



Visit Finland

VF monthly follow up

January – September 2024

Summary

Travel to Finland and to the Nordics compared to previous year and pre-pandemic

Border survey latest 12 months (Oct 2023 – Sep 2024)

- Foreign visitors made **4.7 million trips** to Finland during the **latest 12 months**, and they **spent 3.7 billion euros in Finland**. **Median length of stay was 4 nights** and **73%** of the visitors were travelling for **leisure purposes**.
 - **Estonia, Sweden, Germany, and UK** were the biggest source markets by the number of **trips made to Finland**.
 - **Germany, Estonia, USA, UK, and France** are biggest contributors in **total spending in Finland**.
 - Visitors from **Austria and Estonia** have the best **carbon efficiency rate (€/CO2)**.

Registered overnights in Finland Jan-Sep 2024

- Number of registered **foreign overnights** in **Jan-Sep 2024** were **9% above** the figures of previous year, but *14% below pre-pandemic*. The biggest source markets were **Germany, Sweden, USA, France, UK, and the Netherlands**.
 - **45%** of the foreign overnights took place in the **Helsinki region** and **nearly 30%** in **Lapland region**. There was a positive development in overnights in each region except Lakeland compared to previous year, but *only Lapland region has surpassed the level of Jan-Sep 2019*.
- In **September 2024**, registered foreign overnights **decreased slightly** compared to previous year and *remained 23% lower than in Sep 2019*.
 - **Nearly half** of the overnights were spent in **Helsinki**.
 - **Lapland region surpassed clearly the level of overnights in Sep 2019**.

Short-term rentals in Finland year 2023 and H1-2024

- In **2023**, foreign overnights in **short-term rentals** was **2.1 million**, so the total number of **foreign paid overnights** added up to **7.8 million**.
- The share of foreign overnights in short-term rentals was already **26% in 2023**, and during the **first half of 2024** it was **28%**.

Summary

Travel to Finland and to the Nordics compared to previous year and pre-pandemic

Registered overnights in the Nordics Jan-Sep 2024

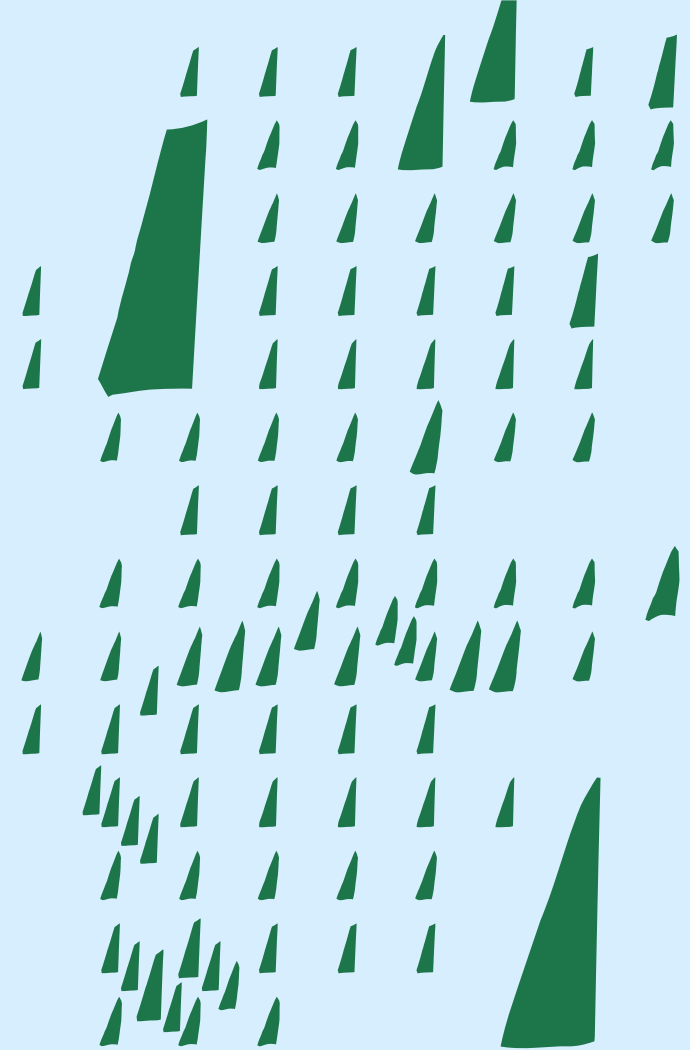
- **Total number of registered foreign overnights** during Jan-Sep 2024 was over **45 million**, which was **7% more** than same period last year and *also 7% more than in 2019*.
 - **Finland's share** of foreign overnights has **decreased** from *13% in Jan-Sep/2019* to **10%** in Jan-Sep/2024.
- In **September 2024**, foreign overnights were highest in **Denmark** (1.3M; YoY +12%, vs. 2019 +37%), **Sweden** (1.2M; +11%, +12%), and **Norway** (0.8M; +17%, +25%). **Iceland** and **Finland** had smaller volumes (0.5M and 0.4M respectively), and in both countries the number of foreign overnights remained below both Sep/2023 and Sep/2019 figures.

Flight capacity and bookings for the winter season

- Flight **capacity** for the winter season is improving to **Finland** and **Norway** compared to previous winter and the capacity is *also very close to the level of winter 2019*. Current situation with the **bookings** shows even **stronger growth** than the growth with the flight capacity for **Finland** and **Norway**.
 - In **Sweden**, the **capacity** remains at the **same level than last winter**. **Bookings** are above the level of last year and pre-pandemic, but they are not growing as strongly as to Finland and Norway.
- **Seat capacity to Finland** is **improving** both compared to previous winter and winter pre-pandemic from **Europe** and **USA**. *Capacity from Asia is still 30% below pre-pandemic level.*
- **Bookings to Finland** are **increasing** from several source markets compared to both previous year and pre-pandemic. Flight reservations for the winter season are highest from **Germany, UK, France, USA, and Switzerland**.

Border Survey

Latest 12 months (Oct/2023 – Sep/2024)



Border Survey / Latest 12 months (Oct 2023 – Sep 2024)

Foreign visitors in Finland

[Link to the report: Matkailijamittari - Visit Finland](#)

Personal/leisure

trips **3,397K** (73% of total trips) & spending of **2,607M€** (71% of total spending)

- **46%** of total trips & **47%** of total spending vacation/recreation
- **22%** & **15%** visiting friends/relatives
- **2%** & **7%** study

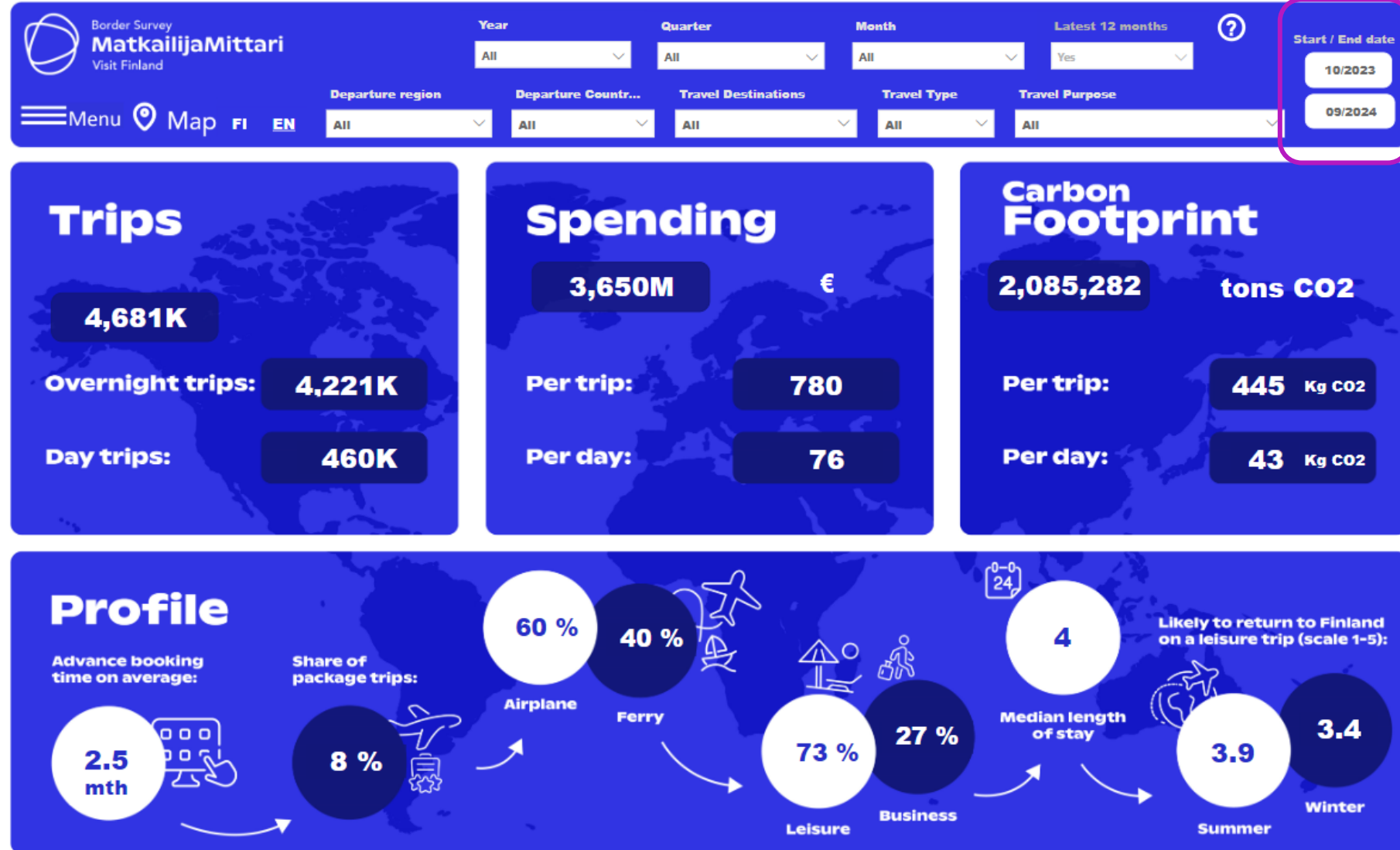
Work related

trips **1,243K** (27% of total trips) & spending of **1,003M€** (27% of total spending)

