



Visit Finland

VF monthly follow-up

March & Q1-2025



Summary

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

Border survey latest 12 months (Apr 2024 – Mar 2025) & Q1-2025

- Foreign visitors made nearly **4.9 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 **75%** of the visitors were travelling for **leisure purposes**.
- During **the first quarter of 2025**, there were **slightly less visitors** to Finland than during the previous year, but **total spend was higher**, as the visitors **spent more per trip** and **per day**.
 - When looking only at the **vacation/recreation travellers** the number of **trips to Finland increased** by **17%** and they **spent 15% more** than year before. The **average advance booking time** for holiday trips during the first quarter of year 2025 was **longer** than the year before, and the **share of package trips** was **smaller**.
 - **France** and **Germany** were the biggest source markets by the number of **holiday trips and total spending**. **Holiday makers** from **USA, France, Switzerland**, and **Spain** were the **biggest spenders per trip**. Top spenders per day were **Spanish, Italian** and **French** holiday makers.

Registered overnights in Finland in Q1-2025 & March

- Number of **registered foreign overnights** was nearly **2.0 million** with an **increase of 10%** compared to previous year. *Number of foreign overnights exceeded also the level of 2019 by 6%.*
 - The biggest source markets were **Germany, France, UK**, and **the Netherlands**.
- During **March 2025**, registered foreign overnights **increased by 11%** compared to March 2024 *and 6% compared to March 2019.*
 - **Germany, France**, and **the Netherlands** were the biggest source markets.
 - **Helsinki, Rovaniemi**, Inari-Saariselkä, Kittilä-Levi, Vantaa, and Kolari-Ylläs were the main destinations.

Summary

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

Registered overnights in the Nordics in Q1-2025

As Iceland is currently undergoing revisions in their statistics, their overnight figures are not available at the moment.

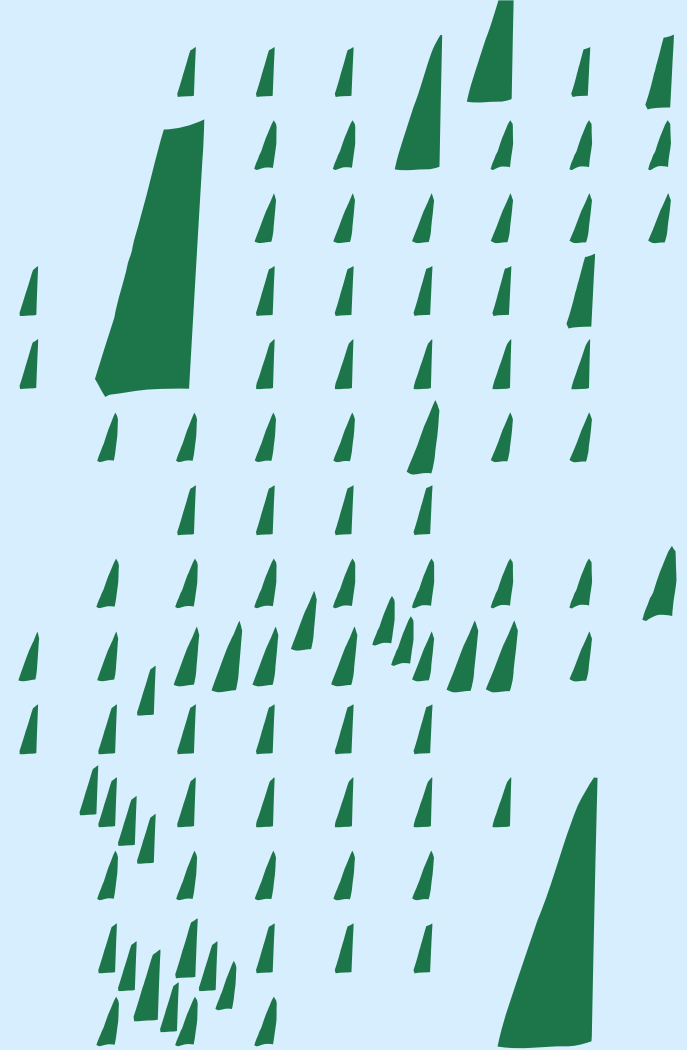
- **During the first quarter of 2025**, there were **7.7 million** registered foreign overnights **in the Nordics excluding Iceland** (where currently the accommodation statistics are undergoing revisions). Overnights **increased by 6%** compared to Q1-2024.
 - **Finland's market share** among the four countries was **24%**. Sweden was the market leader in the first quarter with a share of 31%, Denmark came second with 25% market share, and Norway came last with 20% market share.

Flight bookings and capacity for the summer months Jun-Aug 2025

- **Airline bookings to Finland** for the summer months of June-August are **slightly increasing** compared to last year. *When comparing to summer 2019, the total int'l bookings are 17% below that level. However, among the main source markets **USA, the Netherlands, Spain, and Poland** show positive development compared to 2019.*
- Total int'l seat capacity for the summer is **4% above 2024 level**, *but still -14% compared to the pre-pandemic level.*
 - Seat capacity from **Europe** and **Asia** is improving compared to previous summer *but remains below the level of summer 2019.*
 - Seat capacity from **USA** is clearly above both summer 2024 and summer 2019 levels.

Border Survey

Latest 12 months (Apr/2024 – Mar/2025)

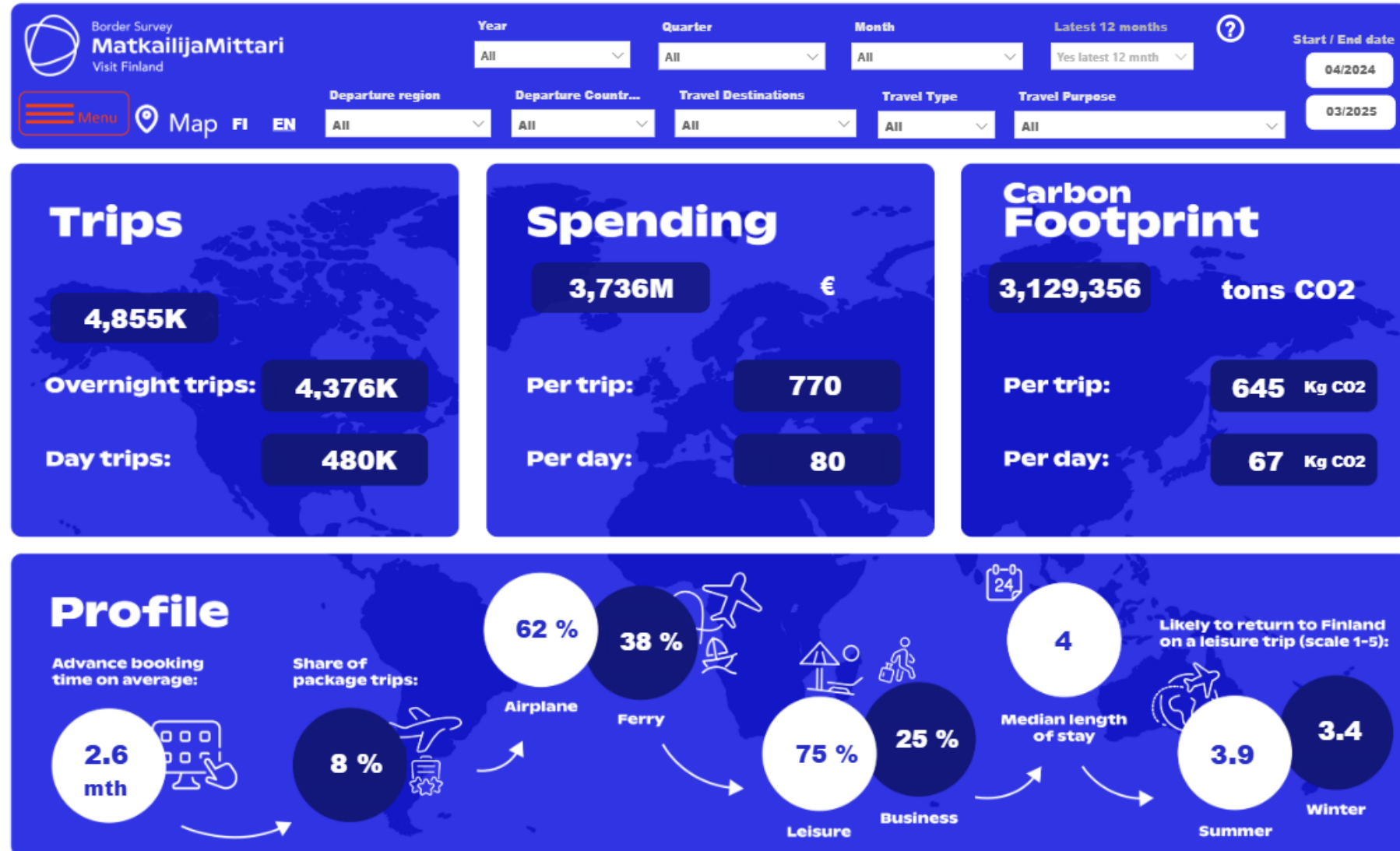


Border Survey / latest 12 months (Apr/2024 – Mar/2025)

Foreign visitors in Finland

Apr/2024 – Mar/2025

- Nearly **4.9 million** visitors
 - 90% overnight trips
- Spending **3.7 billion€**
 - 770 € / trip
 - 80 € / day
- **75%** travelling for leisure
- Median length of stay **4 nights**

