

Keski-Euroopan markkinakatsaus

23.1.2025

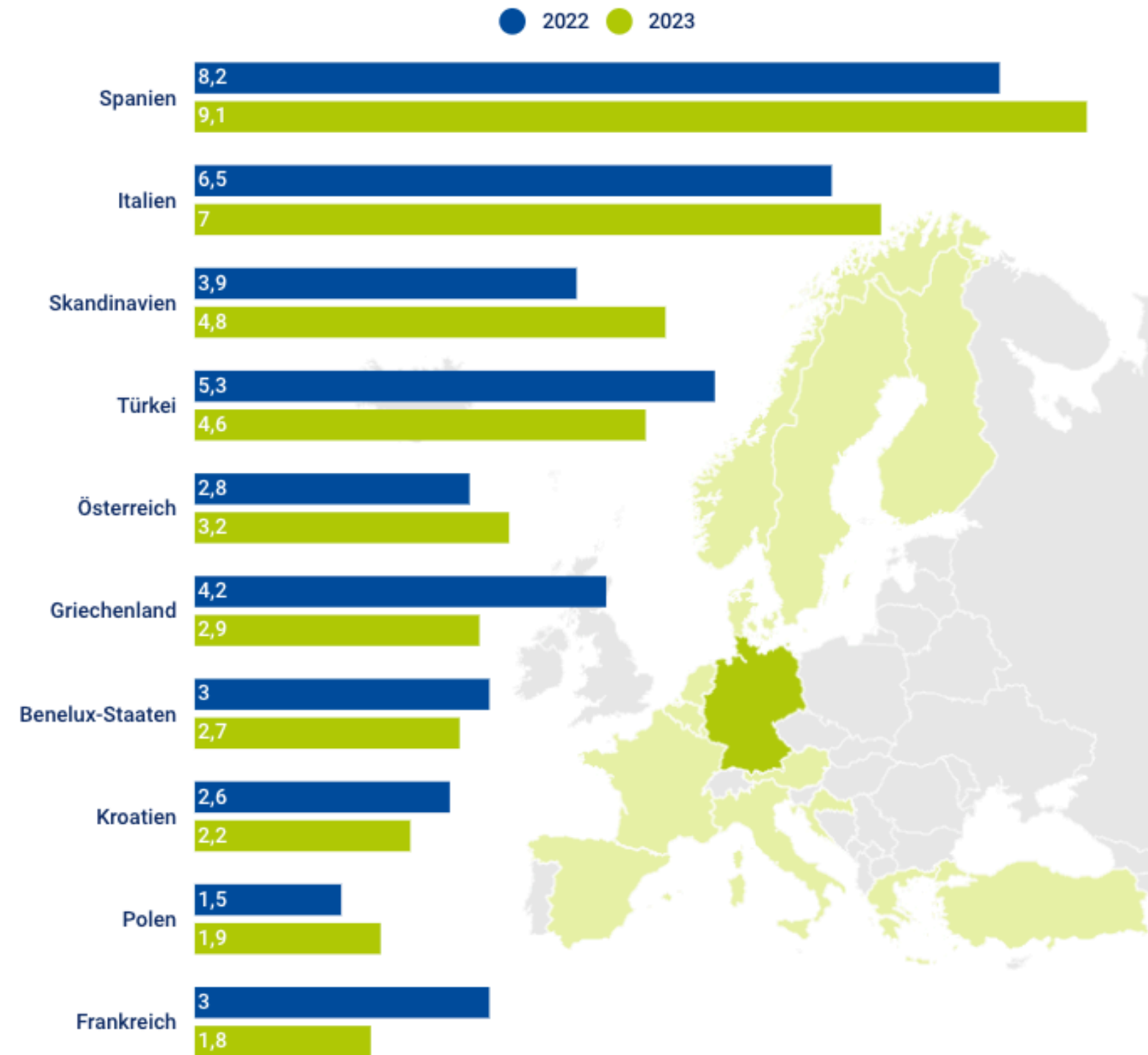
Jan Badur

Managing Director
NordicMarketing



Top 10 Europäische Reiseziele Skandinavien überholt Türkei

Von je 100 Reisenden wählten als Ziel für ihre Haupturlaubsreise:



Repräsentativbefragung von 3.000 Personen, ab 18 J. in Deutschland, Dez. 2023 / Jan. 2024
www.stiftungfuerzukunftfragen.de

Stiftung für
Zukunftfragen
Eine Initiative von BAT

“Skandinavien ohitti Turkin”

