ReiseAnalyse

From Interest to Choice: What Drives Demand for Finland and its Destinations in Germany?

New evidence on market potential, travel motivations and destination preferences in the summer



November 2026
Ulf Sonntag, NIT


THE EMBASSY OF
FINLAND IN CANBERRA WILL BE
TEMPORARILY CLOSED ON
TUESDAY, 10 NOVEMBER 2026.
REGULAR HOURS WILL RESUME ON
WEDNESDAY, 11 NOVEMBER 2026.
of the embassy


@FINLANDINAUSTRALIA
decided to do,







Strategic and methodological approach

Photo: Harri Tarvainen / VisitKarelia

Our Approach | Why Germany matters

Germany as a potential strategic stability market

Finland‘s strategic challenge	Potential contribution of the German market
Winter seasonality	Demand for summer and potentially other seasons
Regional concentration	Interest in several destination types and destinations
Short stays	Preference for trips of around 8–14 nights
Limited regional conversion	Strong advance planning and booking behaviour
Need for sustainable value	Potential for longer, varied and multi-regional trips

Germany is not only a volume opportunity.
German demand may contribute to longer stays, summer growth and broader regional distribution.

© FUR, 2026

Our Approach | The strategic questions

What do we need to know to use this opportunity?

1 Market

Is Germany a stable and sizeable market, and what would Finland need to do to win the choice?

2 Proposition

Which summer experiences can make Finland distinctive and relevant within the Nordic competitive set?

3 Destination roles

How do preferred destination types translate into Finnish destination choice and regional roles?

4 Conversion

What must become clearer, easier and more bookable to turn interest into an actual trip?

The presentation will answer these four questions and translate the findings into implications for Finland and each destination.

© FUR, 2026

Our Approach | Building knowledge over time

From Finland's market position to regional destination choice

2016 and 2019

- Market position and overall image
- Size and structure of Finland's German market potential
- Finland's position among competing destinations
- Overall destination image

2021

- A deeper understanding of potential visitors
- Travel interests
- Target groups and motivations
- Initial customer journey insights

2024

- What Germans want to experience in Finland
- Preferred products and activities
- Experience expectations
- Segments and information behaviour

2026

- How holiday preferences translate into destination choice
- Summer-specific demand
- General destination types
- Knowledge of Finnish regions
- Regional interest
- Barriers, activation and booking

© FUR, 2026

Our Approach | The remaining knowledge gap after 2024

We understood the desired experience, but not yet the regional choice

What 2024 clarified

- What potential visitors want to experience
- Which products and activities appeal
- How different traveller types approach Finland

What remained unclear

- How these desires translate into the four Finnish destination areas
- Whether German travellers can meaningfully distinguish the regional offers
- Which experiences lead towards Lakeland, Coast, Helsinki or Lapland
- Where regional positioning is clear and where overlaps or contradictions remain

Limited regional knowledge made it difficult to ask travellers directly which Finnish destination promise they preferred

© FUR, 2026

Our Approach | The 2026 solution

Start with destination types, not with regional names

Forests & Lakes



Coast & Islands



City & Culture



North & Vastness



This approach allows us to understand regional preferences without assuming detailed knowledge of Finnish geography.

© FUR, 2026

Our Approach| Market potential and summer specific insights

One strategic story, two complementary studies

ReiseAnalyse

- Representative German-speaking population in Germany
- Long-term continuity
- Face-to-face and supplementary modules
- Holiday trips and future destination interest
- Market size and trend perspective

- Overall German travel market
- Long-term trends
- Finland's market potential
- Nordic competitive context
- No evidence of a coolcation-driven shift

2026 Ad-hoc Study

- 1,047 completed online interviews
- Fieldwork: 12–22 September 2026
- Sweden and Norway comparison samples
- 794 Finland potentials
- 570 Finland summer potentials

- Summer-specific expectations
- destination types and products
- Activities and motivations
- Barriers and activation
- Regional knowledge and choice
- Information and booking behaviour

Reiseanalyse quantifies the opportunity. The ad-hoc study explains how Finland can convert it.

© FUR, 2026

Market opportunity

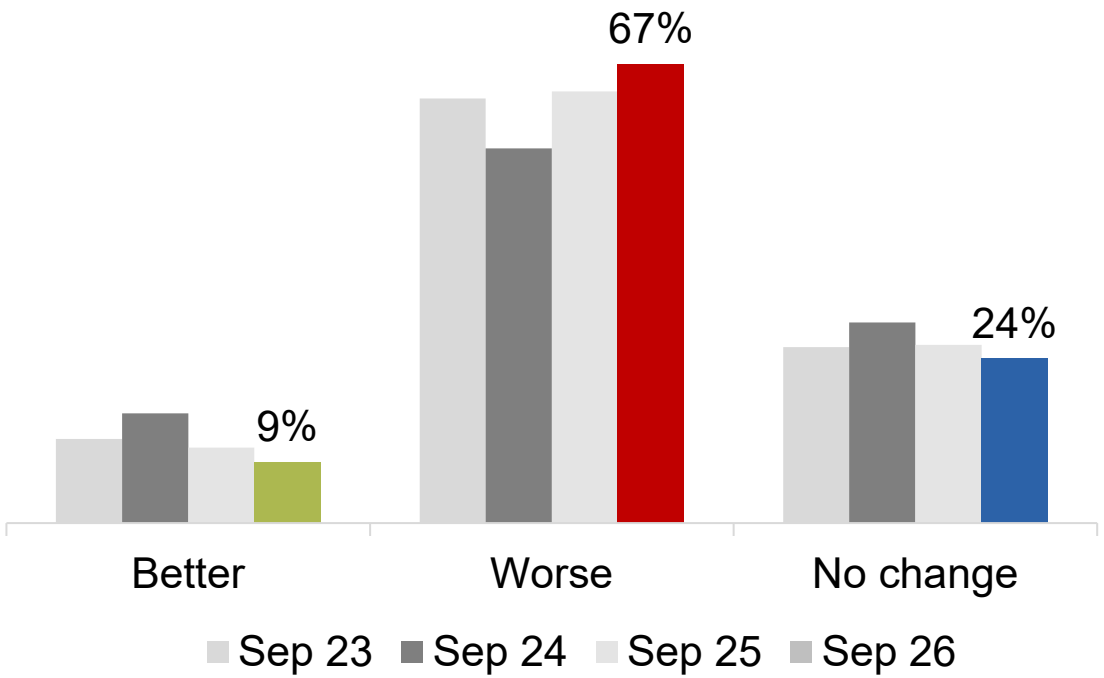


Photo: Asko Kuittinen / Visit Finland

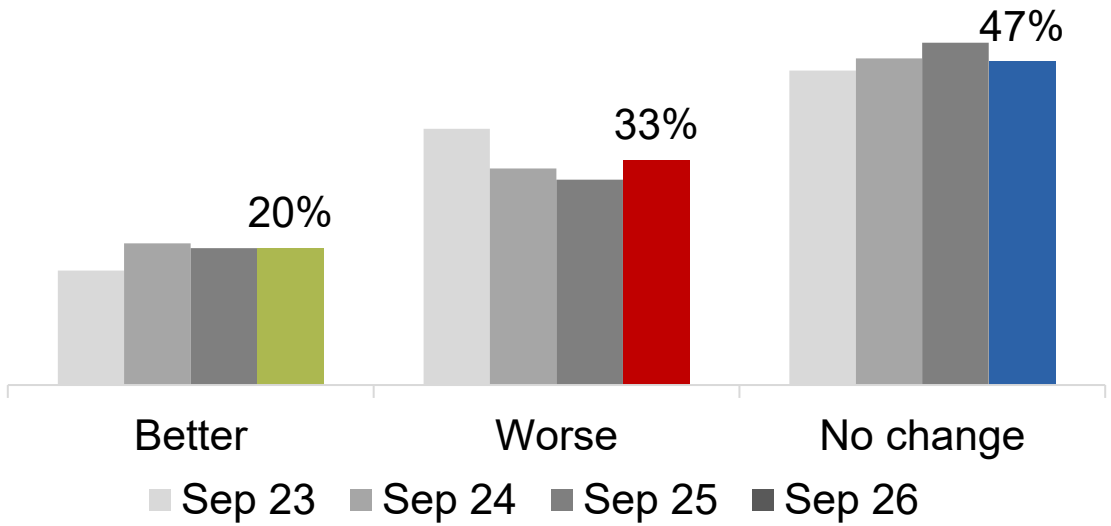
Market | Assessment of the economic situation

Perceived economic outlook is not great – but 67% see personal stability or improvement

General economic situation



Personal economic situation

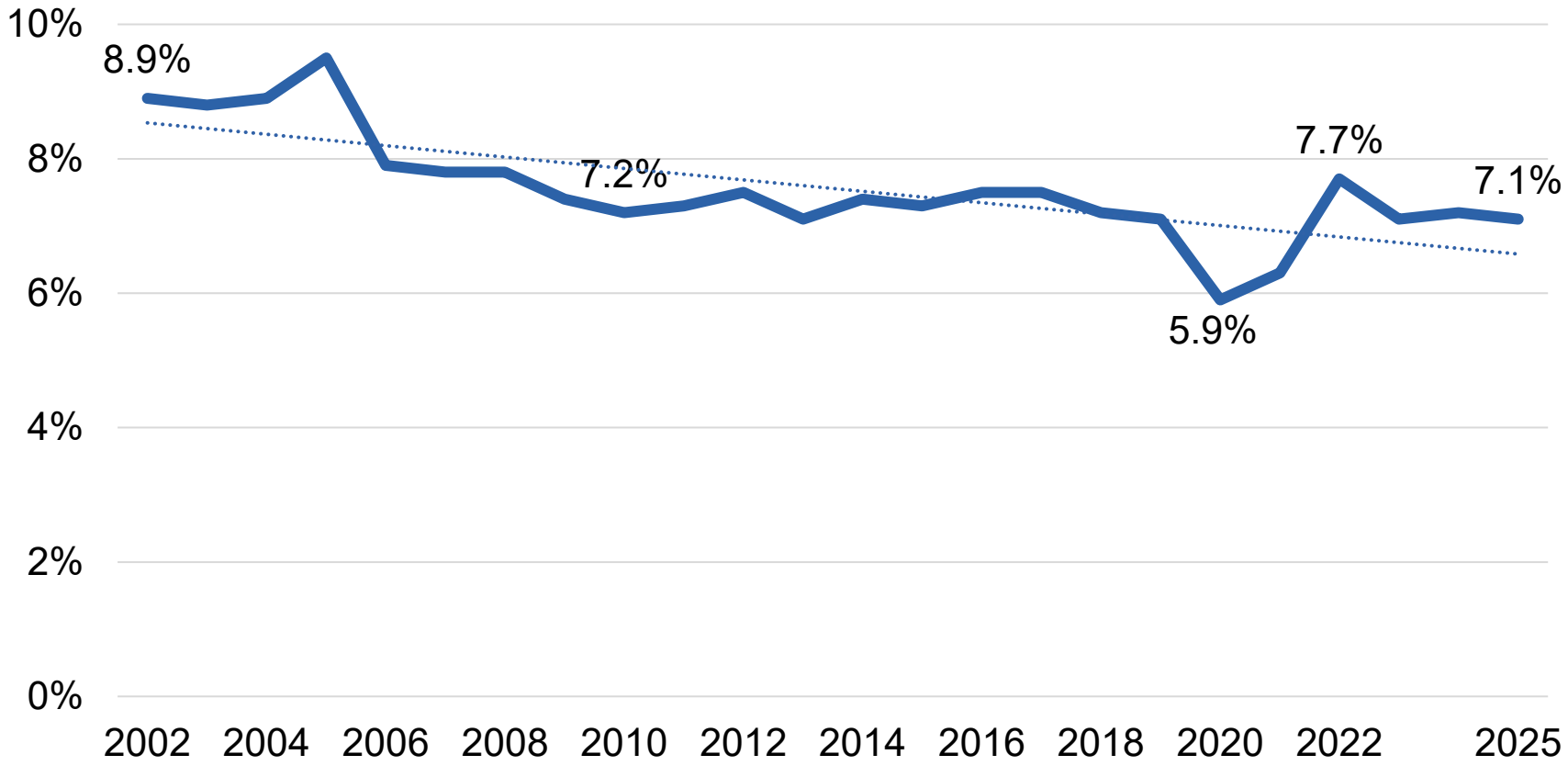


Question: How do you assess the general economic situation in Germany / your personal economic situation? Will it be better, worse or the same in about a year's time?
Basis: German-speaking population, 14 years and older, in Germany
Source: RA 2027, Update Travel Plans 2026/2027 and previous studies

© FUR, 2026

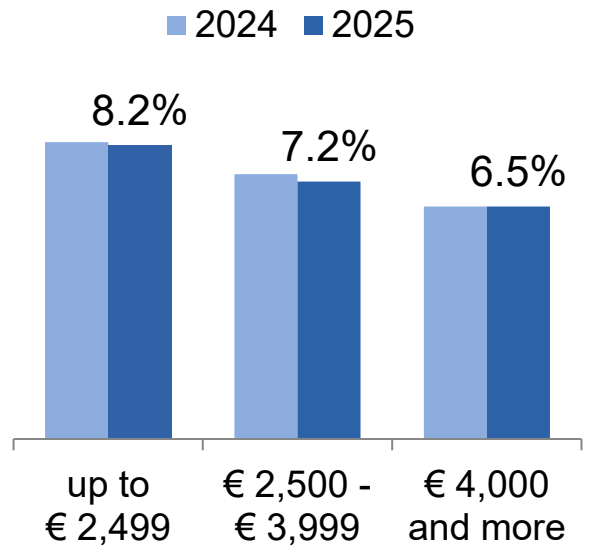
Market | Travel expenditure as % of net household income

No visible danger that increasing travel costs are driving people out of the market





Share of NHH-income by income groups 2024/2025

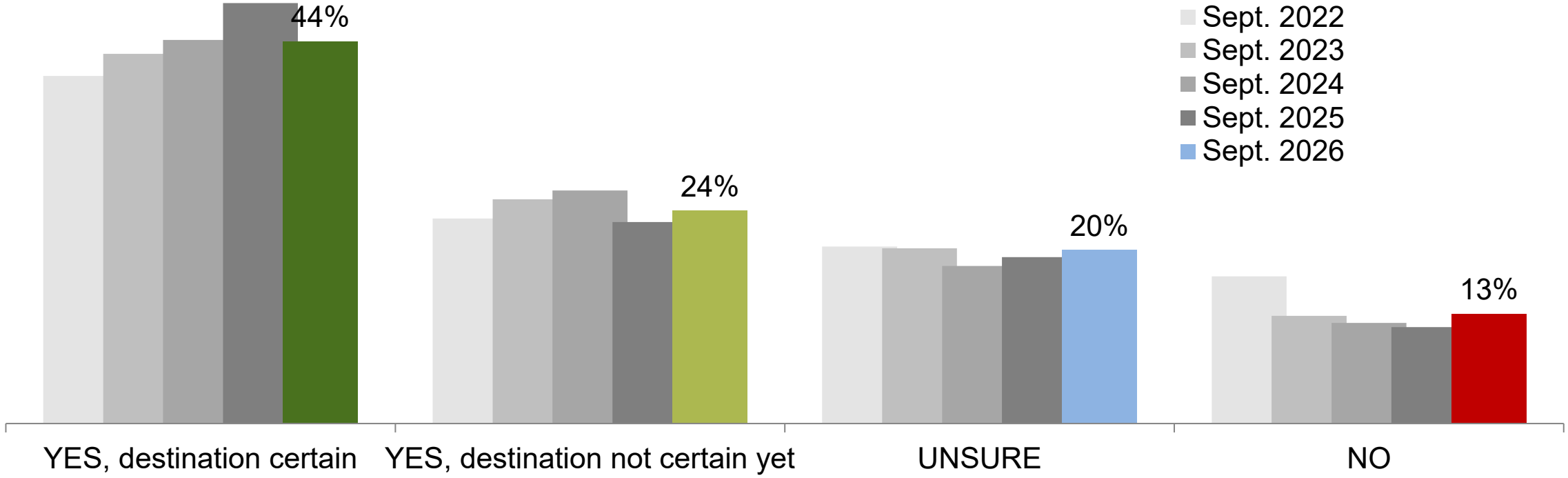


Basis: German-speaking population aged 14 and over who have taken at least one holiday trip of 5+ days in the previous year
Source: RA 2003 to 2026 *face-to-face*

© FUR, 2026

Market | Travel Plans in the next 12 months

Economic uncertainty has not turned into a travel demand crisis



Finland is competing for an active travel market, not trying to reactivate a dormant one.

