

A smiling woman with dark hair is looking at a laptop screen. The background is blurred, showing an indoor setting.

Finland's Touristic Demand

Digital Demand Research by Bloom Consulting



Visit Finland

Finland's Touristic Demand

Summary of 2022 and Q1 2023 data for Digital Demand©

April 28th, 2023

Google



Google Search

I'm Feeling Lucky



#Digitalidentity
#Digitalcountry

Demand



#Digital identity

Demand



#Digital identity

Supply





An aerial photograph of a dense forest, likely a coniferous forest, with a vertical line running down the center of the image. The trees are dark green and brown, and the ground is a mix of blue and brown. The text is overlaid on the left side of the image.

The “new reality” framework International searches excluding China and Russia.

The “new reality” framework



Considering the current invasion of Ukraine, there is **NO** more market. Recovery is forecast in the long-term.

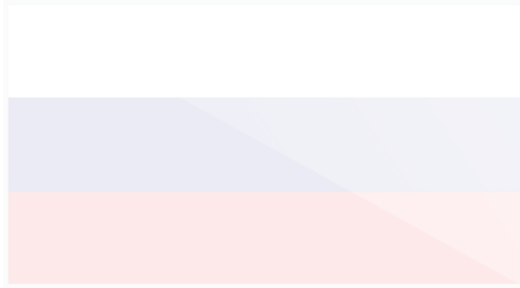


China



Rest of the World

The “new reality” framework



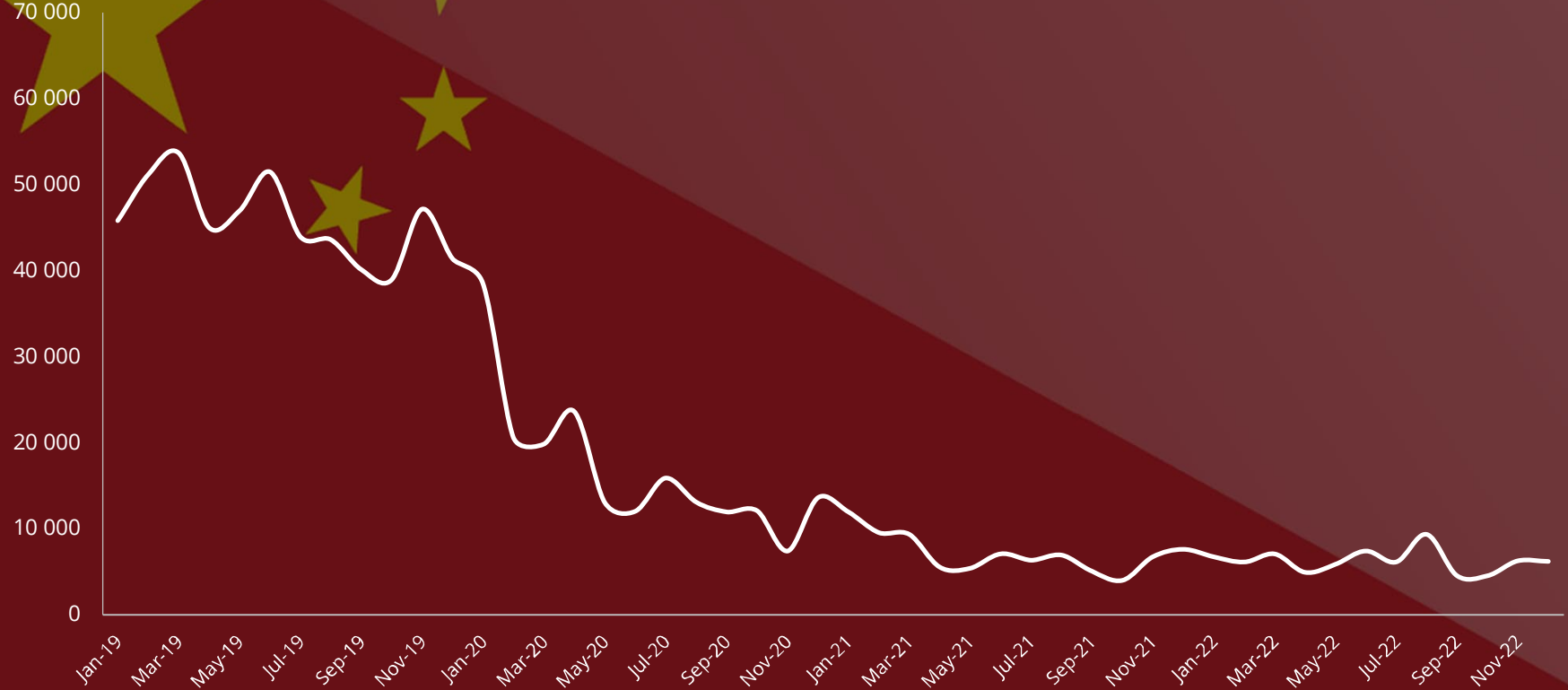
Russia



Rest of the World

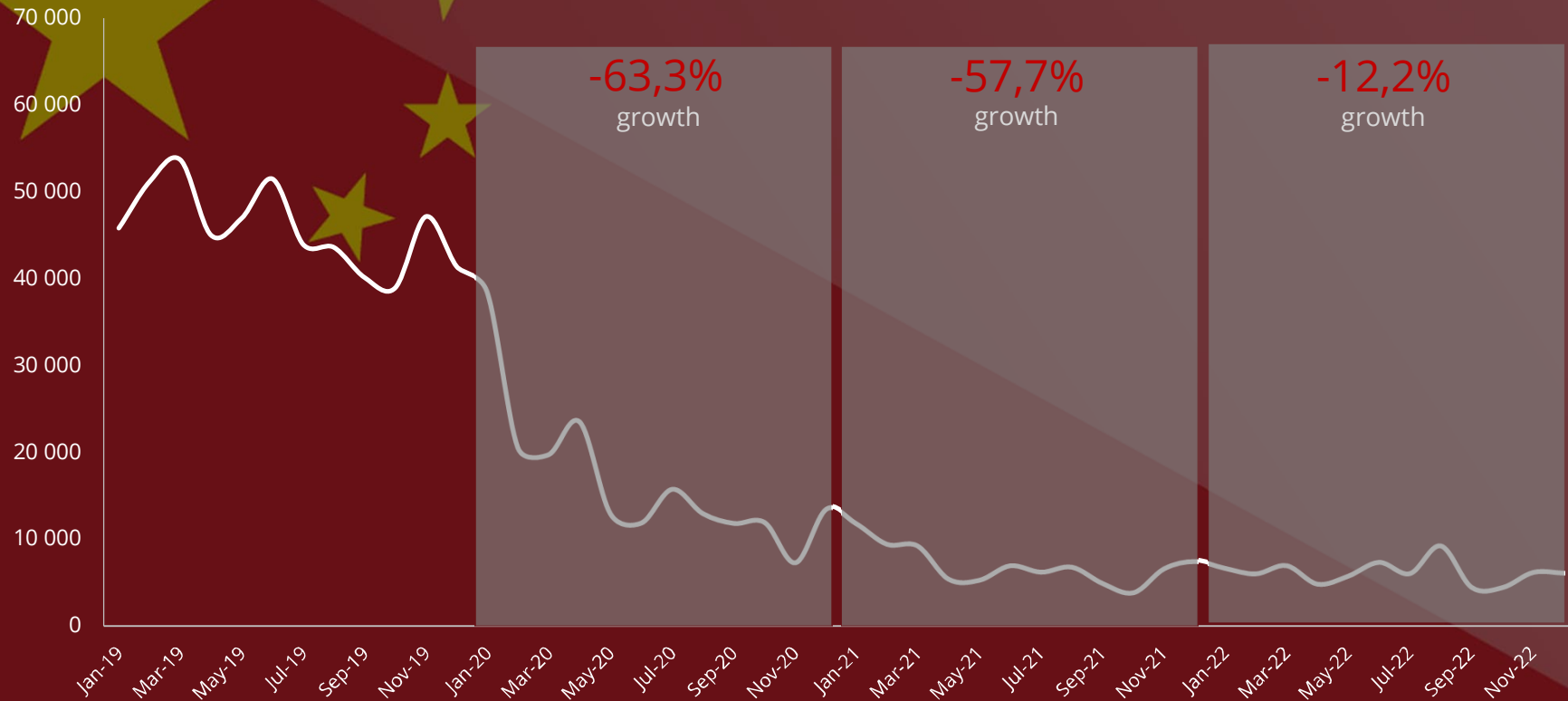
The Chinese market has been decreasing over the last years

TM China Seasonality Finland ■ Finland



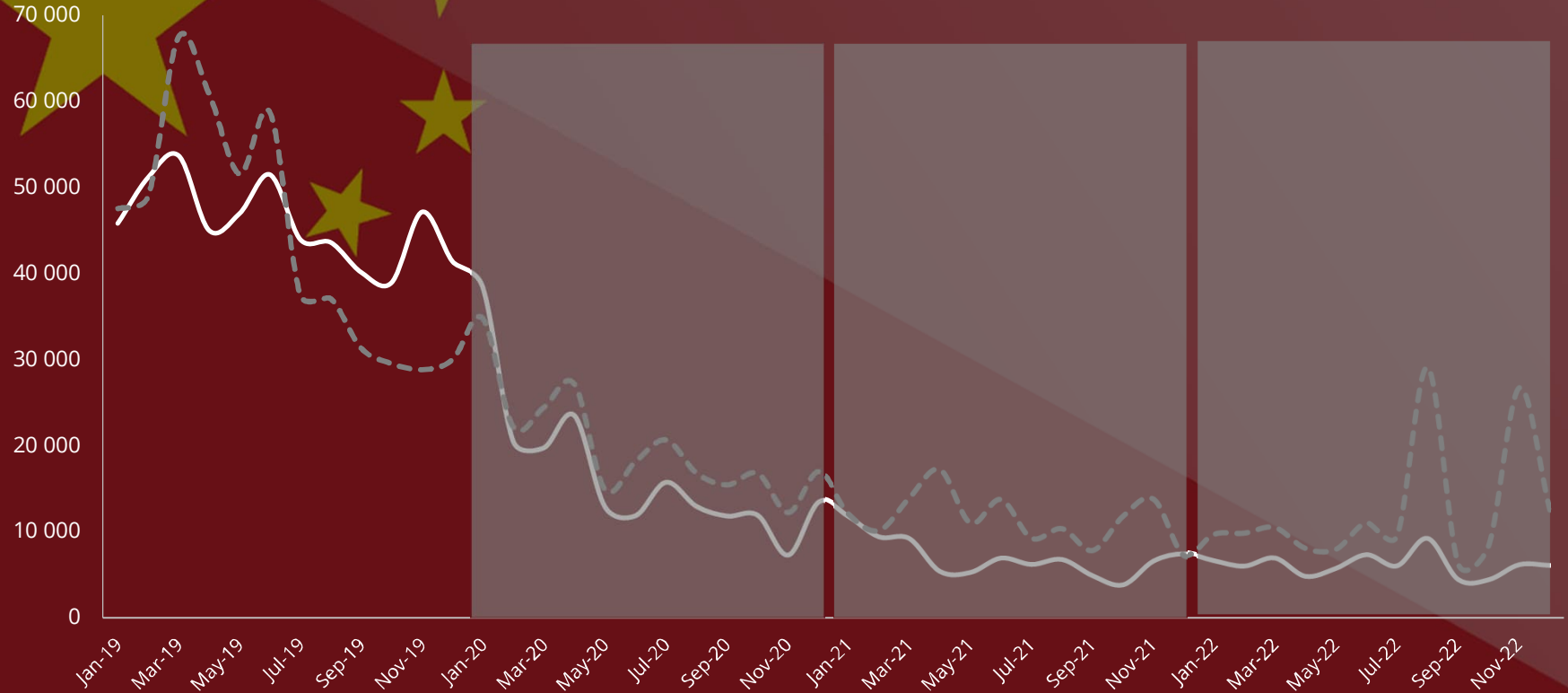
More strongly after the Covid-19 outbreak in January 2020

TM China Seasonality Finland ■ Finland

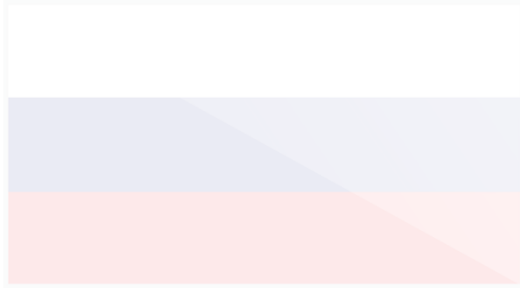


It is affecting Finland and all other Chinese outbound markets

TM China Seasonality Finland ■ Finland ■ AVG Competitors



The “new reality” framework



Russia

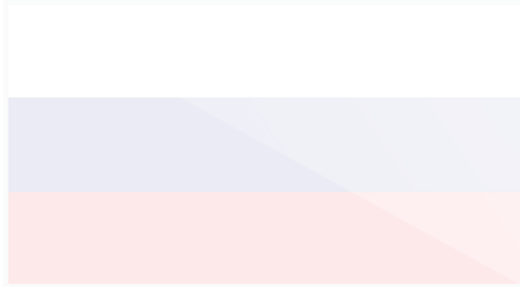


The strong restrictions of movement during Covid-19 are having a longer effect. Slow recovery forecast.



