France Market Report
May 2019

Visit Finland Country Representative

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Semiannual Report – FRANCE

Winter season 2018-19 and outlook for summer 2019

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Factors affecting the results of the winter season 2018-19

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

Overall outbound travelling **from France increased** a little bit during the winter season 2018-2019. Even if the **political situation** in France ("gilets jaunes") is not very stable at the moment, French continue to plan, book and travel as before and even a little bit more. Only Paris has suffered from these events and drop of visitor figures (both French and foreign visitors).

Most popular destinations are still **closed markets** (Spain, Italy and also Greece) but Tunisia, Morocco and Egypt grew also during this winter season. **Security situation is now better** in these countries and confidence of French visitors is becoming back.

Holiday seasons and duration remained same than previous years. **Main holiday season is Christmas and New year's holidays** and 2 weeks **winter holidays** (school holidays) in February.

Big segment for winter season are **meeting industry clients (incentive groups).** This target group has grown during last years remarkably, and is very potential to grow even more. This target group is interesting also because travelling out of the high holiday seasons.

Factors affecting the results of the winter season 2018-19

Reasons for the increase/decrease in travelling to Finland?

French overnights **grew during the winter season** 2018-2019. Winter **image is strong** and demand for the winter products and packages is growing every year. **Tour operators continue to sell well** winter products and are adding new products to their catalogues.

Finland's image as a travel destination in France is becoming stronger, especially concerning the winter season. Lapland is the most known region and attracting most of the winter season tourists. Visit Finland is now putting efforts to reinforce also summer image and communicate actively about all the possible activities and experiences in summer time.

Distribution stayed quite same than the previous winter season. Biggest tour operators **grew their capacity** and some smaller ones added also new products to their catalogues.

Accessibility is quite good from Paris to Helsinki and also once a week from Paris to Kittilä. **New flights from Lyon** to Helsinki (during winter season) helped to improve the accessibility outside of Paris. **Lyon region has a big potential** concerning leisure travelers but also business and incentive travelers.

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Factors affecting the results of the winter season 2018-19

Reasons for the increase/decrease in travelling to Finland?

Multi-activity packages are still the most popular products and French travelers want to have **different experiences** (husky safaris, aurora safaris, snowshoeing etc.) in Finnish nature. **Green values** are becoming important and therefor “softer” activities as snowshoeing and skiing are becoming popular. Some tour operators don’t want anymore to program snowmobile safaris for ecological reasons.

Lapland is the most known region in Finland for the winter holidays. Other regions (as Hossa) are also getting more known (also as an alternative for Lapland during high seasons). **Rovaniemi and Kittilä regions** (with Ylläs, Levi and Muonio) are the main destinations in Lapland for the French travelers. Also **Kuusamo** has grown since few years.

There were some winter **joint promotion operations together with tour operators** and some of them had also their own winter campaign in OTA channels (voyage Privé and Ventes privees).

PR work was active and there was a big demand for press trips and tv groups (especially around Christmas time).

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Outlook for the summer season 2019

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

Summer **looks stable** and there might be a little bit growth. **B2B communication and training** have been actively done to convince French operators of Finland's summer offering. There were few **joint promotions** with selected tour operators in April. Also **active PR work** is done to reinforce summer image and grow the demand. An **OTA campaign** is going on and promoting summer products in Finland. The **demand is still quite small** and Finland not so well known for its summer season. Therefor also tour operators don't have big marketing budgets for summer promotion.

Some **new summer products** were launched for this season in Lake region and in Lapland. There is also a growing interest in cultural holiday tours and new products are being developed.

Concerning summer products, **visibility in online channels** is important. In winter season French travelers use still quite much tour operators' and agencies' services (for packaged products), but **concerning summer, online sales channels are essential to attract also FIT tourists.**

Outlook for the summer season 2019

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

What are the trends for the summer 2019?

Outbound tourism from France is estimated to grow during summer 2019. **North African countries** (Morocco, Tunisia, Egypt) are attracting tourists again and growth can be seen both in summer and also in winter. Also **Greece and Turkey** are growing. Nevertheless, French are also looking for **“new destinations”** and as North Europe is ”trendy”, growth of French visitors to Nordic countries can be expected.

