

**Bloom Consulting** COUNTRIES, REGIONS & CITIES

# Visit Finland Digital Demand – D2©

Executive Summary – Data refresh Q4 2024

Version 1.0

February 12<sup>th</sup>, 2025



## 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%.

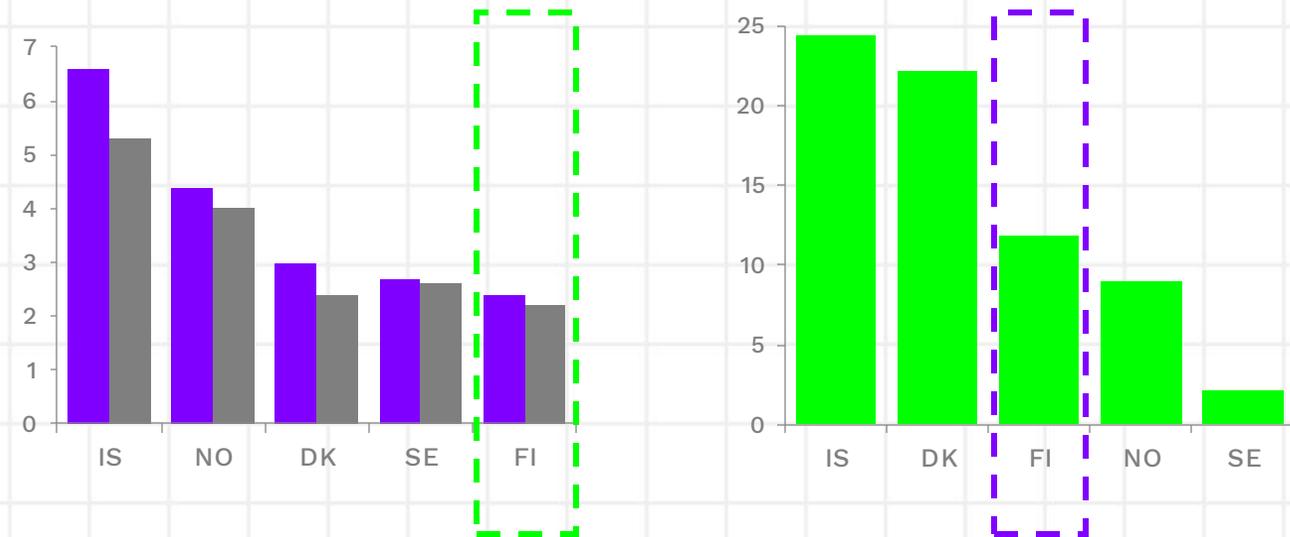
Denmark, despite registering the second highest growth rate of +22,2% compared to the same period last year, ranks third in international searches with 3,0 million.

