VF France Market Report
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Visit Finland Country Representative

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Semiannual Report – FRANCE

Summer season 2019 and outlook for winter 2019-20

CONTENTS

Visit Finland

Factors affecting the results of the summer season 2019

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

Overall outbound travelling from France had a **little decrease during this summer season**. Last summer (2018) was very good (big increase) and therefor this year's little decrease was not worrying. **Travelling inside France during the summer grew** (+5,6 %)[1.] . **Economic situation is quite good** and stable. **Political situation has been unstable** since one year (e.g. protests of "yellow" jackets) and is causing some **delays in reservations** (reservations made later than normally). Nevertheless it hasn't caused big decrease in figures.

Security situation in **North Africa is stable** and **outbound travelling from France to Africa increased** (+ 6,6%) also this summer season. **Morocco, Tunisia and Egypt** (around + 50-60 %) were popular and also Turkey and Emirates (around + 40 %) got a big increase**. Southern European and Eastern European countries had surprisingly a decrease** (around - 15 %).

Holiday season remained same than previous years. The main holiday season is **August, especially for the families**. Most of the summer holidays are done in August, but some increase can be seen also in July and September. May is mostly short breaks holiday season with many public holidays and long week-ends.

Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

Finland got an **increase this summer season** (+ 5 %). **Summer image** is slowly but surely **becoming better** and demand is going up. Finland is still expensive compared to our competitors because of **high flight prices** and therefor our Nordic competitors got better increase in figures than Finland. Flight prices are influencing even more the decisions concerning summer travelling than winter travelling (to Lapland).

Even if Finland's summer image as a travel destination is getting better, efforts are still needed to reinforce the image and to get to the same level than our competitors (especially Norway and Denmark).

There were **no big changes in distribution**. Some **new products were launched** (e.g. Cultural package to Turku region, Summer Lapland package, Lakeland retreat package…) for this summer season and some **new operators** added Finland to their summer product range (e.g. OTA - Voyage Privé).

This summer season the **accessibility from France to Finland was good.** There were 5 Finnair's direct flights per day from Paris and 3 Norwegian flights per week. Also seasonal flights from Bordeaux and Nice were operated. Nevertheless the situation of Norwegian is unstable and direct flights from Paris have been reduced. This might affect the coming seasons.

Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

In this summer season, **Fly & Drive packages were attractive**, but also **hiking and nature trips to Lapland**. Tours combining city and nature are popular too. Also tours combining 2-3 northern countries or Baltic countries are selling well.

Biggest growth was in Helsinki region. All the other main regions had a little decrease.

Rent a Finn campaign got a nice visibility in France and reinforced the image of “way-of-living” in Finland. Also some **joint promotions campaigns** were done in spring (together with Voyage Privé, 66 Nord, Terres d’aventures) and those resulted also in new products and better visibility.

Outlook for the coming winter season 2019-20

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

Coming **winter season looks good** and there probably will be an increase compared to last winter season. According to main operators selling Finland, the **sales are in advance compared to last year**. Nevertheless, the **situation with Jet Tours (Thomas Cook France)** is still unsure and effects are difficult to estimate. This might have a small impact to this winter season's figures.

Main and most popular winter products are still **multi activity packages**. Besides all the "classical" outdoors activities, French travelers are also looking for **more "cultural" experiences**; they want **to get to know the local culture** and have **live-like-a-local experiences**.

There are some **new operators** starting to sell Finland this winter. Many of the established ones are also adding **new products and new flights** to their offering. Joint efforts (joint promotion and training) are done together with the main tour operators to develop the sales and to train their resellers.

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Outlook for the coming winter season 2019-20

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

What are the trends for the winter 2019-20?

French are looking for **safe and relaxed holidays**. Sunny destinations (as French DOM TOM islands, Mexico, Thailand etc.) are popular, but on the other side also outdoors winter activity holidays are demanded. Northern countries are still trendy and nature activities very appreciated, especially for people living in Paris area (or other big cities). On the other side North Africa is attracting again lots of French travelers and especially budget wise travelers.

Which are the traveler segments?

