

Japan

Travel insights



Visit Finland

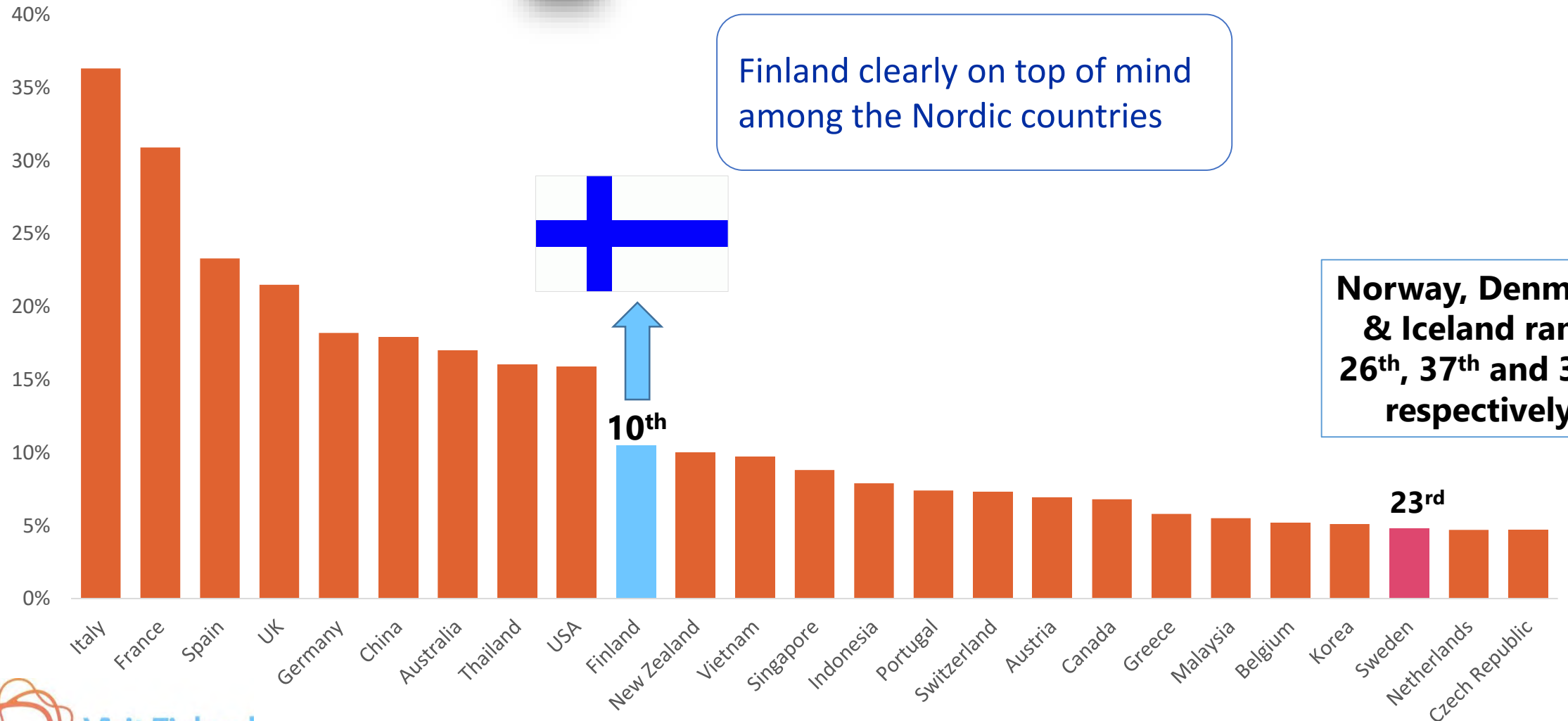


Finland's image as a travel destination in Japan

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

Spontaneous Destination Consideration



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)

The northern lights, Santa and the Moomins all come to mind with the Japanese when thinking about Finland, as are the saunas and the nature

Spontaneous Impressions - Finland



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

The closest country in Europe, convenient for airplane transfers.

Moomin village. The city of Santa.

I want to see the aurora

Moomin, lakes, glacier midnight sun.

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.



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

Beautiful nature

Town of Santa Claus.

Country of nature are many lakes and forests.

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



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 2019

Japan

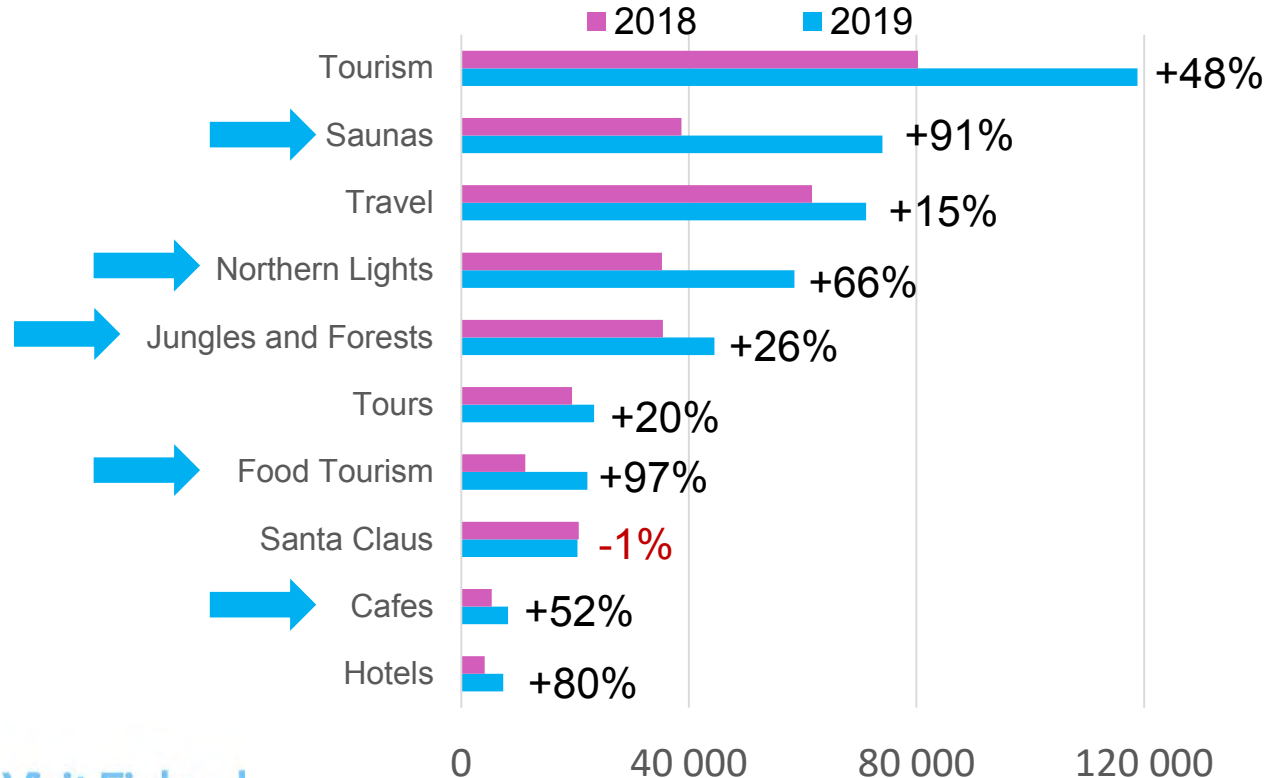


No. 1 in ranking in absolute numbers.

556 800 travel-related Internet searches concerning Finland in 2019.

+37% compared to previous year.

