



**Visit Finland**

# USA

Regional Pack

(New England, New York,  
Washington, California,  
Oregon, Colorado)



# USA Market Context

Visit Finland  
information

- **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.

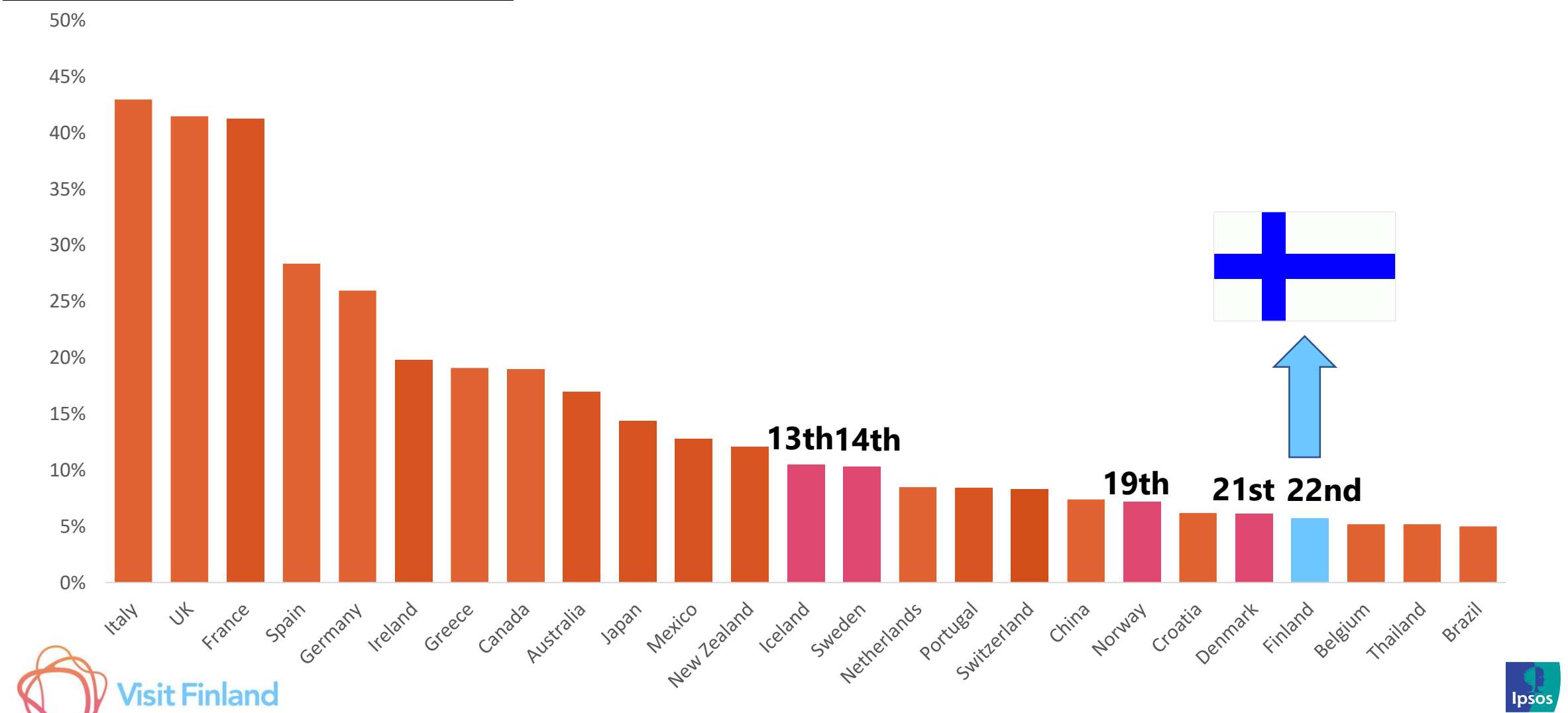


# Where do we rank in visitors minds?



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

Spontaneous Destination Consideration



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Q2. SPONTANEOUS CONSIDERATION DESTINATION

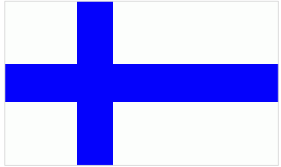
Which countries would you consider for a holiday or short break over the next three years? Please include up to 10 countries



Base: Total Sample (1,001)

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

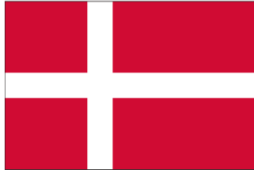
Total Consideration



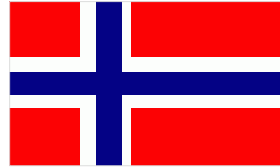
Finland



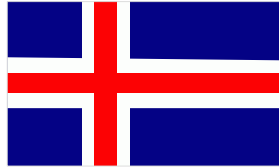
Sweden



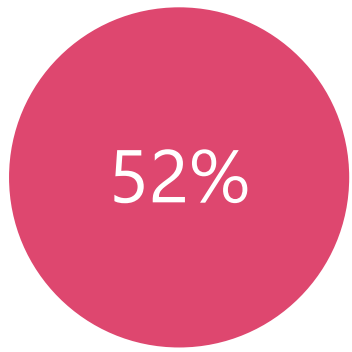
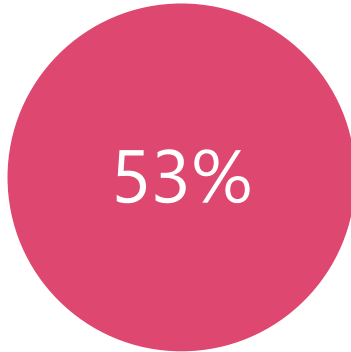
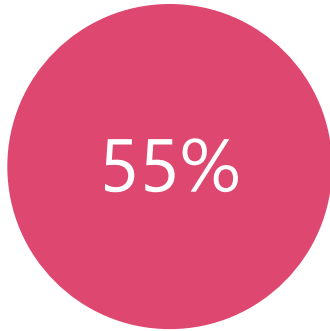
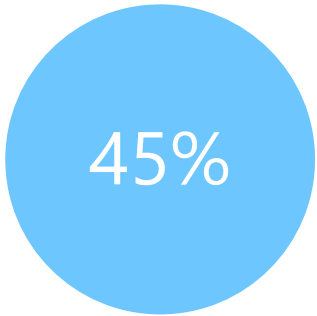
Denmark



