



Visit Finland

Study on the attractiveness of Finland as a destination for tourism and food tourism in 2025

Visit Finland

nepa

Image: Julia Kivelä / Visit Finland

Background and objectives of the project

Overall target

The aim of the food tourism cooperation project is to strengthen Finland's attractiveness as a food tourism destination and to increase awareness of and interest in Finnish food.

Objectives of the research entity

The main objective of the research entity is to produce information to support the planning of Visit Finland's image marketing. The conclusions and recommendations of the study must provide input for the planning of the marketing campaign's concept and messages, for example, by mapping Finland's strengths and potential arguments to make food tourism more attractive, and by identifying how to connect with different tourism segments. In addition, the research results must be clear and easy to use in the planning activities by a wide range of stakeholders.

Image study

To evaluate the attractiveness of Finland as a destination for tourism and food tourism (also acting as a baseline measure for monitoring attractiveness) and to identify opportunities for strengthening Finland's culinary image and standing out from competitors. In addition, we will investigate which images resonate with different tourism segments.

The image study is divided into three parts

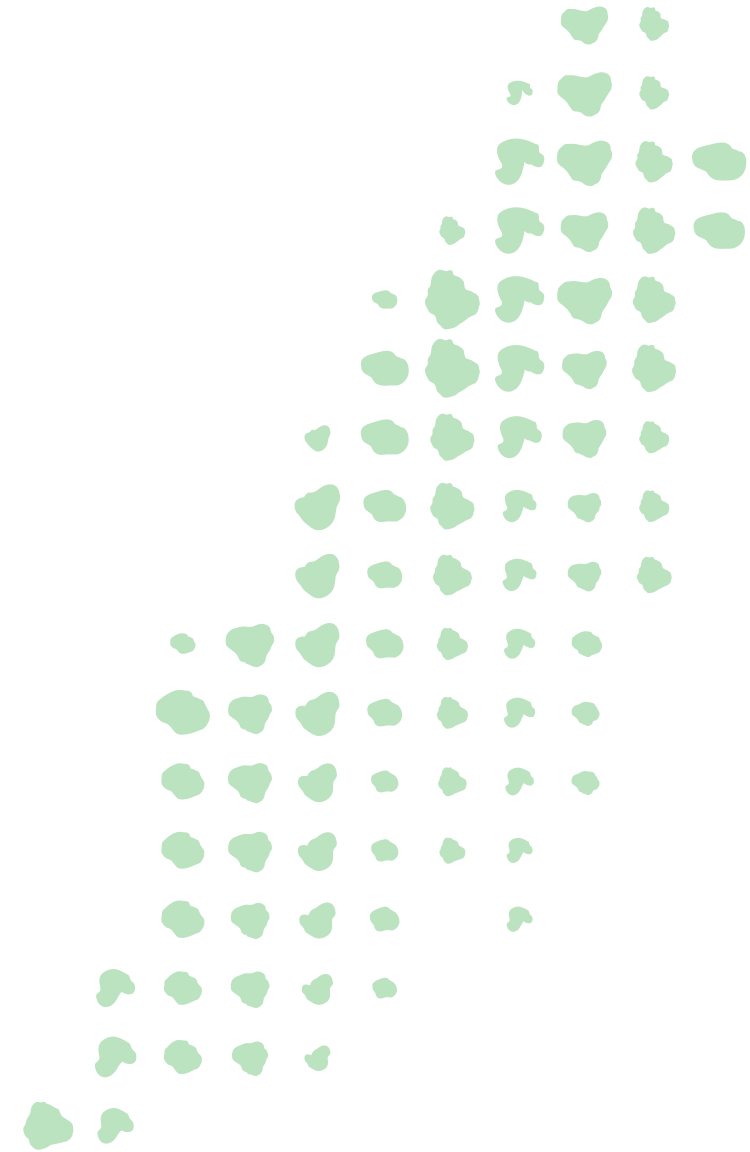
Image study

To evaluate the attractiveness of Finland as a destination for tourism and food tourism (also acting as a baseline measure for monitoring attractiveness) and to identify opportunities for strengthening Finland's culinary image and standing out from competitors. In addition, we will investigate which images resonate with different tourism segments.

- 1) **Finland's image as a travel destination:** How interesting is Finland as a travel destination in general and according to different travel goals, and what is the role of food tourism in the context of tourism as a whole compared to other Nordic countries?
- 2) **Finland as a food tourism destination:** What is Finland's current image as a food tourism destination and how does the reputation of Finnish food affect it? How can they be developed to attract travellers?
- 3) Deepening knowledge of **tourism target groups** with food-related information: What are the food-related expectations of different traveller segments?

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Background of the study

Survey data

Markets: Germany, Spain, France, USA, Japan

- Spain, France, Japan: national
- Germany: West Germany and Berlin
- USA: California, Texas, New York, Massachusetts and Illinois

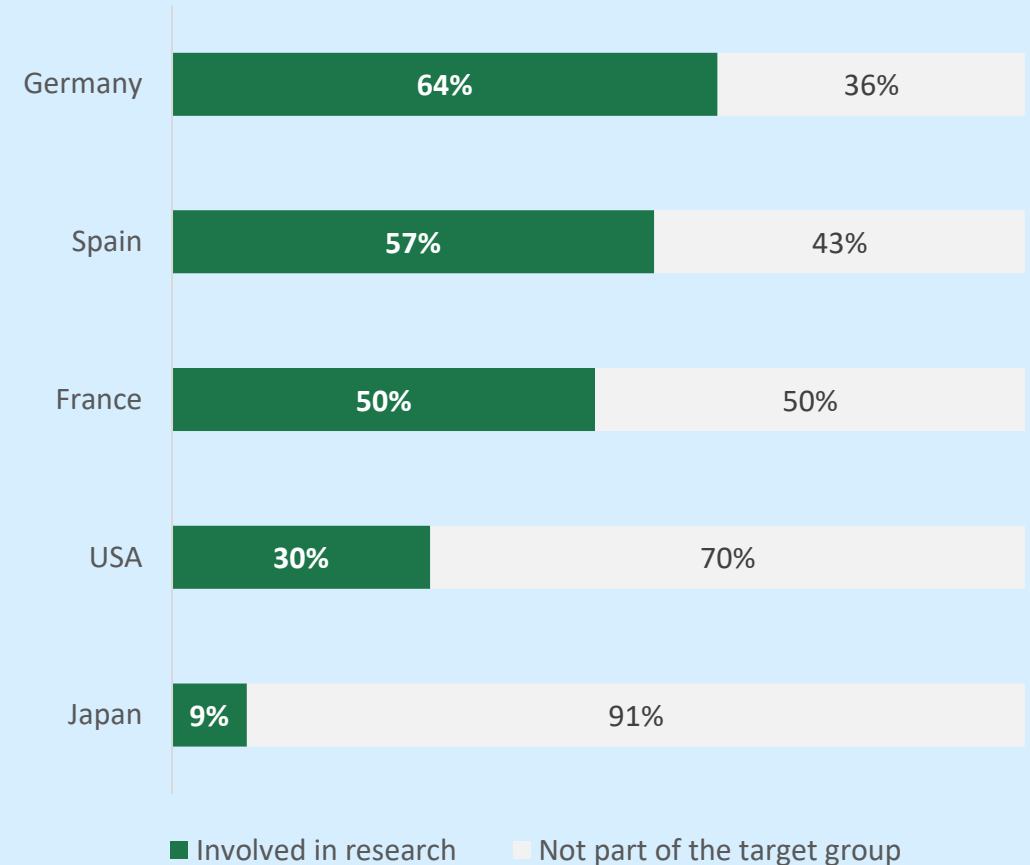
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

