

Is the Nordic Momentum truth or myth?

Deep dive into German market trends

Helsinki, 28 November 2023
Ulf Sonntag, NIT



Visit Finland



- » Holiday demand & interests of the Germans
- » Annually since 1972
- » 7,000 interviews *face-to-face* plus 7,000 interviews *online*
- » Multi-client
- » Non-profit association



Visit Finland



Studiosus



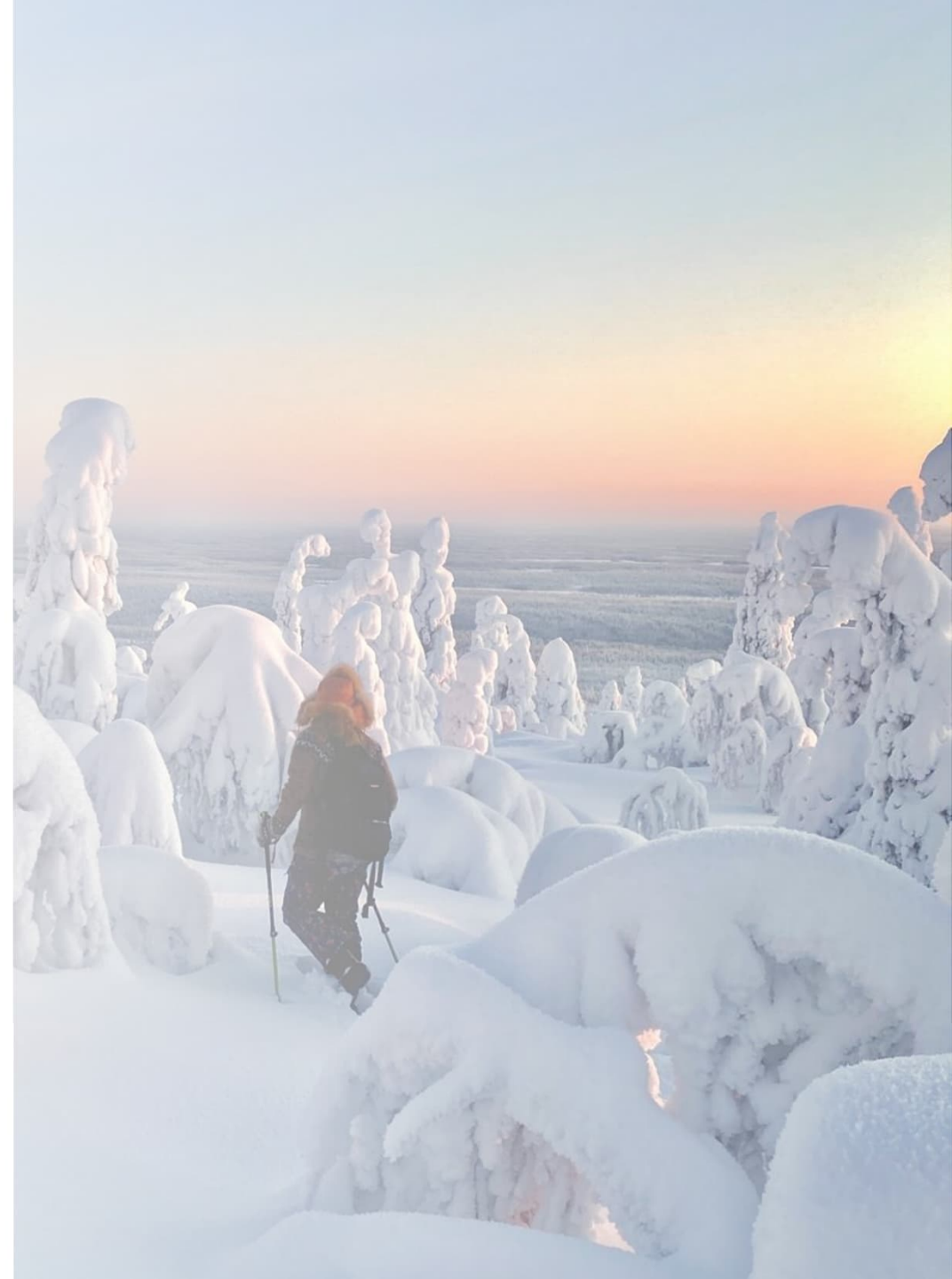
1982



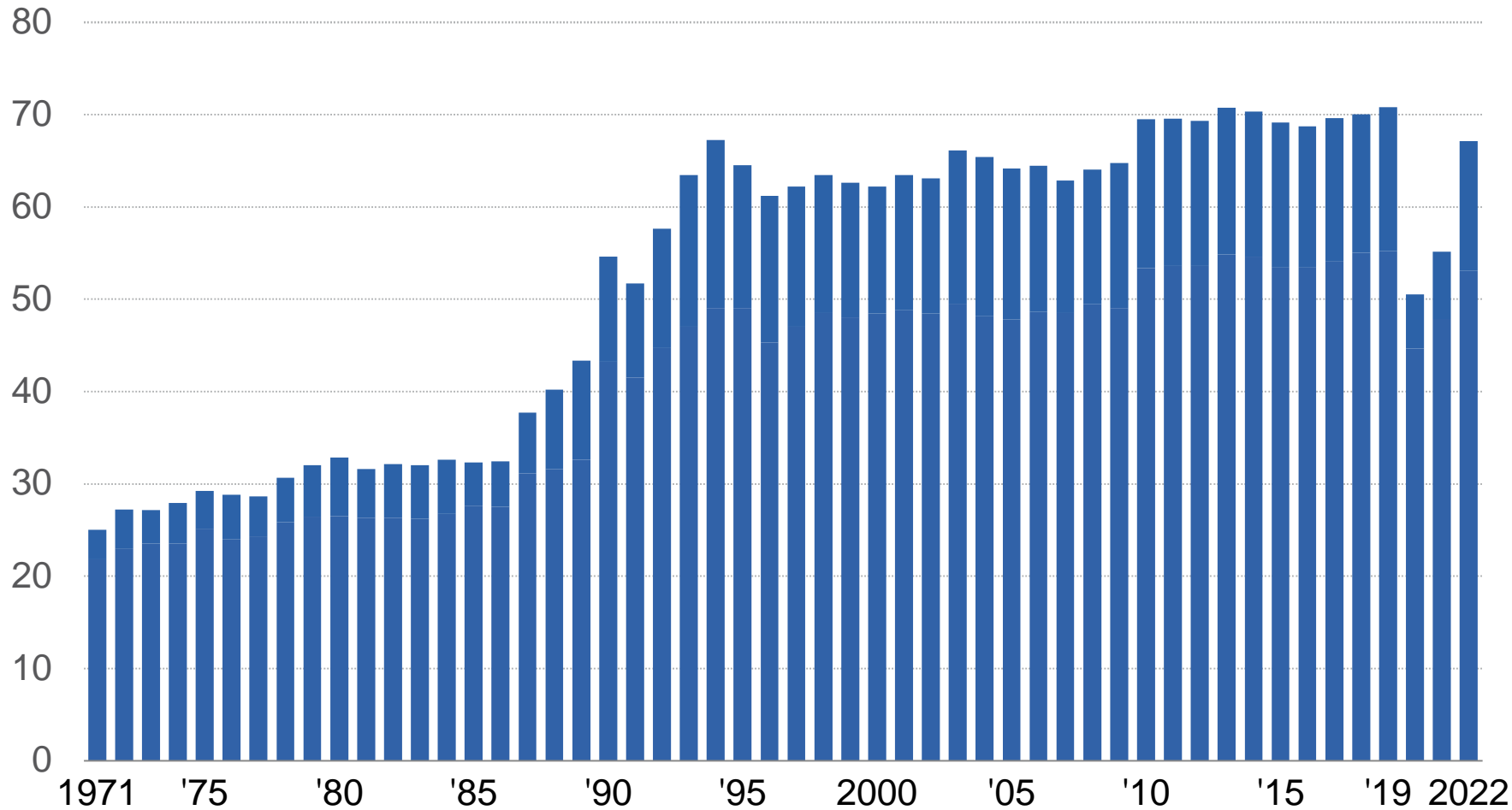
2023



You can count on the
German market!



