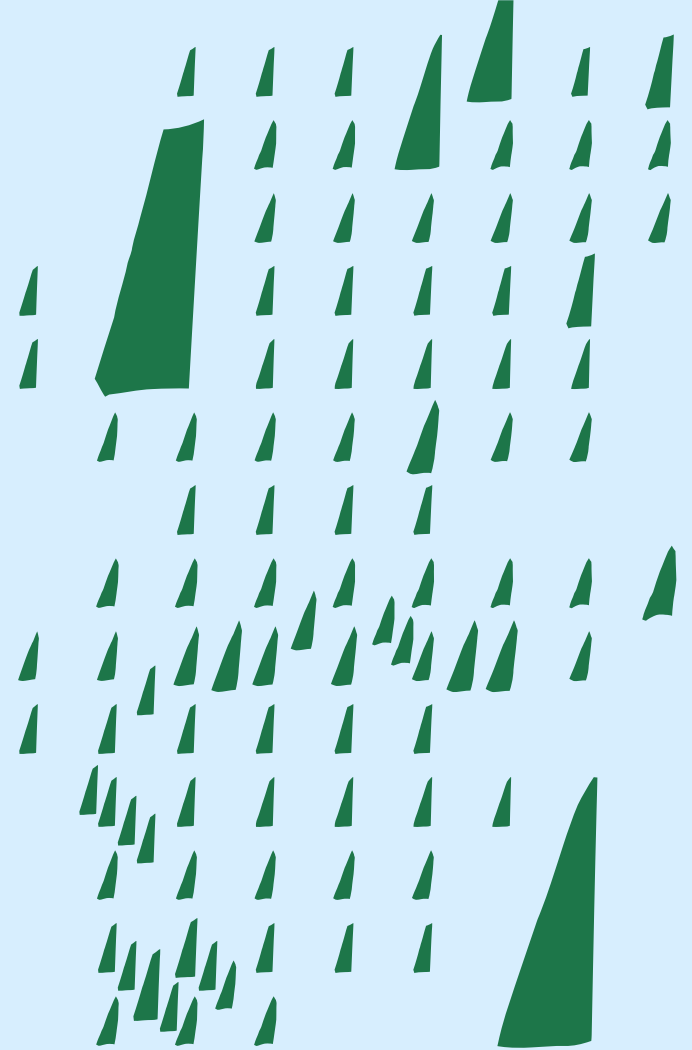


JAPAN

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

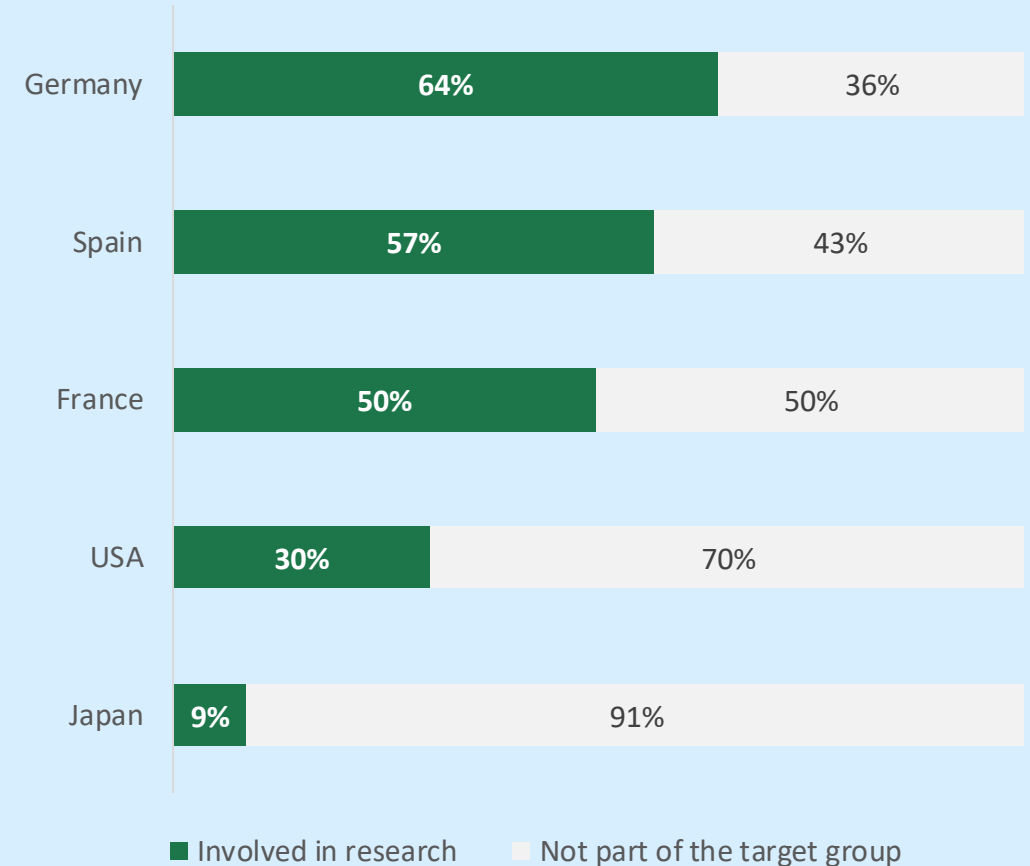
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

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

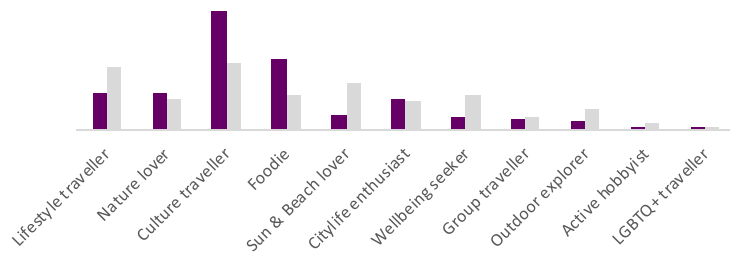
Plans a leisure trip in the next three years



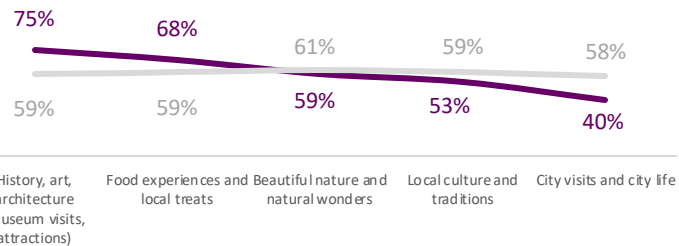
Profile card JAPAN



SEGMENTS



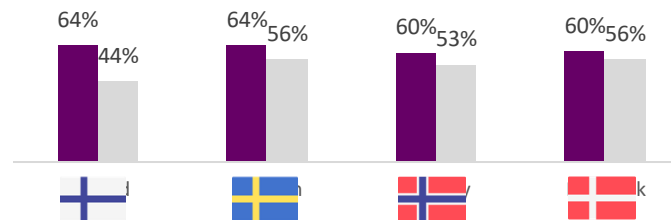
THE MOST INTERESTING TRAVEL THEMES



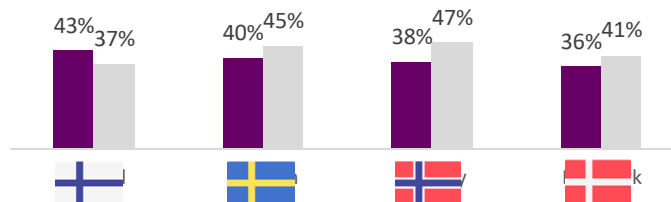
THE ATTRACTIVENESS OF FINLAND AS A FOOD TOURISM DESTINATION



AWARENESS OF THE NORDIC COUNTRIES



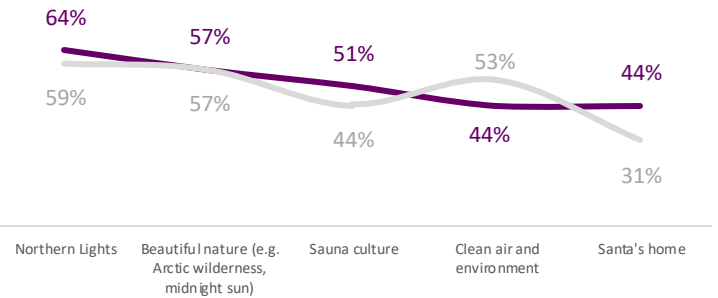
CONSIDERATION OF THE NORDIC COUNTRIES



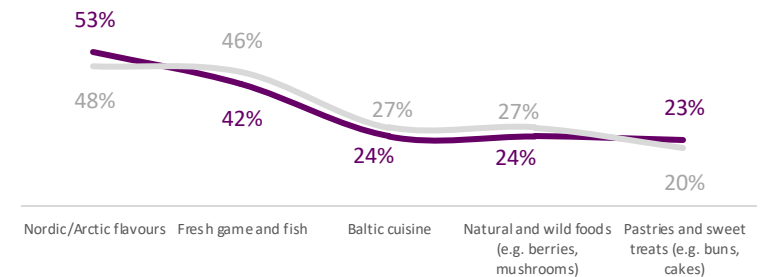
MOST IMPORTANT DRIVERS OF CONSIDERATION FOR FINLAND



TOP 5 COUNTRY IMAGES OF FINLAND



TOP 5 FOOD IMAGES IN FINLAND



Summary JAPAN

JAPANESE AS TOURISTS



While travelling, what Japanese people are most interested in is to experience **history, food and beautiful nature**. Japanese people search for information about travel destinations primarily through search engines. Unlike the other markets, they use **local websites, travel review sites, and print publications**, but rely less often on recommendations from friends.

Finland is the most considered travel destination in the Nordic countries, and about a third of Japanese people have already visited Finland. The main barriers to tourism are limited knowledge, high prices and difficult access. Finland is considered a little more often than other Nordic countries as a **nature, wellbeing and outdoor holiday destination**.

Finland's consideration is guided in particular by **an interest in the Nordic way of life and culinary experiences**. Important attraction factors also include **Santa's home, sauna culture, Sámi indigenous culture, diverse summer and outdoor activities, and the reputation of the happiest country in the world**. Finland's strengths compared to other Nordic countries are especially the sauna culture and Santa's home.

RELATION TO FOOD



Food and drink experiences are very important to Japanese tourists. They are more interested in **cafes, street food and food safety** than other markets and do not stick to familiar foods as strongly as others. Japanese tourists plan exactly where to eat and drink at the destination.

Finnish cuisine emphasises **fish, naturalness, healthiness and simplicity**. The Japanese have liked to try a variety of Finnish cuisine: in addition to fish, reindeer, game, pots, Karelian pies, pastries, salty liquorice and coffee, for example. **Nordic flavours, as well as fresh fish and game**, have become the strongest images of Finnish food.

When considering Finland, the most important food-related drivers are **Nordic flavours, food from pure nature and pastries and sweet treats**. Finland's food image is close to other Nordic countries, but Finland stands out slightly in terms of Nordic flavours. On the other hand, when it comes to pastries and relaxed food culture – which are the most important drivers – Finland is a little bit left behind by the other Nordic countries.

JAPANESE VS OTHERS



Japanese tourists **know Finland best as a travel destination from the comparator countries**. They are clearly more **interested in history and food experiences** than other markets but less interested in city and beach holidays.

Compared to the other markets, Japanese tourists **are more organized food tourists** – they are very likely to search for information about the destination's restaurants in advance.

The drivers of Finland's consideration are **Santa's home** and Sámi indigenous culture, while **the Northern Lights are clearly a less significant factor** compared to other markets.

Of the images about food, **coffee culture is slightly emphasized as a driver for considering Finland**, while wild food is not as important a factor compared to other countries.