Rest of the World

The “new reality” framework



Russia



China



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

The “new reality” framework 2019 baseline for comparison.

Reason 1: The “shock” to the touristic trend



Reason 2: 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

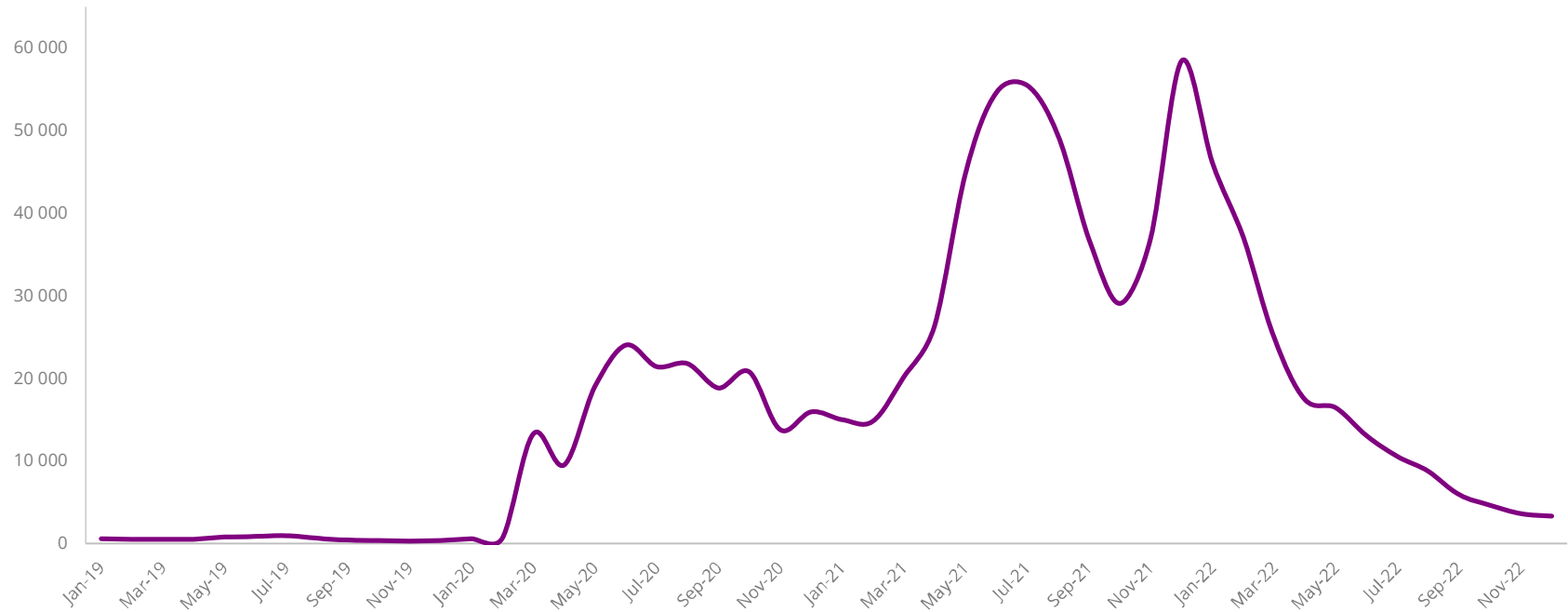
Accommodation

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

Strong impact of Covid-19

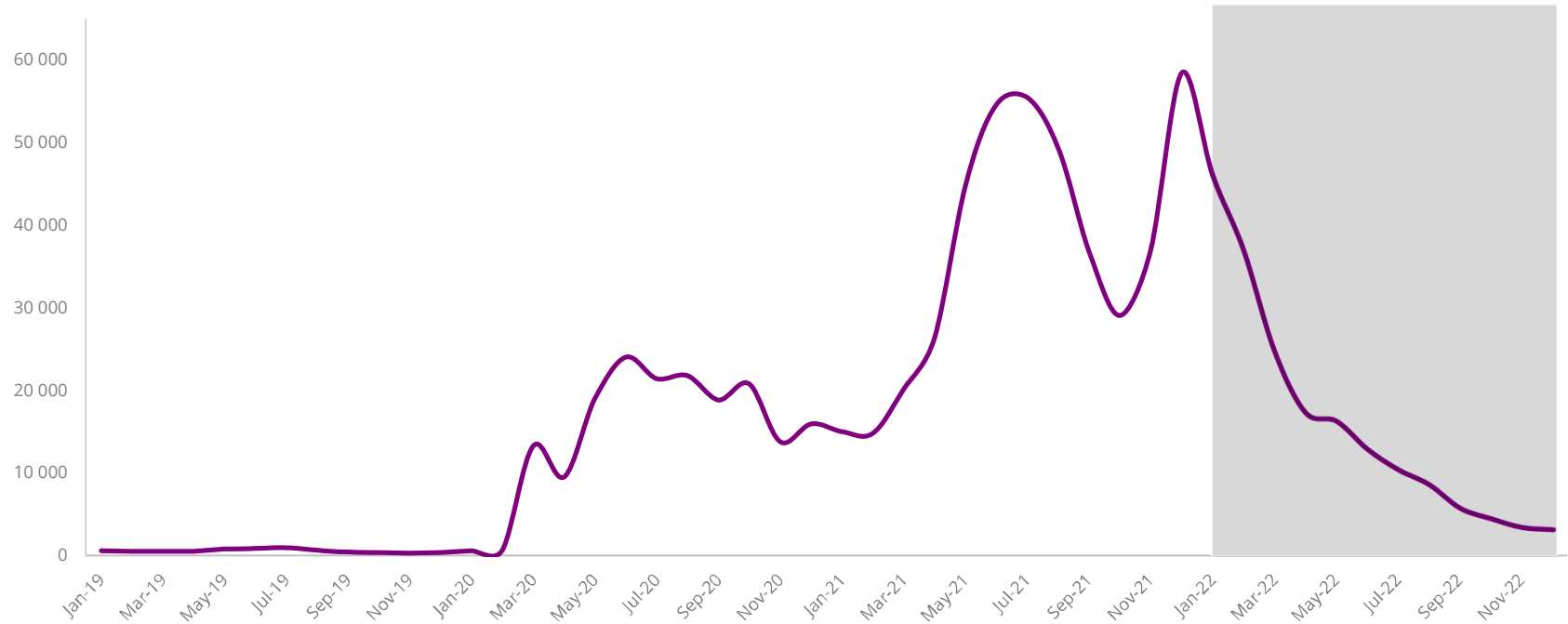
Consideration 2: The “behavioral” change with new searches for hygiene and travel

TRAVEL RESTRICTIONS search behavior (avg in the region)



Consideration 2: The “behavioral” change with new searches for hygiene and travel

TRAVEL RESTRICTIONS search behavior (avg in the region)



Covid-19 searches are over.
Tourism has recovered.

Question 1

How was 2022 for Finland and its competitors?

#Conclusion 1

Nordic countries gain the
best results in their history.

Touristic searches for the Nordic countries have increased

+41%

AVG growth in the region
2022 vs 2019



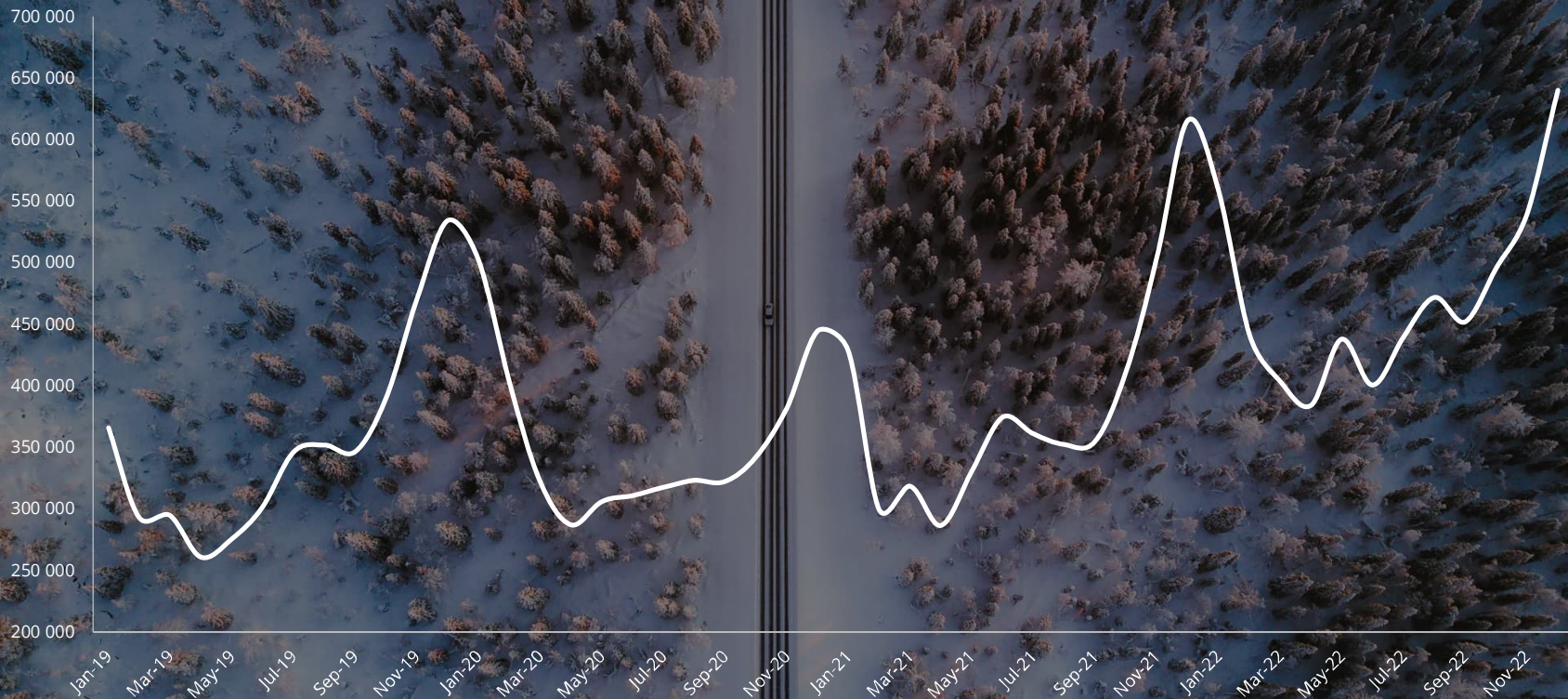
#Conclusion 1

Nordic countries gain the
best results in their history.

