



**Visit Finland**



Digital  
Demand

# Digital Demand report 2020

- The purpose of the report is to give a holistic overview of international touristic online searches regarding Finland in 2020
- The focus of the report is on comparing popular search topics between Nordic countries, regional key selling points, and seasonality of travel-related searches.
- The report also provides a quick review of international searches of target markets and most popular search topics
- For further and more detailed insights we have created a Power BI report that is free to use for anyone: [Finland's Digital Demand Power BI](#)
- For more detailed information about the effects of Covid-19 on touristic online searches, Bloom Consulting provided a presentation in March 2021:
- [Finland's Touristic Demand – 2020 in Review & Questions, Gonzalo Vilar, Bloom Consulting](#)

# Description of the data

- Touristic Online Searches 2020, from the most popular search engines worldwide with 90 % market share
- 5 Nordic destinations: Finland, Denmark, Iceland, Norway, Sweden
- 19 Target Markets: Nordics, Baltic countries, Japan, Germany, USA, Russia, UK, France, China, Spain, Netherlands, India, Switzerland and South Korea
- Around 70 Brandtags divided into 3 families (Generic Information, Touristic Activities, Accommodation)
- Almost 300 Micro-Brandtags (E.g., Northern Lights, Cities, Saunas, Coastline)
- Years 2020 and 2019
- Based on the data provided by D2 Digital Demand, Bloom Consulting

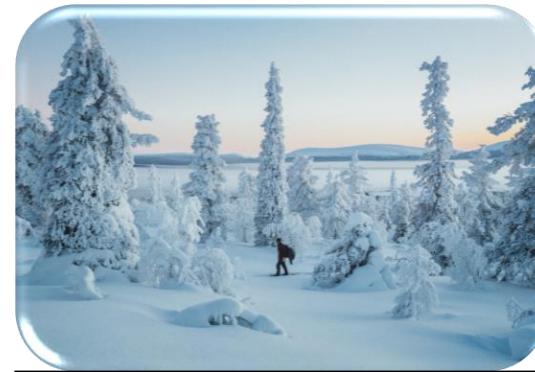
# Key Metrics

4,914,058  
Jan 2020 - Dec 2020

In 2020, Finland reached over 4,9 million tourism-related online searches, the annual decrease was around -11%



Iceland is the most popular Nordic country based on international web searches with over 11 million annual searches



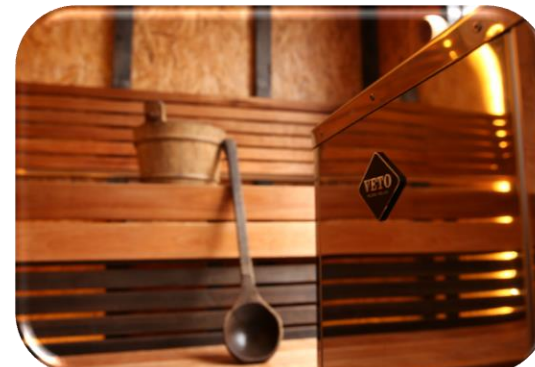
Foreign touristic searches about Finland focuses on winter-related topics



Japan is the most important target market for Finland regarding the number of touristic online searches



Lapland related touristic searches were the most popular among the foreign target markets



As a single topic, Saunas rose the highest interest among the foreign target markets with over 600 000 individual searches

# Top target markets

In 2020, Japan maintained its position as the top target market regarding the number of touristic online searches with over 500 000 annual searches.






Covid-19 had a clear effect on the relative growth volumes of foreign touristic online searches which led to the decrease in touristic online searches. The annual decrease regarding Finland related searches was around 11%

Especially Russia and China lost a great number of searches from 2019, -36% and -63%, respectively.

However, as a positive note, United States, the Netherlands, and India showed a growing interest towards Finland in terms of touristic online searches.

There were around 850 000 domestic searches about Finland in 2020

Target Market Distribution

Rank	Flag	Country	Searches	Growth
1		Japan	501,139	-13.8%
2		Germany	486,951	-3.2%
3		United States	466,861	5.6%
4		Russia	350,625	-36.3%
5		United Kingdom	339,392	-6.8%
6		France	207,911	-17.5%
7		China	201,596	-63.3%
8		Spain	185,194	-11.0%
9		Netherlands	182,268	24.5%
10		India	172,341	5.7%

# Top microtags

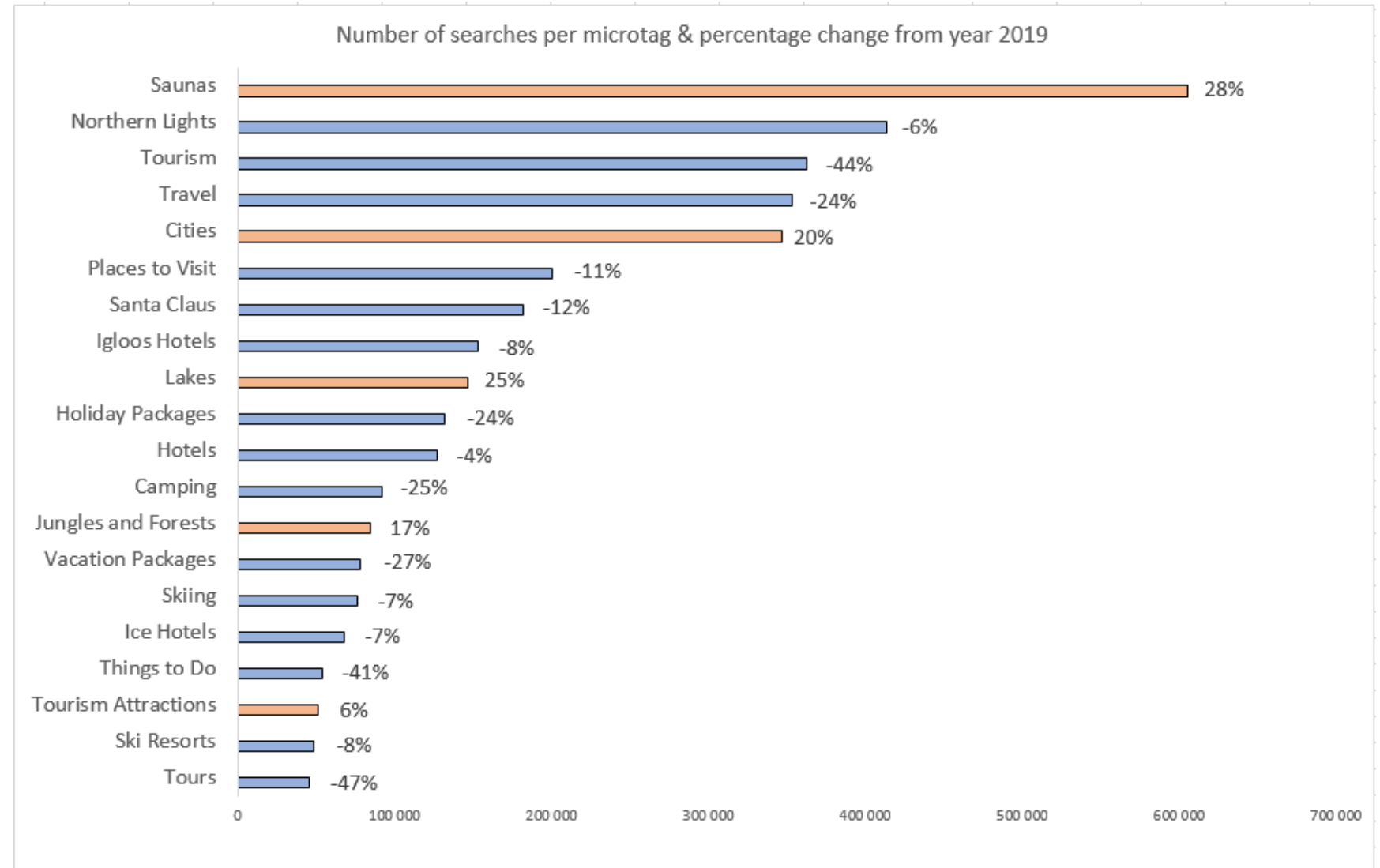
Topics with positive growth are marked with red bars, negative with blue.

Finland is recognized as a country of Saunas and winter-related topics, such as Northern Lights, Santa Claus and Igloo Hotels.

Saunas claimed the top spot in terms of the most popular search topic, ahead of Northern Lights and Tourism.

The annual decrease in total searches, mostly due to the Covid-19, resulted that growth percent was mostly negative among the top 20 search topics

Saunas, Lakes, and Cities enjoyed the highest relative growth numbers, 28%, 25%, and 20%, respectively.



All of the Nordic countries have suffered from Covid-19, as growth numbers are mostly negative.