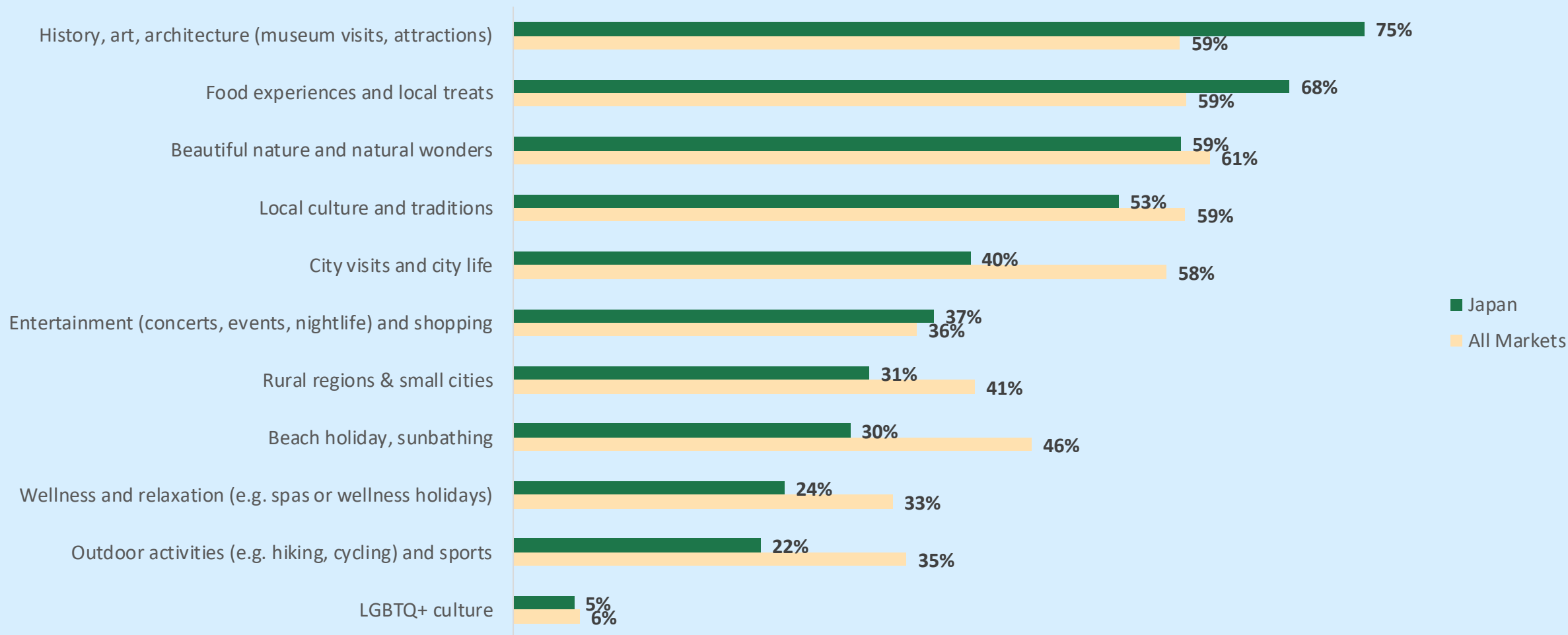
Travel behaviour & Interests



Image: Elina Manninen / Visit Finland

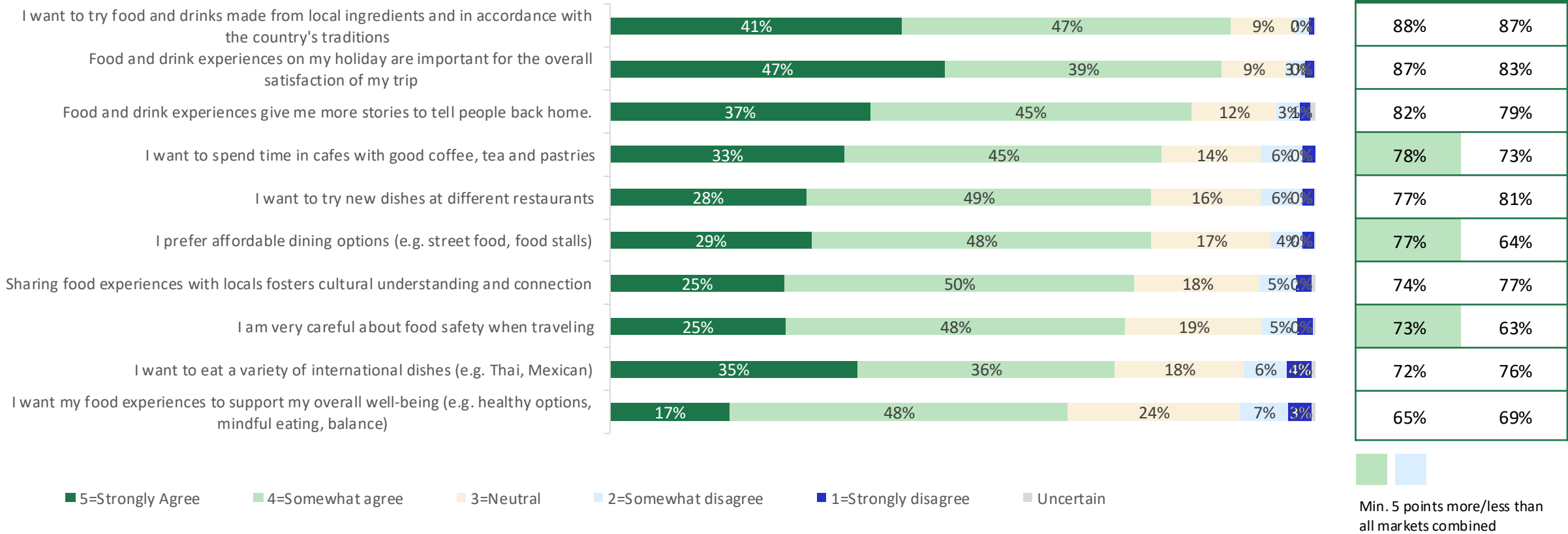
Japanese tourists are clearly more interested in history and food experiences than other markets.

Travel Themes



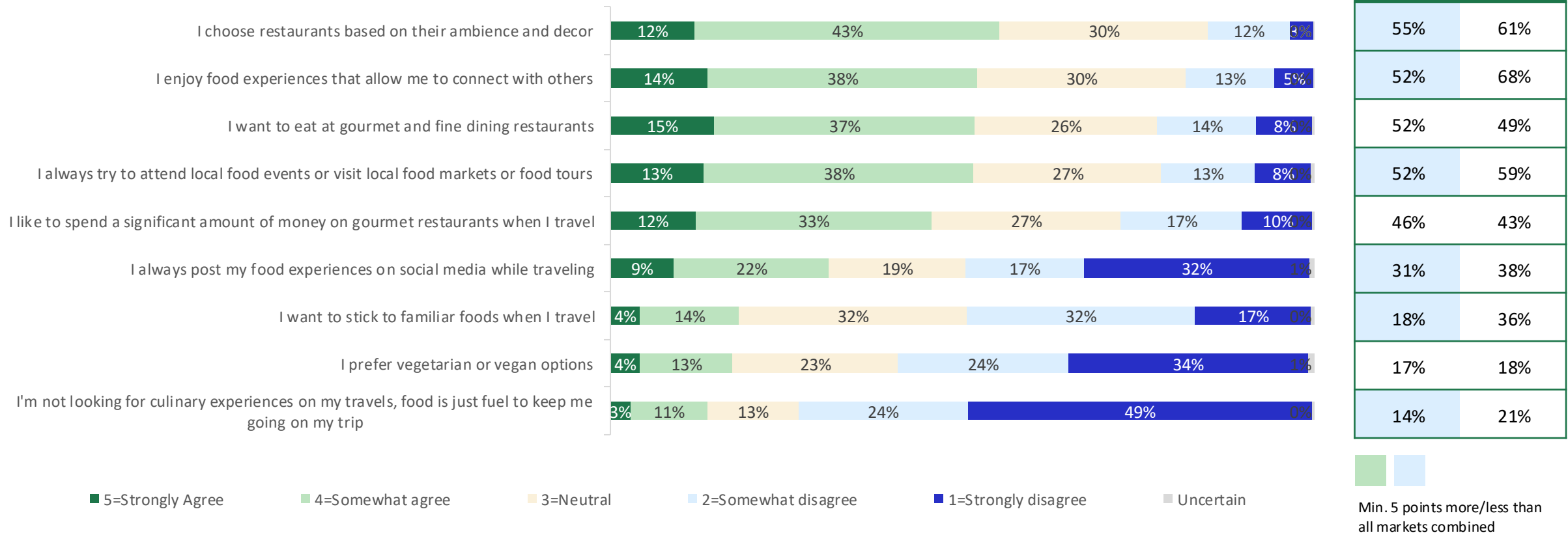
Food and drink experiences on the go are very important to Japanese people. They are also more interested in cafes, street food and food safety than other markets.

Tourist type 1/2



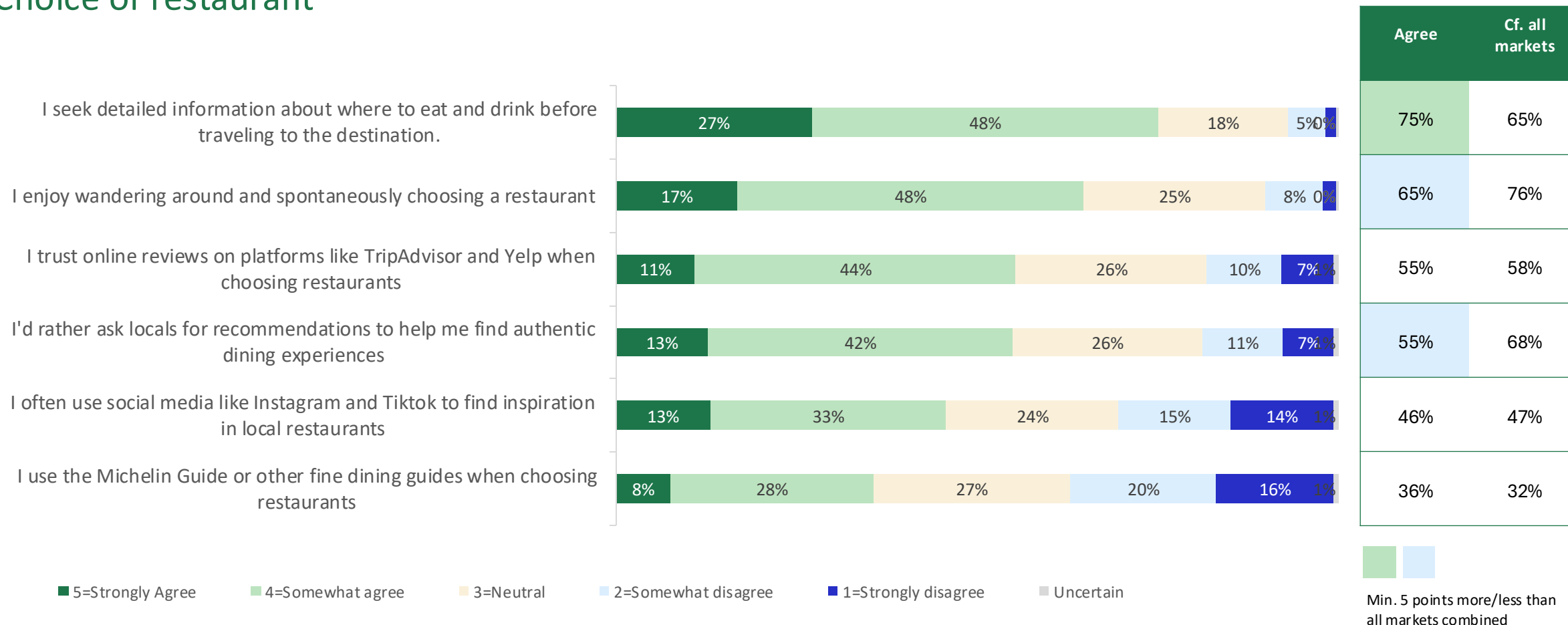
Sticking to familiar foods is not as important to Japanese tourists compared to other markets on average.

Tourist Type 2/2



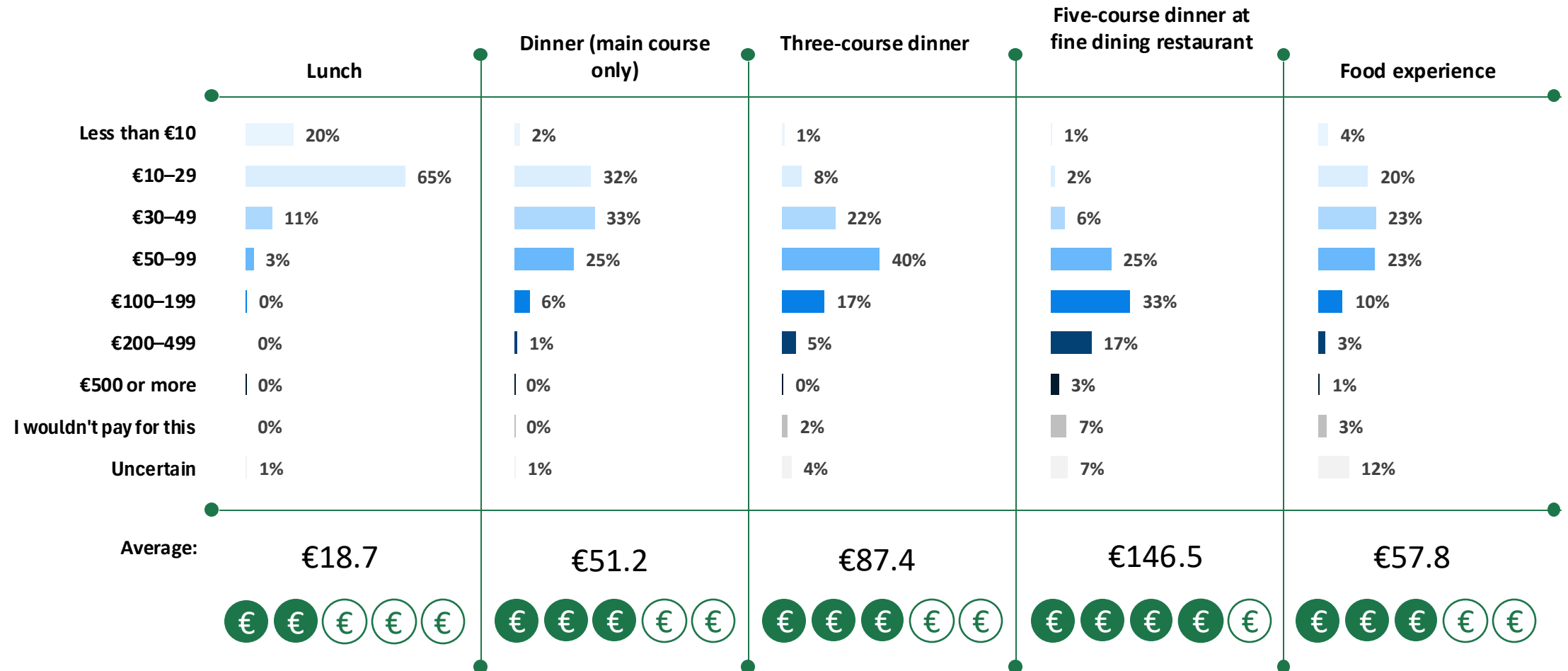
Japanese tourists are systematic when it comes to food and drink at the destination.

Choice of restaurant



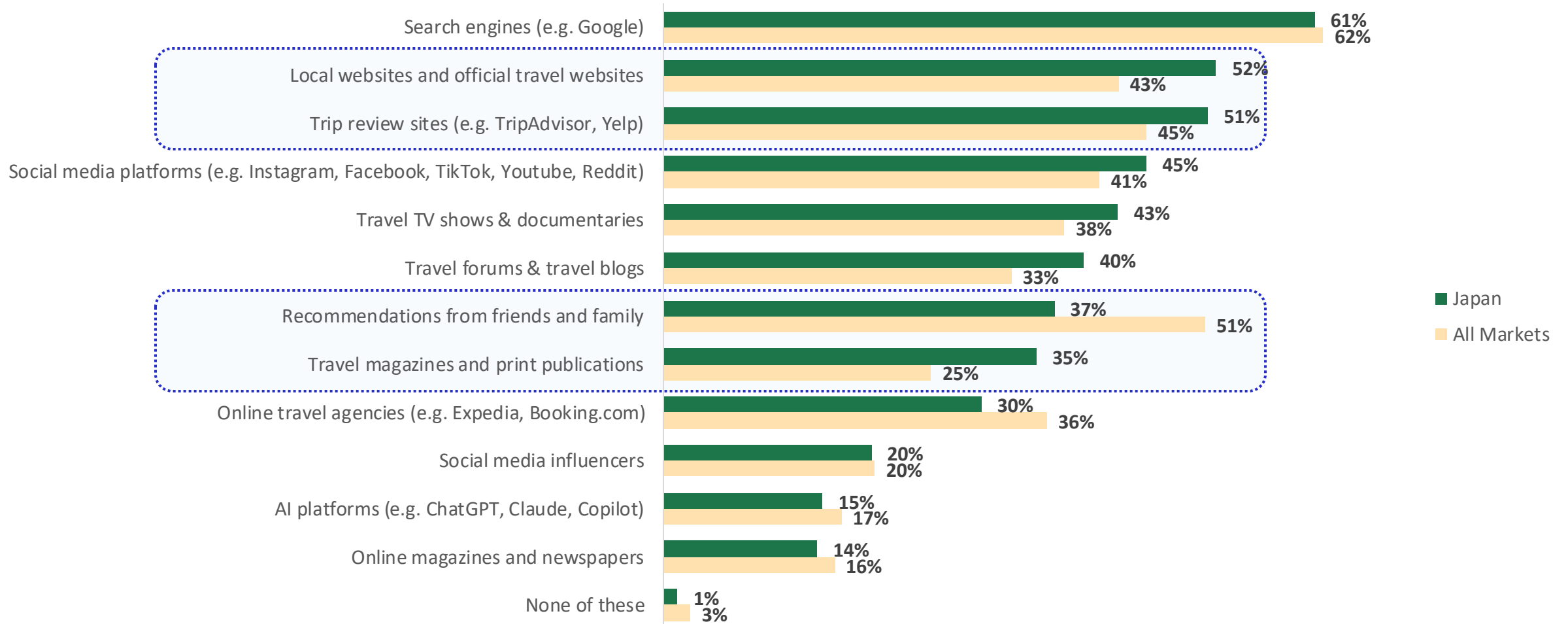
Japanese tourists would rather focus on a three or five-course dinner than a food experience.

