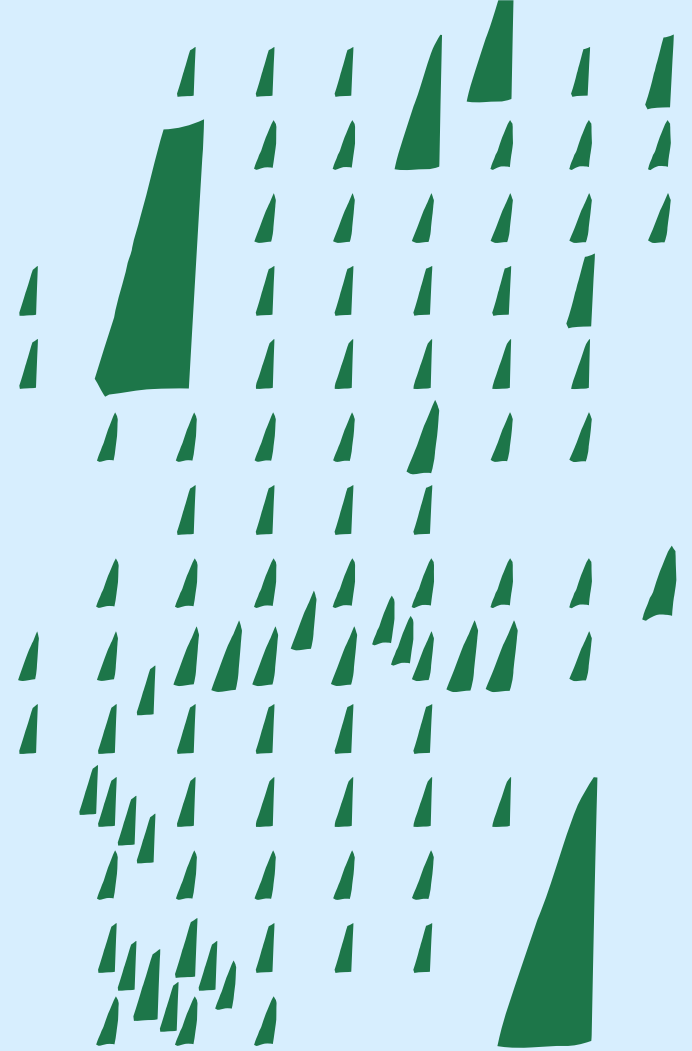


SPAIN

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

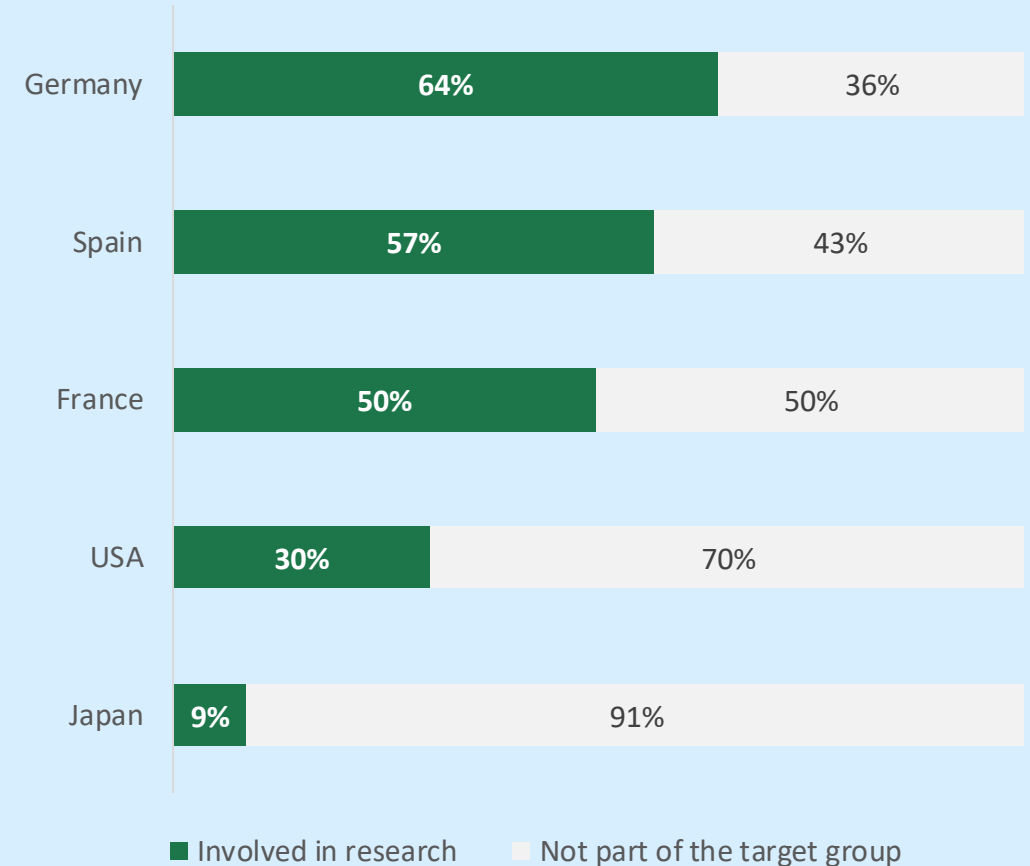
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

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 SPAIN



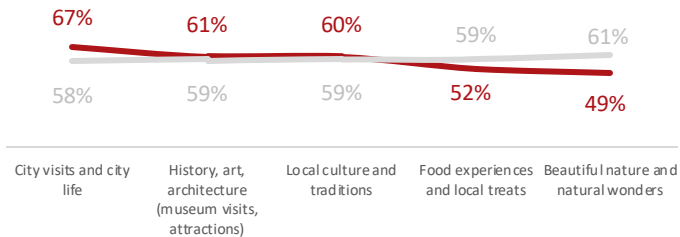
■ Espanja ■ Kaikki markkinat



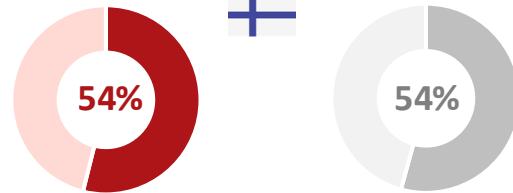
SEGMENTS



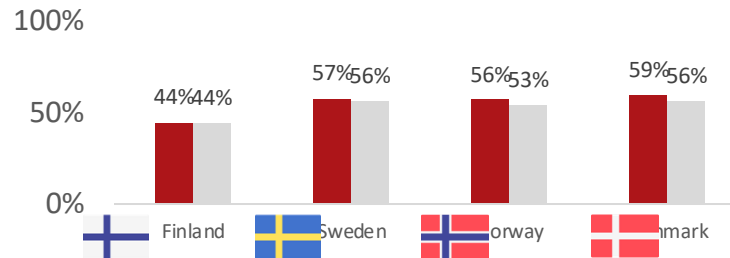
THE MOST INTERESTING TRAVEL THEMES



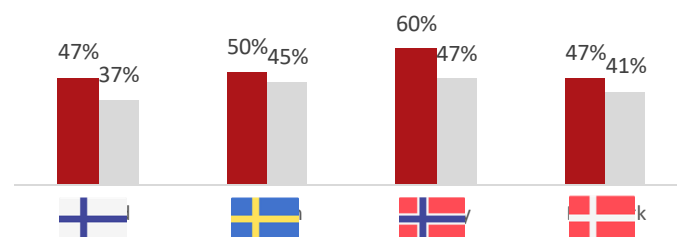
THE ATTRACTIVENESS OF FINLAND AS A FOOD TOURISM DESTINATION



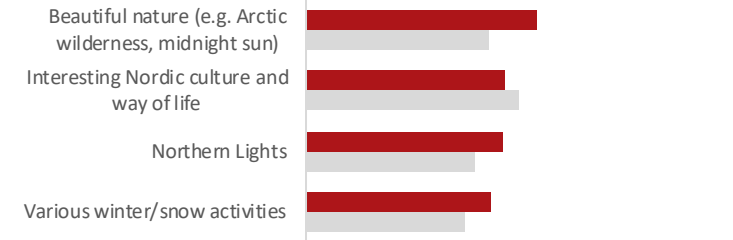
AWARENESS OF THE NORDIC COUNTRIES



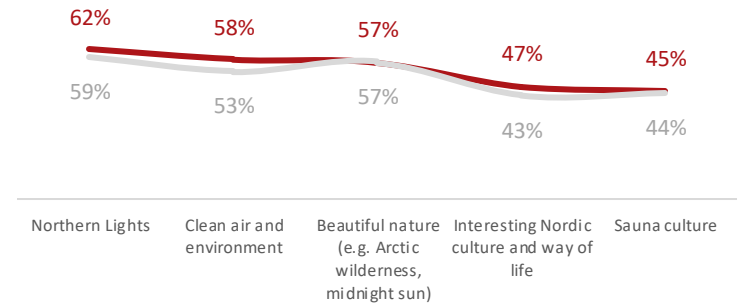
CONSIDERATION OF THE NORDIC COUNTRIES



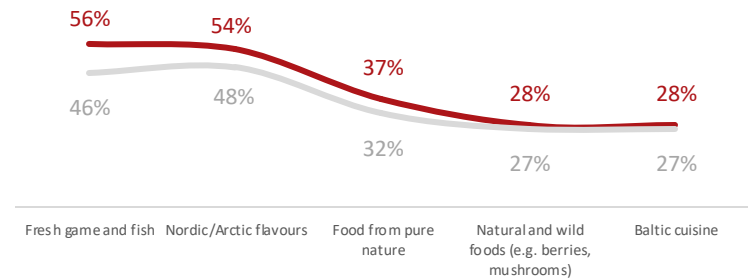
MOST IMPORTANT DRIVERS OF CONSIDERATION FOR FINLAND



TOP 5 COUNTRY IMAGES OF FINLAND



TOP 5 FOOD IMAGES IN FINLAND



Summary SPAIN

SPANIARDS AS TOURISTS



Spaniards are most interested in **city holidays, history and local culture**. They mainly find information about destinations through **search engines and loved ones**, and **online travel agencies** are used a little more in Spain than usual.

Finland is the least known Nordic country for Spaniards, but they consider it as a destination as often as Sweden and Denmark. The main barriers to travel are limited knowledge, price, and climate. In the Spanish imagination, **Finland is best described by the northern lights, clean air, beautiful nature. The sauna culture, Santa's home and thousands of lakes** set Finland apart from the other Nordic countries. The image of Finland among Spaniards is as strong as or stronger than that of Norway, which is the most considered Nordic country as a travel destination.

Finland's attraction factors are especially **the beautiful nature, interesting Nordic culture, northern lights, and winter activities**. Northern Lights, winter activities, lakes and sauna culture are Finland's clearest strengths compared to other Nordic countries.

RELATION TO FOOD



When travelling, Spaniards are interested in **local dishes and new flavours** in particular, but **connection to others and familiar flavours** are also important. Finnish cuisine is often associated with **fish, naturalness, healthiness and simplicity**. The unfamiliarity and attractiveness of Finnish food are the biggest barriers of food tourism to Finland.

Those who have tasted Finnish food remember **fish and reindeer in particular**, but they **also mention pastries**. The Nordic food image consists of fresh fish, game and Nordic flavours. **Finland stands out slightly when it comes to wild food, while trendy and modern food is more strongly linked to the other Nordic countries**. Denmark is known for its relaxed food culture, and Sweden and Denmark are more associated with pastries than Finland.

The most important attraction factors for those considering Finland are **Nordic flavours, food from pure nature, and natural and wild foods**. Finland performs almost as well as the other Nordic countries in these drivers, and its **strengths are particularly in natural and wild foods**.

SPANIARDS VS OTHERS



Unlike other market segments, Spaniards are **less interested in nature and beach resorts**.

More than the other markets, Spaniards clearly want to **stick to familiar flavors when they travel**. Compared to other markets, Spaniards are **interested in fine dining restaurants rather than affordable dining options** and are **willing to invest in dining experiences**.

Finland's attraction to Spaniards is based in particular on **beautiful nature and thousands of lakes, which are more pronounced for them than the other markets**. Also in **food tourism, nature is a key factor: food from pure nature and natural foods** are key reasons for Spaniards to consider Finland.