Data collection period: 3 July – 30 July 2025

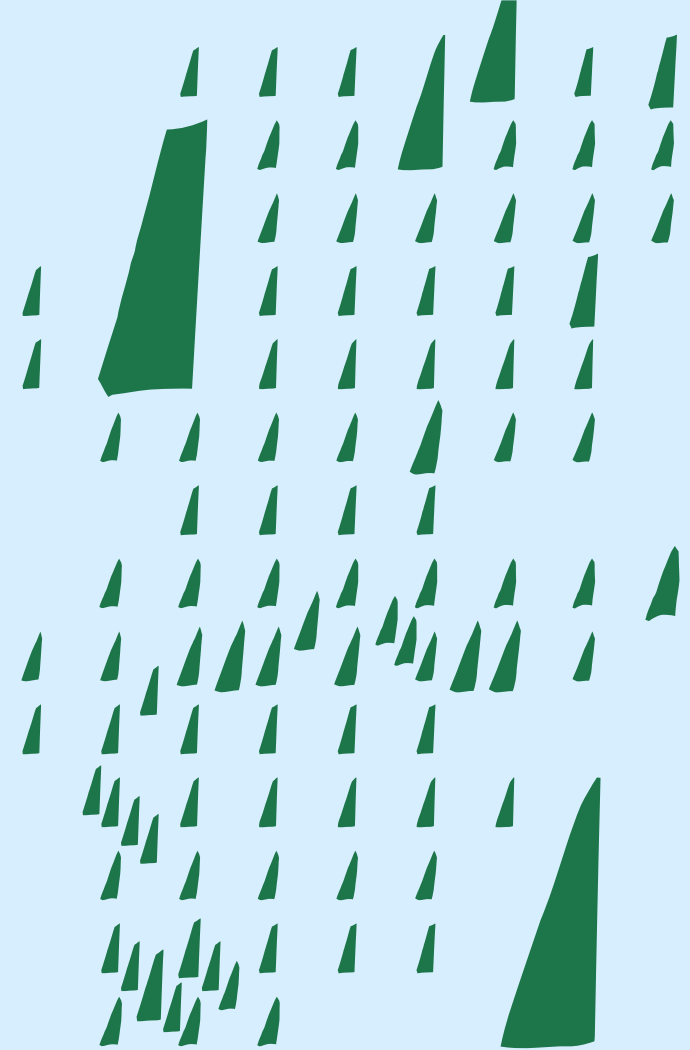
Research method: Quantitative online survey

Sample size: Germany 1,020 IP, Spain 1,009 IP, France 1,026 IP, USA 1,002 IP, Japan 1,003 IP
(IP = number of respondents, interviewed persons)

Plans a leisure trip in the next three years



COUNTRY COMPARISON REPORT



1. Finland's image as a travel destination:

How interesting is Finland as a travel destination in general, and what is the role of food tourism in the context of tourism as a whole?

Awareness and attractiveness of the Nordic countries

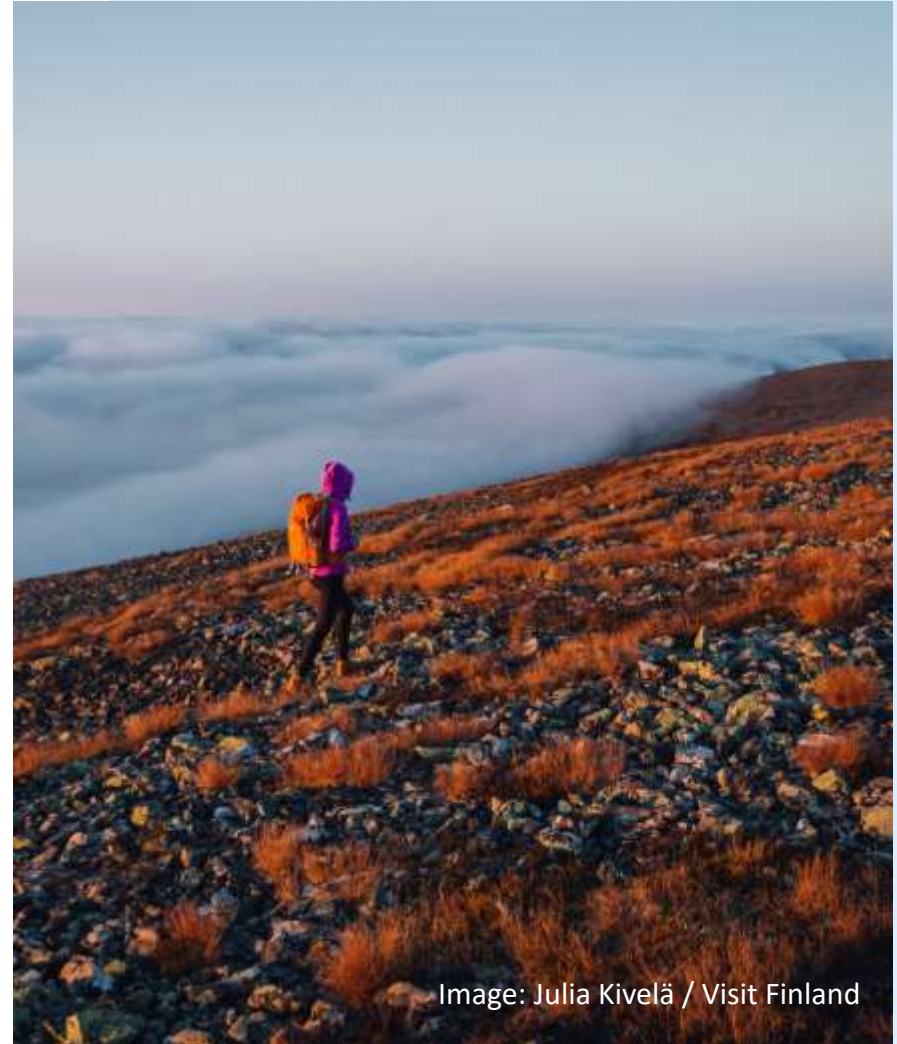
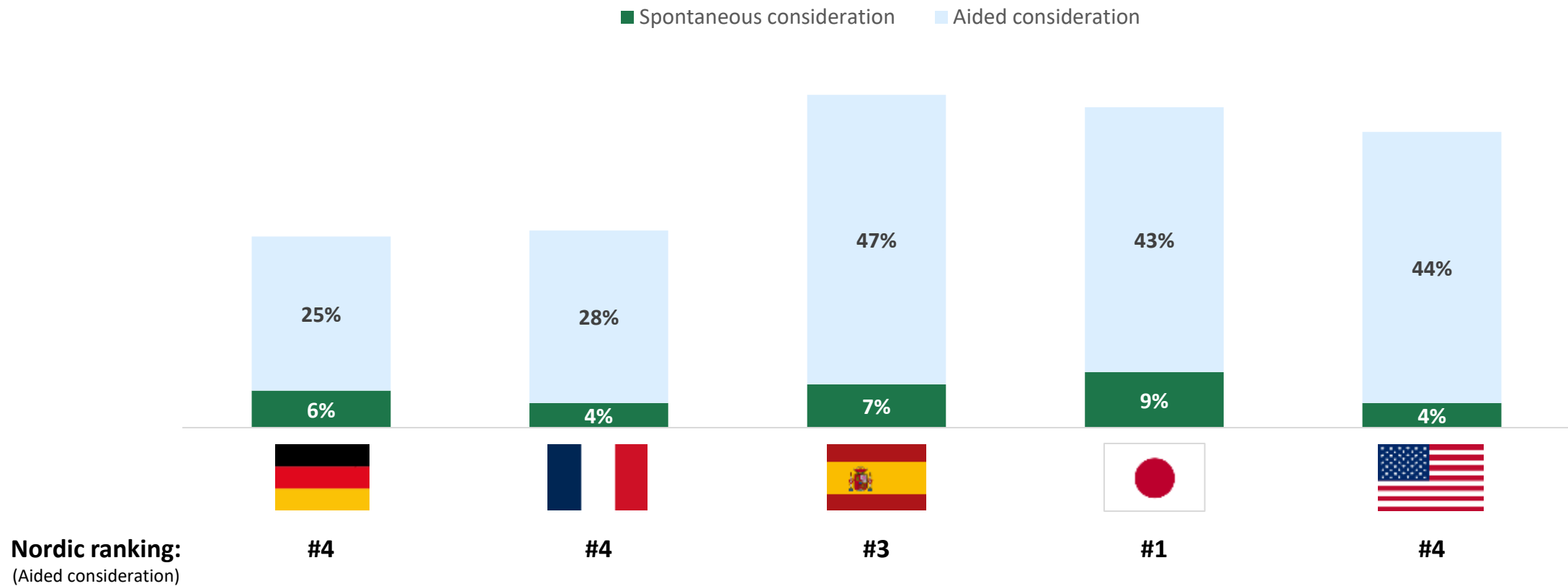


Image: Julia Kivelä / Visit Finland

Finland is considered most often as a holiday destination by residents of Spain, Japan and the United States planning a holiday.

Finland's spontaneous and aided consideration



Q: Think of Europe. Which European countries would you consider for a holiday or short trip in the next three years? (Open)
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 in the next three years 5,060 IP

The countries that are most often considered spontaneously are Italy, Spain, France, Greece, Portugal and the United Kingdom. Varying by market, Finland's ranking is the highest in Japan.

