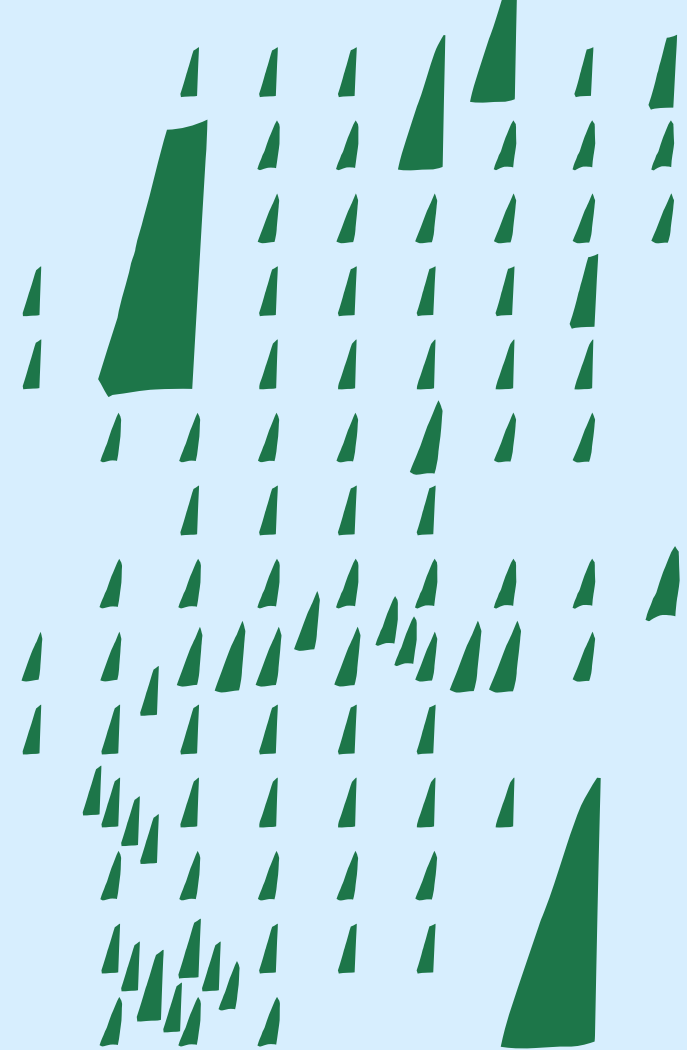


Swiss overnights in Finland



Overnights in Finland in 2022 & top source markets

Year 2022 vs. year 2019

Overnights in 2022

Total foreign 5.0 M

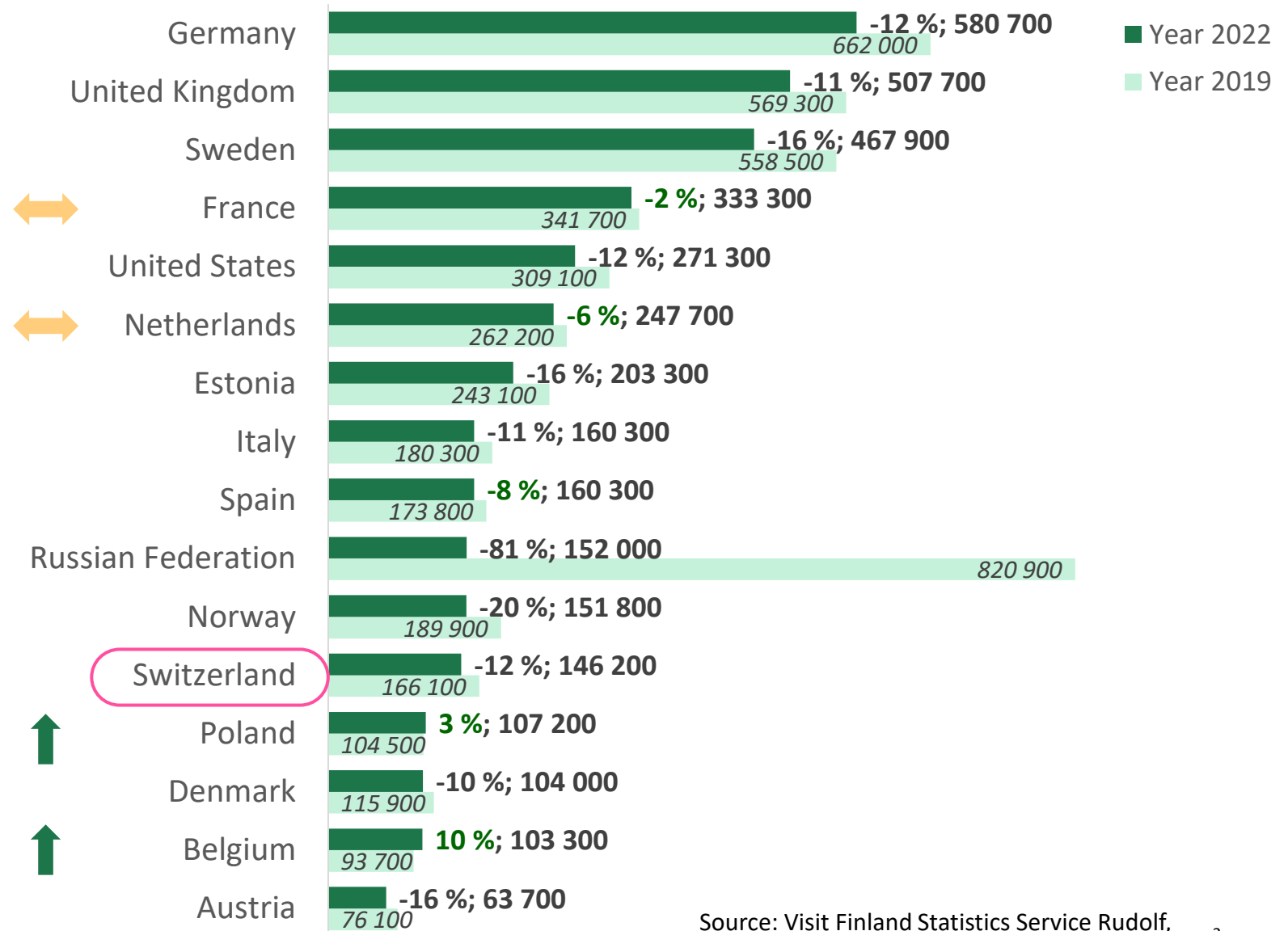
(-29% vs. 2019)