Norja, Ruotsi, Suomi, Tanska 2023

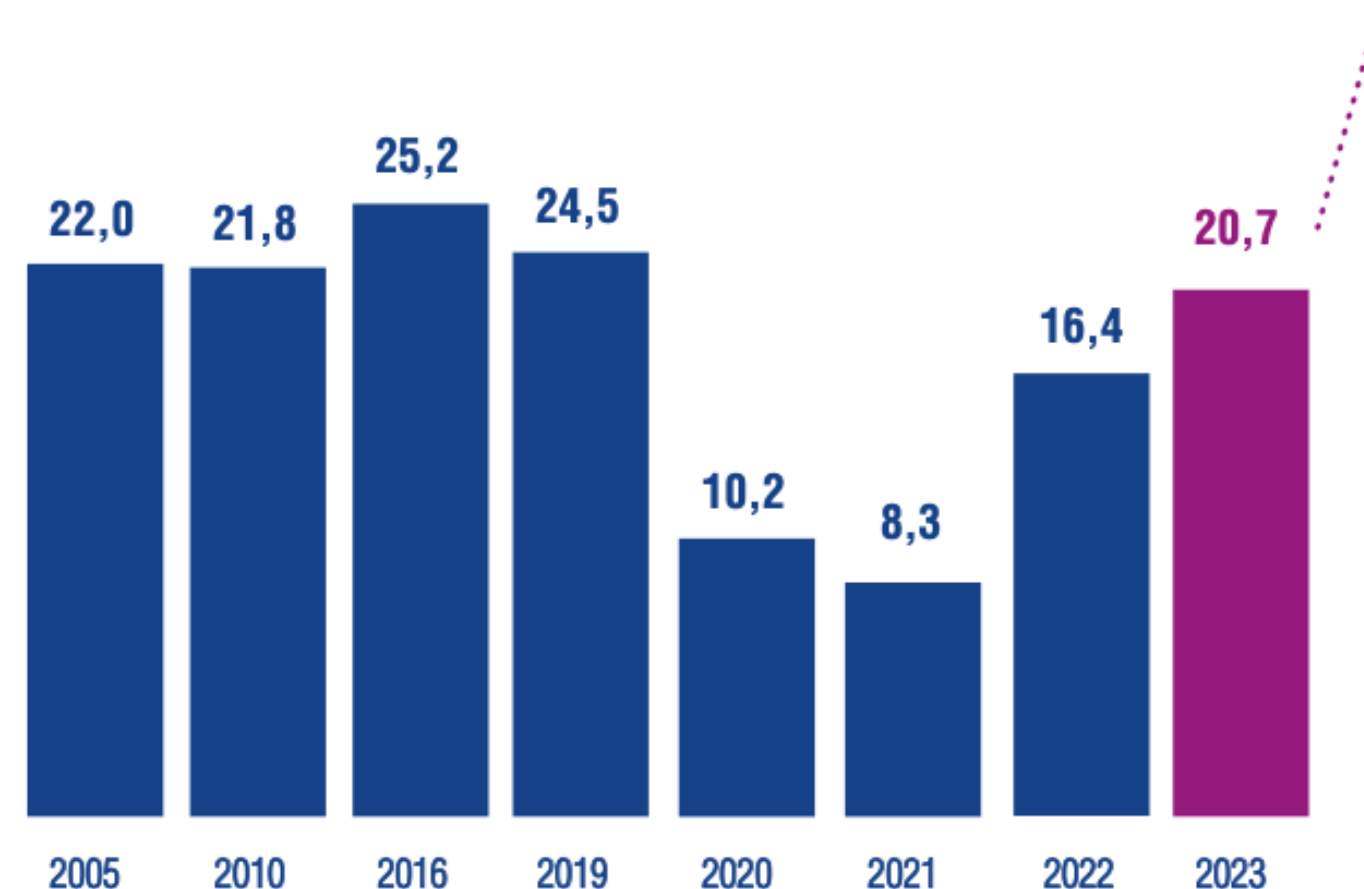


**NORDIC
MARKETING**

Saksan matkanjärjestäjien liikevaihto 2023 € 37,3 miljardia



Matkatoimistojen
(jälleenmyyjien)
liikevaihto 2023
€ 2,7 miljardia



NordicMarketing Data 2024

Tour Operators in Germany, Switzerland, Austria, Netherlands, Belgium & Luxembourg selling Norway, Sweden & Finland

Source: MarketCheck data by NordicMarketing, April 2024



Tour Operators		Norway	Sweden	Finland
824	German tour operators selling	703	652	584
106	Swiss tour operators selling	85	77	83
90	Austrian tour operators selling	78	74	70
191	Dutch tour operators selling	162	136	113
71	Belgian tour operators selling	58	45	50
8	Luxembourgish tour operators selling	7	8	7

Urlaubsreisende



54,6 Mio.

2022: 53,1 Mio.
2021: 47,8 Mio.
2020: 44,6 Mio.
2019: 55,2 Mio.

Urlaubsreisen



65,0 Mio.

2022: 67,1 Mio.
2021: 55,1 Mio.
2020: 50,5 Mio.
2019: 70,8 Mio.

Ausgaben bei
Urlaubsreisen



86,9 Mrd.

2022: 80,1 Mrd. €
2021: 56,0 Mrd. €
2020: 45,1 Mrd. €
2019: 73,1 Mrd. €

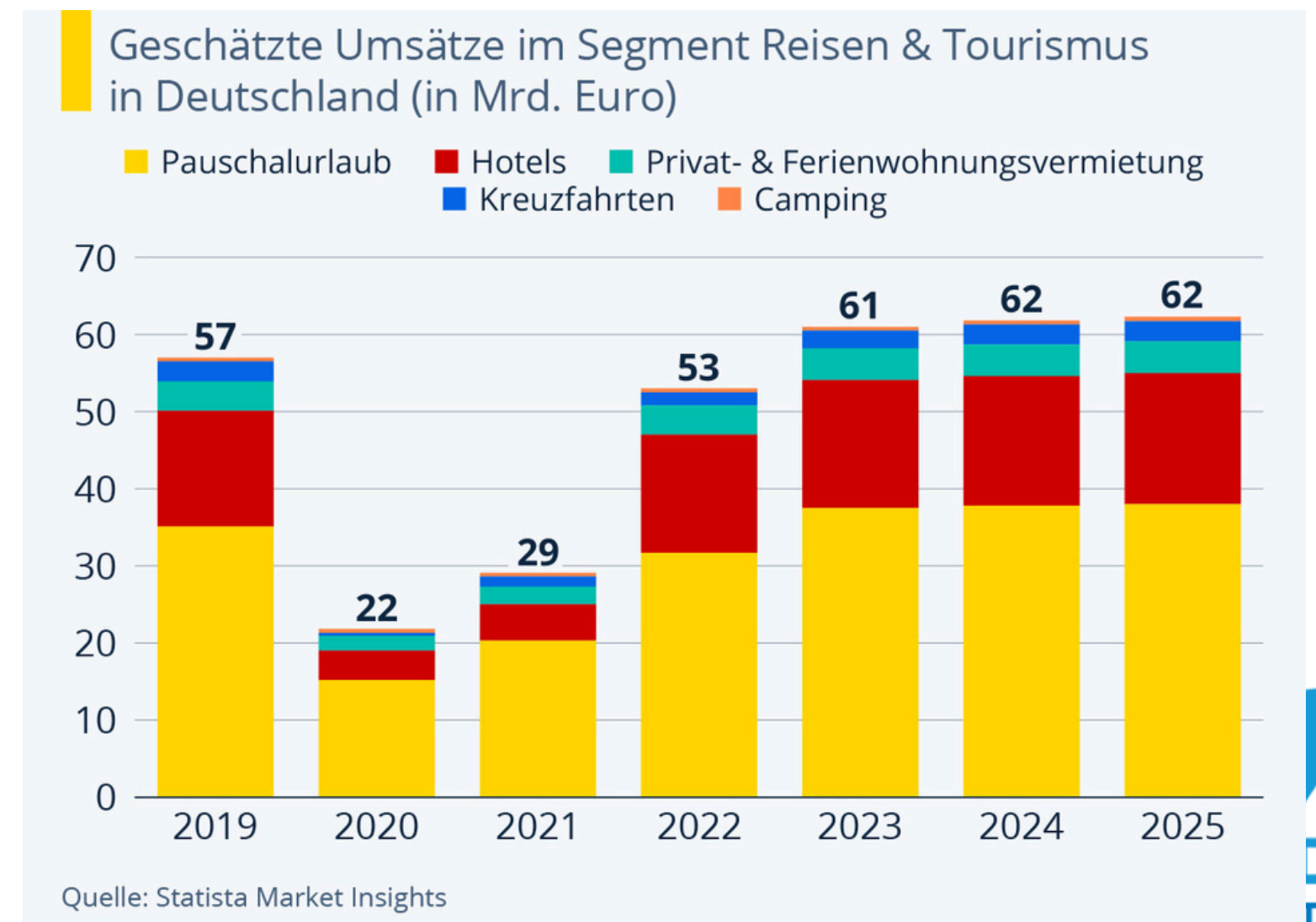
Basis: Deutschsprachige Bevölkerung, ab 14 Jahren in Deutschland - Urlaubsreisen 2023 ab 5 Tage Dauer
Quelle: RA 2024

Kulut lomamatkoihin vuonna
2023 - uusi ennätys:
86,9 miljardia euroa
(2019: 73,1 miljardia euroa)

Source: F.U.R. Reiseanalyse, Statista

Matkailun arvioitu liikevaihto miljardeissa euroissa - pakettimatkoja tarvitaan.

Pakettilomat (keltainen), Hotellit (punainen), Yksityiset ja loma-
asunnot (vihreä), Risteilyt (sininen), Leirintäalueet (oranssi).