Top Micro-brandtags

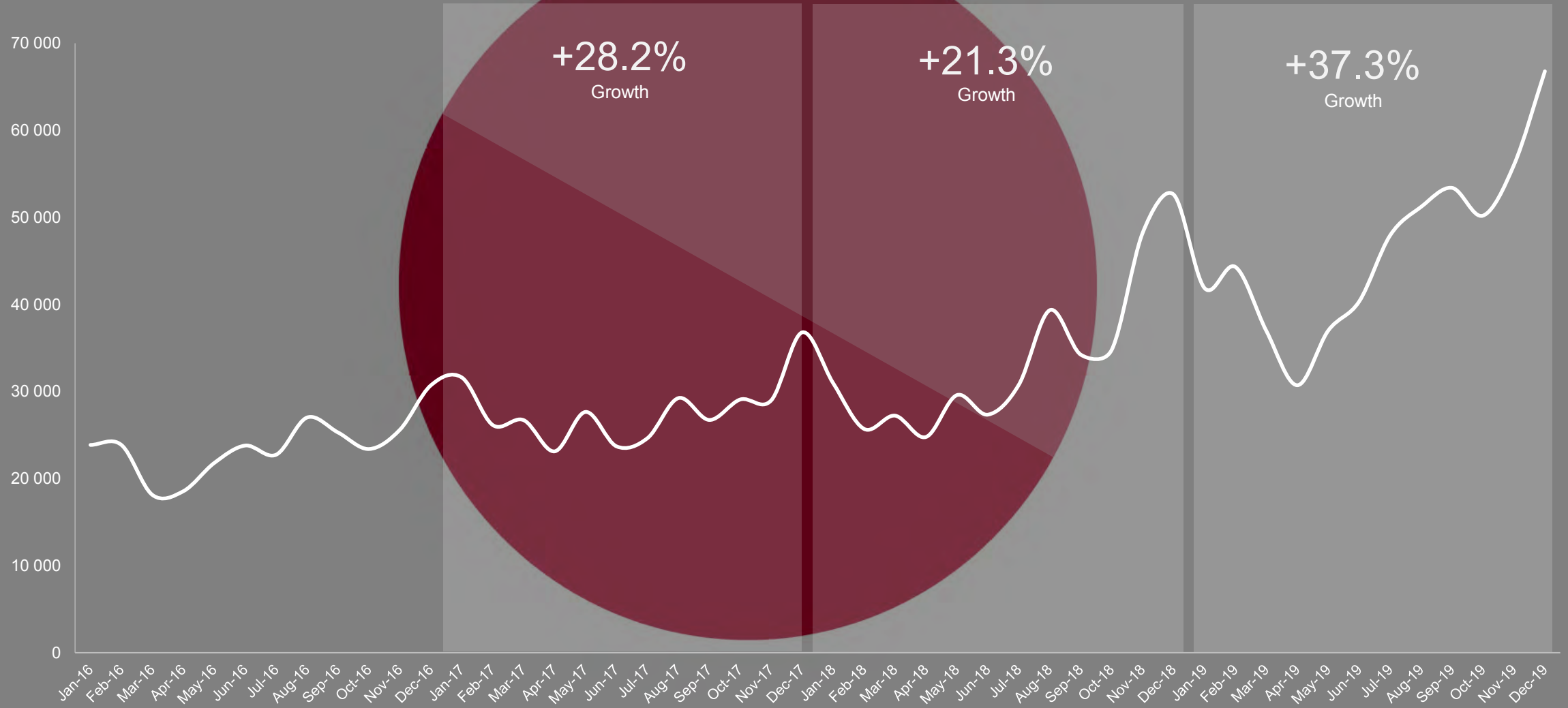


TOP 10 TRENDING MICRO-BRANDTAGS

Micro-brandtag	Δ%
Food Tourism	97 %
Saunas	91 %
Hotels	80 %
Natural Wonders	72 %
Northern Lights	66 %
Tourism Attractions	59 %
Cafes	53 %
Tourism	48 %
Museums	44 %
Cathedrals	41 %



Evolution of searches of the Japanese target market





100

FINLAND JAPAN

フィンランド 日本 2019

Life Money

says that there is no water bath in Sauna's home country "Finland"

Posted on: Aug 11, 2019 16:00

東洋経済

TOYOKEIZAI

ONLINE

Sauna gathering! Japan's largest sauna festival held in Nagano

2019/08/12 TABI LABO editorial department



The boom is sparked by manga artist Katsuki Tanaka.



SAUNA
FES 2019
VOL.04
JAPAN

FINLAND VILLAGE

9.21 | 9.22 | 9.23

SAT 10:00-18:00 SUN 10:00-18:00 MON 10:00-17:00

WWW.SAUNAFESJAPAN.COM

The Finnish "World's Best Happiness"

How richness and forgiveness are nurtured



2019.2.7

Aurora appreciation in Northern Europe Finland! -Tips for enjoying a photography trip
Photographer Kakita Miho x Scandinavian Travel Fin Tour Tetsuya Miwa



In search of the Northern Lights of Finland

Commemorating the release of the best love story movie "Yuki no Hana"

Feel All The Feels This Love Month With The Movie Snow Flower



✚ Happiness ranking No.1 country with red aurora and Finland! Be happy when you watch the movie "Snow Flower"! ?

