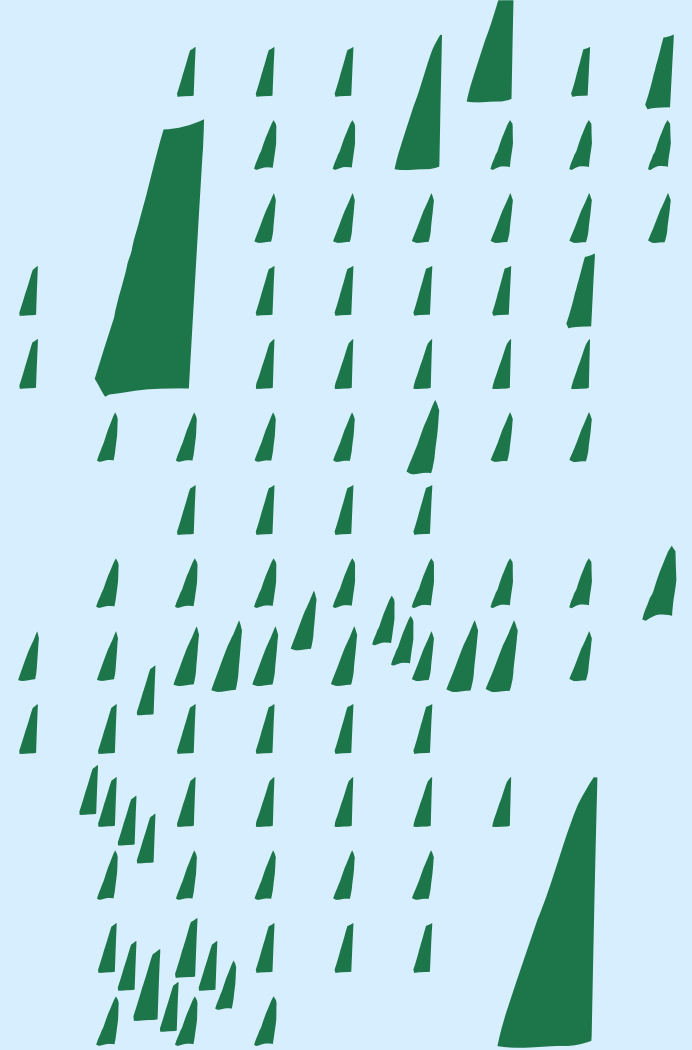


USA

Country Report



Background of the study

Survey data

Markets: Germany, Spain, France, USA, Japan

- Spain, France, Japan: national
- Germany: West Germany and Berlin, excl. East Germany
- USA: California, Texas, New York, Massachusetts and Illinois

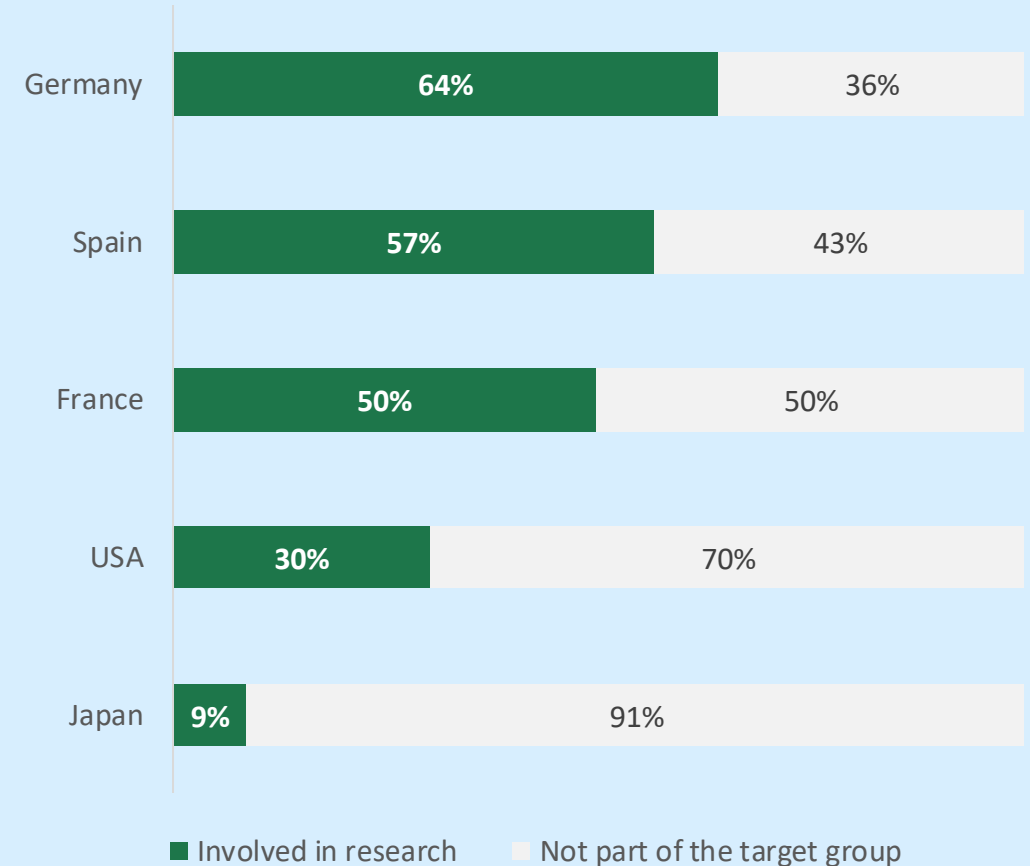
Target group: 18-65 years old, planning a leisure trip abroad in the next three years (Germany, Spain, France), planning a leisure trip to Europe in the next three years (USA, Japan)

Data collection period: 3 July – 30 July 2025

Research method: Quantitative online survey

Sample size: Germany 1020 IP, Spain 1009 IP, France 1026 IP, USA 1002 IP, Japan 1003 IP

Plans a leisure trip in the next three years



Profile card USA



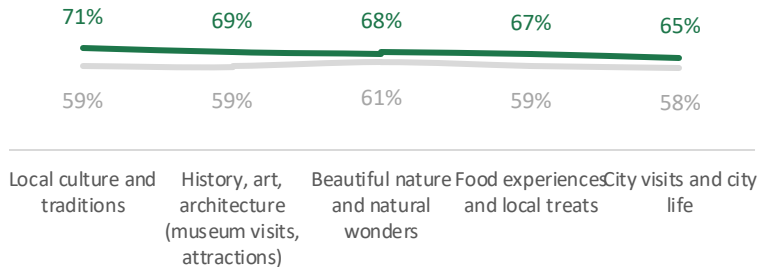
■ USA ■ Kaikki markkinat



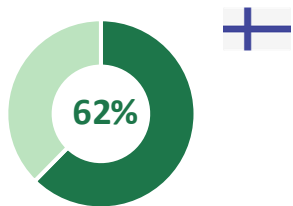
SEGMENTS



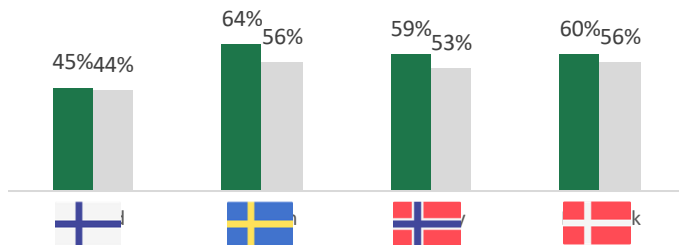
THE MOST INTERESTING TRAVEL THEMES



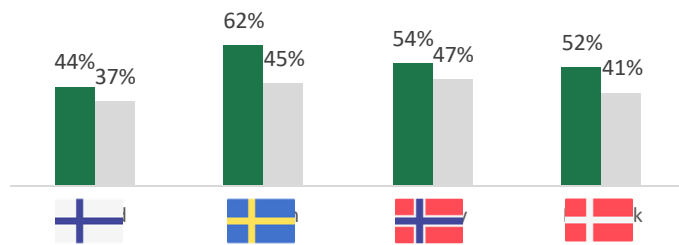
THE ATTRACTIVENESS OF FINLAND AS A FOOD TOURISM DESTINATION



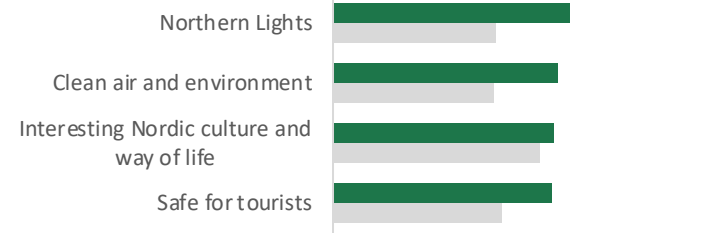
AWARENESS OF THE NORDIC COUNTRIES



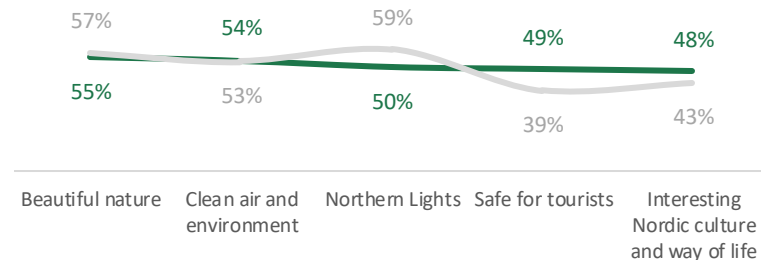
CONSIDERATION OF THE NORDIC COUNTRIES



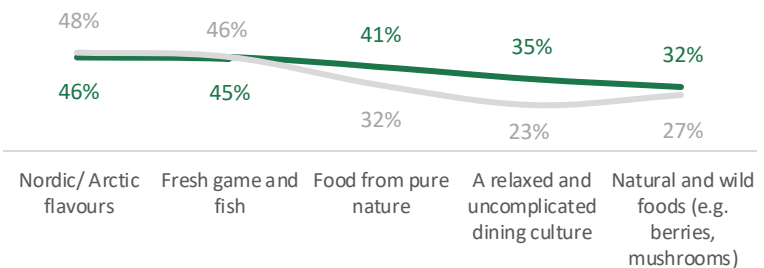
MOST IMPORTANT DRIVERS OF CONSIDERATION FOR FINLAND



TOP 5 COUNTRY IMAGES OF FINLAND



TOP 5 FOOD IMAGES IN FINLAND



Summary USA

AMERICANS AS TRAVELERS



American tourists are interested in a variety of **different travel themes**, such as **local culture, history, art, nature, and food**. They're clearly more **attracted to entertainment and shopping** than tourists from the comparison countries.

Of the European countries, they are most interested in **Italy, France and Spain**. Finland and Denmark are on the same level of attractiveness, while they consider Sweden and Norway slightly more. The main obstacle to choosing Finland is the **lack of information about the country's tourism offerings**, but 44% would still consider traveling to Finland.

Americans associate both Finland and the Nordic countries above all with **beautiful nature, as well as clean air and the environment**. The most important images to consider Finland relate to **the Northern Lights, clean air and the environment, Nordic culture and security**.

RELATION TO FOOD



For American tourists, it's important to try both **local and international, and new cuisine in general**. Food and drink experiences are an essential part of their holiday.

Finland's attractiveness as a food travel destination is diminished by the fact that **Finnish food is not known** or not seen as a good match for personal preferences.

Nordic flavours, fresh game and fish are the most common food images associated with both Finland and other Nordic countries. Finland's food image does not differ from neighbouring countries, except that pastry is combined with Finland a little less. Of particular interest about Finland are **Nordic flavours, fresh game and fish, food from pure nature, and natural and wild food**. In these images, Finland's image is on the same level as that of the other Nordic countries.

American tourists would be interested in trying out a variety of food experiences, such as **visiting markets and market halls, enjoying local specialties at a hotel breakfast, and tasting local cuisine**.

AMERICANS VS OTHERS



Among American tourists, the **Lifestyle traveller** segment is by far the largest, and there are more of them than in the comparison countries.

What drives them to consider Finland as a travel destination is guided above all by the **northern lights, as well as clean air and the environment**, and these factors are especially important for Americans compared to other countries. However, the Northern Lights are connected to Finland a little less often among tourists from the United States than from other countries. Instead, Finland is perceived by Americans as a **safer travel destination** than tourists from other countries.

Americans' food image of Finland is similar to that of travellers from other countries: the strongest perceptions are related to **Nordic flavours, as well as fresh game and fish**. Fresh game and fish is a slightly more important driver of Finnish consideration for Americans than for tourists from other countries. In addition, Americans associate food from **pure nature and a relaxed dining culture** with Finland in particular.

