

Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q4

Version 1.0

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Funded by
the European Union
NextGenerationEU

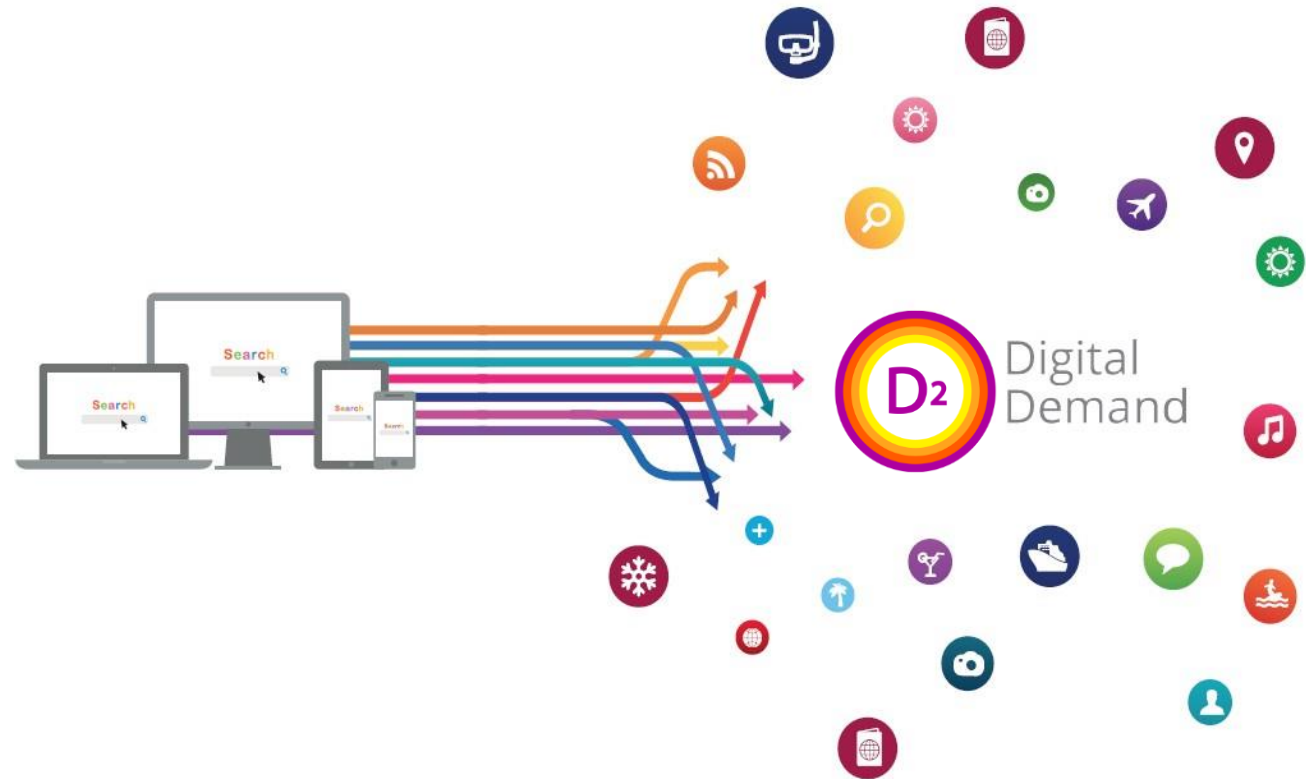
Introducing Digital Demand

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 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 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 Q3 2022

- #1 Demand increased constantly in Q3 2022 from all Nordic countries.
- #2 Searches for Finland increased in Q3 2022.
- #3 Germany became the main target market for Finland in Q3 2022, while long haul markets continued their fast recovery.
- #4 Total searches continued to grow, while the number of searches related to restrictions started to decrease.
- #5 The domestic market volume continued to fall below 2021 levels, reconfirming post-pandemic behaviour.

