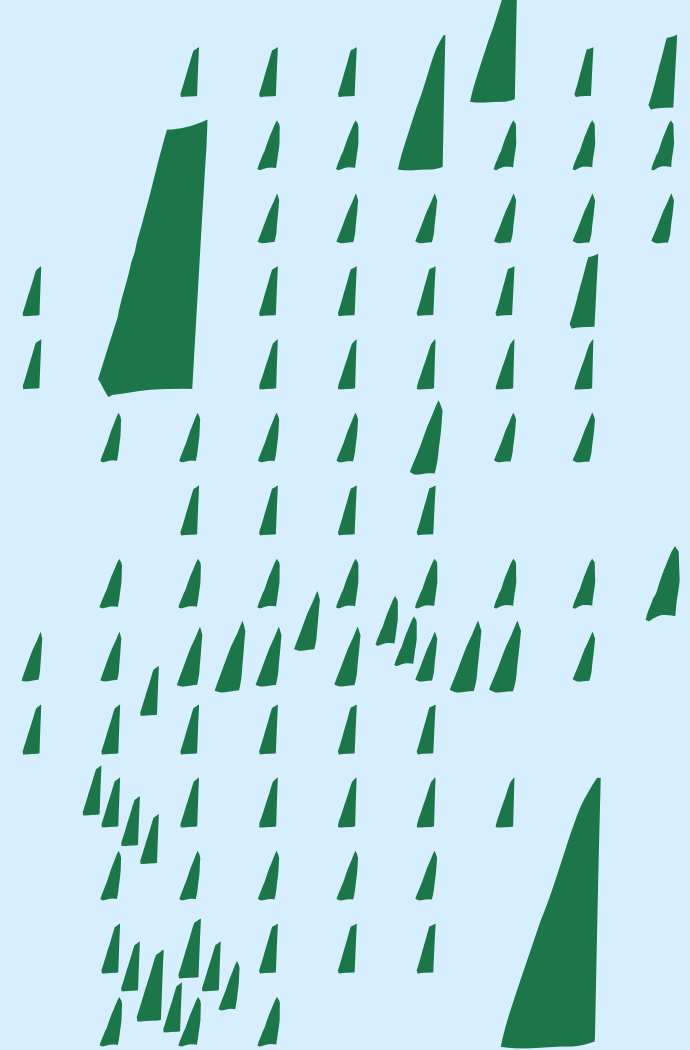


Visit Finland

# United Kingdom – market insights

May 2023

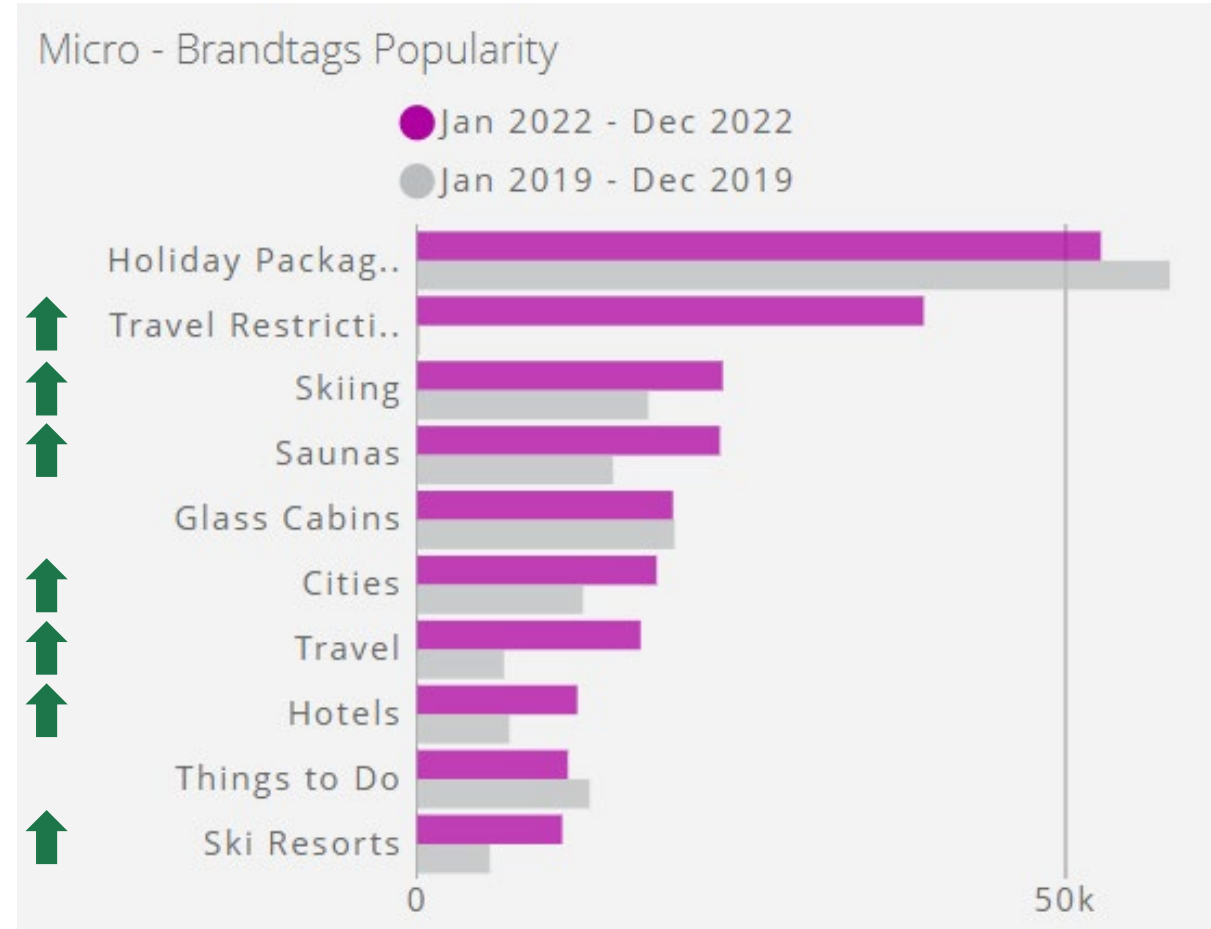
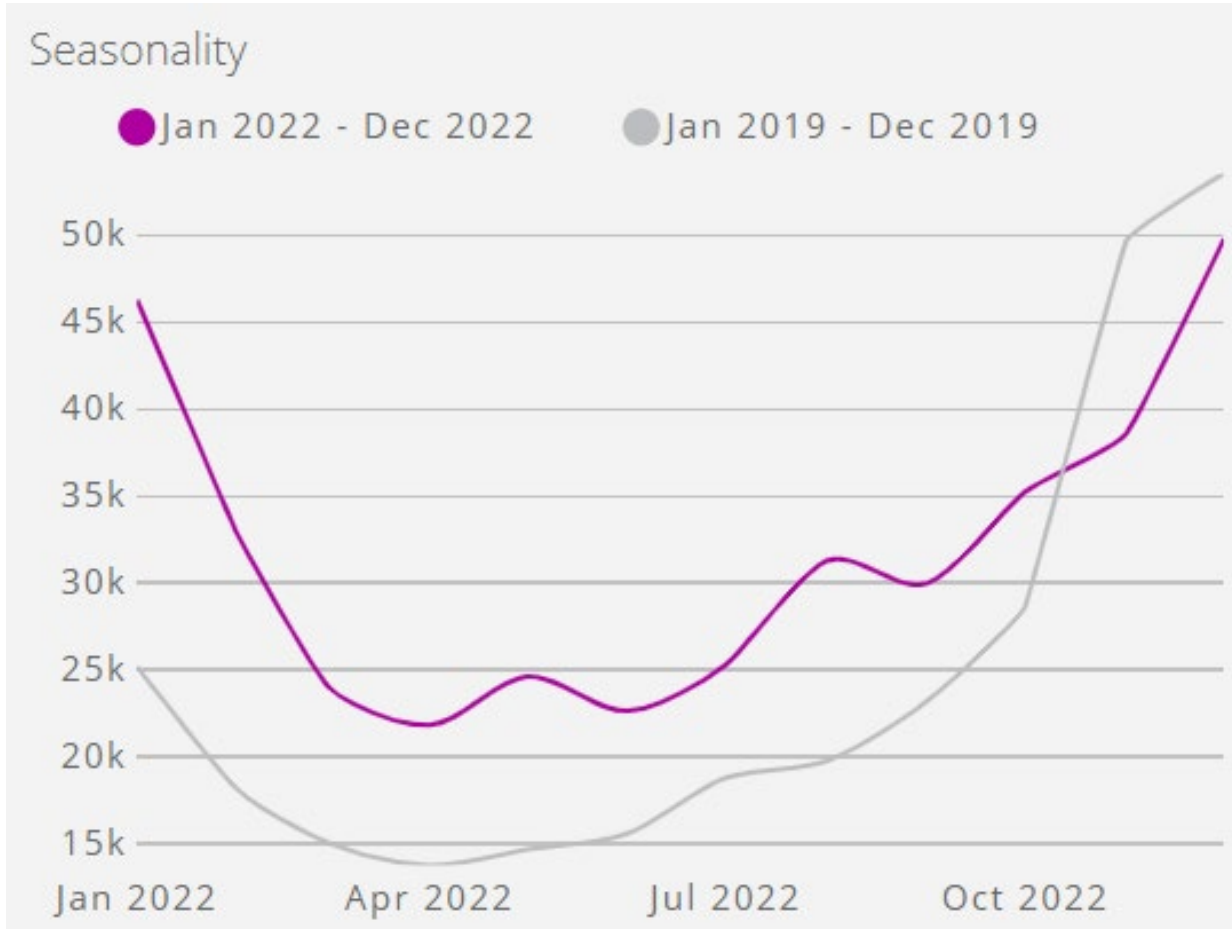
# Travel related internet searches 2022 vs. 2019



