



Finland's Touristic Demand

2019 in review

Revised version - August 31st, 2020

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Google



Google Search

I'm Feeling Lucky



#Digitalidentity
#Digitalcountry

Demand



#Digital identity

Demand



#Digital identity

Supply



Digital
Demand



#Digital identity



Digital
Supply





Digital Demand



Benchmark



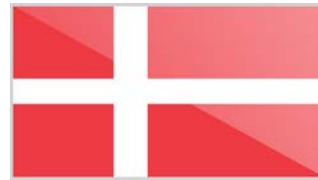


Benchmark





Benchmark



45,91

Million searches 2019



Benchmark



45,91

Million searches 2019

+12,9%

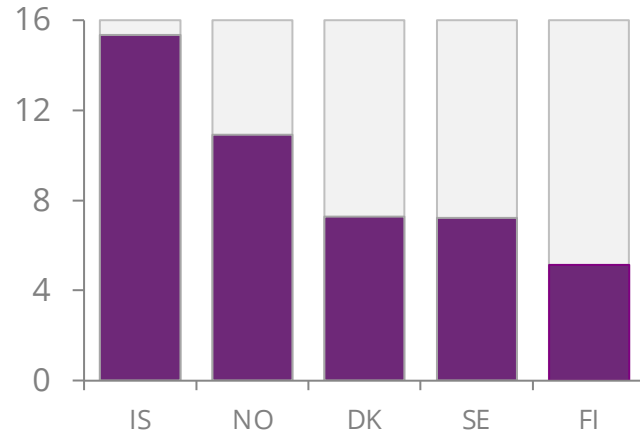
Avg growth 2018-2019

Digital Demand for Finland and competitors



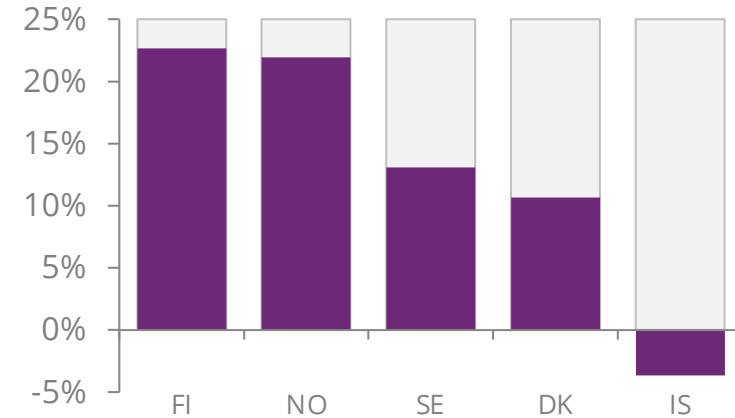
Benchmark searches results 2019

Million searches

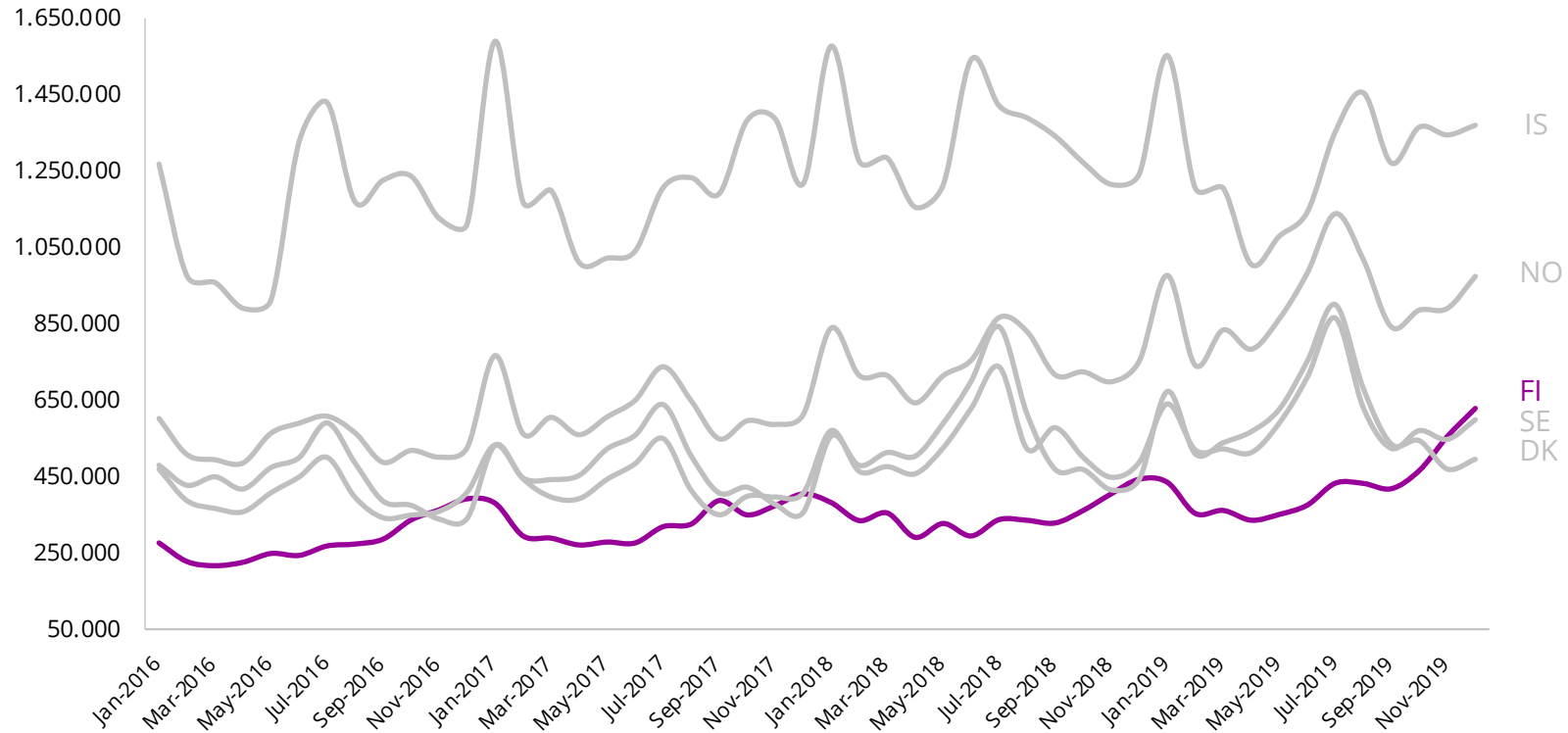


Benchmark searches growth 2018-19

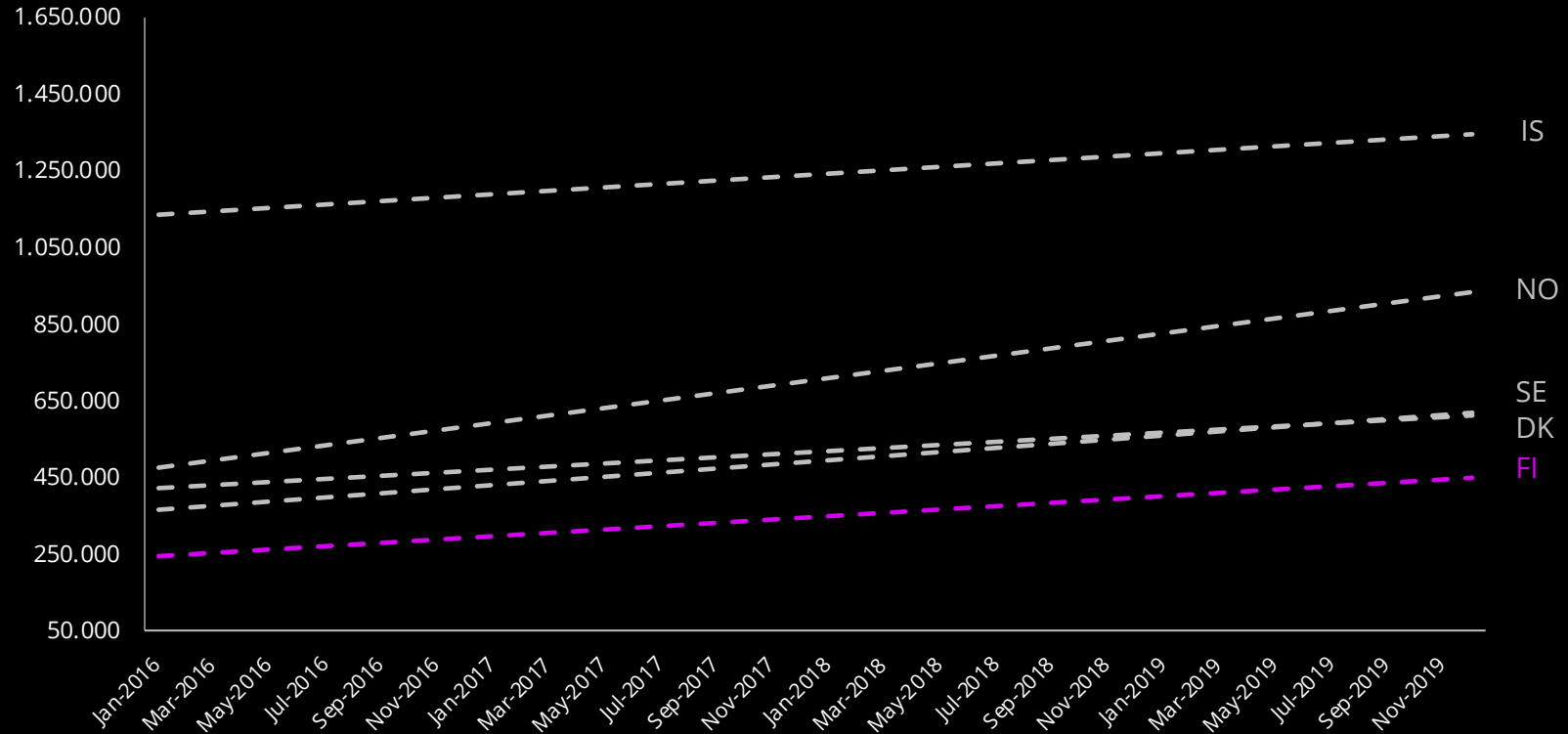
Percentage (%)



Digital Demand evolution over the last 4 years in the region



Digital Demand evolution over the last 4 years in the region



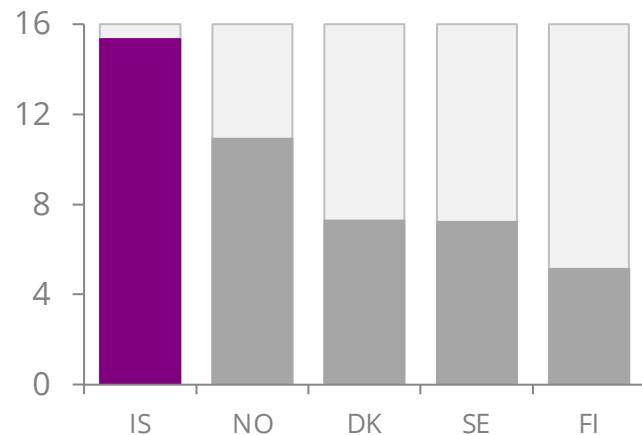


Iceland leads, but experiencing decrease in appeal



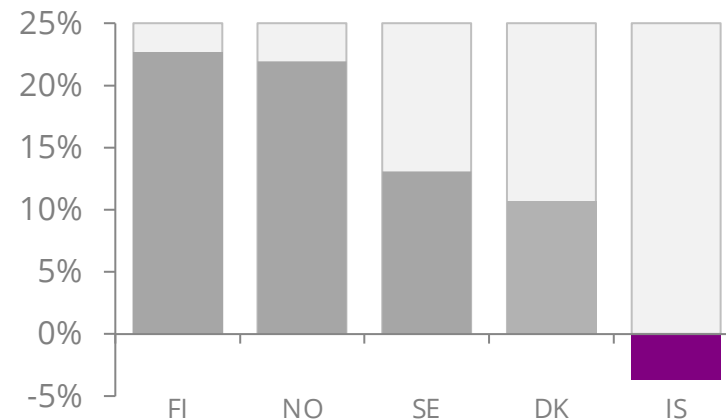
Benchmark searches results 2019

Million searches



Benchmark searches growth 2018-19

Percentage (%)





Lots of things happened in the last 5 years...



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Iceland

A 2016 football moment to remember: Iceland light up Euro 2016

How Icelandair Transformed the Country

by LILIT MARCUS



TourismReview
NEWS

Respected Voice of Tourism



HOME WEEKLY TRAVEL NEWS TOP 10'S TRAVEL NEWS TOURISM MAGAZINE PR WIRE ABOUT CONTACT US

HOME Tourism Magazine Tourism Review Online Magazine 1 / 2011 Joining Forces: Inspired by Iceland

Tourism Promo Campaign Helped the Industry

Wayne M. Gore - Dec 27, 2010 0

Das Wunder von Island - nicht nur beim Fußball

Nach einer schweren Krise boomt Islands Wirtschaft wieder. Und wenn's richtig gut läuft, werfen die Wikinger auch mal mit Quark um sich. VON SONJA ÁLVAREZ

Why is everyone traveling to Iceland?

By Brandon Presser
May 30, 2017

BBC

BBC Account

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Islandia, el país que tiene cinco veces más turistas que habitantes

Iceland used to be the hottest tourism destination. What happened?



Economics

Icelanders in Shock as Tourism Collapse Halts Economic Miracle



The New York Times

Wow Air, an Icelandic Budget Airline, Suspends Service

Efforts to raise money had failed, prompting the company to cease all flights on Thursday morning.



As its financial difficulties mounted, Wow Air reduced its fleet of planes to 11 from 20. Joel Sage
France-Press — Getty Images

Adventure.com

PEOPLE

PLACES

EXPERIENCES



Europe's prom queen has a headache: Has Iceland become too popular?



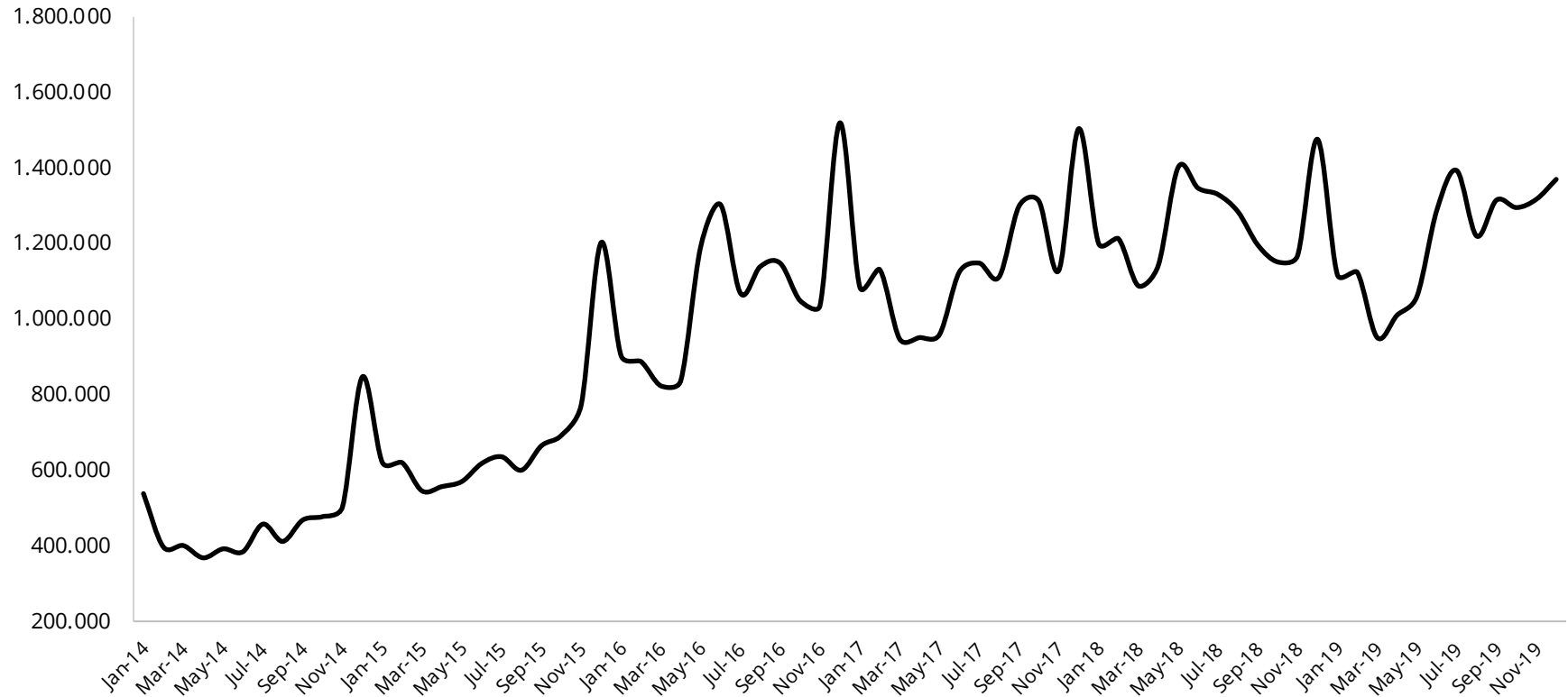
Are too many tourists visiting Iceland?