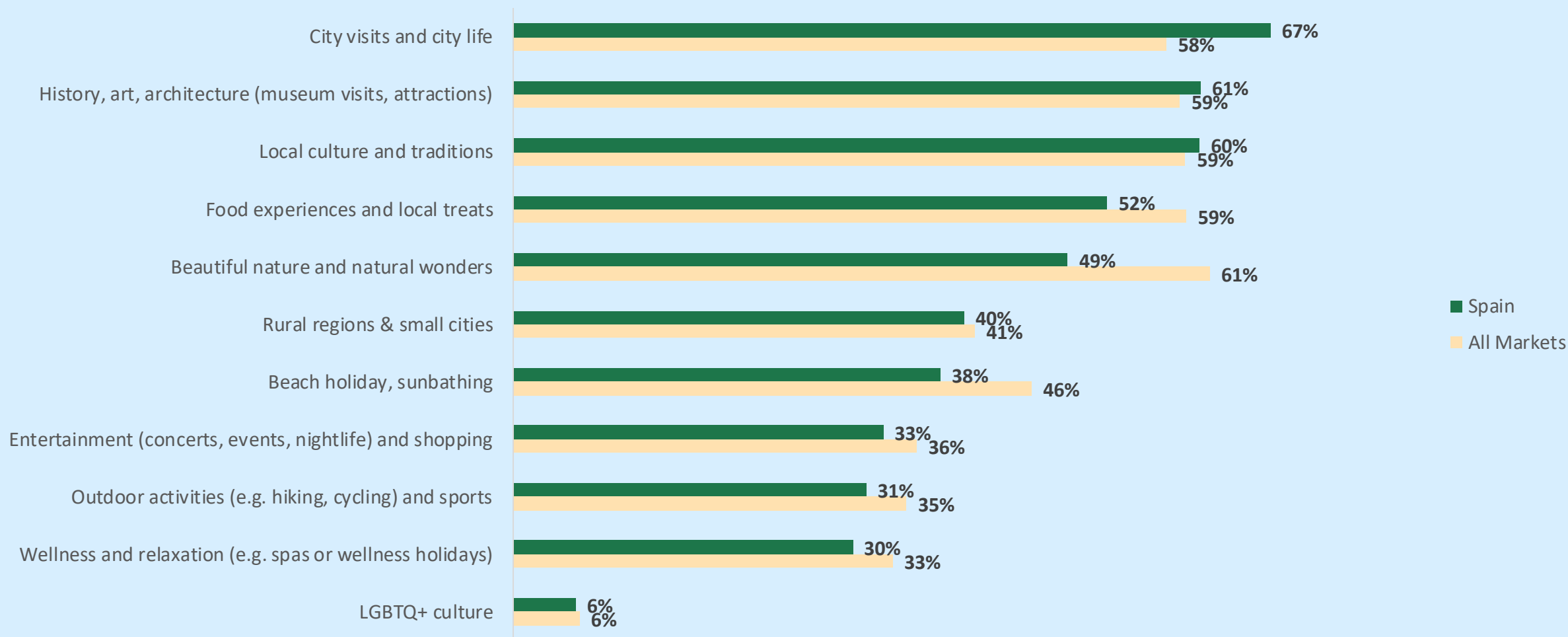
Travel behaviour & Interests



Image: Elina Manninen / Visit Finland

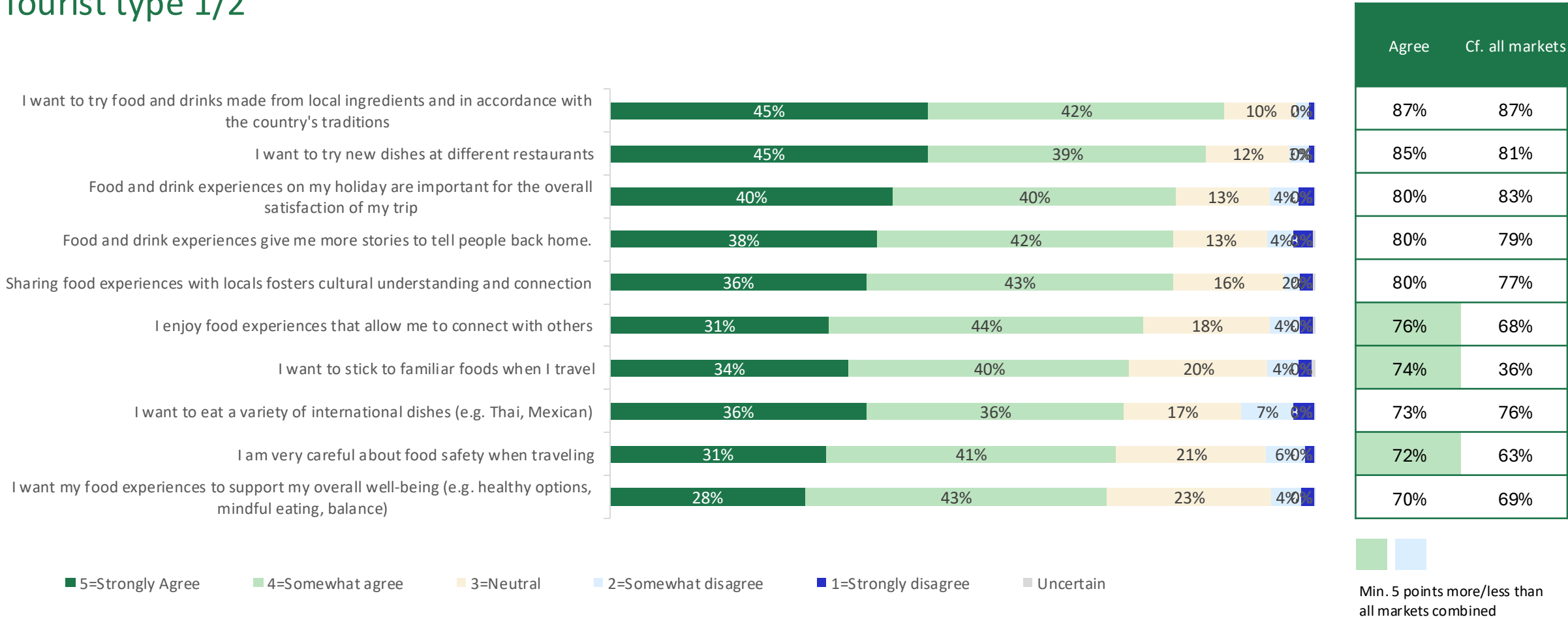
Spaniards are most interested in city visits, history and local culture, less in nature and beach resorts

Travel Themes



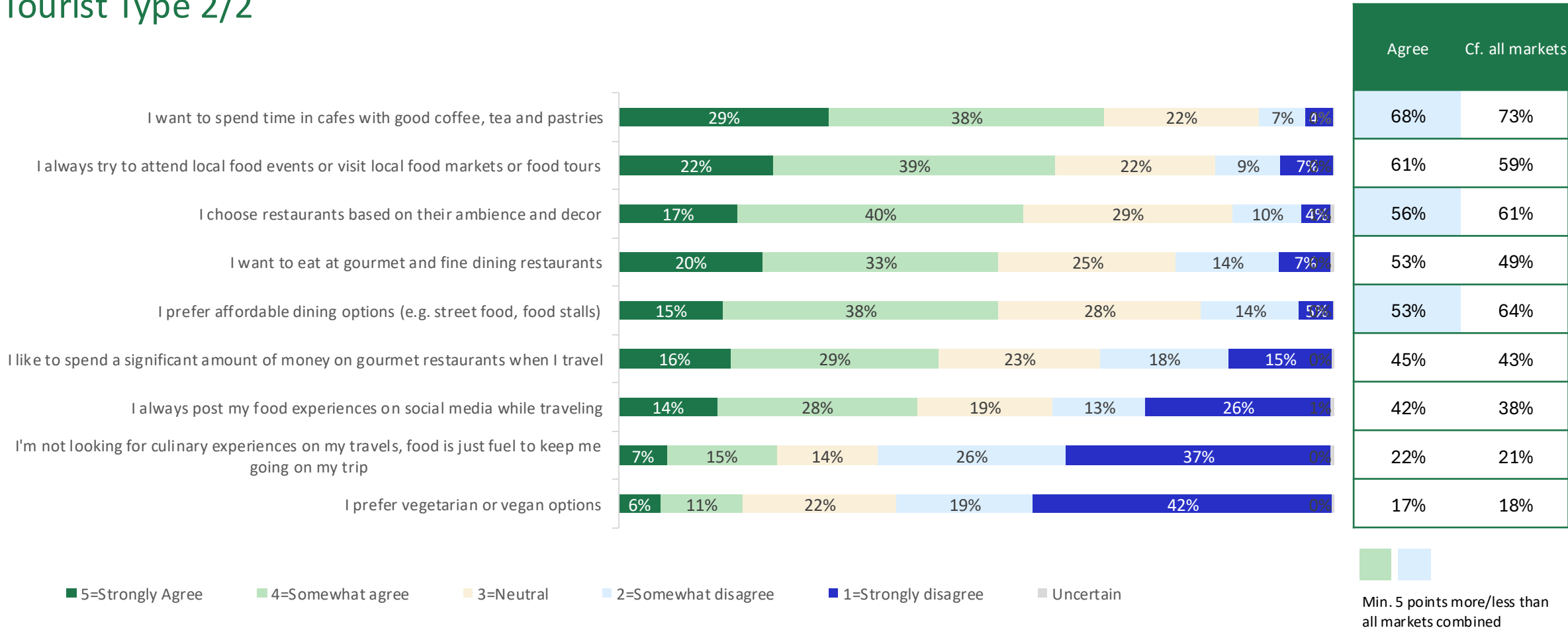
Spaniards are most interested in local food and new flavors. However, Spaniards are clearly more inclined to stick to familiar tastes when they travel.

Tourist type 1/2



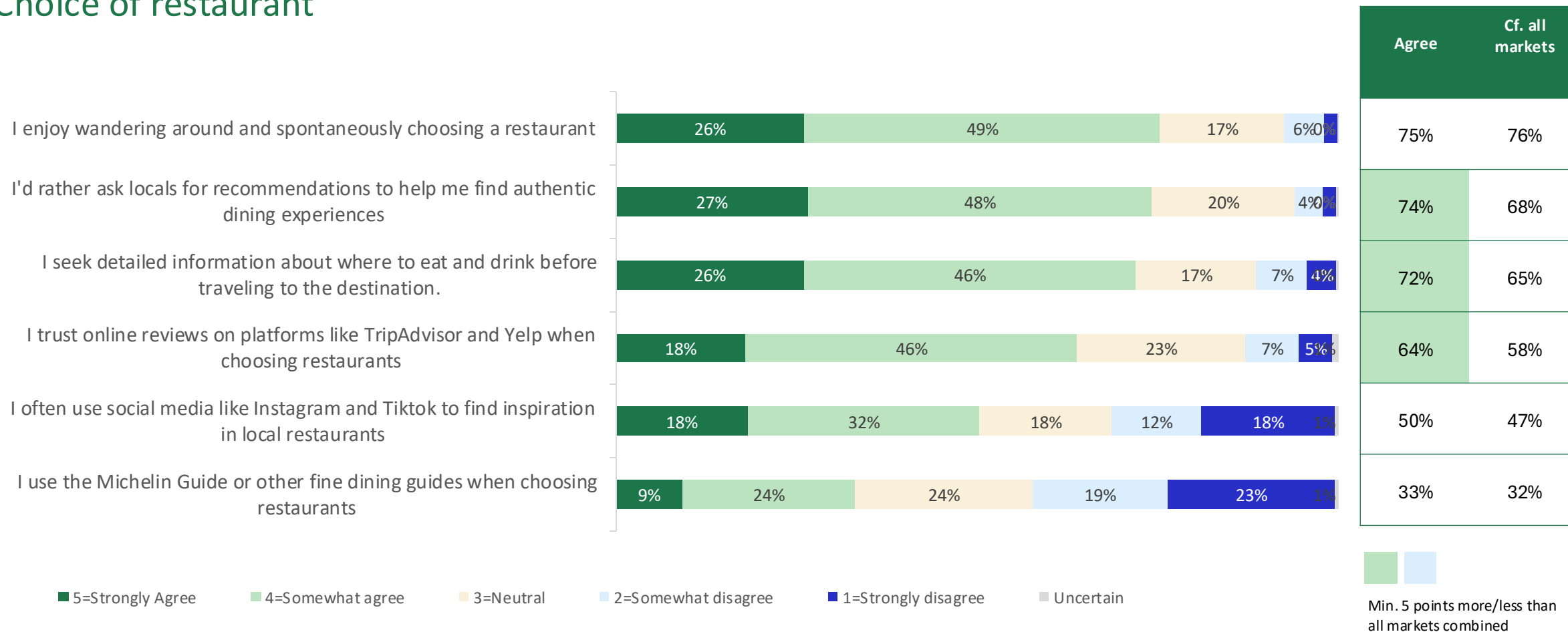
Compared to other markets, Spaniards prefer more premium dining options, and are less interested in cafes or choosing a restaurant based on mood.

Tourist Type 2/2



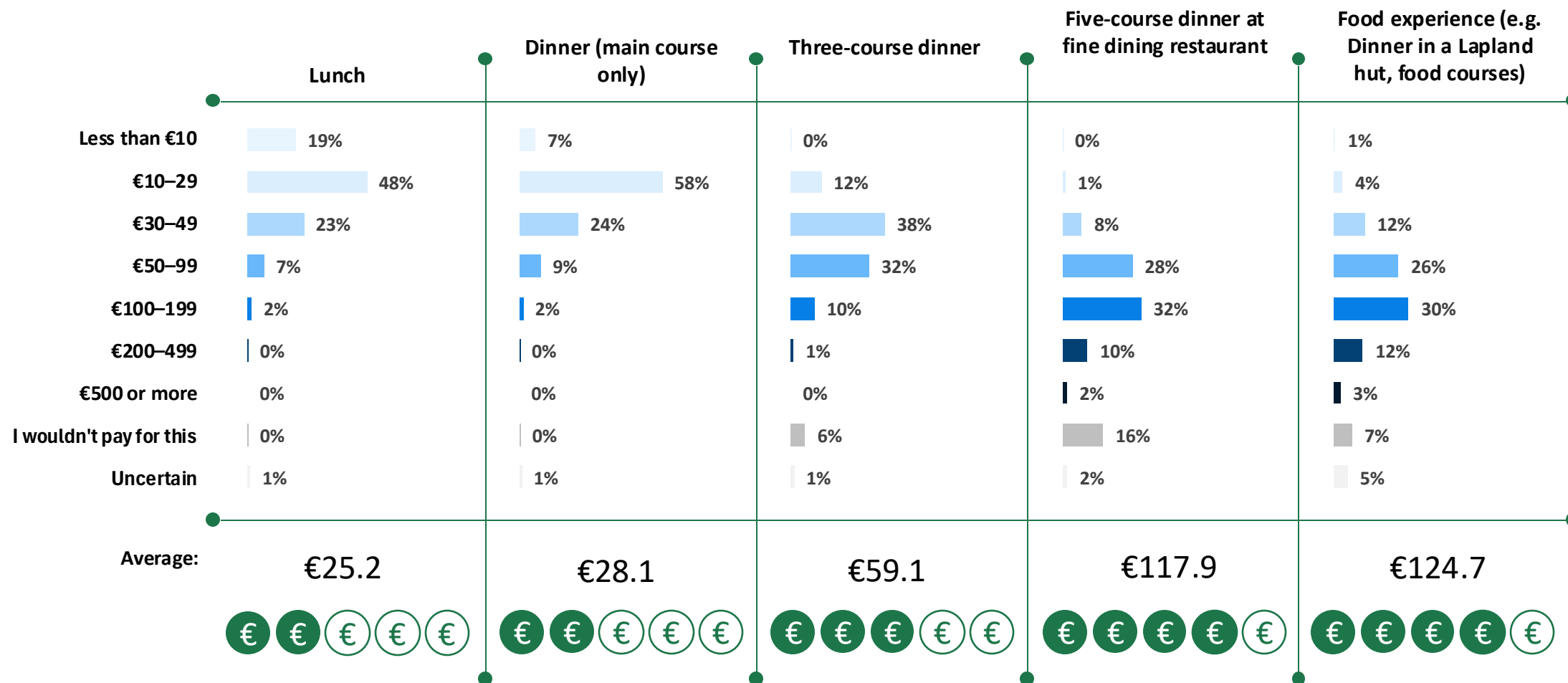
Spaniards rely on recommendations and online reviews from locals more than other markets when looking for a restaurant

