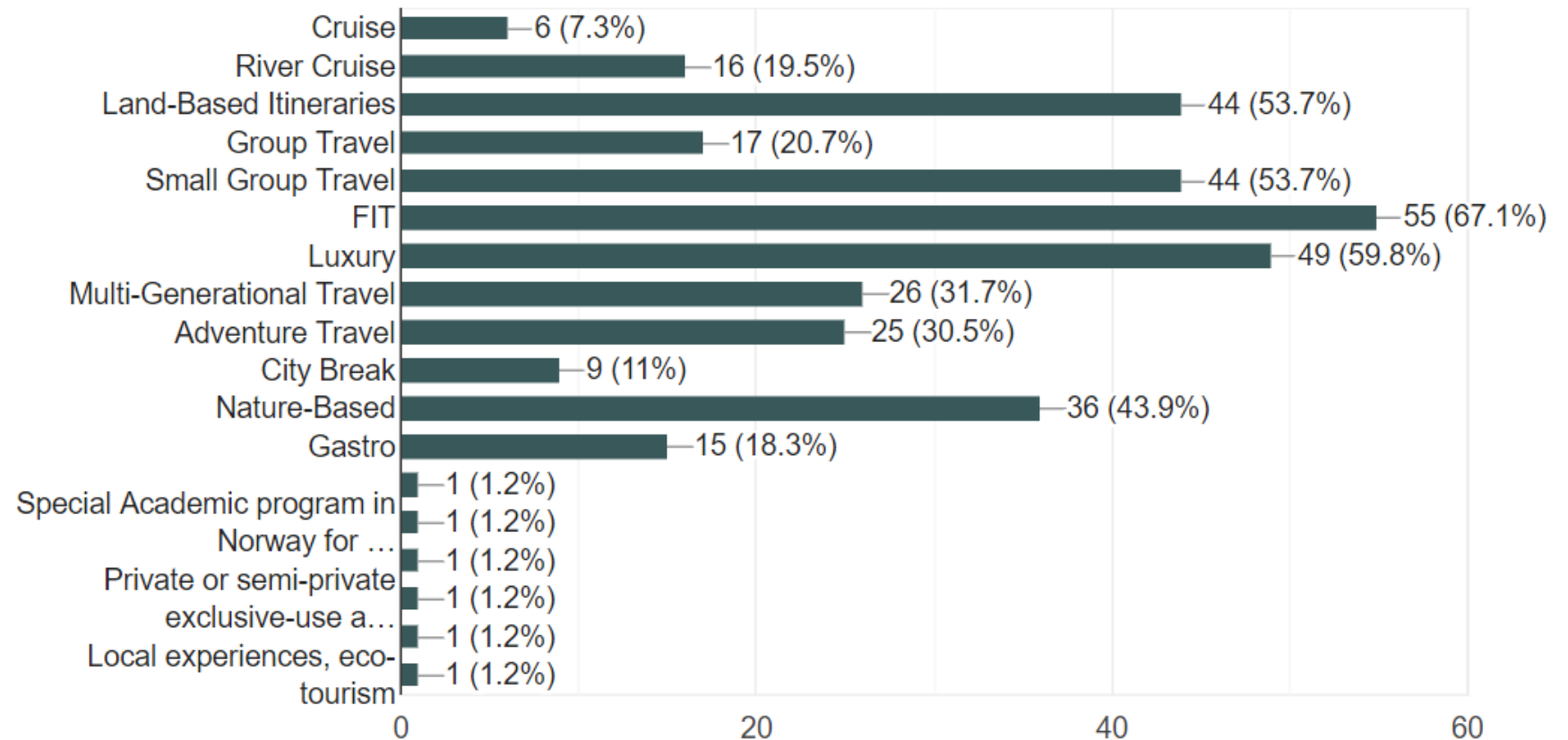
Current situation in the US

Overall, a huge shift from groups to FIT. 67% report prioritizing FIT bookings. 59% report focusing on luxury. 54% focusing on small group travel. Only 21% will focus on traditional group travel and only 11% will focus on city breaks .

Travel trade

Which types of travel do you imagine prioritizing once borders open up again?

82 responses

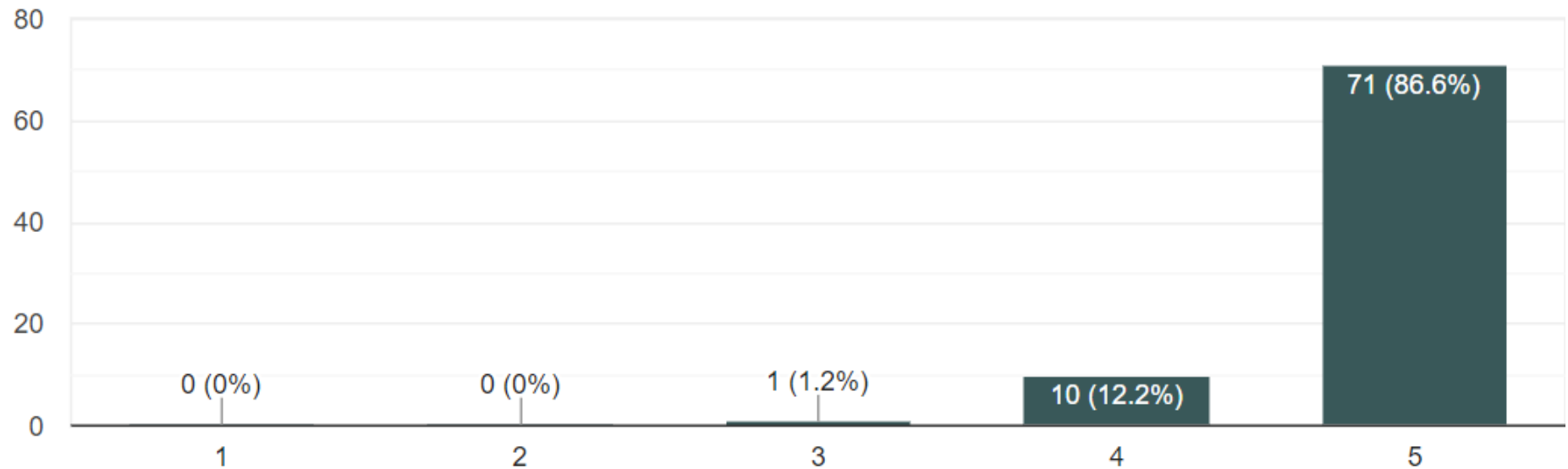


Current situation in the US

Travel trade

How important do you think cleanliness/sanitation will be for your clients once they can travel again?

82 responses

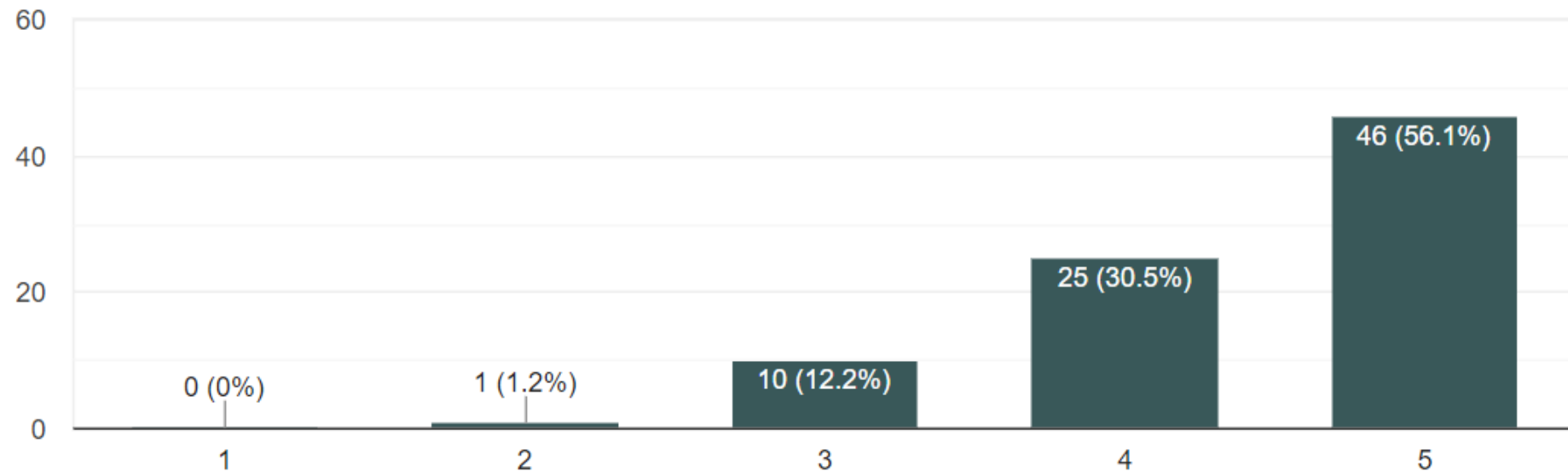


Current situation in the US

Travel trade

How likely do you think your clients will want to avoid crowded places when traveling post COVID-19?

82 responses



Current situation in the US

Travel trade

Will you focus on selling only specific destinations once travel opens up again? How will you determine which destinations?

“More of a focus on domestic destinations at first. Then various destinations where we can have exclusive, private visits, and the health of our travelers is ensured.”

“Obviously, destinations must be open and perceived as safe. Such destinations will create demand, and we plan to be ready as they come back on line. Eventually, when our full compliment of destinations will be up and running, (new-)normal will set in.”

