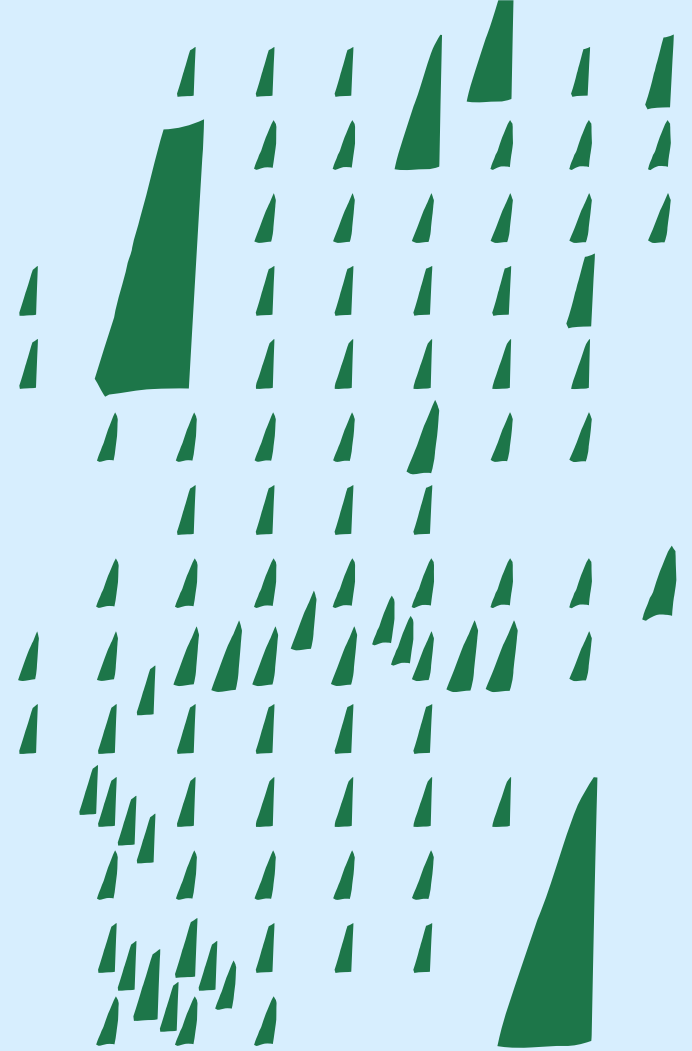


GERMANY

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

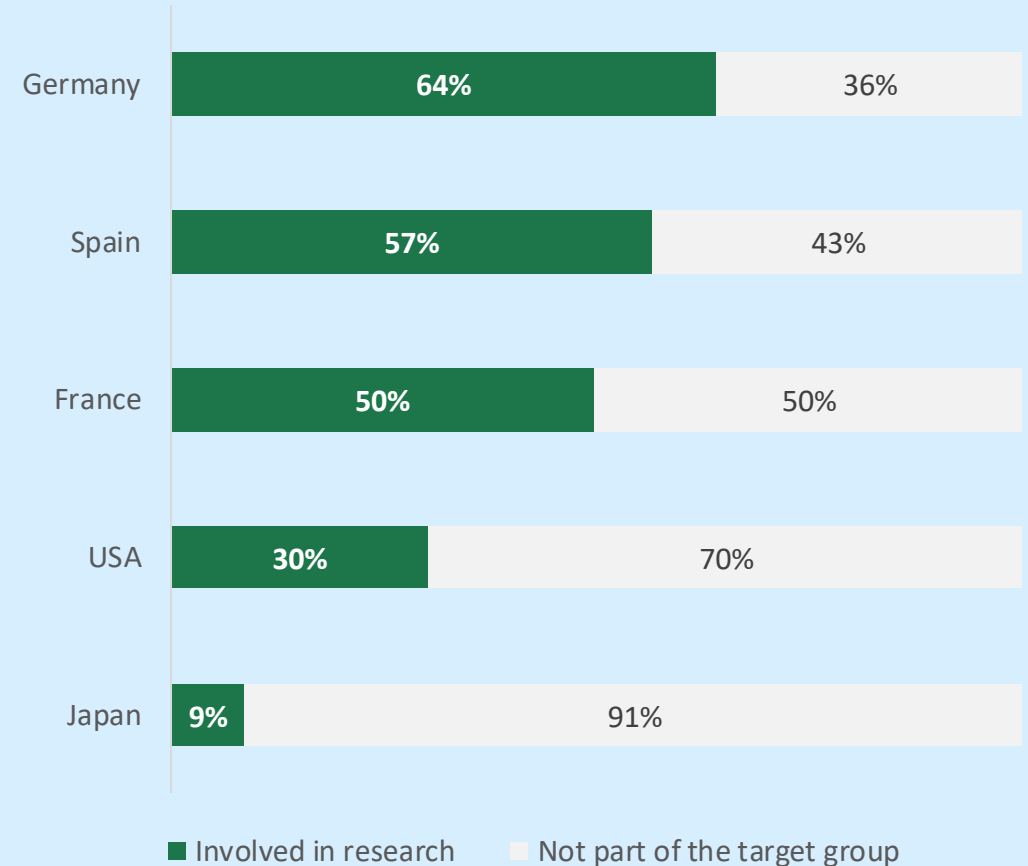
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

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



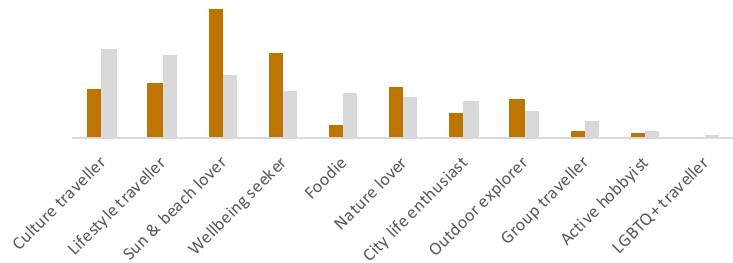
Profile card GERMANY



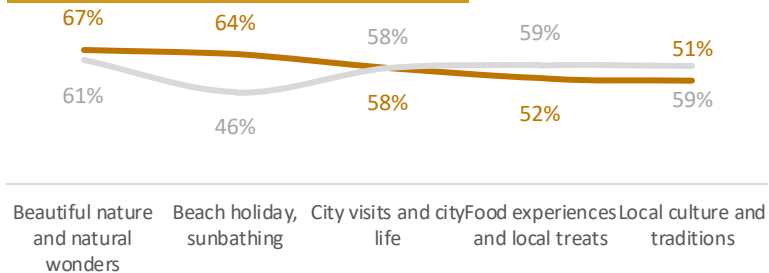
■ Saksa ■ Kaikki markkinat



SEGMENTS



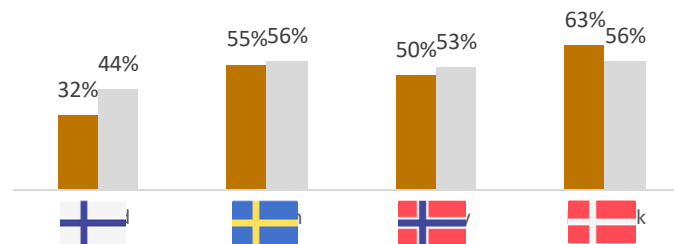
THE MOST INTERESTING TRAVEL THEMES



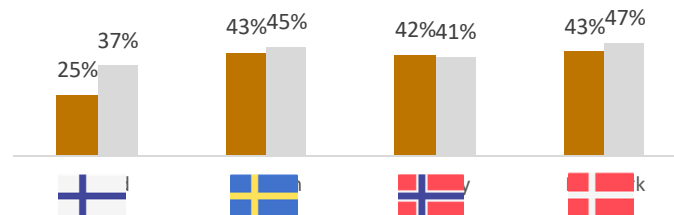
THE ATTRACTIVENESS OF FINLAND AS A FOOD TOURISM DESTINATION



AWARENESS OF THE NORDIC COUNTRIES



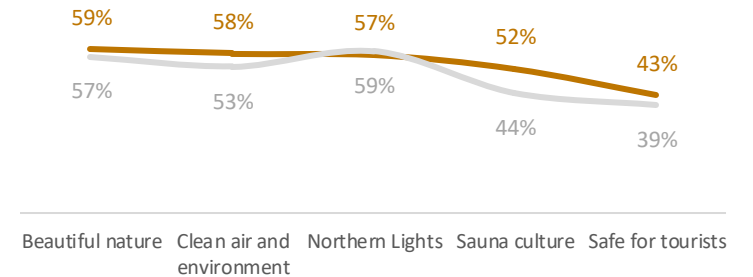
CONSIDERATION OF THE NORDIC COUNTRIES



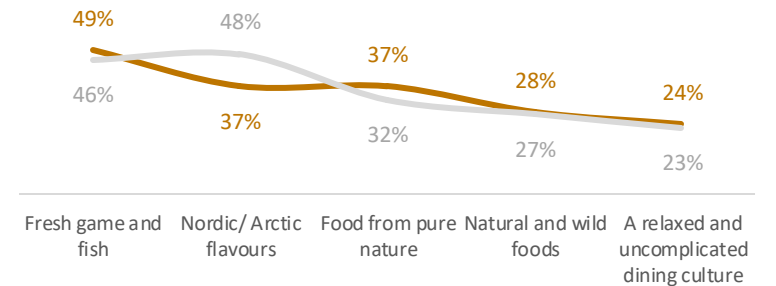
MOST IMPORTANT DRIVERS OF CONSIDERATION FOR FINLAND



TOP 5 COUNTRY IMAGES OF FINLAND



TOP 5 FOOD IMAGES IN FINLAND



Summary GERMANY

GERMANS AS TOURISTS



Beautiful nature and sunbathing are the travel themes that interest German tourists the most. The main sources of information about destinations are **search engines and recommendations from friends and family**, and about a third of Germans also make use of **official travel websites**.

About a quarter of Germans have considered travelling to Finland. They know Denmark the best, which is also the most popular place to visit. Finland's reputation and consideration fall short of the other Nordic countries.

In the German imagination, Finland is best described by **beautiful nature, clean environment and northern lights, and the sauna culture**, which are what set Finland apart from the other Nordic countries. Denmark's image differs slightly from that of the other Nordic countries, as it is associated with fewer images related to nature.

The **most significant factors that influence the consideration of Finland** are **summer and outdoor activities, Nordic culture, Santa Claus, and culinary experiences**. Finland's current development targets include, in particular, images of summer and outdoor activities, as well as urban life.

RELATION TO FOOD



German tourists are particularly interested in **trying local flavors and new foods** and see food experiences as an important part of a satisfying trip. **Restaurant choice is most often spontaneous**, which is a typical way for Germans to find a place to eat.

Finnish cuisine is most reminiscent of **fish and game** and is often considered **heavy and plentiful**. Salmon and reindeer meat are the Finnish dishes that Germans most often try. Finnish cuisine, however, is **still quite unknown to many Germans**, but curiosity and a desire to try new flavours are common.

The most important drivers for those considering Finland are **casual food culture, trendy food and food from pure nature**. In the opinion of Germans, Finland's food image is very similar to that of the other Nordic countries, but in terms of relaxation and trendiness, Finland is slightly below the average of the comparison countries. In addition, pastries and sweet treats are most often associated with other Nordic countries, especially Sweden and Denmark.

GERMANS VS OTHERS



History and art interest German tourists less than tourists in the comparison countries. Entertainment and local culture are also travel themes that Germans rarely choose.

Finnish food is perceived as **heavy and rich, and this image is more pronounced among Germans than in other countries**. The drivers of German consideration emphasize the importance of a relaxed food culture and trendiness compared to other countries.

Like Japan, one of the main reasons Germans consider Finland as a travel destination is **Santa's home. Summer activities** are as much a consideration for Germans as for the French, but **beautiful nature is not nearly as strong an attraction factor for Germans** as it is for other markets.

