Visit Finland
German Market Context

• Every 5th international visitor comes from the DACH area. This provides opportunities as there is more potential than realised sales.

• Germany is a strong and stable market for Finland through its proximity, multi-seasonality and membership of the Schengen and Euro zone.

• German tourism to neighbouring countries inside EU, may increase if sustainable aspects become more important to destination choices.

• There is an interest towards Nordic lifestyle, design & culture.
Where do we rank in visitors minds?
When asked spontaneously which countries are considered as a holiday destination in the next three years, Finland lags behind Sweden, Norway and Denmark.
A similar picture when prompted. The Nordic region as a whole has become a more popular destination since 2015.

**Total Consideration**

- **Finland**: 62% (Rank '19 #10, change vs '15 +1)
- **Sweden**: 74% (Rank #2, +3)
- **Denmark**: 68% (Rank #5, +3)
- **Norway**: 75% (Rank #1, +5)
- **Iceland**: 59% (Rank #11, +1)

*Note: Different methodology and consideration set used.*

**Q7. PROMPTED CONSIDERATION DESTINATION**

Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

Base: Total Sample (1,000)
The #4 position within the Nordics is further seen when looking at claimed visitation. Denmark is particularly strong in converting German considerers to visitors.

**Consideration to P3Y Visit Funnel**

- **Finland**
  - Consideration: 62
  - Ever Visited: 18
  - Visited last 3 years: 8
  - Base: Total Sample (1,000)

- **Sweden**
  - Consideration: 74
  - Ever Visited: 35
  - Visited last 3 years: 14

- **Denmark**
  - Consideration: 68
  - Ever Visited: 48
  - Visited last 3 years: 22

- **Norway**
  - Consideration: 75
  - Ever Visited: 31
  - Visited last 3 years: 14

- **Iceland**
  - Consideration: 59
  - Ever Visited: 11
  - Visited last 3 years: 6

Visit Finland

Q7 Consideration Destination, Q3 Ever Visited Destination, Q6 Visited P3Y
Demographically, those aged 35-44 are most likely to consider or visit Finland. The 55-65 group need more convincing as they are currently significantly more likely to consider Sweden and Norway.

**Age profile**

- **Consideration Destination**
  - Age profile:
    - 18-24: 62%
    - 25-34: 58%
    - 35-44: 63%
    - 45-54: 61%
    - 55-65: 52%
  - Additional data:
    - 18-24: 71%
    - 25-34: 61%
    - 35-44: 71%
    - 45-54: 58%
    - 55-65: 49%

- **Ever Visited**
  - Age profile:
    - 18-24: 18%
    - 25-34: 17%
    - 35-44: 26%
    - 45-54: 15%
    - 55-65: 19%
  - Additional data:
    - 18-24: 7%
    - 25-34: 17%
    - 35-44: 26%
    - 45-54: 15%
    - 55-65: 19%

- **Visited last 3 years**
  - Age profile:
    - 18-24: 8%
    - 25-34: 11%
    - 35-44: 11%
    - 45-54: 4%
    - 55-65: 7%
  - Additional data:
    - 18-24: 4%
    - 25-34: 11%
    - 35-44: 11%
    - 45-54: 4%
    - 55-65: 7%

70% & 77%
Of this age group consider Sweden and Norway, respectively, as a travel destination.

Base: Total Sample (1,000)
Perceptions of Finland only being for people who like to be outside a lot is a key barrier to visit.
What are we known for as a travel destination?
Mental Network Analysis: discover what is truly associated with Finland

What is Mental Network analysis?
We ask travellers to use their own words to share emotions about destinations – we then use text mining software to identify mental shortcuts to destinations. – One step beyond spontaneous impressions

What does it show us?
We can accurately quantify the main themes and highlight distinctive associations for Finland and competitors
How to read the mental network map?

STRENGTH
The size of the bubbles/thickness of lines represents the percent of mentions.

CONNECTEDNESS
Inter-connections between bubbles. represent co-occurrences of mentions of a theme:
• These are themes / associations that respondents mentally link together.

RICHNESS
Each bubble represents a theme/association.
• The more the number of brand associations, the more the number of bubbles in the map.

