USA
Regional Pack
(New England, New York, Washington, California, Oregon, Colorado)
USA Market Context

- **Economic growth** in the US is projected to remain robust due to increased wages and higher levels of private consumption. As a result, Americans are expecting to increase their travel budget sharply.

- Travel flows from this market will continue to support Northern European tourism growth, with an annual **regional growth of 4.8% expected** between 2017 and 2022.

- US travellers are looking for new destinations in Europe, and the Nordic countries are deemed to be extremely interesting, with the Nordic design, cuisine, nature and high infrastructure standards being especially appealing.

- Finland is viewed as a new and fresh alternative to more mature destinations. It has recently received a lot of positive media attention in the USA which is helping us promote Finland as a desirable travel destination.
Where do we rank in visitors minds?
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.
A similar picture when prompted, with consideration of Finland sitting behind other Nordic countries. However, the % gap is greater when prompted leaving Finland significantly behind.

**Total Consideration**

Finland

- **45%**
  - Rank ‘19: #13
  - Rank change vs ‘15: *

Sweden

- 59%
  - Rank ‘19: #8
  - *

Denmark

- 55%
  - Rank ‘19: #9
  - *

Norway

- 53%
  - Rank ‘19: #10
  - *

Iceland

- 52%
  - Rank ‘19: #12
  - *

* USA was not tracked in 2015

Q7. PROMPTED CONSIDERATION DESTINATION
Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?

Base: Total Sample (1,001)
Claimed visitation to the Nordic region as a whole is quite low in the US

![Consideration to P3Y visit funnel]

- **Finland**: 45
- **Sweden**: 59
- **Denmark**: 55
- **Norway**: 53
- **Iceland**: 52

**Ever Visited**
- Finland: 6
- Sweden: 13
- Denmark: 11
- Norway: 9
- Iceland: 7

**Visited last 3 years**
- Finland: 4
- Sweden: 5
- Denmark: 5
- Norway: 9
- Iceland: 7

Base: Total Sample (1,001)
What are we known for as a travel destination?
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**

Cold, mountains, snow.

Mountains and skiing with a lot of cold

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

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

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 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.

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!

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

Beautiful, expensive

They are known for their ski resorts, lakes, wild reindeer, and Northern Lights.

Finland is a freezing cold country that has a lot of nature and outdoor activities to offer.

Visit Finland

Q9 BMN

Please take a few moments to think about <COUNTRY>. Please tell us everything that pops into your mind when you think of <COUNTRY> as a tourist destination.
Spontaneous impressions of beauty is consistent across the Nordic region as are the mentions of nature elements.
Although only around 1 in 4 American’s have more than a fair amount of knowledge about Finland, a majority of those do claim they are likely to visit in the next three years, highlighting the opportunities with a larger knowledge base.

**Destination Knowledge (T2B)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Knowledge (%)</th>
<th>Visitation (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>35%</td>
<td>68%</td>
</tr>
<tr>
<td>Iceland</td>
<td>33%</td>
<td>69%</td>
</tr>
<tr>
<td>Denmark</td>
<td>31%</td>
<td>70%</td>
</tr>
<tr>
<td>Norway</td>
<td>30%</td>
<td>65%</td>
</tr>
<tr>
<td>Finland</td>
<td>26%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Base: Total Sample (1,001)
The Nordics are seen as quite a homogeneous region in the US. Sweden and Denmark hold a slight edge on cultural perceptions.
It offers calming and relaxing wilderness escapes and experiences (80%)
It is easy to access (by plane, car or train) (60%)
It has beautiful natural landscapes
It is known for providing/promoting sustainable tourism
It’s a good place to visit all year round
It’s a great place for winter sports/activities (e.g. skiing, snowboarding)
The climate is pleasant for summer holidays
You can enjoy an active summer holiday there (e.g. cycling, canoeing, hiking etc.)
It has a beautiful coastline / archipelago
It has beautiful lake areas with lots of lakes

A fairly similar picture across the region in terms of nature perceptions, though with Norway and Iceland leading the way.
Finland is the Nordic nation least likely to be associated with providing and promoting sustainable tourism in the USA
In your opinion, what is meant by a ‘sustainable travel destination’?

- A travel destination that is environmentally conscious and the attractions for tourists are particularly environmentally friendly.

- Sustainable travel means finding a way that tourism can be maintained long term without harming natural and cultural environments.

- The energy cost of arriving, visiting, and traveling within destination use less energy and produces less waste both in emissions and in tangible objects.

- Low or no net carbon emissions travel to/from. No net impact on the local natural environment.

- One that minimizes their carbon footprint and takes other meaningful action to be as environmentally friendly as possible.

- Sustainable Travel Destinations make an effort to protect the environment and wildlife from the effects of excessive tourism.

- For me it means trying to get a direct flight to reduce my carbon footprint and reducing waste while traveling.

- A destination that focuses on keeping things sustainable, whether that be buying and promoting local purchases, encouraging eco-friendly tours and low-impact activities.

- A place that promotes ecologically sound tourist experiences that doesn’t harm the environment.

- It is a natural place that supports local businesses and cultures. It is not laden with plastic wastes from big corporations. This place holds heritage and pride of the region. Food there is locally grown.