Concerning the winter season, Finland attracts **different type** of French travelers. During the school holidays (Christmas, New Year, February winter holidays and Easter holidays), there are **families willing to enjoy and discover Finnish Lapland**. **Incentive groups** are also important part of French travelers arriving to Finland and the demand is growing steadily. Many meeting industry agencies which have been selling Southern European destinations, are now looking for other destinations, especially in Northern Europe.

Outlook for the summer season 2020

Ad hoc marketing opportunities

Finland's **image as a summer destination** is not yet very strong in France. It is getting better with all the efforts done (PR, joint promotions, TO cooperation etc.), but it **still needs to be reinforced**. PR work is primordial part of the image building and lots of efforts are and will be put in summer promotion through different PR actions (press trips, influencer trips etc.).

Concerning summer **products and new production**, there are more and more operators willing to develop their offering in summer and therefore are eager to discover different regions and products **through famtrips**. There will be different famtrips organised in spring and summer 2020 to push new production in France.

Nordic Workshop will take place in Paris 6.2 and in Lyon 5.2. It is a good **opportunity to meet French buyers** face to face and to get to know French market better.

Prospects for the autumn/winter season 2020

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 winter is strong, but it is important **to keep our good position as a main winter destination in Nordics**. It would be important that **authenticity remains** and that **travellers get real and authentic experiences**. As Lapland is already very demanded it would be important that also **other regions have good offering of winter activities** (multi activity package possibilities).

Autumn is very potential season for French travellers, especially **for hikers and outdoor travellers.** It would be important that all the services are available also in September/October. French travellers need and use all type of services available during their holidays.

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

Concerning autumn, **travellers looking for outdoors activities** (hikers, bikers etc.) are potential for Finland. This target group has wide age range and different profiles. Besides active younger hikers, we could also attract more **active senior travellers**.

Prospects for the autumn/winter season 2020

The overall outlook of travelling to Finland?

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

For winter the demand is already high and attracting different target groups for Lapland. Concerning winter products in other regions, we could attract different type of target groups; for example **those having lower budgets** or those looking for silent places out of the main destinations.
Sportif visitors are also potential and "extreme outdoor activity" happenings/trips are becoming popular (e.g. Finland trophy in Lapland). Also more **relaxed yoga/meditation/wellbeing/soft nature activity holidays** are growing. Finland could also have more offering for this type of visitors.

Sport or educational groups are very potential target groups for Finland and are travelling often out of the high seasons. Interest in Finland is growing among the educational travel operators and they are looking alternative options for countries already visited (especially in Southern Europe).

Theme check: Food tourism

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

What is ”in” on your market in food tourism? Is food important for travellers on your market?

Food is **very important** in France and when travelling French are willing to **discover the country's food culture**. They expect that during their holidays they can have new culinary experiences and discoveries. As in many countries, importance of **use of local food** and local ingredients had become important also for the French. They are also paying more attention to how the food has been done or grown (organic or not etc.).

How would a core message ”Pure, clean Finnish food” work on your markets?

Very well. Finland is known as a nature destination and a country who respects its nature. Visitors are supposing that food is local and clean. Still, we could communicate more about it.

Is there any specialized tour operators for food tourism? Are "general" tour operators promoting food experiences?

There are not really any food specialised tour operators. Some influencers are starting to ”organise” followers' trips with food themes. General tour operators are not mentioning or promoting often food, which is probably just a question of lack of information. Nevertheless in selling process they still need to explain often how is Finnish food (as the end clients are very curious about it).

Theme check: Food tourism

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

What kind of food tourism offerings should be developed more in Finland? E.g. food related activities in nature (like foraging/picnic in a forest), cooking classes (like baking Karelian pies), food walks, home dining, food producers tours, local/Finnish restaurants, beverage tours/tastings, sustainable food, food routes etc.?

Do-it yourself products are trendy and French visitors want to **learn something new** during their holidays/trips. Also **family products** (cooking all together or mushroom "hunt" in the forest) are popular. It would be interesting also to do some regional food tours explaining local specialities and have good "food maps" for the fly & drive clients.

The best benchmark and examples (destinations or products)?

Italy is a good example of food tourism country. They have different travel products around food and visitors go to Italy also because of food. France has also developed tourism around gastronomy and there are some nice operators organising food related tours and experiences (for example: https://www.laroutedesgourmets.fr/en/).