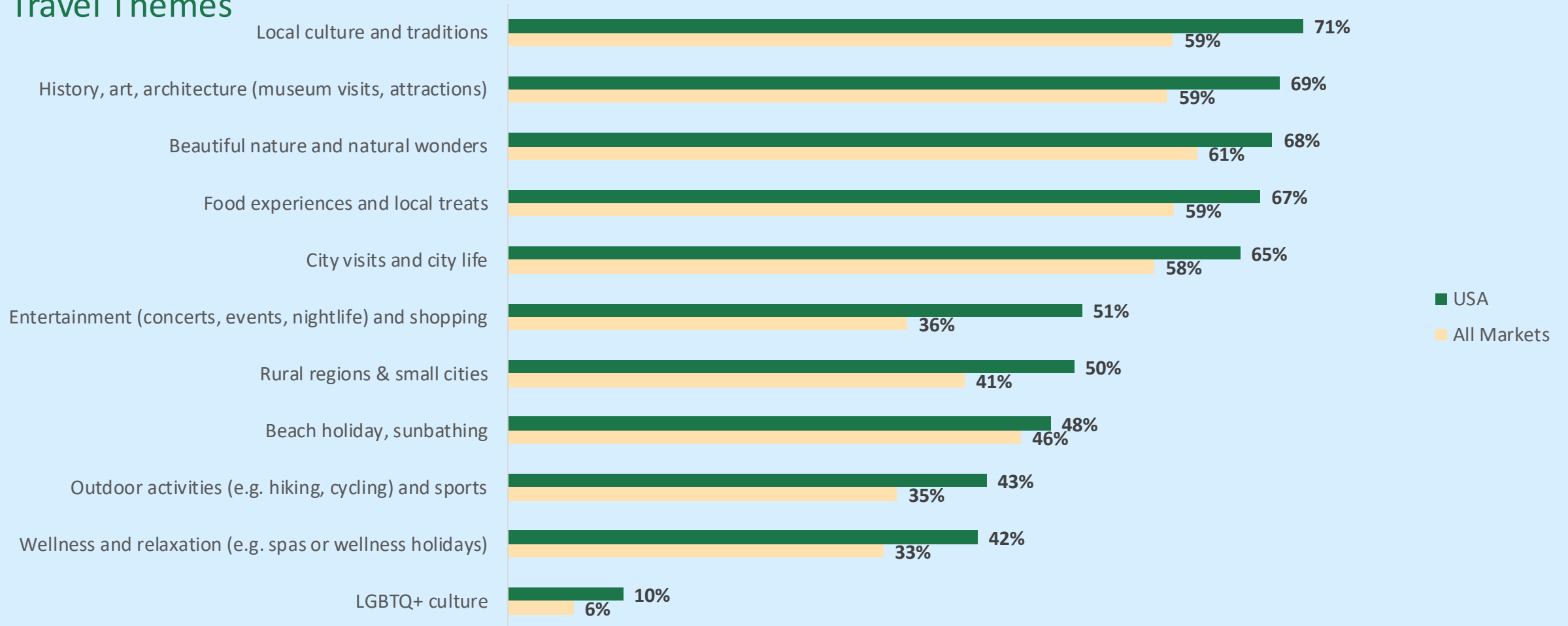
Travel behaviour & Interests



Image: Elina Manninen / Visit Finland

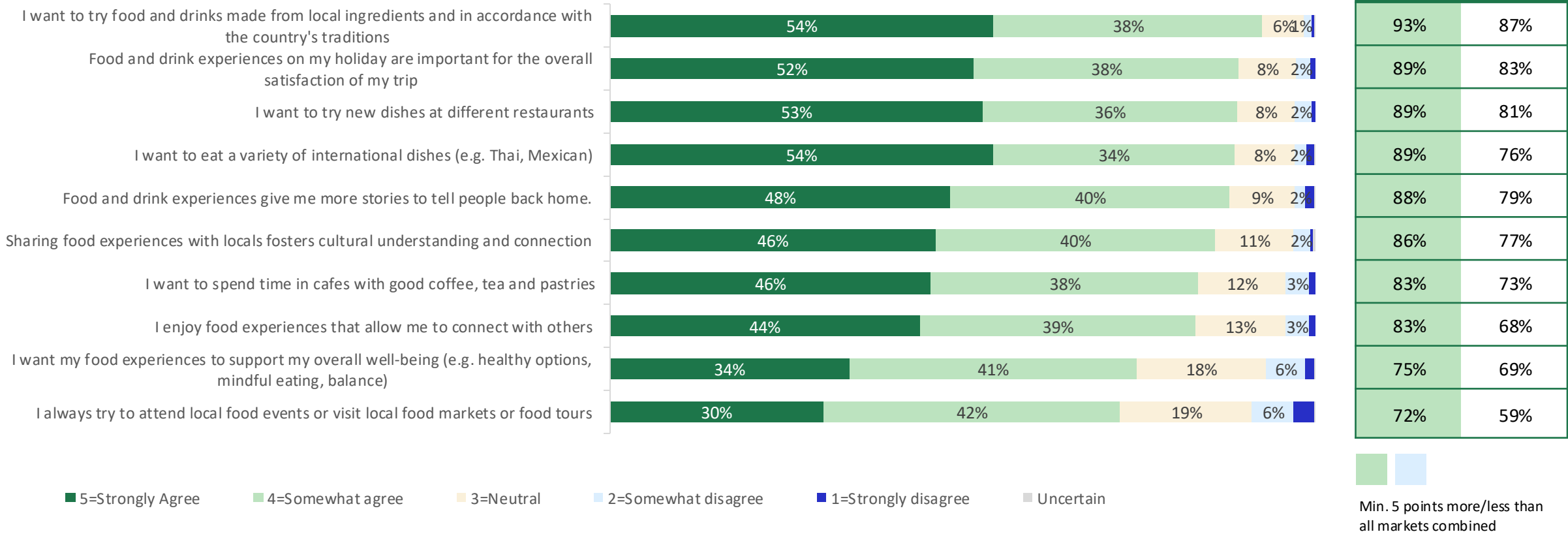
American tourists are interested in a variety of travel themes, including local culture, history, and art. They are clearly more interested in entertainment and shopping than the average in the analogue countries.

Travel Themes



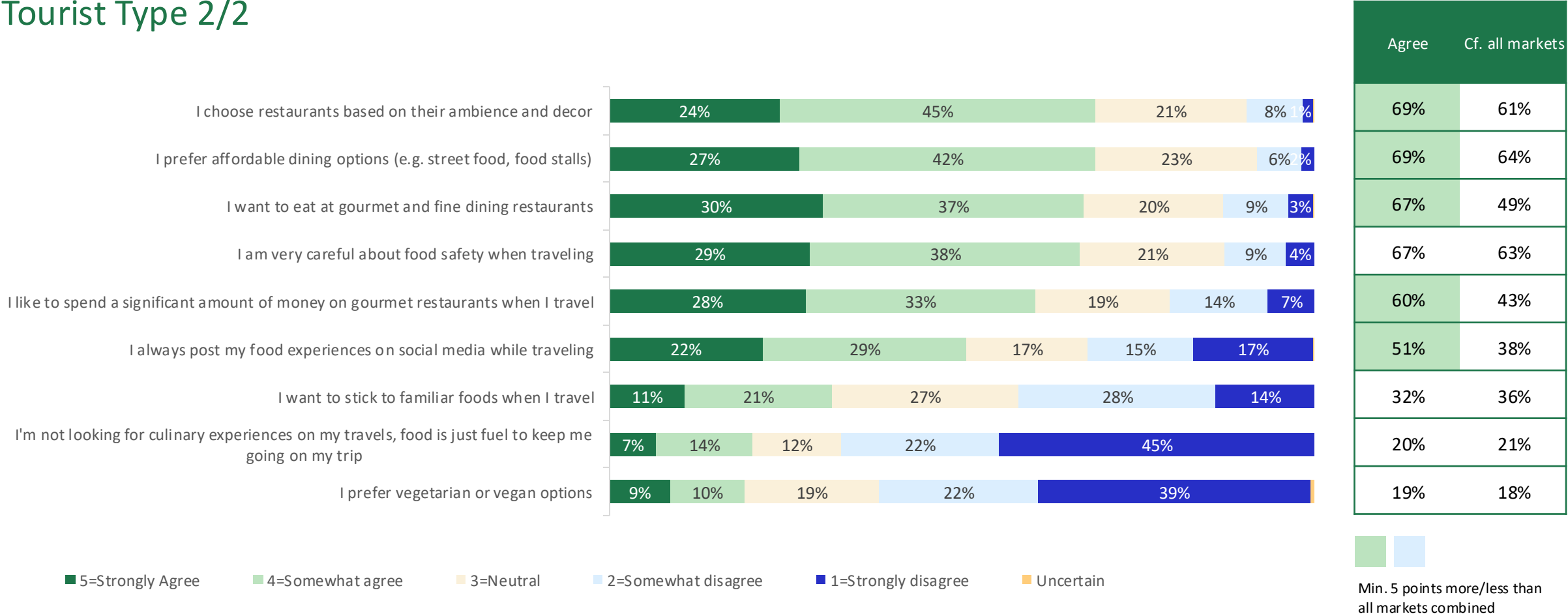
Experimenting with local, international, and new cuisine in general is important for American tourists. Food and drink experiences are an essential part of their holidays.

Tourist type 1/2



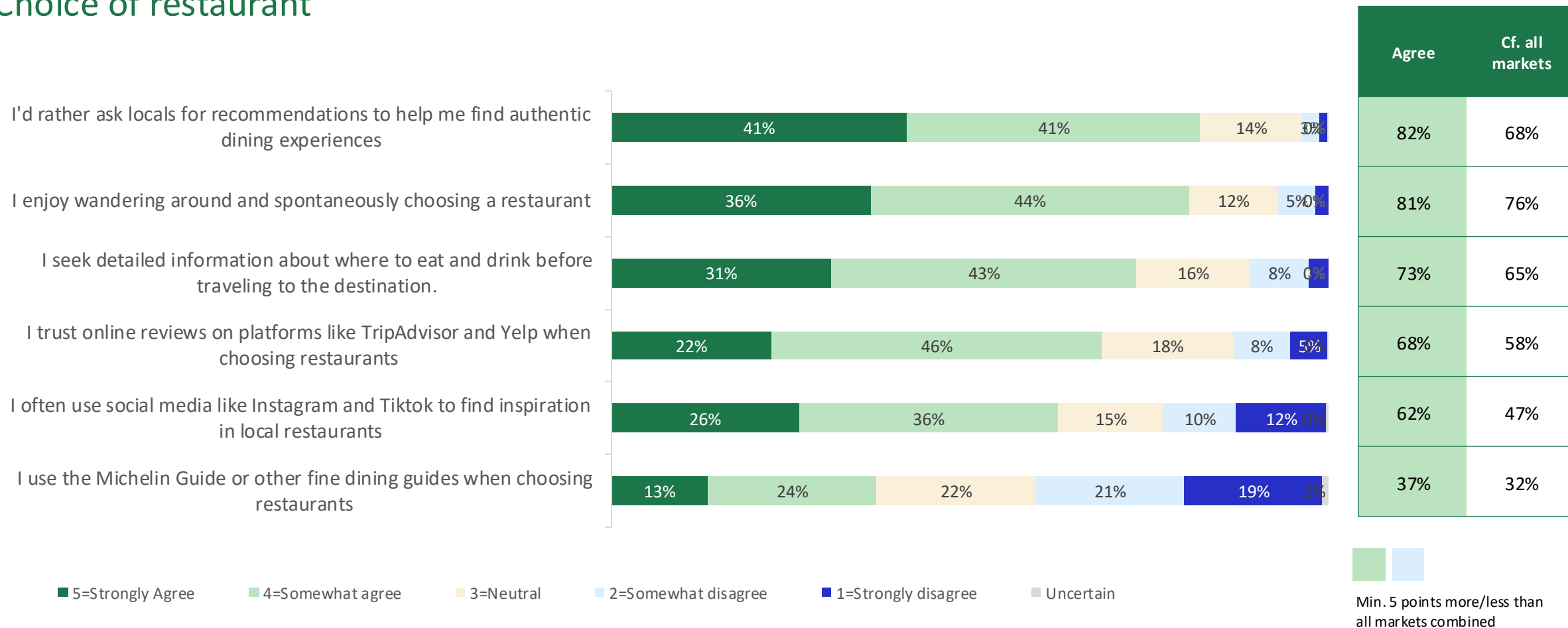
The importance of dining experiences can also be seen in the fact that a large part of them do not see food on the way as just fuel.

Tourist Type 2/2



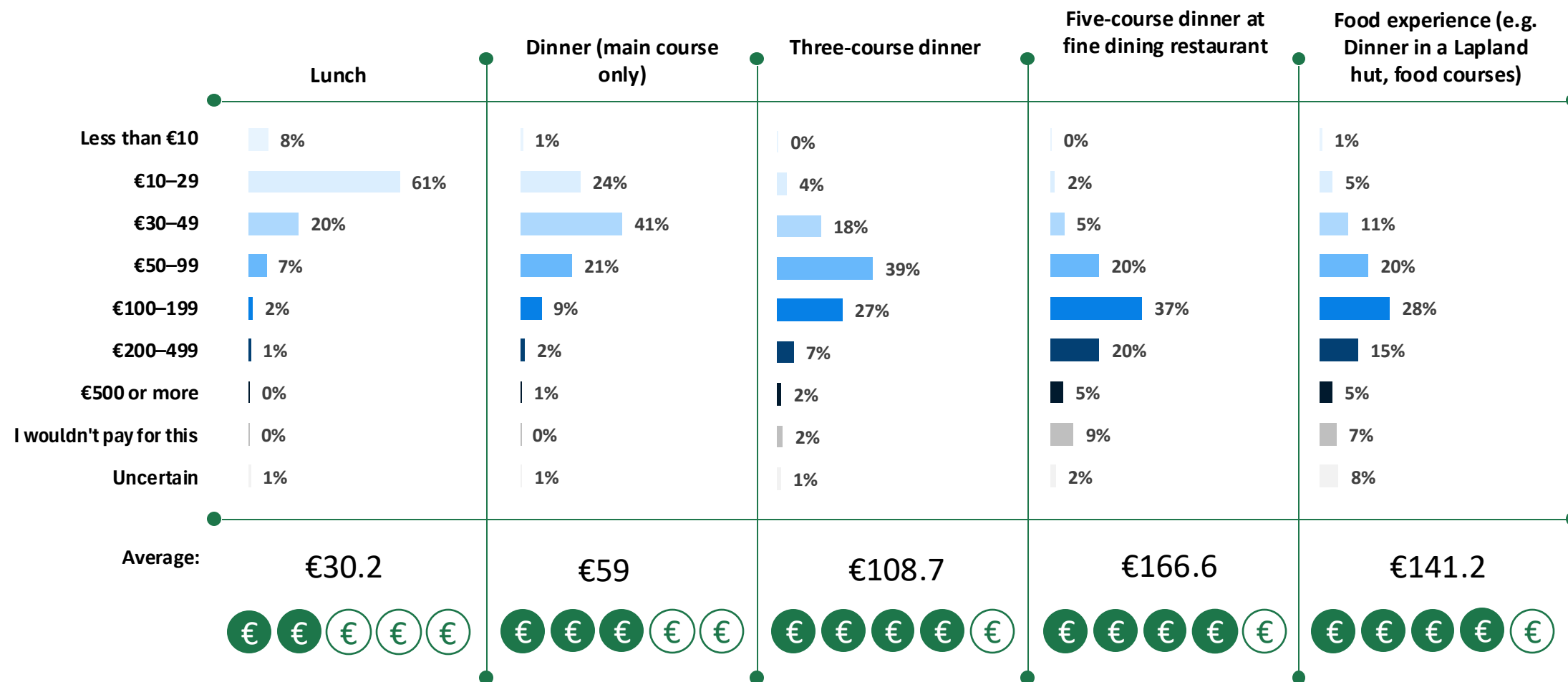
They appreciate both local recommendations and spontaneous wandering and finding things out before the trip in choosing restaurants..