Conclusions

Q4 2022 data refresh

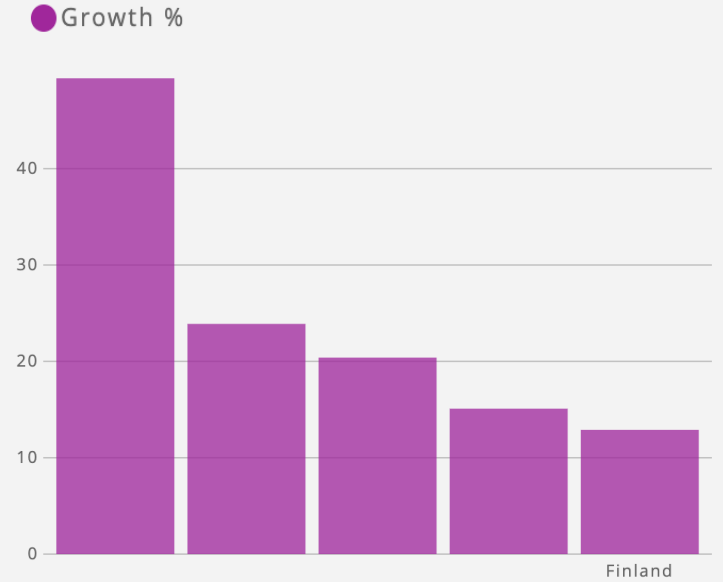
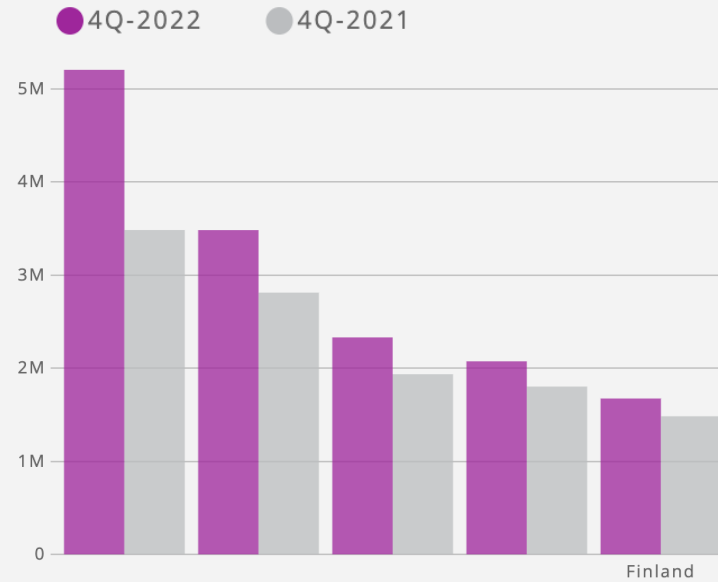
Conclusion #1

Constant demand increase in demand from all Nordic countries

As for search volumes, the order of the countries in the benchmark rank remains the same as in Q4 2021, Finland following other Nordic countries with 1,6m searches.

During Q4 2022, all countries grew by an average of 24%, compared to the same quarter in 2021, Finland with 12,9% growth.

Benchmark ranking (excluding RU and CN)



Conclusion #2

The increase of searches for Finland in Q4 2022 is lower than it was during the rest of the year

