



Visit Finland

German & Dutch Market Insights

Market development, outlook, 2022 Visit Finland activities

2023 market strategy, B2B and B2C activities

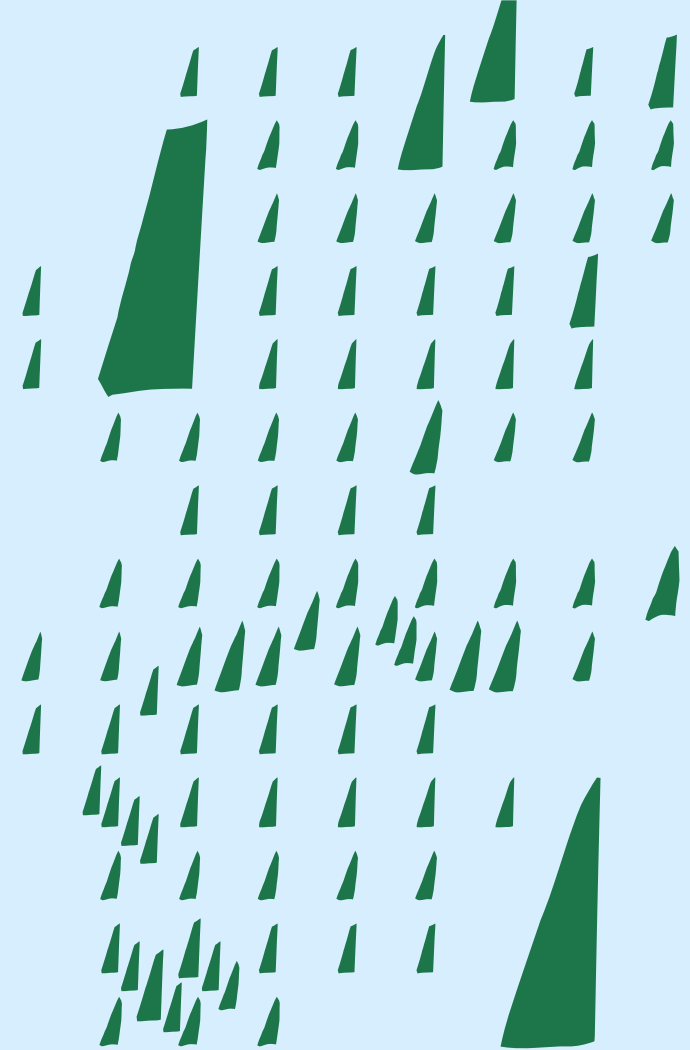
Hanna Viitasaari, Jyrki Oksanen, Eevakaisa Mölsä 6.10.2022

Agenda

- **Saksan ja Hollannin markkinatilanne, Hanna Viitasaari**
- **2022 toimenpiteet, markkinan tunnelmat**
Markkinastrategia, toimenpiteet, kampanjat, Jyrki Oksanen
- **Mediatyö Saksassa, Eevakaisa Mölsä**

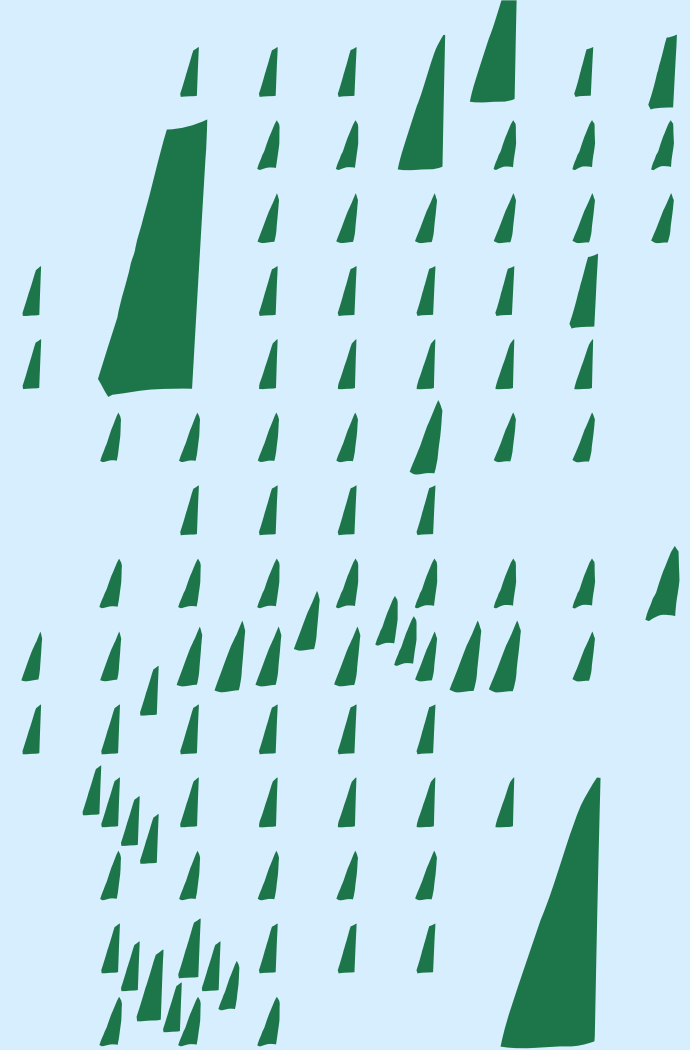
Chat: Suvi Pribilla ja Sara Snäll

Tekniikka: Aleksandra Shakhnovich

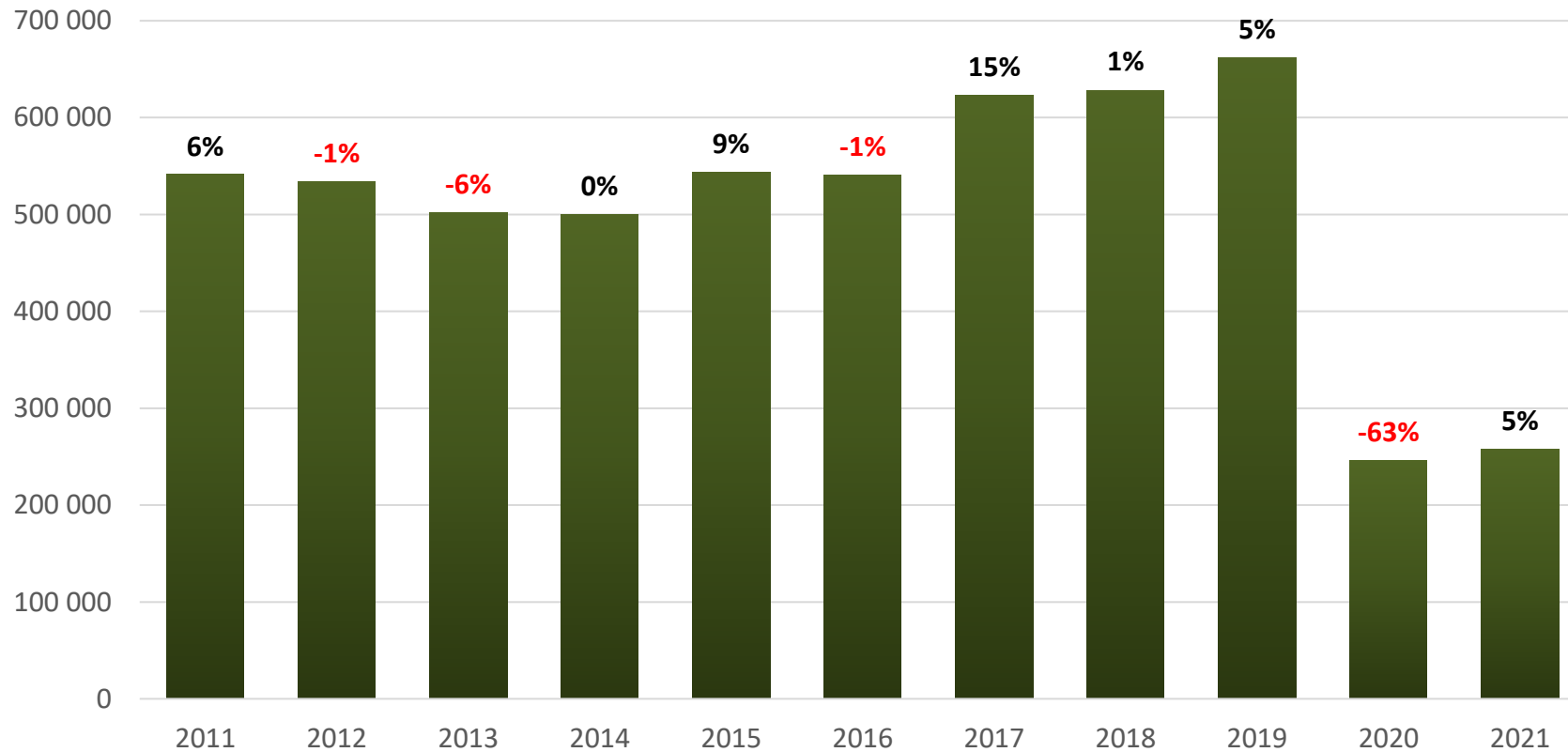


Germany insights

- **Overnights Finland and Nordics**
- **Digital Demand – Travel Related Internet Searches**
- **Forward Keys – Flight bookings and Capacity data**
- **Oxford Economics – Recovery Forecast**



Germany – overnights in Finland 2011-2021



2021
258,000 nights
YoY change +5%

2019
662,000 nights
2021 vs. 2019 -61%

Germany – Cumulative overnights in 2022

Nationality	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
Germany	81,420	55 ▲	432,775	228 ▲
Sweden	72,744	133 ▲	340,215	290 ▲
France	22,904	94 ▲	239,838	771 ▲
United Kingdom	27,699	251 ▲	206,335	741 ▲
Netherlands	19,874	66 ▲	198,193	541 ▲
United States	34,569	204 ▲	172,988	308 ▲
Estonia	23,524	17 ▲	129,568	48 ▲
Switzerland	15,026	40 ▲	114,515	373 ▲
Norway	18,451	222 ▲	110,406	427 ▲
Italy	22,307	105 ▲	101,923	288 ▲
Spain	20,839	127 ▲	89,598	286 ▲
Russia	38,680	857 ▲	82,192	368 ▲
Belgium	7,291	80 ▲	80,044	687 ▲
Denmark	9,469	58 ▲	70,981	272 ▲
Poland	12,853	95 ▲	70,828	137 ▲
Austria	7,387	48 ▲	47,503	266 ▲
Israel	5,095	105 ▲	44,360	915 ▲
Latvia	6,980	105 ▲	40,020	232 ▲
Czech Republic	4,602	91 ▲	30,965	267 ▲
Lithuania	5,925	111 ▲	30,417	171 ▲
Ukraine	5,751	63 ▲	29,200	166 ▲

- There are already over **430 000** German overnights so far this year and the busiest month has been August with over **81 000** nights
- Germany is by far the biggest source market in Finland

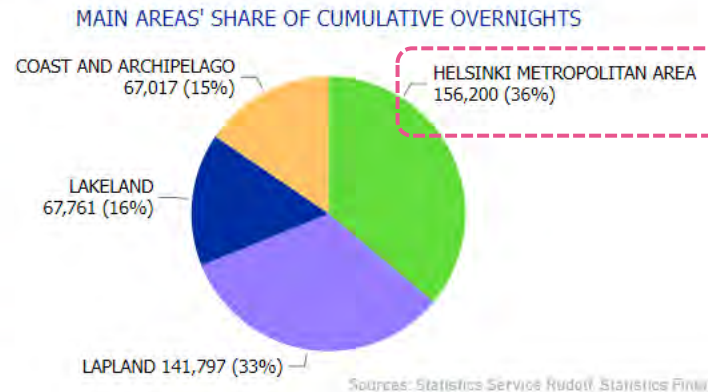
Germany – Cumulative overnights in 2022

August
2022

4. OVERNIGHTS IN REGIONS BY TARGET MARKETS

VISIT
FINLAND

Target market	Region	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
Germany	Uusimaa 1 (Helsinki Metropolitan Area)	38,111	86 ▲	156,200	242 ▲
	Lapland	10,546	62 ▲	124,876	351 ▲
	North Ostrobothnia (excl. Kuusamo)	2,892	50 ▲	18,449	307 ▲
	Kuusamo	895	4 ▲	16,921	1007 ▲
	Pirkanmaa	2,120	39 ▲	12,018	200 ▲
	Åland	3,088	14 ▲	9,306	99 ▲
	Central Finland	2,422	197 ▲	9,299	379 ▲
	Ostrobothnia	1,391	40 ▲	6,061	188 ▲
	Satakunta	1,012	26 ▲	5,871	87 ▲
	Kainuu	798	-14 ▼	5,703	104 ▲
	Päijät-Häme	989	117 ▲	4,841	153 ▲
	Uusimaa 2 (excl. Helsinki Metropolitan Area)	775	-17 ▼	4,591	1 ▼
	Kymenlaakso	583	90 ▲	2,596	97 ▲
	South Karelia	542	22 ▲	2,450	217 ▲
	Kanta-Häme	286	-65 ▼	2,030	40 ▲
	South Ostrobothnia	302	185 ▲	1,395	70 ▲
	Central Ostrobothnia	308	280 ▲	870	312 ▲



- Helsinki is the most visited area in Jan-Aug 2022 with 36% share
- Lapland is not far behind with 33% share
- The majority of Germans visit Finland during the peak summer months

Top markets in winter season 2022

And change compared to pre-pandemic

High winter season (12-02)

	Dec2018- Feb2019	Dec2021- Feb2022	Change 2022 vs. 2019
United Kingdom	334 900	278 600	-17 %
France	161 700	180 300	+11 %
Germany	151 300	133 100	-12 %
Netherlands	106 700	111 300	+4 %
Spain	59 400	55 300	-7 %
Estonia	58 200	47 400	-19 %
Belgium	30 300	45 900	+51 %
Italy	42 900	45 200	+5 %
United States	53 800	39 600	-26 %
Switzerland	51 800	37 800	-27 %
Sweden	75 100	30 200	-60 %
Poland	21 900	21 500	-2 %
Denmark	21 200	17 100	-20 %
Russia	261 300	16 100	-94 %
Austria	19 500	15 900	-18 %
China & Hong Kong	139 700	14 800	-89 %

Top destinations from Germany

Winter 2022	
Helsinki	22 133
Rovaniemi	19 404
Kuusamo	13 235
Inari (Saariselkä)	12 950
Muonio	10 357

Winter 2019	
Helsinki	32 832
Kittilä (Levi)	15 353
Muonio	13 718
Rovaniemi	12 477
Inari (Saariselkä)	9 426

Top markets in summer season 2022

And change compared to pre-pandemic

High summer season (06-08)

	Jun-Aug2019	Jun-Aug 2022	Change 2022 vs. 2019
Sweden	255 200	235 800	-8 %
Germany	270 300	229 100	-15 %
United States	109 900	103 800	-6 %
United Kingdom	90 800	74 500	-18 %
Norway	73 400	68 200	-7 %
Estonia	69 400	60 400	-13 %
Russia	243 400	60 100	-75 %
Switzerland	64 400	54 100	-16 %
France	64 100	53 800	-16 %
Netherlands	62 300	52 400	-16 %
Italy	68 200	45 700	-33 %
Spain	56 600	41 800	-26 %
Poland	31 400	35 500	+13 %
Denmark	37 700	34 200	-9 %
Austria	27 900	22 400	-20 %
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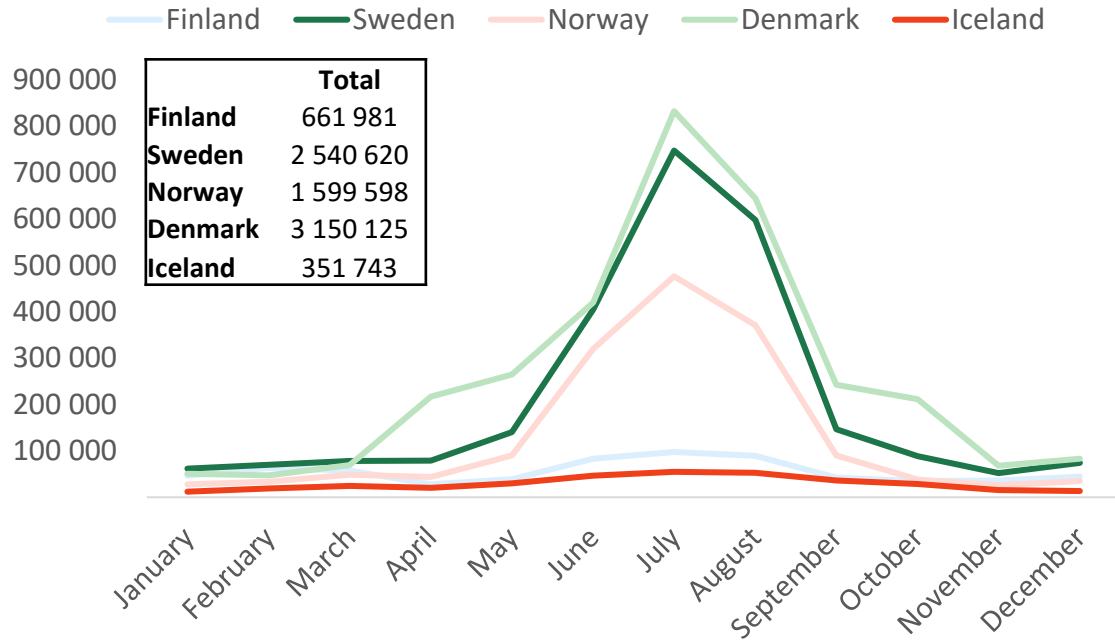
Top destinations from Germany

