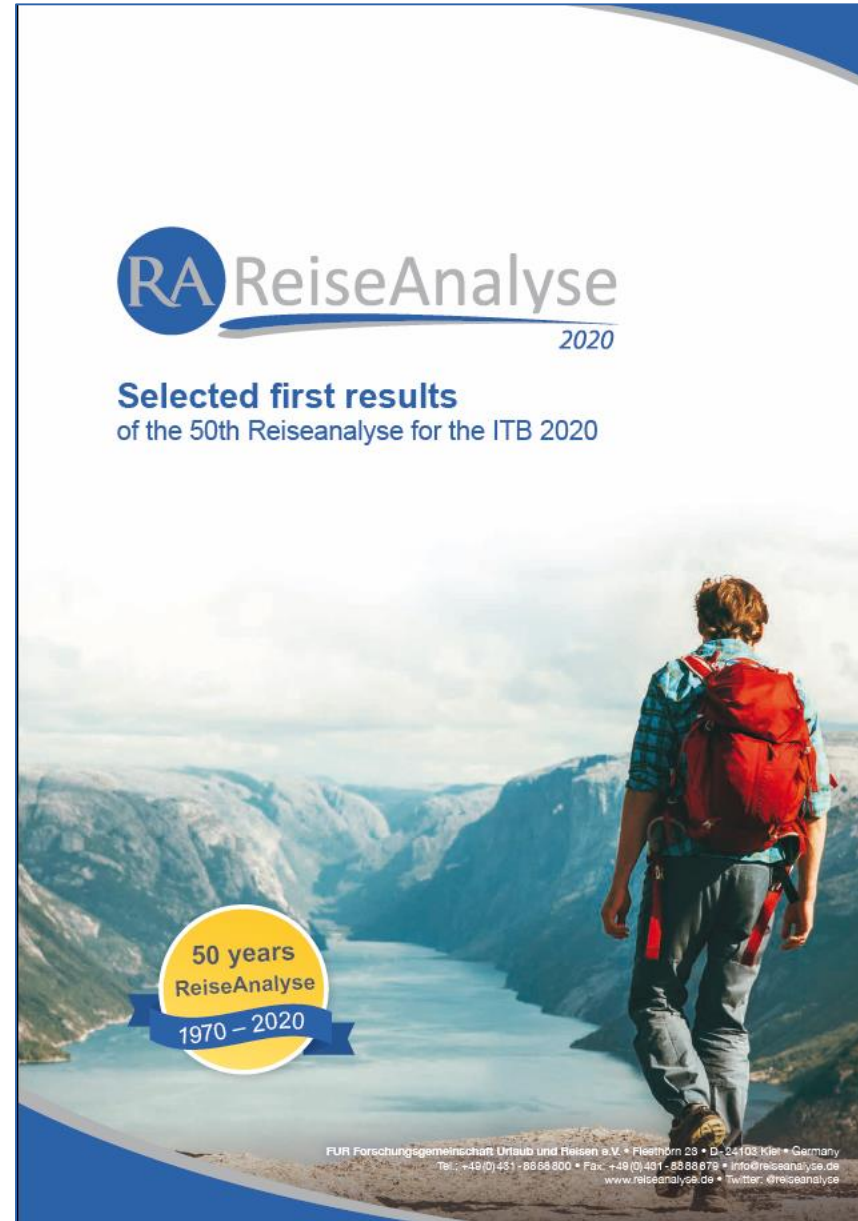


Greta + Germany = Growing demand for sustainable travel?

Trends with the
German holiday travellers

Helsinki 11/03/2020
Ulf Sonntag, NIT/FUR

Basis ONE: RA 2020 First results





Positioning and potentials of Finland on the German holiday travel market

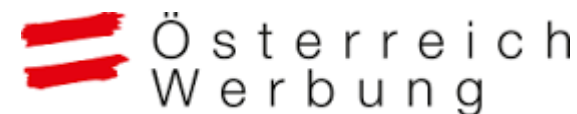
Report for  **Visit Finland**

Presentation Helsinki 13/08/2019
Author: Ulf Sonntag, NIT/FUR





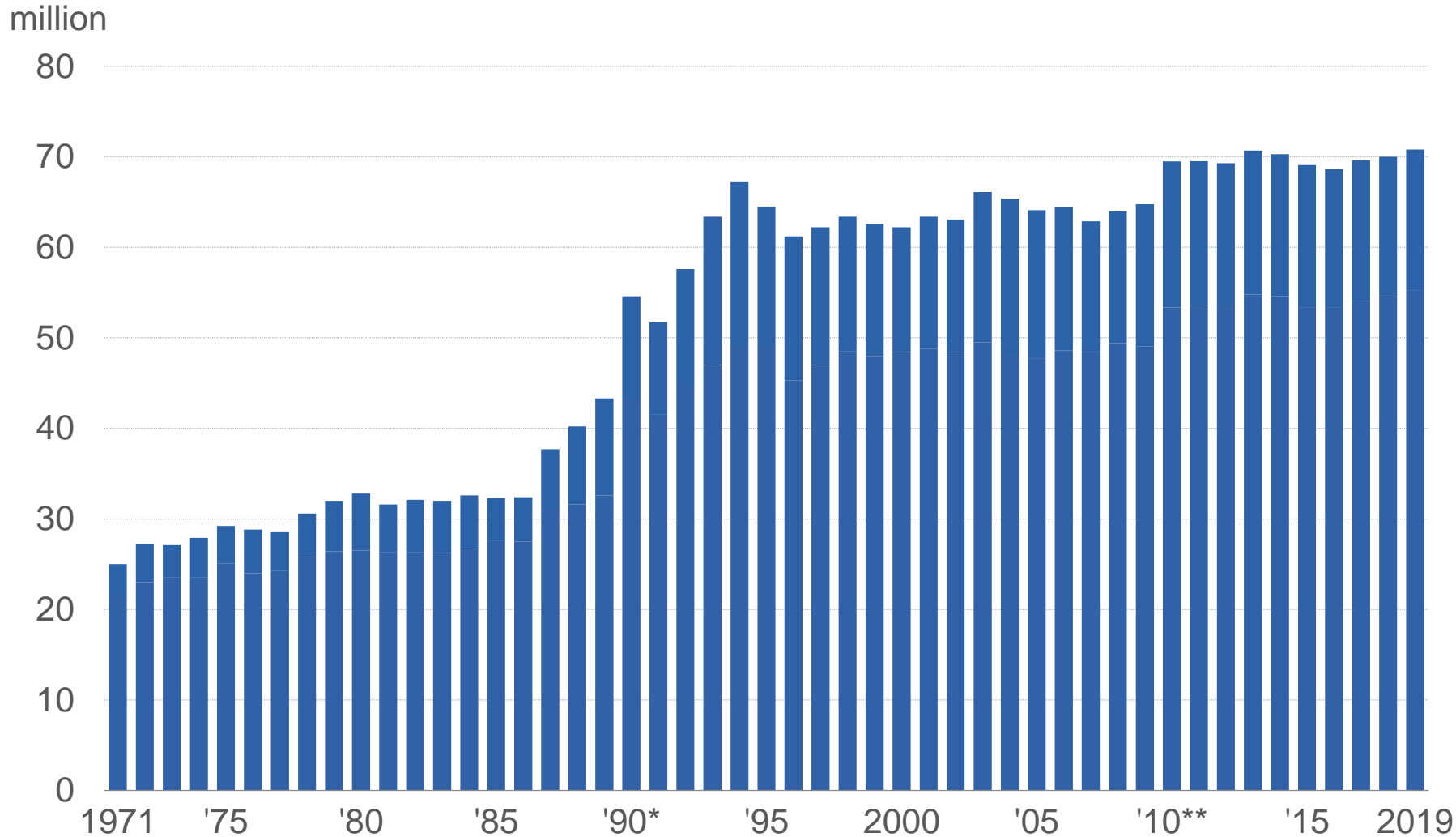
- » Holiday demand of the Germans
- » Annually since 1972
- » 8,000 interviews face-to-face plus 5,000 interviews online
- » Multi-client
- » Non-profit association



How do the Germans travel? Is there a „Greta-Effect“?



Volume of holiday travel: Stability on a very high level



71 million
holiday trips (5+ days)

55 million
holiday travellers

73 billion €
holiday spending

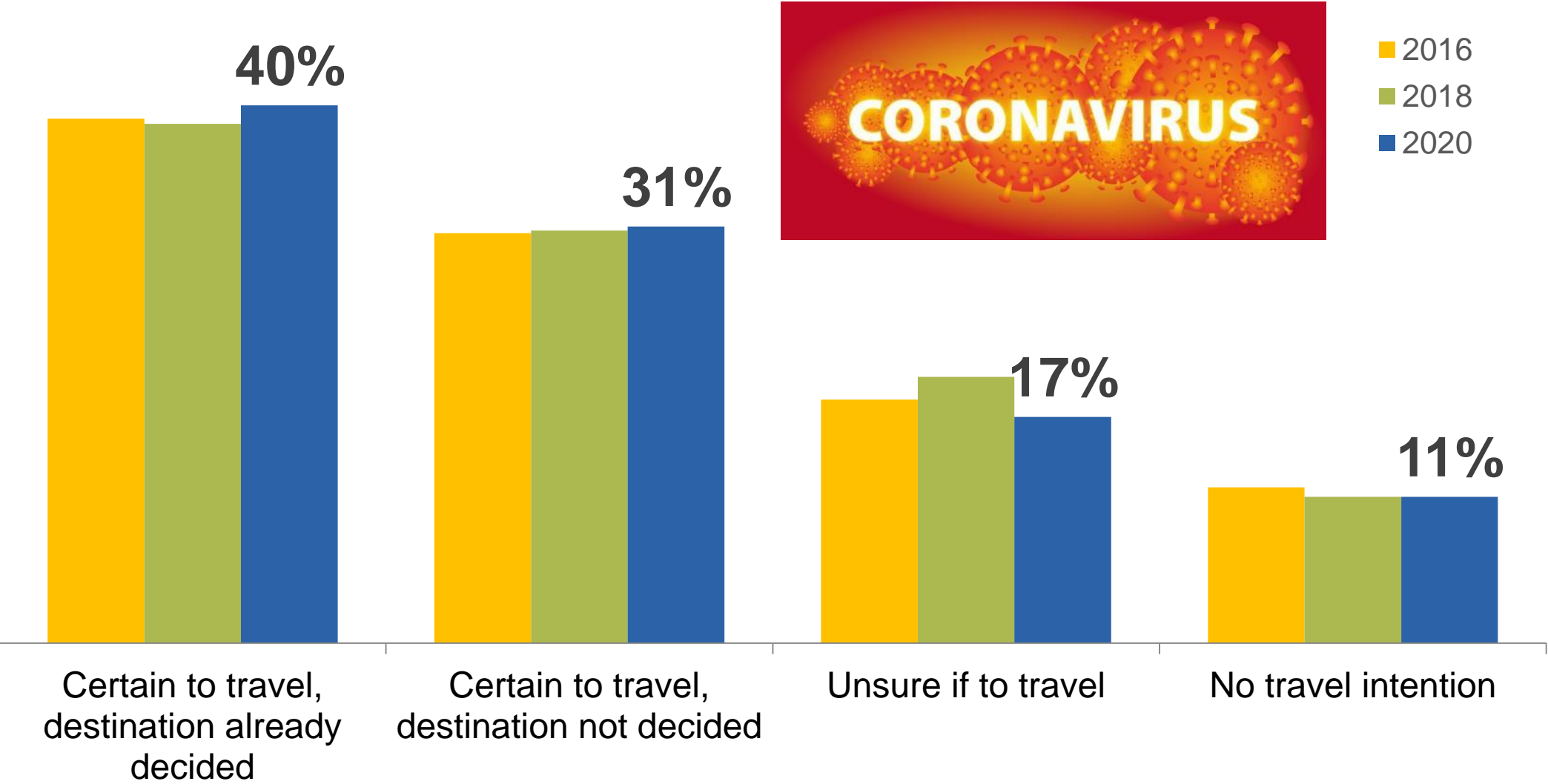
Basis: holiday trips of 5 days or more of the German-speaking population aged 14 and over in Germany

* From 1990 incl. holiday trips of the East German population; ** From 2010 incl. holiday trips of German-speaking foreigners

