

What's going on with the German travellers?

Diving into the RA 2024 Report for Visit Finland

2024
Ulf Sonntag, NIT





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

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



Visit Finland



Studiosus



1982

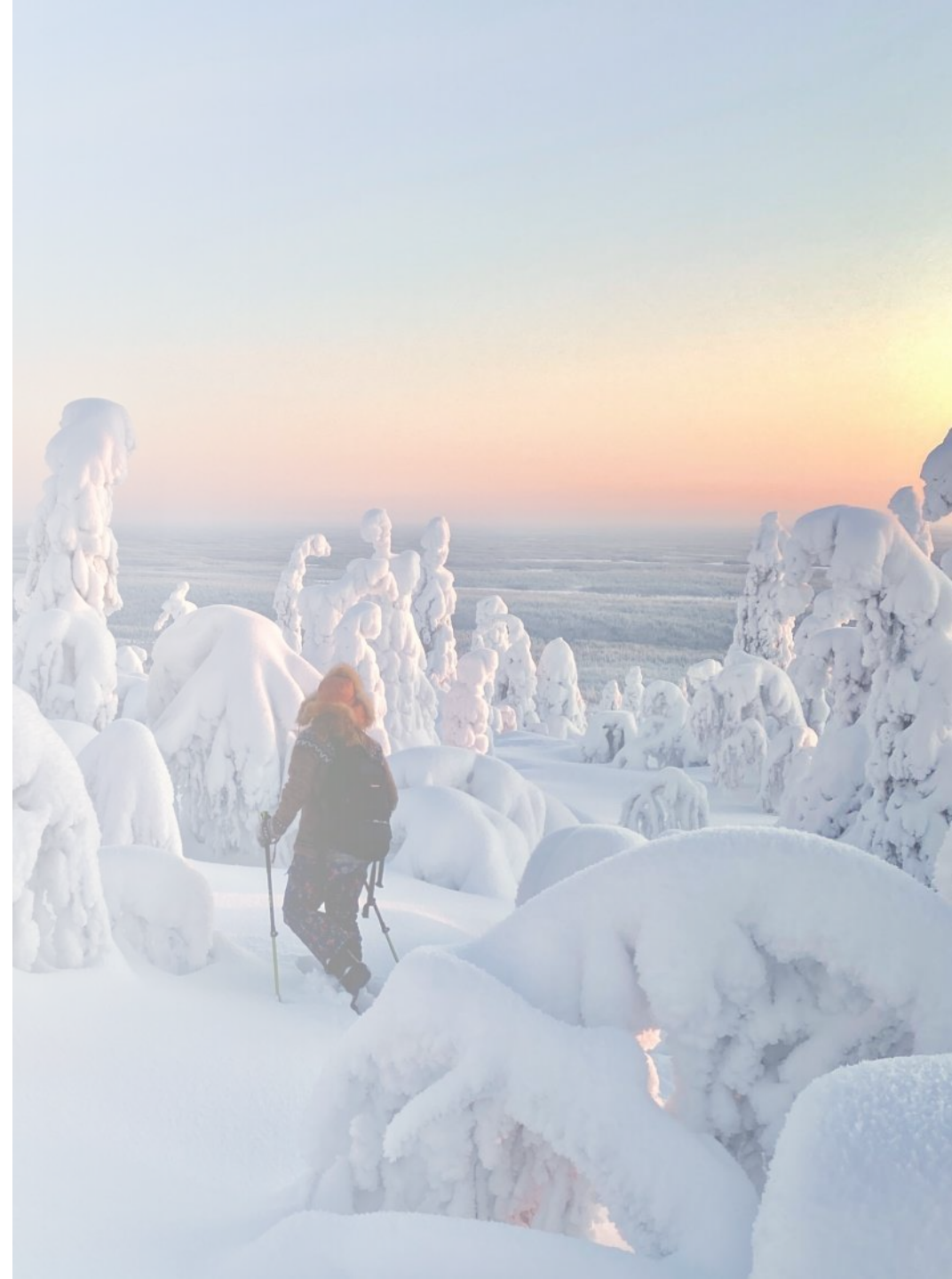


2023



Photos: Ulf Sonntag

You can count on the
German market!



Volume of holiday travel in 2023

Amazing post-COVID recovery



**54.2
million**

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



**64.5
million**

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



**86.3
billion**

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

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

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

How important are the Nordics for the German travellers

Mediterranean 10x bigger than Nordics, both increasing



43% Mediterranean ↗
EU and outside EU

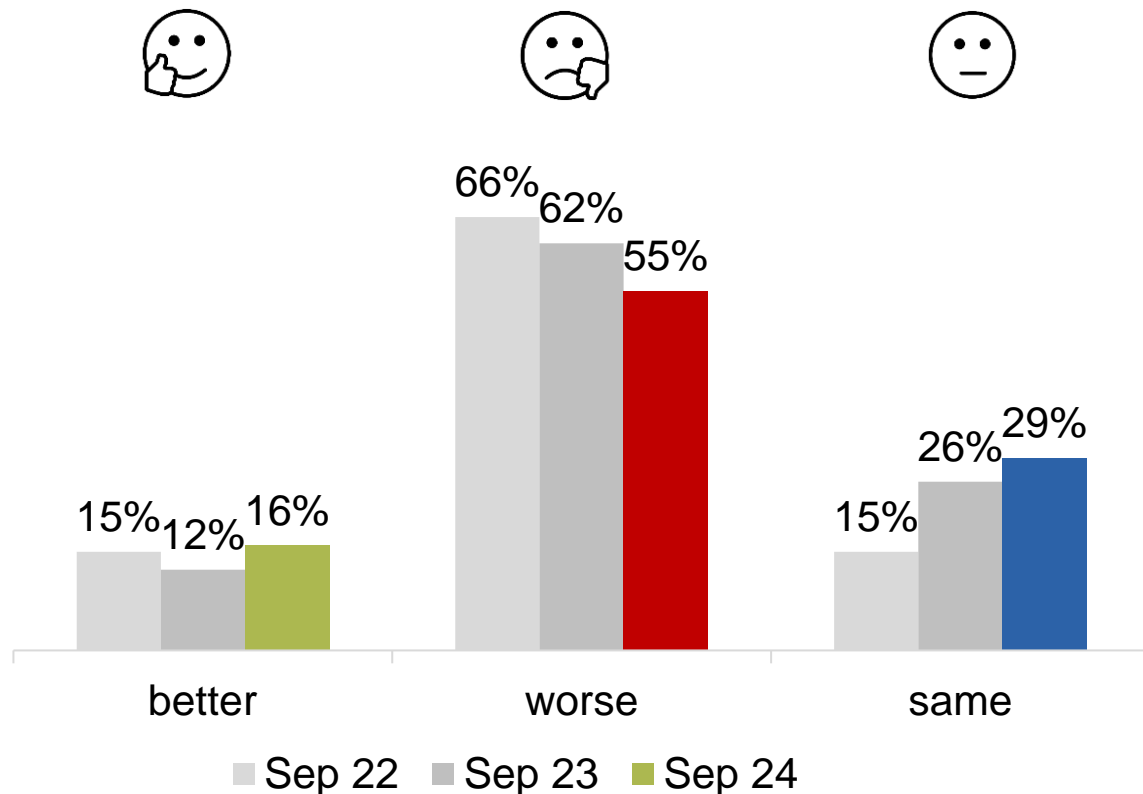
8% Alps ↘
Alpine regions of DE, AT, CH, FR, IT, SL

4% Nordics ↗
FI, DK, SE, NO, IS

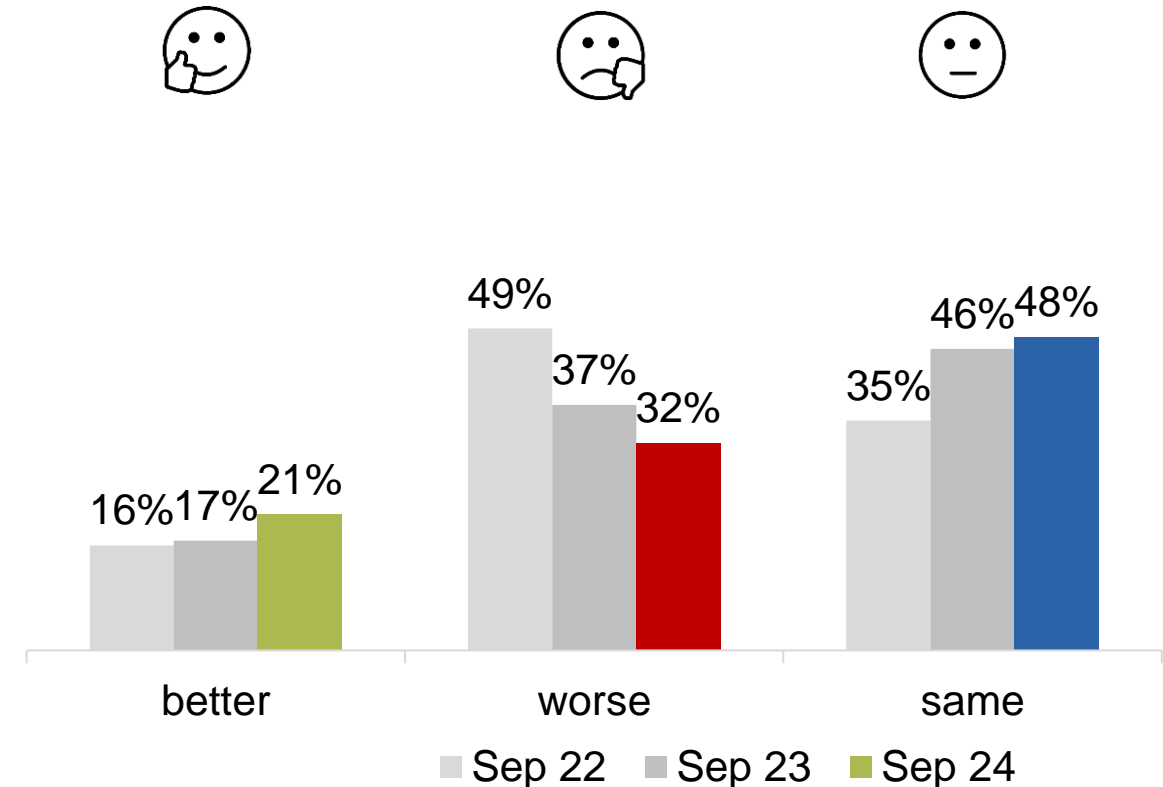
Economic situation in the eyes of the people