Summer 2022	
Helsinki	81 903
Inari (Saariselkä)	9 881
Rovaniemi	9 458
Vantaa	8 093
Savonlinna	7 652

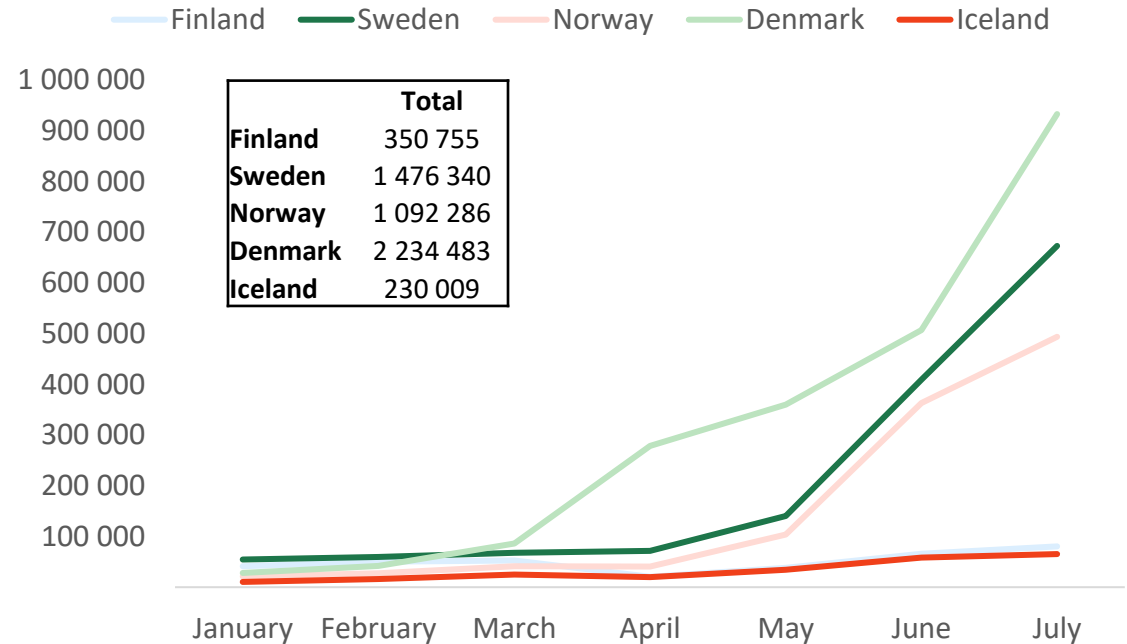
Summer 2019	
Helsinki	84 015
Turku	11 345
Inari (Saariselkä)	10 868
Rovaniemi	9 863
Kittilä (Levi)	9 367

Germany – Overnights in Nordics (Jan-Jul 2022)

German overnights in 2019



German overnights in 2022*



Change % 2022/2019

	January	February	March	April	May	June	July
Finland	-10 %	-20 %	-8 %	-25 %	-2 %	-21 %	-17 %
Sweden	-11 %	-15 %	-13 %	-10 %	0 %	1 %	-10 %
Norway	-25 %	-16 %	-15 %	-7 %	16 %	13 %	4 %
Denmark	-44 %	-10 %	24 %	28 %	36 %	21 %	12 %
Iceland	-15 %	-15 %	3 %	-1 %	15 %	27 %	20 %

Share of total:

Finland: 7%
 Sweden: 27%
 Norway: 20%
 Denmark: 42%
 Iceland: 4%

- The overwhelming majority of Germans visit the Nordics during the summer months with the exception of Denmark that also receives German visitors during the spring and autumn
- Denmark was the biggest market for German visitors in 2019 with over 3 million overnights. Finland was fourth with just under 700 000 overnights
- Denmark has exceeded the 2019 levels every month since March this year and with the exception of April, so has Iceland. Norway exceeded 2019 overnights in May-July and Sweden in June. Finland has not reached 2019 levels yet

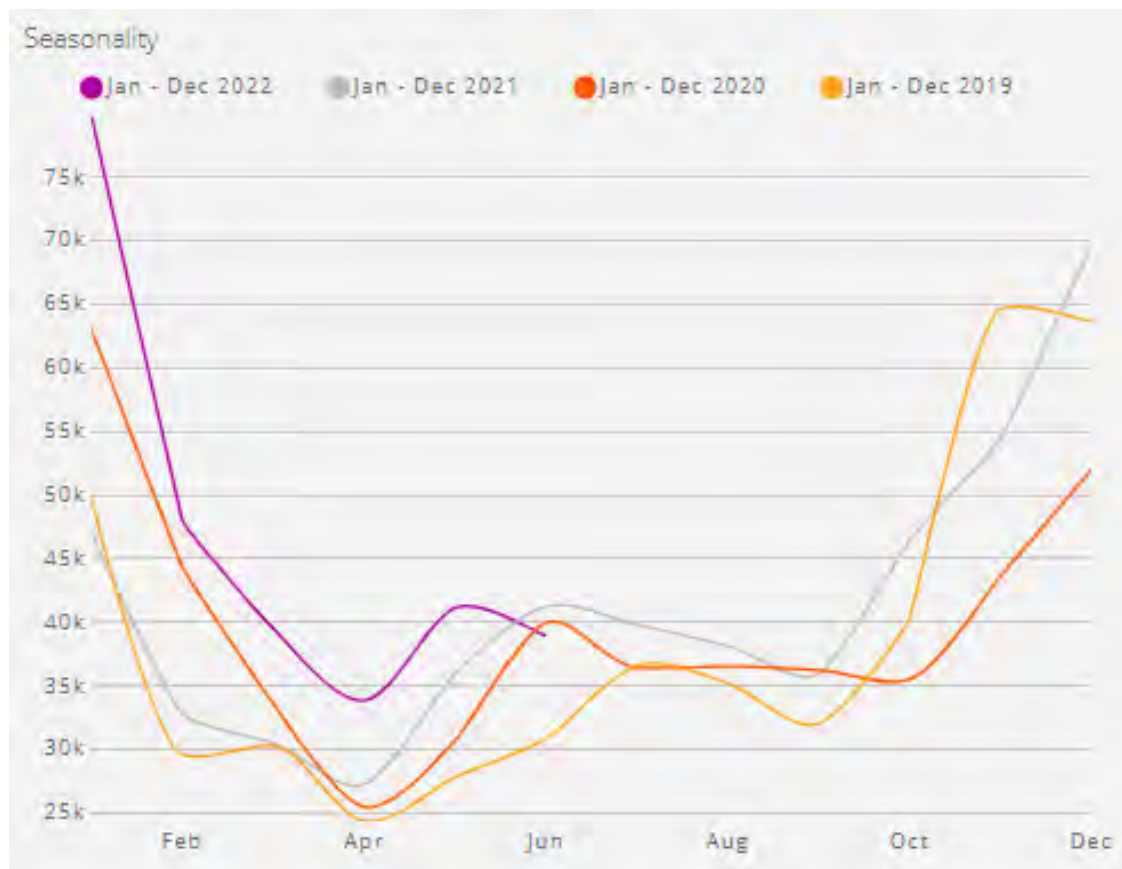


Digital Demand – Travel Related Internet Searches

Q1/2022 & Q2/2022

Germany: Searches in Q1 & Q2 2022

Q1/2022



Target Market Distribution

Rank	Flag	Target Market	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%
9		Estonia	48,181	26.1%
10		India	39,253	20.4%

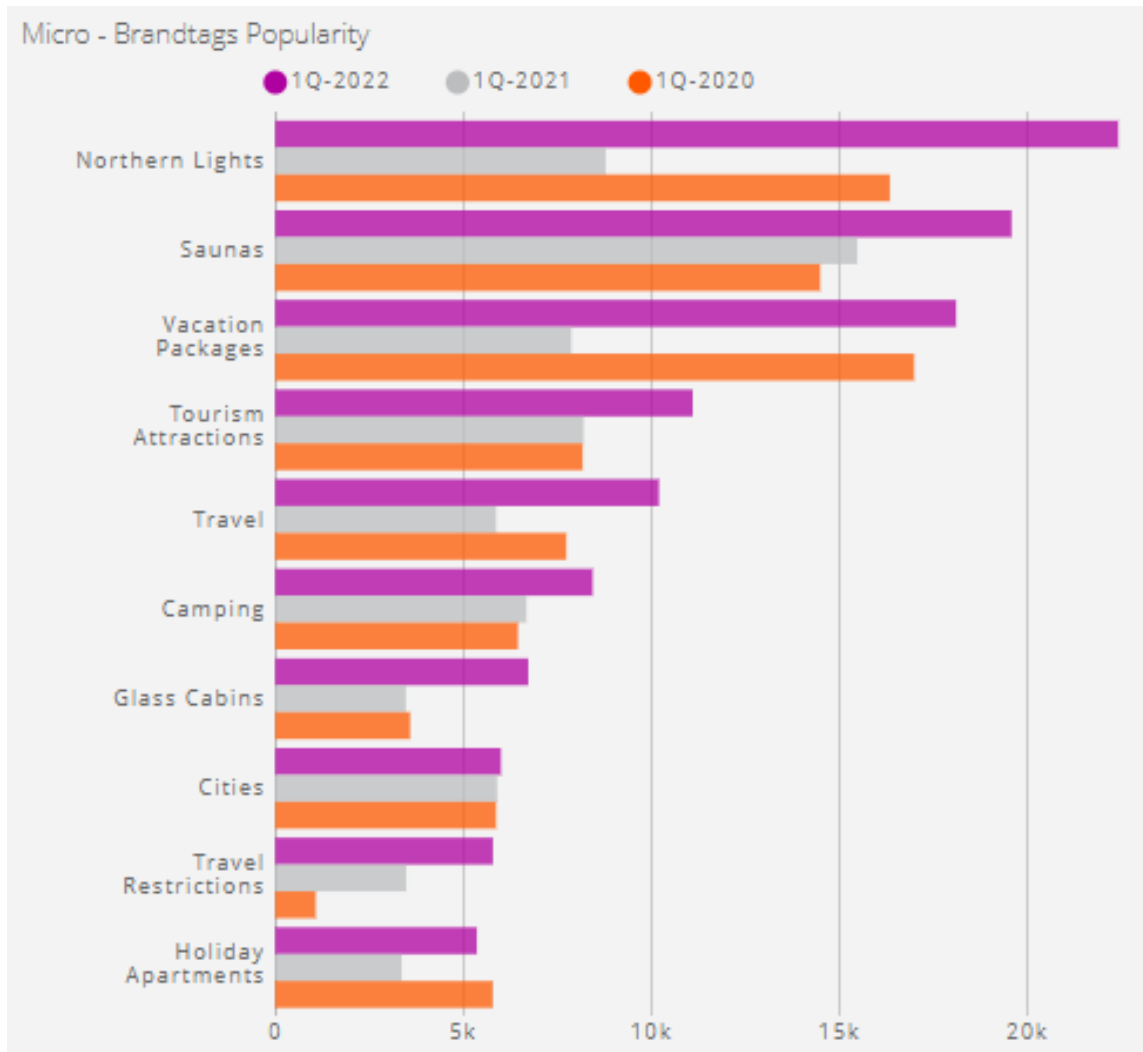
Q2/2022

Target Market Distribution

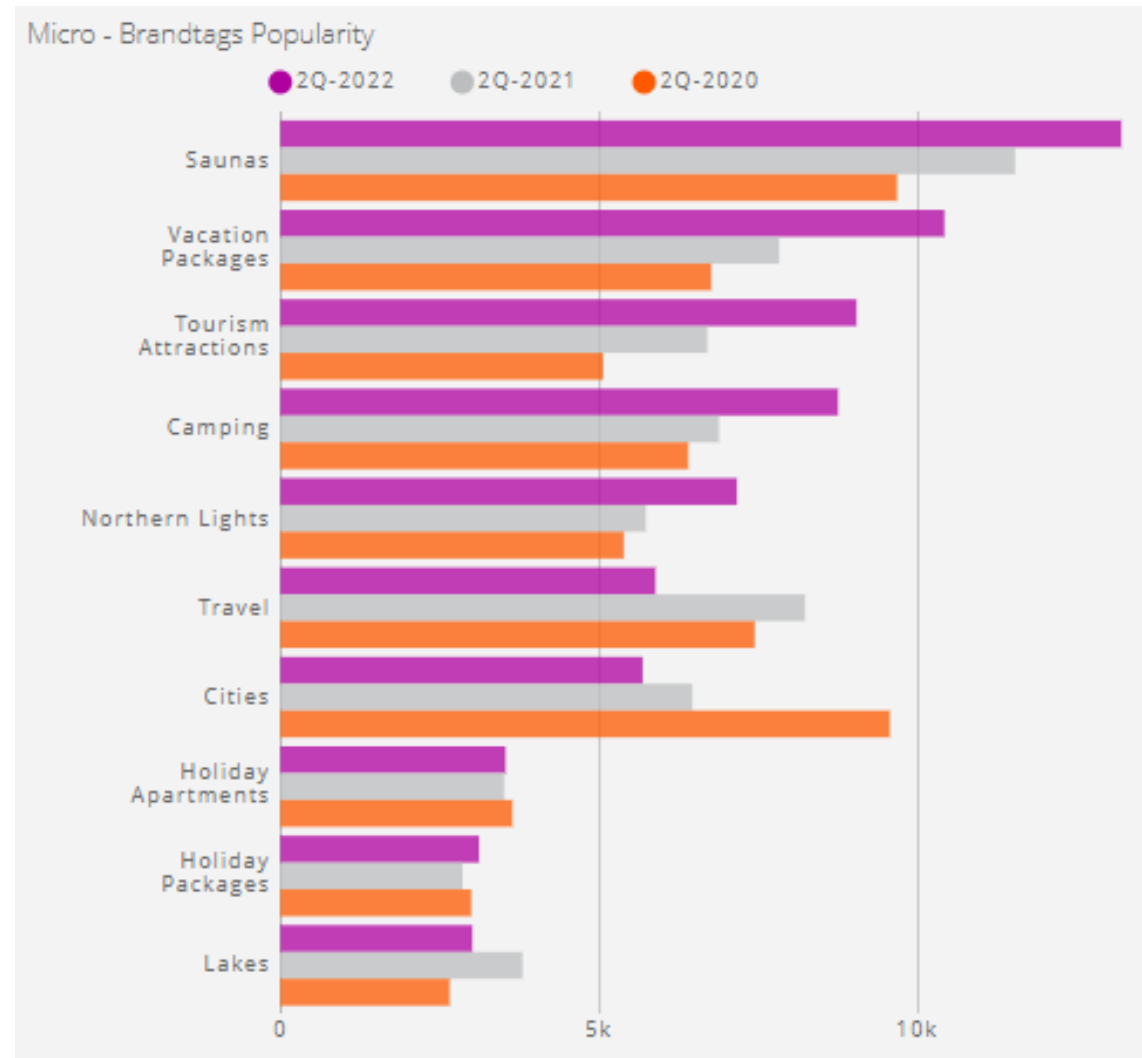
Rank	Flag	Target Market	Searches	Growth
1		United States	134,907	39.5%
2		Japan	119,932	16.7%
3		Germany	113,935	9.1%
4		United Kingdom	68,831	27.8%
5		Italy	59,885	15.9%
6		France	54,190	26.7%
7		Spain	52,910	35.9%
8		Estonia	41,686	11.6%
9		India	38,792	2.9%
10		Sweden	37,606	18.8%