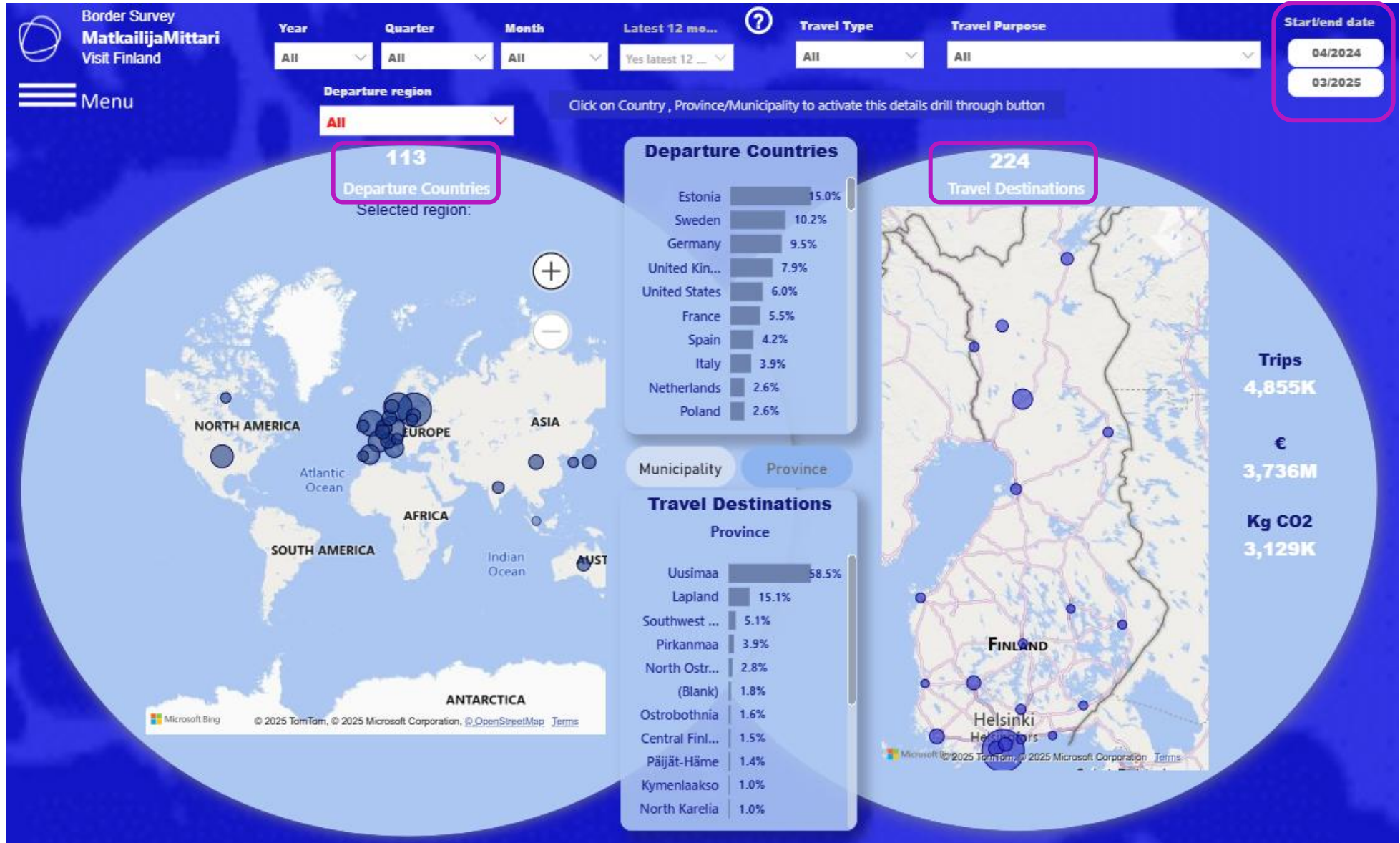


Border Survey / Latest 12 months (Apr 2024 – Mar 2025)

Foreign visitors in Finland

[Link to the report:](#)

[Matkailijamittari - Visit Finland](#)



Top5 source markets for leisure/personal trips

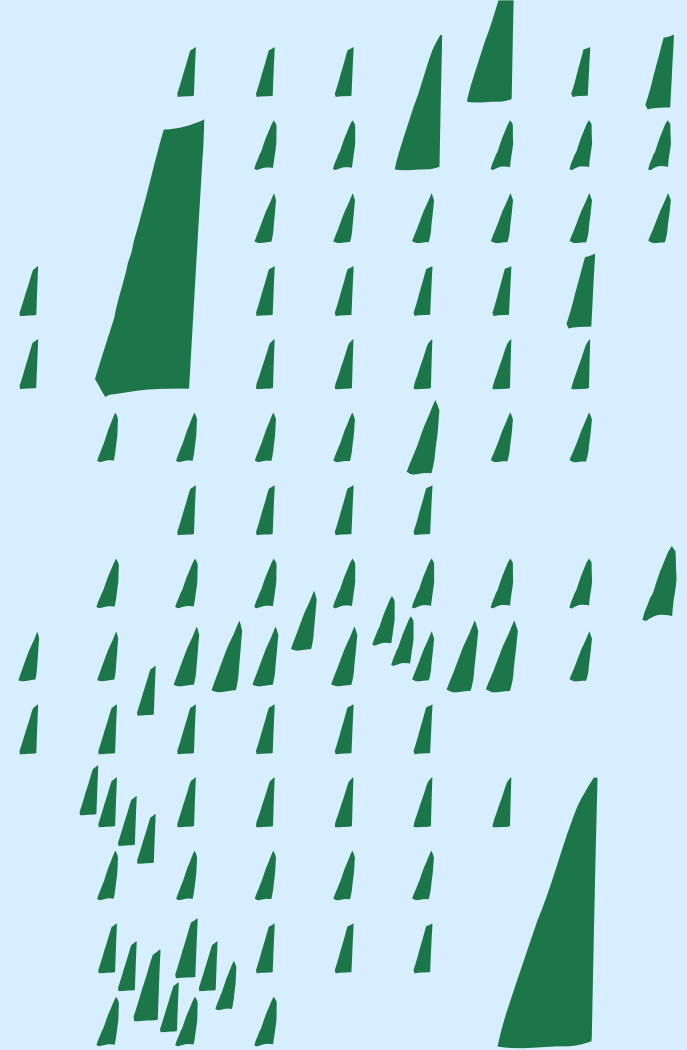
- Estonia
- Germany
- Sweden
- UK
- USA

Top5 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Poland

Border Survey

Q1-2025

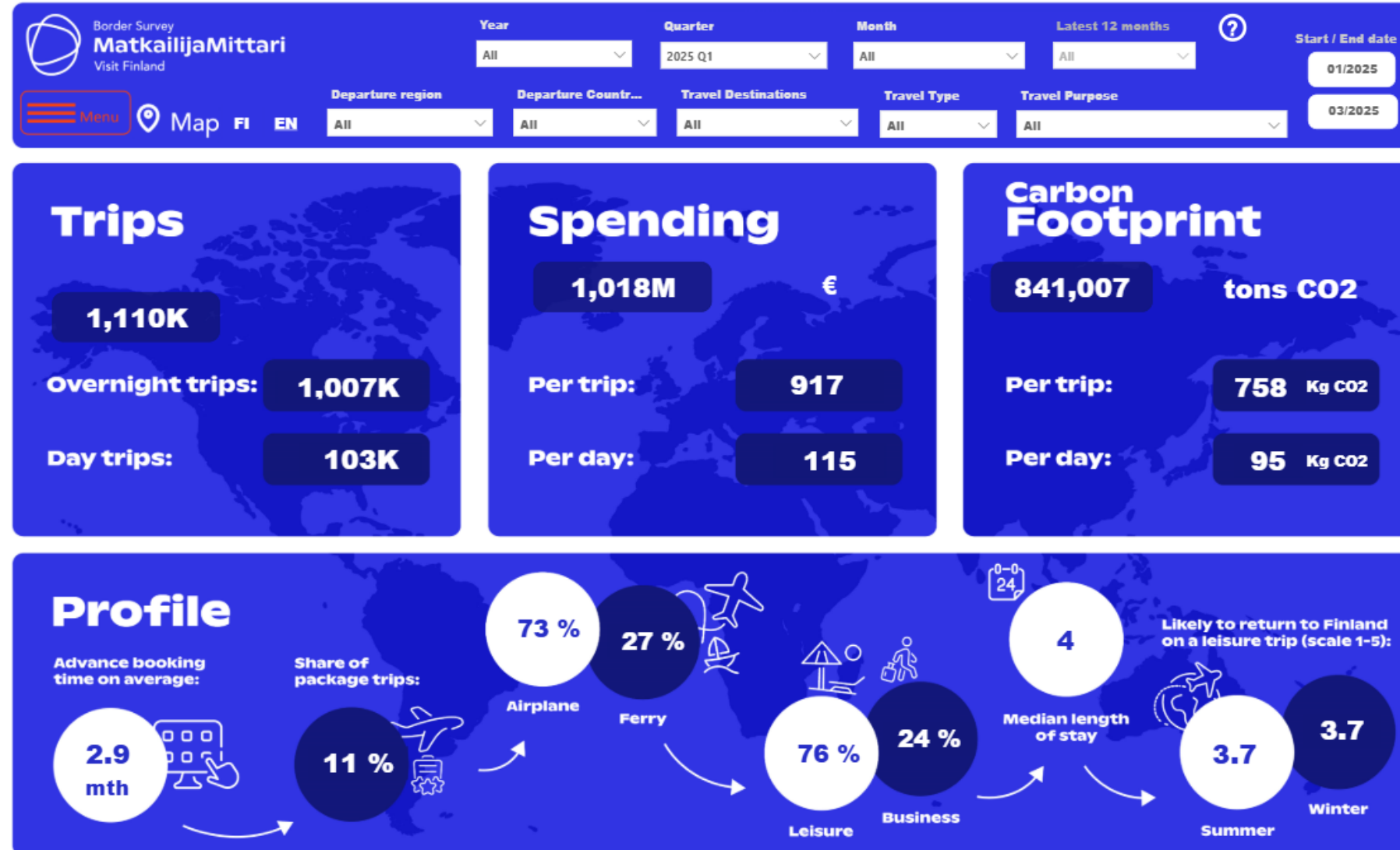


Border survey Q1-2025

All foreign visitors in Finland

Q1-2025 vs. Q1-2024

- There were slightly **less visitors** to Finland than during the previous year, but **total spend was higher**, as the **visitors spent more per trip and per day**.
- The trips were **reserved earlier** than during the previous year.
- Compared to previous year the **share of leisure trips was higher**.
- Median length of stay** remained the same as year before

