



NORDIC DESTINATIONS IN TRAVELLERS' MINDS: AWARENESS ACROSS MARKETS AND CITY BRAND INSIGHTS

Presentation of selected findings from Destination Brand 25

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Hamburg, 12 May 2026

Destination Brand – inspektour



inspektour
TOURISM AND MARKET RESEARCH

WHAT CAN YOU EXPECT TODAY?

DESTINATION BRAND 25 at a glance

Presentation of selected findings: Nordic destinations in travellers' minds

- Unsupported / top-of-mind awareness of Nordic destinations across 10 source markets
 - Supported city brand results in Germany vs UK
- Main reasons to visit Nordic cities among those willing to visit

Implications for destination marketing

Q&A

DESTINATION BRAND 25 at a glance:

The BrandValue+ and TravelIntent+ of tourist destinations

DESTINATION BRAND 25 – at a glance

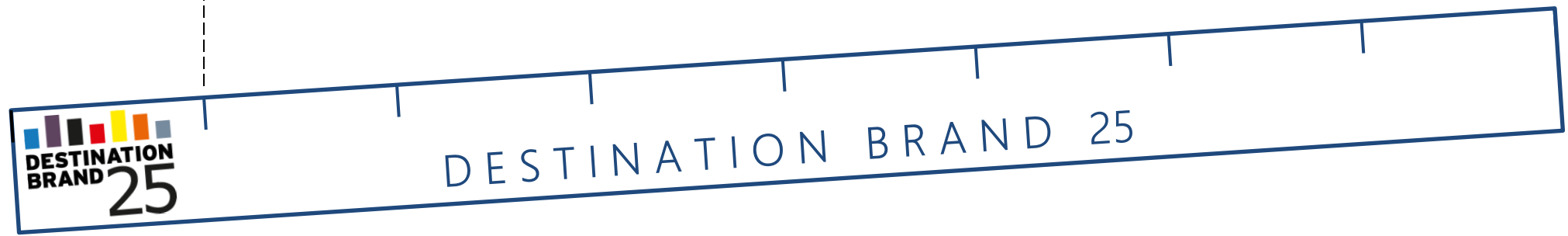
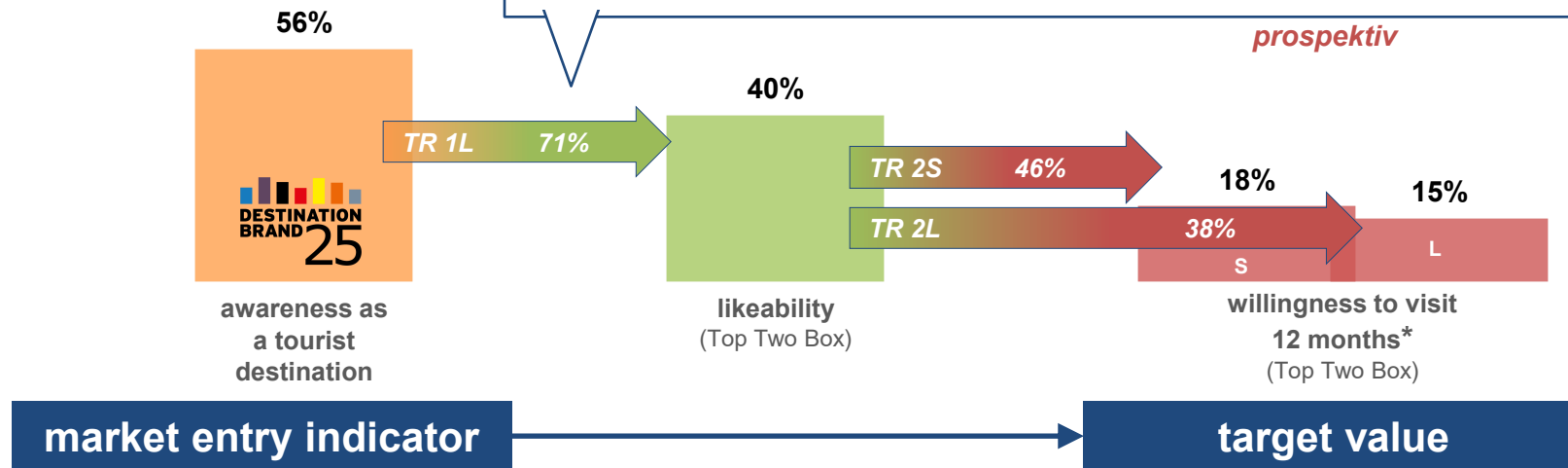
Process setpoints:

These figures indicate the proportion of respondents who reach each stage of the funnel. In this example, 56% of respondents are aware of the destination brand.

Transfer rates (TR):

Indicates the proportion that moves from one stage of the funnel to the next. In this example, 71% of those who are familiar with the destination also find it likeable.

Basic module:
BrandValue+



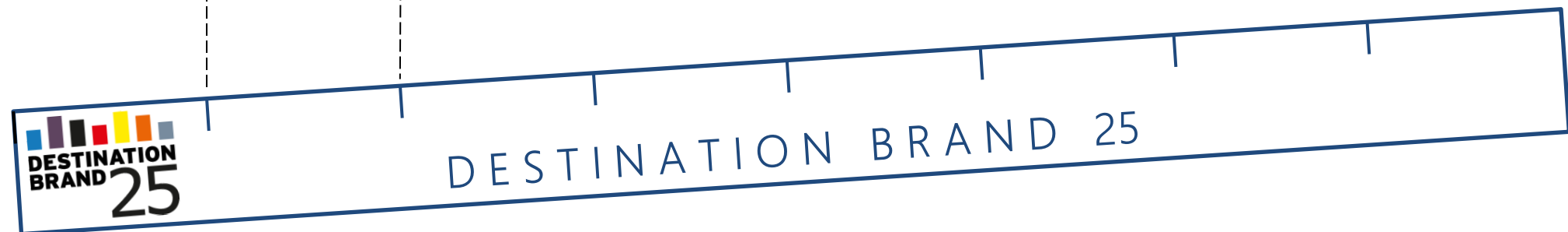
DESTINATION BRAND 25 – at a glance

**Basic module:
BrandValue+**

**Additional module:
TravelIntent+**

Classification of potential visitors by destination:

- Interest in holiday activities
- Relevance of holiday motivations/needs
- Relevance of experiential offerings
- Use and frequency of sources of inspiration
- Sociodemographics
- Standard target groups



DESTINATION BRAND 25 – at a glance

**Basic module:
BrandValue+**

**Additional module:
TravelIntent+**

Representative of the
local population aged
between
14 to 74 years

Source market DE:
Target group analysis
according to BeST
holidaymaker types +
SINUS milieus

