



Visit Finland

VF monthly follow up

January – November 2023

Summary

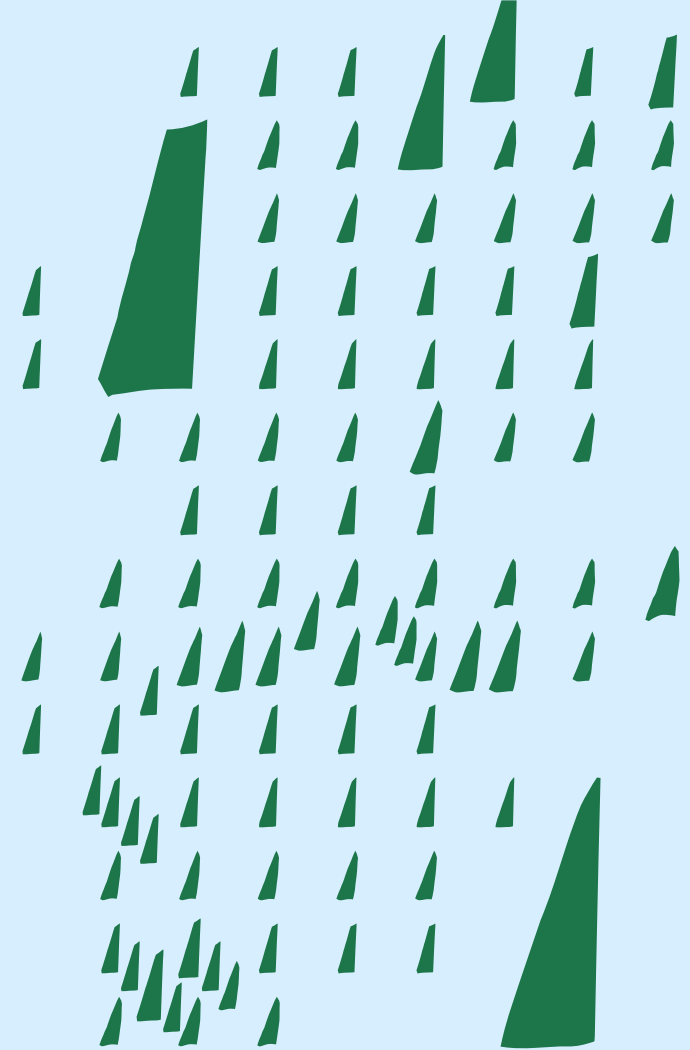
Travel to Finland and to the Nordics compared to pre-pandemic

- According to our **Border survey** (Matkailijamittari), the total number of trips to Finland by foreign visitors was **3.4 million** during **March-November 2023** and the total amount the visitors spent in Finland was **2,654M€**. The median length of stay was **4 nights**, and **72%** of the visitors were travelling for **leisure**.
- **Number of registered foreign overnights** during January-November 2023 were **21% below** the 2019 level. If we leave the Russian travellers out of scope, the overnights were 11% behind 2019 figures.
 - **Germany** and **Sweden** are the biggest source markets for registered overnights.
 - From the main source markets, **Germany, USA, France, the Netherlands, Italy, Belgium**, and **Austria** have all **exceeded** the number of overnights they had before the pandemic (Jan-Nov 2019).
- As the **Eurostat statistics on short-term rental** data tables have now been published in Visit Finland Statistics Service Rudolf, we are now able to analyse the **total number of paid foreign overnights**.
 - In general, approximately **every fifth paid foreign overnight** is spent in a **short-term rental** accommodation.
 - **Spanish** and **French** travellers seemed to be the most active users of short-term rental in 2022.
 - **Kymenlaakso** and **Kanta-Häme** had the **biggest share** of short-term rental overnights by foreign visitors in 2022. **Åland** had clearly the **smallest share**.
- The latest **recovery forecast by Oxford Economics** is aligned with the current registered overnight statistics (Jan-Nov). Travel from **Germany, USA, France, the Netherlands, Italy, Belgium**, and **Austria** to Finland has recovered during 2023 to the pre-pandemic level.
 - Travel from **Sweden, Spain, Switzerland**, and **India** to Finland is forecasted to recover during this year
- **International flight bookings** to Finland for **this winter** (Nov-Feb) are currently **8% below** the 2019 level.
- **Flight connectivity to Finland** is **19% below** the pre-pandemic level during winter season.

Border Survey

March-November 2023

- **Leisure travel** to Finland slowed down both in October and November
- **Median length of stay on leisure trips** was **4 nights** in November as it was also in October
- **Spending per leisure trip** was **744€** in November, so it came down from October (979€), when the spending on leisure trip was at the highest level so far
- **Share of package trips** was **7%** in November (highest in March, 15%)
- **Leisure trips** were booked **2.2 months** before the trip in average in November (1.8 months before in October)



Border Survey / March-November 2023

Foreign visitors in Finland

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



Trips / departure from Finland in March-November 2023

Foreign visitors in Finland

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

- **August** was clearly the busiest month with departing visitors
- **After September, trips slowed down** in October and November
- **Median length of stay on leisure trips** has been at the longest in July and August
- **Swedes** are leading by the number of **leisure trips to Finland**, followed by **Estonians** and **Germans**



Spending in Finland / March-November 2023

Foreign visitors in Finland

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

- **Total spend** has been on the highest level for visitors whose trip in Finland ended in August as it was also the busiest month with visitors
- In **July**, the total spend was very high for **business travellers** because there were several visitors who had **stayed in Finland for several months** and were returning to their home country in July
- **Spending per leisure trip** was at the highest level in October (979€)
- **Total spending on leisure trips** has been highest for **US** visitors, followed by **German** and **Swedish** visitors



