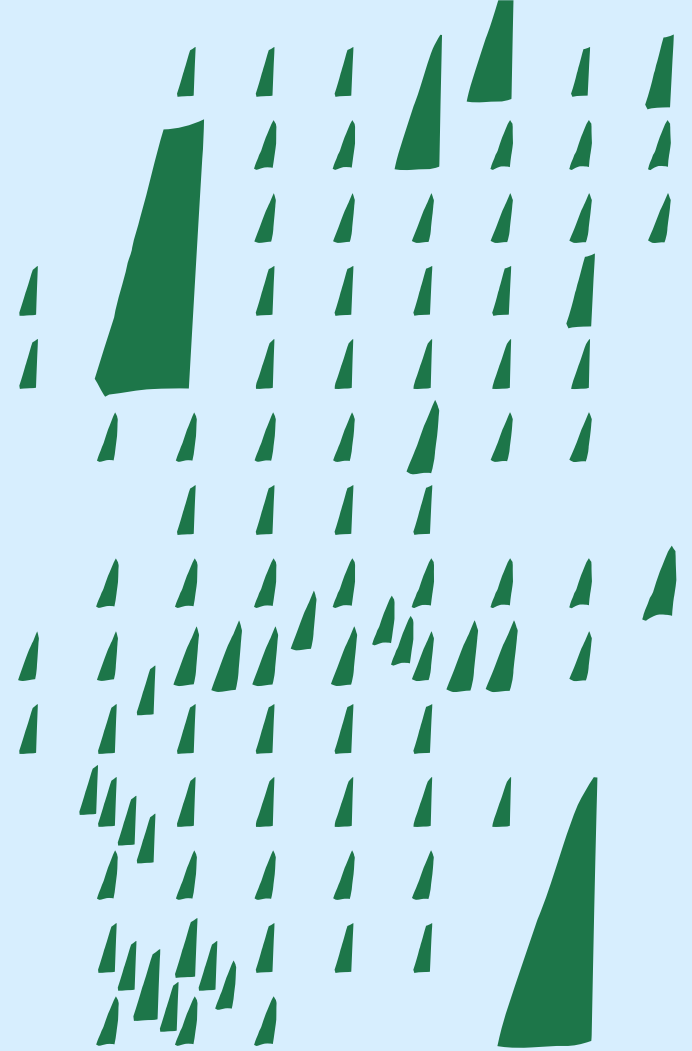


FRANCE

Country Report



Background of the study

Survey data

Markets: Germany, Spain, France, USA, Japan

- Spain, France, Japan: national
- Germany: West Germany and Berlin, excl. East Germany
- USA: California, Texas, New York, Massachusetts and Illinois

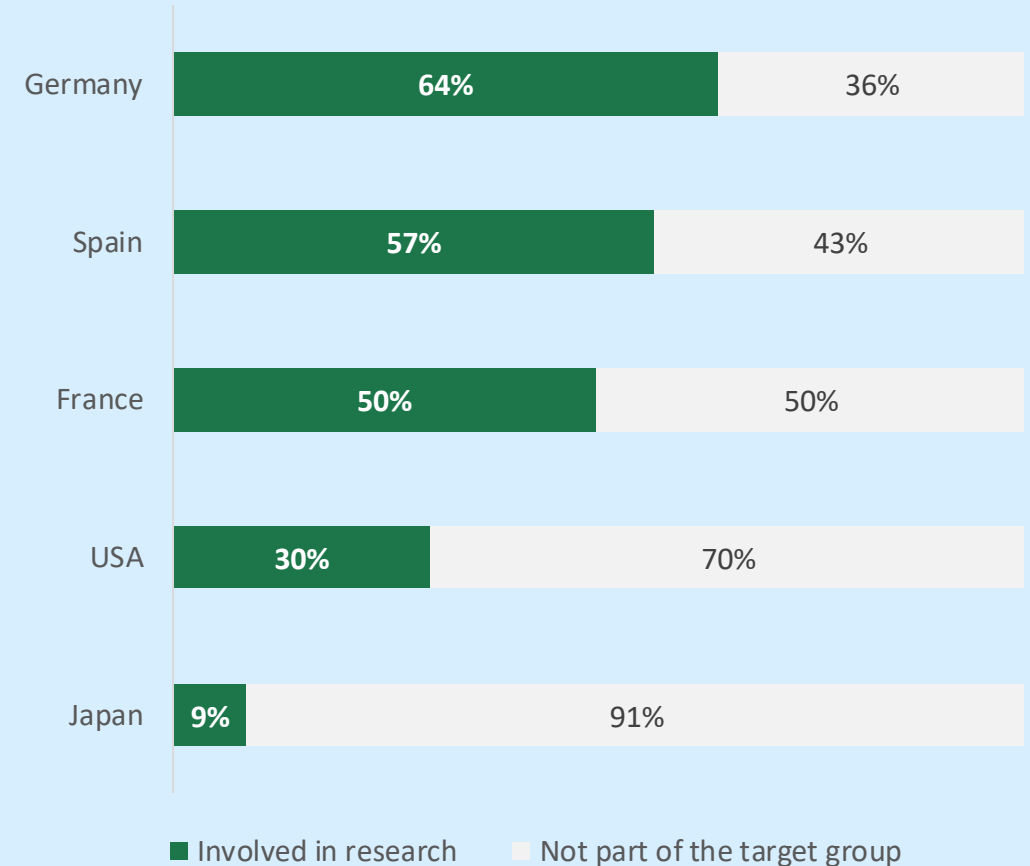
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

Data collection period: 3 July – 30 July 2025

Research method: Quantitative online survey

Sample size: Germany 1020 IP, Spain 1009 IP, France 1026 IP, USA 1002 IP, Japan 1003 IP

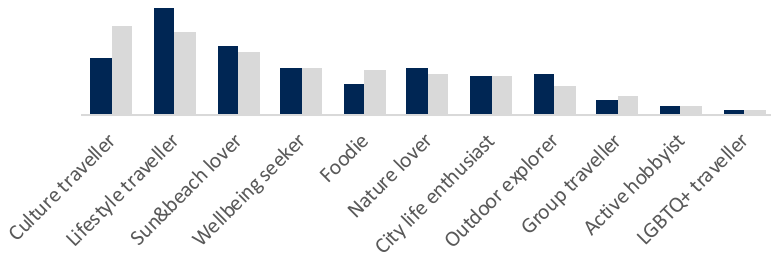
Plans a leisure trip in the next three years



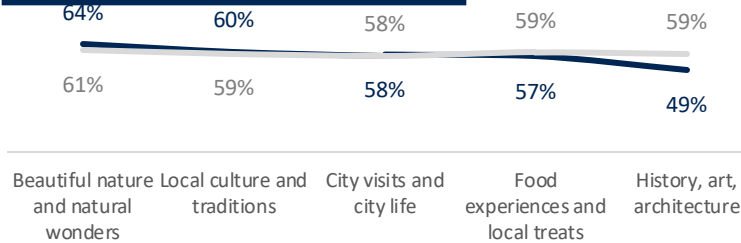
Profile card FRANCE



SEGMENTS



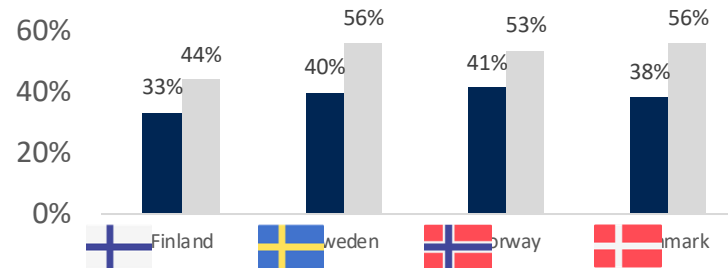
THE MOST INTERESTING TRAVEL THEMES



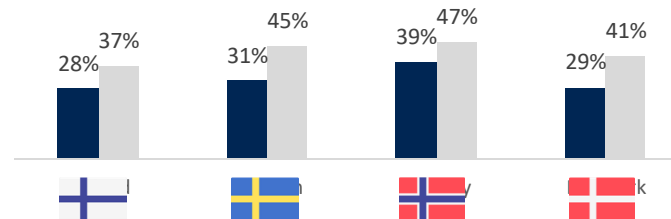
THE ATTRACTIVENESS OF FINLAND AS A FOOD TOURISM DESTINATION



AWARENESS OF THE NORDIC COUNTRIES



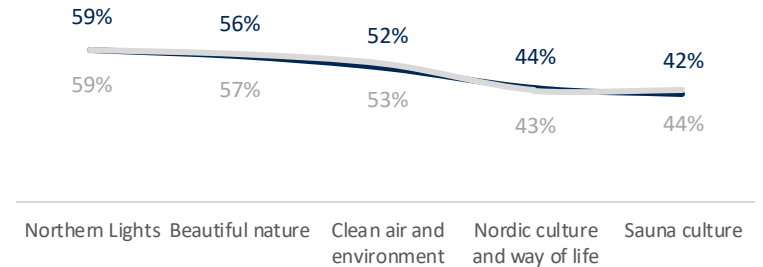
CONSIDERATION OF THE NORDIC COUNTRIES



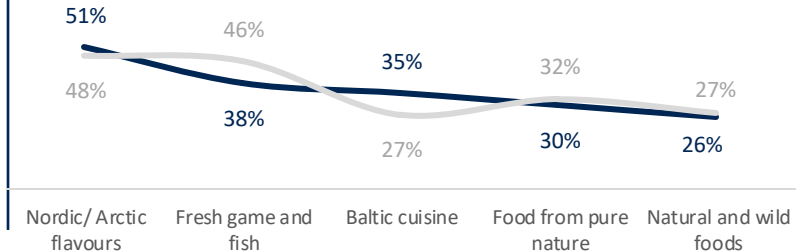
MOST IMPORTANT DRIVERS OF CONSIDERATION FOR FINLAND



TOP 5 COUNTRY IMAGES OF FINLAND



TOP 5 FOOD IMAGES IN FINLAND



Summary FRANCE

FRENCHMEN AS TOURISTS



French people are most interested in **nature, local culture, city visits and food**. They are less interested in history and art.

They mainly seek trip information on Google, friends, and review sites; the official travel pages reach 37%.

The most popular destinations are **Italy and Spain**. Of the Nordic countries, Norway and Sweden are considered more than Denmark and Finland.

Consideration of Finland is limited by **low awareness and an image of being expensive** – only 13% feel familiar with Finland.

The attraction factors that boost consideration for Finland are **Nordic culture, happiness, summer activities, safety and food experiences**. In these areas Finland currently performs very similarly to the other Nordic countries. Finland stands out the most from the other Nordic countries as the home of **Santa Claus, as well as a little with Sámi culture, lakes and aurora borealis**. However, these are not the main reasons for Frenchmen to consider Finland as a travel destination.

RELATION TO FOOD



For French tourists, food experiences play a key role, especially the opportunity to **try international cuisine** and **enjoy social dining** to connect with others. However, fine dining is less important.

French people's spontaneous image of Finnish cuisine is strongly related to **fish and seafood**, but often there is no image at all. **Unfamiliarity with Finnish food** is the biggest obstacle for Finland to consider as a food destination.

Frenchmen associate Finland and the other Nordic countries the most with **Nordic flavour**. Finland's food images do not differ much from other Nordic countries, which creates an opportunity to take advantage of the common Nordic image, but also to stand out with our own specialities. The most important images to consider Finland are **food from pure nature, wild foods, Nordic flavours and pastries**.

In fact, most French tourists in Finland would like to taste local cuisine, eat in nature, and visit markets and market halls.

FRENCHMEN VS. OTHER



Frenchmen are less familiar with Finland and the other Nordic countries than the reference countries, and the Nordic countries are also not as considered as a destination. Still, Finland's **attractiveness as a food destination** is 58%, which is slightly above the average.

Consideration for Finland as a travel destination is most influenced by the **image of Nordic culture**, which is also common with the reference countries. French travel interest is further enhanced by Finland's reputation as the **happiest country in the world** and **summer and outdoor activities**.

Finland's country image is similar in the eyes of the French and other reference countries – the strongest images are the **northern lights and beautiful nature**. However, there are differences in food images: Frenchmen associate **fresh game and fish** with Finland a little less than average, but more influenced by **Baltic cuisine**.

Among Frenchmen, **Lifestyle Traveller** is the highlight of the tourism segments, while the Foodie and Culture Traveller segments are less represented compared to other countries.