Source: RA 1971-2020



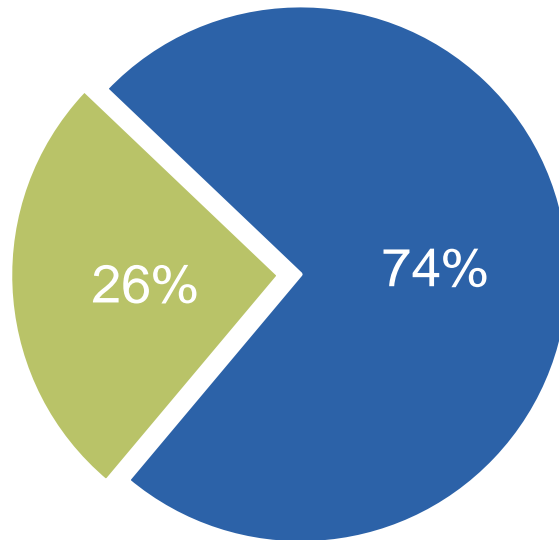
Intention to travel: Positive outlook for 2020



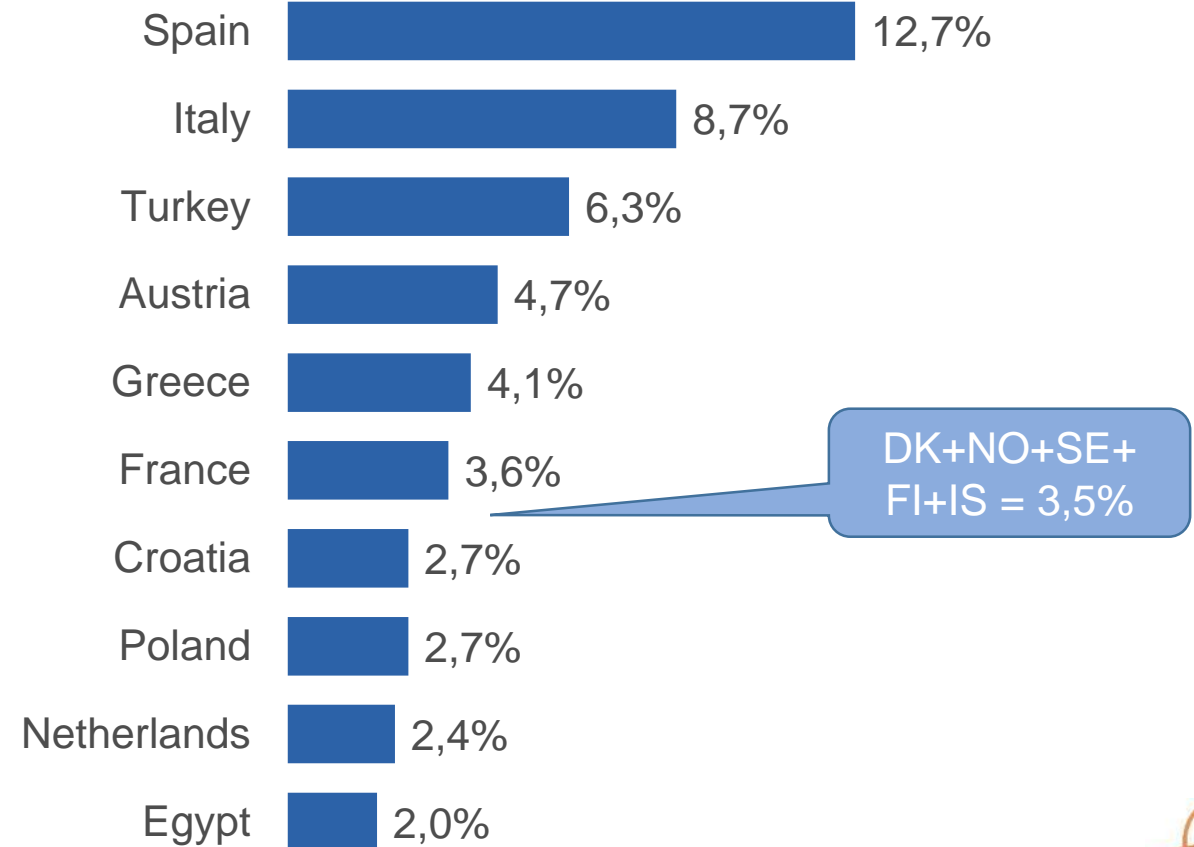
Holiday destinations 2019:

New record for international travel

71 million
holiday trips (5+ days)

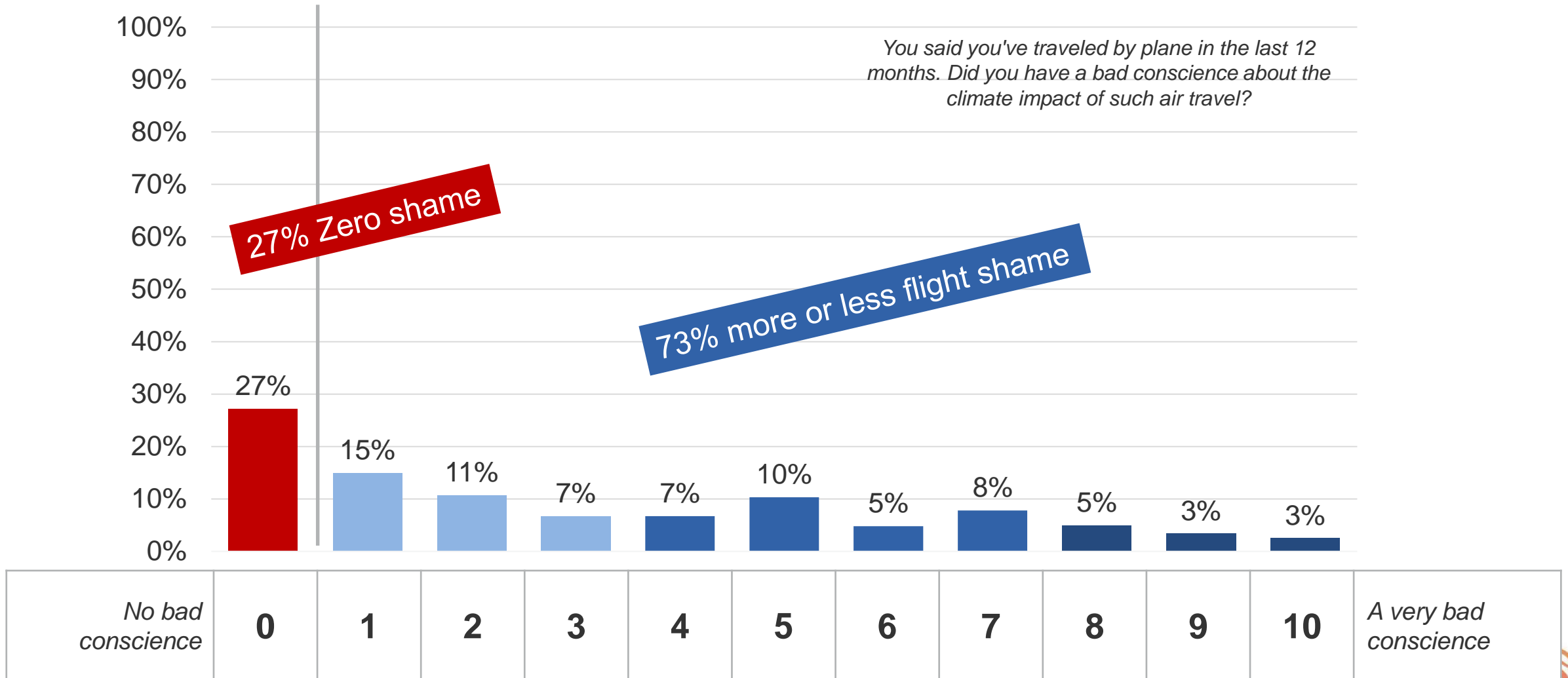


■ Germany ■ Abroad

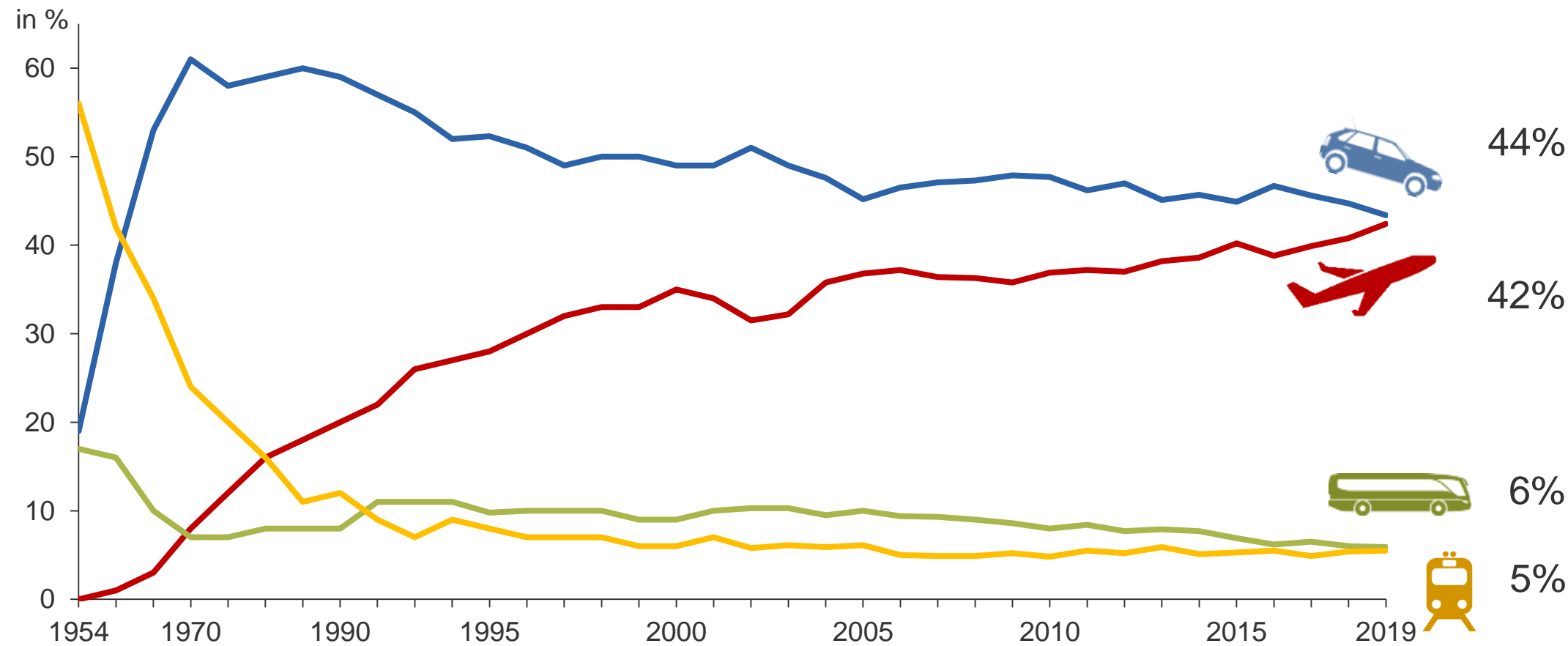


Flygskam:

Most people have a somewhat bad conscience about flying



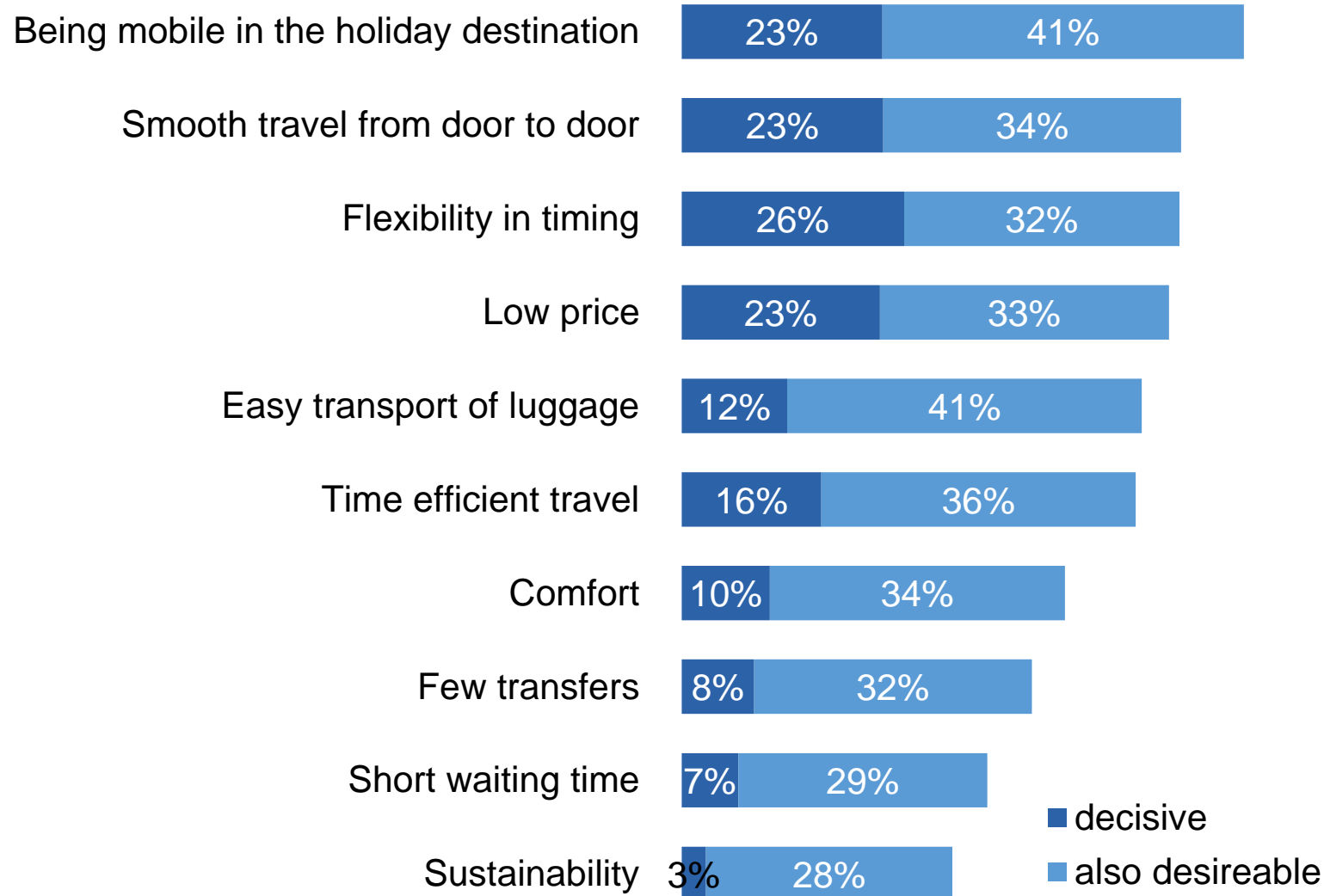
Means of transport for long holiday trips: Air travel at record level



Basis: holiday trips (5 days or more), figures in %, "car" incl. caravan and camper van/ minibus;
German population aged 14 and over in Germany (until 1990 only West Germans, from 2010 incl. German-speaking foreigners)
Source: RA 2020



Decision criteria regarding the means of transport for holiday trips to DK, SE, NO, FI

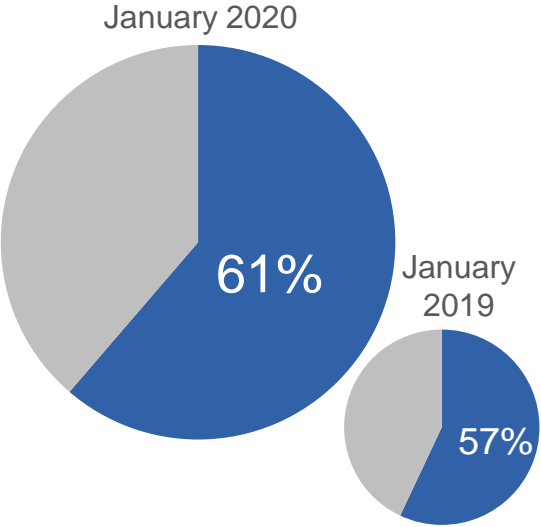


→ Sustainability is not unimportant, but (still) a secondary consideration



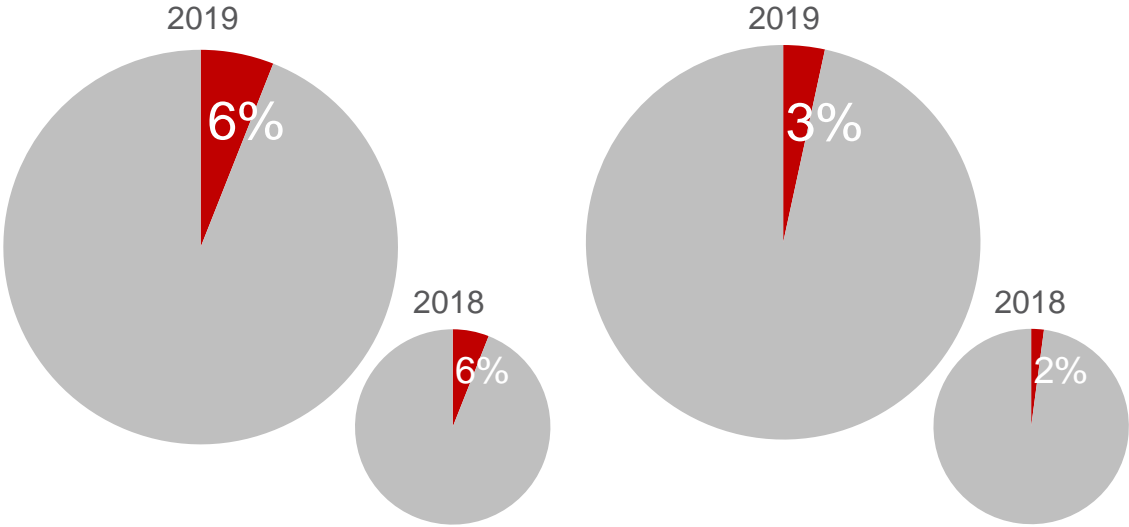
Sustainability in holiday travel: No Greta effect! the gap between attitude and behaviour remains

ATTITUDE*



My holiday should be as socially compatible and/or environmentally friendly as possible.

BEHAVIOUR**



special sustainability label of the accommodation or the tour operator

Carbon offsetting for transport or stay

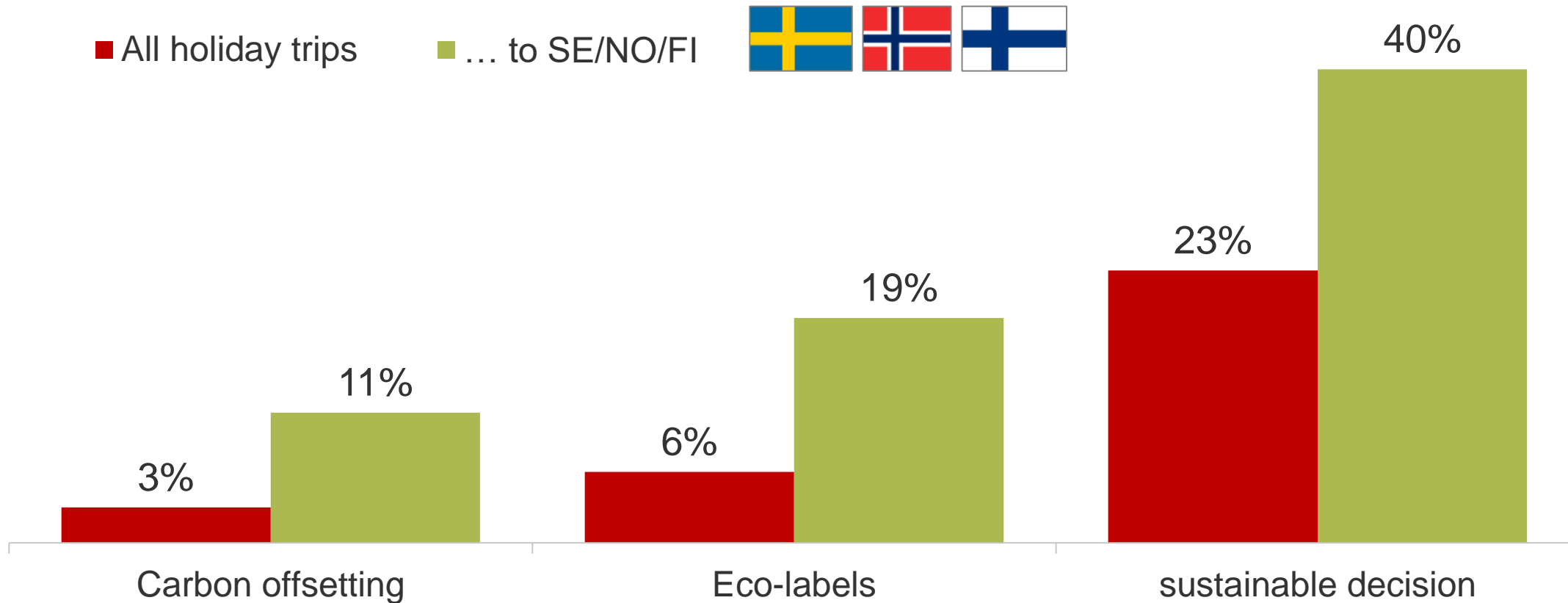
Basis: * holiday travellers or ** holiday trips (5+ days) in the German-speaking population 14+ years
Source: RA 2020



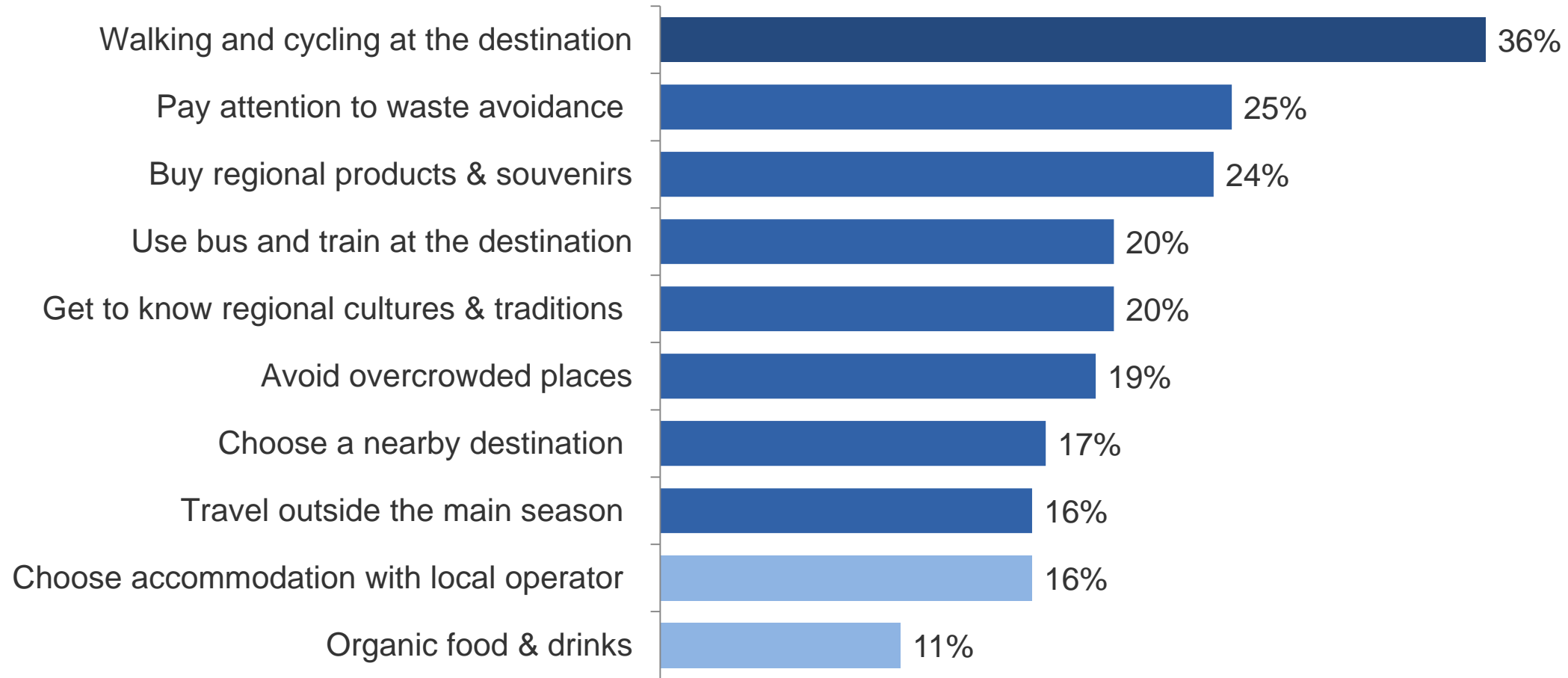
Sustainability in holiday travel:

Trips to Scandinavia are already more sustainable

BEHAVIOUR



Sustainable behaviour at the destination: What's easy to do and what fits with the holiday



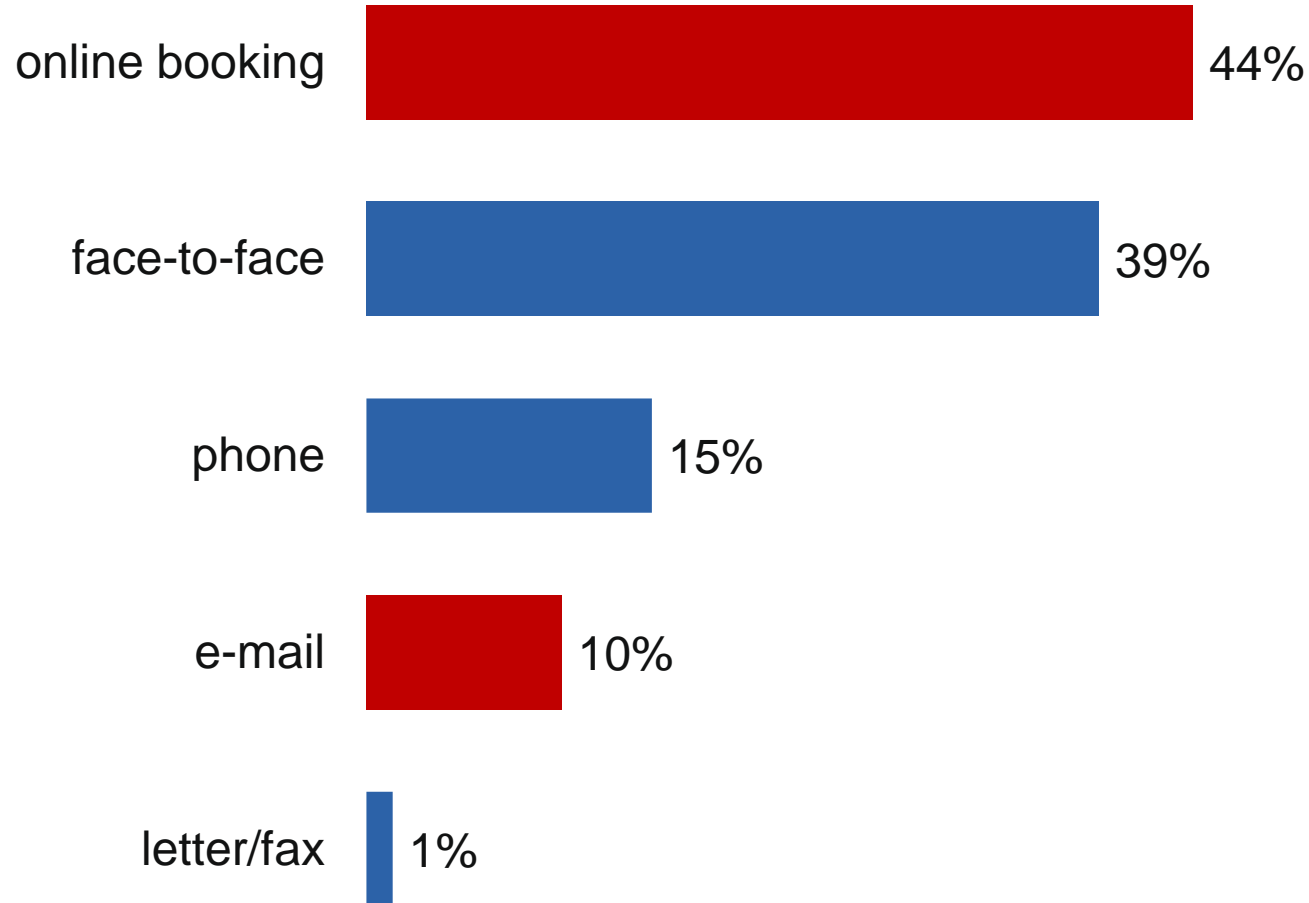
Question: „Now, we talk about sustainable holidays. Which of these possibilities or offers did you use during your main holiday trip 2019?“

Basis: Main holiday trips 2019 (= most important trip 5+ days) of the German-speaking population aged 14 or over

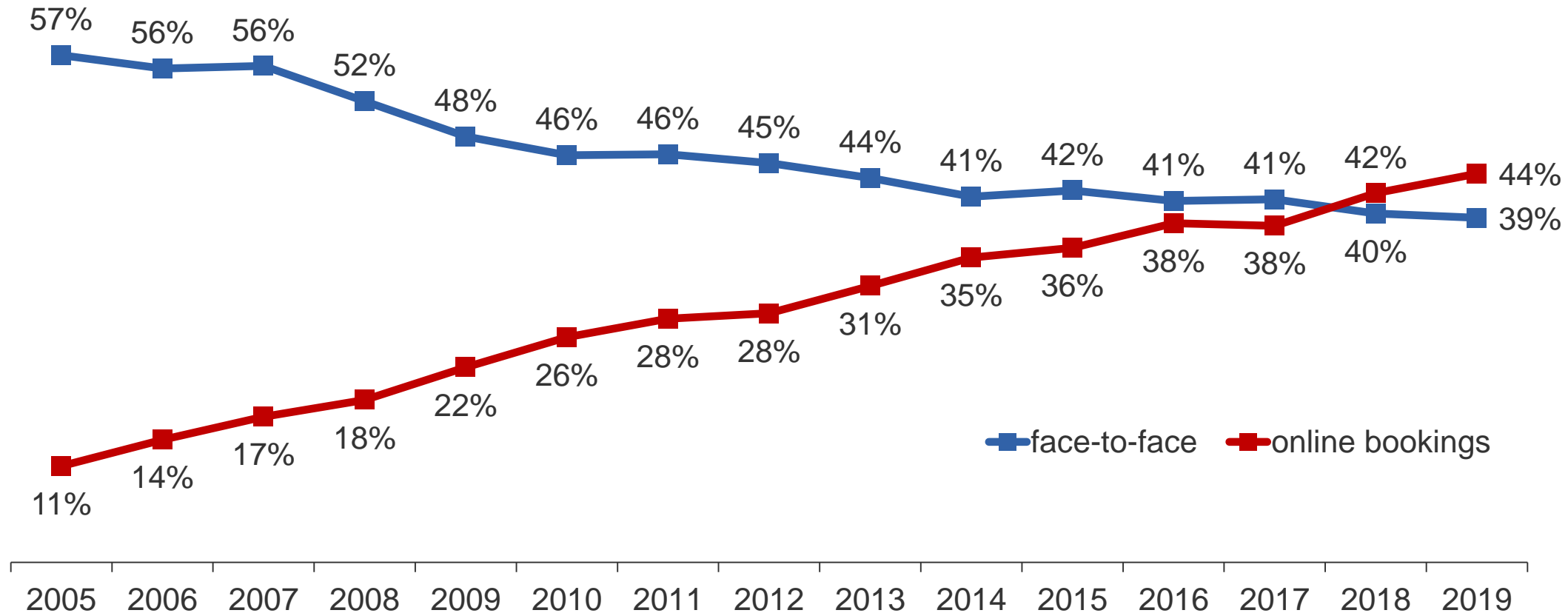
Source: RA 2020, *Module Sustainable Travel*



Booking channels for long holiday trips: Online bookings at the top

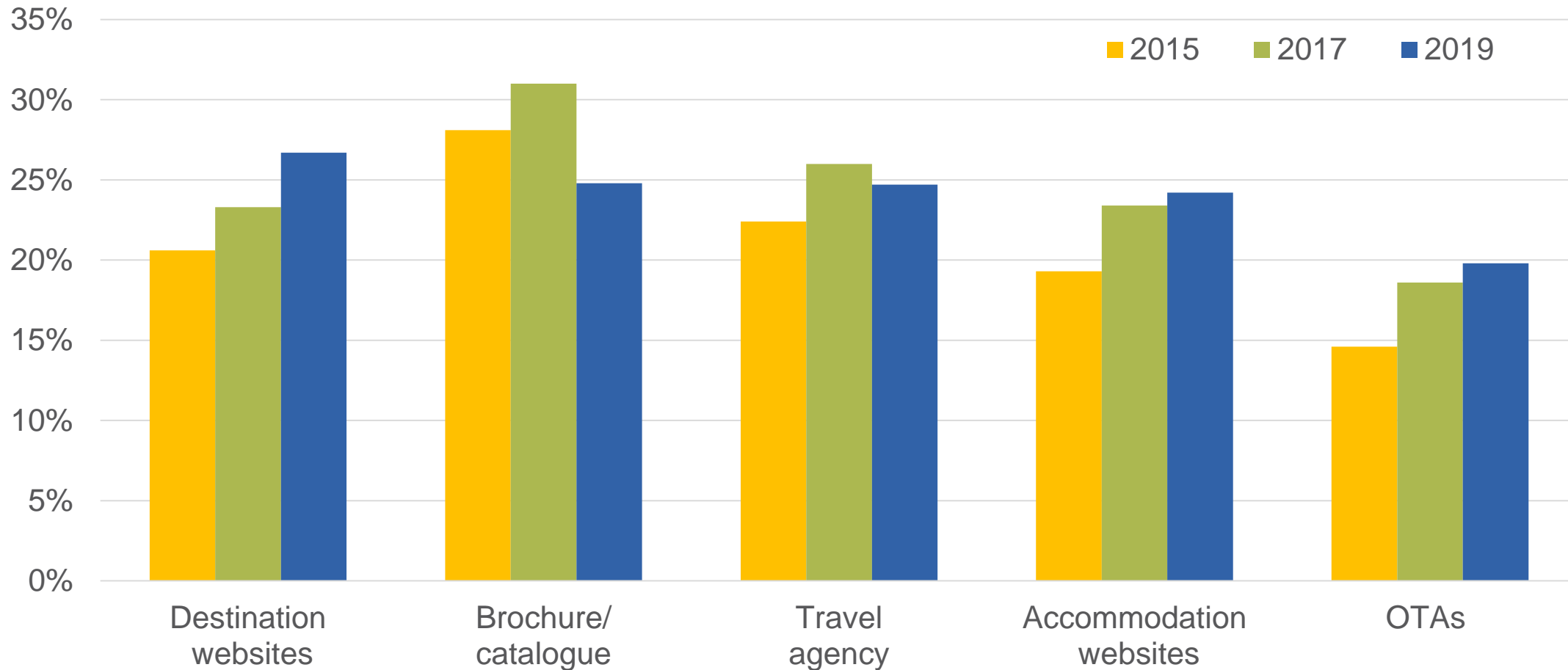


Booking channels for long holiday trips: Online bookings continue to grow



Inspiration & information when planning a holiday trip:

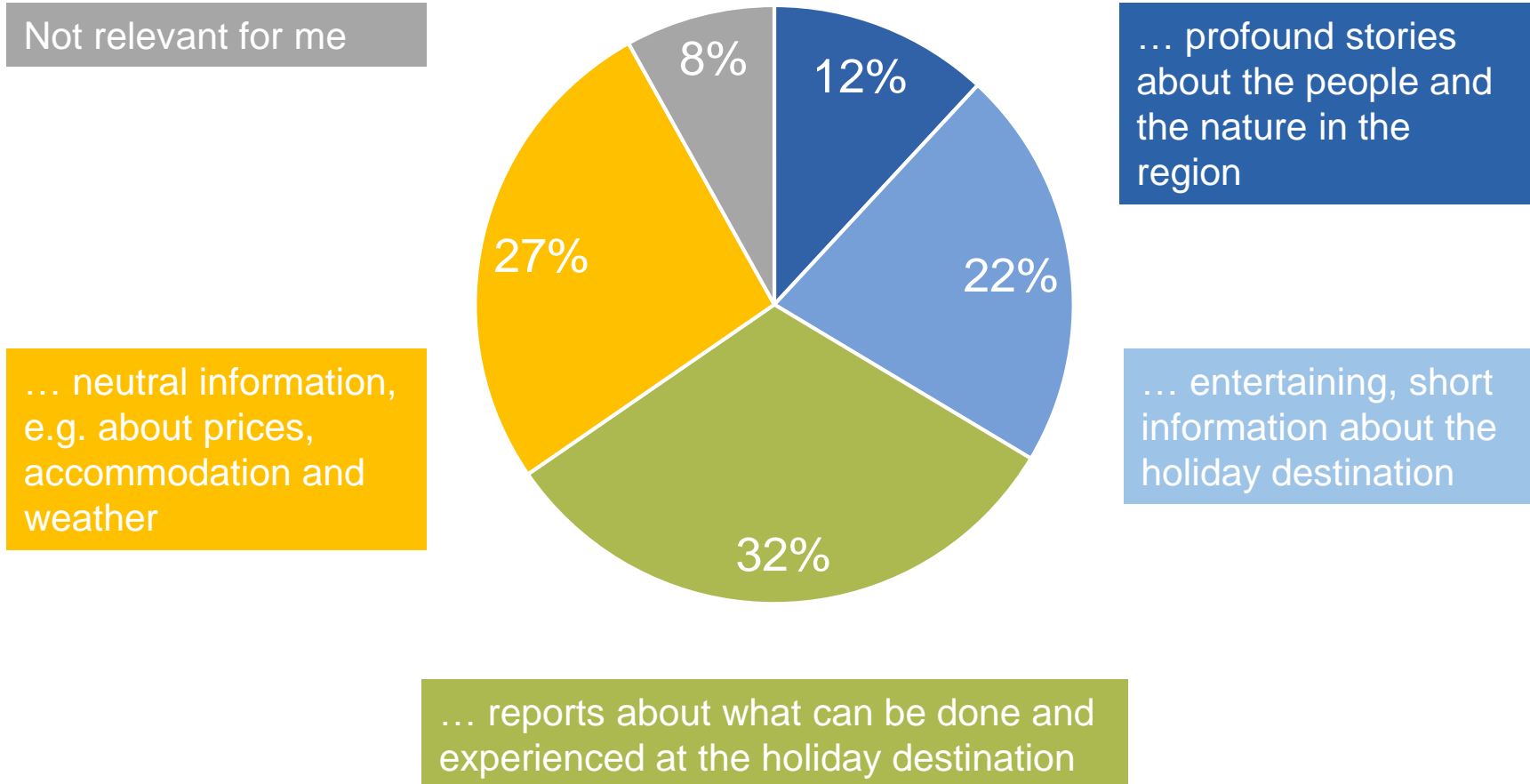
Online growing, travel agency stable, print still important



Content Marketing:

Different types of inspiration preferences

I am particularly open for ...



A photograph of the Aurora Borealis (Northern Lights) over a snowy landscape. The sky is dark with a vibrant green and blue aurora. The foreground is filled with snow-covered evergreen trees, their branches heavily laden with white snow. The ground is also covered in a thick layer of snow. The overall scene is serene and cold.

Finland on the German market: Volumes and competition

Interest to travel to **FINLAND**: 6.6 million Germans are generally interested to travel to Finland between 2019-2021

Finland last 3 years

0.8% (0.6 million)

of the population in Germany (aged 14+) have been to Finland on holiday or short holiday in the years 2017-2019

Finland next 3 years

9.4% (6.9 million)

of the population in Germany (aged 14+) are "almost definitely planning" or "generally considering" to spend a (short-)holiday in Finland in the years 2020-2022.

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

"In which of these countries have you spent a holiday during the last three years (that is 2016, 2017 or 2018)?"

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2019-2021) And which of these countries would you generally consider as a holiday destination in the next three years?"

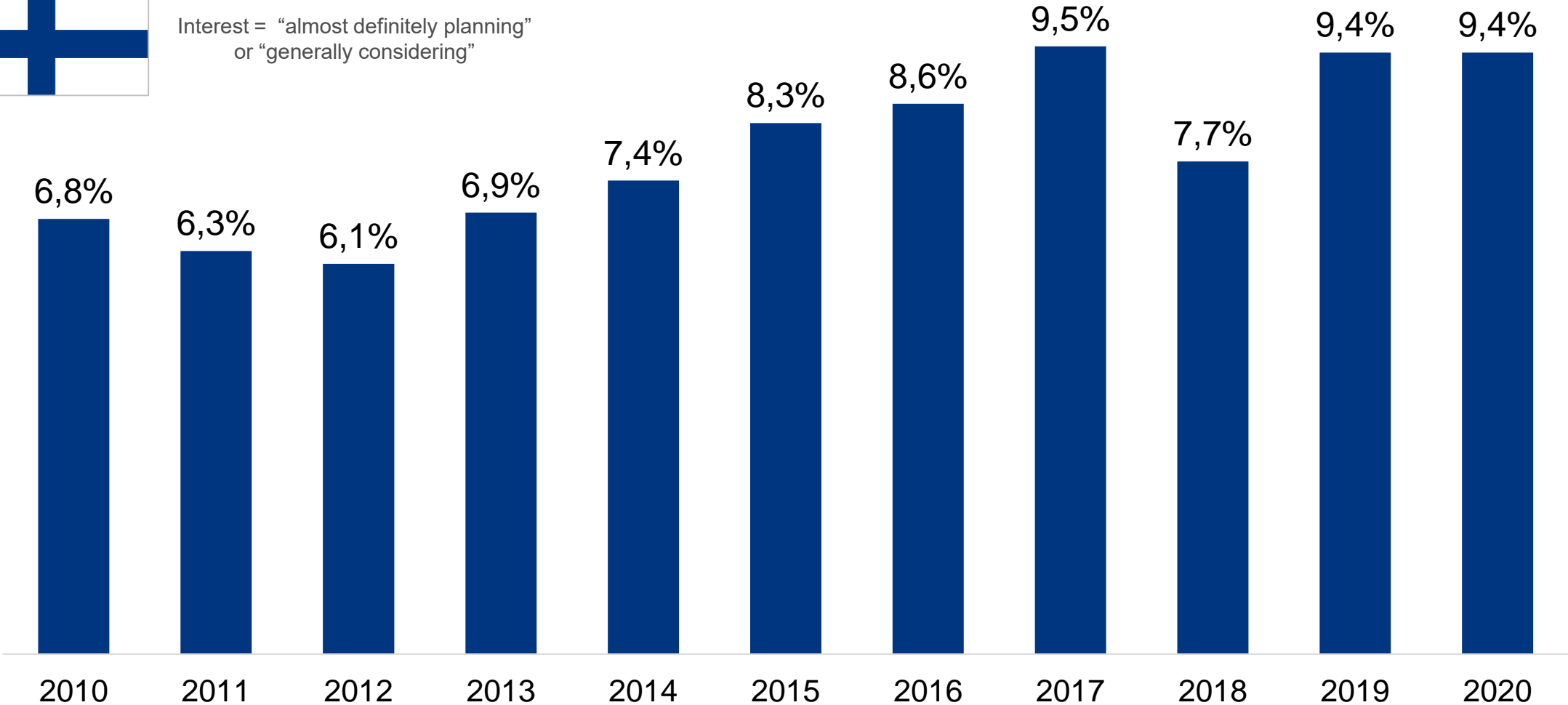
Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2019



Interest to travel to FINLAND: Increased share of potential travellers, stability of actual demand



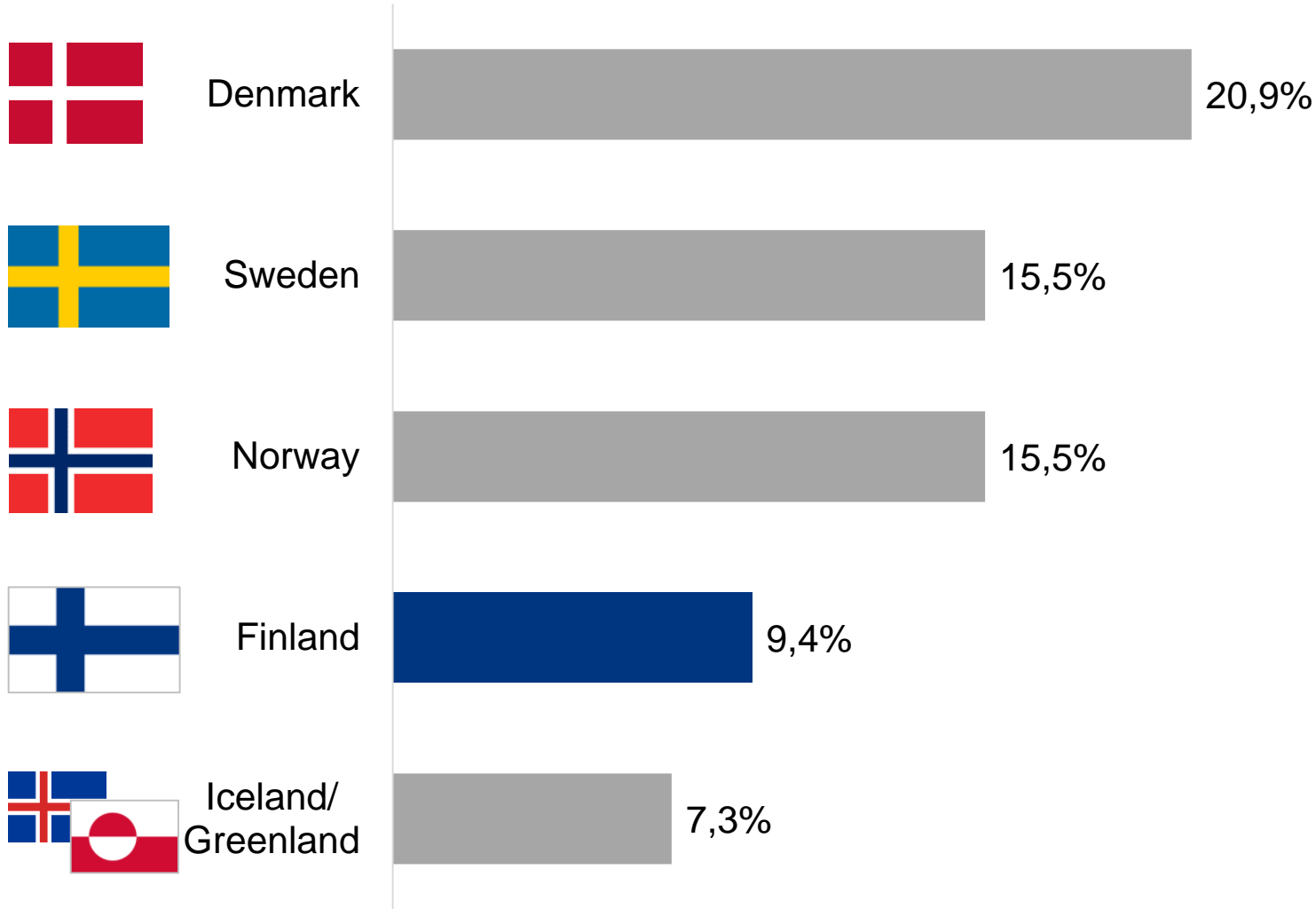
Interest = “almost definitely planning”
or “generally considering”



“In which of these countries have you spent a holiday during the last three years (that is 2016, 2017 or 2018)?”
“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2019-2021) And which of these countries would you generally consider as a holiday destination in the next three years?”
Basis: German/German-speaking population 14+ years in Germany; Source: Reiseanalyse 2009-2019



