



VF France Market Report
November 2019

Visit Finland Country Representative

Sara Kaur Sodhi



Semiannual Report – INDIA

Summer season 2019 and outlook for winter 2019-20

CONTENTS

- Factors affecting the results of the summer season 2019
- Outlook for the winter season 2019-20
- Prospects for the summer season 2020
- Prospects for the autumn/winter season 2020
- Theme check: food tourism
- Trends and other relevant travel related topics
- Facts and figures - Market review data

Factors affecting the results of the summer season 2019

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

- June- August 2019 +17% increase in Indian overnights to Finland (maximum growth in Helsinki Region).
- During summer the Scandinavian Capitals Package/ Nordic Capitals Package is the top selling package from India.
- New group departures are launched every year for Scandinavian capitals
- Several packages were also launched for Midnight Sun including Helsinki & Rovaniemi
- There has also been a steady increase in FIT travel to Finland wherein the duration of stay in Finland is higher than groups
- MICE Segment has grown very well for Finland and there were several MICE groups to Finland in combination with other Scandinavian Capitals
- Summer is the peak travel season from India
- Scandinavia is now one of the preferred destination for the evolved Indian Traveller
- The volume of FIT and customized small groups segment is rising
- Growth in education travel from India to Finland
- Active B2B sales promotion has supported the growth.
- Visit Finland's media trips and PR activities have also helped to get more visibility and supported the steady growth.

Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

Changes in demand

- Finland is gaining popularity with Indians as a mono travel destination which contributed to increase in the overnights in Finland.
- Scandinavia as a region is becoming more popular with the Indian HNI segment for summer holidays. The packages also include 1-2 Nights in Helsinki
- Groups going to Finland from India are also doing combinations like Finland +1 Country (Sweden/Estonia/Russia/Iceland)
- Single Women groups travelling to Finland
- Increase in education travel from India to Finland

Finland's image as a travel destination

- All the B2B & PR Initiatives have created more brand awareness for Finland
- Happiest country with the cleanest air and water
- One of the best education systems in the world
- Unspoilt Nature
- Hometown of Santa Claus

Changes in distribution

- B2B Initiatives have resulted in the availability of More Packages for Finland with TO's
- Agents are getting hands on experience of Finland in Fam Trips which has enabled them to do tailor made packages for
- Multiple Finland packages available on all the OTA Channels directly accessible by Consumers



Factors affecting the results of the summer season 2019

Reasons for the increase/decrease in travelling to Finland?

Products that have been attractive

- Nordic Countries Groups (Including Helsinki)
- Scandinavian Capitals Packages (Including Helsinki)
- Midnight Sun Packages (Including Helsinki & Lapland region)

Regions that have been attractive

- Helsinki +22% Growth in summer overnights
- Lapland +18%
- Coast & Archipelago +7%

Campaigns, joint promotions results

- VF India Road Show in Feb 2019 encouraged agents to promote Finland
- VF India Road Show bridged the gap between Indian buyers & Finnish Suppliers
- Active B2B Promotions resulted in new and additional packages for Finland
- Midnight Sun Workshop was the first showcase of Finnish Summer for Indian Agents which created a lot buzz about Finland as a summer destination
- Summer Press Trip also generated extensive press coverage on summer in Finland

Outlook for the coming winter season 2019-20

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

Increase

- Finland is gaining popularity with Indians as a winter destination
- Indian Children are aspiring to visit Finland and meet Santa Claus. Children in India are key drivers for family holidays.
- The movie "WAR" did extremely well in Indian box office and created good awareness about Finland
- Several new agents PAN India are focusing on products for Finnish Lapland (both FIT & GIT) and several new group departures have been launched in India for Lapland in winter 2019-2020 (Urvi Tours, Backpacker Co, SOTC, Thomas Cook, Kesari, Veena World, Flamingo, Lumi Safaris, When in City etc)
- HNI FIT Travel to Lapland is also on rise – Northern Lights as must do with the Indian HNI Segment now
- VF B2B Activities have made Indian agents more confident on selling Finnish Lapland
- Finland is gaining popularity with Corporates and several MICE Groups have been confirmed for Lapland

New winter products

- Several New combinations for Lapland are being launched with Saariselkä, Rovaniemi, Kemi, Levi & Ranua for both FIT & GIT etc.
- Groups packages with Indian & Jain Meals in Lapland are also being launched

New sales channels

- TOs for tailor-made packages & Groups
- Educational TOs
- MICE travel agencies –
- OTA's



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?