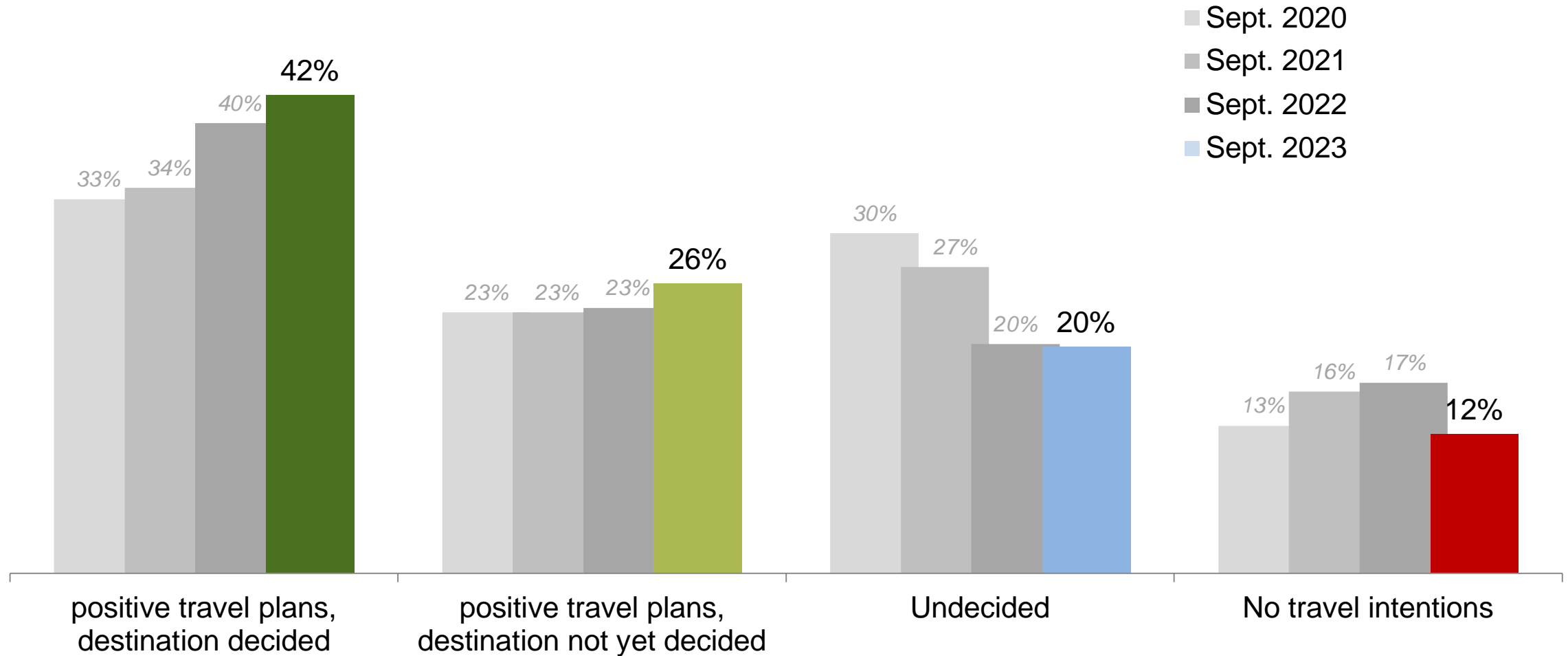
Number of holiday trips 1971-2022




2022: 67 million
Holiday trips 5+ days

Basis: Holiday trips 1971-2022 of the German-speaking population 14+ years in Germany
Source: Reiseanalyse 2023

September 2023: Holiday travel plans next 12 months





Nordic Momentum: What does our data tell us?

