2022 FINLAND

PORTRAIT OF AMERICAN INTERNATIONAL TRAVELERS™

50 YEARS FORWARD
INTEGRITY IN TOURISM USTOA
United States Tour Operators Association

MMGY Travel Intelligence

Methodology

MMGY Global conducted the third annual national survey of American international travelers. In order to qualify for the survey, respondents had to:

- Have an annual household income of $100,000 or more
- Have taken at least one vacation outside of North America during the past three years
- Expect to take at least one vacation outside of North America during the next 12 months

An online survey was conducted from July 11 through July 28, 2022 and received a total of 2,024 responses. Respondents were selected randomly and participated in a 20-minute online survey. The sample has been weighted based on age, gender, ethnicity, household income, geography and education to ensure the data is representative of American households with annual household incomes of $100,000 or more.

This report focuses on international travelers who express an interest in visiting the Finland during the next three years. This group is referred to as Finland Prospects. There were a total of 382 respondents who met this criteria. Throughout the report, we compare results of this group to results from 2019 (where applicable) as well as compared to Non-prospects (travelers who are not interested in visiting Finland), totaling 1,642 respondents.

INTERNATIONAL TRAVEL OUTLOOK

Despite the rising cost of travel and global current events, international travel is poised to increase among this international traveling audience.

When viewing this report, it is important to keep in mind that these results are among travelers with higher incomes ($100K+) who have indicated that they plan to travel outside of North America during the next 12 months and have traveled internationally during the past three years. In other words, they are experienced, active international travelers.

In July of 2022, these travelers reported an intent to take 3.8 international vacations during the next 12 months, which is up from the 2.2 they reported in 2019. Additionally, they anticipate spending 16% more than their pre-pandemic average annual spend.

This audience's appetite for international travel is extensive. Given their expressed intent to take an international trip, they don't seem to be too stifled by current events like inflation and COVID-19, but that isn't to say they don't have some concerns. Their top concern is related to travel disruption at airports such as flight cancellations or delays. Travel disruption is a concern shared equally across all generations, whereas other concerns such as inflation and COVID-19 appear to have more of an impact on younger travelers. Personal safety as it relates to violence and unrest is the next biggest concern behind travel disruption.

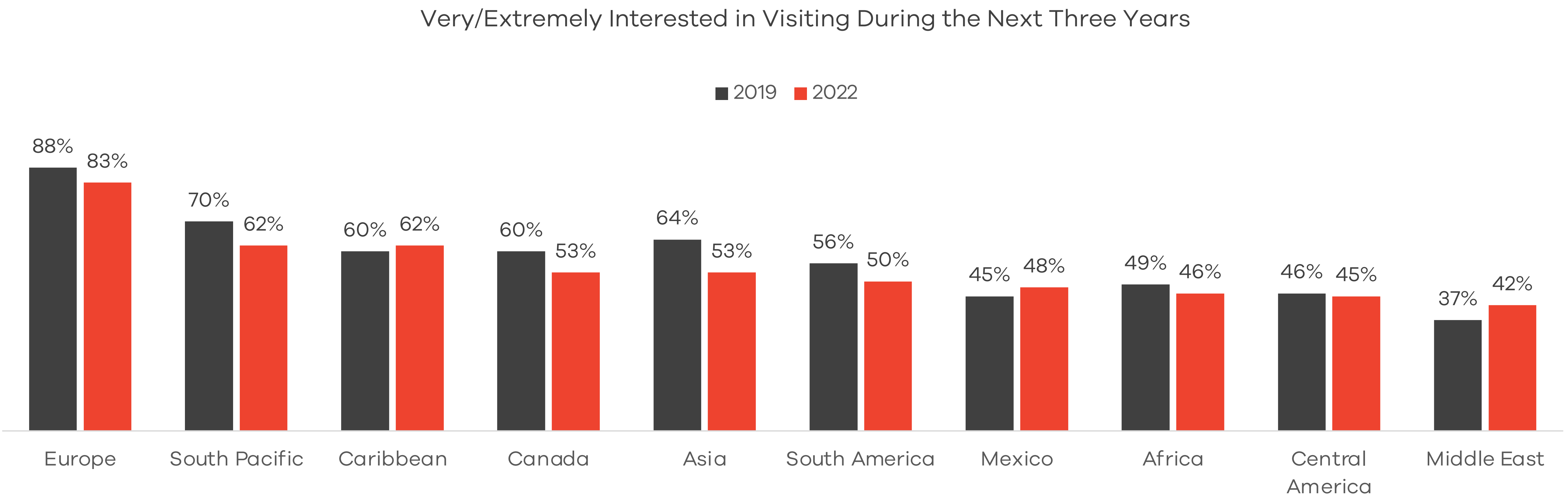
While these concerns aren't keeping this group from traveling internationally, it's possible that it is affecting the destinations they want to visit. Interest in visiting most destinations is down from 2019, perhaps suggesting that travelers have a more select list of destinations. Due to the pandemic, some travelers indicate that they are choosing to visit less crowded destinations or destinations that offer more outdoor activities. And given the rising cost and current state of air travel, travelers could be choosing to visit closer destinations or ones to which they can fly nonstop. Additionally, the war in Ukraine could be playing a role as personal safety is cited as one of the largest influences when choosing a destination.

So, while it is clear that there is willingness and excitement to travel internationally, international destinations need to be mindful of the challenges that their specific audience faces.

Finally, U.S. international travelers are currently enjoying a favorable exchange rate due to the high value of the dollar. The effect could be less significant for this group with higher household incomes, yet it likely will result in higher spend (in local currency) in the destination.

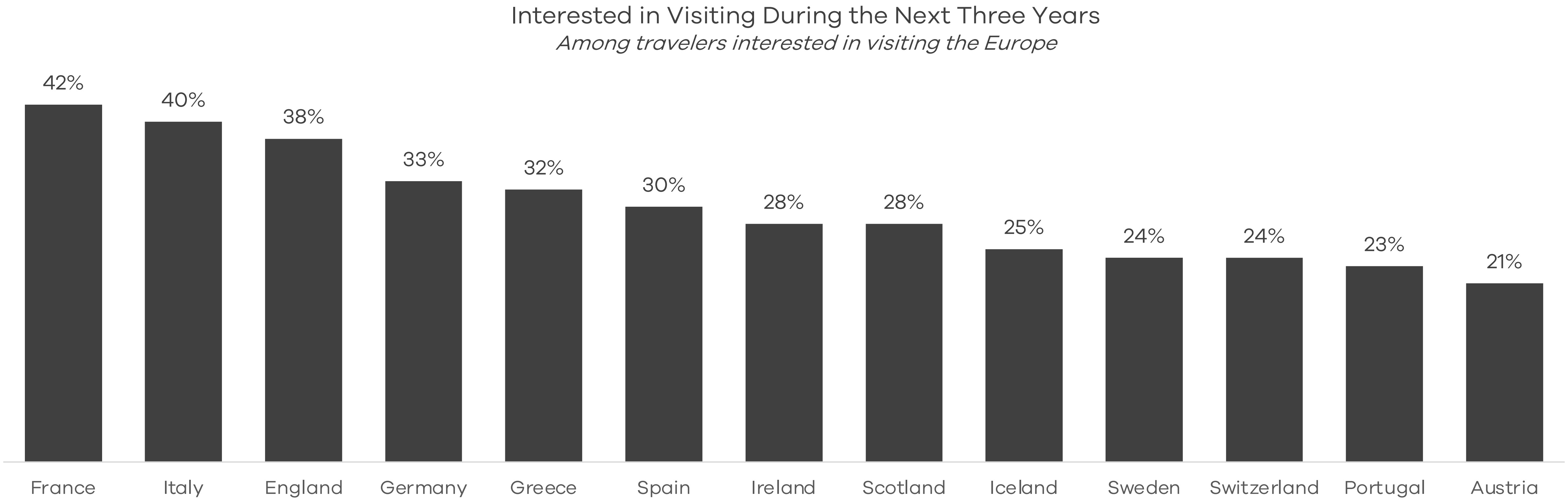
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Interest in visiting most destinations is down from 2019 levels.



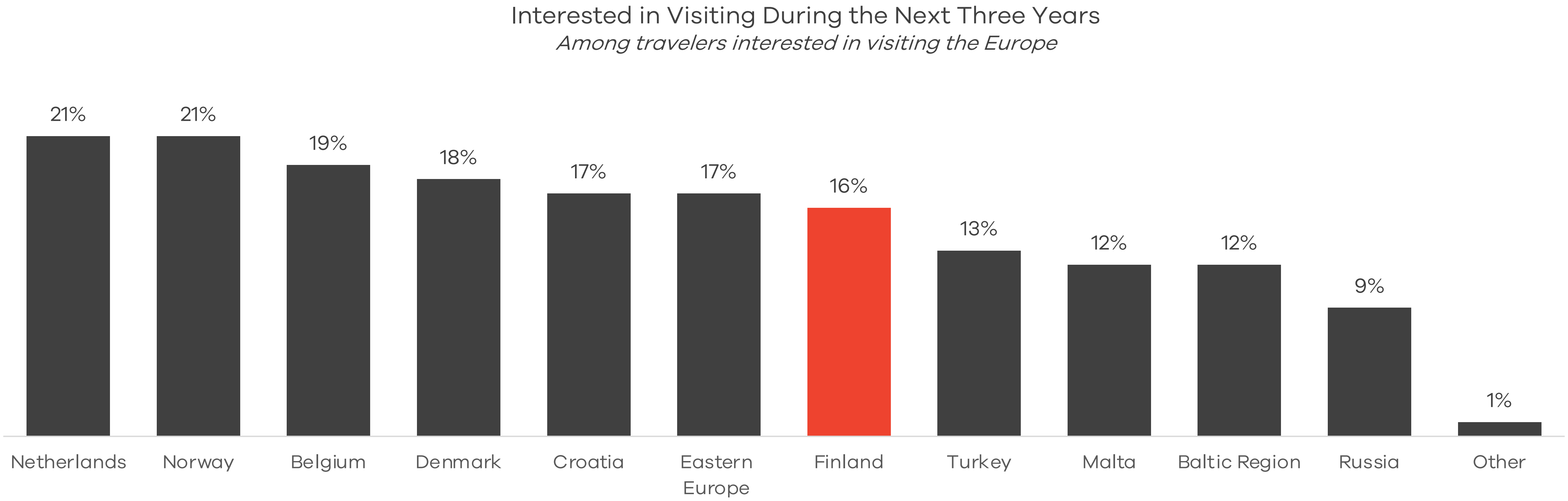
Base: American international travelers (2019: n=2,022; 2022: n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

European Countries Interested in Visiting in the Next Three Years



Base: American international travelers (n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Continued: European Countries Interested in Visiting in the Next Three Years



Base: American international travelers (n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

Interest in visiting all European countries decreased from 2019.

% Interested in Visiting *Among those interested in visiting Europe*		
	2019	**2022**
France	51	42
Italy	56	40
England	50	38
Germany	43	33
Greece	42	33
Spain	47	30
Ireland	37	28
Scotland	34	28
Iceland	31	25
Switzerland	41	24
Sweden	34	24
Portugal	35	23
Norway	33	21

	2019	**2022**
The Netherlands	30	21
Austria	30	21
Belgium	27	19
Denmark	30	18
Croatia	25	17
Eastern Europe	24	17
Finland	32	16
Turkey	17	13
Malta	17	12
Baltic region (Estonia, Latvia, Lithuania)	15	12
Russia	19	9
Other	4	1

- All destinations experienced significant decreases–between 3 and 17-points–indicating that travelers have a more select list of destinations that they'd like to visit. Among the destinations that declined the most are Italy, Spain, Switzerland and Finland.

