Finland’s image as a travel destination in USA
Brand Tracking survey 2019
When asked spontaneously which countries are considered as a holiday destination in the next three years, the Nordics do not rank highly in the USA, with Finland narrowly at the back of the pack.

*Spontaneous Destination Consideration*

Q2. SPONTANEOUS CONSIDERATION DESTINATION

Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries.
When thinking about Finland, the beauty of the country spontaneously comes to mind in the US. As do the Finnish people, the food, the northern lights and the capital.

**Spontaneous Impressions - Finland**

- Finland is a freezing cold country that has a lot of nature and outdoor activities to offer.
- I also think of Northern Lights in Finland, though I love the culture and stories that they have about why the northern lights come. I think of delicious food and friendly people.
- They are known for their ski resorts, lakes, wild reindeer, and Northern Lights.

**Podcast**

Mountains and skiing with a lot of cold.
I think of snow and beautiful landscapes.

Aurora borealis, Helsinki with its markets and restaurants, the seawall, and history. Biking, hiking, and natural beauty.

Beautiful, clean, nice, friendly, and a nice place to relax.

I think it would be clean, colourful, pleasant, friendly, and a nice place to relax.

Beautiful and friendly people. Skiing, and other winter outdoor activities. Long days of sunlight. Clean, fresh air.

Beautiful, expensive.

I think of beautiful outdoor scenery, tourist attractions, historical monuments, delicious food and really pleasant and kind people.

It was quiet and peaceful. Lots of green everywhere. A wonderful place to go on long walks.

I think of beautiful outdoor scenery, tourist attractions, historical monuments, delicious food and really pleasant and kind people.

I think it has a lot of attractions, places to see, historic areas and nice scenery.

I think of moose, I think of snow and beautiful landscapes.

I also think of Northern Lights in Finland, though I love the culture and stories that they have about why the northern lights come. I think of delicious food and friendly people.

Northern Lights, dog sledding or reindeer sledding, winter with hardly any sunlight. Cold!
Travel related searches

Digital Demand 2019
United States

No. 4 in ranking in absolute numbers.
402 100 travel-related Internet searches concerning Finland.
+20 % compared to previous year.

Top Micro-brandtags

<table>
<thead>
<tr>
<th>Micro-brandtag</th>
<th>2018</th>
<th>2019</th>
<th>Δ%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Igloos Ice Hotels</td>
<td></td>
<td></td>
<td>+46 %</td>
</tr>
<tr>
<td>Northern Lights</td>
<td></td>
<td></td>
<td>+38 %</td>
</tr>
<tr>
<td>Cities</td>
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<td></td>
<td>+2 %</td>
</tr>
<tr>
<td>Saunas</td>
<td></td>
<td></td>
<td>+17 %</td>
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<tr>
<td>Things to Do</td>
<td></td>
<td></td>
<td>+27 %</td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
<td>+15 %</td>
</tr>
<tr>
<td>Visit</td>
<td></td>
<td></td>
<td>+25 %</td>
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<tr>
<td>Tourism</td>
<td></td>
<td></td>
<td>+13 %</td>
</tr>
<tr>
<td>Santa Claus</td>
<td></td>
<td></td>
<td>+53 %</td>
</tr>
<tr>
<td>Places to Visit</td>
<td></td>
<td></td>
<td>+19 %</td>
</tr>
</tbody>
</table>

TOP 10 TRENDING MICRO-BRANDTAGS

<table>
<thead>
<tr>
<th>Micro-brandtag</th>
<th>Δ%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regions</td>
<td>79 %</td>
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<tr>
<td>Santa Claus</td>
<td>53 %</td>
</tr>
<tr>
<td>Hotels</td>
<td>51 %</td>
</tr>
<tr>
<td>Igloos Ice Hotels</td>
<td>46 %</td>
</tr>
<tr>
<td>Northern Lights</td>
<td>38 %</td>
</tr>
<tr>
<td>Camping</td>
<td>37 %</td>
</tr>
<tr>
<td>Vacation Packages</td>
<td>30 %</td>
</tr>
<tr>
<td>Restaurants</td>
<td>30 %</td>
</tr>
<tr>
<td>Skiing</td>
<td>27 %</td>
</tr>
<tr>
<td>Things to Do</td>
<td>27 %</td>
</tr>
</tbody>
</table>

Source: D2 Digital Demand
USA overnights in the Nordic countries & in Finland

Statistics Service Rudolf, Statistics Finland
Statistics Sweden, Norway, Denmark and Iceland
USA: Yearly overnights in the Nordic countries

Development of US overnights 2009-2019

4.6M overnights in total

Nordic countries' share of US overnights 2019

- Iceland: 1,433,800 (32%)
- Sweden: 1,059,800 (23%)
- Norway: 925,500 (20%)
- Denmark: 834,900 (18%)
- Finland: 309,100 (7%)
US overnights in Finland 2000-2019

In 2019
- Population: 328 million
- Outbound travel from The US: 129 million arrivals to all destinations in 2019 (+6% from 2018)
- Europe's share of The US outbound travel: 29%
- Finland's share of total US outbound travel: 0.2%
- Travel Expenditure (total outbound travel from The US): 101 Billion EUR

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland

Year 2019
- 7th in country rankings
- With a 4% share of foreign overnights

Average change 2000-2019: +2%
Change 2019 compared to 2000: +36%

Share of overnights by regions 2019

69% 8% 9% 14%
USA overnights in Finland by season

Graph showing the number of USA overnights in Finland by season from 2010 to 2020. The pie chart on the right indicates the distribution of overnights in 2019:
- Winter (12-02): 17%
- Spring (03-05): 22%
- Summer (06-08): 36%
- Autumn (09-11): 25%

