

Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q1

Version 1.0

May 4th, 2022



**Funded by
the European Union**
NextGenerationEU

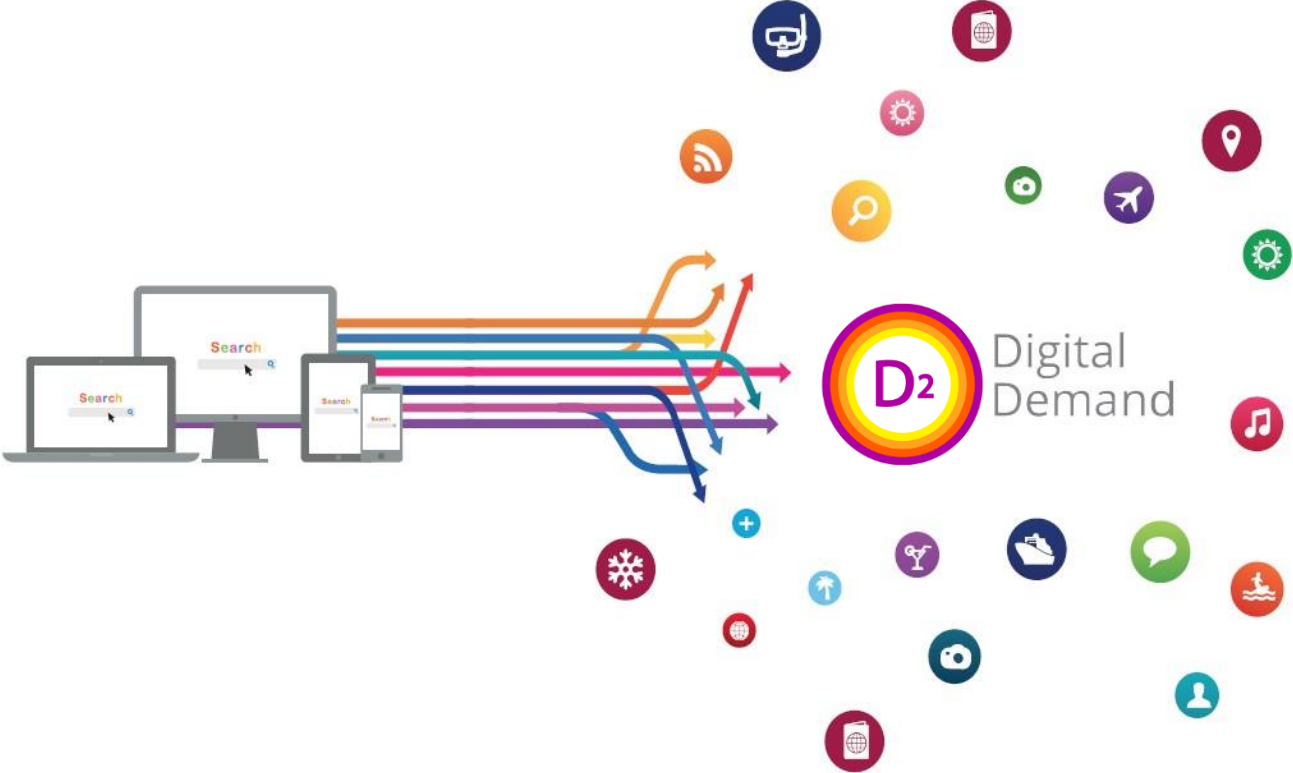
Introducing Digital Demand

The data collected from the D2 - Digital Demand © tool provides an understanding of the international demand for a specific Country, Region, or City. This information is obtained from analysing the specific keywords that global citizens use on the most popular search engines worldwide.

According to the ideology presented by D2 - Analytics, when someone searches for information about a Country, Region, or City, the "search engine" is one of the primary sources used today. Researchers, travellers, investors, professionals, and more, use search engine results to inform their decisions about the next steps in these areas.

Prior to analysing the data in the D2 - Digital Demand © software, please consider that the nature of the results is mainly focused on the total searches performed online by global citizens.

Source of keywords in the D2 - Digital Demand © software



Scope of the project

The “Insight+” solution is prepared for *Visit Finland*, to reflect the international appeal of Finland within the *Tourism* dimension.

