

# Finland Digital Demand results 2023

What's up seminar

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# Google



Google Search

I'm Feeling Lucky



**D2**  
Digital  
Demand

# Key findings 2023

# World outlook

**199.6m**  
Americas

**423.1m**  
Europe

**83.9m**  
Africa

**218.6m**  
Asia

**28.3m**  
Oceania

# World outlook

**+27,8%**  
Americas

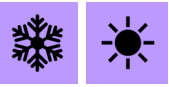
**+14,6%**  
Europe

**+12,6%**  
Nordics

**+34,9%**  
Africa

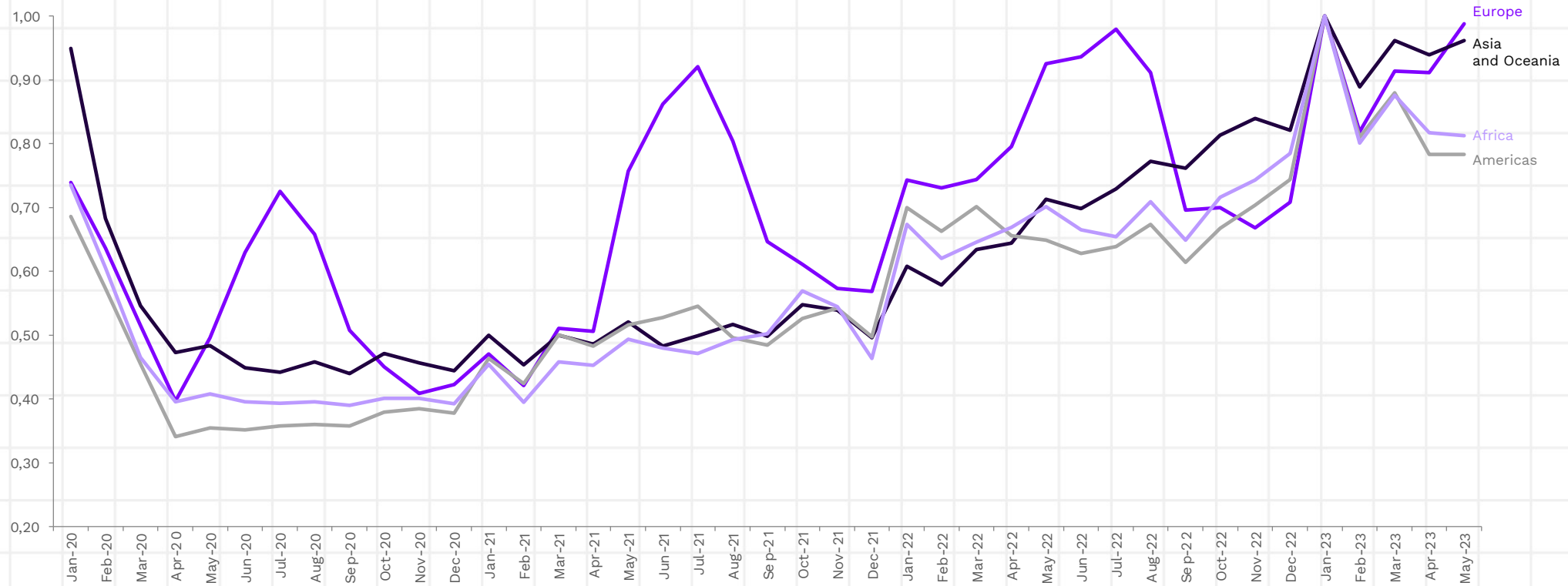
**+44,4%**  
Oceania

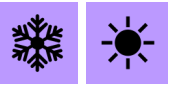
**+51,7%**  
Asia



# Continents seasonality of relative search interest

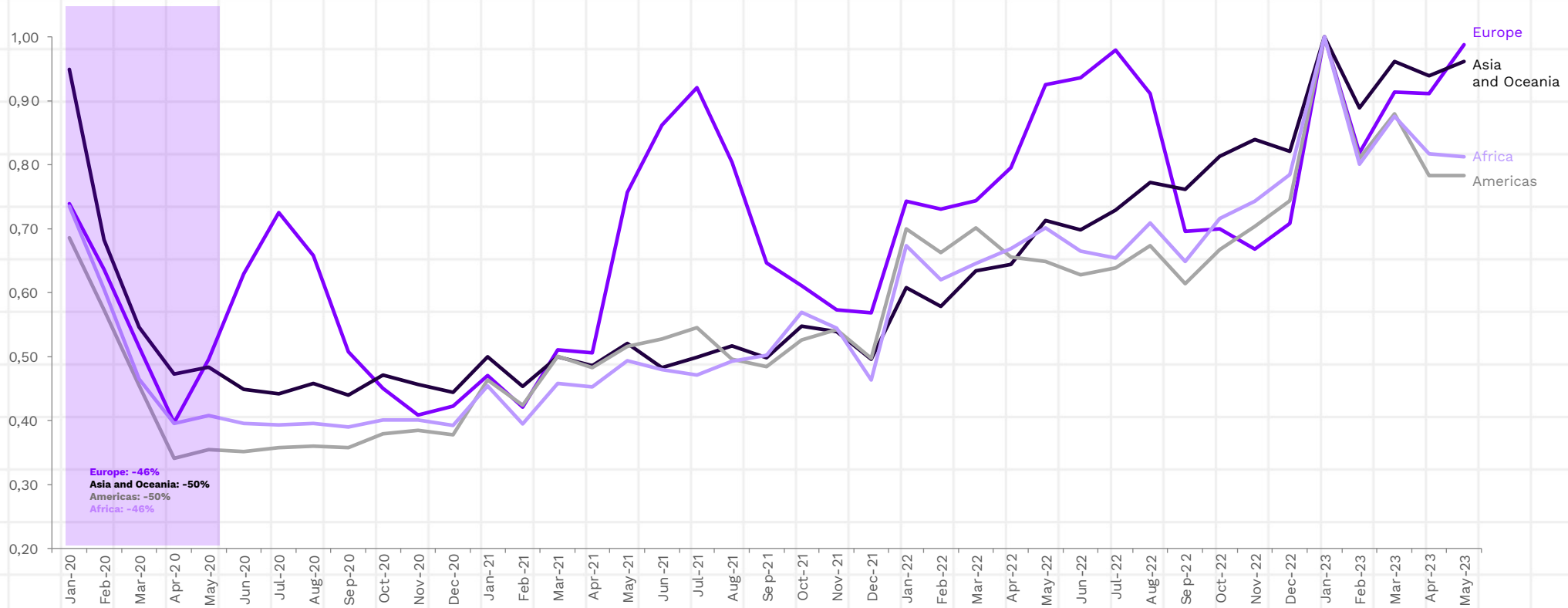
— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa



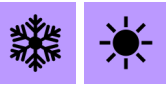


# Continents seasonality of relative search interest

— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa

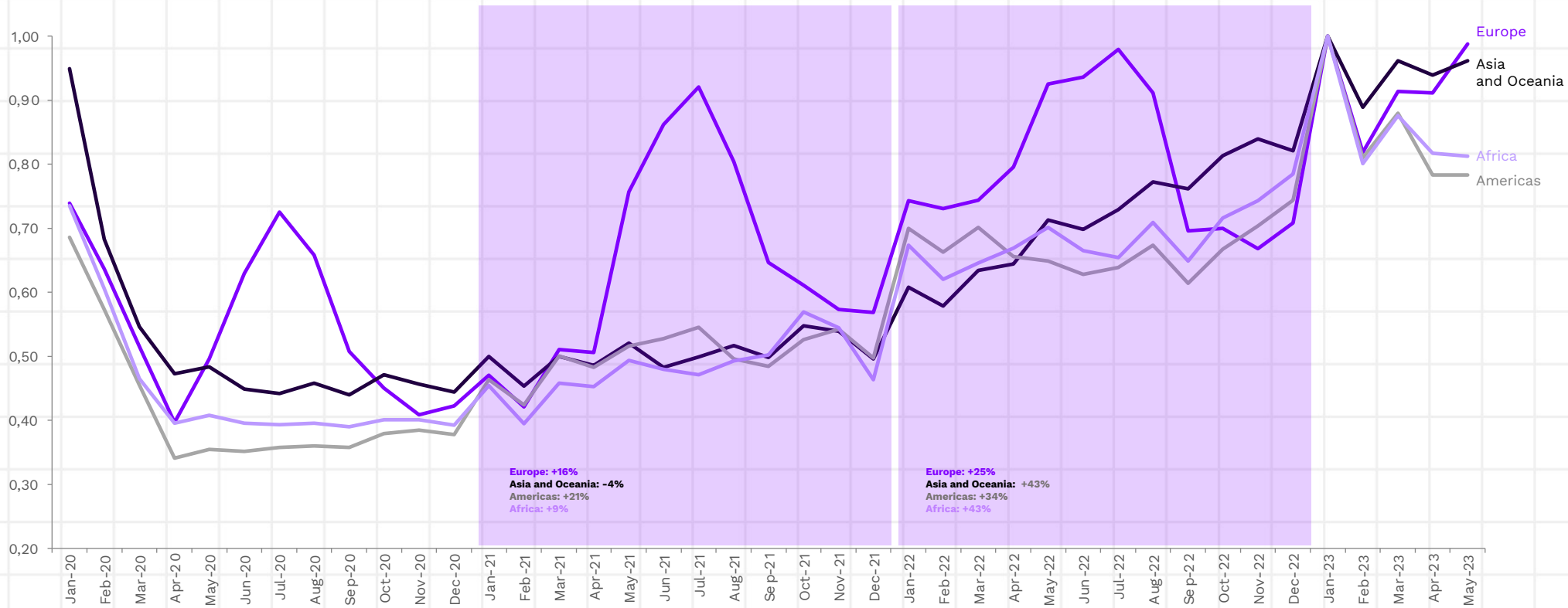






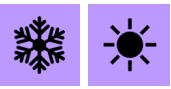
# Continents seasonality of relative search interest

— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa





Who is searching  
for Finland?

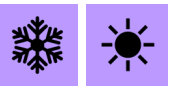


# Germany remains the top market of Finland, followed closely by Japan

## Search Volume and Growth for Finland's Target Markets

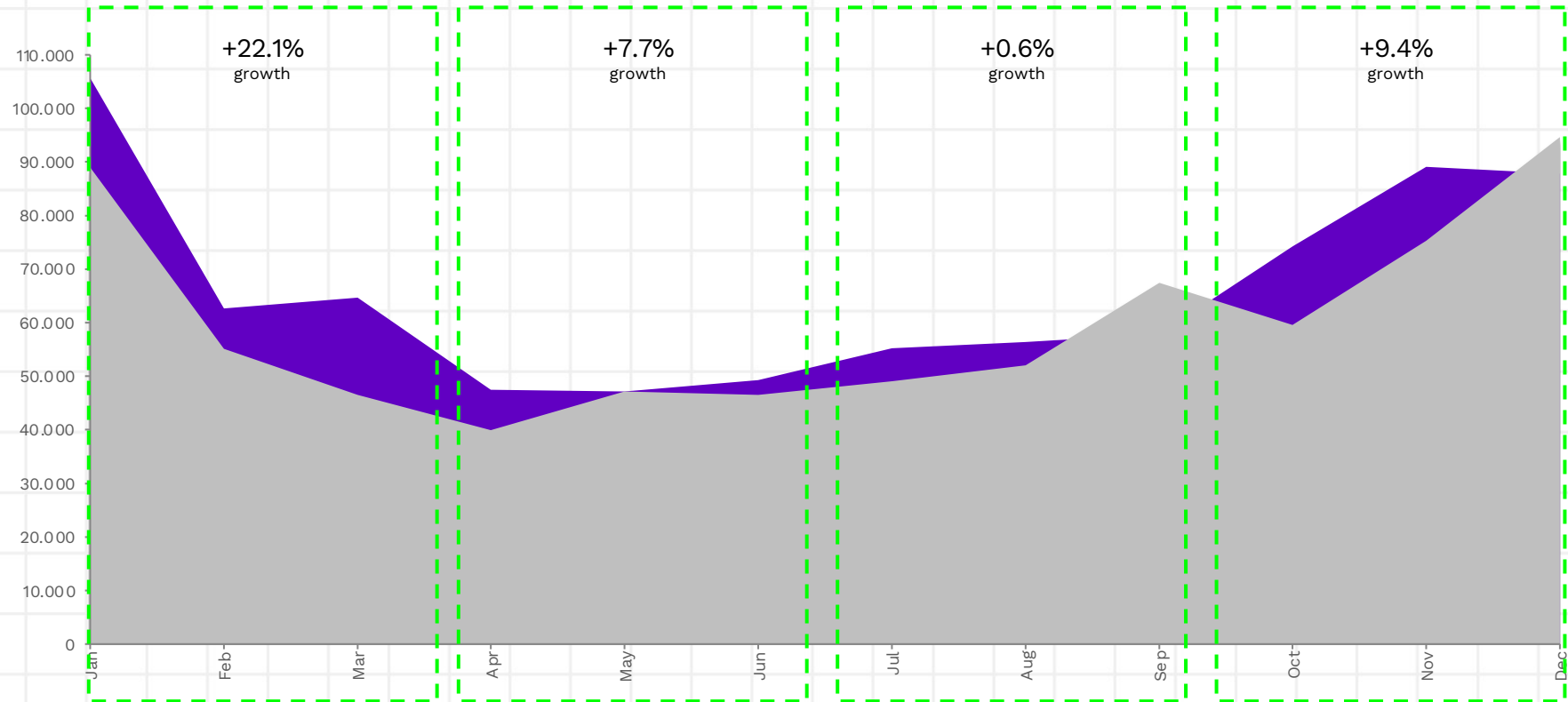
Searches: 2023 | Growth: 2023 vs 2022

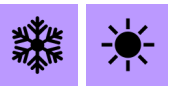
Rank	Flag	Target Market	Searches		Rank	Flag	Target Market	Searches
1		<b>Germany</b>	795K	Tier 1	10		<b>India</b>	200K
2		<b>Japan</b>	758K		11		<b>Netherlands</b>	195K
3		<b>United States</b>	653K		12		<b>Switzerland</b>	163K
4		<b>United Kingdom</b>	473K		13		<b>Canada</b>	156K
5		<b>France</b>	357K		14		<b>Australia</b>	136K
6		<b>Italy</b>	351K		15		<b>Austria</b>	122K
7		<b>Spain</b>	249K		16		<b>China</b>	104K
8		<b>Sweden</b>	226K		17		<b>Belgium</b>	93K
9		<b>Estonia</b>	204K		18		<b>South Korea</b>	70K



# Search volume by month for target market Germany

— Finland search volume market Germany 2023 vs 2022 





# The overall position of Germany is based on the strong performance in Q1 of 2023

## Search Volume and Growth for Finland's Target Markets

Searches for 2023

Rank	Flag	Target Market	Searches
1		<b>Germany</b>	795K
2		<b>Japan</b>	758K
3		<b>United States</b>	653K
4		<b>United Kingdom</b>	473K
5		<b>France</b>	357K
6		<b>Italy</b>	351K
7		<b>Spain</b>	249K
8		<b>Sweden</b>	226K
9		<b>Estonia</b>	204K



**Q1 2023**

Rank	Flag	Target Market
1		<b>Germany</b>
2		<b>United States</b>
3		<b>Japan</b>

**Q3 2023**

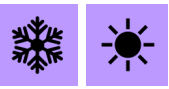
Rank	Flag	Target Market
1		<b>Japan</b>
2		<b>Germany</b>
3		<b>United States</b>

**Q2 2023**

Rank	Flag	Target Market
1		<b>Japan</b>
2		<b>United States</b>
3		<b>Germany</b>

**Q4 2023**

Rank	Flag	Target Market
1		<b>Japan</b>
2		<b>Germany</b>
3		<b>United States</b>



The overall position of Germany is based on the strong performance in Q1 of 2023, while Japan leads in other quarters

Search Volume and Growth for Finland's Target Markets

Searches for 2023

Rank	Flag	Target Market	Searches
1		Germany	795K
2		Japan	758K
3		United States	653K
4		United Kingdom	473K
5		France	357K
6		Italy	351K
7		Spain	249K
8		Sweden	226K
9		Estonia	204K