Color coding represents groupings of themes, which can be based on various things:
• Sentiment (positive, negative)
• Other groupings (e.g. product related themes vs contextual themes vs emotion themes)

Themes or associations that are closer together are NOT more closely related, UNLESS they are connected by a line.
Germans strongly associate Finland with its nature landscapes and features (especially the lakes); which are strongly interconnected. Helsinki comes to mind quite well.

**Country Mental Network - Finland**

- Natural landscapes: Beautiful, great, wonderful scenery, landscape
- Landscapes: Northern Lights, Auroras, Polar lights
- Frozen features: Fjords, Lapland
- Winter activities: Ski, Sled
- Nature: Moccasins, Mosquitoes
- Snow, Ice, Frozen landscapes, Glaciers
- Fish, Fishing
- Helsinki: Quiet, Peaceful
- Forests
- Snow, Ice, Frozen landscapes, Glaciers
- Lakes
- Wildlife (whales, bears, reindeer, horses, moose)
- Nature, Rugged landscapes, Green
- Untouched, Wild nature, Parks
- Saunas
- Mosquitoes
- Christmas time, Father Christmas, Santa
- Difficult language
- Expensive
- Nice
- Friendly, nice, welcoming people
- Functional, Cities
- Emotional, Food/Drink, Negative
- Landmarks: Nature, Landscapes
A similar nature/capital picture emerges with Sweden. Inline with higher consideration, Sweden has more associations linked to its cities, culture and friendly people.

Country Mental Network - Sweden

Nature | Rugged landscapes | Green
Islands | Archipelago
Lakes
Forests
Vastness | Expanse
Beautiful, great, wonderful scenery | landscape
Wildlife (whales, bears, reindeer, horses, moose)

Functional
Cities
Emotional
Food/Drink
Negative
Image
Landmarks
Nature, Landscapes

Base: Consideration Set: Sweden (607)

Visit Finland
Q9 BMN
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Culture and family associations play a larger role in Denmark, although associations to nature (especially to the sea), and the capital hold the richest and most connected associations.

**Country Mental Network - Denmark**

- **Holidays | Family holiday | Visit friends**
- **Quiet | Peaceful**
- **Relaxing**
- **Easy to get to | Visit | Close**
- **Lego | Legoland**
- **The food**
- **Expensive**
- **Scandinavian**
  - **Cultural | Culture | Traditions**
  - **The Little Mermaid | Hans Christian Anderson**
- **Architecture | Buildings**
- **Interesting | Attractive Cities**
- **Copenhagen**
- **Nature | Rugged landscapes | Green**
- **Coast | Coastline**
- **Islands | Archipelago**
- **Water | water ways | rivers**
- **Fish | Fishing**
- **The Baltic Sea**
- **The North Sea**
- **Colourful Houses | Cottages**
- **Beautiful | Attractive**
- **Friendly | nice | welcoming people**
- **Beautiful, great, wonderful scenery | landscape**
- **Coast | seaside | beaches**
- **The sea**
- **Water | water ways | rivers**
- **The Baltic Sea**
- **The North Sea**
- **Colorful Houses | Cottages**
- **Beautiful | Attractive**
- **Friendly | nice | welcoming people**
- **Nature, Landscapes**
- **Functiona**
- **Cities**
- **Emotional**
- **Food/Drink**
- **Negative**
- **Image**
- **Landmarks**

Base: Consideration Set: Denmark (547)

Visit Finland

Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.

The strongest association to Norway in Germany lies in its fjords. Unlike in Finland, the northern lights are connected to the capital.

Country Mental Network - Norway

Base: Consideration Set: Norway (634)

Functional
- Cities
- Emotional
- Food/Drink
- Negative
- Image
- Landmarks
- Nature, Landscapes

Q9 BMN

Visit Finland

Norway

16
Iceland’s unique natural features come through strongly in Germany, with good connections between them. Icelandic cultural associations are not very top of mind.

