



Visit Finland



German Market Context

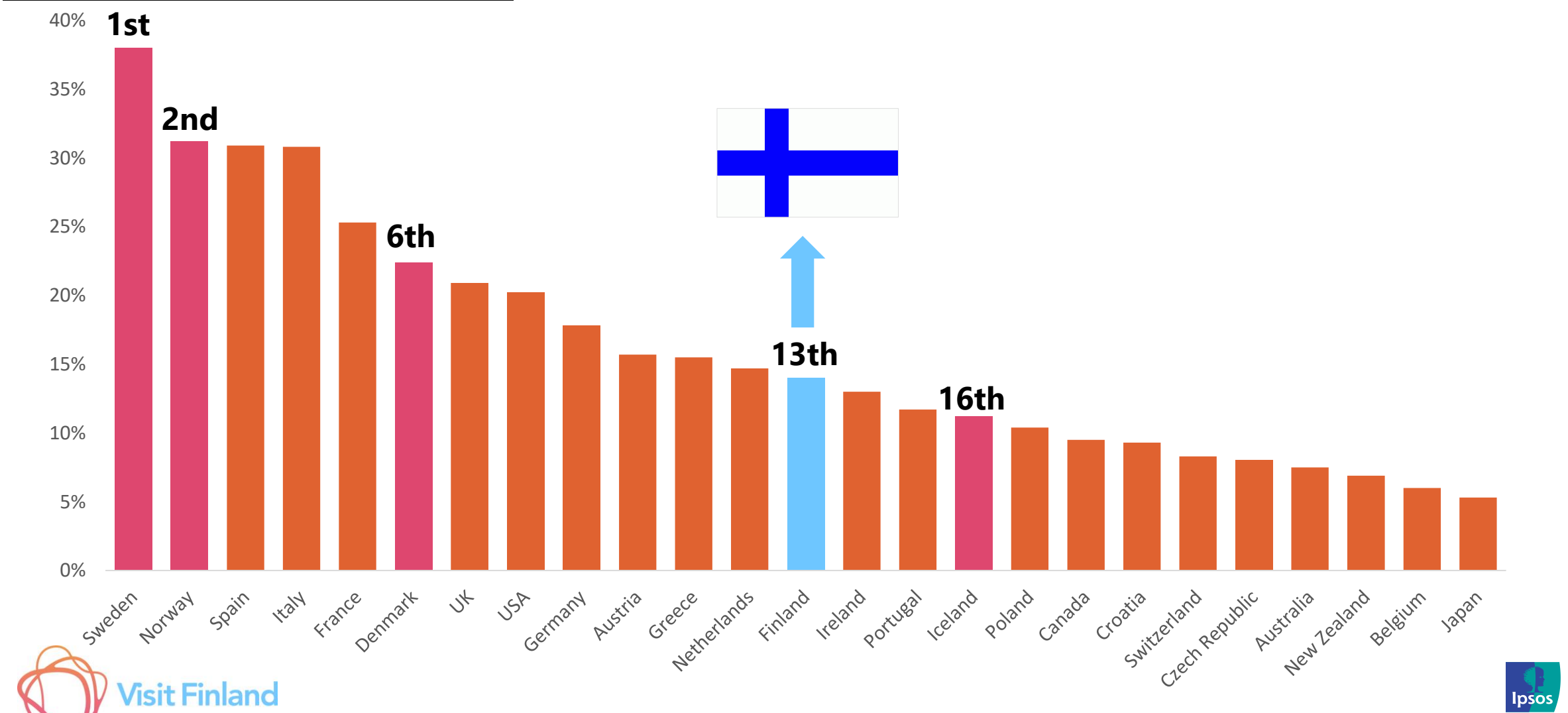
- Every 5th international visitor comes from the DACH area. This provides opportunities as there is more potential than realised sales.
- Germany is a strong and stable market for Finland through its proximity, multi-seasonality and membership of the Schengen and Euro zone.
- German tourism to neighbouring 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

Spontaneous Destination Consideration



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Q2. SPONTANEOUS CONSIDERATION DESTINATION

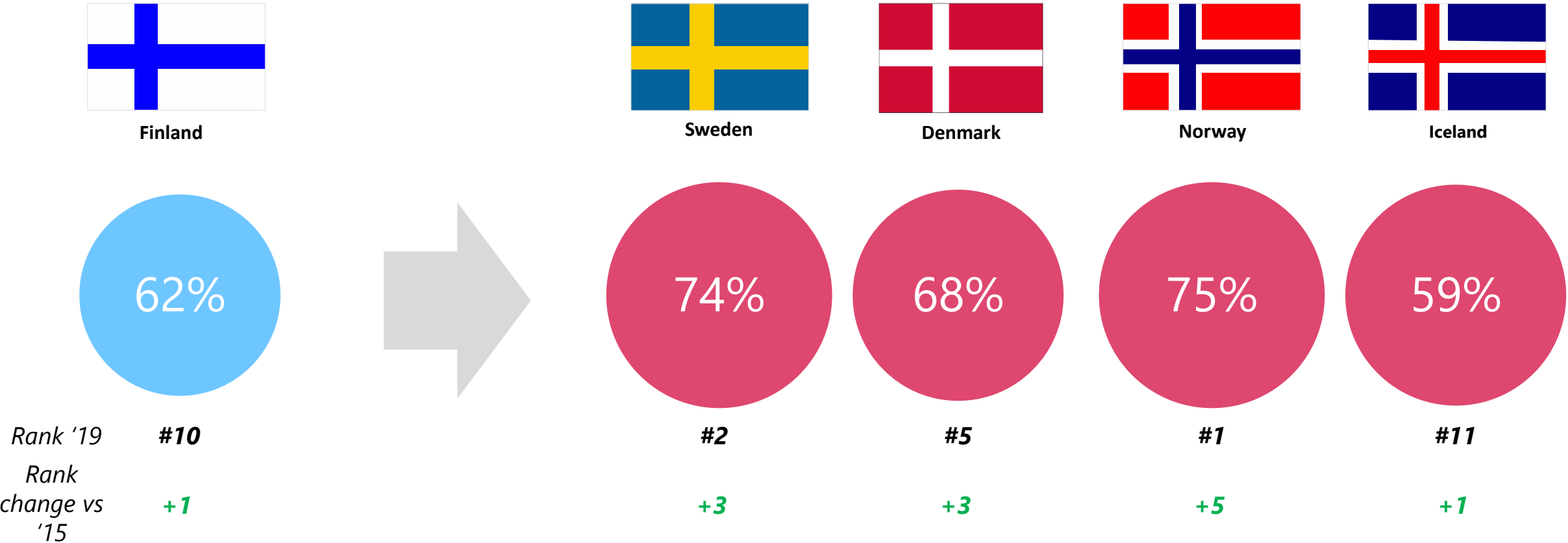
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries

Base: Total Sample (1,000)



A similar picture when prompted. The Nordic region as a whole has become a more popular destination since 2015

Total Consideration



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Q7. PROMPTED CONSIDERATION DESTINATION

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

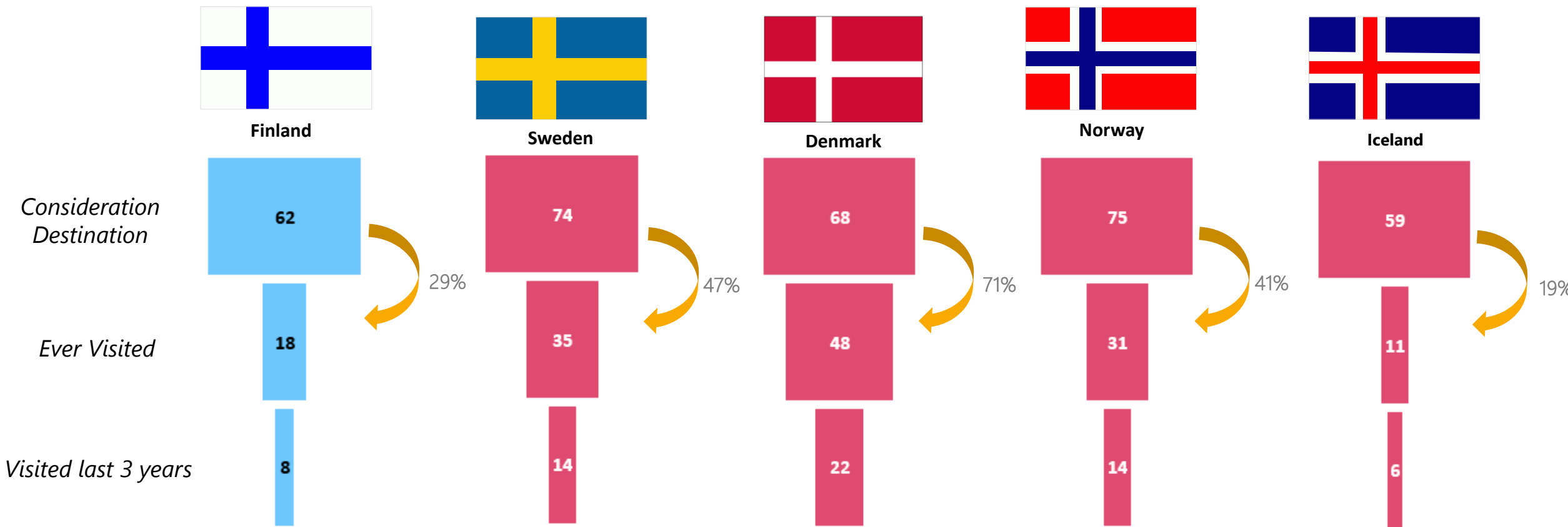
*=different methodology and consideration set used



Base: Total Sample (1,000)

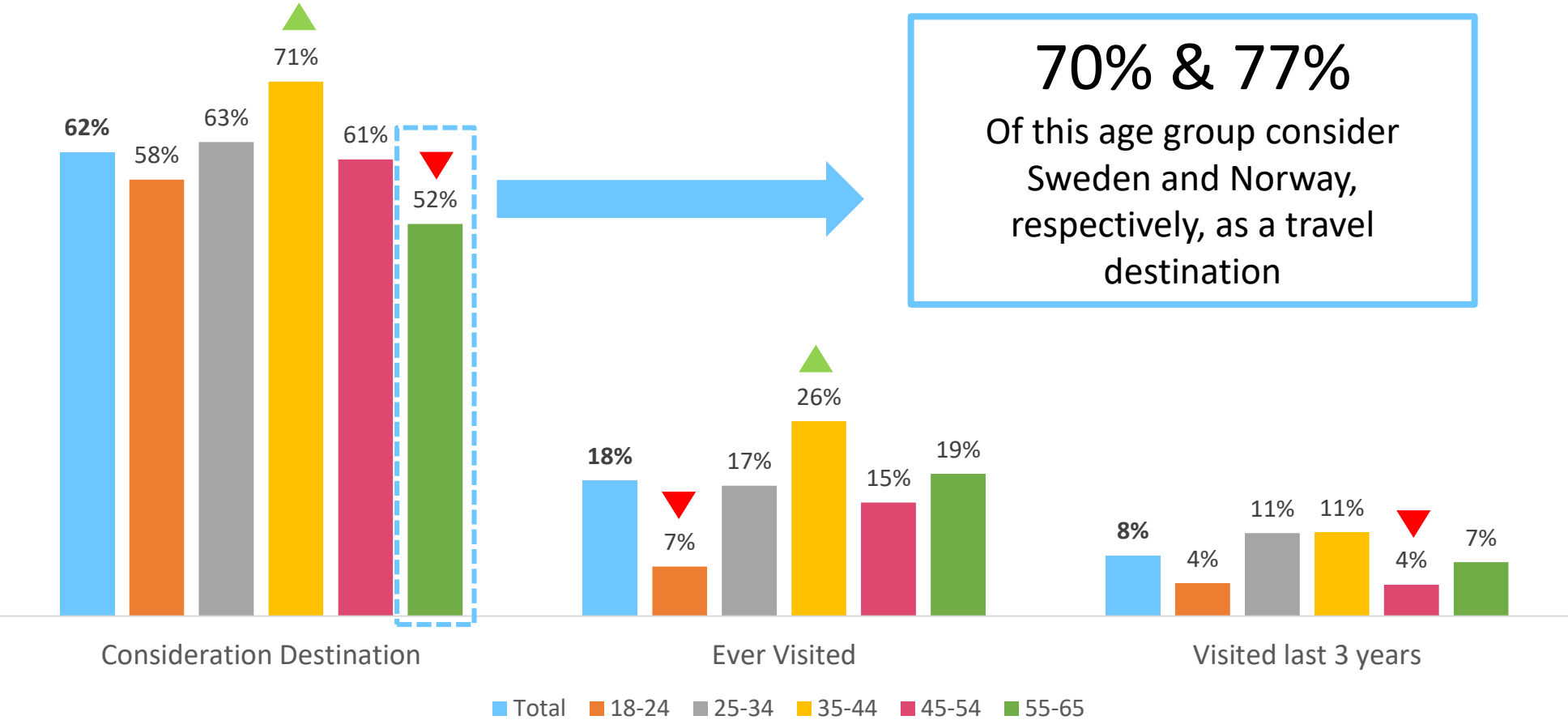
The #4 position within the Nordics is further seen when looking at claimed visitation. Denmark is particularly strong in converting German considerers to visitors