Foreign excl. Russia 4.8 M

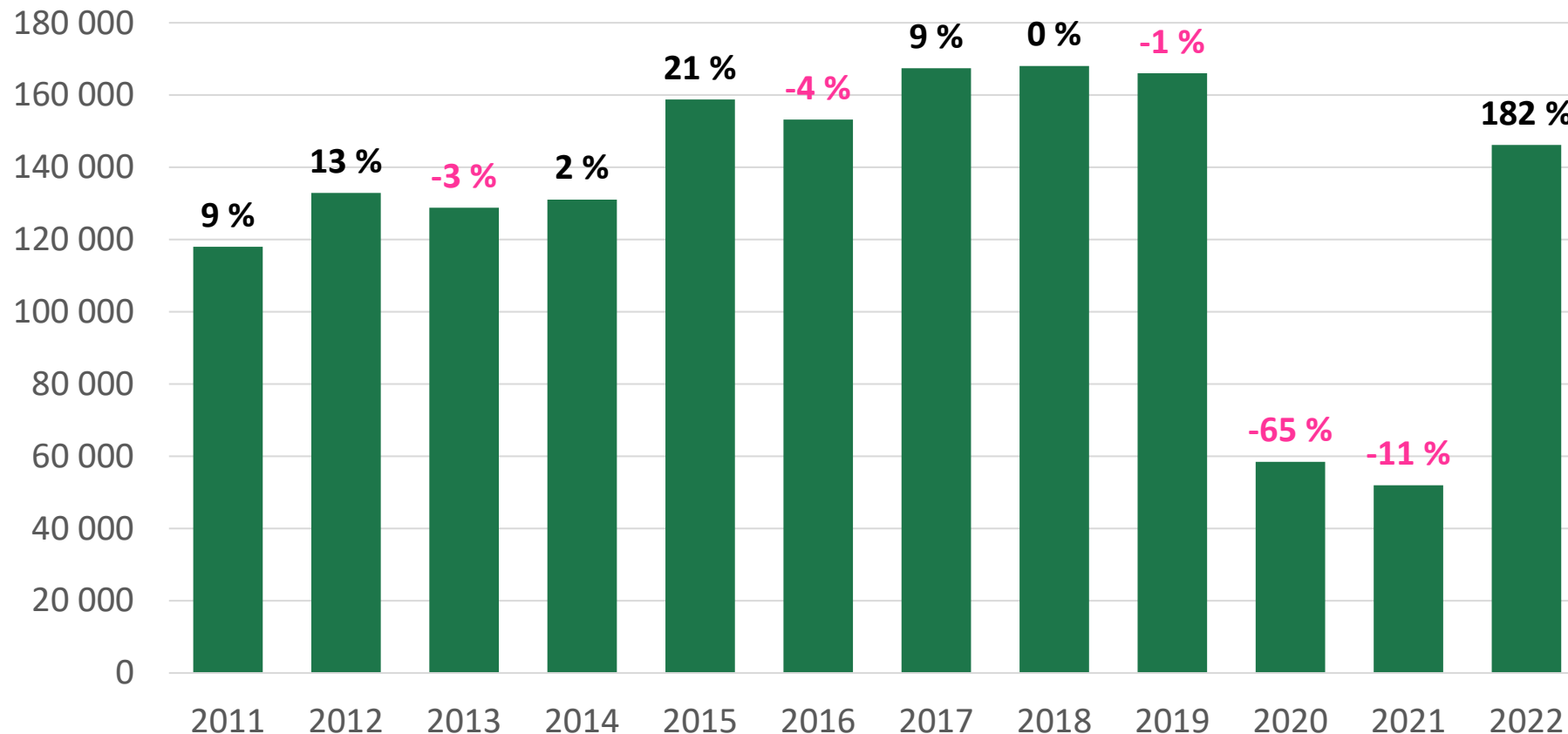
(-23% vs. 2019)

EU+UK 3.4 M

(-9% vs. 2019)