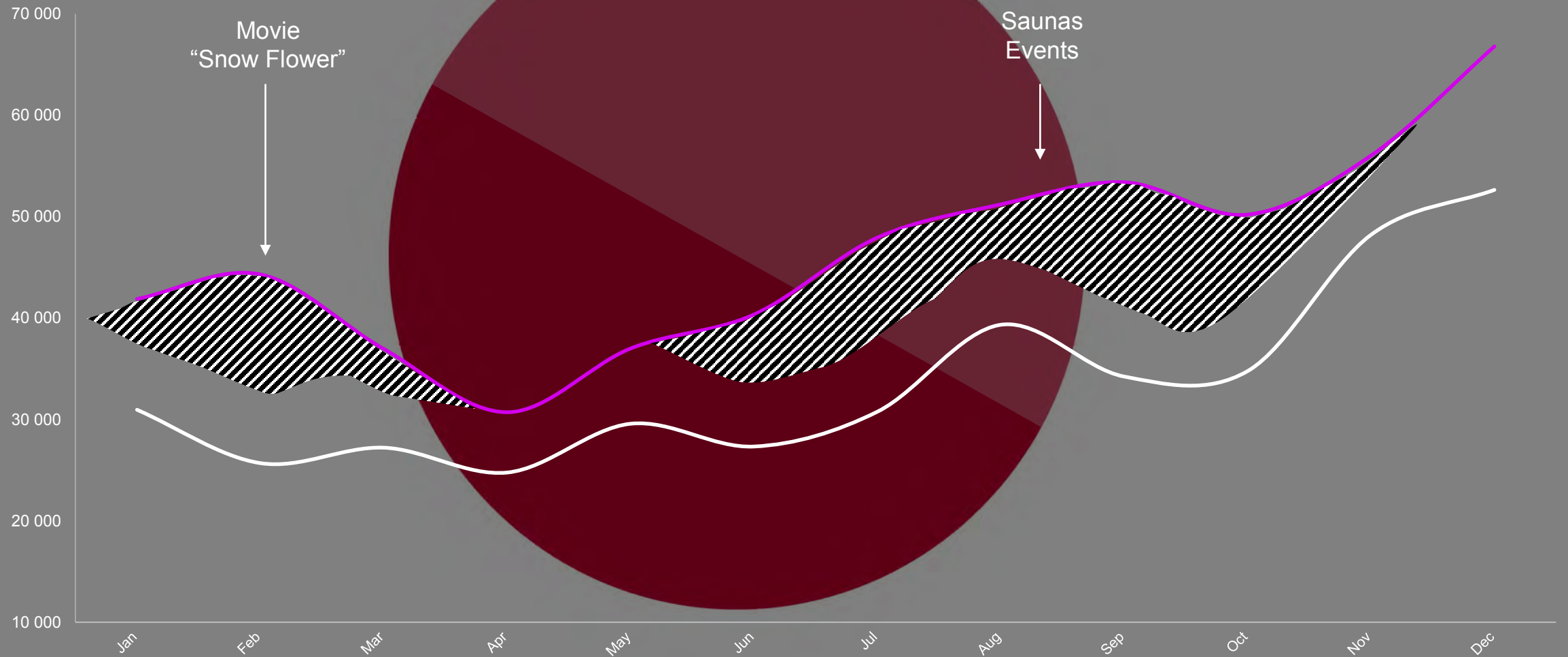
News & Report Editor

February 04, 2019



THE HISTORIC GLO HOTEL ART AS ONE OF THE FILMING LOCATIONS OF THE JAPANESE SNOW FLOWER MOVIE

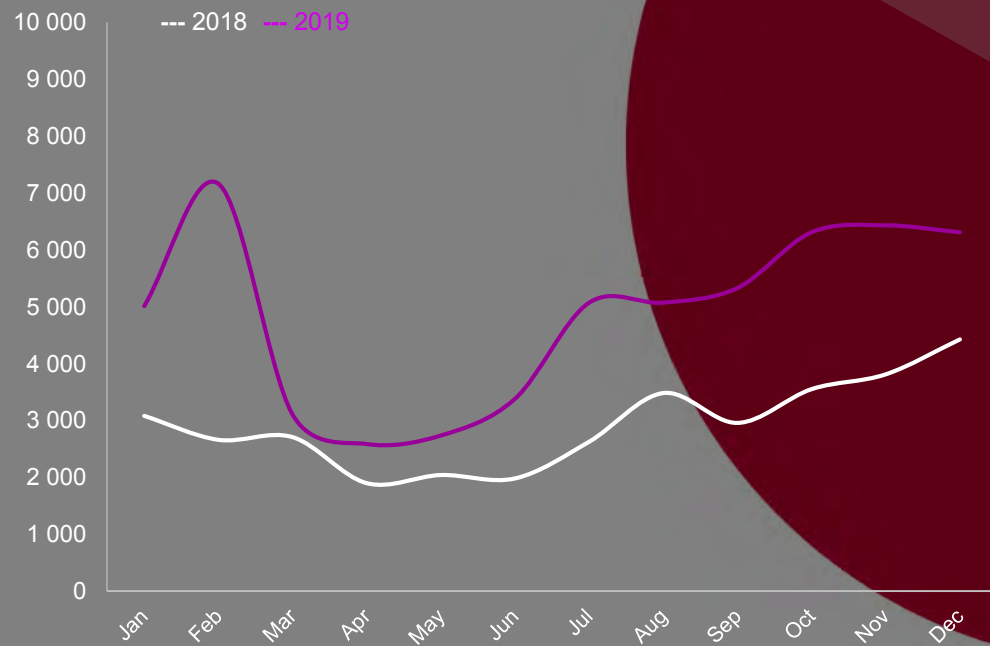
Japan



Japan

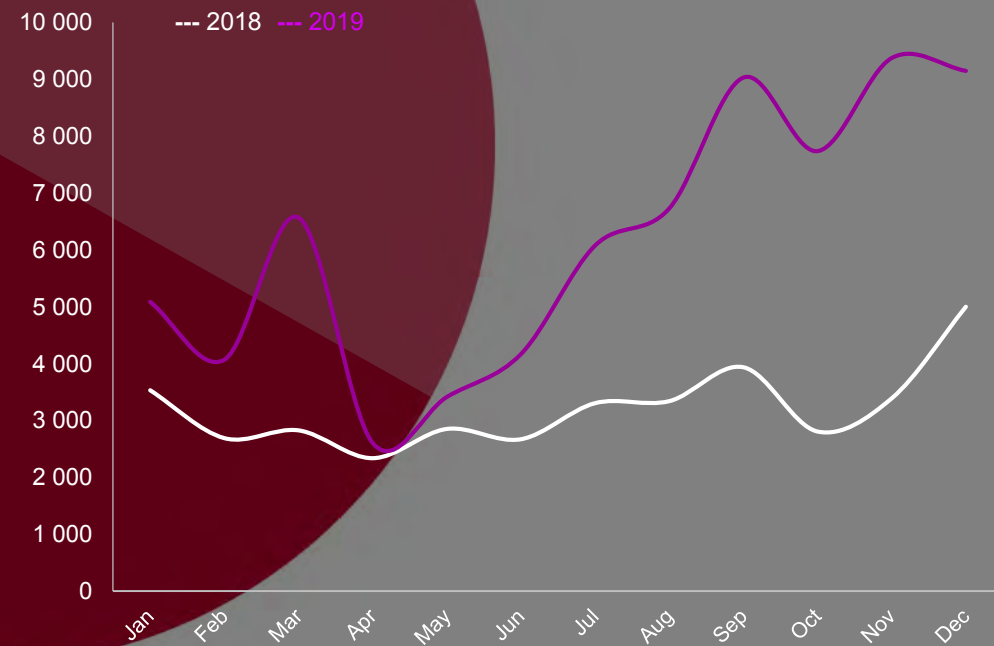
Northern Lights

growth = +66,0%



Saunas

growth = +91,4%



An aerial photograph of a coastal landscape. In the foreground, a rocky shoreline leads to a small red cabin with a grey roof and white window frames. The cabin is surrounded by green grass and some purple flowers. To the left, a calm body of water reflects the sky. In the background, a dense forest of tall evergreen trees covers a hillside. Further back, a larger body of water is visible, with a small lighthouse or tower on a distant island under a cloudy sky.