By Edwin Lane
BBC Business reporter, Iceland

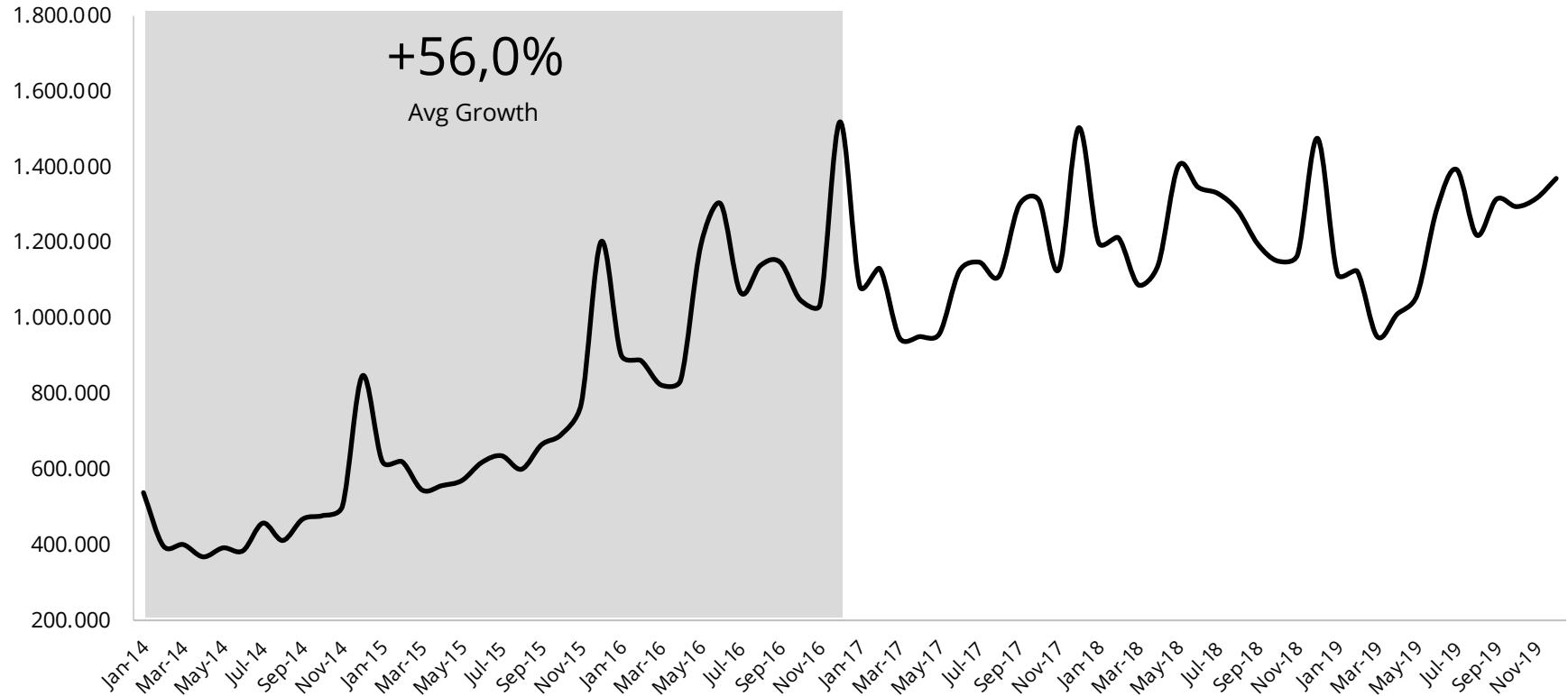
27 October 2017

Facebook Twitter Email Share

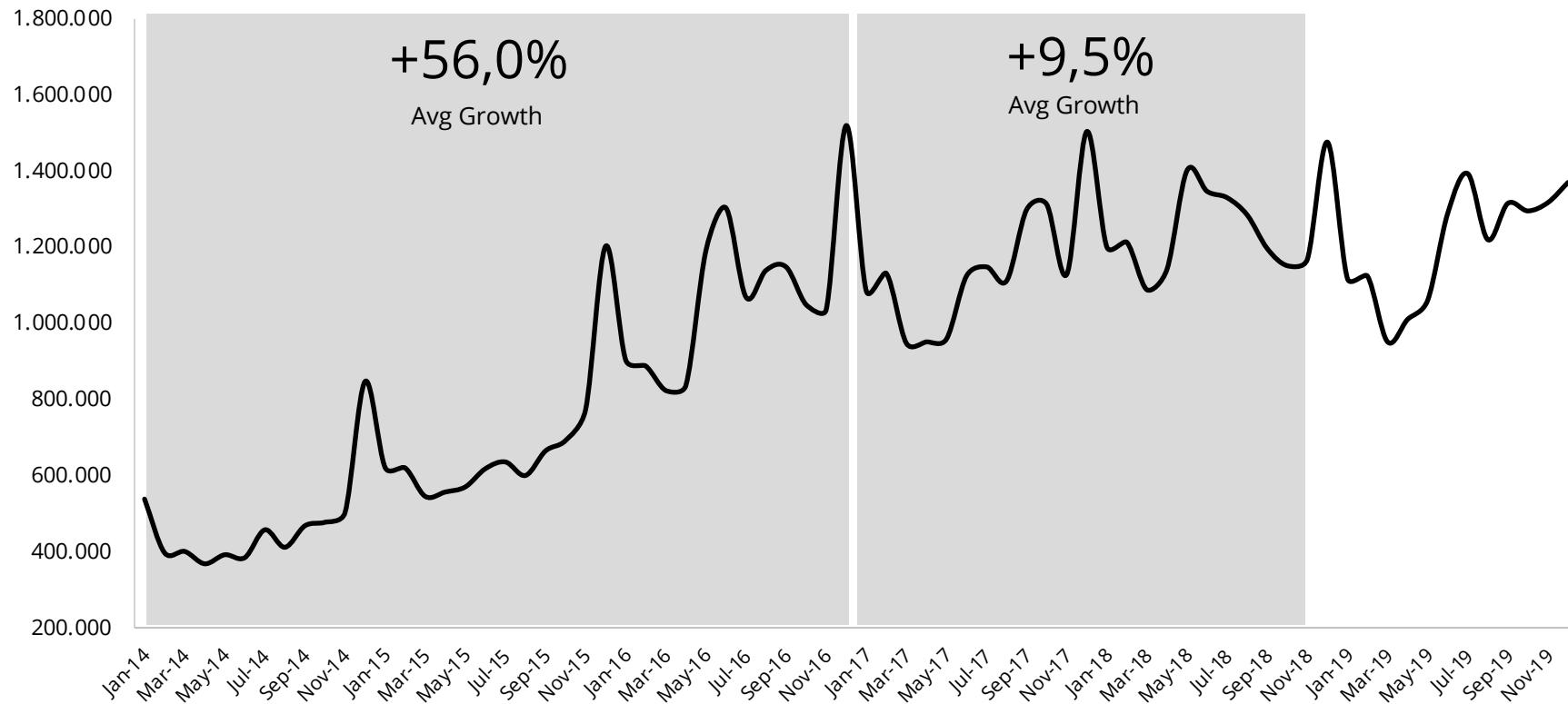
Iceland's evolution of searches



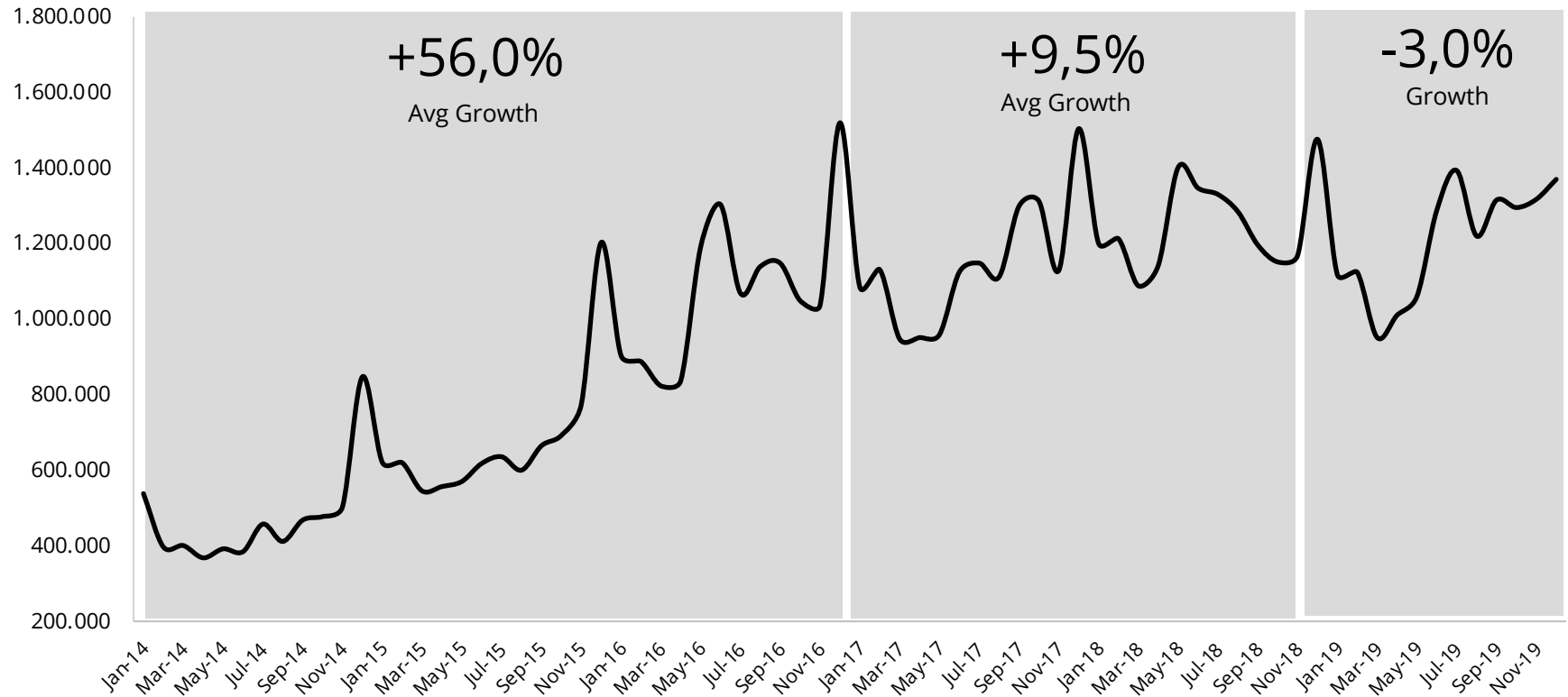
Iceland's evolution of searches



Iceland's evolution of searches



Iceland's evolution of searches



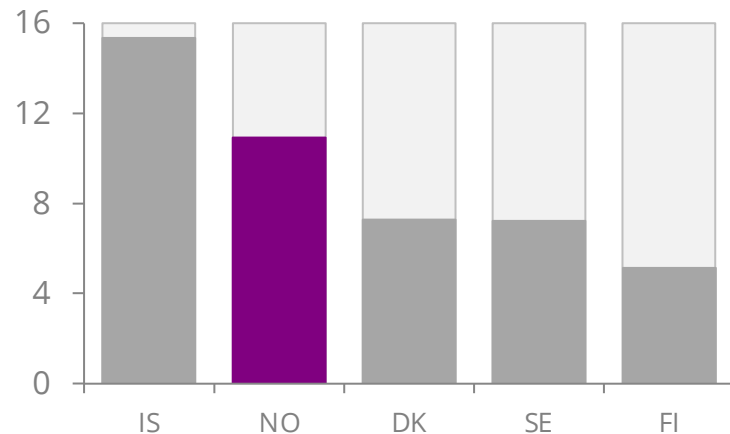


Norway just ranks behind Iceland and experiences high growth



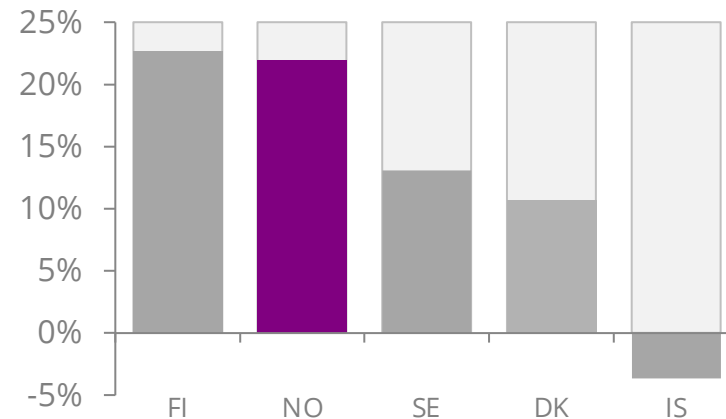
Benchmark searches results 2019

Million searches

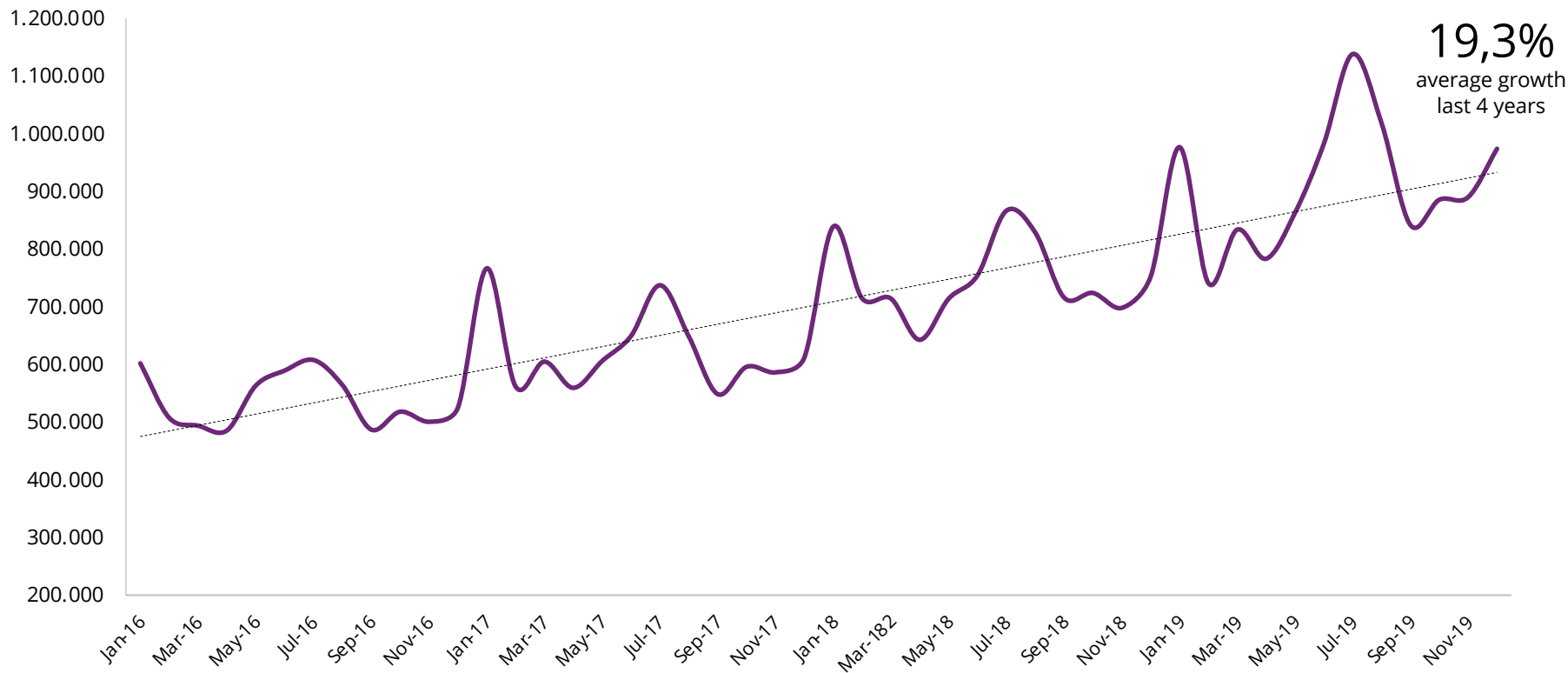


Benchmark searches growth 2018-19

Percentage (%)



A steady and high growth since 2016



Based on established image around Fjords and Northern Lights,

Top 12 Micro-Brandtags for Norway

2016

1. Fjords and Glaciers
2. Travel
3. Northern Lights
4. Cruises
5. Tourism
6. Holiday Packages
7. Visit
8. Fishing
9. Places to Visit
10. Vacation Packages
11. Skiing
12. Camping

2017

1. Fjords and Glaciers
2. Northern Lights
3. Travel
4. Cruises
5. Tourism
6. Holiday Packages
7. Camping
8. Places to Visit
9. Visit
10. Vacation Packages
11. Cities
12. Fishing

2018

1. Fjords and Glaciers
2. Travel
3. Northern Lights
4. Tourism
5. Cruises
6. Camping
7. Holiday Packages
8. Places to Visit
9. Cities
10. Vacation Packages
11. Visit
12. Fishing

2019

1. Fjords and Glaciers
2. Northern Lights
3. Travel
4. Tourism
5. Cruises
6. Camping
7. Places to Visit
8. Holiday Packages
9. Cities
10. Vacation Packages
11. Visit
12. Fishing

Based on established image around Fjords and Northern Lights, With less reliance on traditional brandtags

Top 12 Micro-Brandtags for Norway

2016

1. Fjords and Glaciers
2. Travel
3. Northern Lights
4. Cruises
5. Tourism
6. Holiday Packages
7. Visit
8. Fishing
9. Places to Visit
10. Vacation Packages
11. Skiing
12. Camping

2017

1. Fjords and Glaciers
2. Northern Lights
3. Travel
4. Cruises
5. Tourism
6. Holiday Packages
7. Camping
8. Places to Visit
9. Visit
10. Vacation Packages
11. Cities
12. Fishing

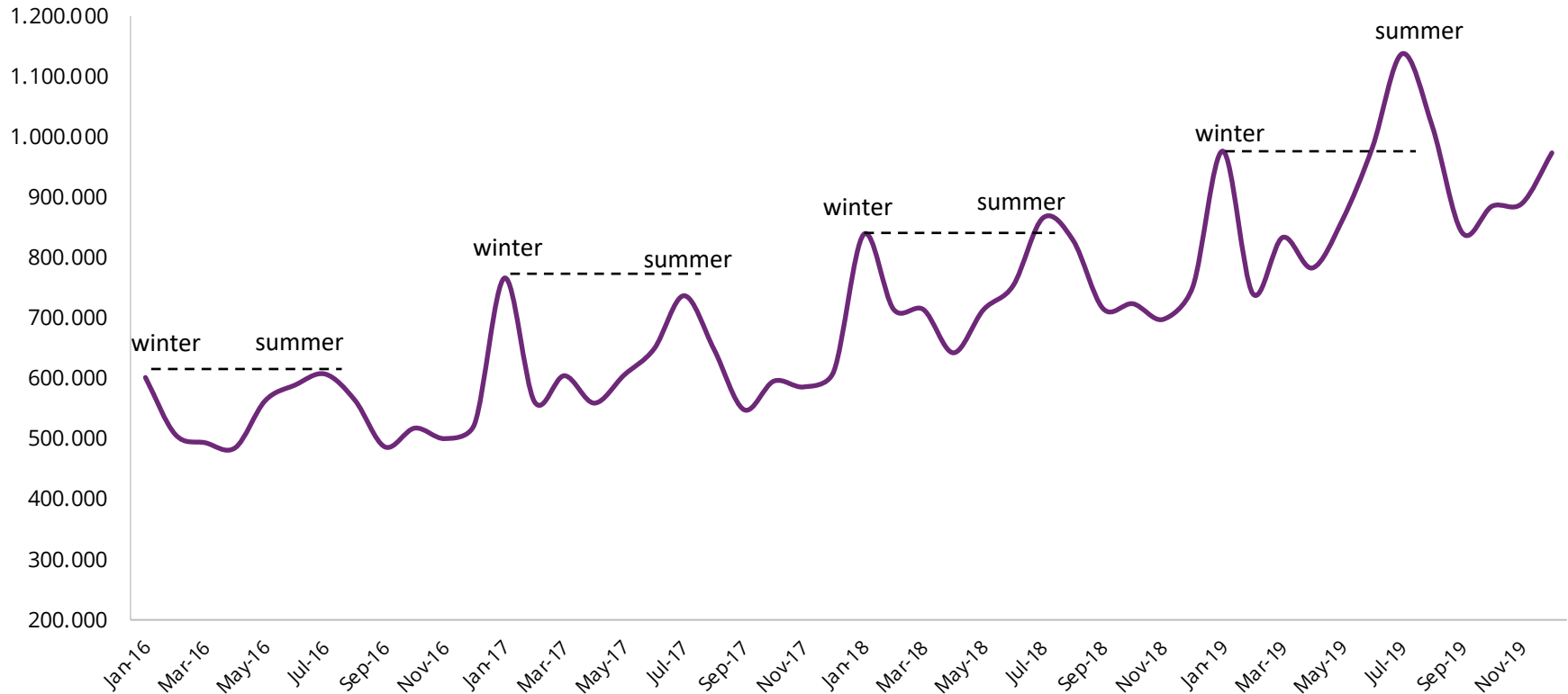
2018

1. Fjords and Glaciers
2. Travel
3. Northern Lights
4. Tourism
5. Cruises
6. Camping
7. Holiday Packages
8. Places to Visit
9. Cities
10. Vacation Packages
11. Visit
12. Fishing

2019

1. Fjords and Glaciers
2. Northern Lights
3. Travel
4. Tourism
5. Cruises
6. Camping
7. Places to Visit
8. Holiday Packages
9. Cities
10. Vacation Packages
11. Visit
12. Fishing

Norway is summer destination!



