

# Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q1

Version 1.0

April 28<sup>th</sup>, 2023



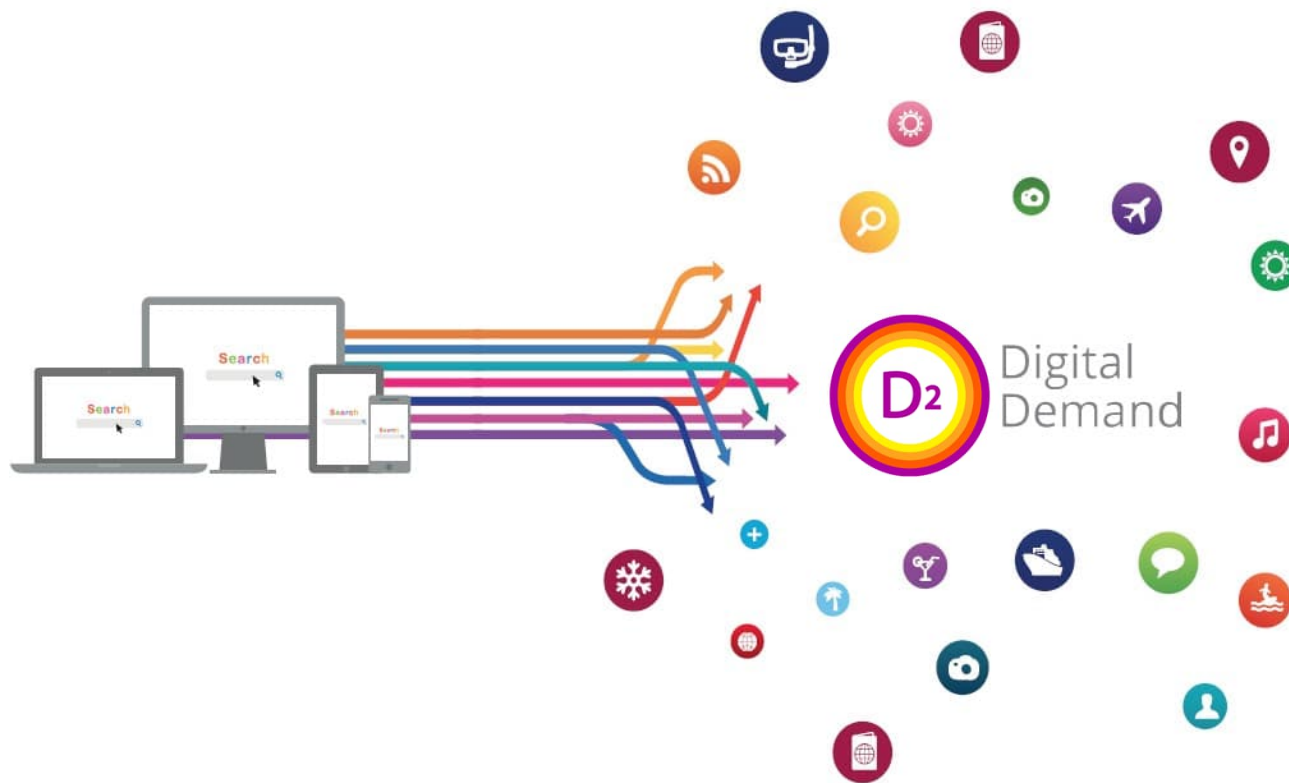
# Introducing Digital Demand

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 analyzing 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, travelers, investors, professionals, and other groups use search engine results to inform their decisions on the next steps in these areas.

Prior to analyzing 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 276 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 2023, and baseline searches for the previous two years (2021–2022).

The 19 international target markets of Germany, the United States, Japan, the United Kingdom, Italy, France, Spain, the Netherlands, Estonia, India, Switzerland, Canada, Sweden, Austria, Belgium, China, Australia, South Korea, and Russia) and the domestic market of Finland are covered in terms of searches, Brandtag popularity, seasonality, and the rank of importance.