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

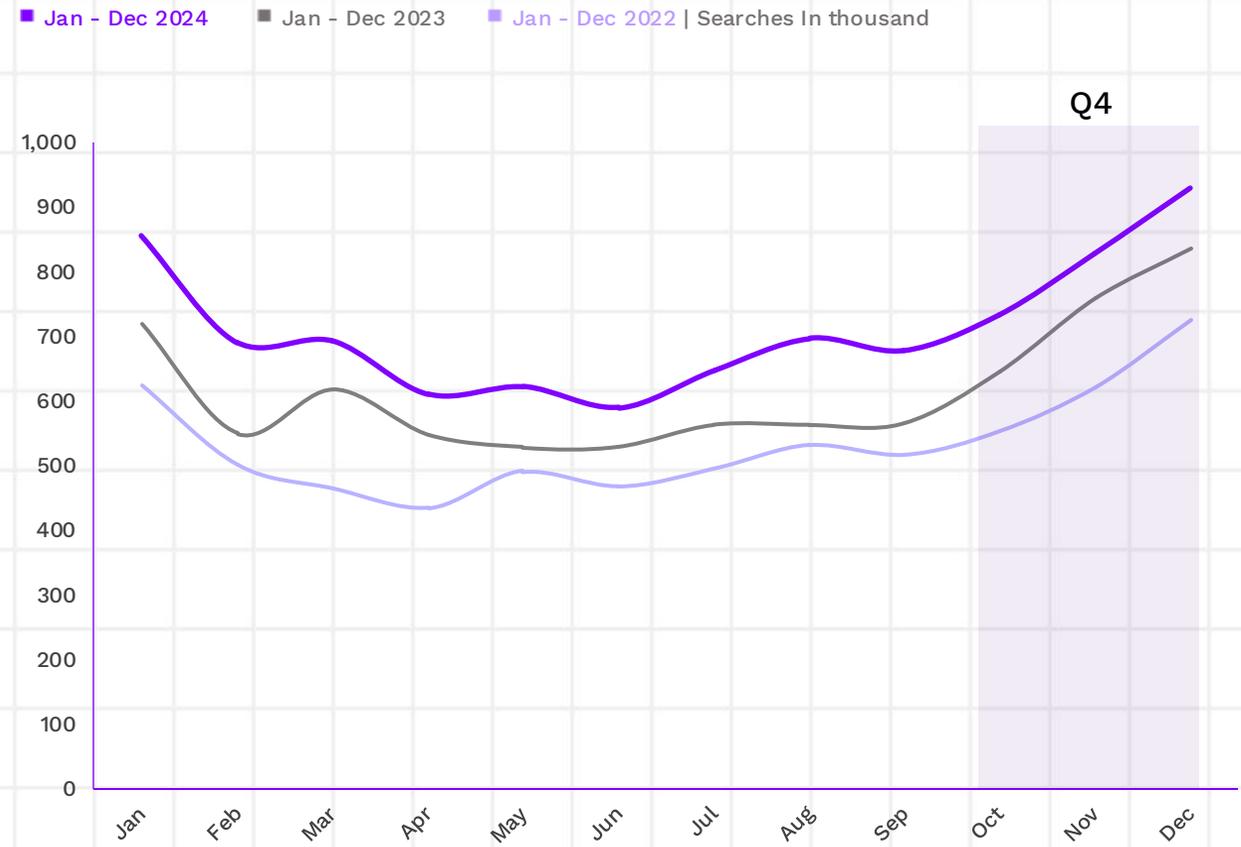
## Conclusion 2

# 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.

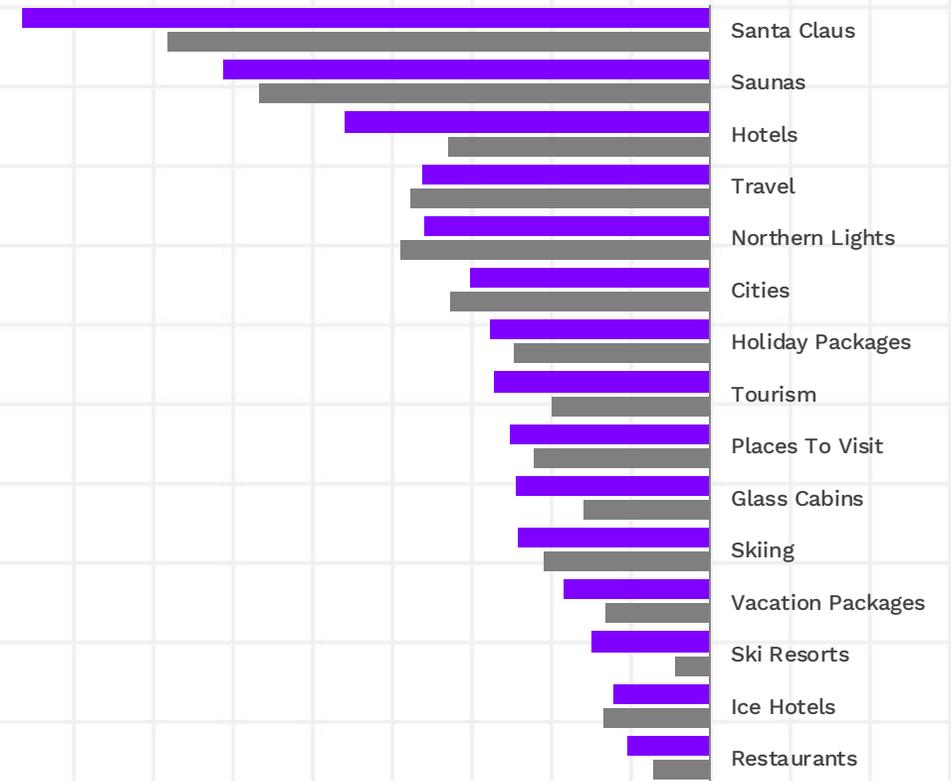
The most popular Micro-Brandtag for Q4 2024 is Santa Claus with 284K international searches. Sauna (201K) and Northern Lights (118K) are the two specific Micro-Brandtags that are in the top 5, while from the general category, only Hotels (151K) and Travel (119K) make it to the top 5.

