

# Japan

Travel insights



Visit Finland

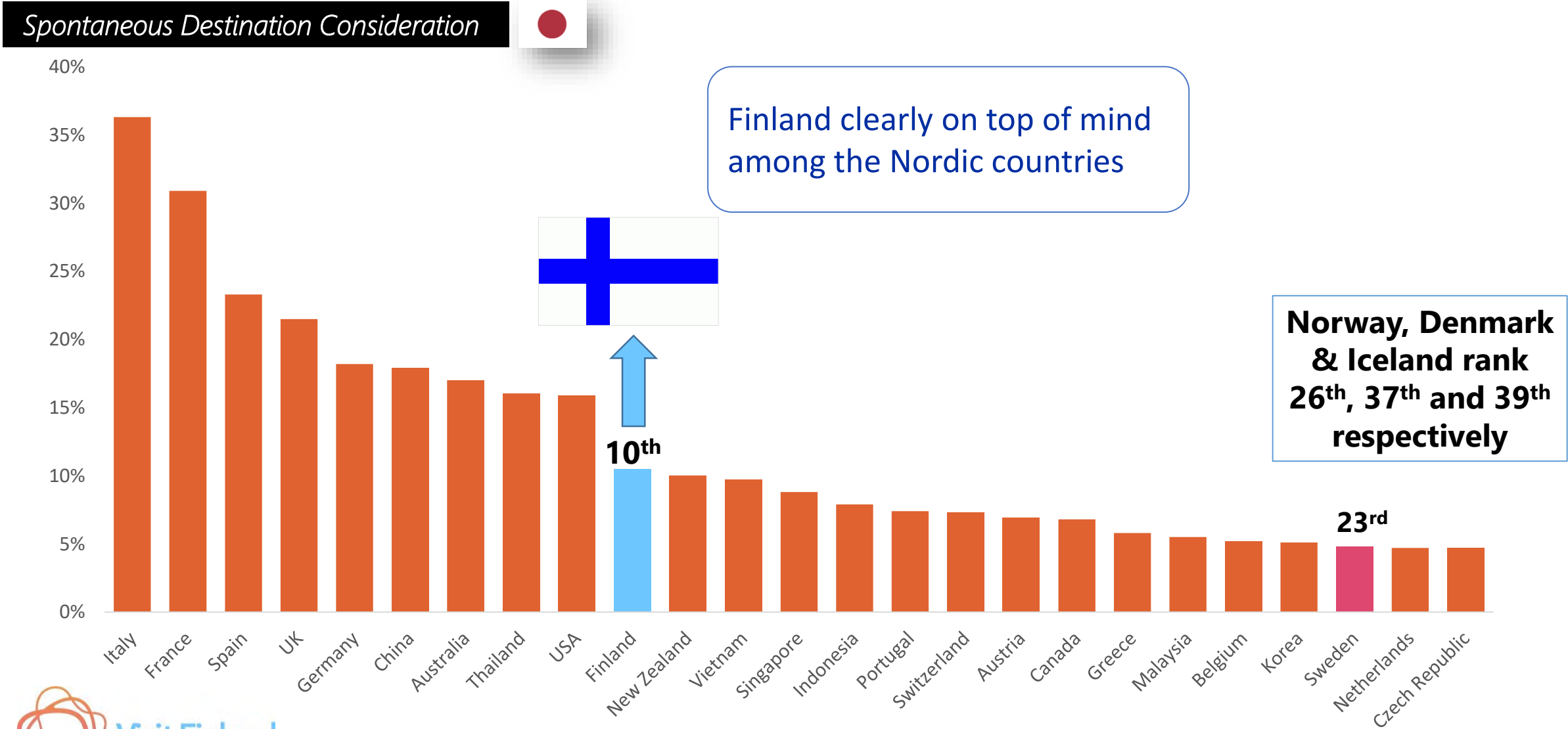




# Finland's image as a travel destination in Japan

Brand Tracking survey 2019

When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland stands out from its Nordic competitors and is ranked well ahead of the other Nordic markets



Visit Finland

**Q2. SPONTANEOUS CONSIDERATION DESTINATION**

Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,000)



## Spontaneous Impressions - Finland



Moomin village. The city  
of Santa.

*Aurora, beautiful cold  
forest, lake, Moomin,  
fairy, Santa Claus*

*Moomin, lakes, glacier  
midnight sun.*

*Metal music, Santa Claus, salty liquorice, sauna*

*Helsinki, Santa Claus,  
Marimekko, Iittala, Moomin*

*Snow, glacier, aurora, the  
midnight sun, Santa Claus,  
Marimekko, salmon,  
Helsinki, cold, history war  
with Russia.*

*Dog sled, reindeer, Aurora,  
sauna, salmon cuisine,  
miscellaneous goods (Arabic,  
Iittala, Marimekko), calm city,  
Baltic Sea*

*Snow, glacier, aurora, the midnight  
sun, Santa Claus, Marimekko,  
salmon, Helsinki, cold, a history of  
war with Russia*

*Country of nature  
are many lakes and  
forests.*

*Town of Santa Claus.  
Beautiful nature.*

*Aurora, Santa Claus, Moomin.*

*Beautiful nature*

Aurora, fjords, reindeer  
food, midnight sun,  
Moomin, Helsinki,  
Marimekko, Santa Claus,

*European country closest to Japan with Finnair. Marimekko. seafood. Rovaniemi. Santa Claus. Moomin. The snow queen. Connected to the Baltic States.*



**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 (298)



# Travel related searches

Digital Demand 2020





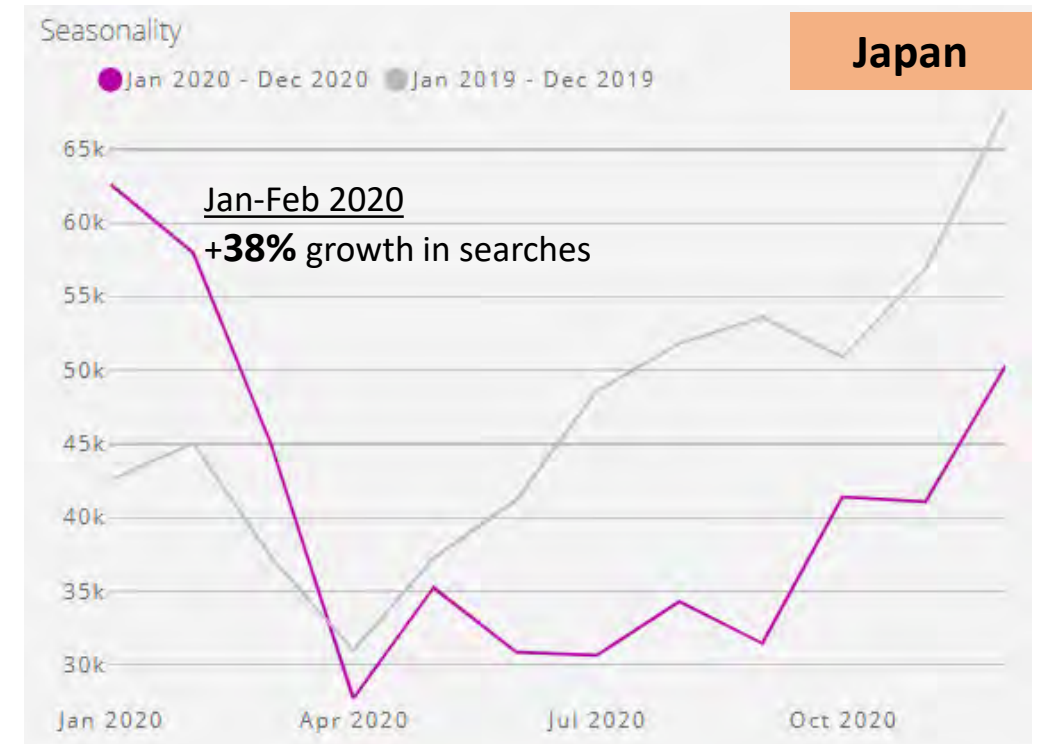
# Japan was #1 market by the number of internet searches also in 2020