Choice of restaurant



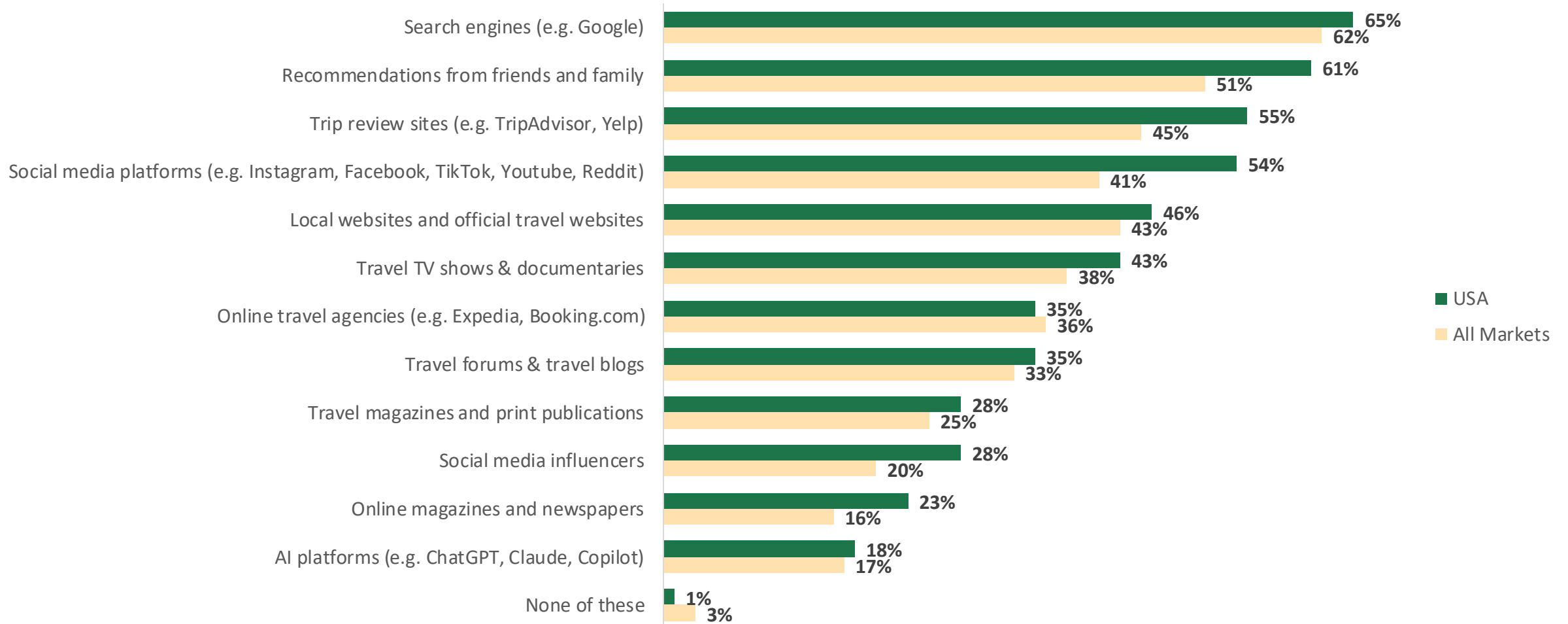
Americans would be willing to pay the most for a five-course dinner at a fine dining restaurant.

Willingness to pay



Search engines are the main source of tourism information. Americans also intensely seek information from friends and family, travel review sites, and social media.

Sources of information



Awareness and attractiveness of destinations

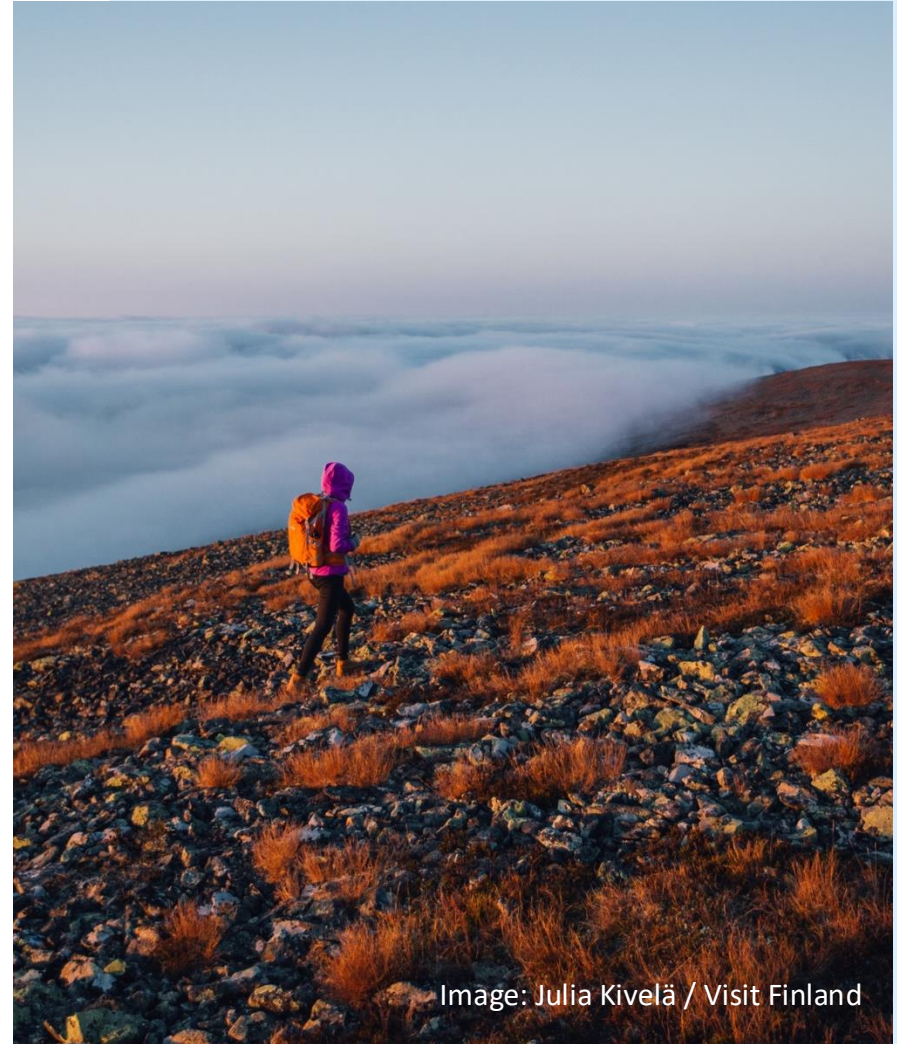
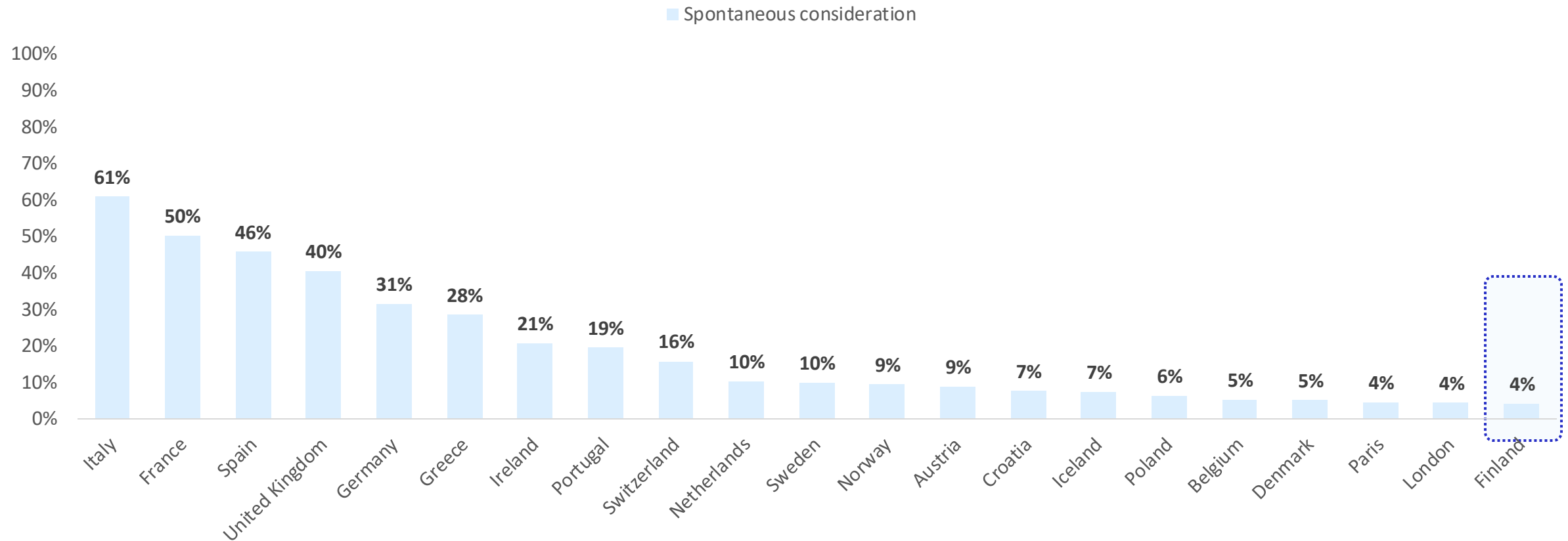


Image: Julia Kivelä / Visit Finland

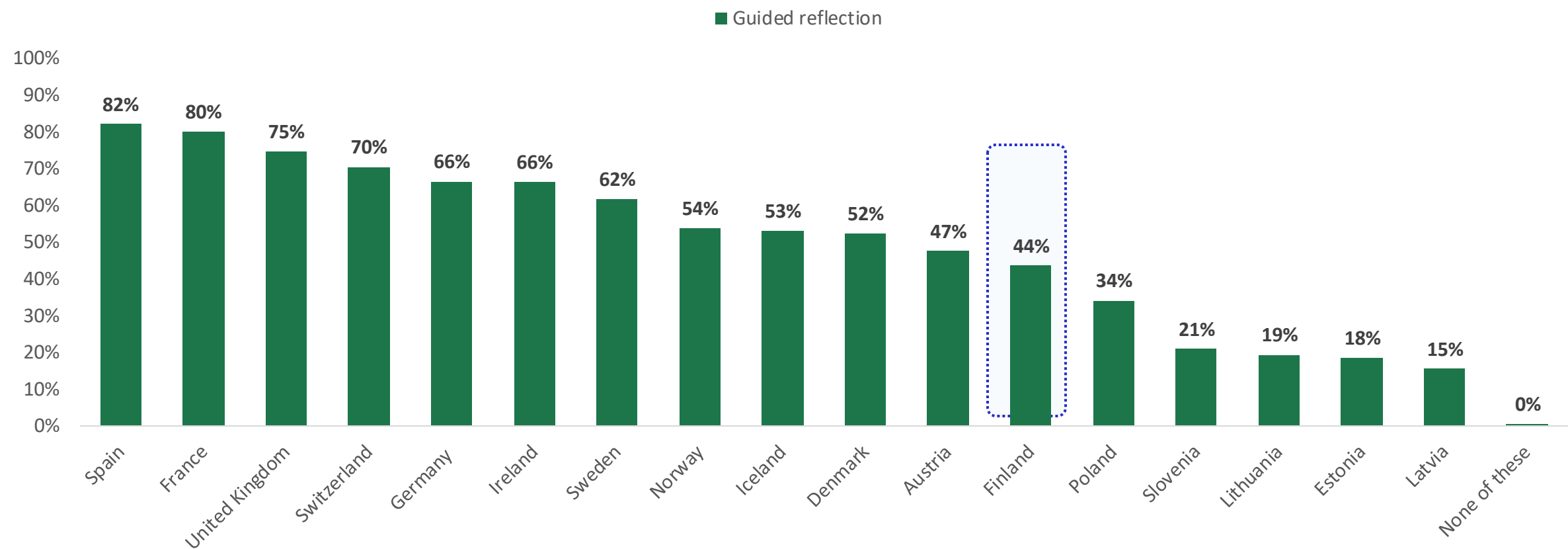
Italy is the most spontaneously considered tourist destination in Europe. Finland and Denmark are on the same level, Sweden and Norway are considered a little more.

Spontaneous consideration



Of the countries listed, Spain and France are the most popular. Sweden is considered a little more than the other Nordic countries, Finland the least.

