

Finland Digital Demand results 2023

What's up seminar

Olga Nowak

Place analytics Senior Consultant

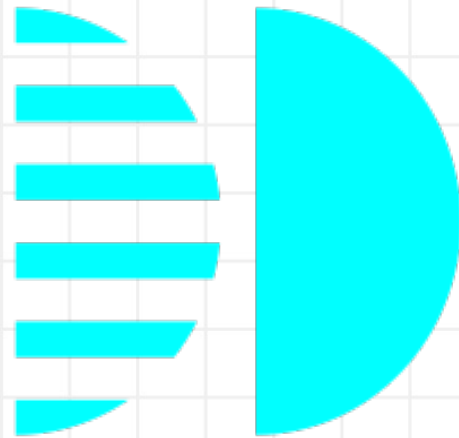
April 17th, 2024

Google



Google Search

I'm Feeling Lucky



D2
Digital
Demand

Key findings 2023

World outlook

199.6m
Americas

423.1m
Europe

83.9m
Africa

218.6m
Asia

28.3m
Oceania

World outlook

+27,8%
Americas

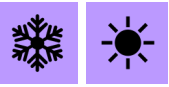
+14,6%
Europe

+12,6%
Nordics

+34,9%
Africa

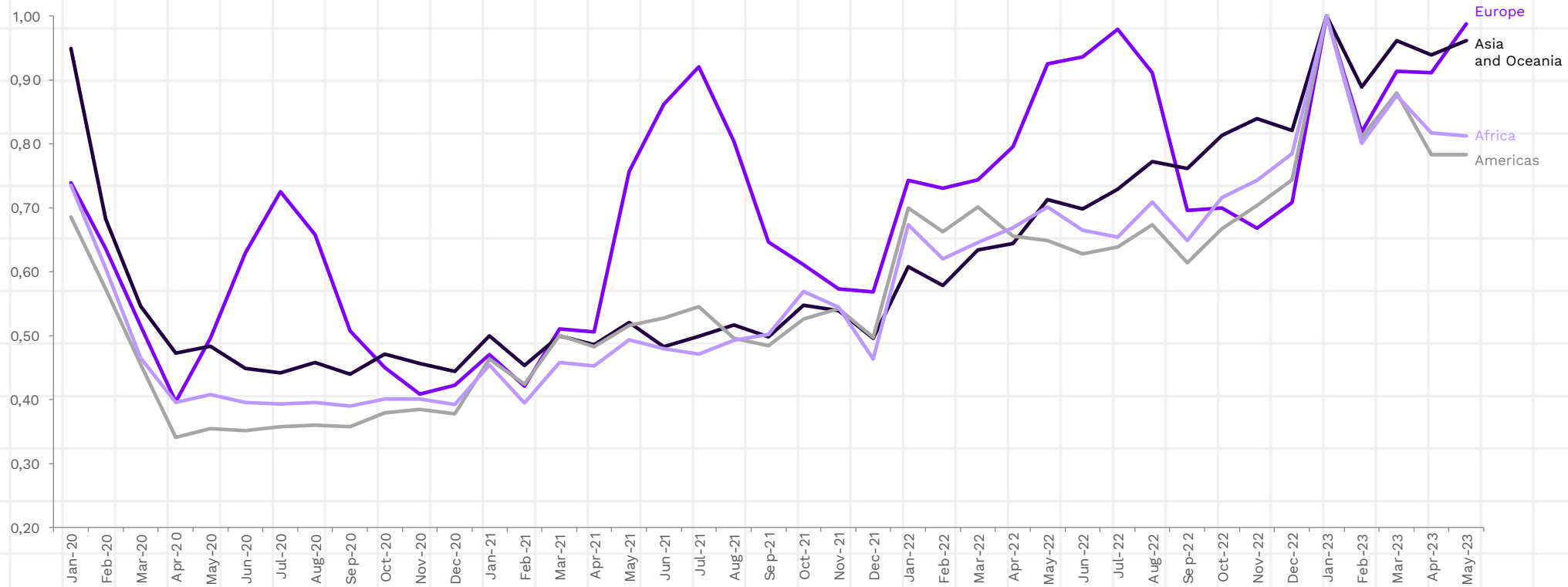
+44,4%
Oceania

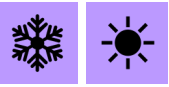
+51,7%
Asia



Continents seasonality of relative search interest

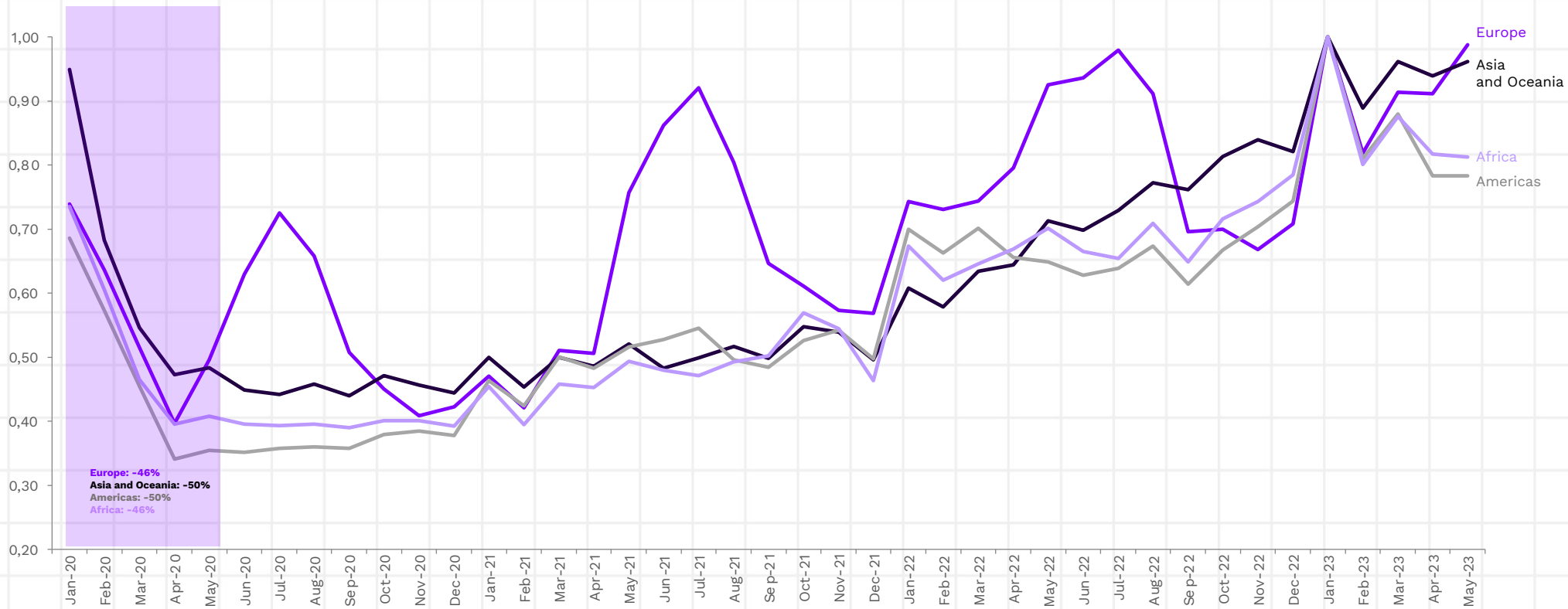
— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa

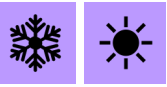




Continents seasonality of relative search interest

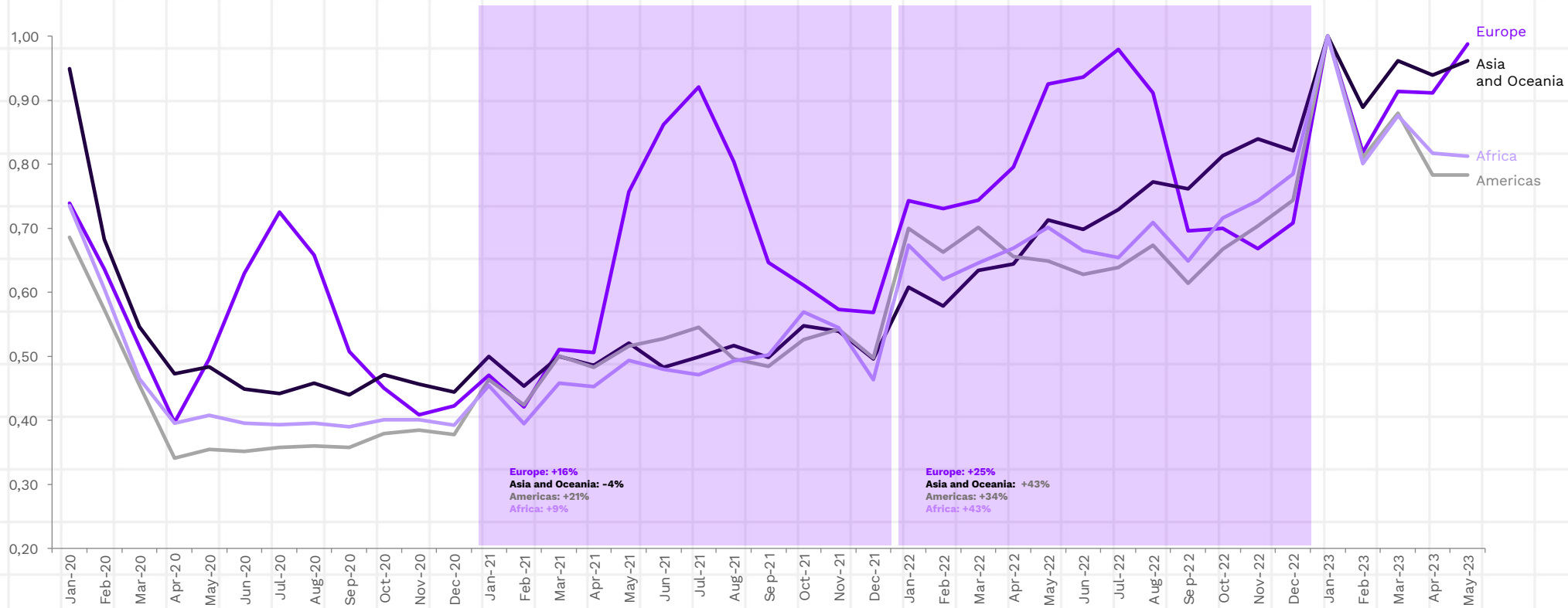
— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa





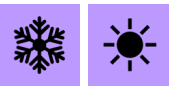
Continents seasonality of relative search interest

— Continent relative search interest from January 2020 to May 2023 | Europe, Asia and Oceania, Americas, Africa





Who is searching
for Finland?

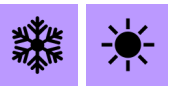


Germany remains the top market of Finland, followed closely by Japan

Search Volume and Growth for Finland's Target Markets

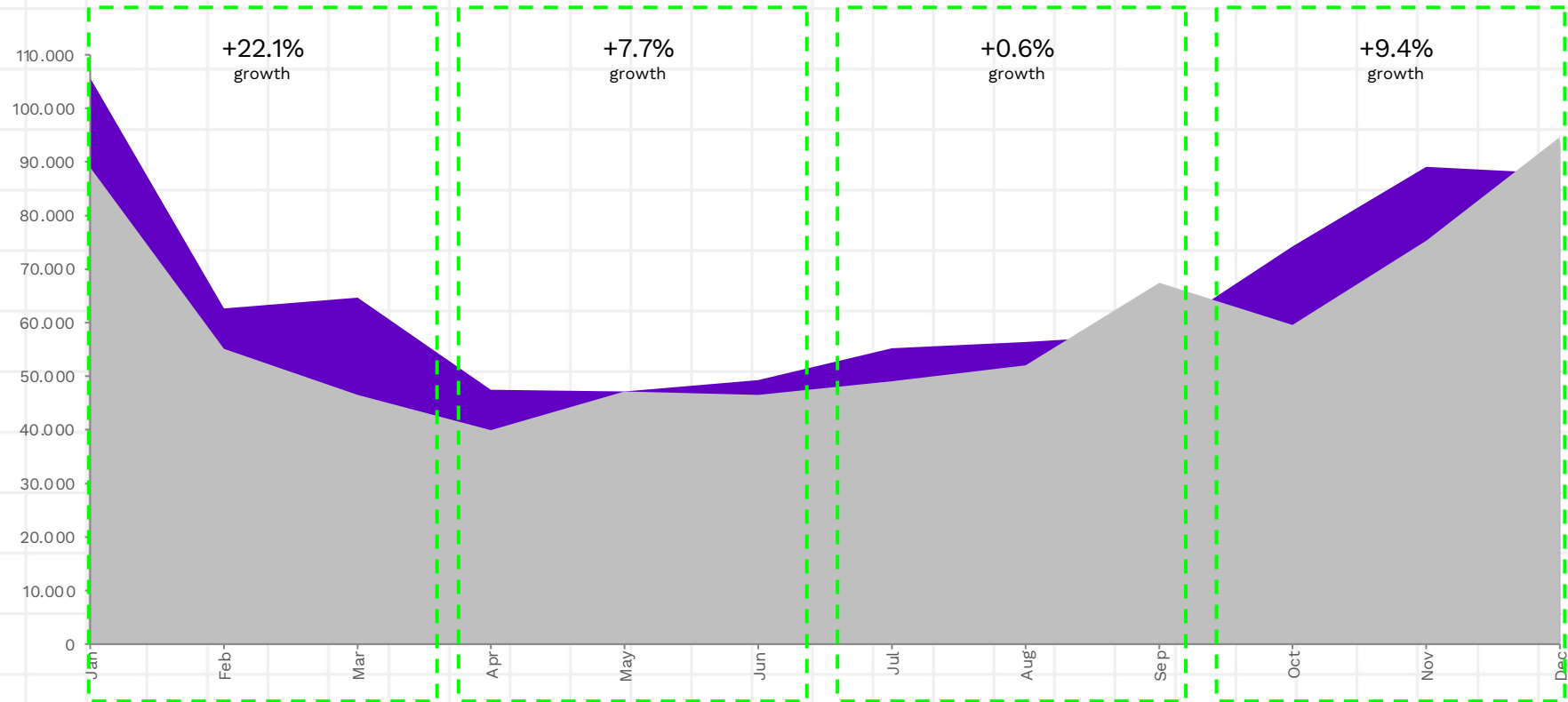
Searches: 2023 | Growth: 2023 vs 2022

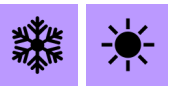
Rank	Flag	Target Market	Searches		Rank	Flag	Target Market	Searches
1		Germany	795K	Tier 1	10		India	200K
2		Japan	758K		11		Netherlands	195K
3		United States	653K		12		Switzerland	163K
4		United Kingdom	473K		13		Canada	156K
5		France	357K		14		Australia	136K
6		Italy	351K		15		Austria	122K
7		Spain	249K		16		China	104K
8		Sweden	226K		17		Belgium	93K
9		Estonia	204K		18		South Korea	70K



Search volume by month for target market Germany

— Finland search volume market Germany 2023 vs 2022 





The overall position of Germany is based on the strong performance in Q1 of 2023

Search Volume and Growth for Finland's Target Markets

Searches for 2023

Rank	Flag	Target Market	Searches
1		Germany	795K
2		Japan	758K
3		United States	653K
4		United Kingdom	473K
5		France	357K
6		Italy	351K
7		Spain	249K
8		Sweden	226K
9		Estonia	204K



Q1 2023

Rank	Flag	Target Market
1		Germany
2		United States
3		Japan

Q3 2023

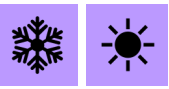
Rank	Flag	Target Market
1		Japan
2		Germany
3		United States

Q2 2023

Rank	Flag	Target Market
1		Japan
2		United States
3		Germany

Q4 2023

Rank	Flag	Target Market
1		Japan
2		Germany
3		United States



The overall position of Germany is based on the strong performance in Q1 of 2023, while Japan leads in other quarters

Search Volume and Growth for Finland's Target Markets

Searches for 2023

Rank	Flag	Target Market	Searches
1		Germany	795K
2		Japan	758K
3		United States	653K
4		United Kingdom	473K
5		France	357K
6		Italy	351K
7		Spain	249K
8		Sweden	226K
9		Estonia	204K



