



## Kainuun maakuntafoorumi

## 21.4.2021



## First response: panic





## Matkatoimistojen kv myynti pysähdyksissä jo 13 kk









## Suomi on sulkenut rajat muille



Europäische Länder: Alle Reisewarnungen und ... 🔒



X

Ausreisekontrollen durch, raten jedoch den Reisenden sich mit den Einreisebestimmungen des Ziellandes sowie der Transitländer vertraut zu machen.

Seachioaden. Die eachidenen orenzoenorden führen kein

### Finnland: Grenzen dicht

Meistgelesen

Einreisen So funktioniert der grüne Impfpass für Auslandsreisen

Reisen möglich Bereits 40 Länder sind wieder ohne Reisewarnung

Europäische Länder 🗩 (2) Alle Reisewarnungen und Einreisen auf einen Blick

Einreisen in Corona-Zeiten So gelangt man in die wichtigsten Fernreiseziele

Trotz Corona In diese Länder reisen Geimpfte frei ein

Vor nicht notwendigen, touristischen Reisen in die Regionen Uusimaa (mit Großraum Helsinki), Kymenlaasko, Varsinais-Suomi, Etelä-Karjala, Päijät-Häme und Pirkanmaa wird gewarnt.

Von nicht notwendigen, touristischen Reisen in die übrigen Landesteile wird wegen der Grenzschließung derzeit abgeraten.

Die Covid-19-Neuinfektionen sind regional unterschiedlich. Schwerpunkte sind der Großraum Helsinki (Region Uusimaa), die Region Varsinais-Suomi, Etelä-Karjala, Kymenlaasko, Päijät-Häme und Pirkanmaa. In diesen Regionen überschreitet bzw. überschritt zuletzt die Inzidenz 50 Fälle pro 100.000 Einwohner auf sieben Tage, weshalb diese als Risikogebiete eingestuft wurden.

Einreise: Die Modalitäten einer Einreise nach Finnland hängen vom Infektionsgeschehen im Herkunftsland ab, das den epidemiologischen Grenzwert von 25 Neuinfektionen pro 100.000 Personen innerhalb eines Zeitraums von 14 Tagen nicht überschreiten darf. Die finnischen Behörden überprüfen diesen Wert regelmäßig. Der Grenzwert ist für Deutschland deutlich überschritten.



## IATA Travel pass/ matkailun avaamisen hybridiratkaisu



"IATA:n digipassilla" voidaan matkustajien ja kenttähenkilökunnan kontakteja vähentää korona-aikana.

corona Qatar Airways rokotustodistus

### Qatar Airways pilotoi IATA:n Travel Pass -rokotustodistusta



## Ratkaisu on tekeillä

Justizkommissar Reynders

### Grüner Impfpass der EU soll bis Ende Juni kommen

von dpa Dienstag, 13. April 2021





EU-Justizkommissar Didier Reynders treibt das Impfzertifikat voran.

In legen Konzept für

er grüne Impfpass für

sind wieder ohne

Rechtzeitig zu den Sommerferien in Deutschland soll das einheitliche Covid-Zertifikat für einfacheres Reisen in Europa Ende Juni startklar sein. "Natürlich möchten wir vor dem Sommer bereit sein", sagte EU-

### Alkaako matkailu kesäkuussa? STM: EU:n koronapassiin riittää yksi rokotus – ja passin voi saada jopa ilman rokotusta

9.4.2021 16:42 | päivitetty 9.4.2021 16:42

KORONAVIRUS TERVEYDENHUOLTO TURVALLISUUS MATKAILU

EU:n komission valmistelussa oleva vihreä todistus, jota on kutsuttu myös rokotuspassiksi, mahdollistaisi liikkumisen Euroopan sisällä. Todistus on tarkoitus ottaa käyttöön kesäkuussa.







#### **Uusimmat**



### Monta asiaa ratkaistavana matkailun avaamiseksi



KRISTIINA HIETASAARI

Senior Director, Visit Finland kristiina hietasaari (at) businessfinland fi



### TOIVEENA SELKEÄT LINJAUKSET

Matkailu on siis saatava käynnistymään mahdollisimman pian. Terveysturvallisen matkailun mahdollistamiseksi matkailutoimiala toivoo hallitukselta mahdollisimman pian päätöksiä ja selkeitä linjauksia seuraavista aiheista:

- Vahvistus siitä, että Suomi on mukana Euroopan yhteisissä linjauksissa Schengen-alueen matkailun ehdoista
- Selkeät päivämäärät, mistä alkaen Suomeen matkustaminen on mahdollista. Pelkkä maininta työmatkustuksesta ei riitä, on syytä selkeästi ottaa kantaa myös vapaa-ajan matkustukseen.
- Päätökset siitä, että kaikki matkailijat matkan motiivista (työmatkustus tai vapaa-ajan matkailu) riippumatta pääsevät maahan esittäessään todistuksen joko saadusta koronavirusrokotuksesta, sairastetusta -taudista tai negatiivisesta -testituloksesta. Kaikki vaatimukset selkeästi linjattuna.
- Kaikki matkustamiseen liittyvät rajoitukset tulee viestiä siten, että tulkinnanvaraa ei jää. Selvät toimintatavat mahdollistavat matkustajien informoinnin paremmin ja edesauttavat Suomeen suuntautuvien matkojen varaamista.
- Terveiksi todettuja matkailijoita ei aseteta Suomessa karanteeniin
- Myös pikatestit tulee hyväksyä

