

Germany Market Update Webinar

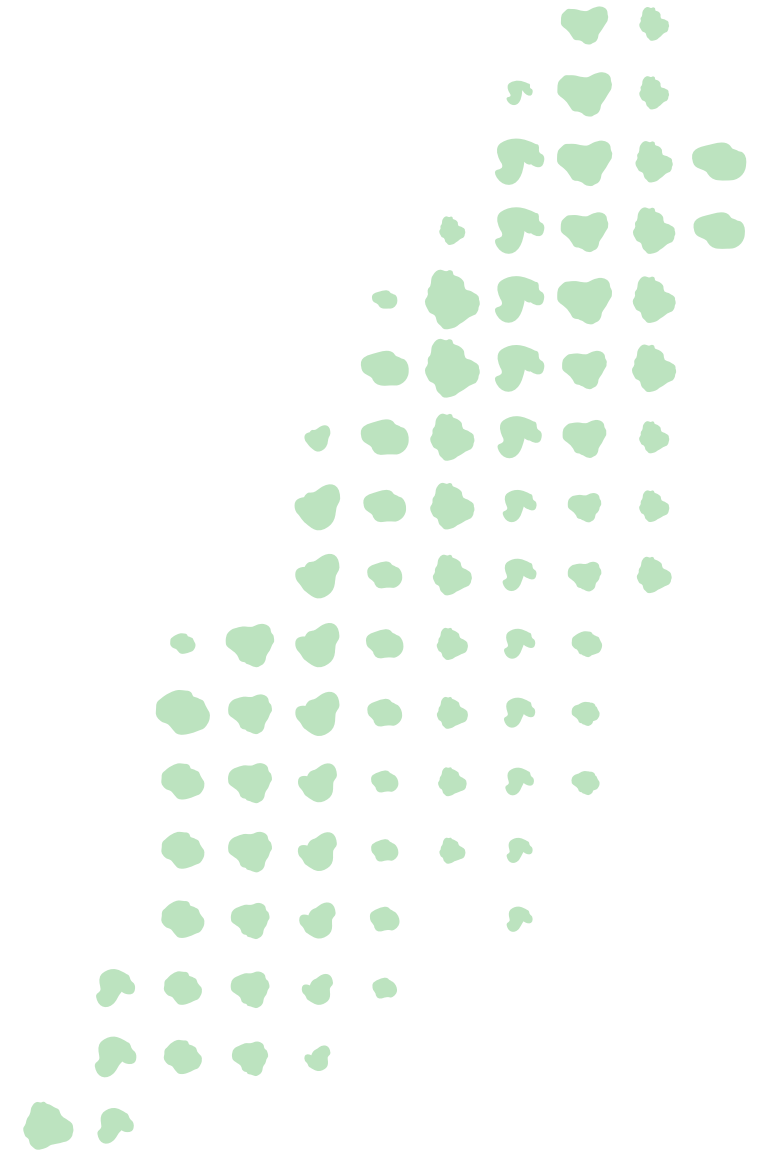
May 2026

Jyrki Oksanen
Ulla Hempel
Heli Saari



Agenda

- **Welcome**
- **Germany market overview**
- **Market insights**
 - 2025 statistics
 - Winter season DEC25 – FEB26
 - Summer outlook
- **Joint Promotions**
- **2027 planning**



Germany market overview

Regional Source Distribution (Bundesländer)



Key Federal States Driving Demand

North Rhine-Westphalia leads outbound travel due to its population and economic strength, followed by Bavaria and Baden-Württemberg.

Role of Secondary States

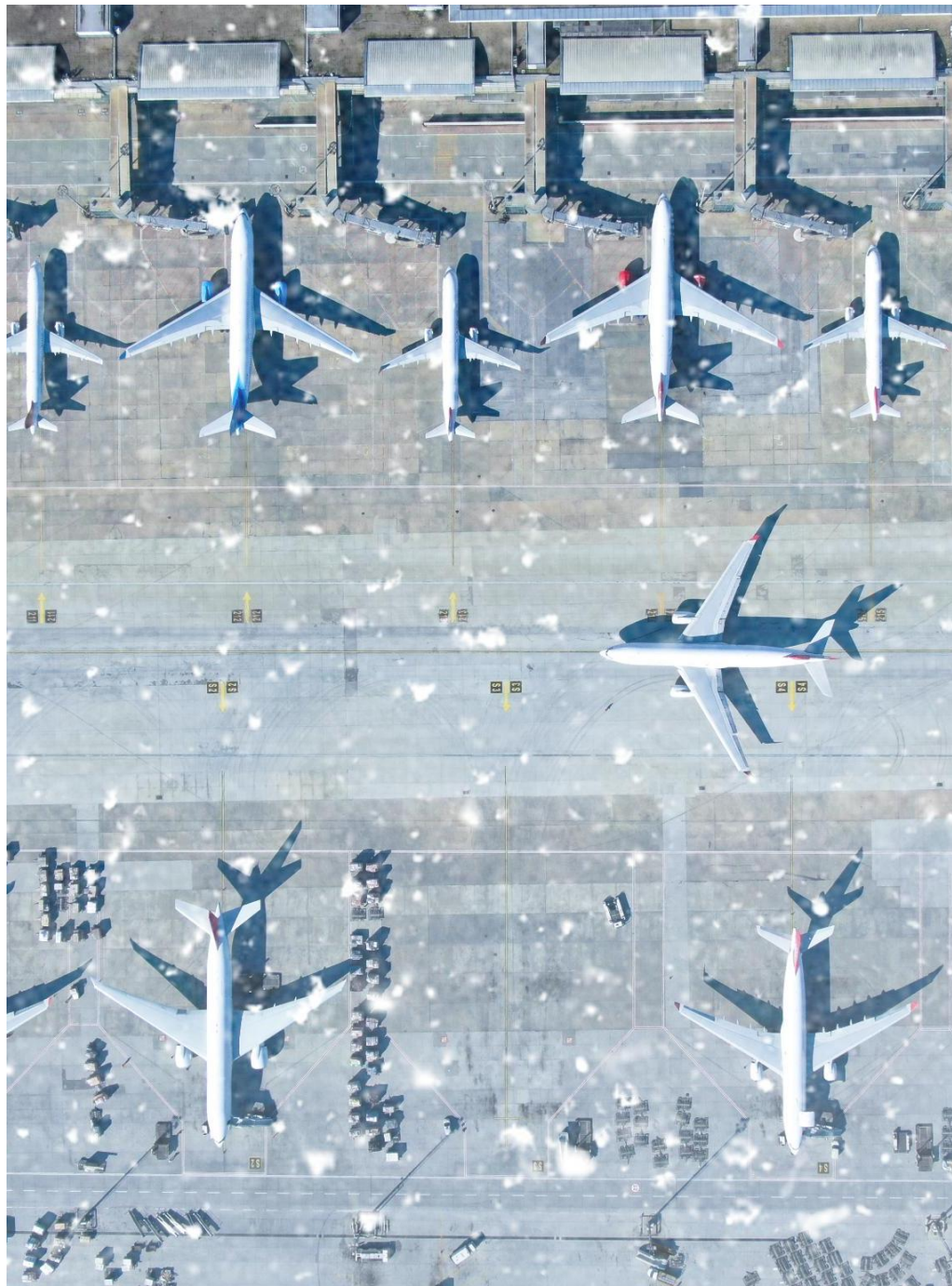
Lower Saxony, Hesse, and Berlin contribute significant travel volumes reflecting urban centers and economic hubs.

Regional Travel Behavior Variations

Southern states show higher travel rates to Alpine and Mediterranean areas; urban centers exhibit frequent travel patterns.

Marketing Strategy Implications

Segmented regional demand guides targeted marketing, localized partnerships, and optimized media strategies.



Air Gateway Concentration and Connectivity

Major Airport Hubs

Frankfurt and Munich airports dominate Germany's air travel with high passenger volumes and international connections.

Regional Airport Importance

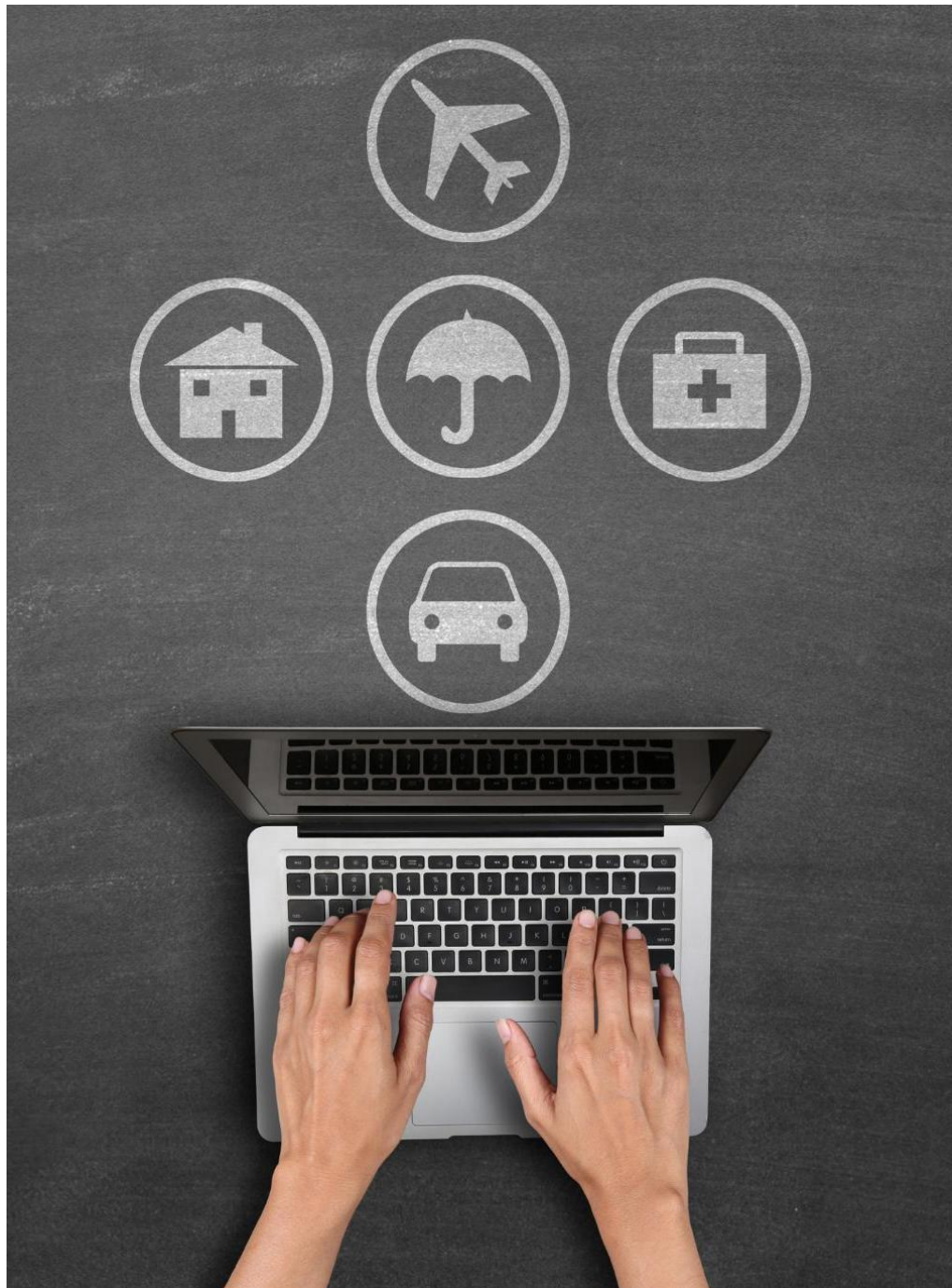
Berlin Brandenburg, Düsseldorf, and Hamburg airports support regional outbound leisure travel and accessibility.

