

Finland's Touristic Demand

What's Up seminar

April 6th, 2022

Bloom Consulting

Countries Regions and Cities

Recovery

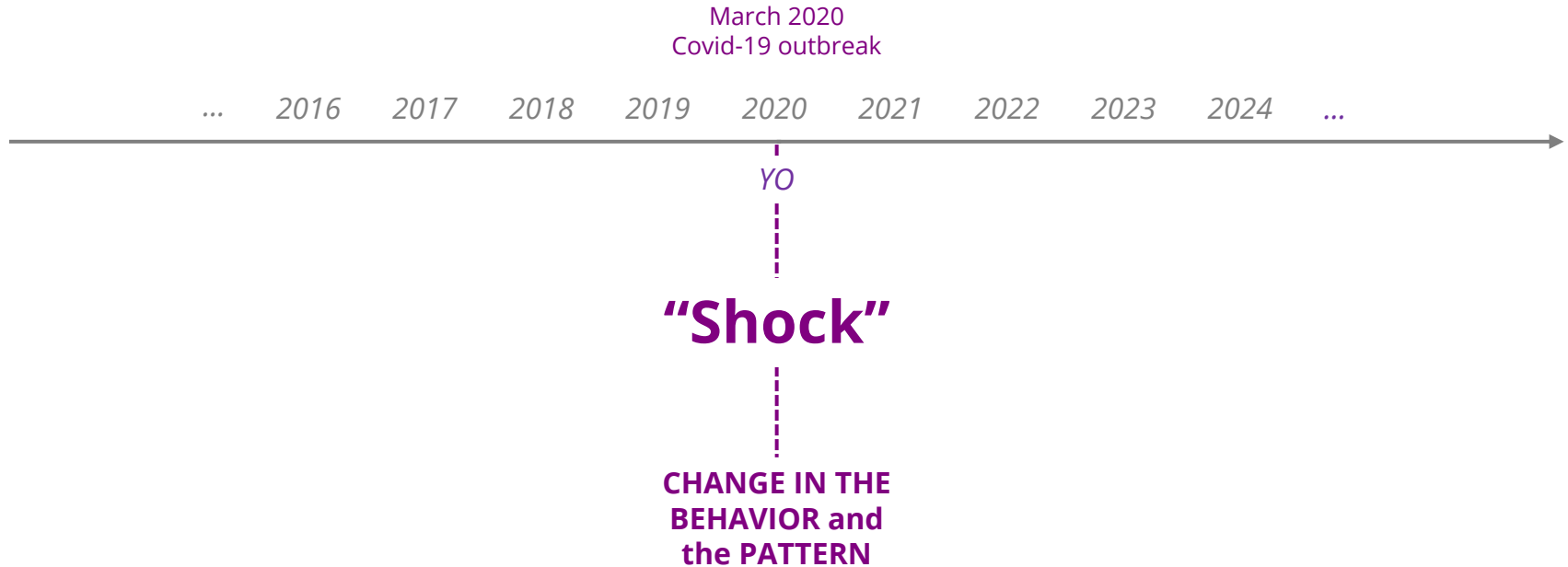
A world map with a purple background. Red circles of varying sizes are scattered across the map, representing data points. The circles are most concentrated in North America, Europe, and Asia. The map includes labels for continents and oceans in a light purple font. The word 'Recovery' is written in large white letters across the center of the map.

Reason 1: The “shock” in the touristic trend

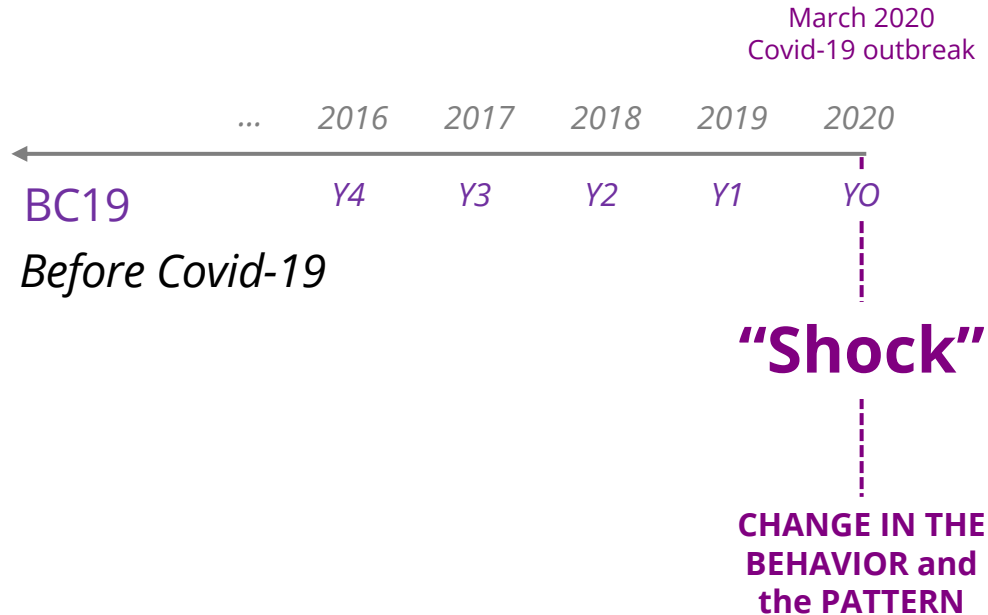
... 2016 2017 2018 2019 2020 2021 2022 2023 2024 ...



Reason 1: The “shock” in the touristic trend



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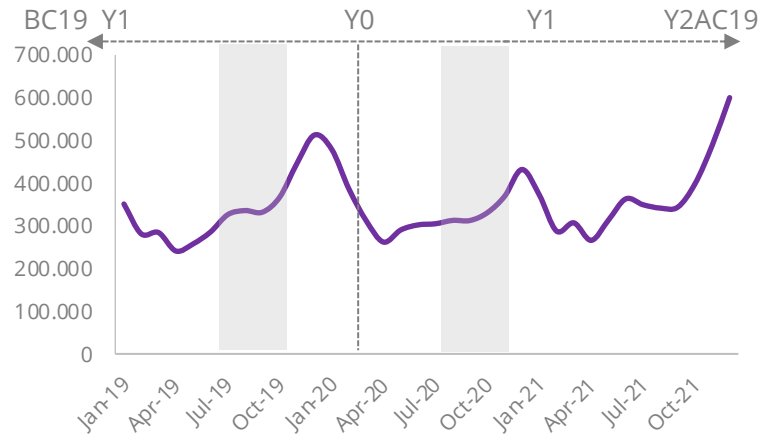


Reason 2:

The “erratic” behavior due to restrictions and lockdowns both at the destination and from origin (outbound markets)

Impact of Covid-19

YoY recovery in search demand compared to levels of before Covid-19 outbreak



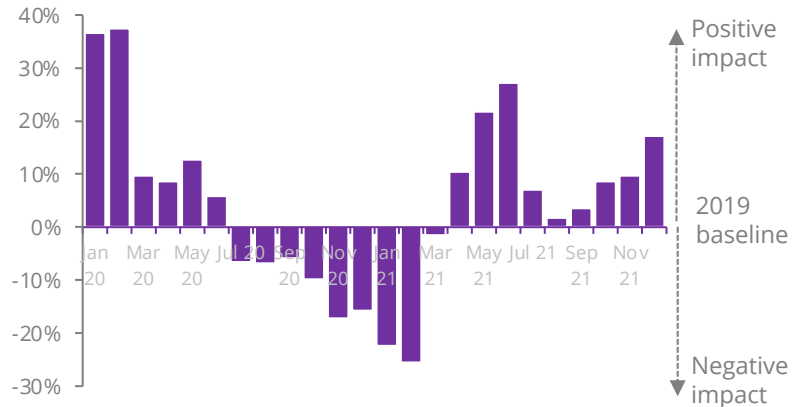
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The “erratic” behavior due to restrictions and lockdowns both at the destination and from origin (outbound markets)

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YoY recovery in search demand compared to levels of before Covid-19 outbreak

Baseline 2019



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The “erratic” behavior due to restrictions and lockdowns both at the destination and from origin (outbound markets)

Impact of Covid-19

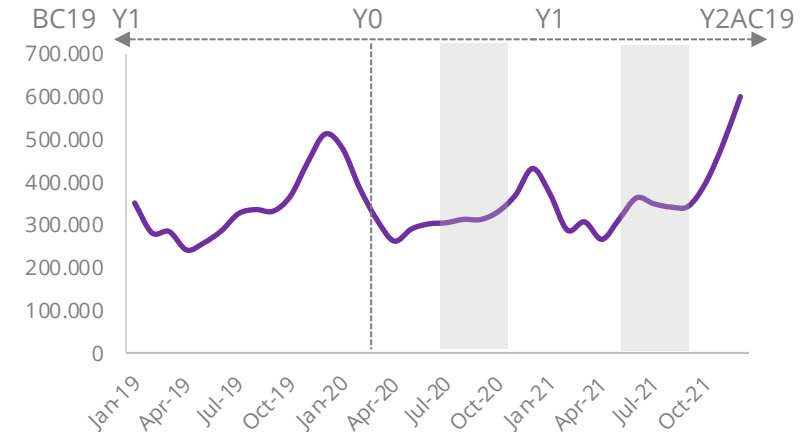
YoY recovery in search demand compared to levels of before Covid-19 outbreak

Baseline 2019



Recovery after Covid-19 impact

YoY Growth in search demand after Covid-19 outbreak



Reason 3: The “behavioral” change with new searches for travel restrictions

Touristic activities

Cultural Assets

Gastro Activities;
Historical Sites;
Museums;
Performing Arts;
Religious Sites & Pilgrimage;
Restaurants;
Traditional Markets;
UNESCO;
Urban Landmarks

Leisure and Entertainment

Entertainment Parks;
Aquarium & Zoo;
Beaches;
Gambling;
Golf;
Nightlife;
Shopping;
Special Events;
Wellbeing

Niche Markets

Business;
Couples;
Cruises;
Family;
LGBT;
Luxury Tourism;
Medical Tourism;
Sustainable & Rural;
Backpackers

Outdoor and Nature

Adventure and Outdoor;
Animal Watching;
Boating;
Diving;
Fishing & Hunting;
Hiking;
Natural Wonders and Parks;
Water Sports;
Winter Sports

General Information

Destinations;
Short Trips;
Tourism;
Tourism Attractions;
Tourism Packages;
Tours;
Travel

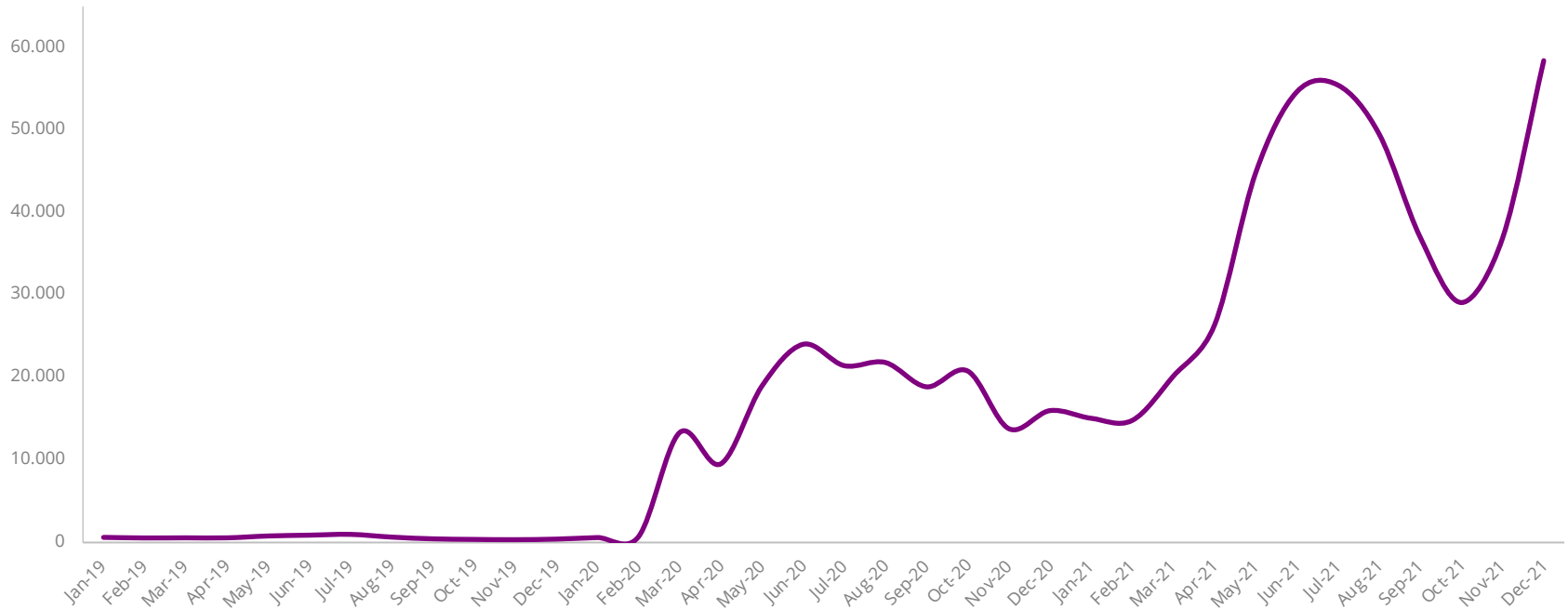
Accommodation

All-inclusive Accommodation;
Camping;
Holiday Accommodation;
Hostels and Bed & Breakfast;
Hotels and Resorts;
Luxury Accommodation;
Airbnb and other Special Accom;
Rural and sustainable Accom

Covid-19 strong impact

Consideration 3: The “behavioral” change with new searches for sanitary and travel

TRAVEL RESTRICTIONS search behavior (avg in the region)



5

takeaways

#Conclusion 1

New analysis framework: Russia, China and the Rest of the World





China



Rest of the World

Preliminary conclusion



Covid-19 had a strong hit in demand in 2020, and under the current Ukraine invasion there is NOT a market anymore. Recovery forecast in the long term.



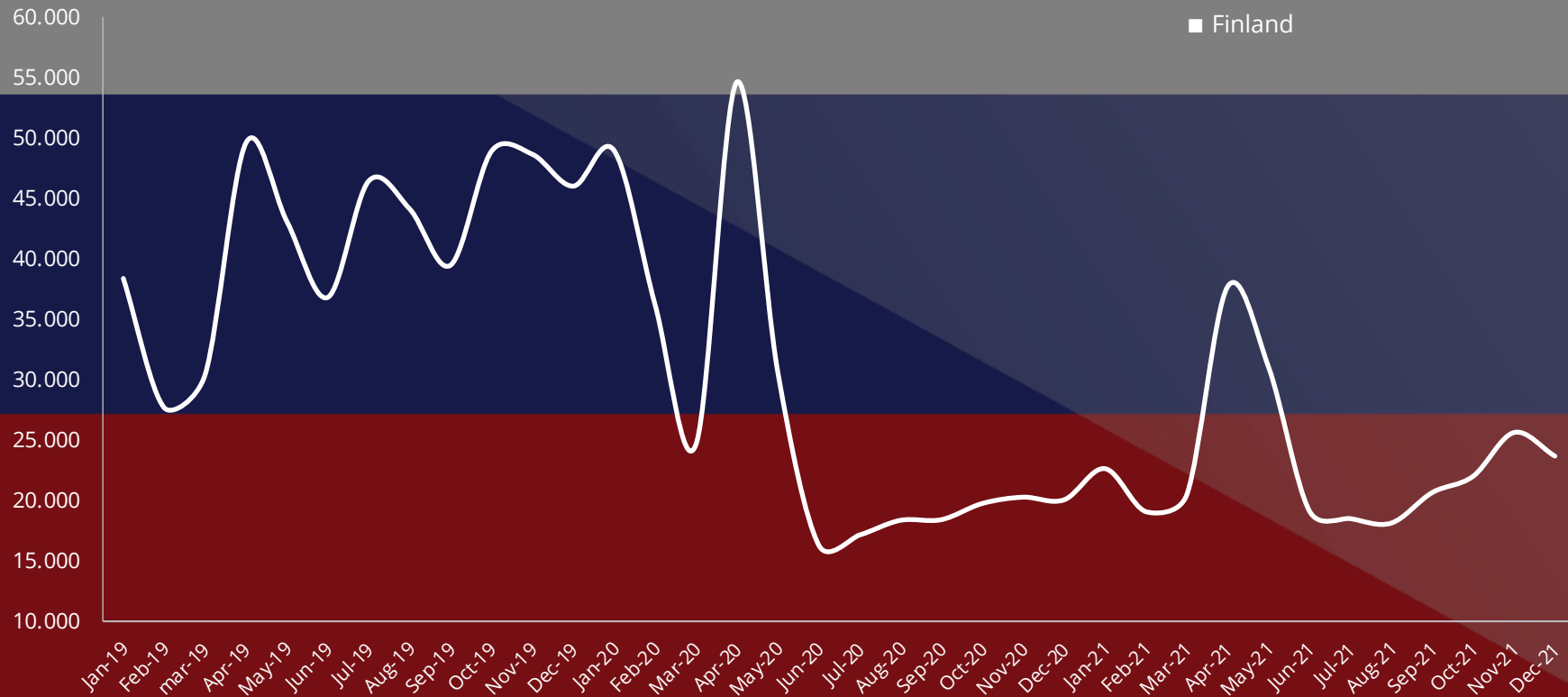
China



Rest of the World

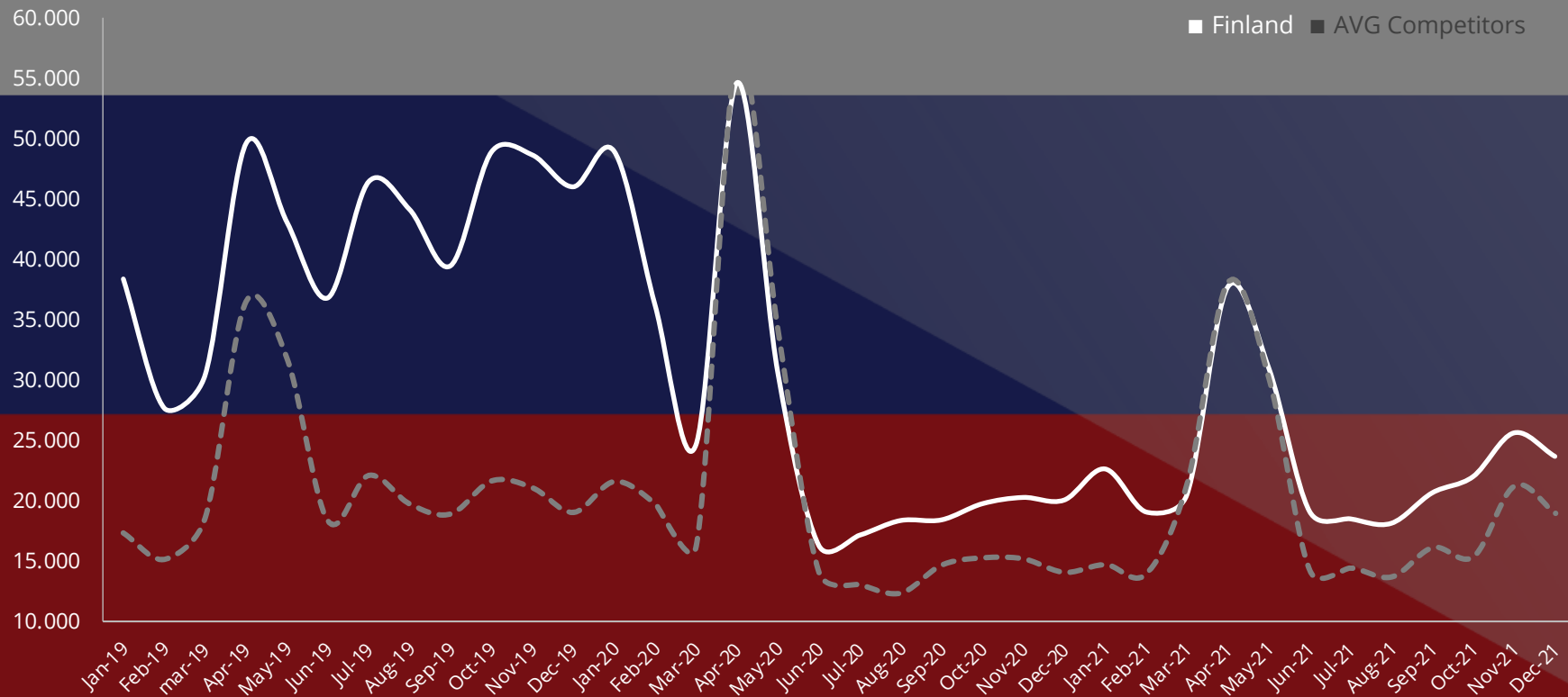
The Russian market has not recovered from Covid-19 ...