Willingness to pay



Search engines are the main source of information for Japanese people. Compared to the other markets, Japanese people use their destinations' websites, travel review sites, and print publications more often, and rely less on recommendations from friends.

Sources of information



Awareness and attractiveness of destinations

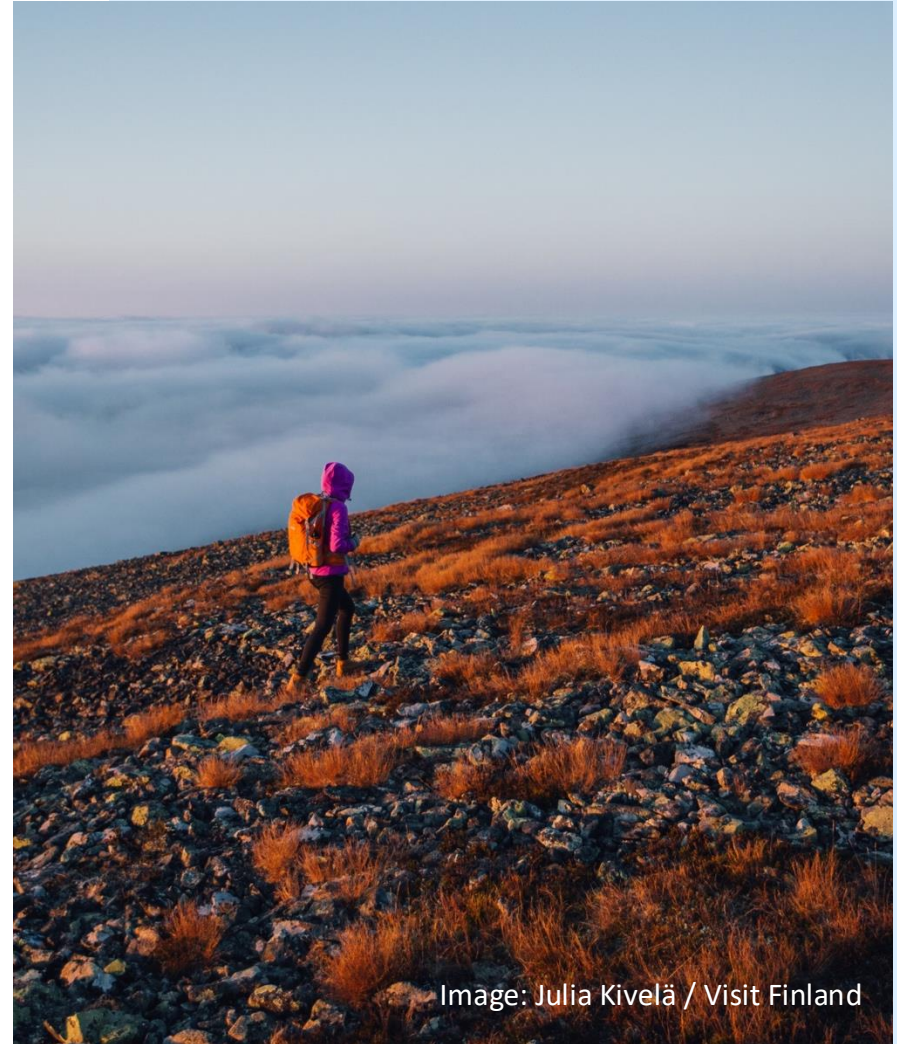
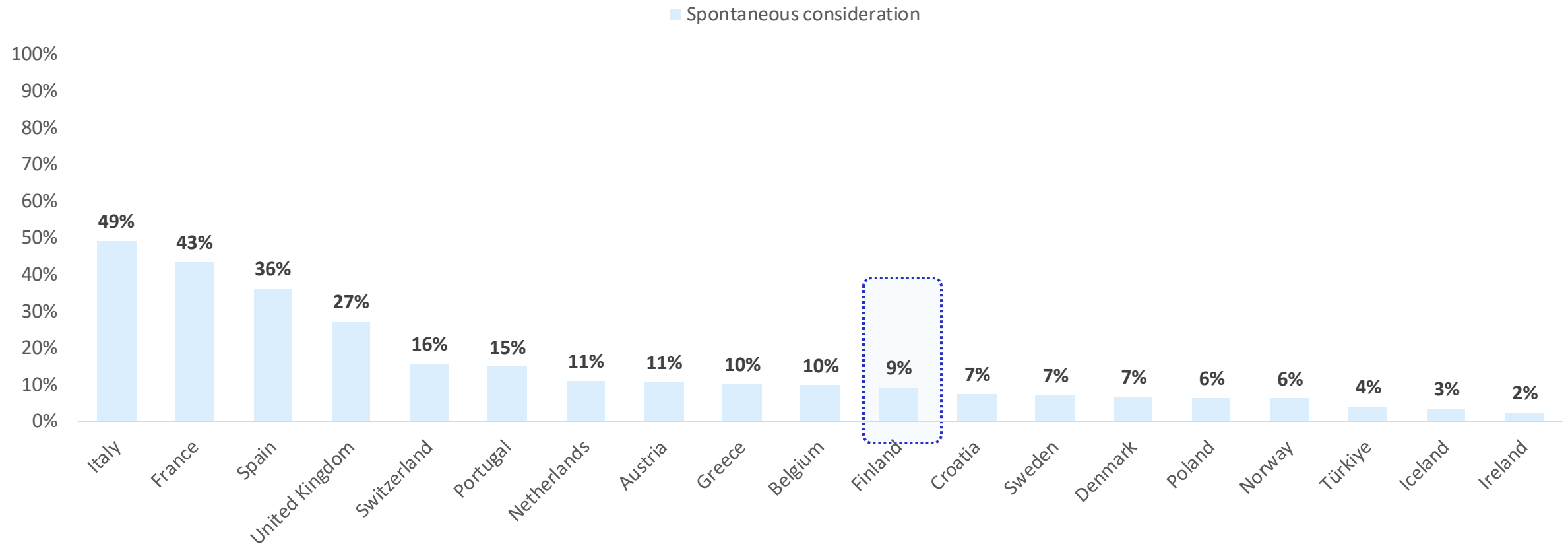


Image: Julia Kivelä / Visit Finland

Italy and France are the destinations in Europe that people most spontaneously choose to travel. Approximately one in ten holidaymakers are considering Finland for their next European destination.

Spontaneous consideration

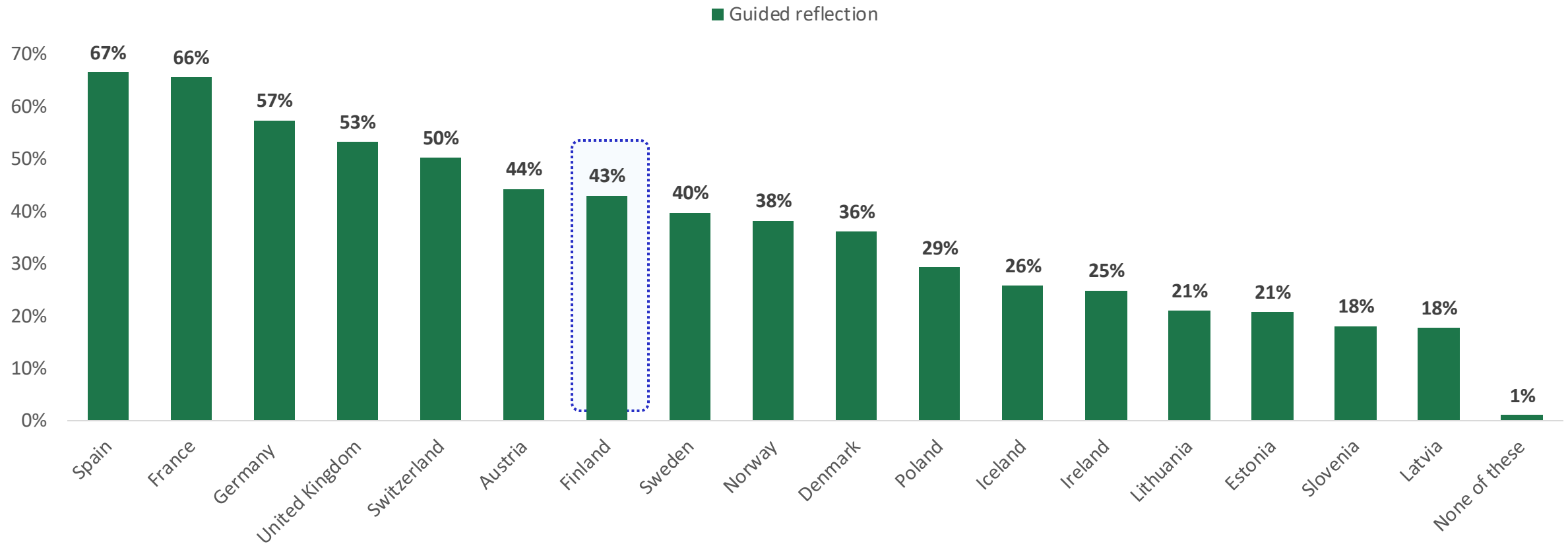


Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? (Open)

Respondents: 18-65 year olds planning a holiday in Europe trip in the next three years 1003 IP

Of the listed European countries, the most popular destinations are Spain and France. Finland is the one tourists consider the most among the Nordic countries.

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 in Europe trip in the next three years 1003 IP

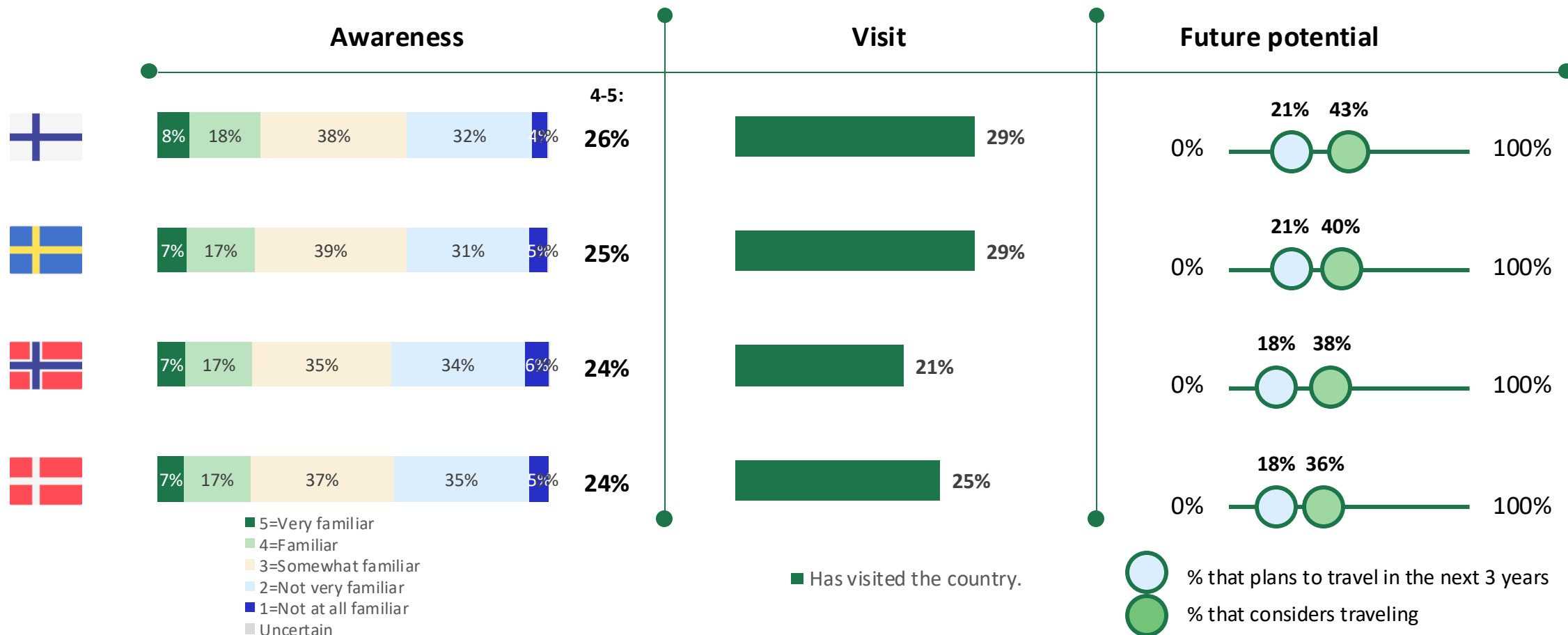
Limited knowledge and the high cost of the destination are the biggest obstacles to travelling to Finland.