- **9%** of total trips & **11%** of total spending work performed in FI (Finnish employer)
- **8%** & **7%** meeting/work trip (non-Finnish employer)
- **4%** & **4%** conference, congress, fair

Highest carbon efficiency (€/CO2)

- Work performed in FI (FI employer) **2,0**
- Conference, congress, fair **1,9**
- Vacation/recreation **1,9**



Border Survey / Latest 12 months (Oct 2023 – Sep 2024)

Foreign visitors in Finland

[Link to the report: Matkailijamittari - Visit Finland](#)

Top5 source markets for leisure/personal trips

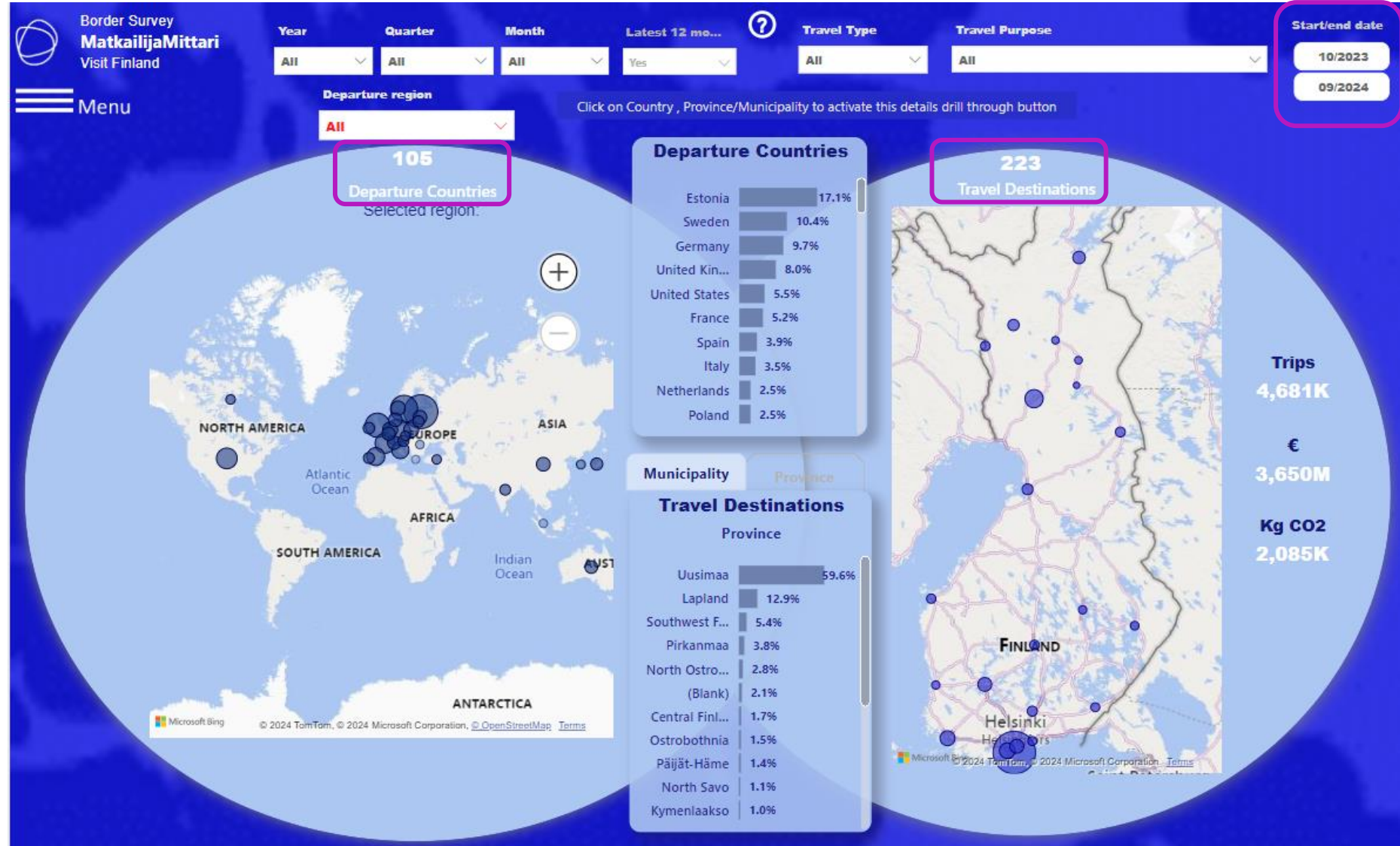
Estonia, Germany, Sweden, UK, USA

- Biggest **spend/day**: Singapore, Japan, Austria, Australia
- Longest **median length of stay**: Canada, Belgium, France, Netherlands

Top5 source markets for work related trips

Estonia, Sweden, UK, Germany, Poland

- Biggest **spend/day**: Germany, Norway, Netherlands, UK, Sweden, USA
- Longest **median length of stay**: Latvia, Poland, Estonia, France, Italy, Spain, USA



Foreign registered overnights & flight statistics

Compared to corresponding period in *previous year* (& 2019)

*) Flight bookings including at least 1 night stay in Finland.

Registered overnights

Flight arrivals / bookings*

Seat capacity

Monthly view

669,400

+11% (-15%)

Sep/24 foreign overnights in FIN



97,500

+15% (-27%)

Oct/24 int'l flight arrivals (incl. low-cost carriers) to FIN



98,800

+13% (+3%)

Nov/24 outlook for int'l flight bookings to FIN



900,600

+9% (-17%)

Oct/24 flight seat capacity to FIN



806,800

+9% (-14%)

Nov/24 outlook for seat capacity to FIN



Several months' view

4.2M

+10% (-13%)

01-09/24 foreign overnights in FIN



730,000

+8% (-26%)

05-10/24 (6 mths) arrivals (incl. low-cost carriers) to FIN



313,200

+17% (+9%)

11/24 – 04/25 (6 mths) outlook for flight bookings to FIN



5.5M

+11% (-18%)

05-10/24 (6 mths) flight seat capacity to FIN



5.3M

+14% (-7%)

11/24 – 04/25 (6 mths) outlook for seat capacity to FIN



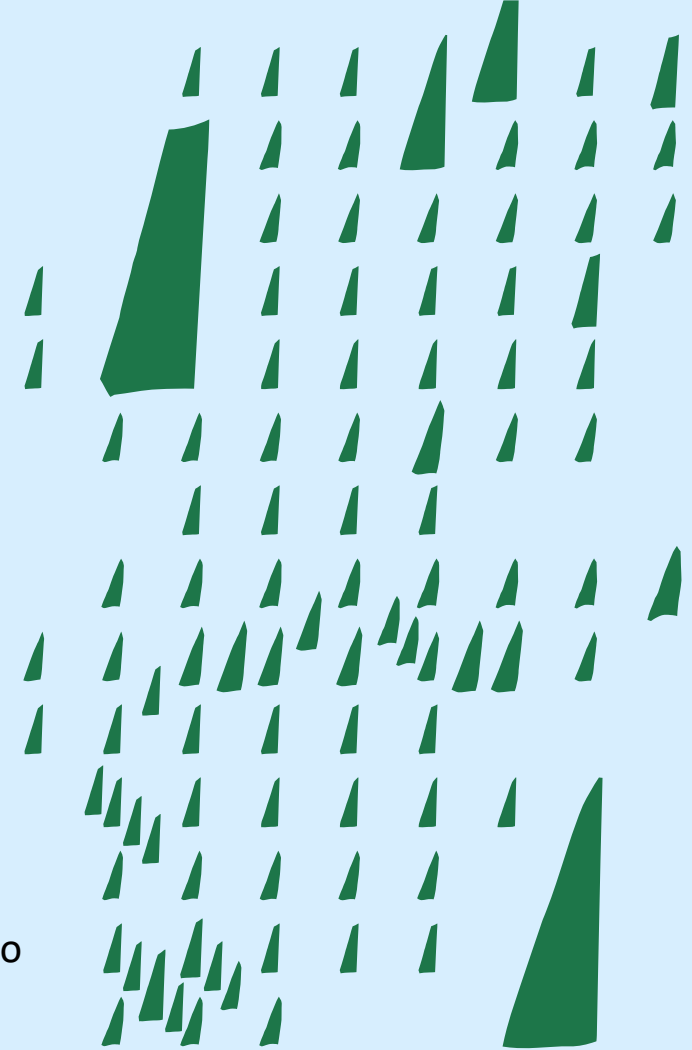
Registered overnights

- January – September 2024

- Foreign overnights increased by **9%** compared to previous year but remained 14% below the level of 2019. The biggest source markets were **Germany, Sweden, USA, France, UK, and the Netherlands**.
- Total accommodation revenue remained at the same level as last year. Foreign revenue increased by **13%**, but domestic revenue decreased by 5%.