Germany: Most searched topics

Q1/2022



Q2/2022





ForwardKeys – Air travel & Seat capacity

November 2022 – February 2023

Air bookings for November 2022-February 2023

Comparison with pre-pandemic

Destination benchmark
YOYPP of tourist arrivals

German arrivals / bookings vs. pre-pandemic



Bookings from November 2022 to February 2023



Bookings from November 2022 to February 2023

	November	December	January	February
Finland	4 072	5 375	2 149	1 951
Sweden	2 552	3 931	770	621
Norway	2 755	3 865	1 407	1 369
	November	December	January	February
Finland	-12 %	-19 %	1 %	-29 %
Sweden	-32 %	-33 %	-22 %	-21 %
Norway	-20 %	-15 %	-20 %	-23 %

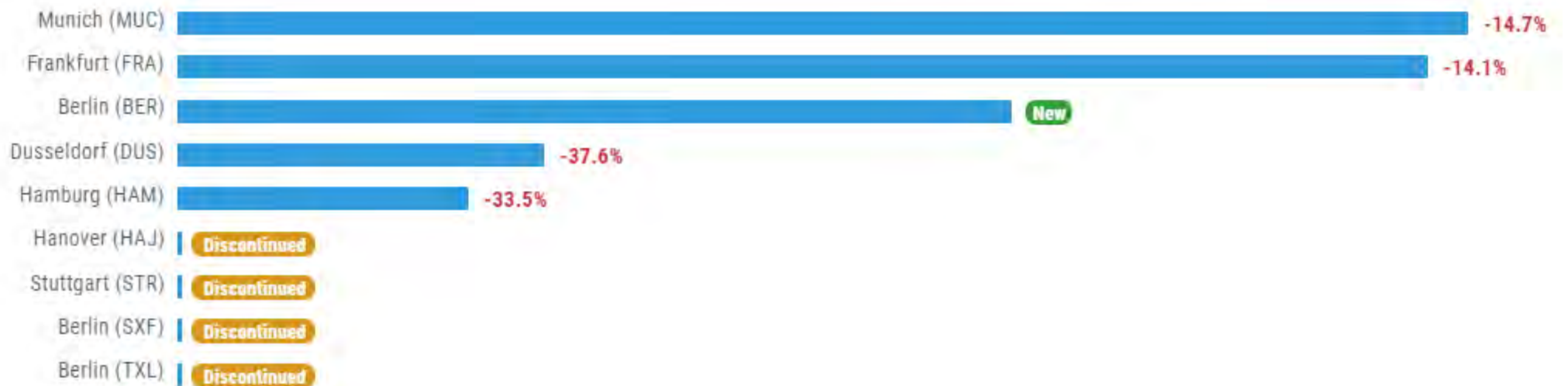
Capacity for November 2022-February 2023

Comparison with pre-pandemic Germany to Finland

Overview of capacity

Flight origins

5 airports **-29.2%** YOYPP for selected locations



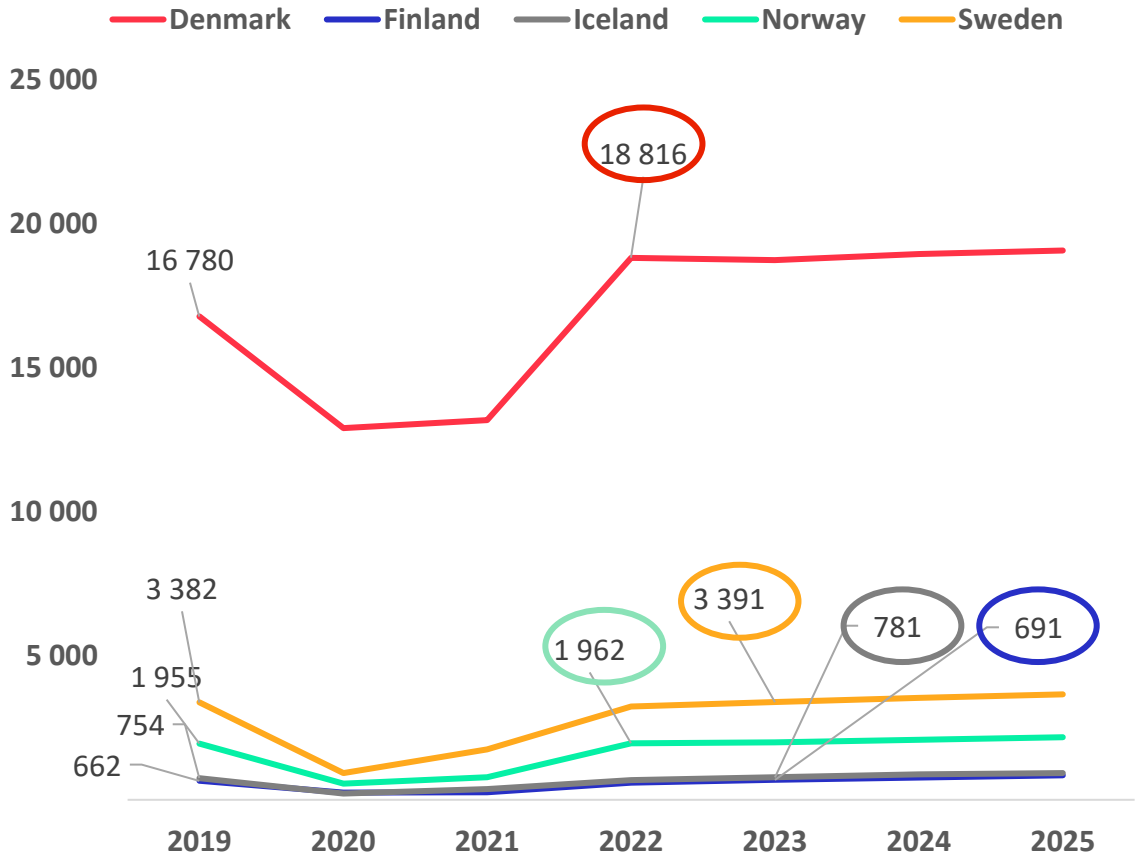


Oxford Economics – Overnights & Spending

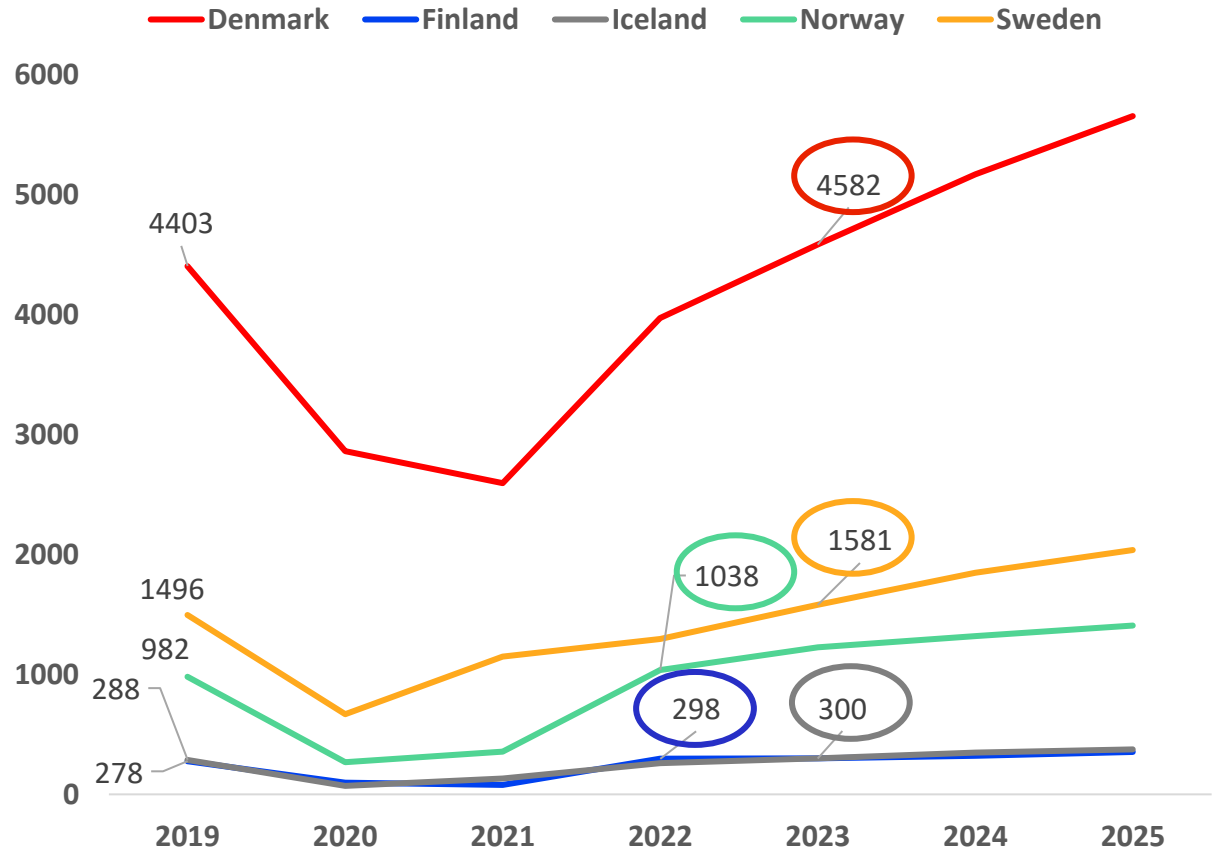
Recovery forecast

Oxford Economics forecast: German Overnights & Spending

German Overnights Recovery Forecast



German Spending (USD Millions) Recovery Forecast



- German overnights are predicted to recover in Finland, Iceland and Sweden in 2023. Denmark and Norway, however, will return to 2019 level already this year. In 2023 Denmark is predicted by 12% ahead of 2019 and Finland 4%
- Spending, however, is forecasted to return to 2019 levels in Finland already this year. The same prediction is for Norway. The rest of the Scandinavian countries are predicted to recover in 2023





Sustainability

AS Media Impact Marktforschung in
Cooperation with VIR 2022

The awareness of sustainability grows further...

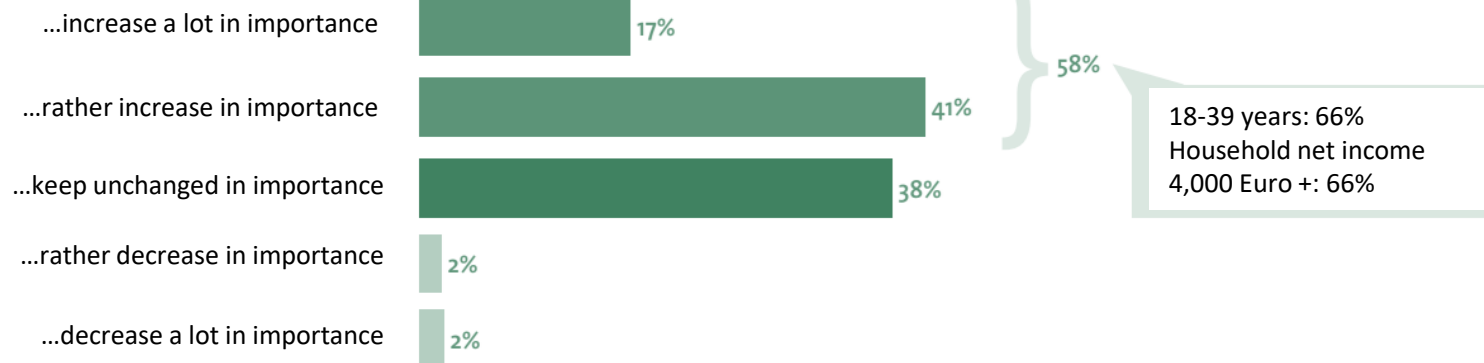
...particularly in the target group of Finland as a tourism destination

Sustainability

General awareness for sustainability

Basis: German speaking population 18+ years, n=2,500; Source: AS Media Impact Marktforschung in Cooperation with VIR 2022

over the next 3 years, sustainability as a key factor in my purchasing decisions will...



- 58% say that sustainability will increase in importance for their purchasing decisions
- In one of the main target groups of Finland as a tourism destination, namely households with higher income from 18-39 years, this share is even higher and reaches two of three people

Consumers expect the industry to move first

Finland could be a driver to push this development.

Sustainability

Expectations and factors for sustainable travel

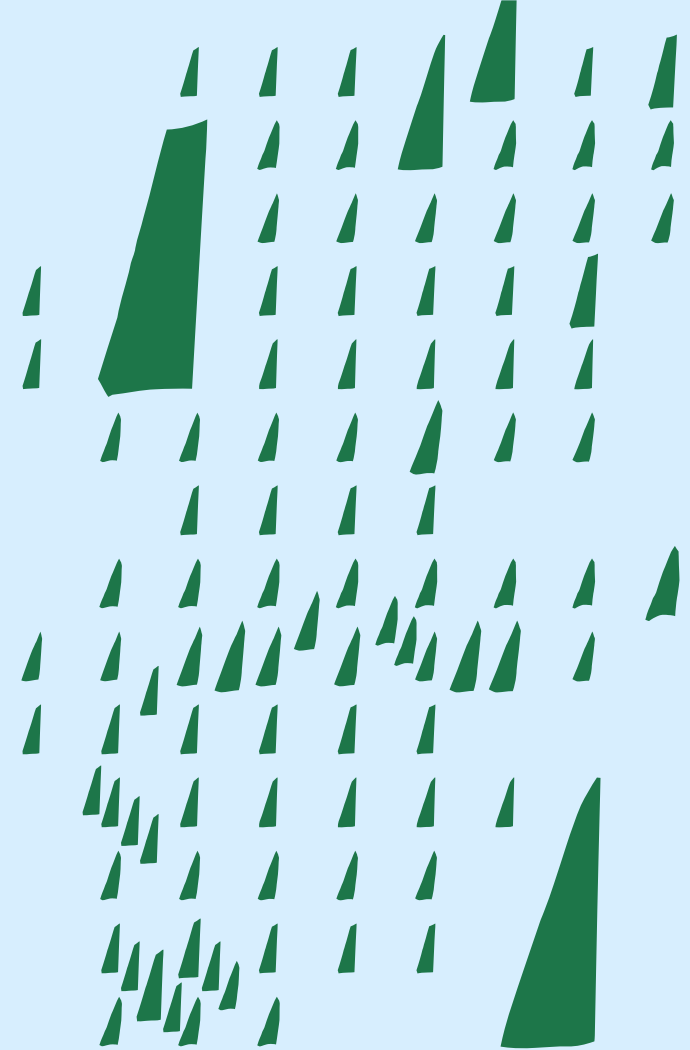
Basis: German speaking population 18+ years, n=2,500; Source: AS Media Impact Marktforschung in Cooperation with VIR 2022



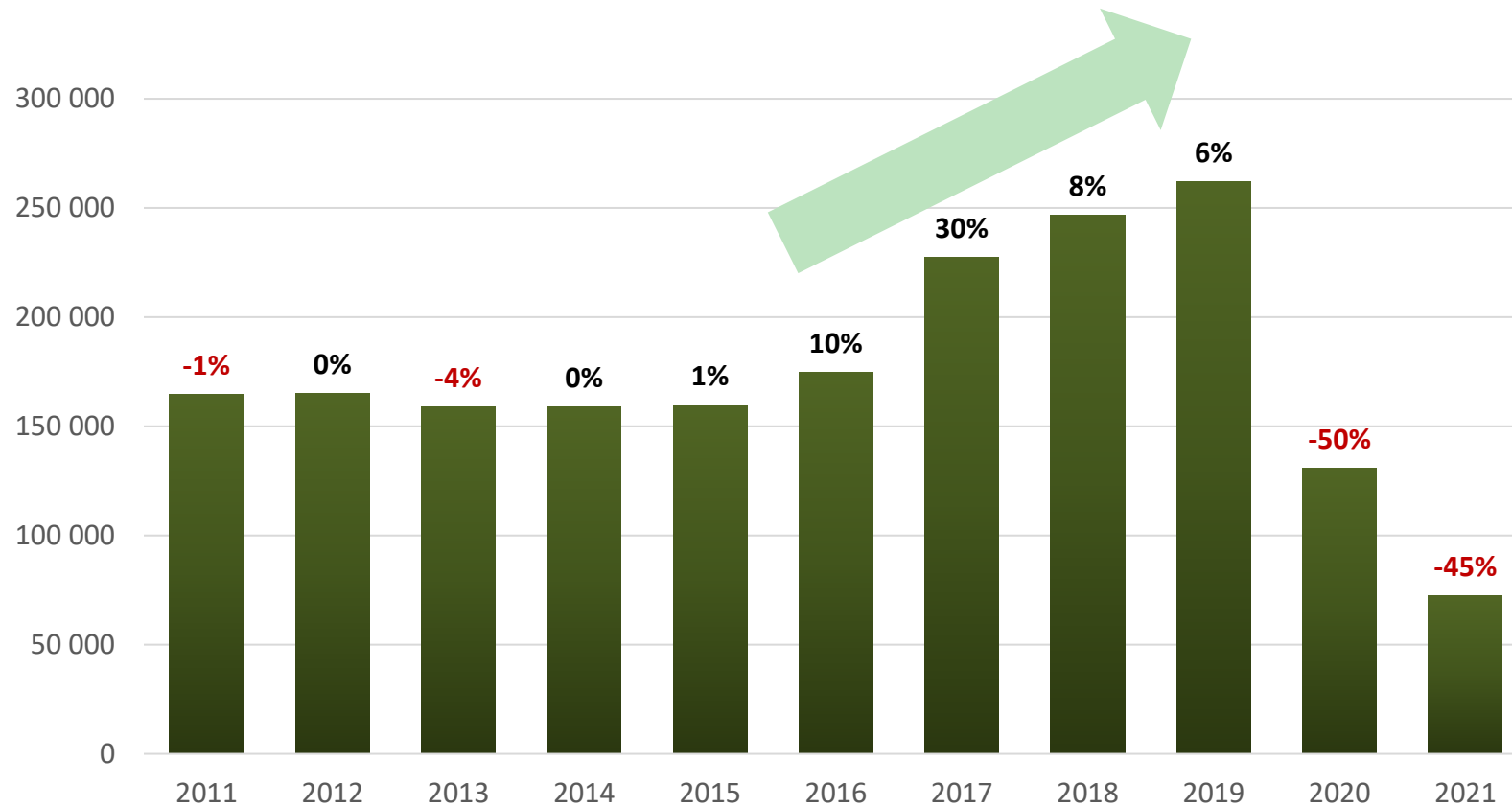
- Consumers see the travel providers as responsible for sustainable travel. In particular, the comparability of prices and corresponding filter and search options are demanded.
- A total of 69% see travel providers as having an obligation to make sustainable travel easier.