Base: International travelers interested in visiting Europe (2019: n=2,022; 2022: n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

The Finland Prospect

MMGY Travel Intelligence

Snapshot of the Finland Prospect

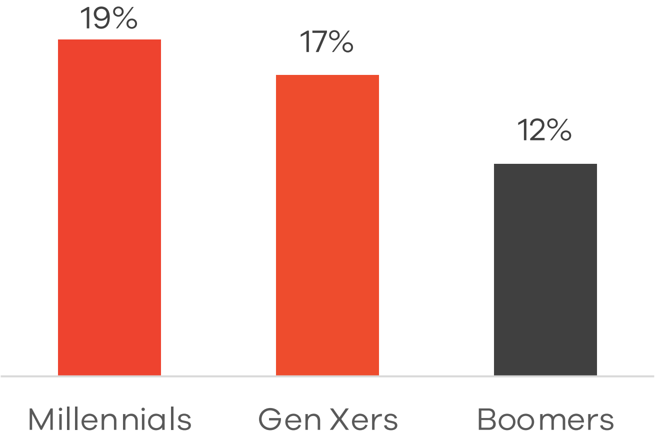
	Prospect	Non-prospect
Average age	44	46
Median income	**$204K**	$159K
Avg. number of international vacations plan to take during the next 12 months	3.8	3.7
Avg. amount plan to spend on international vacations during the next 12 months	**$20,990**	$14,323
% increase from pre-pandemic annual international spend	16%	16%

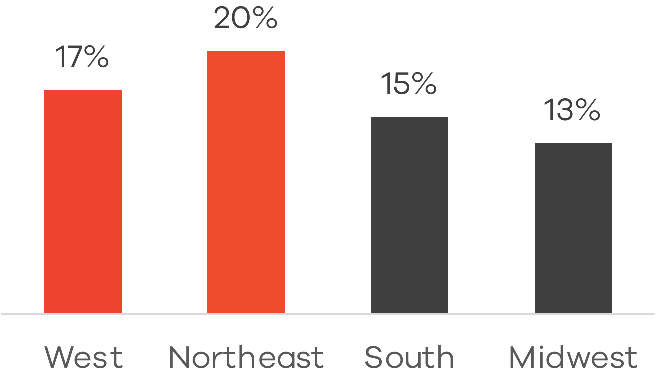
- Finland prospects skew younger and have higher household incomes than non-prospects.
- Compared to non-prospects, Finland prospects expect to take the same number of international vacations but they plan to spend nearly $7,000 more resulting in a higher spend per vacation.

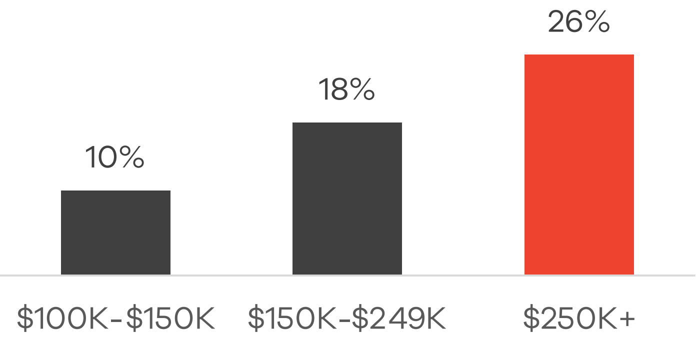
Base: Prospects: n=382; Non-prospects: n=1642

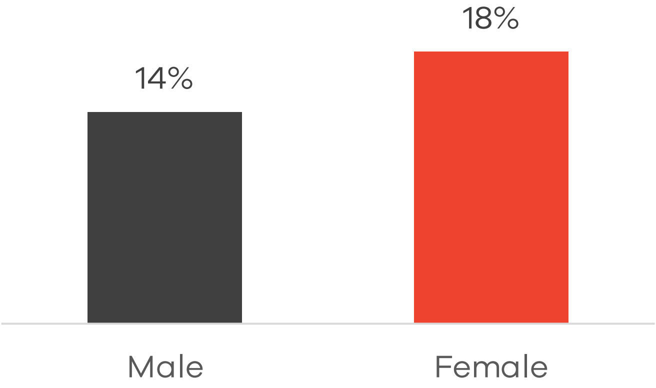
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Interested in Visiting Finland







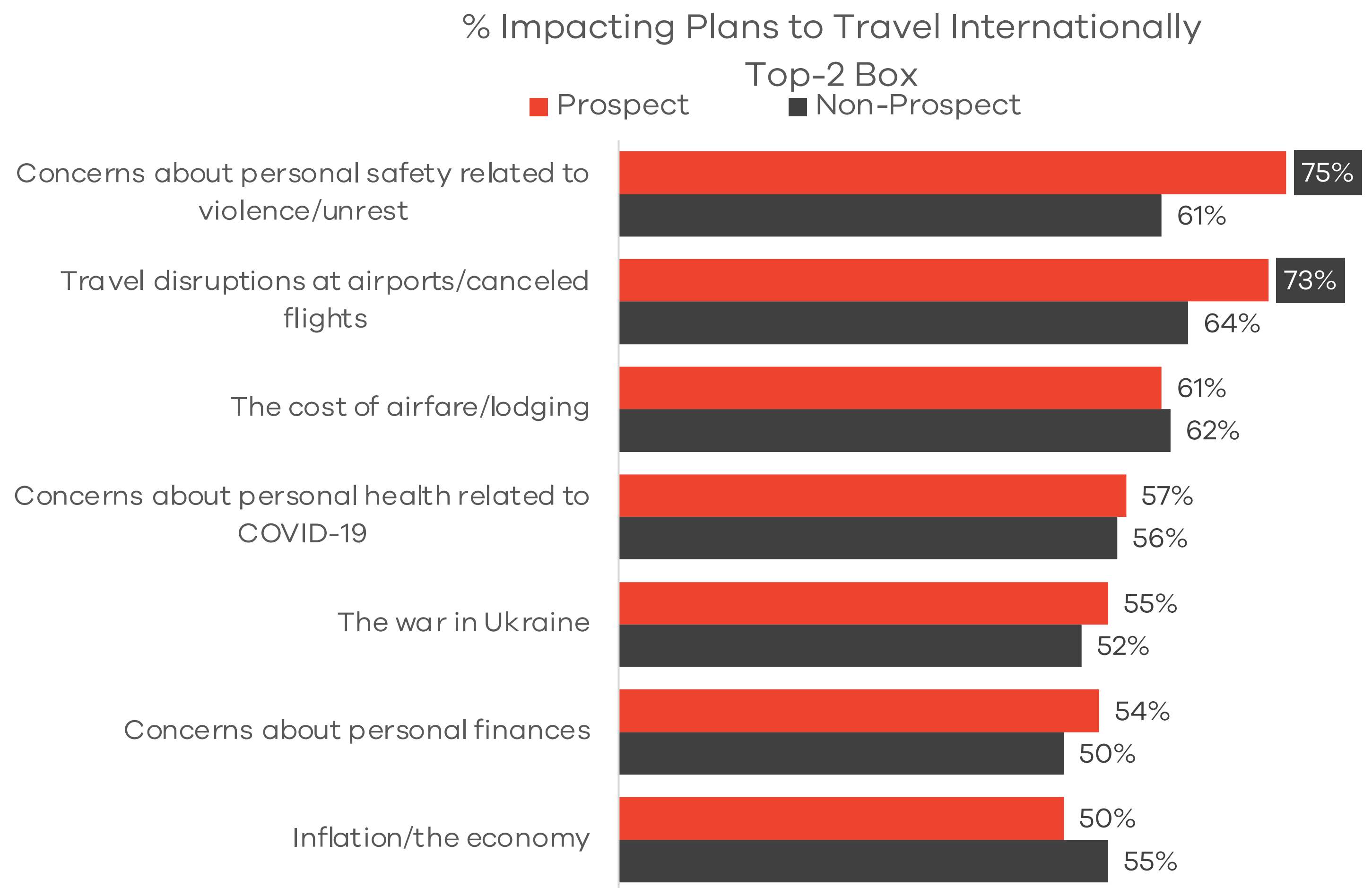


- Interest in visiting Finland decreases with age and increases as household income increases.
- Millennials and Gen Xers, women, those who live in the West or Northeast or travelers with household incomes of $250K or more express the most interest in visiting Finland.

Base: American international travelers (n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Potential Obstacles to Traveling Internationally

Concerns about personal safety and potential travel disruptions are having more of an impact than inflation concerns.



Base: Prospects: n=382; Non-prospects: n=1,642
Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

- Significantly more prospects than non-prospects indicate that concerns about personal safety related to violence/unrest and travel disruptions are impacting their travel plans.

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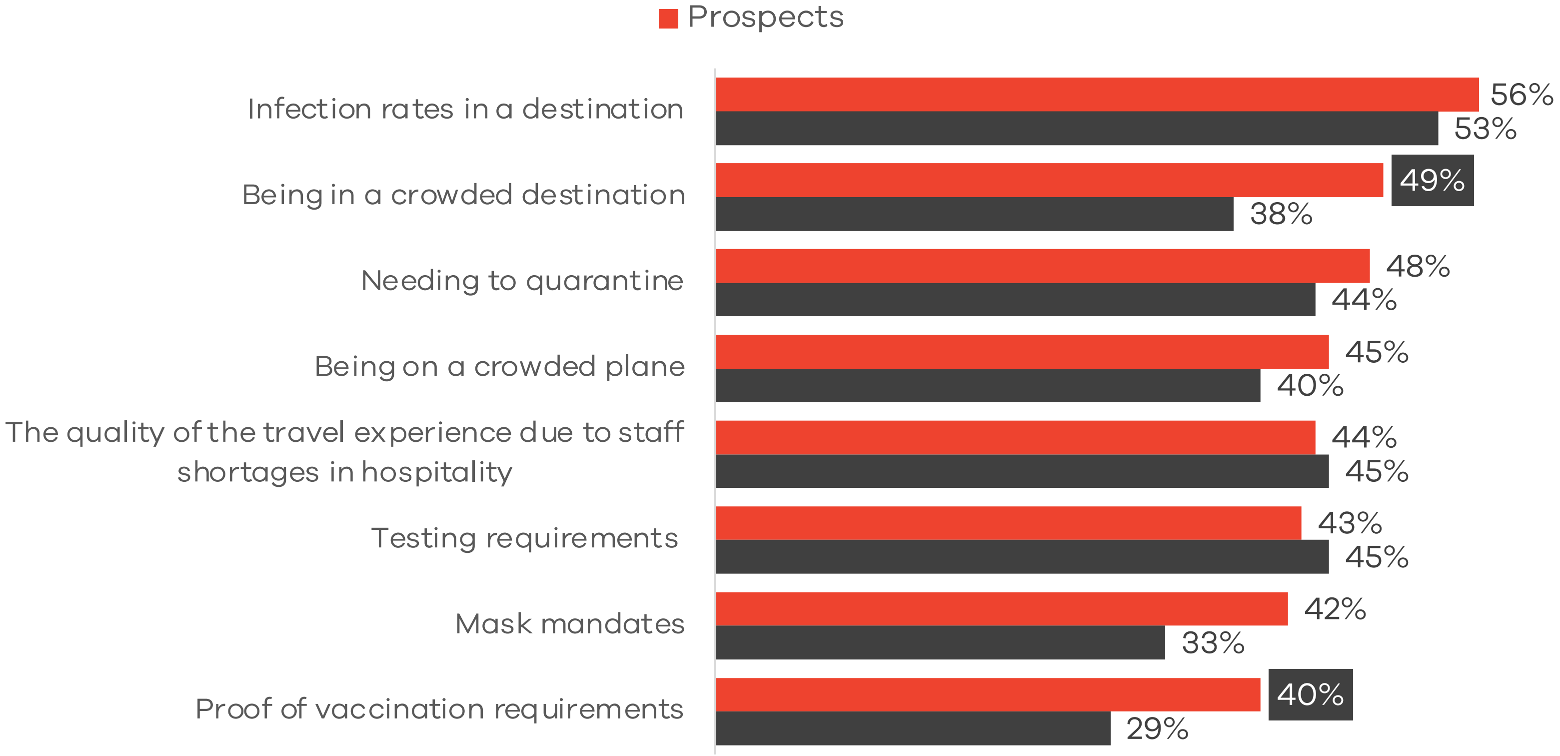
Prospects are more concerned than non-prospects about COVID-19 when making international travel plans.