- September 2024

- Foreign overnights: **400,100** (-3% vs. 09/2023 & -23% vs. 09/2019)
- Top source markets: **Germany, Sweden, USA**
 - Among the top10 source markets, overnights increased in September both compared to previous year as well as to 2019 from **Germany, USA, Spain, and Switzerland**
- Main destinations: **Helsinki, Vantaa, Rovaniemi**
 - Among the main destinations, foreign overnights increased in September both compared to previous year as well as to 2019 in **Rovaniemi, Inari-Saariselkä, and Oulu**.



Registered overnights Jan-Sep 2024

	Jan-Sep 2024	Change-% vs. Jan-Sep 2023	Change-% vs. Jan-Sep 2019
Total	17.6M	-2%	-3%
Domestic	13.0M	-5%	+2%
Foreign, total	4.6M	+9%	-14%
Foreign excl. Russia	4.6M	+9%	-2%
Scandinavia	686,800	+5%	-5%
EU-27 + UK	2.9M	+5%	+3%
America	439,700	+12%	+26%
Asia	567,500	+28%	-37%

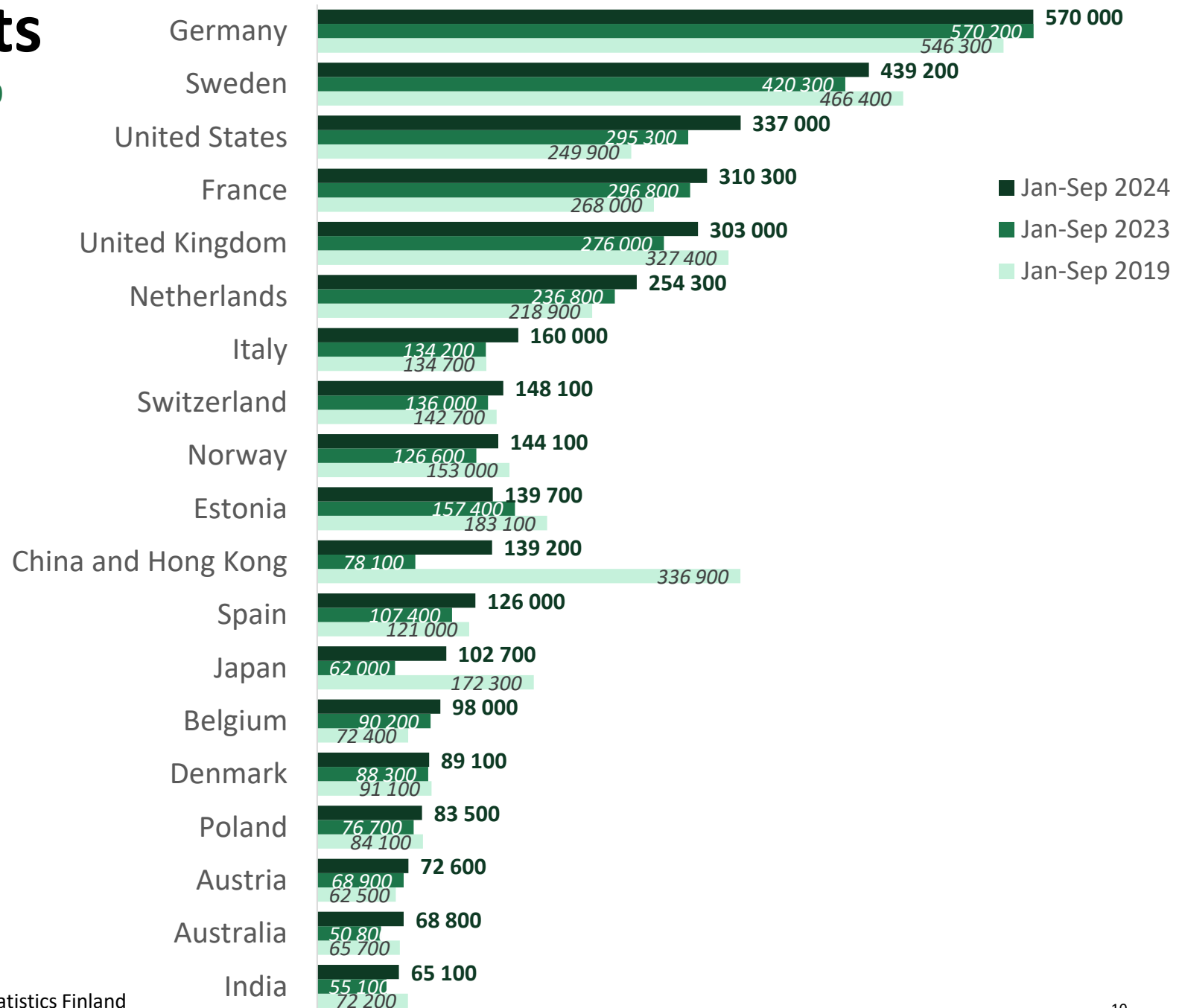


Biggest source markets

Jan-Sep 2024 vs. Jan-Sep 2023 & Jan-Sep 2019

During Jan-Sep 2024, number of overnights are the same or have exceeded both previous year and 2019 figures from these biggest source markets:

- **Germany**
- **USA**
- **France**
- **Netherlands**
- Italy
- Switzerland
- Spain
- Belgium
- Austria
- Australia





January – September 2024

Year: 2018 2019 2020 2021 2022 2023 **Latest**

Year month: Jan Feb Mar Apr May Jun Jul Aug Sep

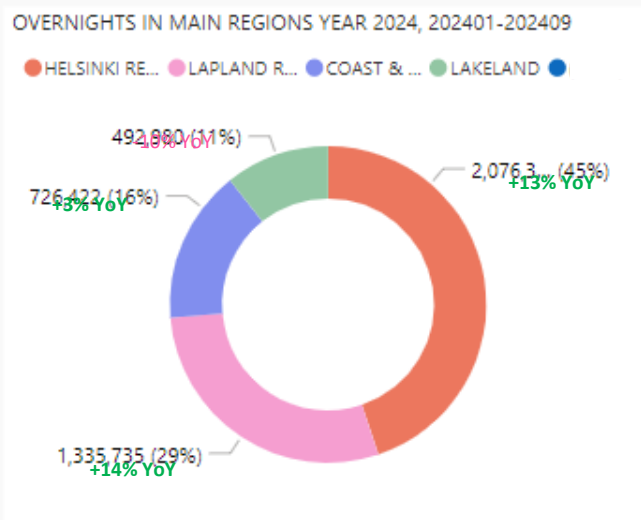
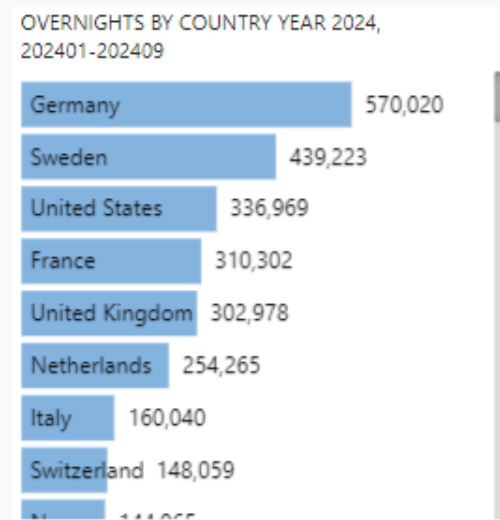
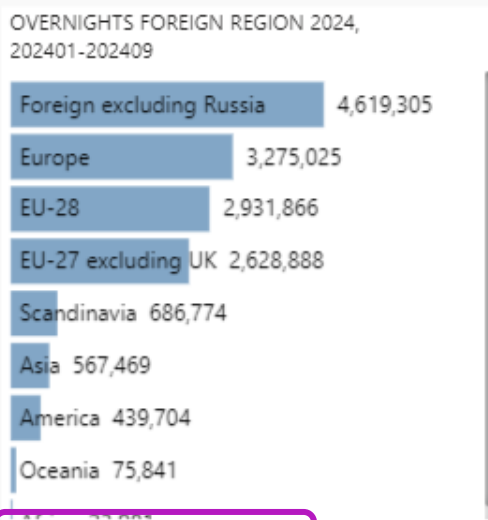
Overnights 17.6M TOTAL overnights	YoY change % -2 YoY change %	Foreign 4.6M Overnights	YoY change % 8.7 Foreign	Domestic 13.0M Overnights	YoY change % -5 Domestic	Revenue 1.1bn TOTAL revenue	YoY change % 0 YoY change %
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[VIEW REVENUE DETAILS](#) [VIEW OVERNIGHT DETAILS](#)