Choice of restaurant



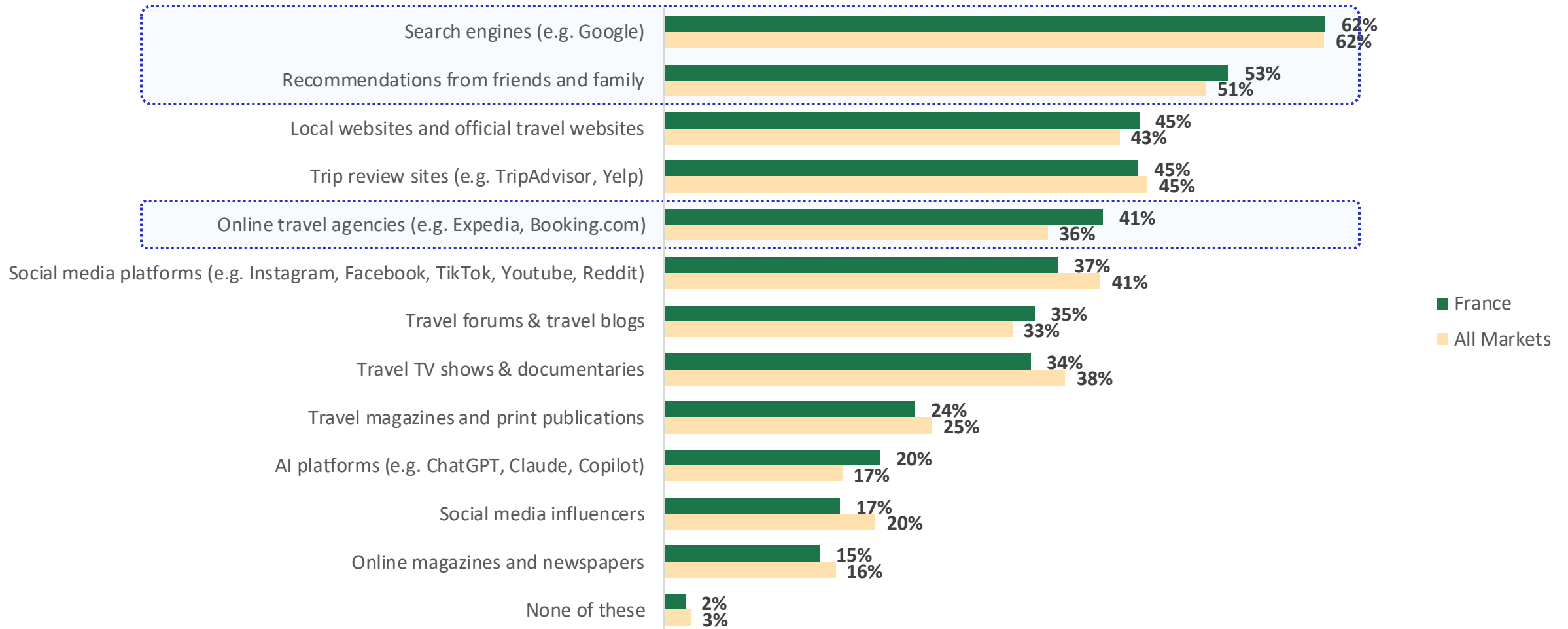
Spaniards are more willing to pay more for food experiences than for fine dining

Willingness to pay



The most important sources of information about destinations are search engines and recommendations from friends and family. The use of online travel agencies is slightly above average in Spain.

Sources of information



Awareness and attractiveness of destinations

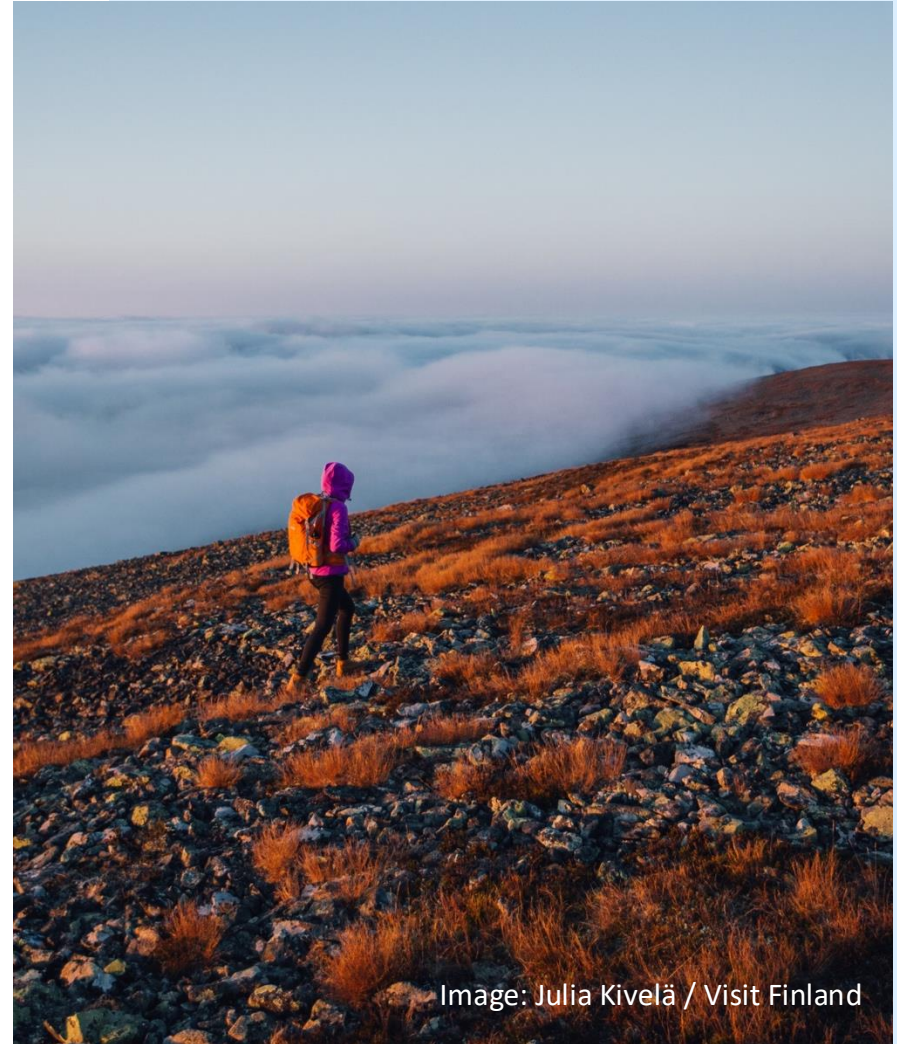
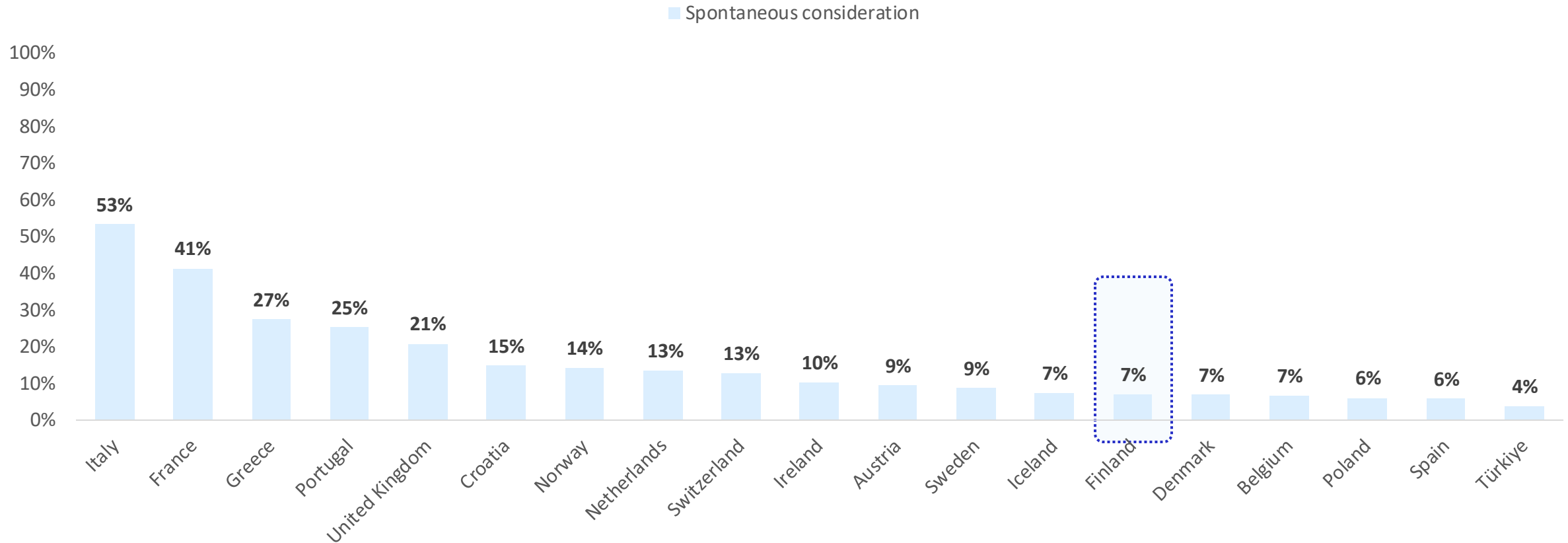


Image: Julia Kivelä / Visit Finland

Italy and France are the destinations in Europe that people most spontaneously choose to travel. Norway is mentioned most often among the Nordic countries, Finland is on the same level as Denmark.

Spontaneous consideration

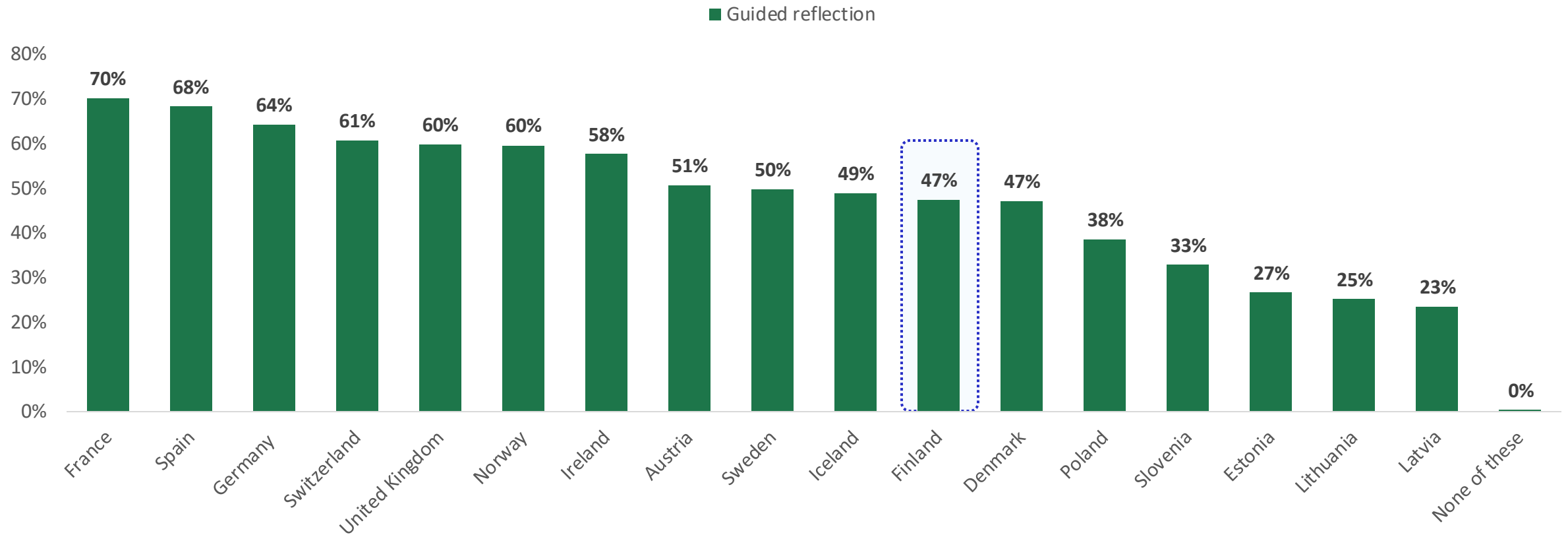


Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? (Open)

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1009 IP

The most considered destination for Spaniards among the listed countries is their neighbour, France. Norway is the most considered of the Nordic countries, Finland, Sweden and Denmark are on the same level.