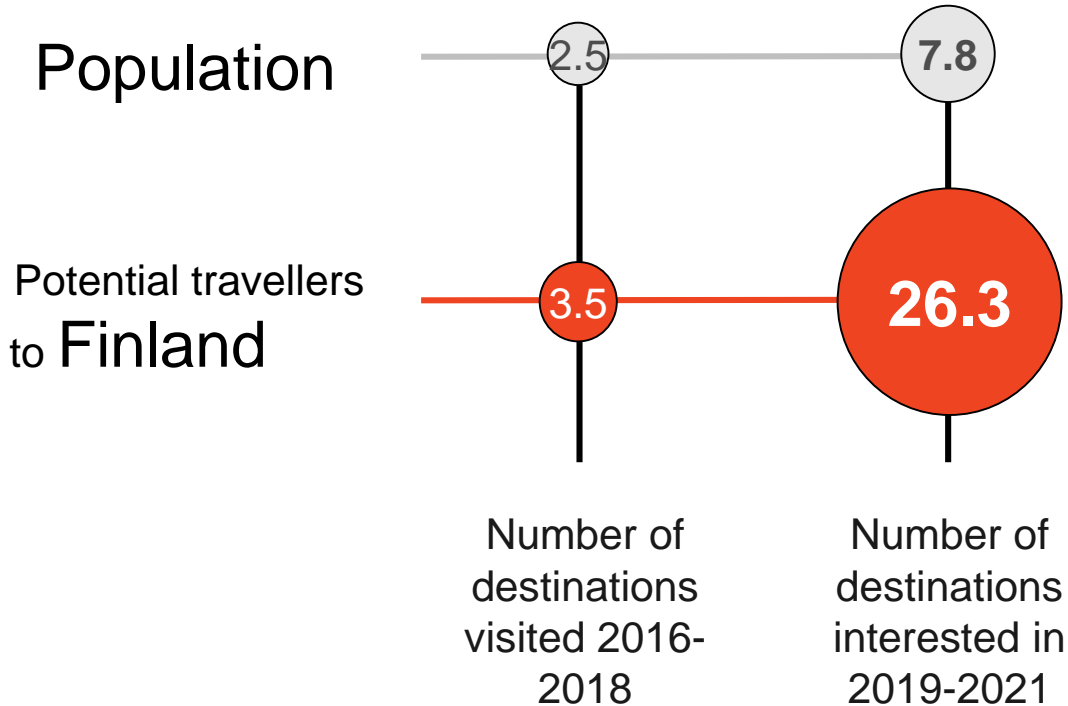
Comparison within Scandinavia: Finland's performance is good, but the other markets also do well



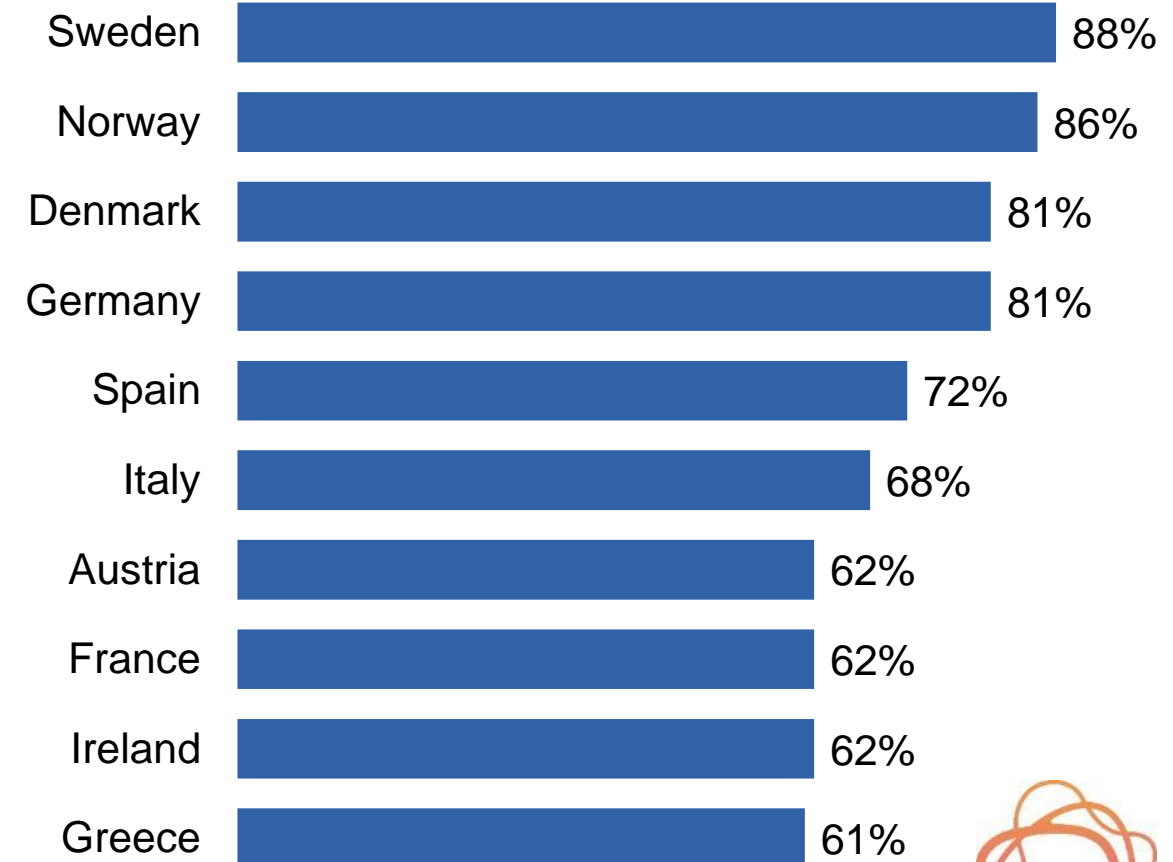
"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2020-2022) And which of these countries would you generally consider as a holiday destination in the next three years?" Set of 59 destinations worldwide;
Basis: German/German-speaking population 14+ years in Germany; Source: Reiseanalyse 2020



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



People, interested to go to Finland 2019-2021 for a holiday also would go to ...



Finland on the German market: Most are interested in all three Scandinavian destinations



5.4 million



0.4 million



0.3 million



0.5 million

Scandinavia-Lovers

NOT

Finland-Lovers

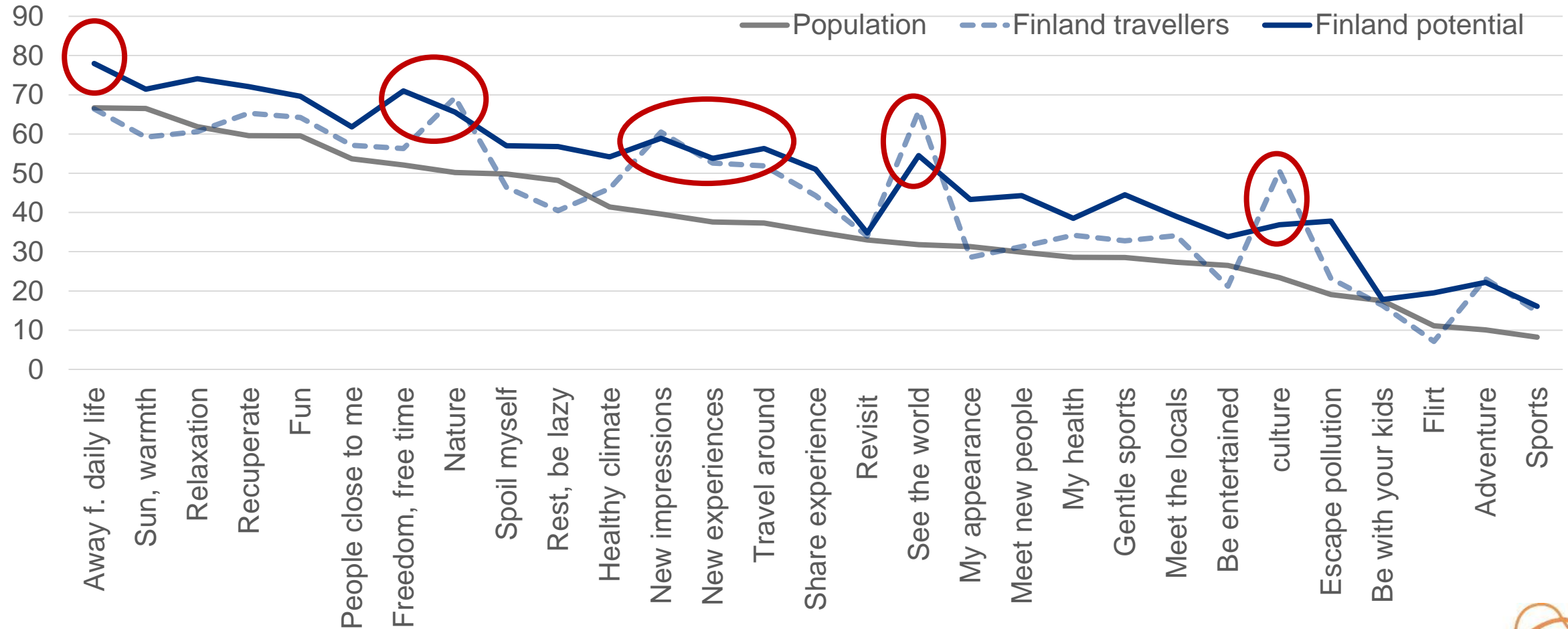




Thematic motivation and interests of potential guests to Finland

Potential guest to Finland: General holiday motivation

Relaxation, Freedom, Nature, Curiosity, Culture

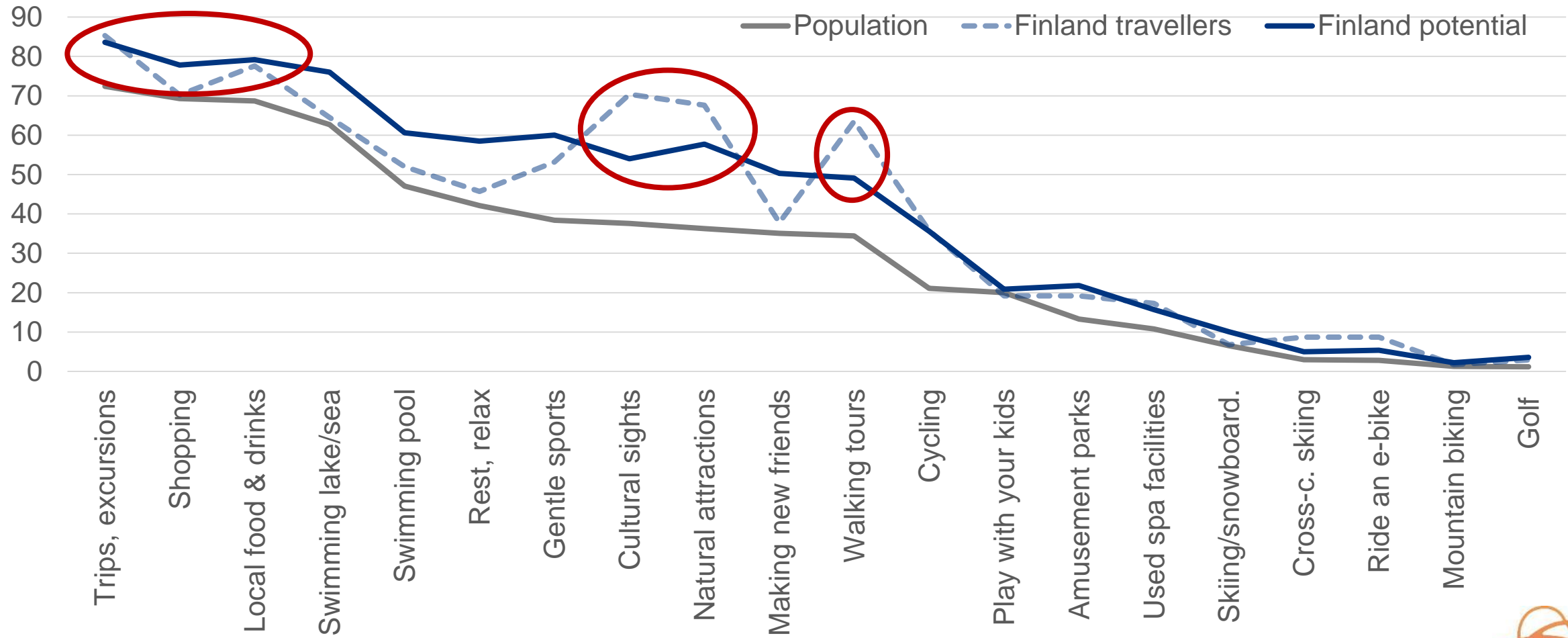


Basis: "Potential guests": Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years;
 German-speaking population 14+ years in Germany; in %; Source: Reiseanalyse 2017-2019