What kind of activities could work best for food tourism on your markets (image marketing, product marketing, PR, etc.)?

PR is important concerning promotion of Food culture and food tourism. Industry crossover cooperation is also needed for that Finnish food is getting better known in France. This goes also together with active image marketing.

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Trends and other relevant travel related topics

Trends

French travellers, especially those living in big polluted cities, are looking for "**revitalizing" nature holidays**. This can be seen even in travelling figures inside France; Mountain destinations are more popular and **nature-outdoor activites more demanded**. Finland has lot of potential concerning this tendency and also for developing all year around tourism.

French are using **mobile devices and online booking** more and more. Often the preparation phase of the trip is done totally online and the purchasing phase partly online and partly through agencies. Therefor online visibility, good accessibility and user friendly websites are primordial (and need to be easy to use even with a mobile). Concerning the millennials, they are booking even more directly and the role of the website is very important and online presence is a must.

Another trend at the moment is **personalised services**. Travellers want to feel that something was planned and done just for them. Tourism actors in France (TOs and agencies) are developing different methods to be able to respond this demand. It means that some **flexibility is needed in product development** (part of the product/package needs to be possible to tailor-made or change).

Trends and other relevant travel related topics

New distribution channels

French market is going through big changes (bankruptcies of airline companies, problems of Jet Tours – Thomas cook). Competition is hard and roles of different operators are not always very clear. Probably those changes will result a more clarified roles and distribution networks. Some operators are also late in online development and are now force to put effort in adding their online presence. **OTA channels are becoming important** and cooperation with them is necessary; Development of content and products are needed following joint efforts in marketing.

There are also **new tour operators interested in Finland**. Often they have been selling other European countries and want now to enlarge to Nordic countries. For the new operators, famtrips and workshops are the best ways to start the cooperation and product development.

Online channels

Online channels are **important part of the French's travel planning and booking**. Majority of French are using different online and social media sources (facebook, instagram, blogs, travel theme websites, OTAs etc.) **when looking for new ideas or when booking their trip**. Visibility in these channels is reached through active **PR/Influencer work, paid visibility (OTA) and in cooperation with tour operators or other partners in their online channels.**

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Trends and other relevant travel related topics

Competitors' actions

- **Sweden** is active through PR work and B2C marketing campaigns (online). They are also active in social media channels. Main messages are **city breaks in Stockholm or family friendly holidays**. Sweden doesn't do B2B actions in France.

- **Norway** is the **most active** among the Nordics. They did **active summer promotion also for this summer season to** keep their summer image strong. It was done through PR work and advertising. The summer messages are **sustainable outdoors activities and awesome nature, Hurtigruten cruises, but also city and cultural destinations and activities**. Norway do **active B2B work** (Fairs, workshops etc.) and both in leisure and meeting industry sectors. Norway is active in PR communication and social media channels (in French).

- **Denmark** is also active in France and communicates through **PR work and visibility, and social media**. Denmark's main messages are **family friendly holidays and city-breaks holidays**. They work together with tour operators (B2B actions) but are also targeting direct FIT tourists through active B2C communication (events and online campaigns).

- **Canada** was **actively promoting summer** through B2C promotion and is well visible in different **online and social media channels (in French).** They do also **active PR work**. Canada does many **B2B actions** (workshops, famtrips etc.) and is present in **B2B events** (as IFTM Top Resa Fair in Paris or workshops).

- **Iceland** was active for their summer promotion in **online channels, social media and through PR work**. Main messages are **stop over products, nature wonders and meet the local experiences.** Iceland is **active in B2B work** (events and fairs) and is working closely with Iceland Air. Lately they have been communicating actively on sustainability and sustainable travel to Iceland.

Trends and other relevant travel related topics

Free word

French market is **stable market which steady growth**. Finland has a **good position** in the market and **good image as a country**. The **potential is big** and tendency is now more on **outbound travelling**.
Finland is attracting many French tourists in the winter time and we have managed to keep this development ongoing since many years. Nevertheless **summer needs efforts and participation** of different actors. Summer image needs to be reinforced and more products to be developed. We have lot of potential destinations in Finland and many summer activities to be discovered by the French travellers. We just need to assure **the accessibility** and **the quality of the products and services**.