#Conclusion 2

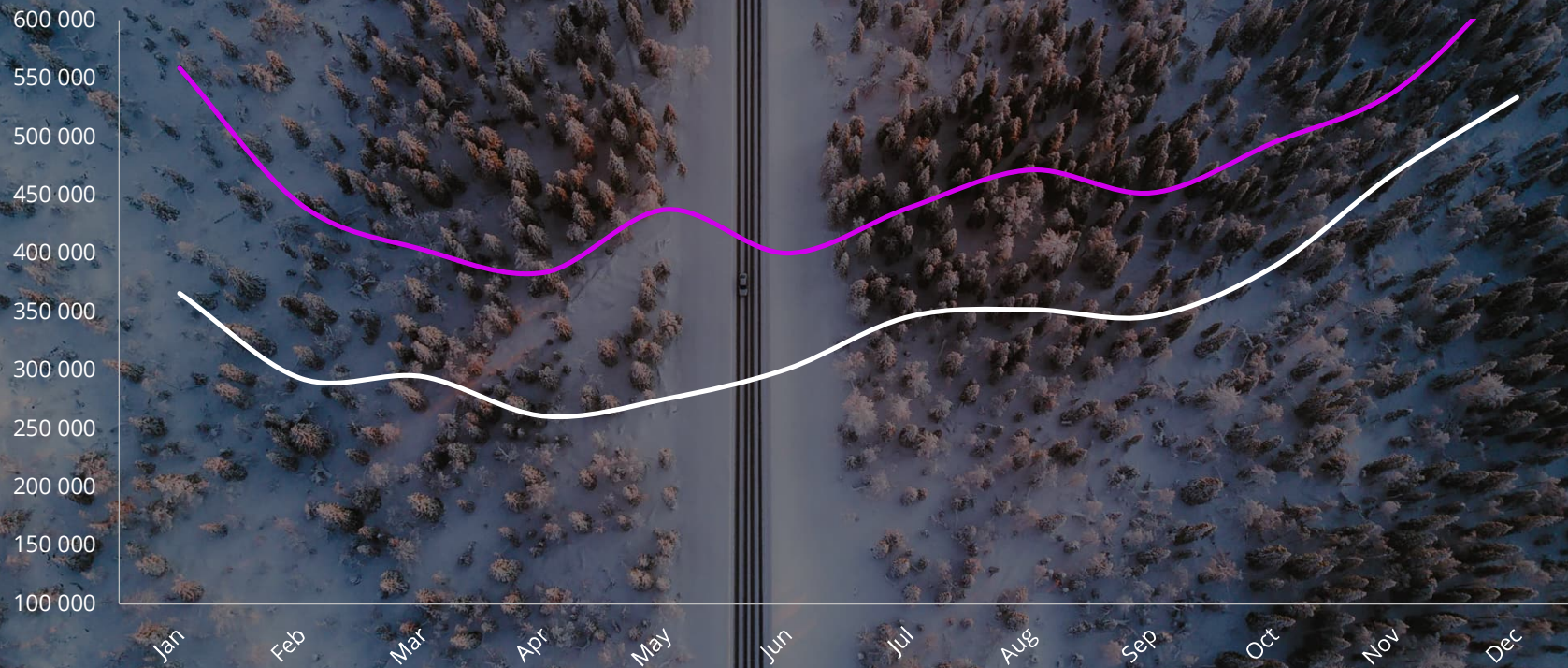
So does Finland!

Finland's seasonality since 2019



Finland's seasonality 2022 vs 2019

■ 2019 ■ 2022



Finland's international touristic appeal 2022

5,6

million searches
in 2022

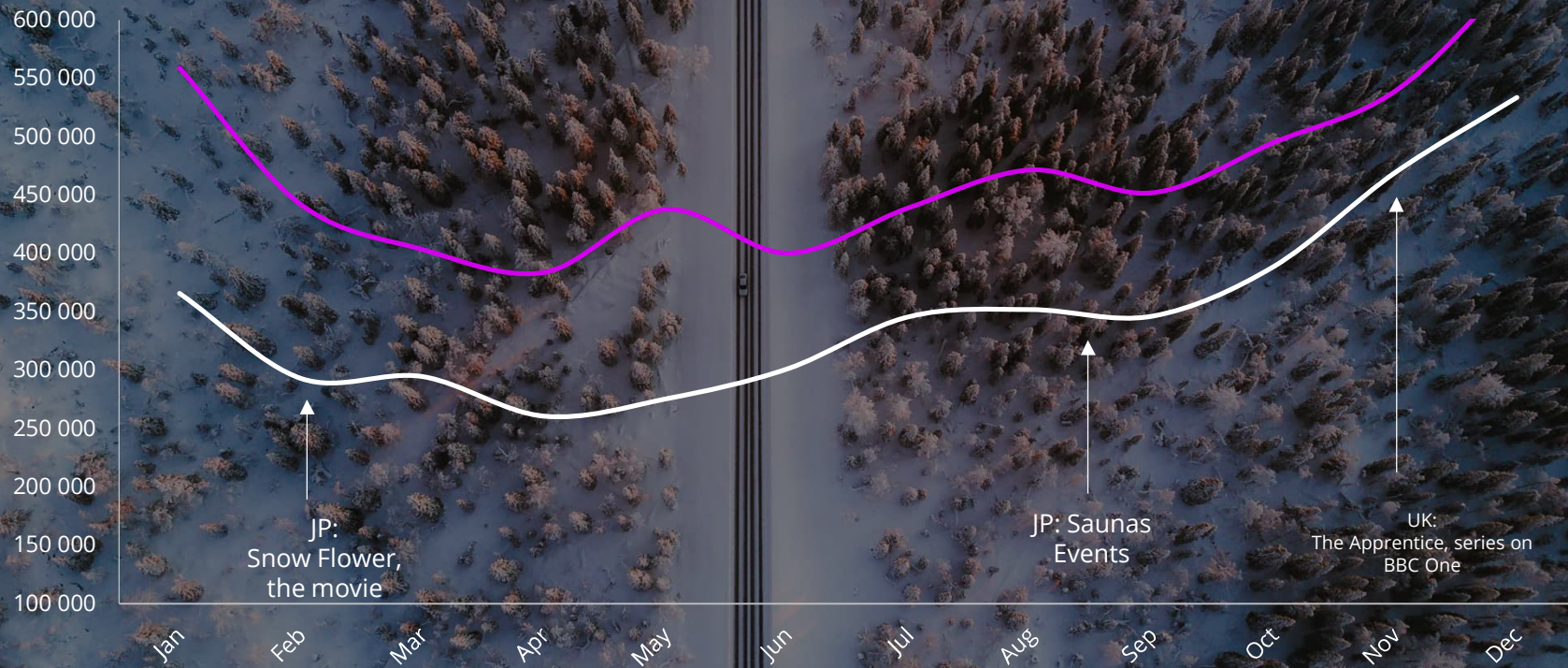
+31%

growth
2022 vs 2019

Finland reports its best results ever...

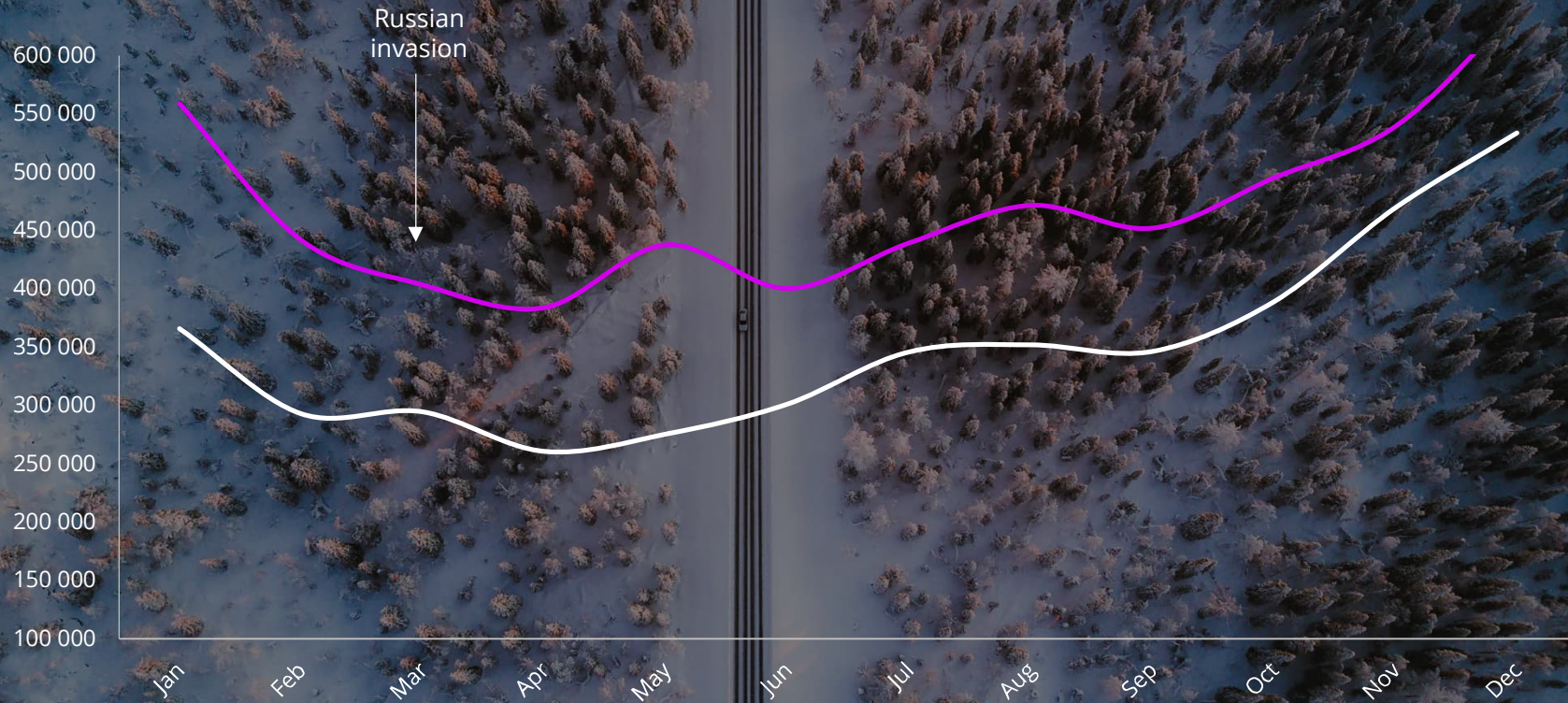
...surpassing 2019's events and campaigns in top markets