Impact on Travel Patterns

Airport infrastructure influences travel behavior, route development, and airline partnerships across Germany.

Strategic Market Insights

Understanding airport catchments helps tourism stakeholders align marketing with airline capacity and regional demand.



Distribution Structure: Organised vs Self-Organised Travel

Balanced Market Segments

Organized and self-organized travel segments each generate about €40 billion annually in Germany's travel market.

Role of Organized Travel

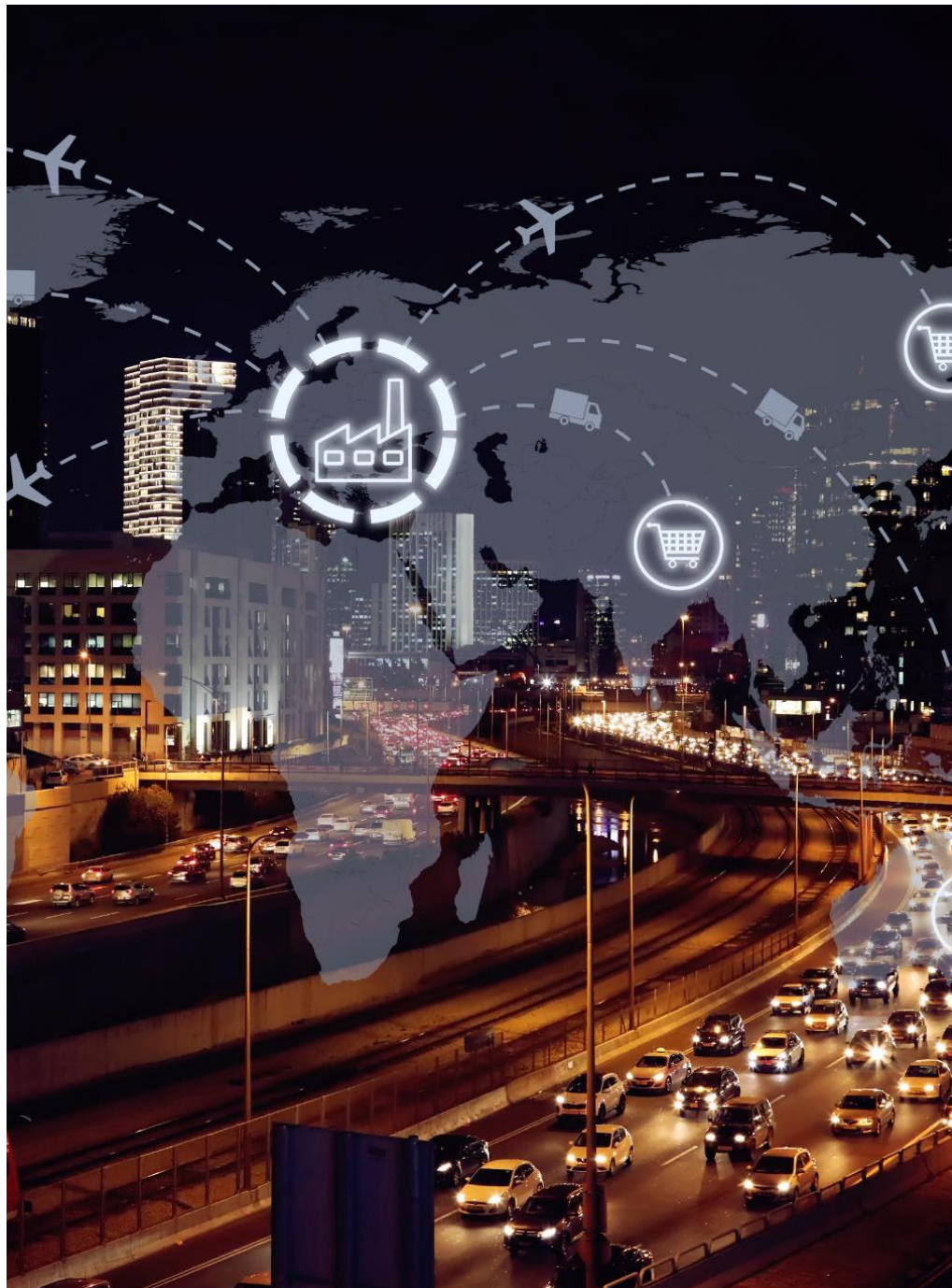
Organized travel offers bundled services and expert advice, catering to complex logistics and security needs.

Growth of Self-Organized Travel

Digital platforms empower travelers to independently book flights and accommodations, favoring flexibility and customization.

Multi-Channel Marketing Strategy

Destinations must engage both traditional intermediaries and digital platforms to maximize reach and conversions.



Digital Customer Journey and AI Adoption

AI Impact on Travel Planning

AI influences early travel planning stages for inspiration and destination discovery among digitally savvy travelers.

Traditional vs AI Channels

Traditional channels remain dominant but AI usage grows, especially among younger demographics for initial travel ideas.

Marketing and Omnichannel Strategy

Tourism marketers must optimize digital content and integrate AI platforms for seamless omnichannel customer experiences.

AI as Opportunity and Disruption

AI enables personalized, efficient, and data-driven traveler engagement, reshaping customer journeys in tourism.

Why this market?

Germany is Finland's number one leisure source market

German market has 10 x higher potential than what we can convert into visitors

Germans travel to Finland in all seasons and to all regions

Germans are spending

Germans stay longer on long holidays ca 10 days summer, 7 days winter.

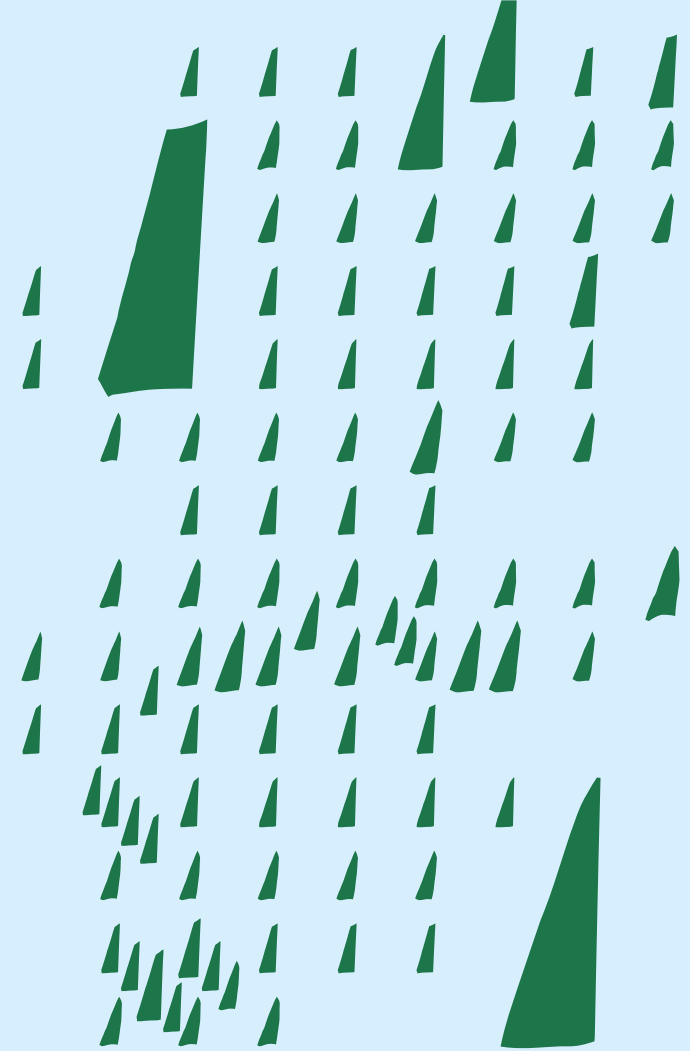
Germans are interested in nature and culture in Finland.

Finland is known in the area and has a positive image

as one of the Nordic countries

Border survey

German trips to Finland



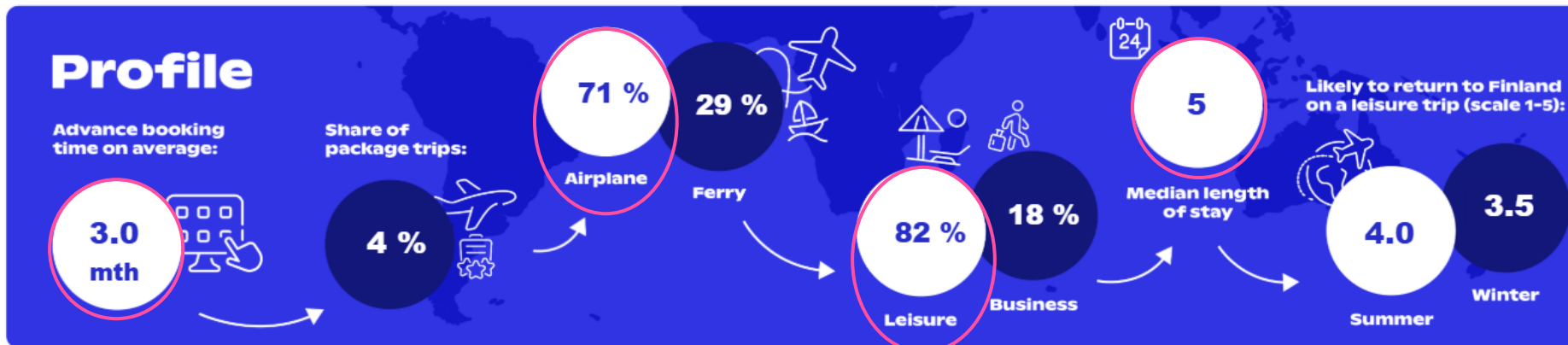
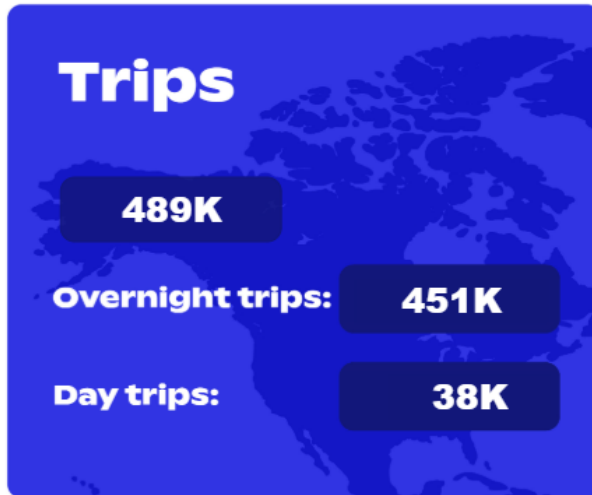
All German travellers to Finland Year 2025