France – Market Review

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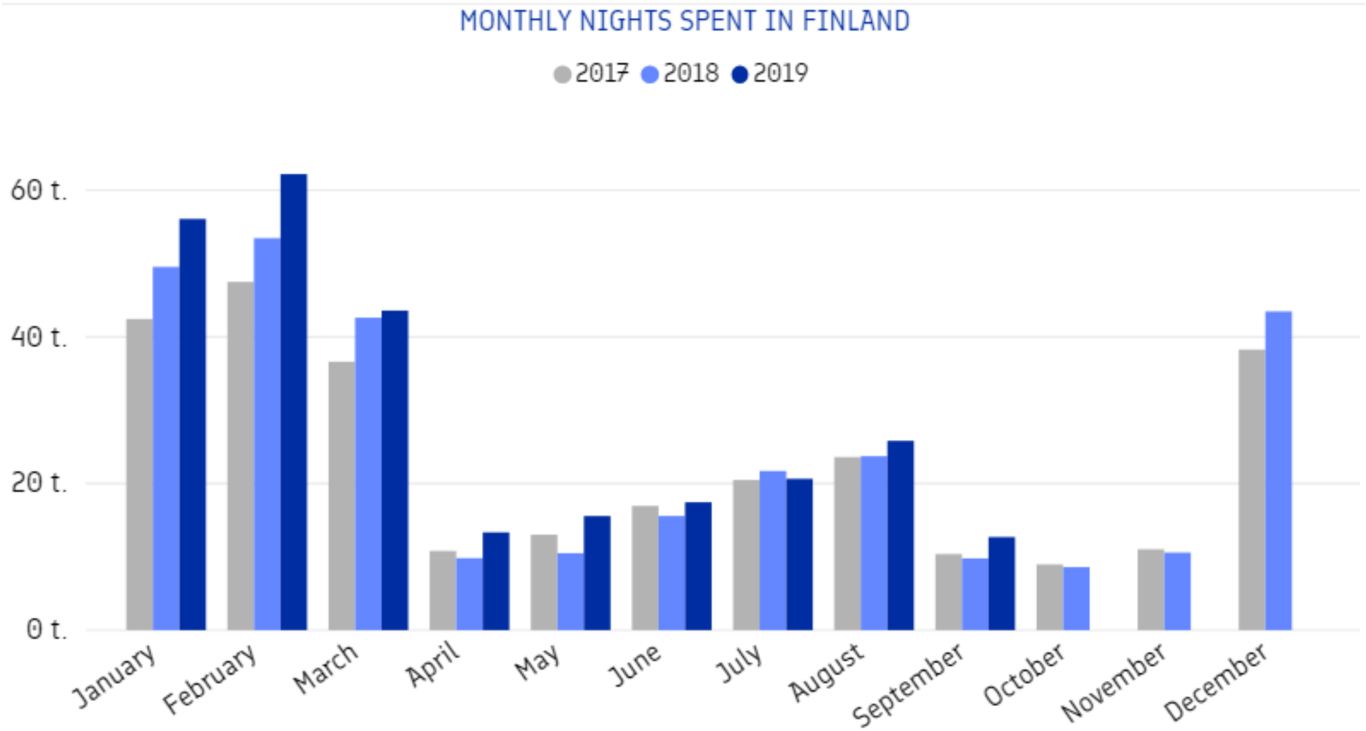
French overnights in Finland



