

# What's going on with the German travellers?

Diving into the RA 2024 Report for Visit Finland

12 February 2025  
Ulf Sonntag, NIT





- » Holiday demand & interests of the Germans
- » Annually since 1972
- » 7,000 interviews *face-to-face* plus 7,000 interviews *online*
- » Multi-client
- » Non-profit association

Plus Deep Dive: 1,000  
online interviews with  
potential guests to  
FIN/SWE/NOR



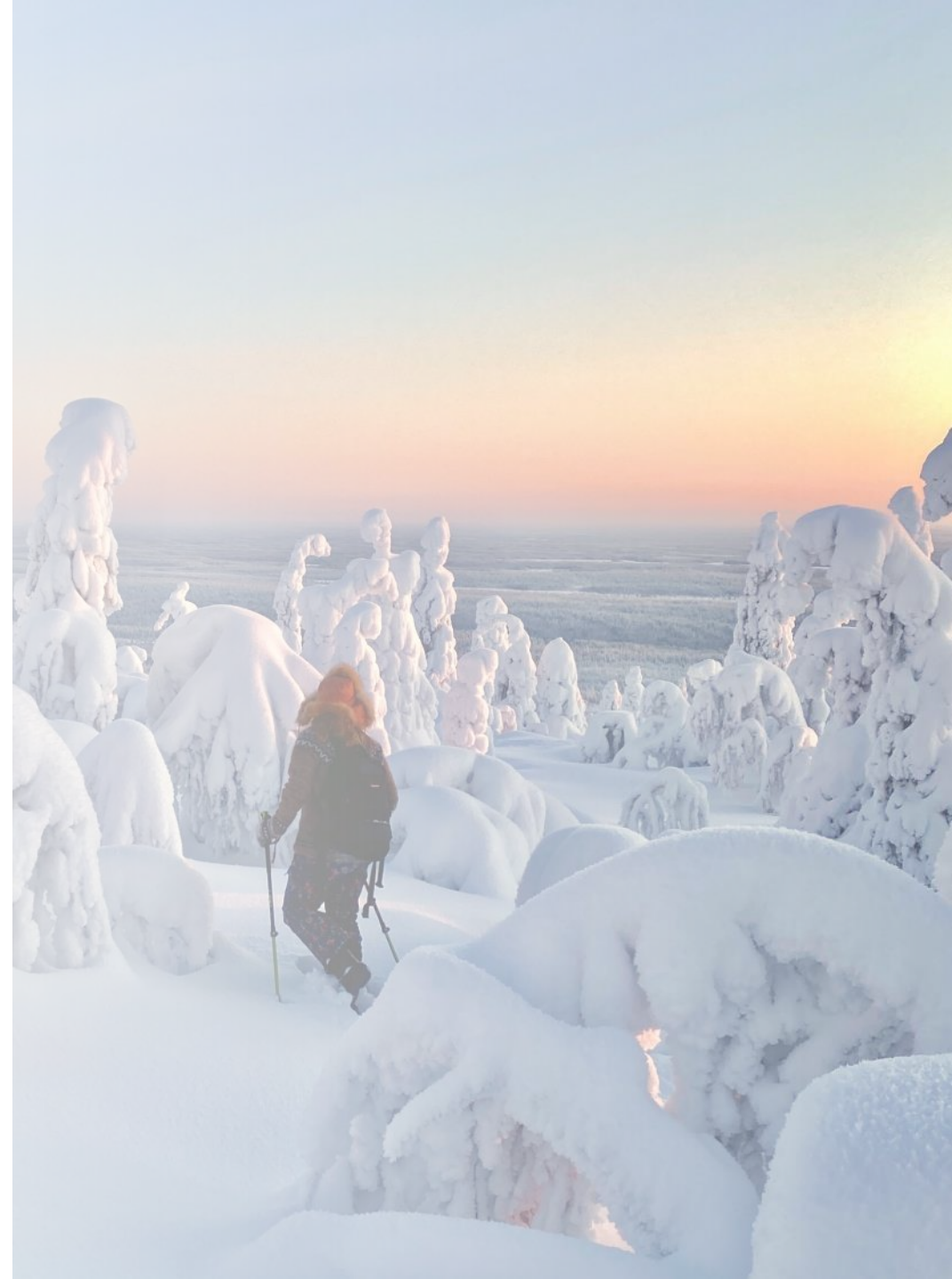
Visit Finland



Studiosus



You can count on the  
German market!



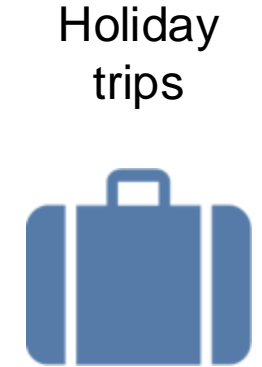
# Volume of holiday travel in 2023

Amazing post-COVID recovery



**54.2  
million**

2022: 53.1 m  
2021: 47.8 m  
2020: 44.6 m  
2019: 55.2 m



**64.5  
million**

2022: 67.1 m  
2021: 55.1 m  
2020: 50.5 m  
2019: 70.8 m



**86.3  
billion**

2022: 80.1 bn  
2021: 56.0 bn  
2020: 45.1 bn  
2019: 73.1 bn

Slightly more travellers  
& slightly fewer trips,  
spending at record level

Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2023 lasting 5 days or more  
Source: RA 2024