**2019:**  
Japan #1  
556 800 searches  
+37% vs. 2018

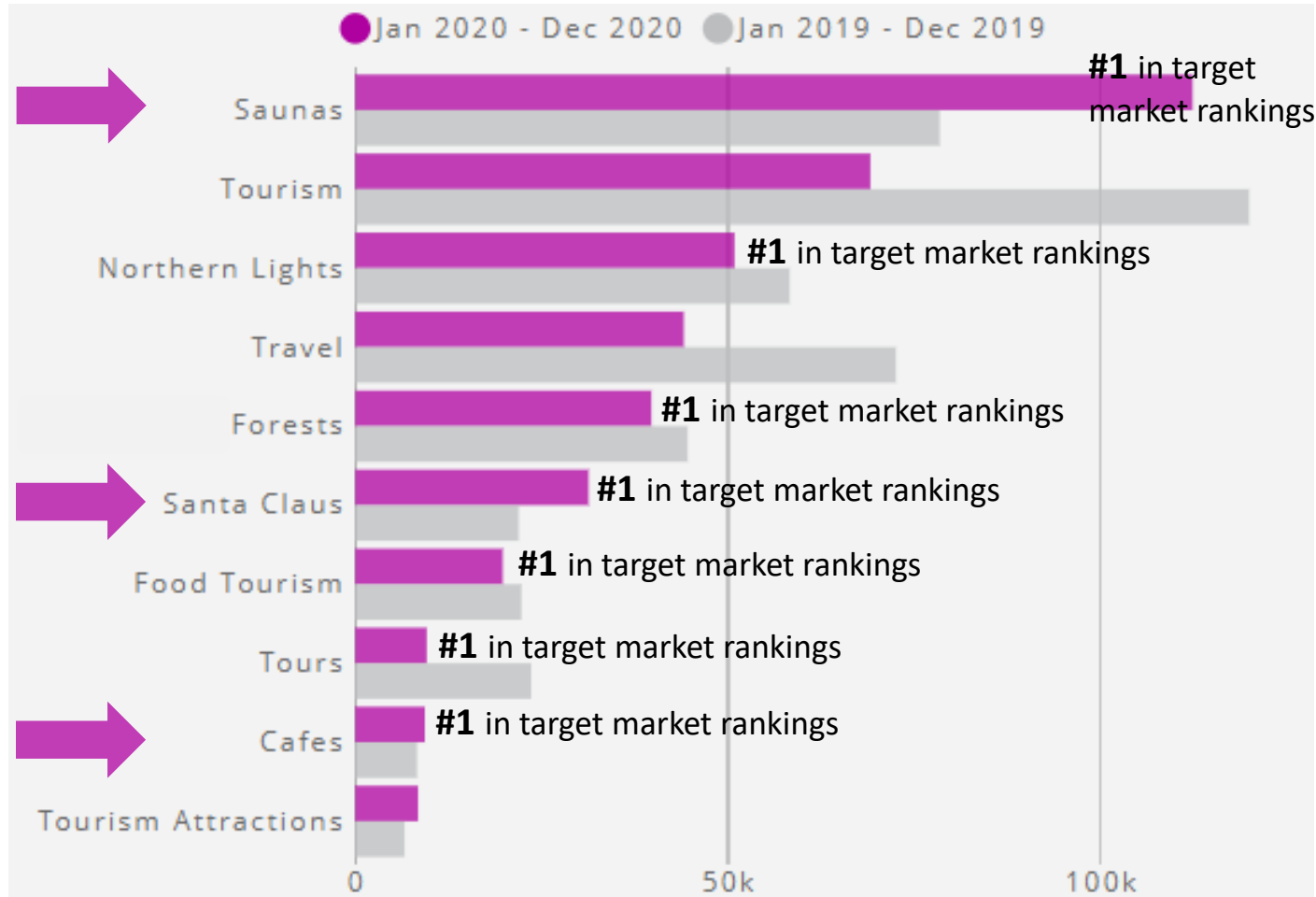
Rank	Country	Searches 2020	YtoY change
1	Japan	488 824	-13 %
2	Germany	480 439	-4 %
3	United States	457 516	5 %
4	Russia	347 434	-37 %
5	United Kingdom	333 867	-7 %
6	France	205 467	-18 %
7	China	201 482	-63 %
8	Spain	182 232	-11 %
9	Netherlands	180 535	25 %
10	India	171 296	6 %
11	Estonia	136 670	19 %
12	Sweden	128 918	-3 %
13	Switzerland	108 984	-10 %
14	Norway	74 032	15 %
15	Denmark	54 076	-1 %
16	South Korea	45 866	7 %
17	Latvia	36 844	6 %
18	Lithuania	23 539	1 %
19	Iceland	7 738	-37 %

All international searches in 2020:  
**4,8 million**, **-12%** compared to 2019

➤ **Japan: 488 800** searches in 2020,  
which was **10%** of all searches,  
**-13%** compared to 2019



# Japan: Most searched topics in 2020: Top 10 micro brandtags

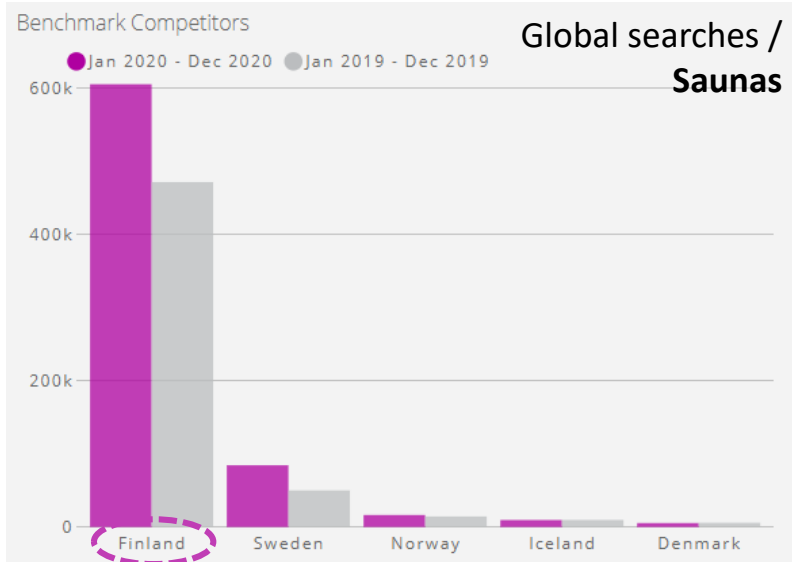


- Japanese are leading the searches for **Saunas, Northern lights, Forests, Santa Claus, Food tourism** and **Cafes** as well as for **Tours** in Finland.
- Searches also for **Saunas, Santa Claus, Cafes** and **Tourism attractions** increased during 2020 compared to 2019.

	Japan's ranking	YtoY change for Japan
<b>Saunas</b>	1.	+43%
<b>Northern lights</b>	1.	-13%
<b>Forests</b>	1.	-11%
<b>Santa Claus</b>	1.	+43%
<b>Food tourism</b>	1.	-11%
<b>Tours</b>	1.	-59%
<b>Cafes</b>	1.	+13%
<b>Tourism attractions</b>	2.	+27%

# Saunas:

Finland clearly the leader in global searches with good growth during the whole year 2020

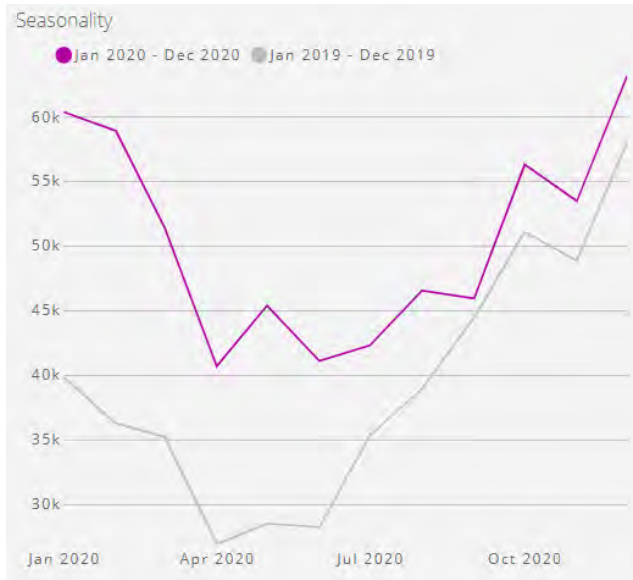


Travel-related searches on Saunas for Finland in 2020

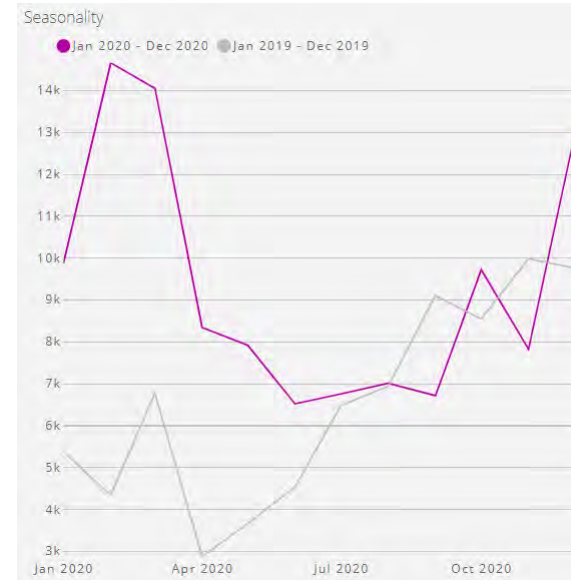
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	112,303	43.3%
2		United States	92,557	35.4%
3		Germany	56,300	17.5%
4		Netherlands	34,080	44.3%
5		France	19,801	-1.7%
6		United Kingdom	18,545	16.5%
7		Spain	18,160	5.6%
8		South Korea	13,980	114.7%
9		Switzerland	9,234	20.8%
10		Russia	8,938	12.8%

FINLAND: Global searches for Saunas growing



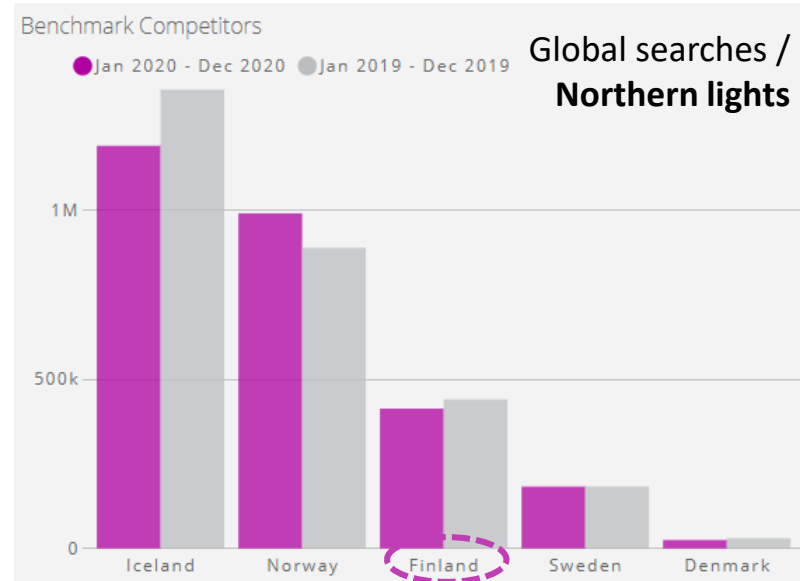
FINLAND: Japanese searches for Saunas





# Northern lights:

Finland clearly behind Iceland and Norway in global searches for the Northern lights

