

Bloom Consulting COUNTRIES, REGIONS & CITIES

Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q4 2024

Version 1.0

February 12th, 2025

Introducing Digital Demand

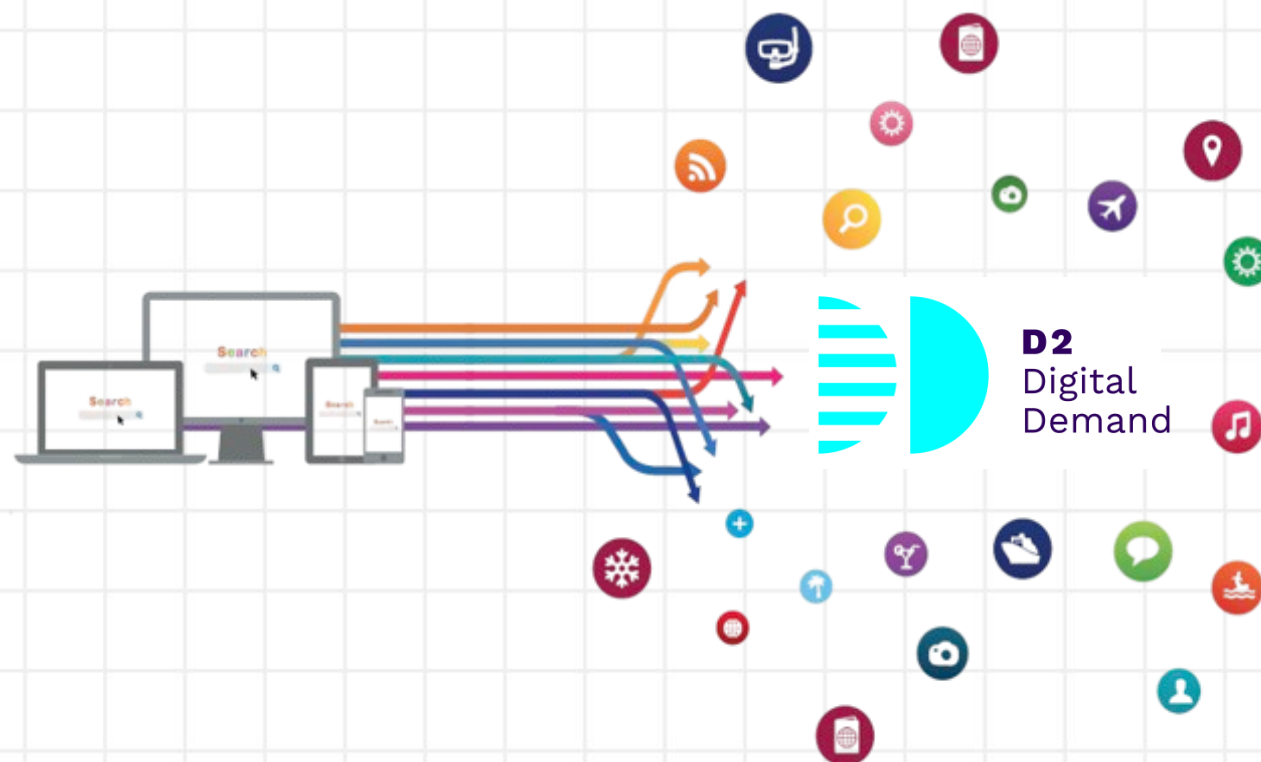
The data collected from the D2 – Digital Demand © tool provides an understanding of the international demand for a specific country, region, or city. This information is obtained from analyzing the specific keywords that global citizens use on the most popular search engines worldwide.

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 sources used today.

Researchers, travelers, investors, professionals, and others use search engine results to inform their decisions about 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



Conclusions Q3 2024

1. Finland is one of the two countries to see an increase in search volume compared to the same period last year.
2. August experiences strong growth in search volumes, continuing Finland's positive trend.
3. Leading themes highlight generic and winter trends, with no summer-related searches present.
4. All top themes grow, especially Restaurants, Cities and Hotels.
5. Minor position changes in both regional and distant markets.
6. Distant markets are experiencing the highest growth, while half of the markets are experiencing a decline in search volumes.
7. The Finnish market experiences a decline in search volumes for the first time in years.

Conclusions

Q4 2024 data refresh

Conclusion 1

Finland continues to grow steadily, nevertheless slower than Iceland and Denmark.

Iceland secures the top position in both international search volume (6,6 million) and growth rate, with an impressive increase of +24,4%.

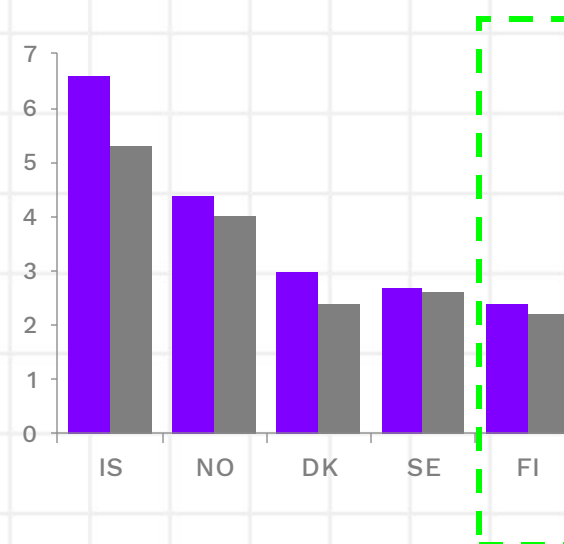
Norway follows in second place for total international searches, with 4,4 million, but ranks only fourth in growth rate, recording a steady +9,0%.