- Exclusive Mono Finland Winter Packages
- Northern Lights Holidays with stay in experiential accommodations (Igloos)
- Visiting Santa Claus Village & Christmas Markets
- Adventure Holidays in Lapland (Husky & Reindeer Safari, Snowmobiling, Ice breaker with Arctic Floating)
- Skiing Holidays

Which are the traveller segments?

- Group travelers (GIT)
- FIT's
- MICE (Top Management , Incentive Programs, Young Entrepreneur Organisations)
- Principals /Students Groups (educational travel)
- Small private groups with customized itineraries
- Families with children
- Young Backpackers

Outlook for the summer season 2020

Ad hoc marketing opportunities

TO cooperation, joint promotions, crossover, events, PR, social media

- VF India Roadshow 2020 in New Delhi & Mumbai
- B2B2C - Joint marketing campaigns with agents to promote summer packages of Finland (Helsinki, Lakeland & Lapland)
- B2C Promotion to create awareness about summer experiences in Finland
- Summer Press Trip to showcase unique experiences in Helsinki & Lakeland/ Archipelago etc.
- Luxury Summer Fam Trip for top TO's for customised packages (Helsinki & Lakeland/ Archipelago)
- Influencer Trip to showcase Finnish Summer (Helsinki & Lakeland/ Archipelago)
- Summer MICE Fam to showcase Finland as a Mono MICE Destination (Helsinki & Lakeland)
- Visit Finland is also planning a Go Nordic Culinary Week – Finland Edition to showcase Finnish Cuisine in India

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?

- Customisation as per the requirements of India market
- Experience based travel
- Local Food & Experiences
- Off peak travel is gaining popularity with Indians

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

- Group travelers (GIT)
- FIT's
- MICE
- Principals /Students Groups (educational travel)
- Small private groups with customized itineraries
- Families with children

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

- Bleisure
- Youth – Urban Indians, millennials (Adventure Travel)
- Only female travel
- Celebration Travel (Landmark occasions, Bachelor Trips)
- Weddings
- Luxury Traveller

Theme check: Food tourism

What kind of demand or potential you find in the market you represent?

1. What is "in" on your market in food tourism? Is food important for travelers on your market?

Local Food & Beverage experiences are trending in India market. Food is extremely important for Indian travellers as they love to indulge in local & global food & beverage experiences. They also require local Indian cuisine for comfort.

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

Some luxury tour operators do offer some food themed tours with food & wine trails. India also has an extensive community of Food Bloggers which can be targeted.

3. 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.?*

- Foraging
- Beverage tours/tastings
- Food Routes/Restaurant Hopping tours
- Picnic in the forest or by campfire
- Cooking classes
- Home dining

4. The best benchmark and examples (destinations or products)?

- France & Italy offer several food & wine tours in India.

Trends and other relevant travel related topics

Trends

- **TRAVELLERS GO BIG ON BLEISURE TRAVEL**

While millennials are emphasising on work-life balance, more and more Indian business travellers are combining leisure with their business trips. They are doing this by bringing their family along or extending business trips over the weekend.

- **EVERY TRAVELLER IS AN INFLUENCER**

Ever-increasing connectivity is proving to be highly beneficial for the travel sector. By staying active on the internet and social media all the time, Indian travellers not only have a more enjoyable experience, but they also share more of their trip with friends and family while acting as influencers.

- **GENERATIONS TRAVEL TOGETHER**

Indian Grandparents, parents, and young children alike are increasingly planning once-in-a-lifetime trips to exotic places that offer fun and adventure for all ages. Small-time travel curators or planners play a major role here by helping the families customise a trip that accommodates several generations.

- **INSTAGRAM-WORTHY TRAVEL EXPERIENCES**

Who doesn't take 'braggies'- selfies that brag about the traveller's exotic holiday surroundings? And what are typical 'braggies' made of? Your picture with the view from the hotel window, you on the cuddly bed or posing amid the beautiful surrounding landscape.

Trends and other relevant travel related topics

New distribution channels

Your suggestion on how to develop business with them: what needs to be done?