# Top Target Markets 2022 vs. 2019

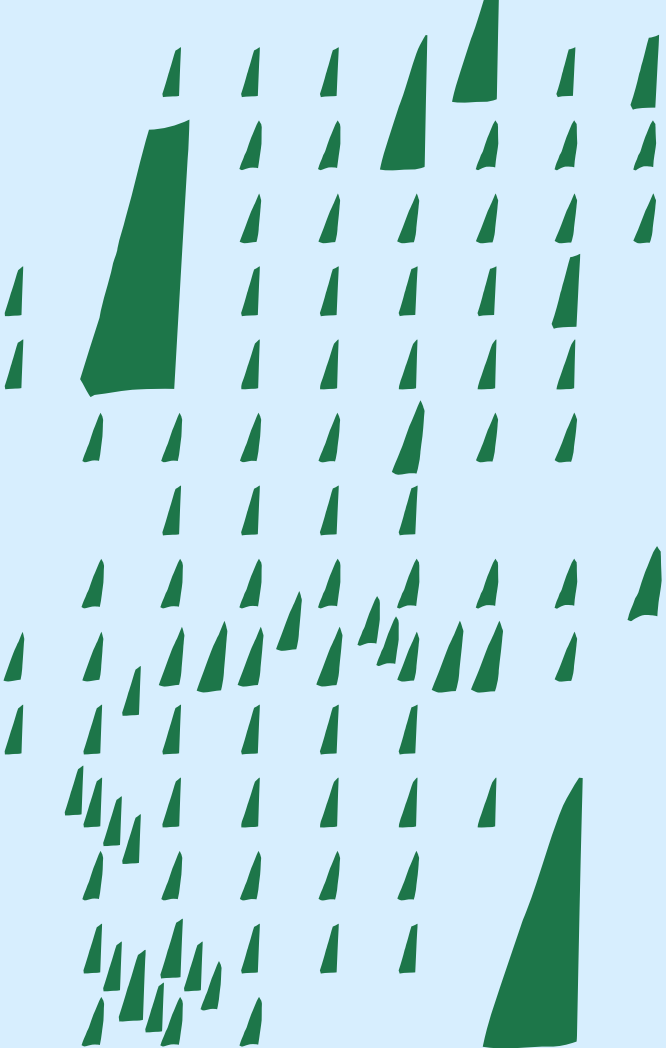
Target Market Distribution				2022	22/19
Rank	Flag	Country		Searches	Growth
1		Germany		635,793	36.7%
2		Japan		592,326	7.9%
3		United States		590,094	53.8%
4		United Kingdom		382,169	29.2%
5		Italy		285,187	33.4%
6		France		283,549	20.9%
7		Spain		243,895	30.5%
8		Estonia		175,015	66.0%
9		Netherlands		166,802	38.1%
10		India		164,824	30.7%

# UK: Seasonality of searches 2022 vs. 2019 & Main topics in 2022



# Overnights in Finland

Year 2022 & Q1-2023



# Overnights in Finland in 2022 & top source markets

Year 2022 vs. year 2019

## Overnights in 2022

**Total foreign 5.0 M**

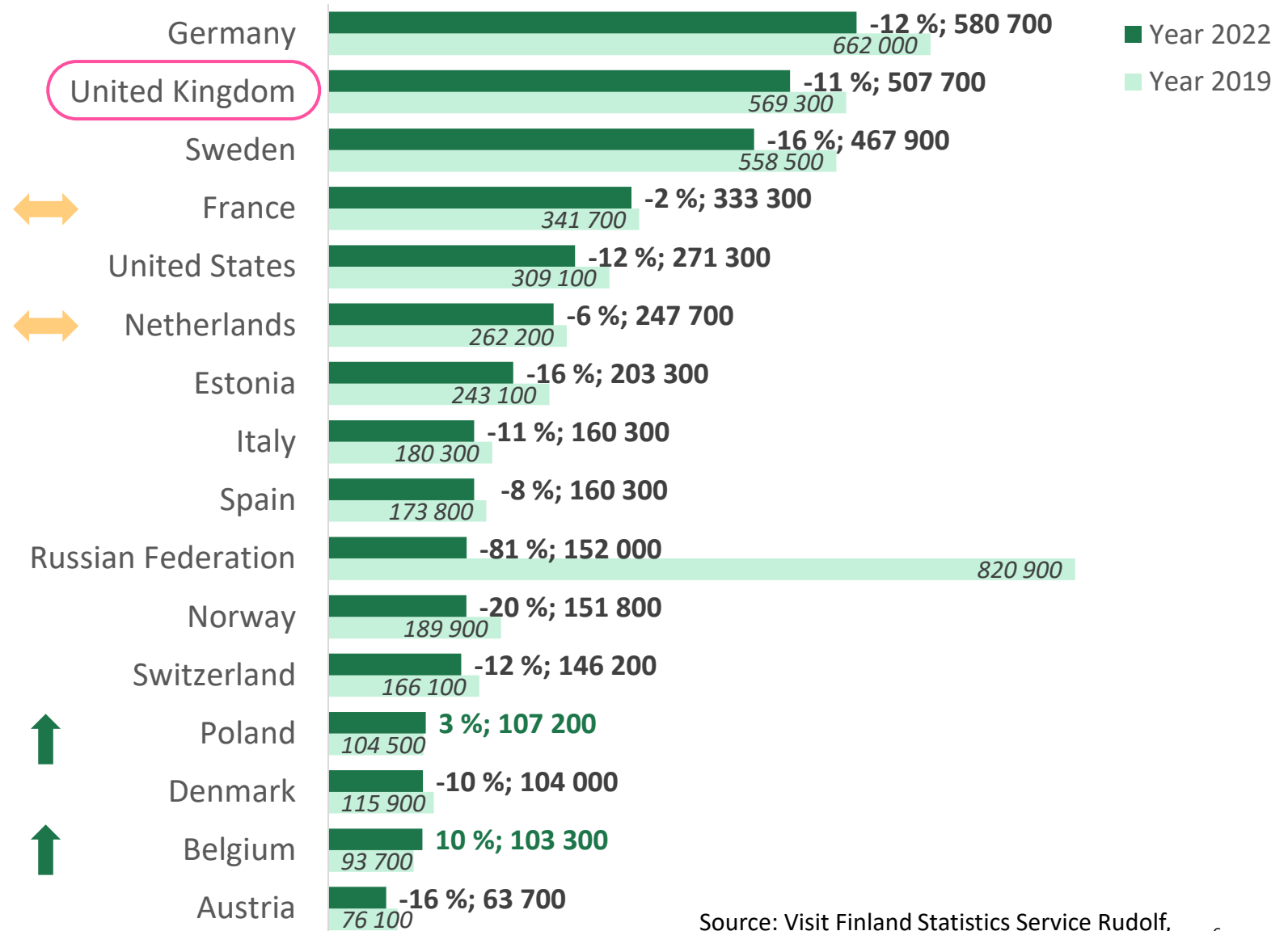
(-29% vs. 2019)

**Foreign excl. Russia 4.8 M**

(-23% vs. 2019)

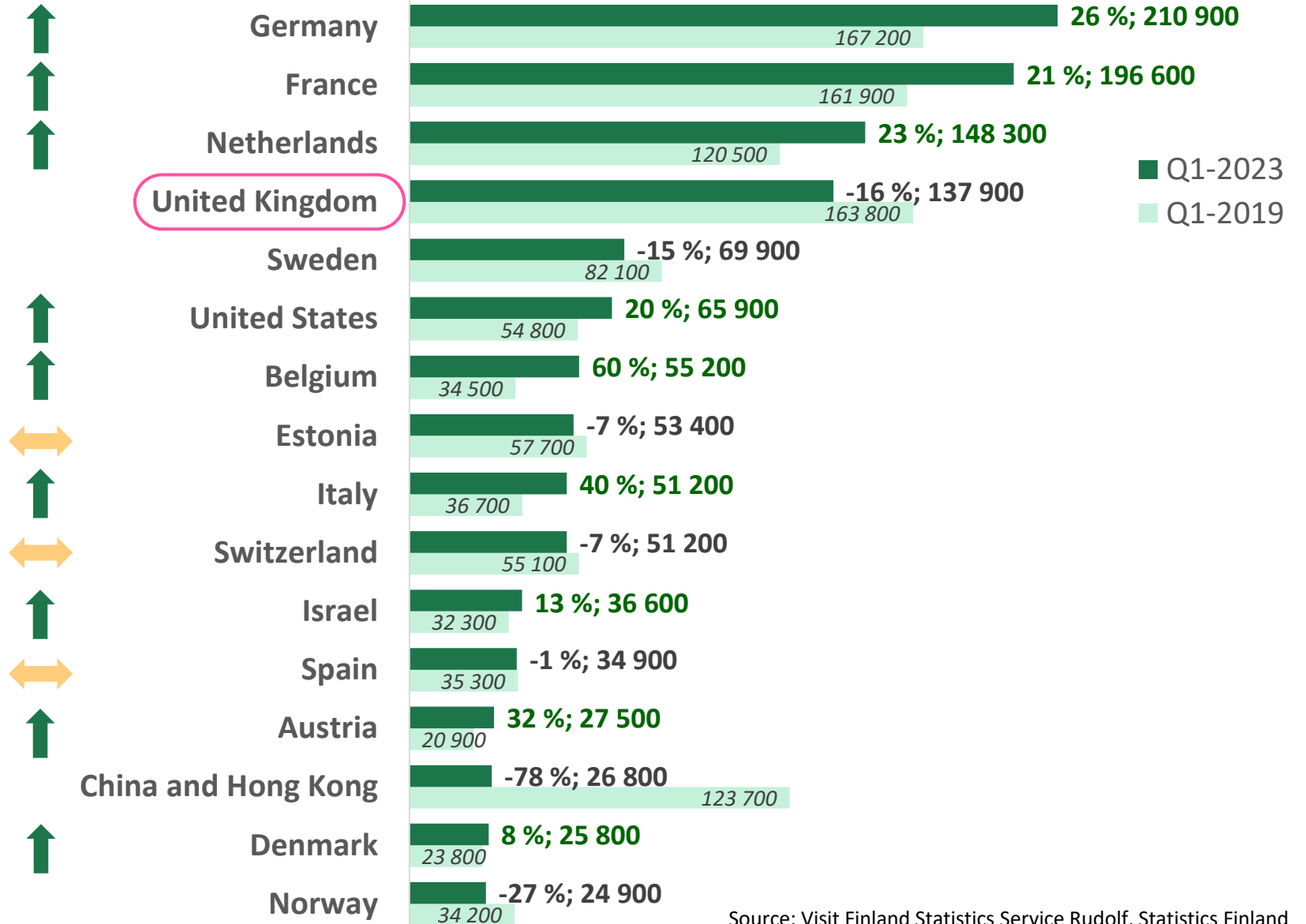
**EU+UK 3.4 M**

(-9% vs. 2019)