TM Russia Seasonality



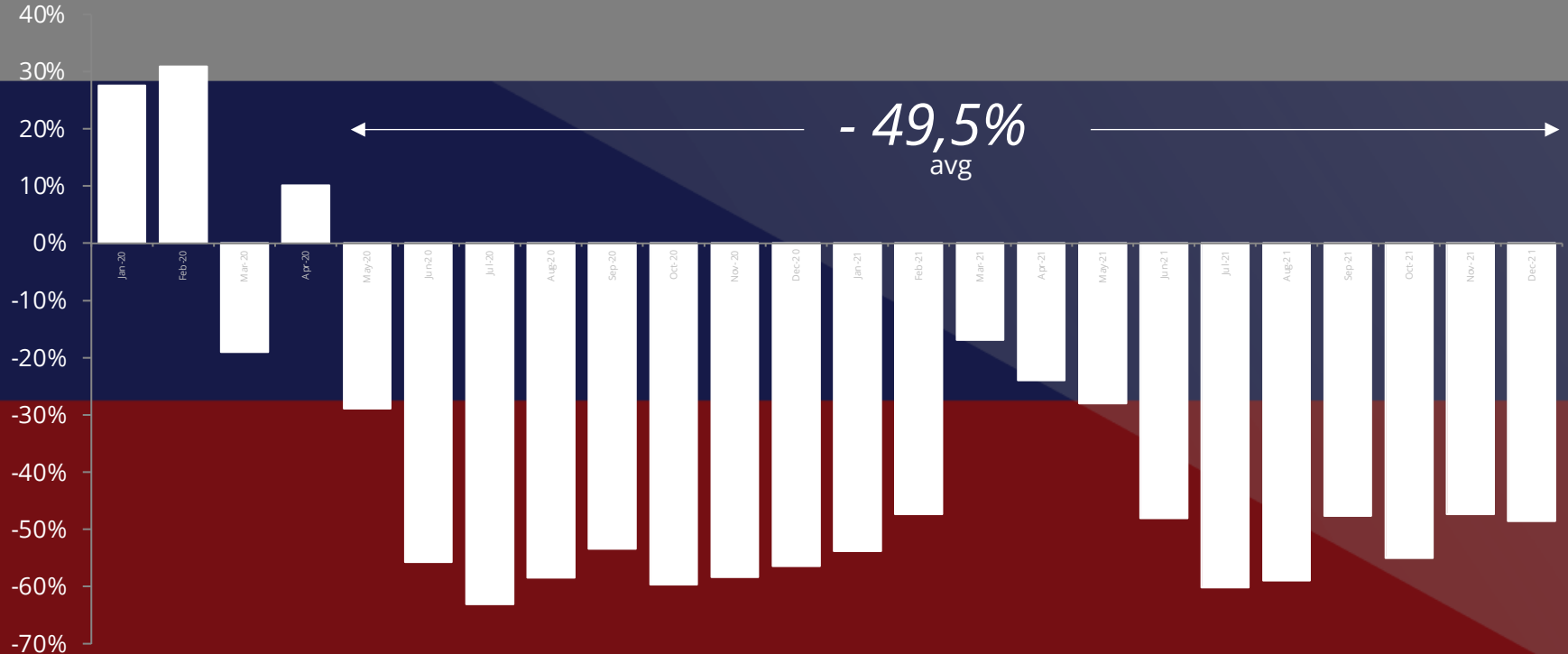
Neither for Finland nor for the Scandinavian competitors

TM Russia Seasonality



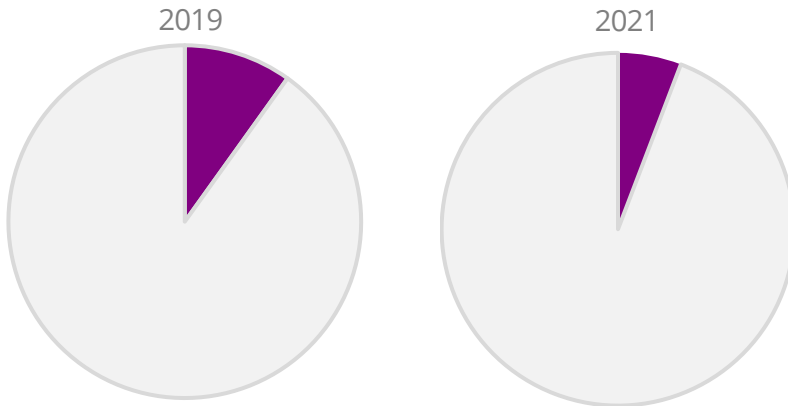
The Russian market is half than it used to be in 2019

TM Russia Seasonality Impact of Covid-19 Finland



Finland has a higher dependency both in volume and market share from the Russian market

 Finland

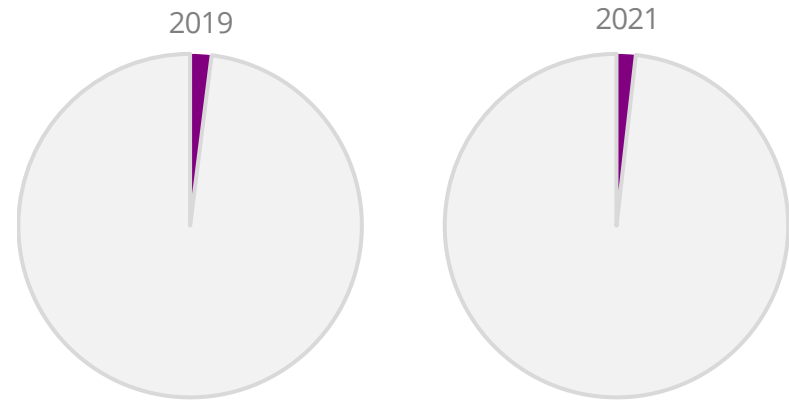


#3
499K searches
9,9% market share



#5
278 searches
5,8% market share
-25,3% CAGR

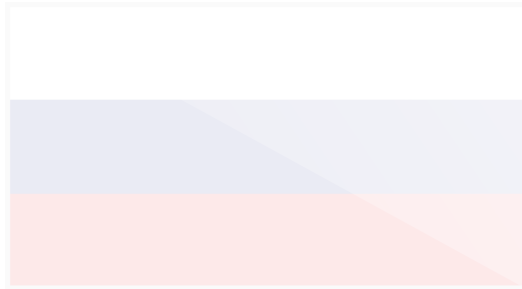
 Competitors



260 searches (AVG)
2,0% market share



232 searches (AVG)
1,8% market share
-4,6% AVG CAGR

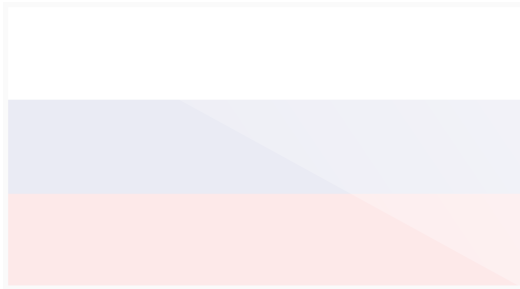


Russia



Rest of the World

Preliminary conclusion



Russia



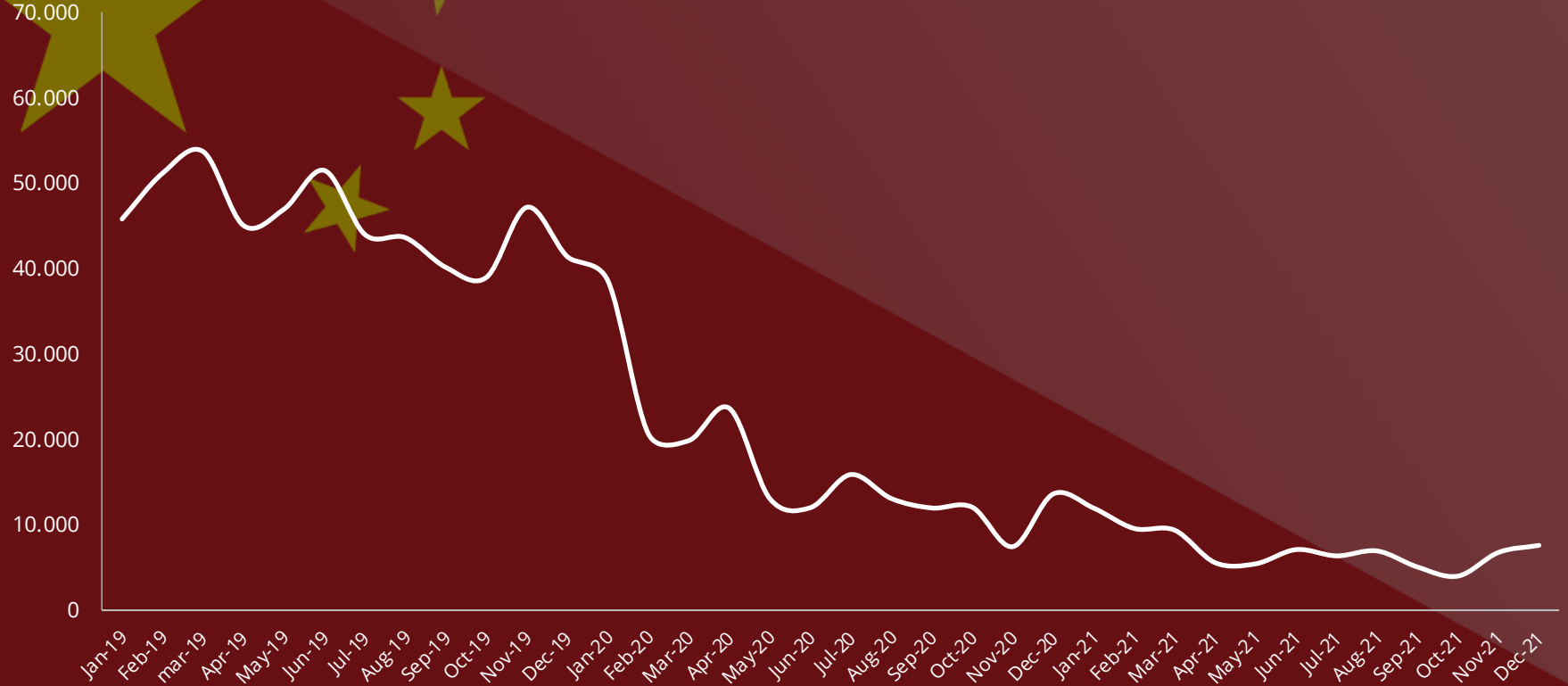
Strong restrictions of movement during Covid-19 are having a longer effect. Slow recovery forecast.



Rest of the World

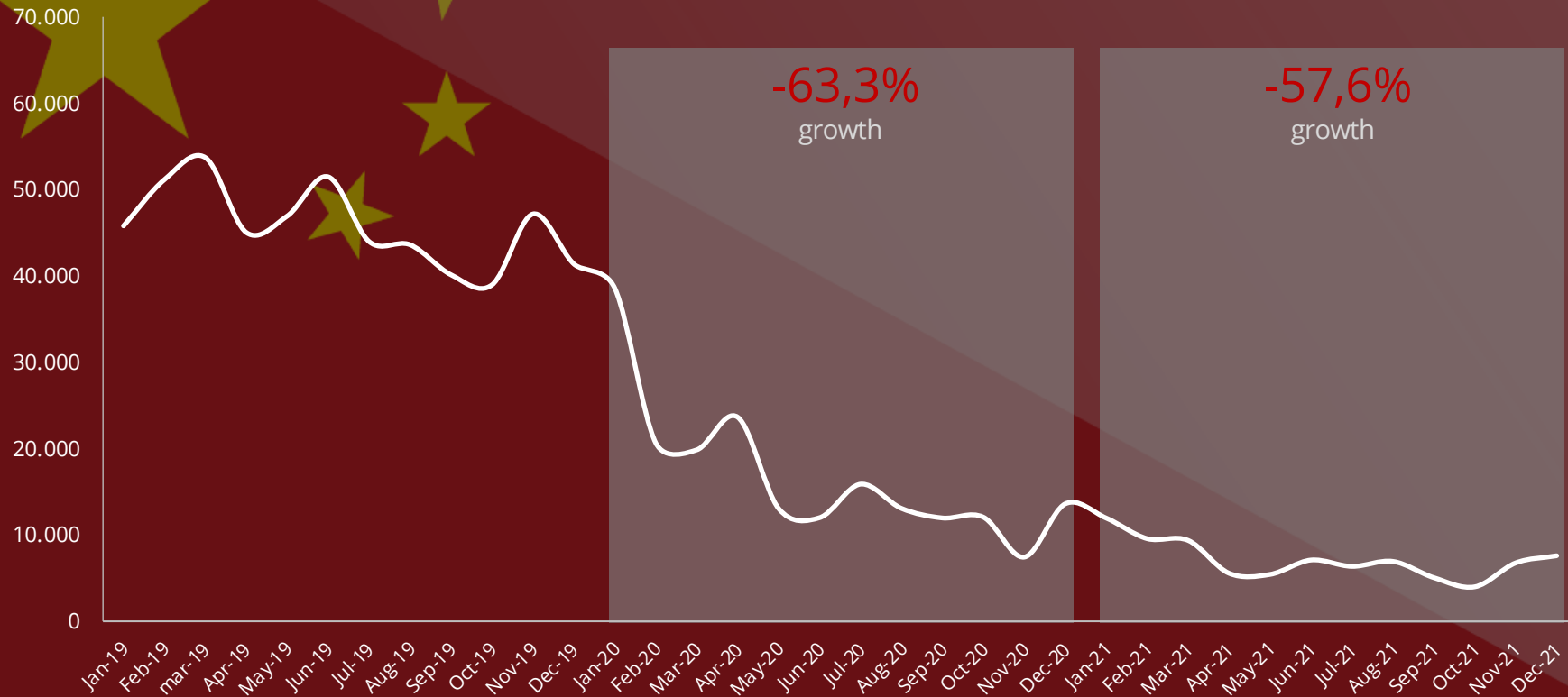
The Chinese markets has been decreasing during the last years