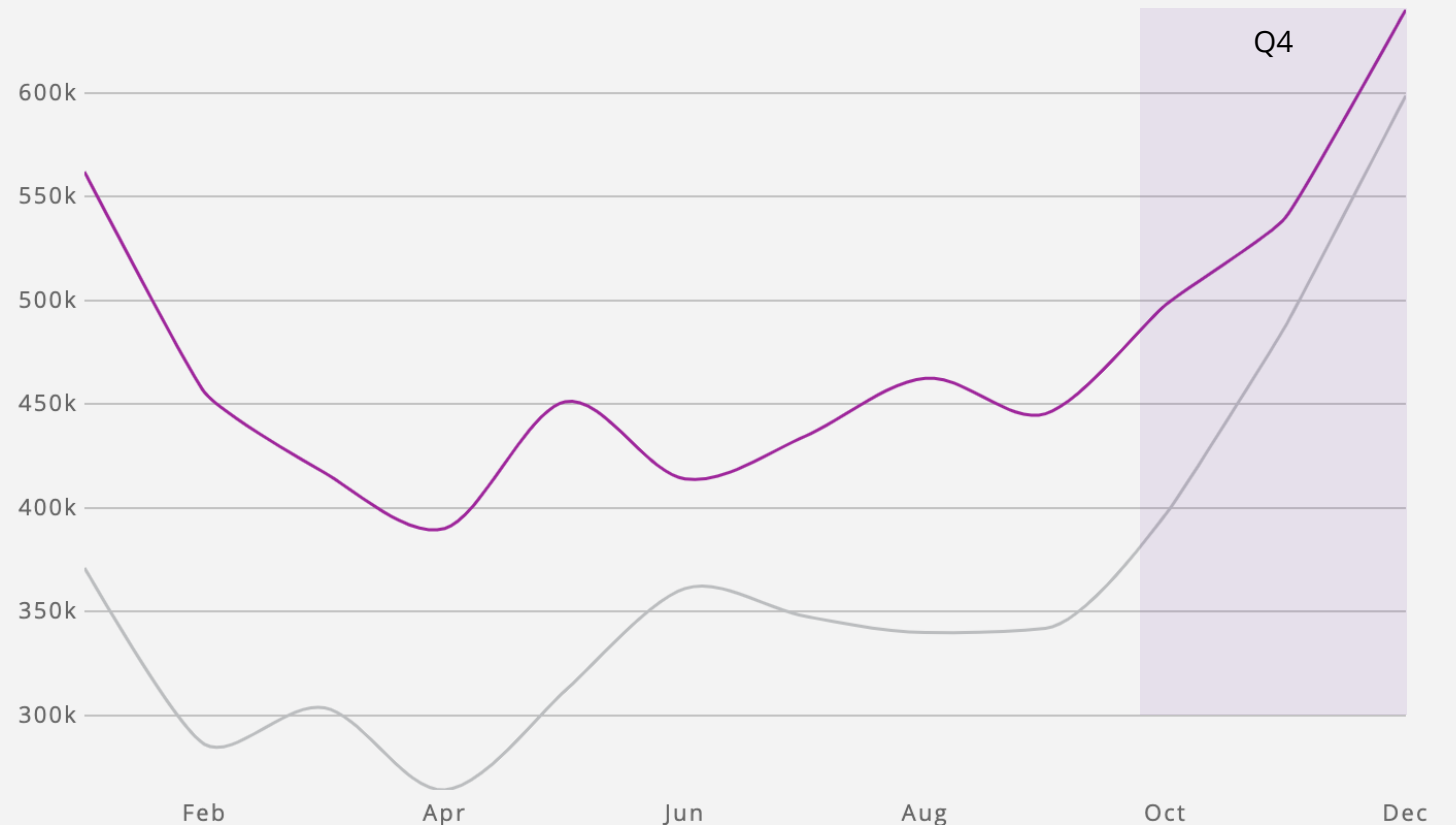
Data from Q4 2022 shows an increase of 12,9% in search volume compared to the same period last year.

The search volume grew throughout the year but the gap between 2021 and 2022 volumes lessened towards the end of the year. This change can be related to the smaller number of campaigns during Q4 2022 in comparison to 2021 when a higher number of campaigns were identified, impacting search volumes non-organically.