## Subscription details

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

Destination (1):	Finland
Dimension (2):	Tourism, Tourism Branded
Time Range (3 years):	January to December 2021 – January to December 2023
Refresh (1 year):	Q1, Q2, Q3 and Q4 2023
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 the following:

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

**(b)** In-depth analysis of Jyväskylä's ALL Brandtags Families (dynamic cards), featuring the number of searches, a rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets.

Detail of Brandtag Families (4).

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, a rank of importance, evolution, Micro-Brandtag share, seasonality, and target markets.

Detail of Brandtags (70).

For further details, please check the Brandtag Classification chapter

**(d)** In-depth analysis of Jyväskylä's ALL Micro-Brandtags of your choice (dynamic cards), featuring the number of searches, evolution, seasonality, and target markets.

Detail of Micro-Brandtags (276).

For further details, please check the Brandtag Classification chapter

**(e)** Overview of Jyväskylä's 20 Target Markets of your choice (dynamic cards), featuring the number of searches, evolution, a 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.

## Conclusions Q4 2022

- #1 Increase in demand from all Nordic countries
- #2 The increase in searches for Finland in Q4 2022 is lower than it was during the rest of the year.
- #3 Searches for Accommodation and Activities continue to grow, while the Travel Micro-Brandtag reflects post-pandemic behavior.
- #4 Germany is once again the main target market for Finland in Q4 2022. The rising stars of 2021 dropped in the ranking. Long-haul markets continue to grow.
- #5 The domestic market volume in Q4 2022 surpasses 2021 levels.

# Conclusions

Q1 2023 data refresh

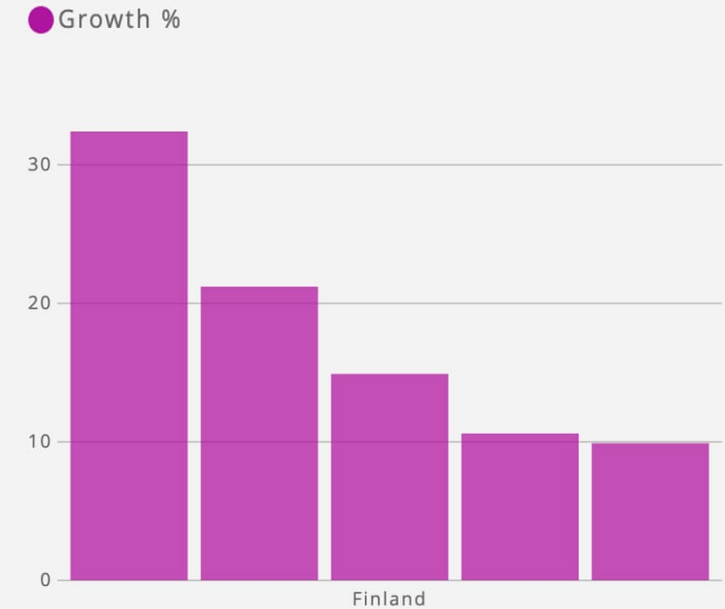
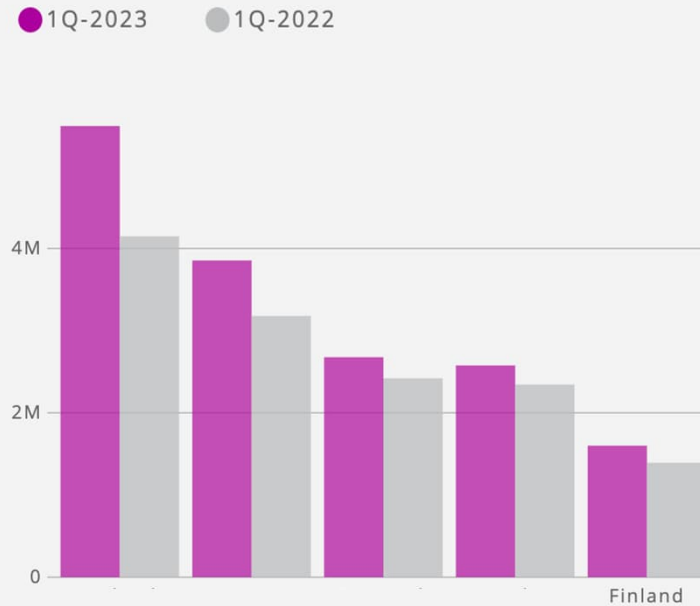
## Conclusion #1