- India centric Customised packages for Finland for all regions and all seasons to be readily available with DMC's
- Fam Trips
- Theme focused ideas/itineraries like Design Tours, Food tours, Adventure Tours
- MICE specific packages

Online channels

Channels where Visit Finland should be present and suggestion of how to be present

- India Specific Handles for Visit Finland on Instagram & Facebook
- OTA Channels like Expedia, Make My Trip, Yatra Trip Advisor, Tripoto etc

Trends and other relevant travel related topics

Competitors' actions

- Iceland hosted the first edition of Go Nordic Culinary Week in India in November 2019
- Iceland appoints VFS Global for offering visa services in India across 3 locations
- Scandinavia Tourism Board conducted their Road Show in New Delhi, Mumbai & Chennai in November 2019
- Brand USA to use 'America's Musical Journey' to lure travellers beyond the gateway cities
- Indians no longer require visas to visit Brazil
- Uzbekistan to introduce attractive incentive scheme for film tourism in 2020
- Tourism Australia unveils campaign to drive visitations from India for ICC T20 World Cups 2020
- Visit California to highlight & promote 'self-drive trips' in Indian market
- Tourism Malaysia unveils 'VisitMalaysia 2020' campaign in India

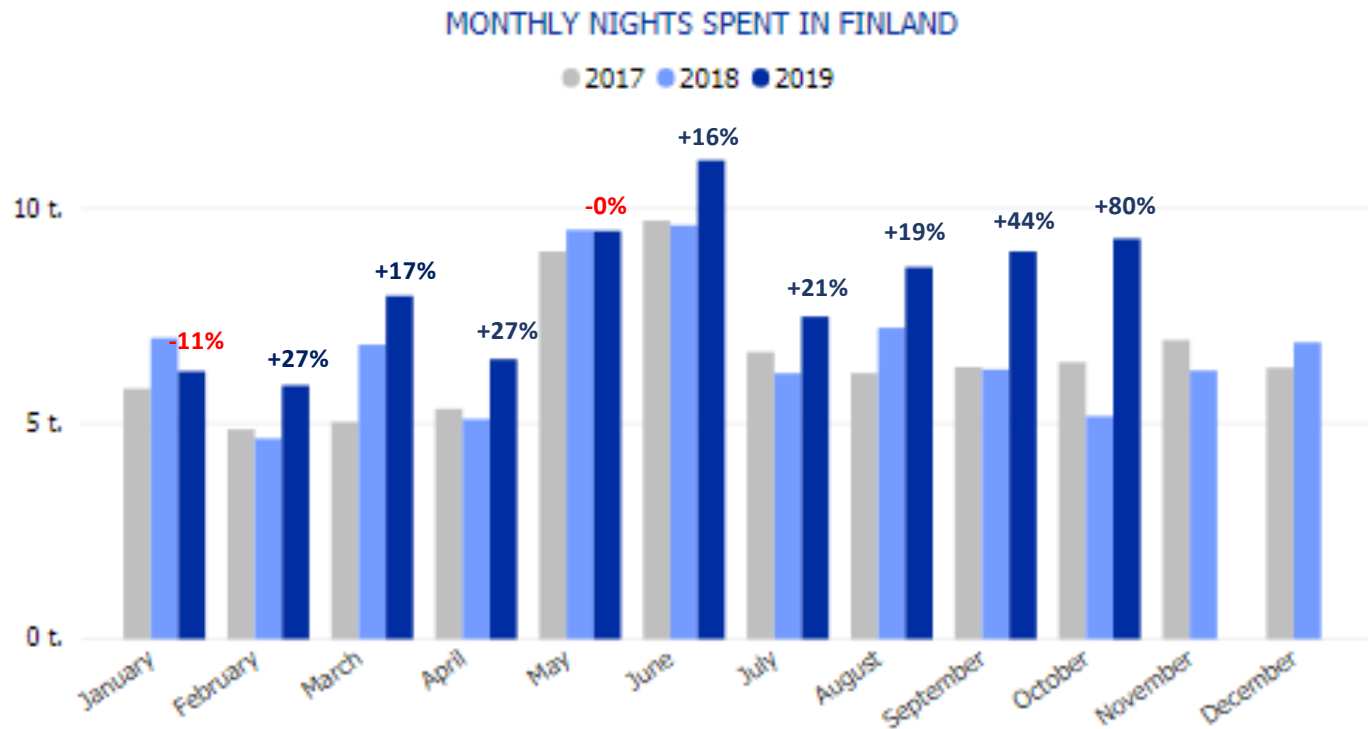
Trends and other relevant travel related topics

Free word

- All the destinations around the world are targeting India market, and are very active with marketing campaigns with big budgets.
- For Finland to stand out a lot of targeted PR and media activities as well as btob and btobtoc activities with travel trade are required.
- Customisation is key for India market and Finnish DMC's in order to tap this market have to increase their focus on FIT travel along with Group Travel.
- In order to cater to Indian Food Requirements tie up with local Indian Restaurants to be able to cater this requirement specially for Groups & MICE .
- In order to grow business for Summer, DMC's should launch various combination itineraries for summer in Finland. These itineraries should be ready made & easily accessible to agents in order to push the same.