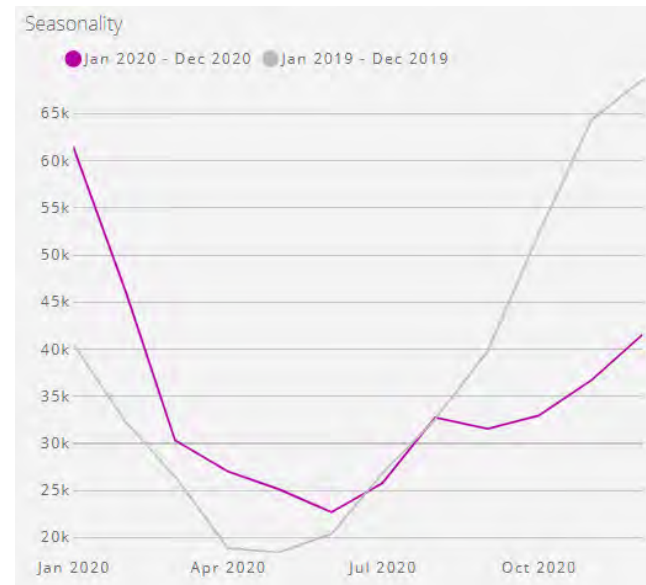


Travel-related searches on Northern lights for Finland in 2020

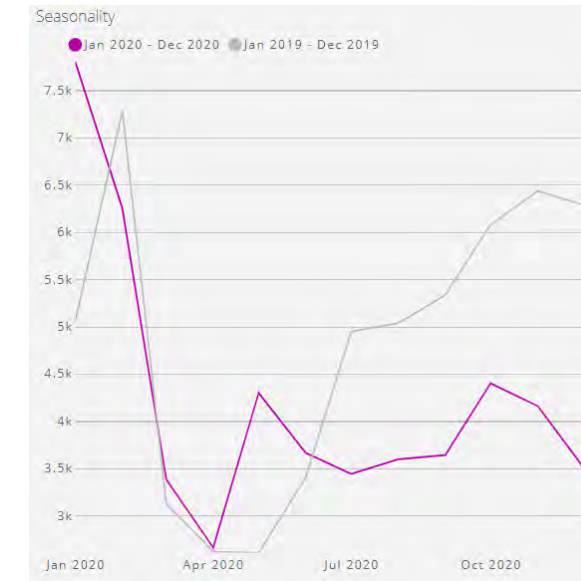
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	50,865	-12.7%
2		Germany	46,683	-10.7%
3		United States	37,865	-8.0%
4		United Kingdom	29,737	-22.8%
5		India	27,865	20.5%
6		Spain	22,144	-8.2%
7		France	18,696	-21.1%
8		Netherlands	9,124	-15.2%
9		Switzerland	8,967	-25.3%
10		Russia	8,900	-34.4%

FINLAND: Global searches for Northern lights

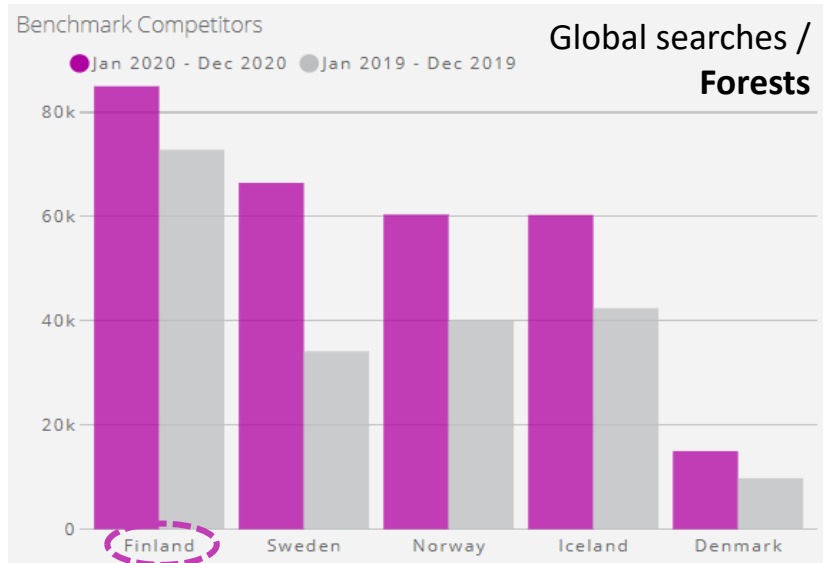


FINLAND: Japanese searches for Northern lights



# Forests:

Interest increasing in overall and Japan has been clearly #1 in Forest searches

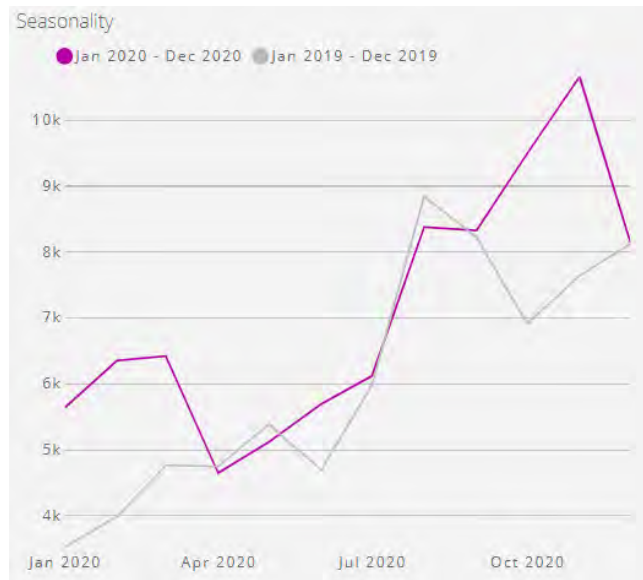


Travel-related searches on Forests for Finland in 2020

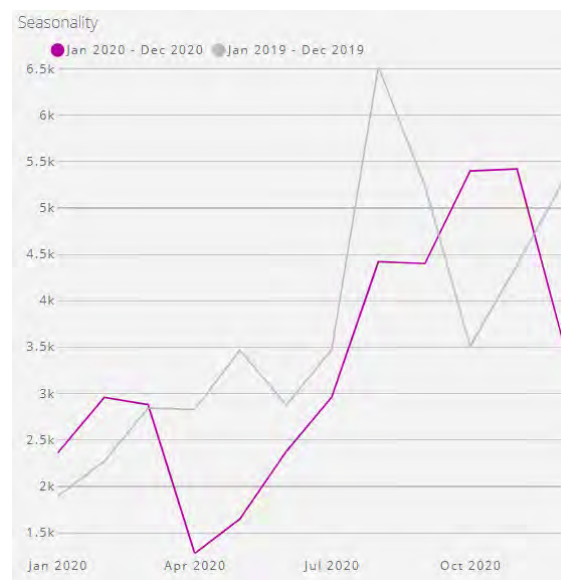
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	39,711	-10.9%
2		Spain	9,351	91.4%
3		United States	6,696	70.3%
4		Russia	3,720	39.7%
5		Germany	3,664	46.2%
6		United Kingdom	3,001	29.8%

FINLAND: Global searches for Forests



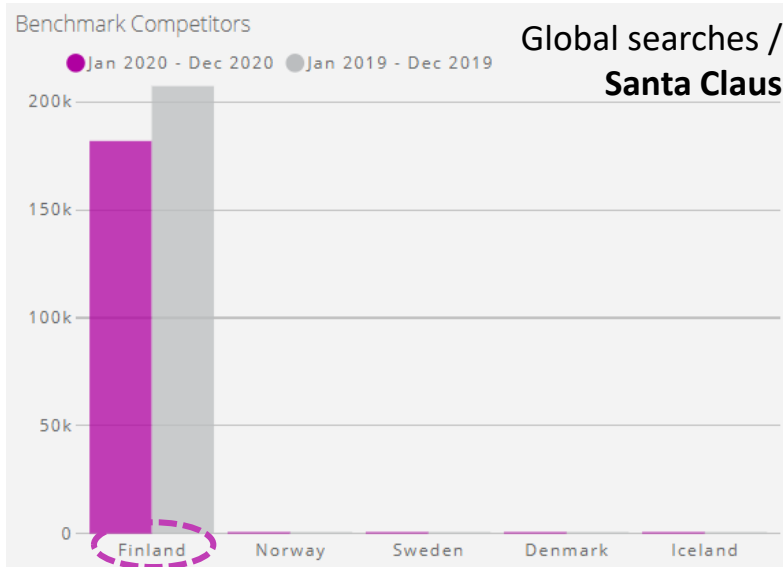
FINLAND: Japanese searches for Forests



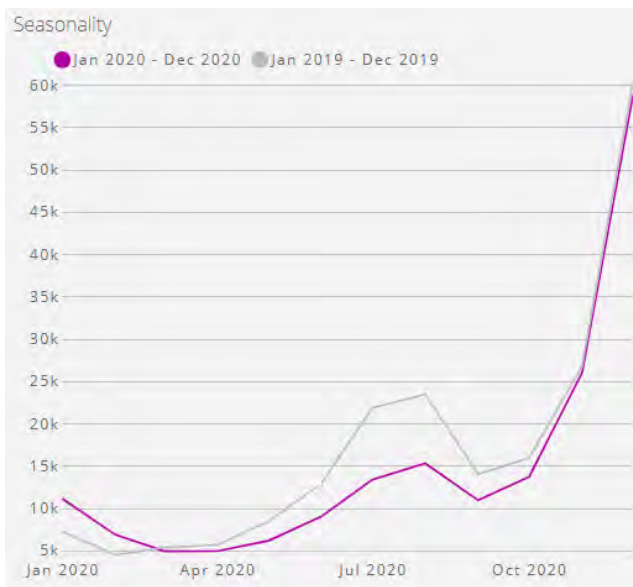


# Santa Claus:

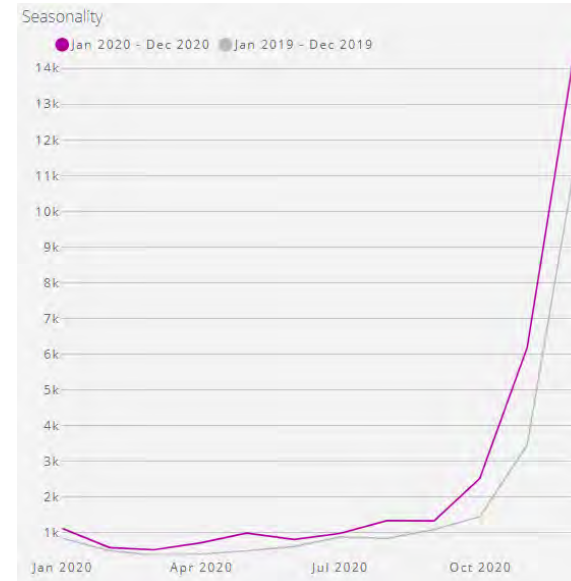
Finland clearly the leader in global searches and Japan #1 in Santa Claus searches