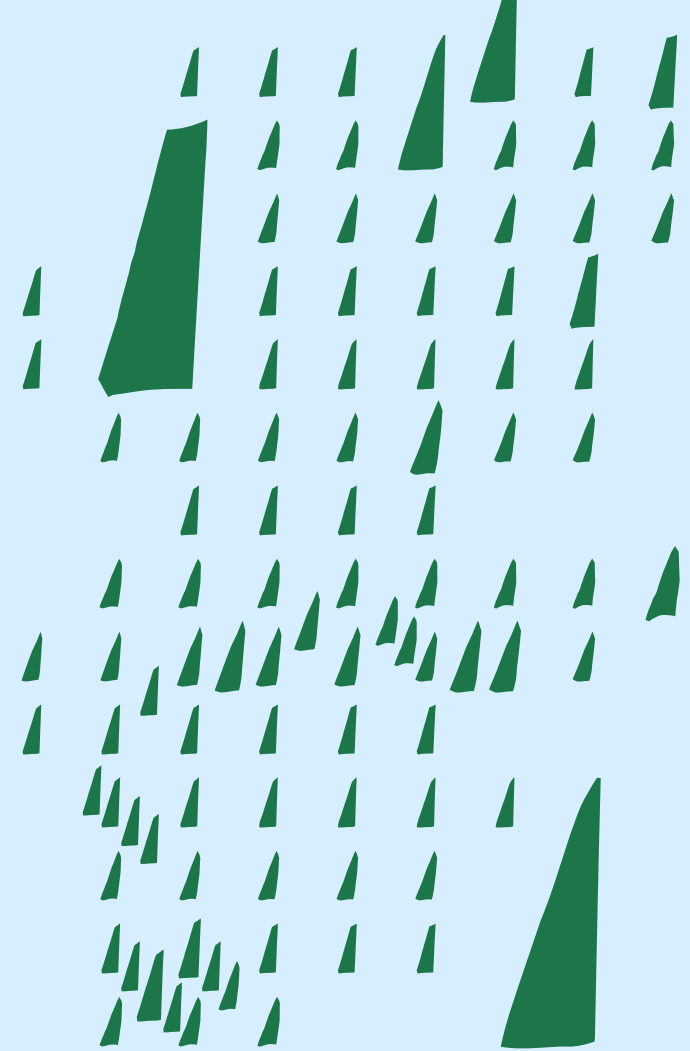


# Top16 countries 2023 – overnights in Finland

Q1-2023 vs. Q1-2019

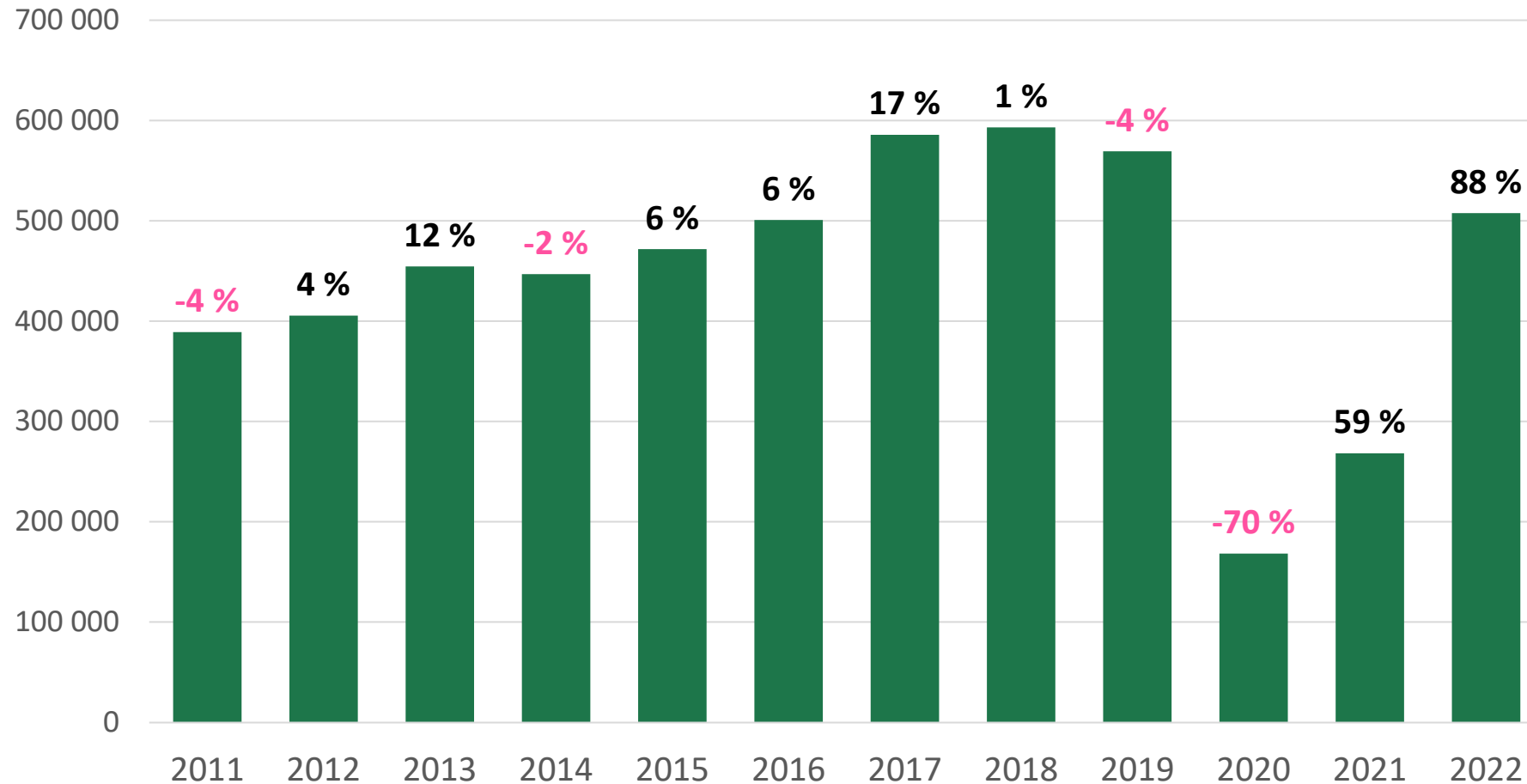


# British overnights in Finland





# British overnights in Finland 2011-2022

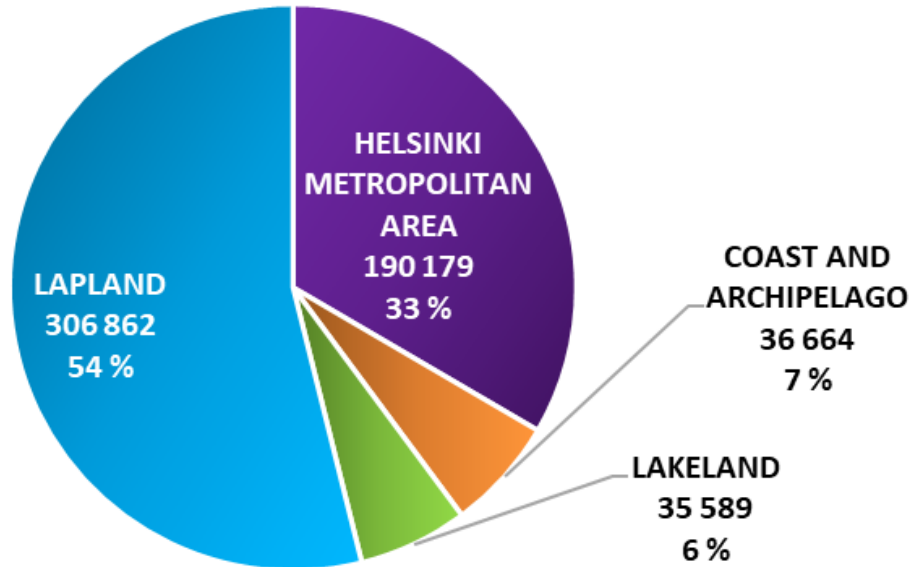


2022  
**507,700** nights  
#2 in market ranking  
YoY change +88%  
2022 vs. 2019 -11%

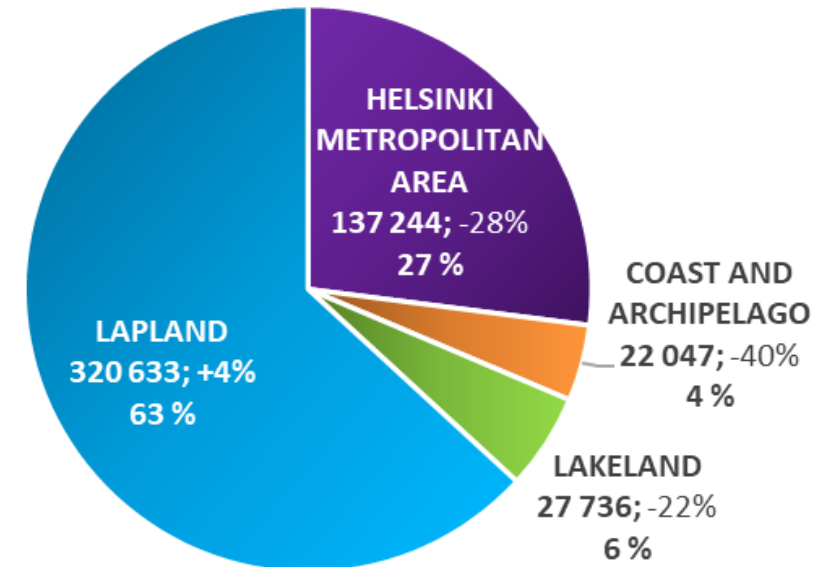
2019  
**569,300** nights  
#3 in market ranking