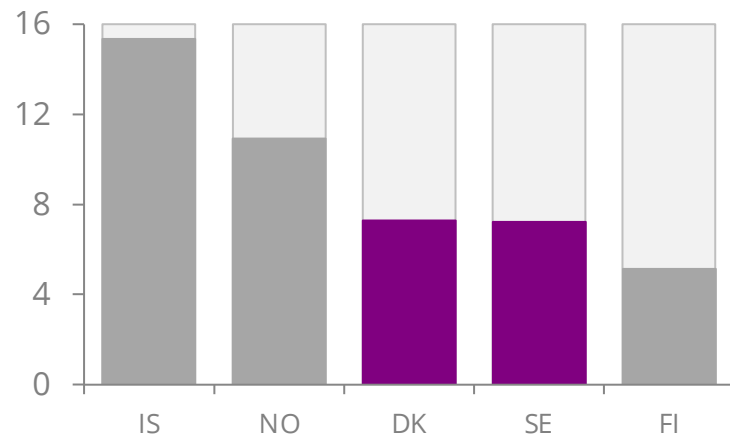


Denmark and Sweden have a similar result and the growth



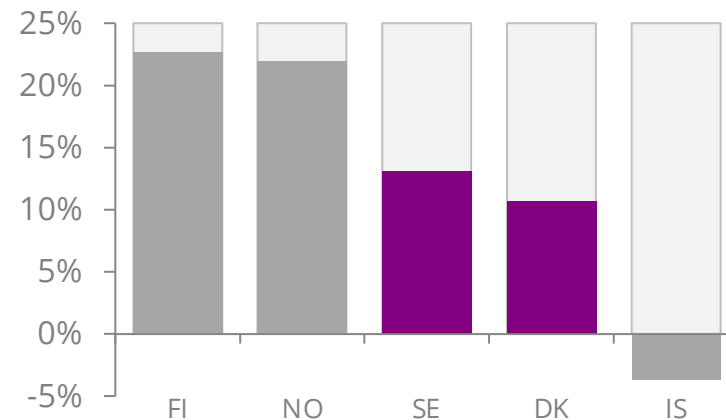
Benchmark searches results 2019

Million searches

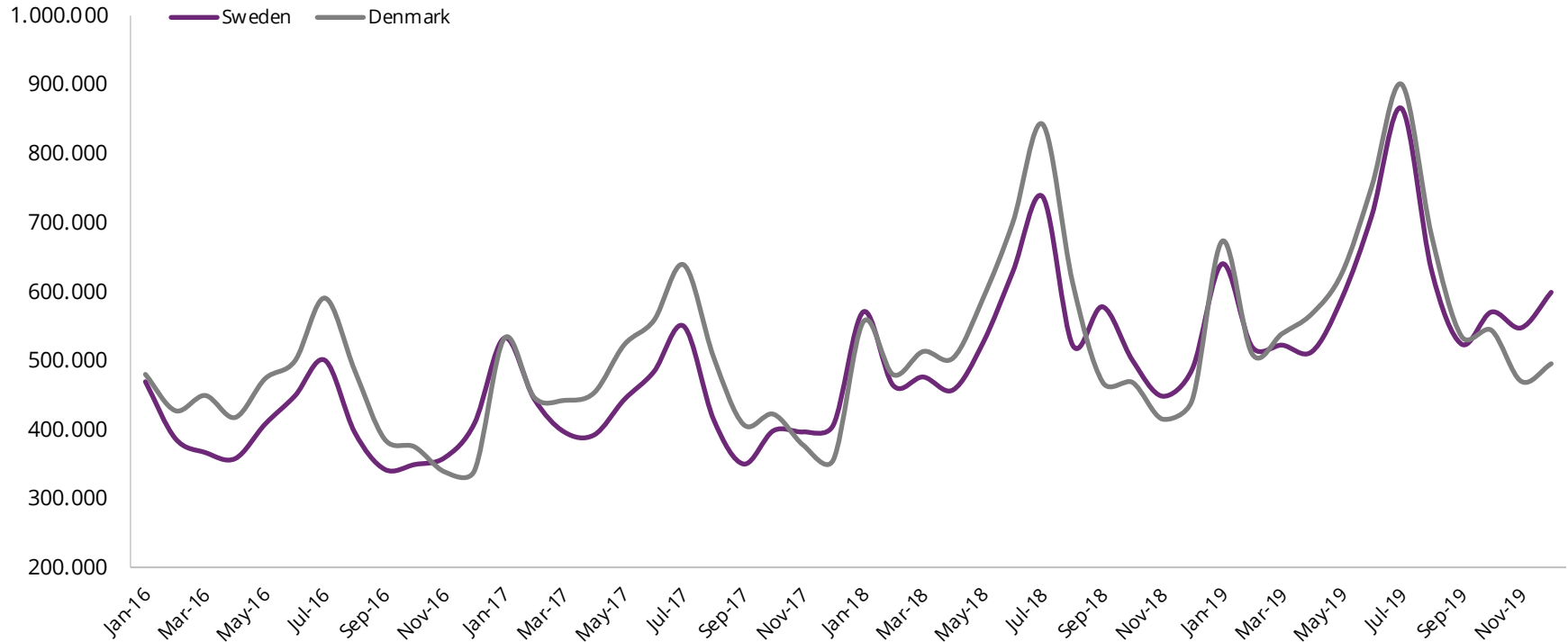


Benchmark searches growth 2018-19

Percentage (%)



The trends of Denmark and Sweden are aligned...



... and the touristic offers of Denmark and Sweden are the same, based on “generic” searches, camping and “packages” and rentals

Top Micro-Brandtags

 Denmark

1. Holiday Apartments
2. Camping
3. Vacation Packages
4. Places to Visit
5. Tourism
6. Holiday Packages
7. Cities
8. Travel
9. Holiday Houses
10. Tours
11. Weddings
12. Holiday Rentals

 Sweden

1. Camping
2. Holiday Apartments
3. Cities
4. Vacation Packages
5. Holiday Packages
6. Places to Visit
7. Travel
8. Tourism
9. Igloos Ice Hotels
10. Northern Lights
11. Skiing
12. Tourism Attractions

... and the touristic offers of Denmark and Sweden are the same, based on “generic” searches, camping and “packages” and rentals

Top Micro-Brandtags

 Denmark

1. Holiday Apartments
2. Camping
3. Vacation Packages
4. Places to Visit
5. Tourism
6. Holiday Packages
7. Cities
8. Travel
9. Holiday Houses
10. Tours
11. Weddings
12. Holiday Rentals

 Sweden

1. Camping
2. Holiday Apartments
3. Cities
4. Vacation Packages
5. Holiday Packages
6. Places to Visit
7. Travel
8. Tourism
9. Igloos Ice Hotels
10. Northern Lights
11. Skiing
12. Tourism Attractions

Conclusions for the competitors



Iceland leads the ranking despite the recent decrease in demand for the first time in 5 years.



Norway has grown steady in the last years and is reducing the gap with Iceland. Norway is seen more and more as a “Summer” and *Fjord* destination.



Denmark has a stable demand based on high *Generic* searches, *Camping* and *Packages*, but also on *Tours*, *Weddings* and *Holiday rentals*.



Sweden has a stable demand based on high “city” appeal and “generic” searches. *Camping* for the first time is becoming a top touristic asset.

Finland



Conclusions

1. Finland is the fastest growing country compared to other countries in the North.

Finland

5,1

million searches
in 2019*

23%

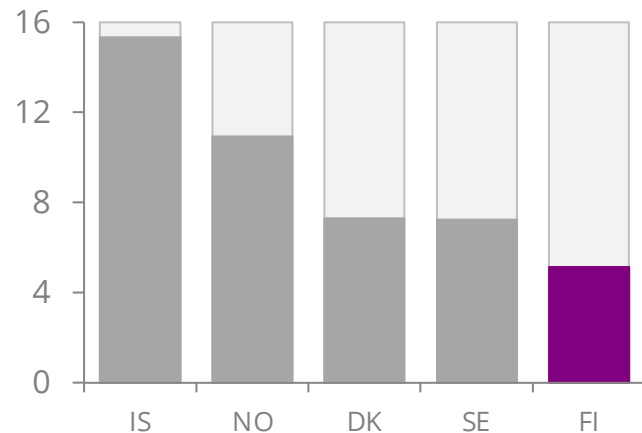
growth
in 2018-2019*

Finland is the fastest growing country but still at the back of the benchmark in terms of touristic appeal



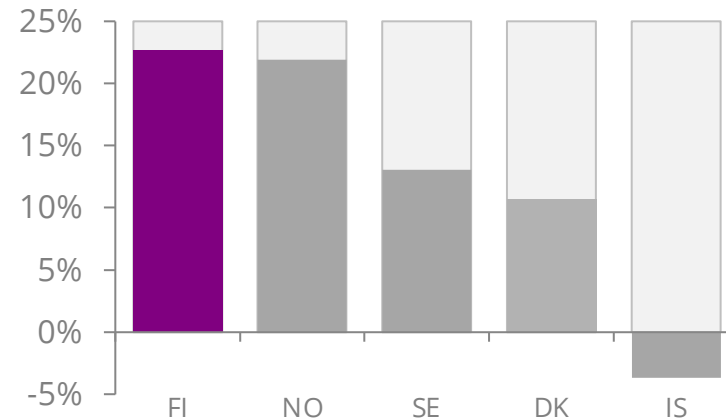
Benchmark searches results 2019

Million searches



Benchmark searches growth 2018-19

Percentage (%)



Conclusions

1. Finland is the fastest growing country compared to other countries in the North.
2. Increase demand for the top brandtags, more than ever.

Top touristic activities in Finland remain the same, and this year are the fastest growing...

Northern Lights



#2
447.662 searches
+49,1%

Saunas



#4
296.839 searches
+43,3%

Igloos Ice Hotels



#6
242.199 searches
+34,3%

... experiencing a gain in the total digital demand market share for Finland

Northern Lights



#2
447.662 searches
+49,1%

Market share 2018
7,2% → Market share 2019
8,7%

Saunas



#4
296.839 searches
+43,3%

Market share 2018
4,9% → Market share 2019
5,8%

Igloos Ice Hotels



#6
242.199 searches
+34,3%

Market share 2018
4,3% → Market share 2019
4,7%

Finland's top brandtags

Top Micro-Brandtags	Growth
1. Tourism	+2,2%
2. Northern Lights	+49,1%
3. Travel	+19,3%
4. Saunas	+43,3%
5. Places to Visit	+15,9%
6. Igloos Ice Hotels	+34,3%
7. Cities	+17,2%
8. Santa Claus	+21,2%
9. Holiday Packages	+33,0%
10. Hotels	+47,8%
11. Lakes	-7,7%
12. Camping	+41,7%

Top and fastest growing

Northern Lights

Northern Lights Competitors Ranking



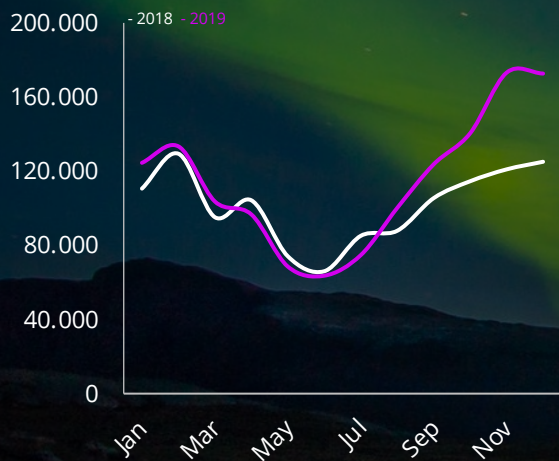
Northern Lights



Northern Lights

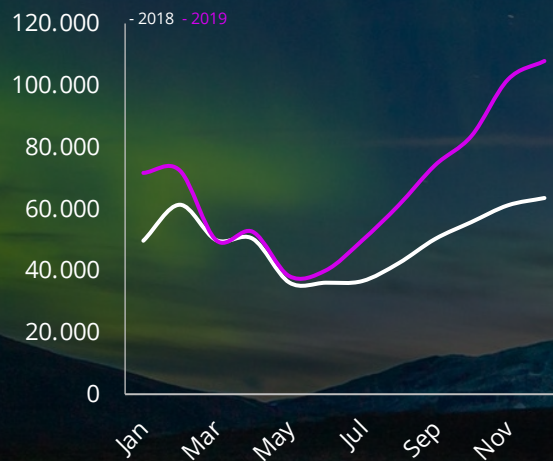
 Iceland

growth = +15.6%



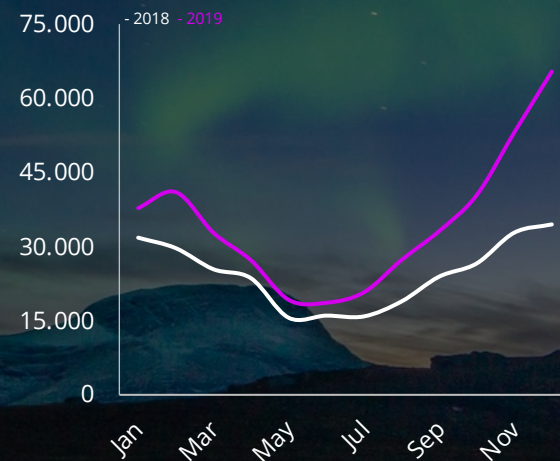
 Norway

growth = +38.1%



 Finland

growth = +49.1%



Northern Lights is an important activity not only for Finland



Iceland

1. Northern Lights
2. Travel
3. Tourism
4. Volcanoes
5. Holiday Packages
6. Tours
7. Vacation Packages
8. Things to Do
9. Places to Visit
10. Hotels
11. Visit
12. Fjords and Glaciers
13. Camping
14. Waterfalls
15. Springs



Norway

1. Fjords and Glaciers
2. Northern Lights
3. Travel
4. Tourism
5. Cruises
6. Camping
7. Places to Visit
8. Holidays Packages
9. Cities
10. Vacation Packages
11. Visit
12. Fishing
13. Tours
14. Skiing
15. Hiking



Finland

1. Tourism
2. Northern Lights
3. Travel
4. Saunas
5. Places to Visit
6. Igloos Ice Hotels
7. Cities
8. Santa Claus
9. Holiday Packages
10. Hotels
11. Lakes
12. Camping
13. Visit
14. Vacation Packages
15. Things to Do



Sweden

1. Camping
2. Holidays Apartments
3. Cities
4. Vacation Packages
5. Holiday Packages
6. Places to Visit
7. Travel
8. Tourism
9. Igloo Ice Hotels
10. Northern Lights
11. Skiing
12. Squares
13. Tourism Attractions
14. Hotels
15. Towns

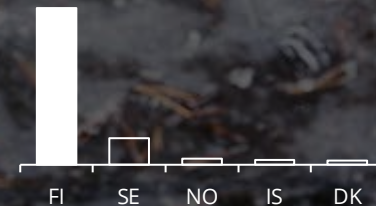


Denmark

1. Holiday Apartments
2. Camping
3. Vacation Packages
4. Places to Visit
5. Tourism
6. Holiday Packages
7. Cities
8. Travel
9. Holiday Houses
10. Tours
11. Weddings
12. Holiday Rentals
13. Beaches
14. Islands
15. Hotels

Saunas

Saunas Competitors Ranking



Saunas



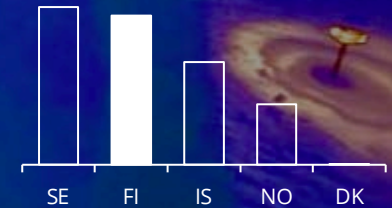


The markets which searched most about Saunas are Japan and Italy with almost 50% market share

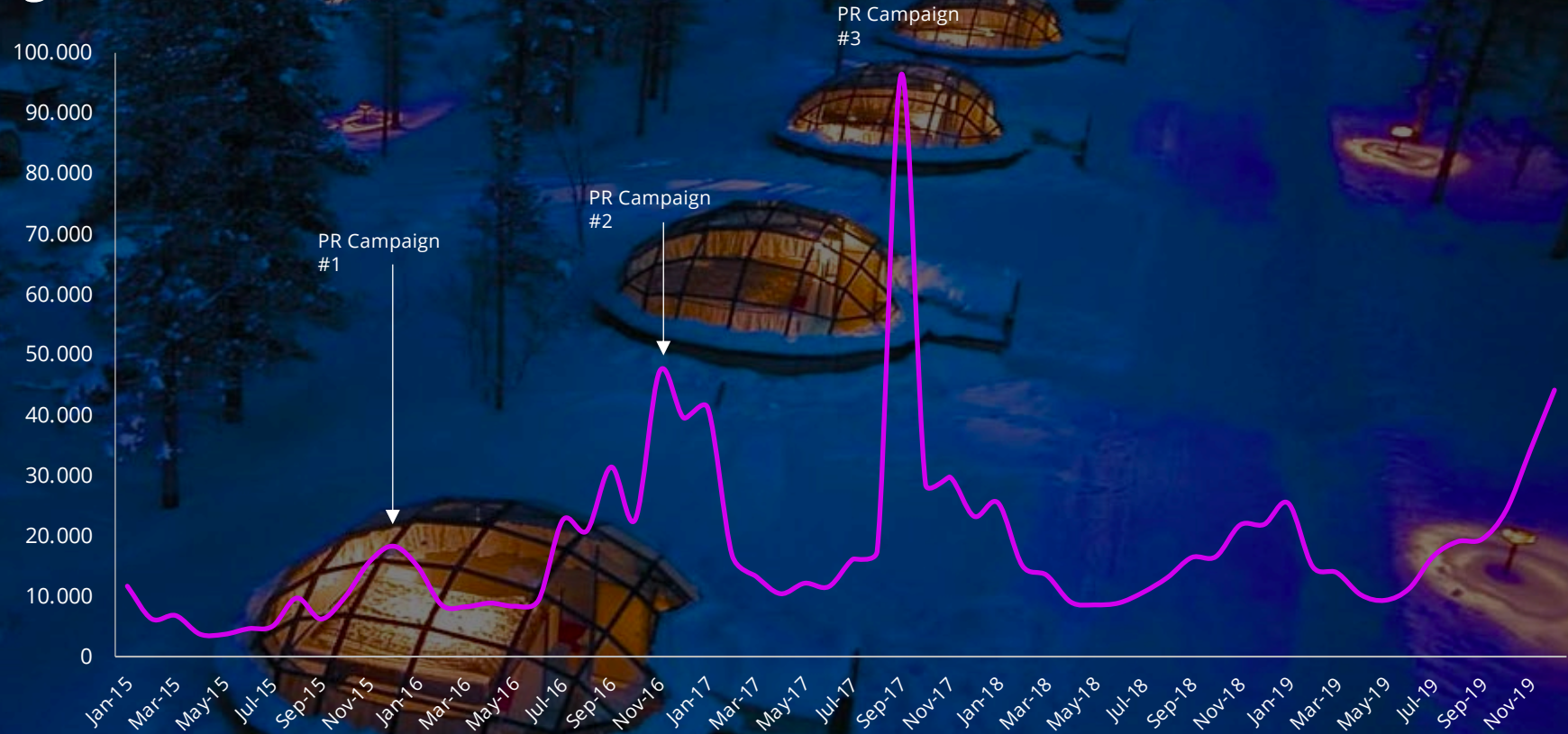
Top TMS	Searches 2019	Growth
1. Japan	74.038	91.4%
2. Italy	68.758	27.2%
3. United States	22.900	17.4%
4. Netherlands	19.143	29.6%
5. France	18.886	67.1%
6. Spain	15.706	33.2%
7. Germany	9.349	27.9%
8. Russia	6.162	36.3%
9. Sweden	4.985	39.1%
10. South Korea	4.911	11.3%