Japanese overnights in the Nordic countries & in Finland

Statistics Service Rudolf, Statistics Finland

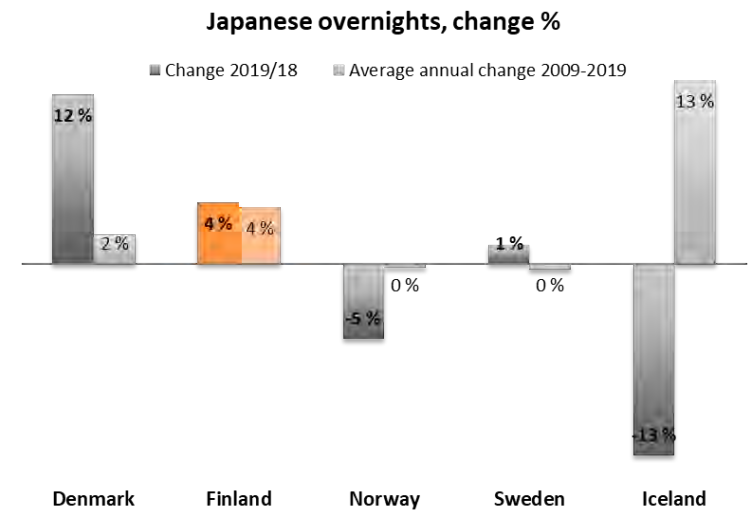
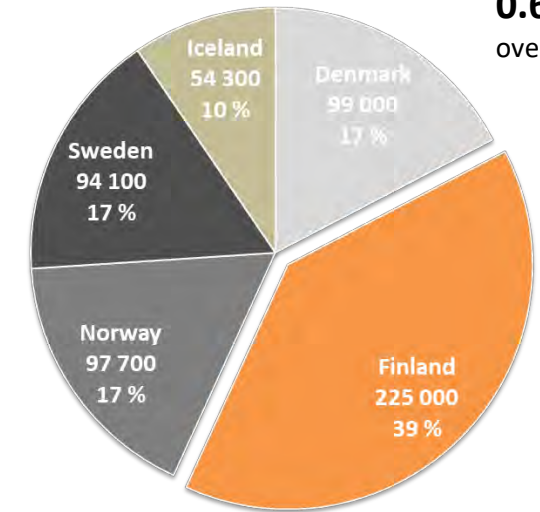
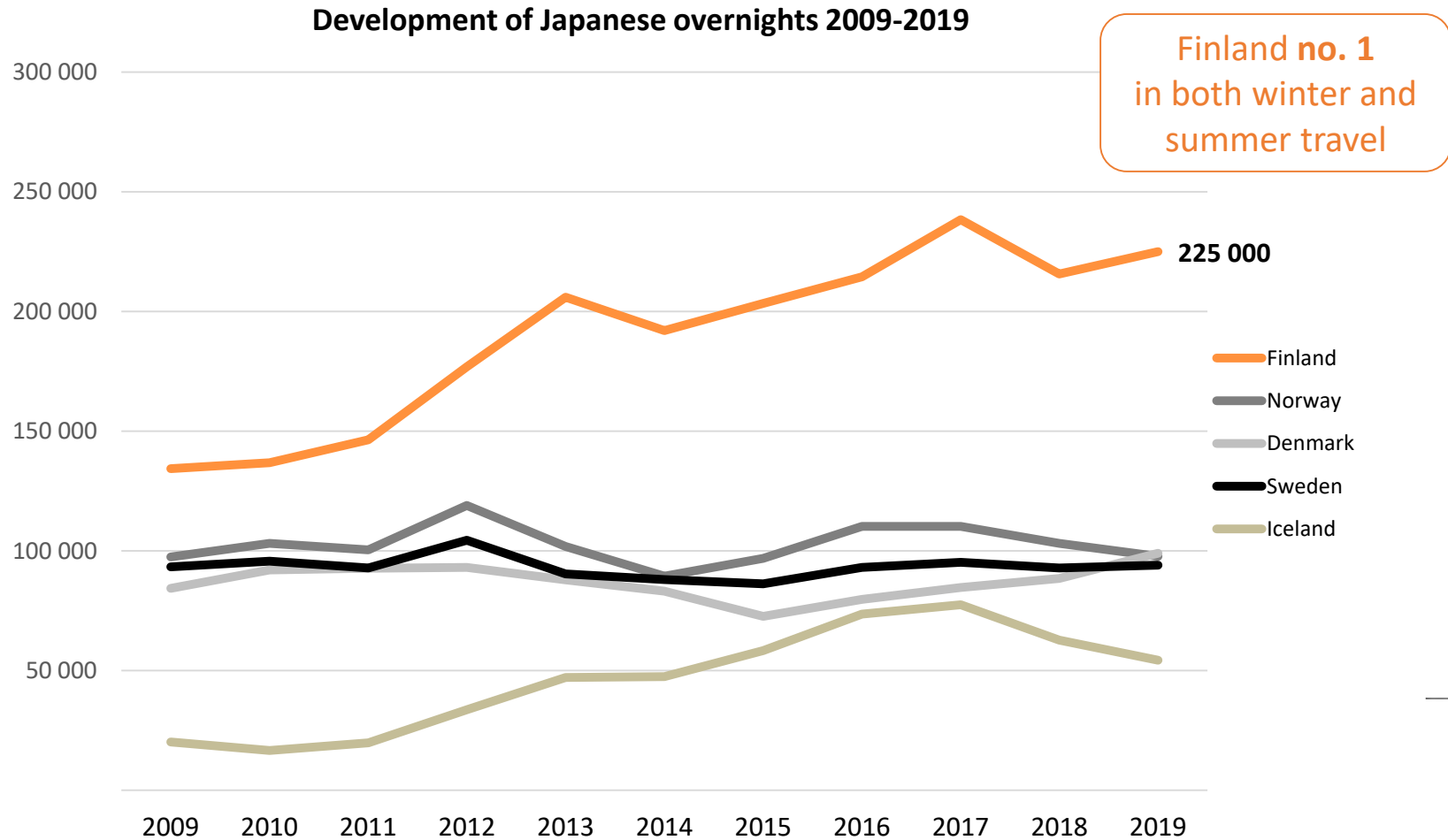
Statistics Sweden, Norway, Denmark and Iceland

Japan: Yearly overnights in the Nordic countries



Nordic countries' share of Japanese overnights 2019

0.6M
overnights in total



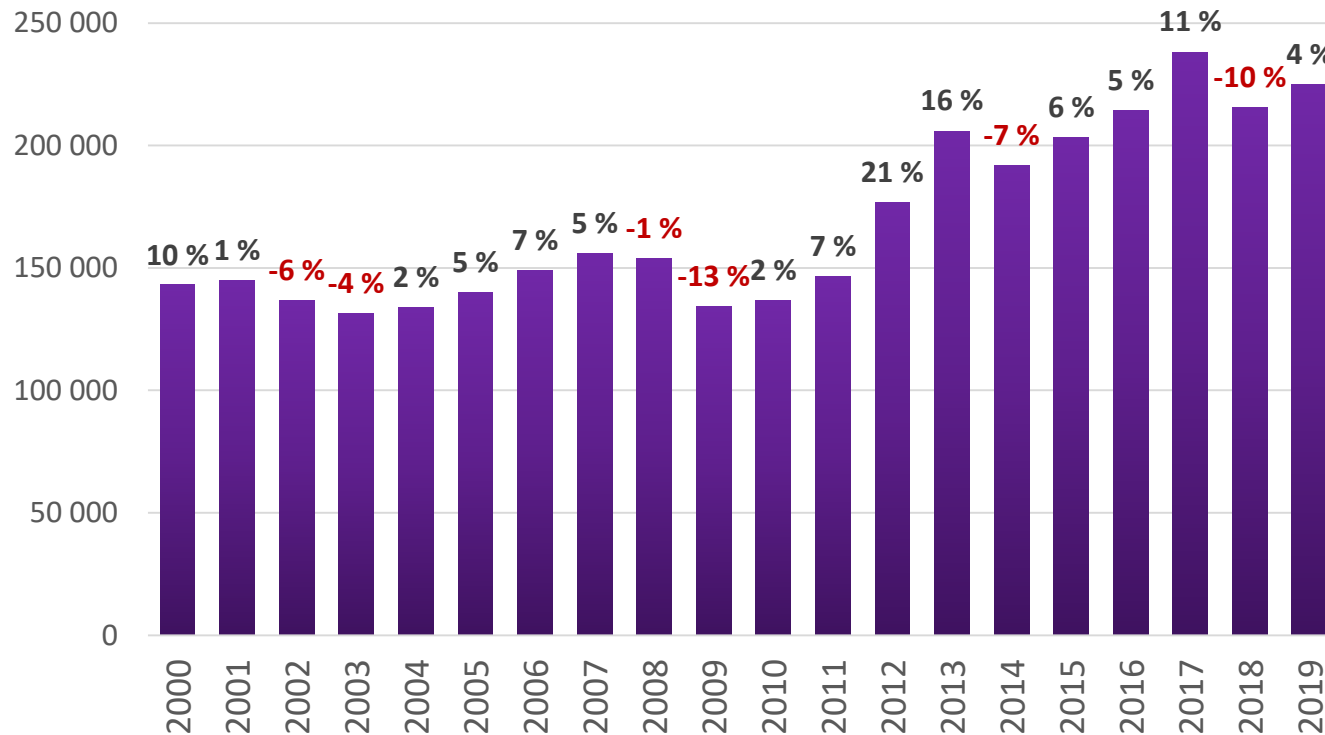
Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Denmark, Statistics Norway, Statistics Sweden and Statistics Iceland