# How important are the Nordics for the German travellers

Mediterranean 10x bigger than Nordics, both increasing



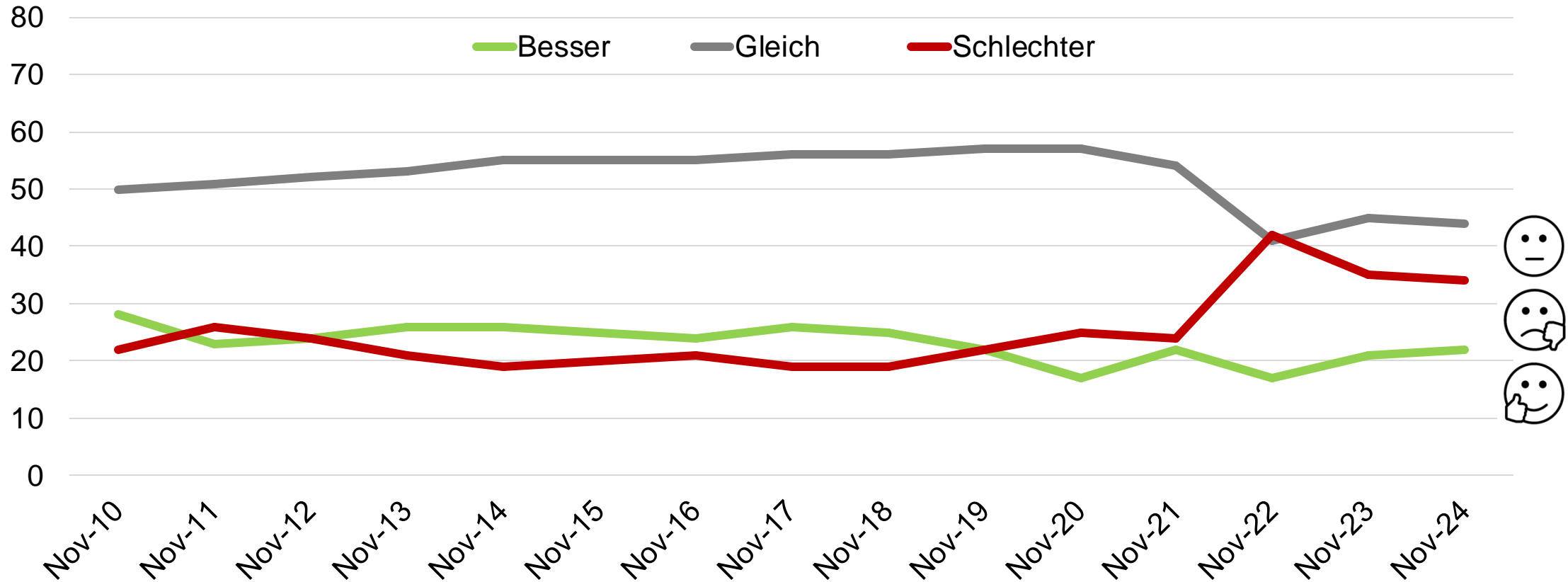
43% Mediterranean ↗  
EU and outside EU

8% Alps ↘  
Alpine regions of DE, AT, CH, FR, IT, SL

4% Nordics ↗  
FI, DK, SE, NO, IS

# Personal economic situation in the eyes of the people

## Nothing to be enthusiastic about, but better than previous years

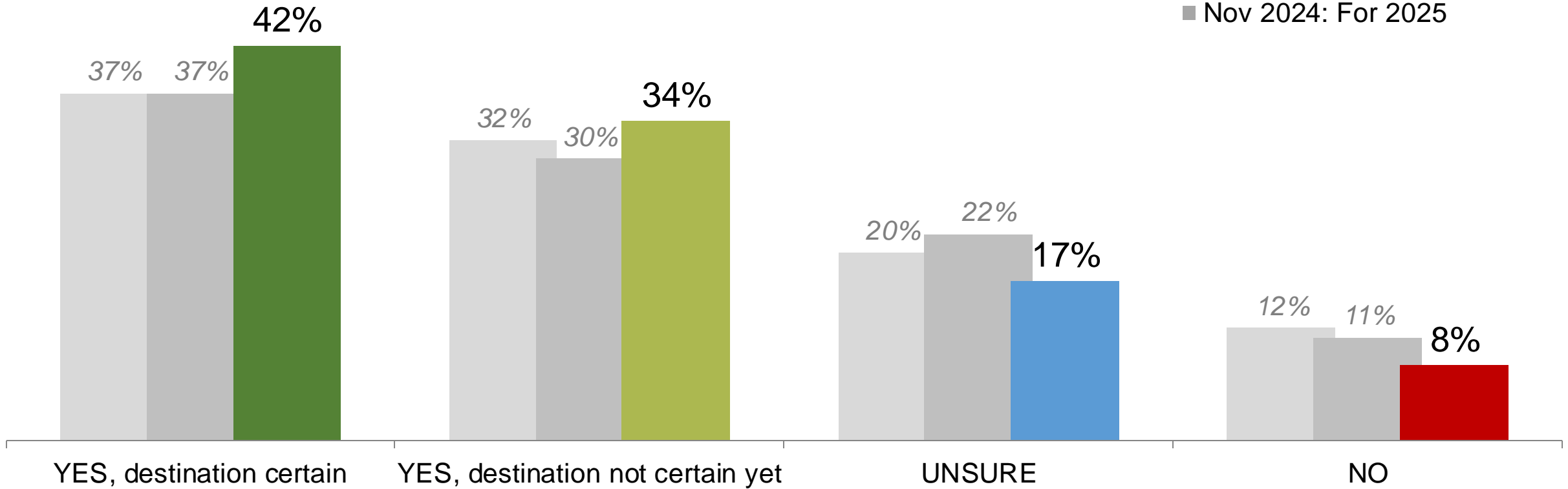


Question: What will your personal economic situation be like in about a year's time?  
Basis: German-speaking population, aged 18-75, in Germany  
Source: RA online 11/2024

# Holiday travel plans in the next 12 months

## Fantastic!

- Nov 2022: for 2023
- Nov 2023: For 2024
- Nov 2024: For 2025



Question: Do you already have holiday plans for the next 12 months? Which of this list applies to you?  
Basis: German-speaking population, aged 18-75, in Germany  
Source: RA online 11/2024





How many like to  
travel to Finland?



