

Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q3

Version 1.0

November 15th, 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 resources used today. Researchers, travellers, investors, professionals, and other groups use search engine results to inform their decisions on 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.

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

The project timeline includes quarterly data refreshes from January to December 2022, and baseline searches for the previous three years (2019 – 2021).

The 19 international target markets are 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 are covered in terms of searches, Brandtag 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 Q2 2022

- #1 Demand for all the region increased in Q2 2022.
- #2 The initial impact of the invasion of Ukraine on Finland's tourist demand was no longer felt. May peak for Finland.
- #3 The United States became the main target market for Finland in Q2 2022, while long haul markets were showing fast recovery.
- #4 Generic searches, as well as searches for inspiration and outdoor activities continued to grow in volume.
- #5 The domestic market volume started to decrease.

Conclusions

Q3 2022 data refresh

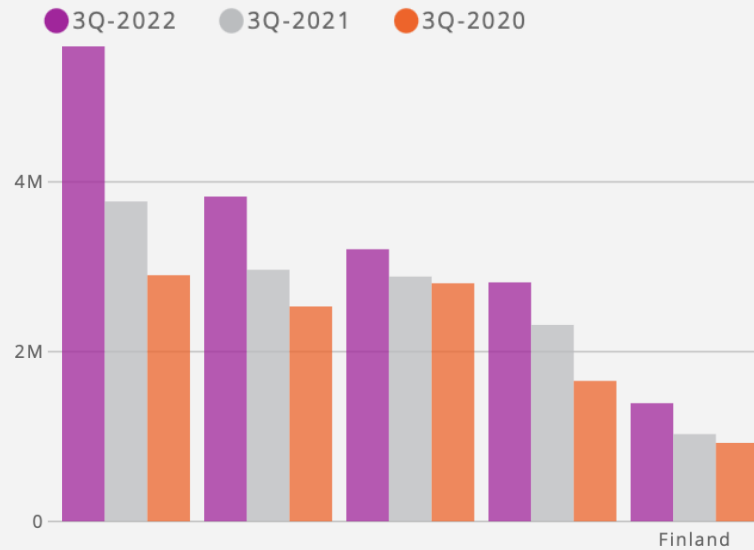
Conclusion #1

Demand is constantly increasing across all countries in Q3 2022

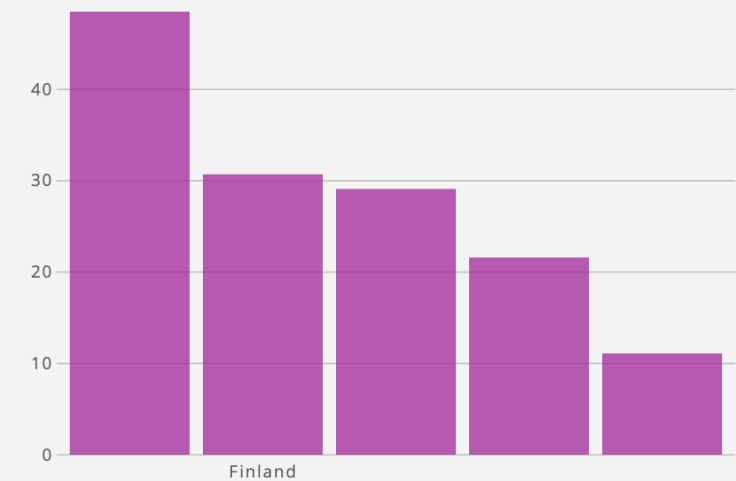
As for the search volumes, the benchmark rank remains the same, Finland with 1,34m searches.

During Q3 2022, all Nordic countries grow by an average of 28,2% compared to the same quarter in 2021.