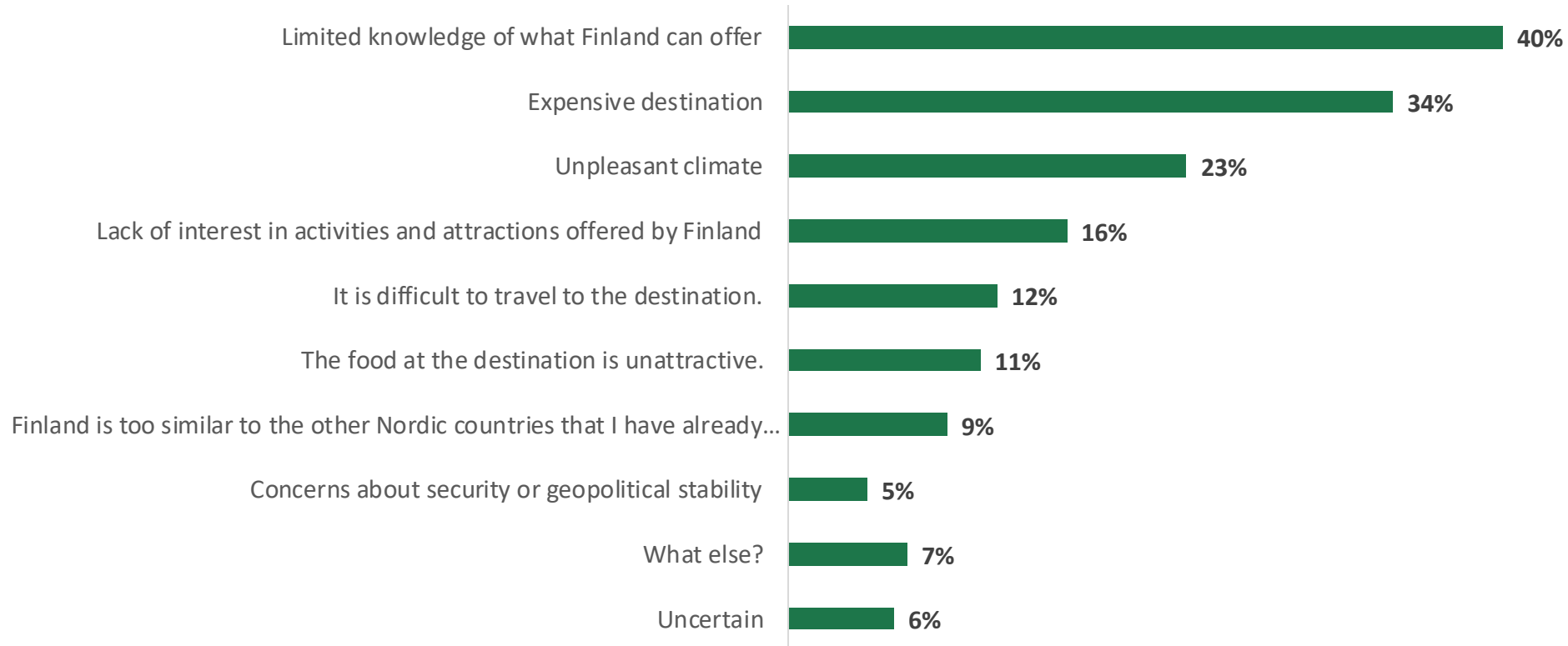
Guided reflection



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 1009 IP

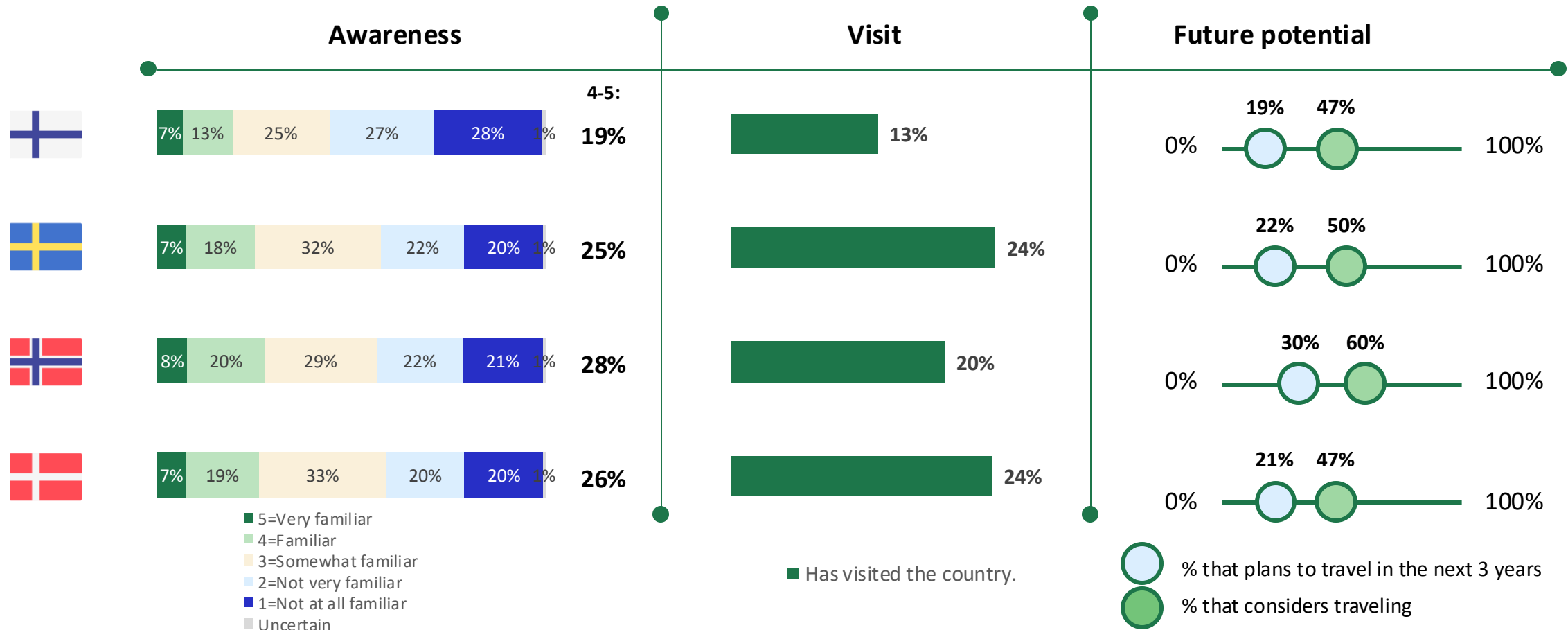
Limited knowledge and high prices in the destination are the biggest obstacles for Spaniards to travel to Finland

Obstacles of travelling to Finland



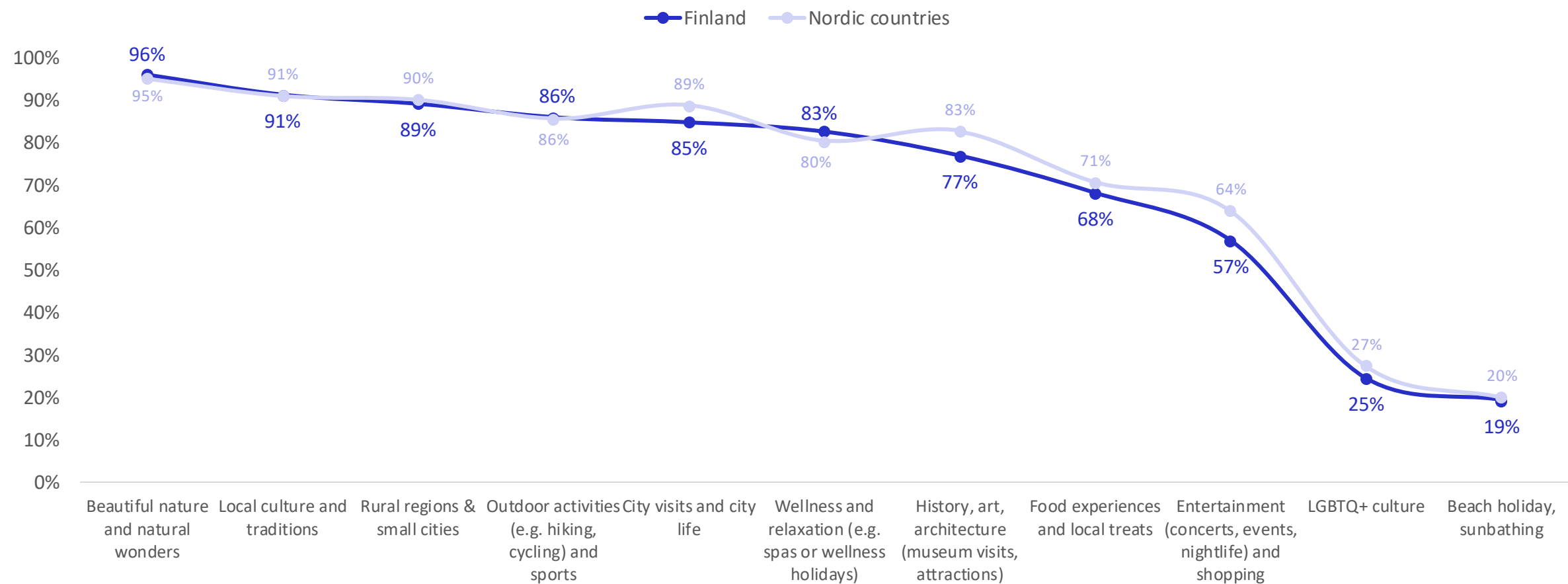
Sweden and Denmark are the most visited countries, but Norway attracts the most Spaniards. About one in five plans to travel to Finland in the near future.

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



Beautiful nature, local culture, countryside and outdoor activities are equally strongly connected to all Nordic countries

Linking travel themes to Finland and the Nordic countries



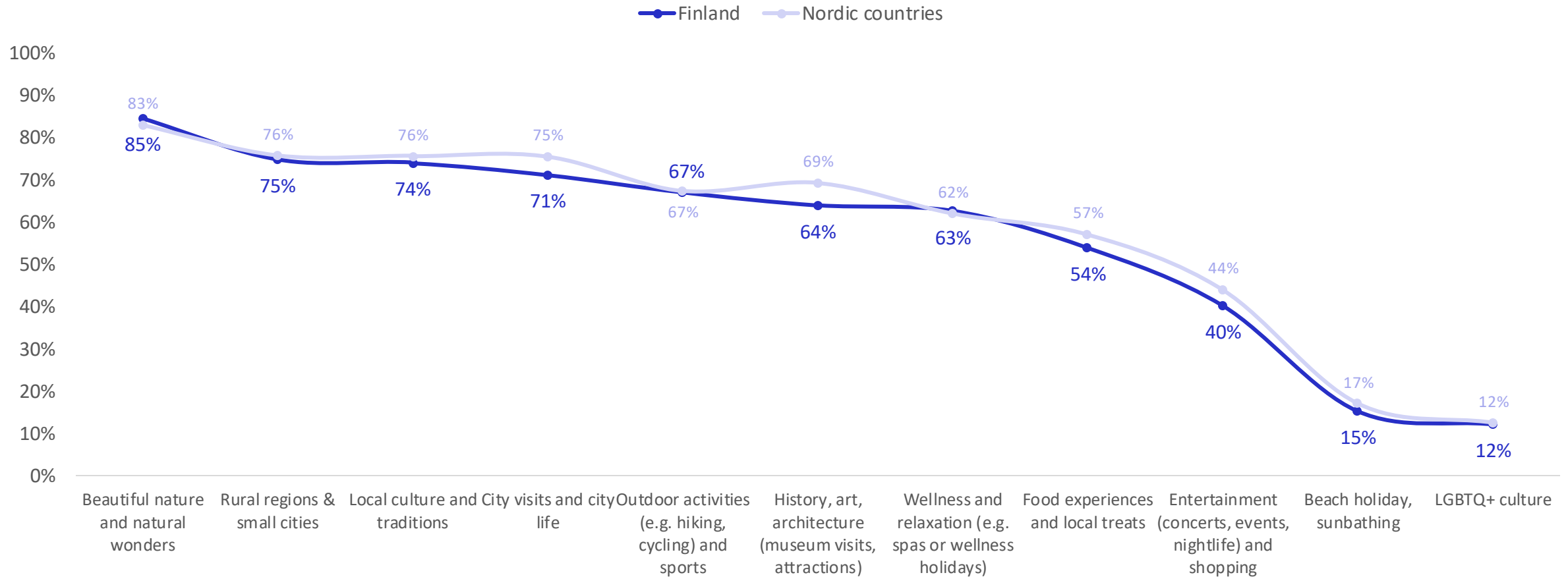
Finland is less often associated with urban life, history and entertainment than other Nordic countries.

Linking travel themes to Finland and the Nordic countries

					Average
Beautiful nature and natural wonders	96%	95%	98%	92%	92%
Local culture and traditions	91%	91%	92%	90%	90%
Rural regions & small cities	89%	89%	93%	90%	90%
Outdoor activities (e.g. hiking, cycling) and sports	86%	84%	89%	84%	84%
City visits and city life	85%	88%	90%	92%	92%
Wellness and relaxation (e.g. spas or wellness holidays)	83%	80%	81%	78%	78%
History, art, architecture (museum visits, attractions)	77%	83%	85%	86%	86%
Food experiences and local treats	68%	69%	71%	75%	75%
Entertainment (concerts, events, nightlife) and shopping	57%	65%	61%	73%	73%
LGBTQ+ culture	25%	30%	25%	30%	30%
Beach holiday, sunbathing	19%	18%	22%	21%	21%

The Nordic countries are the top choice for nature holidays. Finland is considered slightly less than other Nordic countries as an urban and historical destination.

Attractiveness of the Nordic countries by travel theme



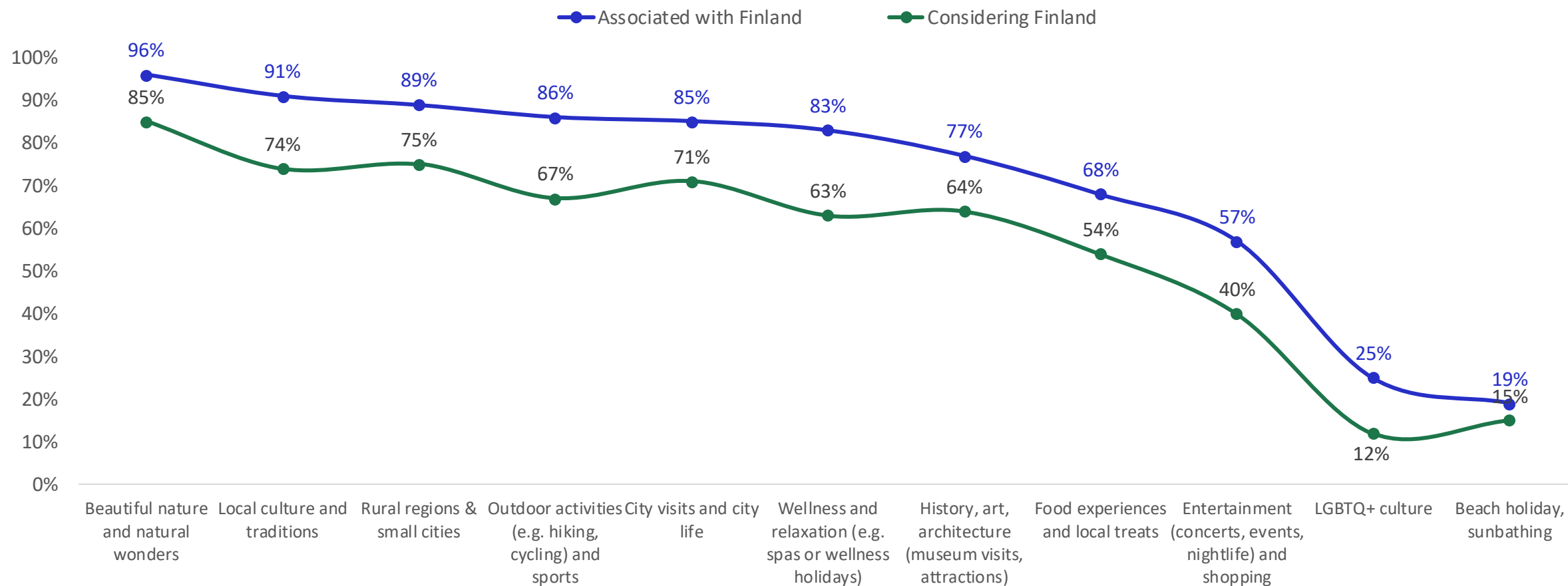
Denmark's attractiveness differs most from other Nordic countries – in Denmark, city life and food experiences are particularly emphasized.

Attractiveness of the Nordic countries by travel theme

					Average
Beautiful nature and natural wonders	85%	84%	86%	77%	83%
Rural regions & small cities	75%	73%	79%	76%	76%
Local culture and traditions	74%	77%	76%	76%	76%
City visits and city life	71%	75%	74%	81%	75%
Outdoor activities (e.g. hiking, cycling) and sports	67%	68%	70%	64%	67%
History, art, architecture (museum visits, attractions)	64%	70%	71%	73%	70%
Wellness and relaxation (e.g. spas or wellness holidays)	63%	63%	65%	57%	62%
Food experiences and local treats	54%	56%	56%	63%	57%
Entertainment (concerts, events, nightlife) and shopping	40%	44%	42%	51%	44%
Beach holiday, sunbathing	15%	17%	17%	18%	17%
LGBTQ+ culture	12%	15%	11%	11%	12%

The nature theme is strongly linked to Finland, and Finland is also being considered as a destination for nature tours.

