

2025 - Ça va!

Finland: Strong but less demand from FIT.

Tour operator charter business growing

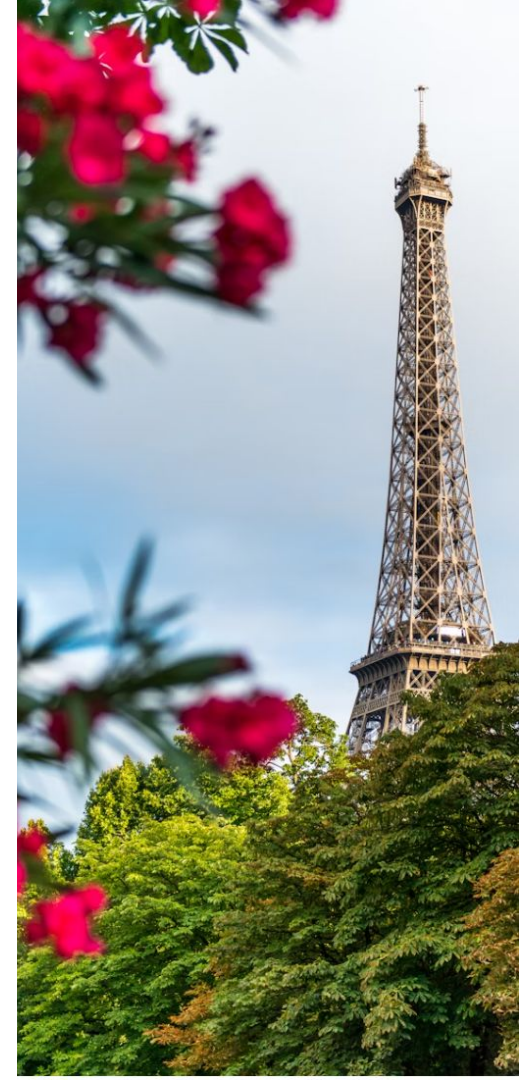
Sweden : Growing both summer and winter, FIT and groups

Norway : Strong winter and an excellent summer with group series
and self drive FIT's

Iceland : A good year and still growing in winter

Denmark : Significant City Break FIT demand including self drive

Baltics: A more stable mix of group and FIT than previous years



Patterns and trends

2024 French market enjoyed record sales to the Nordics

2025/2026 is still strong but prices are getting high

FIT sales to the Baltics increasing in 2025

More French agencies specializing in **'slow-travel' programs**

Summer

Norway and Iceland are top destinations and Copenhagen top city
Sustainable programs and local experiences in the summer season
are widely available



Winter

Winter:

CPH, STO and Oslo city break numbers are growing

Many renting hire cars.

Finland is still strong but is getting too expensive

Rovaniemi as a hub is very crowded

Tromsö is popular but getting very crowded

Swedish Lapland is growing



2026

Sales are expected to continue strongly for the Nordics.
Integration of SAS with Air France is expected to give new routes and attractive prices.

French customers tend to reserve later and can therefore be challenging
Terms & conditions are becoming stricter for the operators and agencies.

Need for Nordic NTO's to engage in stronger marketing campaigns for the lower seasons

Enormous potential, many holidays makers are looking North
The French Economy is currently the biggest challenge



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