10 source markets

> 170
Tourist
destinations

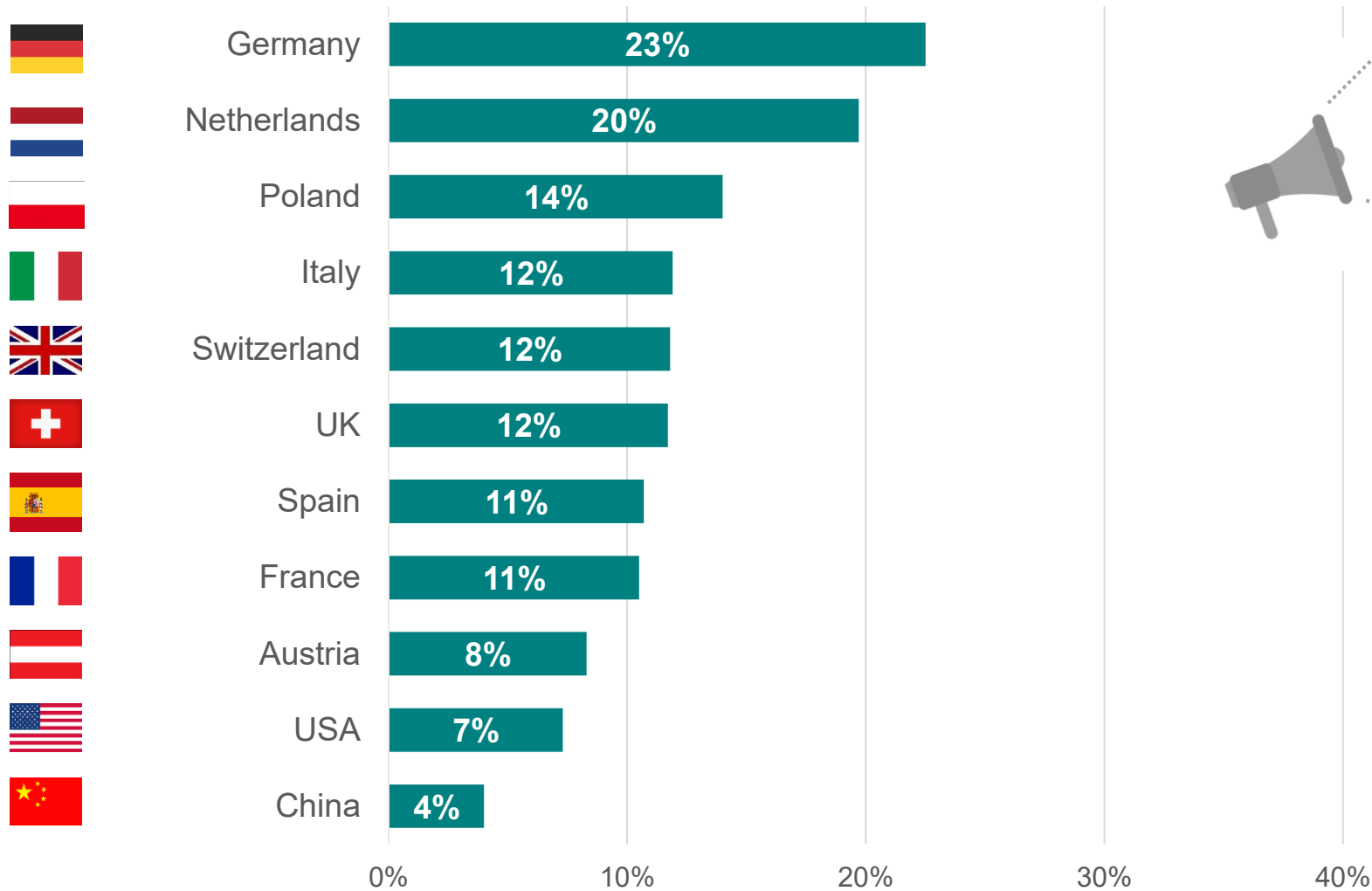
Online survey
Field work: Oct. till Dec. 25



Nordic destinations in travellers' minds

Unsupported awareness / top of mind

Sum of Top of Mind mention shares of Nordic destinations in % of respondents per source market



Question:
Which international tourist destinations come to your mind when you think about a holiday trip with at least one overnight stay?

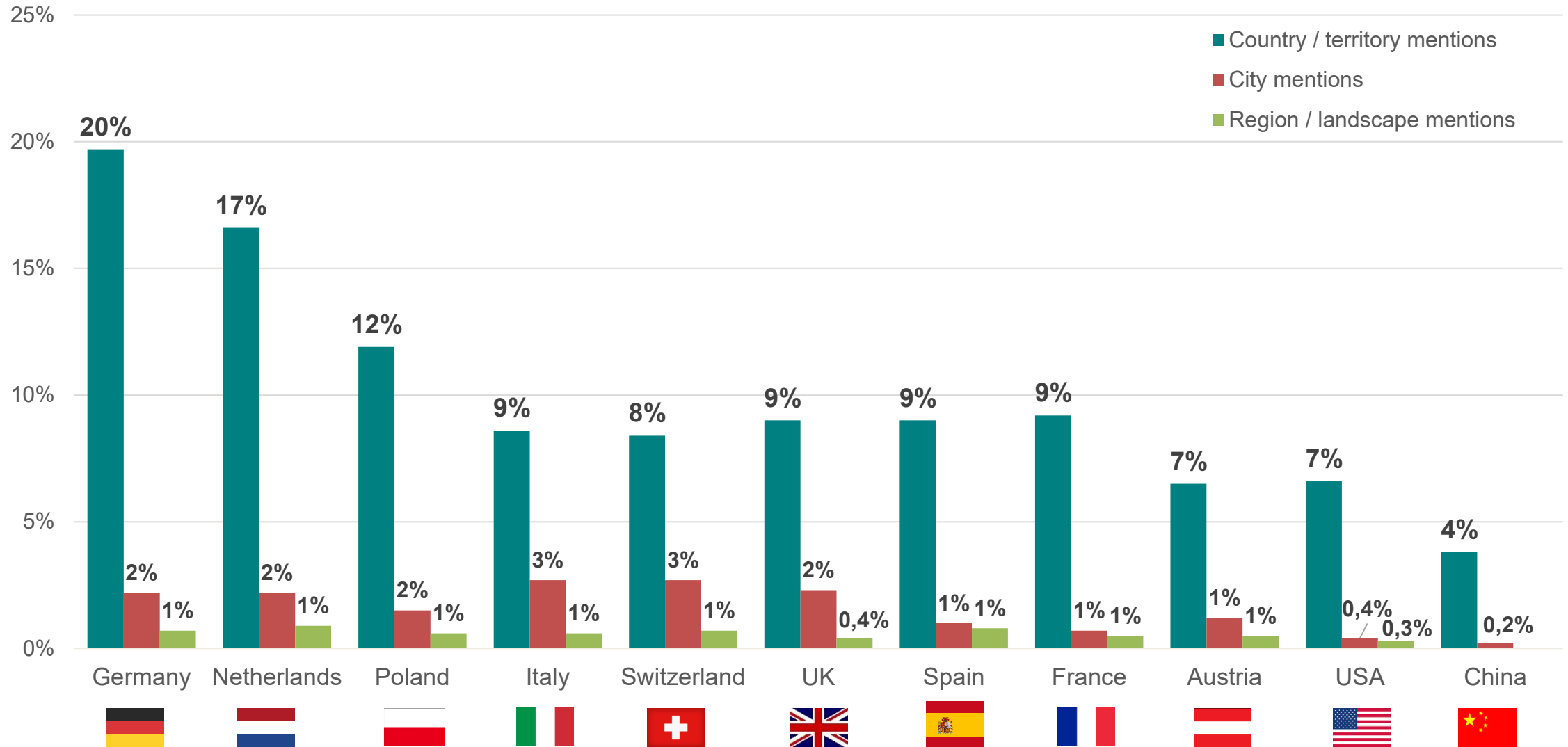
Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, Values are summed mention shares based on % of respondents; they do not represent unique reach