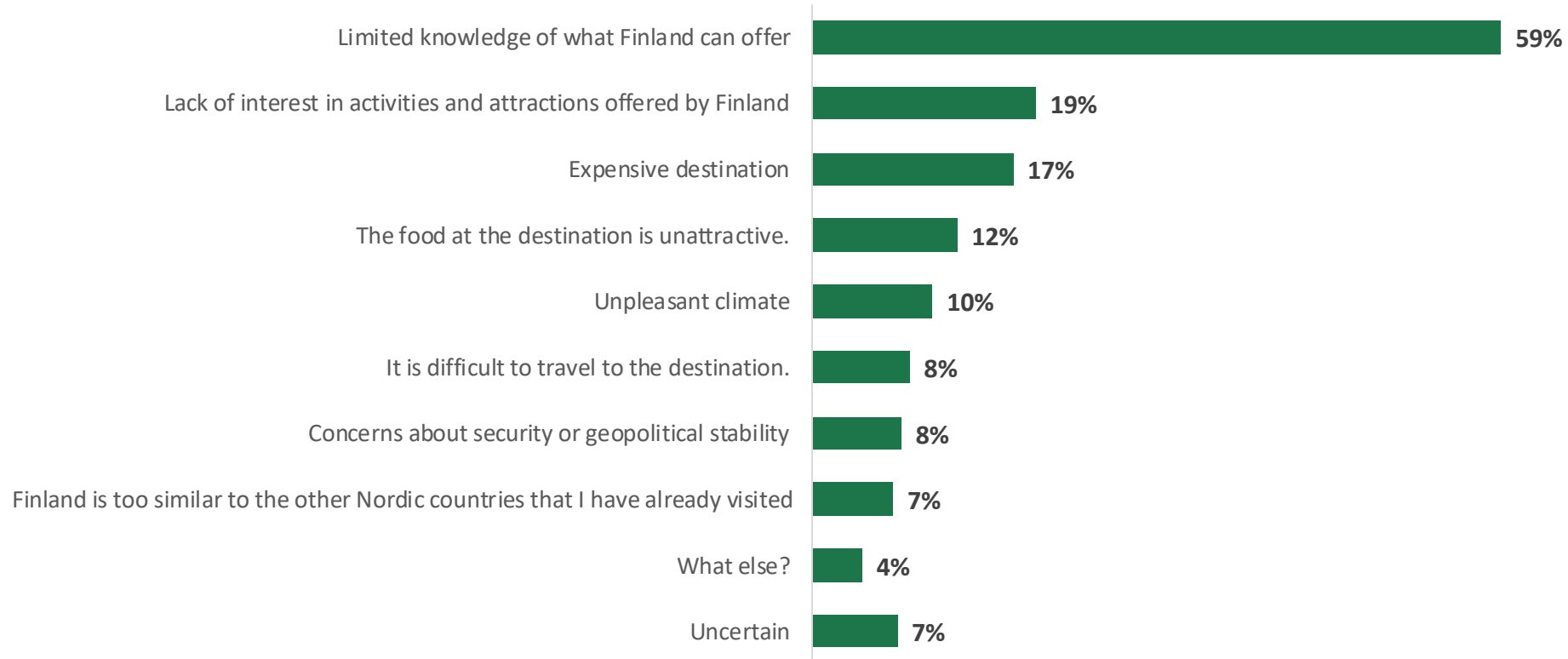
Guided reflection



Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip? (Countries listed)
Respondents: 18–65-year olds planning a holiday in Europe in the next three years 1002 IP

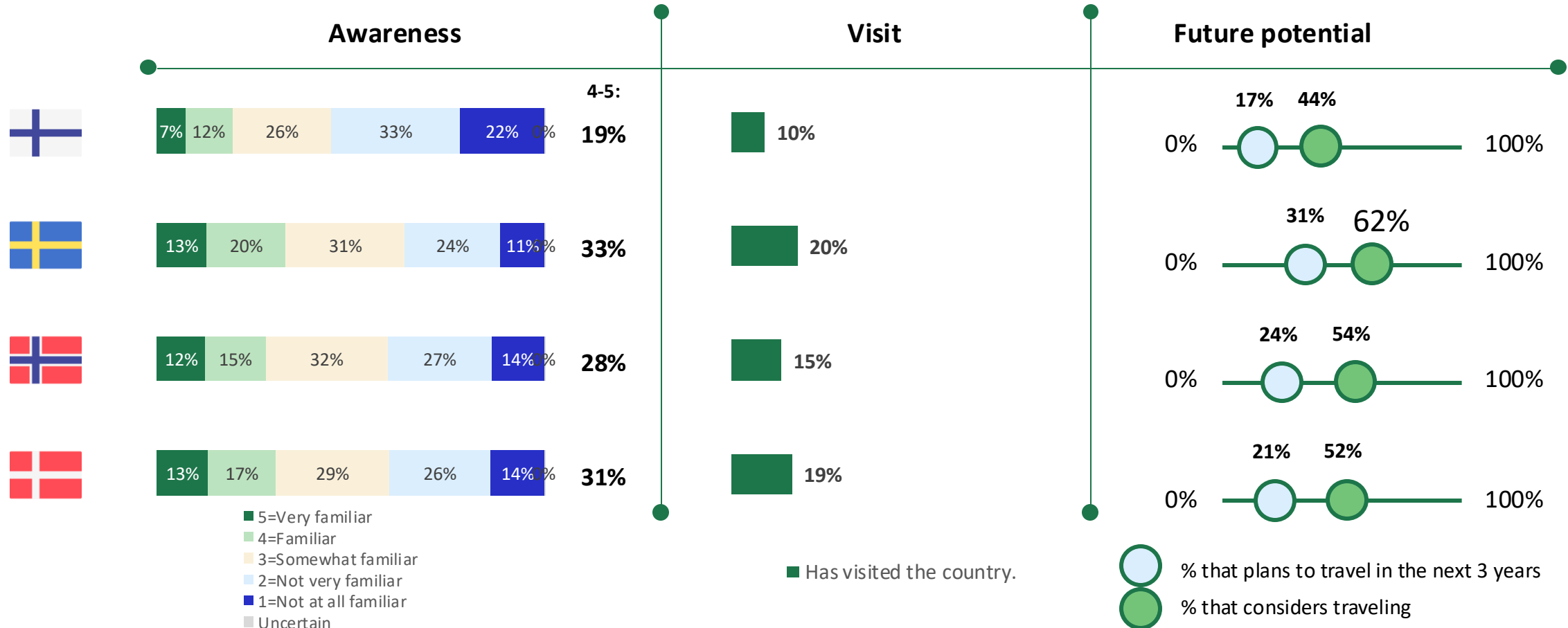
The biggest obstacle to consider Finland is not knowing what Finland can offer tourists.

Obstacles of travelling to Finland



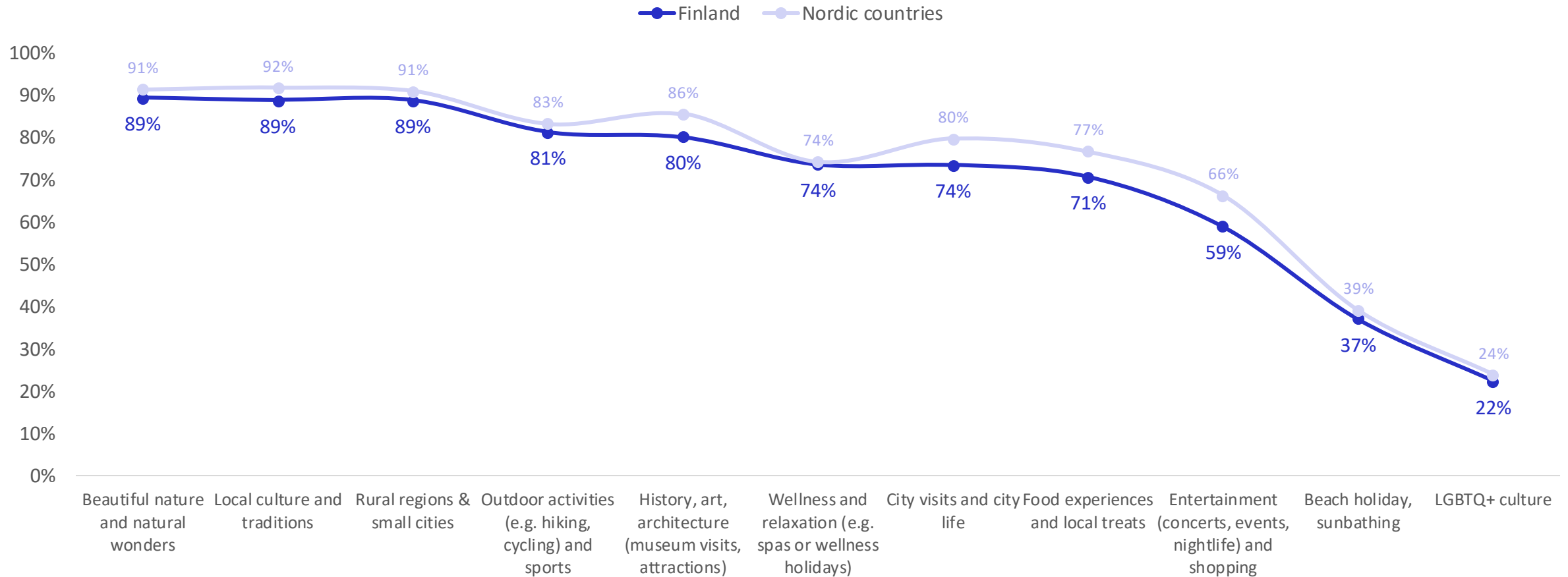
Finland is less known as a travel destination than the other Nordic countries. However, 44% might consider travelling to Finland.

The Nordic Region: awareness, visit and potential for the future



Nature, local culture and the countryside/small towns are travel themes that are common to all Nordic countries.

Linking travel themes to Finland and the Nordic countries



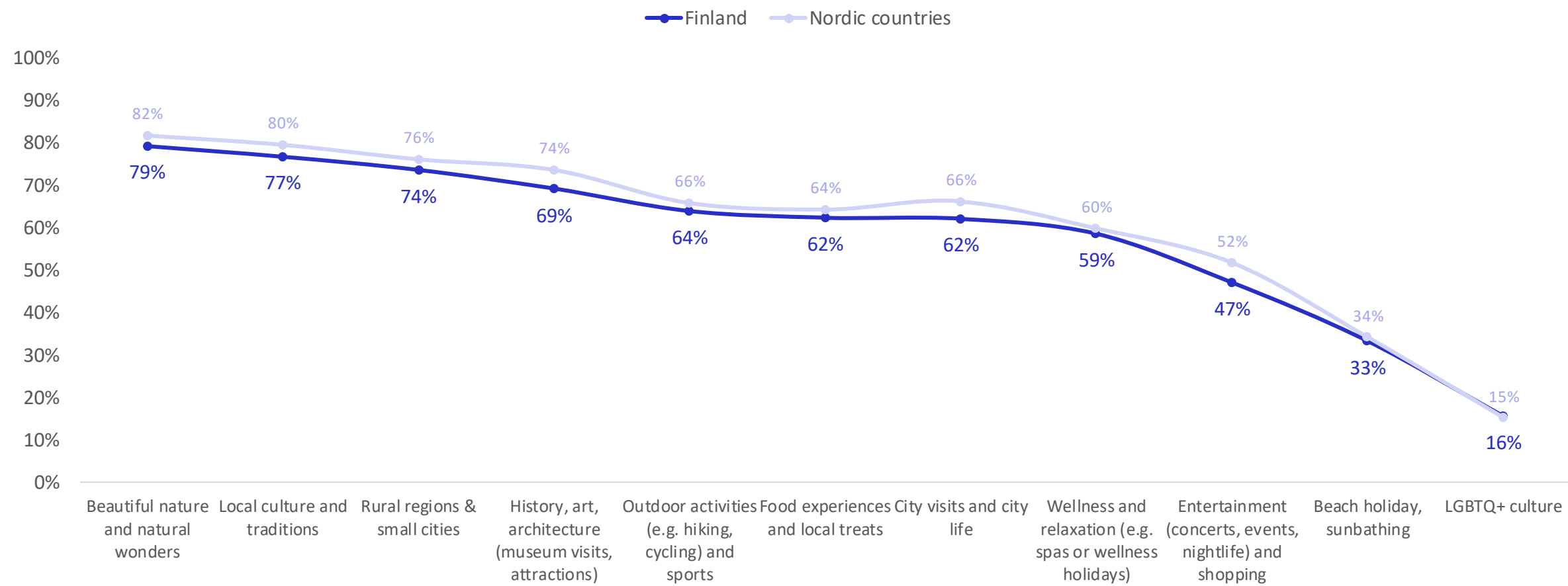
The theme of history, art and architecture has a clearly stronger association with Denmark and Norway than Finland.

Linking travel themes to Finland and the Nordic countries

					Average
Beautiful nature and natural wonders	89%	93%	94%	90%	91%
Local culture and traditions	89%	92%	95%	92%	92%
Rural regions & small cities	89%	94%	91%	90%	91%
Outdoor activities (e.g. hiking, cycling) and sports	81%	85%	86%	81%	83%
History, art, architecture (museum visits, attractions)	80%	86%	88%	89%	86%
Wellness and relaxation (e.g. spas or wellness holidays)	74%	78%	75%	71%	74%
City visits and city life	74%	82%	83%	81%	80%
Food experiences and local treats	71%	78%	78%	81%	77%
Entertainment (concerts, events, nightlife) and shopping	59%	72%	64%	70%	66%
Beach holiday, sunbathing	37%	39%	39%	42%	39%
LGBTQ+ culture	22%	25%	20%	28%	24%

Nature and local culture are the most attractive travel themes in the Nordic countries.