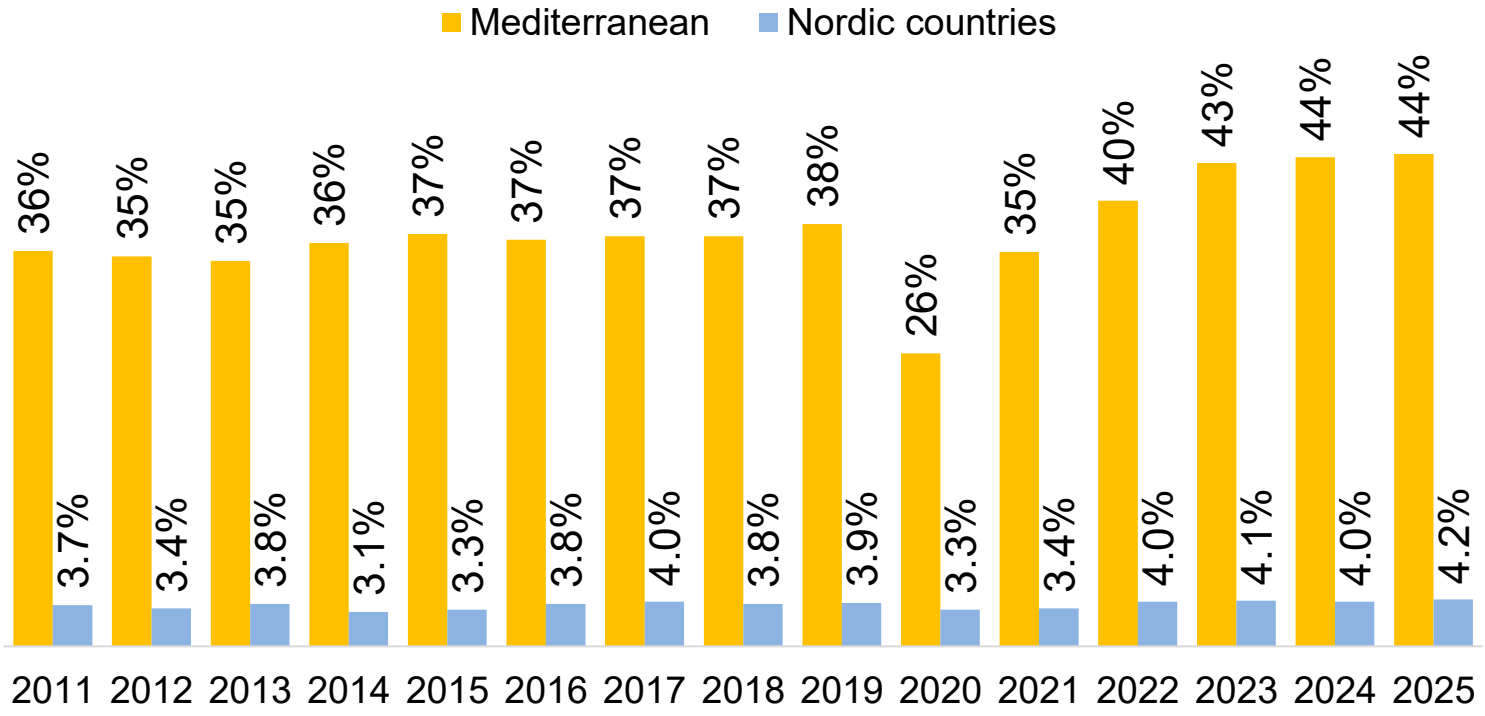
Question: Thinking about [the next 12 months], do you already have any holiday plans for that period?
Basis: German-speaking population, 14 years and older, in Germany
Source: RA 2027, Update Travel Plans 2026/2027 and previous studies

© FUR, 2026

Market | Destination trends

The Mediterranean will remain THE holiday favourite; Nordics doing good on their level





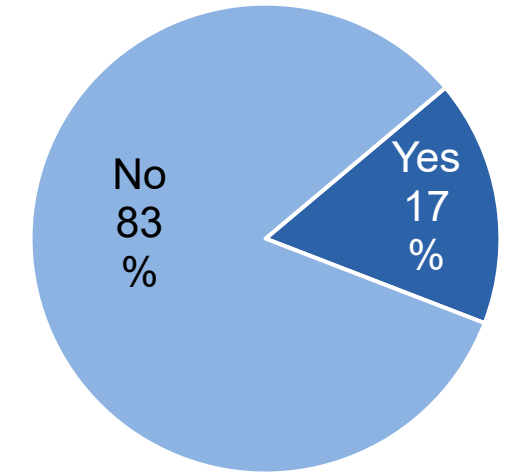
Holiday trips (5+ days) taken by the German-speaking population of Germany aged 14 and over; RA 2012–2026

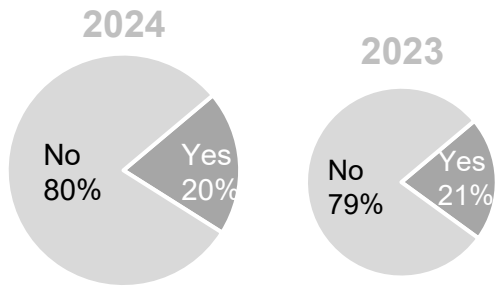
© FUR, 2026

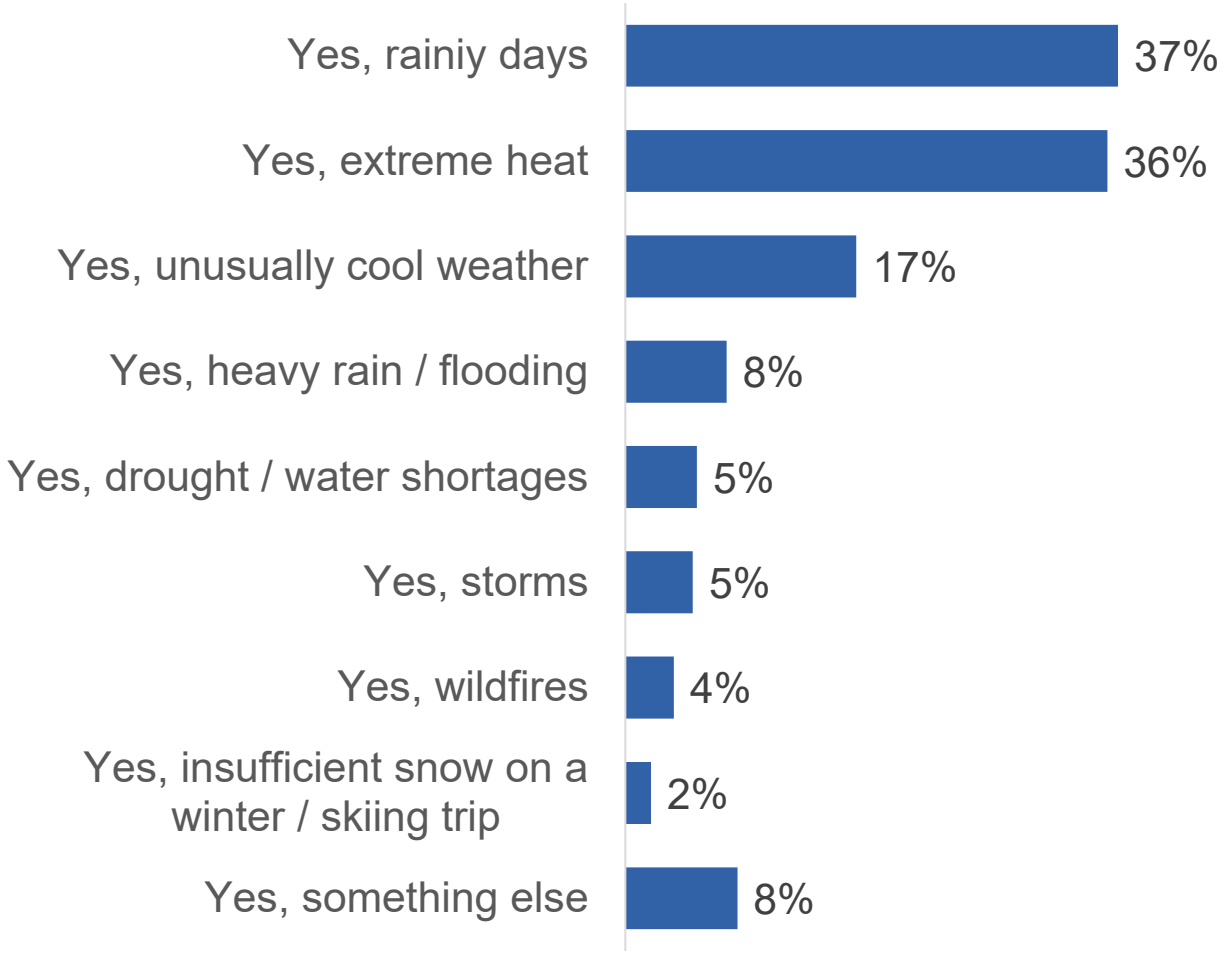
Market | Weather events during the main holiday trip

17% had negative weather experiences – out of these 36% because of heat

„Did you experience weather phenomena during your main holiday trip that had a negative impact on your holiday experience?“





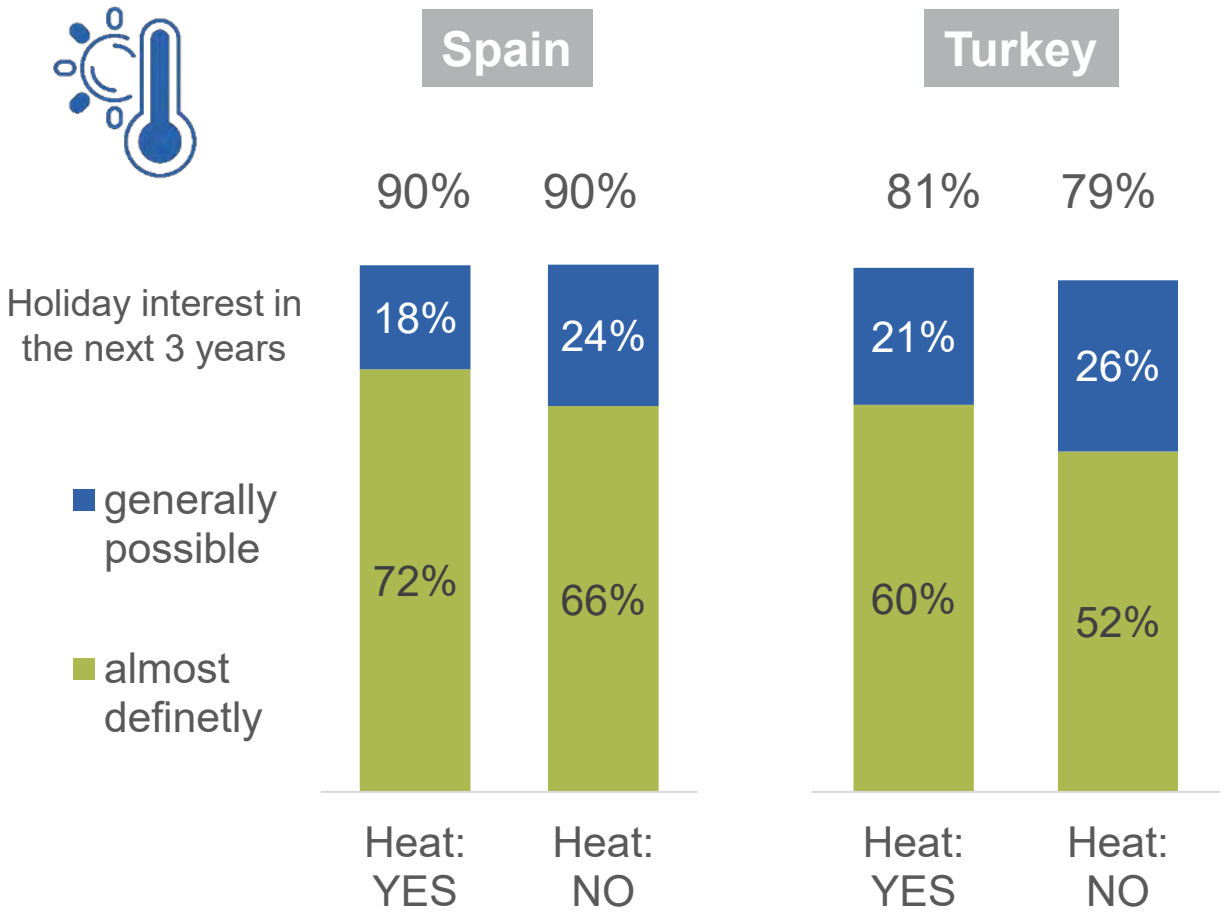


Frage: During your most recent main holiday in 2025, in [month] in [destination], did you experience any weather events that negatively affected your holiday experience?;
Basis: German-speaking population of Germany aged 14 and over who took at least one holiday trip lasting five days or more in 2025;
Source: RA2024 - RA2026 face-to-face