■ 2019 ■ 2022



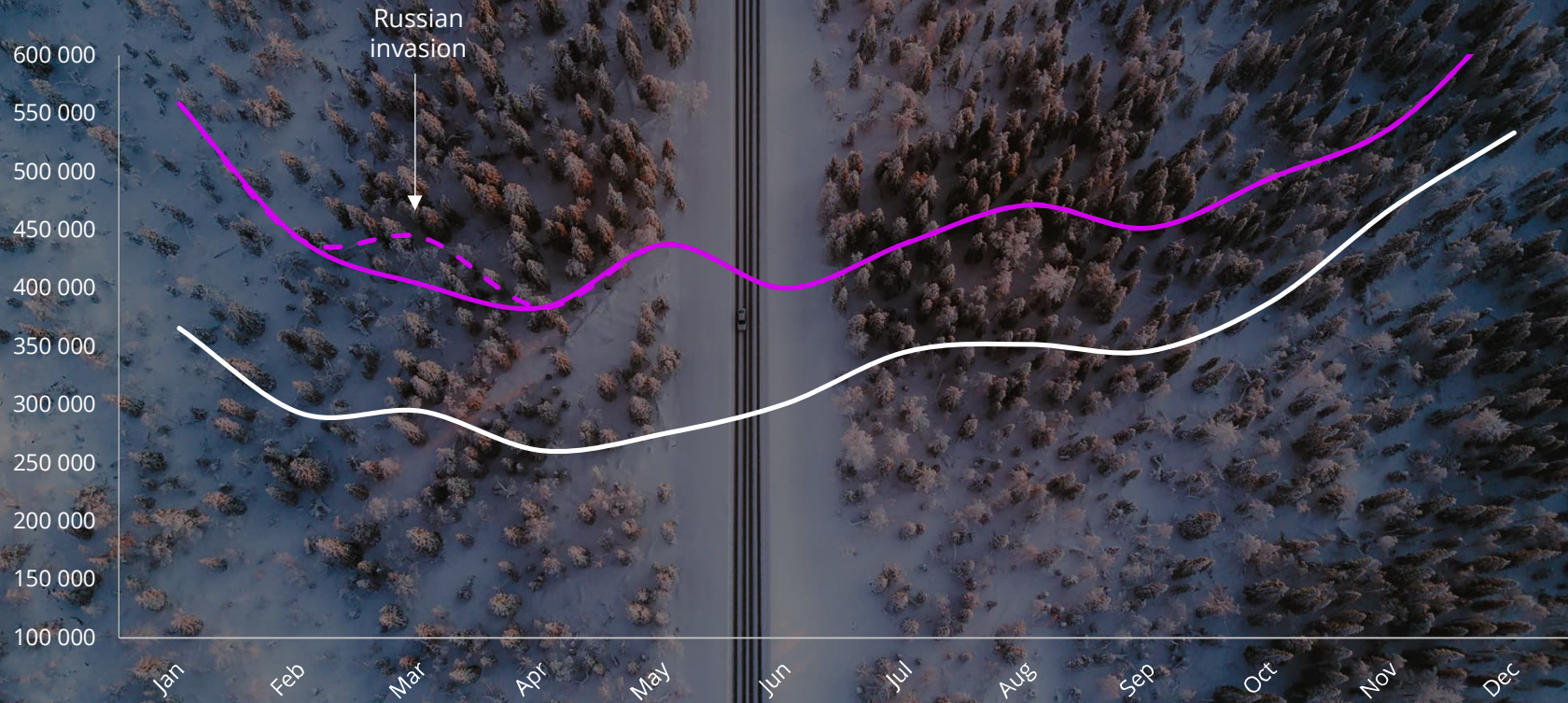
...despite the proximity of the war

■ 2019 ■ 2022



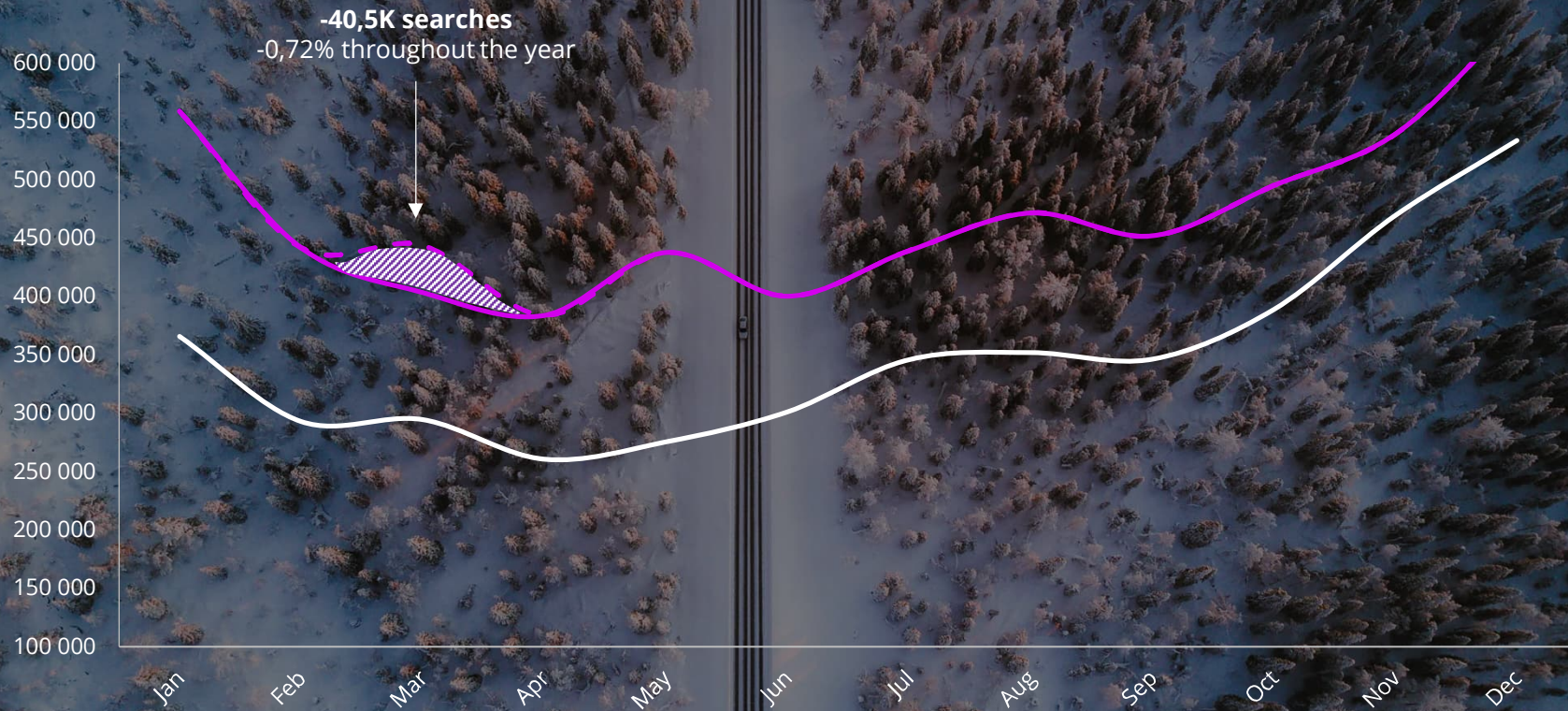
...despite the proximity of the war

■ 2019 ■ 2022



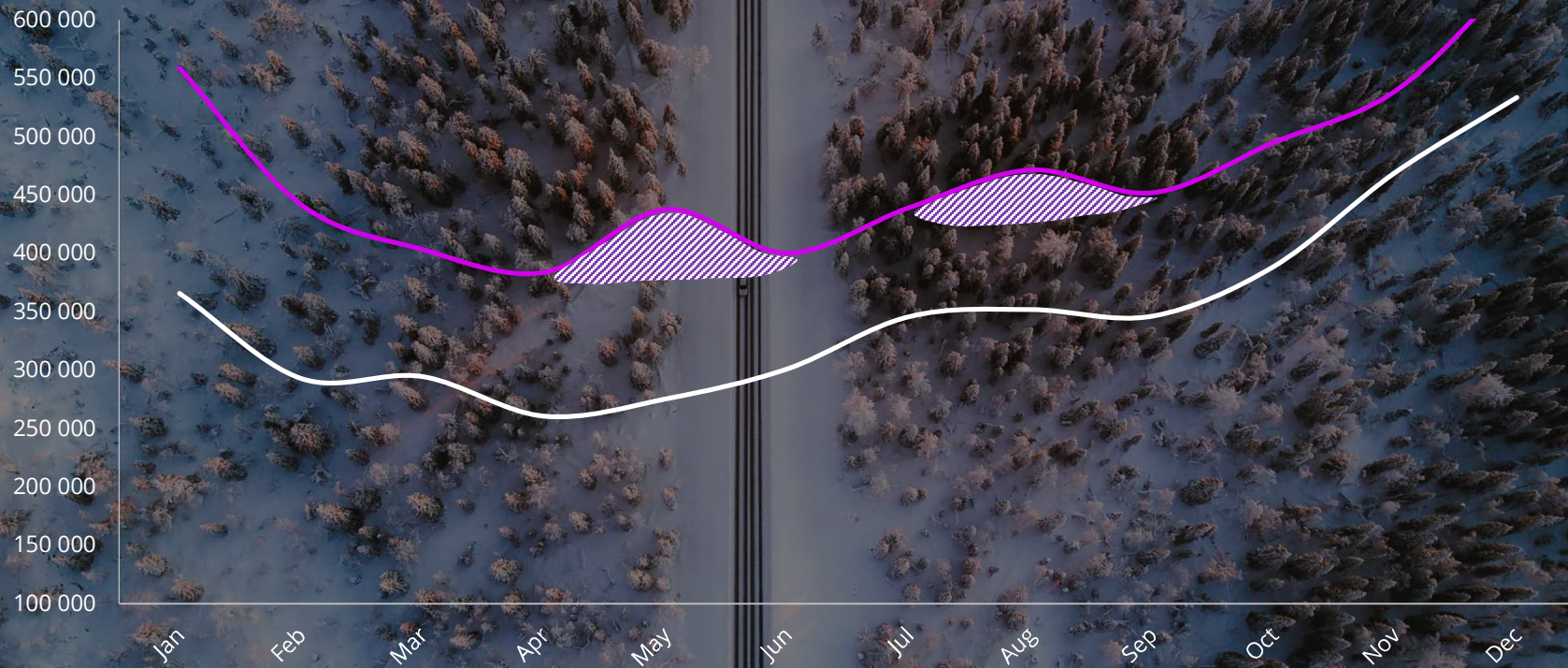
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■ 2019 ■ 2022



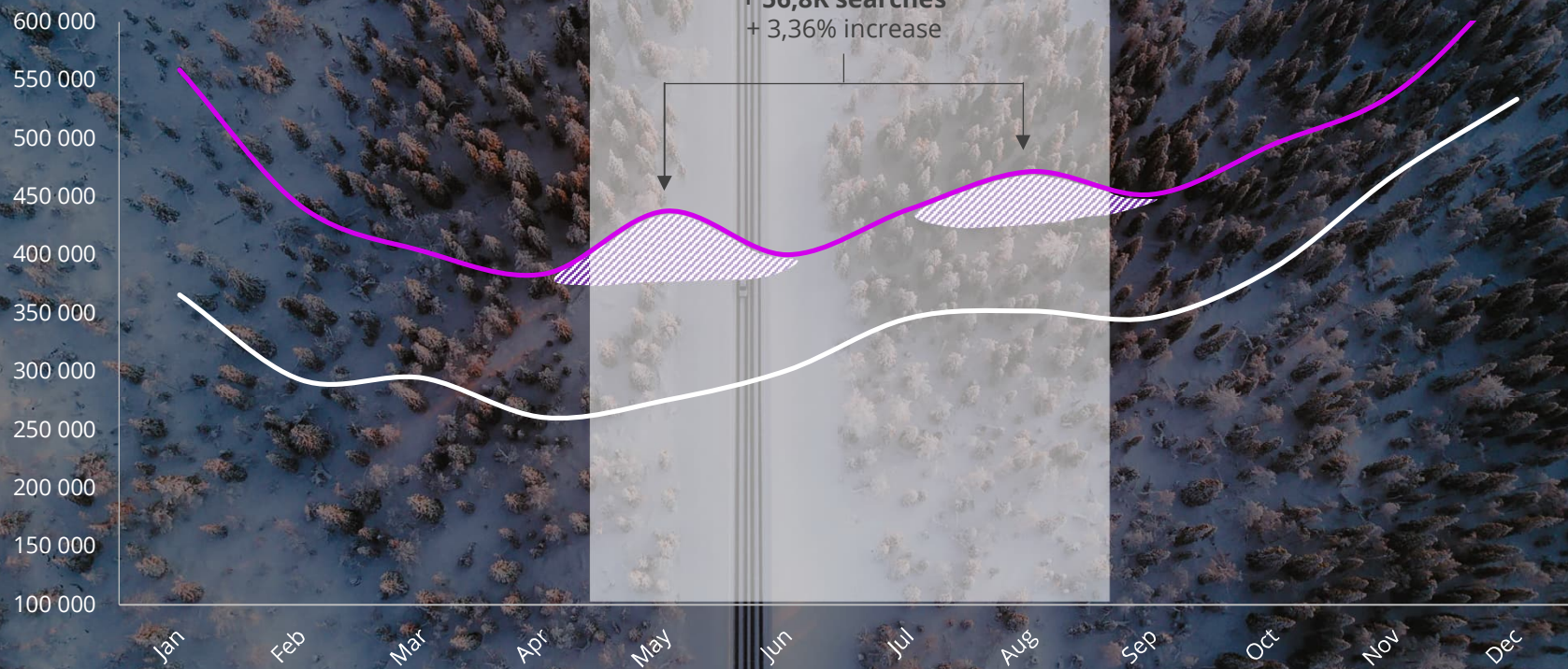
...continuing to show signs of summer interest

■ 2019 ■ 2022



...continuing to show signs of summer interest

■ 2019 ■ 2022

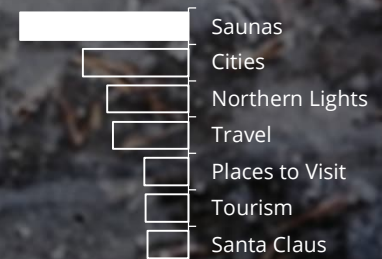


#Conclusion 3

Finland has a strong and
established “touristic” image.

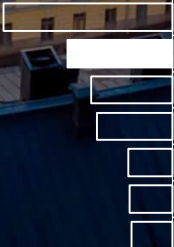
Saunas

Top Micro-Brandtags Finland
Searches 2022



Cities

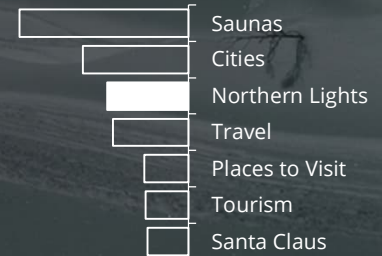
Top Micro-Brandtags Finland Searches 2022



Saunas
Cities
Northern Lights
Travel
Places to Visit
Tourism
Santa Claus

Northern Lights

Top Micro-Brandtags Finland
Searches 2022



Finland is also searched for attractions such as:

Santa



Glass Cabins



Lakes



Skiing



Camping



Golf



The majority of Finland Brandtags showed growth in 2022

Top 15 Micro-Brandtags for Finland

Searches 2022, growth of searches 2022 vs 2019

Micro-Brandtags	Searches	Growth
1. Saunas	748K	+63,1%
2. Cities	467K	+67,2%
3. Northern Lights	360K	+31,9%
4. Travel	335K	+25,2%
5. Hotels	289K	+146,6%
6. Places to Visit	196K	+13,1%
7. Tourism	189K	-36,3%
8. Santa Claus	181K	+58,9%
9. Glass Cabins	173K	+10,7%
10. Holiday Packages	143K	-7,3%
11. Lakes	127K	+24,8%
12. Travel Restrictions	122K	+4875,1%
13. Vacation Packages	116K	+10,0%
14. Things to Do	100K	+14,2%
15. Skiing	96K	+51,3%

The top Brandtags remain similar

Top 15 Micro-Brandtags for Finland

Searches 2022

Micro-Brandtags	Searches
1. Saunas	748K
2. Cities	467K
3. Northern Lights	360K
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Top 15 Micro-Brandtags for Finland

Searches 2019

Micro-Brandtags	Searches
1. Saunas	459K
2. Tourism	296K
3. Cities	279K
4. Northern Lights	273K
5. Saunas	268K
6. Places to Visit	174K
7. Glass Cabins	157K
8. Holiday Packages	155K
9. Hotels	117K
10. Santa Claus	114K
11. Vacation Packages	106K
12. Lakes	102K
13. Things to Do	87K
14. Camping	85K
15. Tours	75K

The top Brandtags remain similar, with minor exceptions

Top 15 Micro-Brandtags for Finland

Searches 2022

Micro-Brandtags	Searches
1. Saunas	748K
2. Cities	467K
3. Northern Lights	360K
4. Travel	335K
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#Conclusion 4

Germany is target market
#1 for Finland.