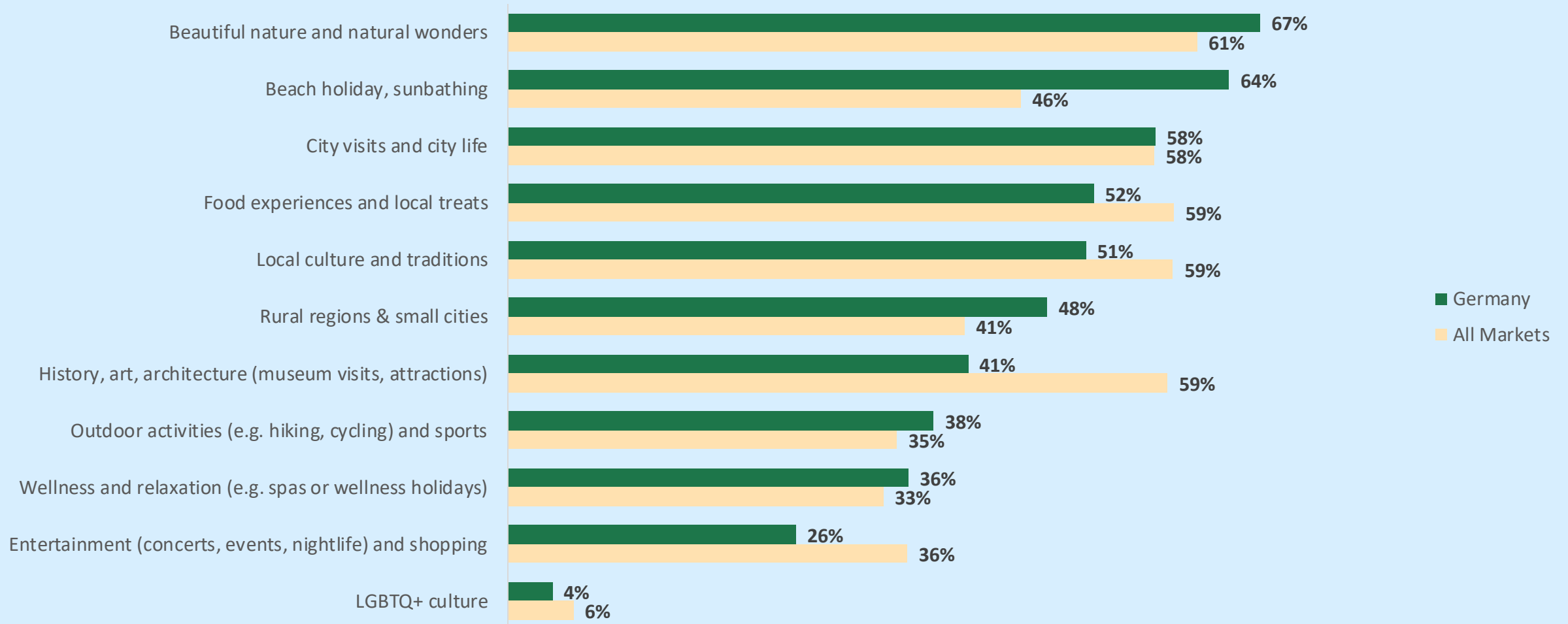
Travel behaviour & Interests



Image: Elina Manninen / Visit Finland

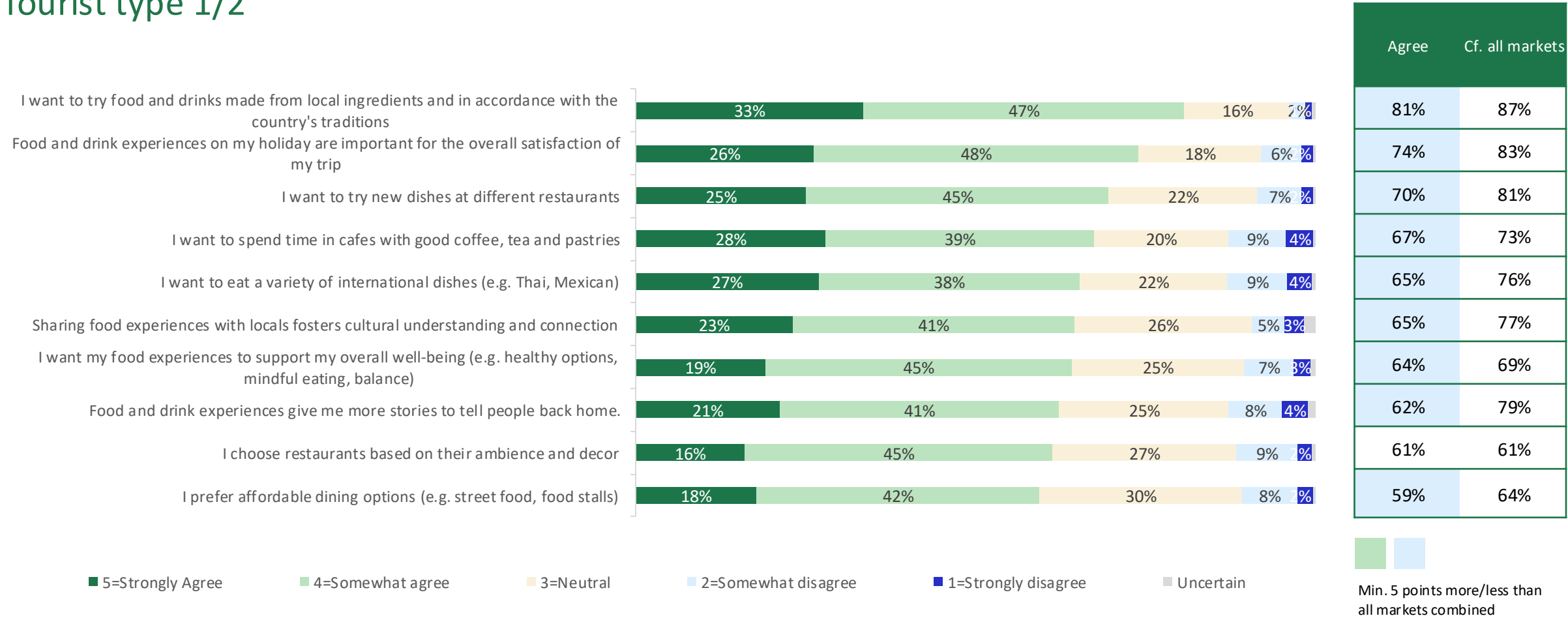
Beautiful nature and sunbathing are the most interesting travel themes for German tourists. History and art are relatively less interesting.

Travel Themes



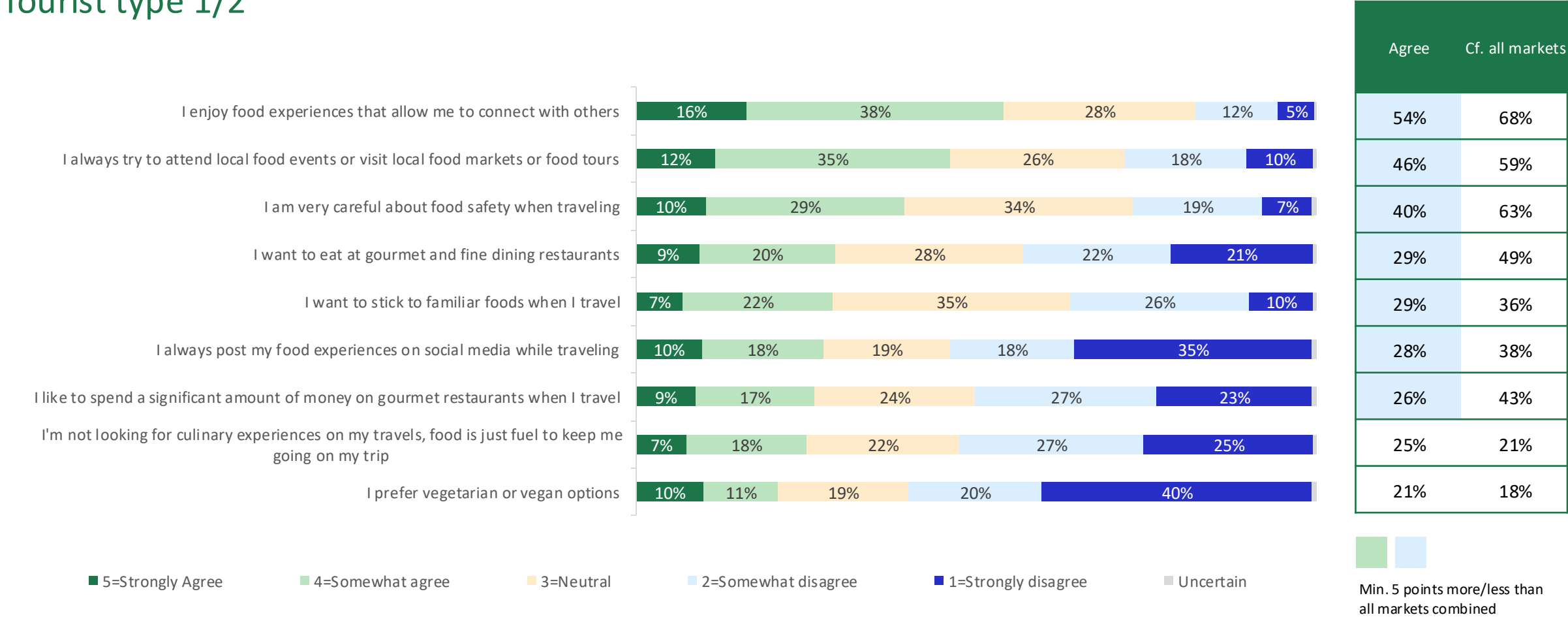
Germans are most interested in trying local flavors and new foods, and food experiences are seen as an important part of a satisfying trip.

Tourist type 1/2



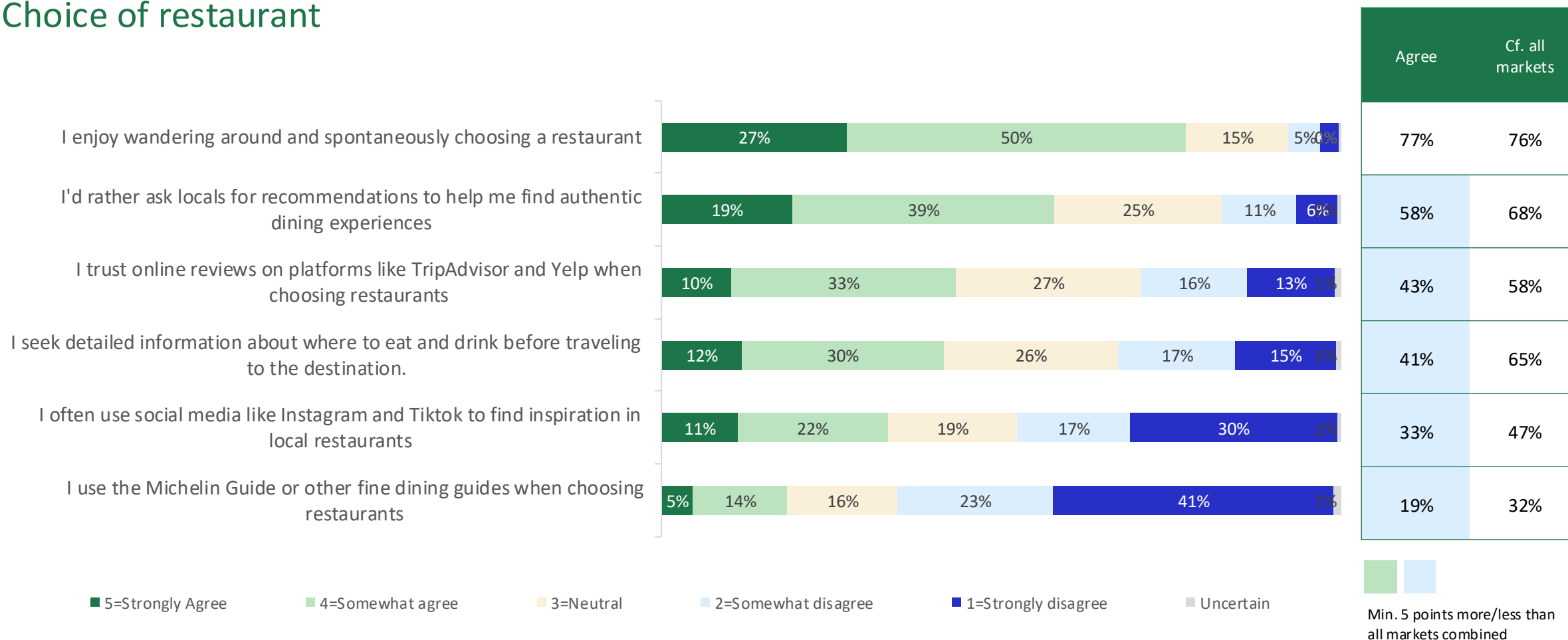
Vegetarian options and posting food experiences on social media divide opinions – a large number are not interested in these.

