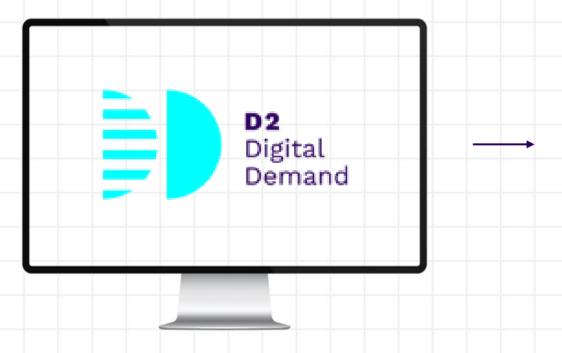


# The "search" is a KPI for countries, regions, and cities



D2-Digital Demand is an intelligence tool designed to measure the tourism appeal of countries



- **200K** tourism-related keyword combinations per country
- 20 languages
- **290+** tourism-related brandtgags
- Data retrieve on a monthly basis
- 200 origins in the world

ar

# Finland





# 8,5M

International searches Jan '24 – Dec '24

1

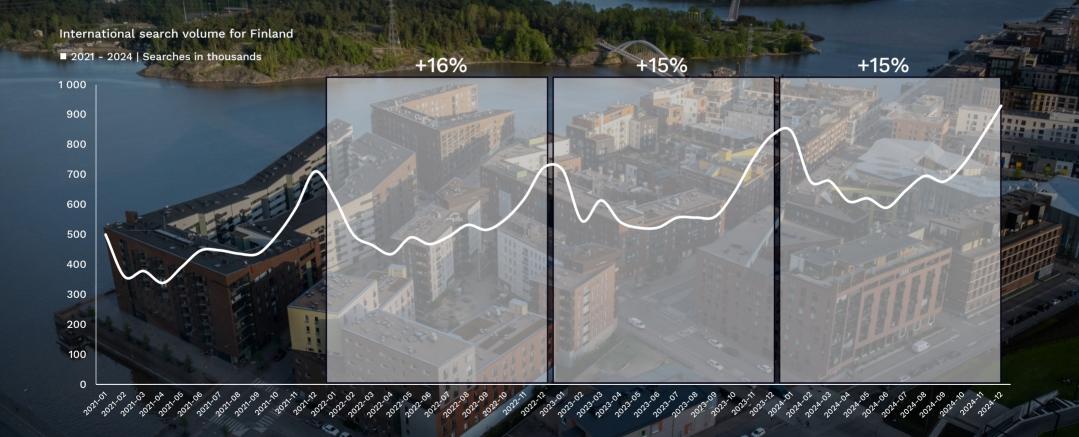
International search volume for Finland 2021 - 2024 | Searches in thousands



1

International search volume for Finland = 2021 - 2024 | Searches in thousands





# What? When? Who?

Bloom Consulting COUNTRIES, REGIONS & CITIES

# Saunas

Top Brandtags Tourism Finland (Searches Jan'24 – Dec'24)



Bloom Consulting COUNTRIES, REGIONS & CITIES

# Santa Claus

Top Brandtags Tourism Finland (Searches Jan'24 – Dec'24)



# Northern Lights

Top Brandtags Tourism Finland (Searches Jan'24 – Dec'24)

and the second sec	
	Saunas
	Hotels
	Santa Claus
	Northern Light
	Cities
	Tourism

# As well as Cities, Skiing and Glass Cabins

#### Cities



#5	
429K searches	-11% growth

# Skiing



#### #10 233K searches

+22% growth

#### 205K searches

+56% growth

#### **Glass cabins**



# Hotels, Tourism, Places to Visit and Vacation Packages make the Top list of Brandtags for Finland

Top MicroBrandtags (Searches in thousands) ■2024 ■2023

						Saunas
						Hotels
						Santa C
						Norther
						Cities
						Tourism
					_	Travel
				_		Places T
				_		
				_		Holiday
						Skiing
				 -		Glass Ca
				_		Vacatior

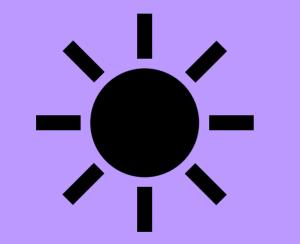
Saunas	
Hotels	
Santa Claus	
Northern Lights	
Cities	
Tourism	
Travel	
Places To Visit	
Holiday Packages	
Skiing	
Glass Cabins	
Vacation Packages	