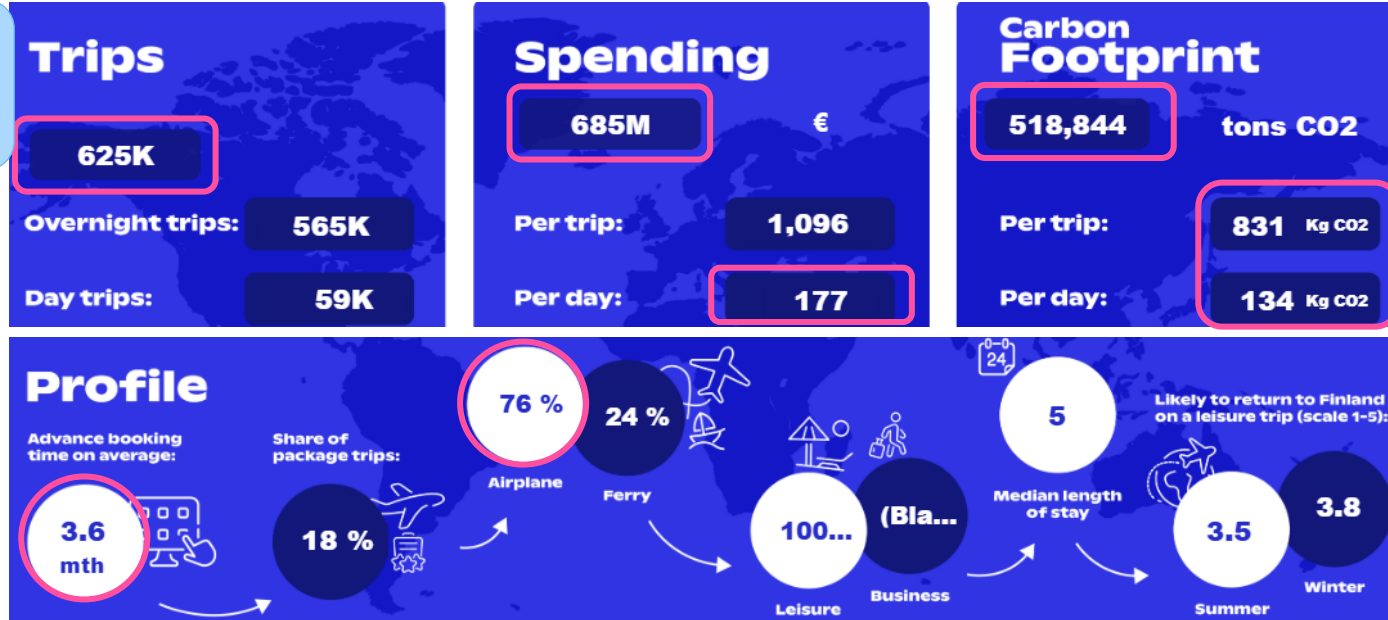


Vacation/recreation travellers during Q1-2025

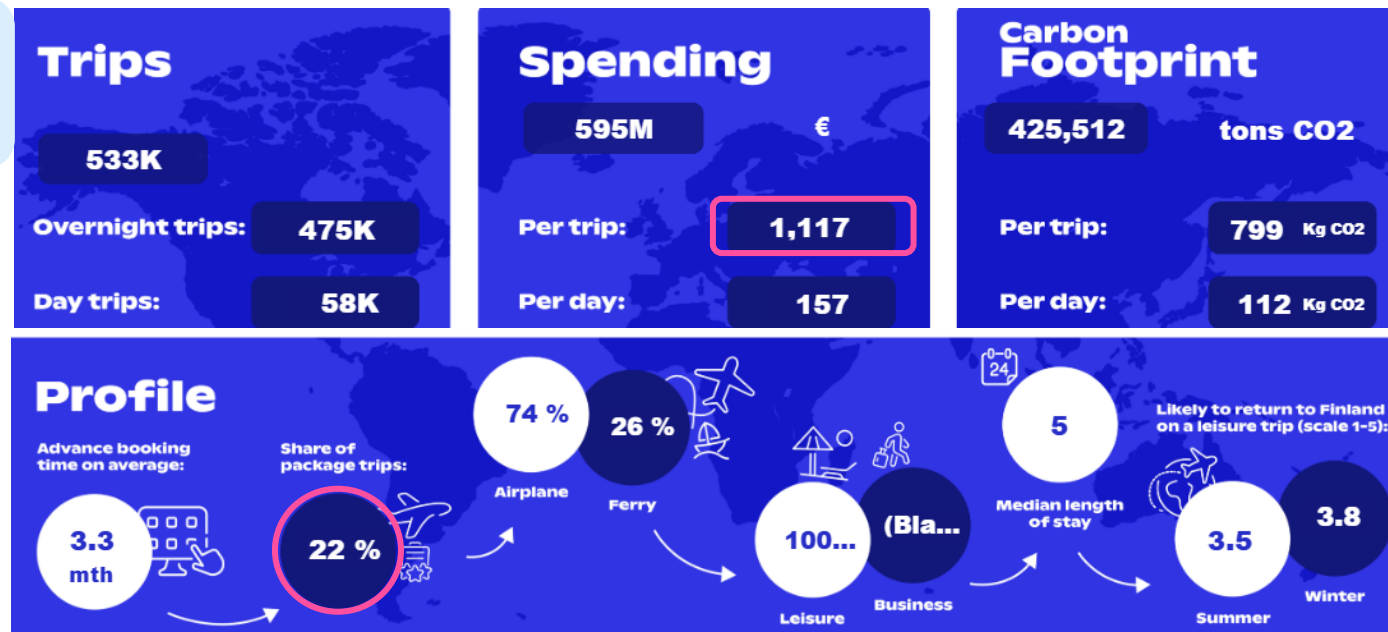
vs. Q1-2024

- There were **625,000 vacation / recreation travellers** visiting Finland during Q1-2025. It was **17% more** than during the previous year.
- Holiday makers also **spent more money** in Finland and the **total spending of 685M€** was **15% more** than a year before. **Spending per trip** was **lower**, but **spending per day** was **higher** than during the previous year, even though the median length of stay remained the same.
- The **average advance booking time** for holiday trips during the first quarter of year 2025 was **longer** than the year before, and the **share of package trips** was **smaller**.

Q1-2025



Q1-2024



Vacation travellers by main source markets

France and Germany were the biggest source markets and had the highest total spend in Finland. Holiday makers from Spain, Italy, and France had the highest spend per day.

Country	Vacation Trips	YoY trips change %
France	89 000	+27%
Germany	80 000	+19%
UK	56 000	+25%
Estonia	39 000	+11%
Netherlands	37 000	+6%
Italy	31 000	-17%
Spain	31 000	+86%
USA	28 000	+15%
Sweden	26 000	+39%
Switzerland	23 000	+78%
Belgium	16 000	-10%
Japan	15 000	+86%

Country	M€ total	YoY € change %
France	122.4	+38%
Germany	99.0	+40%
UK	53.2	+20%
Netherlands	47.4	+2%
Spain	40.9	+173%
USA	40.2	-21%
Italy	31.6	-4%
Switzerland	31.2	+54%
Belgium	18.7	-22%
Japan	16.5	+34%
Estonia	14.0	-27%
Sweden	8.0	-18%

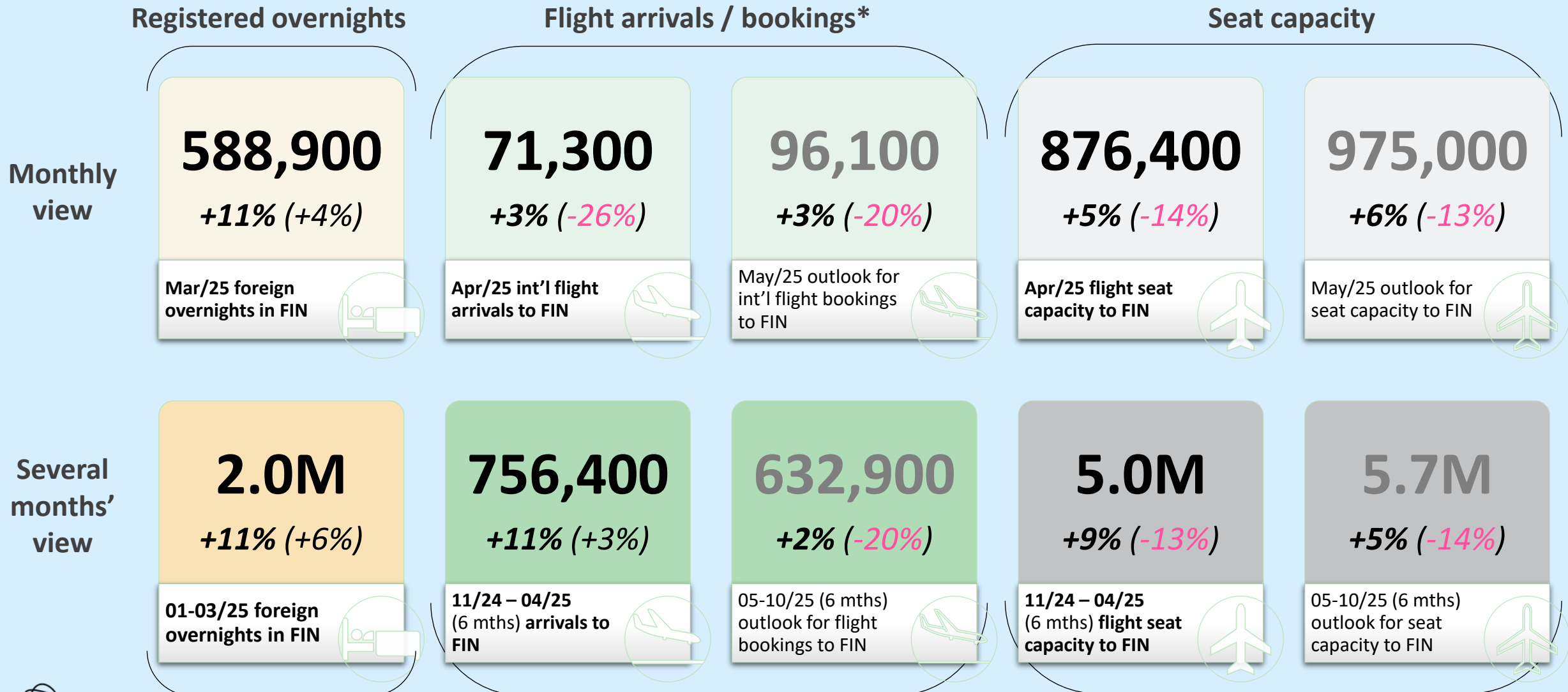
Country	€ / trip	YoY € / trip change %
USA	1,457	-31%
France	1,382	+9%
Switzerland	1,356	-14%
Spain	1,336	+47%
Netherlands	1,284	-3%
Germany	1,238	+17%
Belgium	1,182	-13%
Japan	1,067	-28%
Italy	1,032	+16%
UK	955	-4%
Estonia	355	-35%
Sweden	310	-41%