Merging and attracting travel themes, Finland



Country image: Nordic countries

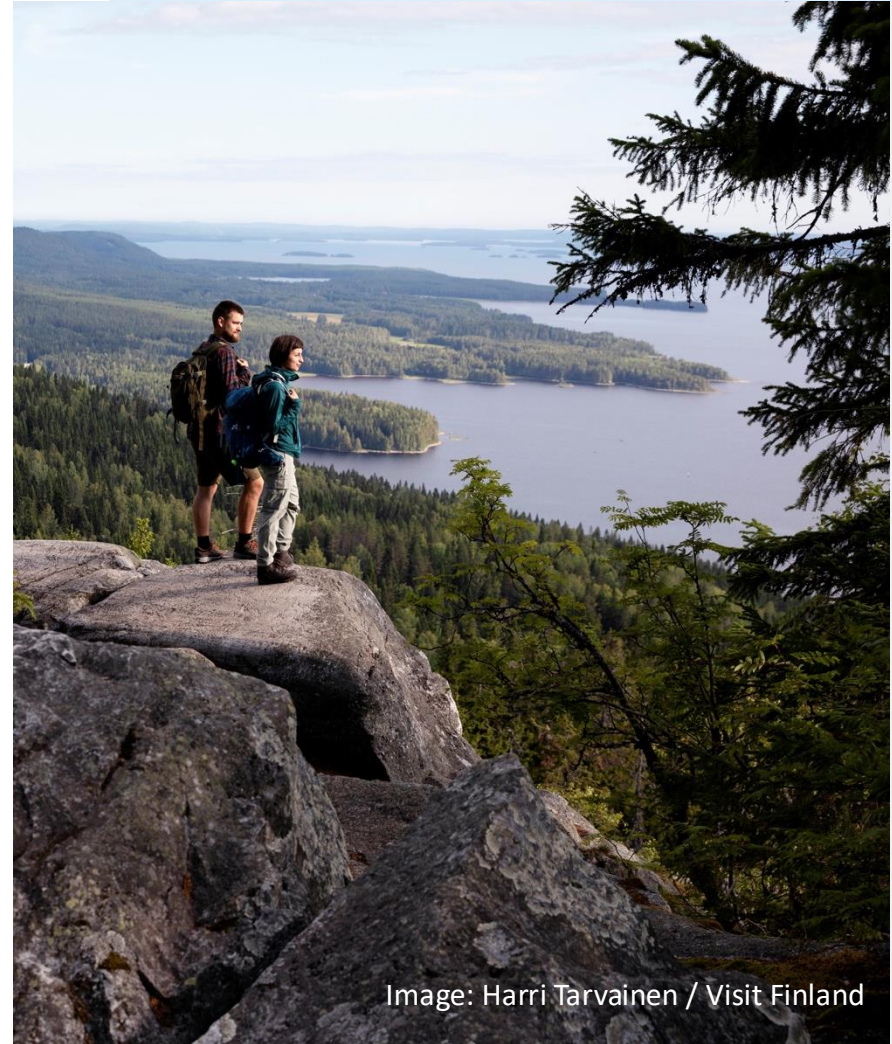
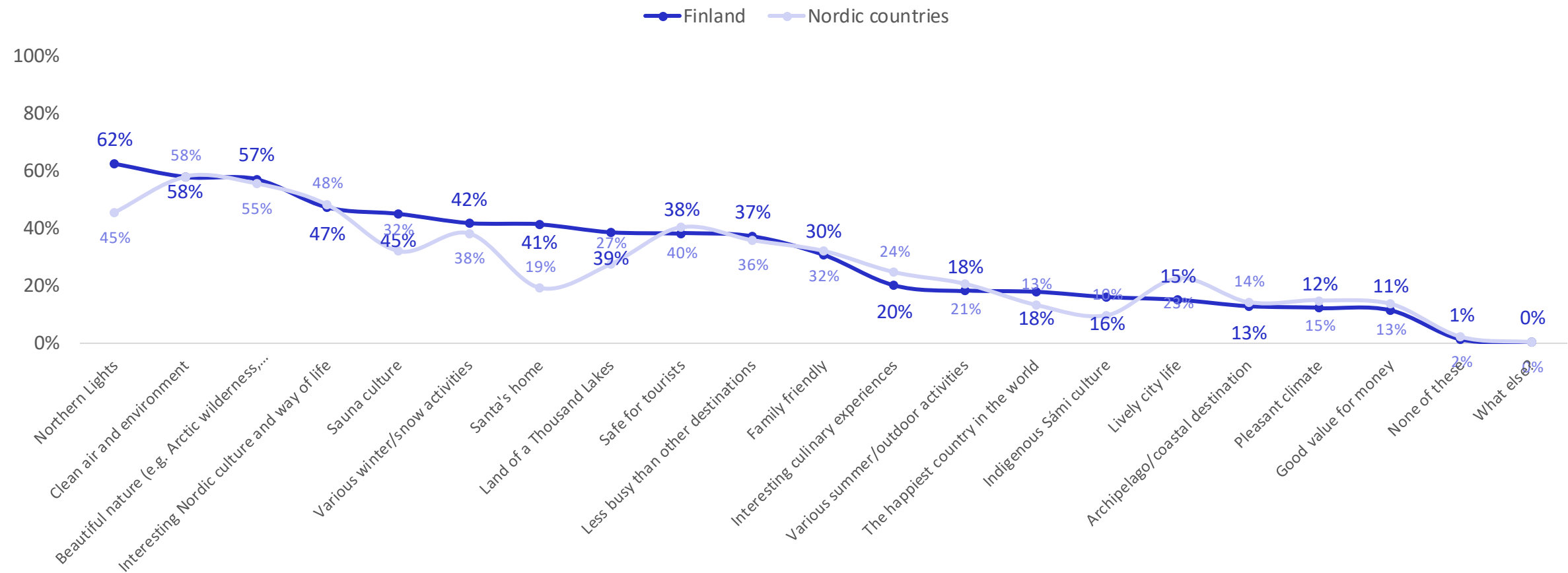


Image: Harri Tarvainen / Visit Finland

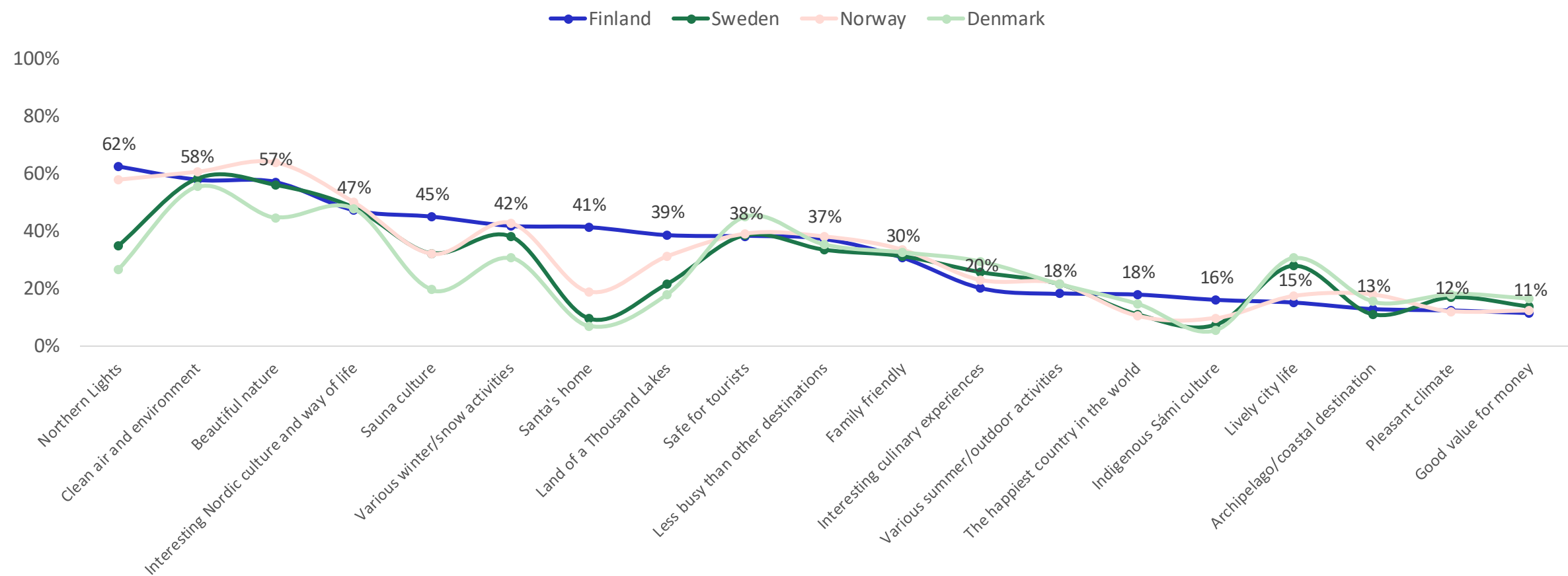
According to Spaniards, Finland is most strongly characterized by the northern lights, clean air and the environment, as well as beautiful nature. The sauna culture, Santa's home and the land of a thousand lakes set Finland apart from the other Nordic countries.

Country image, Finland vs. Nordic countries



Norway is also strongly associated with the Northern Lights, and the other Nordic countries are equally known for clean air and beautiful nature.

Country image



The most important driver to consider Finland is the beautiful nature.

The most important impressions for consideration

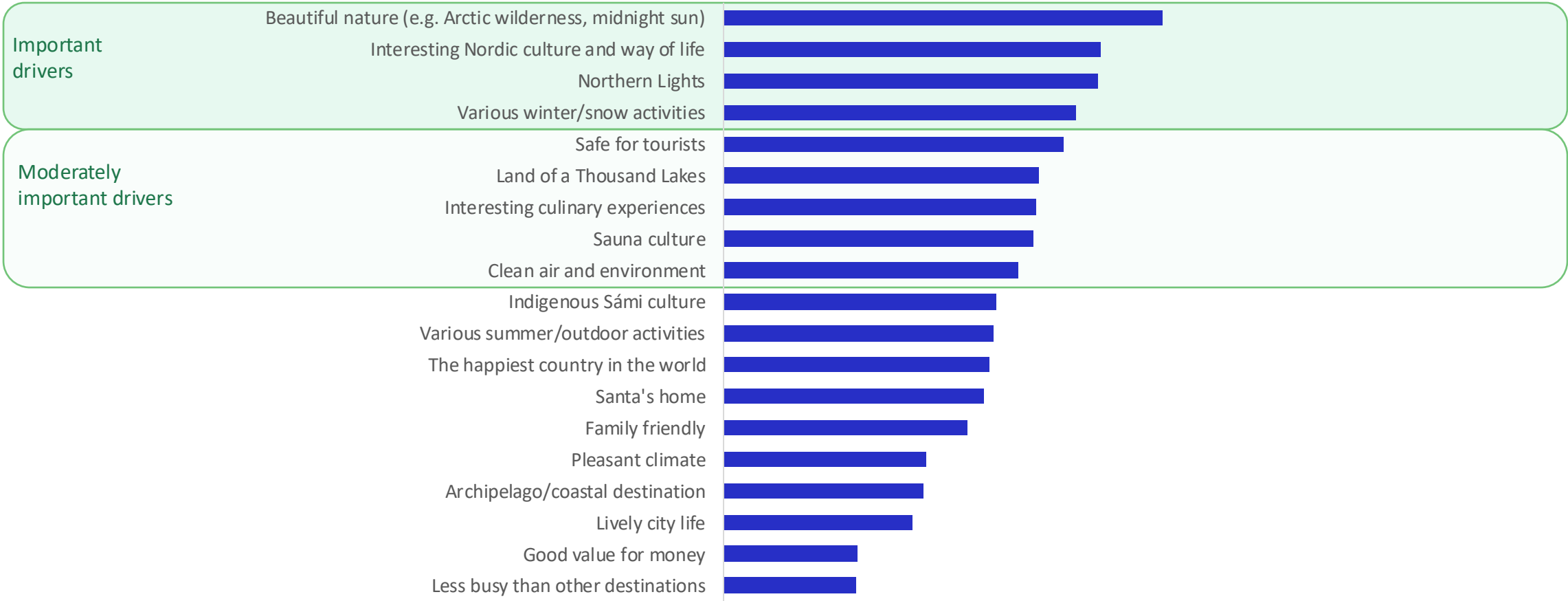


Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- 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?

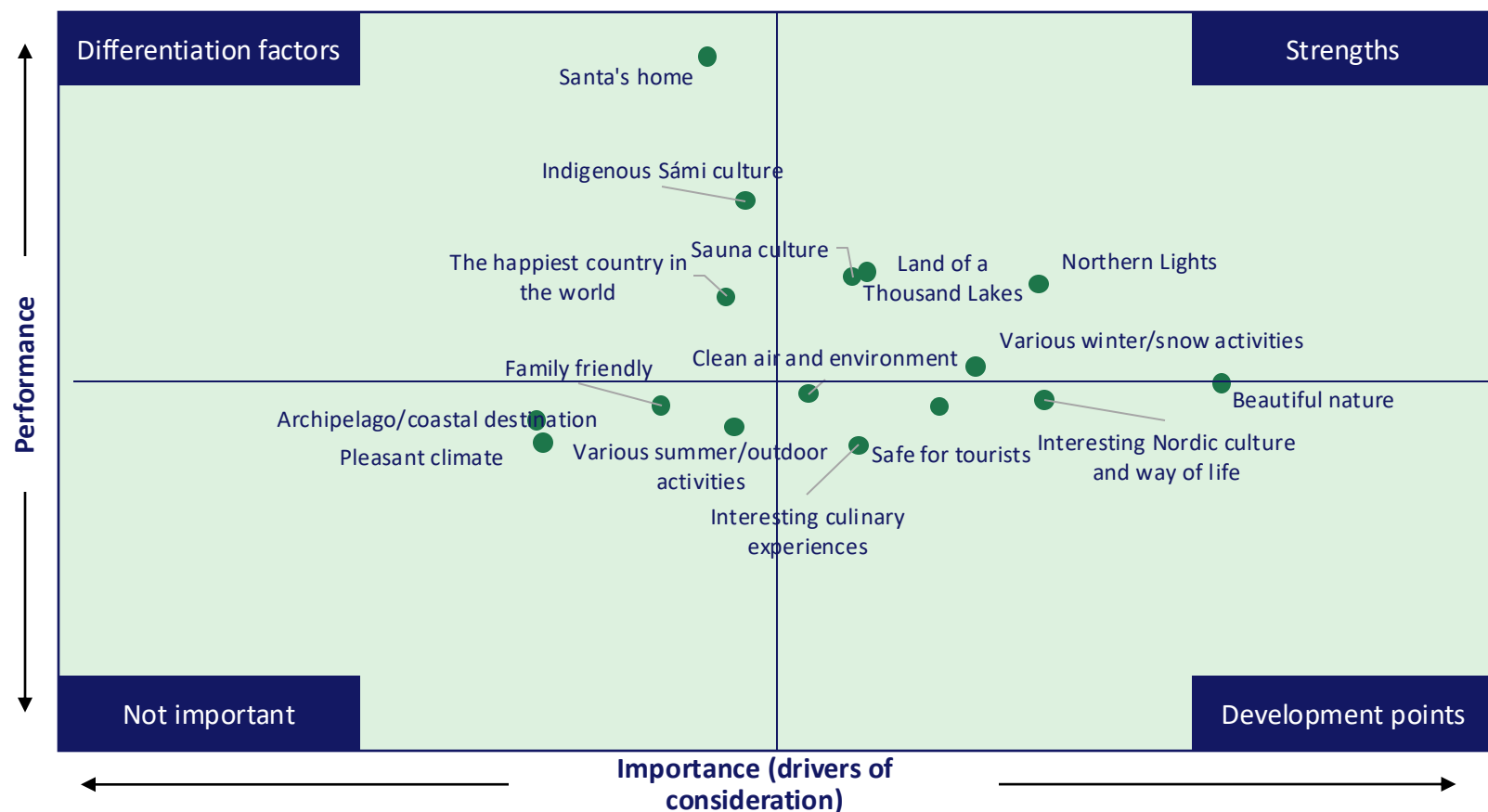
The most important drivers to consider Finland are the beautiful nature, interesting Nordic culture, northern lights and winter activities

Drivers of consideration



The Northern Lights, winter activities, lakes and sauna culture are Finland's strengths in relation to the other Nordic countries.