Concerning summer season the target groups in France are travelers looking for **nature destinations and outdoor activities.** They also want to **discover local culture and have live like a local experiences**. Travelers living in big cities want to be in the nature and **enjoy clean air and calm environment**. Finland has the appropriate offering for this type of target group, but it is not enough well known yet.

Outlook for the winter season 2019-20

Ad hoc marketing opportunities

Concerning the winter season, **cooperation with the tour operators is important**. Most of the French travellers during winter are still coming through tour operators and agencies, and therefor French players are looking also for new winter products. Visit Finland will participate at **professional Fair *IFTM Top Resa* in Paris** in the beginning of October. It is a good event for Finnish suppliers and regions to update their French B2B contacts and get new ones.

Joint promotions are a good way of promoting new products and support tour operators in their product launching phase. Concerning winter, many of the tour operators have also their own campaigns and promotional activities, and are looking for cooperation for their planned promotion activities.

PR work is essential to **maintain our good image and position as a leading winter destination in the Nordics**. Even if more efforts are put in summer image reinforcement, winter should not be forgotten. Our competitors are doing big efforts in trying to attract winter travellers and to be able to keep our position, we need to continue our communication efforts.

Crossover collaboration and campaigns are good and efficient ways of getting visibility for Finland. Especially consumer goods producers are good partners for B2C visibility. In France, crossover cooperation has been already used in different events, and some campaigns are also planned for this year (especially in the Food and design sectors).

Prospects for the autumn/winter season 2019-20

The overall outlook of travelling to Finland?

What trends should be considered in product development to increase the demand in the autumn/winter time?

Demand for Finland in winter is good and the image is strong. There is a **difficulty with the availability in some parts of Lapland**. In product development it is good to look for regions in Lapland (or elsewhere) where there is still capacity for growth in winter and also the right offering available (multi activity winter holidays).

Concerning the **autumn season**, there is **potential for increasing the demand** from France. Some special target groups as **active senior travellers or outdoors travellers** are travelling out of the holiday seasons and are looking for new nature destinations. *Ruska*-theme products and northern light products are interesting and could be developed in different regions.

Which present target groups should be considered to increase the demand?
Families and incentives groups are still potential target groups for increasing the demand for winter. They are looking for secure, but ”exotic” destinations. Concerning autumn season, **active nature travellers are potential** and also an increasing target group for Finland. They’ve often visited Norway or Iceland already and are willing to see other destinations in Nordics.

Which new target groups should be considered to increase the demand?
Potential and new target group for Finland are **active senior travellers.** They are looking for nature and outdoor activity holidays combined with a cultural touch (visits and events). They are also looking for another type of products than multi-activity packages in Lapland.

Theme check: Sustainability, digitalization and year-round tourism

Visit Finland strategic cross-cutting themes are sustainability, digitalization and year-round tourism.

What kind of demand or potential of these themes you find in the market you represent ? (Products, target groups)

Sustainability is becoming an important value and part of the daily life but also **part of the holiday**. French were little bit late with the sustainable development, but are catching the rhythm. Finland is seen as a sustainable destination already, but we might need still to communicate more about our **sustainability in practise and sustainable travel possibilities**.
Concerning sustainable travel, more and more **"soft-travel" products** have popped up in the offering in France; Social, **participatory holidays**, **nature preserving actions** during your holidays, **green activities** (not polluting nature) during your stay etc.

Digitalization is now an evident part of the French' travelling; in planning phase, booking phase and during travelling. Especially younger travellers are **looking for ideas in social media** and want also to communicate about their **experiences during their holidays**.
Booking are done also more and more through online channels. **New platforms /actors** have born in online tourism sector and are creating new type of offering; putting end clients in direct relationship with a local travel agency or DMC (Bynative.com, Booktrip.fr, Evaneos.fr etc.). We should **secure that Finland is present** in these channels and help them to further develop the offering.