Benchmark ranking (excluding RU and CN)



Growth %



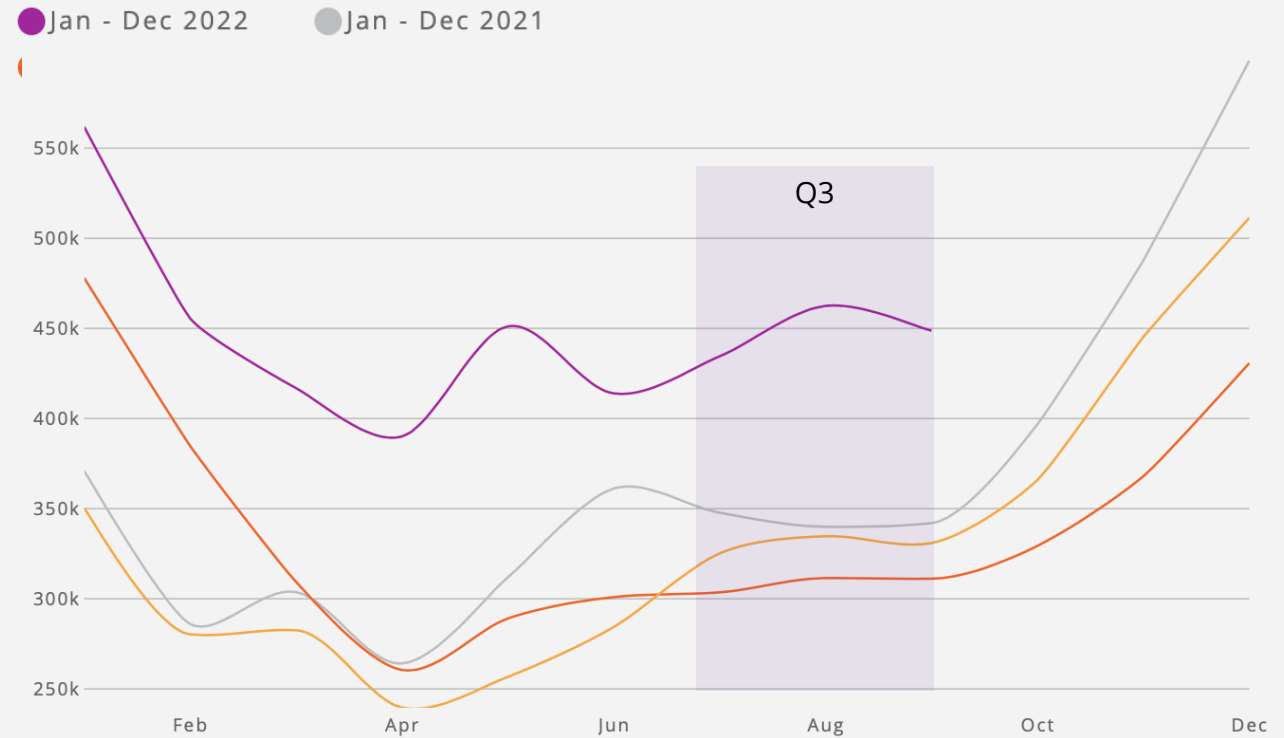
Conclusion #2

Amount of searches for Finland increases in Q3 2022

Data from Q3 2022 shows a search volume increase of 31% compared to the same period last year.

The volume started to increase in July and peaked in August (462K searches), stabilising in September.

Seasonality of searches for Finland



Conclusion #3

Germany becomes main target market for Finland in Q3 2022...

The Top 3 target markets for Finland remain the same but the order has changed again.

With 149K searches Germany leads the ranking among international markets. The German market gained its position with a 30,9% increase in demand compared to the previous year (Q3 2021).

Germany is followed closely by Japan (142K) and the United States (128K) in the first tier, and the United Kingdom (86K), Italy (67K), France (65K), and Spain (60K) as second tier markets. The order of second tier countries remains the same as it was in Q2 2022.