# Both transactional brandtags (*Hotels*) and discovery Brandtags (*Tourism*, *Glass Cabins*) experience higher growth than Cultural ones

Top MicroBrandtags (Searches in thousands) ■2024 ■2023



Bloom Consulting COUNTRIES, REGIONS & CITIES



VS



# Finland tourism seasonality

### International search volume for Finland

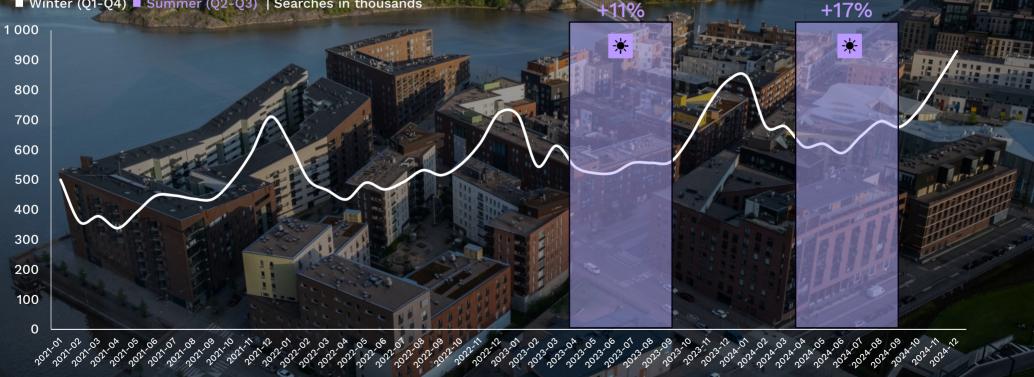
■ Winter (Q1-Q4) ■ Summer (Q2-Q3) | Searches in thousands



# Finland – Summer trend

#### International search volume for Finland

■ Winter (Q1-Q4) ■ Summer (Q2-Q3) | Searches in thousands

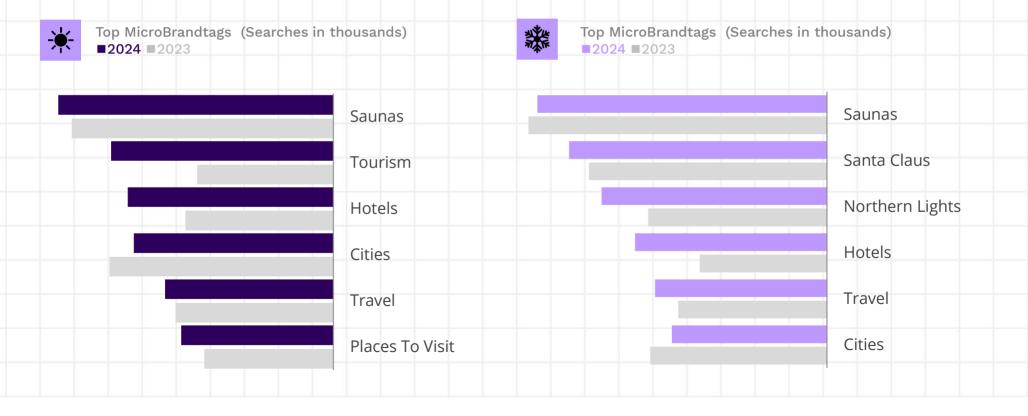


# Finland – Summer and Winter trend

#### International search volume for Finland



# Saunas, Cities and Travel have high touristic demand all year round, while Winter stands out for Santa Claus and Northern Lights