Consideration to P3Y visit funnel



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



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Q7 CONSIDERATION DESTINATION, Q3 EVER VISITED DESTINATION, Q6 VISITED P3Y

Sig diff at 95%
vs Total Sample



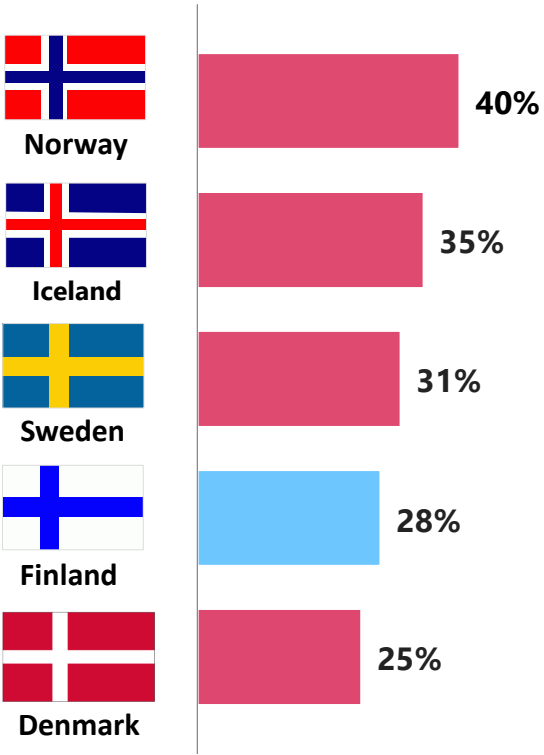
Base: Total Sample (1,000)



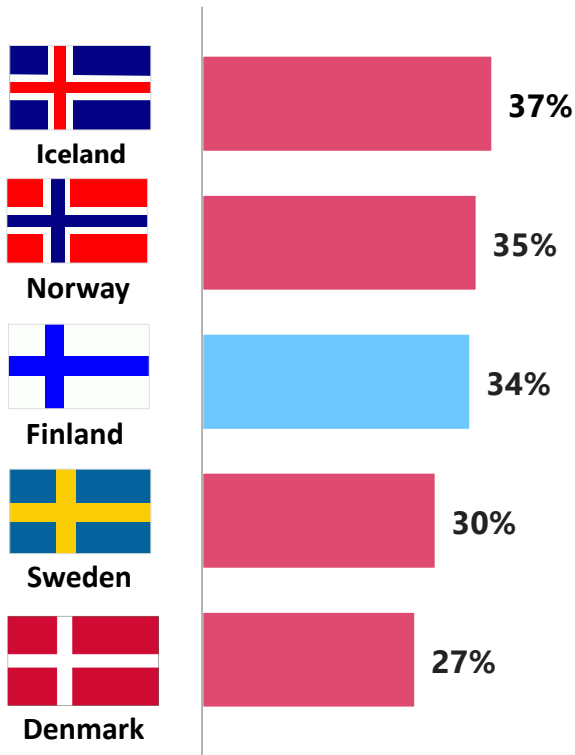
Perceptions of Finland only being for people who like to be outside a lot is a key barrier to visit

Barriers to visit

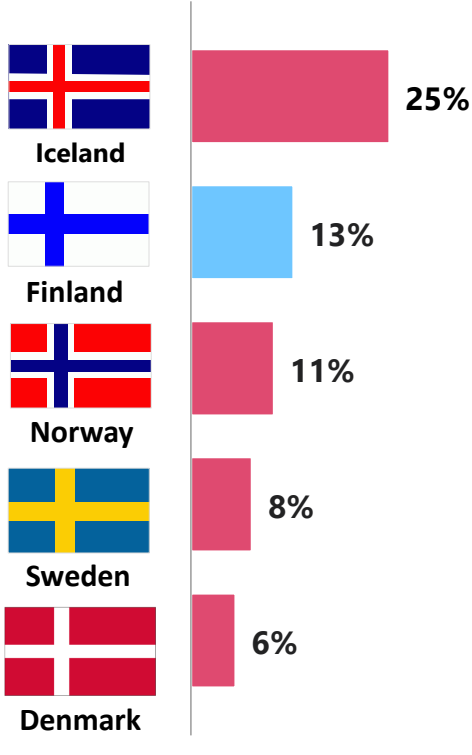
It's too expensive



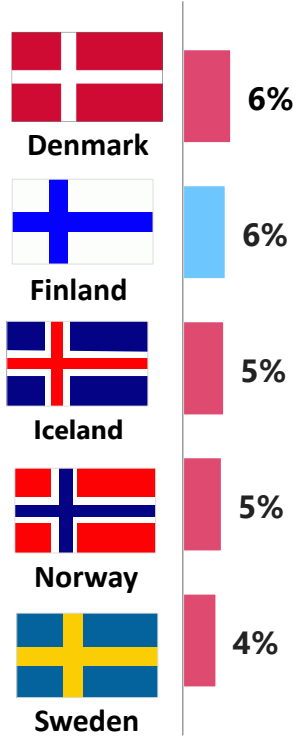
It is only for people who like to be outside a lot



It's too inaccessible/hard to reach



There is nothing much to do



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Q14 BARRIERS

Please now consider the following statements. Do you associate any of these holiday destinations with these statements?



Base: Total Sample (1,000)

**What are we known
for as a travel
destination?**



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Mental Network Analysis: discover what is truly associated with Finland

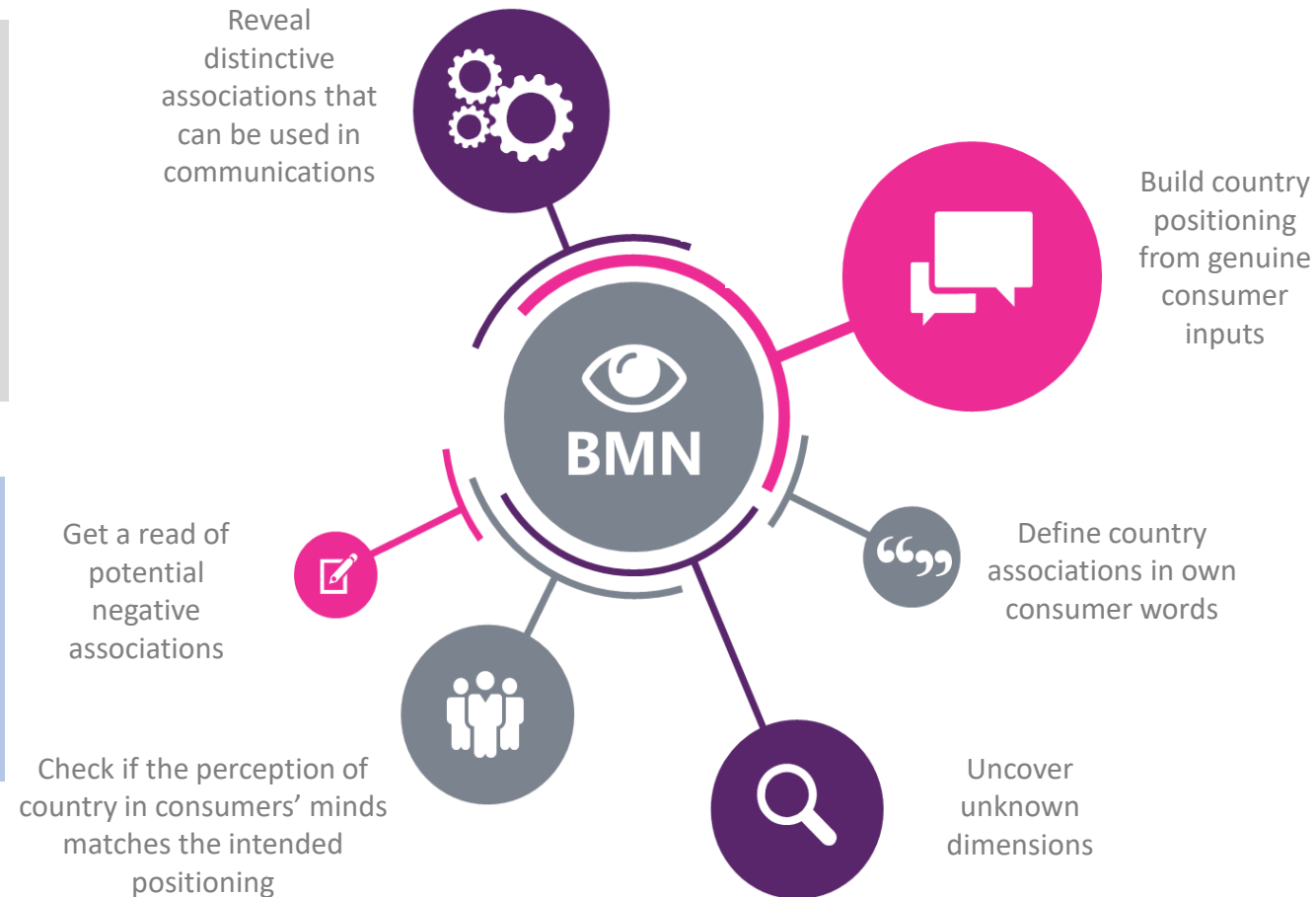
What is Mental Network analysis?

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.

RICHNESS

Each **bubble represents a theme/association**.

- The more the number of brand associations, the more the number of bubbles in the map.

CONNECTEDNESS

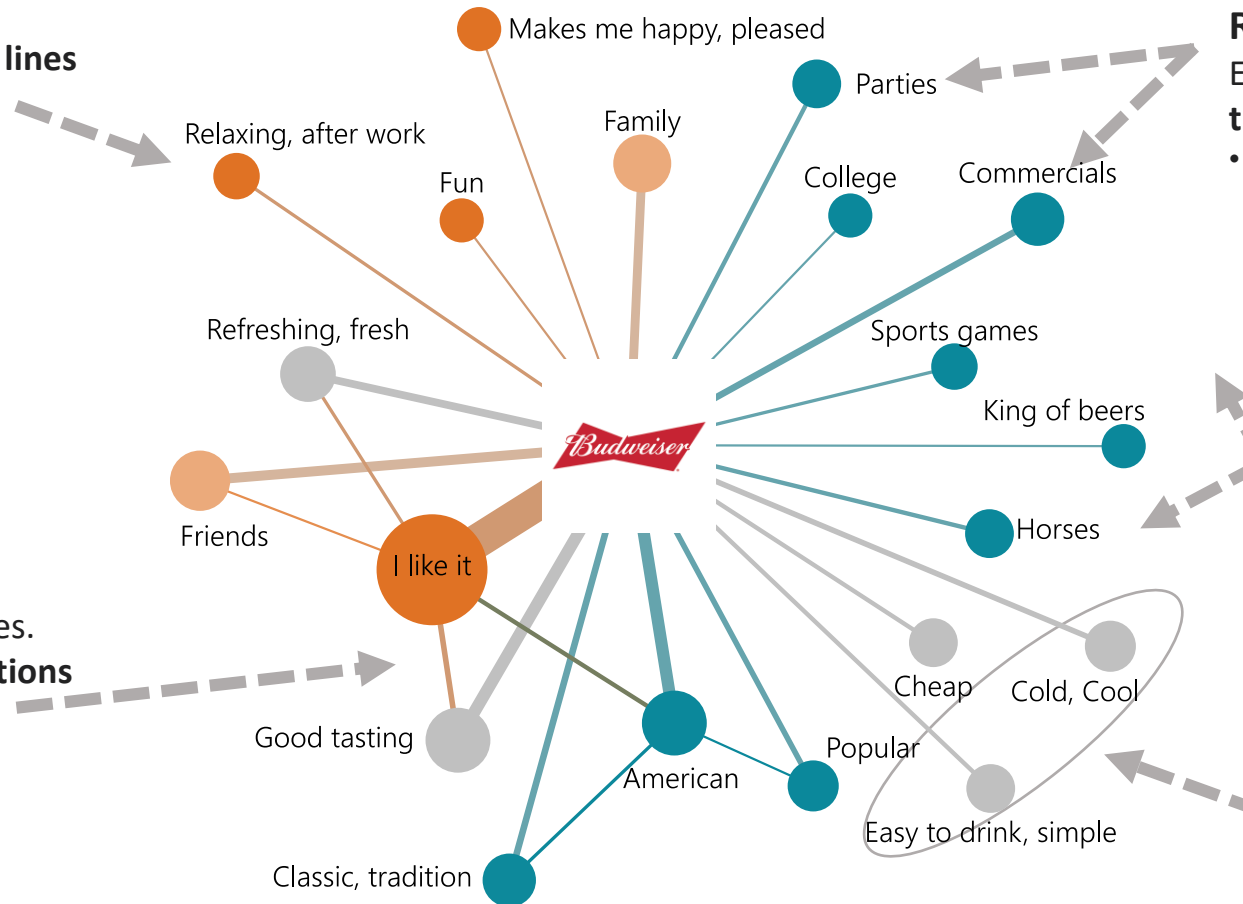
Inter-connections between bubbles. **represent co-occurrences of mentions of a theme:**

- These are themes / associations that respondents mentally link together.