Most of the French are coming to Finland during winter season and there is definitely **big potential also during other seasons.** Often French visitors who have visited Finland in winter are curious and interested to see Finland also in summer. Also different **niche target groups are interesting and potential for spring, summer and autumn seasons** (sportive travellers, outdoor active travellers, photographers, cultural travellers etc.).

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Trends and other relevant travel related topics

Trends

Big trends in France for the moment are **ecology and green values**. Sustainable travelling is becoming important. During their travels French are looking for **do-it-yourself and live like a local experiences.** They want to get to know **local people and way of living** and also **learn new things** during their holidays. **Wellbeing** and **slow travelling** are also big trends in France and many of the tour operators have already developed products around these themes.

New distribution channels

There are **new tour operators interested** in Finland's offering and also existing tour operators (already selling Finland) who want to **enlarge their Finland product offering**. Summer has been promoted actively to B2B actors (destination trainings and tools) and this needs to be done continuously. **Famtrips** are important and a good way of presenting the offering and new products to operators. Presence in online channels (OTAs) is also important as French FIT tourists are more eager to book their trip to Finland by themselves in summer than in winter.

Online channels

Majority of the French travellers are using different online and social media sources (facebook, instagram, travel blogs, travel theme websites, OTAs etc.) **when looking for new travel ideas (inspiration),** in **planning phase** or in **bookings**. Visibility in these channels can be assured by **paid visibility (campaigns and advertisement), PR work, and in cooperation with selected tour operators** or other travel partners.

Trends and other relevant travel related topics

Competitors' actions

Norway is very active in promoting summer and reinforcing their already strong summer image. Norway's campaigns are in **online channels, printed media and also in OOH** supports (sometimes together with Hurtigruten). They do **active PR work** and do have also active social media channels (Facebook) in French language. The messages concerning summer are **outdoors activity possibilities, astonishing nature, and also city and cultural destinations (mainly Oslo and Bergen).** Norway is **active in B2B actions** (Fairs, workshops etc.) both in leisure and meeting industry sectors.

Denmark is active in online channels and social media. Their main messages are **city break holidays (Copenhagen)** and **family friendly Denmark**. Denmark has been having big growth from France since few years.

Canada is **promoting actively summer** and is visible in different **online channels** and social media. They do advertising in printed media and sometimes in OOH supports. They do also **active PR work**. Canada does **B2B training webinars** and is participating in **big professional events (fairs)**. Their message is very similar to Finland's message with nature activities and relaxing holidays by the sea or lakes.

Iceland has campaigns in **online channels, social media and through PR work**. Their messages are **stop over products, natural wonders and meet the local experiences.** They do **active B2B work** and Iceland products has steadily grown in TOs offering. But they do have a capacity problems and sometimes image is getting a negative touch ("mass tourism").

Sweden is active in **PR work and online marketing.** Their message is around **city breaks and family holidays**. Sweden doesn't do B2B actions in France (Visit Sweden), but some of the regions are doing direct actions with the French operators (famtrips etc.).

Visit Finland

Trends and other relevant travel related topics

Free word

French are travelling a lot **in their own country**, both in winter (Alpes), but also in summer (South of France & Brittany). Nevertheless during **last years outbound travelling has grown** and French are looking for new destinations. **Green values and nature travels** are popular and especially people living in big cities are looking for nature destinations.

Finland has the right offering for stressed French travellers **looking for a calm and safe destinations for relaxing holidays**. There has been lots of events and political problems lately in France and people are looking for places to ”escape” during their free time.

Finland is **not yet very well known as a summer (or autumn) destination** and we need to **continue our PR work** and other communication actions to **reinforce the image** and to attract the **big potential target groups** from the French market. Regions’ support in these actions is needed and is essential to have an enough big impact.