Igloos Ice Hotels

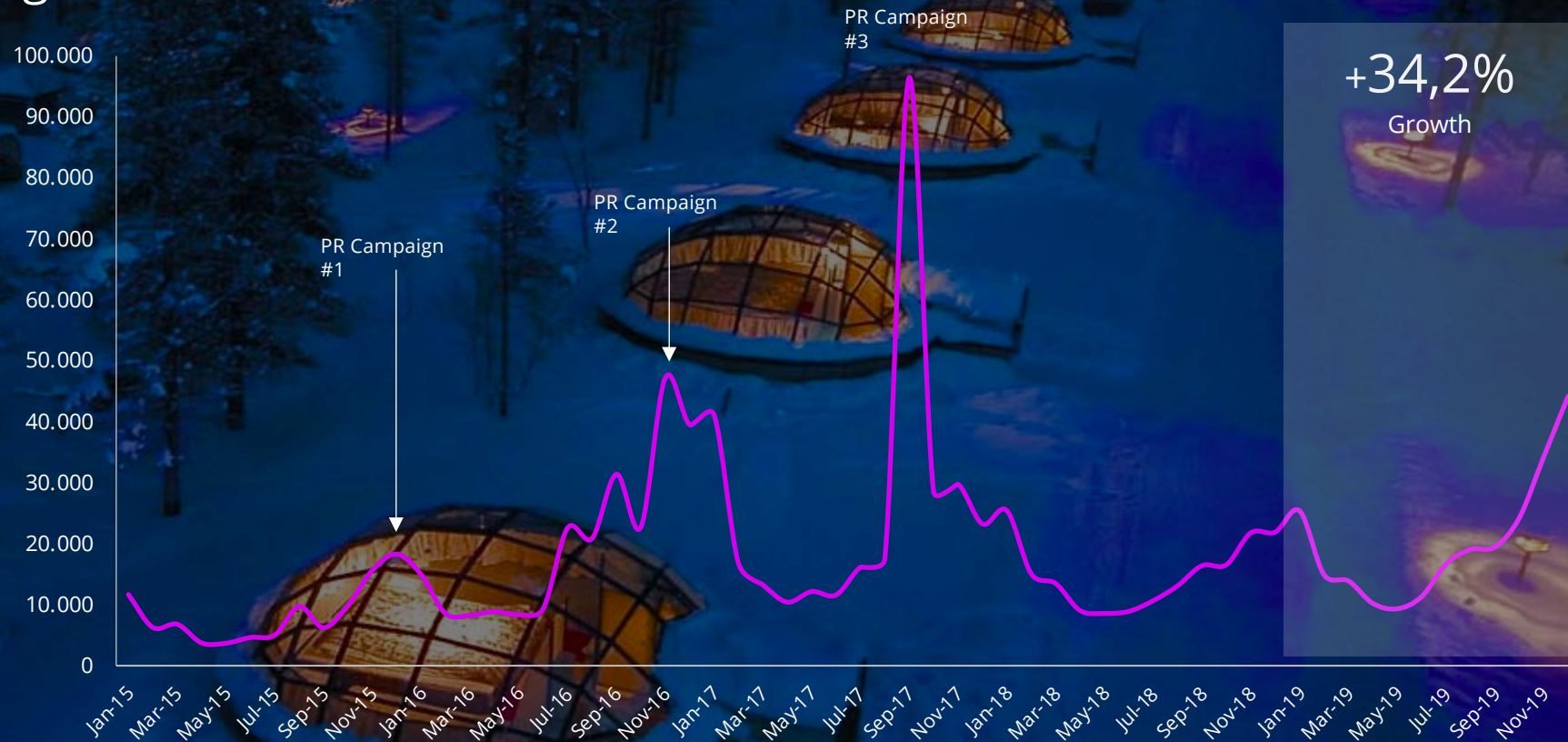
Igloos Ice Hotels Competitors Ranking



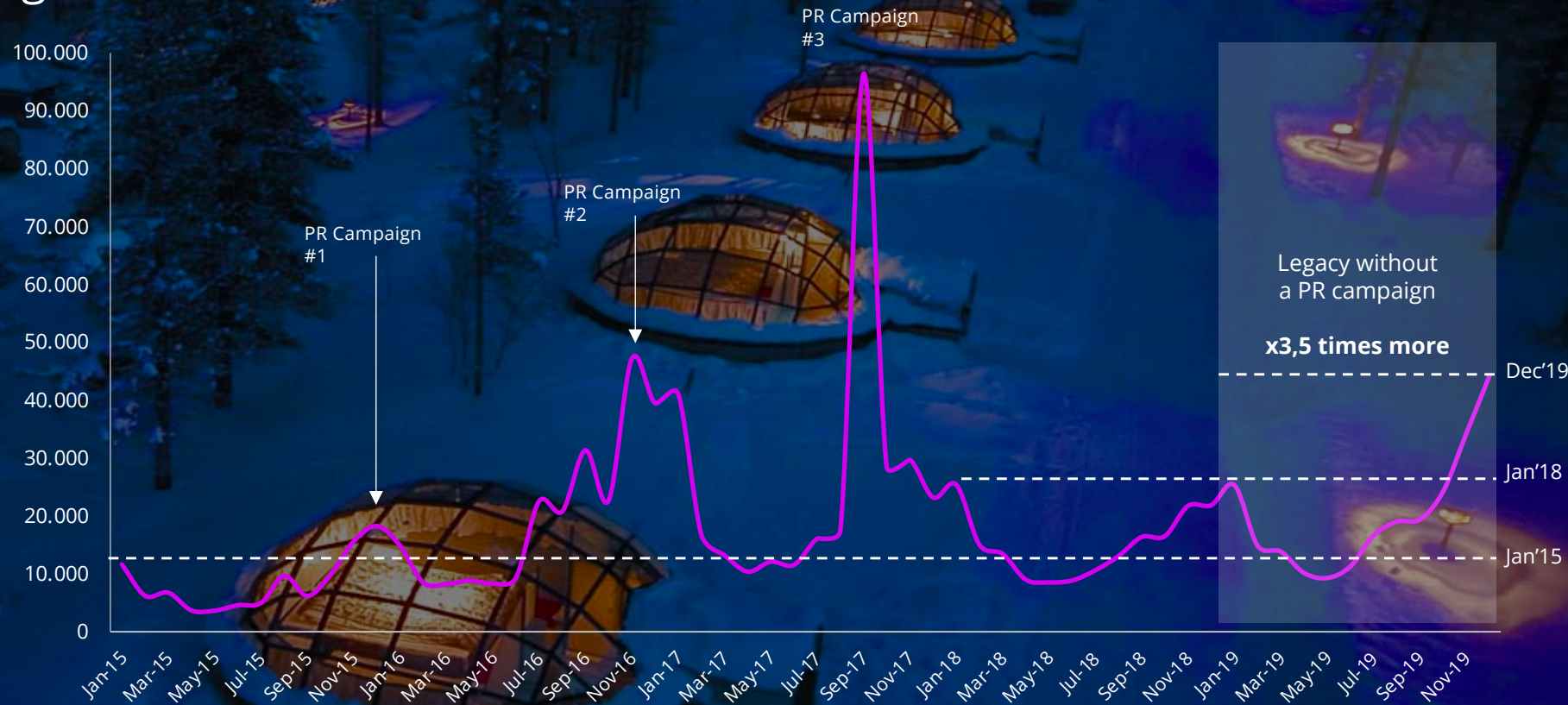
Igloos Ice Hotels



Igloos Ice Hotels



Igloos Ice Hotels



Igloos Hotels still is an important Micro-Brandtag

Top 12 Micro-Brandtags for Finland

2015	2016	2017	2018	2019
1. Travel	1. Igloos Ice Hotels	1. Igloos Ice Hotels	1. Northern Lights	1. Tourism
2. Saunas	2. Northern Lights	2. Northern Lights	2. Travel	2. Northern Lights
3. Tourism	3. Travel	3. Travel	3. Cities	3. Travel
4. Northern Lights	4. Saunas	4. Cities	4. Tourism	4. Saunas
5. Santa Claus	5. Tourism	5. Tourism	5. Saunas	5. Places to Visit
6. Cities	6. Cities	6. Saunas	6. Places to Visit	6. Igloos Ice Hotels
7. Igloos Ice Hotels	7. Santa Claus	7. Places to Visit	7. Igloos Ice Hotels	7. Cities
8. Holiday Packages	8. Holiday Packages	8. Santa Claus	8. Santa Claus	8. Santa Claus
9. Places to Visit	9. Places to Visit	9. Holiday Packages	9. Lakes	9. Holiday Packages
10. Lakes	10. Hotels	10. Hotels	10. Hotels	10. Hotels
11. Hotels	11. Lakes	11. Lakes	11. Holiday Packages	11. Lakes
12. Visit	12. Visit	12. Camping	12. Camping	12. Camping

Conclusions

1. Finland is the fastest growing country compared to other countries in the North.
2. Increase demand for the top brandtags, more than ever.
3. Finland is “on-brand” as it is growing in brandtags related to *Nature* and *Wellbeing*.

Other important and fast growing brandtags

Camping



Spa and Beauty



Islands



Parks and Reserves



Forests



Camping



Camping



Camping



Camping

Finland

#10 position (Brandtag)

153.405 searches 2019

+44,4% growth for Finland 2018-2019

Benchmark

+37,5% average growth of competitors 2018-2019

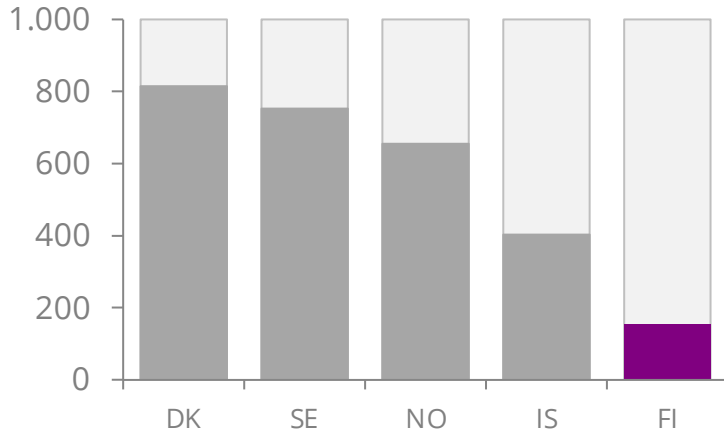


Camping – Benchmark Results



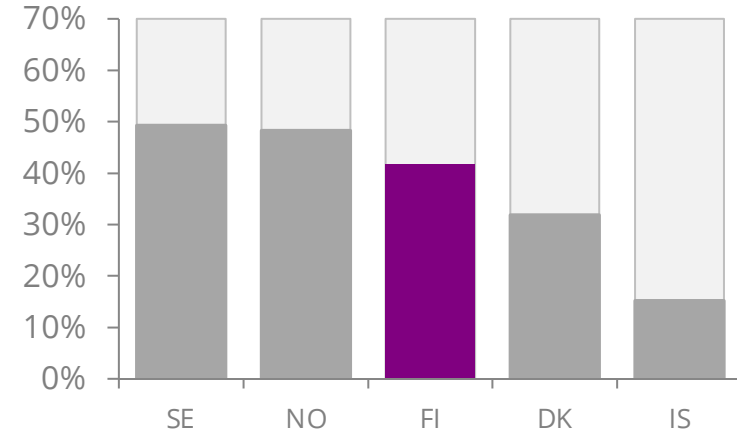
Benchmark searches results

Thousands



Benchmark searches growth 2018 – 2019

Percentage (%)



Camping is an important activity for all the countries



Finland

1. Natural Wonders
2. Tourism
3. Tourism Attractions
4. Destinations
5. Wellbeing
6. Travel
7. Tourism Packages
8. Special Acc.
9. Santa
10. **Camping**
11. Hotels
12. Winter Sports
13. Tours
14. Ski Accommodation
15. Rural Accommodation



Iceland

1. Natural Wonders
2. Tourism
3. Tourism Packages
4. Travel
5. Tourism Attractions
6. Tours
7. Hotels
8. Destinations
9. **Camping**
10. Wellbeing
11. Adventure & Outdoor
12. Hiking
13. Museums
14. Resorts
15. Shopping



Norway

1. Natural Wonders
2. Tourism
3. Tourism Attractions
4. Tourism Packages
5. Travel
6. **Camping**
7. Destinations
8. Cruises
9. Tours
10. Winter Sports
11. Fishing
12. Hiking
13. Holiday Acc.
14. Hotels
15. Adventure & Outdoor



Denmark

1. Holiday Acc.
2. **Camping**
3. Tourism Packages
4. Tourism Attractions
5. Destinations
6. Tourism
7. Travel
8. Tours
9. Restaurants
10. Couples
11. Beaches
12. Entertainment Parks
13. Hotels
14. Natural Wonders
15. Historical Sites



Sweden

1. **Camping**
2. Destinations
3. Tourism Packages
4. Holiday Acc.
5. Tourism Attractions
6. Natural Wonders
7. Tourism
8. Special Acc.
9. Travel
10. Winter Sports
11. Urban Landmarks
12. Adventure and Outdoor
13. Wellbeing
14. Hotels
15. Rural Accommodation

Parks and Reserves



Parks and Reserves

Finland
#23 position (Brandtag)
36.417 searches 2019
+40,4% growth

Benchmark
+33,2% average growth of competitors

Parks and Reserves

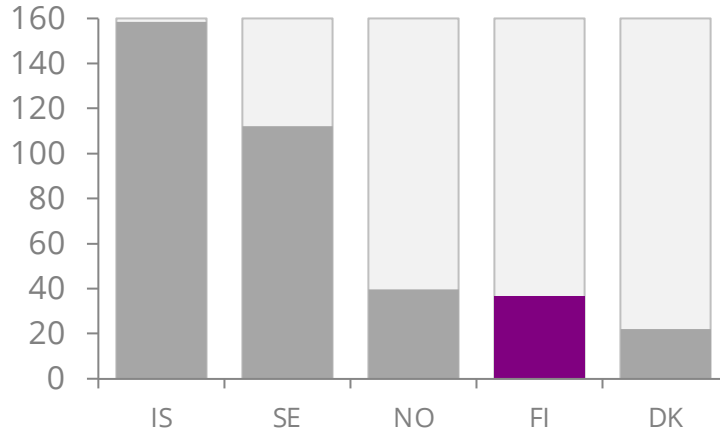


Parks and Reserves comparison



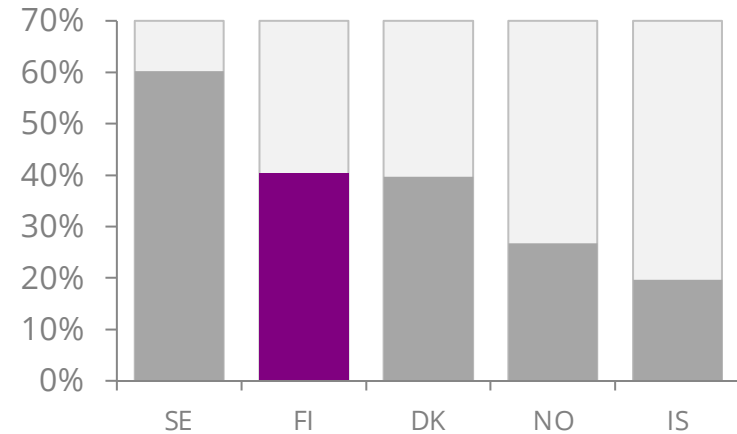
Benchmark searches results

Thousand



Benchmark searches growth 2018 - 2019

Percentage (%)



Forests



Forests

Finland

#17 position (Micro-Brandtag)