Norway



Iceland



Rank '19 **#13**  
Rank change vs '15\*  
\*

**#8**  
\*

**#9**  
\*

**#10**  
\*

**#12**  
\*

\* USA was not tracked in 2015



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Q7. PROMPTED CONSIDERATION DESTINATION

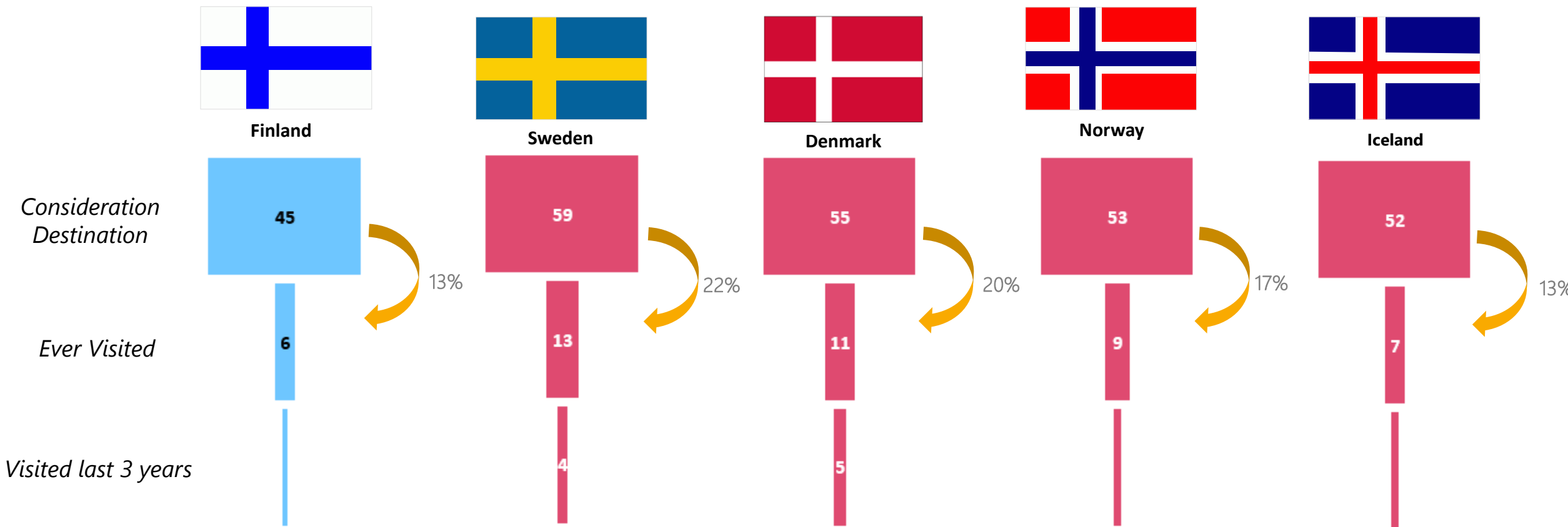
Which of the following countries would you ever consider visiting (or visiting again) as a holiday or short break destination?



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





**What are we known  
for as a travel  
destination?**



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## Spontaneous Impressions - Finland



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

*Northern Lights, dog sledding or reindeer riding, winter with hardly any sunlight. Cold!*

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

*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.*



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 – Competitors



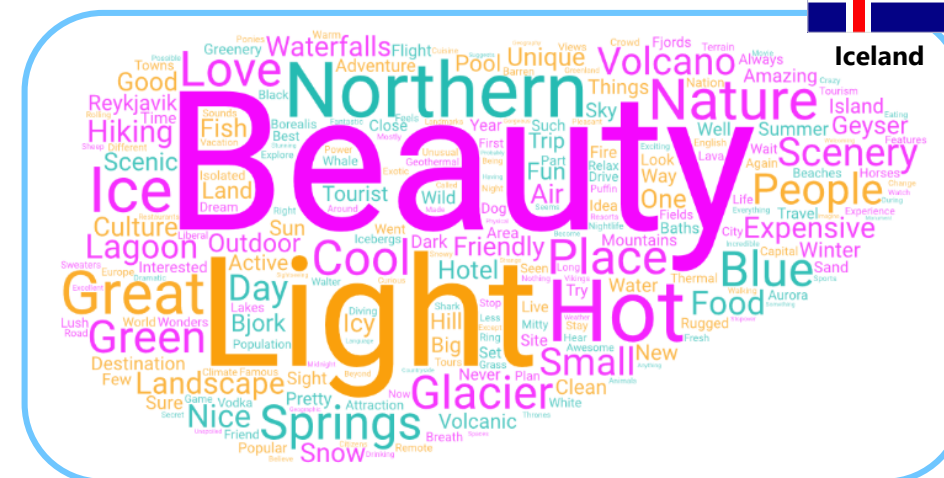
## Sweden



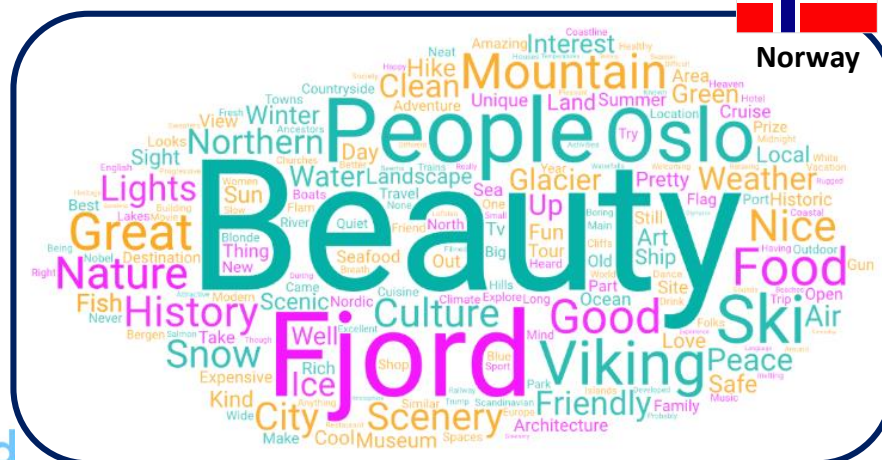
## Denmark



## Iceland



## Norway



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**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.