Sum of Top of Mind mention shares of Nordic destinations in % of respondents per source market

Source market	No. found	Nordic destinations found
DE	36	Denmark; Sweden; Norway; Iceland; Finland; Copenhagen; Stockholm; Scandinavia; Oslo; Lapland; Zealand; Greenland; Helsinki; Gothenburg; Bergen; Malmö; North Cape; Bornholm; Odense; Danish North Sea; Jutland; Lofoten; Norwegian fjords; Tromsø; Aalborg; Aarhus; Danish Baltic Sea; Faroe Islands; Gotland; Northern Norway; Norwegian Coast; Stavanger; Swedish Baltic Sea; Tampere; Trondheim; Västra Götaland County
AT	11	Norway; Sweden; Iceland; Denmark; Copenhagen; Finland; Scandinavia; Stockholm; Helsinki; North Cape; Oslo
CH	15	Sweden; Norway; Iceland; Denmark; Finland; Oslo; Stockholm; Copenhagen; Scandinavia; Helsinki; Greenland; Bergen; Bornholm; North Cape; Reykjavik
NL	16	Norway; Denmark; Sweden; Iceland; Copenhagen; Finland; Scandinavia; Stockholm; Lapland; Oslo; Gothenburg; Reykjavik; Bergen; Greenland; Helsinki; North Sea fjords
PL	15	Norway; Iceland; Sweden; Denmark; Finland; Copenhagen; Oslo; Scandinavia; Greenland; Stockholm; Faroe Islands; Helsinki; Lapland; Lofoten; Malmö
FR	11	Norway; Iceland; Sweden; Denmark; Finland; Copenhagen; Lapland; Scandinavia; Rovaniemi; Stockholm; Trondheim
IT	15	Norway; Iceland; Denmark; Copenhagen; Sweden; Finland; Oslo; Stockholm; Lapland; Scandinavia; Faroe Islands; Greenland; Helsinki; Norwegian fjords; Rovaniemi
ES	14	Norway; Iceland; Finland; Denmark; Sweden; Copenhagen; Lapland; Scandinavia; Greenland; Helsinki; Norwegian fjords; Oslo; Stockholm; Tromsø
UK	12	Iceland; Norway; Denmark; Sweden; Copenhagen; Stockholm; Oslo; Finland; Scandinavia; Reykjavik; Helsinki; Norwegian fjords
US	9	Iceland; Norway; Sweden; Denmark; Copenhagen; Greenland; Scandinavia; Finland; Stockholm
CN	7	Iceland; Norway; Sweden; Finland; Denmark; Copenhagen; Reykjavik

Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, Values are summed mention shares based on % of respondents; they do not represent unique reach

Sum of Top of Mind mention shares of Nordic destinations in % of respondents per source market



Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, Values are summed mention shares based on % of respondents; they do not represent unique reach

Top of mind ranking of the first 10 Nordic destinations that come to travellers' minds spontaneously

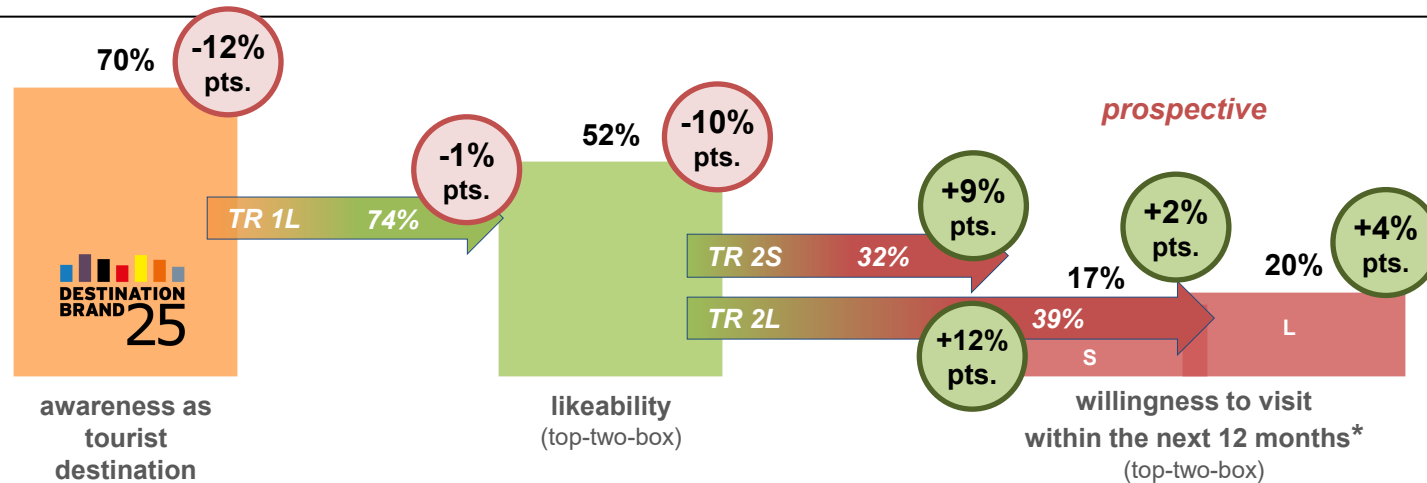
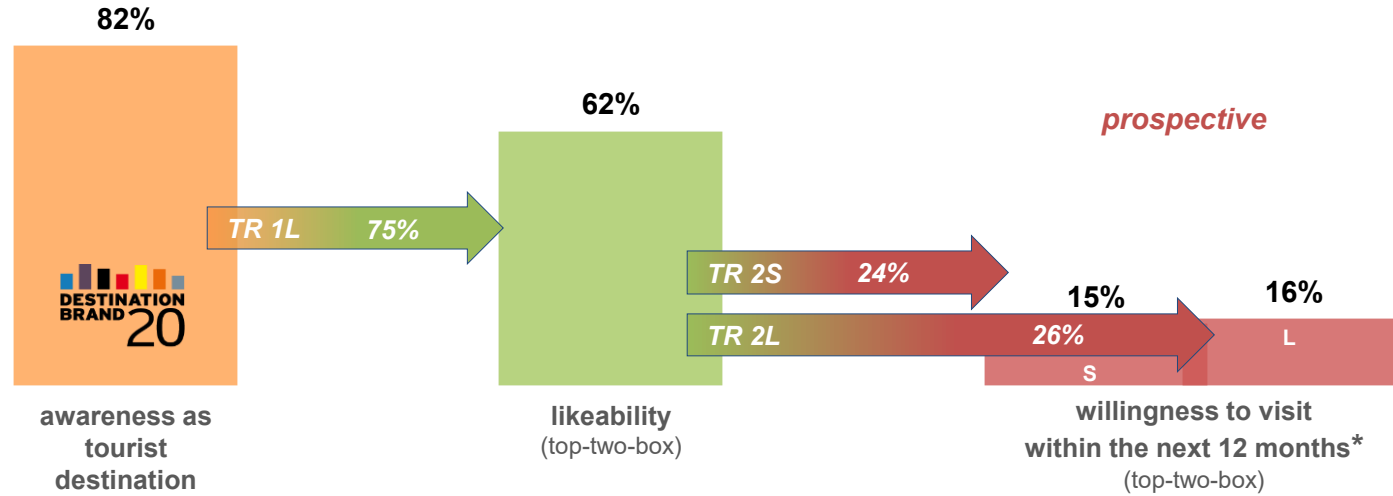
	DE	AT	CH	NL	PL	FR	IT	ES	UK	US	CN
Denmark	1	4	4	2	4	4	3	4	3	4	5
Sweden	2	2	1	3	3	2	5	4	3	3	3
Norway	3	1	2	1	1	1	1	1	2	2	2
Iceland	4	3	3	4	2	2	2	2	1	1	1
Finland	5	5	4	6	5	5	6	3	8	8	4
Copenhagen	6	5	8	5	6	6	4	6	5	5	6
Stockholm	7	7	7	7	9	9	7	9	6	8	
Scandinavia	8	7	8	7	8	8	10	8	8	5	
Oslo	9	9	6	9	7		7	9	7		
Lapland	10			9		7	9	7			
Helsinki		9	10					9			
North Cape		9									
Greenland					9			9		5	
Rovaniemi						9					
Reykjavik									10		6
Trondheim						9					
Norwegian fjords								9			
Tromsø								9			

Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, ranking based on % of respondents

Nordic destinations in travellers' minds

Brand performance of Nordic destinations

Average brand performance of Copenhagen, Stockholm, Oslo, Helsinki in source market Germany



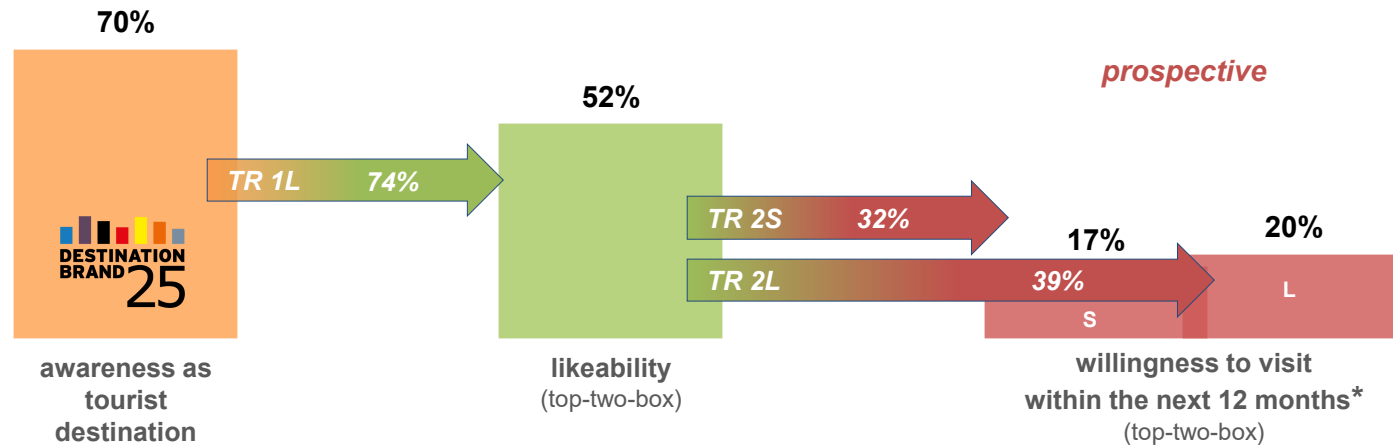
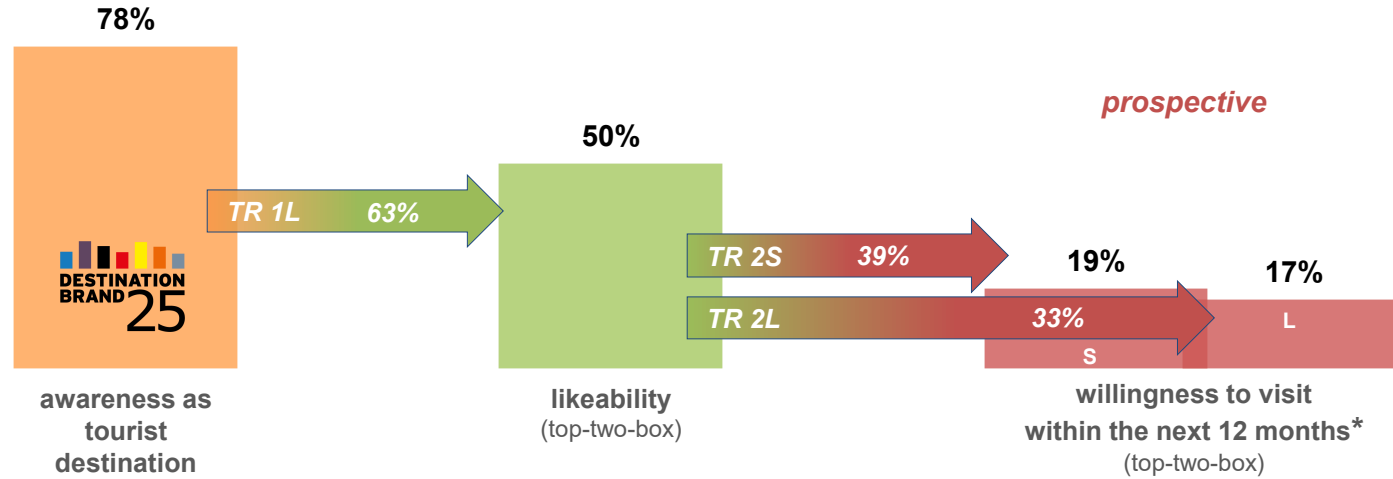
market entry indicator

target value

* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays)