Spontaneous consideration



Top 5 countries considered spontaneously most often:

Italy	Italy	Italy	Italy	Italy
Spain	Spain	France	France	France
France	Portugal	Greece	Spain	Spain
Greece	Greece	Portugal	United Kingdom	United Kingdom
Portugal	United Kingdom	United Kingdom	Switzerland	Germany



Spontaneous reflection of Finland is on a similar level to:

Ireland	Iceland	Iceland	Netherlands	Poland
Iceland	France	Denmark	Austria	Belgium
Poland	Denmark	Belgium	Greece	Denmark
Turkey	Poland	Poland	Belgium	Paris
Belgium	Albania	Spain	Croatia	London



Spontaneous consideration of Finland:

6%	4%	7%	9%	4%
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Finland's ranking in spontaneous consideration:

17th	19th	14th	11th	21st
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In the United States, cities are also mentioned spontaneously.

Spain and France are the most popular European destinations in the surveyed market. Germany, the UK and Switzerland also outperform the Nordic countries on average.

Aided consideration

						Average
Spain	1	1	2	1	1	71%
France	3	2	1	2	2	67%
Germany	2	9	3	3	5	55%
UK	9	3	5	4	3	53%
Switzerland	7	4	4	5	4	55%
Norway	5	6	6	9	8	46%
Ireland	10	5	7	13	6	45%
Sweden	6	8	9	8	7	47%
Austria	4	12	8	6	11	38%
Denmark	8	10	12	10	10	41%
Iceland	11	7	10	12	9	45%
Finland	12	11	11	7	12	37%
Poland	13	13	13	11	13	28%
Slovenia	14	14	14	16	14	21%
Estonia	15	15	15	15	16	17%
Lithuania	17	17	16	14	15	18%
Latvia	16	16	17	17	17	15%

On average, respondents consider **7** different countries from this predefined list.

Finland is considered significantly more often than the Baltic countries, Poland and Slovenia, but less often than the other Nordic countries.

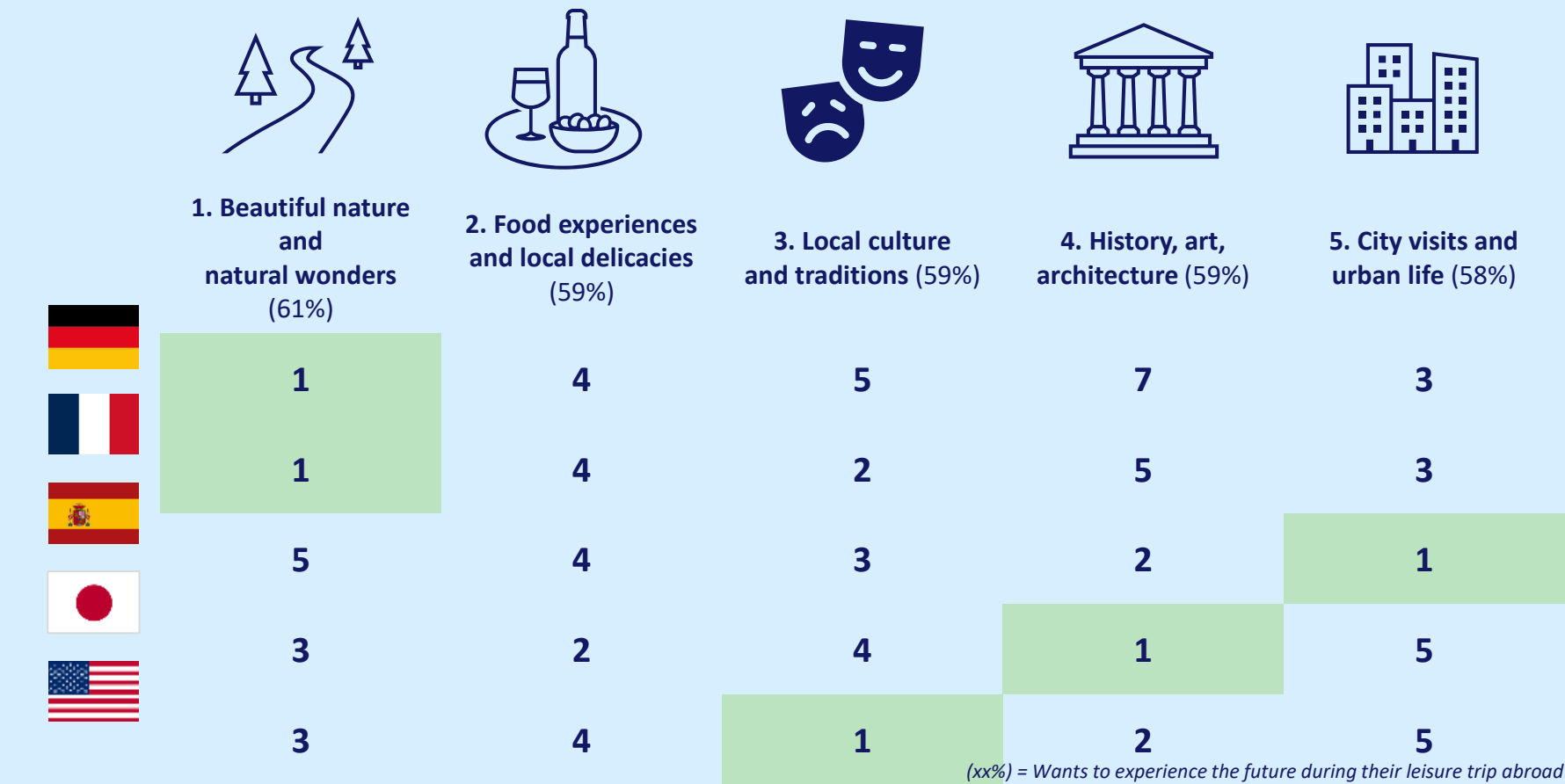
Travel themes and country images



Image: Elina Manninen / Visit Finland

Beautiful nature, food experiences, local culture, history and city visits are the most interesting travel themes globally.

Travel themes: ranking of top themes by market

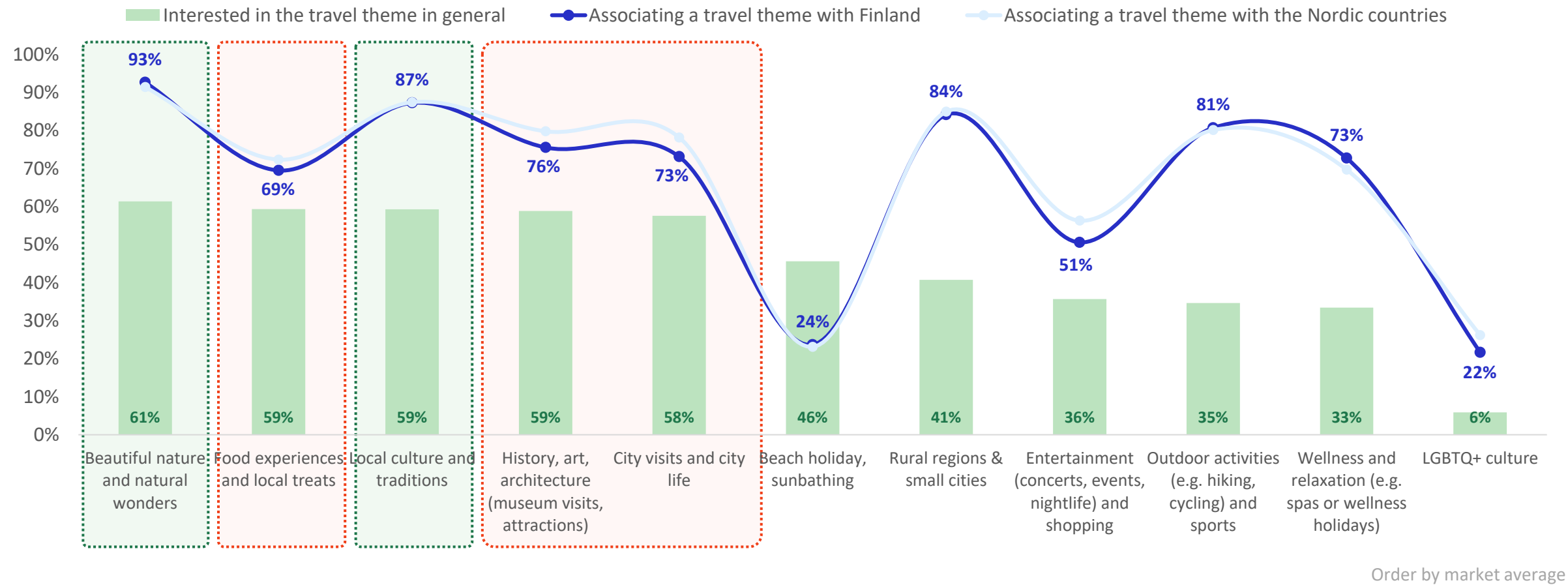


Differences between markets:

Germans are more interested in beach holidays and less interested in history and art. **Japanese and Americans** are less interested in entertainment and urban life than others.