Tourist type 1/2



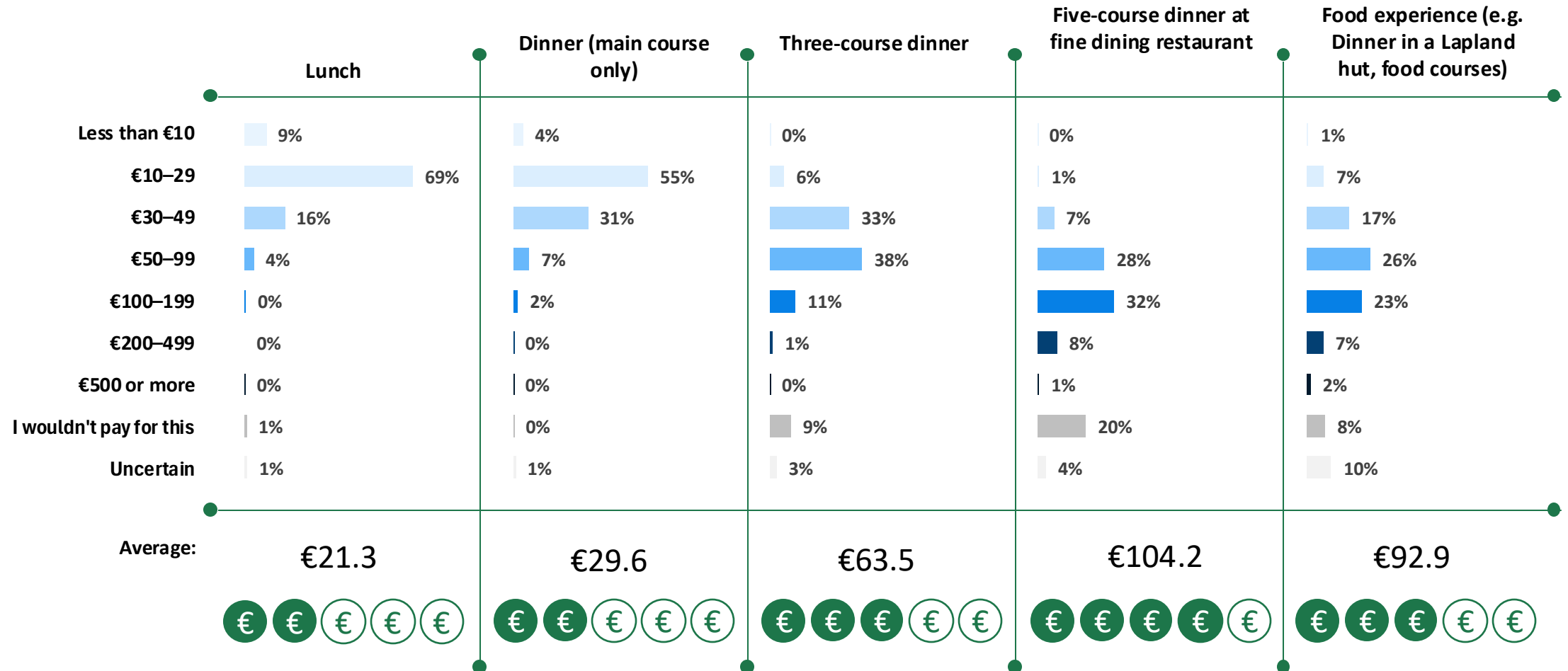
Spontaneous selection is the most typical way for Germans to find a restaurant

Choice of restaurant



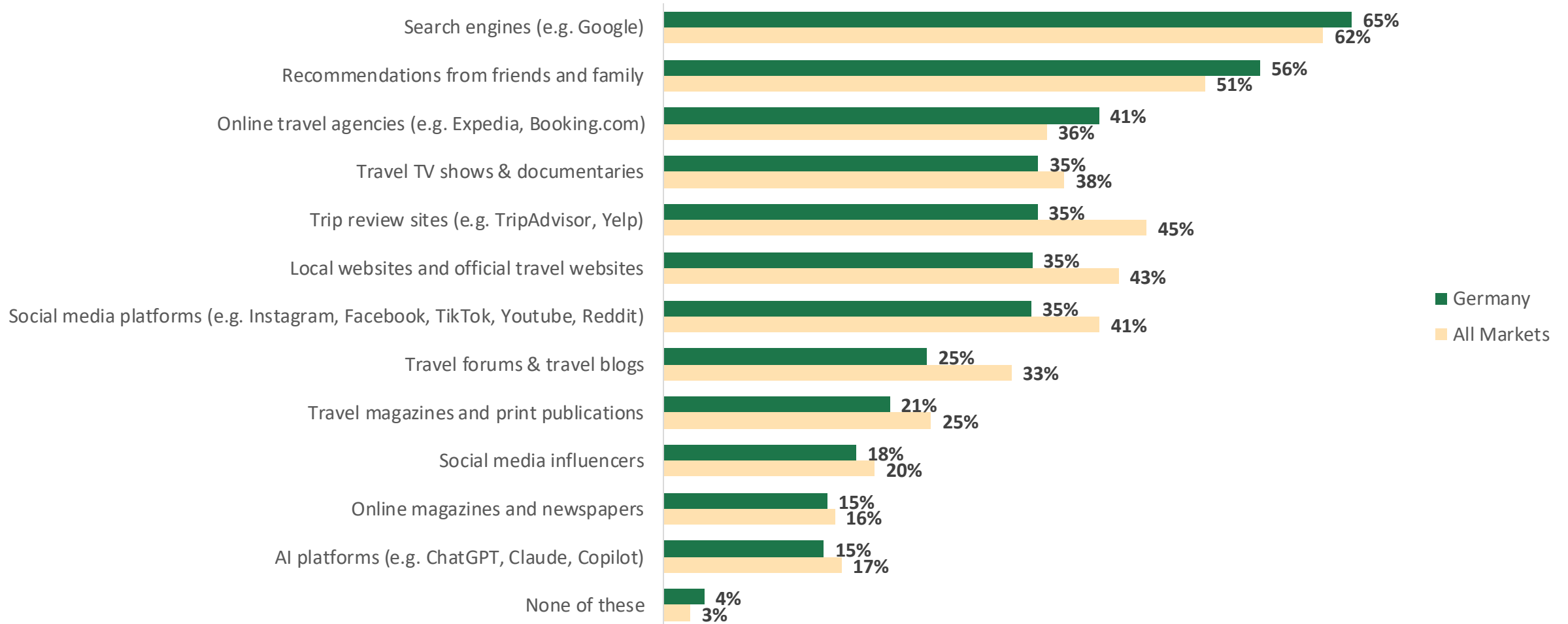
Germans are willing to pay the most for a five-course dinner and food experiences

Willingness to pay



Search engines and recommendations from friends and family are the most important sources of information about destinations. About a third of German tourists make use of official travel websites.

Sources of information



Awareness and attractiveness of destinations

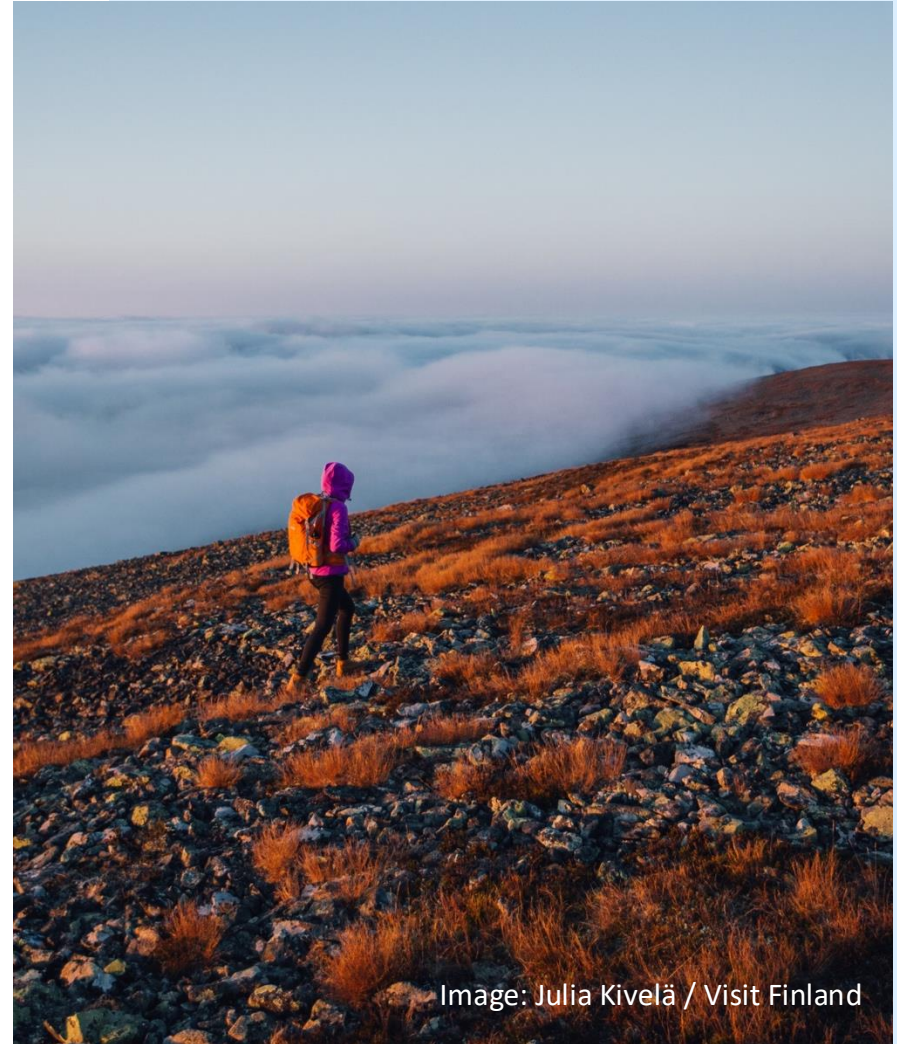
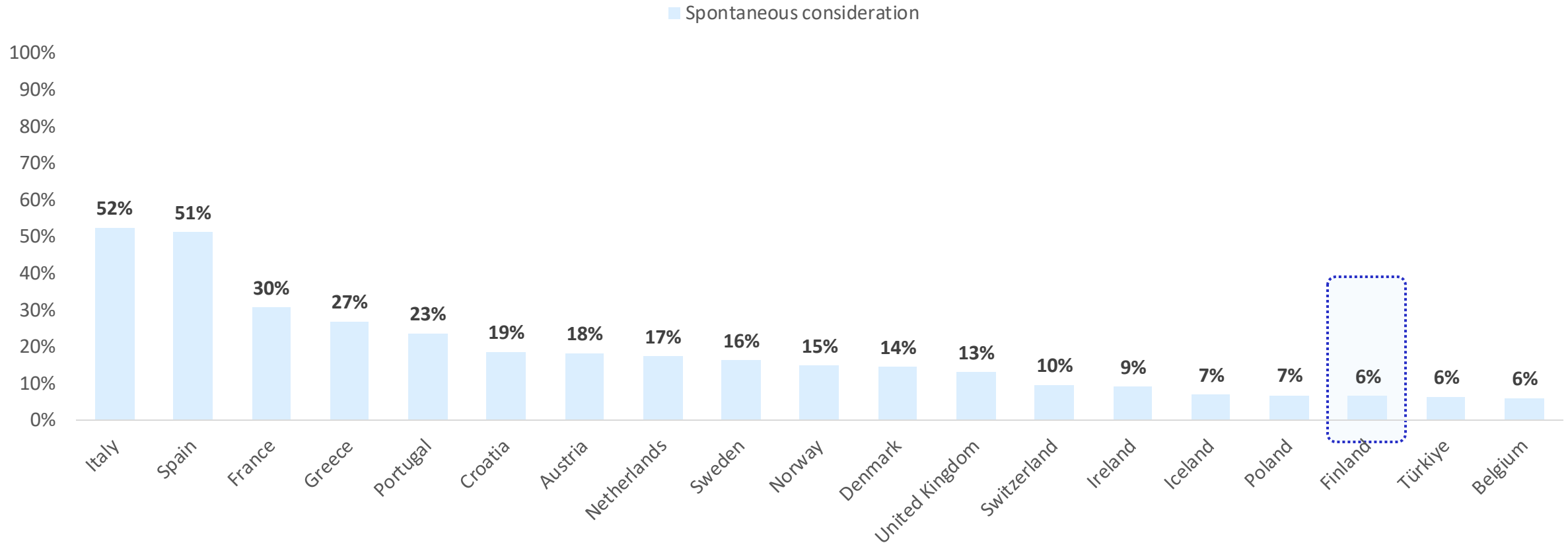


Image: Julia Kivelä / Visit Finland

Italy and Spain are the destinations in Europe that people most spontaneously choose to travel. Sweden, Norway and Denmark are mentioned more often than Finland.

Spontaneous consideration

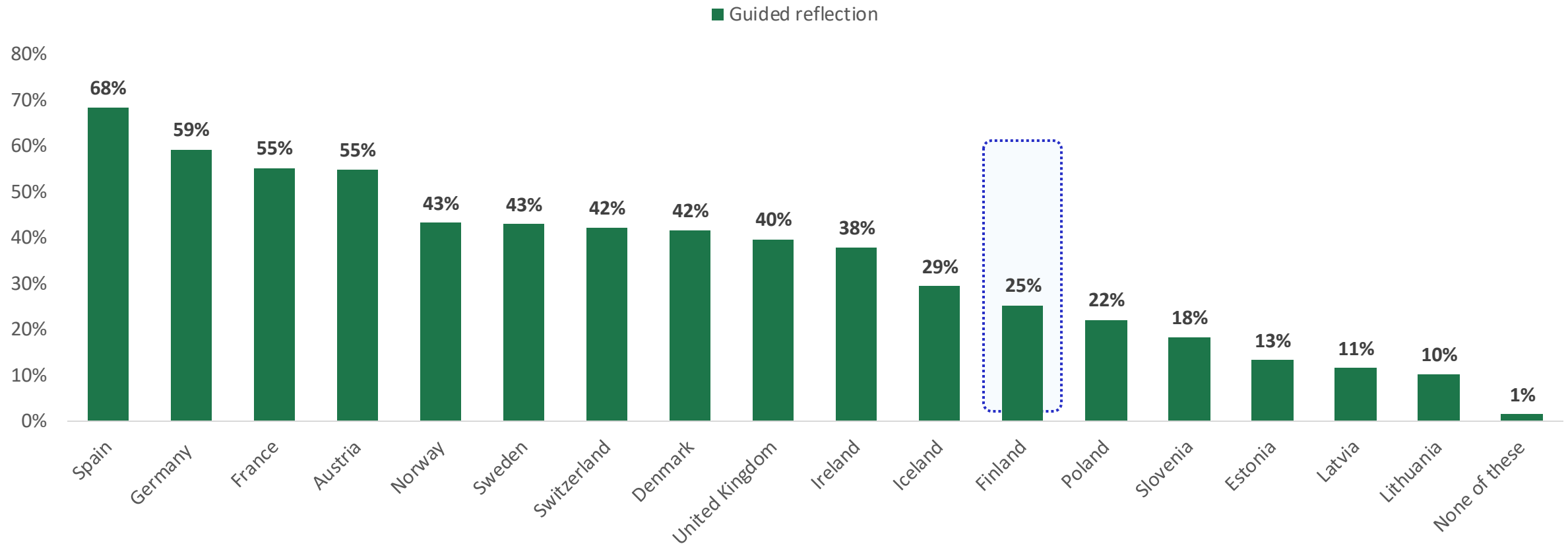


Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? (Open)

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1020 IP

Among the countries listed, Spain is the most popular travel destination. About a quarter of German tourists are considering Finland.