© FUR, 2026

Market | Plans to return despite the heat

No sign of a shift towards coolcations



Don‘t expect climate change to do your job!
You can do it better ☺

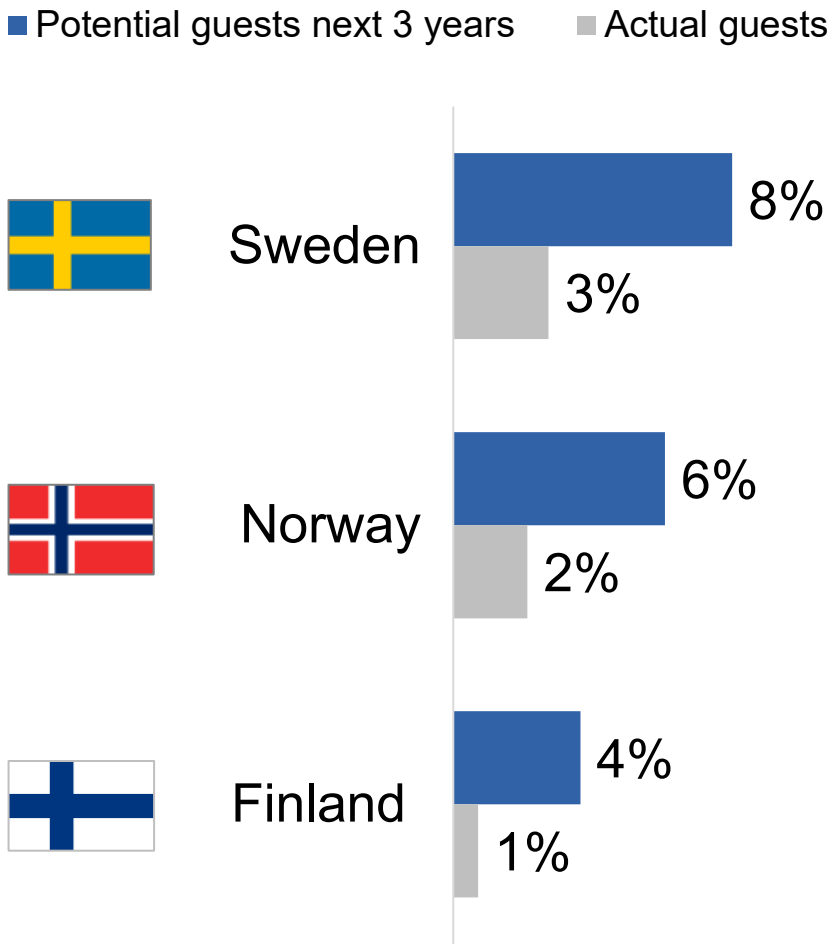
Don’t count on push factors that you do not control but work on the pull factors that are in your hands

Question: During your main holiday in 2025/2024/2023, did you experience any weather events that negatively affected your holiday experience?
Base: German-speaking population of Germany aged 14 and over who took at least one holiday trip lasting five days or more in 2025/2024/2023; (cumulative figures)
Source: RA2024 - RA2026 face-to-face

© FUR, 2026

Market | Interest to travel to the Nordics

Most are interested in all three Scandinavian destinations – Scandinavia-Lovers



People interested to travel to Finland 2026-2028 and Scandinavia

2.4 million

0.4 million

0.3 million

0.5 million

Question: Are you almost definitely planning to go on a holiday to one of these countries in the next three years? And which of these countries would you generally consider as a holiday destination in the next three years?
Basis: Left: German-speaking population 14+ years in Germany; Right: People interested to travel to Finland 2026-2028 (“almost definitely planning” or “generally considering”) in German-speaking population 14+ years in Germany; Source: RA 2026

© FUR, 2026

Strategic answer 1 | Market opportunity

Germany is worth investing in, but Finland must actively earn the choice

Stable demand provides a reliable foundation

German travel intentions remain high despite a weak general economic outlook.
Holidays continue to receive a protected share of household spending.

Coolcation creates no automatic advantage

Heat affects some holiday experiences, but Mediterranean demand remains strong
and travellers continue to consider destinations where they experienced heat.

Finland has measurable but shared potential

Future interest in Finland is substantially larger than recent visitation, but most Finland potentials
also consider Sweden and Norway. Finland competes for shared Nordic demand.

**The German market offers room for growth, but growth must come from attractive Finnish pull factors,
not from economic recovery or climate-related push factors.**

© FUR, 2026

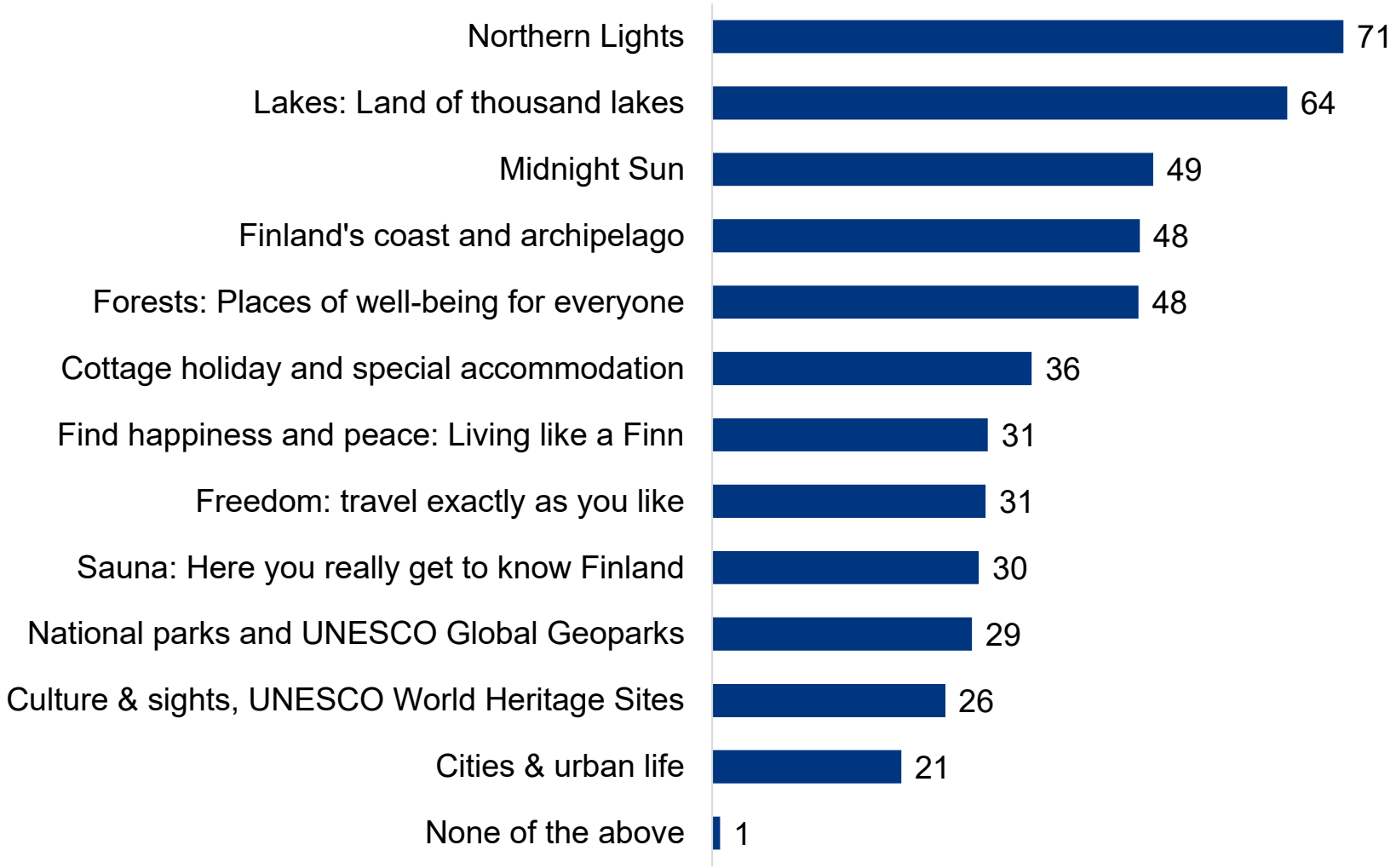


Finland’s summer proposition

Photo: Mikko Huotari / Visit Finland

Proposition | Highlights of Finland

Nature aspects shape the image



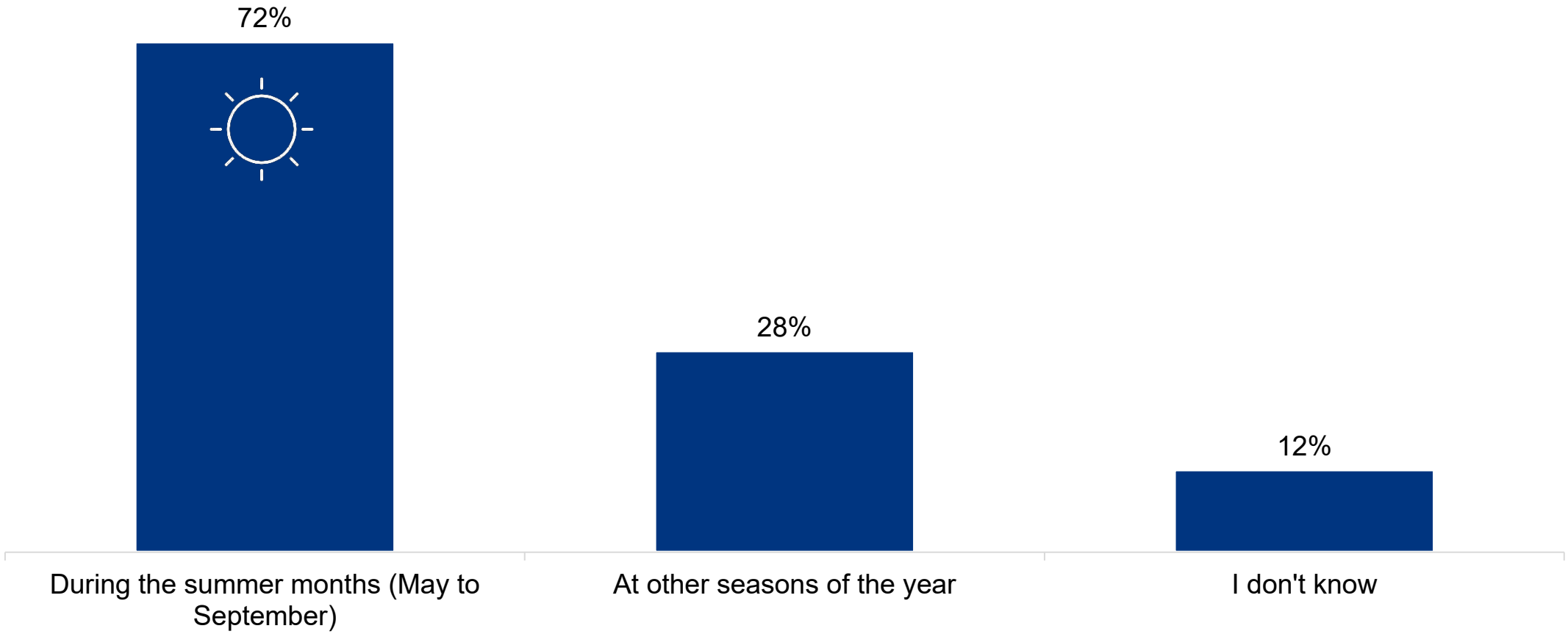
Finland’s image remains strongly nature-based, with lakes as the strongest clearly summer-relevant asset.

F5: What do you think are the special highlights of Finland as a holiday destination? Please select all answers that are applicable; in %; Please note that several new items were added in the 2026 survey;
Basis: Finland Potential 2026 (n= 794);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT;

© FUR, 2026

Proposition | Preferred season to visit Finland

72% would like to travel to Finland May-September, 28% at other seasons of the year

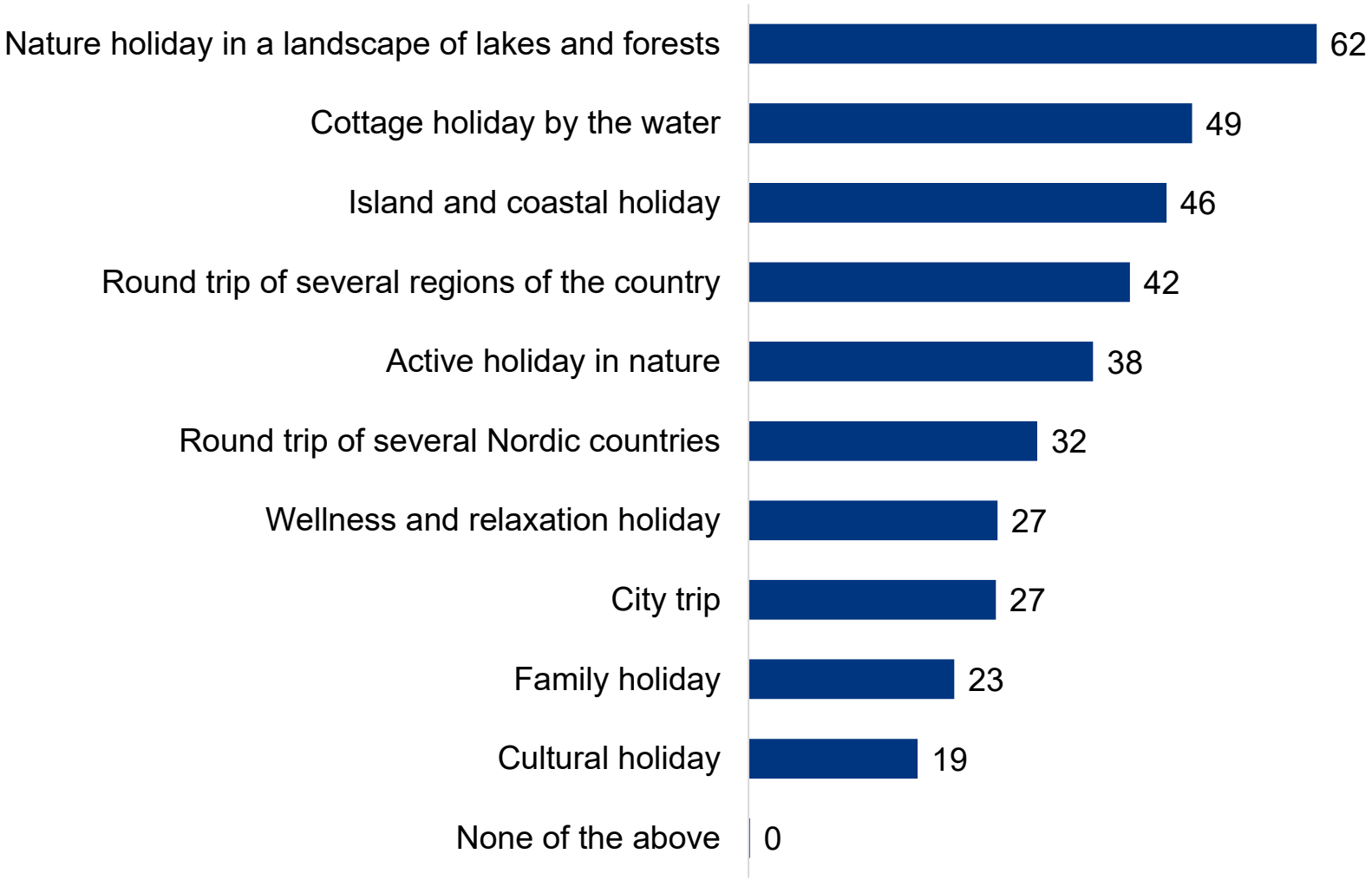


F6: In which season would you like to travel to Finland? (Multiple choice)
Basis: Finland Potential 2026-2028 (n= 794);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Preferred types of summer holiday