The most interesting travel themes associated with Finland are nature and local culture . History, city visits and food experiences are associated with Finland relatively often, but slightly regularly than for the Nordic countries on average.

Interest in travel themes and association with Finland



Country image: Nordic countries



Image: Harri Tarvainen / Visit Finland

The images most strongly associated with Finland in all the markets surveyed are the Northern Lights, beautiful nature and clean air and the environment.

Country image, Finland



1. Northern Lights
(59%)



2. Beautiful nature
(e.g. Arctic wilderness, midnight sun) (57%)



3. Clean air and environment (53%)



4. Sauna culture (44%)



5. Interesting Nordic culture and way of life (43%)



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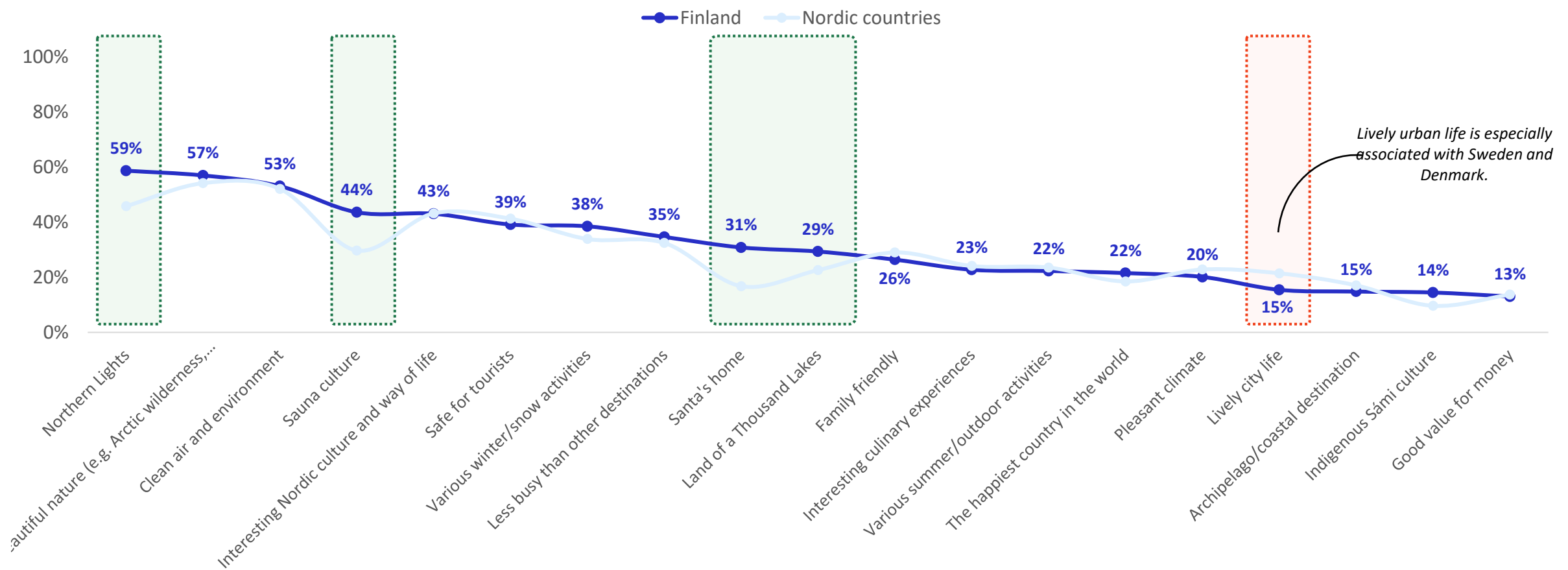
Differences between markets:

The Japanese also connect **the home of Santa Claus** strongly with Finland.

For Americans, **sauna culture** is not very strong associated with Finland. Instead, they regard Finland as safe and family-friendly slightly more often than respondents in other markets.

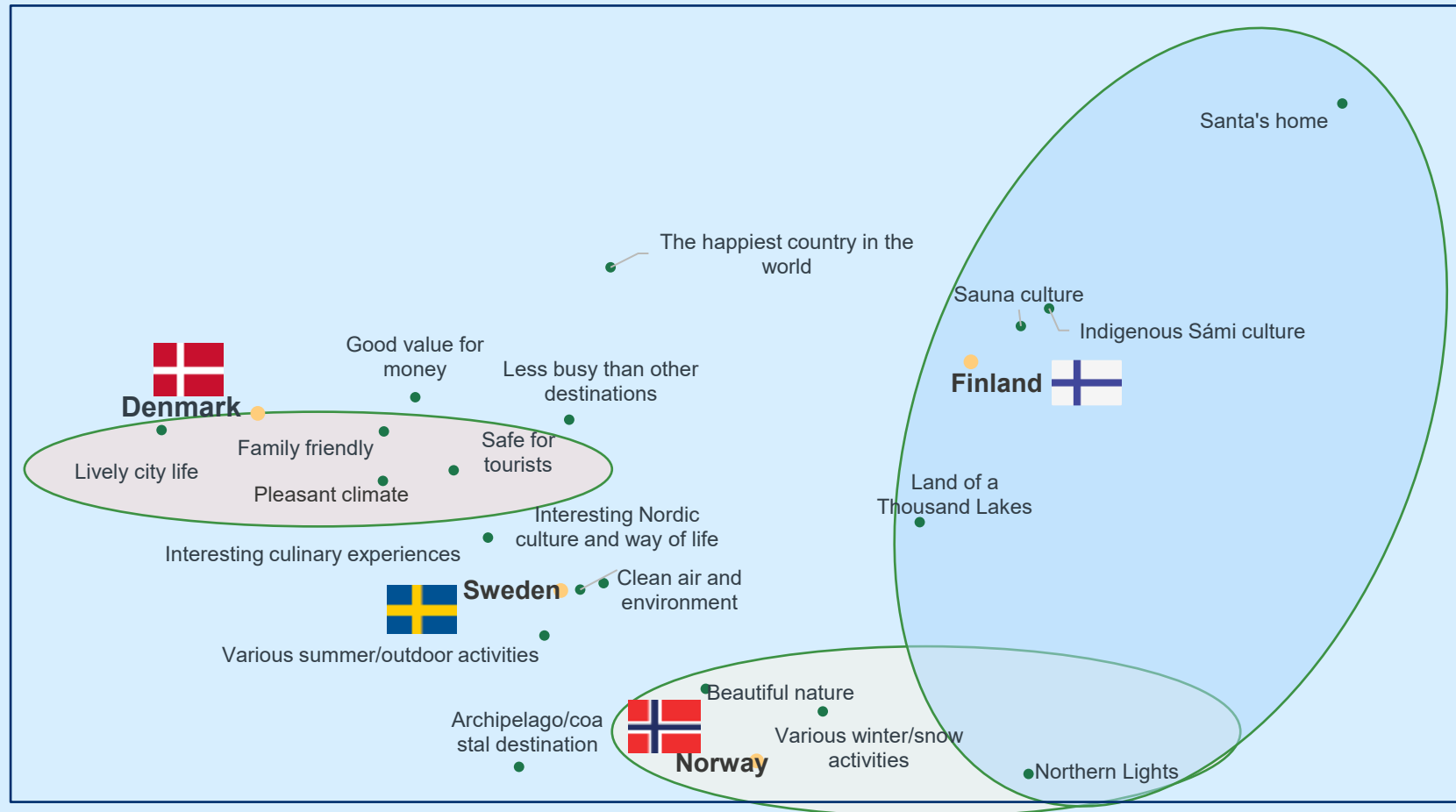
The other Nordic countries are also strongly associated with the Northern Lights, beautiful nature and clean air and the environment. However, Finland is slightly ahead of the Nordic countries in terms of associations with, for example, the Northern Lights, sauna culture and Santa's home.

Country image, Finland



The images that best represent Finland are Santa's home and sauna culture. Among the Nordic countries, Denmark has the strongest image as a city destination.