Potential guest to Finland: General holiday activities

Excursions, food/drinks, swimming

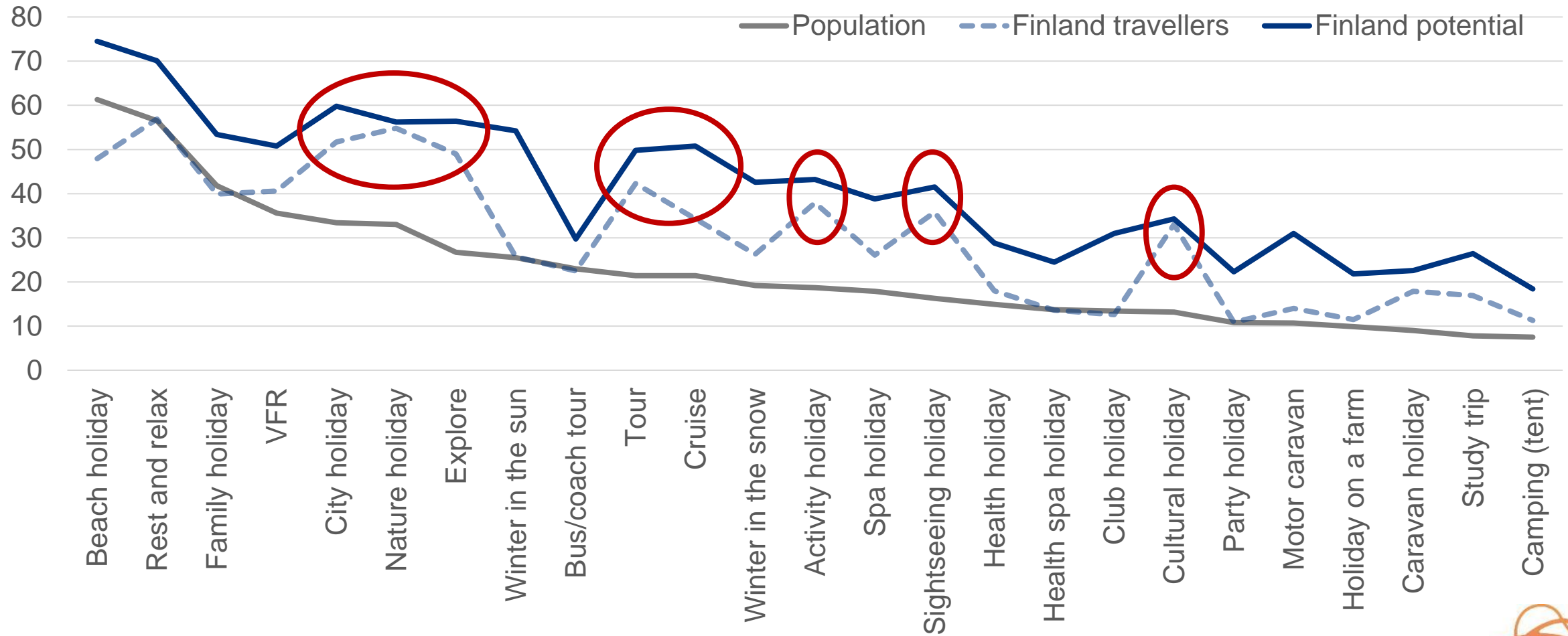


Basis: "Potential guests": Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years;
German-speaking population 14+ years in Germany; in %; Source: Reiseanalyse 2017-2019



Potential guest to Finland: General interest in types of holiday

Showing at the same time opportunities and challenges



Basis: "Potential guests": Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years;
 German-speaking population 14+ years in Germany; in %; Source: Reiseanalyse 2017-2019



Thematic motivation and interests of potential guests to Finland

**NATURE &
„Erlebnis“**

CURIOSITY
genuine
interest in
destination

**CULTURE,
too.**

ACTIVE

**Freedom &
Relax**

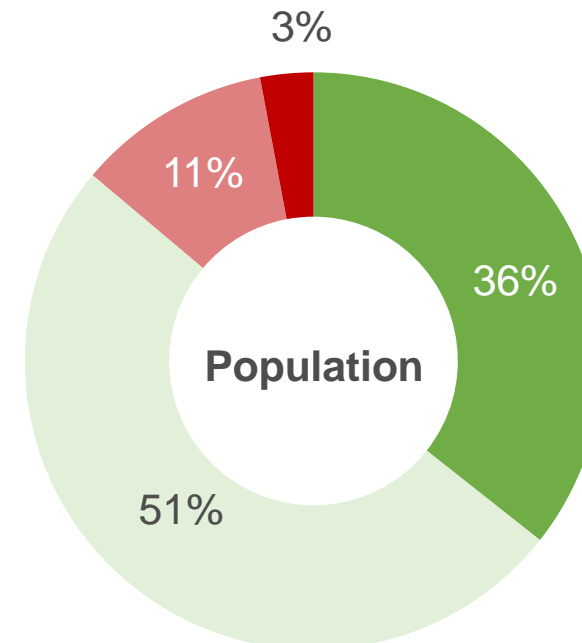
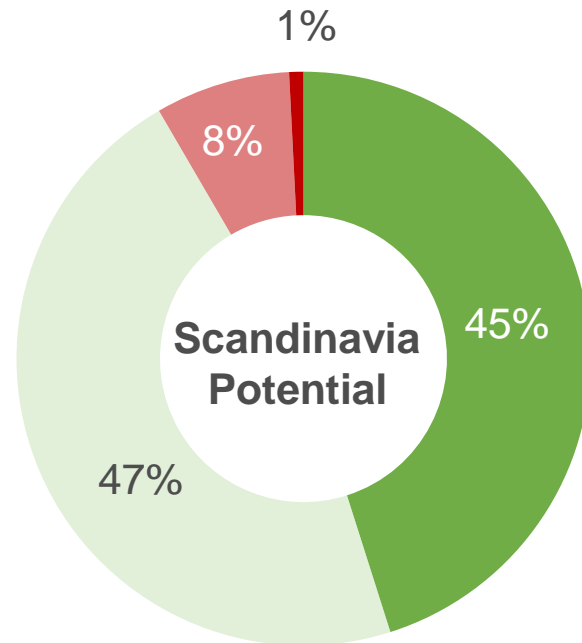


Nature on holiday – findings for Finland



For prospective Scandinavia-guests, **experiencing nature in holiday** has a higher relevance than for the population

"To experience nature on holiday, is for me personally ..."



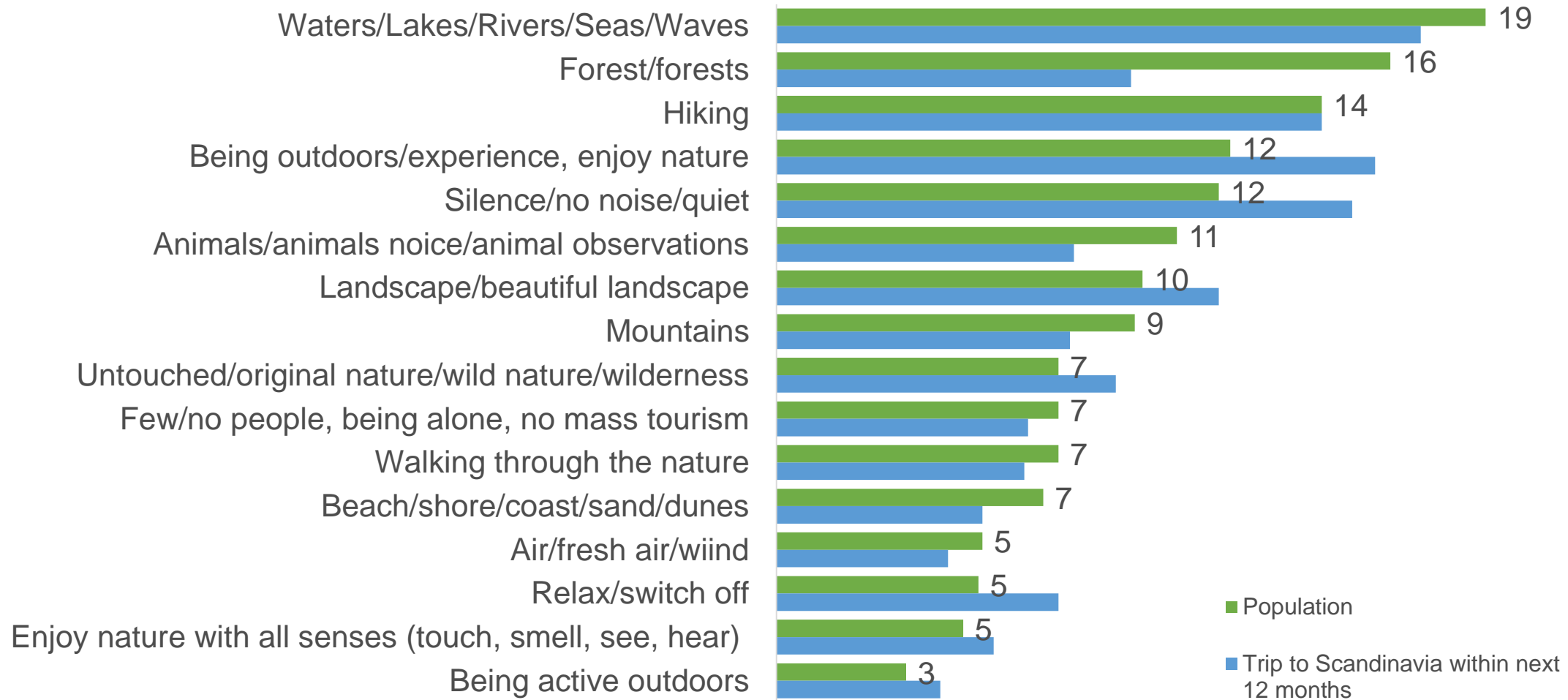
■ very important ■ rather important ■ rather unimportant ■ completely unimportant

Basis: German-speaking people 14 to 75 living in Germany who want to make a holiday trip to Scandinavia (Denmark, Norway, Sweden or Finland) within next 12 months (n = 329 resp. 8.19 million) vs. German-speaking population 14 to 75 living in Germany (n = 2,530 resp. 63.02 million), in%; Source: Reiseanalyse 2019



Experiencing nature - conceptual understanding:

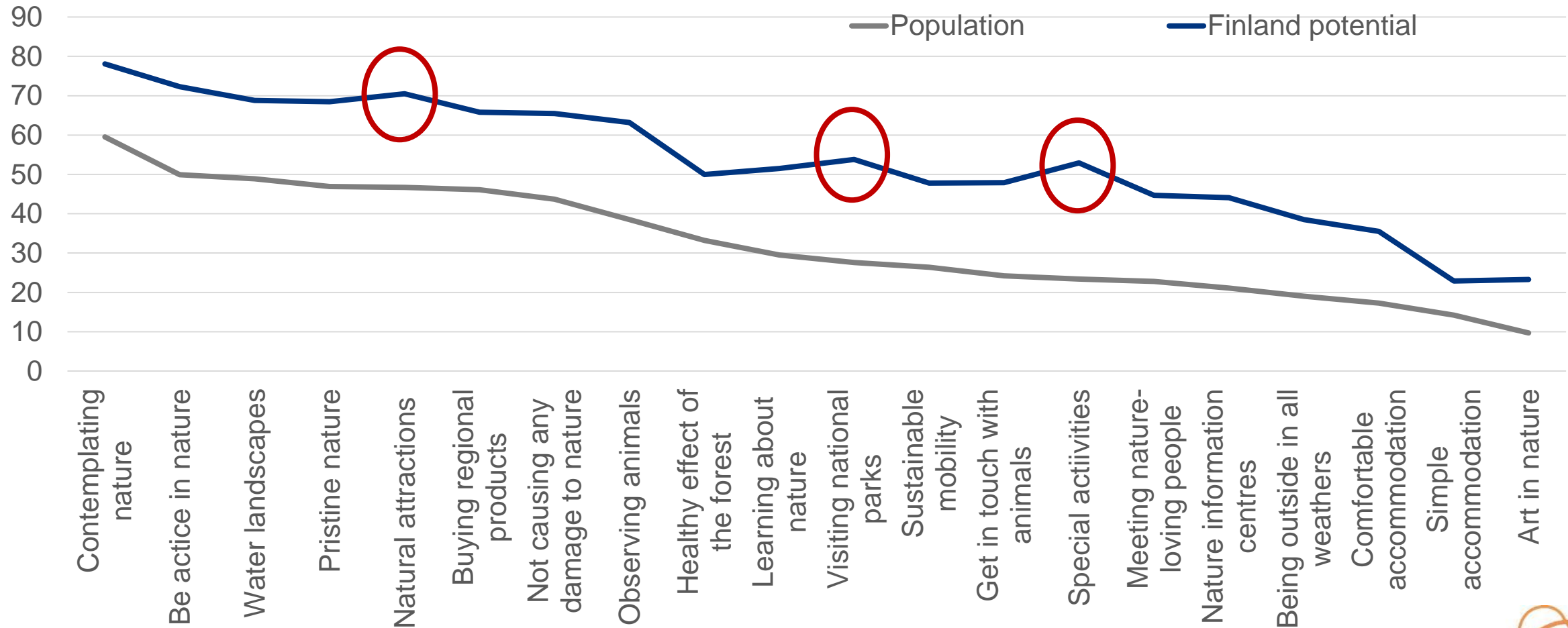
Being close to waters/outdoors, silence and hiking