Tourism dimension is defined by 274 unique search tags (Micro-Brandtags), reflecting a wide scope of a potential touristic searches from *Generic Information* through *Accommodation* and specific *Tourism Attractions*.

Time range for the project includes quarterly data refresh from January to December 2022, and baseline searches for the previous 3 years (2019 – 2021)

There are 19 international target markets (Germany, United States, Japan, United Kingdom, Italy, France, Spain, Netherlands, Estonia, India, Switzerland, Canada, Sweden, Austria, Belgium, China, Australia, South Korea, and Russia) and the Domestic market (Finland), detailed for their searches, Brandtags popularity, seasonality and the rank of importance.

Subscription details

Type of Subscription

The “**Insight+**” solution is prepared for *Visit Finland*, to reflect the global appeal of Finland within the *Tourism* dimension.

Destination (1):	Finland
Dimension (1):	Tourism
Time Range (3 years):	January to December 2019 – January to December 2021
Refresh (1 year):	Q1, Q2, Q3 and Q4 2022
Languages (22):	Arabic, Chinese, German, Danish, Estonian, English, Spanish, Finnish, French, Indonesian, Italian, Japanese, Korean, Lithuanian, Dutch, Norwegian, Polish, Portuguese, Russian, Swedish, Turkish, and Vietnamese

The subscription includes:

(a) Overview of Finland’s [D2© Summary](#) with number of searches, evolution, seasonality of searches, ranking in the region, most popular Brandtags, and target markets.

(b) In-depth analysis of Finland’s [ALL Brandtags Families](#) (dynamic cards), featuring the number of searches, rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets. Detail of Brandtag Families (3).
For further details please check the Brandtag Classification chapter

(c) In-depth analysis of Finland’s [ALL Brandtags](#) (dynamic cards), featuring the number of searches, rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets. Detail of Brandtags (69).
For further details please check the Brandtag Classification chapter

(d) In-depth analysis of Finland’s [ALL Micro-Brandtags](#) of your choice (dynamic cards), featuring the number of searches, evolution, seasonality, and target markets. Detail of Micro-Brandtags (274).
For further details please check the Brandtag Classification chapter

(e) Overview of Finland’s [20 Target Markets](#) of your choice (dynamic cards), featuring the number of searches, evolution, rank of importance, evolution, top Brandtag popularity, and seasonality. Detail of Target Markets: Germany, United States, Japan, United Kingdom, Italy, France, Spain, Netherlands, Estonia, India, Switzerland, Canada, Sweden, Austria, Belgium, China, Australia, South Korea, Russia, and Domestic (Finnish) market.

(f) Overview of the [4 Competitors](#) of your choice (dynamic cards), with number of searches, evolution, seasonality of searches, ranking in the region, and most popular Brandtags. Detail of Competitors: Denmark, Iceland, Norway, Sweden

Conclusions

Q1 2022 data refresh

Conclusion #1

The analysis framework remains the same: Russia, China and the Rest of the World

The data analysis approach has more importance than ever.

Due to the Ukraine invasion, Google does not disclose data for Russia anymore, and therefore it is not possible to analyse the Russian market until further notice.

"The Rest of the World" is the future and strategic market for Finland in the short-medium term.

China continues with strict restrictions of movement during Q1 2022. The slow recovery forecast is still valid.



Conclusion #2

Finland consolidated the Covid-19 recovery, with stable growth in Q1 2022, ...