Miten ja millä aikataululla Suomessa otetaan EU:n rokotuspassi/todistus käyttöön:

- Riittääkö yksi rokotus todistuksen saamiseksi tai todistuksen hyväksymiseksi?
- Hyväksytäänkö Euroopan lääkeviraston hyväksymien rokotusten lisäksi esim. Sputnik-rokotus? Tämä tieto
  on tärkeä mm. Venäjältä Suomeen suuntautuvan matkailun avaamiseksi.
- Mitä rajoitteita jää voimaan rokotuspassista huolimatta?
- Miten EU-alueen ulkopuolisista maista (esim. Iso-Britannia, Yhdysvallat) saapuvien matkustajien matkustus mahdollistuu? Onko EU-todistuksen säännökset tulkittavissa myös näiden tärkeiden matkustuksen lähdemaiden matkustukseen?

Visit Finland on yhteydessä päättäjiin ja toivoo heiltä vastauksia näihin kysymyksiin sekä päätöksiä ja linjauksia terveysturvallisen vapaa-ajan matkailun mahdollistamisesta mahdollisimman pian.



## Näkymät 2021 loppuun

#### amadeus

Building a Pathway to Recovery: Finland

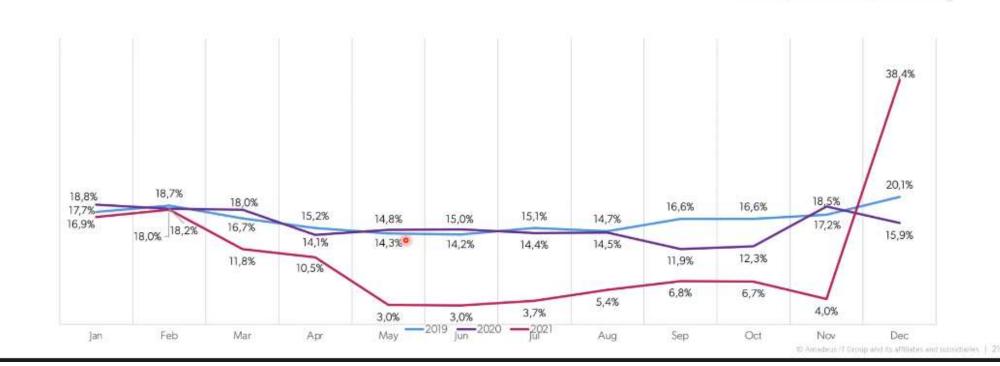
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- Demand Analysis: MARKET LEVEL

### Performance vs previous years

Market share by Travel Date 2019-2021 FI in Bookings between: FI, DK, IS, NO, SE This graph monitors the evolution of the relative booking market share each destination holds within the global bookings to this destination group. This allows to benchmark against competitors and evaluate if there has been changes in the traveler destination preferences- **How popular is my destination**?

Bookings made until April 16th



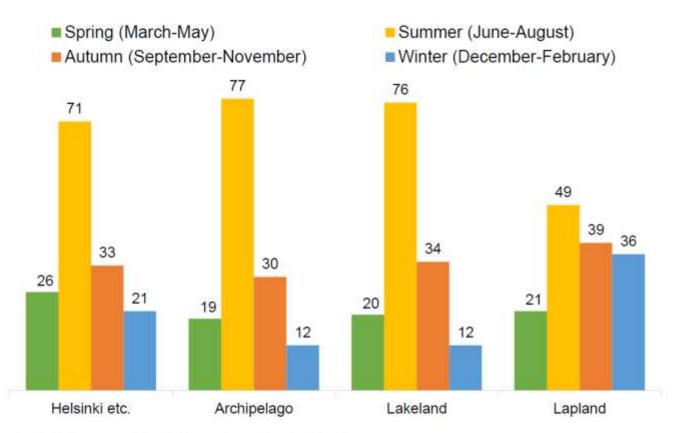
## Mikä muuttuu pandemian seurauksena?

- Työmatkailu muuttuu: matkat vähenevät, pitenevät, hybridi on standardi tapahtumissa
- Työn ja vapaa-ajan yhdistyminen trendinä jo ennen nyt lisääntyy: kannattaa innovoida uusia tuotteita tähän. Ryhmätyötä ja yksittäisiä perheitä ja pareja: avain ympärivuotisen kaupan lisäämiseen?
- Digitaalinen disruptio on kiihtynyt koko kv matkailun arvoketjussa
- Alustatalous valtaa nurkkaa matkailussa: Booking & Expedian oligopoli dominoi OTA-kanavissa
- Terveysturvallinen lomailu
- Luonto kiinnostaa!
- Kestävän matkailun tuleminen?
- Liquid services: tarkoittaa äärimmäisen joustavaa saatavuutta palveluissa: haaste alalle.