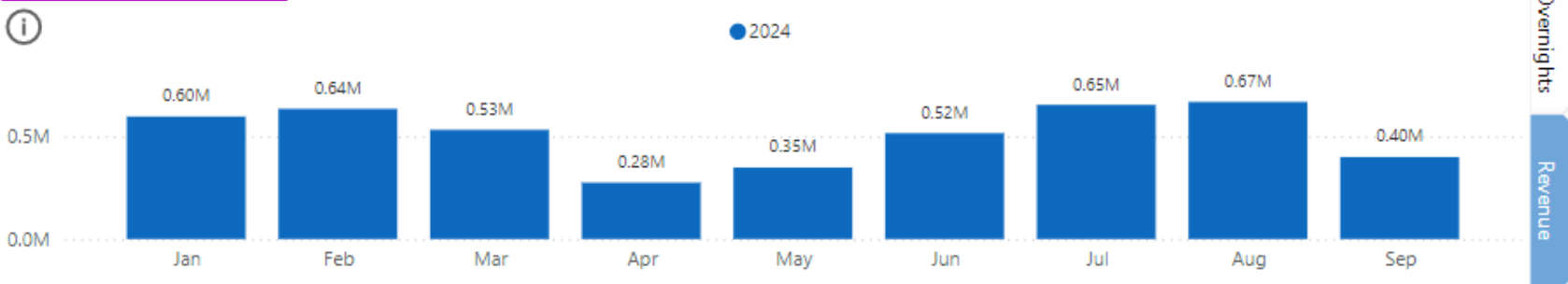
View Main regions, Regions by

Domestic Foreign

REGIONAL OVERNIGHTS



FOREIGN OVERNIGHTS 2024



Sources: Statistics Service Rudolf, Statistics Finland

Year

2018 2019 2020 2021 2022 **2023** Latest

Year month

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Main area: All
Region: All
Sub-region: All
Municipality: All

REVERT TO DEFAULT

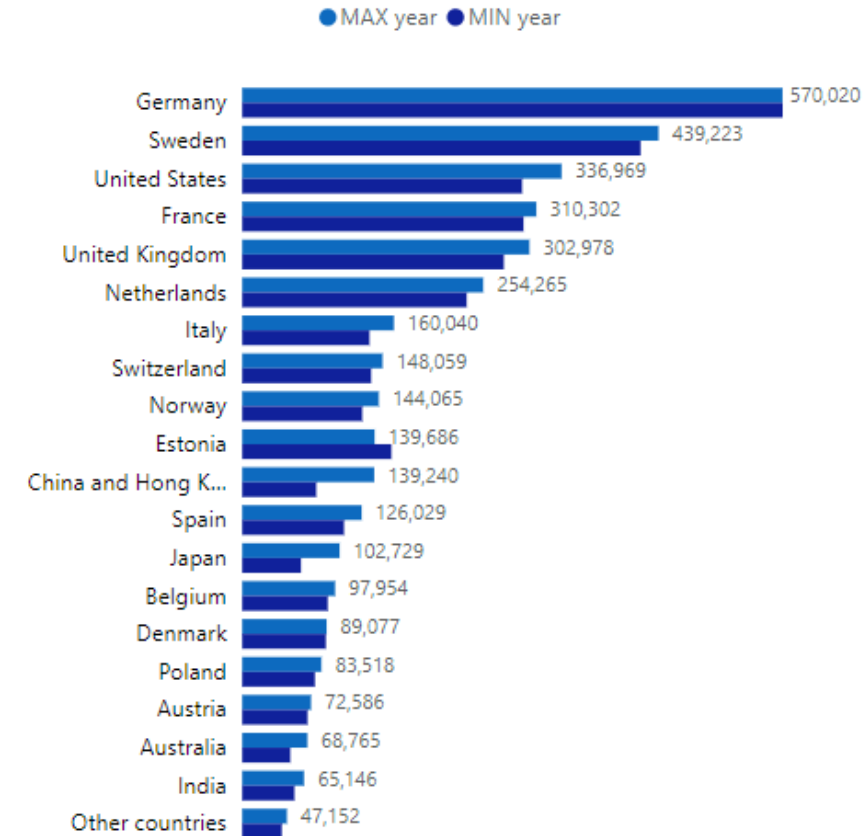
REGION VIEW

FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2024 compared to 2023 months 1-9

Main area	2024	2023	Change %
	MAX year	MIN year	
HELSINKI REGION	2,076,338	1,843,446	12.6
LAPLAND REGION	1,335,735	1,169,174	14.2
COAST & ARCHIPELAGO	726,422	703,185	3.3
Åland	186,997	191,425	-2.3
Southwest Finland	155,187	160,021	-3.0
North Ostrobothnia (excl. Kuusamo)	147,885	119,147	24.1
Uusimaa 2 (excl. Helsinki Metropolitan Area)	69,700	69,559	0.2
Ostrobothnia	59,884	63,321	-5.4
Satakunta	49,588	38,706	28.1
South Ostrobothnia	23,949	26,846	-10.8
Kymenlaakso	21,066	21,381	-1.5
Central Ostrobothnia	12,166	12,779	-4.8
LAKELAND	492,980	546,830	-9.8
Pirkanmaa	147,357	175,425	-16.0
Central Finland	80,407	89,059	-9.7
South Savo	63,650	54,999	15.7
Päijät-Häme	48,649	63,030	-22.8
North Savo	48,220	51,133	-5.7
North Karelia	33,780	33,045	2.2
Kainuu	31,796	31,048	2.4
South Karelia	24,762	29,997	-17.5
Kanta-Häme	14,359	19,094	-24.8
Total	4,631,475	4,262,635	8.7

OVERNIGHTS 2024 compared to 2023 months 1-9



Sources: Statistics Service Rudolf, Statistics Finland

Top destinations by the number of foreign registered overnights during Jan-Sep 2024 (vs. Jan-Sep 2023):

- Helsinki (+16%)
- Rovaniemi (+9%)
- Vantaa (+10%)
- Inari-Saariselkä (+21%)
- Kittilä-Levi (+13%)
- Åland (-2%)
- Tampere (-17%)
- Kolari-Ylläs (+4%)
- Turku (-9%)
- Espoo (-14%)
- Ruka-Kuusamo (+34%)
- Oulu (+35%)

Foreign registered overnights in September 2024

September 2024

400,100 total foreign overnights; **-3%** vs. 09/2023, **(-23%** vs. 09/2019)

398,900 foreign excl. Russia; **-2%**, **(-16%)**

220,100 EU+UK; **-7%**, **(-14%)**

64,300 Scandinavia; **-5%**, **(-8%)**

63,400 Asia; **0%**, **(-44%)**

50,200 America; **0%**, **(+20%)**

Top destinations

total foreign; vs. 09/2023, (vs. 09/2019)