“Sell what is safe.”

“It depends on which countries will admit Americans.”

“We are planning to promote regions out of the beaten track as clients may be afraid to travel to big cities.”

“We will continue to sell all of our usual destinations, as long as they are open for foreign travelers.”

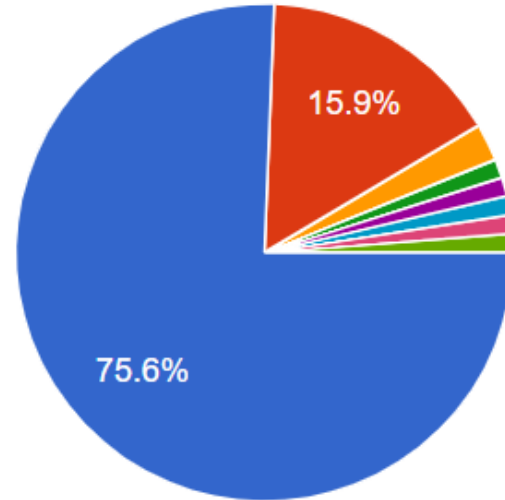
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Current situation in the US

Travel trade

When travel opens up again, do you see a specific opportunity for the Nordic countries? By Nordics we mean Denmark, Sweden, Norway & Finland.

82 responses



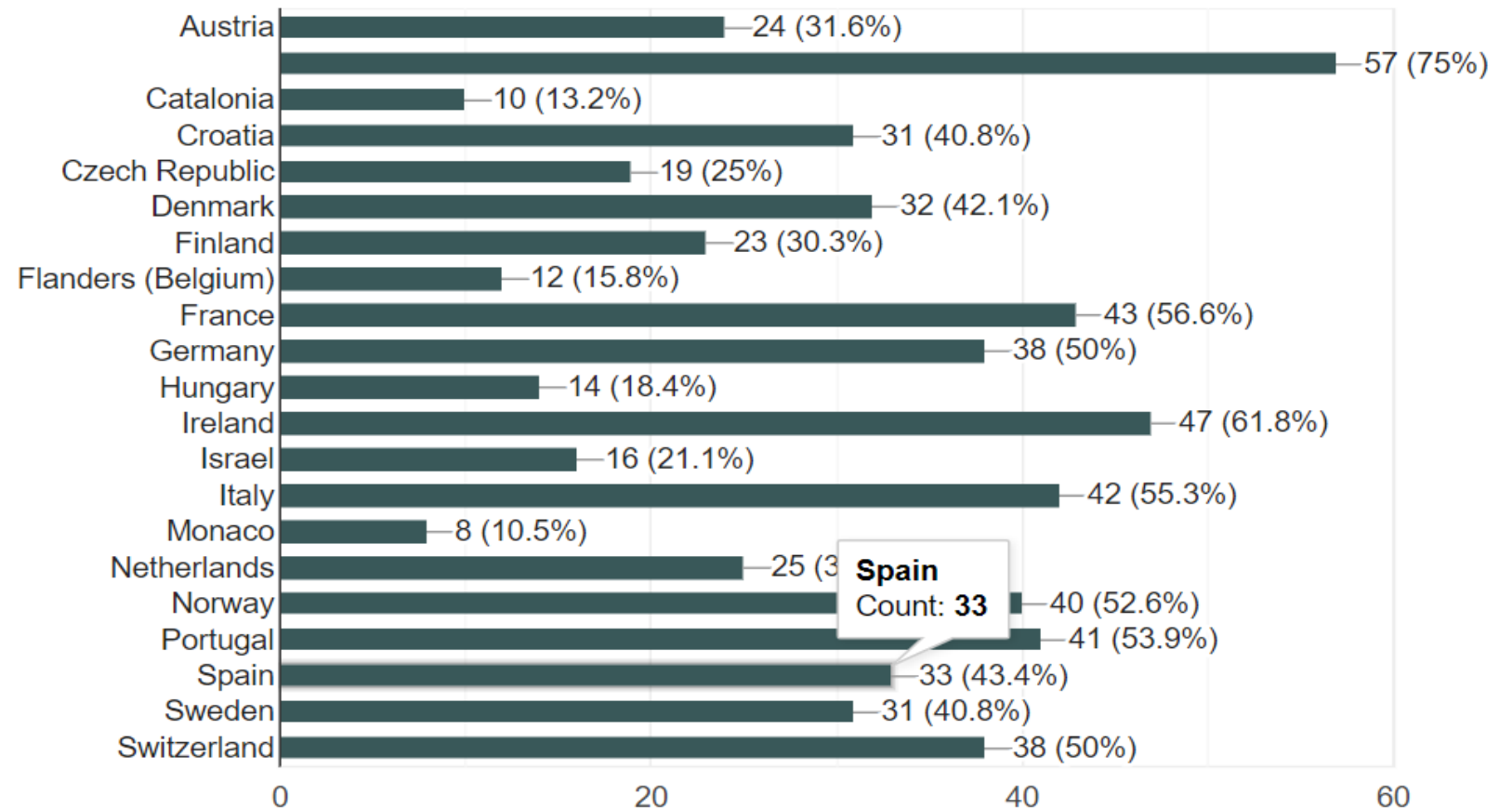
- Yes
- No
- It's not a region that we know
- Possibly, but that would be a new market for us
- We would possibly consider Nordic countries and Brussels.
- Can play up low COVID activity in this...
- Yes - Airlines that are committed to ne...
- I have no reason not to but it will depe...

Current situation in the US

Travel trade

When travel opens up again, which destinations do you imagine prioritizing? Please select all that apply.

76 responses



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Current situation in the US



Travel trade

- Tour operators have been rebooking tours to 2021.
- Majority of the customers are waiting to see what happens, but some new bookings for 2021. Last minute bookings expected.
- Majority of Europe tours have been rebooked, not cancelled or to other destinations.
- “Hard core “ special interest groups are willing to travel Q3-Q4 internationally if safe and allowed.
- New bookings for tours in Americas mainly, beach holidays.
- Information and guidelines expected from destinations and suppliers: **“Best practises for future travel”**
 - When is travel to the destination possible? Is the destination ready to welcome back? What is the resident sentiment towards travellers?
 - What safety regulations and sanitazion protocols are implemented or planned in the destination (hotels, transportation, restaurants, other services). Masks? Crowd control at major sites?
 - What has changed in the destination? Are the same services available as before crisis? Honesty and transparency is important.
 - Flexible cancellation and change policies (same policies for everyone).
- Revised terms & conditions

Current situation in the US

The U.S. Travel Association: “Travel is vital to the U.S. economy and jobs recovery. The travel industry in America, the association says, is critical to boosting the U.S. economy even as it predicts, “travel industry losses will result in a GDP impact of \$1.2 trillion in 2020.”

U.S. Travel Industry Releases Guidance for “Travel in the New Normal”

- Task force of physicians and travel leaders authored health-focused travel guidance across all segments of travel
- <https://www.ustravel.org/press/us-travel-industry-releases-guidance-travel-new-normal>
- The “Travel in the New Normal” guidance is focused on six main areas, with the document providing specific examples for each:
 - Travel businesses should adapt operations, modify employee practices and/or redesign public spaces to help protect employees and customers.
 - Travel businesses should consider implementing touchless solutions, where practical, to limit the opportunity for virus transmission while also enabling a positive travel experience.
 - Travel businesses should adopt and implement enhanced sanitation procedures specifically designed to combat the transmission of COVID-19.
 - Travel businesses should promote health screening measures for employees and isolate workers with possible COVID-19 symptoms and provide health resources to customers.
 - Travel businesses should establish a set of procedures aligned with CDC guidance should an employee test positive for COVID-19.
 - Travel businesses should follow best practices in food and beverage service to promote health of employees and customers.



Katarina Wakonen

Manager of Business Intelligence
Visit Finland | Business Finland





Consumer sentiments and future scenarios

Webinar: COVID-19 –
Outlook on tourism industry in the US during and after the outbreak

Katarina Wakonen



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Spring 2020 & Updating scenarios

When previous worst cases turn into best scenarios in next month's updates

UNWTO, Barometer Jan 2020

Based on current trends, economic prospects and the UNWTO Confidence Index, UNWTO forecasts a growth of 3% to 4% in international tourist arrivals worldwide in 2020.

UNWTO, 6 Mar 2020

UNWTO has revised its 2020 prospects to a **negative growth of 1% to 3%**, translating into an estimated loss of US\$ 30 to 50* billion in international tourism receipts.

UNWTO, 7 May 2020

the crisis could lead to an annual **decline of between 60% and 80%** when compared with 2019 figures. This translates into a loss about US\$80 billion in receipts (exports from tourism).

*29-45 mrd €. UNWTO underscores that any estimate must be treated with caution and is likely to be updated

Survival of the travel industry?