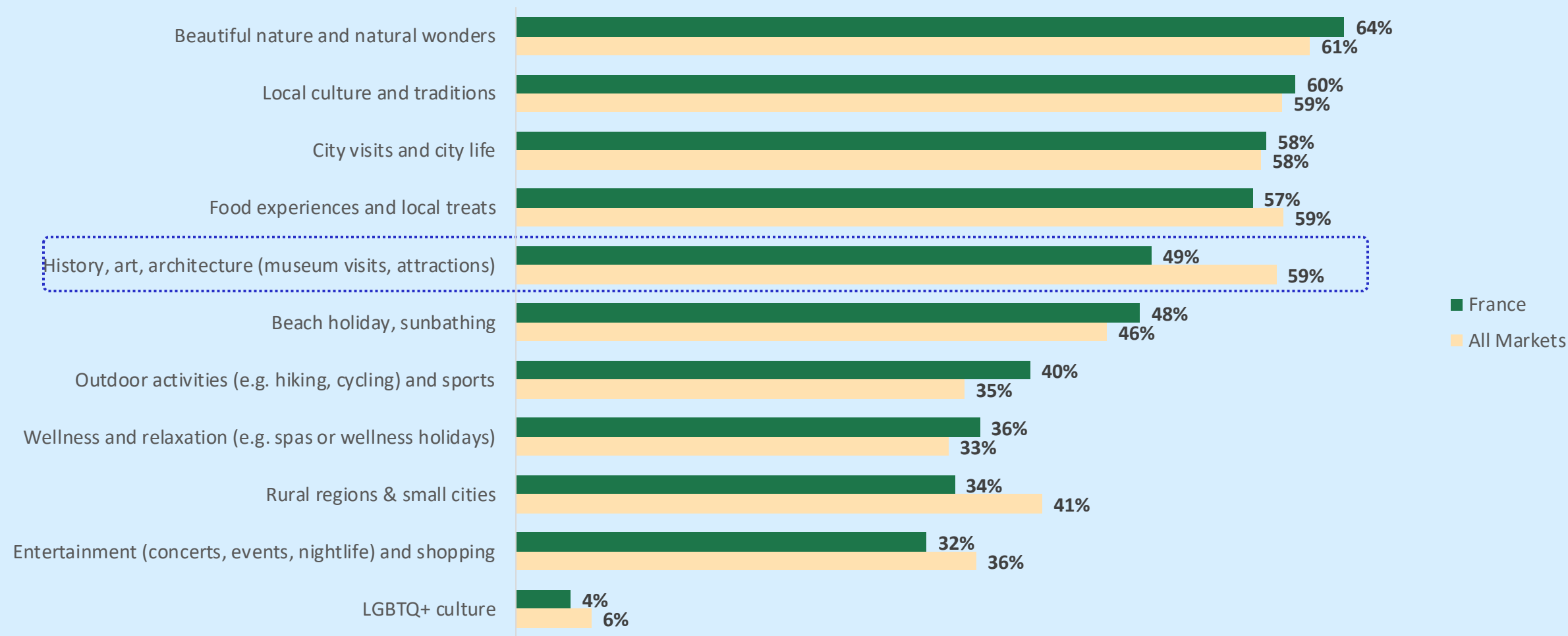
Travel behaviour & Interests



Image: Elina Manninen / Visit Finland

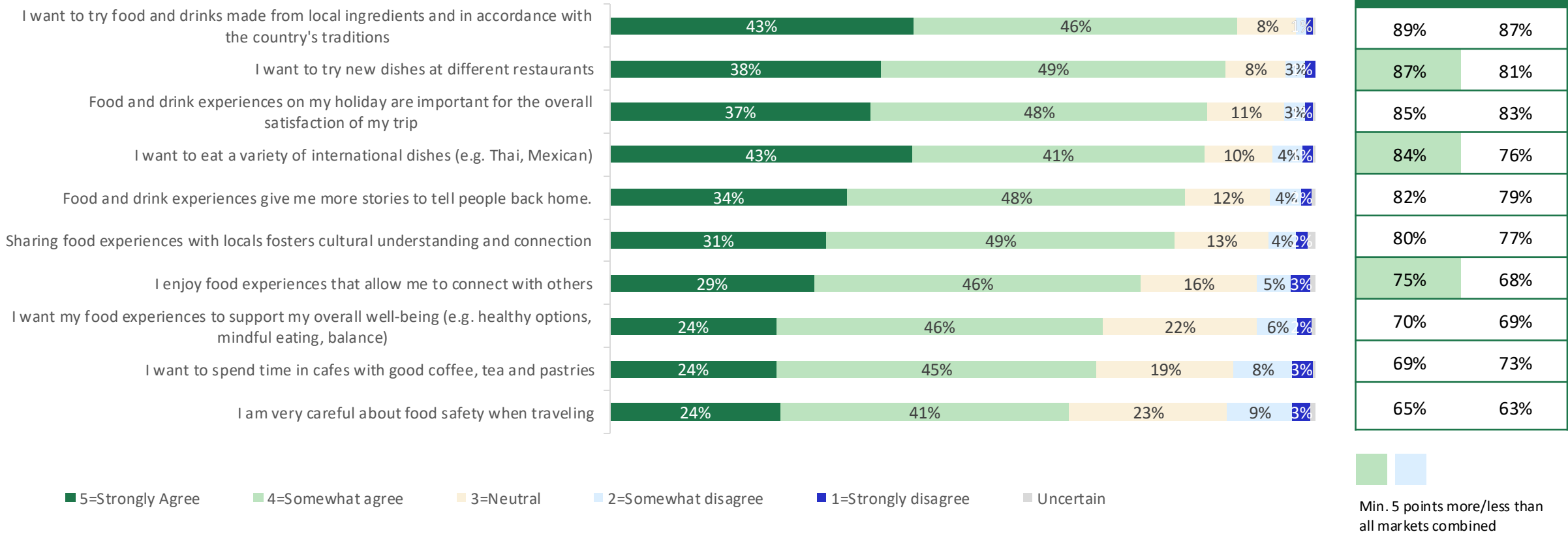
French tourists are most interested in nature, local culture, city visits, and food experiences. History, art are under-emphasized in areas of interest.

Travel Themes



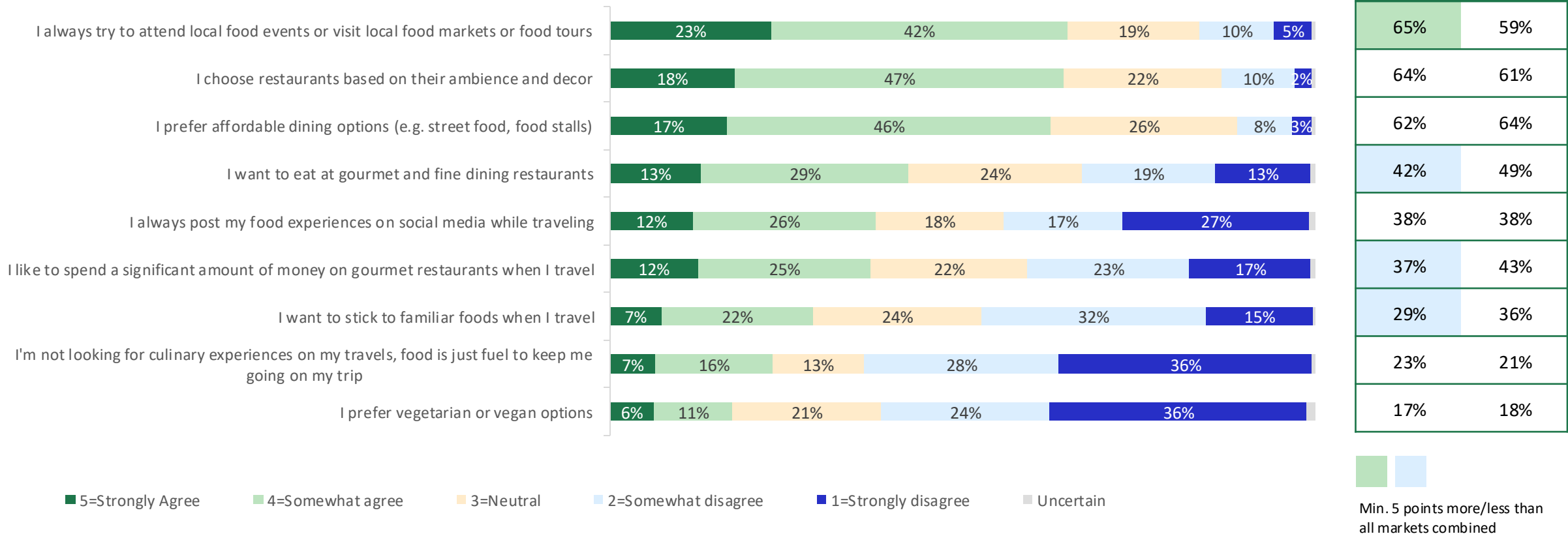
French people are most interested in local food and new food experiences. In addition, international food and social food experiences are highlighted in France.

Tourist type 1/2



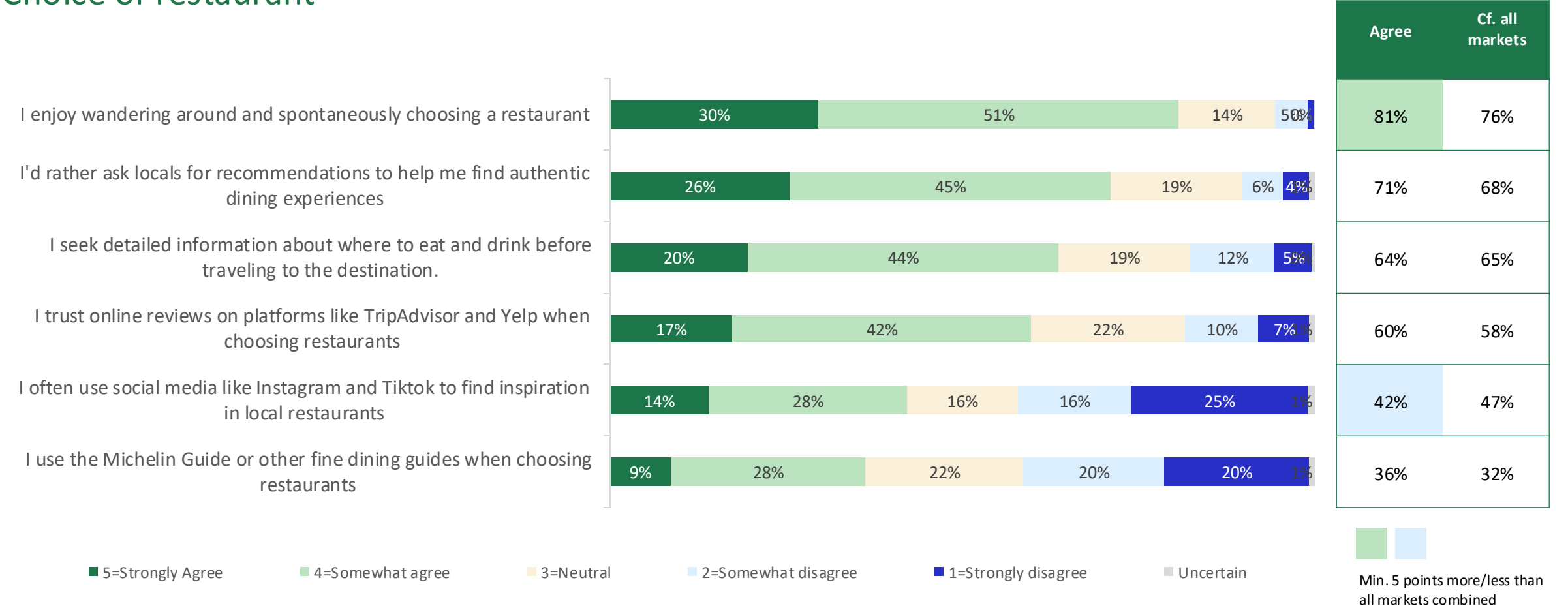
French tourists prefer to take part in local food events or tour food markets a little more than the average. Fine dining is under-emphasized.

Tourist type 1/2



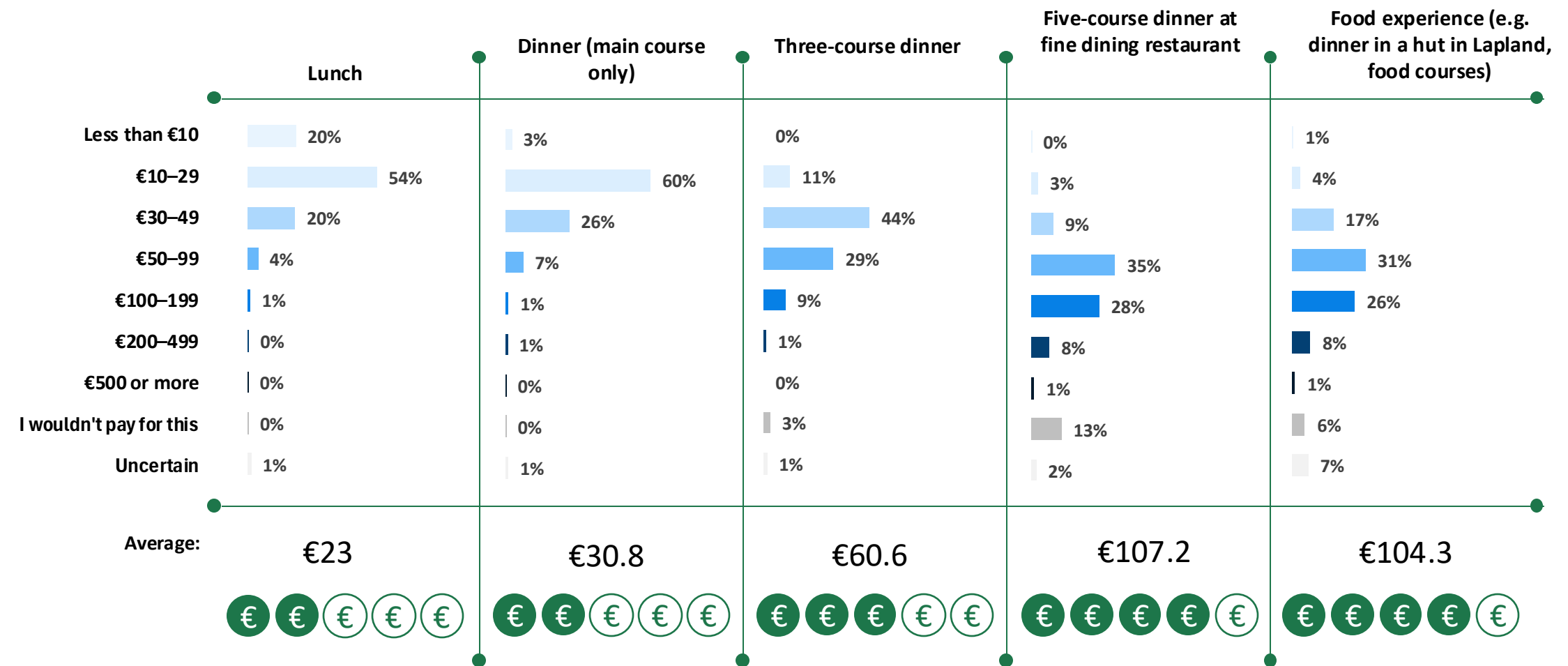
French tourists are happy to choose a restaurant spontaneously. At the same time, however, about 2/3 will look into what to eat and drink at the destination before the trip.

Choice of restaurant



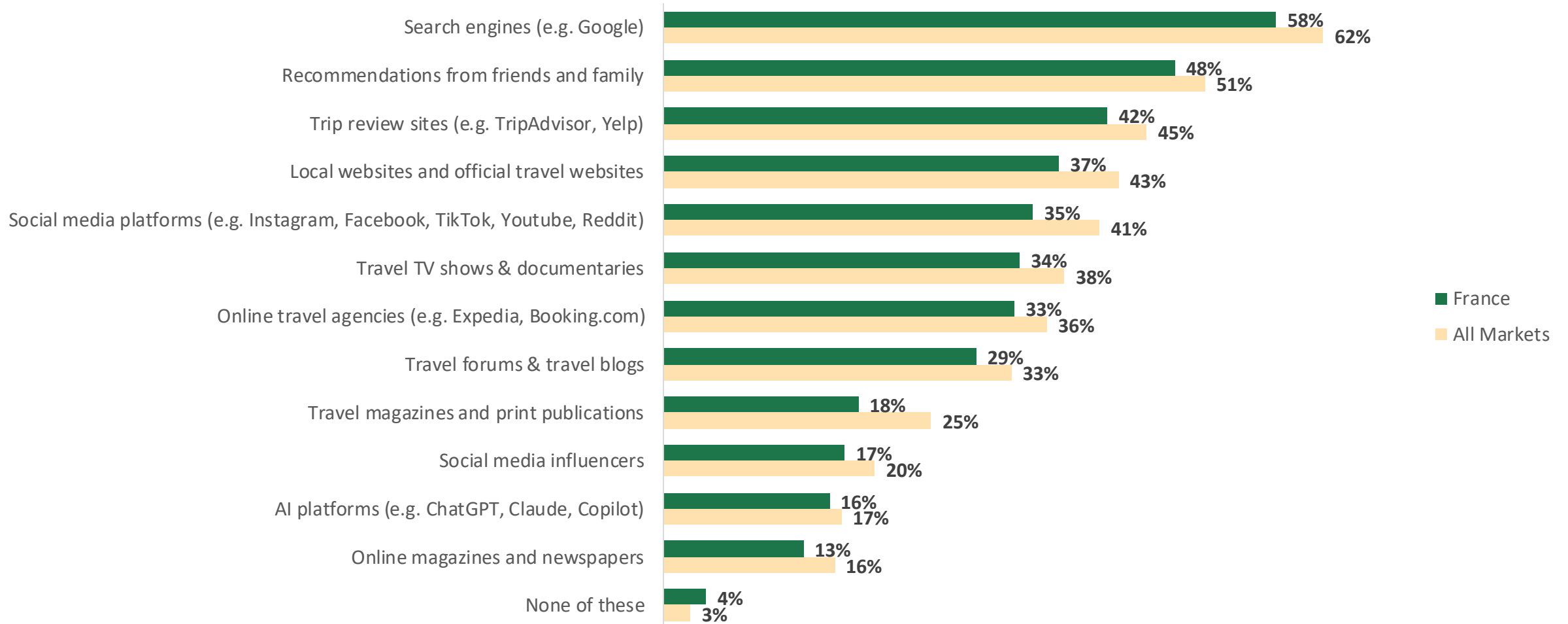
For one dish (lunch, dinner), they are willing to pay around €20-30, and for fine dining or a food experience, around €100.