Year 2018

6th in country rankings
with a **5% share** of foreign overnights

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

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

Share of overnights by regions 2018

25%	9%	11%	**55%**

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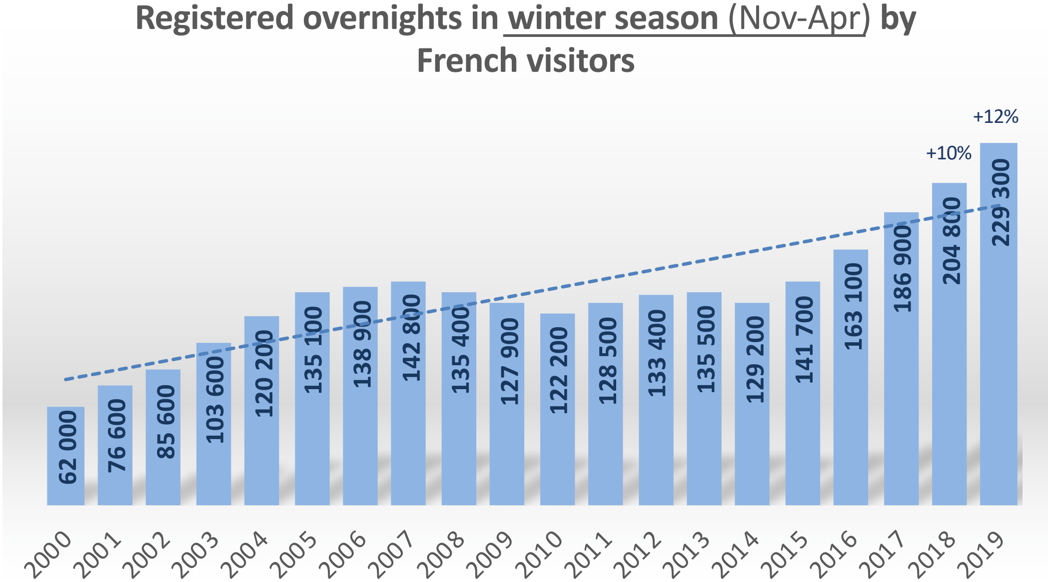
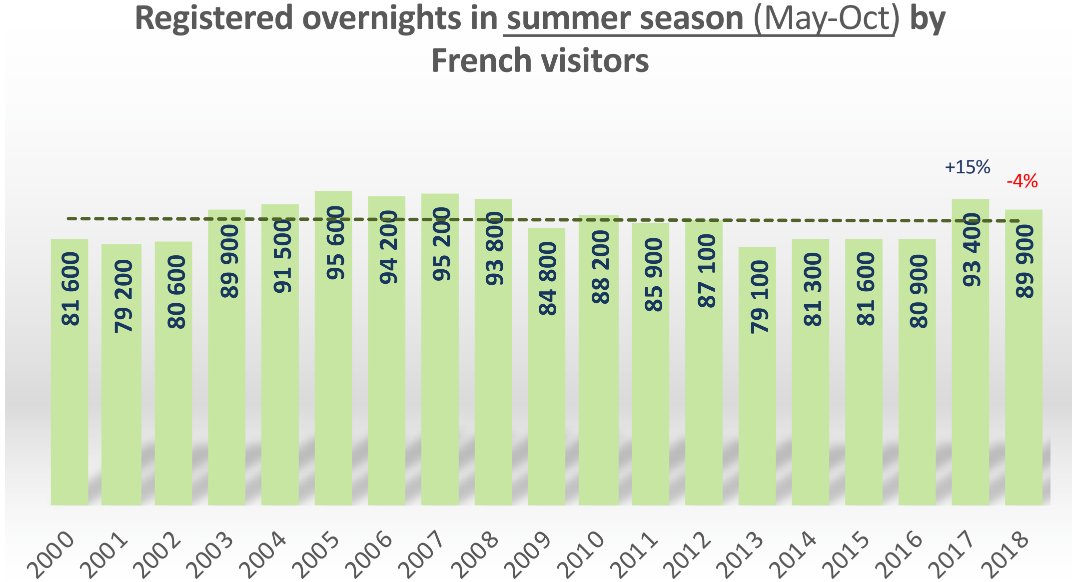
Sources: Visit Finland Statistics Service Rudolf, Statistics Finland

French overnights in Finland

Winter 2019 and Summer 2018





Winter 2019: **4th** in country rankings with a **7%** share of foreign overnights