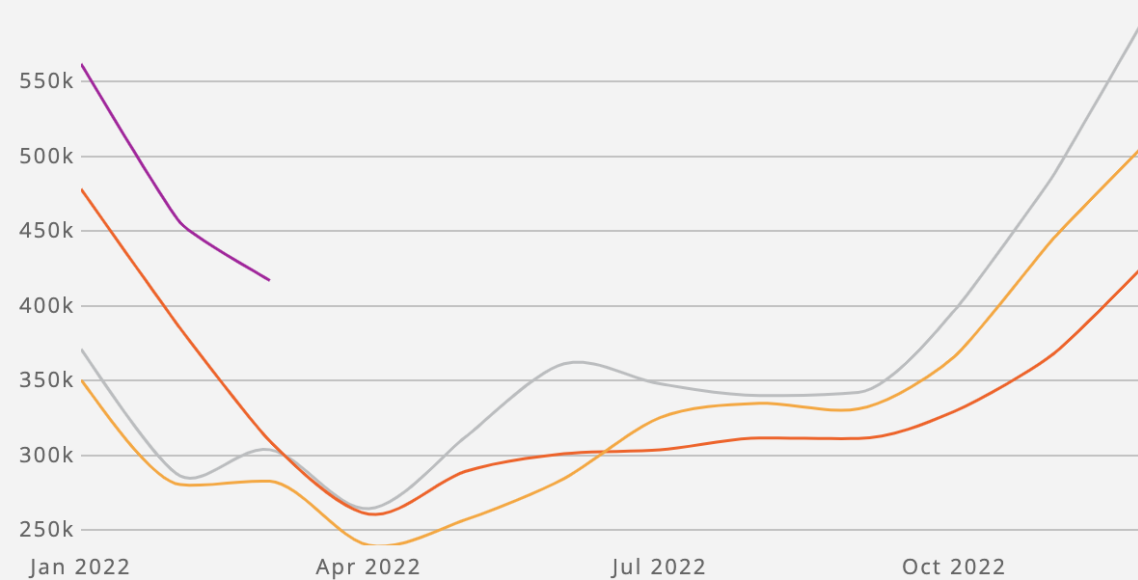
...

Data from Q1 2021 shows a stable and organic growth trend compared to Q1 2020, the last pre-pandemic data series.

The search volume experienced during Q1 2022 is 49% higher compared to the last year period and 22% higher compared to Q1 2020.

Seasonality of searches for Finland

● Jan - Dec 2022 ● Jan - Dec 2021
● Jan - Dec 2020 ● Jan - Dec 2019



Conclusion #3

The Ukraine invasion is having a visible initial impact on Finland's tourist demand, ...

So far, the Ukraine invasion impact can only be captured as for March 2022, marking the beginning of the war.

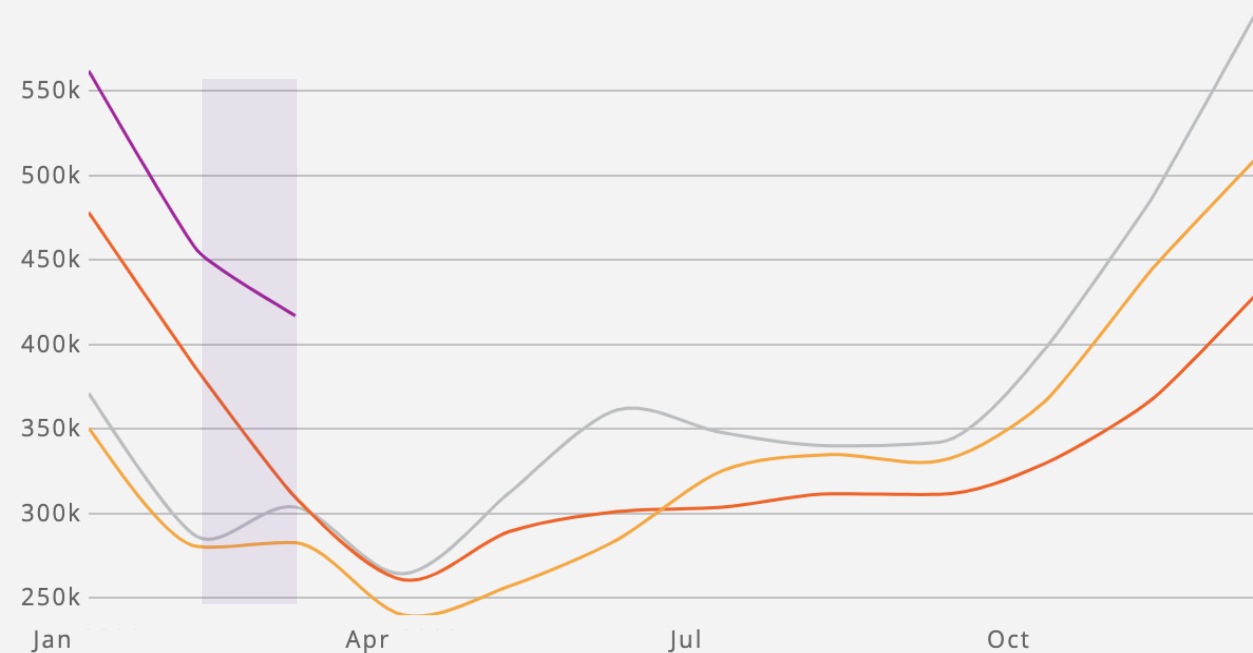
Since March 2020 is the beginning of Covid-19, the data of March 2022 should be compared to the same period of 2021 and 2019 to follow the seasonality trend and to make an accurate analysis.