## Syksy oon uusi musta!

### Preferred Season for Finnish regions: Mostly summer, Lapland with the least seasonality





- In a last question in this online survey, we asked the potential travellers to the four Finnish regions at what time of the year they would like to travel to the respective region. (Multiple answers were allowed)
- The results for Archipelago and Lakeland are very similar, with a strong preference for the summer.
- » For Helsinki, also the summer dominates, but spring and winter have higher figures than in Lakeland and Archipelago.
- » For Lapland the preferred seasons are a bit more diverse, with summer being strongest, but autumn and winter following quite closely.



Question: In which season would you like to spend your holiday in [...] ? in %

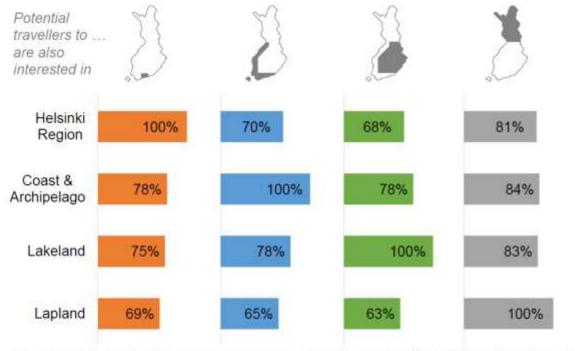
Basis: Potential travellers to Helsinki etc. (n=641), Archipelago (n=681), Lakeland (n=598), Lapland (n=521) in the German-speaking population aged 14-75 years, source: RA online 11/2020

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## Kiertomatkailu säilyy tärkeänä

## Interest to travel to Finnish Regions: Heavy overlapping of the potential guests of the Finnish regions



"Are you <u>almost definitely</u> planning to go on a holiday to one of these countries in the next three years? (2021-2023) And which of these countries would you <u>generally consider</u> as a holiday destination in the next three years?" Basis. German/German-speaking population 14+ years in Germany, Source: Reiseanalyse 2021



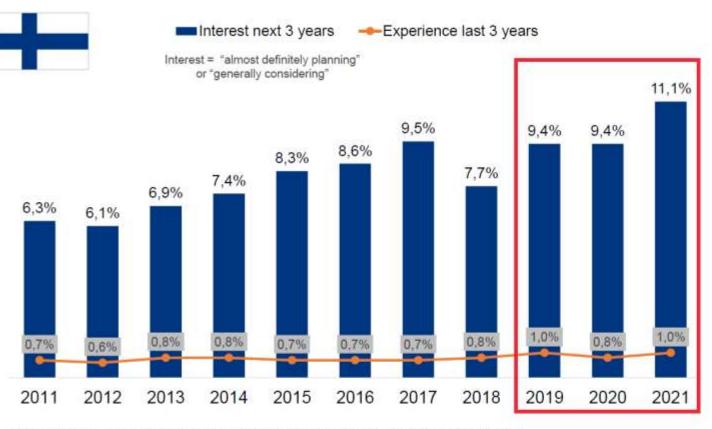
- There is heavy overlapping between the interest for the four Finnish regions.
- » E.g. of 100 persons interested to travel to the Helsinki Region, 78 are also interested in travelling to Coast & Archipelago, 75 to Lakeland and 69 to Lapland.
- This means on the one hand side, that the destinations can be well combined in product offers, e.g. when developing round-trip itineraries.
- On the down-side this may mean that the respondents may not have a clear image of each region, but are rather thinking of Finland as a whole.





## Suomen potentiaali tuplaantui 10 vuodessa

Interest to travel to FINLAND: Increased share of potential travellers, stability of actual demand





- » Within the last decade the share of Germans "almost definitely planning" or "generally considering" Finland as a holiday destination increased from 6.3% to 11.1%
- The actual demand has seen a solid growth to 1.0% since 2017 after a period of stability on a level of around 0.7% during the years 2009 to 20017.
- The 11.1% potential guests to Finland are divided in 1.0% "hard" potential ("almost definitely planning") and 10.1% "soft" potential ("generally considering").





"In which of these countries have you spent a holiday during the last three years (that is 2018, 2019 or 2020)?"

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2021-2023) And which of these countries would you generally consider as a holiday destination in the next three years?" Basis: German-speaking population 14+ years in Germany, Source: Reiseanalyse 2021

## Uusi luontomatkailu 1

### **BIKEPACKING 101**

### START YOUR JOURNEY HERE

● → O → O → O WHAT HOW WHERE WHEN

Simply put, bikepacking is the synthesis of all-terrain cycling and self-supported backpacking. It evokes the freedom of multi-day backcountry hiking and travel off the beaten path, but with the range and thrill of riding a nimble bicycle. It's about venturing further into places less traveled, both near and far, via singletrack trails, gravel, and forgotten dirt roads, carrying the essential gear, and not much more.



## Uusi luontomatkailu 2



### GET OFF-ROAD WITH EAT SLEEP CYCLE

Gravel is the next big thing in cycling and it's no surprise why. Gravel roads open up new landscapes free of traffic, offering adventure and the promise of escape. Discover new places you didn't know existed, or rediscover a place you thought you already knew.

Come and explore the Pirinexus trail taking in the Pyrenees, Costa Brava & Girona region, or ride Trans Alps & experience the stunning Sella Ronda route in the Italian Dolomites, or why not discover the best gravel trails from the medieval city centre of Girona?