Denmark, despite registering the second highest growth rate of +22,2% compared to the same period last year, ranks third in international searches with 3,0 million.

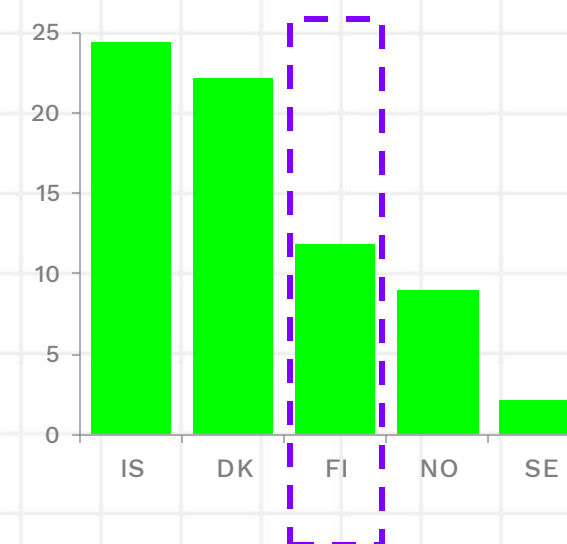
Finland, occupying the last position in total international searches with 2,4 million, demonstrates notable progress with an +11,8% growth rate, closing the gap with Sweden. Sweden ranks fourth in search volume with 2,7 million, but records only a slight increase of +2,1% compared to the same period last year.

Benchmark ranking Internationally

■ Q4 2024 ■ Q4 2023 | Searches in million



■ Growth %



Legend: IS - Iceland, NO - Norway, DK - Denmark, SE - Sweden, FI - Finland

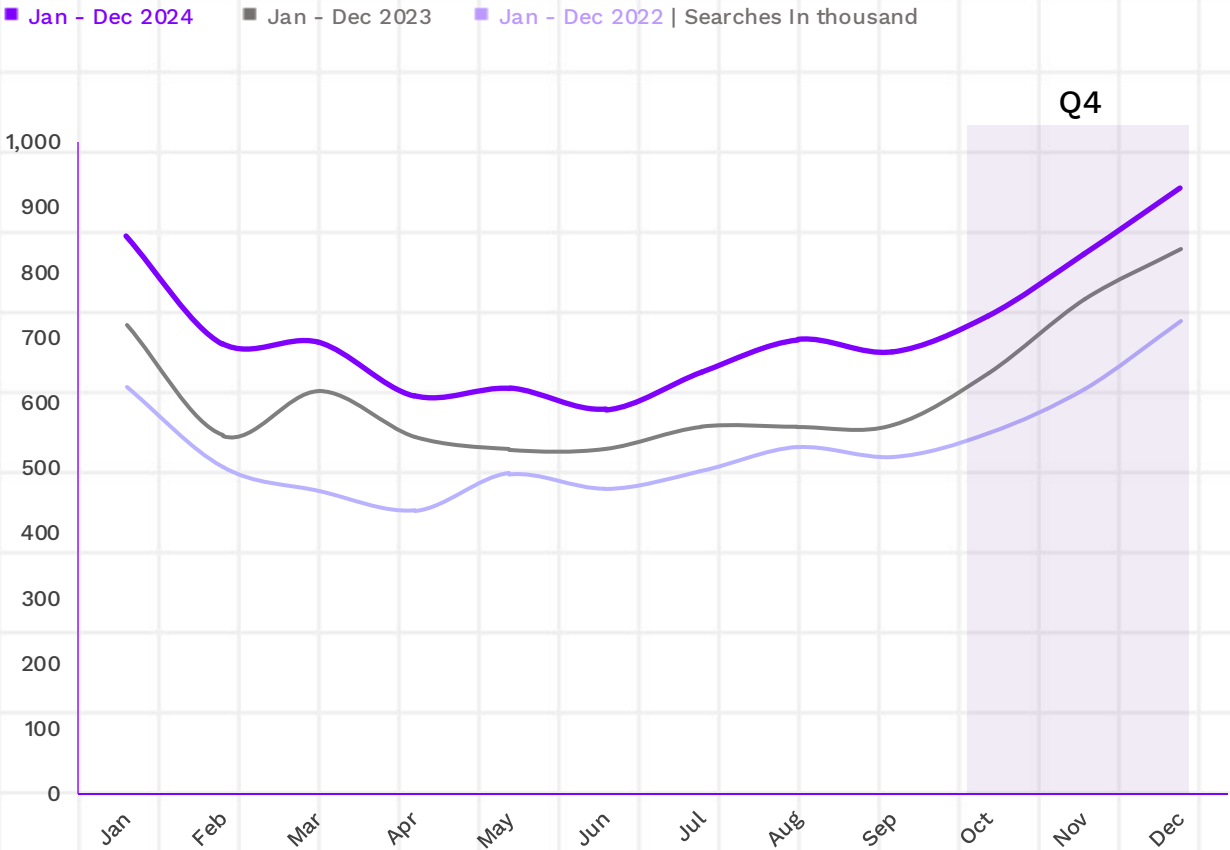
Conclusion 2

International search volume for Finland showed a consistent upward trend throughout Q4.