# Interest to travel to **FINLAND**: 3.5 million Germans are generally interested to travel to Finland between 2024-2026

## Finland last 3 years

**0.5 % (0.3 million)**

of the population in Germany (aged 14+) have been to Finland on holiday or short holiday in the years 2021-2023

## Finland next 3 years

**5.0 % (3.5 million)**

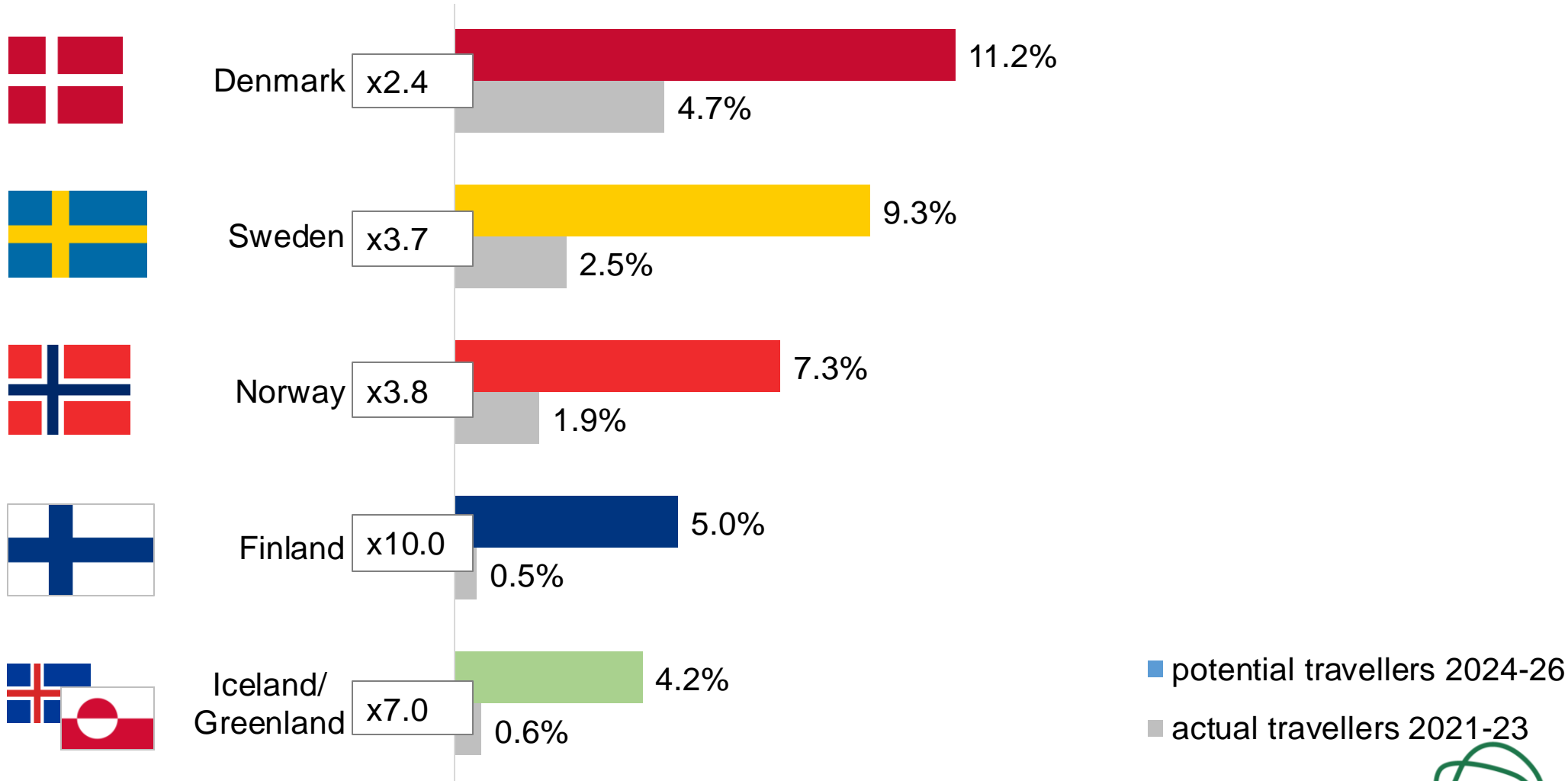
of the population in Germany (aged 14+) are "almost definitely planning" or "generally considering" to spend a (short-)holiday in Finland in the years 2024-2026.

Interest for Finland 10x bigger  
than experience  
→ space for marketing

"In which of these countries have you spent a holiday during the last three years (that is 2021, 2022 or 2023)?"