Color coding represents groupings of themes, which can be based on various things:

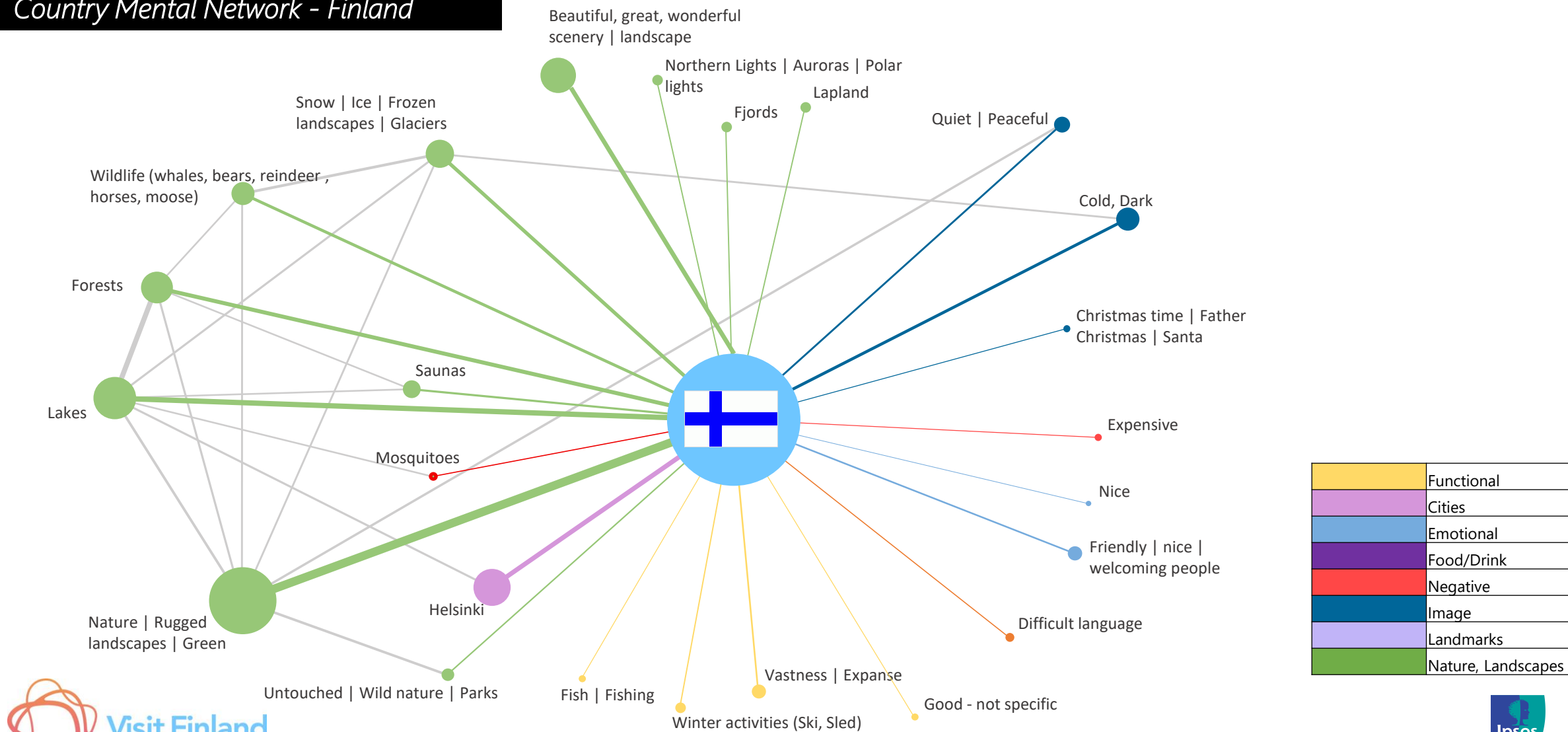
- Sentiment (positive, negative)
- Other groupings (e.g. product related themes vs contextual themes vs emotion themes)

Themes or associations that are closer together are NOT more closely related, UNLESS they are connected by a line.



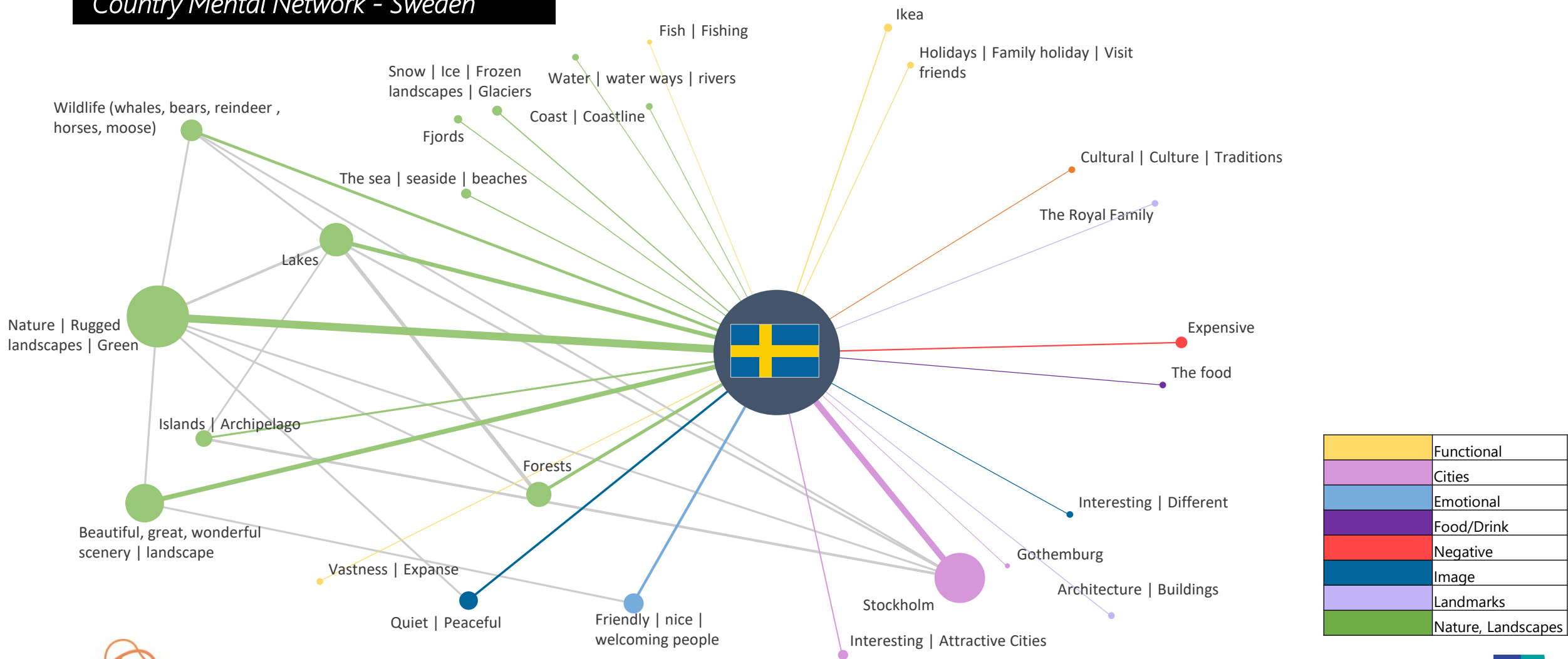
Germans strongly associate Finland with its nature landscapes and features (especially the lakes); which are strongly interconnected. Helsinki comes to mind quite well

Country Mental Network - Finland



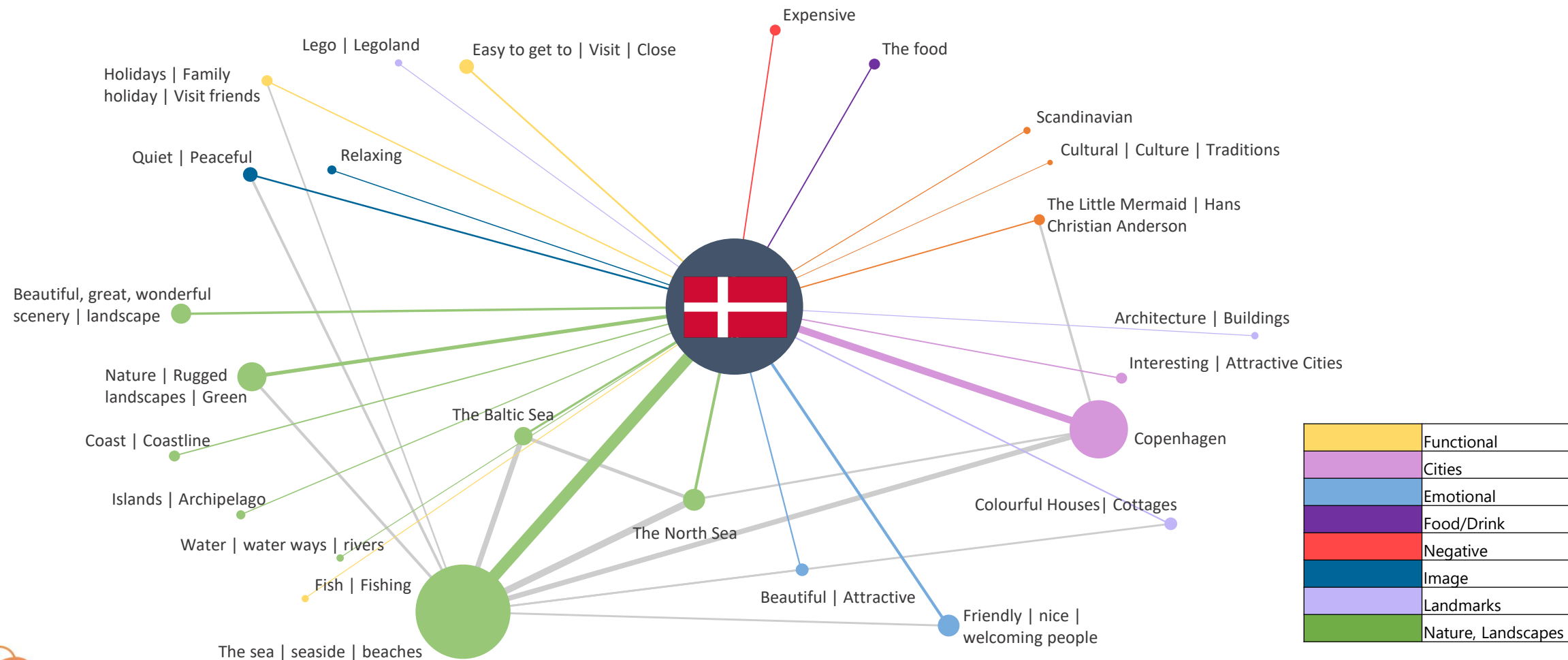
A similar nature/capital picture emerges with Sweden. Inline with higher consideration, Sweden has more associations linked to its cities, culture and friendly people

