

Reiseanalyse 2024: The potentials of Finland and its image as a holiday destination on the German market

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- » Visit Finland has commissioned this report to find out about the position and potentials of Finland on the German holiday travel market.
- » This report is following and updating previous reports from the years 2021, 2019 and 2016.
- » The central aim is to get a thorough and complete picture on the volume, the structure, the attitudes and developments of the market potential in Germany, in order to provide a sound basis for the future strategic planning concerning marketing efforts, product development and communication on this market.
- » With the 2024 report it is possible to look again at the image of Finland as a holiday destination and comparing the findings with 2021 and 2016.
- » Basis for the analyses in this report is the German **Reiseanalyse 2024**, the most established syndicated study on holiday travel demand in Germany. The results are complemented with an ad-hoc study, deep-diving into the plans of potential travellers to Finland.
- » The Reiseanalyse is a representative survey of the holiday travel behaviour of Germans and German-speaking foreign nationals living in Germany, their related attitudes, motivations and interests. The survey describes and analyses **holiday trips with a length of 5 days** and more as well as **short breaks with a length of 2 to 4 days**. The RA has been carried out yearly since 1970.
- » **RA face-to-face survey:** Representative for the German-speaking population aged 14 years and above, living in private households in Germany (sampling method: random route). In January 2024, more than 7,000 persons were interviewed personally in their household about holiday-related aspects.
- » **Deep-dive Finland:** To be able to go even more in detail regarding potential travellers to Finland, 1,000 online interviews with a length of 10 minutes were conducted in an ad-hoc study, representative for potential travellers to Finland, Sweden and Norway. The interviews took place end of June/ beginning of July 2024.



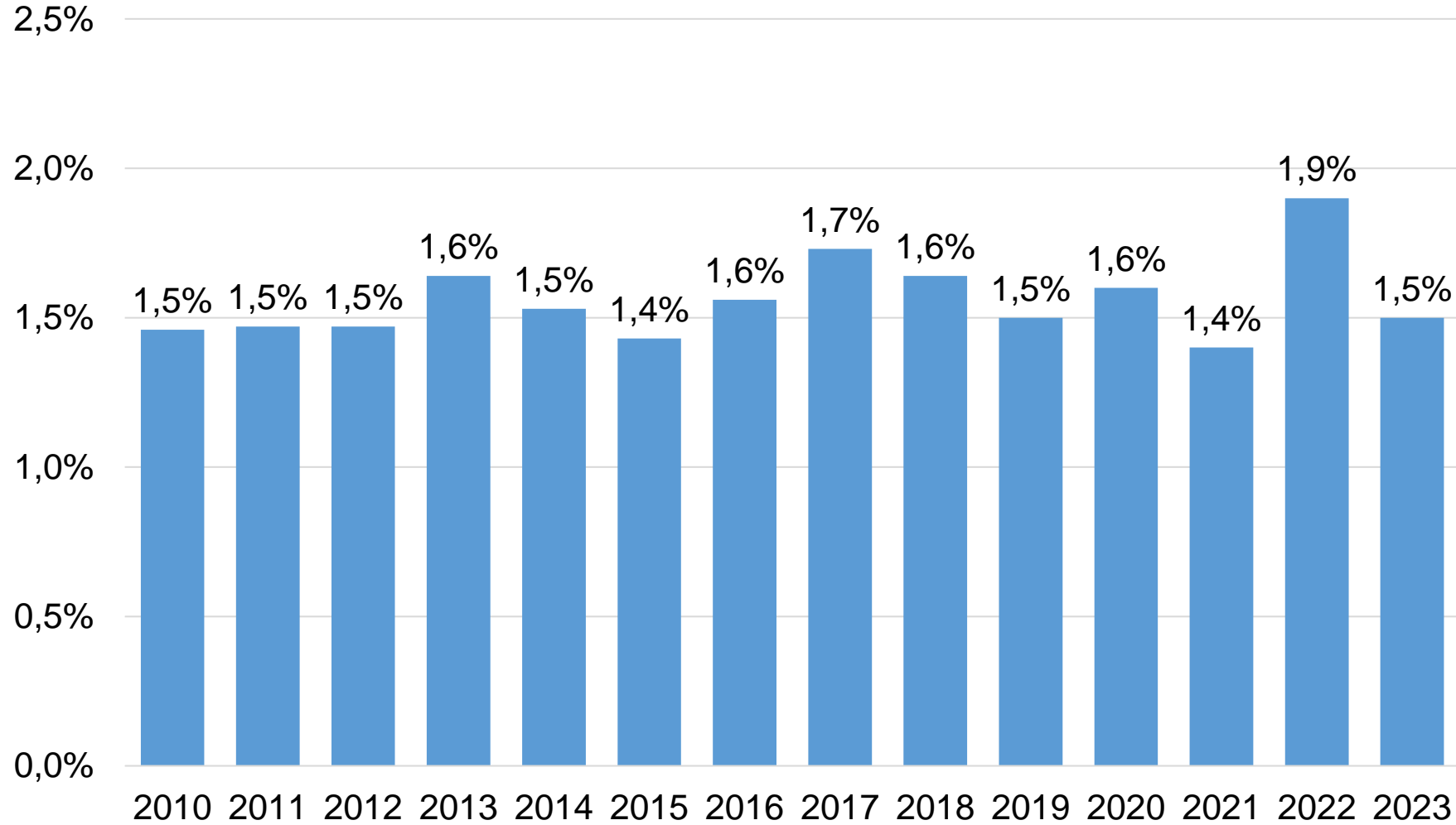
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A close-up photograph of a person's hands, wearing a blue long-sleeved shirt and a white apron, meticulously arranging a bouquet of wildflowers. The bouquet includes purple, pink, and white blossoms on green stems. The background is a bright, sunlit field of yellow wildflowers, creating a bokeh effect. The scene is captured in a warm, natural light, suggesting a sunny day in a meadow.

1. Interest/experience in Germany
to travel to Nordic destinations

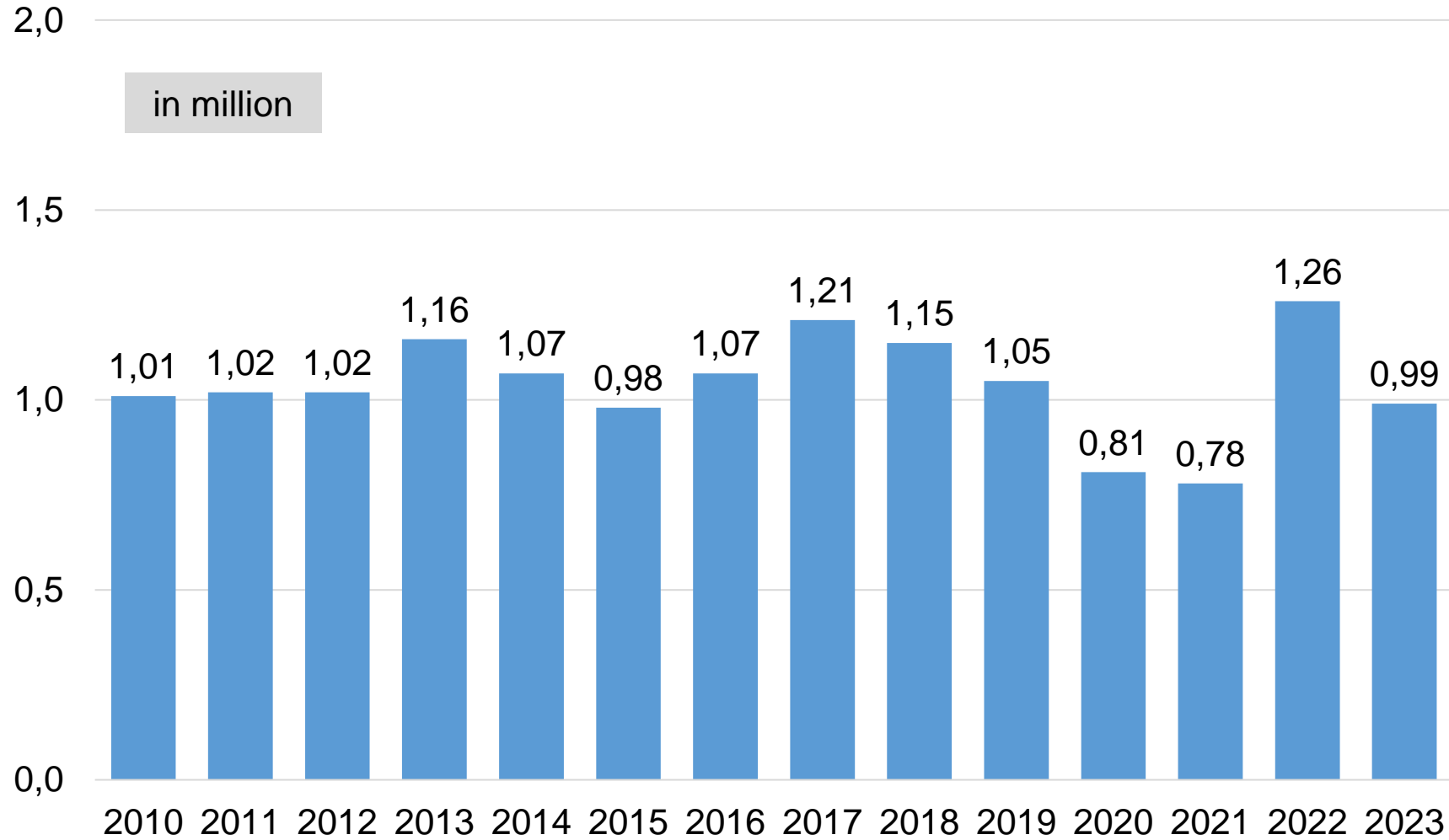
Holiday trips 5+ days to Scandinavia: Market share of SWE, NOR & FIN in 2023 is 1.5% of all holiday trips



- » 1.5% of all holiday trips 2023 (5+ days) of the population in Germany went to Scandinavia (Finland, Sweden, Norway).
- » During the last 10 years the market share of Scandinavia has been quite stable around 1.6%, with a peak of 1.9% in 2022.

Basis: Holiday trips (5+ days) of German/German speaking population; Source: Reiseanalyse 2011-2024

Holiday trips 5+ days to Scandinavia: One million holiday trips of the Germans went to SWE, NOR & FIN in 2023



- » Around 1 million holiday trips in 2023 (5+ days) of the population in Germany went to Scandinavia (Finland, Sweden, Norway).
- » This is less than in 2022 and around the same level as before the COVID pandemic.

Interest to travel to FINLAND: 3.5 million Germans are generally interested to travel to Finland between 2024-2026

Finland last 3 years

0.5 % (0.3 million)

of the population in Germany (aged 14+) have been to Finland on holiday or short holiday in the years 2021-2023

Finland next 3 years

5.0 % (3.5 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 2024-2026.

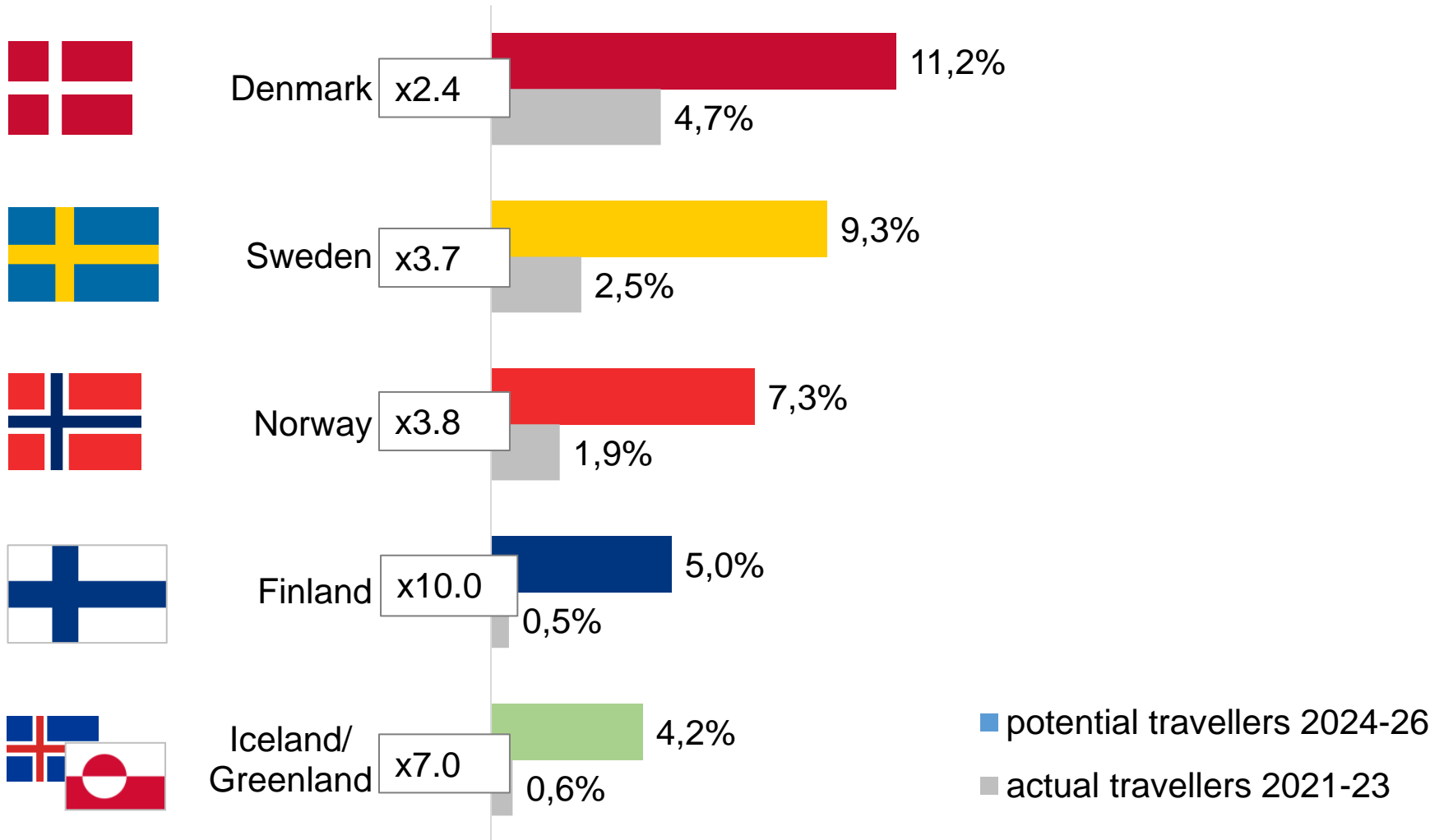
Interest for Finland 10x bigger than experience
→ space for marketing

- » 5.0% (3.5 million) of the German population is interested in travelling to Finland in the next three years, 0.5% (0.3 million) have been visiting Finland in the past three years.
- » The interest to travel to Finland is 10 times higher than the actual demand → This is the "room to manoeuvre" for tourism marketing.
- » *Attention: Due to changes in the questionnaire, these figures cannot be compared to previous Reiseanalyse editions.*

"In which of these countries have you spent a holiday during the last three years (that is 2021, 2022 or 2023)?"

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) 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 2024

Interest to travel to FINLAND: Share of actual and potential guests compared with competitors in Northern Europe



- » Compared with its competitors in the North, Finland comes fourth in interest, after Denmark, Sweden and Norway.
- » Regarding the ratio of potential vs. actual guests, the rule is: The “smaller” the destination, the bigger this factor.
- » Denmark’s potential is 2.4x bigger than its actual market share.
- » The potentials of Sweden and Norway are almost 4x higher than their actual market shares.
- » The potentials of Finland and Iceland/Greenland are respectively 10x higher and 7x higher than their actual market shares.

“In which of these countries have you spent a holiday during the last three years (that is 2021, 2022 or 2023)?”

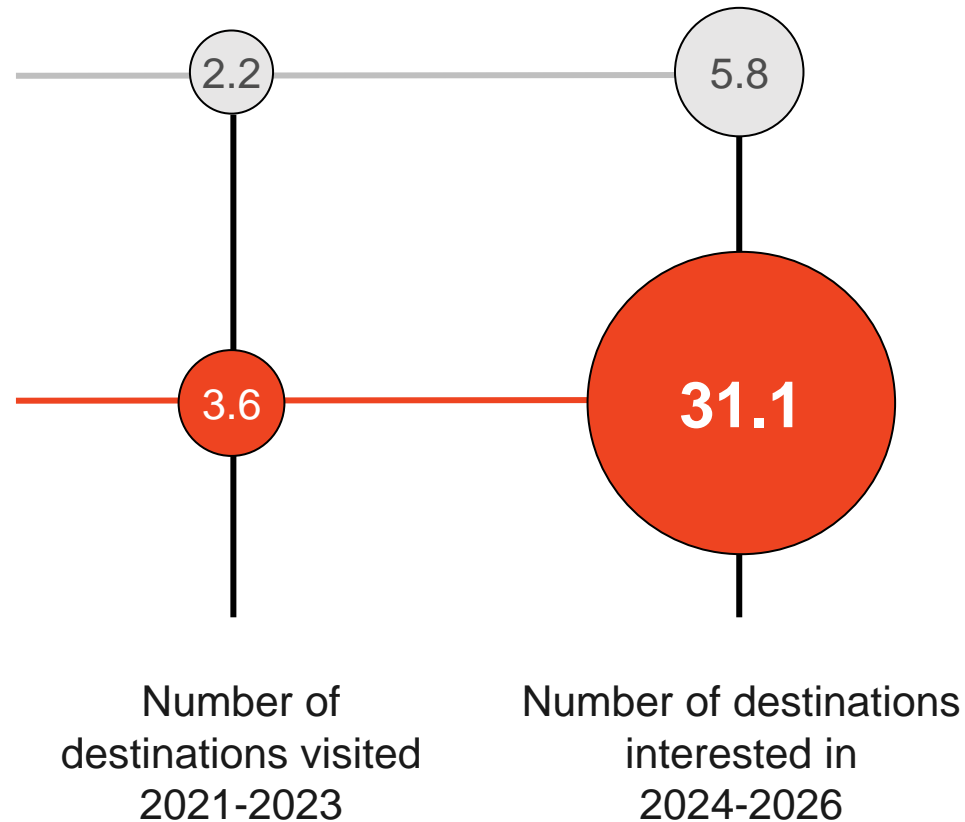
“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) And which of these countries would you generally consider as a holiday destination in the next three years?” Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024



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

Population

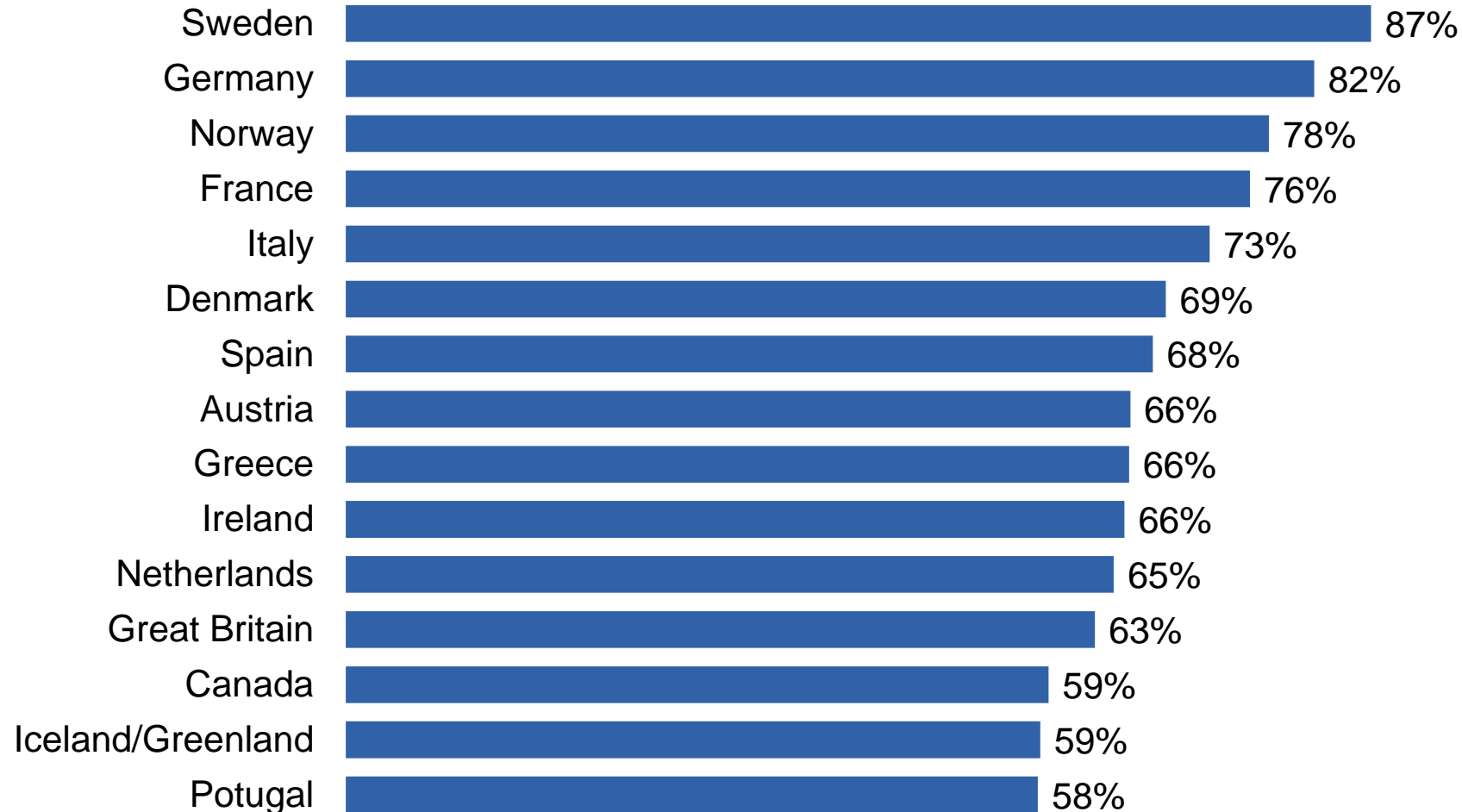
Potential travellers to Finland



- » The average person living in Germany has been to an average of 2.2 holiday destinations in the last 3 years and is interested to visit 5.8 holiday destinations in the next 3 years (out of a set of 59 international destinations).
- » Potential guests to Finland have been to 3.6 destinations and are interested in 31.1 (!)
- » This clearly shows the very fierce competition, that Finland is facing on the German market.
- » Finland has made it into the consideration set of these persons, but has to compete against 30 other destinations!

Competition for FINLAND: Potential guests to Finland have many alternative destinations on their minds

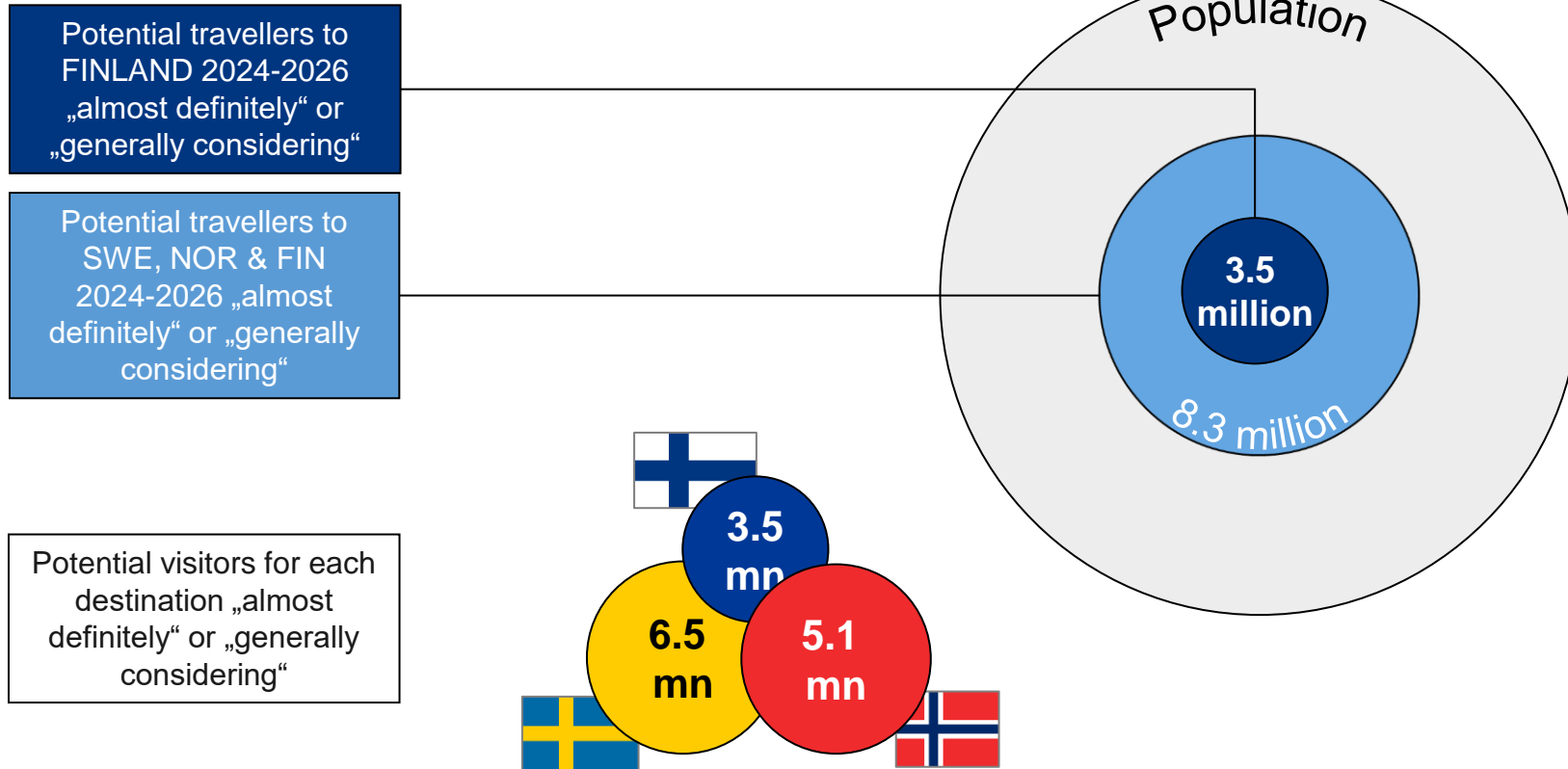
People, interested to go to Finland 2024-2026 for a holiday also would go to ...



- » As described earlier, 3.5 million Germans are „almost definitely planning“ or „generally considering“ a holiday in Finland 2024-2026.
- » 87% of these persons also would like to visit Sweden in the same time, 82% Germany, 78% Norway.
- » The high ranks of France, Italy, Denmark, Spain, Austria, Greece, etc. show that Finland is in competition with destinations around the globe. Nevertheless, some of Finland’s main competitors are its “neighbours” in Scandinavia.
- » This list again highlights the fierce competitive situation of Finland on the German market.

Basis: Persons interested to travel to Finland 2024-2026 (“almost definitely planning” or “generally considering”) in German-speaking population 14+ years in Germany; Set of 45 destinations abroad. Source: Reiseanalyse 2024

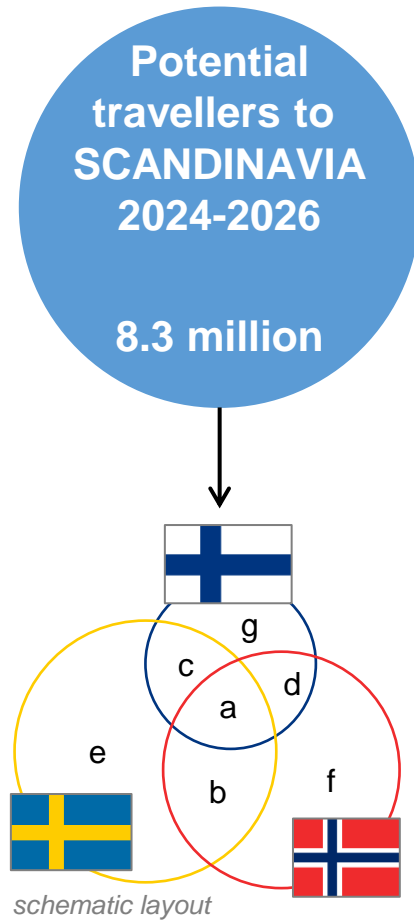
Competition for FINLAND: Volumes of potential guests for Finland, Norway and Sweden










- » As described earlier, the total volume of persons in Germany who are „almost definitely planning“ or „generally considering“ a holiday in Finland 2024-2026 is equal to 3.5 million.
- » The volume of potential guests to Norway is equal to 5.1 million, the volume of potential guests to Sweden, 6.5 million.
- » The combined volume of potential guests to FIN, NOR & SWE is 8.3 million. This indicates once more that there must be a significant amount of persons who are interested to travel to more than one of the three destinations at the same time.

“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) And which of these countries would you generally consider as a holiday destination in the next three years?”, Set of 46 destinations worldwide; Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024

Competition for FINLAND: Overlapping of the potential guests for FIN, NOR & SWE



	Basis: 8.3 million potential travellers to SCANDINAVIA 2021-2023	%	million
a		31	2.6
b		13	1.1
c		5	0.4
d		1	0.1
e		29	2.4
f		16	1.3
g		5	0.4

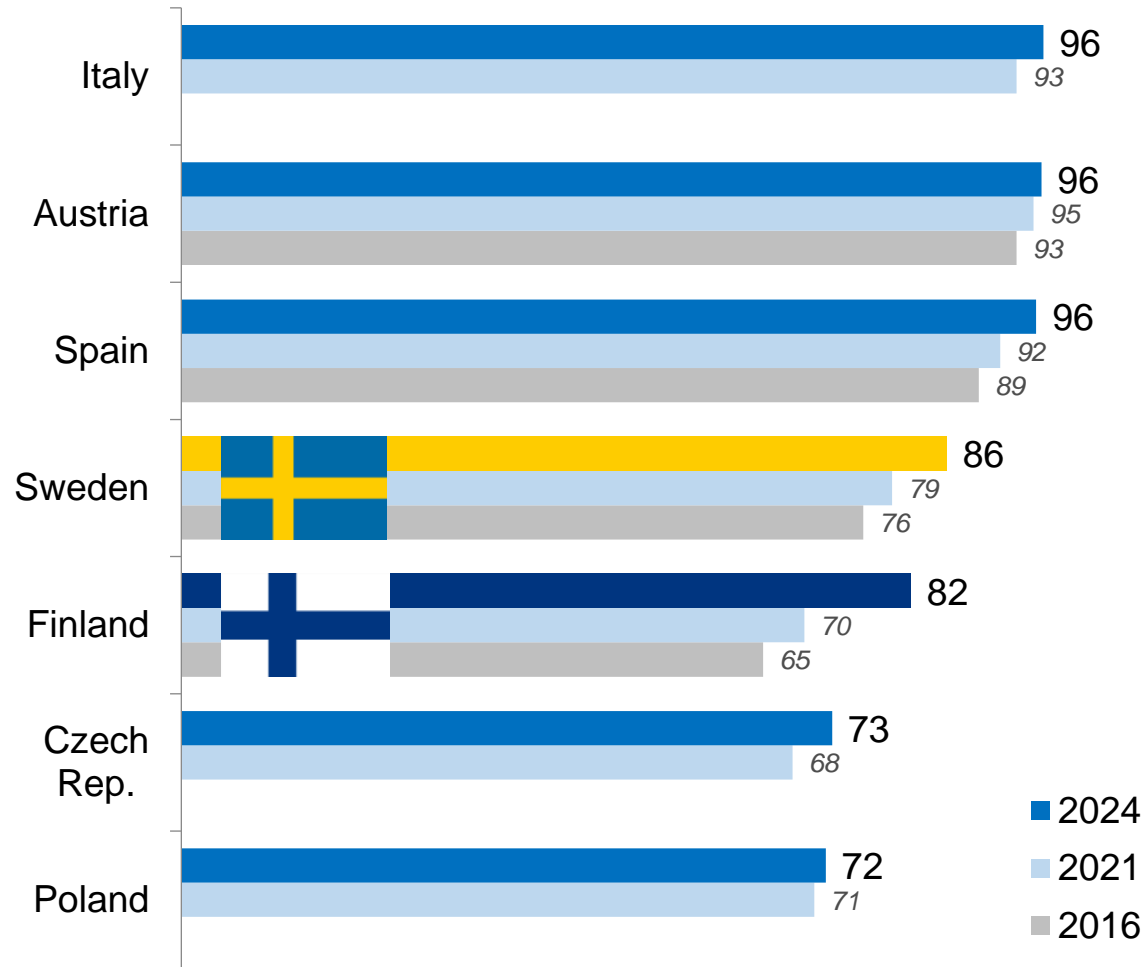
- » Here we can see in detail the overlapping of the potential guests for the three Scandinavian destinations.
- » The biggest group (a) is interested to travel to all three destinations (31%).
- » 13% of the potential travellers to Scandinavia are interested in Sweden and Norway (b).
- » 29% are interested in Sweden only (e) and 16% in Norway only (f)
- » 1-5% are interested in Finland only (g) or Finland with either Sweden (c) or Norway (d).

“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2024-2026) And which of these countries would you generally consider as a holiday destination in the next three years?”, Set of 46 destinations worldwide;
Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2024

2. Image of Finland as a holiday destination



Destination Image: Share of the German population with an image of the destination



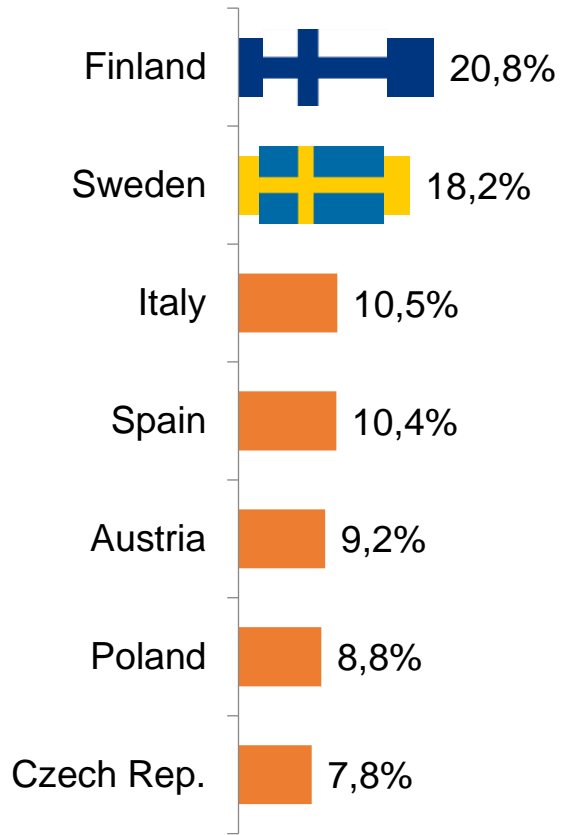
Out of 100 respondents ... % had an image of the destination*

- » The first important conclusion that we can draw from the image question is the share of Germans who are aware of the holiday destination in question, meaning that they have something in mind about that destination at all.
- » There are 82% of the Germans who have an image of Finland as a holiday destination. This is less compared with Sweden (86%)
- » But compared to 2021 and 2016, the awareness of Finland has grown significantly and the gap between Finland and Sweden has been closing.

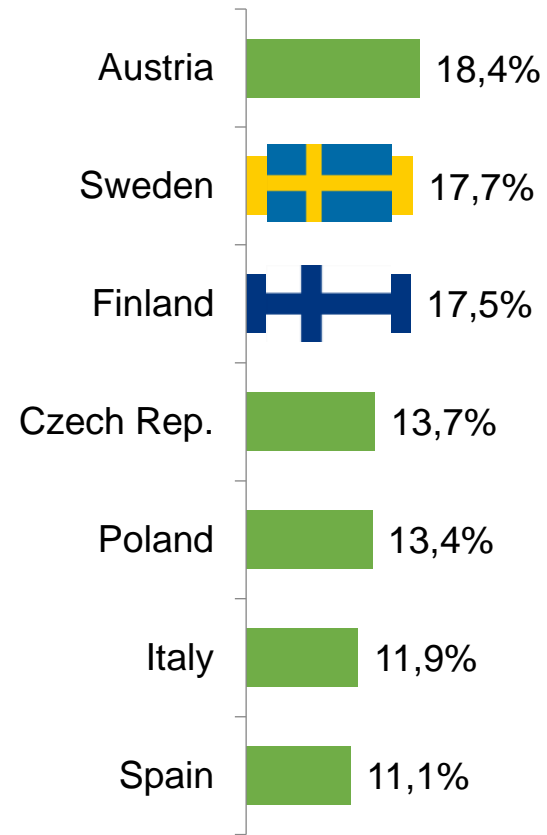
*Respondents, who did NOT approve to "I don't have an imagination about this destination". Question: "Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to ...?" Basis: German-speaking population 14+ years in Germany; Source: Reiseanalyse 2016, 2021 and 2024

Destination Image: Ranking of destinations abroad regarding the image criteria “unique” and “sustainable” destination

Unique



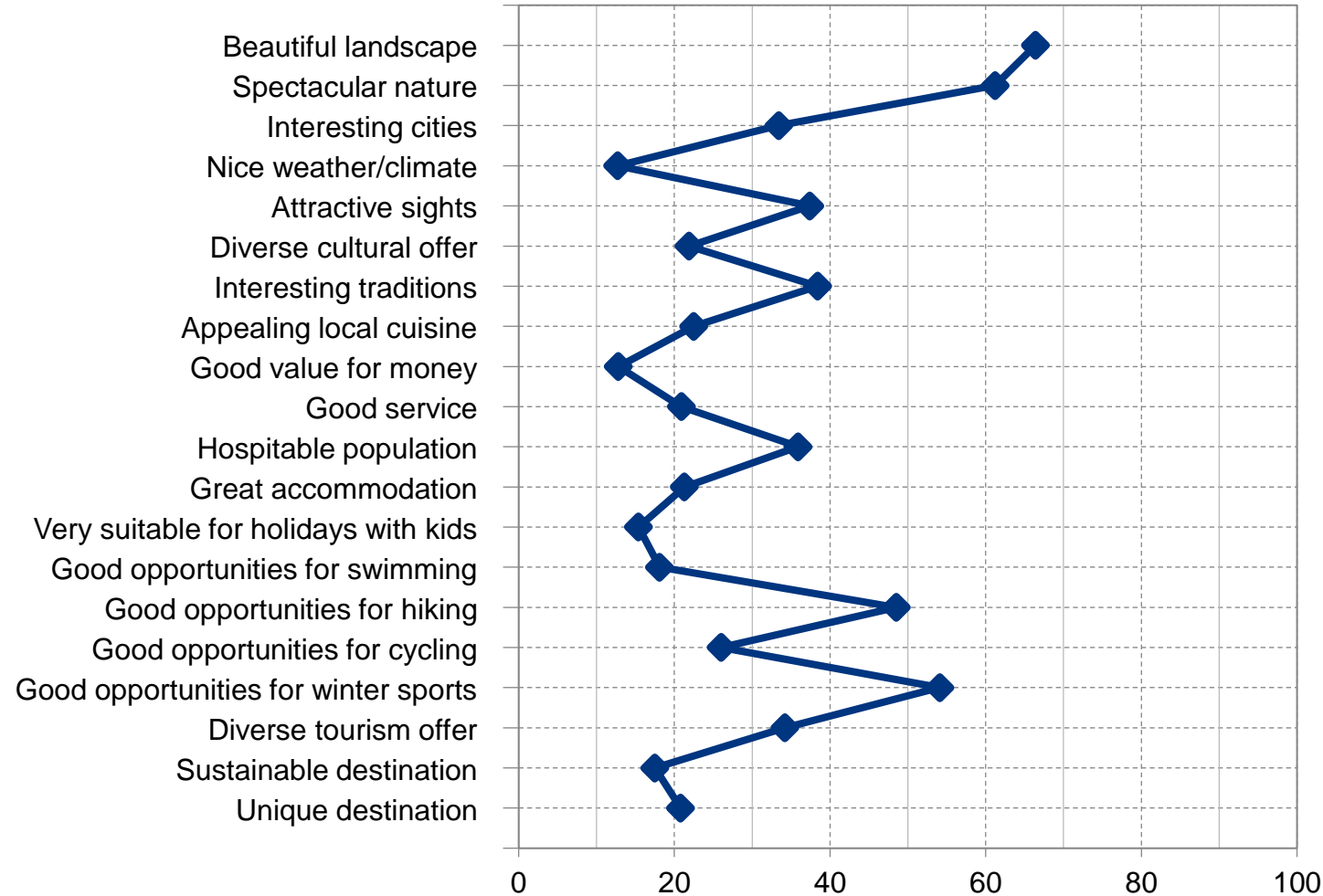
Sustainable



- » This figures show the ranking of the countries in the image question regarding the image aspects “unique” and “sustainable”.
- » Of all the countries in the questionnaire, Finland is perceived as the most unique holiday destination.
- » Finland is in third place as a sustainable holiday destination after Austria and Sweden, all three with very similar figures of around 18% of the population attributing sustainability as main image characteristic of the destination.

Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to ...?” Basis: German-speaking population 14+ years in Germany with an imagination of the respective destination; Source: Reiseanalyse 2024

Image of Finland: Destination profile Finland in the German population



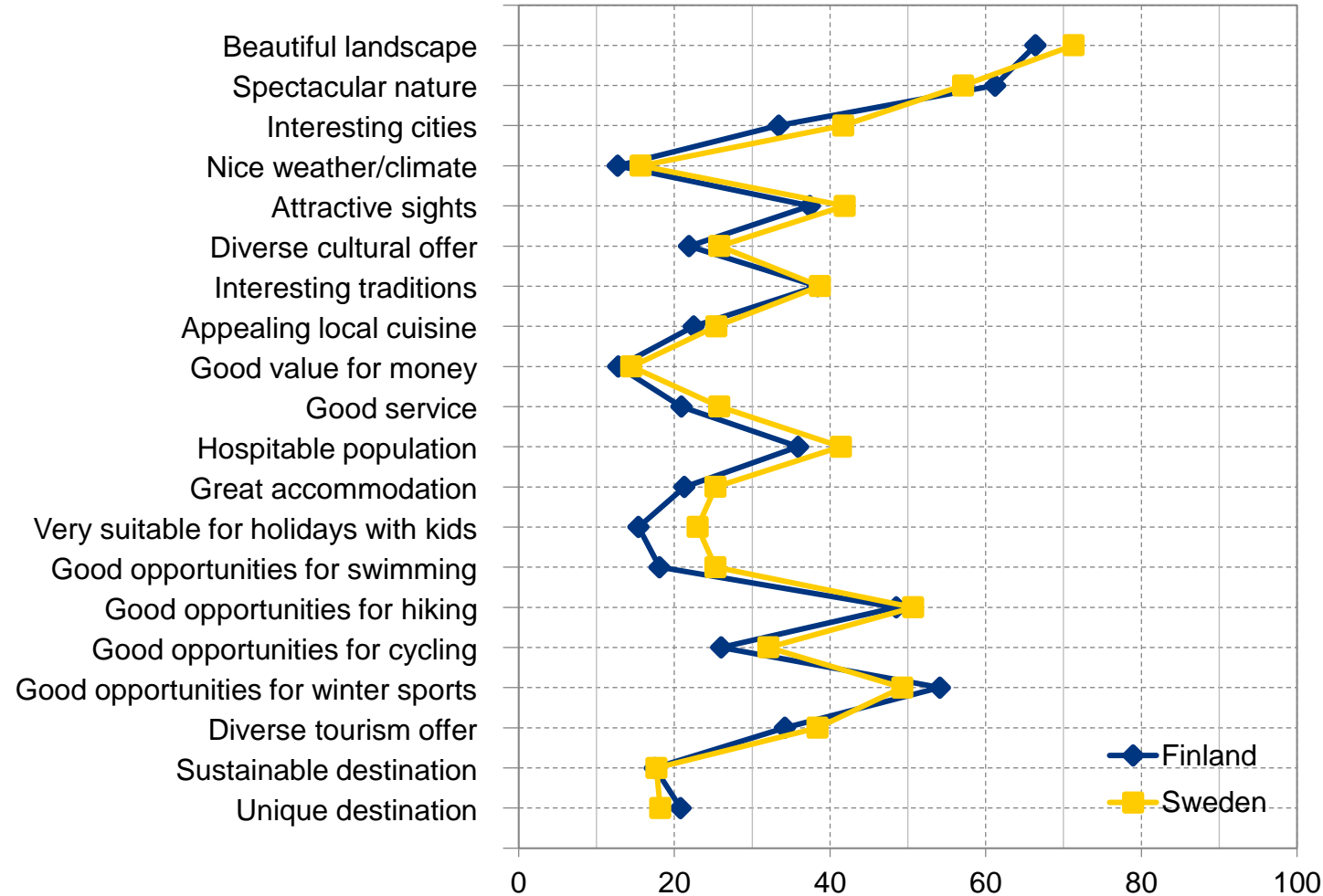
- » The most characteristic image items of Finland as a holiday destination are: Beautiful landscape (66%); Spectacular nature (61%); Good opportunities for winter sports (54%); Good hiking (49%); Interesting traditions (38%).
- » Least characteristic are: Nice weather/climate (13%); Good value for money (13%); Very suitable for holidays with kids (15%).

Question: "Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland?"