Japanese overnights in 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

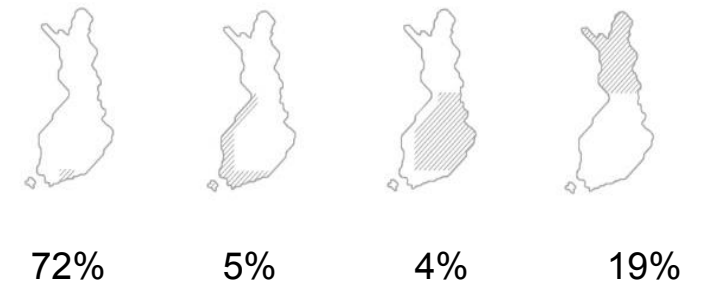
225 000 overnights in Finland

10th in country rankings
with **3% share** of foreign overnights

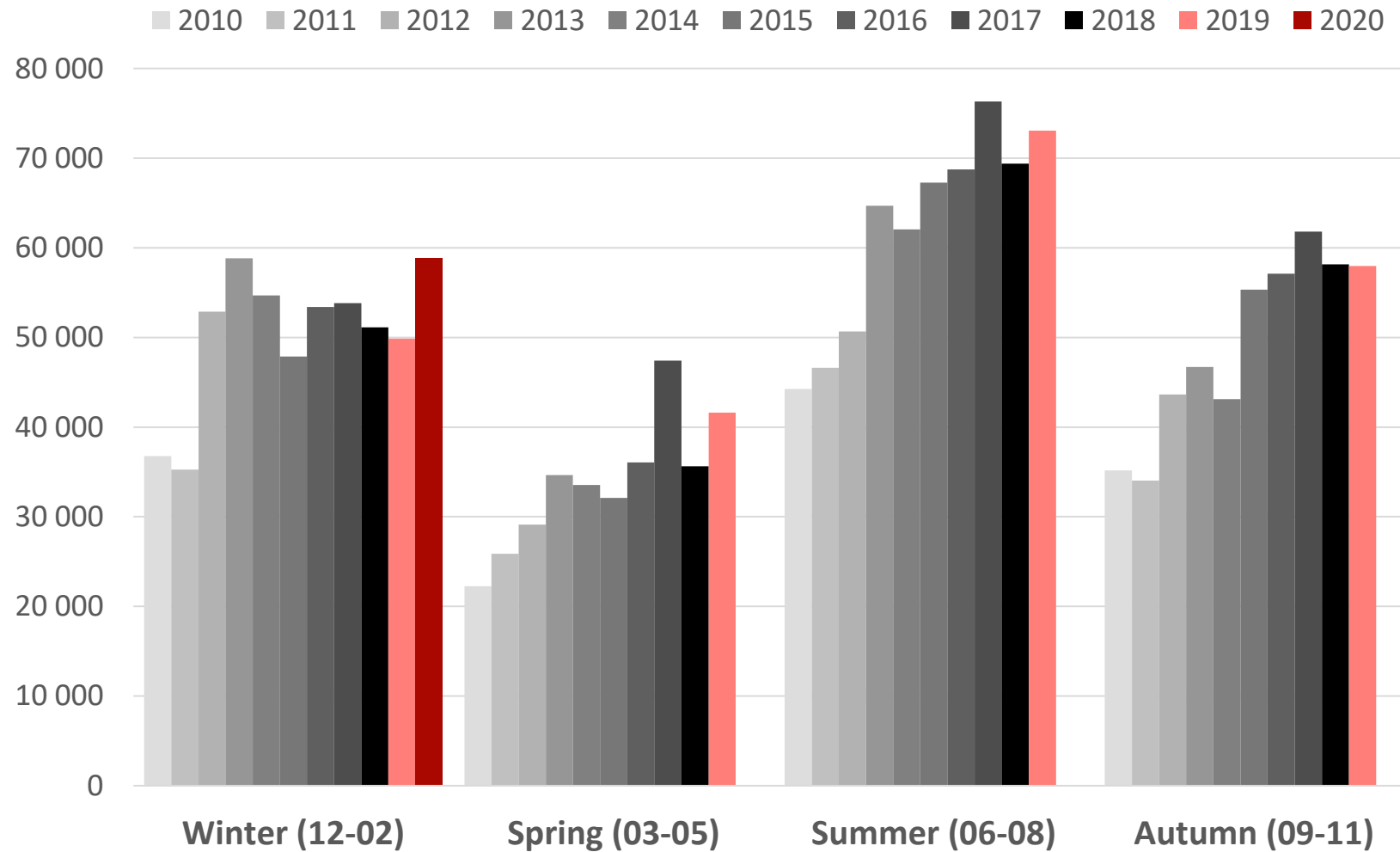
Average change 2000-2019: **+3%**

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

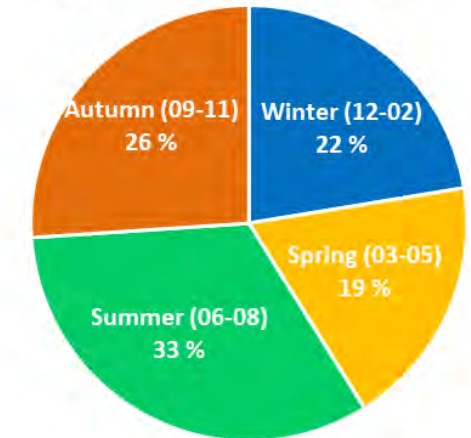
Share of overnights by regions 2019



Seasonality of Japanese overnights in Finland (pre-covid19)



Japanese overnights in 2019



Summary of VF surveys and statistics - Japan

- According to Visit Finland Brand tracking survey conducted in 2019, Finland stands out from its Nordic competitors and is ranked well ahead of the other Nordic markets in spontaneous consideration as a holiday destination.
- The northern lights, Santa and the Moomins, as well as the saunas and the nature, all come to mind with the Japanese when thinking about Finland.
- Travel-related **internet searches** of Finland **increased by 37%** in 2019 compared to the previous year, and **Japan is #1** in the searches among the target markets.
- Beside the general information, **saunas** and **northern lights** were clearly the most searched themes. Also **forests, food tourism** and **cafes** were popular in searches. The biggest increases in searches could be seen for **food tourism, saunas, natural wonders** and **northern lights**.
- Interest towards Finland started to increase strongly in the early 2010's, and **Finland stood out clearly from the other Nordic countries**. Even though travel to Iceland was also growing at the same time, it's volumes didn't reach the levels of the other Nordic countries either. Travel to Norway, Denmark and Sweden has remained quite stable during the latest years.
- **Japanese overnights in Finland** were quite evenly distributed among the different seasons in 2019, with a slight emphasis on summer. The biggest absolute increase in overnights has been in summer and autumn during the past ten years, but also other seasons have experienced a positive development.

Japanese Travel Habits

Euromonitor International Lifestyle Surveys, 2020



Japanese Travel Habits

- Consumers will be curtailing their outdoor leisure activities, including meeting up with friends, going to events and on trips and holidays in the medium term, **until they feel safe to socially connect again.**
- Around **15%** of consumers reported taking **1-3 international leisure trips a year** (pre-covid), and **only 3%** of the consumers were traveling more frequently abroad with **4+ leisure trips a year.**

Most important travel destination features

**Quality of
food & dining**
(34%)

Relaxation
(30%)