Carbon Footprint / March-November 2023

Foreign visitors in Finland

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

 **Matkailijamittari**
Visit Finland

Year
All

Quarter
All

Month
All

Home

Map

Departure Countries
All

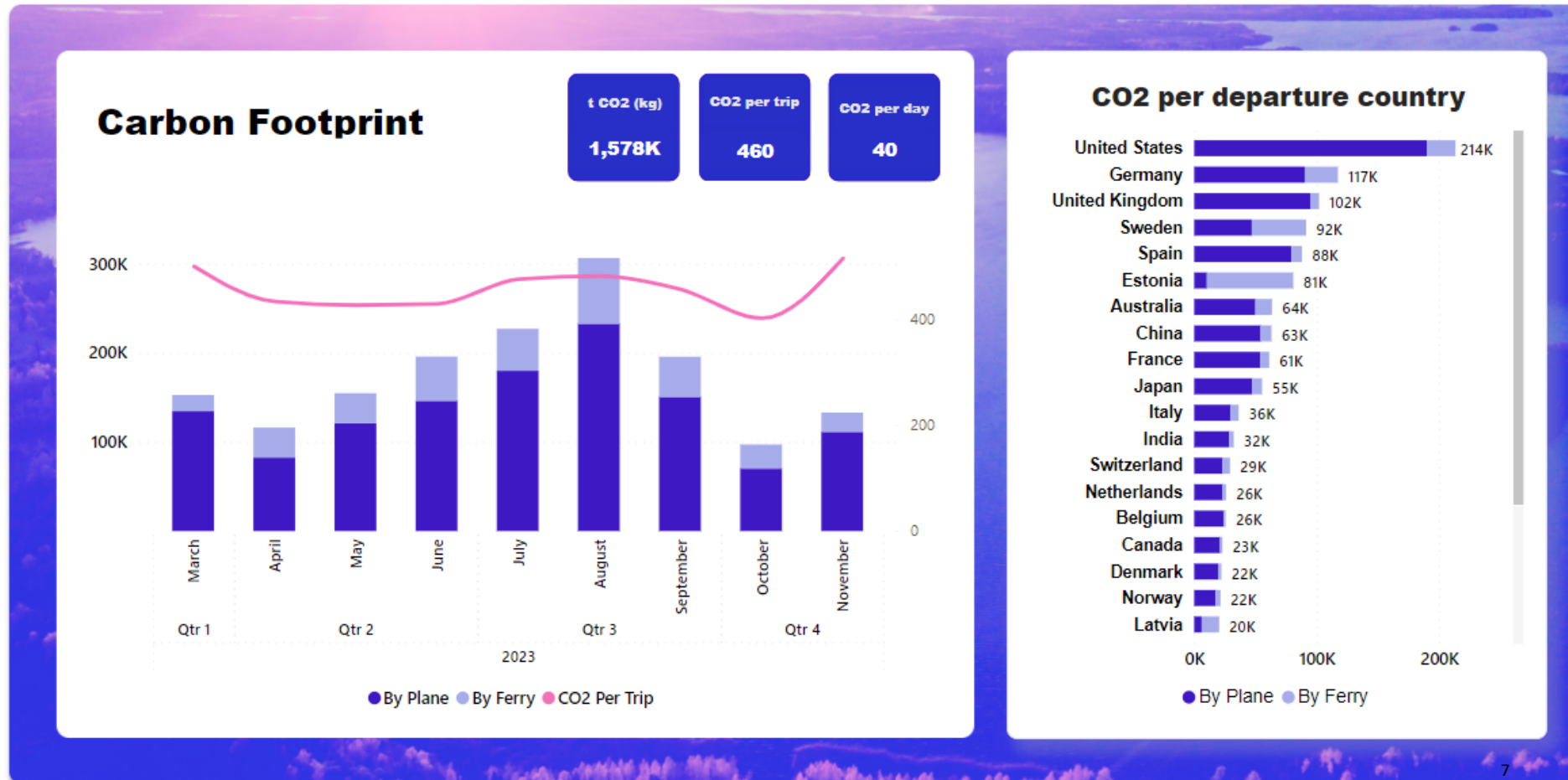
Travel Destinations
All

Travel Type
All

Start date
03/2023

End date
11/2023

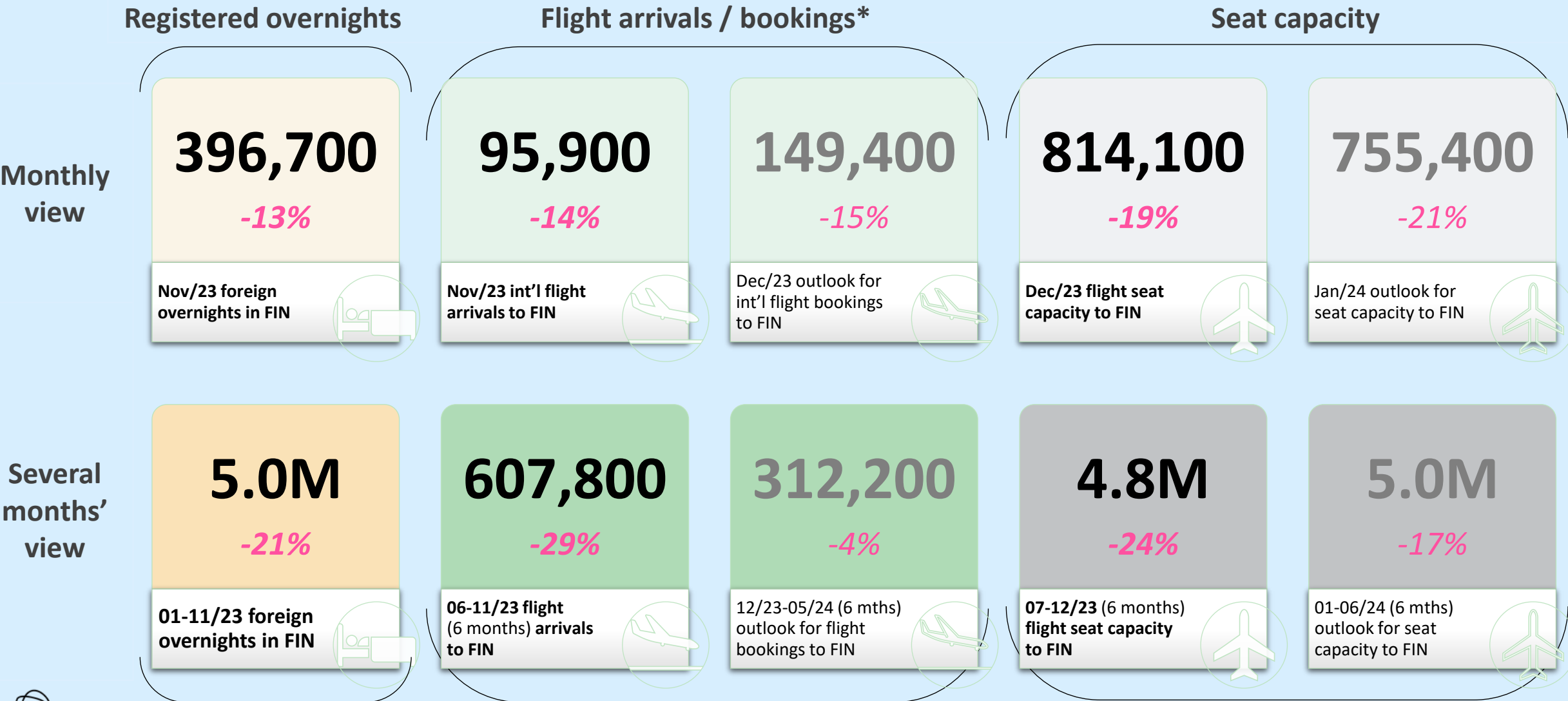
- **Carbon footprint** has been on the highest level in August so far, as is has also been the busiest travel month
- **Carbon footprint per trip** has been at the highest in **March** and **November** when the **share of air travel was at the highest (75%)**
- Total carbon footprint was clearly highest for **US** visitors, followed by **German** and **British** visitors



Foreign registered overnights & flight statistics

Compared to corresponding period in 2019

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



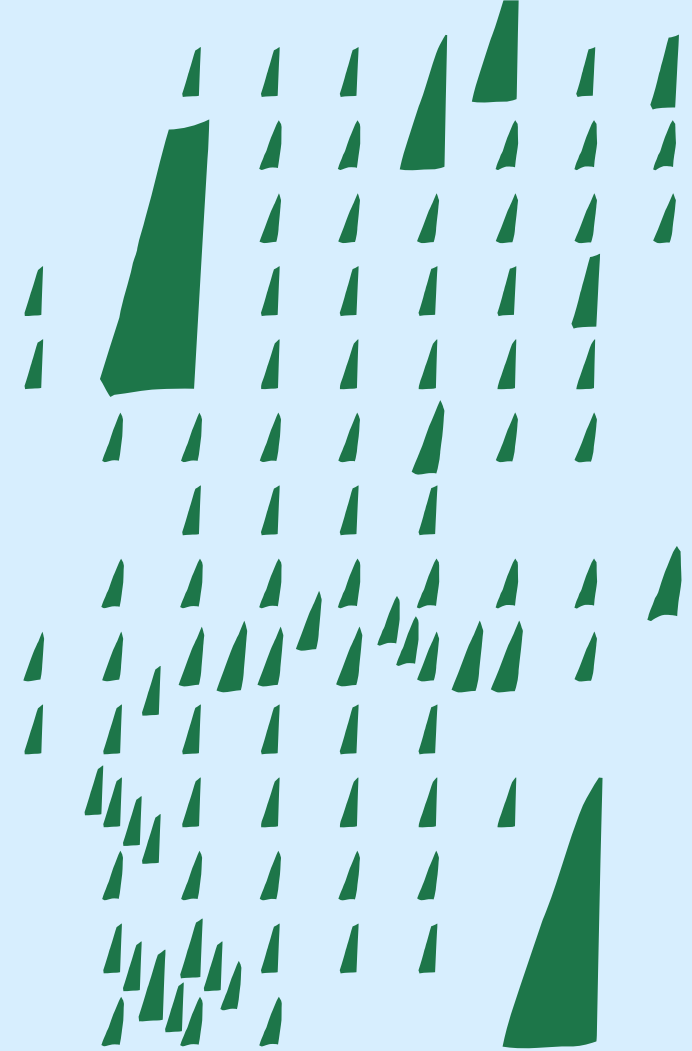
Registered overnights

- November

- Foreign overnights: **396,700** (+8% vs. Nov/22 & -13% vs. Nov/19)
- Foreign excl. Russia: **395,000** (+9% vs. Nov/22 & 0% vs. Nov/19)
- Top source markets: **UK, Germany, Sweden, USA**
- Top destinations:
Helsinki, Rovaniemi, Vantaa, Inari-Saariselkä, Kittilä-Levi, Tampere, Espoo

- January – November

- Foreign overnights: **5.0M** (+17% vs. Jan-Nov/22 & -21% vs. Jan-Nov/19)
- Foreign excl. Russia: **4.9M** (+20% vs. Jan-Nov/22 & -11% vs. Jan-Nov/19)
- Top source markets: **Germany, Sweden, USA, UK, France, the Netherlands**
- Top destinations:
Helsinki, Rovaniemi, Vantaa, Inari-Saariselkä, Kittilä-Levi, Tampere, Espoo, Turku, Kolari-Ylläs



Registered overnights Jan-Nov 2023

	Jan-Nov 2023	Change-% vs. Jan-Nov 2019
Total	21.0M	-1%
Domestic	16.1M	+7%
Foreign, total	5.0M	-21%
Foreign excl. Russia	4.9M	-11%
Russia	38,600	-95%
Scandinavia	755,200	-11%
EU-27 + UK	3.2M	-2%
America	465,300	+14%
Asia	543,900	-49%