# All Nordic countries continue to grow in Q1 2023, the benchmark remains unchanged.

In terms of search volume, the order of the countries in the benchmark ranking remains the same as in Q1 2022. Finland comes last with 1,6m searches.

During Q1 2023, all countries grew by an average of 18%, compared to the same quarter in 2021, Finland with 15% growth.

Benchmark ranking (excluding RU and CN)



## Conclusion #2

# Finland recovers March search volume in 2023.

Data from Q1 2023 shows an increase of 15% in search volume since the same period last year.

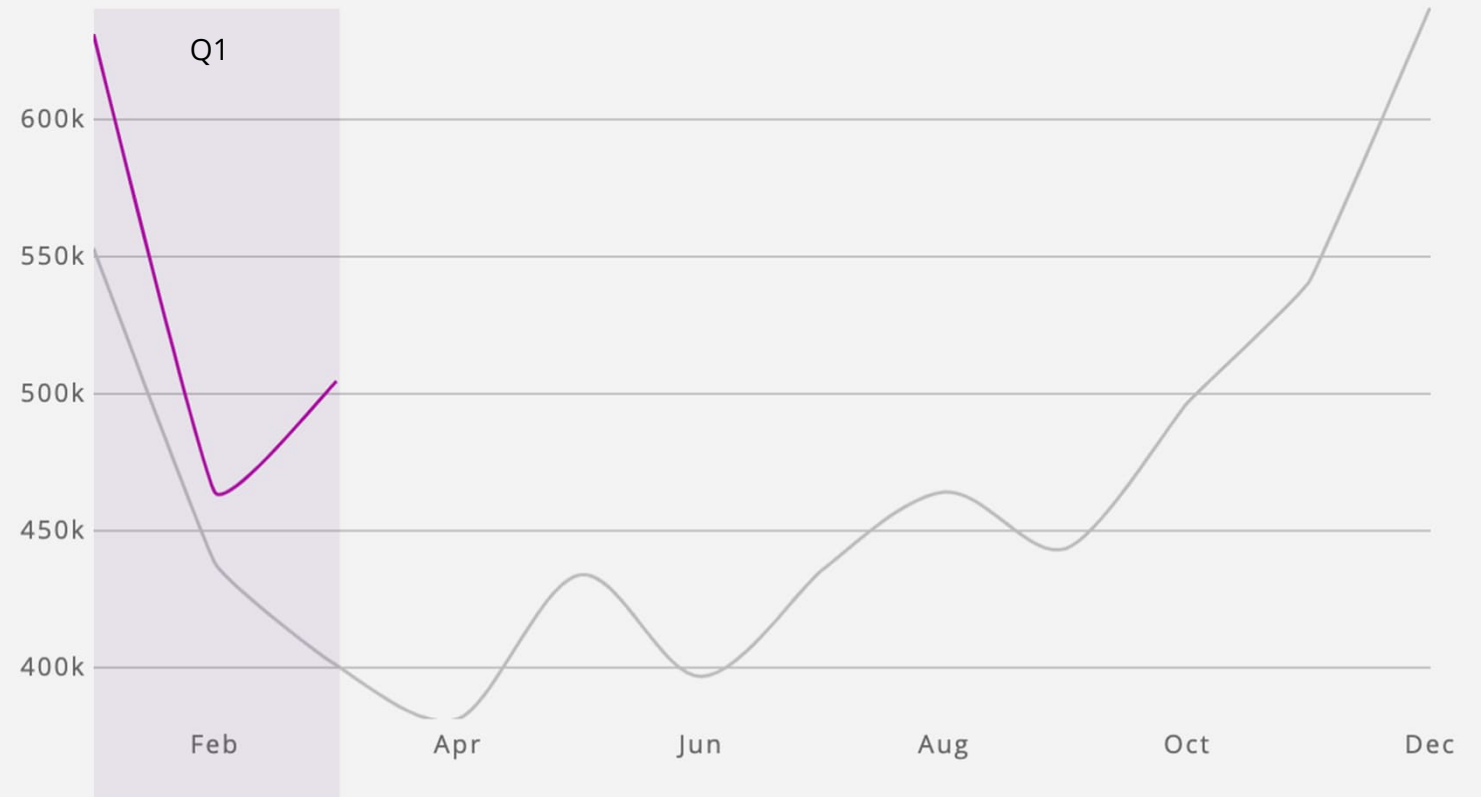
The search volume in Q1 2023 is constantly greater than the volume during the same period in 2022. Seasonality-wise, international tourists show a similar search behavior until February.