India – Market Review

Indian overnights in Finland



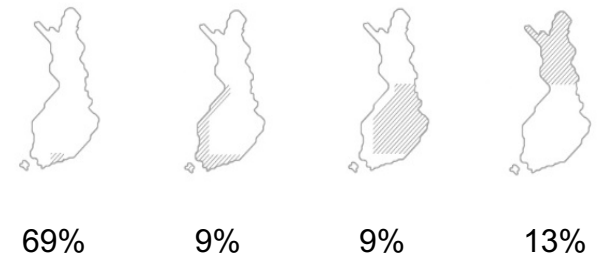
Year 2018

19th in country rankings
with a **1.3% share** of foreign overnights

Average change 2000-2018: **+13%**

Change 2018 compared to 2000: **+320%**

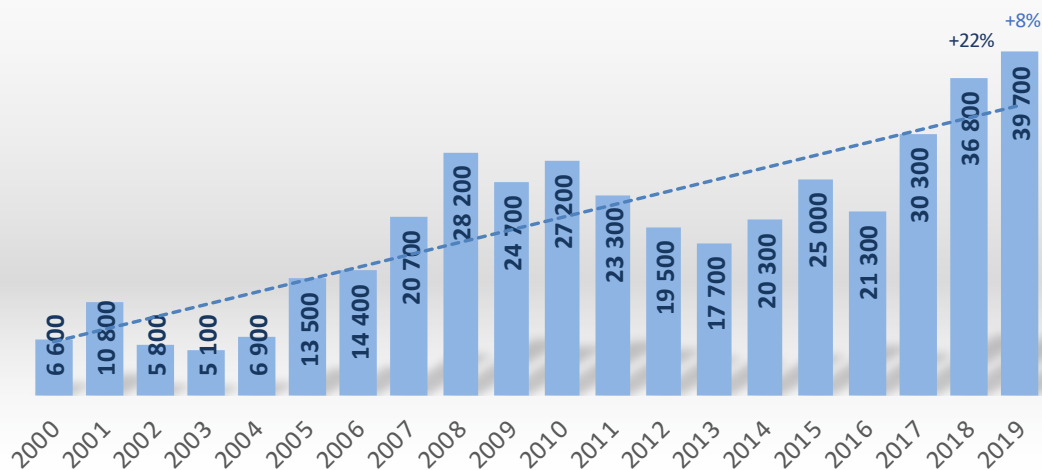
Share of overnights by regions 2018



Indian overnights in Finland

Winter and Summer 2019

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

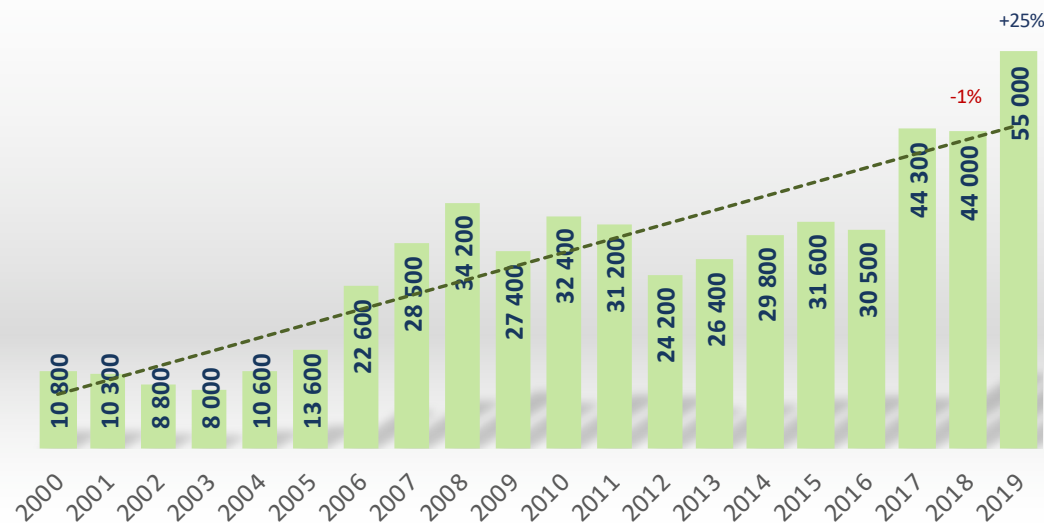


Winter 2019: **20th** in country rankings with a **1%** share of foreign overnights