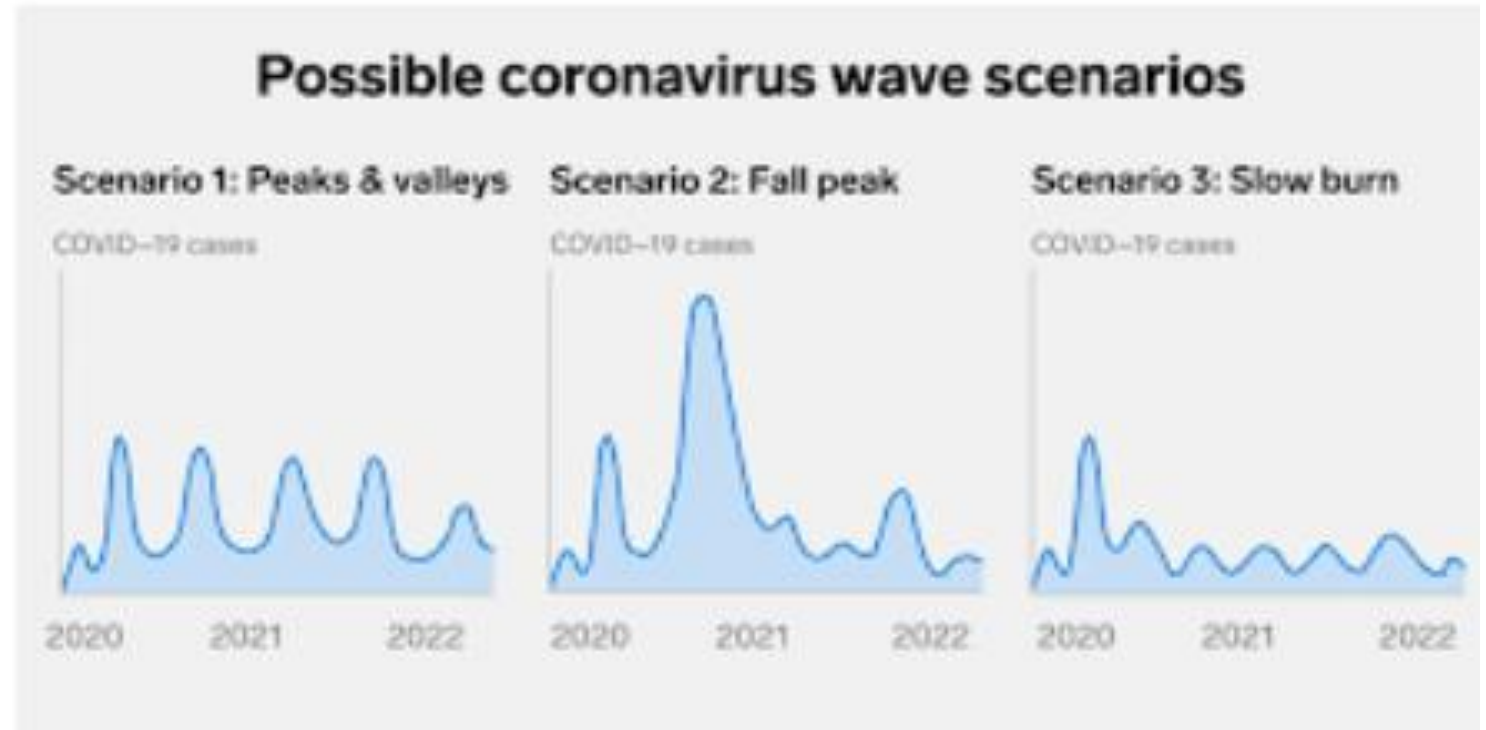
Climate concerns
Health concerns (Covid-19 pandemic)



Speculation on the future of coronavirus

Depends on:

- *Characteristics* of the virus
- Preventive *measures* taken after first wave:
 - testing and tracing,
 - lockdowns?
- *Vaccine* development
- *Luck* - Nobody knows (lot of uncertainty)



This 'new normal' is expected to last until a vaccine for the pandemic is found.

Meanwhile, we have to live and travel with social distancing.



Projection for progress of the first wave in the USA

United States of America ▼

Daily infections and testing ⓘ

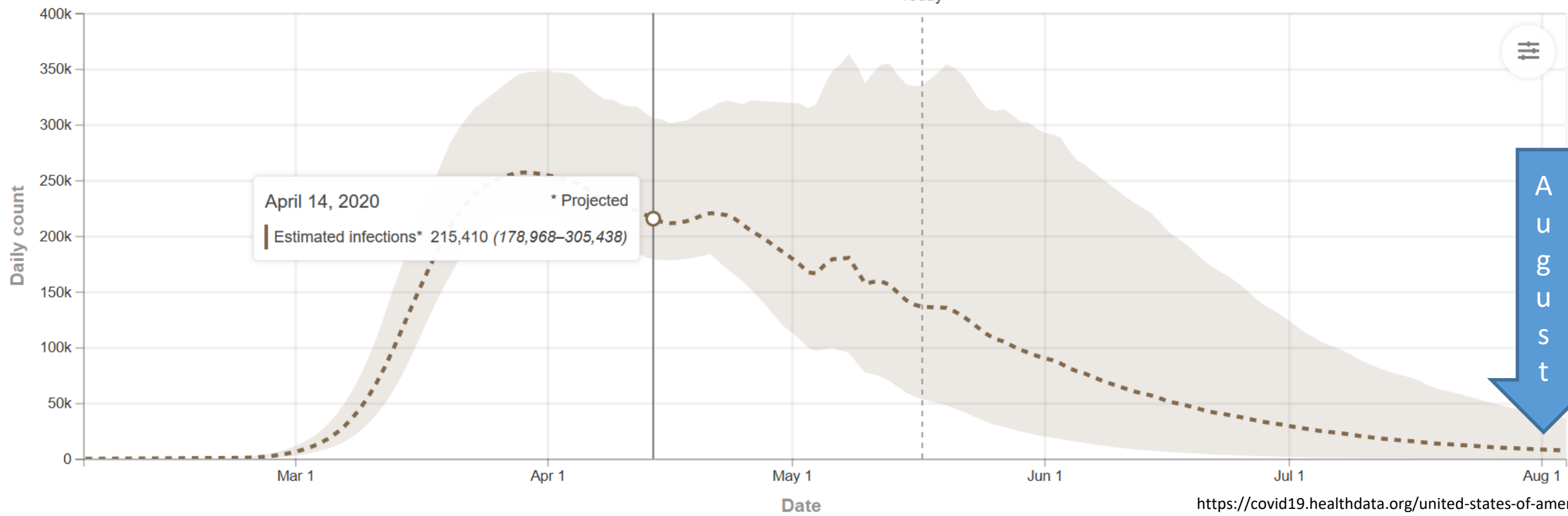
All

Estimated infections

Confirmed infections

Tests

Today



COVID-19 has Impacted the World's Top Economies



Countries	Confirmed Cases	Cases per Million Capita	Deaths	Case Fatality Rate	Stimulus (\$ Billion)	Stringency Index	Active Jobs (30 Day Change)	Market Index (YTD Change)	GDP Growth (2020 Estimate)
United States	1,390,734	4,202	84,133	6.0%	4,984	73.57	-9.2%	-11.8%	-5.3%
China	82,929	58	4,633	5.6%	368	62.86	-10.1%	-4.3%	0.8%
Japan	16,049	127	678	4.2%	1,098	56.19	-19.2%	-12.0%	-4.7%
Germany	174,098	2,078	7,861	4.5%	1,231	67.38	-13.4%	-20.6%	-6.6%
India	78,121	57	2,551	3.3%	266	77.62	-27.5%	-19.4%	2.1%
United Kingdom	230,985	3,403	33,264	14.4%	446	69.05	-15.2%	-22.2%	-7.6%
France	178,184	2,730	27,077	15.2%	455	92.38	-12.1%	-26.3%	-8.3%
Italy	222,104	3,674	31,106	14.0%	861	65.24	-27.3%	-28.8%	-9.4%
Brazil	190,137	895	13,240	7.0%	149	77.62	-16.8%	-54.0%	-3.2%
Canada	73,568	1,949	5,425	7.4%	142	76.43	-9.9%	-15.1%	-6.0%

Note: Case Fatality Rate is the ratio of total death to total confirmed case. Market Index data is based on MSCI index of respective country. GDP growth estimates are based on consensus data from various analysts and firms.

Stringency index, created by Oxford COVID-19 Government Response Tracker (OxCGRT), is the aggregated score based on several different common policy responses governments have taken, such as school and workplace closures and restrictions on travel and gatherings etc.