Country Mental Network - Sweden



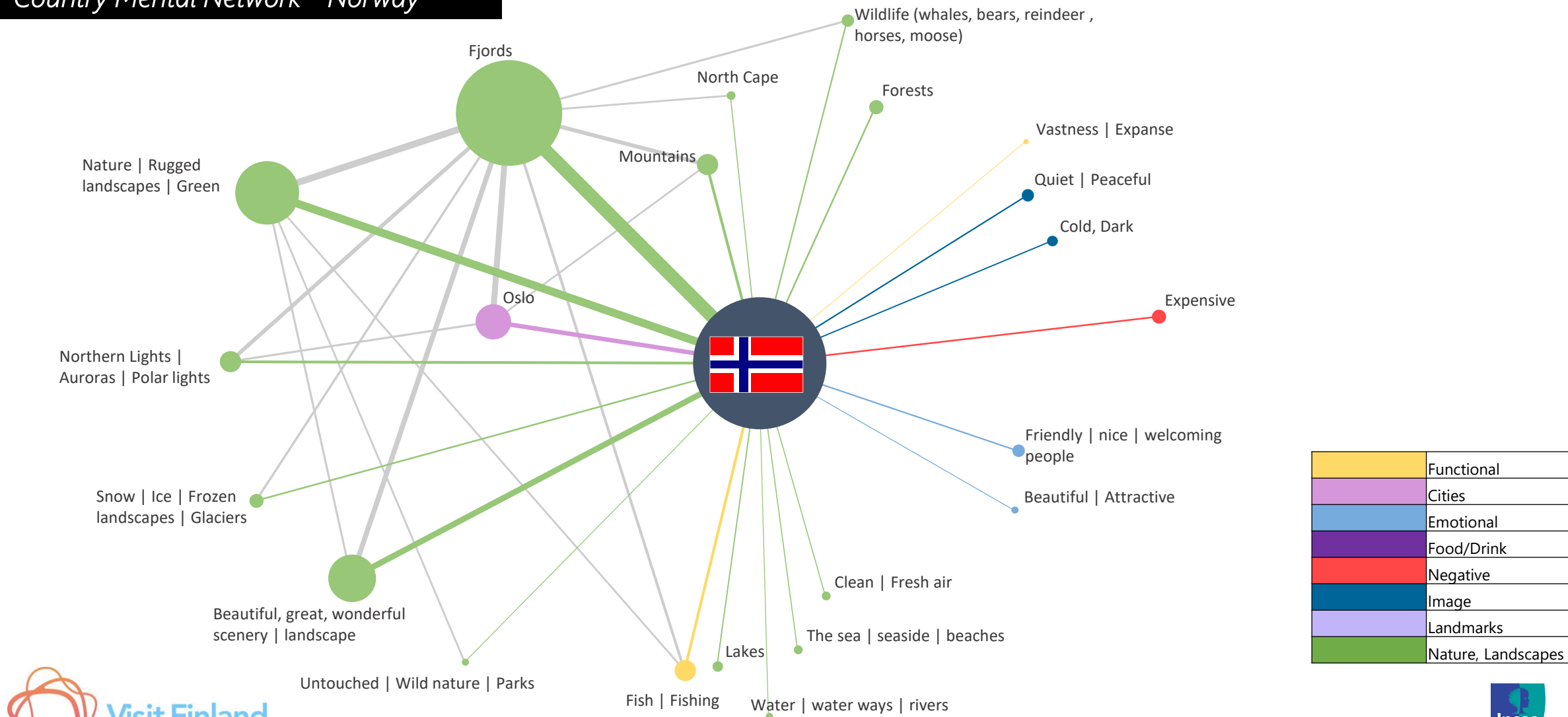
Culture and family associations play a larger role in Denmark, although associations to nature (especially to the sea), and the capital hold the richest and most connected associations

Country Mental Network - Denmark



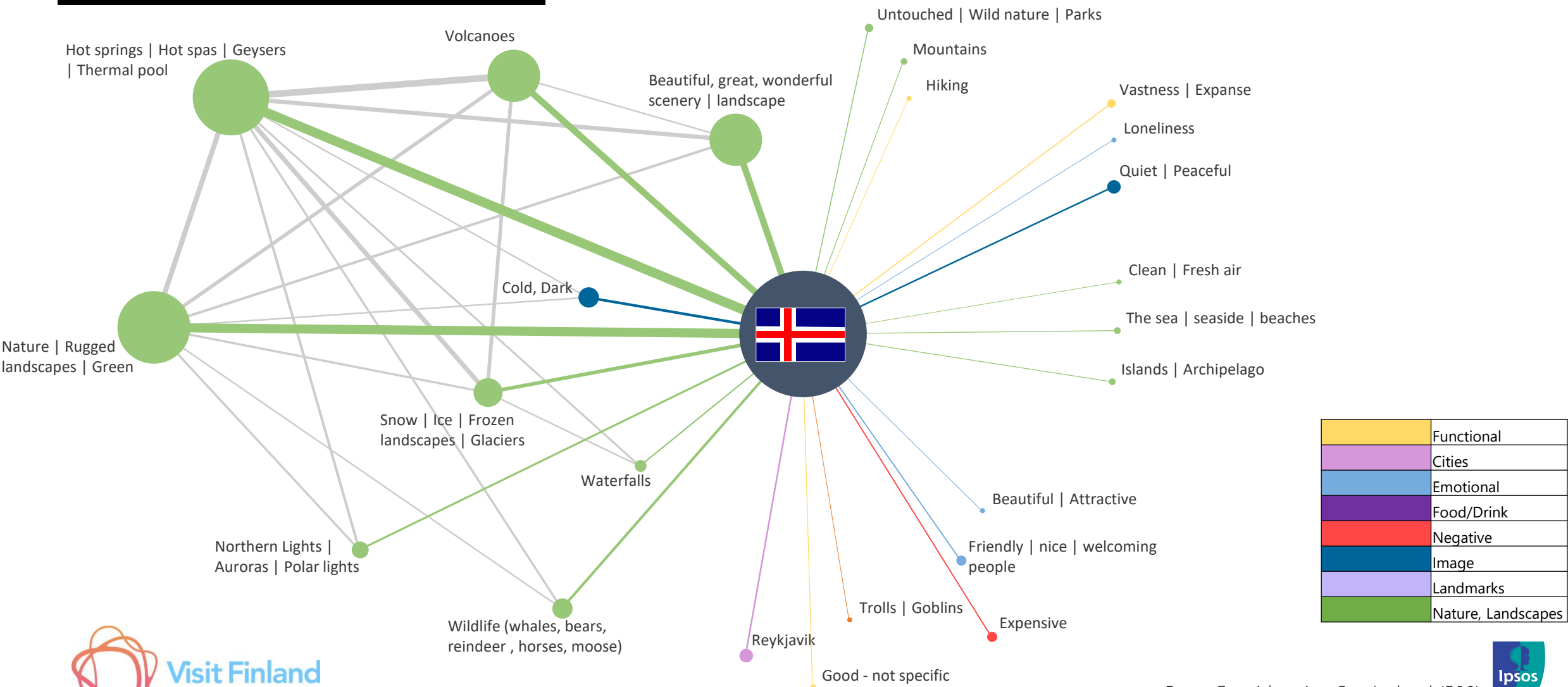
The strongest association to Norway in Germany lies in its fjords. Unlike in Finland, the northern lights are connected to the capital

Country Mental Network - Norway



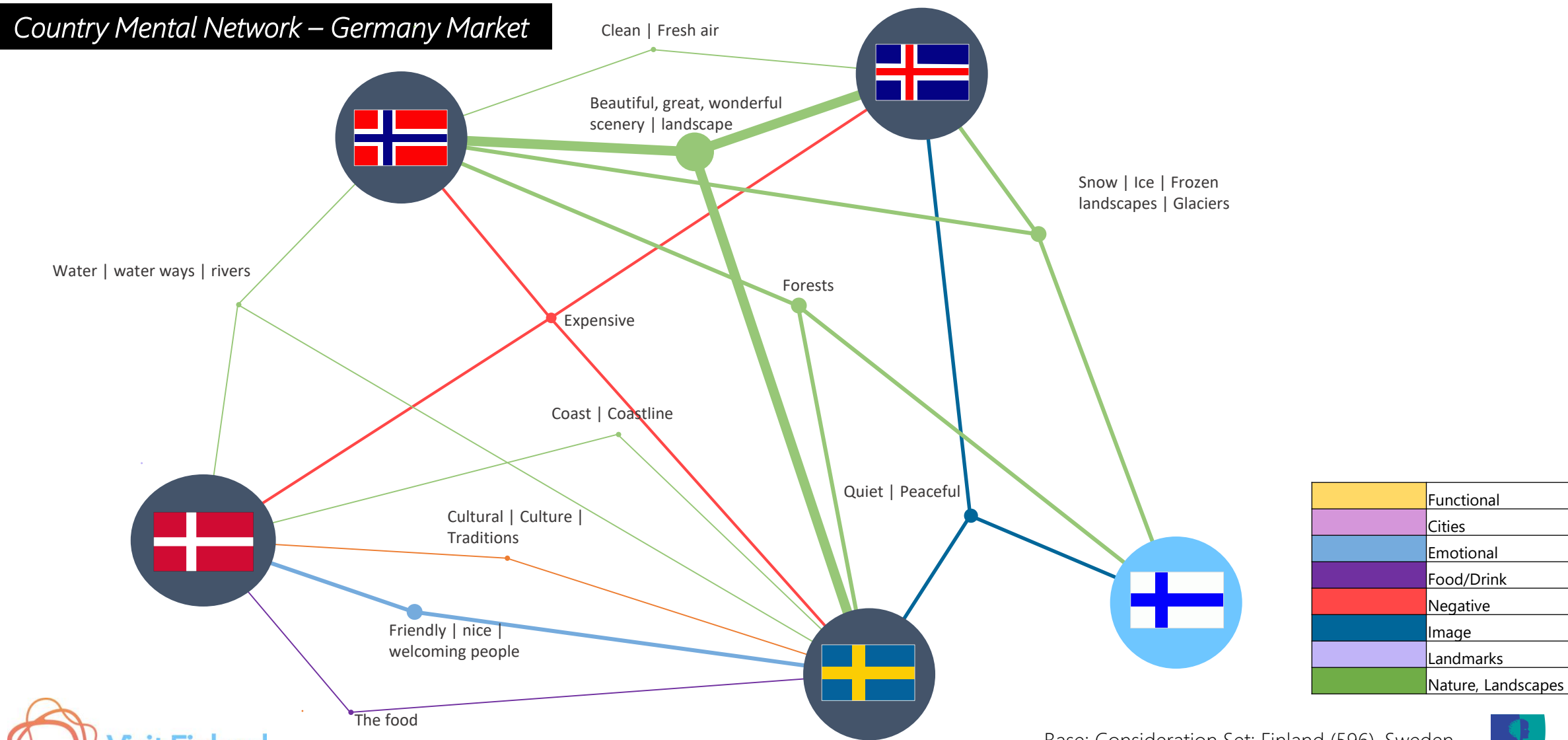
Iceland's unique natural features come through strongly in Germany, with good connections between them. Icelandic cultural associations are not very top of mind