How important are the Nordics for the German travellers

Mediterranean 10x bigger than Nordics, both increasing



40% Mediterranean ↗
EU and outside EU

8% Alps ↘
Alpine regions of DE, AT, CH, FR, IT, SL

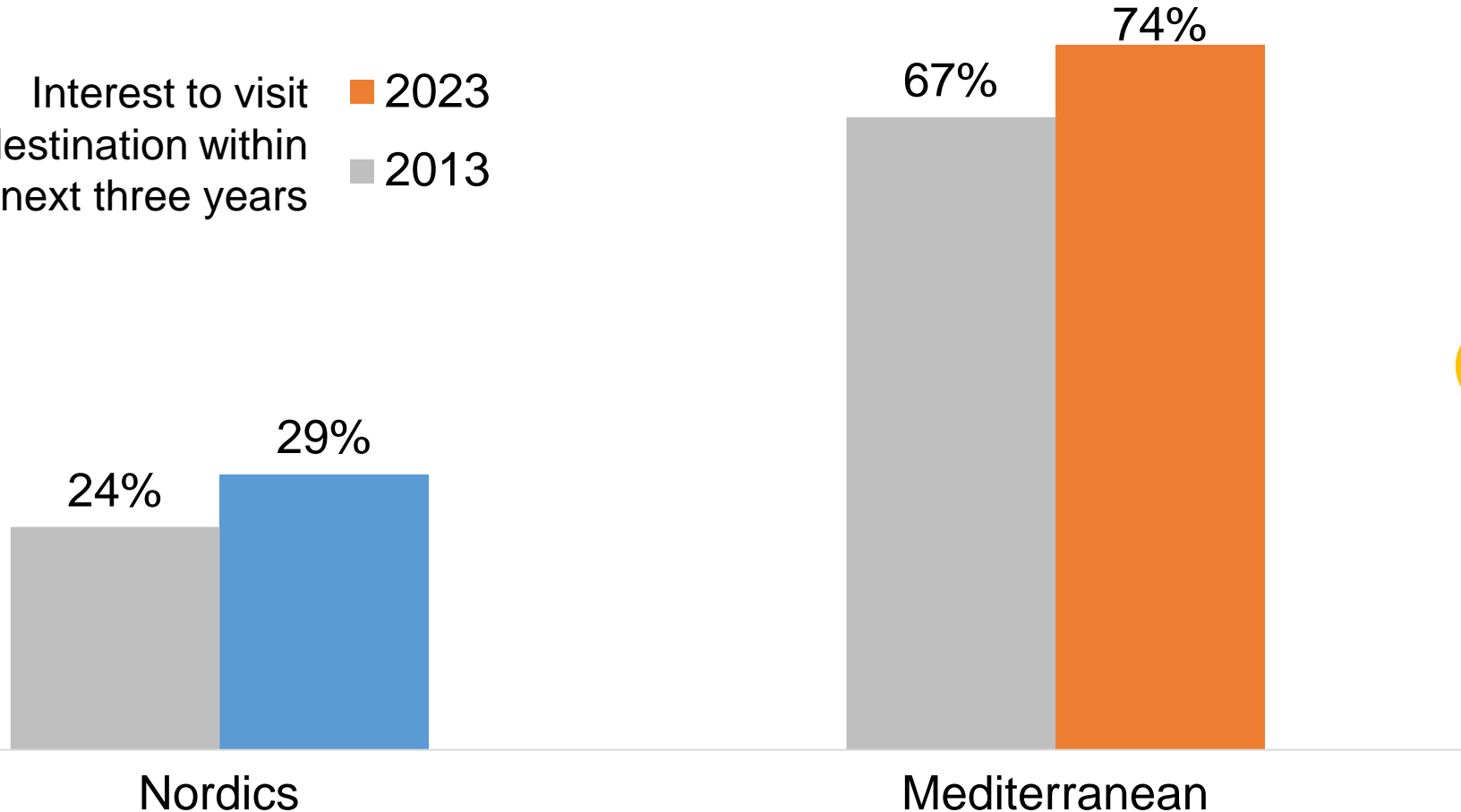
4% Nordics ↗
FI, DK, SE, NO, IS

Interest to travel to Nordics next 3 years

29% are interested in the Nordics, more than 2013

Interest to visit destination within the next three years

- 2023
- 2013

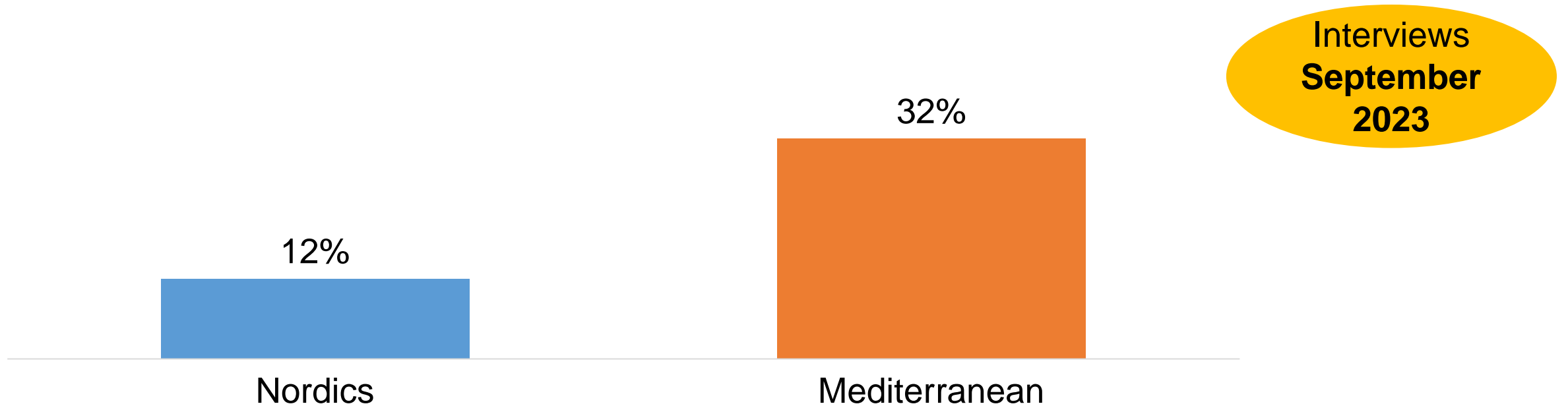


Interviews
January
2023

“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? And which of these countries would you generally consider as a holiday destination in the next three years?”

Basis: German/German-speaking population 14+ years in Germany; Source: Reiseanalyse 2013 & 2023

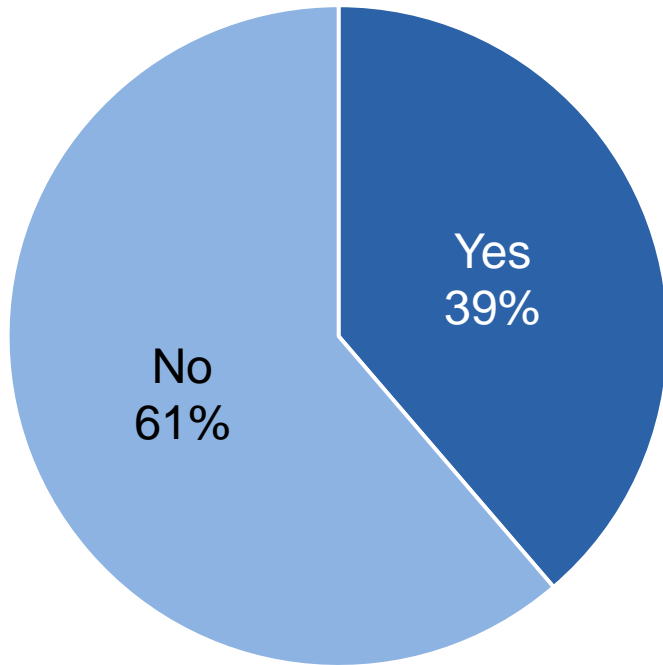
Desire to travel to Nordics next 12 months: Gap between Mediterranean und Nordics remains



“Which destinations are you most likely to travel to for holidays in the next 12 months”
Basis: German/German-speaking population 14+ years in Germany;
Source: Reiseanalyse 2024 (survey UPDATE in September 2023)

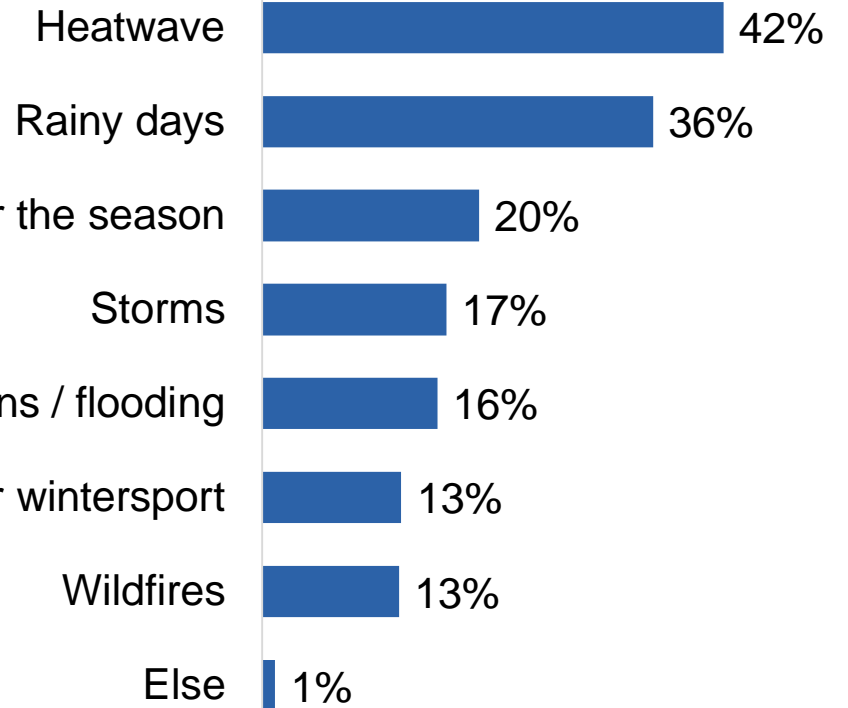
Negative weather experiences 2022/2023: Rain/cold with a similar impact as heat

Did you experience weather phenomena on your trips of the last 12 months that had a negative impact on your holiday experience?



Too cold / variable for the season

Too little snow for wintersport



Nordic Momentum, really?