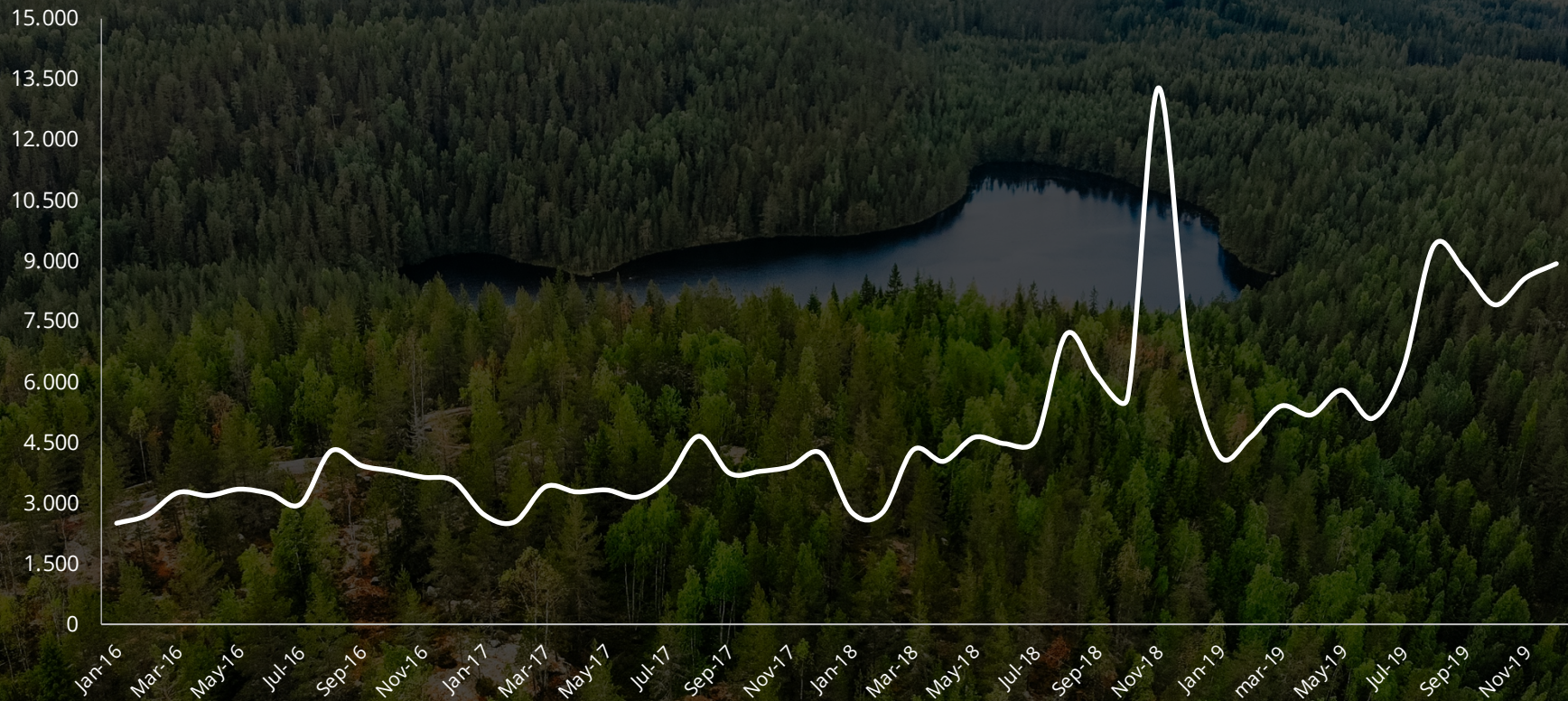
80.112 searches 2019

+20,7% growth

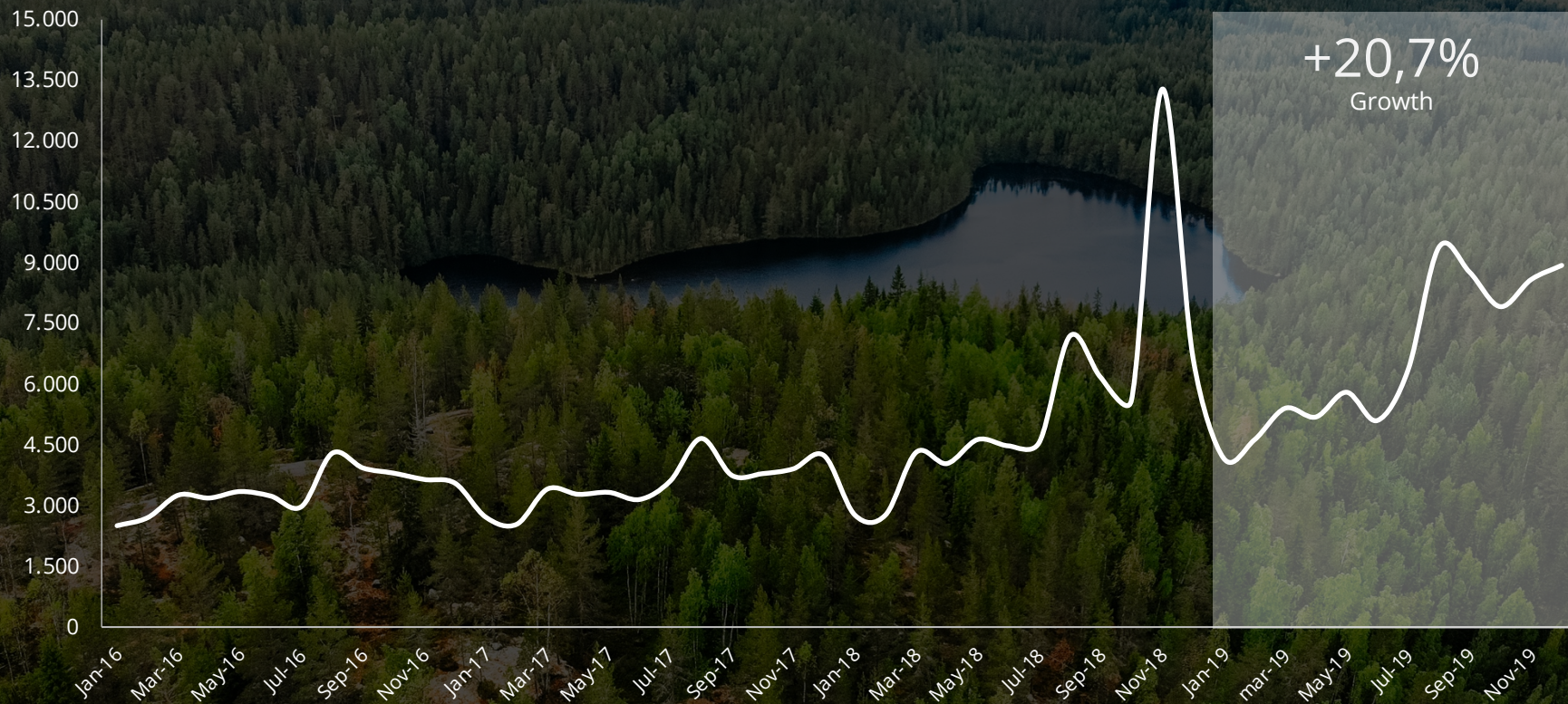
Benchmark

+29,2% average growth of competitors

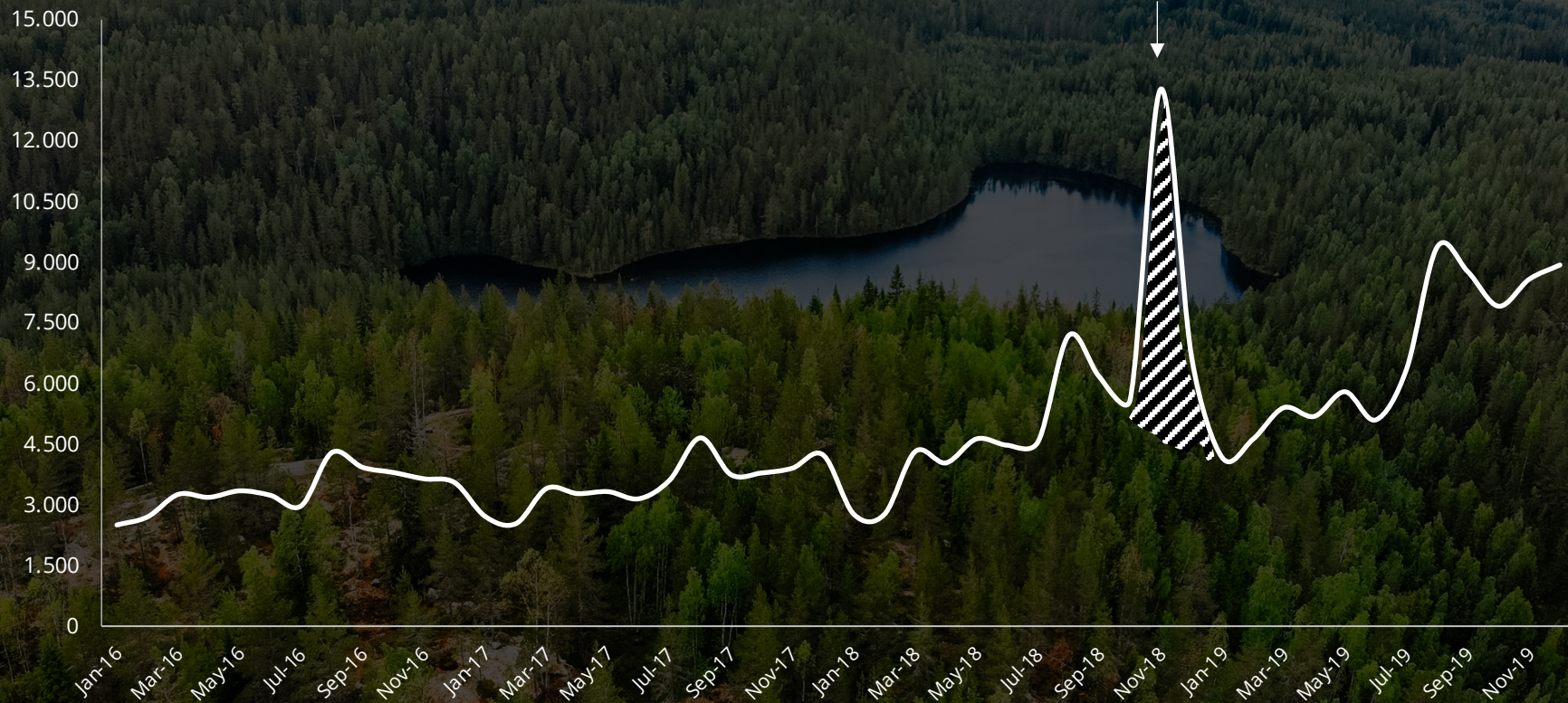
Forests



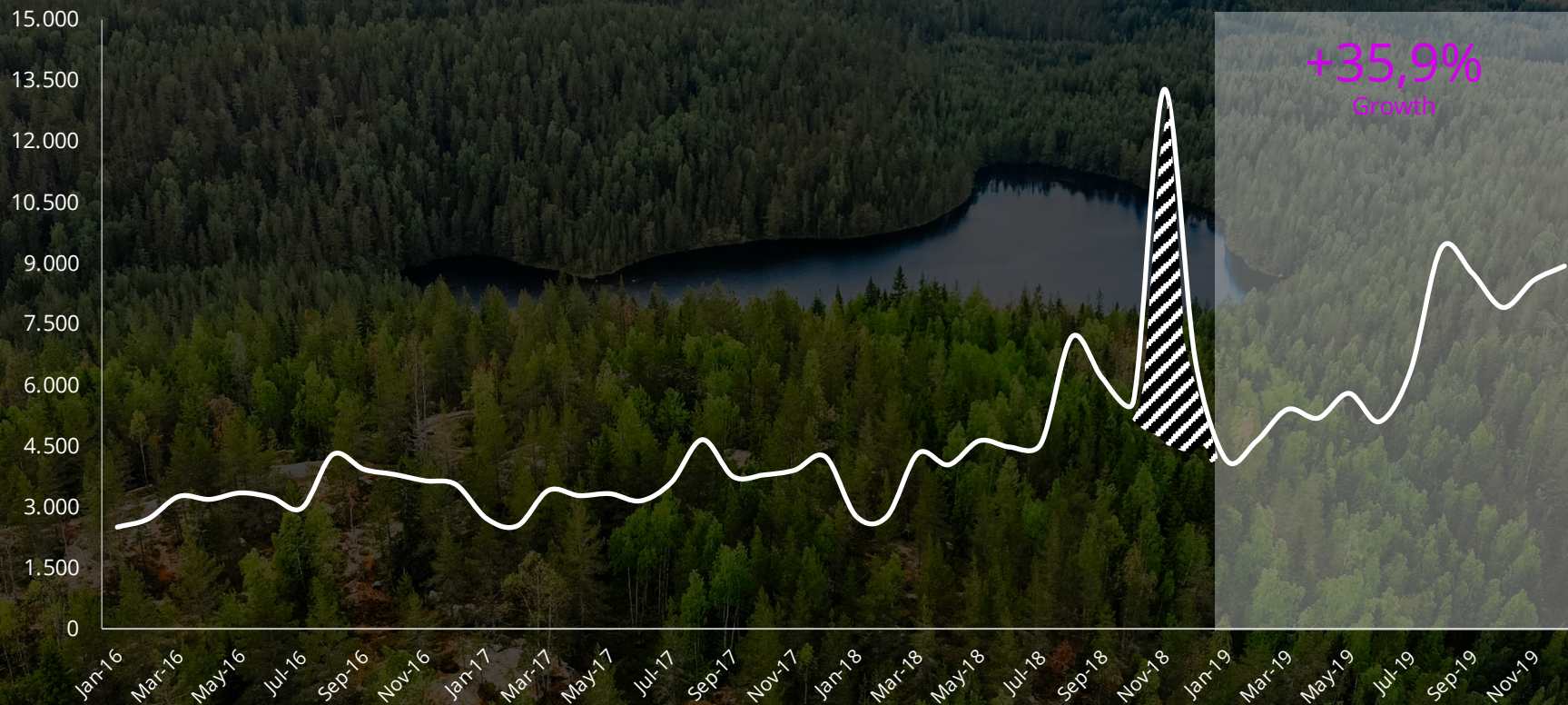
Forests



Forests



Forests

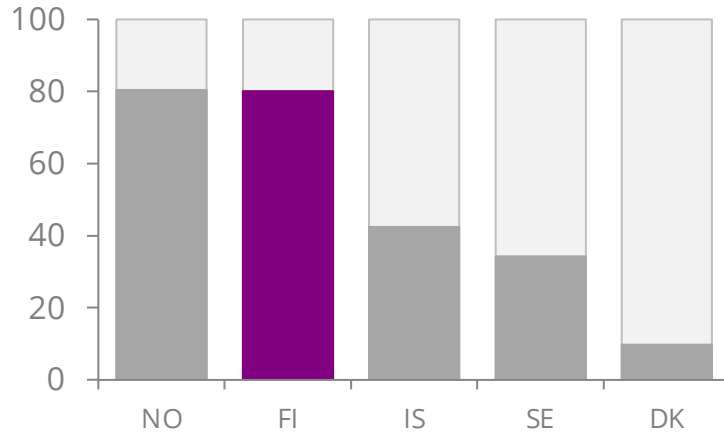


Forests – Benchmark Results



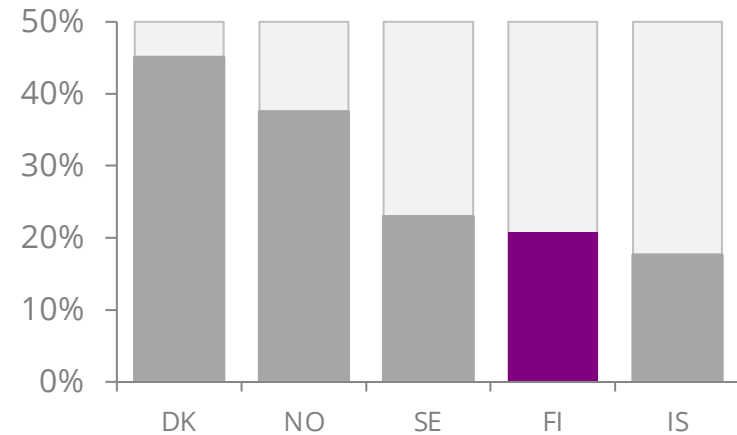
Benchmark searches results

Thousands



Benchmark searches growth 2018 – 2019

Percentage (%)



Islands



Islands

Finland

#26 position (Micro-Brandtag)

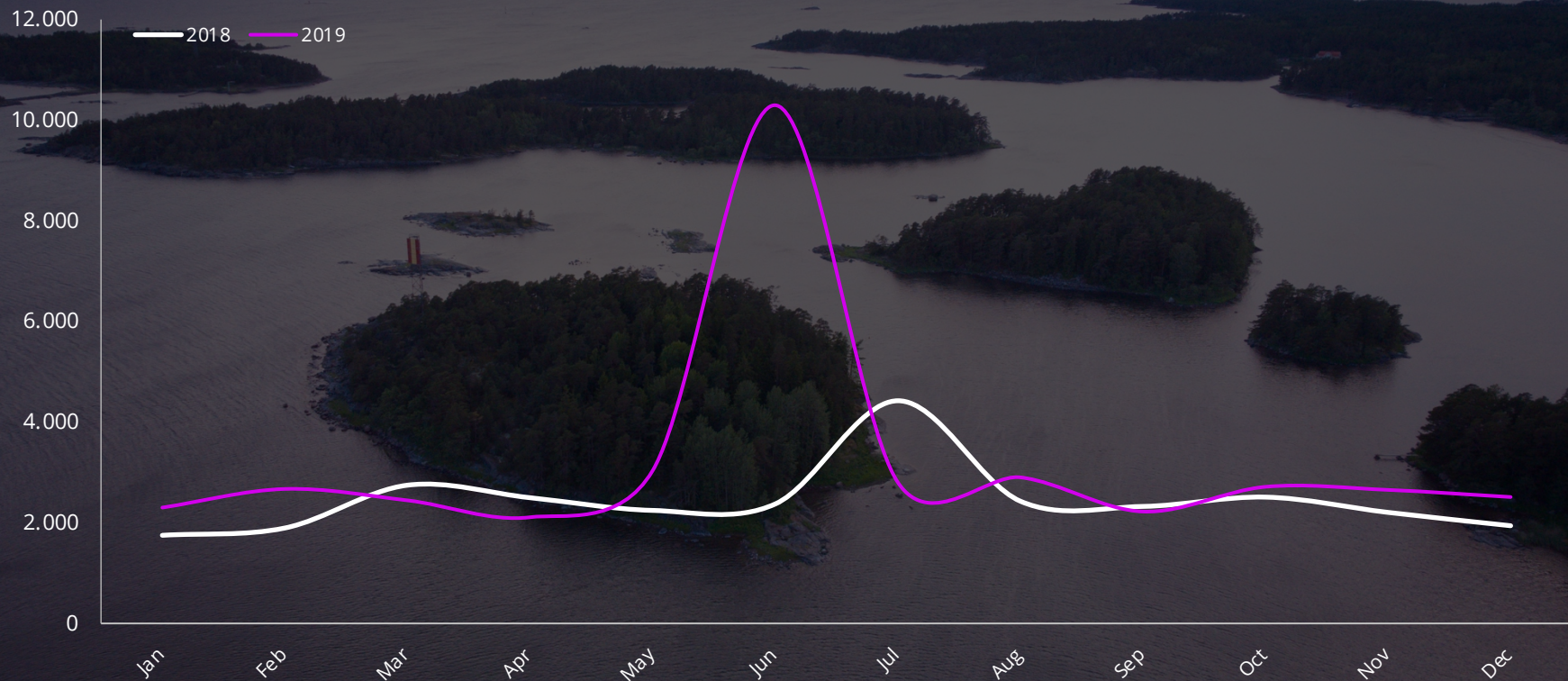
38.613 searches 2019

+31,7% growth

Benchmark

+21,9% average growth of competitors

Islands

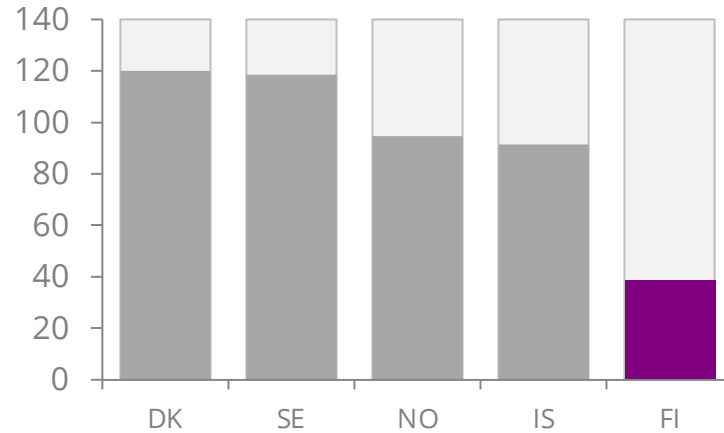


Islands comparison



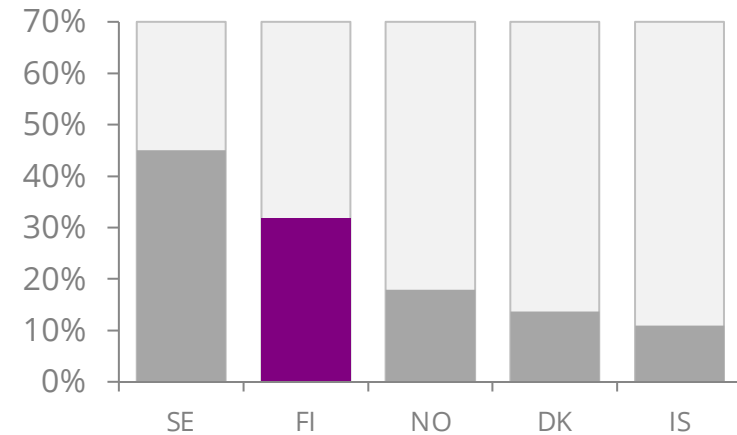
Benchmark searches results

Thousands



Benchmark searches growth 2018- 2019

Percentage (%)



Lakes



Lakes

Finland

#11 position (Micro-Brandtag)