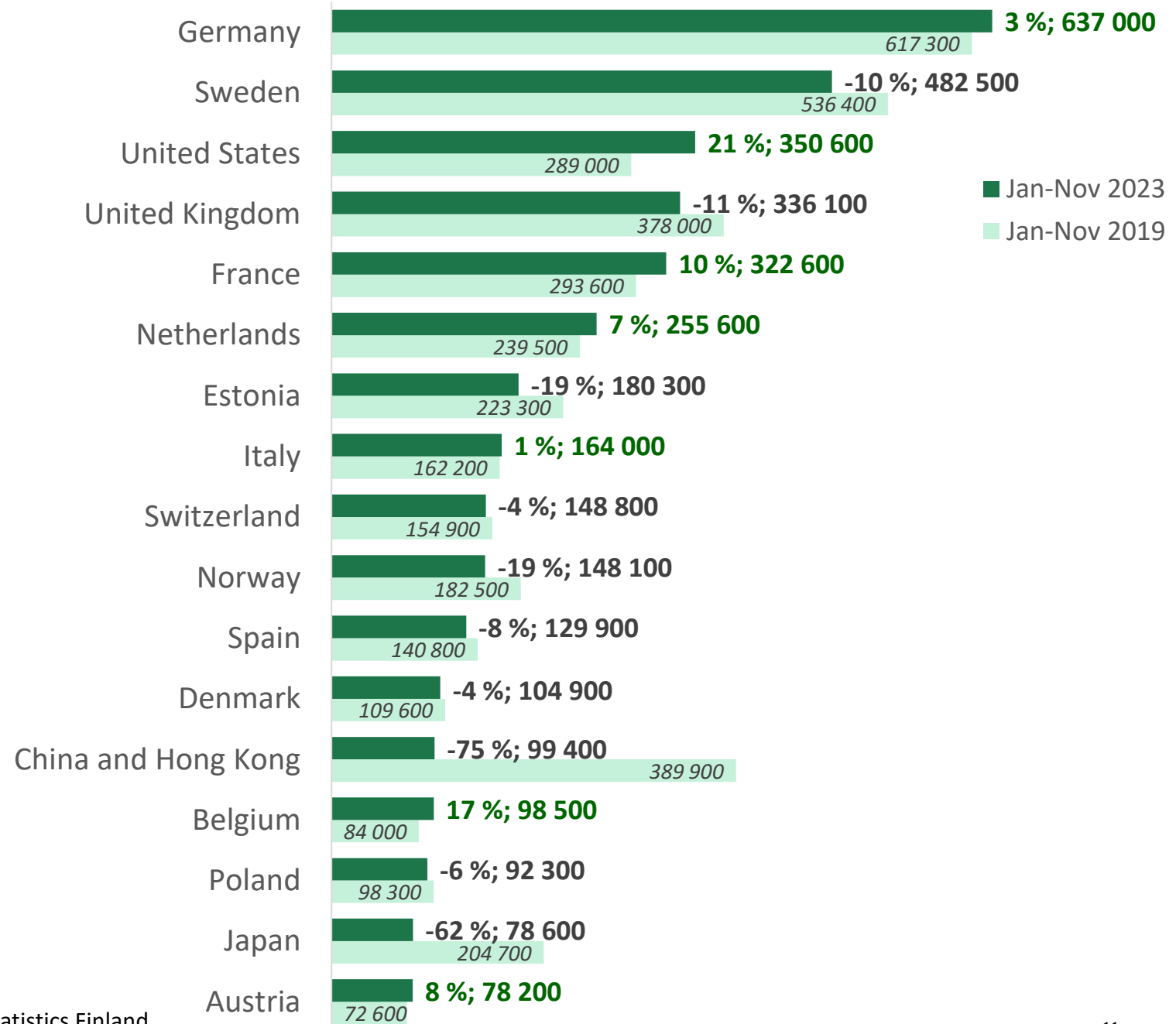


Top16 origin countries

Jan-Nov/2023 vs.
Jan-Nov/2019

During January – November 2023,
overnights developed positively compared
to 2019 from

- Germany & Austria
- Benelux countries
- USA
- France
- Italy





Year

2018

2019

2020

2021

2022

Latest

2024

Year month

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Overnights

21.0M

TOTAL overnights

YoY change %

4

YoY change %

Foreign

5.0M

Overnights

Foreign YoY change
17%

Domestic

16.1M

Overnights

Dom YoY change
1%

Revenue

1.4bn

TOTAL revenue

YoY change %

9

YoY change %

Foreign

374.2M

Revenue

Domestic

986.4M

Revenue

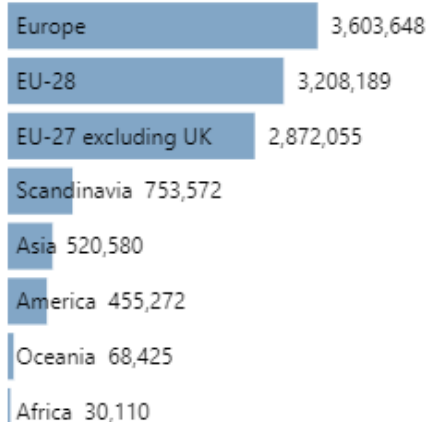
View Main regions, Regions by

Domestic

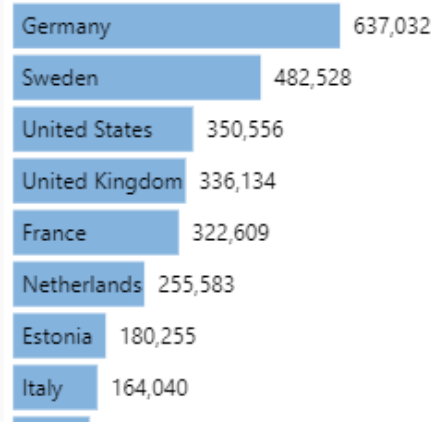
Foreign

REGIONAL OVERNIGHTS

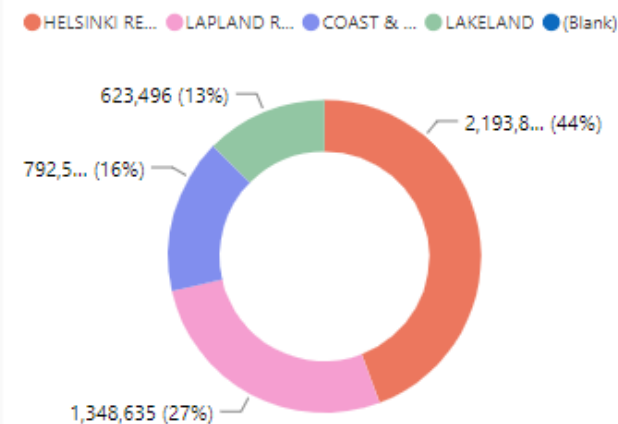
OVERNIGHTS FOREIGN REGION 2023,
202301-202311



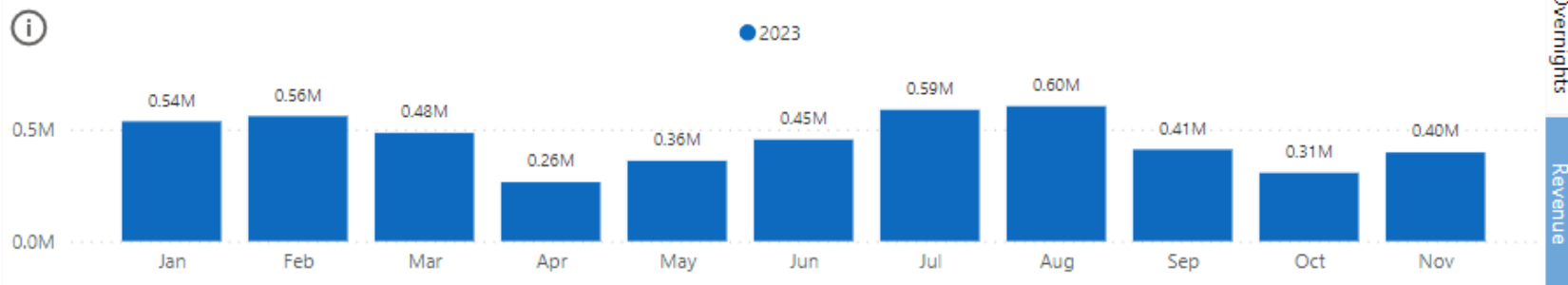
OVERNIGHTS BY COUNTRY YEAR 2023,
202301-202311



OVERNIGHTS IN MAIN REGIONS YEAR 2023, 202301-202311



FOREIGN OVERNIGHTS 2023



Sources: Statistics Service Rudolf, Statistics Finland





Registered overnights

RUDOLF STATISTICS - MONTHLY YoY COMPARISONS

MENU

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GO



Year

2018

2019

2020

2021

2022

Latest

2024

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

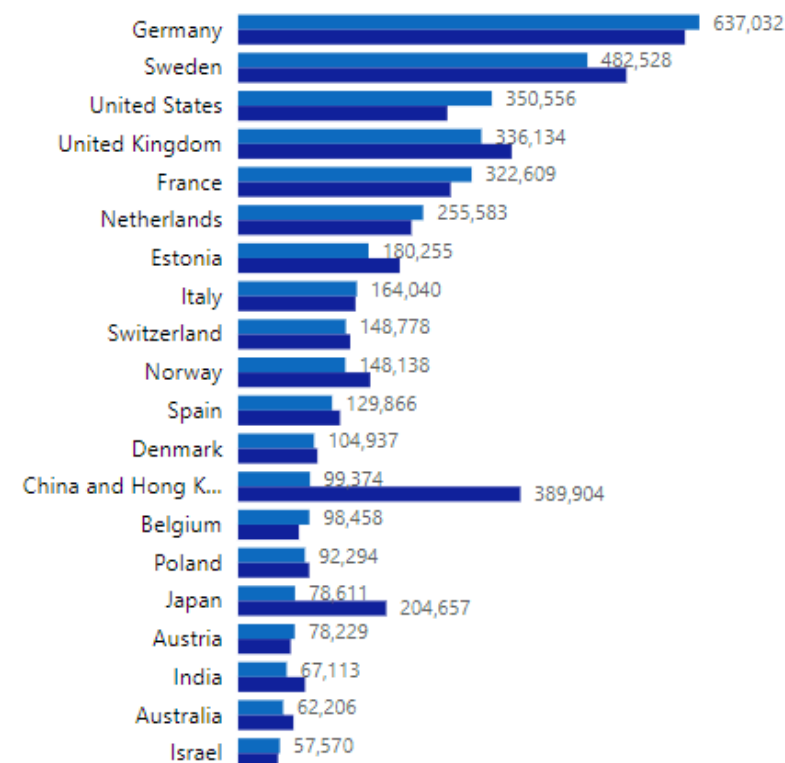
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2023 compared to 2019 months 1-11