## A deep dive into specific summer and winter activities









#17 118K searches -17%



#20 93K searches +24%



#21 87K searches -9%

#### Midnight sun



#28 63K searches +16%



#29 62K searches +10% Fishing



#32 52K searches +5%



#### Ski resorts



#13 135K searches +242%



Ice Hotels

#15 126K searches +14%

#### Reindeers



#26 74K searches +15%

#### **Christmas Markets**



#40 42K searches +15%

## The majority of Brandtags grow both in winter and summer



Top MicroBrandtags (Searches in thousands) 2024





#17 118K searches -17%



#20 93K searches +24%



87K searches -9%

#### Midnight sun



#28 63K searches +16%



#29 62K searches +10%

#### Fishing



#32 52K searches +5%



Ice Hotels

#### Ski resorts



#13 135K searches +242%



#15 126K searches +14%

#### Reindeers



#26 74K searches +15%

#### **Christmas Markets**



#40 42K searches +15%

## With the exception of *Lakes* and *Camping*



#### Top MicroBrandtags (Searches in thousands) 2024

Museums





#17 118K searches -17%













Camping



Ski resorts





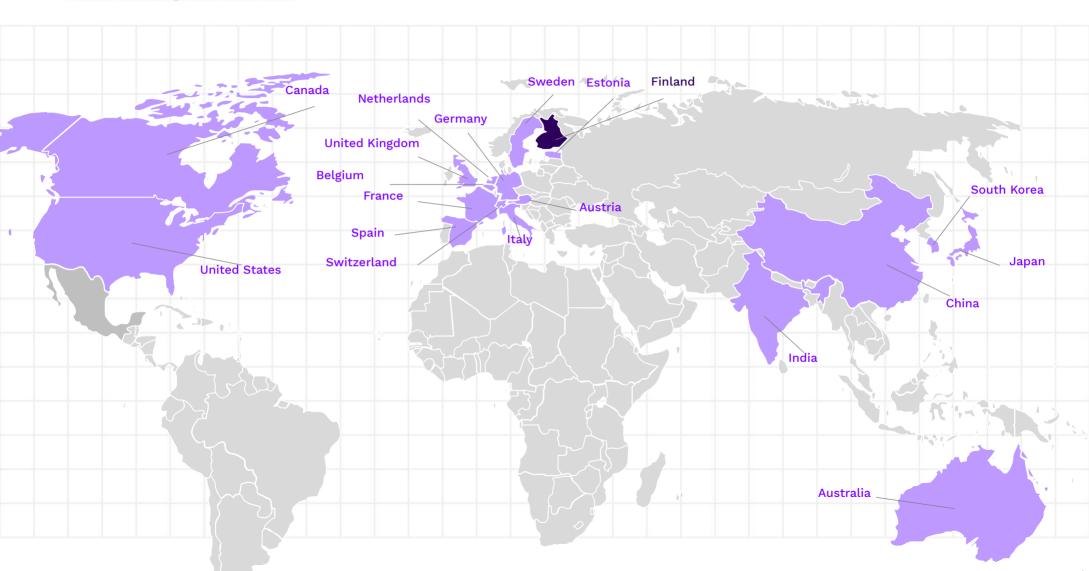




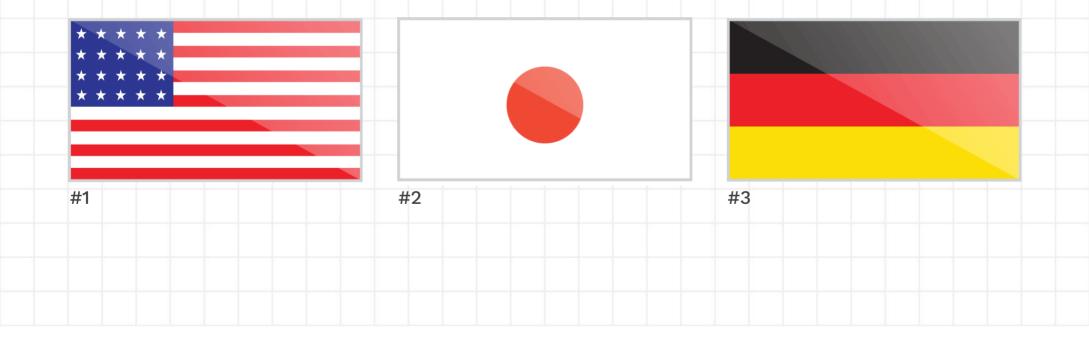
Ice Hotels



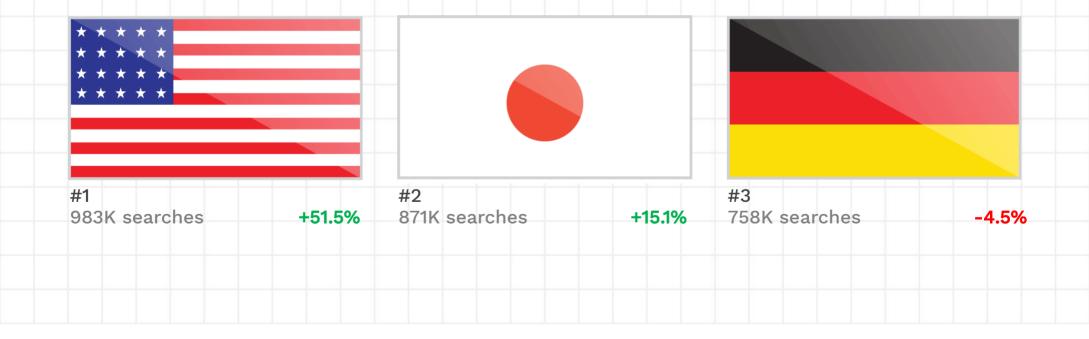
#### Bloom Consulting COUNTRIES, REGIONS & CITIES