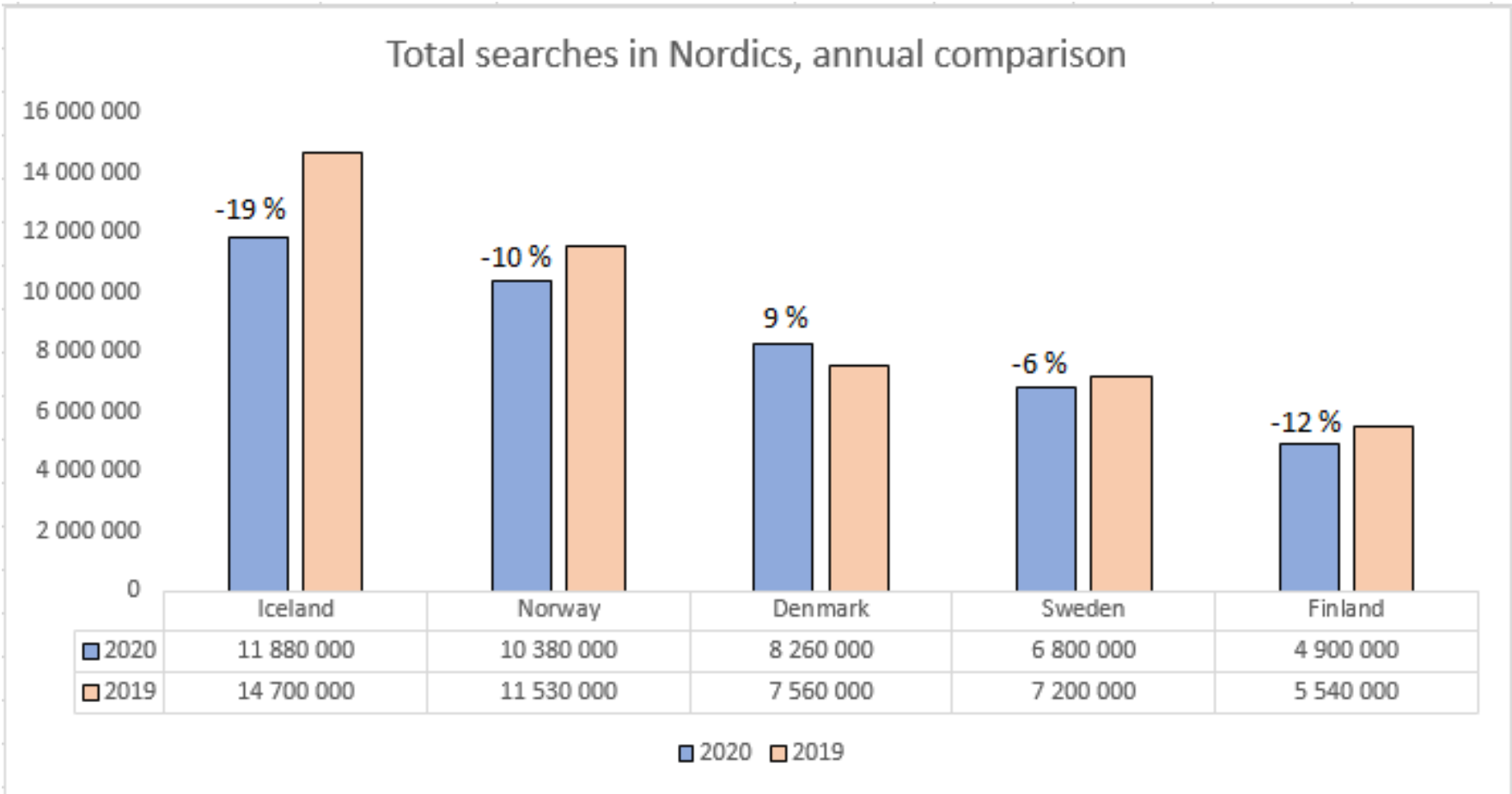
Iceland had seen the most drastic decrease in the number of touristic online searches, nearly -20%.

Overall, Nordic countries lost around -9% of searches compared to the year 2019.

Seasonality of international searches regarding the Nordic countries focus mostly on the summer and secondly into the January and February.

Denmark is an exception with a relative growth of 9% from the year 2019. This could be due to the loosened Covid-19 travel regulations in Summer 2020 ([Denmark to re-open borders, Summer 2020](#)) and easier access for Central European tourists compared to other Nordic countries. The most popular touristic online search topic of Denmark was 'Holiday Apartments', which could indicate high travel intentions due to loosened covid restrictions.

# Nordic comparison





The following chart represents the top 10 online touristic searches in the whole Nordic area.

Highlighted bars are the ones that are represented in Finland's Top 10 searches as well.

Relative change rates in micro-brandtags:

**Travel:** Finland -24% vs. Nordic -7%

**Northern Lights:** Finland -6% vs. Nordic -3%

**Tourism:** Finland -44% vs. Nordic -42%

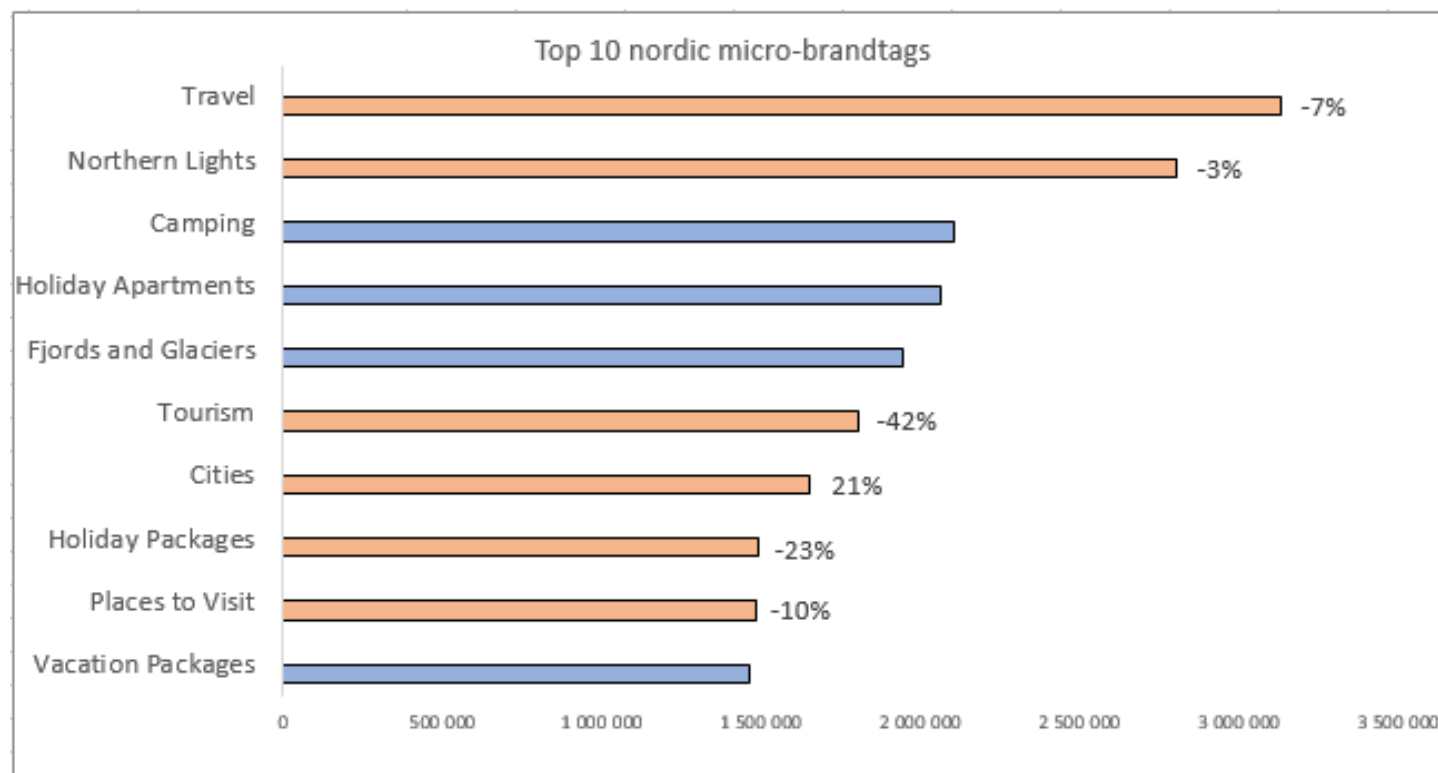
**Cities:** Finland 20% vs. Nordic 21%

**Holiday Packages:** Finland -24% vs. Nordic -23%

**Places to Visit:** Finland -11% vs. Nordic -10%

These numbers indicate that Finland has lost more searches compared to its nordic peers, by individual topics and on average as well.

# Nordic comparison





A person wearing a bright yellow raincoat and olive green pants is lying on their back on a mossy, rocky outcrop. They are looking up at the sky with their arms behind their head. In the background, a calm lake stretches across the middle ground, with a small waterfall visible in the distance. The surrounding landscape is densely forested with green trees under a soft, overcast sky.