Seasonality of searches for Finland

● Jan - Dec 2022

● Jan - Dec 2021



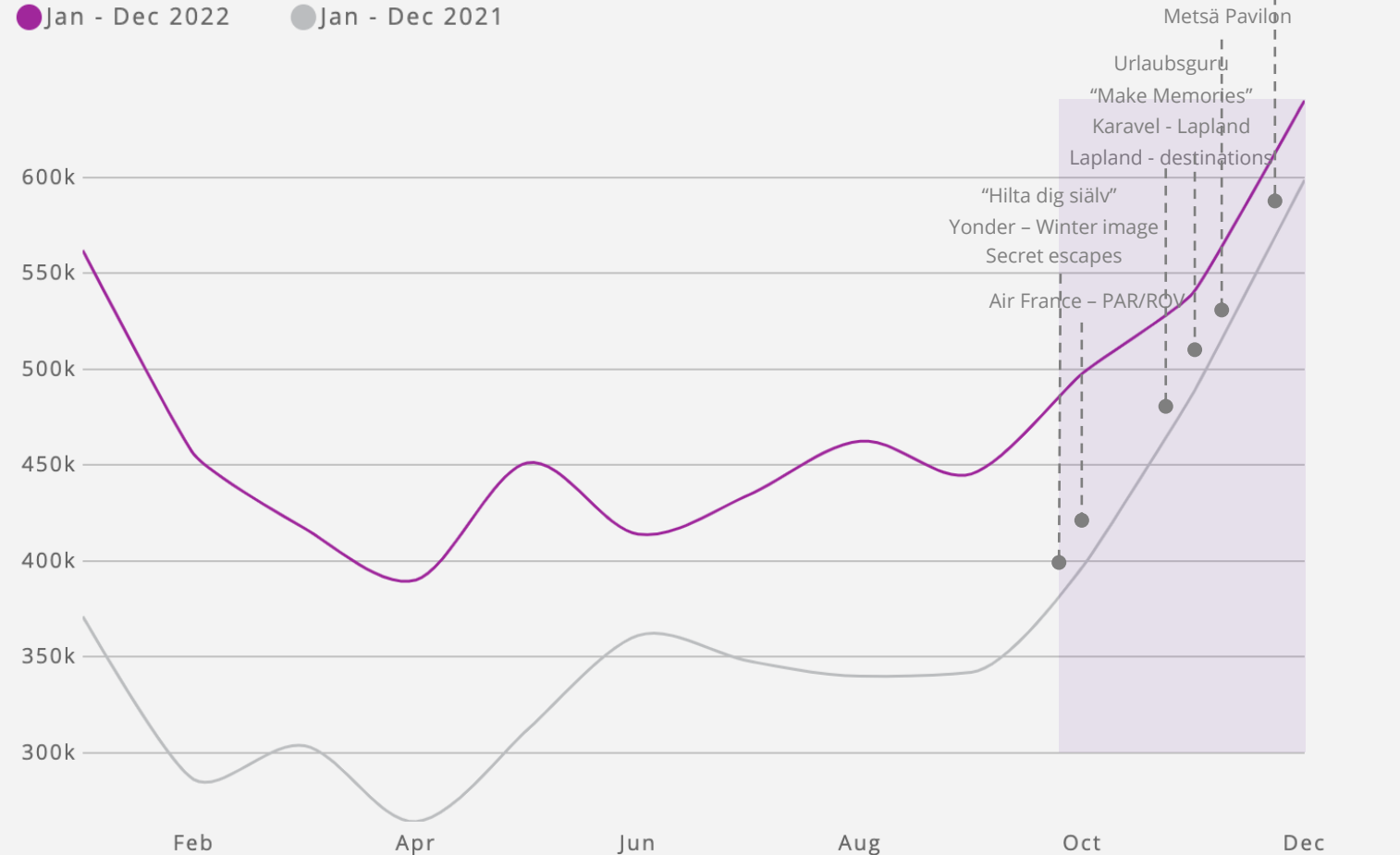