# Top 3 markets for Finland



The United States leads with remarkable growth, followed by Japan and Germany. Notably, the German market is experiencing a negative trend for the first time



# Target markets digital demand rank and growth for Finland

#### Search volume for Target Markets

Searches: Jan 2024 – Dec 2024 and Growth 2024 vs 2023

Rank	G Flag	Target Market	Searches	Growth	Rank	Flag	Target Market	Searches	Growth
1		United States	983.1K	+51.5%	10	*	Canada	197.9K	+27.6%
2		Japan	871.4K	+15.1%	11		Netherlands	193.8K	+0.4%
3		Germany	758.4K	-4.5%	12	*	Australia	167.4K	+23.2%
4		United Kingdom	572.4K	+21.2%	13		Estonia	164.1K	-19.6%
5		Italy	334.2K	-4.8%	14	+	Switzerland	163.6K	+0.8%
6		France	329.2K	-6.3%	15		Austria	124.8K	+2.5%
7	6	India	285.9K	+43.1%	16	*3	China	95.1K	-8.9%
8	- <b>8</b> 8	Spain	244.3K	-1.4%	17		Belgium	89.2K	-3.4%
9		Sweden	198.1K	-12.2%	18		South Korea	75.0K	+7.0%

# Distant markets are showing significant growth in international search volume, with the UK being the only European country among them

Search volume for Target Markets

Searches: Jan 2024 – Dec 2024 and Growth 2024 vs 2023

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8	- 10 C	Spain	244.3K	-1.4%	17		Belgium	89.2K	-3.4%
9		Sweden	198.1K	-12.2%	18		South Korea	75.0K	+7.0%

# Regional markets are either stagnating or declining, with the British market being the only exception

#### Search volume for Target Markets

Searches: Jan 2024 – Dec 2024 and Growth 2024 vs 2023

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7		India	285.9K	+43.1%	16	*3	China	95.1K	-8.9%
8	- <b>1</b>	Spain	244.3K	-1.4%	17		Belgium	89.2K	-3.4%
9		Sweden	198.1K	-12.2%	18		South Korea	75.0K	+7.0%

# This is the first time we are seeing a widespread decline in searches for Finland from EU markets.

# German tourists

## Search behavior remains stable throughout the year

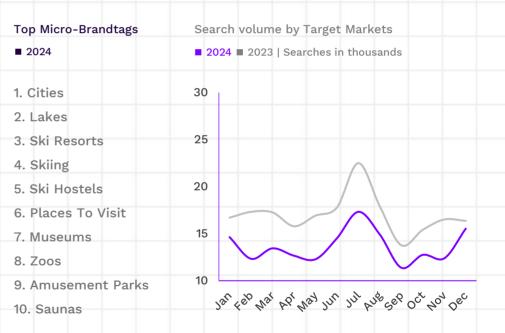




# Swedish tourists Significant decline

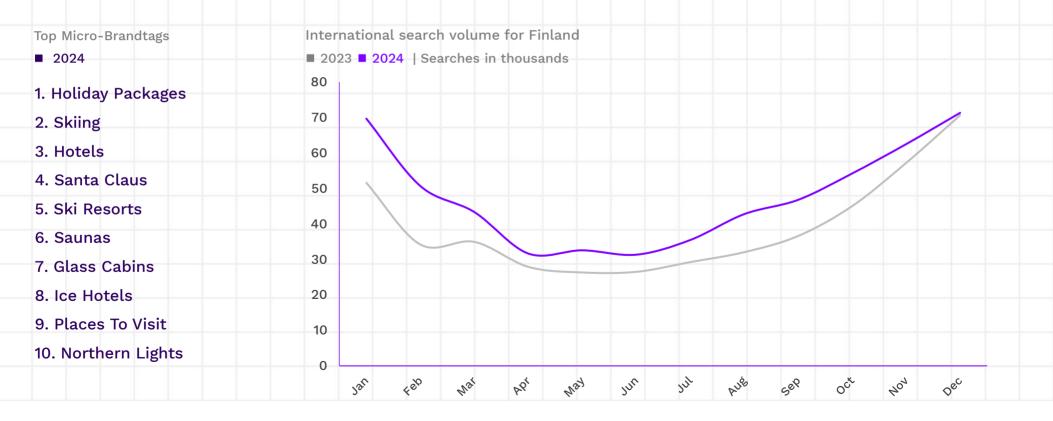
#### **Top Micro-Brandtags** Search volume by Target Markets ■ 2024 ■ 2023 | Searches in thousands ■ 2024 30 1. Ferry 2. Cruises 25 3. Cities 4. Saunas 20 5. Hotels 6. Santa Claus 15 7. Ski Resorts 8. Places To Visit 10 9. Skiing Jartes Way by Way In In Profes Oct Nor Dec 10. Camping