Basis: German-speaking population 14+ years in Germany with an imagination of Finland; in %

Source: Reiseanalyse 2024

Image of Finland: Comparison of the images of Finland and Sweden in the German population



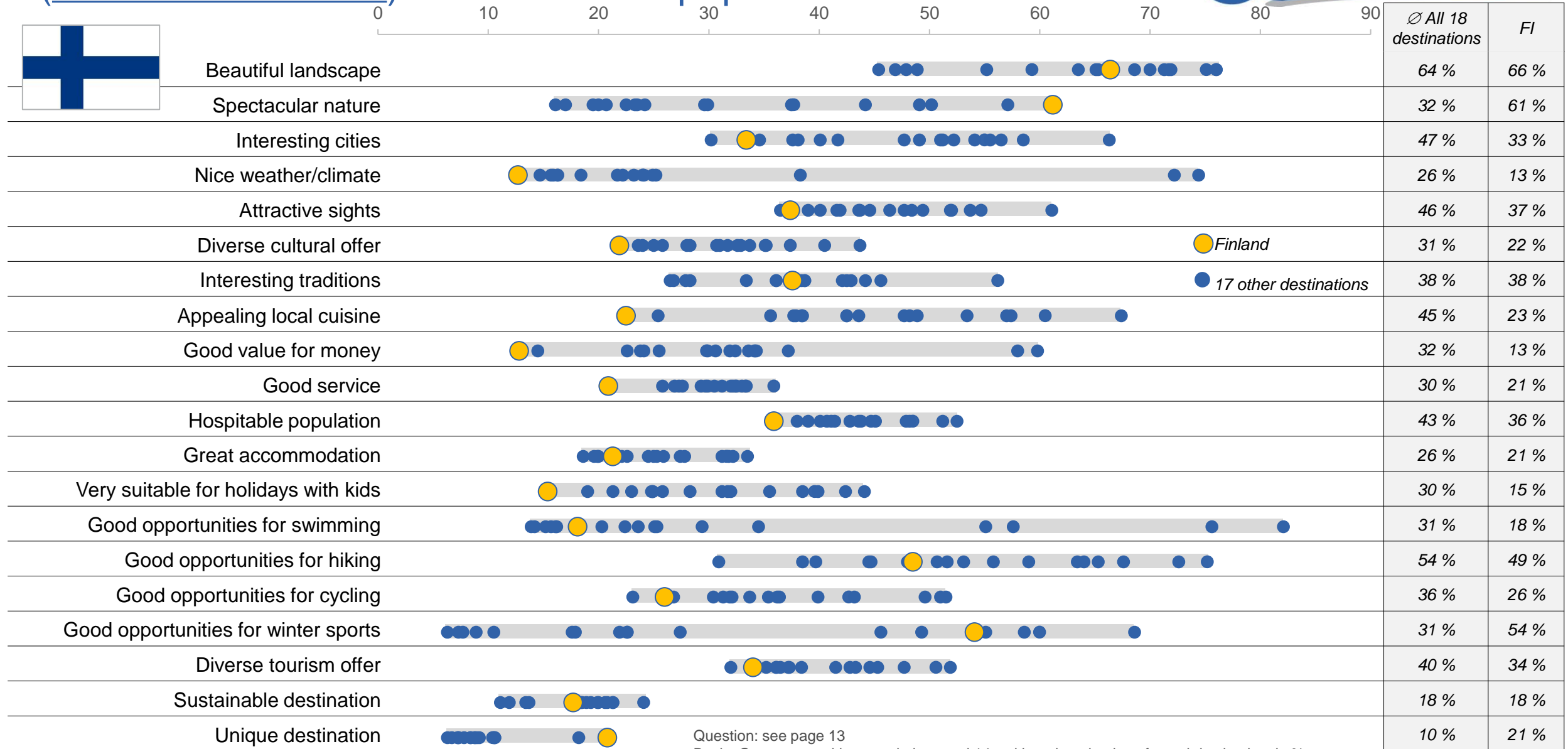
- » The holiday images of Finland and Sweden are very similar.
- » Finland is “leading” regarding the aspects of Spectacular nature, Unique destination, Good opportunities for winter sports.
- » Sweden is “leading” regarding all other aspects, most notably Suitability for family holidays, Interesting cities and Hiking opportunities.
- » This could be taken into account when deciding on which thematic segments Finland should focus on the German market in the future.

Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland/Sweden?”

Basis: German-speaking population 14+ years in Germany with an imagination of Finland/Sweden; in %

Source: Reiseanalyse 2024

Image of Finland: Images of Finland and other destinations (abroad & domestic) in the German population

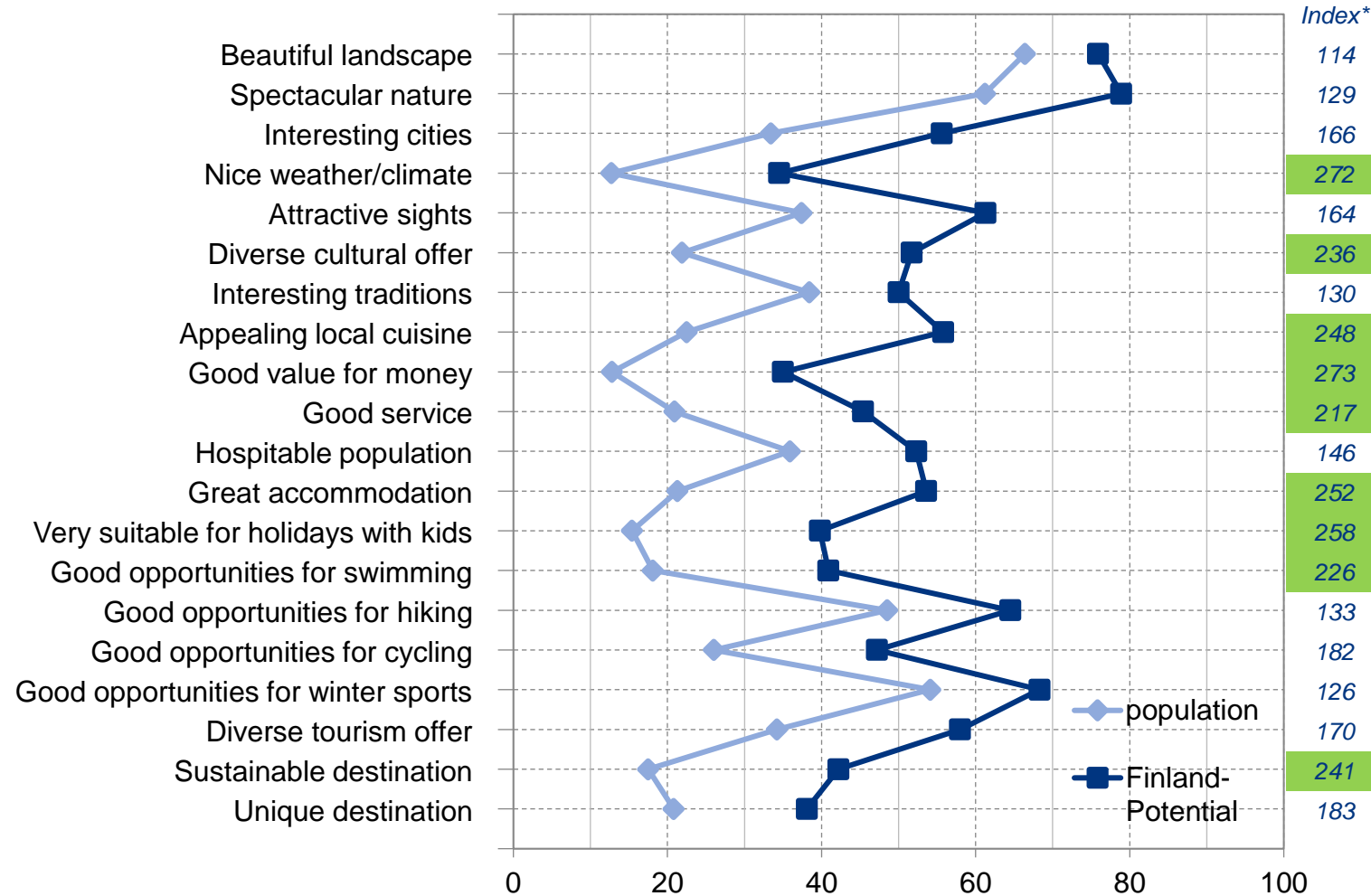


Question: see page 13

Basis: German-speaking population aged 14+ with an imagination of travel destination, in %

Source: Reiseanalyse 2024

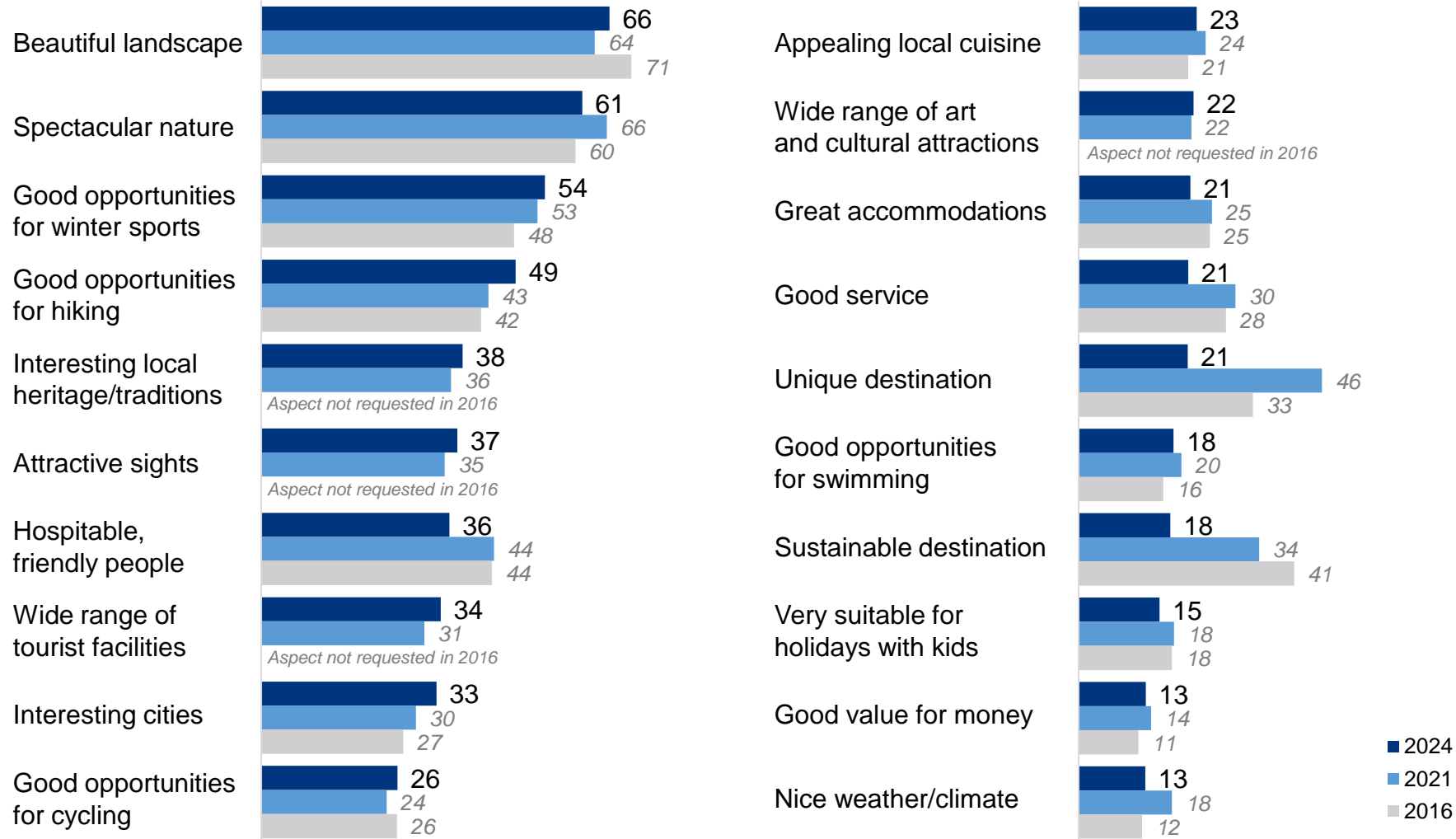
Image of Finland: Finland image of potential guests to Finland compared to the German population



- » Comparing the image profiles of the potential guests to Finland with all respondents, one can observe that the figures of the potential guests are much higher than in the population – the index measures how much higher in relative terms.
- » The aspects marked in green are sticking out. Here the image is much stronger with the Finland-Potential than with the population. This could be a sign for “unknown strength” of Finland as a holiday destination, that might be considered to be pushed by marketing.

Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland?” * Index = relative comparison of the figures of the Finland-Potential and the population
 Basis: German-speaking population 14+ years in Germany with an imagination of Finland; with an imagination and interest to visit Finland; in %
 Source: Reiseanalyse 2024

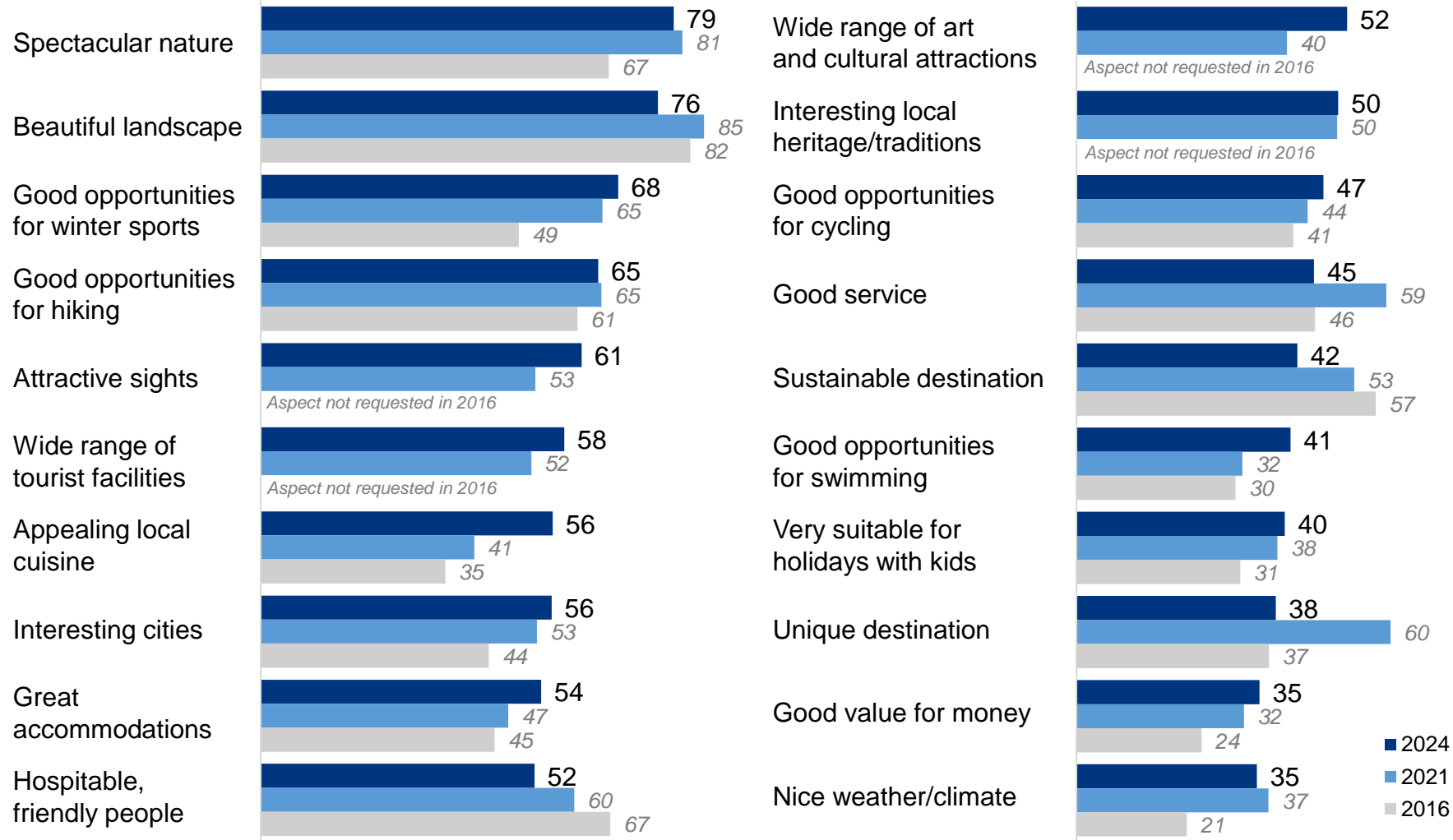
Image of Finland: Changes 2016 → 2021 → 2024 in the German population with an imagination of Finland



- » This figure shows how the image aspects have changed over the years from 2016 to 2024 with the German population.
- » Since 2016, the aspects "Beautiful Landscape" and "Spectacular nature" have been the top two characteristics that apply to Finland.
- » Some of the characteristic items have decreased in the recent years. In particular "Unique destination", "sustainable destination" and "hospitable, friendly people".

Question: "Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland?" Basis: German-speaking population 14+ years in Germany with an imagination of Finland. Source: Reiseanalyse 2016, 2021 and 2024

Image of Finland: Changes 2016 → 2021 → 2024 with the potential guests of Finland



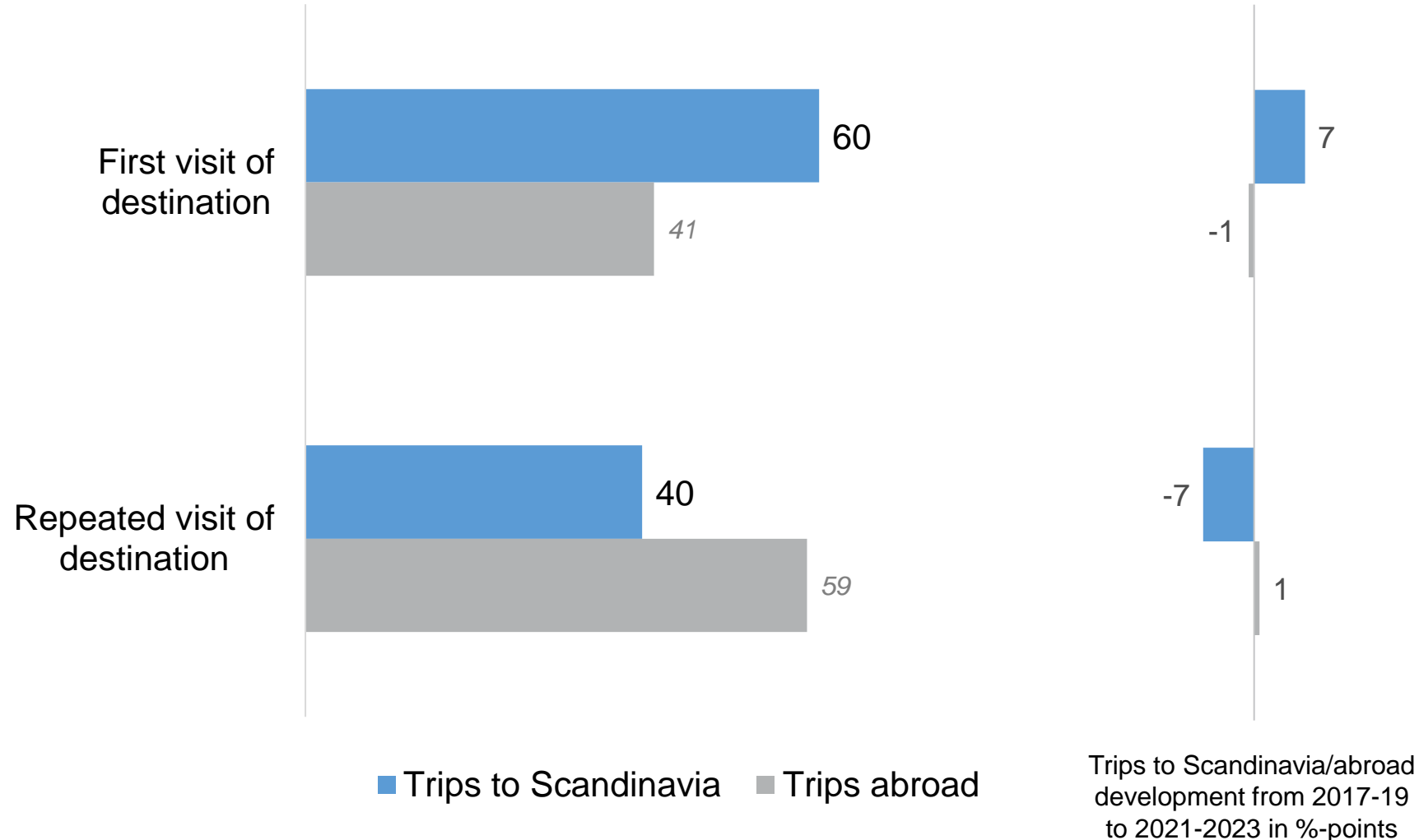
- » This figure shows how the image aspects have changed over the years from 2016 to 2024 with potential guests of Finland.
- » Compared to 2016, it is noticeable that there has been an increase in the majority of all aspects.
- » Only the aspects “beautiful landscape”, “hospitable, friendly people” and “sustainable destination” experienced a decline.
- » It is interesting to note that the aspects “good service” and “unique destination” achieved a significantly higher value in 2021 than in 2016 and 2024.

Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to Finland?” Basis: German-speaking population 14+ years in Germany with an imagination and interest of travelling to Finland. Source: Reiseanalyse 2016, 2021 and 2024

A young boy with light hair, wearing a dark green shirt and blue jeans, is sitting on a wooden bench. He is looking out over a calm lake towards a sunset. The sun is low on the horizon, creating a bright orange glow that reflects on the water. The sky is a mix of blue and orange, with some clouds. In the background, there is a dense forest of evergreen trees. The overall scene is peaceful and scenic.

3. Holiday trips to Scandinavia: Travel behaviour

Holiday trips 5+ days to Scandinavia: First time at destination? 60% newcomers, 40% repeating guests

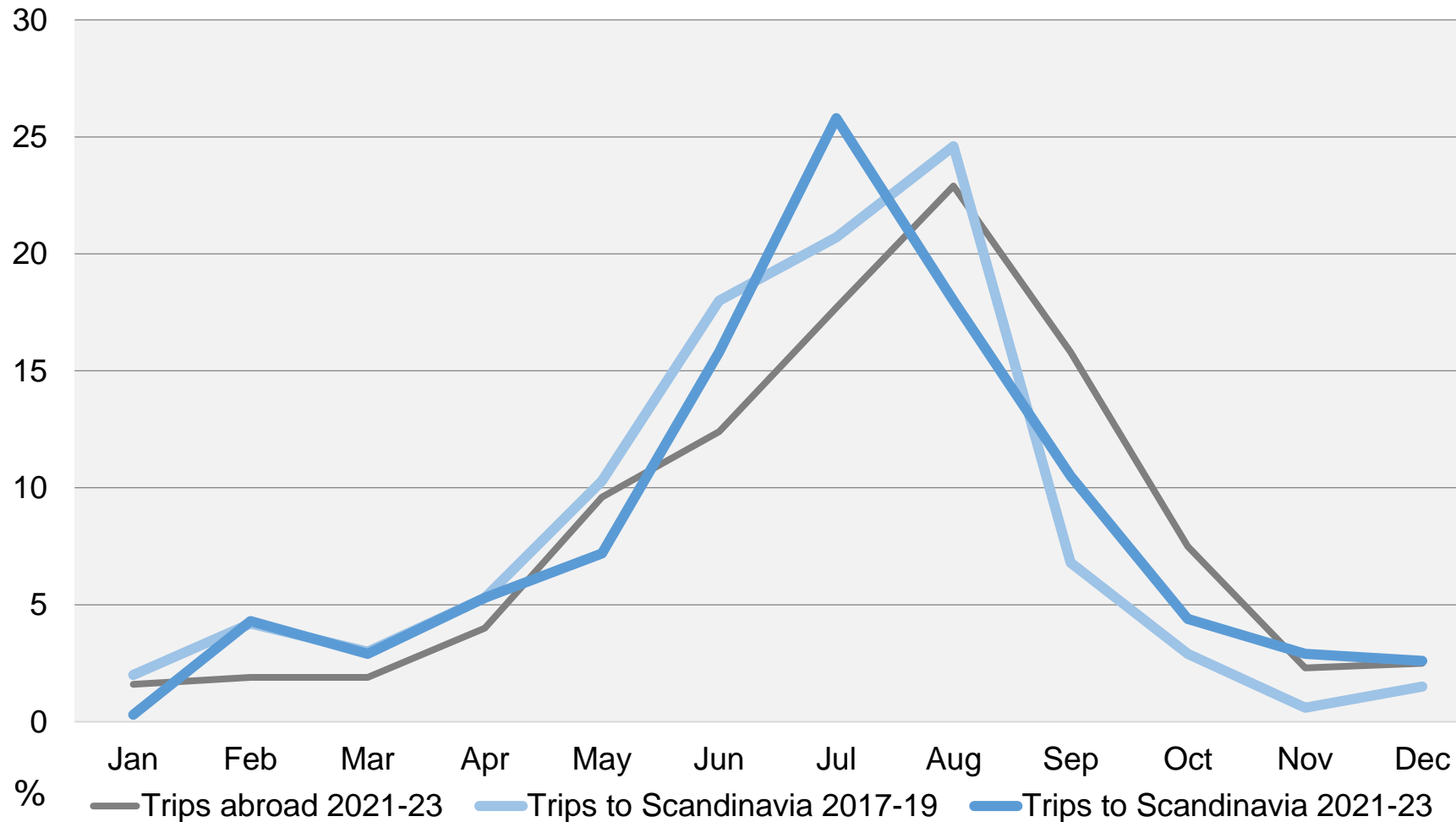


- » 60% of all holiday trips to Scandinavia are first time visits to the destination.
- » This share is much higher than with all holiday trips abroad (41%).
- » It has increased by 7%-points during the last years.
- » This is an important information for tourism marketers as it shows the important of addressing the new guests with relevant information about the destination.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Month of departure

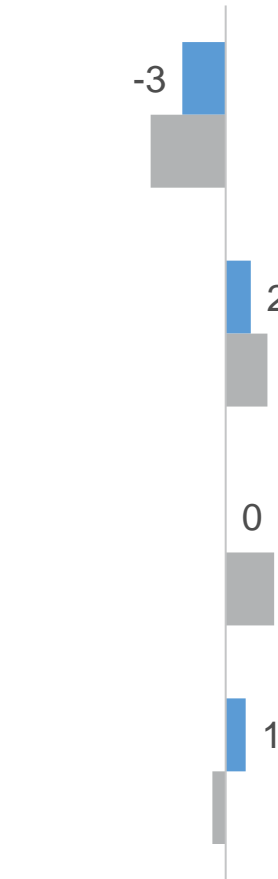
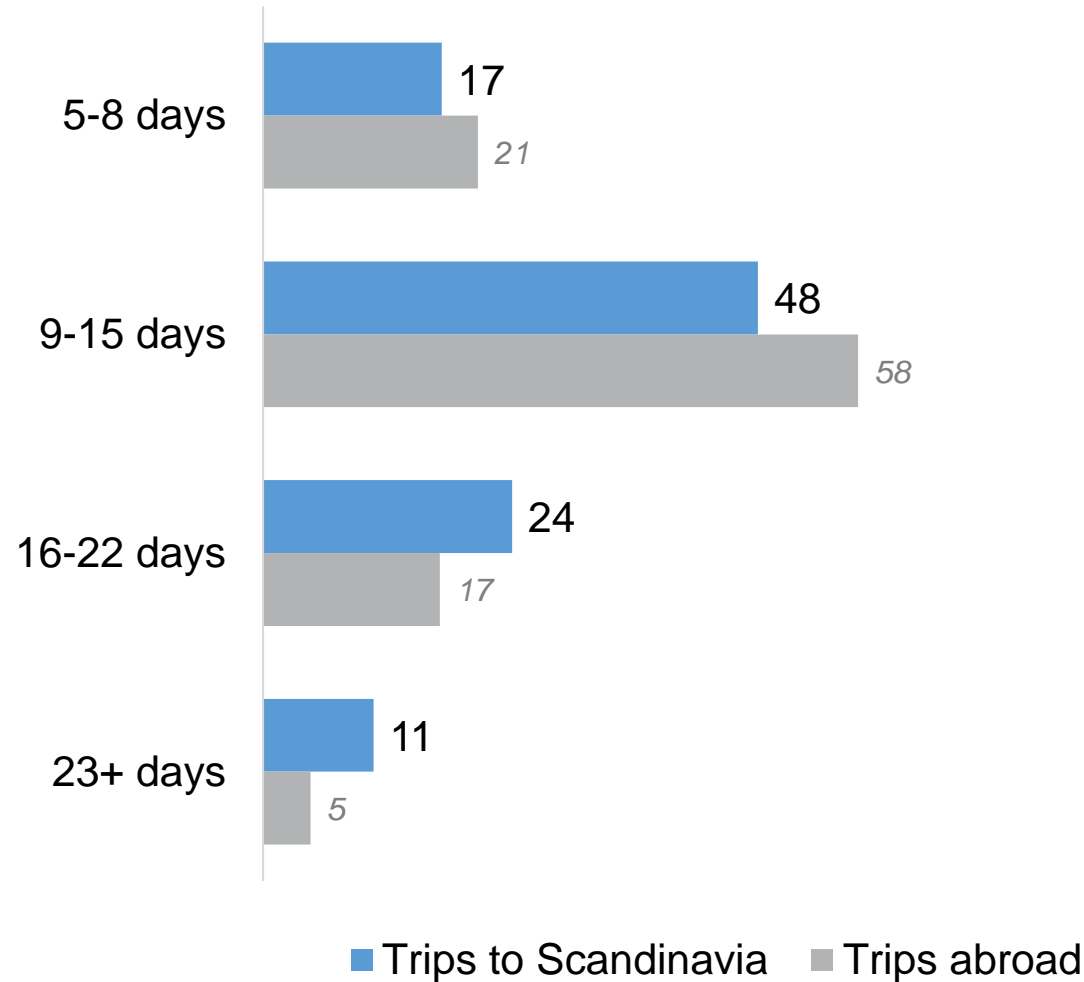
Most trips during summer; comparatively high seasonality



- » Holiday trips to Scandinavia are very concentrated in a brief summer season: 26% of all holiday trips to Scandinavia start in July, 18% in August; 16% start in June, 11% in September.
- » Each other month has a share equal to or below 7%.
- » The seasonality of all holiday trips abroad also peaks in August, but the summer is less dominant over the other seasons.

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 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Duration – On average a holiday trip to Scandinavia lasts more than 14 days



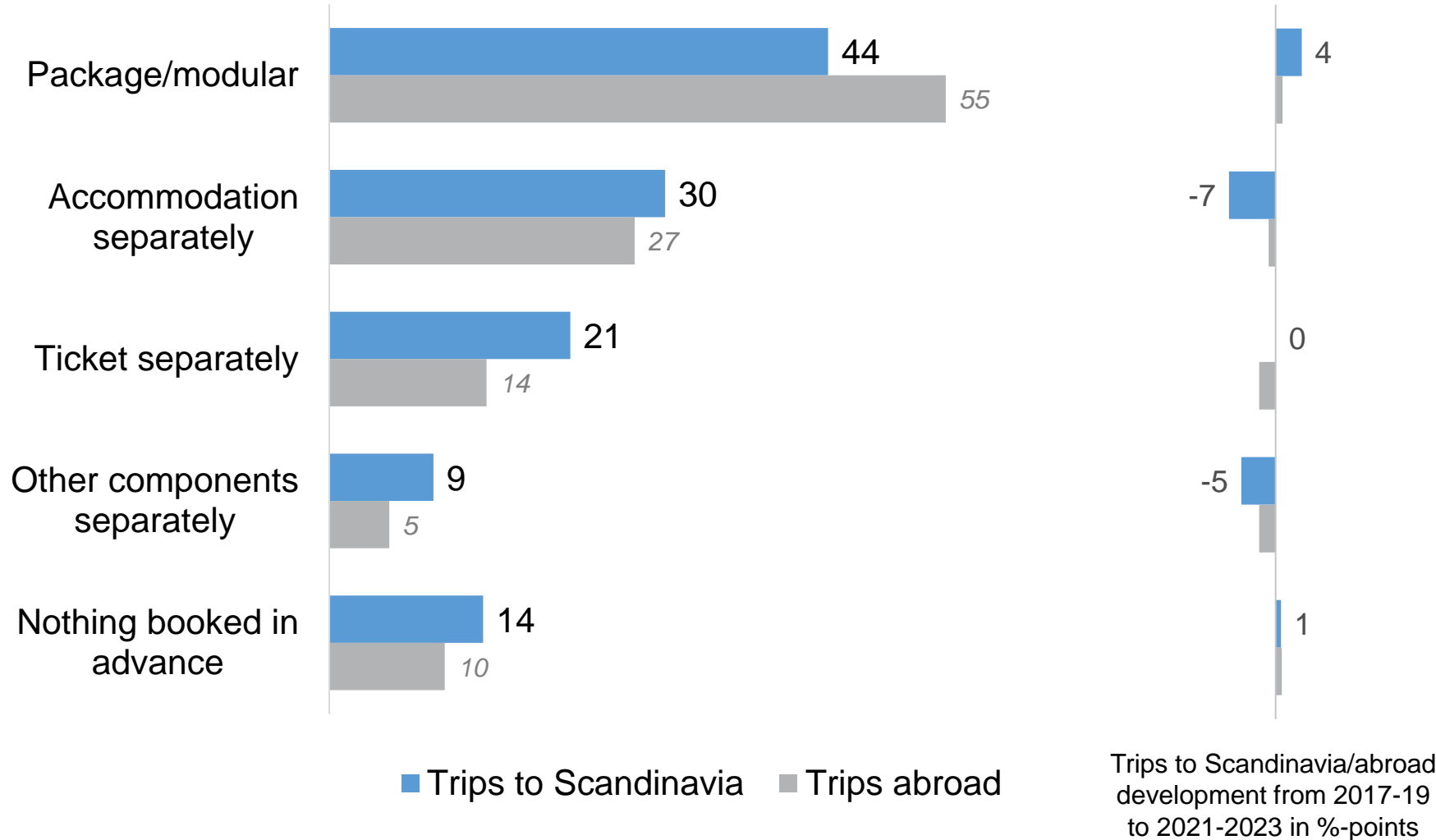
Trips to Scandinavia/abroad development from 2017-19 to 2021-2023 in %-points

- » The majority of holiday trips to Scandinavia last two weeks (48%). This is 10%-pt. less than for all holiday trips abroad (58%).
- » 17% of all holiday trips to Scandinavia last around one week, 35% last longer than two weeks.
- » In recent years, the number of holidays to Scandinavia lasting only around one week has decreased.
- » The average duration of holiday trips to Scandinavia is 15.5 days, an increase of 0.6 days in the last years.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Organisation/Booking

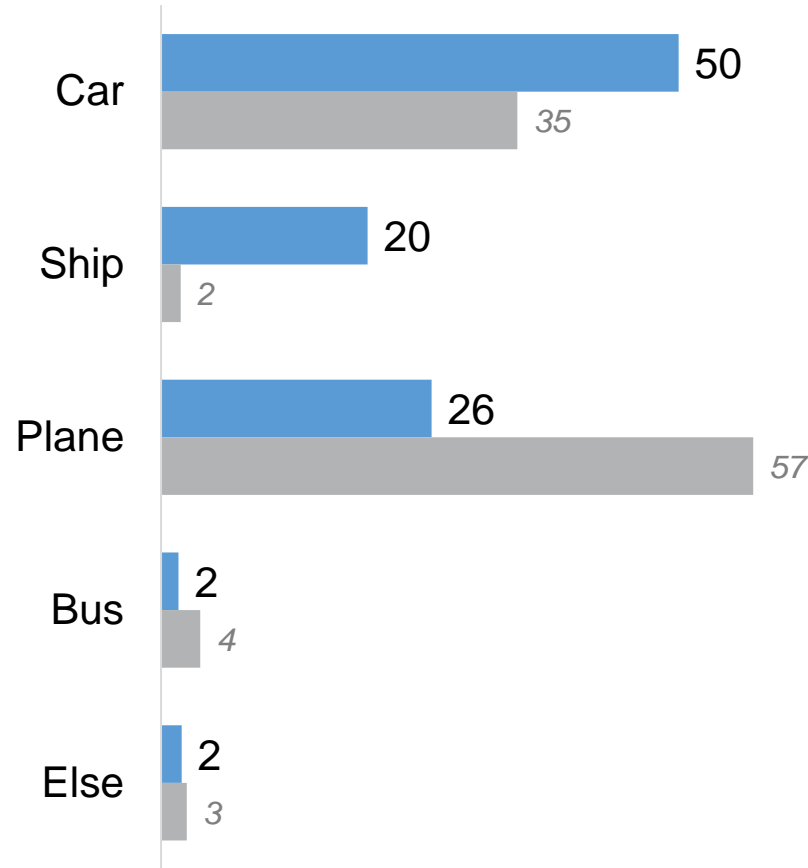
In front are package and separate accommodation bookings



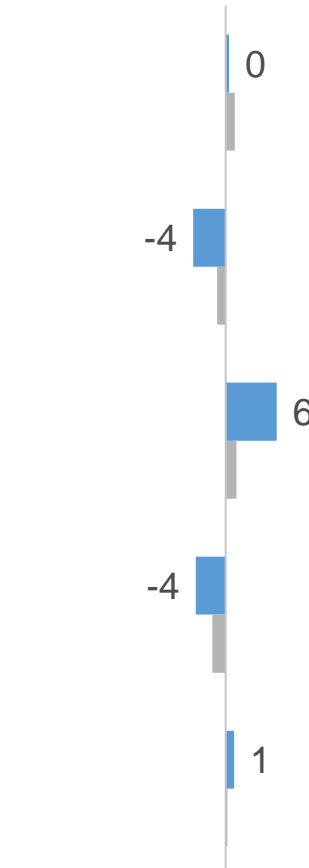
- » 44% of all holiday trips to Scandinavia were organised as package tours, followed by 30% of the trips with separate accommodation bookings.
- » With 14% the share of “nothing booked in advance” is quite high, probably due to the high share of the camping segment.
- » Compared to all trips abroad the share of package holidays is lower, the share of individual bookings higher.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Means of transport the car is most important, relevance of the ship is striking



■ Trips to Scandinavia ■ Trips abroad



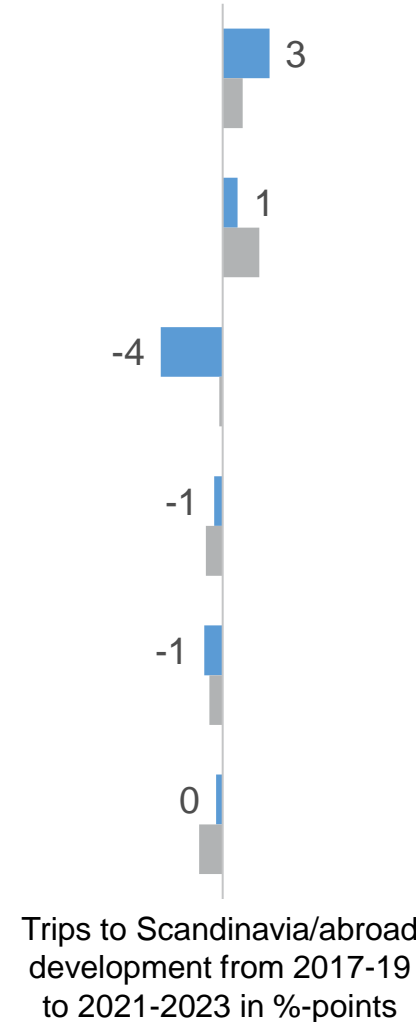
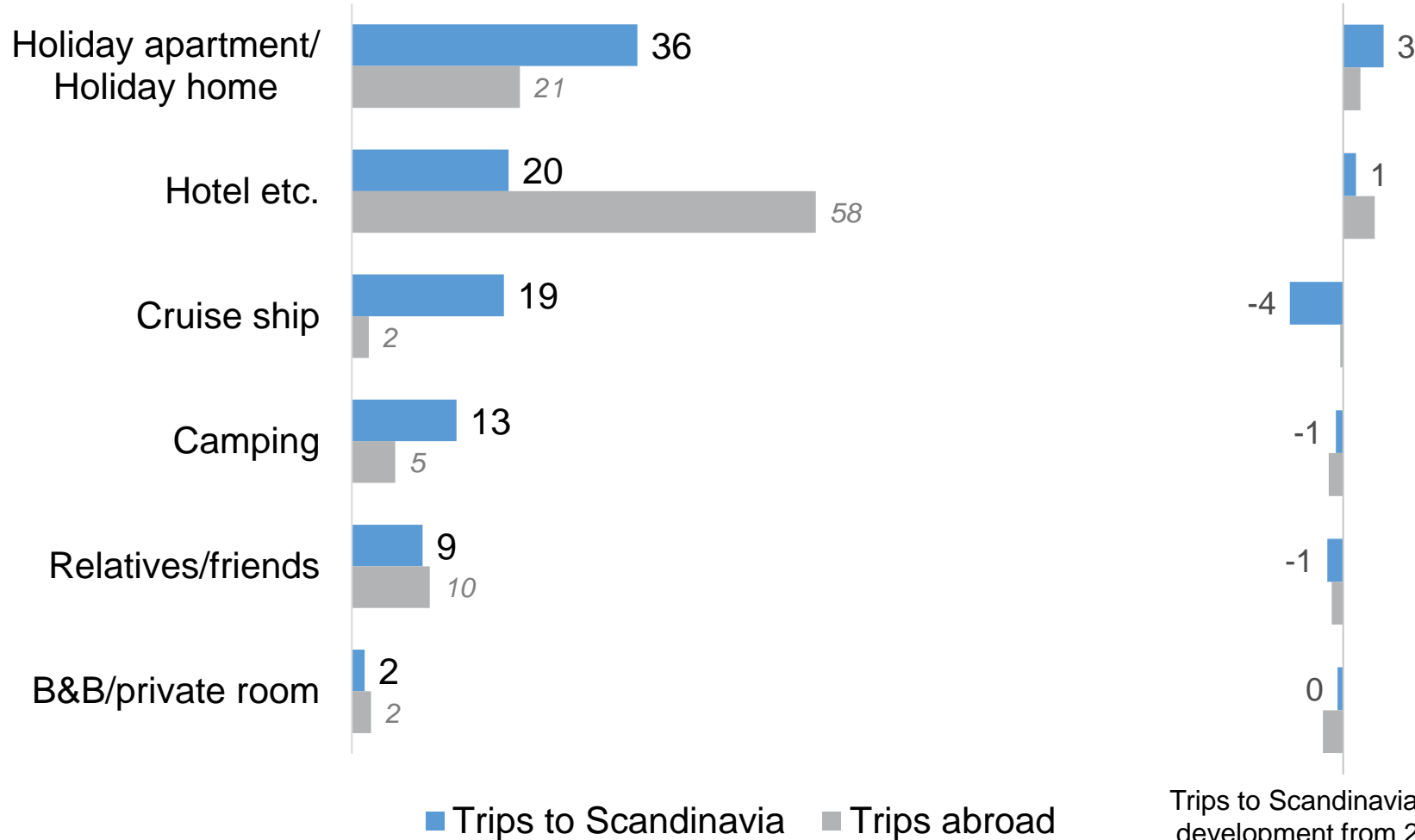
Trips to Scandinavia/abroad development from 2017-19 to 2021-2023 in %-points

- » 50% of all holiday trips to Scandinavia were made by car/caravanning, 20% by ship and 26% by plane.
- » Compared to all holiday trips abroad the significance of the ship as a means of transport is really striking.
- » The trends of the last years show an increase of plane travel and a decrease for travel by ship and bus.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
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Holiday trips 5+ days to Scandinavia: Accommodation

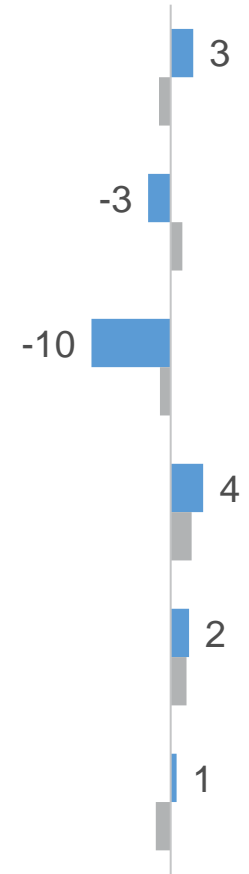
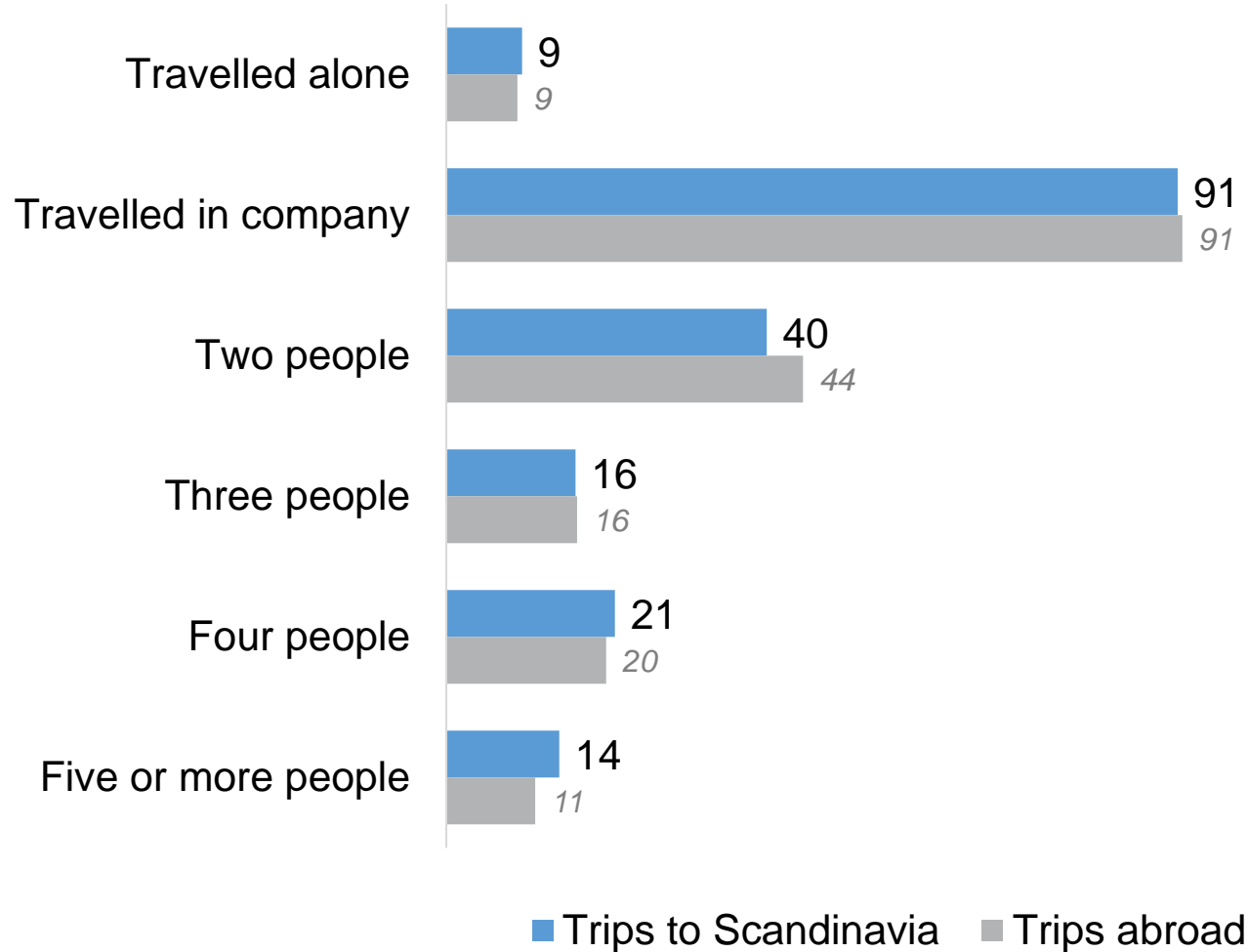
Holiday apartment/home in front of cruise ship and hotel