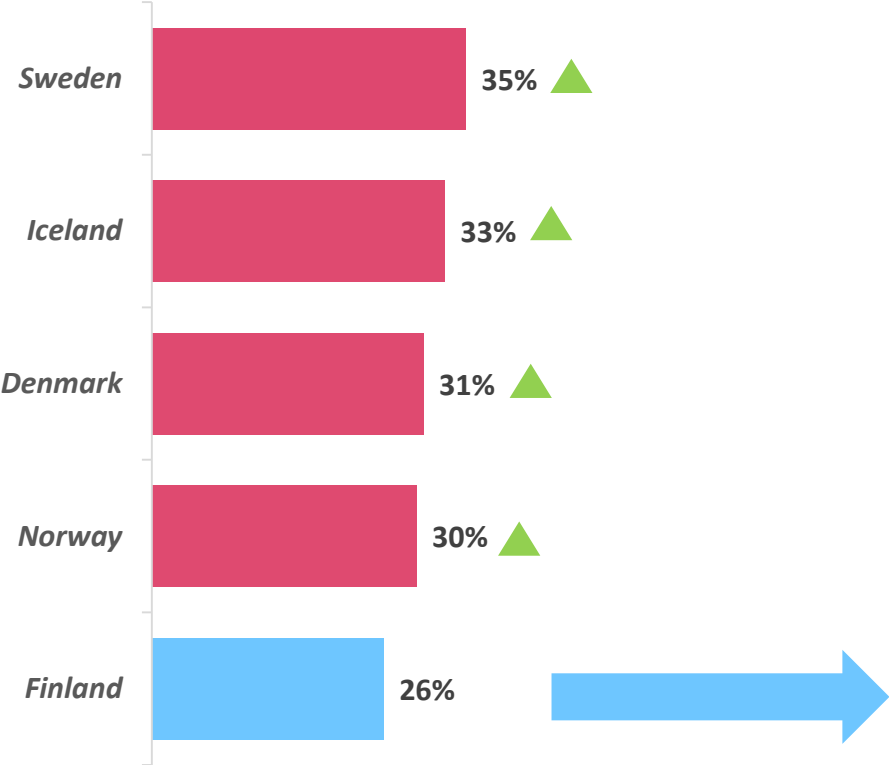
Base: Consideration Set: Sweden (517),  
Denmark (476), Norway (468), Iceland (444)



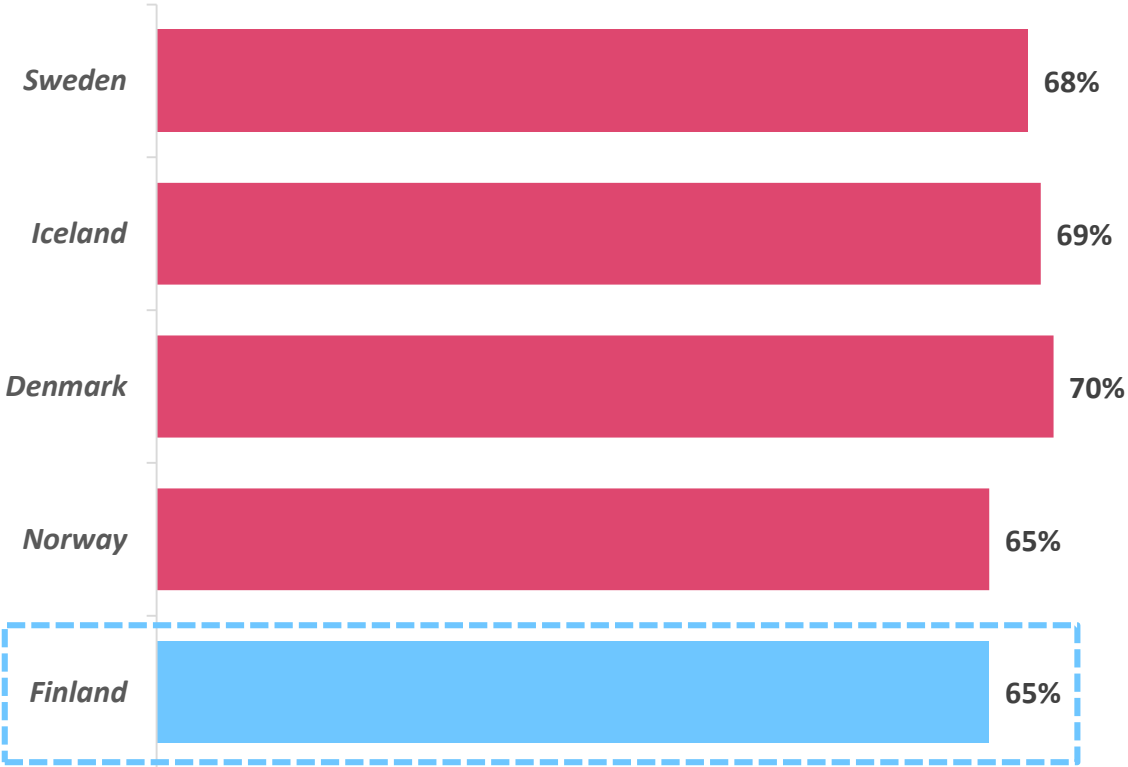


Although only around 1 in 4 American's have more than a fair amount of knowledge about Finland, a majority of those do claim they are likely to visit in the next three years, highlighting the opportunities with a larger knowledge base

Destination Knowledge (T2B)



Claimed visitation to country in the next three years (amongst those with more than a fair amount of knowledge of each country)



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Q10 DESTINATION KNOWLEDGE

How much do you feel you know about each of these countries as a holiday destination?