Target Market Distribution Q3 2022

Rank	Flag	Country	Searches	Growth
1		Germany	149,054	30.9%
2		Japan	142,248	18.7%
3		United States	128,003	22.7%
4		United Kingdom	86,359	20.8%
5		Italy	67,252	17.1%
6		France	65,799	32.0%
7		Spain	60,385	30.4%
8		Estonia	46,635	-2.1%
9		Sweden	43,794	32.5%
10		India	38,296	18.0%

Rank	Flag	Country	Searches	Growth
11		Netherlands	34,283	-14.5%
12		Canada	32,778	29.5%
13		Switzerland	30,061	10.6%
14		Austria	22,641	18.3%
15		Australia	21,661	62.6%
16		China	19,901	9.0%
17		Belgium	17,806	11.0%
18		South Korea	15,681	50.4%
19		Russia	0	-100.0%

Conclusion #3

Germany becomes main target market for Finland in Q3 2022, while long haul markets continue fast recovery

English-speaking markets continue with an amazing growth in demand. Australia is the fastest growing international target market for Finland with an increase of almost 63%, and Canada comes in with +29,5%.

Another long haul market, which is growing fast despite the low volume of searches is South Korea with an increase of over 50% in Q3 2022.

The majority of European markets show an increase in the number of searches in Q3 2022, with the exception of Estonia (-2,1%) and the Netherlands (-14,5%).

Finally, for the first time last month, China is showing signs of increase in demand (+9,0%).

Target Market Distribution Q3 2022

Rank	Flag	Country	Searches	Growth
1		Germany	149,054	30.9%
2		Japan	142,248	18.7%
3		United States	128,003	22.7%
4		United Kingdom	86,359	20.8%
5		Italy	67,252	17.1%
6		France	65,799	32.0%
7		Spain	60,385	30.4%
8		Estonia	46,635	-2.1%
9		Sweden	43,794	32.5%
10		India	38,296	18.0%

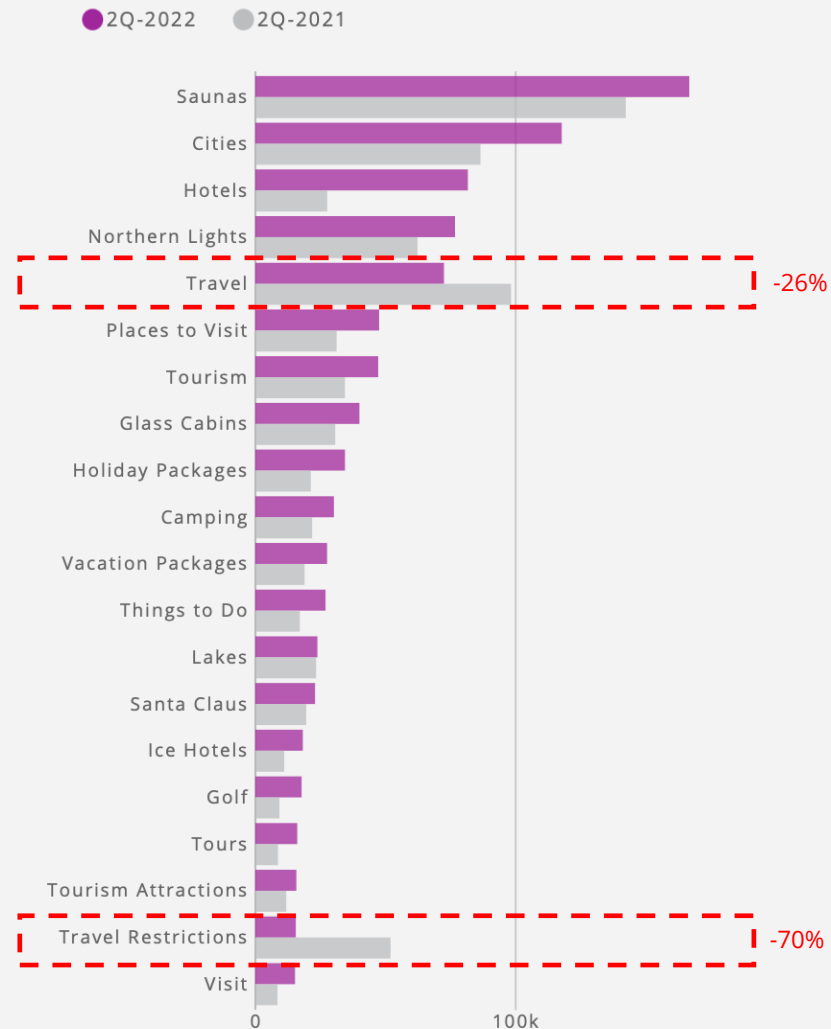
Rank	Flag	Country	Searches	Growth
11		Netherlands	34,283	-14.5%
12		Canada	32,778	29.5%
13		Switzerland	30,061	10.6%
14		Austria	22,641	18.3%
15		Australia	21,661	62.6%
16		China	19,901	9.0%
17		Belgium	17,806	11.0%
18		South Korea	15,681	50.4%
19		Russia	0	-100.0%