Whether you're looking for a self-guided bikepacking adventure or a supported tour, just ask us for more information.



# 1. Key information & our position in the market



## SWOT "Finland's position as a travel destination"

Weaknesses:	Strength:
<ul> <li>Relatively unknown as travel destination</li> <li>Location feels distant</li> <li>Consumers have an impression that Finland is very expensive</li> <li>Finland seen to have cold and wet weather</li> <li>German tourism market is very competitive, therefore hard to get the marketing messages to a wider audience</li> <li>Too much "only nature" makes Finland unattractive for a wider audience</li> <li>Seasonal weaknesses:</li> </ul>	<ul> <li>nature:, architecture (Alvar Aalto), Mökki-culture, wooden houses, villages and cities. finnish art deco style</li> <li>cultural locations (UNESCO, Suomenlinna, opera festival), manor house-hotels)</li> <li>arctic circle, arctic elements, reindeers, sami culture</li> <li>safety - distances are easy to be kept</li> <li>people &amp; culture: authentic sauna culture, events: Jazz, Tango, Sibelius</li> <li>overland accessibility: by car, coach and train</li> </ul>
August + Spring – unstable weather Threats:	Opportunities:
<ul> <li>International travel is crisis due to the Covid 19 pandemic</li> <li>Accessibility is not clear during and after the crises</li> <li>Transparency in how to travel safe, lack of communication on travel measures and safety measures (though the measures are good)</li> <li>Finnish suppliers' operational safety during and after the crises</li> <li>Reliability of partners in markets and sales channels</li> <li>Financial crisis as result of the pandemic, might decrease demand for travel</li> <li>Fear and distrust of authorities, a general trend in the world and in Germany, that might cause confusion at the market</li> </ul>	STF, everyman's right and responsibilities Making nature infrastructure easier achievable Good service and authentic and tasty food communicating and traveling easy: payments, Eurozone, cash free - safe travel Train travel is safe, affordable and on high level Digitalisation for finding, buying informing consumers better marketing experiences: for instance: we have a different nature understanding-what is interesting for the visitor? Younger audience will travel first: more active content Coast and Archipelago and regional culture - Swedish



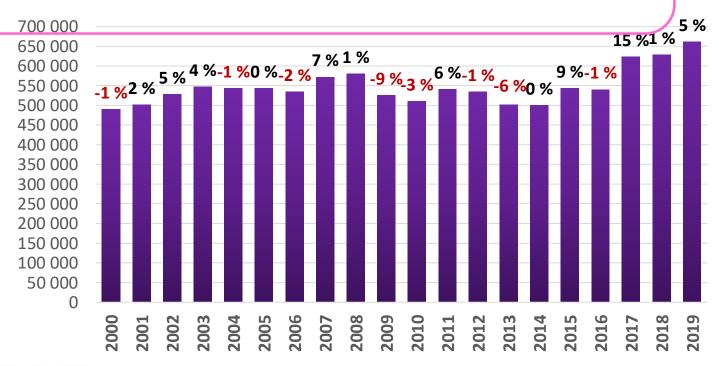
## German overnights in Finland (pre-covid19)

### In 2019:

- Population: 83 million
- Outbound travel from Germany: 113 million arrivals to all destinations in 2019 (+2% from 2018)
- Travel Expenditure (total outbound travel from Germany): 96 billion EUR
- Europe's share of German's outbound travel: 88%

/isit Finlandand

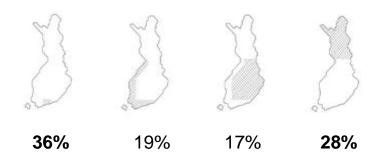
• Finland's share of total German outbound travel: 0.4%