DACH: matkailija Pohjoismaihin

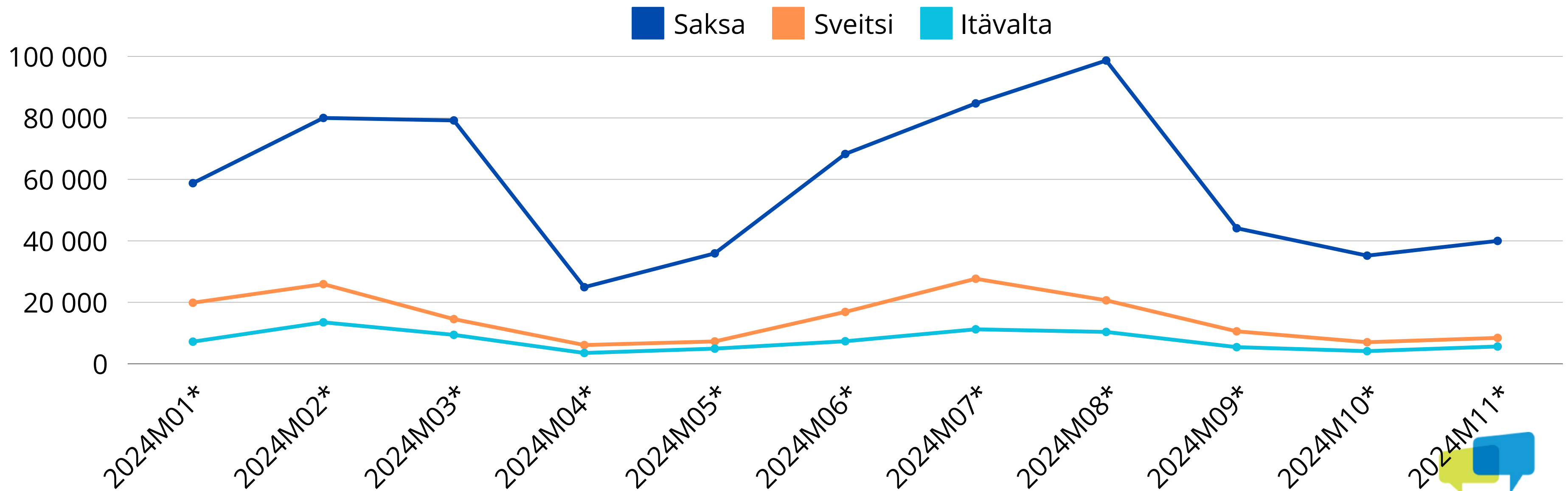
- Hyvin koulutettu, varakas
- Kokeneet matkailijat
- Tiukka rahankäyttö, valmis maksamaan laadusta
- Vaativat - odottavat laatua ja hyvää palvelua
- **Etsivät aitoja kokemuksia - paikallinen kulttuuri, tunnelma, ympäristö**
- Motivaatio: luonto, eläimet, ulkoilma-aktiviteetit
- Palvelut yksilöille, valinnaisia tuotteita ja aktiviteetteja tarvitaan
- Ei massaturismia
- Yhä enemmän kestäväää matkailua ja palveluita



DACH 2024

Overnights in 2024 in Finland

Kuukausittaiset yöpymiset ja saapuneet asuinmaittain muuttujina Alue, Asuinmaa, Tiedot ja Kuukausi

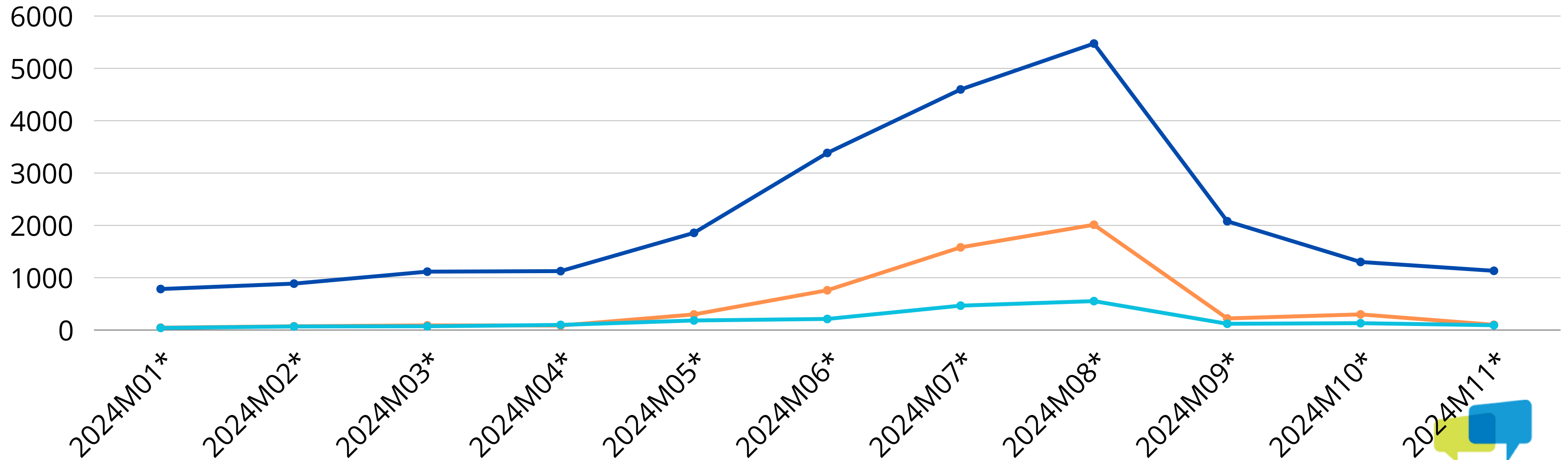


DACH 2024

Overnights in 2024 in Varsinais-Suomi

Kuukausittaiset yöpymiset ja saapuneet asuinmaittain muuttujina Alue, Asuinmaa, Tiedot ja Kuukausi

■ Saksa ■ Sveitsi ■ Itävalta



Source: Tilastokeskus

Kesälomat Saksassa

Deutschland	84 669 326
Baden-Württemberg	11 339 260
Bayern	13 435 062
Berlin	3 782 202
Brandenburg	2 581 667
Bremen	691 703
Hamburg	1 910 160
Hessen	6 420 729
Mecklenburg-Vorpommern	1 629 464
Niedersachsen	8 161 981
Nordrhein-Westfalen	18 190 422
Rheinland-Pfalz	4 174 311
Saarland	994 424
Sachsen	4 089 467
Sachsen-Anhalt	2 180 448
Schleswig-Holstein	2 965 691
Thüringen	2 122 335