Search volume for Q4 2024 shows a steady increase compared to the same period in 2023. In October 2024, search volume rose by +14,3% compared to October 2023. November 2024 saw a growth of +9,9% compared to November 2023, and December 2024 recorded a +11,7% increase over December 2023.

There were no fluctuations in the search volume across the three months of Q4, indicating a consistent upward trend throughout the quarter, with 2024 search volumes consistently higher than those in 2023.

Seasonality of searches for Finland **Internationally**



Conclusion 3

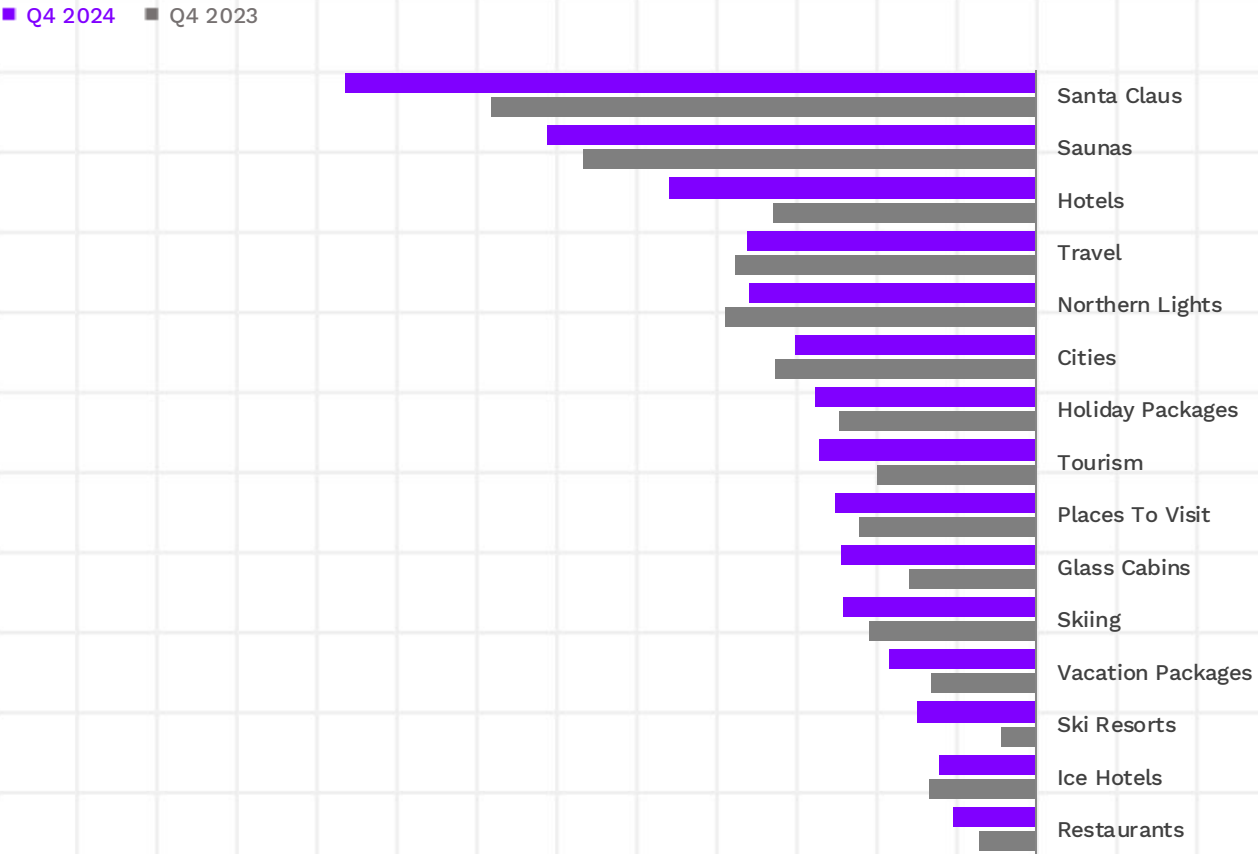
Winter-related searches remain among the most popular themes for Finland.

The most popular Micro-Brandtag for Q4 2024 is Santa Claus with 284K international searches. Sauna (201K) and Northern Lights (118K) are the two specific Micro-Brandtags that are in the top 5, while from the general category, only Hotels (151K) and Travel (119K) make it to the top 5.

Among winter specific Micro-Brandtags, the most searched are Skiing (79K), Ski Resorts (49K), and Ice Hotels (40K).

Holiday Packages (90K), Tourism (89K), Places to Visit (82K), and Vacation Packages (60K) are also among the most searched Micro-Brandtags, highlighting a strong interest in travel related topics.

Top 15 Micro-Brandtags for Finland Internationally



Conclusion 4

Winter accommodation
show the highest growth,...

Ski Resorts have seen the most significant increase in international search volume, with a growth of 231,8% compared to the same period last year. Glass Cabins and Restaurants also experienced notable growth, with increases of 54,4% and 43,9%, respectively. Among the top 5 Micro-Brandtags by international search volume, Hotels has the highest growth, showing a 39,0% increase compared to Q4 2023.