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

■ Q4 2024 ■ Q4 2023

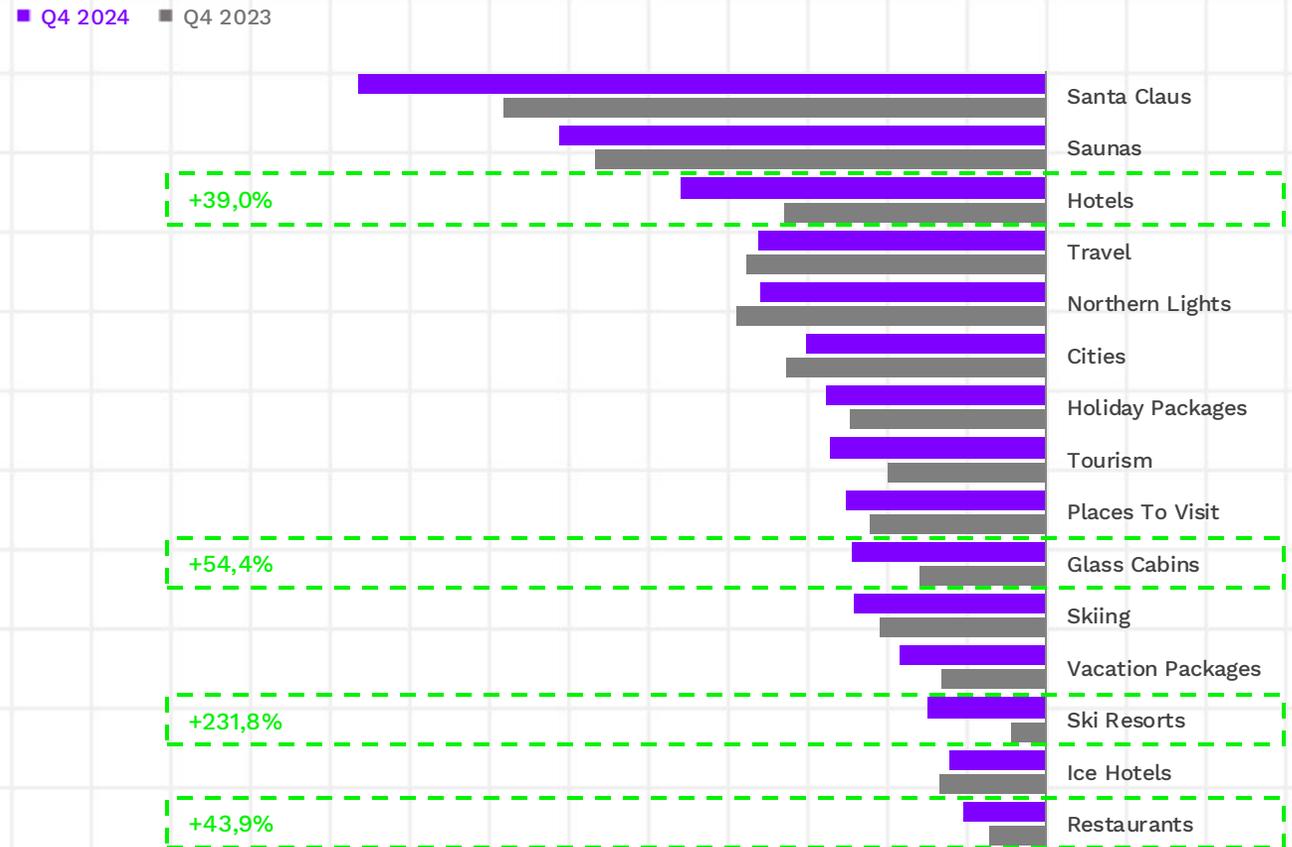


## Conclusion 4

### 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



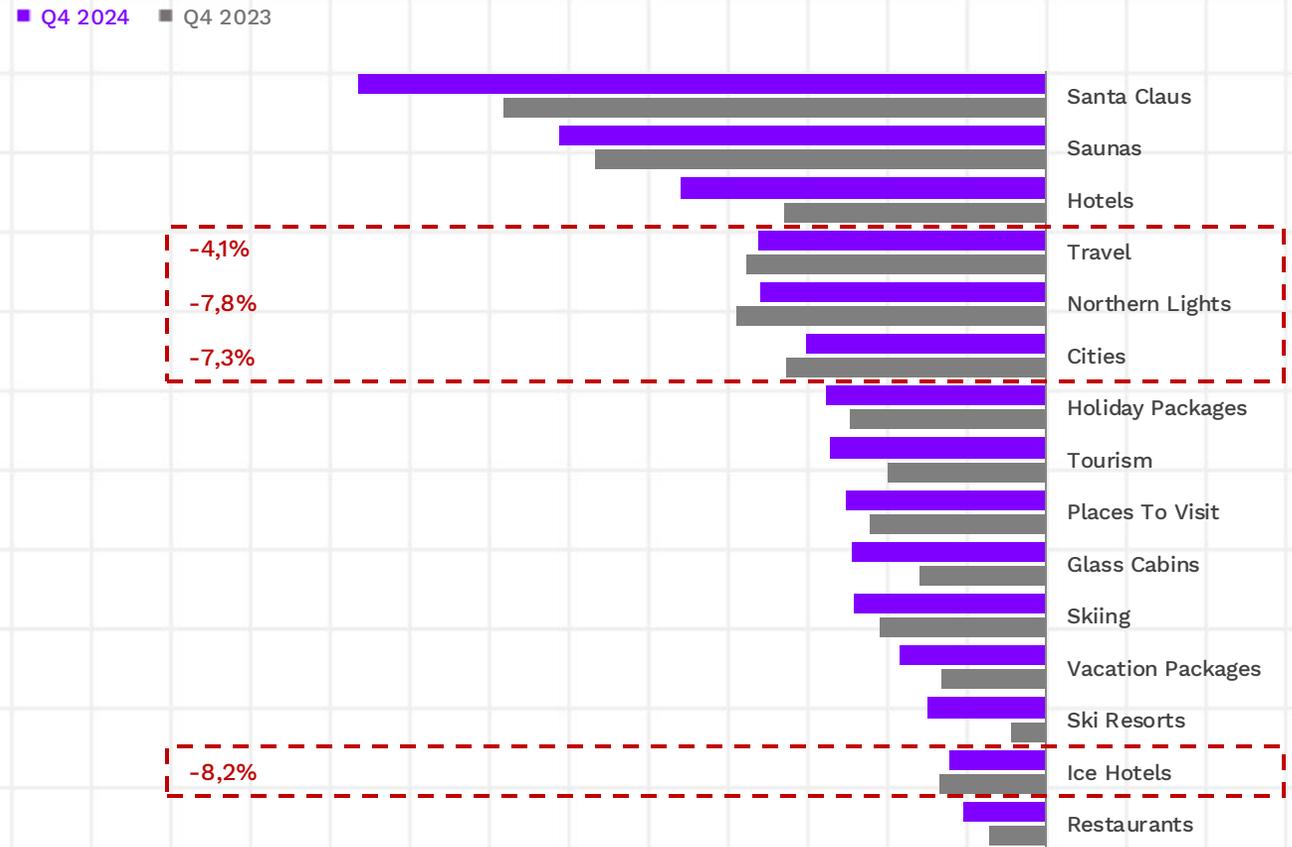
## Conclusion 4

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

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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 10<sup>th</sup> 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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## 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 10<sup>th</sup> 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 14<sup>th</sup> 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.