Guided reflection



Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? (Countries listed)
Respondents: 18–65-year-olds planning a holiday trip in the next three years 1020 IP

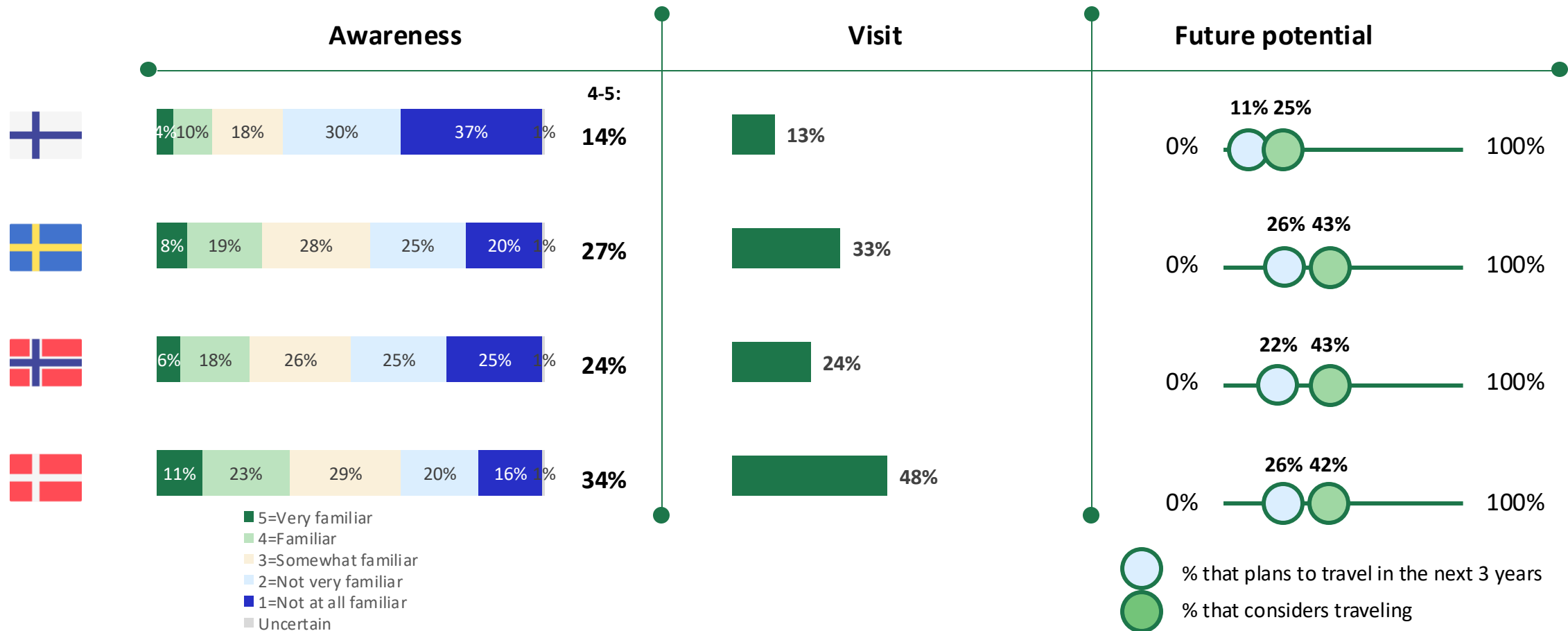
Limited knowledge is mainly why Finland is not considered as a travel destination . The high cost of the destination and the unpleasant climate are also perceived as barriers.

Obstacles of travelling to Finland



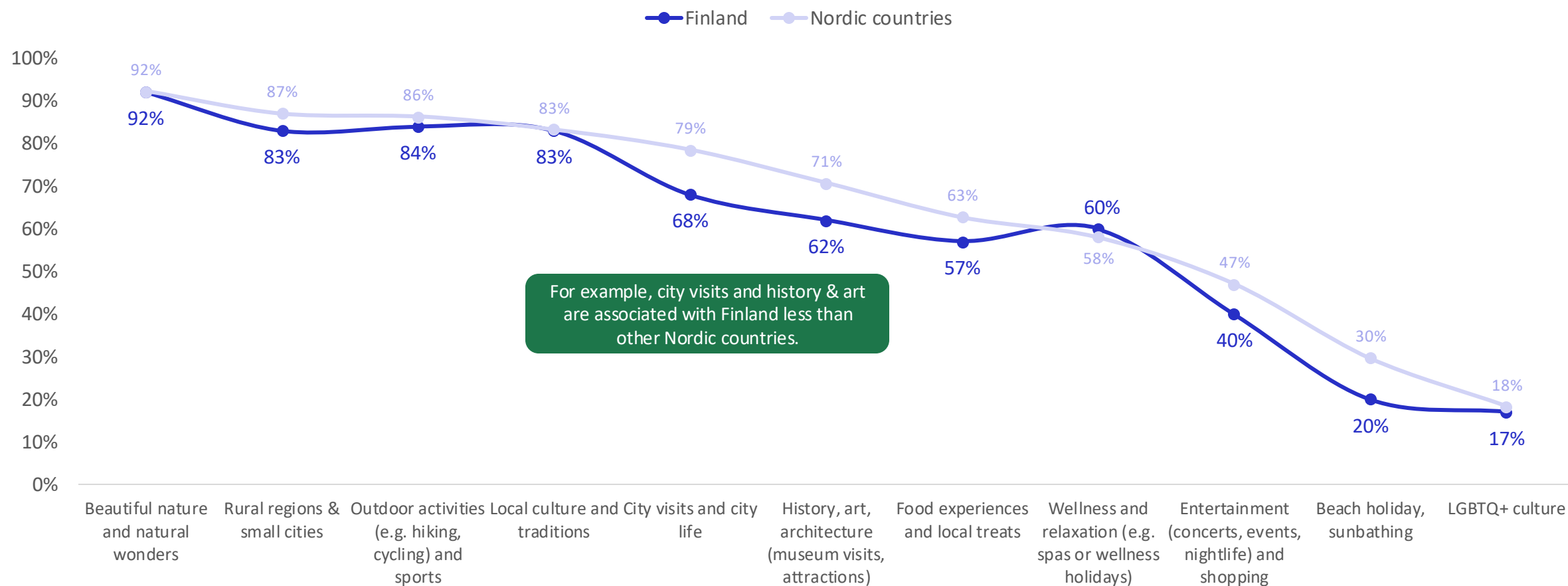
German travelers are most familiar with Denmark as a travel destination and have also visited it the most. Finland's reputation and consideration are below the level of the other Nordic countries.

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



Nature, countryside, outdoor activities and local culture are travel themes that are clearly associated with all the Nordic countries.

Linking travel themes to Finland and the Nordic countries



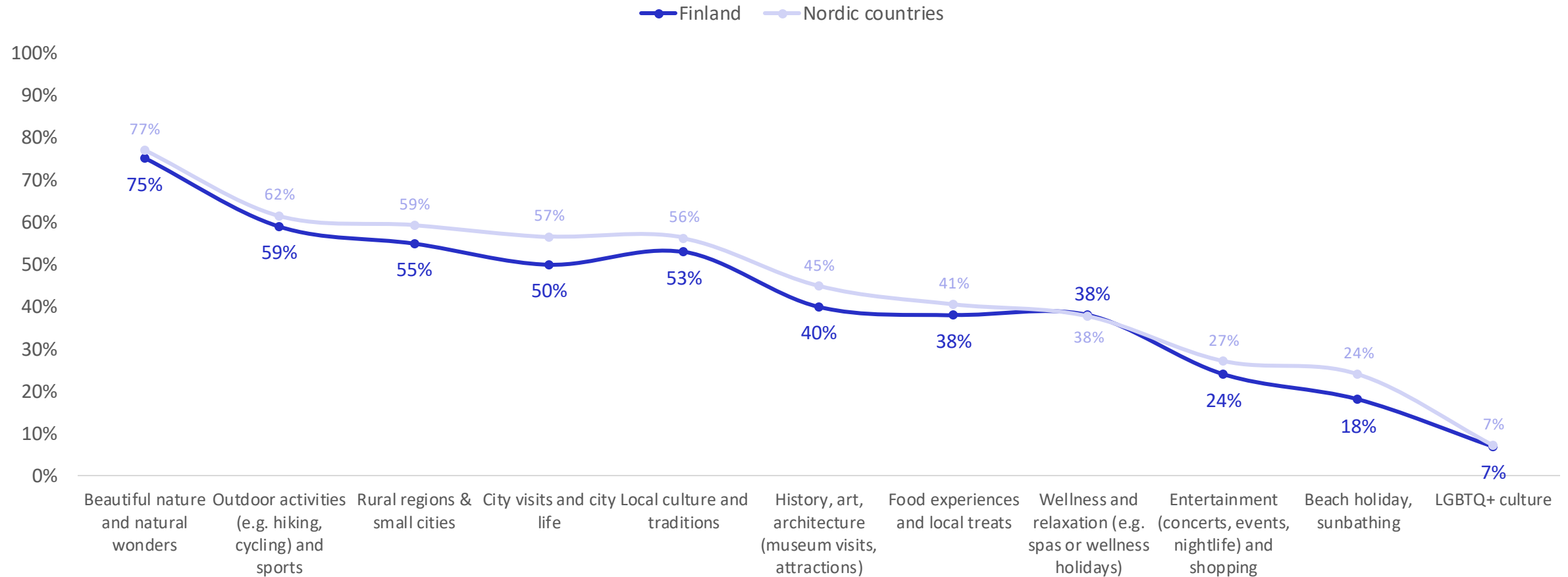
Sweden's association with more travel themes is a little stronger than other countries.

Linking travel themes to Finland and the Nordic countries

					Average
Beautiful nature and natural wonders	92%	96%	94%	87%	92%
Rural regions & small cities	83%	92%	88%	85%	87%
Outdoor activities (e.g. hiking, cycling) and sports	84%	90%	90%	81%	86%
Local culture and traditions	83%	88%	84%	78%	83%
City visits and city life	68%	86%	78%	82%	79%
History, art, architecture (museum visits, attractions)	62%	77%	73%	71%	71%
Food experiences and local treats	57%	68%	62%	64%	63%
Wellness and relaxation (e.g. spas or wellness holidays)	60%	60%	56%	56%	58%
Entertainment (concerts, events, nightlife) and shopping	40%	53%	43%	52%	47%
Beach holiday, sunbathing	20%	30%	20%	49%	30%
LGBTQ+ culture	17%	19%	18%	19%	18%

The Nordic countries are the top choice for nature holidays. Finland is considered slightly less popular than other Nordic countries as a holiday destination for both smaller and larger cities.

Attractiveness of the Nordic countries by travel theme



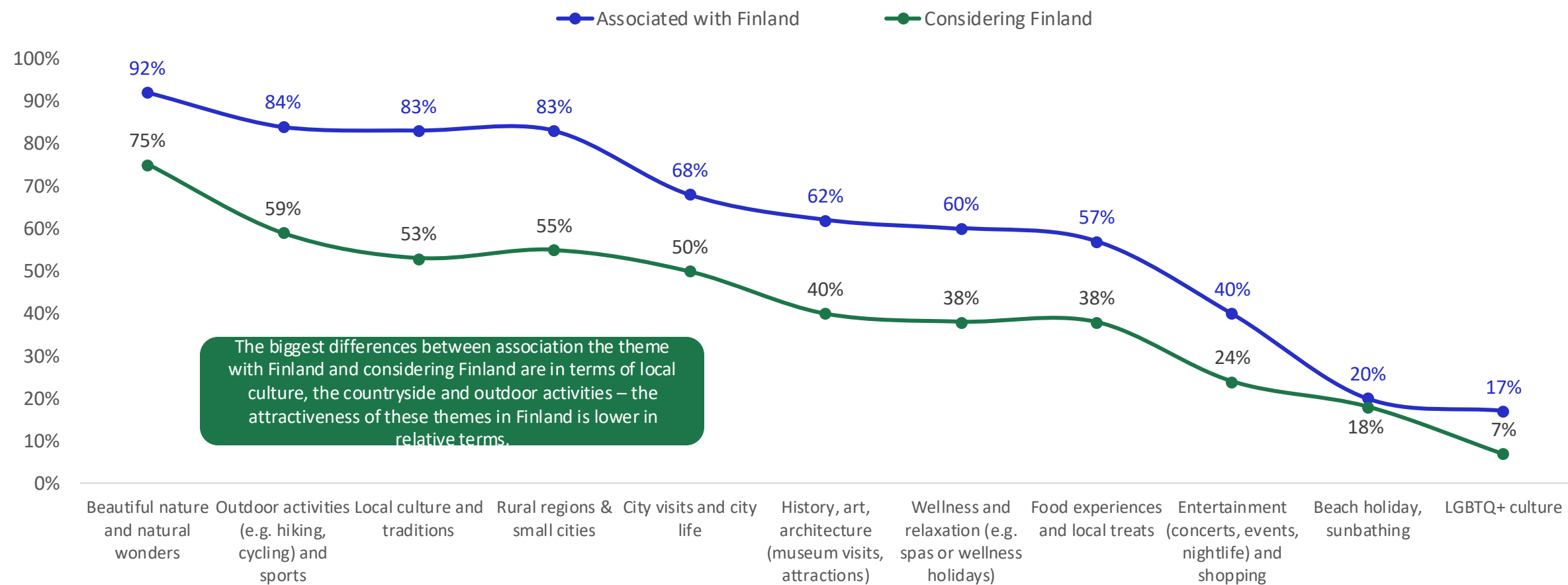
Norway is the most attractive country for nature tours and outdoor activities. Sweden is at the forefront when it comes to city visits.

