Japan
Travel insights
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**

Finland clearly on top of mind among the Nordic countries.

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.

Norway, Denmark & Iceland rank 26th, 37th and 39th respectively.

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.
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.

Source: D2 Digital Demand
Evolution of searches of the Japanese target market

+28.2% Growth

+21.3% Growth

+37.3% Growth
Life Money says that there is no water bath in Sauna's home country "Finland"

Posted on: Aug 11, 2019 16:00

The boom is sparked by manga artist Katsuki Tanaka.

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

2019/08/12 TABI LABO editorial department

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

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"! ?

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

Northern Lights

growth = +66.0%

Saunas

growth = +91.4%
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

Development of Japanese overnights 2009-2019

Finland no. 1 in both winter and summer travel

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
- 72%
- 5%
- 4%
- 19%

Source: Visit Finland Statistics Service Rudolf, Statistics Finland
Seasonality of Japanese overnights in Finland (pre-covid19)

Source: Visit Finland Statistics Service Rudolf, Statistics Finland
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

- 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%)

Source: Euromonitor International Lifestyle Surveys, 2020
Japan – Consumer 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.

Source: Euromonitor International - Update on consumer trends and lifestyles in Japan in light of the pandemic
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**

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

Most popular Visit Finland website content during June-October 2020
Popular Articles on 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?

Source: THE IMPACT OF CORONAVIRUS ON TRAVEL AND TOURISM, Euromonitor May 2020
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

Source: ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
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

Source: ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
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