Rank	Flag	Target Market
1		Germany
2		United States
3		Japan

Q1 2023

Rank	Flag	Target Market
1		Japan
2		United States
3		Germany

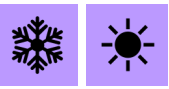
Q2 2023

Rank	Flag	Target Market
1		Japan
2		Germany
3		United States

Q3 2023

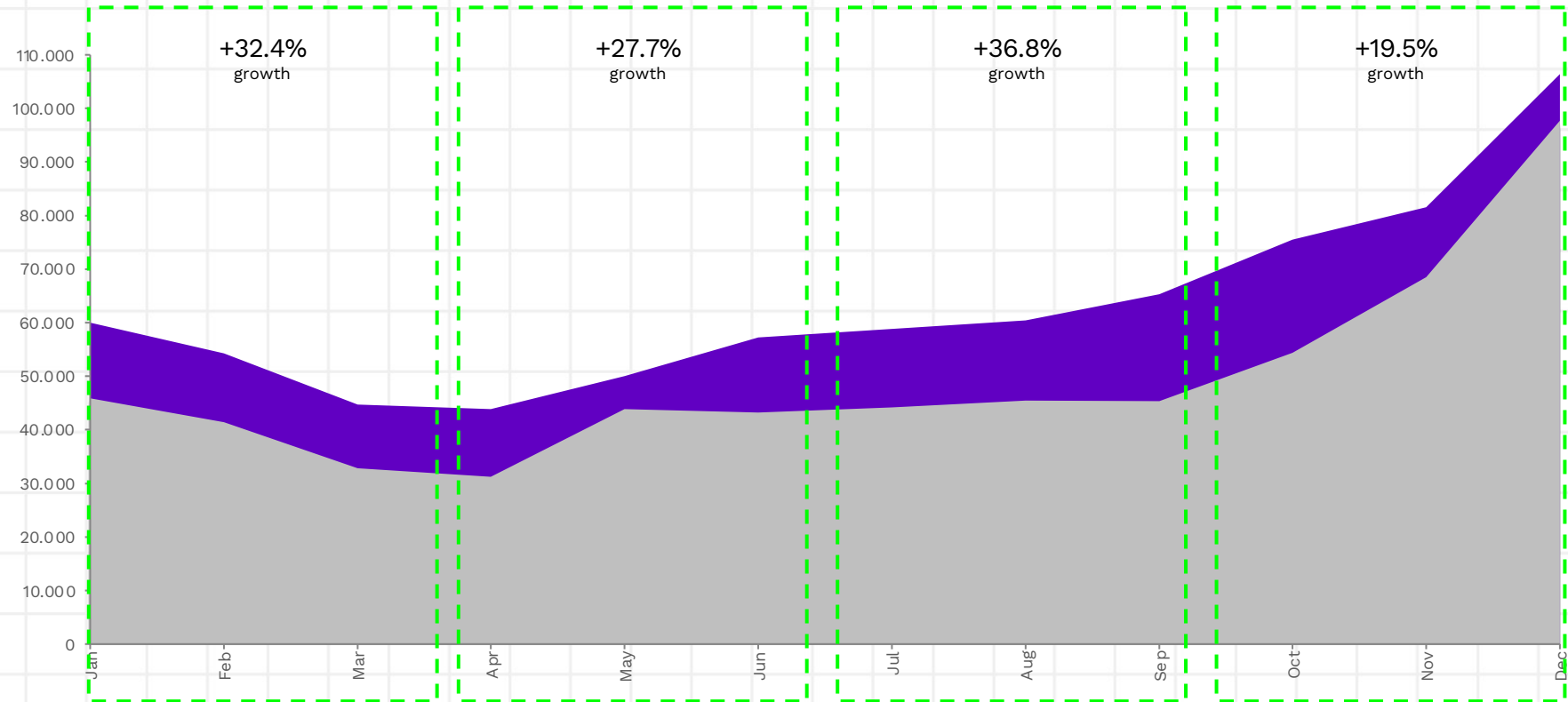
Rank	Flag	Target Market
1		Japan
2		Germany
3		United States

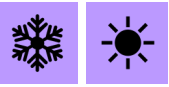
Q4 2023



Search volume by month for target market Japan

— Finland search volume market Japan 2023 vs 2022

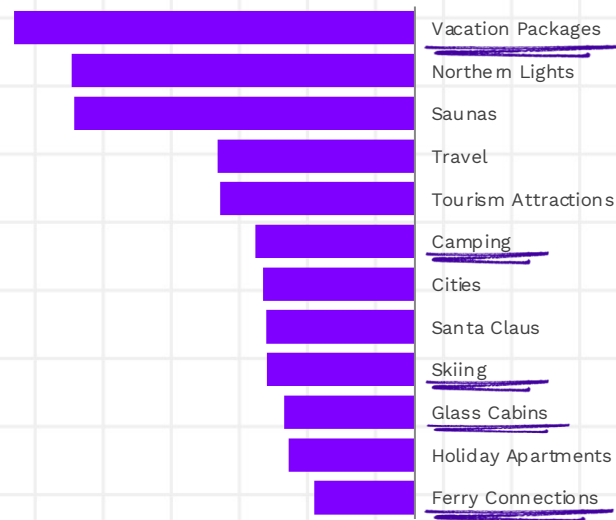





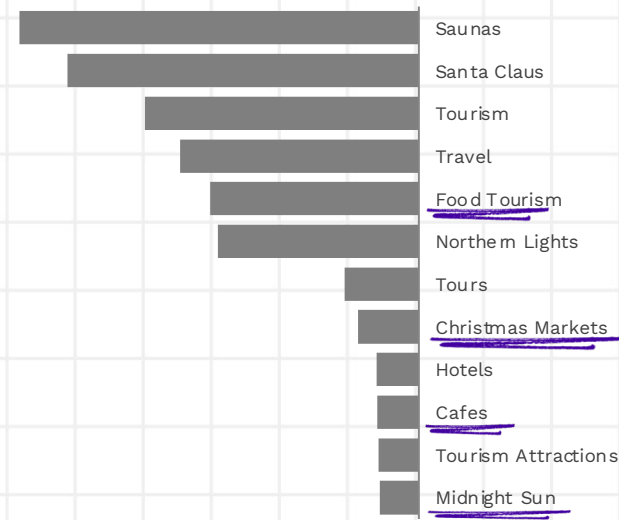
Germans and Japanese are looking for a different offer in Finland

Top 12 Micro-Brandtags for Finland from markets Germany and Japan

■ TM Germany 2023 ■ TM Japan 2023



Germany 



Japan 



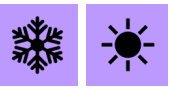
Germany remains the top market of Finland, but the fastest-growing ones are the distant markets

Search Volume and Growth for Finland's Target Markets

Searches: 2023 | Growth: 2023 vs 2022

Rank	Flag	Target Market	Searches	Growth
1		Germany	795K	+10.4%
2		Japan	758K	+27.7%
3		United States	653K	+19.9%
4		United Kingdom	473K	+12.5%
5		France	357K	+7.8%
6		Italy	351K	+7.3%
7		Spain	249K	+6.7%
8		Sweden	226K	+7.1%
9		Estonia	204K	+5.6%

Rank	Flag	Target Market	Searches	Growth
10		India	200K	+29.7%
11		Netherlands	195K	-6.2%
12		Switzerland	163K	+7.1%
13		Canada	156K	+9.3%
14		Australia	136K	+38.5%
15		Austria	122K	+11.5%
16		China	104K	+38.0%
17		Belgium	93K	+1.2%
18		South Korea	70K	+36.3%



They grow across the majority of their top searched micro-brandtags

Top 12 Micro-Brandtags for the fastest growing markets

Searches: January – December 2023

 Australia	 China	 South Korea	 India	 Japan	 United States
Santa Claus ▲	Tourism	Saunas	Cities	Saunas	Saunas
Saunas ▲	Travel ▲▲▲	Travel ▲▲	Holiday Packages ▲	Santa Claus	Hotels ▲▲
Travel ▲▲▲	Skiing	Northern Lights ▲▲	Places to Visit ▲	Tourism ▲▲	Cities
Holiday Packages ▲▲▲	Sledding	Places to Visit ▲▲	Hotels ▲▲	Travel ▲▲▲	Santa Claus ▲
Places to Visit	Shopping ▲▲▲	Hotels ▲▲▲	Visit ▲	Food Tourism ▲	Places to Visit
Tours ▲▲	Saunas ▲	Glass Cabins ▲▲▲	Saunas	Northern Lights	Restaurants
Cities	Santa Claus	Happiness Index ▲▲	Travel ▲▲	Tours ▲▲▲	Tourism ▲▲▲
Ice Hotels ▲	Holiday Packages ▲	Santa Claus	Santa Claus ▲▲	Christmas Markets ▲	Travel ▲
Hotels ▲▲	Hotels ▲▲	Midnight Sun ▲▲	Tourism ▲▲▲	Hotels ▲▲	Ice Hotels
Skiing ▲▲	Museums ▲▲	Lakes	Tours ▲	Cafes	Glass Cabins