Attractiveness of the Nordic countries by travel theme

					Average
Beautiful nature and natural wonders	75%	80%	85%	68%	77%
Outdoor activities (e.g. hiking, cycling) and sports	59%	63%	72%	52%	62%
Rural regions & small cities	55%	63%	63%	56%	59%
City visits and city life	50%	63%	55%	58%	57%
Local culture and traditions	53%	62%	60%	50%	56%
History, art, architecture (museum visits, attractions)	40%	49%	46%	44%	45%
Food experiences and local treats	38%	45%	40%	39%	41%
Wellness and relaxation (e.g. spas or wellness holidays)	38%	37%	37%	39%	38%
Entertainment (concerts, events, nightlife) and shopping	24%	28%	25%	31%	27%
Beach holiday, sunbathing	18%	23%	19%	36%	24%
LGBTQ+ culture	7%	6%	8%	8%	7%

Finland has a strong association with the nature themes and is also clearly considered a nature destination.

Merging and attracting travel themes, Finland



Country image: Nordic countries

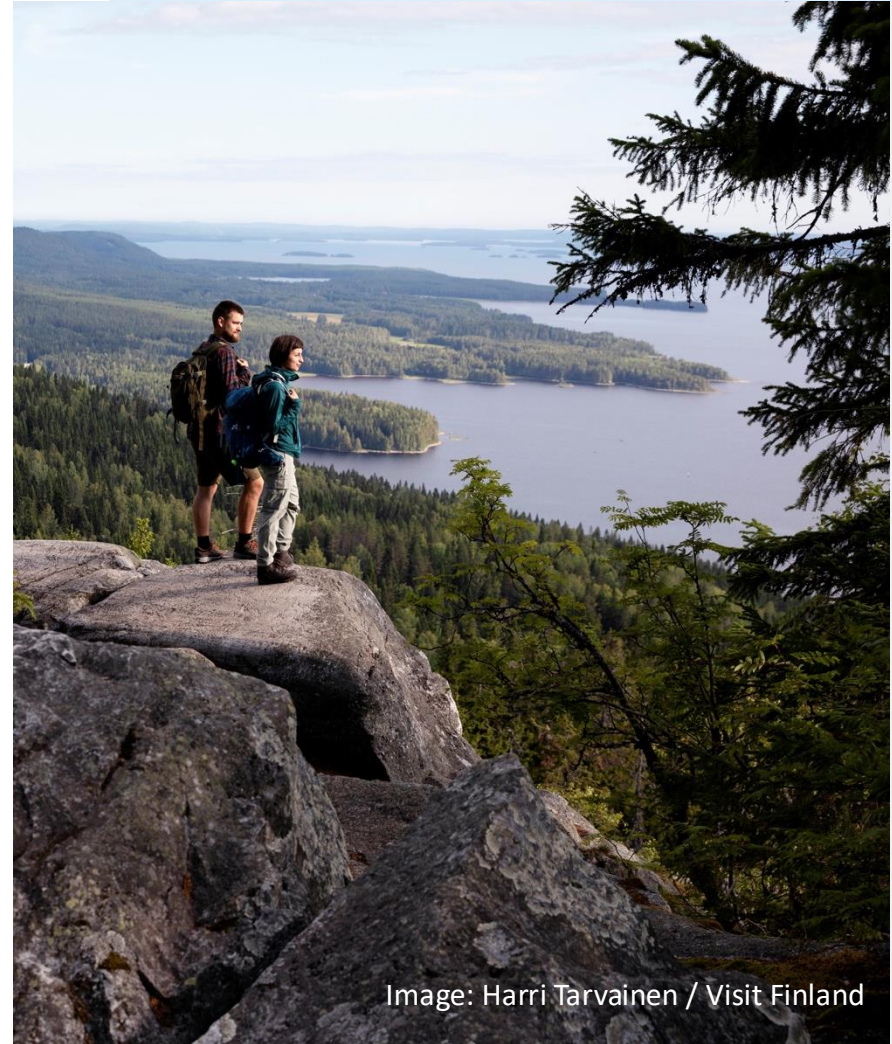
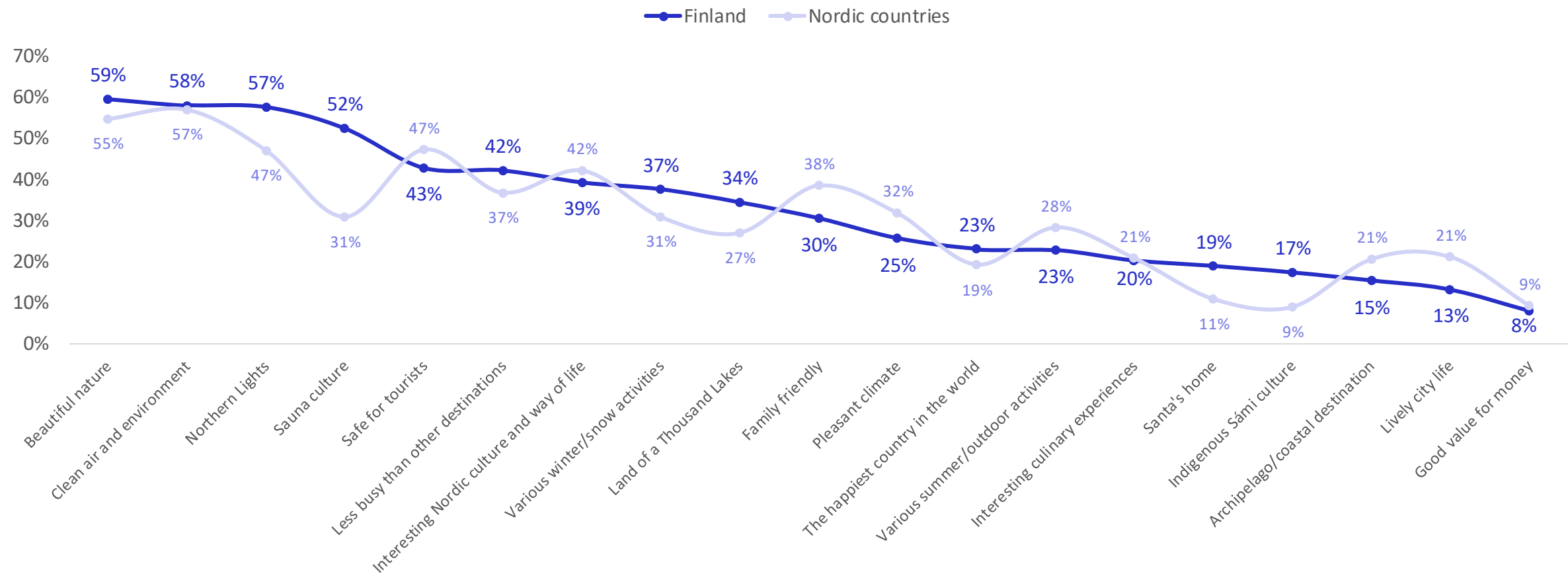


Image: Harri Tarvainen / Visit Finland

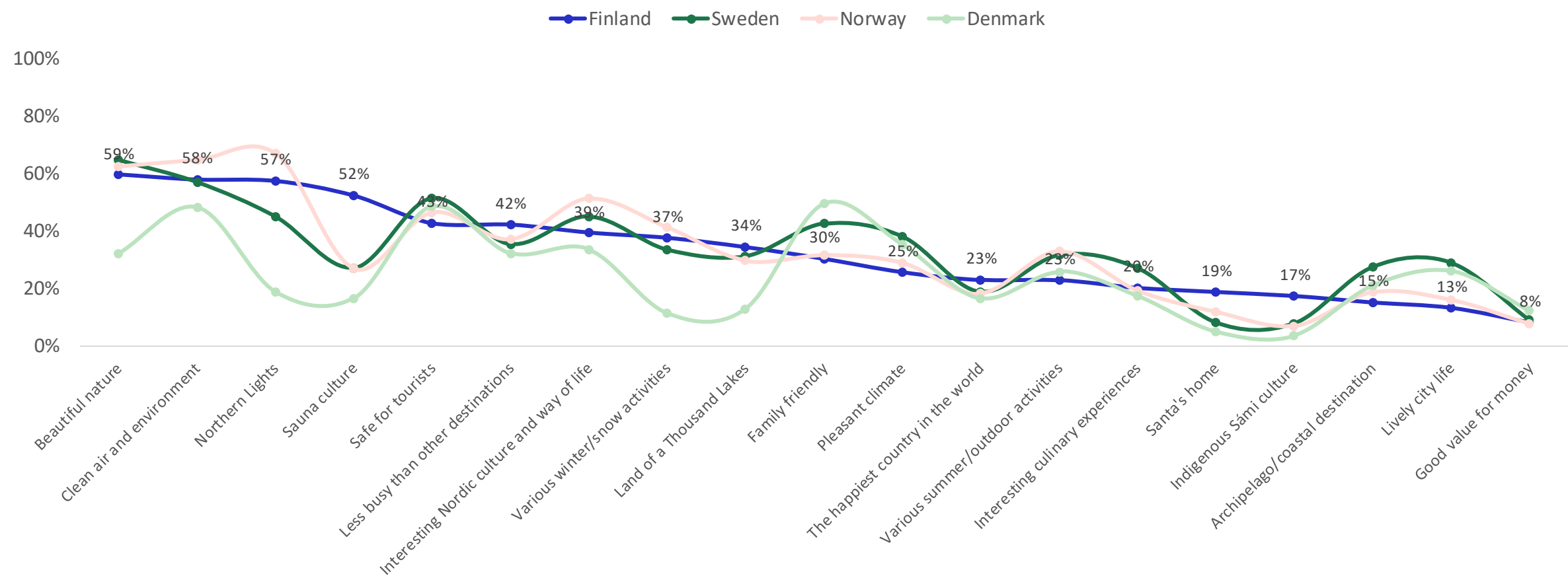
According to the Germans, Finland is best described by beautiful nature, clean environment and northern lights. Sauna culture distinguishes Finland from other Nordic countries.

Country image, Finland vs. Nordic countries



Denmark's image differs slightly from that of the other Nordic countries – it is associated with fewer nature images.

Country image



Summer activities, Nordic culture, Santa's home and food are the most influential images for considering Finland.

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?

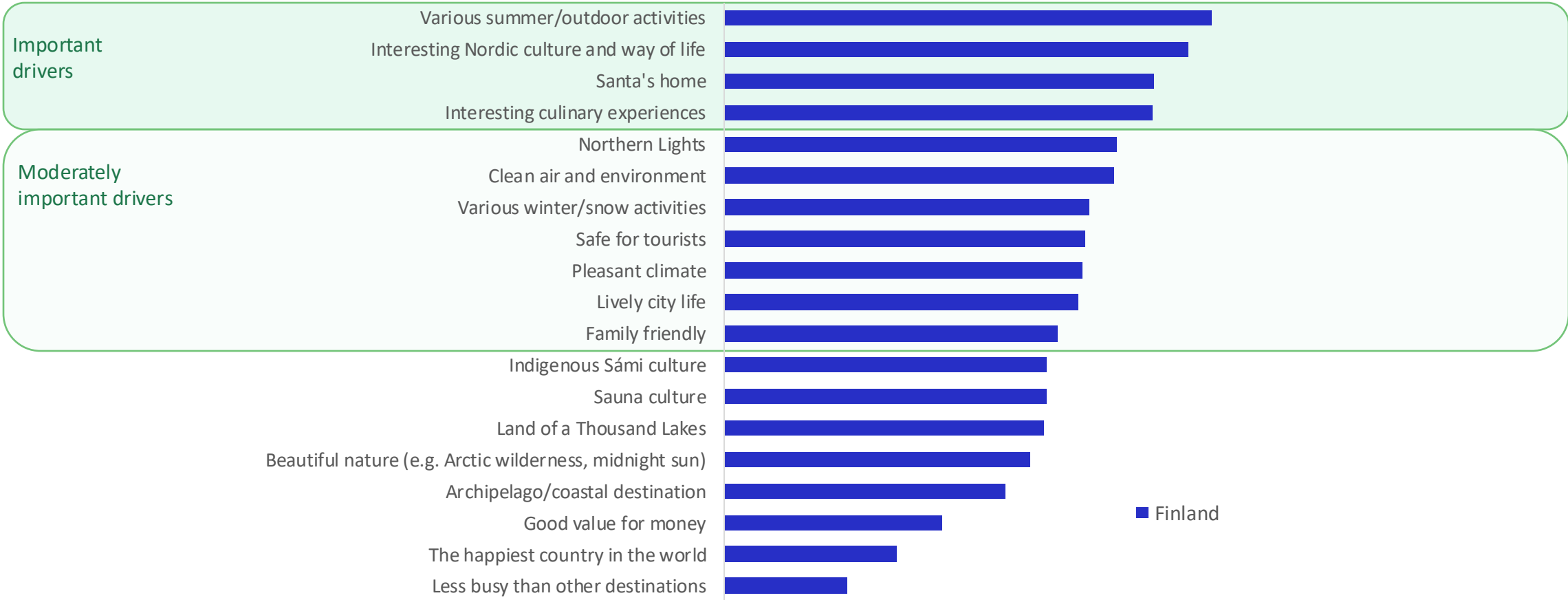
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

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

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1020 IP

The most important drivers to consider Finland are summer/outdoor activities, Nordic culture, Santa Claus and culinary experiences.