Willingness to pay



The main sources of information and inspiration are search engines and recommendations from friends and family.

Sources of information



Awareness and attractiveness of destinations

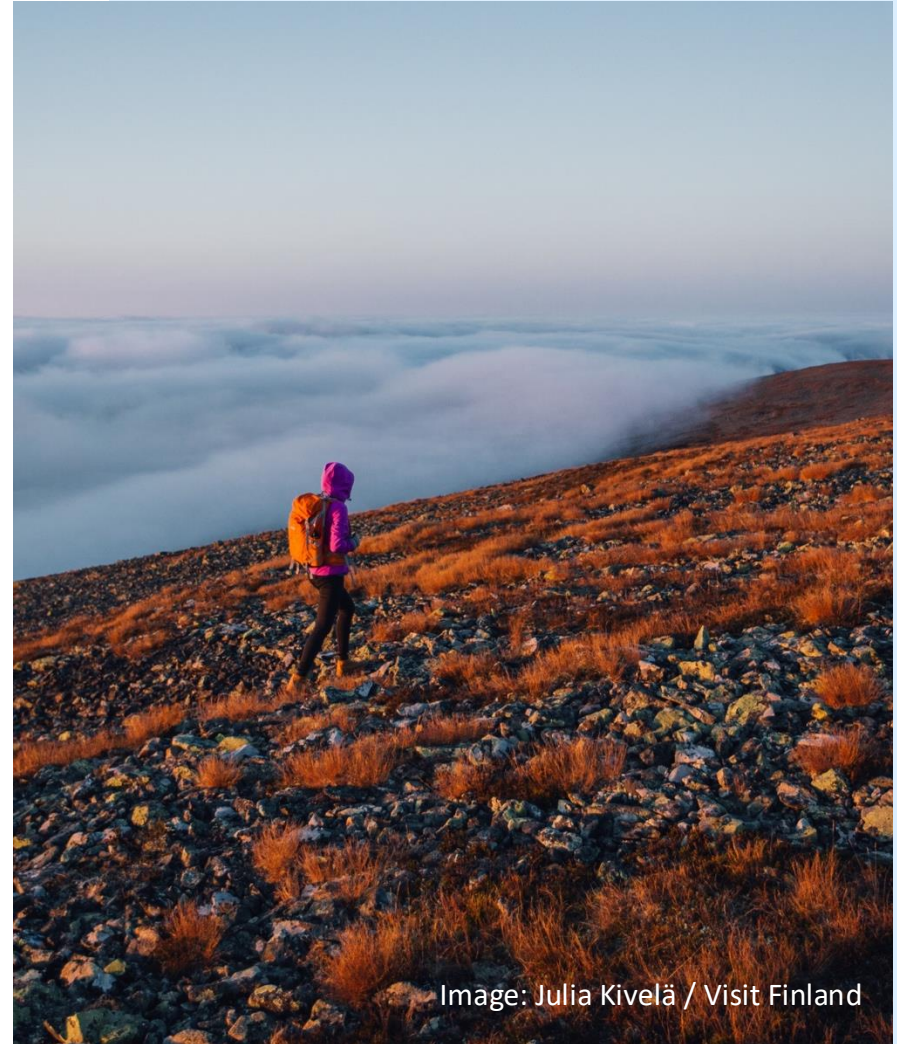
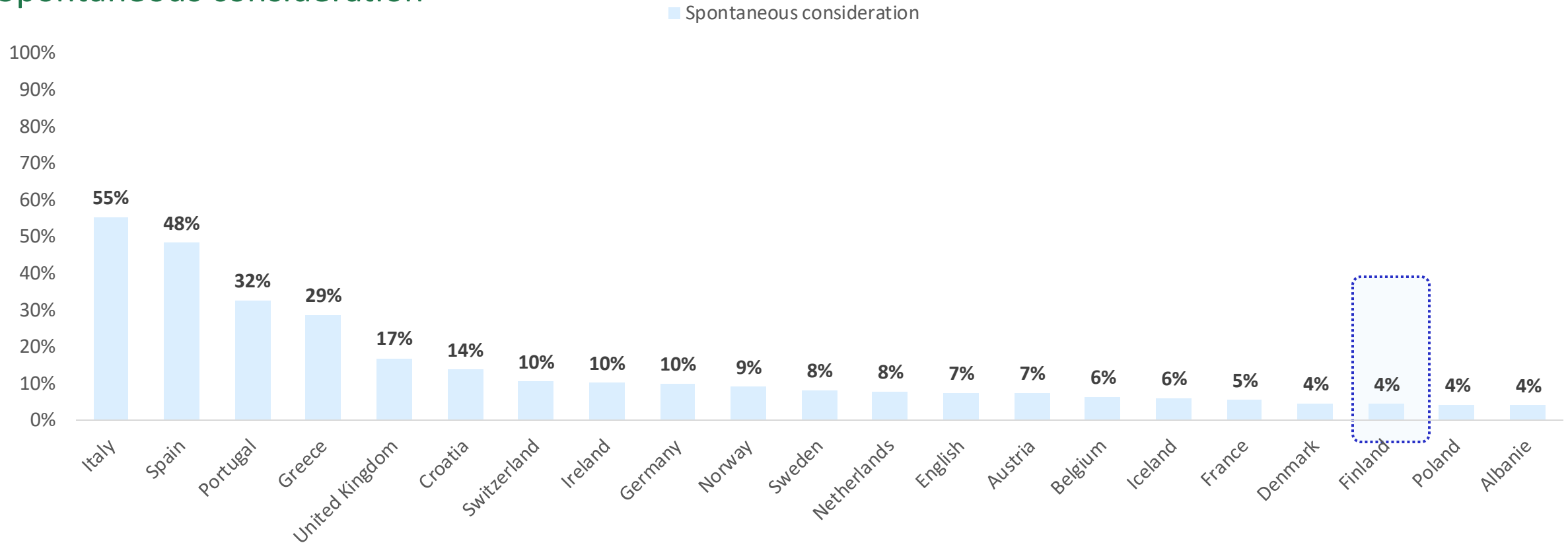


Image: Julia Kivelä / Visit Finland

Italy and Spain are the destinations that people most spontaneously choose to travel. Norway and Sweden are slightly more popular than Denmark and Finland.

Spontaneous consideration

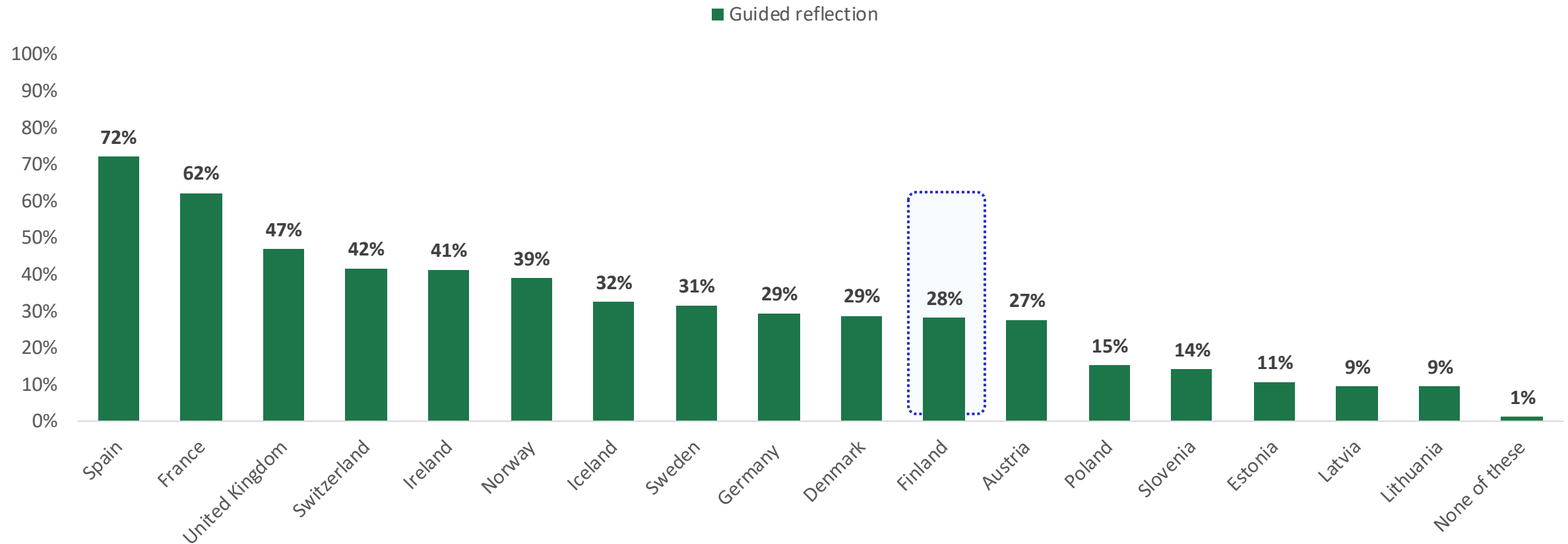


Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? (Open)

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

Spain is the most popular destination among the surveyed countries. Of the Nordic countries, Norway is slightly more interesting, Finland is on the same level as Denmark and Sweden.

Guided reflection



Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

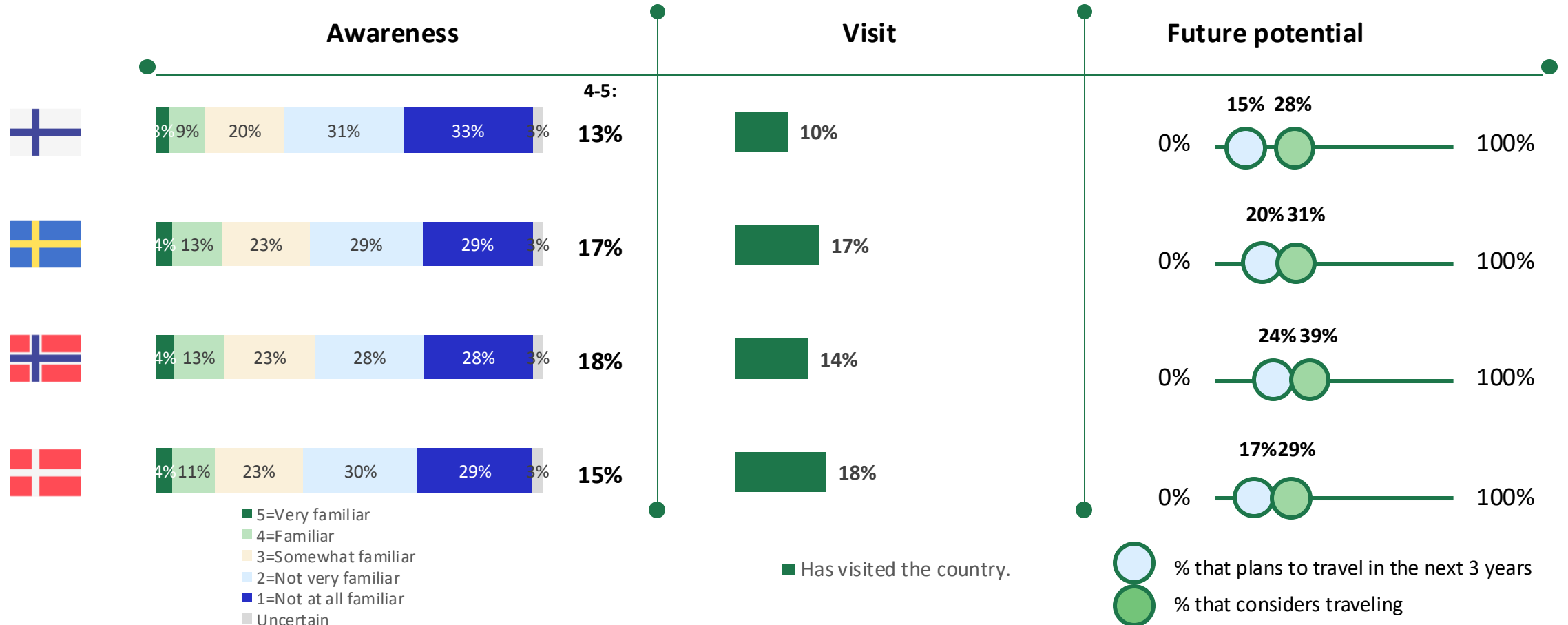
The main obstacles to considering Finland are limited knowledge of the destination and an expensive image.

Obstacles of travelling to Finland



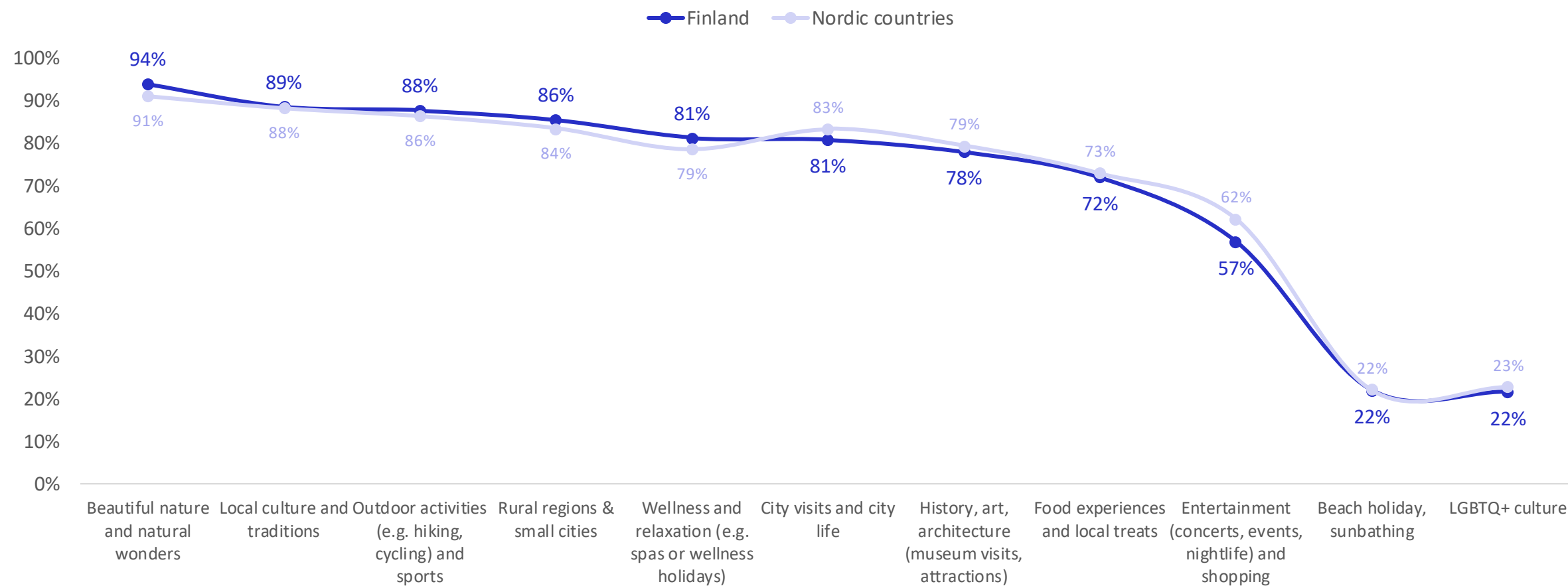
Frenchmen rated their knowledge of all the Nordic countries quite low. Finland is considered as a travel destination as much as Sweden and Denmark.