Sommerferien 2024

Vom 29. bis 31. Juli sind in allen Bundesländern gleichzeitig Sommerferien

20. Juni

9. Sept.

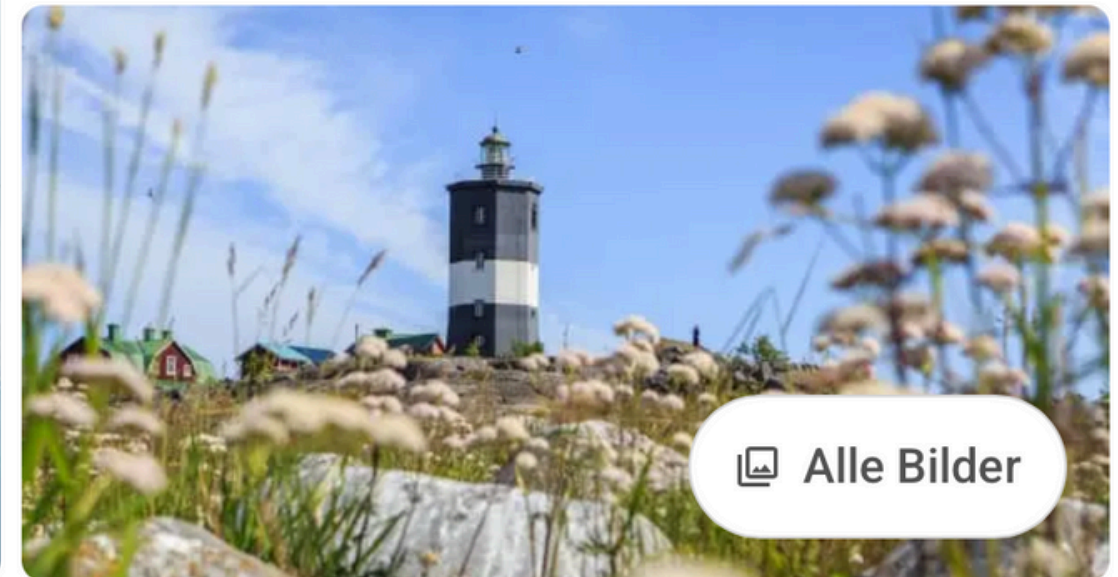


info.BILD.de | Quelle: schulferien.org | Einzelne Schulen können abweichen

Quelle: Ergebnisse der Bevölkerungsforschung auf Grundlage des Zensus



BUCKETLIST



Alle Bilder

< Zu allen Finnland Reisen

8 Tage
Schweden & Finnland
ab 1.099 €

10 Tage
Schweden & Finnland ...
ab 1.499 €

Schweden & Finnland: Küstenhopping im Ostsee-

★ 4.4

p.P. ab **1.099 €**

Reise anpassen & buchen

Höhepunkte

- 📍 Stockholm
- 📍 Turku
- 📍 Vaasa
- 📍 Umeå
- 📍 Sundsvall

Enthalten

- 📅 8 Tage
- 🏠 7 Übernachtungen
- ✈️ Flug und Gepäck
- 🚗 Mietwagen

Roadtrip zum bunten Mosaik der Schäreninseln!

- ✔️ **Schwedens Naturschönheiten**
Zwischen Schäreninseln, Sandstränden & Nationalparks
- ✔️ **Coast to Coast**
Küstenhopping mit Fährfahrten zwischen Schweden & Finnland
- ✔️ **Roadtrip Abenteuer**
Mit dem Mietwagen entlang des Bottnischen Meeres

★ 4.4

p.P. ab **1.099 €**

[Reise anpassen & buchen](#)

Warum bei uns buchen?

- ✓ Kostenlose Stornierung
- ✓ Reisen anpassbar
- ✓ 24/7 Support

[📄 Angebot teilen](#)

ab 1.099 €

ab 1.499 €

Reise impassen anfragen



TAG 3

Turku: Mittelalter Vibes & Inselglück

Noch bevor die Fähre anlegt, wecken dich die ersten Sonnenstrahlen und das sanfte Schaukeln erinnert dich daran, dass du die Nacht auf dem Meer verbracht hast. Und nur kurz darauf heißt es: Land in Sicht und willkommen in Turku!...

[Details](#)



TAG 4

Kvarken Archipel: Endloses Mosaik aus Wasser & Land

Du kannst es kaum noch erwarten, mehr von Finnland zu sehen? Dann nimm das Steuer in die Hand und tritt aufs Gaspedal – es geht nach Vaasa. Schon nach wenigen Minuten ist dir klar: heute ist der Weg das Ziel! Die Sonne lässt das gelbe Band aus...

[Details](#)

Sneak Peek

Schweden und Finnland – das Beste, was Skandinavien zu bieten hat! Bist du bereit, gleich zwei Häkchen auf deiner Bucketlist zu setzen? Dann nichts wie los! Das Bottnische Meer steht dir als Roadtrip-Kulisse bereit und bringt dich der wilden, ursprünglichen Natur näher als je zuvor: Entdecke Jahrhunderte alte Kiefern in den dichten Wäldern vor den Toren Stockholms und hüpf von Insel zu Insel im bunten Mosaik des finnischen Schärenmeers. Tritt aufs Gaspedal, wenn nichts vor dir liegt als die endlose Weite, lasse dich vom jungen, hippen Flair Umeås im Norden Schwedens treiben und erkunde die Wildnis, die die Stadt umgibt. Wandere über schmale Pfade durch das duftende Grün der Wälder vorbei an glasklaren Seen und erkunde die Berge Sundsvalls.. Nirgendwo kannst du die Naturverbundenheit so spüren wie hier! Also worauf wartest du noch?



Erlebnisse

Wähle ein Abflugdatum

ab Günstigster
ab 1.099 €

ab Frankfurt
ab 1.239 €

ab Berlin
ab 1.099 €

ab München
ab 1.209 €

ab Hamburg
ab 1.099 €

Alle
Flughäfen



Mai 2025

Juni 2025



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1
1.439 €

2
1.449 €

3

4

1
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5

6
1.429 €

7
1.399 €

8
1.479 €

9
1.399 €

10
1.499 €

11
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2
1.369 €
~~1.469 €~~

3
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4
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12
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~~1.359 €~~

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~~1.479 €~~

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1.549 €

Reiseroute

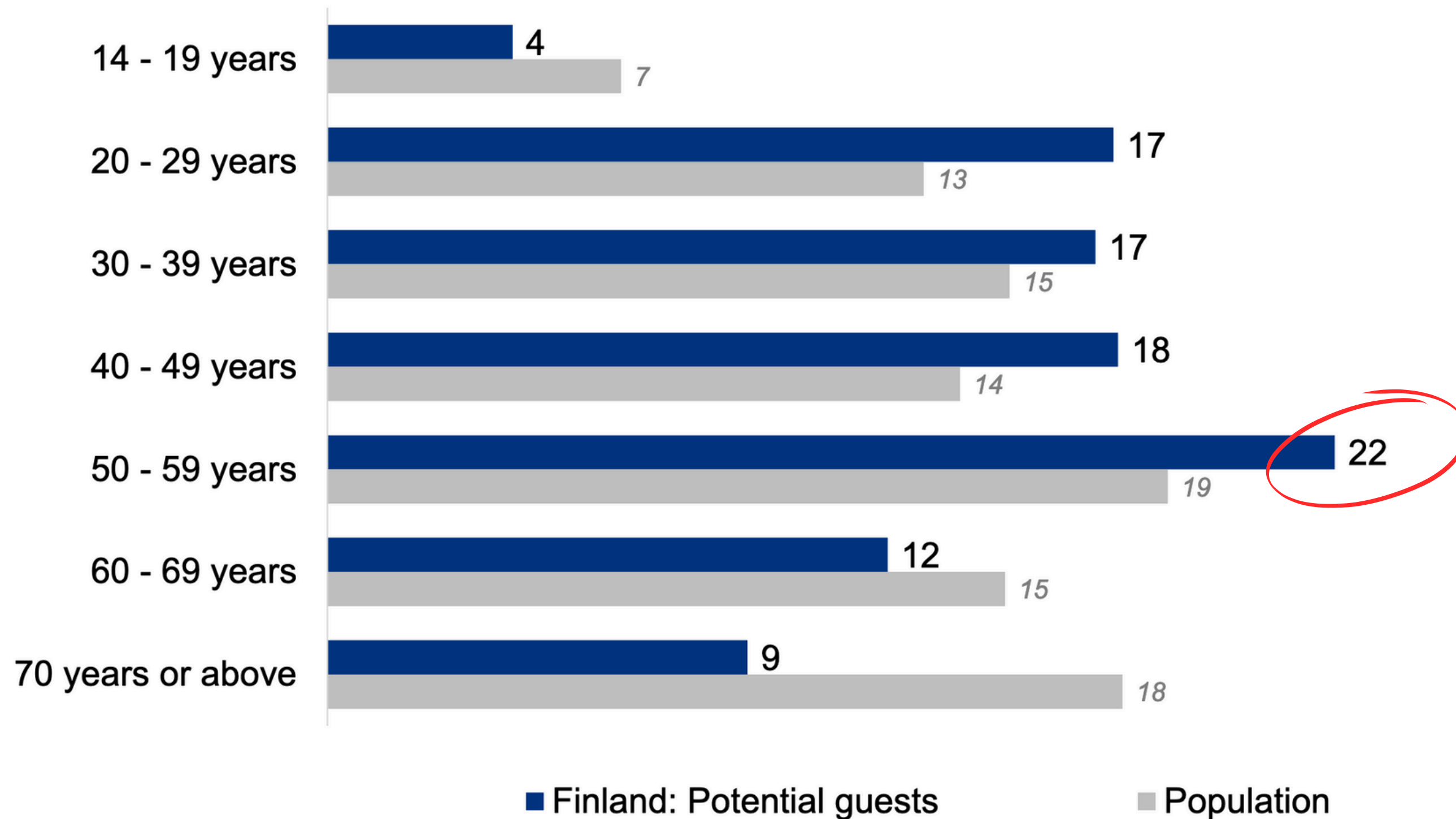


Visit Finlandin toimeksiannosta: "Reiseanalyse"