51% of prospects indicate they are extremely or very concerned about COVID-19 when making international travel plans–significantly more than non-prospects (42%).

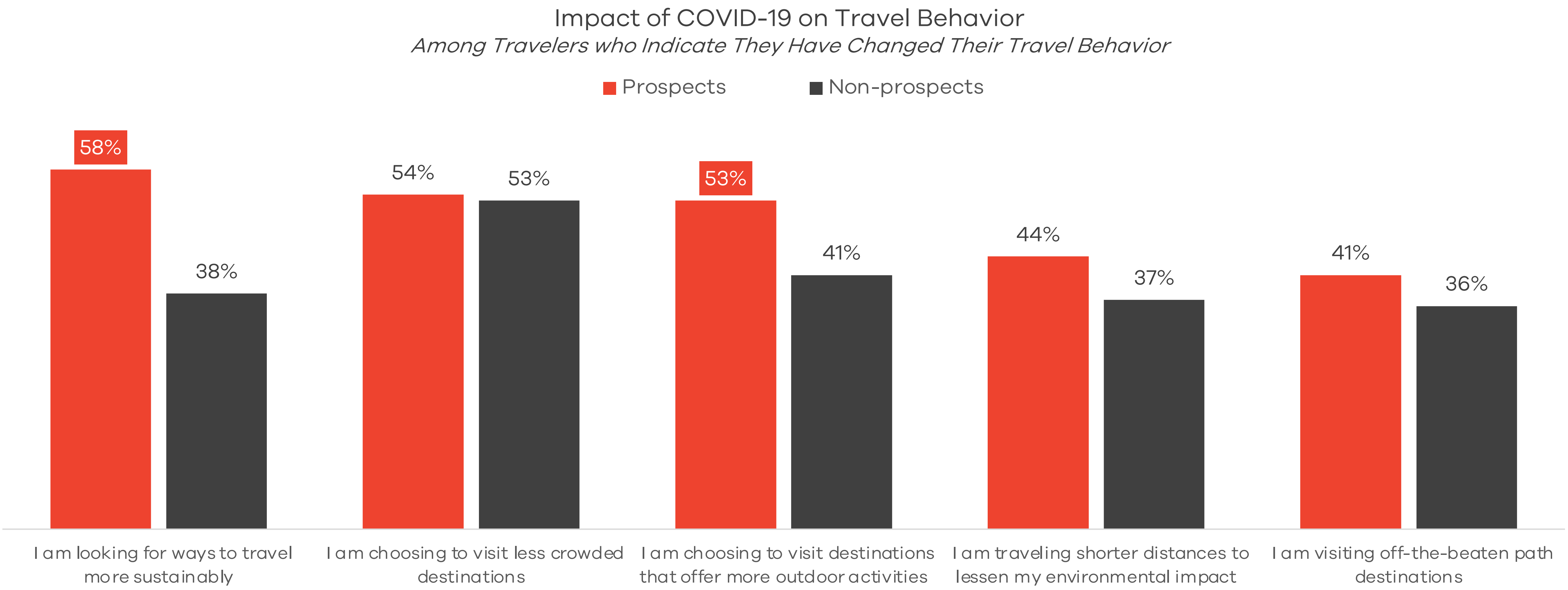
Specific COVID-19 Related Concerns* …



- Finland prospects are significantly more concerned about being in a crowded destination and proof of vaccination requirements than non-prospects.

Base: American international travelers with COVID-19 concerns* (Prospects: n=331; Non-prospects: n=1,352)
Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

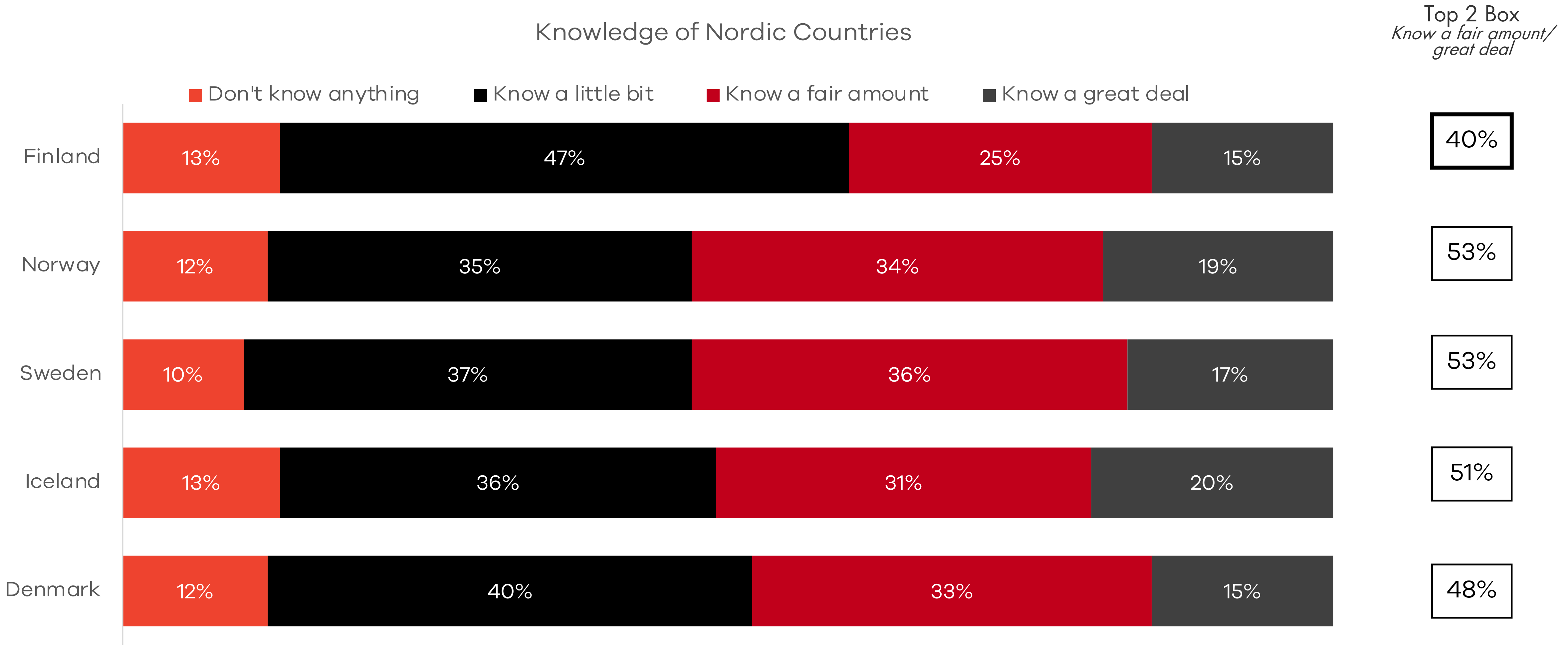
Looking for ways to travel more sustainably is the number one behavior change prospects are making as a result of the pandemic.



Base: Prospects: n=232; Non-prospects: n=1,148
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Finland
Custom Questions

Knowledge of Finland is lower than other Nordic countries.



Base: American international travelers (n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Knowledge of Finland has not changed from 2019.

Know a fair amount/great deal about…	Prospects 2019	Prospects 2022
Norway	58%	64%
Iceland	59%	60%
Denmark	58%	59%
Sweden	61%	56%
Finland	51%	50%

- Knowledge of other Nordic countries is also similar to 2019–the differences that do appear are not statistically significant.

Base: Finland prospects (2022: n=382, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

Experiencing nature is the top motivation for vacationing in Finland, even more so than in 2019.

Motivations For Vacationing in Finland	Prospects 2019	Prospects 2022
Experiencing nature	64%	**72%** ▲
Traveling to an undiscovered destination	56%	59%
Having an active vacation	38%	**54%** ▲
Experiencing the local lifestyle (everyday life of local people)	**60%**	49% ▼
Experiencing cities	53%	48%
Enjoying a high-end travel experience	**32%**	18% ▼
Other	2%	2%

- Throughout the results of Finland's custom questions, it is apparent that Finland prospects most associate Finland with its natural assets and it is also the biggest draw.

Base: Finland prospects (2022: n=371, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

The top associations with Finland are natural wonders and the safety of the destination.

ASSOCIATIONS WITH FINLAND	STRONGLY ASSOCIATE	SOMEWHAT ASSOCIATE	DON'T ASSOCIATE	NOT SURE
Experiencing natural wonders (the northern lights, midnight sun)	69%	26%	3%	1%
Safe travel destination	61%	33%	4%	3%
Variety of winter/snow activities	56%	33%	4%	6%
Family-friendly destination	53%	28%	9%	10%
Luxury accommodations	52%	34%	8%	6%
Undiscovered destination/off-the-beaten-path	50%	36%	10%	3%
Extra-ordinary accommodation options	48%	31%	**12%**	9%
Sauna experiences	47%	36%	6%	10%
Culinary experiences and local delicacies	46%	35%	**13%**	6%
Variety of summer/outdoor activities	42%	38%	10%	9%
Interesting architecture and design	40%	44%	10%	6%
A sustainable travel destination	40%	38%	10%	12%
Interesting local festivals and other special events	40%	35%	**14%**	10%
Less crowded than other destinations	36%	48%	3%	14%
Affordable accommodations	36%	40%	**15%**	9%

Base: Finland prospects (n=371)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

- There is opportunity to educate prospects on affordable accommodation options, interesting local festivals and culinary experiences that Finland offers as these are least associated with Finland.