TM China Seasonality Finland ■ Finland



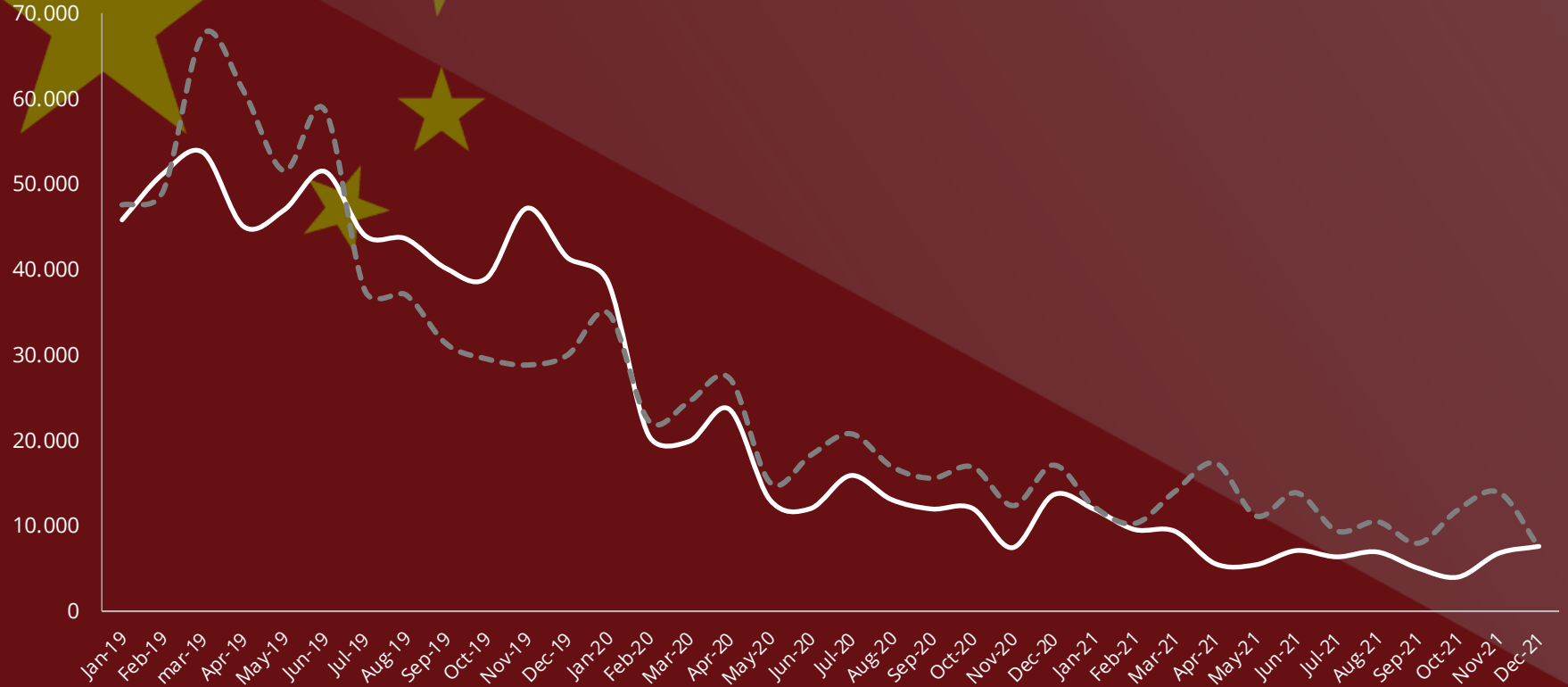
More strongly after the Covid-19 outbreak in January 2020

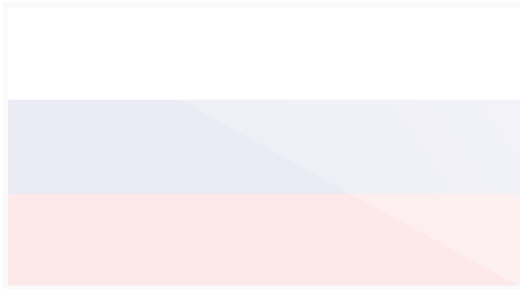
TM China Seasonality Finland ■ Finland



It is affecting Finland and all other Chinese outbound markets

TM China Seasonality Finland ■ Finland ■ AVG Competitors





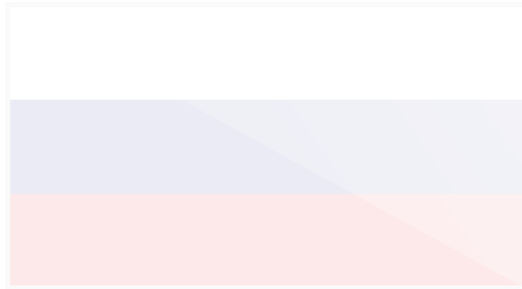
Russia



China



Preliminary conclusion



Russia



China

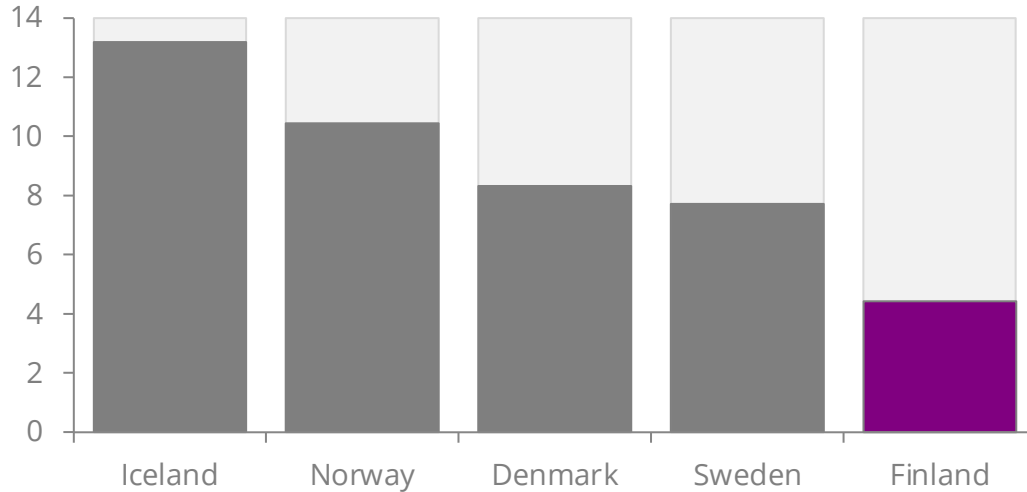


**This is the “future” and
“strategic” market for Finland
in the short-medium term.
Strong growth forecast.**

The benchmark in a post Covid-19 scenario remains stable

Benchmark Searches

Searches (million) Jan – Dec 2021 without Russian and Chinese markets

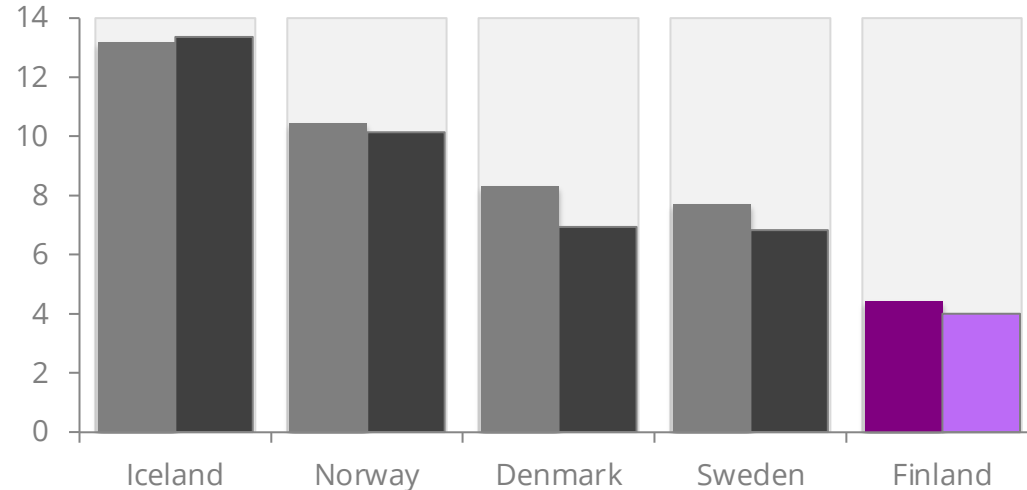


Denmark has taken advantage of this situation, putting a slight distance from Sweden

2021 vs 2019

Searches (million) Jan – Dec 2021 without Russian and Chinese markets

■ - 2019 ■ - 2021 ■ - 2019 ■ - 2021

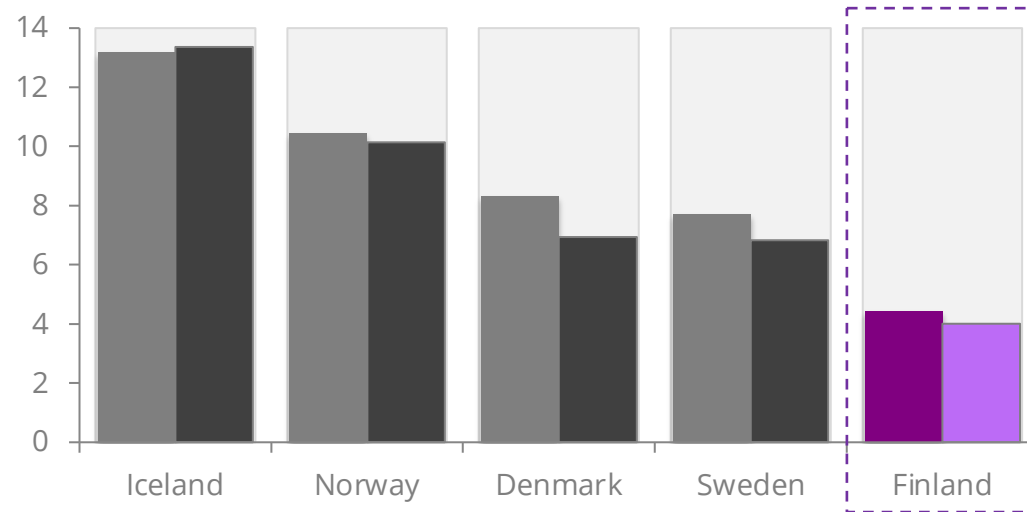


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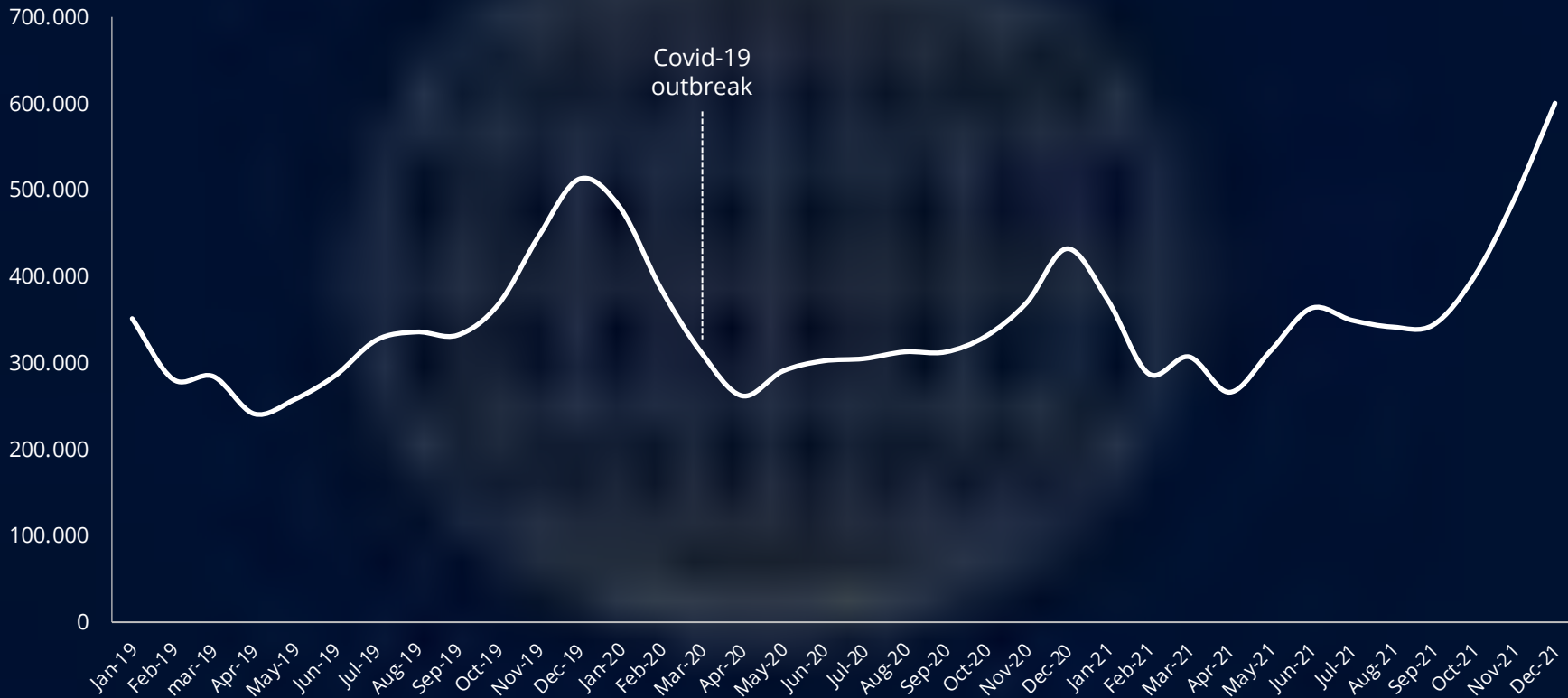
Searches (million) Jan – Dec 2021 without Russian and Chinese markets

■ - 2019 ■ - 2021 ■ - 2019 ■ - 2021



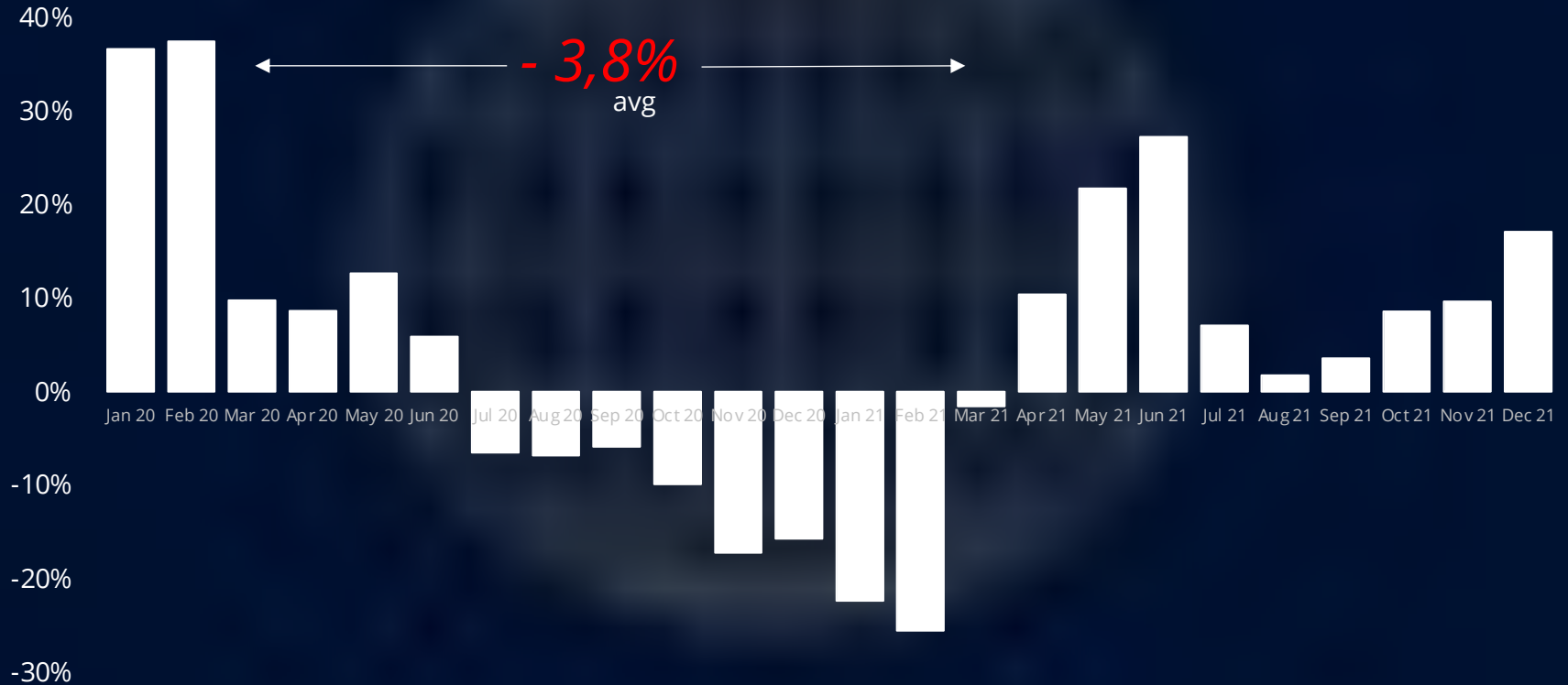
Finland's Seasonality

■ Finland without Russian and Chinese markets



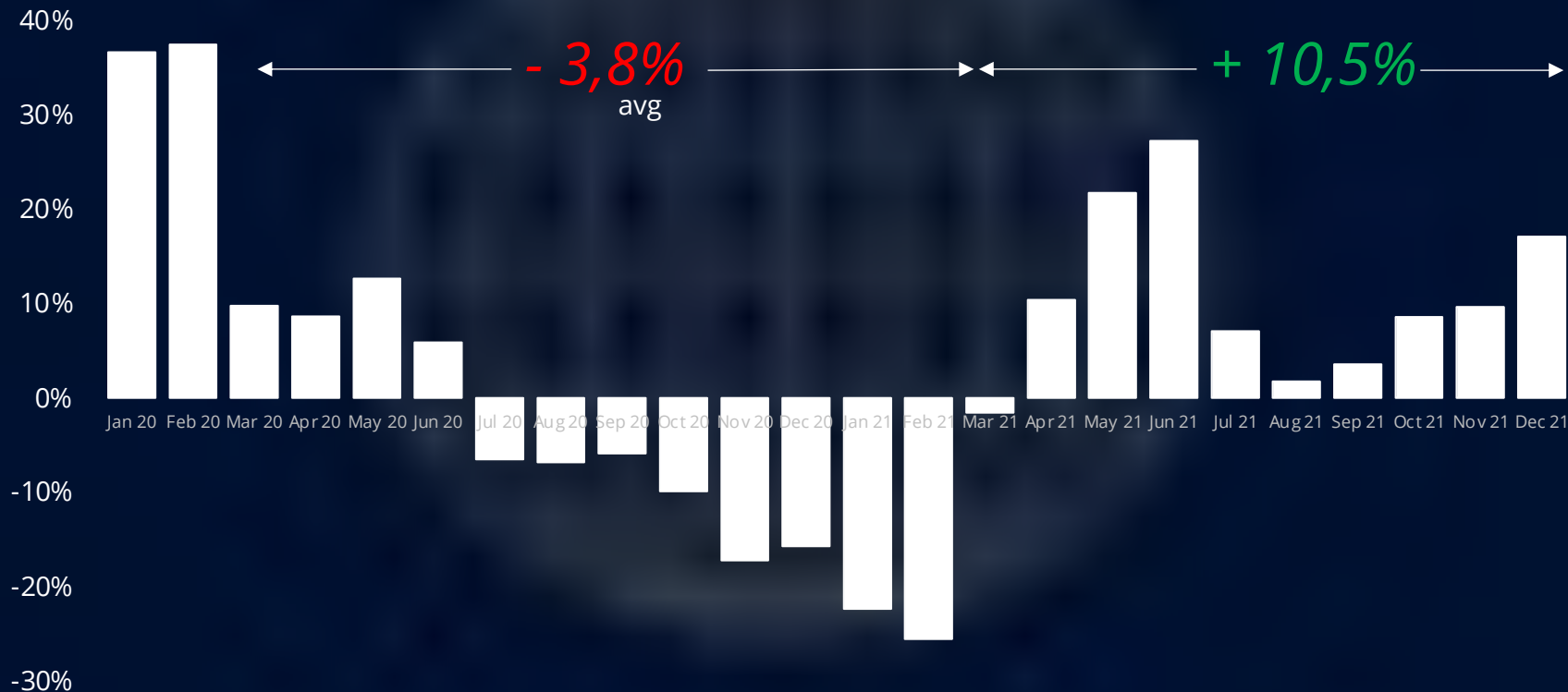
Small negative impact of Covid-19 in Finland