Conclusion #4

Total searches continue to grow, while number of searches related to restrictions starts to decrease

The majority of the top Micro-Brandtags for Finland show growth in the number searches in Q3 2022 compared to the same period in 2021, with the exception of *Travel* and *Travel Restrictions*.

Top 20 Micro-Brandtags for Finland *Internationally*



Conclusion #4

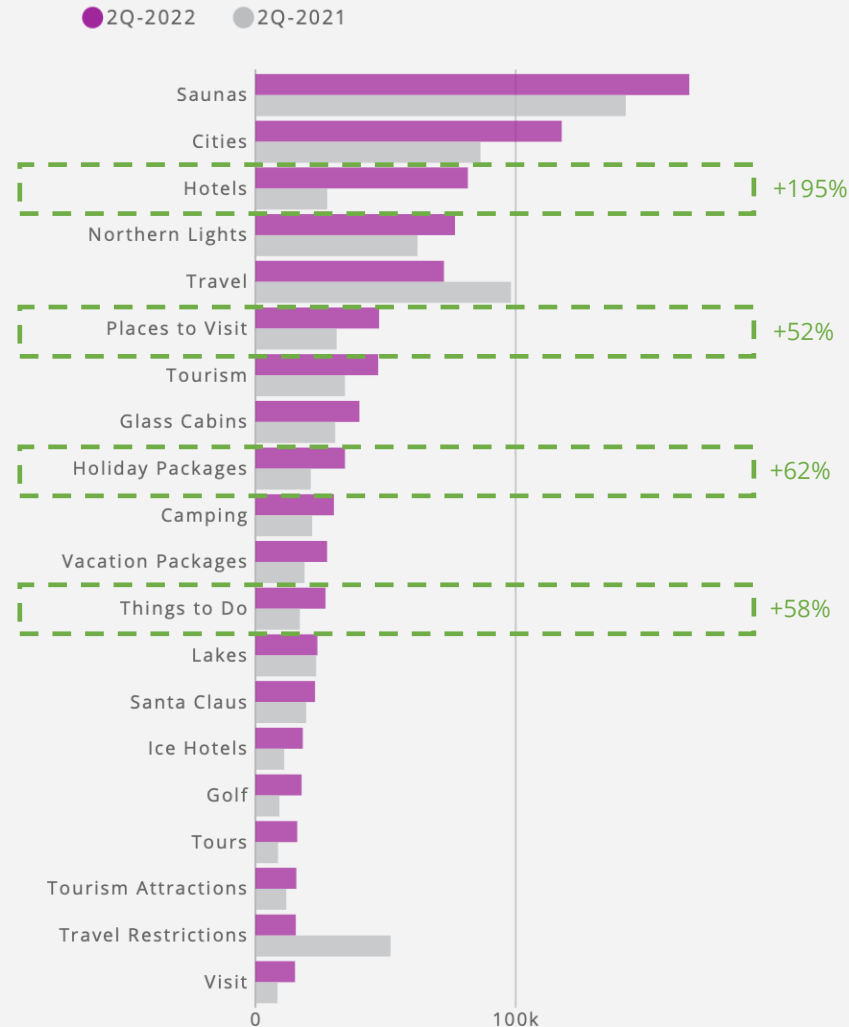
Total searches continue to grow, while number of searches related to restrictions starts to decrease

The majority of the top Micro-Brandtags for Finland show growth in the number of searches in Q3 2022 compared to the same period in 2021, with the exception of *Travel* and *Travel Restrictions*.