Attractiveness of the Nordic countries by travel theme



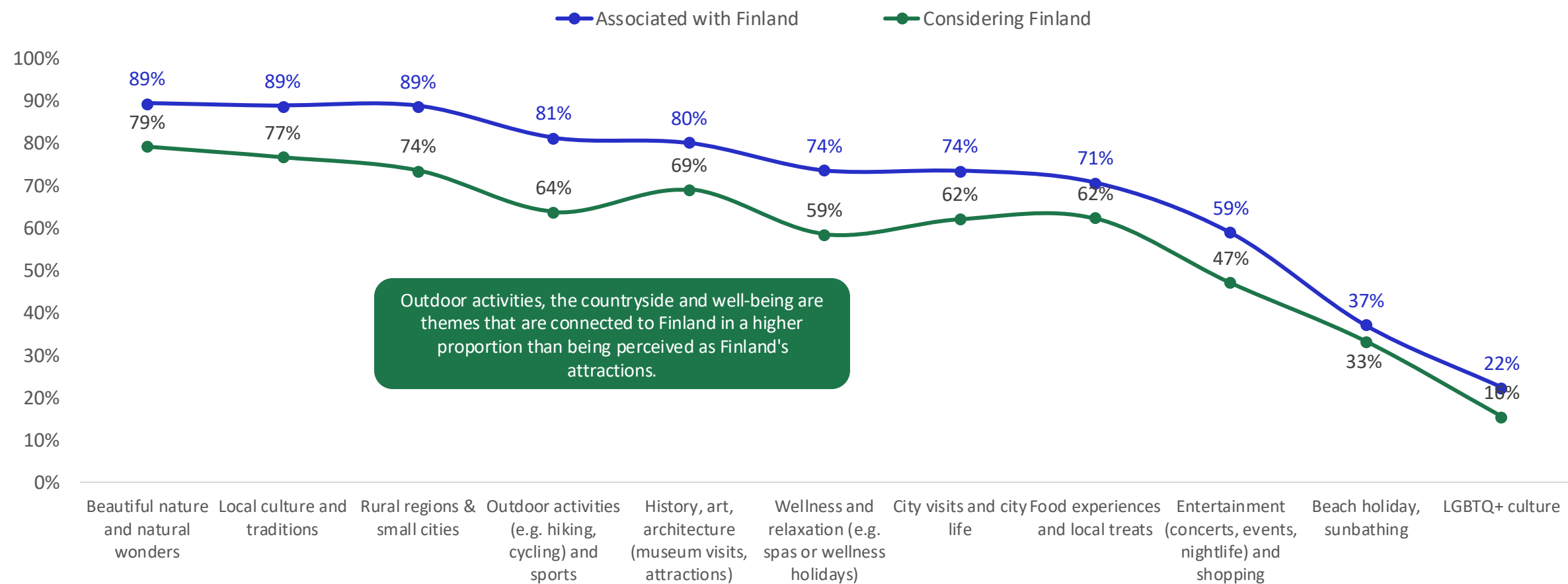
The most attractive travel themes in the Nordic countries are largely on the same level. Norway attracts a little more for outdoor holidays, Sweden and Denmark for city visits.

Attractiveness of the Nordic countries by travel theme

	 Finland	 Sweden	 Norway	 Denmark	Average
Beautiful nature and natural wonders	79%	83%	84%	81%	82%
Local culture and traditions	77%	81%	78%	82%	80%
Rural regions & small cities	74%	77%	77%	77%	76%
History, art, architecture (museum visits, attractions)	69%	75%	74%	76%	74%
Outdoor activities (e.g. hiking, cycling) and sports	64%	67%	70%	63%	66%
Food experiences and local treats	62%	66%	62%	67%	64%
City visits and city life	62%	71%	63%	69%	66%
Wellness and relaxation (e.g. spas or wellness holidays)	59%	62%	59%	60%	60%
Entertainment (concerts, events, nightlife) and shopping	47%	53%	51%	55%	52%
Beach holiday, sunbathing	33%	35%	32%	37%	34%
LGBTQ+ culture	16%	14%	12%	18%	15%

Nature tourism is associated with Finland, and Finland is also thought to be an interesting nature destination.

Merging and attracting travel themes, Finland



Country image: Nordic countries

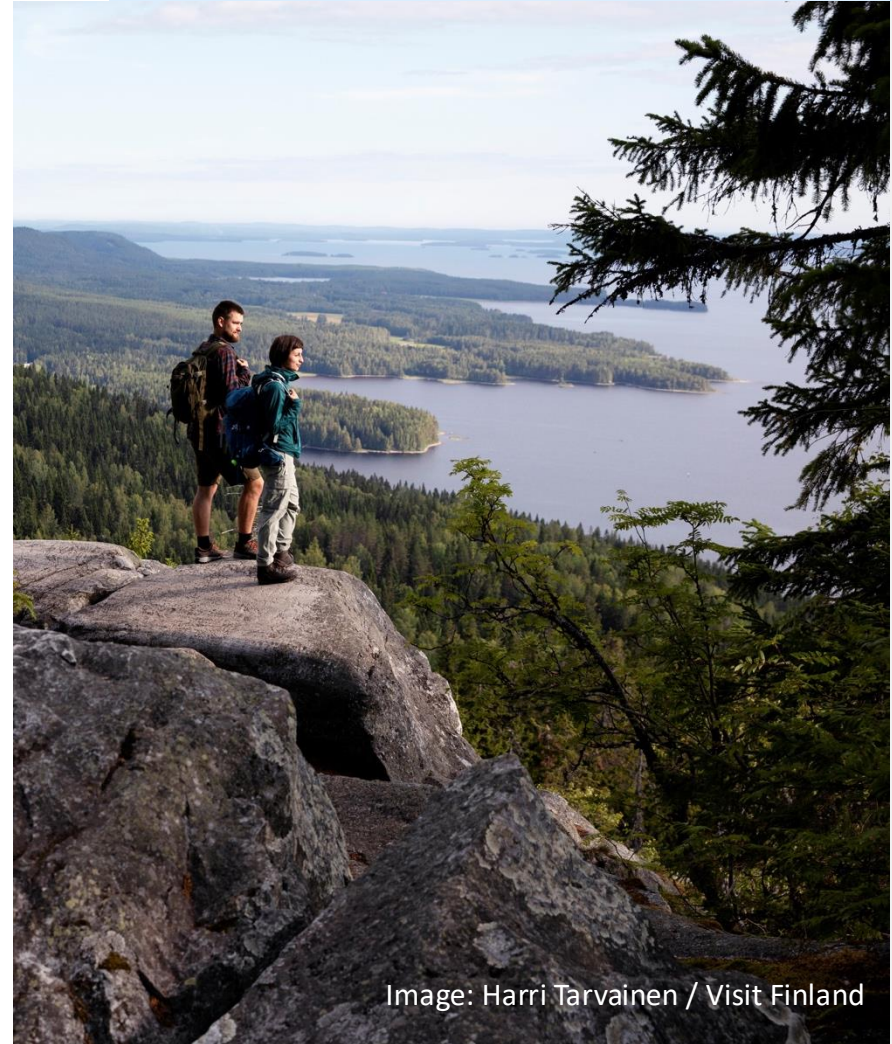
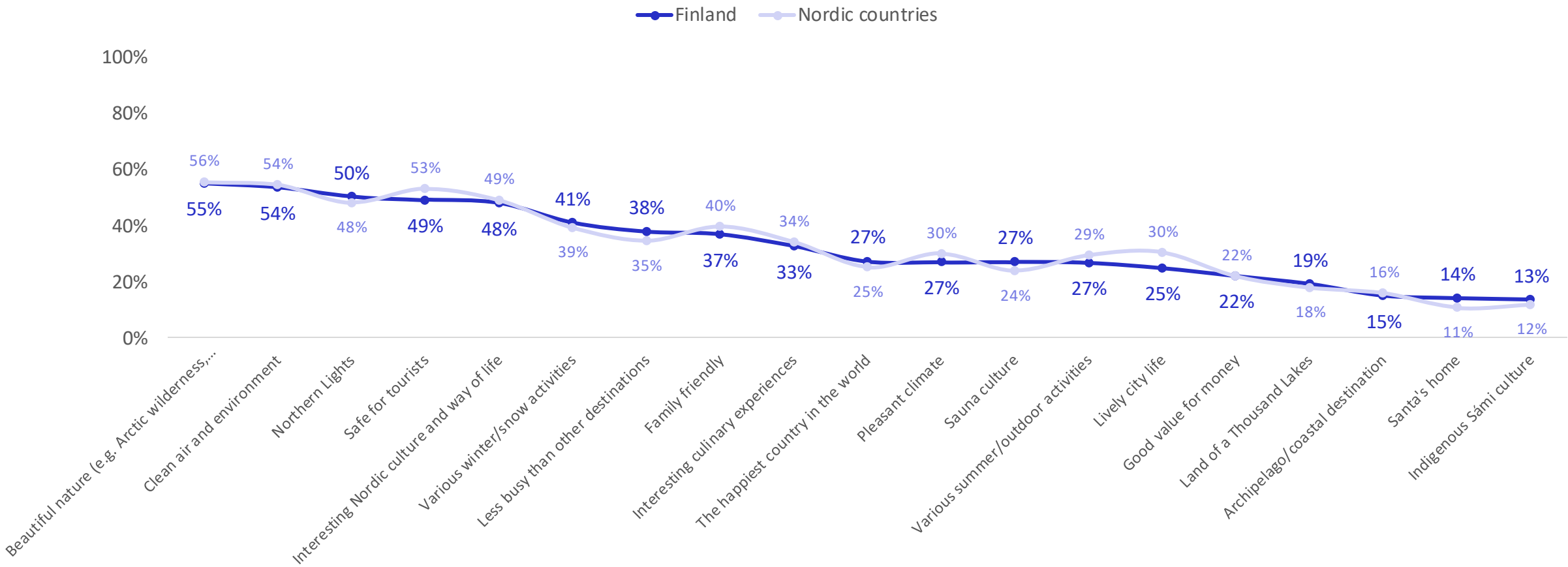


Image: Harri Tarvainen / Visit Finland

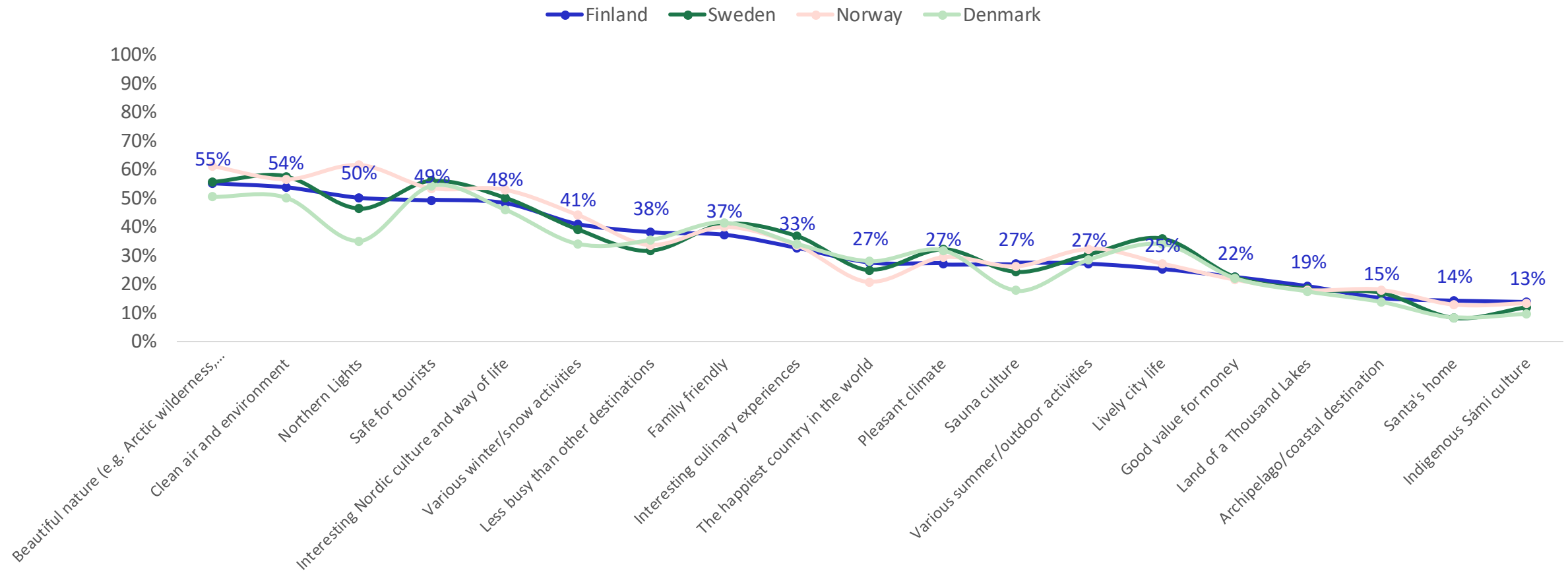
Americans associate both Finland and the Nordic countries most of all with beautiful nature, clean air and the environment.

Country image, Finland vs. Nordic countries



The image of the Nordic countries is very similar. Only the Northern Lights, for example, have a slightly different association between the Nordic countries.

Country image



From Finland's point of view, the most important images are the northern lights, clean air and the environment, Nordic culture and security.

The most important attributes that drive consideration



Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- Which associations are most important for reinforcing consideration?
- What kind of image should be prioritized to boost attraction?
- What image attributes should be monitored at the strategic level in the future?