Top 15 Micro-Brandtags for Finland **Internationally**

■ Q4 2024 ■ Q4 2023



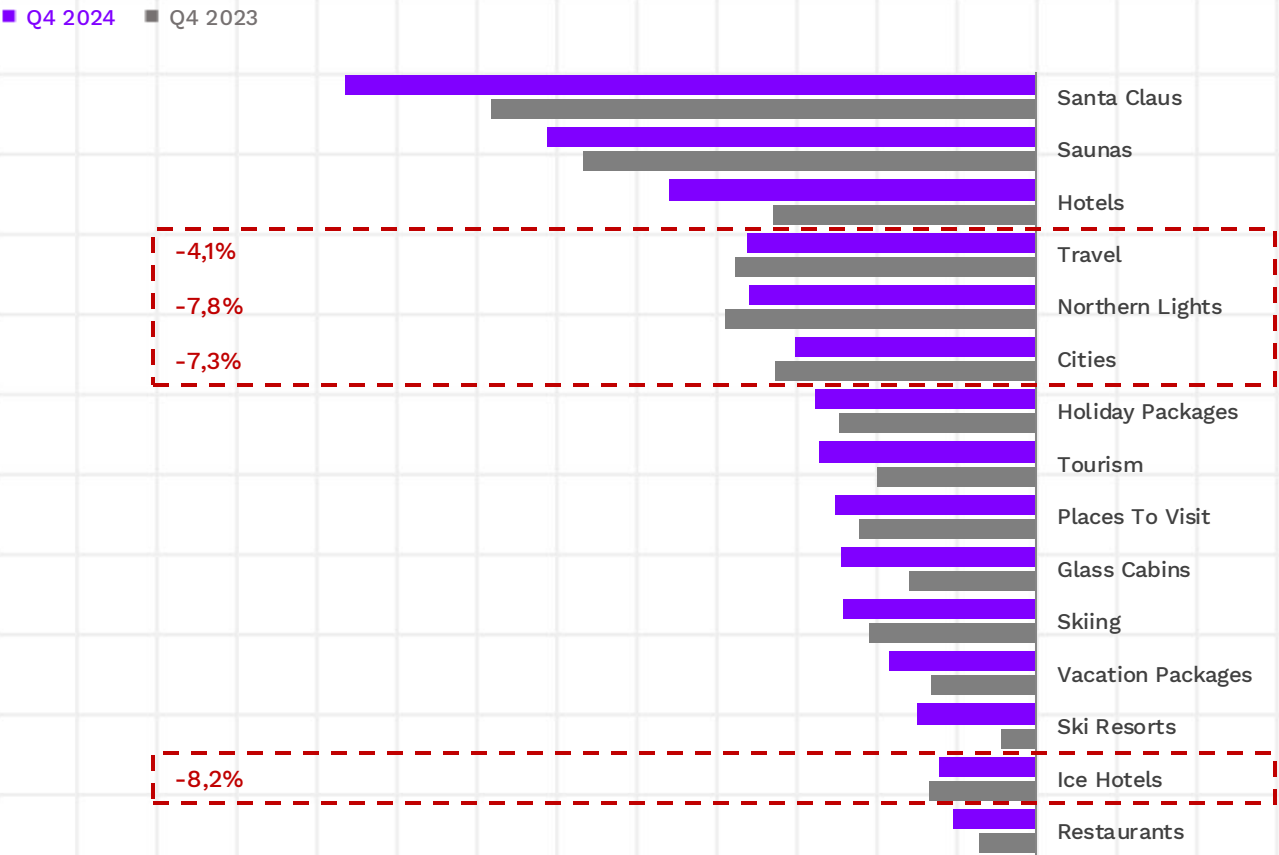
Conclusion 4

Winter accommodation show the highest growth, while Ice Hotels and Northern Lights packages experience a decline.

Ski Resorts have seen the most significant increase in international search volume, with a growth of 231,8% compared to the same period last year. Glass Cabins and Restaurants also experienced notable growth, with increases of 54,4% and 43,9%, respectively. Among the top 5 Micro-Brandtags by international search volume, Hotels has the highest growth, showing a 39,0% increase compared to Q4 2023.

The largest decline in international search volume is seen with Ice Hotels, which decreased by 8,2%. Among the top 5, Northern Lights (-7,8%) and Travel (-4,1%) experienced the biggest drops compared to the same period last year. Another significant decline in the growth rate is observed in Cities, which decreased by 7,3%.

Top 15 Micro-Brandtags for Finland Internationally



Conclusion 5

The top 3 markets remains unchanged, while the Netherlands enters the top 10 target markets for Finland.

The top 3 remains unchanged, with the United States recording 343K international searches, Japan at 293K, and Germany at 240K.

Italy and France swap positions, with France moving up to 5th place with 90K searches, while Italy drops to 6th with 84K.

Sweden exits the top 10 with 46K searches, while Norway climbs 3 positions compared to the same period last year, reaching 9th place with 58K searches.

One more shift is that China now holds the last position with 20K searches, dropping 2 spots compared to Q4 2023.

Target Market Distribution Q4 2024



















Rank	Flag	Target Market	Searches	Growth
1		United States	343K	+88,4%
2		Japan	293K	+11,4%
3		Germany	240K	-3,8%
4		United Kingdom	188K	+8,8%
5		France	90K	-15,3%
6		Italy	84K	-13,0%
7		India	77K	+47,7%
8		Spain	68K	-12,6%
9		Netherlands	58K	+1,0%
10		Canada	54K	+29,0%
11		Australia	48K	+27,4%
12		Sweden	46K	-8,6%
13		Switzerland	45K	-4,7%
14		Estonia	40K	-15,8%
15		Austria	37K	+1,3%
16		Belgium	24K	-9,3%
17		South Korea	21K	-3,5%
18		China	20K	-37,8%

Conclusion 6

The United States leads in both the highest number of international searches and the greatest growth, ...