■ Finland without Russian and Chinese markets



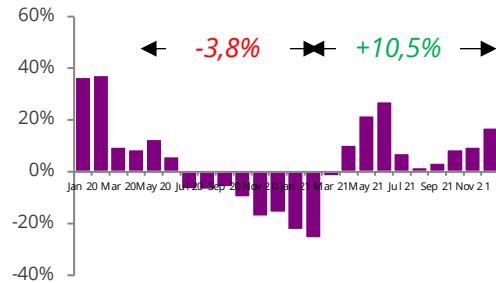
... and good recovery starting in March 2021

■ Finland without Russian and Chinese markets

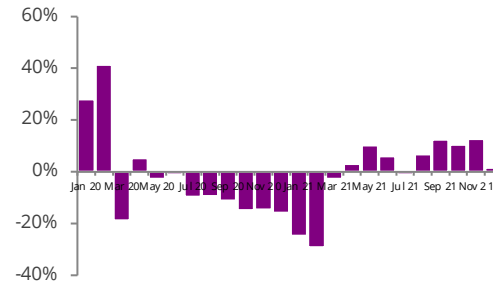


Covid-19 impact - Benchmark

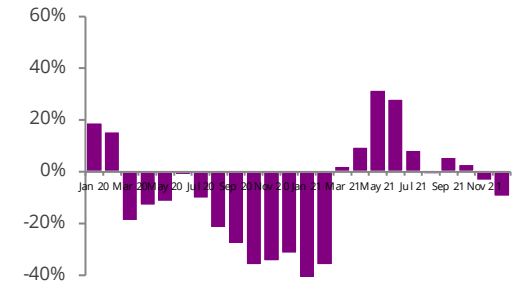
 Finland



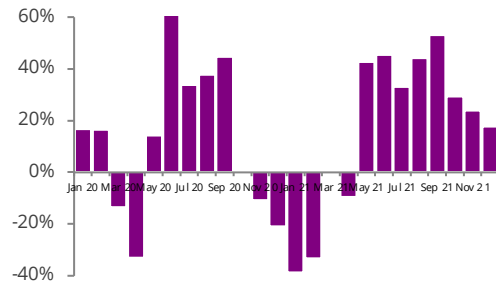
 Norway



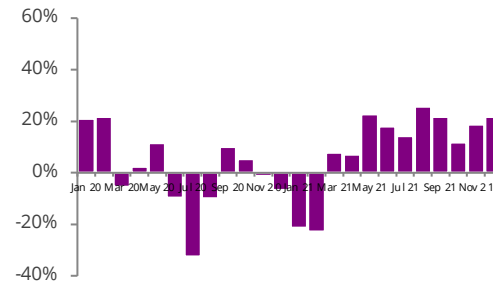
 Iceland



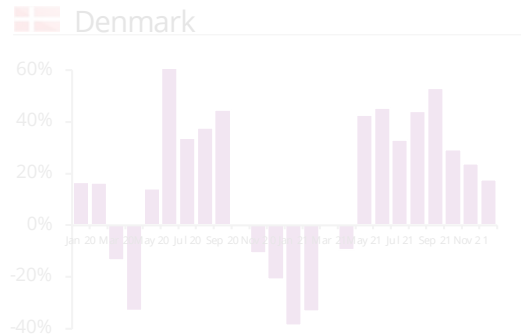
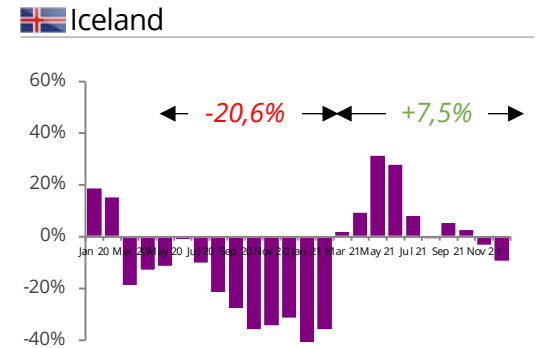
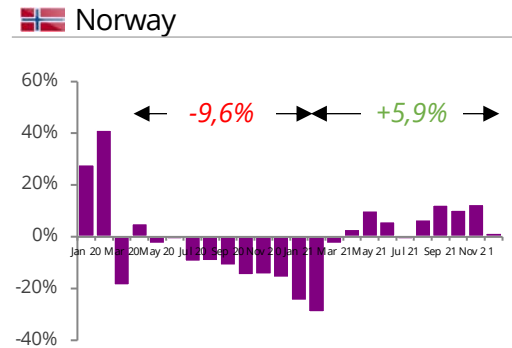
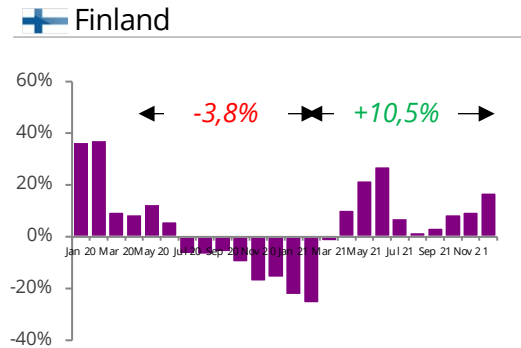
 Denmark



 Sweden

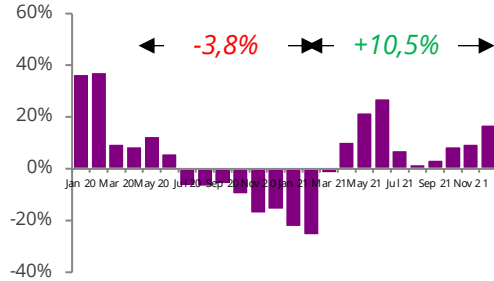


Norway and Iceland experience smaller recovery than Finland

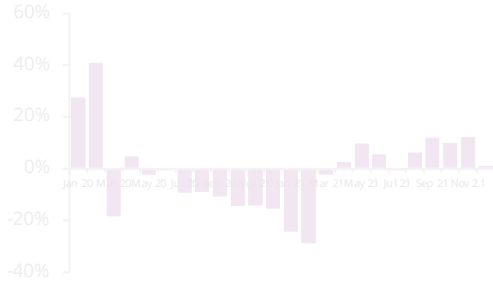


Denmark and Sweden have experienced a strong recovery

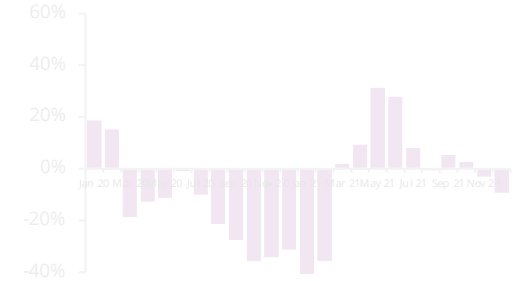
 Finland



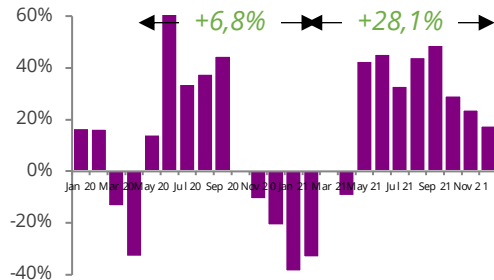
 Norway



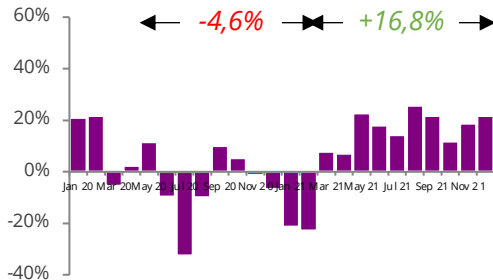
 Iceland



 Denmark



 Sweden



#Conclusion 2

There are different recovery speeds and levels depending on the market

Different recovery speeds from Covid-19

Strong Covid-19 Recovery

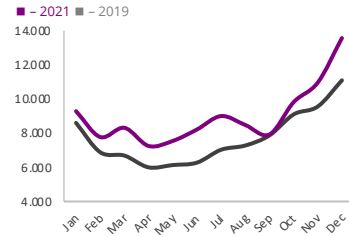
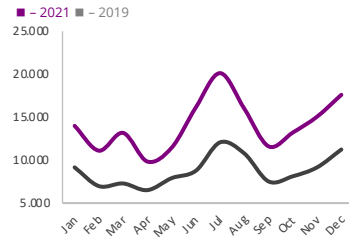
Covid-19 Recovery

Covid-19 Stable

No Covid-19 Recovery

Different recovery speeds from Covid-19

Strong Covid-19 Recovery

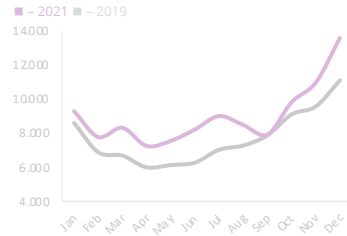
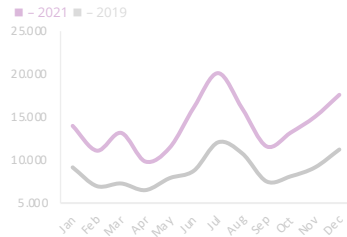


Different recovery speeds from Covid-19

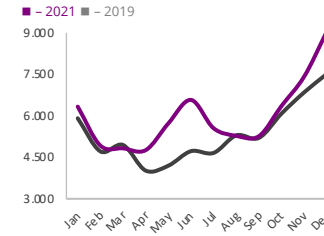
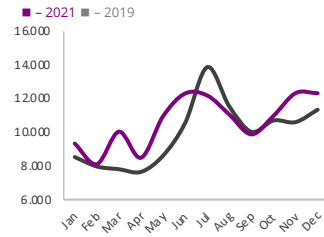


Different recovery speeds from Covid-19

Strong Covid-19 Recovery



Covid-19 Recovery

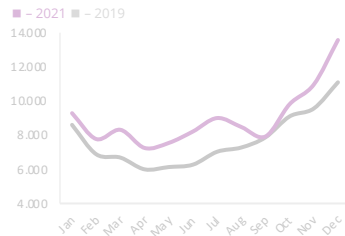
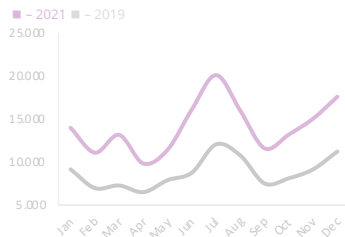


Different recovery speeds from Covid-19

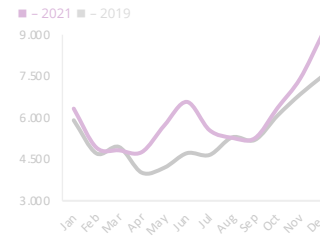
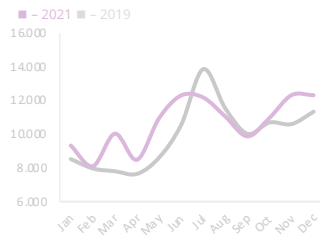


Different recovery speeds from Covid-19

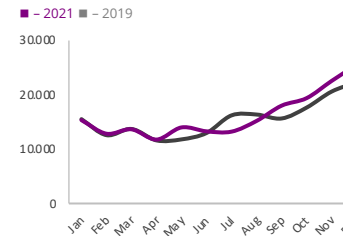
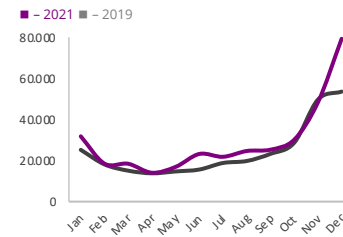
Strong Covid-19 Recovery



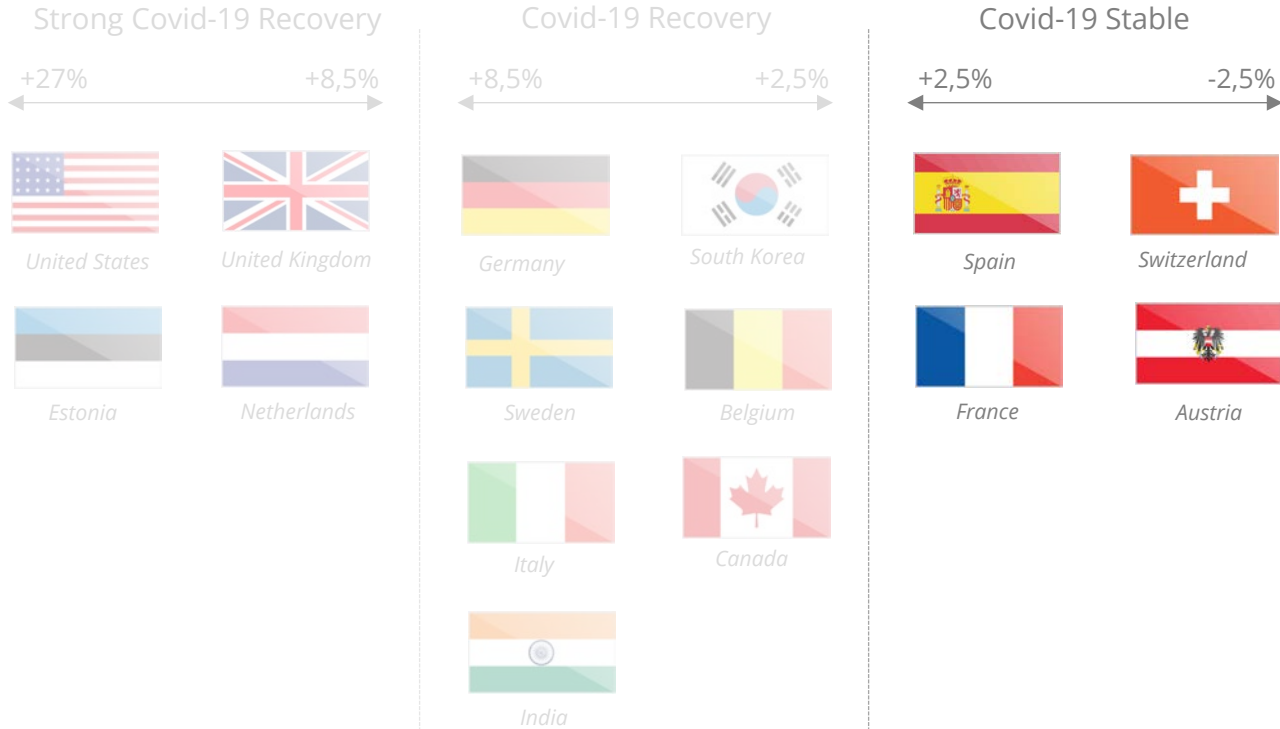
Covid-19 Recovery



Covid-19 Stable

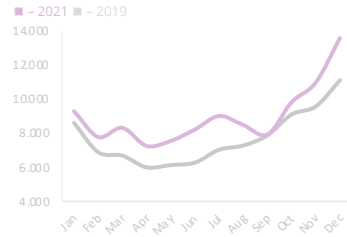
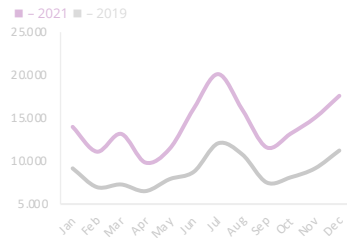


Different recovery speeds from Covid-19

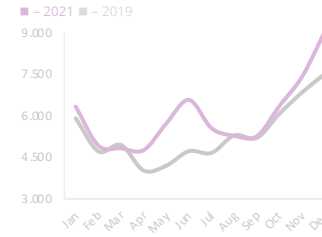
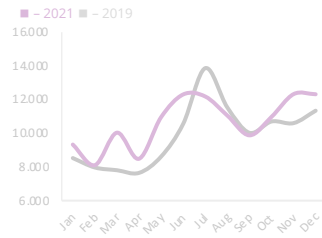


Different recovery speeds from Covid-19

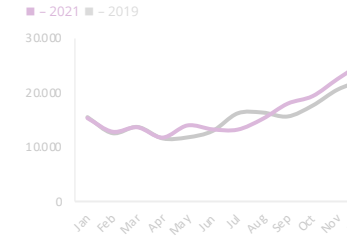
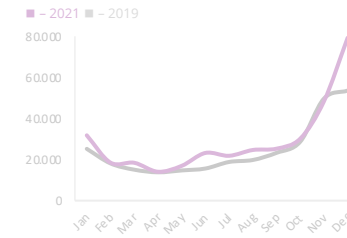
Strong Covid-19 Recovery