Country Mental Network - Iceland



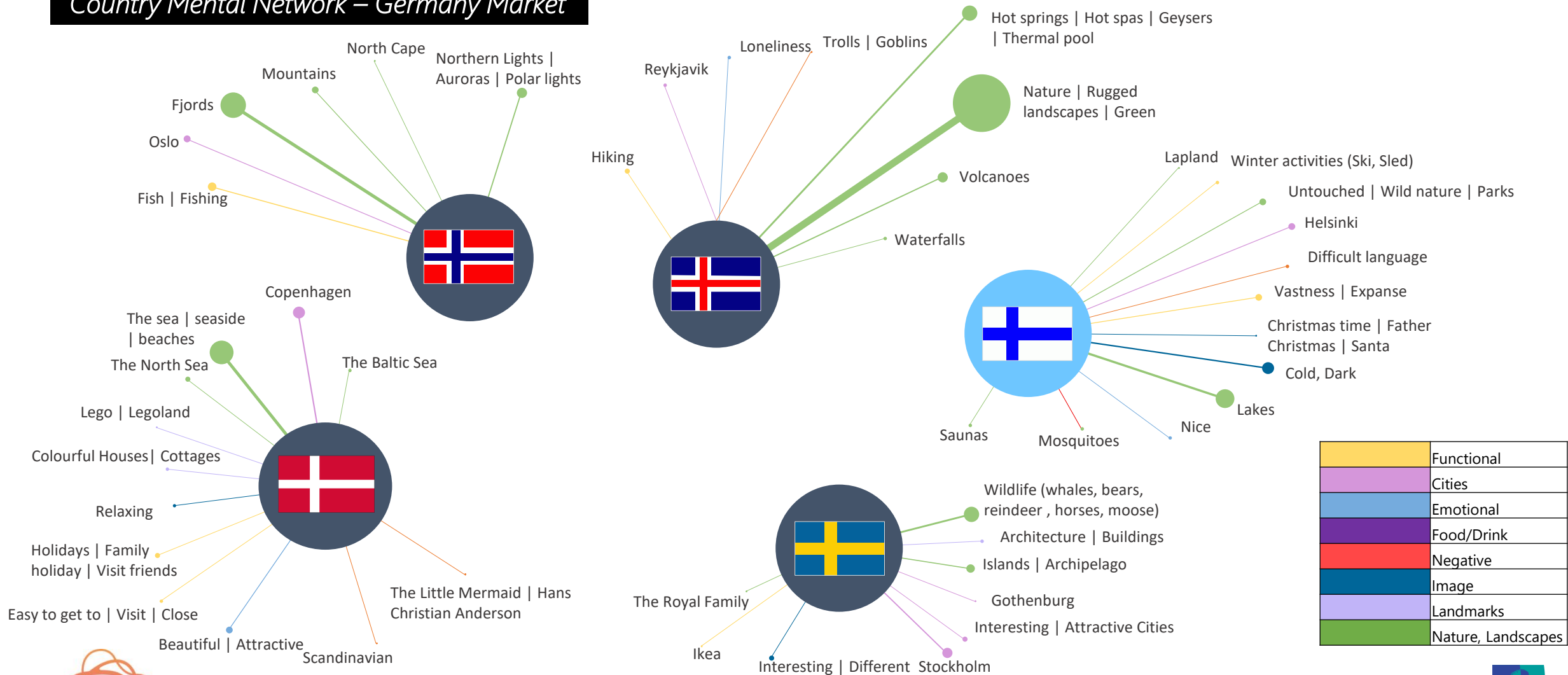
Finland share few associations with its Nordic neighbours. Encouragingly, association with being expensive are not linked to Finland

Country Mental Network – Germany Market



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



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Q9 BMN

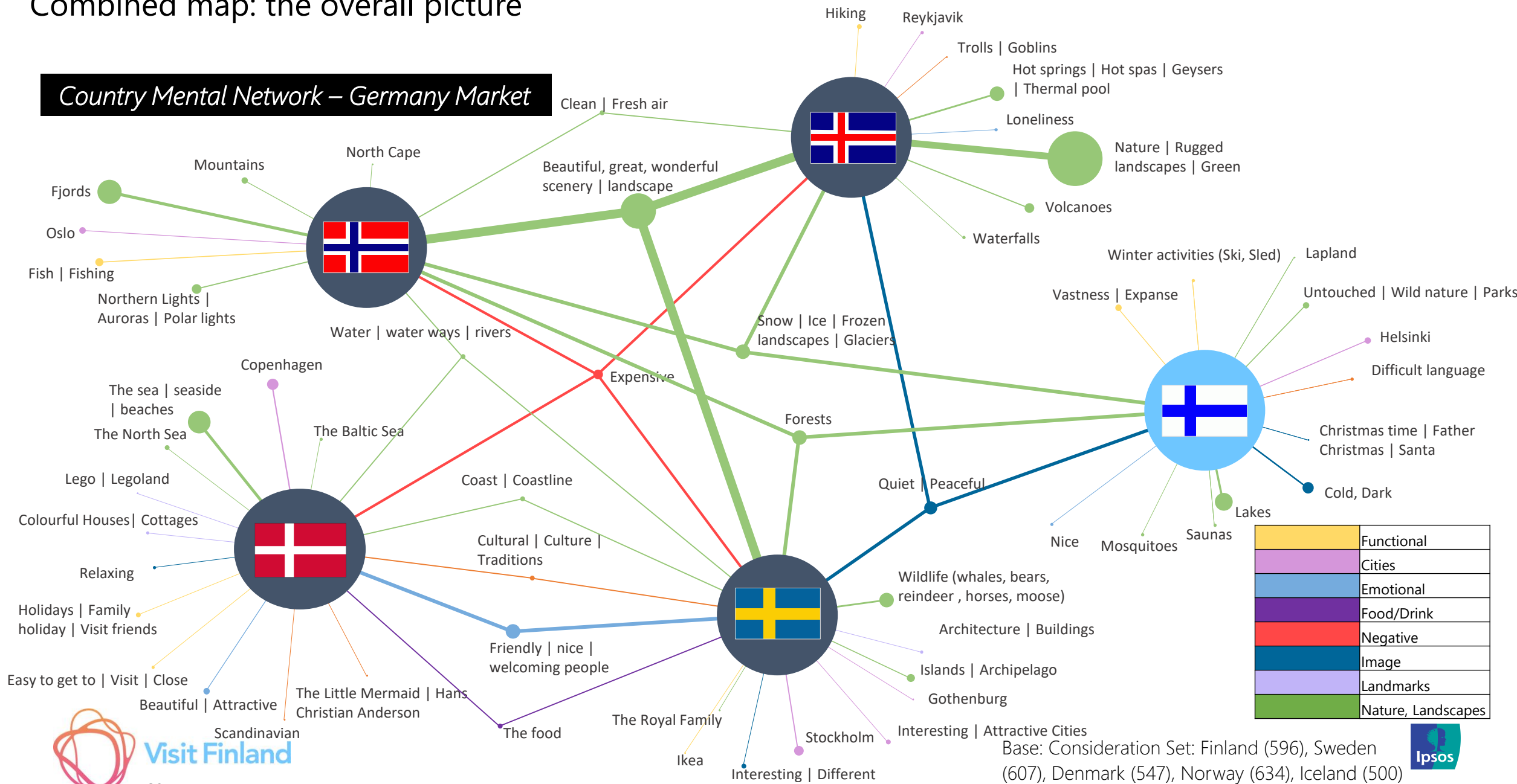
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.

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



Combined map: the overall picture

Country Mental Network – Germany Market



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.

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



Country Mental Network – Competitors

[illegible][illegible][illegible][illegible]

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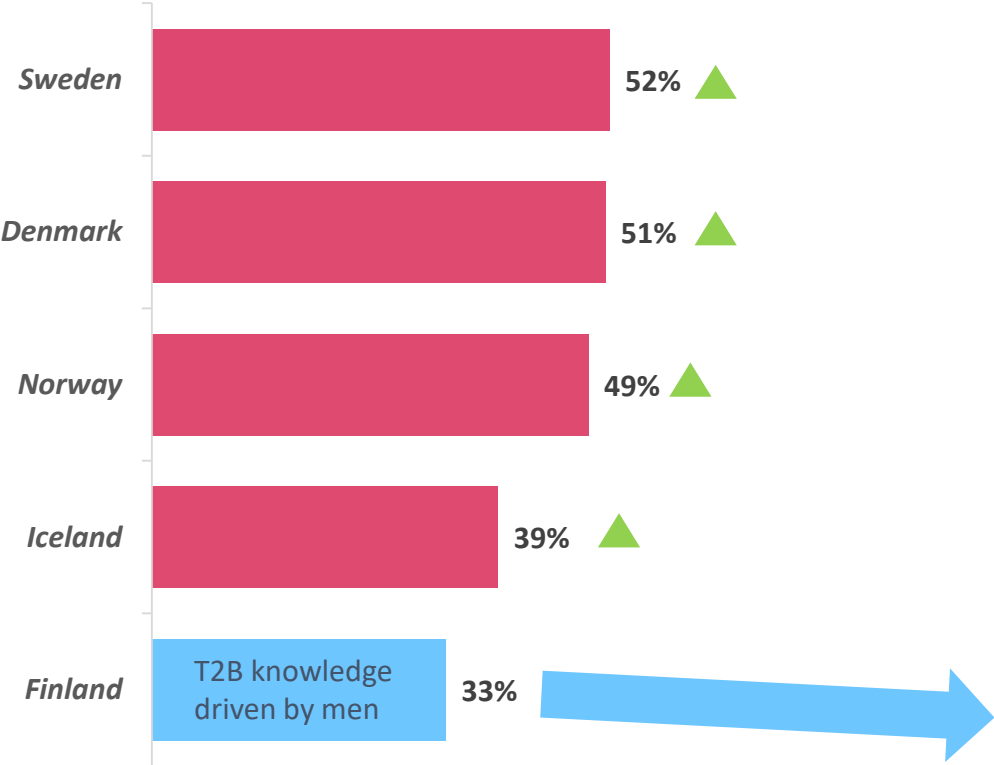
Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.

Base: Consideration Set: Sweden (638),
Denmark (581), Norway (659), Iceland (518)

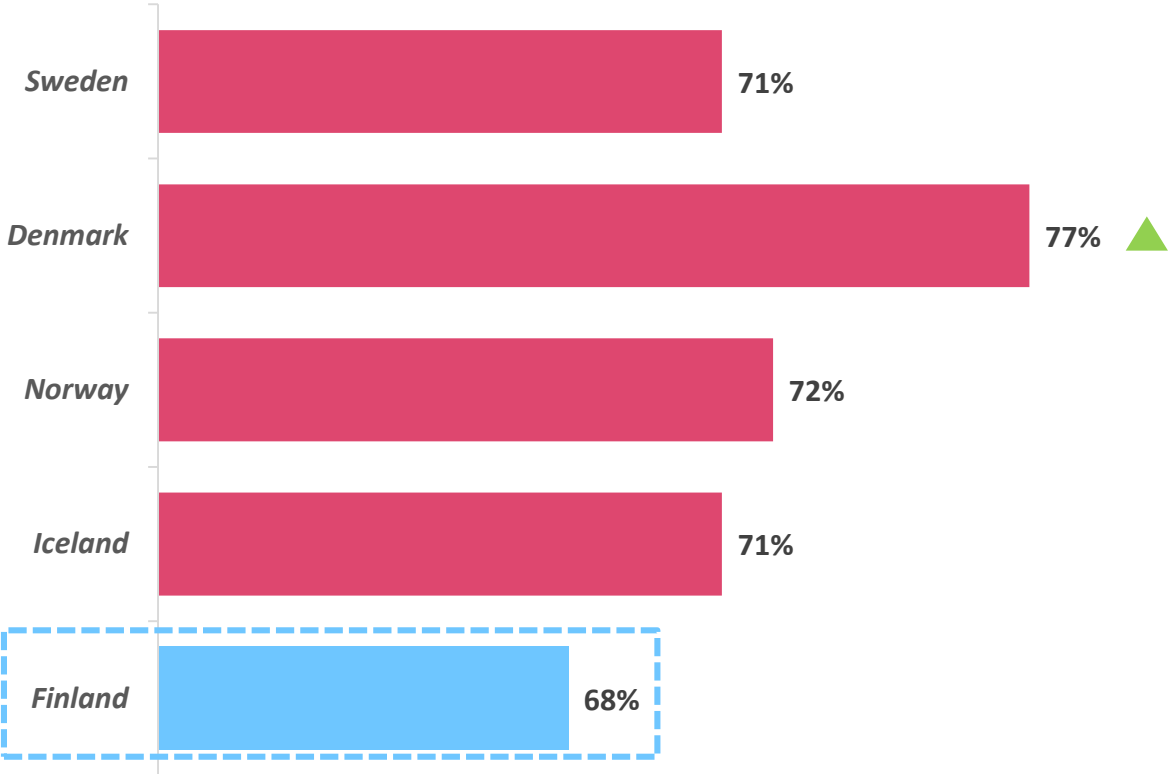


The lower consideration towards Finland as a holiday destination is likely linked to a lack of knowledge of the destination, amongst those with strong knowledge consideration is stronger

Destination Knowledge (T2B)



Claimed visitation to country in the next three years based on more than a fair amount of knowledge of that country



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Q10 DESTINATION KNOWLEDGE
How much do you feel you know about each of these countries as a holiday destination?