Main area	2023 MAX year	2019 MIN year	Change %
HELSINKI REGION	2,193,821	2,820,074	-22.2
LAPLAND REGION	1,348,635	1,334,407	1.1
COAST & ARCHIPELAGO	792,549	1,030,569	-23.1
Åland	201,717	222,439	-9.3
Southwest Finland	187,306	255,552	-26.7
North Ostrobothnia (excl. Kuusamo)	130,636	144,095	-9.3
Uusimaa 2 (excl. Helsinki Metropolitan Area)	80,054	155,014	-48.4
Ostrobothnia	72,243	79,977	-9.7
Satakunta	47,686	55,488	-14.1
South Ostrobothnia	31,574	43,956	-28.2
Kymenlaakso	25,155	50,912	-50.6
Central Ostrobothnia	16,178	23,136	-30.1
LAKELAND	623,496	1,081,915	-42.4
Pirkanmaa	202,342	210,738	-4.0
Central Finland	98,063	121,083	-19.0
Päijät-Häme	69,838	101,686	-31.3
North Savo	60,061	101,258	-40.7
South Savo	58,507	141,186	-58.6
North Karelia	39,532	68,756	-42.5
Kainuu	36,835	87,528	-57.9
South Karelia	35,772	219,538	-83.7
Kanta-Häme	22,546	30,142	-25.2
Total	4,958,501	6,266,965	-20.9

OVERNIGHTS 2023 compared to 2019 months 1-11

● MAX year ● MIN year



Sources: Statistics Service Rudolf, Statistics Finland

Recovered destinations with over 10,000 overnights (over 100,000 in bold):

- Rovaniemi
- Kittilä-Levi
- Kolari-Ylläs
- Muonio
- Enontekiö
- Inari-Saariselkä
- Pelkosenniemi
- Torniolaakso

- Pudasjärvi-Syöte
- Kalajoki
- Pori

- Tampere



Visit Finland

Rudolf statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

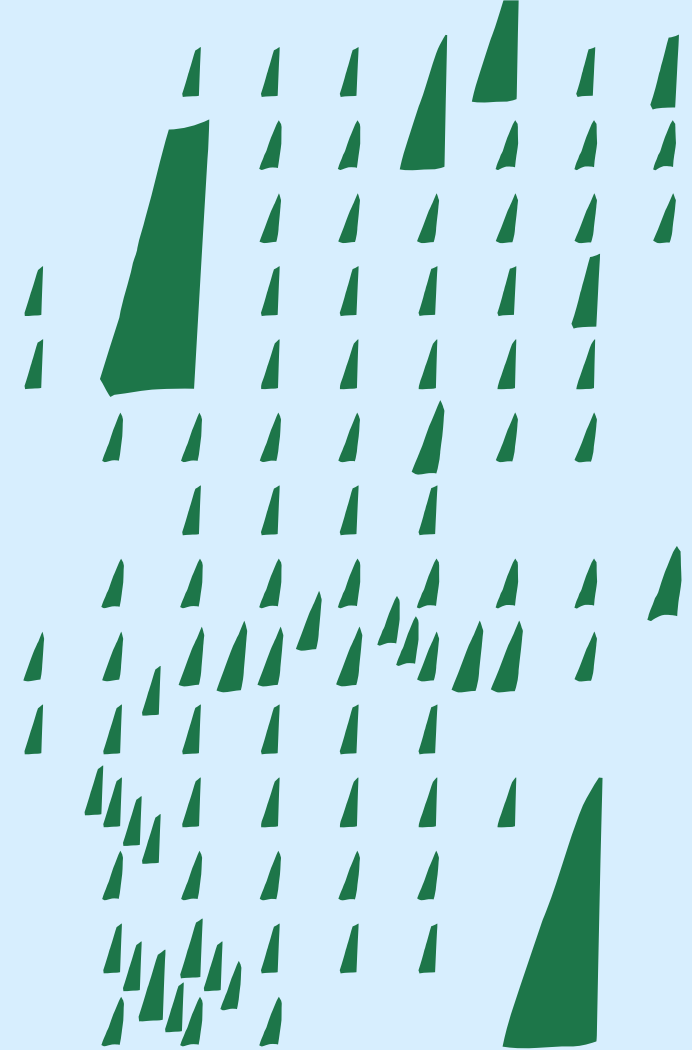
Overnights in short-term rentals

We have now an easy access to the Eurostat statistics on overnights in short-term rentals (collaborative economy platforms, e.g. Airbnb), as the new data tables have been published in [Visit Finland Statistics Service Rudolf](#) by Statistics Finland.

Publishing schedule is slower than the one for registered overnight statistics, so that's why we also have now the statistics available only until June 2023.

The monthly statistics shows us the aggregate level (total – domestic – foreign) of overnights, while source country and destination specific statistics are published only on a yearly basis.

- In general, we can see that approximately **every fifth** paid foreign overnight is spent in a **short-term rental accommodation**.
- **American** and **European** travellers tend to use short-term rental more often than travellers from Asia.
- Among the biggest source markets during 2022, **Spanish** and **French** travellers seem to be **the most active users** of short-term rental, followed by **Estonian**, **German**, and **US** visitors.
- In **Kymenlaakso** and **South Karelia** the share of short-term rentals by foreign visitors was **around 40%** in 2022. Other regions where the share is **above one third** are **Southwest Finland**, **Kanta-Häme**, **South and North Savo**, and **Central Finland**.
- Short-term rentals have **clearly the smallest share** of foreign overnights in **Åland**.



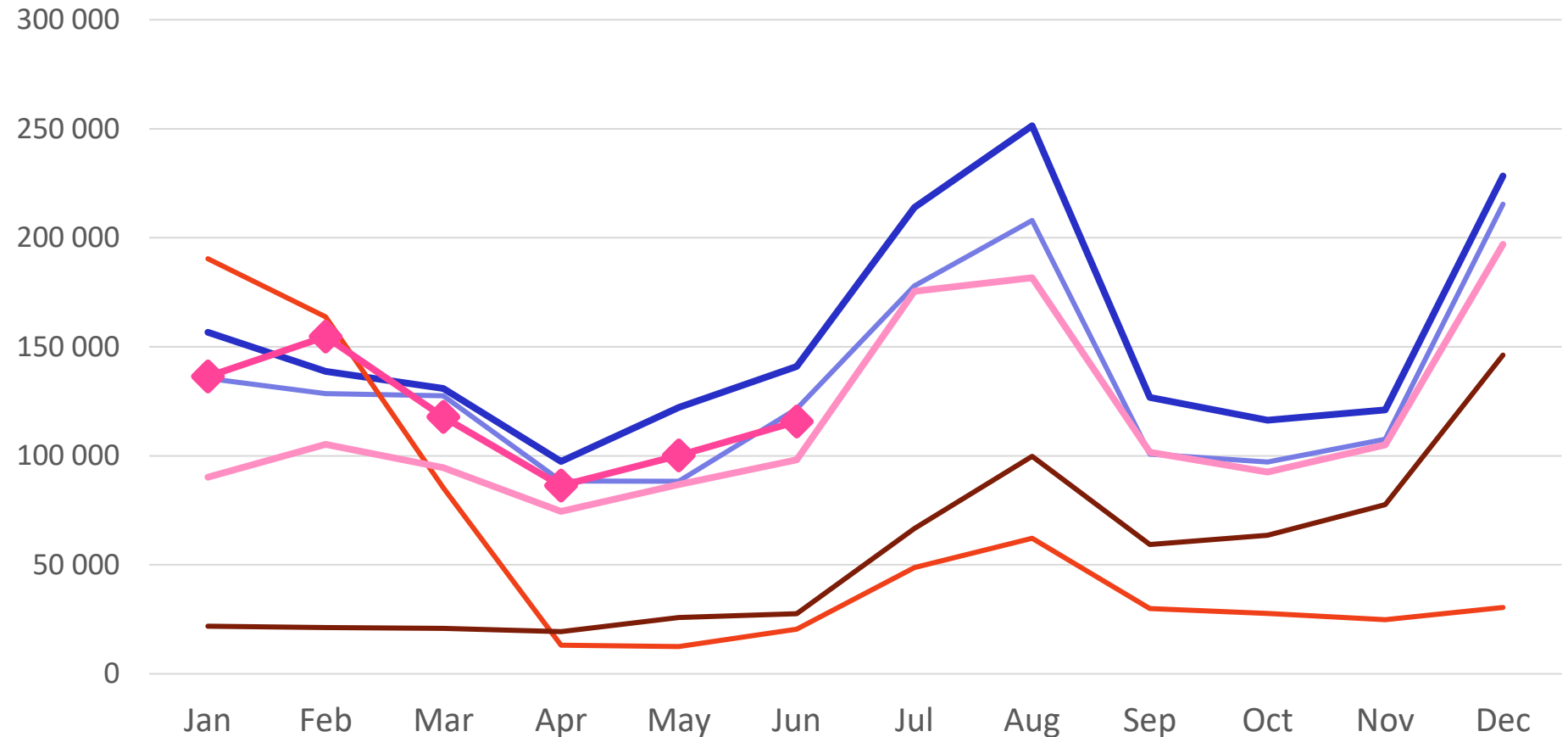
Foreign overnights in short-term rentals (Airbnb etc. platforms)

Short-term rentals: Foreign overnights in Finland 2018-2023

— 2018 — 2019 — 2020 — 2021 — 2022 — 2023

Number of **foreign overnights in short-term rentals** exceeded the 2019 level in February 2023, but otherwise it has remained on a lower level than in 2019.