Sig diff at 95%  
vs Finland

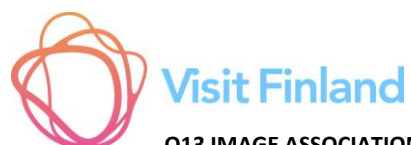
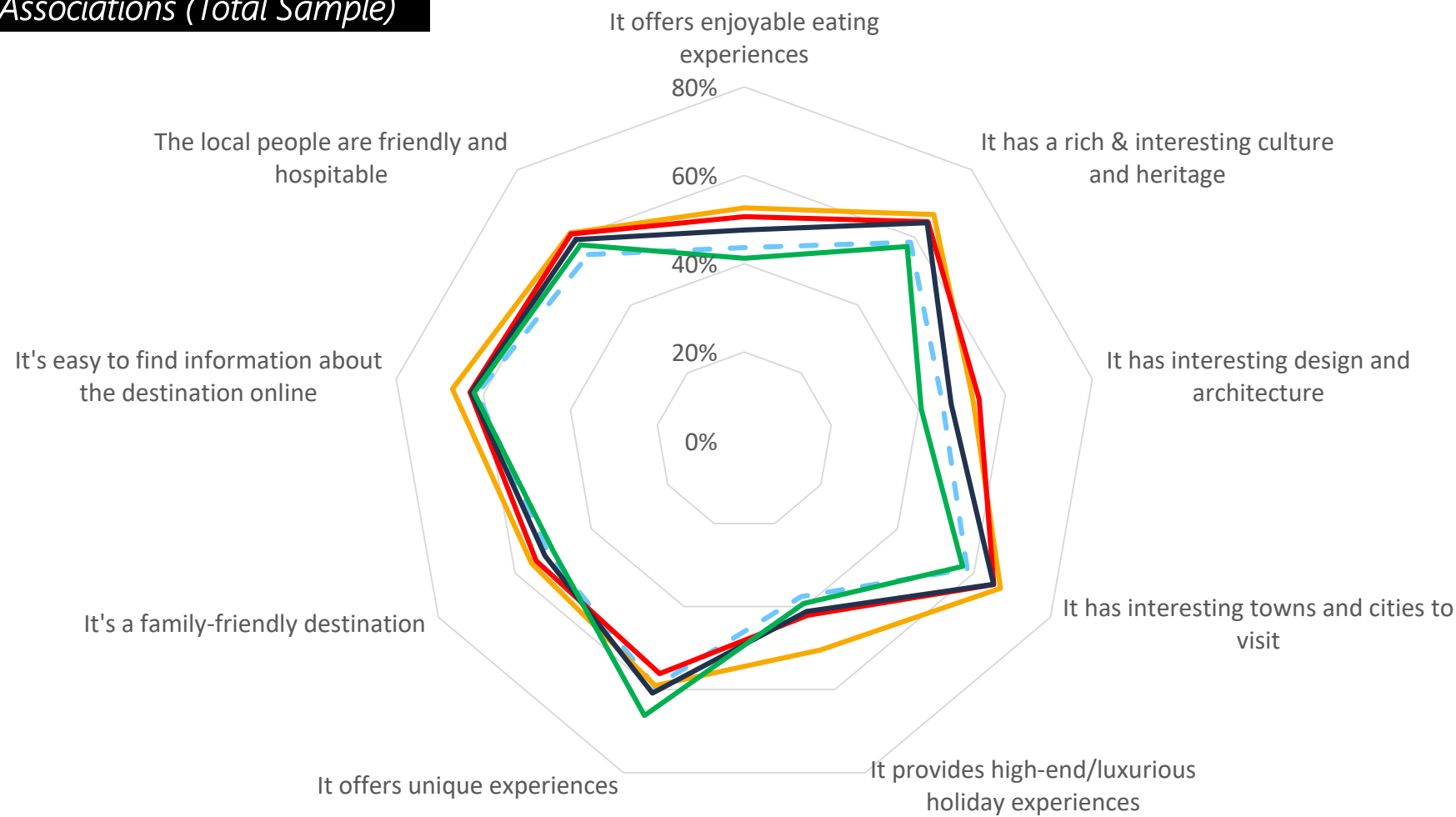


Base: Total Sample (1,001)



The Nordics are seen as quite a homogeneous region in the US. Sweden and Denmark hold a slight edge on cultural perceptions

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS  
Do you associate any of these holiday destinations with the following statements?