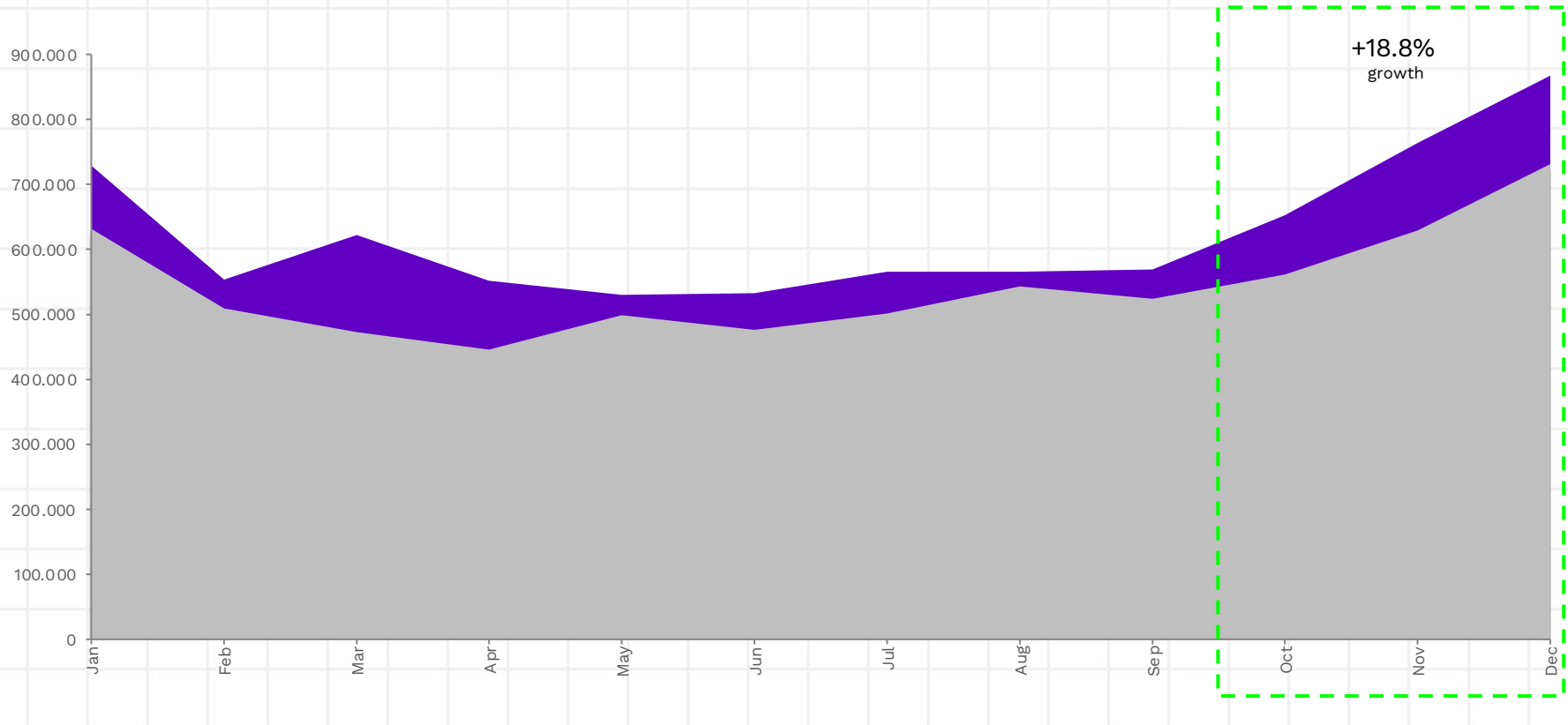


Let's focus
on Finnish winter



Finnish winter with an exceptional performance once again

— Finland search volume international 2023 vs 2022





What are the top searched themes in winter for Finland?