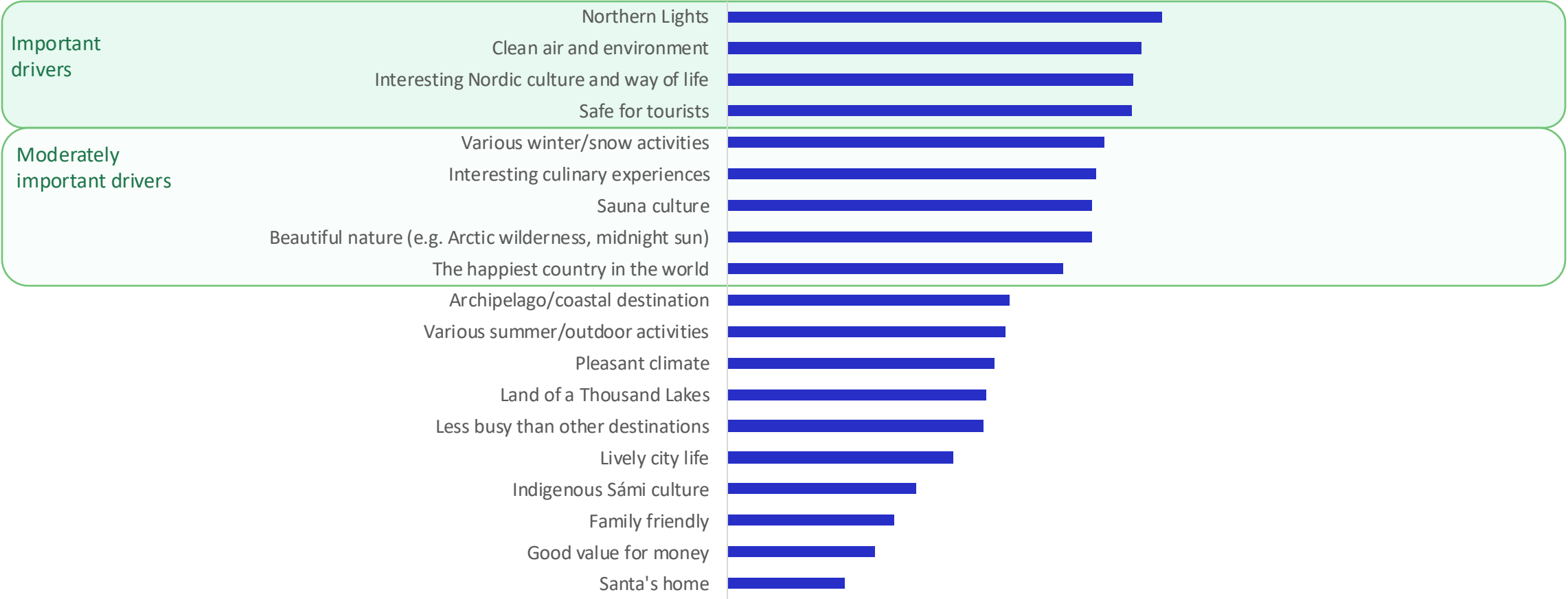
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?(Finland)/Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1002 IP

From Finland's point of view, the most important images are the northern lights, clean air and the environment, Nordic culture and security.

Drivers of consideration

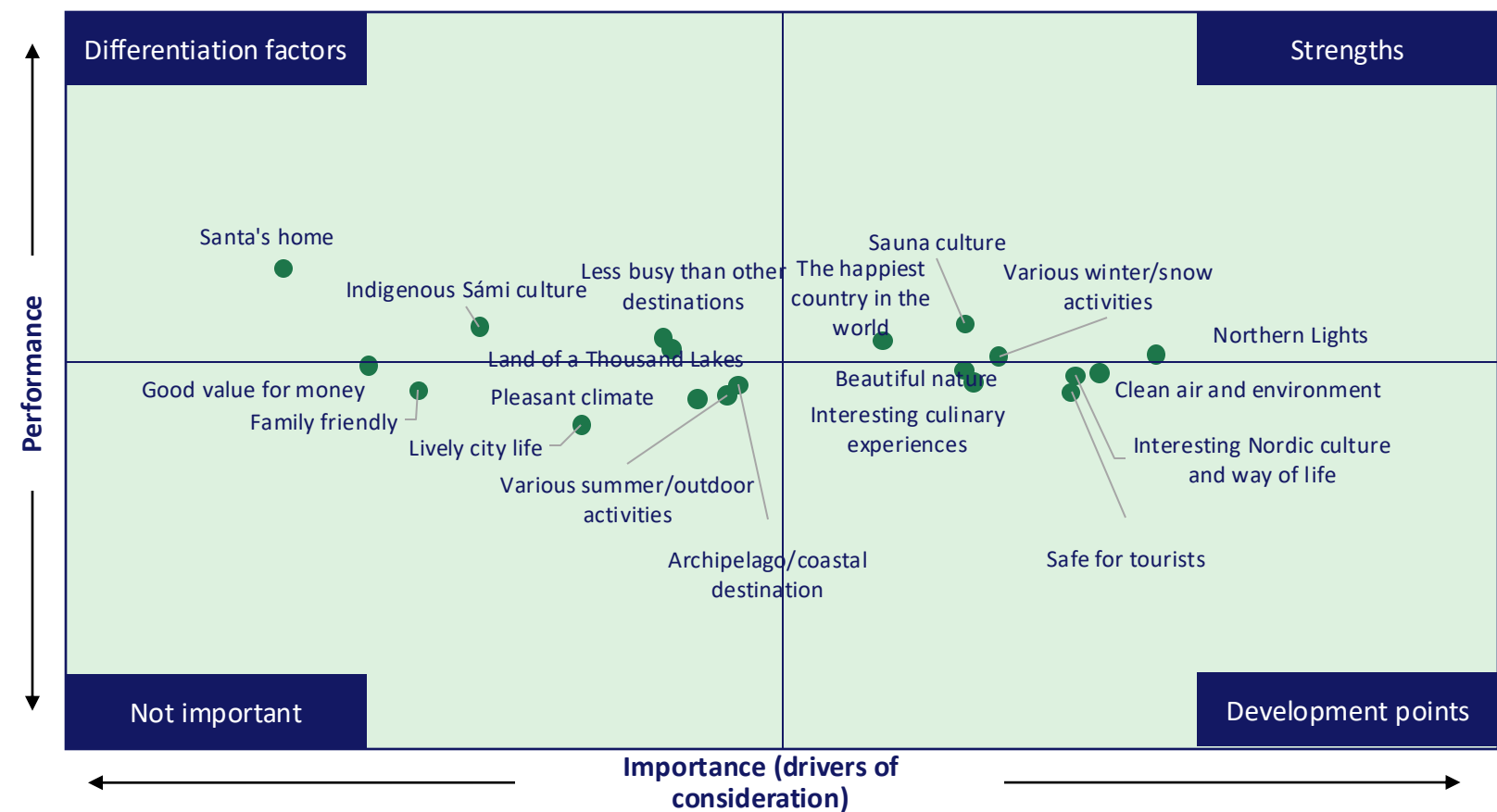


Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.
Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?(Finland)/Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1002 IP

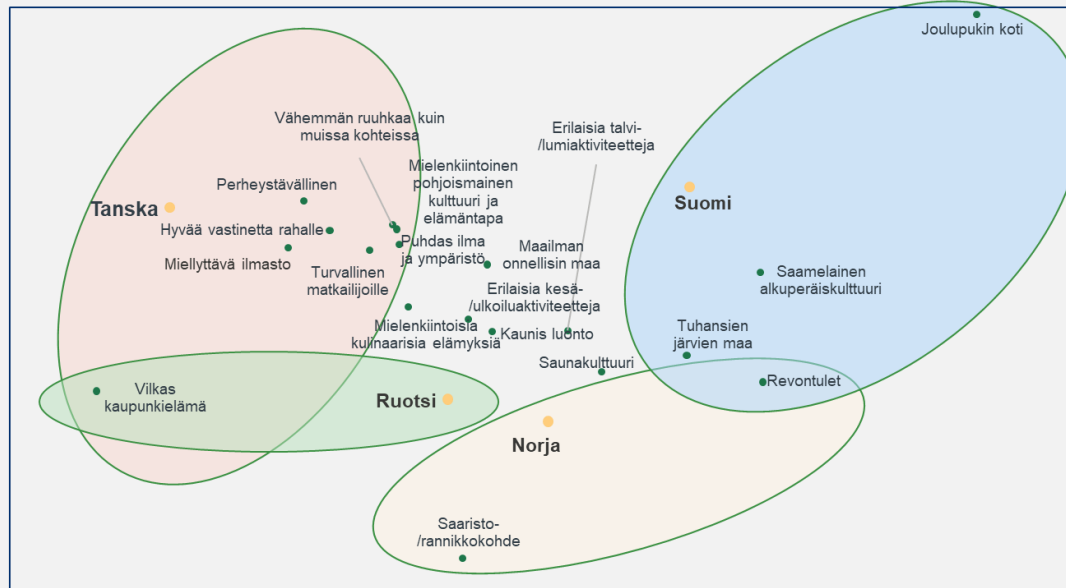
Finland performs very much on the same level as the other Nordic countries in the most important images that guide consideration.

Importance vs. Performance: Country image



- Comments**
- Finland performs concerning the images very much on the same level as the other Nordic countries. This can also be an opportunity to stand out in the future.
 - The most important drivers for consideration that we should choose those to invest in are the Northern Lights, Nordic culture and lifestyle, clean air and the environment, safety and winter activities.
 - Culinary experiences are also a fairly important driver.

HOW TO READ THE MIND MAP



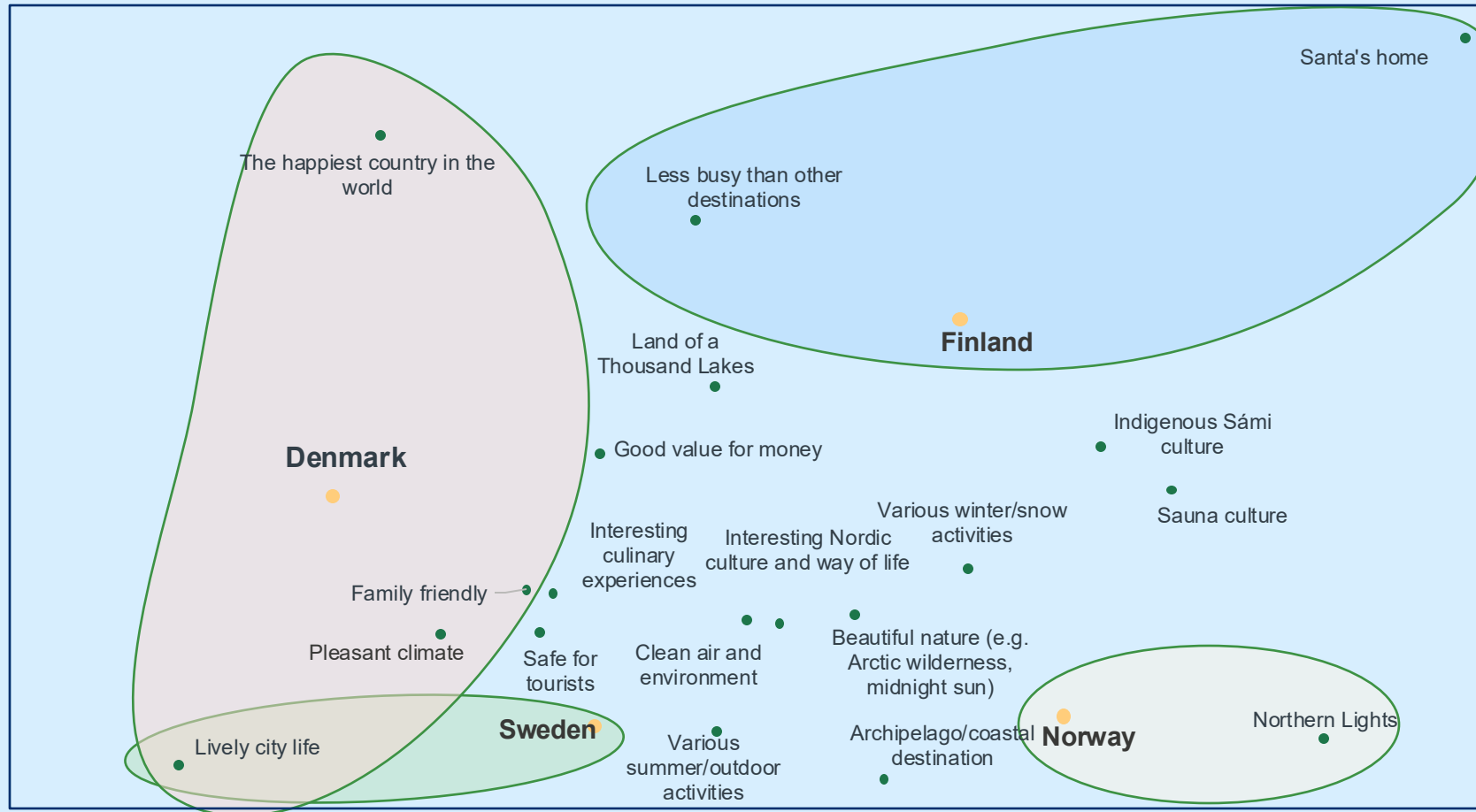
The positioning map visualises how tourists experience different countries and the images associated with them.

It can help identify how different countries and characteristics are grouped in relation to each other and which factors distinguish them from each other.

The highlights drawn on the map illustrate the relative strengths of the countries compared to other countries.

The mind map highlights even small differences – Santa's home and an unhurried lifestyle are somewhat more strongly associated with Finland.

Country image, relative image



Comments

The Nordic image is **very similar in the eyes of** Americans. The map highlights even **very small differences in images**, so do not read too much into the differences.

A slightly higher proportion of **Santa's home and the unhurried lifestyle** is connected to Finland. The Northern Lights are related to Norway and urban life is more strongly related to Sweden and Denmark.

The image and attractiveness of Finnish food



Image: Soili Jussila / Vastavalo / Visit Finland

Finnish cuisine is seen as close to nature, healthy and fresh.

Spontaneous impression of Finnish cuisine

- **Fish and seafood** is the strongest American image of Finnish food, often combined with **naturalness and freshness**.
- Food is seen as **simple, healthy, clean** and **lightly processed**, with an emphasis on local and seasonal ingredients.
- The taste is often considered **milder and less spicy** than in many other cuisines, but some also consider it “strong” and “unique”.
- **Unfamiliarity** is very common, but there is curiosity towards food.
- The food is associated with other Nordic and European cuisines.
- **Pastries and “specialties”** such as rye bread and Karelian pies are mentioned, as well as **game and berries**.
- There are two opinions about variety: **some consider the food rich, others monotonous**.
- Finnish food is considered **expensive and rare** in the United States.