128.529 searches 2019

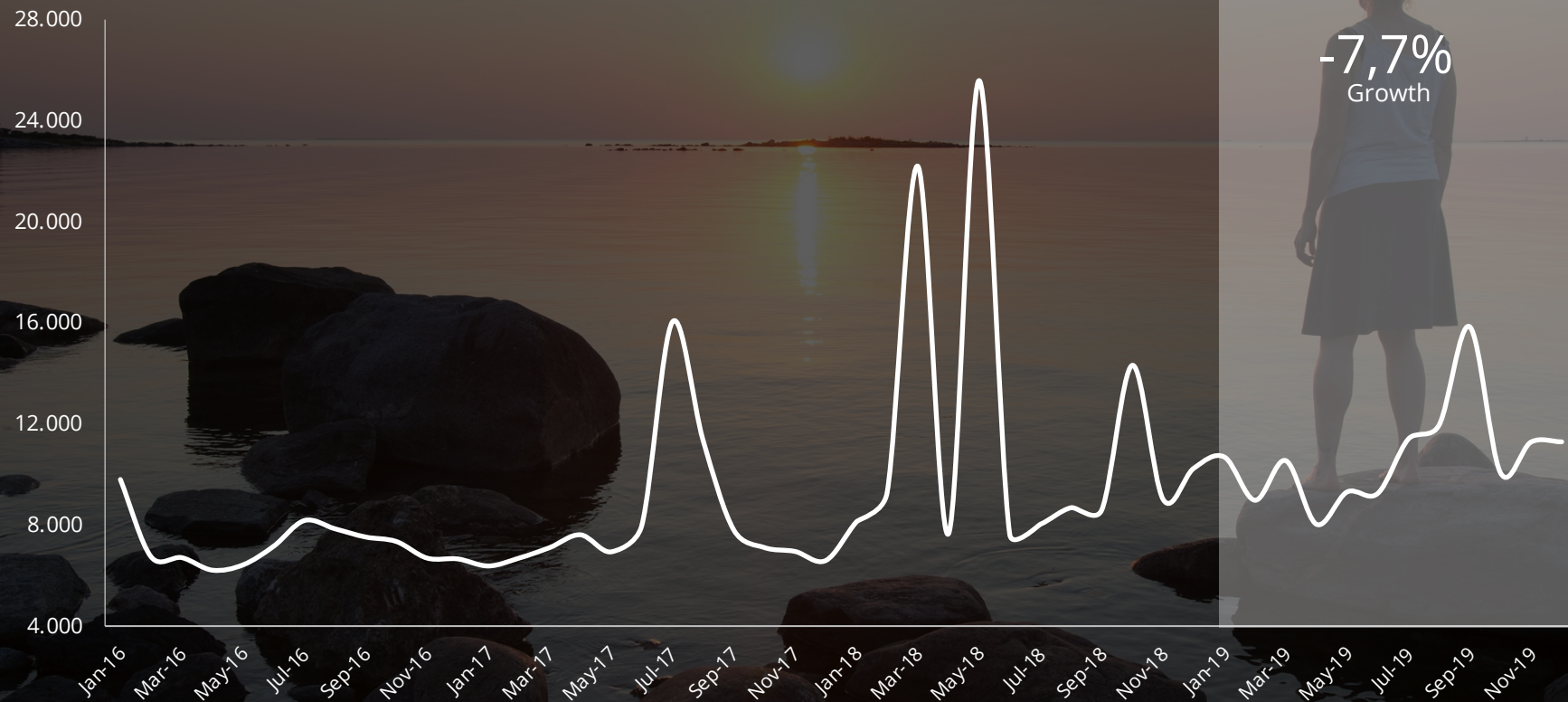
-7,7% growth

Benchmark

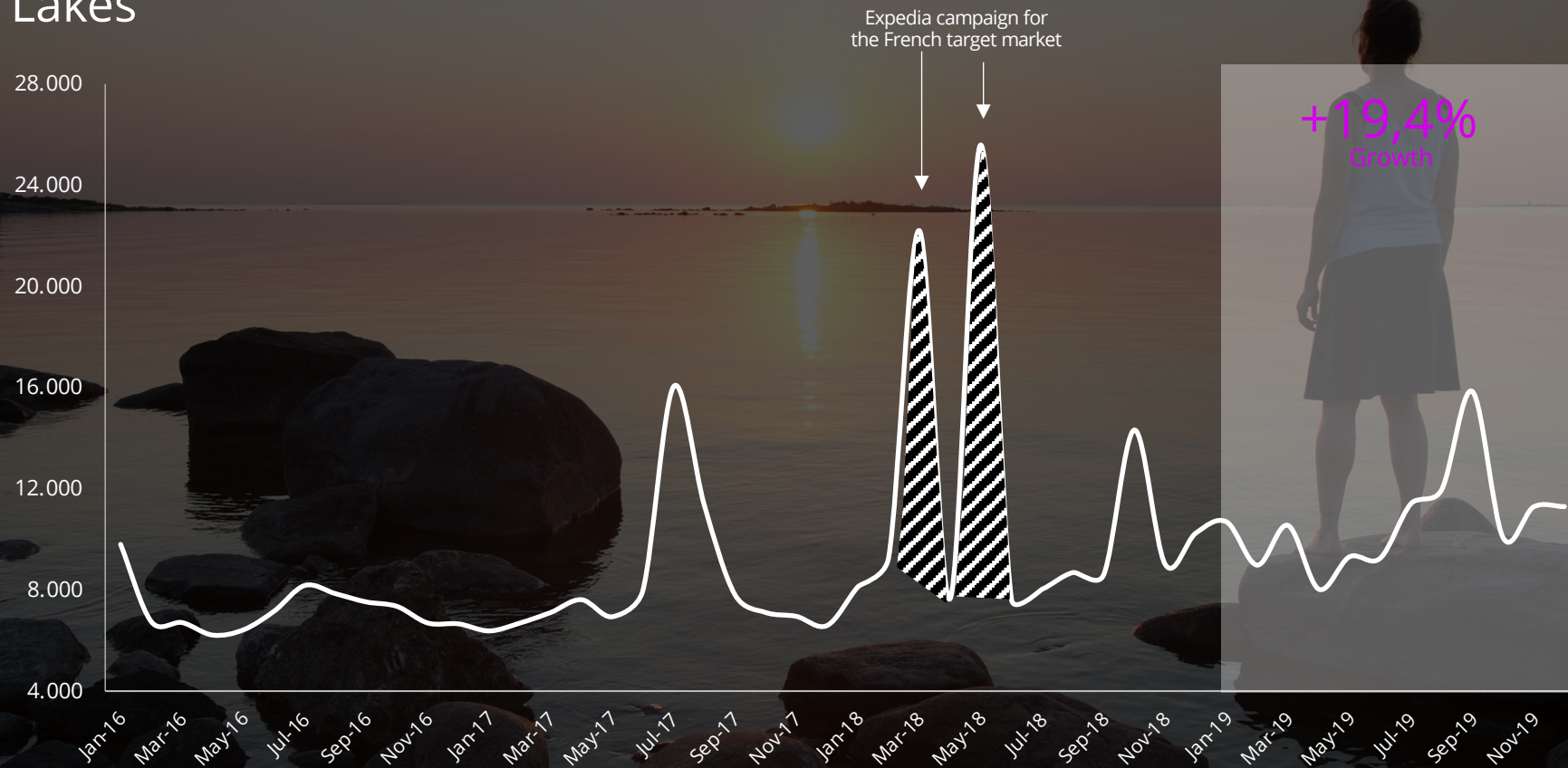
+25,2% average growth of competitors



Lakes



Lakes

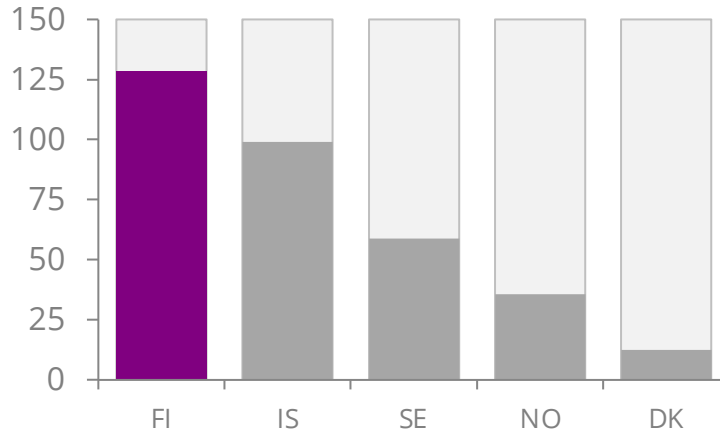


Lakes – Benchmark Results



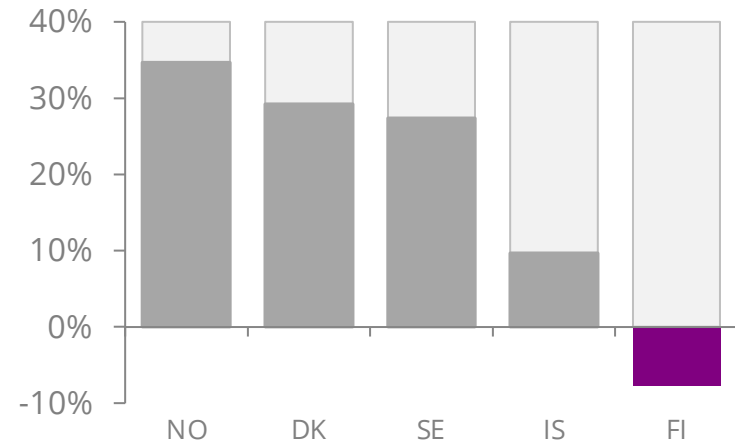
Benchmark searches results

Thousands



Benchmark searches growth 2018 – 2019

Percentage (%)



Conclusions

1. Finland is the fastest growing country compared to other countries in the North.
2. Increase demand for the top brandtags, more than ever.
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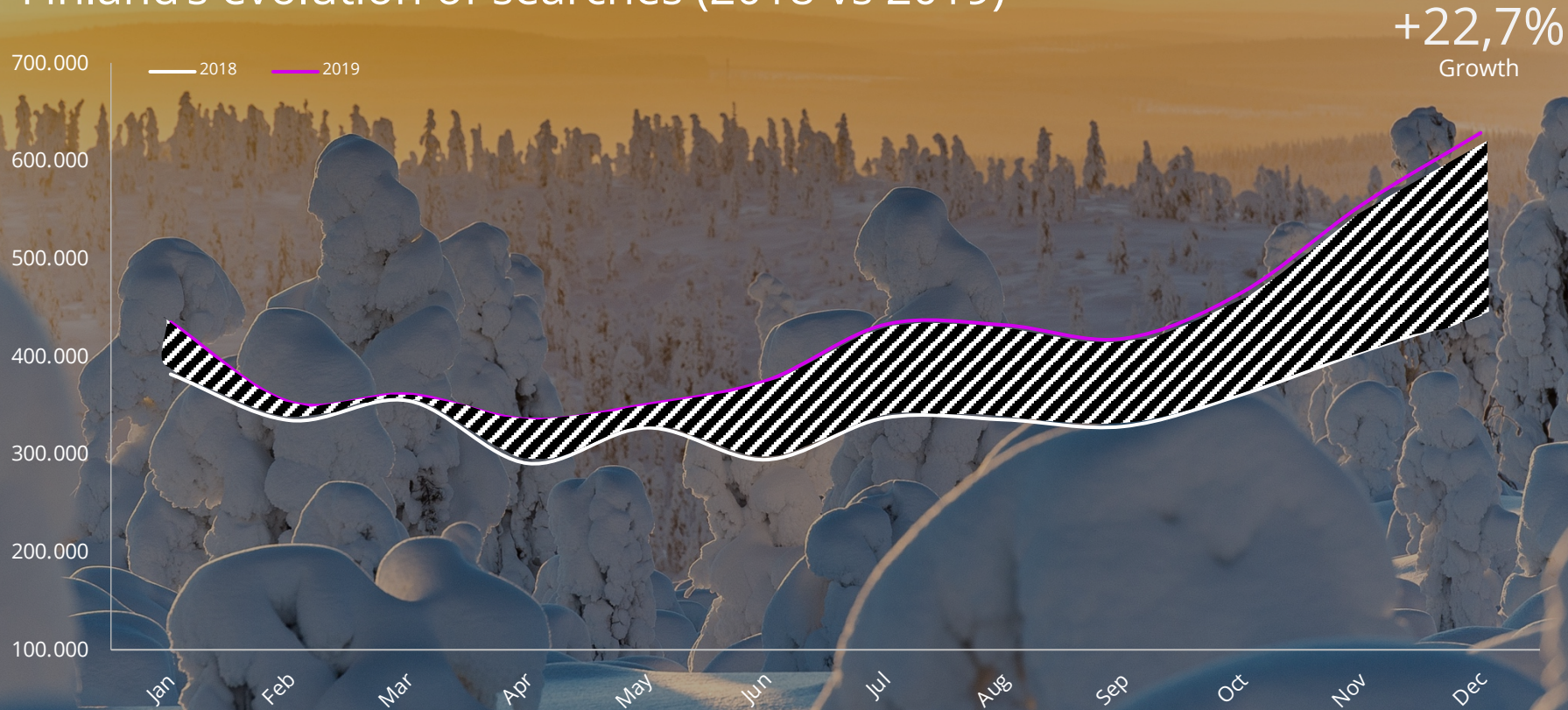
Finland's evolution of searches (2016-2019)



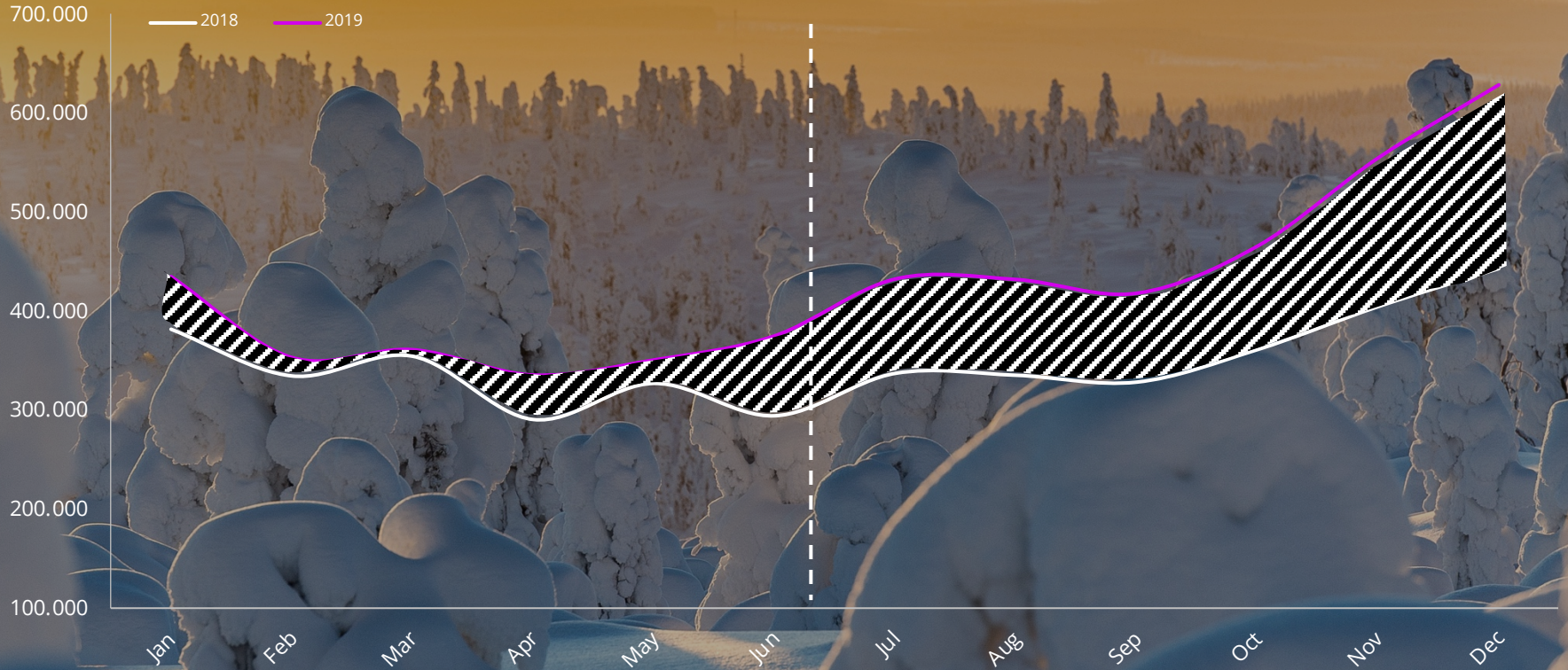
Finland's evolution of searches (2018 vs 2019)



Finland's evolution of searches (2018 vs 2019)



Finland's has two speeds when looking at the growth rate



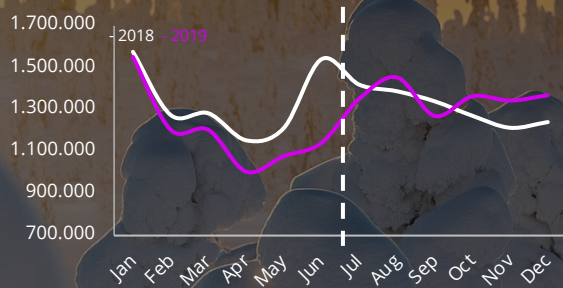
Growing a lot more in the second half of the year than in the first



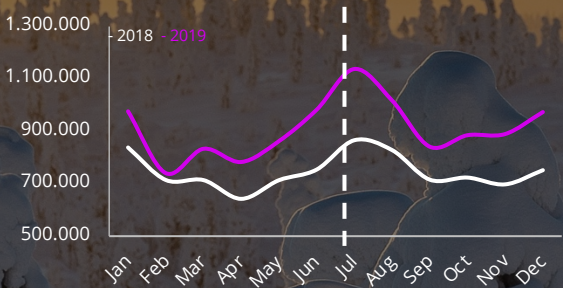
Finland is the only country in the benchmark with this behaviour



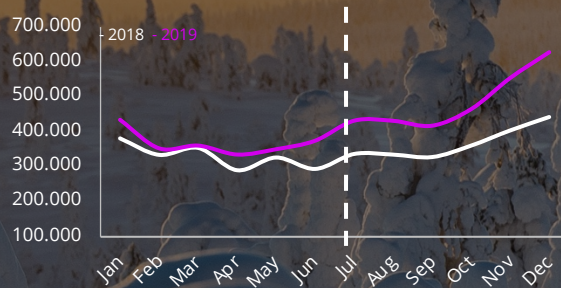
Iceland



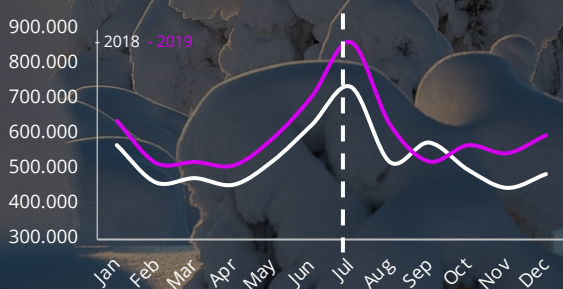
Norway



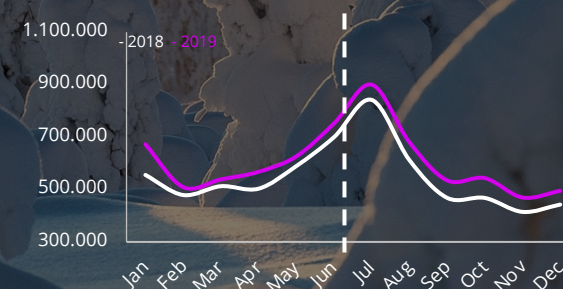
Finland



Sweden



Denmark





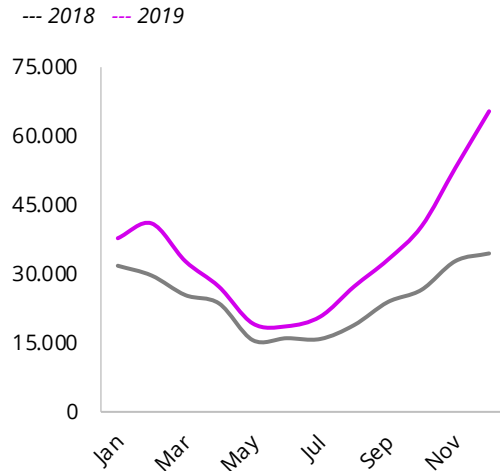


Reason 1

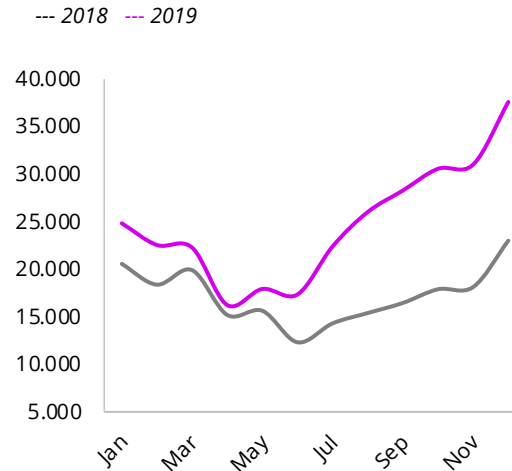
Finland's top brandtags grow more during the second part of the year

Finland's top brandtags have more searches in the second part of the year

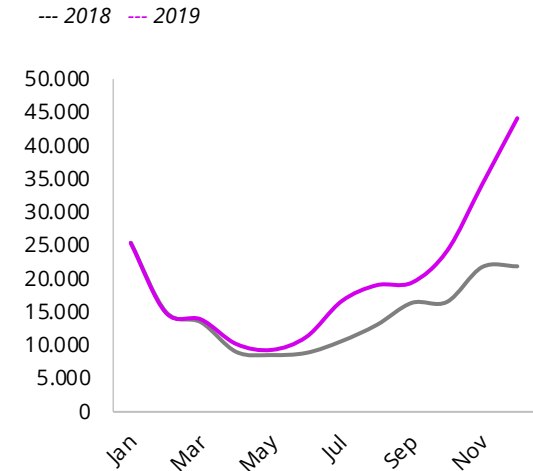
Northern Lights



Saunas



Igloo Ice Hotels





Reason 2

Japan experiences an extraordinary growth

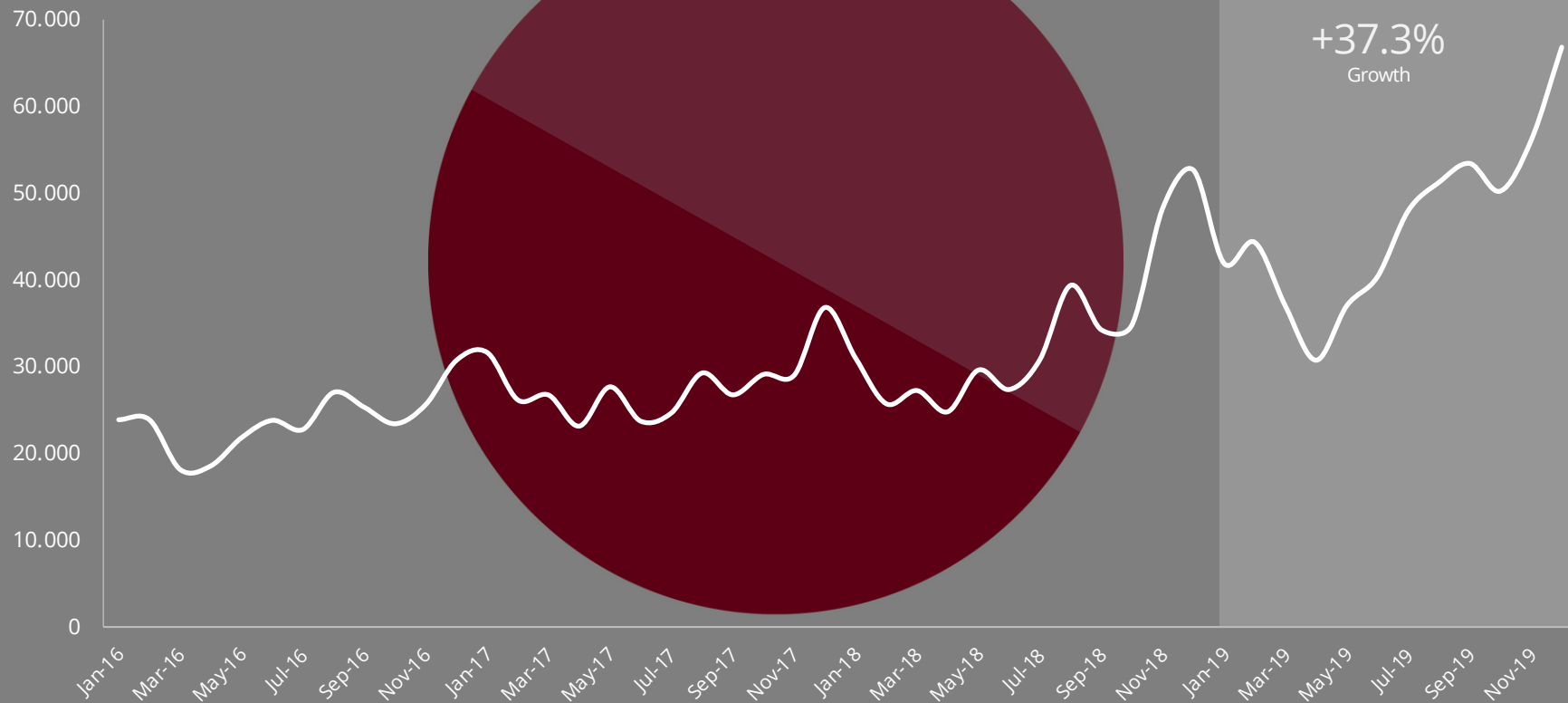
Top target markets for Finland by volume of searches

Flags	Markets	2019	Growth
	Japan	556.756	+37,3%
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	Germany	455.265	+37,9%
	United States	402.123	+20,4%
	United Kingdom	353.340	+39,1%
	China	317.465	-16,3%
	France	248.971	+20,9%
	Italy	223.324	+21,9%
	Spain	205.899	+21,7%
	India	157.504	+33,4%
	Rest of the world	1.694.428	+24,7%