Germany is #1 among Finland's top target markets

Target Markets of Finland

Searches 2022, growth and position evolution in comparison to 2019

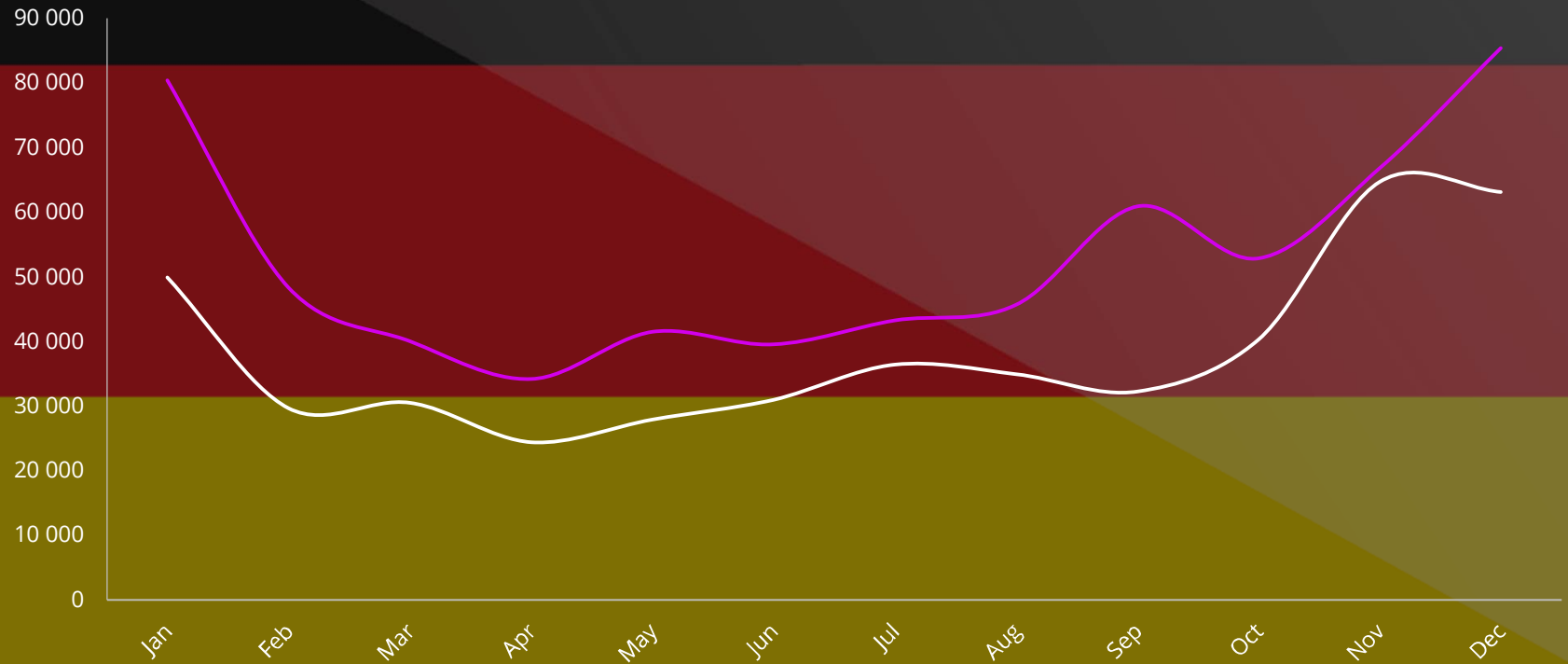
#	Target Market	Searches	Growth	Position
1	 Germany	638K	+37,3%	▲ 1
2	 Japan	598K	+13,1%	▼ 1
3	 United States	577K	+50,2%	-
4	 United Kingdom	386K	+30,3%	-
5	 Italy	286K	+34,7%	▲ 1
6	 France	284K	+21,6%	▼ 1
7	 Spain	249K	+35,3%	-
8	 Netherlands	179K	+39,7%	-
9	 Estonia	175K	+69,1%	▲ 3
10	 India	164K	+33,1%	▼ 1

#	Target Market	Searches	Growth	Position
11	 Sweden	155K	+30,1%	▲ 1
12	 Canada	141K	+53,3%	▲ 1
13	 Switzerland	137K	+22,7%	▼ 2
14	 Austria	99K	+24,9%	-
15	 Australia	90K	+32,4%	-
16	 Belgium	82K	+28,0%	-
17	 South Korea	58K	+42,3%	-

Seasonality Germany 2022 vs 2019

■ 2019 ■ 2022

TM Germany



What Germany searches for:

Northern Lights



Saunas



Vacation Packages



Camping



Cities



Glass Cabins



List of the Top 15 Micro-Brandtags from the German target market

Top 15 Micro-Brandtags from German target market

Searches 2022, growth of searches 2022 vs 2019

Micro-Brandtags	Searches	Growth
1. Northern Lights	66,8K	+43,0%
2. Saunas	66,7K	+46,7%
3. Vacation Packages	65,8K	+4,7%
4. Tourism Attractions	36,6K	+64,6%
5. Travel	35,5K	+37,0%
6. Camping	31,3K	+27,5%
7. Cities	27,9K	+25,9%
8. Hotels	25,6K	+234,7%
9. Glass Cabins	23,9K	+25,1%
10. Holiday Apartments	19,9K	-2,6%
11. Santa Claus	15,3K	+62,9%
12. Skiing	14,6K	+90,0%
13. Ice Hotels	11,9K	+119,2%
14. Lakes	11,4K	+16,1%
15. Travel Restrictions	11,0K	+801,8%

... while all international markets have increased

Target Markets of Finland

Searches 2022, growth and position evolution in comparison to 2019

#	Target Market	Searches	Growth	Position
1	 Germany	638K	+37,3%	▲ 1
2	 Japan	598K	+13,1%	▼ 1
3	 United States	577K	+50,2%	-
4	 United Kingdom	386K	+30,3%	-
5	 Italy	286K	+34,7%	▲ 1
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16	 Belgium	82K	+28,0%	-
17	 South Korea	58K	+42,3%	-

The USA, Estonia and Canada are three markets that have showed extraordinary growth since 2019



United States

+50,2%



Estonia

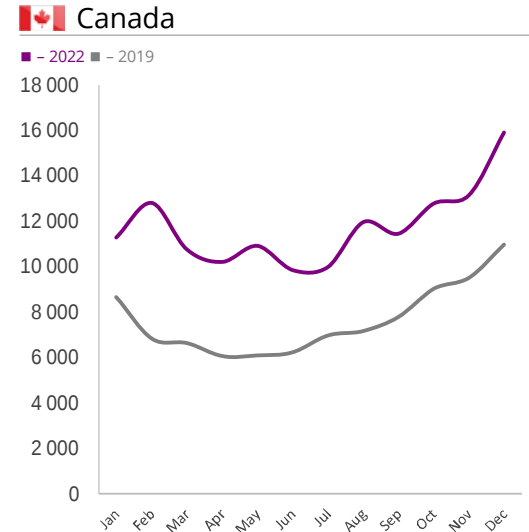
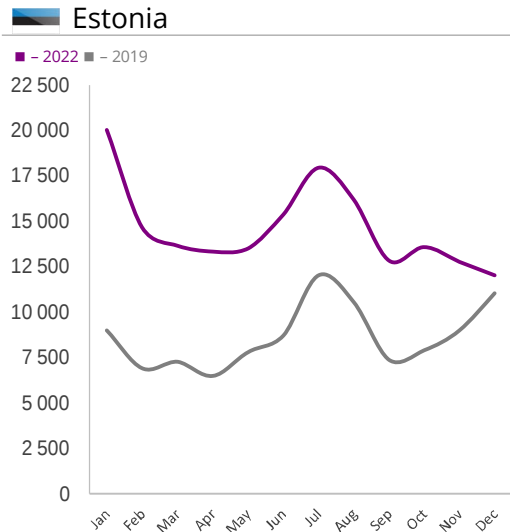
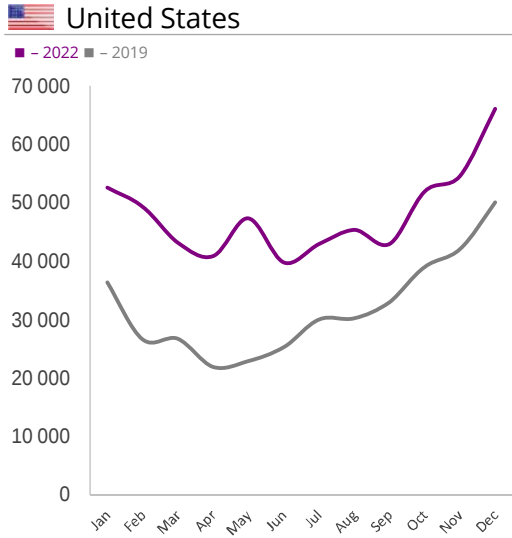
+69,1%



Canada

+53,3%

Searches from the USA and Canada are quite evenly distributed throughout the year, while Estonia shows a clear summer interest



All three search for generic inspiration for travel or cities...



United States

Searches 2022

#	Micro-Brandtags	Searches
1	Saunas	112K
2	Cities	45K
3	Igloos Hotels	41K
4	Santa Claus	25K
5	Things to Do	23K
6	Travel	21K
7	Hotels	20K
8	Golf	19K
9	Ice Hotels	15K
10	Vacation Packages	14K



Estonia

Searches 2022

#	Micro-Brandtags	Searches
1	Cities	50K
2	Travel	20K
3	Lakes	11K
4	Cottages	8,6K
5	Ski Resorts	5,9K
6	Aquaparks	4,6K
7	Amusement Parks	4,1K
8	Places to Visit	3,9K
9	Ski Hostels	3,6K
10	Camping	3,4K



Canada

Searches 2022

#	Micro-Brandtags	Searches
1	Hotels	27K
2	Saunas	21K
3	Cities	8,9K
4	Spa & Beauty Treat.	6,1K
5	Travel	5,3K
6	Igloos Hotels	3,6K
7	Santa Claus	3,2K
8	Things to Do	3,1K
9	Tourism	3,1K
10	Hotels	3,0K

...but they behave differently, especially Estonia, whose searches differ greatly from international behaviour



United States

Searches 2022

#	Micro-Brandtags	Searches
1	Saunas	112K
2	Cities	45K
3	Igloos Hotels	41K
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Estonia

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Canada

Searches 2022

#	Micro-Brandtags	Searches
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8	Things to Do	3,1K
9	Tourism	3,1K
10	Hotels	3,0K