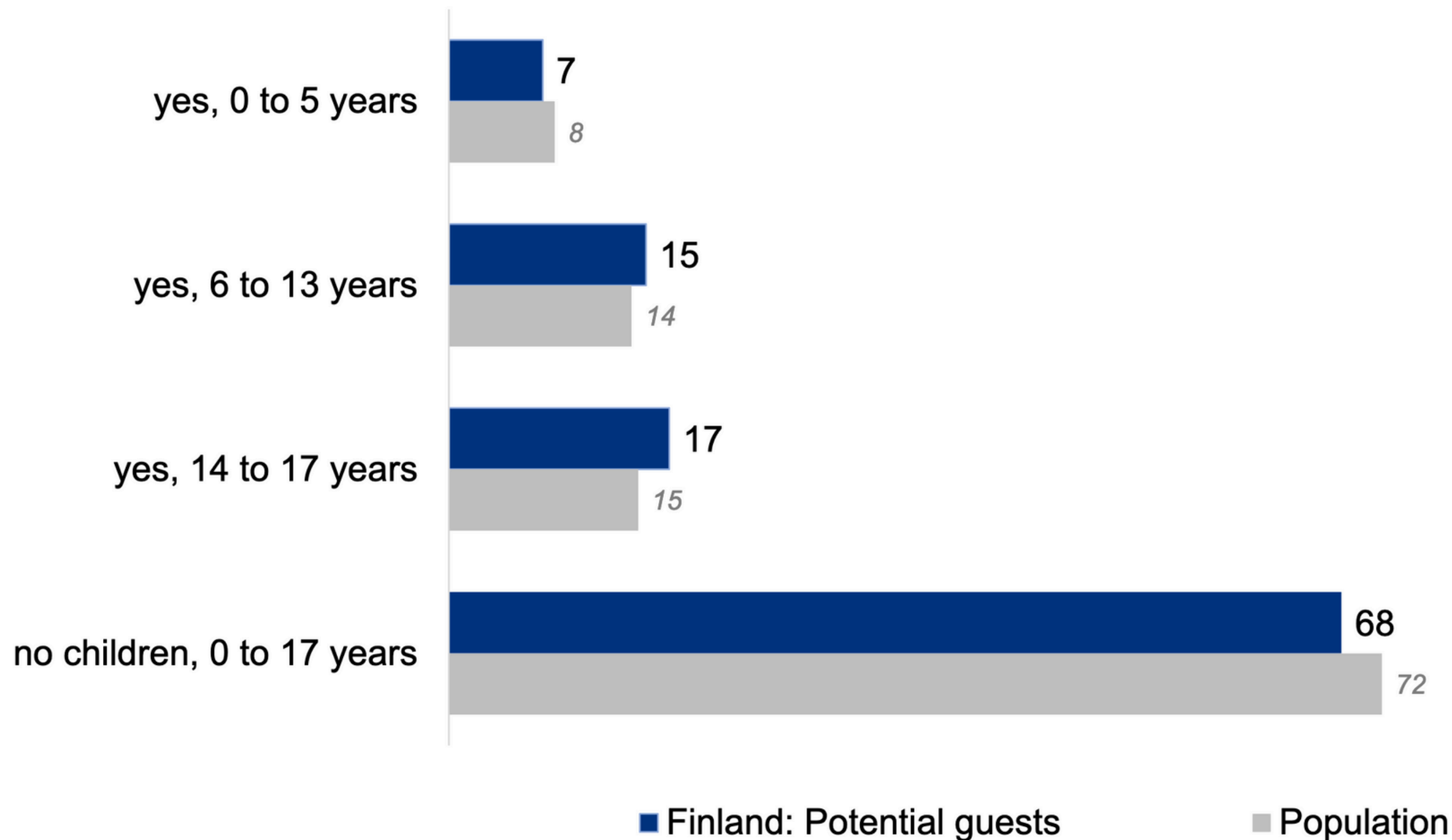
Potential guests to Finland 2024-2026: Age

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.

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.