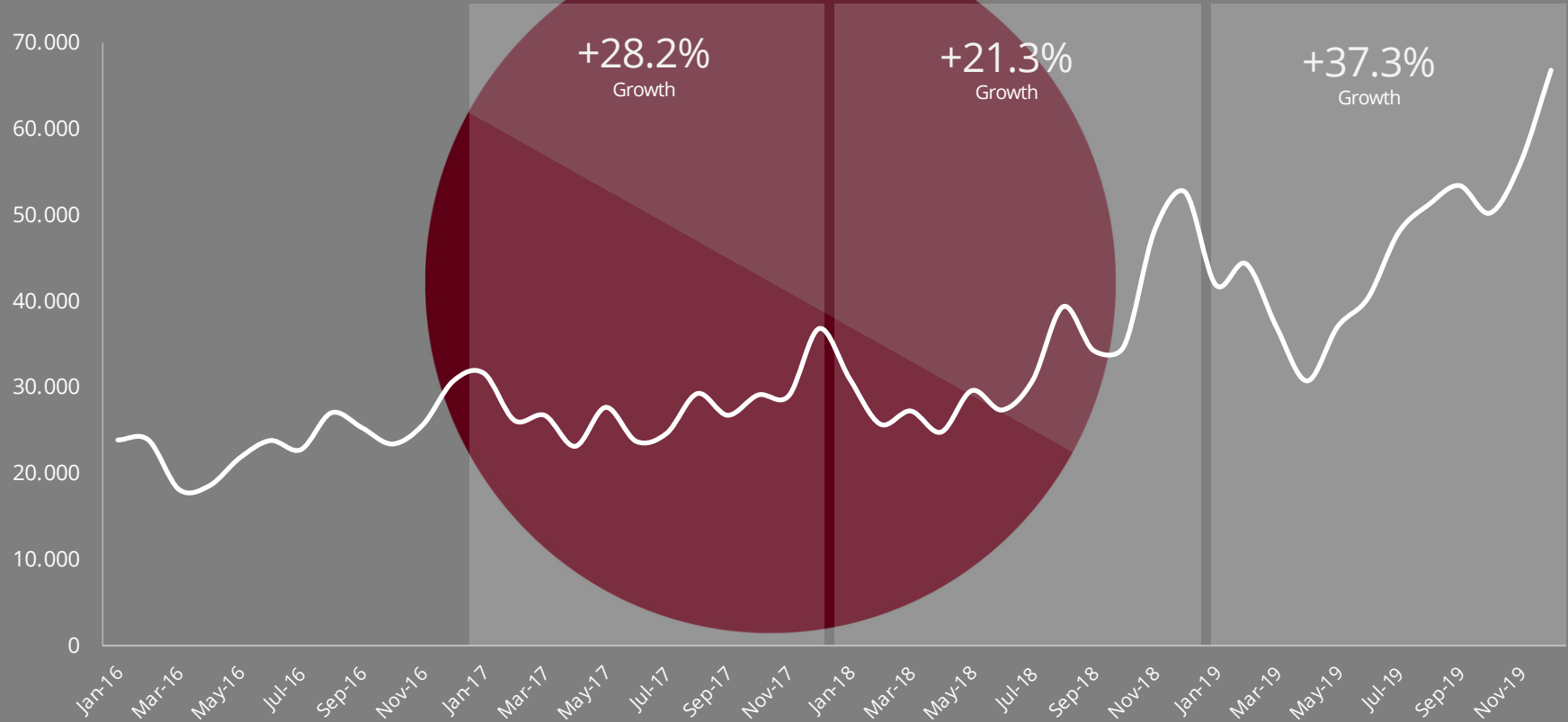
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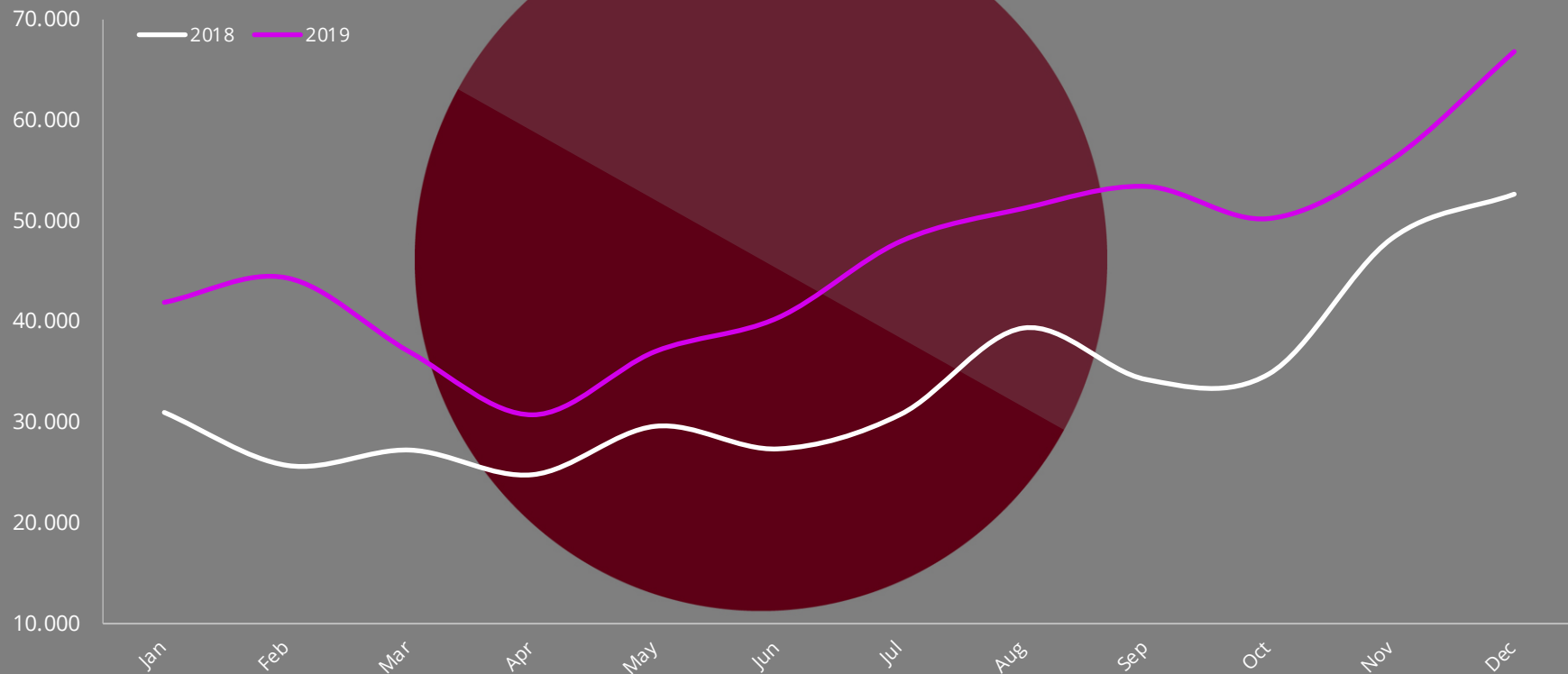
Evolution of searches of the Japanese target market



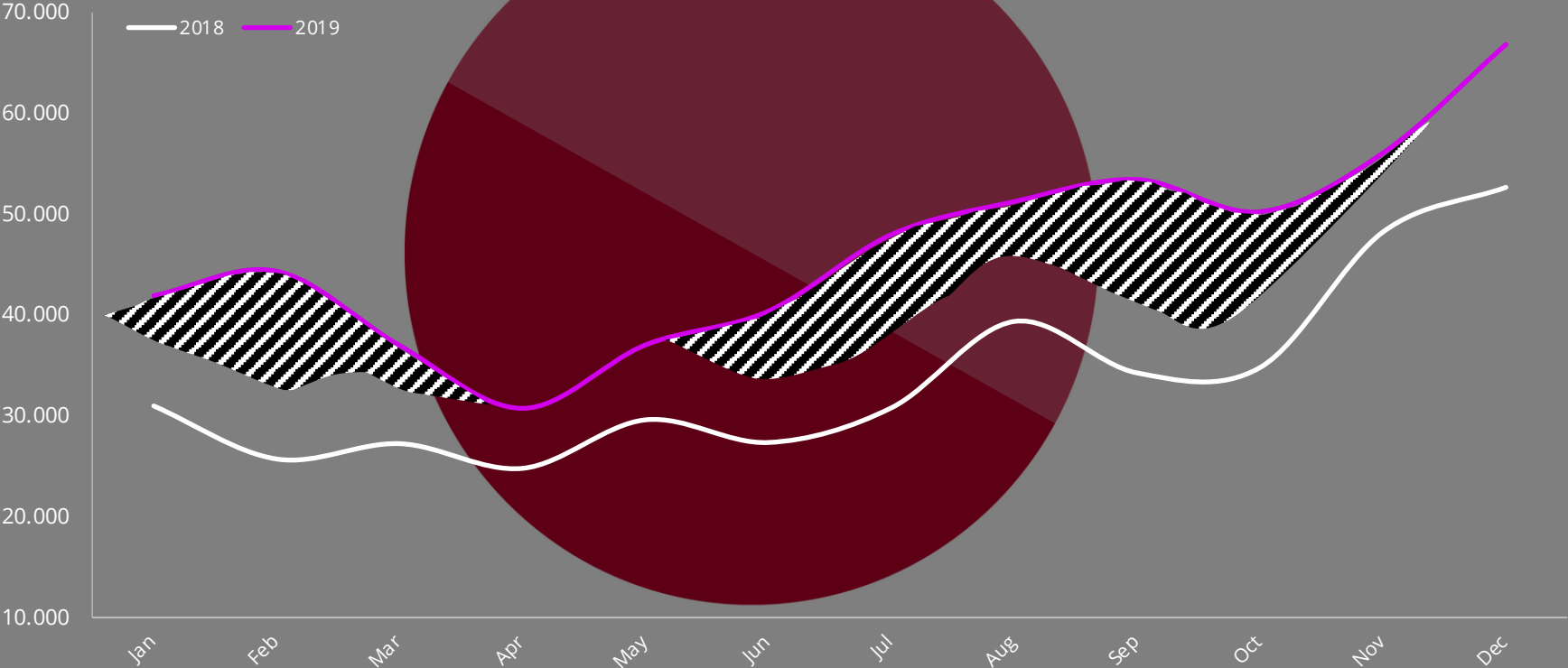
Evolution of searches of the Japanese target market



Japan



Japan





100

FINLAND JAPAN

フィンランド 日本 2019

Life Money

says that there is no water bath in Sauna's home country "Finland"

Posted on: Aug 11, 2019 16:00

東洋経済

TOYOKEIZAI

ONLINE

Sauna gathering! Japan's largest sauna festival held in Nagano

2019/08/12 TABI LABO editorial department



The boom is sparked by manga artist Katsuki Tanaka.



9.23 (MON) 10:00-

The Finnish "World's Best Happiness"

How richness and forgiveness are nurtured

SAUNA
FES 2019
VOL.04
JAPAN

FINLAND VILLAGE

9.21 | 9.22 | 9.23

SAT 10:00-18:00 SUN 10:00-18:00 MON 10:00-17:00

WWW.SAUNAFESJAPAN.COM



2019.2.7

Aurora appreciation in Northern Europe Finland! -Tips for enjoying a photography trip
Photographer Kakita Miho x Scandinavian Travel Fin Tour Tetsuya Miwa



In search of the Northern Lights of Finland

Commemorating the release of the best love story movie "Yuki no Hana"

Feel All The Feels This Love Month With The Movie Snow Flower



✚ Happiness ranking No.1 country with red aurora and Finland! Be happy when you watch the movie "Snow Flower"! ?



News & Report Editor

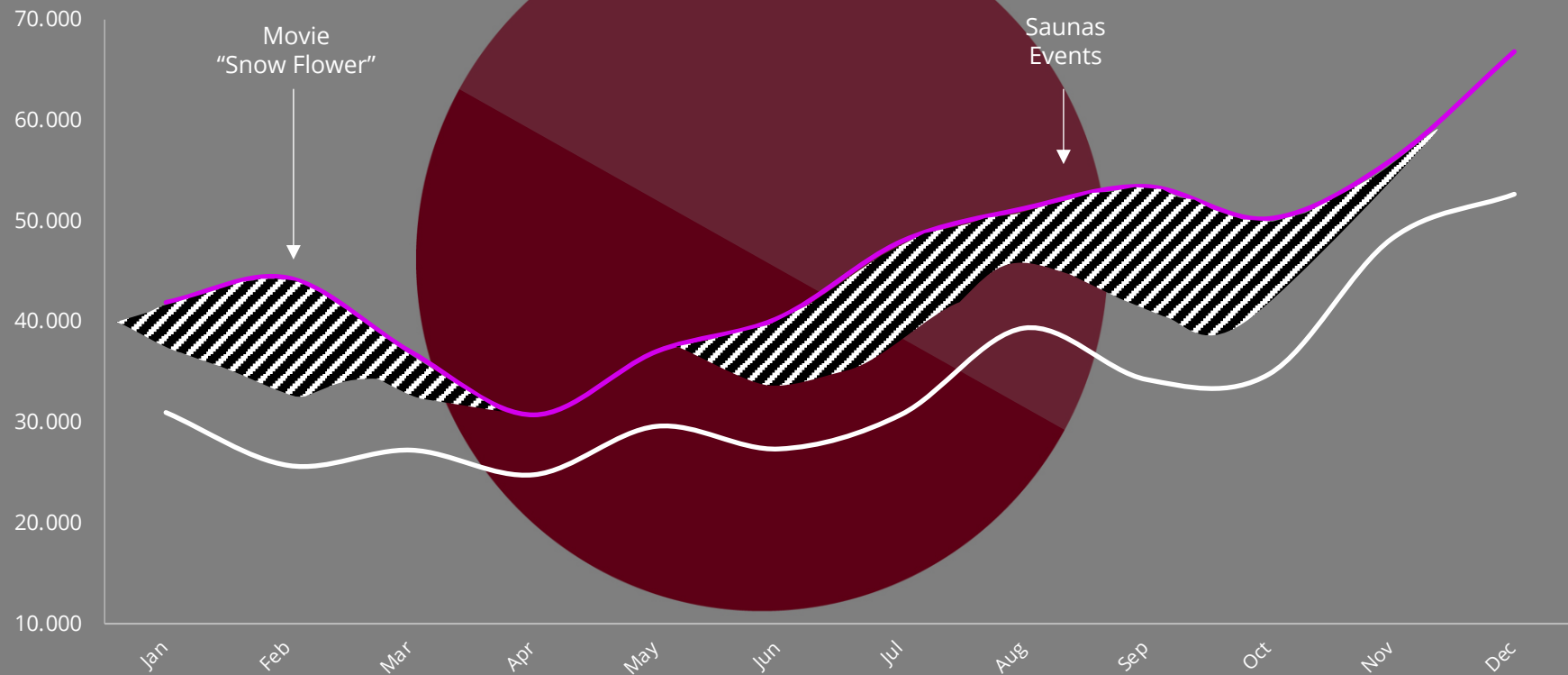
🕒 February 04, 2019



tripnote

THE HISTORIC GLO HOTEL ART AS ONE OF THE
FILMING LOCATIONS OF THE JAPANESE SNOW
FLOWER MOVIE

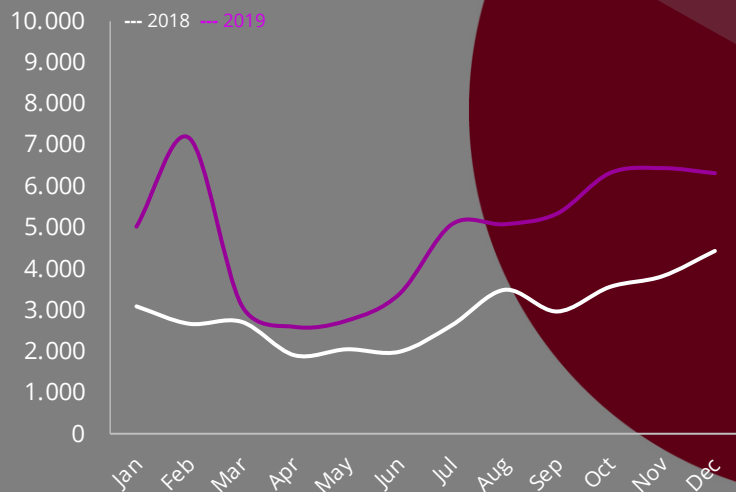
Japan



Japan

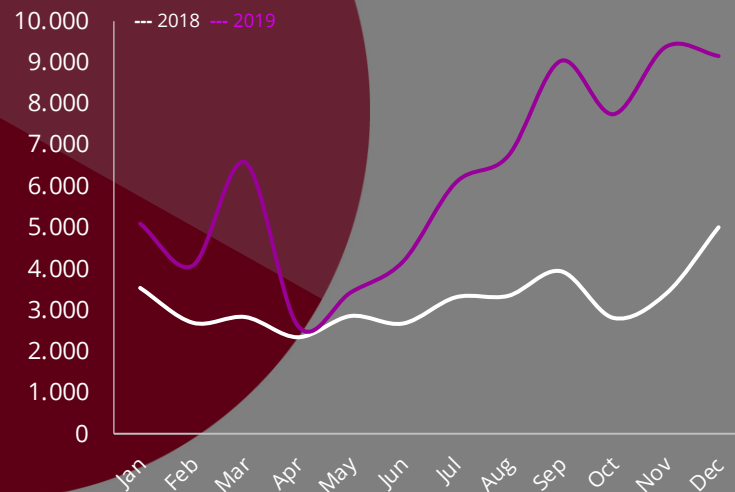
Northern Lights

growth = +66,0%



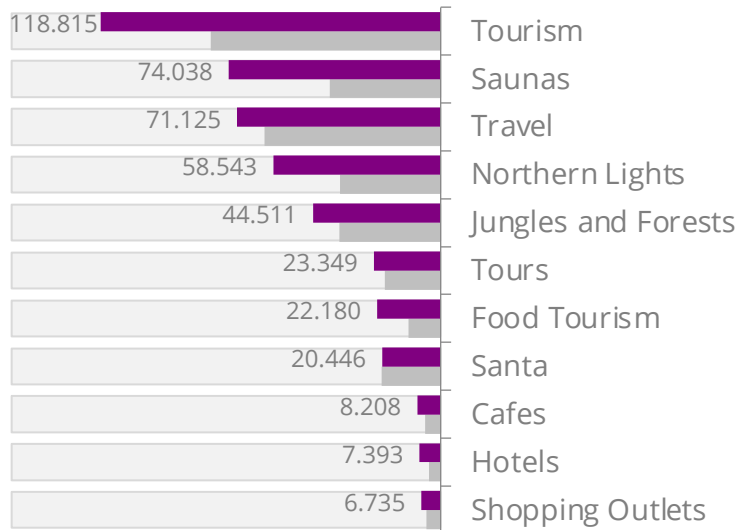
Saunas

growth = +91,4%

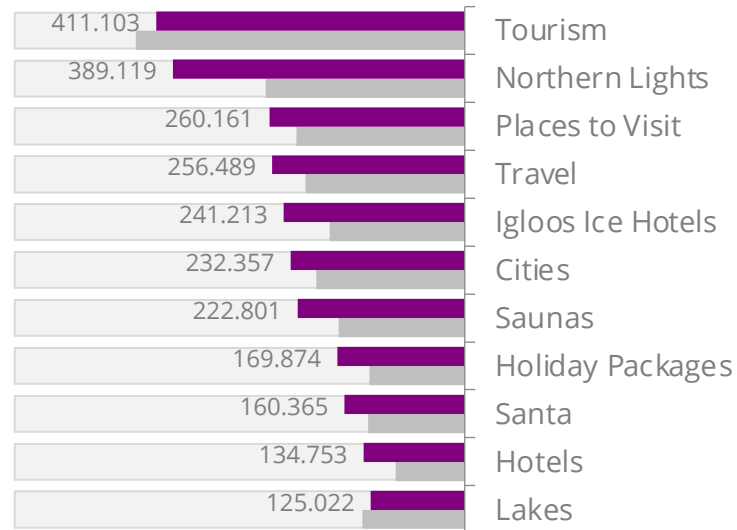


Touristic offer appealing for Japan and the Rest of the Word

 Japan



 Rest of the markets





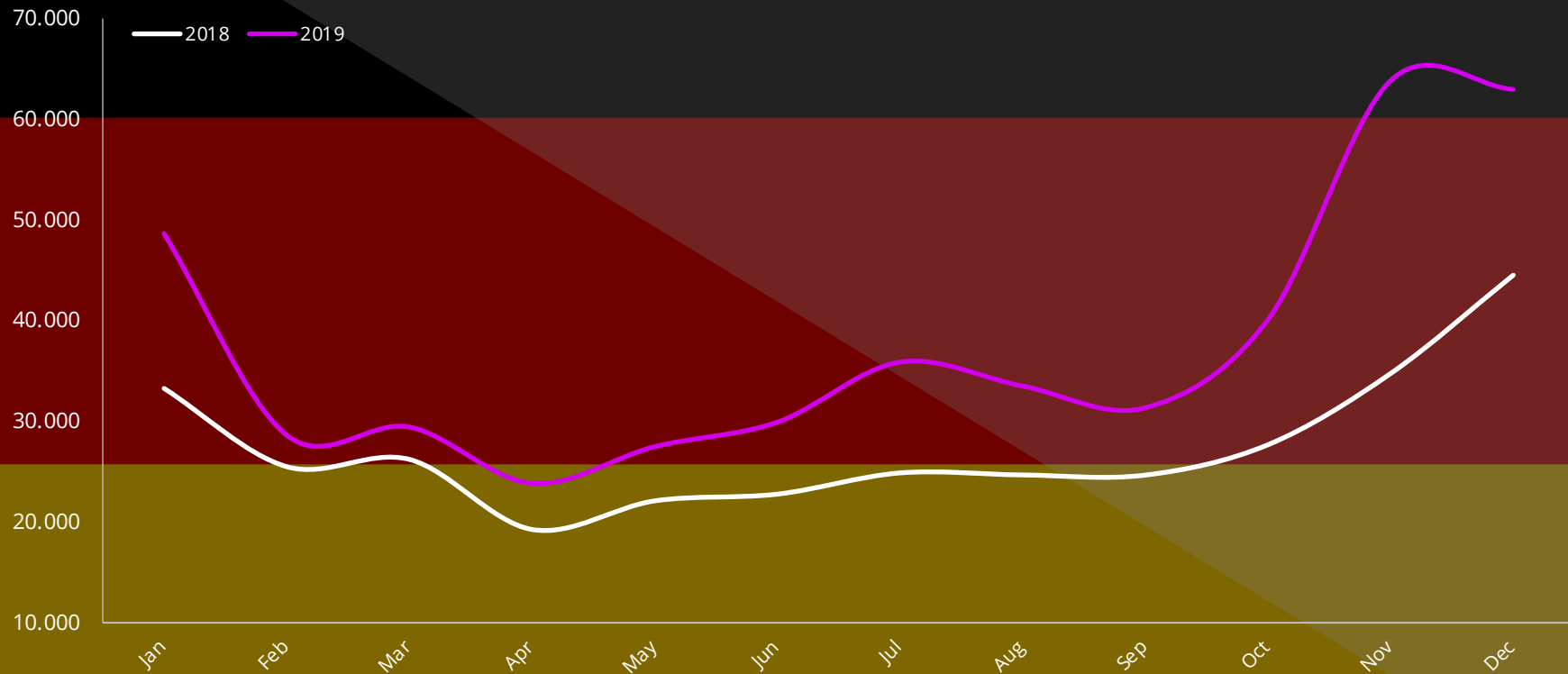
Reason 3

Germany and United Kingdom's appeal increases, in particular for *Packages* and *Northern Lights*,