Country	€ / day	YoY € / day change %
Spain	227	+47%
Italy	218	+16%
France	210	+9%
UK	196	-4%
Netherlands	194	29 %
USA	187	-31%
Belgium	183	-13%
Japan	179	-28%
Switzerland	174	-14%
Germany	169	+17%
Sweden	114	-41%
Estonia	102	-35%

Foreign registered overnights & flight statistics

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

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



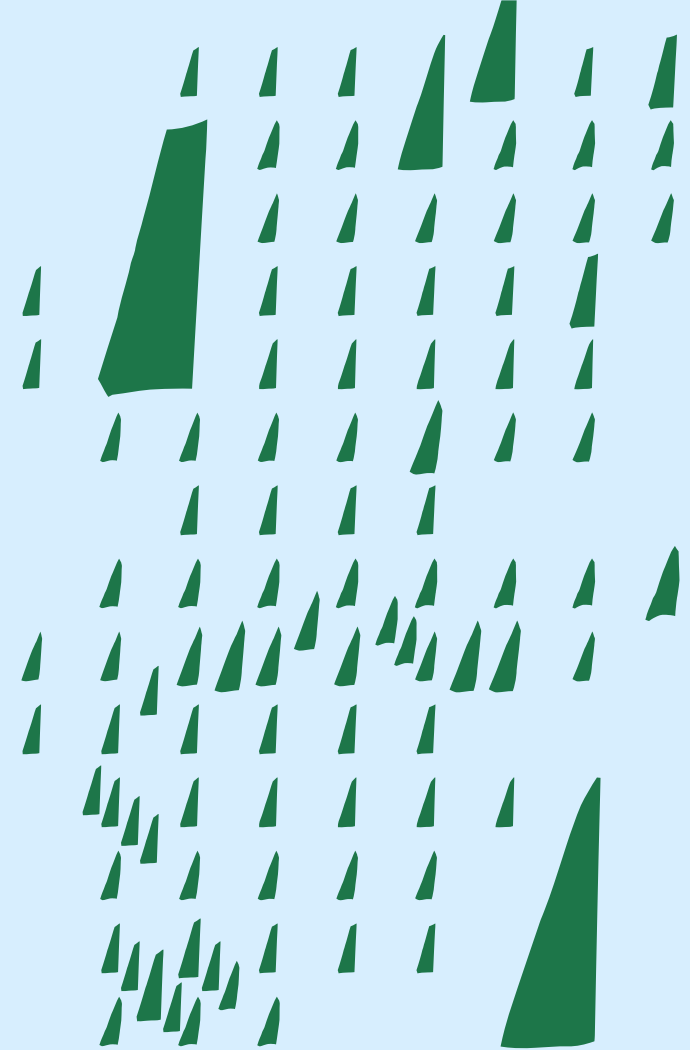
Registered overnights

- Q1-2025

- Number of registered foreign overnights was nearly **2.0 million** with an increase of **10%** compared to previous year. *Number of foreign overnights exceeded also the level of 2019 by 6%.* The biggest source markets were **Germany, France, UK, and the Netherlands.**
- Total accommodation revenue increased by **6%** as the foreign revenue increased by **19%** compared to Q1-2024 (domestic revenue -3%), and **foreign revenue was as high as 47%** of total accommodation revenue.

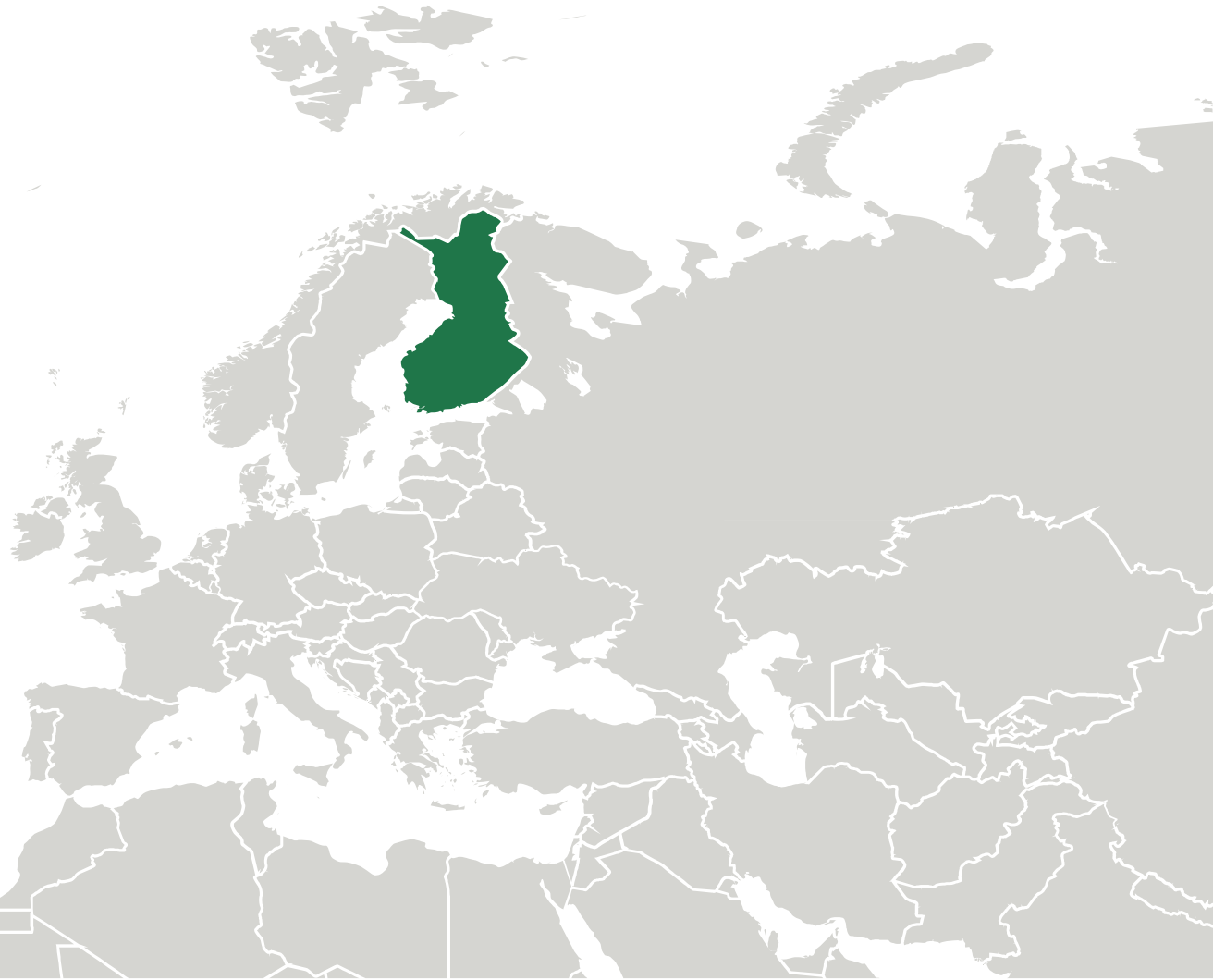
- March 2025

- Record high number of foreign overnights: **588,900** (+11% YoY & +4% vs. Mar 2019)
- Top source markets: **Germany, France and the Netherlands**
- Main destinations: **Helsinki, Rovaniemi**, Inari-Saariselkä, Kittilä-Levi, Vantaa, and Kolari-Ylläs



Registered overnights Q1-2025

	Q1-2025	Change-% vs. Q1-2024	Change-% vs. Q1-2019
Total	5.2M	0%	+1%
Domestic	3.2M	-5%	-2%
Foreign, total	2.0M	+10%	+6%
Foreign excl. Russia	1.9M	+11%	+22%
Scandinavia	139,000	+8%	-2%
EU-27 + UK	1.3M	+4%	+25%
America	135,400	+15%	+81%
Asia	315,300	+39%	+1%