# Estonian tourists Significant decline





# British tourists Substantial growth in demand



# Distant markets show strong interest in winter-related searches, especially for *Santa Claus, Skiing, and the Northern Lights*.

Top 10 Micro-Brandtags for the fastest growing markets

Searches: Jan 2024 – Dec 2024

US tourists
Saunas
Santa Claus
Hotels
Cities
Glass Cabins
Places To Visit
Restaurants
Northern Lights
Vacation Packages

Ice Hotels

Indian touristsHoliday PackagesCitiesHotelsVisitPlaces To VisitTourismNorthern LightsSaunasGlass CabinsSanta Claus

	*
1	Canadian tourists
0	Spa and Beauty*
\$	Saunas
ŀ	Hotels
(	Cities
ę	Santa Claus
1	Fravel
F	Places To Visit
1	Fourism
0	Skiing
1	Glass Cabins

*
Australian tourists
Santa Claus
Saunas
Hotels
Glass Cabins
Places To Visit
Ice Hotels
Travel
Skiing
Holiday Packages
Tours

Japanese tourists
Santa Claus
Tourism
Saunas
Travel
Northern Lights
Food Tourism
Tours
Hotels
Christmas Markets
Cafes

# Strong growth in transactional brand tags

#### Top 10 Micro-Brandtags for the fastest growing markets

Searches: Jan 2024 – Dec 2024

US tourists
Saunas
Santa Claus
Hotels
Cities
Glass Cabins
Places To Visit
Restaurants
Northern Lights
Vacation Packages
Ice Hotels

6			
India	n touris	ts	
Holida	y Packa	ages	
Cities			
Hotels	5		
Visit			
Places	s To Vis	it	
Touris	m		
North	ern Ligł	nts	
Sauna	S		
Glass	Cabins		
Santa	Claus		

*	
Canadian touris	ts
Spa and Beauty*	
Saunas	
Hotels	
Cities	
Santa Claus	
Travel	
Places To Visit	
Tourism	
Skiing	
Glass Cabins	

*	
Austra	alian tourists
Santa	Claus
Sauna	s
Hotels	
Glass	Cabins
Places	To Visit
Ice Ho	tels
Travel	
Skiing	
Holida	y Packages
Tours	