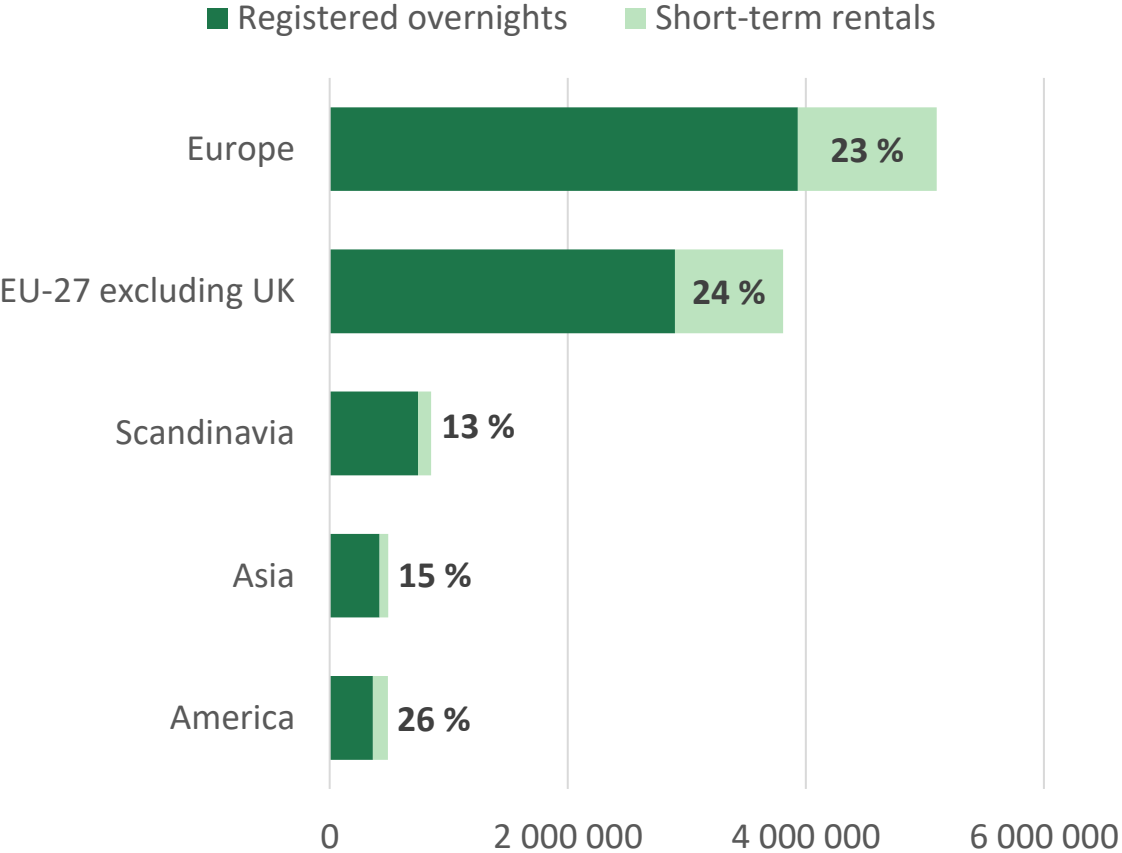
Data is available until June 2023 at the moment.



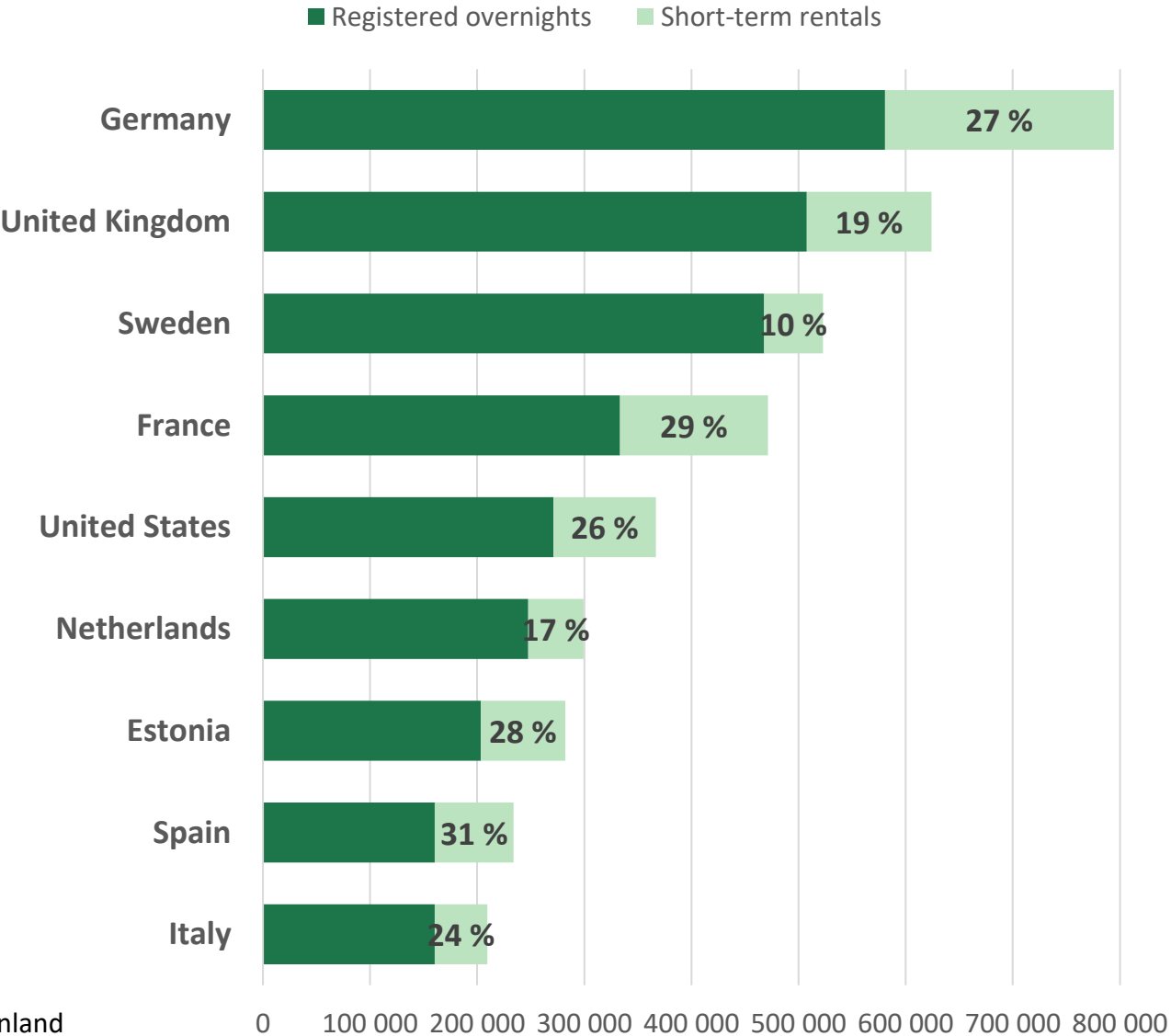
Registered and short-term rentals overnights in Finland - Year 2022

Foreign overnights 2022: **6.4M in total**

- Registered **5.0M** (78%)
- Short-term rentals **1.4M** (22%)



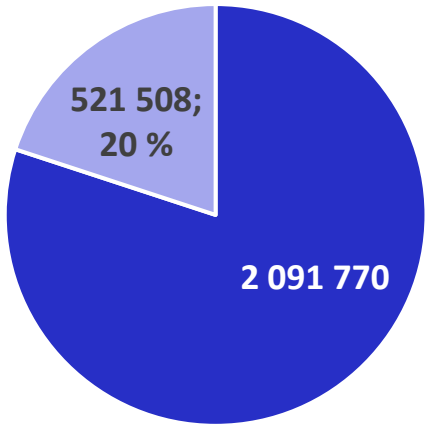
Top source markets for overnights in Finland - Year 2022