Rank	Flag	Target Market
1		Germany
2		United States
3		Japan

Q1 2023

Rank	Flag	Target Market
1		Japan
2		United States
3		Germany

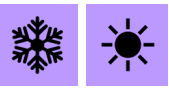
Q2 2023

Rank	Flag	Target Market
1		Japan
2		Germany
3		United States

Q3 2023

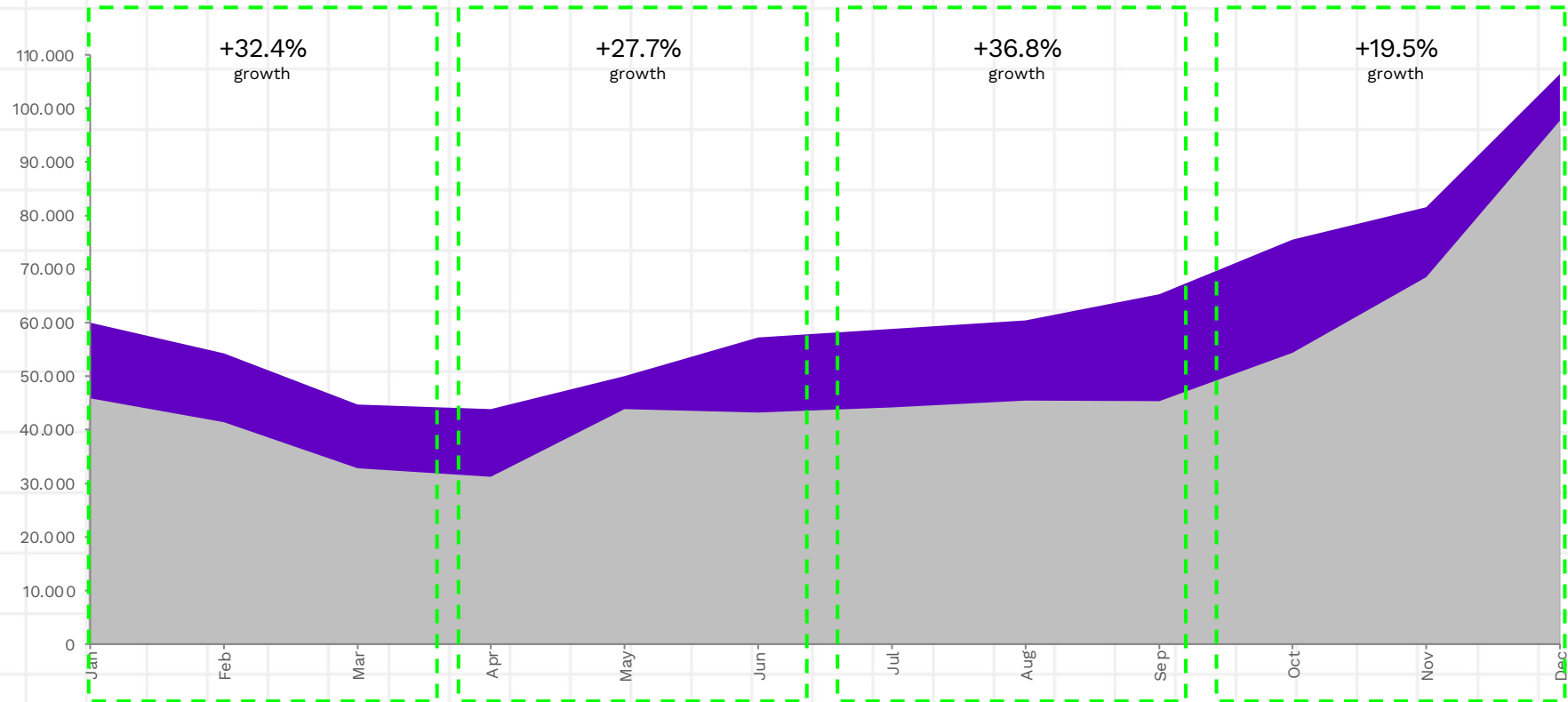
Rank	Flag	Target Market
1		Japan
2		Germany
3		United States

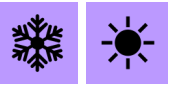
Q4 2023



# Search volume by month for target market Japan

— Finland search volume market Japan 2023 vs 2022

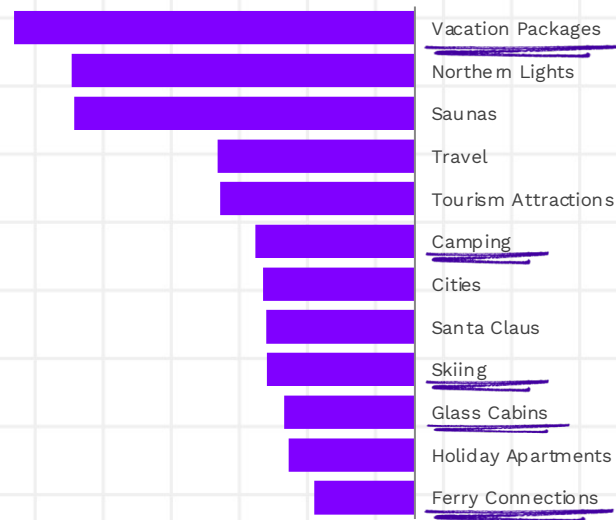





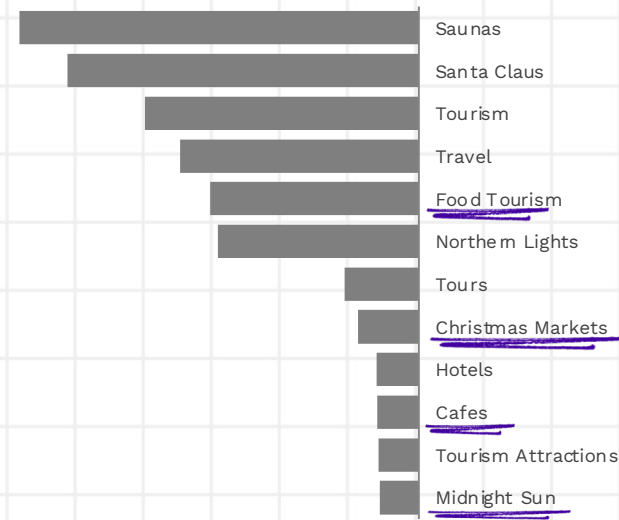
# Germans and Japanese are looking for a different offer in Finland

Top 12 Micro-Brandtags for Finland from markets Germany and Japan

■ TM Germany 2023 ■ TM Japan 2023

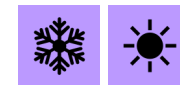


Germany 



Japan 





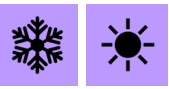
# Germany remains the top market of Finland, but the fastest-growing ones are the distant markets

## Search Volume and Growth for Finland's Target Markets

Searches: 2023 | Growth: 2023 vs 2022

Rank	Flag	Target Market	Searches	Growth
1		<b>Germany</b>	795K	+10.4%
2		<b>Japan</b>	758K	+27.7%
3		<b>United States</b>	653K	+19.9%
4		<b>United Kingdom</b>	473K	+12.5%
5		<b>France</b>	357K	+7.8%
6		<b>Italy</b>	351K	+7.3%
7		<b>Spain</b>	249K	+6.7%
8		<b>Sweden</b>	226K	+7.1%
9		<b>Estonia</b>	204K	+5.6%

Rank	Flag	Target Market	Searches	Growth
10		<b>India</b>	200K	+29.7%
11		<b>Netherlands</b>	195K	-6.2%
12		<b>Switzerland</b>	163K	+7.1%
13		<b>Canada</b>	156K	+9.3%
14		<b>Australia</b>	136K	+38.5%
15		<b>Austria</b>	122K	+11.5%
16		<b>China</b>	104K	+38.0%
17		<b>Belgium</b>	93K	+1.2%
18		<b>South Korea</b>	70K	+36.3%



# They grow across the majority of their top searched micro-brandtags

## Top 12 Micro-Brandtags for the fastest growing markets

Searches: January – December 2023

 Australia	 China	 South Korea	 India	 Japan	 United States
<b>Santa Claus</b> ▲	Tourism	Saunas	Cities	Saunas	Saunas
<b>Saunas</b> ▲	<b>Travel</b> ▲▲▲	<b>Travel</b> ▲▲	<b>Holiday Packages</b> ▲	Santa Claus	<b>Hotels</b> ▲▲
<b>Travel</b> ▲▲▲	Skiing	<b>Northern Lights</b> ▲▲	<b>Places to Visit</b> ▲	<b>Tourism</b> ▲▲	Cities
<b>Holiday Packages</b> ▲▲▲	Sledding	<b>Places to Visit</b> ▲▲	<b>Hotels</b> ▲▲	<b>Travel</b> ▲▲▲	<b>Santa Claus</b> ▲
Places to Visit	<b>Shopping</b> ▲▲▲	<b>Hotels</b> ▲▲▲	<b>Visit</b> ▲	<b>Food Tourism</b> ▲	Places to Visit
<b>Tours</b> ▲▲	<b>Saunas</b> ▲	<b>Glass Cabins</b> ▲▲▲	Saunas	Northern Lights	Restaurants
Cities	Santa Claus	<b>Happiness Index</b> ▲▲	<b>Travel</b> ▲▲	<b>Tours</b> ▲▲▲	<b>Tourism</b> ▲▲▲
<b>Ice Hotels</b> ▲	<b>Holiday Packages</b> ▲	Santa Claus	<b>Santa Claus</b> ▲▲	<b>Christmas Markets</b> ▲	<b>Travel</b> ▲
<b>Hotels</b> ▲▲	<b>Hotels</b> ▲▲	<b>Midnight Sun</b> ▲▲	<b>Tourism</b> ▲▲▲	<b>Hotels</b> ▲▲	Ice Hotels
<b>Skiing</b> ▲▲	<b>Museums</b> ▲▲	Lakes	<b>Tours</b> ▲	Cafes	Glass Cabins