Border Survey
MatkailijaMittari
Visit Finland

Year: 2025 | Quarter: All | Month: All | Latest 12 months | Start / End date: 01/2025 - 12/2025

Departure region: All | Departure Country: Germany | Travel Destinations: All | Travel Type: All | Travel Purpose: All

Menu | Map | FI | EN

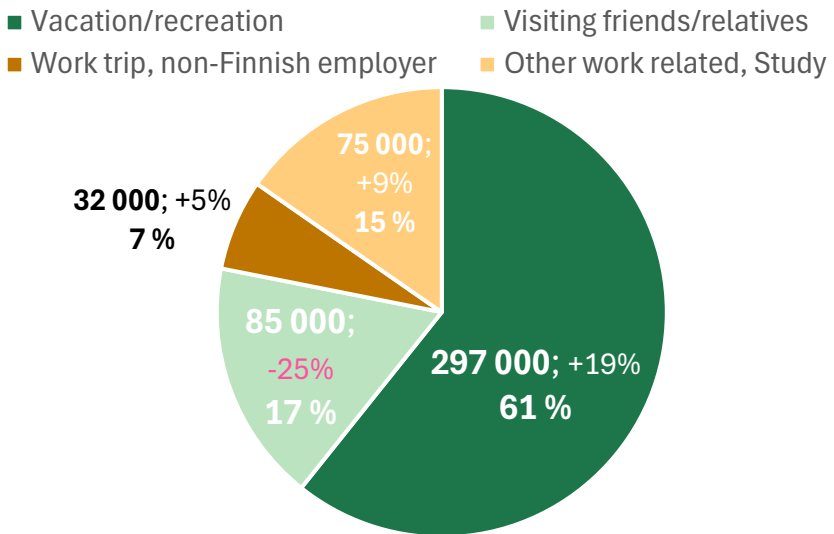


Country	Trips	YoY
Estonia	773,000	-3%
Germany	489,000	+6%
Sweden	468,000	-6%
UK	451,000	+17%
USA	257,000	-10%
France	253,000	-1%
Spain	204,000	+2%
Italy	195,000	+2%
Netherlands	161,000	+30%
Poland	135,000	+14%
Japan	129,000	+75%
China	106,000	+1%

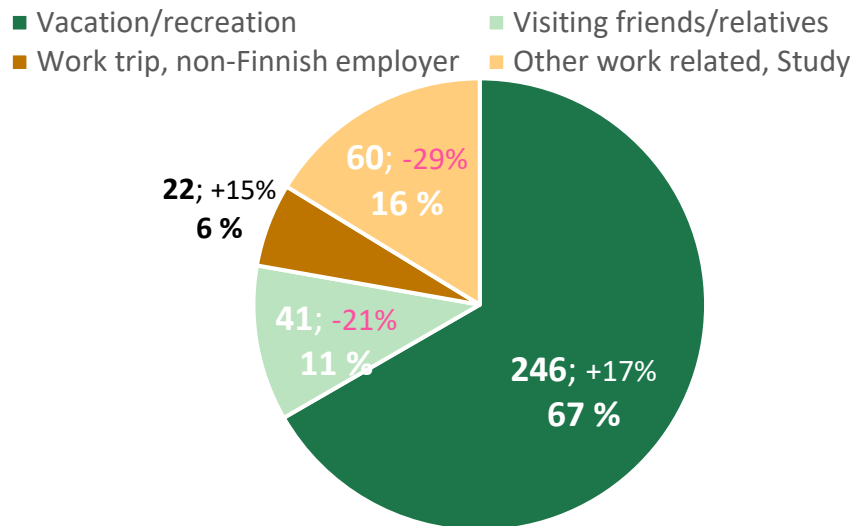
Country	Spend M€	YoY
Germany	369	-2%
Estonia	310	-6%
UK	306	+12%
France	260	+3%
USA	227	-27%
Sweden	182	-5%
Spain	176	+14%
Italy	137	-9%
Netherlands	132	+20%
China	120	-22%
Japan	98	+61%

German trips & spending by purpose & main destination 2025

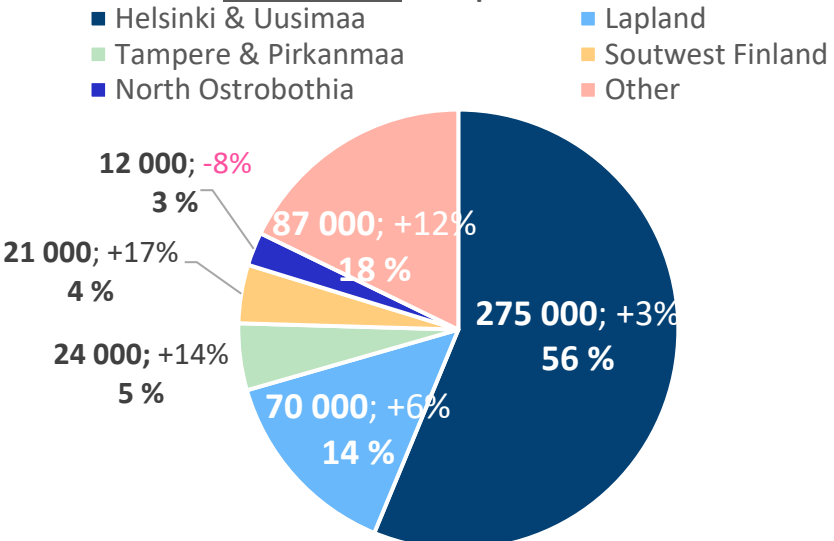
Germany: Trips to Finland



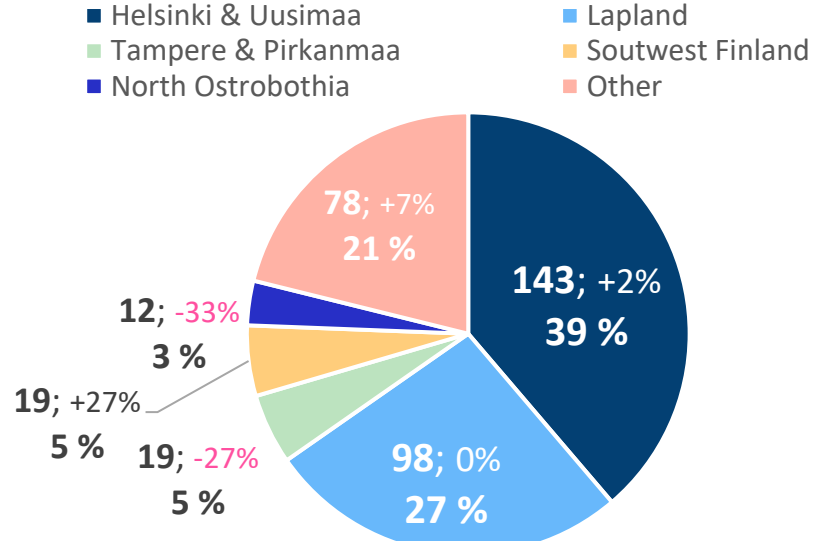
Germany: Spending in Finland, M€



Germany: Trips to Finland

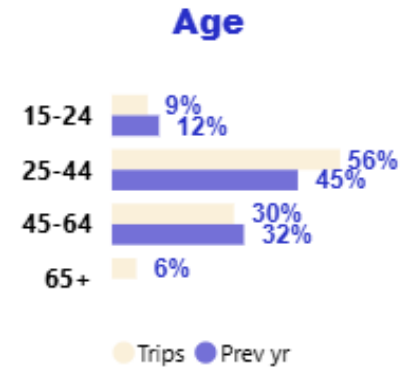
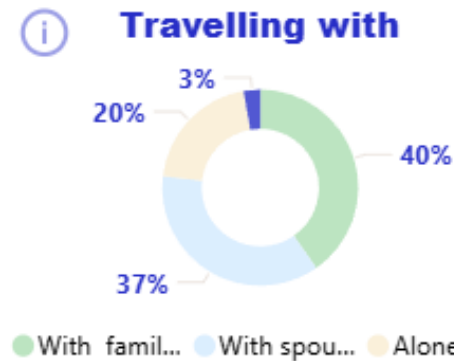


Germany: Spending in Finland, M€

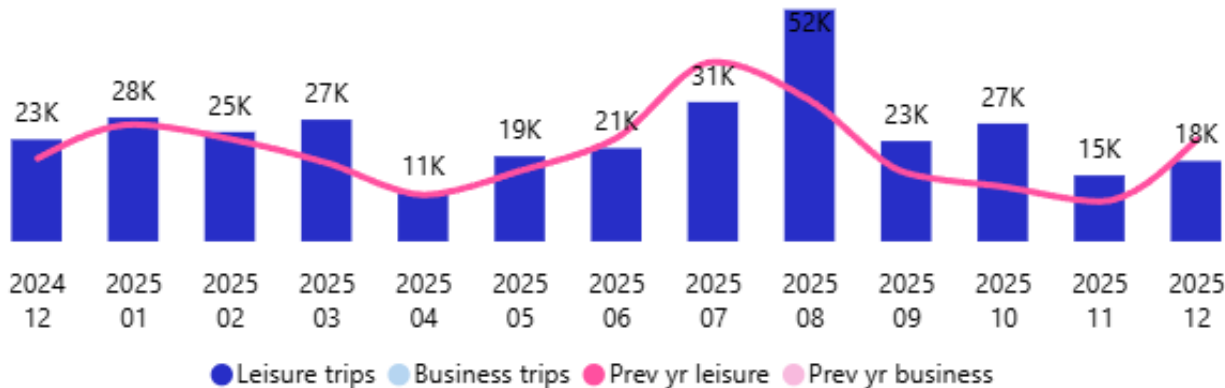


German vacation/recreation travellers to Finland - Year 2025

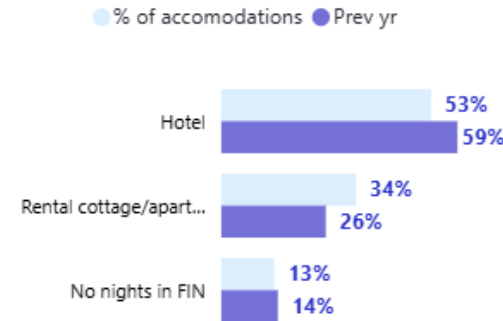
- Holiday travel from Germany to Finland increased clearly the most in **August** compared to the previous year. Also, **spring** and **autumn** were more popular than the year before.
- Travelling with **family or friends** as well as travel in the age group of **25-44 years** increased.
- Even though more than half of the German holiday travellers chose **hotel**, the share of **rental cottages / apartments** increased.
- **Activities in nature** were the most popular among the experiences in Finland during the holidays.