Registered and short-term rentals overnights in regions Year 2022

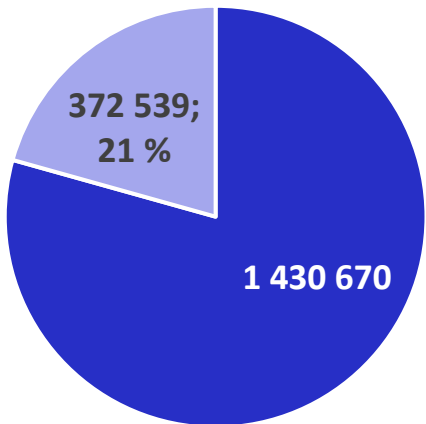
Uusimaa, foreign overnights in 2022

■ Registered overnights ■ Short-term rentals overnights

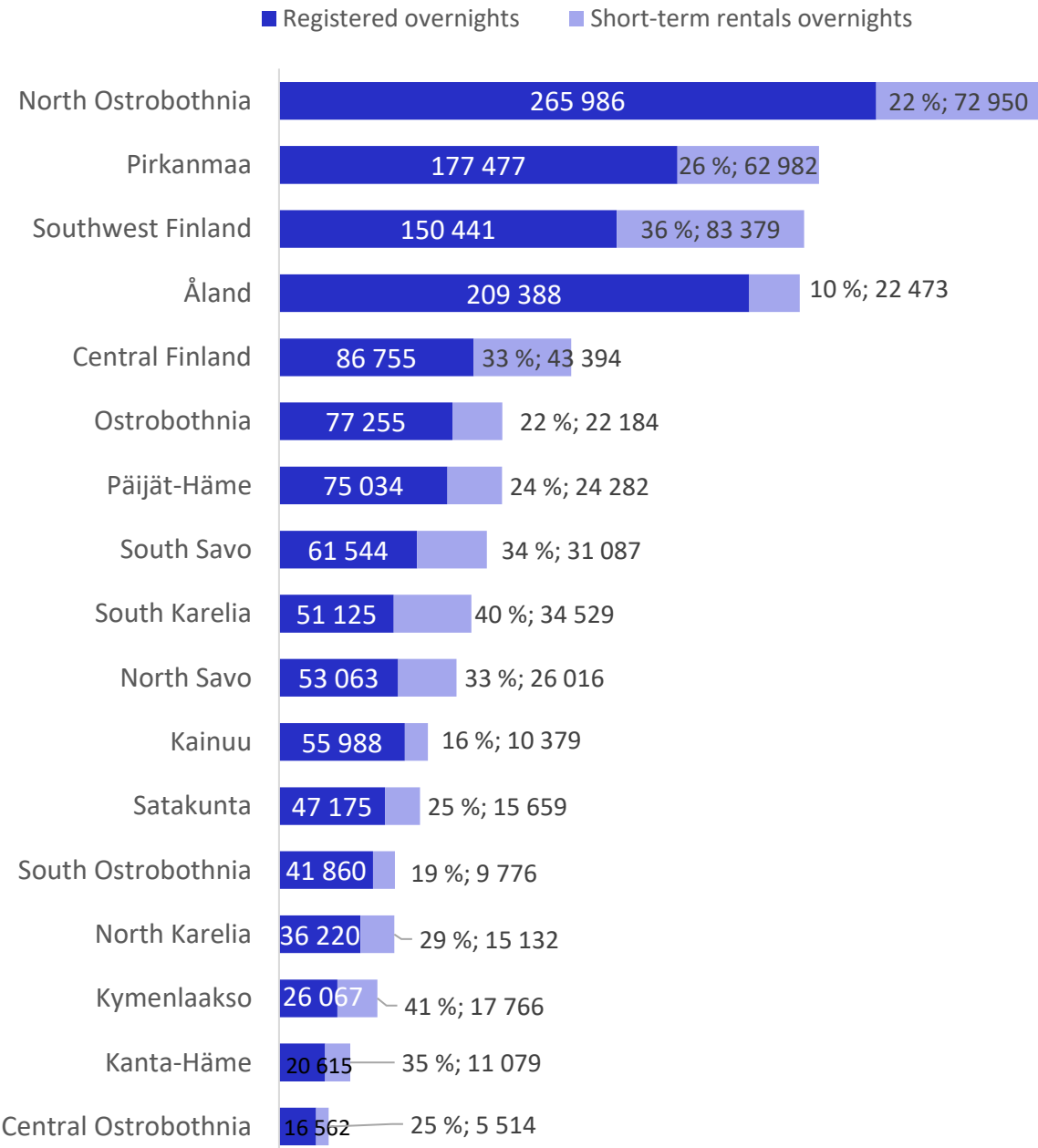


Lapland, foreign overnights in 2022

■ Registered overnights ■ Short-term rentals overnights



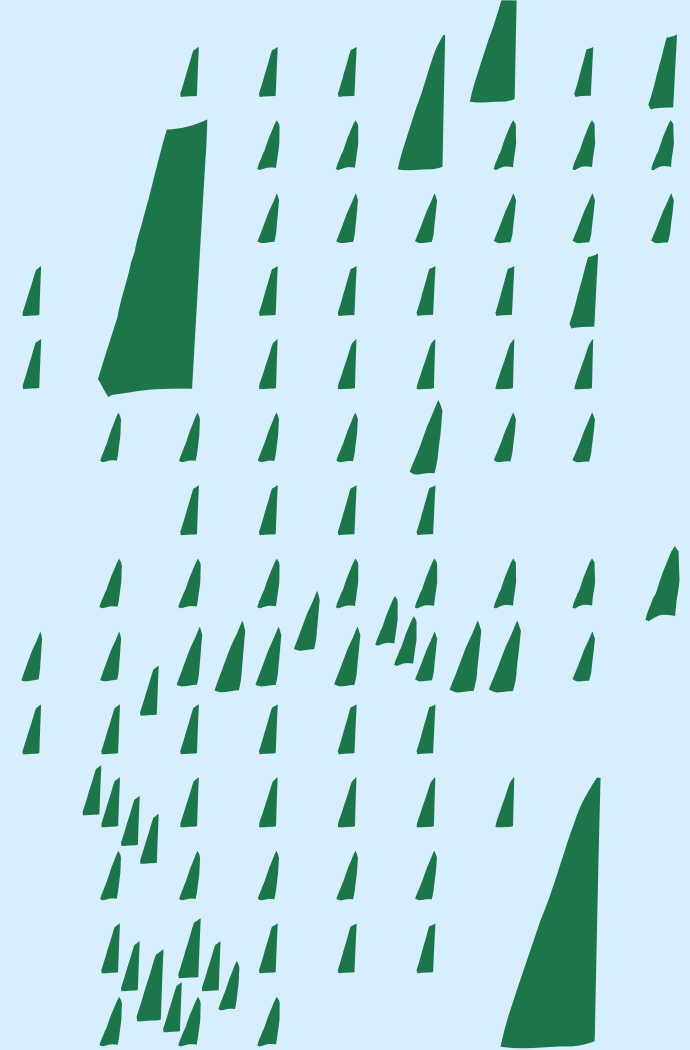
Foreign overnights in other Finnish regions - Year 2022



Oxford Economics forecast on travel recovery

Databank update in December 2023

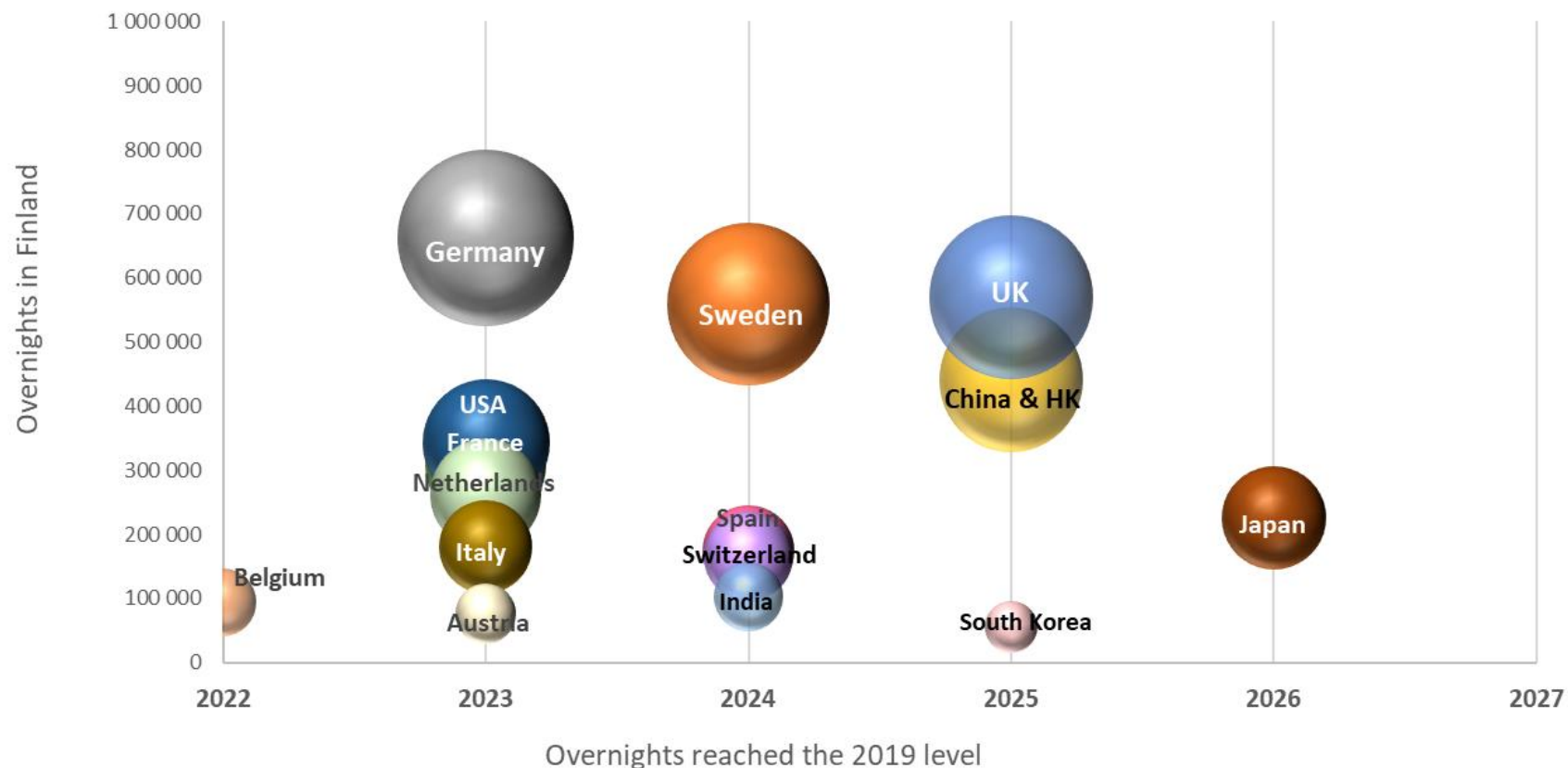
- According to the forecast and also to the current overnight statistics (Jan-Nov) travel from **Germany, USA, France, the Netherlands, Italy, Belgium, and Austria** to Finland has **recovered to the pre-pandemic level**.
- **Spending in Finland** seems to be recovering **at a faster pace** than the overnights on each of our target markets.