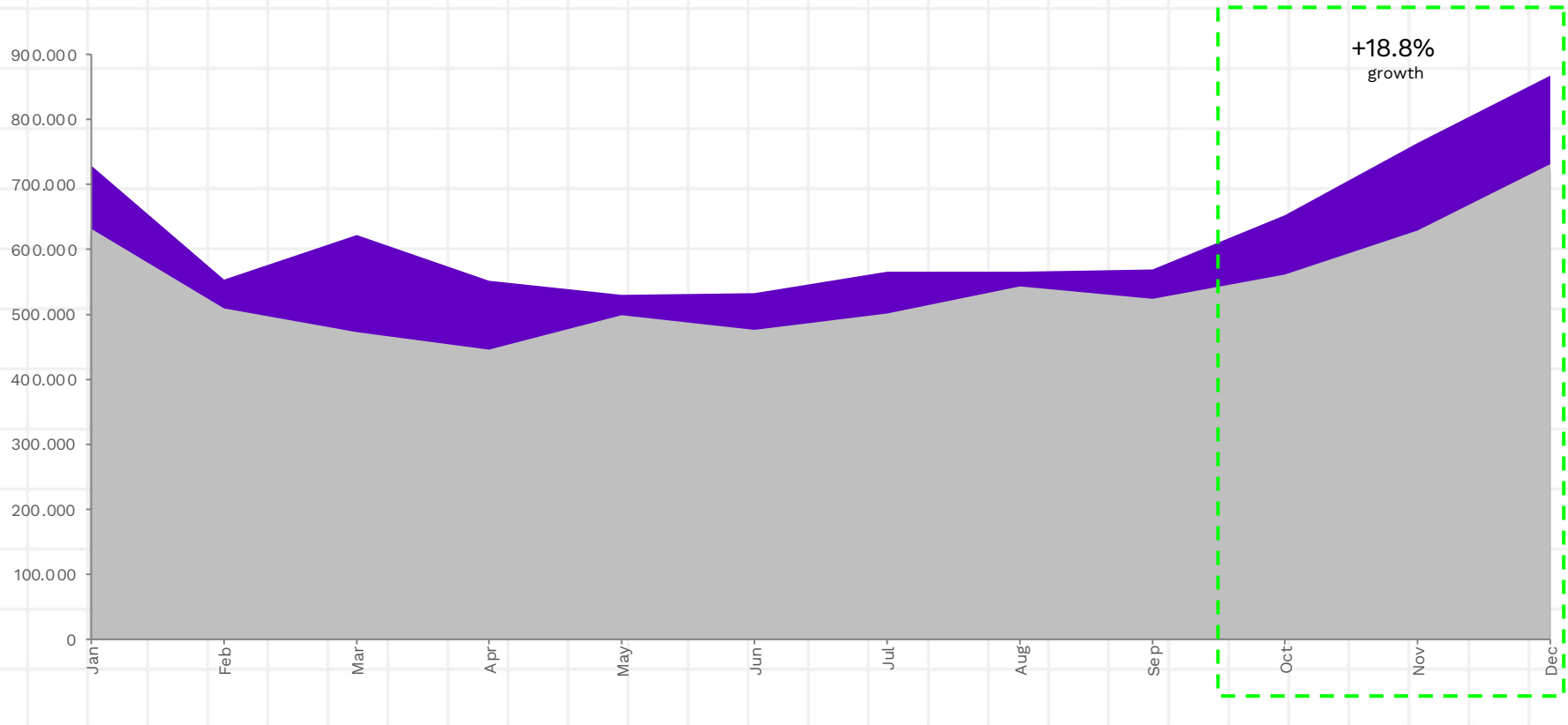


Let's focus  
on Finnish winter



# Finnish winter with an exceptional performance once again

— Finland search volume international 2023 vs 2022





What are the top searched themes in winter for Finland?