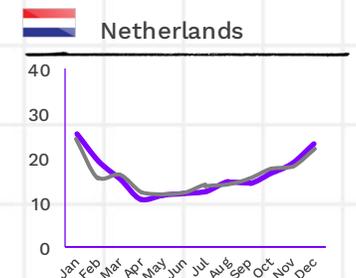
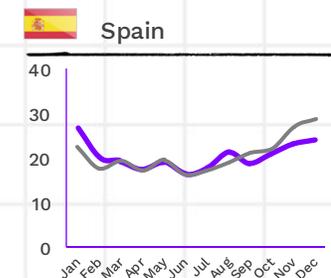
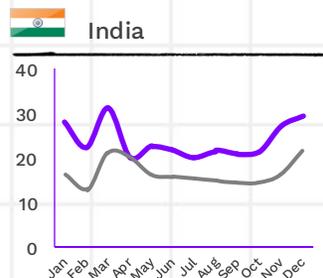
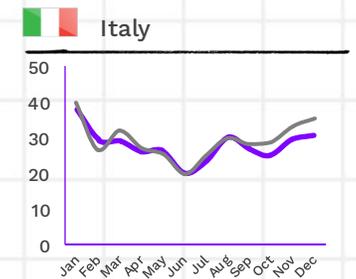
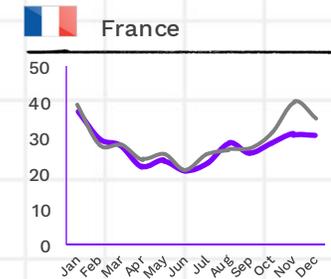
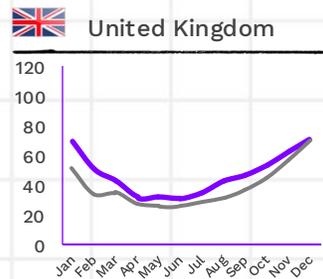
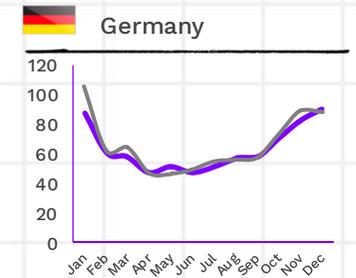
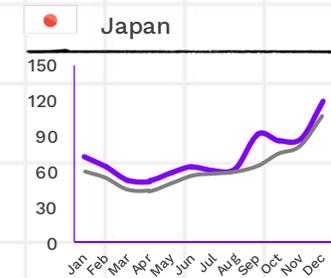
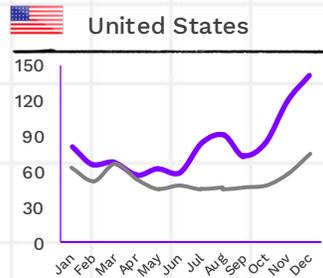
Across most distant markets, search volumes have shown consistent growth throughout the year, with South Korea and China being the only exceptions, experiencing more significant fluctuations.