France – Market Review

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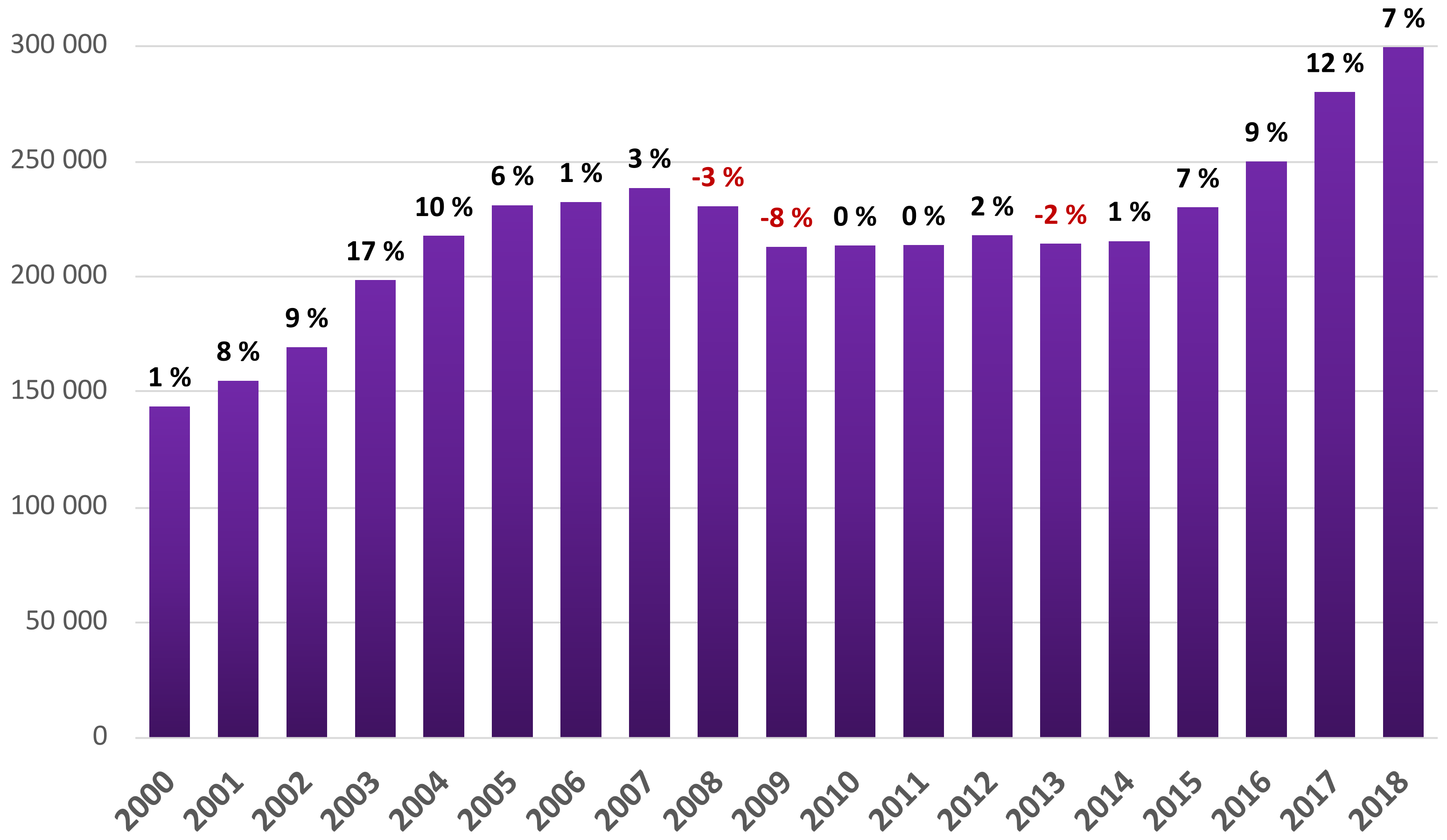
French overnights in Finland