# British overnights in Main Regions 2019 & 2022

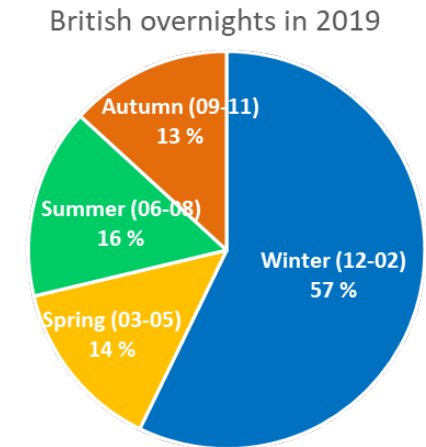
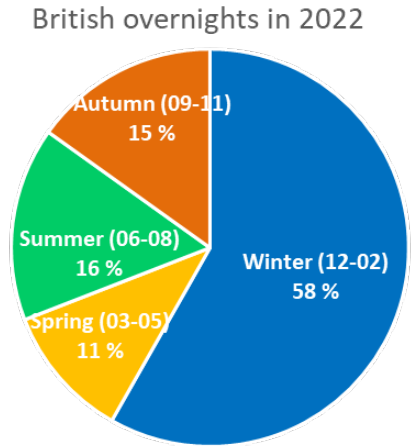
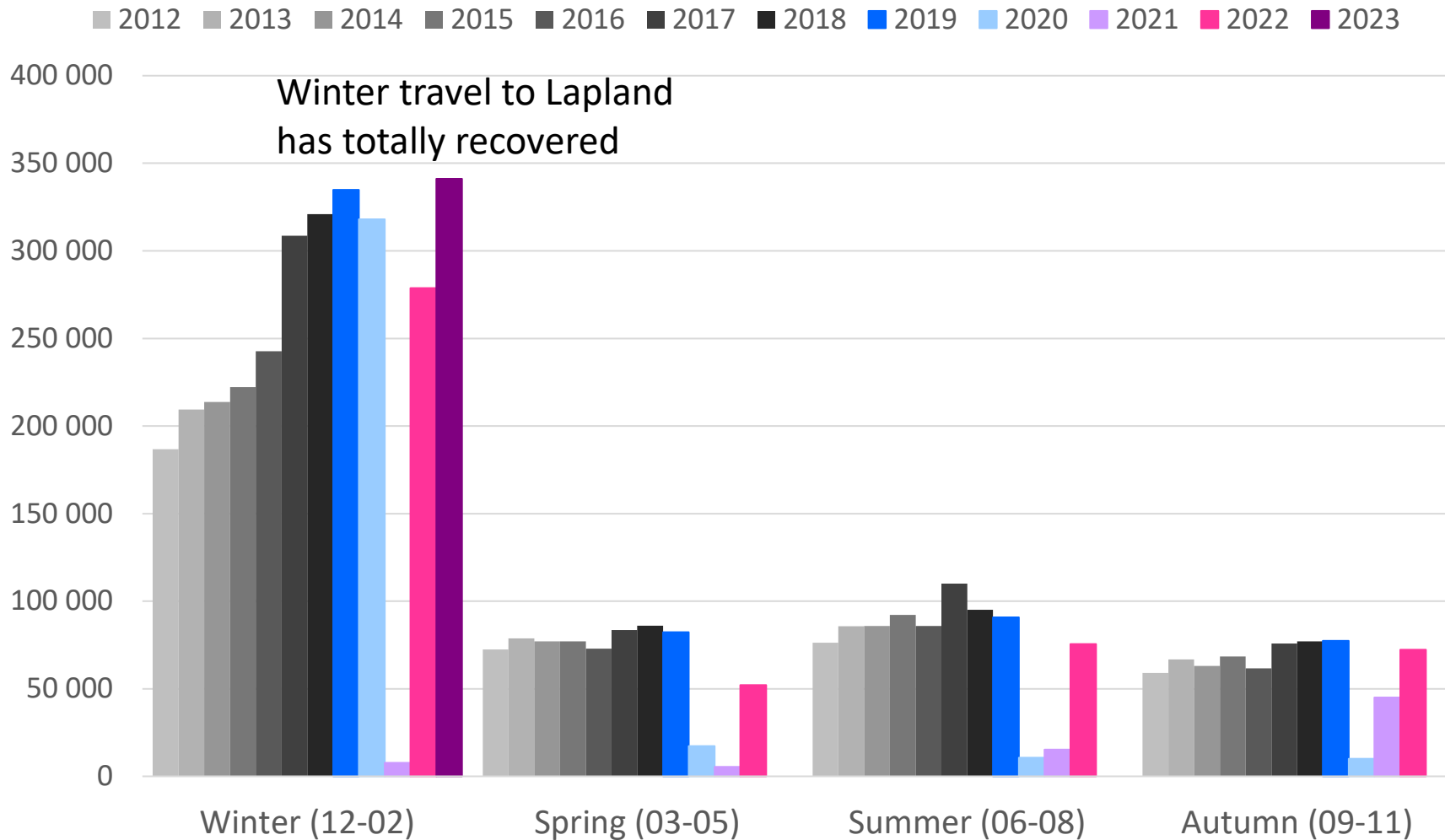
British overnights in main marketing areas  
Year 2019



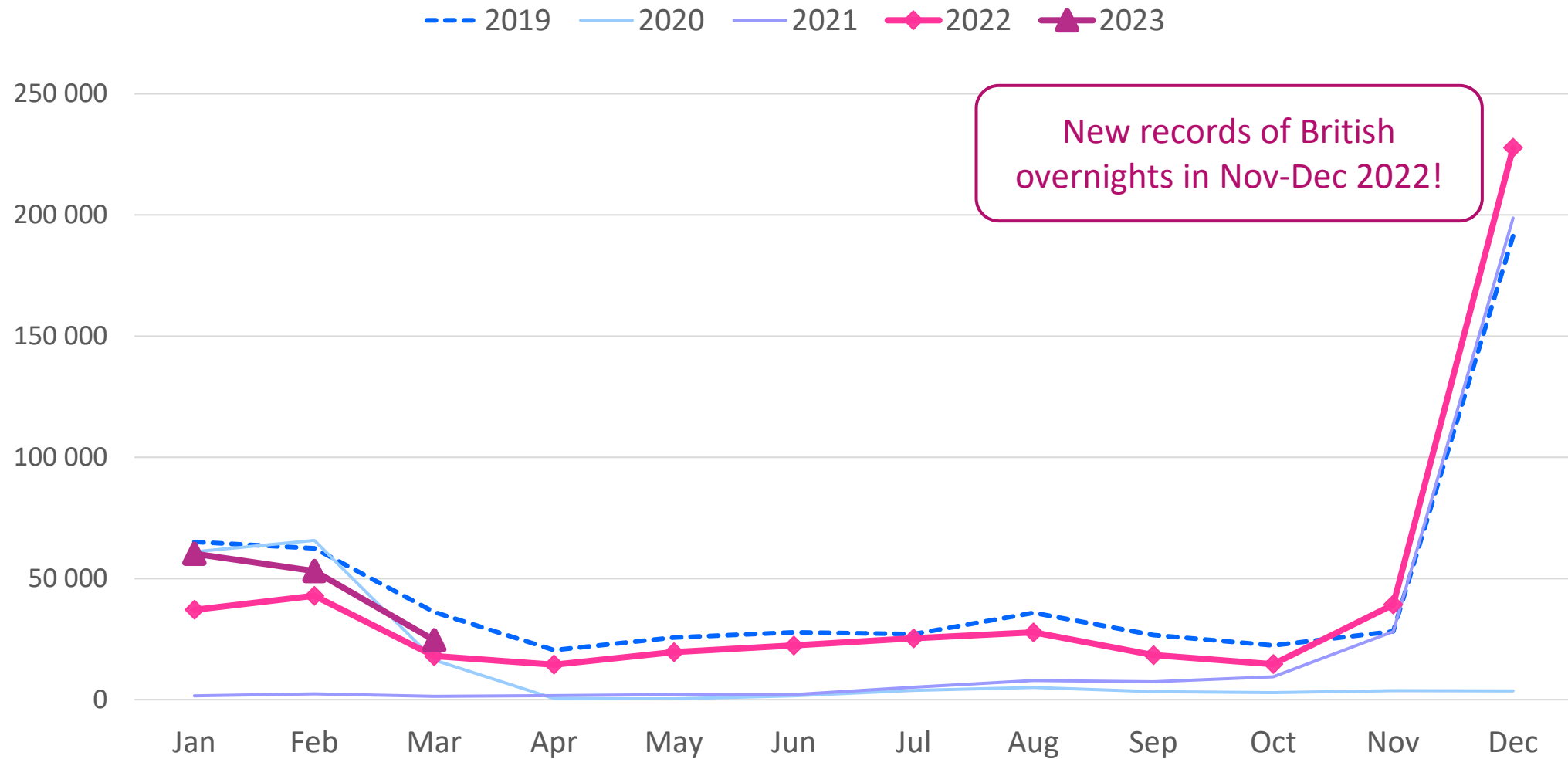
British overnights in main marketing areas  
Year 2022 & change-% vs. 2019



# UK – Seasonal Overnights in Finland 2012-2023



# British monthly overnights in Finland 2019-2023



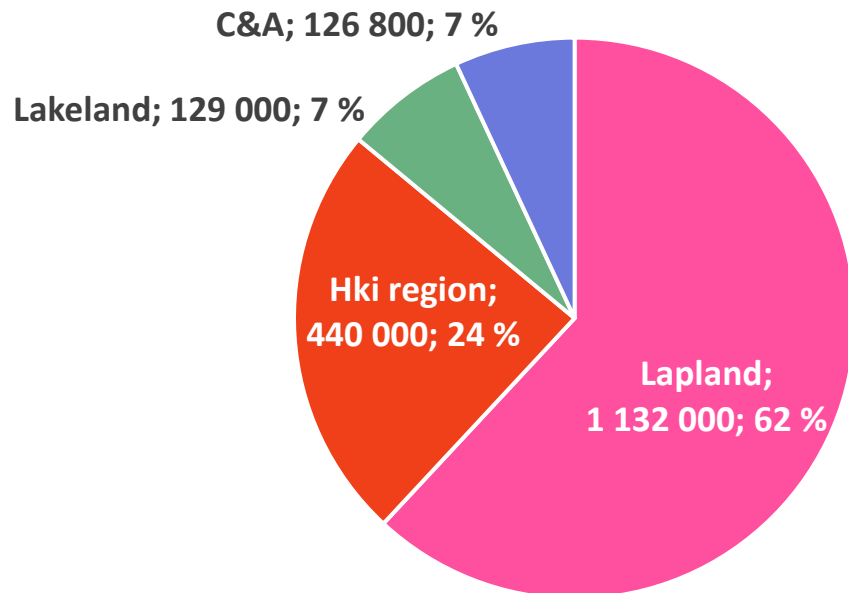
New records of British overnights in Nov-Dec 2022!