#Conclusion 5

Finnish tourists developed an
appetite for domestic travel

Finland's domestic touristic appeal 2022

836

thousand searches
in 2022

+48,6%

growth
2022 vs 2019

Seasonality Finland domestic 2022 vs 2019

■ 2019 ■ 2022

TM Domestic

140 000

120 000

100 000

80 000

60 000

40 000

20 000

Jan

Feb

Mar

Apr

May

Jun

Jul

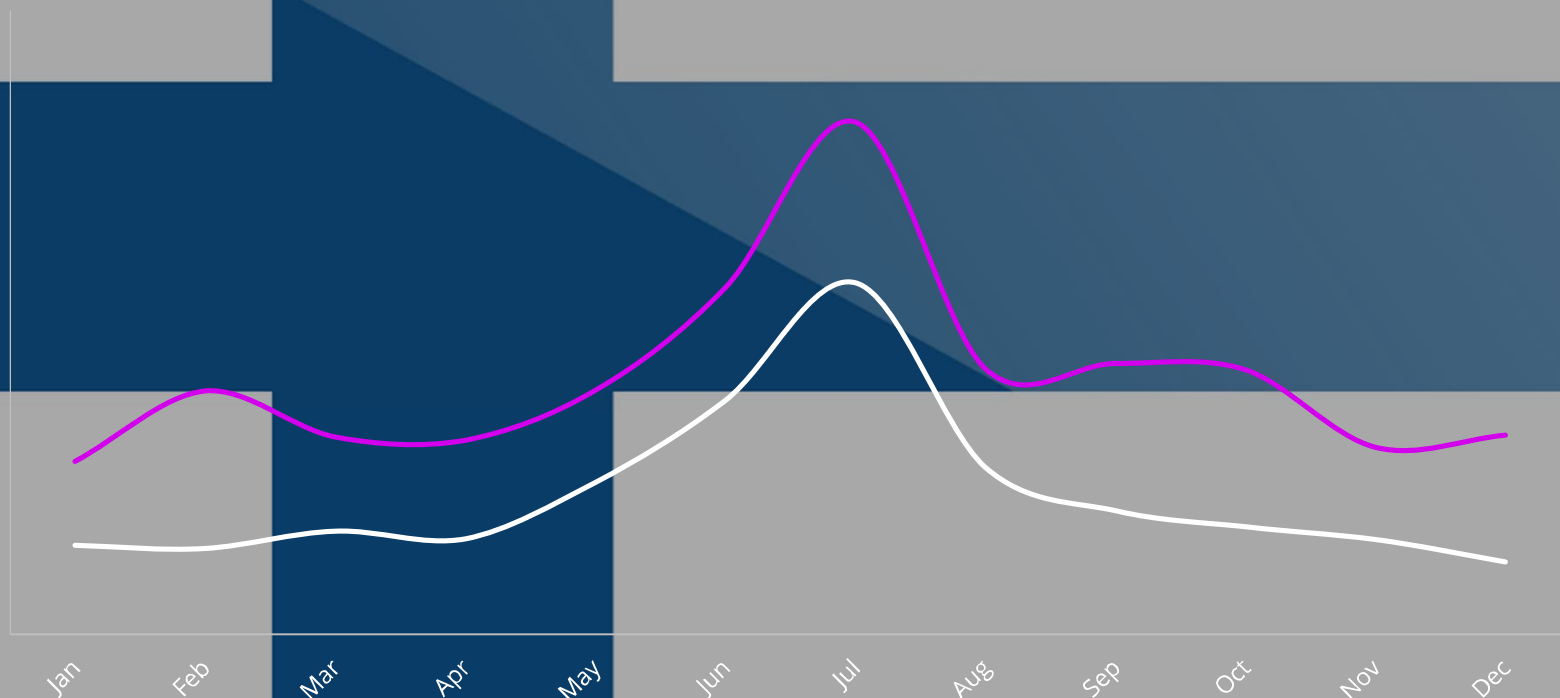
Aug

Sep

Oct

Nov

Dec



List of the Top 15 Micro-Brandtags for Finland's domestic market

 Top 15 Micro-Brandtags from Domestic target market

Searches 2022, growth of searches 2022 vs 2019

Micro-Brandtags	Searches	Growth
1. Cities	168K	+80,6%
2. SPA Resorts	113K	+107,6%
3. National Parks	76K	+54,7%
4. Lakes	40K	+24,9%
5. Camping	36K	+1,6%
6. Castles and Fortresses	28K	+34,4%
7. SPA Hotels	23K	+92,7%
8. Hotels	19K	+120,7%
9. Golf	15K	101,3%
10. Travel	15K	+57,5%
11. Aquaparks	14K	+83,1%
12. Cycling	13K	+5,8%
13. Sami	11K	+63,7%
14. Amusement Parks	10K	+21,3%
15. Casinos	9K	+53,7%

Domestic and international tourist searches have only a few things in common...

Top 15 Micro-Brandtags (Domestic)

Searches 2022

Micro-Brandtags	Searches
1. Cities	168K
2. SPA Resorts	113K
3. National Parks	76K
4. Lakes	40K
5. Camping	36K
6. Castles and Fortresses	28K
7. SPA Hotels	23K
8. Hotels	19K
9. Golf	15K
10.Travel	15K
11.Aquaparks	14K
12.Cycling	13K
13.Sami	11K
14.Amusement Parks	10K
15.Casinos	9K

Top 15 Micro-Brandtags (International)

Searches 2022

Micro-Brandtags	Searches
1. Saunas	749K
2. Cities	468K
3. Northern Lights	360K
4. Travel	336K
5. Hotels	290K
6. Places to Visit	197K
7. Tourism	189K
8. Santa Claus	181K
9. Glass Cabins	174K
10.Holiday Packages	144K
11.Lakes	127K
12.Travel Restrictions	122K
13.Vacation Packages	117K
14.Things to Do	100K
15.Skiing	97K

...illustrating again the wide gap between these two groups of tourists

 Top 15 Micro-Brandtags (Domestic)

Searches 2022

Micro-Brandtags	Searches
1. Cities	168K
2. SPA Resorts	113K
3. National Parks	76K
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 Top 15 Micro-Brandtags (International)

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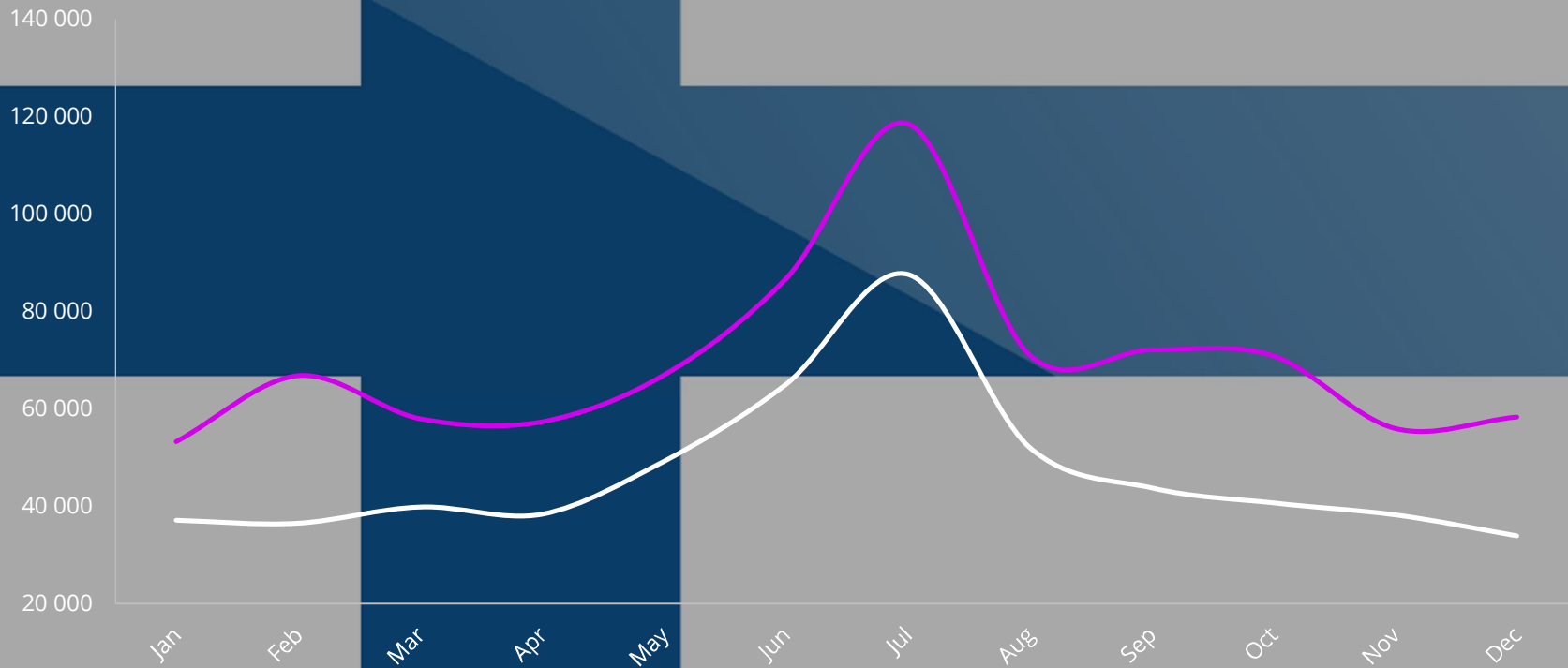
#Conclusion 5

Finnish tourists developed an appetite for domestic travel, but the restrictions coming to an end slowly decreased it again.