- » The holiday home/apartment is the most important accommodation, accounting for 36% of all holiday trips to Scandinavia.
- » Hotels, by far the dominating form of accommodation of all holiday trips abroad only play a smaller role in Scandinavia (20% of all trips there).
- » Cruise with 19% and Camping with 13% follow.
- » The last years have seen increases of the holiday homes and decreases for cruise.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Number of people travelling – Almost always in company, most often couples

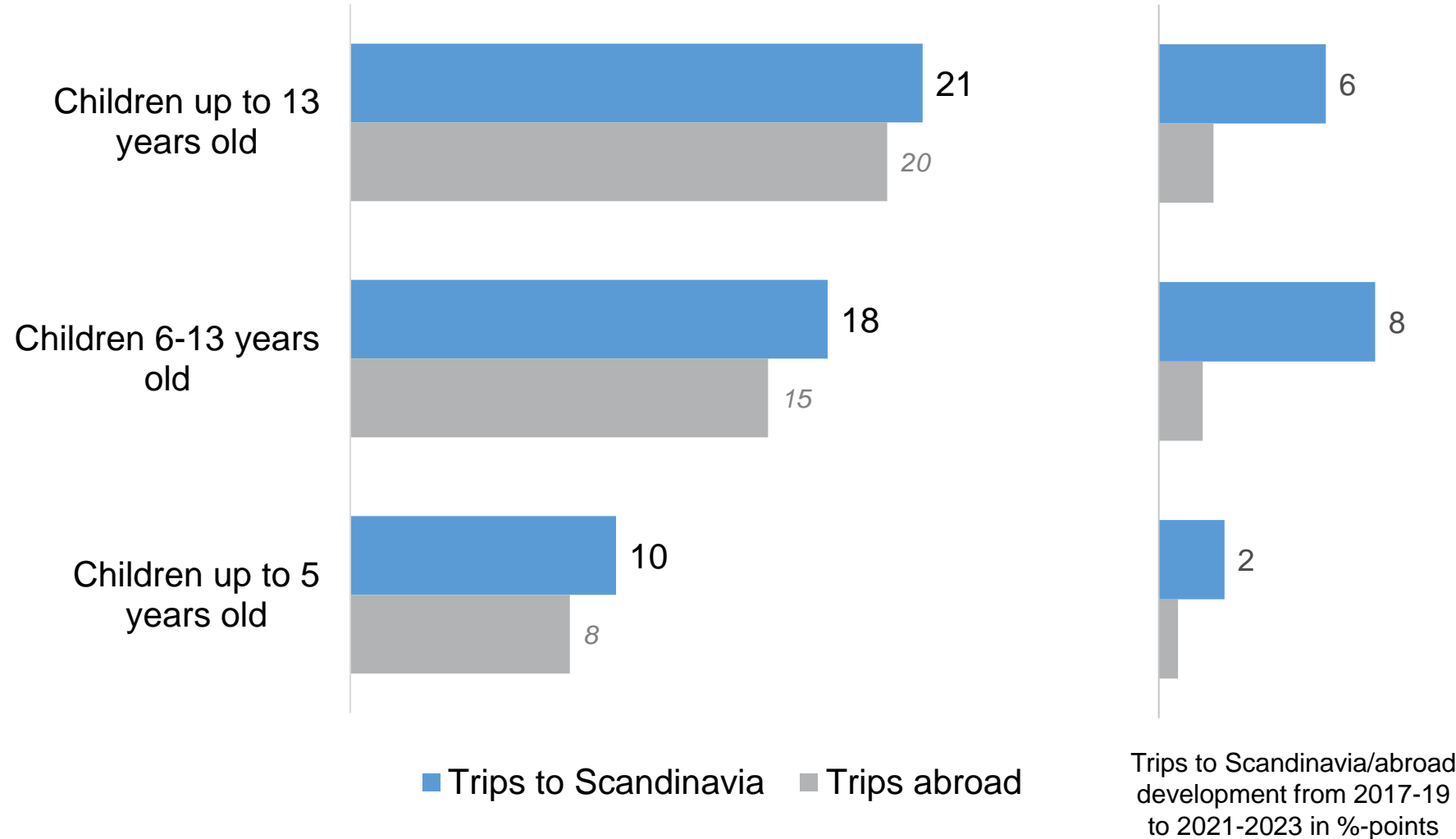


Trips to Scandinavia/abroad development from 2017-19 to 2021-2023 in %-points

- » On the vast majority of holiday trips to Scandinavia people are travelling in company.
- » Compared to all holiday trips abroad, the average party size travelling to Scandinavia is slightly larger (3.2 persons vs. 3.0).
- » During the last years, the shares of party sizes of two people decreased, party sizes of three and four people have increased.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

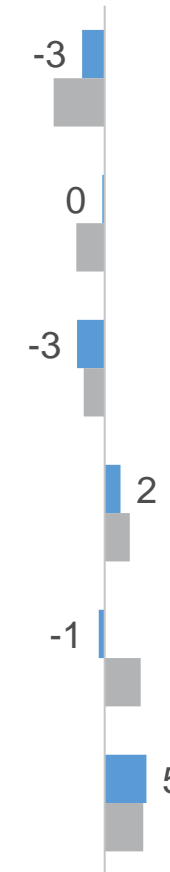
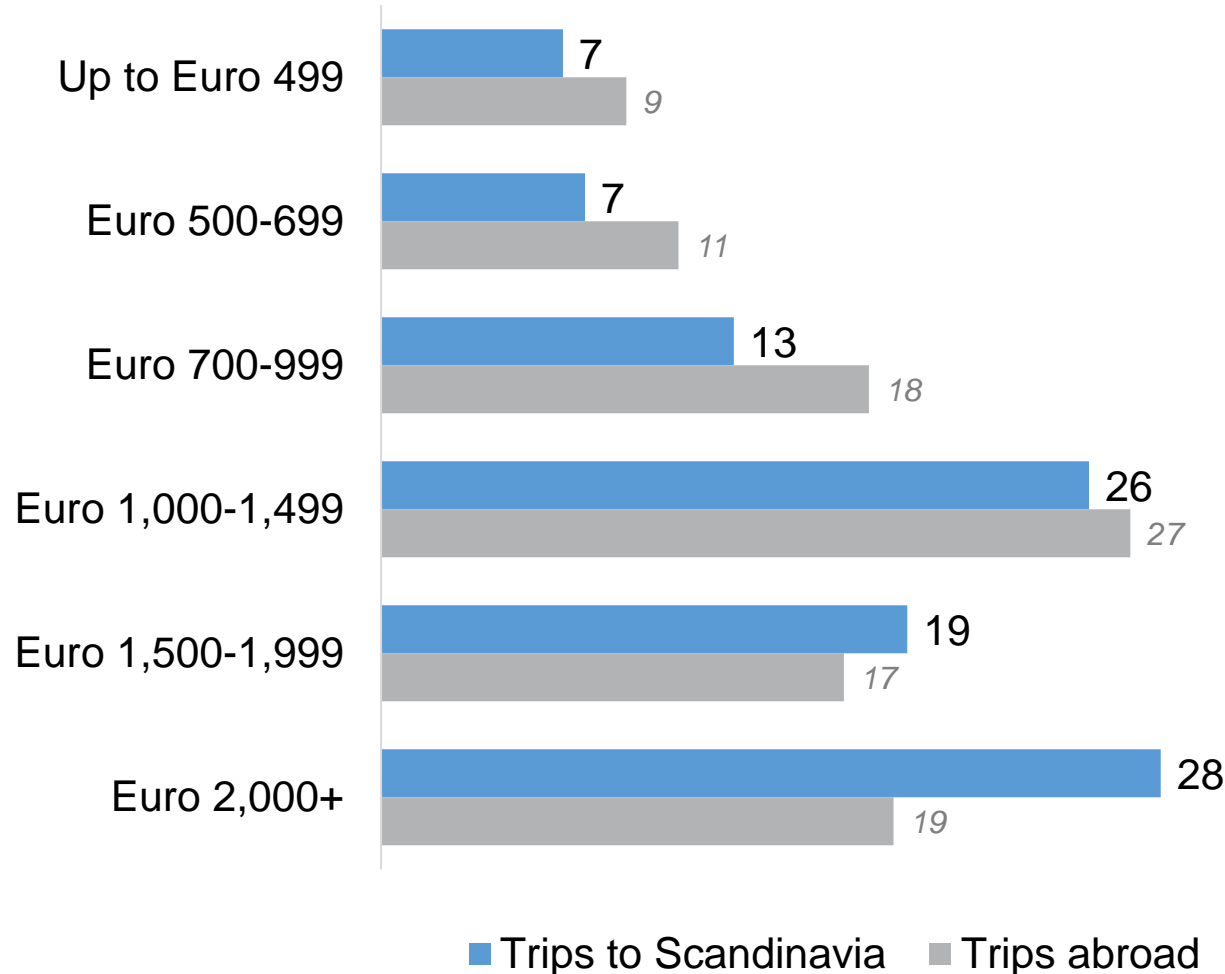
Holiday trips 5+ days to Scandinavia: Children en-route 21% of all trips with children up to 13 years old



- » On 21% of all holiday trips to Scandinavia people travelled with children up to 13 years; 18% with 6-13 years old and 10% with children up to 5 years old.
- » This is more than with all holiday trips abroad.
- » All values have risen by 2-8%-points compared to the last few years.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Travel expenditure* per person and trip. Dominance of quite high expenditure



Trips to Scandinavia/abroad development from 2017-19 to 2021-2023 in %-points

- » 73% of all holiday trips to Scandinavia have a holiday spending of more than 1,000 EUR per trip and person (total expenditure including transport and all spending at destination).
- » Expenditure for holiday trips to Scandinavia increased by 45% in the last years (2021 to 2024) from an average 1,260 EUR to 1,833 EUR.
- » In the same time expenditure for all holiday trips abroad increased by 50% from 892 EUR to 1,337 EUR.

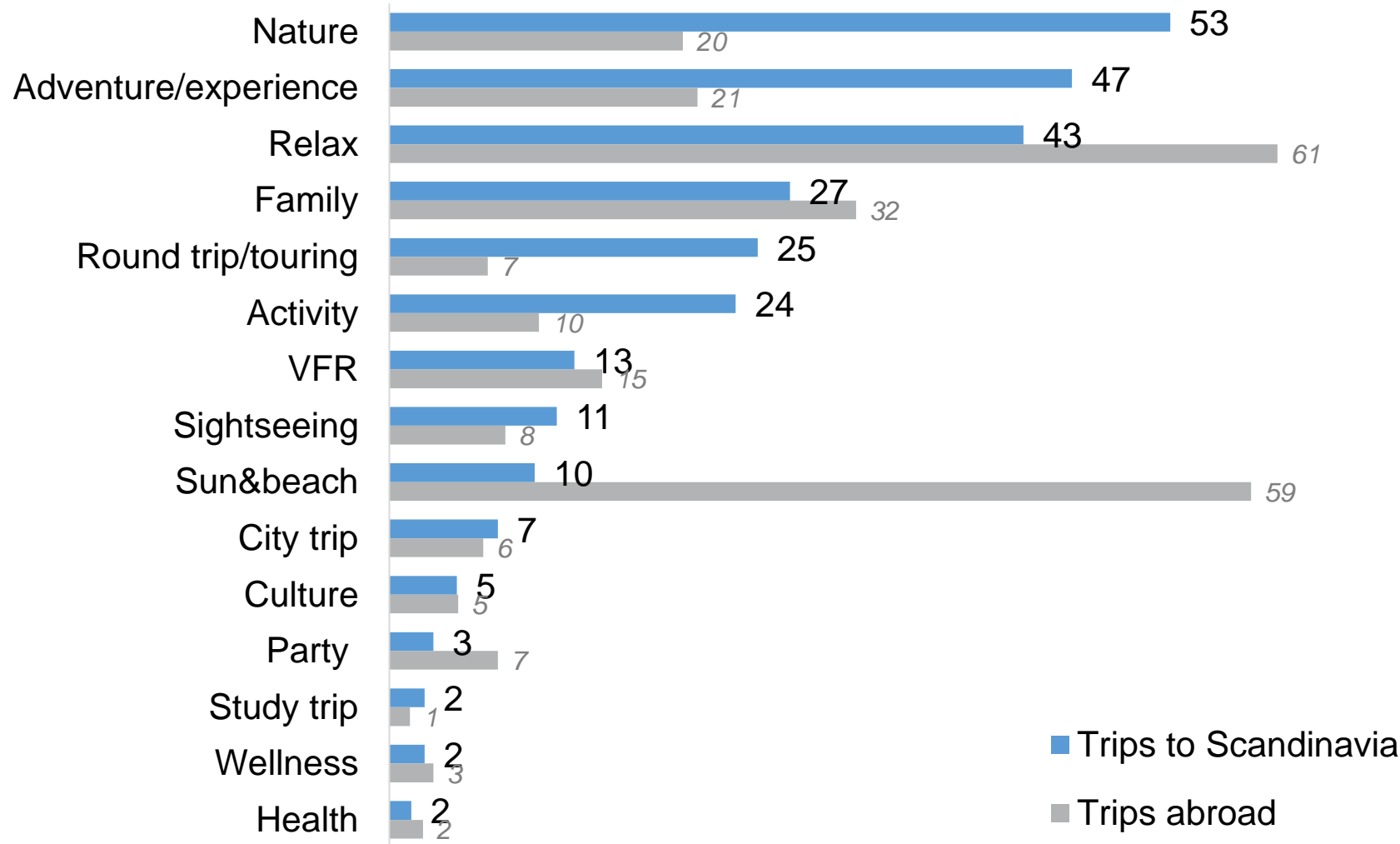
* „total“ travel expenditure: Transport, accommodation, food & beverages, associated cost

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %

Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Type of trips

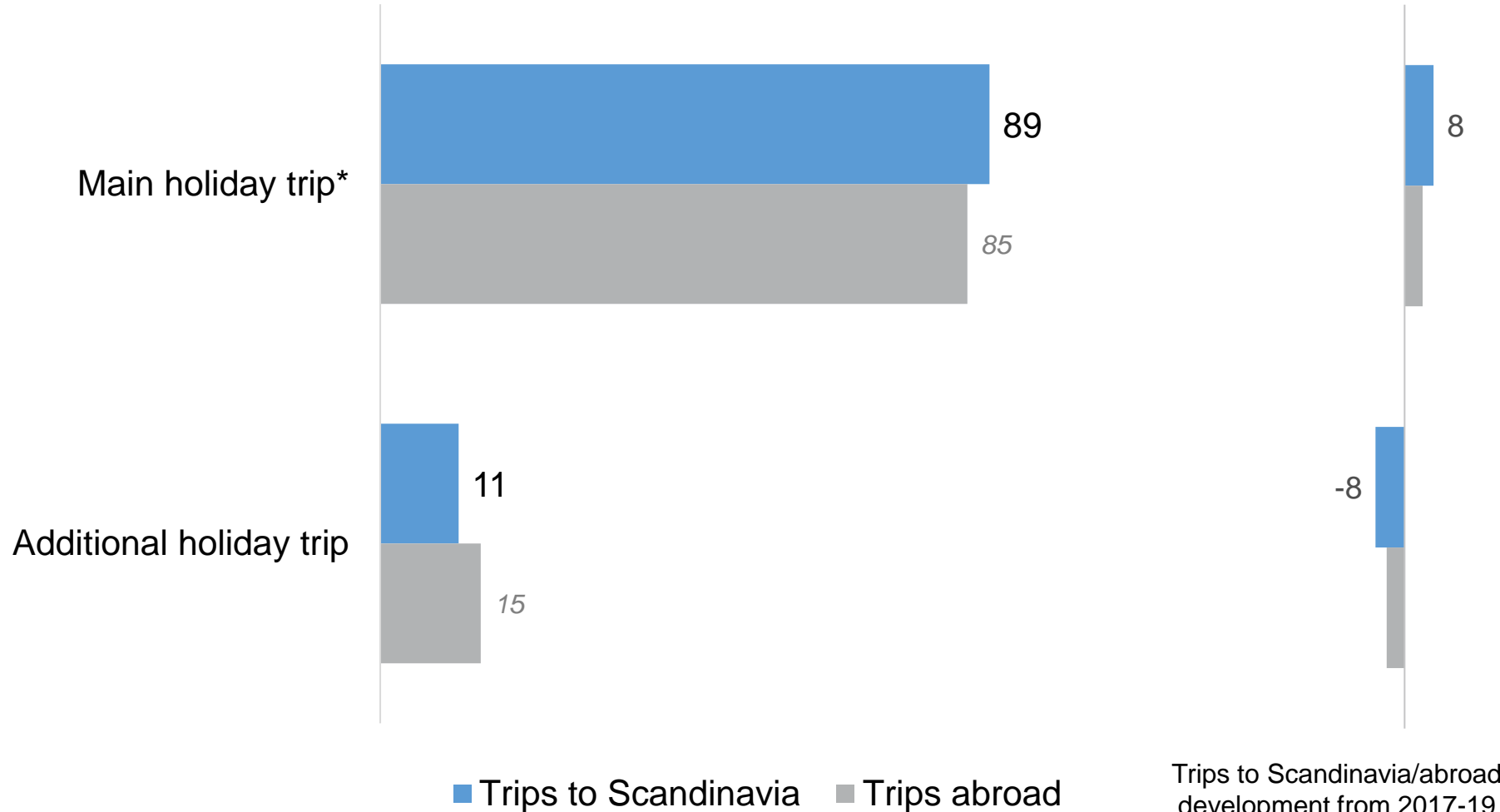
Nature, experience, and relaxing



- » Most important is nature holiday with a share of than 53% of all holiday trips to Scandinavia.
- » It is followed by adventure/experience holidays (German: “Erlebnisurlaub”) (47%) relax (43%) and, at a slight distance, family holidays (27%), touring (25%) and activity holidays (24%).
- » Nature, “Erlebnis”, touring and activity holidays are much more important for Scandinavia than for all trips abroad.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

Holiday trips 5+ days to Scandinavia: Importance of trip 89% are main holidays*



- » The vast majority of holiday trips to Scandinavia are main holidays.
- » The main holiday is the only or the most important holiday trip (5+ days) in one calendar year.
- » There are only minor differences between holiday trips to Scandinavia and all holiday trips abroad regarding the importance of trip.

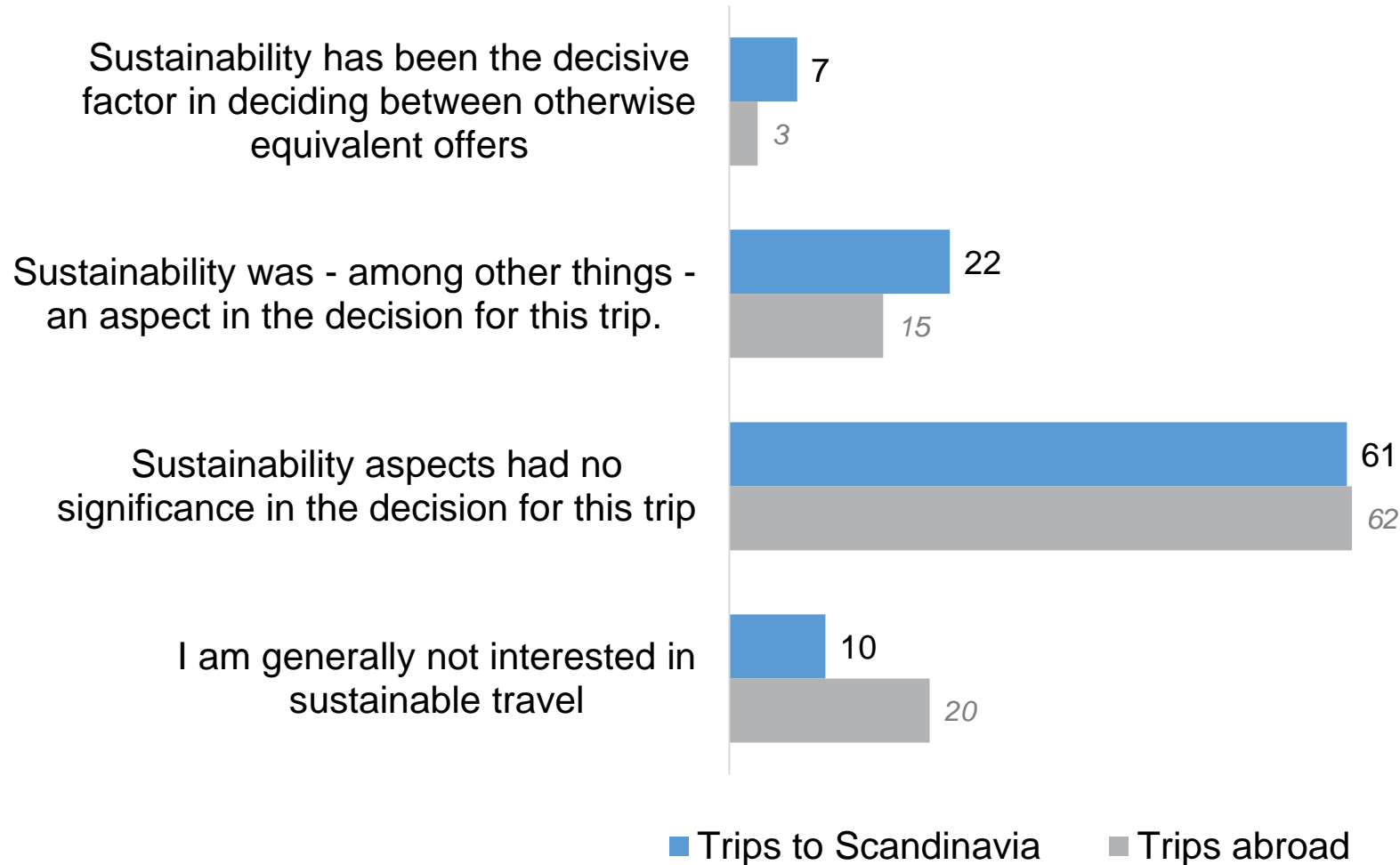
Trips to Scandinavia/abroad development from 2017-19 to 2021-2023 in %-points

* 'main holiday trip' = only or most important holiday trip (5+ days) in one year, as expressed by the respondent.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %

Basis: Holiday trips (5+ days) of German/German speaking population 2018-2020/2021-2023; Source: Reiseanalyse 2018-2024

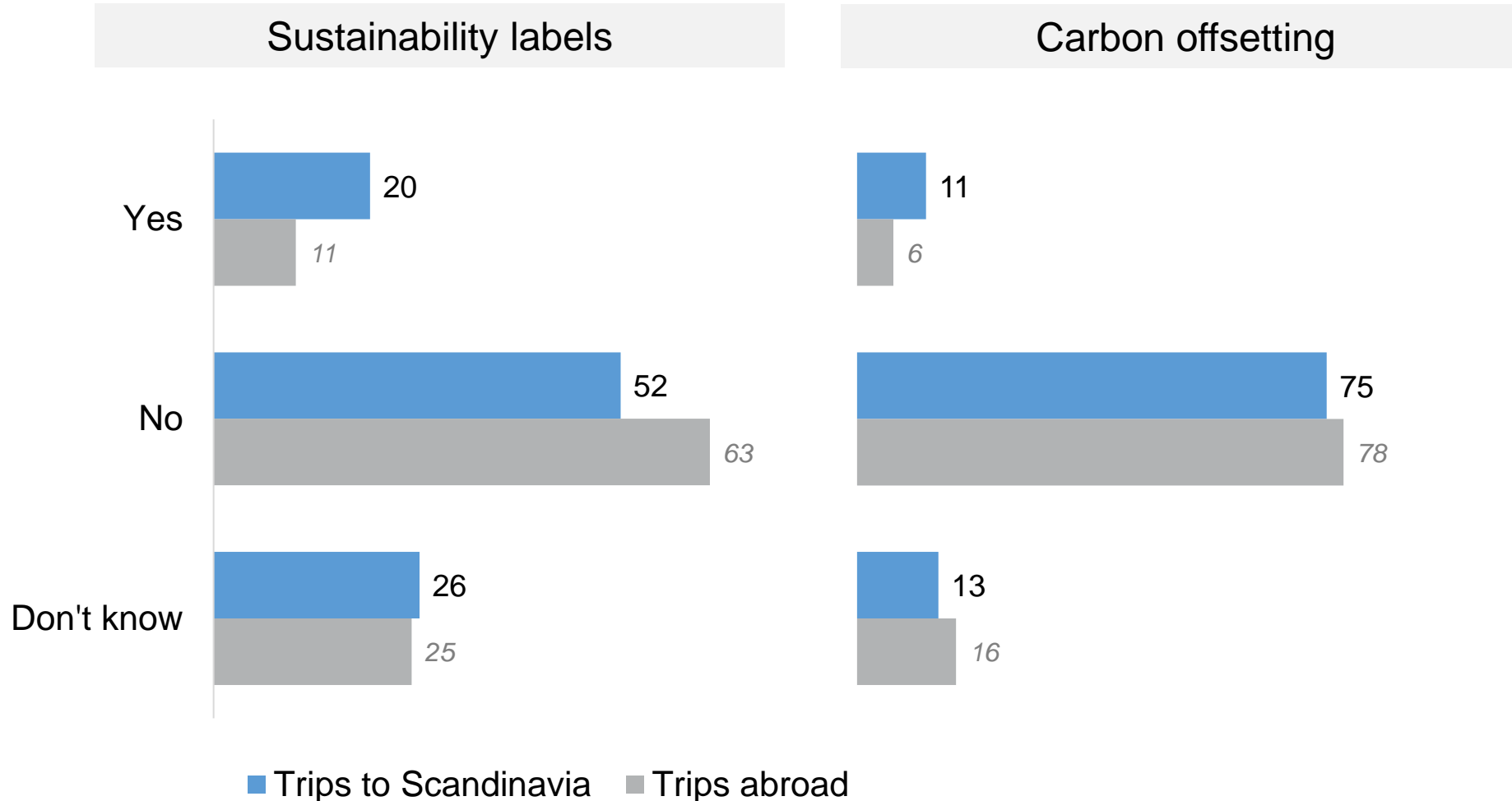
Holiday trips 5+ days to Scandinavia: Higher importance of sustainability compared to all trips abroad



- » In 7% of the holiday trips to Scandinavia, sustainability has been the decisive factor in deciding between otherwise equivalent offers.
- » With a further 22% of the trips to Scandinavia, sustainability was among other things an aspect in the decision for this trip.
- » Both figures are clearly above the level of all trips abroad.

Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
Basis: Holiday trips (5+ days) of German/German speaking population 2021-2023; Source: Reiseanalyse 2022-2024

Sustainability labels and carbon offsetting: More labels and more carbon offsetting than with all trips abroad



- » 20% of the accommodations or tour operators of trips to Scandinavia were labelled as sustainable. This is significantly more than for trips abroad (11%).
- » On 11% of the trips to Scandinavia there was carbon offsetting. This is significantly more than for trips abroad (6%).

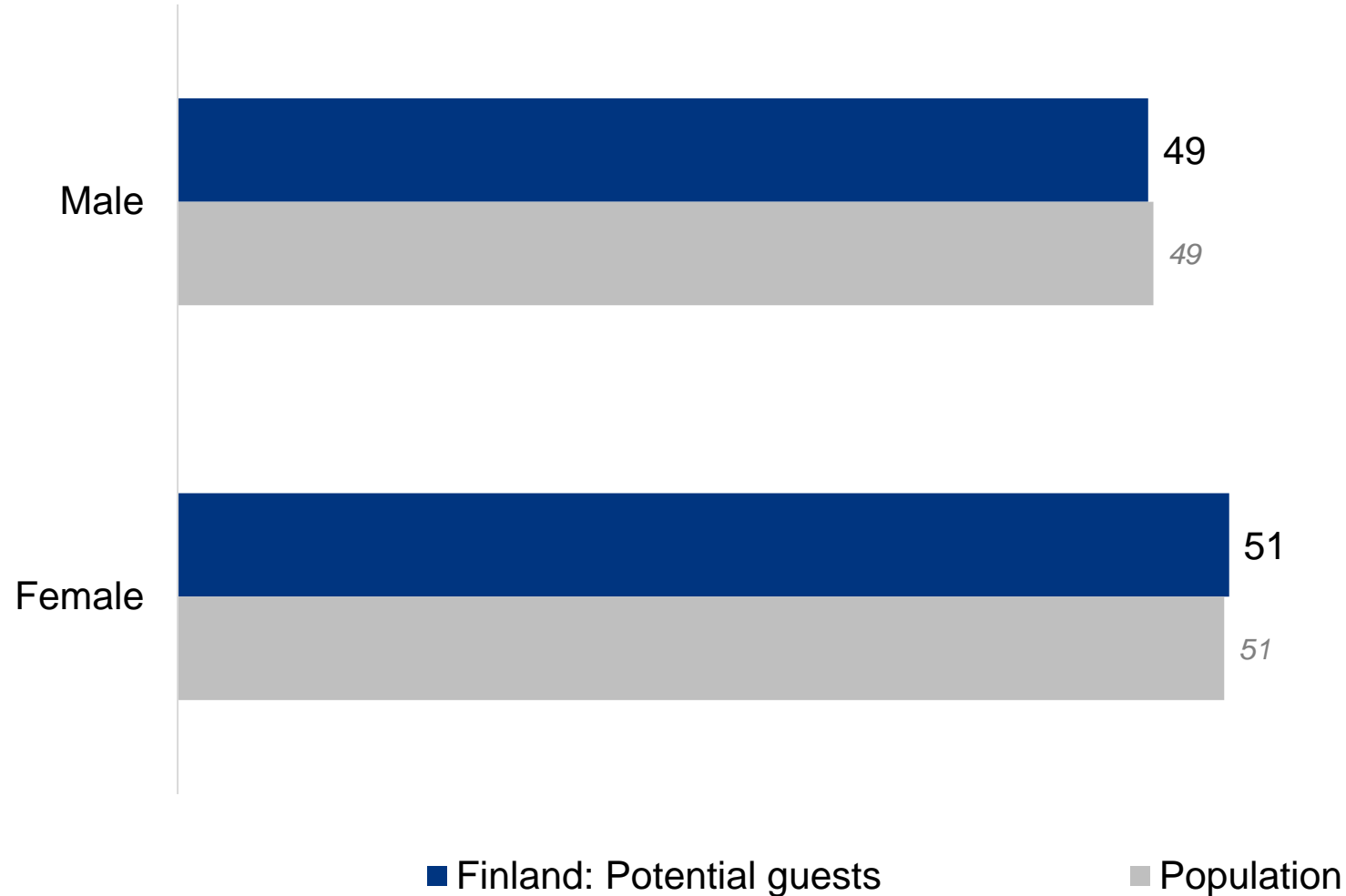
Trips to Scandinavia = Holiday trips (5+ days) to Sweden, Norway or Finland; in %
 Basis: Holiday trips (5+ days) of German/German speaking population 2021-2023; Source: Reiseanalyse 2022-2024

A photograph of a snowy forest at sunset. The trees are heavily covered in snow, and the sky is a mix of orange, red, and blue. The aurora borealis is visible in the sky, showing a green and blue glow. A dark blue semi-transparent box is overlaid on the left side of the image, containing white text.

4. Potential guests to Finland: Socio-demography

Potential guests to Finland 2024-2026: Sex

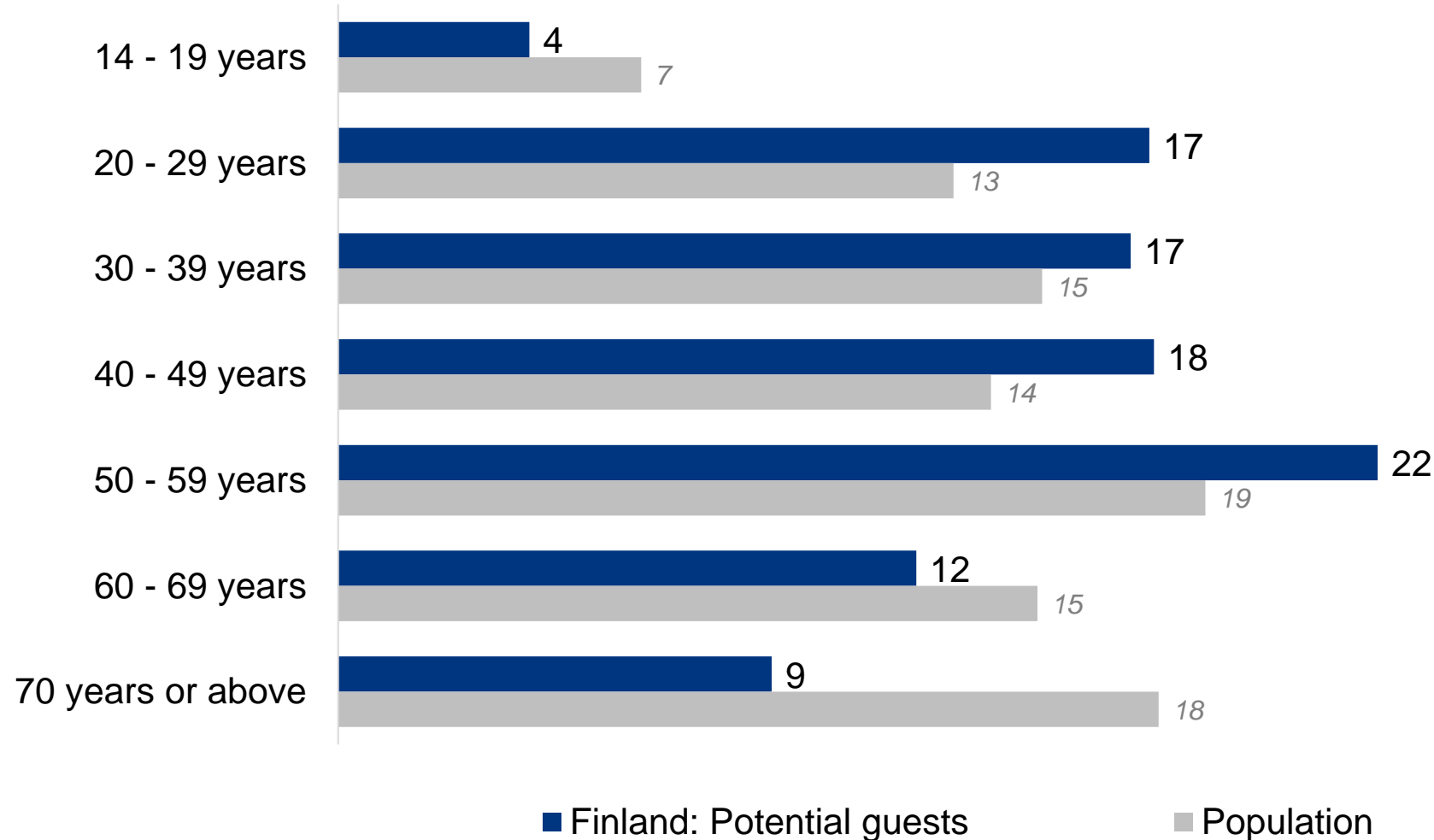
Slightly more men than women



» Within the potential guests to Finland there are just slightly more women (51%) than men (49%).

Potential guests to Finland 2024-2026: Age

Younger than actual guests and than the German average

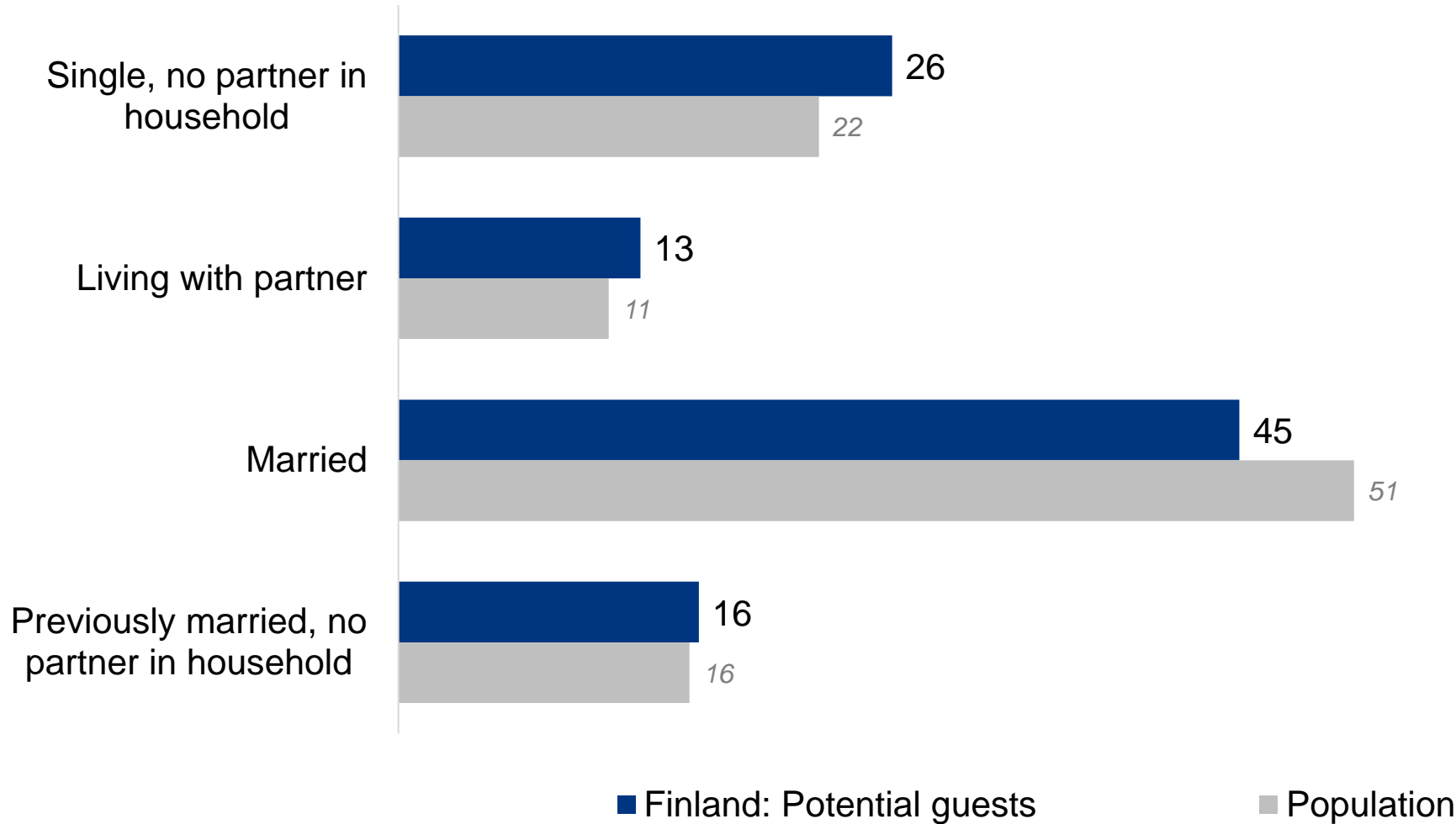


- » 21% of the potential guests to Finland are below 30 years old, 35% are 30-49 years old, 34% are 50-69 years old and 9% 70+ years.
- » Compared to the population, the age groups 20-59 are sticking out.

“Finland: Potential guests”: Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years; in %; Basis: German-speaking population 14+ years in Germany 2021-2023; Source: Reiseanalyse 2022-2024

Potential guests to Finland 2024-2026: Family status

Lots of married people with a partner in household

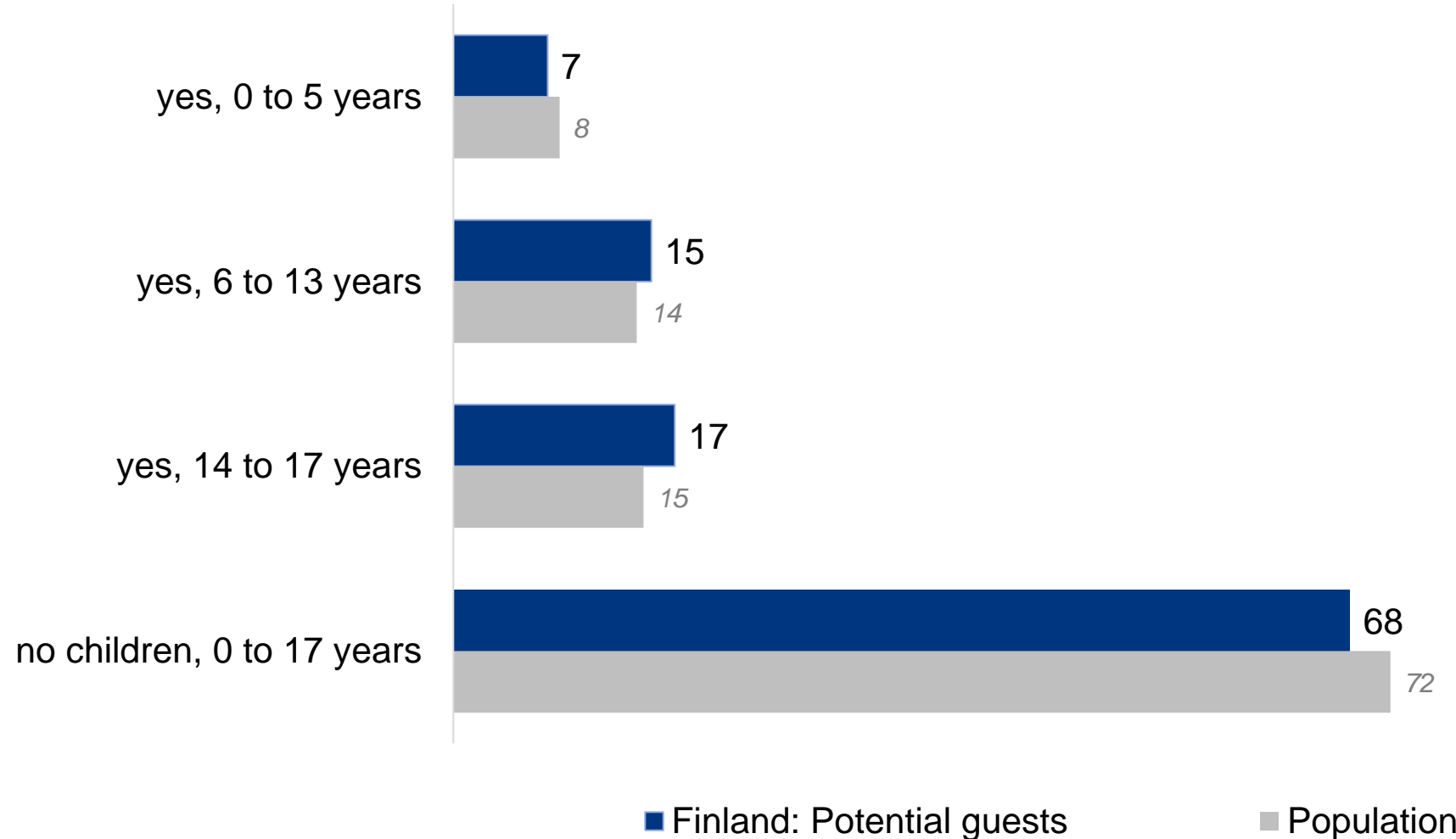


- » 58% of the potential guests to Finland are married or living together with their partner. The remaining part of the population is living without partner.
- » Compared with the population, we find more “singles”, not living with together with a partner.

“Finland: Potential guests”: Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years; in %; Basis: German-speaking population 14+ years in Germany 2021-2023; Source: Reiseanalyse 2022-2024

Potential guests to Finland 2024-2026: Children in household

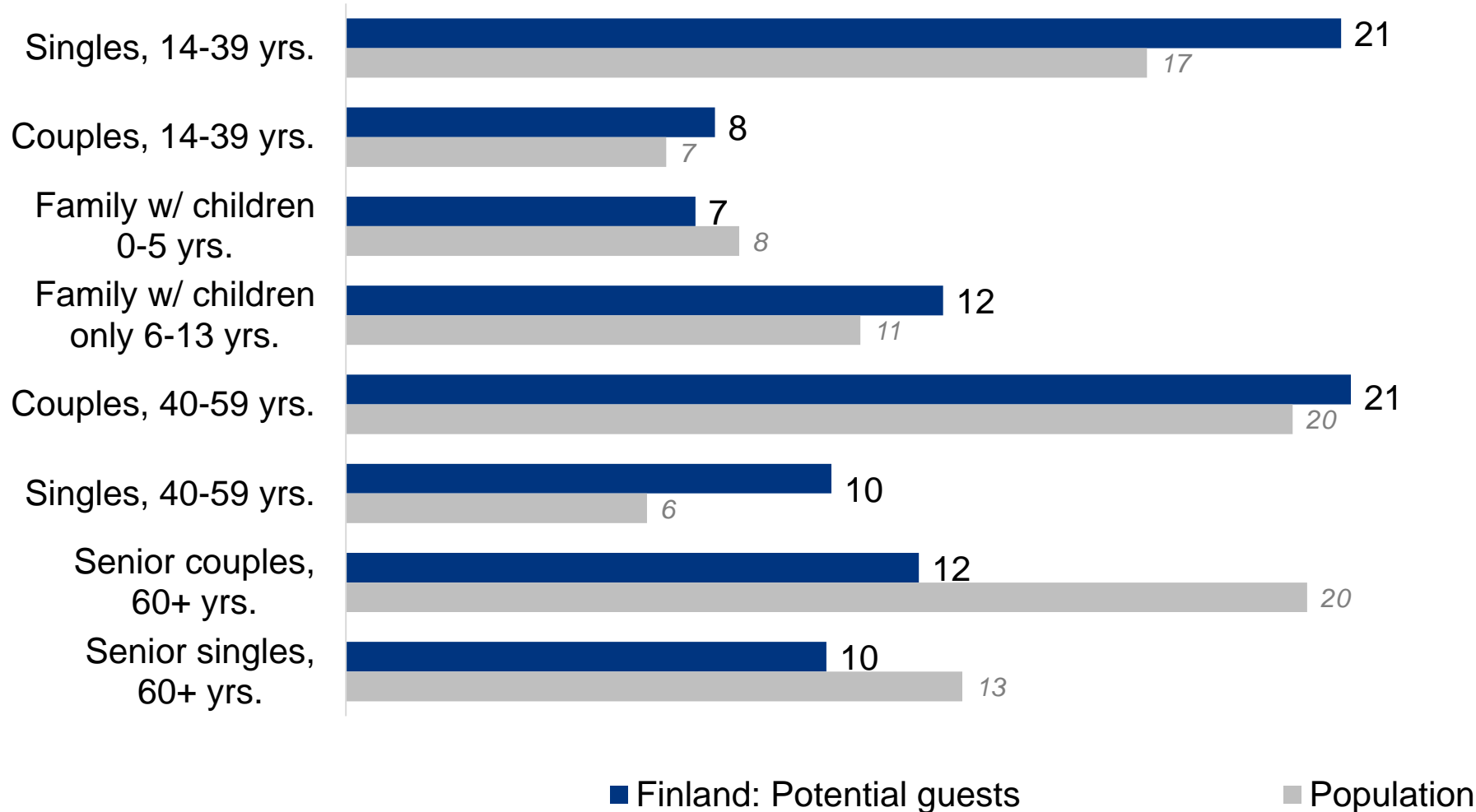
68% have no children in household



- » 32% of the potential guests to Finland live with children under 18 years in their households; most of them with school-children of 6-13 years and older children of 14-17 years.
- » The share of potential guests with children in their households is quite similar compared with the population.