# Japanese tourists Santa Claus Tourism Saunas Travel Northern Lights Food Tourism Tours Hotels Christmas Markets Cafes

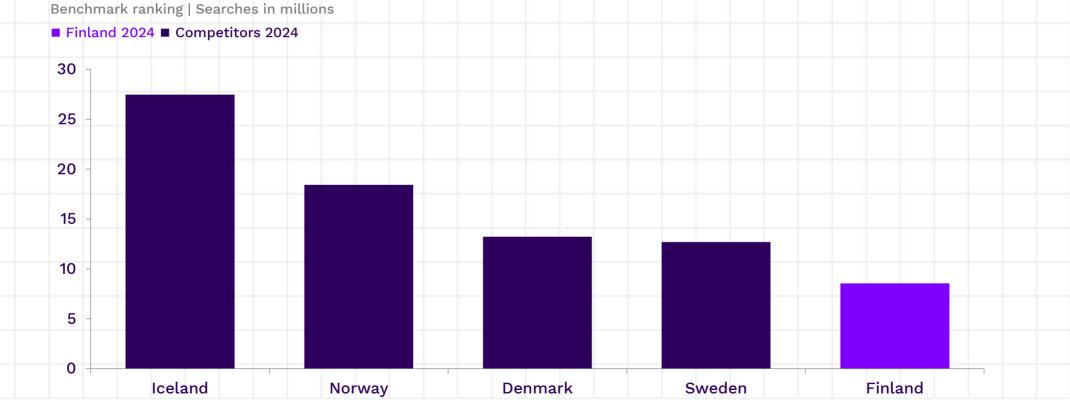
# Finnish tourists Stable demand



### Benchmark



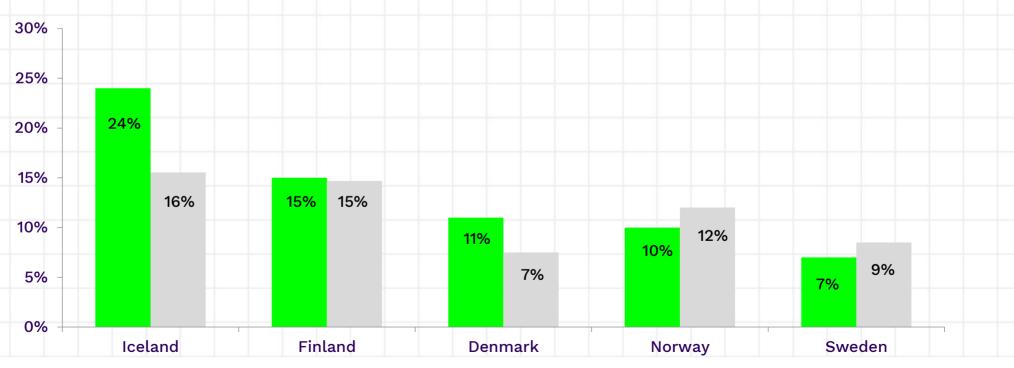
## Finland still trails other Nordic destinations in touristic demand,



## Finland still trails other Nordic destinations in touristic demand, sustained year-over-year growth has helped narrow the gap with its competitors.

Benchmark ranking

■ 2024 vs 2023 growth % ■ 2023 vs 2022 growth %



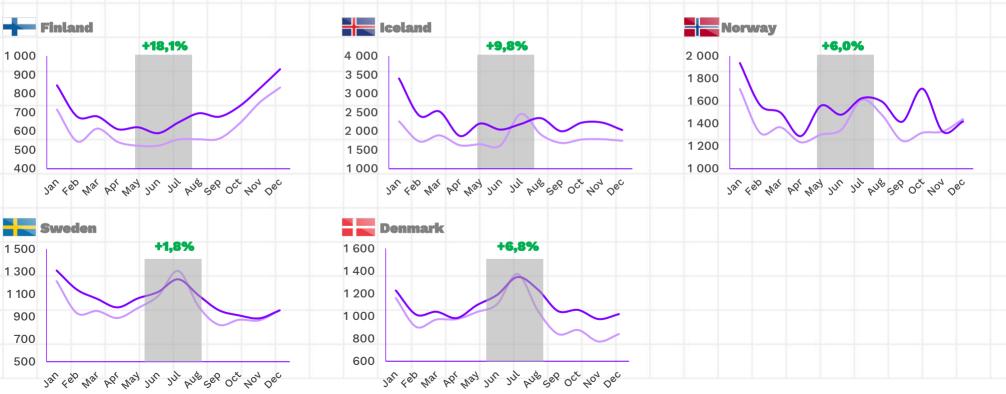
### Seasonality of searches for all Nordic countries

Seasonality of searches **2024 2023** Iceland Finland Norway 1 0 0 0 4 0 0 0 2 0 0 0 3 500 900 1 800 800 3 000 1 600 700 2 500 1 400 2 0 0 0 600 1 2 0 0 500 1 500 400 1 0 0 0 1 0 0 0 Jar tes war by way in in the profession Jar ter war by way in in the reb cer of has dec Jar ter war by way in in the rige car of way be Denmark Sweden 1 500 1 600 1 300 1 400 1 100 1 200 900 1 0 0 0 700 800 500 600 Jar tep way by way in in the teb Ceb Oct Non Dec Jar feb war ppr way jur jur pue ger Oct Non Dec

## Remarkable growth rate for Finland in Summer compared to the Nordic benchmark

Seasonality of searches

**2024 2023** 



## Will the trend of growth in distant markets and stagnation in EU markets continue for other Nordic countries?

## Top Markets and Search Growth for Finland

#### Ranking on Search Volume for Target Markets

÷	Fin	land	
#		Country	Growth
_		USA	+51%
2	•	Japan	+15%
3	_	Germany	-5%
4	_	UK	+21%
5	_	Italy	-5%
6	_	France	-6% +43%
7	-	India	+43%
8	_	Spain	-1%
	_	Sweden	-12%
10	*	Canada	+28%