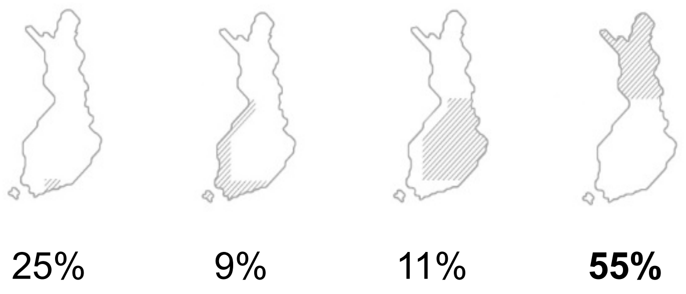
Year 2018

6th in country rankings
with a **4% share** of foreign overnights

Average change 2000-2018: **+4%**

Change 2018 compared to 2000: **+108%**

Share of overnights by regions 2018



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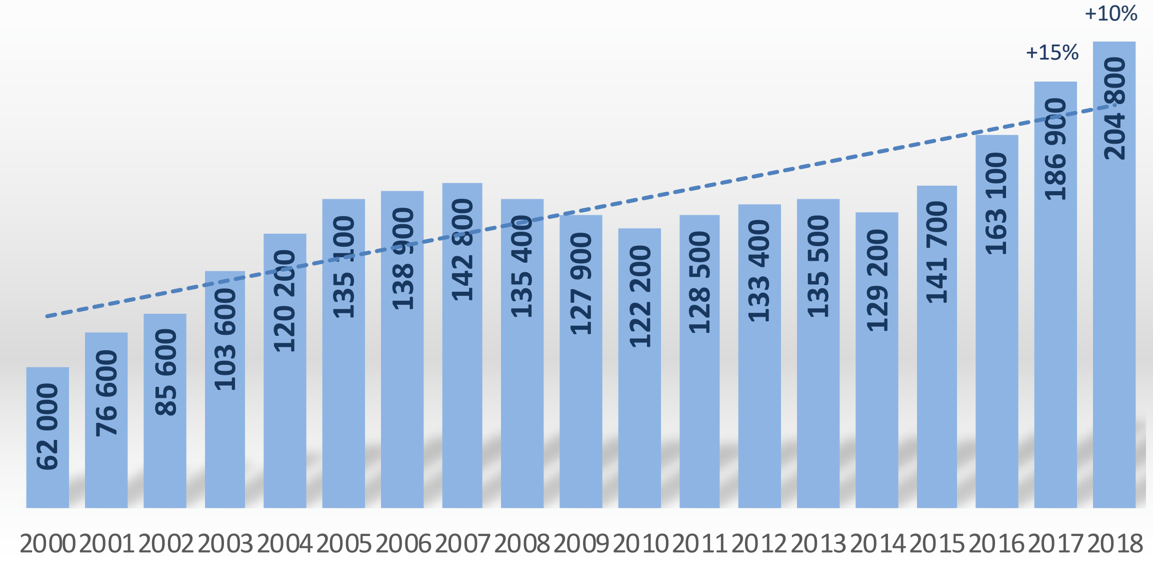
Sources: Visit Finland Statistics Service Rudolf, Statistics Finland

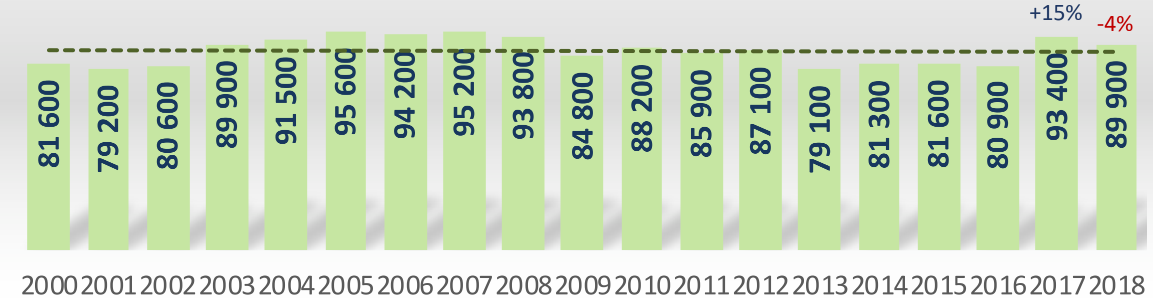
French overnights in Finland

Winter and Summer 2018

Registered overnights in winter season (Nov-Apr) by French visitors



Registered overnights in summer season (May-Oct) by French visitors



Winter 2018: **4th** in country rankings with a **6%** share of foreign overnights