Country Mental Network - Iceland

- Hot springs | Hot spas | Geysers | Thermal pool
- Nature | Rugged landscapes | Green
- Cold, Dark
- Snow | Ice | Frozen landscapes | Glaciers
- Waterfalls
- Volcanoes
- Beautiful, great, wonderful scenery | landscape
- Mountains
- Hiking
- Vastness | Expanse
- Loneliness
- Quiet | Peaceful
- Clean | Fresh air
- The sea | seaside | beaches
- Islands | Archipelago
- Untouched | Wild nature | Parks
- Beautiful | Attractive
- Friendly | nice | welcoming people
- Trolls | Goblins
- Expensive
- Good - not specific
- Reykjavik
- Northern Lights | Auroras | Polar lights
- Wildlife (whales, bears, reindeer, horses, moose)

Base: Consideration Set: Iceland (500)
Finland share few associations with its Nordic neighbours. Encouragingly, association with being expensive are not linked to Finland.
Whilst lacking in connections with its neighbours, Finland own quite a few of its associations - many of which are related to winter/Christmas. Advantages with lakes and saunas also comes through

Country Mental Network – Germany Market

- Hot springs | Hot spas | Geysers | Thermal pool
- Nature | Rugged landscapes | Green
- Winter activities (Ski, Sled)
- Untouched | Wild nature | Parks
- Difficult language
- Vastness | Expanse
- Christmas time | Father Christmas | Santa
- Cold, Dark
- Nice
- Lakes
- Finland
- Nature, Landscapes
- Wildlife (whales, bears, reindeer, horses, moose)
- Architecture | Buildings
- Islands | Archipelago
- Gothenburg
- Interesting | Attractive Cities
- Stockholm
- Ikea
- The Royal Family
- Troll | Goblins
- Waterfalls
- Saunas
- Mosquitoes
- Islands | Archipelago
- The Baltic Sea
- The sea | seaside | beaches
- The North Sea
- Colourful houses | Cottages
- Relaxing
- Easy to get to | Visit | Close
- Beautiful | Attractive
- Scandinavian
- Lego | Legoland
- Colourful houses | Cottages
- Relaxing
- Holidays | Family holiday | Visit friends
- The Little Mermaid | Hans Christian Anderson
- Beautiful | Attractive
- Easy to get to | Visit | Close
- The North Sea
- Fish | Fishing
- Oslo
- Mountains
- Northern Lights | Aurora | Polar lights
- Fjords
- North Cape
- Helsinki
- Dorms
- Reykjavik
- Hiking
- Other
- Functional
- Cities
- Emotional
- Food/Drink
- Negative
- Image
- Landmarks
- Nature, Landscapes

Base: Consideration Set: Finland (596), Sweden (607), Denmark (547), Norway (634), Iceland (500)

Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Natural associations also come through in the rest of the Nordics, as do the capital cities in all countries barring Iceland.
The lower consideration towards Finland as a holiday destination is likely linked to a lack of knowledge of the destination, amongst those with strong knowledge consideration is stronger.
Finland does not stand out much from its Nordic neighbours on imagery perceptions, though do fall slightly behind Sweden, Denmark and Norway in terms of cultural perceptions.
The Nordics, especially Norway, have strong nature associations. Sustainable tourism isn’t very well known

**Image Associations (Total Sample)**

- It offers calming and relaxing wilderness escapes and experiences: 80%
- It is easy to access (by plane, car or train)
- It has beautiful natural landscapes
- It has a beautiful coastline / archipelago
- It has beautiful lake areas with lots of lakes
- The climate is pleasant for summer holidays
- It's a good place to visit all year round
- It's a great place for winter sports/activities (e.g. skiing, snowboarding)
- You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.)
- It is known for providing/promoting sustainable tourism

**Q13 IMAGE ASSOCIATIONS**
Do you associate any of these holiday destinations with the following statements?
More needs to be done to promote Finland’s association with sustainable tourism amongst the German population – particularly so amongst the younger audience.

Image - It is known for providing/promoting sustainable tourism

<table>
<thead>
<tr>
<th>Country</th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>37%</td>
<td>27%</td>
<td>30%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Iceland</td>
<td>37%</td>
<td>20%</td>
<td>33%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Sweden</td>
<td>35%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q13 IMAGE ASSOCIATIONS
Do you associate any of these holiday destinations with the following statements?

Have 'a great deal' of knowledge about Finland

Sig diff at 95% vs Total Sample
German's perceptions of what a 'sustainable travel destination' is, is focused on preserving the natural environment. Additionally, German's would like to see less waste and more sustainable transport.