Main source markets

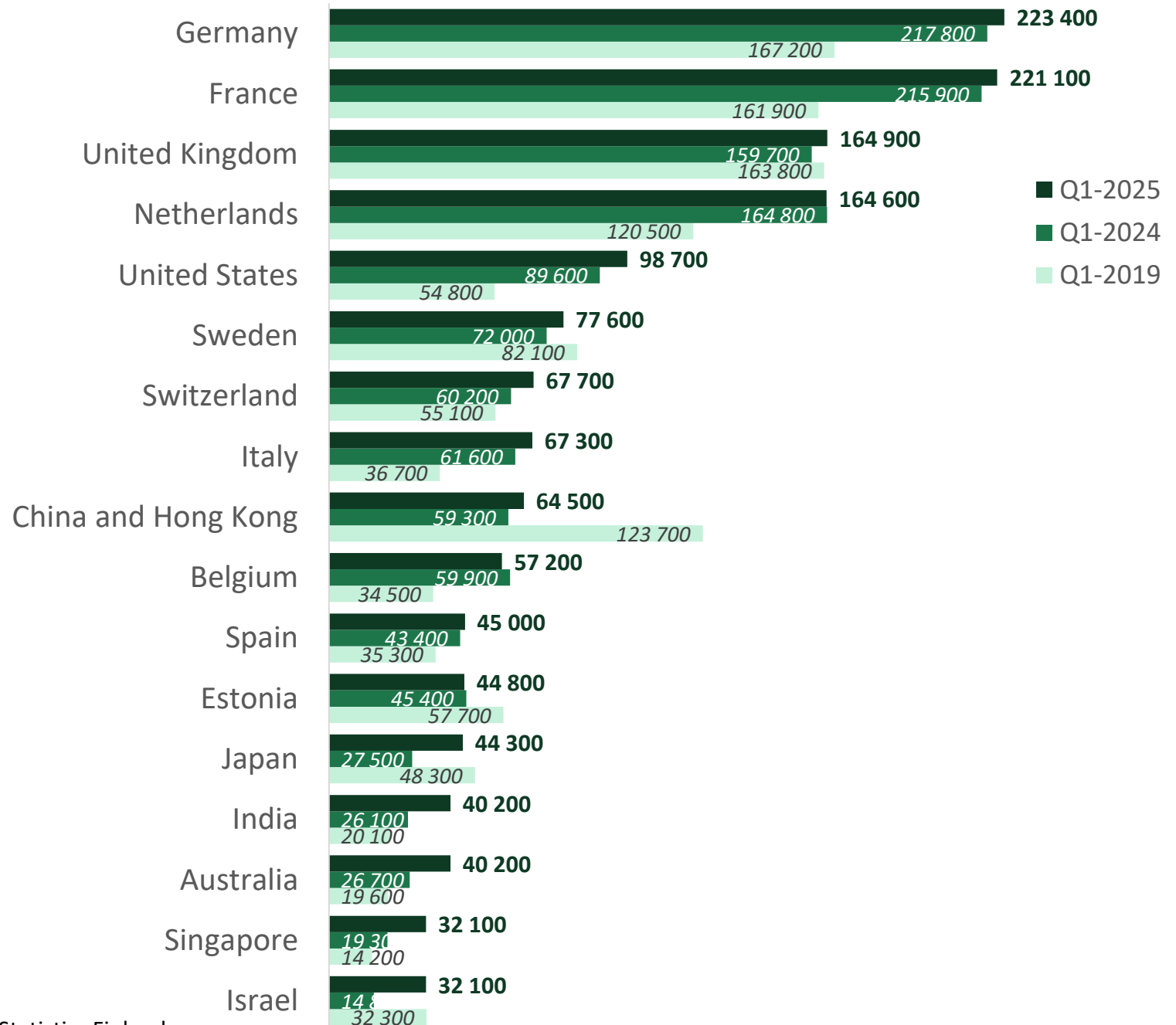
Q1-2025

vs. Q1-2024 & Q1-2019

During Q1-2025, **Germany** and **France** were the biggest source markets by the number of **registered overnights**.

Overnights **exceeded last year's figures in nearly each of the main source markets**, except the Netherlands, Belgium, and Estonia.

When comparing to Q1-2019, overnights still remained below that level in Sweden (-5%), China incl. Hong Kong (-48%), Estonia (-22%), Japan (-8%), and Israel (-1%).





Year

2019 2020 2021 2022 2023 2024 Latest

Year month

Jan Feb Mar

Overnights 5.2M TOTAL overnights	YoY change % 0 YoY change %	Foreign 2.0M Overnights	YoY change % 10.5 Foreign	Domestic 3.2M Overnights	YoY change % -5 Domestic	Revenue 387.1M TOTAL revenue	YoY change % 6 YoY change %
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View Main regions, Regions by

Domestic

Foreign

VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

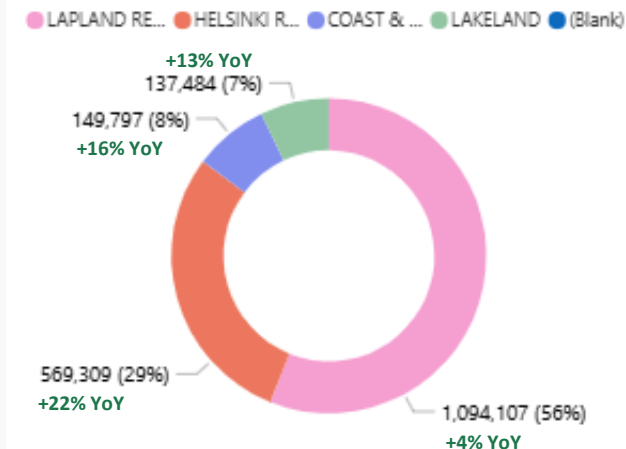
OVERNIGHTS FOREIGN REGION 2025,
202501-202503

Foreign excluding Russia	1,947,783
Europe	1,366,985
EU-28	1,253,904
EU-27 excluding UK	1,088,997
Asia	315,264
Scandinavia	139,020
America	135,405
Oceania	42,518
Africa	9,709

OVERNIGHTS BY COUNTRY YEAR 2025,
202501-202503

Germany	223,393
France	221,118
United Kingdom	164,907
Netherlands	164,595
United States	98,723
Sweden	77,555
Switzerland	67,722
Italy	67,318
China and Hong Kong	64,517

OVERNIGHTS IN MAIN REGIONS YEAR 2025, 202501-202503



REGIONAL OVERNIGHTS



Sources: Statistics Service Rudolf, Statistics Finland

REVENUE 2025



The share of **foreign overnights** was **38%** of the total number of registered overnights. **Foreign revenue's** share was as high as **47%**.

Revenue
Overnights

Year

2019

2020

2021

2022

2023

2024

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

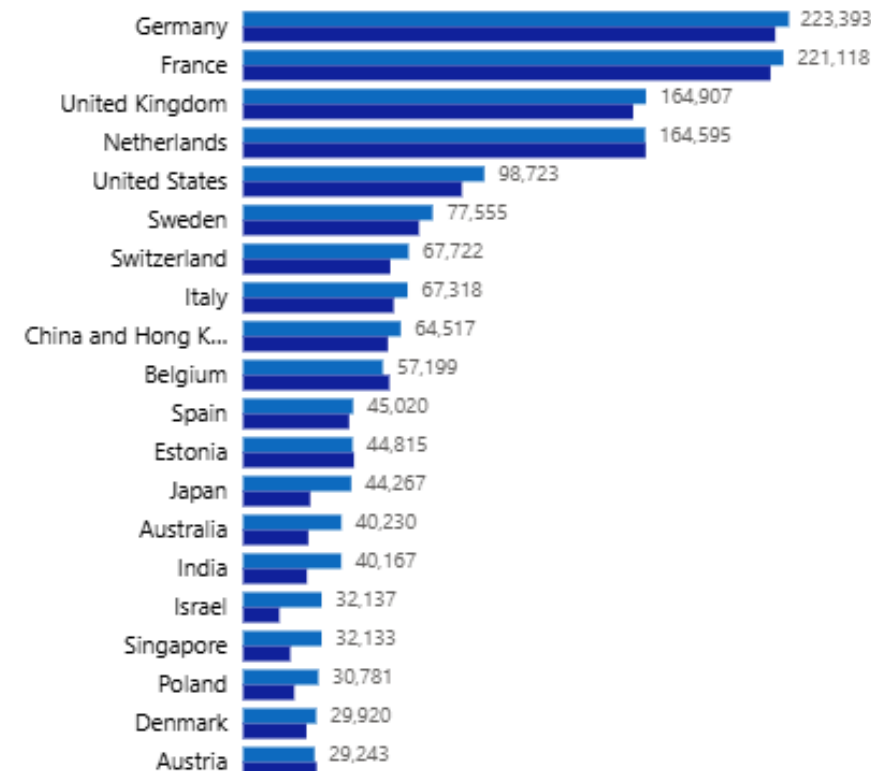
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2025 compared to 2024 months 1-3

Main area	2025 MAX year	2024 MIN year	Change %
LAPLAND REGION	1,094,107	1,048,825	4.3
HELSINKI REGION	569,309	465,239	22.4
COAST & ARCHIPELAGO	149,797	129,509	15.7
North Ostrobothnia (excl. Kuusamo)	53,797	45,294	18.8
Southwest Finland	24,497	21,330	14.8
Uusimaa 2 (excl. Helsinki Metropolitan Area)	19,584	13,808	41.8
Satakunta	14,051	15,312	-8.2
Ostrobothnia	13,649	9,927	37.5
Åland	9,479	11,544	-17.9
Kymenlaakso	6,103	5,185	17.7
South Ostrobothnia	5,732	4,668	22.8
Central Ostrobothnia	2,905	2,441	19.0
LAKELAND	137,484	122,234	12.5
Central Finland	40,648	29,790	36.4
Pirkanmaa	35,084	32,758	7.1
Päijät-Häme	14,491	12,361	17.2
Kainuu	14,288	12,095	18.1
North Savo	11,475	10,031	14.4
South Savo	5,840	7,402	-21.1
North Karelia	5,566	7,721	-27.9
South Karelia	5,258	5,929	-11.3
Kanta-Häme	4,834	4,147	16.6
Total	1,950,697	1,765,807	10.5