# Foreign overnights in high winter season 2022-2023

And change compared to pre-pandemic

**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%)



## High winter season (12-02)

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

# 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**

### Top5 countries of origin

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

## Helsinki region

**440,000** overnights  
-26% vs. winter2019

Share of all foreign **24%**

Main dest: **Helsinki**

### Top5 countries of origin

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

## Lakeland

**129,000** overnights  
-53% vs. winter2019

Share of all foreign **7%**

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

### Top5 countries of origin

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

## Coast & archipelago

**126,800** overnights  
-19% vs. winter2019

Share of all foreign **7%**

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

### Top5 countries of origin

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

# British were the largest visitor group in most of the destinations in Lapland region during high winter season 2022-2023

**Dec 2022 – Feb 2023**

**265,900** British overnights  
in the Lapland region

+8% vs. winter 2019  
&  
+12% vs. winter 2020

## Most popular destinations for British visitors in Lapland during winter 2023

<b>Kittilä-Levi</b>	<b>64,300</b>
<b>Inari-Saariselkä</b>	<b>51,200</b>
<b>Rovaniemi</b>	<b>44,400</b>
<b>Kolari-Ylläs</b>	<b>39,200</b>
<b>Kuusamo</b>	<b>34,200</b>
<b>Sodankylä</b>	<b>20,200</b>
<b>Enontekiö</b>	<b>17,600</b>



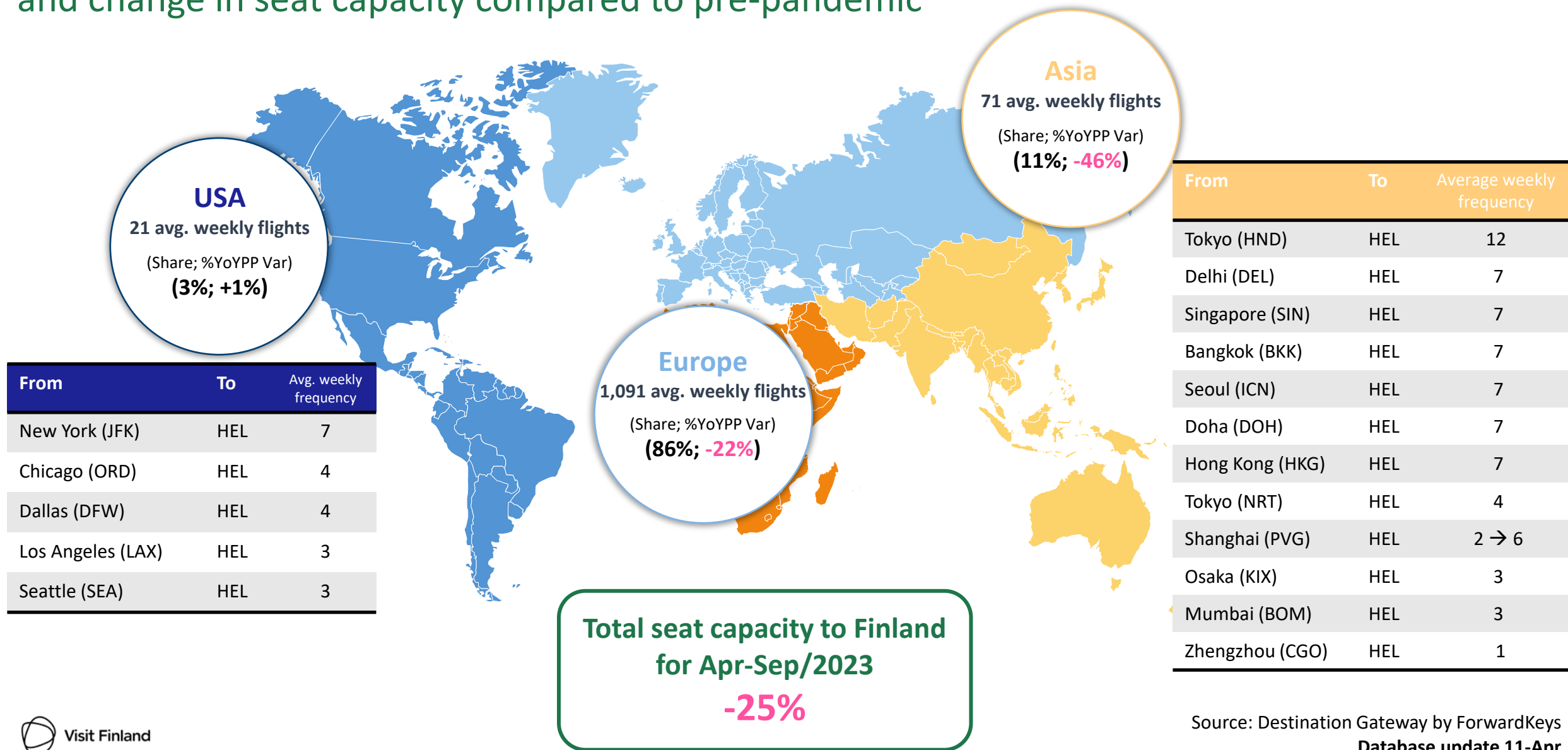
ForwardKeys

# Seat capacity



# Direct flights to Finland April – September 2023

and change in seat capacity compared to pre-pandemic

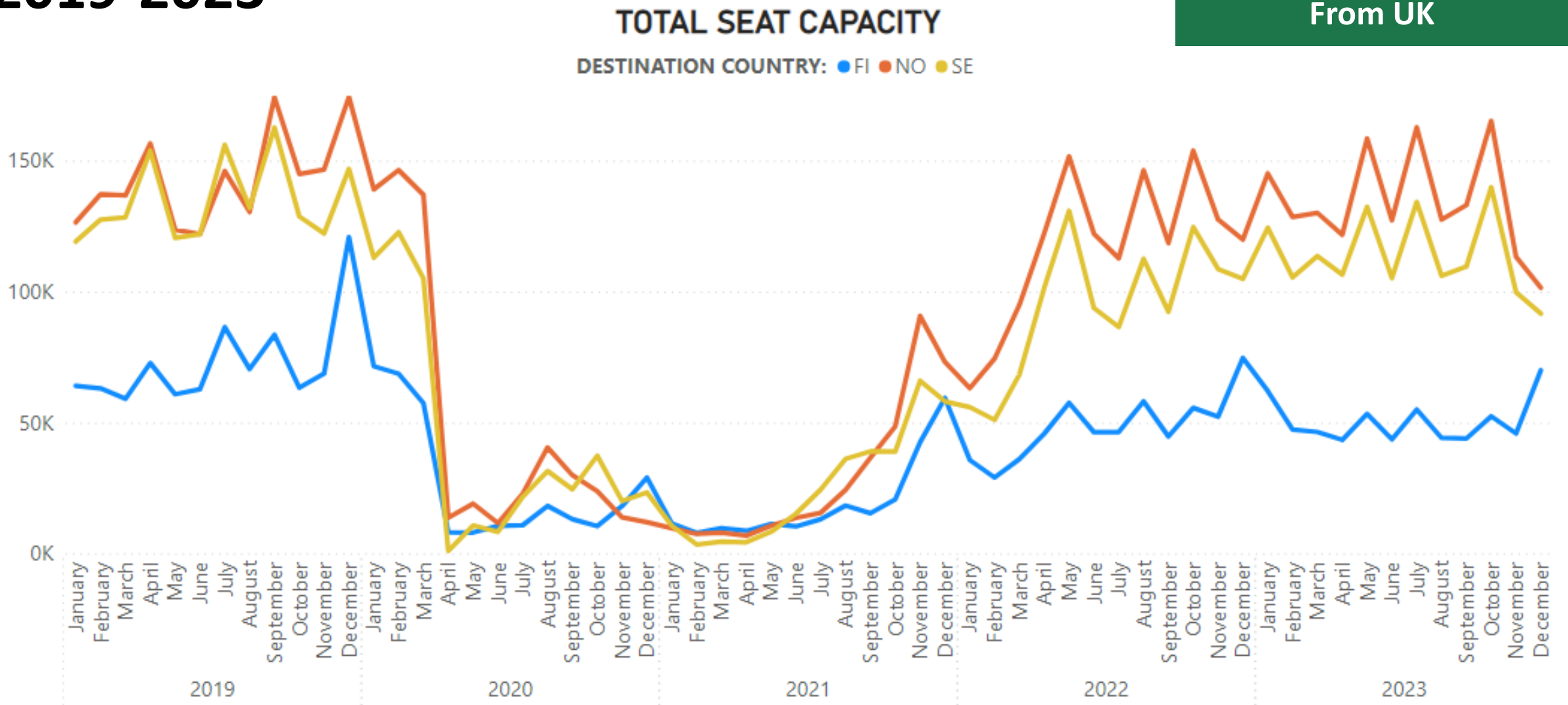


# Direct flights to FIN, SWE, NOR / April – September 2023

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 UK to FIN, SWE, NOR 2019-2023