Near Tampere end of July 2023



Don't expect climate change to do your job!
You can do it better 😊

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

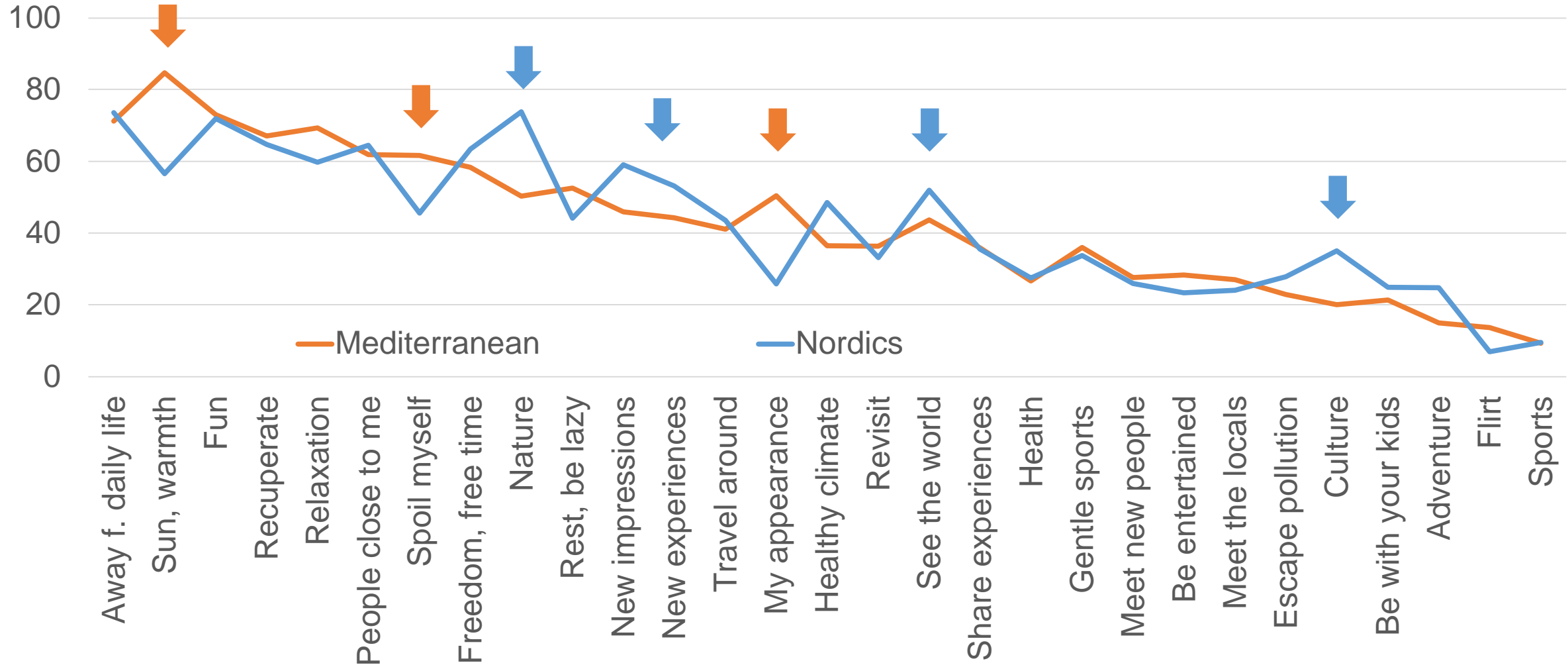
Ibiza end of October 2023



Good reasons
to go North ...

Travellers to Nordics & MED: General holiday motivation

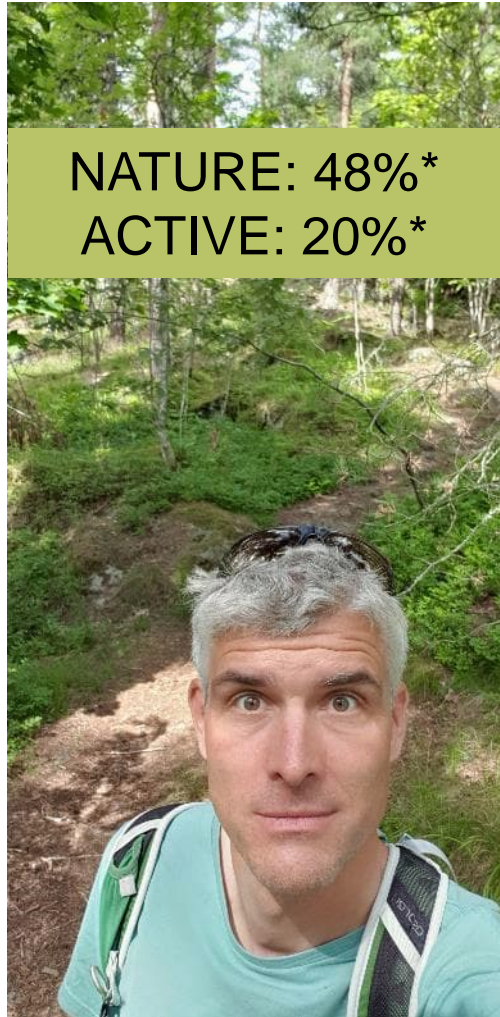
Nature, curiosity and culture are distinguishing for the North



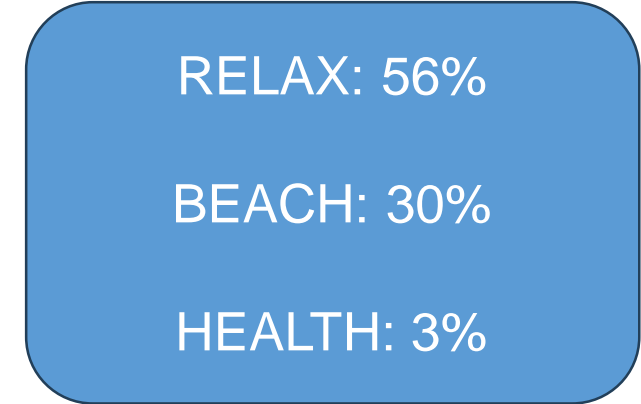
Basis: Holiday travellers 2022 to the Mediterranean and the Nordics within the German-speaking population 14+ years in Germany;
Source: Reiseanalyse 2023

What do the Germans do in the Nordics?