Potential guests to Finland 2024-2026: Stages of life

Young singles and older couples are most important

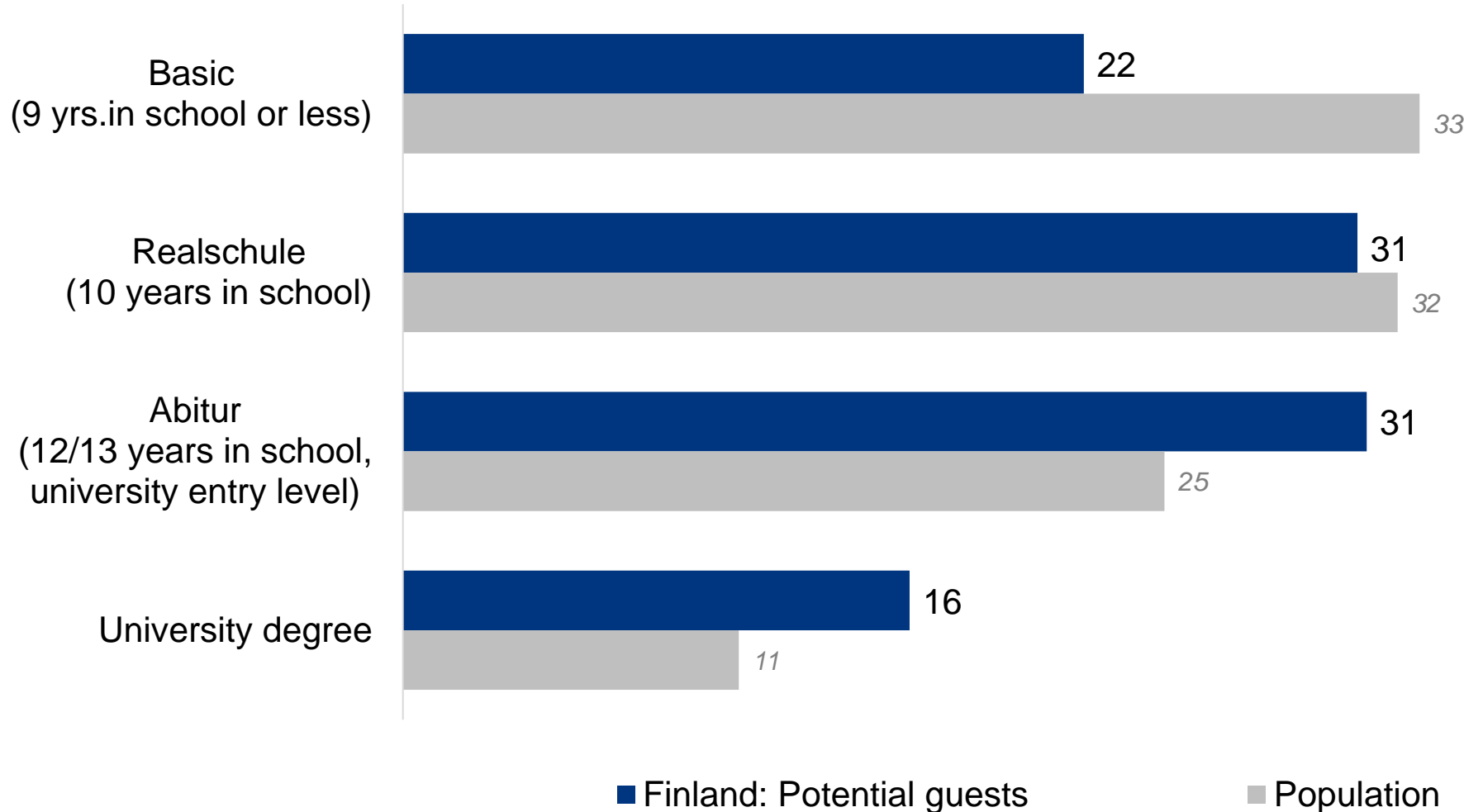


- » The stages of life is an aggregated variable, combining age, family status and children in household.
- » The biggest segment of potential guests to Finland are the singles without kids below 40 yrs., and couples between 40 and 59 yrs. (both 21%) followed by families with older kids and couples 60+ yrs.

“Finland: Potential guests”: Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years; in %; Basis: German-speaking population 14+ years in Germany 2021-2023; Source: Reiseanalyse 2022-2024

Potential guests to Finland 2024-2026: Education

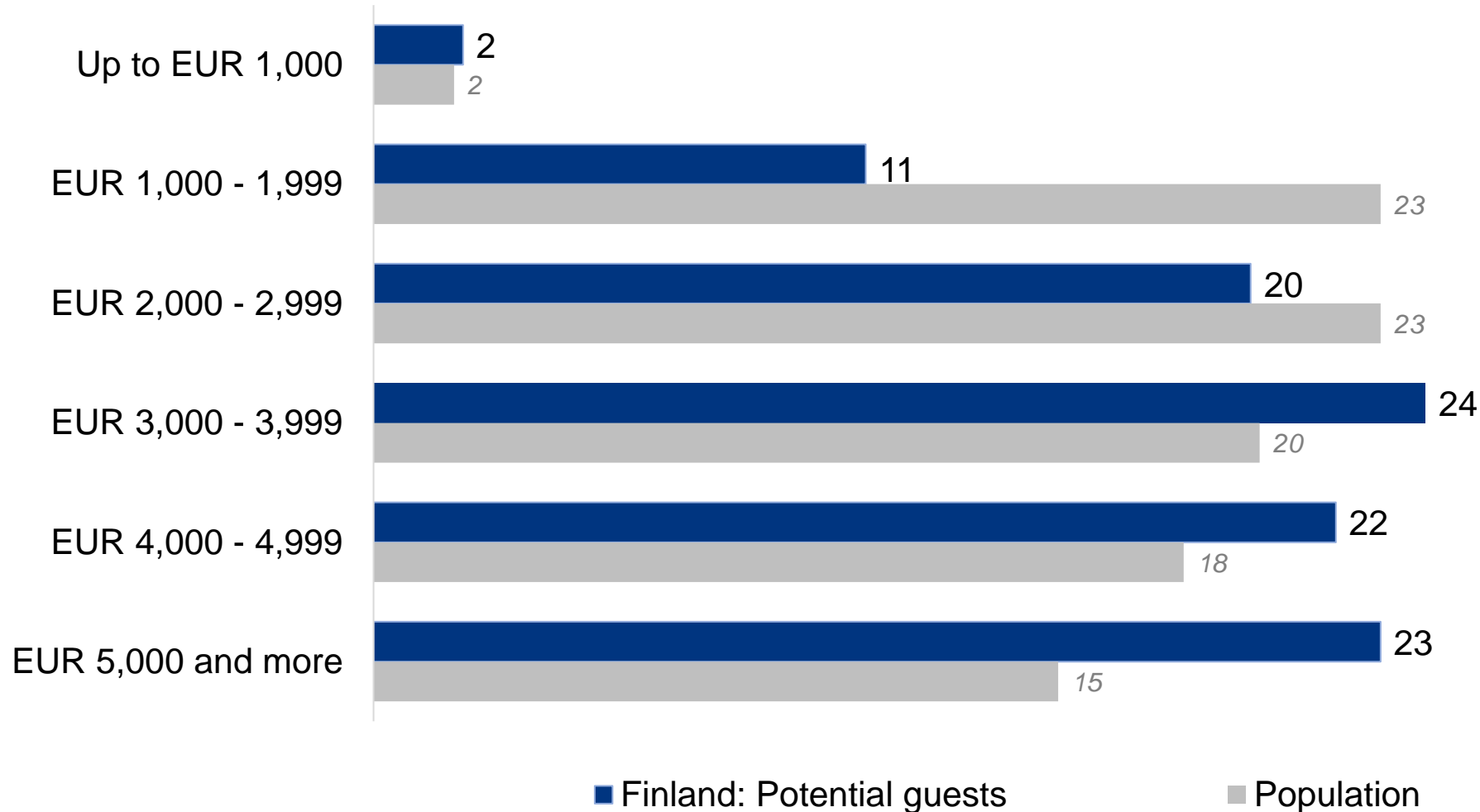
Education level a high above the German average



- » 47% of the potential guests to Finland have a higher education of at least 12/13 years at school, 31% have successfully finished 10 years of school, 22% have a basic education of 9 years at school or less.
- » This means the education level of the potential guests to Finland is higher than in the population.

Potential guests to Finland 2024-2026: Household net income

A little better off compared with the German population

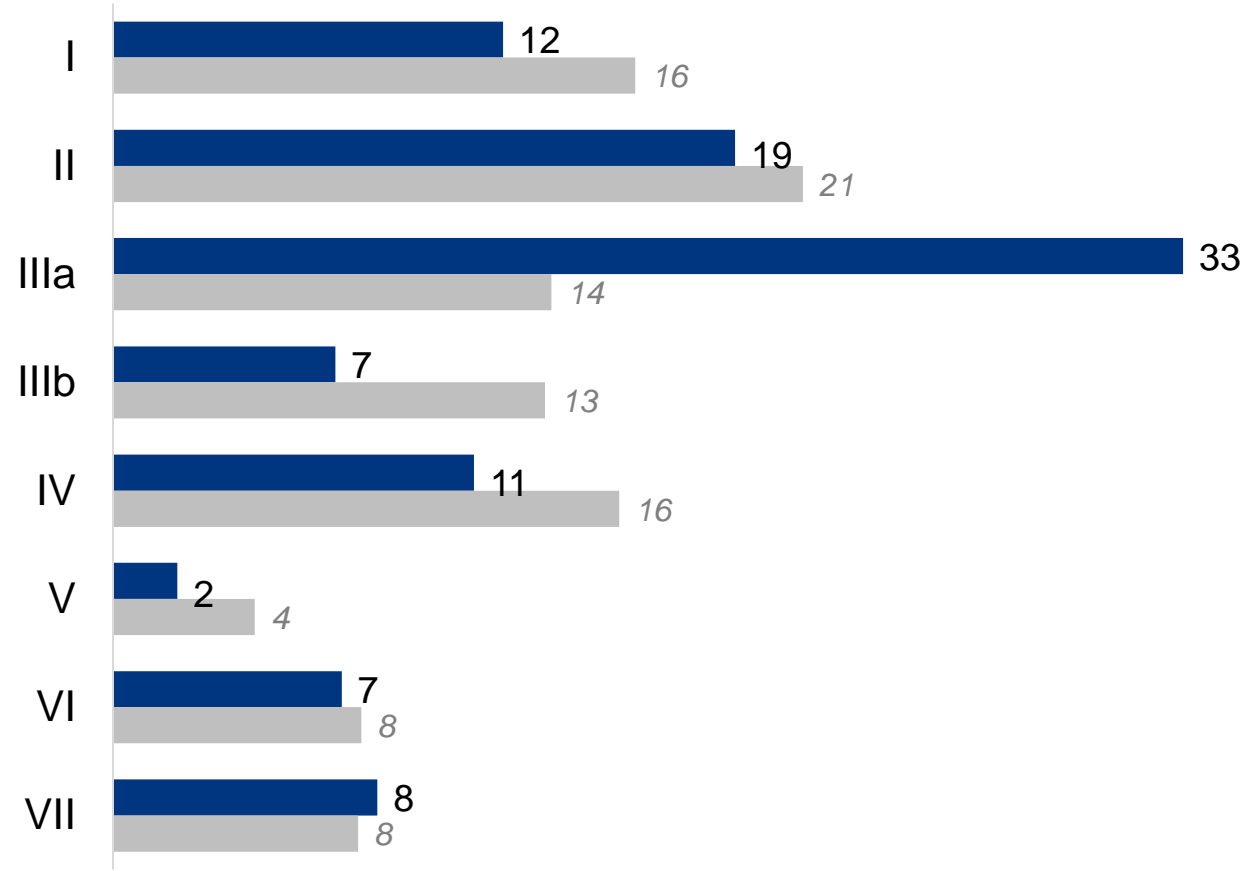


- » 69% of all potential guests to Finland have an monthly household net income of 3,000+ EUR, 20% an income of 2,000-2,999 EUR, 13% an income of up to 1,999 EUR.
- » The share of persons earning 5,000+ EUR is significantly higher among the potential guests to Finland (23%) than in the population (15%).

“Finland: Potential guests”: Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years; in %; Basis: German-speaking population 14+ years in Germany 2024; Source: Reiseanalyse 2024

Potential guests to Finland 2024-2026: Residency

Most are living in the North and West of Germany



- » 31% of the potential guests to Finland are from the North-West (Nielsen I and II)
- » 33% from Hesse, Rhineland Palatinate, Saarland
- » 21% are from the East
- » 14% from the South
- » Compared with the population, we find more potential guests to Finland living in the West of Germany.

■ Finland: Potential guests ■ Population



“Finland: Potential guests”: Respondents who are almost definitely planning or would generally consider to go to Finland for a holiday in the next three years; in %; Basis: German-speaking population 14+ years in Germany 2021-2023; Source: Reiseanalyse 2022-2024



5. Thematic motivation and interests of potential guests to Finland

Potential guest to Finland: General holiday motivation

Get away from daily routine, recuperate and relaxation

Very important aspects when on holiday	%	Index*
Get away from daily routine	82	121
Relaxation, no stress, no pressure	78	120
Recuperate	78	123
Fun, amusement, enjoy myself	77	118
Sun, warmth, good weather	74	112
Freedom, free time	73	140
Enjoy nature (beautiful scenery, clean air, clean water)	69	129
Spend time with people close to me (partner, family, children, friends)	67	122
Spoil myself, treat myself to something	65	116
Get completely new impressions, discover something totally different	63	144
New experiences, diversion from the ordinary, do a lot of different things	63	153
Rest, do nothing, be lazy	61	124
Travel around, be on the move	61	151
Get to know other countries, see the world	59	172
Healthy climate	57	153

Very important aspects when on holiday	%	Index*
Share experiences, do something with nice people	54	148
Do something for my appearance, get a tan, get a nice, healthy glow	48	128
Meet new people	48	175
Do something for my health	47	148
Do something cultural and educational	45	200
Be entertained	45	159
Gentle sports or games/fitness	45	153
Revisit an area, relive memories of a place	44	124
Meet the locals	42	158
Escape from pollution	40	179
Adventure, take risks, do something extraordinary	35	231
Flirt, holiday romance, sex/erotic experience	25	222
Play with the children, spend time with them	22	114
Sports	16	189

- » For potential guests to Finland, the most important general motives to go on a holiday are to get away from daily routine, relaxation, recuperate, fun and enjoyment, freedom and enjoying nature.
- » Nature is very important for 69% of the potential guests to Finland and above the population average.
- » Compared with the population, the potential guests are much more curious to see the world, to do something cultural, to do something extraordinary, to escape from pollution, adventure, flirt and sports.

* Index (100)= Population average (light green: Index 140-199, dark green: Index 200+)

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; Source: Reiseanalyse 2022-2024

Potential guest to Finland: General holiday activities Excursions, local food/drinks, shopping

<i>Holiday activities: frequently exercised during last 3 years</i>	%	<i>Index*</i>
Trips, excursions	85	118
Eating local specialities	82	116
Window shopping, shopping	77	113
Swimming in a lake or the sea	72	114
Visiting natural attractions	62	164
Rest, relax, catch up on sleep	59	135
Visiting sites of cultural or historical interest/museums	59	156
Swimming in a pool	57	116
Walking tours/hiking	55	175
Gentle sports	52	149

<i>Holiday activities: frequently exercised during last 3 years</i>	%	<i>Index*</i>
Making new friends	51	144
Cycling	34	172
Visiting amusement parks	25	175
Playing with the children	25	118
Used spa facilities	24	205
Visit to a winery/winemaker	15	218
Ride an e-bike	11	175
Downhill skiing/snowboarding	8	181
Cross-country skiing	4	200

- » For potential guests to Finland, the general holiday activities they most frequently engage in are excursions, eating local specialties, shopping and swimming in a lake or the sea.
- » Compared with the population, they are more active, more into nature and culture, into meeting new people and wellness.

* Index (100)= Population average (light green: Index 140-199, dark green: Index 200+)

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 2021-2023; Source: Reiseanalyse 2022-2024

Potential guest to Finland: General interest in types of holiday

Showing at the same time opportunities and challenges

<i>Almost definitely planning or generally considering to go next 3 years</i>	%	Index*
Holiday to rest and relax	80	120
Beach holiday	78	119
Vacation in a holiday apartment	76	150
Vacation in a holiday home	72	169
City holiday	66	183
All-Inclusive-holiday	62	134
Family holiday	61	138
Adventure/Experience holiday	60	207
Nature holiday	57	170
Visiting family and friends	55	148
Winter holiday in the warmth	55	208
Tour	51	259
Cruise	50	279
Winter holiday in the snow	50	268
Spa holiday	47	222

<i>Almost definitely planning or generally considering to go next 3 years</i>	%	Index*
Vacation in a holiday camp/holiday park/Center Parc	45	235
Sightseeing holiday	45	249
Activity holiday	43	262
Motor caravan holiday	39	314
Cultural holiday	38	325
Health holiday	37	227
Holiday on a farm	36	286
Club holiday	35	230
Bus/coach tour	31	185
Caravan holiday	30	314
Study trip	30	413
Health spa holiday (with medical treatments)	29	238
Party holiday	28	228
Camping holiday (tent)	26	309

- » The highest general interest with potential guests to Finland can be found concerning holiday to relax, sun&beach, vacation in a holiday apartment/home, city trips and all-inclusive holiday.
- » The types of holiday high on the index ranking show at the same time opportunities (when the interest is fitting with Finland's tourism offer), e.g. nature, activity, camping, study trip, culture, and challenges (when the interest is NOT fitting with Finland's tourism offer), e.g. sun&beach, all inclusive holidays, winter in the sun).

* Index (100)= Population average (light green: Index 140-199, dark green: Index 200+)

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; Source: Reiseanalyse 2022-2024

**NATURE &
„Erlebnis“**

CURIOSITY
genuine
interest in
destination


**CULTURE,
WELLNESS
too.**

ACTIVE

**Conflicting
interests**
...

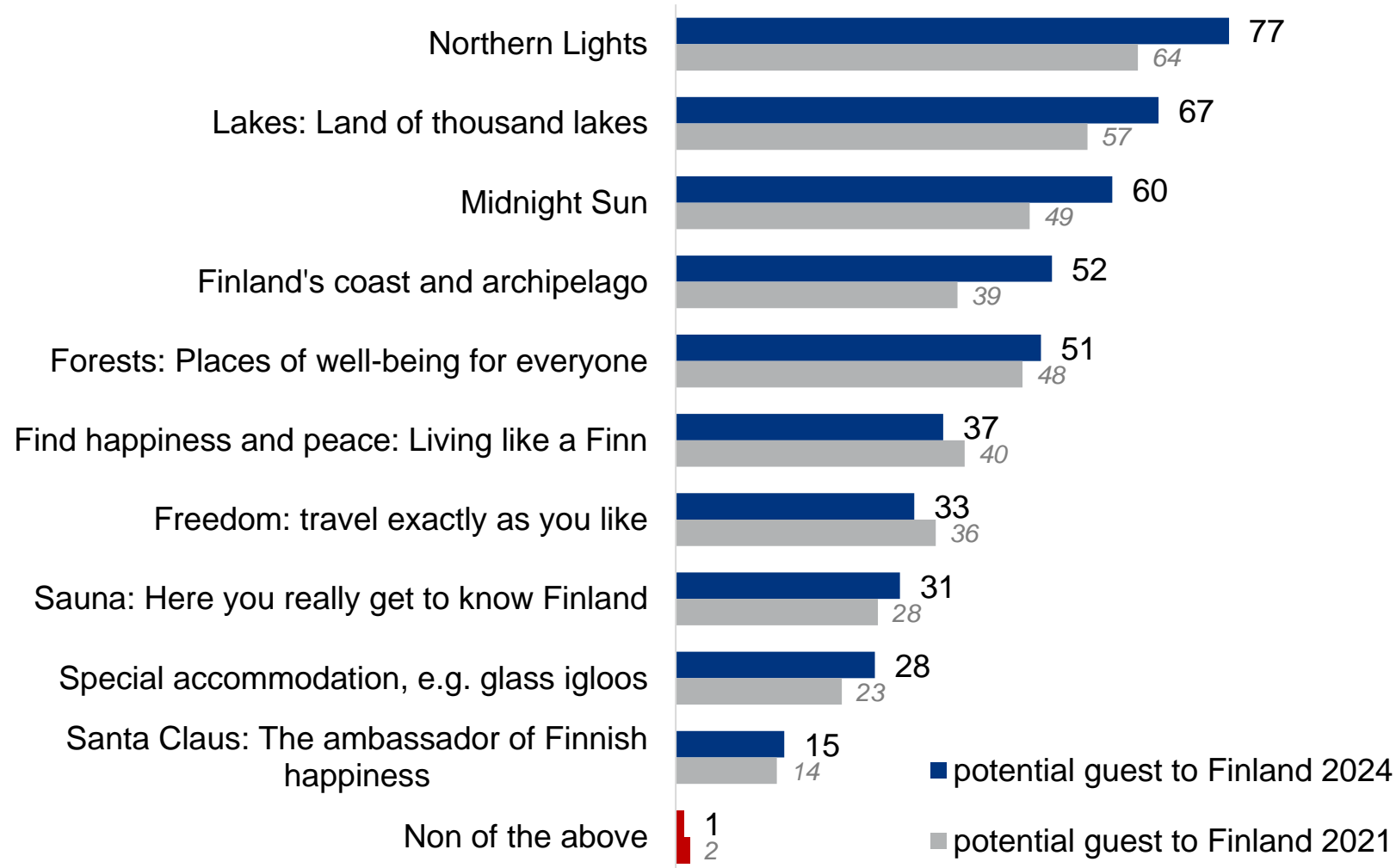


Visit Finland

A woman with long dark hair, wearing a colorful striped dress, is sitting on a wooden dock by a lake. She is seen from behind, looking out at the water. The sun is low on the horizon, creating a warm, golden glow and reflecting off the water's surface. In the foreground, an open book and a small orange mug are placed on the wooden planks. The background shows a calm lake with some rocks and distant hills under a soft sky.

6. Deep-dive 1: Finland perception
and plans of potential travellers

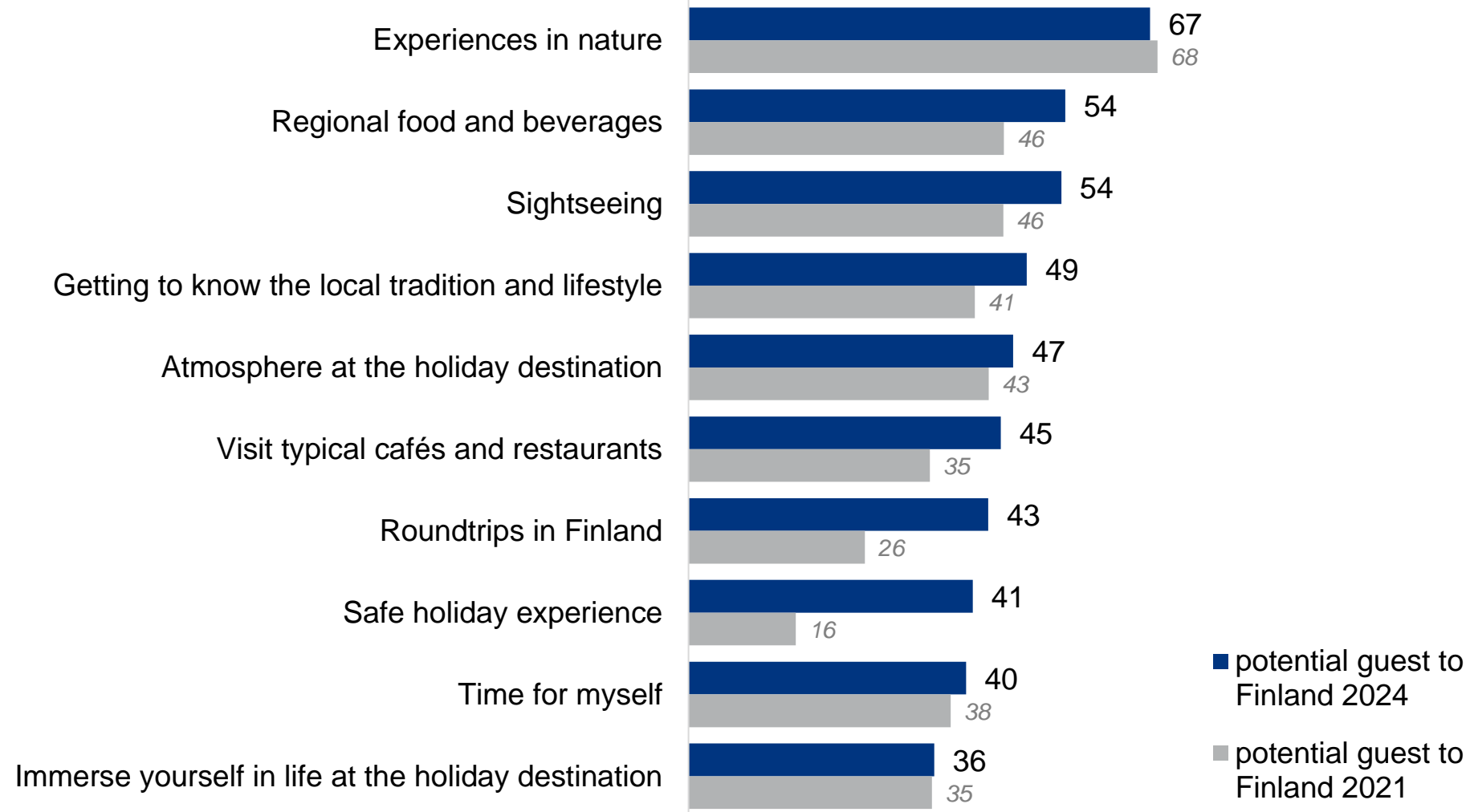
Highlights of Finland: Northern Lights, Lakes, Midnight Sun, coast and archipelago



- » Potential guests to Finland think the special highlights of Finland are Northern Lights, Lakes, Midnight Sun and Finland's coast and archipelago.
- » Besides these natural features, also the intangible Finnish happiness and Freedom play a quite important role – they are more important than the Sauna and Santa Claus.
- » Compared to the previous survey in 2021 most aspects have increased, most significantly the Top4.

F2: What do you think are the special highlights of Finland as a holiday destination? Please select all answers that are applicable; in %
 Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

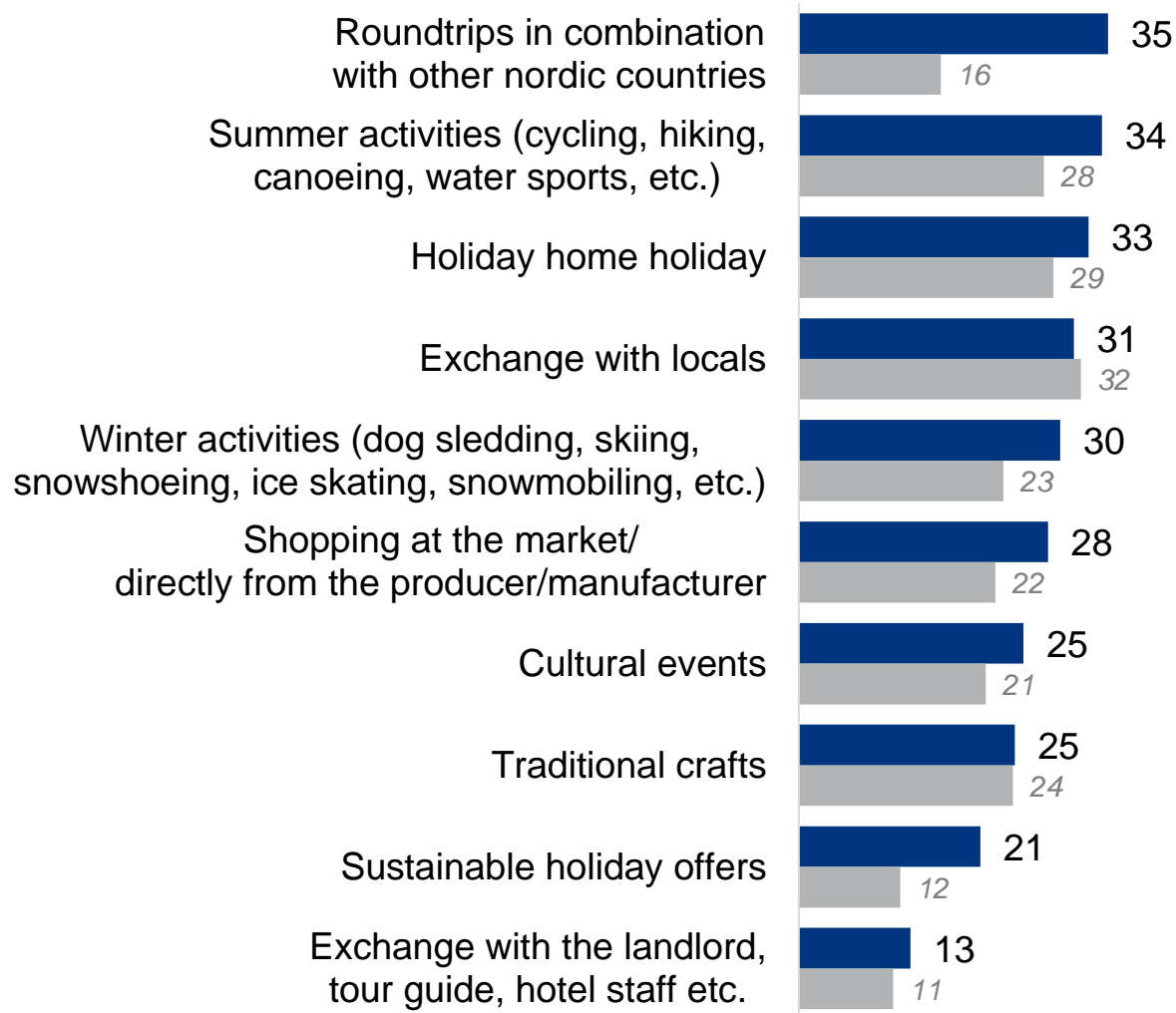
Like to experience in Finland Top 10: Nature, food, sights – but also getting to know the local tradition



- » When asking the potential guest to Finland about what they want to experience on a trip to Finland, we see again the dominance of nature.
- » But after nature, we see a variety of aspects like regional food and beverages, sightseeing or getting to know the local tradition and lifestyle.
- » Compared to the last survey in 2021, roundtrips in Finland and safety have increased most significantly.
- » Please find the ranks 11-20 of this question on the following slide.

F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
 Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

Like to experience in Finland Top 11-20: Secondary experiences but nevertheless not unimportant

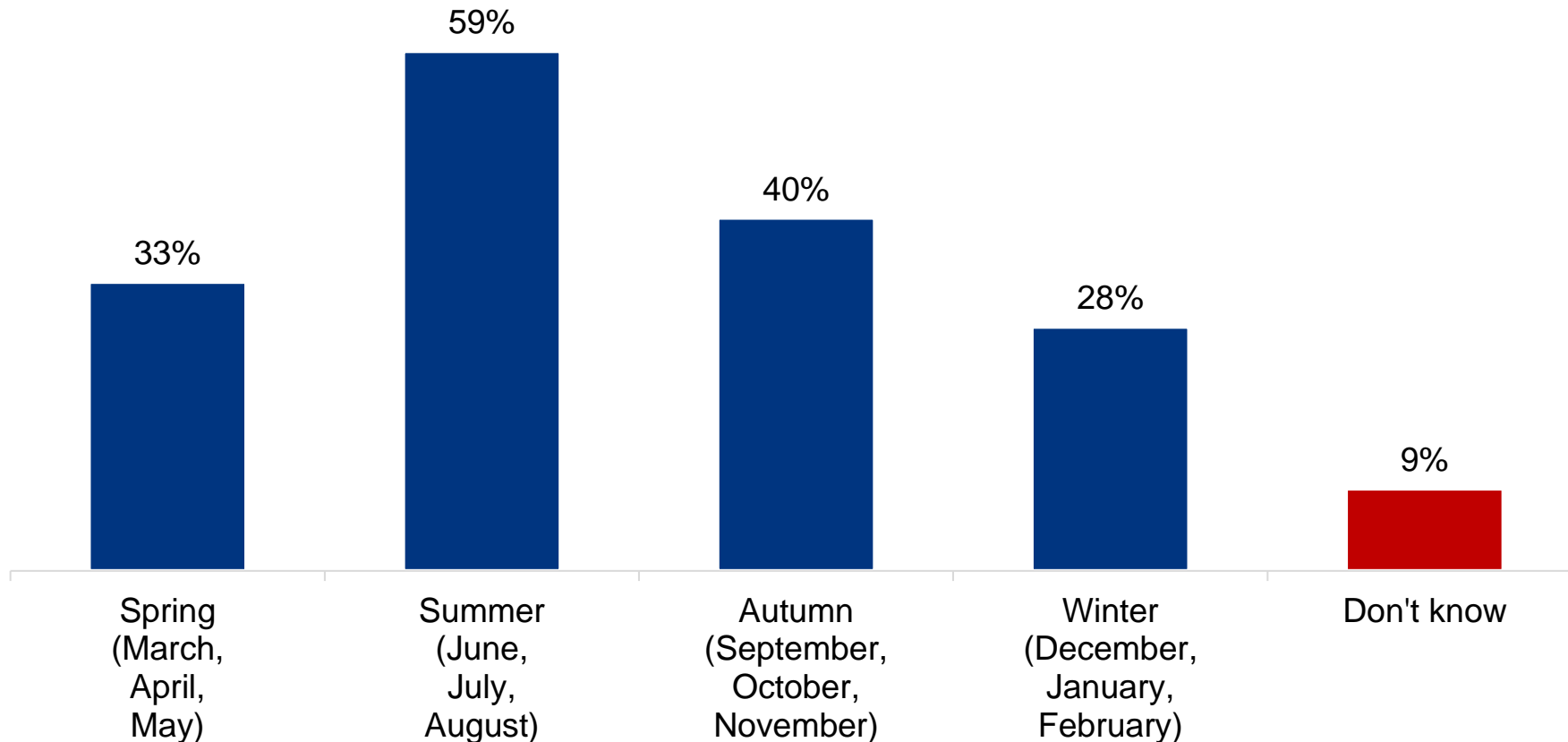


- » Even in the ranks 11-20 of this question, most aspects are liked by one quarter to one third of the potential guests to Finland.
- » The biggest increases since the last study in 2021 can be found with roundtrips in combination with other Nordic countries and sustainable holiday offers.

■ potential guest to Finland 2024
 ■ potential guest to Finland 2021

F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
 Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

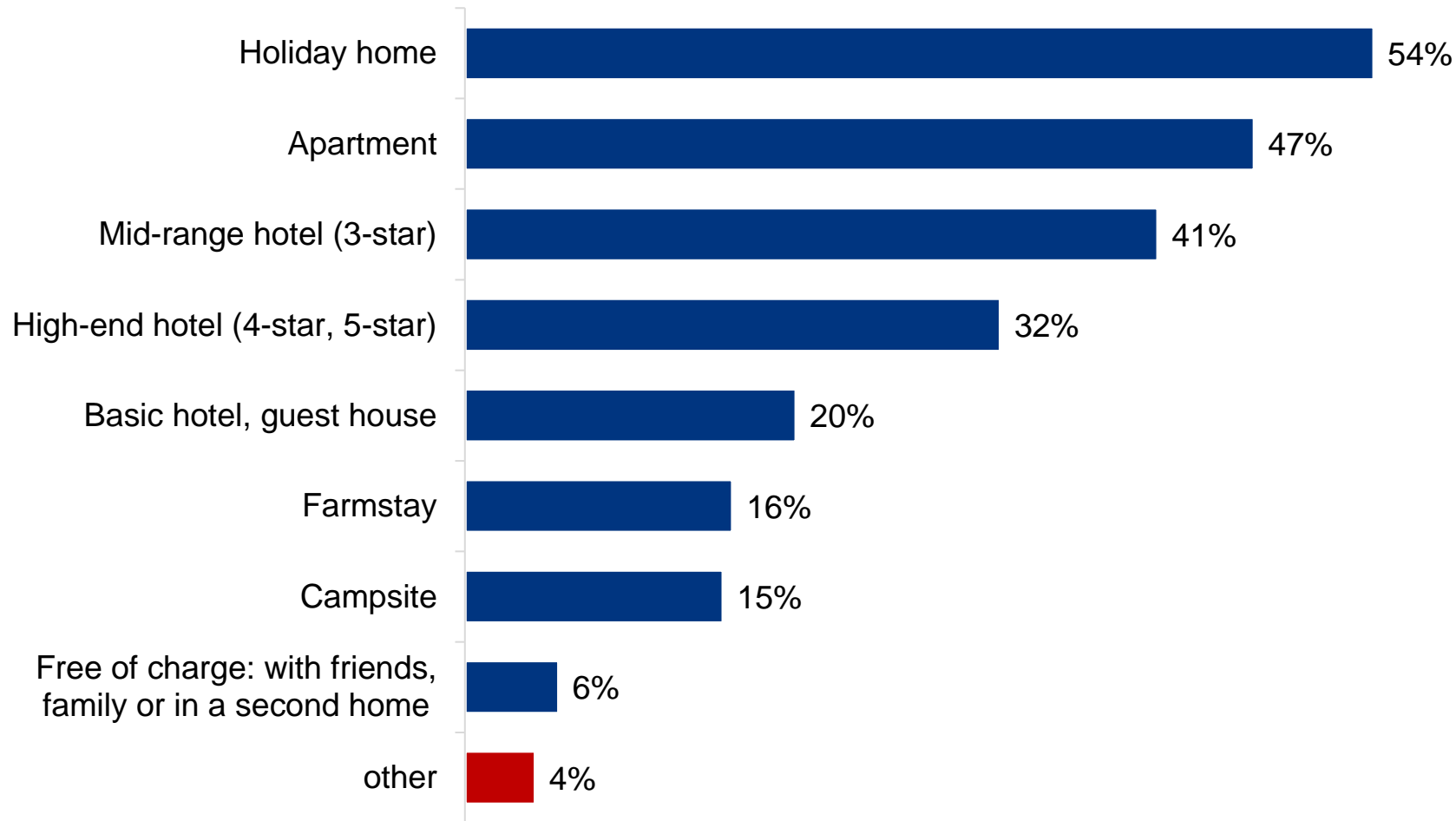
Preferred season to visit Finland: Almost 60% would like to travel to Finland in summer, 40% in autumn



» 59% of the Finland Potential would like to travel to Finland in summer, 40% in autumn and 33% in spring, 28% would visit Finland in winter.

F4a: At what time of the year would you like to travel to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

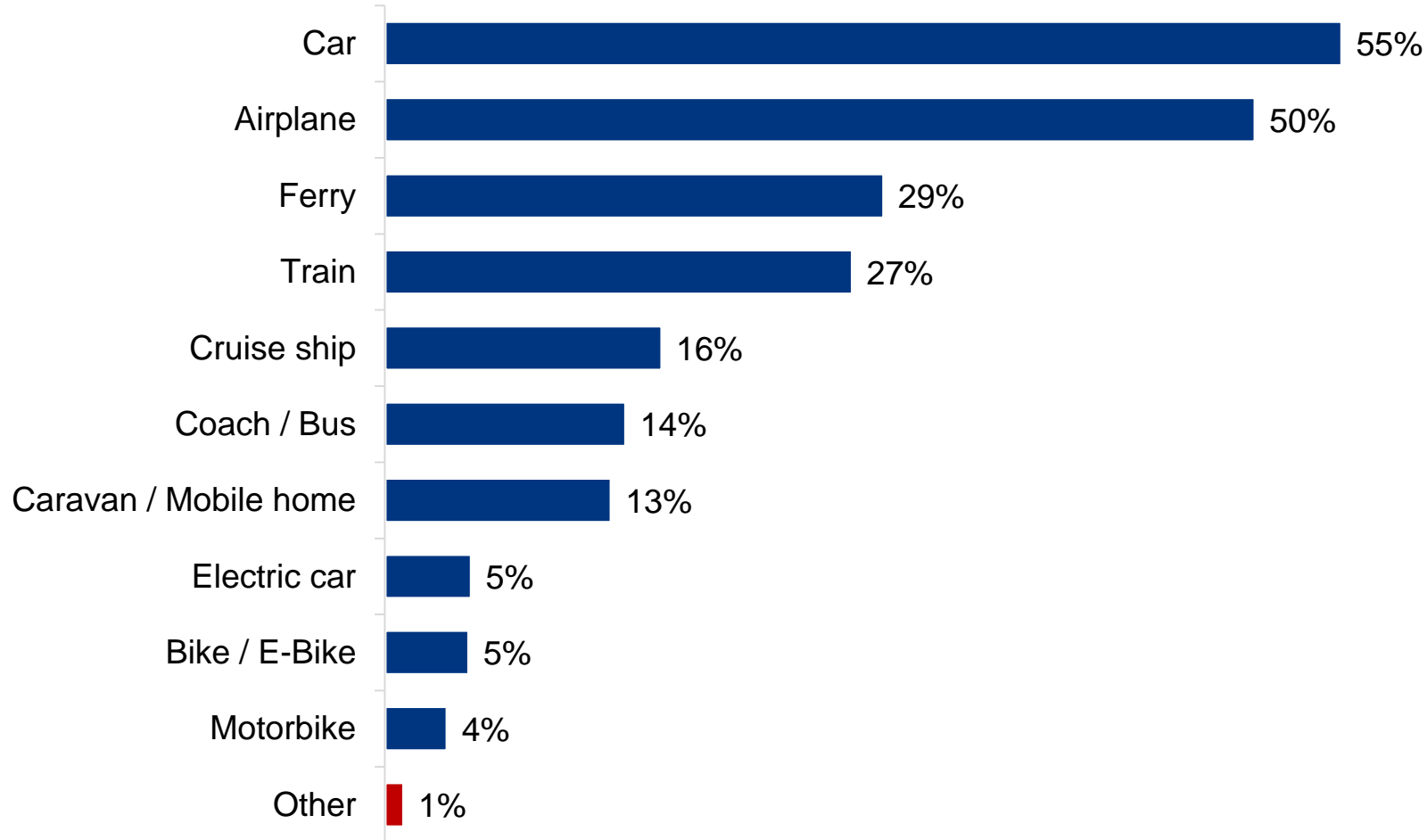
Type of accommodation: More than 50% would choose a holiday home as accommodation for a holiday to Finland



- » 54% of the potential guest to Finland would choose a cottage/holiday home as type of accommodation for a holiday in Finland, followed by apartments (47%) and mid-range hotels (41%).
- » A campsite is an option for 15% of the potential guests to Finland.