Nothing to be enthusiastic about, but better than previous years

General economic situation



Personal economic situation



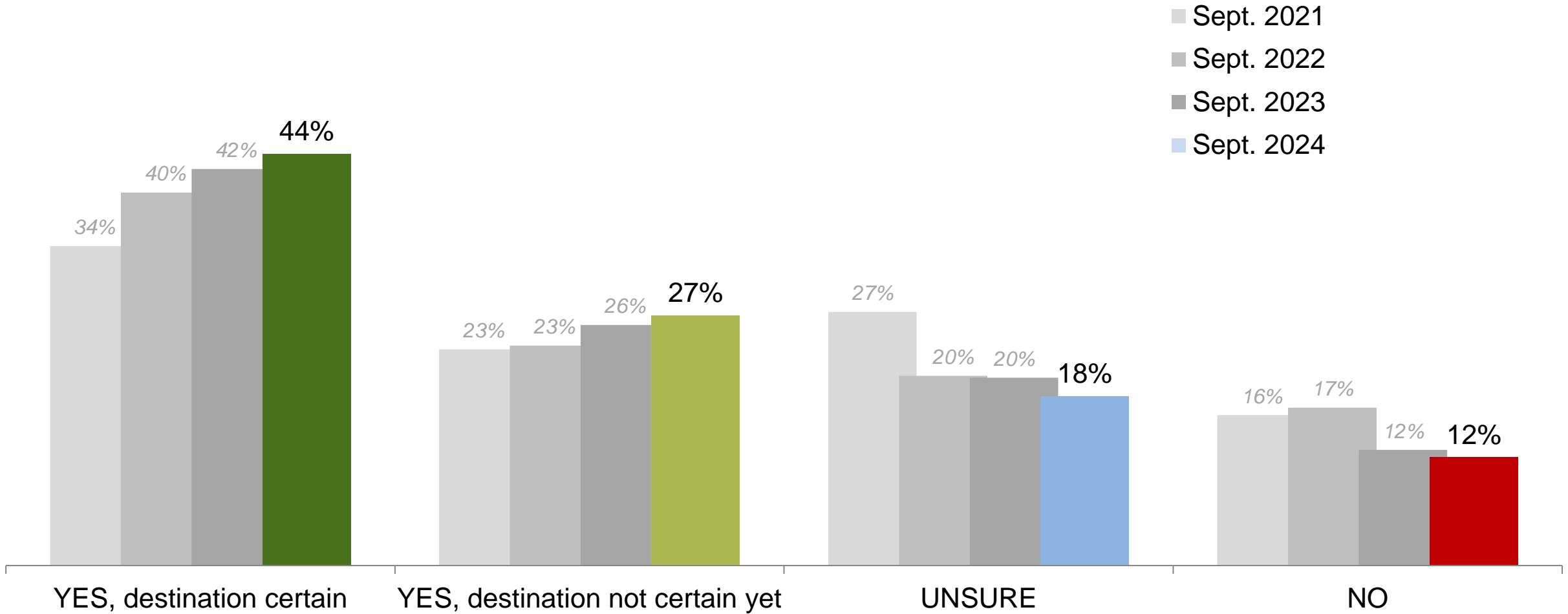
Question: How do you assess the general economic situation in Germany? What will your personal economic situation be like in about a year's time?

Basis: German-speaking population, aged 18-75, in Germany

Source: RA Special 9/2024

Holiday travel plans in the next 12 months

Fantastic!



Question: Do you already have holiday plans for the next 12 months? Which of this list applies to you?
Basis: German-speaking population, aged 18-75, in Germany
Source: RA Special 9/2024

A serene landscape photograph of a Finnish lake. In the foreground, a tree trunk is visible on the right, and a small pine tree stands in the water. The lake reflects the vibrant colors of the sky, which transitions from a deep blue at the top to a bright orange and yellow near the horizon. A forested island is visible in the distance, and the overall scene is peaceful and scenic.

How many like to
travel to Finland?

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

Finland last 3 years

0.5 % (0.3 million)

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

Finland next 3 years

5.0 % (3.5 million)

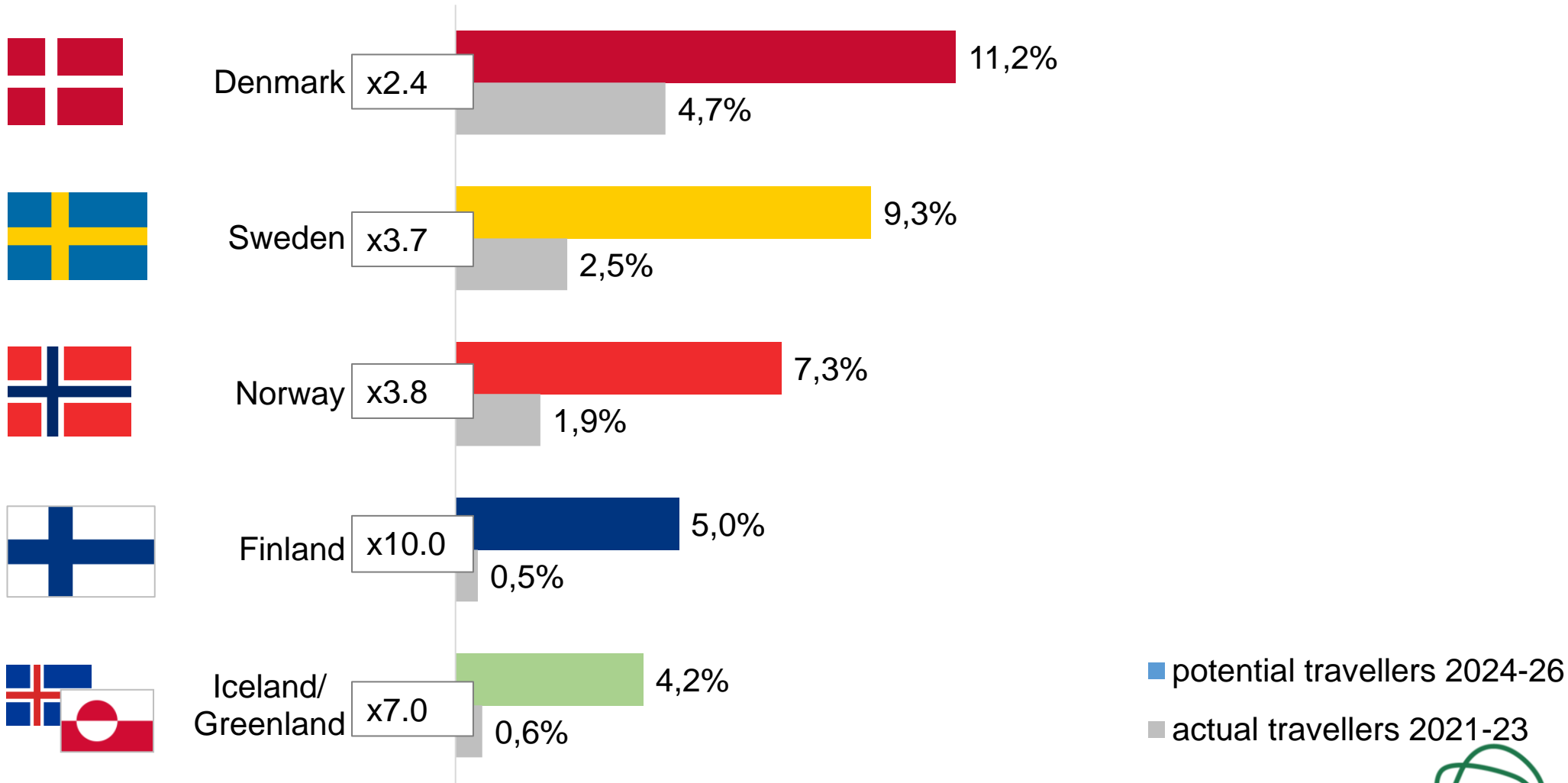
of the population in Germany (aged 14+) are "almost definitely planning" or "generally considering" to spend a (short-)holiday in Finland in the years 2024-2026.