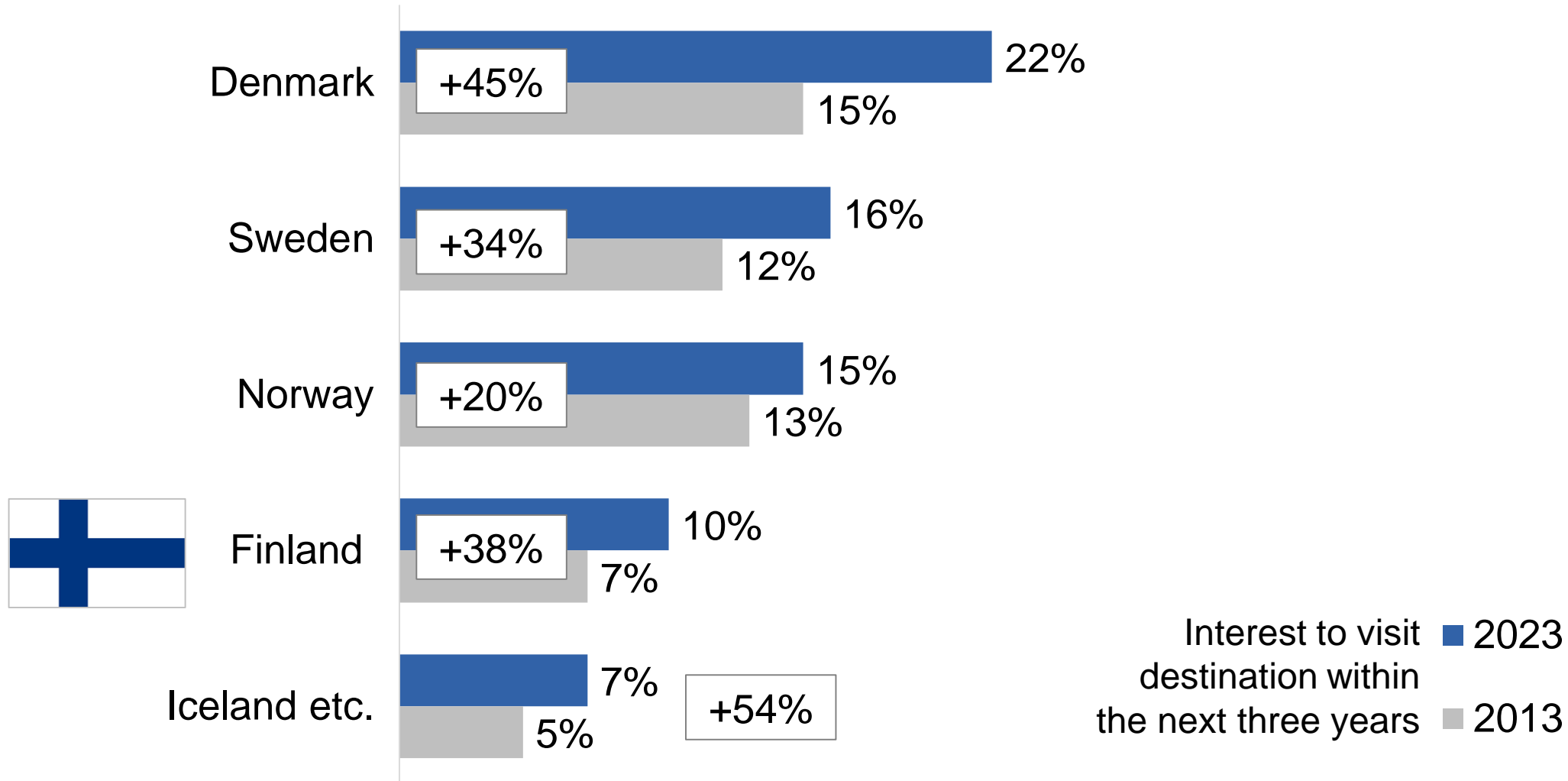
Travel behaviour in accordance with the general motives



Photos: Ulf Sonntag



Interest to travel to the Nordics: Share of actual and potential guests by destinations



“Are you almost definitely planning to go on a holiday to one of these countries in the next three years? And which of these countries would you generally consider as a holiday destination in the next three years?”

Basis: German/German-speaking population 14+ years in Germany; Source: Reiseanalyse 2013 & 2023

Finland on the German market:

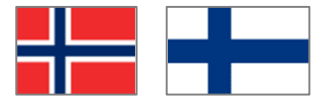
Most are interested in all three Scandinavian destinations



5.5 million



0.3 million



0.3 million



0.6 million



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



Population

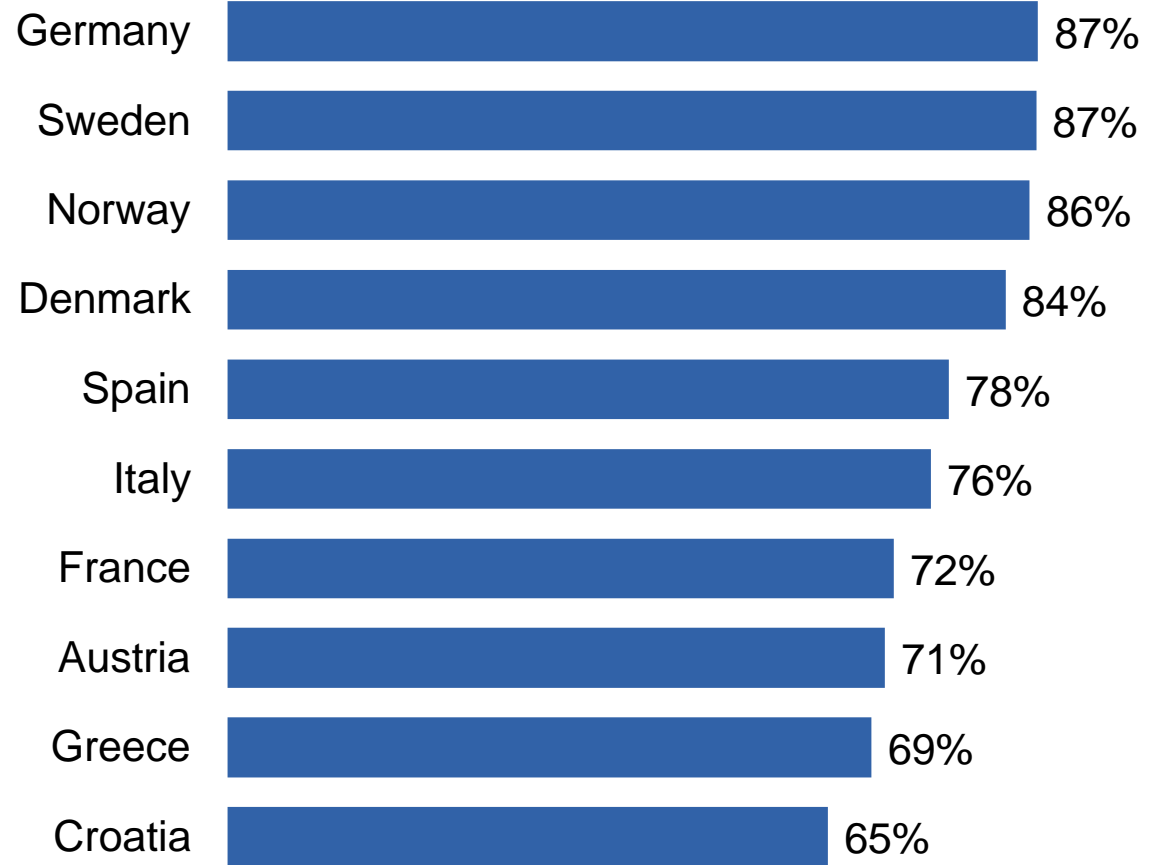
9.4

Potential travellers to Finland

30.1

Number of destinations interested in 2023-2025

People, interested to go to Finland 2023-2025 for a holiday also would go to ...



And what about
Finland?