The amount of international tourist searches has grown significantly for *Hotels* (195%) and general information, such as *Places to Visit* (+52%), *Holiday Packages* (+62%) and *Things to Do* (+58%).

Accommodation related Micro-Brandtags such as *Glass Cabins* and *Camping* report an increase in demand of over 30%.

Top 20 Micro-Brandtags for Finland *Internationally*



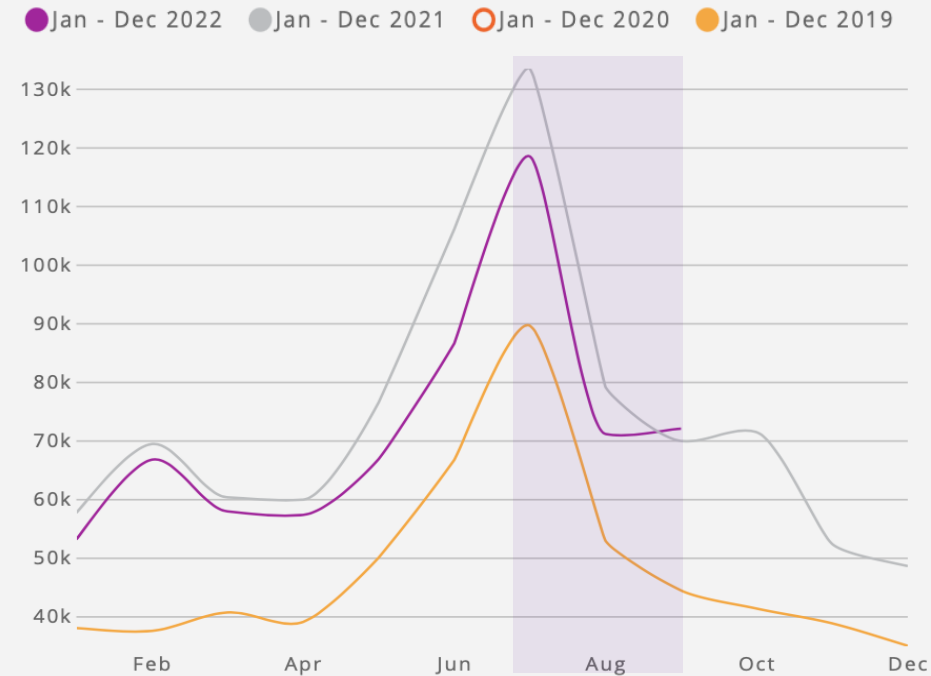
Conclusion #5

The domestic market volume continues to fall below 2021 levels, reconfirming post-pandemic behaviour

The gap in volume in Q3 2022 and the same period the year before is similar to what was seen in Q2. With over 261K searches, the domestic market of Finland is now 7,4% below the 2021 results.

However, the volume is still approximately 40% higher than it was before the pandemic.

Seasonality of searches for Finland **Domestic**



Conclusions Q3 2022

- #1 Demand is constantly increasing across all countries in Q3 2022.
- #2 Finland is experiencing an increase in search volume in Q3 2022.
- #3 Germany becomes the main target market for Finland in Q3 2022, while long haul markets continue fast recovery.
- #4 Total searches continue to grow, while the number of searches related to restrictions starts to decrease.
- #5 The domestic market volume continues to fall below 2021 levels, reconfirming post-pandemic behaviour.

Thank you!

Gonzalo Vilar
Partner and Place Analytics Director
gvilar@bloom-consulting.com

@bloomconsult

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