Overnights – Recovery to 2019 levels

Databank update December/2023

Recovery timeline - Overnights in Finland reached the level of 2019



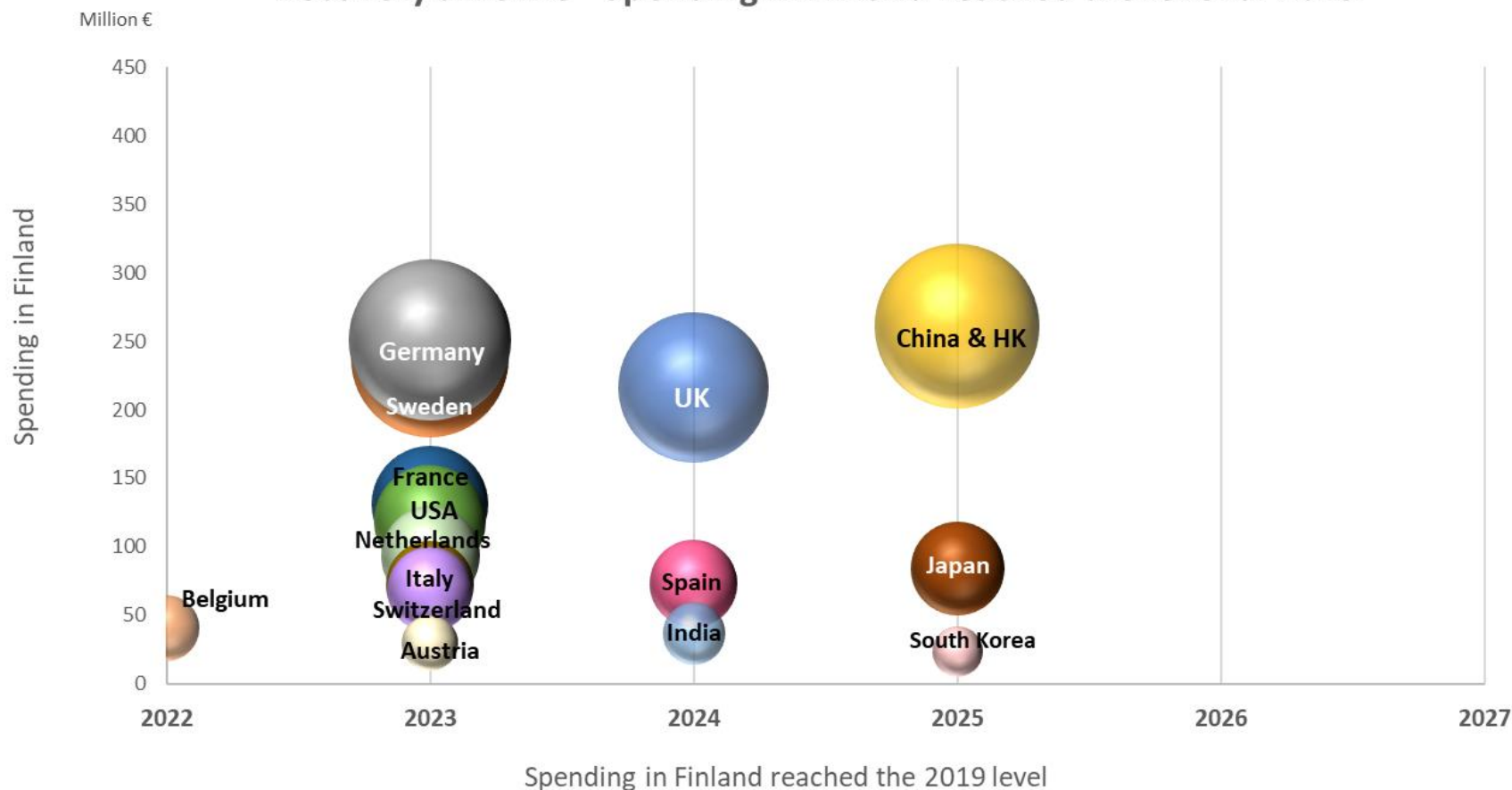
Source: Oxford Economics, databank update Dec 15, 2023

	No. of overnights in 2023	comp.to 2019
Germany	682 100	3 %
Sweden	503 900	-7 %
UK	474 900	-15 %
France	374 000	10 %
USA	367 200	19 %
Netherlands	281 700	10 %
Italy	180 500	-2 %
Switzerland	158 500	-7 %
Spain	155 600	-13 %
Belgium	111 400	26 %
China & HK	108 000	-80 %
Austria	83 300	11 %
Japan	81 600	-66 %
India	74 200	-27 %
South Korea	36 800	-33 %

Spending – Recovery to 2019 levels

Databank update December/2023

Recovery timeline - Spending in Finland reached the level of 2019

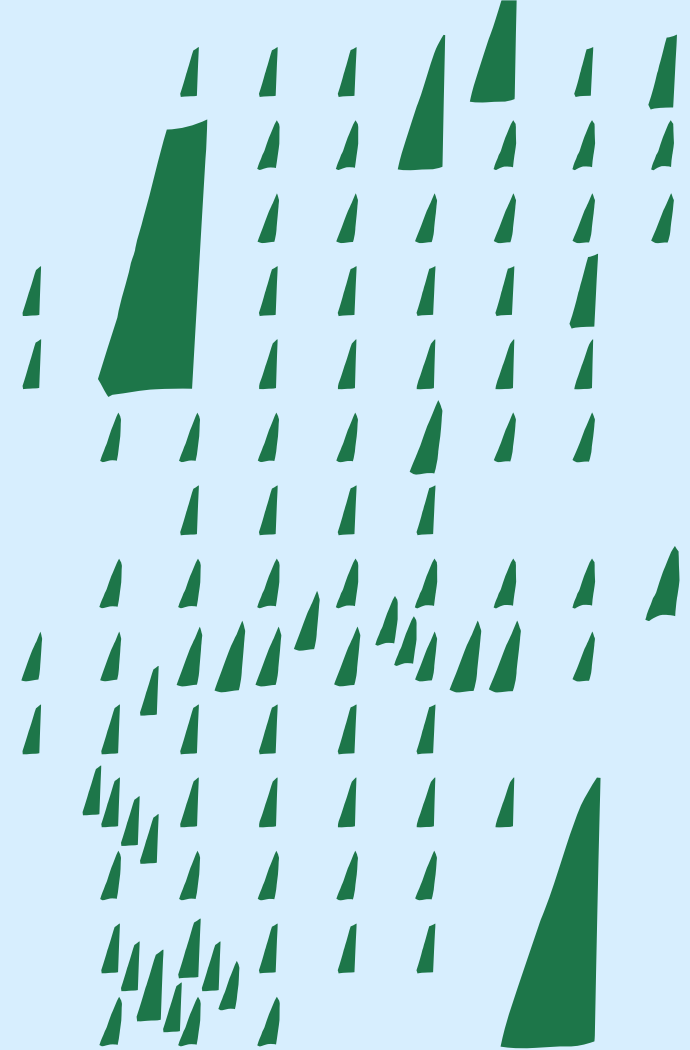


Source: Oxford Economics, databank update Dec 15, 2023

	Spending (Million EUR) in 2023	comp.to 2019
Germany	269	17 %
Sweden	229	8 %
UK	182	-6 %
USA	152	38 %
France	147	24 %
Netherlands	103	25 %
Italy	78	14 %
China & HK	77	-71 %
Switzerland	70	8 %
Spain	67	-4 %
Belgium	51	44 %
Austria	34	30 %
Japan	30	-64 %
India	28	-16 %
South Korea	16	-27 %

Flight arrivals & bookings

- Airline bookings for the **winter months** of Nov/23-Feb/24 show a **significant increase from several source markets compared to 2019**. Beside the **EU countries**, bookings show positive development from **USA, Australia, India, Canada, and the UAE**.
- On the other hand, total international air travel to Finland for Jun-Sep 2023 stayed nearly one third below the pre-pandemic level with only USA, the Netherlands, and Spain performing slightly better than in 2019.