Seasonality Finland domestic 2022 vs 2019

■ 2019 ■ 2022

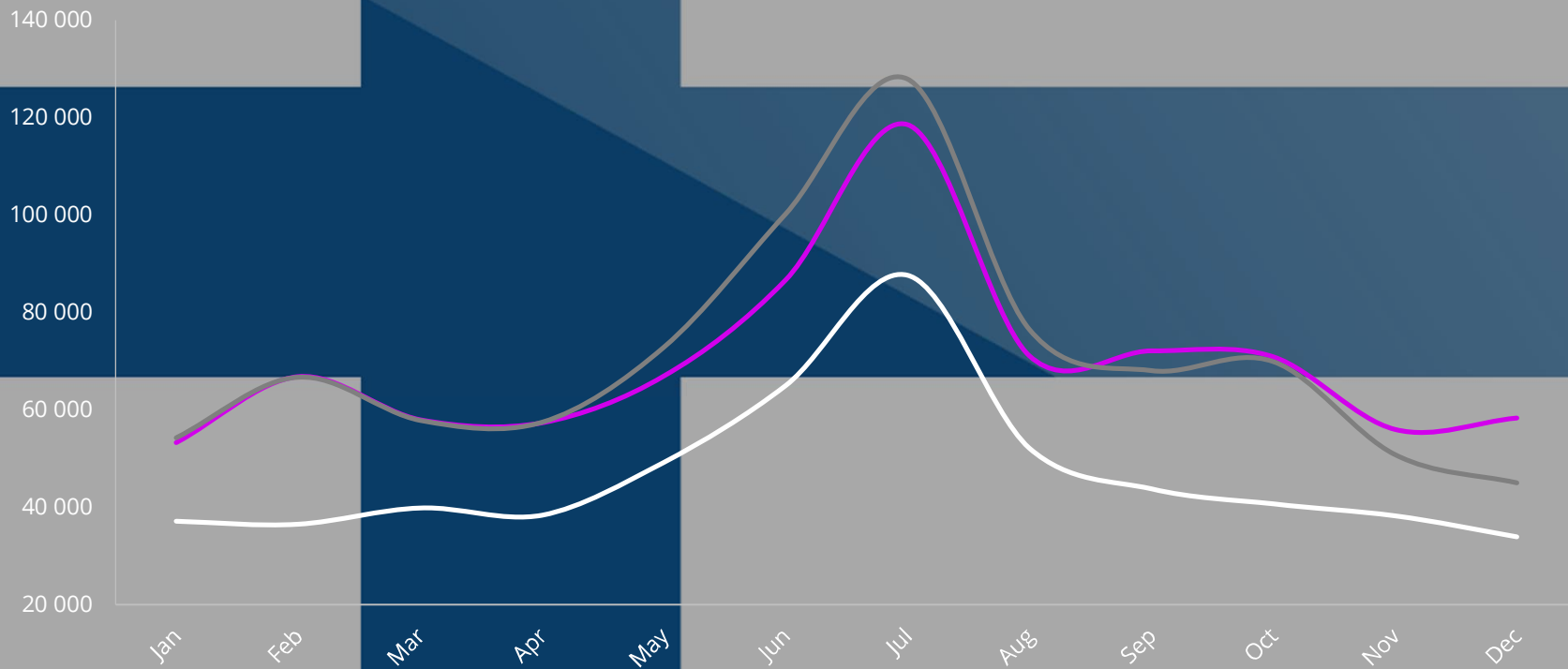
TM Domestic



Seasonality Finland domestic 2022 vs 2019

■ 2019 ■ 2021 ■ 2022

TM Domestic



Question 2

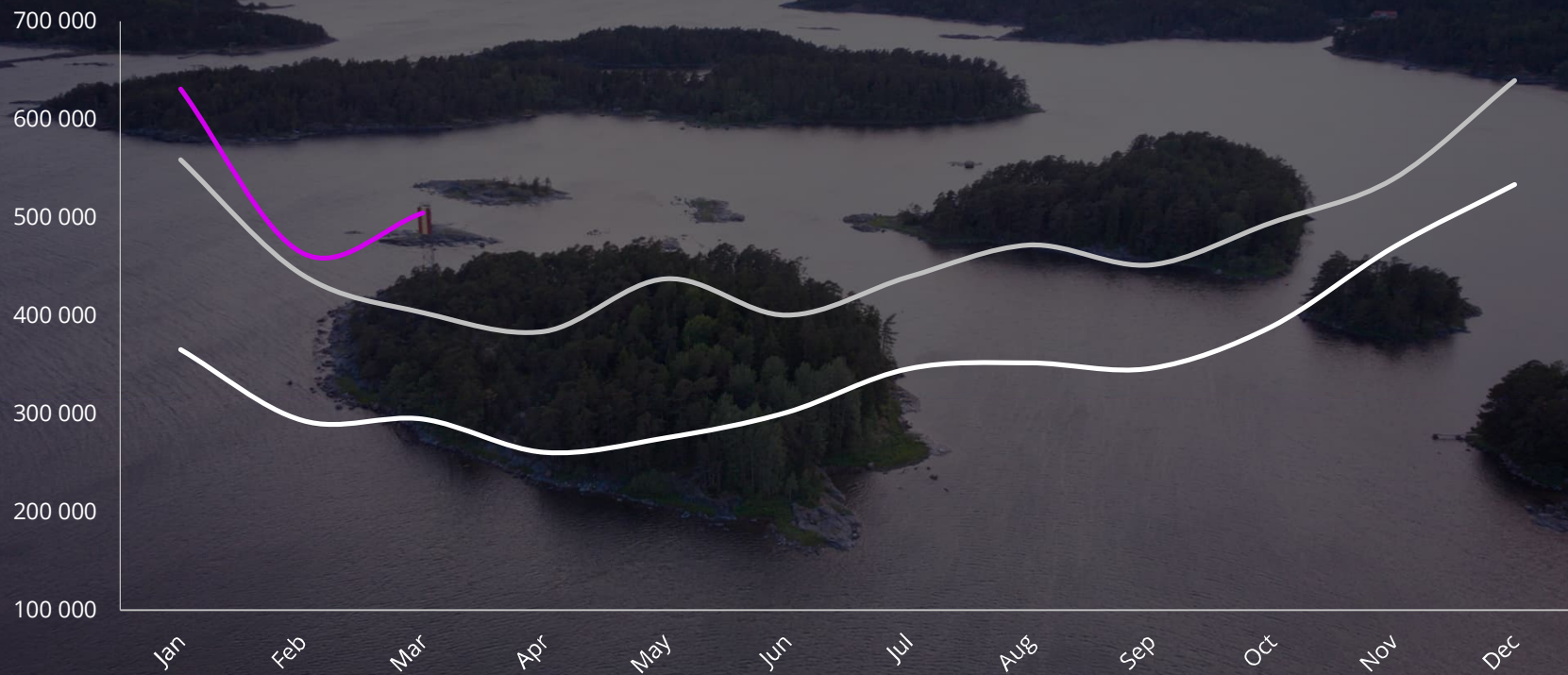
Is the trend for Finland
continuing in 2023?

#Conclusion 6

Searches for Finland continue
to grow in Q1 2023.

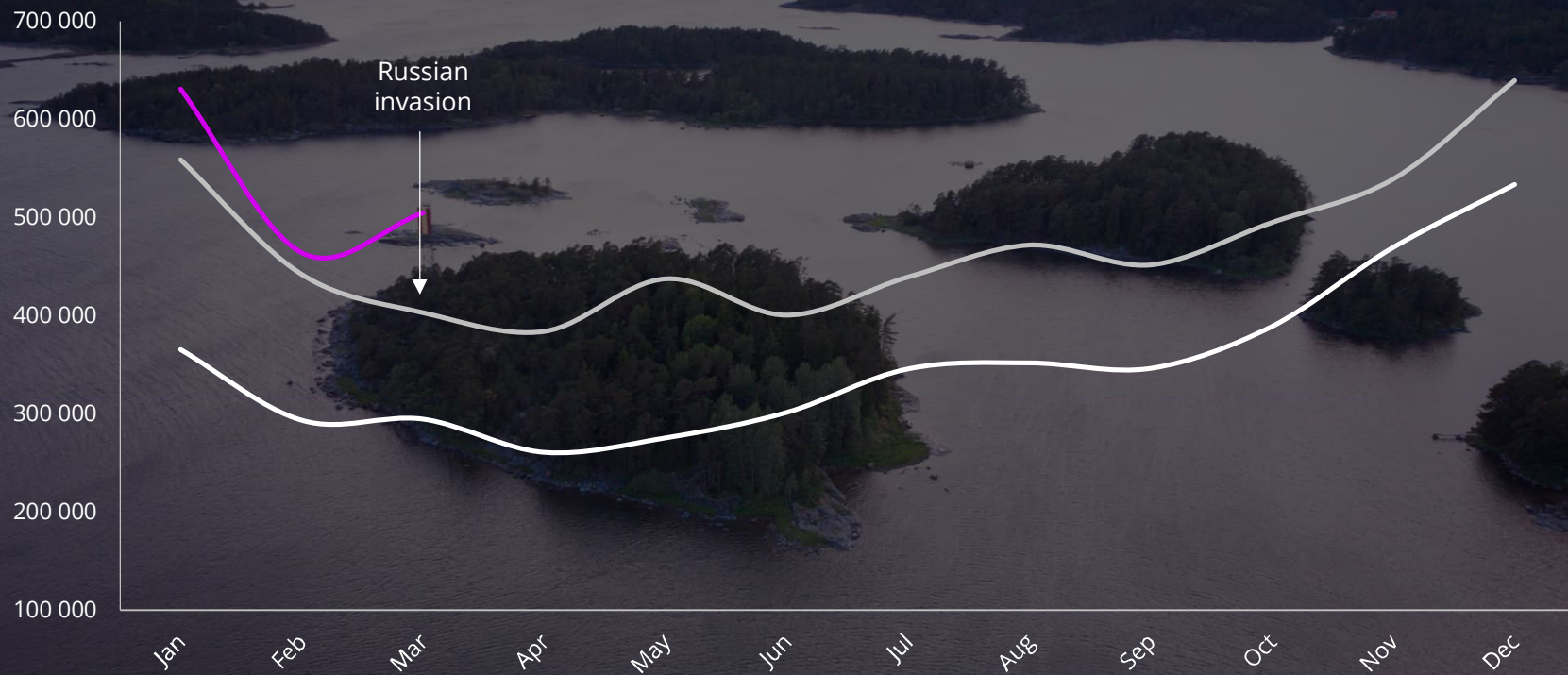
Seasonality Finland international

■ 2019 ■ 2022 ■ 2023



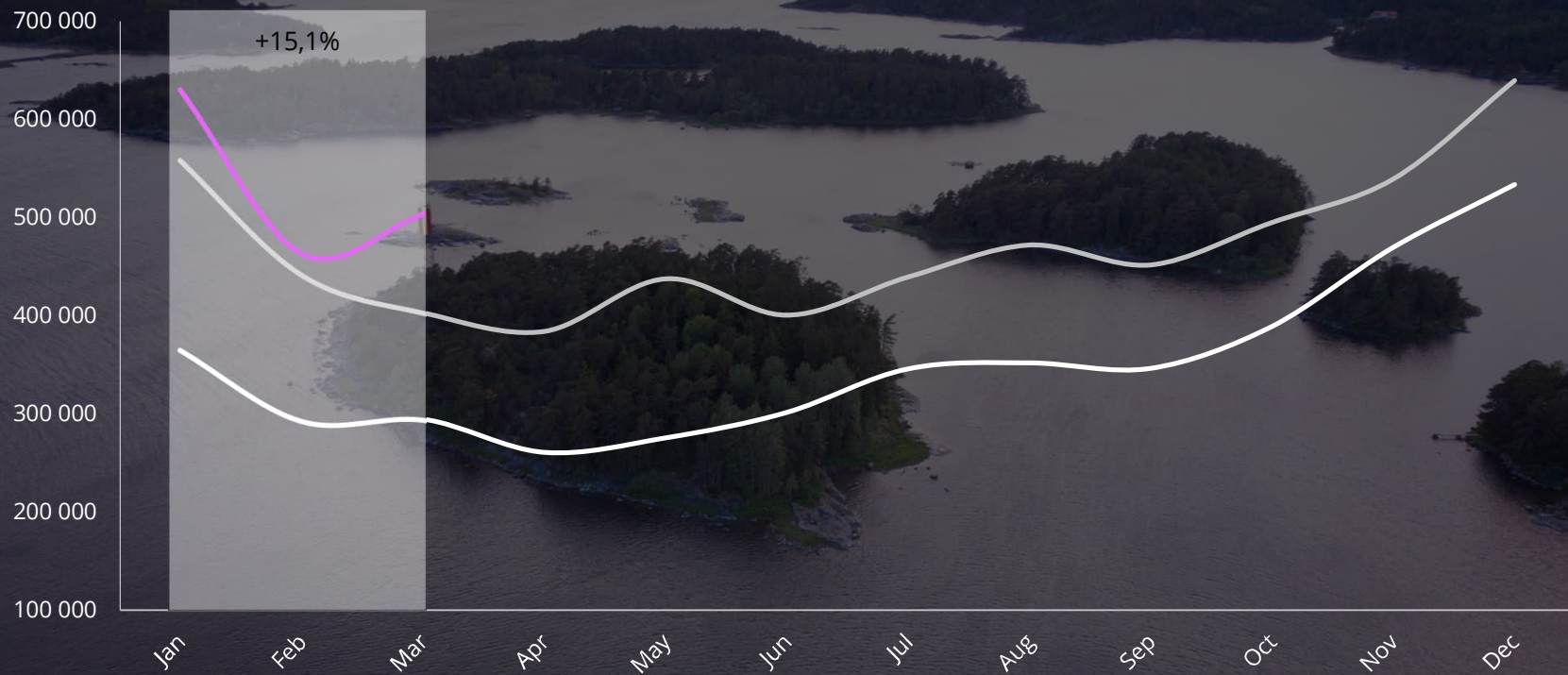
Seasonality Finland international

■ 2019 ■ 2022 ■ 2023



Seasonality Finland international

■ 2019 ■ 2022 ■ 2023



List of the Top 15 Micro-Brandtags in Q1 2023

Top 15 Micro-Brandtags for Finland

Searches Q1 2023, growth of searches Q1 2023 vs Q1 2022

Micro-Brandtags	Searches	Growth
1. Saunas	206K	+5,7%
2. Cities	127K	+7,3%
3. Northern Lights	114K	+8,3%
4. Travel	90K	-18,0%
5. Hotels	84K	+101,3%
6. Skiing	60K	+66,4%
7. Places to Visit	52K	+26,8%
8. Tourism	52K	+17,9%
9. Glass Cabins	48K	+7,5%
10. Vacation Packages	44K	+49,7%
11. Holiday Packages	42K	+26,9%
12. Things to Do	32K	+43,5%
13. Lakes	30K	-1,6%
14. Santa Claus	29K	+43,1%
15. Ice Hotels	29K	+40,6%

#Conclusion 7

Germany remains market #1,
followed by the USA.

Top Target Markets in Q1 2023

Target Markets of Finland

Searches Q1 2023, growth of searches Q1 2023 in comparison to Q1 2022

#	Target Market	Searches	Growth
1	 Germany	205K	+22,5%
2	 United States	171K	+18,3%
3	 Japan	161K	+27,5%
4	 United Kingdom	113K	+9,7%
5	 Italy	85K	+9,6%
6	 France	82K	+9,1%
7	 Spain	66K	+14,0%
8	 India	53K	+28,9%
9	 Netherlands	49K	-19,7%
10	 Estonia	46K	-4,7%

#	Target Market	Searches	Growth
11	 Canada	43K	+24,1%
12	 Switzerland	42K	+12,4%
13	 Sweden	40K	+12,2%
14	 Austria	32K	+19,5%
15	 Australia	28K	+59,2%
16	 Belgium	23K	-4,1%
17	 South Korea	14K	+26,2%

Top Target Markets in Q1 2023 are led by Germany, the USA and Japan

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Long haul markets are showing the most growth

Target Markets of Finland

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Smaller, European markets searched less than a year ago

Target Markets of Finland

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Question 3

Is the touristic trend for Finland the same as for Finnish regions?