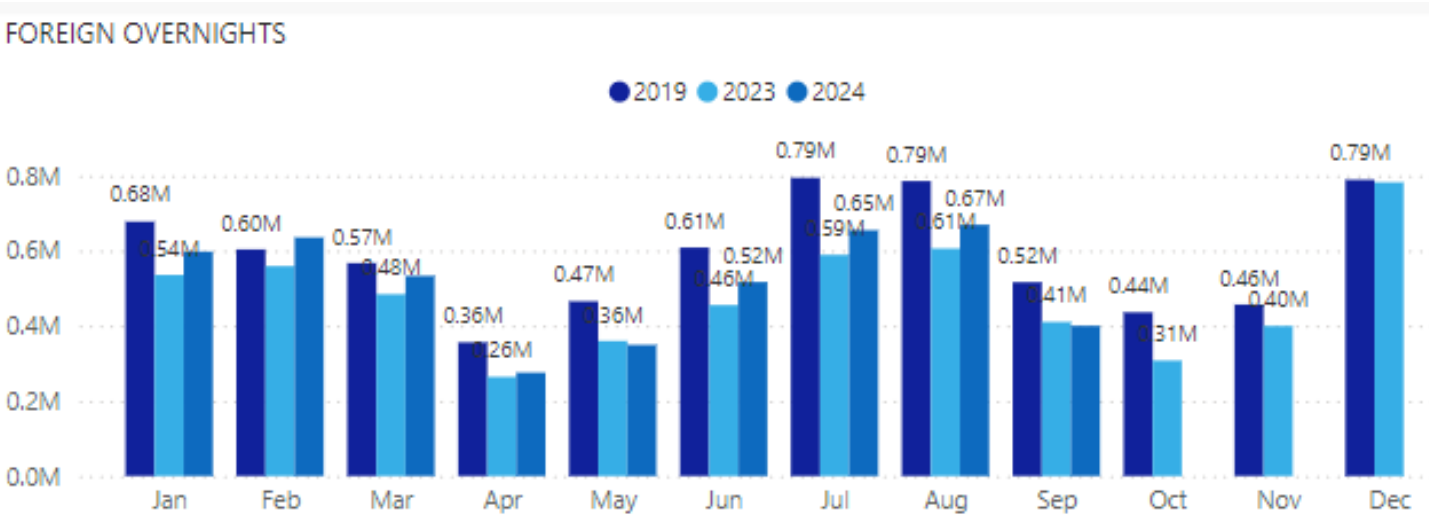
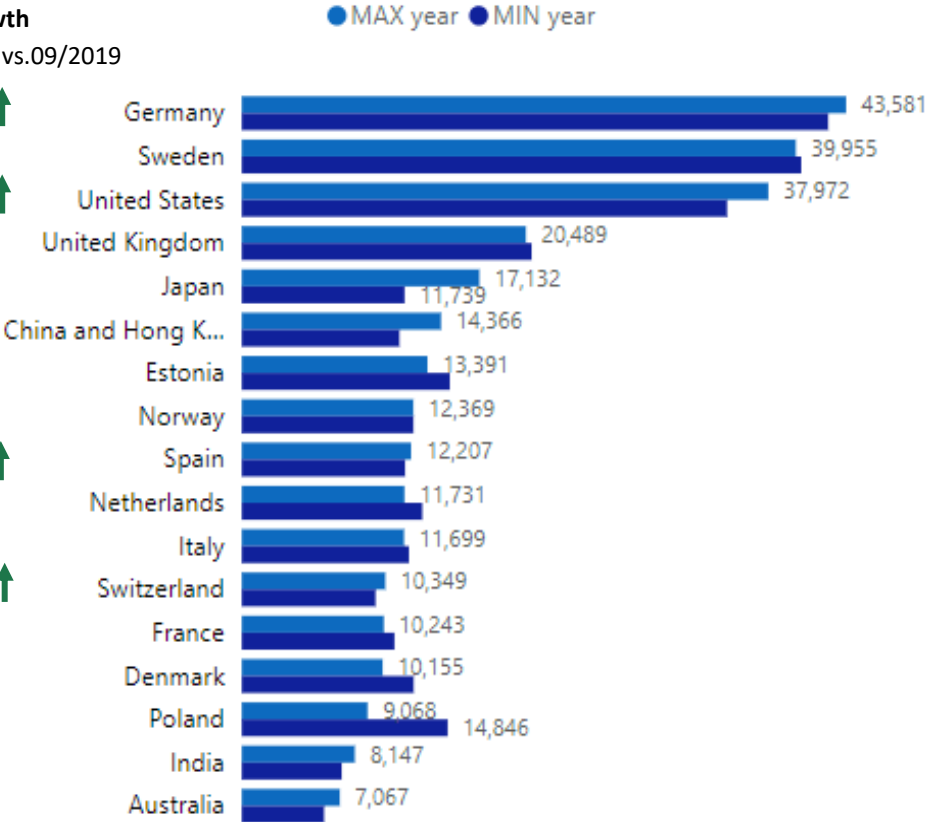
- **195,500 Helsinki; +4%, (-16%)**
- **31,300 Vantaa; +6%, (-30%)**
- **19,100 Rovaniemi; +58%, (+73%)**
- **15,800 Espoo; 0%, (-20%)**
- **15,100 Åland; -4%, (-12%)**
- **14,400 Tampere; -41%, (-10%)**
- **11,500 Turku; -57%, (-41%)**
- **9,000 Inari-Saariselkä; +33%, (+12%)**
- **7,900 Oulu; +49%, (+11%)**

Top source markets, total foreign; vs. 08/2023

OVERNIGHTS 2024 compared to 2023 months 9-9

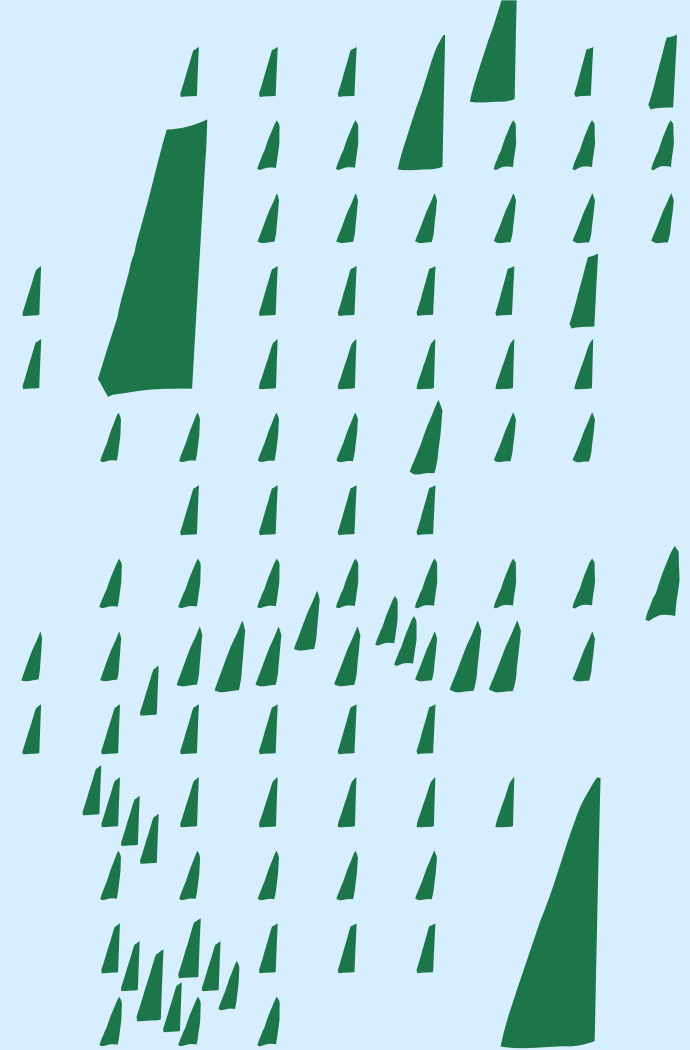
Growth

YoY/ vs.09/2019



Overnights in short-term rentals

- The importance of **short-term rentals via international platforms** has clearly increased during the latest years.
- In **2023**, **foreign overnights** in short-term rentals added up to **2.1 million**, so the total number of **foreign paid overnights** was **7.8 million**.
- The share of foreign overnights in short-term rentals was already **26% in 2023**, and during the **first half of 2024** it was **28%**.
 - Number of foreign overnights in short-term rentals are following the same pattern than registered overnights – **biggest increases are in winter months**.
 - **Rovaniemi** has the biggest share of short-term rentals from the total foreign paid overnights. Last year it was already nearly **40%** with a **year-on-year growth rate** as high as **74%**.



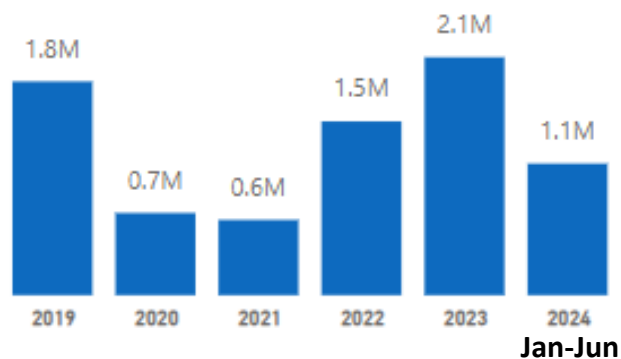
Foreign overnights in short-term rentals

(Airbnb, Booking.com, Tripadvisor, and Expedia Group)

- Number of **foreign overnights in short-term rentals** exceeded the 2019 level already in 2023.
- The first half of this year shows that the use of short-term rentals keeps growing strongly especially during the winter season.