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) 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 2024

# Interest to travel to FINLAND: Share of actual and potential guests compared with competitors in Northern Europe



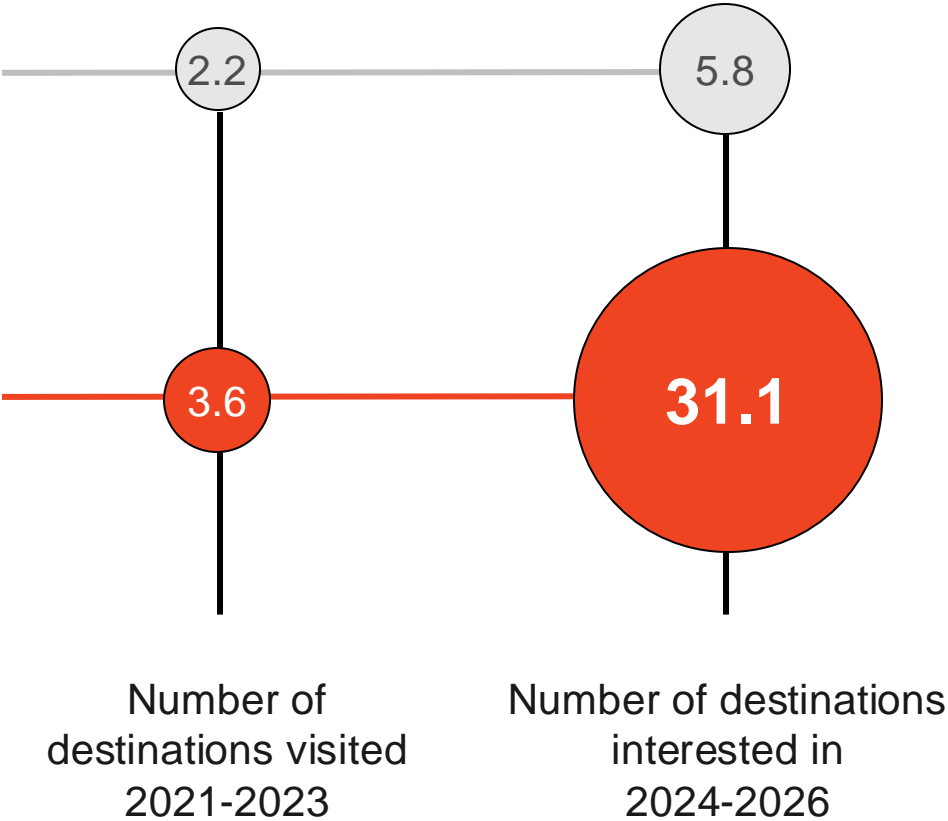
"In which of these countries have you spent a holiday during the last three years (that is 2021, 2022 or 2023)?"

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) 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 2024

Competition for FINLAND: Potential guests to Finland have also many, many other travel options in mind