Average change 2000-2018: **+7%**

Change 2018 compared to 2000: **+231%**

Summer 2018: **10th** in country rankings with a **3%** share of foreign overnights

Average change 2000-2018: **+1%**

Change 2018 compared to 2000: **+10%**

Visit Finland

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

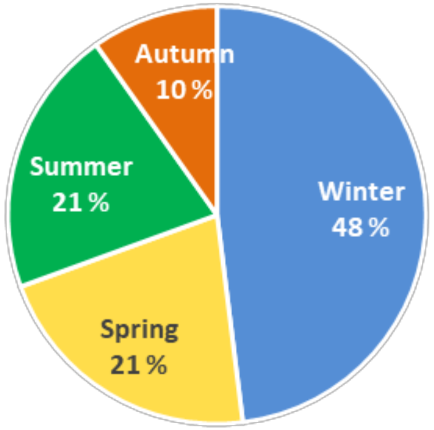
French overnights in Finland

Seasonal overnights in 2018

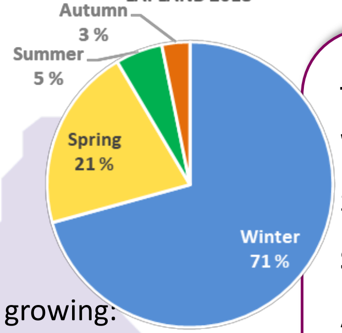
Whole Finland	No. of French overnights				Seasonal YtoY change		
	2016	2017	**2018**	**2019**	2017 vs. 2016	**2018 vs. 2017**	**2019 vs. 2018**
Winter (Dec-Feb)	114 200	129 600	**141 300**	**162 400**	+13%	**+9%**	**+15%**
Spring (Mar-May)	49 900	60 400	62 900		+21%	+4%	
Summer (Jun-Aug)	54 900	61 000	**61 000**		+11%	**0%**	
Autumn (Sep-Nov)	26 600	30 400	29 000		+14%	-5%	

French overnights in Finland by season in 2018

WHOLE COUNTRY 2018



LAPLAND 2018

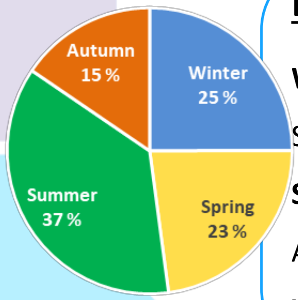


Lapland

Winter 2018:	**112 200**	**(+9%)**
Spring 2018:	32 900	(+7%)
Summer 2018:	**8 400**	**(-9%)**
Autumn 2018:	5 000	(+2%)
Winter 2019:	**130 100**	**(+16%)**

Importance growing:
- **Tunturi-Lappi**
- **Rovaniemi**
- **Inari (Saariselkä)**

LAKELAND 2018

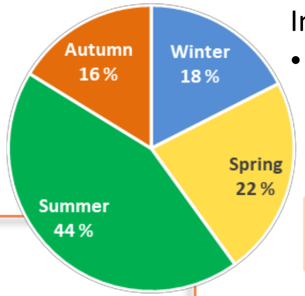


Lakeland

Winter 2018:	**8 600**	**(+6%)**
Spring 2018:	7 900	(+12%)
Summer 2018:	**12 600**	**(-1%)**
Autumn 2018:	5 300	(-6%)
Winter 2019:	**8 900**	**(+4%)**

Importance growing:
- **Tampere**
- **Kainuu**

COAST AND ARCHIPELAGO 2018

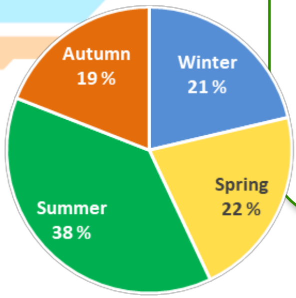


Importance growing:
- **Oulu**

Coast & Archipelago

Winter 2018:	**4 700**	**(-6%)**
Spring 2018:	6 100	(+9%)
Summer 2018:	**11 800**	**(+9%)**
Autumn 2018:	4 400	(+4%)
Winter 2019:	**5 500**	**(+17%)**