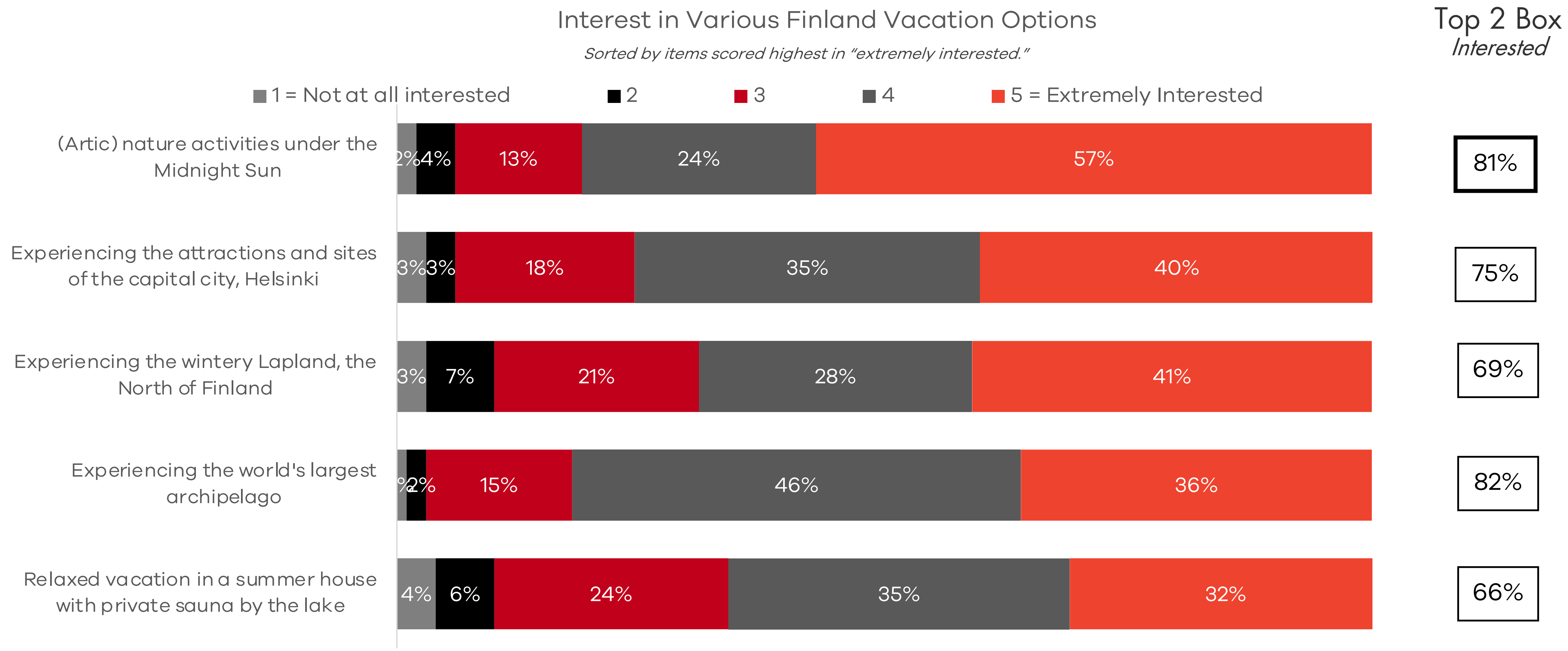
Compared to 2019, more prospects associate Finland with luxurious accommodations and fewer associate it with interesting festivals and events.

STRONGLY/SOMEWHAT ASSOCIATE WITH FINLAND	2019 Prospects	2022 Prospects
Experiencing natural wonders (the northern lights, midnight sun)	94%	95%
Safe travel destination	n/a	94%
Variety of winter/snow activities	91%	90%
Undiscovered destination/off-the-beaten-path	87%	87%
Luxury accommodations	76%	**86%** ▲
Interesting architecture and design	88%	84%
Less crowded than other destinations	88%	84%
Sauna experiences	82%	84%
Family-friendly destination	n/a	81%
Variety of summer/outdoor activities	79%	81%
Culinary experiences and local delicacies	80%	81%
Extra-ordinary accommodation options (glass cabins etc.)	83%	79%
A sustainable travel destination	n/a	78%
Affordable accommodations	78%	76%
Interesting local festivals and other special events	**85%**	76% ▼

Data in bold indicates a significant difference.

Base: Finland prospects 2022=371, 2019=634
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Over half of prospects are *extremely* interested in nature activities under the Midnight Sun.



Base: Finland prospects (n=371)
Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

Prospects are most interested in nature activities.

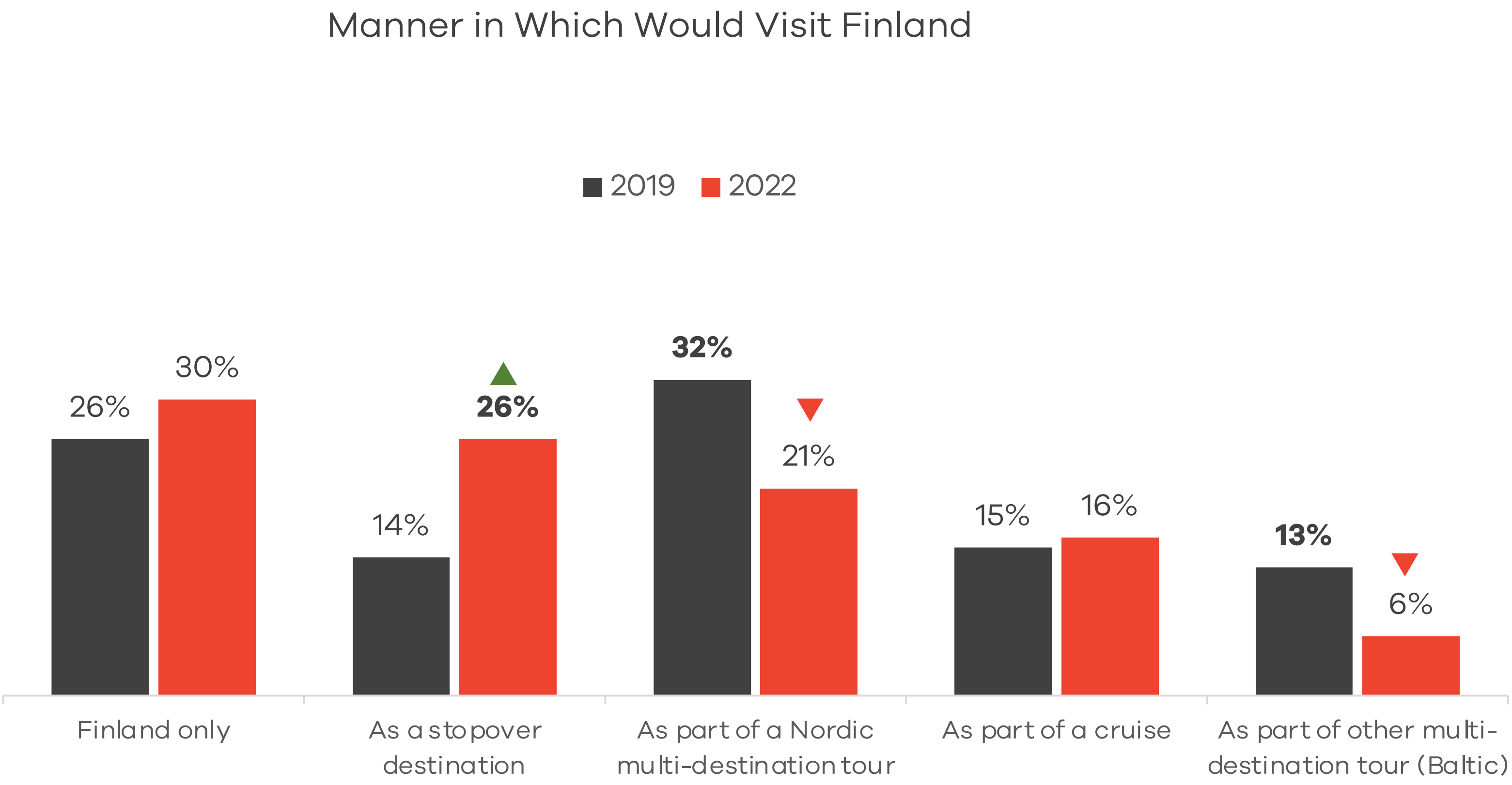
Interested in Various Finland Vacation Options ***Top-Two Box***	**2019 Prospects**	**2022 Prospects**
Experiencing the worlds largest archipelago	84%	82%
(Artic) nature activities under the Midnight Sun	n/a	81%
Experiencing the attractions and sites of the capital city Helsinki	**92%**	75% ▼
Experiencing the wintery Lapland, the North of Finland	**80%**	69% ▼
Vacationing in a summer house with private sauna by the lake	70%	66%

Data in bold indicates a significant difference.

- Finland prospects are less interested in the city and experiencing the wintery Lapland compared to 2019.
- The decline in interest in the city is most likely a result of changing interests due to the pandemic.

Base: Finland prospects (2022: n=371, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Similar to 2019, the preferred way to visit Finland would be as a standalone destination.



- However, more prospects than in 2019 indicate they would visit Finland as a stopover destination while fewer would visit as part of multi-destination tours.

Base: Finland prospects (n=371)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Most Finland prospects would prefer to plan and making the bookings themselves, but there is greater interest in using a tour operator than in 2019.

Method of arranging a vacation to Finland	2019 Prospects	2022 Prospects
Plan and make bookings myself	**44%**	35% ▼
Use a tour operator to arrange a tailor-made trip according to my (or my family's/company's) wishes	14%	**28%** ▲
Book a ready-made package from a tour operator with a fixed itinerary	15%	**23%** ▲
Plan and book some parts of the trip myself and use a tour operator for other parts	**22%**	14% ▼

- In general, we are seeing an increase in the intent to use a third-party to help plan travel. The increase is likely due in part to the pandemic and travelers having to navigate an unpredictable travel environment.

Base: Finland prospects (2022: n=371, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Those interested in Finland are hampered by expensive flights and the desire to visit other destinations first.

Potential Barriers to traveling to Finland	Prospects 2019	Prospects 2022
Flight is too expensive	27%	**37%** ▲
Would rather visit other destinations first	30%	**37%** ▲
Just never considered it for a vacation	16%	**36%** ▲
Safety concerns	17%	**31%** ▲
Destination is too expensive	28%	28%
Don't know enough about it	17%	22%
Flight is too long	15%	20%
Language barrier	15%	17%
It's not appealing to me	6%	5%
Nothing interesting to do	0%	1%
Other	10%	4%

- Finland prospects feel a greater weight of the barriers to travel to Finland than in 2019.