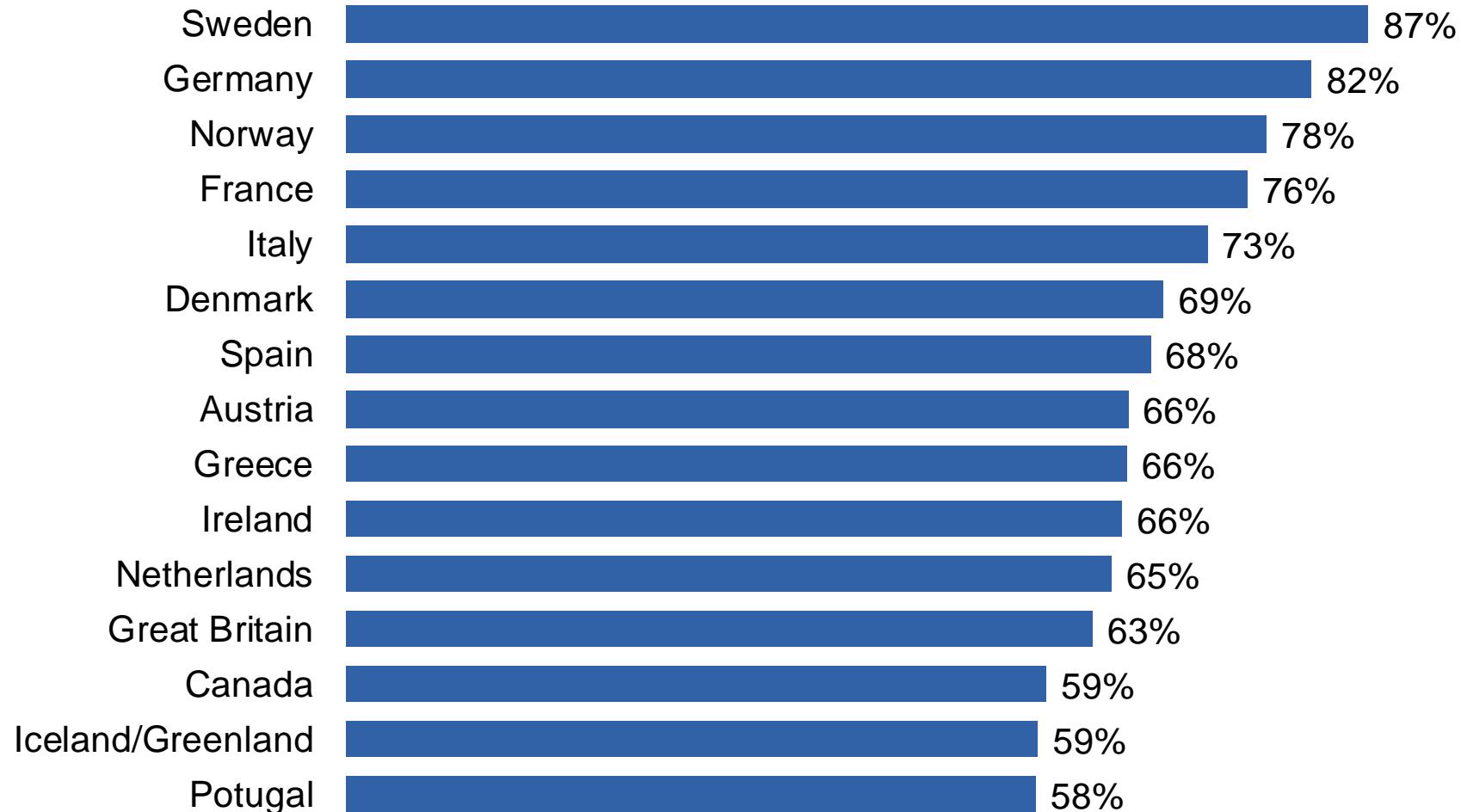
Population

Potential travellers  
to Finland



# Competition for FINLAND: Potential guests to Finland have many alternative destinations on their minds

People, interested to go to Finland 2024-2026 for a holiday also would go to ...



Basis: Persons interested to travel to Finland 2024-2026 ("almost definitely planning" or "generally considering") in German-speaking population 14+ years in Germany; Set of 45 destinations abroad. Source: Reiseanalyse 2024

## Finland on the German market:

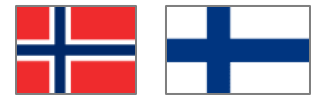
Most are interested in all three Scandinavian destinations



**2.6** million



**0.4** million



**0.1** million




**0.4** million

Scandinavia-Lovers

NOT

Finland-Lovers





# Image of Finland as a holiday destination

# Destination Image: Finland is on the map!

## Scenery and Nature are leading the destination image



Awareness of Finland as a holiday destination

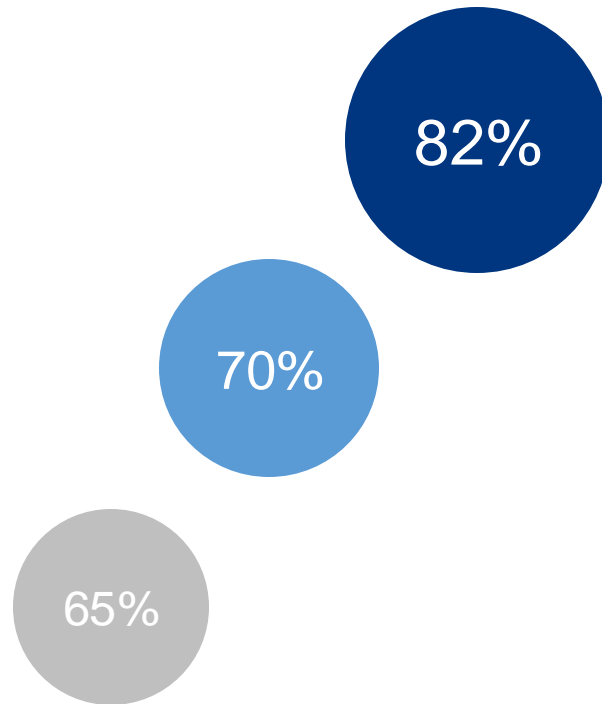


Image of Finland as a holiday destination in the population\*

- Beautiful landscape (66%)
- Spectacular nature (61%)
- Good opportunities for winter sports (54%)
- Good hiking (49%)
- Interesting traditions (38%)