## Top Markets and Search Growth for Finland, and other Nordic competitors

Ranking on Search Volume for Target Markets

	Fini	and		H	Nor	way			Den	mark			Sw	eden	
#		Country	Growth	#		Country	Growth	#		Country	Growth	#		Country	Growt
1		USA	+51%	1		USA	+30%	1		Germany	-13%	1		Germany	-13%
2	•	Japan	+15%	2		Germany	-11%	2		USA	+70%	2		USA	+35%
3		Germany	-5%	3		UK	+8%	3		UK	+16%	3		Denmark	-15%
4	×	UK	+21%	4		India	+4%	4		Netherlands	-18%	4		UK	+25%
5		Italy	-5%	5		Italy	+1%	5	×	Australia	+10%	5		Netherlands	-9%
6		France	-6%	6		Netherlands	-20%	6		India	-4%	6		Norway	-4%
7		India	+43%	7		France	-3%	7		Sweden	-10%	7		France	-2%
8	-165	Spain	-1%	8	*	Spain	+5%	8		France	+5%	8	-	Finland	+2%
9		Sweden	-12%	9		Sweden	-5%	9		Italy	+3%	9	6	India	+19%
10	*	Canada	+28%	10	*	Canada	+8%	10	-	Spain	+12%	10	+	Switzerland	-3%

## The US market is growing faster than its competitors, ranking just behind Denmark

Ranking on Search Volume for Target Markets

	= Finl	and			Nor	way			Den	mark			Sw	eden	
#		Country	Growth	#		Country	Growth	#		Country	Growth	#		Country	Growth
1		USA	+51%	1		USA	+30%	1		Germany	-13%	1		Germany	-13%
2		Japan	+15%	2		Germany	-11%	2		USA	+70%	2		USA	+35%
3		Germany	- 5%	3		UK	+8%	3		UK	+16%	3		Denmark	-15%
4		UK	+21%	4		India	+4%	4.		Netherlands	-18%	4		UK	+25%
5		Italy	- 5%	5		Italy	+1%	5		Australia	+10%	5		Netherlands	-9%
		France	-6%	6		Netherlands	-20%	6		India	-4%	6		Norway	-4%
7		India	+43%	7		France	-3%	7		Sweden	-10%	7		France	-2%
8	-	Spain	-1%	8	-0	Spain	+5%	8		France	+5%	8	+	Finland	+2%
9	-	Sweden	-12%		-	Sweden	-5%			Italy	+3%			India	+19%
10	•	Canada	+28%	10		Canada	+8%	10	-40	Spain	+12%	10		Switzerland	-3%

## Finland shows the smallest decline in the German market

Ranking on Search Volume for Target Markets

+	Finland			Norway				Denmark					Sweden				
#	Country	Growth	#	c	country	Growth	#		Country	Growth	#		Country	Growth			
1	USA	+51%	1		USA	+30%	1		Germany	-13%	1		Germany	-13%			
2	• Japan	+15%	2		Germany	-11%	2		USA	+70%	2		USA	+35%			
3	Germany	-5%	3		UK	+8%	3		UK	+16%	3		Denmark	-15%			
4	UK	+21%	4		India	+4%	4		Netherlands	-18%	4		UK	+25%			
5	Italy	-5%	5		Italy	+1%	5		Australia	+10%	5		Netherlands	-9%			
6	France	-6%	6		Netherlands	-20%	6		India	-4%	6		Norway	-4%			
7	📃 India	+43%	7		France	-3%	7		Sweden	-10%	7		France	-2%			
8	🤹 Spain	-1%	8	-	Spain	+5%	8		France	+5%	8	+	Finland	+2%			
9——	-Sweden	-12%			Sweden				Italy	+3%			India	+19%			
10	Canada	+28%	10	•	Canada	+8%	10	40	Spain	+12%	10	4	Switzerland	-3%			