Swiss overnights in Finland 2011-2022

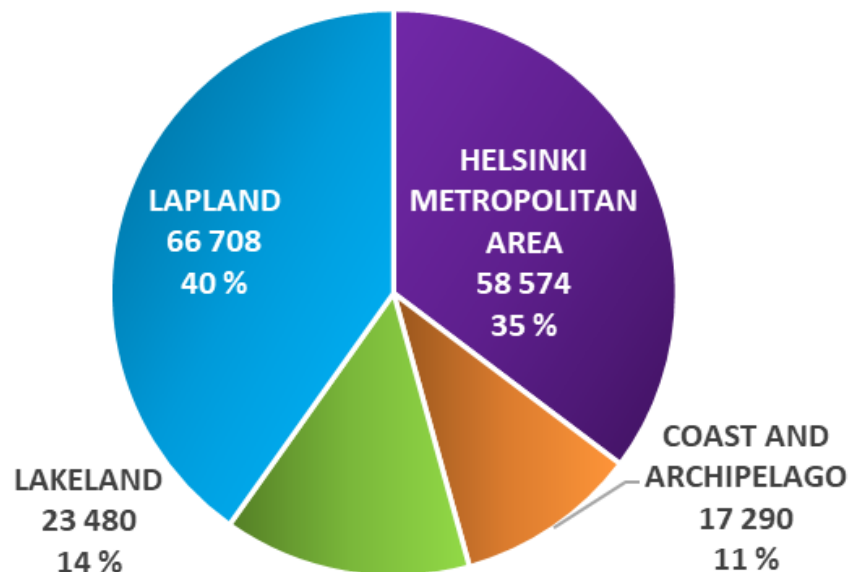


2022
146,200 nights
#12 in market ranking
YoY change +182%
2022 vs. 2019 -12%

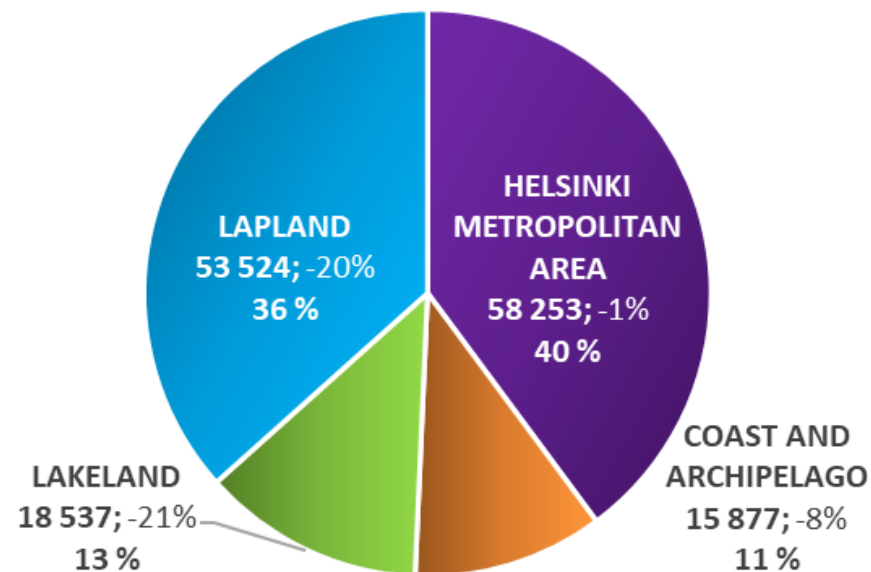
2019
166,100 nights
#14 in market ranking