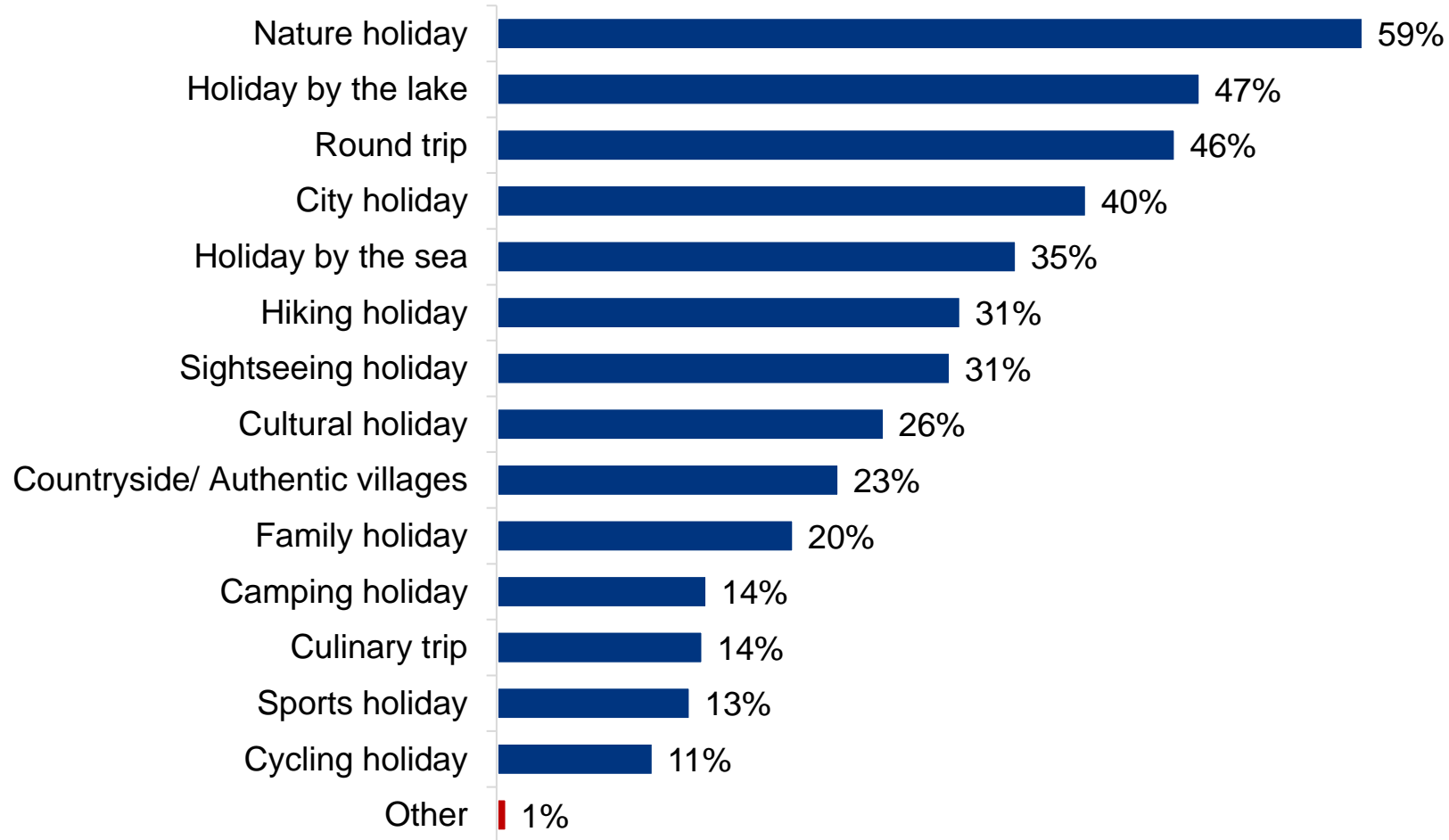
F5a: Which type of accommodation would you probably choose for a holiday to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Mode of transport: 55% would choose the car, 50% the airplane and around 30% the ferry or train



- » Regarding the means of transport, 55% resp. 50% would choose the car or plane as a means of transport for a trip to Finland.
- » 29% would like to choose the ferry and 27% the train.
- » Motorbike, Bike or S-Pedelec as means of transport are only relevant for 4-5% of the Finland Potential.

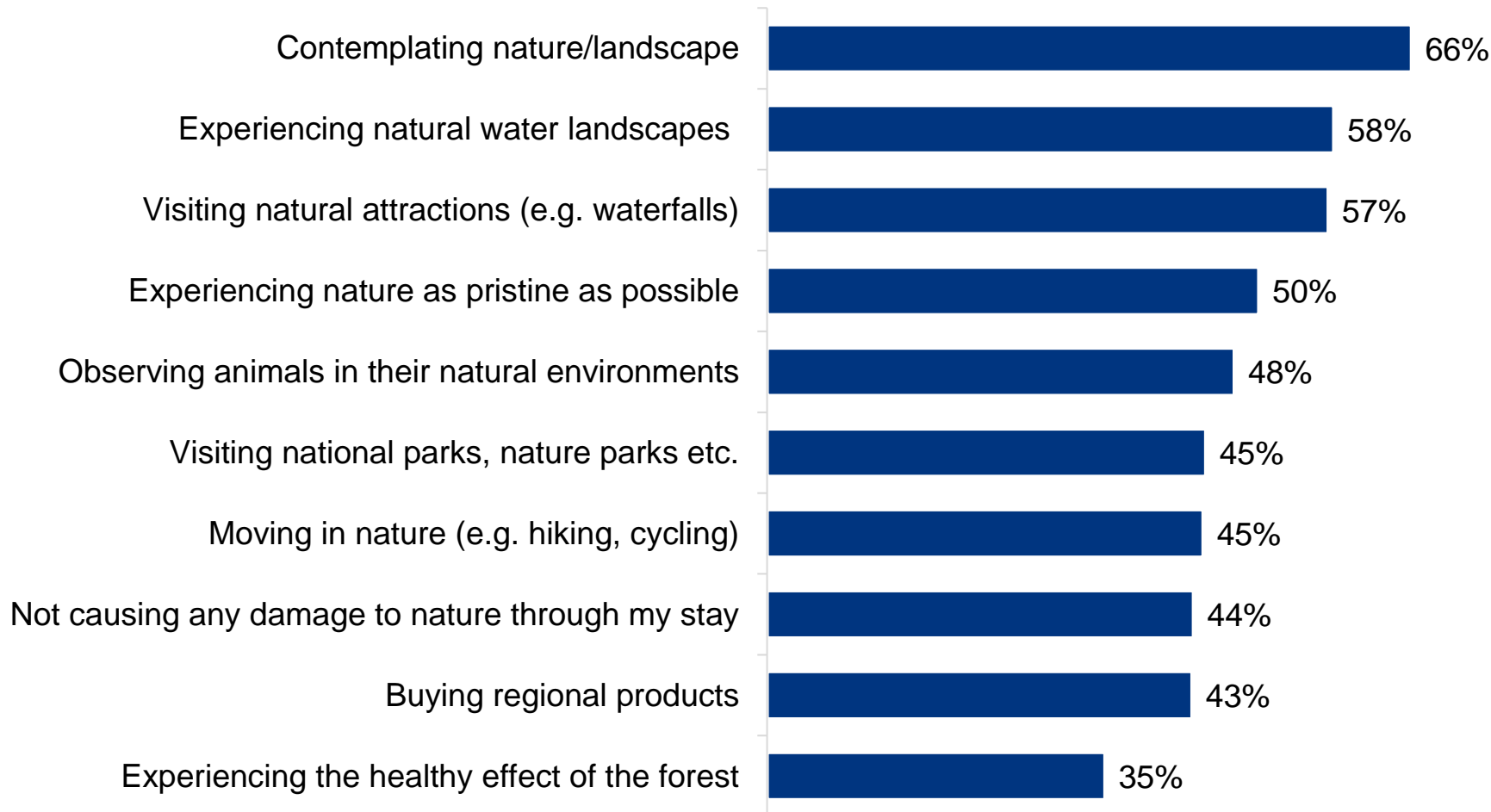
Type of holiday: Nature holidays, holidays by the lake, round trips and city holidays are of most interest



- » Here we show what kind of holidays the potential guests would like to spend in Finland.
- » The top three holiday types are: nature holidays, holidays by the lake and round trips.
- » Holiday types such as culinary trips, sports holidays or cycling holidays are quite small segments within the potential guests to Finland

F7a: Which type of holiday would you like to spend in Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

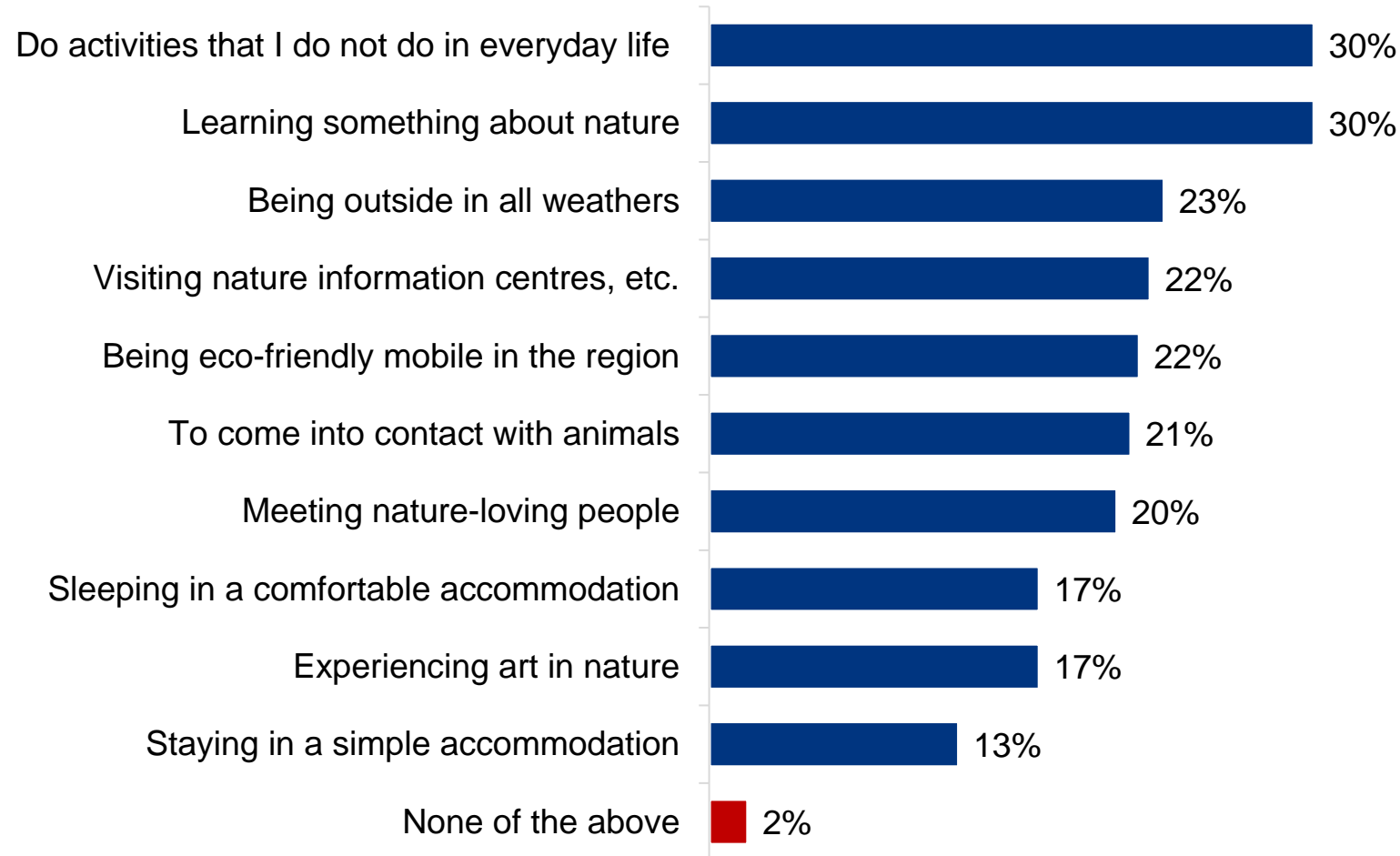
Nature experience Top 10: For two thirds contemplating nature/landscape is most important when experiencing nature



- » The top three most important things when experiencing nature are: contemplating nature/landscape, experiencing natural water landscapes and visiting natural attractions.
- » Please find the ranks 11-20 of this question on the following slide.

F8a: What is particularly important to you when experiencing nature on future holiday trips to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Nature experience 11-21: Secondary aspects but nevertheless not unimportant

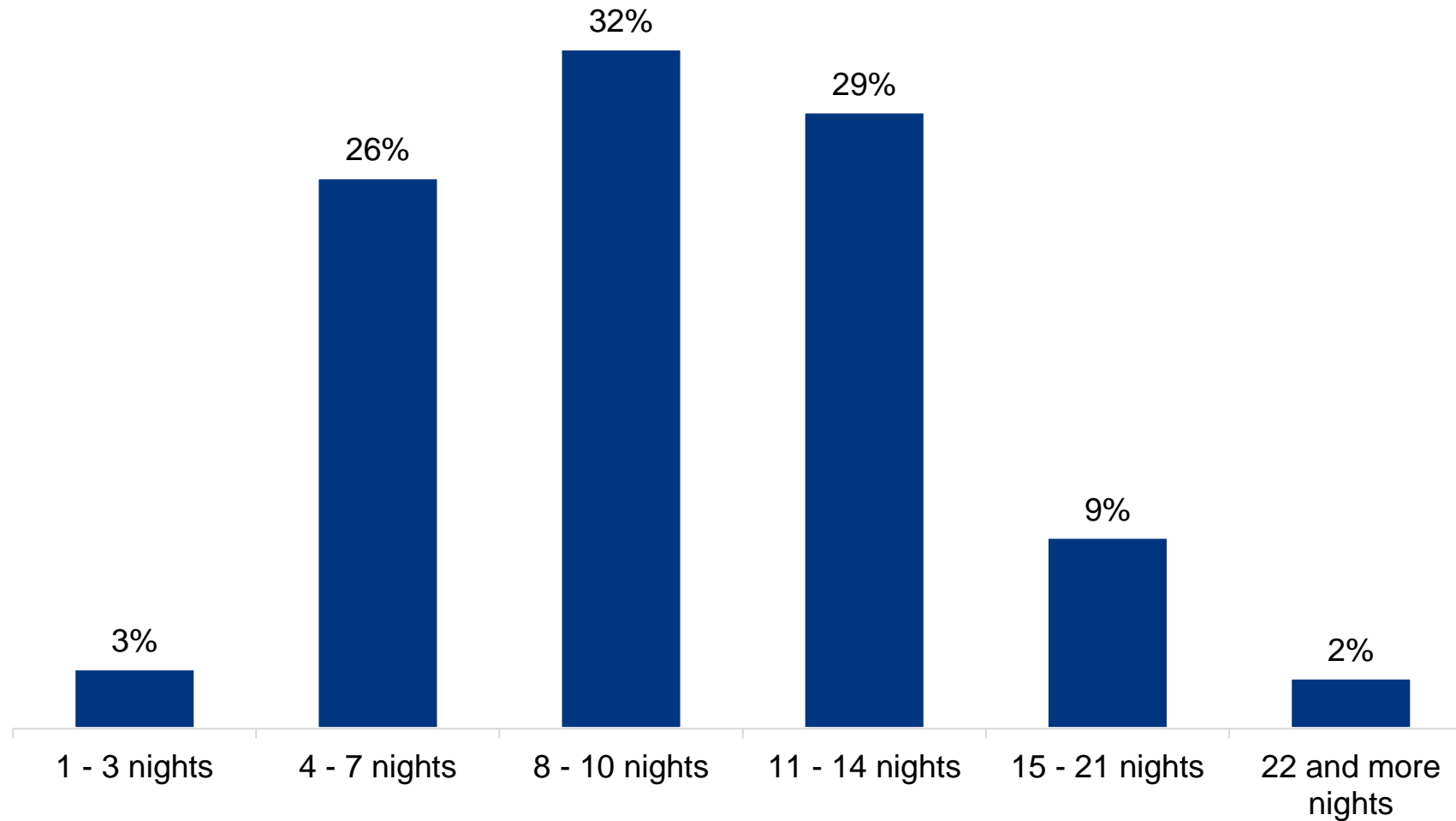


» Even in the ranks 11-20 of this question, most aspects are liked by 20% to 30% of the potential guests to Finland.

F8a: What is particularly important to you when experiencing nature on future holiday trips to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Duration of trip:

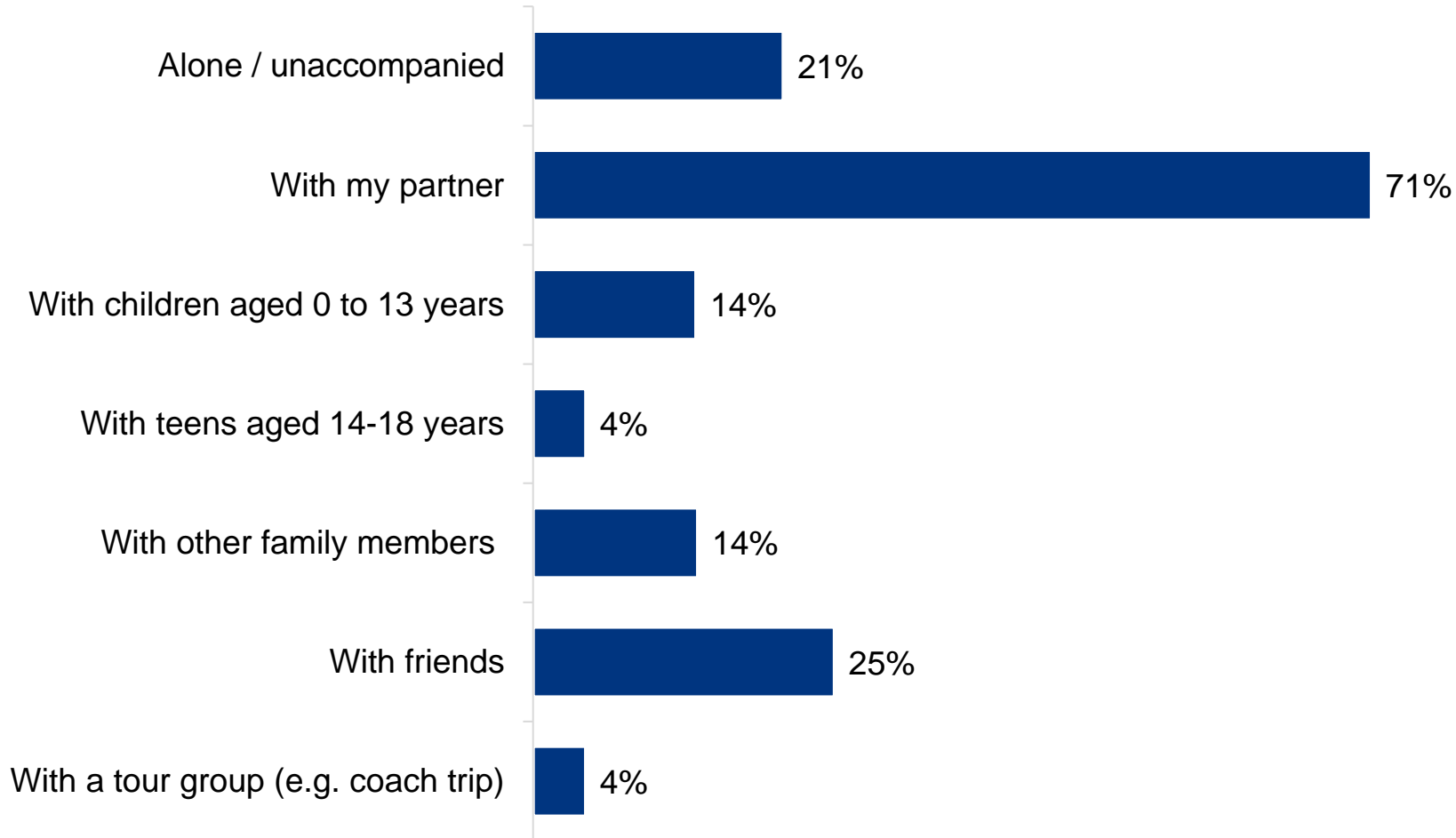
The vast majority would like to stay 1-2 weeks in Finland



- » 32% of the potential guests to Finland would like to stay 8-10 nights during their next trip to Finland.
- » Slightly less (29%) for 11-14 nights and 26% for 4-7 nights.
- » 2% can imagine a stay for 22 and more nights in Finland.

F9a: How long would you like to stay in Finland for your next holiday?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

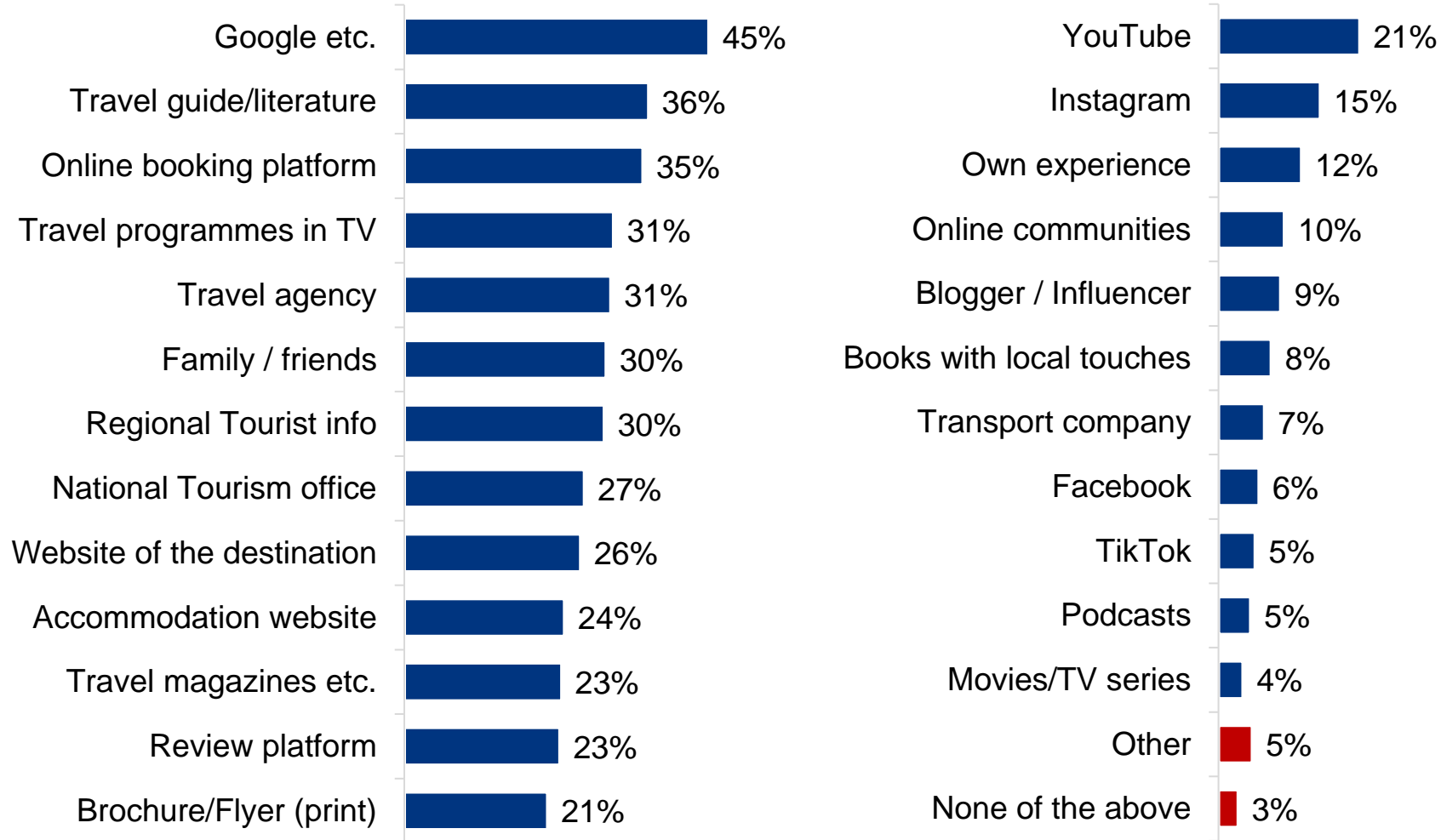
Travel companions: 21% would travel alone, 71% with their partner and a quarter with friends



- » 21% would make the future trip to Finland unaccompanied and 71% would take their partner with them.
- » 18% are interested in travelling with their children/teens and another 14% would like to make the trip with other family members.
- » One quarter can imagine travelling with friends.

F10a: With whom would you like to make a future trip to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

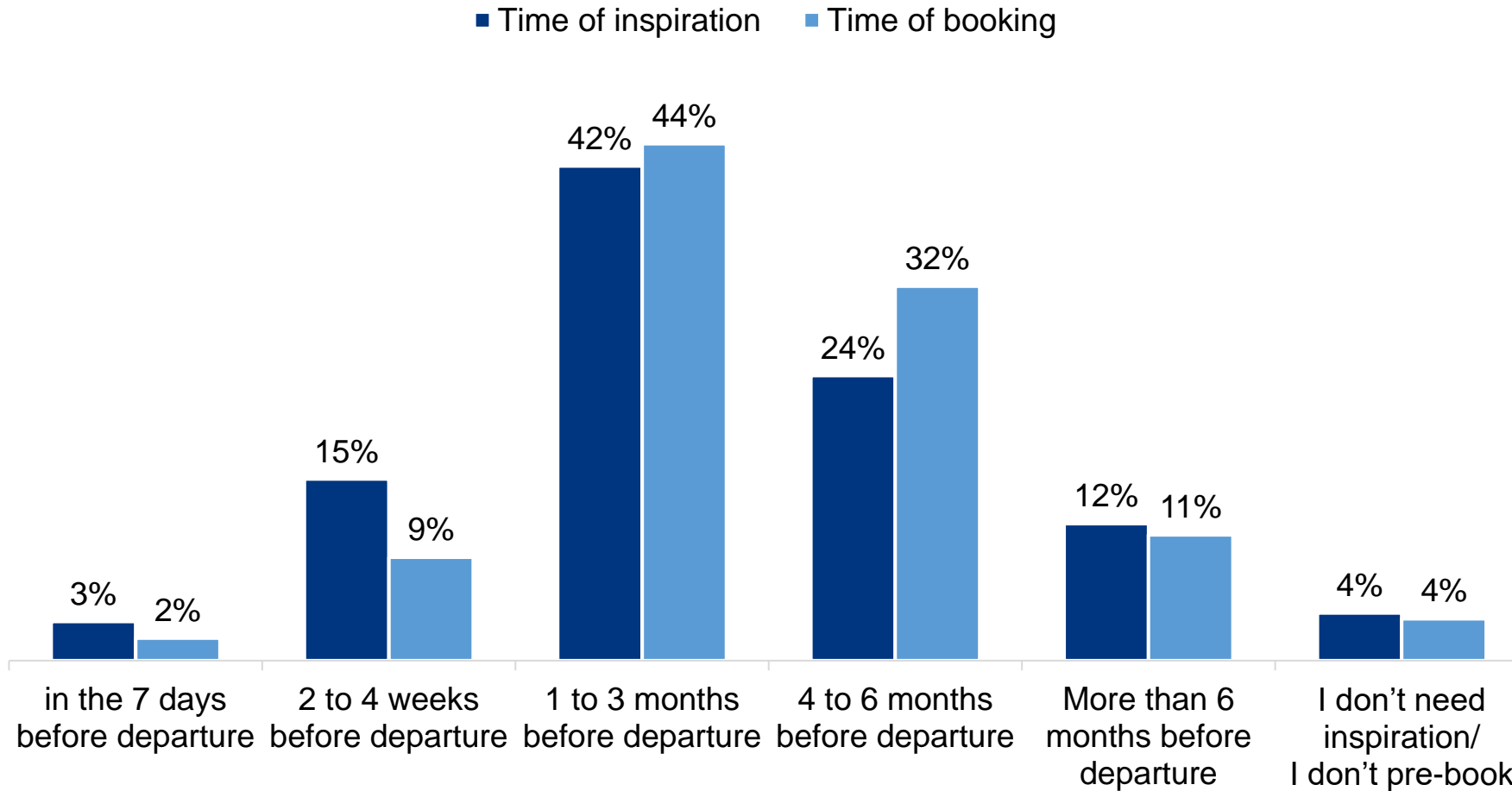
Inspiration and information: Search engines, travel guide books, online booking platforms are most popular



- » Search engines like Google are the most popular source for planning the trip to Finland.
- » It is followed by travel guides/literature and online booking platforms.
- » In general a mix of digital and traditional channels seems to be needed to address the potential guests to Finland during the planning of a future trip to Finland.
- » Only 4-6% of the Finland Potential would like to use Facebook, TikTok, Podcasts or Movies/TV series as a source of inspiration and information.

F11a: Which of these sources would you like to use to plan your trip to Finland?
 Basis: Finland Potential 2024-2026 (n= 718);
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT

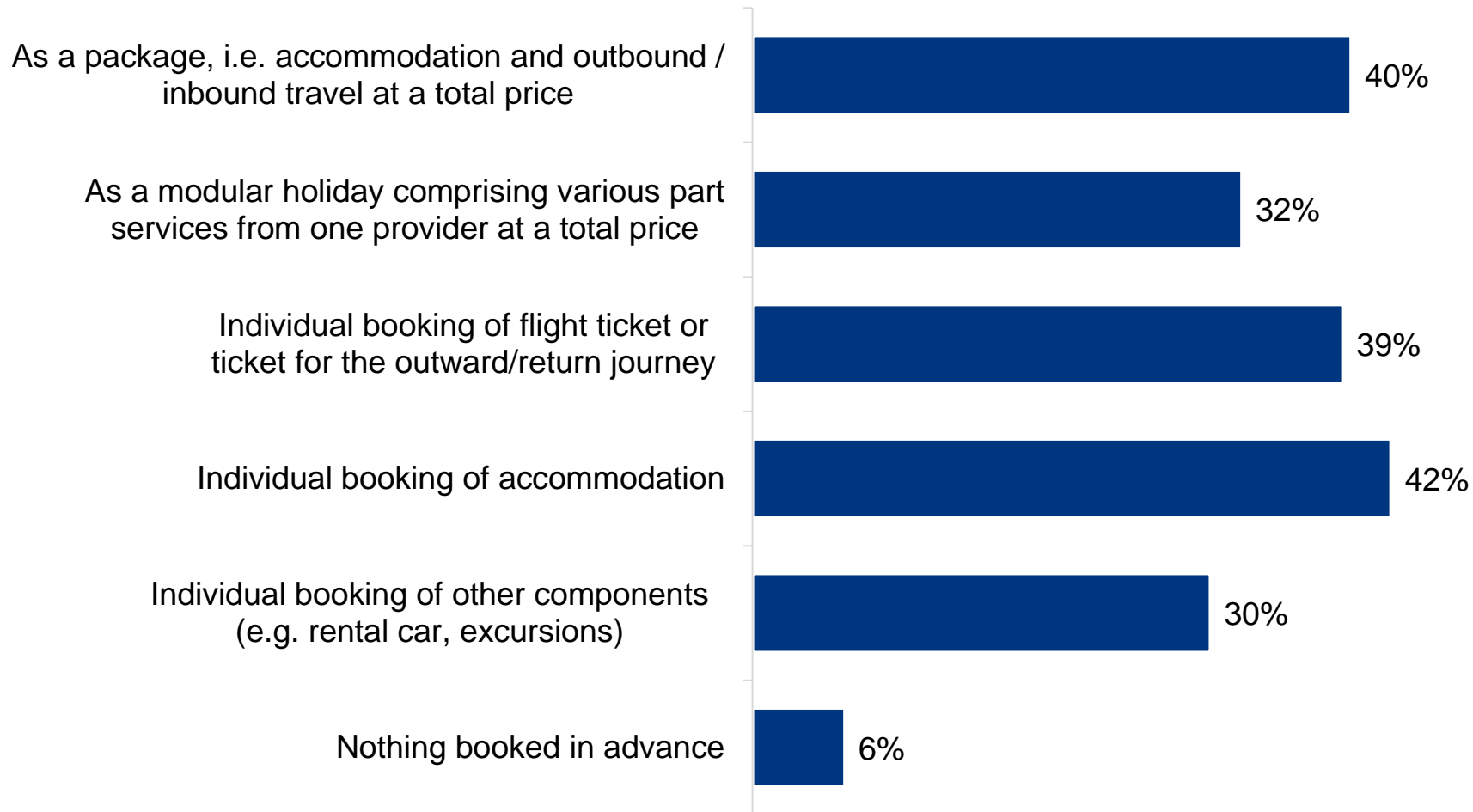
Time of inspiration and booking of a summer holiday to Finland: Mostly 1-3 and 4-6 months in advance



- » 12% of the potential guests to Finland would start looking for inspiration and 11% would already book their summer holiday more than 6 months before departure.
- » The most people would look for inspiration (42%) and book the holiday trip (44%) 1 to 3 months before departure.

F12Aa and F12Ba: You have just said that you would like to travel to Finland in the summer. How long before you leave would you like to look for inspiration for your summer holiday to Finland?; How long before departure would you like to book your summer holiday to Finland?
Basis: Finland Potential in summer 2024-2026 (n= 424); Source: Finland Ad-hoc-survey 2024 by FUR/NIT

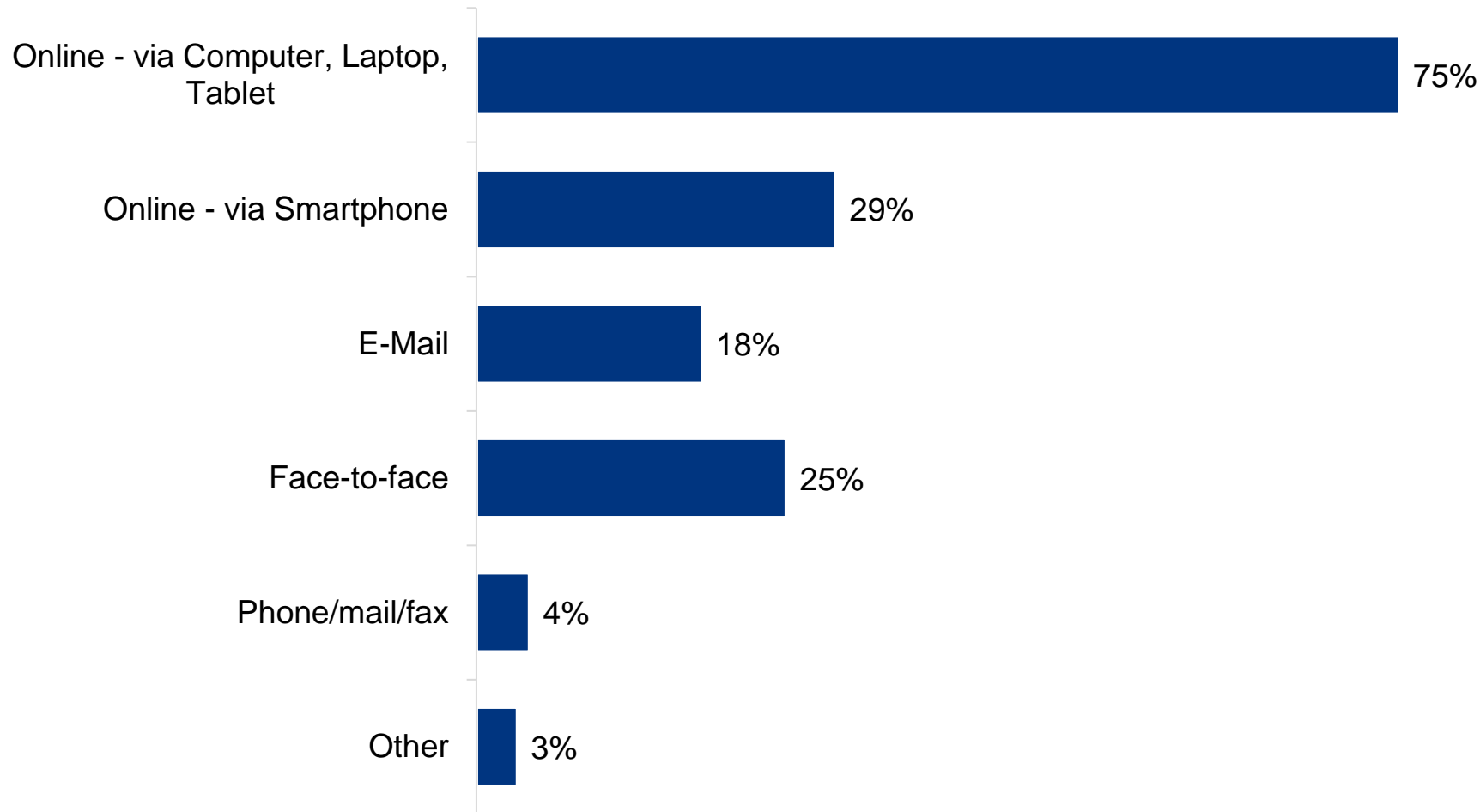
Holiday organisation: 42% would book the accommodation individual, 40% are interested in booking a package holiday



- » About 40% of the potential guests to Finland prefer to organize their holiday to Finland by booking accommodation and/or the flight ticket individually or as a package holiday.
- » One third are interested in a modular holiday.
- » 6% wouldn't book in advance.

F13a: How would you like to organise your holiday to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

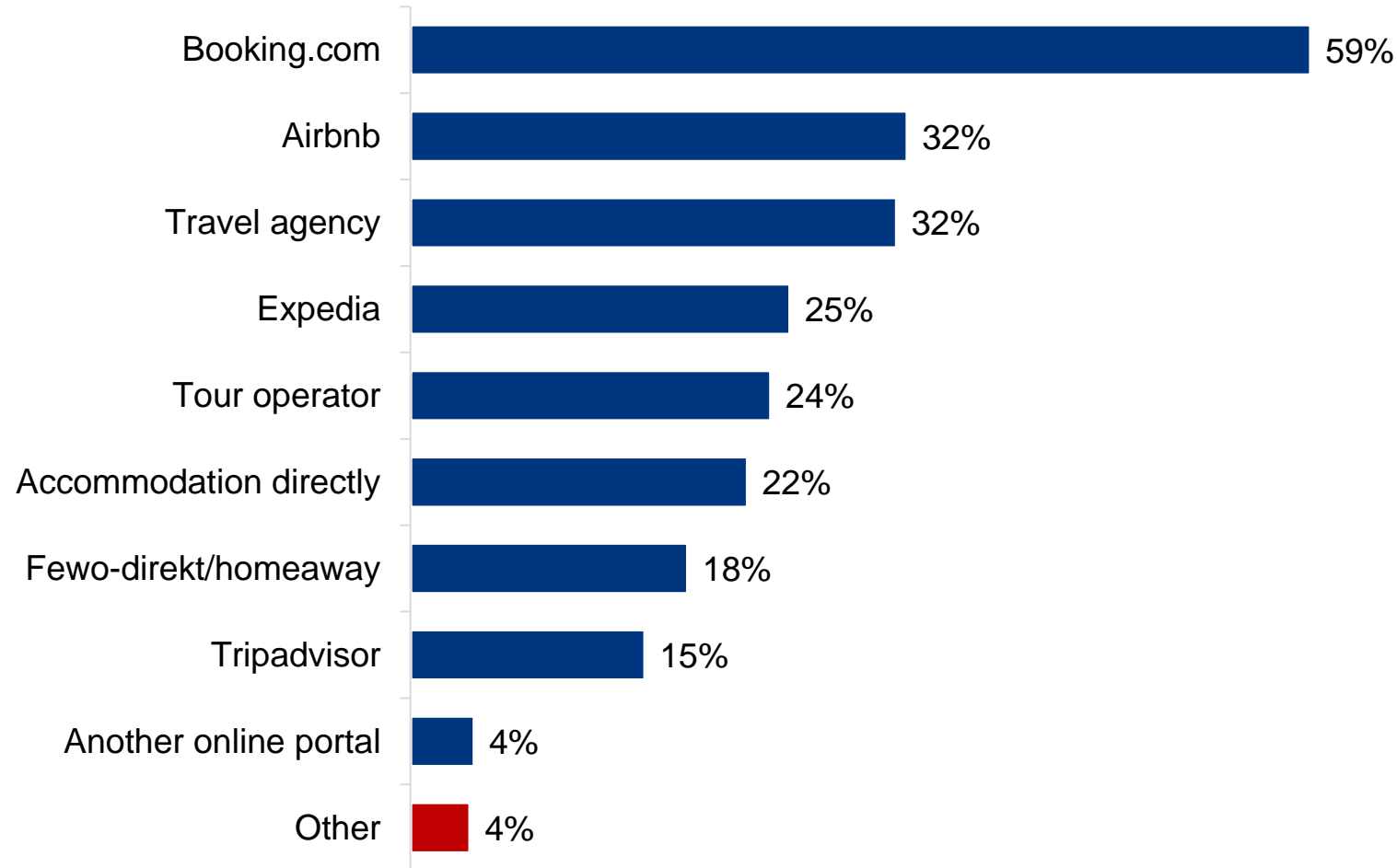
Booking channels: High interest in online booking, a quarter are interested in booking in person



- » Most people would like to book the holiday trip online. 75% would use a computer, laptop or tablet and 29% would also book the trip via smartphone.
- » One quarter of the potential guests to Finland are interested in booking face-to-face and 18% via E-Mail.
- » *Attention: With these kinds of questions in an online survey there might be a certain bias in favour of online channels and in disfavour of traditional channels due to the mode of the survey.*

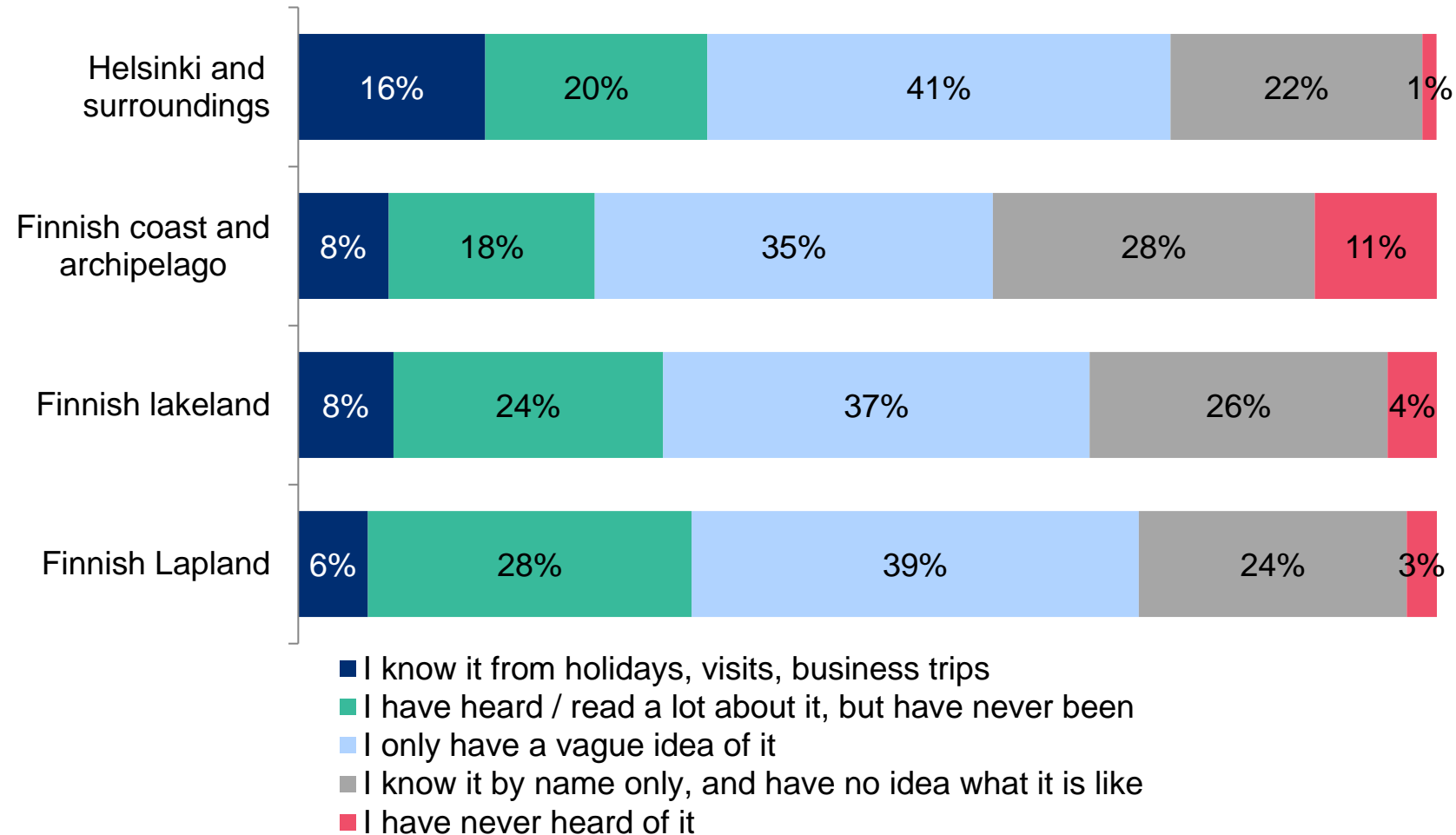
F14a: How would you like to book your holiday to Finland?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Place of booking: Booking.com is by far the most popular booking option, followed by Airbnb and travel agencies



- » Here we are looking at booking preferences for future trips to Finland.
- » Booking.com is the most preferred booking channel. 59% of the potential guests to Finland would book their holiday via Booking.com.
- » Then, in the overall ranking we see a mix of traditional and online channels: Airbnb and travel agencies with 32%, Expedia with 25%, tour operator with 24% and accommodation directly with 22%.
- » *Attention: Please see comment on previous slide which is also applicable here.*

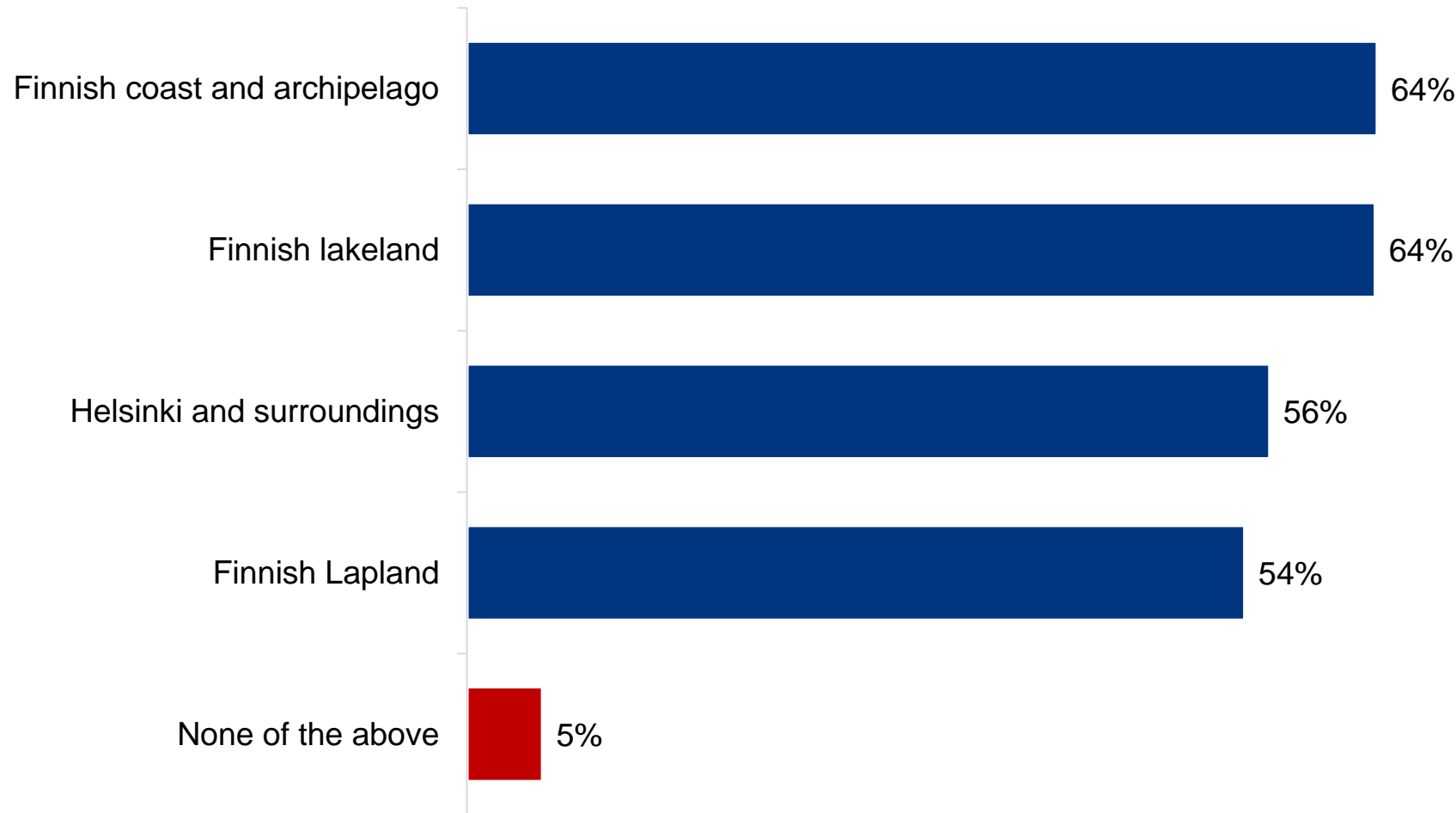
Awareness of Finnish Destinations: Helsinki & surroundings are well known, 11% have not heard of the Finnish archipelago



- » These results show a detailed picture on how well the potential guests to Finland know the different holiday destinations in Finland.
- » 16% have been in Helsinki or the surrounding area in the past and only 1% have never heard of it. This region is far better known than e.g. the Finnish coast and archipelago. 28% know it by name only and 11% have never heard of it.
- » Around a quarter have heard and read about the Finnish Lakeland (24%) and Lapland (28%), but only 6-8% of Germans have visited them in the past.