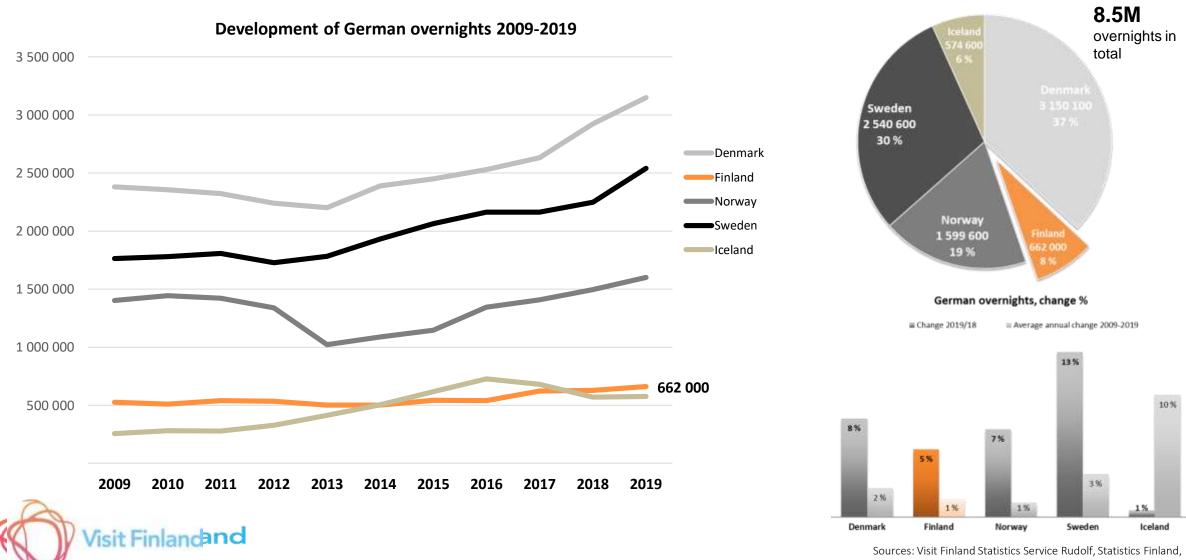
### Year 2019

2<sup>nd</sup> in country rankings
 with a 9% share of foreign overnights
 Average change 2000-2019: +2%
 Change 2019 compared to 2000: +35%

### Share of overnights by regions 2019



## Germany: Yearly overnights in the Nordic countries



Nordic countries' share of German overnights 2019

Statistics Denmark, Statistics Norway, Statistics Sweden and Statistics Iceland

### German overnights in Finland & in the Nordics

400 000

200 000

2010

2011

2012

2013

2014

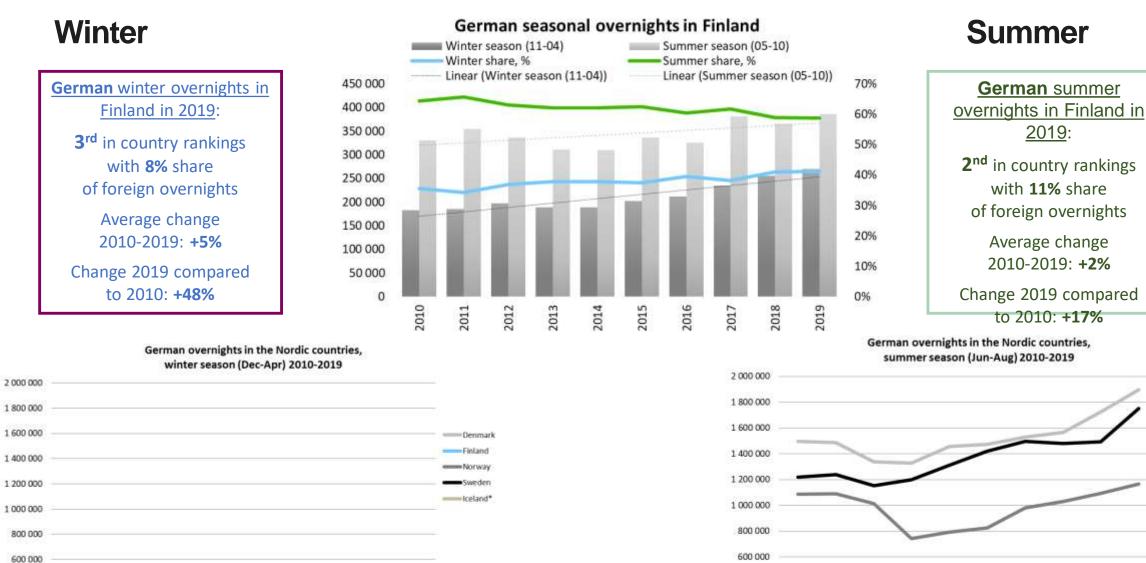
2015

2016

2017

2018

2019





236 400

400 000

200 000

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

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

\*) incl. hotels only

270 300

Denmark

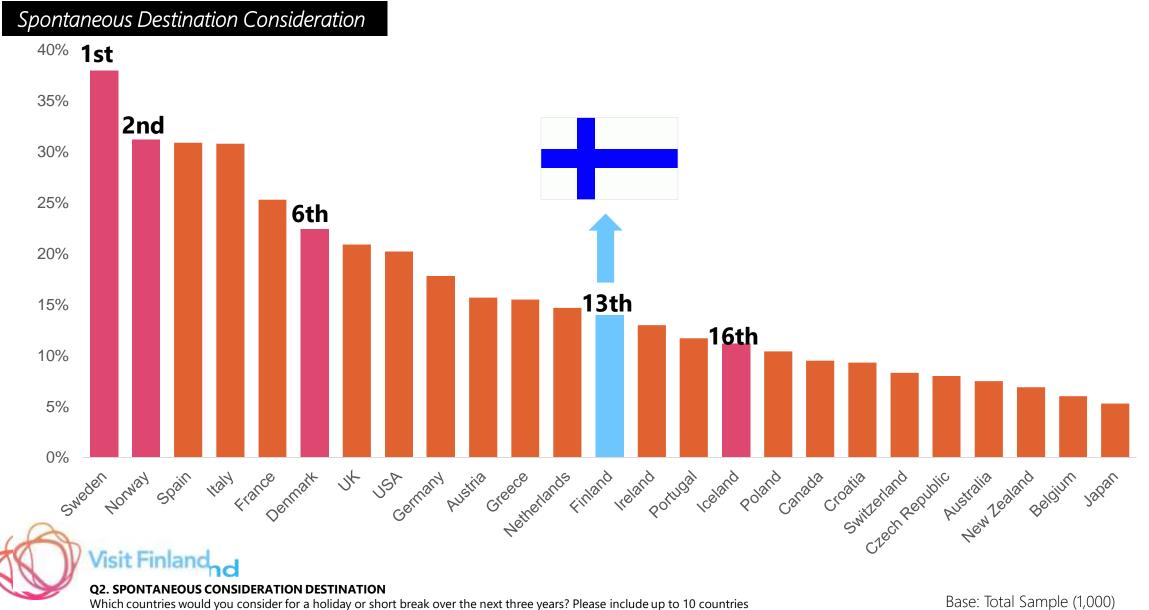
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-lceland\*