Base: Finland prospects (2022: n=371, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Sustainability in Travel

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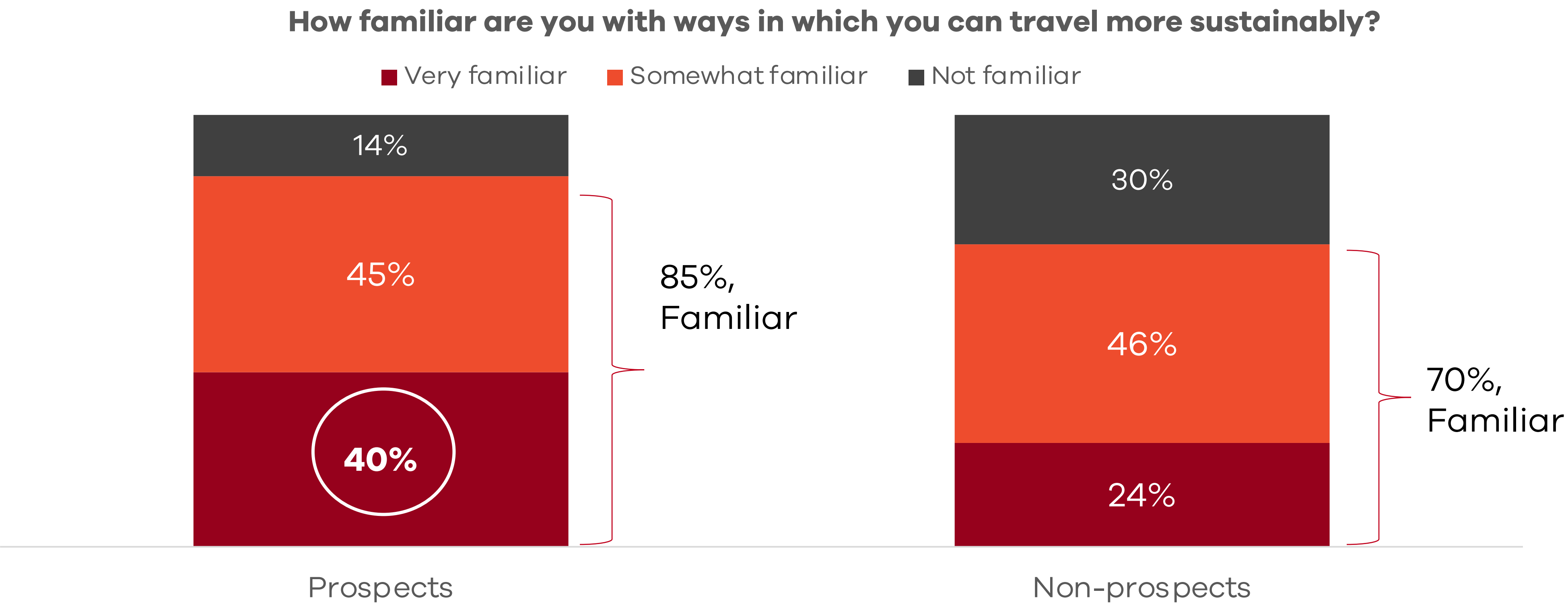
The Finland prospect is a sustainable traveler.

- **Sustainability efforts impact their travel decision-making.**
  - 50% of prospects indicate that a travel service provider's focus on sustainability and environmental considerations impact their travel decision-making, compared to 43% of non-prospects.
  - 76% of prospects indicate that they visit lesser-known destinations or visit in the off-season to avoid contributing to tourism overcrowding compared to 59% of non-prospects.
  - 55% indication that a destination's reputation for sustainable tourism influences their choice of vacation destination, compared to 47% of non-prospects.
- **They are willing to take action to support the cause.**
  - 80% are willing to pay a higher rate to support providers who demonstrate environmental responsibility, compared to 78% of non-prospects.
  - 59% agree that they would be willing to pay an extra $100 for a flight to help reduce their carbon footprint, compared to 51% of non-prospects.
- **They are knowledgeable.**
  - 86% agree that they are familiar with ways to travel more sustainably, compared to 76% of non-prospects.

Base: American international travelers (n=2,024)
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

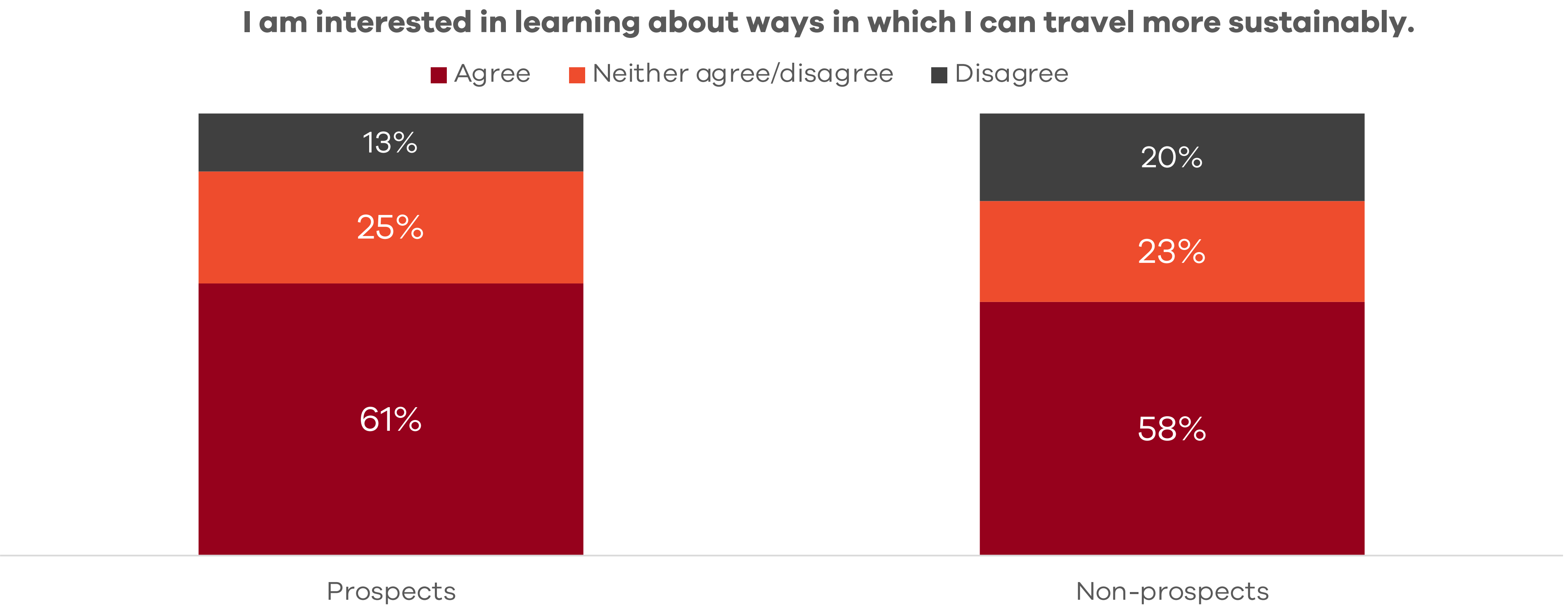
- There is opportunity to educate prospects on sustainable travel. Even though Finland prospects are knowledgeable on the topic, they are interested in learning how they can travel even more sustainably.
- Prioritizing sustainability and continuing to attract a sustainable traveler not only benefits the destination's natural assets, but residents are more likely to embrace tourism if the visitors demonstrate some of these values.

Finland prospects are knowledgeable about ways to travel sustainably…



Base: Prospects: n=382; Non-prospects: n=1642
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

... but still have an appetite for learning more.

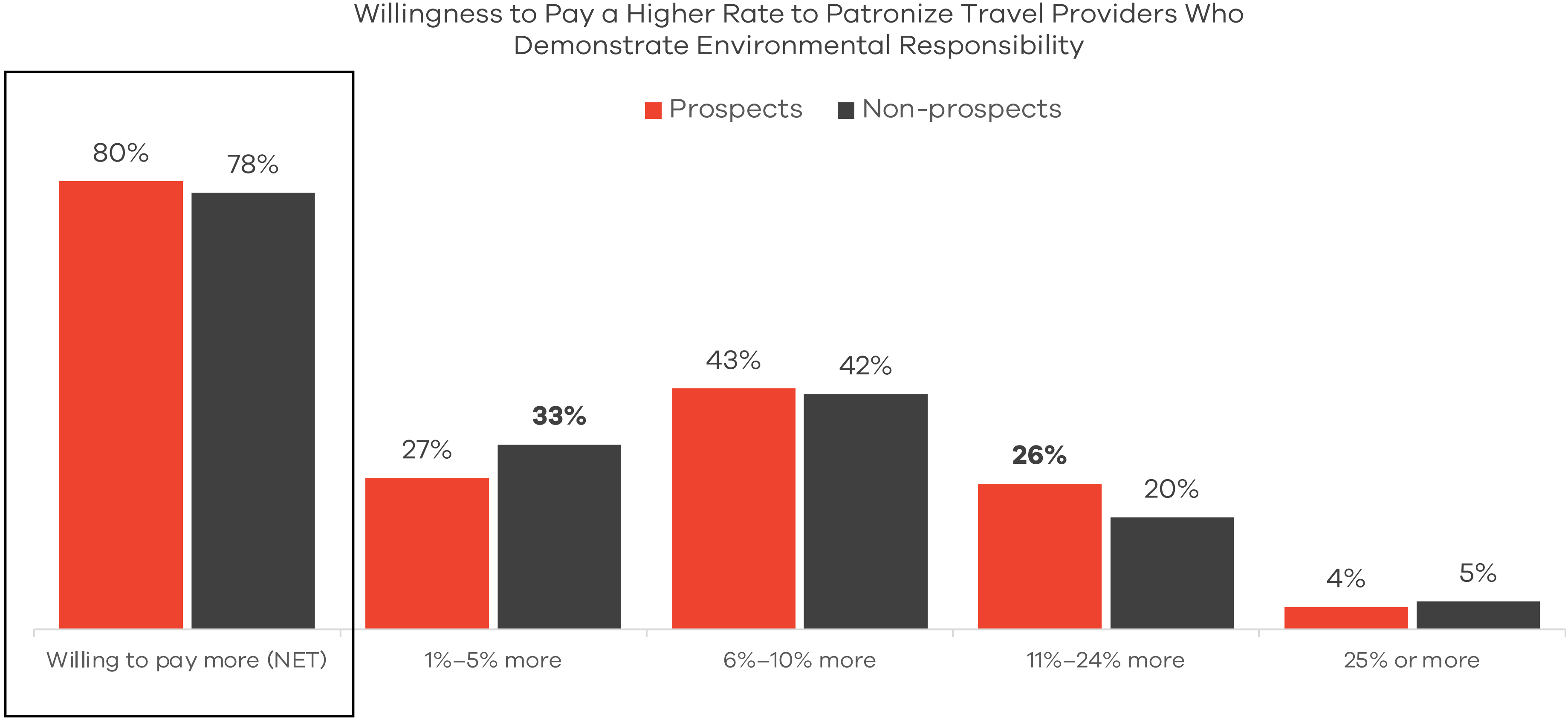


Base: Prospects: n=382; Non-prospects: n=1642
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

76%

of prospects agree that they visit lesser-known destinations or visit in the off-season to avoid contributing to tourism overcrowding, compared to 59% of non-prospects.

Among prospects who say they are willing to pay more, the majority (70%) are willing to pay a maximum of 10% more.