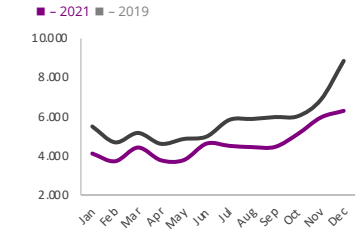
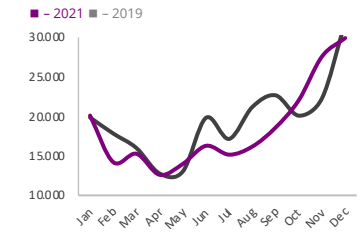
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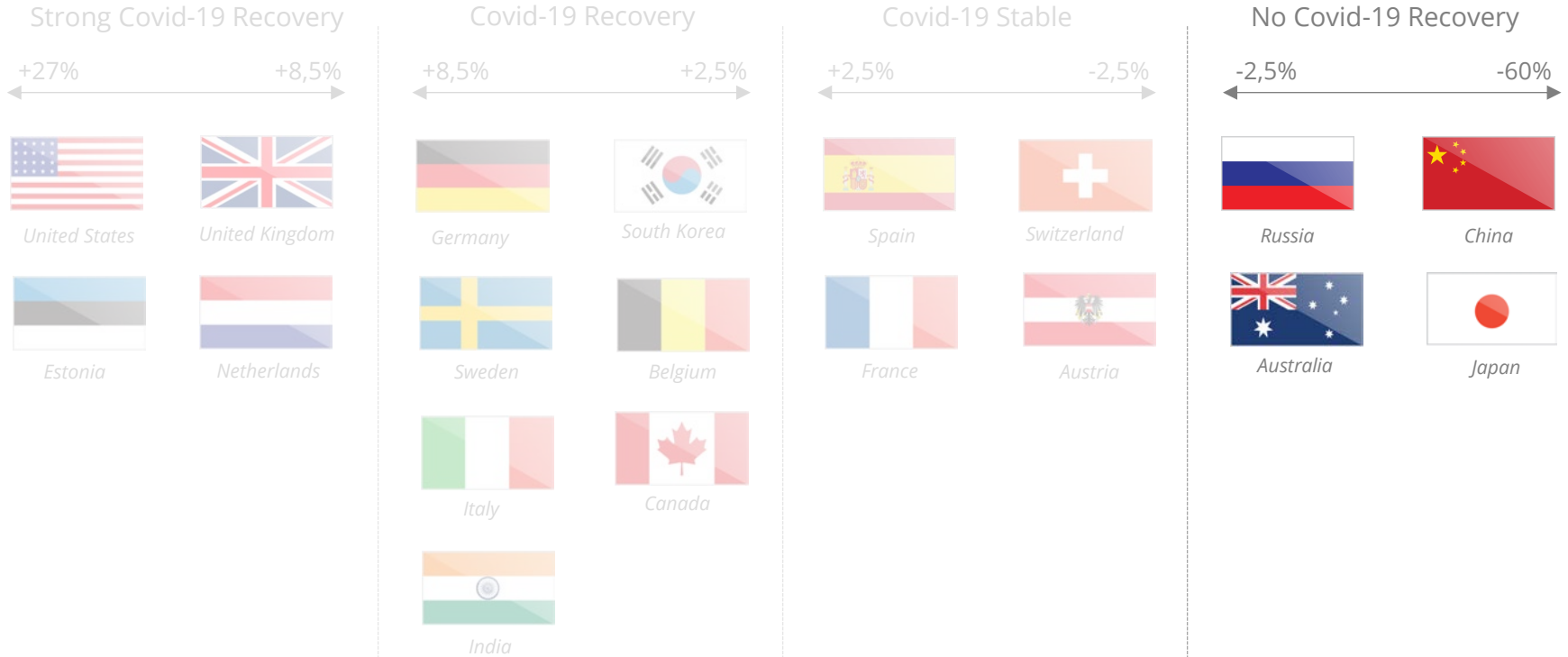
Covid-19 Stable



No Covid-19 Recovery



Different recovery speeds from Covid-19



Top markets have changed since Covid-19 started

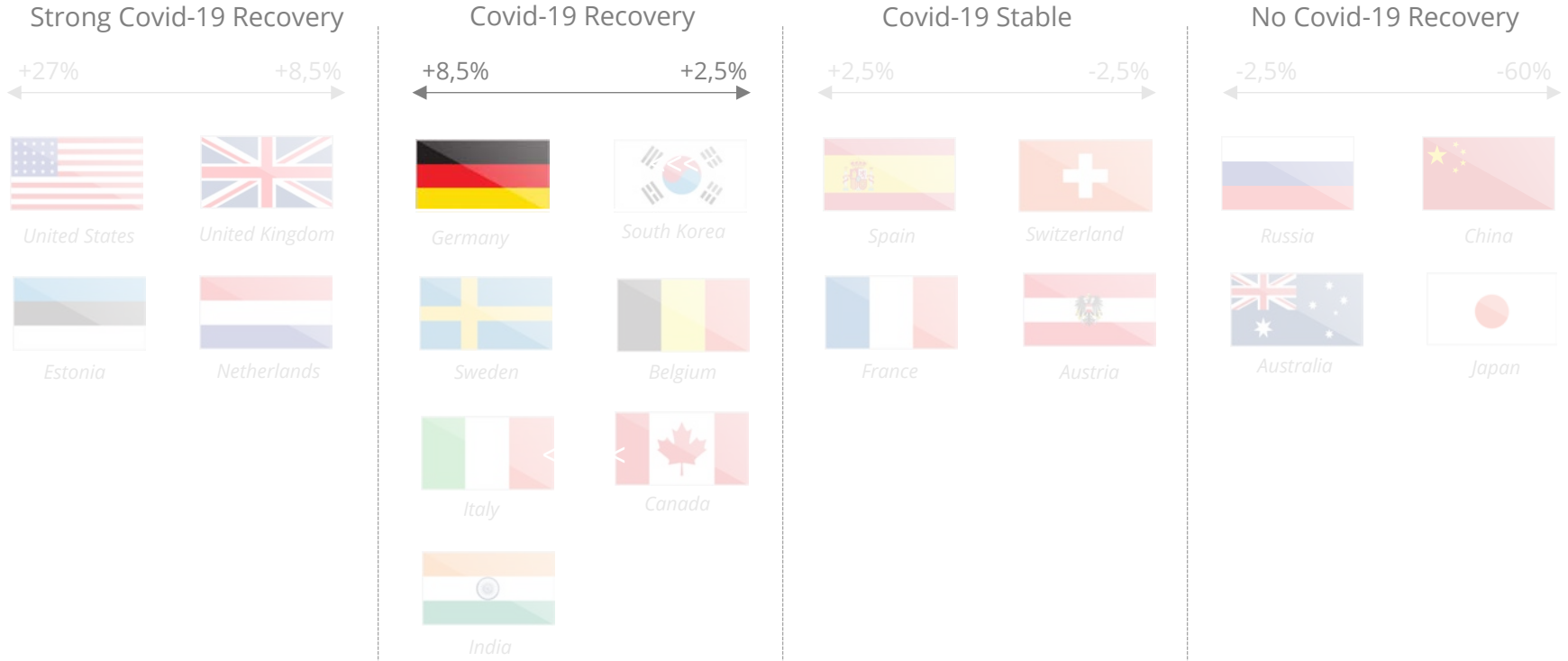
Target Markets Tourism

Target Markets – searches Jan-Dec 2021, position change in comparison to 2019

#	Target Market	Searches	Position
1	 Germany	499K	▲2
2	 Japan	484K	-
3	 United States	457K	▲2
4	 United Kingdom	351K	▲2
5	 Russia	277K	▼2
6	 Italy	249K	▼2
7	 France	221K	-
8	 Spain	194K	▲1
9	 Netherlands	169K	▲2
10	 Estonia	169K	▲4

#	Target Market	Searches	Position
11	 India	145K	▼1
12	 Sweden	127K	-
13	 Switzerland	112K	-
14	 Canada	107K	▲1
15	 China	85K	▼14
16	 Austria	80K	-
17	 Belgium	71K	▼1
18	 Australia	54K	▼1
19	 South Korea	45K	-

Different recovery speeds from Covid-19



Top markets have changed since Covid-19 started

Target Markets Tourism

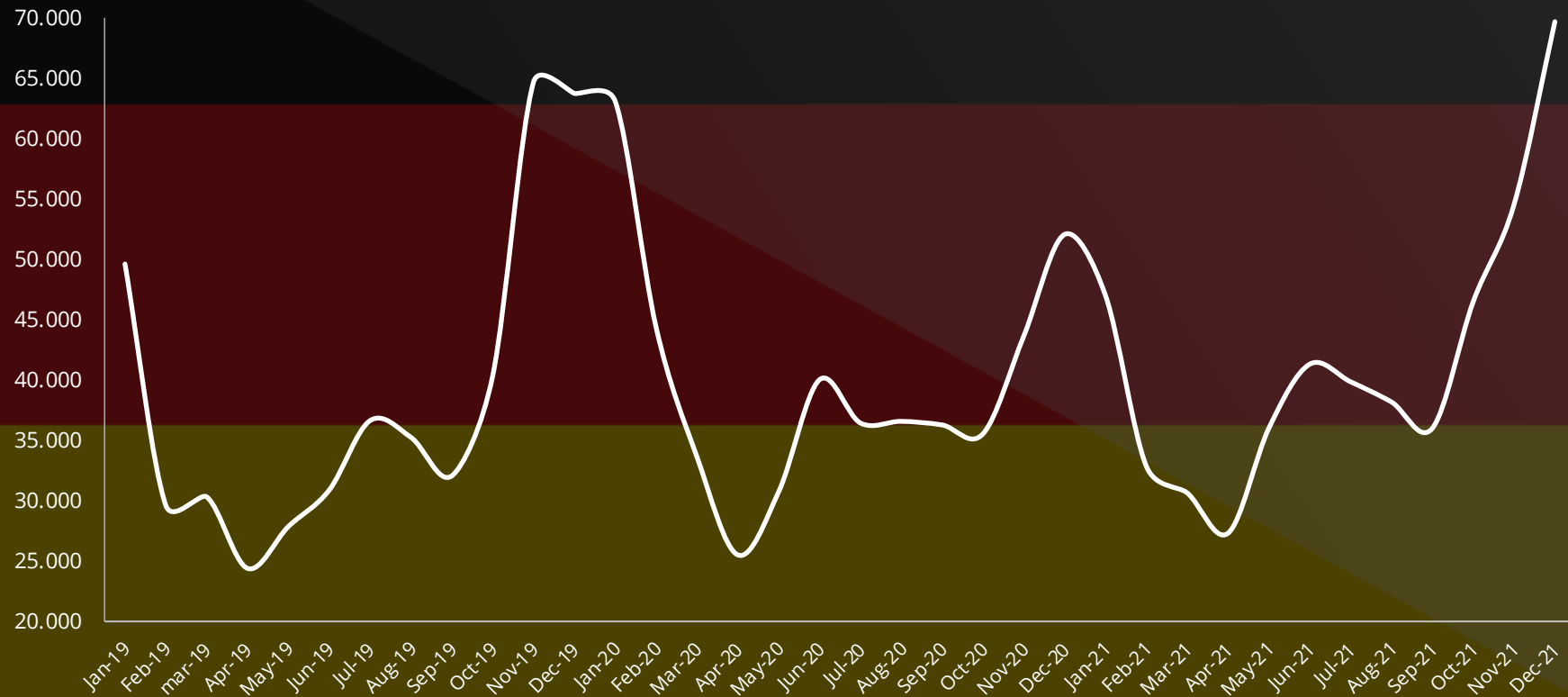
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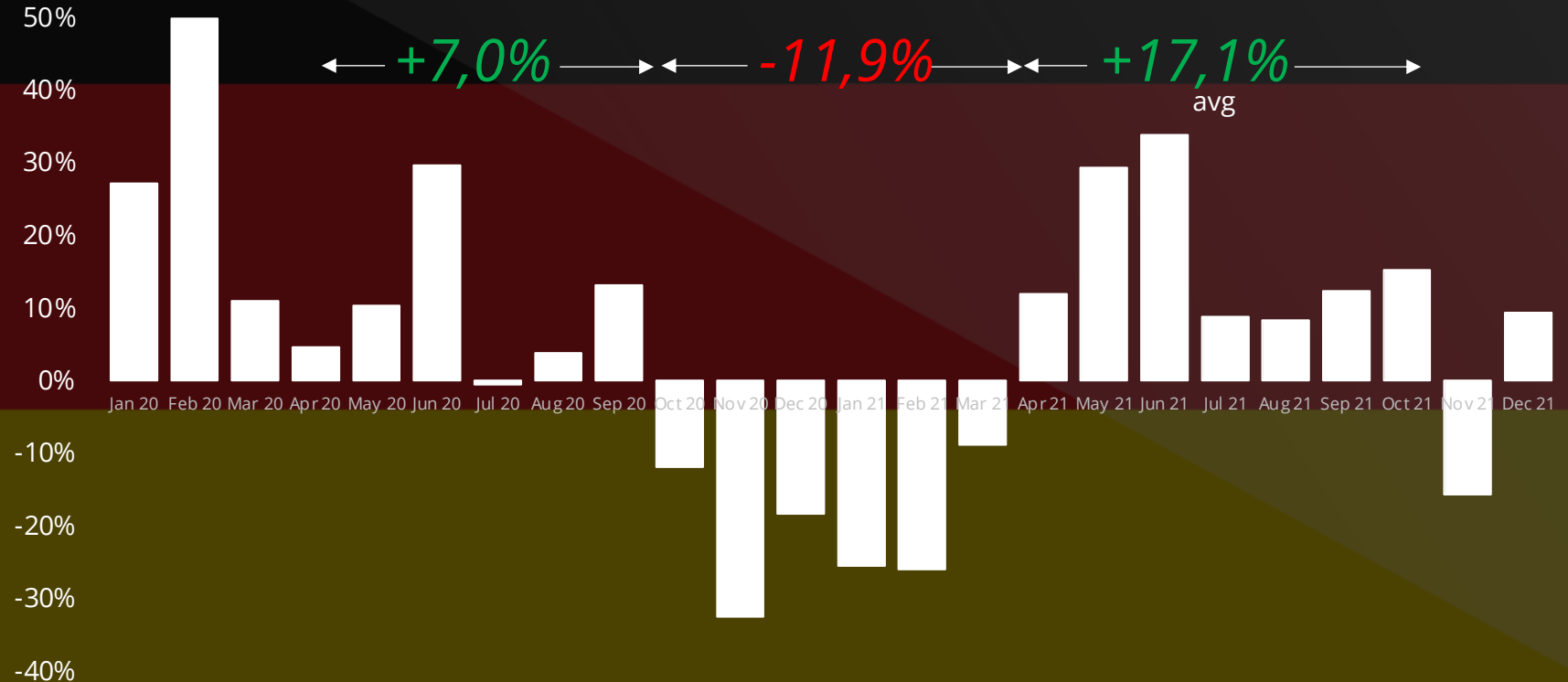
Seasonality Germany