# Finland's regional KSP's (Key Selling Points)



# Definition of the Key Selling Points (KSP)

- The KSP (chosen micro-brandtags) are meant to represent the region's selling points in international markets, while still differentiating them from the supply of Finland in general.
- Some of the KSP have been assigned for many different regions, but the majority of them are assigned only for one region. (Example: National Parks for all regions)
- Search numbers of KSP, presented in the following slides, represents the number of international searches in Finland as a whole. As an example, the 'Saunas' microtag represents sauna-related searches in the whole of Finland, not only in the Lakeland area.

An aerial photograph of the Lakeland region, showing a vast expanse of water dotted with numerous forested islands and peninsulas. The water is a deep blue, and the islands are covered in dense green trees. The sky is a mix of blue and white clouds, suggesting a bright but slightly overcast day. The perspective is from a high angle, looking down at the water and islands.

# Lakeland region

# Lakeland

911K

Searches 2020

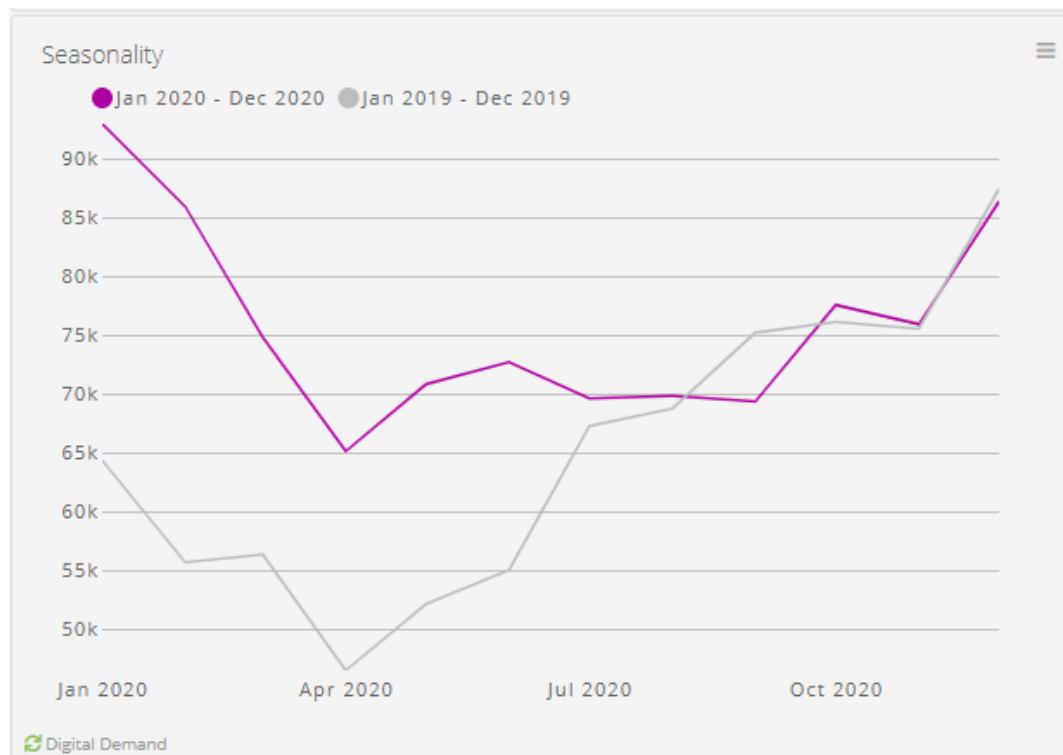
17 %

Change 2020/2019

Lakeland region's Key Selling Points (KSP) have enjoyed an increase of 17% in the number of annual international searches during the year 2020.

Lakeland area's KSP have over 900 000 annual searches

Saunas, the most popular search topic, has been assigned entirely to the Lakeland area. This increases its search numbers drastically.



Seasonality of searches regarding the Lakeland region focused into the end of the year in 2020 as well as in 2019. In both compared years the number of searches was at its lowest in April. However, seasonality statistics of Lakeland are highly impacted by the search amount of Saunas. For example, searches related to Lakes and Cottages focused clearly to the summer months.

Micro Brandtag	Searches 2020	Change
Saunas	605,742	28 %
Lakes	146,441	25 %
Cottages	41,733	-20 %
Fishing	31,761	-23 %
Cabins	30,386	20 %
Hiking	18,642	-17 %
National Parks	14,419	-49 %
Cycling	10,531	0 %
Boating	6,917	-3 %
Wildlife	4,754	-7 %

The graph represents the **Total number** of searches per topic in Finland. As an example, the 'Fishing' microtag represents Fishing-related searches in the whole of Finland, not only in the Lakeland area.

# TOP KSP of Lakeland: Saunas

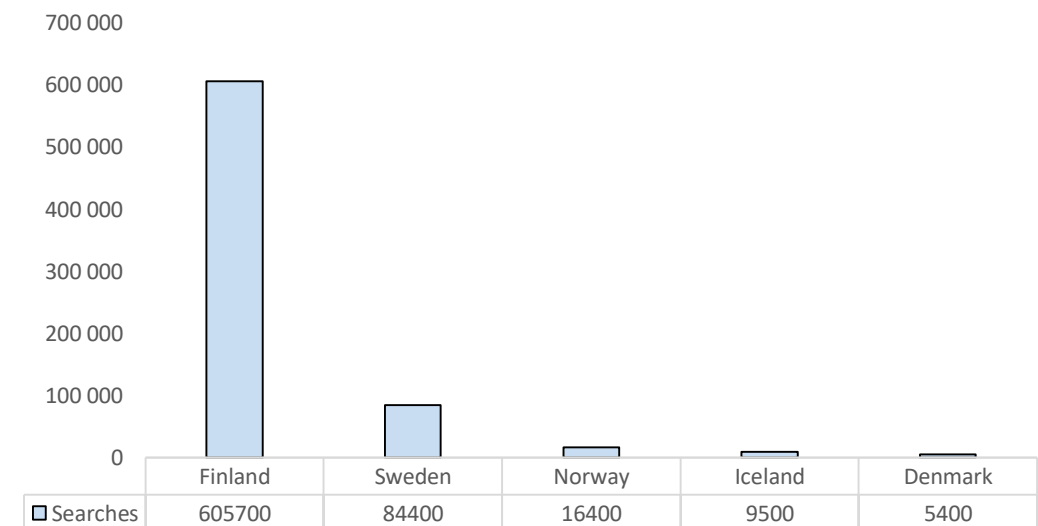
Top 5 target markets regarding the number of searches of 'Saunas' are listed on the right side. Japanese tourists have shown the greatest amount of interest in the topic with over 110 000 searches.

Growth percentages regarding the topic have increased around 30% from the year 2019 in the Top 5 target markets, excl. France. With these results, it can be confirmed that saunas are extremely important for Finnish country image.

1		Japan	112,303	43.3%
2		United States	92,557	35.4%
3		Germany	56,300	17.5%
4		Netherlands	34,080	44.3%
5		France	19,801	-1.7%

In nordic country comparison, the foreign interest towards saunas has strongly concentrated on Finland. The branding of Finland as a country of saunas has come off very well in the last years. Saunas are considered as a part of the wellbeing movement that is currently trending all around the world. This might have its impact on the high growth of sauna-related searches.

Number of searches: Saunas





# TOP KSP of Lakeland: Lakes

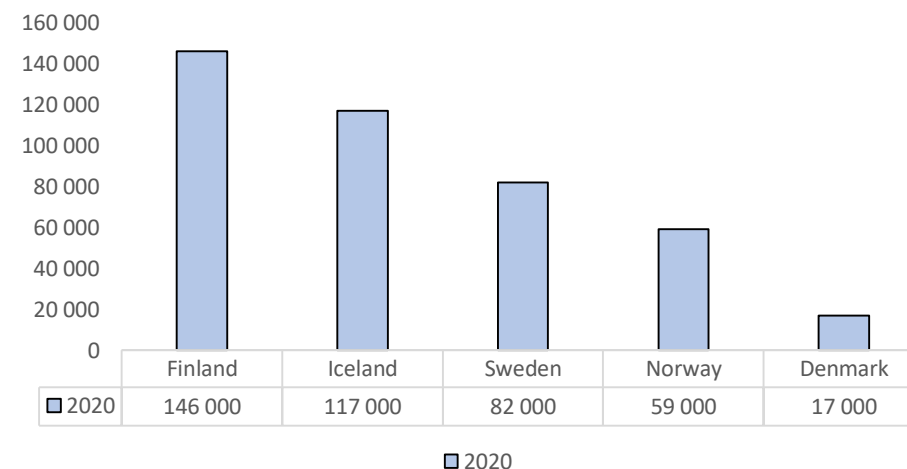
Top 5 target markets regarding the number of searches of 'Lakes' are listed on the right side. French tourists have shown the greatest amount of interest in the topic with around 17 000 searches. The number of searches by the French have increased by 10% from the year 2019.

Overall, total interest towards lakes has grown from the year 2019.

1		France	17,591	10.4%
2		Germany	10,780	7.7%
3		Russia	9,814	2.8%
4		Estonia	8,125	86.0%
5		Spain	7,817	56.0%

As a land of thousand lakes, Finland holds the top place amongst the Nordic countries regarding the searches related to lakes.