— Finland — Sweden — Denmark — Norway — Iceland

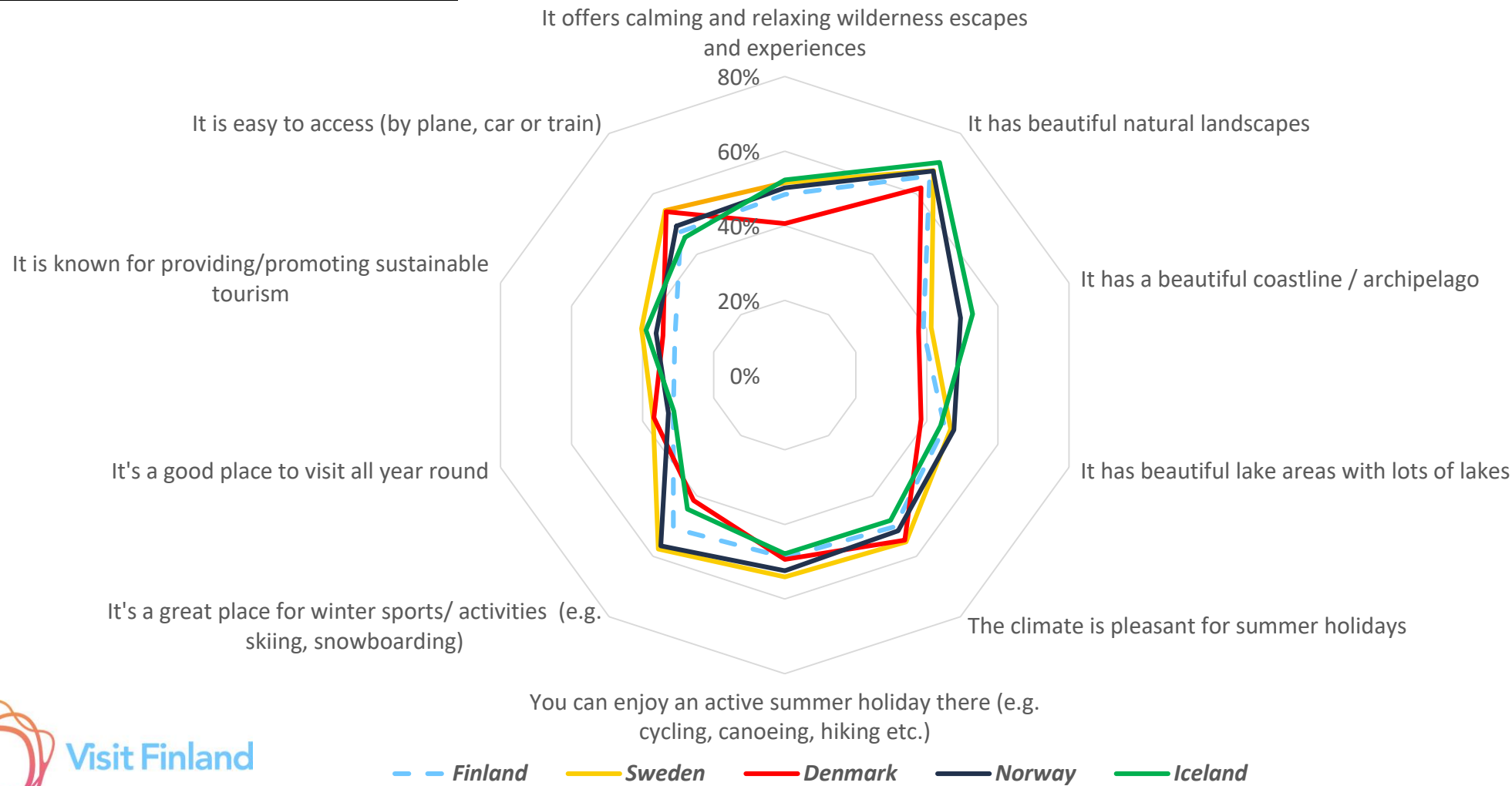


Base: Total Sample (1,001)



A fairly similar picture across the region in terms of nature perceptions, though with Norway and Iceland leading the way

Image Associations (Total Sample)



Q13 IMAGE ASSOCIATIONS

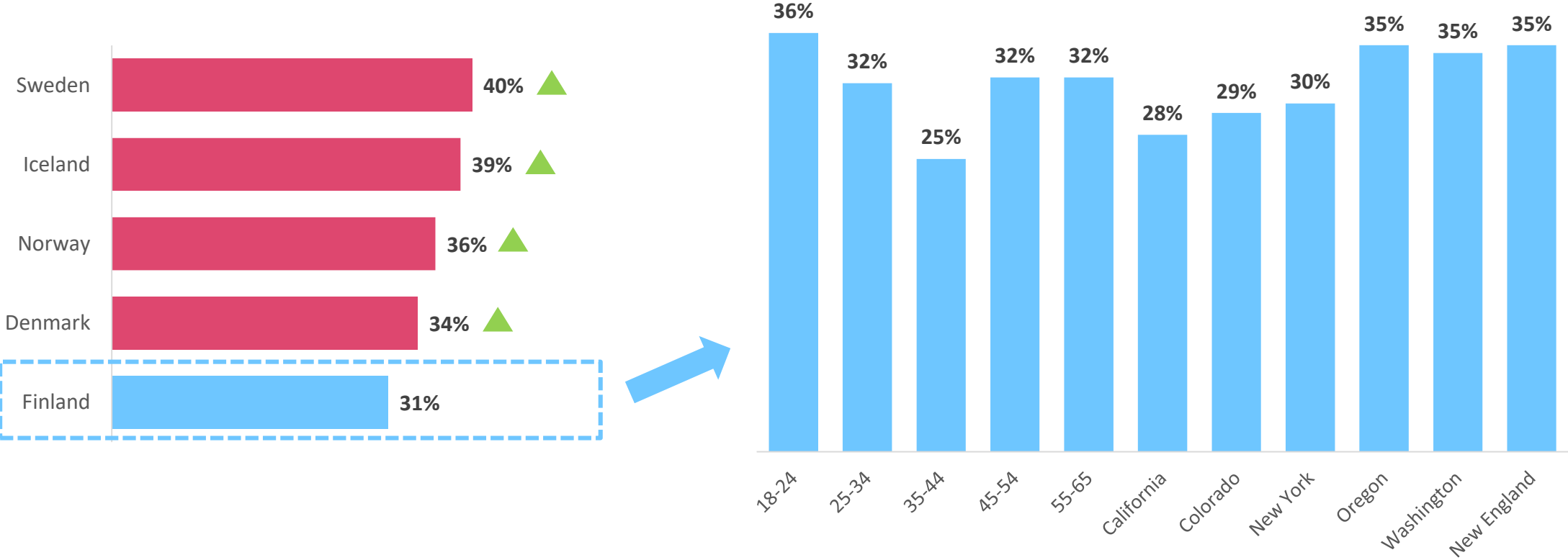
Do you associate any of these holiday destinations with the following statements?

Finland Sweden Denmark Norway Iceland



# Finland is the Nordic nation least likely to be associated with providing and promoting sustainable tourism in the USA

Image - It is known for providing/promoting sustainable tourism



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Q13 IMAGE ASSOCIATIONS

Do you associate any of these holiday destinations with the following statements?

Sig diff at 95%  
vs Total Sample



Base: Total Sample (1,001)





The US perceptions of what a ‘Sustainable Travel Destination’ is, is focused on sustainable transport links to and within the country and encouraging environmentally friendly tourist activities

Sustainable travel destination - OEs

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 is 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.