# Seat capacity from UK to Finland / Apr-Sep 2023

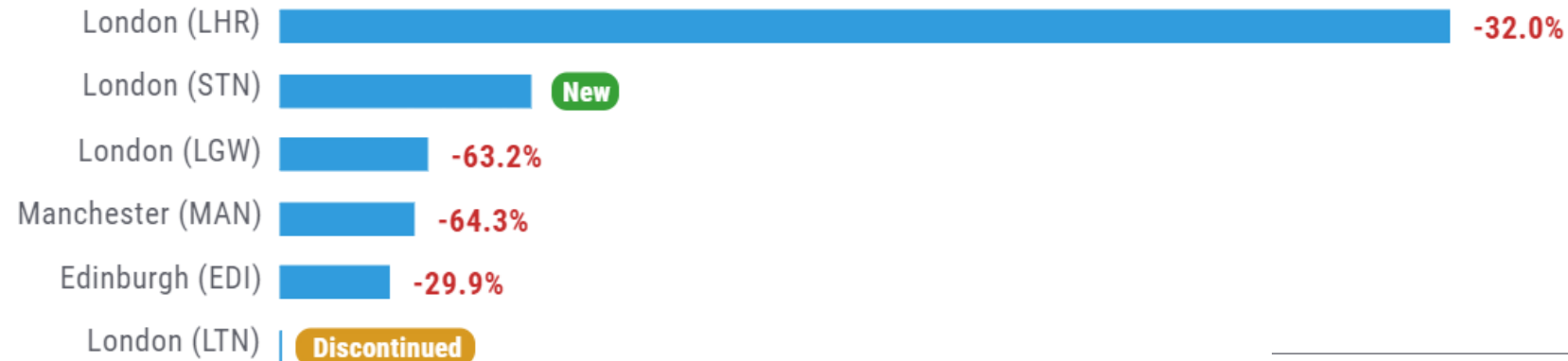
## Comparison to pre-pandemic

✈️ United Kingdom (excl. domestic) → Finland **Pre-pandemic analysis**

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

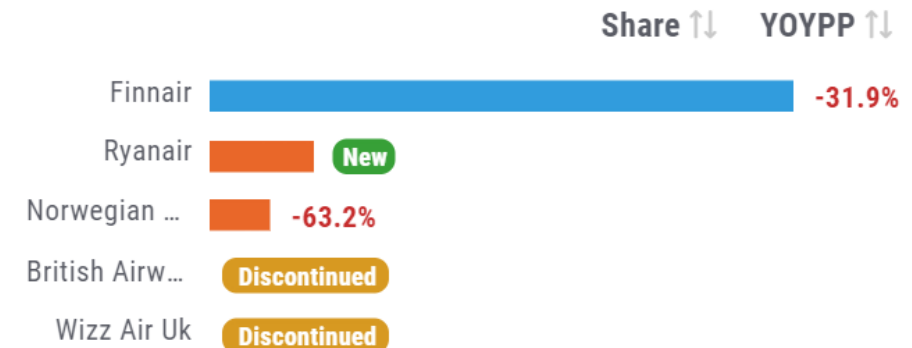
5 airports **-33.1%** YOYPP for selected locations

Seat capacity from UK to **Finland** will be **33% below** the pre-pandemic during spring-summer 2023



**-33.1%** YOYPP for selected airlines

- Finnair is flying four times a day from LHR to HEL, which is two flights less than pre-pandemic. BA has discontinued its flights to Finland.
- Finnair has daily flights from MAN to HEL, while it used to fly double daily in 2019.
- Finnair flies five times a week from EDI to HEL, which is also less than in 2019.
- Ryanair has 6 weekly flights from STN to HEL and 2 weekly flights from STN to TMP.
- Norwegian used to have double daily flights from LGW to HEL, but now only 5 flights a week.



# Seat capacity from UK to Sweden / Apr-Sep 2023

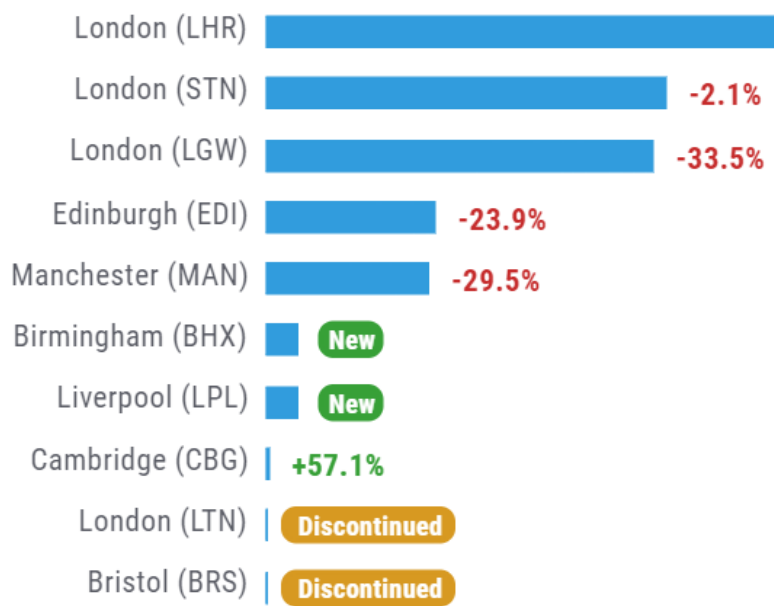
Comparison to pre-pandemic

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

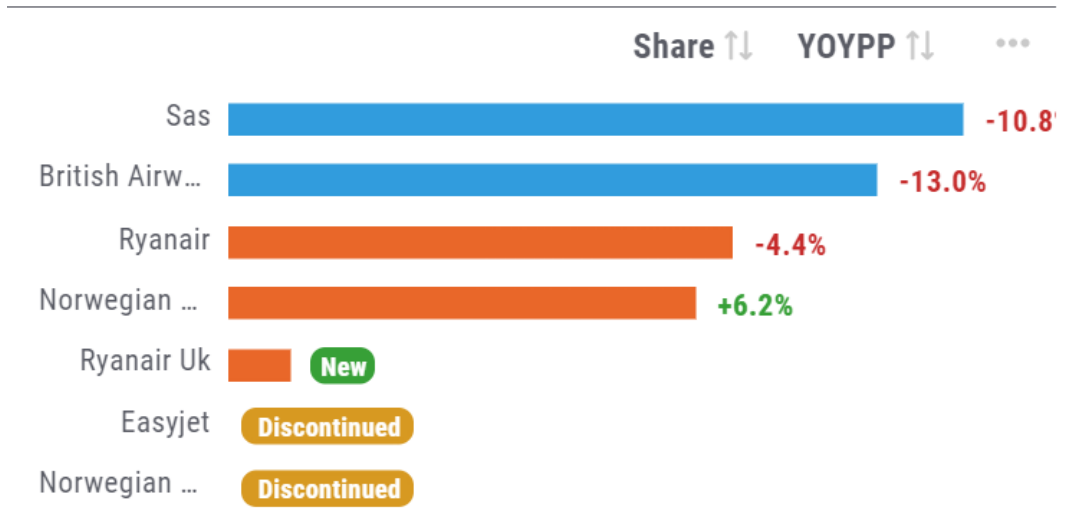
Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to the equivalent period in 2019

8 airports **-14.9%** YOYPP for selected locations

Seat capacity from UK to Sweden will be **15% below** the pre-pandemic during spring-summer 2023