However, in March 2023, the search volume increased, showing recovery from the decrease noted at the beginning of the Russia-Ukraine war, in March 2022, in relation to the proximity of the Finnish border.

Seasonality of searches for Finland

● Jan - Dec 2023

● Jan - Dec 2022



## Conclusion #3

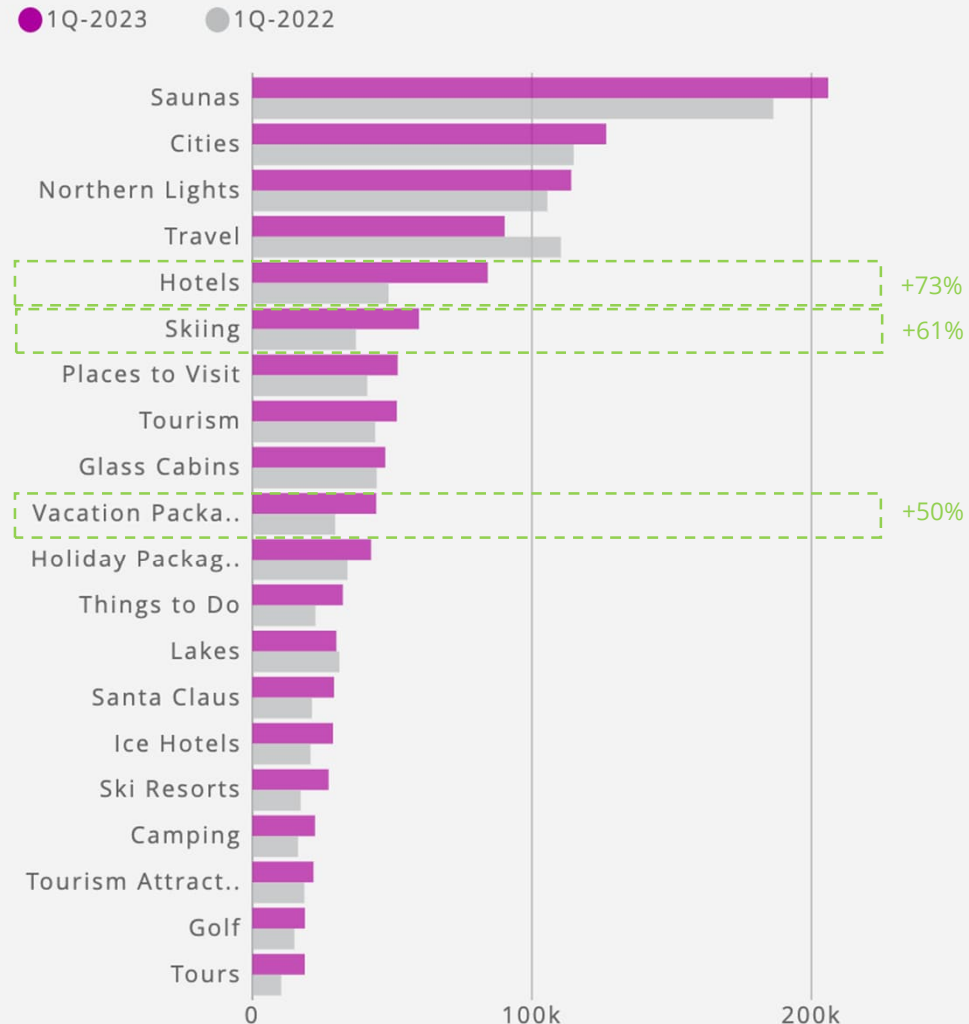
# Searches for Accommodation, Skiing and Vacation Packages grow, ...