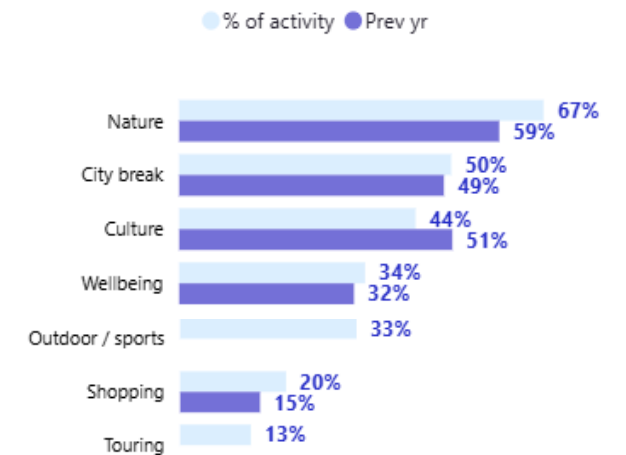
Monthly trend



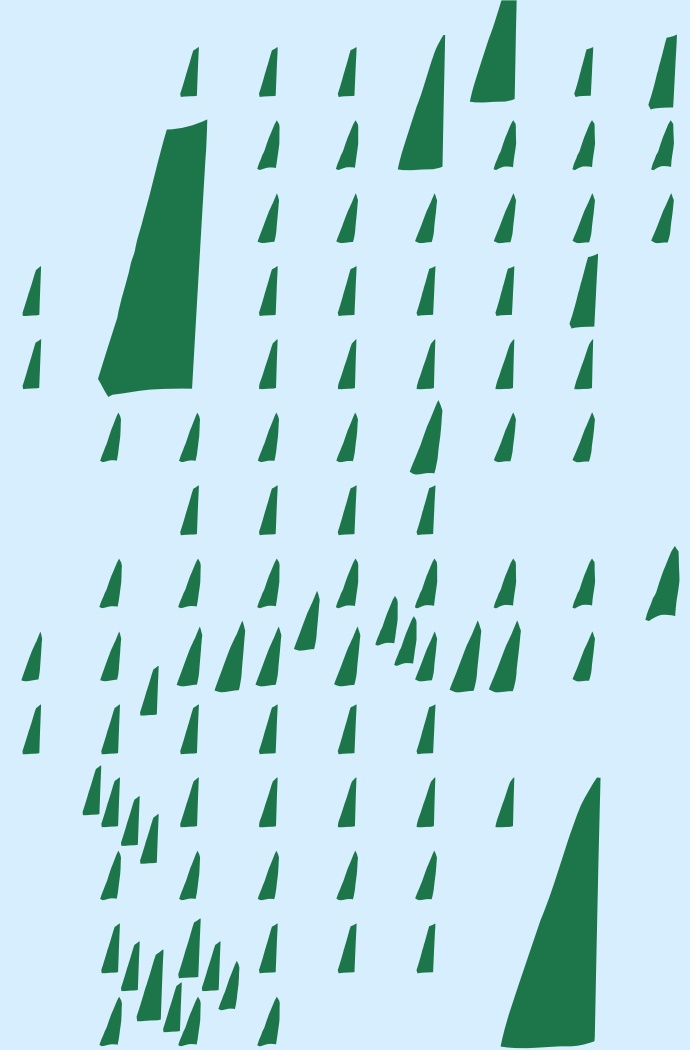
Accommodation



Experiences & attractions



German registered overnights in Finland



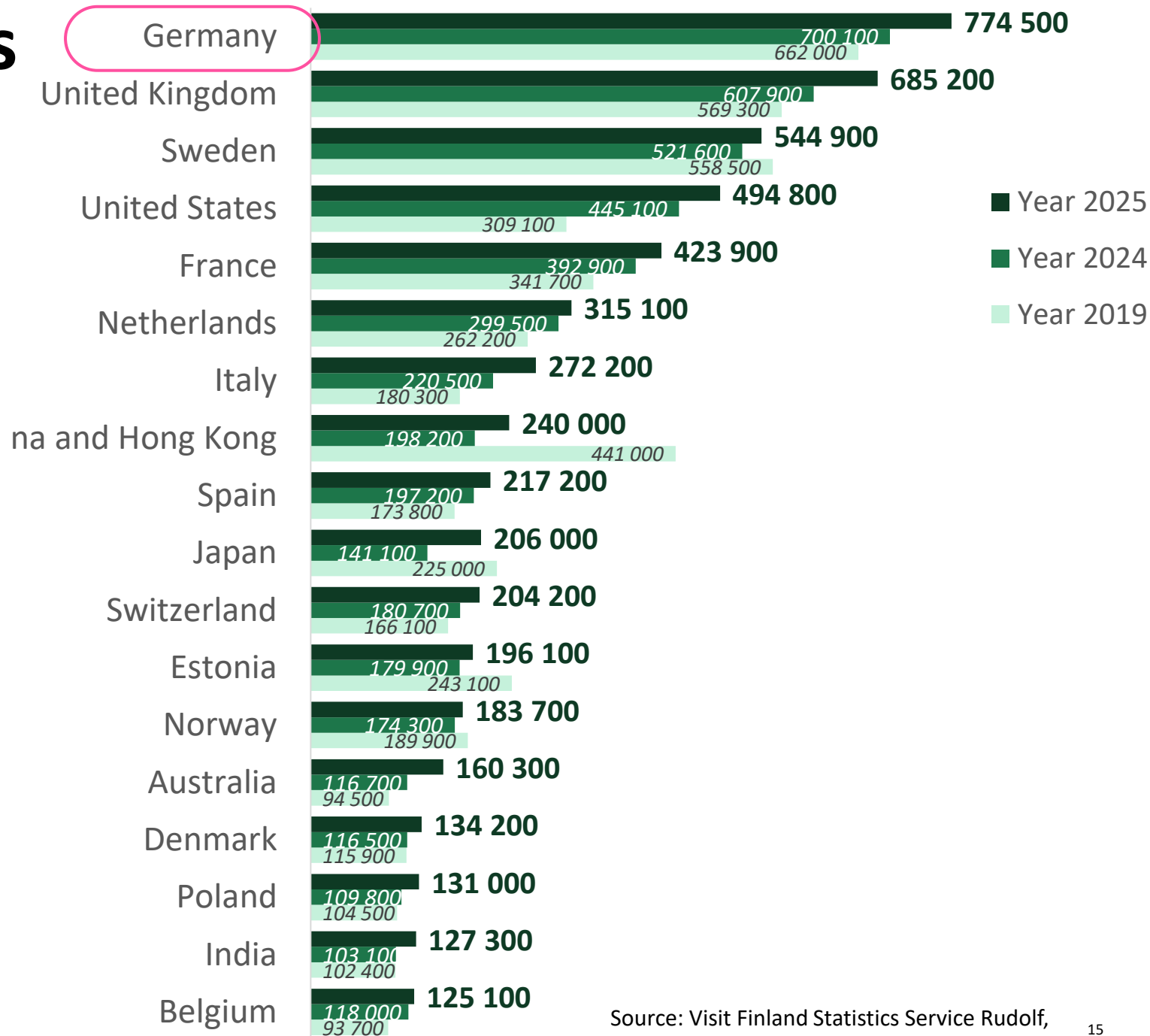
Main source markets in 2025

774,500 German
registered overnights in 2025
+11% vs. 2024 (+17% vs. 2019)

German registered overnights reached pre-pandemic level already in 2023 and the **strong growth has continued.**

In addition to the registered overnights, **German travellers are increasingly choosing short-term rentals** for their trips. In 2024, the share of German visitors' short-term rentals was **36% of their total of 1.1 million paid overnight stays** in Finland.

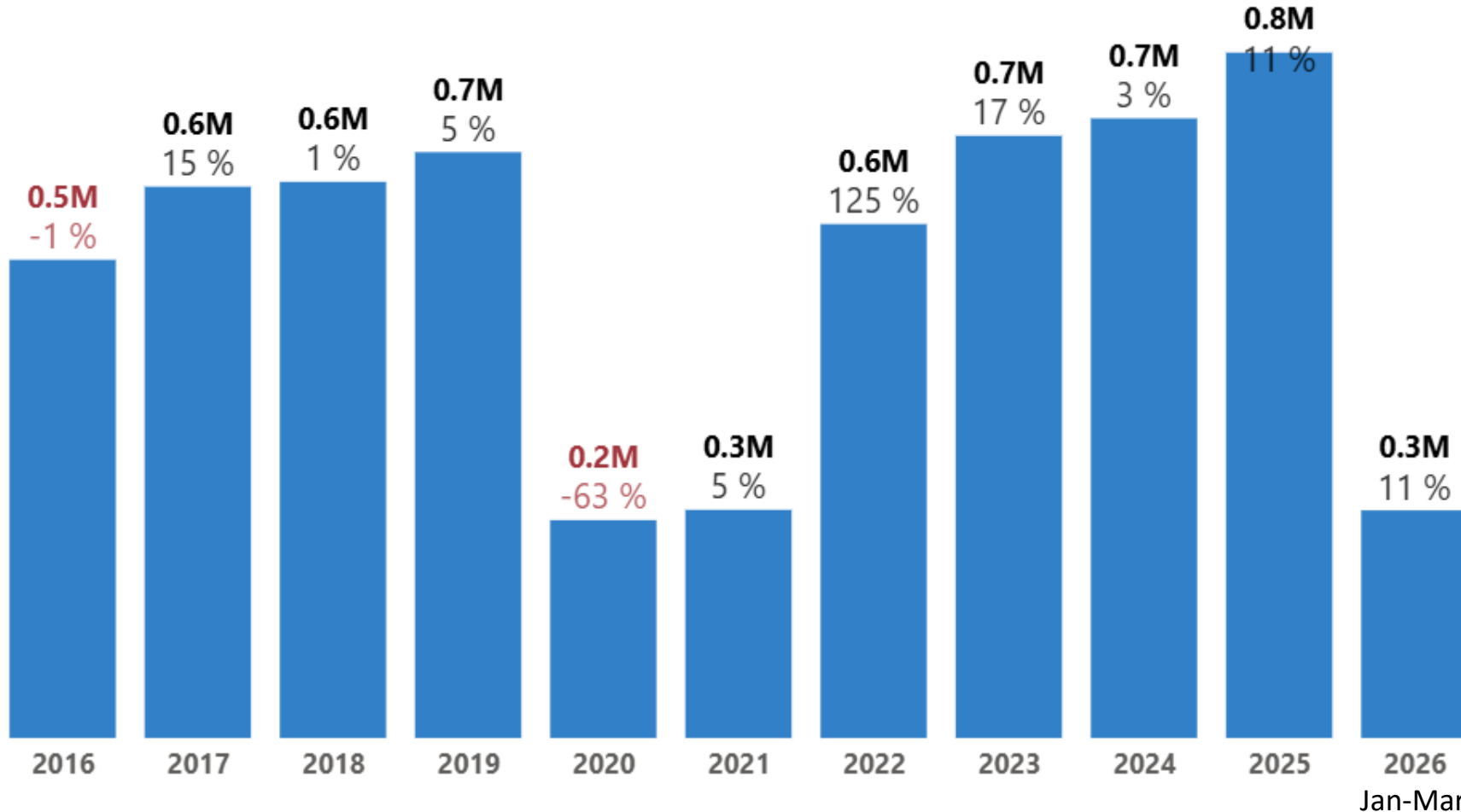
(statistics for short-term rentals 2025 will be published later this year)