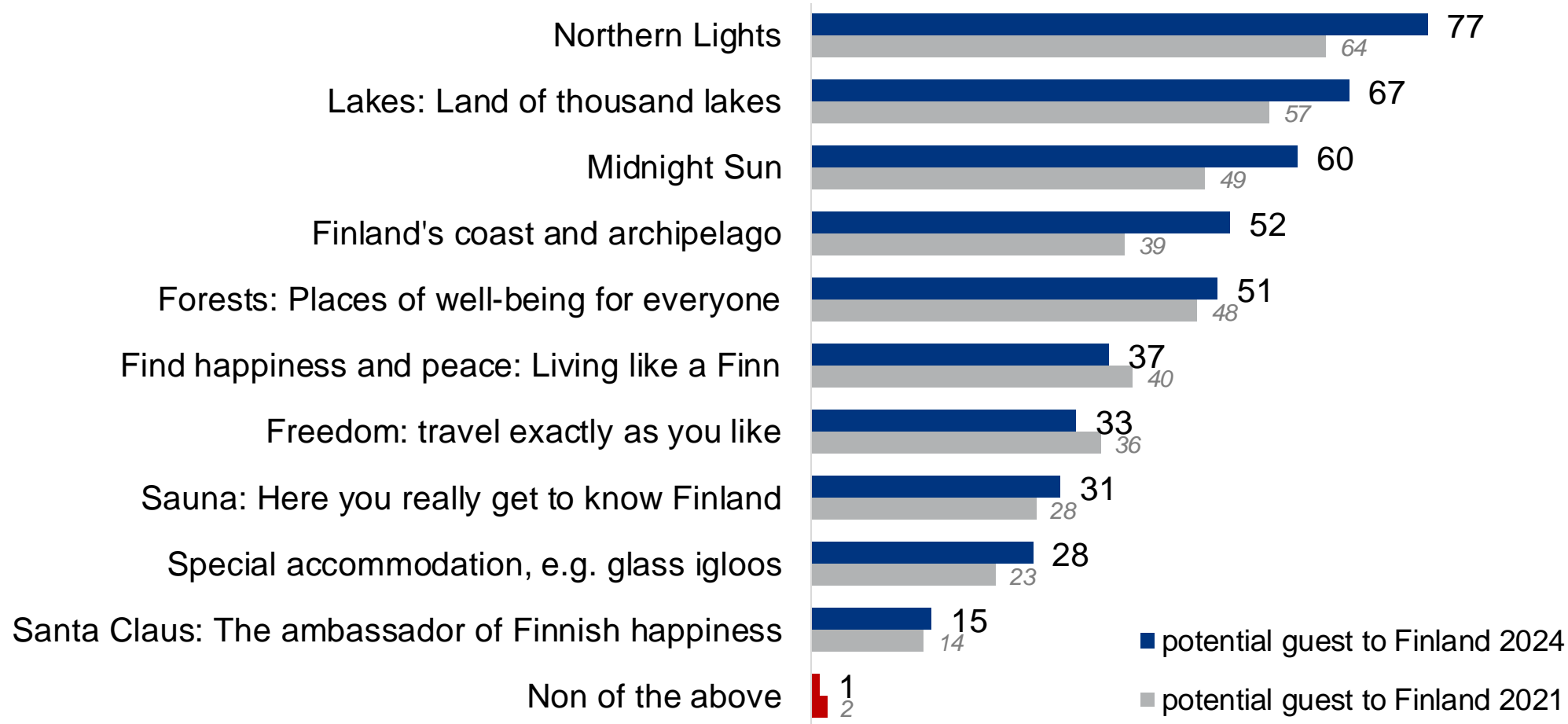


Very similar image of Finland and Sweden – importance to stress the local and unique aspects

\*Respondents, who did NOT state to “I don’t have an imagination about this destination”. Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to ...?”  
Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024



# Highlights of Finland: Northern Lights, Lakes, Midnight Sun, coast and archipelago



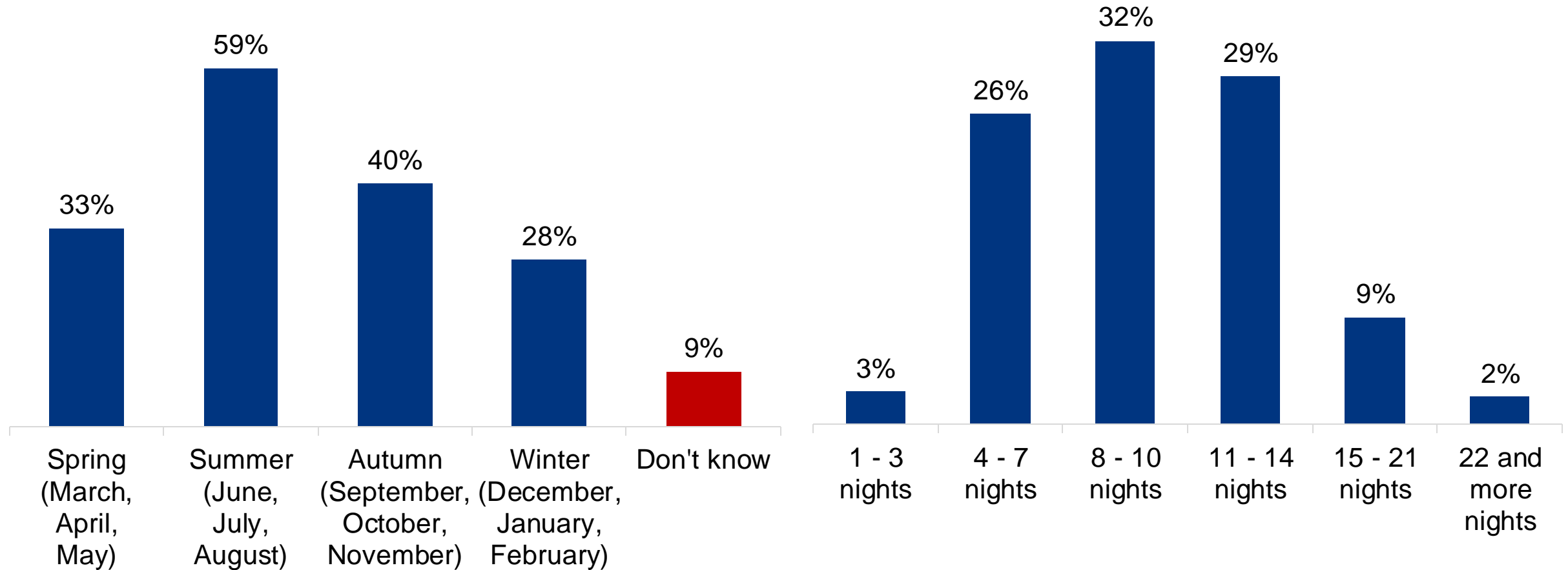
F2: What do you think are the special highlights of Finland as a holiday destination? Please select all answers that are applicable; in %  
Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)  
Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

Diving deeper ...  
How do the Germans  
want to travel to  
Finland?