The United States has experienced the largest increase in international searches, with a notable growth of 88,4%. Canada retains its 10th position, recording a 29,0% increase, while Australia rises by 27,4%, moving up two positions compared to the same period last year. India also saw a significant increase of 47.7%.

Target Market Distribution Q4 2024

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15		Austria	37K	+1,3%
16		Belgium	24K	-9,3%
17		South Korea	21K	-3,5%
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Conclusion 6

The United States leads in both the highest number of international searches and the greatest growth, while the majority of European and Asian markets decline.

The United States has experienced the largest increase in international searches, with a notable growth of 88,4%. Canada retains its 10th position, recording a 29,0% increase, while Australia rises by 27,4%, moving up two positions compared to the same period last year. India also saw a significant increase of 47.7%.

More than half of the target markets have experienced a decline in international search volumes compared to the same period last year. China saw the largest drop, with a decrease of 37,8%, followed by Estonia, which experienced a 15,8% decline and dropped 3 positions, reaching 14th place. France also saw a significant decrease of 15,3%, though it only lost one position in the ranking.

Target Market Distribution Q4 2024

Rank	Flag	Target Market	Searches	Growth
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Conclusion 7

Distant markets are experiencing consistent, organic growth in appeal, whereas Europe is facing a decline in non-organic search activity during Q4.

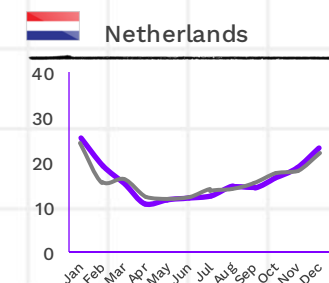
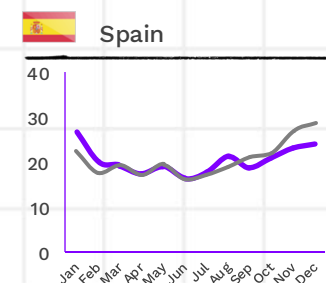
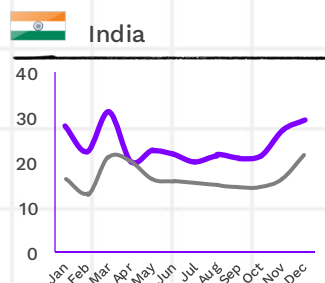
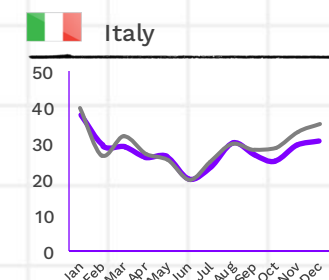
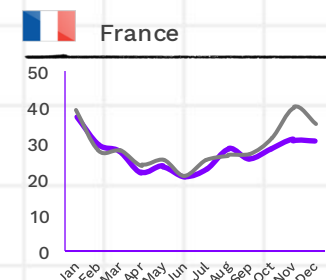
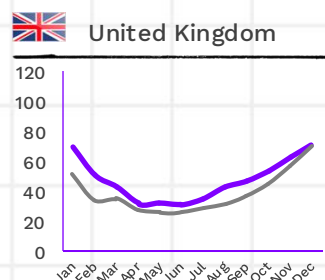
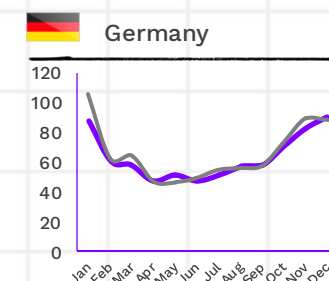
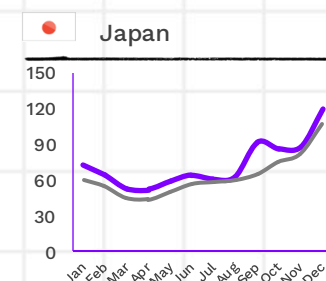
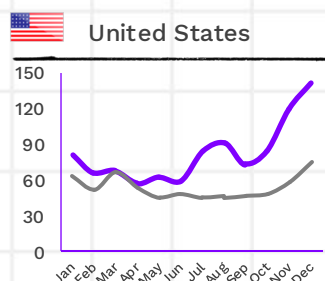
Across most distant markets, search volumes have shown consistent growth throughout the year, with South Korea and China being the only exceptions, experiencing more significant fluctuations.

At the regional level, search trends have remained relatively stable, with international search volumes either matching or falling below those of the previous year. The only regional target market that recorded notable growth was the UK, with an +8,8% increase.

In Q4, most countries saw a rise in search volume, continuing the upward trend. However, China stood out as the only market where search interest remained stable or even declined slightly.

Seasonality by Target Market – part 1/2

■ Jan - Dec 2024 ■ Jan - Dec 2023 | Searches In thousand



Conclusion 7

Distant markets are experiencing consistent, organic growth in appeal, whereas Europe is facing a decline in non-organic search activity during Q4.