Obstacles of travelling to Finland



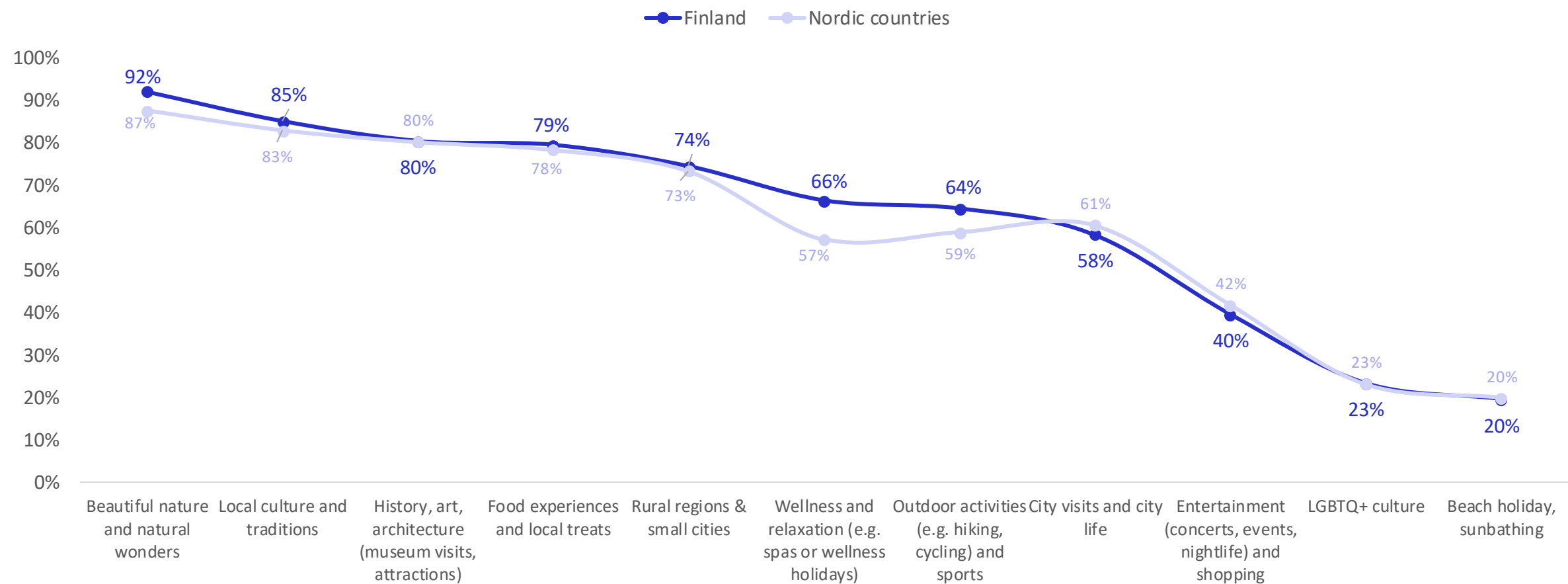
Awareness of the Nordic countries is at the same level, but Finland's future potential is greatest among Japanese people.

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



Beautiful nature, culture and history are most strongly linked to all the Nordic countries.

Linking travel themes to Finland and the Nordic countries



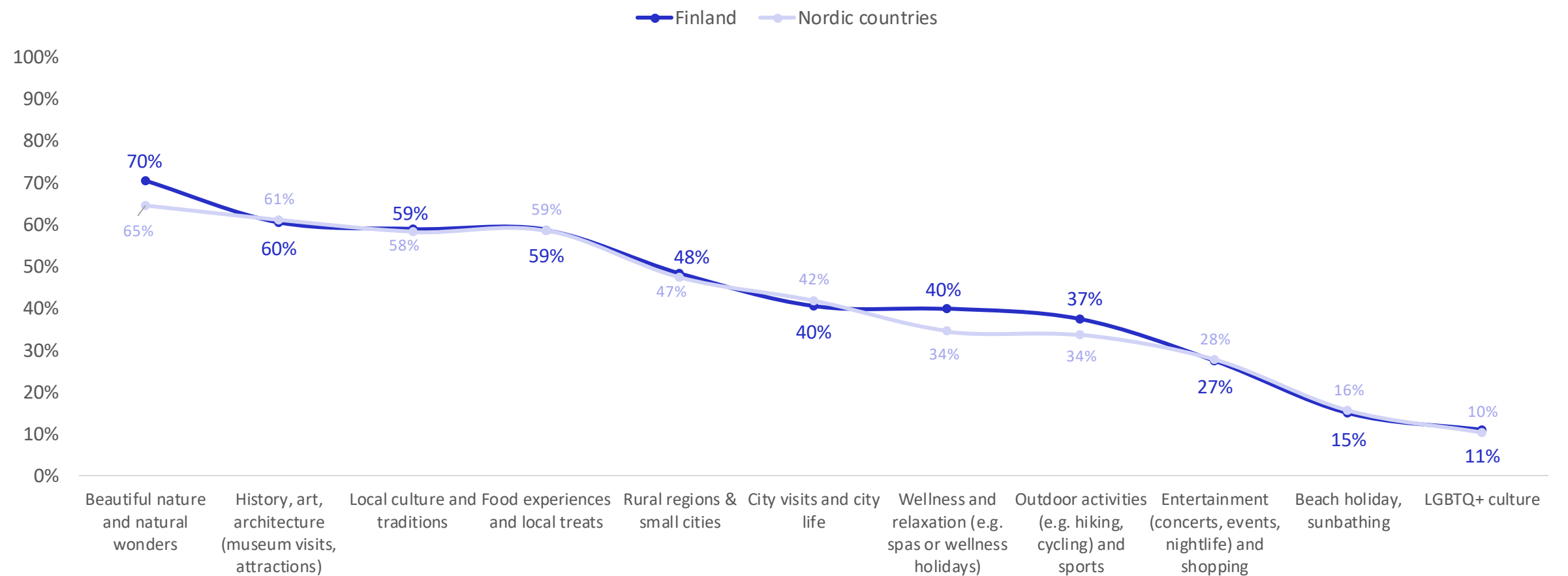
Finland is associated with well-being and outdoor activities more than other Nordic countries.

Linking travel themes to Finland and the Nordic countries

					Average
Beautiful nature and natural wonders	92%	88%	91%	79%	87%
Local culture and traditions	85%	83%	82%	82%	83%
History, art, architecture (museum visits, attractions)	80%	81%	79%	80%	80%
Food experiences and local treats	79%	76%	79%	79%	78%
Rural regions & small cities	74%	75%	74%	70%	73%
Wellness and relaxation (e.g. spas or wellness holidays)	66%	57%	55%	50%	57%
Outdoor activities (e.g. hiking, cycling) and sports	64%	60%	62%	49%	59%
City visits and city life	58%	63%	58%	63%	61%
Entertainment (concerts, events, nightlife) and shopping	40%	43%	40%	44%	42%
LGBTQ+ culture	23%	27%	21%	22%	23%
Beach holiday, sunbathing	20%	20%	21%	19%	20%

Finland is considered slightly more than other Nordic countries for nature, wellness and outdoor holidays.

Attractiveness of the Nordic countries by travel theme



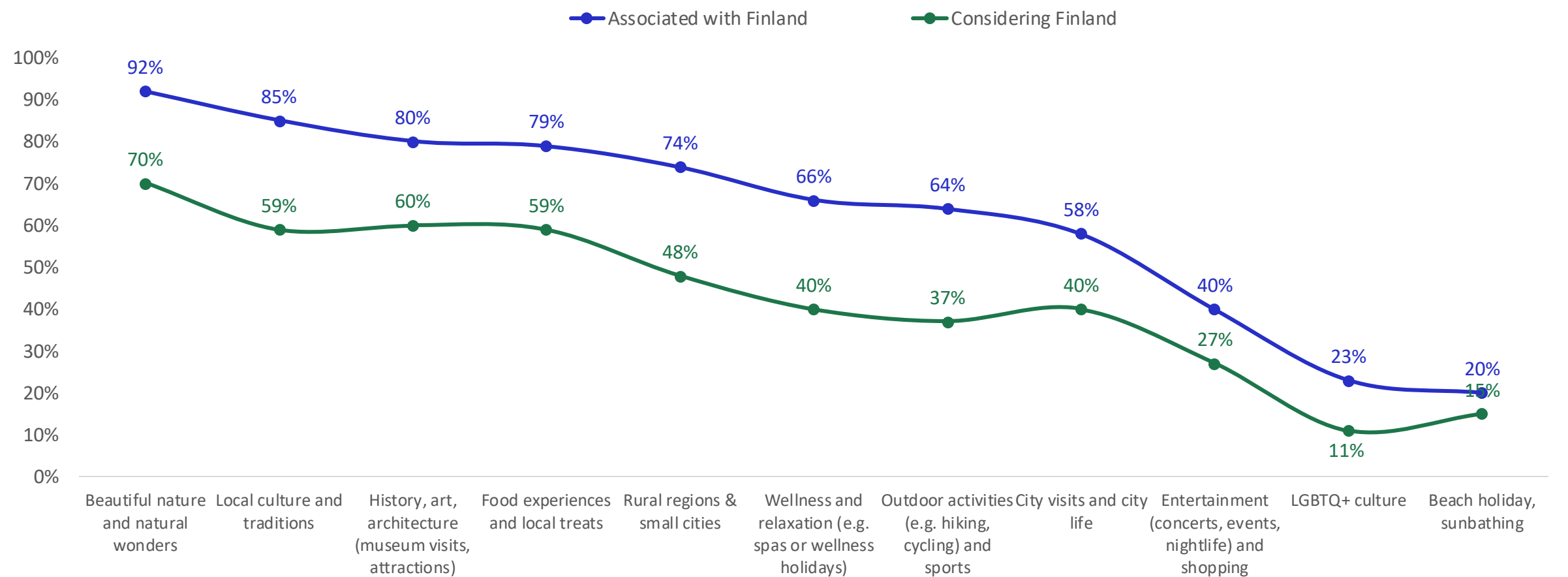
Of the other Nordic countries, Sweden and Denmark are considered a bit more for city holidays, and Denmark for entertainment and shopping.

Attractiveness of the Nordic countries by travel theme

					Average
Beautiful nature and natural wonders	70%	62%	66%	59%	59%
History, art, architecture (museum visits, attractions)	60%	61%	60%	63%	63%
Local culture and traditions	59%	55%	60%	58%	58%
Food experiences and local treats	59%	55%	62%	58%	58%
Rural regions & small cities	48%	46%	46%	48%	48%
City visits and city life	40%	43%	40%	44%	44%
Wellness and relaxation (e.g. spas or wellness holidays)	40%	32%	33%	33%	33%
Outdoor activities (e.g. hiking, cycling) and sports	37%	33%	34%	31%	31%
Entertainment (concerts, events, nightlife) and shopping	27%	25%	26%	32%	32%
Beach holiday, sunbathing	15%	13%	16%	18%	18%
LGBTQ+ culture	11%	10%	11%	10%	10%

Finland is most strongly associated with nature, culture, history and food experiences. Finland is also the most considered for these travel themes.

Merging and attracting travel themes, Finland



Country image: Nordic countries

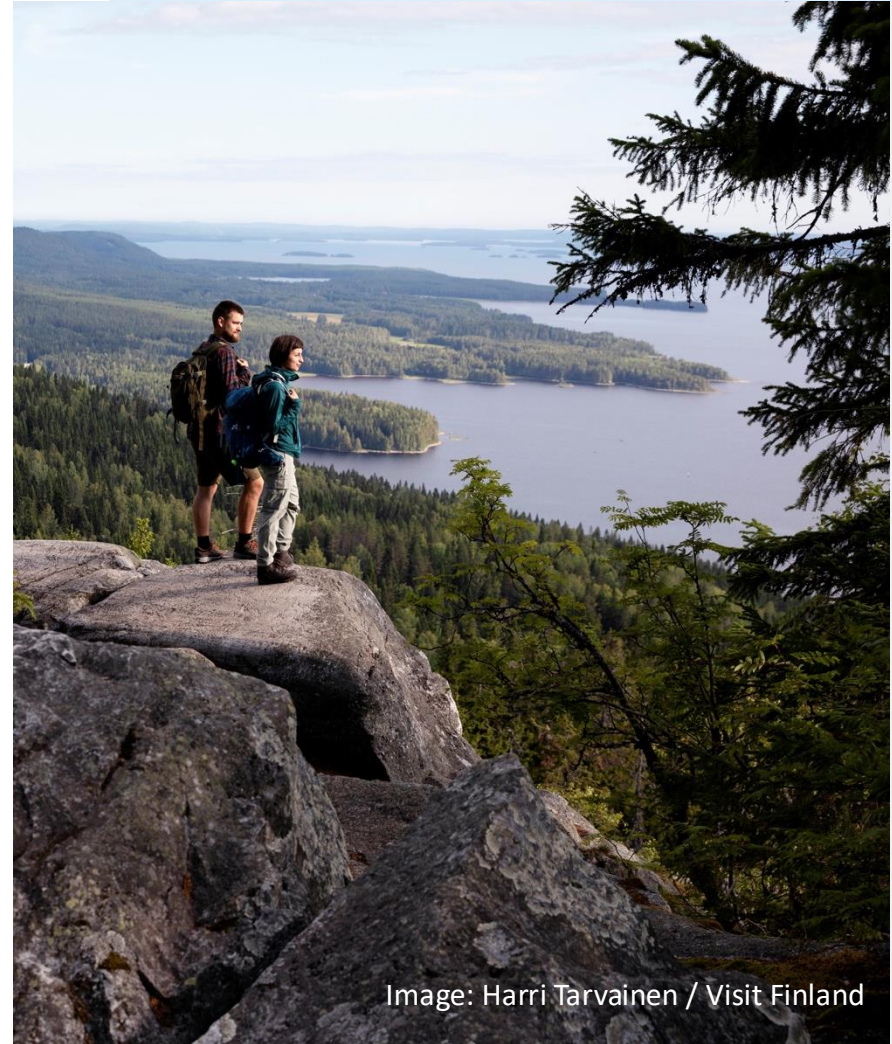
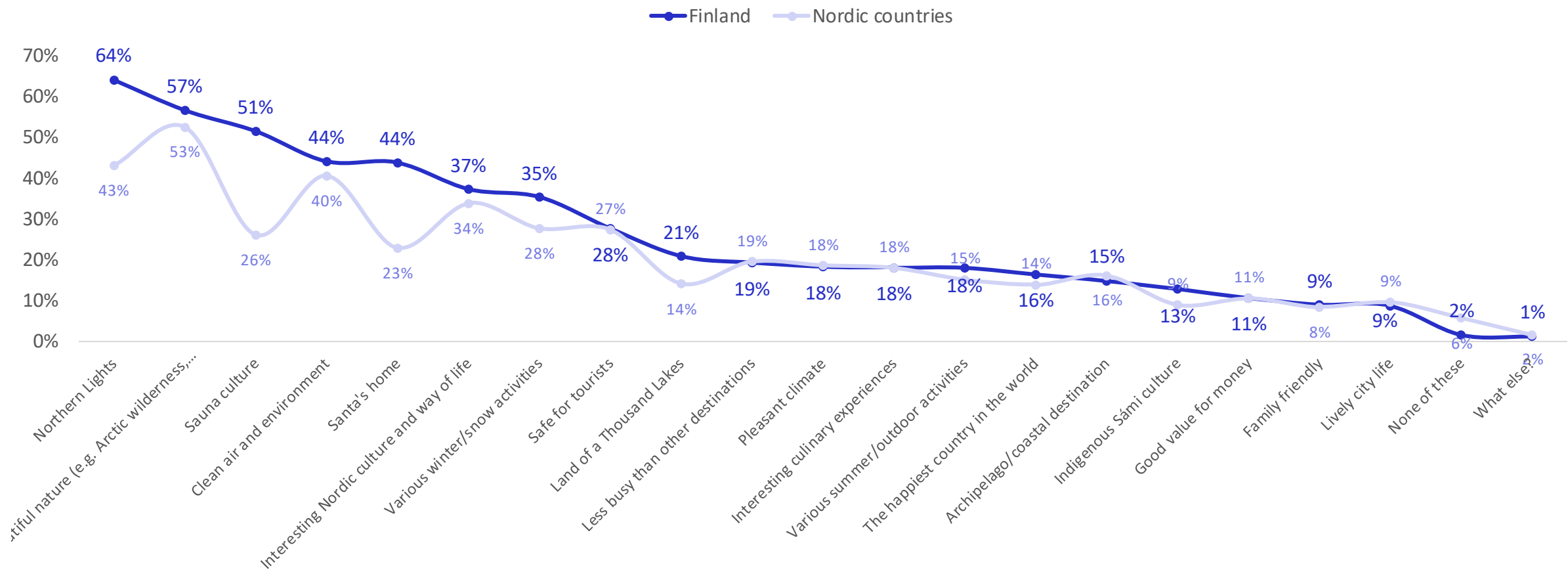