Swiss overnights in Main Regions 2019 & 2022

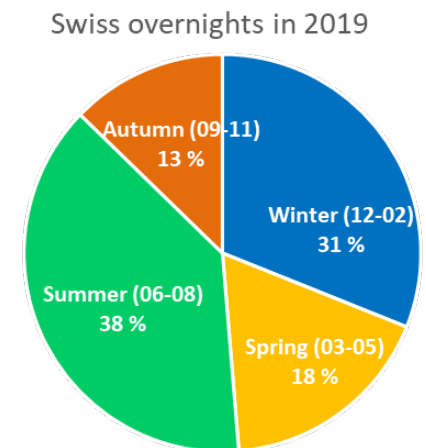
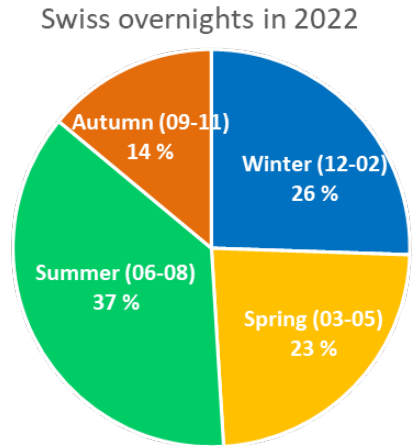
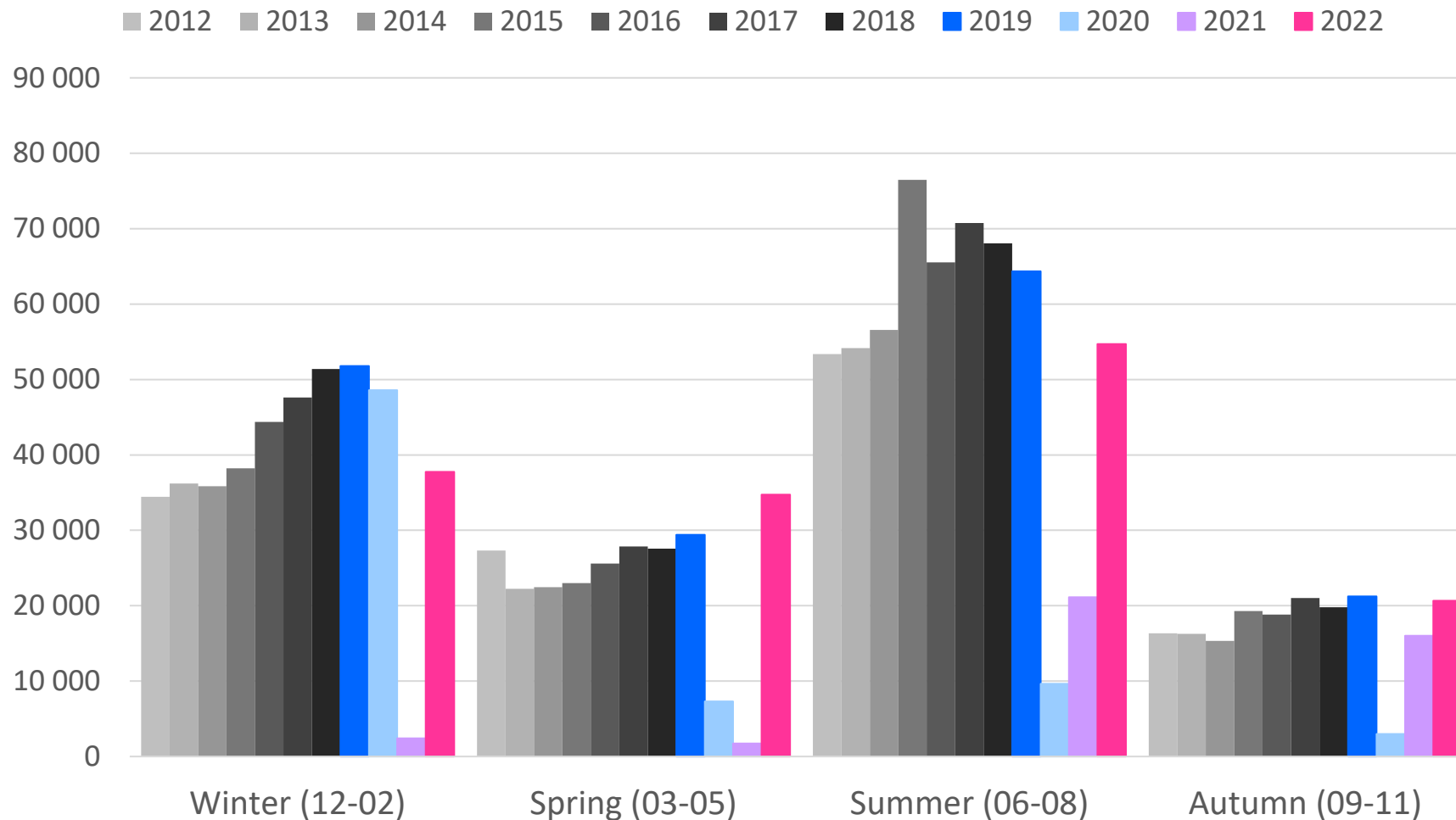
Swiss overnights in main marketing areas
Year 2019



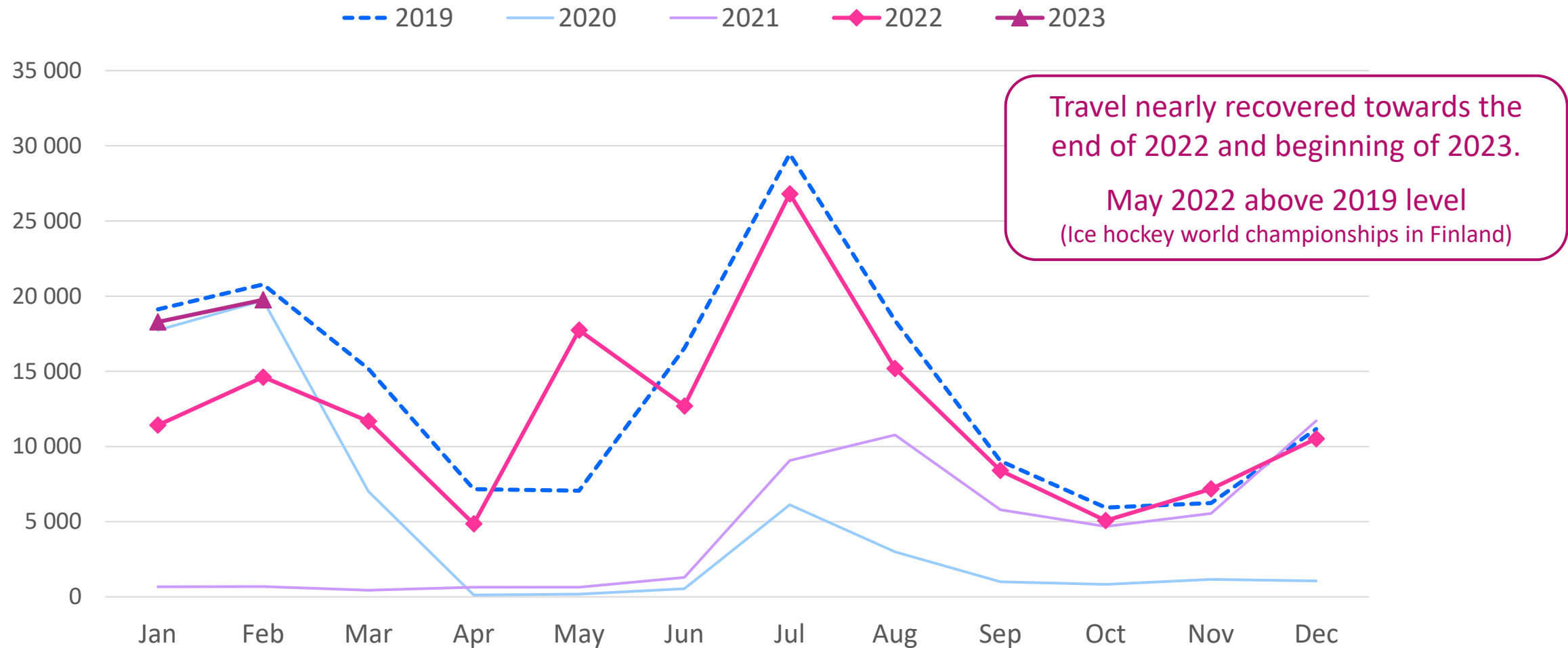
Swiss overnights in main marketing areas
Year 2022 & change-% vs. 2019