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

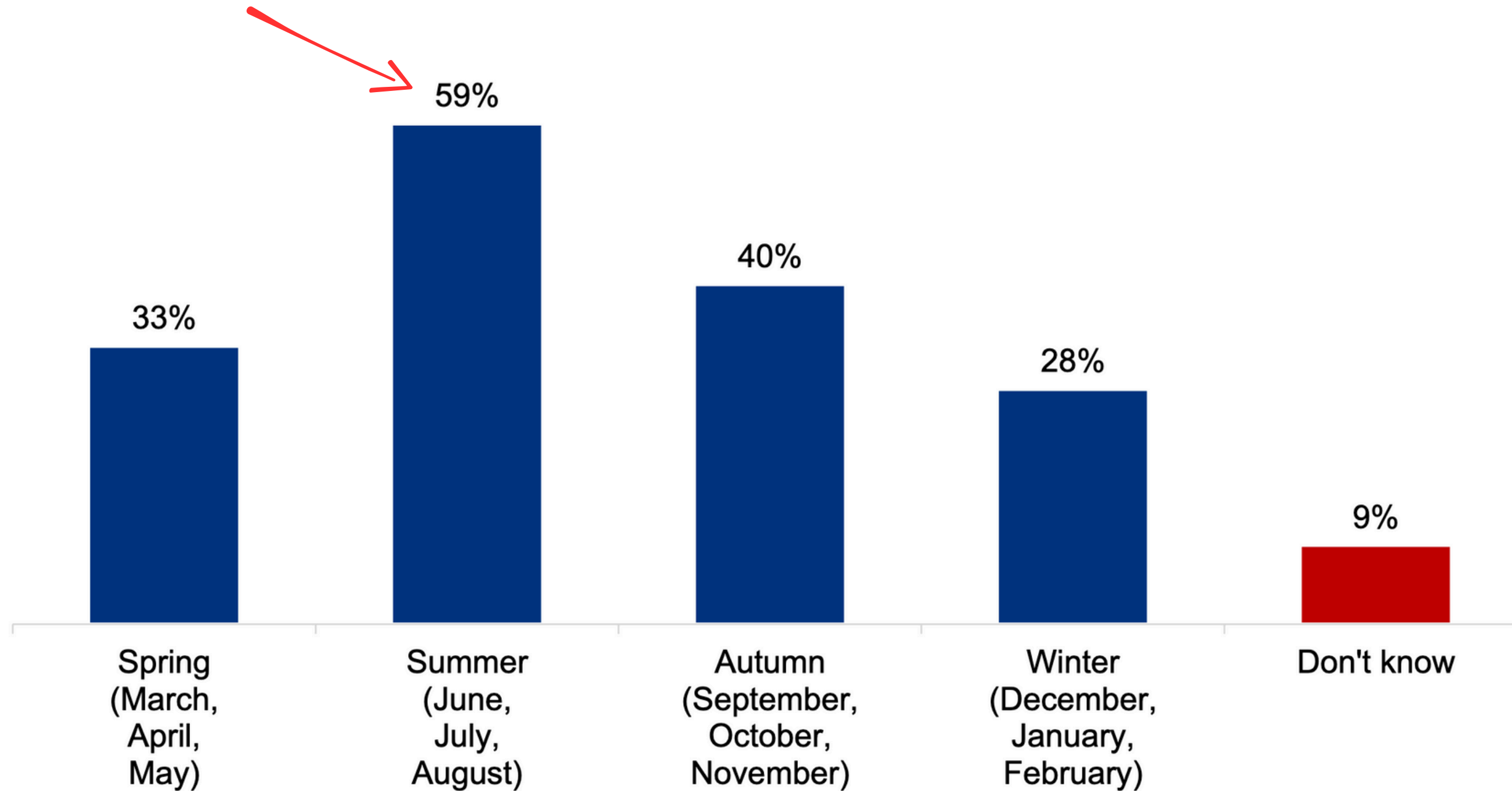


- » When asking the potential guest to Finland about what they want to experience on a trip to Finland, we see again the dominance of nature.
- » But after nature, we see a variety of aspects like regional food and beverages, sightseeing or getting to know the local tradition and lifestyle.
- » Compared 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.

Immerse yourself in life at the holiday destination

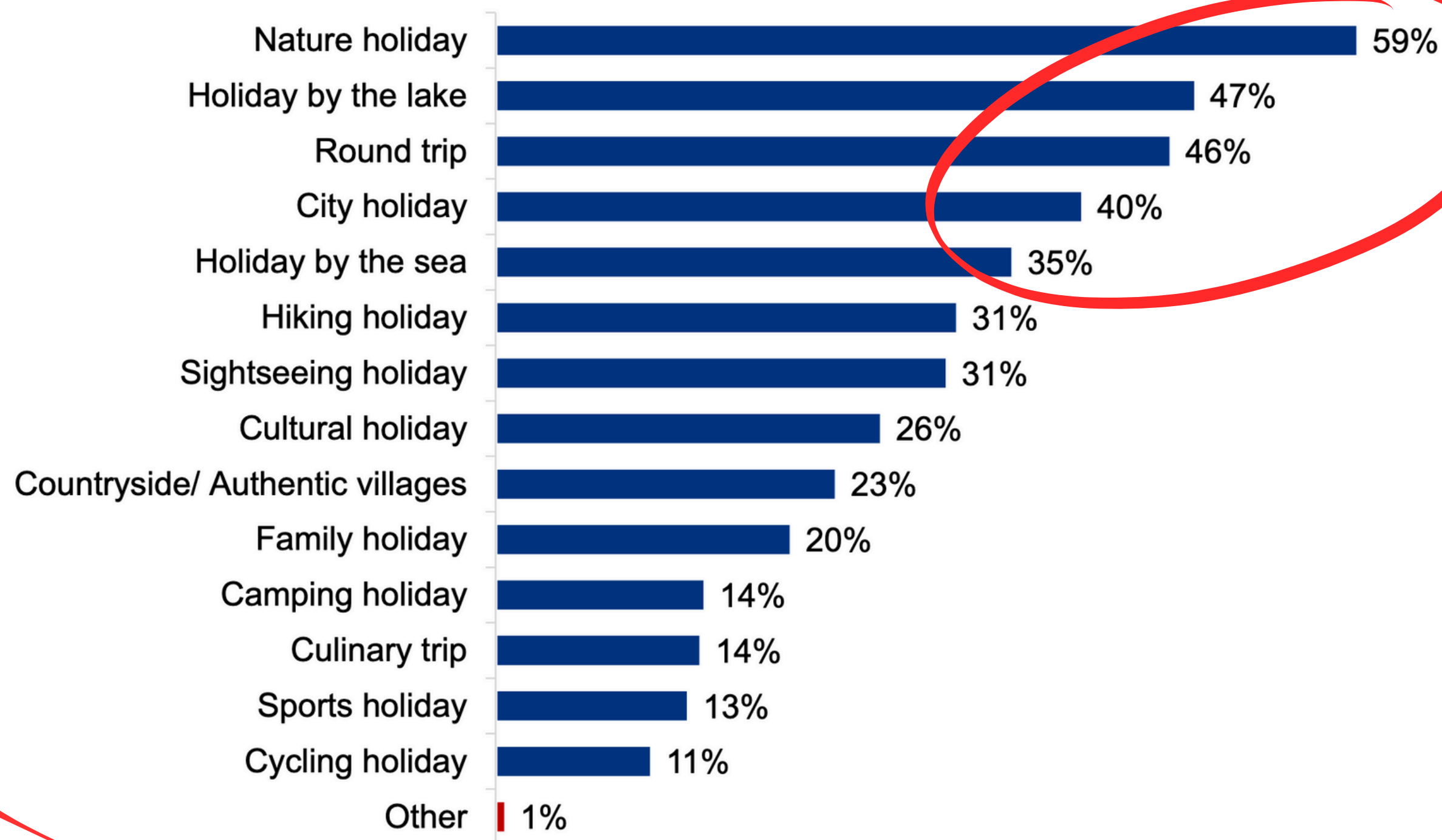
F3a: What would you particularly like to experience in Finland during future holiday trips? Please select all that apply; in %
 Basis: Finland Potential 2024 (n= 718); Finland Potential 2021 (n=1,361)
 Source: Finland Ad-hoc-survey 2024 by FUR/NIT; RA online 11/2020

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.