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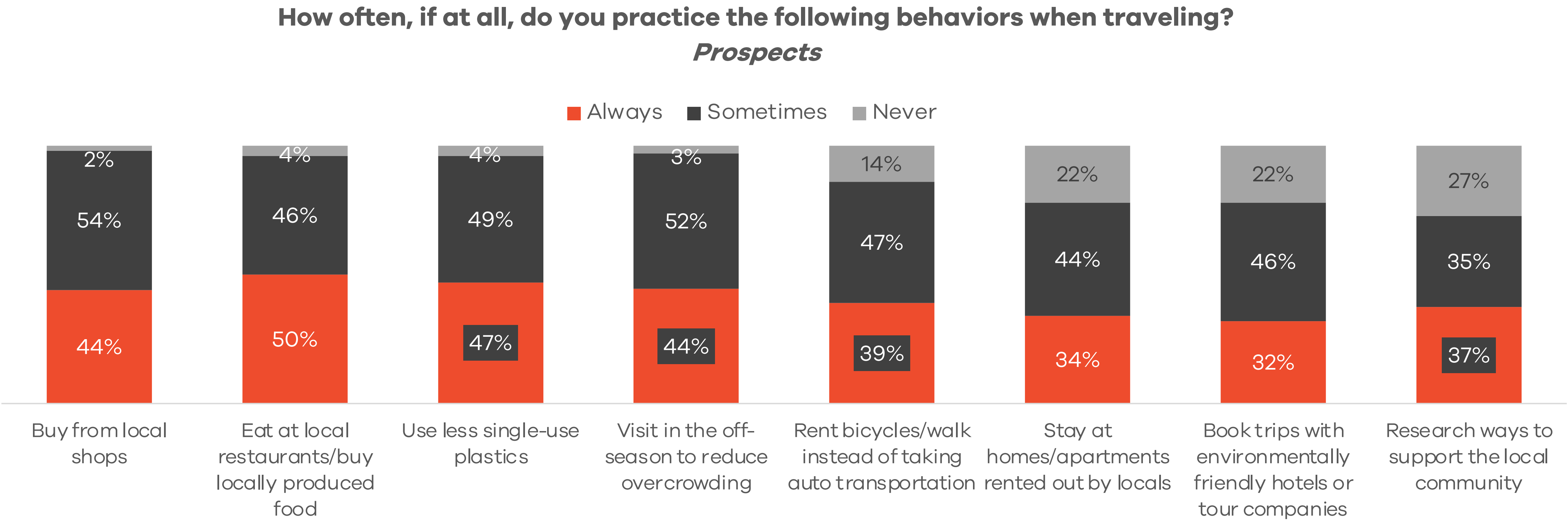
Sustainable Behaviors While Traveling



Statistically significant differences from those not interested in Finland is shaded black.

Base: Finland Prospects: n=382
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Travel Advisors

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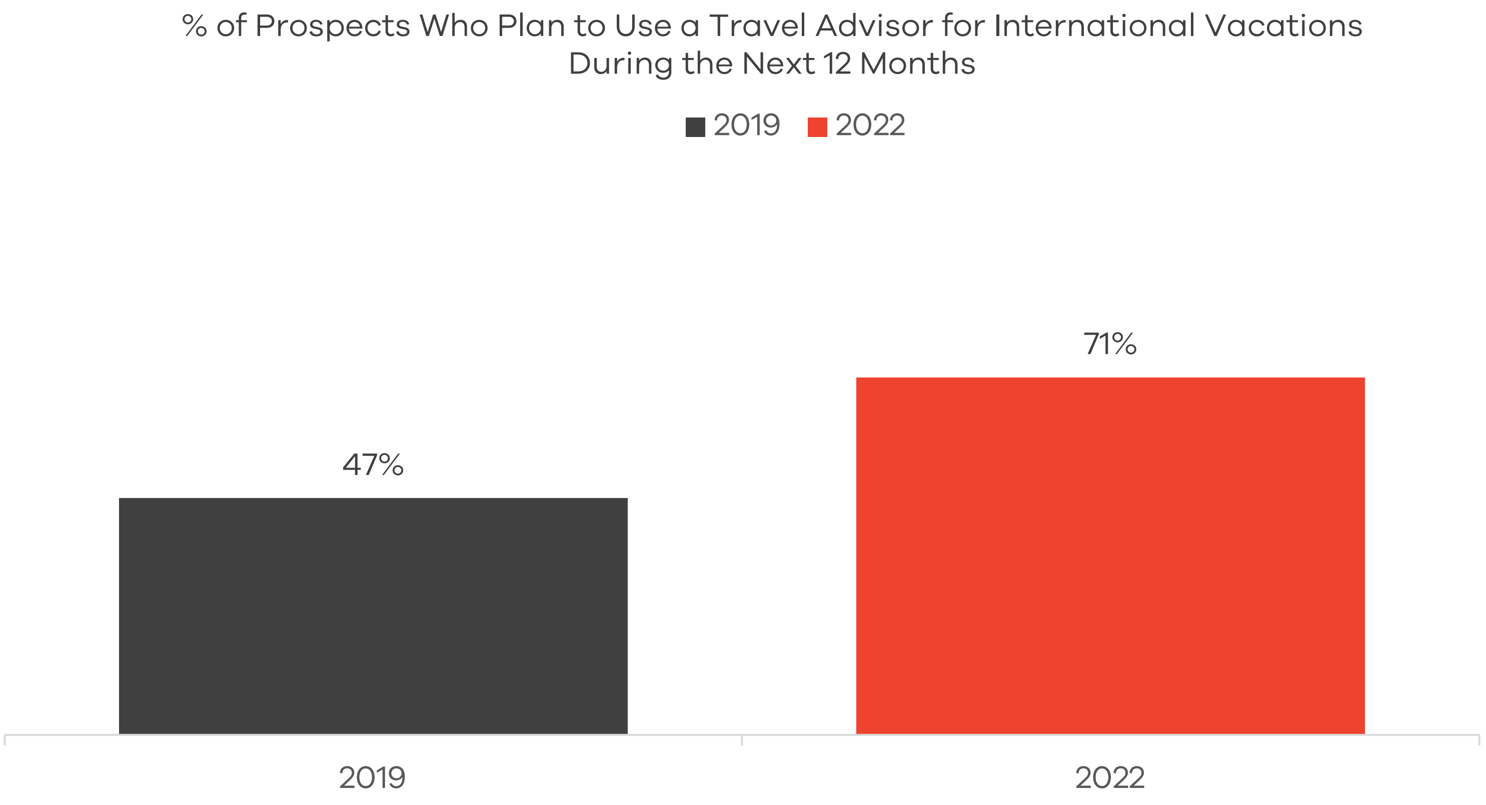
Travel advisor usage among prospects is expected to increase significantly.



- As mentioned previously, this increase is likely due to travelers having to deal with unpredictability and wanting an extra layer of confidence/security in their travel decisions.
- Consider expanding travel advisor relationships and supplying them with the tools necessary to cater to prospects. Specifically, prospects' top reason for using a travel advisor would be to get access to activities/places that they could not get to on their own. (shown on next page).

Base: Finland prospects (2022:n=382, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Prospects are most likely to use a travel advisor to get access to activities/places they cannot get on their own and the ability to make changes/cancellations.

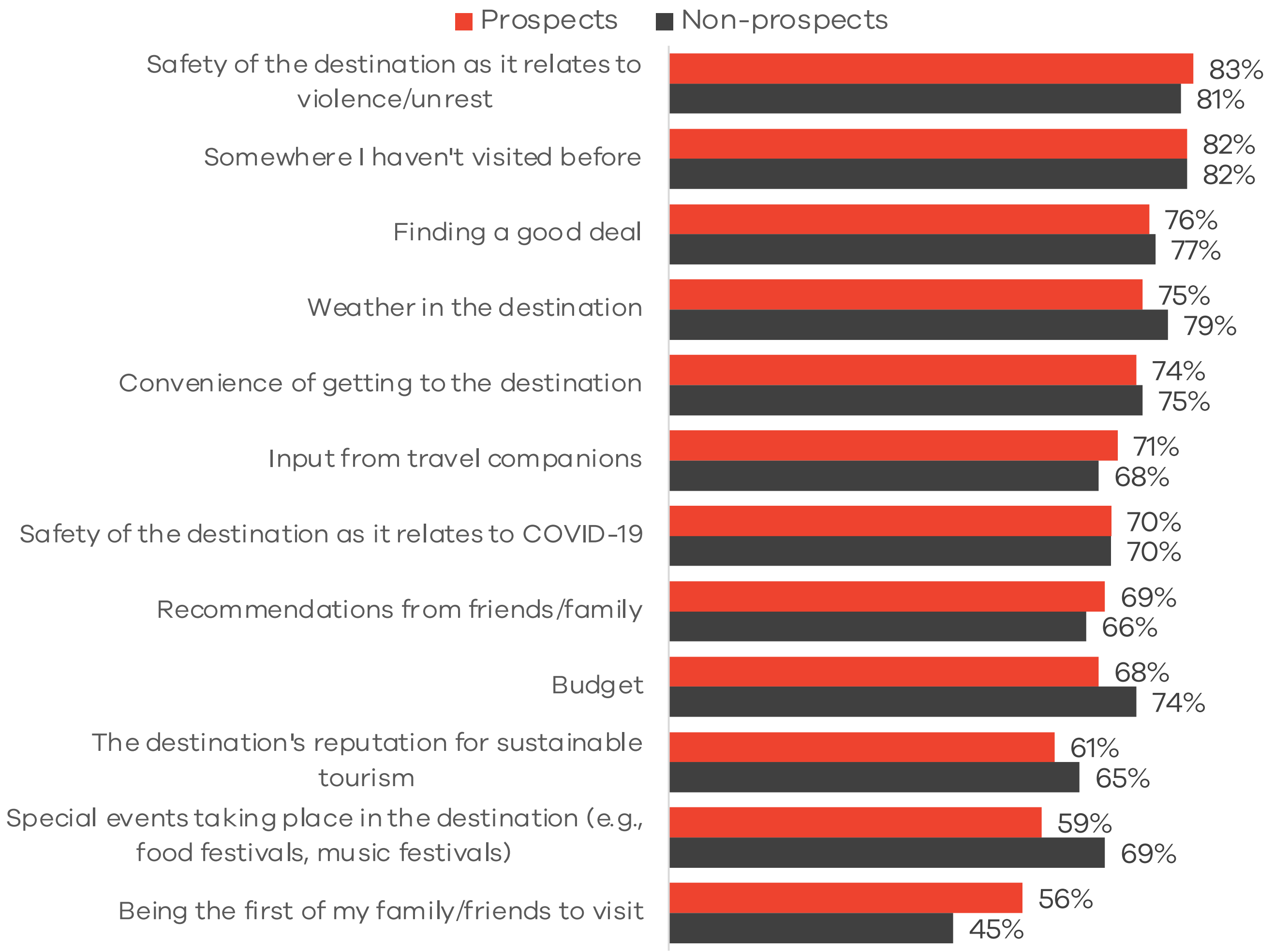
Situations in Which Would Consider Using a Travel Advisor	Prospects	Non-prospects
To get access to activities/places I cannot get to on my own	35%	29%
For the ability to make changes, cancellations, etc.	32%	28%
Complex itineraries	30%	33%
Organizing a group vacation	29%	25%
Planning a multi-day tour	29%	23%
To confirm bookings	27%	29%
Planning special occasion vacations	26%	20%
Planning a day tour	26%	19%
Expensive vacations	25%	25%
Planning multi-city vacations	24%	30%
For education on the latest intel on a destination	23%	21%
Special interest trips (e.g., photography, birdwatching, sports)	23%	20%
Perceived language barriers	23%	20%
None of the above	8%	8%

Base: Prospects: n=382; Non-prospects: n=1642

Source: MMGY Global's 2022 *Portrait of American International Travelers*™

International Travel Planning

Influential When Selecting a Destination



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- The safety of the destination as it relates to violence/unrest, visiting somewhere new, safety, and finding a good deal are the top traits that influence a prospect's choice of vacation destination.