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

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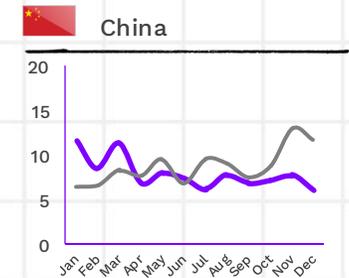
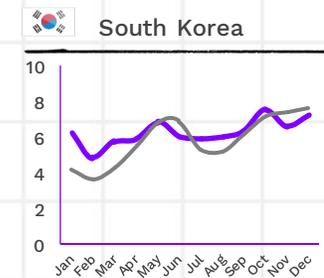
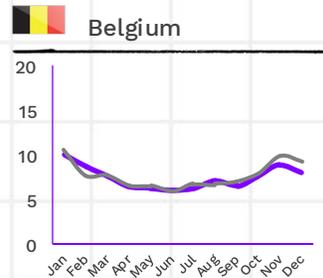
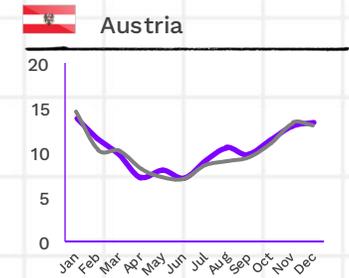
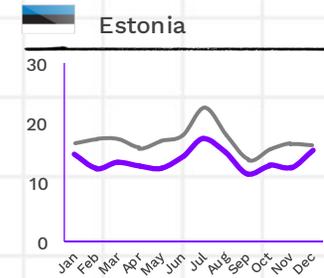
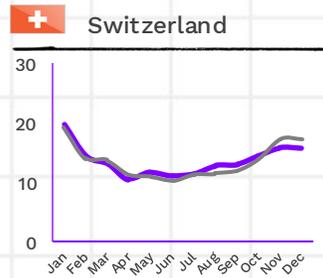
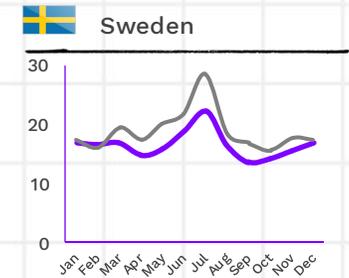
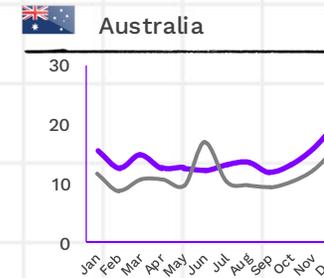
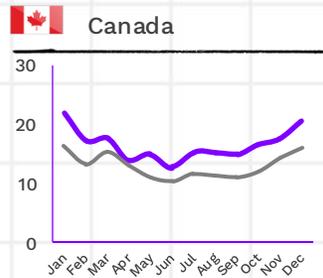
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In Q4, most countries saw a rise in search volume, continuing the upward trend. However, China stood out as the only market where search interest remained stable or even declined slightly.