F16A: How well do you know the following regions?
 Basis: Finland Potential 2024-2026 (n= 718);
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT

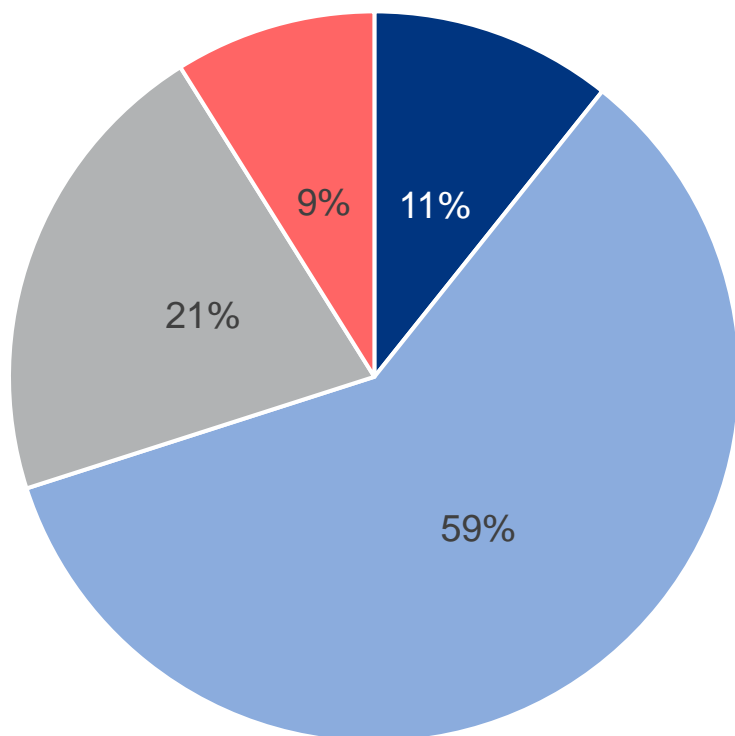
Interest in Finnish Destinations: Two thirds are interested in a holiday on the Finnish coast/archipelago and in the lakeland



- » Even though 11% of the potential guests to Finland have never heard about the Finnish coast and archipelago, 64% would like to go there on a holiday in the next three years.
- » Also 64% are interested in visiting the Finnish lakeland.
- » 56% and 54% can imagine visiting Helsinki and the surrounding area or Finnish Lapland.

F16B: In which of the following regions would you like to go on holiday in the next three years?
Basis: Finland Potential 2024-2026 (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Sustainability: For 70 %, sustainability is a factor in the decision to travel to Finland

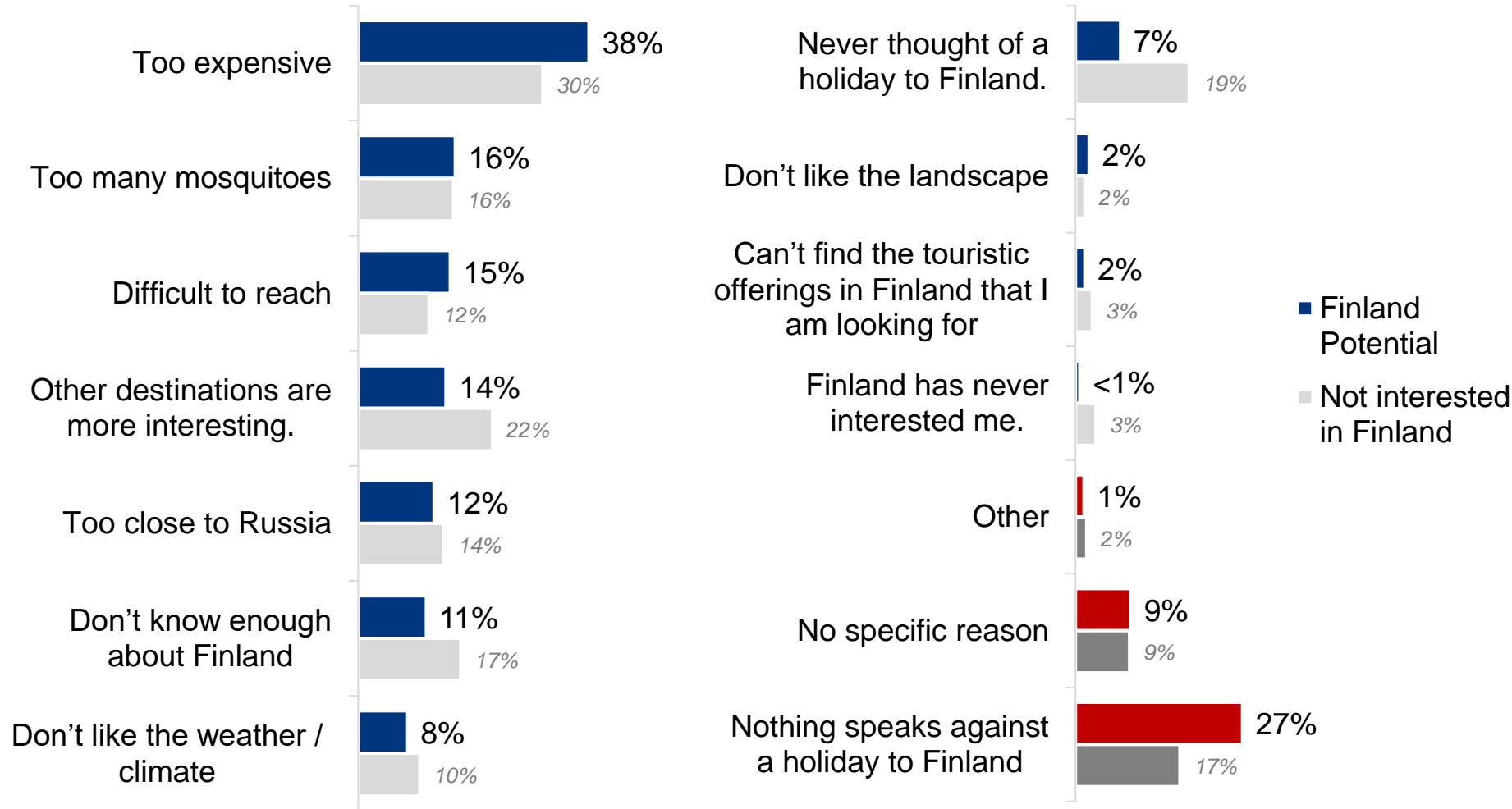


- Sustainability will be the decisive factor in deciding between otherwise equivalent offers.
- Sustainability will be – among other things – an aspect in the decision for this trip.
- Sustainability aspects will have no significance in the decision for this trip.
- I am generally not interested in sustainable travel.

- » The figure shows the importance of sustainability when going on a holiday trip to Finland.
- » For 11%, sustainability will be the decisive factor when deciding between otherwise equivalent offers.
- » A further 60% say that sustainability will be among other things an aspect in the decision for this trip.
- » 9% of the potential Finland guests are generally not interested in sustainable travel.

F17: Now the focus is on sustainability in holiday travel, i.e. how ecologically compatible, resource-saving, environmentally friendly and socially acceptable the holiday should be. If you think about a future holiday trip to Finland: Which of the following statements applies?
Basis: Finland Potential (n= 718); Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Finland-Barriers: the main reason for not travelling to Finland is that it is too expensive



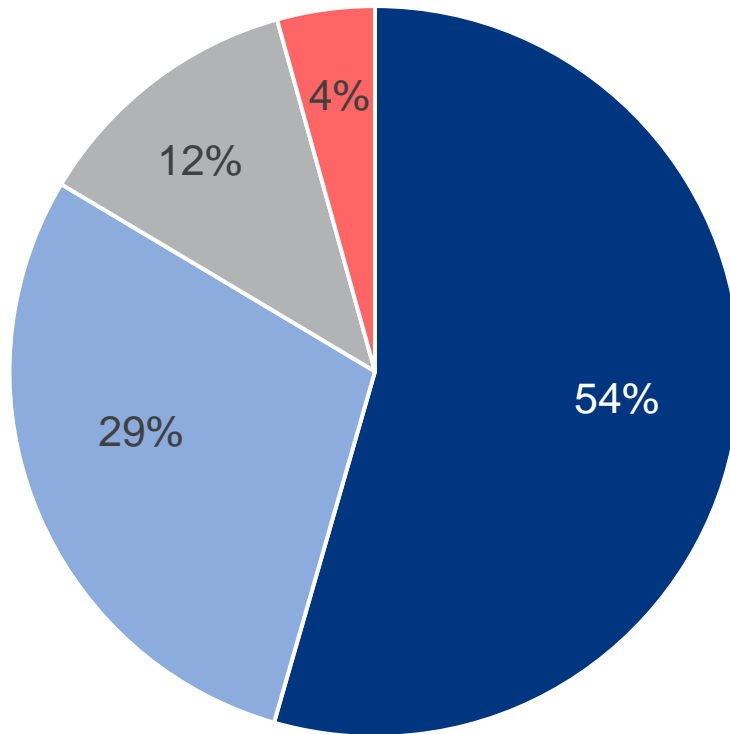
- » This question is dealing with possible reasons against travelling to Finland.
- » 27% of the potential guests to Finland think that nothing speaks against a holiday to Finland and 9% see no specific reason.
- » Most important reasons against travelling to Finland are the high costs, the amount of mosquitos, the difficulties to reach Finland and that other destinations are more interesting.
- » The ranking is quite similar between potential guests to Finland and those not interested to travel to Finland.

F18: What speaks against a holiday in Finland from your point of view?
 Basis: Finland Potential 2024-2026 (n= 718); Not interested in Finland (n= 328);
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT

A woman with long dark hair, wearing a colorful striped sleeveless top and light-colored pants, is sitting on a wooden dock. She is facing away from the camera, looking out over a large body of water towards a sunset. The sun is low on the horizon, creating a warm, golden glow and reflecting off the water's surface. In the foreground, an open book and a small orange and white mug are placed on the wooden planks of the dock. The background shows a calm lake with some dark rocks on the right side and a forested hill in the distance under a soft sky.

7. Deep-dive 2: Visit Finland Segments

Visit-Finland-Segments: More than 50% of the potential guest to Finland agree to the 'nature lover' segment statement



■ 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

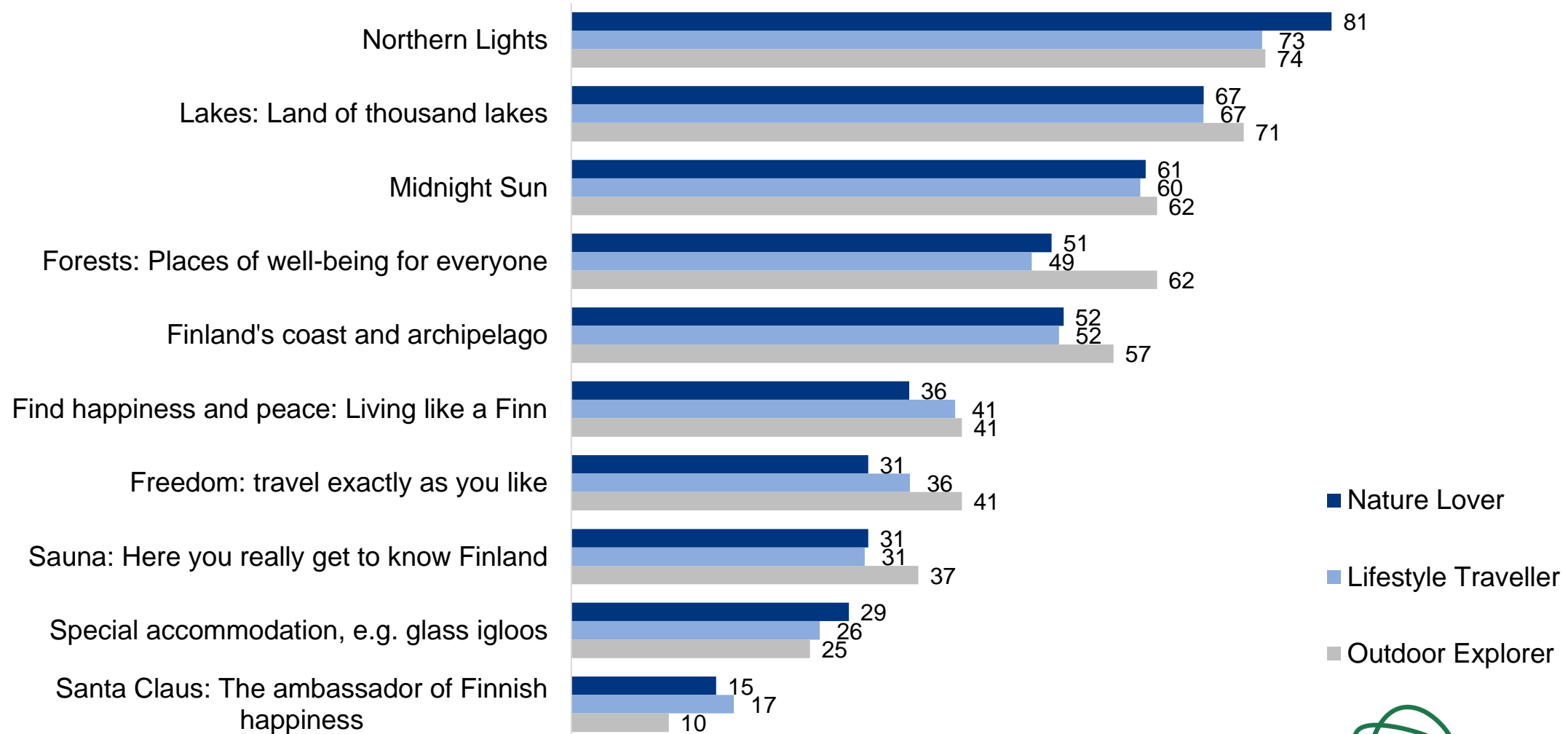
"Nature is not a place to visit, it is home. The great outdoors offers endless opportunities to challenge ourselves and to push our limits. Whether it's running, hiking, or biking, these activities allow us to connect with nature."

■ None

- » With this question, we identify the relevant Visit-Finland-Segments on the German market by asking the respondents to relate to three different statements.
- » More than 50% of potential guests to Finland in Germany are of the opinion that the statement connected with the segment 'Nature Lover' best applies to them personally.
- » 29% stated that the 'Lifestyle Traveller' segment suits them best and 12% prefer the 'Outdoor Explorer' Segment.
- » For 4%, none of the three segments applied to them personally.

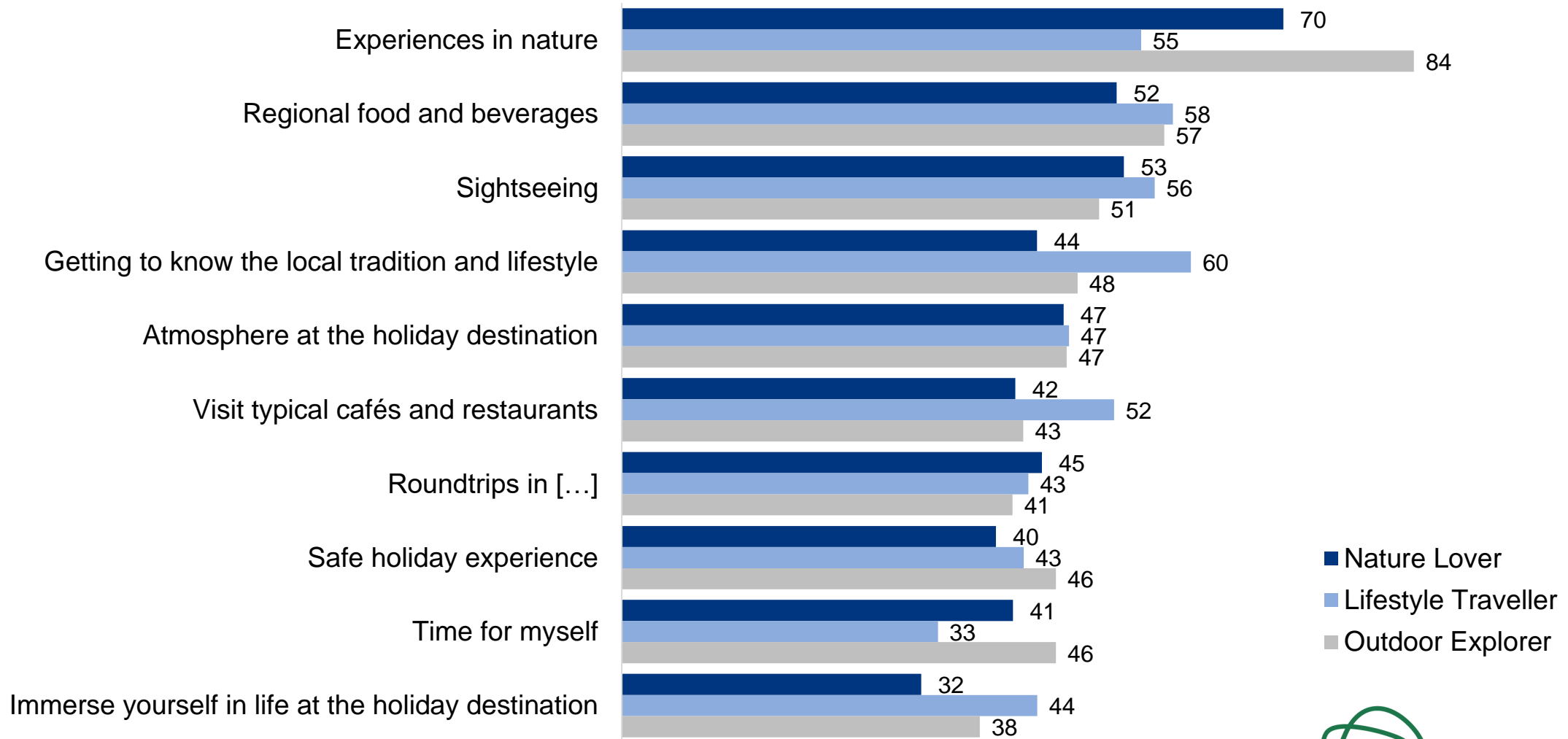
F1: When you think of traveling to Scandinavia, which of the following statements best applies to you personally?
Basis: Finland Potential (n= 718);
Source: Finland Ad-hoc-survey 2024 by FUR/NIT

Visit-Finland-Segments: Highlights of Finland



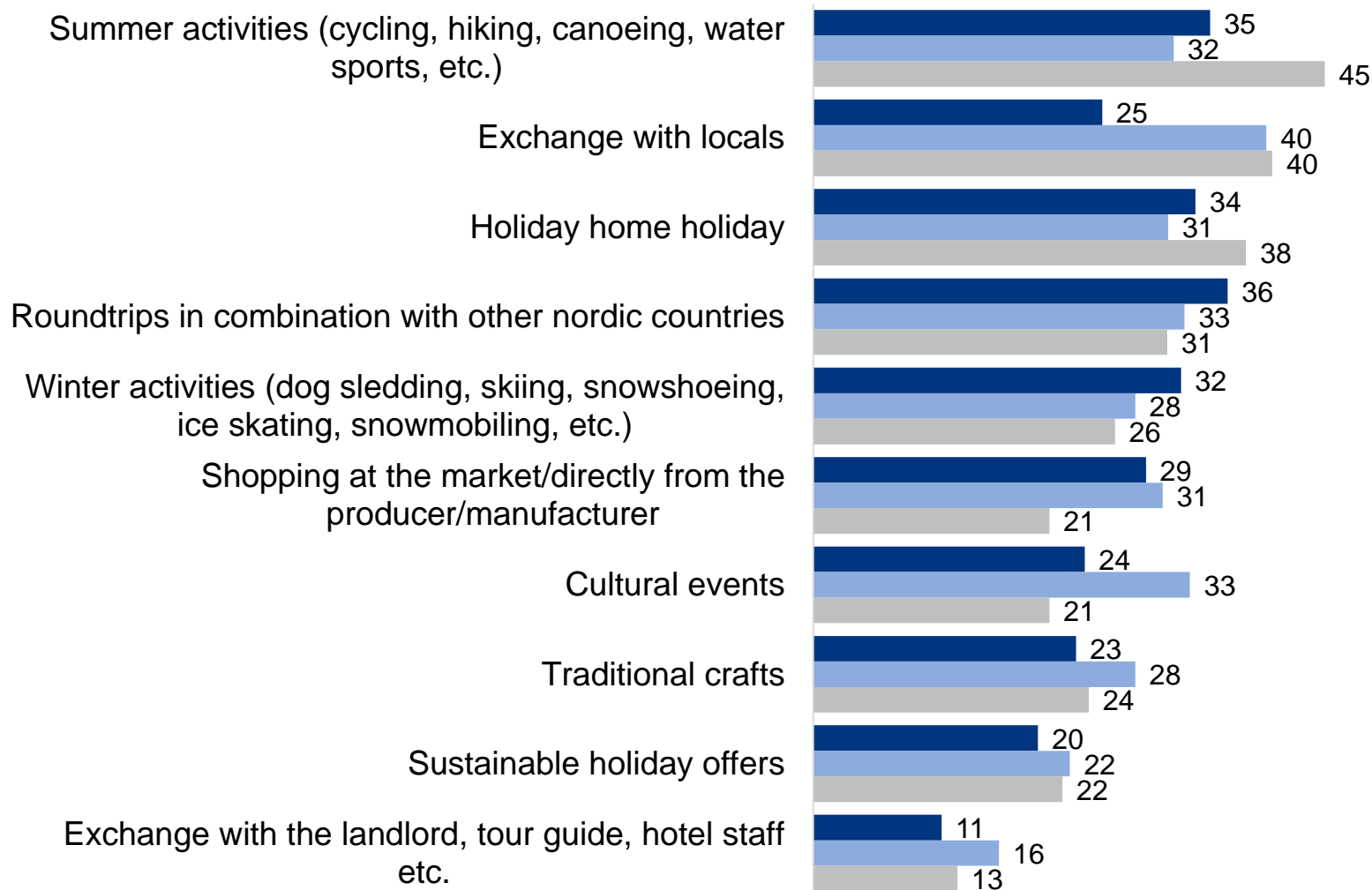
F2: What do you think are the special highlights of Finland as a holiday destination? Please select all answers that are applicable; in %
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87)
 Source: Finland Ad-hoc-survey 2024; RA *online* 11/2020

Visit-Finland-Segments: Like to experience in Finland Top 10



F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87)
 Source: Finland Ad-hoc-survey 2024; RA *online* 11/2020

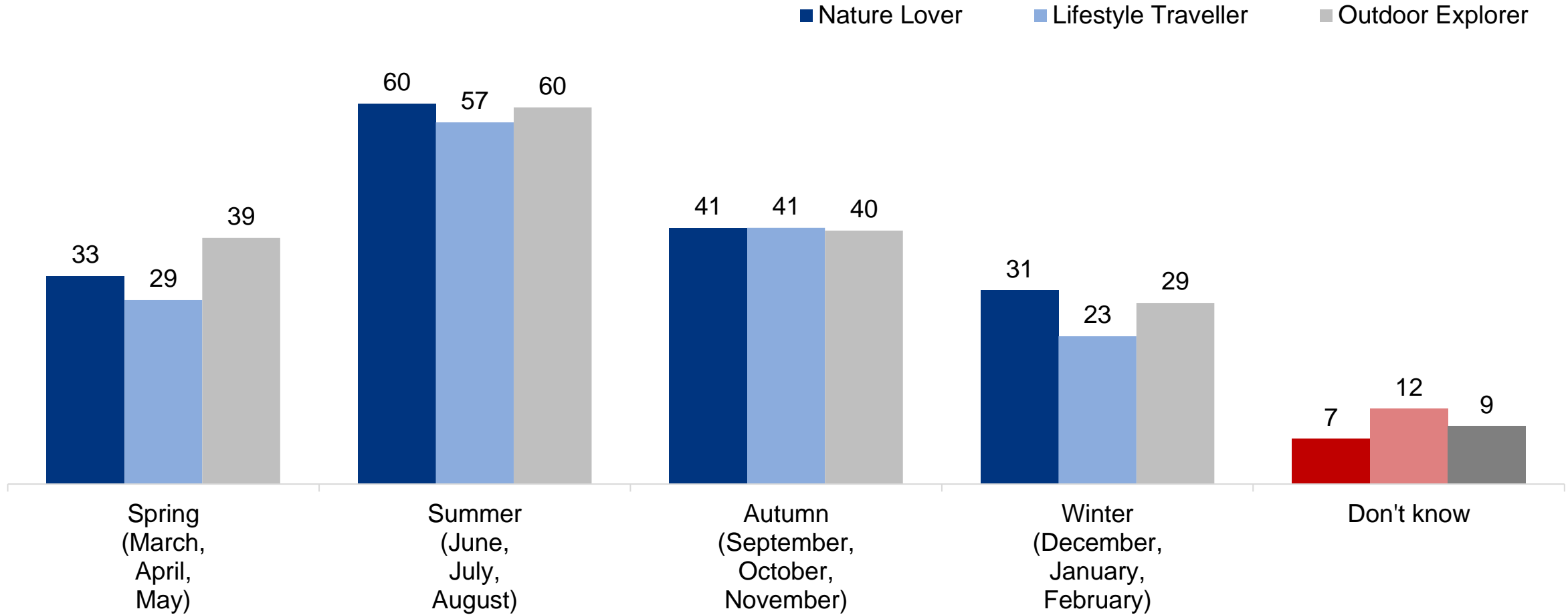
Visit-Finland-Segments: Like to experience in Finland Top 11-20



- Nature Lover
- Lifestyle Traveller
- Outdoor Explorer

F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87)
 Source: Finland Ad-hoc-survey 2024; RA *online* 11/2020

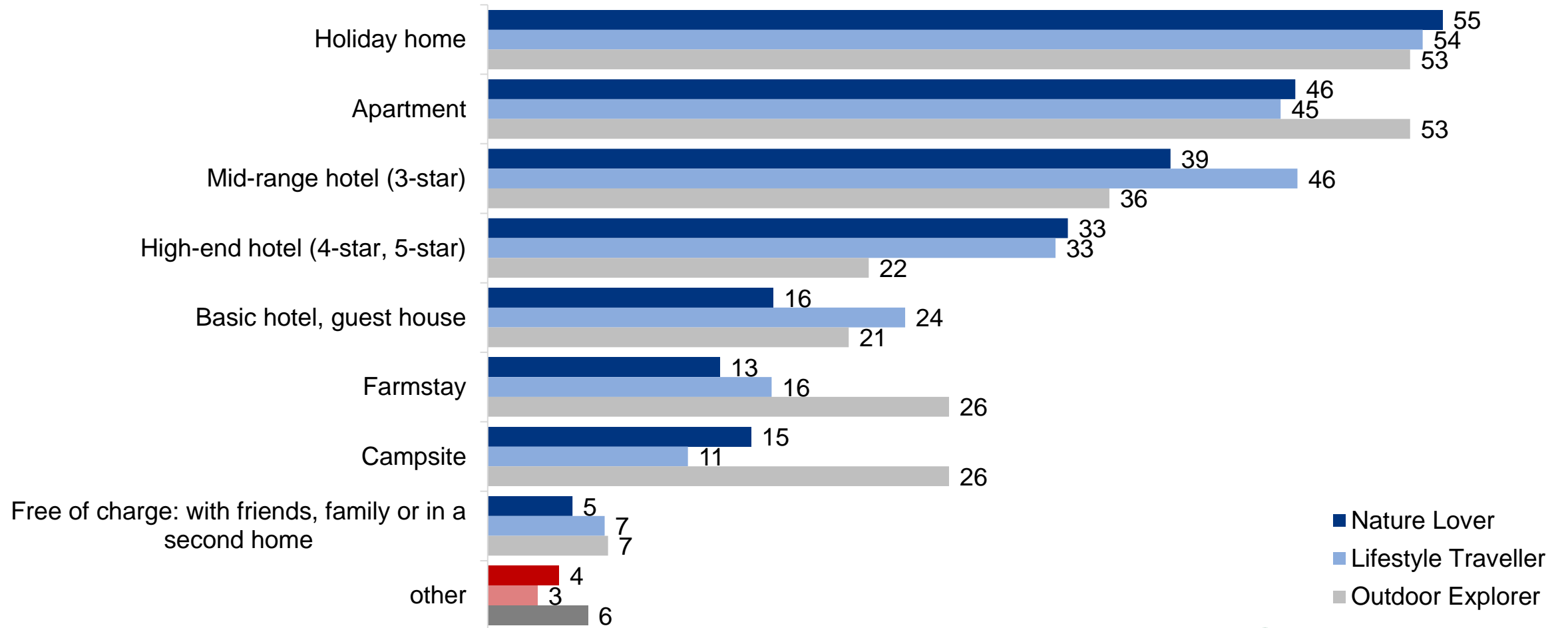
Visit-Finland-Segments: Preferred season to visit Finland



F4a: At what time of the year would you like to travel to Finland?
Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

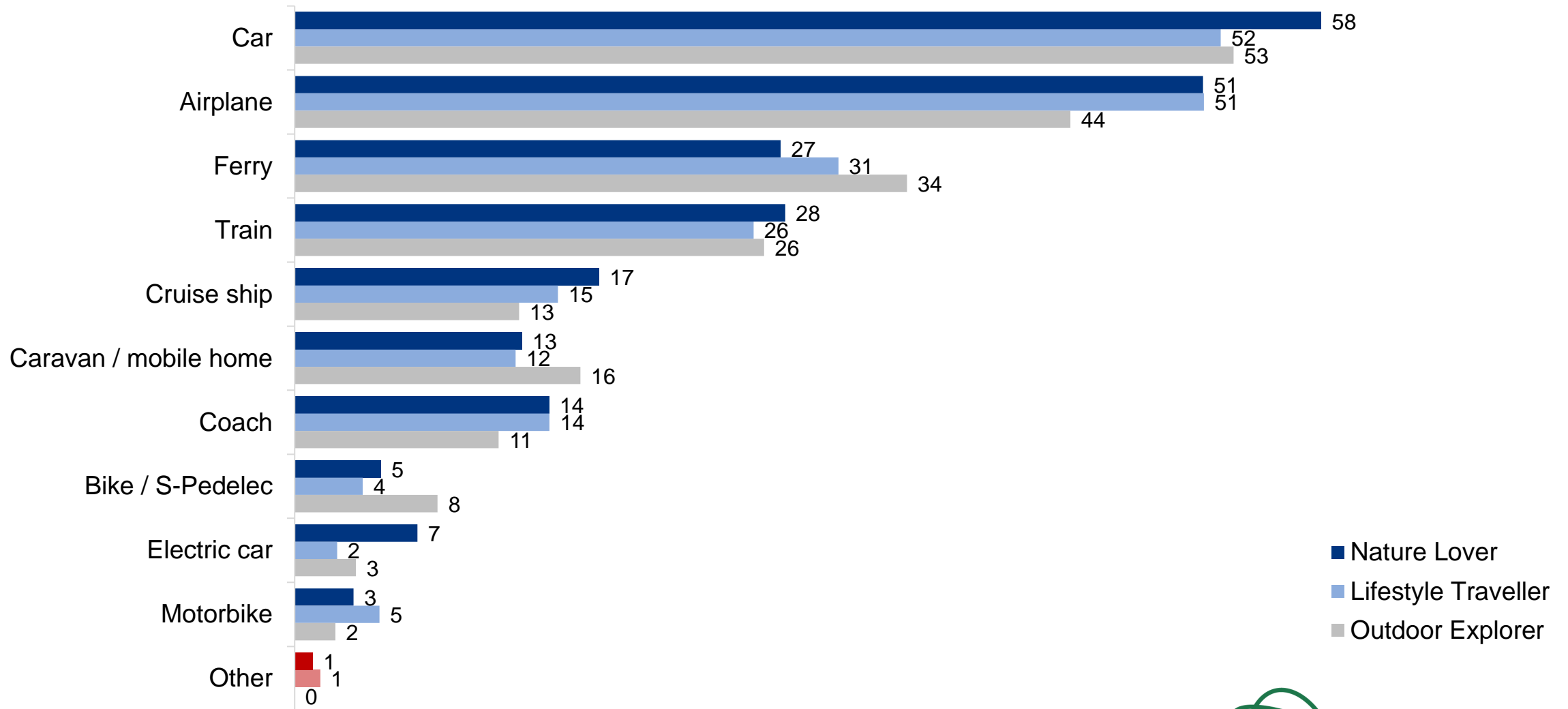
Preferred type of accommodation in Finland



F5a: Which type of accommodation would you probably choose for a holiday to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

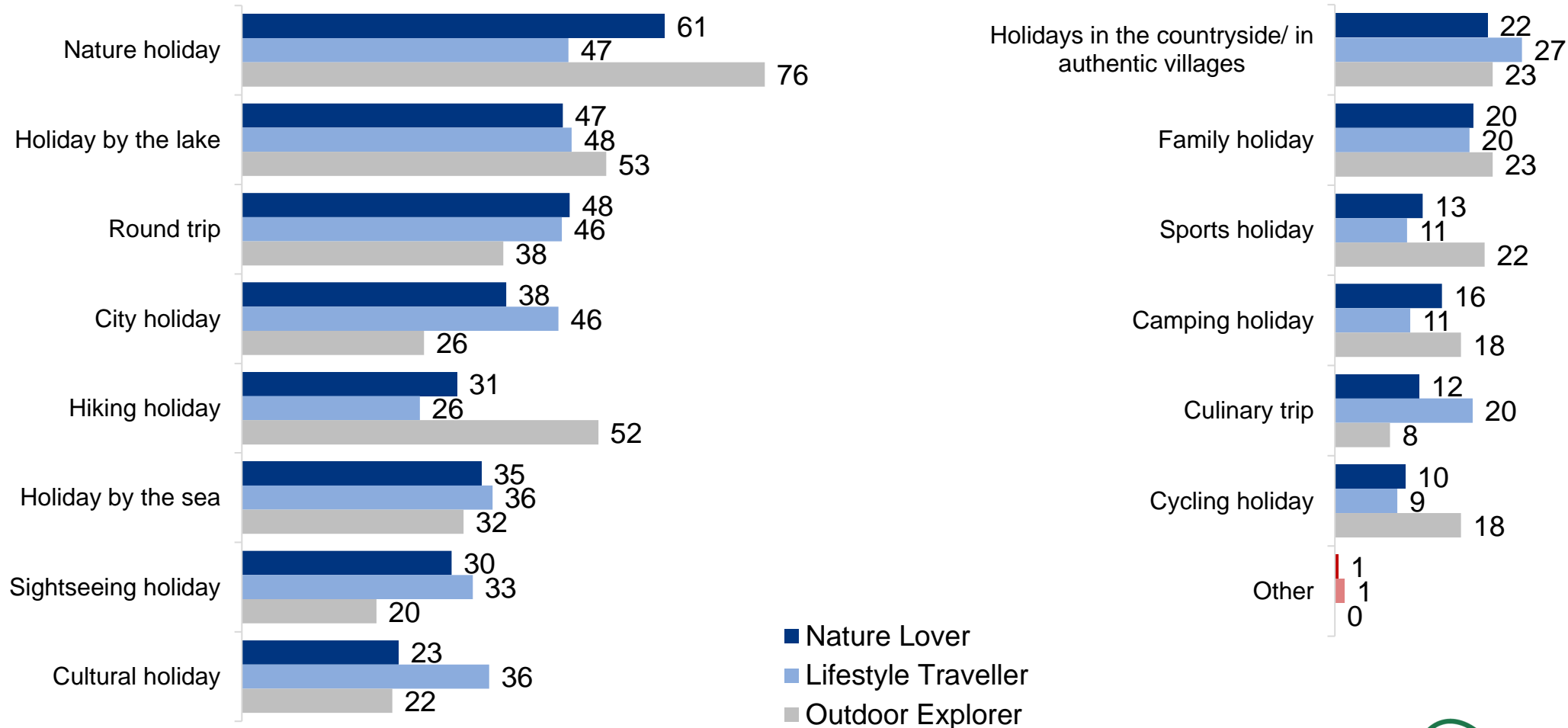
Preferred mode of transport to Finland



F6a: Which mode of transport would you probably choose for a holiday to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

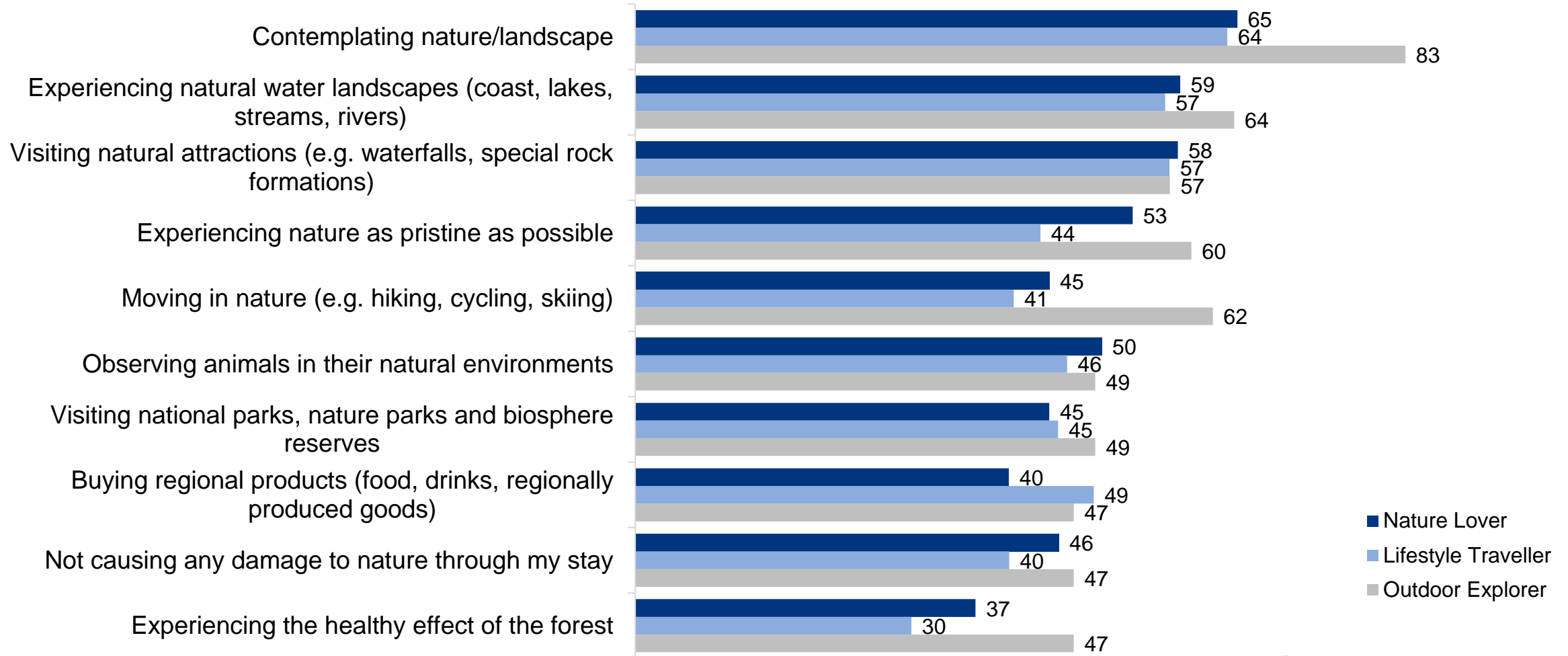
Visit-Finland-Segments:

Preferred type of holiday in Finland



F7a: Which type of holiday would you like to spend in Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

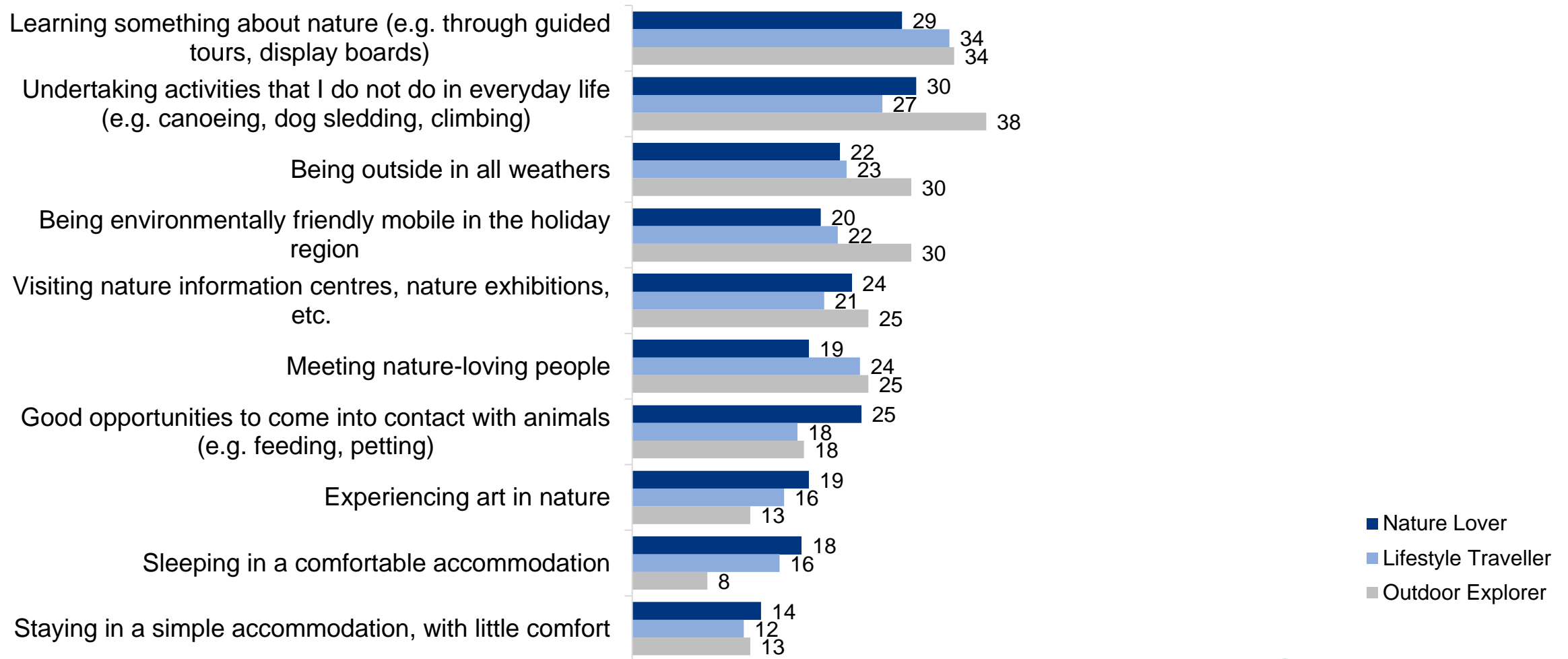
Visit-Finland-Segments: Preferred nature experience in Finland Top 10



F8a: What is particularly important to you when experiencing nature on future holiday trips to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

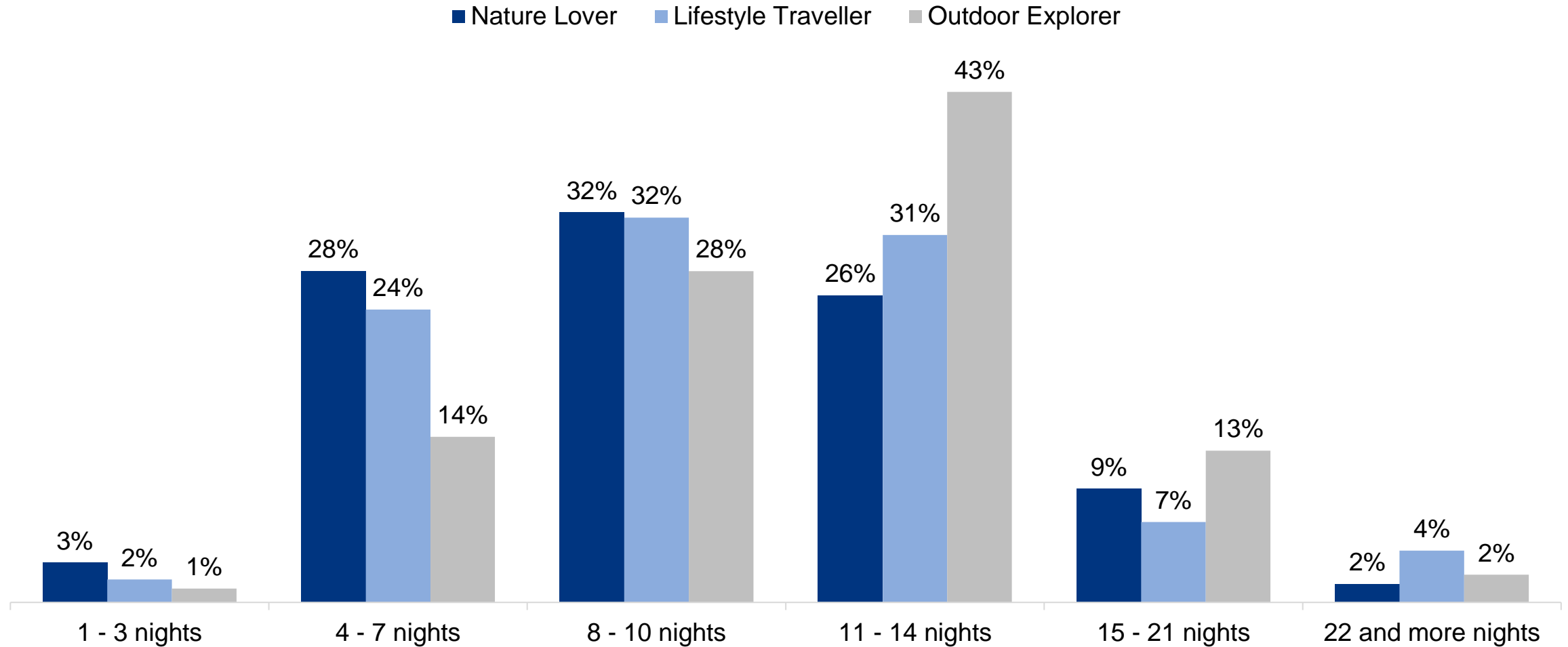
Preferred nature experience in Finland Top 11-20



F8a: What is particularly important to you when experiencing nature on future holiday trips to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

Preferred duration of trip to Finland



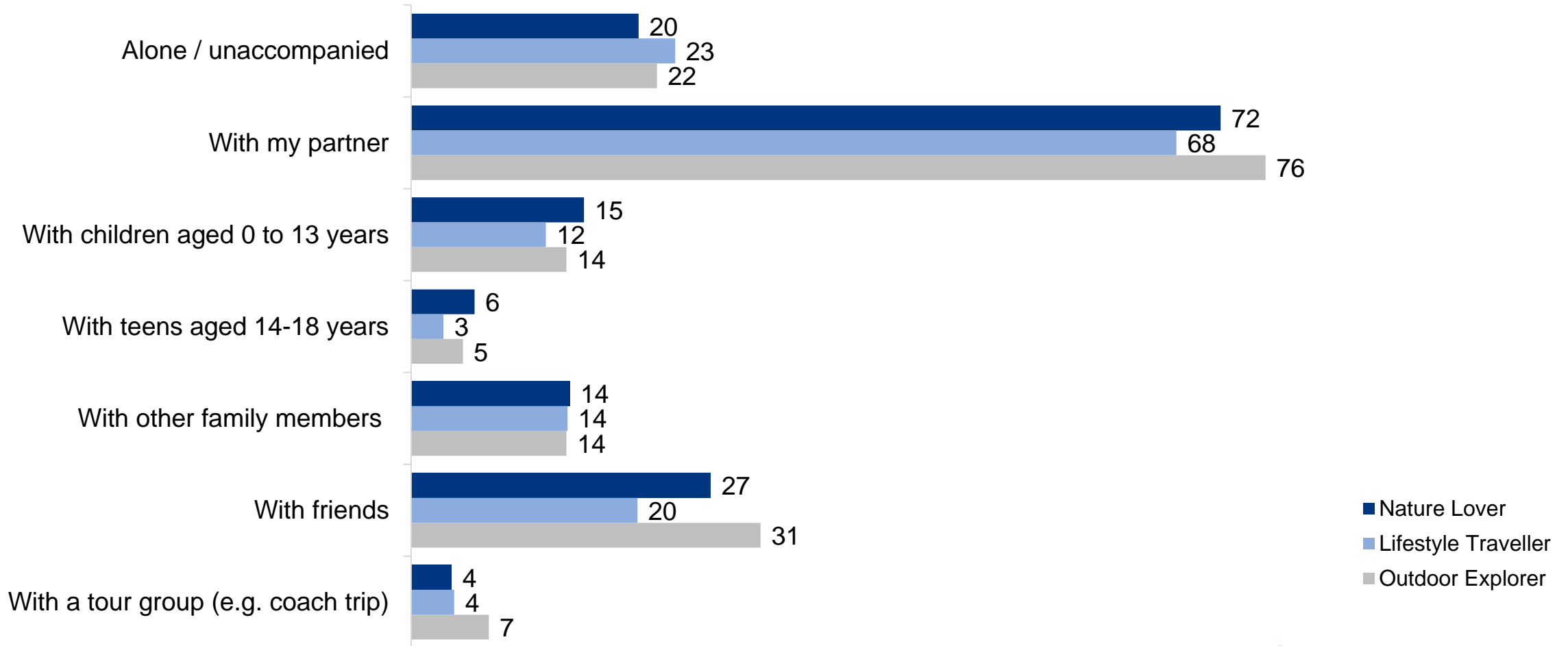
F9a: How long would you like to stay in Finland for your next holiday?

Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87)

Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

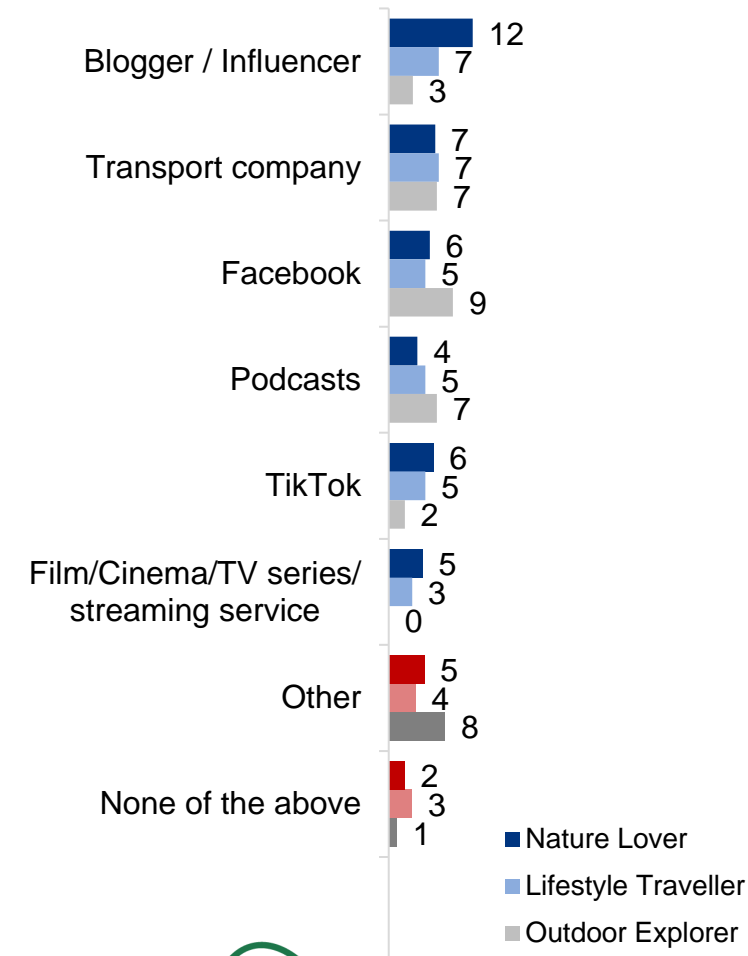
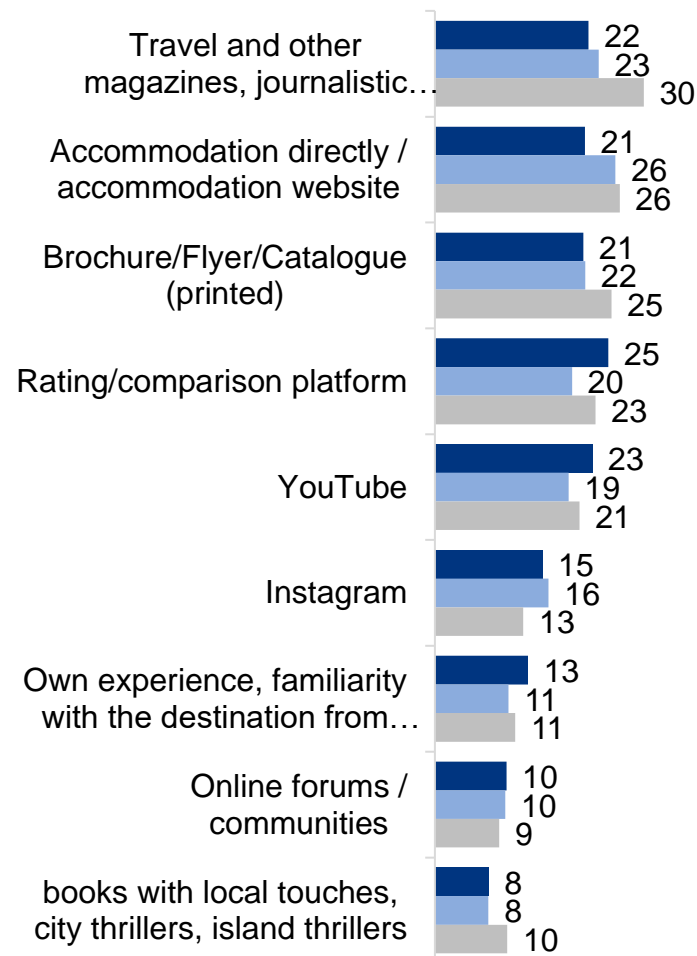
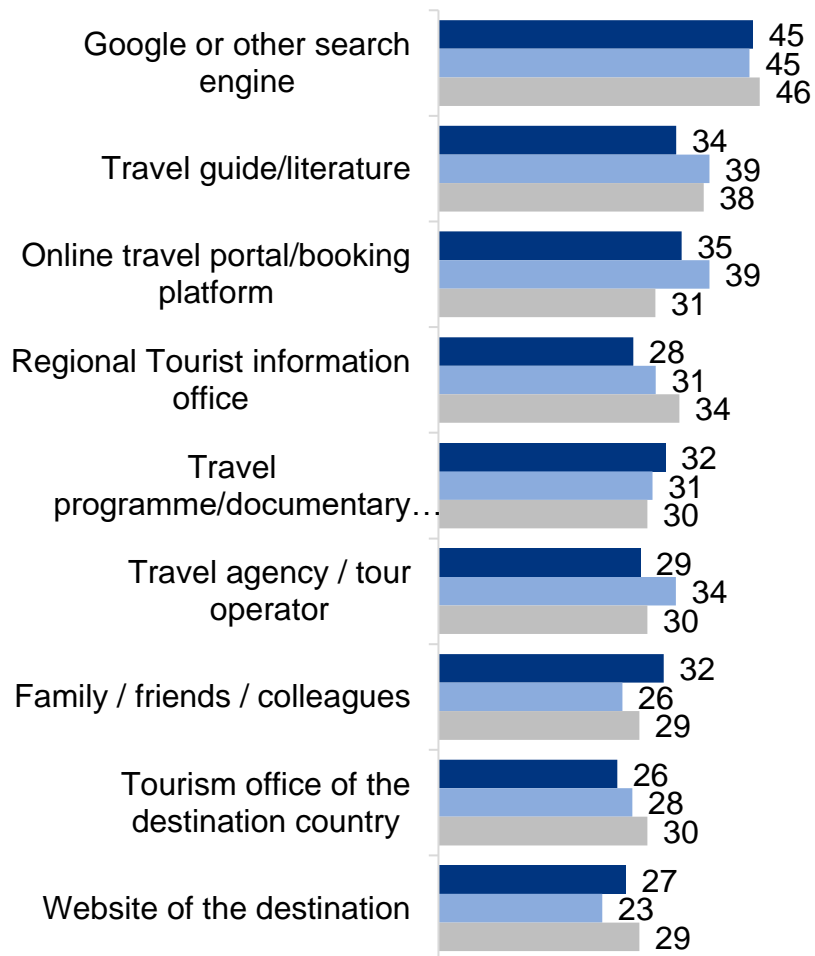
Preferred travel companions during trip to Finland



F10a: With whom would you like to make a future trip to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

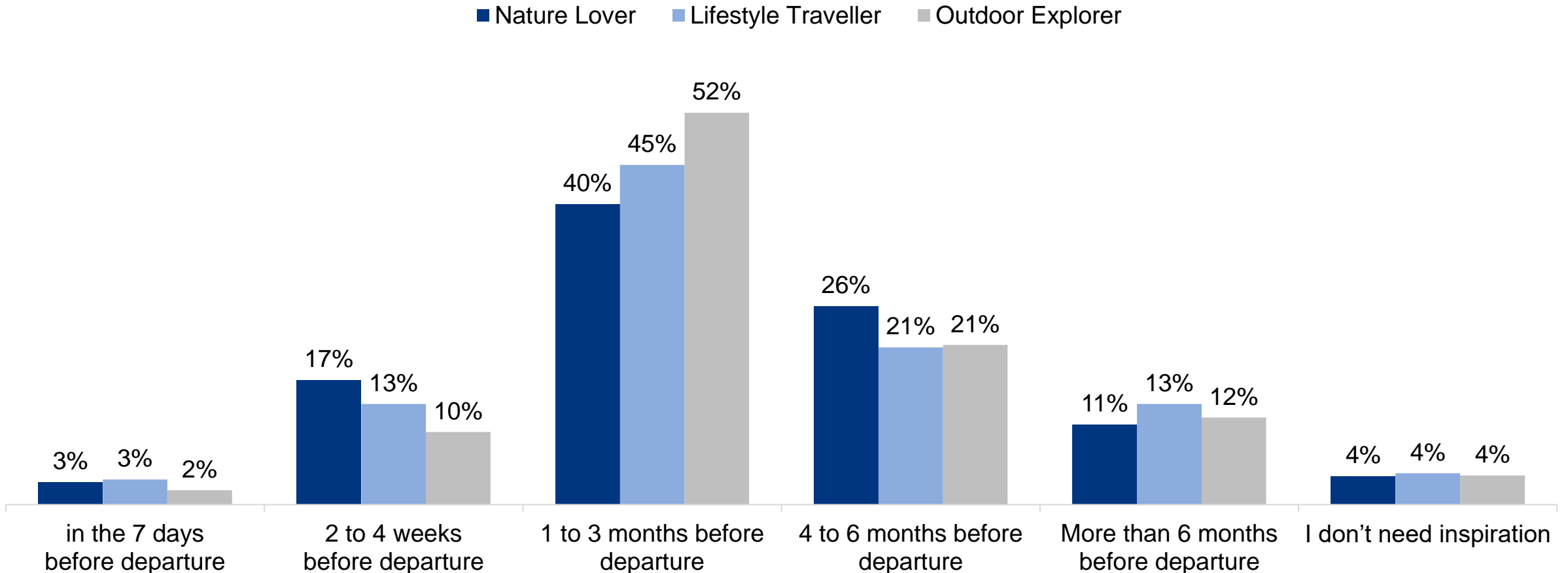
Preferred information sources to plan a trip to Finland



F11a: Which of these sources would you like to use to plan your trip to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

Preferred time of inspiration of summer holiday to Finland



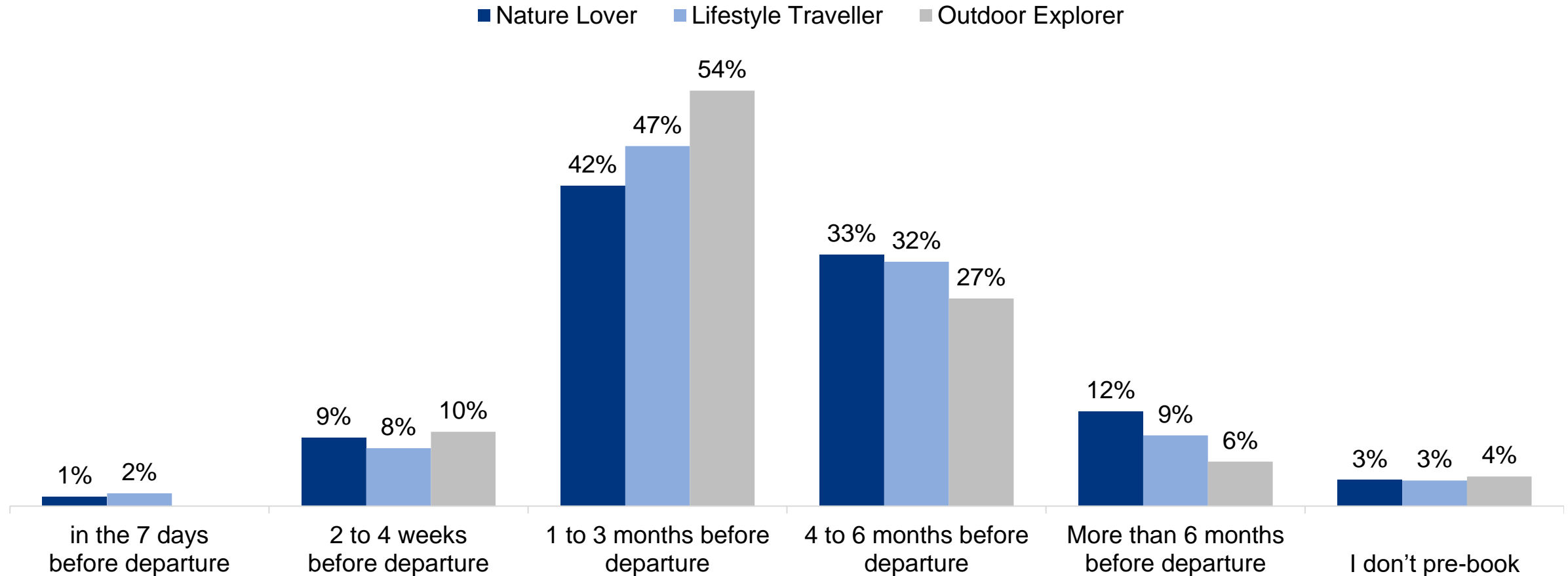
F12Aa: You have just said that you would like to travel to Finland in the summer. How long before you leave would you like to look for inspiration for your summer holiday to Finland?;

Basis: Finland Potential in summer 2024-2026 (n= 424); Nature Lover (n= 236); Lifestyle Traveller (n= 120); Outdoor Explorer (n= 52);

Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

Preferred time of booking of summer holiday to Finland



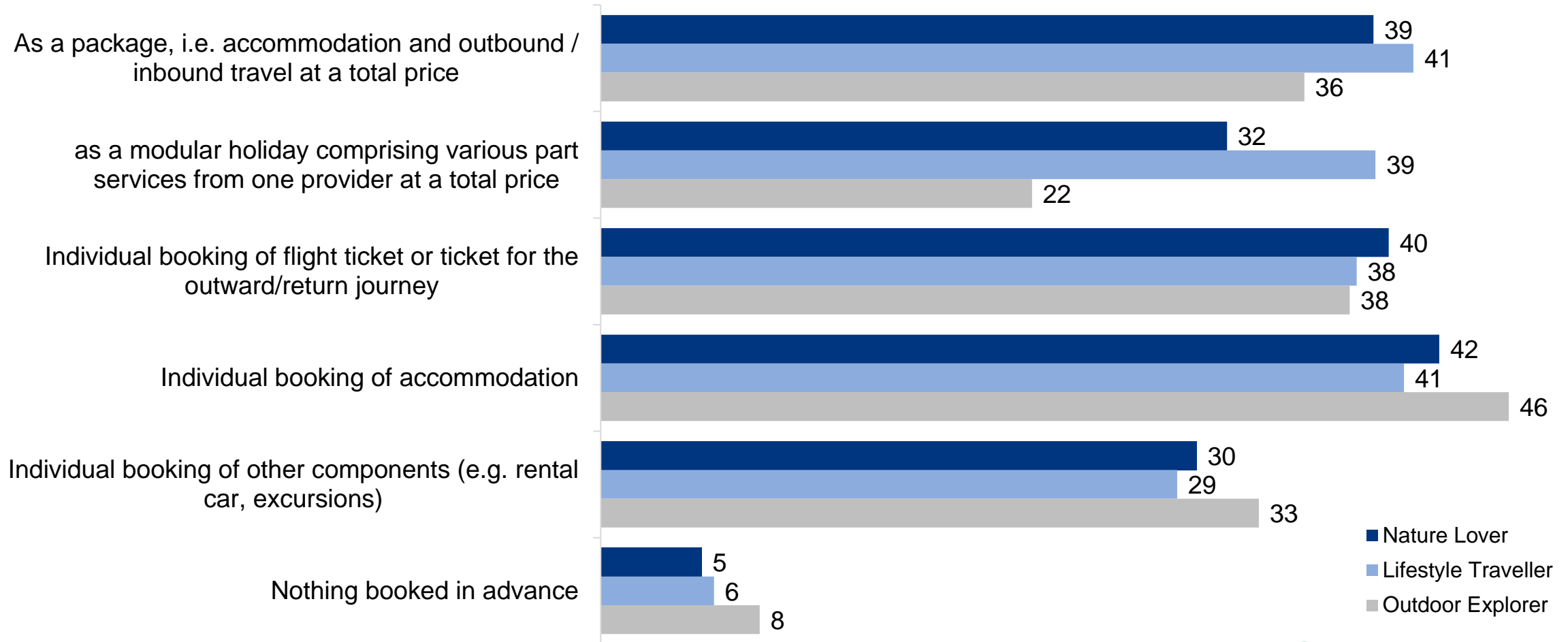
F12Ba: You have just said that you would like to travel to Finland in the summer. How long before departure would you like to book your summer holiday to Finland?

Basis: Finland Potential in summer 2024-2026 (n= 424); Nature Lover (n= 236); Lifestyle Traveller (n= 120); Outdoor Explorer (n= 52);

Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

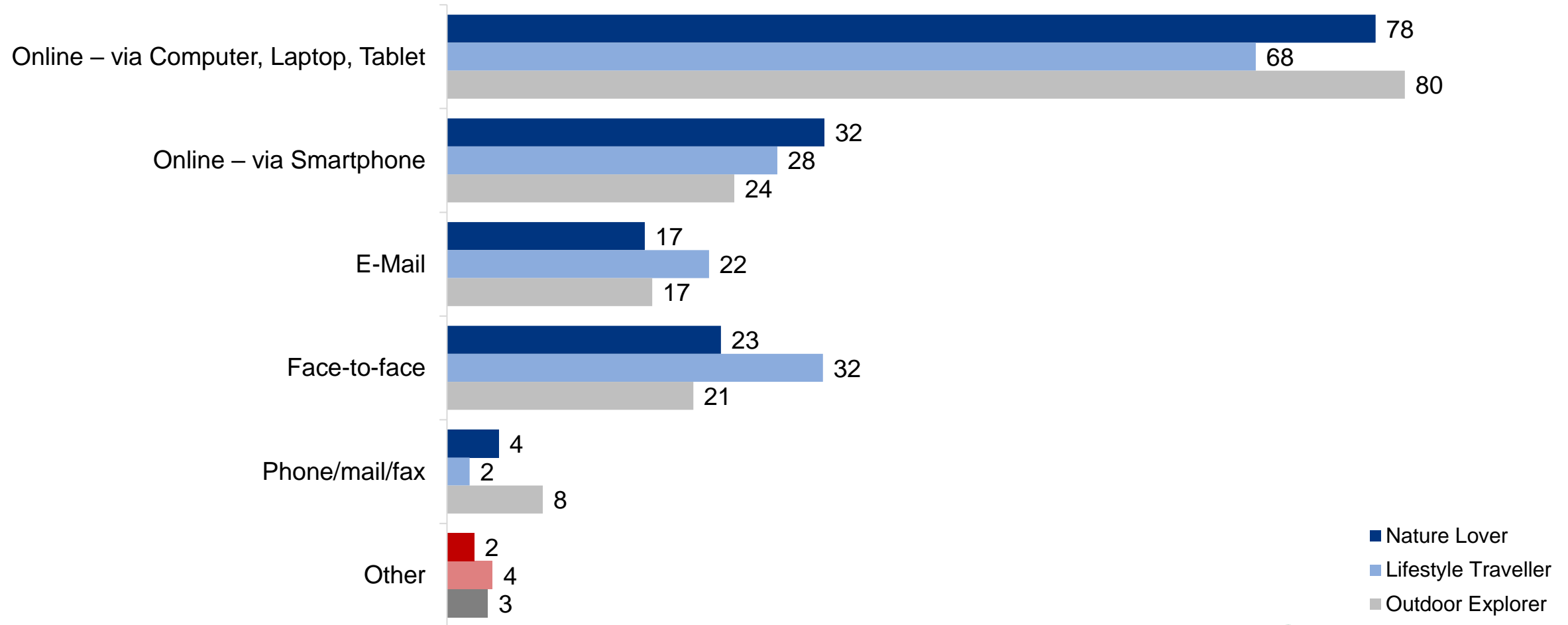
Preferred organisation of holiday to Finland



F13a: How would you like to organise your holiday to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments:

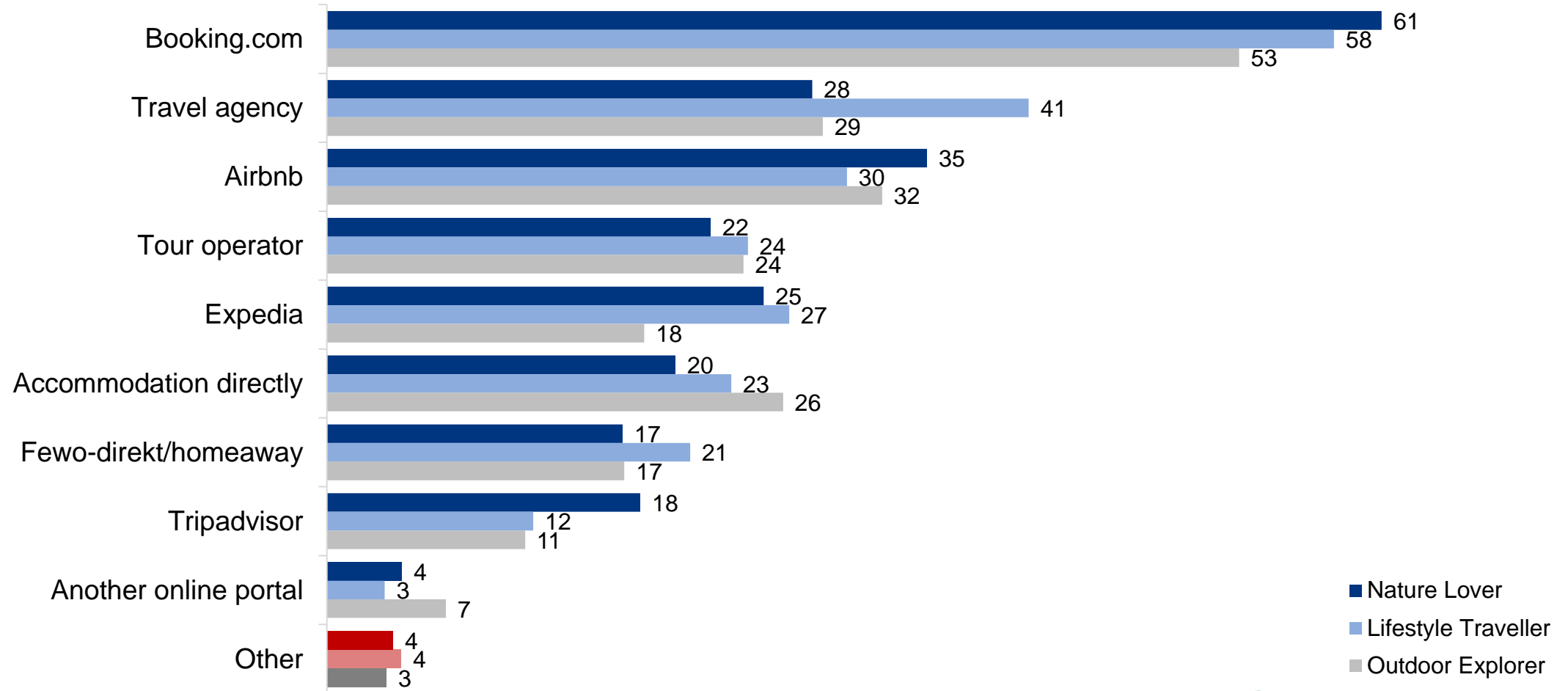
Preferred booking channels of trips to Finland



F14a: How would you like to book your holiday to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

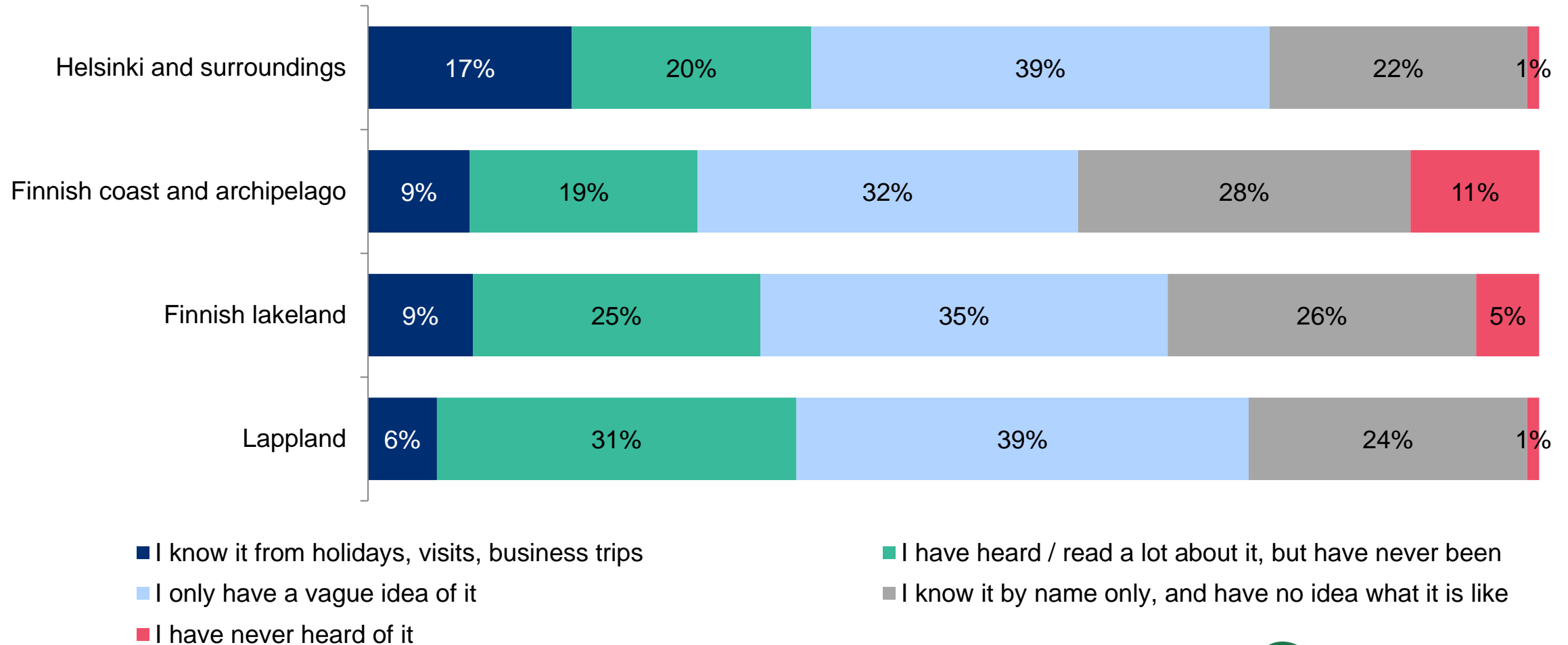
Visit-Finland-Segments:

Preferred places of booking of trips to Finland



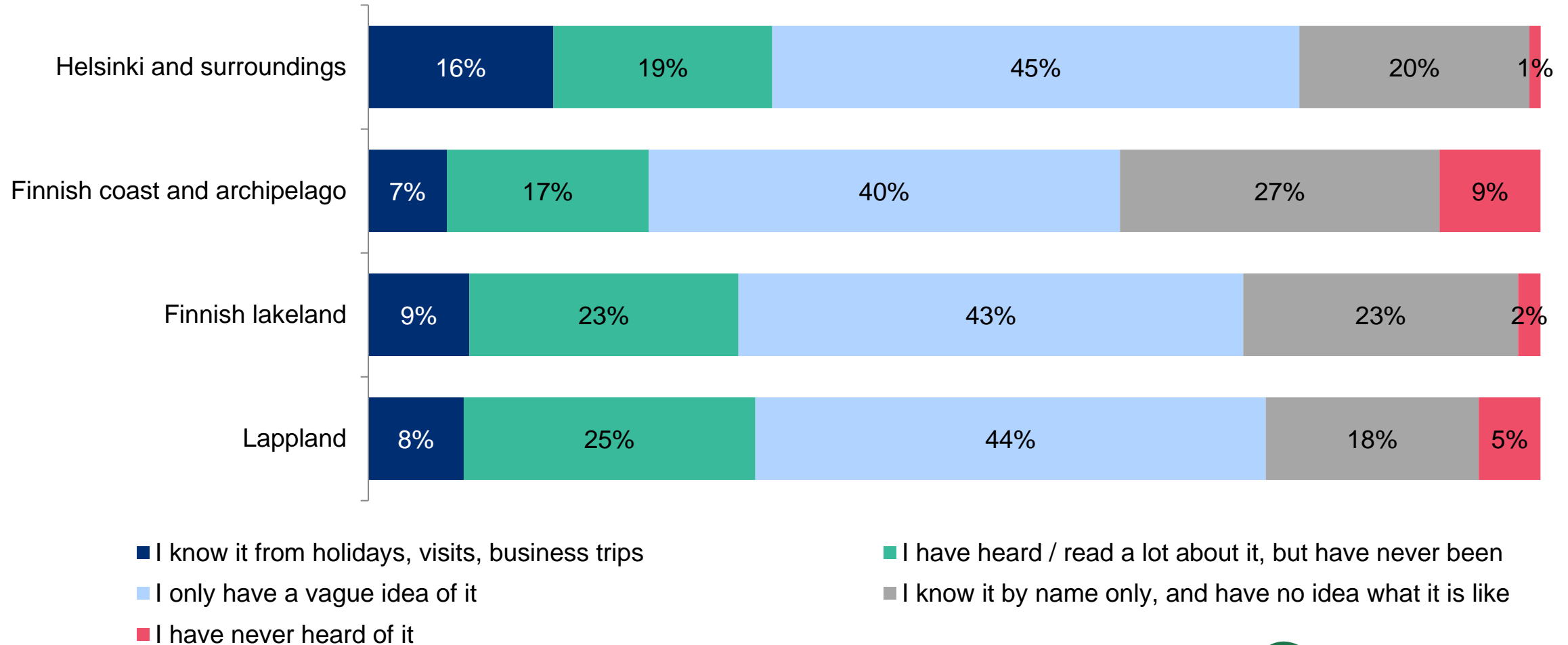
F15a: Where would you like to book your holiday to Finland?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Nature Lover: Awareness of Finnish destinations



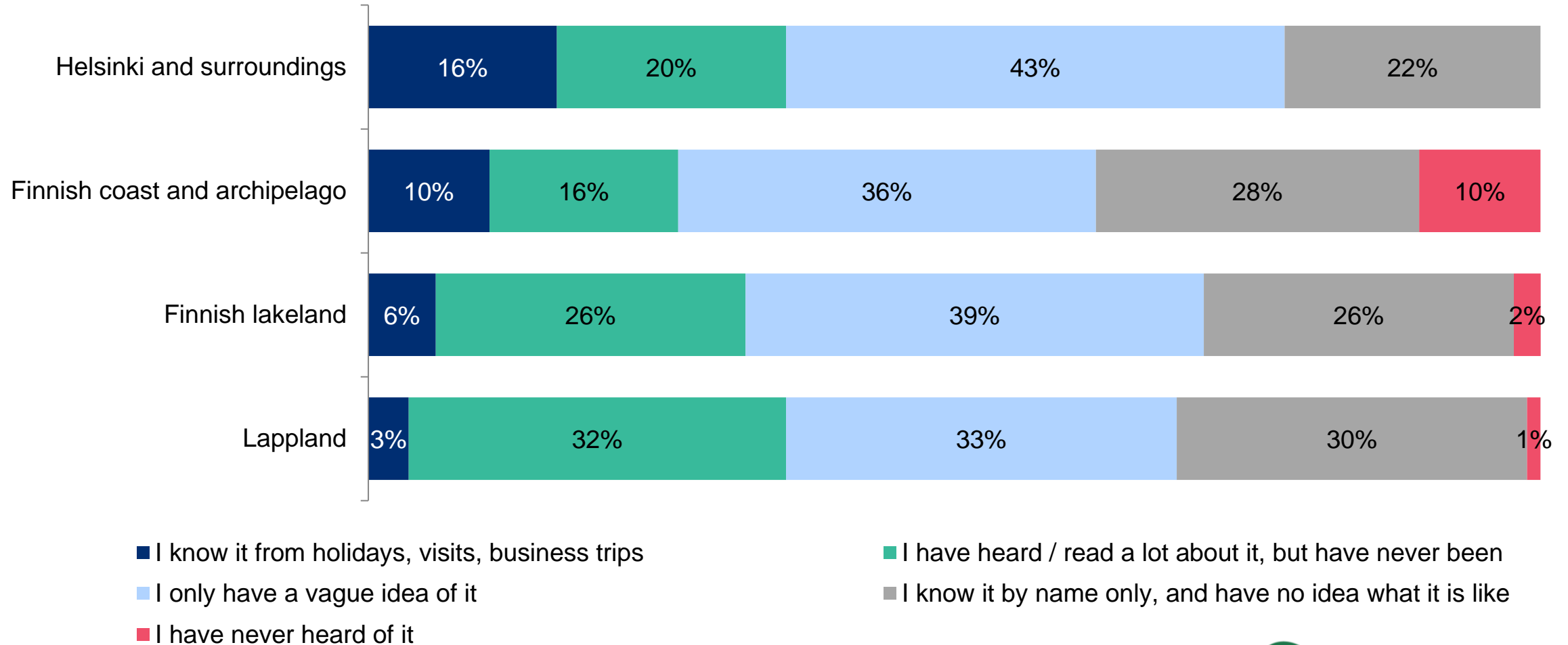
F16A: How well do you know the following regions?
Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 236);
Source: Finland Ad-hoc-survey 2024

Lifestyle Traveller: Awareness of Finnish destinations



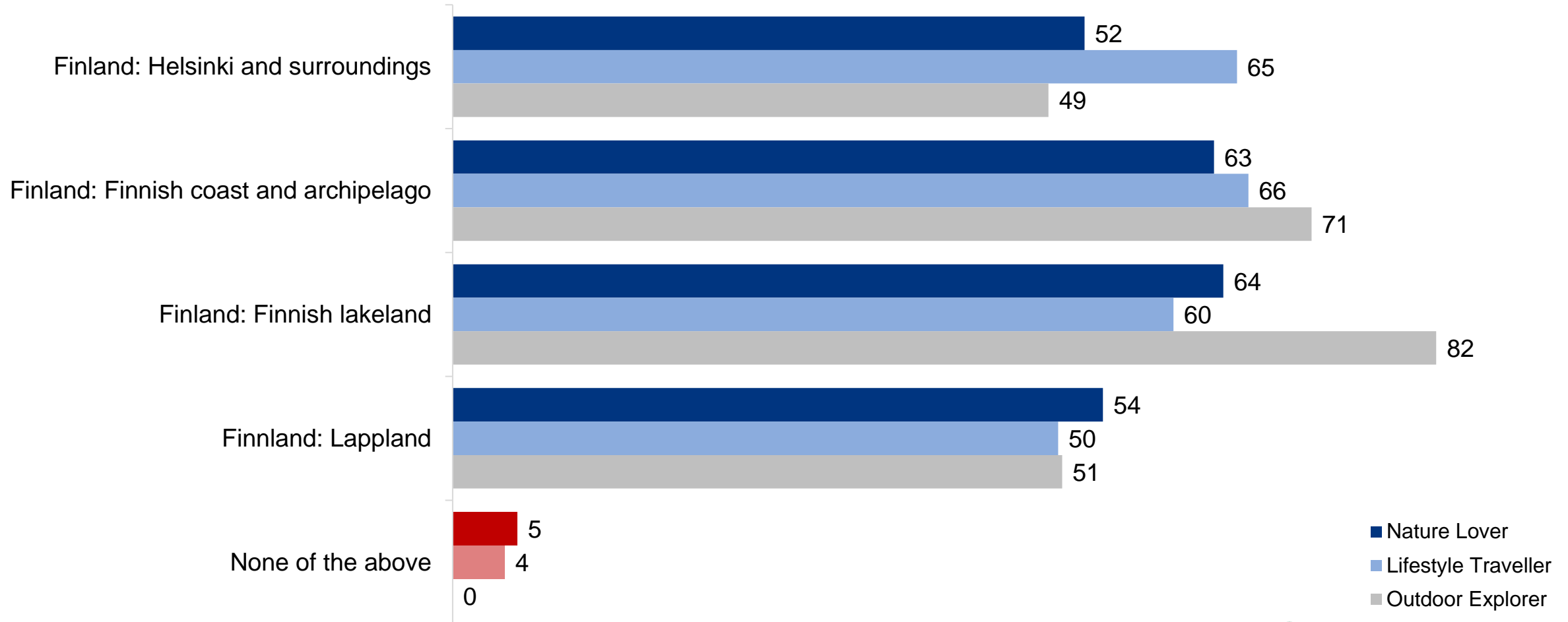
F16A: How well do you know the following regions?
Basis: Finland Potential 2024-2026 (n= 718); Lifestyle Traveller (n= 120);
Source: Finland Ad-hoc-survey 2024

Outdoor Explorer: Awareness of Finnish destinations



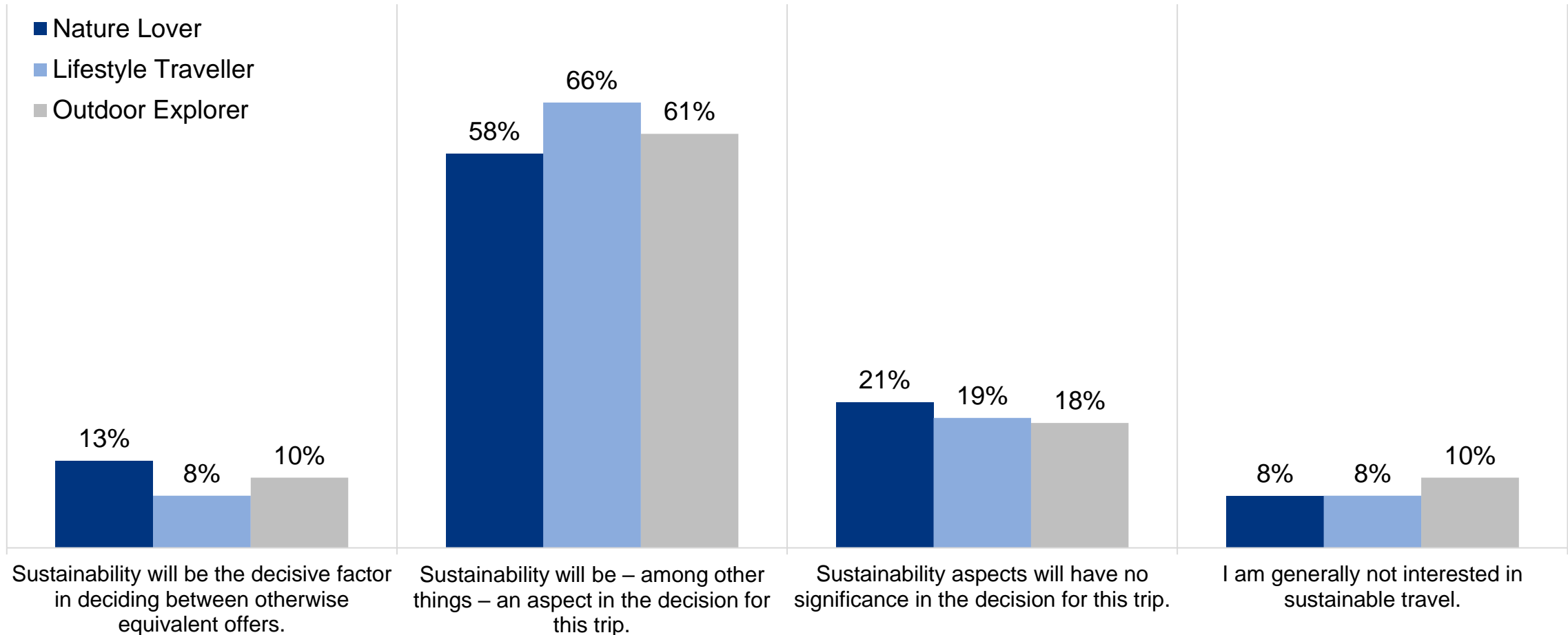
F16A: How well do you know the following regions?
Basis: Finland Potential 2024-2026 (n= 718); Outdoor Explorer (n= 52);
Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments: Interest to travel to the Finnish destinations



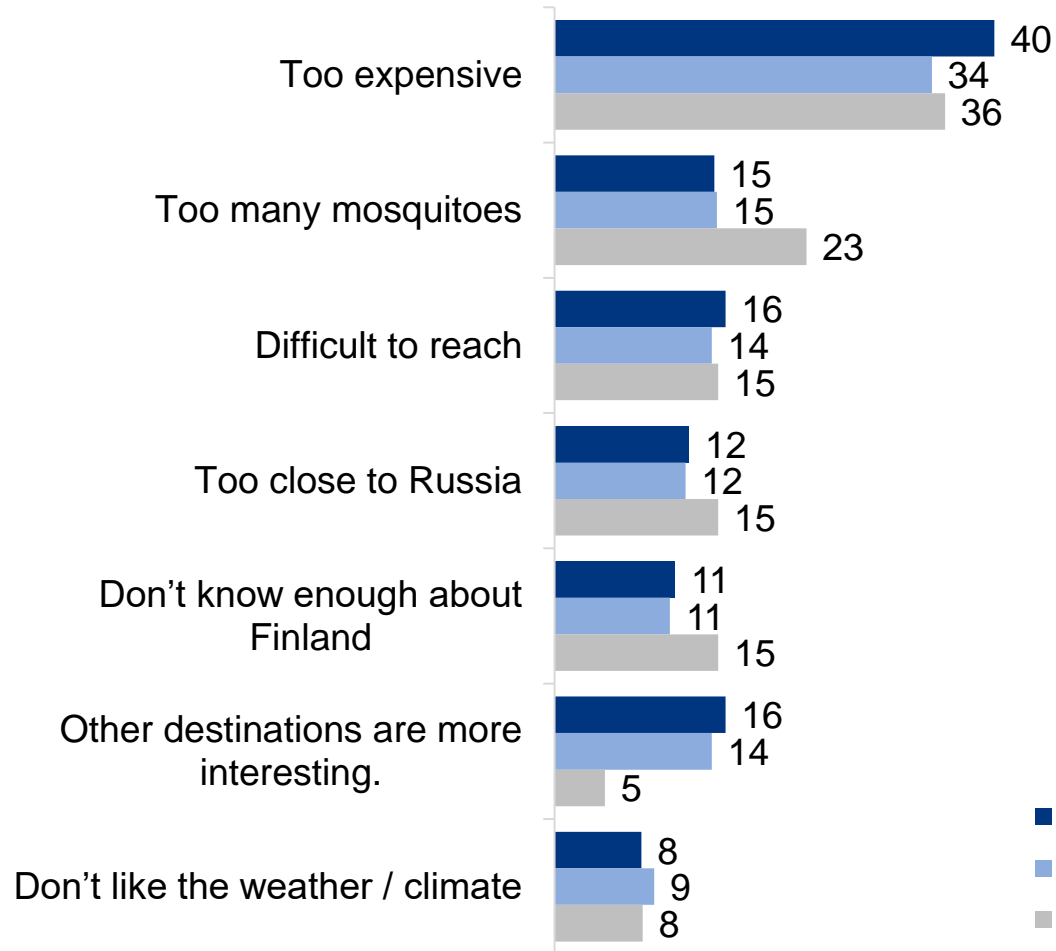
F16B: In which of the following regions would you like to go on holiday in the next three years?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments: Sustainability during future trips to Finland

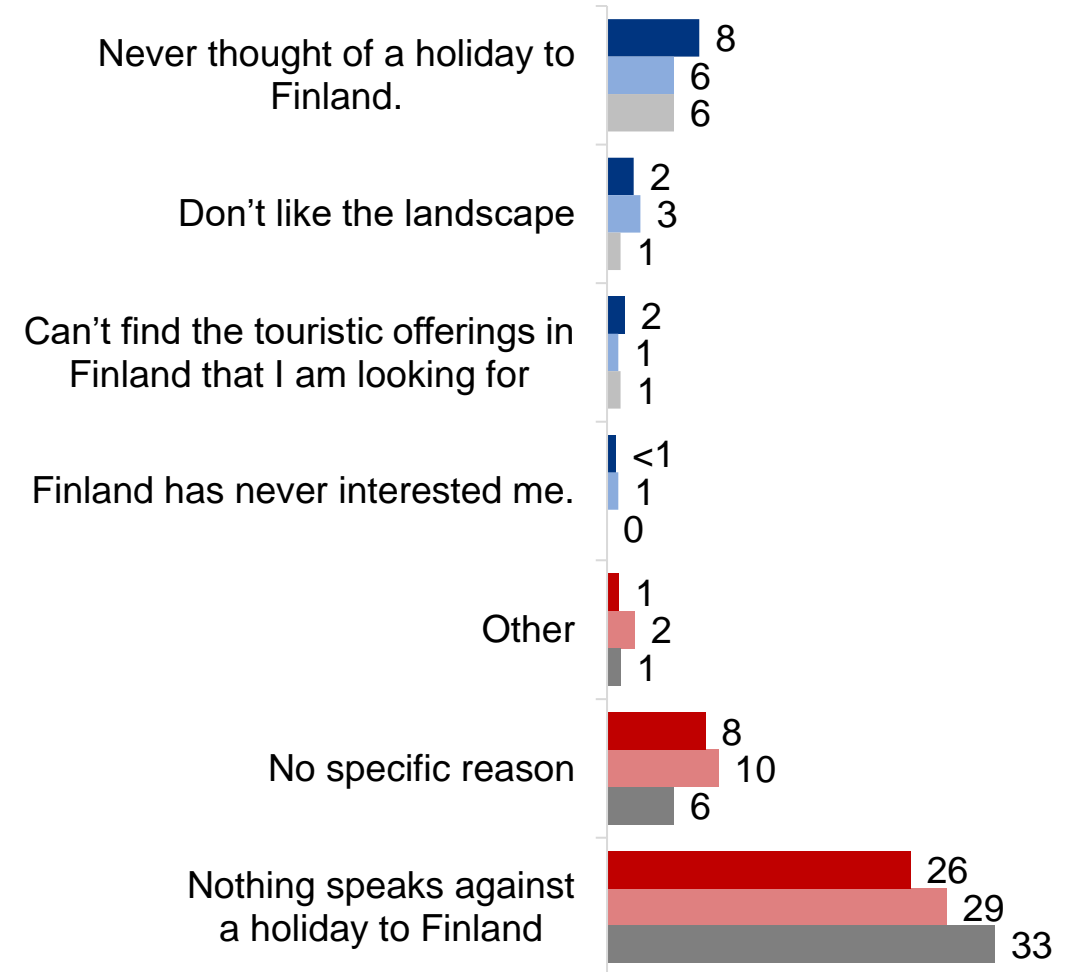


F17: Now the focus is on sustainability in holiday travel, i.e. how ecologically compatible, resource-saving, environmentally friendly and socially acceptable the holiday should be. If you think about a future holiday trip to Finland: Which of the following statements applies?
 Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87).
 Source: Finland Ad-hoc-survey 2024

Visit-Finland-Segments: Barriers against holidays in Finland



■ Nature Lover
■ Lifestyle Traveller
■ Outdoor Explorer



F18: What speaks against a holiday in Finland from your point of view?
Basis: Finland Potential 2024-2026 (n= 718); Nature Lover (n= 391); Lifestyle Traveller (n= 209); Outdoor Explorer (n= 87); in %.
Source: Finland Ad-hoc-survey 2024

ANNEX:
General key results
of the 54th Reiseanalyse

WELCOME TO THE KEY RESULTS OF THE REISEANALYSE 2023



The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to announce key results from the current Reiseanalyse 2024. The Reiseanalyse, which has been conducted annually for more than 50 years, is considered the most detailed study on German holiday travel demand. The FUR is a neutral, non-commercial interest group of tourism research users.