The majority of the top Micro-Brandtags for Finland show growth in search volume in Q1 2023, compared to the same period in 2022.

With 206K searches, Saunas is by far the most searched theme. Next up but considerably further down in the ranking, Cities (127K) and Northern Lights (114K) are among the most searched topics by international travelers.

Regarding growth since last year, international tourist searches have grown significantly for Hotels (+73%), Skiing (+61%) and information associated with Vacation Packages (+50%).

Top 20 Micro-Brandtags for Finland *Internationally*



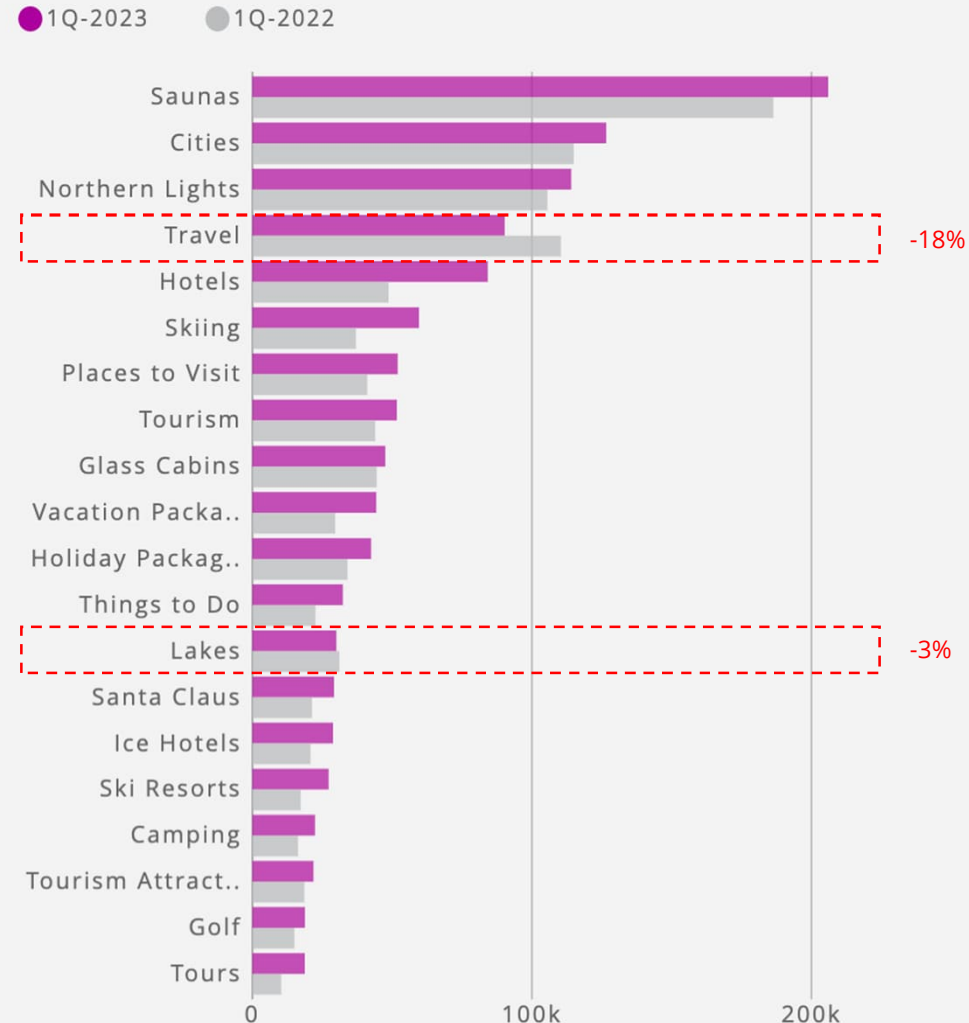


## Conclusion #3

# Searches for Accommodation, Skiing and Vacation Packages grow, while Travel-related searches decrease and searches for Lakes stabilize.

The volume of searches for general information regarding Travel has decreased by 18%. International tourists' interest in Lakes is also down, reporting a decrease of 3%.

Top 20 Micro-Brandtags for Finland *Internationally*



## Conclusion #4

# Germany remains the main target market for Finland in Q1 2023, ...

Germany, the United States and Japan hold onto their spots in the Top 3 in the same order as in Q1 2022. However, the order has changed since Q4 2022 when Japan was the leader, with Germany and the United States close behind.

With 205,2K searches, Germany leads the international target market distribution ranking. It held onto the same position it had in Q1 2022 and showed a 22,6% increase in demand.