Image: Harri Tarvainen / Visit Finland

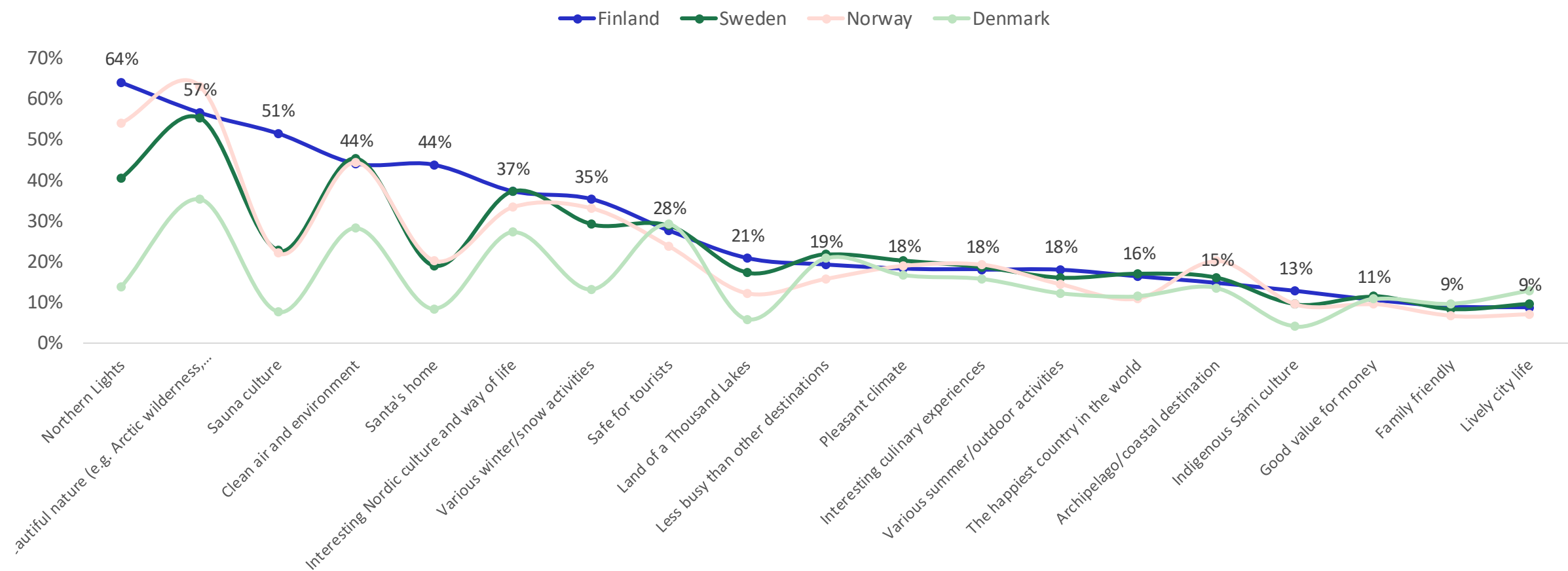
Finland's strongest images are the Northern Lights, beautiful nature and sauna culture. Finland's image is, overall, stronger than the average of the other Nordic countries.

Country image, Finland vs. Nordic countries



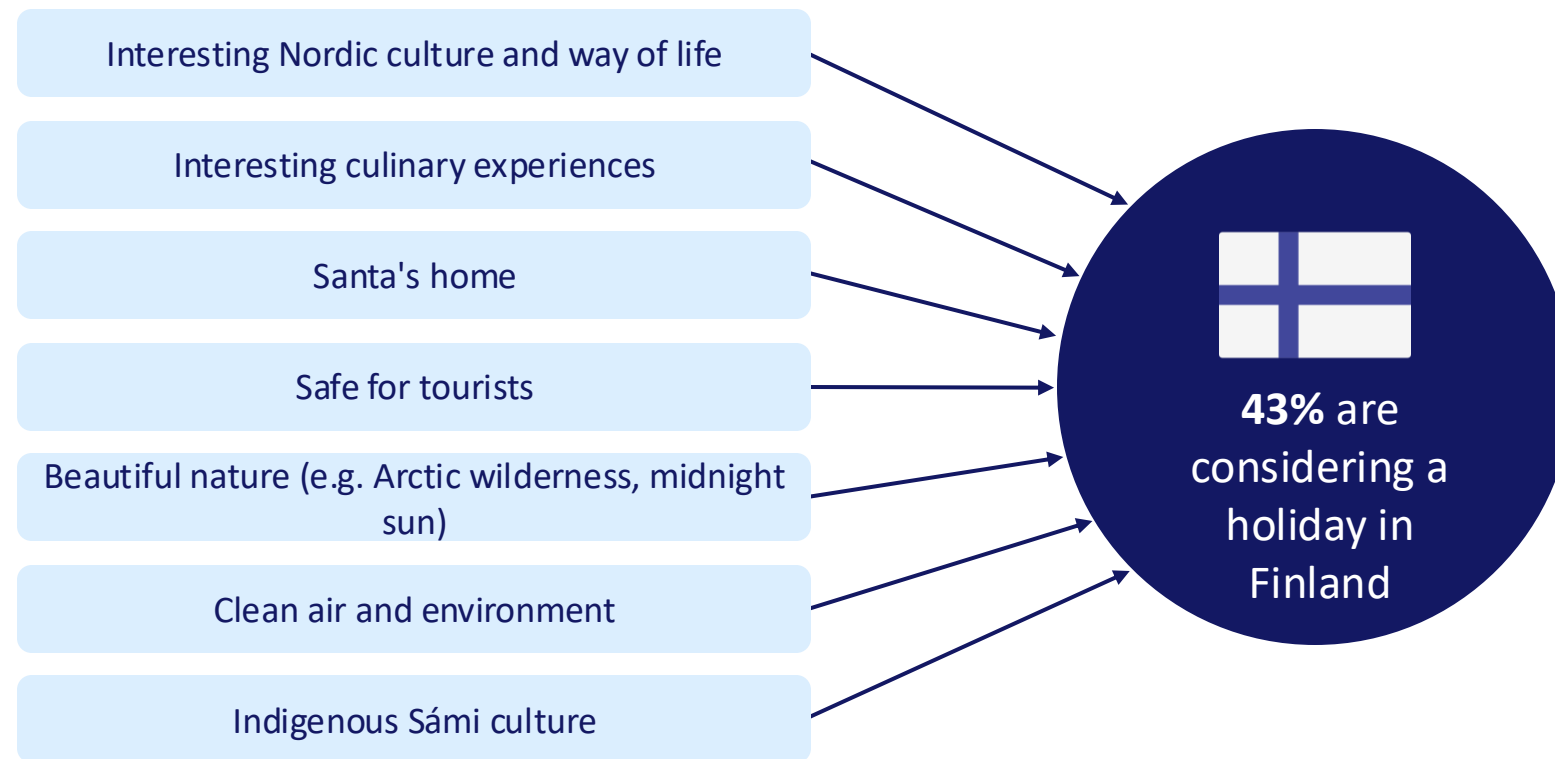
Finland's country image is slightly different from the other Nordic countries, Denmark's image is the weakest.

Country image



The most important drivers to consider Finland are the interesting Nordic lifestyle and culinary experiences.

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?

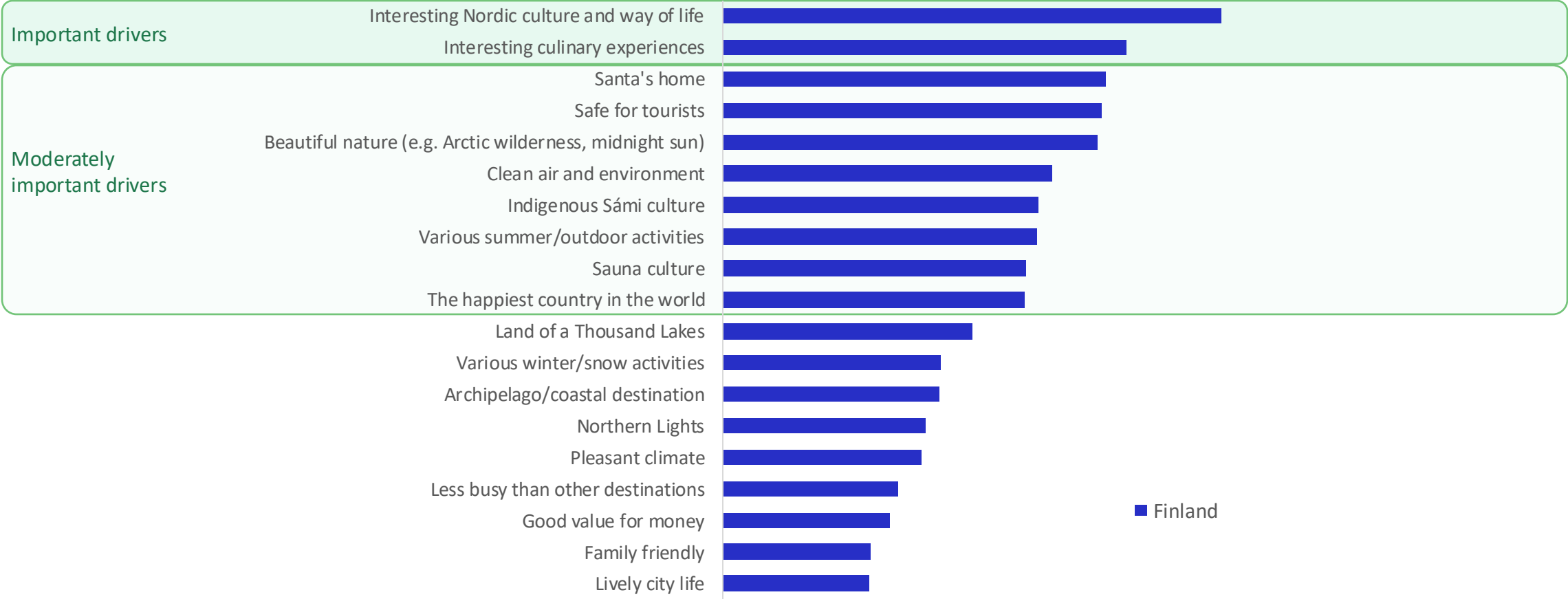
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

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

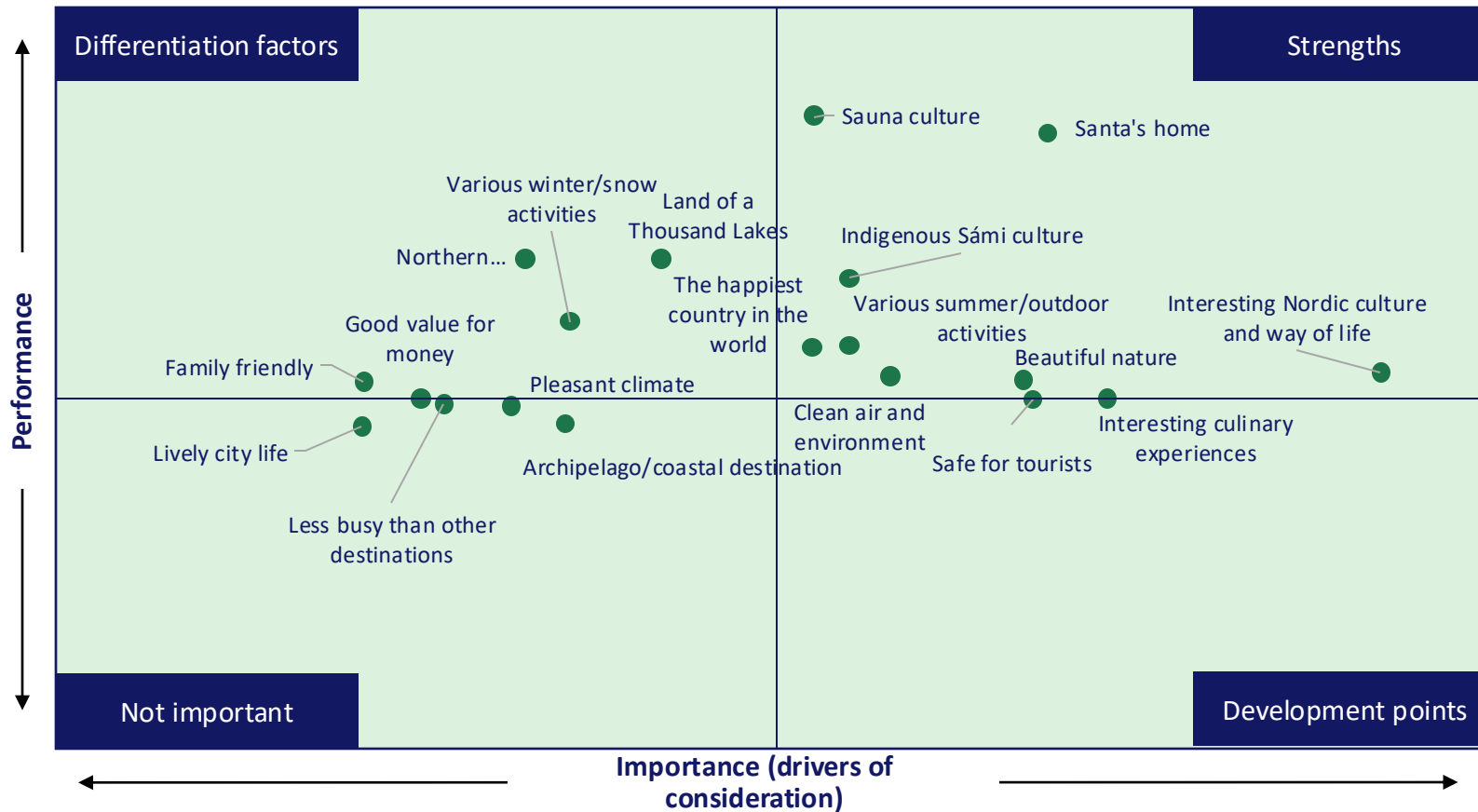
The most important drivers to consider Finland are the interesting Nordic lifestyle and culinary experiences.