Netherlands insights

- **Overnights Finland and Nordics**
- **Digital Demand – Travel Related Internet Searches**
- **Forward Keys – Flight bookings and Capacity data**
- **Oxford Economics – Recovery Forecast**



Netherlands – overnights in Finland 2011-2021



2021
72,000 nights
YoY change -45%

2019
262,000 nights
2021 vs. 2019 -72%

Netherlands – Cumulative overnights in 2022

Nationality	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
Germany	81,420	55 ▲	432,775	228 ▲
Sweden	72,744	133 ▲	340,215	290 ▲
France	22,904	94 ▲	239,838	771 ▲
United Kingdom	27,699	251 ▲	206,335	741 ▲
Netherlands	19,874	66 ▲	198,193	541 ▲
United States	34,569	204 ▲	172,988	308 ▲
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Spain	20,839	127 ▲	89,598	286 ▲
Russia	38,680	857 ▲	82,192	368 ▲
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Poland	12,853	95 ▲	70,828	137 ▲
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Czech Republic	4,602	91 ▲	30,965	267 ▲
Lithuania	5,925	111 ▲	30,417	171 ▲
Ukraine	5,751	63 ▲	29,200	166 ▲

- There are already almost **200 000** Dutch overnights so far this year and the busiest month has been February that saw over **46 000** nights
- Netherlands is currently the fifth biggest source market in Finland

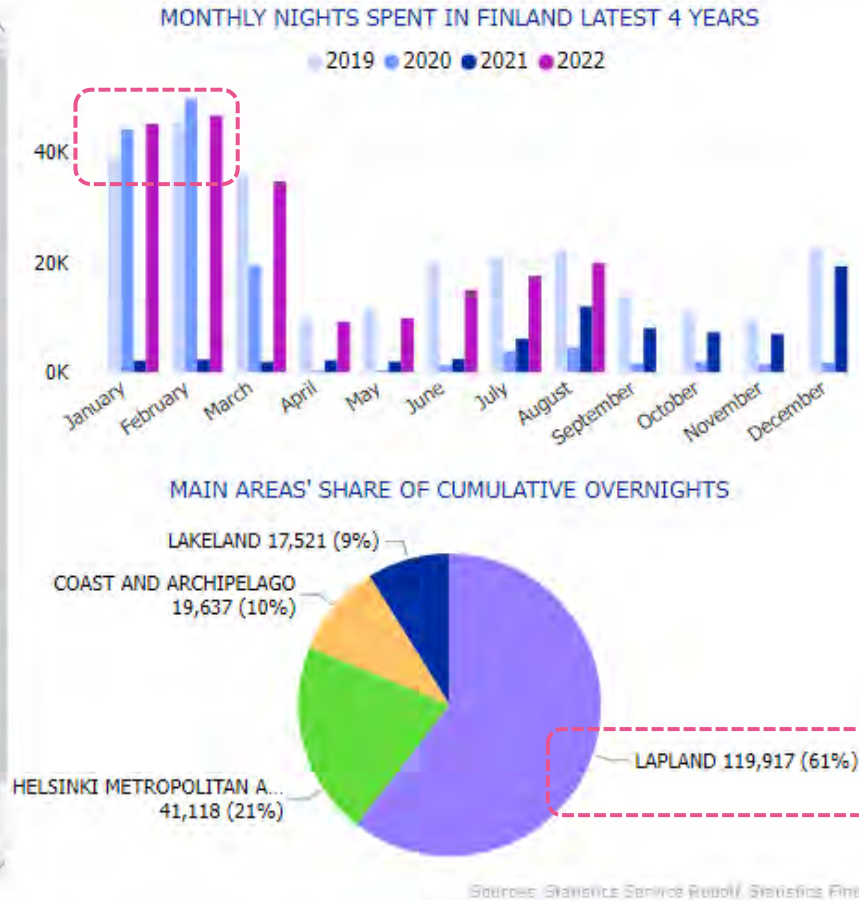
Netherlands – Cumulative overnights in 2022

August
2022

4. OVERNIGHTS IN REGIONS BY TARGET MARKETS

VISIT
FINLAND

Target market	Region	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
Netherlands	Lapland	5,320	257 ▲	108,162	3782 ▲
	Uusimaa 1 (Helsinki Metropolitan Area)	7,533	42 ▲	41,118	239 ▲
	Kuusamo	565	86 ▲	11,755	2169 ▲
	North Ostrobothnia (excl. Kuusamo)	1,064	104 ▲	9,625	543 ▲
	Central Finland	960	83 ▲	6,492	66 ▲
	Pirkanmaa	414	7 ▲	2,730	117 ▲
	Kainuu	297	-12 ▼	2,135	321 ▲
	Uusimaa 2 (excl. Helsinki Metropolitan Area)	216	19 ▲	1,450	22 ▲
	Ostrobothnia	246	17 ▲	1,333	66 ▲
	Satakunta	175	150 ▲	1,105	48 ▲
	Kymenlaakso	81	-30 ▼	1,076	124 ▲
	Päijät-Häme	223	54 ▲	1,027	149 ▲
	Åland	263	-26 ▼	920	31 ▲
	South Karelia	160	-8 ▼	779	98 ▲
	Central Ostrobothnia	62	158 ▲	646	1368 ▲
	Kanta-Häme	84	163 ▲	410	512 ▲
	South Ostrobothnia	38	-55 ▼	211	2 ▼



- Lapland is overwhelmingly the biggest host for Dutch visitors with a 61% share of total in Jan-Aug 2022
- There are already almost 200 000 overnights this year but the winter season is clearly the biggest attraction for Dutch visitors in Finland and Lapland's share of these is 108 000 nights
- 2019 levels were exceeded in January-February 2022

Top markets in winter season 2022

And change compared to pre-pandemic

High winter season (12-02)

	Dec2018- Feb2019	Dec2021- Feb2022	Change 2022 vs. 2019
United Kingdom	334 900	278 600	-17 %
France	161 700	180 300	+11 %
Germany	151 300	133 100	-12 %
Netherlands	106 700	111 300	+4 %
Spain	59 400	55 300	-7 %
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United States	53 800	39 600	-26 %
Switzerland	51 800	37 800	-27 %
Sweden	75 100	30 200	-60 %
Poland	21 900	21 500	-2 %
Denmark	21 200	17 100	-20 %
Russia	261 300	16 100	-94 %
Austria	19 500	15 900	-18 %
China & Hong Kong	139 700	14 800	-89 %

Top destinations from The Netherlands

Winter 2022	
Kolari (Ylläs)	17 148
Inari (Saariselkä)	15 695
Kittilä (Levi)	14 076
Kuusamo	9 000
Salla	7 675

Winter 2019	
Kittilä (Levi)	15 225
Kolari (Ylläs)	12 282
Helsinki	11 649
Kuusamo	11 502
Inari (Saariselkä)	11 215

Top markets in summer season 2022

And change compared to pre-pandemic

High summer season (06-08)

	Jun-Aug2019	Jun-Aug 2022	Change 2022 vs. 2019
Sweden	255 200	235 800	-8 %
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Russia	243 400	60 100	-75 %
Switzerland	64 400	54 100	-16 %
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Netherlands	62 300	52 400	-16 %
Italy	68 200	45 700	-33 %
Spain	56 600	41 800	-26 %
Poland	31 400	35 500	+13 %
Denmark	37 700	34 200	-9 %
Austria	27 900	22 400	-20 %
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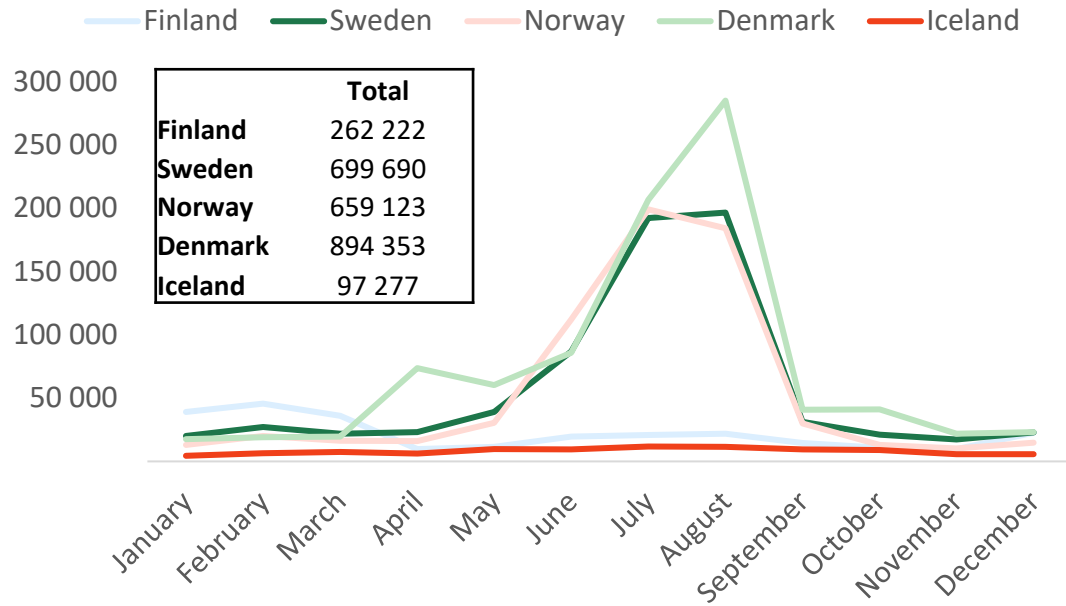
Top destinations from The Netherlands

Summer 2022	
Helsinki	16 568
Rovaniemi	3 696
Vantaa	2 656
Inari (Saariselkä)	2 360
Sodankylä	1 774

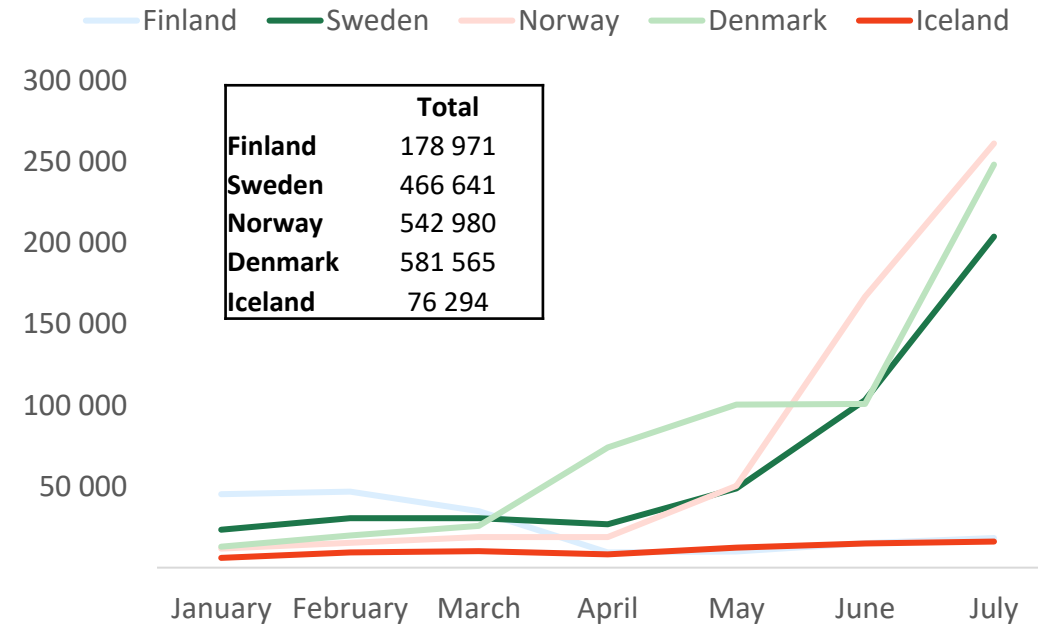
Summer 2019	
Helsinki	18 730
Rovaniemi	4 026
Inari (Saariselkä)	3 007
Vantaa	2 275
Turku	2 121

Netherlands – Overnights in Nordics (Jan-Jul 2022)

Dutch overnights in 2019



Dutch overnights in 2022*



Change % 2022/2019

	January	February	March	April	May	June	July
Finland	16 %	3 %	-3 %	-6 %	-15 %	-23 %	-13 %
Sweden	16 %	11 %	39 %	15 %	24 %	19 %	6 %
Norway	-11 %	-24 %	15 %	17 %	65 %	49 %	31 %
Denmark	-27 %	2 %	30 %	1 %	67 %	18 %	20 %
Iceland	31 %	42 %	35 %	30 %	26 %	57 %	36 %

Share of total:

- Finland: 10%
- Sweden: 25%
- Norway: 29%
- Denmark: 31%
- Iceland: 4%

- The majority of Dutch visitors come in the summer. Denmark receives visitors also in April and Finland's dominance in the winter is demonstrated in the graphs
- Denmark was the biggest market for Dutch visitors in 2019 with almost 900 000 overnights. Finland was fourth with 262 000 overnights
- Iceland and Sweden are ahead of 2019 figures every month this year. Denmark, too, with the exception of January. Norway has exceeded the 2019 levels every month since March. Finland exceeded the 2019 levels in January and February but has since fallen behind the other Nordics