Germany is followed very closely by the United States (107,6K), Japan (160,7K), and the United Kingdom (113,5K) as first-tier markets.

Italy (84,5K), France (82,2K), and Spain ((65,6K) are second-tier markets. The order of the second-tier markets remains almost the same as in Q4 2022, with Italy and France switching places.

Target Market Distribution Q1 2023

Rank	Flag	Country	Searches	Growth	Rank	Flag	Country	Searches	Growth
1		Germany	205,227	22.6%	11		Canada	43,356	15.0%
2		United States	170,669	12.0%	12		Switzerland	42,446	12.9%
3		Japan	160,780	30.2%	13		Sweden	39,792	15.5%
4		United Kingdom	113,524	10.2%	14		Austria	32,454	20.6%
5		Italy	84,580	9.6%	15		Australia	27,972	63.6%
6		France	82,203	8.7%	16		Belgium	23,274	-1.3%
7		Spain	65,617	15.2%	17		China	21,167	7.0%
8		India	51,819	29.2%	18		South Korea	14,212	28.6%
9		Netherlands	48,495	-11.7%	19		Russia	0	N/A
10		Estonia	46,006	-4.6%					

## Conclusion #4

**Germany remains the main target market for Finland in Q1 2023, while the Dutch and Estonian markets have dropped in the ranking.**

Most European markets showed an increase in searches in Q1 2023, except for the Netherlands (-11,7%) and Estonia (-4,6%).

Demand from long-haul markets is growing rapidly once again, especially from Australia - the fastest growing international target market for Finland. Australia registered an increase of almost 64%. But other long-haul markets too reported an increase in searches in Q1 2023, such as Japan (+30,2%), India (+29,2%), Austria (+20,6%) and South Korea (+28,6%).