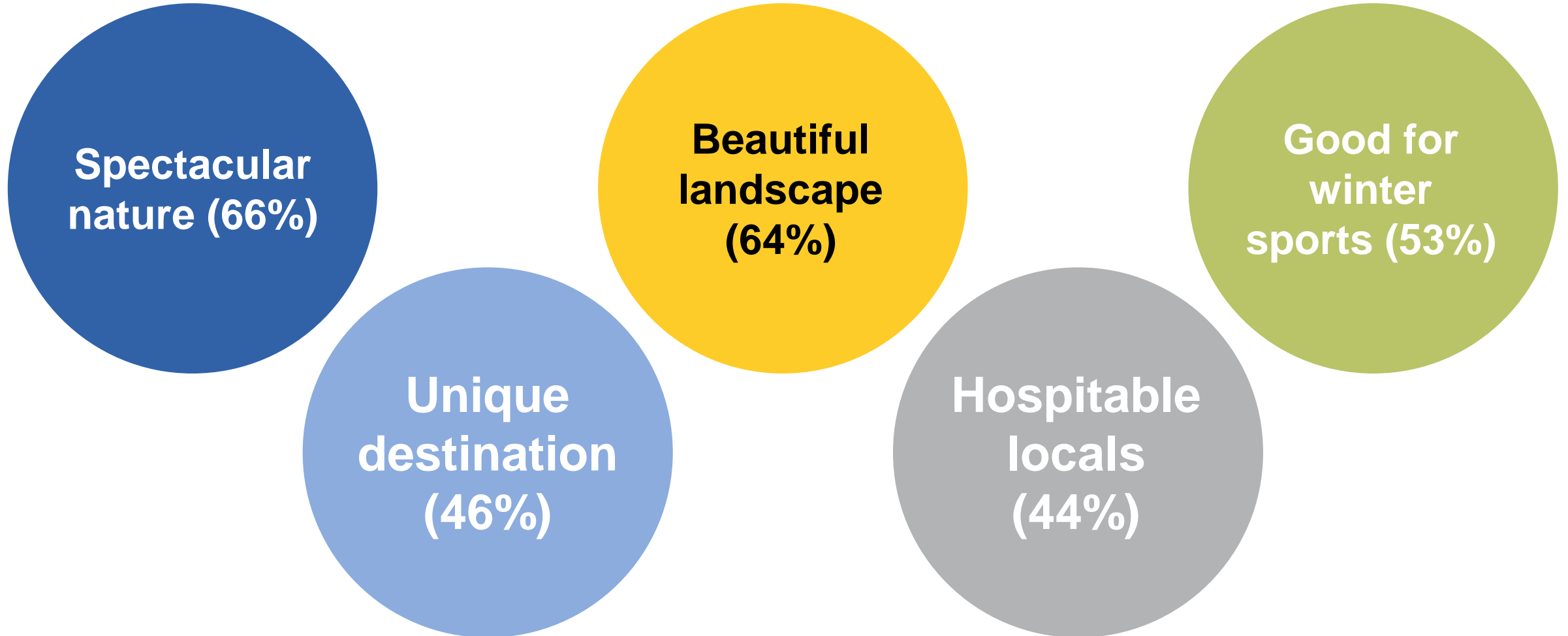
Finland in one word (Nov. 2020): Cold, Nature, Lakes, Helsinki



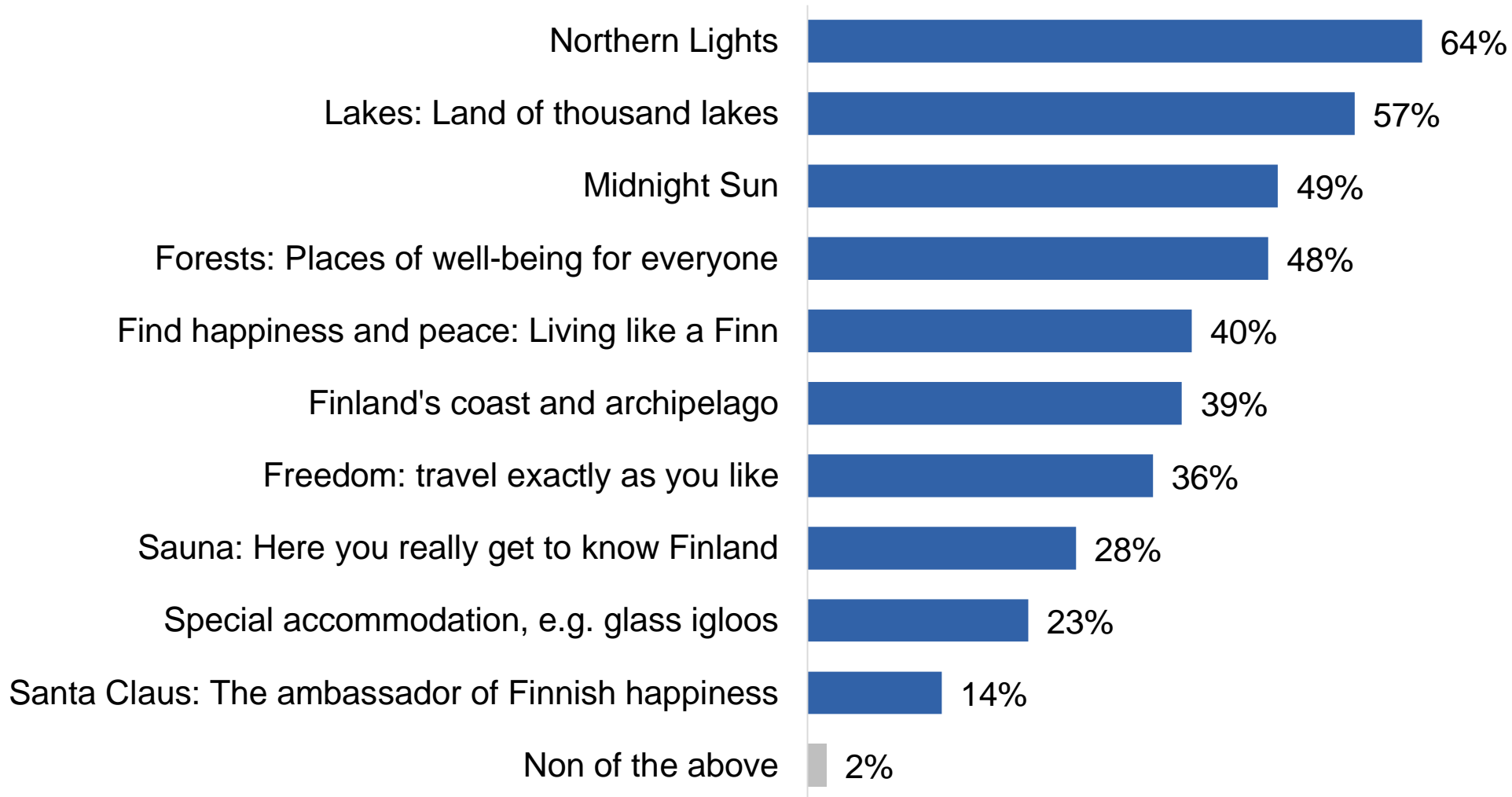
Question: Now think of Finland as a holiday destination. Please tell us in one word what comes to your mind when you think of Finland as a travel destination? [open question]

Basis: German-speaking population aged 14-75 years (n=2,611), source: RA online 11/2020

Image of Finland (Jan. 2021)



Highlights of Finland (Nov. 2021): Northern Lights, Lakes, Midnight Sun, Forests



Question: What do you think are the special highlights of Finland as a holiday destination? in %

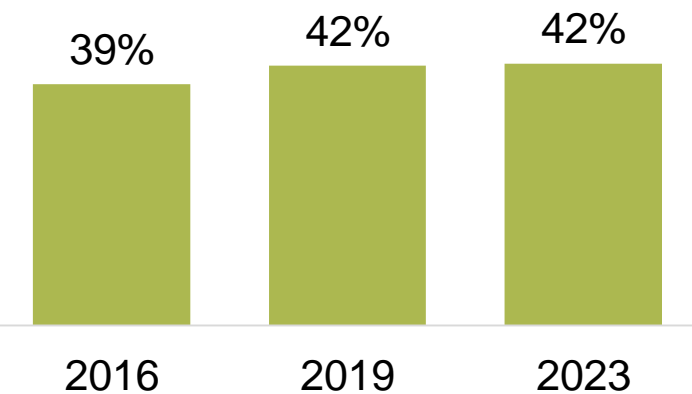
Basis: German-speaking population aged 14-75 years (n=2,611), therein Finland-Potential (interest in at least one of the Finnish regions; n=1,361), source: RA *online* 11/2020

How about
sustainability?