2023: Record holiday expenditure

For 2023, there were more than 54 million holiday travellers (5+ days), more than in the previous year and only slightly fewer than in 2019. At the same time, the total volume of holiday trips decreased slightly to 65 million. Total expenditure on holiday travel rose significantly to a new record of more than € 86 billion.

In terms of destinations, there was a further boost for outbound travel: 78% of holiday trips were to destinations outside Germany, 22% were domestic. Abroad, Spain dominated ahead of Italy, Turkey, Croatia and Greece. The market share of long-haul holidays was a record-breaking 9%. This was accompanied by further growth in air travel, hotel accommodation and package holidays – with market shares well above the pre-corona level. The increase in trip duration also matches this. This averaged 13.1 days in 2023 – significantly longer than in 2022 (12.6 days) and also longer than in 2019 (12.4 days).

2024: Optimism despite all crises

Despite the comparatively negative outlook for the economic situation, the Germans' holiday plans are positive: 73% of the population are planning to travel in 2024: 41% have already decided on their destination, while 32% still have their destination open. That is more than a year ago and similar figures to the years before the COVID pandemic.

Extensive travel history as well as a wide range of travel motives and holiday interests ensure that at least one long holiday trip a year is a part of life for most people. If money is tight, people tend to save in other areas rather than on the holiday itself. And there are also different strategies for holiday spending, which ultimately ensure that only few people miss out on their holidays for financial reasons.

This is a good basis for a successful tourism year in 2024.

Review 2023:

**Record expenditure and records for
destinations abroad**

VOLUME OF HOLIDAY TRAVEL IN 2023: Slightly more travellers & slightly fewer trips, spending at record level

Holiday travellers



54.2 million

2022: 53.1 m
2021: 47.8 m
2020: 44.6 m
2019: 55.2 m

Holiday trips



64.5 million

2022: 67.1 m
2021: 55.1 m
2020: 50.5 m
2019: 70.8 m

Expenditure on holiday travel



86.3 billion

2022: 80.1 bn
2021: 56.0 bn
2020: 45.1 bn
2019: 73.1 bn

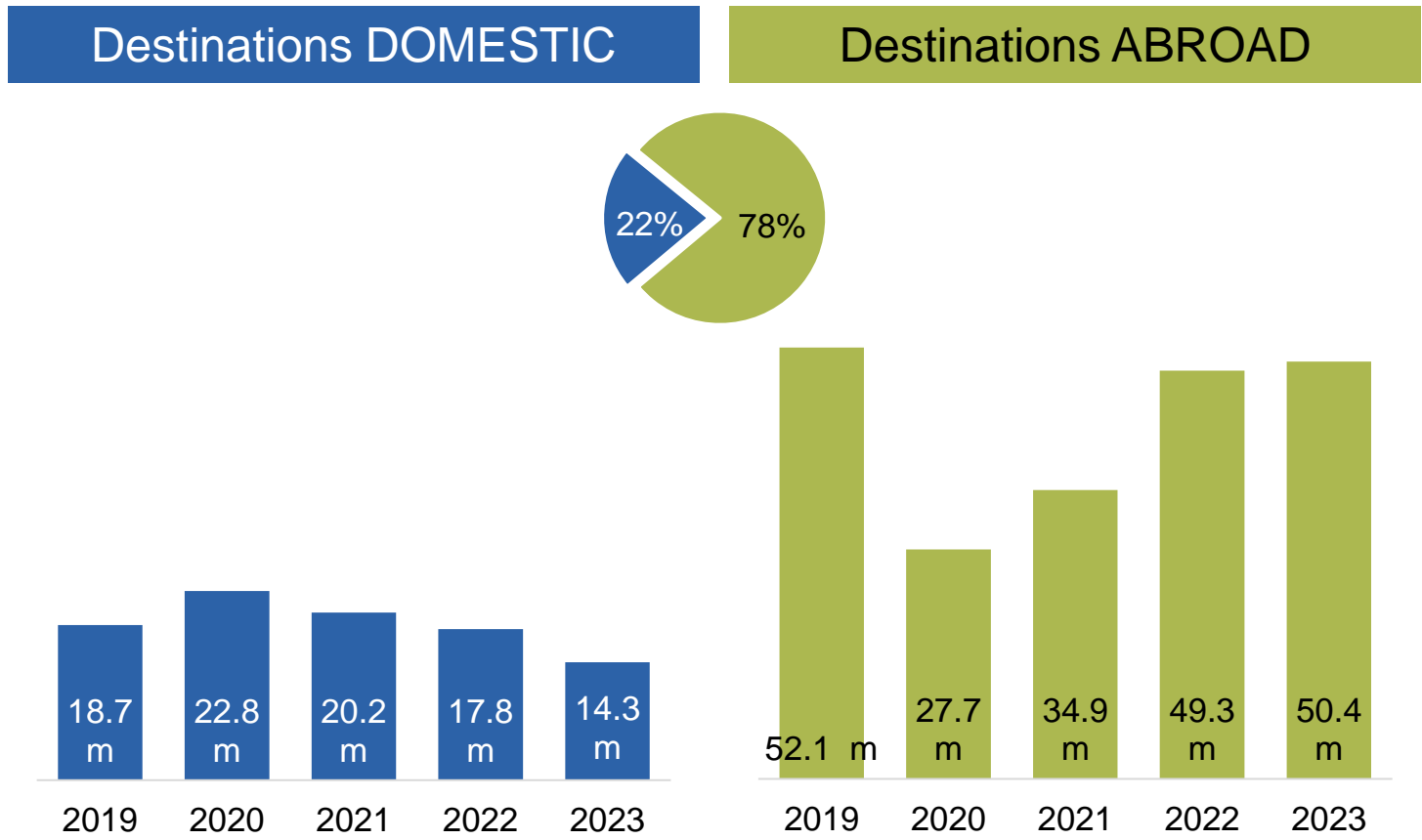
Holiday travel (5+ days)

The holiday travel propensity, the proportion of those who took at least one holiday trip of 5+ days in the year, was 77% in 2023. This corresponds to 54.2 million people. The figure has risen slightly compared to the previous year (75%) and is now almost on a par with 2019 (78%). In contrast, the number of holiday trips fell slightly year-on-year to 64.5 million. In terms of travel expenditure, 2023 was another record year: at € 86.3 billion, the volume was € almost 7 billion higher than in 2022.

Short breaks (2-4 days)

For the short holiday segment (of the 14-75 year olds), the key figures for 2023 are: 74 million short holiday trips with total expenditure of € 27 billion. These are very similar figures to the previous year and therefore slightly fewer trips than in 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2023: Proportion of trips abroad higher than ever before



Market shares domestic vs. abroad

Travelling abroad continues to be a clear trend in 2023. At 78% of all holiday trips, the share is higher than ever. At the same time, domestic holidays are down to a market share of 22%.

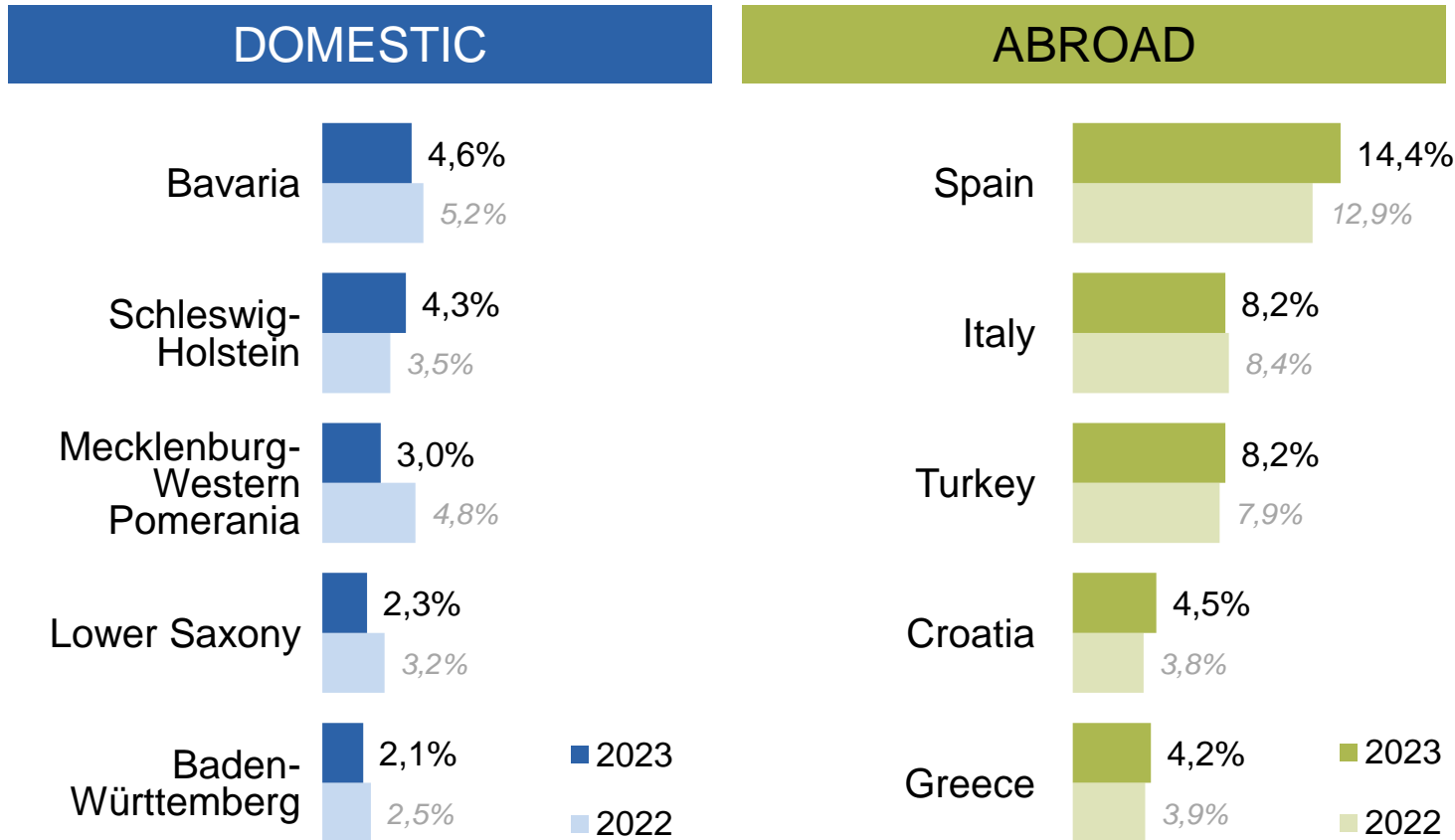
Domestic vs. foreign holiday volume

Destinations abroad account for over 50 million holiday trips in 2023, almost 1.1 million more than in the previous year and 1.7 million less than in 2019.

Despite its loss of market share, Germany is still by far the No. 1 holiday destination, although there was a decline of 3.6 million holiday trips compared to 2022.

Almost 80% of short holiday trips (2-4 days) in 2023 were domestic, similar to 2022 and 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2024: Bavaria is top within Germany, Spain is top abroad



Domestic destinations

Bavaria remains at the top of the ranking of the German federal states with the highest demand. Behind it, Schleswig-Holstein and Mecklenburg-Western Pomerania change positions. They are followed by Lower Saxony and Baden-Württemberg. With the exception of Schleswig-Holstein, all of these destinations have lost market share compared to the previous year.

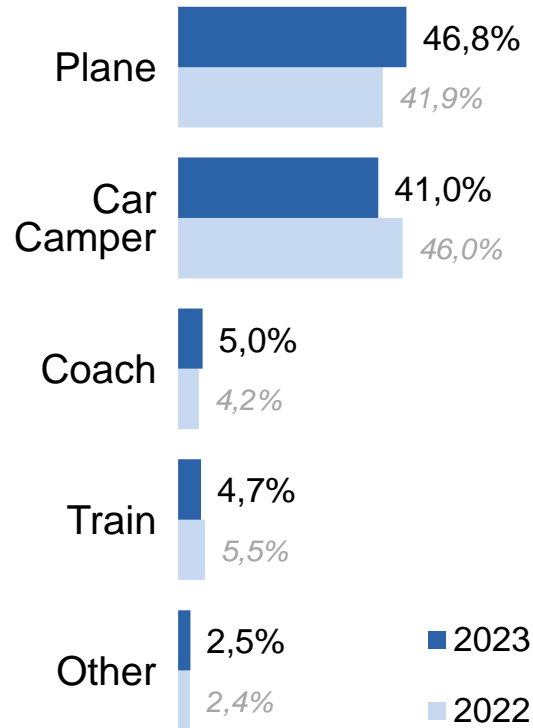
Destinations abroad

Spain continues to expand its dominance among the destinations abroad. It is followed by Italy, Turkey, Croatia and Greece with similar or slightly higher market shares than in the previous year. Austria is in 6th place with a market share of 3.9%, while long-haul destinations reach a new record of 9.3% (2022: 6.9%).

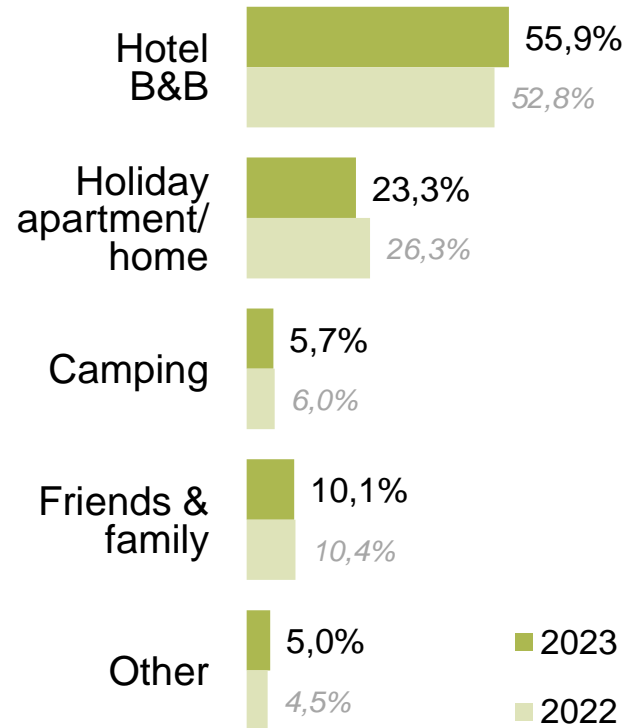
HOLIDAY TRAVEL BEHAVIOUR IN 2023:

Significant growth in air and hotel travel compared to 2022

Means of transport



Accommodation



Mode of transport

The increase in air travel (+2.1 million more holiday trips than in 2022) is in line with the dynamics of the destinations. The share of air travel is higher than ever, with the volume being at the same level as 2019.

Accommodation

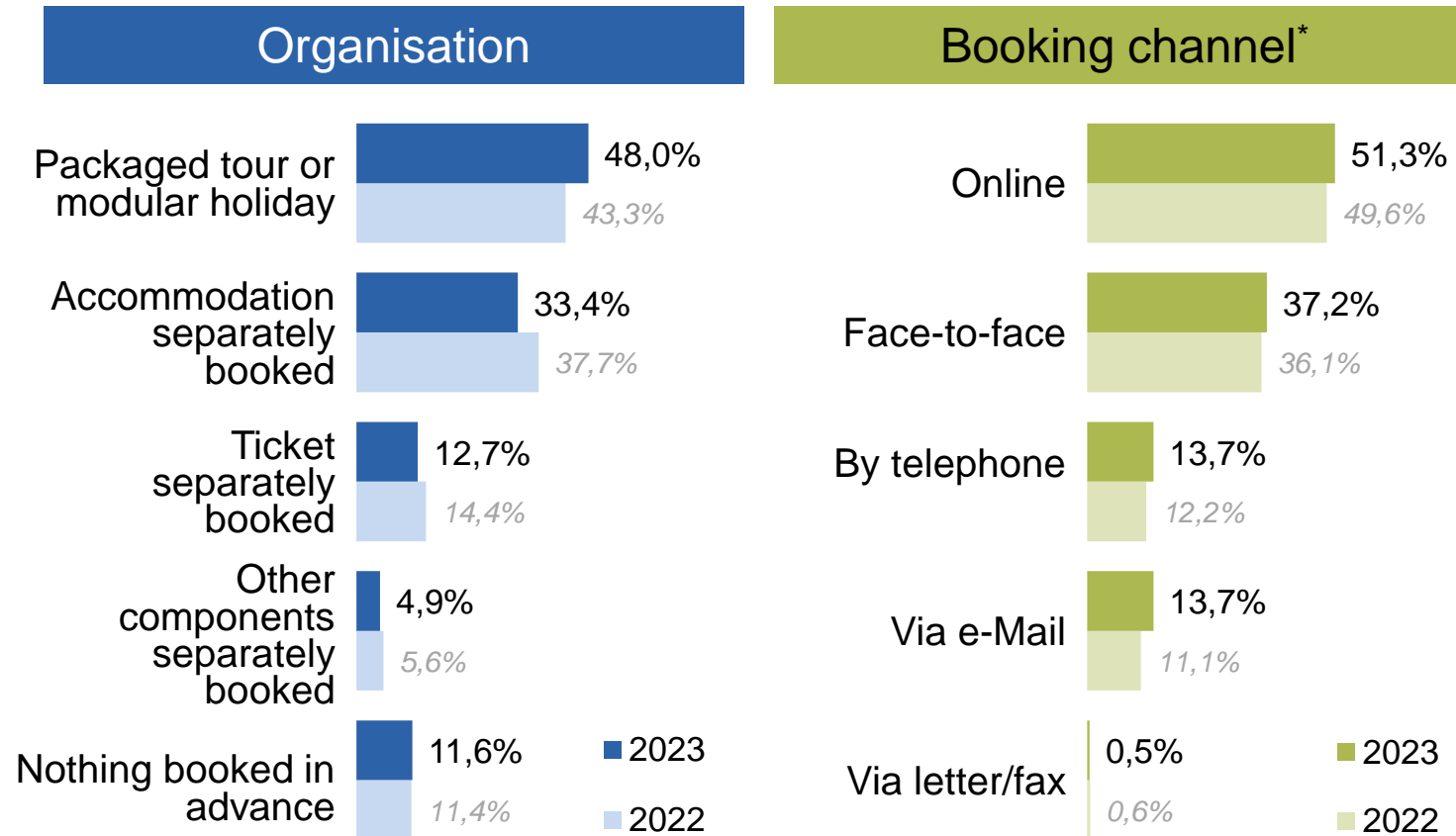
The trend in accommodation is corresponding. Hotels are recording further increases in market share and are now above the 2019 level.

Trip duration and expenditure

The average journey duration in 2023 was 13.1 days. This is significantly longer than in 2022 (12.6 days) and also longer than in 2019 (12.4 days). More was spent per person per trip in 2023 than ever before, on average of €1,337 (2022: €1,194; 2021: €1,017; 2020: €892; 2019: €1,032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2023:

Package holidays in the lead, online bookings dominate



Holiday organisation

In connection with the more frequent choice of destinations in the Mediterranean region, the number of package holidays increased significantly in 2023 compared to the previous year. At the same time, there were slightly fewer individual bookings than in 2022.

Booking channels

In 2023, more than 51% of all holiday trips were booked online. Services were booked in person for approximately 37% of all holiday trips.

The increase in online bookings is in line with the long-term trend. Contrary to the long-term downward trend, bookings made in person currently appear to be stabilising.

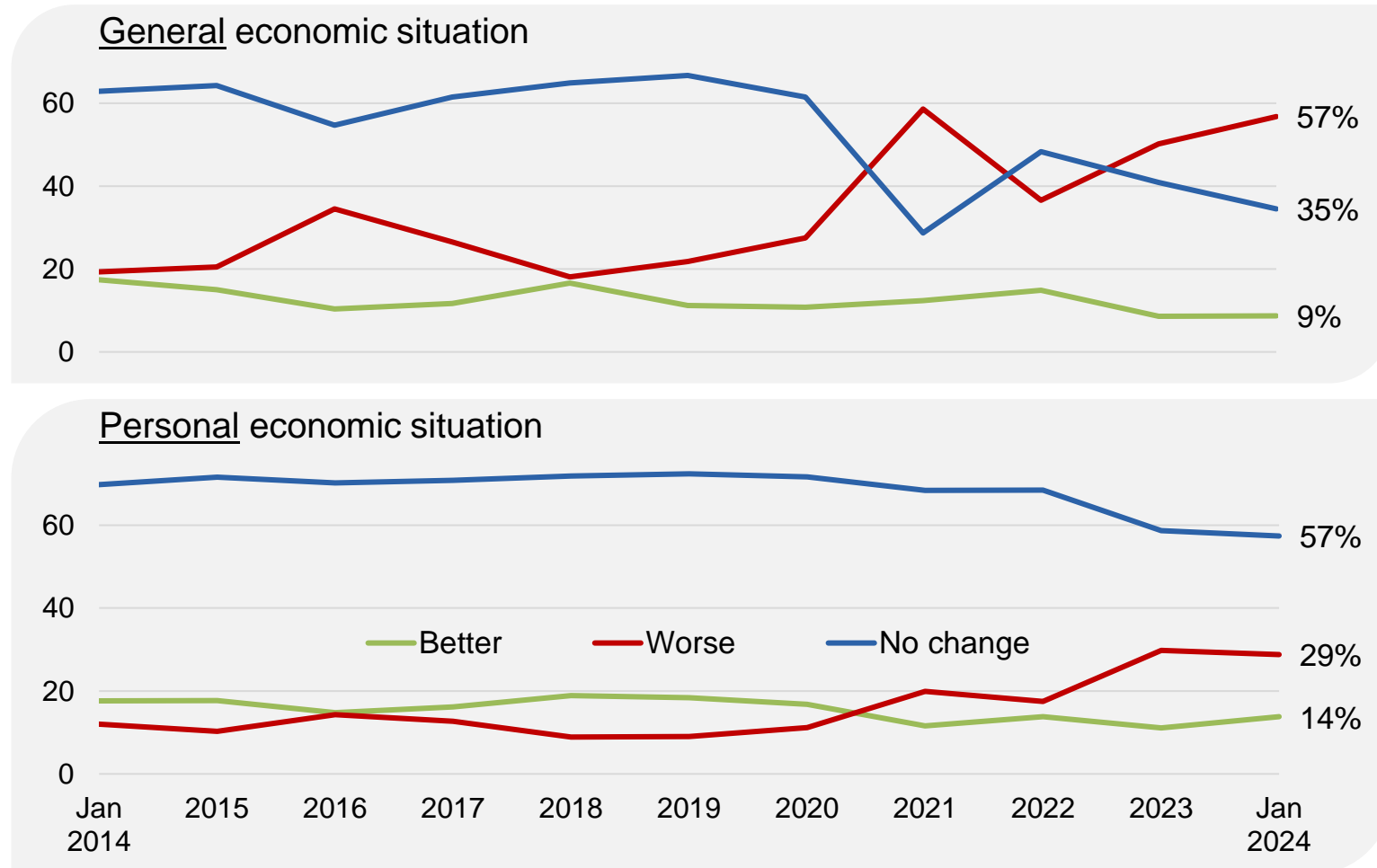
* only holiday trips with advance booking
 Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2023 lasting 5 days or more
 Source: RA 2024

Outlook 2024:

A good tourism year despite crises?

ASSESSMENT OF THE ECONOMIC SITUATION

Personal outlook very similar to the beginning of 2023



Assessment of the economic situation

In terms of general economic development, expectations have deteriorated further compared to January 2023. 57% of the population expect a decline in the coming 12 months.

Even more important for holiday demand is a look at the personal economic situation: the vast majority, namely 57% (previous year 59%), expect no change. 14% (previous year 11%) expect an improvement, 29% (previous year 30%) fear a decline.

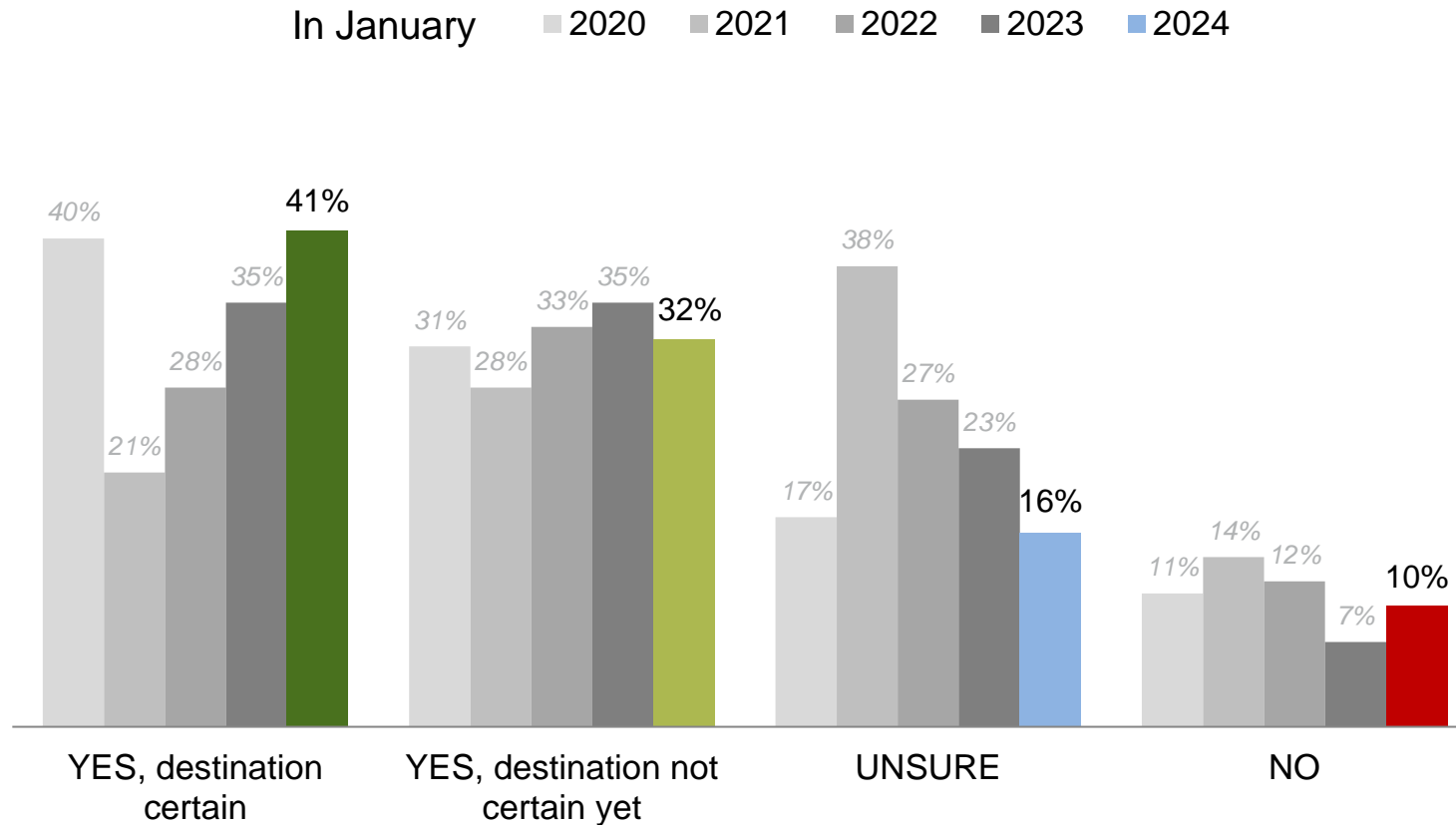
Although this is still a comparatively negative assessment of the situation, it means that 71% of the population have a stable or even positive personal economic outlook.

Question: How do you assess the general economic situation in Germany or 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 2024

TRAVEL PLANS 2024:

Most people already have definite plans for holiday trips



Status of holiday plans in January 2024

Despite the comparatively more negative outlook for the economic situation, the Germans' holiday plans are quite positive:

73% of the population plan to travel in 2024: For 41%, the destination is already fixed, for 32% the destination is still open. This is a good basis for a successful tourism year in 2024.

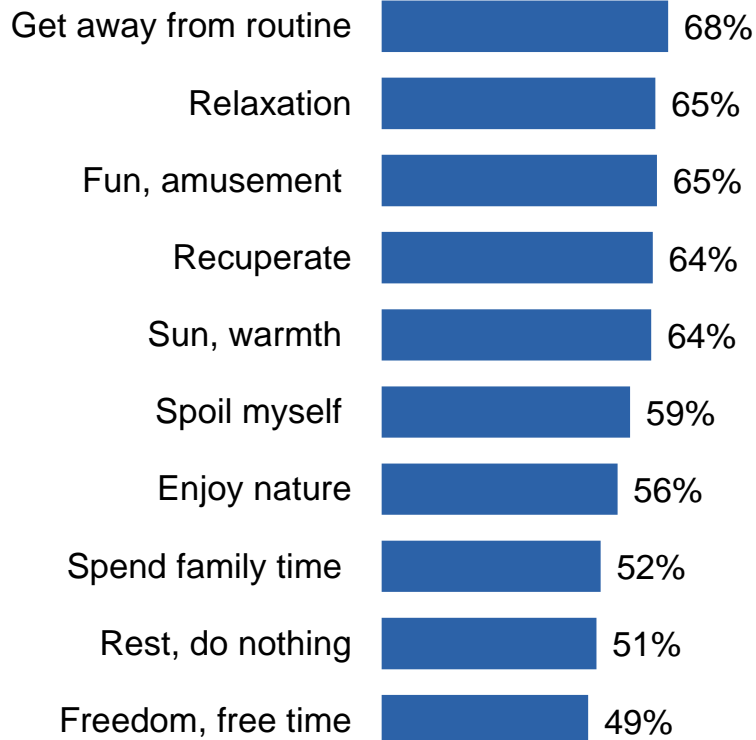
At 16%, the proportion of those who are unsure is at the same level as before the pandemic, as is the figure for those who are definitely not planning a holiday trip in 2024 (10%).

Question: *Thinking about this year, do you already have holiday plans for 2024? Which of this list applies to you?*
Basis: German-speaking population, aged 14 and over, in Germany
Source: RA 2024

GENERAL HOLIDAY MOTIVES

Desires and wishes have a stabilising effect on demand

Top 10 motives



Growth since 2019

Curiosity, exchange, destination interest

Nature, new impressions, culture, new experiences, travelling around, share experiences with others, discovering

Self-orientation, hedonism

Fun, indulgence, entertainment, beauty, health

Holiday motives in January 2024

The general holiday motives show that there are many good reasons for people in Germany to go on holiday. People are looking to get away from the daily routine, relaxation, fun and amusement, recuperation, sun and warmth, being spoilt and enjoyment of nature.

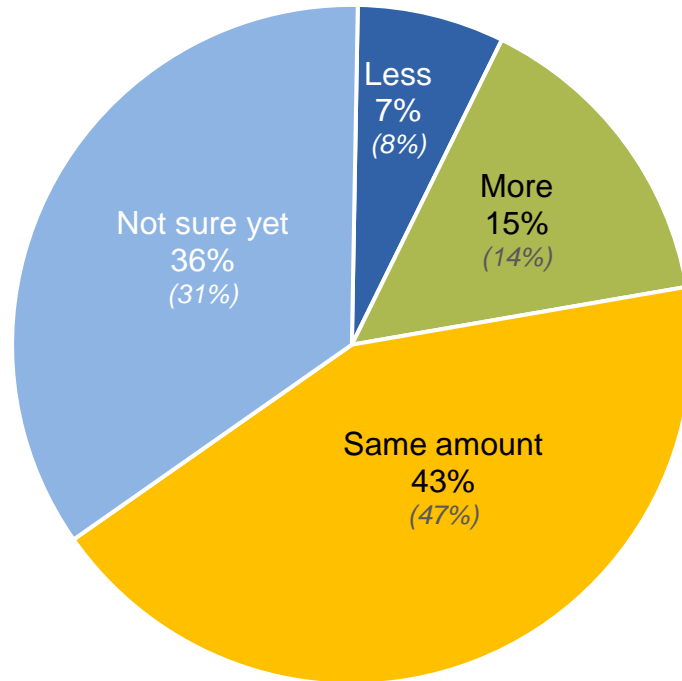
The average number of motives mentioned rose from 10.4 in the beginning of 2020 to 11.7 in January 2024.

The ranking of the top 10 motives is very stable. An increase in importance compared to before the pandemic can be found in two areas in particular: On the one hand, motives of curiosity, exchange and interest in destinations, and on the other, motives with self-reference and hedonism.

EXPENDITURE PLANS FOR HOLIDAY TRIPS IN 2024

Most plan to spend the same amount as last year

In 2024, will you spend less, more or the same amount?



Expenditure plans in January 2024

When it comes to holiday spending in 2024, 43% of people in Germany plan to spend the same amount as in the previous year. 36% do not yet know how their spending will develop. 15% plan to spend more and 7% less than in 2023.

These figures are at a similar level as one year ago, with a slight increase in "don't know yet" and a slight decrease in "same amount".

Savings options in consideration include looking for special offers, not travelling, choosing cheaper destinations and/or accommodation. If people are planning to spend more, this is due to increased holiday prices for most, but for some it is also because they want to travel more often, further and/or for longer.

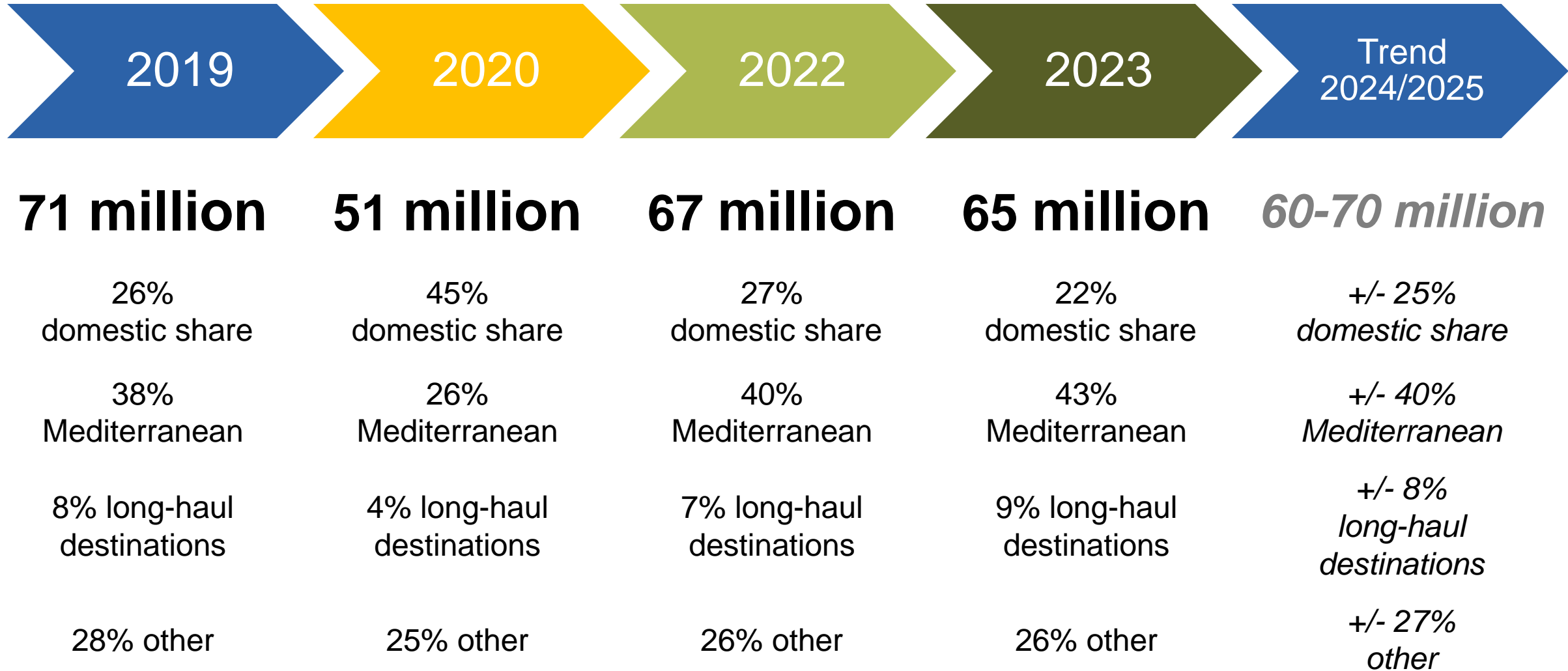
Question: *From today's perspective, what are you planning for your holiday trips in 2024 compared to 2023? Will you spend less, more or the same?*

Basis: German-speaking population aged 14 and over; figures from January 2023 in brackets

Source: RA 2023 and RA 2024

CONCLUSION:

Trends in volume and destinations of holiday trips



Basis: German-speaking population, aged 14 and over, in Germany - holiday trips lasting 5 days or more
Source: RA 2024; RA Trend Study 2030; * Data for 2024 Estimation based on RA Trend Study 2030

Information about the Reiseanalyse

DO YOU WANT TO KNOW MORE? BECOME A REISEANALYSE PARTNER!

The Reiseanalyse (RA) has been studying the travel behaviour of the German population for over 50 years. Several population-representative surveys (*face-to-face* and *online*) are conducted annually with a total of more than 13,000 respondents.

The Reiseanalyse is a participation survey, the costs of which are shared by the partners of the RA. A basic participation is a prerequisite for using the results of our investigations. Depending on the area of application, the basic scope of participation can be supplemented and individualised with further modules and extensions.

Partners of the Reiseanalyse include national and international DMOs, tour operators, transport companies, but also public institutions, associations and universities.

All details on the Reiseanalyse and your participation options at www.reiseanalyse.de

As a partner of the RA you will receive information on:

Holiday travel experience
of the last 3 years
for 80 destinations,
25 holiday types & 15 activities

Travel behaviour last
year
All about holidays
and short breaks

Travel intentions and
Holiday interests
80 destinations,
25 types of holiday

Detailed socio-demographics, holiday motives, internet use

Optional extensions:

Module topics

Own questions in the
surveys

Exclusive/additional
questions

Analysis software

Sinus®-Milieus

Consulting and analysis
services

Fields of application:

Target group segmentation

Advertising planning

Volume estimates &
Profitability analyses

Analyses of potential

Motive research

Benchmarking &
Brand tracking

Reiseanalyse Trend Study 2030 incl. Updates

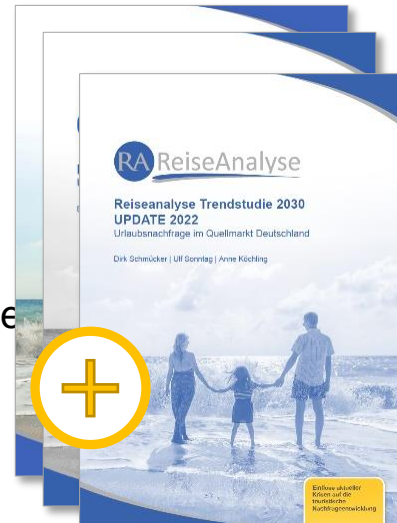
Holiday demand in the source market Germany

In October 2020, the fifth edition of the Reiseanalyse Trend Study was published. The Trend Study describes the long-term development of the demand side of holiday tourism in Germany, from the early 1970s to the year 2030.

In the meantime, two updates have been published that include the effects of the pandemic and the current crises on travel behaviour.

The basis for the updates were more extensive findings from several surveys within the framework of the Reiseanalyse as well as findings from scientific publications.

Latest update in German only



ISBN Trend Study 2030: 978-3-949752-04-9
148 pages (plus 44 pages update 2021 and 24 pages update 2022)
reiseanalyse.de/trendstudie-2030/

RA 2023: Summary of the results

Structure and development of demand for holiday travel

The annual *summary of the Reiseanalyse* focuses on a detailed summary of the key findings of our most recent research. The latest edition deals with the findings on travel behaviour in the travel year 2022.

In addition to selected results, time series and comparisons with the previous year, the summary also contains evaluations of short holiday trips by the German-speaking population.

A short version of the RA 2024 will be published in autumn 2024.



ISBN: 978-3-949752-02-5
97 pages, 103 illustrations
reiseanalyse.de/kurzfassung/

These Reiseanalyse publications are available in German as well as in English translation.

Further information and ordering at www.reiseanalyse.de/publications/



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