The Nordic Region: awareness, visit and potential for the future



Nature, local culture and outdoor activities, as travel themes, are equally associated with all the Nordic countries, and Finland looks very similar to the Nordic countries.

Linking travel themes to Finland and the Nordic countries



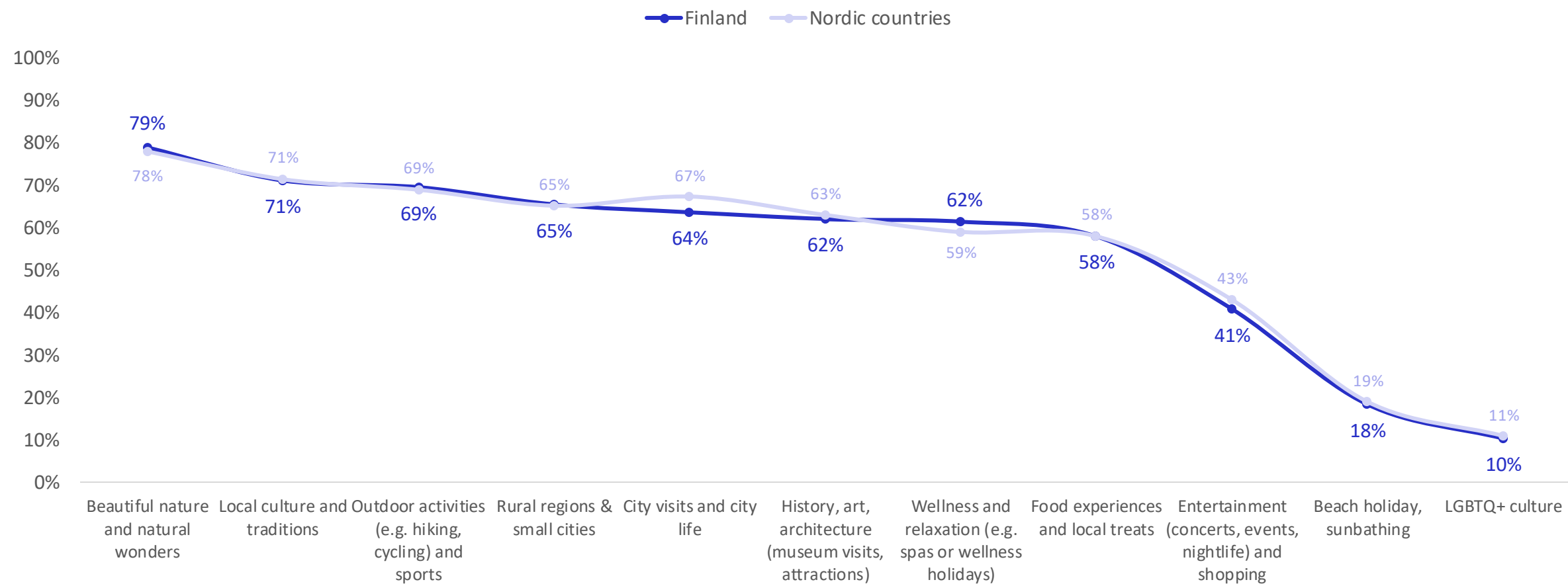
The beautiful nature theme is more closely associated with Finland, Sweden and Norway. Denmark is most associated with city visits.

Linking travel themes to Finland and the Nordic countries

					Average
Beautiful nature and natural wonders	94%	93%	93%	85%	91%
Local culture and traditions	89%	88%	91%	85%	88%
Outdoor activities (e.g. hiking, cycling) and sports	88%	85%	90%	83%	86%
Rural regions & small cities	86%	82%	85%	81%	84%
Wellness and relaxation (e.g. spas or wellness holidays)	81%	80%	84%	69%	79%
City visits and city life	81%	86%	81%	86%	83%
History, art, architecture (museum visits, attractions)	78%	81%	79%	80%	79%
Food experiences and local treats	72%	74%	75%	71%	73%
Entertainment (concerts, events, nightlife) and shopping	57%	65%	61%	66%	62%
Beach holiday, sunbathing	22%	22%	23%	22%	22%
LGBTQ+ culture	22%	26%	23%	20%	23%

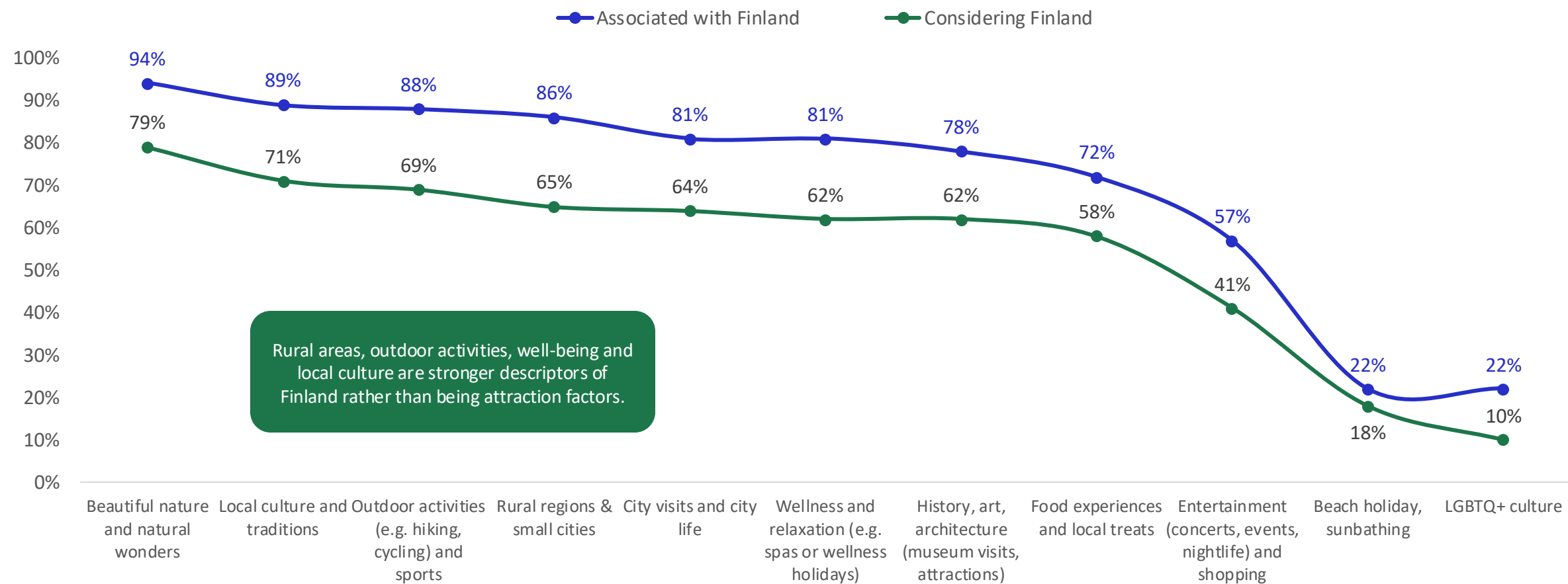
The Nordic countries are considered the most popular nature travel destination. Finland attracts slightly less interest than the other Nordic countries as an urban destination.

Attractiveness of the Nordic countries by travel theme



Finland is strongly associated with the nature tourism theme and is also perceived as an attractive nature tourism destination.

Merging and attracting travel themes, Finland



Norway is slightly more interesting than the other Nordic countries as an outdoor destination, Denmark and Norway as an urban destination.

Attractiveness of the Nordic countries by travel theme

					Average
Beautiful nature and natural wonders	79%	80%	81%	72%	78%
Local culture and traditions	71%	74%	71%	70%	71%
Outdoor activities (e.g. hiking, cycling) and sports	69%	67%	75%	66%	69%
City visits and city life	64%	65%	69%	71%	67%
Rural regions & small cities	65%	65%	67%	62%	65%
History, art, architecture (museum visits, attractions)	62%	65%	63%	62%	63%
Wellness and relaxation (e.g. spas or wellness holidays)	62%	58%	65%	52%	59%
Food experiences and local treats	58%	57%	60%	57%	58%
Entertainment (concerts, events, nightlife) and shopping	41%	46%	43%	43%	43%
Beach holiday, sunbathing	18%	18%	20%	19%	19%
LGBTQ+ culture	10%	12%	12%	9%	11%

Country image: Nordic countries

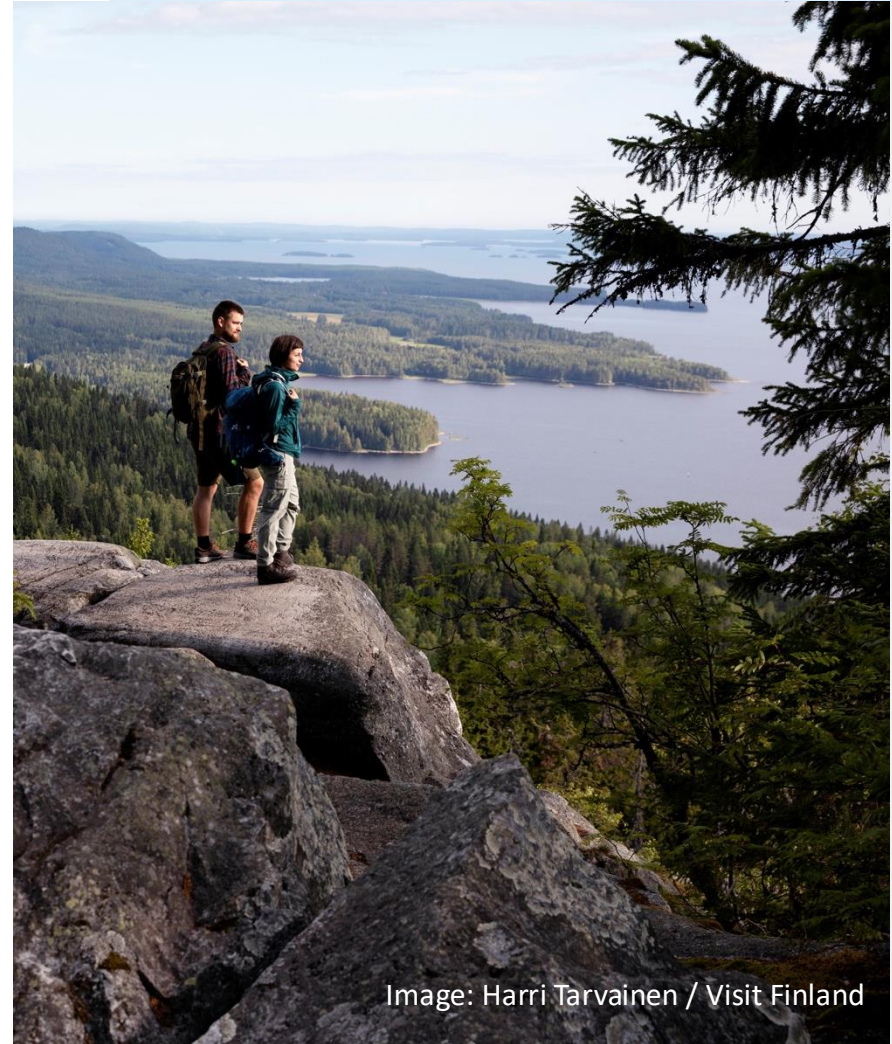
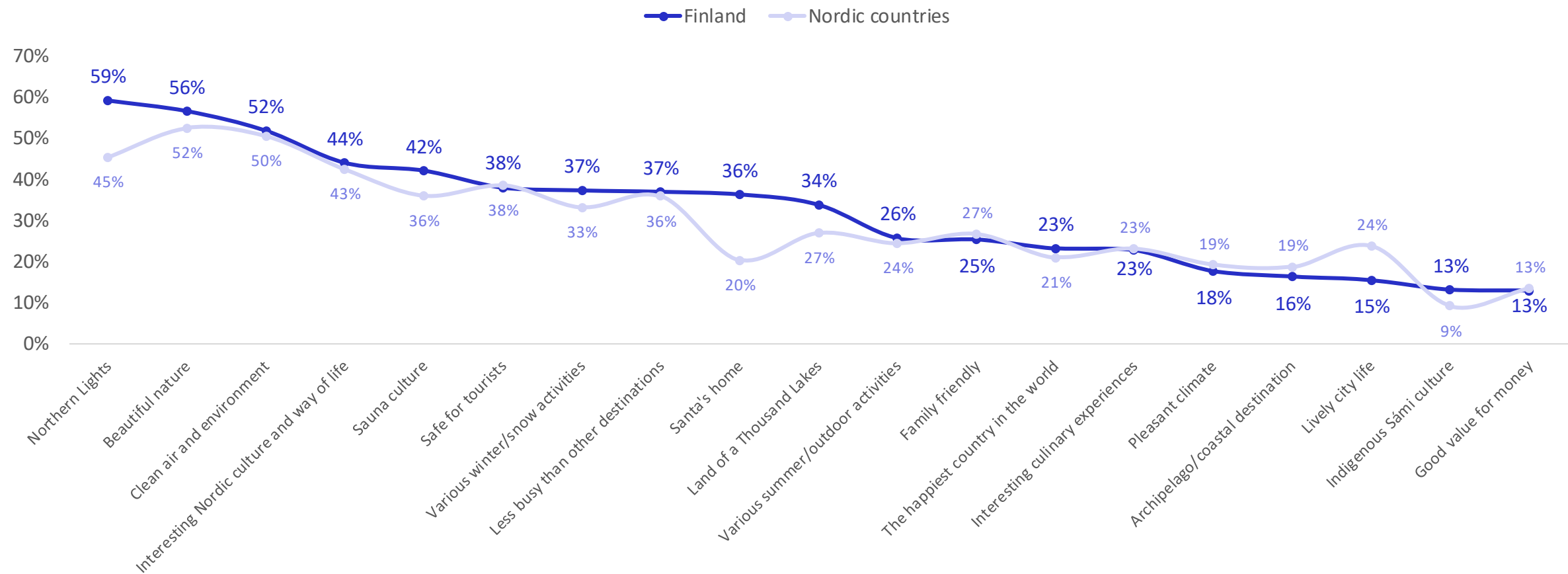