Average change 2000-2019: **+7%**

Change 2019 compared to 2000: **+270%**

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

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

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

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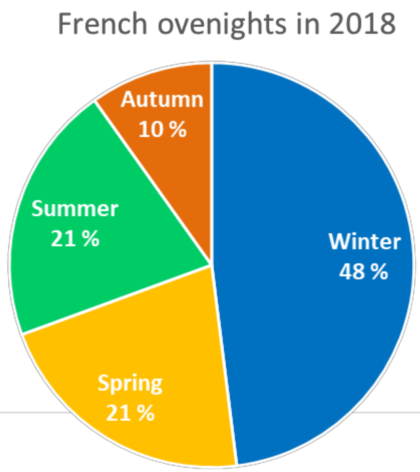
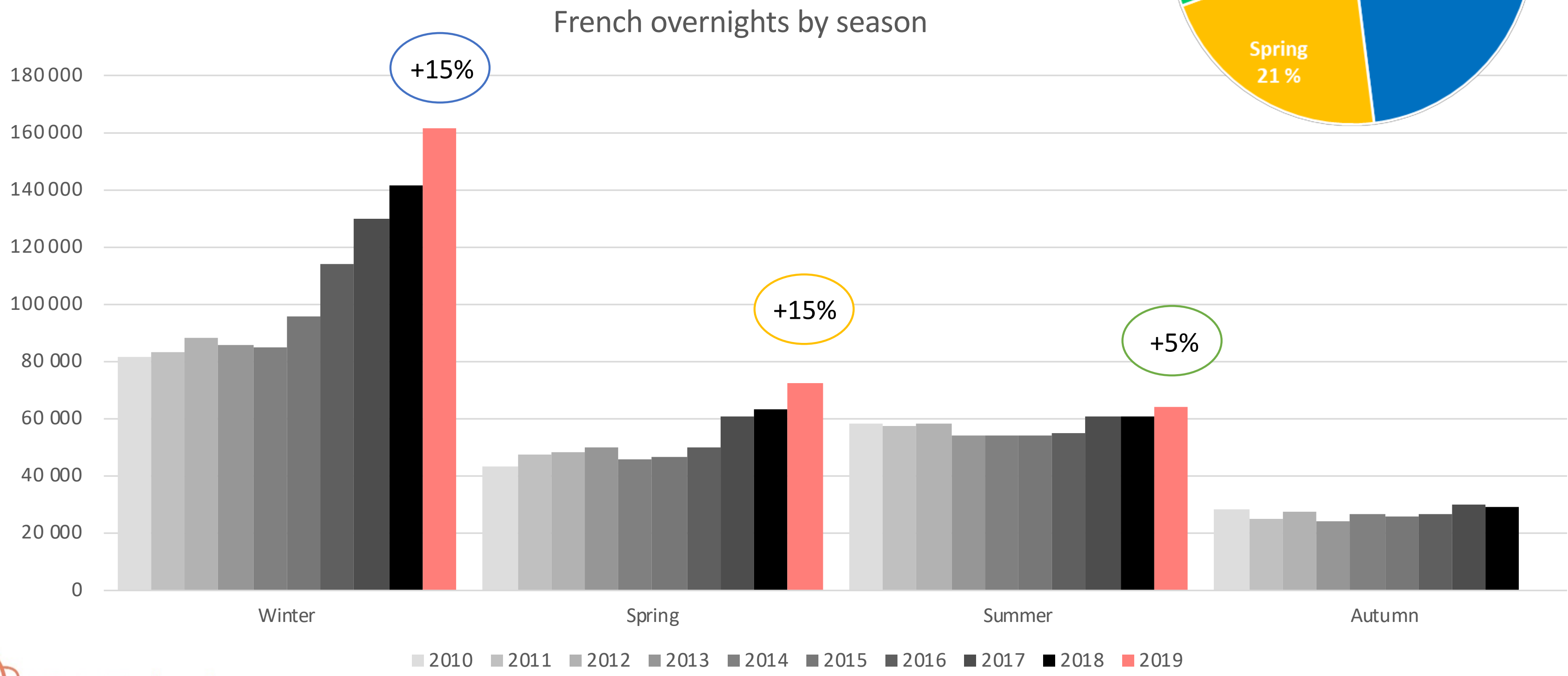
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Trends for seasonal overnights in Finland
French visitors

Winter is the most popular travel season among French visitors. Growth also in spring and autumn travel.