**Sustainable travel destination - OEs**

- Little destruction of nature for hotels and other tourist things. Climate-friendly means of transport to the destination. Regional, seasonal organic food, gladly vegetarian.
- Untouched nature and great diversity of flora and fauna.
- Regulated tourism, not too crowded.
- For me personally, is a sustainable destination, a country where the people take nature and the environment into account and live with it in peace, harmony.
- Preserves a country where a lot of importance on environmental protection nature.
- Good environment for those who are at the hotel. For example, no disposable plastic items used, it uses green electricity, etc.
- No environmentally damaging events, sustainable food, sustainable accommodation.
- A place where tourists can admire the sights and nature is not damaged.
- Environmentally friendly.
- Landscapes not destroyed for tourism, but expanded so that nature is undisturbed in spite of the people. Offer regional products and eco-friendly travel options.
- Less paper (ticket or other card) and less plastic use as a tourist.
- Cycling holidays.
In terms of activities and experiences associated with Finland, saunas and Santa have strong links with the Germans.
The pure nature and clean air is a clear association with all Nordic countries.
How are people visiting us?
The German population most prefer city breaks, relaxation as well as beach holidays when they travel abroad.

**Preferred Holiday Type (Total Sample)**

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>City breaks</td>
<td>58%</td>
</tr>
<tr>
<td>Relaxation &amp; well-being</td>
<td>52%</td>
</tr>
<tr>
<td>Beach</td>
<td>48%</td>
</tr>
<tr>
<td>Tours to multiple cities/locations within a country</td>
<td>44%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
<td>38%</td>
</tr>
<tr>
<td>Cultural</td>
<td>37%</td>
</tr>
<tr>
<td>Country holidays</td>
<td>33%</td>
</tr>
<tr>
<td>Tours to multiple countries in a region</td>
<td>30%</td>
</tr>
<tr>
<td>Health &amp; spa</td>
<td>24%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter</td>
<td>20%</td>
</tr>
<tr>
<td>Cruises</td>
<td>19%</td>
</tr>
<tr>
<td>Shopping trips</td>
<td>15%</td>
</tr>
<tr>
<td>Festive holidays at Christmas</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,000)
There is an opportunity to push and promote Helsinki, Tampere and Turku as great city break destinations to attract these type of travellers.
There is a clear Finnish advantage for relaxation holidays, a preferred German holiday type. Focus should be placed on capitalising on this advantage.
The majority of people in Germany who are considering visiting the Nordic countries plan and make the bookings themselves.

**Trip Arranging**

- **Myself**: 59%
- **Tour operator**: 7%
- **Ready-made package**: 16%
- **Mix - myself and tour operator**: 14%
- **Other**: 2%

**Book trip myself**

- **Sweden**: 62%
- **Denmark**: 63%
- **Norway**: 56%
- **Iceland**: 53%

Base: Consideration Set: Finland (630), Sweden (638), Denmark (581), Norway (659), Iceland (518)
Most people in Germany travel with their spouse or partner

**Travel Companion**

- With spouse / partner: 61%
- With young family aged 16 or under (e.g. children, grandchildren): 22%
- With adult family aged 17+ (e.g. parent, sister): 18%
- With adult friend(s) aged 17+: 17%
- No-one, I travel alone: 12%
- Other: 2%
- With a school, college or study group: 1%

Base: Total Sample (1,000)
• In Germany, consideration of Finland as a holiday destination has improved since 2015, however this is also true for the region as a whole. The growing region consideration is resulting in every 5th international visitor to Finland coming from the DACH area.

• Whilst consideration for the region has grown, compared to the other Nordic countries, consideration and conversions to visits for Finland is lower. Likely driven by an overall lack of knowledge about what Finland as a holiday destination has to offer. Increasing knowledge is key.

• Nature is top of mind when spontaneously thinking about Finland as well as other Nordic countries. Themes which Finland owns relate to the lakes, the saunas and winter related associations. Encouragingly, Finland is not associated with being expensive; an association which connects the rest of the Nordics.

• Finland is currently falling behind its neighbours on perceptions around providing/promoting sustainable tourism. A further push is required to both grow awareness of what Finland currently do in this field as well as to gain a lead.

• Activities strongly associated to Finland are visiting the home of Santa Claus and visiting saunas. The latter could be used to attract relaxation holiday makers, a preferred German holiday type.

• As a market, Germany is particularly keen on city breaks. There is an opportunity to push and promote Helsinki, Tampere and Turku as great city break destinations to attract these type of travellers.
Visit Finland