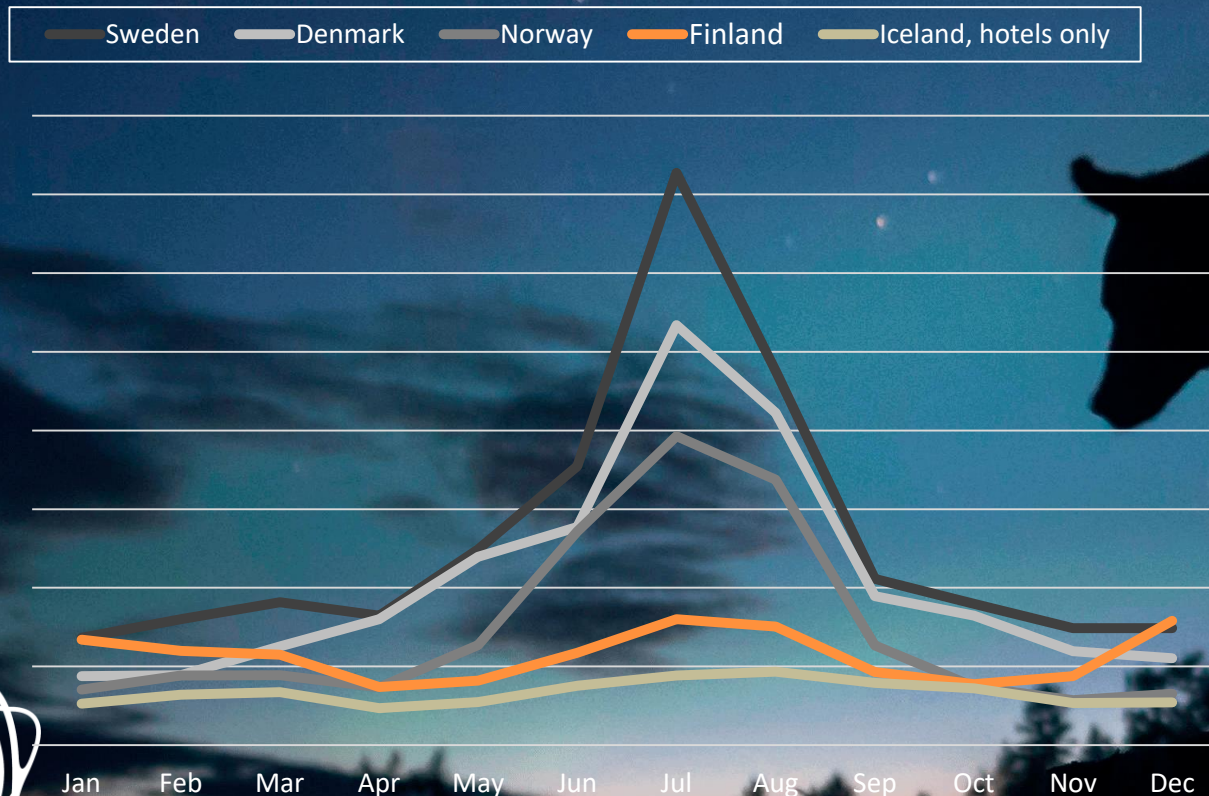
Source: GlobalData Analysis; Press Articles; 2019 Novel Coronavirus COVID-19 (2019-nCoV) Data Repository by Johns Hopkins CSSE; World Health Organization; Trading Economics; Investing.com; Bloomberg; Oxford COVID-19 Government Response Tracker (OxCGRT).

Balancing between health and economy

Importance of the summer holiday for most destinations

- Finland stands out more as a winter destination

Monthly overnights in the Nordic countries



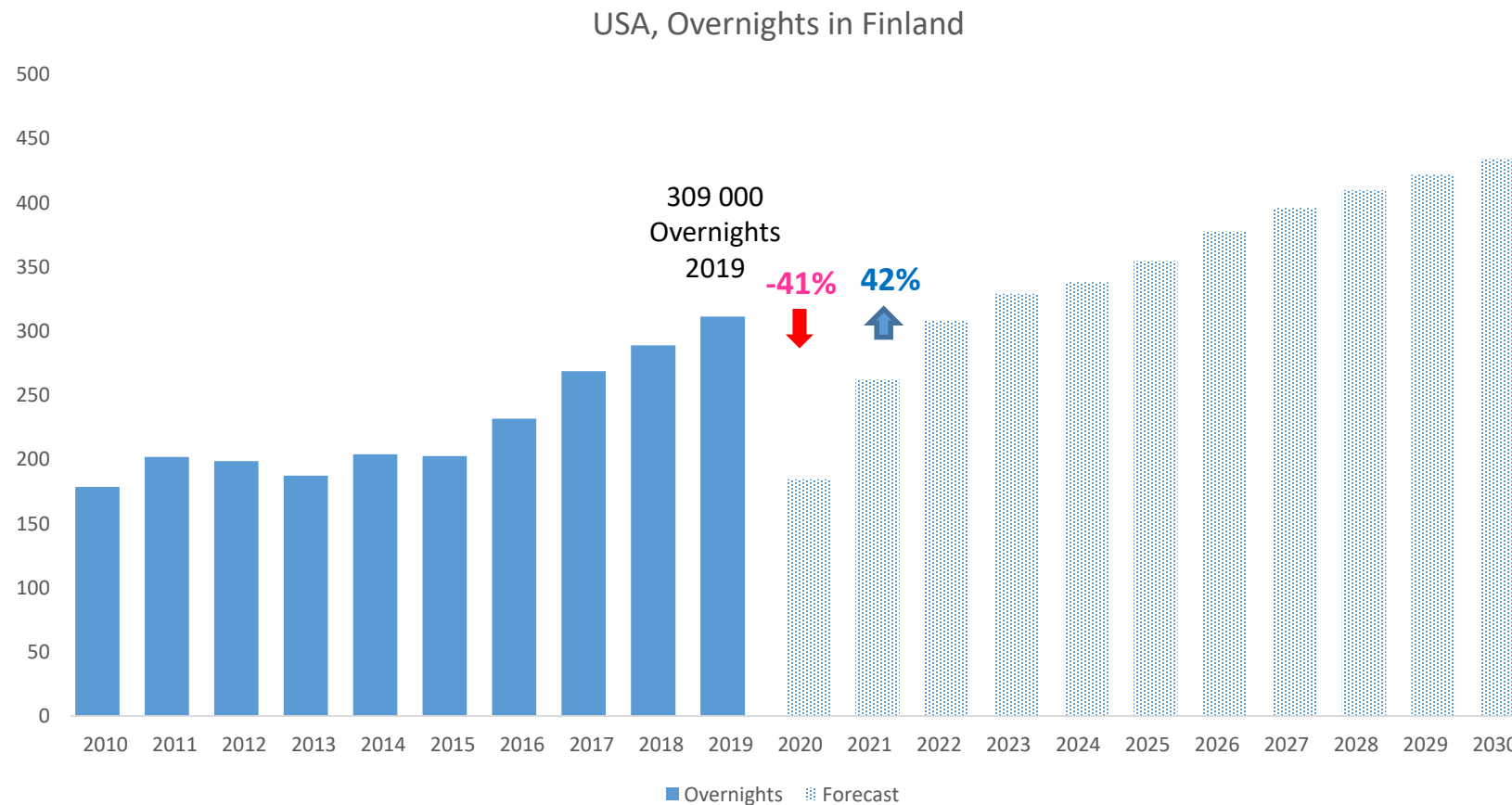
EU commission presented a Package on how to resume travel and reboot Europe's tourism (13.5.)

Europe's tourism sector employs 22.6 million people, equivalent to 11.2 percent of total EU employment, and accounts for 9.5 percent of the bloc's economy



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USA: Recovery to 2019 level earliest 2022

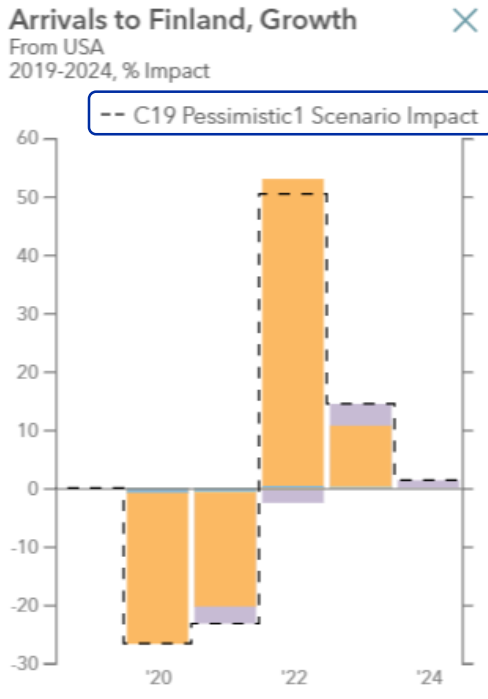
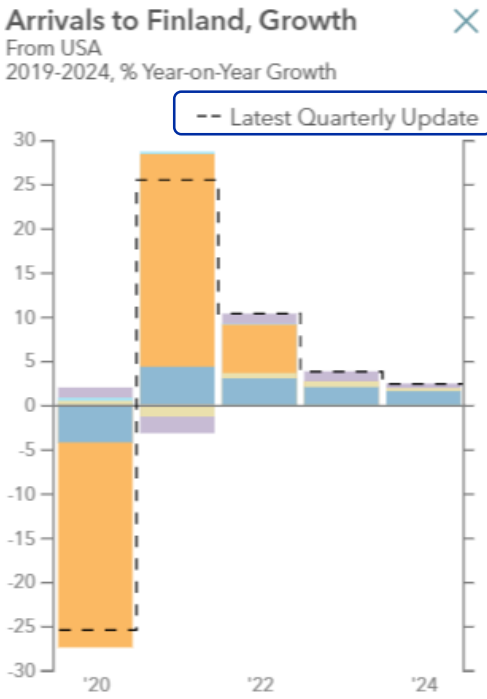