OVERNIGHTS - 5 years

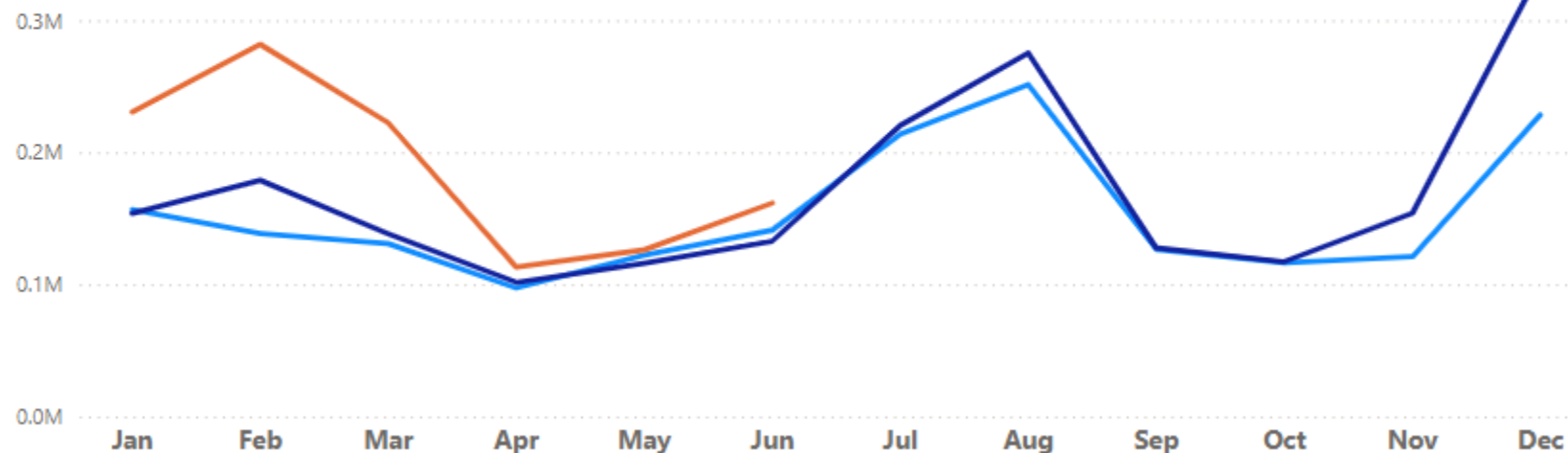
Selected: Foreign



OVERNIGHTS

Selected: Foreign

● 2019 ● 2023 ● 2024

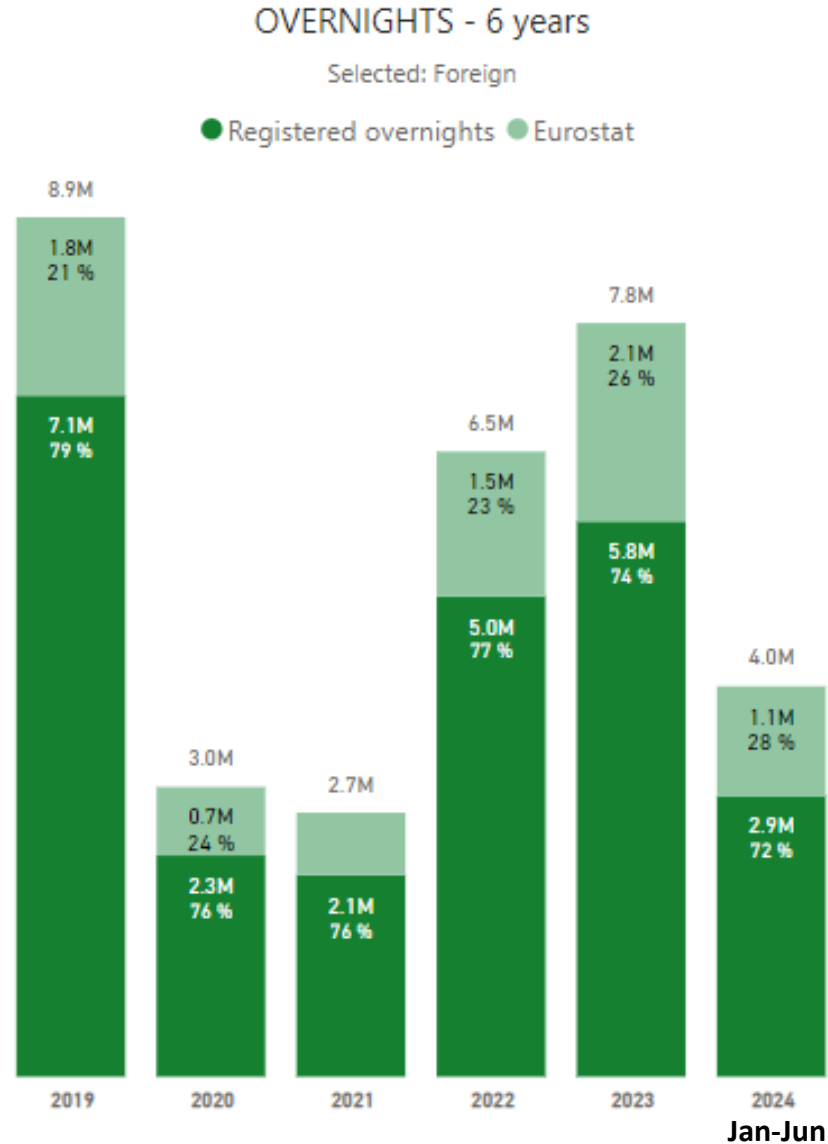


Foreign total paid overnights in Finland

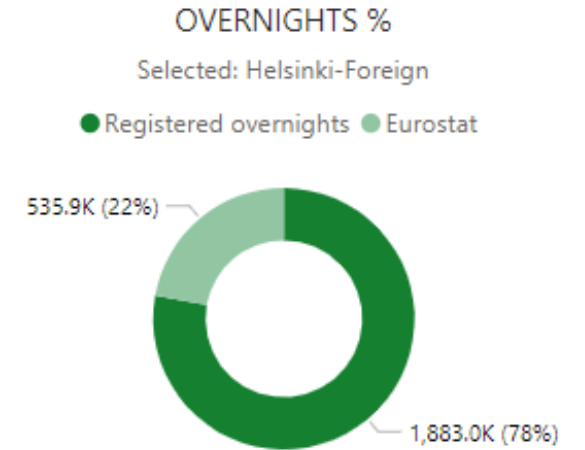
(Registered overnights + overnights in short-term rentals)

The share of short-term rentals is growing, and **last year** it was already **26%** of the foreign total paid overnights in Finland. During the **first half of this year**, the share of short-term rentals was **28%**.

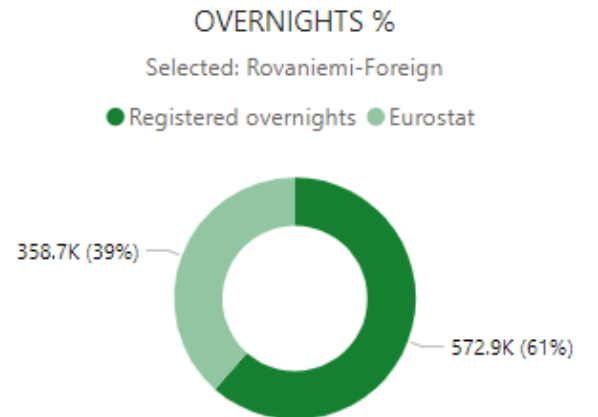
Helsinki and **Rovaniemi** were clearly the most popular destinations by the number of foreign paid overnights. Last year, the share of foreign overnights in short-term rentals in **Rovaniemi** was already **nearly 40%** and in **Helsinki 22%** of the total paid overnights.



2023 foreign paid overnights in Helsinki



2023 foreign paid overnights in Rovaniemi



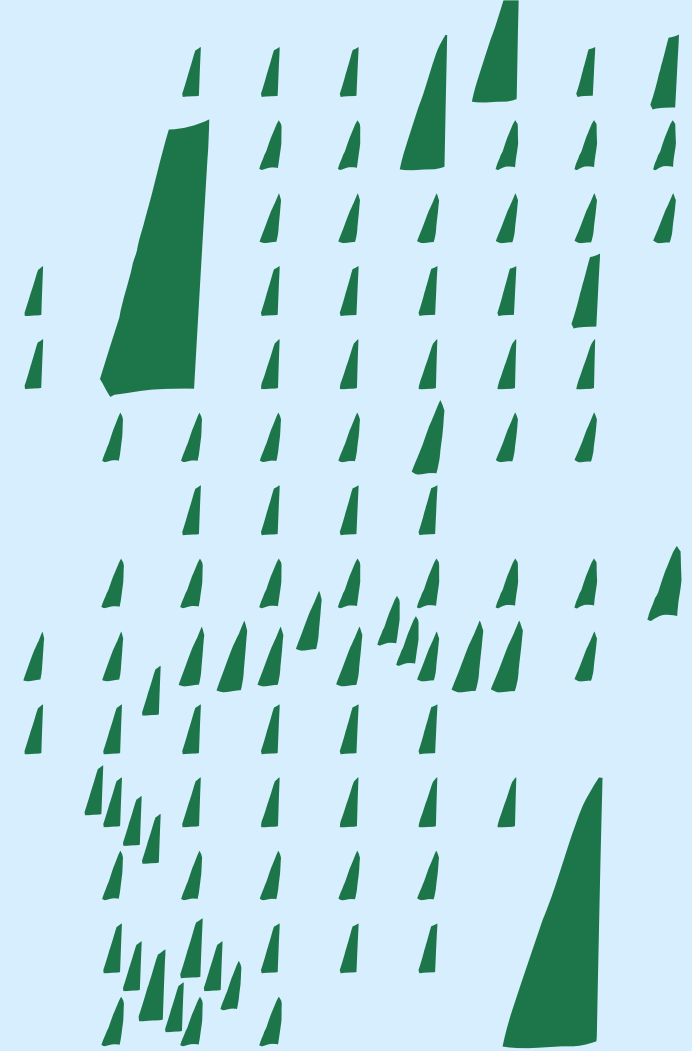
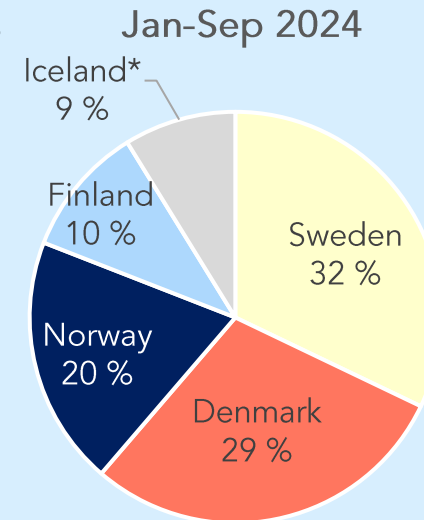
Registered overnights in the Nordics

Jan-Sep 2024

- **Total number** of foreign overnights was over **45 million**, which was **7% more** than the same period last year and also **7% more than in 2019**.
 - **Finland's** share has decreased from 13% in 2019 to **10% in 2024**.