## Preferred season & duration:

Summer and autumn, one to two weeks of stay

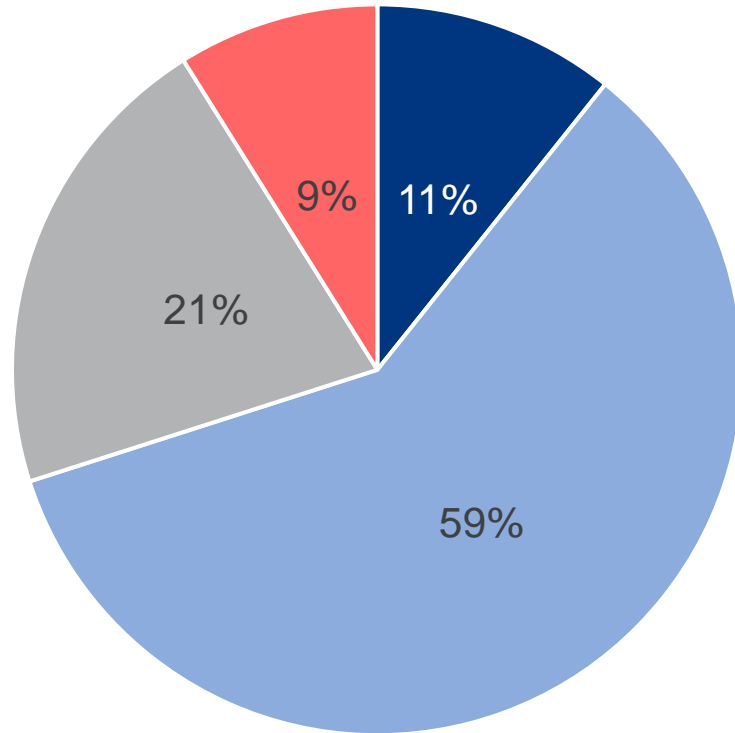


F4a: At what time of the year would you like to travel to Finland?

Basis: Finland Potential 2024-2026 (n= 718);

Source: Finland Ad-hoc-survey 2024 by FUR/NIT

## Sustainability: For 70 %, sustainability is a factor in the decision to travel to Finland

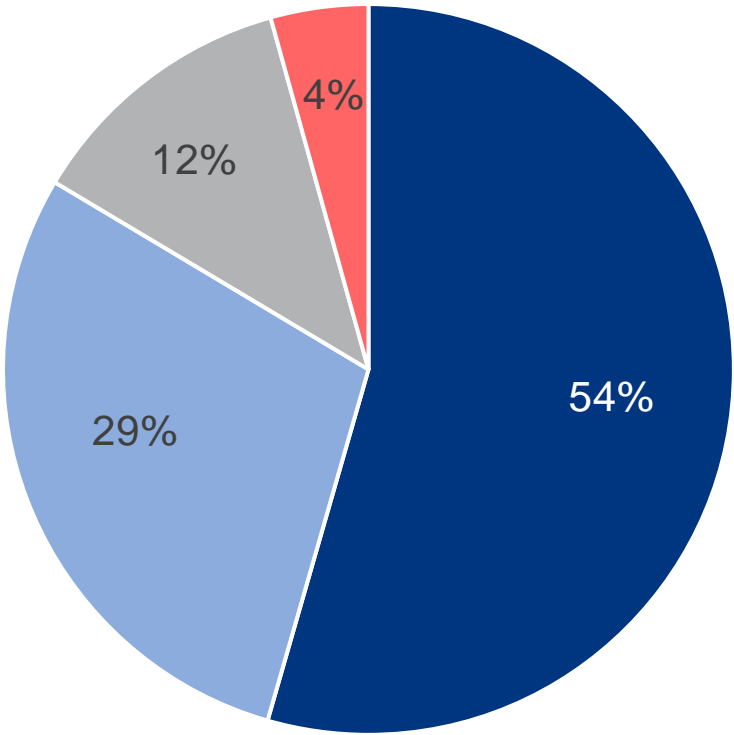


- Sustainability will be the decisive factor in deciding between otherwise equivalent offers.
- Sustainability will be – among other things – an aspect in the decision for this trip.
- Sustainability aspects will have no significance in the decision for this trip.
- I am generally not interested in sustainable travel.

F17: Now the focus is on sustainability in holiday travel, i.e. how ecologically compatible, resource-saving, environmentally friendly and socially acceptable the holiday should be. If you think about a future holiday trip to Finland: Which of the following statements applies?

Basis: Finland Potential (n= 718); Source: Finland Ad-hoc-survey 2024 by FUR/NIT

# Visit-Finland-Segments: More than 50% of the potential guest to Finland agree to the 'nature lover' segment statement



■ Nature Lover

*“There's something magical about seeking out the natural wonders of the world. It's a reminder of how small we are in the grand scheme of things, and how much awe-inspiring beauty there is to discover beyond the boundaries of our daily lives.”*

■ Lifestyle Traveller

*“Traveling is not just about discovering new places, it's about discovering a new perspective. It's about immersing yourself in the local culture and lifestyle and gaining a deeper understanding of the world around you.”*