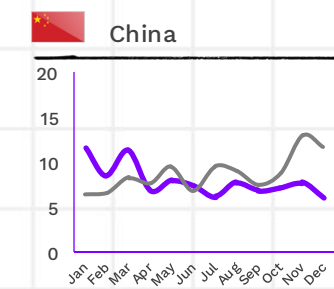
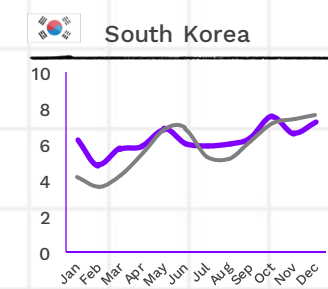
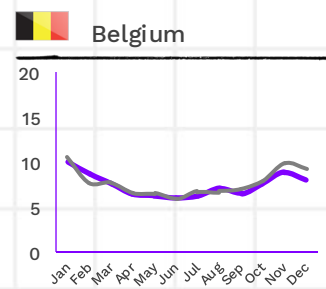
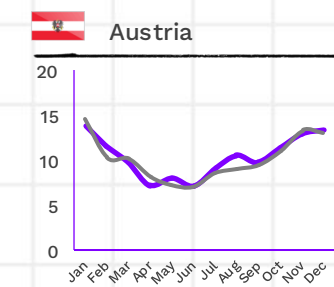
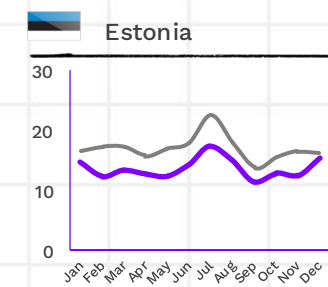
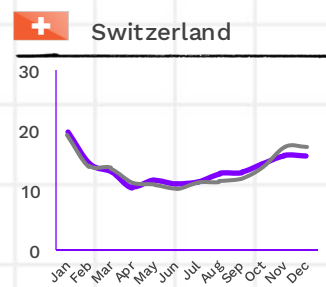
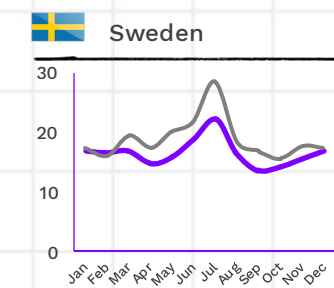
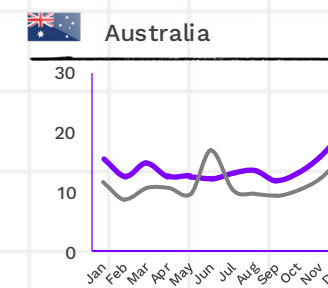
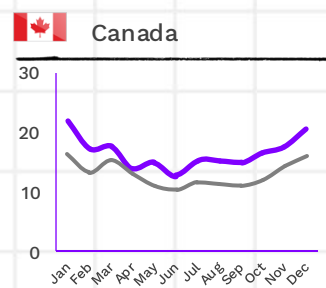
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In Q4, most countries saw a rise in search volume, continuing the upward trend. However, China stood out as the only market where search interest remained stable or even declined slightly.

Seasonality by Target Market – part 2/2

■ Jan - Dec 2024 ■ Jan - Dec 2023 | Searches In thousand



Conclusion 7 - insights

Distant markets are experiencing consistent, organic growth in appeal, whereas Europe is facing a decline in non-organic search activity during Q4.

Top Brandtags by Target Market – Q4 2024

United States

#	Brandtag	Searches	Growth
1	Santa Claus	72K	+326%
2	Wellbeing	45K	+39%
3	Special Acc.	31K	+119%
4	Tourism Package	30K	+617
5	Hotels	25K	+181
6	Natural Wnd.	15K	+23
7	Tourism Attr.	15K	+46
8	Tourism	11K	+58
9	Destinations	10K	+15
10	Winter Sports	10K	+58

Japan

#	Brandtag	Searches	Growth
1	Santa Claus	77K	+10%
2	Natural Wnd.	34K	+16%
3	Tourism	32K	+22%
4	Travel	27K	+30%
5	Wellbeing	26K	-10%
6	Gastro Activities	22K	+9%
7	Trad. Markets	13K	+6%
8	Tours	8K	+26%
9	Hotels	5K	+63%
10	Restaurants	5K	+23%

Germany

#	Brandtag	Searches	Growth
1	Tourism Package	29K	-10%
2	Santa Claus	27K	+76%
3	Wellbeing	25K	+11%
4	Natural Wnd.	24K	-24%
5	Winter Sports	16K	-3%
6	Special Acc.	13K	-31%
7	Tourism Attr.	13K	+3%
8	Travel	12K	-9%
9	Destinations	8K	-24%
10	Holiday Acc.	7K	-27%

Canada

#	Brandtag	Searches	Growth
1	Wellbeing	15K	+101%
2	Hotels	4K	-1%
3	Santa Claus	3K	+43%
4	Destinations	2K	+0%
5	Natural Wnd.	2K	-15%
6	Special Acc.	2K	+34%
7	Tourism Attr.	2K	+28%
8	Tourism	2K	+55%
9	Winter Sports	2K	+35%
10	Holiday Acc.	1K	-19%