Switzerland – Seasonal Overnights in Finland 2012-2022



Swiss monthly overnights in Finland 2019-2023

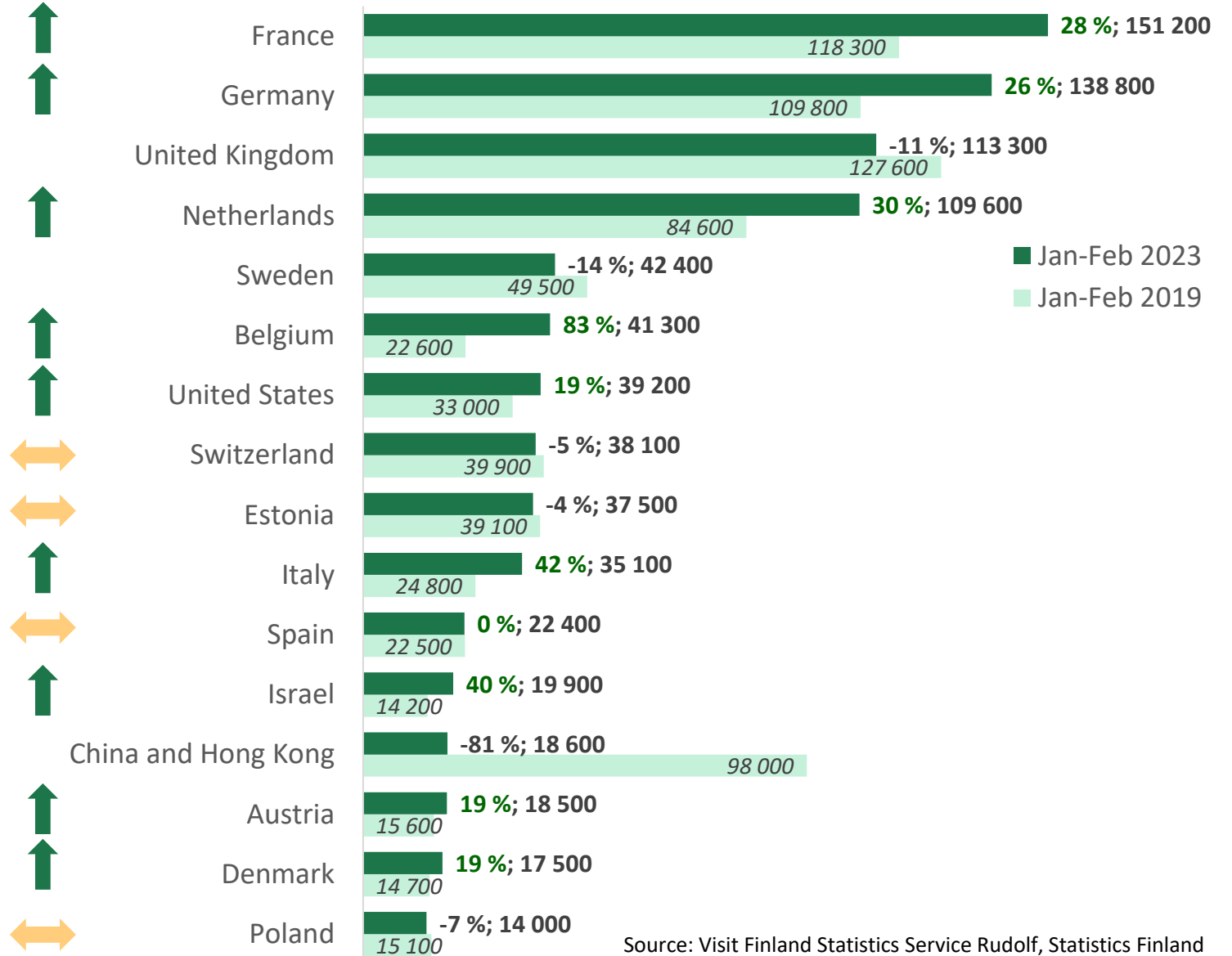


Top16 countries 2023 – overnights in Finland

Jan-Feb 2023 vs. Jan-Feb 2019

Top5 origin countries for Feb2023 overnights

	Overnights	Change to Feb2019
France	79 800	+28%
Germany	77 000	+22%
Netherlands	54 300	+19%
UK	53 100	-15%
Belgium	22 800	+81%