**Santa Claus**



**Saunas**



**Northern Lights**



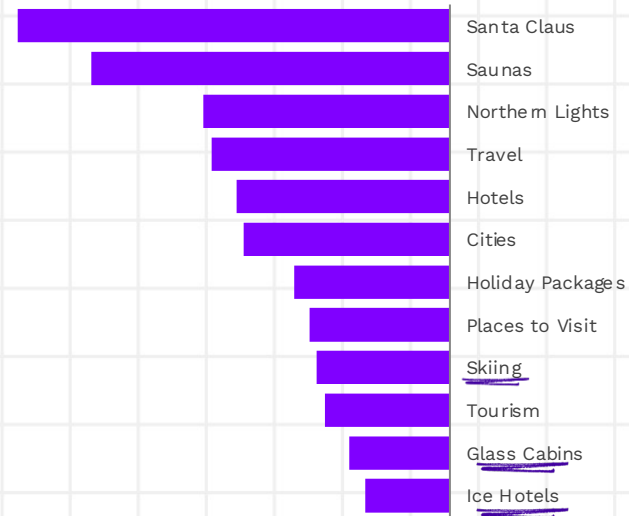
**Cities**



# Top Micro-Brandtags for Finland in Q4 2023

Top 12 Micro-Brandtags internationally for Finland

■ Q4 2023



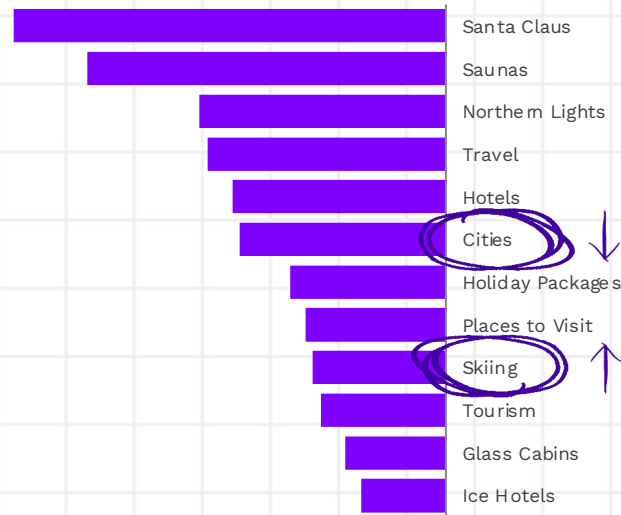
Q4 2023



# With Cities decreasing and Skiing going up

Top 12 Micro-Brandtags internationally for Finland

■ Q4 2023 ■ Q4 2022



Q4 2023



Q4 2022





# Other winter related Micro-Brandtags for Finland that continue to grow

## Emerging Micro-Brandtags for Finland

Searches: Q4 2023 | Growth: Q4 2023 vs Q3 2022



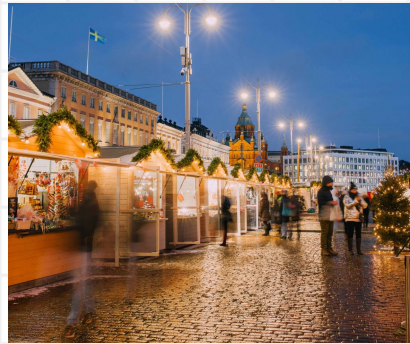
**Reindeers**

23.4K searches  
+16.0% growth



**Museums**

22.6K searches  
+66.3% growth



**Christmas Markets**

22.1K searches  
+39.6% growth



**Ski Resorts**

14.8K searches  
+43.7% growth



# Top Target Markets by search volume and growth for Finland

## Search Volume and Growth for Finland's Target Markets

Searches: Q4 2023 | Growth: Q4 2023 vs Q4 2022



#1



#2



#3

Main markets



+95.6%



+42.1%



+19.4%



+25.3%



+26.1%



+20.2%



+23.9%

Fastest growing markets



+2.7%



+3.1%

Slowest growing markets

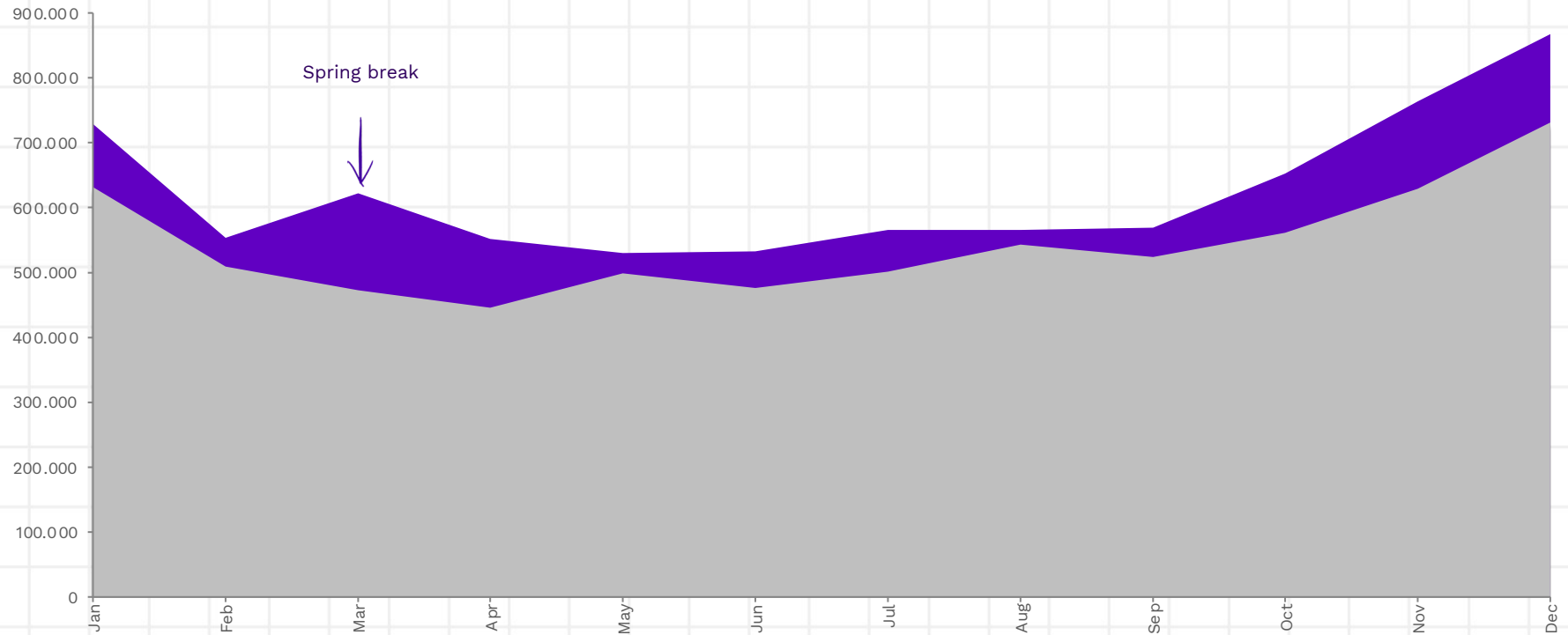


High season does not finish  
with the end of December



# Search volume by month for Finland

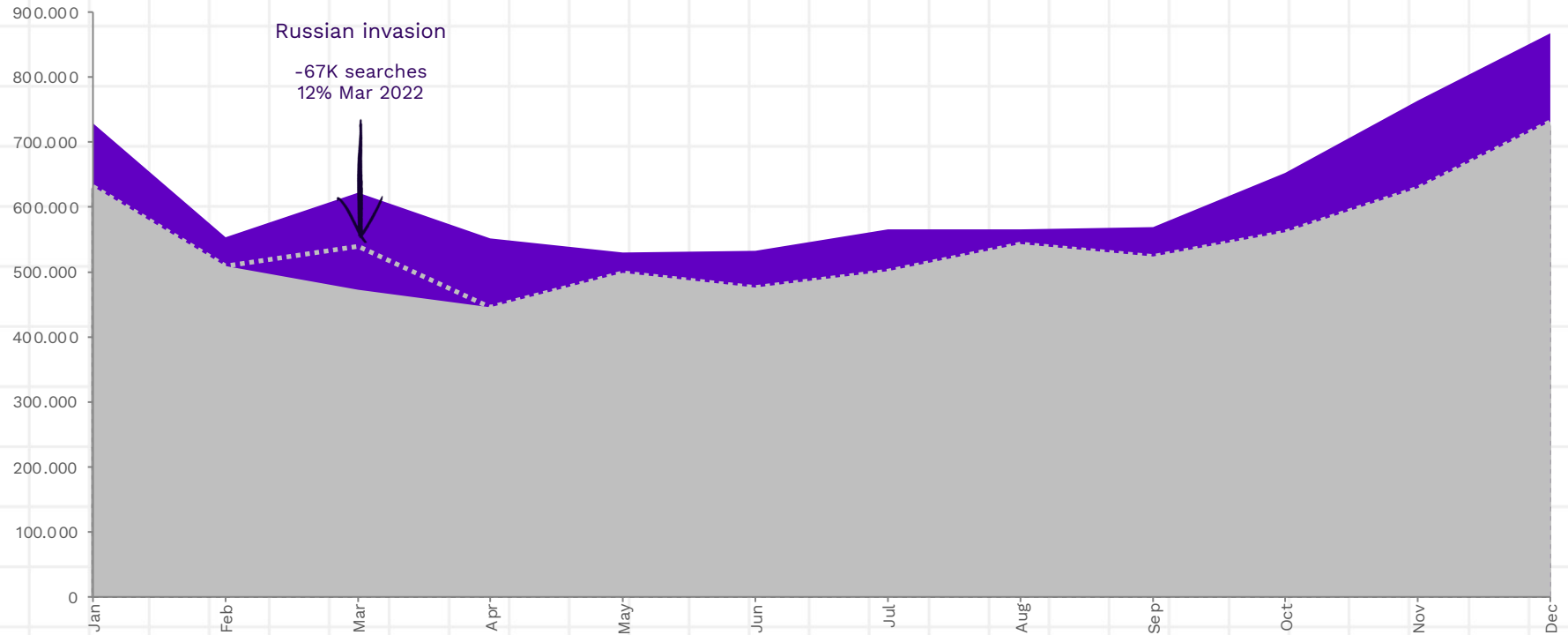
— Finland search volume 2023 vs 2022





# Search volume by month for Finland

— Finland search volume 2023 vs 2022





# Search volume by month for Finland

## Top 12 Micro-Brandtags internationally for Finland

■ Q1 2023



Q1 2023



# Australia and India as the fastest growing markets, while the search volume for the Netherlands has dropped dramatically