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

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

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) And which of these countries would you generally consider as a holiday destination in the next three years?"; Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024

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



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

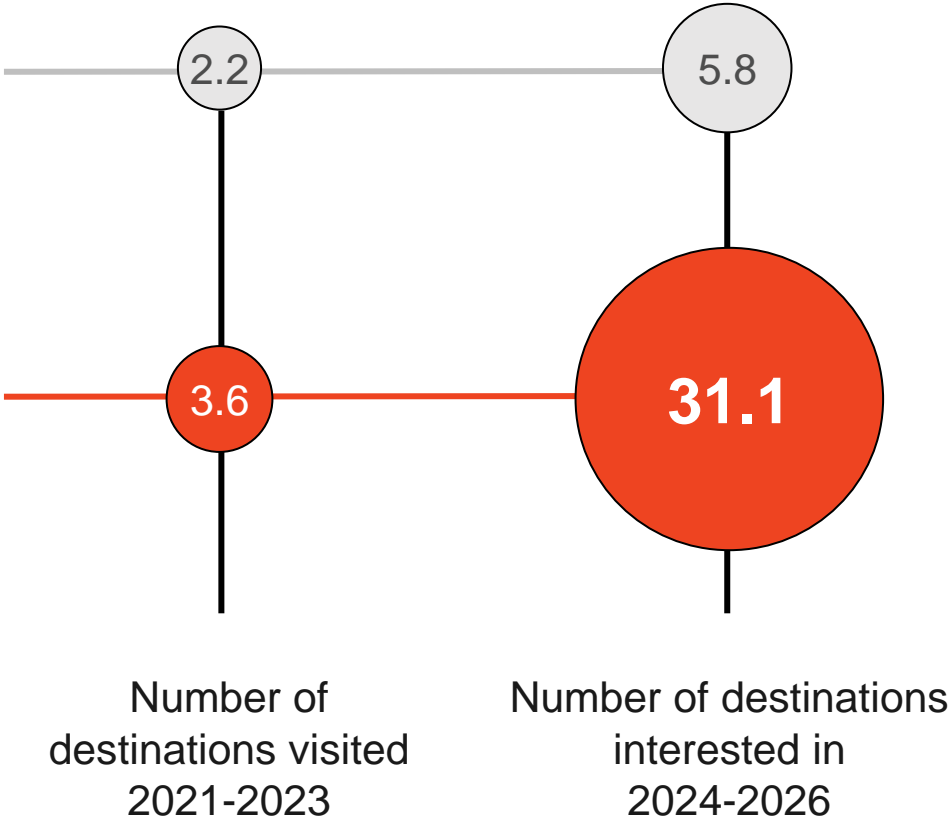
"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) And which of these countries would you generally consider as a holiday destination in the next three years?" Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024

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



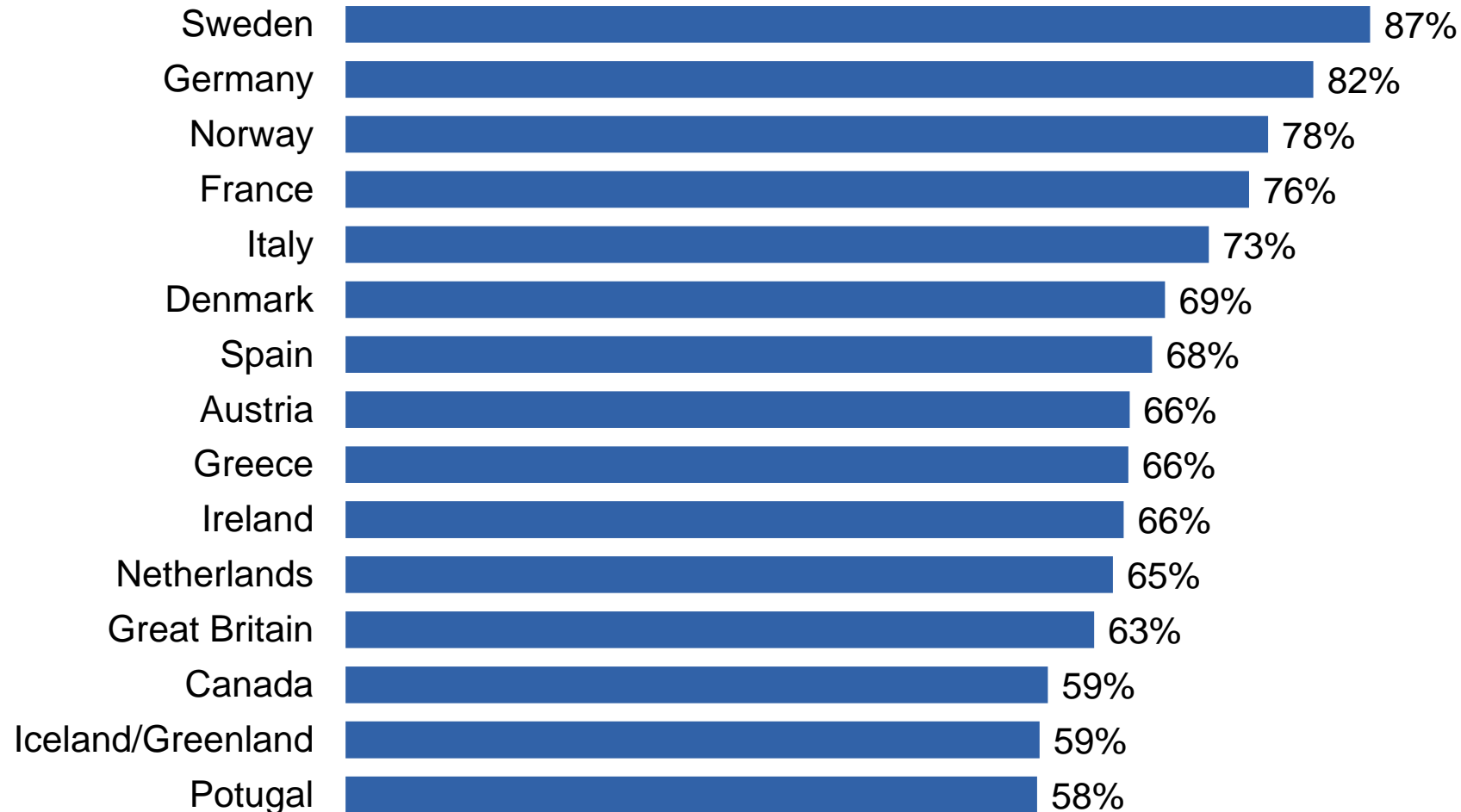
Population

Potential travellers
to Finland



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

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



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

Finland on the German market:

Most are interested in all three Scandinavian destinations



2.6 million



0.4 million



0.1 million



0.4 million

Scandinavia-Lovers

NOT

Finland-Lovers




Image of Finland as a holiday destination

Destination Image: Finland is on the map!

Scenery and Nature are leading the destination image



Awareness of Finland as a holiday destination

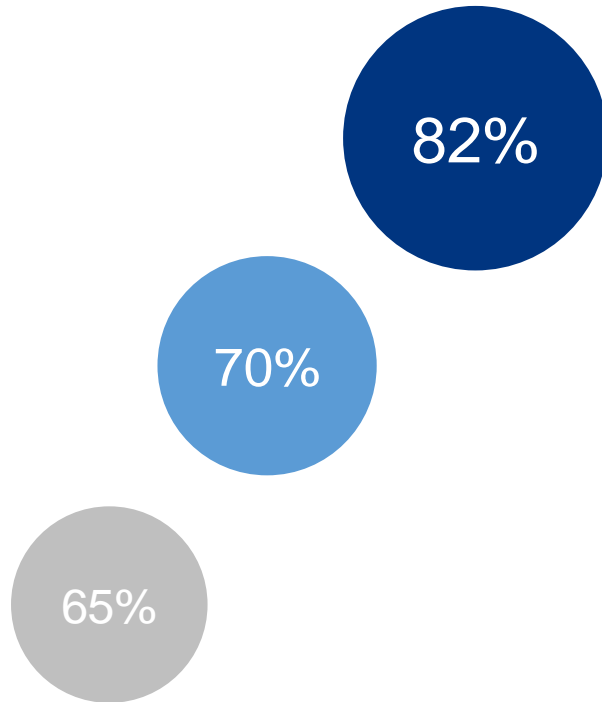


Image of Finland as a holiday destination in the population*

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

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

Destination Image:

Potential guests reveal “hidden strengths” of Finland



“hidden strengths” of Finland
with potential guests

- Great accommodation
- Appealing local cuisine
- Attractive sights & cultural offer
- Good service
- Sustainability

Finland image dynamics since
2016 with potential guests

- Nature & scenery still dominant
- Activities are up
- Culture & attractions are up
- Tourism offer is up
- Hospitality and sustainability are down