Number of searches: Lakes





An aerial photograph of the Helsinki region, featuring the Helsinki Cathedral in the foreground. The cathedral has a large green copper dome and a white facade. The city is built on islands and connected by bridges, with a harbor area visible on the left. The text "Helsinki region" is overlaid in the center.

# Helsinki region



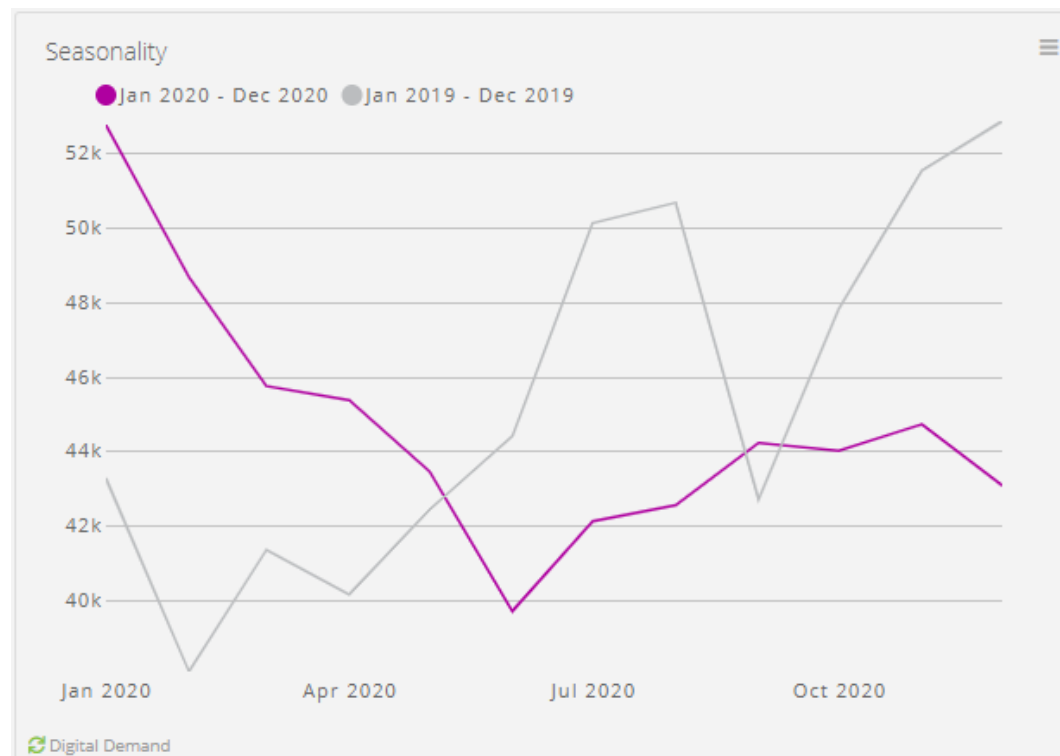
# Helsinki

537K

Searches 2020

-2 %

Change 2020/2019



Seasonality of searches regarding the Helsinki region spiked in summer and last months of the year in 2019. Searches regarding Helsinki Area's KSP have not recovered from the Covid-19 pandemic entirely, as the levels of 2019 have not been reached again.

Micro Brandtag	Searches 2020	Change
Cities	346,734	20 %
Restaurants	22,758	-5 %
Food Tourism	21,318	-12 %
Museums	20,783	-24 %
Cafes	18,273	11 %
Shopping	17,616	-55 %
National Parks	14,419	-49 %
Cruises	12,558	-51 %
Sport Events	11,554	-18 %
Villages	11,451	44 %
Cycling	10,531	0 %
Events	9,344	-38 %
Music Events	8,858	-40 %
Boating	6,917	-3 %
Conferences	2,919	1 %

The graph represents the **Total number** of searches per topic in Finland. As an example, the 'Museum' microtag represents Museum-related searches in the whole of Finland, not only in the Helsinki area.

Helsinki region's Key Selling Points (KSP) have suffered only a slight decrease of -2% in the number of annual searches during the year 2020.

Helsinki area's KSP have around 540 000 annual searches.

Cities, the most popular search topic, have been assigned entirely to the Helsinki area, even though there are other cities in Finland as well. However, if a foreign tourist is planning for a city destination holiday in Finland the most popular choice is obviously Helsinki.

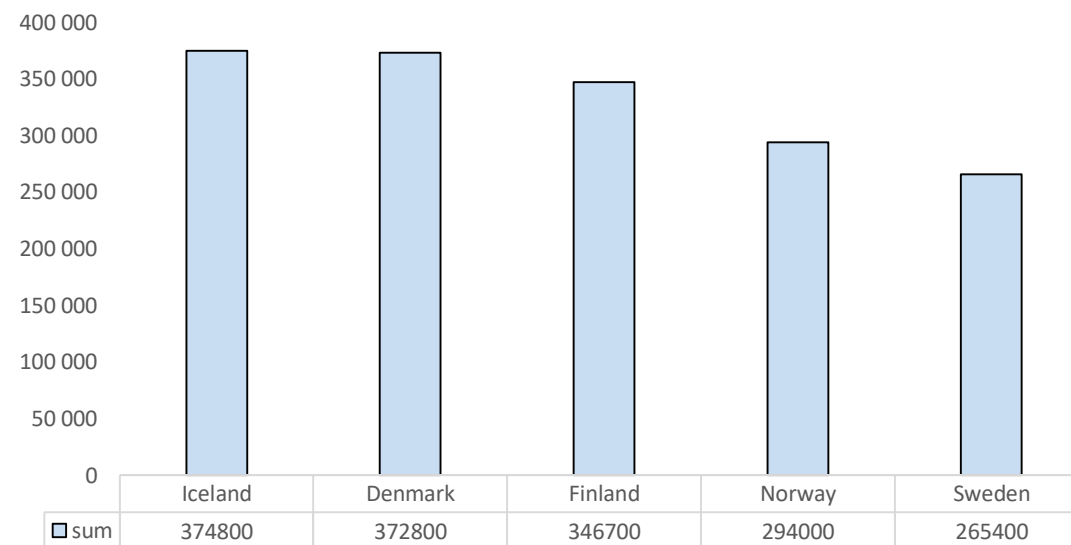
# TOP KSP of Helsinki region: Cities

Top 5 target markets regarding the number of searches of 'Cities' are listed on the right side. Estonians have shown the greatest amount of interest towards cities in Finland with around 46 000 searches. The number of searches by them have increased by 44% from the year 2019. This could be due to the Covid-19 because of easy access and loosened travel restrictions between Finland and Estonia.

1		Estonia	46,084	44.2%
2		United States	36,646	18.7%
3		Germany	24,632	9.3%
4		India	19,132	45.0%
5		Sweden	16,635	22.7%






In Nordic country comparison, Finland is ranked 3rd only by a small margin compared to its peers, Iceland and Denmark. It is interesting to find out that 'Cities' in Finland outscores Sweden by 80 000 searches.

Number of searches: Cities



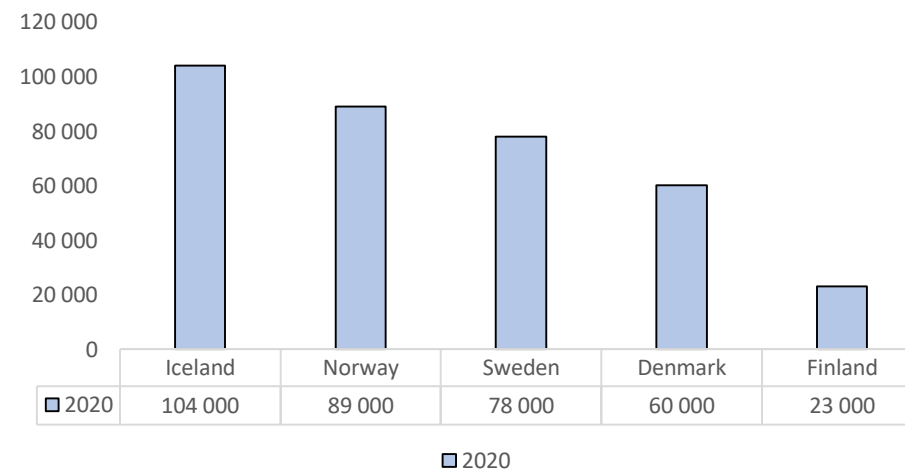
# TOP KSP of Helsinki region: Restaurants

Top 5 target markets regarding the number of searches of 'Restaurants' are listed on the right side. The US citizens have shown the greatest amount of interest towards restaurants in Finland with a quite small amount of 6000 annual searches. The number of searches by US citizens have increased by 43% From the year 2019.

1		United States	5,970	42.9%
2		Japan	1,228	-29.5%
3		Spain	1,030	-17.0%
4		United Kingdom	731	-32.9%
5		Sweden	681	-1.0%

In Nordic country comparison, Finland is ranked last regarding the restaurant-related international searches. This may be due to the lack of clear branding regarding Finnish cuisine. Under the Food tourism search topic, Finland has over 20 000 additional searches, mostly done by Japanese citizens.