# Activity Associations

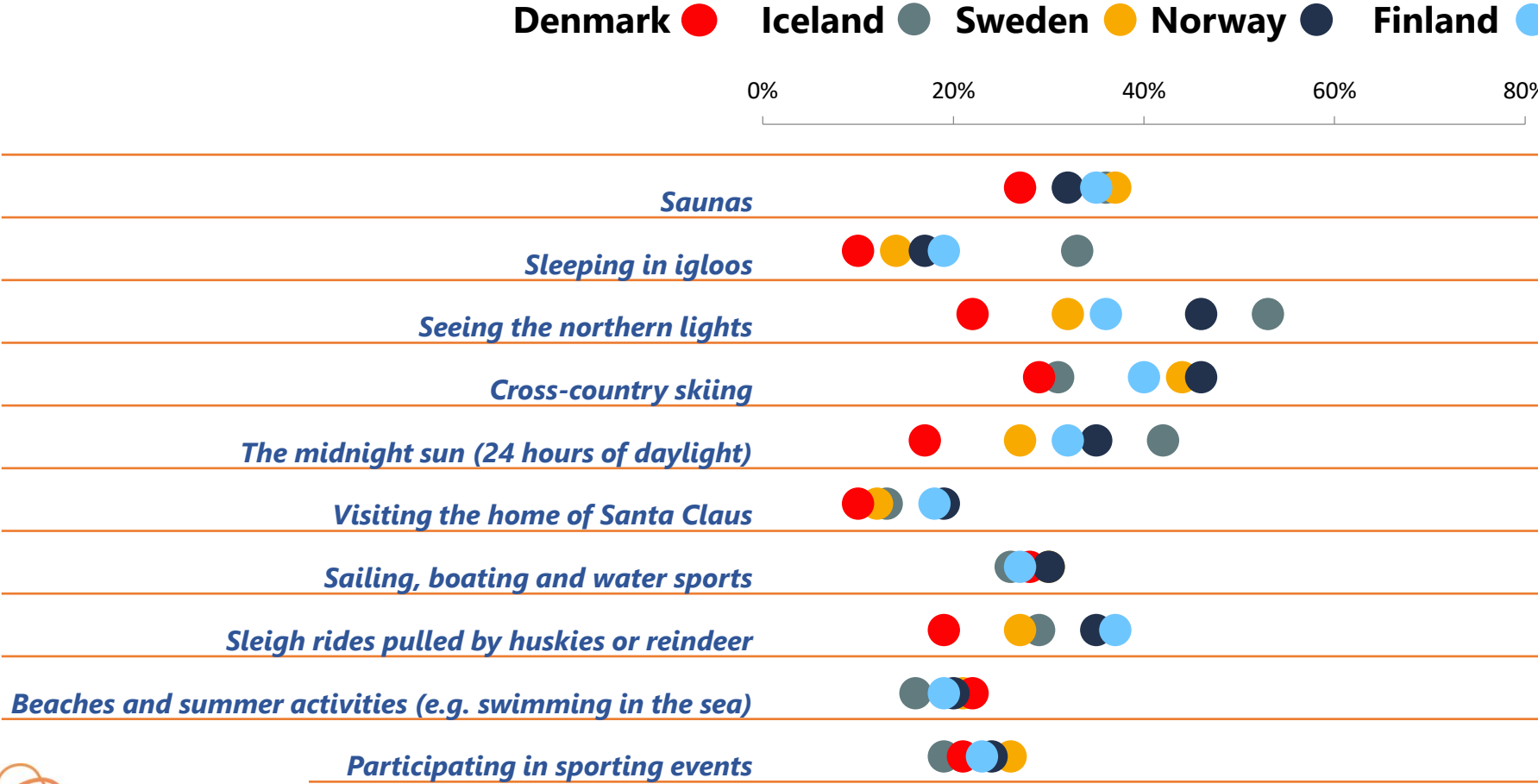


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The homogeneous view of the Nordic region is seen in terms of activities and experiences too. Iceland hold some lead on 'artic experiences' (northern lights and the midnight sun)

Activities Associations



Q15 ACTIVITIES ASSOCIATION

Do you associate any of these holiday destinations with the following activities and experiences?

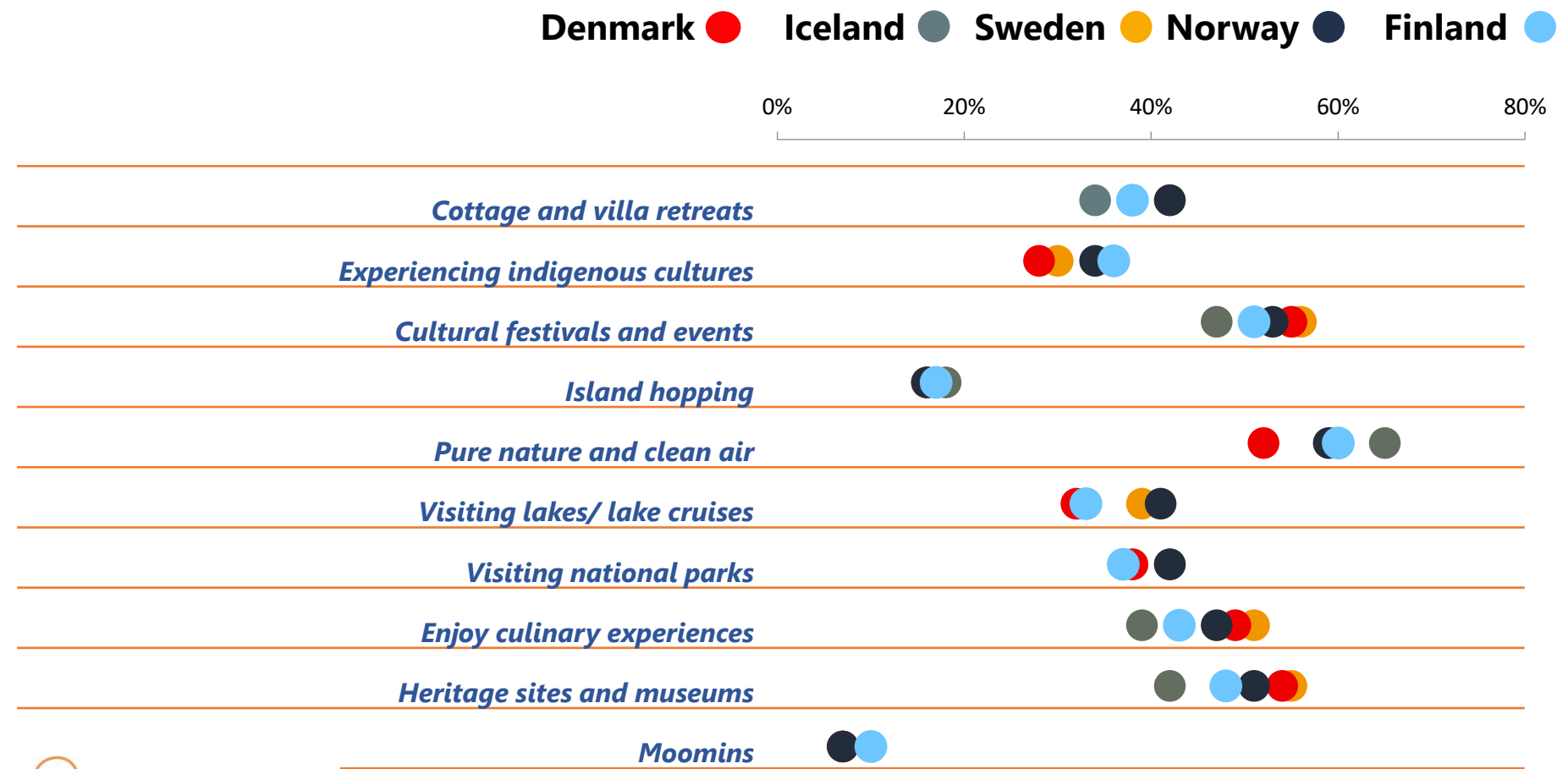
Base: Total Sample (1,001)