Average change 2000-2019: **+15%**

Change 2019 compared to 2000: **+497%**

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



Summer 2019: **20th** in country rankings with a **1.6%** share of foreign overnights

Average change 2000-2019: **+13%**

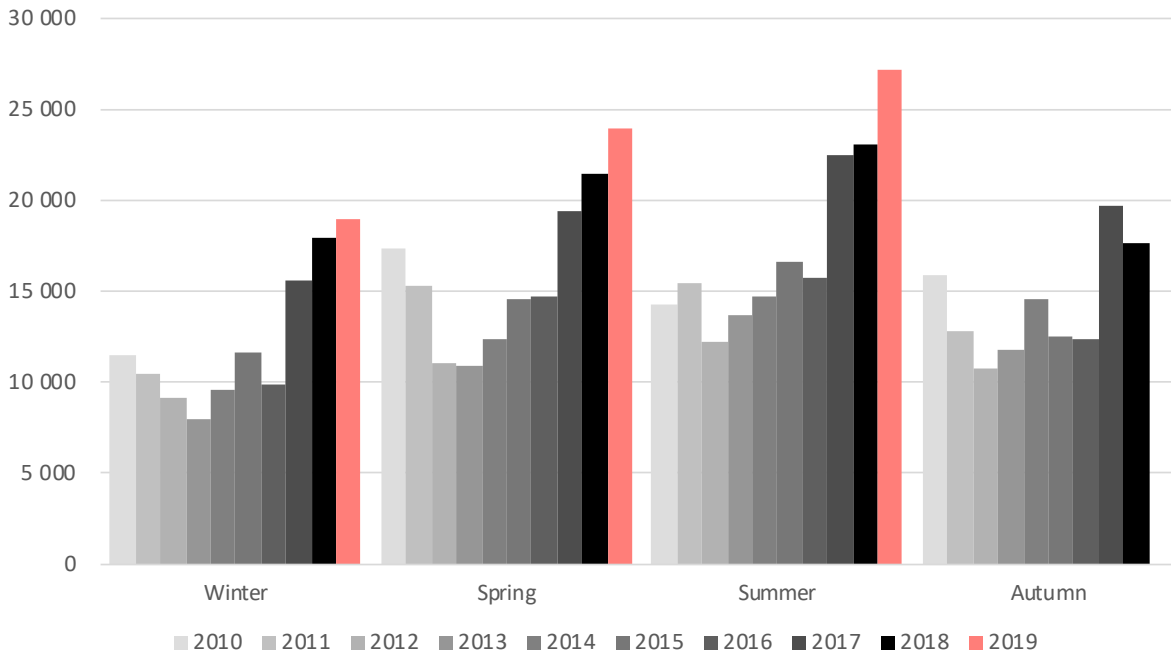
Change 2019 compared to 2000: **+407%**



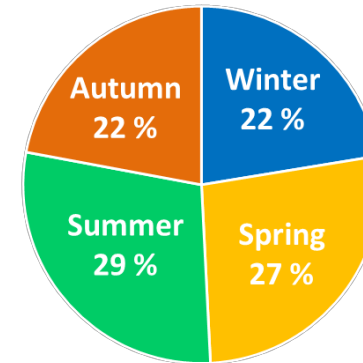
Trends for seasonal overnights in Finland Indian visitors

All seasons are popular travel seasons among Indians. The trends in overnights in all seasons are increasing.