Number of searches: Restaurants





A wide-angle photograph of a winter landscape in the Lapland region. In the foreground, several evergreen trees are heavily covered in snow, their branches drooping under the weight. A large, snow-laden tree stands prominently on the right side of the frame. The ground is a smooth, white expanse of snow. In the background, a valley stretches out, featuring a winding river, a bridge with multiple arches, and distant hills. The sun is low on the horizon, casting a warm, golden glow across the sky and the landscape. The sky is filled with soft, wispy clouds, and the overall atmosphere is serene and cold.

# Lapland region



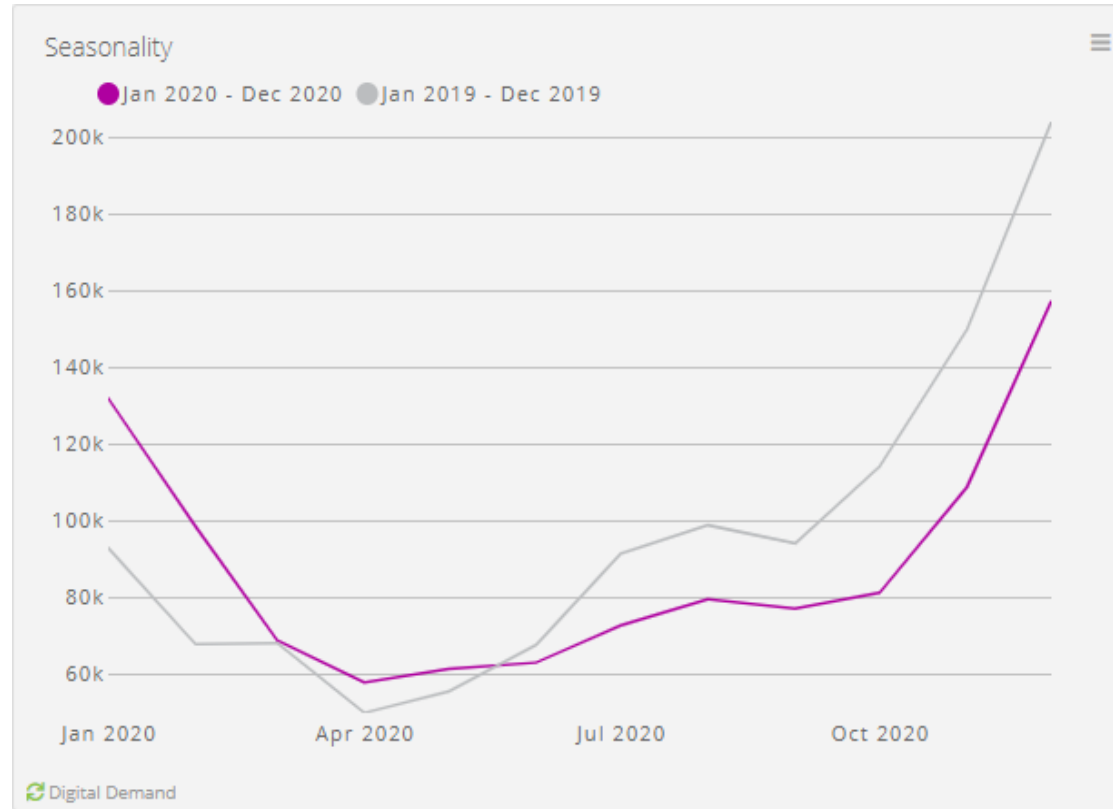
1M

Searches 2020

-8 %

Change 2020/2019

# Lapland



Seasonality of searches regarding the Lapland region has a clear focus on the winter months. The graph visualizes clearly that in both years, 2019 and 2020, December has been the most popular month.

Micro Brandtag	Searches 2020	Change
Northern Lights	413,903	-6 %
Santa Claus	181,883	-12 %
Igloos Hotels	152,771	-8 %
Ice Hotels	68,419	-7 %
Cottages	41,733	-20 %
Fishing	31,761	-23 %
Cabins	30,386	20 %
Midnight Sun	29,398	-15 %
Reindeers	27,546	0 %
Hiking	18,642	-17 %
Sami	17,151	29 %
Arctic Hotels	16,748	118 %
National Parks	14,419	-49 %
Cycling	10,531	0 %
Wildlife	4,754	-7 %

The graph represents the **Total number** of searches per topic in Finland. As an example, 'National Parks' microtag represents National Park-related searches in the whole of Finland, not only in the Lapland area.

Lapland region's Key Selling Points (KSP) have suffered a decrease of -8% in the number of annual searches during the year 2020.

Even though, the relative growth ratio is negative Lapland area is the most popular area in terms of KSP searches with its 1 million annual searches




Lapland area's KSP are mostly focused on the winter months.

In the year 2019 Northern Lights were the most popular search topic in Finland, but in 2020 it has lost its position to Saunas.

# Top KSP of Lapland: Northern Lights

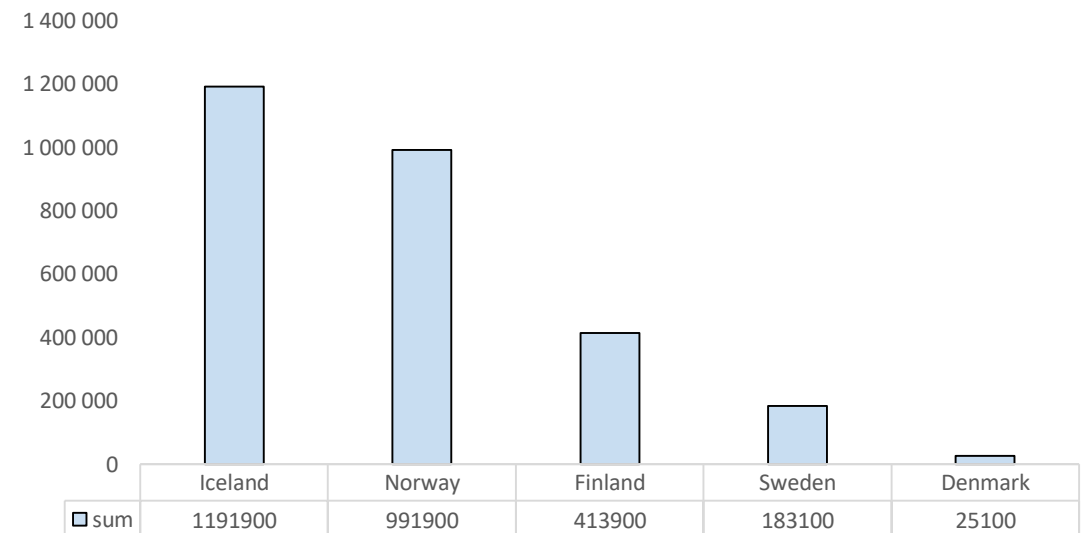
Top 5 target markets regarding the number of searches of 'Northern Lights' are listed on the right side. Japanese tourists have shown the greatest amount of interest in this topic as well, with around 50 000 searches.

Change percentages regarding the northern lights have decreased from the year 2019 in the Top 5 markets, excl. India.

1		Japan	50,865	-12.7%
2		Germany	46,683	-10.7%
3		United States	37,865	-8.0%
4		United Kingdom	29,737	-22.8%
5		India	27,865	20.5%

In Nordic country comparison Finland is ranked 3rd, the chart illustrates that the mental image of the northern lights are more associated with Iceland and Norway than Finland. Interest towards northern lights have decreased slightly from 2019 in the Nordic area.

Number of searches: Northern Lights



# Top KSP of Lapland: Igloo Hotels

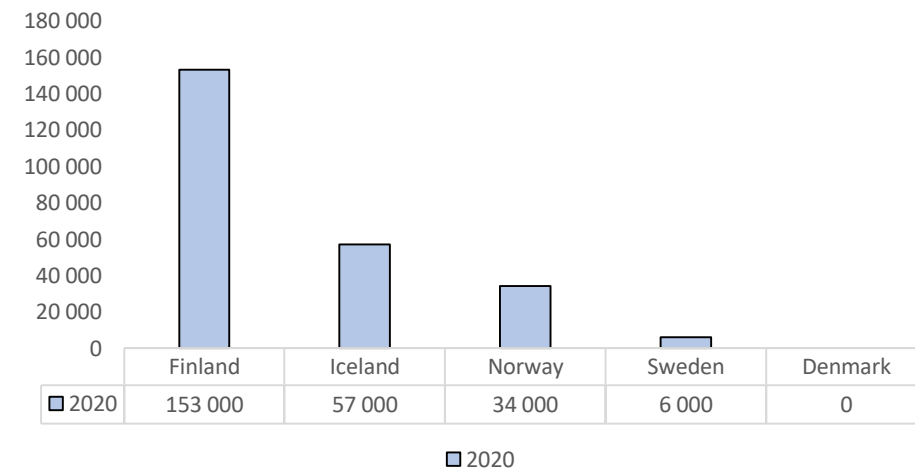
Top 5 target markets regarding the number of searches of 'Igloo Hotels' are listed on the right side. The US citizens have shown the greatest amount of interest in this topic, with 35 000 searches. Number of searches regarding Igloo hotels has naturally decreased due to the Covid-19 pandemic's effects on tourism and accommodation.