German overnights in Finland 2016-2025 & Jan-Mar 2026

NO. OF OVERNIGHTS IN FINLAND AND YoY CHANGE %

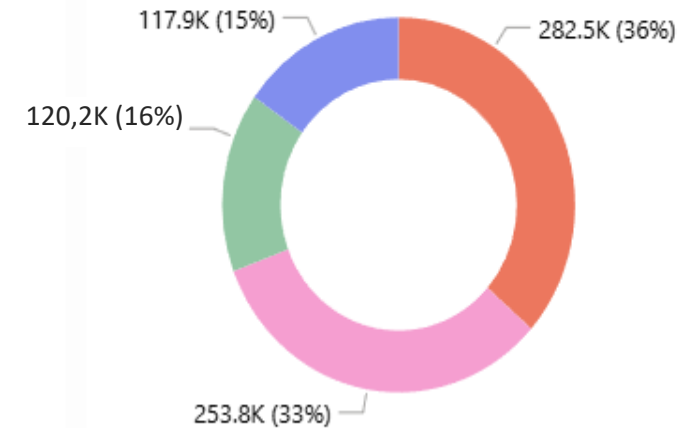
GERMANY



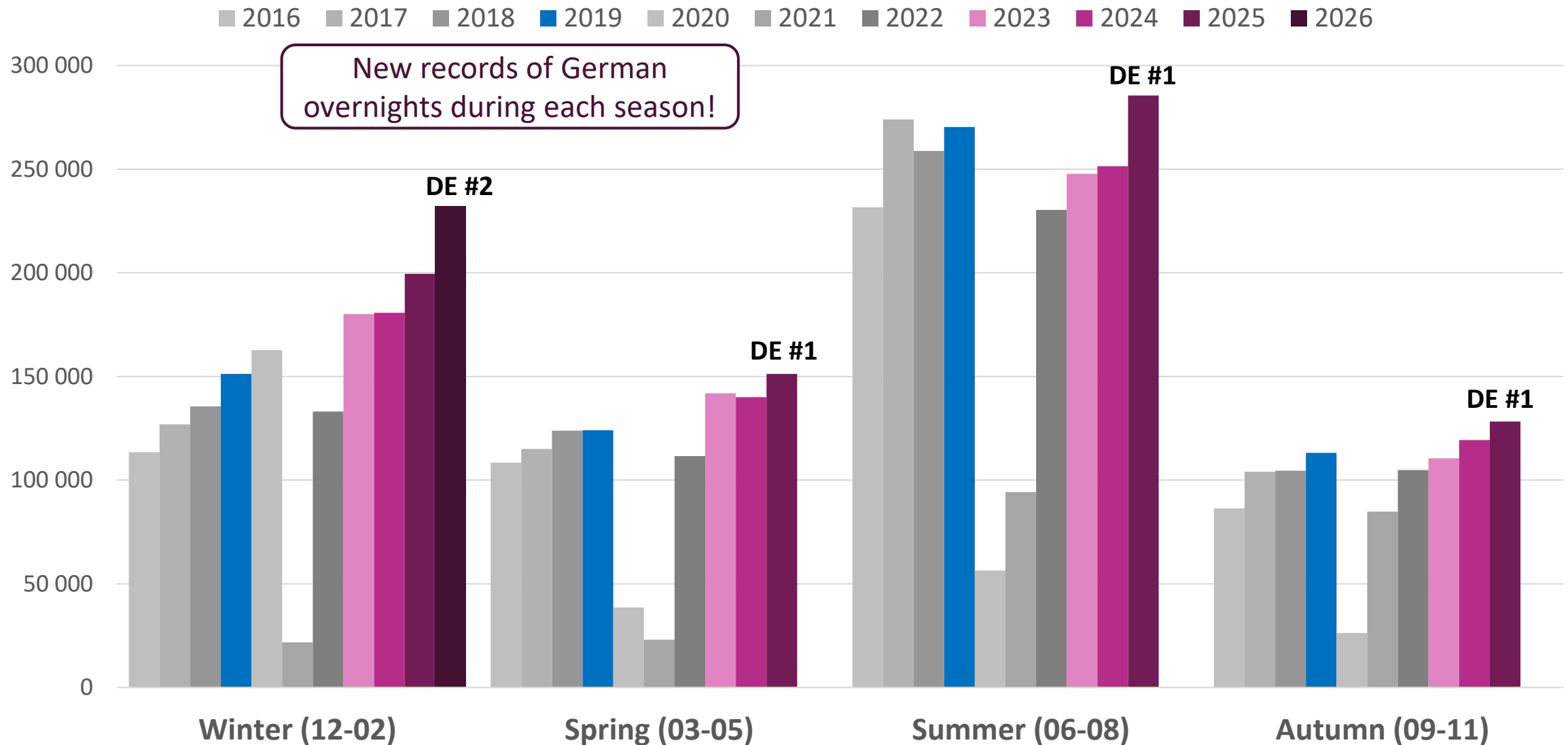
OVERNIGHTS IN MAIN REGIONS

GERMANY - Year 2025

● HELSINKI ... ● LAPLAND ... ● LAKELAND ● COAST & ...



Germany – Seasonal Overnights in Finland 2016-2026

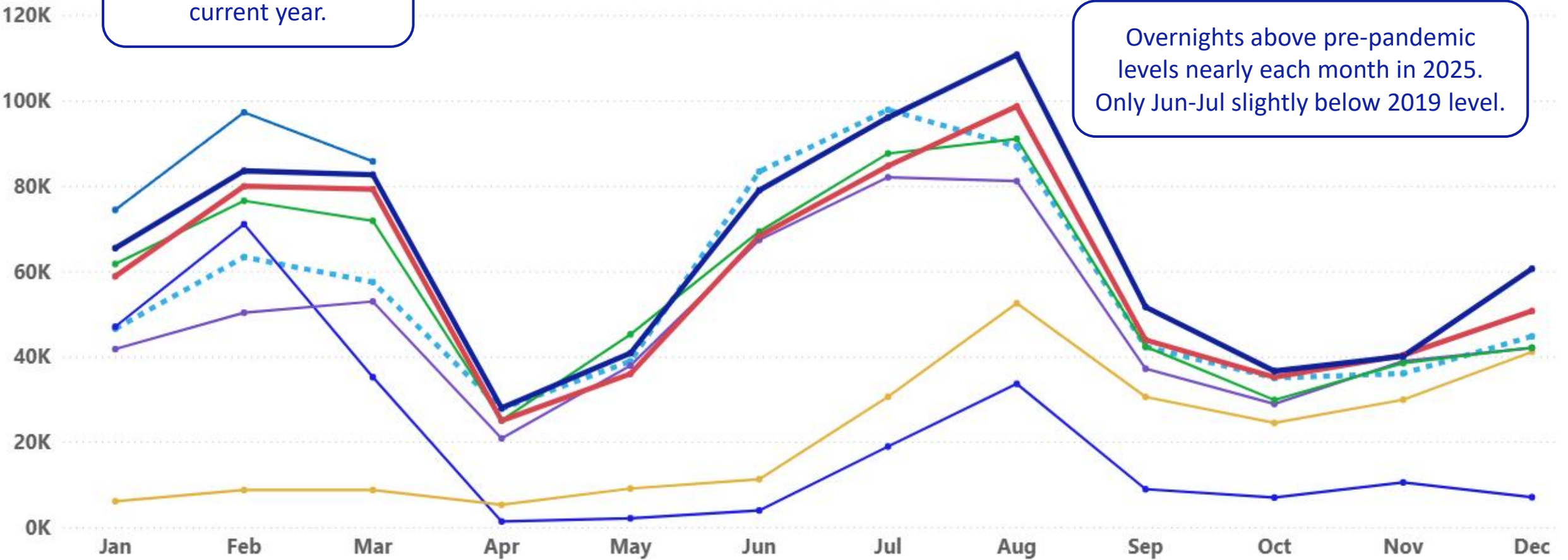


German monthly overnights in Finland 2019–2025 & Jan-Mar 2026

NO. OVERNIGHTS IN FINLAND BY MONTH

GERMANY

● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025 ● 2026



Strong growth continued in the beginning of current year.

Overnights above pre-pandemic levels nearly each month in 2025. Only Jun-Jul slightly below 2019 level.

Overnights in high summer season 2025

And change compared to summer 2024 & pre-pandemic

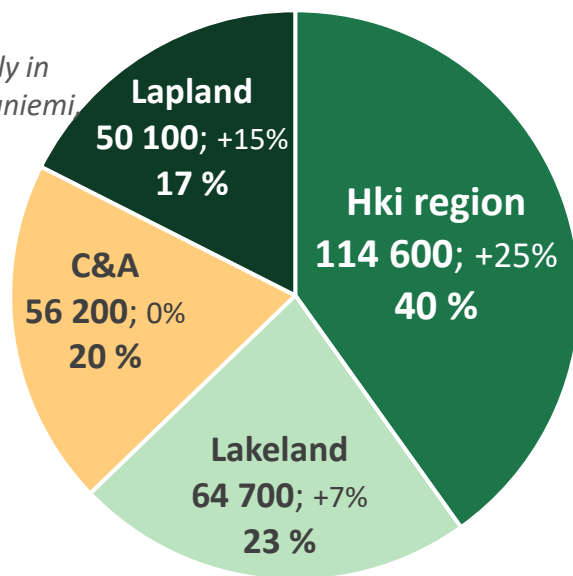
2.1M foreign overnights

(+13% vs. summer 2024 & -5% vs. summer 2019)

- **1.3M** from EU-27 + UK (+14% & +10%)
- **252,500** from Asia (+27% & -27%)
- **236,100** from America (+16% & +48%)

German overnights / summer 2025

Growth especially in Kittilä-Levi, Rovaniemi and Sodankylä



Growth especially in Helsinki

Growth especially in Savonlinna region, Tampere, Kuopio, and Kajaani region

	Jun-Aug 2019	Jun-Aug 2024	Jun-Aug 2025	2025 vs. 2019	2025 vs. 2024
Germany	270 300	251 500	285 500	+5 %	+14 %
Sweden	255 200	242 300	243 800	-5 %	+1 %
USA	109 900	157 900	177 800	+62 %	+13 %
UK	90 800	87 700	111 000	+22 %	+27 %
Italy	68 200	65 600	86 300	+27 %	+32 %
Norway	73 400	76 800	76 000	+4 %	-1 %
France	64 100	61 400	73 000	+14 %	+19 %
Switzerland	64 400	65 200	72 700	+13 %	+12 %
Netherlands	62 300	59 500	67 900	+9 %	+14 %
China & Hong Kong	133 300	47 400	67 600	-49 %	+43 %
Estonia	69 400	59 400	66 000	-5 %	+11 %
Japan	73 100	46 300	63 600	-13 %	+37 %
Spain	56 600	54 800	61 200	+8 %	+12 %
Poland	31 400	38 300	46 100	+47 %	+20 %
Denmark	37 700	36 400	40 000	+6 %	+10 %
Austria	27 900	28 900	34 500	+24 %	+19 %
Australia	27 600	25 800	29 400	+6 %	+14 %
Belgium	21 500	23 400	25 200	+17 %	+8 %
Canada	17 700	19 000	25 100	+42 %	+32 %
India	27 200	19 600	22 600	-17 %	+15 %