**Safe
destination**
(27%)

Most important travel destination activities

**Arts &
heritage**
(19%)

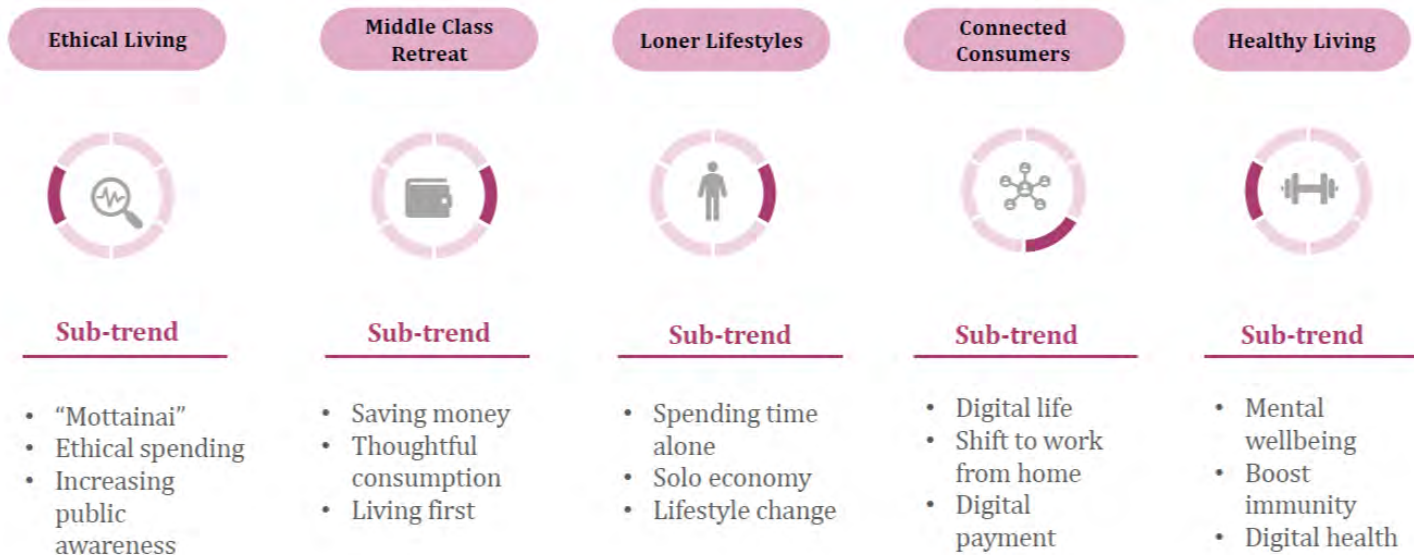
Shopping
(16%)

**Nature &
outdoor
activities**
(13%)

Japan – Consumer trends impacted by Covid-19

INTRODUCTION / EXECUTIVE SUMMARY / TREND OVERVIEW
MEGATRENDS AND SUBTRENDS IDENTIFIED FOR BUSINESS FINLAND

Japan - Megatrends and sub-trends impacted by COVID-19

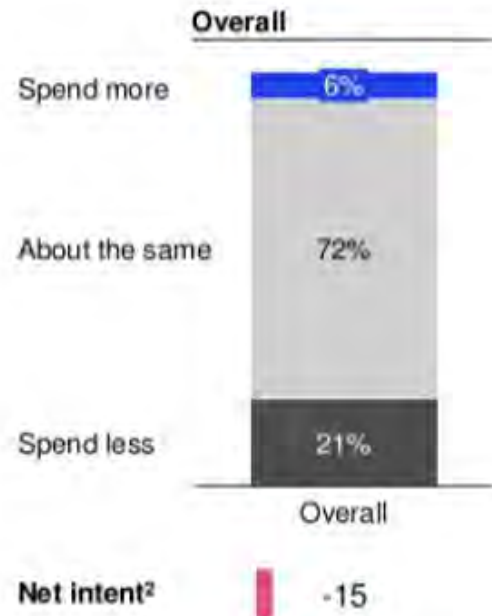


- Consumers are placing more importance on spending money on **something to share the same value and to show empathy with their vision and the message offered**, which gives them a sense of fulfilment.
- Consumers are becoming **more careful in their spending**, while they also seek small indulgences to enjoy at home and make their living more comfortable at least, and for relieving stress.
- **Solo economy** will continue to be a large consumer group in Japan. Since working from home is becoming more common due to COVID 19 people have **started to seek more comfortable environments for living and working**.
- The **move towards digitalisation** is accelerating in Japan.

Japan – Consumer sentiment during the pandemic

- While most Japanese consumers continue to feel mixed about the economy, **pessimism has decreased** from a high of **50 percent in early April** to **31 percent in September**.
- **Holiday spending** intent remains negative – 72% thinking of spending the same as before, 6% more and 21% less
- **Holiday shopping** moving more towards online

Holiday spending intent



New holiday outlook

Most consumers expect to shift to online for holiday shopping, a trend even present among Boomers

Holiday shopping channel preference¹
% of respondents



~93%
of Boomers plan to do as much or more of their holiday shopping online

¹ Q: How do you think the way you shop for the upcoming seasonal holidays (e.g., Singles Day, Black Friday, Christmas) may change compared with last year? Rated from 1 "shop significantly more in-store/in-person" to 5 "shop significantly more online." Figures may not sum to 100% because of rounding.

² Net intent is calculated by subtracting the % of respondents stating they expect to spend more in store from the % of respondents stating they expect to spend more online.

Source: McKinsey & Company COVID-19 Japan Consumer Pulse Survey 9/22-9/28/2020, n = 1,034, sampled and weighted to match Japan's general population 18+ years



Most popular Visit Finland website content during June-October 2020

Popular Visit Finland articles summer & autumn 2020

- Japan

Popular Articles on [visitfinland.com](https://www.visitfinland.com) during summer 2020:

- **21 reasons to love Finland**
- **Practical Information for Travelers to Finland during Corona Pandemic**
- **Land of the Midnight Sun**
- **Meet the Moomins**
- **Iconic Finnish Foods of All Time**
- **What are the Finns like?**
- **Say it in Finnish**
- **Finland's 'Ten Most Beautiful Landscapes'**
- **Meet Santa Claus**
- **Finland's wonderful wildlife**

Additionally during the Autumn 2020:

- **Metsä Pavilion**
- **On a Virtual Tour Around Finland**

During the summer months Japanese site visitors were interested in a variety of articles ranging from Midnight Sun and Moomins to Santa Claus. Japanese were also interested in Finnish Food, Landscapes and Wildlife.

During this autumn the interest has otherwise stayed very similar but Moomins and Santa Claus have increased in popularity and the article regarding the new Metsä Pavilion has quickly gained popularity.



MEET THE MOOMINS

Moomin is probably the most known and adored Finnish icon, if not before, then right after Santa Claus.

The white, hippo-like Moomins are Finnish literature characters created by the much-loved Swedish-speaking Finn, writer and artist Tove Jansson in the 1940's. After the initial success of the comic strips and books, Moomins grew into a world-wide phenomenon through puppet animations, theatre shows and Japanese-style cartoons.

Today the Moomins are part of the Finnish identity, inspiring generations over and over. The Finnish airline Finnair has chosen Moomins to represent their family-centred travel products and services. The world's only Moomin Museum can be found in Tampere and there are probably not many Finnish families that don't own at least one Moomin mug by the famous Finnish ceramics company Arabia.

Below we've listed some ways to experience the Moomins while in Finland. Be prepared – there are many!

METSÄ PAVILION

Business Finland, together with the Embassy of Finland in Tokyo and Finnish partner companies, has built Metsä Pavilion, a Home of Finland, in the heart of Tokyo on the grounds of Embassy of Finland starting from autumn 2020.

The Metsä Pavilion is a representative of Finnish wood architecture and Finnish design. Pavilion is a remarkable platform for Finnish culture and business, and it is the biggest export campaign to Japan in history. The carrying themes of the pavilion are nature, technology and sustainability. During Tokyo Olympic and Paralympic Games, now taking place in 2021, the pavilion turns into Home of Finland, National Partner House of the Olympic teams. Read more [here](#).