FINLAND: Global searches for Santa Claus



FINLAND: Japanese searches for Santa Claus



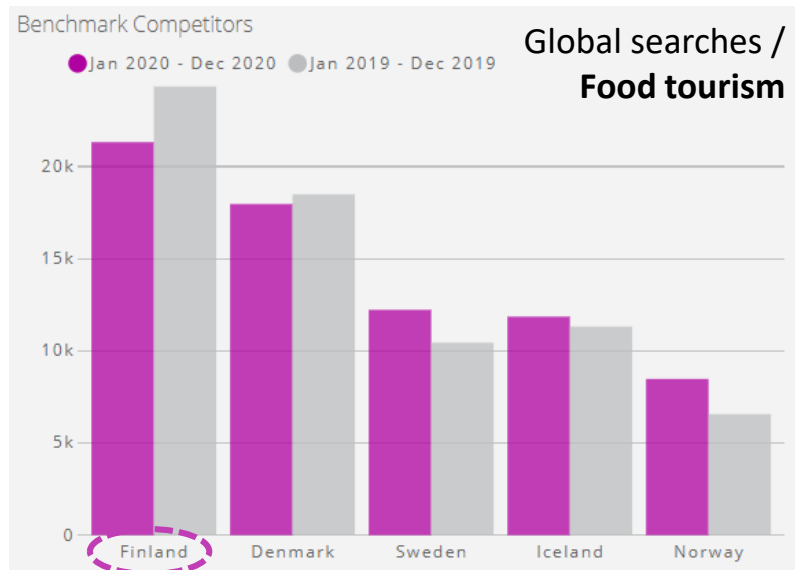
Travel-related searches on Santa Claus for Finland in 2020

Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	31,287	42.8%
2		United Kingdom	19,350	-23.6%
3		India	13,469	9.9%
4		United States	12,990	-2.0%
5		Germany	11,099	-10.4%
6		Spain	7,731	-16.7%
7		Netherlands	3,962	2.9%
8		South Korea	2,935	55.9%
9		Sweden	2,750	-14.4%
10		France	1,831	-6.1%

# Food tourism:

Finland leader among the Nordic countries in global searches for Food tourism thanks to the Japanese searches

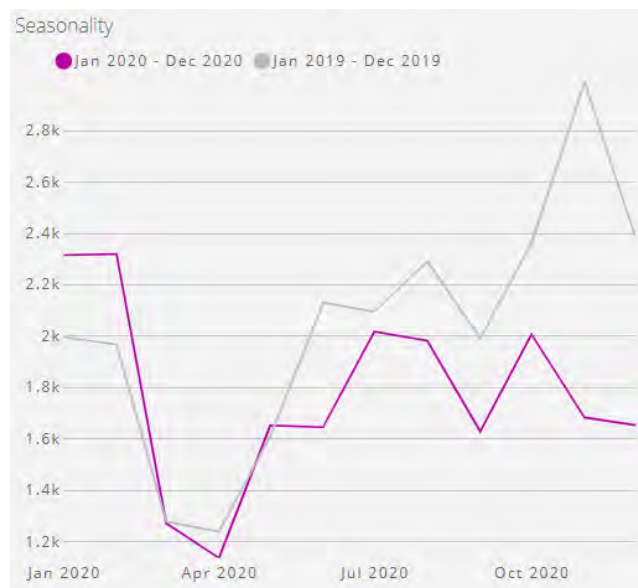


Travel-related searches on Food tourism for Finland in 2020

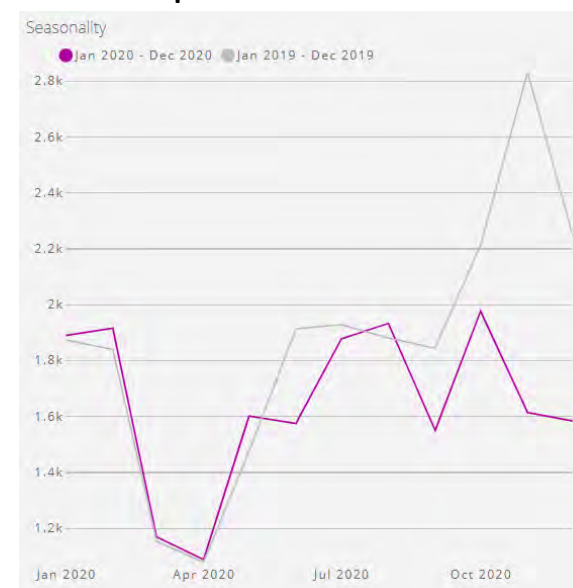
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	19,776	-11.2%
2		United States	235	-7.8%
3		United Kingdom	127	-50.4%
4		Russia	120	-45.2%
5		Germany	107	-20.1%

FINLAND: Global searches for Food tourism



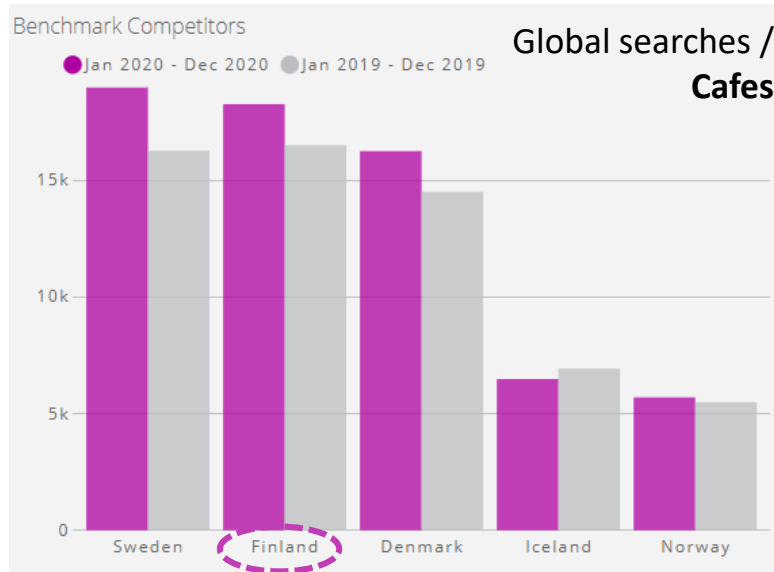
FINLAND: Japanese searches for Food tourism





# Cafes:

Finland close to Sweden in global searches for Cafes thanks especially to the Japanese searches

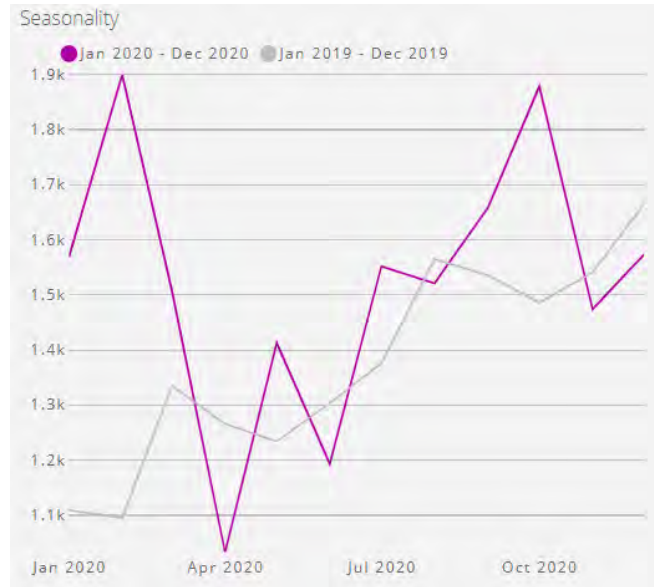


Travel-related searches on Cafes for Finland in 2020

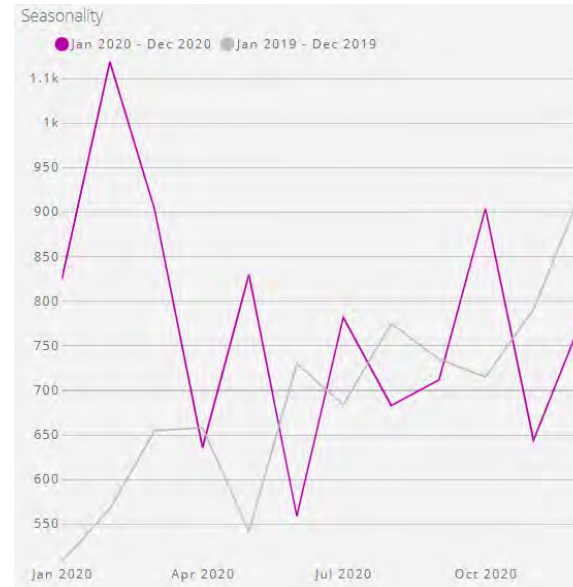
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	9,321	12,6%
2		United States	1,502	9,4%
3		Germany	1,429	84,9%
4		Russia	1,410	-11,7%
5		Spain	637	-0,6%
6		Sweden	532	-5,8%