OVERNIGHTS 2025 compared to 2024 months 1-3

● MAX year ● MIN year

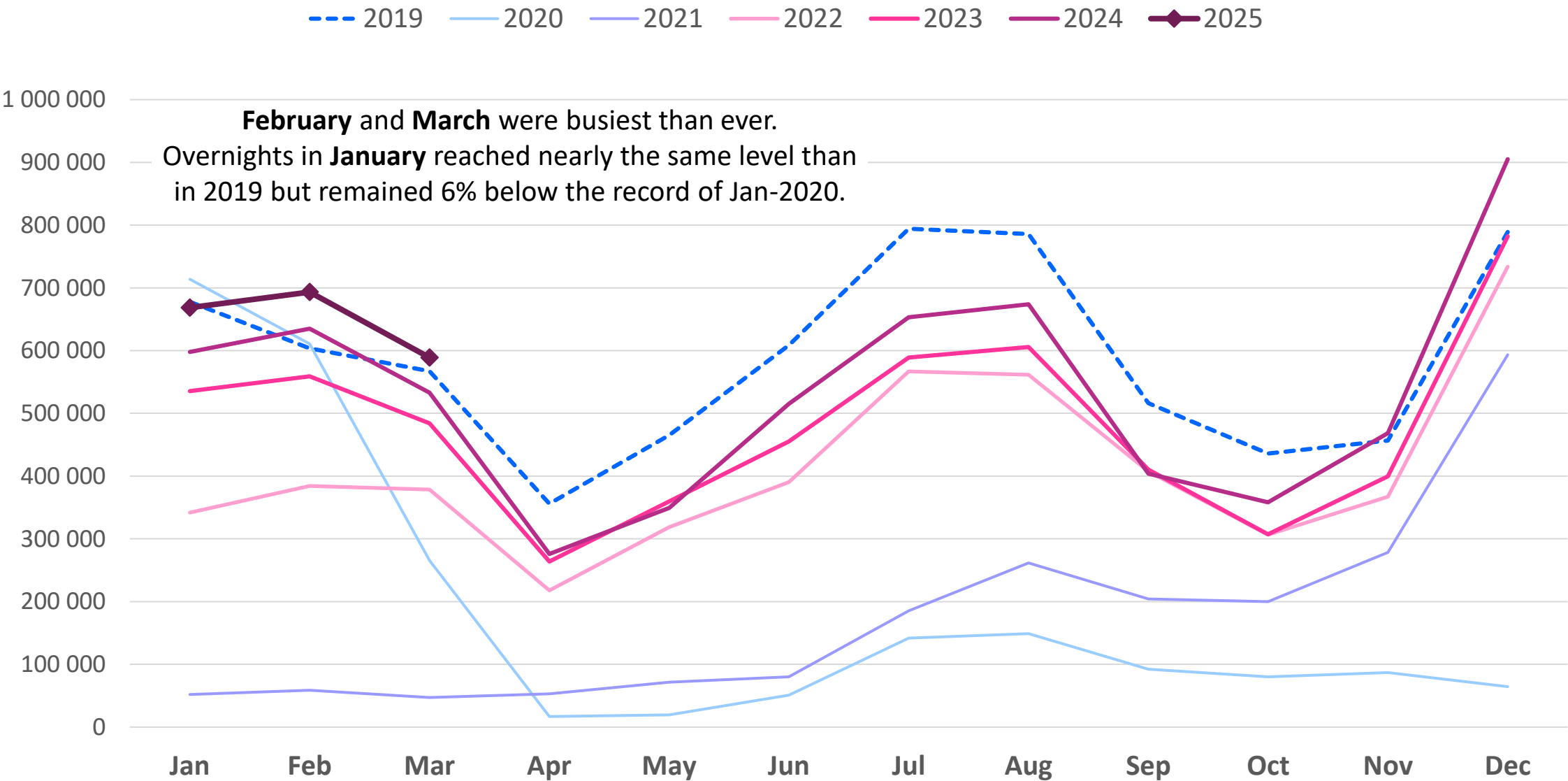


The most popular destinations Q1-2025:

	YoY change
Helsinki	+18%
Rovaniemi	+7%
Inari-Saariselkä	-1%
Kittilä-Levi	+5%
Kolari-Ylläs	+3%
Vantaa	+42%
Kuusamo	+13%
Sodankylä	-10%

From the most popular destinations only Helsinki was slightly below (-1%) the figures of Q1-2019.

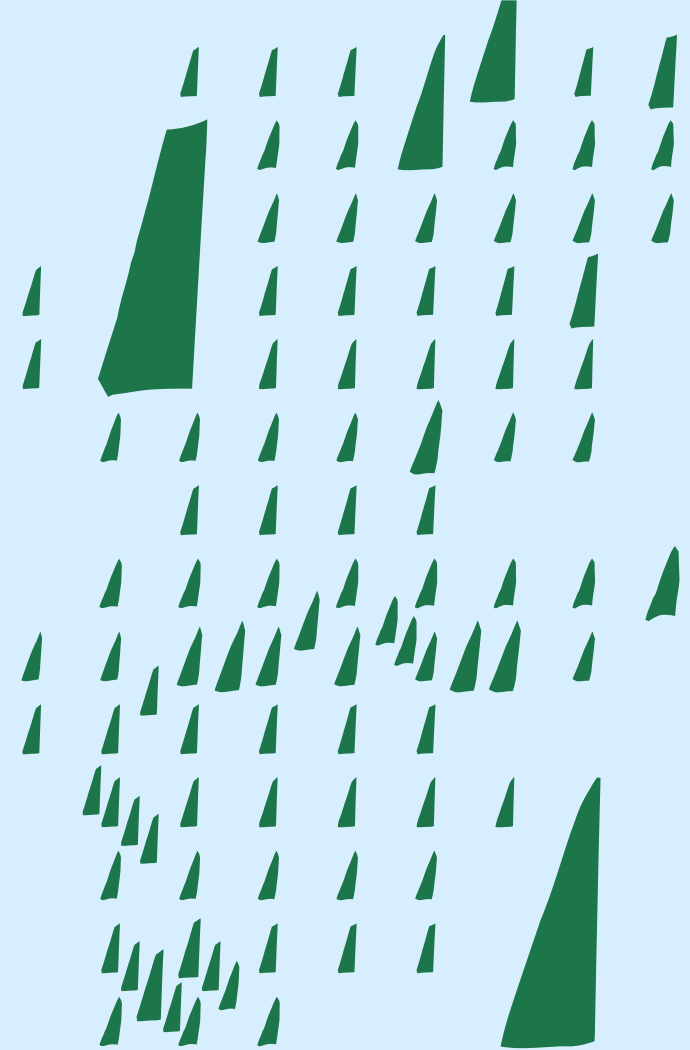
Foreign monthly overnights 2019-2025

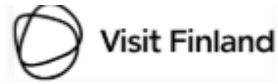


Registered overnights in the Nordics

- **Q1-2025**

- There were **7.7 million** registered foreign overnights in the Nordics excluding Iceland (where currently the accommodation statistics are undergoing revisions). Overnights **increased by 6%** compared to Q1-2024.
- **Finland's market share** among the four countries was **24%**. Sweden was the market leader in the first quarter with a share of 31%, Denmark came second with 25% market share, and Norway came last with 20% market share.
- Relative growth during Q1-2025 was strongest to **Norway** and **Finland**.
- In **Sweden**, foreign overnights decreased slightly compared to previous year.
- Top source markets during the first quarter of 2025 to FI, SE, NO, DK were: **Germany, USA, and UK**.
- **Sweden** receives a big number of visitors **from the other Nordic countries**.





MONTHLY TREND



Year

Latest

Year/Month

All

Nordic country

All

Nordic region

WHOLE COUNTRY

Foreign / Domes...

Foreign

Country

All

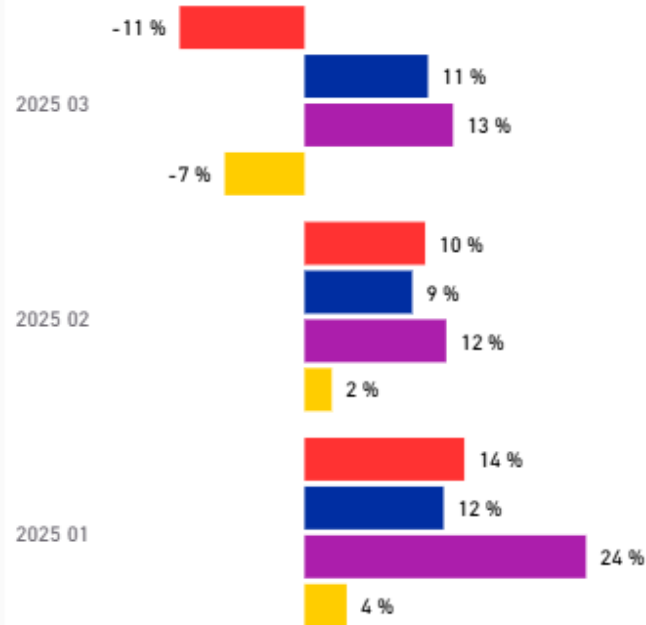
Registered overnights increased to Finland and Norway in March compared to the previous year.

Relative growth has been **strongest to Norway and Finland** during the **first quarter of 2025**.