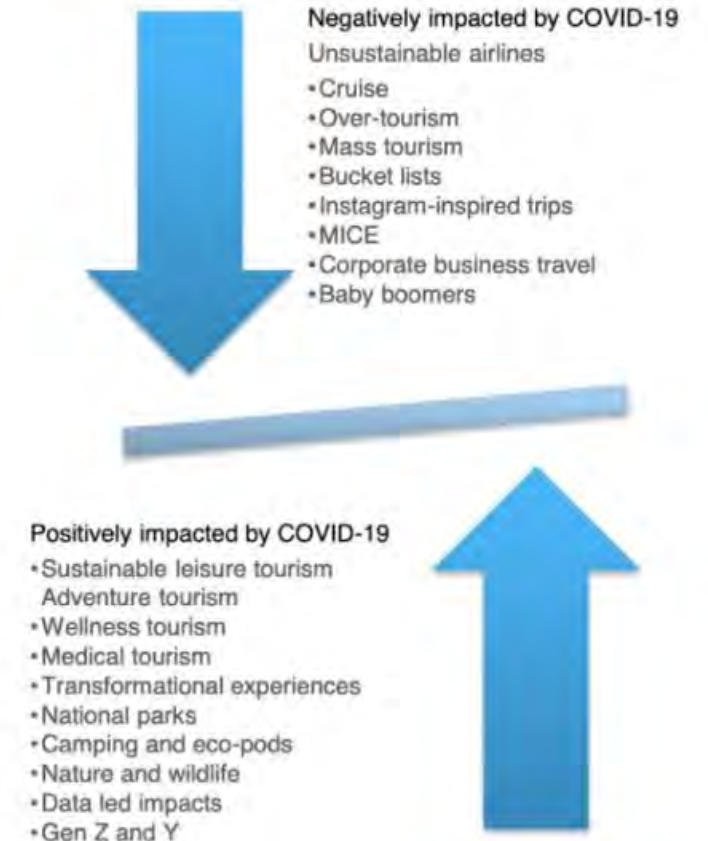




Global outlook for post-covid19 travel trends and traveller needs

New normal – first impacts on travel demand

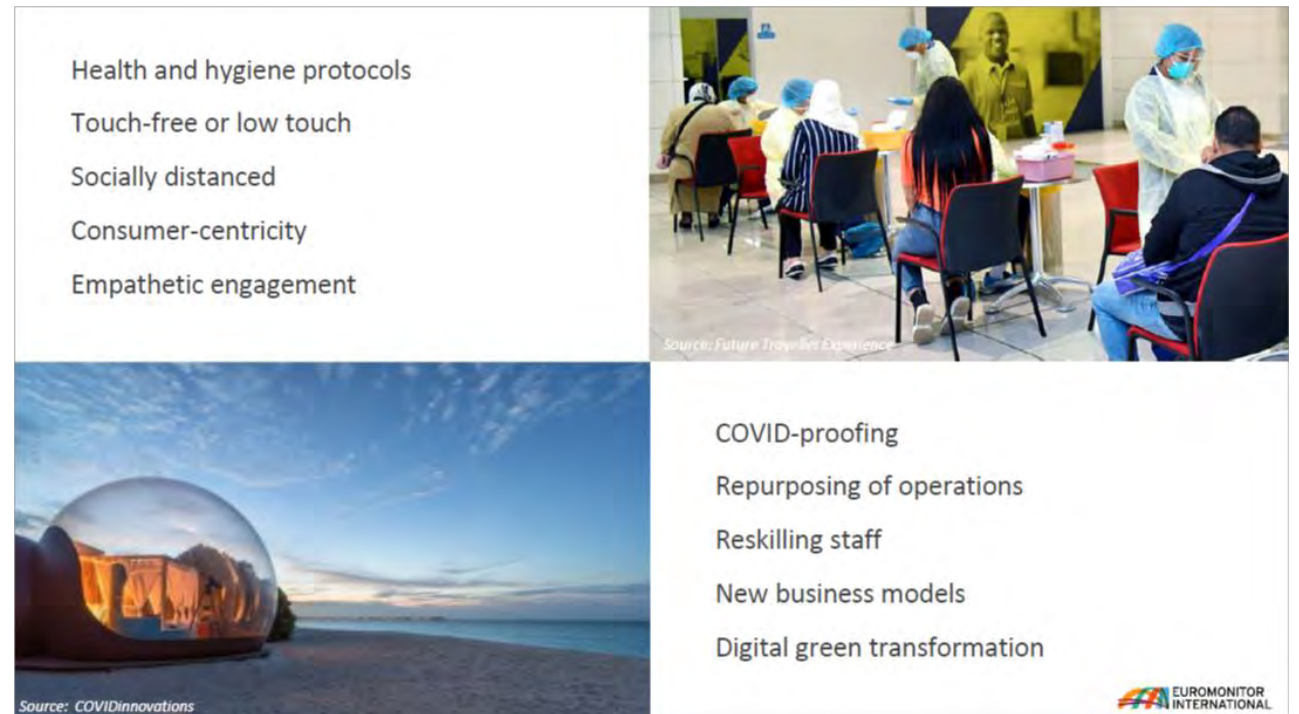
- Being immersed in nature and culture are likely to see a surge in interest as the tide turns on mass tourism and **“Off the beaten path”** destinations with wide open space become more popular
- After lockdowns and remote work, consumers are looking for **nature activities, wellness, luxury** as well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



Going towards the new normal

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

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



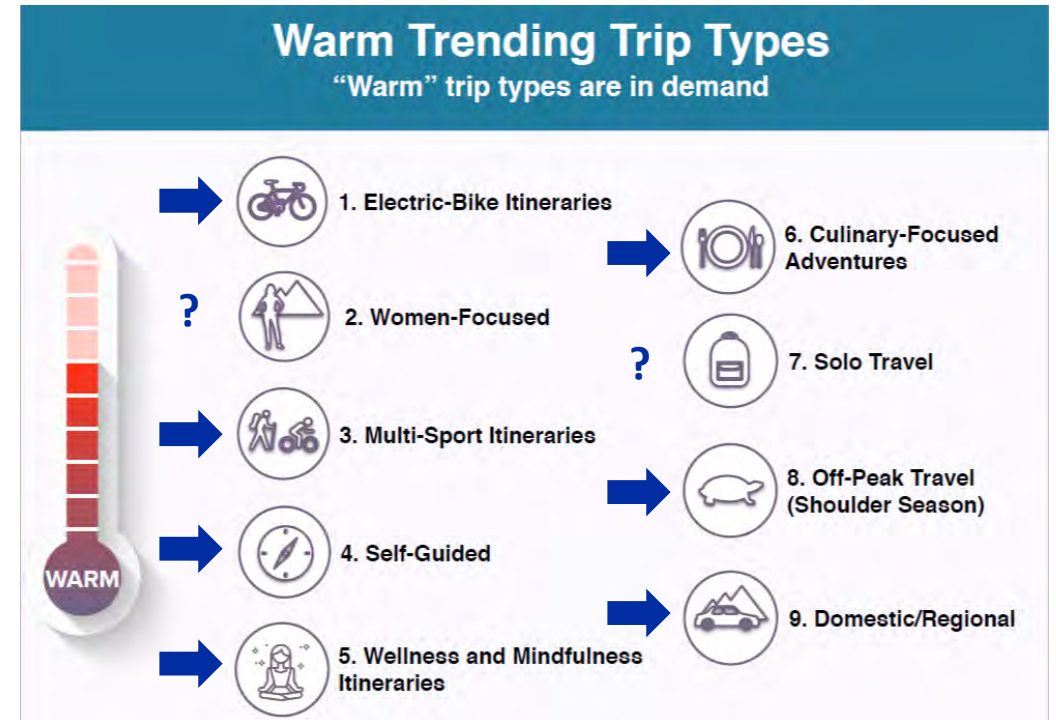
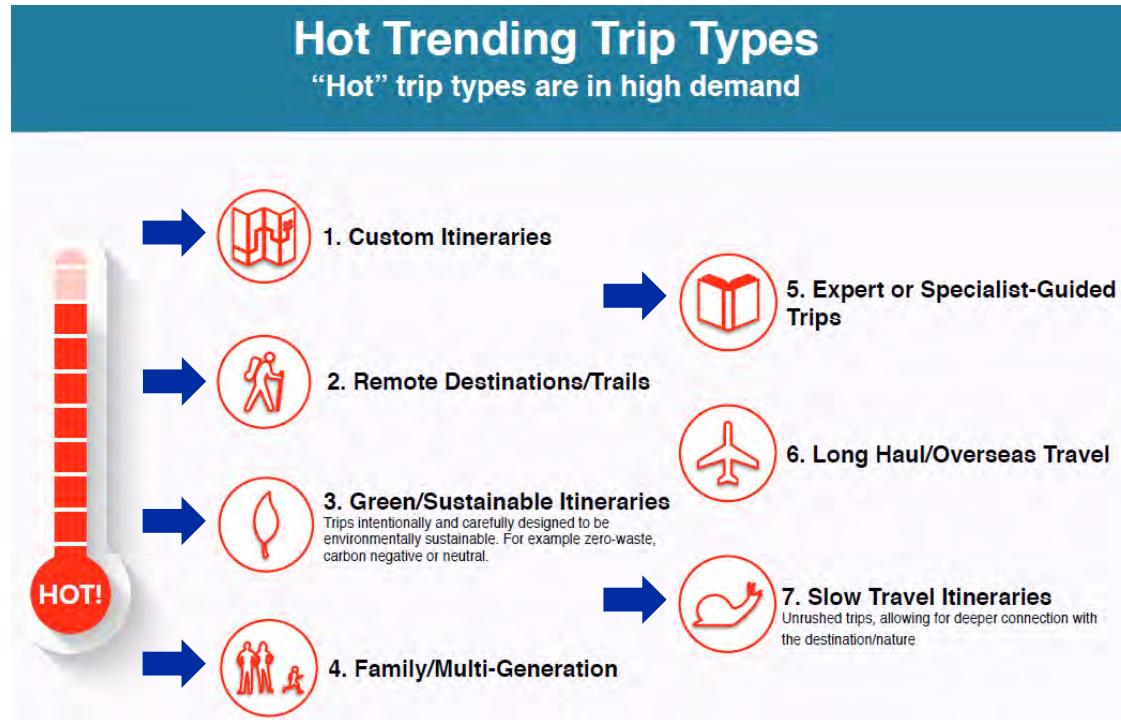
Traveller needs in the new normal