**-14.9%** YOYPP for selected airlines



# Seat capacity from UK to Norway / Apr-Sep 2023

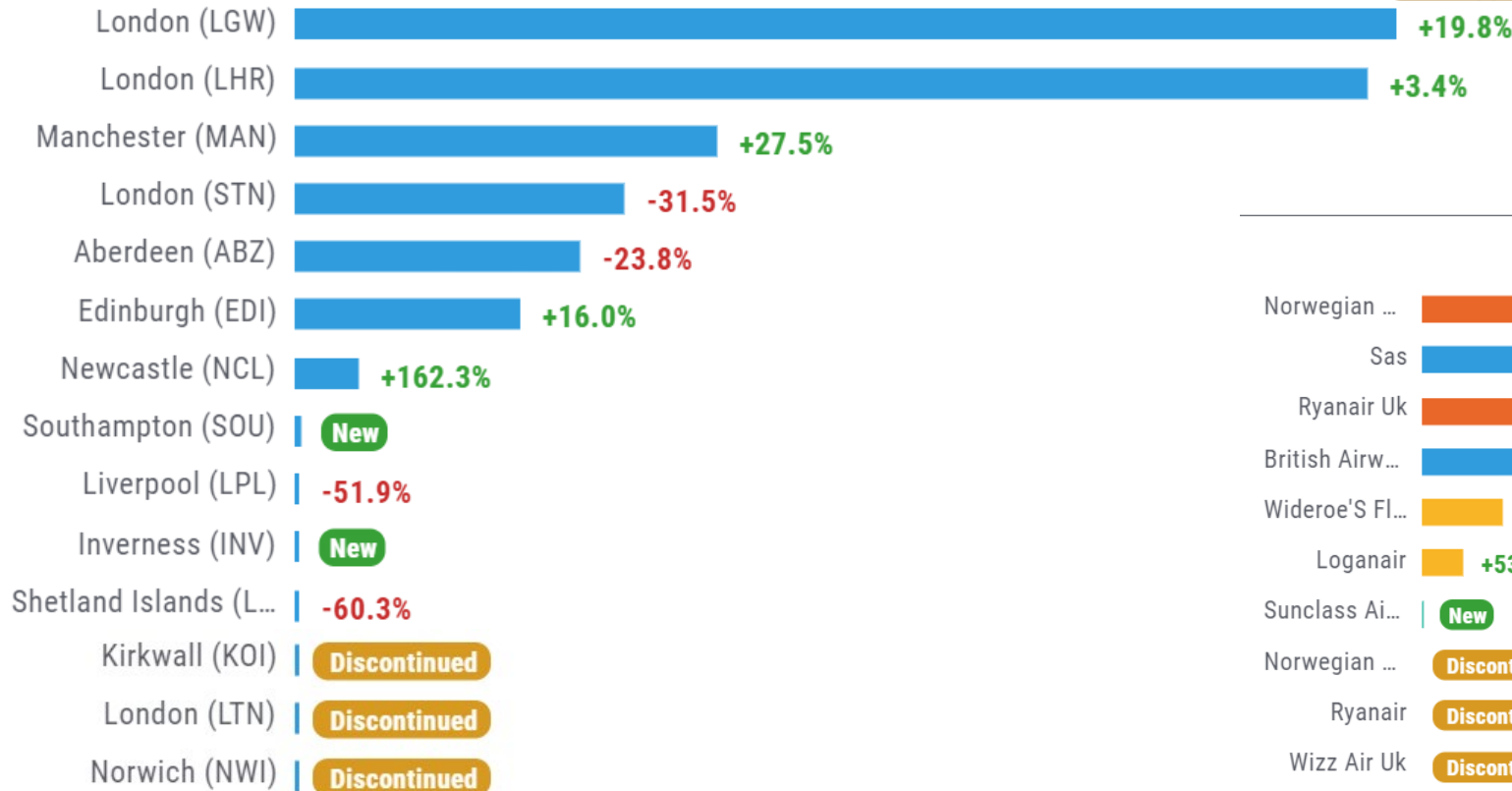
Comparison to pre-pandemic

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

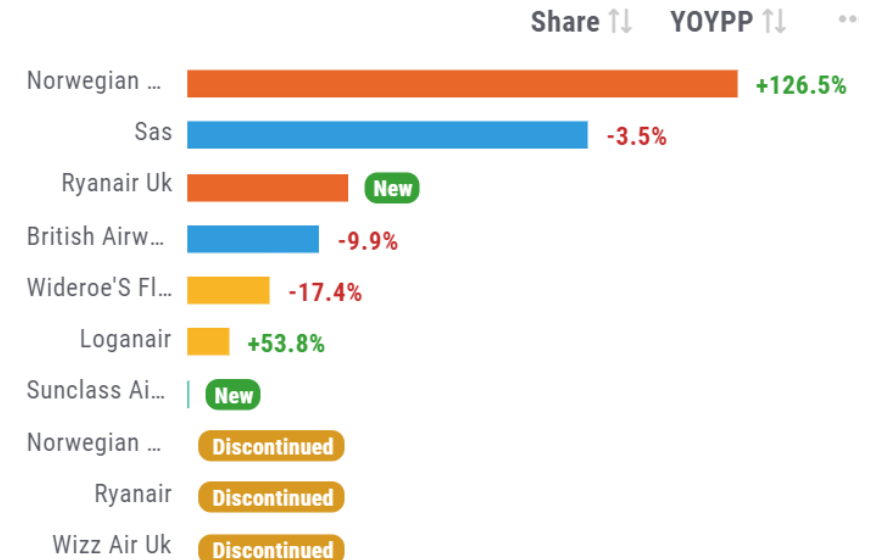
Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to the equivalent period in 2019

**11** airports **+1.3%** YOYPP for selected locations

Seat capacity from UK to Norway will be **1% above** the pre-pandemic during spring-summer 2023



**+1.3%** YOYPP for selected airlines





ForwardKeys

# Flight arrivals/bookings



# 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.

→ 23.4.

→ 14.5.

June-August

**Total int'l**

summer 2023 vs. 2019

-11%

-7%

-16%

-17%

**148,200**

No. of flight tickets\*

**Germany**

-12%

-10%

-7%

-8%

**25,000**

**USA**

-10%

-9%

+1%

+2%

**17,500**

**UK**

-14%

-14%

-25%

-25%

**13,000**

**Switzerland**

-21%

-19%

-19%

-17%

**10,300**

**France**

+32%

+36%

+32%

+31%

**9,400**

**Netherlands**

+15%

+28%

+21%

+20%

**7,000**

**Italy**

+4%

+8%

+1%

-1%

**5,700**

**Spain**

+34%

+60%

+49%

+40%

**5,400**

**Sweden**

+6%

+10%

-12%

-21%

**4,800**

**Japan**

-71%

-70%

-66%

-67%

**3,100**

**Hong Kong**

+67%

+92%

-75%

-72%

**1,000**

Please note! Ryanair 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 UK

## Comparison to pre-pandemic

- Bookings from UK to Finland for the summer months will remain below the pre-pandemic level.
- With better connectivity, Sweden and Norway seem to be recovering during the summer and will continue with the growth path also in autumn.

### Destination benchmark

YOYPP of tourist arrivals

Data updated 14-May

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



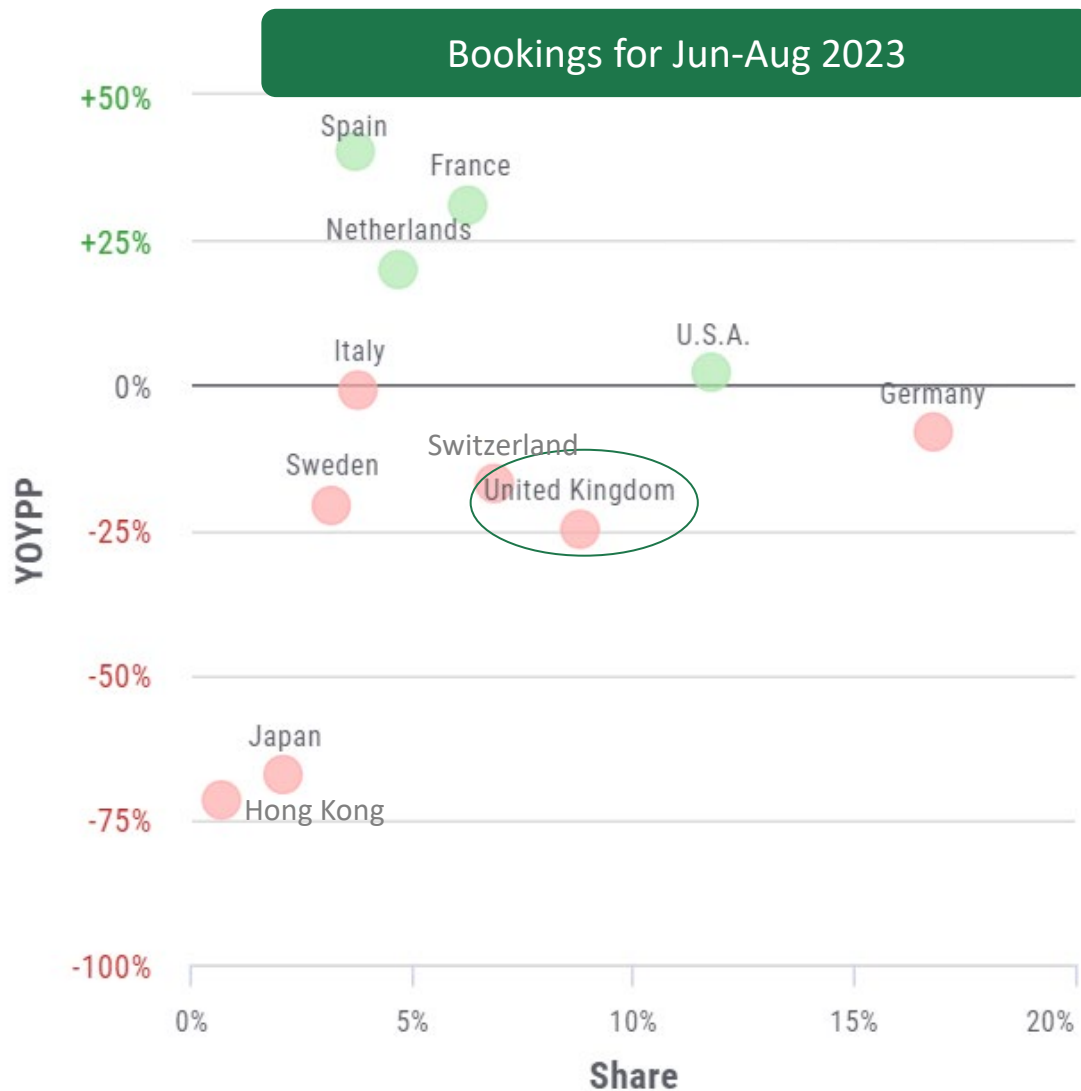
Including at least 1 night in destination.

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

Source: ForwardKeys Destination Gateway

# Flight bookings for summer 2023 (Jun-Aug)

Comparison with pre-pandemic



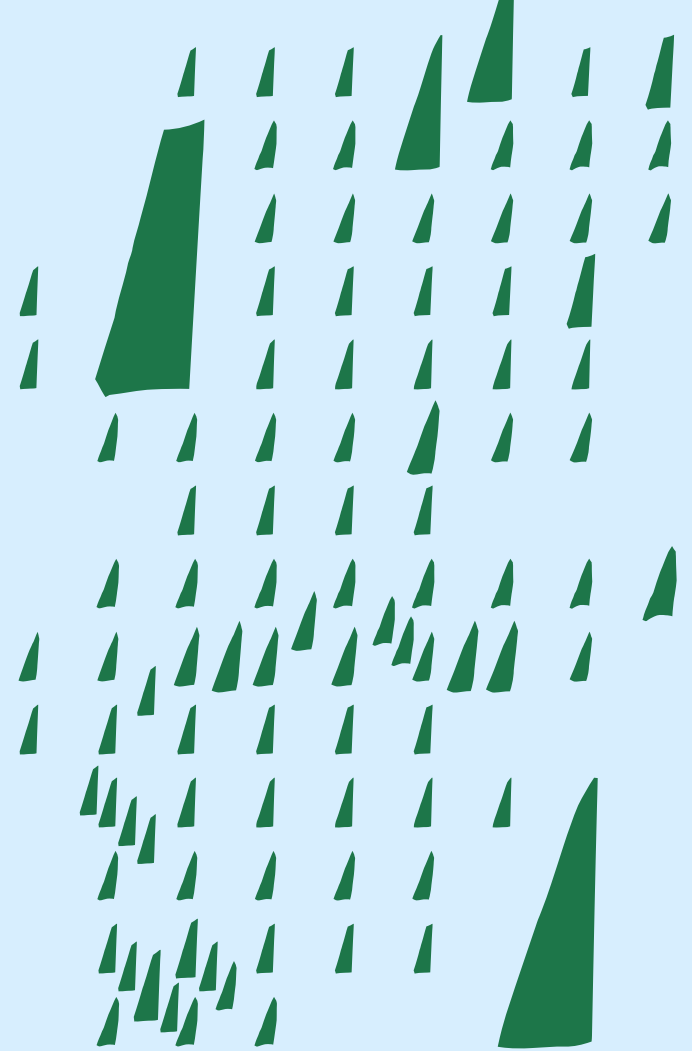
## UK - Bookings for Jun-Aug 2023

	June	July	August	Jun-Aug
<b>Finland</b>	5,100	5,000	2,900	<b>13,000</b>
<b>Sweden</b>	11,200	8,900	5,500	<b>25,600</b>
<b>Norway</b>	8,100	5,100	4,000	<b>17,200</b>
	June	July	August	Jun-Aug
<b>Finland</b>	-30%	-26%	-13%	-25%
<b>Sweden</b>	+6%	+9%	+5%	+7%
<b>Norway</b>	-3%	-2%	+11%	+1%

Including at least 1 night in destination.