## Search Volume and Growth for Finland's Target Markets

Searches: Q1 2023 | Growth: Q1 2023 vs Q1 2022



#1



#2



#3

Main markets



+63.8%



+43.8%



+32.4%



+29.4%



+26.8%



+25.2%



+22.3%

Fastest growing markets



-4.1%



-6.6%



-22.3%

Markets with negative growth



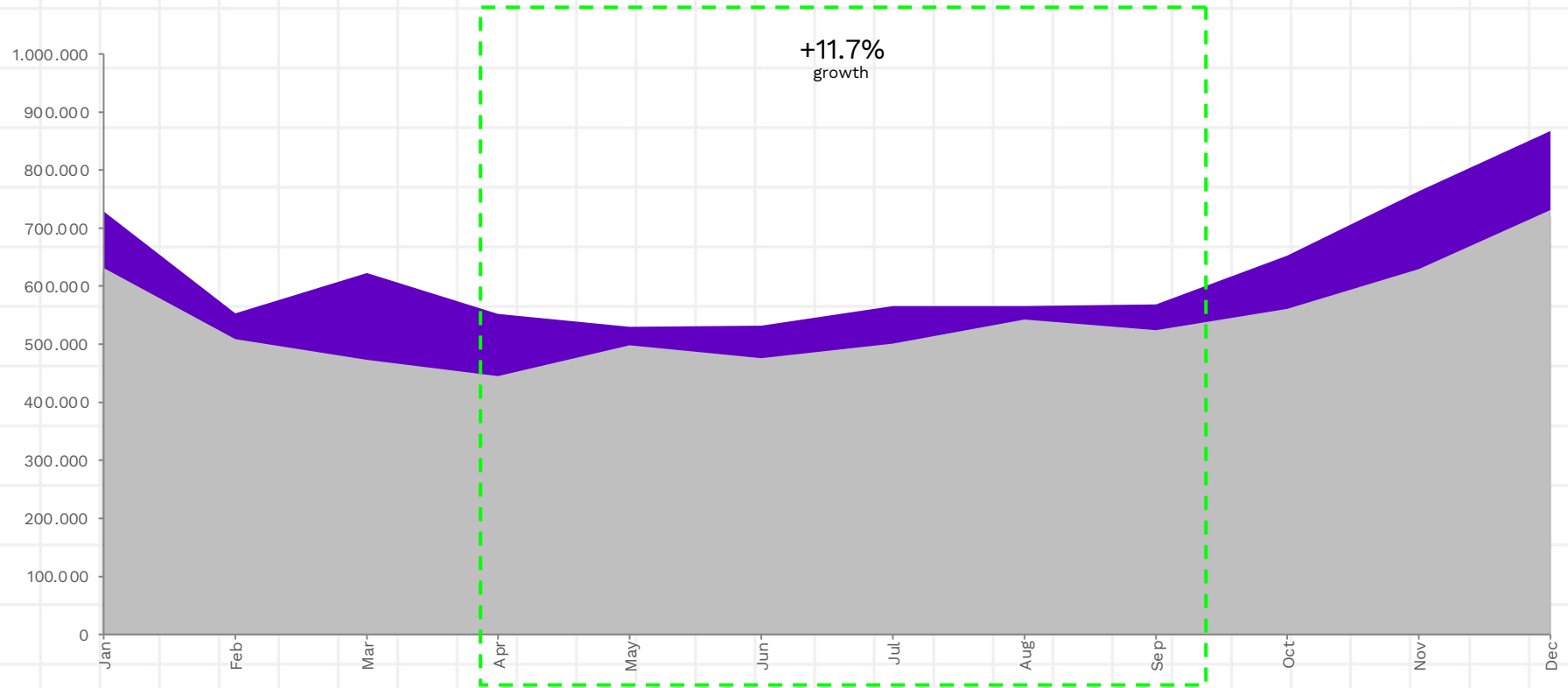
Searches for spring and summer in  
Finland continue to grow organically





# Searches for spring and summer in Finland grow organically

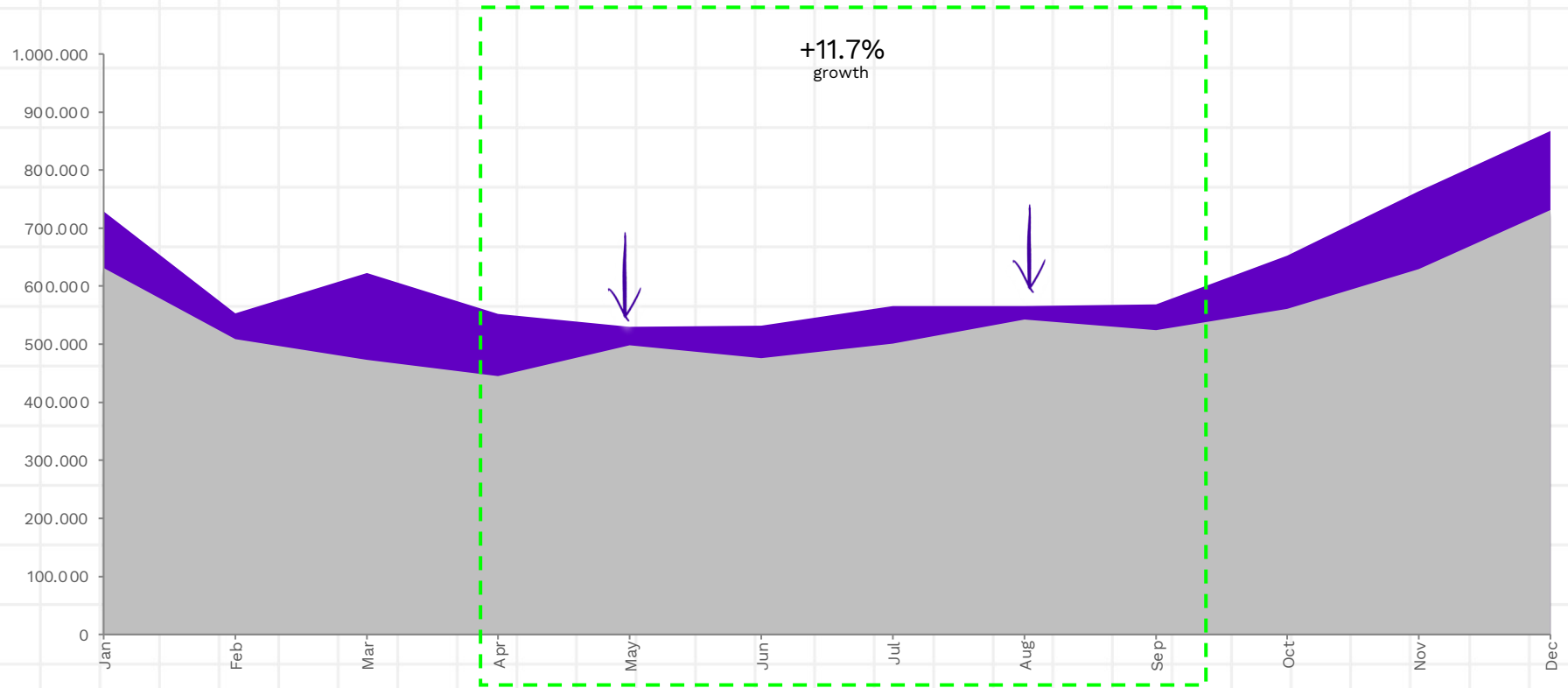
— Finland search volume international 2023 vs 2022





# However, the trend is different than the last year...

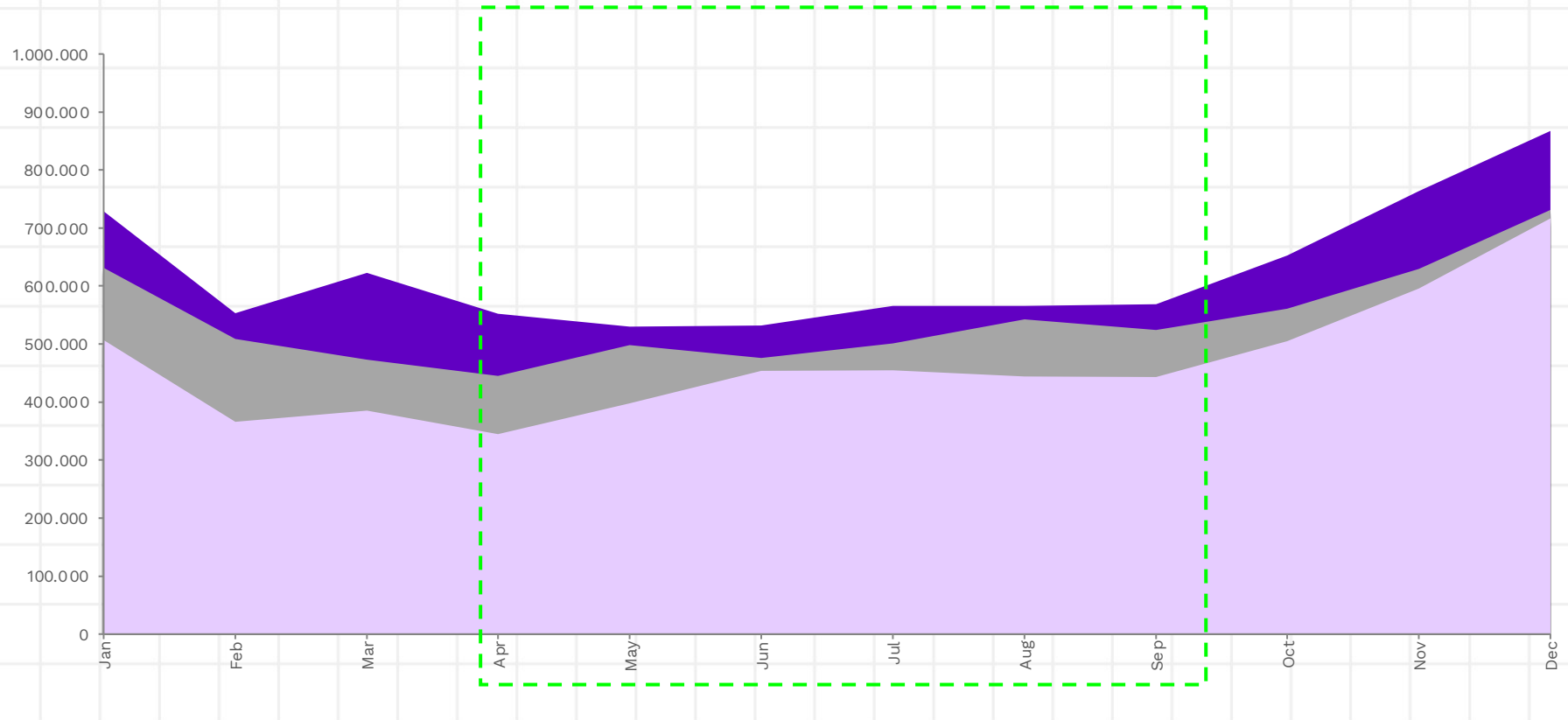
— Finland search volume international 2023 vs 2022