Finland

Norway

When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland lags behind Sweden, Norway and Denmark



### Germans strongly associate Finland with its nature landscapes and features (especially the lakes). Helsinki comes to mind quite well too



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.

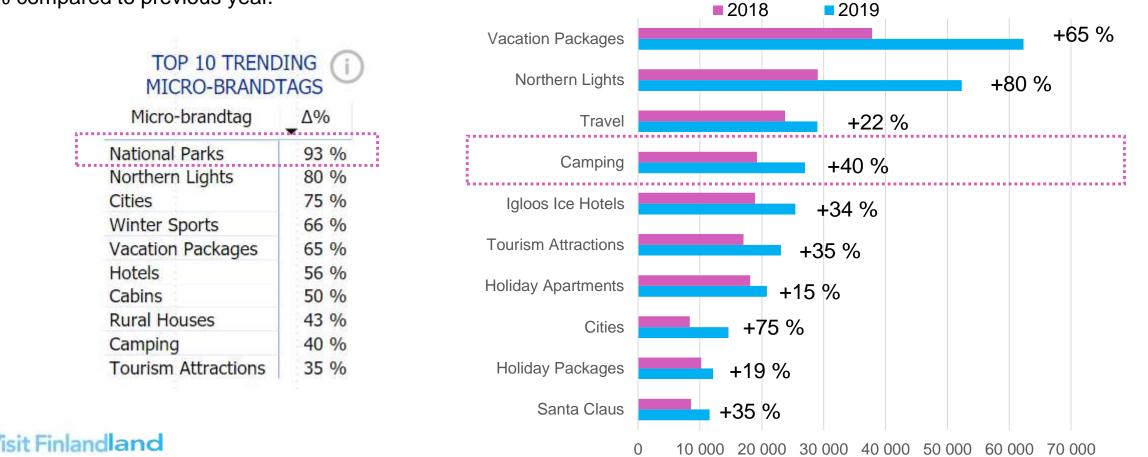
Christmas.

### Germany

No. 3 in ranking in absolute numbers.

455 300 travel-related Internet searches concerning Finland.

+38 % compared to previous year.



**Top Micro-brandtags** 



## 4. DACH market strategy



## VISIT FINLAND MARKETING STRATEGY 2021-2023

CONTINUE TO STRENGHTEN AND MAINTAIN FINLAND'S COUNTRY IMAGE AS ALL YEAR ROUND TRAVEL DESTINATION ATTRACT, PROMOTE AND ACTIVATE SAFE TRAVEL TO FINLAND –WE HAVE ROOM TO ROAM INCREASE AWARENESS OF FINLAND AS A SUSTAINABLE TRAVEL DESTINATION

### **Strengthen the strengths**

### **OUR FOCUS**

- Innovative promotion of Finland's country image → awareness and improved image among target group
- Communicate safe travel to Finland as soon as it is possible
- Identify and focus marketing activities on higher value customers  $\rightarrow$  increase the length of stay and yield across all regions
- Sustainability will underpin every aspect of our marketing initiatives (focus on customer, authenticity, adding value)

### **MARKETING CONCEPT**

• Help people find their calm and happiness



### Strengthen the strengths

## Visit Finland's Unique Selling Points

Find your happiness live like a Finn Easy access to forests reconnect with nature To know Sauna is to know Finland Santa Claus - the ambassador of goodwill from Finland

The land of a thousand lakes

Responsible travel is freedom to travel

PLEASE CHOOSE THOSE THAT RESONATE THE BEST IN YOUR MARKET AND ANALYSE WHY.

## **Chosen UPS's & strengths**

### Image marketing and communication

- Our former "Slow Finland" message is well continued by "Find your happiness and calm" message.
- For "Responsible travel" we already have a lot of tactical content and we are mainly concentrating on partners who also have the same values. Freedom reflects everymans rights and responsibilities.