Source: inspektour (international) GmbH / DI Tourismforschung of the FH Westküste, 2020; inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents





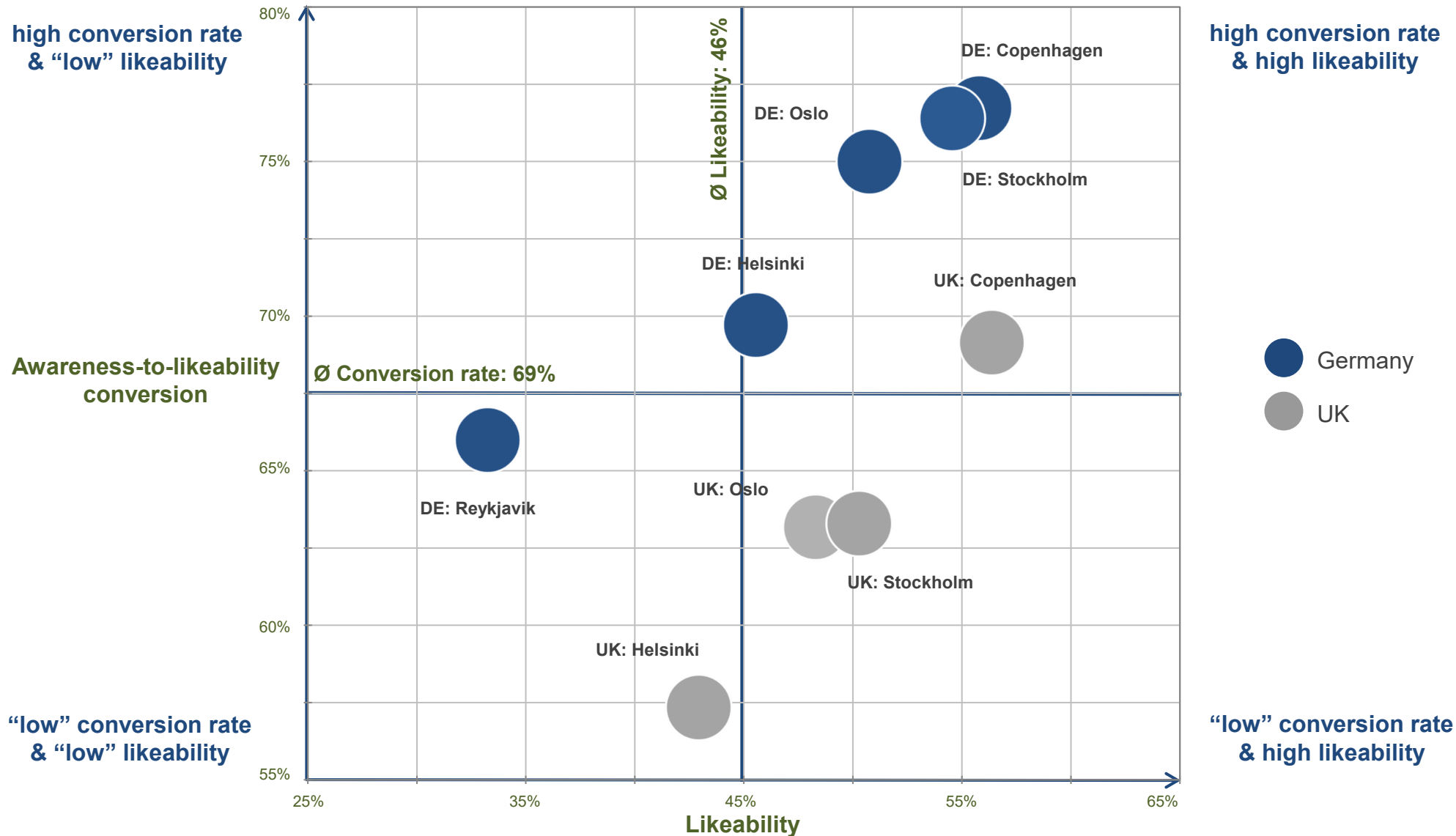
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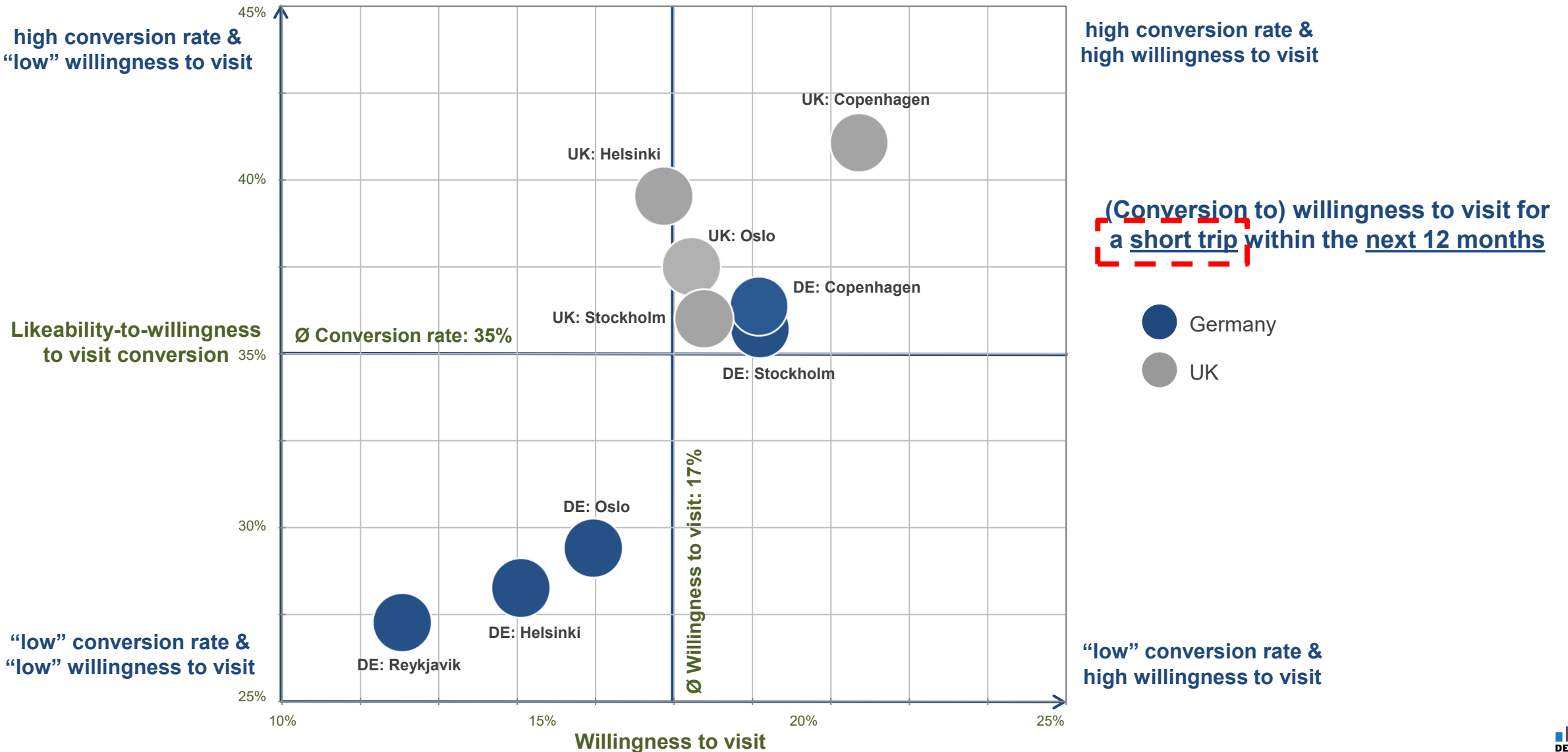
Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents





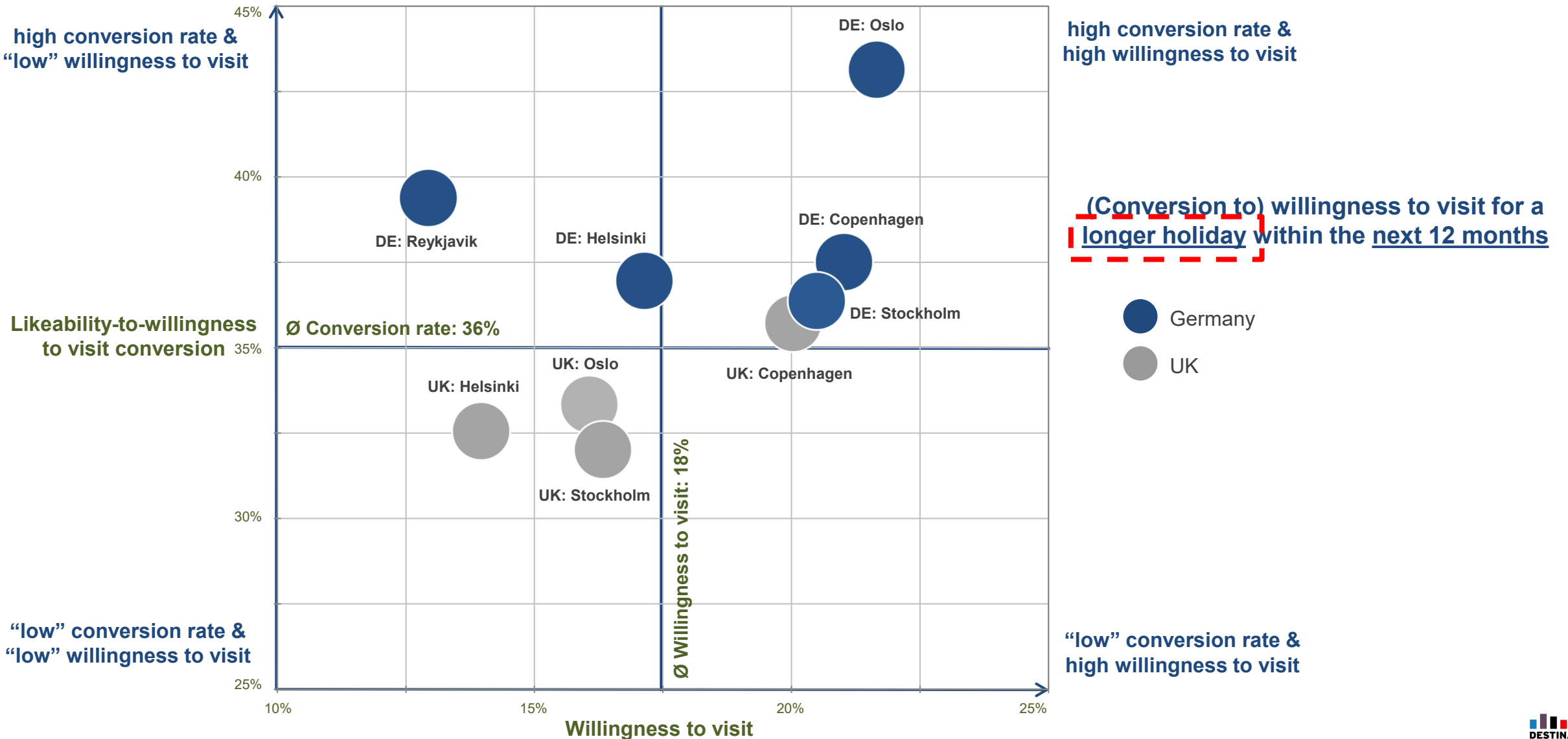
Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

Willingness to visit Copenhagen, Stockholm, Oslo, Helsinki in source markets Germany & UK



Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

Willingness to visit Copenhagen, Stockholm, Oslo, Helsinki in source markets Germany & UK