Question: "When you hear the term 'experiencing nature', what do you personally mean by it? Please give me all the details you can think of." (open answer, top15 of responses are shown)
 Basis: German-speaking population 14 to 75 years, with interest in experiencing nature on holiday (n=2,179; 54,3 million) resp. the subgroup of those who want to spend a holiday within Scandinavia within the next 12 months (n=301; 7,5 million); in %; Source: Reiseanalyse 2019



Potential guest to Finland: General expectations concerning nature holidays – Contemplation,, activity, water

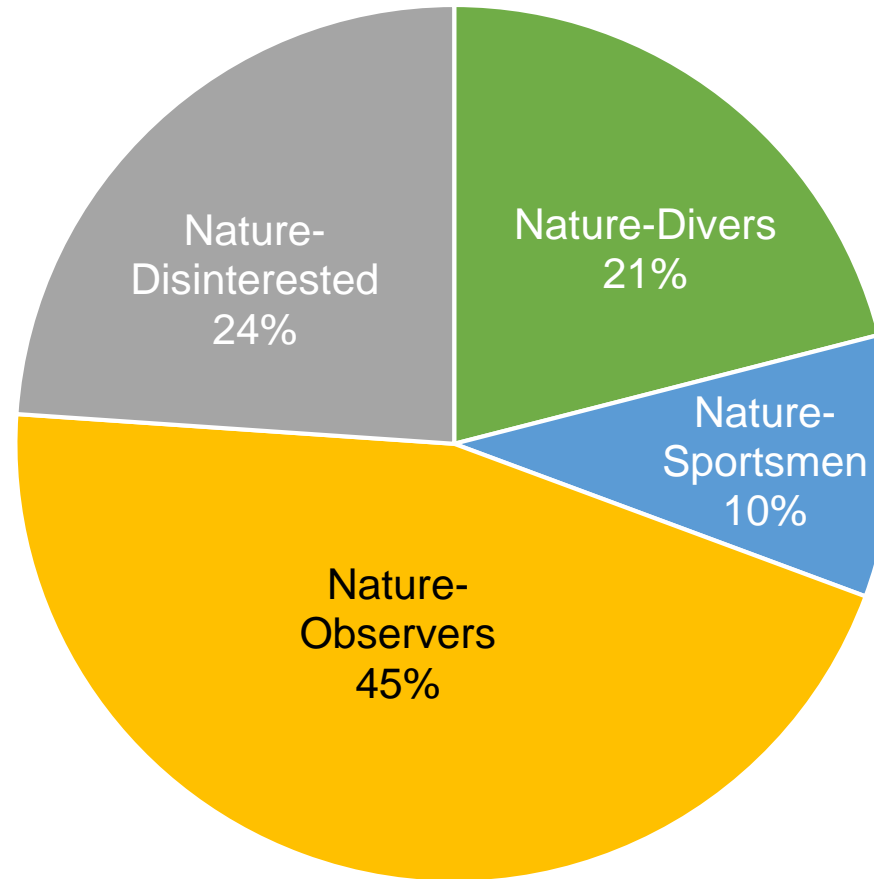


Question: "Which aspects are absolutely necessary for your nature holiday? And which aspects are desirable, but are not necessary for your nature holiday? (multiple answers possible), in%
 Basis: Potential Finland guests 2019-2021 (total), with interest in nature holidays (n = 424; 3,9 million), in%; Source: Reiseanalyse 2019



Nature types: 45% nature observers, 21% nature divers, 10% nature sportsmen and 24% nature disinterested

Nature experiences do not play a big role for me on holiday, other aspects are more important to me.



I want to experience nature on holiday as intensively as possible and perceive with all senses.

I would like to observe nature in the holiday region, enjoying it without moving much.

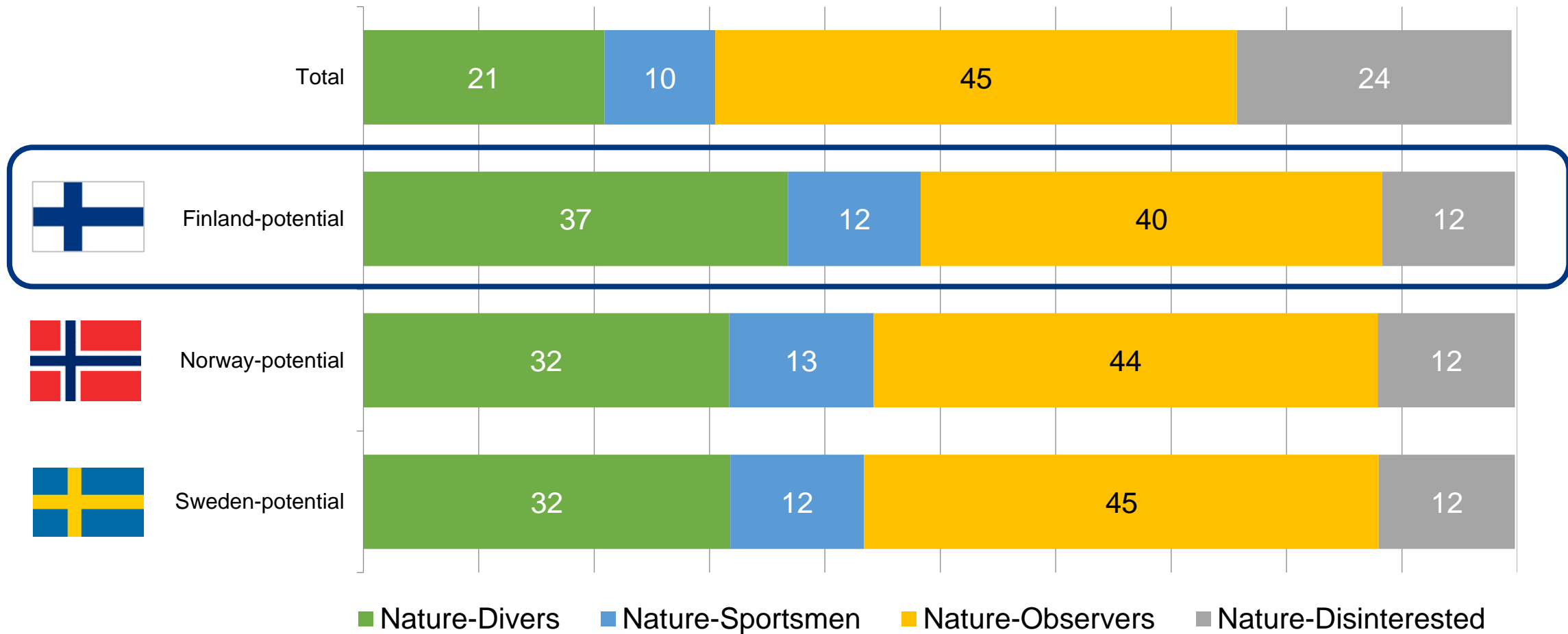
Nature serves me above all as an experience area for my sport activities (e.g. cycling, water sports).



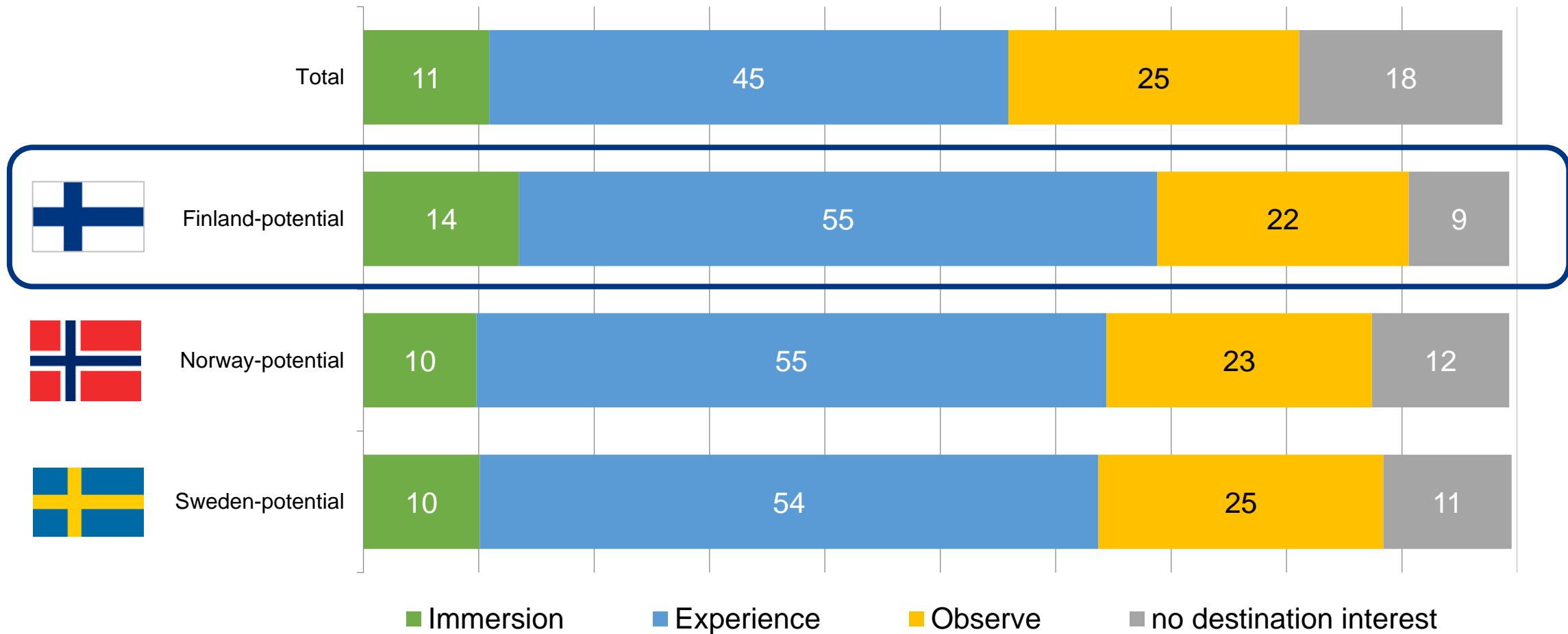
A little benchmarking with Sweden and Norway



Potential Finland guests: The share of 'nature divers' is higher than in the population and for Norway and Sweden



Potential Finland guests: Higher interest in immersion than in the population and for Norway and Sweden



Competitive advantages of Finland over Sweden and Norway regarding holiday motivation, activities and interest



Remembering our image question of 2016:

„Exotic“
*least well
known AND
most unique*

TOP:
*nature,
scenery, safe,
outdoor*

CHANCE:
*hospitality,
hiking, good
accom., eco-
friendly*

FIN>SWE:
*wintersports,
uniqueness,
scenery*

SWE>FIN:
*family,
weather, cities,
cycling*



A woman with long dark hair, wearing a sleeveless dress with horizontal rainbow stripes, is sitting on a wooden dock. She is facing away from the camera, looking out over a calm body of water towards a distant shoreline under a warm, golden sunset sky. Her legs are extended out over the water, and a splash of water is visible near her feet. On the dock in front of her lies an open book and a small white mug with a red floral pattern. The dock is made of wooden planks, and the water reflects the warm light of the setting sun.

Conclusions & Outlook

Looking for New Market Opportunities?

- These findings may give you inspiration regarding the right products and the communication for the German market
- Customers are not one-dimensional, so it's not easy to 'catch' them
- Keeping on the sustainability track is a good idea – but nobody travels to be sustainable!
You still need to focus on great holiday experiences
- Nature has to be „experientable“
- Start with product aspects where you are good at!
These can be niches



Looking for New Market Opportunities?



Hybrid customer

Combining culture, nature and immersion

Summer activities → “gentle sports”



Looking for New Market Opportunities?



**Products combining
the strengths of Finland**



Looking for New Market Opportunities?

- Finland is quite exotic and not that well known
- That means you can choose the profile that you want to have



Goal:
Number 1 destination
for the Germans
in the North?!





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