Visit Finland

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Foreign overnights in winter high season 2025-2026

And change compared to winters 2024-2025 & (2018-2019)

High winter season (12-02)

2.4M foreign overnights

+6% vs. winter 2024-2025

(**+18%** vs. winter 2018-2019)

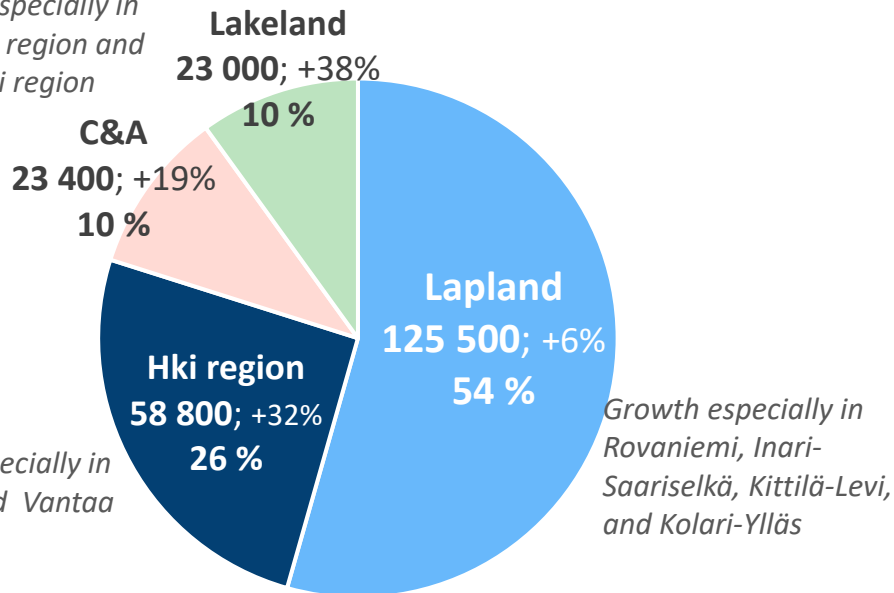
- **1.6M** from EU-27 + UK / **+6%** (+36%)
- **387,200** from Asia / **+8%** (+14%)
- **170,400** from America / **+17%** (+134%)

German overnights / winter 2025-2026

Growth especially in Jyväskylä region and in Kajaani region

Growth especially in Vaasa and Syöte

Growth especially in Helsinki and Vantaa



Growth especially in Rovaniemi, Inari-Saariselkä, Kittilä-Levi, and Kolari-Ylläs

	winter 2019	winter 2025	winter 2026	winter 2026 vs. 2019	winter 2026 vs. 2025
UK	334 900	379 900	404 900	+21 %	+7 %
Germany	151 300	199 400	232 100	+53 %	+16 %
France	161 700	234 000	206 200	+28 %	-12 %
Netherlands	106 700	149 300	142 900	+34 %	-4 %
USA	53 800	103 800	114 700	+113 %	+10 %
China & Hong Kong	139 700	79 500	89 800	-36 %	+13 %
Italy	42 900	74 800	84 000	+96 %	+12 %
Spain	59 400	73 900	82 900	+40 %	+12 %
Australia	32 600	61 200	81 000	+148 %	+33 %
Sweden	75 100	68 500	76 200	+2 %	+11 %
Switzerland	51 800	68 700	70 200	+36 %	+2 %
Belgium	30 300	51 600	61 800	+104 %	+20 %
Japan	49 900	44 600	54 800	+10 %	+23 %
Estonia	58 200	47 200	54 200	-7 %	+14 %
Singapore	35 300	58 400	49 700	+41 %	-15 %
Taiwan	11 000	24 800	38 500	+252 %	+55 %
Ireland	14 900	32 700	37 400	+151 %	+14 %
India	19 000	37 500	36 600	+92 %	-3 %
Poland	21 900	31 900	33 600	+53 %	+5 %
Denmark	21 200	27 000	33 100	+56 %	+23 %

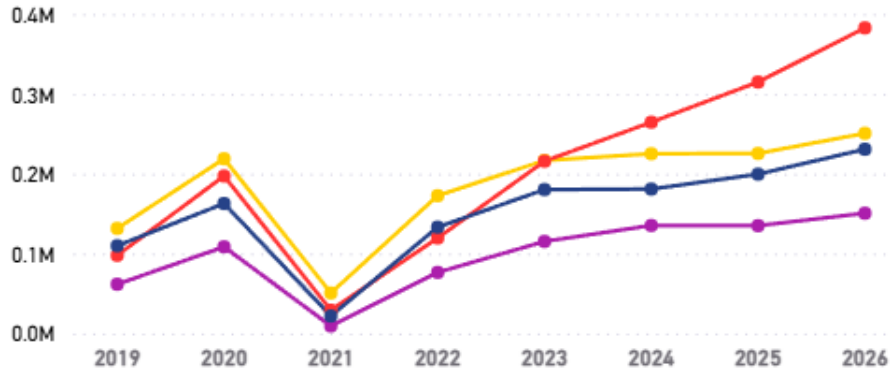
Winter & summer high seasons: German registered overnights in the Nordics



Winter (Dec-Feb)

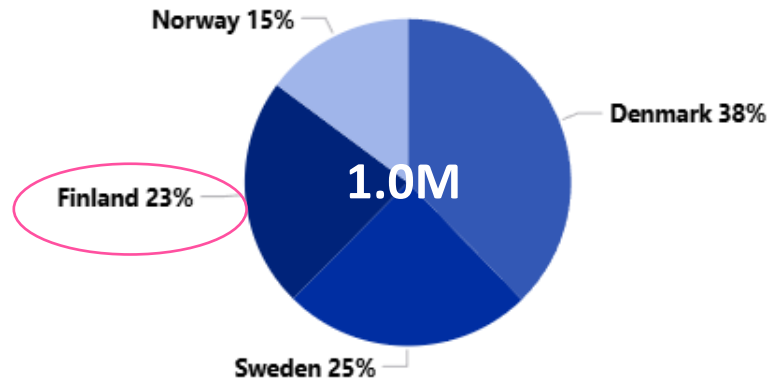
WHOLE COUNTRY Foreign Germany

Sweden Denmark Norway Finland



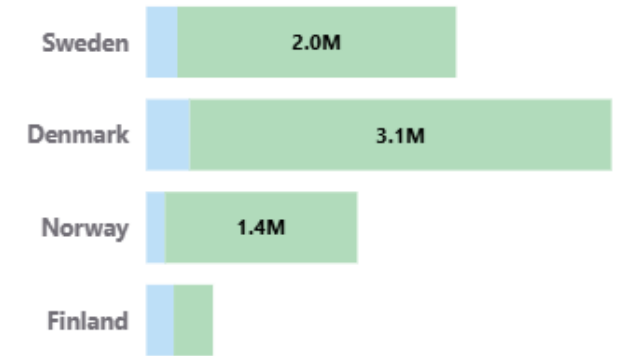
Share of overnights - winter (Dec-Feb)

2026



Overnights in winter & summer

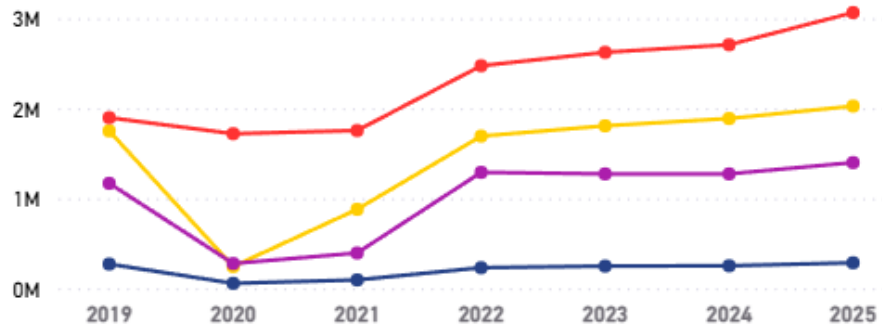
WHOLE COUNTRY Foreign Germany 2025



Summer (Jun-Aug)

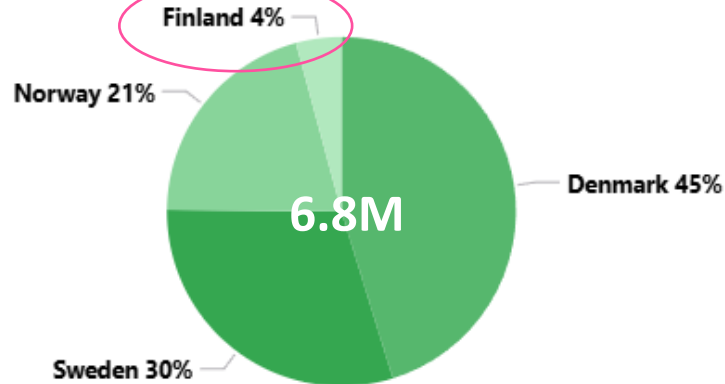
WHOLE COUNTRY Foreign Germany

Sweden Denmark Norway Finland



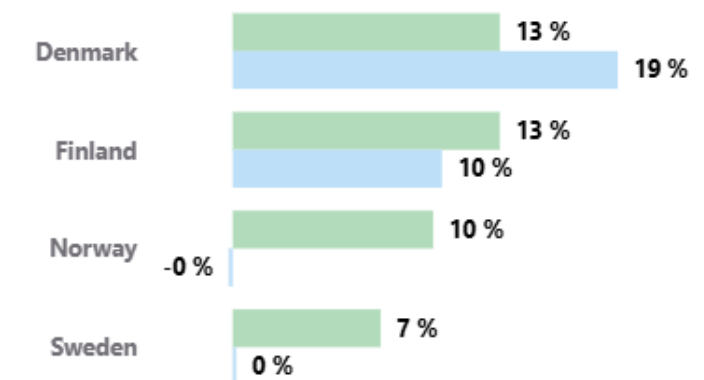
Share of overnights - summer (Jun-Aug)