COVID-19 IMPACT: OUTLOOK ON TRAVEL FROM USA TO FINLAND

- BASELINE & PESSIMISTIC1



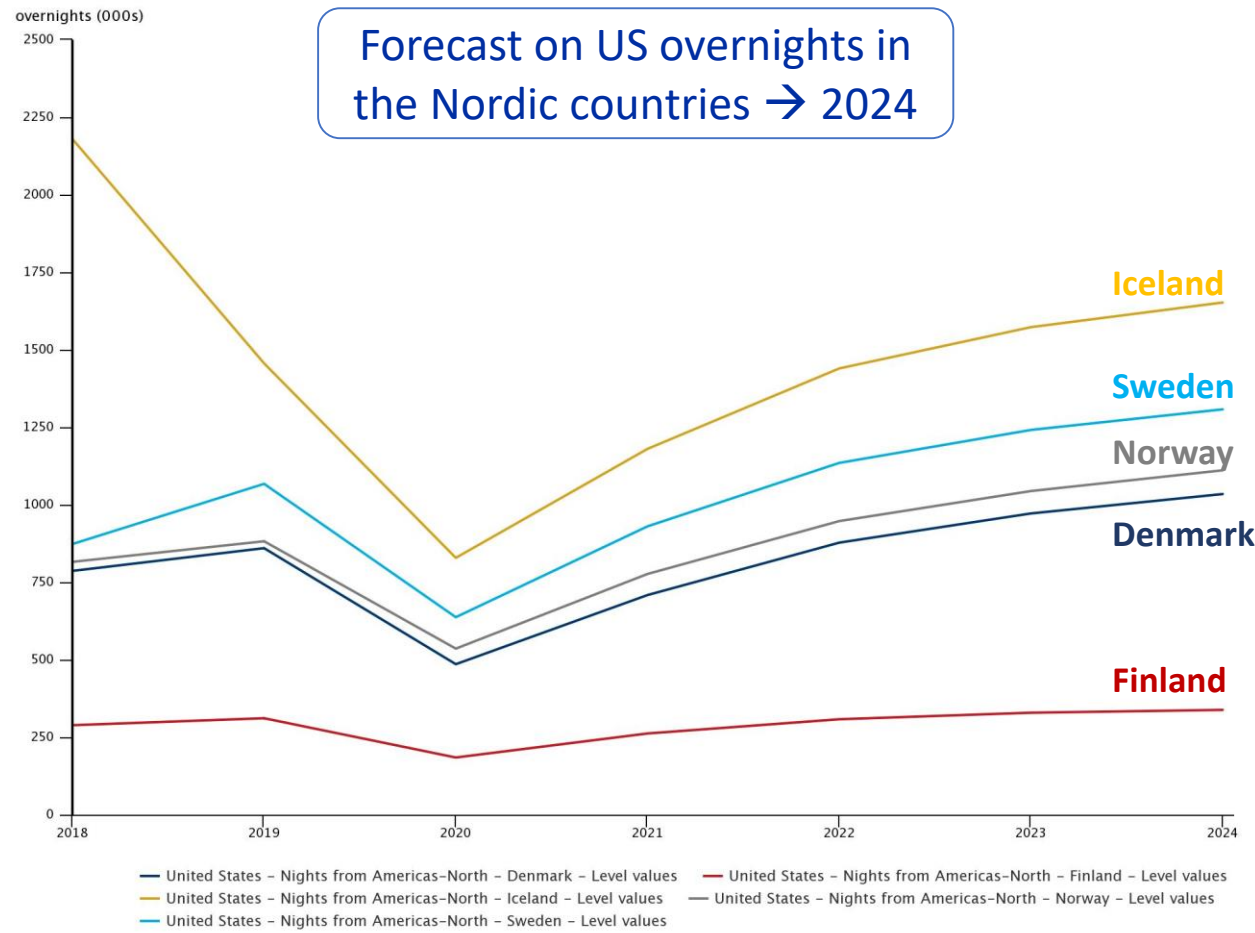
Source: Euromonitor International



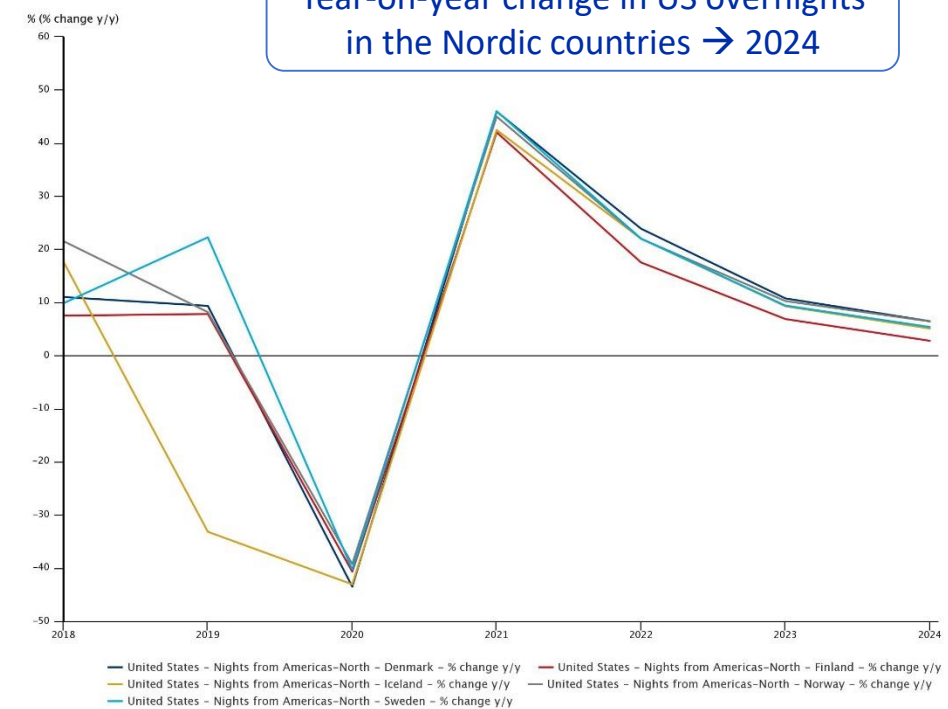
- DRIVER EFFECTS (%):**
- Source country push-drivers**
Population growth, GDP per capita, High income households (%share)
 - Destination pull-drivers**
Population growth, GDP per capita, Relative price level, Relative exchange rate, Climate attractiveness, Sport/Culture Events
 - Destination risk factors**
Terrorism events, Natural disasters, Political stability, Armed conflicts
 - Bilateral**
Trade intensity, Currency union
 - Other**
Habit persistence, Substitution effect, Oil price, Model Residuals/Manual Adjustments

COVID-19 IMPACT: OUTLOOK ON TRAVEL FROM USA TO THE NORDIC COUNTRIES

Selection - 18 May 2020 16:29:35



Selection - 18 May 2020 16:29:35



Source: Oxford Economics

Market Insight



Visit Finland

From mass tourism to social distancing?

"So, if there is an opportunity for the industry to redirect itself and change the face of future holiday products, it is now."

"But whether we have really moved away from mass tourism as we knew it after the coronavirus crisis remains to be seen."

"The current discussion in the industry is more in the direction of quality-oriented tourism."

Ulf Sonntag, NIT



When thinking about Finland, the beauty of the country spontaneously comes to mind in the US. As do the Finnish people, the food, the northern lights and the capital

Spontaneous Impressions - Finland



*They are known for their
ski resorts, lakes, wild
reindeer, and Northern
Lights.*

Finland is a freezing cold country that has a lot of nature and outdoor activities to offer

I also think of Northern Lights in Finland, though I love the culture and stories that they have about why the northern lights come. I think of delicious food and friendly people.

*Cold, mountains,
snow.*

Mountains and skiing with a lot of cold

*I think of moose, I
think of snow and
beautiful landscapes*

Aurora borealis, Helsinki with its markets and restaurants, the seawall, and history. Biking, hiking, and natural beauty.

*It was quiet and peaceful.
Lots of green everywhere.
A wonderful place to go
on long walks.*

I think of beautiful outdoor scenery, tourist attractions, historical monuments, delicious food and really pleasant and kind people.

Beautiful and friendly people. Skiing, and other winter outdoor activities. Long days of sunlight. Clean, fresh air.

*Beautiful,
expensive*

*I think it would be
clean, colourful,
pleasant, friendly,
and a nice place to
relax*

I think it has a lot of attractions, places to see, historic areas and nice scenery.

Northern Lights, dog sledding or reindeer sledding, winter with hardly any sunlight. Cold!

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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 (458)

SEARCHES GLOBALLY

Finland0s top brandtags

Top Micro-Brandtags	Growth
1. Tourism	+2,2%
2. Northern Lights	+49,1%
3. Travel	+19,3%
4. Saunas	+43,3%
5. Places to Visit	+15,9%
6. Igloos Ice Hotels	+34,3%
7. Cities	+17,2%
8. Santa Claus	+21,2%
9. Holiday Packages	+33,0%
10.Hotels	+47,8%
11.Lakes*	-7,7%
12.Camping	+41,7%


*)Please note:
There was a 52% growth in searches for Lakes in 2018 due to Expedia campaign

Source:
D2 Digital Demand



Top touristic activities in Finland remain the same, and this year are the fastest growing...

Northern Lights




#2

447.662 searches

+49,1%

Saunas




#4

296.839 searches

+43,3%

Igloos Ice Hotels




#6

242.199 searches

+34,3%

... experiencing a gain in the total digital demand market share for Finland

Northern Lights



#2

447.662 searches

+49,1%

Market share 2018


7,2%

→

Market share 2019

8,7%

Saunas



#4

296.839 searches

+43,3%

Market share 2018


4,9%

→

Market share 2019

5,8%

Igloos Ice Hotels



#6

242.199 searches

+34,3%

Market share 2018

4,3%












→

Market share 2019

4,7%



United States

	Markets	2019	Growth
	Japan	556.756	+37,3%
	Russian Federation	524.545	+15,9%
	Germany	455.265	+37,9%
	United States	402.123	+20,4%
	United Kingdom	353.340	+39,1%
	China	317.465	-16,3%
	France	248.971	+20,9%
	Italy	223.324	+21,9%
	Spain	205.899	+21,7%
	India	157.504	+33,4%
	Rest of the world	1.694.428	+24,7%

- No. 4 in ranking in absolute numbers.
- Last year, growth in the number of searches was about 20 % compared to previous year.