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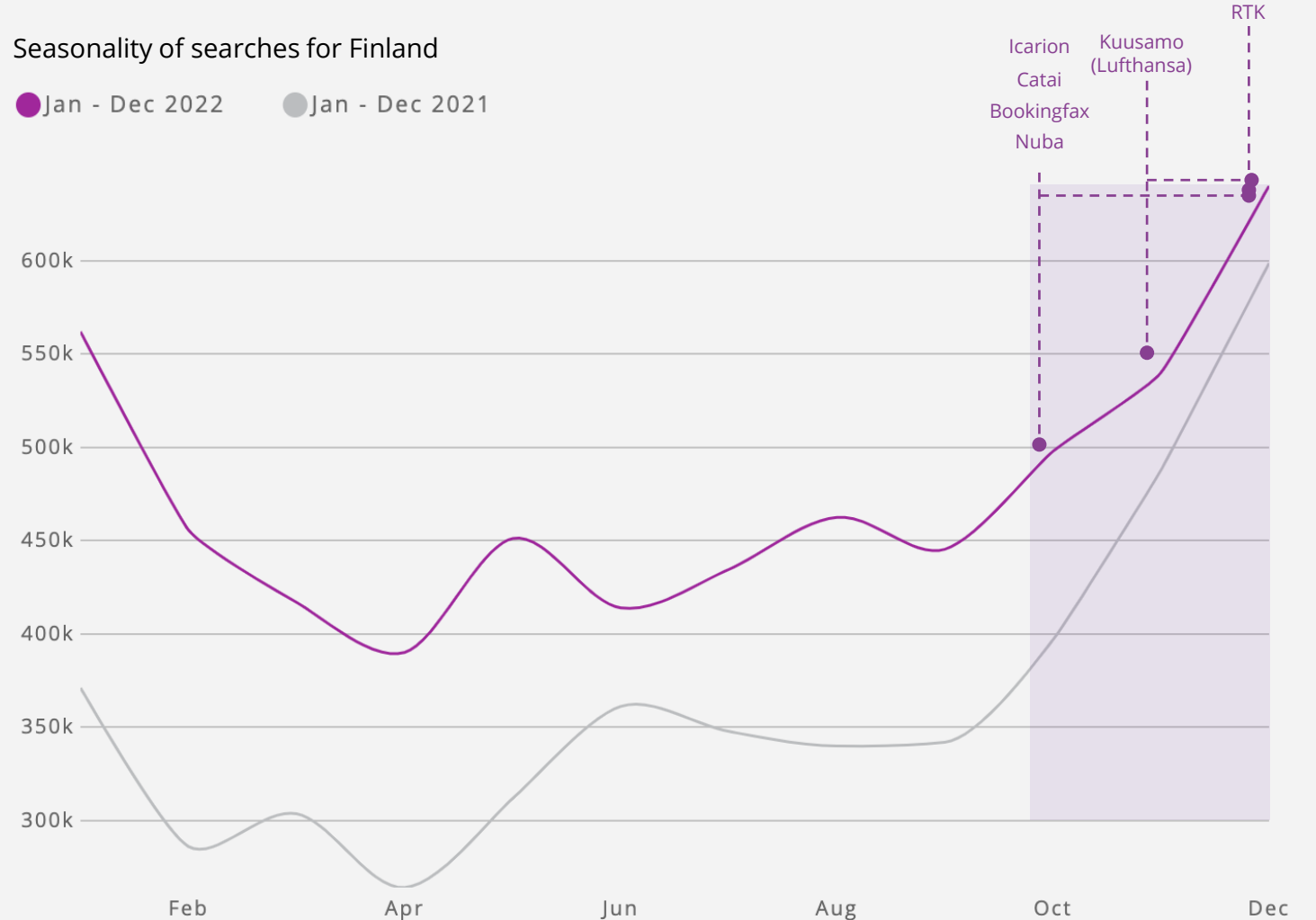