2025



YoY change in seasonal overnights %

WHOLE COUNTRY Foreign Germany 2025





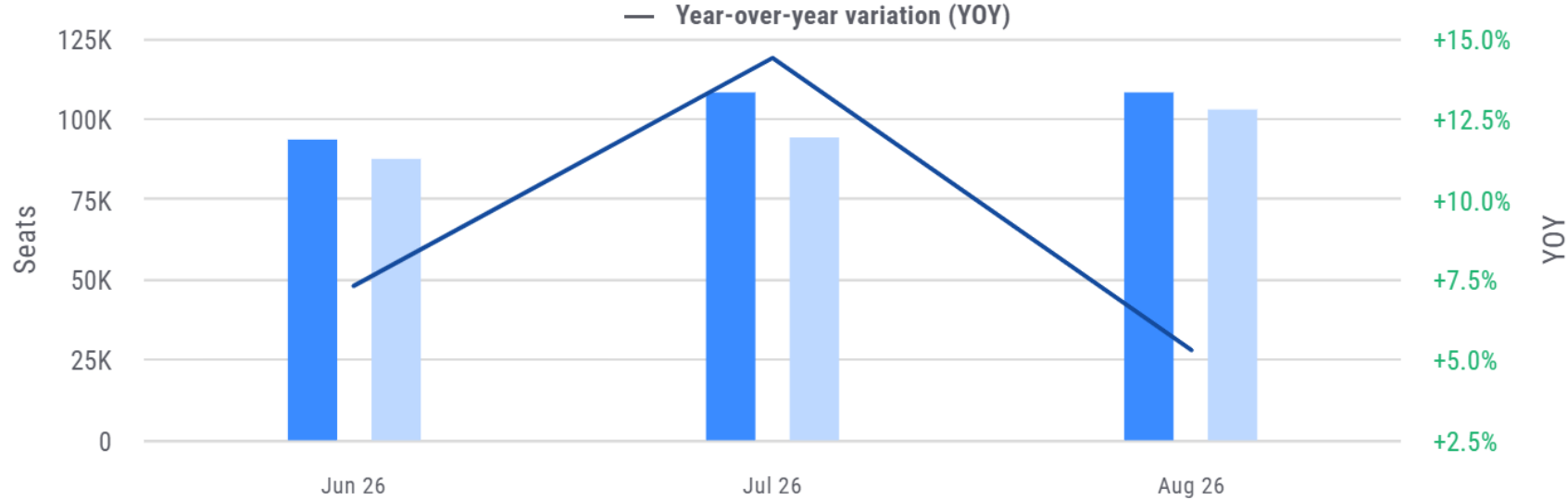
Amadeus/Destination Gateway

**Seat capacity &
forecast for
Flight arrivals during
Jun-Aug 2026**

Seat capacity from Germany to Finland in Jun – Aug 2026

Comparison to previous summer

■ Current period
■ Previous year

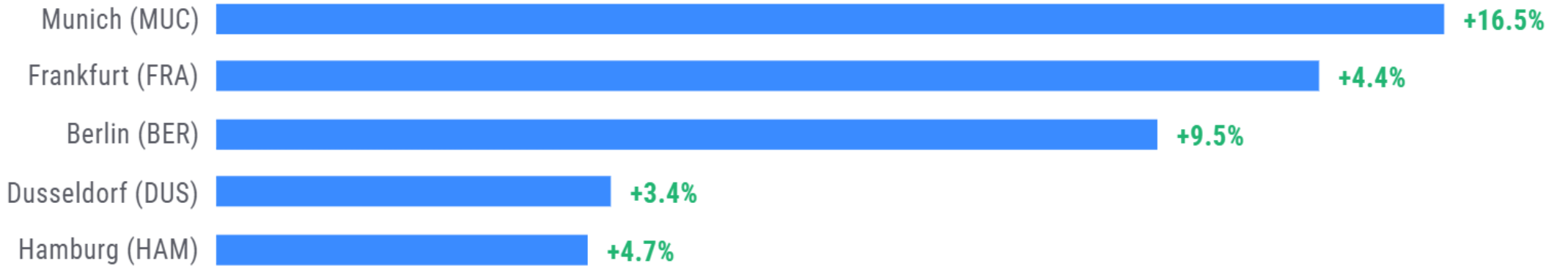


The number of seats available from **Germany to Finland** is **increasing** each month during the high summer season compared to last year.

The number of seats available from each of the German origin cities to Finland is increasing, with biggest growth rates from **Munich** and **Berlin**.

309,499
seats
+9.0% vs. Previous year

141
weekly flights on average
+5 vs. Previous year

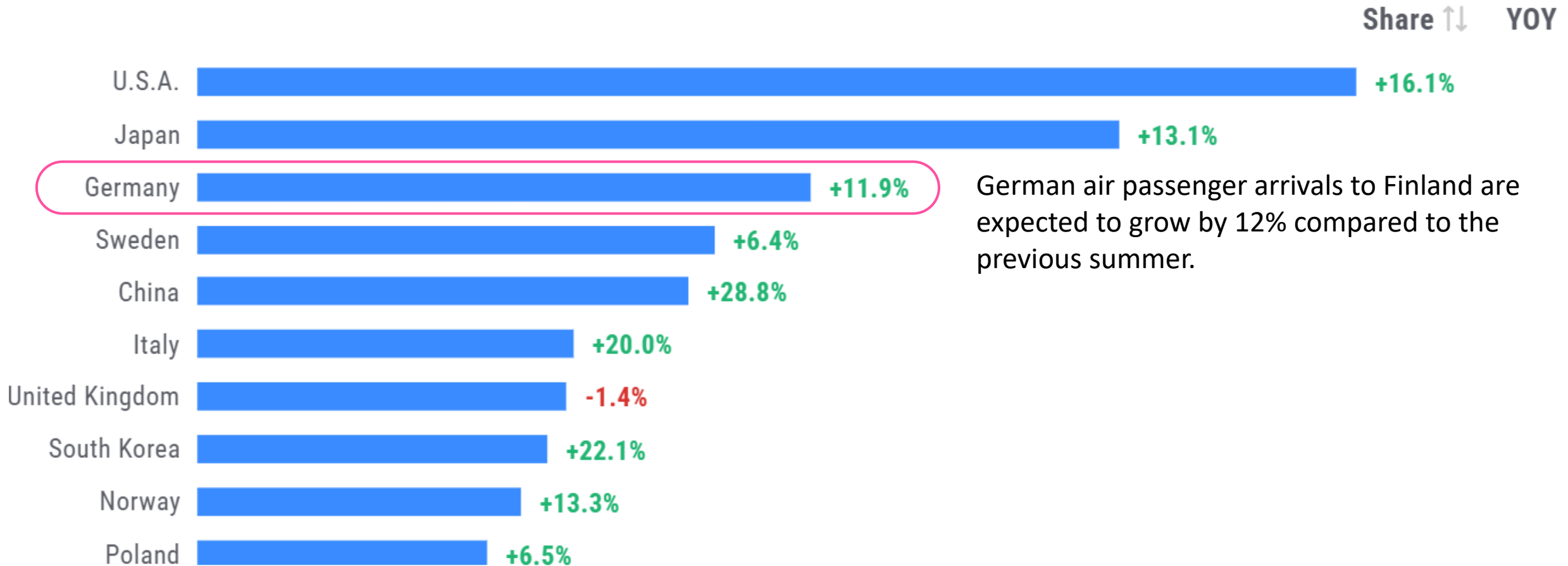


Forecast for Flight Passenger arrivals in June – August 2026

Comparison to previous summer

583,372 tourist arrivals

+13.1% YOY



German air passenger arrivals to Finland are expected to grow by 12% compared to the previous summer.

Short introduction joint promotions

Joint promotions 2026



Visit Finland

**WOW-MOMENTE
IN FINNLAND**

RUNDREISE RSF013

FINNLAND
Mit der Bahn durch Städte
voller Design und Weite

- 7-tägig inkl. Flüge
- 4-Sterne-Hotels mit Frühstück
- Inkl. Ausflüge und Eintritte i. W. v. 100 € p. P.

August — Oktober 2026

~~1.899 €~~
ab 1.799 €
pro Person

ZUM ANGEBOT

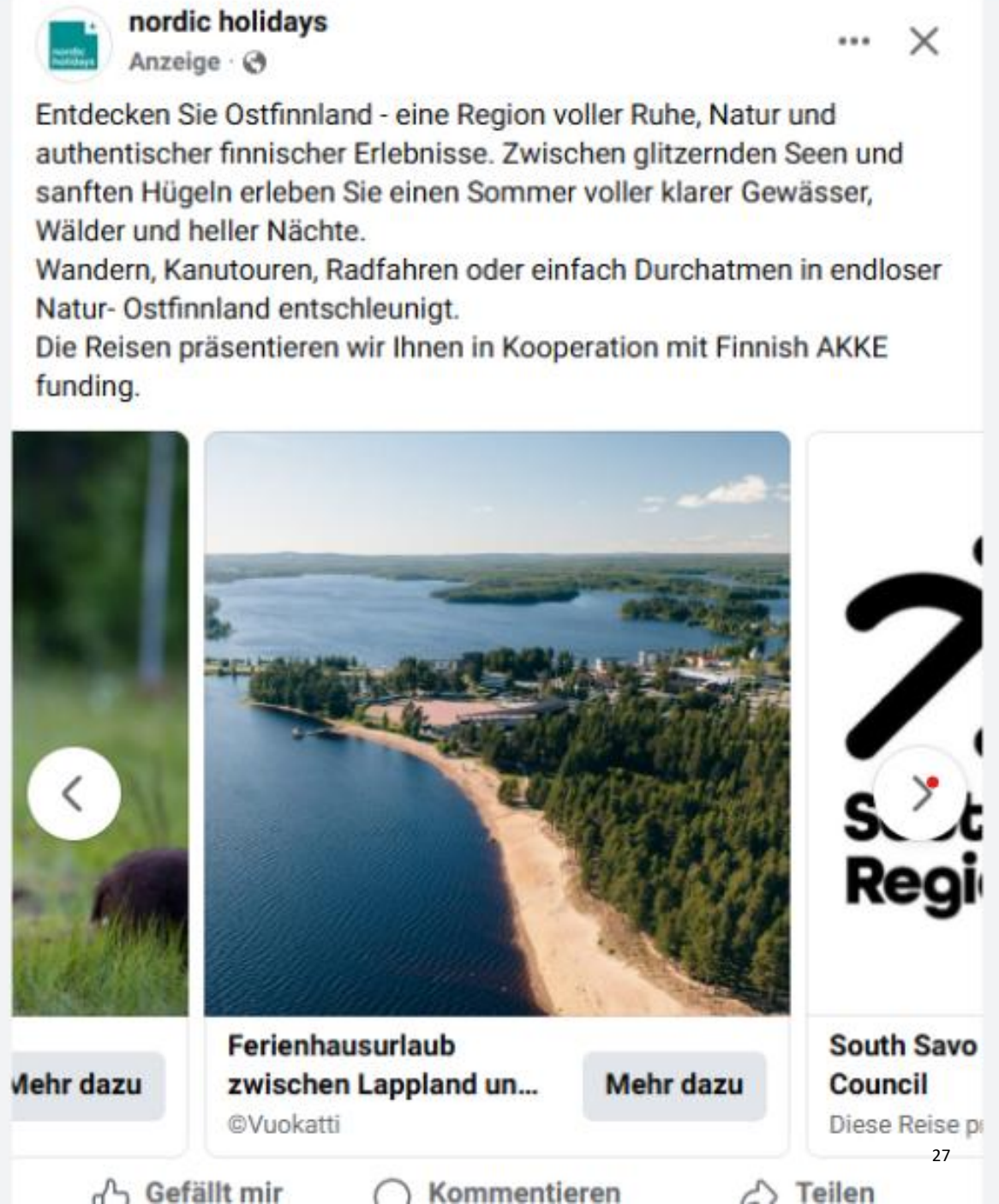
- AER & Finnair
- Berge & Meer
- DERTOUR
- Discover airlines x Visit Levi
- Saimaa Cycle Tour x GCN
- Holiday Check
- Nordic Holidays
- Northbound x Saimaa DMOs
- TUI Nederland x Arctic Lakeland
- Deuter x Journaway x Visit Levi
- Wikinger Reisen
- Air Baltic Kuusamo Area


Joint promotions. How does it work?