- **Customization** and **personalization** are key cornerstones of the trip
 - Travellers now place a higher premium on **problem solving and support**, especially for longer journeys
 - Travellers want more control over their travel, and **tailored travel experiences** win out over pre-packaged leisure travel options
 - Consumers are opting for **fewer holidays but with longer stays**
- Signs of leisure travel are slowly emerging in places where **natural parks, beaches** and **outdoor spaces** are safely accessible and supported by testing and tracing measures.
- Travellers are trying to find their way and make the most of what they can to fulfil their holiday needs – **traveller confidence** is the single most important element.



Trending trip types for nature-oriented travellers

- Most of the pre-covid trends in adventure travel are most likely to accelerate in the new normal
 - Sustainability and pure nature, tailor-made activities and services, wellbeing and transformational experiences in focus
- **Finland will have new opportunities with these trends accelerating and the nature travel segments growing**

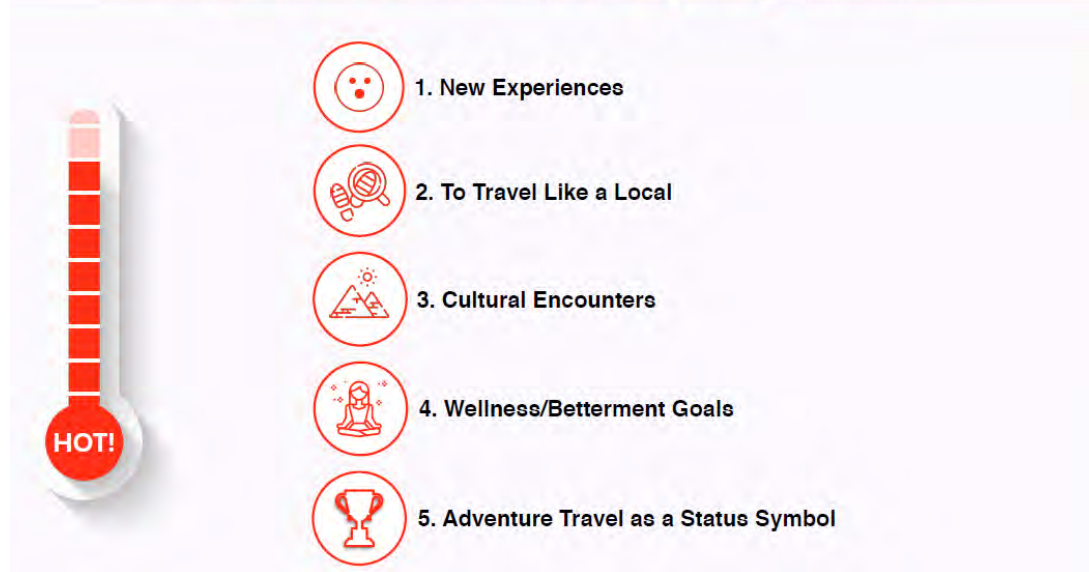


Travel motivations for nature-oriented travellers

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

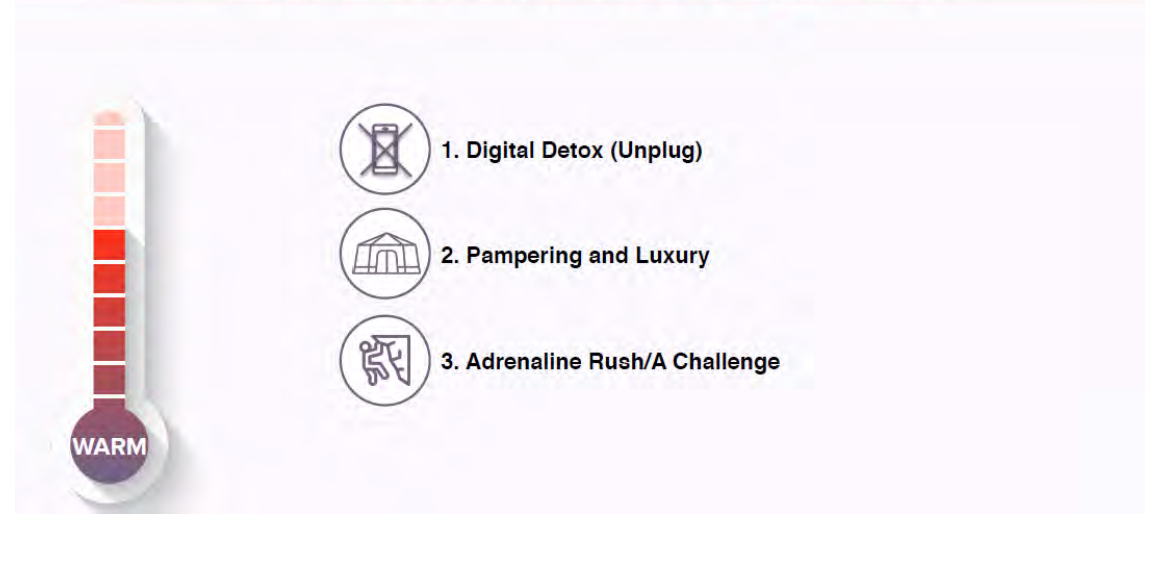
Hot Trending Consumer Motivations for Adventure Travel in 2019

“Hot” indicates these factors are very strong motivators



Warm Trending Consumer Motivations for Adventure Travel in 2019

“Warm” indicates these factors are strong motivators



Entering the “next normal”

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

 **Great new opportunities also for Finland!**





Visit Finland