Santa Claus



Saunas



Northern Lights



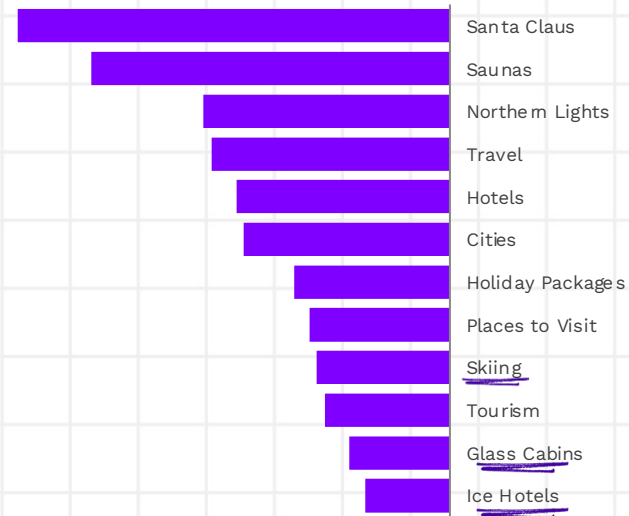
Cities



Top Micro-Brandtags for Finland in Q4 2023

Top 12 Micro-Brandtags internationally for Finland

■ Q4 2023



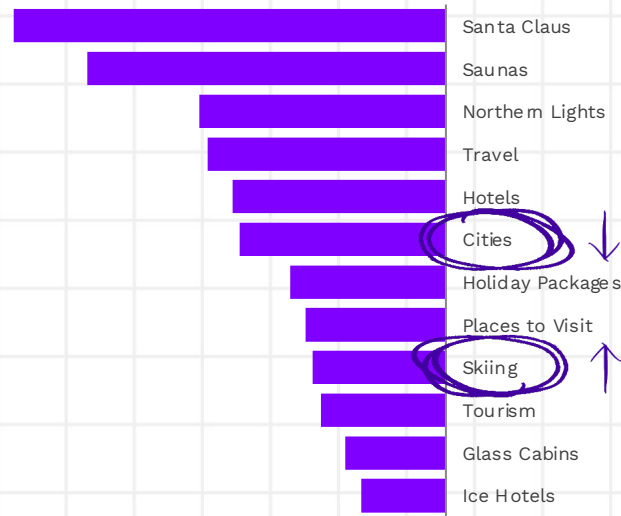
Q4 2023



With Cities decreasing and Skiing going up

Top 12 Micro-Brandtags internationally for Finland

■ Q4 2023 ■ Q4 2022



Q4 2023



Q4 2022



Other winter related Micro-Brandtags for Finland that continue to grow

Emerging Micro-Brandtags for Finland

Searches: Q4 2023 | Growth: Q4 2023 vs Q3 2022



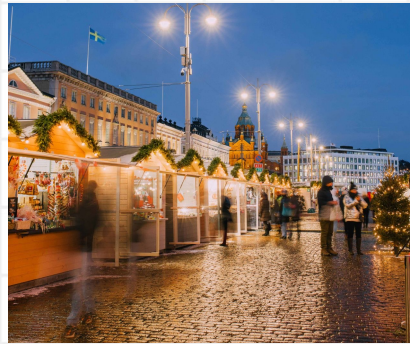
Reindeers

23.4K searches
+16.0% growth



Museums

22.6K searches
+66.3% growth



Christmas Markets

22.1K searches
+39.6% growth



Ski Resorts

14.8K searches
+43.7% growth



Top Target Markets by search volume and growth for Finland

Search Volume and Growth for Finland's Target Markets

Searches: Q4 2023 | Growth: Q4 2023 vs Q4 2022



#1



#2



#3

Main markets



+95.6%



+42.1%



+19.4%



+25.3%



+26.1%



+20.2%



+23.9%

Fastest growing markets



+2.7%



+3.1%

Slowest growing markets

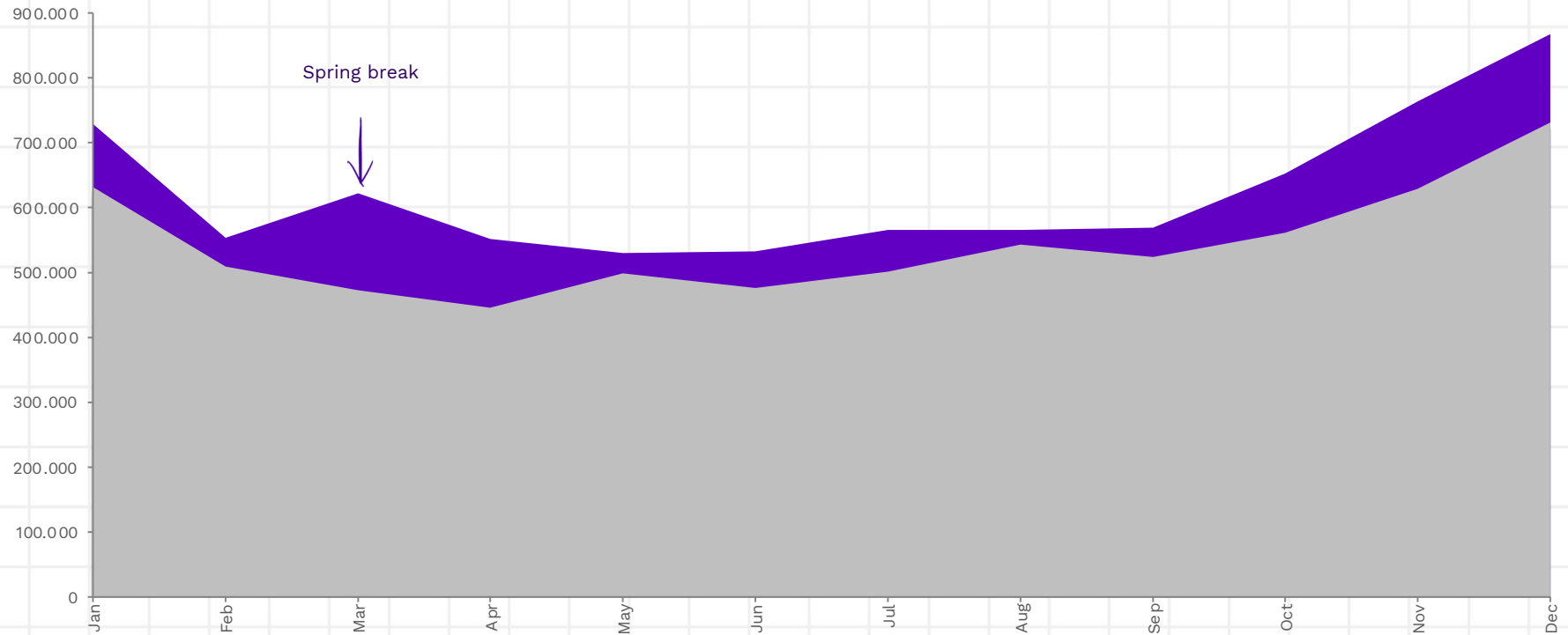


High season does not finish
with the end of December



Search volume by month for Finland

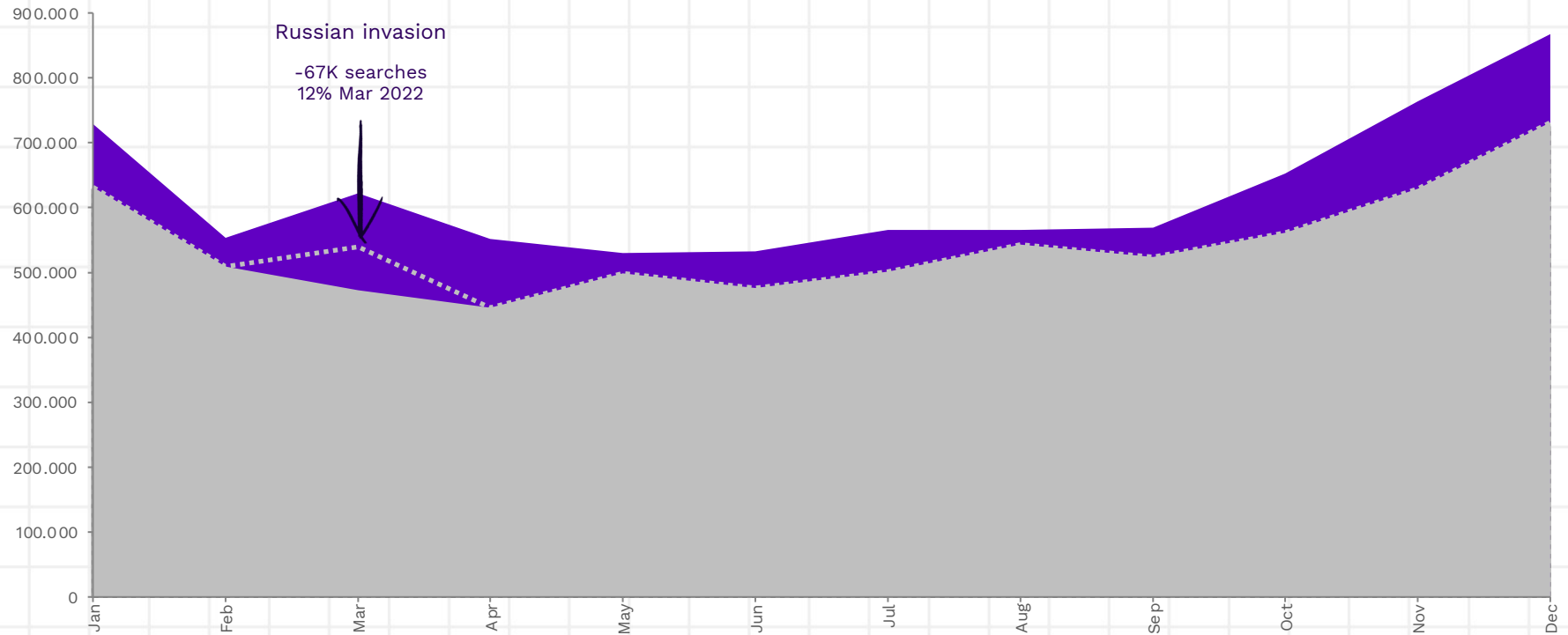
— Finland search volume 2023 vs 2022





Search volume by month for Finland

— Finland search volume 2023 vs 2022





Search volume by month for Finland

Top 12 Micro-Brandtags internationally for Finland

■ Q1 2023



Q1 2023



Australia and India as the fastest growing markets, while the search volume for the Netherlands has dropped dramatically