### 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				Japan				Germany				Canada				Australia				Sweden			
#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth
1	Santa Claus	72K	+326%	1	Santa Claus	77K	+10%	1	Tourism Package	29K	-10%	1	Wellbeing	15K	+101%	1	Santa Claus	10K	+19%	1	Destinations	4K	+10%
2	Wellbeing	45K	+39%	2	Natural Wnd.	34K	+16%	2	Santa Claus	27K	+76%	2	Hotels	4K	-1%	2	Wellbeing	5K	+40%	2	Santa Claus	3K	+20%
3	Special Acc.	31K	+119%	3	Tourism	32K	+22%	3	Wellbeing	25K	+11%	3	Santa Claus	3K	+43%	3	Special Acc.	3K	+50%	3	Wellbeing	3K	-17%
4	Tourism Package	30K	+617	4	Travel	27K	+30%	4	Natural Wnd.	24K	-24%	4	Destinations	2K	+0%	4	Tourism Attr.	2K	+28%	4	Winter Sport.	2K	+6%
5	Hotels	25K	+181	5	Wellbeing	26K	-10%	5	Winter Sports	16K	-3%	5	Winter Wnd.	2K	-15%	5	Hotels	2K	+91%	5	Natural Wnd.	2K	-32%
6	Natural Wnd.	15K	+23	6	Gastro Activities	22K	+9%	6	Special Acc.	13K	-31%	6	Special Acc.	2K	+34%	6	Natural Wnd.	2K	-19%	6	Boating	2K	-43%
7	Tourism Attr.	15K	+46	7	Trad. Markets	13K	+6%	7	Tourism Attr.	13K	+3%	7	Tourism Attr.	2K	+28%	7	Winter Sports	2K	+46%	7	Cruises	2K	-5%
8	Tourism	11K	+58	8	Tours	8K	+26%	8	Travel	12K	-9%	8	Tourism	2K	+55%	8	Tourism Package	2K	+82%	8	Special Acc.	2K	+46%
9	Destinations	10K	+15	9	Hotels	5K	+63%	9	Destinations	8K	-24%	9	Winter Sports	2K	+35%	9	Travel	1K	-2%	9	Tourism Attr.	2K	+13%
10	Winter Sports	10K	+58	10	Restaurants	5K	+23%	10	Holiday Acc.	7K	-27%	10	Travel	1K	-19%	10	Tourism	1K	+54%	10	Hotels	1K	+41%
United Kingdom				France				Italy				Switzerland				Estonia				Austria			
#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth
1	Tourism Package	28K	-12%	1	Travel	12K	-30%	1	Wellbeing	23K	-9%	1	Natural Wnd.	5K	-27%	1	Destinations	10K	-32%	1	Natural Wnd.	4K	-20%
2	Santa Claus	18K	-23%	2	Natural Wnd.	10K	-35%	2	Natural Wnd.	14K	-14%	2	Wellbeing	3K	+5%	2	Ski Acc.	5K	+76%	2	Wellbeing	4K	+6%
3	Winter Sports	18K	+11%	3	Wellbeing	7K	-8%	3	Tourism Attr.	8K	-8%	3	Winter Sports	3K	-5%	3	Natural Wnd.	3K	-29%	3	Santa Claus	3K	+70%
4	Special Acc.	18K	+55%	4	Destinations	7K	-7%	4	Travel	5K	-12%	4	Tourism Package	2K	-12%	4	Winter Sporta	3K	+6%	4	Tourism Pac.	3K	-2%
5	Hotels	14K	+112%	5	Tourism Attr.	5K	-15%	5	Santa Claus	3K	-63%	5	Travel	2K	-24%	5	Travel	1K	-9%	5	Tourism Attr.	2K	-2%
6	Ski Acc.	11K	+620%	6	Hotels	4K	+8%	6	Special Acc.	3K	+14%	6	Special Acc.	2K	+7%	6	Wellbeing	1K	-16%	6	Wellbeing	2K	-5%
7	Wellbeing	10K	+16%	7	Winter Sports	4K	+2%	7	Destinations	3K	+6%	7	Tourism Attr.	2K	-8%	7	Museums	1K	+19%	7	Travel	2K	-3%
8	Natural Wnd.	7K	-23%	8	Tourism	4K	-12%	8	Hotels	2K	+47%	8	Hotels	2K	+47%	8	Entert. Parks	0.7K	-39%	8	Special Acc.	1K	-20%
9	Tourism Attr.	7K	+1%	9	Tourism Package	2K	-7%	9	Tourism	1K	-10%	9	Santa Claus	2K	+8%	9	Parks & Reserves	0.6K	+152%	9	Destinations	1K	+13%
10	Destinations	6K	-3%	10	Special Acc.	2K	-25%	10	Tourism Package	1K	-14%	10	Destinations	1K	-27%	10	Tourism Package	0.6K	+2%	10	Camping	0.8K	-2%
India				Spain				Netherlands				Belgium				South Korea				China			
#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth	#	Brandtag	Searches	Growth
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2	Tourism	8K	+127%	2	Tourism Attr.	7K	+0%	2	Santa Claus	5K	-23%	2	Travel	1K	-26%	2	Natural Wnd.	4K	-9%	2	Travel	6K	+19%
3	Destinations	7K	+20%	3	Travel	6K	-24%	3	Restaurants	5K	+601%	3	Wellbeing	1K	-3%	3	Travel	2K	-11%	3	Winter Sport.	0.8K	-52%
4	Hotels	7K	+84%	4	Santa Claus	6K	-25%	4	Natural Wnd.	4K	-18%	4	Winter Sports	1K	-22%	4	Tourism Attr.	2K	+6%	4	Natural Wnd.	0.2K	-23%
5	Santa Claus	5K	+71%	5	Destinations	5K	-4%	5	Travel	3K	-19%	5	Destinations	1K	-12%	5	Special Acc.	1K	+41%	5	Shopping	0.2K	-44%
6	Tourism Attr.	5K	+22%	6	Special Acc.	2K	-26%	6	Winter Sports	3K	-3%	6	Tourism Attr.	1K	+12%	6	Hotels	0.9K	+9%	6	Tourism Attr.	0.2K	+5%
7	Special Acc.	5K	+144%	7	Wellbeing	2K	+11%	7	Wellbeing	3K	-4%	7	Tourism Package	1K	-14%	7	Santa Claus	0.8K	+17%	7	Hotels	0.2K	-9%
8	Natural Wnd.	3K	+20%	8	Nightlife	2K	+24%	8	Special Acc.	1K	+11%	8	Santa Claus	1K	-40%	8	Special Events	0.5K	-32%	8	Santa Claus	0.2K	-13%
9	Wellbeing	2K	-7%	9	Hotels	1K	-8%	9	Ski Acc.	1K	+55%	9	Tourism	0.9K	+9%	9	Happiness	0.4K	+2%	9	Wellbeing	0.2K	-13%
10	Travel	2K	-10%	10	Winter Sports	1K	+7%	10	Camping	1K	-13%	10	Hotels	0.7K	+6%	10	Animal Watching	0.4K	+58%	10	Tourism Pac.	0.1K	+13%