- Nature Hiking, Camping

- Somewhere that cares for the earth as they provide hospitality. They recycle, try to reduce waste, and use sustainable materials.
The homogeneous view of the Nordic region is seen in terms of activities and experiences too. Iceland hold some lead on ‘artic experiences’ (northern lights and the midnight sun)

### Activities Associations

<table>
<thead>
<tr>
<th>Activity</th>
<th>Denmark</th>
<th>Iceland</th>
<th>Sweden</th>
<th>Norway</th>
<th>Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saunas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sleeping in igloos</td>
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<tr>
<td>Seeing the northern lights</td>
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<tr>
<td>Cross-country skiing</td>
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<tr>
<td>The midnight sun (24 hours of daylight)</td>
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<tr>
<td>Visiting the home of Santa Claus</td>
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<tr>
<td>Sailing, boating and water sports</td>
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<tr>
<td>Sleigh rides pulled by huskies or reindeer</td>
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<tr>
<td>Beaches and summer activities (e.g. swimming in the sea)</td>
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<tr>
<td>Participating in sporting events</td>
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</tbody>
</table>
A similar picture on the more cultural activities too

**Activities Associations**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Denmark</th>
<th>Iceland</th>
<th>Sweden</th>
<th>Norway</th>
<th>Finland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cottage and villa retreats</td>
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<tr>
<td>Experiencing indigenous cultures</td>
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<td></td>
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<tr>
<td>Cultural festivals and events</td>
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<tr>
<td>Island hopping</td>
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<tr>
<td>Pure nature and clean air</td>
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<tr>
<td>Visiting lakes/ lake cruises</td>
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<tr>
<td>Visiting national parks</td>
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<tr>
<td>Enjoy culinary experiences</td>
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<tr>
<td>Heritage sites and museums</td>
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<tr>
<td>Moomins</td>
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</tr>
</tbody>
</table>

Base: Total Sample (1,001)
How are people visiting us?
The US population prefer cultural and relaxation holidays as well as tours with multiple locations within a country.

**Preferred Holiday Type (Total Sample)**

- Cultural: 53%
- Relaxation & well-being: 51%
- Tours to multiple cities/locations within a country: 50%
- City breaks: 47%
- Beach: 44%
- Country holidays: 39%
- Tours to multiple countries in a region: 39%
- Outdoors & active holidays in the summer: 37%
- Shopping trips: 28%
- Cruises: 28%
- Outdoors & active holidays in the winter: 21%
- Festive holidays at Christmas: 20%
- Health & spa: 18%

**Q22 PREFERRED HOLIDAY TYPE**

Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?

Base: Total Sample (1,001)
There isn’t currently much differentiation in terms of perceptions of the cultural offer in the Nordic region – highlighting an opportunity to push and promote Finland’s cultural attractions further.

**Holiday Type Consideration**

Which of the following types of holiday would you consider for the following destinations? Please select all that apply.
Americans strongly associate the Nordics with outdoor and active holidays in the summer as well as countryside holidays.

**Holiday Type Consideration**

<table>
<thead>
<tr>
<th>Holiday Type Consideration</th>
<th>Finland</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Norway</th>
<th>Iceland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors &amp; active holidays in the summer</td>
<td>50%</td>
<td>45%</td>
<td>55%</td>
<td>50%</td>
<td>55%</td>
</tr>
<tr>
<td>Outdoors &amp; active holidays in the winter</td>
<td>35%</td>
<td>30%</td>
<td>35%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Relaxation &amp; well-being eg. outdoor yoga, saunas</td>
<td>30%</td>
<td>25%</td>
<td>30%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Beach</td>
<td>15%</td>
<td>10%</td>
<td>15%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Festive holidays at Christmas</td>
<td>10%</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Spas and retreats</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Countryside holidays</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Camping</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Water activities and sports</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: Consideration Set: Finland (458), Sweden (517), Denmark (476), Norway (468), Iceland (444)
Consideration of the Nordic region as a whole is quite low in the US - with Finland ranking at the back of the competitive set.

The low consideration is likely driven by an overall lack of knowledge about Finland as a holiday destination and is resulting in lower conversion of considerers to visitors. Amongst those with knowledge, likelihood to visit in the next three years is greater - highlighting the importance and opportunities of growing the knowledge base in US especially as growth from this market in the Nordic region is expected.

Whilst the Nordic region as a whole is known for its beauty, there appears to be a lack of perceived differentiation across countries too. Aiming to differentiate Finland from its Nordic neighbours would help Finland to standout better and be more top of mind for US travellers.

As a market, the US are particularly keen on relaxation holidays. Promoting the relaxing and wellbeing elements already strongly present in Finland (e.g. saunas) could prove beneficial.

Finland is currently significantly behind its Nordic neighbours in terms of perceptions around offering city breaks. Can more be done to push and promote Helsinki, Tampere and Turku and their cultural attractions to better combat Sweden and Denmark?

Around 1 in 3 American travellers would like to use a tour operator for part of their trip when visiting Finland. Is enough done to link Visit Finland to companies offering these type of holidays in the US?