Overnights, million	Jan-Sep 2019	Jan-Sep 2023	Jan-Sep 2024	Change 2024 vs. 2019	Change 2024 vs. 2023
Sweden	13,7	13,2	14,5	6 %	9 %
Denmark	10,9	12,4	13,2	21 %	6 %
Norway	8,2	8,2	8,9	8 %	9 %
Finland	5,4	4,3	4,6	-14 %	9 %
Iceland*	4,1	4,2	4,0	-3 %	-6 %
Nordics, total	42,2	42,3	45,1	7 %	7 %

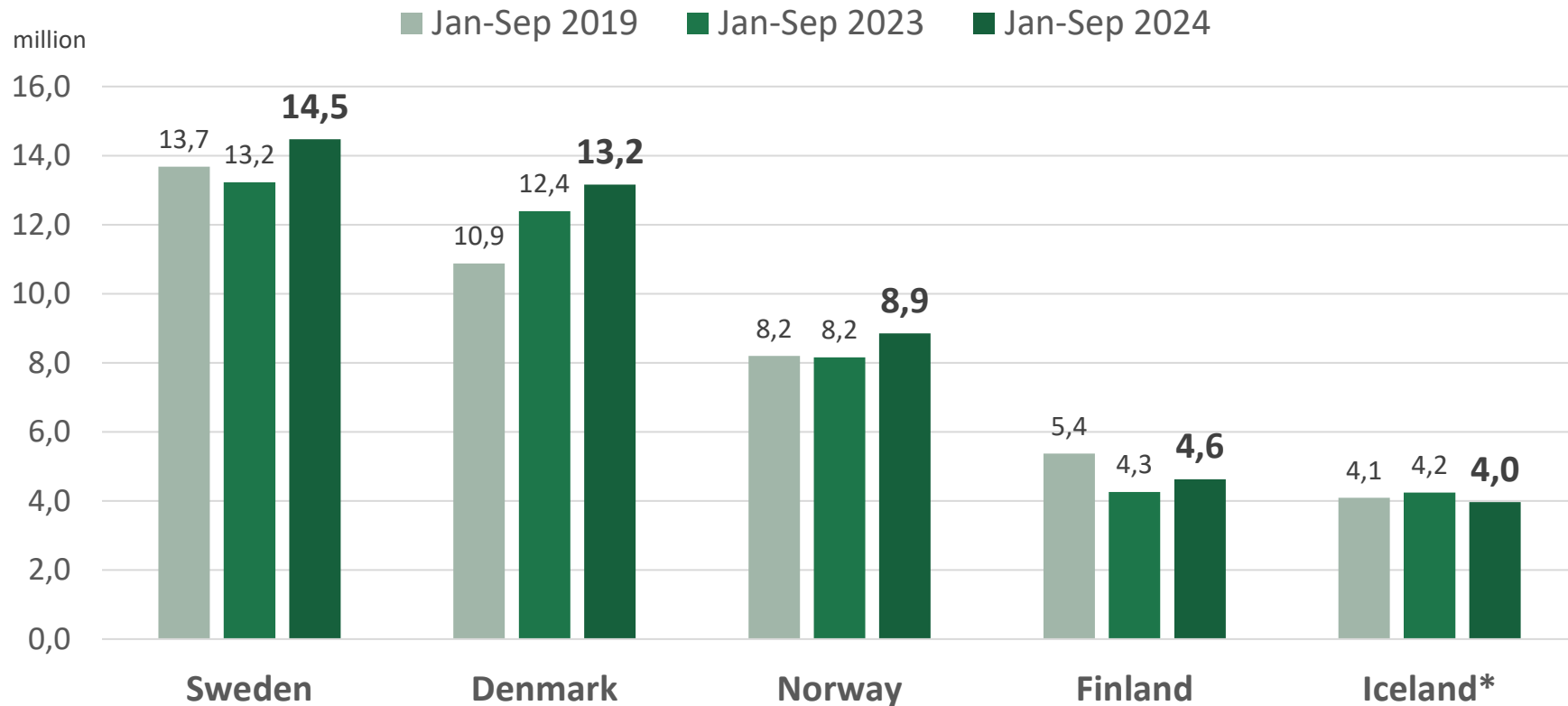
*) incl. only hotels & guesthouses



September 2024

- Number of foreign overnights was highest in **Denmark** (1.3M; YoY **+12%**, vs. 2019 **+37%**), **Sweden** (1.2M; **+11%**, **+12%**), and **Norway** (0.8M; **+17%**, **+25%**).
- **Iceland** and **Finland** had smaller volumes (0.5M and 0.4M respectively), and in both countries the number of foreign overnights remained below both Sep/2023 and Sep/2019 figures.

Cumulative foreign overnights in Nordics Jan-Sep



*) incl. only hotels & guesthouses

	Sweden	Denmark	Norway	Finland	Iceland*
2024 vs. 2023	+9%	+6%	+9%	+9%	-6%
2024 vs. 2019	+6%	+21%	+8%	-14%	-3%

Registered foreign overnights in Nordics Jan-Sep 2024

— Sweden — Denmark — Norway — Finland — Iceland*

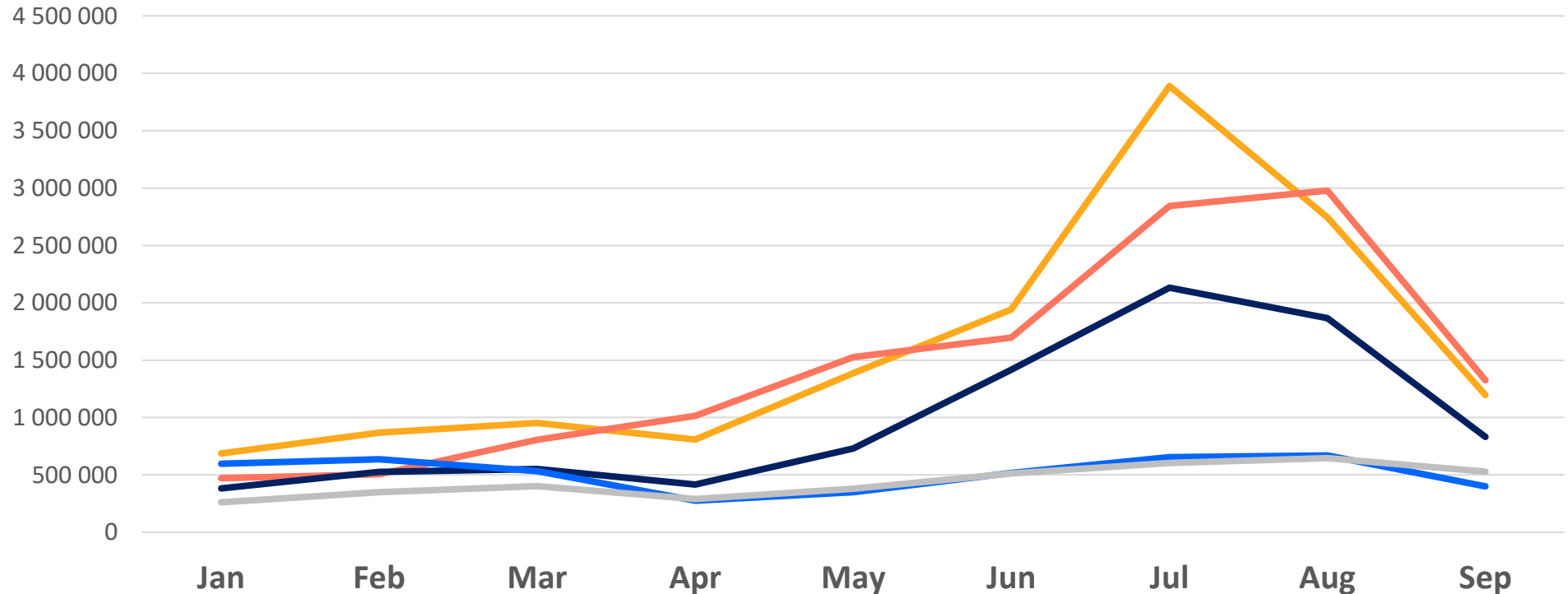
*) incl. only hotels & guesthouses

Denmark and Norway have totally recovered compared to 2019.