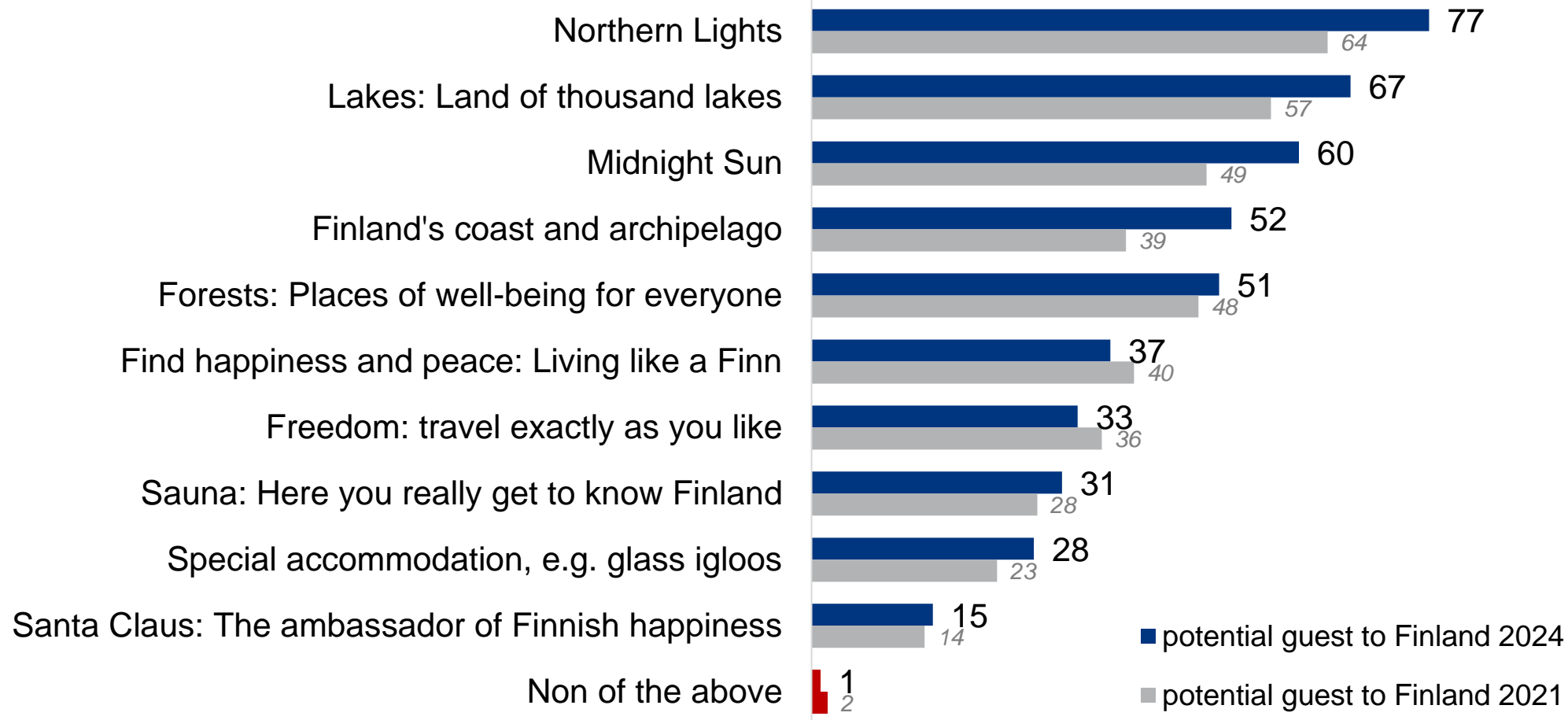
Very similar image of Finland and Sweden –
importance to stress the local and unique aspects

Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland?” Basis: German-speaking population 14+ years in Germany with an imagination and interest of travelling to Finland. Source: Reiseanalyse 2016, 2021 and 2024



Visit Finland

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



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

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



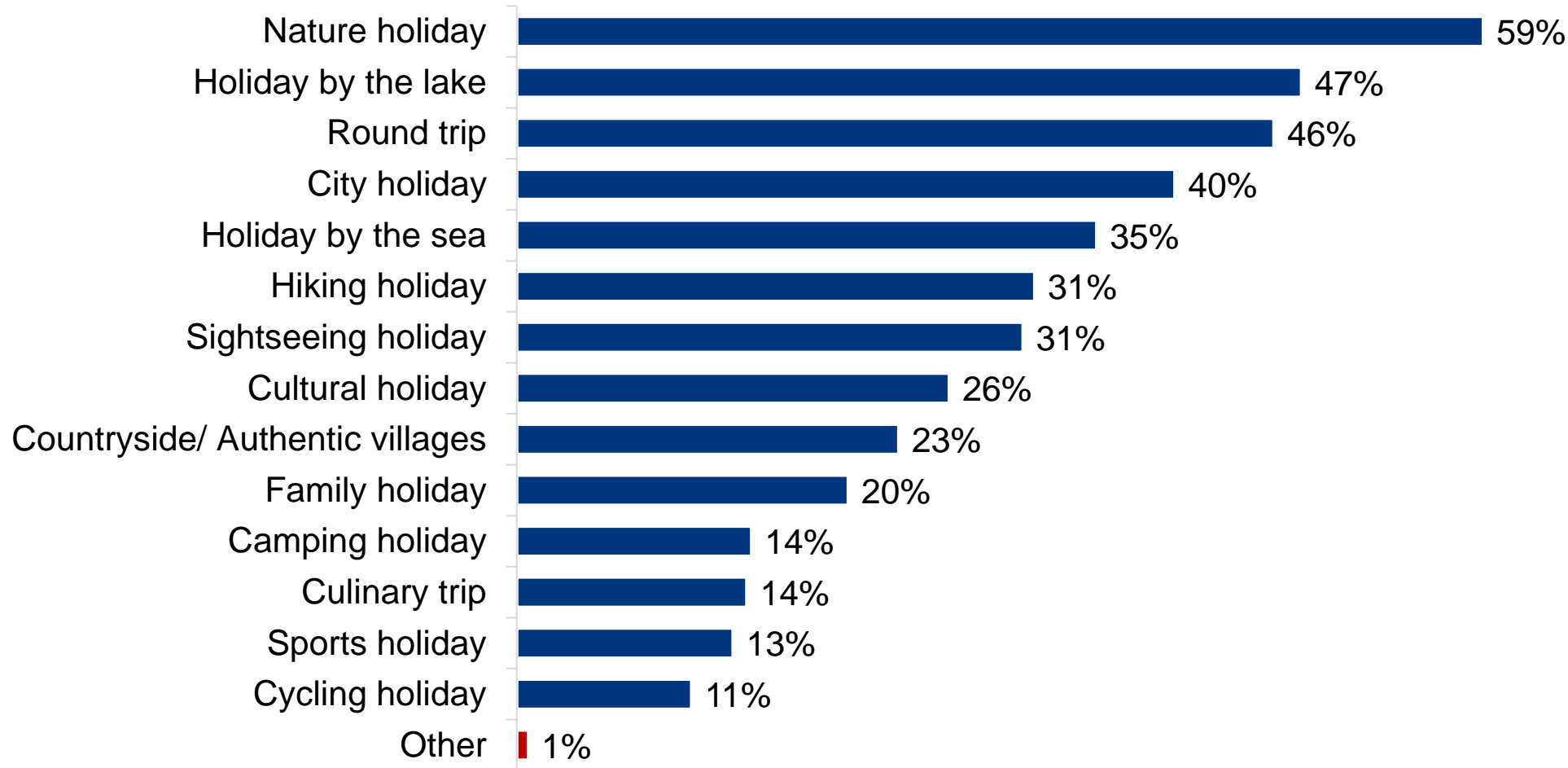
Like to experience in Finland Top 11:

Nature, food, sights – but also getting to know the local tradition

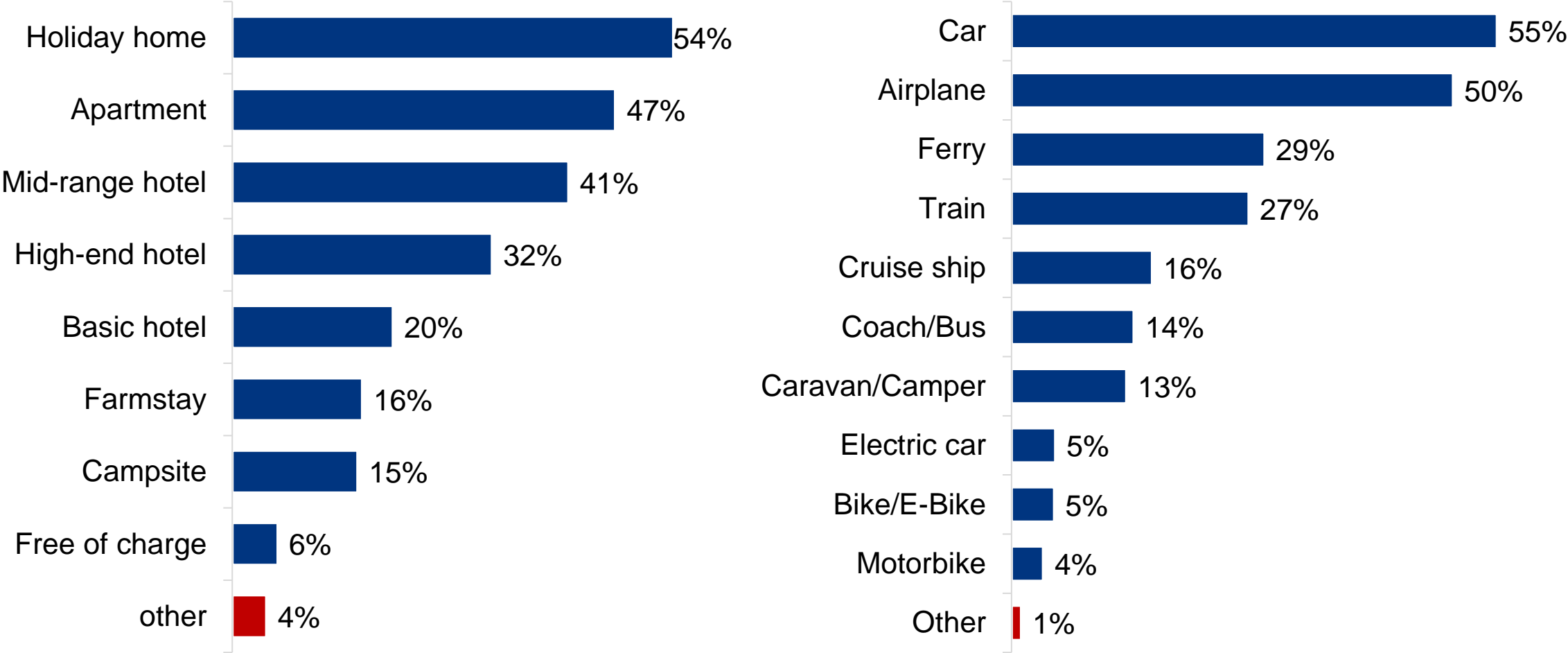


F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)
Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