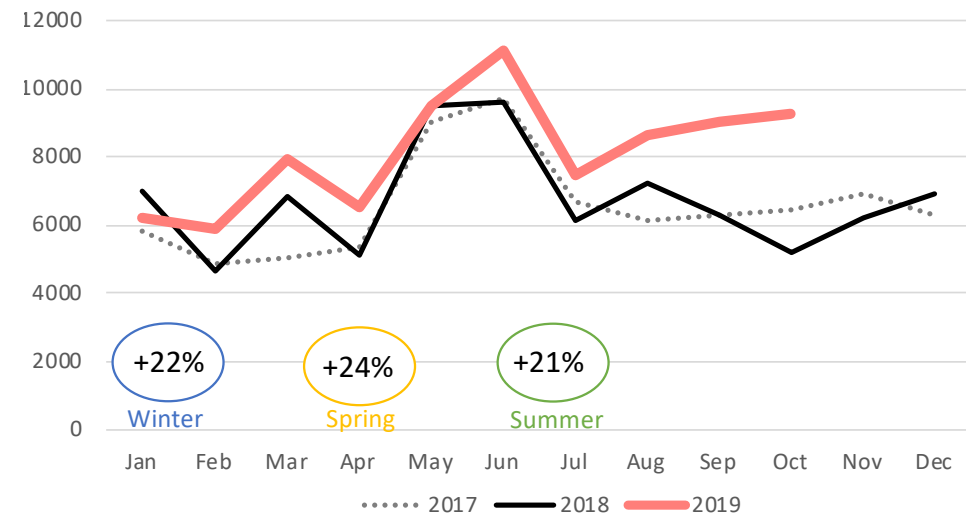
Indian overnights by season



WHOLE FINLAND 2018



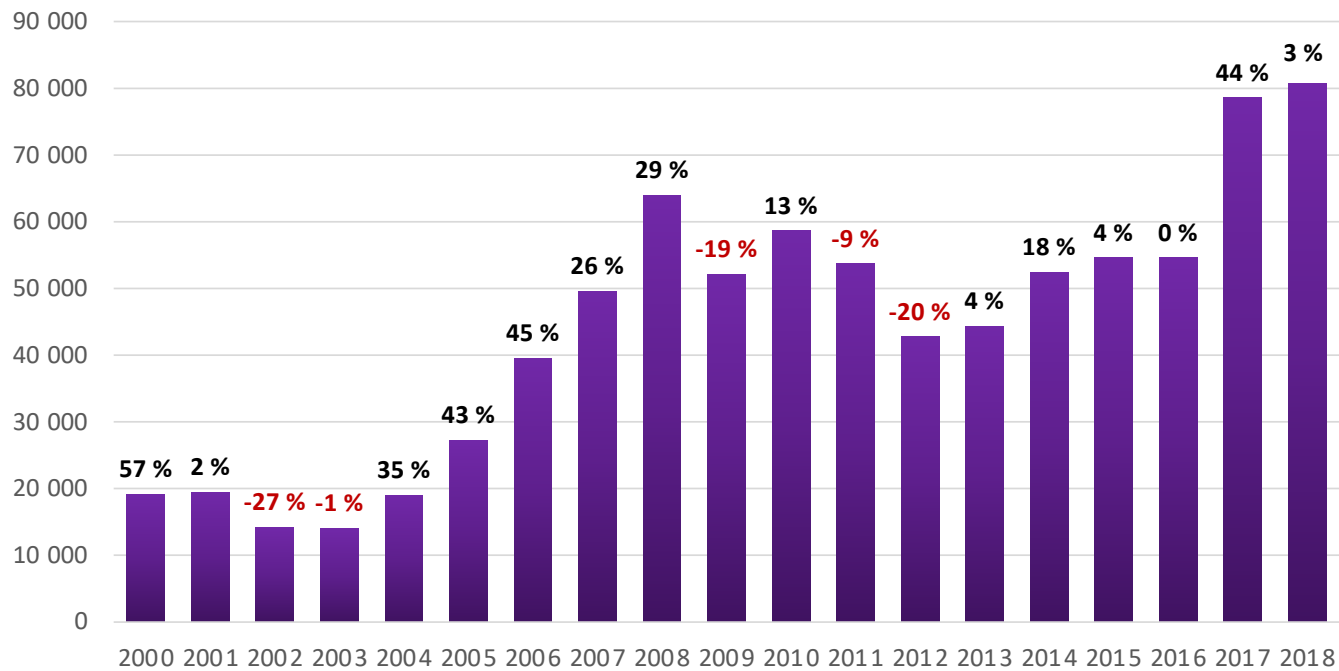
Indian overnights by month 2017-2019



Source: Visit Finland Statistics Service Rudolf, Statistics Finland



Indian overnights in Finland



Year 2018
19th in country rankings
with a **1%** share of foreign overnights

Average change 2000-2018: **+13%**

Change 2018 compared to 2000: **+320%**

Share of overnights by regions 2018