TM Germany



Impact compared to pre-pandemic for Germany

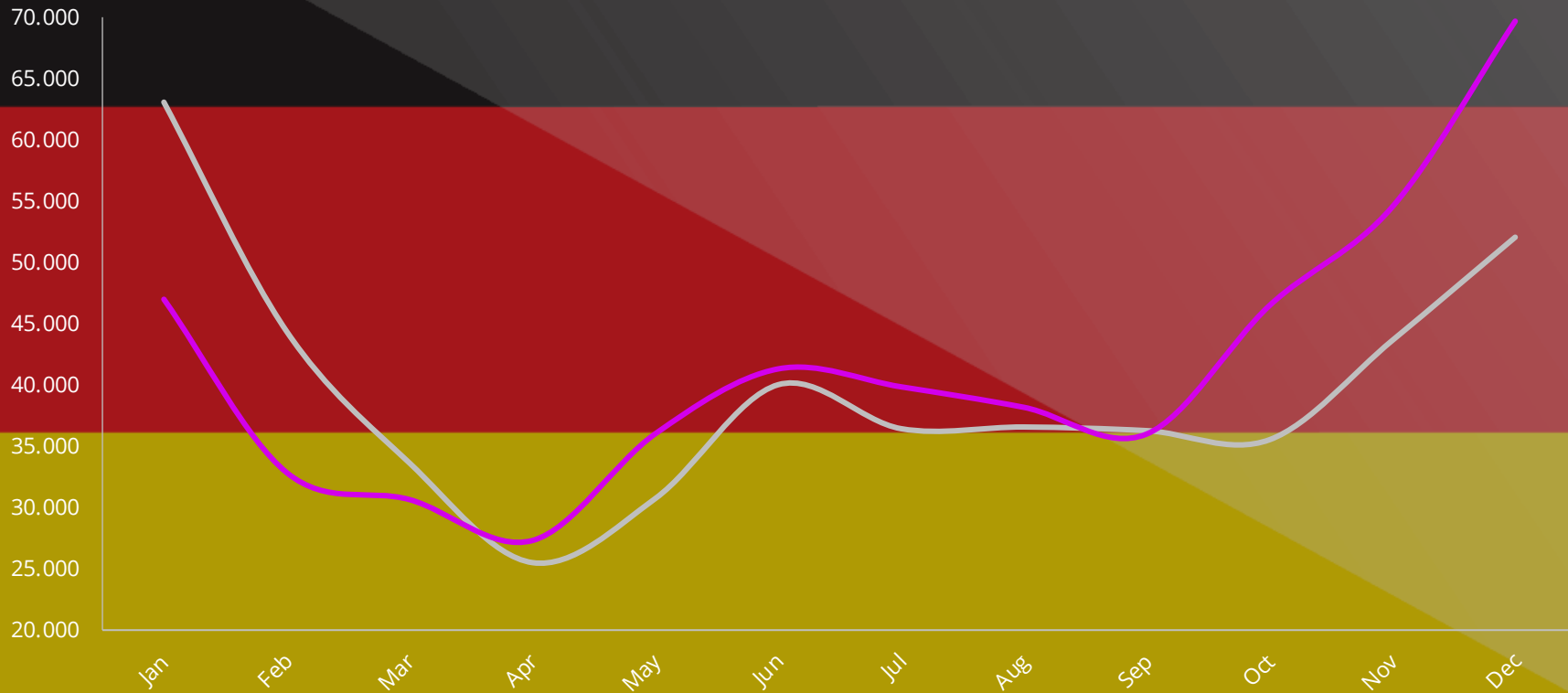
TM Germany



Demand is growing steady

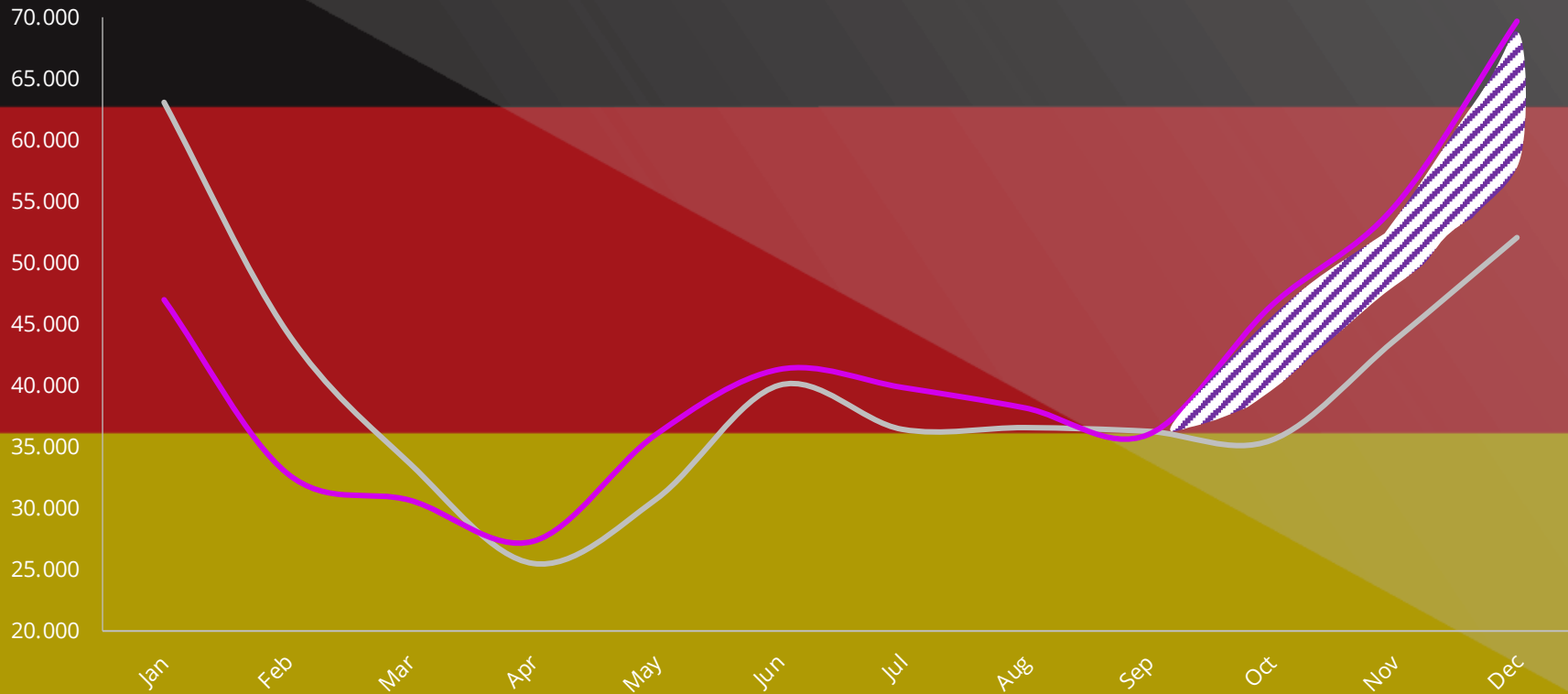
TM Germany

■ 2021 ■ 2020



Demand is growing steady, with a high impact on the Q4 2021

TM Germany ■ 2021 ■ 2020



#Conclusion 3

Finland has a very strong and established “touristic” image

Finland is known for...

Saunas



Cities / Towns



Northern Lights



Finland is known for...

Saunas



Cities / Towns



Northern Lights



Cabin Hotels



Santa Claus



Lakes



Top 15 MBTs over time,

2018 Tourism

Top15 Micro-Brandtags searches 2018, without Russian and Chinese markets

1	Saunas
2	Cities
3	Tourism
4	Travel
5	Northern Lights
6	Places to Visit
7	Glass Cabins
8	Lakes
9	Hotels
10	Holiday Packages
11	Santa Claus
12	Vacation Packages
13	Things to Do
14	Camping
15	Tours

2019 Tourism

Top15 Micro-Brandtags searches 2019, without Russian and Chinese markets

1	Saunas
2	Tourism
3	Cities
4	Northern Lights
5	Travel
6	Glass Cabins
7	Places to Visit
8	Holiday Packages
9	Santa Claus
10	Hotels
11	Vacation Packages
12	Lakes
13	Things to Do
14	Ice Hotels
15	Camping

2020 Tourism

Top15 Micro-Brandtags searches 2020, without Russian and Chinese markets

1	Saunas
2	Cities
3	Travel
4	Northern Lights
5	Tourism
6	Glass Cabins
7	Lakes
8	Santa Claus
9	Places to Visit
10	Holiday Packages
11	Hotels
12	Travel Restrictions
13	Vacation Packages
14	Skiing
15	Camping

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13	Vacation Packages
14	Camping
15	Ice Hotels

The image was established over time...

2018 Tourism

Top15 Micro-Brandtags searches 2018, without Russian and Chinese markets

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2	Cities
3	Tourism
4	Travel
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7	Glass Cabins
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15	Tours

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There is no new trends besides the appearance of the Travel Restrictions...

2018 Tourism

Top15 Micro-Brandtags searches 2018, without Russian and Chinese markets

- 1 Saunas
- 2 Cities
- 3 Tourism
- 4 Travel
- 5 Northern Lights
- 6 Places to Visit
- 7 Glass Cabins
- 8 Lakes
- 9 Hotels
- 10 Holiday Packages
- 11 Santa Claus
- 12 Vacation Packages
- 13 Things to Do
- 14 Camping
- 15 Tours

2019 Tourism

Top15 Micro-Brandtags searches 2019, without Russian and Chinese markets

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2020 Tourism

Top15 Micro-Brandtags searches 2020, without Russian and Chinese markets

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- 2 Cities
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- 11 Hotels
- 12 Travel Restrictions
- 13 Vacation Packages
- 14 Skiing
- 15 Camping

2021 Tourism

Top15 Micro-Brandtags searches 2021, without Russian and Chinese markets

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- 2 Cities
- 3 Travel
- 4 Northern Lights
- 5 Travel Restrictions
- 6 Glass Cabins
- 7 Tourism
- 8 Santa Claus
- 9 Places to Visit
- 10 Hotels
- 11 Lakes
- 12 Holiday Packages
- 13 Vacation Packages
- 14 Camping
- 15 Ice Hotels

There is no new trends besides the appearance of the Travel Restrictions, and decrease of the generic searches

2018 Tourism

Top15 Micro-Brandtags searches 2018, without Russian and Chinese markets

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2	Cities
3	Tourism
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13	Vacation Packages
14	Camping
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Covid-19 confirms the change in behavior for...

The fastest growing activities

Forests



Cities



Midnight Sun



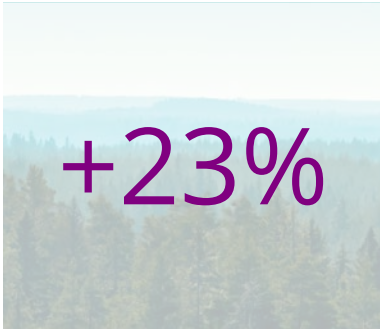
Lakes



Covid-19 confirms the change in behavior for...

The fastest growing activities

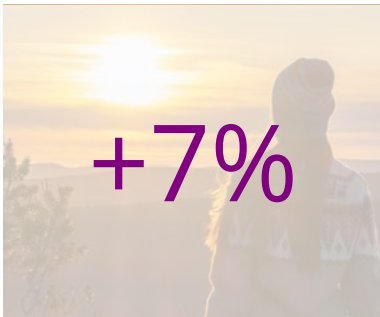
Forests



Cities



Midnight Sun



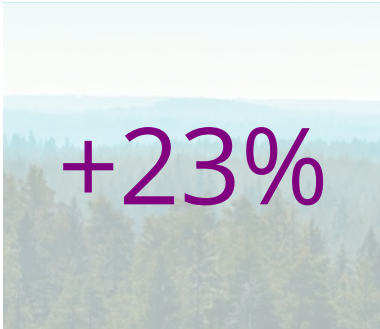
Lakes



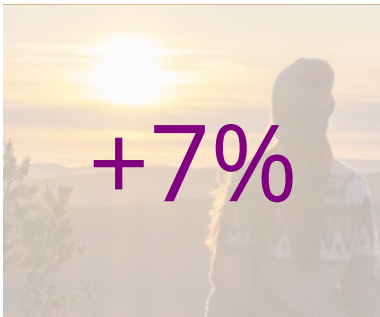
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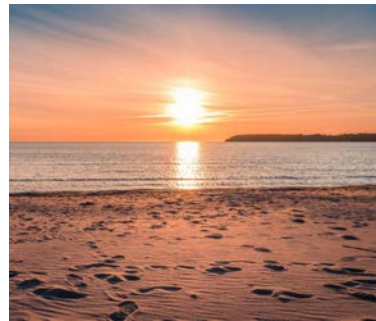


Emerging brandtags

Holiday Houses



Beaches



Natural Wonders



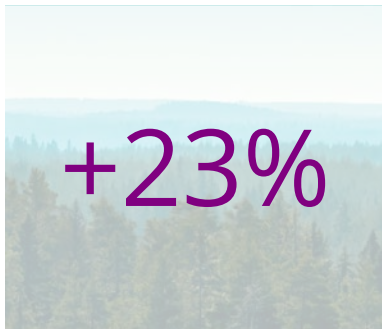
Wood Houses



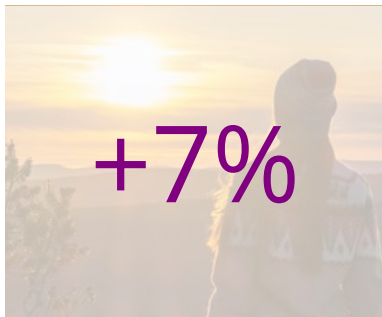
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Midnight Sun



Cities



Lakes



Emerging brandtags

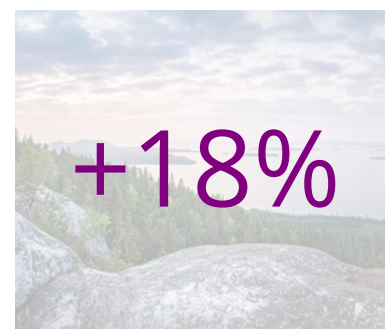
Holiday Houses



Beaches



Natural Wonders



Wood Houses

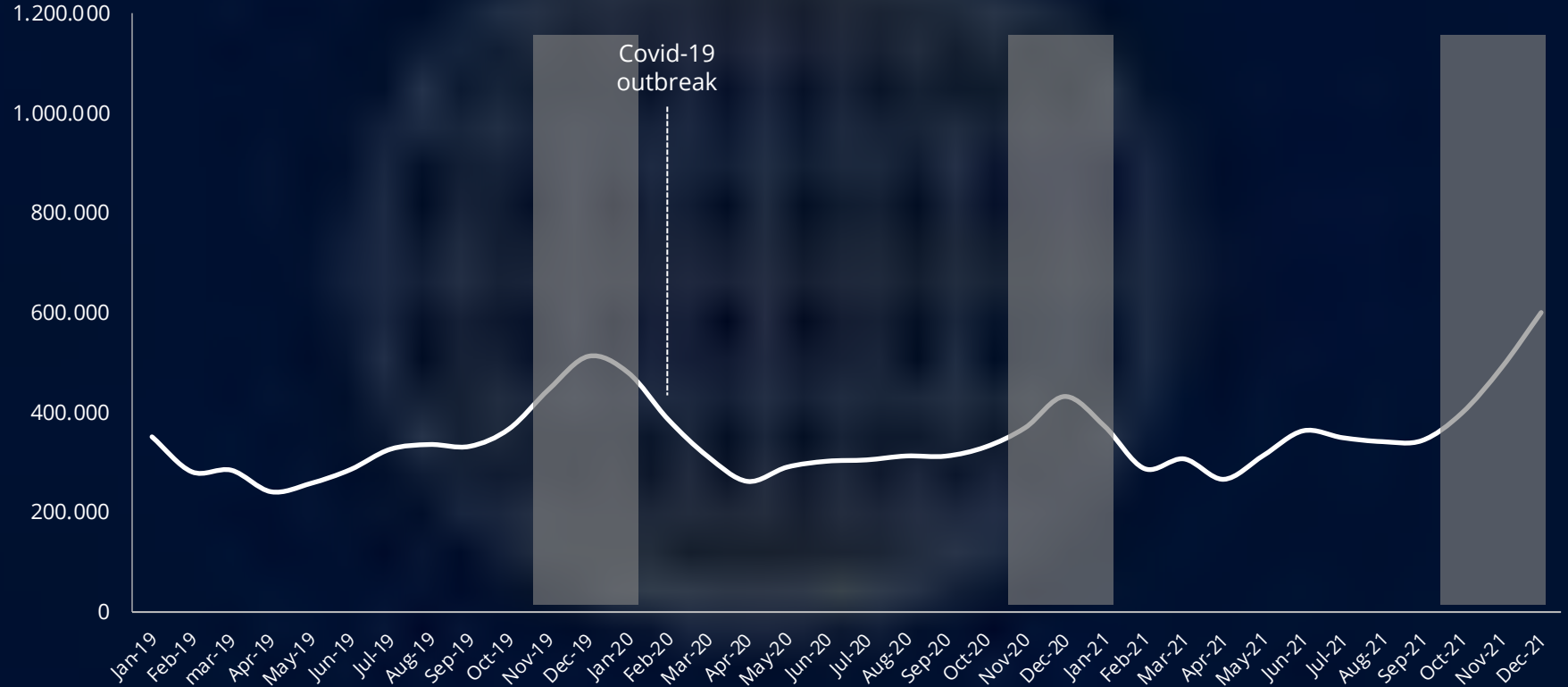


#Conclusion 4

The beginning of the
summer season trend?