Type of holiday: Nature holidays, holidays by the lake, round trips and city holidays are of most interest



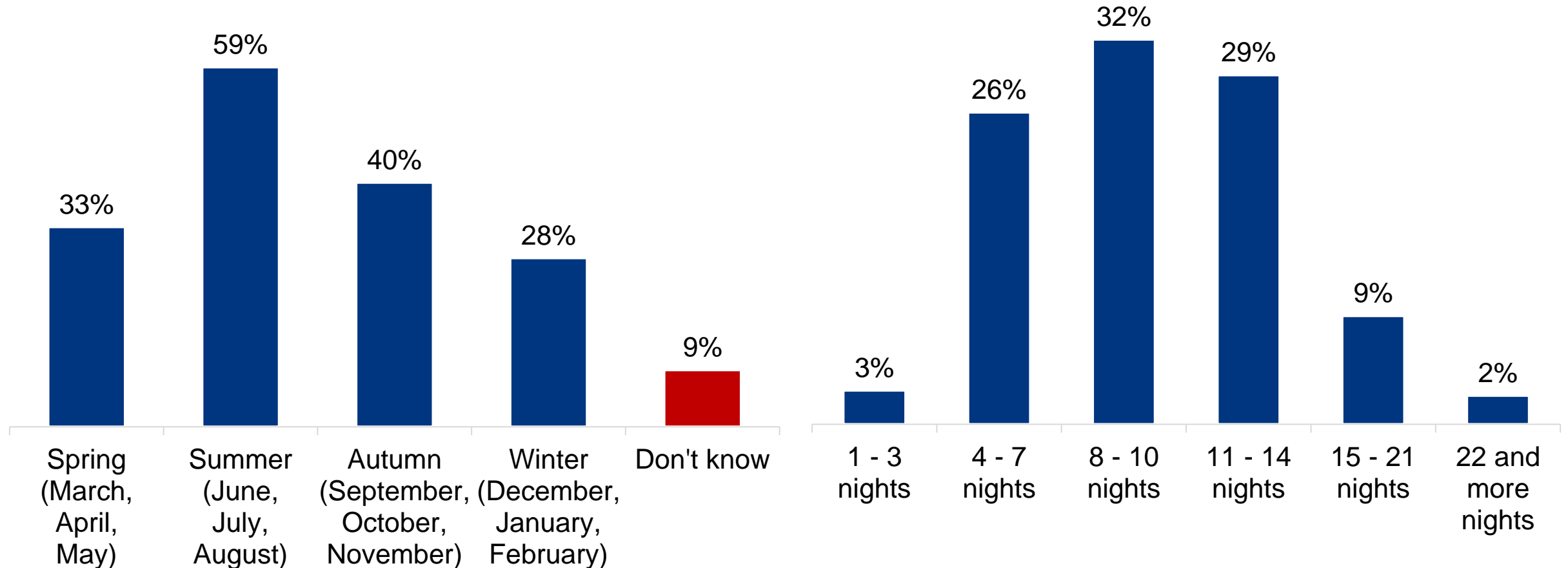
Accommodation & Transport: Self-catering and individual transport slightly in front of hotels and air travel



F5a: Which type of accommodation would you probably choose for a holiday to Finland?
F6a: Which mode of transport would you probably choose for a holiday to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

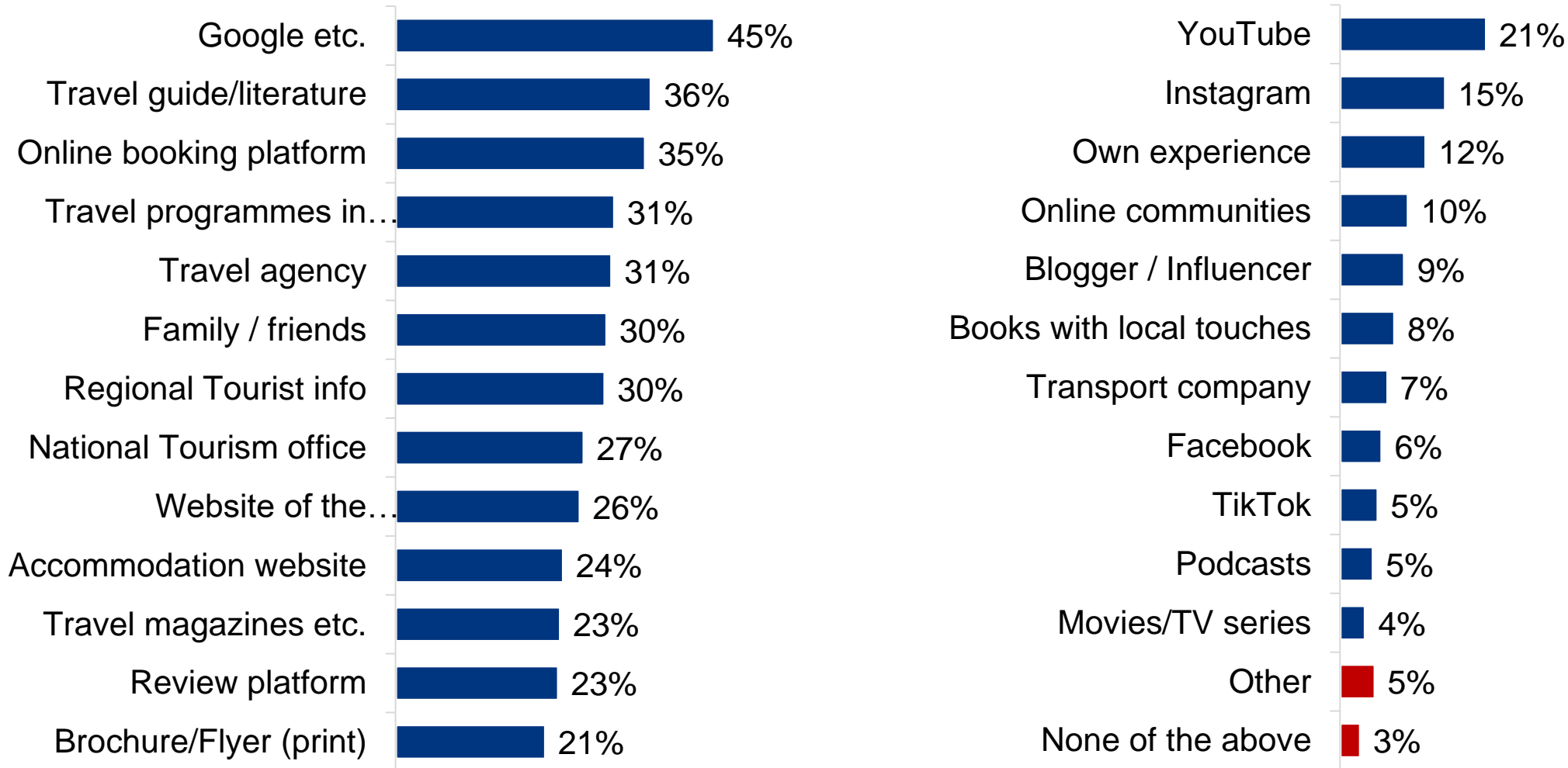
Preferred season & duration:

Summer and autumn, one to two weeks of stay



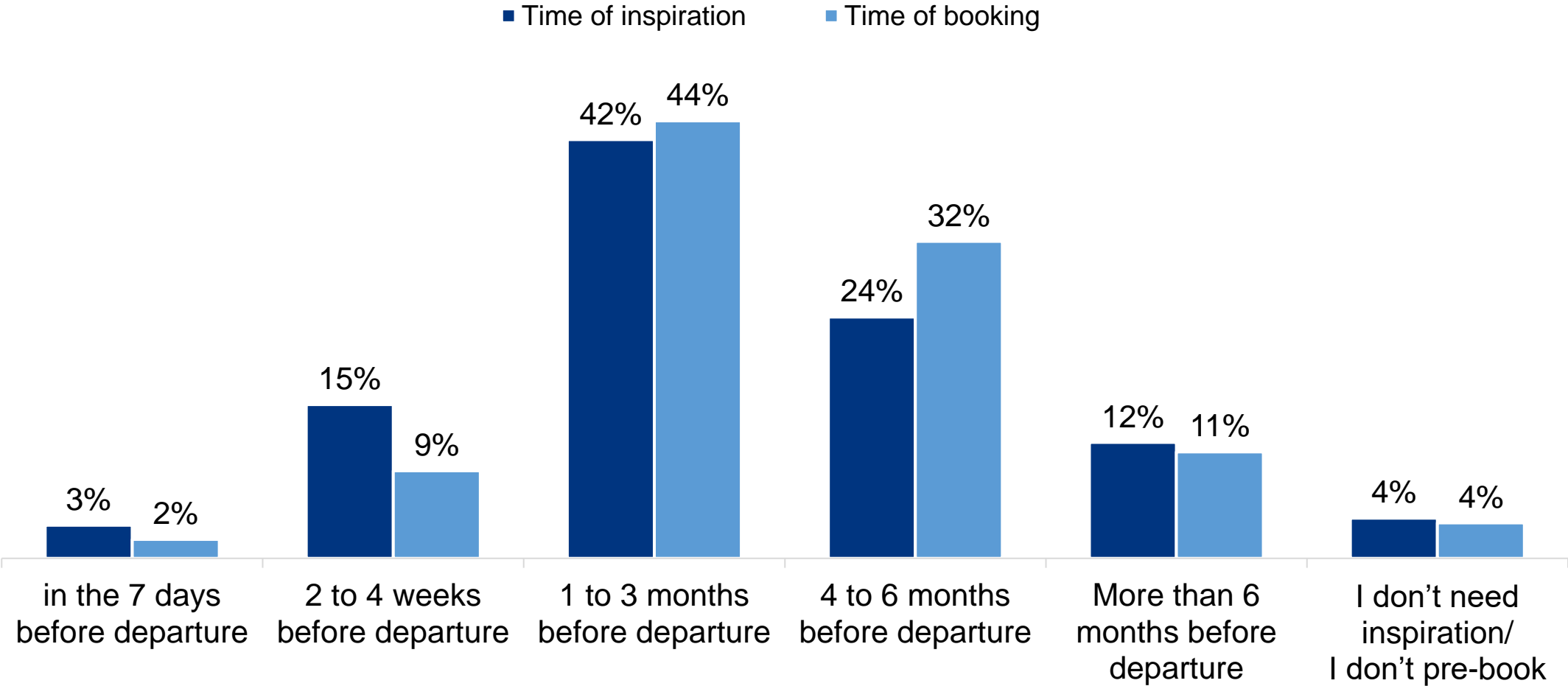
F4a: At what time of the year would you like to travel to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Inspiration and information: Search engines, travel guide books, online booking platforms are most popular



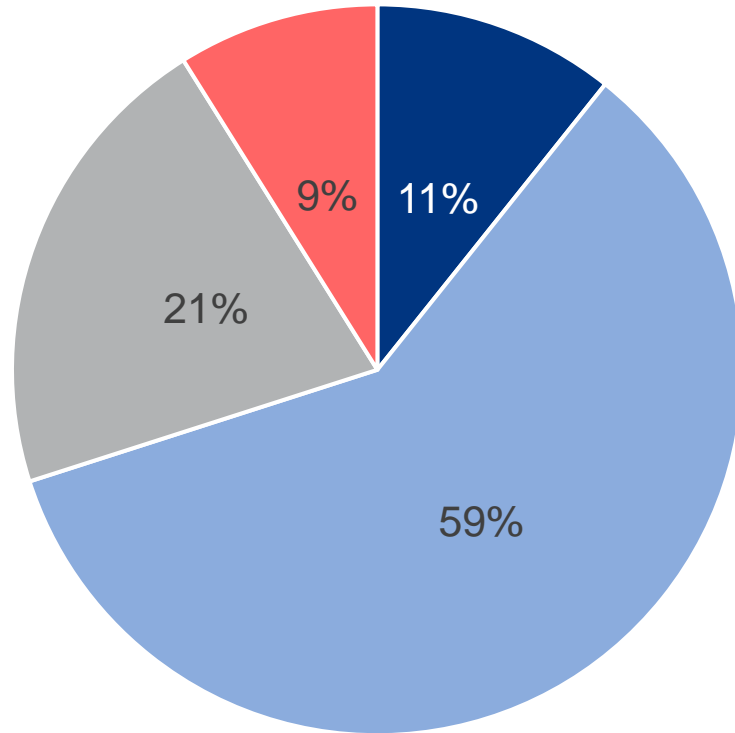
F11a: Which of these sources would you like to use to plan your trip to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Time of inspiration and booking of a summer holiday to Finland: Mostly 1-3 and 4-6 months in advance



F12Aa and F12Ba: You have just said that you would like to travel to Finland in the summer. How long before you leave would you like to look for inspiration for your summer holiday to Finland?; How long before departure would you like to book your summer holiday to Finland?
Basis: Finland Potential in summer 2024-2026 (n= 424); Source: Finland Ad-hoc-survey 2024 by FUR/NIT

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

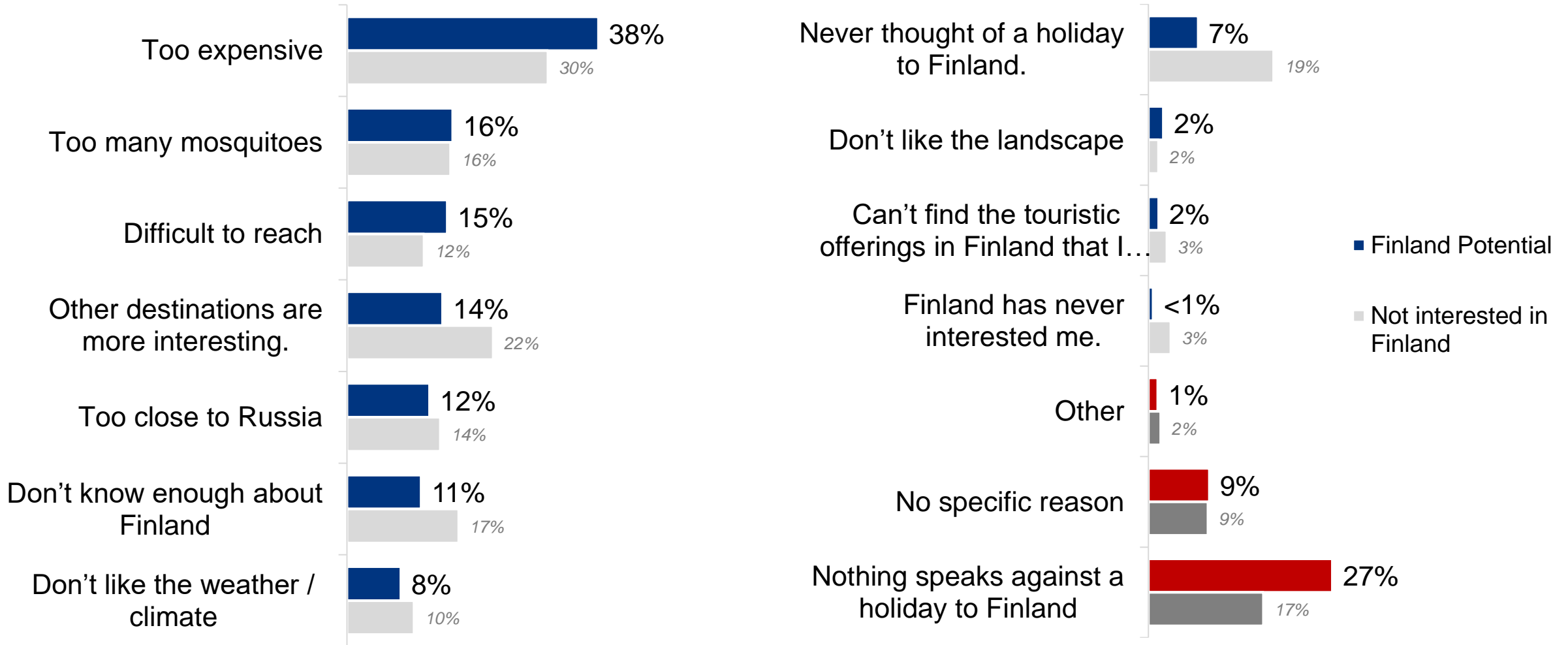


- Sustainability will be the decisive factor in deciding between otherwise equivalent offers.
- Sustainability will be – among other things – an aspect in the decision for this trip.
- Sustainability aspects will have no significance in the decision for this trip.
- I am generally not interested in sustainable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

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

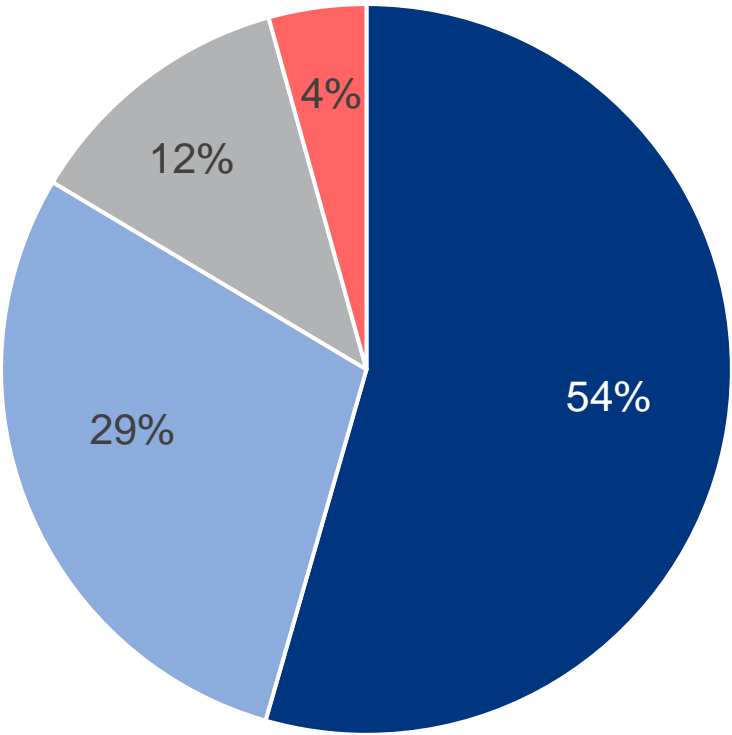
Basis: Finland Potential (n= 718); Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Finland-Barriers: the main reason for not travelling to Finland is that it is too expensive