Search Volume and Growth for Finland's Target Markets

Searches: Q1 2023 | Growth: Q1 2023 vs Q1 2022



#1



#2



#3

Main markets



+63.8%



+43.8%



+32.4%



+29.4%



+26.8%



+25.2%



+22.3%

Fastest growing markets



-4.1%



-6.6%



-22.3%

Markets with negative growth

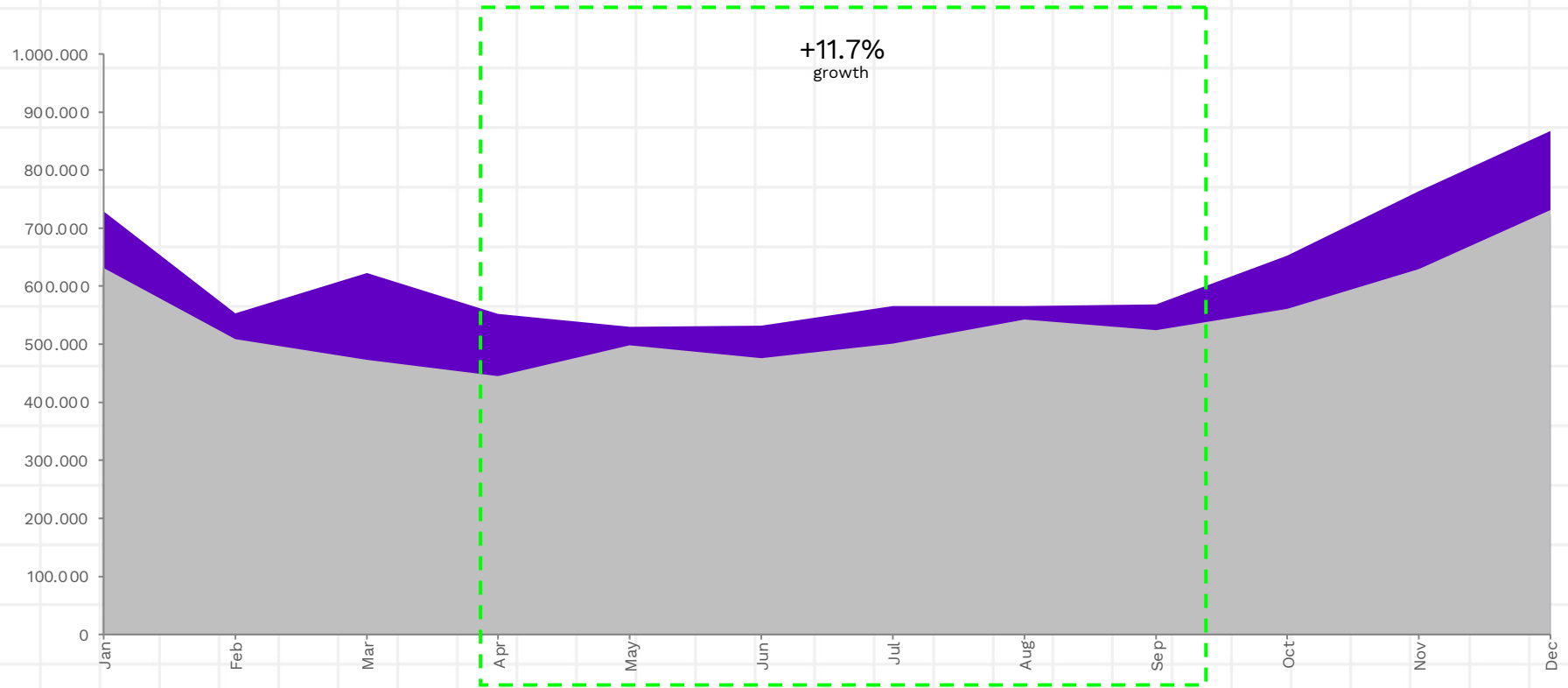


Searches for spring and summer in
Finland continue to grow organically



Searches for spring and summer in Finland grow organically

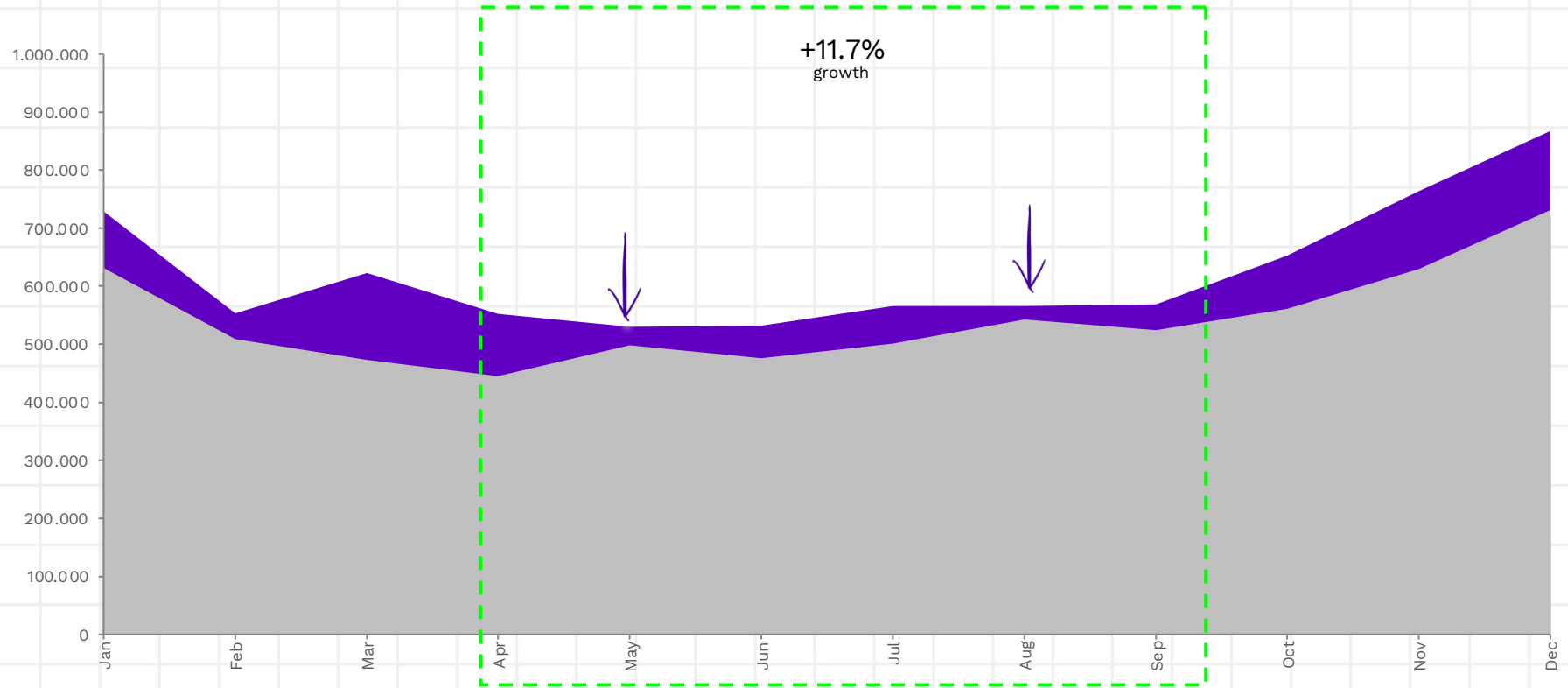
— Finland search volume international 2023 vs 2022

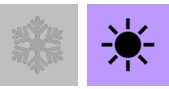




However, the trend is different than the last year...

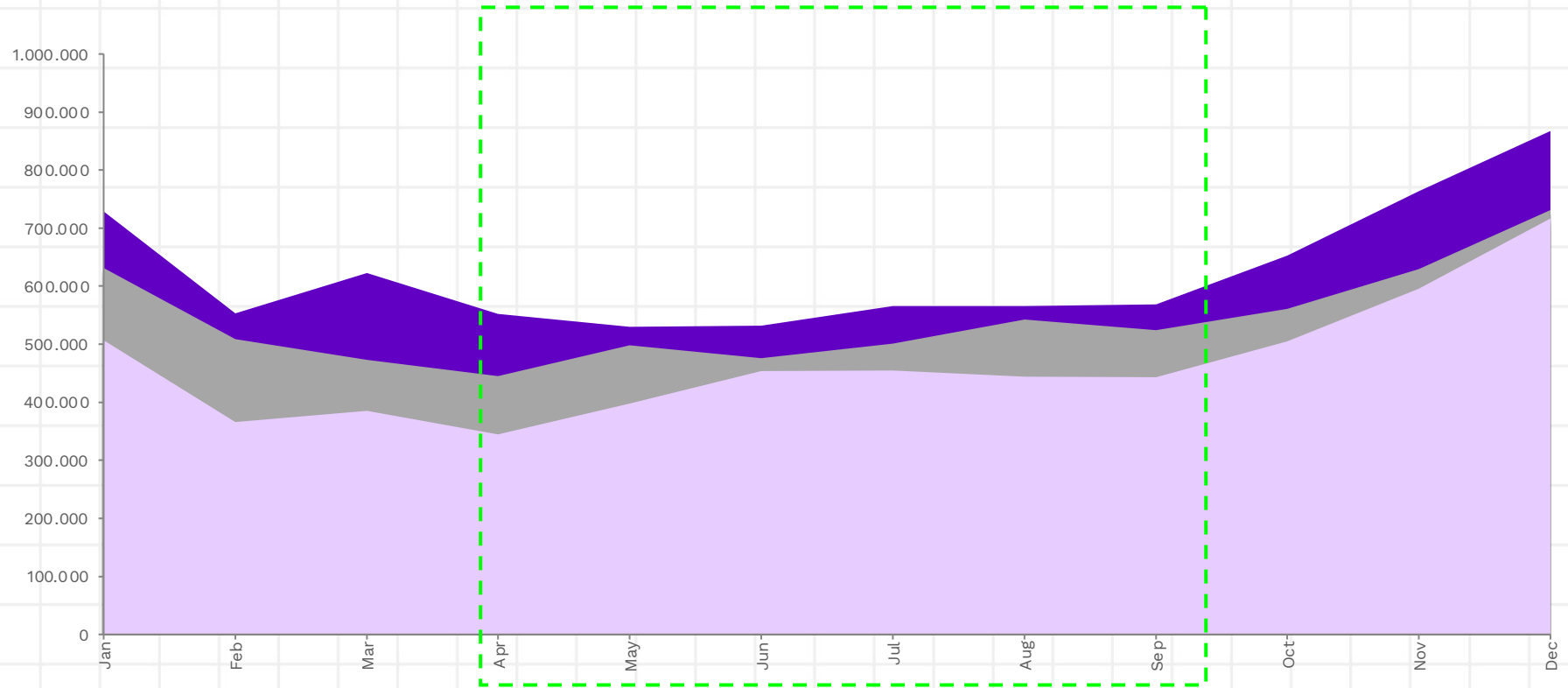
— Finland search volume international 2023 vs 2022