Sig diff at 95%
vs Finland

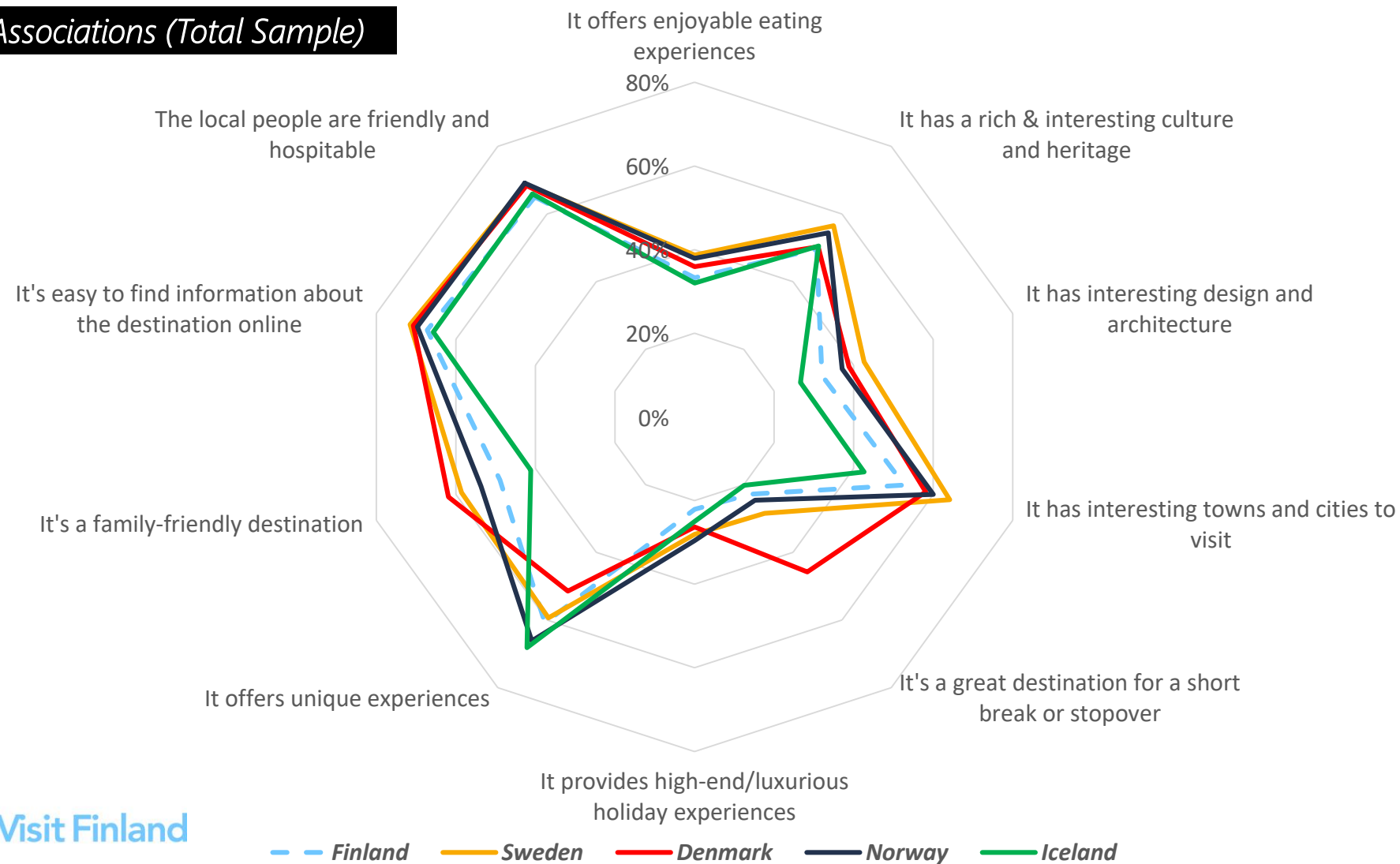


Base: Total Sample (1,000)



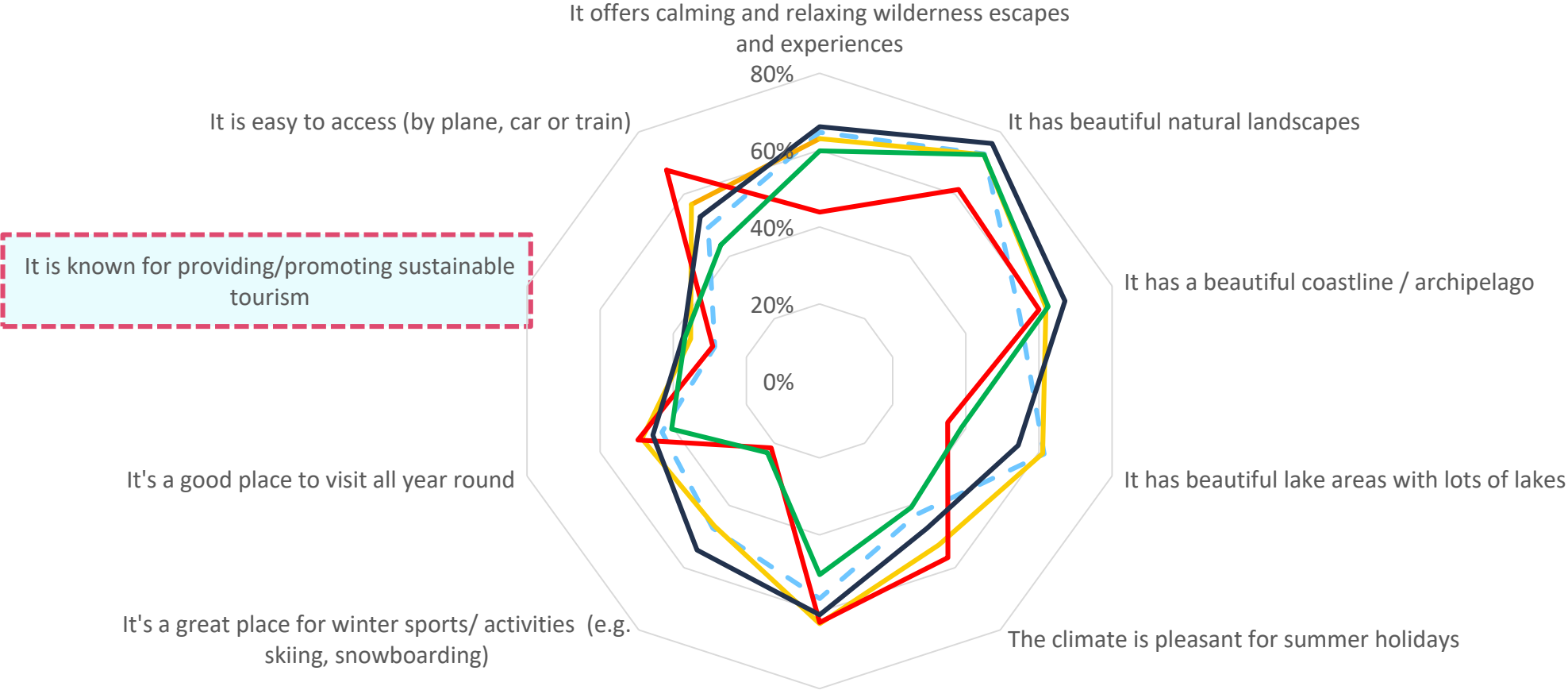
Finland does not stand out much from its Nordic neighbours on imagery perceptions, though do fall slightly behind Sweden, Denmark and Norway in terms of cultural perceptions

Image Associations (Total Sample)



The Nordics, especially Norway, have strong nature associations. Sustainable tourism isn't very well known

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

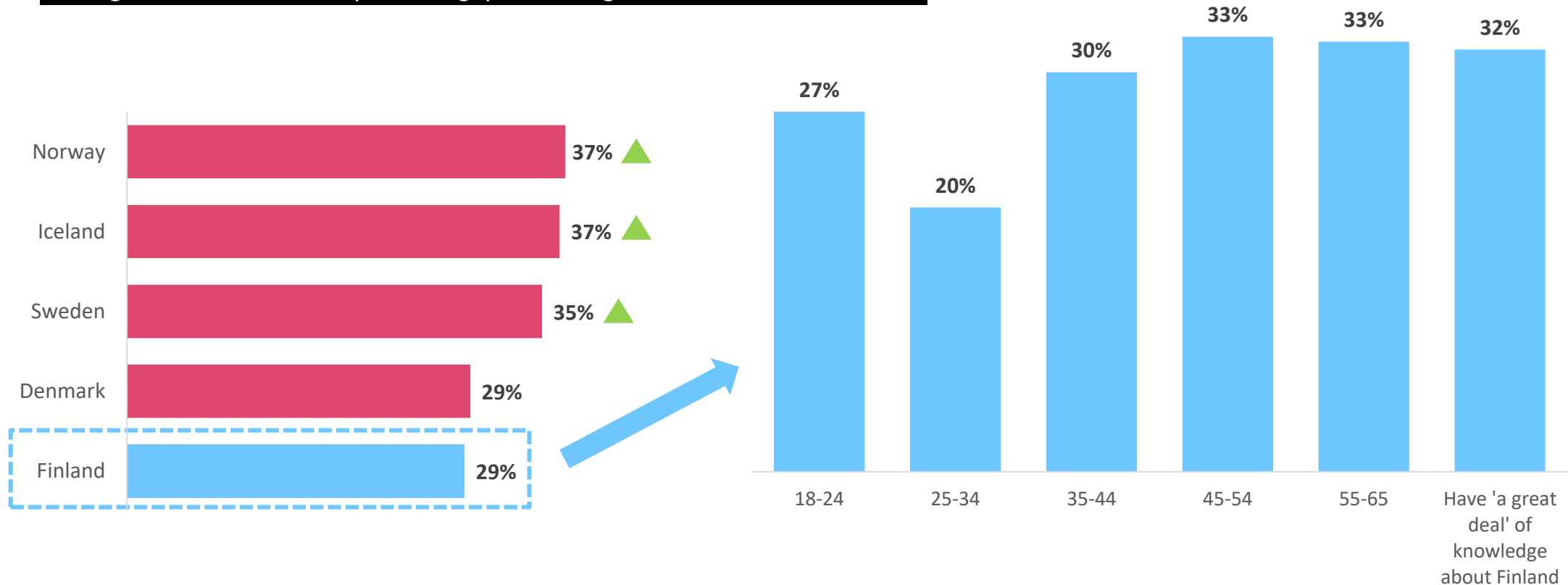
Do you associate any of these holiday destinations with the following statements?

Finland Sweden Denmark Norway Iceland



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



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.



Q23 SUSTAINABILITY

In your opinion, what is meant by a 'sustainable' travel destination?