Tour Operators suggests marketing activities to promote products to Finland – marketing plan:


articles and advertorials in big magazines and newspapers like DIE ZEIT, Hamburger Abendblatt, SoMe

50:50 financing



nordic holidays
Anzeige · 




Entdecken Sie Ostfinland - eine Region voller Ruhe, Natur und authentischer finnischer Erlebnisse. Zwischen glitzernden Seen und sanften Hügeln erleben Sie einen Sommer voller klarer Gewässer, Wälder und heller Nächte.
Wandern, Kanutouren, Radfahren oder einfach Durchatmen in endloser Natur- Ostfinland entschleunigt.
Die Reisen präsentieren wir Ihnen in Kooperation mit Finnish AKKE funding.



Ferienhausurlaub zwischen Lappland un...
©Vuokatti

South Savo Council
Diese Reise p...

Mehr dazu **Mehr dazu**

 **Gefällt mir**  **Kommentieren**  **Teilen**



Reiseziele

Rundreisen

Kreuzfahrten

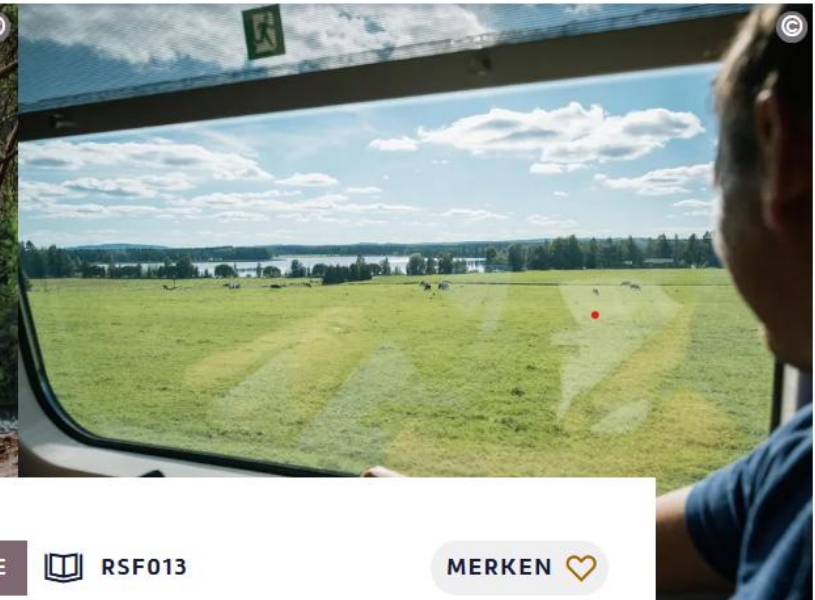
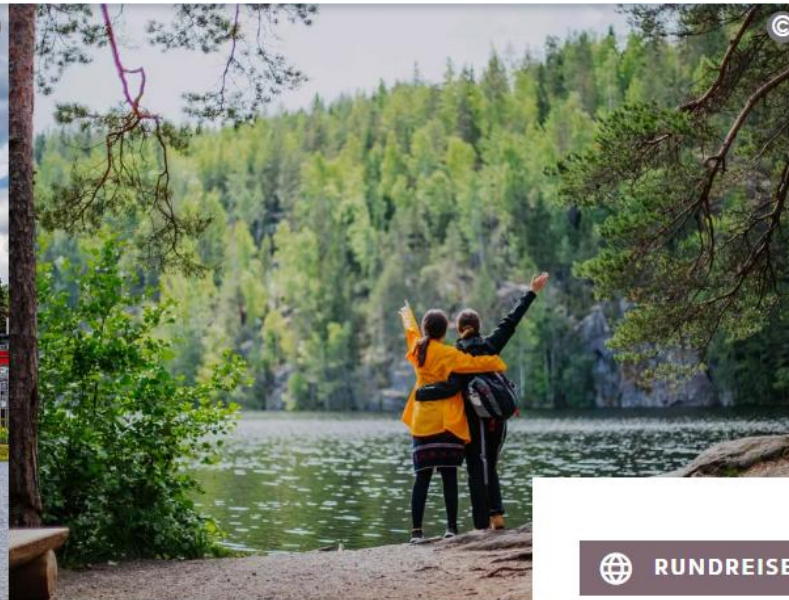
Mehr Reiseideen

% Deals

Suche



Berge & Meer > Suchergebnisse > Mit der Bahn durch Städte voller Design und Weite



RUNDREISE

RSF013

MERKEN

FINNLAND

Mit der Bahn durch Städte voller Design



OTA campaigns 2026



Campaign formats:

campaigns on DACH market with DMO partner – TravelZoo campaign with Ylläs and Levi

multi market campaign with Helsinki, Tampere, Turku – eDreams Odigeo (UK, FR, DACH)

Smaller campaign with no partner – Escapio hotel recommendation platform for special, beautiful hotels

PR 2026

average 2026

ten: Zehn Menschen erkunden die Grenzen des in Finnland

Wahrnehmungsweltlichen zehn-Menschen erkunden die Grenzen des Körpers in Finnland a 0 1027468

2 SPIEGEL



SPiegel
ONLINE

stenlosen Urlaub



t-online.

as Herosch die Jahr's Ereignis mit mehr als 50.000 Besu (Quelle: MANGO-Duane.com/Fotok-Bestand)

land

Frankfurter Allgemeine
ZEITUNG FÜR DEUTSCHLAND

Freizeitspa

Von wegen nordische wie man bei minus 25 Grad



reisen
EXCLUSIV



IN FINNLAND IST REDEN IN DER SAUNA ERLAUBT. DAS FINDE ICH SUPER. MACHT ES SO GESELLIG. LEIDER

VERSTEHE ICH JA NICHTS. 😊

Frank Störbrauch

In Finnland ist das Schwitzen kein Zufall, sondern eine Lebenseinstellung. Wer sich bei 90 Grad in die Holzhütte setzt, merkt schnell: Wahre Gelassenheit entsteht genau dort, wo die Poren kapitulieren. In der Hitze lässt sich wunderbar herausfinden, dass »sich finden« manchmal bedeutet, erst einmal ordentlich Dampf abzulassen. Das ist die pure, ungeschönte Form der Entspannung, bei der am Ende nur ein Handtuch und die absolute Ruhe übrig bleiben.

Interview

»Di

Von Ti

Finnland-
degen,
fleisch
ablassen
ten. Von
Flutene



© Finns

Für die
ihren 30
verfüge
sind die
»Apus-
gier zu
Turkku
ordnen

PR agency and PR colleague (Eevakaisa Mölsä)

Several articles, at least 4 press releases a year

Help with our happiness exhibition

Influencer trips

Influencer events (food, happiness, lifestyle)

Press trips

PR work

Coverage 2026 DIE RHEINPFALZ

RHEINPFALZ AM SONNTAG
31./32. MÄRZ 2026

REISE
SEITE 17

Edelsteine im Salatsieb

In Fylik-Lands in Nordfinland finden Kinder in einer Aarefjell Mine ihr Glück. Von Geraldine Friedrich

Min der Nord-Side von Finnland, im nördlichen Teil des Landes, am Älvsjöen, gibt es eine kleine, aber sehr interessante Mine. In der Aarefjell Mine finden Kinder Edelsteine im Salatsieb. Die Edelsteine sind in Form von kleinen, farbigen Kristallen, die in einem Salatsieb gesiebt werden. Die Edelsteine sind in Form von kleinen, farbigen Kristallen, die in einem Salatsieb gesiebt werden. Die Edelsteine sind in Form von kleinen, farbigen Kristallen, die in einem Salatsieb gesiebt werden.



SCHÖNWEINER
Tafelkäsche in der Aarefjell Mine in Nordfinland. Die Edelsteine sind in Form von kleinen, farbigen Kristallen, die in einem Salatsieb gesiebt werden.

Reise genuss



OULU / FINNLAND Kulturhauptstadt Europas 2026

Im hohen Norden bereitet sich die finnische Stadt Oulu auf ein außergewöhnliches Jahr vor: 2026 wird Oulu zur Europäischen Kulturhauptstadt – und feiert diesen Titel mit über 1000 Veranstaltungen, die Besucherinnen und Besucher einladen, die Kultur in einer der spektakulärsten Landschaften Europas zu entdecken: von einer Sámi-Opfer, die erstmals auf eine große Bühne kommt, bis hin zu einem Techno- und Kunstfestival auf dem zugefrorenen Meer, an dessen Rand eine Sauna aus Eis zum Aufwärmen lockt. Den Auftakt zum Jahresanfang machen winterliche Höhepunkte: Schneeskulpturen, Eischwimmern, elektronische Musik und Lichtkunst – alles auf und rund um das gefrorene Meer. Im Sommer bestimmen dann Begrenzungen, Kulinarik und Musik das Programm. Mit Oulu erhaben die Sámi – die indigene Bevölkerung Nordeuropas – zum ersten Mal eine große Opernbühne. Die Uraufführung am Oulu Theatre vereint samische Musikinstrumente und Ländler sowie traditionelle Jokk-Gesänge, die selten in Finnlands Theatern zu erleben sind.

FINNLAND
Anreise: Der Flug von Berlin nach Helsinki dauert nur 2 Stunden und kostet ab 99 Euro. Ein Mietwagen ist ebenfalls verfügbar.
Unternehmen: Finnland, ein wunderschönes Land in Europa, ist ein ideales Reiseziel für alle, die nach Abenteuer und Natur suchen.
Aktivitäten: Entdecke die Schönheit der finnischen Landschaft, besuche die Aarefjell Mine und genieße die Sauna aus Eis.
Neues für die Frau: Ein neues Restaurant in Helsinki bietet eine einzigartige kulinarische Erfahrung.



Neues für die Frau

Ein neues Restaurant in Helsinki bietet eine einzigartige kulinarische Erfahrung. Das Restaurant ist ein perfektes Beispiel für die finnische Küche, die sich auf frische Zutaten und traditionelle Rezepte konzentriert. Die Küche ist ein perfektes Beispiel für die finnische Küche, die sich auf frische Zutaten und traditionelle Rezepte konzentriert.

ELLE tRavel & food

Eine atemberaubende Ausstellung in Berlin zeigt, für viele Finnen beginnt die Zubereitung mit der Nähe zur Natur.



Seit neun Jahren ist niemand glücklicher als die FINNEN. Ab 2027 lüftet das neue „Happiness Experience Museum“ in Helsinki ihr GEHEIMNIS.



2027 planning

Activity plan 2027

SALES PROMOTION

Sales Events

- ITB, 16.-18.3.2027
- Nordic Workshop xx.9.2027 tbc
- ITSE sales events

FAMS

- Joint fam trips: euro markets
- VF budget, ITSE budget

Joint promotions

- Joint promotions on 50-50 funding basis
- X over campaigns with aligning brands
 - > to boost awareness and increase sales

MARKETING & PR

B2C Campaigns

- ITSE campaign, tbc
- Food promotion, tbc

PR

- TBC

Biannual market reports and upcoming webinars

- Biannual market reports published: <https://www.visitfinland.fi/toiminta-markkinoilla/>
- Spring market webinars: <https://www.visitfinland.fi/ajankohtaiset/seminaarien-satoa/>