Digital Demand – Travel Related Internet Searches

Q1/2022 & Q2/2022

Netherlands: Searches in Q1 & Q2 2022



Q1/2022

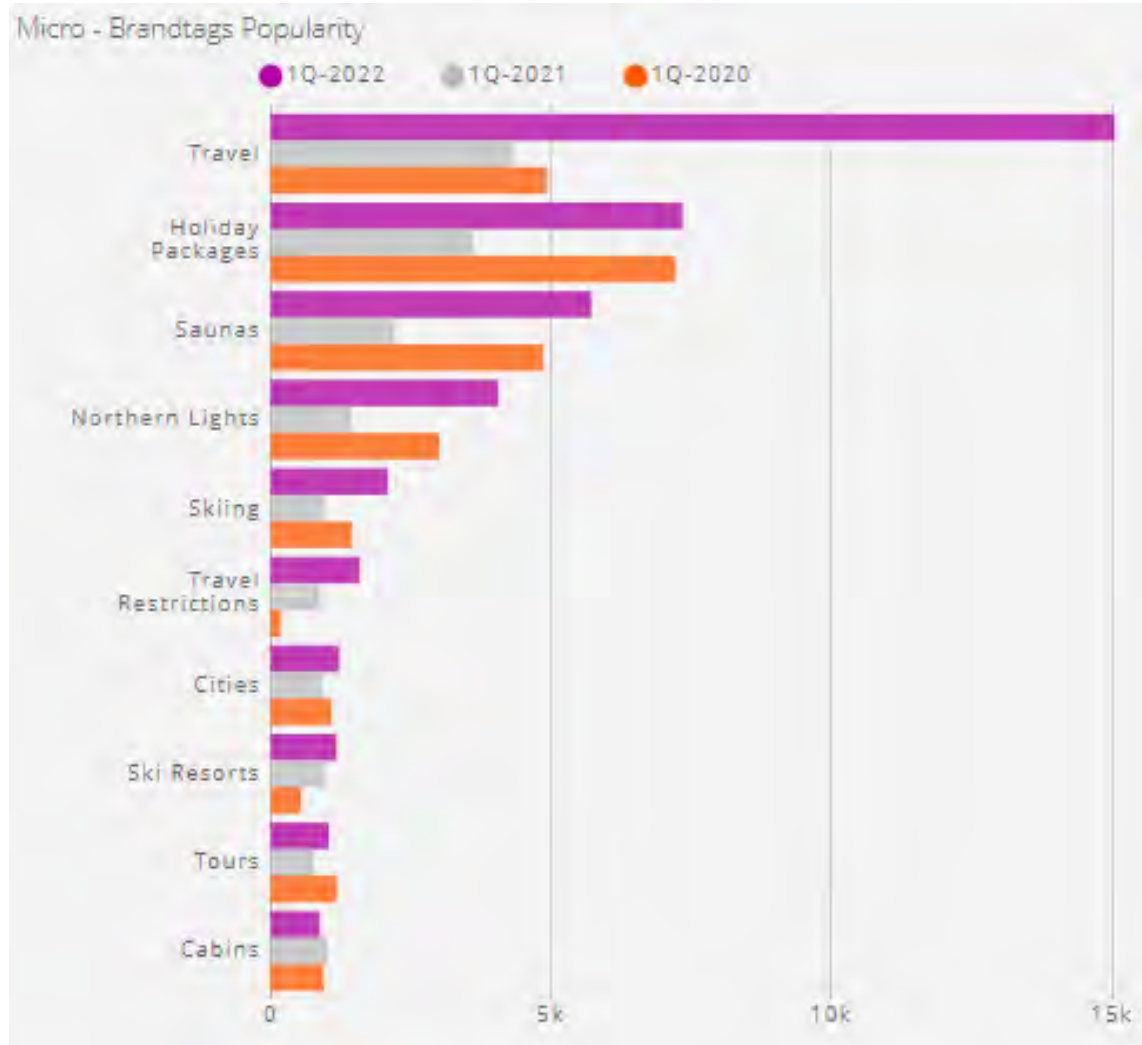
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%
9		Estonia	48,181	26.1%
10		India	39,253	20.4%

Q2/2022

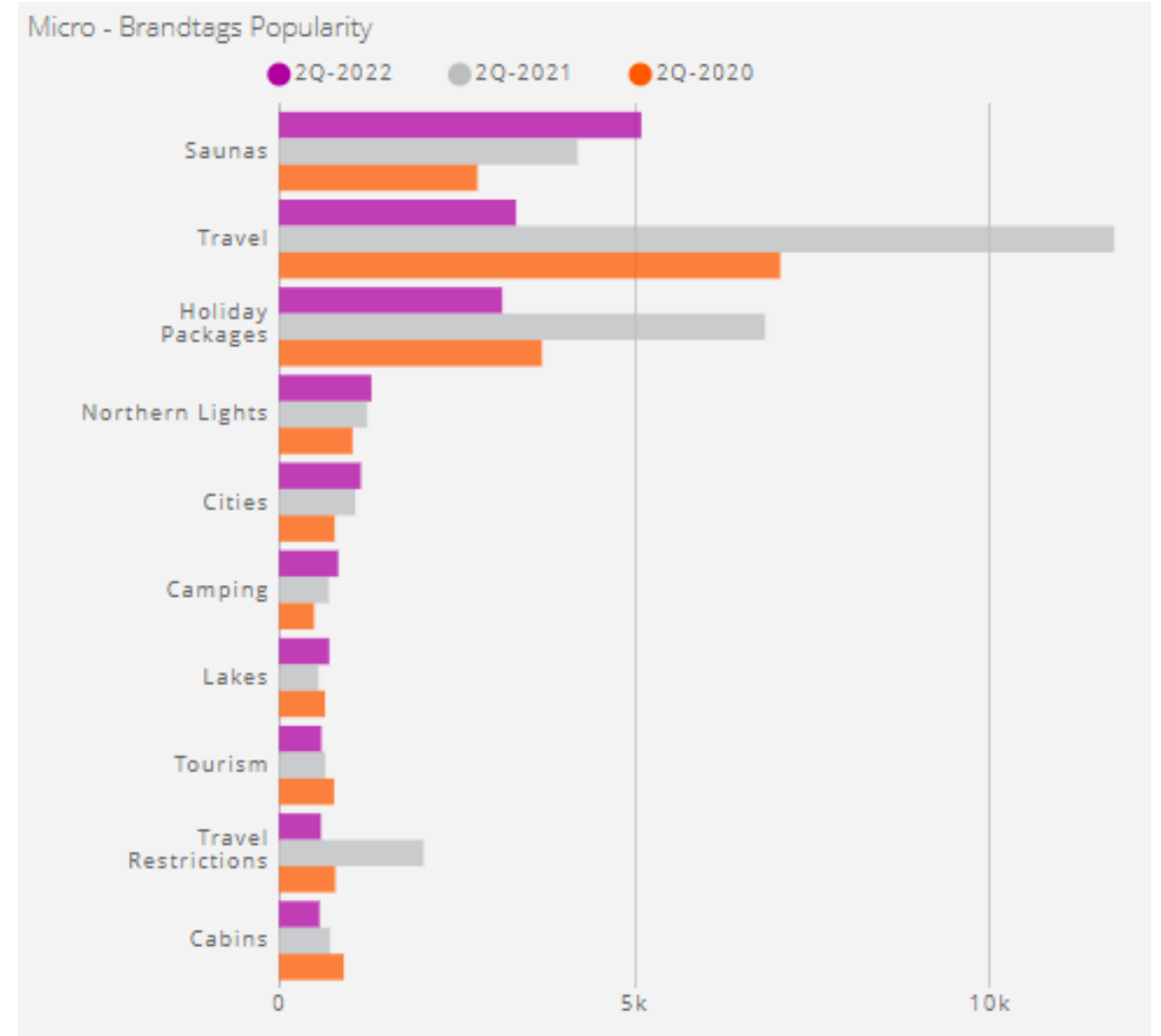
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
11		Canada	33,637	47.1%
12		Netherlands	31,464	-25.6%
13		Switzerland	27,948	15.6%
14		Australia	20,666	73.8%
15		Austria	18,914	18.6%
16		China	18,071	0.3%
17		Belgium	16,922	-0.4%
18		South Korea	12,949	22.0%
19		Russia	0	-100.0%

Netherlands: Most searched topics

Q1/2022



Q2/2022





ForwardKeys – Air travel & Seat capacity

November 2022 – February 2023

Air bookings for November 2022-February 2023

Comparison with pre-pandemic

Destination benchmark
YOYPP of tourist arrivals

Dutch arrivals / bookings vs. pre-pandemic



Bookings from November 2022 to February 2023



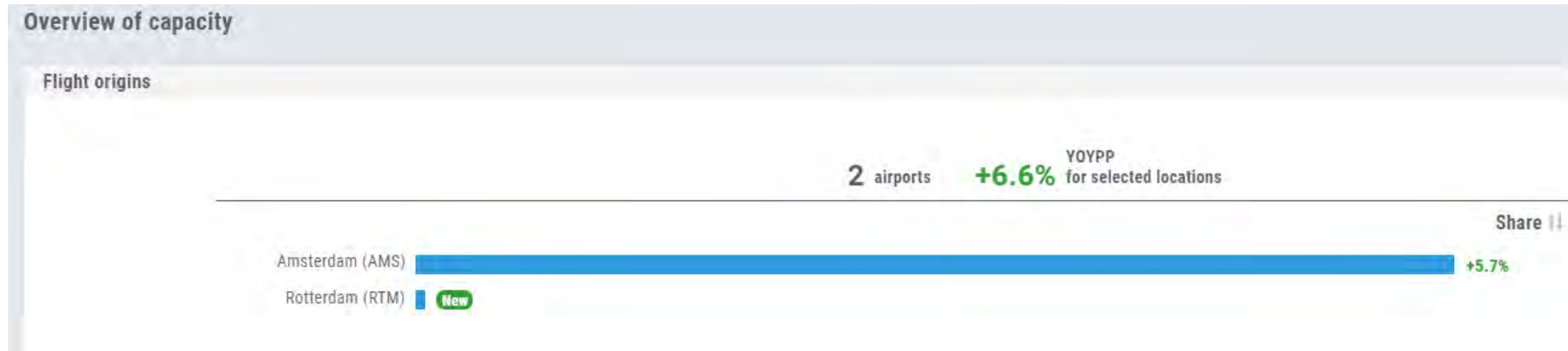
Bookings from November 2022 to February 2023

	November	December	January	February
Finland	1 301	1 830	851	638
Sweden	1 629	1 674	227	341
Norway	1 920	2 215	581	741

	November	December	January	February
Finland	8 %	-23 %	30 %	-31 %
Sweden	-35 %	-34 %	-54 %	-39 %
Norway	-16 %	-24 %	-20 %	-44 %

Capacity for November 2022 - February 2023

Comparison with pre-pandemic Netherlands to Finland



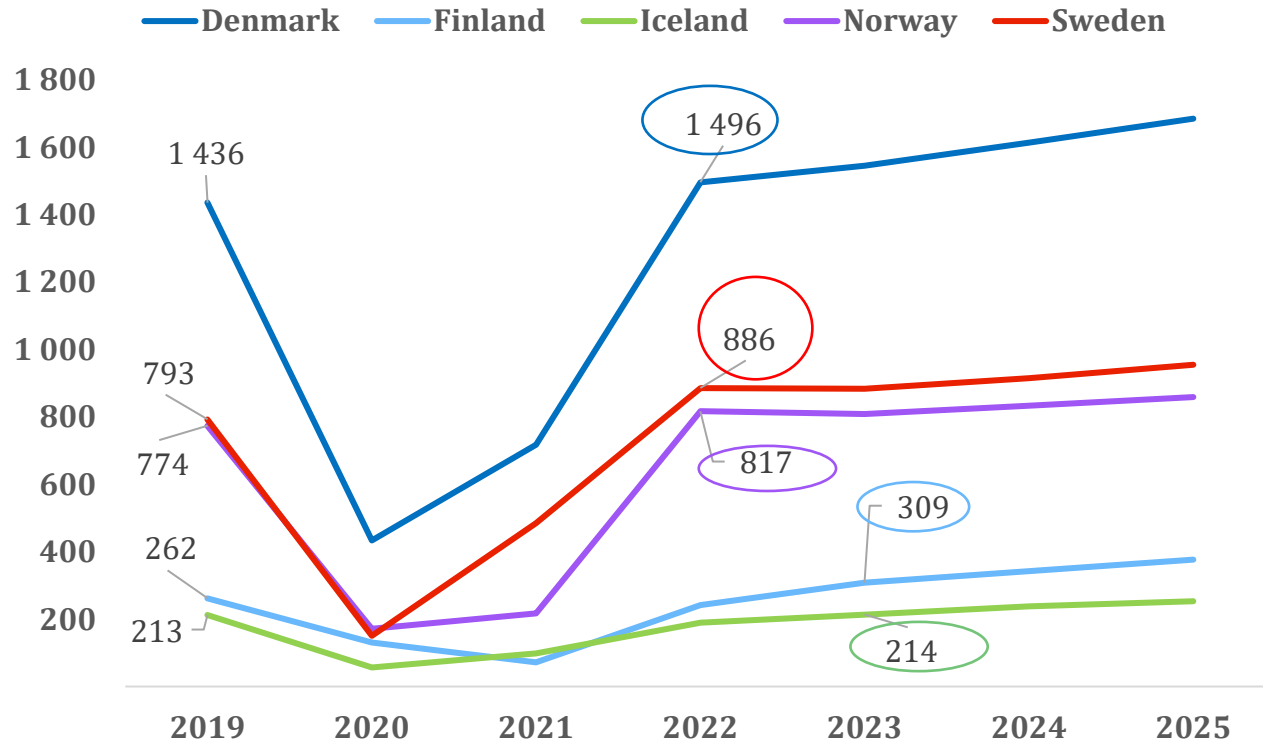


Oxford Economics – Overnights & Spending

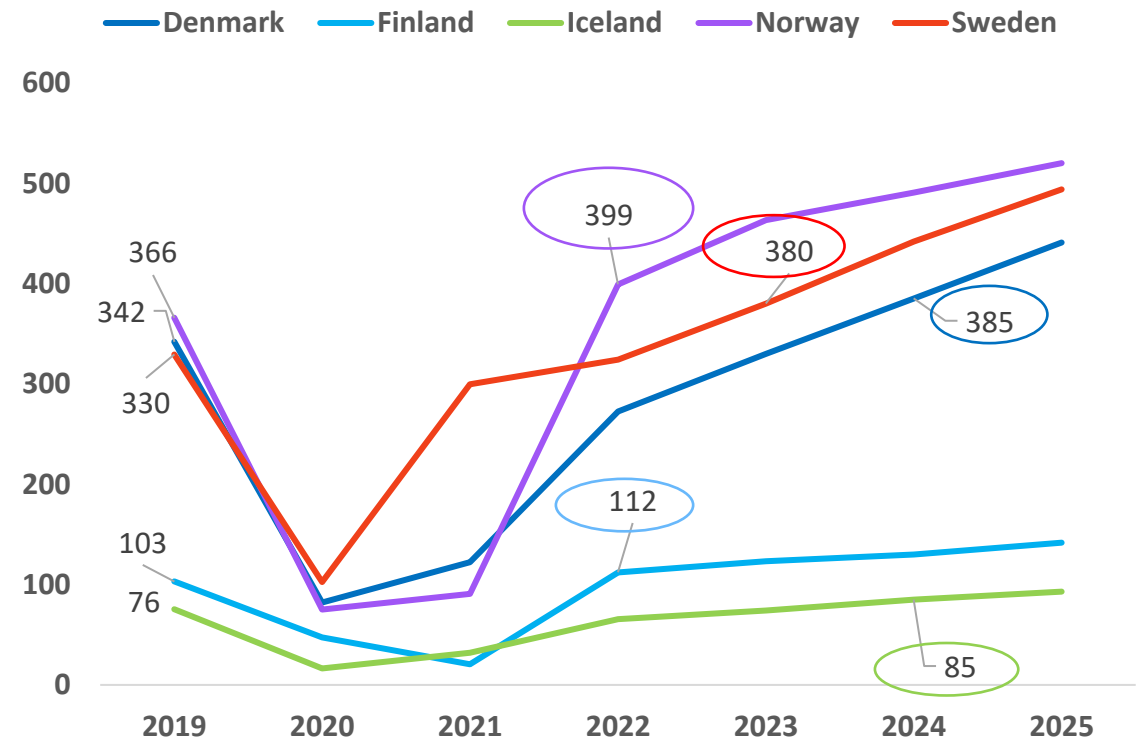
Recovery forecast

Oxford Economics forecast: Dutch Overnights & Spending

Dutch Overnights Recovery Forecast

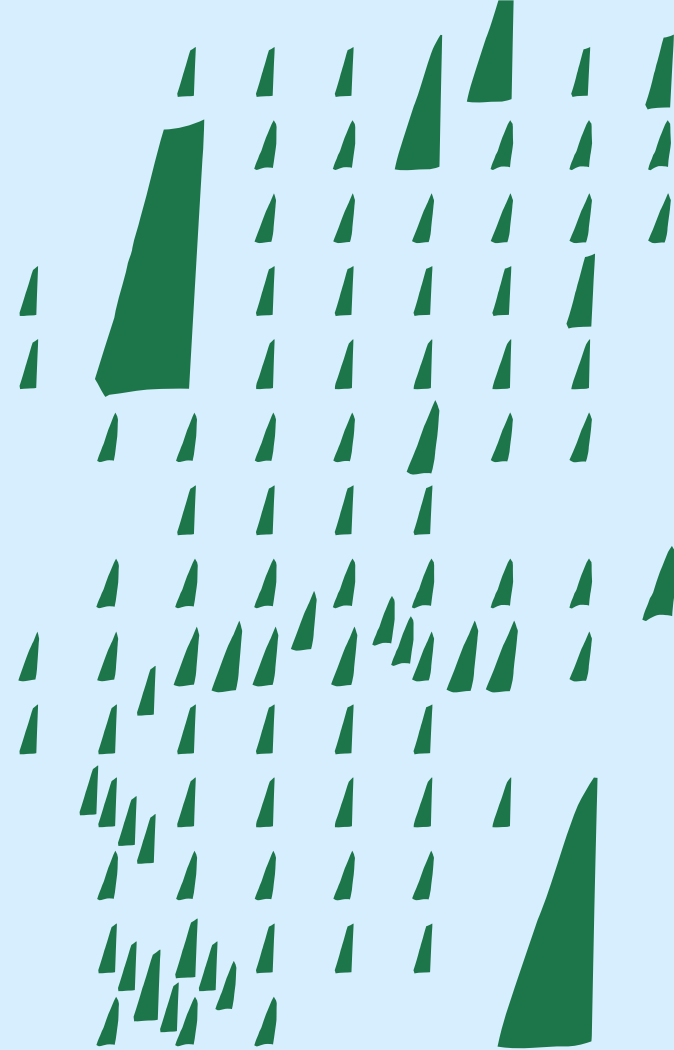


Dutch Spending (USD Millions) Recovery Forecast



- In year 2019 you can see the situation pre-pandemic. Circled amounts are reflecting those years where each country will have recovered to the pre-pandemic level
- In overnights Denmark, Norway and Sweden are predicted to recover this year and Finland and Iceland next year. In spending, Finland and Norway are all forecasted to recover this year, Sweden next year and Iceland and Denmark in 2024

Thank You!