Drivers of consideration



Most of the most important drivers of consideration are also Finland's strengths

Importance vs. Performance: Country image



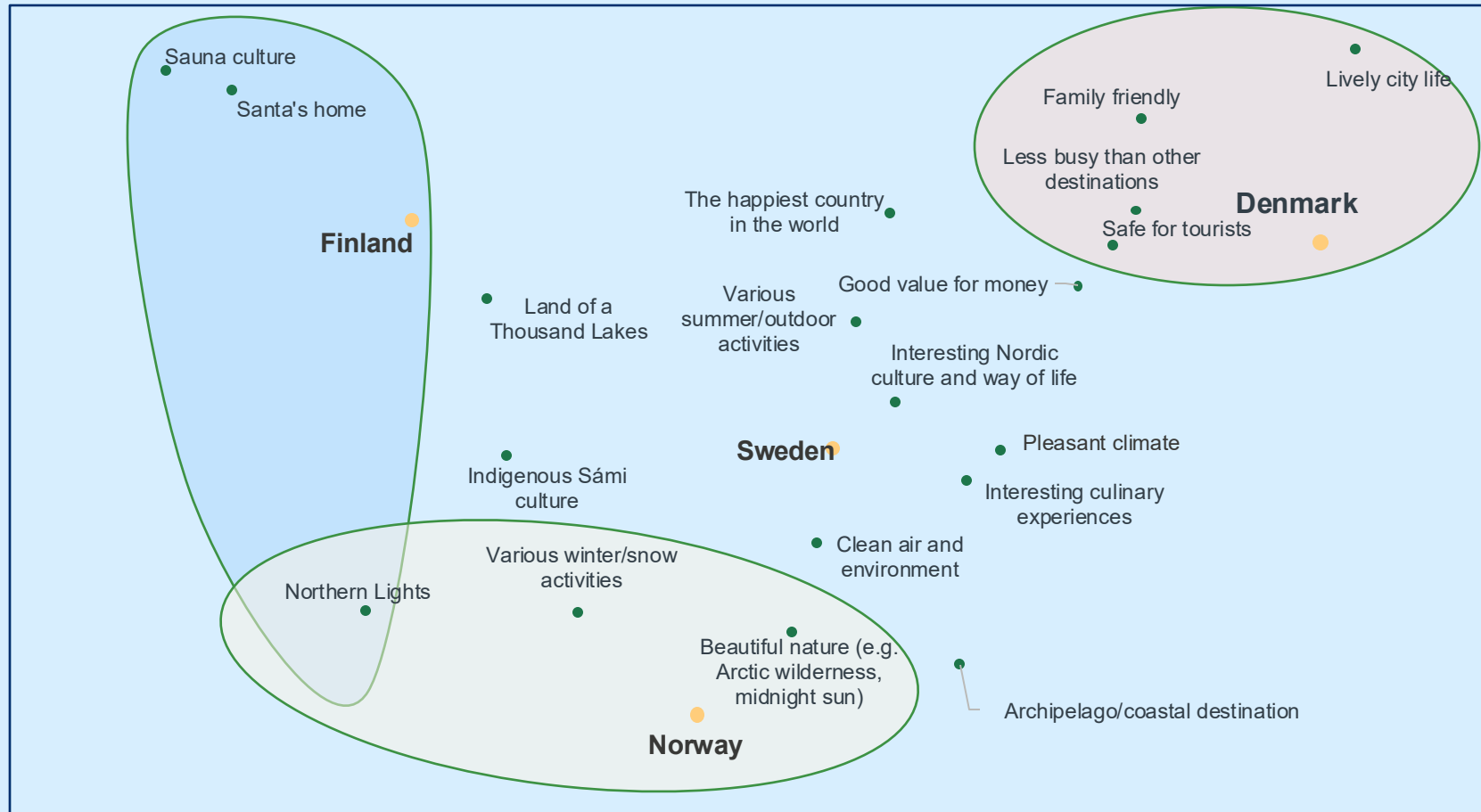
Comments

*Santa's home, sauna culture, indigenous Sámi culture, various summer/outdoor activities and the happiest country in the world are important drivers to consider Finland and also Finland's **current strengths** in relation to the other Nordic countries.*

*Important drivers where Finland performs **at the same level** as the other Nordic countries: **interesting Nordic culture and way of life, beautiful nature, clean air and environment, safety, and interesting culinary experiences.***

Finland's relative position clearly emphasises the sauna culture, Santa's home and the northern lights.

Country image, relative image



Comments

Finland's relative position clearly emphasises the sauna culture, Santa's home and the northern lights. The latter are also associated relatively strongly with Norway.

Indeed, Norway profiles itself a little more strongly as a nature and winter destination than others.

Denmark is positioned as an unhurried, family-friendly, and safe city destination.

Sweden is not clearly profiled in any image.

The image and attractiveness of Finnish food



Image: Soili Jussila / Vastavalo / Visit Finland

Fish, naturalness, healthiness and simplicity are highlights of Finnish cuisine

Spontaneous impression of Finnish cuisine

- **Fish (especially salmon) and seafood** are the strongest image of Finnish food among Japanese people.
- The food is seen as **natural, fresh, healthy and simple**, emphasising the taste of the ingredients themselves.
- The specialty and exoticism are especially related to **game, reindeer meat, berries and mushrooms**.
- The taste is often perceived as **gentle, light and approachable**, but some also consider it **monotonous or not particularly tasty**.
- **It's very common to be unfamiliar with it**, but curiosity and the desire to try Finnish food are common.
- **Price and availability** are mentioned as challenges in Japan.

"Salmon dishes really are delicious"

"Inventive seafood dishes"

"Fish dishes are tempting, but expensive."

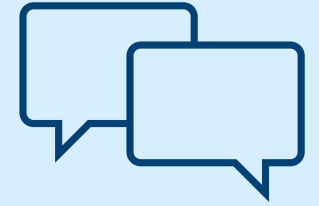
"Delicious fresh ingredients"

"Down-to-earth taste. I think it's lighter than other foods."

"I've actually only eaten one type, but it was so delicious that I think it's become my favourite food. Based on the information I received from the travel programs, fish dishes, such as salmon and herring, as well as sweets made from berries look delicious."

"Not very tasty"

"It was delicious, but there was nothing special about it"



Unfamiliarity of Finnish food is the main reason why Finland is not seen as a food destination.

Reasons why Finland is not seen as a food destination



Japanese people have tried Finnish cuisine the most

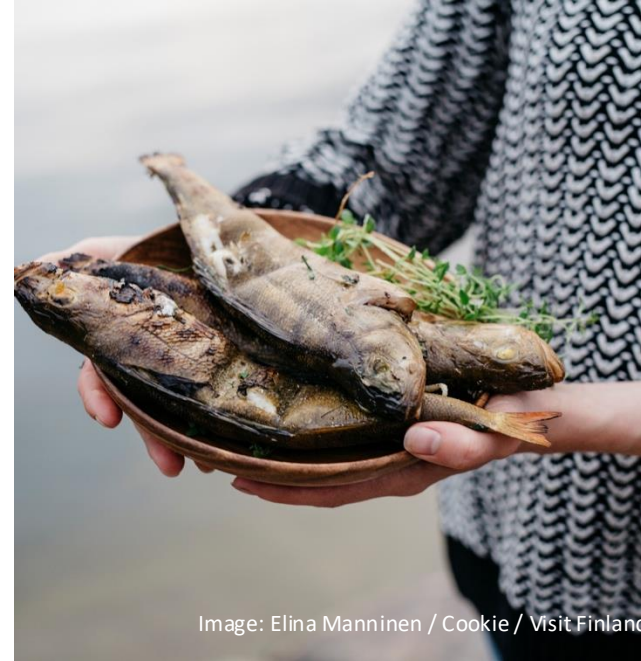


Image: Elina Manninen / Cookie / Visit Finland

Breads, pastries and berries

Karelian pie, cinnamon roll, bun, blueberry pie, Christmas gingerbread, rye bread, blueberry, cranberry

Other mentions

Salty liquorice, coffee, soups and pots

Salmon and fish based foods

Salmon soup, smoked, vendace, herring, seafood

Reindeer meat and other game

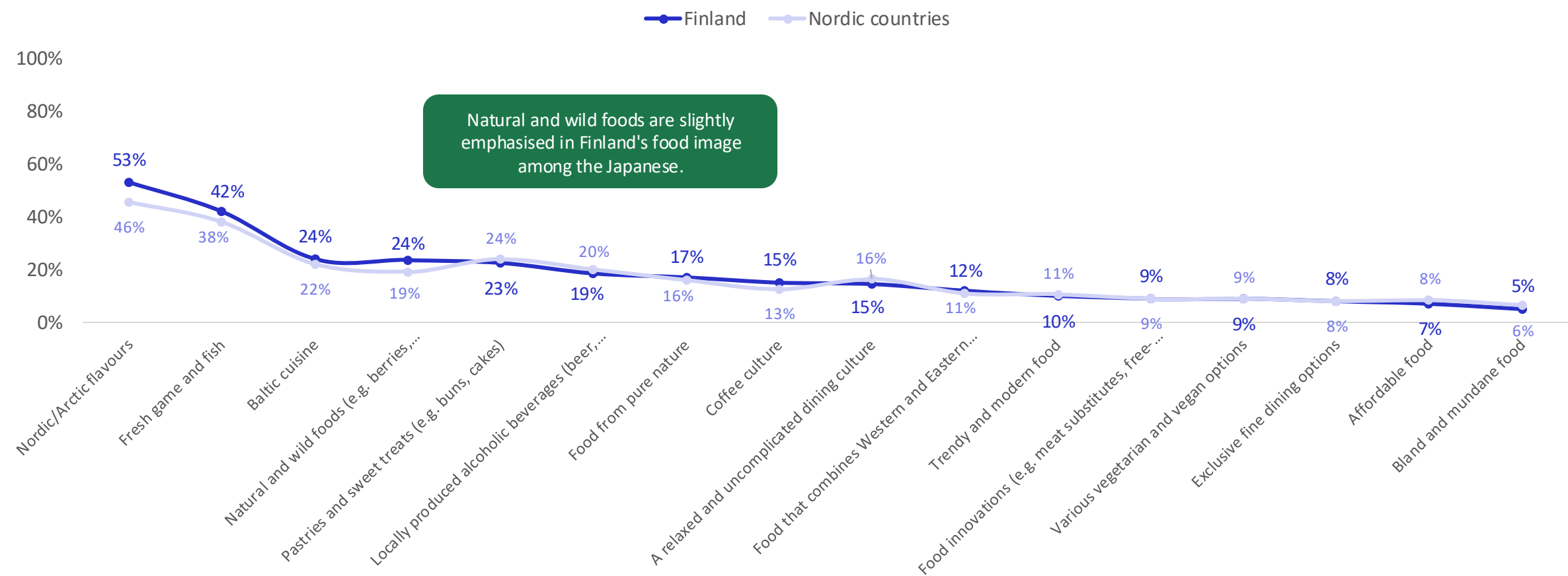
Deer, bear, game pots, meatballs



Image: Harri Tarvainen / Visit Finland

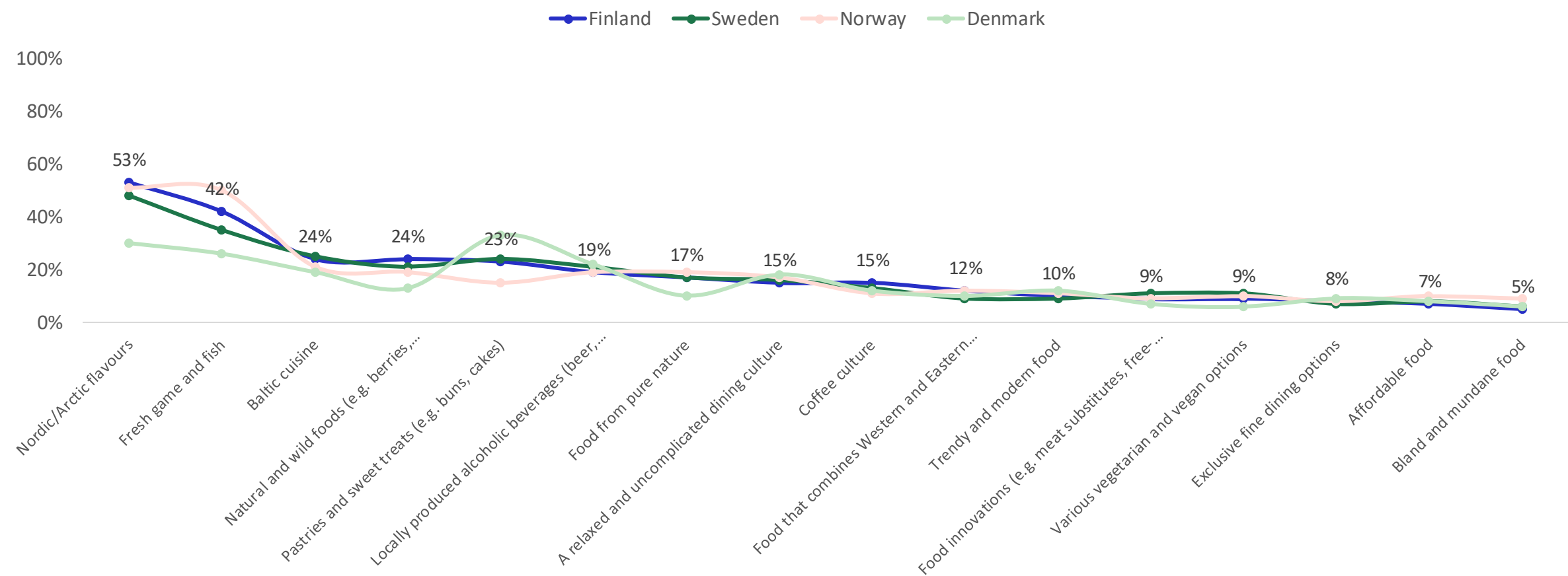
Nordic flavours, as well as fresh game and fish, are strongly associated with the Nordic countries, but more so in Finland.