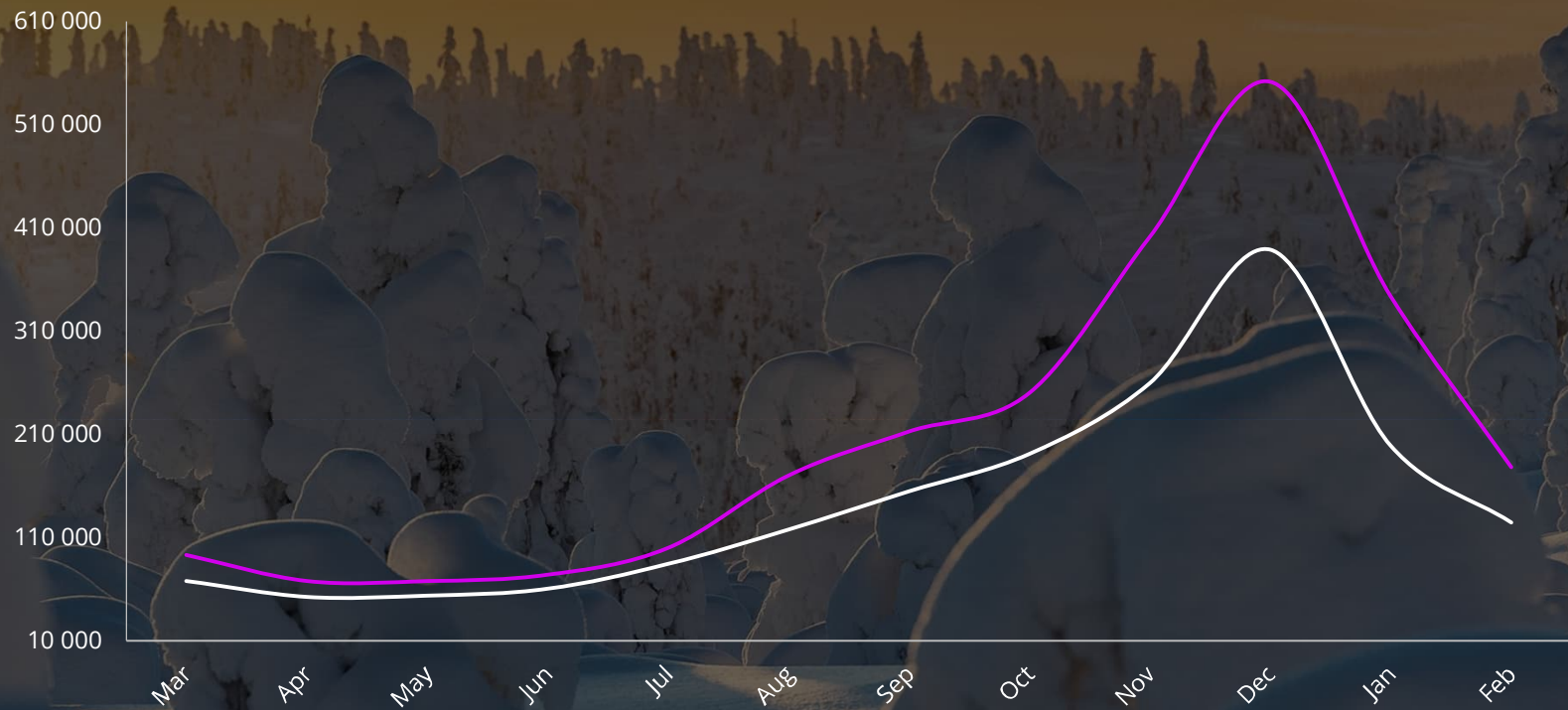


#Conclusion 8

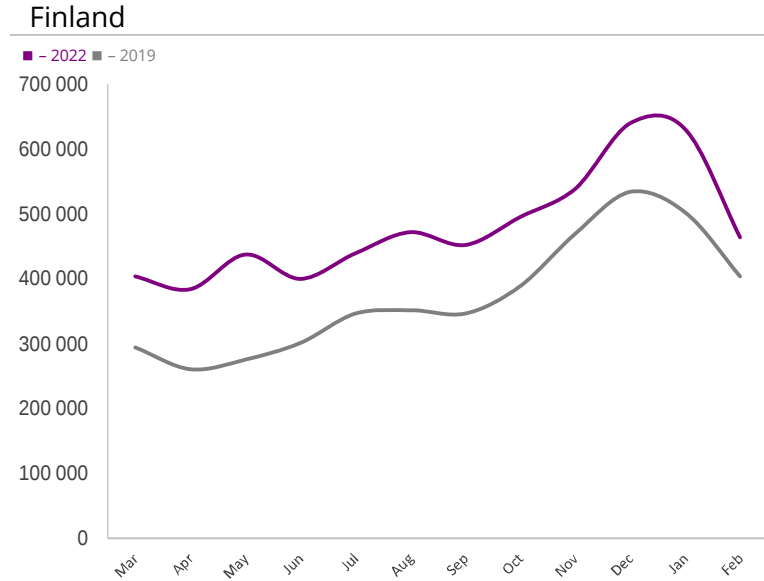
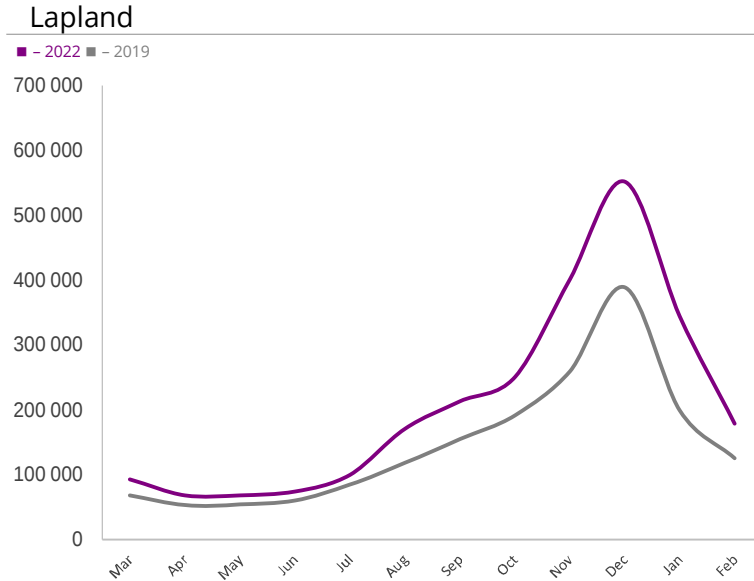
No! Lapland is showing an even stronger winter seasonality than Finland.

Lapland's seasonality

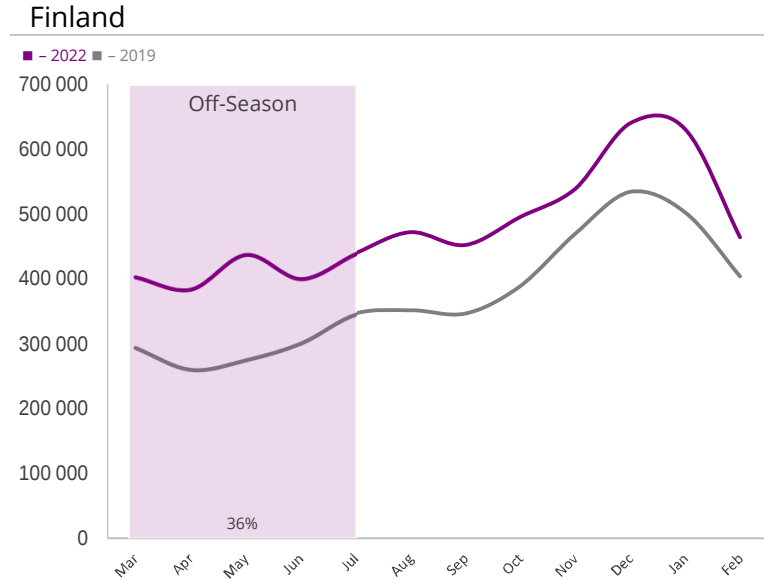
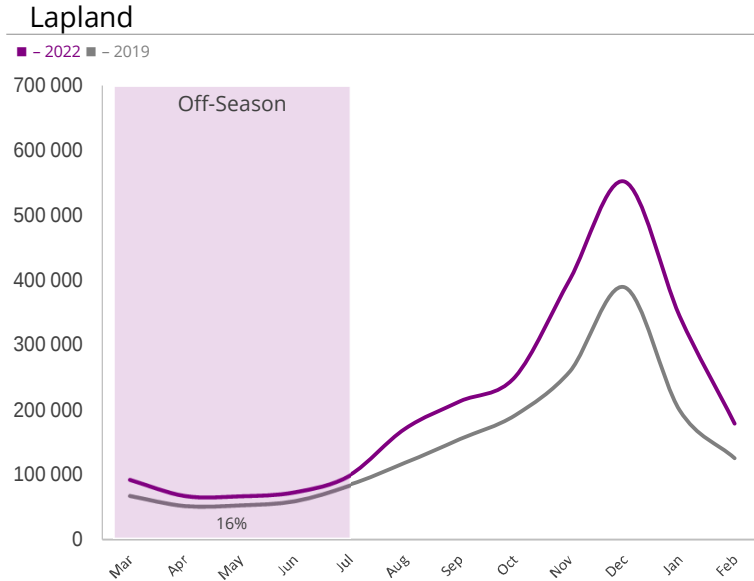
■ 2019 ■ 2022



Seasonality of Lapland and Finland



Seasonality of Lapland and Finland



#Conclusion 9

International tourists search more generic terms when searching for Lapland.

Tourists search mainly for information related to travel and holiday packages in Lapland

Top 15 Micro-Brandtags for Lapland

Searches 2022

Micro-Brandtags	Searches
1. Travel	554K
2. Holiday Packages	538K
3. Santa Claus	241K
4. Northern Lights	191K
5. Vacation Packages	125K
6. Hotels	119K
7. Skiing	57K
8. Glass Cabins	40K
9. Day Trips	39K
10. Ice Hotels	39K
11. Safari	38K
12. Tours	37K
13. Things to Do	32K
14. Reindeers	28K
15. Cities	27K

List of the Top 15 Micro-Brandtags for Lapland and Finland in 2022

Top 15 Micro-Brandtags for Lapland

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Micro-Brandtags	Searches
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Top 15 Micro-Brandtags for Finland

Searches 2022

Micro-Brandtags	Searches
1. Saunas	749K
2. Cities	468K
3. Northern Lights	360K
4. Travel	336K
5. Hotels	290K
6. Places to Visit	197K
7. Tourism	189K
8. Santa Claus	181K
9. Glass Cabins	174K
10. Holiday Packages	144K
11. Lakes	127K
12. Travel Restrictions	122K
13. Vacation Packages	117K
14. Things to Do	100K
15. Skiing	97K

List of the Top 15 Micro-Brandtags for Lapland and Finland in 2022

Top 15 Micro-Brandtags for Lapland

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Top 15 Micro-Brandtags for Finland

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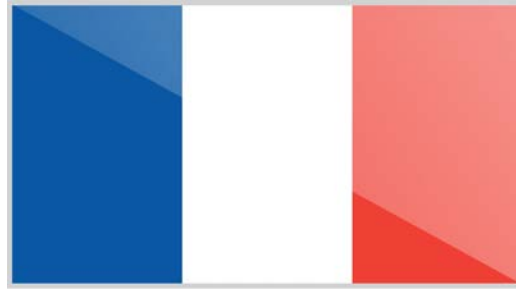
#Conclusion 10

Lapland's top markets differ
from Finland's.

Top target markets Lapland



United Kingdom



France



Germany

The UK and France are the leading international markets for Lapland in 2022

Top Target Markets of Lapland

Searches Mar 2022 – Feb 2023, growth in comparison to Mar 2021 – Feb 2022

#	Target Market	Searches	Growth	Tier I
1	 United Kingdom	556K	30,8%	
2	 France	440K	41,6%	
3	 Germany	267K	67,3%	
4	 Netherlands	224K	6,5%	
5	 Spain	191K	1,9%	
6	 Italy	186K	12,9%	
7	 Belgium	105K	21,3%	
8	 Switzerland	66K	38,0%	
9	 United States	61K	29,9%	
10	 Norway	17K	60,0%	

The UK and France are the leading international markets for Lapland in 2022, followed by Germany

Top Target Markets of Lapland

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International markets for Lapland in 2022

Top Target Markets of Lapland

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Conclusions

1. Nordic countries gain the best results in their history.
2. So does Finland!
3. Finland has a strong and established “touristic” image.
4. Germany is target market #1 for Finland.
5. Finnish tourists developed an appetite for domestic travel, but restrictions coming to an end slowly decreased it again.

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Thank you!

Olga Nowak
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@bloomconsult

A smiling woman with dark hair is looking at a laptop screen. The background is blurred, showing an indoor setting.

Thank you!

Digital Demand Research by Bloom Consulting



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