US travelers'

Internet searches

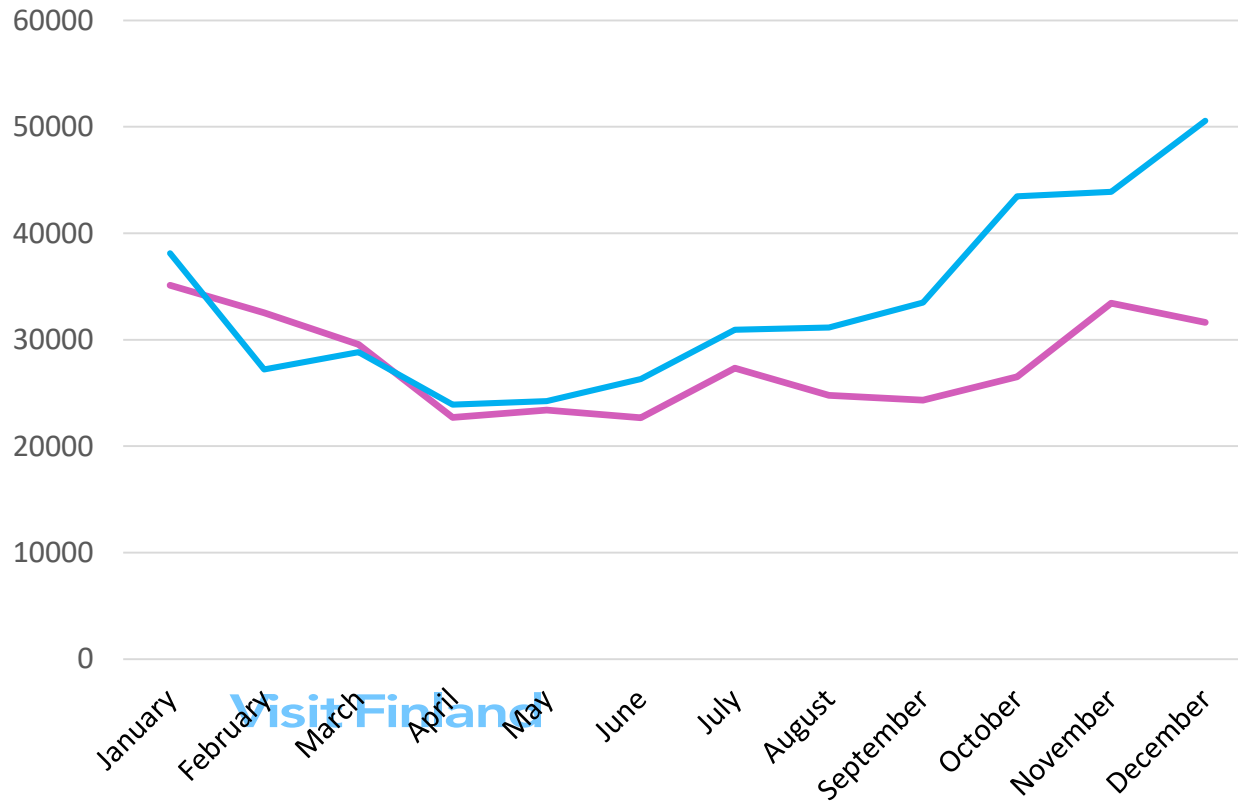
- 402 100 travel-related Internet searches concerning Finland
- +20 % compared to previous year

Source:
D2 Digital Demand



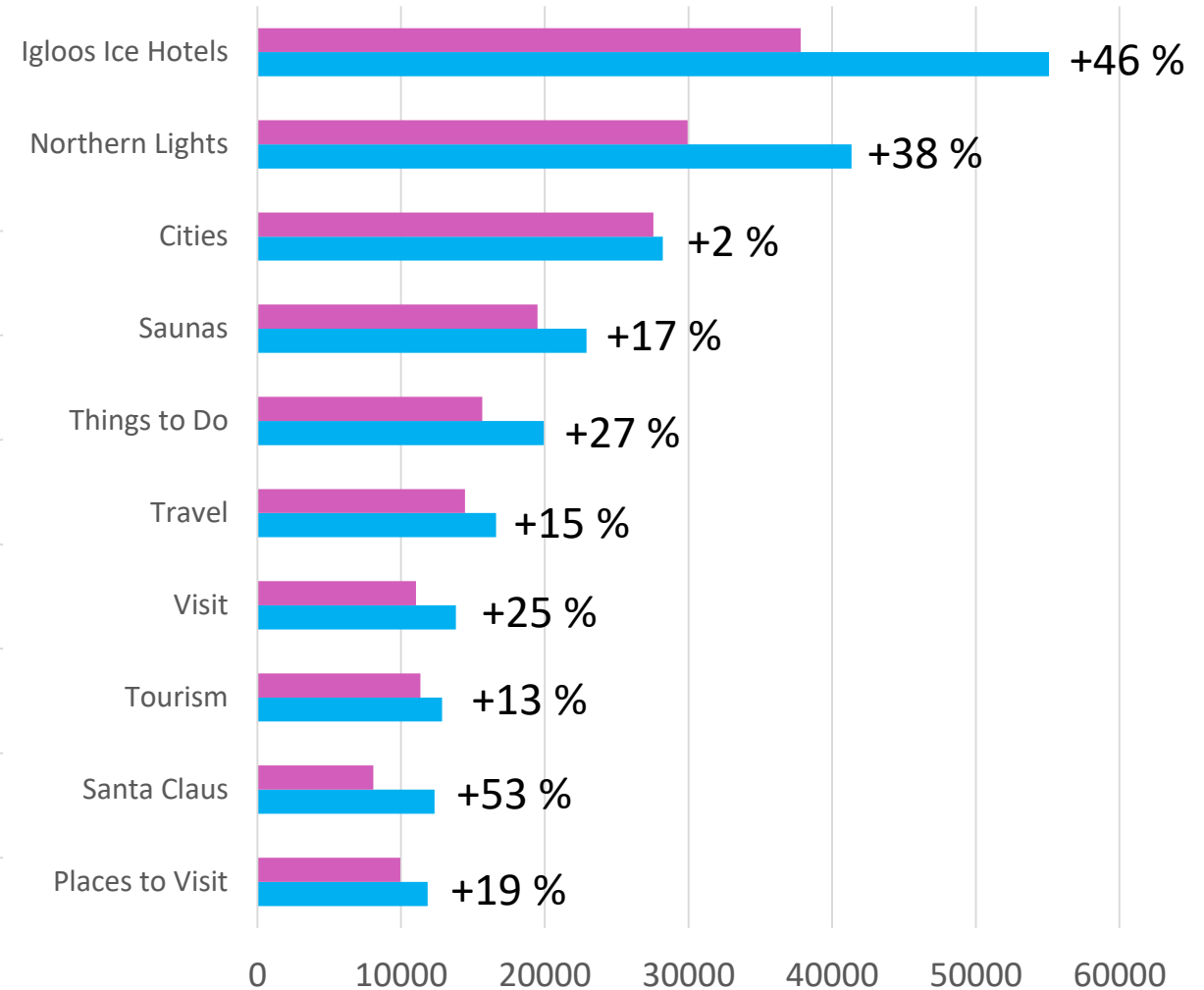
US Seasonality in Searches

— 2018 — 2019



US Top Microbrandtags

■ 2018 ■ 2019



Consumer sentiments

Covid-19 – Impacts & future trends



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HOW TRAVELLERS WILL BE DIFFERENT WHEN THEY EMBARK ON THEIR NEXT JOURNEYS.

1.Virtual is new real

- Games and virtual tours in the destinations

2.Hygiene is non-negotiable, needed always!

- Face masks are here to stay? New give-aways.

3.Contactless

- Mobile, virtual, contactless solutions (check-ins etc.)

4.Virtual humans as new normal

- No risk of getting infected

5.Social without crowding

- Demand for small group experiences and family/friend travel
- Off-the-beaten paths

6.Care as the new service

- Caring of each other, brands and companies show empathy for customers on their services

7.Value as the base currency

- Customer really benefits what they have paid
- Value is clearly communicated

Source: ATTA webinar April 9th: (posted in Teams by Virpi Aittokoski)