Country image, relative image

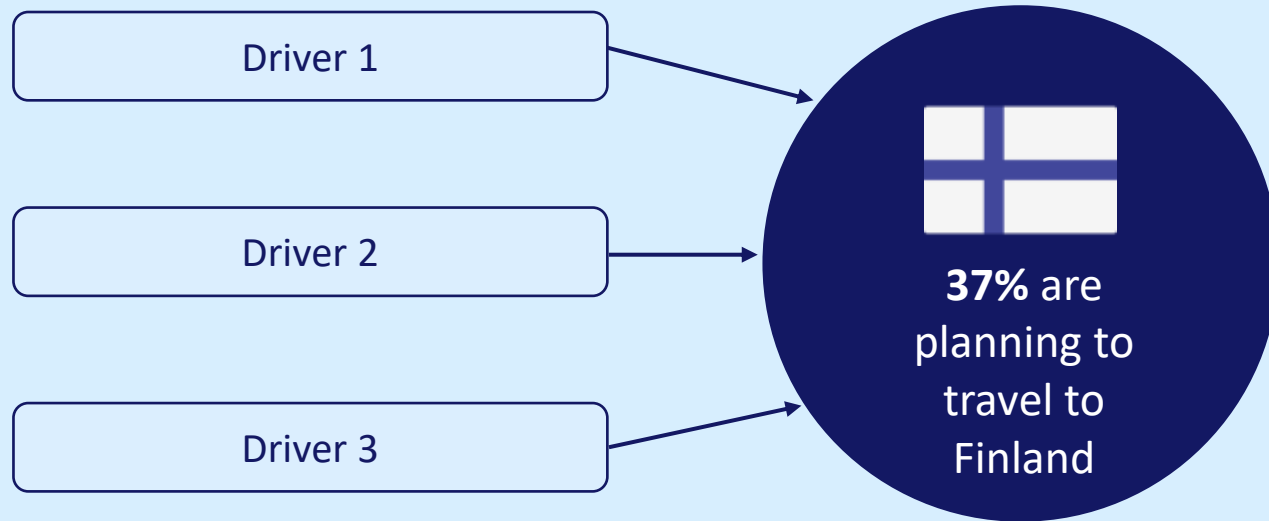


Comments

Finland stands out most from the other Nordic countries on the back of two images: the home of Santa Claus and the sauna culture. Both Finland and Norway are characterised by the Northern Lights. Slightly less distinctive, but nevertheless the most strongly characteristic images of Finland are the land of thousands of lakes and the Sámi indigenous culture.

Norway is seen as a nature and winter destination, Denmark as a safe city and family destination. Sweden also stands out to some extent as a city destination, but it does not have such a distinct profile as the other Nordic countries.

What kind of image would promote the consideration of Finland by those planning a holiday trip?



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?

An interesting Nordic culture and way of life is one of the most important images influencing consideration of Finland in all the markets studied. Food is also a key driver of consideration.

The most important attributes that drive consideration for Finland



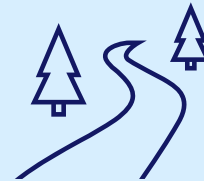
1. Interesting Nordic culture and way of life



2. Safe for tourists



3. Interesting culinary experiences



**4. Beautiful nature
(e.g. Arctic wilderness, midnight sun)**



5. Clean air and environment

2. Finland as a food tourism destination: What is Finland's current image as a food tourism destination and how can it be developed to increase interest among tourists?

Food as part of tourism and Finland as a food tourism destination



Image: Soili Jussila / Vastavalo / Visit Finland

Food and drink experiences are an essential part of a trip, and trying out local foods and new flavours is at the heart of travel.

Traveller type: ranking of key statements by market

1. "I want to try food and drinks made from **local ingredients** and in accordance with the **country's traditions**" (87%)

2. "Food and drink **experiences** during the trip are **important for the overall satisfaction of my holiday**" (83%)

3. "I want to try **new dishes** at different restaurants" (81%)



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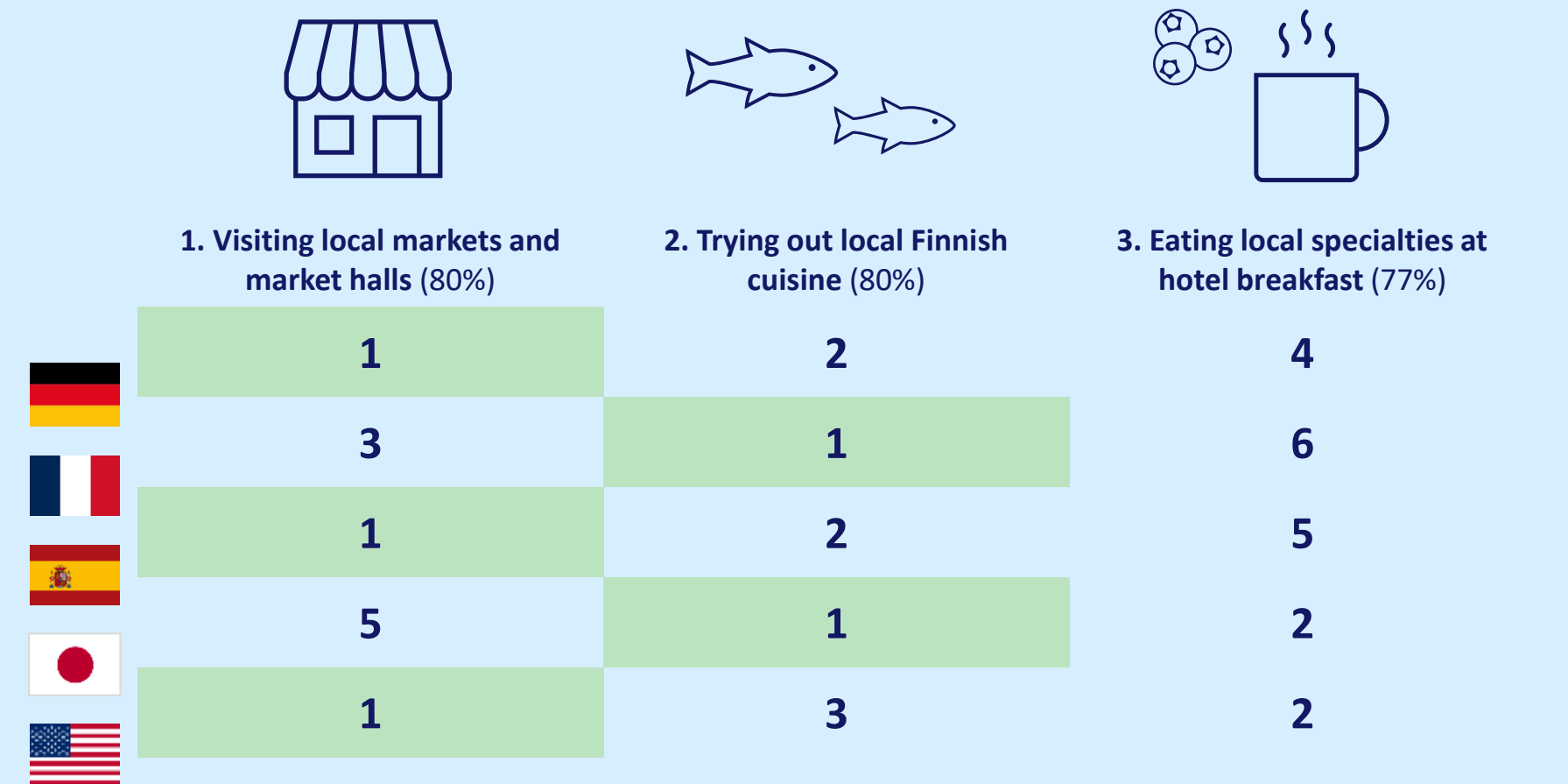
(xx%) = Fully or somewhat agree with the statement

Differences between markets:

Germans emphasise **atmosphere** when choosing a restaurant **Spaniards**, on the other hand, want to make **connections with other people through food** and prefer familiar flavours when travelling. **The Japanese are more interested in food stalls and street food than respondents in other markets**, and, like Germans they have a strong interest in **spending time in cafes**.

Interest in Finnish food experiences is most strongly focused on tasting local foods and specialties, as well as visiting markets and market halls.

Finnish food experiences and activities: ranking of the most interesting experiences by market



Differences between markets:

The French are a little more interested in visiting local farms than others, while eating in nature is less attractive to the Japanese than to tourists from other countries. Fine dining and food festivals, on the other hand, attract more interest in the US.

The greatest interest is focused on easily accessible and authentic everyday Finnish food experiences that emphasise locality, tradition and closeness to nature.