Bar graph and pie chart combined to show seasonal trends.
Most popular Visit Finland website content during summer 2020
Visitfinland.com summer 2020

June-August 2020 vs. June-Aug 2019
Compared to same period in 2019 (June-Aug 2019)

- Traffic during summer has decreased by fifth compared to same time last year
- Both organic and paid traffic have decreased a little
  - Traffic from all countries has NOT dropped compared to last year
  - From Germany, UK, Netherlands, Switzerland, Japan traffic has increased
  - Bigger decreases in traffic (over -20% decrease): Sweden, Italy, China, Spain, Russia
- During summer 2020 traffic was close to same as last year
  - On a few days we reported higher traffic than year before
  - We have less campaigns now than year before and the traffic is only about a fifth behind last year overall
- Most traffic still comes from Google search, as before, also Social Media brings a lot of traffic

June-August 2020 vs. Mar-May 2020
Compared to previous period (March-May 2020)

- Traffic has increased from spring substantially
  - Virtual Rent a Finn –campaign in May was a success!
  - The traffic stayed at a higher rate after the campaign
- Organic traffic has increased and paid traffic has decreased
  - Germany, Switzerland, Netherlands, Austria, Norway and Estonia are the countries that have increased in organic traffic most
  - Biggest traffic decreases from (around -30%): Italy and Spain
  - Increase in traffic from both Google and Social Media
  - Direct traffic, organic Yahoo & Bing as well as organic Facebook traffic have continued to increase in August
- Most read articles including all language versions:
  - COVID-19 traveler info article
  - 21 Reasons to Love Finland
  - Iconic Finnish foods of all time

- New articles have been released during summer; for example Virtual tour around Finland & Extraordinary life in the Archipelago.
- More new content is in the pipeline

Source: Visit Finland
Popular Articles on visitfinland.com during summer 2020:

Practical Information for Travelers to Finland during Corona Pandemic
Doze off under the Northern Lights
What are the Finns like?
21 reasons to love Finland
Midsummer – Go Peaceful or Go Party
Iconic Finnish Foods of All Time
Land of the Midnight Sun
10 Sauna Tips for Beginners
On the Hunt for the Northern Lights
On a Virtual Tour Around Finland

During the summer months American visitors were mostly interested in Northern Lights, Midsummer, Midnight Sun and Finnish Food.

During this fall the interest has otherwise stayed the same but Northern lights related articles have gained more popularity.
Global outlook for post-covid19 travel trends and traveller needs
New normal – first impacts on travel demand

• Being immersed in nature and culture are likely to see a surge in interest as the tide turns on mass tourism and “Off the beaten path” destinations with wide open space become more popular.

• After lockdowns and remote work, consumers are looking for nature activities, wellness, luxury as well as transformational experiences.

• As the social and environmental sustainability awareness increases, ”Back-to-basics” & “live-like-a-local” trends get stronger.

• Families and small groups travelling together.

• Cruise travel will be negatively impacted. → what will this wealthy segment be looking for to escape the everyday life, in order to experience relaxation and indulgence?

Source: THE IMPACT OF CORONAVIRUS ON TRAVEL AND TOURISM, Euromonitor May 2020
Going towards the new normal

• Travel brands and destinations will need to become more consumer-centric to ensure their customers and staff feel safe and secure as the phased recovery begins.

• Emphasize the digital services along the journey – dreaming phase, clear and easily accessible information about hygienic safety and services at destination, flexible and easy-to-understand terms on reservation and purchase.

• Listen to the customer and learn how the traveller needs are changing.

➔ **Focusing on the customer and ensuring reliable, transparent, sustainable services – value for money!**
Traveller needs in the new normal

- **Customization** and **personalization** are key cornerstones of the trip
- Travellers now place a higher premium on **problem solving and support**, especially for longer journeys
- Travellers want more control over their travel, and **tailored travel experiences** win out over pre-packaged leisure travel options
- Consumers are opting for **fewer holidays but with longer stays**

> Signs of leisure travel are slowly emerging in places where **natural parks**, **beaches** and **outdoor spaces** are safely accessible and supported by testing and tracing measures.

> Travellers are trying to find their way and make the most of what they can to fulfil their holiday needs – **traveller confidence** is the single most important element.

Trending trip types for nature-oriented travellers

• Most of the pre-covid trends in adventure travel are most likely to accelerate in the new normal
• Sustainability and pure nature, tailor-made activities and services, wellbeing and transformational experiences in focus

→ Finland will have new opportunities with these trends accelerating and the nature travel segments growing

Source: ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
Travel motivations for nature-oriented travellers

- New experiences in safe and pure environment with room to roam
- Experiencing and getting to know local cultures and lifestyles
- Wellness in body and mind – counterbalance for work through silence and mindfulness, physical activities and luxury experiences in nature

**Global outlook**

**Hot Trending Consumer Motivations for Adventure Travel in 2019**

- 1. New Experiences
- 2. To Travel Like a Local
- 3. Cultural Encounters
- 4. Wellness/Betterment Goals
- 5. Adventure Travel as a Status Symbol

**Warm Trending Consumer Motivations for Adventure Travel in 2019**

- 1. Digital Detox (Unplug)
- 2. Pampering and Luxury
- 3. Adrenaline Rush/A Challenge

Source: ADVENTURE TRAVEL TRENDS SNAPSHOT, ATTA 2019
Entering the “next normal”

- Interest towards the Nordic countries was on the rise already pre-covid, and the image of spaciousness / room to roam and pure, beautiful nature are most likely to increase the interest even further.
- After lockdowns and restrictions, consumers are looking for new authentic experiences, wellbeing through nature as well as tailor-made services.
- Nature traveller segments seem to grow.

Great new opportunities also for Finland!
Visit Finland