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Conclusion #3

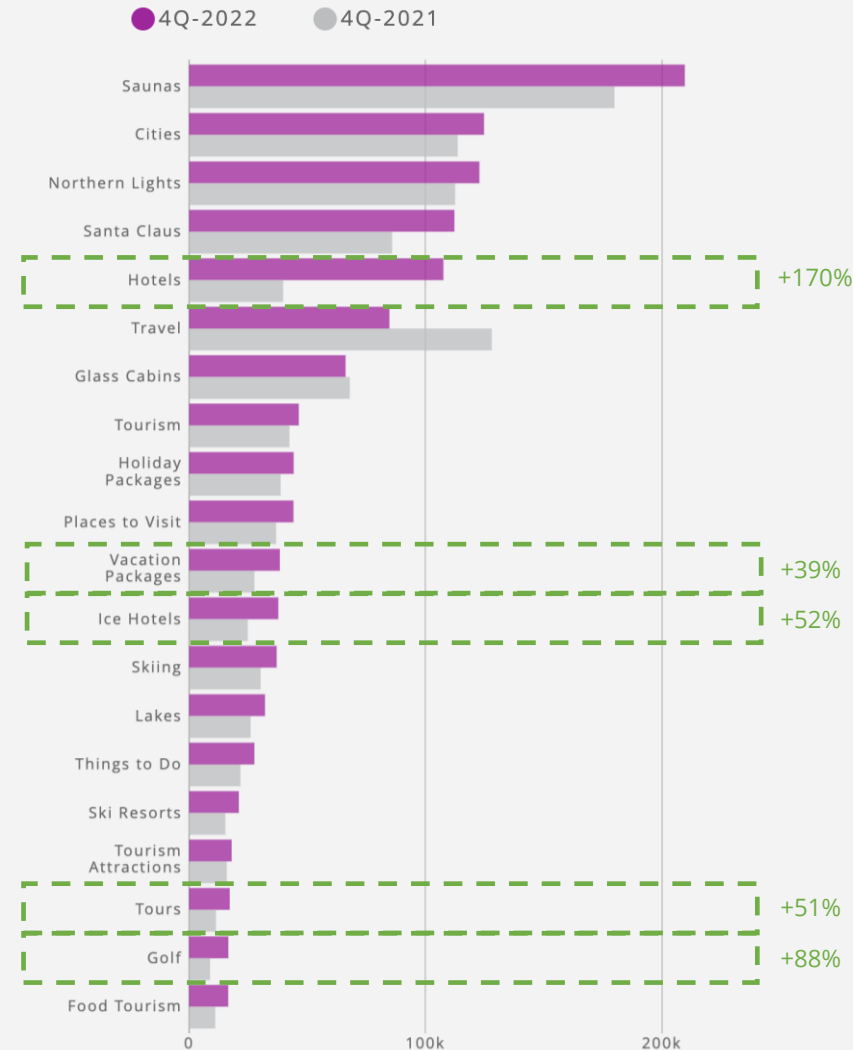
Searches for Accommodation and Activities continue to grow...

The majority of the top Micro-Brandtags for Finland show growth in searches in Q4 2022 compared to the same period in 2021.

Searches by international tourists have grown significantly for Hotels (+170%), Tours (+51%) and information associated with Vacation Packages (+39%) and Golf (+88%).

Demand for special types of accommodation, especially Ice Hotels, has increased by over 52%.

Top 20 Micro-Brandtags for Finland *Internationally*



Conclusion #3

Searches for Accommodation and Activities continue to grow. Travel reflects post-pandemic behaviour

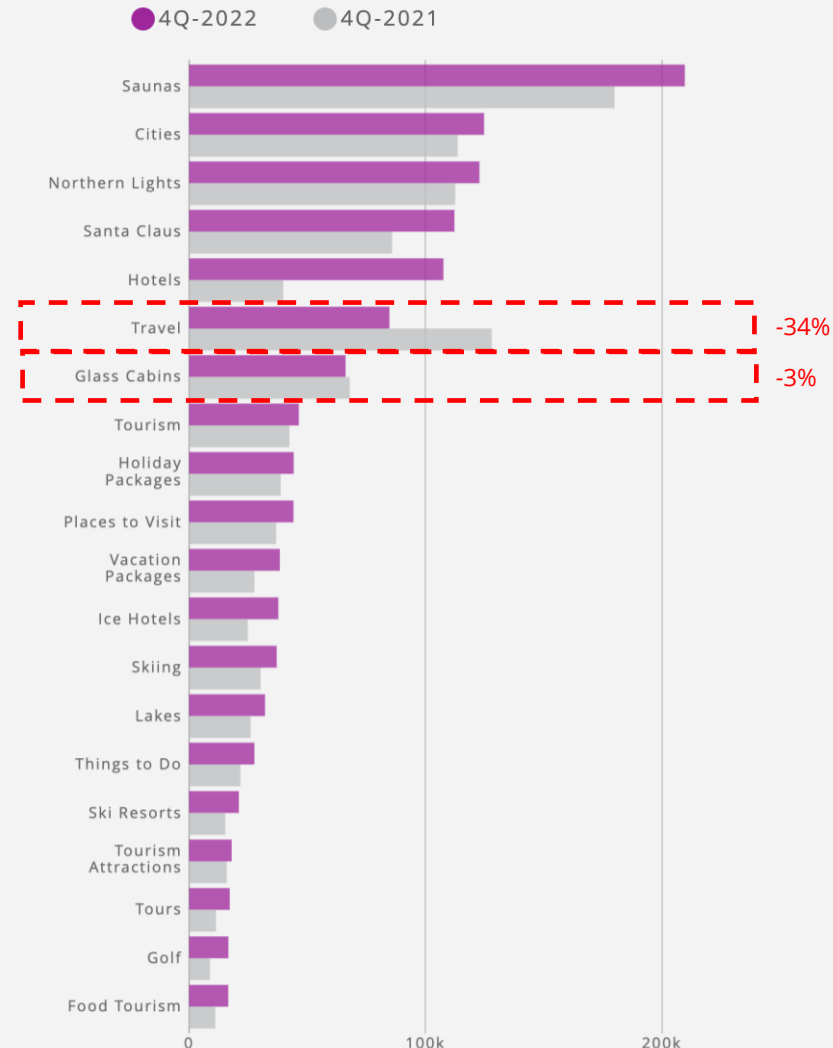
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The only Brandtags in the Top 20 to not show growth are Travel (-34%) and Glass Cabins (-3%) with a search volume close to last year's.