# ... following more the one from 2021

— Finland search volume 2023 vs 2022 vs 2021





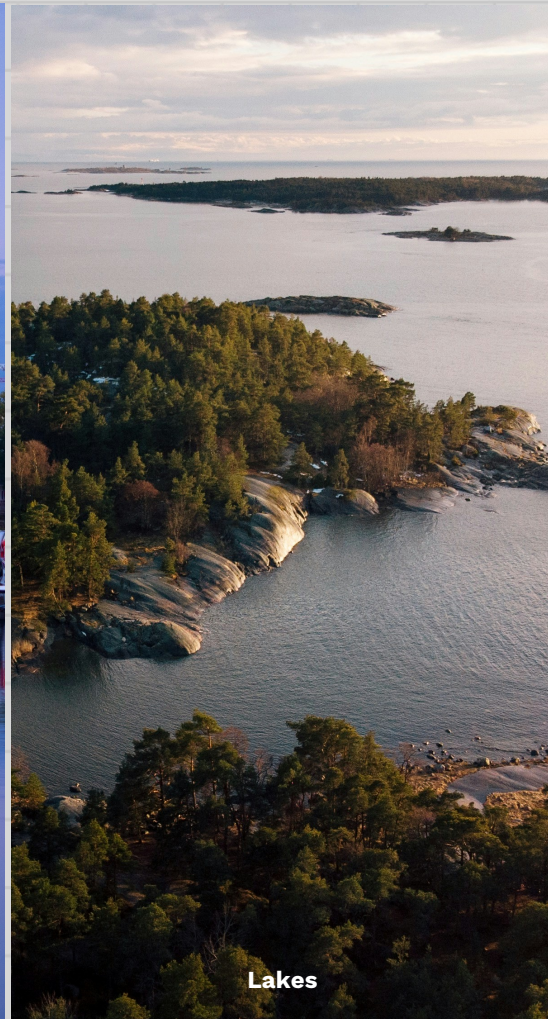
What are the top searched activities in spring and summer for Finland?



Saunas



Cities



Lakes



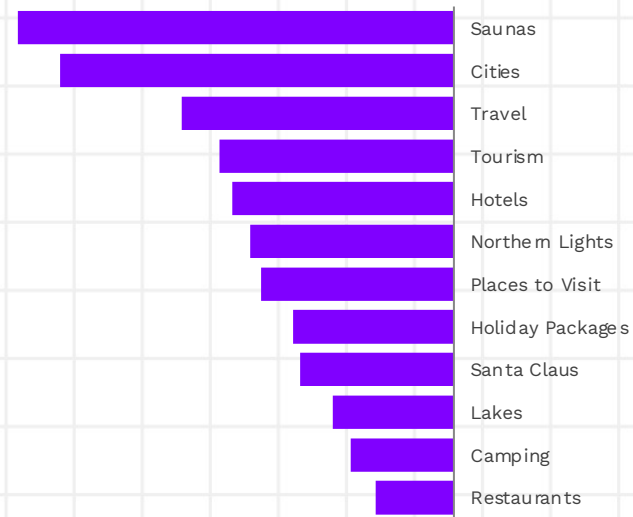
Camping



# Top Micro-Brandtags for Finland in Q2 2023 and Q3 2023

Top 12 Micro-Brandtags internationally for Finland

■ Q2 and Q3 2023



Q2 and Q3 2023



# Hotels and Restaurants are improving their positions, while Vacation Packages are down

Top 12 Micro-Brandtags internationally for Finland

■ Q2 and Q3 2023 ■ Q2 and Q3 2022





# Other spring and summer related activities for Finland

## Emerging Micro-Brandtags for Finland

Searches: Q2 and Q3 2023 | Growth: Q2 and Q3 2023 vs Q2 and Q3 2022



**Restaurants**

97.8K searches  
+31.6% growth



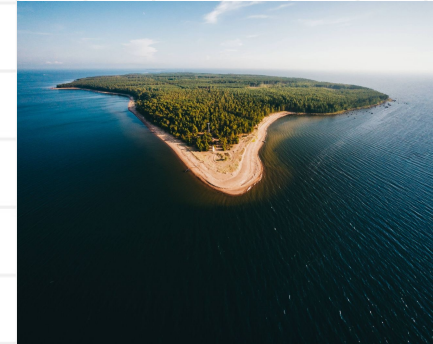
**Museums**

84.4K searches  
+49.1% growth



**National Parks**

83.9K searches  
+4.2% growth



**Islands**

66.5K searches  
+1.8% growth





# Australia and South Korea grow the most, while Belgium and the Netherlands maintain stable

## Search Volume and Growth for Finland's Target Markets

Searches: Q2 and Q3 2023 | Growth: Q2 2023 and Q3 2023 vs Q2 2022 and Q3 2022



#1



#2



#3

Main markets



+37.8%



+37.0%



+32.6%



+30.2%



+28.7%

Fastest growing markets



+0.3%



-3.6%

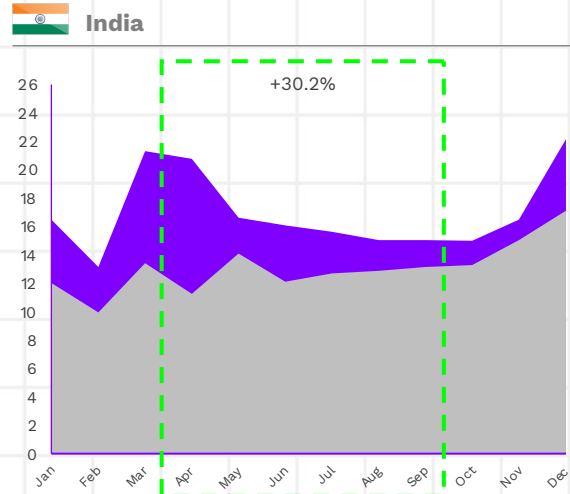
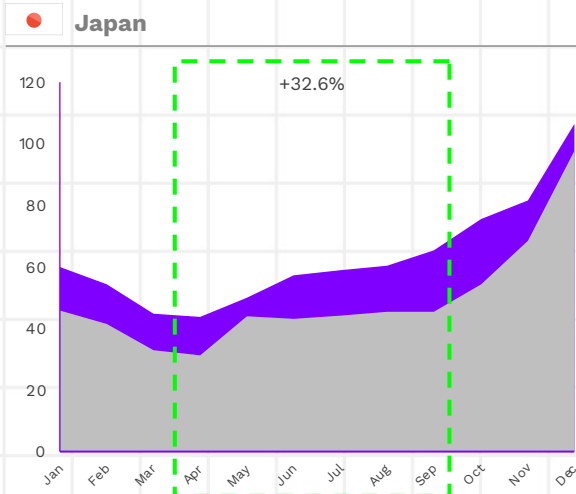
Slowest growing markets