HELSINKI REGION 2018



Helsinki area

Winter 2018:	**15 800**	**(+15%)**
Spring 2018:	16 100	(-5%)
Summer 2018:	**28 200**	**(0%)**
Autumn 2018:	14 200	(-9%)
Winter 2019:	**17 800**	**(+13%)**

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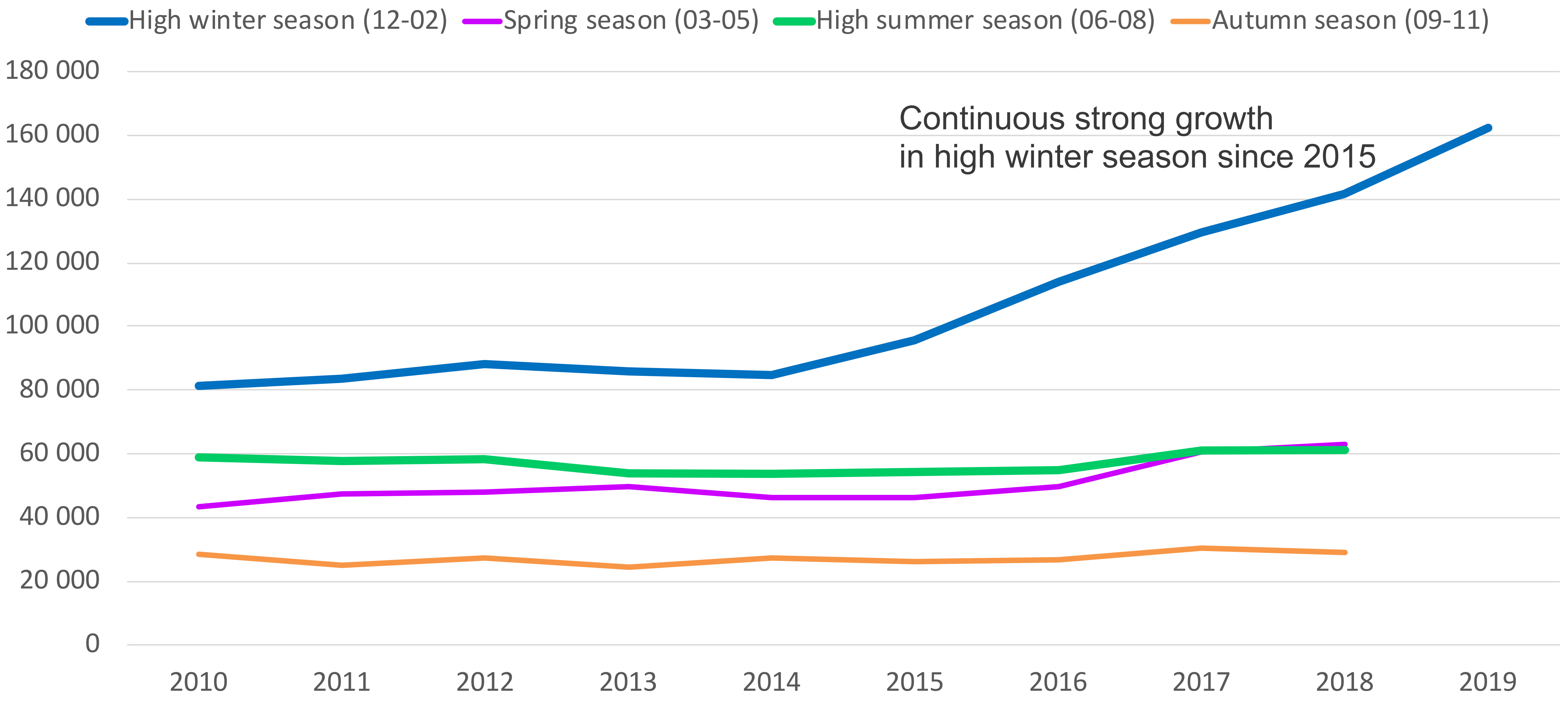
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Trends for seasonal overnights in Finland – French visitors



Source: Visit Finland Statistics Service Rudolf, Statistics Finland