Top 20 Micro-Brandtags for Finland *Internationally*



Conclusion #4

Germany is once again the main target market for Finland in Q4 2022...

Germany and Japan hold onto their spots in the Top 3, while the United States outperform the United Kingdom, compared to Q4 2021. Compared to Q3 2022, the Top 3 target markets remain unchanged.

With 204,9K searches, Germany leads the international target market distribution ranking. It held onto the same position it held in Q4 2021 and showed a 20,2% increase in demand.

Germany is followed very closely by Japan (204,5K), the United States (173K) and the United Kingdom (123K) as the first-tier markets.

France (88K), Italy (80,5K) and Spain (76,6K) are the second-tier markets. The order of the second-tier markets remains almost the same as in Q3 2022 with Italy and France switching places.

Target Market Distribution Q4 2022

Rank	Flag	Country	Searches	Growth	Rank	Flag	Country	Searches	Growth
1	-	Germany	204,983	20.2%	11	Switzerland	Switzerland	40,958	13.2%
2	-	Japan	204,547	26.7%	12	Estonia	Estonia	38,386	-16.2%
3		United States	172,738	16.1%	13	-	Sweden	36,849	3.7%
4		United Kingdom	123,364	-21.6%	14	Austria	Austria	30,478	8.3%
5	-	France	87,758	10.4%	15	Australia	Australia	29,058	67.8%
6	-	Italy	80,476	1.4%	16	-	Belgium	22,542	-0.9%
7		Spain	76,664	13.8%	17	South Korea	South Korea	18,083	23.5%
8		Netherlands	45,916	-22.0%	18	China	China	16,946	-7.2%
9		India	45,847	8.0%	19		Russia	0	-100.0%
10		Canada	41,845	22.3%					

Conclusion #4

Germany is once again the main target market for Finland in Q4 2022. The rising starts of 2021 dropped in the ranking...

Most European markets showed an increase in searches in Q4 2022, except the United Kingdom (-21,6%), Estonia (-16,2%) and the Netherlands (-22%).

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Conclusion #4

Germany is once again the main target market for Finland in Q4 2022. The rising starts of 2021 dropped in the ranking. Long-haul markets continue to grow

Most European markets showed an increase in searches in Q4 2022, except for the United Kingdom (-21,6%), Estonia (-16,2%) and the Netherlands (-22%).

Demand from long-haul markets grew rapidly, especially from Australia - the fastest growing international target market for Finland. Australia registered an increase of almost 68%. But other long-haul markets too reported an increase in searches in Q4 2022, such as Canada (+22,3%) and South Korea (over +23%).