1		United States	34,953	-11.0%
2		United Kingdom	17,149	-14.9%
3		Germany	13,721	-30.4%
4		India	7,591	24.1%
5		Spain	5,993	-18.6%

The branding of luxurious Igloo hotels that are located in the middle of nowhere, under the shining northern lights, has been successful in terms of international searches.

As the chart shows, Igloo hotels are mostly associated with Finland and thus, they hold the top spot clearly in the Nordic comparison.

Number of searches: Igloo Hotels





A wide-angle photograph of a coastal region at sunset. In the foreground, a series of large, dark, jagged rocks form a breakwater that extends from the bottom left towards the center of the frame. The water is dark blue with gentle ripples. In the middle ground, the sun is a bright, glowing orb just above the horizon, casting a long, shimmering reflection across the water's surface. The sky is filled with soft, wispy clouds in shades of orange, pink, and purple, with some darker clouds on the left. The overall mood is serene and picturesque.

Coastal region



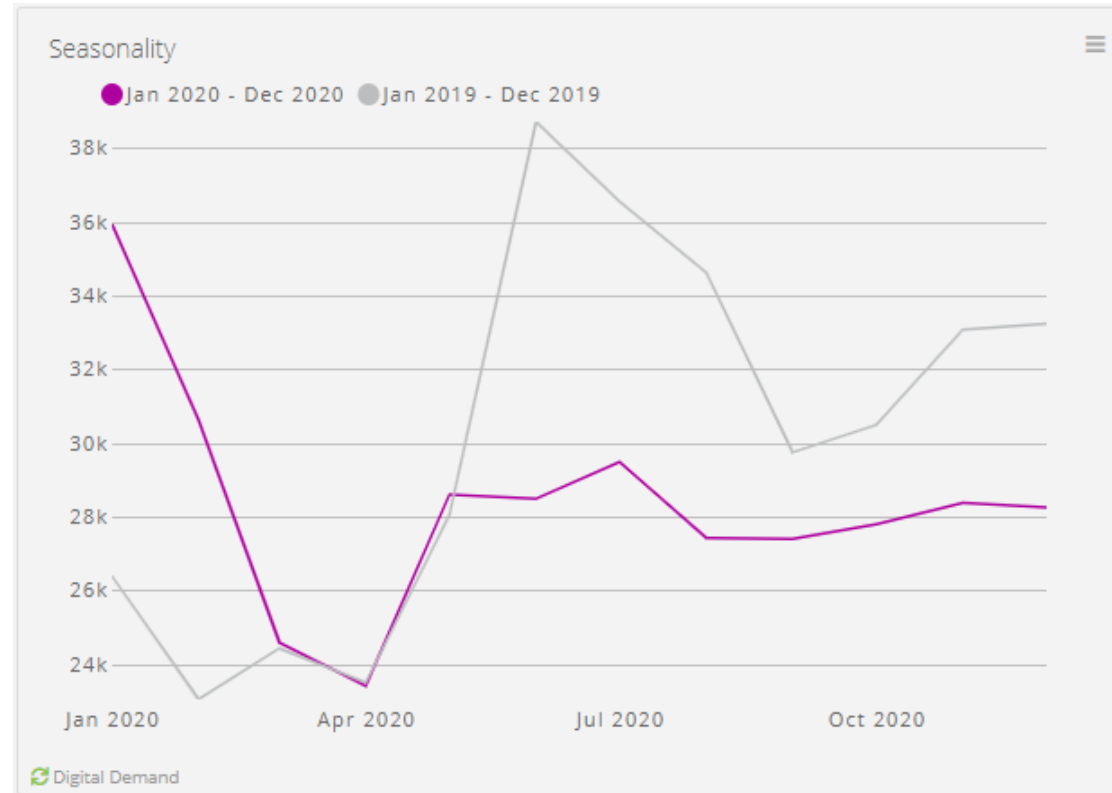
# Coast and Archipelago

341K

Searches 2020

-6 %

Change 2020/2019



Seasonality of searches regarding the Coastal region spiked in summer of the year in 2019. Searches regarding Coastal Area's KSP's have not recovered from the Covid-19 pandemic entirely, as the levels of summer 2019 were not achieved in summer 2020.

Micro Brandtag	Searches 2020	Change
Coastline	43,606	6 %
Cottages	41,733	-20 %
Islands	38,558	1 %
Fishing	31,761	-23 %
Beaches	30,642	54 %
Cabins	30,386	20 %
Restaurants	22,758	-5 %
Food Tourism	21,318	-12 %
Wood Houses	16,972	45 %
National Parks	14,419	-49 %
Cruises	12,558	-51 %
Villages	11,451	44 %
Cycling	10,531	0 %
Boating	6,917	-3 %
Sea	3,450	41 %
Lighthouses	2,804	53 %

The graph represents the **Total number** of searches per topic in Finland. As an example, 'Beaches' microtag represents Beach-related searches in the whole of Finland, not only in the Coastal area.


Coastal region's Key Selling Points (KSP) have suffered the decrease of -6% in the number of annual searches during the year 2020.

The coastal area is the least known region of Finland in terms of international KSP searches with its 340 000 annual searches

The most popular search topics are mostly summer-related.

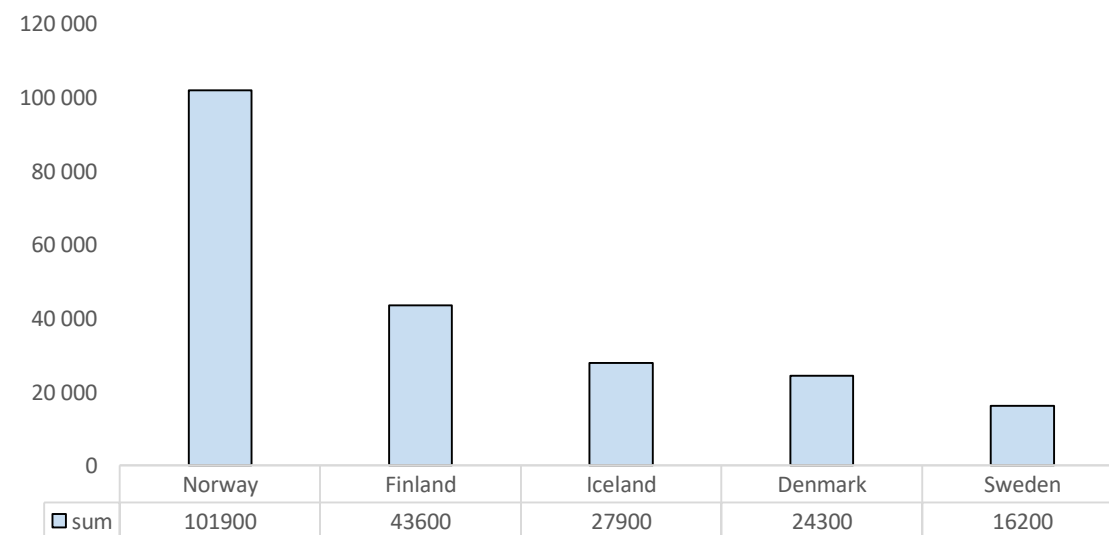
# Top KSP of Coast and Archipelago: Coastline

Top 5 target markets regarding the number of searches of 'Coastline' are listed on the right side. The number of searches regarding the 'Coastline' are rather low, compared to the previously analyzed topics such as 'Saunas'. Naturally, if a foreign tourist is willing to spend his/her holiday on the beaches or coastal areas, Finland is not the most obvious choice.

1		United States	11,584	18.0%
2		Russia	5,365	-11.7%
3		United Kingdom	3,360	-38.3%
4		France	2,080	-9.0%
5		India	2,046	25.4%

In Nordic country comparison, Finland is ranked 2nd, after Norway which coastline is famous because of its impressive rugged fjords. Compared to the previously analyzed topics, 'Coastline' is not the absolute strength factor of the total tourism of any Nordic country.