Australia

#	Brandtag	Searches	Growth
1	Santa Claus	10K	+19%
2	Wellbeing	5K	+40%
3	Special Acc.	3K	+50%
4	Tourism Attr.	2K	+28%
5	Hotels	2K	+91%
6	Natural Wnd.	2K	-19%
7	Winter Sports	2K	+46%
8	Tourism Pacage	2K	+82%
9	Travel	1K	-2%
10	Tourism	1K	+54%

Sweden

#	Brandtag	Searches	Growth
1	Destinations	4K	+10%
2	Santa Claus	3K	+20%
3	Wellbeing	3K	-17%
4	Winter Sport.	2K	+6%
5	Natural Wnd.	2K	-32%
6	Boating	2K	-43%
7	Cruises	2K	-5%
8	Special Acc.	2K	+46%
9	Tourism Attr.	2K	+13%
10	Hotels	1K	+41%

United Kingdom

#	Brandtag	Searches	Growth
1	Tourism Package	28K	-12%
2	Santa Claus	18K	-23%
3	Winter Sports	18K	+11%
4	Special Acc.	18K	+55%
5	Hotels	14K	+112%
6	Ski Acc.	11K	+620%
7	Wellbeing	10K	+16%
8	Natural Wnd.	7K	-23%
9	Tourism Attr.	7K	+1%
10	Destinations	6K	-3%

France

#	Brandtag	Searches	Growth
1	Travel	12K	-30%
2	Natural Wnd.	10K	-35%
3	Wellbeing	7K	-8%
4	Destinations	7K	-7%
5	Tourism Attr.	5K	-15%
6	Hotels	4K	+8%
7	Winter Sports	4K	+2%
8	Tourism	4K	-12%
9	Tourism Package	2K	-7%
10	Special Acc.	2K	-25%

Italy

#	Brandtag	Searches	Growth
1	Wellbeing	23K	-9%
2	Natural Wnd.	14K	-14%
3	Tourism Attr.	8K	-8%
4	Travel	5K	-12%
5	Santa Claus	3K	-63%
6	Special Acc.	3K	+14%
7	Destinations	3K	+6%
8	Hotels	2K	+47%
9	Tourism	1K	-10%
10	Tourism Package	1K	-14%

Switzerland

#	Brandtag	Searches	Growth
1	Natural Wnd.	5K	-27%
2	Wellbeing	3K	+5%
3	Winter Sports	3K	-5%
4	Tourism Package	2K	-12%
5	Travel	2K	-24%
6	Special Acc.	2K	+7%
7	Tourism Attr.	2K	-8%
8	Hotels	2K	+47%
9	Santa Claus	2K	+8%
10	Destinations	1K	-27%

Estonia

#	Brandtag	Searches	Growth
1	Destinations	10K	-32%
2	Ski Acc.	5K	+76%
3	Natural Wnd.	3K	-29%
4	Winter Sporta	3K	+6%
5	Tourism Attr.	1K	-9%
6	Wellbeing	1K	-16%
7	Museums	1K	+19%
8	Entert. Parks	0.7K	-39%
9	Parks & Reserves	0.6K	+152%
10	Tourism Package	0.6K	+2%

Austria

#	Brandtag	Searches	Growth
1	Natural Wnd.	4K	-20%
2	Wellbeing	4K	+6%
3	Santa Claus	3K	+70%
4	Tourism Pac.	3K	-2%
5	Winter Sport.	2K	-2%
6	Tourism Attr.	2K	-5%
7	Travel	2K	-3%
8	Special Acc.	1K	-20%
9	Destinations	1K	+13%
10	Camping	0.8K	-2%

India

#	Brandtag	Searches	Growth
1	Tourism Package	12K	+104%
2	Tourism	8K	+127%
3	Destinations	7K	+20%
4	Hotels	7K	+84%
5	Santa Claus	5K	+71%
6	Tourism Attr.	5K	+22%
7	Special Acc.	5K	+144%
8	Natural Wnd.	3K	+20%
9	Wellbeing	2K	-7%
10	Travel	2K	-10%

Spain

#	Brandtag	Searches	Growth
1	Natural Wnd.	8K	-25%
2	Tourism Attr.	7K	+0%
3	Travel	6K	-24%
4	Santa Claus	6K	-25%
5	Destinations	5K	-4%
6	Special Acc.	2K	-26%
7	Wellbeing	2K	+11%
8	Nightlife	2K	+24%
9	Hotels	1K	-8%
10	Winter Sports	1K	+7%

Netherlands

#	Brandtag	Searches	Growth
1	Tourism Package	10K	-2%
2	Santa Claus	5K	-23%
3	Restaurants	5K	+601%
4	Natural Wnd.	4K	-18%
5	Travel	3K	-19%
6	Winter Sports	3K	-3%
7	Wellbeing	3K	-4%
8	Special Acc.	1K	+11%
9	Ski Acc.	1K	+55%
10	Camping	1K	-13%

Belgium

#	Brandtag	Searches	Growth
1	Natural Wnd.	2K	-23%
2	Travel	1K	-26%
3	Wellbeing	1K	-3%
4	Winter Sports	1K	-22%
5	Destinations	1K	-12%
6	Tourism Attr.	1K	+12%
7	Tourism Package	1K	-14%
8	Santa Claus	1K	-40%
9	Tourism	0.9K	+9%
10	Hotels	0.7K	+6%