Foreign overnights in high winter season 2022-2023

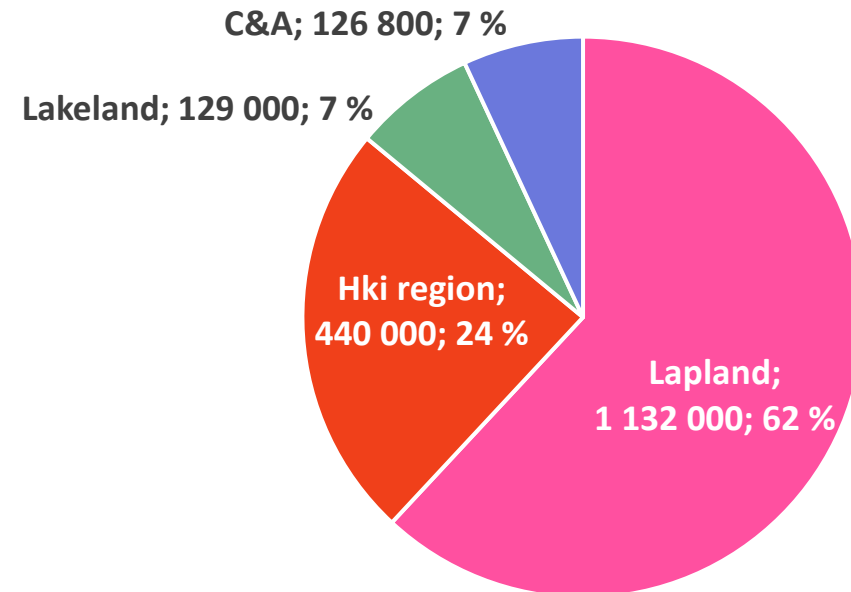
And change compared to pre-pandemic

High winter season (12-02)

	Dec2018- Feb2019	Dec2022- Feb2023	Change 2023 vs. 2019
United Kingdom	334 900	341 100	+2%
France	161 700	209 900	+30%
Germany	151 300	180 700	+19%
Netherlands	106 700	131 200	+23%
USA	53 800	64 700	+20%
Sweden	75 100	63 600	-15%
Spain	59 400	63 100	+6%
Italy	42 900	59 900	+40%
Estonia	58 200	59 600	+2%
Belgium	30 300	51 100	+69%
Switzerland	51 800	48 600	-6%
China & Hong Kong	139 700	33 200	-76%
Singapore	35 300	31 400	-11%
Ireland	14 900	28 600	+92%
Australia	32 600	26 000	-20%
Denmark	21 200	24 300	+14%

1.8 M foreign overnights
(-12% vs. winter2019)

- **1.3 M** from EU-27 + UK (+15%)
- **186,000** from Asia (-46%)
- **88,000** from America (+21%)



Winter high season 2023: Foreign overnights in main regions

And comparison with winter high season 2019

Lapland region

1,132,000 overnights
+8% vs. winter2019

Share of all foreign **62%**

Main dest: **Rovaniemi, Inari-Saariselkä, Levi, Ylläs**

Helsinki region

440,000 overnights
-26% vs. winter2019

Share of all foreign **24%**

Main dest: **Helsinki**

Lakeland

129,000 overnights
-53% vs. winter2019

Share of all foreign **7%**

Main dest: **Tampere, Lahti, Jämsä, Sotkamo, Jyväskylä**

Coast & archipelago

126,800 overnights
-19% vs. winter2019

Share of all foreign **7%**

Main dest: **Oulu, Syöte, Turku, Åland, Vaasa**

Top5 countries of origin

UK	298,700	+8%
France	179,600	+38%
Germany	111,100	+44%
Netherlands	103,800	+35%
Spain	41,900	+5%

Top5 countries of origin

Germany	38,100	-5%
USA	35,900	+12%
UK	33,700	-23%
Sweden	30,800	-15%
France	19,200	+8%

Top5 countries of origin

Estonia	22,200	+4%
Germany	14,000	-16%
Netherlands	6,600	-22%
Sweden	6,400	-41%
UK	5,200	-29%

Top5 countries of origin

Sweden	19,700	-10%
Germany	17,600	0%
Estonia	9,500	-18%
Netherlands	7,600	+19%
France	6,000	+14%

Ylläs the most popular winter destination for the Swiss visitors in Lapland region during high winter season 2022-2023

Dec 2022 – Feb 2023

34,900 Swiss overnights
in the Lapland region

-7% vs. winter 2019
&
-2% vs. winter 2020

Most popular destinations for Swiss visitors in Lapland during winter 2023

Kolari-Ylläs	16,800
Rovaniemi	4,900
Kittilä-Levi	3,800
Inari-Saariselkä	3,400
Sodankylä	2,600
Muonio	1,700