F18: What speaks against a holiday in Finland from your point of view?
 Basis: Finland Potential 2024-2026 (n= 718); Not interested in Finland (n= 328);
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT

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



■ Nature Lover

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

■ Lifestyle Traveller

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

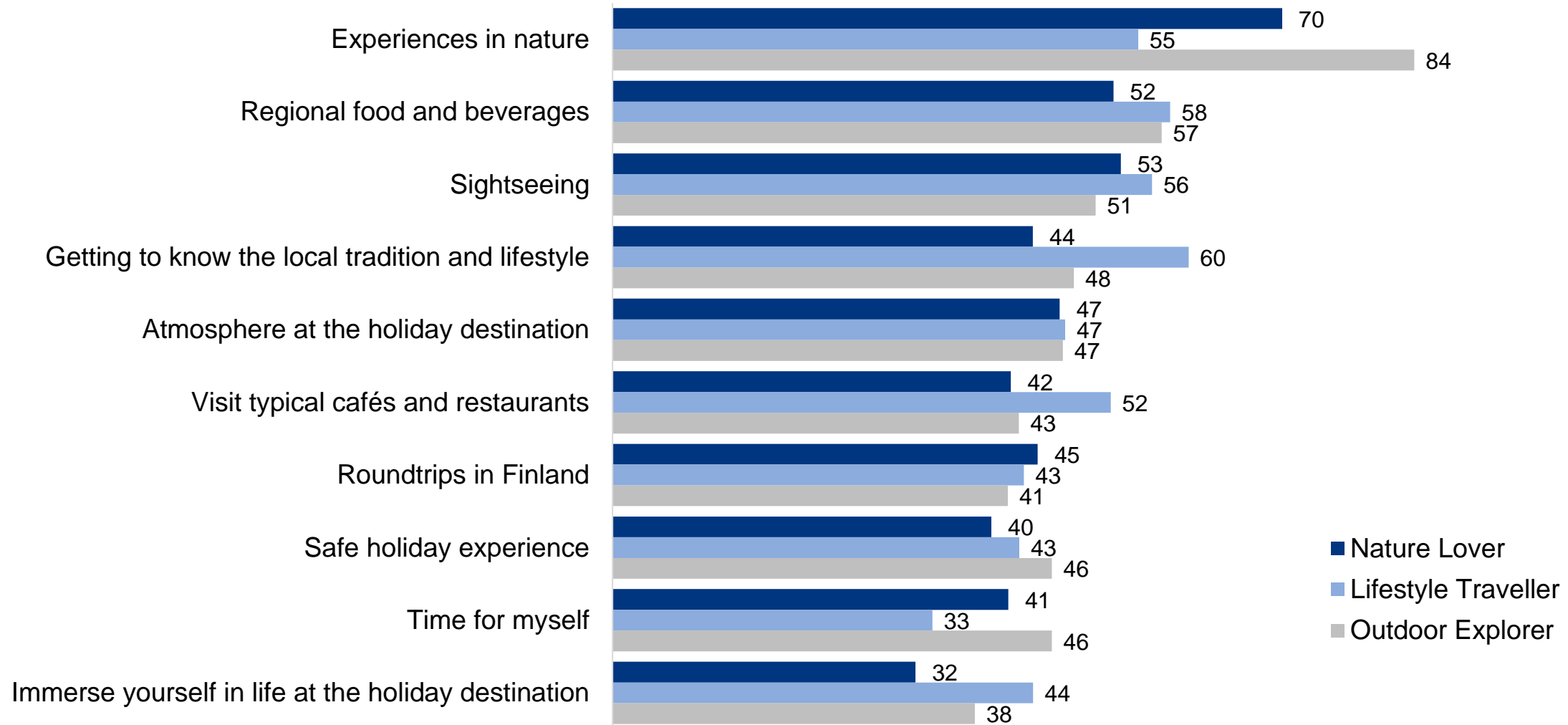
■ Outdoor Explorer

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

■ None

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

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



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

Visit-Finland-Segments characteristics

Interesting differences between the 3 segments

Nature Lover

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

Lifestyle Traveller

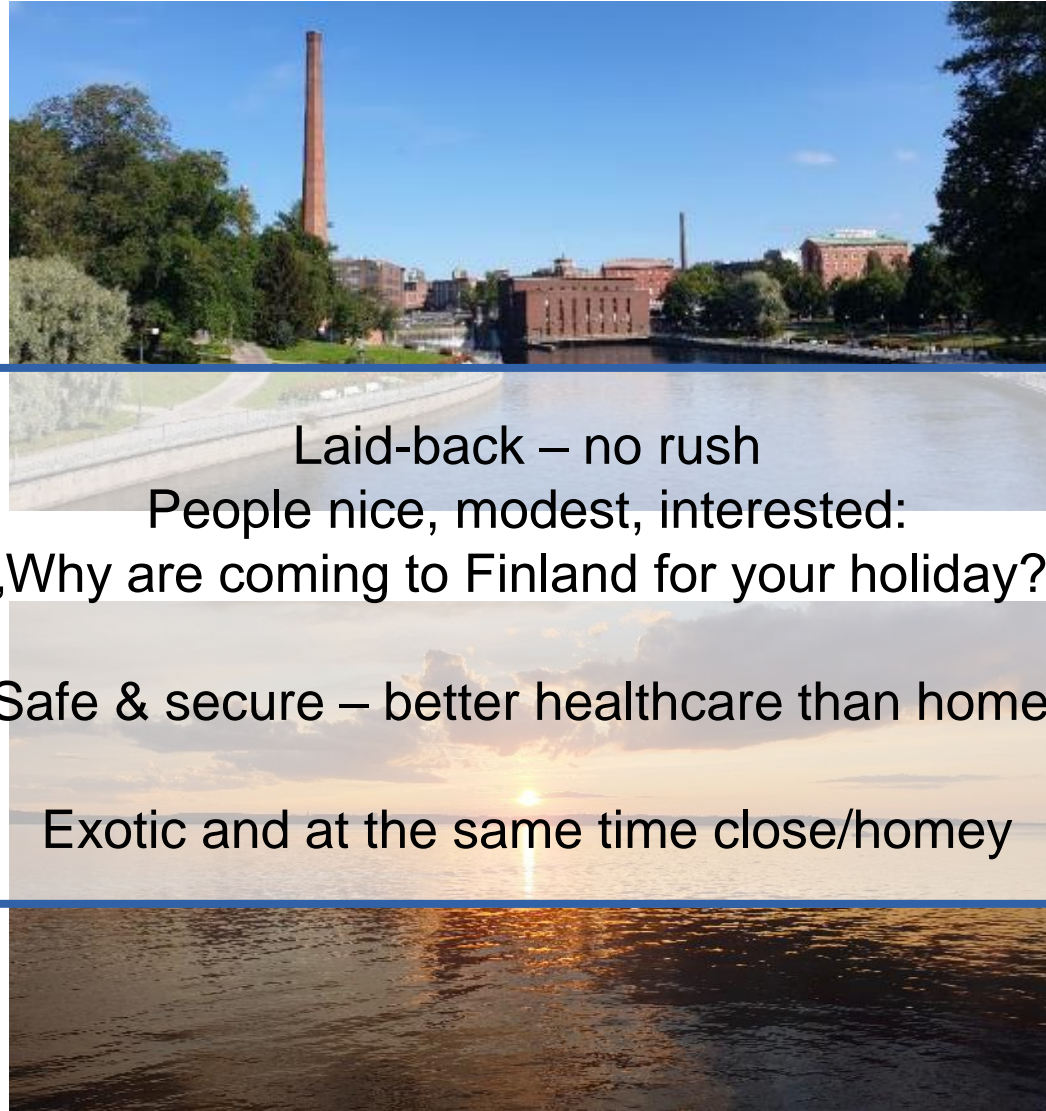
More hotels & plane
More city, culture,
sightseeing, village, culinary
holidays

Outdoor Explorer

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

Good reasons to travel to Finland

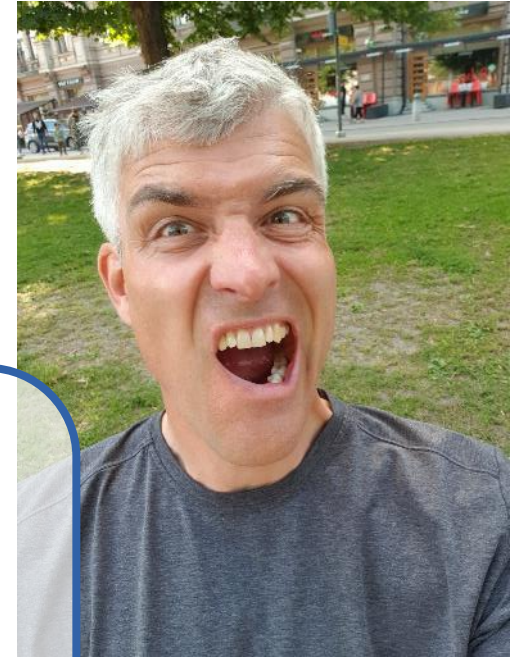
Good reasons to travel to Finland



Laid-back – no rush
People nice, modest, interested:
„Why are coming to Finland for your holiday?”