At the beginning of 2022, searches follow the normal seasonal trend and grow compared to the previous years. However, in March 2022, the volume of searches decreases by 19% while in 2019 and 2021 there is a growth at the time.

The impact of the war is to be confirmed during the following months. It is yet to soon to make predictions based on March data, as other factors may also impact the searches such as 2020 recovery and seasonality.

Seasonality of searches for Finland

● Jan - Dec 2022 ● Jan - Dec 2021
● Jan - Dec 2020 ● Jan - Dec 2019



Conclusion #4

Germany consolidates its position as the main target market for Finland









Germany leads the ranking for the international target markets distribution with 167K searches. It corresponds to 11% of the international touristic searches performed towards Finland in 2022. The demand is almost as big as the one from the domestic market of Finland.

The German market strengthens its position with the increase in demand by +51,7% comparing to the previous year (2021).

Germany is followed by the United States (151K searches), and the second tier is formed by Japan (122K) and the United Kingdom (102K).

Target Market Distribution 2022

Rank	Flag	Country	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%
9		Estonia	48,181	26.1%
10		India	39,253	20.4%

Rank	Flag	Country	Searches	Growth
11		Switzerland	37,519	52.4%
12		Canada	37,513	48.7%
13		Sweden	34,369	25.5%
14		Austria	26,874	53.5%
15		Belgium	23,516	46.9%
16		China	19,757	-35.8%
17		Australia	16,941	39.6%
18		South Korea	10,801	8.7%
19		Russia	0	-100.0%

Conclusion #4

Germany consolidates its position as the main target market for Finland, while the Netherlands, the UK and France show high recovery rate.






All international target markets, except for China, increase their demand in Q1 2022.

The markets with the highest demand, the United Kingdom and France, show over 50% of growth, while the Netherlands with the lower demand shows the highest recovery rate of 92% compared to the last year.

Finally, Switzerland, Canada and Australia which are outside the top 10 target markets for Finland, increase approximately by 50% in comparison to the past year (2021).

Target Market Distribution Q1 2021

Rank	Flag	Country	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
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Conclusion #5

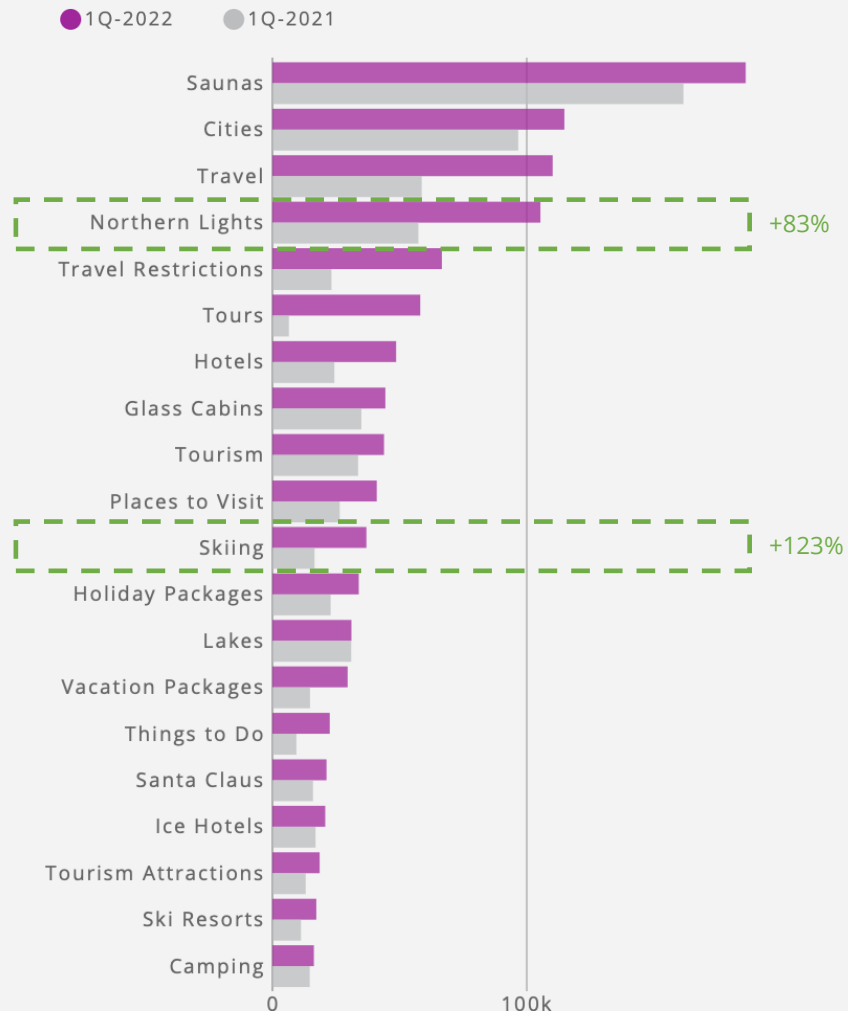
Northern Lights and Skiing show high growth, ...