Activity Associations

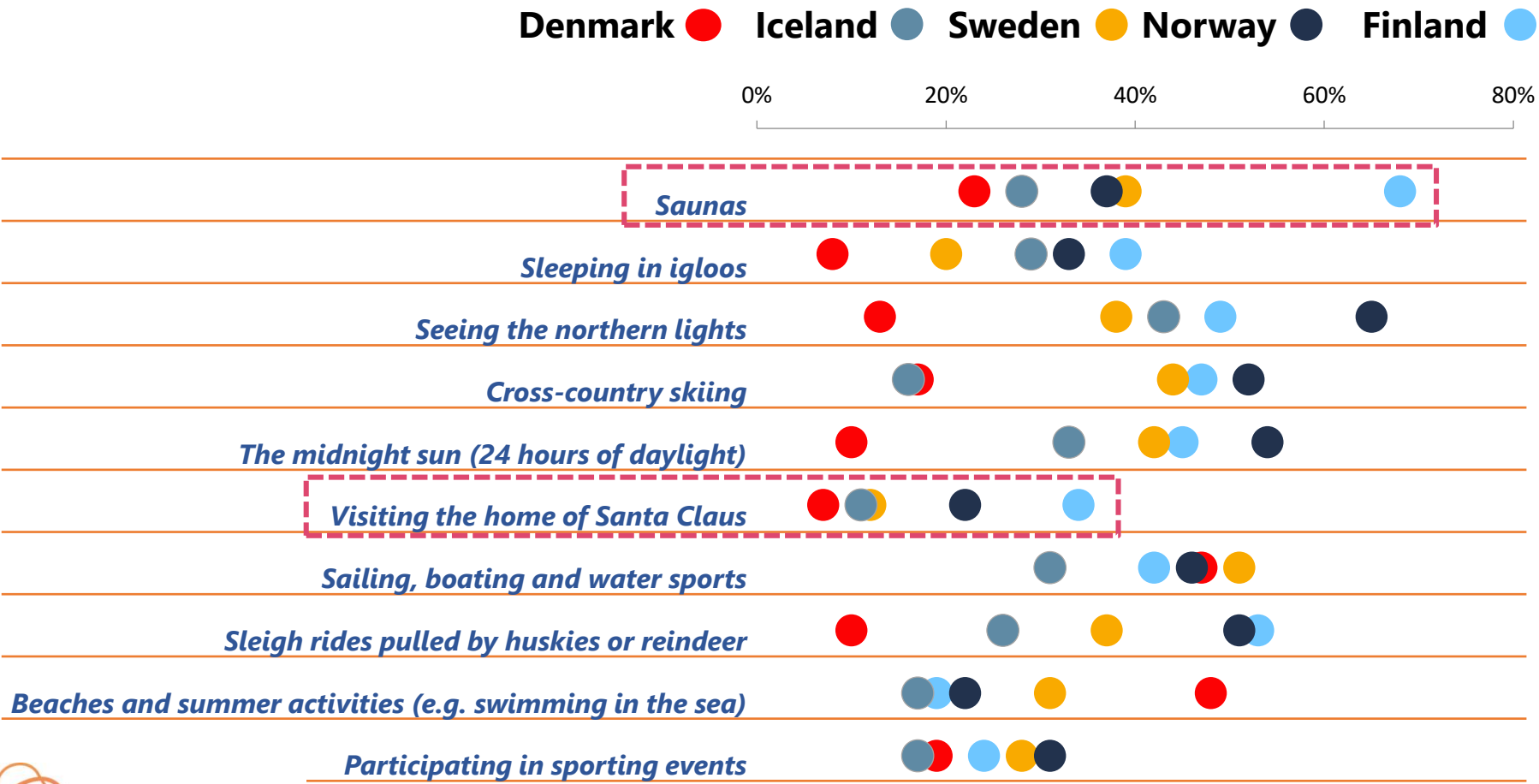


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In terms of activities and experiences associated with Finland, saunas and Santa have strong links with the Germans

Activities Associations



Q15 ACTIVITIES ASSOCIATION

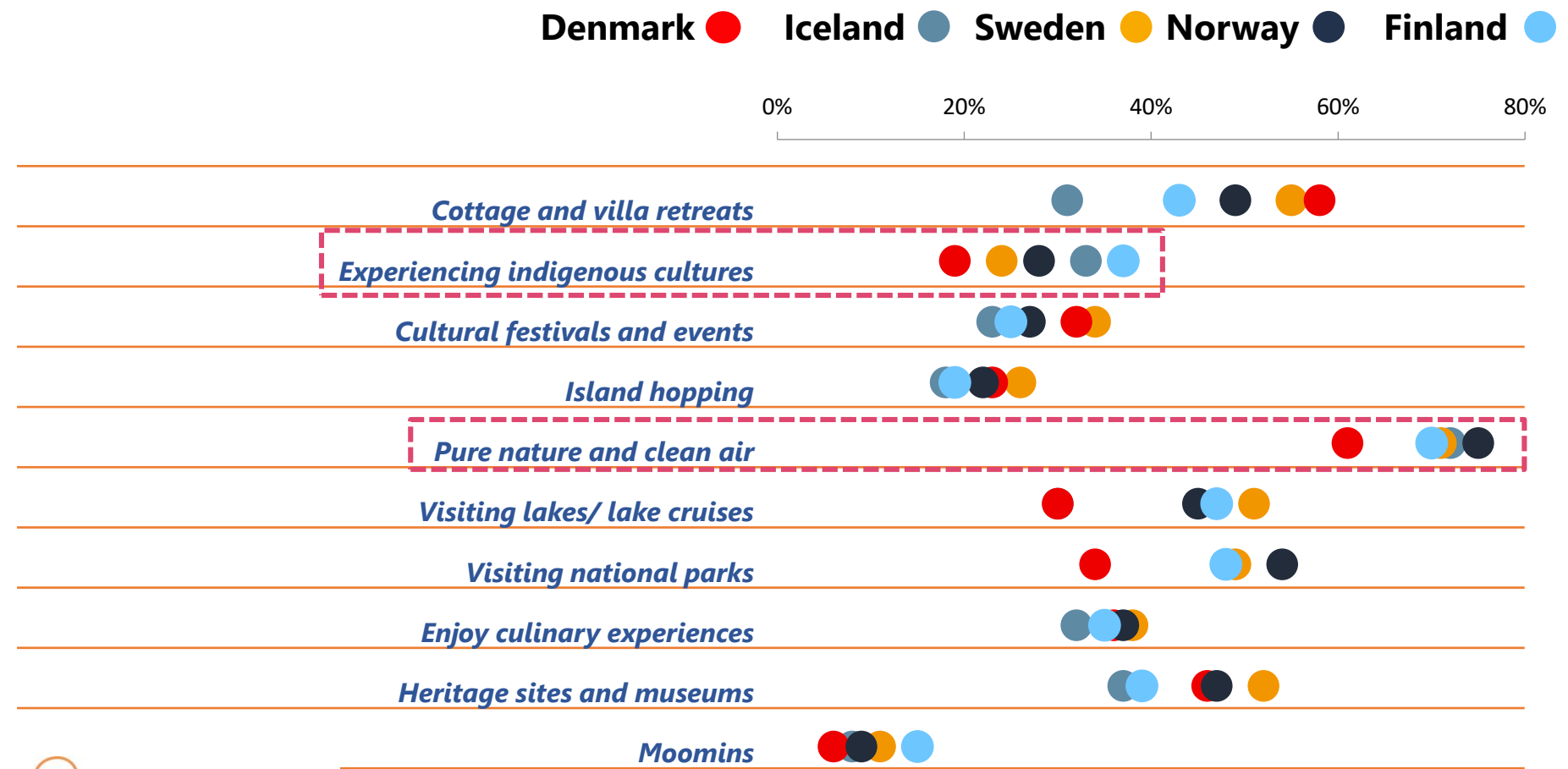
Do you associate any of these holiday destinations with the following activities and experiences?



Base: Total Sample (1,000)

The pure nature and clean air is a clear association with all Nordic countries

Activities Associations



Q15 ACTIVITIES ASSOCIATION

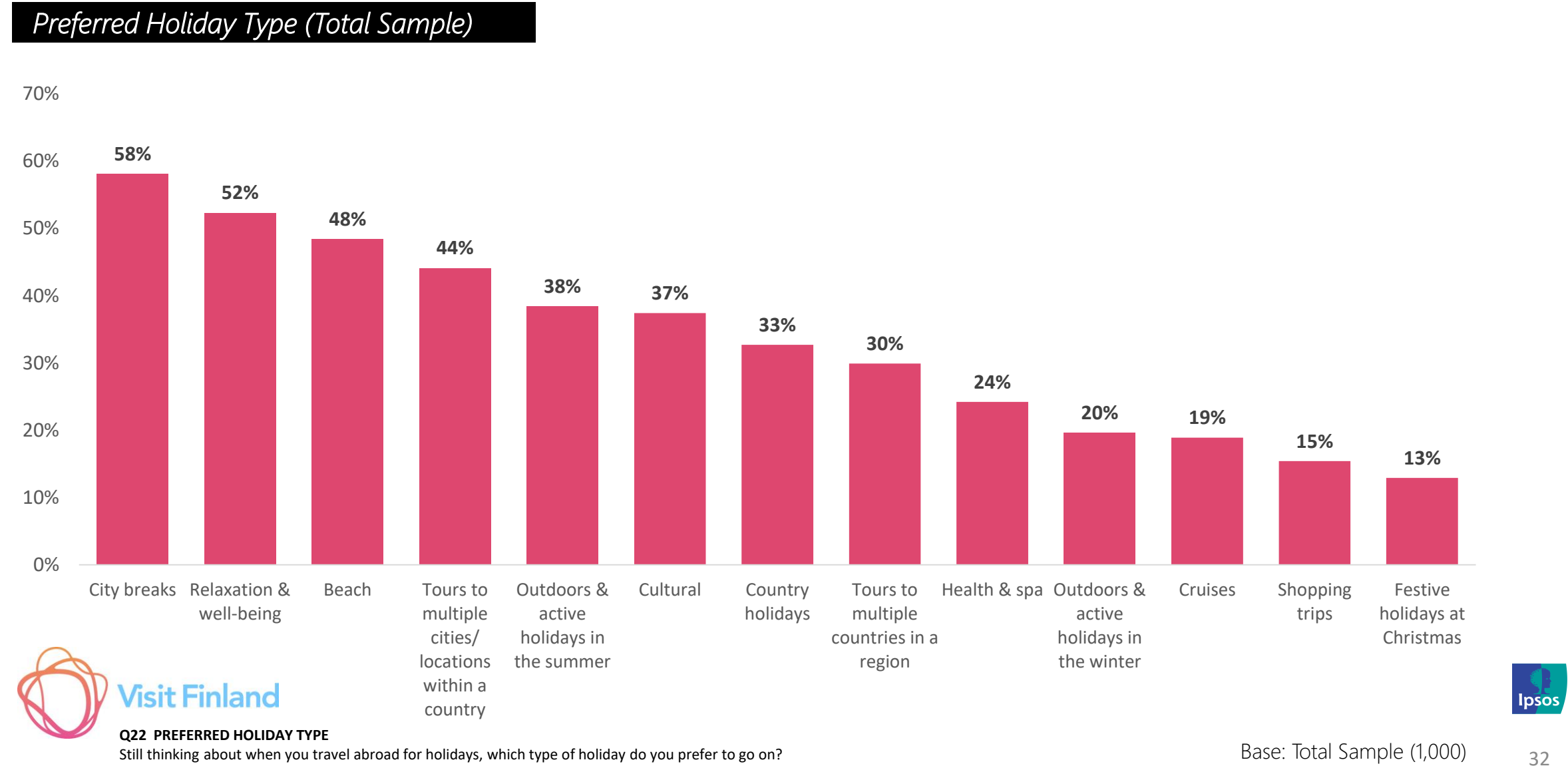
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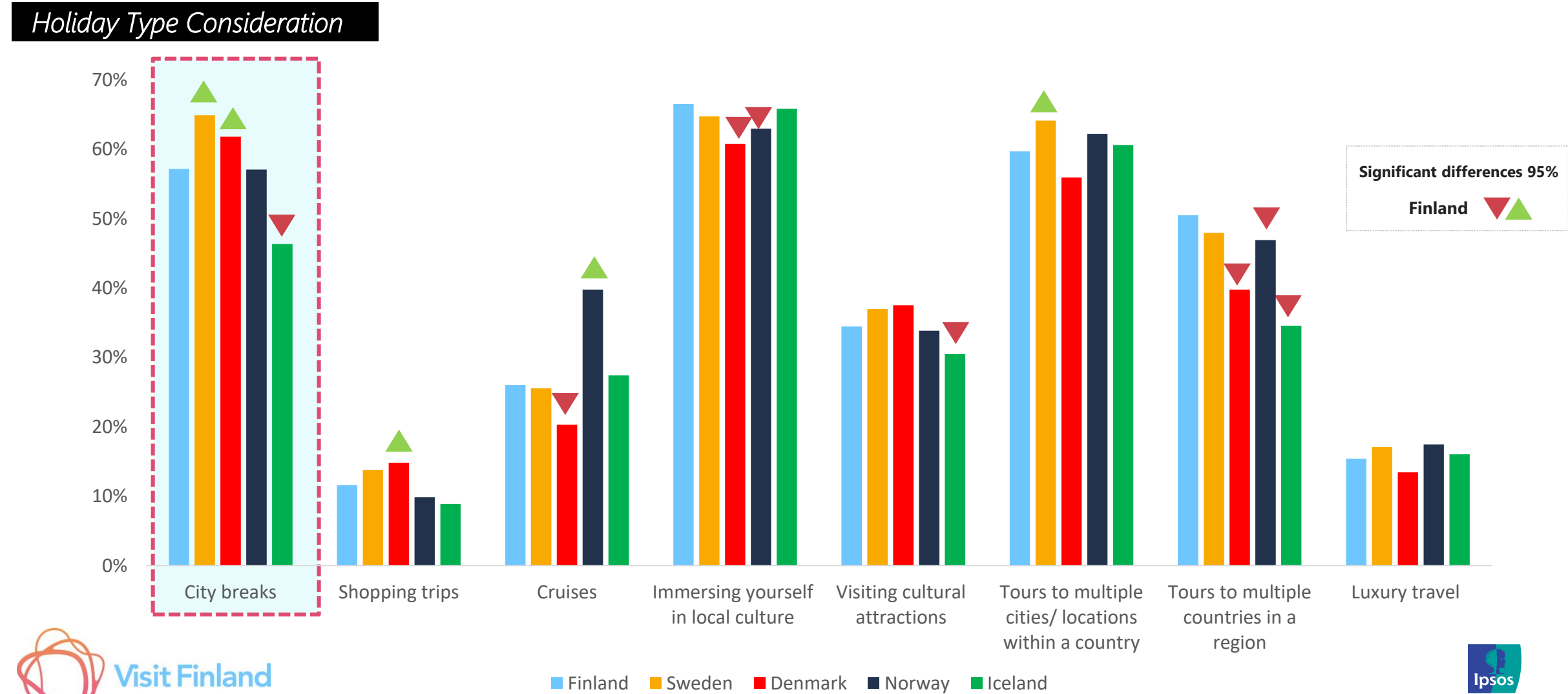
Base: Total Sample (1,000)

How are people visiting us?