Image: Harri Tarvainen / Visit Finland

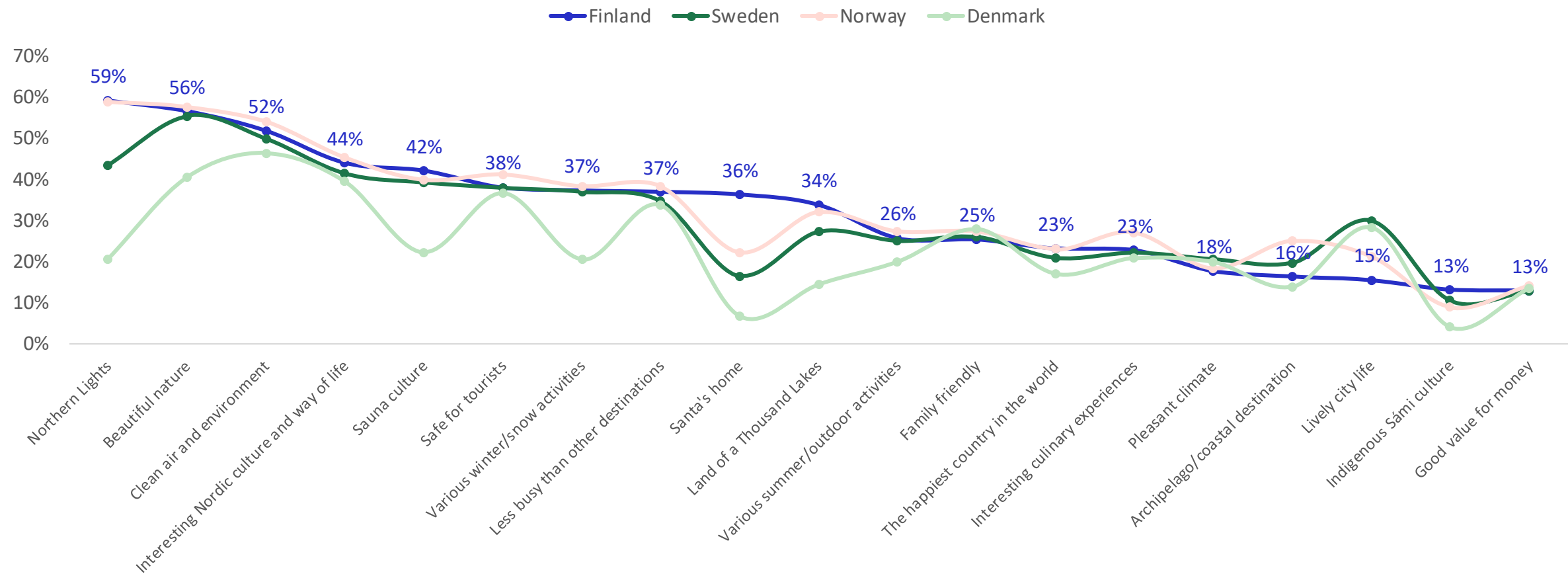
Finland's strongest images are the Northern Lights and beautiful nature. People think about the northern lights, sauna culture and Santa's home when they think about Finland more than the other Nordic countries.

Country image, Finland vs. Nordic countries



Finland and Norway are both strongly associated with the Northern Lights. Finland has a stronger association with the image of Santa Claus's home than other countries.

Country image



The most important drivers to consider Finland are Nordic culture, the image of a happy country and summer activities.

The most important attributes that drive consideration



Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- Which associations are most important for reinforcing consideration?
- What kind of image should be prioritized to boost attraction?
- What image attributes should be monitored at the strategic level in the future?

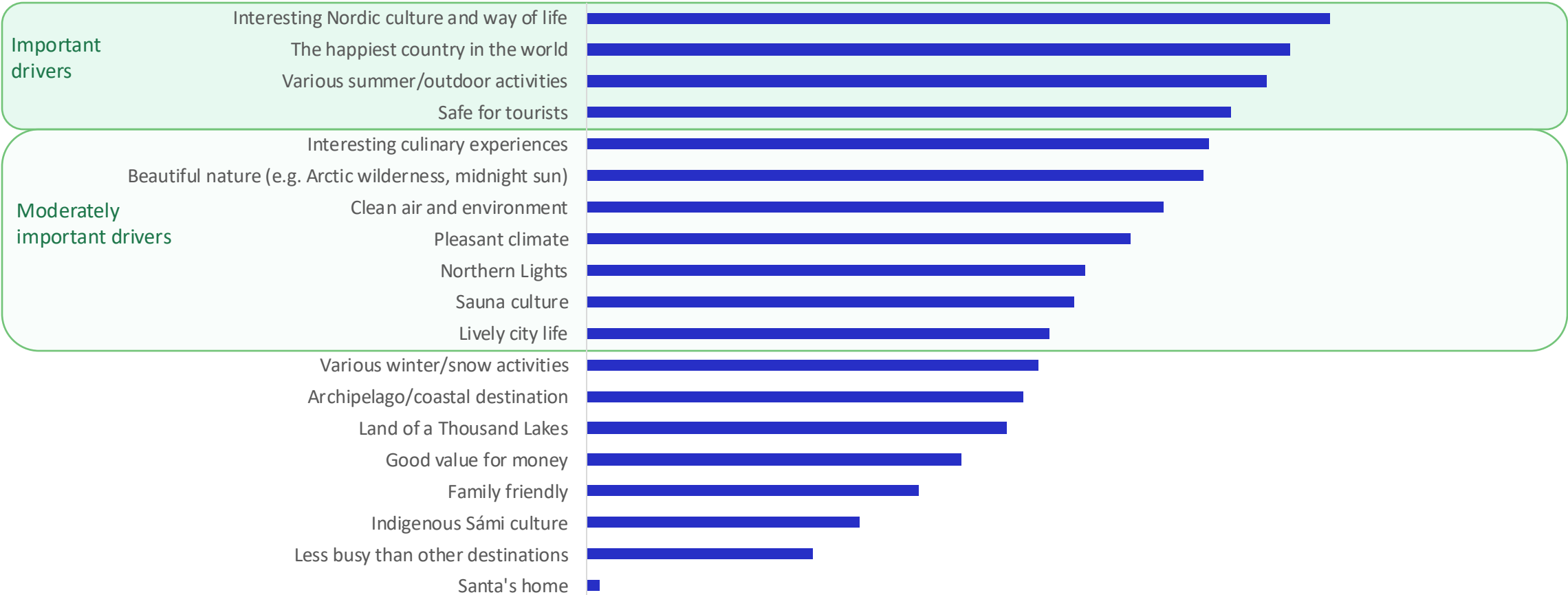
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? (Finland)/ Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

Consideration for Finland as a travel destination is most influenced by the image of Nordic culture, the image of a happy country, summer activities and security.

Drivers of consideration



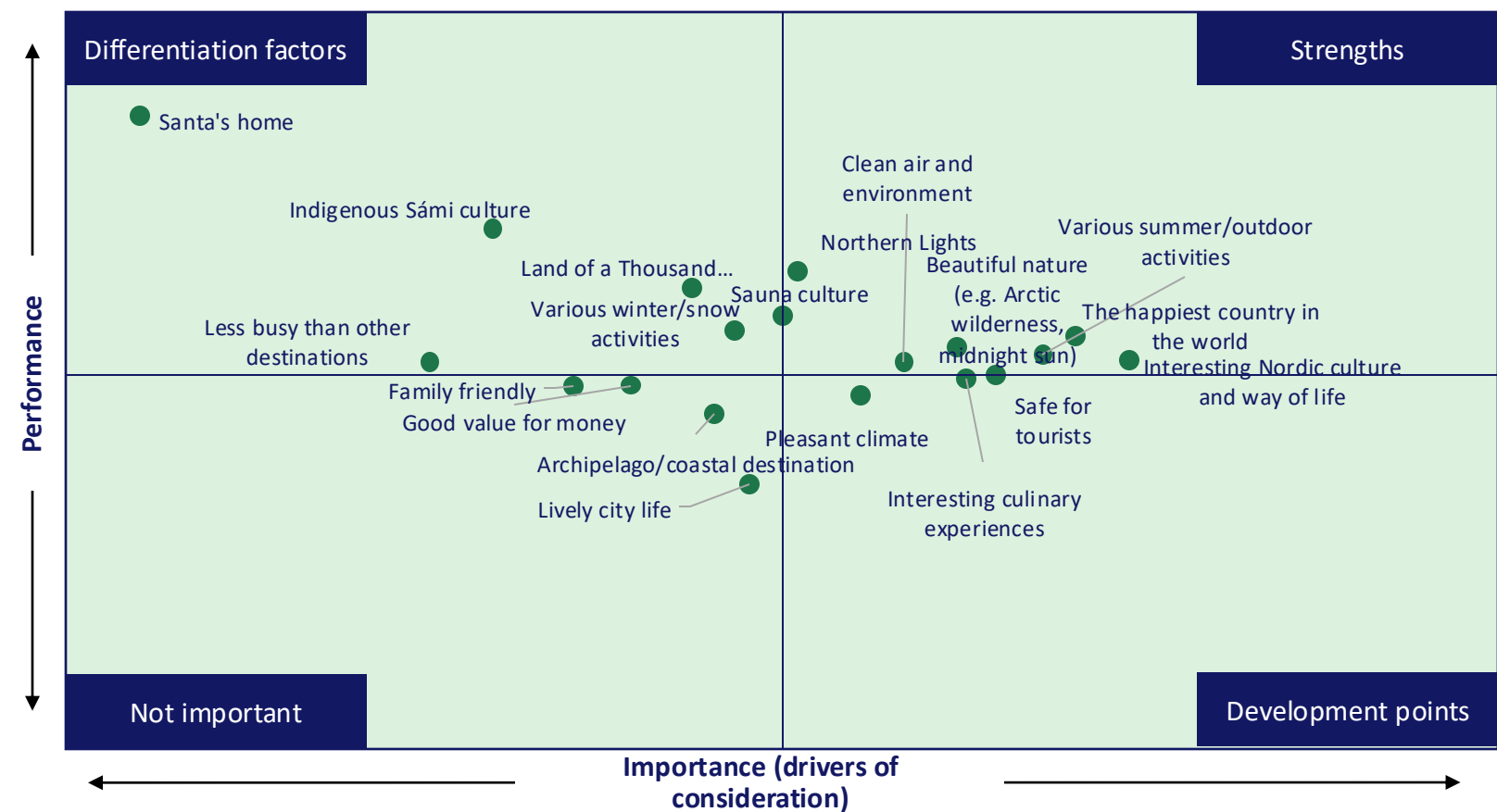
Driver analysis: Correlation between the image of the country and the consideration of the country. The higher the value, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? Which of these features do you associate with Finland as a travel destination?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

To increase the interest of French tourists, it is worth focusing on key drivers for consideration, such as communicating Nordic culture and lifestyle.

Importance vs. Performance: Country image



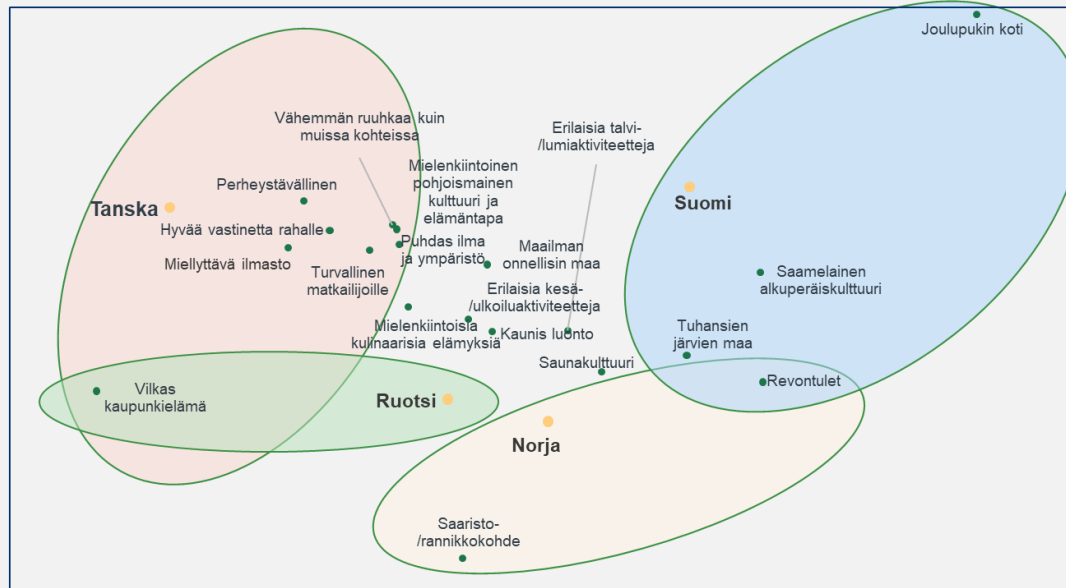
Comments

Finland performs very similarly in the most important drivers of consideration to the other Nordic countries.

Among mid-range drivers, Finland is associated with fewer *images of bustling urban life*.

In addition, Finland has a few distinctive factors that are not key drivers, but still essential to distinguish Finland's country image, such as *Santa's home and indigenous Sámi culture*.