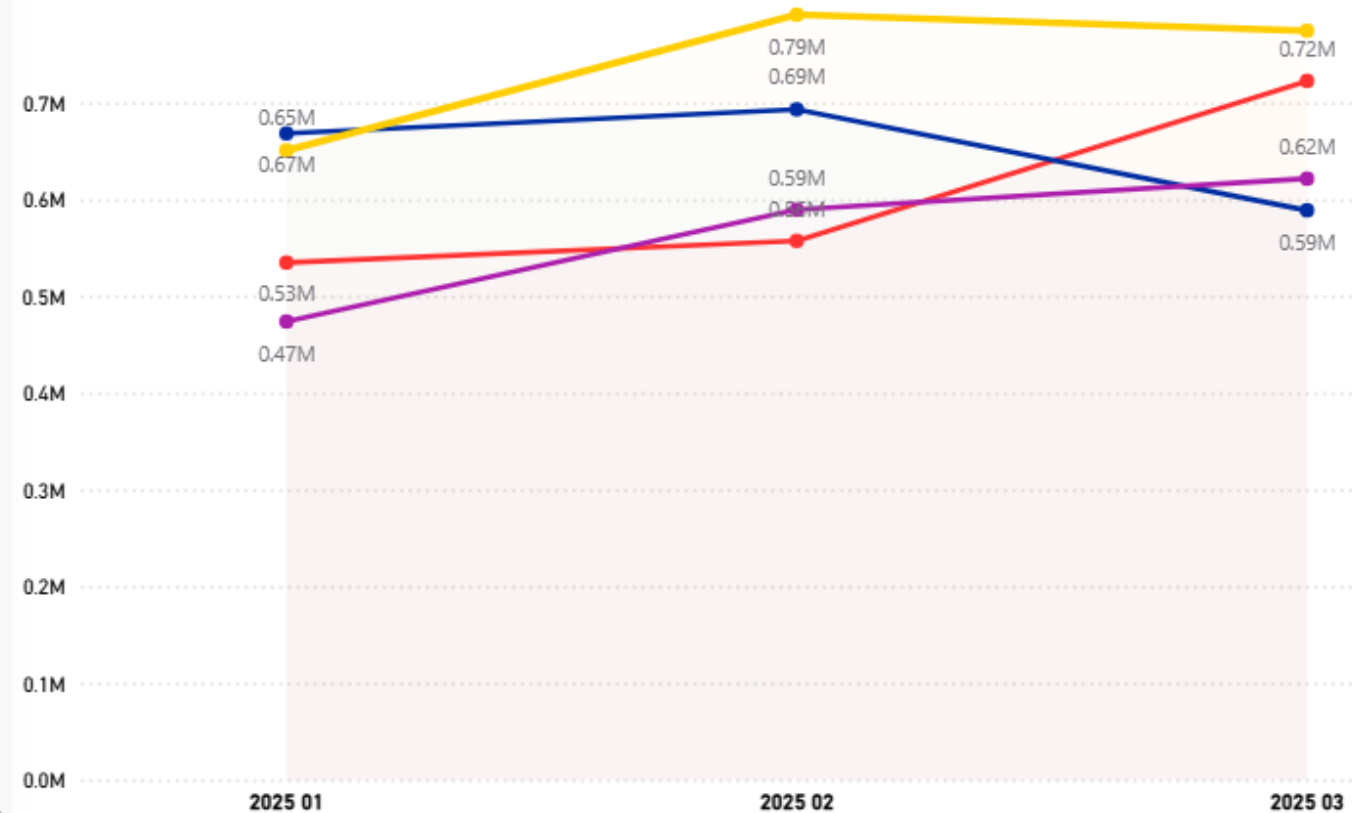
YoY change %
WHOLE COUNTRY Foreign 1.1.2025-31.3.2025

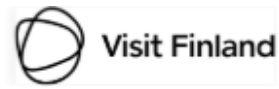
● Denmark ● Finland ● Norway ● Sweden



Monthly overnights
WHOLE COUNTRY Foreign 1.1.2025-31.3.2025

● Denmark ● Finland ● Norway ● Sweden





NORDIC COUNTRIES' SHARE OF YEARLY AND MONTHLY OVERNIGHTS BY TARGET MARKETS

Menu

Year

Latest

Year/Month

All

Nordic region

WHOLE COUNTRY

Foreign / Domes...

Foreign

Country

All

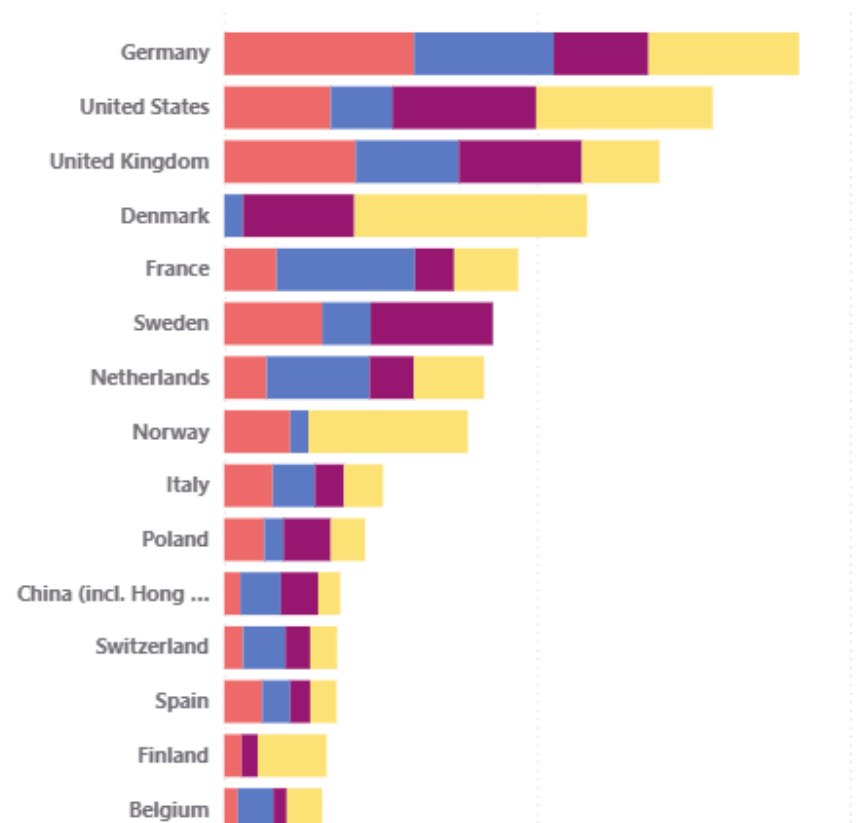
During the **first quarter of 2025**, **Sweden** had the biggest share of foreign overnights in the Nordics.

Biggest source markets for Sweden, Finland, Denmark, and Norway were **Germany**, **USA**, and **UK**.

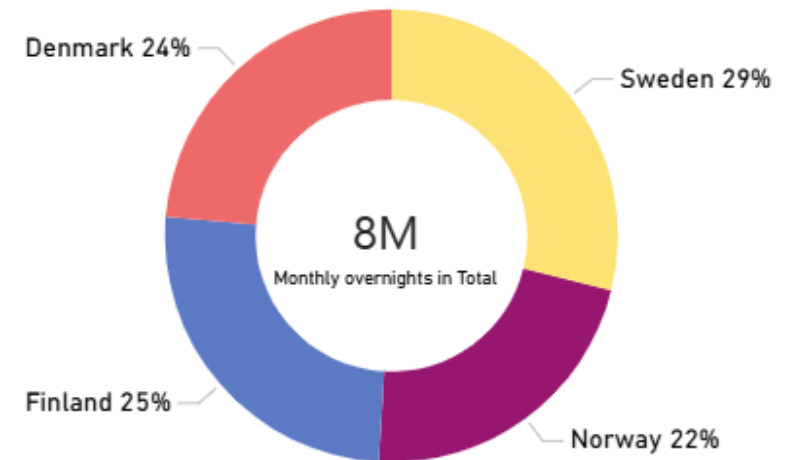
Sweden receives a big number of visitors from the other Nordic countries.

Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2025-31.3.2025



WHOLE COUNTRY Foreign 1.1.2025-31.3.2025

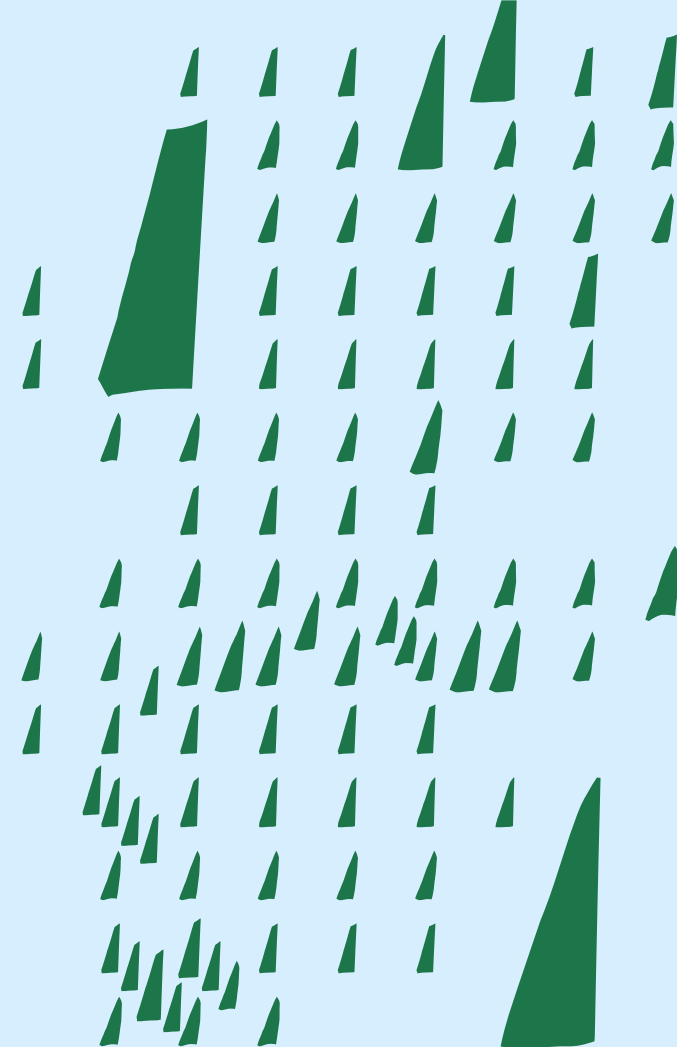


Nordics	Monthly	YoY change %
Sweden	2,216,776	-1 %
Finland	1,950,697	10 %
Denmark	1,814,964	2 %
Norway	1,685,195	15 %
Iceland		

Please note that latest statistics for Iceland are currently not available as they are undergoing revisions.