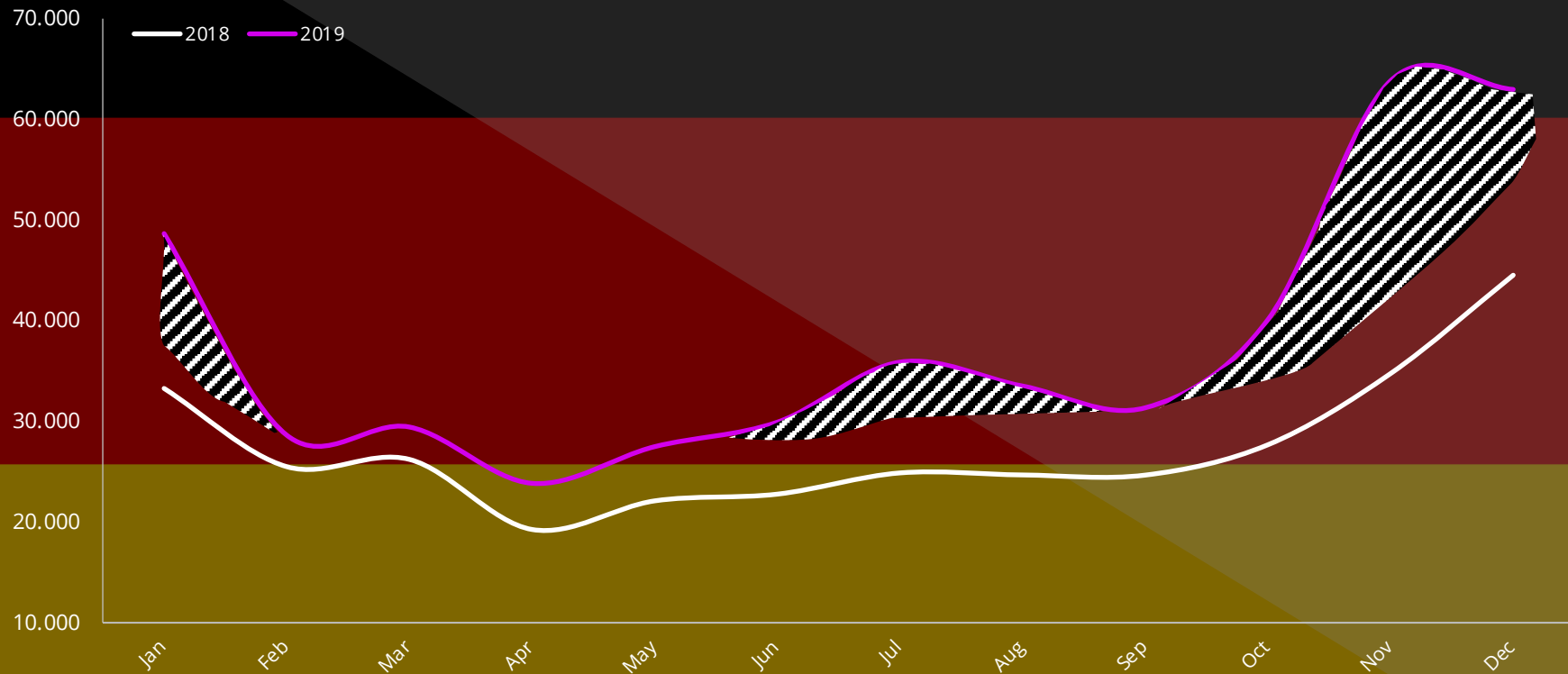
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Germany

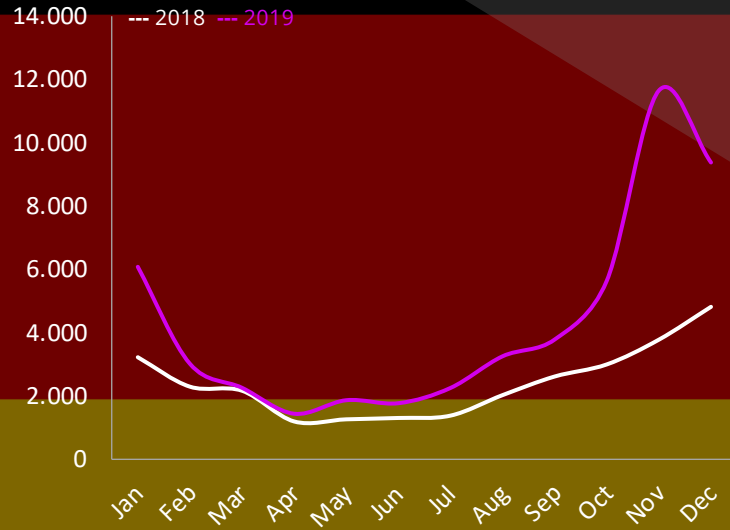


Germany

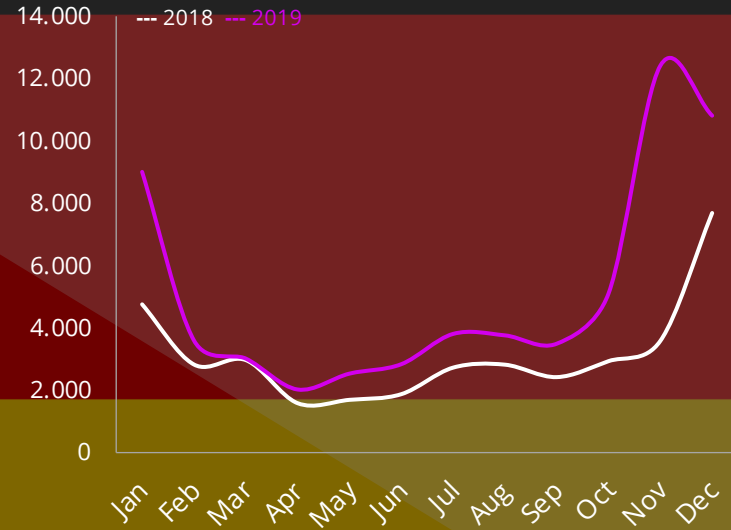


The peaks are visible in the various of topics

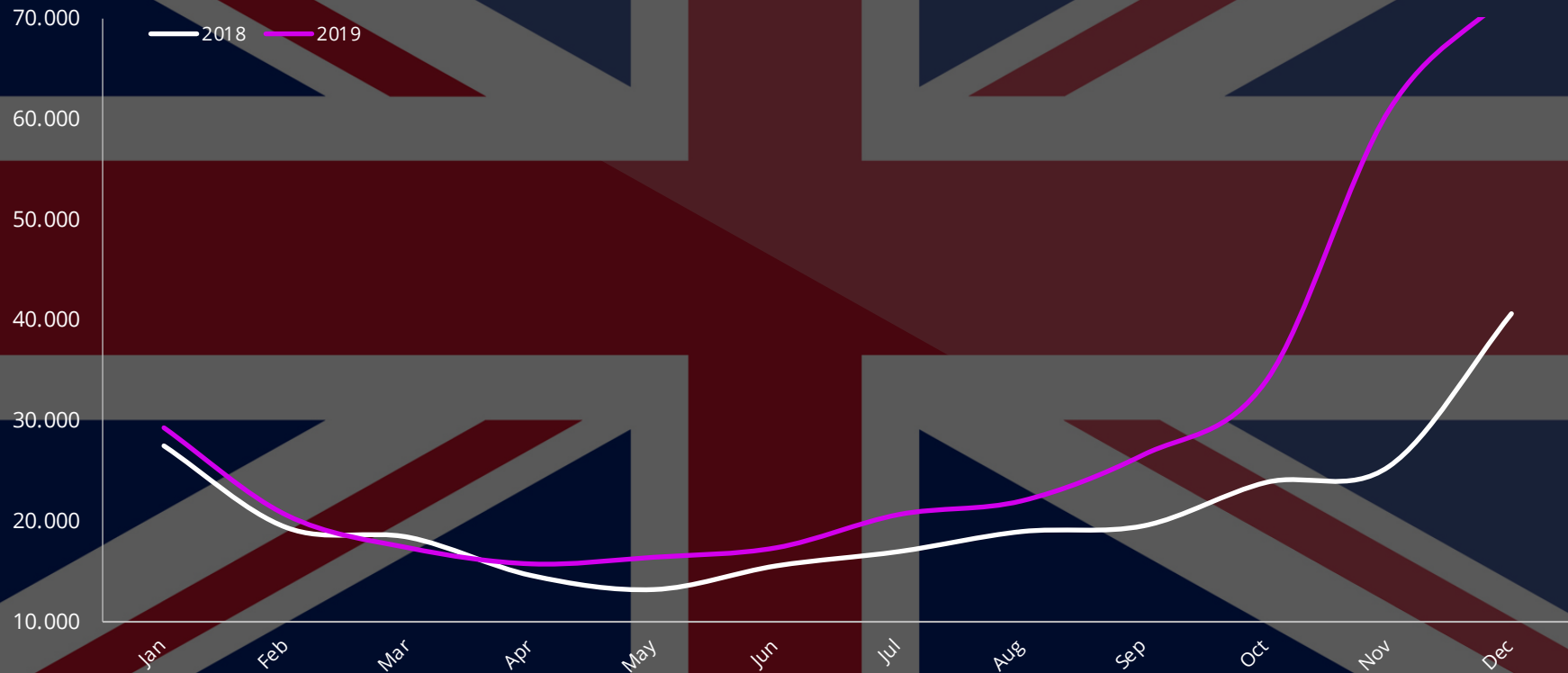
Northern Lights



Vacation Packages



United Kingdom

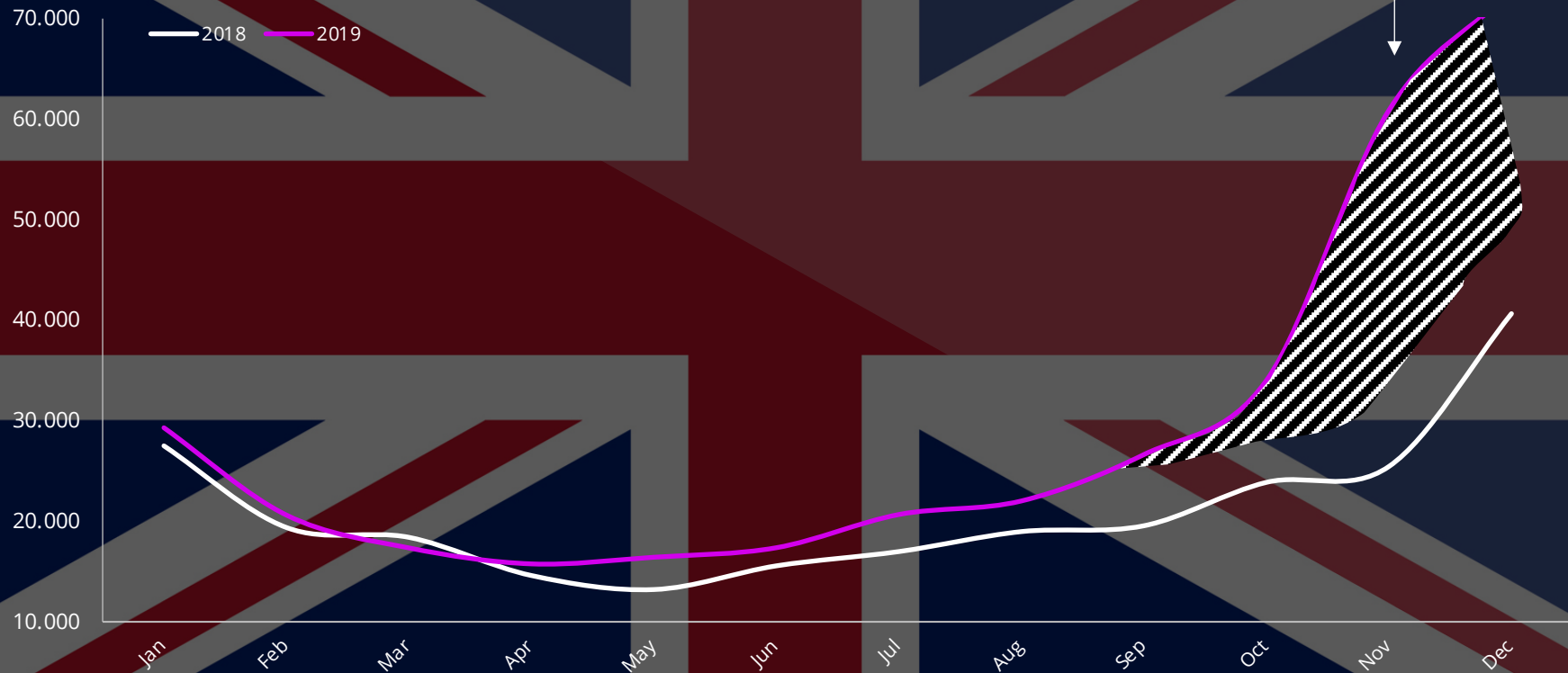




The Apprentice Episode 7: Advertising Task (Re-branding Finland) - Key Business Lessons for Entrepreneurs



United Kingdom





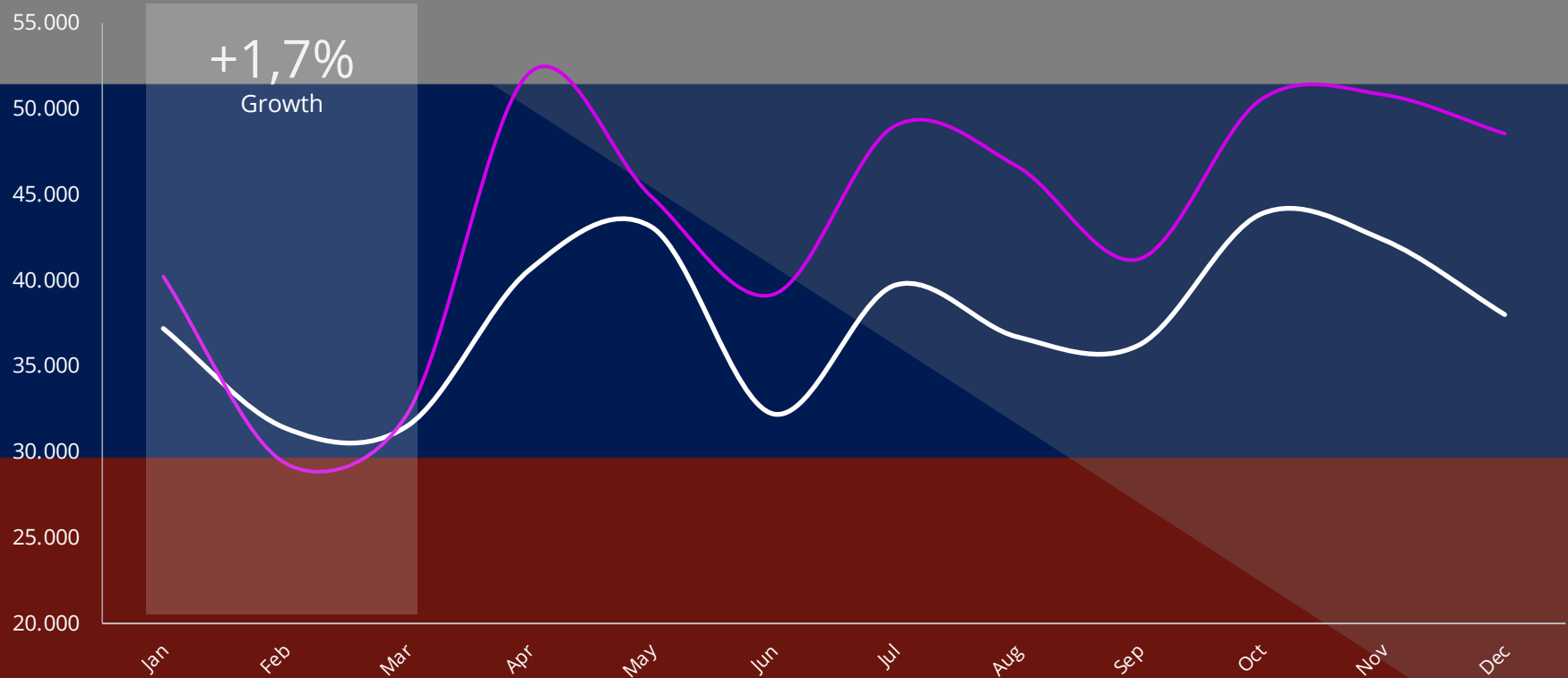
Reason 3 (continuation)

Germany and United Kingdom's appeal increases, in particular for *Packages* and *Northern Lights*, while Russia does not grow in winter searches compared to last year.

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	Rest of the world	1.694.428	+24,7%

In Q1 2019, Russia is not growing as un the rest of the year



Which can be noted also for the following Brandtags





Reasons for the Q3-Q4 increase

R1. Finland's top brandtags grow more in the second part of the year.

R2. Japan experiences an extraordinary growth

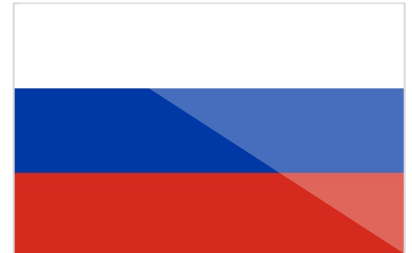
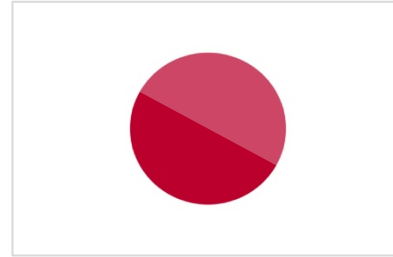
R3. Germany and United Kingdom's appeal increases, in particular for *Packages* and *Northern Lights*, while Russia does not grow in winter searches compared to last year

The reasons behind the growth for searches is a combination of brandtags and markets

Brandtags



Markets



Conclusions

1. Finland is the fastest growing country compared to other countries in the North.
2. Increase demand for the top brandtags, more than ever.
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5. Japanese and German campaigns worked, along with a positive impact on the “The apprentice” in the UK.



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Thank you!

Gonzalo Vilar
Strategy director
gvilar@bloom-consulting.com

[@bloomconsult](#)