Importance vs. Performance: Country image



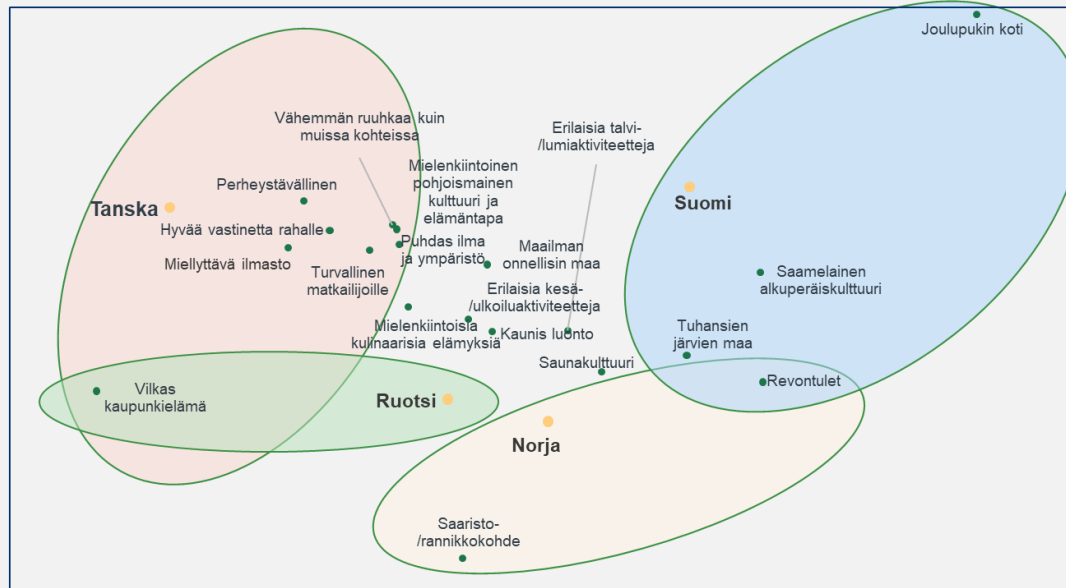
Comments

— Northern Lights, winter activities, lakes and sauna culture are important factors for Finland and also represent Finland's **current strengths** compared to the other Nordic countries.

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

Finland's **development targets** in the important drivers include *interesting culinary experiences*

HOW TO READ THE MIND MAP



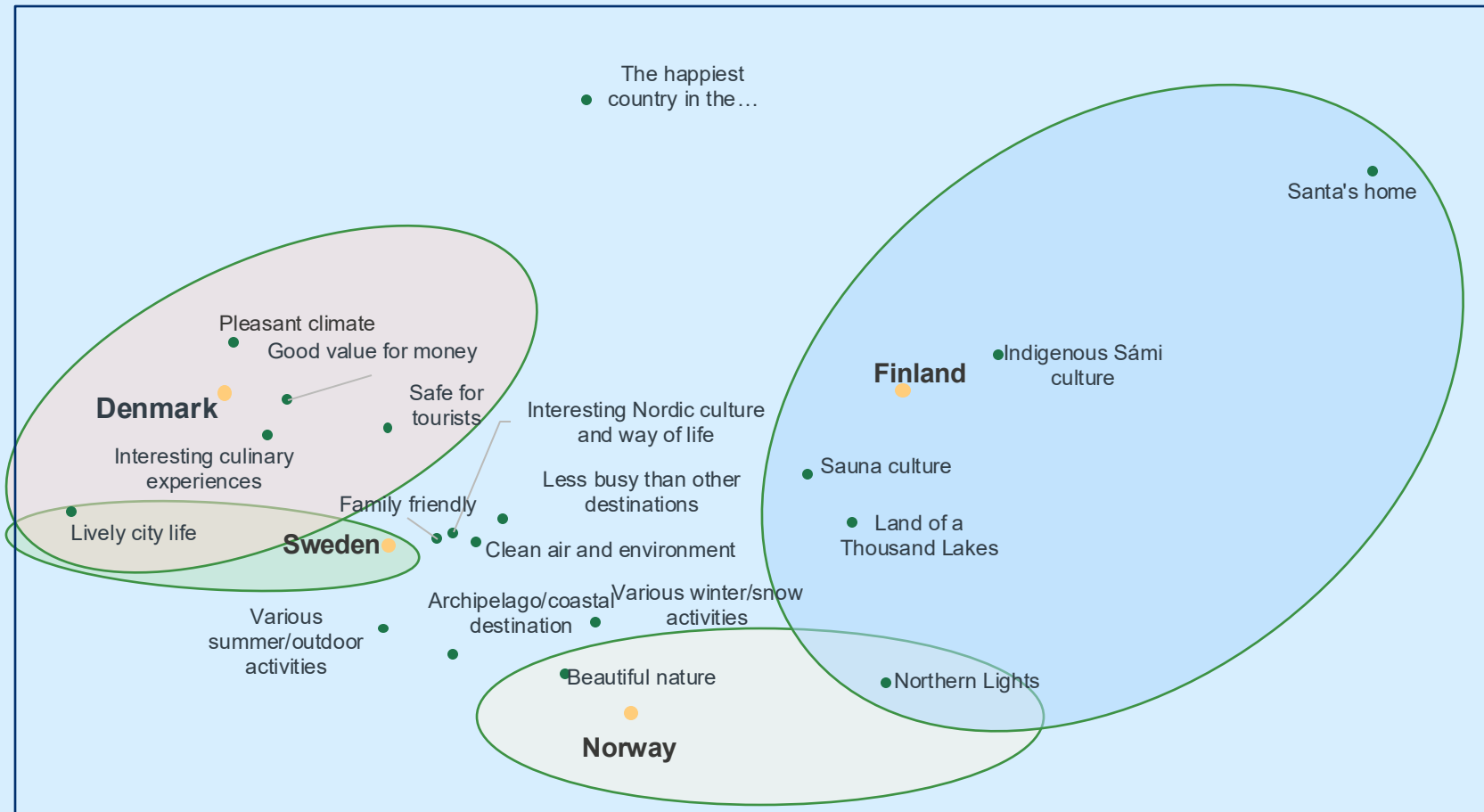
The positioning map visualises how tourists experience different countries and the images associated with them.

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 has a unique image in the minds of Spaniards, highlighting Santa's home, the northern lights, lakes and sauna culture.

Country image, relative image



Comments

Finland stands out slightly from the image of the other Nordic countries. In particular, Santa's home, the northern lights, the sauna culture and the land of a thousand lakes describe Finland relatively more than the other Nordic countries.

Northern Lights are also relatively strongly associated with Norway, and the country is also characterized by beautiful nature.

Denmark has a clearer focus on being a safe destination for an urban holiday that offers culinary experiences.

Sweden is positioned between Denmark's urban image and Norway's beautiful nature image, but doesn't have a clear profile image.

The image and attractiveness of Finnish food



Image: Soili Jussila / Vastavalo / Visit Finland

Finnish food is often associated with fish, naturalness, healthiness and simplicity.

Spontaneous impression of Finnish cuisine

- **Fish and seafood** are the strongest image of Finnish food for the Spanish, often combined with smoked and salted foods.
- The food is seen as **natural, fresh, healthy and simple**, highlighting local and seasonal ingredients.
- **Game and meat** are also important, and food is thought to be **rich and hearty** due to the cold climate.
- Flavours are often considered “**strong**” or “**powerful**”, but also “**simple**” and “**less spicy**” than in Mediterranean cuisine.
- There are two opinions about variety: some consider the food rich, and others consider it monotonous.
- Finnish cuisine is perceived as **different and exotic**, but also **less attractive** than Spanish cuisine.
- **Unfamiliarity** is common, but curiosity and experimentation are as well.

"Natural food with smoked salmon and herring"

"Based on local fish and hot dishes"

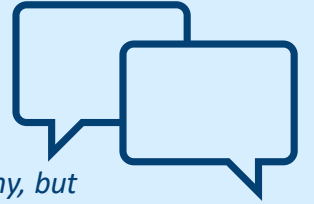
"It doesn't look good to me. I think it's fresh and healthy, but a bit flavourless"

"Similar to Sweden: herring, salmon, berries, potatoes and meat."

"It's simple but natural and based on natural, high-quality ingredients"

"I think it's based on hunting and fishing, with light seasoning. Lots of hot food due to the weather."

"I don't know, but I'm imagining healthy fats and lots of vegetables and meat"



The level of familiarity and attractiveness of Finnish food are the biggest obstacles to not seeing Finland as a food destination

Reasons why Finland is not seen as a food destination



Spaniards most often try fish and reindeer

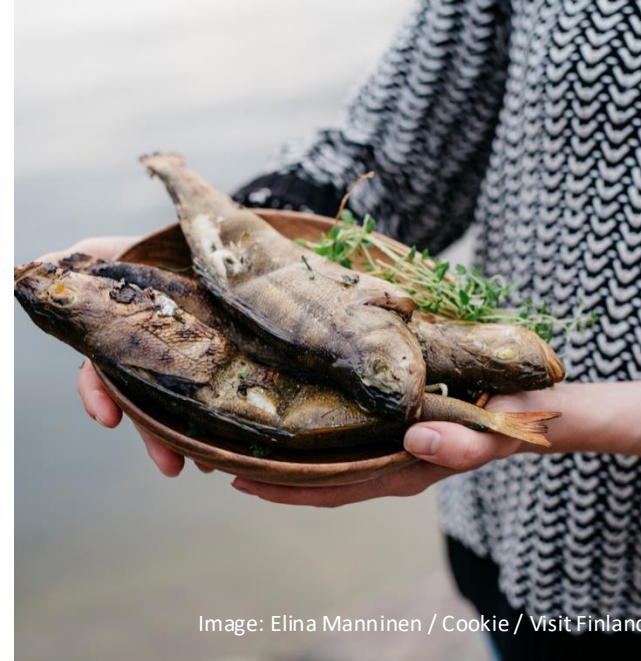


Image: Elina Manninen / Cookie / Visit Finland

Pastries and delicacies

Karelian pie, cinnamon roll, bun, chocolate, biscuits, salty liquorice



Image: Harri Tarvainen / Visit Finland

Salmon and fish based foods

Smoked, grilled, salmon soup, cheese, kalakukko, herring

Reindeer meat and other game

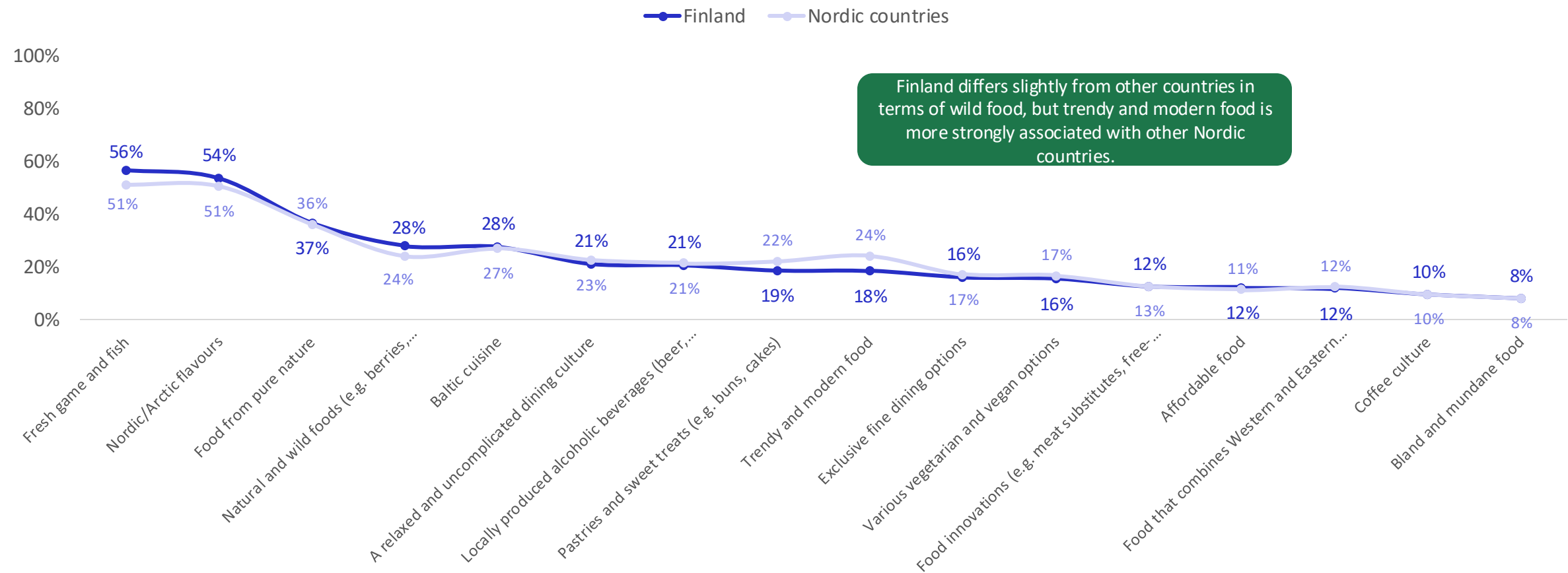
Reindeer, moose, bear, deer

Other mentions

Pea soup, bread cheese, berries (with game and desserts)