Number of searches: Coastline



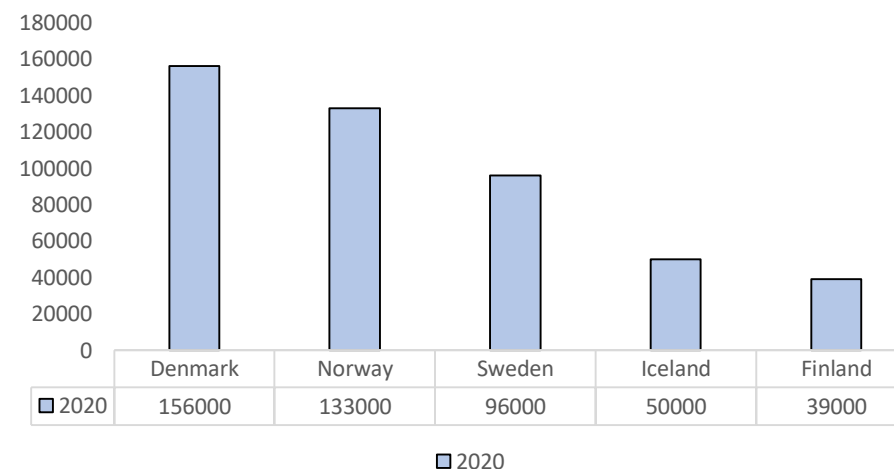
# Top KSP of Coast and Archipelago: Islands

Top 5 target markets regarding the number of searches of 'Islands' are listed on the right side. The number of searches regarding the 'Islands' are rather low, as they were in the previously analyzed topic, 'Coastline'.

1		United States	4,086	22.2%
2		Germany	3,074	11.4%
3		France	2,954	-69.9%
4		United Kingdom	2,395	16.3%
5		India	2,350	207.2%

In Nordic country comparison, Finland is last, even though Finnish archipelago is highly recognized as a unique and beautiful tourism destination. Based on the following numbers, there could be room for the campaign regarding the promotion for "World's largest archipelago".

Number of searches: Islands



# Accommodation





# Accommodation in Finland

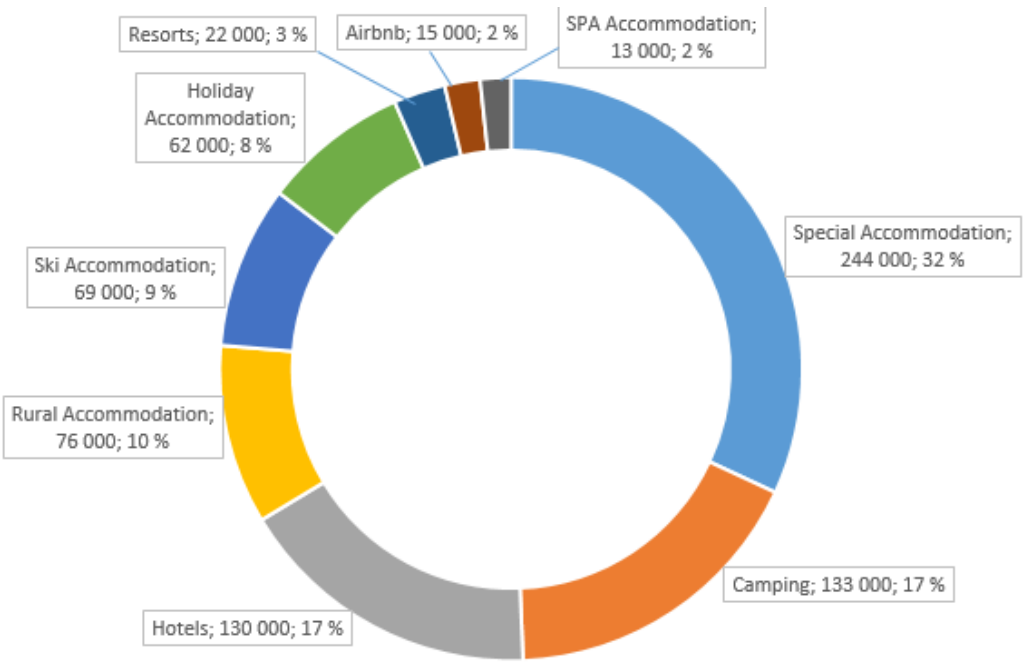
Total accommodations  
791,416

The purpose of the slide is to visualize what types of accommodation have risen the most interest in terms of international searches.

The following accommodation categories consist of various different search topics. For example, Rural accommodation contains topics: Cottages, Farmhouses, Rural Hotels, Rural Houses and Wood Houses.

Natural lifestyle is highlighted in the searches very clearly as 3 out of 4 top accommodation categories (special accommodation, camping, and rural accommodation) are somehow related to the nature.

In terms of seasonality, accommodation-related searches have occurred mostly in the winter months.



The following graph represents the amount and division between international searches related to the accommodation categories in Finland. The graph contains 9\* of the most popular accommodation categories and covers around 97% of total international accommodation searches related to Finland.

Special accommodation	Searches
Igloos Hotels	152 771
Ice Hotels	68 419
Arctic Hotels	16 748
Tree House Hotels	5 017
Couch Surfing	522
Airport Accommodation	387
Underwater Hotels	110
Naturist Accommodation	0

The graph represents how searches have divided between the components of the most popular accommodation group in Finland, Special Accommodations.

\*few categories are left out of the graph due to the interpretability reasons, as the smaller categories would have covered under 0,5% of total searches graph would have become too full.

# Seasonality in accommodation

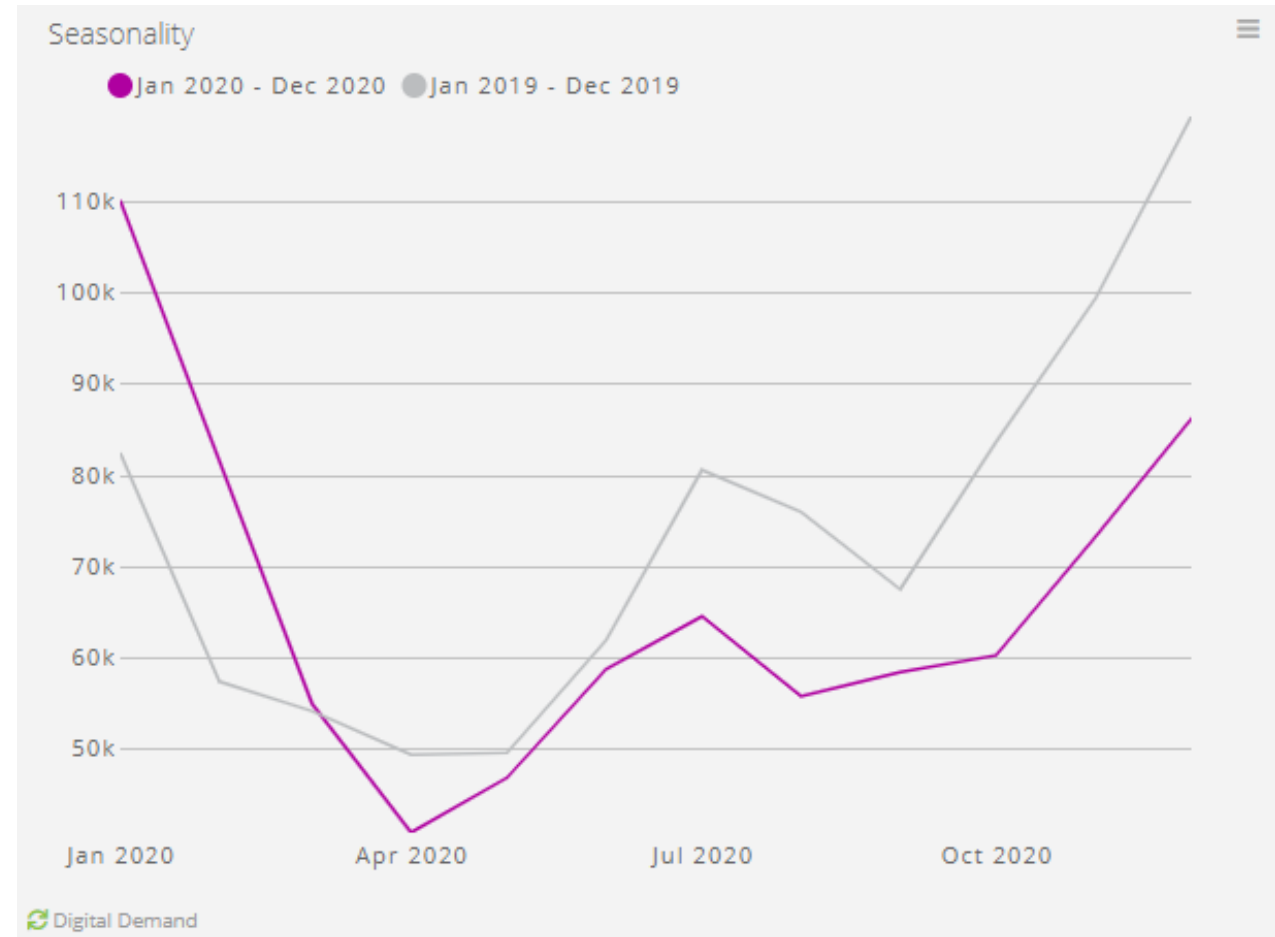
According to the seasonality statistics of accommodation searches, it can be discovered that winter is more popular than summer in terms of international accommodation searches towards Finland.