FINLAND: Global searches for Cafes

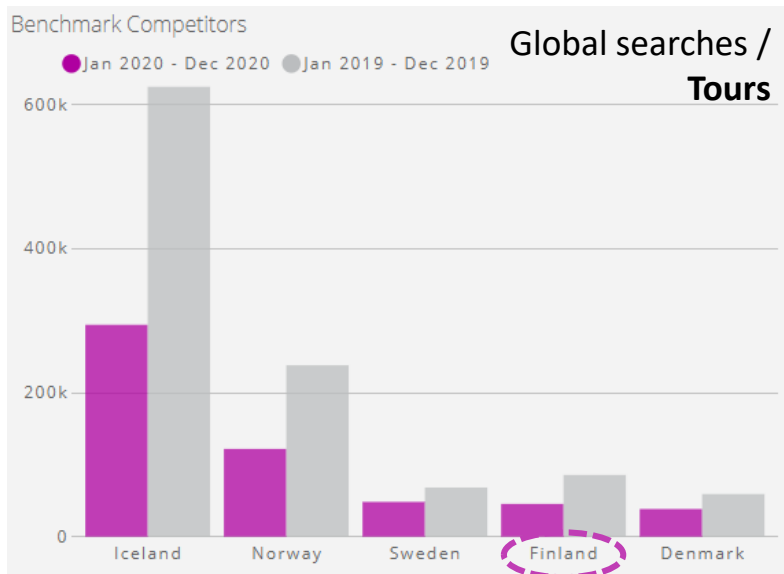


FINLAND: Japanese searches for Cafes



# Tours:

Searches for Tours clearly decreased due to the travel restrictions

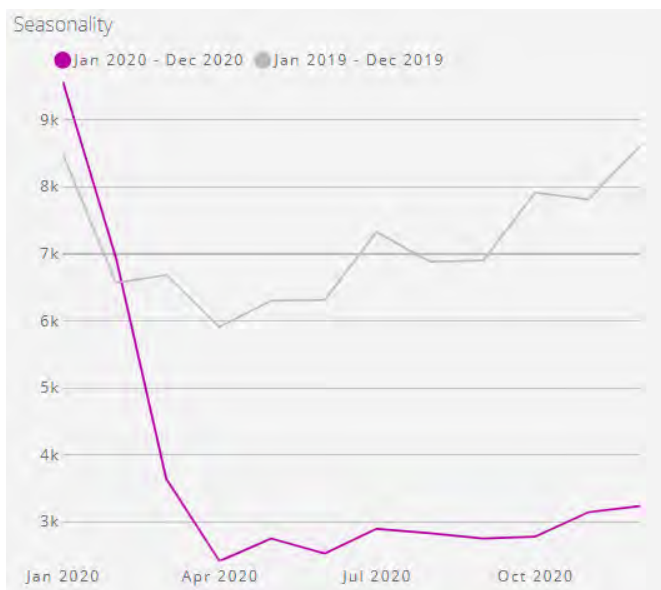


Travel-related searches on Tours for Finland in 2020

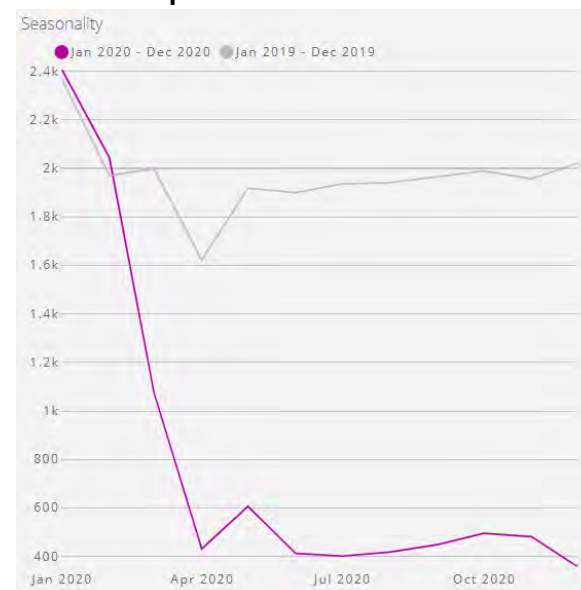
Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	9,584	-59,4%
2		Russia	8,390	-49,9%
3		United States	3,756	-29,9%
4		Netherlands	3,339	-18,6%
5		United Kingdom	2,396	-33,0%
6		India	2,157	-34,2%
7		Germany	1,281	-30,3%
8		Spain	1,010	-34,9%

FINLAND: Global searches for Tours



FINLAND: Japanese searches for Tours







# Japanese overnights in Finland and the Nordic countries

Statistics Service Rudolf, Statistics Finland

Statistics Sweden, Norway, Denmark and Iceland

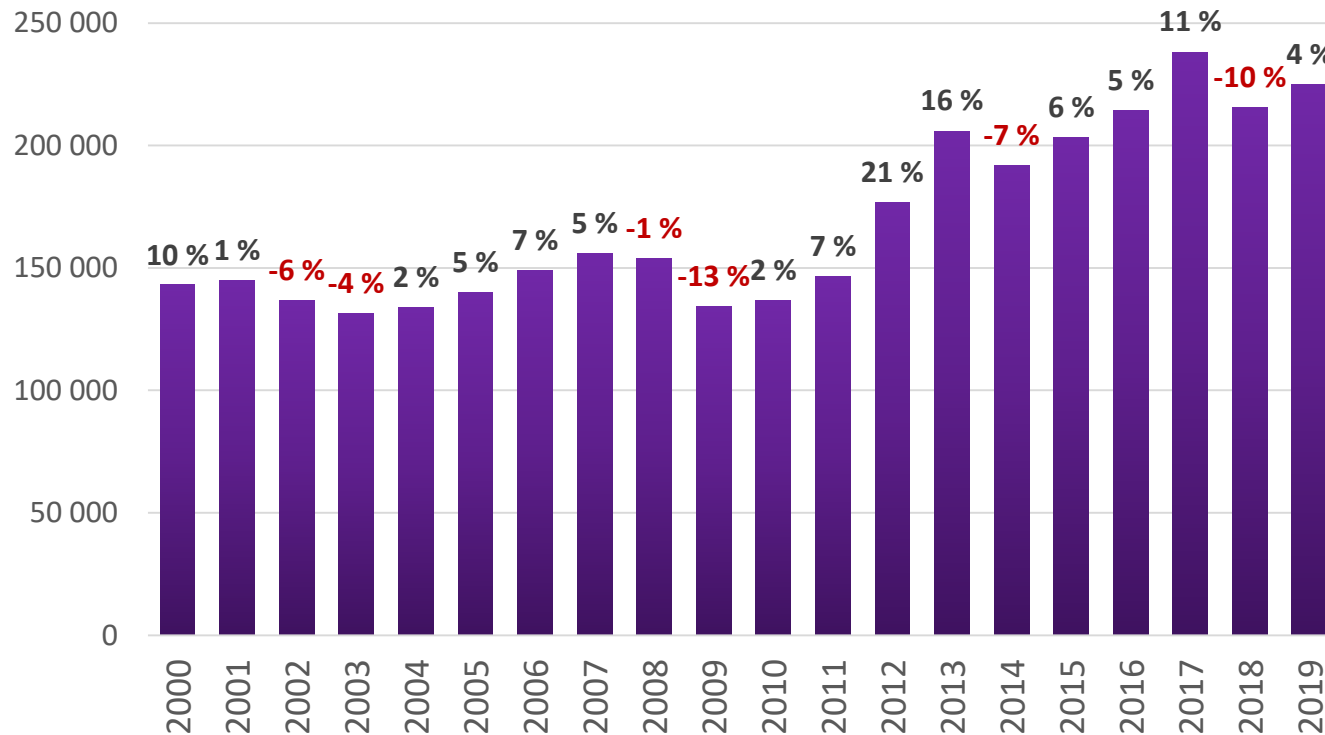


# Japanese overnights in Finland (pre-covid19)



## General information 2019: population and travel

- Population: **127 million**
- Outbound travel from Japan: **27 million arrivals to all destinations in 2019** (+6% from 2018)
- **Europe's** share of Japan's outbound travel: **20%**
- **Finland's** share of total Japanese outbound travel: **1%**
- **Travel Expenditure** (total outbound travel from Japan): **26 Billion EUR**