Legend & Special Acc. – Special Accommodation; Natural Wnd. – Natural Wonders; Tourism Attr. – Tourism Attractions; Holiday Acc. – Holiday Accommodation; Ski Acc. – Ski Accommodation; Entert. Parks – Entertainment Parks

## 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.

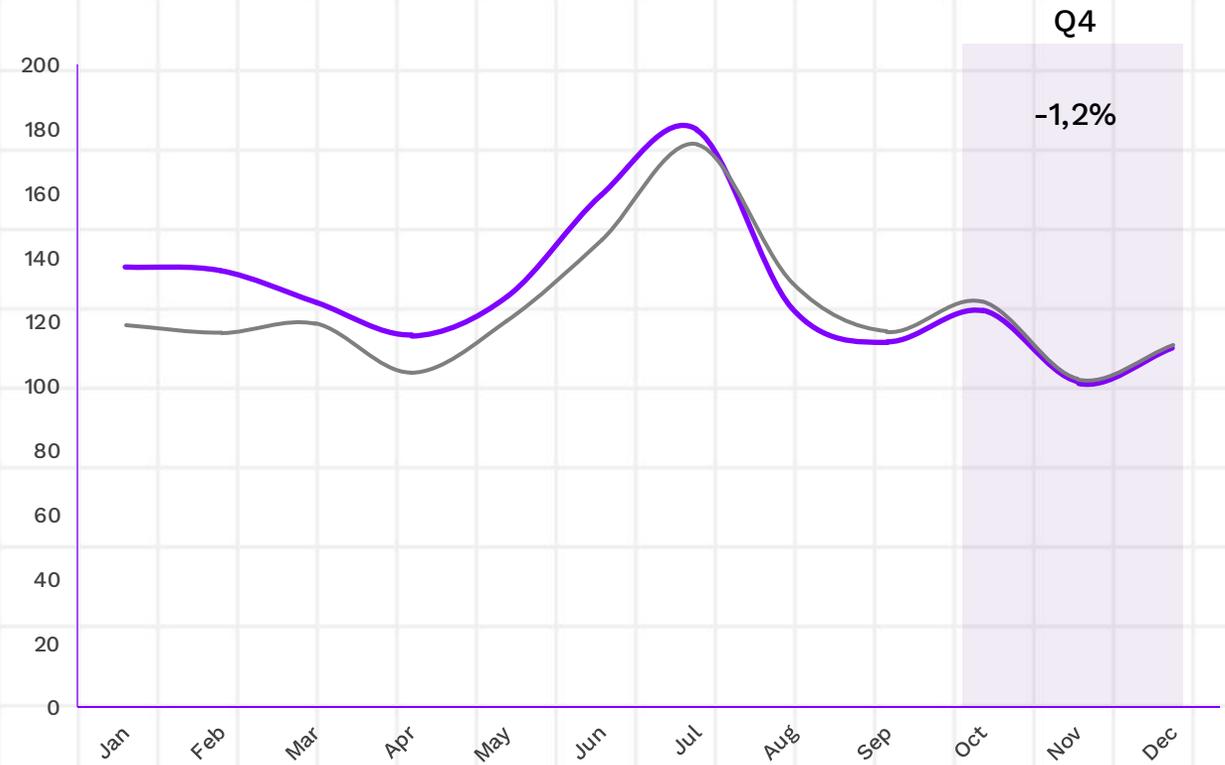
After a period of declining searches, October saw figures approaching those of Q4 2023, although they were still 1,98% lower than in the same month last year (123K compared to 126K).

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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