The majority of the Brandtags for Finland show growth in searches in Q1 2022 comparing to the same period in 2021.

Search for winter activities such as *Northern Lights* and *Skiing* grows by 83% and 123% respectively.

National parks, despite being a low volume Brandtag (5K) grows by 112%. *Cruises* also experiences a strong recovery with 114% growth, though still shows very small demand.

Top 20 Micro-Brandtags for Finland *Internationally*



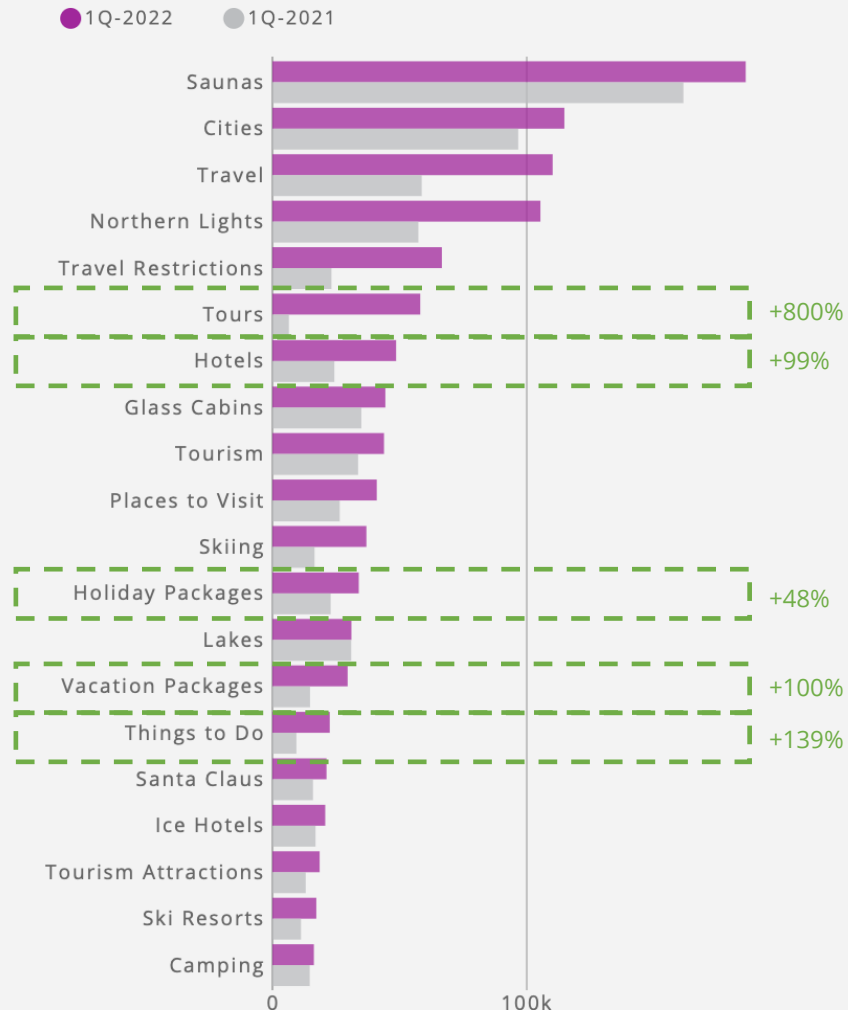
Conclusion #5

Northern Lights and Skiing show high growth, along with other important brandtags such as *Tourism packages, Tours, Hotels and Things to do.*

The international tourist searches grow also for *Hotels* (99%), and for the general information such as *Tourism packages, Holiday Packages* and *Vocational Packages* with average growth of 68% and *Things to Do* (+139%).

Demand for *Tours* in general increases 8 times compared to the respective period of 2021.

Top 20 Micro-Brandtags for Finland *Internationally*

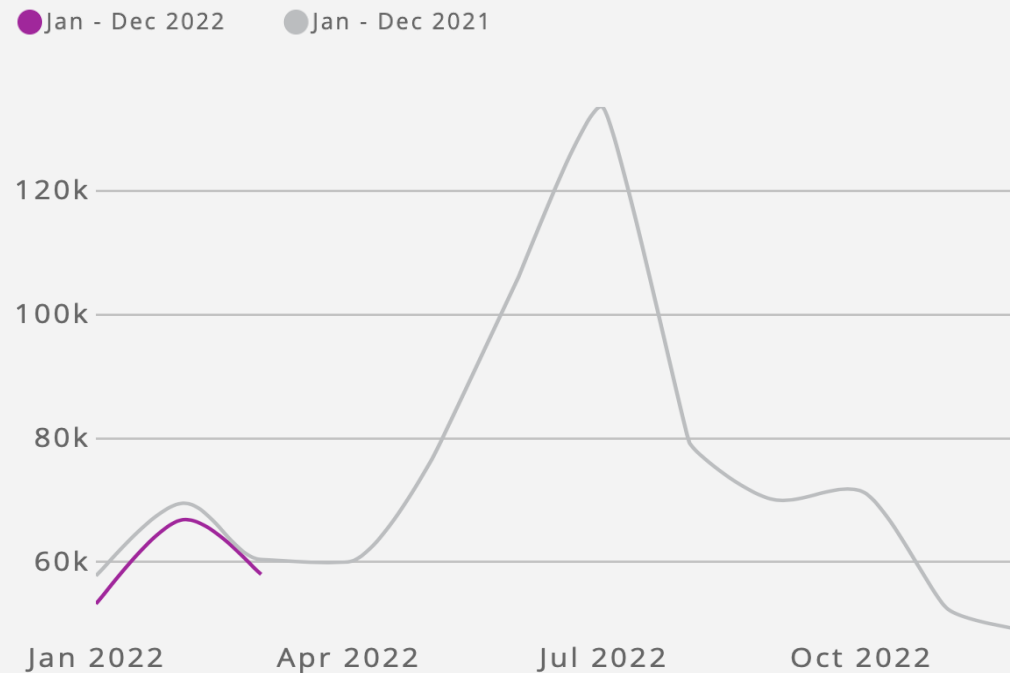


Conclusion #6

The domestic market volume remains high and stable

So far in Q1 2022 Finland domestic market share remains high with over 178k searches, which are only 5% below the 2021 results. This confirms the stability trend of the market.

Seasonality of searches for Finland **Domestic**



Conclusions

- #1 The analysis framework remains the same: Russia, China and the *“Rest of the World”*.
- #2 Finland consolidated the Covid-19 recovery, with stable growth in Q1 2022.
- #3 The Ukraine invasion is having a visible initial impact on Finland’s tourist demand, but not yet visible for the rest of competitors.
- #4 Germany consolidates its position as the main target market for Finland, while the Netherlands, the UK and France show high recovery rate.
- #5 *Northern Lights and Skiing* show high growth, along with other important brandtags such as *Tourism packages, Tours, Hotels and Things to do*.
- #6 The domestic market volume remains high and stable.

Thank you!

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