"Less processed"

"Fish-based products"

"I think it's fresh and healthy"

"Unique and different"

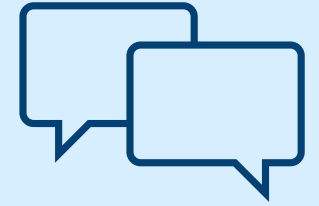
"Fish and meat, maybe mushrooms and vegetables"

"Finnish cuisine is very similar to the other Nordic countries in terms of freshness and taste profile... It's really good."

"Needs more spices"

"I haven't tried it, but I'd like to try it in the future."

"Finnish cuisine seems fresh and healthy, where natural ingredients play the main role. Simpler and less spicy, but unique comfort food compared to others."



Finland is not seen as an interesting food destination, as Americans are unfamiliar with Finnish food or assume that it is not attractive enough.

Reasons why Finland is not seen as a food destination



Fish and Karelian pie are the most tried Finnish dishes

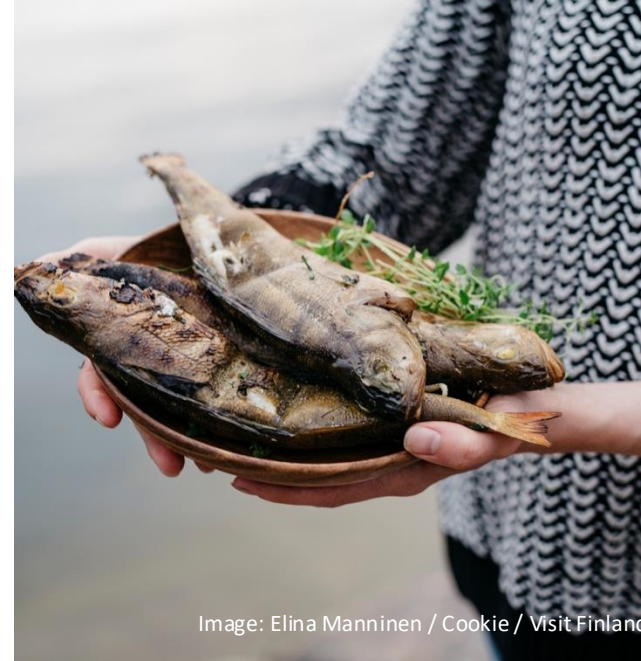


Image: Elina Manninen / Cookie / Visit Finland

Meat dishes

Reindeer meat, Karelian roast and other traditional soups and pots



Image: Harri Tarvainen / Visit Finland

Salmon soup and other fish-based dishes

Smoked, salted, grilled, kalakukko, herring

Bread, pastries and pies

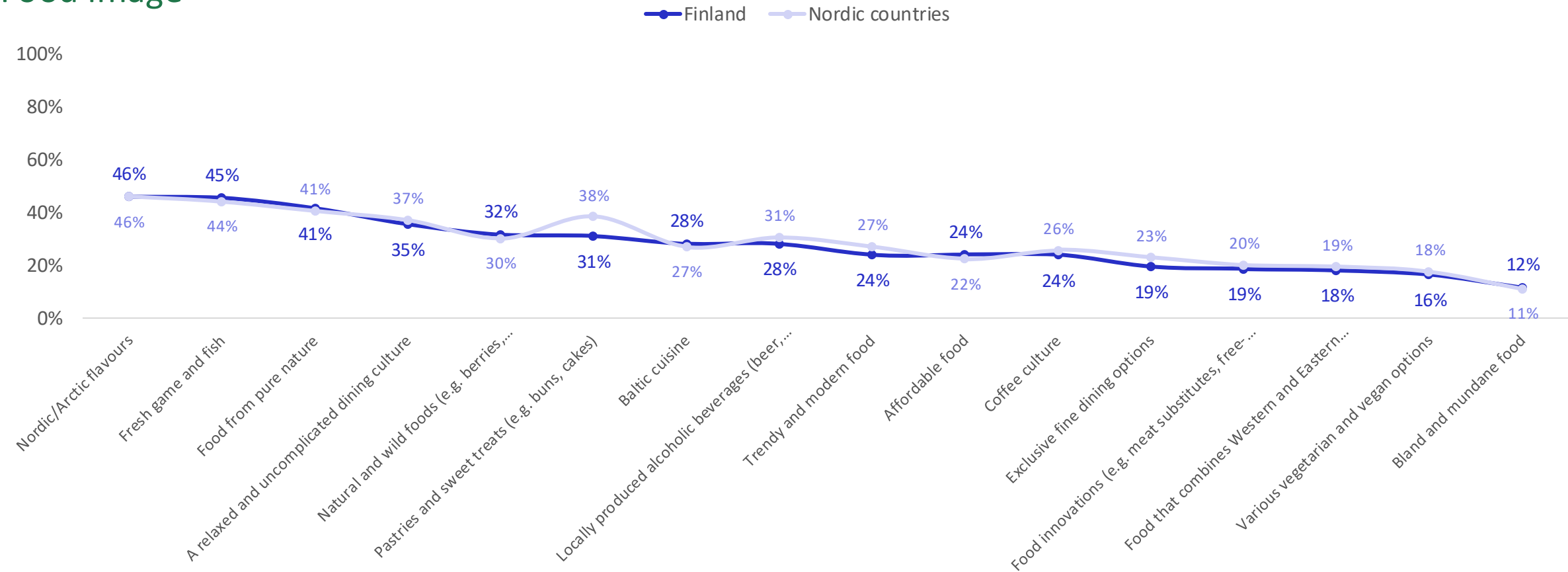
Karelian pie, cinnamon roll, buns, blueberry pie, pancakes, bread cheese, rye bread

Other mentions

Salty liquorice, sweets, coffee

Nordic flavours, along with fresh game and fish are the most common food images associated with both Finland and the Nordic countries. Finland's image is practically no different from that of its neighbours, except for pastries, in which Finland has a weaker association.

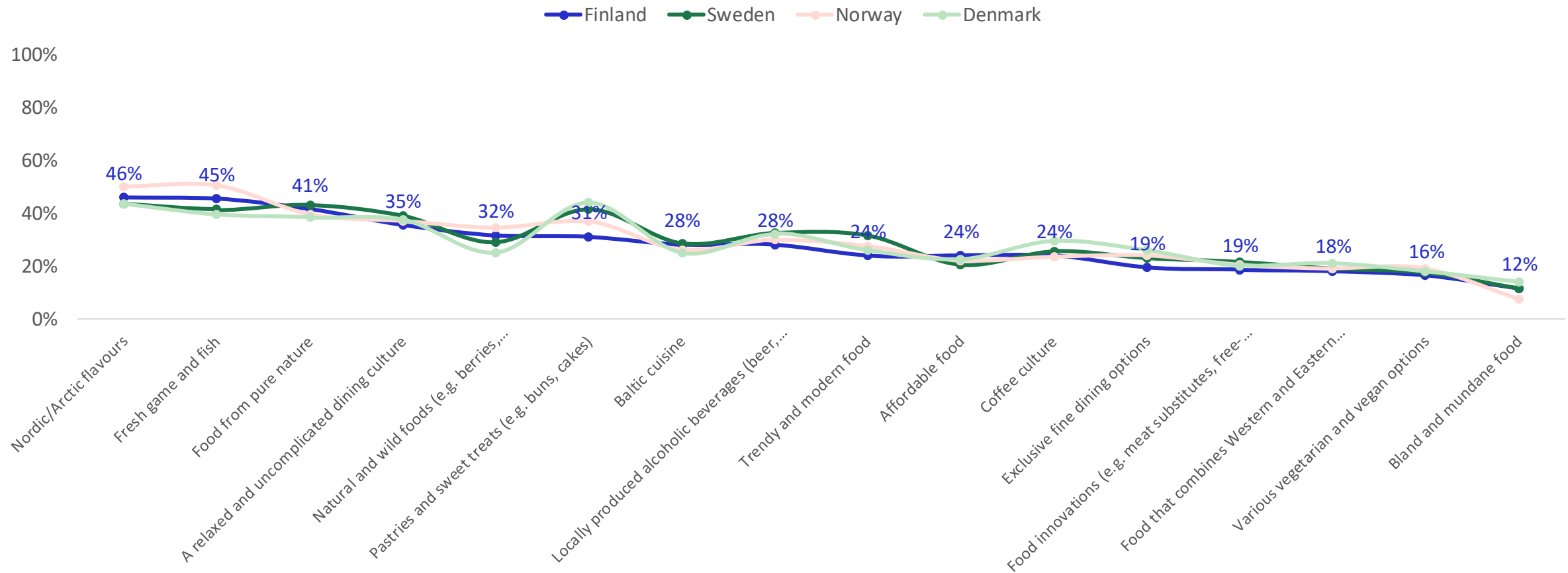
Food image



The food perceptions associated with the Nordic countries are very similar.

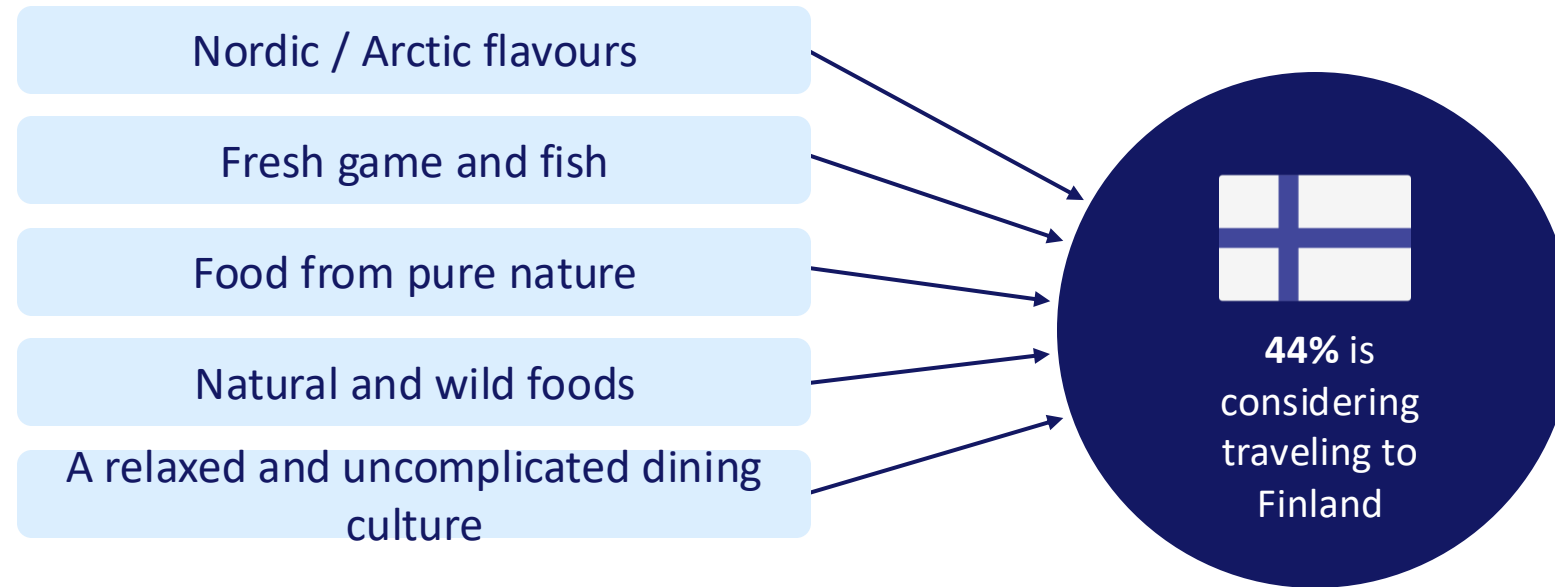
The image of fresh game and fish is associated a little more with Norway.

Food image



Consideration for Finland is most influenced by perceptions of Nordic flavours, fresh game and fish, food from nature and a relaxed dining culture.

The most important attributes that drive consideration



Through correlation analysis, driver analysis identifies the images that most strongly contribute to Finland's consideration as a travel destination.

- Which associations are most important for reinforcing consideration?
- What kind of image should be prioritized to boost attraction?
- What image attributes should be monitored at the strategic level in the future?

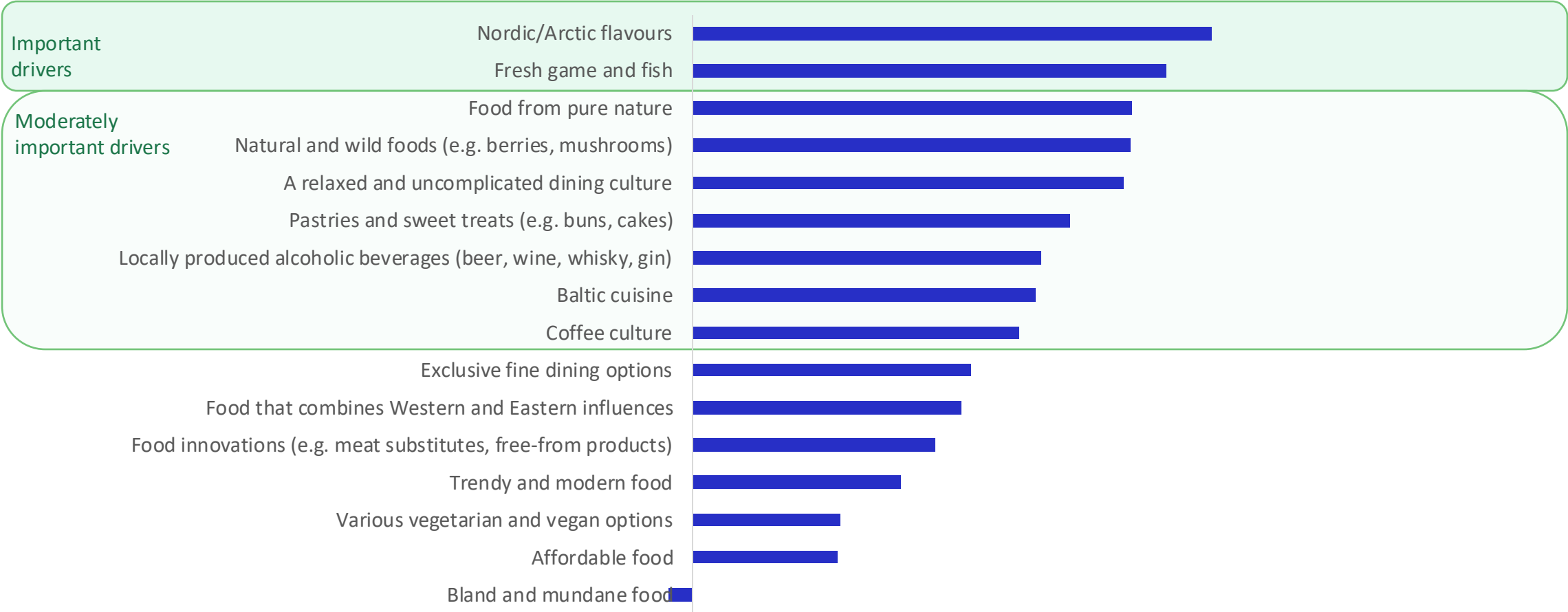
Driver analysis: Correlation between the image of the country and the consideration of the country. The stronger the correlation, the more important the image is for consideration.