HOW TO READ THE MIND MAP



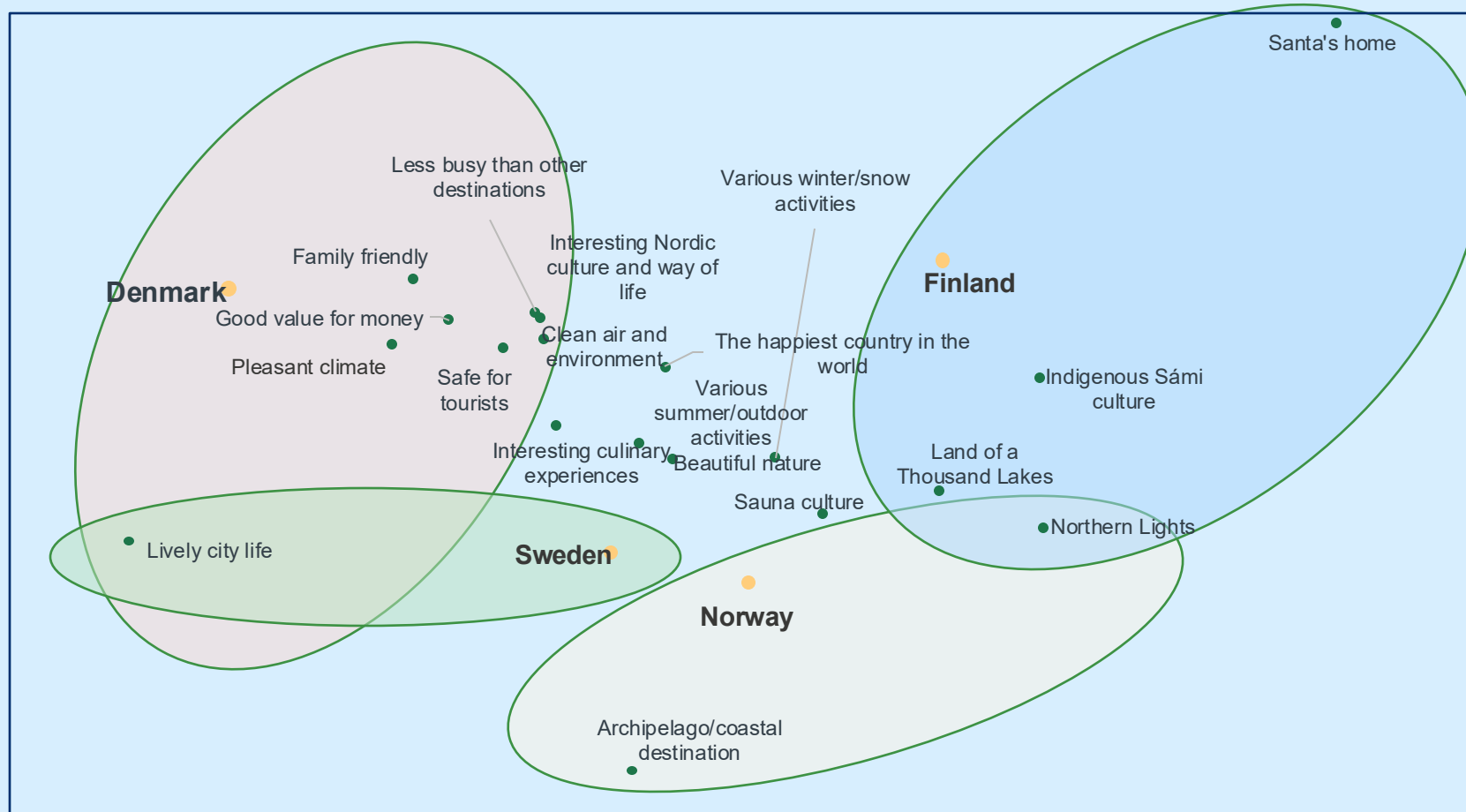
The positioning map visualises how tourists experience different countries and the images associated with them.

It can help identify how different countries and characteristics are grouped in relation to each other and which factors distinguish them from each other.

The highlights drawn on the map illustrate the relative strengths of the countries compared to other countries.

Finland's image position is unique – Finland is distinguished from other countries especially by the home of Santa Claus.

Country image, relative image



Comments

Finland stands out most as the home of Santa Claus. The Sámi culture, the land of a thousand lakes and the northern lights are also factors that differentiate Finland a little from the other Nordic countries.

Denmark is not associated with, for example, northern lights or winter activities, so Denmark is more strongly profiled as a family-friendly city destination with a pleasant climate.

The image and attractiveness of Finnish food



Image: Soili Jussila / Vastavalo / Visit Finland

The French image of Finnish food is strongly related to fish, especially salmon.

Spontaneous impression of Finnish cuisine

- **Fish (especially salmon) and other seafood** are by far the most common image of Finnish food.
- Finnish food is seen as **natural, healthy, simple and fresh**, but also often unfamiliar.
- Food is combined with cuisine that is **Nordic, rustic and close to nature**.
- Versatility and spiciness are not part of the general perception – food is often perceived as **mild and simple**.
- **Curiosity** and the desire to try Finnish food are common, although **knowledge is limited**.

"Good for health"

"Very nice natural products"

"Traditional and natural cuisine"

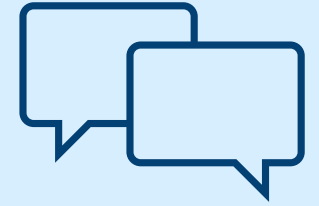
"I know very little. For me, it's based on fish."

"Cuisine is based on fresh fish and black bread"

"I don't know it well enough to have very strong ideas, but my preconception about Nordic cuisines is that they are quite versatile and not necessarily very tasty"

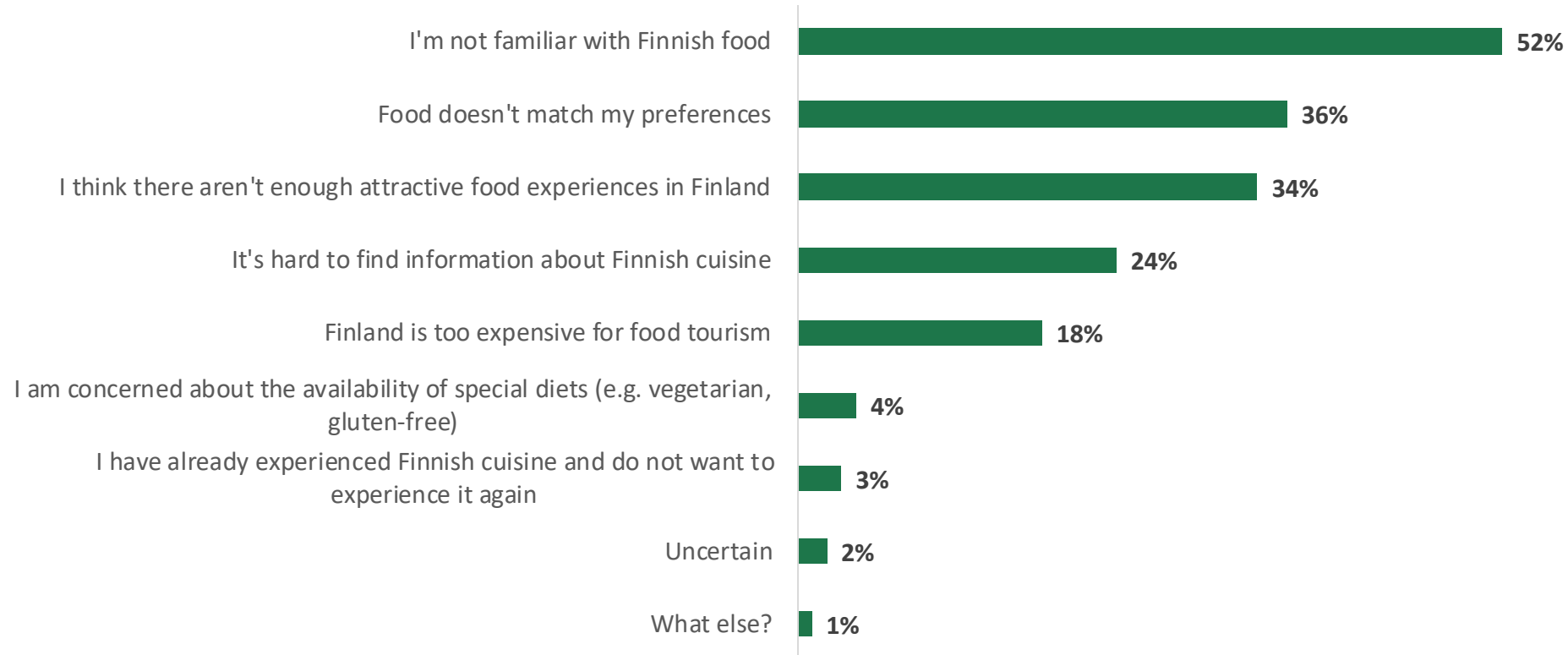
"Specialties are fish, berries, reindeer"

"I have no idea"



The barrier for food tourism in Finland is the unfamiliarity with and attractiveness of Finnish food – they think that Finnish food does not match their preferences.

Reasons why Finland is not seen as a food destination



Fish and Karelian pie are the most tried Finnish dishes

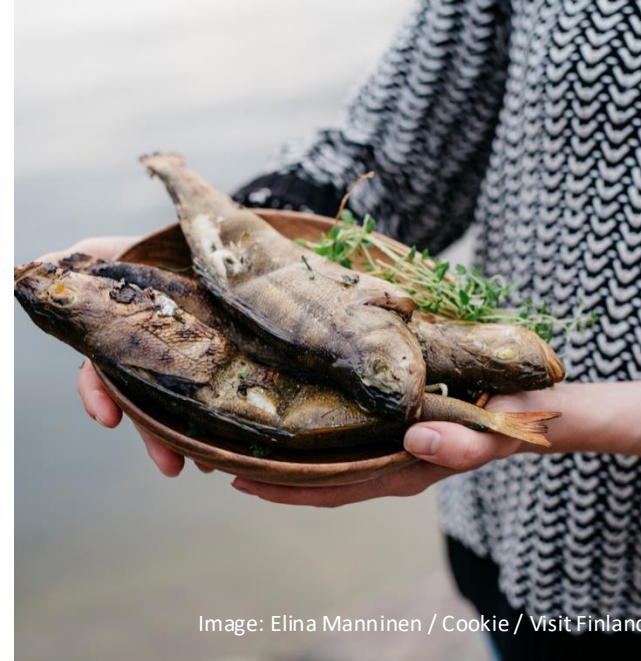


Image: Elina Manninen / Cookie / Visit Finland

Meat dishes

Reindeer meat and other game, Karelian roast, meat stew, soups



Image: Harri Tarvainen / Visit Finland

Fish and fish products

Salmon (smoked, grilled, soup), herring, kalakukko

Pastries and Finnish cheese

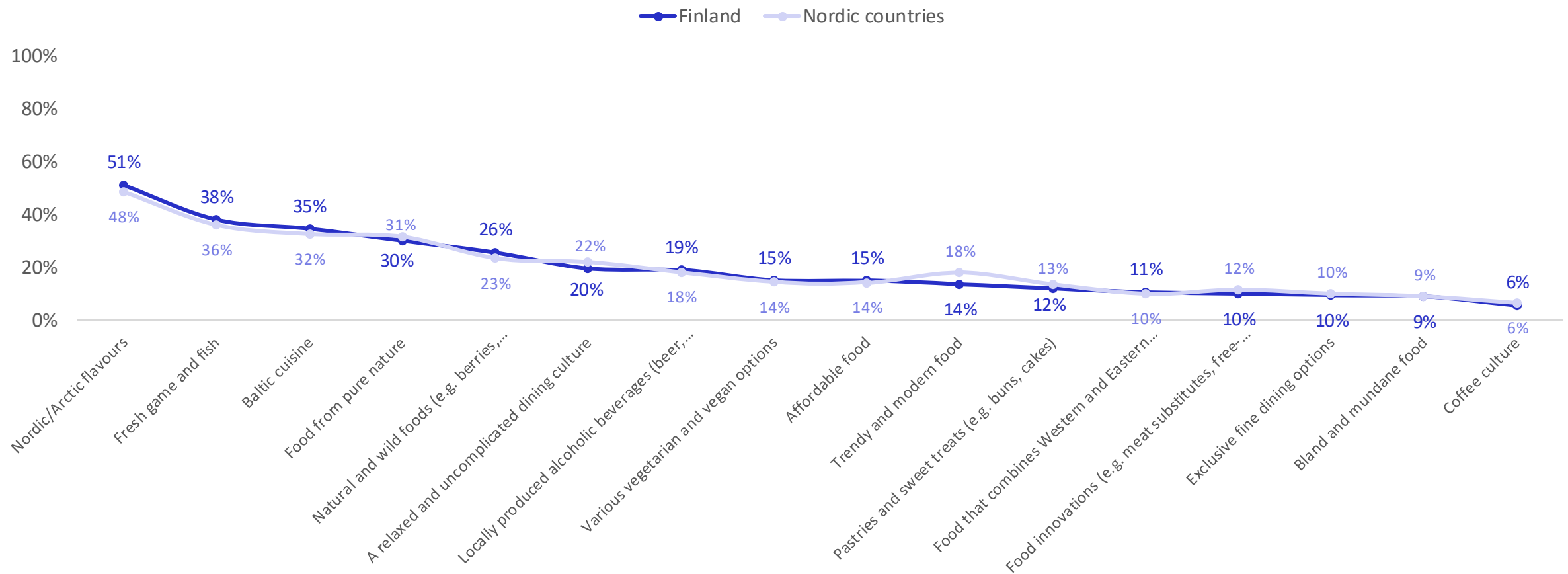
Karelian pie, buns, cinnamon pastries, Finnish cheeses

Berries and berry products

Fresh berries, juices, jams, sauces

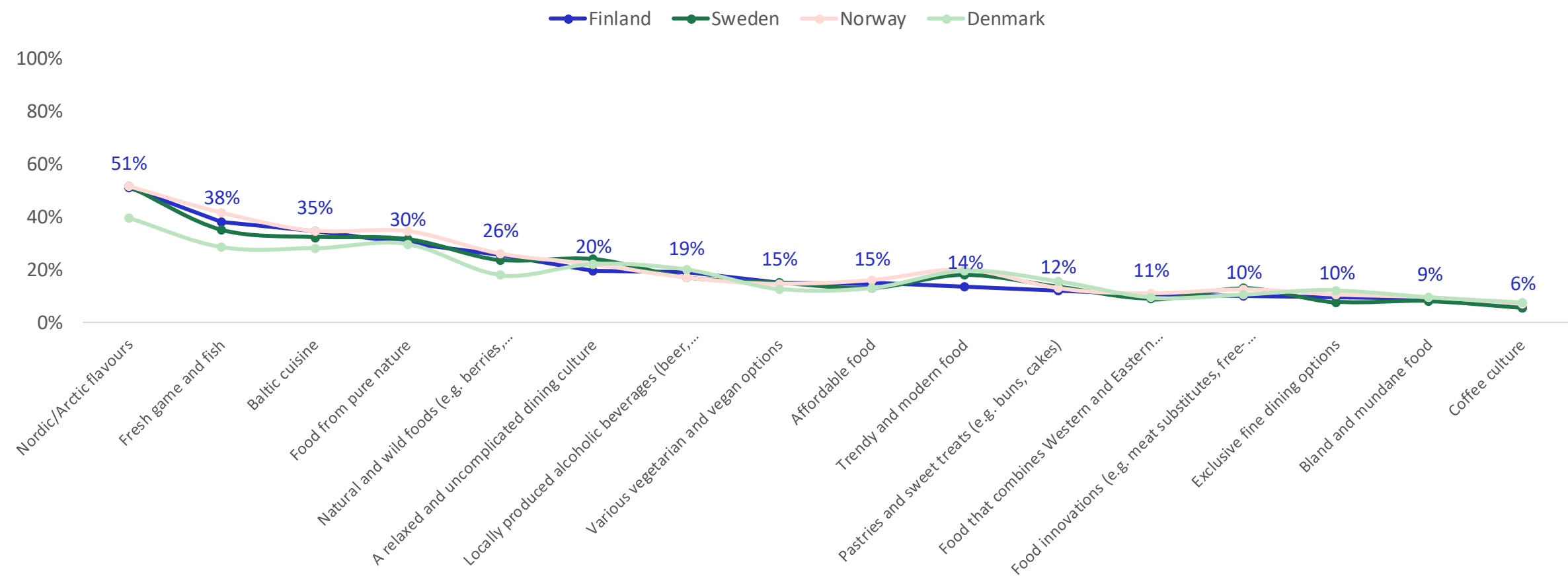
Frenchmen associate Finland and also the other Nordic countries most with the Nordic/Arctic flavour world. Finland's image is practically no different from other Nordic countries.