Food image



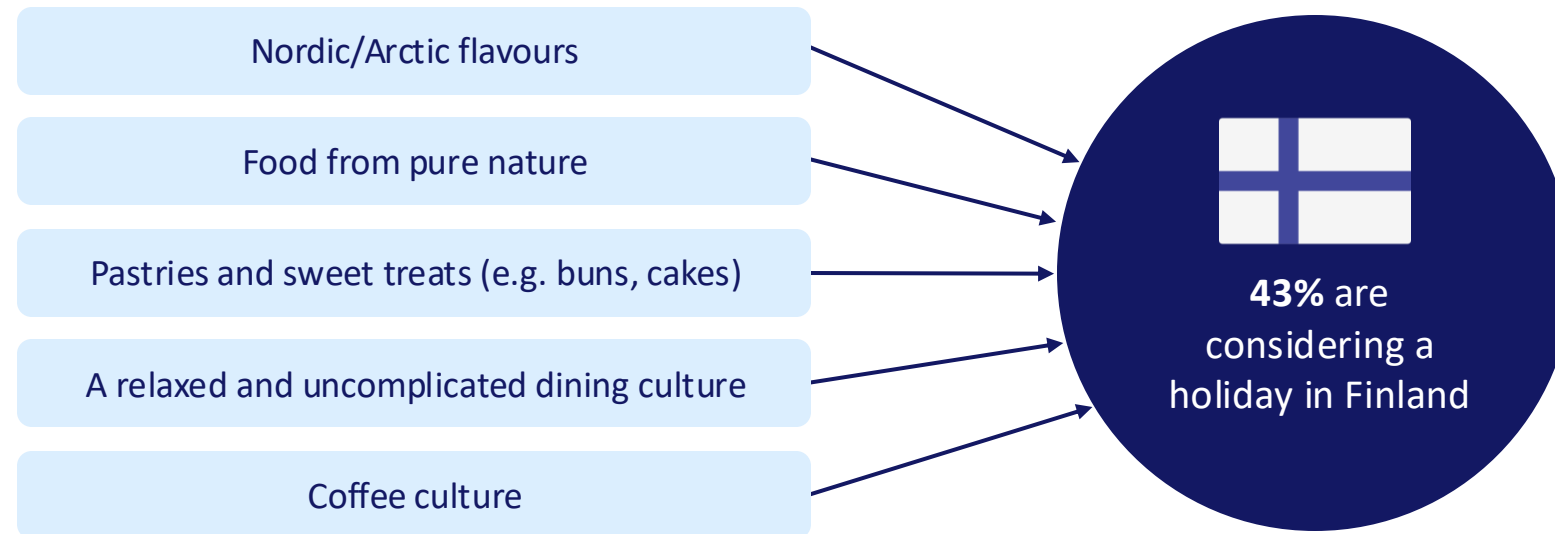
Denmark's food image differs slightly from other Nordic countries – Denmark is the country with the strongest profile as a pastry country.

Food image



Nordic flavours and food from pure nature are the most important food images for Finland to consider.

The most important attributes that drive consideration

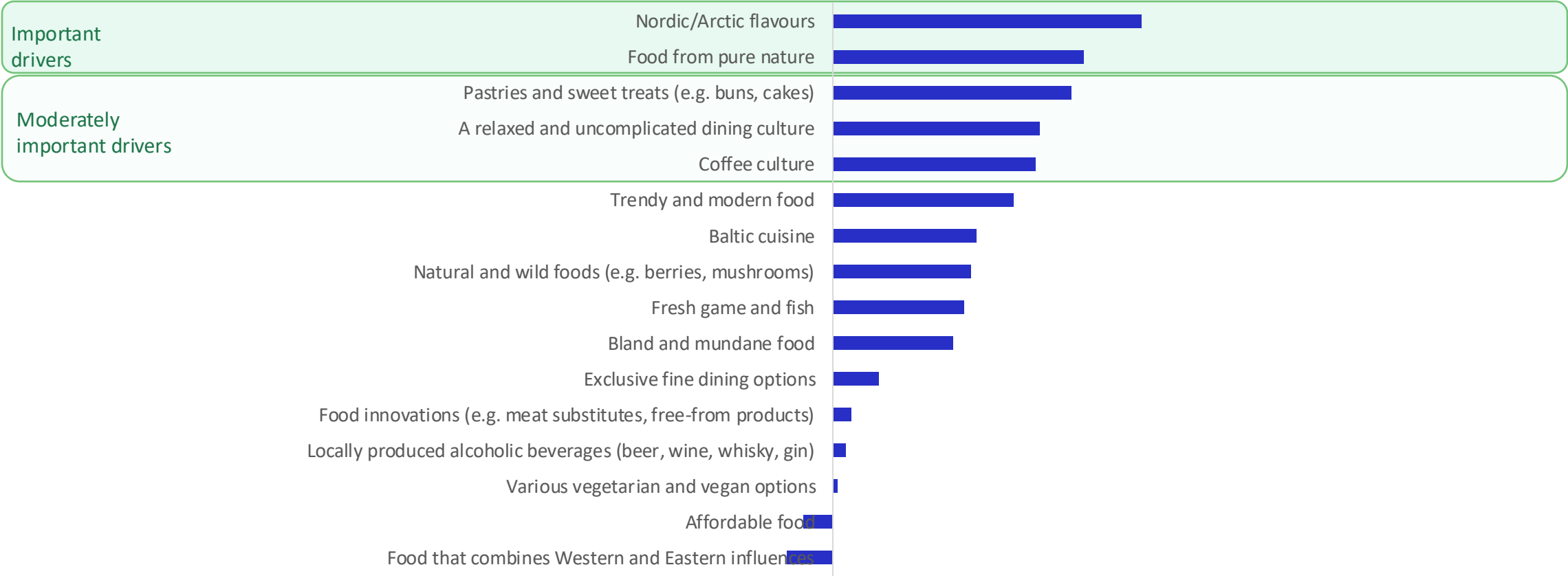


Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- 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?

In addition to Nordic flavors and pure natural food, pastries, coffee culture and relaxed dining culture matter.

Drivers of consideration

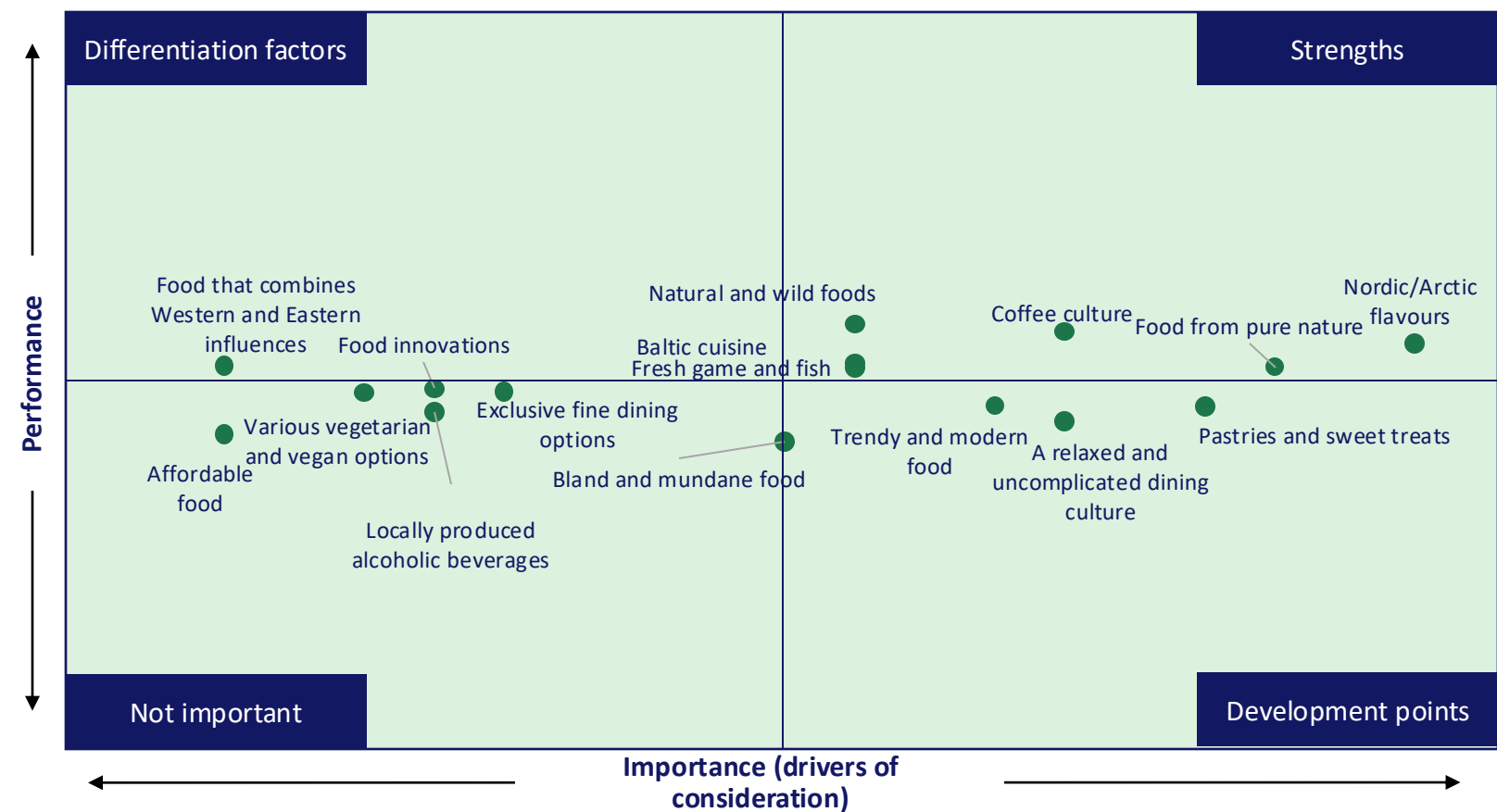


Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?: (Finland)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

Respondents: 18–65-year olds planning a holiday in the next three years 1003 IP

Finland's image regarding the most important decision drivers is mainly very close to the Nordic average.

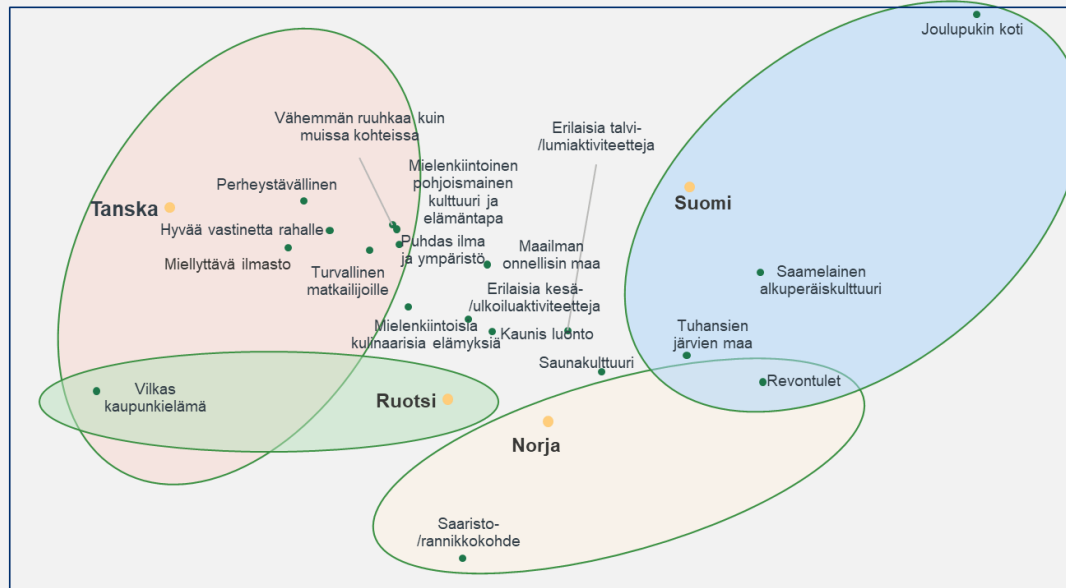
Importance vs Performance: Food image



Comments

According to Japanese people, Finland's food image is close to that of the other Nordic countries, but Finland stands out slightly in terms of *Nordic flavours* and *coffee culture*. In addition to the above, Finland could use *pastries*, *a relaxed food culture*, and *food from pure nature* to boost the level of consideration among the Japanese.

HOW TO READ THE MIND MAP



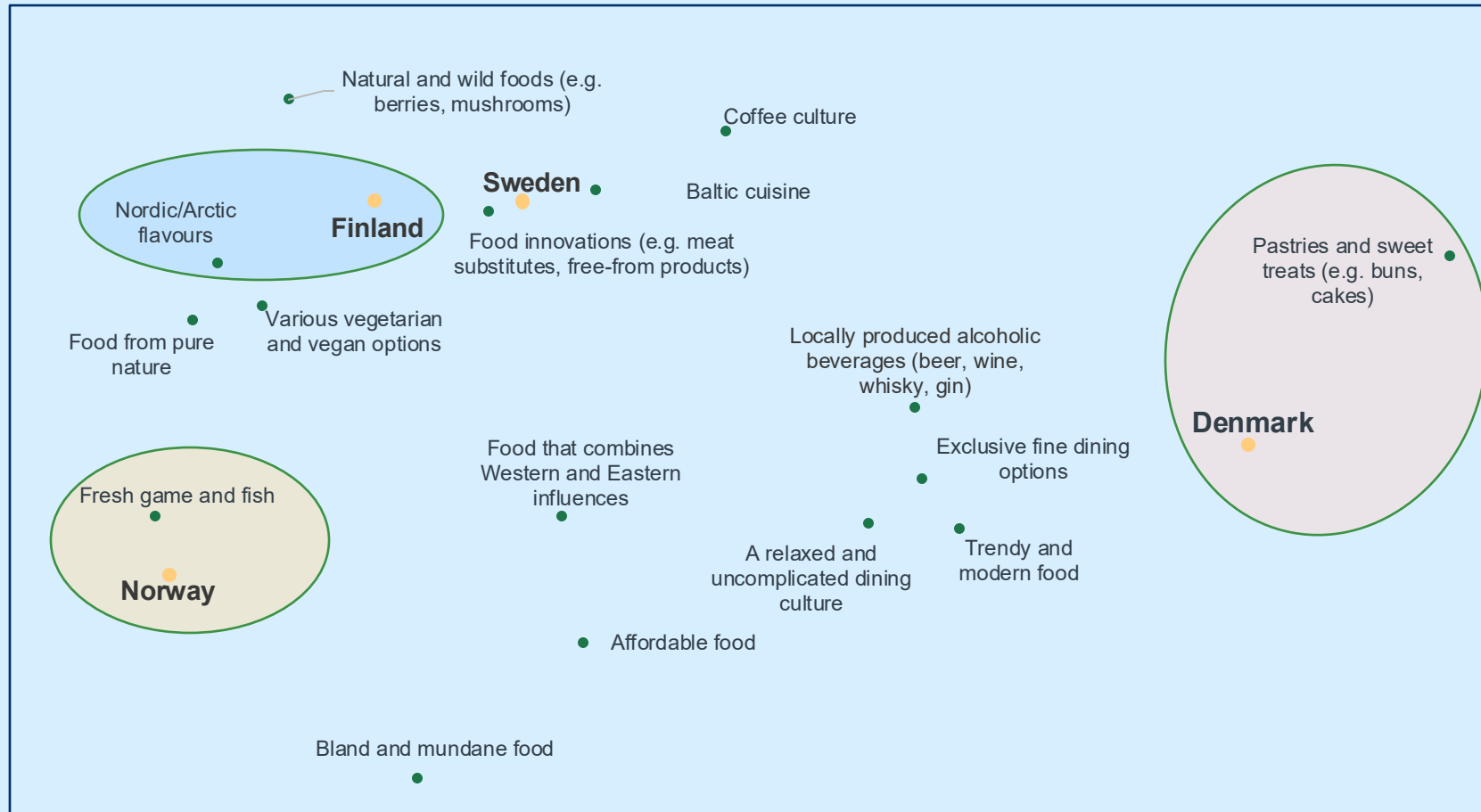
The positioning map visualises how tourists experience different countries and the images associated with them.