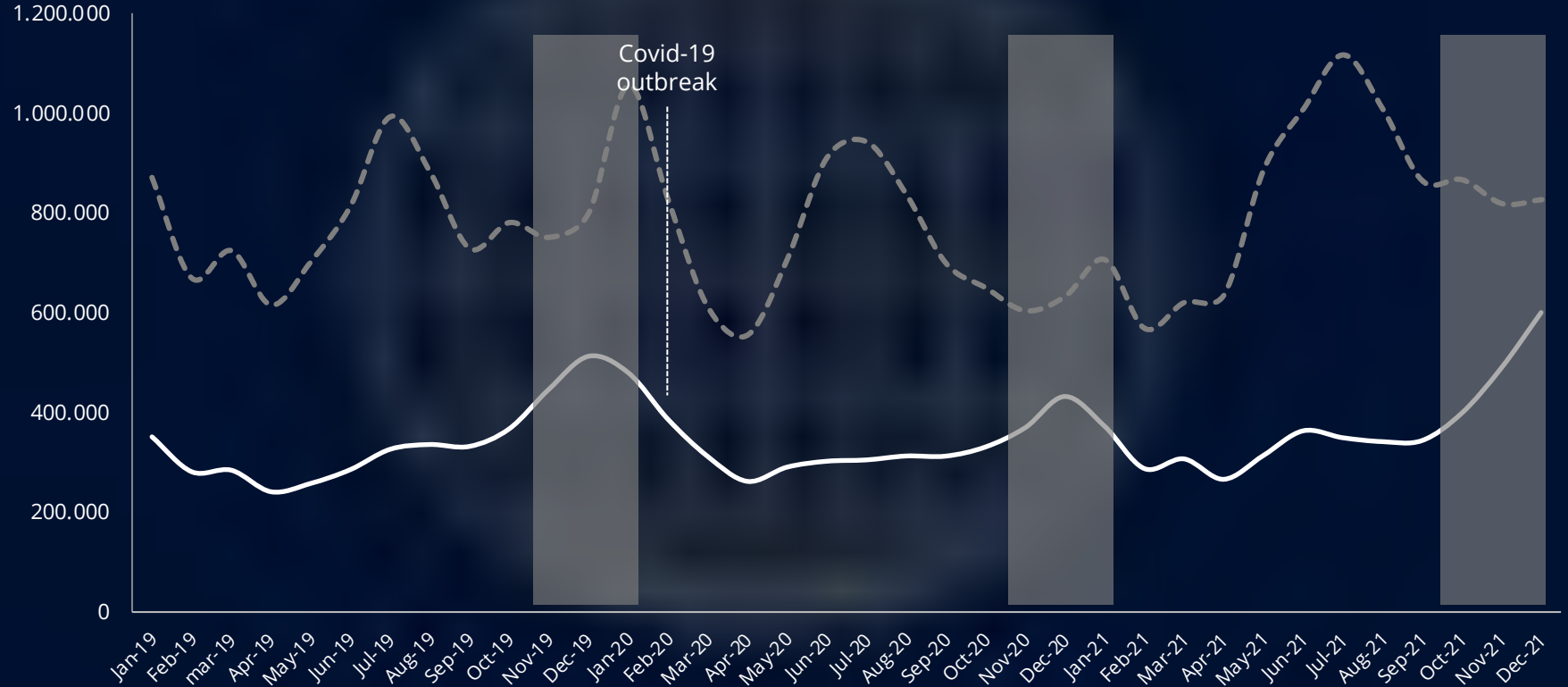
Finland has a Winter Seasonality

TM Rest of the world ■ Finland ■ AVG Competitors



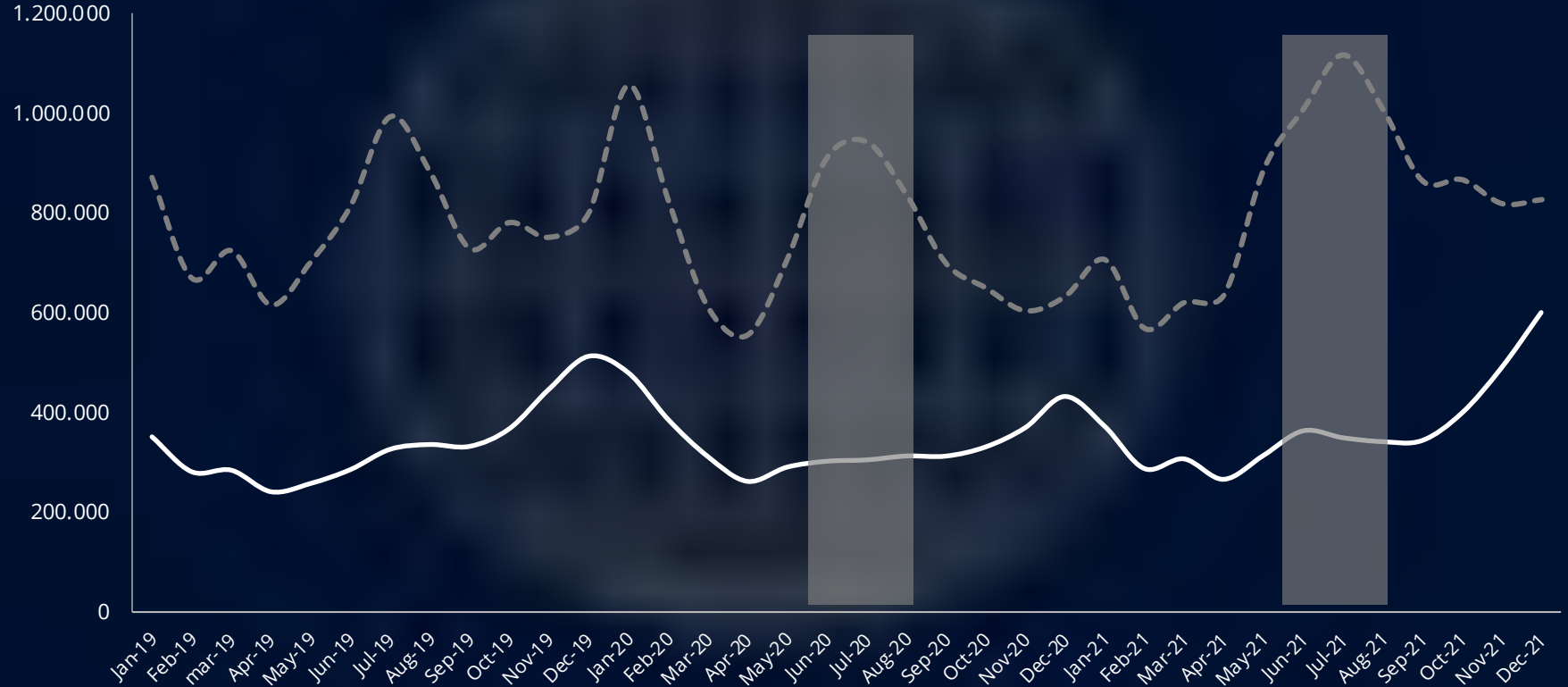
As well as its direct competitors

TM Rest of the world ■ Finland ■ AVG Competitors



As well as its direct competitors... that also have summer peaks

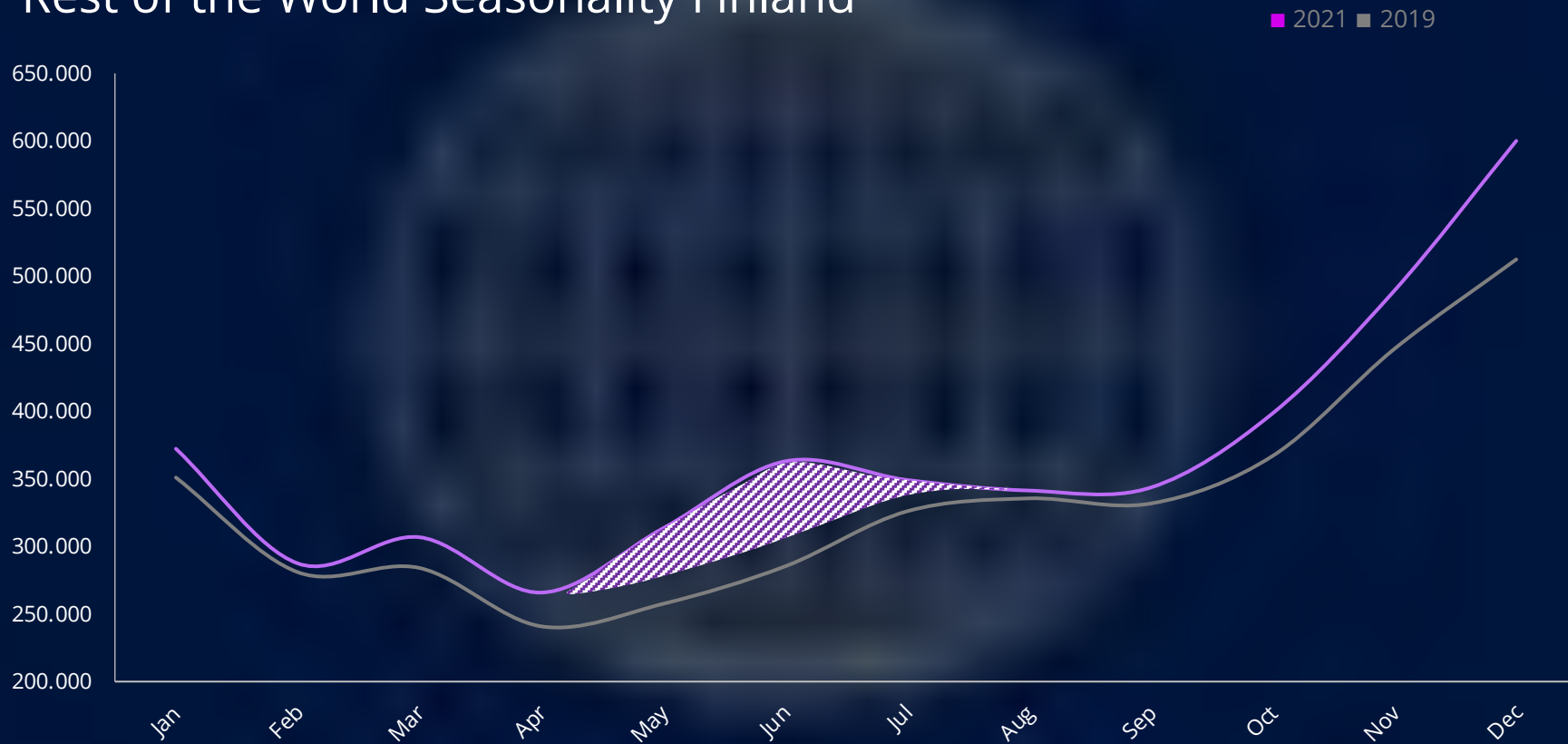
TM Rest of the world ■ Finland ■ AVG Competitors



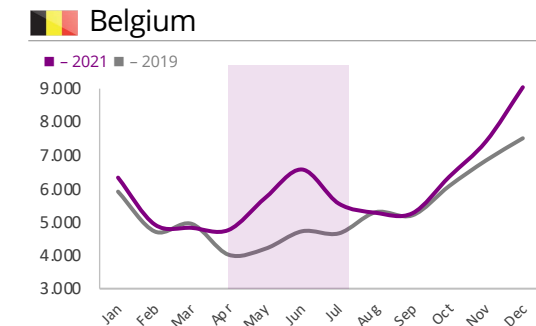
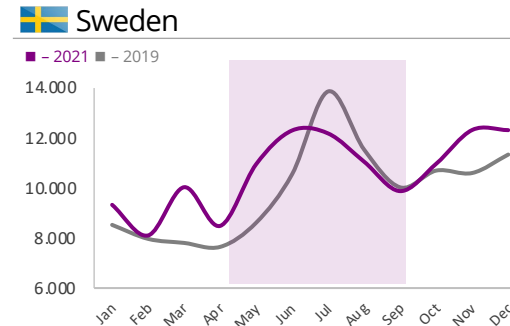
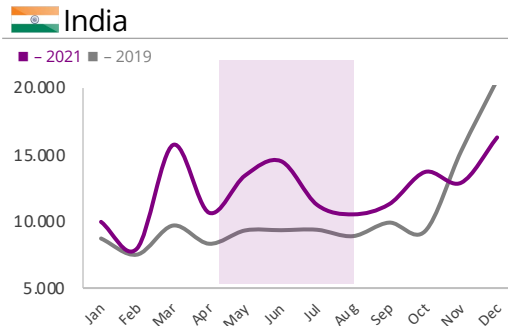
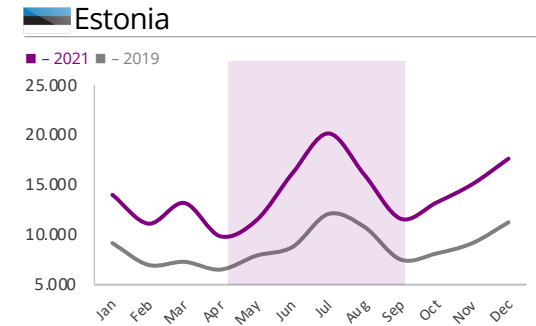
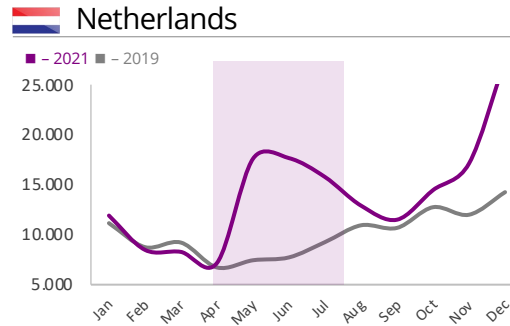
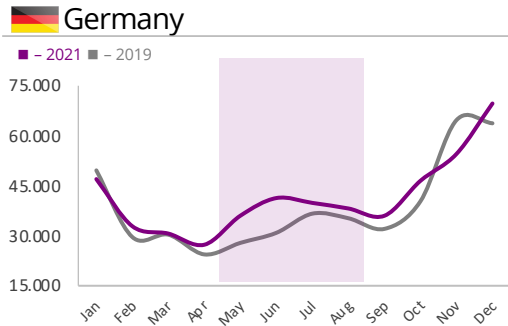
Rest of the World Seasonality Finland



Rest of the World Seasonality Finland



Markets which experience and increase in “summer” demand



Summer activities...

Camping



Lakes



Golf



Islands



Midnight Sun



Beaches



#Conclusion 4

The beginning of the
summer season trend?

Looks promising ...

#Conclusion 5

The domestic market
is here to stay?