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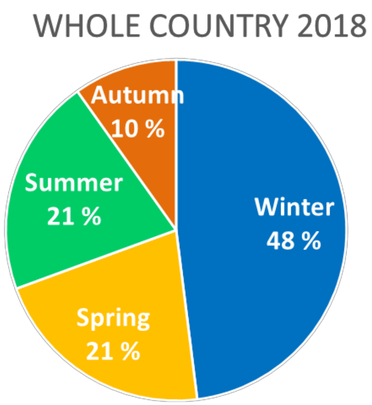
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

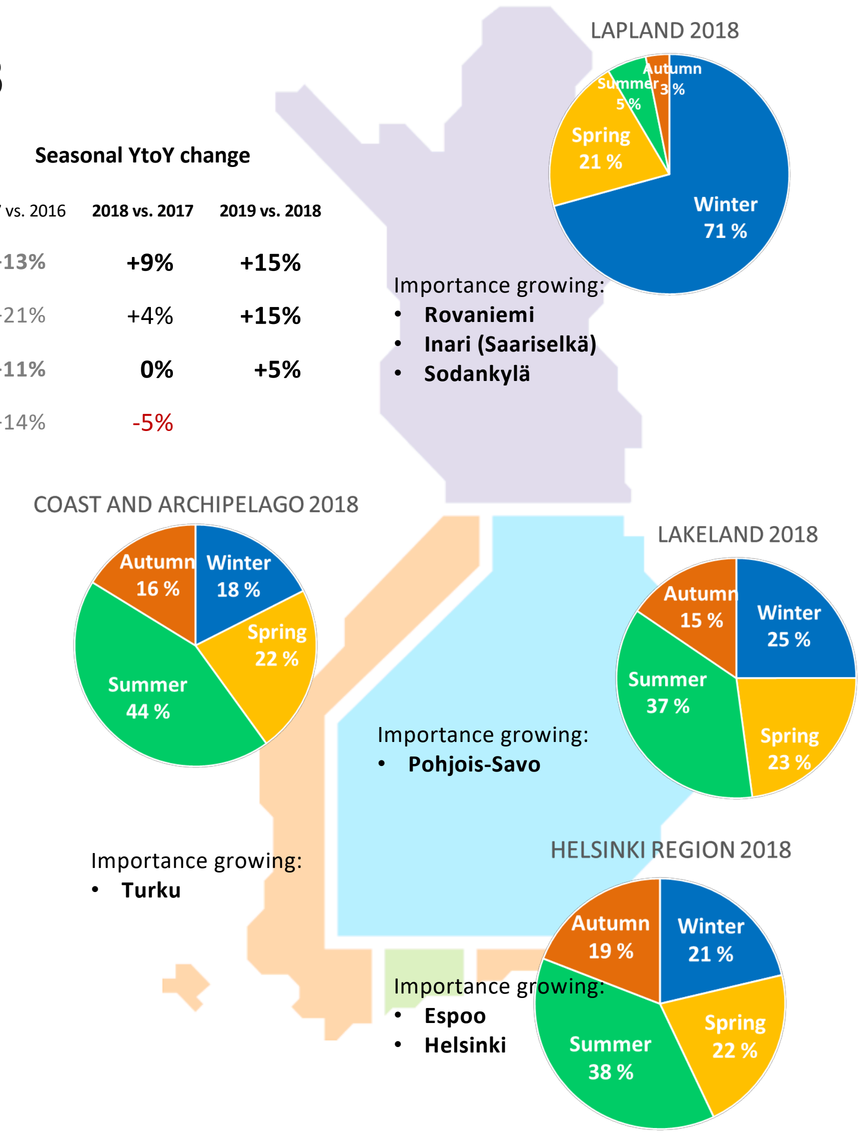
French overnights in Finland

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**	**161 800**	+13%	**+9%**	**+15%**
Spring (Mar-May)	49 900	60 400	63 000	**72 500**	+21%	+4%	**+15%**
Summer (Jun-Aug)	54 900	61 000	**61 000**	**63 900**	+11%	**0%**	**+5%**
Autumn (Sep-Nov)	26 600	30 400	29 000		+14%	-5%	

French overnights in Finland by season in 2018





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