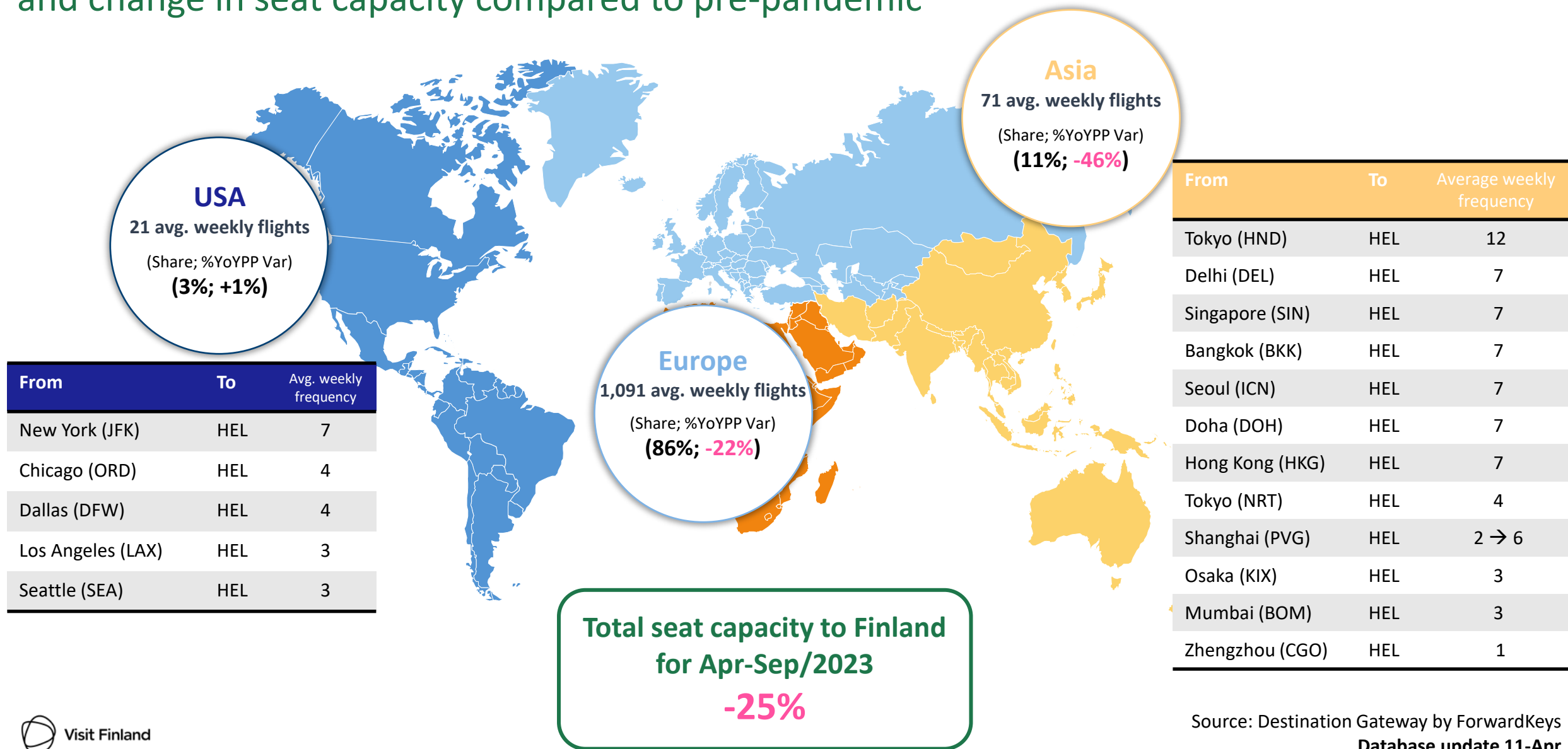


ForwardKeys

Seat capacity & Flight arrivals/bookings

Direct flights to Finland April – September 2023

and change in seat capacity compared to pre-pandemic



Direct flights to FIN, SWE, NOR / April – September 2023

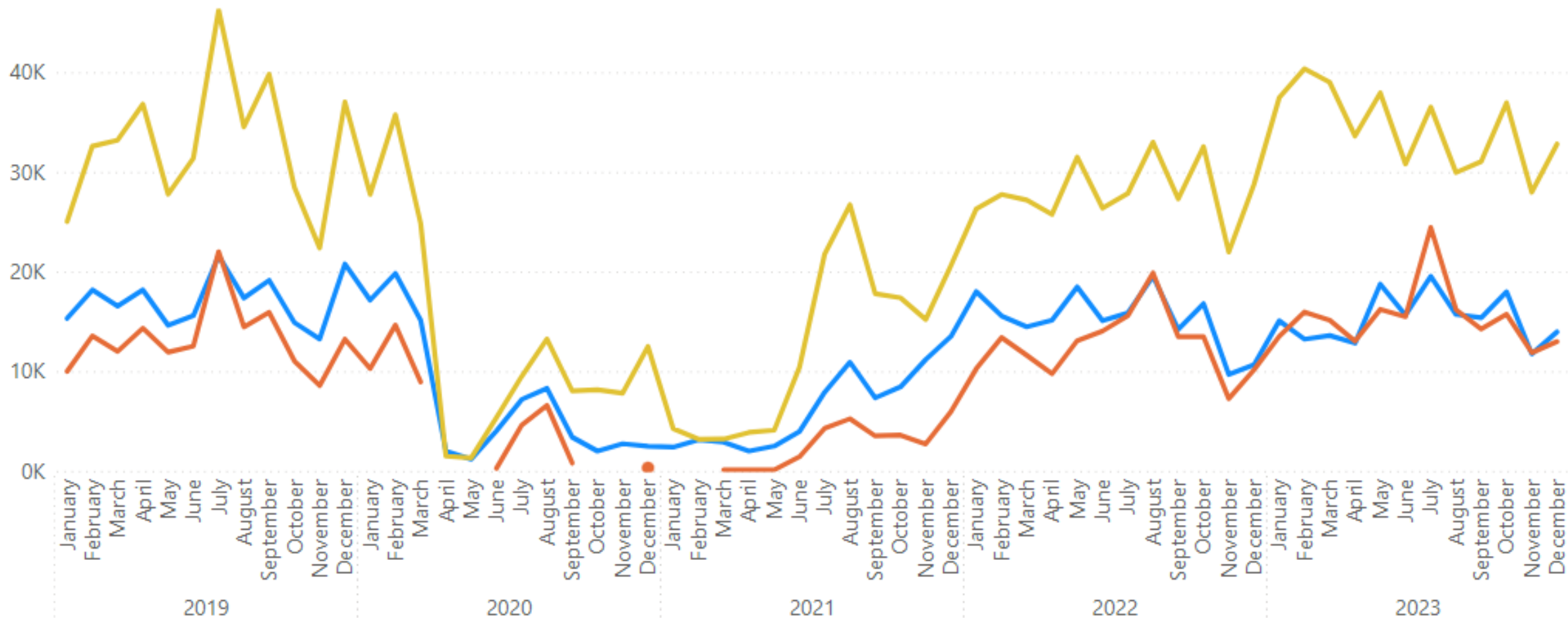
and change in seat capacity compared to pre-pandemic