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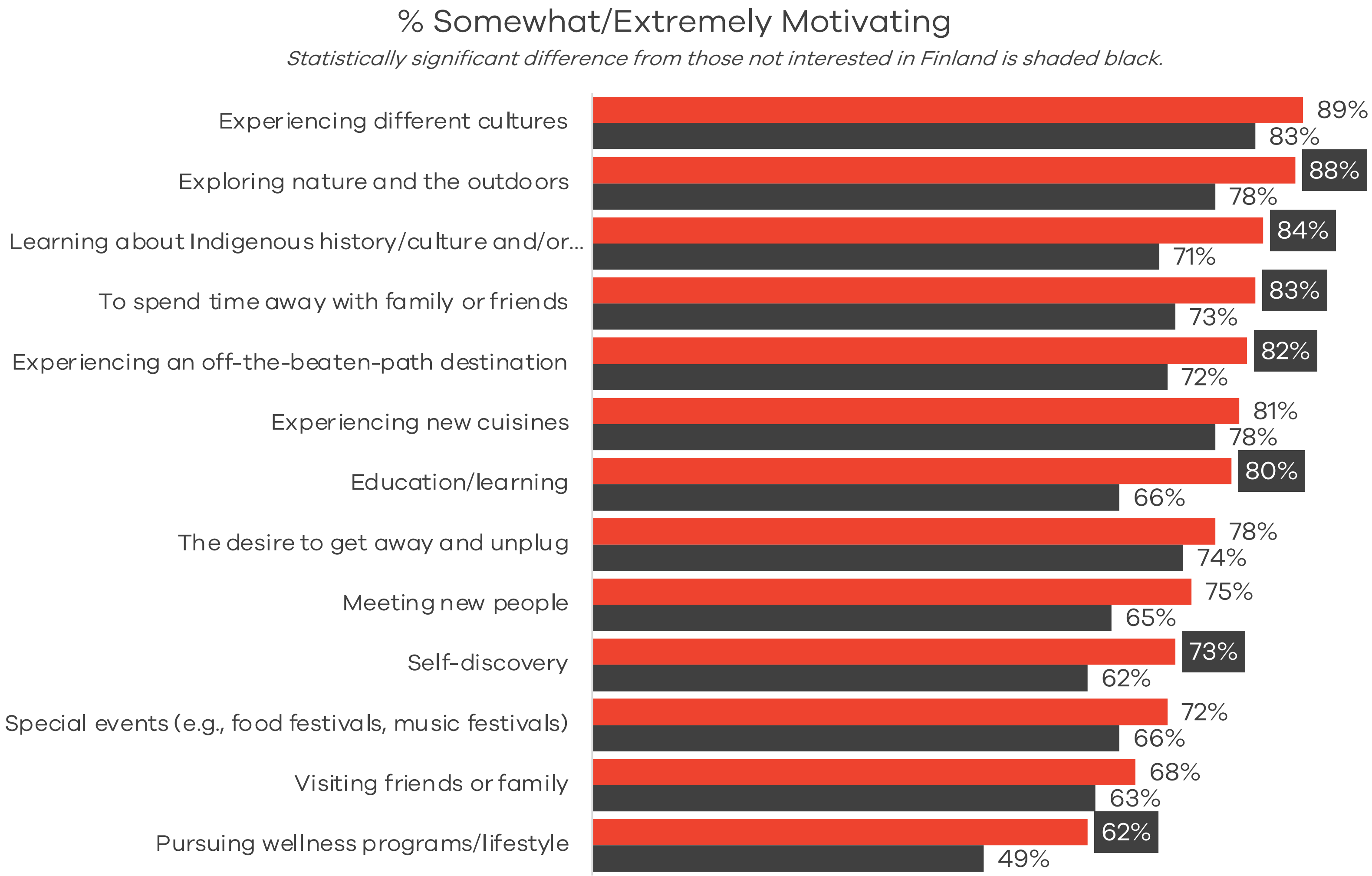
Prospects have a more diverse set of travel motivators than non-prospects.



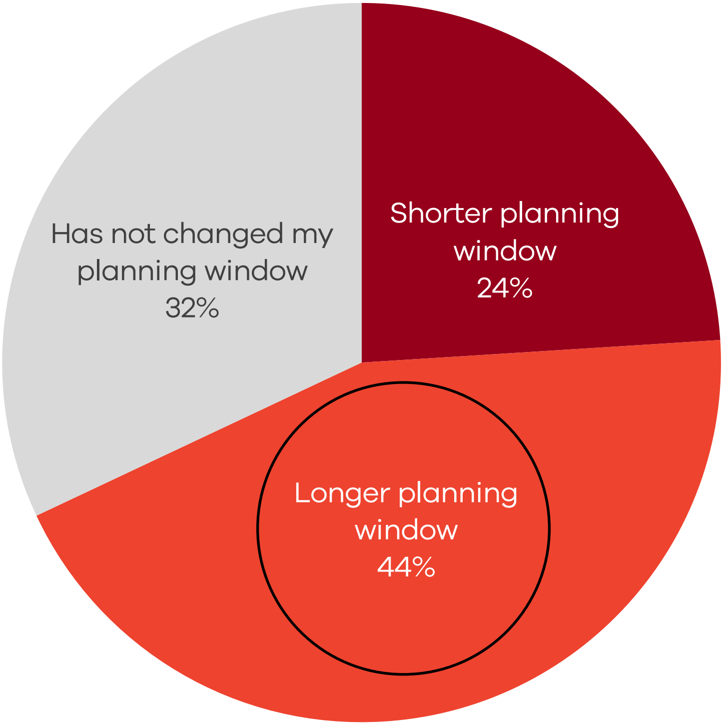
Base: Prospects: n=382; Non-prospects: n=1642

Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

- Finland prospects are much more likely to be motivated to travel internationally to explore nature and the outdoors, learn about Indigenous history/culture, spend time away with family or friends, experience an off-the-beaten path destination, education/learning and pursuing wellness programs/lifestyle.

The planning window for international travel has lengthened.

How has the pandemic changed the lead time of planning an international vacation?
(Finland Prospects)



- Even though travelers expressed the planning window has lengthened, a large portion(65%) are still planning fewer than six months in advance.

Planning International Vacations	Prospects 2019	Prospects 2022
<3 months in advance	22%	21%
3–6 months in advance	44%	44%
6–12 months in advance	29%	27%
12+ months in advance	5%	8%

Base: Finland prospects 2022=382, 2019=634
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Expedia is the top website used for international travel information.

Specific Websites Used to Obtain International Travel Information	Prospects	Non-prospects
Expedia	39%	34%
Google Travel	**36%**	23%
YouTube	34%	33%
Tripadvisor	34%	38%
Booking.com	**31%**	23%
Kayak	**31%**	18%
Specific airline brand website	**29%**	23%
Hotels.com	**27%**	21%
Travelocity	**26%**	20%
Specific hotel brand website	26%	24%
Specific vacation destination website	26%	29%
Trivago	23%	20%
Orbitz	**21%**	15%
Travel blogs	**20%**	14%
Priceline	19%	19%
None of the above	2%	2%

- Finland prospects are much more likely to go to Expedia, Google Travel and YouTube for international travel information.

Base: Prospects: n=382; Non-prospects: n=1642
Source: MMGY Global's 2022 *Portrait of American International Travelers™*

Social media is playing an increasing role in travel decision-making.

	Prospects 2019	Prospects 2022
Follow a destination on social media	35%	63% ▲
Has selected a vacation destination at least partially on information, photos or videos viewed on social media	45%	68% ▲
Social media influencers have a great deal/somewhat of an influence on travel decisions	NA	60%

Content Considered to Be The Most Inspirational	Prospects 2022
Beautiful pictures taken by professional photographers in the destination	64%
Authentic images of the destination taken by other travelers	55%
Special offers/promotions from travel service providers in the destination	53%
Sustainability initiatives	45%
Insider information/access from the destination	43%
Stories from/about fellow travelers	37%
Contests/sweepstakes	37%

- More than two-thirds of prospects indicate that they are selecting vacation destinations at least partially on information viewed on social media.
- 6 in 10 report that social media influencers have an impact on their travel decision-making.
- Utilizing social media influencers may be an effective way to promote Finland as a vacation destination.

Base: Finland prospects (2022:n=382, 2019: n=634)
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

8 in 10 Finland prospects indicate they use social media for travel planning, and YouTube is used most often for this purpose.

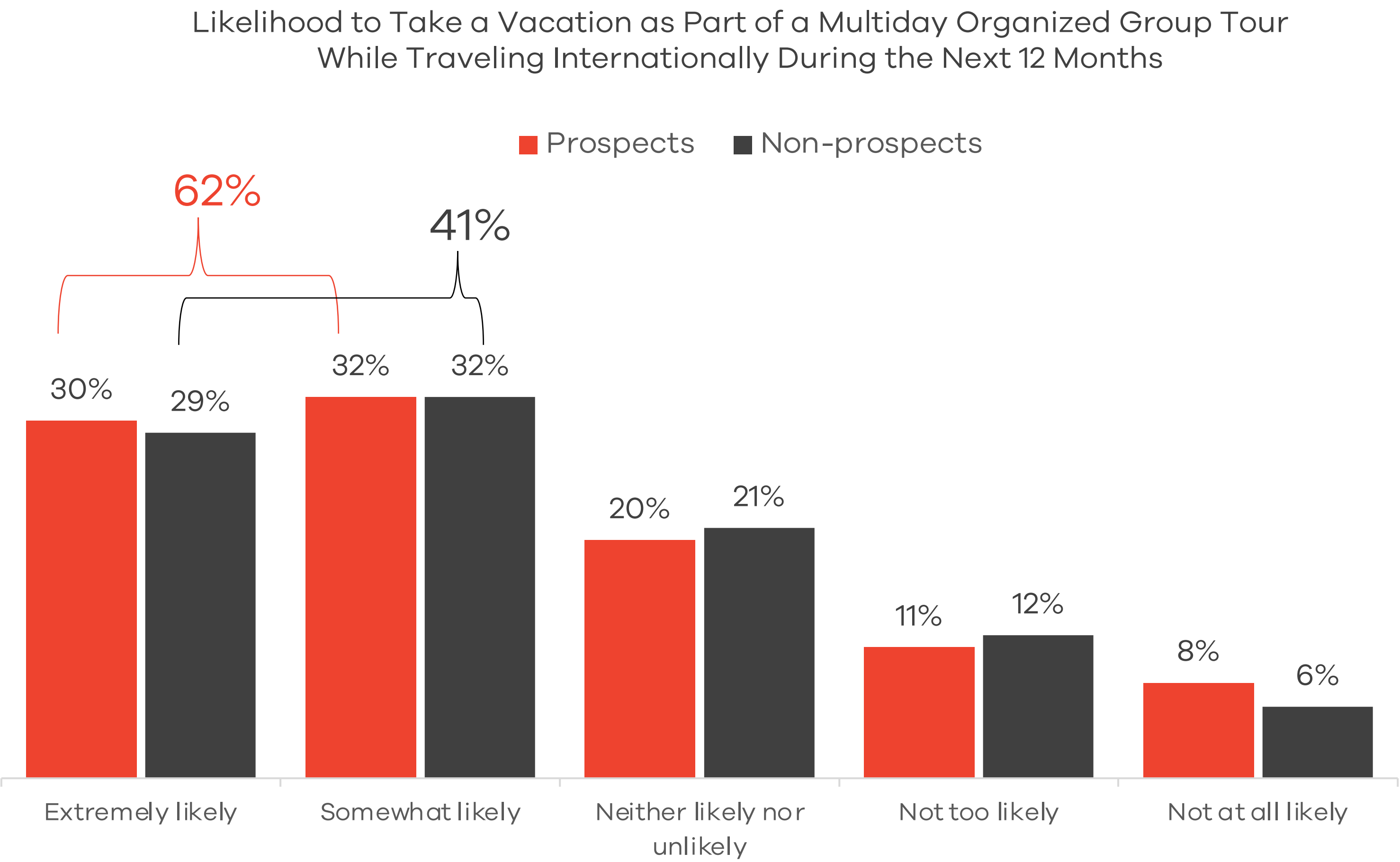
Social Media Platforms Used when Planning Travel	Prospects	Non-Prospects
YouTube	41%	32%
TikTok	25%	17%
Instagram	24%	28%
Facebook/META	24%	25%
Snapchat	18%	12%
Twitter	16%	15%
Twitch	15%	9%
LinkedIn	13%	9%
Pinterest	13%	16%
Telegram	10%	9%
Tumblr	8%	4%
I don't use social media for planning travel	20%	27%

Base: Those that have a social media profile (Prospects: n=375; Non-prospects: n=1,614)

Source: MMGY Global's 2022 *Portrait of American International Travelers*TM

Organized Group Tours

Prospects are much more likely than non-prospects to take a multiday group tour.