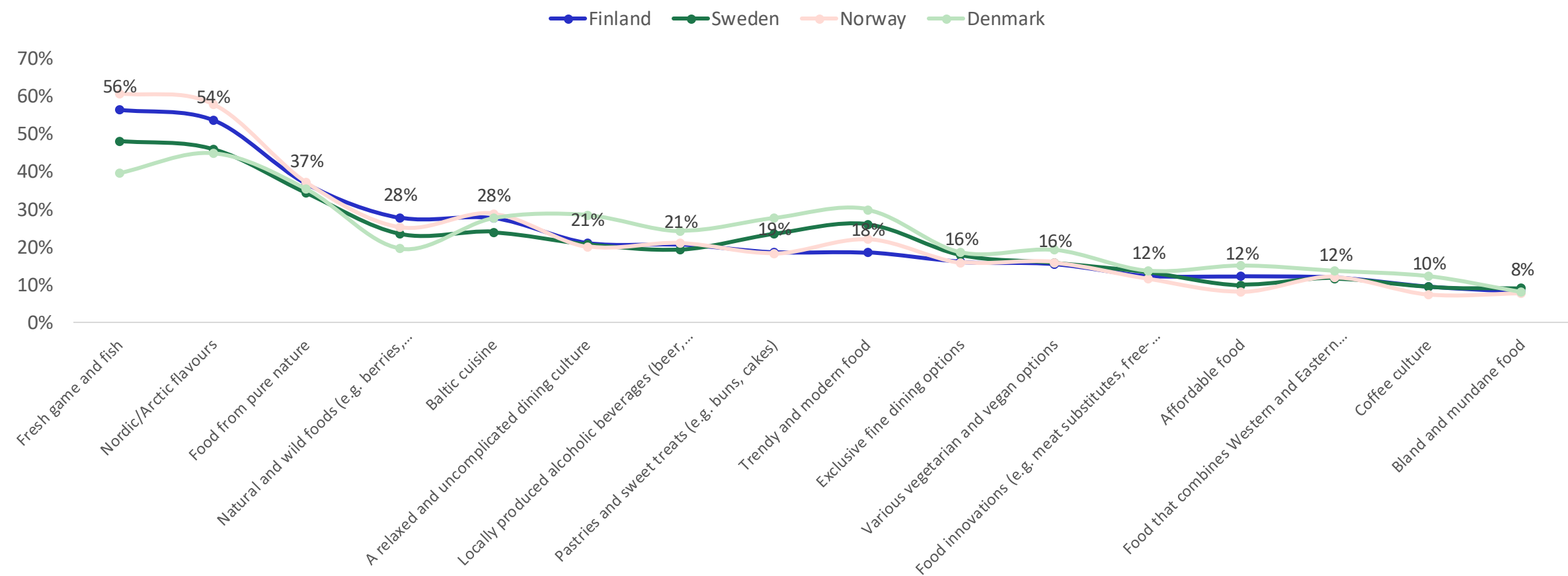
The food image associated with Finland and the Nordic countries consists most strongly of fresh fish, game, and Nordic flavours.

Food image



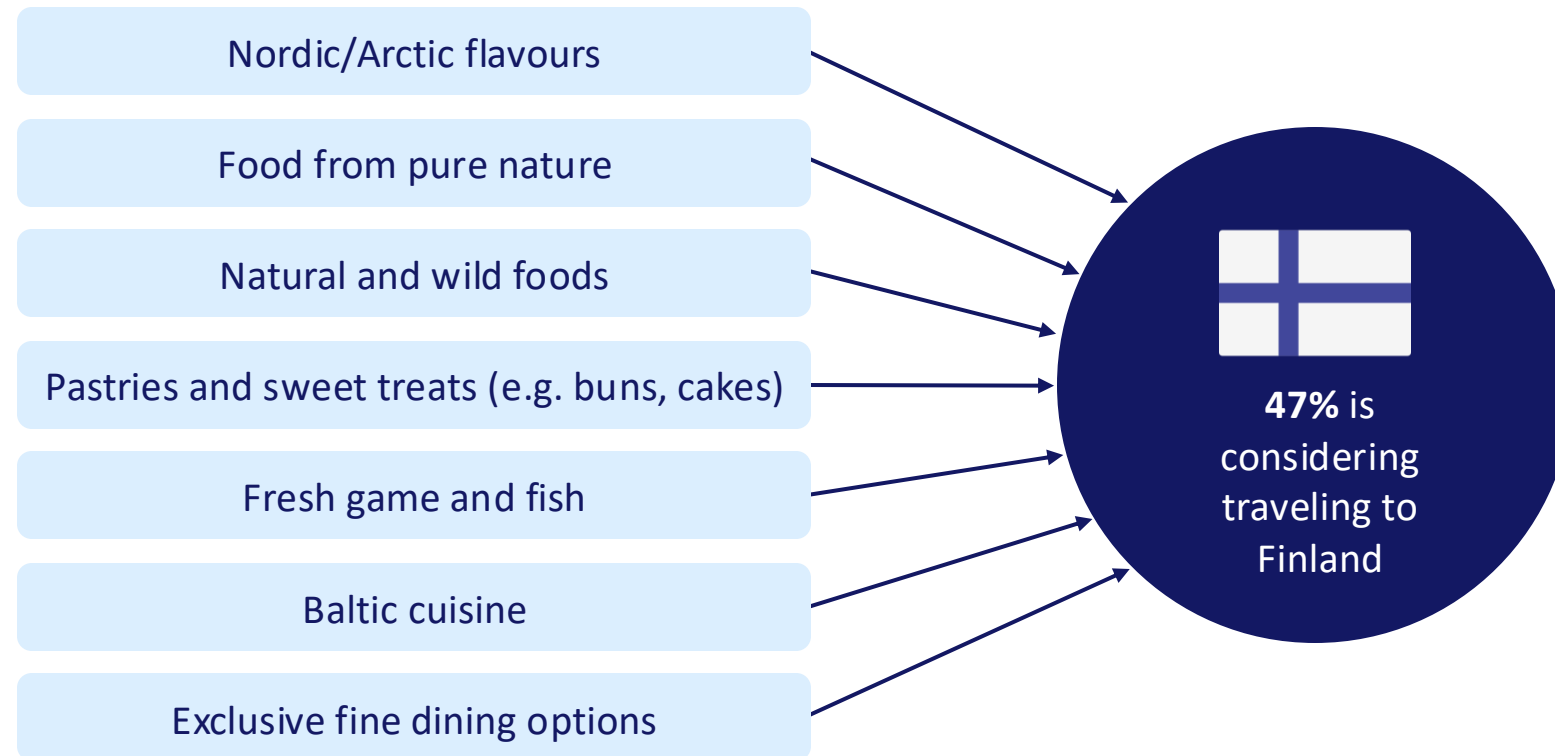
Denmark stands out from the other Nordic countries with its relaxed food culture. Sweden and Denmark are associated with pastries more than Finland and Norway.

Food image



The most important drivers to consider Finland are Nordic flavours, food from pure nature, and natural food.

The most important attributes that drive consideration

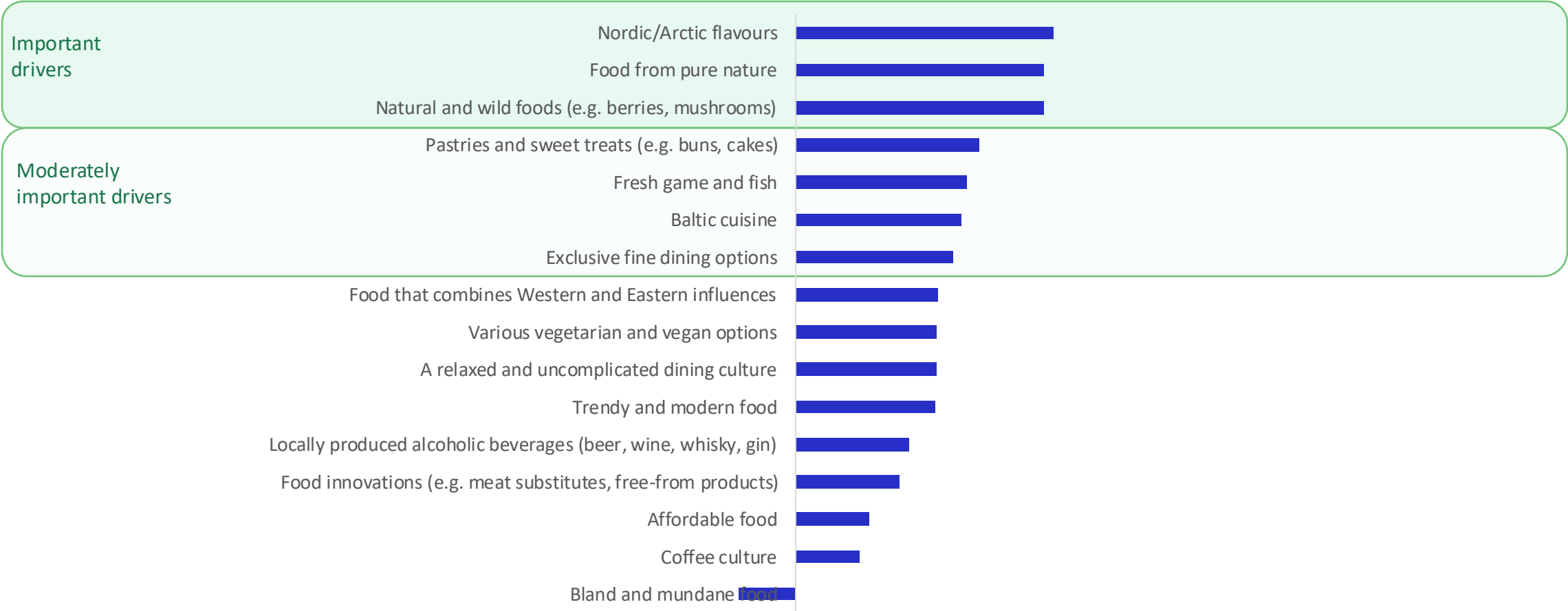


Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

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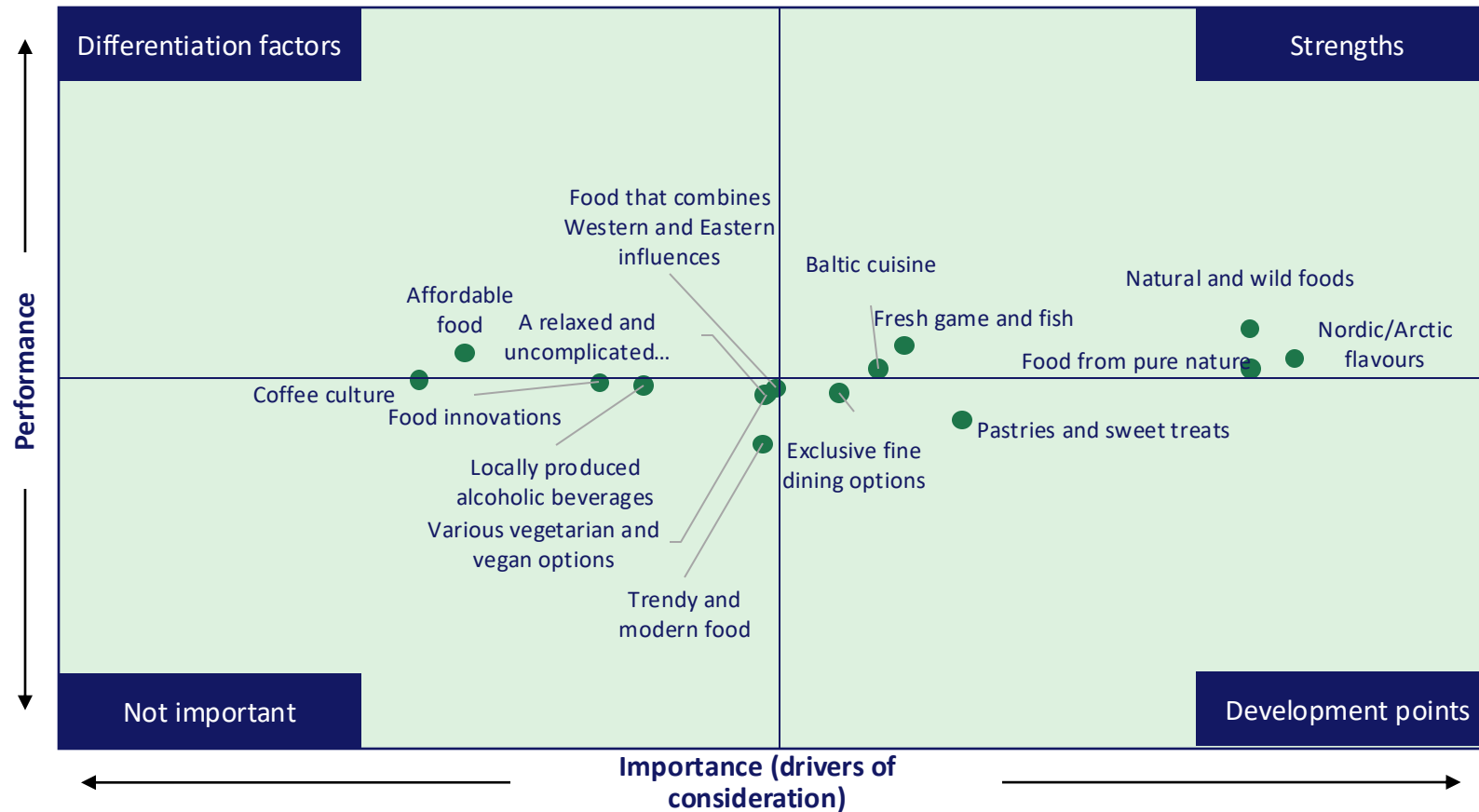
In addition to the main drivers, plural, fresh game/fish, Baltic cuisine and fine dining options are also relevant.

Drivers of consideration



Finland performs similarly to the other Nordic countries in the key drivers, with its strengths being wild food, as well as fresh game and fish.