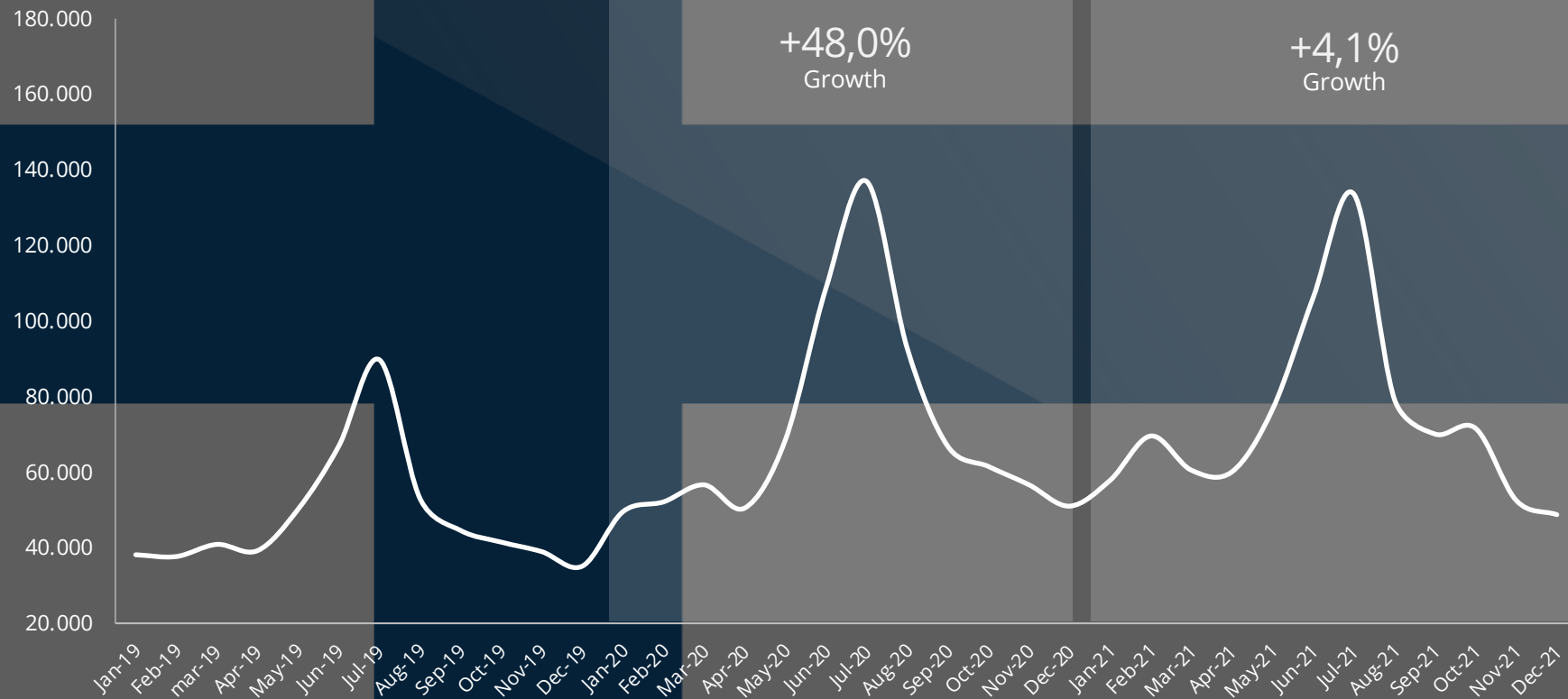
Finish domestic market

885

thousand searches in 2021

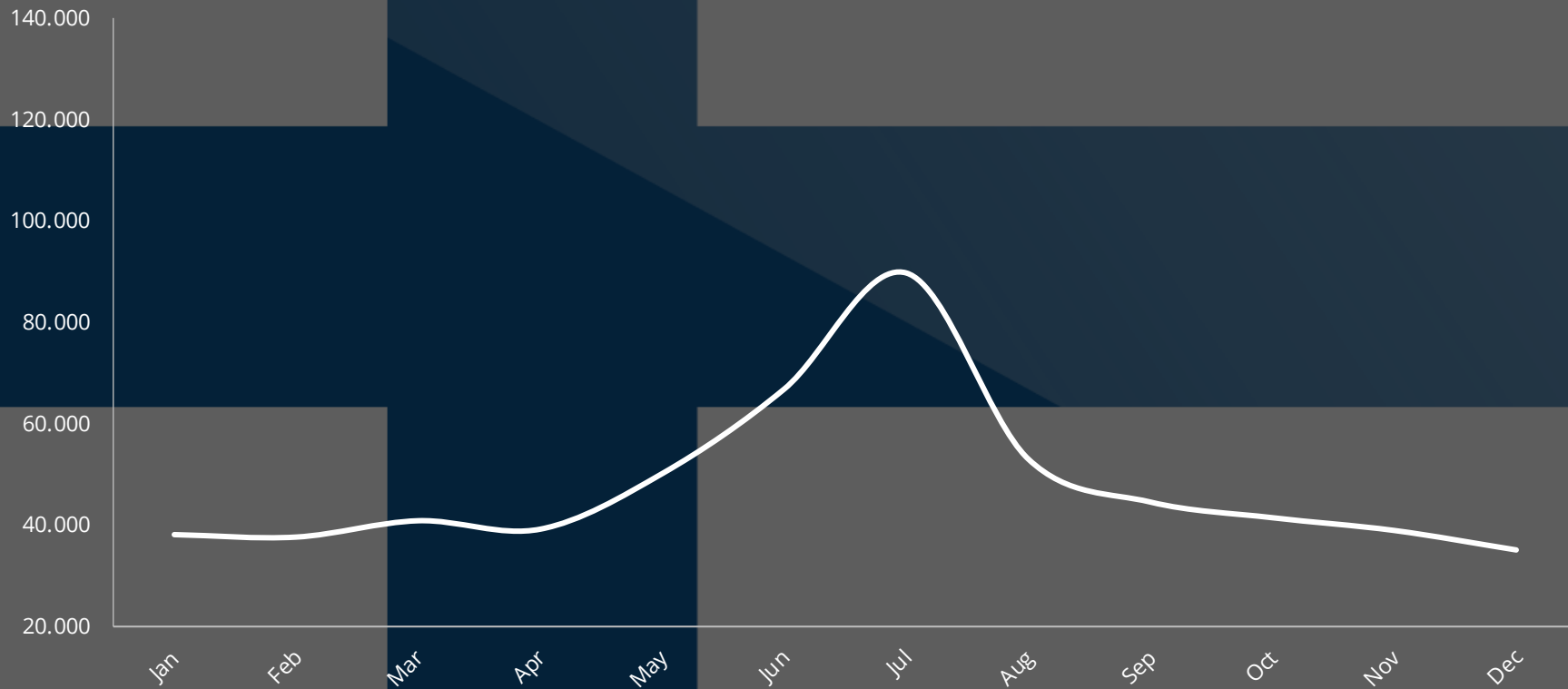
17% *of share global searches*

Finish domestic market is a “summer” market and it was growing



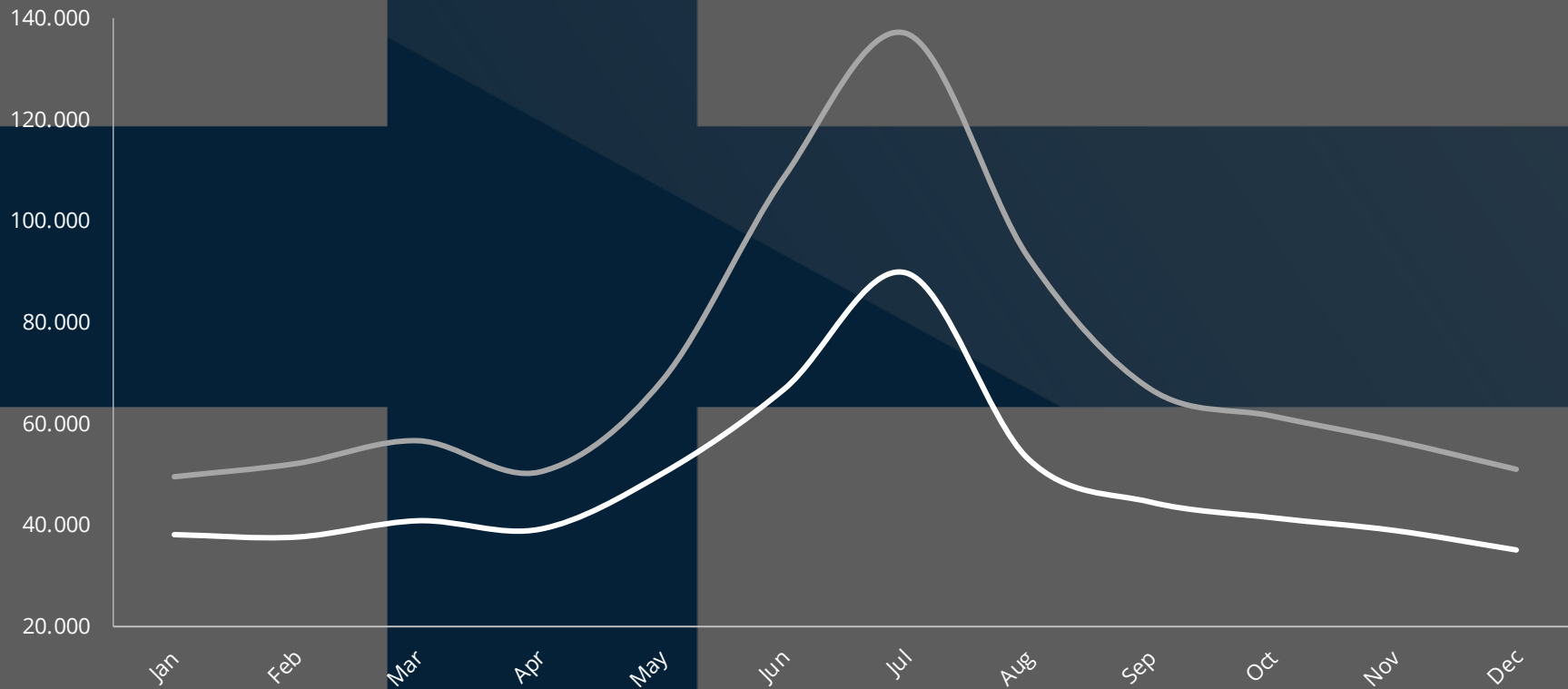
Domestic Seasonality Finland

2021 2020 2019



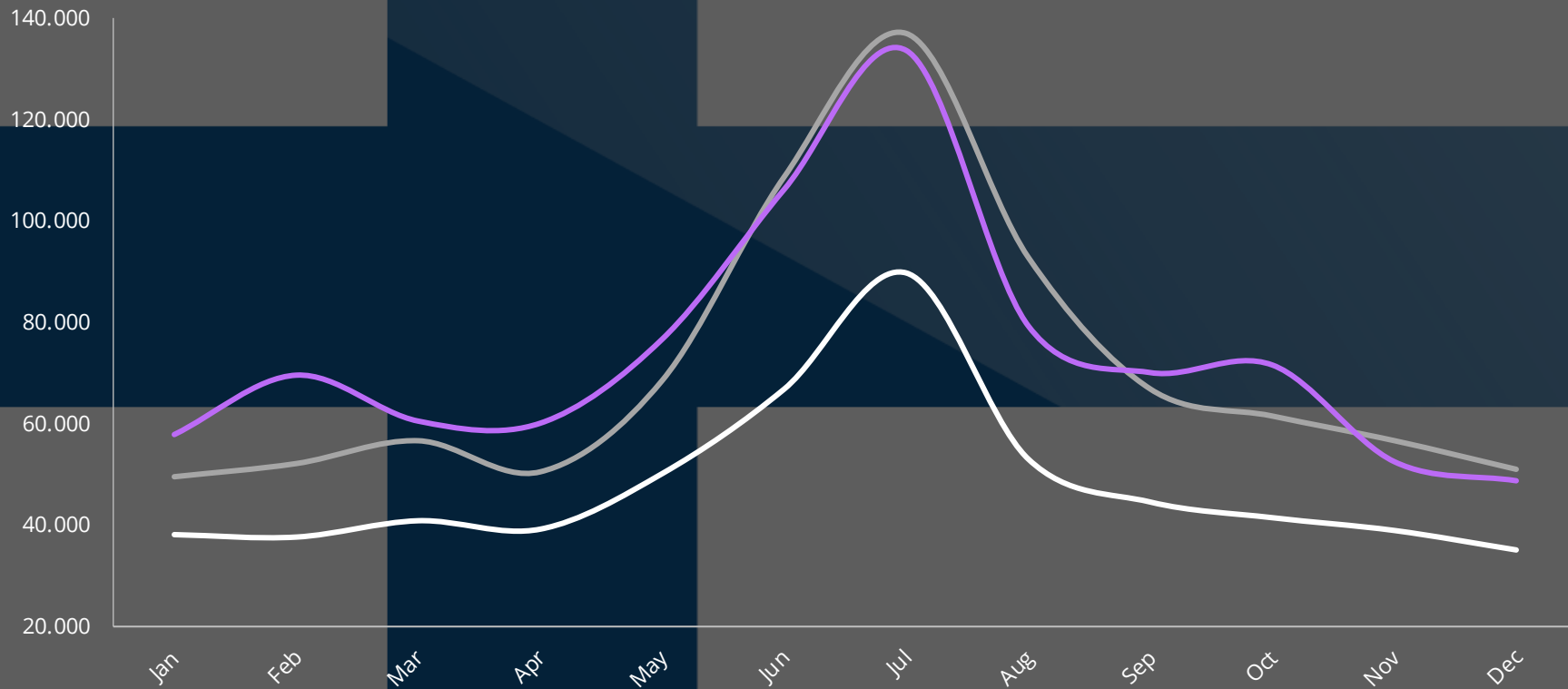
Domestic Seasonality Finland

2021 2020 2019



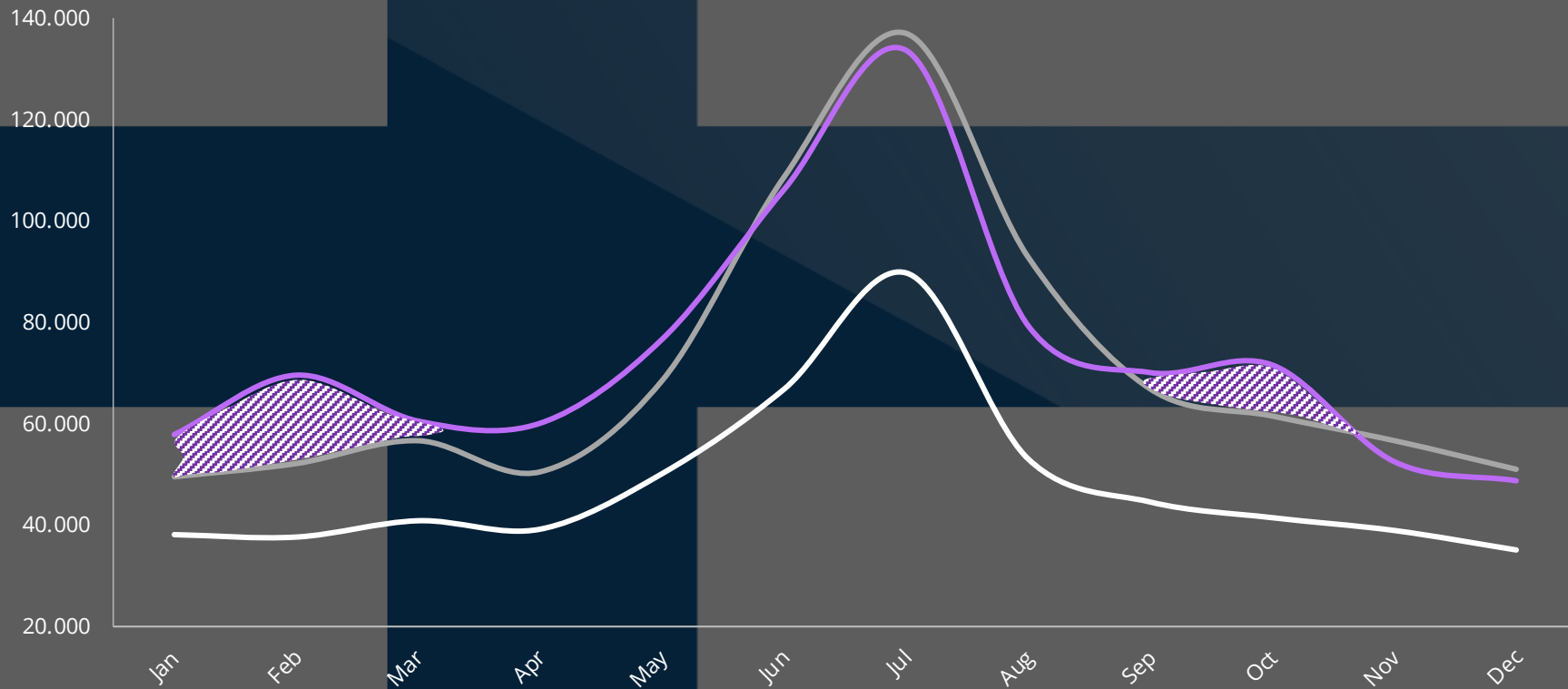
Domestic Seasonality Finland

■ 2021 ■ 2020 ■ 2019



Domestic Seasonality Finland

■ 2021 ■ 2020 ■ 2019



Domestic markets preferences

Main brandtags



Emerging brandtags



Finish market searches. Almost all the Micro-Brandtags grow over the last two years



Domestic

Top15 Micro-Brandtags - searches Jan – Dec 2021,
CAGR searches Jan - Dec 2019 vs 2021,

Micro-Brandtags	Searches
1. Cities	150K
2. National Parks	100K
3. Spa Resorts	71K
4. Travel Restrictions	47K
5. Lakes	43K
6. Camping	41K
7. Castles and Fortresses	30K
8. Spa Hotels	17K
9. Hotels	16K
10. Cycling	15K
11. Holiday Packages	14K
12. Golf	14K
13. Amusement Parks	12K
14. Islands	12K
15. Tourism	12K

Finish market searches. Almost all the Micro-Brandtags grow over the last two years



Domestic

Top15 Micro-Brandtags - searches Jan – Dec 2021,
CAGR searches Jan - Dec 2019 vs 2021,

Micro-Brandtags	Searches	Growth
1. Cities	150K	+27,1%
2. National Parks	100K	+42,4%
3. Spa Resorts	71K	+14,5%
4. Travel Restrictions	47K	+1406,8%
5. Lakes	43K	+17,5%
6. Camping	41K	+7,4%
7. Castles and Fortresses	30K	+20,8%
8. Spa Hotels	17K	+23,4%
9. Hotels	16K	+39,5%
10. Cycling	15K	+9,8%
11. Holiday Packages	14K	+34,5%
12. Golf	14K	+36,7%
13. Amusement Parks	12K	+20,1%
14. Islands	12K	+23,1%
15. Tourism	12K	+17,2%

Search behaviour of domestic and international market...



Domestic

Top15 Micro-Brandtags - searches Jan – Dec 2021,

Micro-Brandtags

1. Cities
2. National Parks
3. Spa Resorts
4. Travel Restrictions
5. Lakes
6. Camping
7. Castles and Fortresses
8. Spa Hotels
9. Hotels
10. Cycling
11. Holiday Packages
12. Golf
13. Amusement Parks
14. Islands
15. Tourism



International

Top15 Micro-Brandtags - searches Jan – Dec 2020,

Micro-Brandtags

1. Saunas
2. Cities
3. Travel
4. Northern Lights
5. Travel Restrictions
6. Glass Cabins
7. Tourism
8. Santa Claus
9. Places to Visit
10. Hotels
11. Lakes
12. Holiday Packages
13. Vacation Packages
14. Camping
15. Ice Hotels

Search behaviour of domestic and international market similarities



Domestic

Top15 Micro-Brandtags - searches Jan – Dec 2021,

Micro-Brandtags

- 1. Cities**
- National Parks
- Spa Resorts
- 4. Travel Restrictions**
- 5. Lakes**
- 6. Camping**
- Castles and Fortresses
- Spa Hotels
- 9. Hotels**
- Cycling
- 11. Holiday Packages**
- Golf
- Amusement Parks
- Islands
- 15. Tourism**



International

Top15 Micro-Brandtags - searches Jan – Dec 2020,

Micro-Brandtags

- Saunas
- 2. Cities**
- Travel
- Northern Lights
- 5. Travel Restrictions**
- Glass Cabins
- 7. Tourism**
- Santa Claus
- Places to Visit
- 10. Hotels**
- 11. Lakes**
- 12. Holiday Packages**
- Vacation Packages
- 14. Camping**
- Ice Hotels

Search behaviour of domestic and international market differences



Domestic

Top15 Micro-Brandtags - searches Jan – Dec 2021,

Micro-Brandtags

1. Cities
- 2. National Parks**
- 3. Spa Resorts**
4. Travel Restrictions
5. Lakes
6. Camping
- 7. Castles and Fortresses**
8. Spa Hotels
9. Hotels
- 10. Cycling**
11. Holiday Packages
- 12. Golf**
- 13. Amusement Parks**
- 14. Islands**
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International

Top15 Micro-Brandtags - searches Jan – Dec 2020,

Micro-Brandtags

- 1. Saunas**
2. Cities
3. Travel
- 4. Northern Lights**
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- 6. Glass Cabins**
7. Tourism
- 8. Santa Claus**
9. Places to Visit
10. Hotels
11. Lakes
12. Holiday Packages
13. Vacation Packages
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- 15. Ice Hotels**

#Conclusion 5

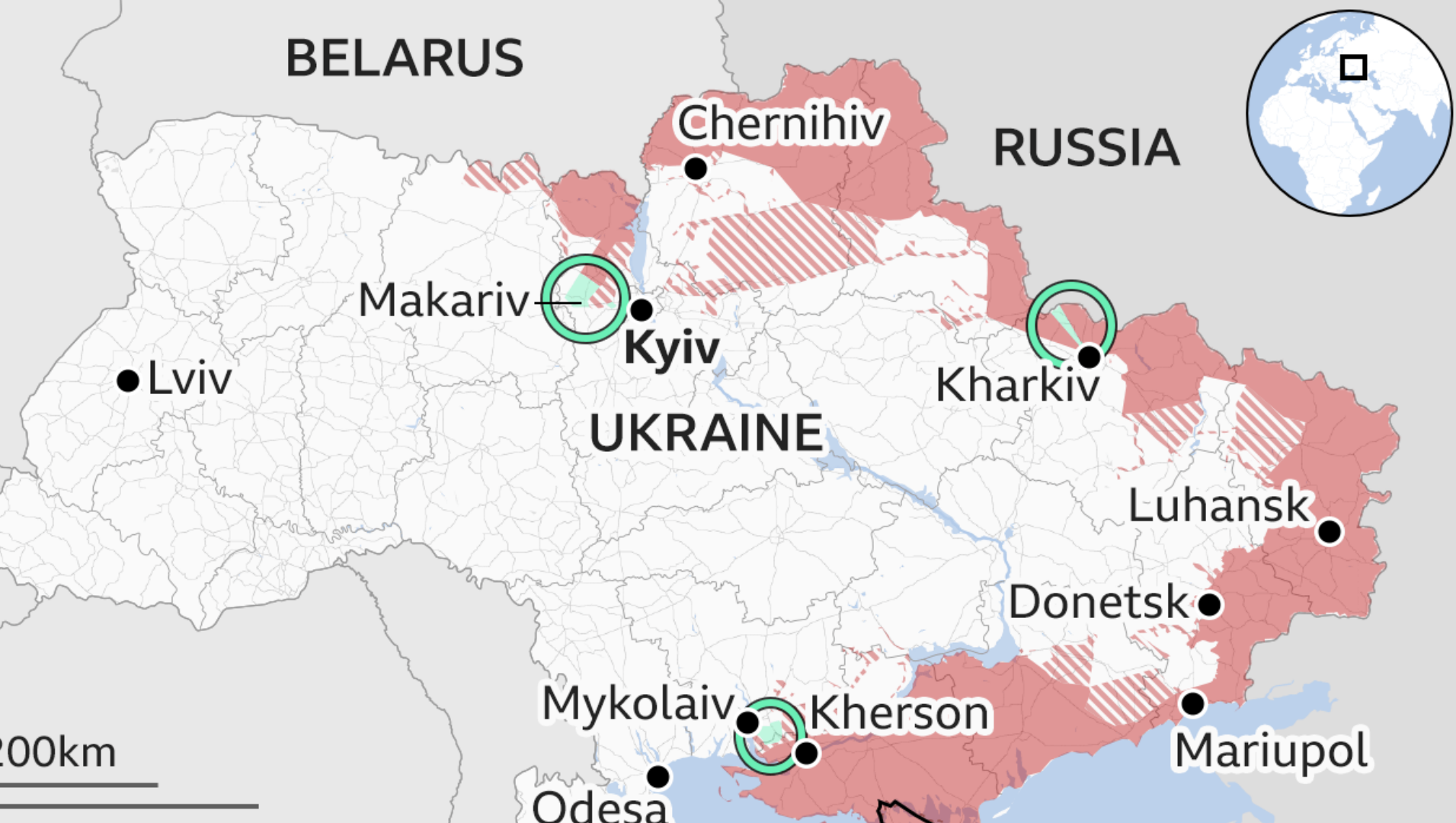
The domestic market is
here to stay?

The end of restrictions
will tell ...

Conclusions

1. New analysis framework: Russia, China and the rest of the world
2. There are different recovery speeds and levels depending on the market
3. Finland has a very strong and established “touristic” image
4. The beginning of the summer season trend?
Looks promising ...
5. The domestic market is here to stay?
The end of restrictions will tell ...

One last thing ...



We don't know how is going to impact the tourism industry the Ukraine invasion, yet too soon...

... what we know is that Visit Finland will have access to:

- Quarterly digital demand reports
- Special report on the impact of the Ukraine Invasion develop by Bloom Consulting

Thank you!

Gonzalo Vilar
Place Analytics director
gvilar@bloom-consulting.com

@bloomconsult

Olga Nowak
Place Analytics consultant
onowak@bloom-consulting.com