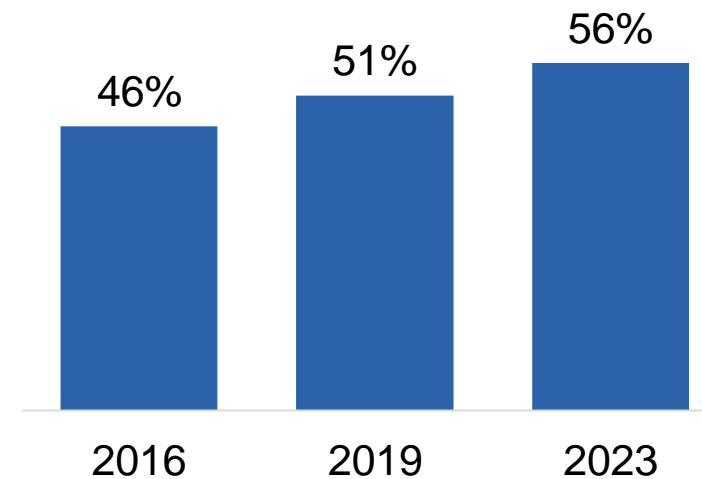
Sustainability and holidays: Many travellers want their holiday to be sustainable

Environmental sustainability



My holiday should be as ecologically sound as possible, be resource saving and environmentally friendly.

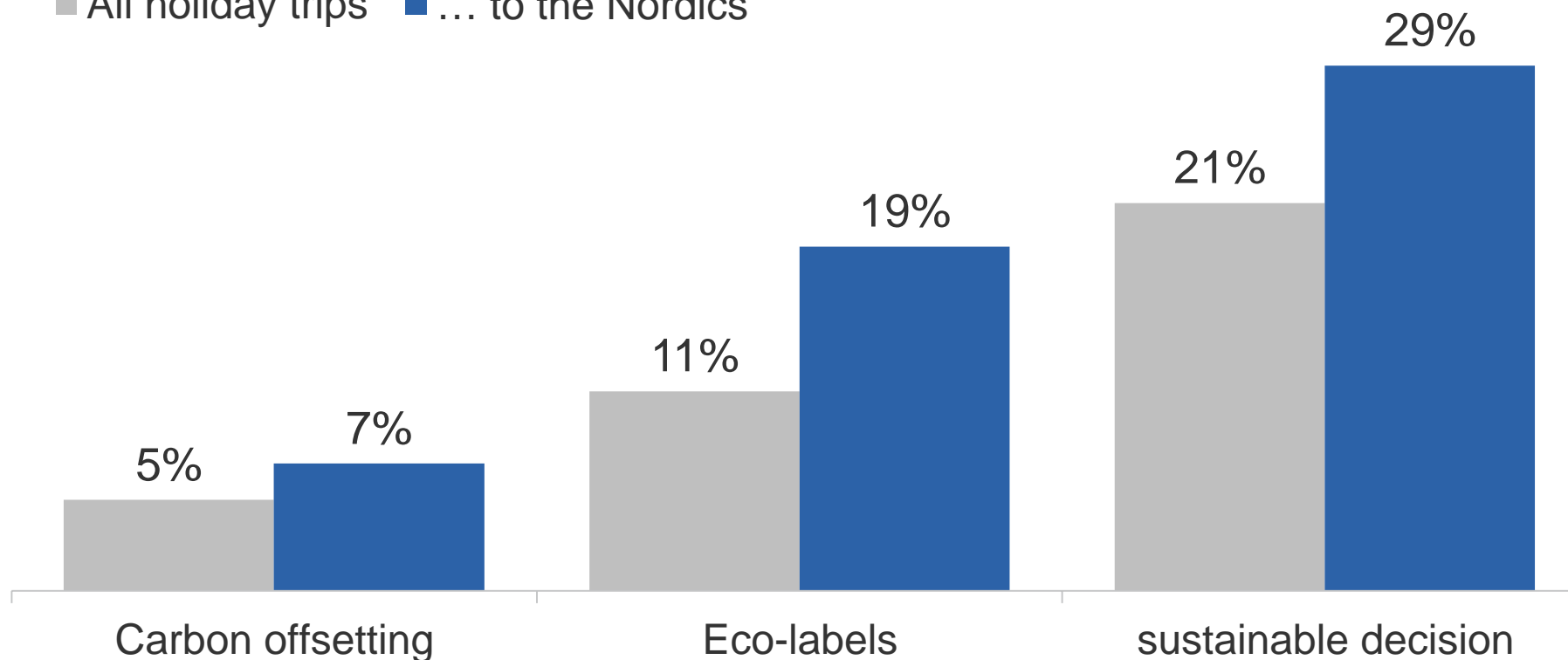
Social sustainability



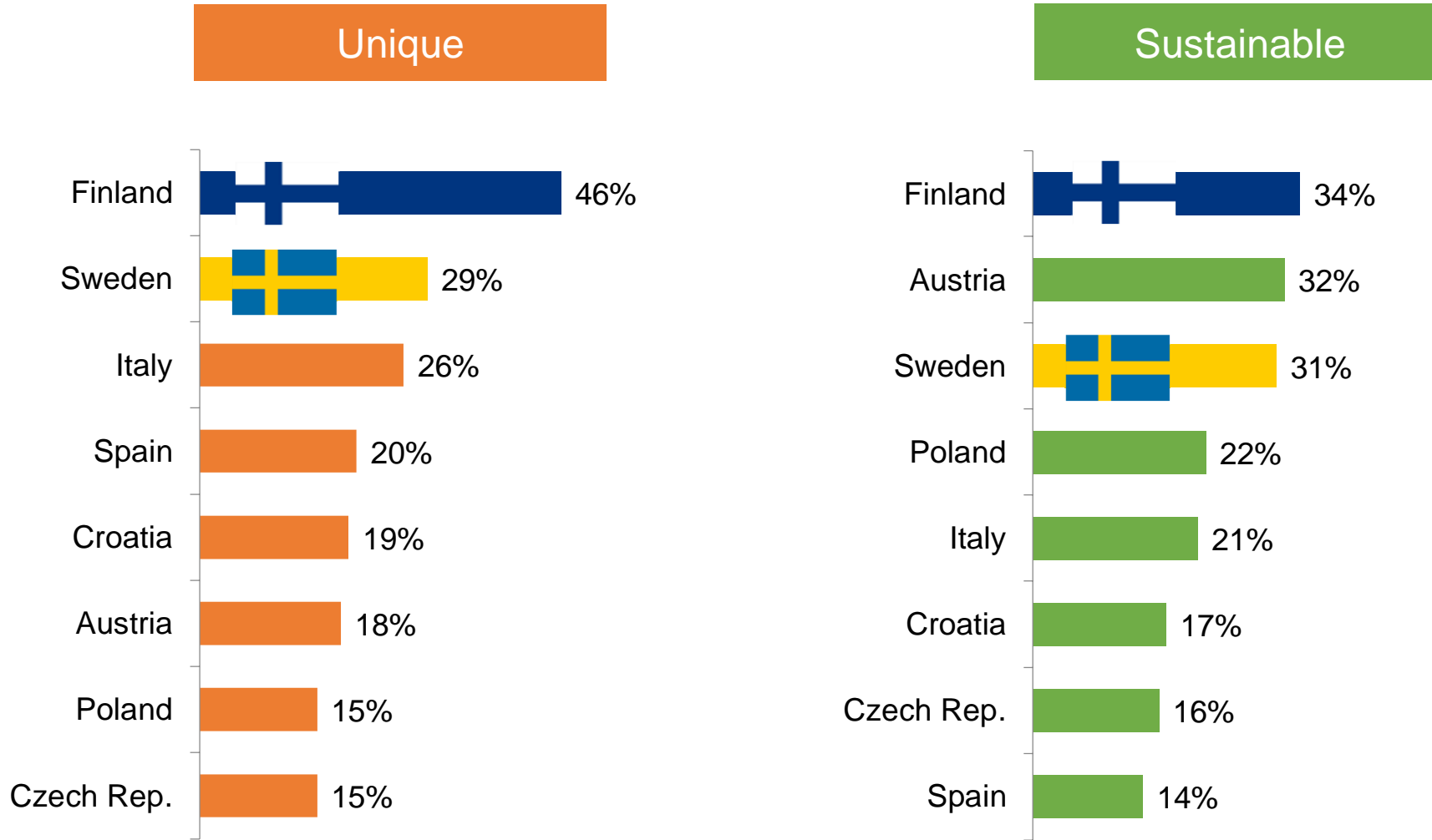
My holiday should be as socially acceptable as possible (i.e. fair working conditions and respect for the local population).