## Finland, along with Sweden, is the fastest-growing market for the British market

Ranking on Search Volume for Target Markets

	<b>Fini</b>	and			Nor	way			Der	mark			Sw	eden	
#		Country	Growth	#		Country	Growth	#		Country	Growth	#		Country	Growth
1		USA	+51%	1		USA	+30%	1		Germany	-13%	1		Germany	-13%
2	•	Japan	+15%	2		Germany	-11%	2		USA	+70%	2		USA	+35%
3		Germany	-5%	3		ик	+8%	3		ик	+16%	3		Denmark	-15%
4		ик	+21%	4		India	+4%	4		Netherlands	-18%	4		UK	+25%
5		Italy	-5%	5		Italy	+1%	5		Australia	+10%	5		Netherlands	-9%
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7		India	+43%	7		France	-3%	7		Sweden	-10%	7		France	-2%
8	-	Spain	-1%	8	-	Spain	+5%	8		France	+5%	8	+	Finland	+2%
9——	-	Sweden	-12%		-	Sweden				Italy	+3%			India	+19%
10	141	Canada	+28%	10		Canada	+8%	10	-40-	Spain	+12%	10	+	Switzerland	-3%

## Finland is the fastest-growing destination in the Indian market

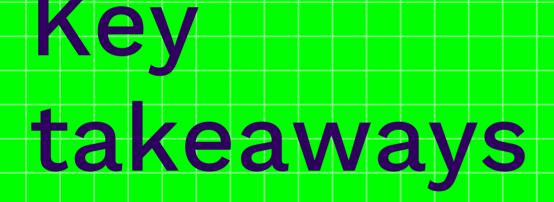
#### Ranking on Search Volume for Target Markets

	Finland			Norway			Denr	mark			Swe	den	
#	Country	Growth	#	Country	Growth	#	C	ountry	Growth	#	c	ountry	Growth
1	USA	+51%	1	USA	+30%	1		Germany	-13%	1		Germany	-13%
2	• Japan	+15%	2	Germany	-11%	2		USA	+70%	2		USA	+35%
3	Germany	-5%	3	UK	+8%	3		UK	+16%	3		Denmark	-15%
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5	l ltaly	-5%	5	Italy	+1%	5		Australia	+10%	5		Netherlands	-9%
6	France	-6%	6	Netherlands	-20%	6		India	-4%	6		Norway	-4%
7	🔍 India	+43%	7	France	-3%	7		Sweden	-10%	7		France	-2%
8	Spain	-1%	8	s Spain	+5%	8		France	+5%	8	+	Finland	+2%
9	-Sweden	-12%	9	Sweden			-	Italy	+3%	9	0	India	+19%
10	🔶 Canada	+28%	10	Canada	+8%	10	-	Spain	+12%	10	+	Switzerland	-3%

## Finland shows a similar growth pattern to the benchmark for EU markets

Ranking on Search Volume for Target Markets

	Finland Norway							Denmark					Sweden				
#		Country	Growth	#		Country	Growth	#		Country	Growth	#		Country	Growth		
		USA	+51%	1		USA	+30%	1		Germany	-13%	1		Germany	-13%		
2		Japan	+15%	2		Germany	-11%	2		USA	+70%	2		USA	+35%		
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7	0	India	+43%	7		France	-3%	7		Sweden	-10%	7		France	-2%		
3	-461	Spain	-1%	8	*	Spain	+5%	8		France	+5%	8	+	Finland	+2%		
9		Sweden	-12%		-	Sweden		9		Italy	+3%		-	India	+19%		
10		Canada	+28%	10	•	Canada	+8%	10	-	Spain	+12%	10		Switzerland	-3%		



## Finland's touristic appeal is growing

Although Finland still trails other Nordic destinations in touristic demand, sustained year-over-year growth has helped narrow the gap with its closest competitors.

## Touristic demand from distant markets is outpacing European demand

Strong growth demand, North America and Asian markets contrasts with a slight decline in intra-European arrivals. The British market is the exception, as it is the only European markets that is growing . This pattern echoes broader Nordic trends, but Finland is now outperforming its benchmark peers.

## Core cultural brandtags remain strong, transactional brandtags rising

"Sauna," "Santa," "Northern Lights," "City" and "Glass Cabins" continue to top Finland's brandtags, while transaction-oriented tags (e.g. "hotels," "touristic packages") have seen particular growth—especially among visitors from the the UK and distant markets.

# Summer strategy delivers higher growth than competitors

Despite big loss in demand from neighbors (Sweden, Estonia) and a plateau in Germany, Finland's summer offering push has driven faster seasonal growth than its direct Nordic competitors.



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### Key takeaways

#### Finland's touristic appeal is growing

Although Finland still trails other Nordic destinations in touristic demand, sustained year-over-year growth has helped narrow the gap with its closest competitors.

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