### Selling points on German market

- Easy access to forest Finlands USP as we can offer this everywhere, not only in countryside but also in cities. We are always close to nature. As we don't have any Eiffel tours, close to nature / forest is absolutely a USP
- Sauna Sauna should be a must on every tour to Finland, no matter where you go, city Saunas, cottage Saunas....
- Lakes in Finland you have space on the lakes: make cruises, go to islands, have your own lakeshore with your mökki, boat, SUP, sunset, palju etc



## Lakeland

Lakeland USPs	Travel Trend	Media interest	
Land of a thousands of lakes	People are keen on authentic and unique experiences in the	Active holidays and nature experience	
Finnish national landscape	middle of nature with room to roam	Active holidays and nature experience	
To know sauna is to know Finland	Wellbeing & mindfulness	Wellness and mindfulness	
Have a holiday like Finns do	People are keen on being "isolated in the nature" (mobile cocooning, workation), combined with a sustainable approach, i.e. back to basics as the new normal	Authentic and unusual experiences	





## VISIT FINLAND MARKETING PLAN 2021





## Visit Finland campaigns DACH 2021

#### • IMAGE CAMPAIGN

- Global image campaign - cool, creative, contrast and credible. Building awareness. Strenghten the strenghts (USP's) + Storytelling

- Always starting with PR activated approach Educational Marketing: Promoting Safe Travel to Finland (e.g some, media, blogs, influencers etc)

### • Tactical campaigns

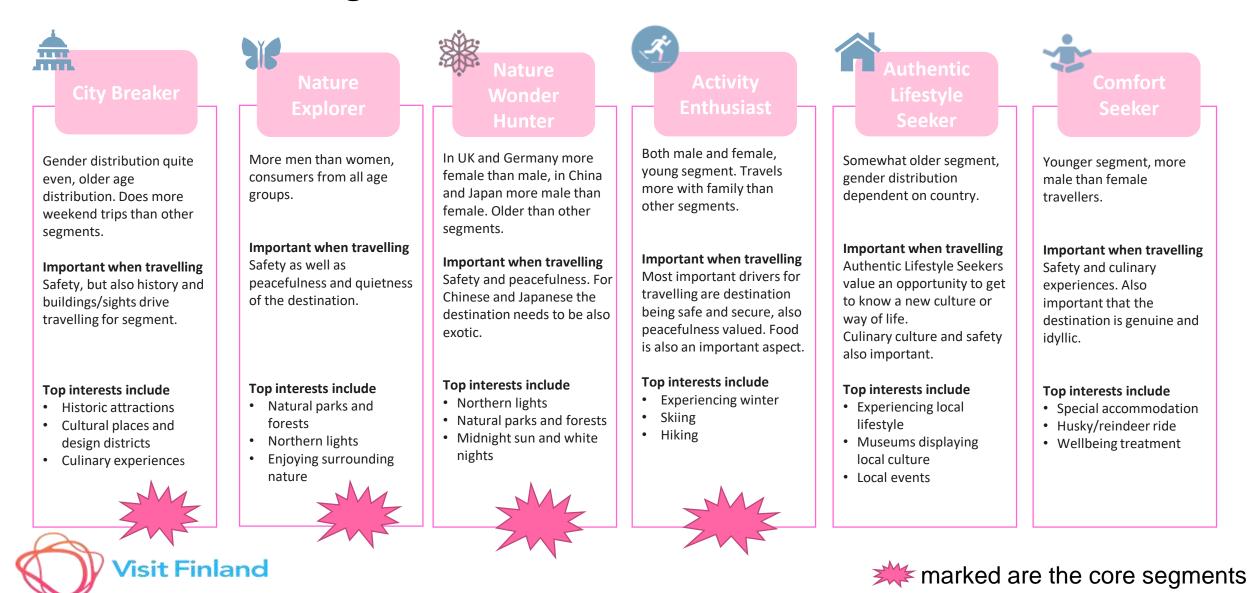
- Lift up Finnish offering in sales channels, Segmented content, Seasonality highlighted, Strong CTA for immediate bookings

### • OTA campaigns

- Segmented content, Regional offering based on segments
- Tactical approach, landing page and redirecting, Engaging regional partners
- JOINT PROMOTIONS
  - Market Specific content marketing campaigns with partners
  - Promoting Finland for sales channels and consumers



## The large group of Modern Humanists is divided into segments based on their travel motives



### **Target segments & products**

Traveller segment	Type of travel	Main Product category (pushed)	Secondary product categories (often combined)	Target group	Key Products example
Nature explorer & (Nature wonder hunter)	Touring / Cottagesℜ sorts	Outdoor and sports, nature experiences,	Wellbeing & Sauna, Food, Culture & Lifestyle, High end & Luxury experiences	Couples (young couples/ older couples/DINKS, Young travelers (Millenials, young FITs)	Secret Escapes
Authentic Lifestyle Seeker & (Activity enthousiasts)	Touring/ Cottages&Reso rts	Outdoor and sports, nature experiences,	Wellbeing & Sauna, Food	Couples (young couples/ older couples/DINKS, Young travelers (Millenials, young FITs)	Travelzoo
City breakers	Short Holidays	Culture & Lifestyle, Food	Wellbeing & Sauna, Family experiences	Couples (young couples/ older couples/DINKS, Young travelers (Millenials,	Urlaubsguru

## **OTA-Campaigns – Partner offers**





## secret escapes

### outdooractive







## Why OTA-campaigns

### Traveling is not possible:

Finland has perfect conditions in terms of traveling to, when possible again Image campaigns to tickle the desire to travel to finland when possible again

### When traveling is possible again:

Finland is a trustworthy country with much **space**, endless, wide woods, lakes Users of those three OTAs feel that they get really special offers they would not get anywere else