Nature and water form the core, while round trips broaden the opportunity

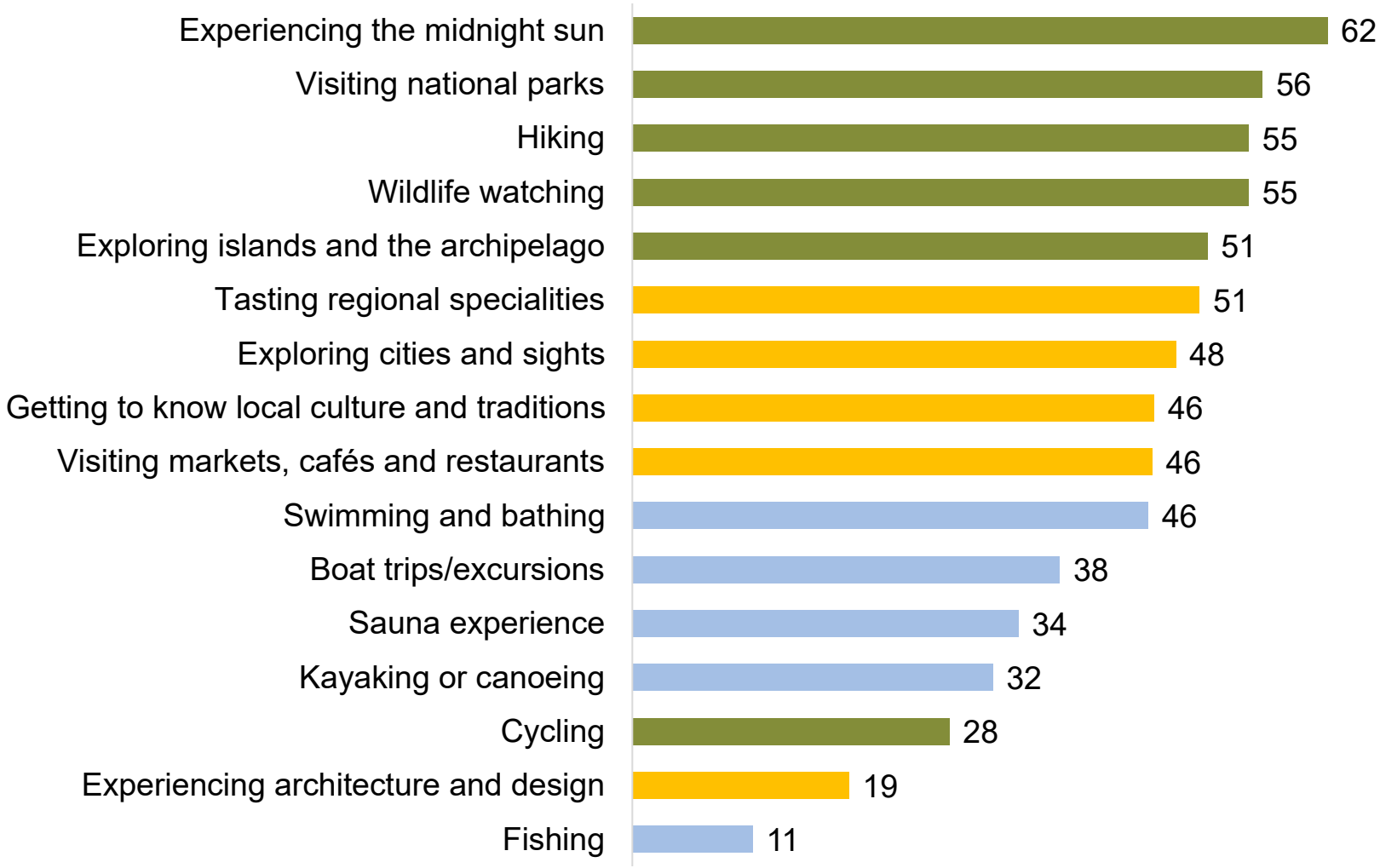


F7: What type of holiday would you like to experience on a summer trip (i.e. from May to September) to Finland? Please select all that apply.; in %
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Preferred types of summer activities

Nature is the foundation, not the whole journey



Nature and outdoors

Culture and local life

Water and wellbeing

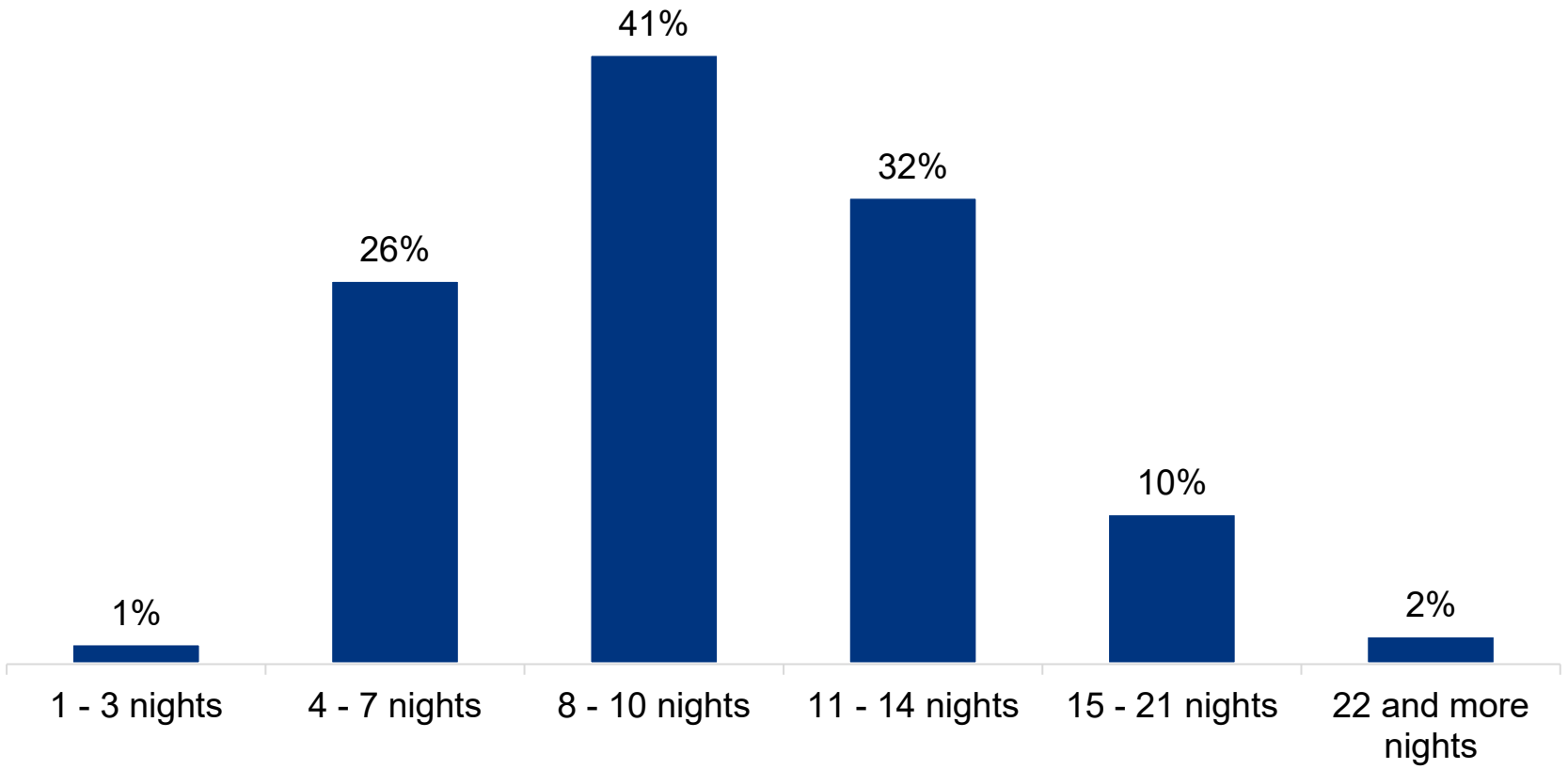
A Finnish summer journey combines nature, water, local life and discovery.

F8: What activities would you like to do during your summer holiday (i.e. from May to September) in Finland? Please select all that apply.; in %
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Duration of trip

The preferred length of stay supports richer journeys



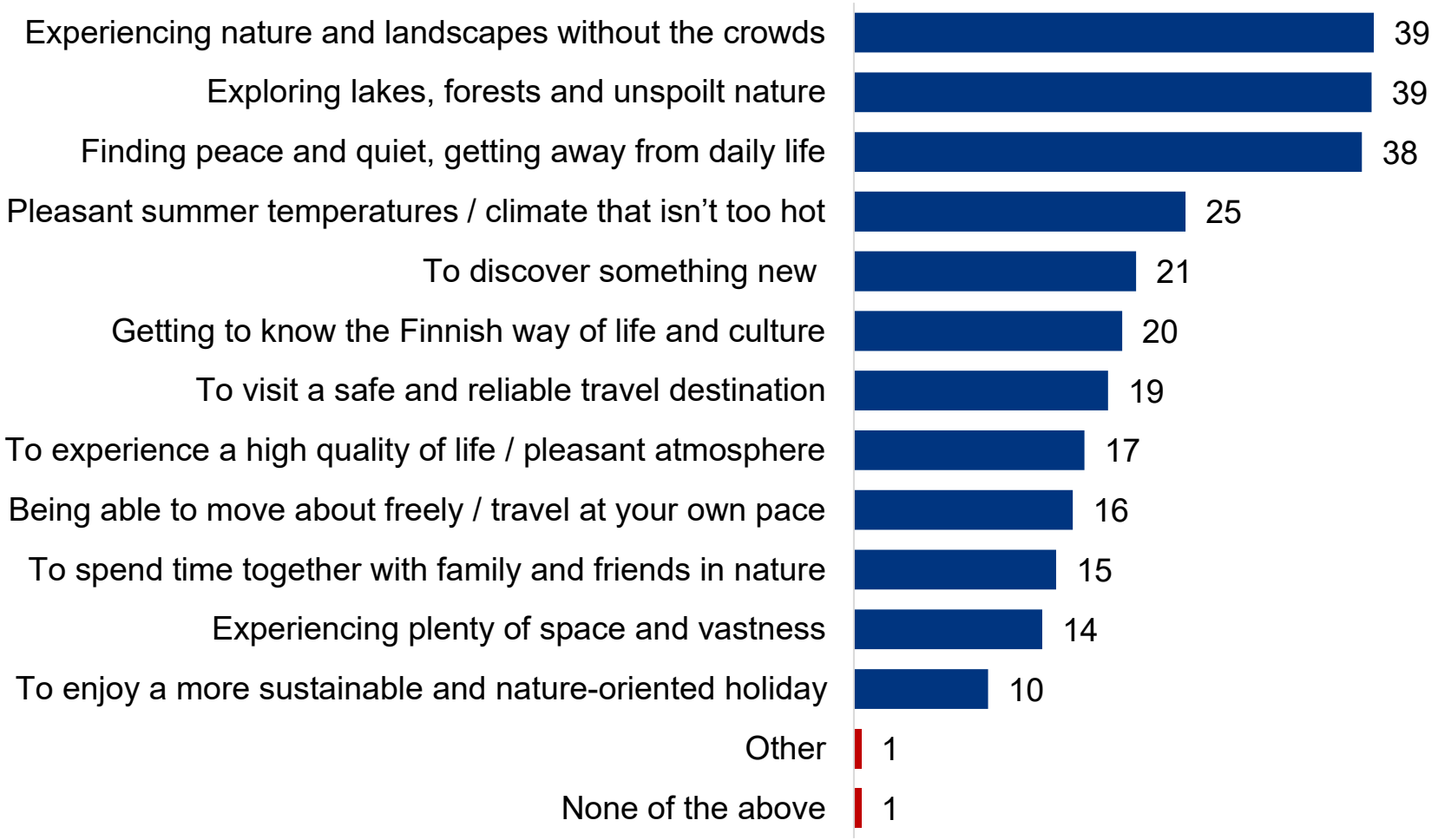
German demand offers potential for longer stays, higher regional dispersion and more experience layers per trip.

2026: How long would you like to stay in Finland for your next holiday?; 2024:
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Decisive factors for summer holidays in Finland

Unspoilt nature and tranquillity in a unique Finnish way are the key draws

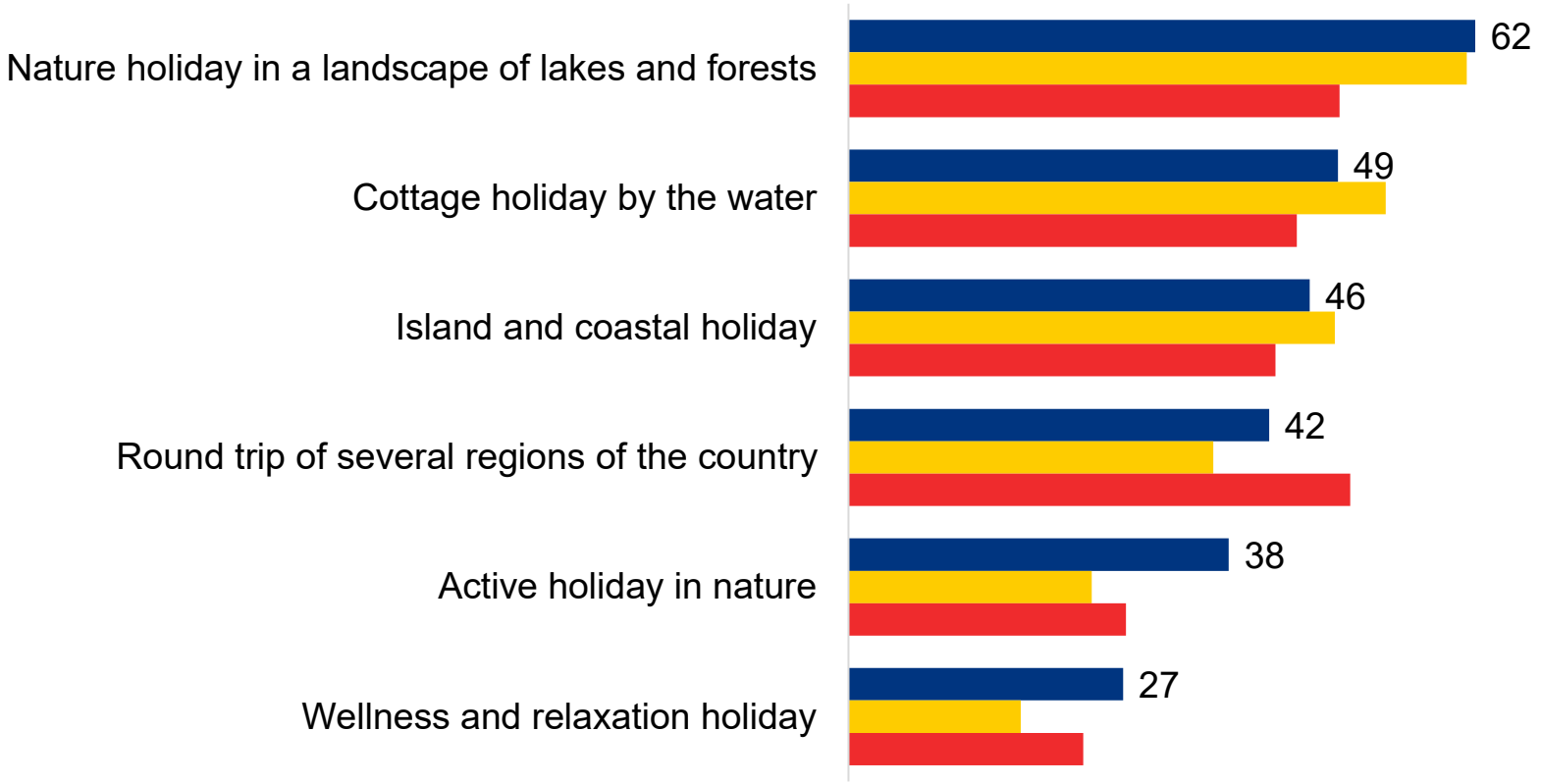


F14: Which of these reasons would be particularly important to you when deciding on a summer holiday in Finland?; in %
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Benchmark: Preferred summer holiday products