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

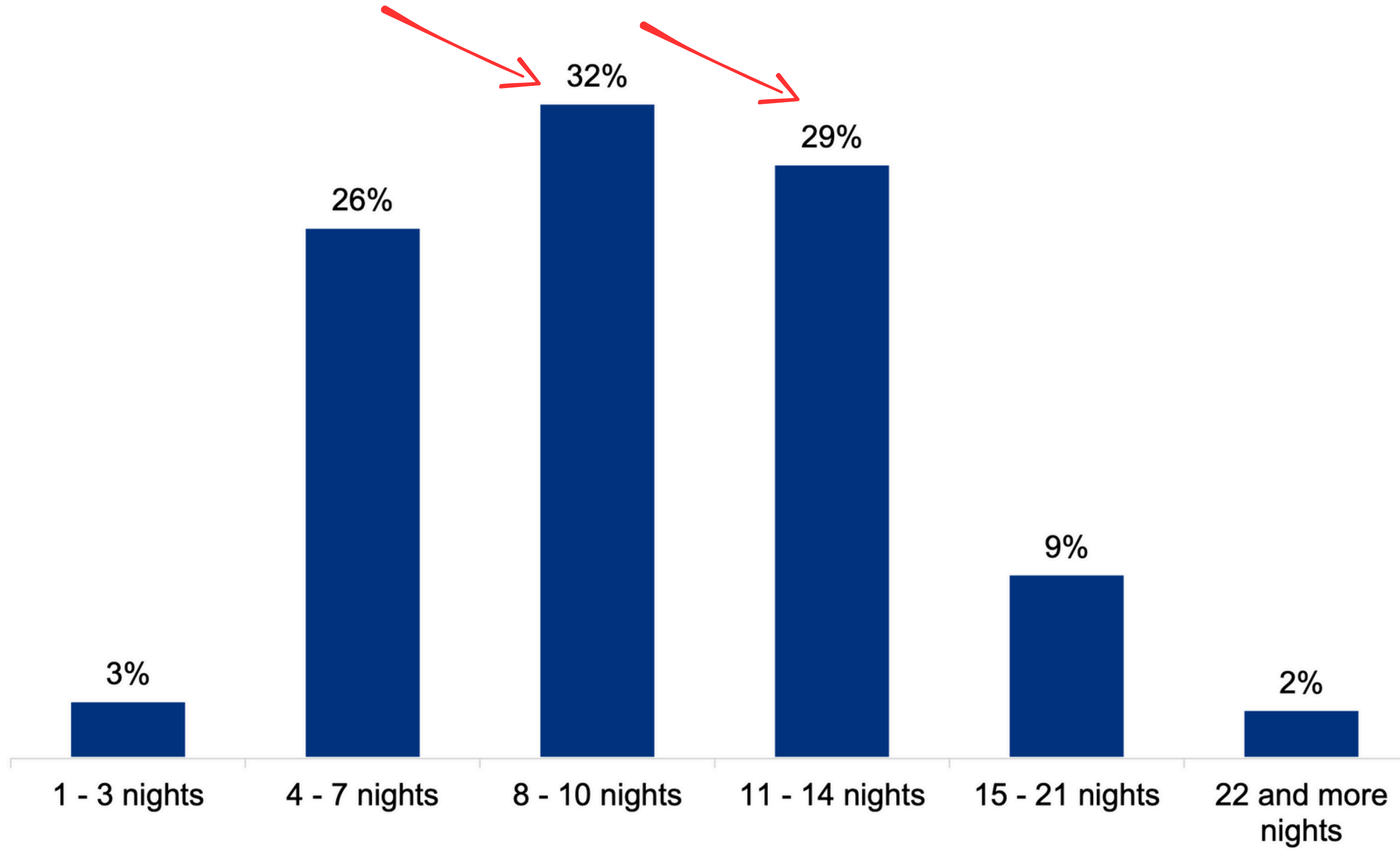


- » Here we show what kind of holidays the potential guests would like to spend in Finland.
- » The top three holiday types are: nature holidays, holidays by the lake and round trips.
- » Holiday types such as culinary trips, sports holidays or cycling holidays are quite small segments within the potential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

Duration of trip:

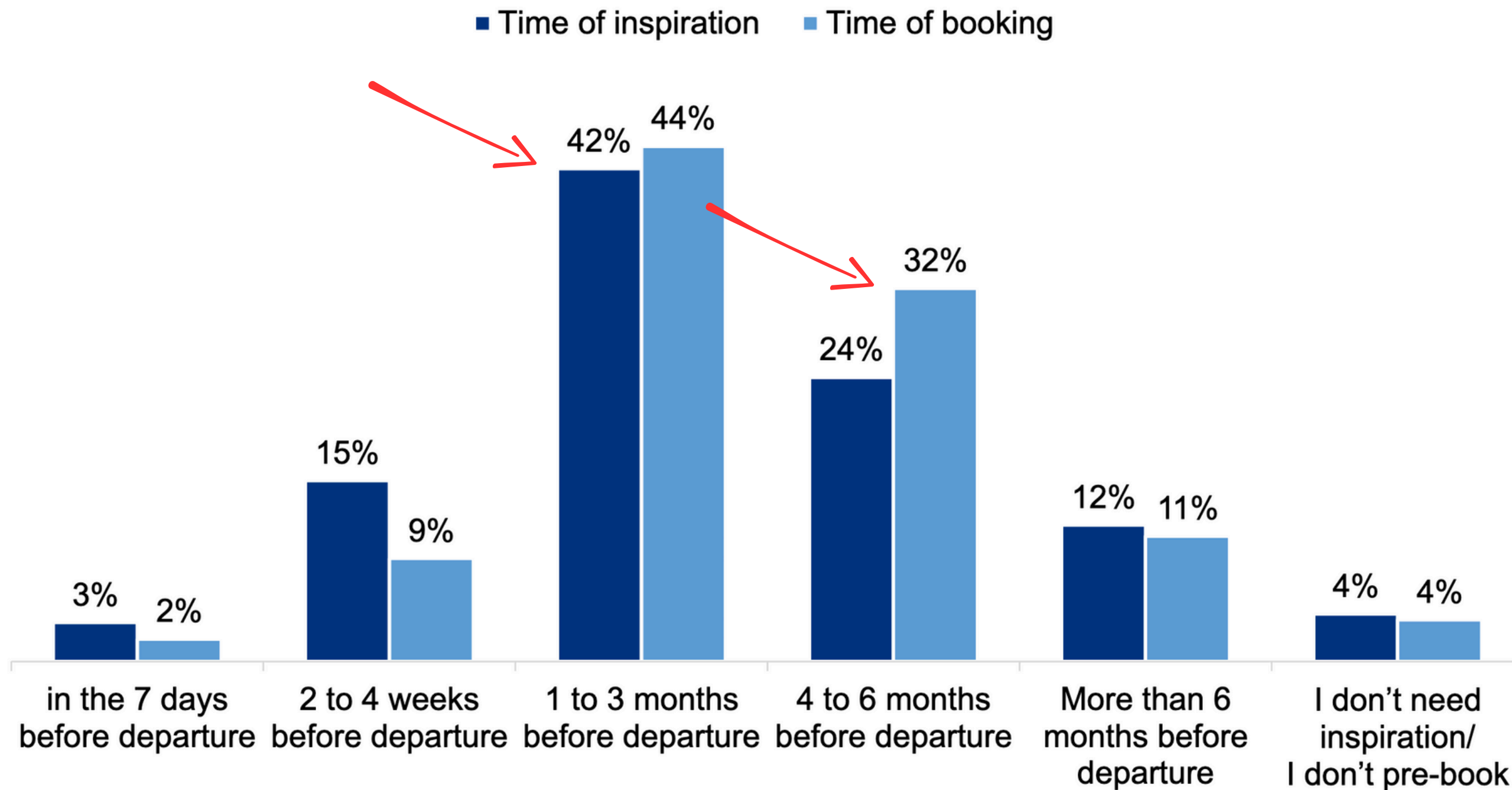
The vast majority would like to stay 1-2 weeks in Finland