## Year 2019

**225 000** overnights in Finland

**10<sup>th</sup>** in country rankings  
with **3% share** of foreign overnights

Average change 2000-2019: **+3%**

Change 2019 compared to 2000: **+57%**

## Share of overnights by regions 2019



72%



5%



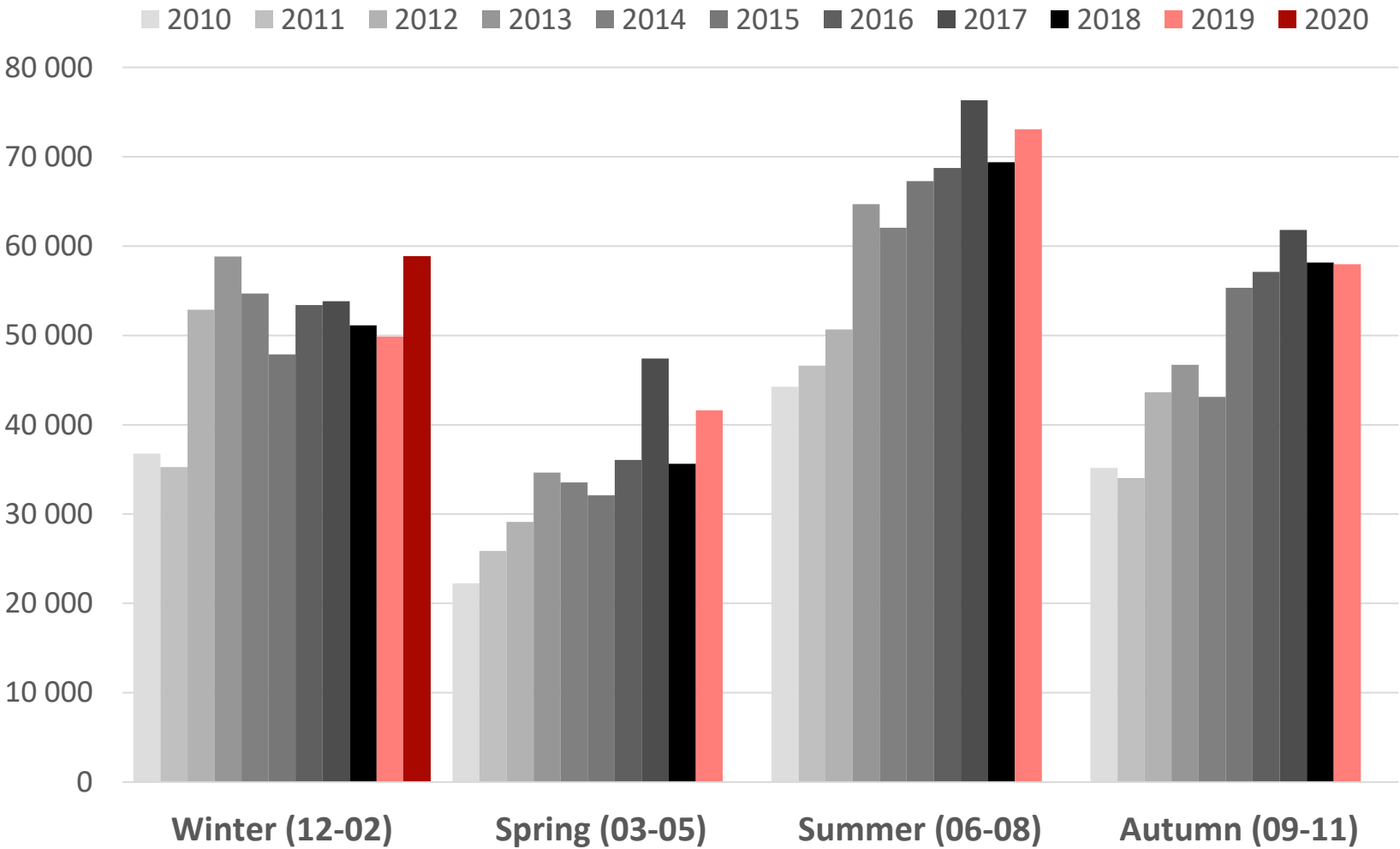
4%



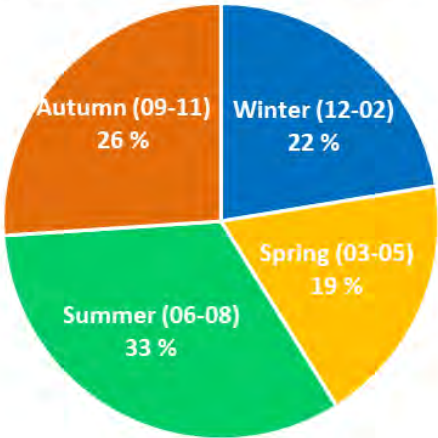
19%



# Seasonality of Japanese overnights in Finland (pre-covid19)



Japanese overnights in 2019



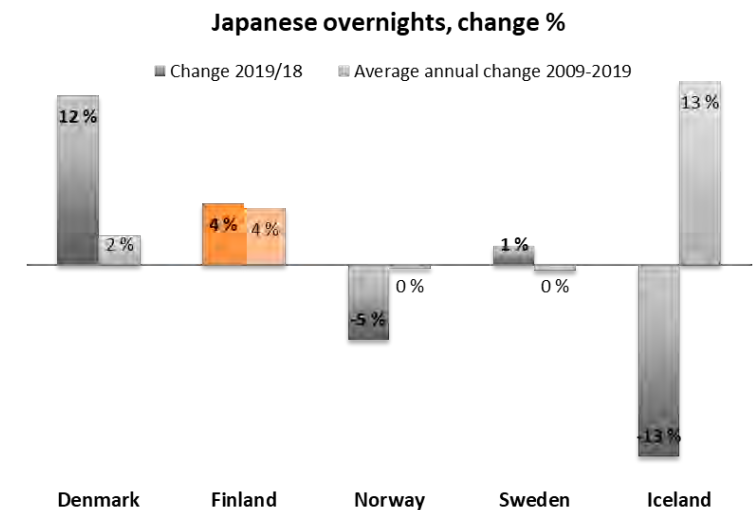
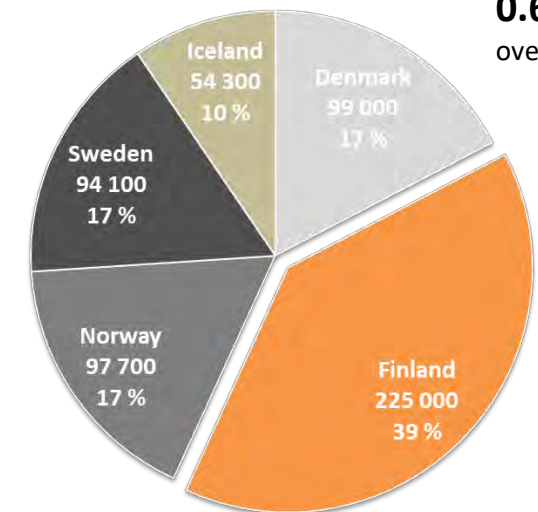
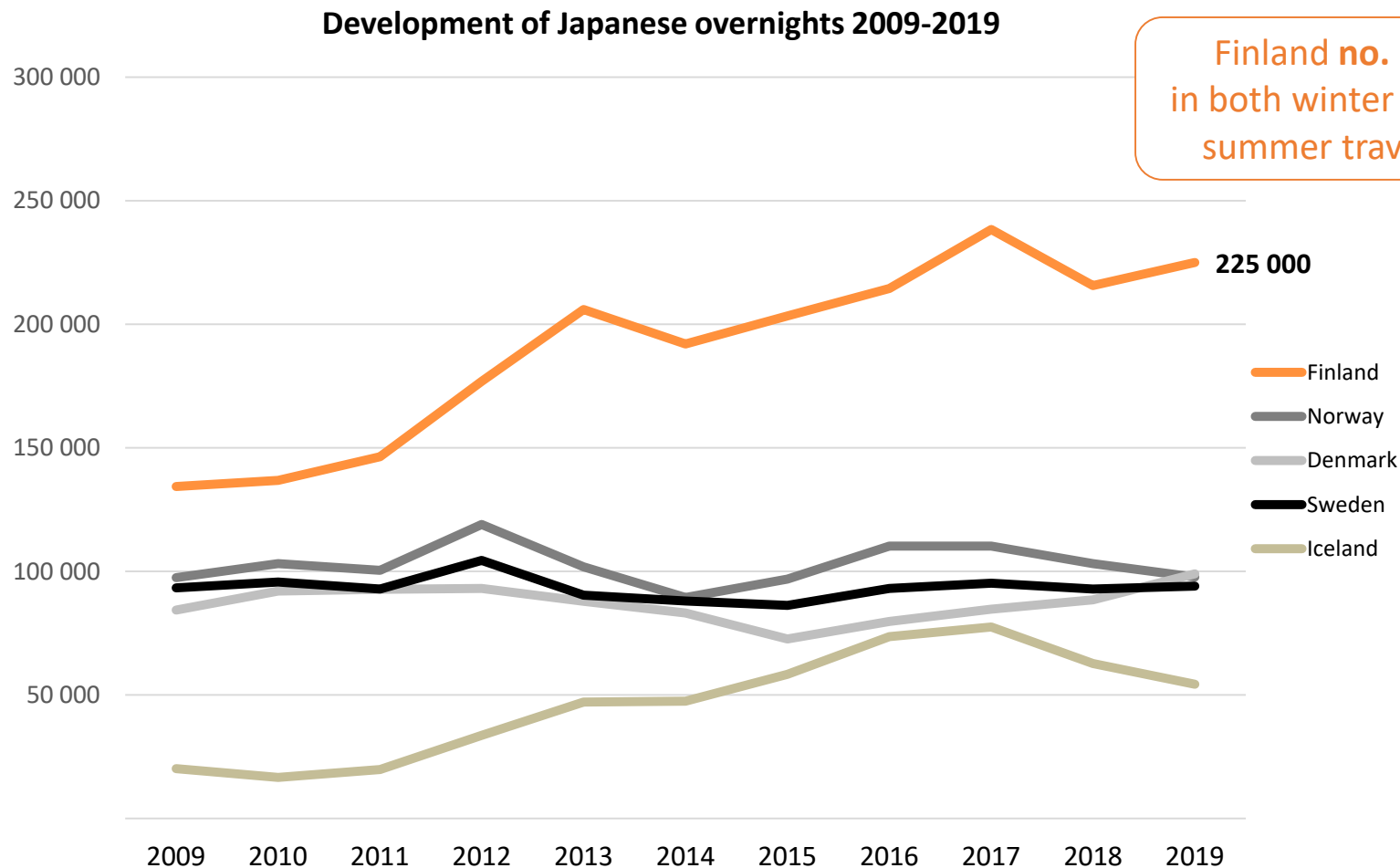
# Japan: Yearly overnights in the Nordic countries

(pre-covid19)



Nordic countries' share of Japanese overnights 2019

**0.6M**  
overnights in total



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



# Japanese overnights in the Nordics

## Monthly trend

- **Finland** has clearly been the most popular Nordic travel destination for the Japanese travellers.
- Japanese travellers like to travel in the Nordic countries during the summer as well as the early autumn months. **Finland** has also been a popular winter destination for the Japanese travellers.
- Travel from Japan to all Nordic countries has basically stopped since March 2020.
- **Finland's share of Japanese visitors** among the Nordic countries was **39% in 2019**, and the interest towards Finland was on the rise.

## 2. NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality

Japan

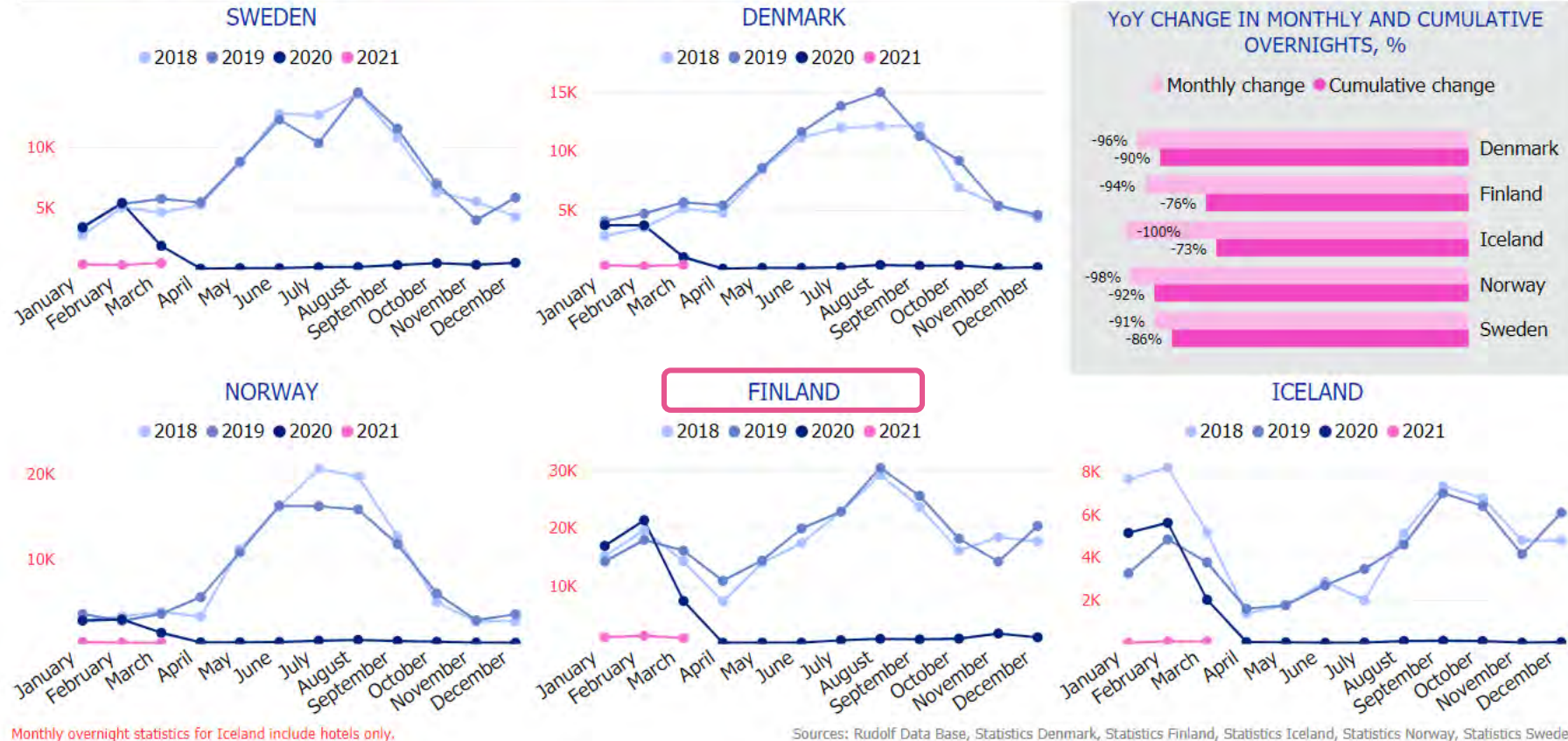
Year

2020

Month

December

VISIT  
FINLAND



# Japanese overnights in the Nordics

## Seasonal trend

- Nearly half of the Japanese visiting the Nordic countries during the winter choose **Finland** as their travel destination
- Also during the **summer season**, **Finland** has been the most popular destination among the Nordics for the Japanese travellers, and pre-covid Finland was even increasing its market share reaching already a 35% share of the Japanese overnights during the summer
- In the **summer**, **87%** of Japanese overnights is registered in **Helsinki region**. During the **winter season** around **half** of the overnights takes place in **Helsinki region** and around **40% in Lapland**.