Q: Which of the following countries would you ever consider visiting (or revisiting) on holiday or on a short trip?(Finland)/Which of these food-related topics or features do you associate with Finland?

Respondents: 18–65-year-olds planning a holiday trip in the next three years 1002 IP

Finland's consideration is influenced not only by the most important drivers, but also, for example, by pastries and local alcoholic beverages.

Drivers of consideration



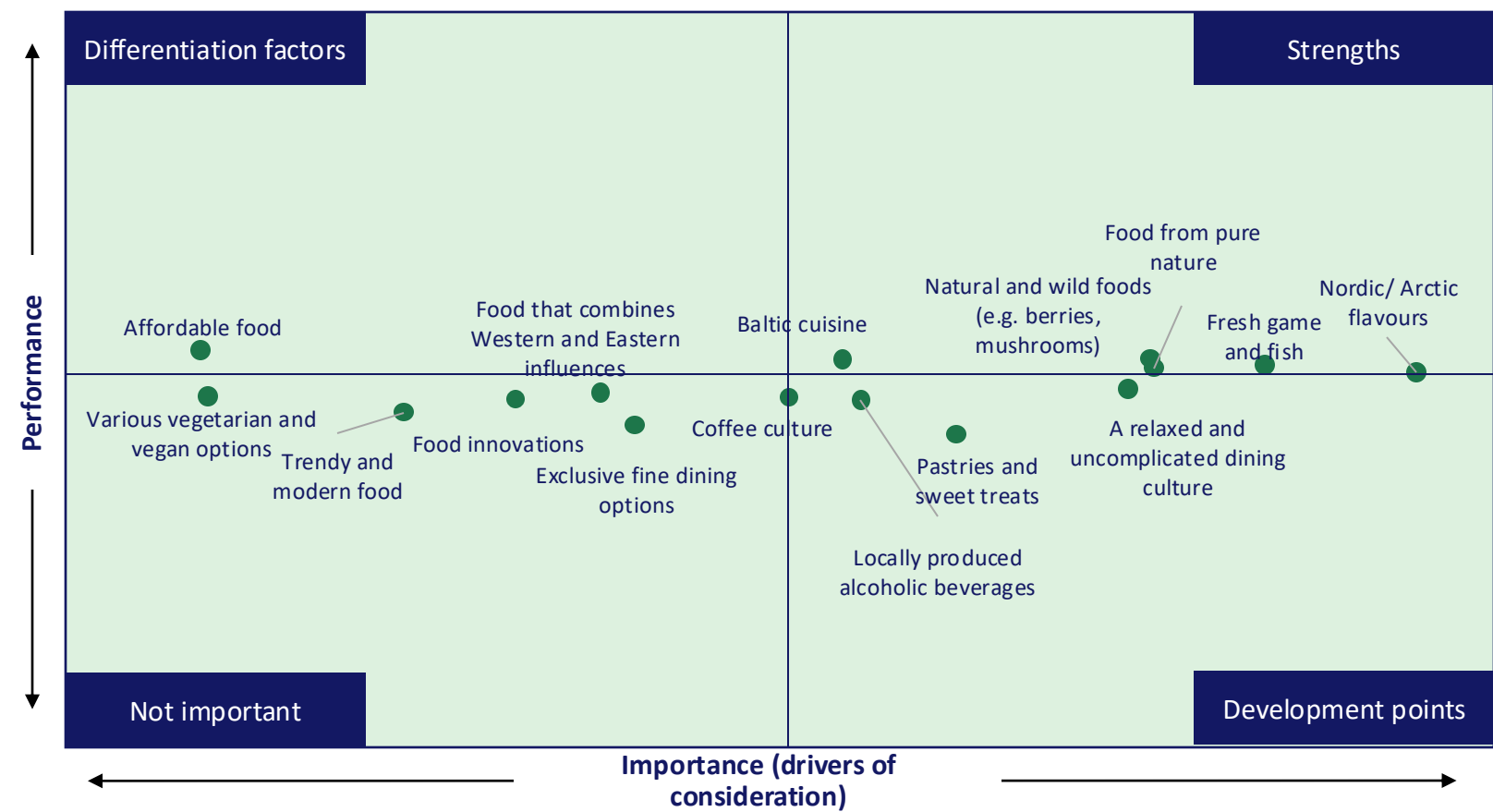
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Respondents: 18–65-year-olds planning a holiday trip in the next three years 1002 IP

Trendy food, fine dining and relaxed eating are the most important factors to consider Finland, which can be communicated to a wider American audience.

Importance vs Performance: Food image



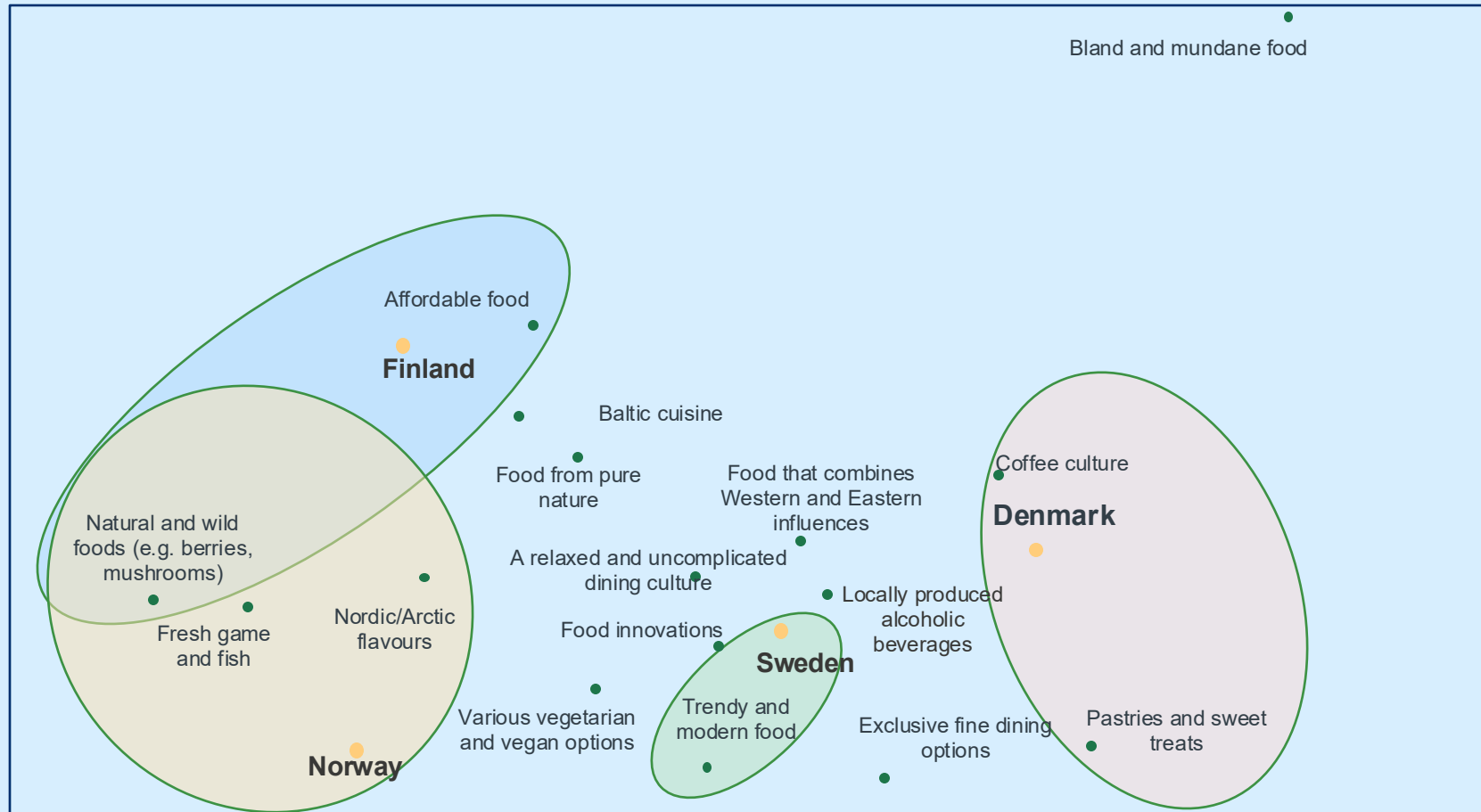
Comments

The most important food images for consideration are Nordic flavours, fresh game and fish and food from nature.

In these images, Finland does not stand out from the other Nordic countries. By reinforcing these images, Finland can address an even wider American audience.

The image of Finland focuses slightly more on inexpensive food as well as natural food.

Food image, relative image



Comments

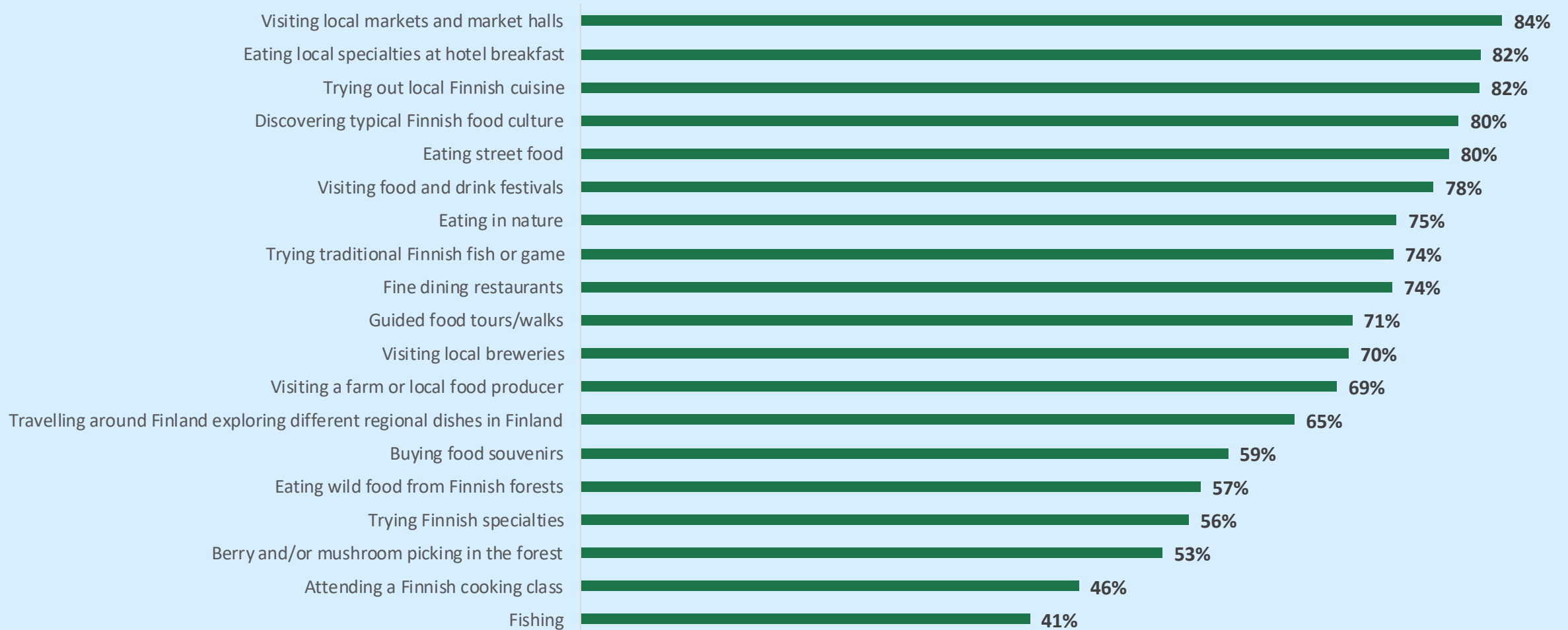
On the whole, the food image of the countries is close to each other, without any distinctive image positions.

In relative terms, Finland is considered to be a slightly more affordable country and also a country offering wild food.

Norway stands out for its arctic flavours and fresh game/fish, for example.

Denmark is profiled as a country of coffee and pastry culture, and Sweden has a slightly higher association with trendy food in proportion.

American tourists would love to try several food experiences, such as visiting markets/market halls, eating local specialties at a hotel breakfast, and tasting local dishes.



Americans' favourite photos include people eating, at the market, or in a café. Relaxed meal photos are almost as popular.



41%



40%



39%



36%



36%



31%



19%



16%



10%

What influenced the selection of your favourite photos?

The Americans chose their favourite images on the grounds that they presented delicious and attractive food in a beautiful, close to nature and relaxed environment that emphasizes togetherness, authenticity, and the opportunity to experience something new and experiential. The mood and likability of favourite photos were also important selection criteria.

Appendices