Finland's opportunity lies between active nature and relaxation, not in scenery alone



Active nature
Wellness and relaxation

Cottage and waterside summer
Nature and coastal products

Multi-regional touring

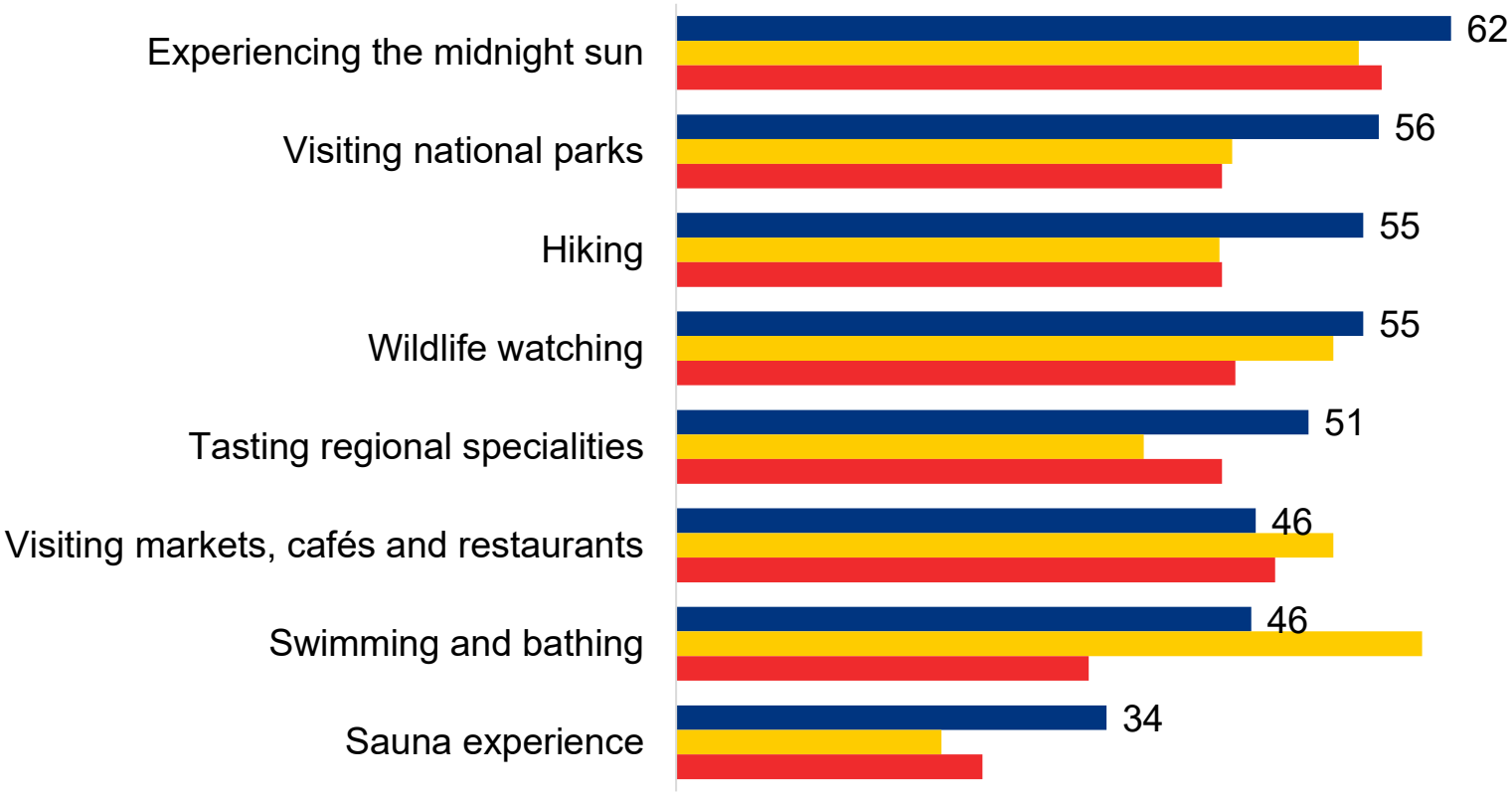
Finland should compete through the combination of active nature, tranquillity and varied experiences.

F7: What type of holiday would you like to experience on a summer trip (i.e. from May to September) to Finland / Sweden / Norway? Please select all that apply.; in %
Basis: Finland Summer Potential (n=570); Sweden Summer Potential (n=99); Norway Summer Potential (n=94);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Proposition | Benchmark: Preferred summer activities

Finnish differentiation comes from experience combinations, not one iconic activity



Potential Strengths:

- Sauna
- National parks
- Hiking
- Regional food
- Activity plus relaxation

Competitive pressure:

swimming, waterside life, cafés and markets

landscape, touring and strong northern associations

The potential Finnish combination: active nature + wellbeing + local culture

F8: What activities would you like to do during your summer holiday (i.e. from May to September) in Finland? Please select all that apply.; in %
Basis: Finland Summer Potential (n=570); Sweden Summer Potential (n=99); Norway Summer Potential (n=94);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Strategic answer 2 | Finland's summer proposition

Finland can stand out through a distinctive combination of nature, tranquillity and local life

Nordic scenery & nature is the entry point, not the differentiator

Forests, lakes, coasts, northern landscapes and outdoor experiences are attractive across the Nordic competitive set.

Finland's strongest combination connects activity and wellbeing

Active nature, national parks and hiking can be combined with space, tranquillity, sauna, regional food and the freedom to travel at one's own pace.

German demand supports complete journeys

The preferred trip combines nature, water, local culture and discovery over approximately eight to fourteen nights rather than focusing on one iconic attraction.

Finland should not compete through scenery & nature alone. It should communicate a specifically Finnish way of experiencing nature: active but unhurried, varied but uncrowded, and closely connected to local life.

© FUR, 2026

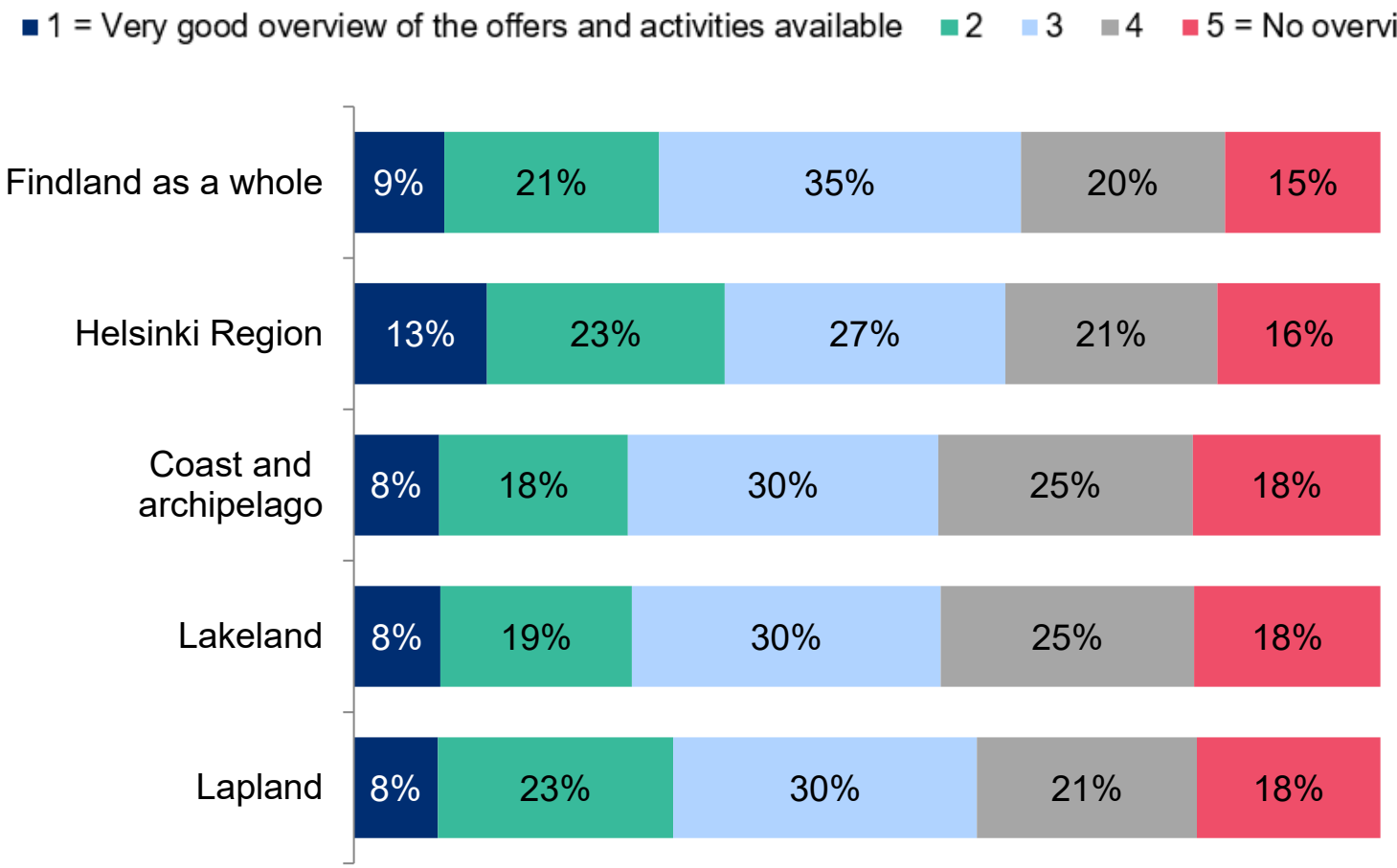


Destination roles

Photo: Therese Andersson / Visit Åland

Destination roles | Awareness of Destinations in summer

Why regional choice requires a different lens …



Findings

- Knowledge of summer attractions is limited overall
- Helsinki Region is somewhat better known
- Coast and Lakeland are less strongly understood
- Many respondents do not have a clear overview of regional activities

Regional names alone are not enough to reveal regional preference.

F15: Do you have any idea what sort of attractions and activities you can expect on a summer holiday in Finland as a whole, and in the various Finnish destinations?
Basis: Finland Potential 2026-2028 (n= 794);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Destination roles | General destination types

Which types attract Germans, which types define Finland, and which types would they actually choose?

Forests & Lakes







Coast & Islands







City & Culture







North & Vastness



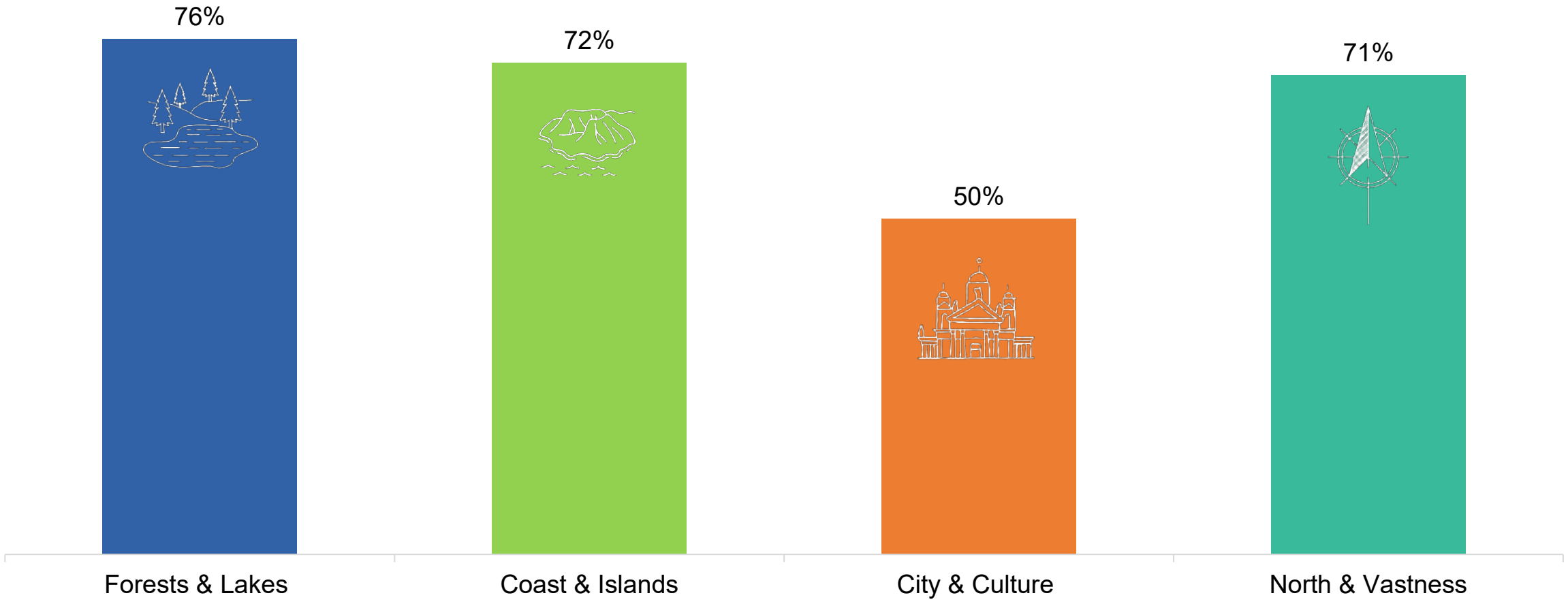




© FUR, 2026

Destination roles | Appeal for summer holidays

Three nature-based destination types command broad summer appeal

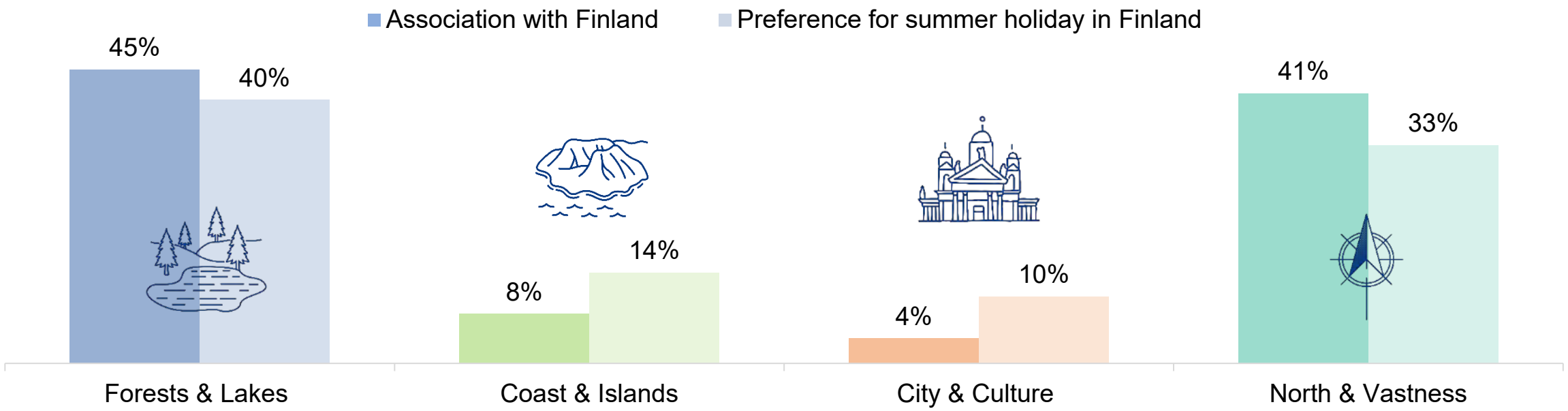


F2: Which of these general destination types generally appeal to you for a summer holiday? (Multiple choice)
Basis: Finland Potential 2026-2028 (n=794)
Source: Finland Ad-hoc-survey 2026