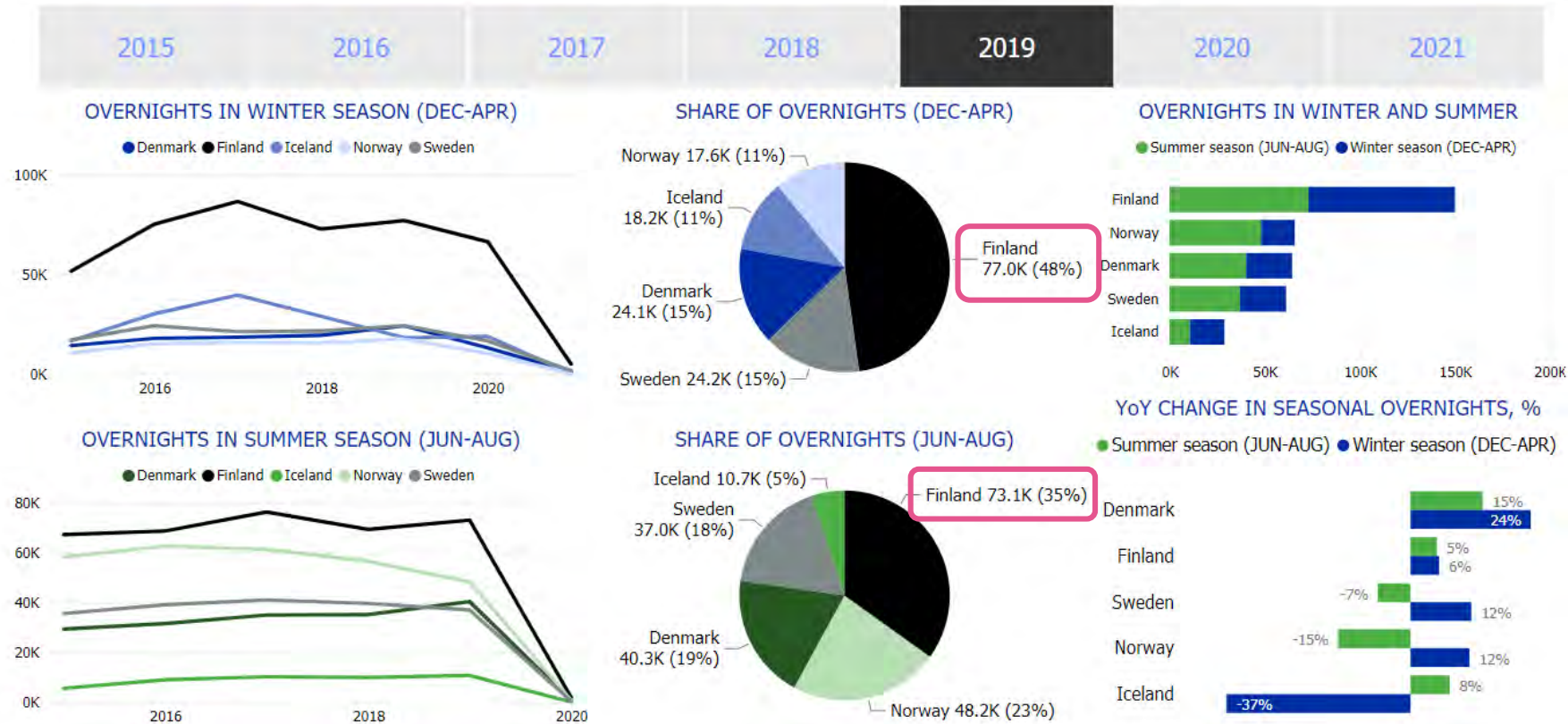


### 5. SEASONAL OVERNIGHTS BY A TARGET MARKET IN THE NORDIC COUNTRIES

Sources: Rudolf Data Base, Statistics Denmark, Statistics Finland, Statistics Iceland, Statistics Norway, Statistics Sweden

Nationality  
Japan

VISIT  
FINLAND



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



A scenic photograph of a couple standing on a gravel path, looking out over a calm lake. They are framed by the large, leafy branches of two trees. The scene is peaceful, with green foliage in the foreground and a distant shoreline visible across the water.

Outlook on trends



# WHAT HAS CHANGED?

## CHANGES IN TRAVELLER BEHAVIOUR IN TIMES OF COVID-19

-short-lived trends or here to stay?-

### Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for '*staycations*' or vacations close to home.

### Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.

### Younger travellers most resilient

#### Change in demographics:

travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.

### New concerns

Health & Safety measures and cancellation policies are consumers' main concerns.

### Last minute

Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.

### More responsible

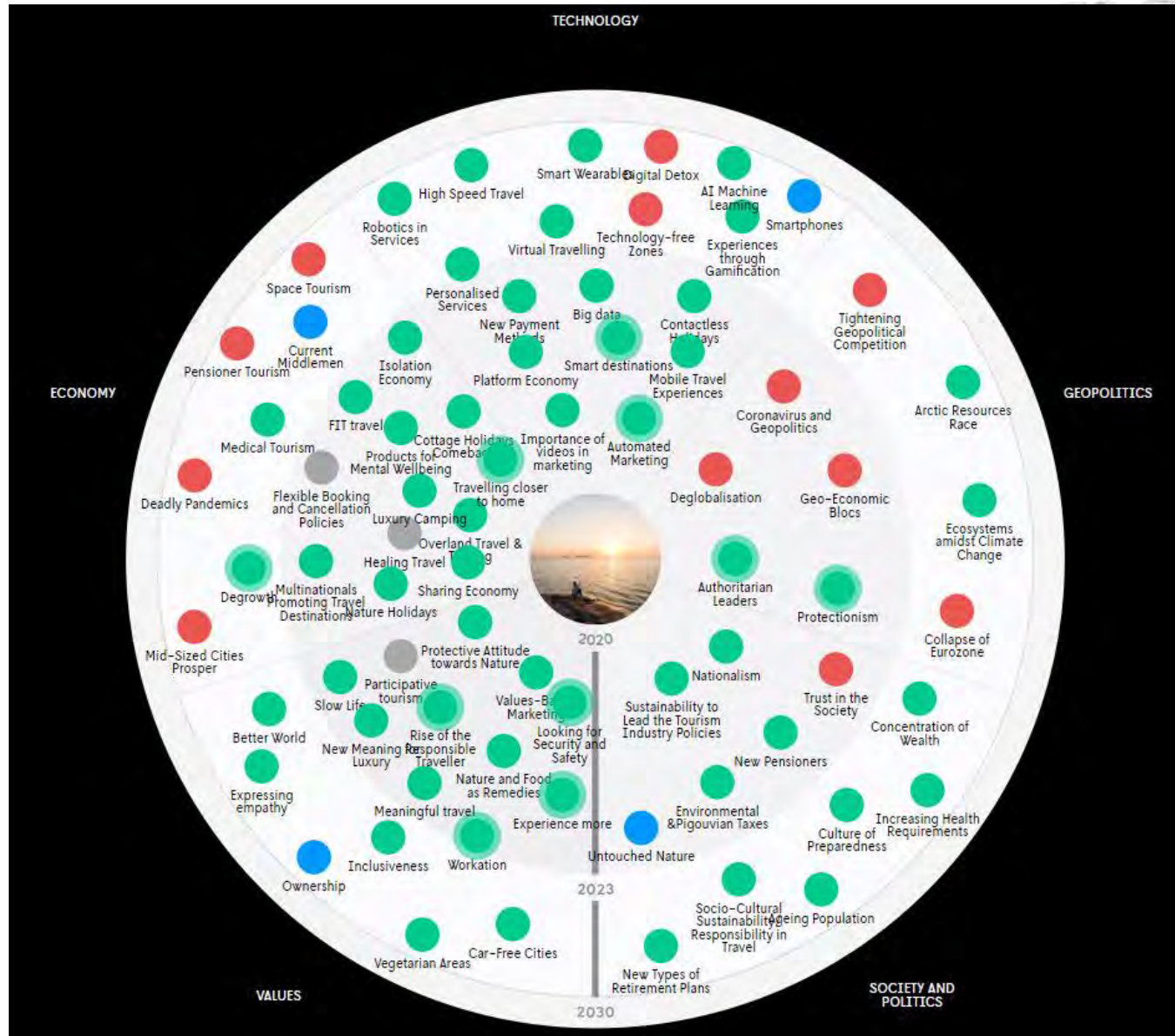
#### Sustainability, authenticity and localhood:

travellers have been giving more importance to creating a positive impact on local communities, increasing looking for authenticity



# GLOBAL FUTURE TRENDS & CHANGE SIGNALS

impacting Finnish Travel Industry, Asia will be updated in the autumn 2021



# GLOBAL FUTURE TRENDS & CHANGE SIGNALS

impacting Finnish Travel Industry, Asia will be updated in the autumn 2021

## Healing Travel VF

● Weak signal | Crowdsourced: 2021.52



Healing travel / a wellbeing holiday is more than a bit of relaxation but one that addresses how to maximise your state of health and happiness. Whether you have undergone different types of emotional or physical trauma, or simply need a break from a stressful busy life, 'healing holidays' – also referred to as wellbeing holidays or wellness retreats – can be hugely beneficial.