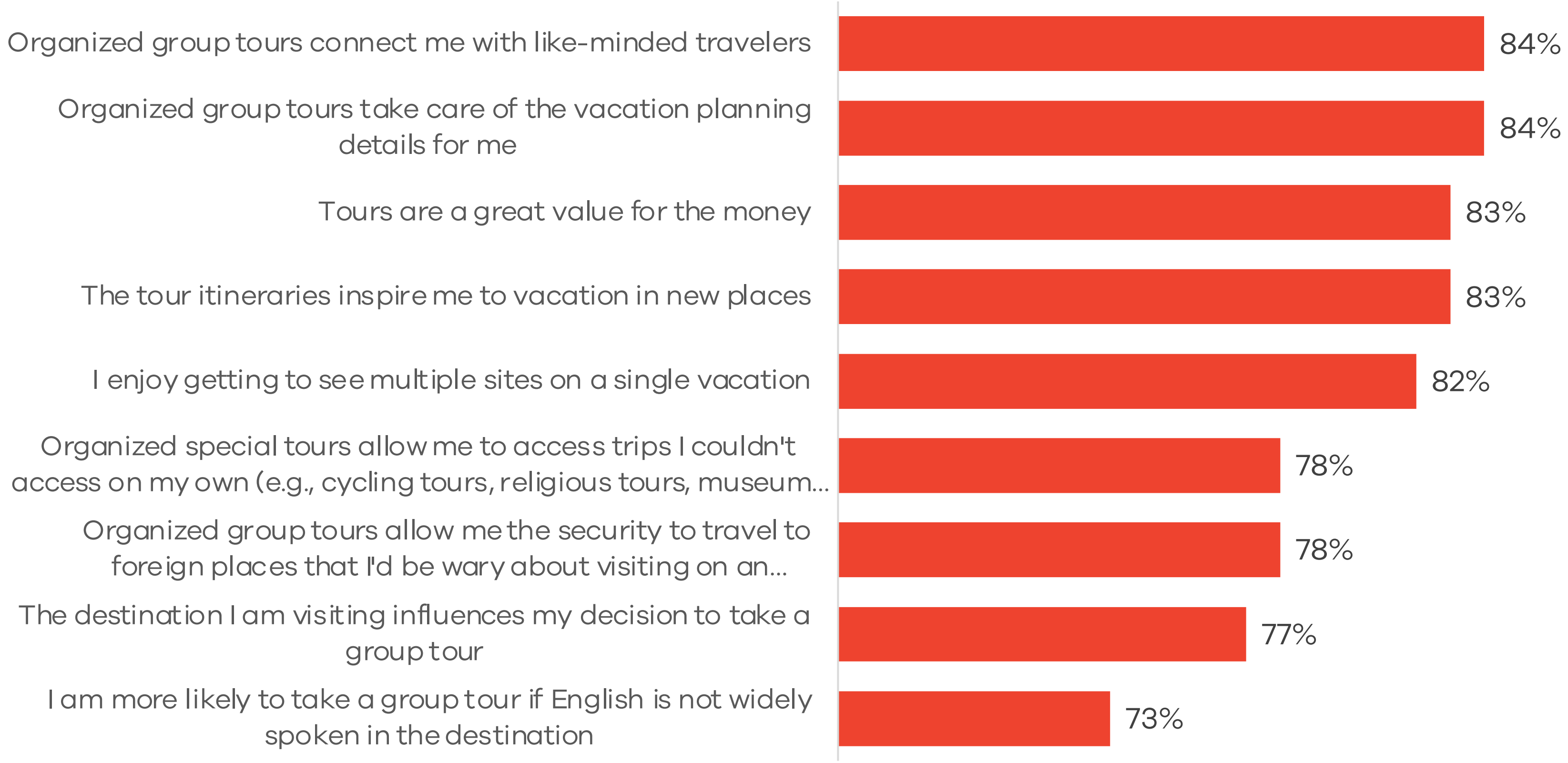
Base: Prospects: n=382; Non-prospects: n=1,642

Source: MMGY Global's 2022 *Portrait of American International Travelers*™

- 62% of prospects indicate they are extremely or somewhat likely to take a multiday organized group tour during the next 12 months, compared to 41% of non-prospects.

Top reasons for traveling with a tour company are to connect with like-minded travelers and that they take care of the details.

Reasons for Considering Traveling with a Tour Company - Prospects % Agree (Top-2 Box)



Base: American international travelers who have taken or are likely to take a group tour (Prospects: n=233)
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Respondent Demographics

50 YEARS FORWARD
INTEGRITY IN TOURISM USTOA
United States Tour Operators Association
MMGY Travel Intelligence

Respondent Demographics

	Prospects	Non-prospects
Male	44%	52%
Female	56%	47%
Other		
Lesbian, Gay, Bisexual, and/or Transgender (LGBTQ+)	12%	16%
Millennials	49%	44%
Gen Xers	32%	30%
Boomers	19%	26%
Household income (median)	$203,600	$158,600
White	69%	71%
Hispanic	12%	13%
African American/Black	9%	13%
Asian	21%	12%
Native American	1%	4%
Pacific Islander	3%	2%

Base: Prospects: n=382; Non-prospects: n=1,642

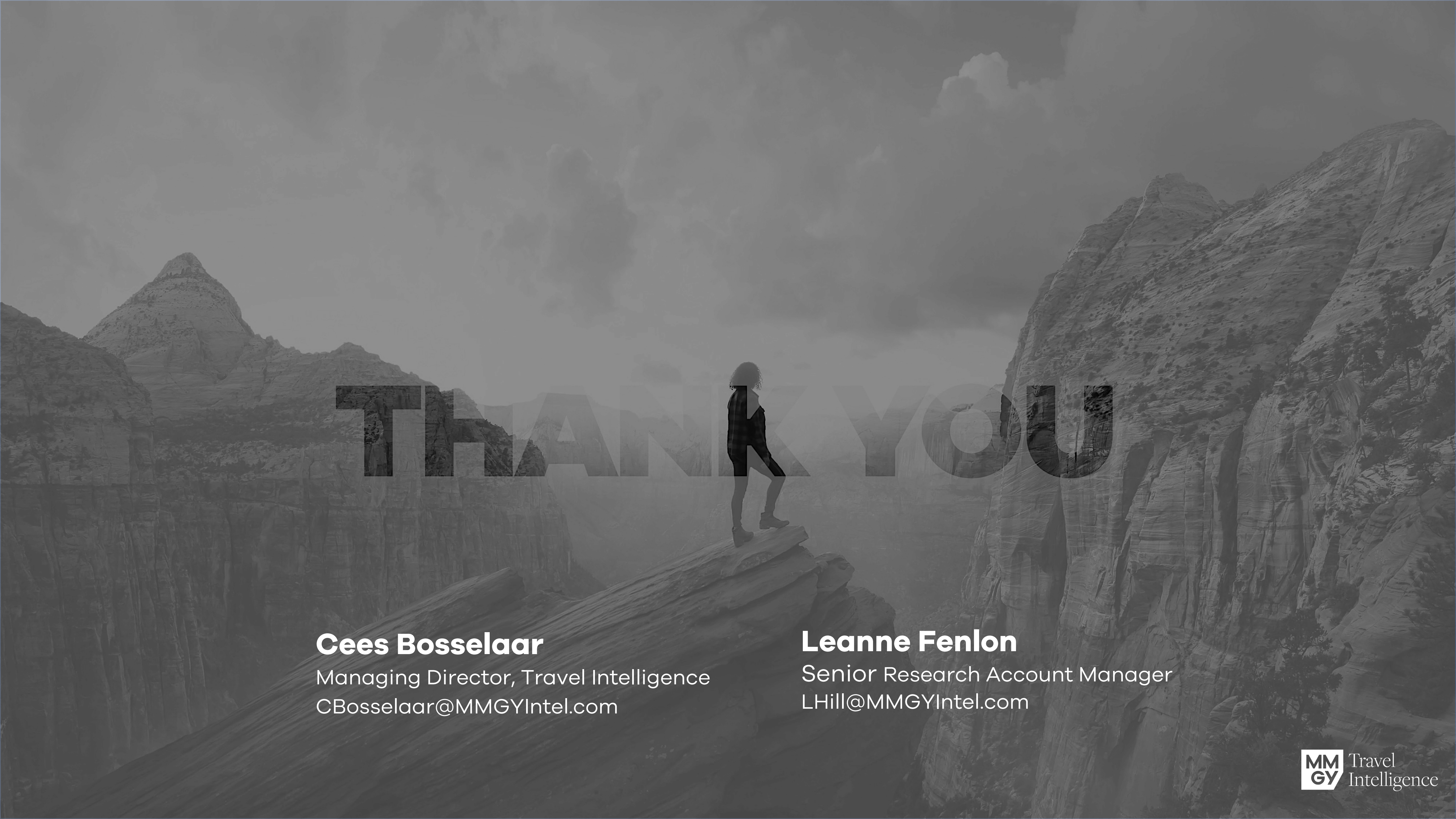
Source: MMGY Global's 2022 *Portrait of American International Travelers*™

Respondent Demographics

	Prospects	Non-prospects
Married/living together	84%	86%
Never married	5%	5%
Divorced/separated/widowed	11%	9%
4 years or less of high school	11%	25%
1-3 years of college	22%	25%
4 years of college	42%	29%
Some graduate school	3%	3%
Graduate/professional degree	22%	17%
Employed (full-time or part-time)	84%	80%
Retired	7%	15%
Temporarily unemployed	1%	2%
Homemaker (full-time)	7%	2%

Base: Prospects: n=382; Non-prospects: n=1,642

Source: MMGY Global's 2022 *Portrait of American International Travelers*™



THANK YOU

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