Visit Finland team Berlin

From left: Suvi Pribilla, Jyrki Oksanen and Sara Snäll



Whats up in Germany today

General situation

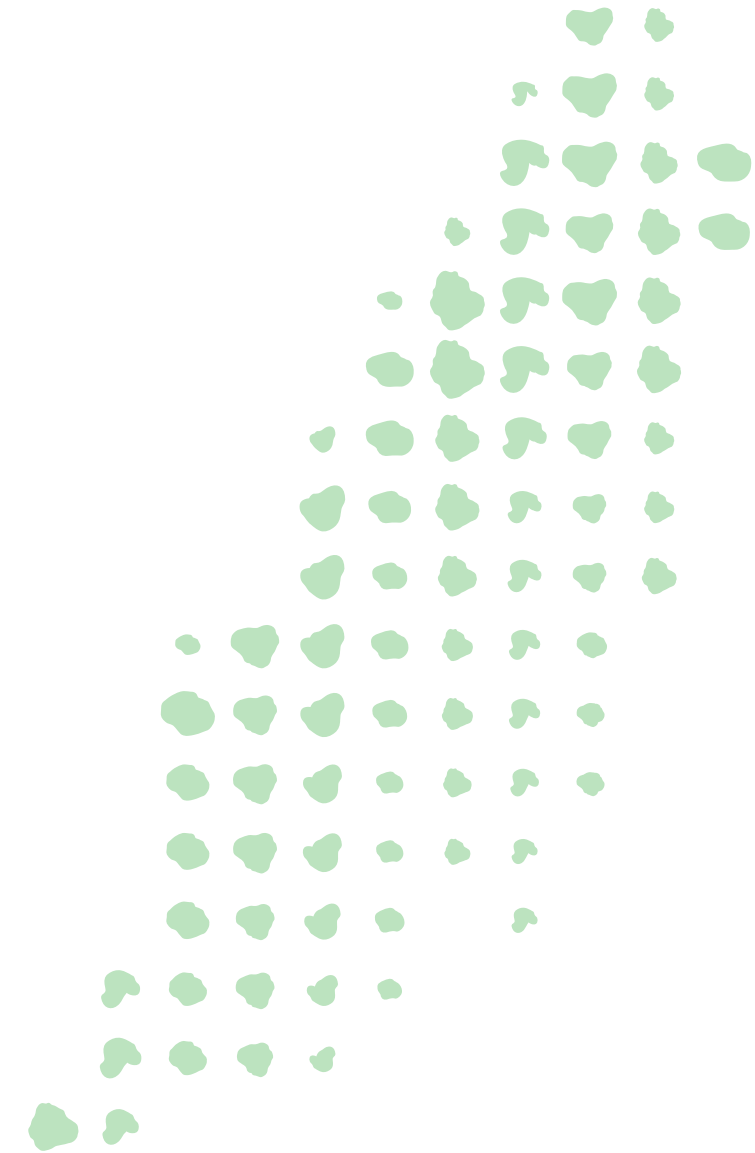
- Consumer climate is at a **very low level** due to the Ukraine war and disruption of supply chains causing an enormous increase in cost of living (inflation 10% currently)
- However, the **desire of Germans for holidays is unbroken**. Holiday is one of the last items to save at

Accessibility, focus on summer 2022

- For flight bookings, there is the challenge of lower capacities compared to 2019 (**about 20% less**), 2019 result can't be expected
- The wideness of the **product range has been shrinking as well by roughly 20%**.

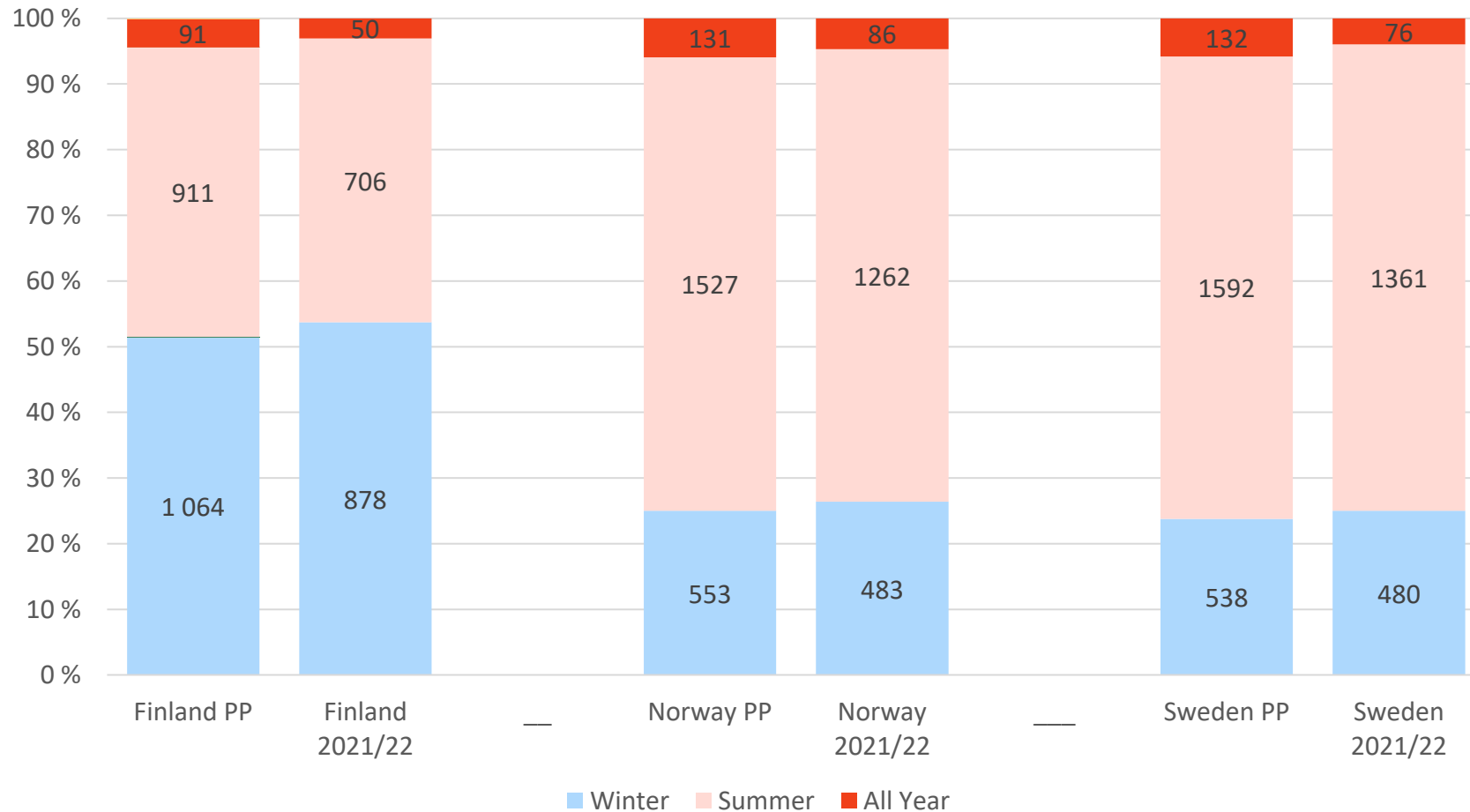
Sustainability

- The awareness of sustainability grows further, particularly in the target group of Finland as a tourism destination. **Consumers expect the industry to move first**
- **Finland has the momentum to push sustainable development**



More than half of the products for FI are for winter season

Number of products (%), Source market: Germany, wo. Reseller, Winter 2021/22, Summer 2022 vs. PP*



- There is a strong focus on the Winter Season vor Finland compared to SE and NO, even more when taking into account that the split of the total German Travel market would be 1/3 Winter, 2/3 Summer
- Finland is underrepresented for Summer holiday products but as we have seen in our last market analysis also regarding overnights and search
- Summer topics are not top of mind for Finland so far

Germany Finland airline routes healthy

Here load factors June-August 2022: health status high!

Load factor estimates

Airport of origin	Airport at destination	Operating airline	Business model	Scheduled seats	Avg load factor	Health status
Munich (MUC)	Helsinki (HEL)	Lufthansa	Full service carrier	47,034	97%	high
Berlin (BER)	Helsinki (HEL)	Finnair	Full service carrier	45,074	78%	high
Frankfurt (FRA)	Helsinki (HEL)	Lufthansa	Full service carrier	41,223	92%	high
Munich (MUC)	Helsinki (HEL)	Finnair	Full service carrier	28,142	82%	high
Frankfurt (FRA)	Helsinki (HEL)	Finnair	Full service carrier	26,972	81%	high
Hamburg (HAM)	Helsinki (HEL)	Finnair	Full service carrier	16,474	76%	high
Dusseldorf (DUS)	Helsinki (HEL)	Finnair	Full service carrier	15,822	76%	high

Finnlines campaign

Joint promotion with one Lakeland, Archipelago, Espoo and Pohjola Route ++

Results 2022 (as per mid August 2022)



+26% more individual German tourists travelling Travemünde-Helsinki v.v. from **January until July 2022** compared to 2019



+27% more individual German tourists travelling Travemünde-Helsinki v.v. from **January until March 2022** compared to 2019



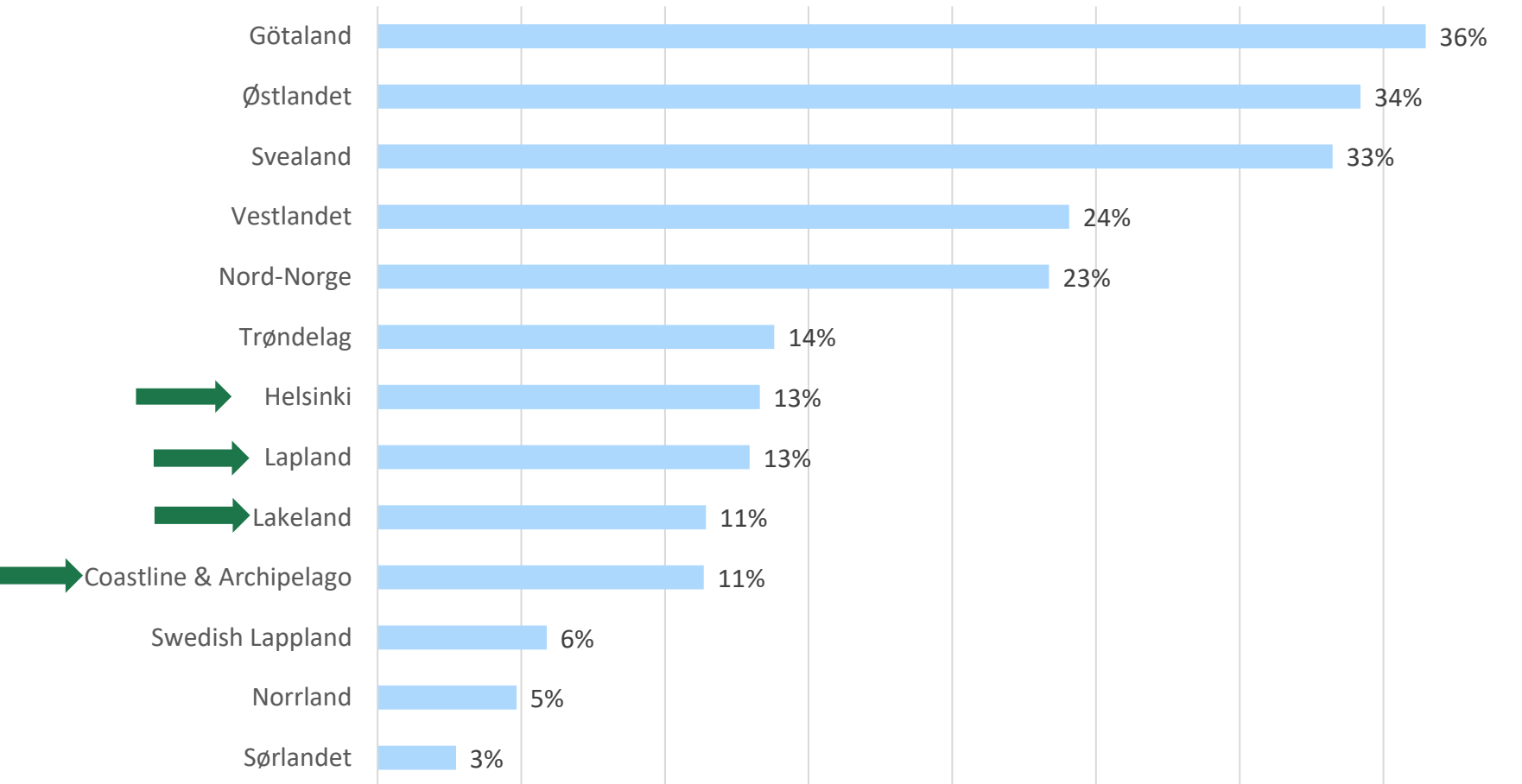
+19% more individual German tourists travelling Travemünde-Helsinki v.v. in **July 2022** compared to 2019

These figures confirm the recovery of the German tourism industry and the intelligent Finnlines marketing over the last years.

Even more positive is that the growth is higher in the low season months than in the Summer!