... following more the one from 2021

— Finland search volume 2023 vs 2022 vs 2021





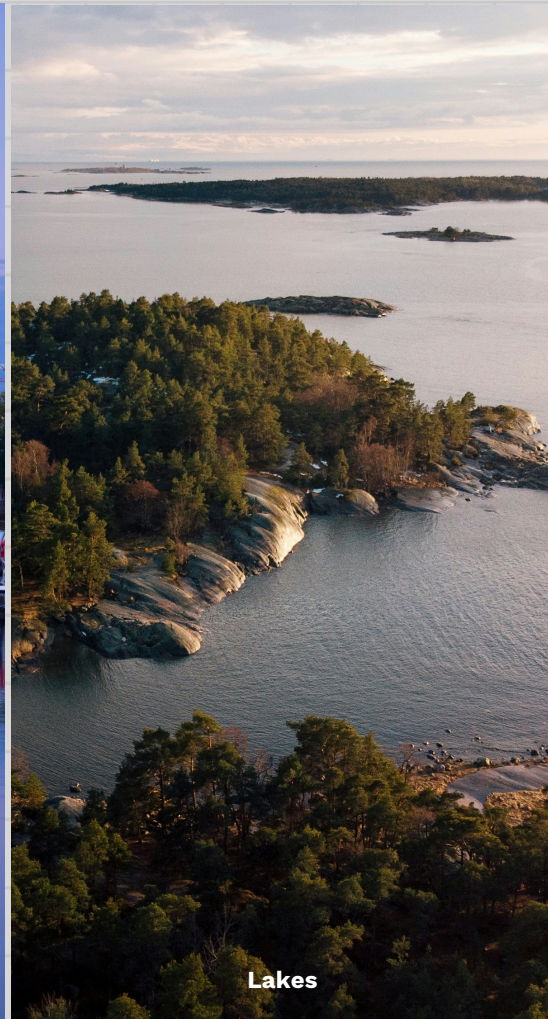
What are the top searched activities in spring and summer for Finland?



Saunas



Cities



Lakes



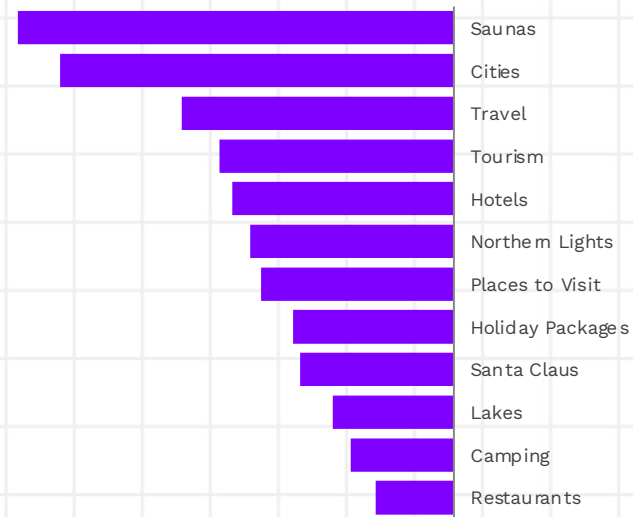
Camping



Top Micro-Brandtags for Finland in Q2 2023 and Q3 2023

Top 12 Micro-Brandtags internationally for Finland

■ Q2 and Q3 2023



Q2 and Q3 2023



Hotels and Restaurants are improving their positions, while Vacation Packages are down

Top 12 Micro-Brandtags internationally for Finland

■ Q2 and Q3 2023 ■ Q2 and Q3 2022





Other spring and summer related activities for Finland

Emerging Micro-Brandtags for Finland

Searches: Q2 and Q3 2023 | Growth: Q2 and Q3 2023 vs Q2 and Q3 2022



Restaurants

97.8K searches
+31.6% growth



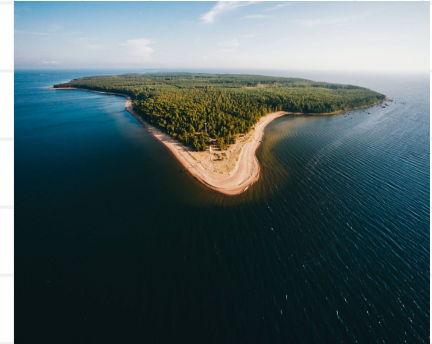
Museums

84.4K searches
+49.1% growth



National Parks

83.9K searches
+4.2% growth



Islands

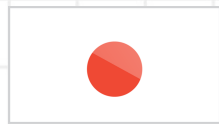
66.5K searches
+1.8% growth



Australia and South Korea grow the most, while Belgium and the Netherlands maintain stable

Search Volume and Growth for Finland's Target Markets

Searches: Q2 and Q3 2023 | Growth: Q2 2023 and Q3 2023 vs Q2 2022 and Q3 2022



#1



#2



#3

Main markets



+37.8%



+37.0%



+32.6%



+30.2%



+28.7%

Fastest growing markets



+0.3%



-3.6%

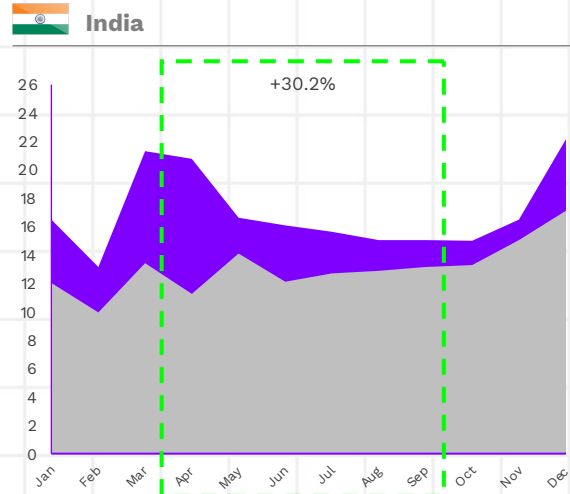
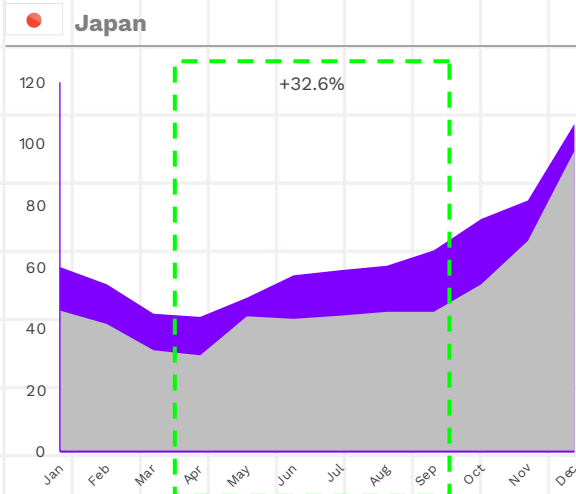
Slowest growing markets



Japan and India grow organically across all the months...