The German population most prefer city breaks, relaxation as well as beach holidays when they travel abroad



There is an opportunity to push and promote Helsinki, Tampere and Turku as great city break destinations to attract these type of travellers

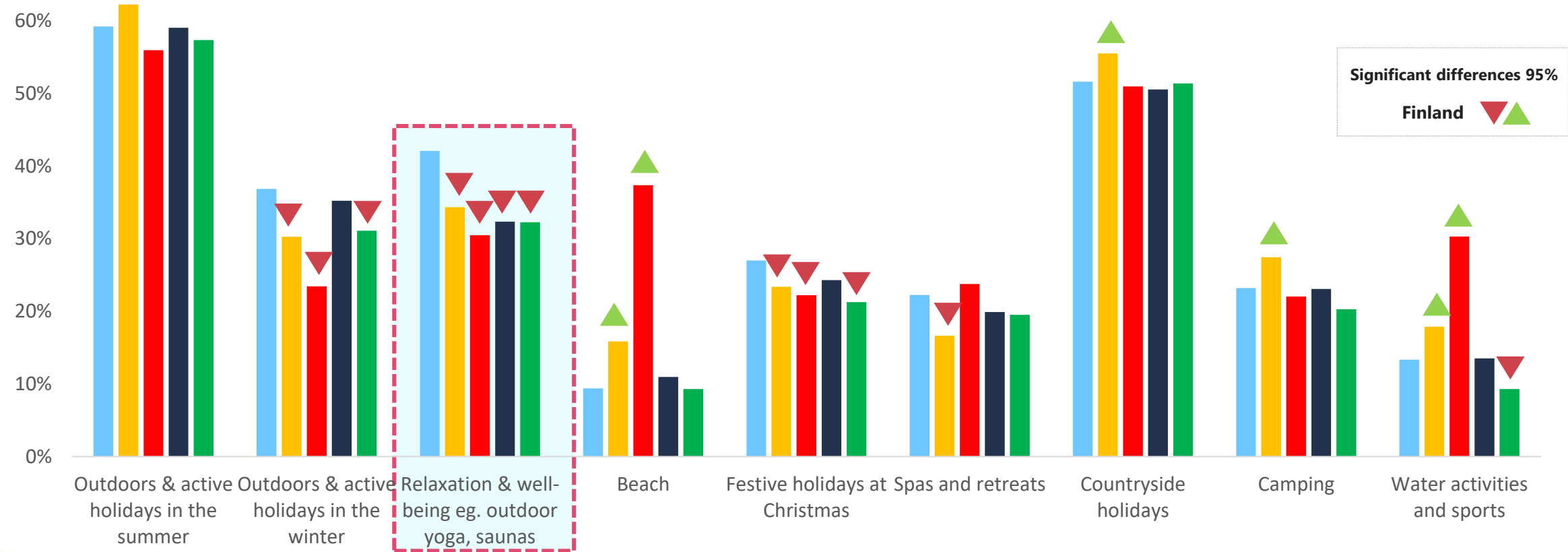


Q12 CONSIDERATION HOLIDAY TYPE

Which of the following types of holiday would you consider for the following destinations? Please select all that apply

There is a clear Finnish advantage for relaxation holidays, a preferred German holiday type. Focus should be placed on capitalising on this

Holiday Type Consideration



Q12 CONSIDERATION HOLIDAY TYPE

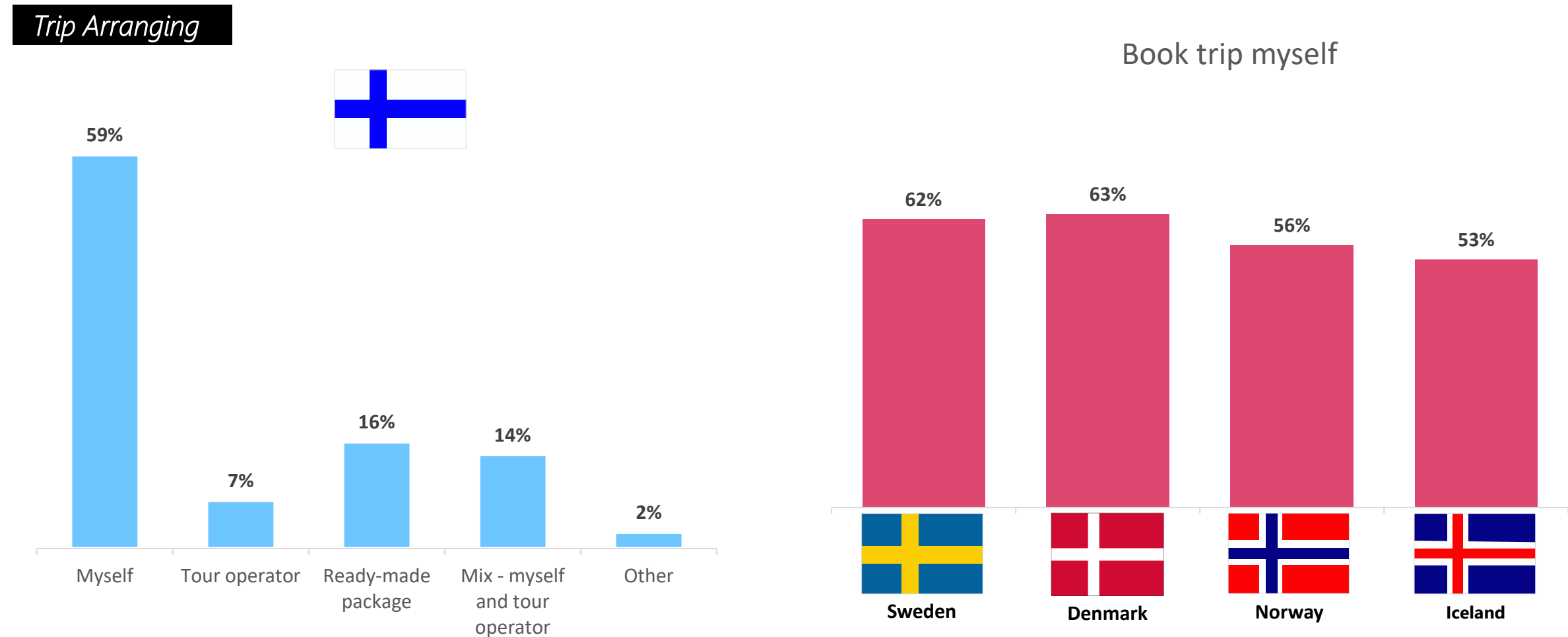
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Finland Sweden Denmark Norway Iceland



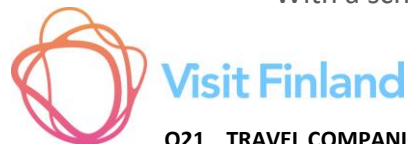
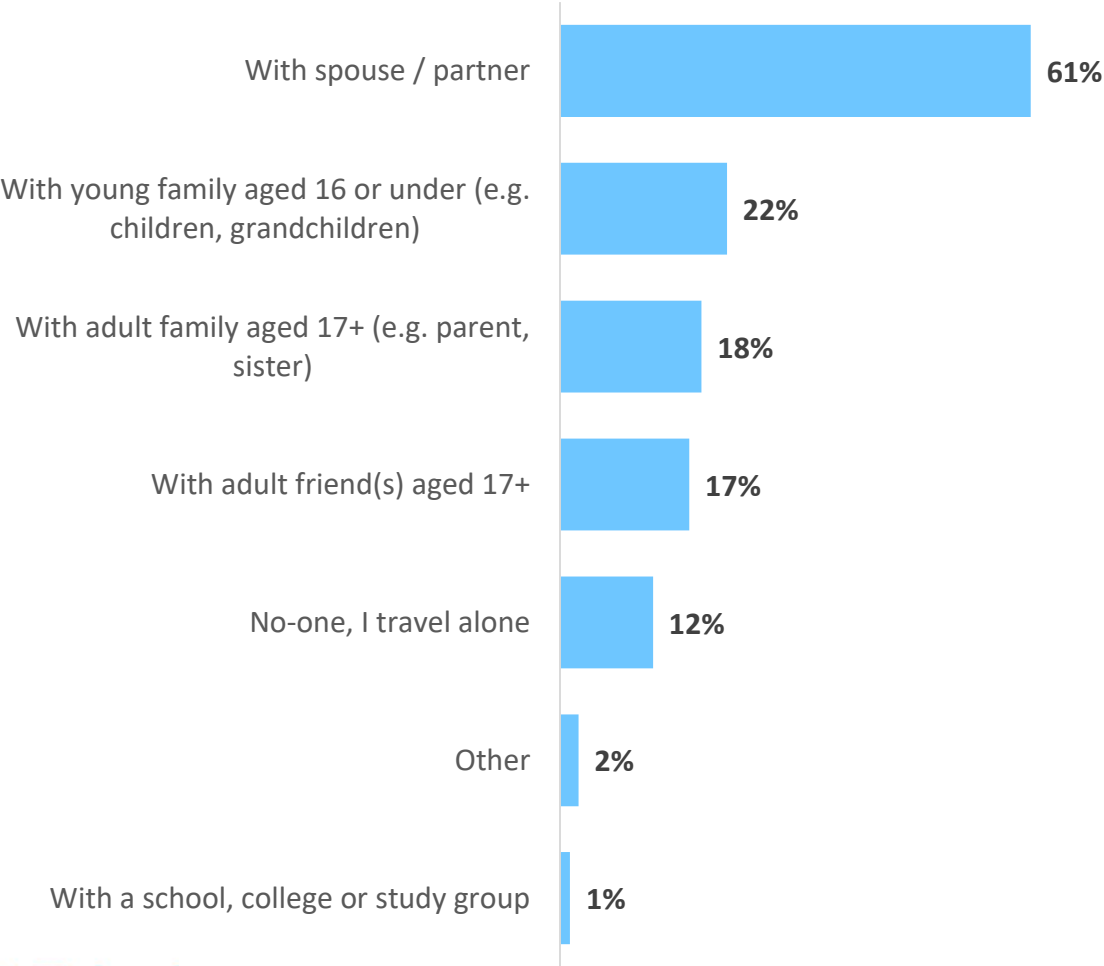
Base: Consideration Set: Finland (630), Sweden (638), Denmark (581), Norway (659), Iceland (518) 34

The majority of people in Germany who are considering visiting the Nordic countries plan and make the bookings themselves.



Most people in Germany travel with their spouse or partner

Travel Companion



Q21 TRAVEL COMPANION
When you travel abroad for holidays, who do you usually travel with?



Base: Total Sample (1,000)

Summary & Recommendations

Summary and Final Thoughts

- 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



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