Göteborg is leading summer products hitlist of regions

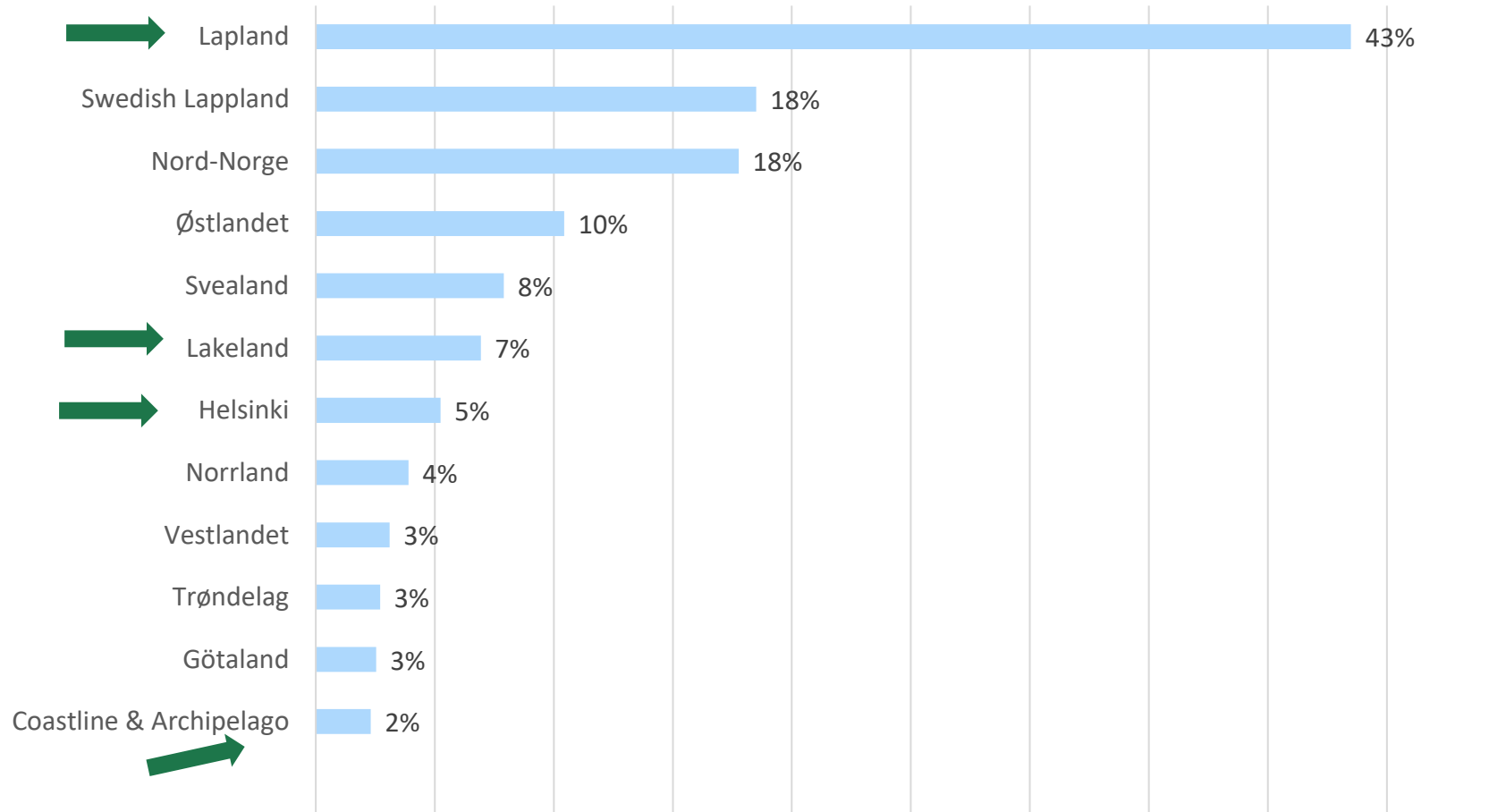
Number of products %, Source market: Germany, wo. Reseller, Summer 2022



- For Summer product offers, Swedish and Norwegian regions do really have an advantage compared to the Finnish regions
- Helsinki with 13% is number 1 from Finland
- Lapland and Lakeland as well as Coastline & Archipelago follow very close to each other
- They show a large product offering compared to Helsinki taking into account that overnights are much lower

Lapland is clearly leading the winter products' hitlist

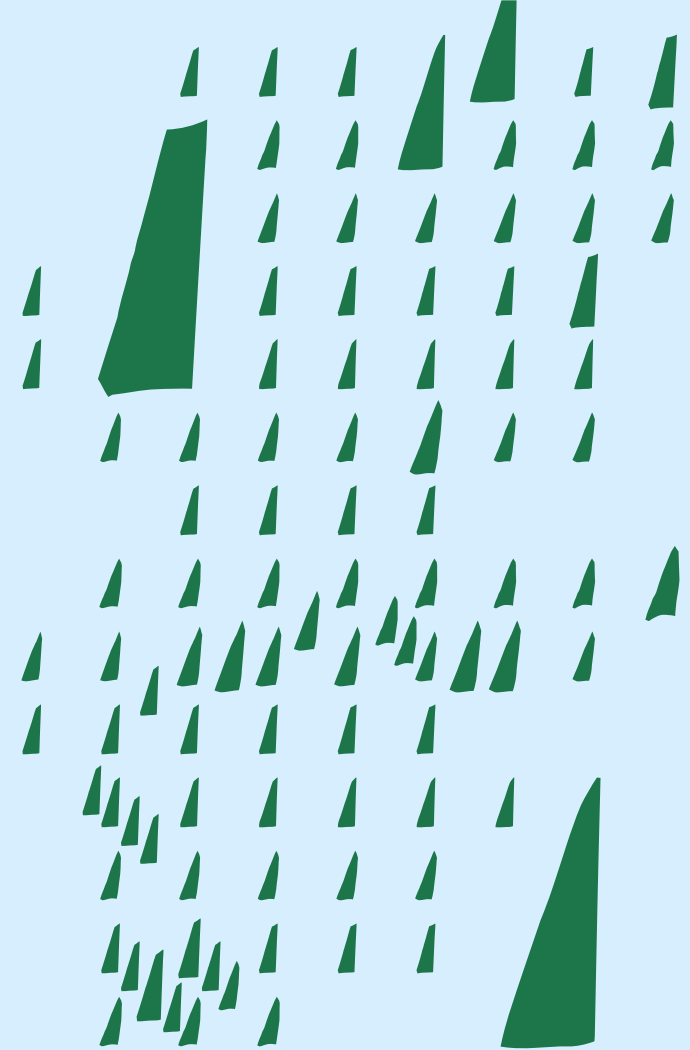
Number of products %, Source market: Germany, wo. Reseller, Winter 2021/22



- For Winter, Lapland and corresponding Lapland areas in Sweden and Norway are clearly dominating
- All other regions show a share of maximum 10%

Visit Finland B2B activities 2022

- Lot of B2B visibility at events, B2B media
- Piloting digital tools like Datahub at campaigns
- Supporting sustainable development



Joint promotions

- Airtrotter with Datahub content-API
- Finnland Rundreisen
- Outdoor Active
- Der Touristik, Feelgood Reisen, Hummel Reiseideen, Nordic Holidays, Wikinger Reisen, Troll Travel, Skandinavientrips, Baumeler Reisen, Lebenslust Touristik, fintouring



Finnish Lakeland – Unique nature experiences

- ✓ Route: Lahti – Koli – Laukaa – Tampere – Hämeenlinna
- ✓ 10 nights (customizable)
- ✓ Incl. accommodations, activities, flights and car rental.
- ✓ Price starting from € 1250,- p.p.
- ✓ *Trip is fully customizable!*

BOOK TRIP

Focus in accessibility at the market

Direct accessibility growing a lot during coming winter especially Lapland at winter joint promotions with

Finnair-AER, Eurowings, Lufthansa, KLM

TUI, Voigt Travel and Nordic .be & .nl



Op avontuur in Ruka

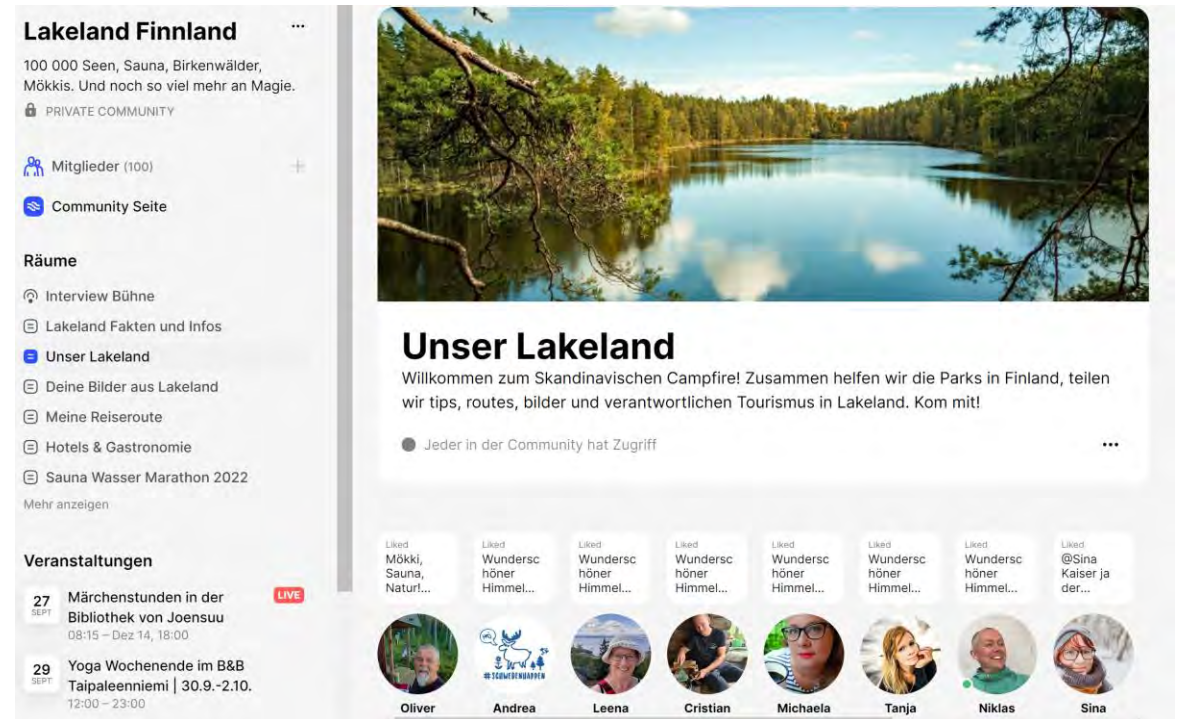
Finland staat natuurlijk bekend om haar adembenemende landschappen en prachtige, witte winters. Het landschap, de stilte, de mensen, de ruimte en de sfeer maken diepe indruk. De perfecte bestemming voor een sportieve of juist relaxte wintervakantie is het plaatsje Ruka, gelegen in het noorden van Finland. Het staat vooral bekend als wintersportplaats en daarnaast als startpunt voor de 80 kilometer lange wandelroute Karhunkierros.

Pilot Lakeland Community

@ Skandinavien Live gathers interested persons with influencers live streaming and writing about Lakeland behind the scenes.

We are launching the DataHub content at the community with the API

Link [here](#)





Sales events at markets 2022

Sales runs in 12 cities, covering German, Swiss, Belgian and Dutch markets

Workshops in Hamburg, Zurich, Amsterdam and Brussels

FAR workshop, fww counter days, Sternstunden, WebiWorkshops.. Presenting Finland live and online to ca. 2.000 travel trade contacts



Fam trips

Summer and autumn focus, ca. 100 buyers in total hosted

Excellent feedback: new tour operators, new products, new seasons!

Saunawassermarathon

Team Finland cooperation with Finnland Institute, DFG, Deutsch-Finnische Gesellschaft and Visit Tampere promoting the authentic Finnish sauna culture best experienced in Finland!

Mit Wasser aus Finnland

Hilpoltsteins Sauna-Botschafter: Einmal um den Rothsee für „Saunawasser-Marathon“

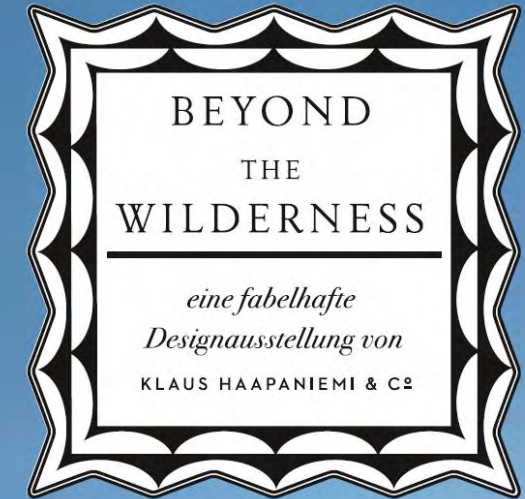
23.09.2022 | Stand 23.09.2022, 10:58 Uhr

AAA

Tobias Tschapka



**Team Finland cooperation
with Klaus Haapaniemi,
Embassy in Berlin, Iittala
and Helsinki Partners.**



2.7. – 25.9.2022

**NORDISCHE BOTSCHAFTEN
RAUCHSTR. 1, 10787 BERLIN**

www.finlandabroad.fi/deutschland
www.nordischebotschaften.org
[@finbotschaftde](https://twitter.com/finbotschaftde)
[#BeyondTheWilderness](https://hashtag.com/BeyondTheWilderness)

Market strategy Germany 2023

Visit Finland's Strategy 2021–2025



CHANGES IN THE OPERATIONAL ENVIRONMENT:

- Digitalisation and data
- Customer values and new sustainability requirements
- Covid-19 pandemic



ECONOMIC GROWTH

1. INCREASING DEMAND



SUSTAINABILITY

2. DEVELOPING SUSTAINABLE TRAVEL



COMPETITIVENESS

3. DEVELOPING DIGITAL ACCESSIBILITY / COMPETITIVENESS
4. LEADING WITH KNOWLEDGE
5. IMPACTFUL NETWORKS & PARTNERSHIPS



VISION

Finland is the leading sustainable travel destination. We add value to our society and customers and care for our unique environment. Finland is the first choice for mindful travellers.



Why this market?

German market has recovered from pandemic

- Opportunity to **increase year-round travel**
- German consumer trust is at low as, still **will for holiday travel high**
- **The green movement started in Germany** – sustainability is already affecting most of the consumption and awareness is growing
- **Nature and its experience** in an authentic environment rises in importance
- **Germans are interested** in Finnish culture and look for authentic experiences and encounters with locals

Finland selling points in the market

Germans have genuine interest towards Finns and Finland

- Experiences in **nature and culture** throughout Finland are of interest to Germans. **Live like a Finn**, the themes of happiness, the local food and the sauna culture - preferably guided
When the **northern lights**, the **midnight sun**, **unique accommodations** and **experiences** are added, we have Matthias Meikäläinen's dream vacation.
- **Lakeland - Land der Tausend Seen** is a strong USP for Finland in Germany. Touring and cottages remain top products since 70ies
- **Cooler summer**: in Finland you can do outdoor activities June-August! At European main destinations at Mediterranean this is not possible anymore.
- **Wellness and Sauna** is a well-established segment for Germans spending over 100 billion euros on Sauna and Wellness holiday services
- **Workation** might be our next USP with quick internet connections at nature locations which enables work and leisure combinations

Vision 2022-2024

Money first, volume second

- The year 2022: The market recovery begins. Re-installing the Suomi product on the market, focusing on sustainable growth. Introducing new digital tools to support production and sales
- 2023: Aim to normalize business by adapting products to the post-corona market. Active work to renew production and partner network on the market. The travel world is not back to normal, which creates a momentum for Finland as close by friendly EU destination.
- The year 2024: Business as usual! Optimizing sales and marketing for Finnish customers, driving sustainable development and developing accessibility

Increasing demand

YF TARGET

- Focus on **increasing summer demand**, especially in the areas where we have capacity and in August-September when Germans have their main summer holidays
- Additionally, launching the RUSKA "Indian Summer" and **promoting autumn as a cool outdoor travel season**.
- **B2B focus in increasing products at German market and Improving accessibility** by plane, by ferry and by land.
- **Strengthen all year tourism**: special interest, culture, design, sauna, food, events to bring more attention to Spring/Autumn to Finland.
- **Lot of potential** at the younger target group (25-50)
- Our audience is upmarket and well educated. **Lets offer upmarket products** like eco resorts to luxury specialists also in Germany

Developing sustainable travel

- **Improve communication:** We will share our vision of what "sustainable travel" is and communicate actively the hands-on examples of our sustainability work.
- Communicate **green transport options**, including **multi mobility options** into travel packages into accessibility and in destination with ferries, train, bikes and buses.
- Co-operations with relevant associations and partners, speaker opportunities to establish Visit Finland as an expert organization "**thought leadership**" in the area of sustainable travel.
- **Tactical sustainable travel campaigns** for B2B, promoting sustainable products

AUTHENTIC LIFESTYLE SEEKER

Customer segment DACH & Benelux

- **Main product type:** Touring, touring without own car
- **Interested in: Happiness – Live like a Finn:** Museums and events, Festivals and concerts, Cultural destinations, Design districts , Unique accommodations, Culture & Lifestyle, Food, Citybreak
Forests and lakes, Being in nature, Nature Experiences, Wellbeing & Sauna
- **Travel season:** Summer, Spring, Autumn
- **Top destination in Finland:** Helsinki, **Archipelago, Lakeland, Lapland**
- **Target groups:** Couples (29-49 yrs/DINKS), Families, Group of friends, Seniors (50+ generation/ WHOPS)
- **Other remarks:**
 - Touring with public transport is growing at markets and is attractive for younger audience
 - "Less" touring: 2-3 night stays 7-10 nights trips
 - Themed routings: food & walks, Architecture & special accommodations etc

NATURE EXPLORER

Customer segment DACH & Benelux

- **Main product type: Cottages & Resorts**
- **Interested in:**
 - Wellbeing & Sauna:** happiness, food, wellbeing services
 - Forests and lakes:** Nature Experiences, Midnight sun, Northern lights, National parks, Seaside views
- **Travel season: Summer, spring, autumn, Winter**
- **Top destination in Finland: Lapland, Lakeland, Archipelago**
- **Target groups:** Couples (29-49 yrs /DINKS), Group of friends
- **Other remarks (challenges, opportunities etc):**
 - This group wants to reconnect with nature in an easy way, soft adventures would suit them well.
 - Nature Explorers react to sustainability, especially lack of it.