© FUR, 2026

Destination roles | General destination types of Finland

Finland's mental map is dominated by forests, lakes and the North



Personal choice is more diverse than spontaneous association

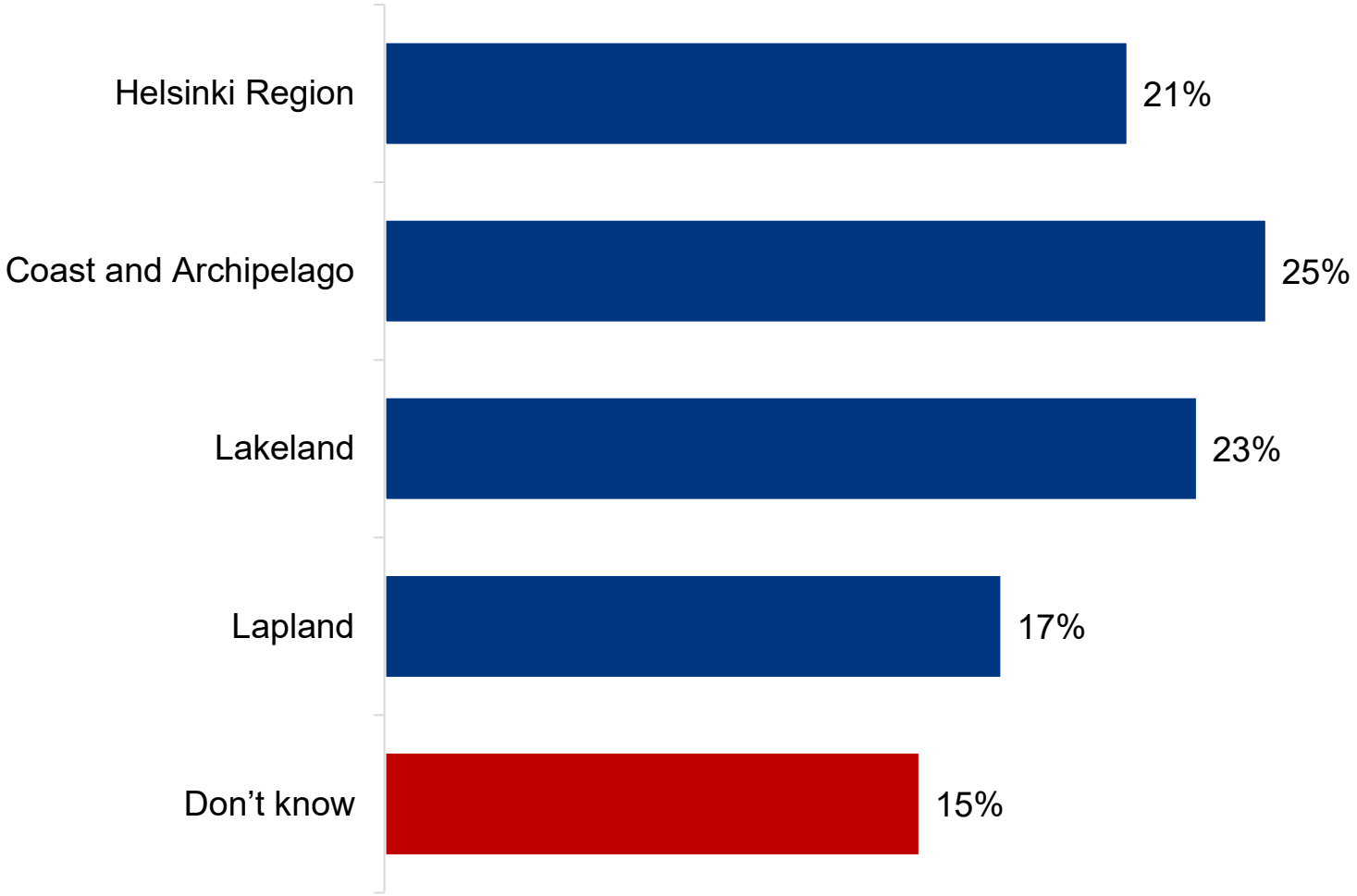
- Forests & Lakes: strong attraction, strong association, strongest choice.
- North & Vastness: strong attraction and association, but somewhat lower choice.
- Coast & Islands: strong attraction, weak Finland association, growing choice.
- City & Culture: more selective attraction, very weak Finland association, but real choice potential

Basis: Finland Potential 2026-2028 (n=794)
Source: Finland Ad-hoc-survey 2026

© FUR, 2026

Destination roles | Interest in Finnish Destinations

No Finnish summer destination dominates, and regional choice remains open …





… and obviously it is not a perfect fit with the destination types …

F16: In which of the following Finnish regions would you like to spend most of your time on a summer holiday in Finland?
Basis: Finland Potential summer travellers (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Destination roles | Types matched with destination choice

Each destination type has a natural, but not very distinct, regional gateway



Forests & Lakes

Helsinki Region	13
Coast and Archipelago	23
Lakeland	32
Lapland	15
Don’t know	16



Coast & Islands

Helsinki Region	18
Coast and Archipelago	43
Lakeland	12
Lapland	7
Don’t know	19



City & Culture

Helsinki Region	69
Coast and Archipelago	9
Lakeland	8
Lapland	5
Don’t know	9



North & Vastness

Helsinki Region	16
Coast and Archipelago	23
Lakeland	21
Lapland	28
Don’t know	12

Basis: Finland Potential summer travellers (n=570); Forest & Lakes (n=235), Coast & Island (n=83); City & Culture (n=65); North & Vastness (n=179)
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Destination roles | What fits clearly, and what remains open?

The destination types provide regional leads, but not exclusive matches

Clear

- City & Culture links strongly to Helsinki.
- Coast & Islands links clearly to Coast and Archipelago.
- Forests & Lakes gives Lakeland a lead.
- North & Vastness gives Lapland a lead.

Less clear

- The nature destination types overlap strongly.
- North & Vastness also leads towards Coast and Lakeland.
- Forests & Lakes does not belong exclusively to Lakeland.
- Coast has high general appeal but weak spontaneous association with Finland.
- Fifteen percent still do not choose a region.



What does that mean for the Finnish destinations?

© FUR, 2026

Destination roles | Type of holiday and destination types






	Forests & Lakes	Coast & Islands	City & Culture	North & Vastness
Nature holiday in a landscape of lakes and forests	69	57	26	72
Cottage holiday by the water	58	55	26	43
Island and coastal holiday	38	76	31	48
Round trip of several regions of the country	39	41	40	47
Active holiday in nature	36	27	15	55
Round trip of several Nordic countries	27	31	42	35
Wellness and relaxation holiday	27	31	26	27
City trip	17	36	75	20
Family holiday	24	24	20	22
Cultural holiday	14	18	46	16

Basis: Finland Potential summer travellers (n=570); Forest & Lakes (n=235), Coast & Island (n=83); City & Culture (n=65); North & Vastness (n=179)
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Destination roles | Type of holiday and destination types

Holiday products sharpen the destination types

What type of holiday would you like to experience on a summer trip (i.e. from May to September) to Finland?

Forest & Lakes



Nature

Cottage

Water

Coast & Islands



Coast

Swimming

Boats

Cycling

City & Culture



City

Culture

Nordic touring

North & Vastness



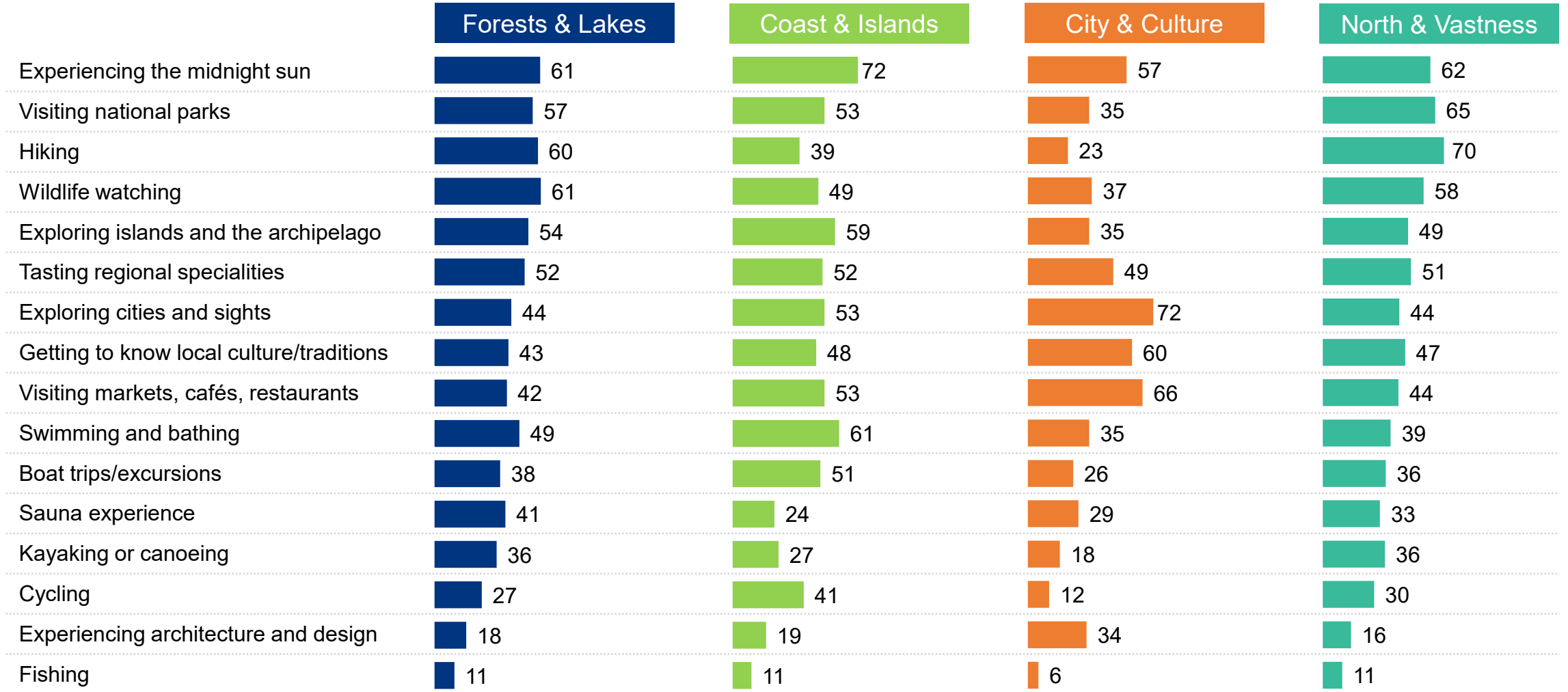
Active Nature

Hiking

Multi-Regional touring

© FUR, 2026

Preferred summer activities matched with destination types



Basis: Finland Potential summer travellers (n=570); Forest & Lakes (n=235), Coast & Island (n=83); City & Culture (n=65); North & Vastness (n=179)
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Destination roles | Summer activities and destination types

Activities turn destination types into experiences

What activities would you like to do during your summer holiday (i.e. from May to September) in Finland?

Forest & Lakes



Wildlife Watching

Hiking

Sauna

Canoeing

Coast & Islands



Swimming

Exploring the Archipelago

Boat trips

Cycling

City & Culture



Exploring the City

Experiencing Culture

Visiting Cafés

Architecture and Design

North & Vastness



Hiking

Visiting National Parks

Wildlife Watching

Experiencing the Midnight Sun

© FUR, 2026

Strategic answer 3 | Destination roles

The destination types provide regional leads, but not exclusive matches

Each destination type has a natural, but not very distinct, regional lead

- Forests & Lakes gives Lakeland the strongest position.
- Coast & Islands leads most clearly to Coast and Archipelago.
- City & Culture strongly directs travellers towards Helsinki.
- North & Vastness gives Lapland a lead.

The nature-based destination types overlap considerably

Lakeland, Coast and Lapland compete for parts of the same nature-oriented demand.
Travellers do not assign all landscapes and experiences exclusively to one Finnish region.
Overlap can also create opportunities for cooperation

Regional interest remains open

No destination dominates overall summer choice, regional knowledge is limited
and a relevant share of potential visitors remains undecided.

The destinations do not need separate markets. They need recognisable cores, complementary experience portfolios and clearer roles within one shared Finnish summer proposition.