South Korea

#	Brandtag	Searches	Growth
1	Wellbeing	4K	-14%
2	Natural Wnd.	4K	-9%
3	Travel	2K	-11%
4	Tourism Attr.	2K	+6%
5	Special Acc.	1K	+41%
6	Hotels	0.9K	+9%
7	Santa Claus	0.8K	+17%
8	Special Events	0.5K	-32%
9	Happiness	0.4K	+2%
10	Animal Watching	0.4K	+58%

China

#	Brandtag	Searches	Growth
1	Tourism	10K	-53%
2	Travel	6K	+19%
3	Winter Sport.	0.8K	-52%
4	Natural Wnd.	0.2K	-23%
5	Shopping	0.2K	-44%
6	Tourism Attr.	0.2K	+5%
7	Hotels	0.2K	-9%
8	Santa Claus	0.2K	-13%
9	Wellbeing	0.2K	-13%
10	Tourism Pac.	0.1K	+13%

Conclusion 8

Domestic search volumes for Q4 continue below the previous year's benchmark.

Regarding domestic searches, Finland experienced fluctuations over the three months of Q4, with an overall decline of 1,2% in that quarter.

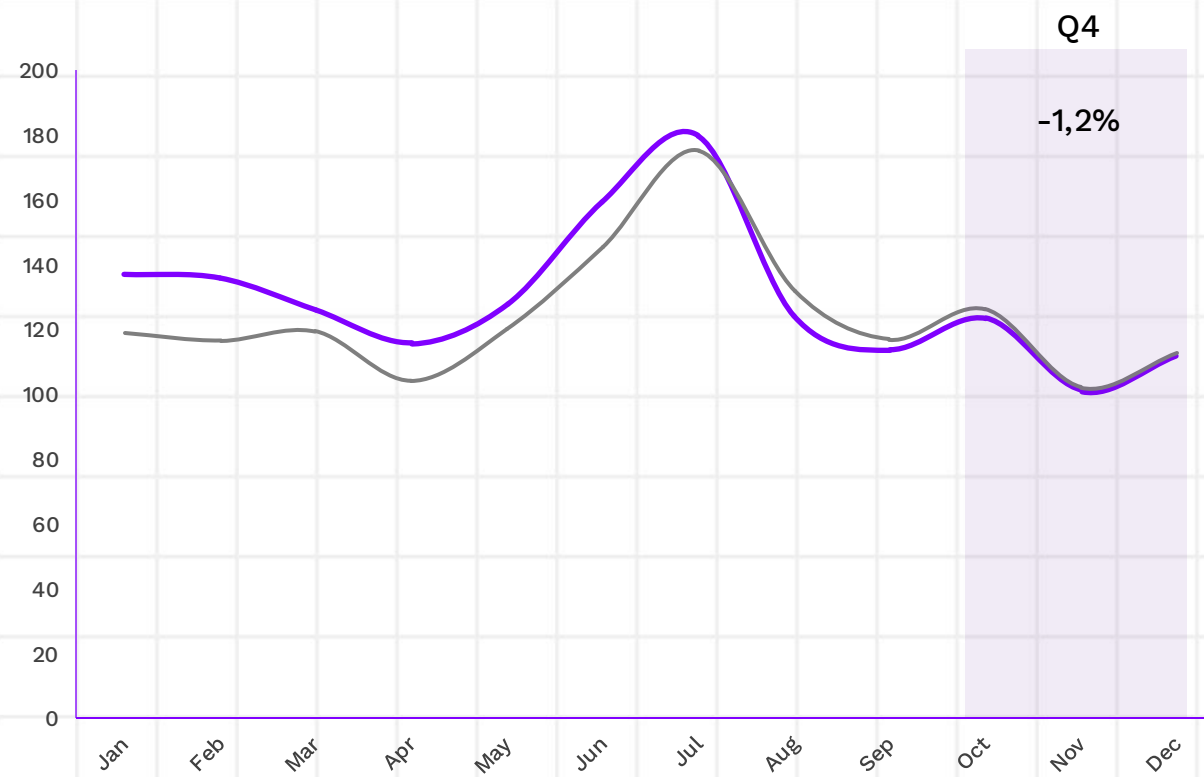
After a period of declining searches, October saw figures approaching those of Q4 2023, although they were still 1,98% lower than in the same month last year (123K compared to 126K).

While search volumes followed the trend seen in Q4 2023, they continued to remain below 2023 levels, with only 101K recorded in November 2024.

In December, the number of searches rose to 112K, though it still remained below the value from the same period the previous year.

Seasonality of searches for Finland Domestic

■ Jan - Dec 2024 ■ Jan - Dec 2023
Searches In thousand



Conclusions Q4 2024

1. Finland continues to grow steadily, nevertheless slower than Iceland and Denmark.
2. International search volume for Finland showed a consistent upward trend throughout Q4.
3. Winter-related searches remain among the most popular themes for Finland.
4. Winter accommodation show the highest growth, while Ice Hotels and Northern Lights packages experience a decline.
5. The top 3 markets remains unchanged, while the Netherlands enters the top 10 target markets for Finland.
6. The United States leads in both the highest number of international searches and the greatest growth, while the majority of European and Asian markets decline
7. Distant markets are experiencing consistent, organic growth in appeal, whereas Europe is facing a decline in non-organic search activity during Q4.
8. Domestic search volumes for Q4 continue below the previous year's benchmark.

Thank you!

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