In the U.S., many people have lost loved ones to the pandemic or they have as essential workers worked themselves close to burn out. Mental health issues are increasing. Travel for the purpose of healing and renewing yourself is rising in the U.S. Travel style can be solo, as a couple, family or with a small group of friends depending on the reasons to heal.



Forest Bathing | Shinrin-Yoku | Healing in Nature | Short Documentary

## Contactless Holidays VF

● Strengthening | 2021–2024  
Crowdsourced: 2022.59



Zero-contact services are rapidly becoming more common as a result of the COVID-19 pandemic. Companies are feverishly looking for ways to provide service without customers having to come in contact with employees or equipment. Restaurants, transport services, shops and numerous other actors have had to think of new ways to avoid the risk of infection during a pandemic. It is likely that many of the new practices will persist even after the pandemic has subsided, as contact involves the potential for a wide range of other microbes to spread. This has many implications on the tourism industry services, from taking care of the overall health and safety measures to developing self-service protocols and use of technology.



Coca-Cola and AWS Reimagine the Future of Contactless Experiences, Amazon Web Services

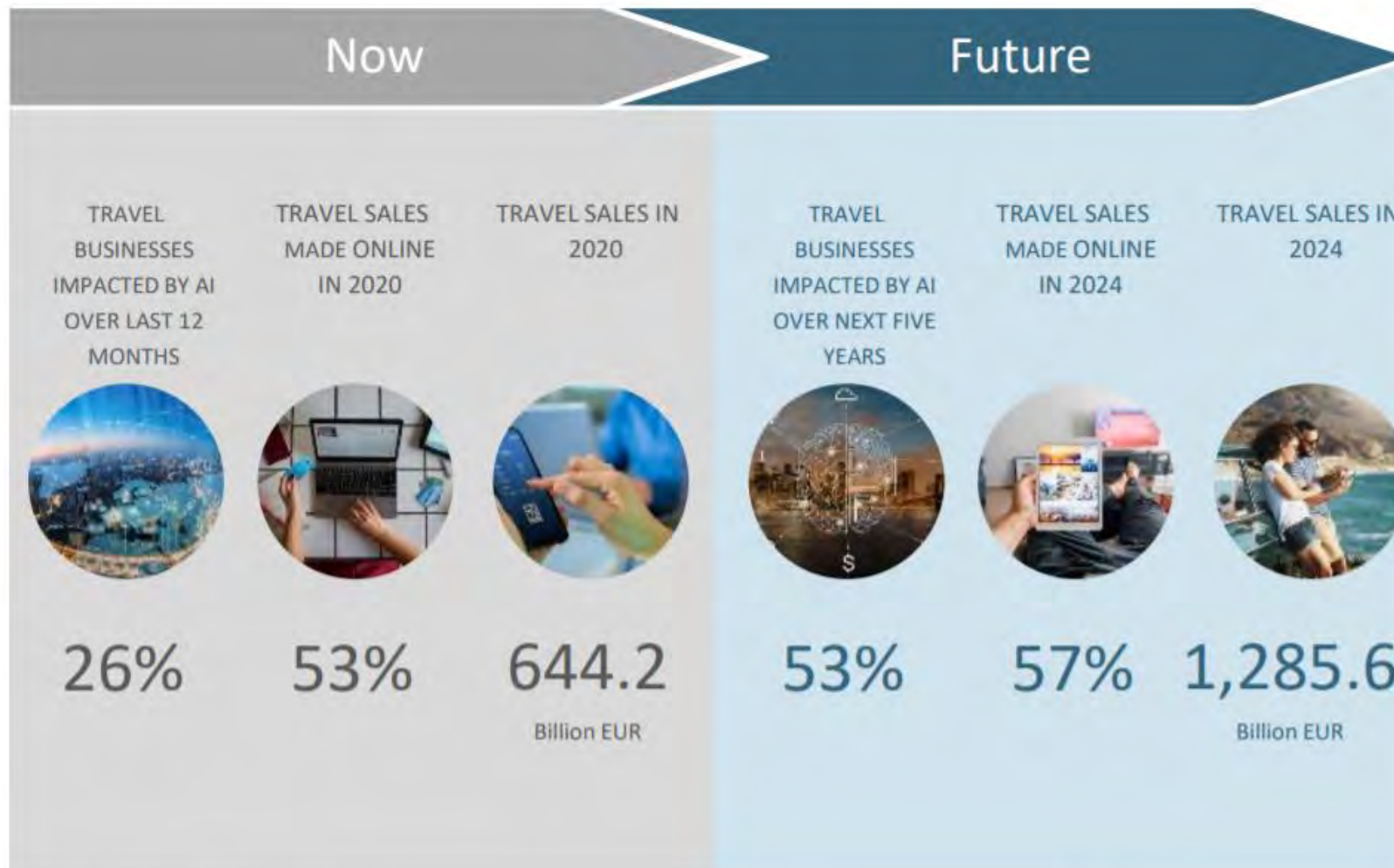
Read more: [businessfinland.fi](https://businessfinland.fi) > [matkailun ennakointi](#)



## Digital transformation to accelerate



COVID-19 IMPACT ON INDUSTRY



Source: Euromonitor International

Note: The data refers to cumulative values for Western Europe and North America.

© Euromonitor International

FUTURE WATCH REPORT





## TRAVEL

## Big data and artificial intelligence will be key investment areas

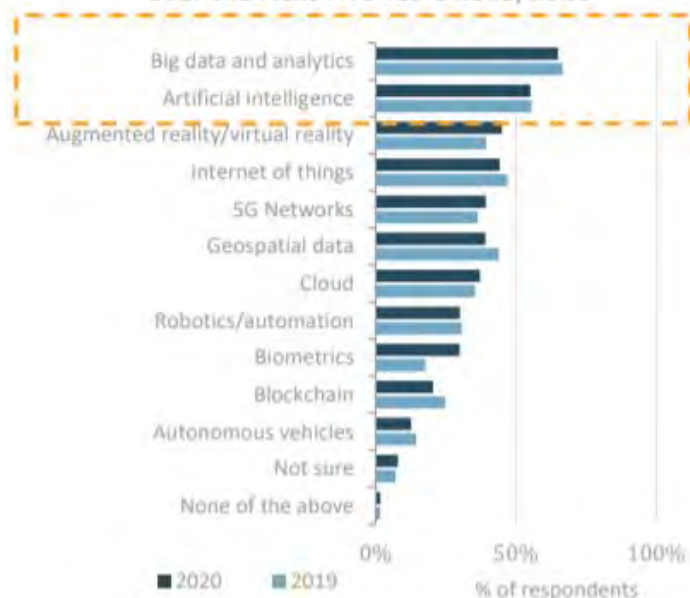


In the light of COVID-19, ensuring safe travel experiences, providing information about COVID-19, shifting from physical to online platforms and building a mobile presence are expected to become the key priorities for companies engaged in consumer travel. As result, big data and analytics, along with artificial intelligence, will be key investment areas for the travel industry's digital transformation, with 65% and 55%, respectively, of respondents in 2020 expecting these technologies to have an impact over the next five years.

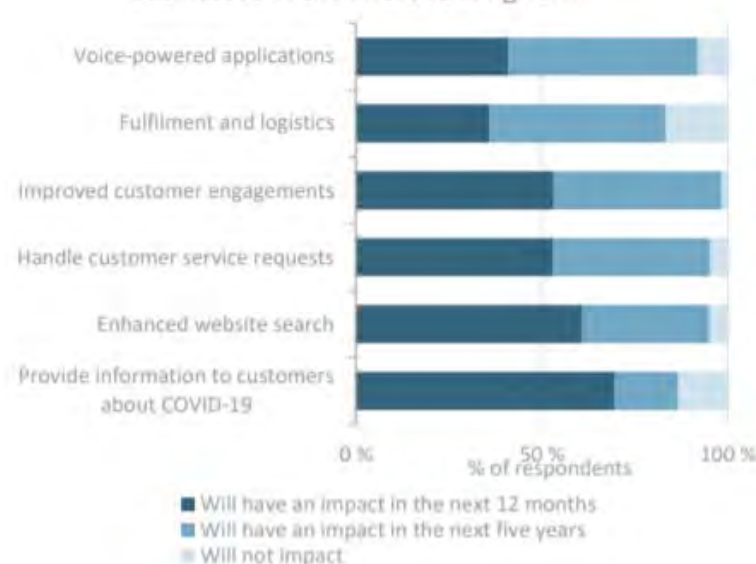
Big data and analytics remain key investment priorities

Provide key COVID-19 information – an important short-term goal

Comparison of Technologies to Impact Travel over the Next Five Years 2019/2020



Impact of Artificial Intelligence on Travel Businesses in the Short vs Long Term



Source: Euromonitor International Voice of the Industry – Travel and Tourism, April 2020

© Euromonitor International

FUTURE WATCH REPORT



## TRAVEL

## Technology to be used in pushing a value-driven industry model



IMPACT ON DIGITAL LANDSCAPE



## Short-term

- Amid global travel restrictions, demand for travel services declined significantly.
- Financial support is vital for the travel sector to stay afloat.
- The travel industry has witnessed a temporary shift towards domestic travel.



## Medium-term

- Last-minute reservations and mobile bookings are increasingly favoured by consumers.
- Companies will continue with digital developments so that they can deliver real time information and customer service in destination via mobile.



## Long-term

- Recovery is likely to involve a shift from commoditisation to a value-driven industry model in order to drive recovery.
- Technological transformation is expected to accelerate.



# Strengthening travel motivations for nature-oriented travellers



**Q13:** What is your organization's perception of the following consumer motivations, based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I

# Trending trip types for nature-oriented travellers

## “Hot” Trending High-Demand Trips



1. Custom Itineraries
2. Greener/Sustainable/Low Impact Itineraries
3. Electric Bike Itineraries
4. Expert or Specialist-Guided Trips
5. Remote Destinations/Trails
6. Wellness and Mindfulness Itineraries
7. Self-Guides

**Q12:** What is your organization's perception of the following itinerary trends based on consumer demand and bookings over the last year?

**Base:** All respondents (n=129), excluding those that selected "Not Applicable" for each item

**Source:** 2020 Adventure Tour Operator Snapshot Survey Part I





Visit Finland