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

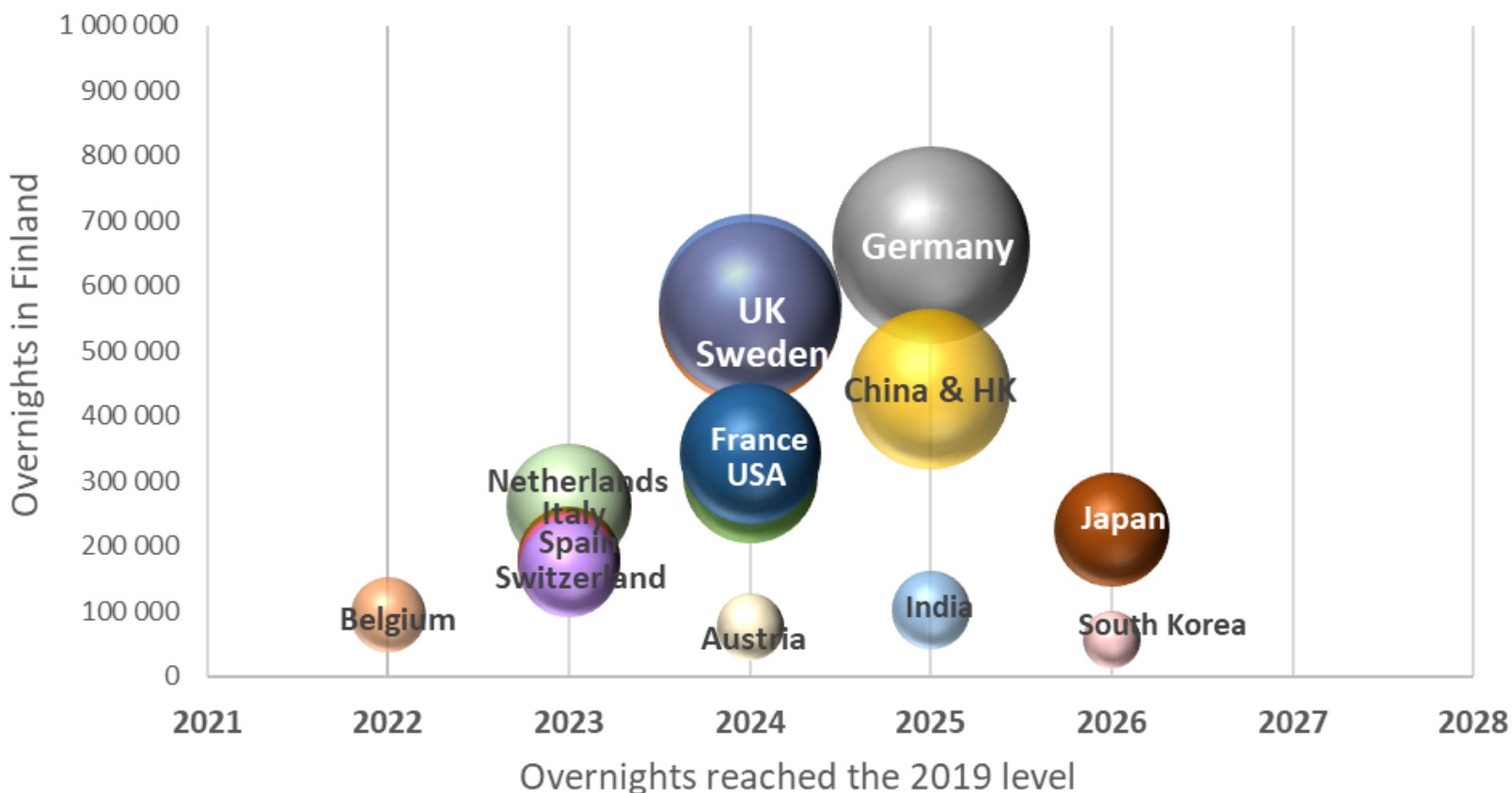
# Oxford Economics forecast for Travel Recovery



# Overnights – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Overnights in Finland reached the level of 2019



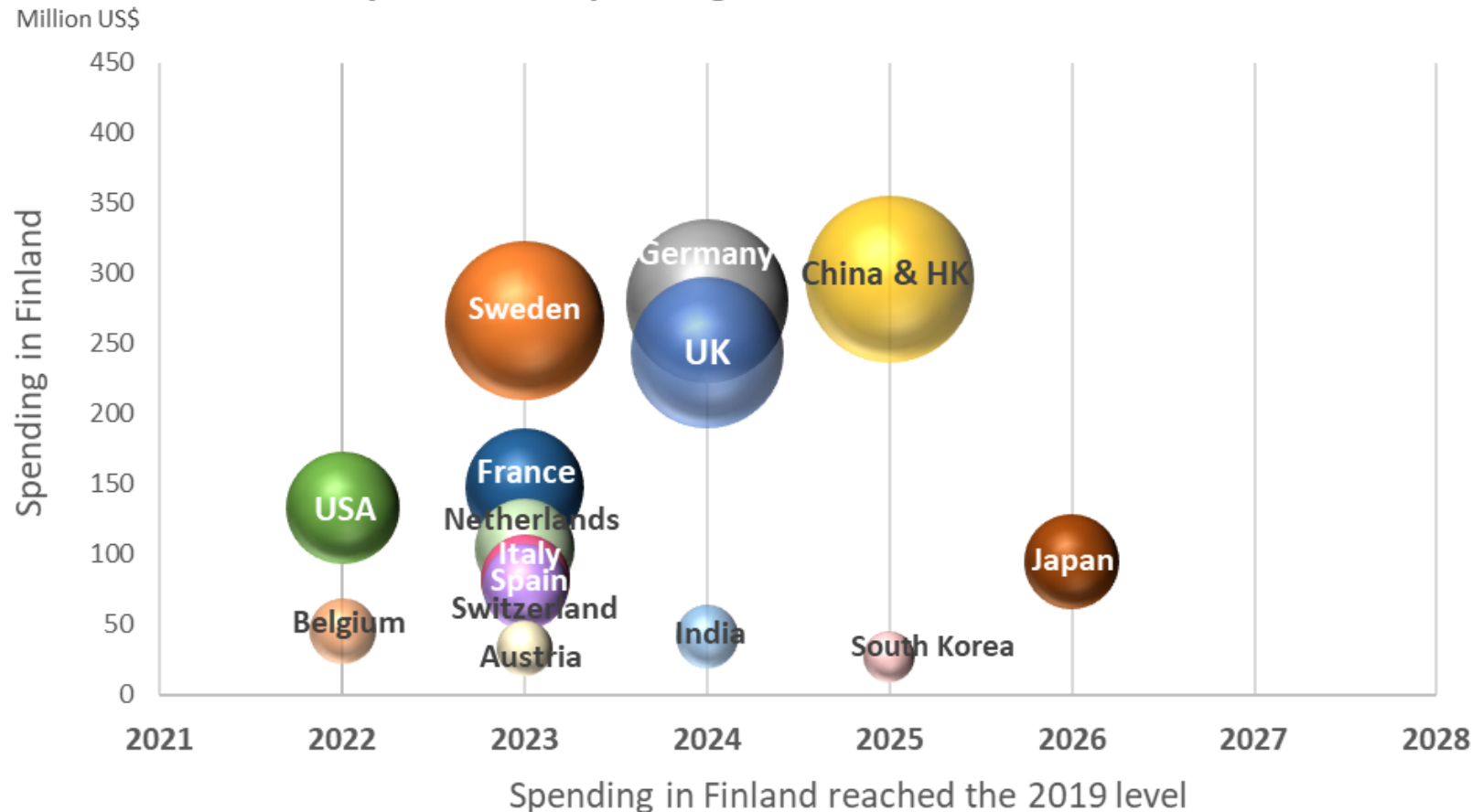
Source: Oxford Economics, databank update Mar 27, 2023

	No. of overnights in 2023	comp. to 2019
Germany	546 200	-17 %
Sweden	523 300	-6 %
UK	503 100	-12 %
France	329 900	-3 %
Netherlands	298 100	14 %
USA	290 400	-6 %
Italy	193 800	7 %
Spain	193 700	11 %
Russia*	180 200	-78 %
China	174 200	-61 %
Switzerland	167 700	1 %
Belgium	122 200	30 %
Japan	91 200	-59 %
Austria	74 000	-3 %
India	71 300	-30 %
South Korea	37 100	-34 %

# Spending – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Spending in Finland reached the level of 2019



Source: Oxford Economics, databank update Mar 27, 2023

	Spending (Million US\$) in 2023	comp.to 2019
Sweden	260,6	-2 %
Germany	225,2	-20 %
United Kingdom	212,1	-13 %
France	143,6	-2 %
United States**	124,3	-6 %
China	113,3	-62 %
Netherlands	113,3	9 %
Spain	89,6	9 %
Italy	88,8	10 %
Russia	79,2	-79 %
Switzerland	77,3	1 %
Belgium	57,9	28 %
Japan	35,7	-62 %
Austria	32,3	-2 %
India	30,9	-25 %
South Korea	19,4	-26 %

\*\* ) USA will recover to 2019 level in 2022, but will remain slightly below 2019 level in 2023