■ Outdoor Explorer

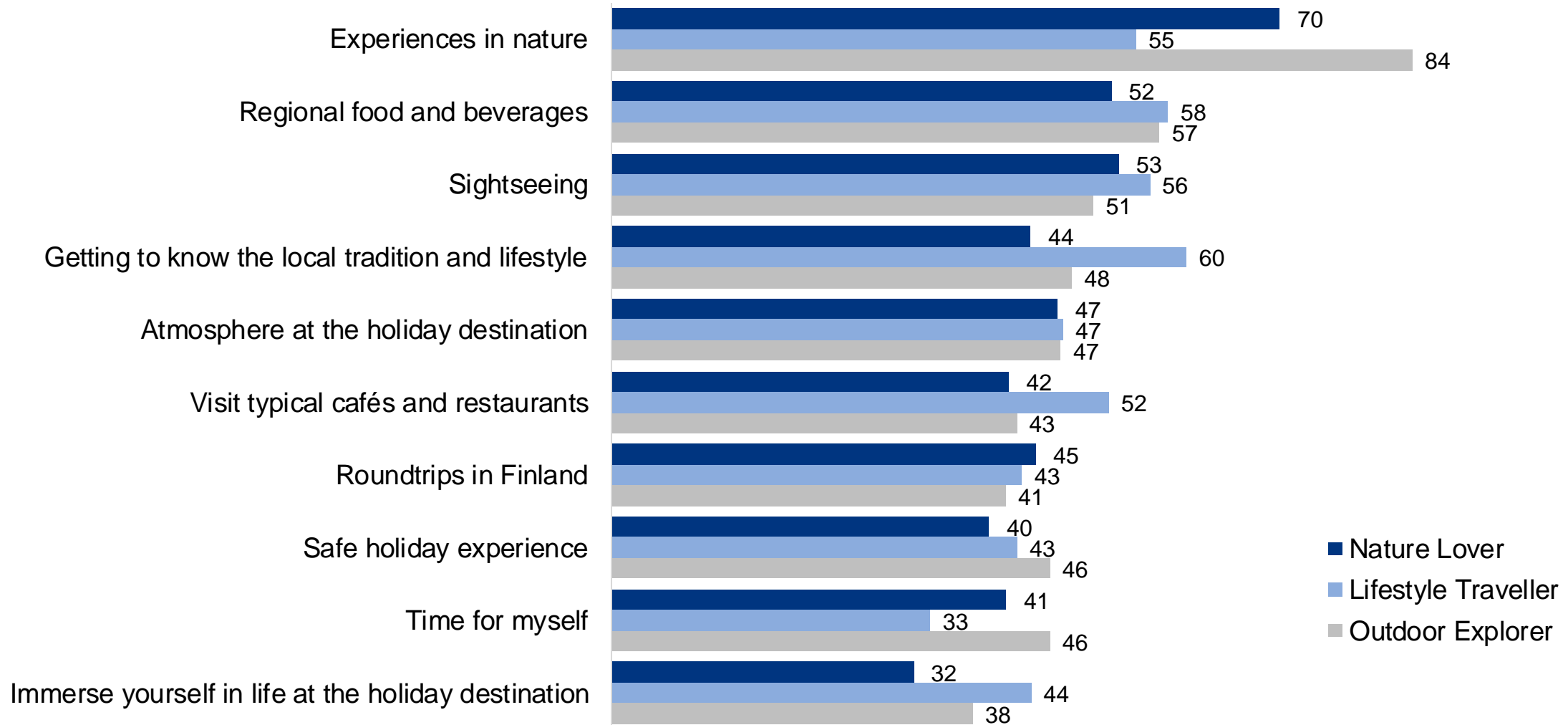
*“Nature is not a place to visit, it is home. The great outdoors offers endless opportunities to challenge ourselves and to push our limits. Whether it's running, hiking, or biking, these activities allow us to connect with nature.”*

■ None

F1: When you think of traveling to Scandinavia, which of the following statements best applies to you personally?  
Basis: Finland Potential (n= 718);  
Source: Finland Ad-hoc-survey 2024 by FUR/NIT



## Example Visit-Finland-Segments: Like to experience in Finland Top 10



F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %  
Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87)  
Source: Finland Ad-hoc-survey 2024; RA online 11/2020

# Visit-Finland-Segments characteristics

## Interesting differences between the 3 segments

### Nature Lover

Northern Lights  
More car & cruise ship  
More round trips, touring  
shortest

### Lifestyle Traveller

More hotels & plane  
More city, culture,  
sightseeing, village, culinary  
holidays

### Outdoor Explorer

More lakes, **forests**,  
archipelago, freedom &  
sauna  
Less hotel;  
More farm stay & camping  
More ferry, camper & bike  
More nature & hiking  
holidays  
Longest  
Less package; more  
individual



A man and a woman are standing on a grassy hill, looking out over a scenic landscape. The woman is pointing towards the distance. In the background, there is a large body of water, a town with parked cars and buildings, and a forested area. The sky is blue with scattered white clouds. The overall mood is bright and optimistic.

# Go for it!

## Call to action!

- You can count on the German market – despite all crises, demand for travel is high and looks promising for 2025
- There is a slight momentum towards the Mediterranean and long haul destinations, this might be a challenge for Finland and other Nordic destinations
- 3.5 million Germans are interested to travel to Finland in the next 3 years – 10 times more than visitors in the last 3 years. But competition is fierce.
- Finland is very unique and scores high for its scenery, nature, winter and hiking.
- We now know a lot how the Germans like to travel to Finland and about the characteristics of the VF-Segments. This can be used in product, marketing and communication.
- There are very good reasons to travel to Finland, but some things might need a bit of explanation.





# Thank you & let's stay in touch!

[ulf.sonntag@nit-kiel.de](mailto:ulf.sonntag@nit-kiel.de)

<https://www.linkedin.com/in/ulf-sonntag-1885505/>

[www.nit-kiel.de](http://www.nit-kiel.de)  
[www.reiseanalyse.de](http://www.reiseanalyse.de)