Drivers of consideration

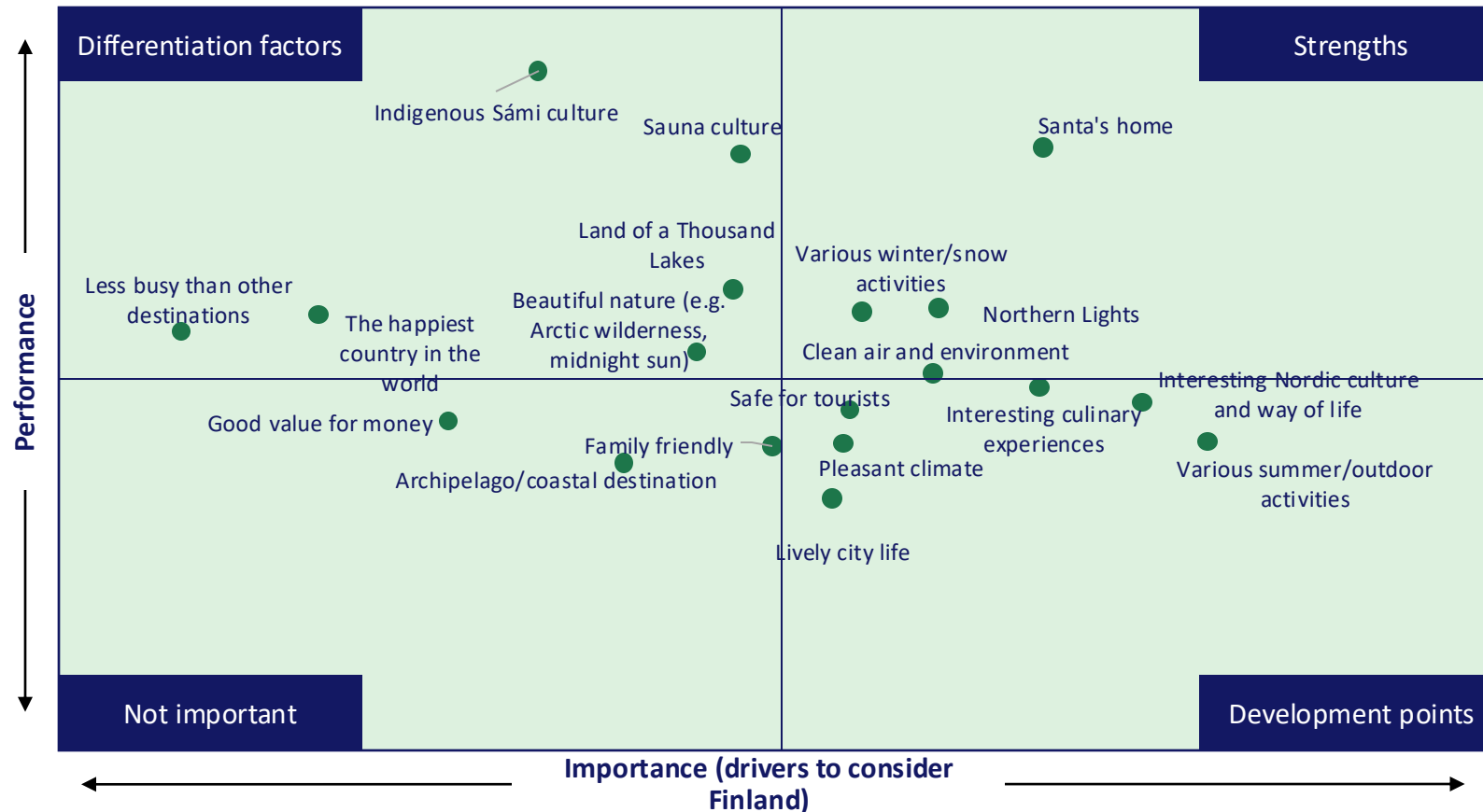


Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration. Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?: (Finland)/ Which of these features do you associate with Finland as a travel destination?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1020 IP

Finland's strengths include Santa's home, the northern lights and winter activities. Santa's home is also an important driver of consideration for German tourists.

Importance vs. Performance: Country image



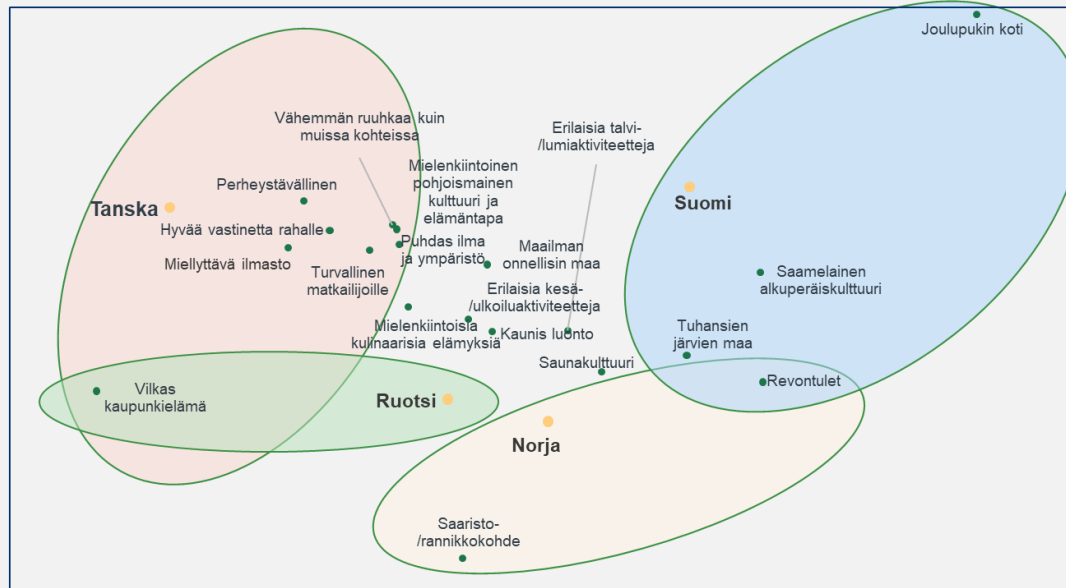
Comments

*Santa's home, the Northern Lights and winter activities are important drivers to consider Finland and also its **current strengths** in relation to the other Nordic countries.*

*Key drivers where Finland performs **at the same level** as the other Nordic countries: **interesting Nordic culture and lifestyle, culinary experiences, clean air and environment, and security.***

*Finland's **development targets** in the key drivers include images of **summer and outdoor activities and urban life.***

HOW TO READ THE MIND MAP



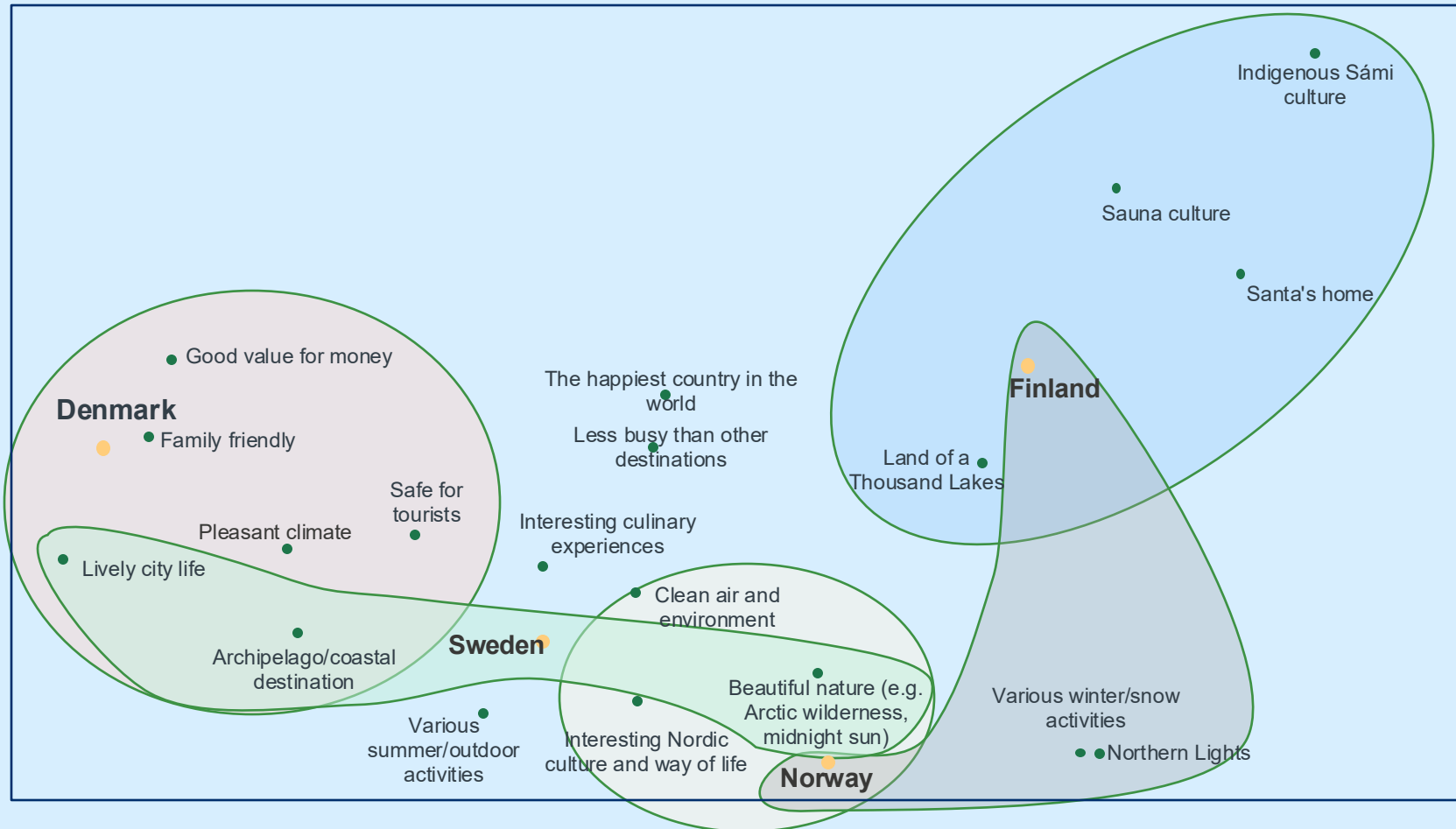
The positioning map visualises how tourists experience different countries and the images associated with them.

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.

In the eyes of the Germans, Finland has its own country image, which most clearly involves the sauna culture and also other elements.

Country image, relative image



Comments

Finland's position is unique in the eyes of the Germans – Finland is relatively more associated with indigenous Sámi culture, sauna culture, Santa's home and lake scenery. Winter and the Northern Lights are also factors that distinguish Finland, which the country shares with Norway.

Denmark stands out more as a city destination: family-friendly, safe. Sweden is positioned between Denmark and Norway.

The image and attractiveness of Finnish food



Image: Soili Jussila / Vastavalo / Visit Finland

Finnish cuisine reminds Germans the most of fish and game. They also consider it heavier and richer than other countries.

Spontaneous impression of Finnish cuisine

- **Fish and game (especially reindeer and elk)** are what Germans imagine to be the heart of Finnish cuisine.
- Food is seen as **natural, fresh, simple and down-to-earth**, but also often **through the image of “heavy”, “rich” and “not very spicy” or “bland”**.
- **Berries, potatoes and bread** are often mentioned as side dishes.
- **Unfamiliarity is very common**, but there is a recurring curiosity and interest in experimenting with food.
- **They do not think there is a lot of vegetarian food**, and some describe the food as “not very vegetarian-friendly”.

"Probably very meat-focused"

"Down-to-earth, lots of fish dishes"

"I think they process a lot of fish and game"

"I think Finnish food is healthy"

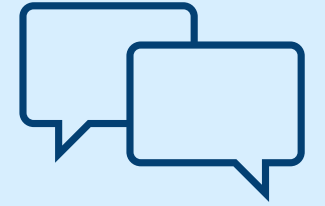
"Finnish cuisine is interesting and delicious, with a lot of fish, potatoes, berries and dairy products."

"Traditional food, a lot of fish, somewhat fatty food"

"Close to nature and freshness, honest and genuine taste"

"Not that suitable for vegetarians"

"I find Finnish cuisine very interesting, but I can't eat everything because I'm a vegetarian."



Finnish food is not known, or it does not evoke associations of attractiveness.

Reasons why Finland is not seen as a food destination



Salmon and reindeer meat are the tastiest Finnish dishes for Germans.