Importance vs Performance: Food image



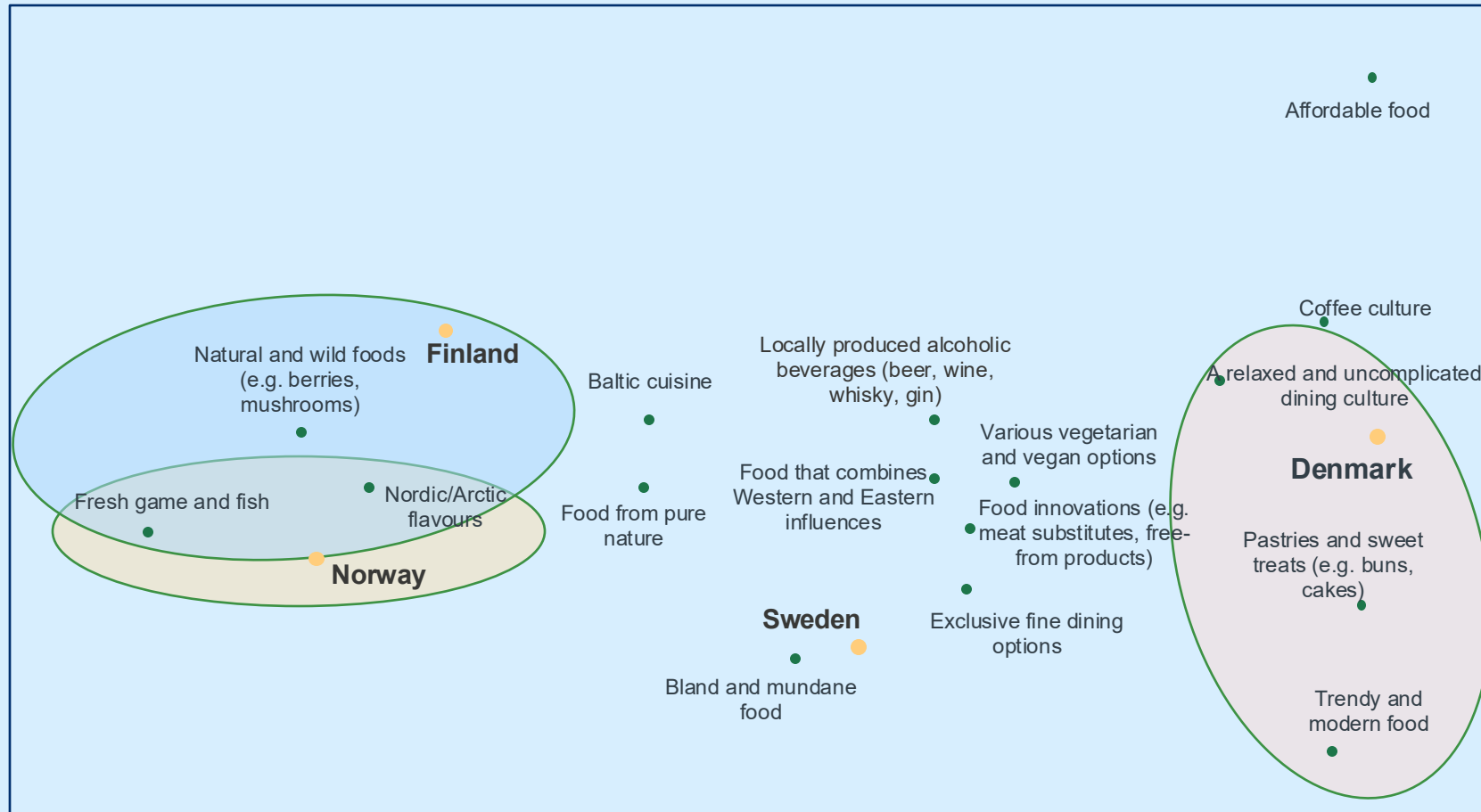
Comments

Finland performs in the most important drivers at almost the same level as the other Nordic countries. *Natural and wild foods* and *fresh game and fish* are images in which Finland performs slightly stronger than others.

Finland's **development targets** in the important drivers include *pastries and sweet treats*.

The food image of Finland is very similar to that of Norway, where both combine images of nature.

Food image, relative image



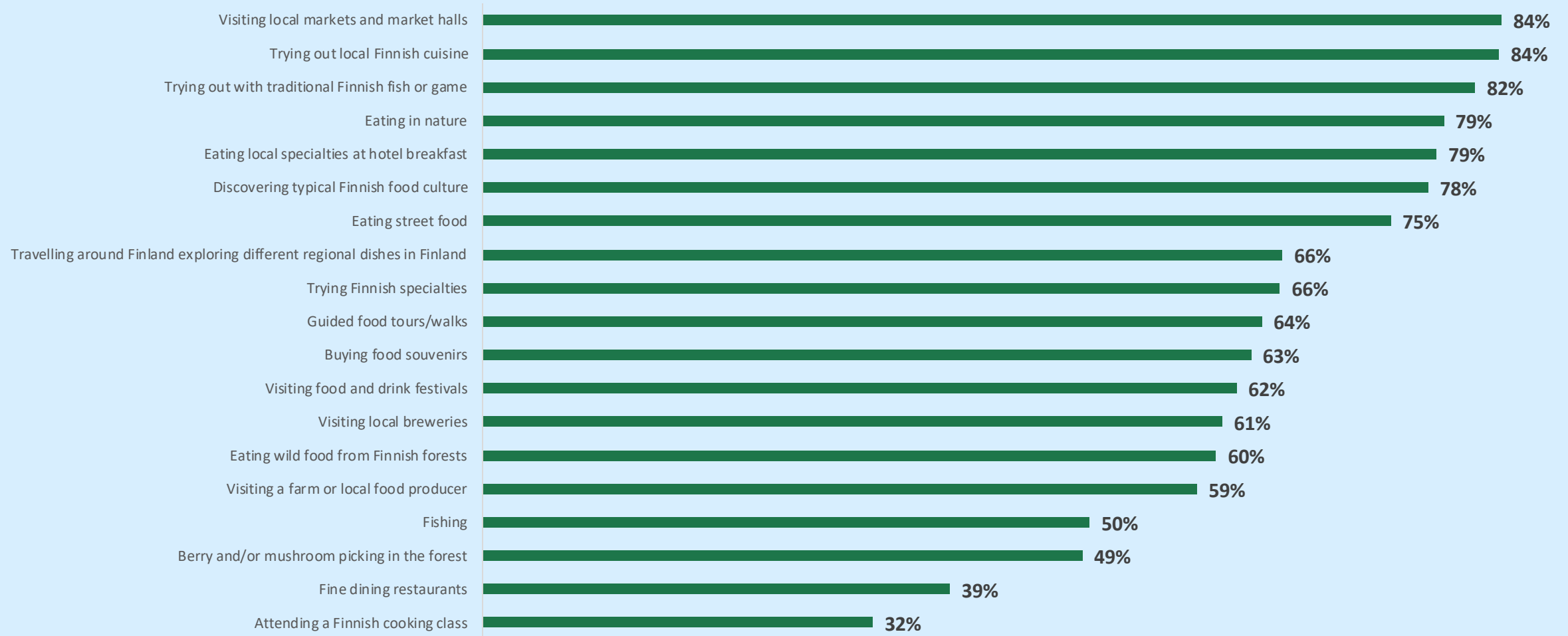
Comments

Two dimensions stand out in the Nordic food image:

- Nature-related food image, i.e. fresh game and fish, wild foods and Nordic flavours. Finland and Norway are strong in this dimension.
- Trendy, casual food culture and pastries. This is more Denmark's profile.

Sweden is not clearly distinguished from the other Nordic countries.

Spaniards are most interested in local markets, local food and traditional fish or game



Eating together, shopping at the market, and nature-themed food shots appeal to Spaniards the most, meal photos the least.



1. 49%



2. 39%



3. 33%



4. 32%



5. 26%



6. 22%



7. 20%



8. 15%



9. 10%

What influenced the selection of your favourite photos?

The Spaniards chose their favourite images because of the delicious, fresh and beautifully presented food in a close-to-nature, peaceful and aesthetically pleasing environment. It is characteristic of Spaniards to emphasize the togetherness that is evident in the images. Atmosphere, cheerfulness, relaxation and visual beauty were also key selection criteria. Favourite photos conveyed the peculiarities of Finnish cuisine, the richness of nature and good atmosphere, while offering the opportunity to share the moment with others.

Appendices

Food from clean nature, as well as trendy food, emerge as the most important drivers for choosing Finland as a food destination

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

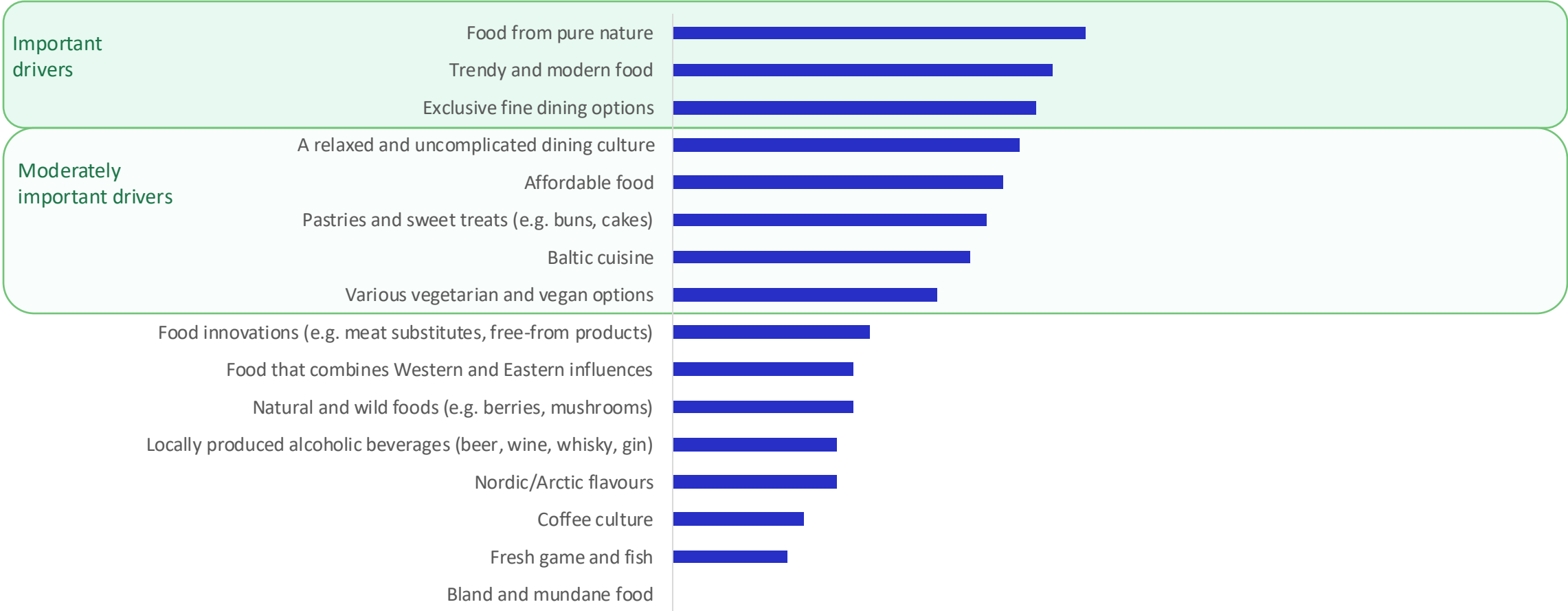


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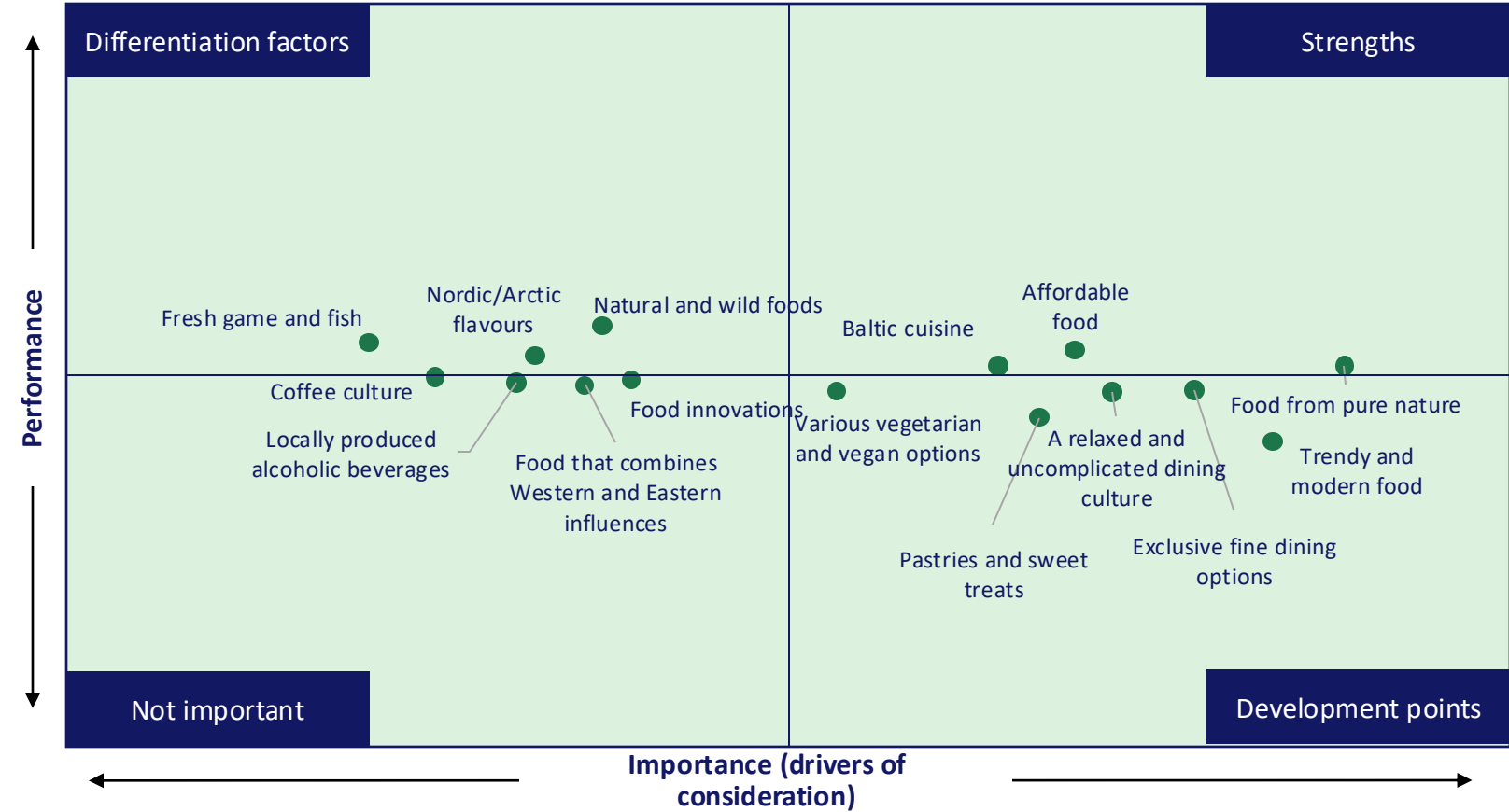
The most important drivers for considering Finland as a food destination are food from clean nature, trendy and modern food, as well as exclusive fine dining options.

Attributes driving Finland's consideration as a food travel destination



Finland performs similarly to the other Nordic countries in the key drivers, with its strengths being food from pure nature and affordability.

Importance vs Performance: Food image



- ### Comments
- Finland performs in the most important drivers at almost the same level as the other Nordic countries.
 - Finland's **development targets** in the key drivers include *trendy and modern food, as well as pastries and sweet treats*.