© FUR, 2026

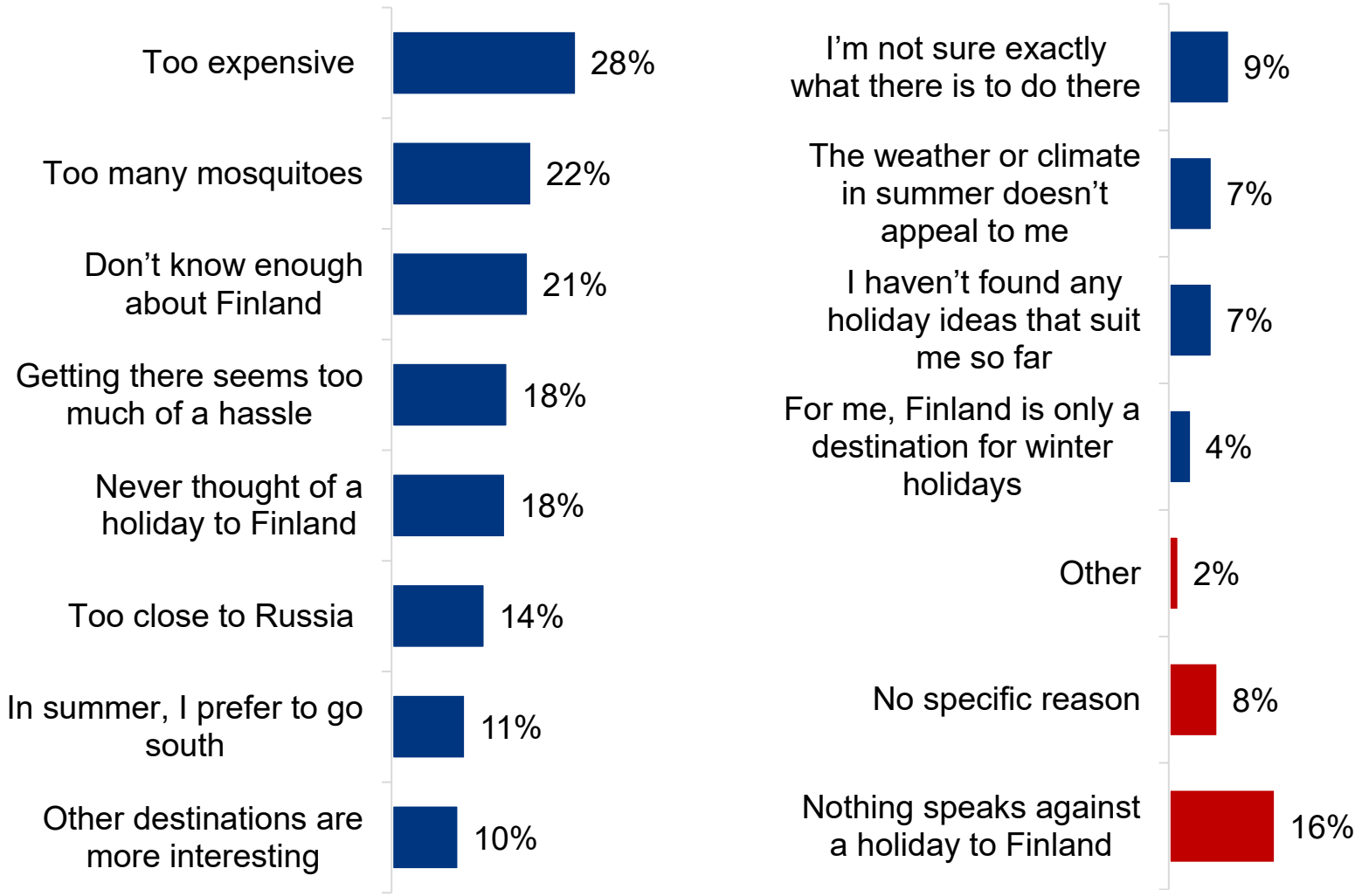
Conversion



Photo: Harri Tarvainen / Visit Finland

Conversion | Finland-Barriers

No single barrier explains the conversion gap



Looking back and deeper

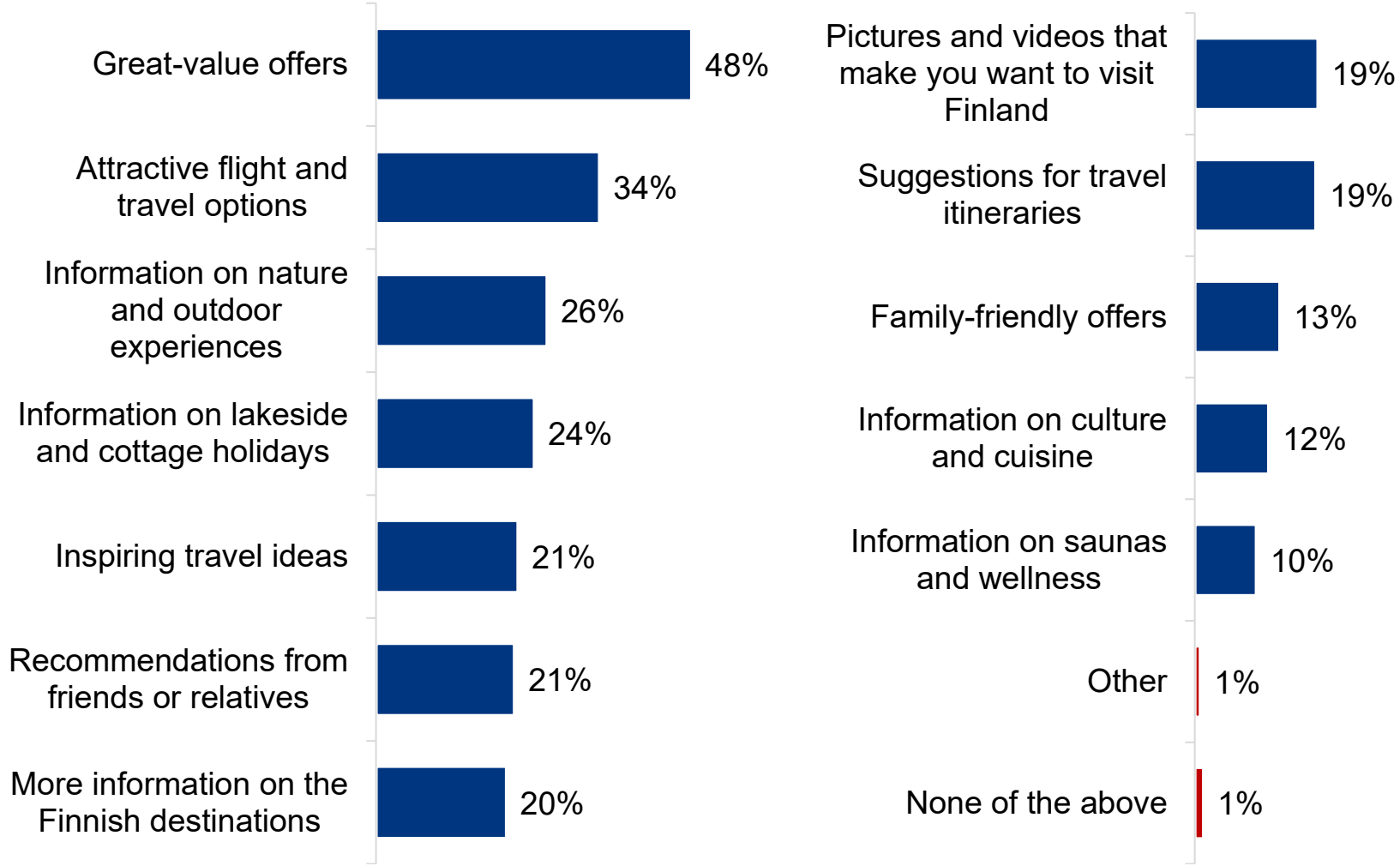
- **Comparison over time**
  Price remains the main barrier, but has become less important since 2024. Lack of information, a lack of suitable holiday ideas and mosquitoes have become more important.
- **Summer vs. overall potential**
  Summer and overall potential show very similar barriers.
- **Interested vs. not interested**
  Those not interested are less likely to consider Finland as a holiday destination and know less about the country.

F12: What speaks against a summer holiday in Finland (i.e. a trip between May and September) from your point of view?
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Conversion | Appealing aspects for a summer in Finland

Price and access matter, but concrete holiday ideas are the actionable lever



Looking deeper

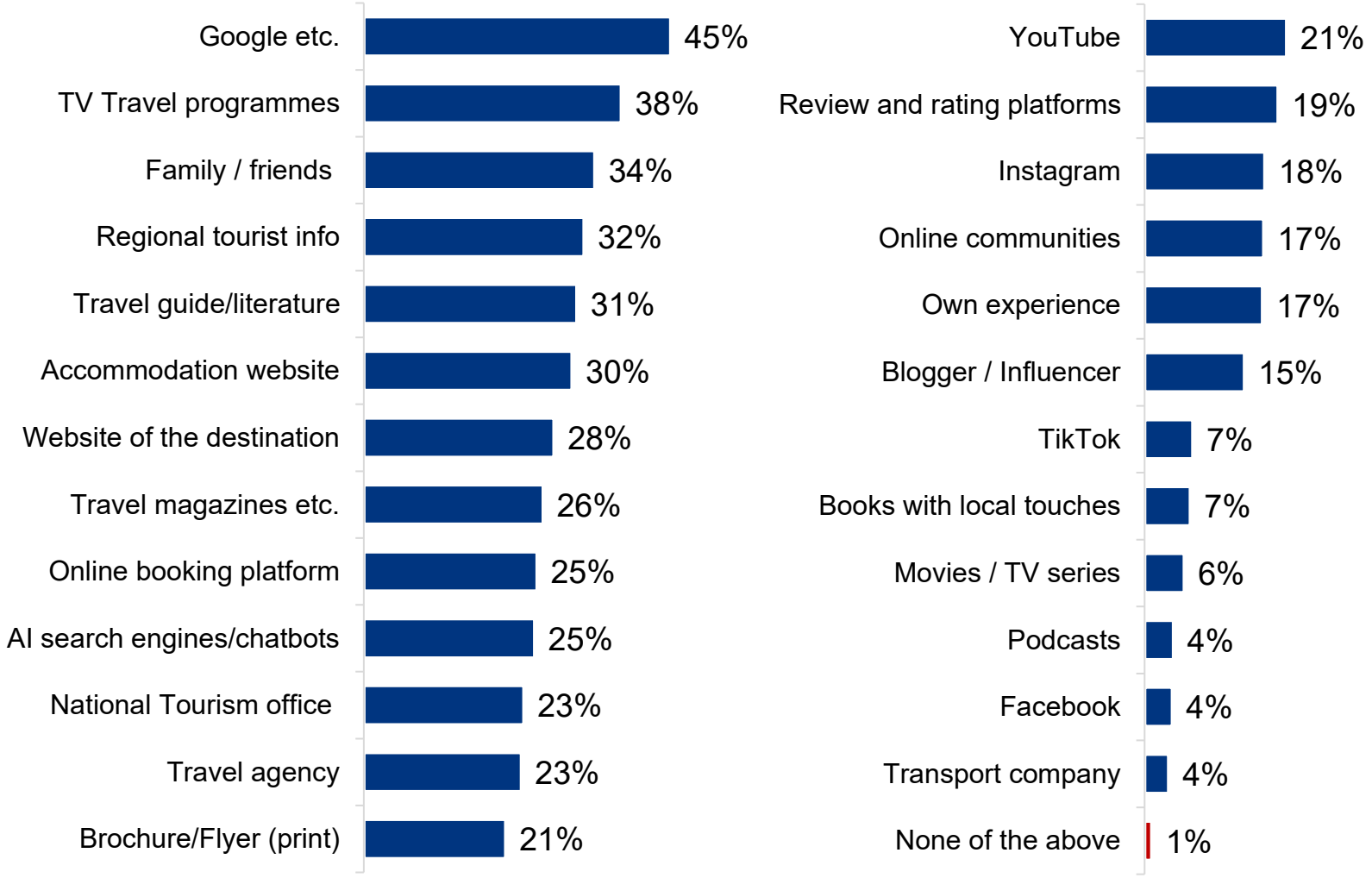
- **Summer vs. overall potential**
  Appealing aspects are similar, with slightly more interest in nature and cottage holidays among the summer potential.
- **Interested vs. not interested**
  There is little difference between those who are interested in travelling to Finland and those who are not. Information on lakeside and cottage holidays do have an even higher appeal to those not interested to travel to Finland.

F13: Which of the following aspects would make a summer holiday (i.e. a trip between May and September) in Finland particularly appealing to you? Please select a maximum of 3 answers.
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Conversion | Inspiration and information

Search, editorial inspiration and trusted websites shape the planning process



Looking back

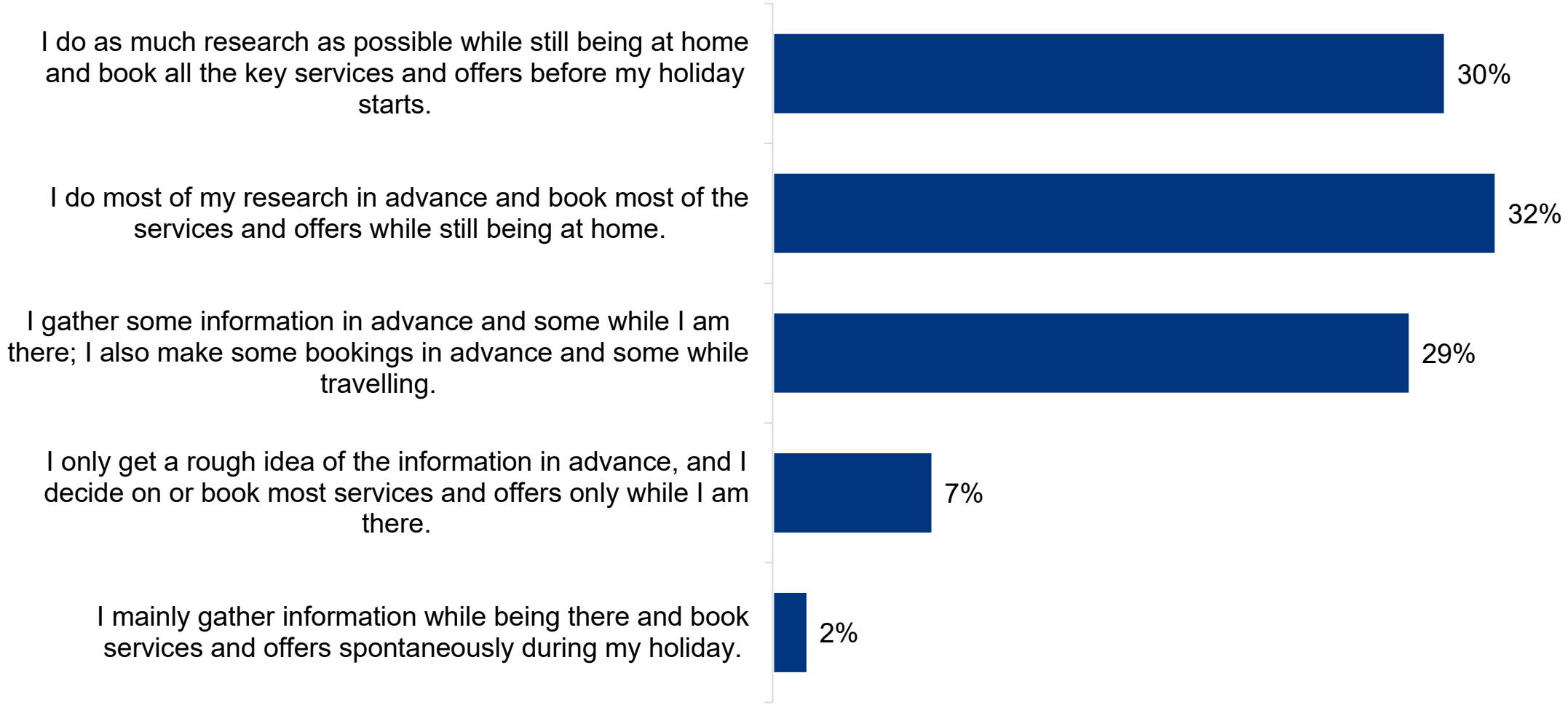
- Search engines remain the top source.
- TV travel programmes, accommodation websites and online communities gain importance.
- Online booking platforms and travel agencies decline.
- AI search engines and chatbots are new in the item set and are already relevant for a quarter of the Finland summer potential.