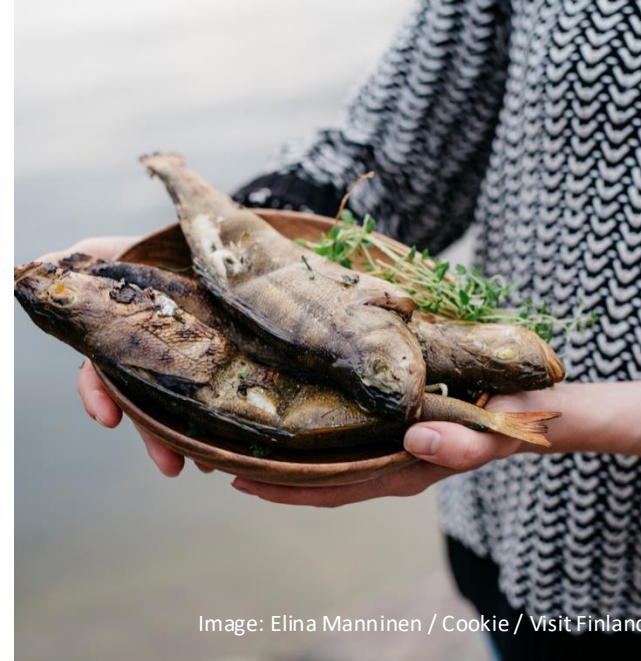


Image: Elina Manninen / Cookie / Visit Finland

Pastries & berries

Cinnamon roll,
Runeberg's torte,
Finnish sweets and
chocolates,
blueberry, cranberry



Image: Harri Tarvainen / Visit Finland

Salmon and fish based foods

Smoked, grilled,
salmon soup,
kalakukko, herring

Reindeer meat and other game

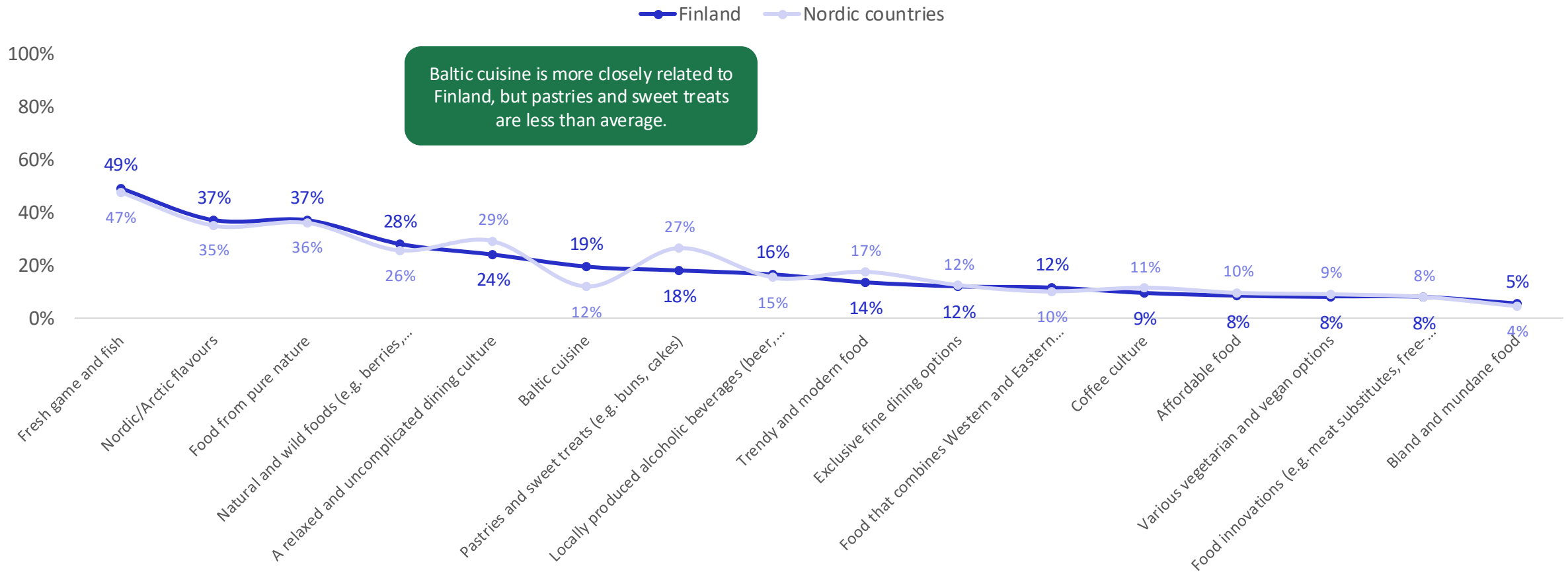
Elk, bear, reindeer
fry, game pâtés

Traditional soups and stews

Swede casserole, pea
soup, casseroles,
meatballs

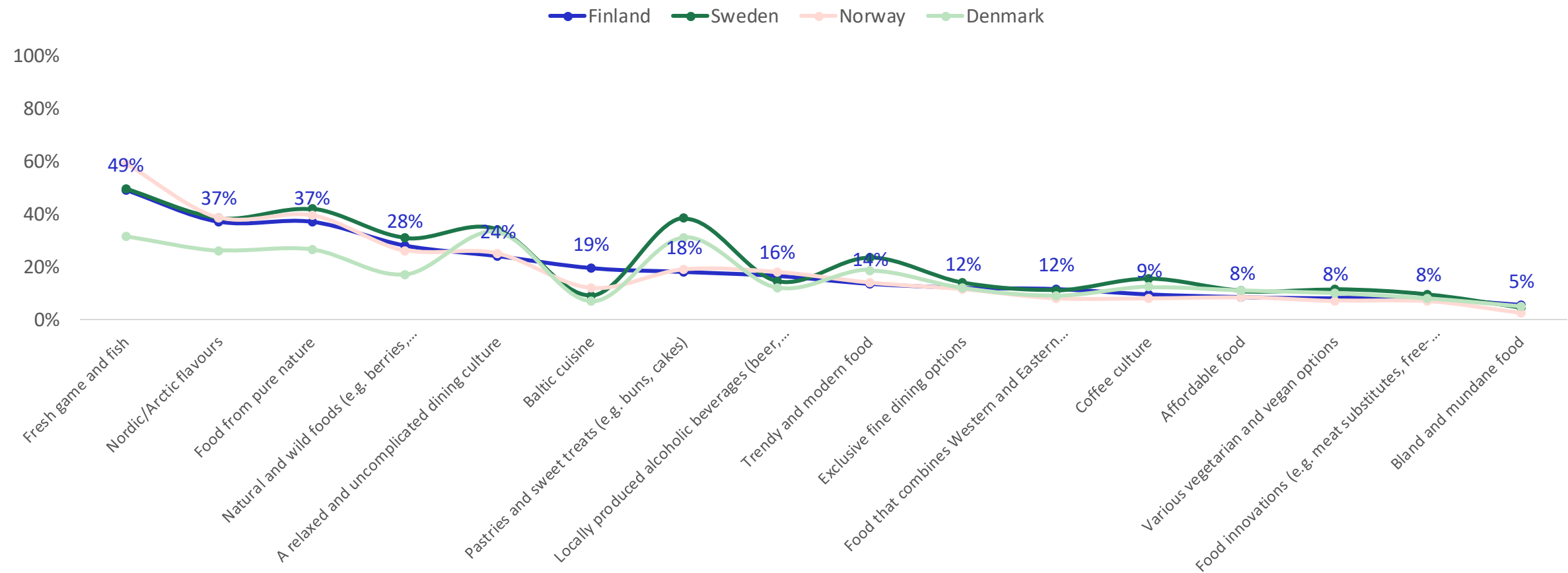
The food image associated with Finland and other Nordic countries is strongly based on fresh game and fish. Nordic/Arctic flavours and clean nature are also the strongest images.

Food image



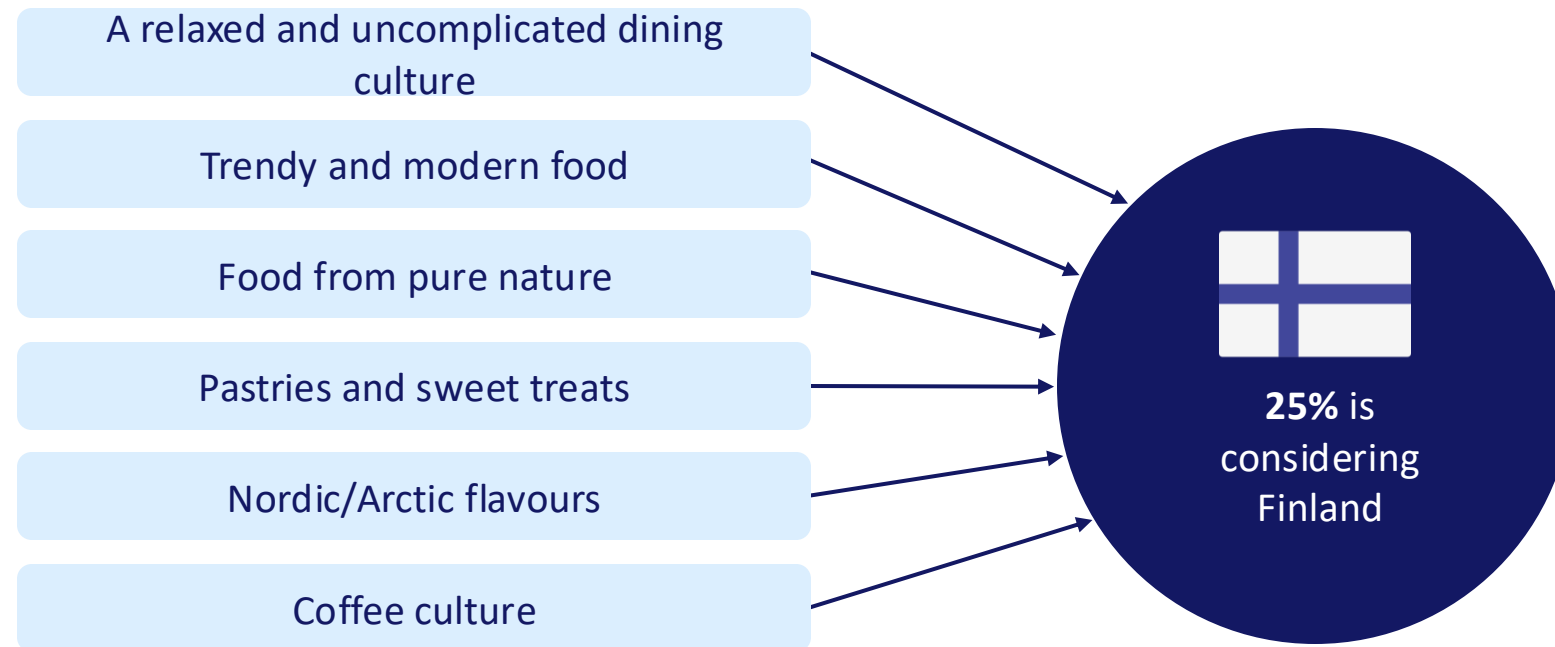
Denmark's food image is slightly different from that of the other Nordic countries, with fewer associations to Nordic and natural products in particular.

Food image



The most important drivers to consider Finland are the relaxed food culture, trendy food and food from pure nature

The most important attributes that drive consideration for Finland



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?

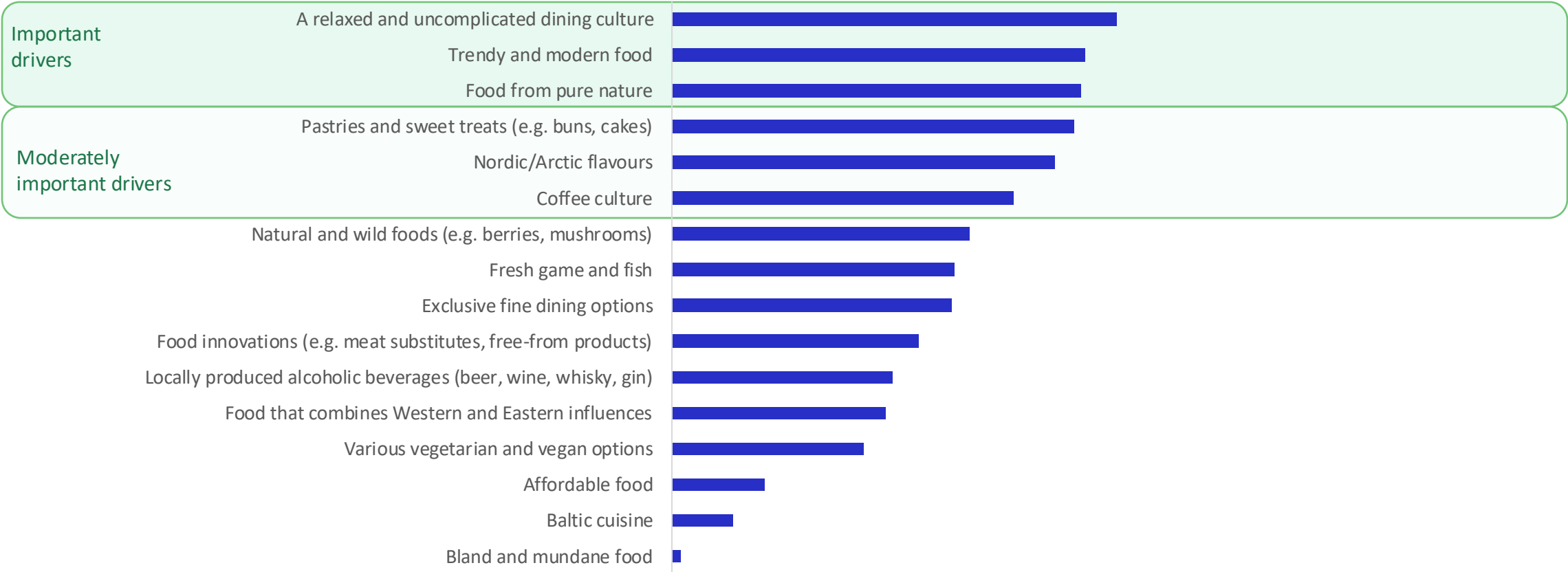
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

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 1020 IP

The most important drivers to consider Finland are the relaxed food culture, trendy food and food from pure nature. Pastries and coffee culture also play an essential role.