A similar picture on the more cultural activities too

Activities Associations



Q15 ACTIVITIES ASSOCIATION

Do you associate any of these holiday destinations with the following activities and experiences?

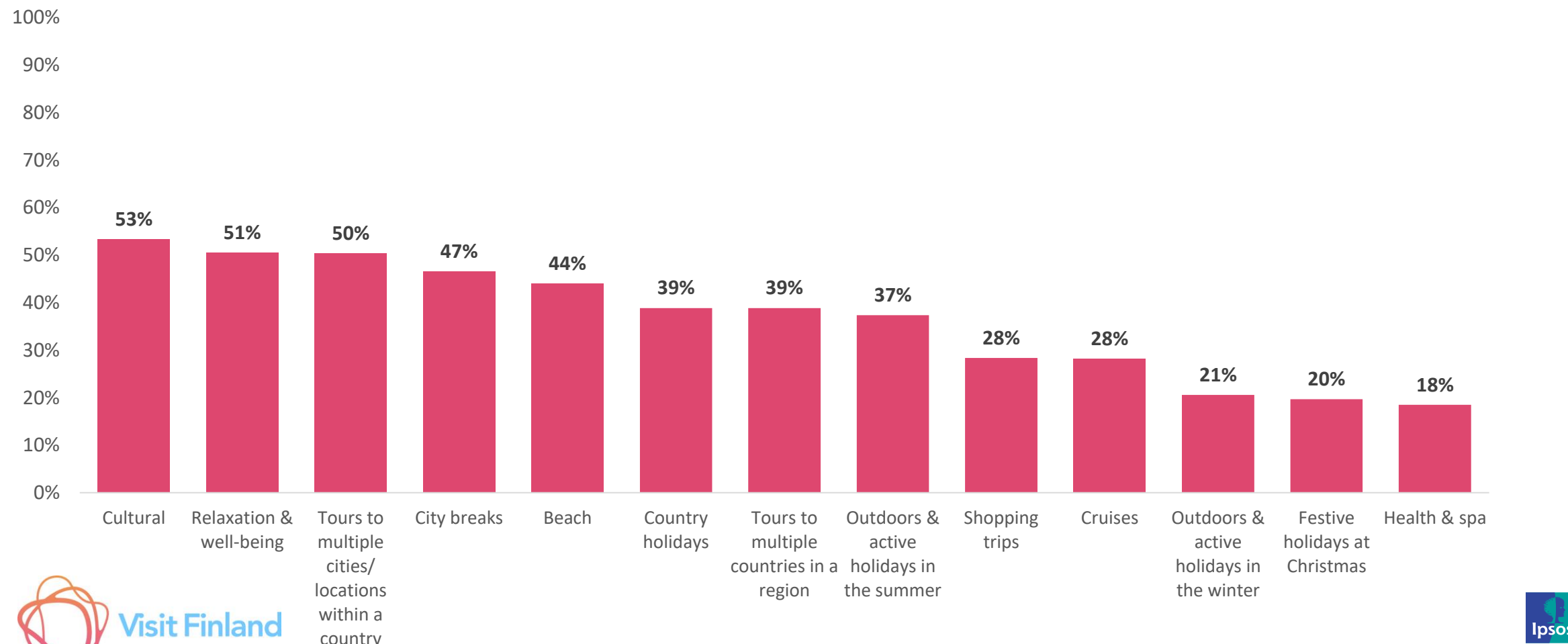


Base: Total Sample (1,001)

# 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)



Q22 PREFERRED HOLIDAY TYPE  
Still thinking about when you travel abroad for holidays, which type of holiday do you prefer to go on?