# Japan and India grow organically across all the months...

International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands

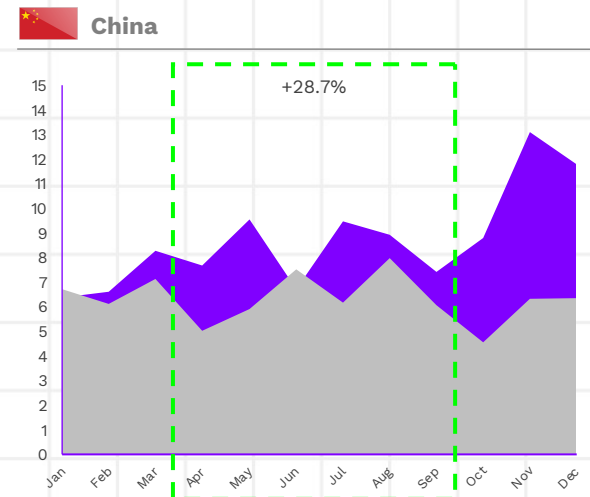
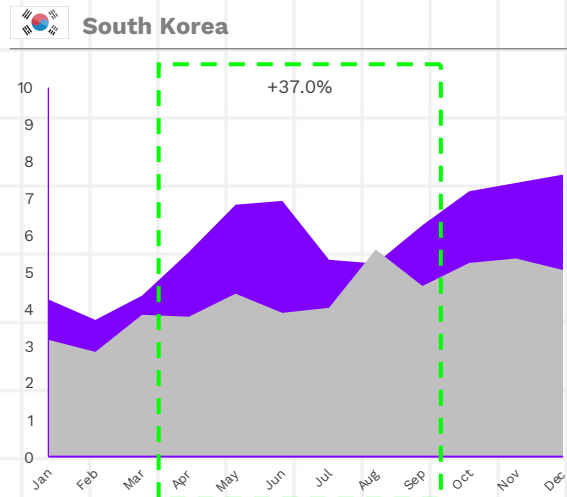
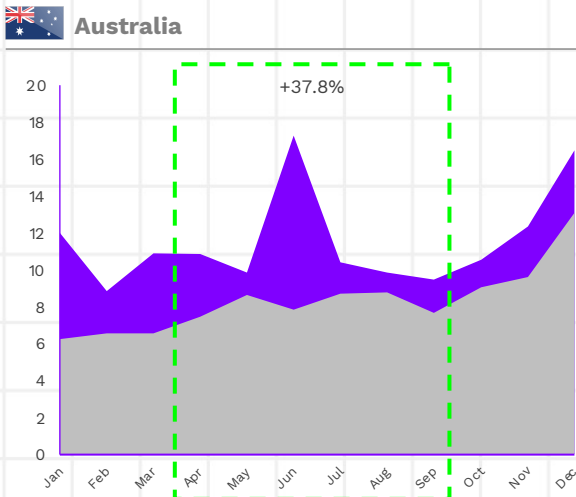




...while Australia, South Korea, and China show a less consistent increase in searches over the months

International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands





# Where each of the five most growing markets in summer has its own behaviour

## Top Micro-Brandtags for Target Markets of Finland

Order based on the searches Q2 and Q3 2023

 <b>Japan</b>	 <b>India</b>	 <b>Australia</b>	 <b>China</b>	 <b>South Korea</b>
1. Saunas	1. Holiday Packages	1. Saunas	1. Tourism	1. Travel
2. Tourism	2. Places to Visit	2. Santa Claus	2. Travel	2. Saunas
3. Travel	3. Hotels	3. Travel	3. <b>Skiing</b>	3. Northern Lights
4. <b>Food Tourism</b>	4. <b>Visit</b>	4. Holiday Packages	4. <b>Shopping</b>	4. Places to Visit
5. Northern Lights	5. Saunas	5. Places to Visit	5. <b>Sledding</b>	5. Hotels
6. Santa Claus	6. Tourism	6. Tours	6. Holiday Packages	6. <b>Glass Cabins</b>
7. Tours	7. Travel	7. Cities	7. Saunas	7. <b>Lakes</b>
8. Hotels	8. Tours	8. Hotels	8. Santa Claus	8. <b>Midnight Sun</b>
9. Tourism Attractions	9. <b>Mosques</b>	9. <b>Ice Hotels</b>	9. Hotels	9. <b>Happiness Index</b>
10. <b>Midnight Sun</b>	10. Santa Claus	10. Accommodation	10. Places to Visit	10. Tourism
11. <b>Cafes</b>	11. <b>Happiness Index</b>	11. <b>Skiing</b>	11. <b>Museums</b>	11. Santa Claus
12. <b>Christmas Markets</b>	12. <b>Beaches</b>	12. Tourism	12. Northern Lights	12. <b>Events</b>



But they are not the only  
summer-oriented markets



But they are not the only summer-oriented markets

 Estonia



 Sweden



 Finland



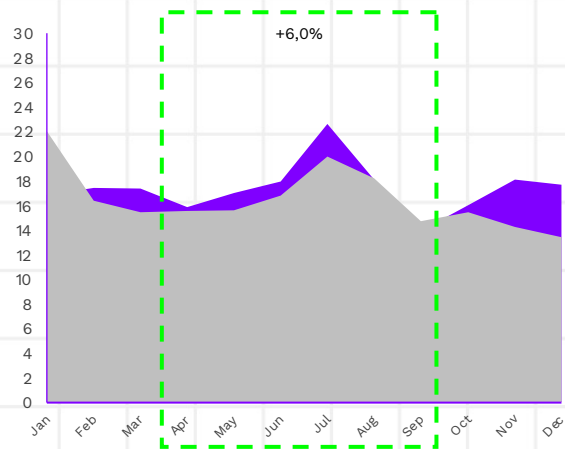


# Estonia, Sweden, and domestic markets of Finland, search mainly in summer, surpassing volumes of 2022

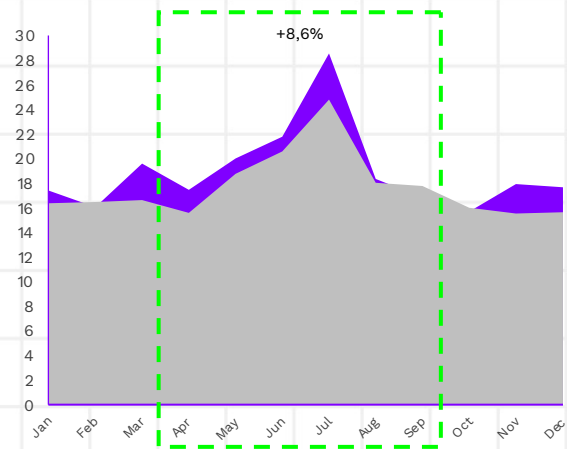
International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands

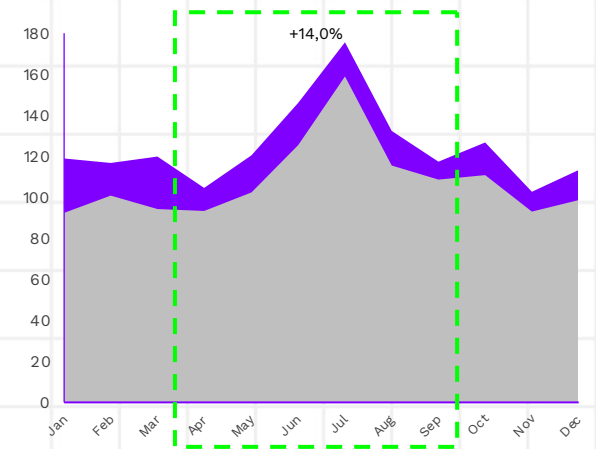
 Estonia



 Sweden



 Finland





# Looking for specific activities such as *Entertainment Parks*, *Boating*, or *SPAs*

## Top Micro-Brandtags for Target Markets of Finland

Order based on the searches Q2 and Q3 2023



### Estonia

1. Cities
2. **Cottages**
3. **Lakes**
4. **Amusement Parks**
5. Places to Visit
6. **Zoos**
7. Camping
8. Museums
9. **Aquaparks**
10. Things to Do
11. Travel
12. Cruises



### Sweden

1. **Boating**
2. **Ferry Connections**
3. Cruises
4. Cities
5. Travel
6. **Saunas**
7. Places to Visit
8. **Lakes**
9. **Aquaparks**
10. Hotels
11. **Swamps and Wetlands**
12. Tourism



### Finland

1. Cities
2. **SPA Resorts**
3. **National Parks**
4. **Lakes**
5. Camping
6. Museums
7. Hotels
8. Restaurants
9. **SPA Hotels**
10. Tourism
11. **Castles and Fortresses**
12. Holiday Packages



5

conclusions 2023

## Conclusions:

1. Tourism is booming worldwide, but it is growing at a slower pace in the Nordic countries
2. Finland grows at twice the rate of its direct competitors
3. Germany remains the top market of Finland, but the fastest-growing ones are the distant markets
4. Finnish winter with an exceptional performance once again
5. Searches for spring and summer in Finland continue to grow organically

# Thank you!

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