Food image



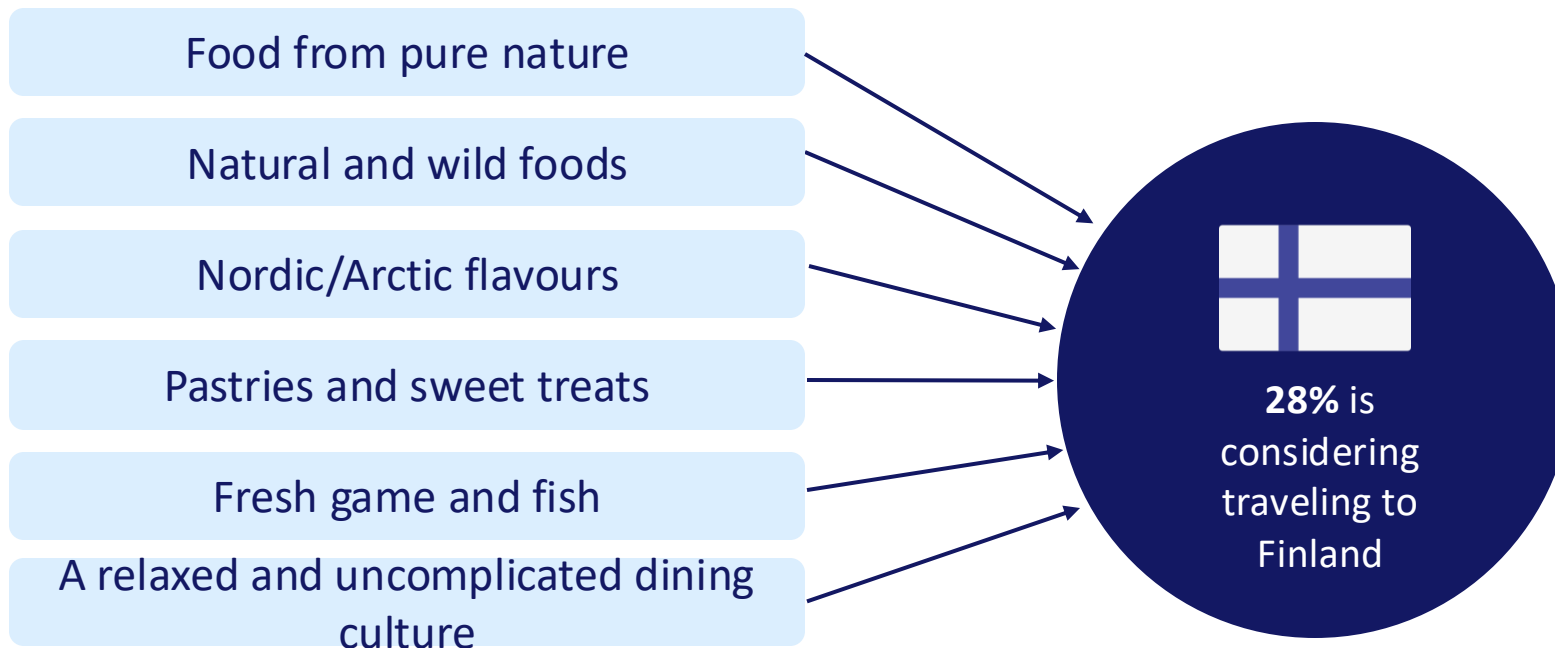
Frenchmen do not see significant differences in the Nordic food image. The Nordic flavour world is connected to all markets.

Food image



The key drivers of considering Finland are the image related to pure, natural food.

The most important attributes that drive consideration



Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- Which associations are most important for reinforcing consideration?
- What kind of image should be prioritized to boost attraction?
- What image attributes should be monitored at the strategic level in the future?

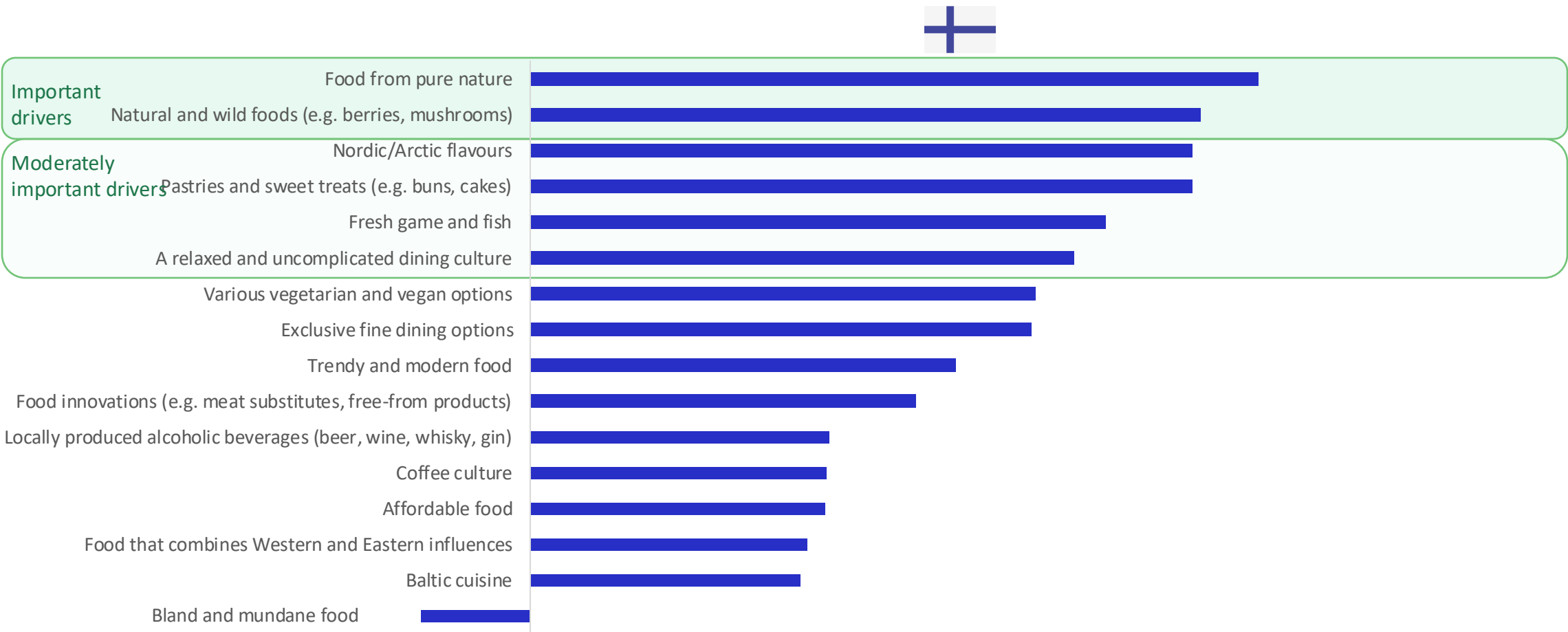
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? (Finland)/ Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

In addition to natural food, Nordic flavours, pastries and fresh game, as well as fish, are essential drivers for consideration.

Drivers of consideration



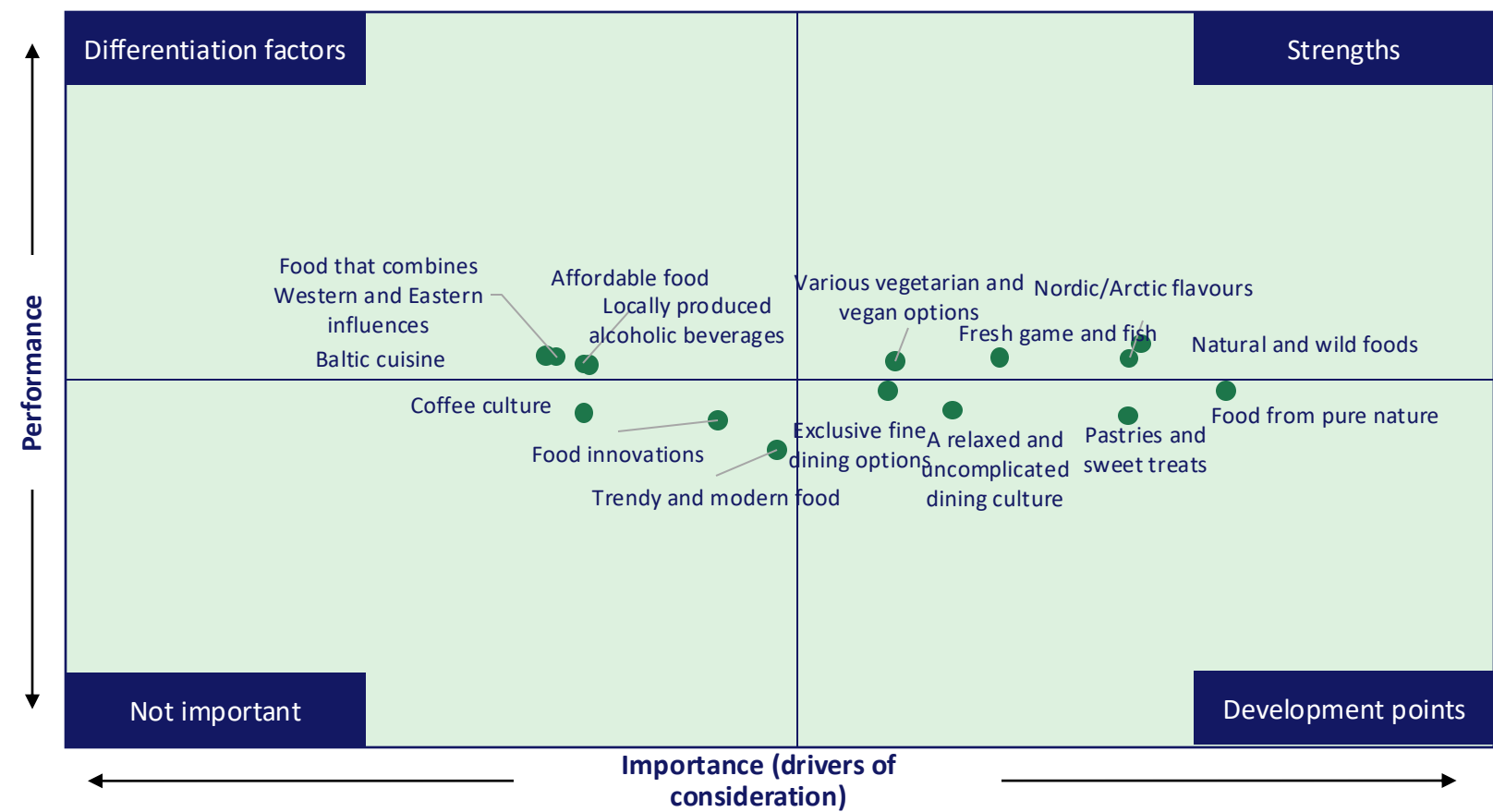
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? (Finland)/ Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

In the most important drivers of food tourism, Finland is on the same level as the other Nordic countries.

Importance vs Performance: Food image

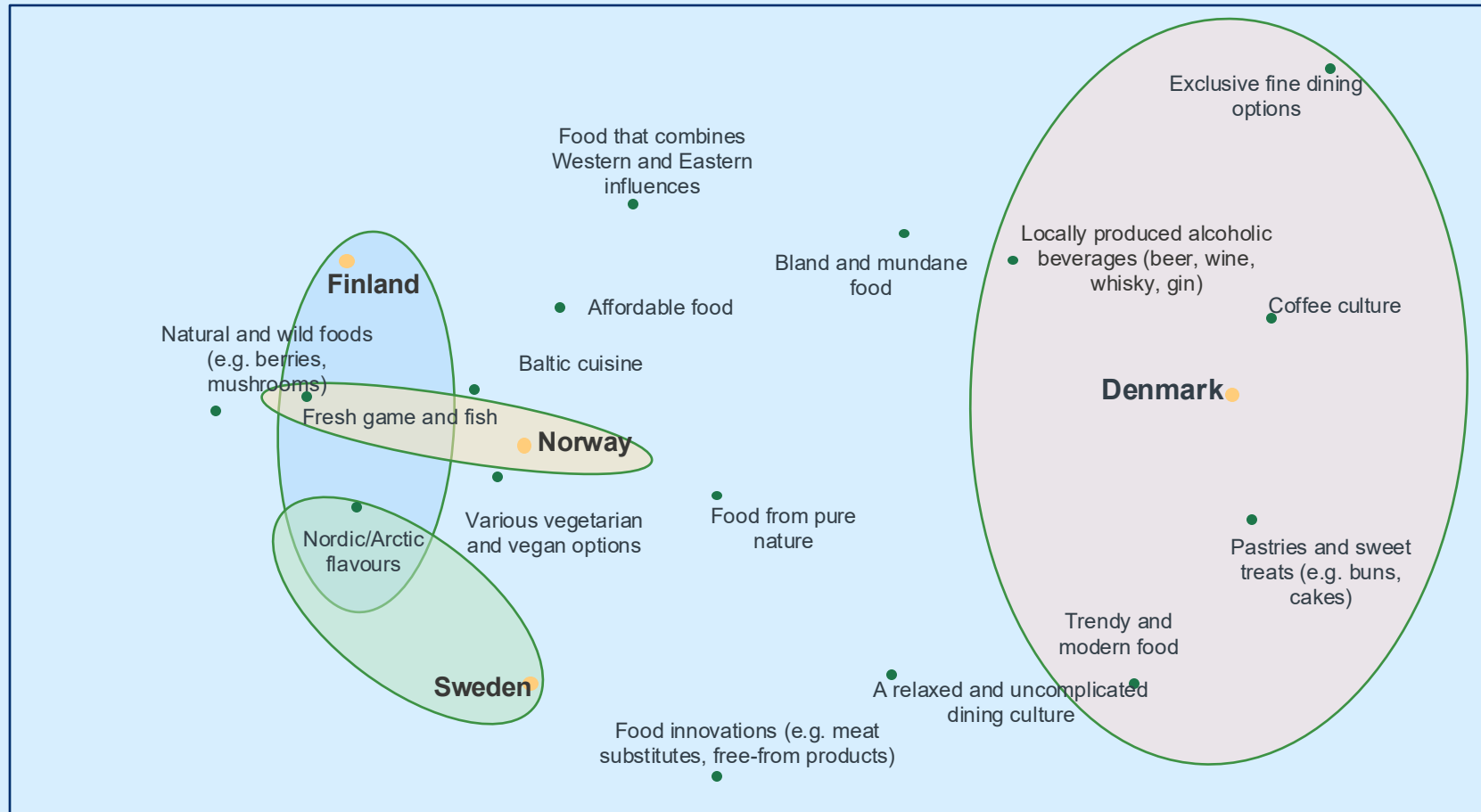


Comments

Finland does not stand out positively or negatively from other Nordic countries. In the food image, we should focus developing the key drivers, such as food from pure nature, natural foods, Nordic flavours and pastries.