						Average%	
Visiting local markets and market halls	1	3	1	5	1	80%	Invest in the globally most interesting food experiences and activities.
Trying out local Finnish cuisine	2	1	2	1	3	80%	
Eating local specialties at hotel breakfast	4	6	5	2	2	77%	
Discovering typical Finnish food culture	5	5	6	6	4	75%	
Trying traditional Finnish fish or game	6	4	3	3	8	75%	
Eating street food	7	8	7	7	5	71%	
Eating in nature	3	2	4	13	7	71%	Food souvenirs important in Japan and Germany, food festivals in the United States, and farm visits in France.
Buying food souvenirs	8	10	11	4	14	64%	
Travelling around Finland exploring different regional dishes in Finland	13	9	8	9	13	61%	
Trying Finnish specialties	14	12	9	8	16	58%	
Visiting a farm or local food producer	10	7	15	14	12	58%	
Visiting food and drink festivals	16	15	12	11	6	58%	
Visiting local breweries	11	14	13	10	11	58%	Fine dining is of most interest to Americans. In general, interest in all activities is quite high.
Eating wild food from Finnish forests	9	11	14	12	15	56%	
Guided food tours/walks	12	13	10	16	10	55%	
Fine dining restaurants	17	16	18	15	9	47%	
Berry and/or mushroom picking in the forest	15	17	17	17	17	45%	
Fishing	18	18	16	19	19	34%	
Attending a Finnish cooking class	19	19	19	18	18	30%	

Spontaneously, fish, naturalness and simplicity are associated with Finland in all markets, although its cuisine is unknown to most.

Fish and seafood form the strongest and most common image of Finnish food in all markets. In particular, **salmon** is mentioned repeatedly. **Game (reindeer, elk), berries and mushrooms** are also mentioned in several countries.

For respondents in all countries, **naturalness, freshness, healthiness and simplicity** are key features of Finnish food. Food is thought to be **low-processed, pure and based on local and seasonal raw materials**.

The taste is most often perceived as **mild and less spicy** compared to many other cuisines, but some also consider the flavours **strong and unique**. There is disagreement about diversity: some consider Finnish food rich and others monotonous.

Unfamiliarity is typical in all markets: Finnish food is not widely known, but it arouses **curiosity and desire to experiment**. Many people mention that they want to try Finnish food, even though there is little knowledge about it.

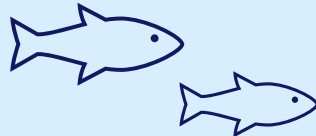
Uniqueness and exoticism are especially associated with game, reindeer, berries and mushrooms. Finnish cuisine is often seen as **Nordic, close to nature and sometimes also coloured by Russian and Baltic influences**.



**What is the image of Finland as a food
tourism destination at the moment?**

The strongest images associated with food in Finland are Nordic flavours, fresh game and fish, as well as food from clean nature.

Food image, Finland



1. Nordic/
arctic flavours (48%)

2. Fresh game and fish (46%)

3. Food from pure nature (32%)



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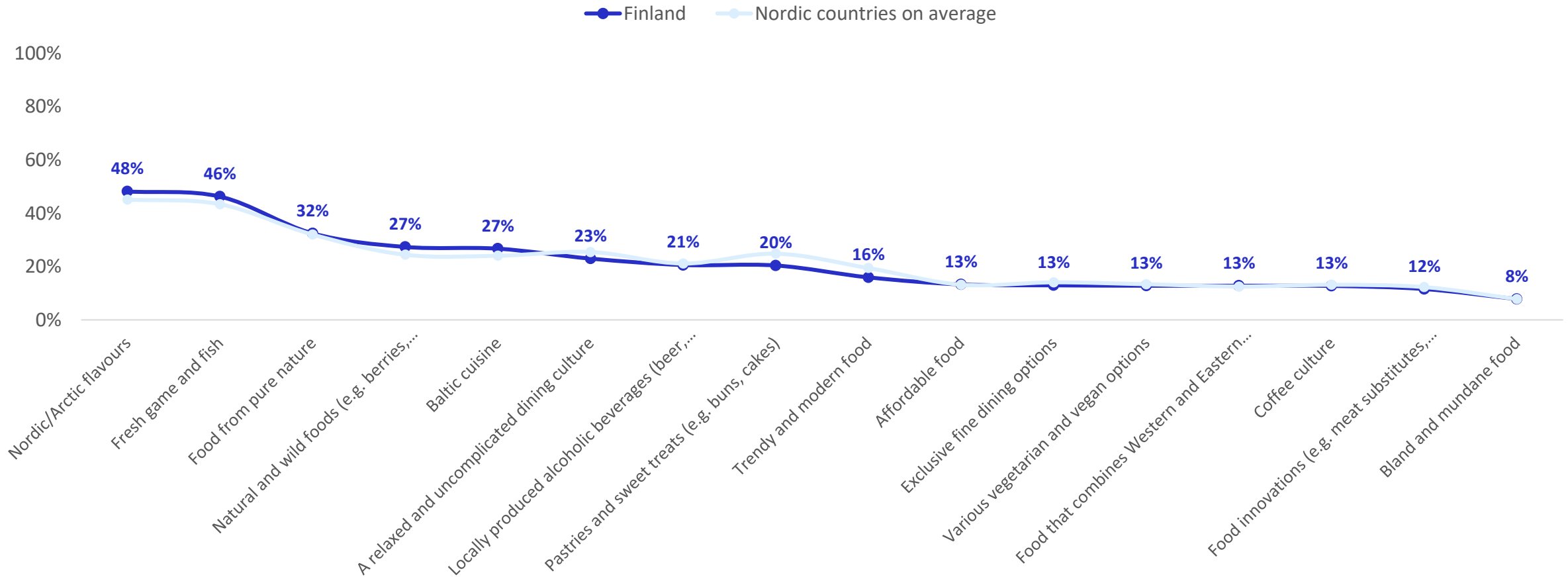
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Differences between markets:

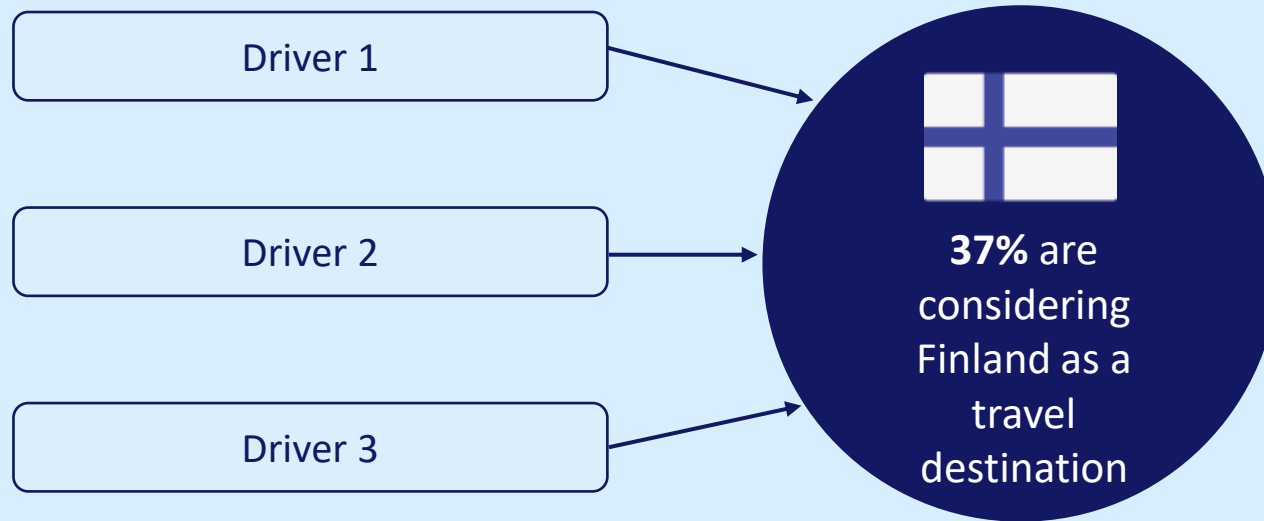
Americans associate **relaxed and uncomplicated food culture, pastries and coffee culture** with Finland more strongly than respondents in other markets. For the Japanese, the most prominent food perceptions are **Baltic culinary culture and wild food**, rather than pure nature.

Other Nordic countries are also most strongly associated with Nordic flavours and fresh game and fish – however, other associations with food are rare.

Food image, Finland



What kind of image would promote the consideration of Finland by those planning a holiday trip?



By means of correlation analysis, driver analysis identifies those images that most strongly promote the consideration of Finland as a destination.

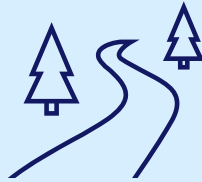
- Which associations are most important for reinforcing consideration?
- What kind of image should be prioritized to boost attraction?
- What image attributes should be monitored at the strategic level in the future?

The image of Nordic flavours, natural purity, pastries and relaxed dining culture is the strongest driving forces for the consideration of Finland as a destination.