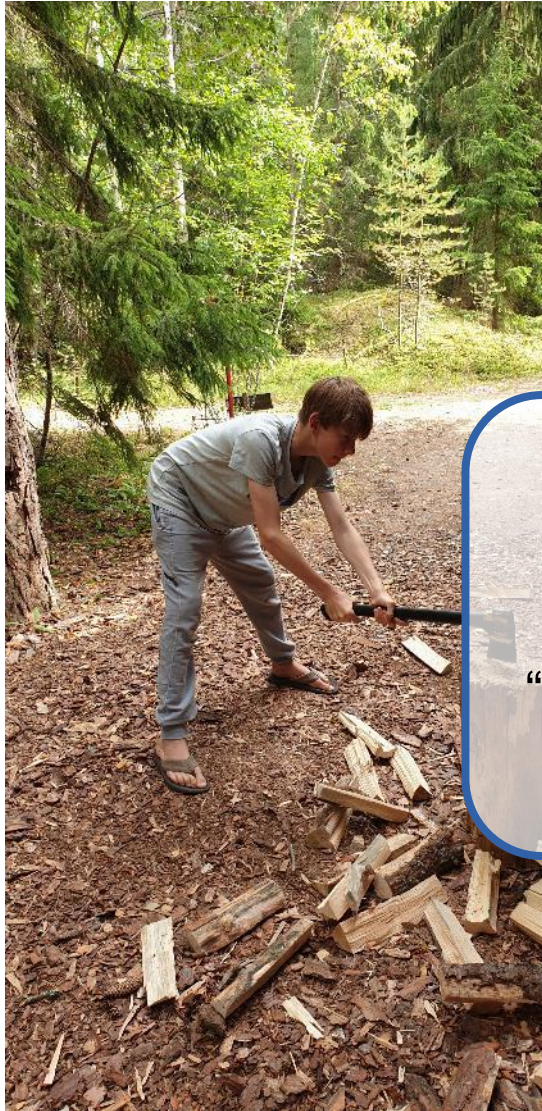
Safe & secure – better healthcare than home!

Exotic and at the same time close/homey

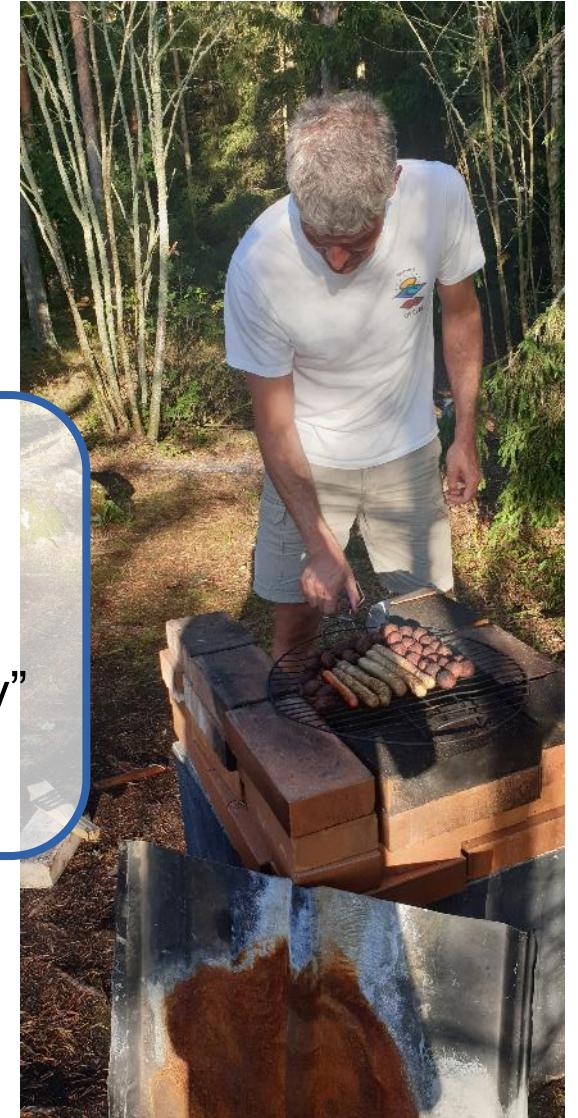
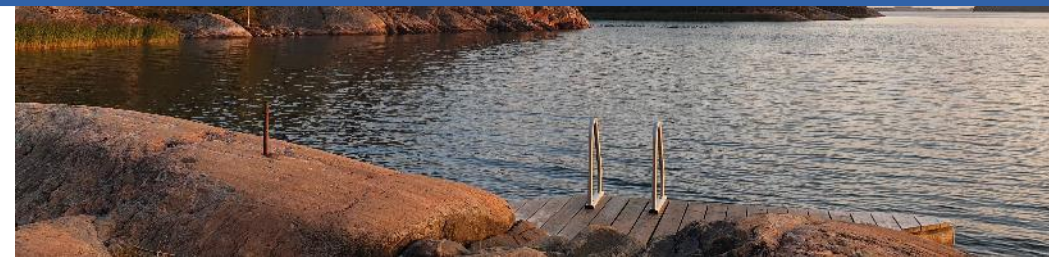


Photos: Ulf Sonntag

Good reasons to travel to Finland



Mökki-holidays –
do nothing much and it feels just right
“That is the right Finnish way for a summer holiday”



Photos: Ulf Sonntag

Things that need explanation

Mosquitos?

Too boring? Not spectacular enough?

Too cold? Bad weather?

Plumpsklos?

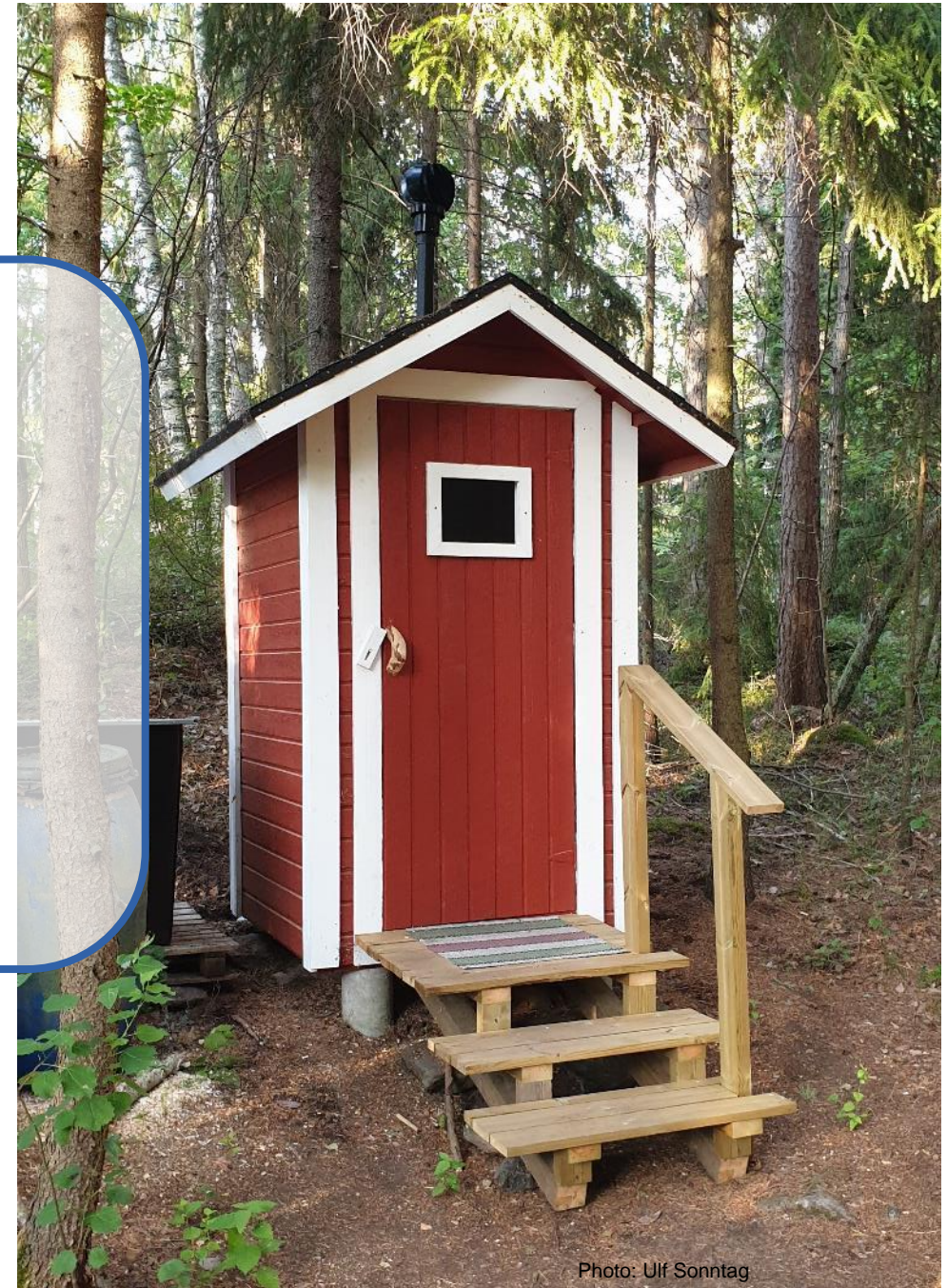


Photo: Ulf Sonntag

A man and a woman are standing on a grassy hill, looking out over a scenic view of a lake and a coastal town. The woman is pointing towards the horizon. The sky is blue with scattered white clouds. The foreground is filled with green grass and some yellow wildflowers. In the background, there are trees, a road with cars, and a body of water with some boats.

Go for it!

Call to action!

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



Thank you & let's stay in touch!

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