Joint promotions D + NL

Tactical campaigns with partners

- Joint tactical campaigns are done to **increase sales** and demand of Finland as travel destination
- **Visibility and presence of the Finnish Travel Product** is critical at sales channels when image campaigns and PR work are done and drive consumers towards conversion. Content should be planned closer at market teams.
- Aim is to **steer market demand towards strategic goals**: sustainable long term all year business build up
- **Linking campaigns to accessibility** will become more important in the future

Finncines Joint Promotion

Focus on shoulder seasons, piloting winter and City breaks

Goals

Strategic

- push individual trips to “exotic” Finland – the happiest country in the world with a unique nature and adventure offer, directly linked to Germany with Finncines, the reliable, easy and sustainable travel partner

Operational

- generate the most possible bookings as early as possible
- explore further potential for trips outside the high season, while consolidating the Summer months
- develop marketing strategies together with local partners to raise the marketing effort for the destination

Thematic

- cherish the cold: Winter trips to Southern Finland with own car; easy driving, infrastructure; slow snow adventure
- My Helsinki cruise: pure nature, vibrant city life, delicious cuisine & long history meets contemporary design/architecture
- reconnect with nature: individual trips in (pre-/post-) Summer season; activities in nature; sauna and Finnish happiness

B2B sales events DACH & Benelux

On market

- **ITB Berlin 2023**
 - Finland stand with 30 partners as part of Nordic stand
- **Utrecht Fair 2023**
 - Trade Event with Nordics(tbc)
- **Sustainable Travel Finland x Good Travel Sales Event** 24.3.2023 Germany
- **Workshops** in 12.-14.9. 2023 (tbc) Germany & Switzerland, Netherlands & Belgium 14.-16.11.2023(tbc)
- **Sales run road shows**
 - South: Munich & Vienna 4.-5.10.2023
 - Lapland summer Sales Run Amsterdam-Frankfurt-Zürich 23.-25.5.2023, invitation only
- Other sales events by third parties
 - Grüne Woche, FAR, Futouris, Sternstunden and similar sales events towards retail
- **2023 events signups published 11.11.2022** except ITB, which is online.

ITB 2023 new concept!

Finland stand at Nordic village, hall 18 but different location.

7.-9.3.2023 travel trade only

Finland party at Embassy on the 8th March with ca. 150 buyers attending



Utrecht trade fair

11.1.2023

Visit Finland joins a trade day special with Nordic Countries at the Vakantiebeurs.

Possibility to participate with Visit Finland
[Link](#) to more information of the trade fair

Information Sara Snäll @ Visit Finland



Sustainable Travel Finland x Good Travel Sales Event

24th March 2023 in Frankfurt area Visit Finland invites STF accommodations and DMCs to meet 25 hand picked tour operators

How does this work?

1. **Accommodations:** Check the criteria [here](#), only STF label companies
2. 5 **DMC/ incomings** are selected when offering experiences for FIT & STF label
3. Target to pick 5 companies from each main region to join and **cover the entry fee for Good Travel** for 6 months
4. **Visit Finland invites** selected top hosted buyers.
5. Visit Finland **supports new production** with 2000 EUR joint promotional campaign with tour operators taking one or more products in their sales 2023
6. Mail sara.snall @ businessfinland.fi that you would like to join the event: the fee per participating company is **270 euro by 15th November**.

Good Travel criteria

Detailed information [here](#), example of Good Travel presentation [here](#)



B2B DACH & Benelux

Fam trips 2023

- **Fam trips pitch** is open for 2023!
- **4 group trips 5-10 buyers each**
- 3-5 days duration including weekend
- Preferred period May-September
 - Selection according to market segmentation
 - Remember increasing demand and sustainability
 - We expect the host to cover cost airport-airport (or harbor)
 - Visit Finland and host agree upon invitees and itinerary
 - Visit Finland invites, communicates
 - Visit Finland cover cost to destination
 - Fam trip feedback by Visit Finland

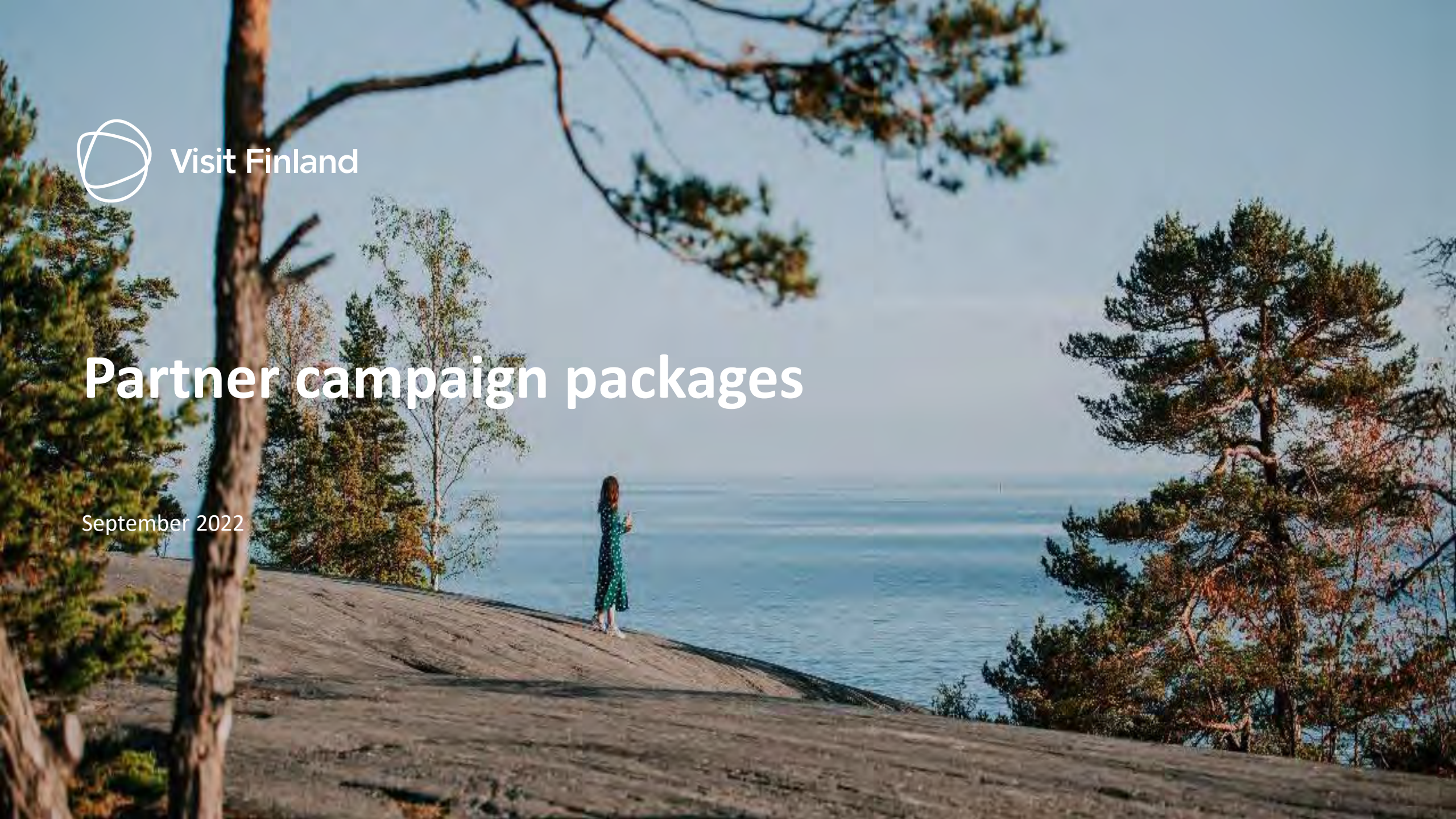
Contact: [jyrki.oksanen @ businessfinland.fi](mailto:jyrki.oksanen@businessfinland.fi)



Visit Finland

Partner campaign packages

September 2022



Find yourself in refreshing Finnish
summer

Germany 1: Find yourself in refreshing Finnish summer [MORE INFO](#)

Campaign details

Timing	March-May targeting summer and autumn
Focus	Comfort seekers looking for cottage & resort holidays

Audience

Target audience	Preliminary segment: Comfort seekers Secondary: Nature explorers, Authentic lifestyle seekers
Target market	Germany

Vision & objectives

Campaign objectives	To improve brand awareness (brand refresh) in Germany, increase interest and consideration of Finland as a travel destination for the summer and autumn. More tactical: enable travellers to choose amongst destinations and kickoff their planning and booking process.
---------------------	--

Distribution & KPI's

Activation	Landing page on VisitFinland.com website, banners, social media posts - to be further defined in the campaign activation plan.
Campaign KPI's	Awareness: reach, impressions, video views. Consideration: link clicks, sessions. Conversions: outbound clicks.

Main themes	Refreshing Finnish climate and nature. Specific themes to be ideated as a part of the creative process.	Tone of voice	Authentic, genuine, emotional	Areas of Finland to be covered	TBC
VF campaign partners	Min. 3, max. 8 partners. Minimum investment per partner 10 000 €.	Main competitors for summer and autumn seasons	Other Nordic countries		

**Find yourself in the pure
Finnish nature**

Germany 2: Find yourself in the pure Finnish nature

[MORE INFO](#)

Campaign details

Timing

April-July targeting late summer-autumn

Focus

Nature explorers touring Finland with own car or public transport

Audience

Target audience

Preliminary segment: Nature explorers Secondary: Nature wonder hunters, Activity enthusiasts

Target market

Germany

Vision & objectives

Campaign objectives

To improve brand awareness (brand refresh) in Germany, increase interest and consideration of Finland as a travel destination for the summer and autumn. More tactical: enable travellers to choose amongst destinations and kickoff their planning and booking process.

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Tone of voice

Authentic, genuine, emotional

Areas of Finland to be covered

TBC

VF campaign partners

Min. 3, max. 8 partners. Minimum investment per partner 10 000 €

Main competitors for summer and autumn seasons

Other nature destinations

PR and Media

Eevakaisa Mölsä

PR and Media Team Presentation

(Visit Finland in Helsinki & Global Communications experts in Frankfurt)



Eevakaisa Mölsä

PR & Media Manager at
Visit Finland



**Rainer Fornauf, Head
of GCE team**

Director Operations



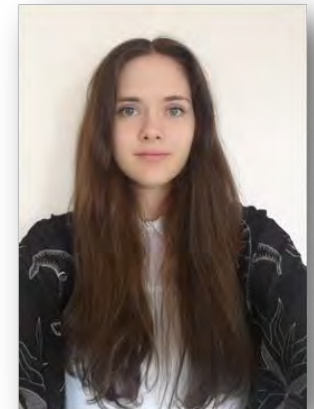
Marion Schön

Senior Account
Manager



Mirko Engel

Junior Account
Executive



Sabrina Zell

Junior Co-ordinator

Current media environment in Germany

Q2: Travel is recovering from most of our markets, also in Germany

- Recovery after the pandemic has started and we have resumed a normal level of activities, including bringing media to Finland. This will help us in achieving our targets, as prominence and thus the overall visibility for Finnish travel is always higher in stories that are the result of media trips.
- The war in Ukraine did not have a significant impact on our PR efforts to attract travelers to Finland. To date, there hasn't been news that would indicate that travelling to Finland would not be safe.
- The current economic situation and the prognosis towards the end of the year are affecting the travel expenditure globally. Factors such as fuel and food prices, inflation, electricity, as well as chaotic international airports are reducing the pace of recovery.

PR & Media activities in Germany in 2022

Goal: To raise awareness for Finland as a sustainable travel destination

- We have resumed normal level in our activities; thus, we expect improved visibility and broader coverage for the year.
- The media visit flow has been steady from Germany even though the international competition after the pandemic has been fierce.
 - The media (Tier 1) is our main target but as well as numerous regional newspapers and influencers.
- We have hosted up to **30** different media and prepared up to **25** press releases and pitches in 2022.
- TV and radio create the best visibility, and we have had the pleasure of hosting both to promote shoulder season this year.
- Most of the TV coverage is yet to come: different TV shows has visited all regions in Finland.

After the pandemic, the goal has been re-building visibility in traditional media.

How we generate visibility in Germany

Goal: To raise awareness for Finland as a sustainable travel destination

- **We pitch interesting stories about Finland as a travel destination to media**
 - Through press releases (traditional ones such as new openings, listicles "Top 5")
 - Newsletters
 - Protagonist interview press releases – travel business is a much about people and their stories
 - For example hotel and mushroom queen Saimi Hoyer, Sauna healer Maaria, Ylitalon Poromatkaailu, Northern Light expert Thomas Kast
- **We organize press trips to media and influencers to showcase the destination**
 - Media wants to tell real stories by people and experience themselves

What interests the German media:

- Outdoors/Nature
- Wellness/Sauna
- Culture
- Design

Annual Target | Visit Finland

KPI	Target 2022	Result H1
Number of Stories Produced	2,000	1079
Visibility Score	55%	61%
Brand Building Effect	5.0 billion	1.8 billion
Publicity Value	20 million euros	6 million euros
Customer Feedback for Tours and Events	4.7	4.9
PR Agency ROI	40x	TBA

Observations after first 6 months

- Number of Stories produced is well on track.
- The quality of publicity measured by average Visibility Score rose to 63% in Q2 which is the highest registered during the past years.
- Brand Building Effect and Publicity Value – These indicators are yet to grow towards the end of the year.
 - **NB!** The results are currently missing a significant share of global coverage.
- Customer feedback has been excellent from the press trips organized in the first half of the year.
- PR Agency ROI is only calculated for the whole year.

1.The average Visibility score talks about the attention e.g. an article can be expected to get

2.Brand Building Effect is an estimate of the number of media consumers that have seen the article

PR and Media in Germany in 2022 in results

- The DACH region accounted for the largest amount of media publicity of the all VF monitored countries:
 - **40 % of all coverage in Q1-Q2 was published in Germany** (all resulted of VF 's proactive PR and media work).
- January-August in total **437** hits (most for Lapland 178, Lakeland 140, Finland in general 52, Helsinki 49 and Archipelago and Cost 30)
- Most of them appeared in Tier 2 with brand Building effect 234 milj.
- Average tone 2.90, average visibility score 64 %
- Main themes: outdoor, wellness and culture.
- Season: **summer 271**, winter 105, spring 23, autumn 6
- Overall satisfaction of media trips 4.7

- 1.The average Visibility score talks about the attention e.g. an article can be expected to get
- 2.Brand Building Effect is an estimate of the number of media consumers that have seen the article

Examples of coverage

***New Art Sauna at Serlachius Museum press release was published up to 100 magazines. At the opening day, there were German travelers visiting the place, since they got the tip from the local media!



Abfall-Bier und Schanzen-Bad in Lahti

24. Januar 2022 Mortimer Europa, Finnland



Media trip: Brigitte (6 pages)

Value of 36 000 e

Press release: Suddeutsche Zeitung

Value of 30 000 e

Press release: Mortimer

Value of 13 874 0 e

Press trip: General Anzeiger

Value of 25 000 e

PR & Media work in 2023

Goal: Bold PR plans to raise awareness for Finland as a sustainable travel destination

- **Improve awareness what Finland has to offer.** Cross-media strategy!
- **Influencer co-operation (new strategy):** To reach more younger audiences (including TIKTOK), travelling with a partner (trending).
- **To put special focus on content that stands out.**
 - In 2023 we want to create more edgy plan for PR content and trips: "Finland as a "new", interesting, cool sustainable travel destination in the Nordics".
 - The braver plan means we will design our press trips more carefully for specific target group and set them a specific theme supporting stronger, more creative outcome in media.
 - More, meaningful influencer co-operating addressing target groups (Finland trending in photos, also niche topics such as biking)
- **Seasons:** Year-round but stronger input on summer and autumn (ruska is trending!)
- **Topics:** Nature/outdoor, wellbeing, sauna, culture and design (protagonists for these topics)
 - Germans also love quirky side of Finland (swamp soccer, air guitar, reindeer yoga etc.)

Your content ideas for 2023

Flinga exercise 10 min

<https://flinga.fi/s/F652YQU>



Germany & Netherlands information online

[Saksa - Business Finland](#) Market information, signups and more and more

[Alankomaat](#) updated by the end of October 2022