Sustainability in holiday travel: Trips to the BSR are already more sustainable

■ All holiday trips ■ ... to the Nordics



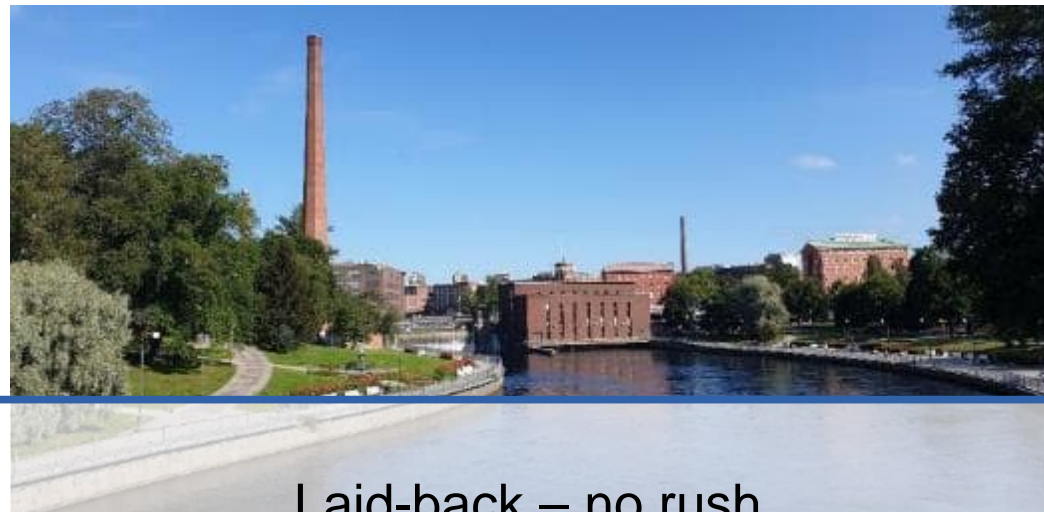
Destination Image: Ranking of destinations regarding the image criteria “unique” and “sustainable” destination



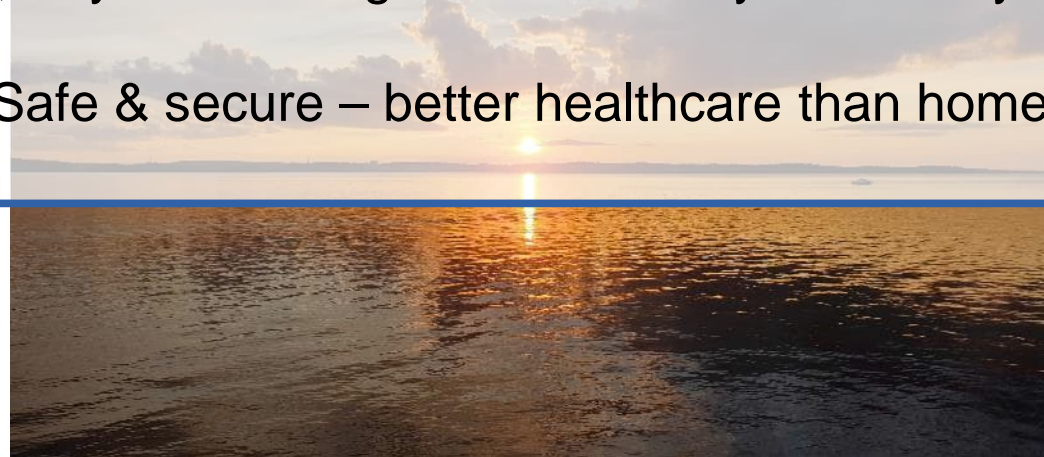
Question: “Sometimes, you can have a certain imagination about a destination, whether or not you have been there before. Can you tell me which of the characteristics on this list apply to ...?” Basis: German-speaking population 14+ years in Germany with an imagination of the respective destination; Source: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

Good reasons to travel to Finland

Good reasons to travel to Finland

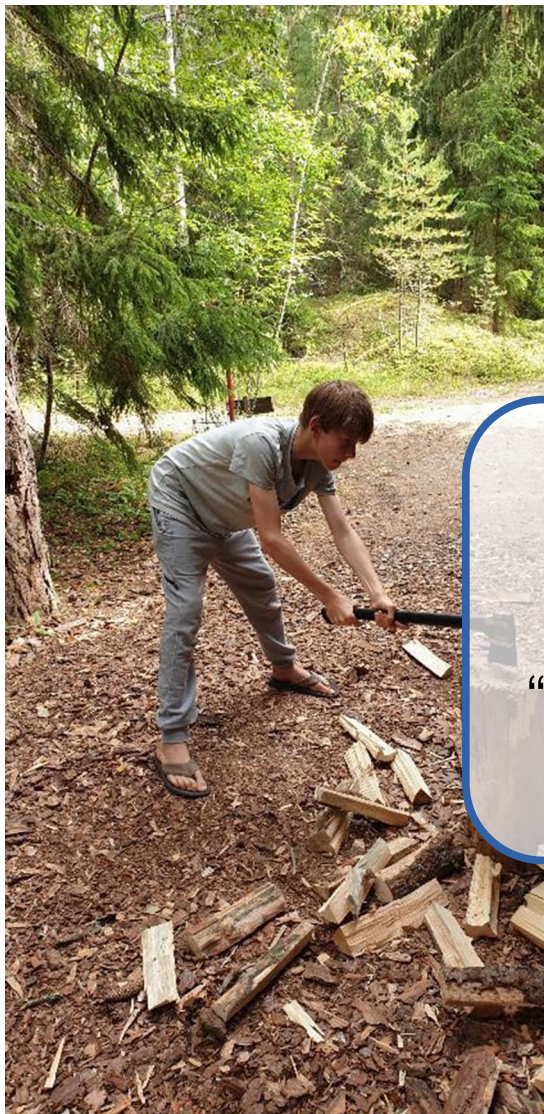


Laid-back – no rush
People nice, modest, interested:
„Why are coming to Finland for your holiday?”
Safe & secure – better healthcare than home!



Photos: Ulf Sonntag

Good reasons to travel to Finland



Mökki-holidays –
do nothing much and it feels just right
“That is the right Finnish way for a summer holiday”



Photos: Ulf Sonntag

Good reasons to travel to Finland



Photo: Ulf Sonntag

Things that need explanation

Mosquitos?

Too boring? Not spectacular enough?

Too cold? Bad weather?

Plumpsklos?



Photo: Ulf Sonntag

Go for it!

Call to action!

- Nordics perform well – but they by no means are outperforming the Mediterranean. Neither will they do in the foreseeable future.
- Don't count on climate change to do your job!
- You have such a great destination to sell.
- Work with what you have to offer and with what you know about your potential visitors.
- Create great Nordic Moments – then you create a Nordic Momentum according to your own rules!



Thank you &
let's stay in touch!

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