International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands

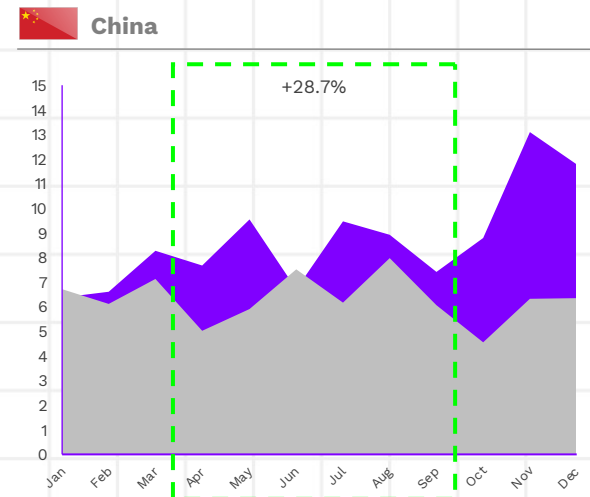
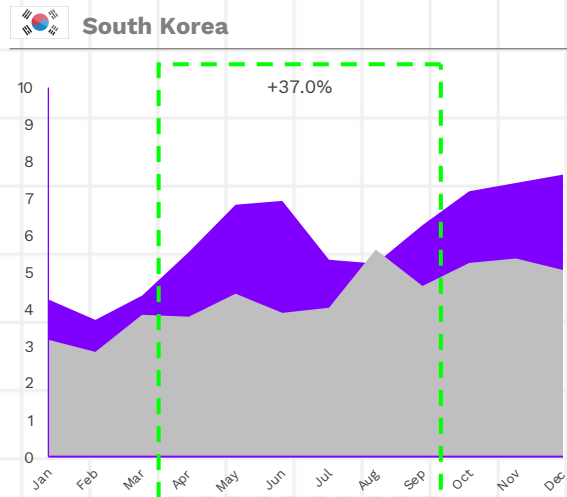
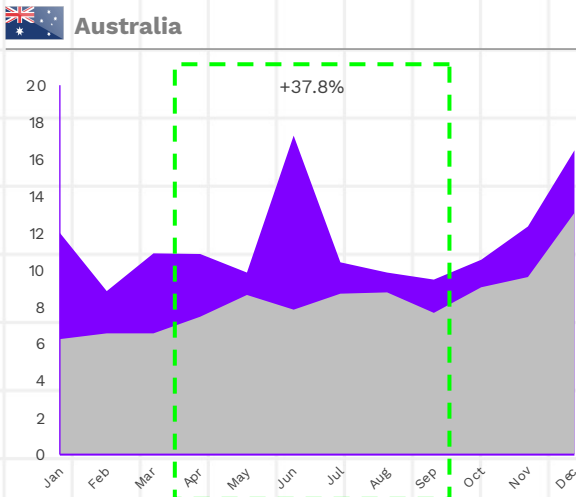




...while Australia, South Korea, and China show a less consistent increase in searches over the months

International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands





Where each of the five most growing markets in summer has its own behaviour

Top Micro-Brandtags for Target Markets of Finland

Order based on the searches Q2 and Q3 2023

 Japan	 India	 Australia	 China	 South Korea
1. Saunas	1. Holiday Packages	1. Saunas	1. Tourism	1. Travel
2. Tourism	2. Places to Visit	2. Santa Claus	2. Travel	2. Saunas
3. Travel	3. Hotels	3. Travel	3. Skiing	3. Northern Lights
4. Food Tourism	4. Visit	4. Holiday Packages	4. Shopping	4. Places to Visit
5. Northern Lights	5. Saunas	5. Places to Visit	5. Sledding	5. Hotels
6. Santa Claus	6. Tourism	6. Tours	6. Holiday Packages	6. Glass Cabins
7. Tours	7. Travel	7. Cities	7. Saunas	7. Lakes
8. Hotels	8. Tours	8. Hotels	8. Santa Claus	8. Midnight Sun
9. Tourism Attractions	9. Mosques	9. Ice Hotels	9. Hotels	9. Happiness Index
10. Midnight Sun	10. Santa Claus	10. Accommodation	10. Places to Visit	10. Tourism
11. Cafes	11. Happiness Index	11. Skiing	11. Museums	11. Santa Claus
12. Christmas Markets	12. Beaches	12. Tourism	12. Northern Lights	12. Events



But they are not the only
summer-oriented markets



But they are not the only summer-oriented markets

 Estonia



 Sweden



 Finland



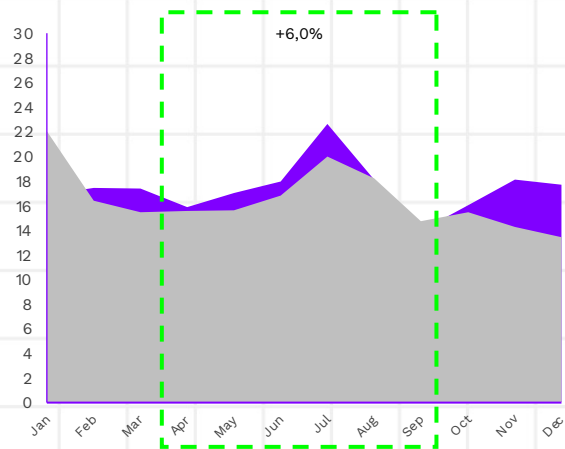


Estonia, Sweden, and domestic markets of Finland, search mainly in summer, surpassing volumes of 2022

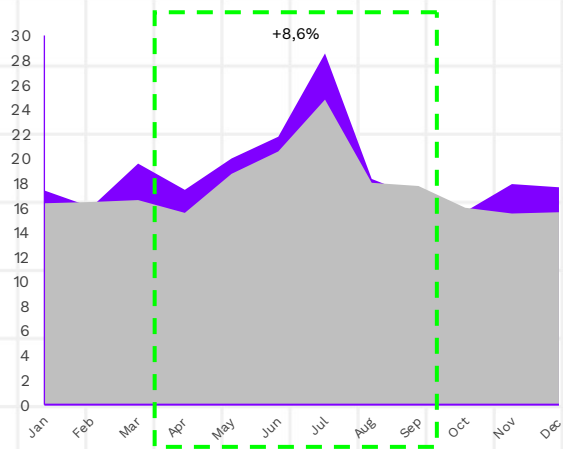
International search distribution by month

■ Q2 and Q3 2023 ■ Q2 and Q3 2022 | Searches in thousands

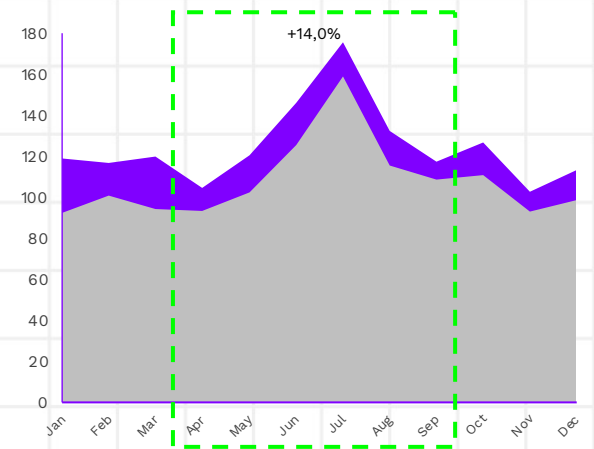
 Estonia



 Sweden



 Finland





Looking for specific activities such as *Entertainment Parks*, *Boating*, or *SPAs*

Top Micro-Brandtags for Target Markets of Finland

Order based on the searches Q2 and Q3 2023

 Estonia	 Sweden	 Finland
<ol style="list-style-type: none"> 1. Cities 2. Cottages 3. Lakes 4. Amusement Parks 5. Places to Visit 6. Zoos 7. Camping 8. Museums 9. Aquaparks 10. Things to Do 11. Travel 12. Cruises 	<ol style="list-style-type: none"> 1. Boating 2. Ferry Connections 3. Cruises 4. Cities 5. Travel 6. Saunas 7. Places to Visit 8. Lakes 9. Aquaparks 10. Hotels 11. Swamps and Wetlands 12. Tourism 	<ol style="list-style-type: none"> 1. Cities 2. SPA Resorts 3. National Parks 4. Lakes 5. Camping 6. Museums 7. Hotels 8. Restaurants 9. SPA Hotels 10. Tourism 11. Castles and Fortresses 12. Holiday Packages

5

conclusions 2023

Conclusions:

1. Tourism is booming worldwide, but it is growing at a slower pace in the Nordic countries
2. Finland grows at twice the rate of its direct competitors
3. Germany remains the top market of Finland, but the fastest-growing ones are the distant markets
4. Finnish winter with an exceptional performance once again
5. Searches for spring and summer in Finland continue to grow organically

Thank you!

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