USA: THE LARGEST CONCERNS RELATED TO COVID-19

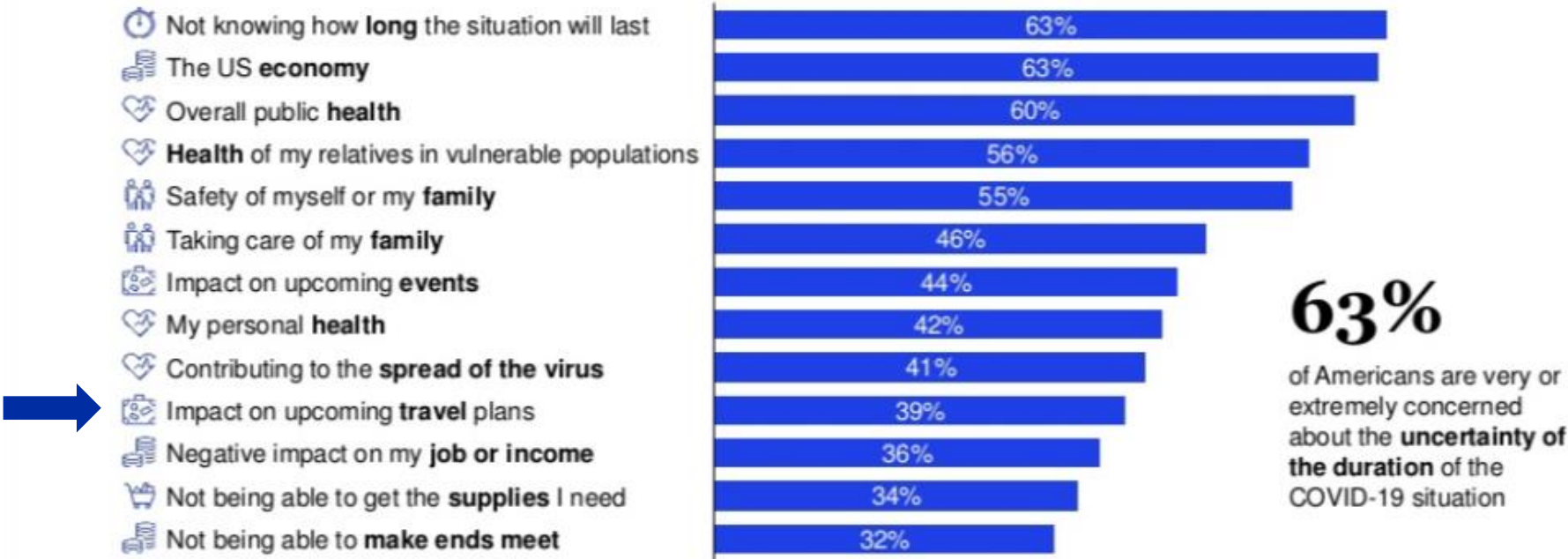


Many Americans are uncertain about the duration of the situation and concerned about the economy and public health

Largest concerns of the US population related to COVID-19¹

% of respondents who are very concerned or extremely concerned

■ Very concerned / extremely concerned



¹ Q: What concerns you most about the COVID-19 situation? Possible answers: "not a concern"; "minimally concerned"; "somewhat concerned"; "very concerned"; "extremely concerned."

Source: McKinsey & Company COVID-19 US Consumer Pulse Survey 5/4–5/10, n = 1,993, sampled and weighted to match US general population 18+ years

USA: EXPECTATIONS FOR CONSUMER BEHAVIOR AFTER COVID-19

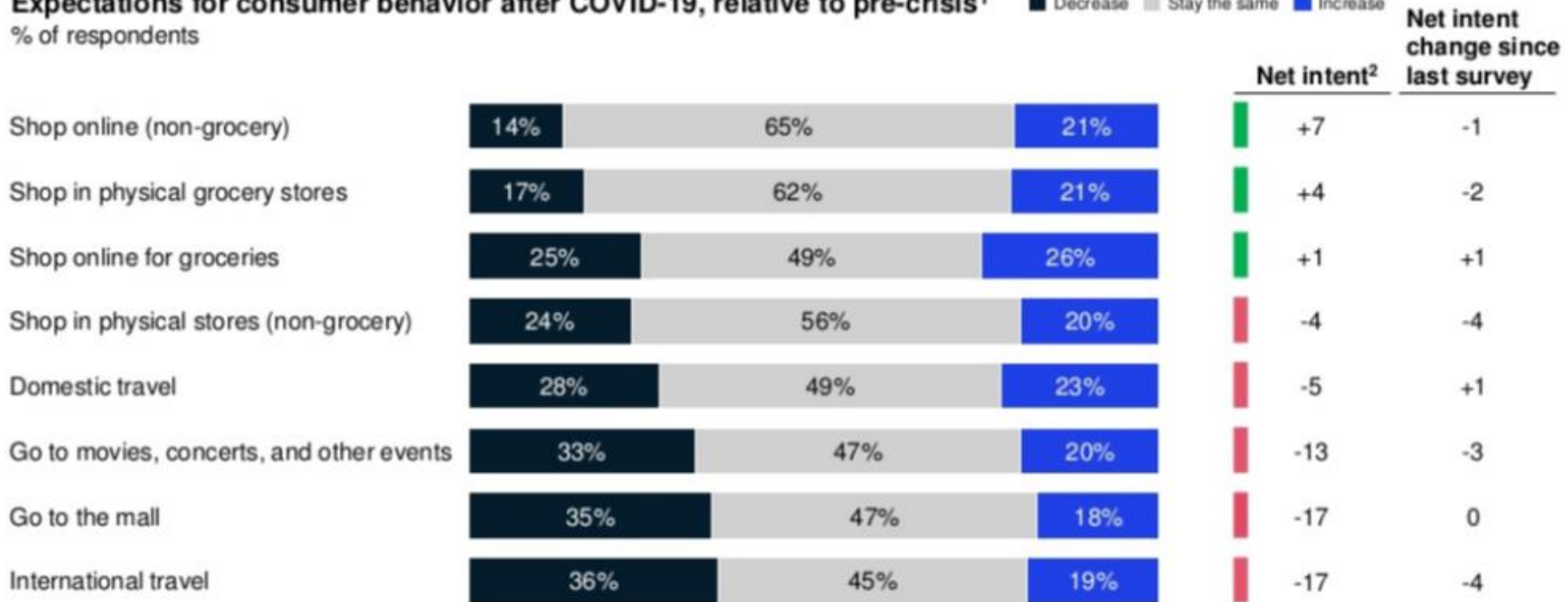
B Looking beyond COVID-19, consumers expect to reduce in-person activities such as travel, events, and mall shopping



Expectations for consumer behavior after COVID-19, relative to pre-crisis¹

% of respondents

■ Decrease ■ Stay the same ■ Increase



¹ Q: Once the coronavirus (COVID-19) situation has subsided, which of the following do you think you will do more or less compared to before the coronavirus (COVID-19) situation started? Possible answers: "will reduce this"; "will do the same as before coronavirus"; "will increase this." Excludes work-from-home category.

² Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating to increase time spent.

Source: McKinsey & Company COVID-19 US Consumer Pulse Survey 5/4-5/10, n = 1,993; 4/27-5/3/2020, n = 2,105, sampled and weighted to match US general population 18+ years

McKinsey & Company 12

Thank you!



Visit Finland



Lene H. Minyard

**Travel advisor & owner
Perfectly Planned Journeys**

“My goal is to put the human touch on your vacation to ensure that it is not “just another trip” but rather an amazing “Perfectly Planned Journey!”

Heli Mende

Head of Visit Finland North America
Visit Finland | Business Finland





General Overview – tour packages to Finland

- 41 TOs and 6 Online platforms sell Finland
- 44 TOs don't sell Finland but sell other Nordic countries
- 334 packages
 - 138 mono-destination (41.3%)
 - 196 multi-destination (58.7%)
- 35 includes flights (10.5%)

General Overview

Finland packages in the US

Abercrombie & Kent USA	Tauck	Zegrahm Expeditions	Borton Overseas
Alexander+Roberts	Contiki	Lakani World Tours	Boundless Journeys
APT	Insight Vacations	AAA Vacations	Cheeseman's Ecology Safaris
Captain's Choice	Trafalgar	Blue-roads Touring	Explore!
Collette	go-today	on the go tours	GreatGuides
Great Value Vacations	TCS World Travel	Nordic Saga	National Geographic Expeditions
Cosmos	Country Walkers	Global Journeys	Tripsite
Globus	WorldStrides Explorica	Grand European Travel	Gate 1 Travel
Goway Travel, Inc.	Railbookers	StudentUniverse	Road Scholar
Intrepid Travel	Topdeck	TourRadar	Kensington Tours
SITA World Tours	Gadventure	tours4fun	Wilderness Travel

Tour Packages geographically



233 Helsinki



155 Lapland



53 Lakeland



6 Coast & Archipelago

Mono-destination



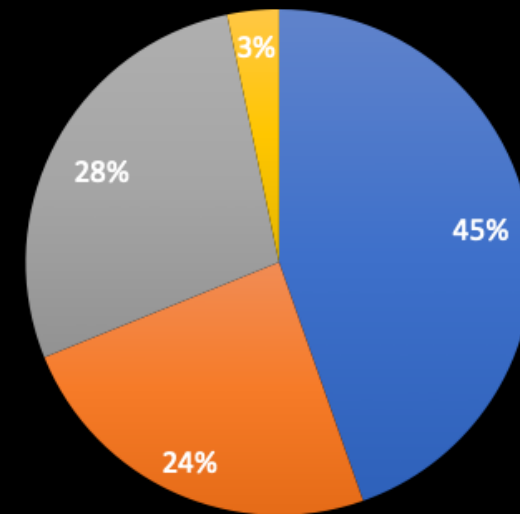
Multi-destination



Tour Packages-Length of Stay

- Average Length of stay: 3.4 nights
 - Multi-destination: 2.2 nights
 - Mono-destination: 5.1 nights
- 1-2 nights: 149 (44.6%)
- 3-4 nights: 81 (24.3%)
- 5-7 nights: 93 (27.8%)
- Over 7 nights: 11 (3.3%)

Length of Stay



■ 1-2 nights ■ 3-4 nights ■ 5-7 nights ■ Over 7 nights:

Comments and greetings from the trade

AVANTI:

- These are indeed unprecedented times – the range and scale of disruption to all our daily lives is staggering. There is no easy fix, and what the new normal is, is yet to be determined.
- Travel for now, has almost ground to a halt and our industry is trying to figure out what the future holds. **Our travel agents are looking for the light at the end of the tunnel. As customers are dealing with quarantine, we see positive signs that they are looking forward to the day when they can travel again. But, now is too early to start selling. First, airlines need to open up their international routes and governments need to establish non-quarantine procedures for international visitors.**
- **As a tour operator with our receptive DMC partners, we need to establish social distancing protocols. We understand that this will take time, but we are now busy preparing for the future.**
- **Finland might be a very interesting destination due to all the nature and wide open spaces when people start traveling again. Plus with smaller group tours, that is certainly attractive too.”**

Comments and greetings from the trade

KENSINGTON TOURS:

- Of course it's very difficult to predict how the current situation will influence travel decisions and trends in the coming months, and beyond. Given the emphasis around maintaining distance between people, **it seems entirely possible that people will be reluctant to fly initially. This could spark an interest in domestic tourism.**
- **On the other hand, there will be people who can't wait to get on a plane and make up for lost time. We expect that people might be less interested in visiting cities and more interested in coastal and nature-focused destinations, with either direct flights or as few connections as possible.**
- Once arriving in destination, there may be more interest in staying in one place as apposed to our popular multi-city/multi-country trips. Domestic flights and trains may be a deterrent for some travellers. **Since travel restrictions may not be lifted on a global scale until well into summer, this could cause an increase in demand for winter travel.**
- We don't know what will happen to the cost of airfares, but it might be the **more financially stable clients who are travelling sooner than others.**
- All of these anticipated scenarios bode well for our style of travel here at Kensington – private guided. We will continue to curate personalized experiences and execute them with our dedicated local partners.
- Whether it's summer, autumn or winter travel, **the good news is Finland is well-positioned to accommodate travelers in all scenarios, especially Lapland.**

Comments and greetings from the trade

ABERCROMBIE & KENT:

As the situation drags on, **our realistic expectation now is that Europe travel is unlikely to begin recovering until the new year, and then slowly. We have suspended operations globally until the end of June**, and we are taking a more case-by-case approach after that at present.

With the current E.U. border closure set to expire, **we are looking to see a lot of developments and indicators come out of European nations. Unfortunately, the guidelines already out (e.g. UK) are not positive for international travel, with talk of limited gathering, border controls and enforced quarantines.**

As the market does start to travel here in North America, we anticipate a large swell of domestic demand, followed by, perhaps, close-in destinations like Canada, Mexico & the Caribbean.

Of course, the massive economic upheaval **will have a lasting effect on peoples' ability to purchase longer and more distant trips with a correspondingly higher price tag. Luckily for A&K, our demographic has less of an issue with that, but for Finland as a destination it's certainly a factor to consider. Value-offerings will be key in the short-medium term.**

The outdoor, wild adventure message of Finland is a good fit for the times. We do feel people will be seeking isolation in travel, and outdoor activities that can be done without a crowd of other people. This fits in well with your existing brand propositions."

Rainer Jenss

Founder & President
Family Travel Association





Iris Serbanescu

**Director of partnerships
TourRadar**

Trends



BACK TO THE NATURE

- According to an ongoing [survey](#) of travelers by Destination Analysts, a tourism research and marketing firm, more than half of American travelers say they plan to avoid crowded destinations when they resume traveling.

PRIVACY IS THE NEW BLACK

- “One thing that’s loud and clear from our clients: Any short-term travel needs to be private,” said Jack Ezon, the founder and managing partner of [Embark Beyond](#), a luxury travel agency. “Finding a ‘hermetically sealed’ option seems to be the most responsible solution.”

HYGIENE – THE NEW AMENITY

- When travel restrictions lift and hotels reopen, travelers can expect to see housekeeping front and center in hotels. Experts foresee more touchless check-in via apps and expressions of hygiene that go beyond the paper wrap over the toilet seat.

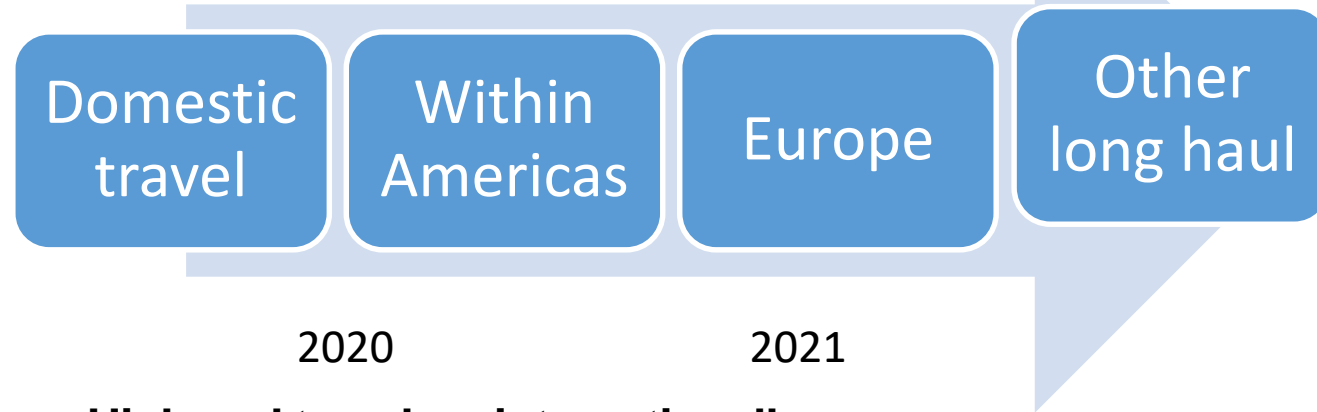
PLASTIC IS BACK...

- “The work on reduction of plastic is going to take a back seat to the larger quest for the health and security of travelers,” said Megan Epler Wood, the managing director of the [Sustainable Tourism Asset Management Program](#) at Cornell University.

LOCAL

- One possible upside of the pandemic is the awareness of how spending locally helps communities. “We are all becoming familiar with the idea of helping small businesses through Covid-19,” said Jonathon Day, an associate professor focused on sustainable tourism at Purdue University. “If we carry it into the future to places we travel, thinking about whether the money will stay in the community, that’s something we can take from this experience.”

VISION: Travel from the US during and after



CHALLENGES
SAFETY CONCERNS
REDUCED NUMBER OF DIRECT FLIGHTS
FLIGHT PRICES
FIERCE COMPETITION
HOW TO KEEP TRADE & TRAVELERS
THINKING OF FINLAND?

- **High end travelers internationally**
- **Older people reluctant to travel internationally until considered safe**
- **18 – 30 years olds domestically and within Americas, internationally if can afford**
- **Travel advisors are playing an important role to cater the needs of high end FIT travellers**
- **Online booking platforms and OTA's for younger travellers (depends on cancellation policies)**
- **Smaller groups with lower guest-to-guide ratios**

" Both travellers and hosts must be responsible"

Visit Finland

Opportunities

High end travelers are the main target group until 2022

- FIT, small groups
- Affluent
- Couples, with friends & families
- Nordic tours for FIT's and small groups
- Mono-destination tours: Northern Lights experience
- Packaging summer in a new way
 - Helsinki + extension to Archipelago | Lapland | Lakeland
 - Nature experiences thru short excursions / activities
 - Combination of sightseeing, local culture and soft nature adventures – best of Finland in compact package
 - Self drive packages

Special interest?

Culture, sports, heritage

Visit Finland

- Which services are suitable for high end travelers?
- Trends -> new services
- Service design (small things matter)
- Sales channel strategy
- Understand the travelers mindset – end customer perspective. Empathy is as important as inspiration in message strategy.

Marketing

- Now is the time to make sure your website and social media channels are up-to-date
 - **Use native english language proof readers or translators**
 - **Health & safety protocols, information about healthcare facilities**
 - **Sustainable and responsible solutions must be well communicated**
 - Special groups, children
- Flexible cancellation policies are appreciated
- Big picture – short term, mid term, long term

5/19/2020



Visit Finland B2B activities in the US 2020



VISIT FINLAND ROADSHOW / VIRTUAL EVENTS/POSTPONING TO 2021?

2.10. Chicago

6.10. Los Angeles

8.10. New York

EUROPEAN CO-OPERATION

Informal forum of 21 countries

- Discussing joint marketing and promotional activities
- ETC

NORDIC CO-OPERATION

- Webinars (May, June)
- Tour operator survey with Visit Denmark, Norway, Sweden, Finland and Britain.
- USTOA market place event (December)
- Other possible marketing co-op

[Visit Finland](#)

VIRTUOSO

[Virtuoso](#) is an exclusive network of high-end travel companies who work together to create customized vacations for luxury travelers. 15 000 travel advisors.

- E-learning (June)
- B2B emailing (TBC)
- Webinar (September)
- Blog post (November)
- Advertorial in Virtuoso Traveler (December)

B2B2C JOINT PROMOTIONS WITH TO'S and OTA'sTBC

CROSS INDUSTRY PR PROJECT WITH CONSUMER BUSINESS BRANDS

RENT A FINN GOES VIRTUAL

Visit Finland B2B activities in the US 2021



WEBINARS & VIRTUAL MEETINGS

E-LEARNING

B2B SALES EVENTS

FAM TRIPS

B2B2C JOINT PROMOTIONS WITH TO'S and OTA'S

NORDIC LEVEL AND EUROPE LEVEL CO-OPERATION

CONSORTIA MEMBERSHIPS

CROSS INDUSTRY PROMOTION

Q&A



Lene H. Minyard



Rainer Jenss



Iris Serbanescu



Mervi Toivonen



Heli Mende



Katarina Wakonen



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Visit Finland



Visit Finland