The most popular individual search topics in winter 2020:

- #1 Igloo Hotels (64 000)
- #2 Traditional Hotels (45 000)
- #3 Ice Hotels (33 000)

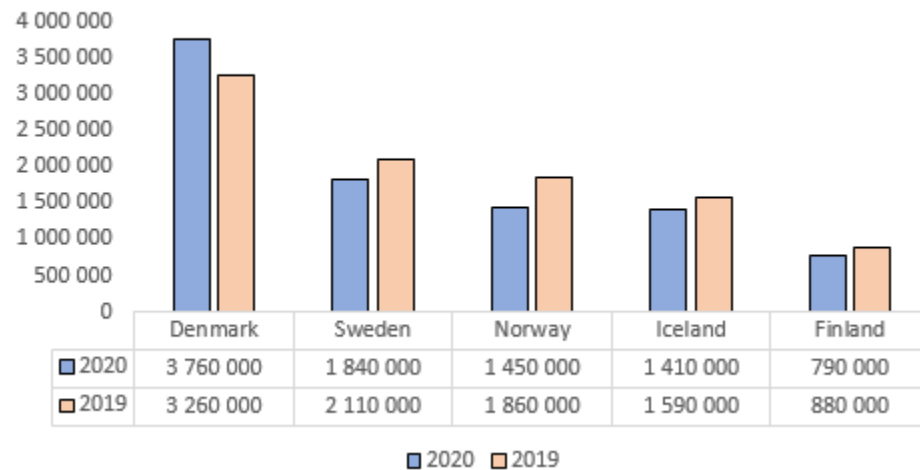
Summer 2020:

- #1 Camping (39 000)
- #2 Igloo Hotels (28 000)
- #3 Traditional Hotels (27 500)



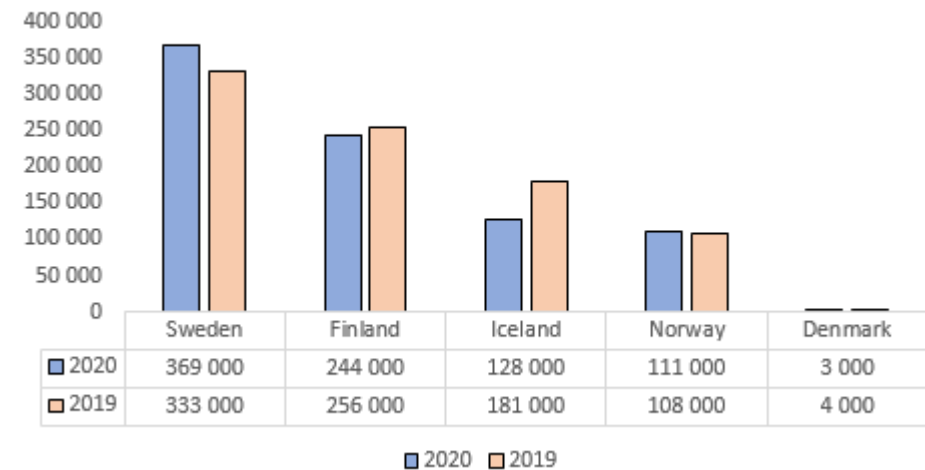
# Nordic Comparison: Accommodation

Nordic Comparison total accommodation



In terms of accommodation searches, Finland is last in the Nordic comparison. According to the seasonality statistics, Finland is on the same level with other Nordic countries during the winter months. However, during the summer months, other Nordic countries than Finland have a clear spike in the number of searches.

Special accommodation searches in Nordics



In the most popular accommodation category in Finland (special accommodation), only Sweden is ahead of Finland in terms of international searches. This is mainly due to the high number of searches regarding ice hotels in the Swedish Lapland.

A close-up photograph of a hand holding a brown pine cone. The pine cone is the central focus, with its scales clearly visible. The hand is positioned at the bottom, with fingers gently gripping the cone. The background is a soft-focus forest scene with tall trees and dappled sunlight, creating a bokeh effect. The text "Domestic searches" is overlaid in the center in a white, sans-serif font.

**Domestic searches**



849K

## Searches 2020

39 %

Change 2020/2019

# Domestic searches

The covid-19 pandemic turned out as a great success for domestic tourism in Finland. The number of tourism-related searches grew 39% from year 2019

Naturally, the interests of domestic tourists vary a lot from their international peers. The most interesting topic for domestic tourists were 'Cities', 'National Parks' and Spa and Beauty Treatments.

Even though it is important to have a vivid domestic tourist scene, the focus of Visit Finland's operations is to promote international tourism. Foreign growth is the only way to reach the growth in total visitor counts and the total revenues generated by the tourism industry in Finland.



# More detailed insights about travel searches:

## Finland's Digital Demand Power BI

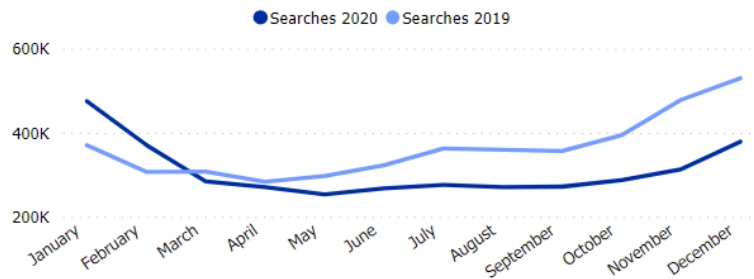
### TOURISM-RELATED ONLINE SEARCHES BY MARKET IN 2020 vs. 2019



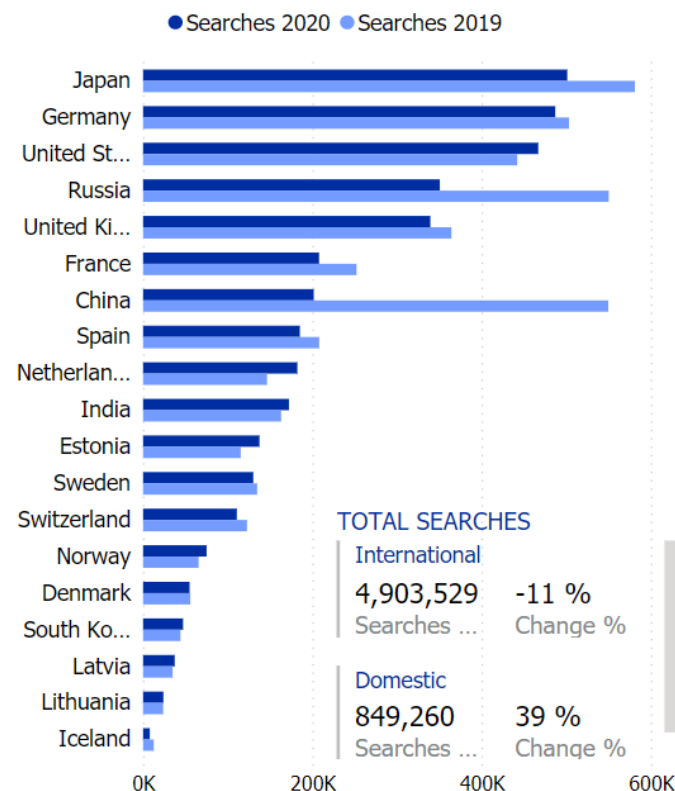
Zoom in and click to choose market



#### SEASONALITY OF SEARCHES IN THE 19 CHOSEN INTERNATIONAL MARKETS



#### NUMBER OF SEARCHES BY MARKET 2020/2019



#### TOTAL SEARCHES

International  
4,903,529  
Searches ...  
-11 %  
Change %

Domestic  
849,260  
Searches ...  
39 %  
Change %

# About the data

The data collected from the Digital Demand –D2© tool provides an understanding of the international demand for a specific Country. This information is obtained from the analysis of the specific keywords that global citizens use on the most popular search engines worldwide. It is fair to say that the results of the online searches reflect the proactive interest of the global citizens, through their exposure to all media channels and word of mouth. Therefore, we can infer that Online Searches = Indicator of Real Demand.

The data in this report reviews the searches from 19 chosen markets concerning Finland as a destination.

## Data Organisation

Digital Demand has developed a classification system to define, rank, and compare the demand for any Country in the world based on a 5 levels structure.

Image 2. The Classification System used in the D2© software



Tourism brand dimension has its own classification system. The lower level are the keywords. The keyword combinations, including similar search term in different languages, are grouped into Micro-Brandtags, which belong to a specific Brandtag and Brandtag Family.

## Scope and Methodology

The D2 software gathers and analyses information for a specific country at a keyword level, guaranteeing that the searches gathered reflect the demand for each dimension. To capture the global appeal, the D2 algorithm runs more than 100k of keyword combinations for each dimension generated in 11 languages. By default, the software is customized to run searches in Chinese, English, French, German, Arabic, Italian, Japanese, Korean, Portuguese, Russian and Spanish. The software can later be customized and include additional languages to capture the demand of specific target markets.

D2© software gets information from the most popular search engine in the world with over a 90% global market share, and also specific “local” search engines. For China, the data from the most popular search engine in the country has been included in the study. For other markets such as Japan, the Russian Federation and the Republic of Korea, the search volume has been adjusted to represent the country sample.



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