Focus can be either late summer/winter

Reporting and monitoring is easy







## What all our OTAs offer:

- **Newsletter:** stand alone and/or bannerbased – high reach – good opening rates
- **Banners** and bundles and guaranteed traffic
- Social Media: with Stories and posts
- Reporting after every week
- Call to action and sales for products



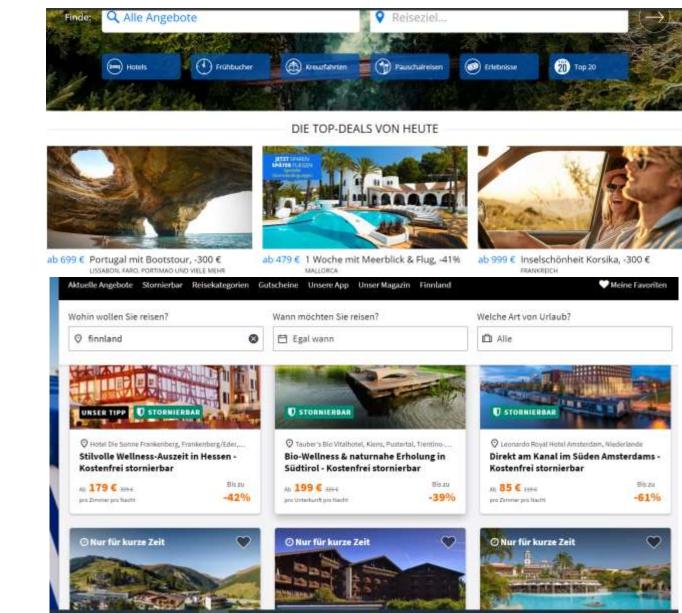






## How to join campaign/ s

- Which campaign(s) you are interested in
- How much budget you have for the campaign(s)
- Which products you would like to offer:
- special hotels, special activities, glamping etc.
- More information and how to join ulla.sperling@businessfinland.fi





## **Outdooractive.com**

UBERSICHT ORTE & REGIONEN

HIGHLIGHIS

### **Campaign overview**

Duration: 4,5 months 15.8.2021 - 31.12.202 25 000 page views for campaign pages (+ extra visibility per part

#### **Campaign landing pages**

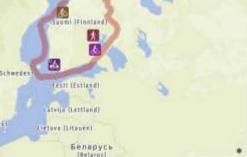
- Finland landing page
  - "Find your happiness Live like a Finn"
  - Edited separately for autumn & winter
- 4 Regional landing pages
  - Lakeland
  - Lapland
  - Coast & Archipelago
  - Helsinki Region
- Thematic landing page
  - National Parks in Finland
- Activity pages
  - Winter Sports in Finland
  - Hiking in Finland

#### Newsletters

Exclusive Newsletter, 640 000 recipients



+ Support for des campaign conte



earlier Life Co.







aTellen



## Visit Finland B2B work 2021-2

- E Travel Training
  - Showcasing Finland products and training sales channels
- B2B communication

- Lift up Finnish offering in B2B newsletter, virtual meetings & later hopefully face to face meetings

### MOTIVE BASED VIRTUAL SALES OPPORTUNITIES

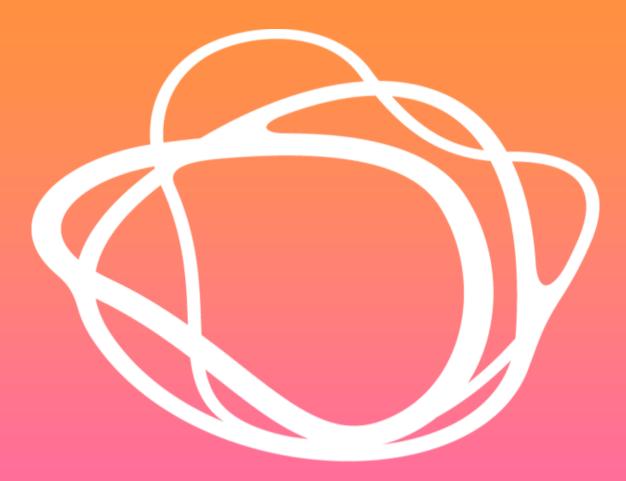
- Engaging regional partners to build up sales networks, increase online channel visibility and sales
- Strong link to regional segmented offers, sustainable focus
- Prepare market partners for site inspections and marketing campaigns
- Onsite sales (On hold)
  - Workshops and sales events in Finland and markets, Fam trips & inspections individual and groups
  - Nordic Workshop in Frankfurt 7th September 2021 planned as first on site sales event



## Motive based and regional webinar contents throughout the year

- April 15. Live like a local Oulu Region / Doerz
- May 4. Lakeland West/ sustainable Scenic routes + best "hidden" resorts and hotels for touring
- June 8.-10. Helsinki sustainable smart City / Helsinki Biennale
- August 10-11. Best sustainable travel Finland hotels and resorts (STF label only)
- September 23.9 Lapland winter wonderland -Northern lights + skiing
- October 13.-14. Lakeland East touring and cottages & resorts in Lakeland
- November 16.-18. Self catering nature holidays: camping/ mökki/ apartments/ special accommodations
- December 7.-9. Christmas special, Santa Claus Live, elves, huskies, and co.





## Visit Finland