Target Market Distribution Q1 2023

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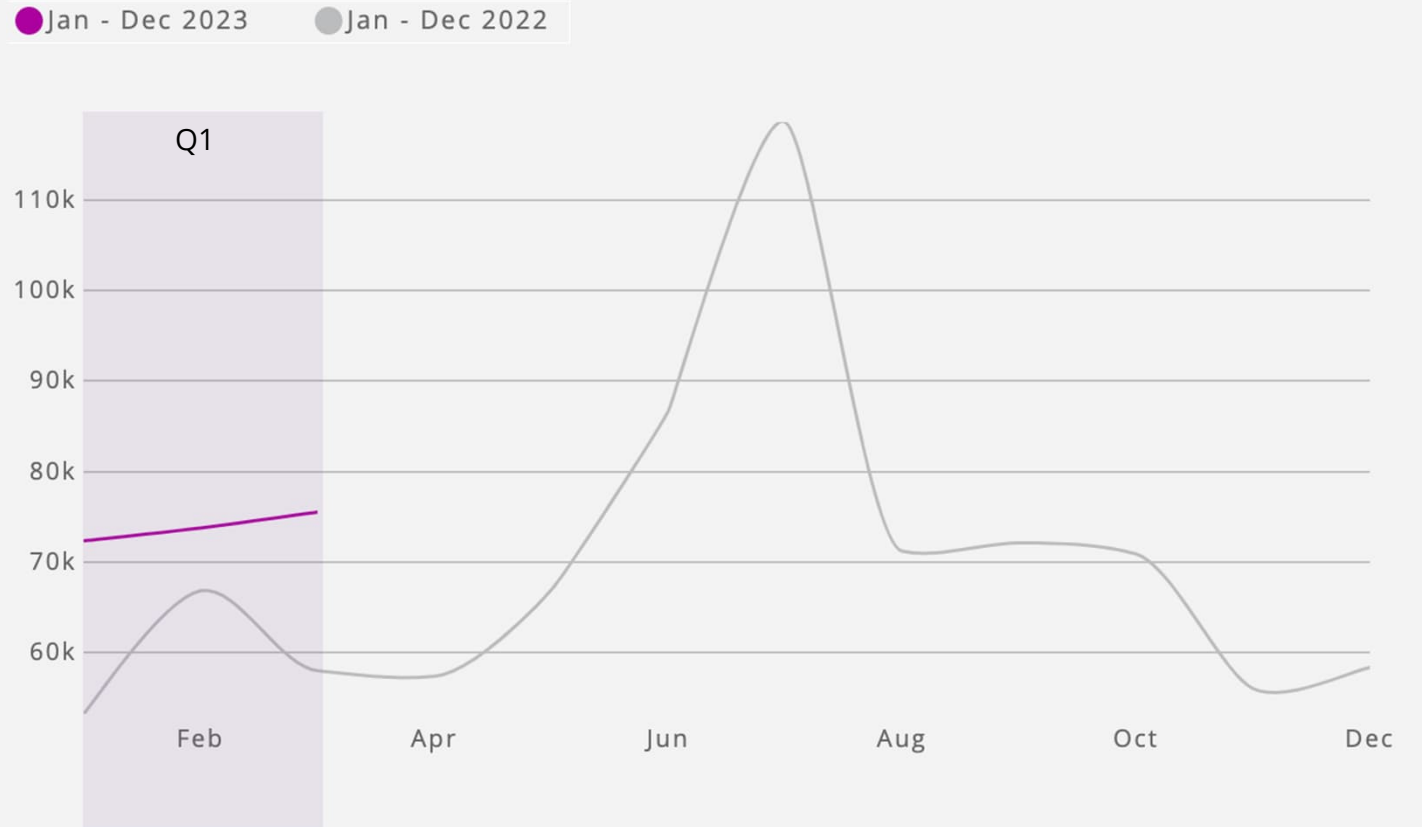
## Conclusion #5

# The domestic market volume in Q1 2023 still surpasses 2022 levels, while Finns' search behavior changes.

With over 221K searches in Q1 2023, the domestic market displayed an increase of 24,44%, compared to Q1 2022.

The increase in demand is visible throughout the whole trimester of 2023, which persistently surpasses 2022 demand, while displaying a constant linear increase, rather than a peak in February.

Seasonality of searches for Finland **Domestic**



## Conclusions Q4 2022

- #1 All Nordic countries continue to grow in Q1 2023.
- #2 Finland recovers March search volume in 2023.
- #3 Searches for Accommodation, Skiing and Vacation Packages grow, while Travel-related searches decrease and searches for Lakes stabilize.
- #4 Germany remains the main target market for Finland in Q1 2023, while the Dutch and Estonian markets have dropped in the ranking.
- #5 The domestic market volume in Q1 2023 still surpasses 2022 levels, while Finns' search behavior changes.

# Thank you!

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