Int'l arrivals/bookings for Nov/2023 – Feb/2024

367,400

(-8%)

Bookings, foreign
for Nov/2023 – Feb/2024
(change vs. pre-pandemic)

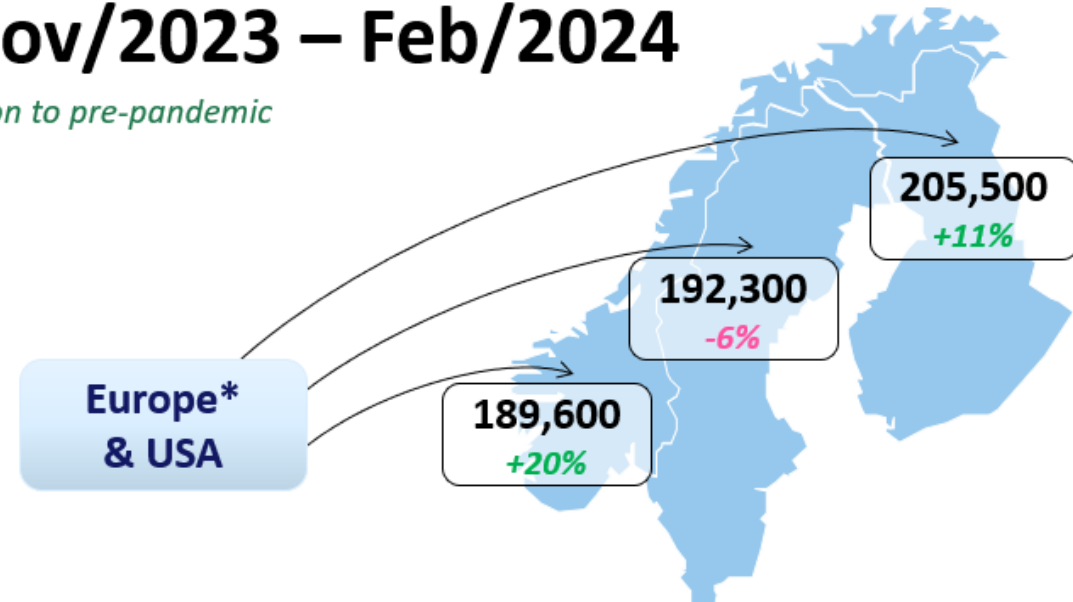
205,500

(+11%)

Bookings,
selected markets* & USA
for Nov/2023 – Feb/2024
(change vs. pre-pandemic)

Flight bookings from Europe* & USA for Nov/2023 – Feb/2024

Comparison to pre-pandemic



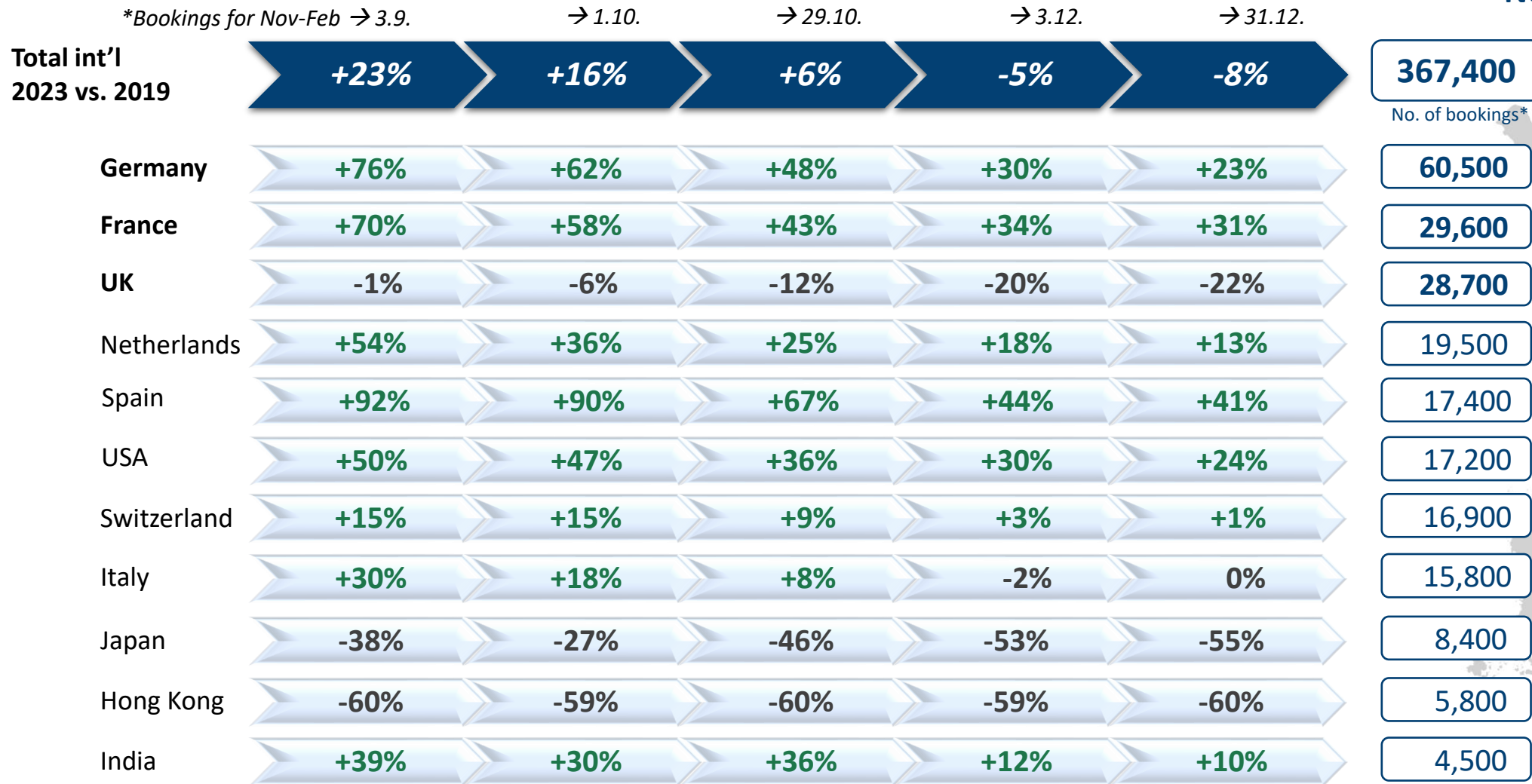
*) Including:

- Germany
- UK
- France
- Netherlands
- Switzerland
- Spain
- Italy

Follow up on flight bookings* for Nov/2023 – Feb/2024

compared to pre-pandemic

November-February

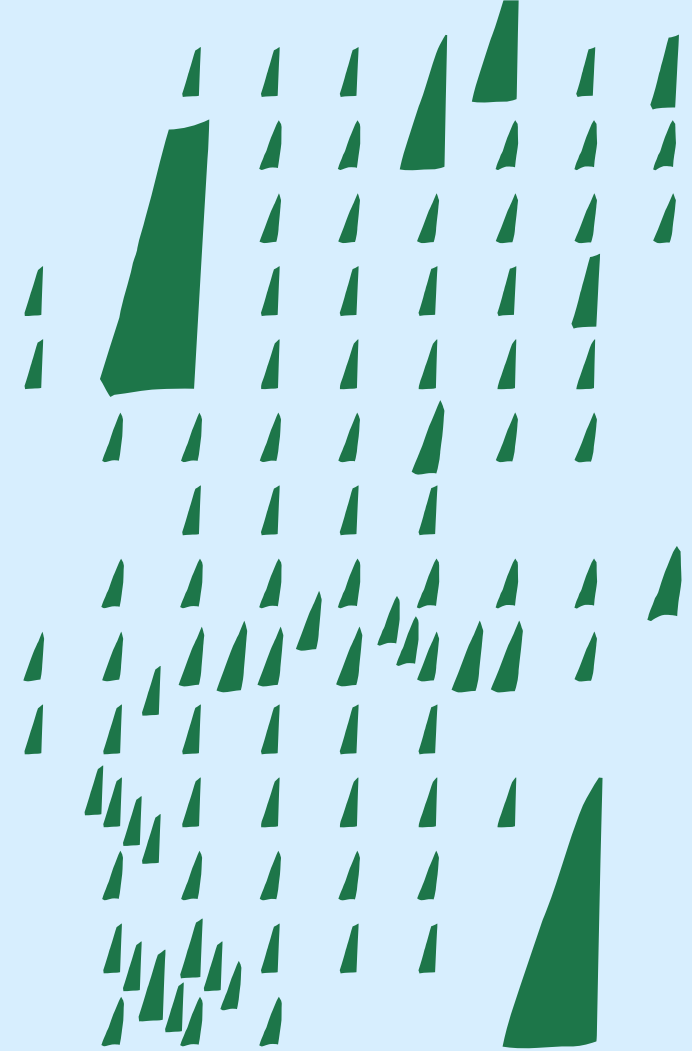


Please note! **Ryanair** and **EasyJet** bookings as well as **charter flights** are not included in the booking data.

This has a big impact especially on bookings from the **UK** and **Italy**.

Seat capacity on int'l flights

- **Seat capacity** for the **winter months** of Nov/23-Feb/24 is **19% below the pre-pandemic level**. However, there are clearly **more direct flights from Europe to Lapland**, so the seat capacity to Lapland has more than doubled.
- Seat capacity for Jun-Sep 2023 was 27% below the pre-pandemic level.



Direct int'l flights to Finland November 2023 – February 2024

and change in seat capacity compared to pre-pandemic