The most important food images that promote the consideration of Finland



1. Nordic/
arctic flavors



2. Food from pure
nature



3. Pastries and sweet
treats



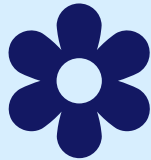
4. Natural and wild
foods



5. A relaxed and
uncomplicated
dining culture

**What are Finland's characteristics,
development points and differentiating
factors from the point of view of food
image?**

Although the food image of Finland and the other Nordic countries is still partly unknown, Finland has potential to strengthen its existing position and stand out from the other Nordic countries.



Characteristics

Important drivers of the consideration of Finland as a destination that Finland, *with* other Nordic countries, is most strongly associated with

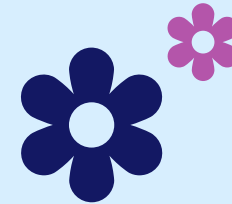
- **Nordic/Arctic flavours**
- **Food from pure nature**
- **Natural and wild foods**
- **Fresh game and fish**



Development points

Important drivers for the consideration of Finland, with regard which Finland could further develop its image and characteristic features

- **Pastries and sweet treats**
- **A relaxed and uncomplicated dining culture**



Invest after careful consideration

Not important as drivers of consideration of Finland as a destination, but contribute to consideration among those considering Finland specifically as a food tourism destination

- **Trendy and modern food**
- **Exclusive fine dining options**

Tourism target groups



Image: Elina Manninen / Visit Finland

How were the segments formed?

The aim of the study was to identify the current **Visit Finland's need-based tourism target groups**.



How? The questionnaire clearly and briefly outlined the main features of the segments and asked the respondent to choose the description that best described themselves.

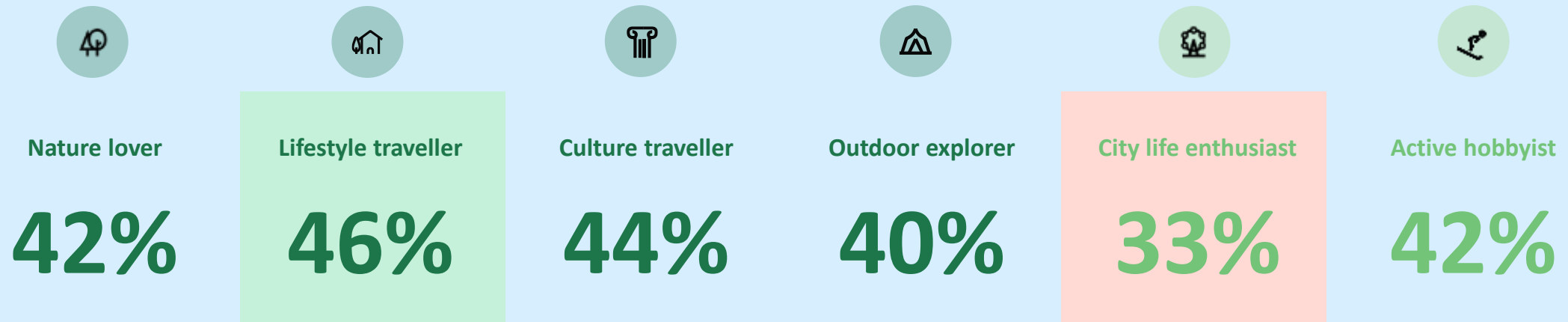
Which traveller type do you most identify with in the context of your next overseas trip?

The result is **11 segments**, whose answers can be used to deepen the current knowledge of Visit Finland's tourism target groups.

[Tourism target groups - Visit Finland](#)

Finland is considered as a destination by an average of 37% of travellers planning a holiday: In the Lifestyle traveller segment, Finland is considered as a travel destination the most, and the least in the City life enthusiast segment

Consideration of Finland by segment



Lifestyle traveller and Culture traveller consider a wider range of countries as their travel destinations in general. With regard to them, the challenge is to get them to select Finland from among other interesting travel destinations.

● Main segments ● Support segments

Savouring local flavours is a feature shared by all traveller groups, but the segments also differ in their food-related travel behaviour.



In addition to local food experiences, different areas of interest related to food experiences and activities are emphasised in the segments.



Nature lover

The Nature lover target group is slightly more interested in eating wild food from Finnish **forests** and eating in nature, but less interested in eating in a fine dining restaurant .



Lifestyle traveller

The Lifestyle traveller group is **more interested in all activities than average**. In particular, **food and drink festivals, visiting farms or local food producers and guided food tours** are of greater interest to this group than average.



Culture traveller

Culture traveller target group is less interested in eating in nature or visiting food festivals than average.



Outdoor explorer

In the Outdoor explorer target group, **berry picking, visiting farms or local food producers, eating wild food, eating in nature and trying traditional Finnish fish or game** are more popular than average.



Citylife enthusiast

People in the Citylife enthusiast target group are more interested in **fine dining** experiences than average. However, they are less interested in many other activities than average, especially eating wild food and visiting farms.



Active hobbyist

As its name suggests, the Active hobbyist target group is very interested in a wide range of activities. Especially fishing, food festivals, fine dining and cooking courses are of more interest to the target group than average.

● Main segments ● Support segments

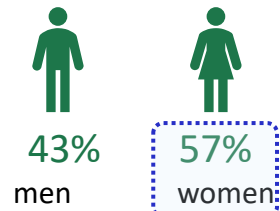


Lifestyle traveller

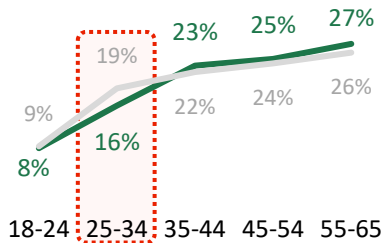
” The segment considers several travel destinations, including Finland, more often than average. Finland's country and food image are strong, and Finnish food experiences are seen as interesting. The challenge is to make people select Finland as a travel destination.

DEMOGRAPHICS*

*In this study



Age distribution:

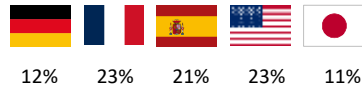


Family with children:



18%
of the target group

Share by market:



Top 3 image favourites:

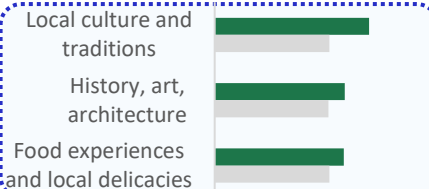


TRAVELLER TYPE

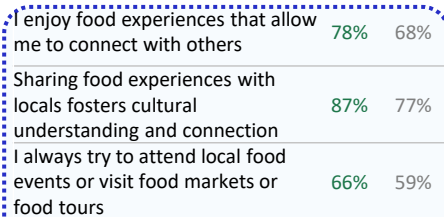
Eating plays an important role when travelling; it is a way to get to know the local culture and way of life.

Interest in Finnish food experiences is higher than average across the board, and the segment is also willing to pay for them.

Top 3 most interesting travel themes:



Top 3 most distinctive statements:

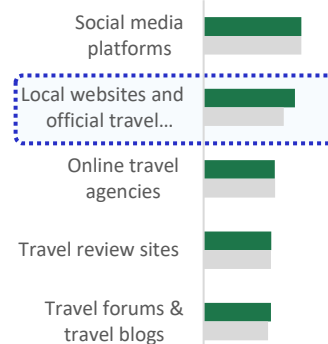


Respondents: 18–65-year olds planning a holiday in Europe in the next three years, Lifestyle Traveller n=905

19% (17%)
Intends to travel to Finland within 3 years

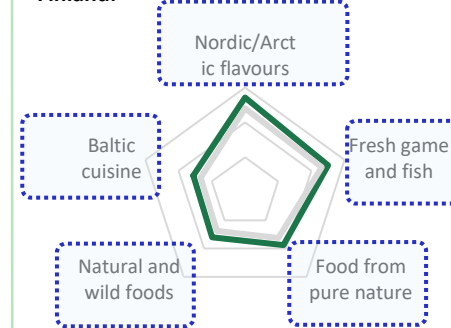
46% (37%)
Consider Finland as a destination

Top 5 information channels in tourism:

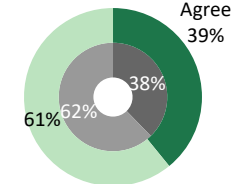


FOOD

Top 5 food images from Finland:



Posts on social media about their food experiences:



Spending money on food while travelling:

Ready to pay more than average for food experiences. Other meals (lunch, dinner) at medium level.