- » 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

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

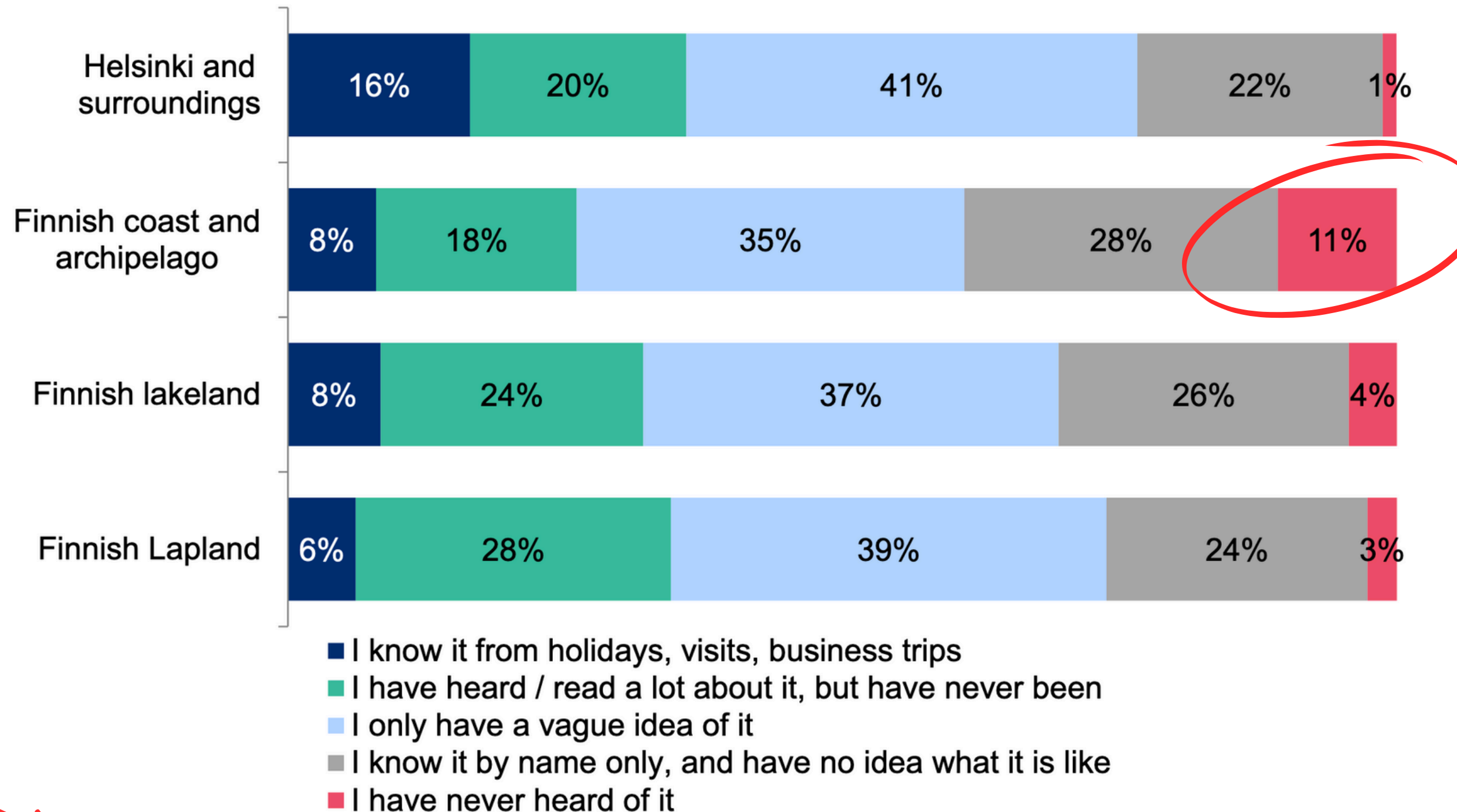


- » 12% of the potential guests to Finland would start looking for inspiration and 11% would already book their summer holiday more than 6 months before departure.
- » The most people would look for inspiration (42%) and book the holiday trip (44%) 1 to 3 months before departure.

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

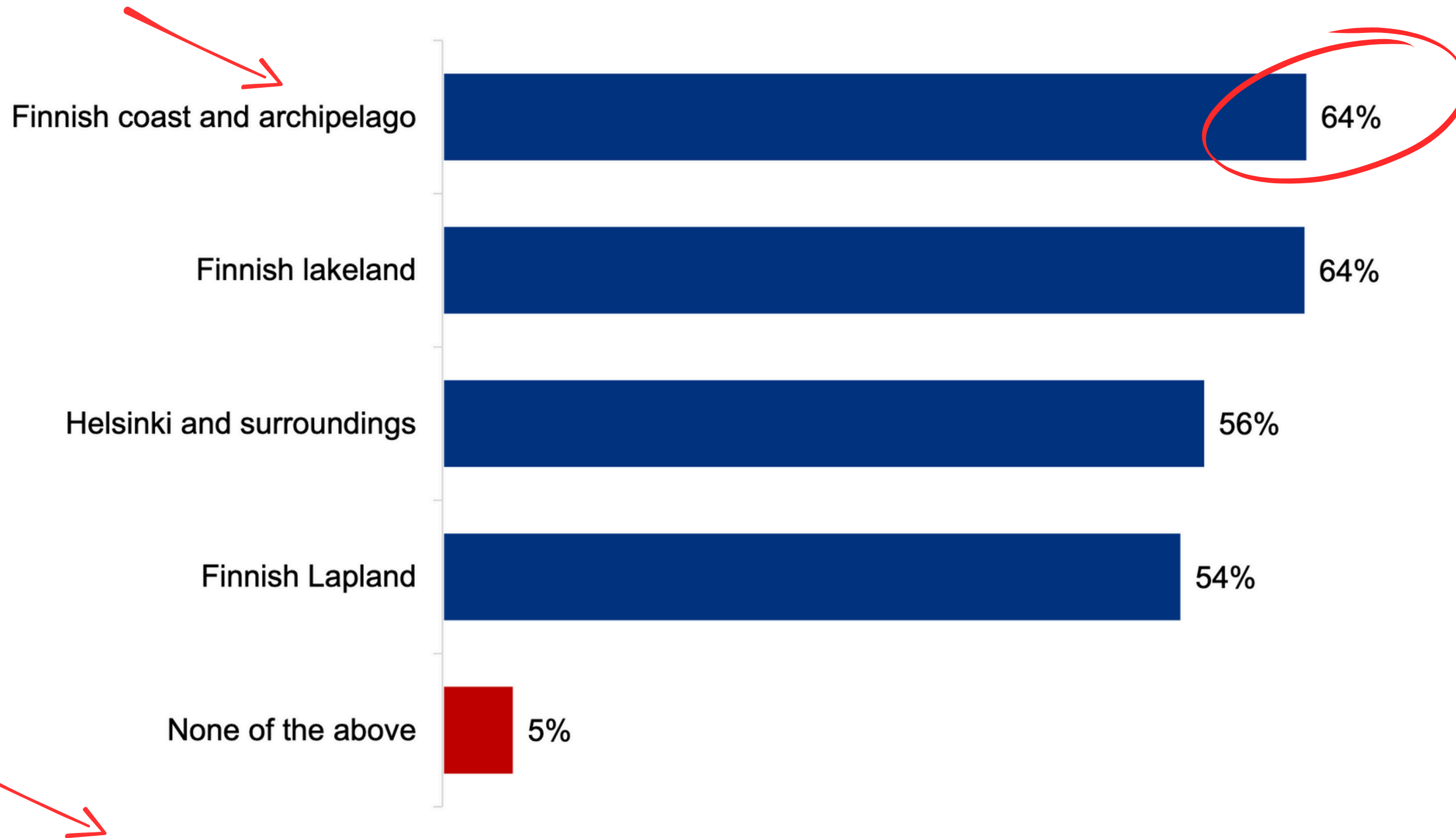
Awareness of Finnish Destinations: Helsinki & surroundings are well known, 11% have not heard of the Finnish archipelago



- » 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

Tuotteesi DACH-markkinoille

- **Autenttinen, paikallinen**
- 3-7 yötä
- Paikallinen elämäntapa, paikallinen ruoka, paikallinen arkkitehtuuri, museot, kansallispuistot
- Ulkoilma-aktiviteetit, multiaktiviteettiviikot
- Yksilöllisyyden huomioiminen, valinnaiset ohjelmat, tuotemoduulit
- Ei massaturismia
- Laatu
- Vastuullinen, ekologinen
- Hinnoittelu ulkomaisia markkinoita ja jakelua varten (komissio / matkanjärjestäjien hinnat).



Kiitos!

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