The food image of the Nordic countries are very similar, especially in Finland, Sweden and Norway.

Food image, relative image

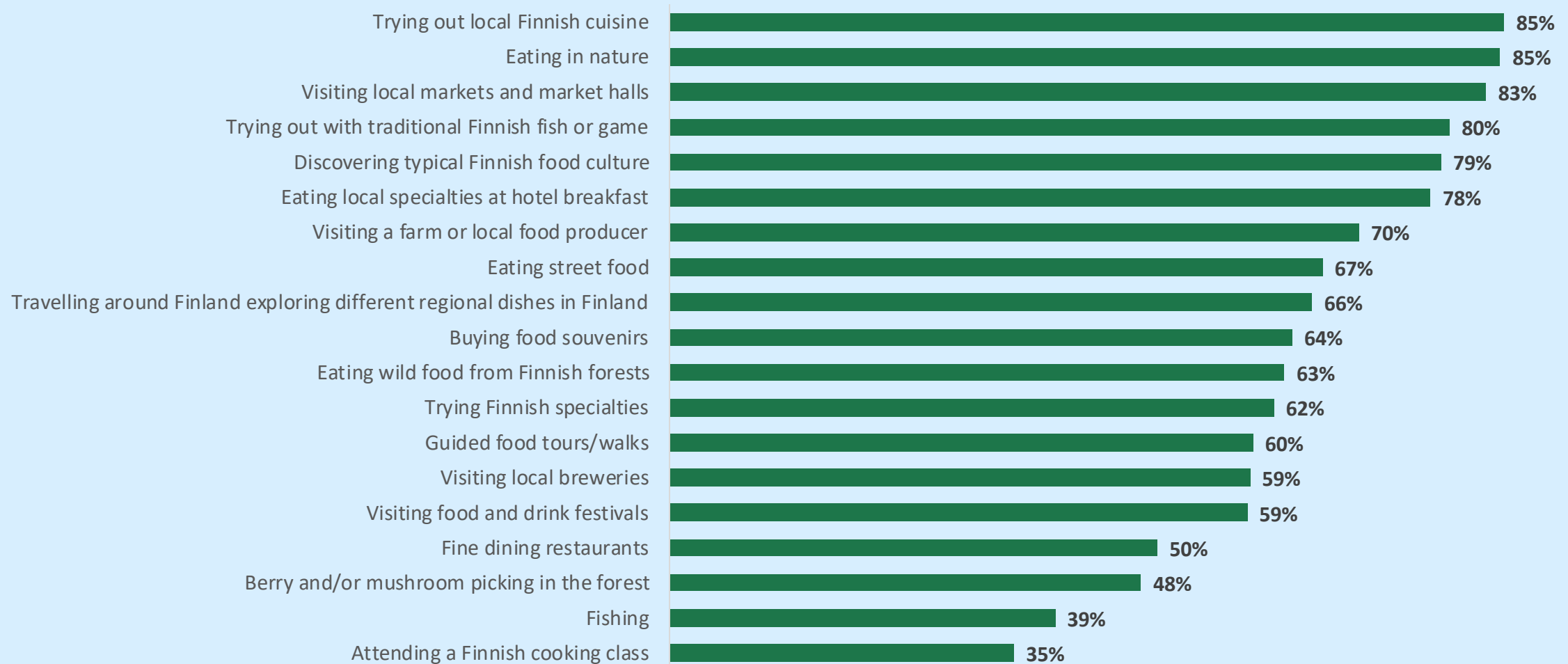


Comments

All in all, food images in the Nordic countries are very close to each other. The mind map highlights the small differences between countries.

Thus, Finland's profile is slightly more in the direction of fresh game and fish, as well as in the Nordic taste scene. The first image is also strong in Norway and the second in Sweden. Denmark stands out a little more from the other Nordic countries – its perception is slightly stronger towards coffee culture and pastries, trendy food, alcoholic beverages and fine dining.

French tourists are most likely to want to taste local food in Finland, eat in nature and visit markets/market halls.



Images of dining outdoors/in nature speak to Frenchmen the most, and the images of individual dishes speak to them the least.



1. 48%



2. 45%



3. 36%



4. 33%



5. 26%



6. 25%



7. 21%



8. 16%



9. 13%

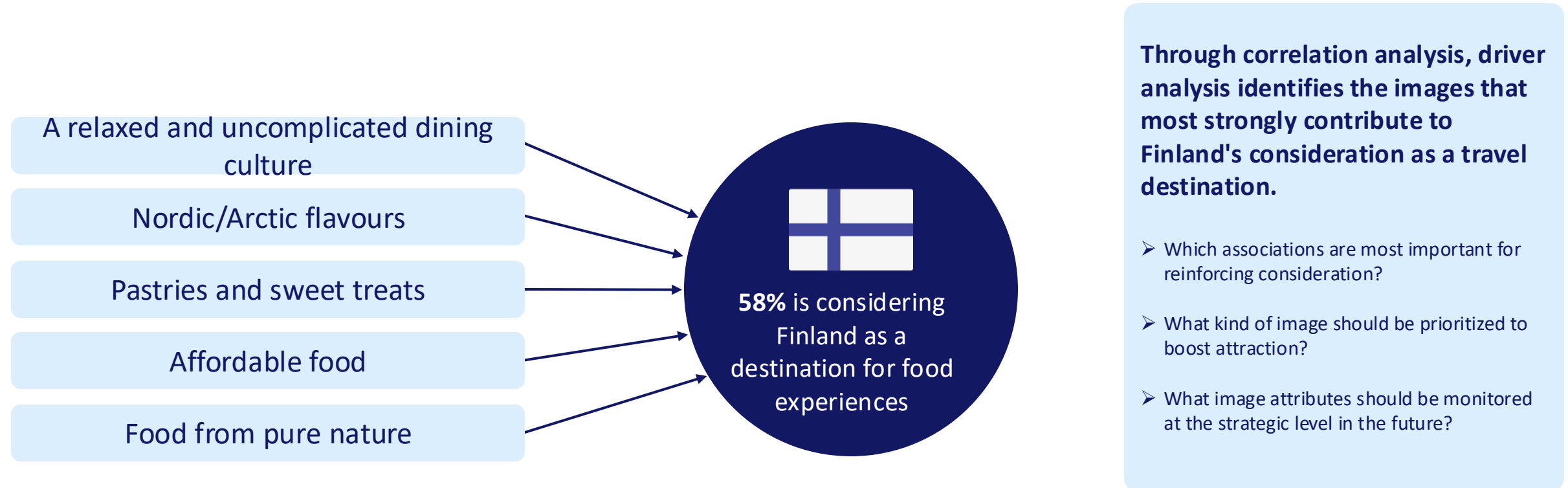
What influenced the selection of your favourite photos?

Frenchmen chose their favourite images on the grounds that they presented delicious and attractive food in a natural and peaceful environment that emphasizes togetherness, authenticity, locality and the opportunity to experience something new. The atmosphere, aesthetics and likability of the images played a significant role in their selection. Simplicity and high quality of the food came up in the responses.

Appendices

The key drivers of considering Finland are a relaxed dining culture and Nordic flavours.

The most important attributes that drive consideration of Finland as a food travel destination



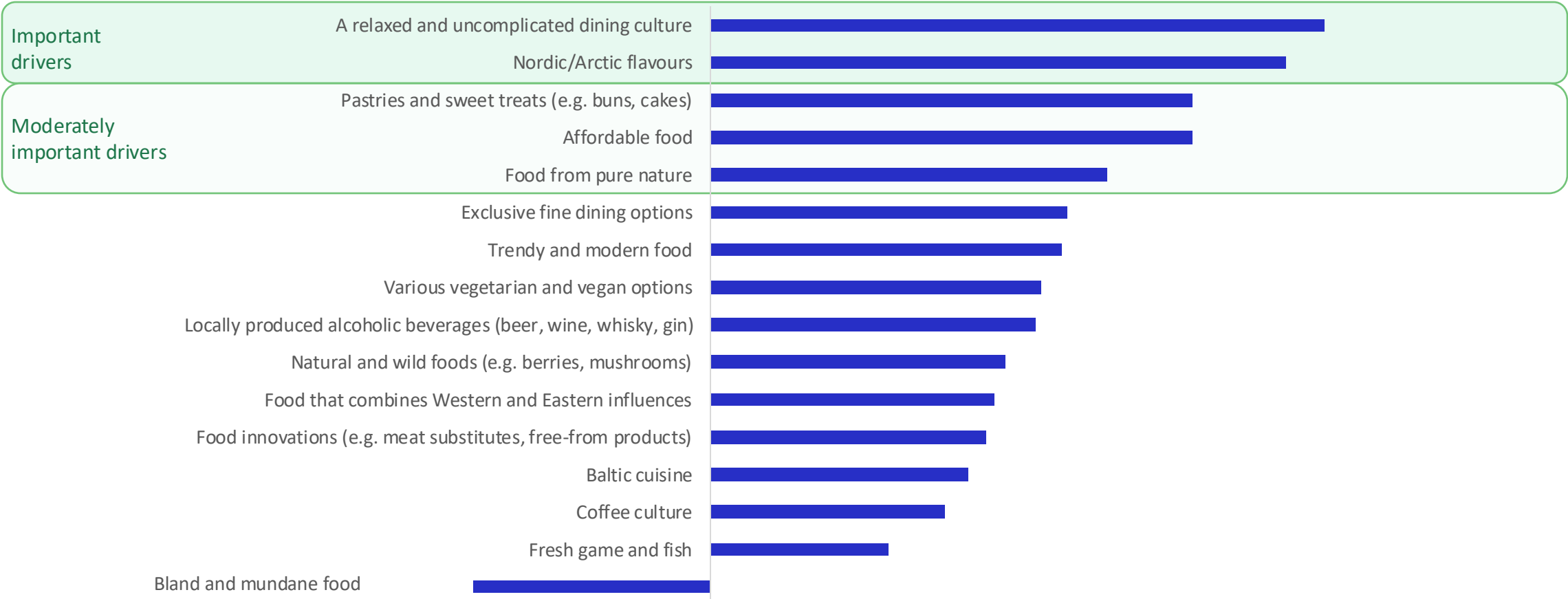
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: How likely are you to consider Finland for the following types of holidays (Food Experiences and Local Delicacies)? Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1026 IP

Consideration of Finland as a food travel destination is most influenced by the image of a relaxed food culture and the Nordic flavour world.

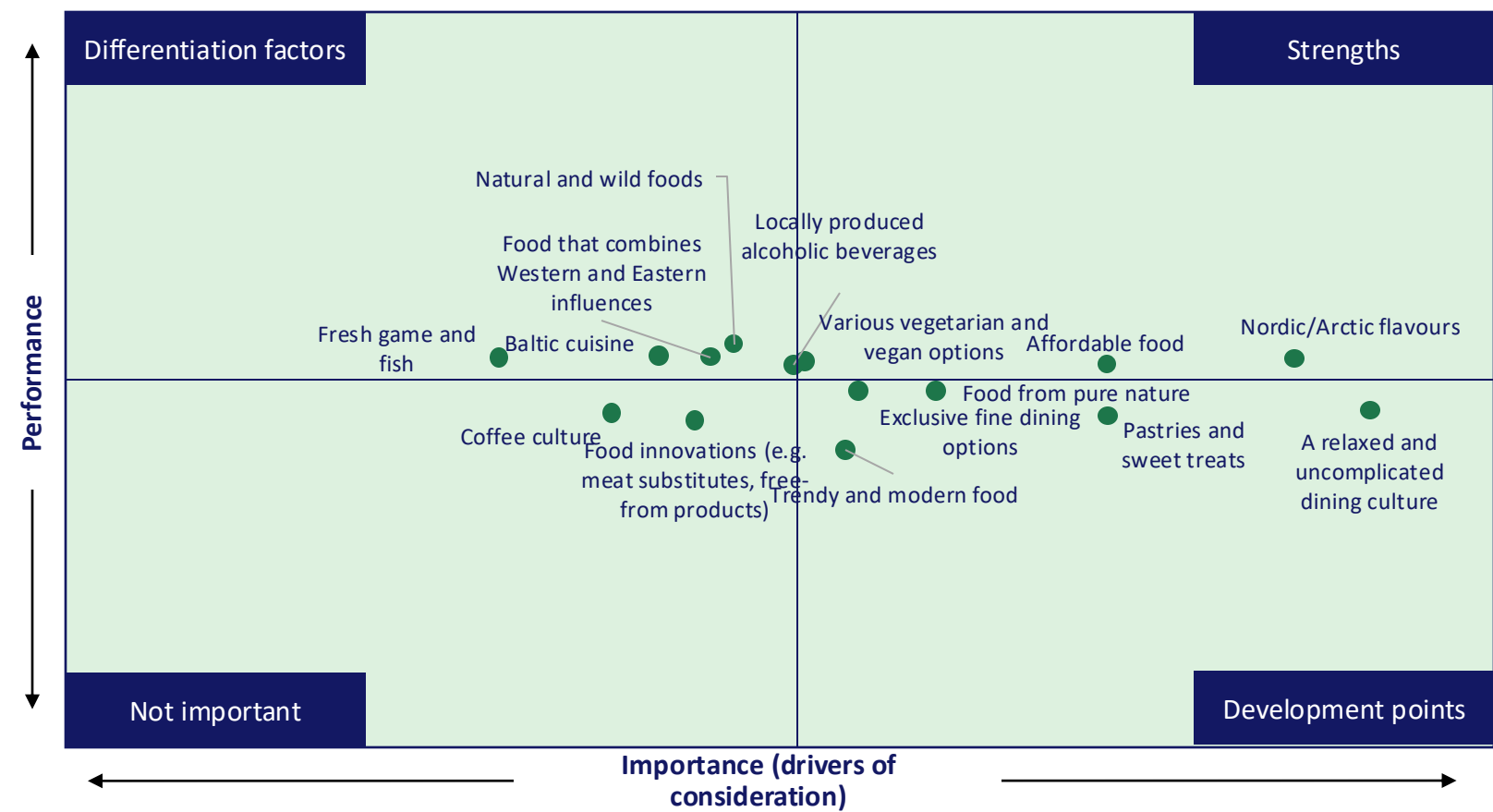
Attributes driving Finland's consideration as a food travel destination



Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.
Q: How likely are you to consider Finland for the following types of holidays (Food Experiences and Local Delicacies)? Which of these food-related topics or features do you associate with Finland?

In the most important drivers of food tourism, Finland is on the same level as the other Nordic countries.

Importance vs Performance: Food image



Comments

Finland does not stand out positively or negatively from other Nordic countries. In the food image, we should focus developing the key drivers, such as a relaxed food culture, Nordic flavours, pastries, affordability and food from pure nature.