59% (54%)

Interested in Finland as a food tourism destination

The most interesting food experiences:

Visiting local markets and market halls	86%	80%
Trying out local Finnish cuisine	86%	80%
Discovering typical Finnish food culture	82%	75%

Most stand-out food experiences:

Visiting food and drink festivals	65%	58%
Visiting a farm or local food producer	66%	58%
Travelling around Finland exploring different regional dishes	69%	61%

Find information about restaurants before trips (4-5 answers):

65% (65%)
nepa 39

Statistically significant in relation to all travellers
Statistically underrepresented in relation to all travellers

Competitor analysis (in English)

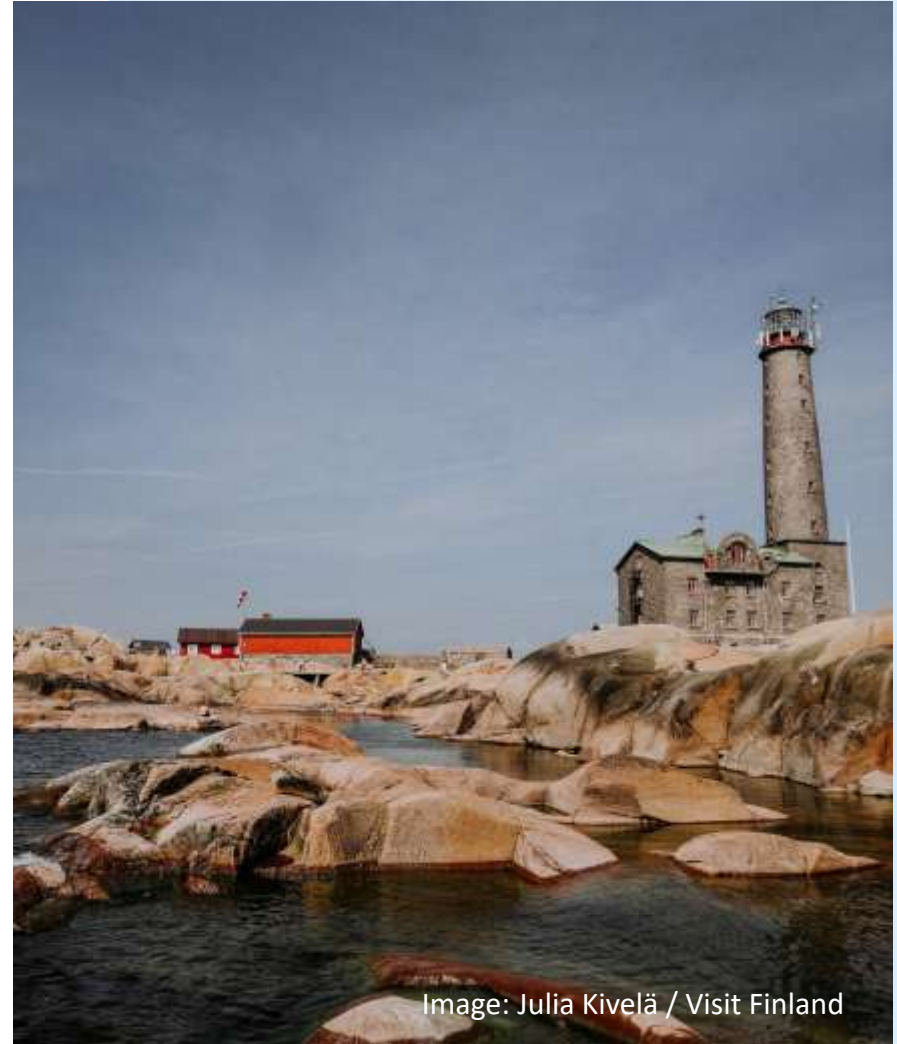


Image: Julia Kivelä / Visit Finland

Search engines, recommendations from family and friends and travel review sites are the most important information search channels when planning a trip.

Information search channels: channels' ranking by market

						Average%
Search engines (e.g. Google)	1	1	1	1	1	62%
Recommendations from friends and family	2	2	2	7	2	51%
Trip review sites (e.g. TripAdvisor, Yelp)	5	3	4	3	3	46%
Local websites and official travel websites	6	4	3	2	5	43%
Social media platforms (e.g. Instagram, Facebook, TikTok, Youtube, Reddit)	7	5	6	4	4	41%
Travel TV shows & documentaries	4	6	8	5	6	38%
Online travel agencies (e.g. Expedia, Booking.com)	3	7	5	9	7	36%
Travel forums & travel blogs	8	8	7	6	7	33%
Travel magazines and print publications	9	9	9	8	10	25%
Social media influencers	10	10	11	10	9	20%
AI platforms (e.g. ChatGPT, Claude, Copilot)	12	11	10	11	12	17%
Online magazines and newspapers	11	12	12	12	11	16%
None of these	13	13	13	13	13	3%

Search engine visibility and previous good experiences, on the basis of which Finland is recommended, are key sources of information.

The role of official travel sites is also very important, especially in Japan and Spain. Social media visibility is also essential.

Order by market average

Background and method



BACKGROUND & OBJECTIVE

- ✓ **What is the current state of food tourism marketing in the Nordic countries, and how can Finland stand out?**

MAIN QUESTIONS

- ✓ **Identify differentiators:** Which themes connect the Nordic countries, and which are unique to Finland?
- ✓ **Identify target groups:** To whom are the messages aimed?
- ✓ **Evaluate marketing strategies:** Is food communication a separate theme or part of travel communication?



SOURCES

Tourism websites and social media channels (FB, IG, +YT for Norway) of Sweden, Denmark, Norway, and their capital cities.

Social media review period:
January 2024 – May 2025.

For comparison, the tourism websites and social media channels of Finland and Helsinki will also be reviewed as part of the analysis.

Content to be analyzed:

- Food-related images and texts
- Website structure
- Campaign strategy in social media



Image credits: Jussi Hellsten / Business Finland website



Many of the food-related topics are alike – which is in line with the finding that overall food image is similar across Nordic countries.



- ✓ **LOCAL PROVENANCE:** All three emphasize local, seasonal, and sustainable ingredients (farm-to-table, sea-to-table, forest-to-table). There's a clear preference for authenticity over glamour, highlighting small producers and "quiet luxury."
- ✓ **NATURE:** Food is deeply tied to each country's natural landscape, with visuals and messaging linking cuisine to forests, seas, and pure environments.
- ✓ **SEASONALITY & RITUALS:** All feature local festivities (Christmas, Easter, Midsummer) and the rhythm of the seasons as essential parts of food culture.

- ✓ **COFFEE & PASTRY CULTURE:** Sweden (fika) and Denmark (hygge, cakes, buns) especially; Norway to a lesser extent (waffles).
- ✓ **SUSTAINABILITY:** Eco-friendly and sustainable practices are consistently highlighted.
- ✓ **TRADITIONS AND LOCAL CULTURE:** Food is a way to get to know the local way of life and history of both the countries and their regions.
- ✓ **TARGET AUDIENCE:** All countries talk mostly to culture travelers and eco-conscious visitors and put less emphasis on family travel. However, some differences exist in target audiences

Differentiation is achieved to some extent through local signature foods and experiences, and mostly with the style and tone of voice.

Aspect	 Sweden	 Denmark	 Norway
Positioning	Sweden presents food as a window into local life, focusing on both traditional and modern aspects. It is framed as innovative, sustainable food destination, closely connected to nature.	Denmark is marketed as a dynamic culinary destination, famous for its gourmet scene and innovative New Nordic cuisine, while equally celebrating comfort food and tradition.	Norway's food marketing is secondary to its nature. Food content is anchored in dramatic landscapes and food from pristine environments. Strong focus on both tradition (seafood, preservation methods) and innovation.
Signature experiences	Focus on fika (coffee and pastries as a social ritual), foraged foods, and both everyday and fine dining.	Michelin-star restaurants, beer culture (on website), street food, smørrebrød, pastries, and oyster safaris.	Seafood, foraged and seasonal foods, fruit, bread, fine dining. Food safaris and regional specialties are also prominent.
Visual & tone	Calm, understated, and idyllic visuals. Tone is inclusive, poetic, but not humorous. Imagery often shows food in nature or people sharing meals outdoors.	Images are more realistic, everyday, and approachable, more urban environments. Tone is light, and humorous.	Heavy use of landscape imagery, often more prominent than text. The tone is welcoming and down-to-earth.
Marketing approach	Food is not a separate theme but interwoven with broader lifestyle and nature narratives. Social media is used for inspiration, with poetic and image-rich content.	A blend of fine dining and budget-friendly experiences, especially on the website. Emphasis on participation and experimentation. Campaigns encourage active exploration of food experiences.	Food is tied to adventure, sustainability, and local identity. Recommendations feature seafood safaris, and immersive experiences.
Target audiences	Wellness and lifestyle travelers, in addition to nature lovers.	More emphasis on foodies, but budget travelers' needs are also addressed.	Adventure-seekers, nature lovers, and foodies.



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