Sweden behind 2019 in Jan & Apr.

Finland above 2019 only in Feb.

Iceland reached 2019 levels during several months in 2023, but this year foreign overnights were above 2019 only in May.

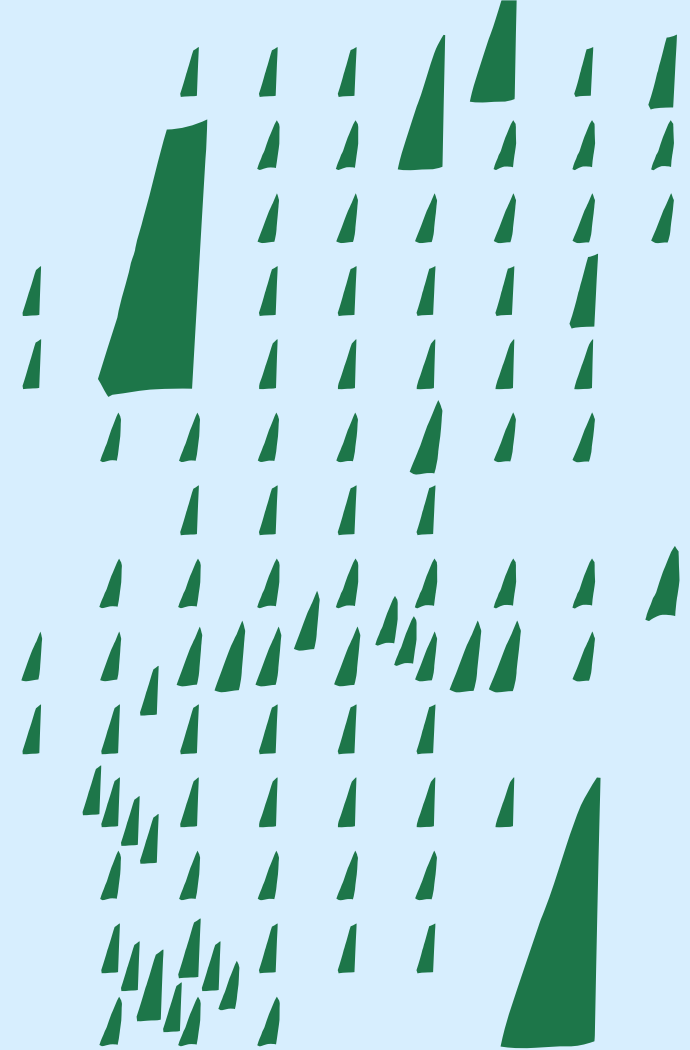


YoY change	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
SE	7 %	15 %	28 %	-5 %	19 %	10 %	3 %	12 %	11 %
DK	8 %	8 %	35 %	-10 %	16 %	3 %	1 %	6 %	12 %
NO	18 %	20 %	29 %	8 %	14 %	1 %	4 %	5 %	17 %
FI	12 %	14 %	10 %	4 %	-3 %	14 %	11 %	10 %	-2 %
IS	-8 %	1 %	0 %	-16 %	-12 %	-8 %	-7 %	-3 %	-7 %

Flight capacity and bookings for winter

Outlook for Dec 2024 – Feb 2025

- For the **winter season**, **capacity is improving to Finland and Norway** compared to previous winter. It has also nearly reached the pre-pandemic levels in Finland and Norway.
 - Capacity to Sweden remains on the same level than last winter, so it still stays 19% below pre-pandemic level.
- Demand for winter travel to the Nordics can clearly be seen in **flight bookings** which **grow strongly** compared to both previous winter and the winter before the covid years.
 - Bookings made by the 10th of November shows that **Finland** is leading the way with nearly 190,000 bookings.
 - Winter bookings to Finland, Norway, and Sweden are growing from several markets both compared to previous winter and to winter pre-pandemic.



Seat capacity & flight bookings worldwide for Dec/2024 – Feb/2025

Seat capacity for winter months is increasing to **Finland compared to previous winter**, and it is also getting closer to the pre-pandemic level compared to other seasons.

Bookings of foreign visitors for winter have **increased strongly** both for **Finland** and **Norway**, so it seems that new records will be made this winter again in both countries. Bookings to Sweden show positive development as well.

It looks also that bookings are made earlier than before, so **the pace of the growth seems to slow down** towards the winter months.

Seat capacity on direct flights

Dec/24 – Feb/25 compared to previous year (& pre-pandemic)



Database update 09-Nov



+15% (-2%)



0% (-19%)



+7% (-3%)

Flight bookings (direct & non-direct flights)

Dec/24 – Feb/25 compared to previous year (& pre-pandemic)



Database update 10-Nov



+18% (+33%)



+10% (+14%)



+17% (+45%)

Direct int'l flights to Finland Dec/2024 – Feb/2025

and change in seat capacity compared to last year (& pre-pandemic)

USA
 20 avg. weekly flights
 (Share; %YoY & %YoYPP)
(3%; +16% & +79%)

Asia
 93 avg. weekly flights
 (Share; %YoY & %YoYPP)
(12%; +8% & -30%)

Europe
 1,206 avg. weekly flights
 (Share; %YoY & %YoYPP)
(84%; +16% & +4%)

**Total seat capacity to Finland
 for Dec/2024 – Feb/2025**
2.6 M
+15% vs. 23/24 & -2% vs. 2019

From	To	Average weekly frequency
Bangkok (BKK)	HEL	14
Tokyo (HND)	HEL	10
Delhi (DEL)	HEL	7
Singapore (SIN)	HEL	7
Doha (DOH)	HEL	7
Hong Kong (HKG)	HEL	6-7
Phuket (HKT)	HEL	6-7
Seoul (ICN)	HEL	5-7
Dubai (DXB)	HEL	4-7
Shanghai (PVG)	HEL	5-6
Osaka (KIX)	HEL	2-3
Tokyo (NRT)	HEL	2-3
Hurghada (HRG)	HEL	2
Krabi (KBV)	HEL	1
Zhengzhou (CGO)	HEL	1

From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	5→7
Miami (MIA)	HEL	2-3
Los Angeles (LAX)	HEL	1-3

Follow up on flight bookings* to Finland for December 2024 – February 2025

compared to previous year & (pre-pandemic)

*Bookings for Dec-Feb → 1.9. → 29.9. → 27.10. → 10.11.

Total int'l Dec24-Feb25
YoY & (vs. pre-pandemic)

	→ 1.9.	→ 29.9.	→ 27.10.	→ 10.11.
Total int'l Dec24-Feb25	+33% (+61%)	+31% (+56%)	+24% (+42%)	+18% (+33%)
Germany	+22% (+115%)	+22% (+107%)	+15% (+86%)	+10% (+71%)
UK	+40% (+25%)	+38% (+15%)	+33% (+8%)	+29% (-1%)
France	+4% (+76%)	-2% (+59%)	-5% (+46%)	-8% (+42%)
USA	+72% (+171%)	+55% (+149%)	+43% (+117%)	+38% (+104%)
Switzerland	+44% (+64%)	+38% (+59%)	+30% (+49%)	+28% (+45%)
Netherlands	+3% (+73%)	+7% (+59%)	0% (+44%)	-4% (+39%)
Spain	+6% (+98%)	+4% (+110%)	+3% (+90%)	+1% (+78%)
Australia	+58% (+54%)	+64% (+57%)	+60% (+56%)	+60% (+57%)
Italy	+27% (+89%)	+23% (+67%)	+11% (+35%)	+5% (+23%)
Japan	+126% (+27%)	+116% (+43%)	+97% (+31%)	+76% (+10%)
China & Hong Kong				+24% (-59%)
Denmark				-5% (+15%)

189,400

No. of bookings*

31,400

19,100

14,700

13,900

12,000

9,200

9,000

8,100

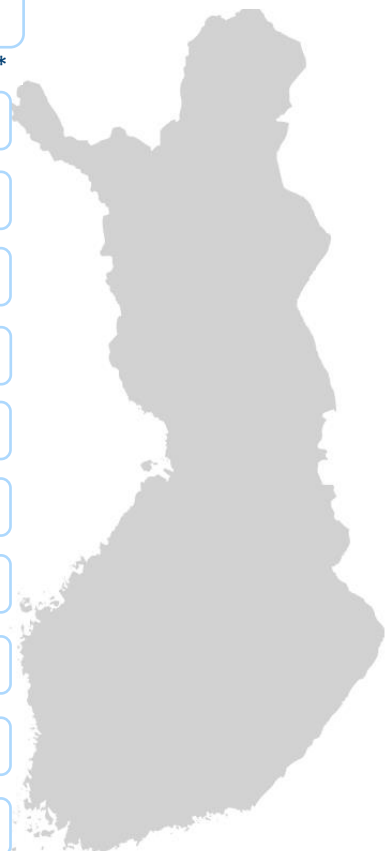
5,800

5,100

4,500

4,300

Dec - Feb



Please note! **Ryanair and EasyJet & charter flights** bookings are not included in the forward-looking booking data.