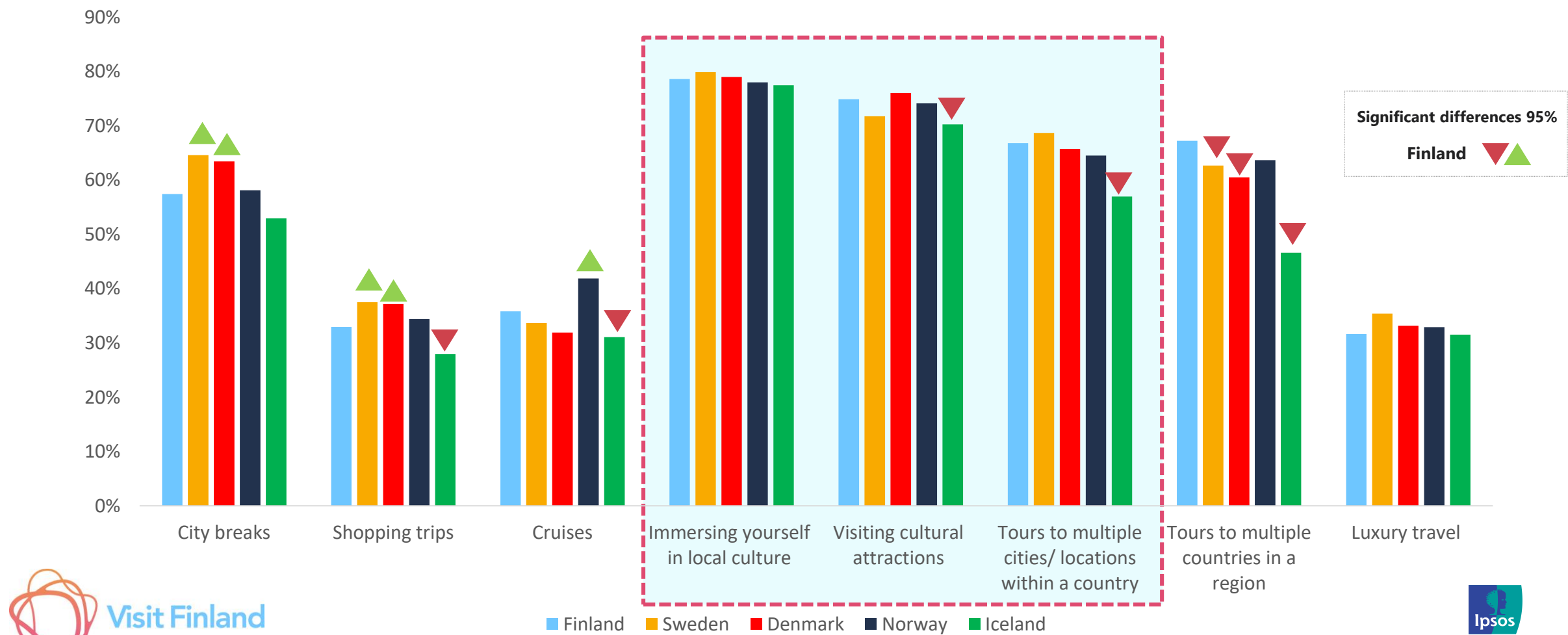


Base: Total Sample (1,001)



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*



Q12 CONSIDERATION HOLIDAY TYPE

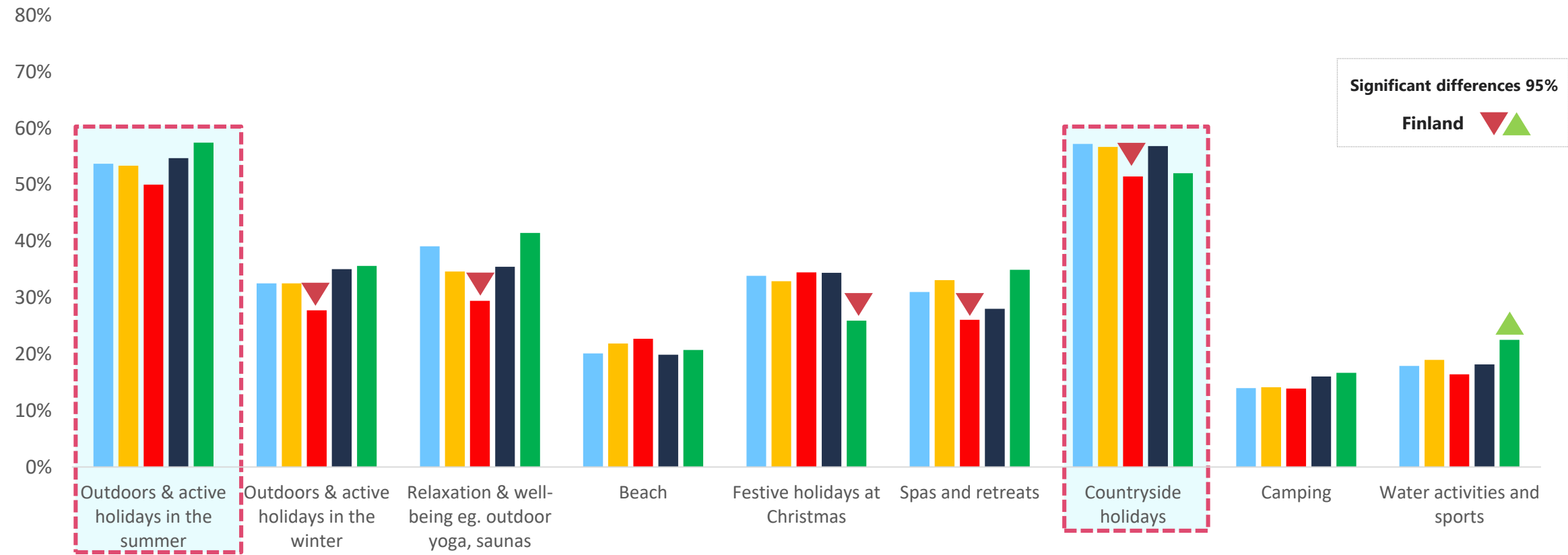
Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Base: Consideration Set: Finland (458), Sweden (517), Denmark (476), Norway (468), Iceland (444)



Americans strongly associate the Nordics with outdoor and active holidays in the summer as well as countryside holidays

Holiday Type Consideration



Q12 CONSIDERATION HOLIDAY TYPE

Which of the following types of holiday would you consider for the following destinations? Please select all that apply

Finland Sweden Denmark Norway Iceland

Base: Consideration Set: Finland (458), Sweden (517), Denmark (476), Norway (468), Iceland (444)



# Summary & Recommendations



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## Summary and Final Thoughts.

- 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 stand out 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?



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