Attributes that drive consideration for Finland



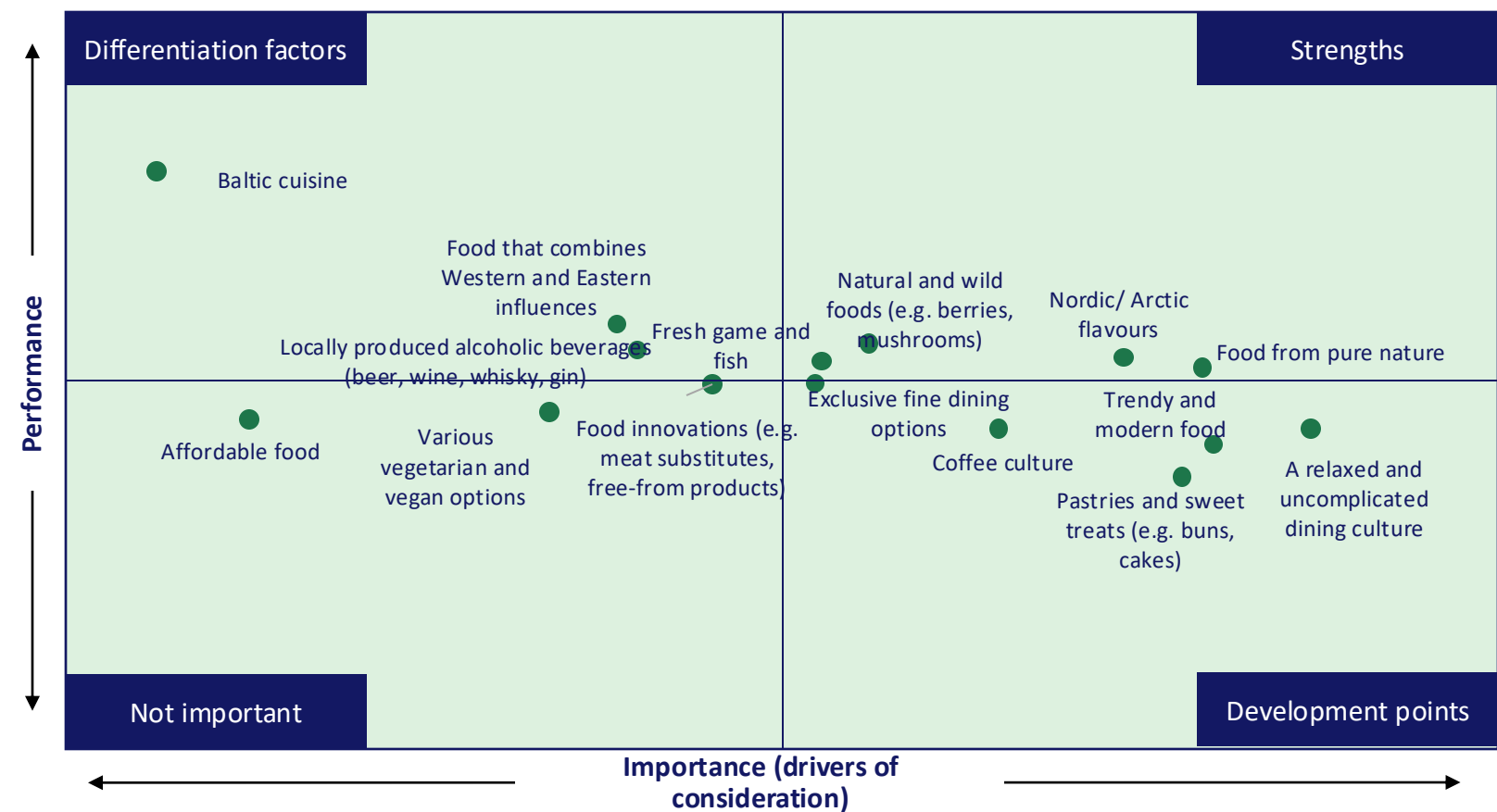
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

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 1020 IP

The most important drivers of food tourism, where Finland performs slightly worse than other Nordic countries, are relaxed food culture, trendy food and pastries.

Importance vs Performance: Food image



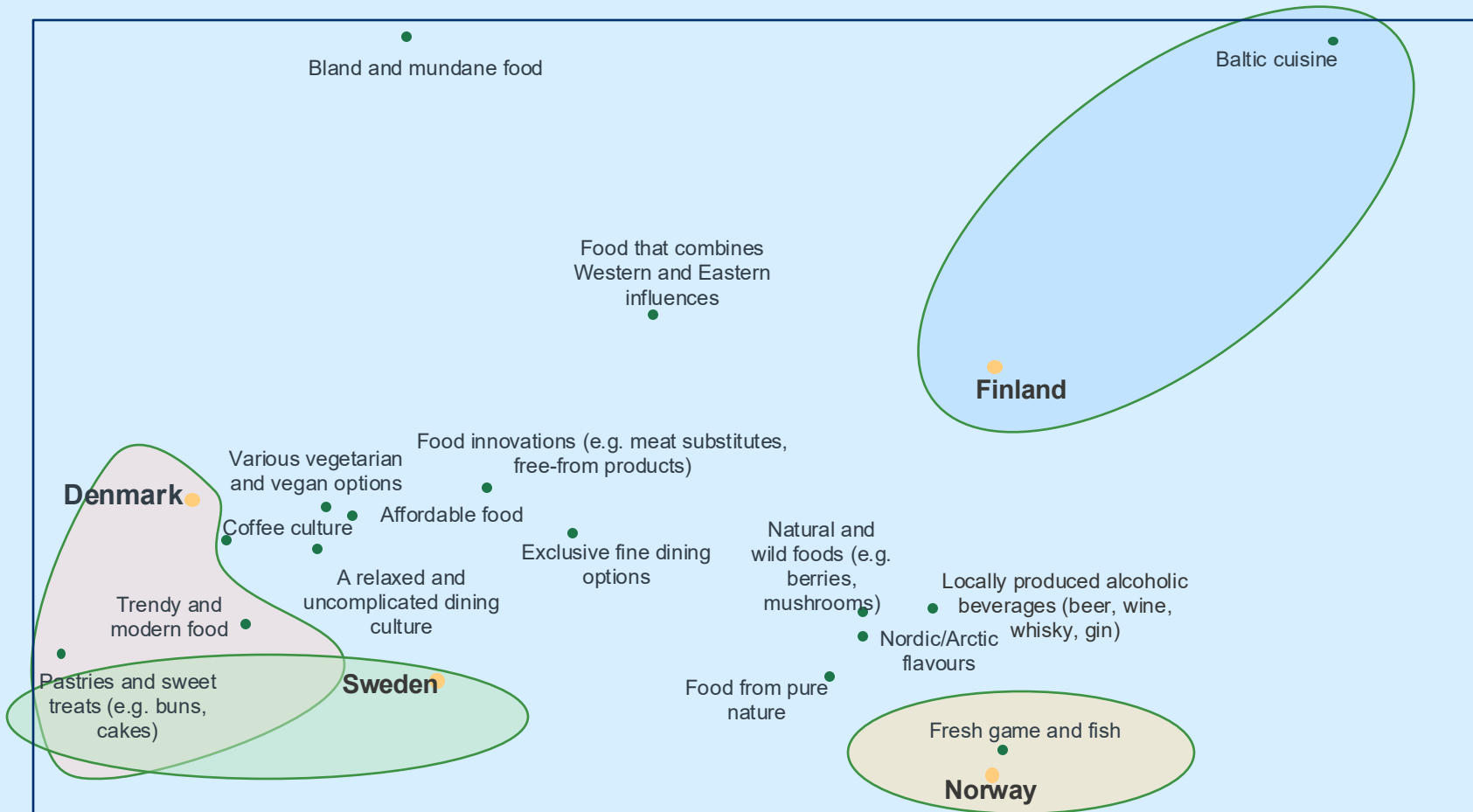
Comments

According to the Germans, Finland's food image is very close to other Nordic countries. For example, *in terms of relaxation, trendiness, and pastries*, Finland is slightly below the average of the comparison countries.

Baltic cuisine is associated with Finland a little more than other countries. Although it is not the most important driver of food tourism, it is a differentiating factor for Finland.

The food image of the Nordic countries is very similar, there are only a few distinguishing factors.

Food image, relative image

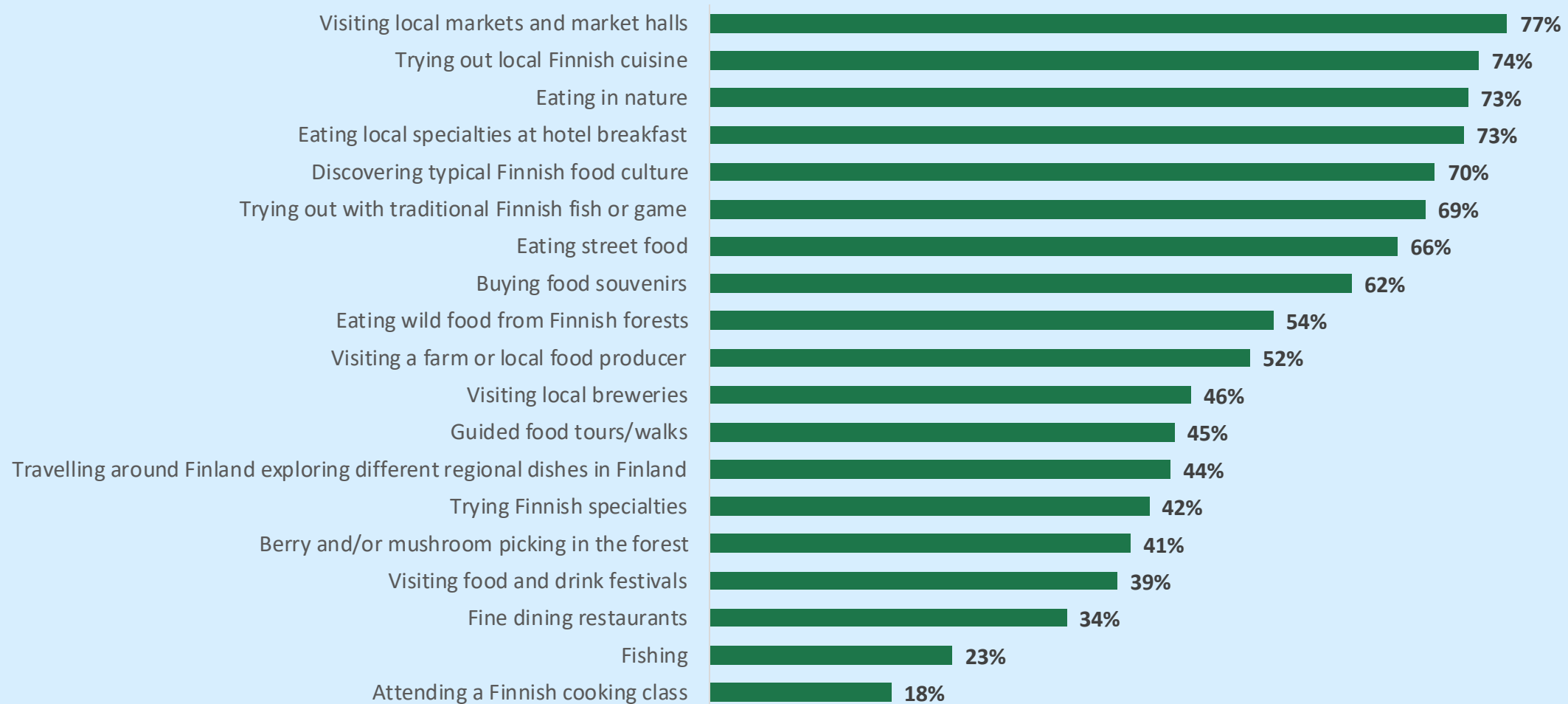


Comments

Baltic cuisine differentiates Finland's food image from the other Nordic countries .

Norway has a stronger association with fresh game and fish than other countries. Sweden and Denmark are associated with pastries. In addition, Denmark is perceived to have slightly more trendy cuisine.

Interest in Finnish food experiences is quite high. Most likely, tourists would visit markets, try local cuisine, eat in the wild, and try local specialties at a hotel breakfast.



The most popular image is about eating in nature/outdoors. The image of a casual market café atmosphere are the second most popular, and individual dishes are the least appealing.



Elna Manninen / Visit Finland

48%



Aitomakuja.fi / Julia Kivela / Visit Finland

38%



Harri Tarvainen / Visit Finland

31%



Julia Kivela / Visit Finland

26%



Mikko Huhtari / Visit Finland

23%



KotaCollective / Visit Finland

22%



21%



Okkola Holiday Cottages / Visit Finland

15%



Visit Finland

10%

What influenced the selection of your favourite photos?

Respondents chose their favourite images because they showed delicious and attractive food in a natural setting. The German responses emphasize tranquility, authenticity, simplicity and affinity with personal life and taste experiences.. The atmosphere, aesthetics, and combination of nature and food were key selection criteria. In addition, sense of community, cheerfulness and the Finnish scenery emerged in the responses.

Appendices