	Seat capacity from USA	change-% vs. pre-pandemic from USA	Seat capacity from Asia	change-% vs. pre-pandemic from Asia	Seat capacity from Europe	change-% vs. pre-pandemic from Europe	Seat capacity TOTAL INT'L	change-% vs. pre-pandemic TOTAL INT'L
Finland	153,700	+1%	538,000	-46%	4,219,200	-22%	4,911,500	-25%
Sweden	155,500	-38%	260,800	-41%	8,271,600	-14%	8,764,000	-15%
Norway	107,900	-25%	123,300	-40%	7,529,200	-6%	7,760,500	-8%

Monthly seat capacity from Switzerland to FIN, SWE, NOR 2019-2023

TOTAL SEAT CAPACITY
DESTINATION COUNTRY: ● FI ● NO ● SE

From Switzerland



Seat capacity from Switzerland to Finland / Apr-Sep 2023

Comparison to pre-pandemic

Seat capacity from Switzerland to **Finland** will be **6% below** the pre-pandemic during spring-summer 2023

→ Switzerland (excl. domestic) → Finland **Pre-pandemic analysis**

Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

2 airports **-6.0%** YOYPP for selected locations



-6.0% YOYPP for selected airlines

Share ↑↓ YOYPP ↑↓



Helvetic Airways will operate once a week from Zurich to Kittilä from mid-Jun to mid-Sep

Seat capacity from Switzerland to Sweden / Apr-Sep 2023

Comparison to pre-pandemic

✈️ Switzerland (excl. domestic) → Sweden **Pre-pandemic analysis**

Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

2 airports **-3.6%** YOYPP for selected locations

Seat capacity from Switzerland to Sweden will be **4% below** the pre-pandemic during spring-summer 2023



-3.6% YOYPP for selected airlines



Seat capacity from Switzerland to Norway / Apr-Sep 2023

Comparison to pre-pandemic

✈️ Switzerland (excl. domestic) → Norway **Pre-pandemic analysis**

Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

2 airports **+14.5%** YOYPP for selected locations

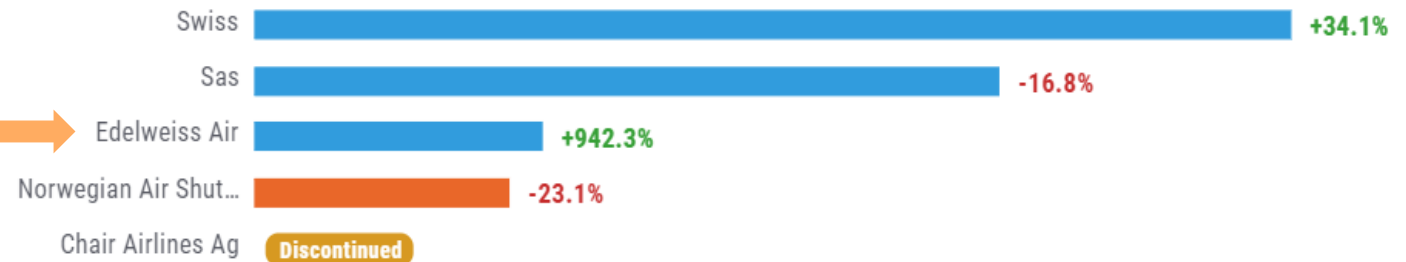
Seat capacity from Switzerland to Norway will be **15% above** the pre-pandemic during spring-summer 2023



+14.5% YOYPP for selected airlines

Share ↑↓ YOYPP ↑↓

Flights to Bergen and Tromso



Change in flight bookings* for Jun-Aug 2023 compared to summer pre-pandemic

*change in flight bookings for
Jun-Aug → data update 12.3.

→ 2.4.

Total int'l
summer 2023 vs. 2019



June-August

101,000

No. of flight tickets*

15,600

10,200

8,900

6,900

6,100

4,600

4,500

3,300

3,200

2,900

1,500

Germany



USA



UK



Switzerland



France



Hong Kong



Netherlands



Italy



Spain



Sweden



Japan



Please note! Ryanair, EasyJet and most of the charter flight bookings are not included in the booking data and this needs to be taken into account when comparing the markets.

Change in flight arrivals/booking from Switzerland

Comparison to pre-pandemic

- Travel from Switzerland seems to be recovering clearly faster to Norway than to Finland and Sweden.
- Bookings to Finland for the coming summer are still around 20% below 2019 levels.

Destination benchmark

YOYPP of tourist arrivals

Data updated 09-Apr

Switzerland - Change in arrivals / bookings vs. pre-pandemic

Tourist arrivals to my competing destinations



Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.
Most of the charter flights also missing.

Flight bookings for summer 2023 (Jun-Aug)

Comparison with pre-pandemic



Switzerland - Bookings for Jun-Aug 2023

	June	July	August	Jun-Aug
Finland	2,400	3,700	1,200	7,300
Sweden	4,700	7,200	2,700	14,600
Norway	3,700	5,100	2,400	11,200
	YOYPP	YOYPP	YOYPP	YOYPP
Finland	-15%	-26%	-10%	-20%
Sweden	-24%	-19%	-18%	-20%
Norway	-4%	0%	+4%	0%

Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.