F10: Which of these media/information sources would you like to use to plan your upcoming summer holiday in Finland? (Multiple choice)
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Conversion | Booking pattern for summer activities in Finland

Most summer activities must be visible and bookable before departure



F13a: Which of the following statements best describes how you plan and book activities for a summer holiday in Finland?
Basis: Finland Summer Potential (n=570);
Source: Finland Ad-hoc-survey 2026 by FUR/NIT

© FUR, 2026

Strategic answer 4 | Conversion

Interest becomes choice when Finnish journeys are concrete, easy to plan and bookable

There is no single dominant rejection barrier

Price and access matter, but limited knowledge, unclear holiday ideas and uncertainty about what to do also hinder conversion. Many potential visitors have no fundamental objection to Finland.

Inspiration must become practical orientation

Search engines, editorial content, recommendations, destination websites and accommodation providers all shape planning. Travellers need routes, durations, transport information and clear regional orientation across these channels.

Products must be visible before arrival

Almost two thirds prefer to plan and book all or most important activities before departure.
Another substantial group combines advance booking with decisions during the trip.

Finland has a competition and conversion challenge more than a rejection problem.
Strong imagery must be connected to concrete itineraries, transparent product information and seamless advance booking.

© FUR, 2026

Strategic Synthesis



Photo: Franny Plumridge / Visit Finland

Synthesis 1 | The German market opportunity

Germany can support balanced growth, if Finland converts potential into suitable journeys

Stable but competitive demand

German travel demand remains strong, but Finland competes with Sweden, Norway and established summer destinations.

Summer and longer stays

German demand offers potential for summer growth and trips of approximately eight to fourteen nights.

One Finnish proposition

Nature, space and quality of life without overcrowding connect activity, tranquillity, water and local life.

Regional distribution

Interest extends across all four destination areas, creating potential for individual destinations and multi-regional journeys.

The opportunity is not simply to attract more German visitors,
but to turn Finland's shared appeal into distinctive reasons to choose and travel.

© FUR, 2026

Synthesis 2 | From national promise to destination delivery

Destination roles become effective when translated into complete and bookable journeys

Four destination roles

- **Finnish Lakeland**: Versatile lakeside nature
- **Coast and Archipelago**: Maritime discovery
- **Helsinki Region**: Urban and cultural gateway
- **Lapland**: Active/accessible northern wilderness

Four delivery requirements

- **Recognisable role**: A clear reason to choose the destination.
- **Rich experience combination**: A distinctive core complemented by food, culture, wellbeing or activity.
- **Complete journey**: Accommodation, experiences, mobility and realistic length of stay connected.
- **Clear and bookable market presence**: Practical information and key elements available before departure.

The strategic opportunity lies in combining national relevance with regional choice: one Finnish summer promise, four complementary destination roles and journeys that travellers can understand, plan and book

© FUR, 2026

Destination Coast & Archipelago

Coast & Archipelago | Demand profile

Opportunity in longer journeys combining coastal nature, islands and local life

Product and motivation

- **62%** are interested in island and coastal holidays.
- **68%** are interested in nature holidays in lakes and forests.
- **62%** would like to explore islands and the archipelago.
- **69%** are interested in experiencing the Midnight Sun.
- Uncrowded nature, tranquillity, safety and quality of life complement the maritime appeal

Travel pattern

- **46%** prefer 8-10 nights
- **36%** prefer 11-14 nights
- A further **11%** prefer 15-21 nights

Segments / Demography

- **57% Nature Lovers**
- **31% Lifestyle Travellers**
- **11% Outdoor Explorers**
- The demographic profile is broad, with couples, families and older travellers all represented.

The Coast audience is not defined by one narrow demographic or segment.
The common denominator is interest in a varied coastal journey with sufficient content for a longer stay.

© FUR, 2026

Coast & Archipelago | Strategic opportunity

The data suggest combining maritime nature, movement and local coastal life

Maritime nature	Movement and discovery	Local life
Islands and archipelago	Island hopping	Small towns
Coastal landscapes	Cycling	Regional food
Swimming and boating	Multi-stop routes	Cafés & markets
Peace and uncrowded nature		Culture, history & Maritime traditions

“Maritime discovery”: Finland experienced through islands, routes, coastal communities and local life. Active products can enrich this role, but the relatively small Outdoor Explorer segment suggests that activity alone should not define the proposition.

© FUR, 2026

Coast and Archipelago | Marketing and conversion ideas

Coastal appeal needs translation into connected, comprehensible and bookable journeys

Structure the journey

- Show realistic multi-day routes rather than isolated destinations.
- Connect islands, coastal towns and gateways.
- Provide different route options for different lengths of stay.

Make mobility understandable

- Explain ferry connections, road links and cycling stages.
- Show realistic travel times and transfer options.
- Make the relationship between gateways and coastal destinations transparent.

Support planning and booking

- Connect accommodation, transport and activities.
- Strengthen destination and accommodation websites as conversion channels.
- Provide key information before departure.

Address specific information gaps

- Explain clearly what visitors can actually do along the route.
- Reduce perceived complexity of travelling through the region.
- Turn high general coastal appeal into specifically Finnish travel ideas.

The data point less to an inspiration gap than to an orientation gap:
the coastal journey needs to become easier to understand, combine and book.

© FUR, 2026

Destination Helsinki Region

Helsinki Region | Demand profile

Distinctive urban and cultural audience, but nature remains part of the opportunity

Product and motivation

- **59%** are interested in a city holiday.
- **35%** are interested in a cultural holiday.
- **66%** want to explore cities and sights.
- **61%** want to visit markets, cafés and restaurants.
- **29%** are interested in architecture and design.
- **31%** describe Finnish life and culture as an important reason for choosing Finland.

Travel pattern

- **41%** prefer 4–7 nights.
- **41%** prefer 8–10 nights.
- Only **19%** prefer 11–14 nights.

Segments / Demography

- **53% Nature Lovers**
- **33% Lifestyle Travellers**
- **9% Outdoor Explorers**
- **36%** are aged 18–34.
- **31%** live in single-person households.

Helsinki has the clearest urban and lifestyle-oriented profile. However, Nature Lovers remain the largest segment, indicating potential for city, coast and accessible nature combinations.

© FUR, 2026

Helsinki Region | Strategic opportunity

Finnish urban life AND access to wider Finland

Cultural immersion

Food, cafés and markets

Culture and local life

Design and architecture

Sauna and wellbeing

City plus nature

Islands and coastline

Accessible green spaces

Nearby nature experiences

Easy urban-to-nature combinations

Gateway and touring

Starting point/finale of a longer Finland trip

Connection to Coast and Lakeland

Finnish and Nordic touring

City experience as an introduction to different versions of Finland

A possible role is “Urban and cultural gateway”: a distinctive Finnish city experience that works both as a destination in its own right and as an entry point to coast, nature and wider Finland.

© FUR, 2026

Helsinki Region | Marketing and conversion ideas

Different product pathways towards city breaks, longer stays and wider Finland journeys

Strengthen the city proposition

- Translate food, design, culture and local life into concrete short-break products.
- Provide clear reasons to stay beyond the obvious highlights.
- Make distinctive Finnish experiences easy to find and book.

Enable city-plus-nature combinations

- Show how easily coast, islands, nearby nature can be added.
- Create clear one- or two-night extension options.
- Explain transport, duration and activity level.

Facilitate onward journeys

- Develop visible Helsinki-plus itineraries.
- Connect Helsinki with Coast and Lakeland particularly clearly.
- Combine transport, accommodation and activity information.

Reach travellers during planning

- Use strong searchable and visual content.
- Consider the comparatively high relevance of YouTube, Instagram and AI-supported planning among Helsinki-preferring travellers.
- Lead inspiration directly towards concrete itinerary options.

The conversion task is not simply to extend every city break, but to make several clear journey pathways visible: Helsinki only, Helsinki plus nature, or Helsinki as part of a wider Finland trip.

© FUR, 2026

Destination Lapland

Lapland | Demand profile

Lapland's summer potential is led by Nature Lovers, with additional opportunities

Product and motivation

- space and vastness,
- tranquillity,
- freedom to travel individually,
- uncrowded nature,
- hiking and national parks,
- wildlife and the Midnight Sun

Segments

- **63% Nature Lovers**
- **17% Outdoor Explorers**
- **19% Lifestyle Travellers**

Nature Lovers are around nine percentage points more prominent than among the other regional groups, while Lifestyle Travellers are less prominen

Demography

- **34%** are aged 18–34.
- **45%** are aged 35–54.
- Only **21%** are aged 55 or older.
- **30%** live in households with children.
- **46%** report household incomes of at least €4,000

The potential market is broader and somewhat younger than a purely 50+ self-drive profile.
These data describe future potential, however, not the structure of current German guests.

© FUR, 2026

Lapland | Strategic opportunity

Accessible nature immersion AND active northern experiences

Accessible nature immersion

Uncrowded landscapes and vastness

Peace and tranquillity

Wildlife

Midnight Sun

Freedom and individual travel

Active northern experiences

Hiking and national parks

Mountain biking and gravel

Trail running

Canoeing and water activities

Multi-day outdoor products

Specialist events

Northern local life

Regional food

Sauna and wellbeing

Local culture and history

Human encounters

Sámi culture

“Active northern wilderness” remains a plausible umbrella role,
but the largest opportunity does not consist solely of highly active travellers.
Accessibility, tranquillity and quality are likely to be central to the broader Nature Lover market.

© FUR, 2026

Lapland | Marketing and conversion ideas

Strong northern imagery to lead to accessible, well-explained, bookable summer products

Make summer experiences tangible

- Show concrete multi-day itineraries rather than abstract wilderness.
- Explain what visitors actually do each day.
- Combine nature, accommodation and selected activities into realistic stays.

Make accessibility transparent

- Explain how to get there and move within the region.
- Provide duration, difficulty and equipment information.
- Offer clearly graded options from easy nature immersion to demanding outdoor activities.

Create different product pathways

- Accessible nature and wellbeing for Nature Lovers.
- More demanding outdoor products and events for Outdoor Explorers.
- Easy and safe nature experiences for families.

Convert editorial inspiration

- Use travel documentaries, travel literature and destination information to build confidence.
- Connect inspirational northern imagery directly to concrete product pages.
- Make guided activities and important trip elements bookable before departure.

Lapland does not need to make summer nature more spectacular. The opportunity is to turn its strong northern image into concrete journeys that work for both nature immersion and active exploration.

© FUR, 2026

Destination Lakeland

Lakeland | Demand profile

Lakeside nature, active experiences and space for longer stays

Product and motivation

- **74%** are interested in nature holidays in lakes and forests.
- **65%** are interested in cottages by the water.
- **50%** value nature and landscapes without crowds.
- **48%** are particularly attracted by lakes, forests and unspoilt nature.
- Swimming, hiking, canoeing and cycling are all comparatively strong interests.

Travel pattern

- **38%** prefer 8–10 nights.
- **38%** prefer 11–14 nights.
- A further **11%** prefer 15–21 nights.

Demography / Segments

- **51% Nature Lovers**
- **28% Lifestyle Travellers**
- **18% Outdoor Explorers**
- The demographic profile is broad, with a slight emphasis on middle-aged travellers and two-person households.

Lakeland's demand profile is broader than a traditional cottage holiday: water and tranquillity provide the core, while active nature, food, culture and regional discovery can add variety and support longer stays.

© FUR, 2026

Lakeland | Strategic opportunity

Combining relaxing lakeside nature with activity and regional discovery

Lakeside immersion

Lakes and forests

Cottages by the water

Swimming and sauna

Peace and uncrowded nature

Active nature

Hiking and national parks

Canoeing and kayaking

Cycling

Wildlife and outdoor experiences

Regional discovery

Regional food

Towns and cultural attractions

Local history, design and craft

Different landscapes and places within Lakeland

A possible role is “Versatile lakeside nature”: lakes and cottages provide the emotional core, while active nature and regional discovery create variety and reasons to stay longer.

© FUR, 2026

Lakeland | Marketing and conversion ideas

Make Lakeland's variety and regional journey options more visible

Expand the mental picture

- Present the cottage as a base rather than the complete holiday.
- Show how nature, outdoor activities, food and culture can be combined.
- Demonstrate different ways of experiencing Lakeland.

Structure longer journeys

- Develop clear multi-day itineraries.
- Connect several places and subregions.
- Offer different levels of activity within the same journey.

Make mobility understandable

- Explain arrival options and movement within Lakeland.
- Provide realistic distances and travel times.
- Show how individual destinations complement one another.

Support advance planning

- Connect accommodation and activities.
- Strengthen destination and accommodation websites.
- Provide concrete information on lakeside holidays and nature experiences.
- Address the comparatively high perception that access can be complicated.

Lakeland already has a strong demand fit. The conversion task is to demonstrate how much more a lakeside holiday can include and how easily these experiences can be combined into one journey.

© FUR, 2026



Institut für Tourismus- und Bäderforschung
in Nordeuropa GmbH (NIT)

Fleethörn 23, D-24103 Kiel

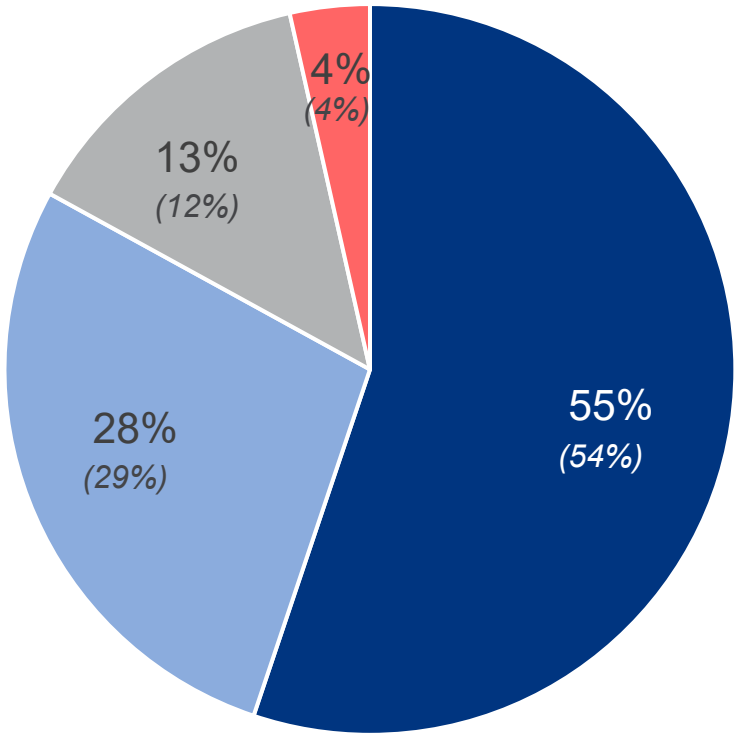
E-Mail: info@nit-kiel.de
Phone: +49 431 666567 0

Ulf Sonntag (ulf.sonntag@nit-kiel.de)

Photo: Marko Junttila / Visit Finland

Visit-Finland-Segments

More than 50% of potential guests identify with the Nature Lover segment



- **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= 794);
Source: Finland Ad-hoc-survey 2026 and 2024 by FUR/NIT

© FUR, 2026