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.

The Nordic flavours are relatively stronger in Finland's image compared to the other Nordic countries.

Food image, relative image

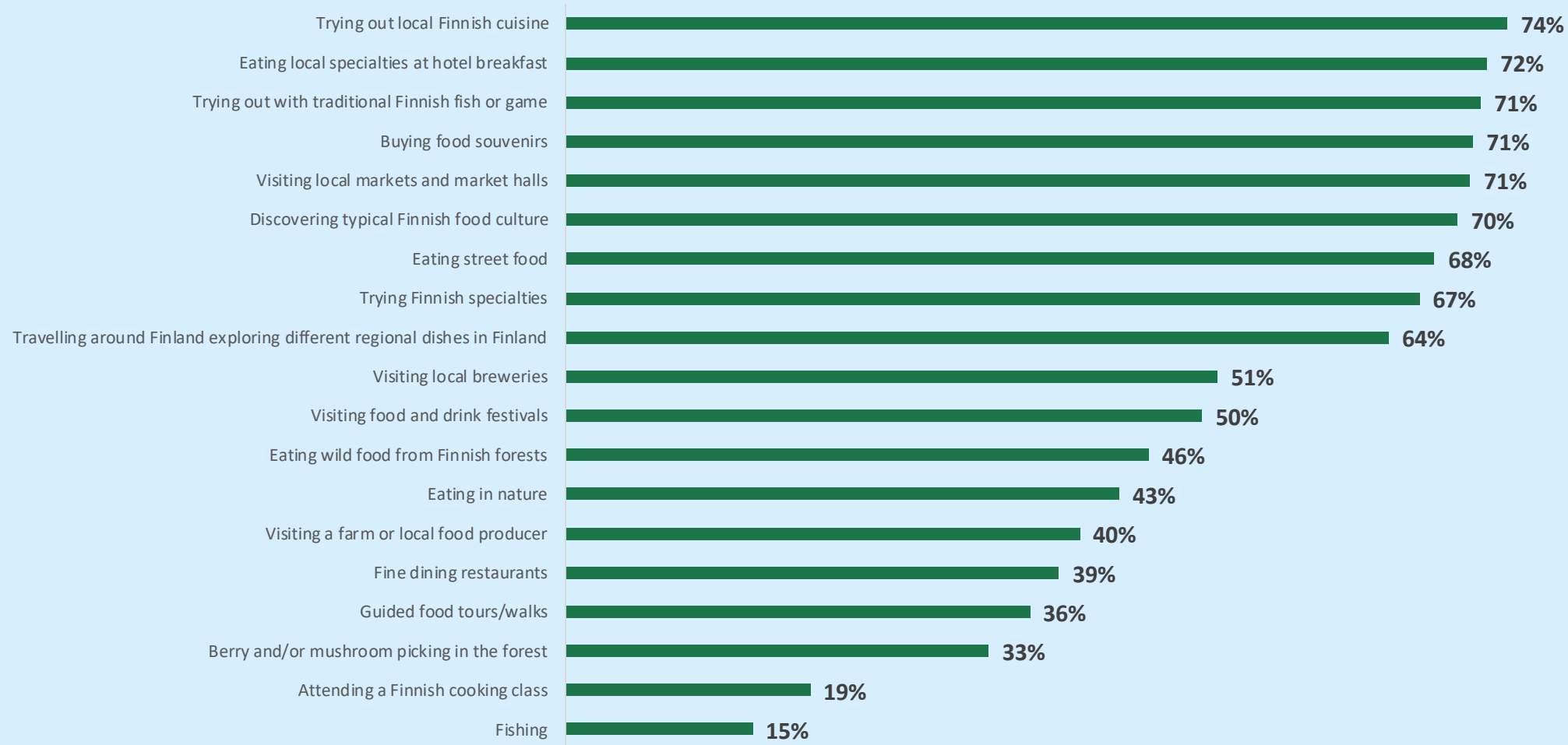


Comments

The food image of the Nordic countries is largely similar, although certain countries also have individual image profiles.

The Nordic/Arctic flavours are slightly stronger in Finland's image, relatively. Norway's image emphasizes fresh game and fish. In Denmark's position, pastries and sweet treats stand out.

Japanese people are most interested in trying local dishes and specialties, but less interested in food-related activities.



The market landscape and outdoor dining images are most attractive.



1. 45%



2. 42%



3. 41%



4. 30%



5. 27%



6. 23%



7. 17%



8. 16%



9. 11%

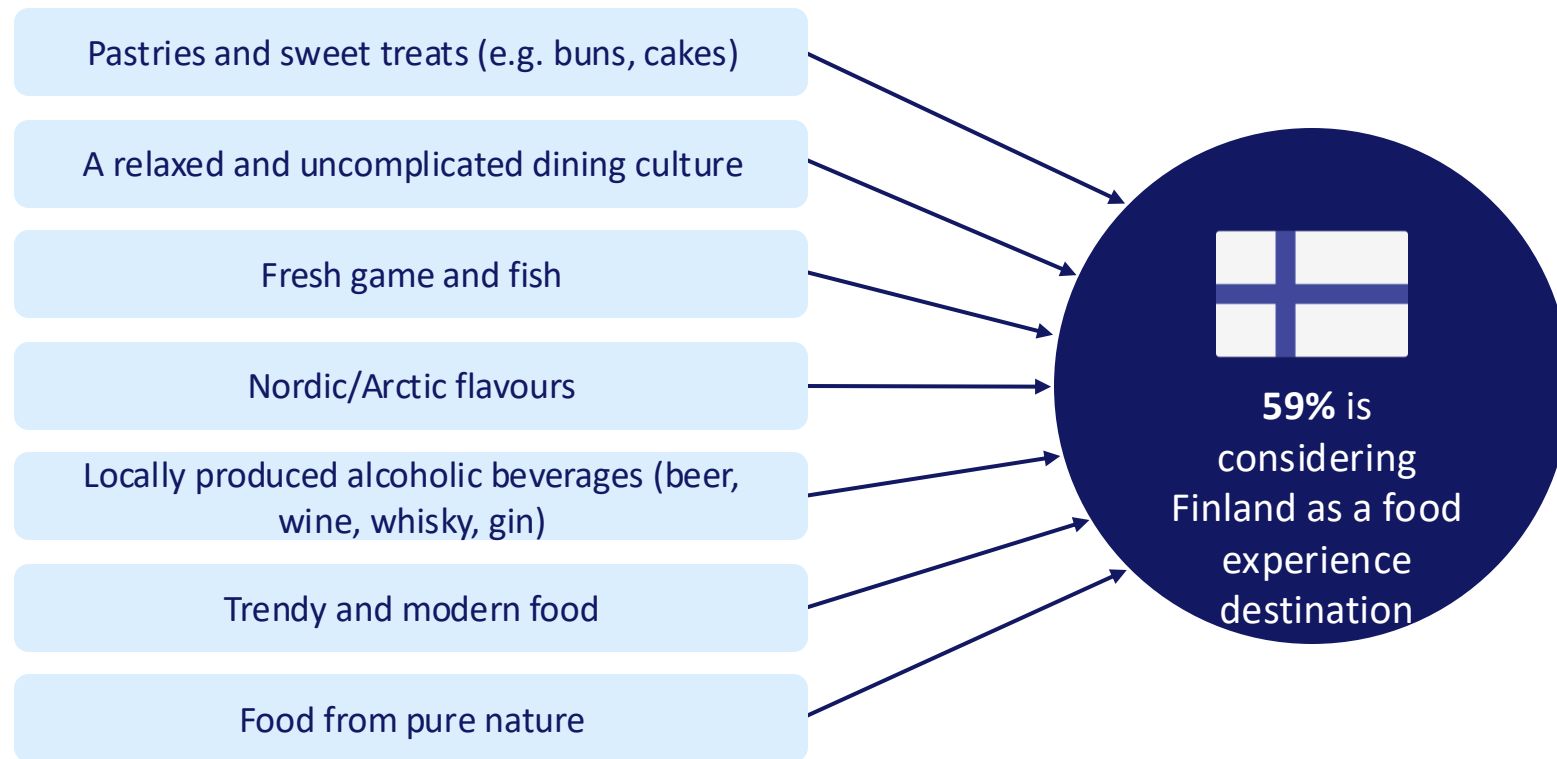
What influenced the selection of your favourite photos?

The choices of Japanese people emphasize the experience and desire to experience Finnish nature and the Nordic atmosphere. Atmosphere, tranquility and aesthetics were important in choosing a favourite image. The favourite images conveyed the peculiarities of Finnish cuisine, the richness of nature and a unique atmosphere that you can't experience at home.

Appendices

Pastries and the straightforward dining culture are the most important drivers for considering Finland as a food destination

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



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?

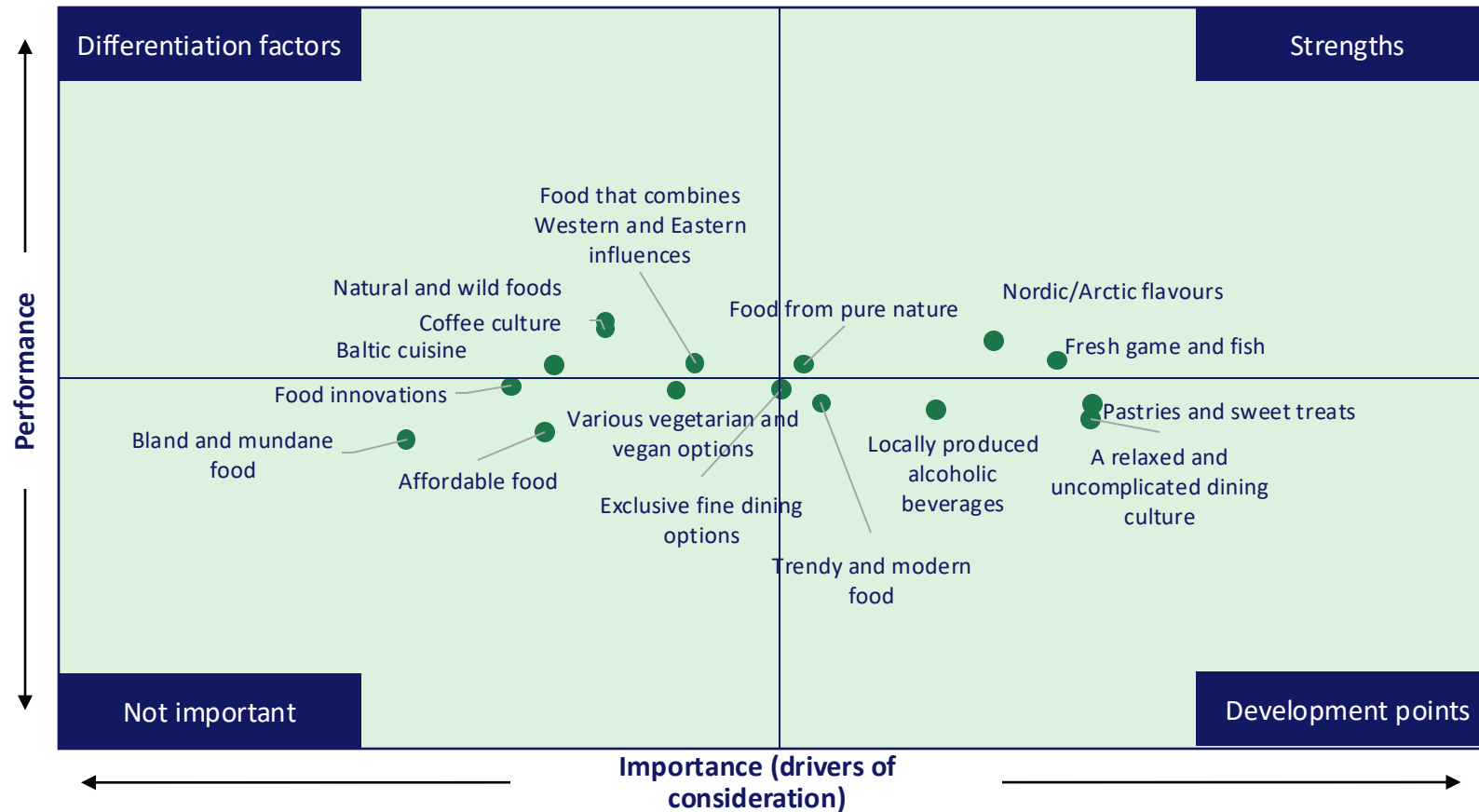
The most important drivers for considering Finland as a food destination are pastries and sweet treats, the relaxed food culture, and fresh game and fish.

Attributes driving Finland's consideration as a food travel destination



The strengths of Finland's food image are Nordic flavours as well as fresh game and fish.

Importance vs Performance: Food image



Comments

According to Japanese people, Finland's food image is close to that of the other Nordic countries, but Finland stands out slightly in terms of *Nordic flavours* and *fresh game and fish*. With *pastries*, *relaxed food culture* and *local alcoholic beverages*, Finland could boost its food tourism consideration among Japanese people.

Natural and wild foods and *coffee culture* can be differentiating factors for Finland, although they are not the most important drivers of food tourism.