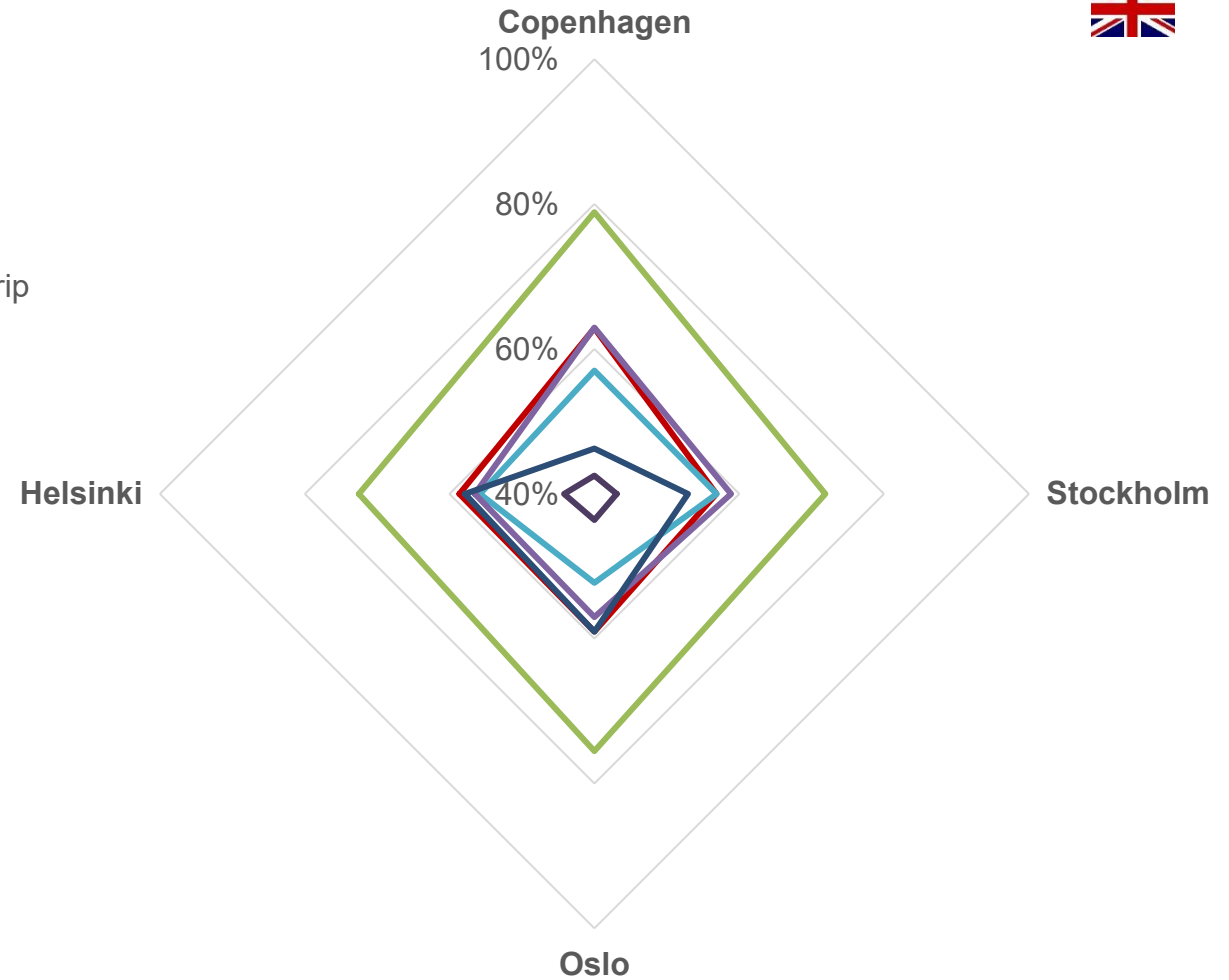
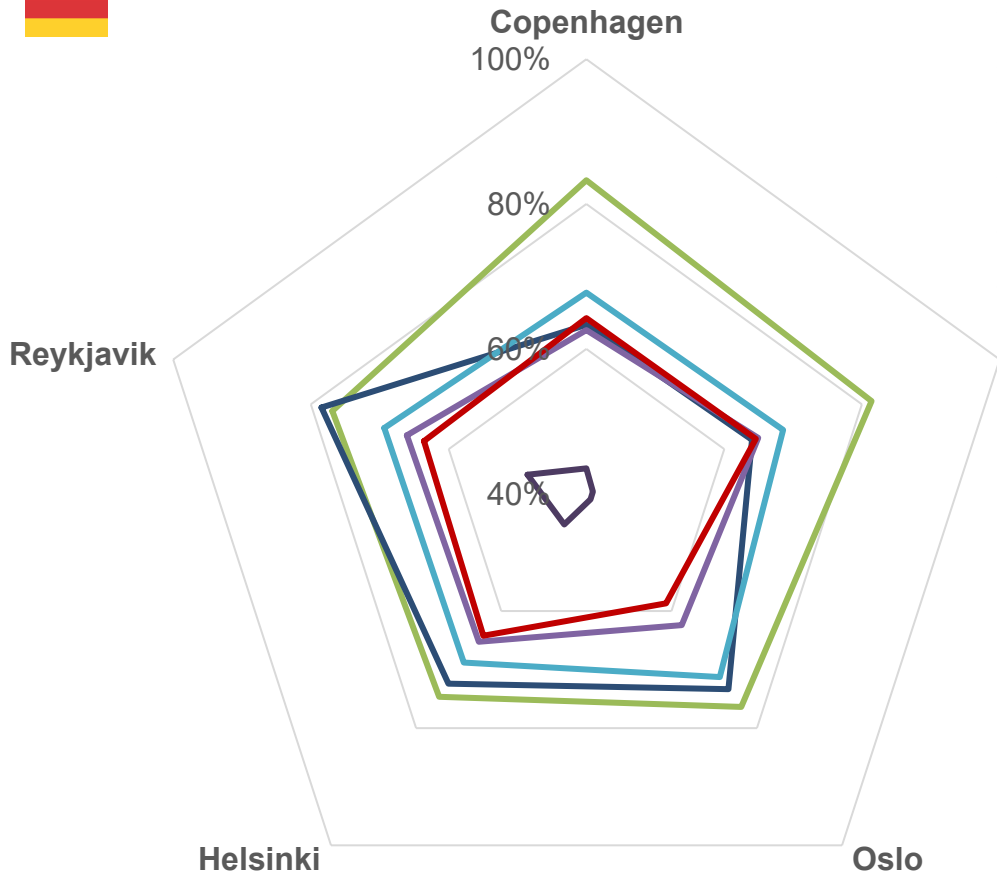


Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

Nordic destinations in travellers' minds

Selected reasons to visit Nordic destinations

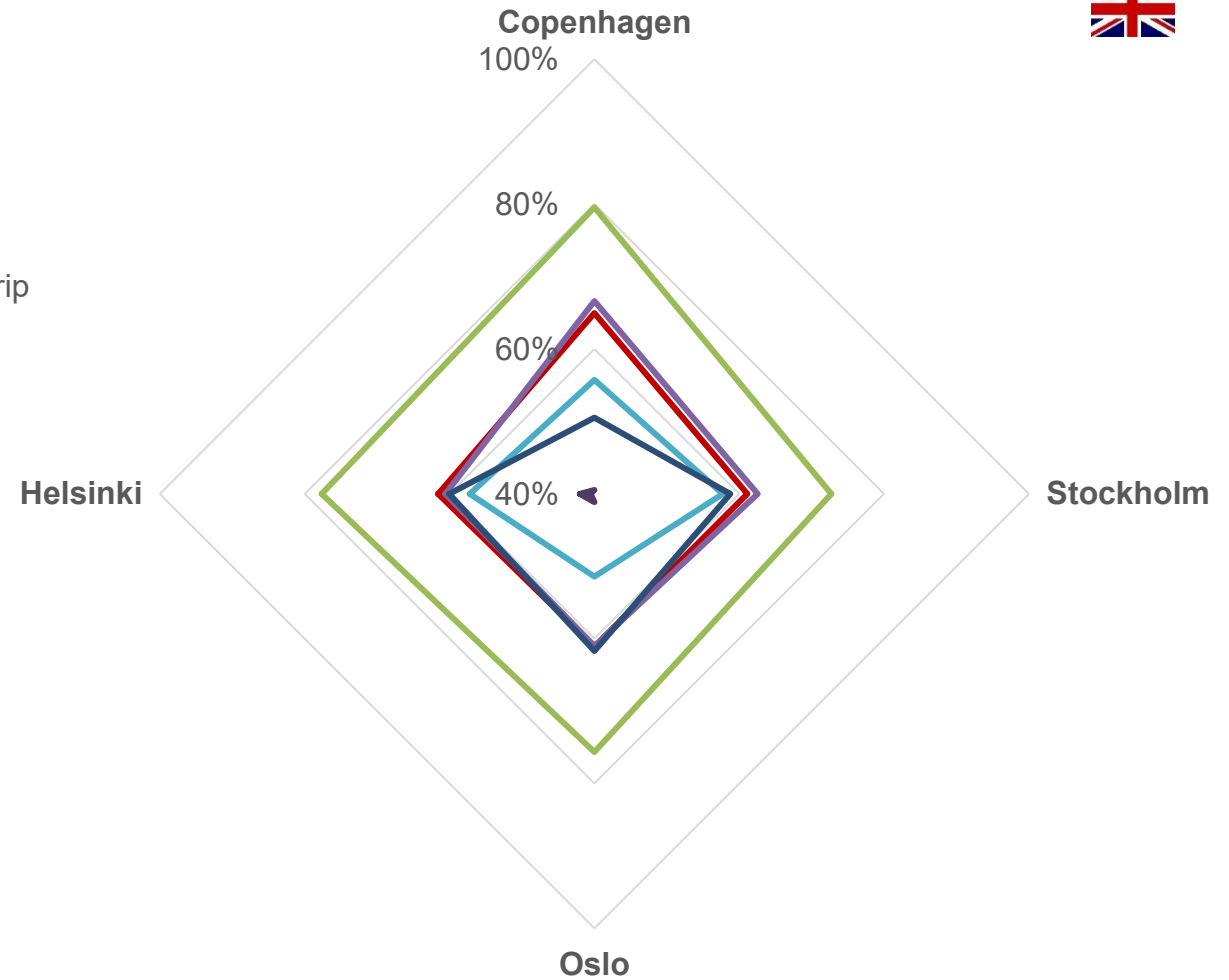
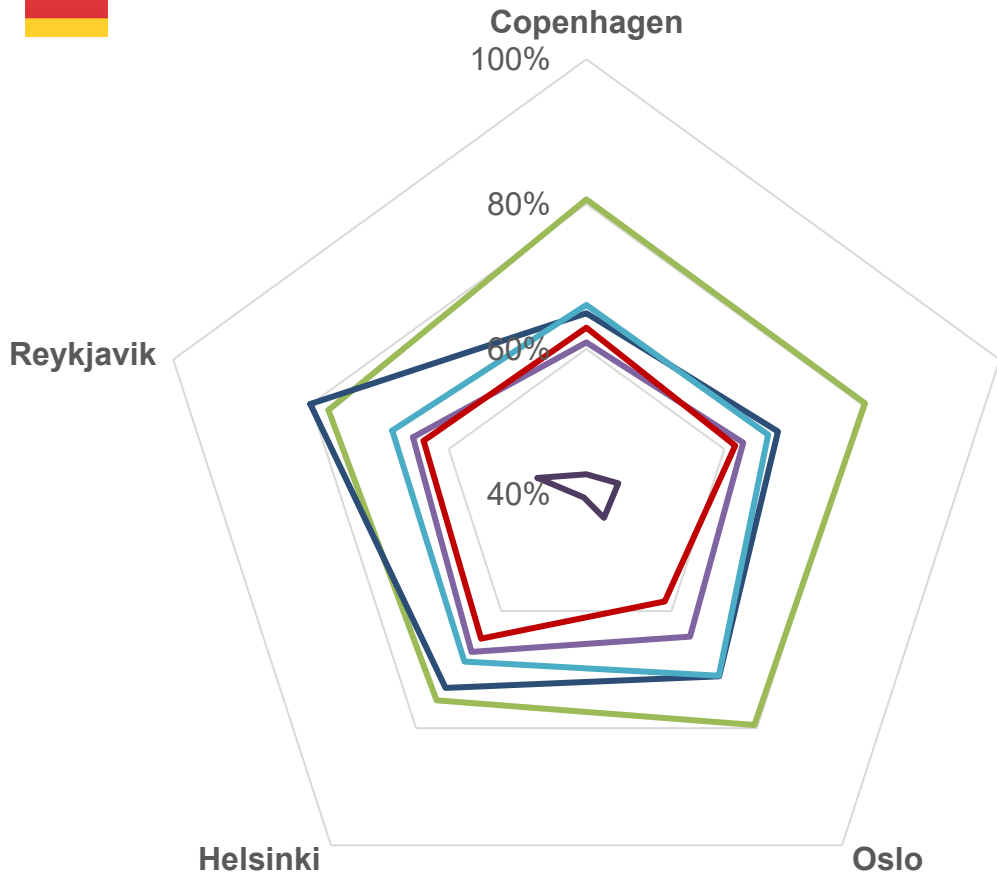
Selected reasons to visit Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik for a short trip – from the source markets Germany & UK



Source: inspektour (international) GmbH, 2025 Base: those willing to visit the selected cities – source market Germany n = min. 152 and UK n = min. 270; top-two-box in % on a scale from '1 = not at all considered' to '5 = definitely considered'



Selected reasons to visit Copenhagen, Stockholm, Oslo, Helsinki and Reykjavik for a longer holiday from the source markets Germany & UK



Source: inspektour (international) GmbH, 2025 Base: those willing to visit the selected cities – source market Germany n = min. 197 and UK n = min. 245; top-two-box in % on a scale from '1 = not at all considered' to '5 = definitely considered'



Nordic destinations in travellers' minds

Implications for destination marketing

Convert country awareness into destination relevance

- Nordic ToM awareness is mainly country-led
- cities, regions & landscapes need clearer travel propositions
- move from broad Nordic image to specific reasons to visit

Use strong Nordic country images as entry points — but translate them into concrete destination propositions.

Strengthen the awareness as a tourist destination

- UK shows stronger travel-destination awareness
- Germany converts awareness into likeability more strongly
- emotional positioning matters, especially in the UK

Use existing awareness as a base for clearer tourism relevance, likeability and visit intention.

Separate short-trip and longer-holiday activation

- UK performs strongly for short-trip activation
- Germany shows stronger longer-holiday conversion
- cities can act as both standalone breaks and gateways

Short trips and longer holidays follow different activation patterns.

Adapt the city narrative by source market

- Germany: city + nature + culinary
- UK: city break + museums + culture + architecture
- Copenhagen is the clearest urban-cultural anchor

Use different narratives for the source market Germany and the UK.

Thank you for your attention!

Imprint

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