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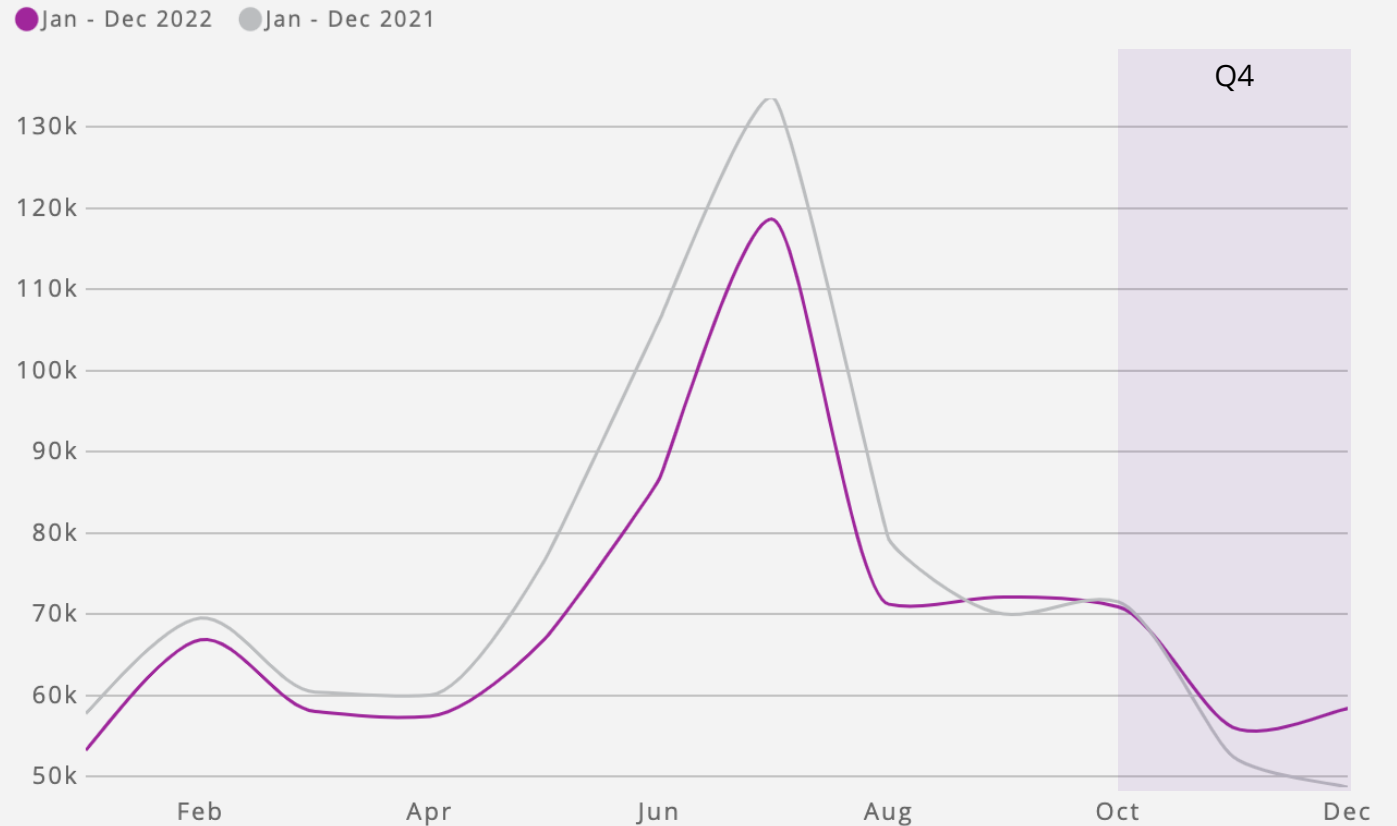
Conclusion #5

The domestic market volume in Q4 2022 surpassed 2021 levels

With over 185K searches in Q4 2022, the domestic market of Finland showed an increase of 7,34% compared to 2021.

The increase in demand is especially visible in the last two months of the year, which (with the exception of September) are the only ones to surpass 2021 demand.

Seasonality of searches for Finland **Domestic**



Conclusions Q4 2022

- #1 Constant 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 behaviour.
- #4 Germany is once again the main target market for Finland in Q4 2022. The rising starts of 2021 dropped in the ranking. Long-haul markets continue to grow.
- #5 The domestic market volume in Q4 2022 surpasses 2021 levels.

Thank you!

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