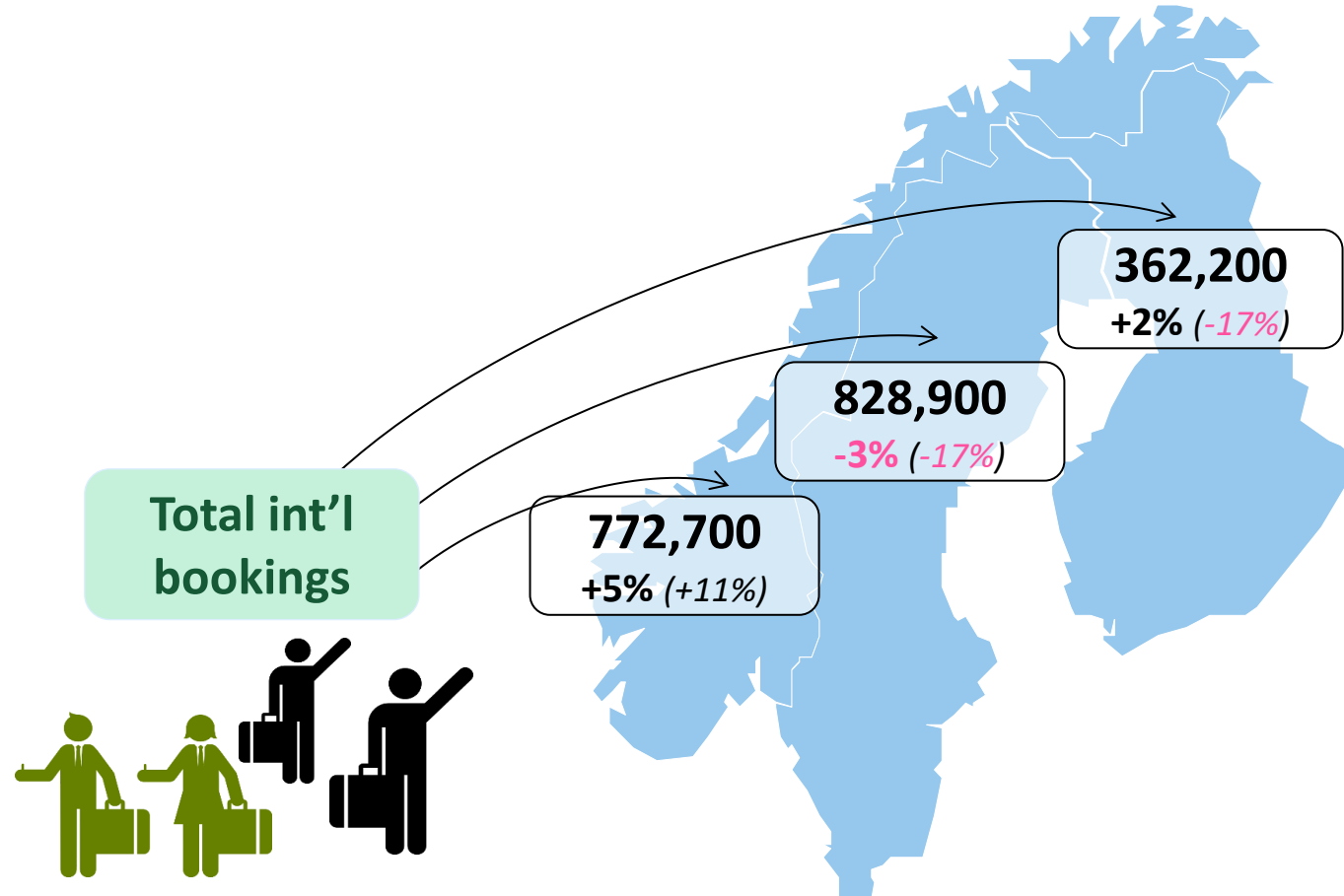
Flight bookings for Jun-Aug 2025

- Airline bookings to Finland for the **summer months** of June – August are **slightly increasing** compared to **last year**. *When comparing to summer 2019, the total int'l bookings are 17% below that level. However, among the main source markets **USA, the Netherlands, Spain, and Poland** show **positive development** compared to 2019.*
- Bookings for the summer months to **Norway** continue to grow when comparing to both previous year as well as to summer 2019. On the other hand, bookings to Sweden are decreasing compared to previous and 2019 summers.



Total int'l bookings to FI, SE & NO for Jun-Aug 2025

Comparison to previous summer and pre-pandemic



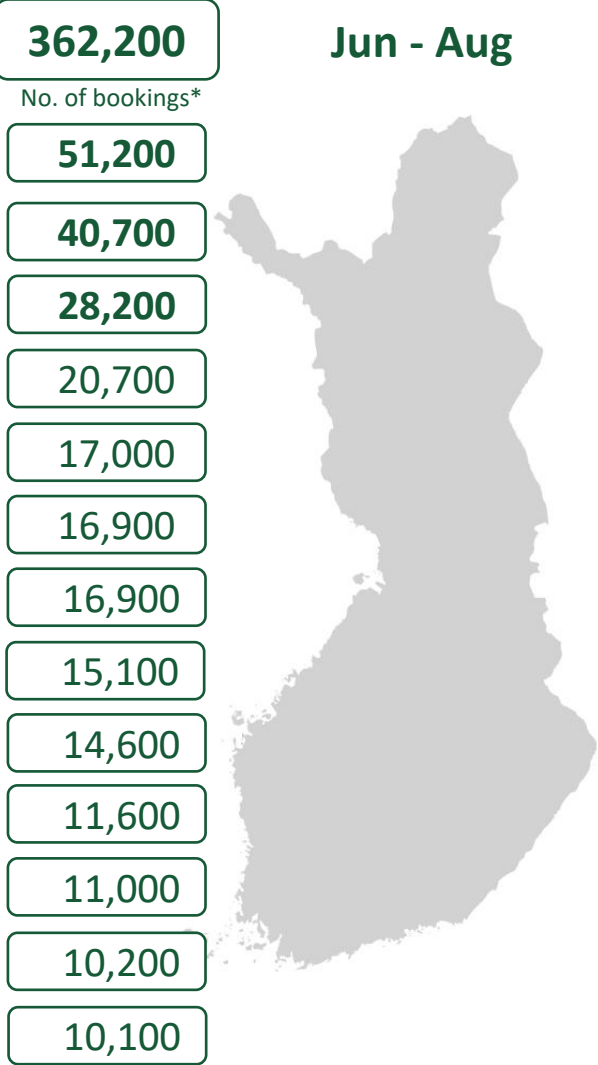
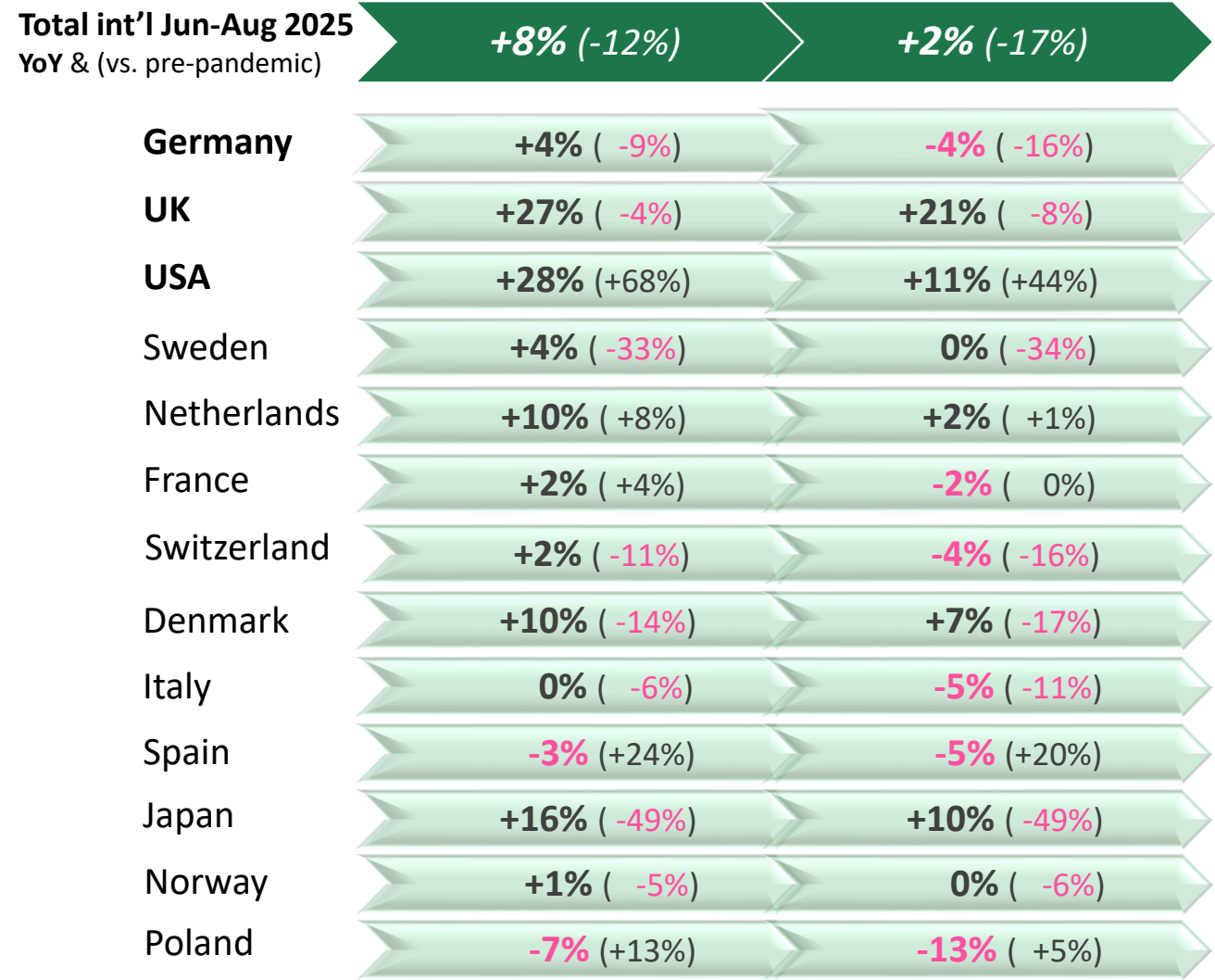
Database update 27-Apr

Follow up on flight bookings* to Finland for June – August 2025

compared to previous year & (pre-pandemic)

*Bookings for Jun-Aug → 30.3.2025

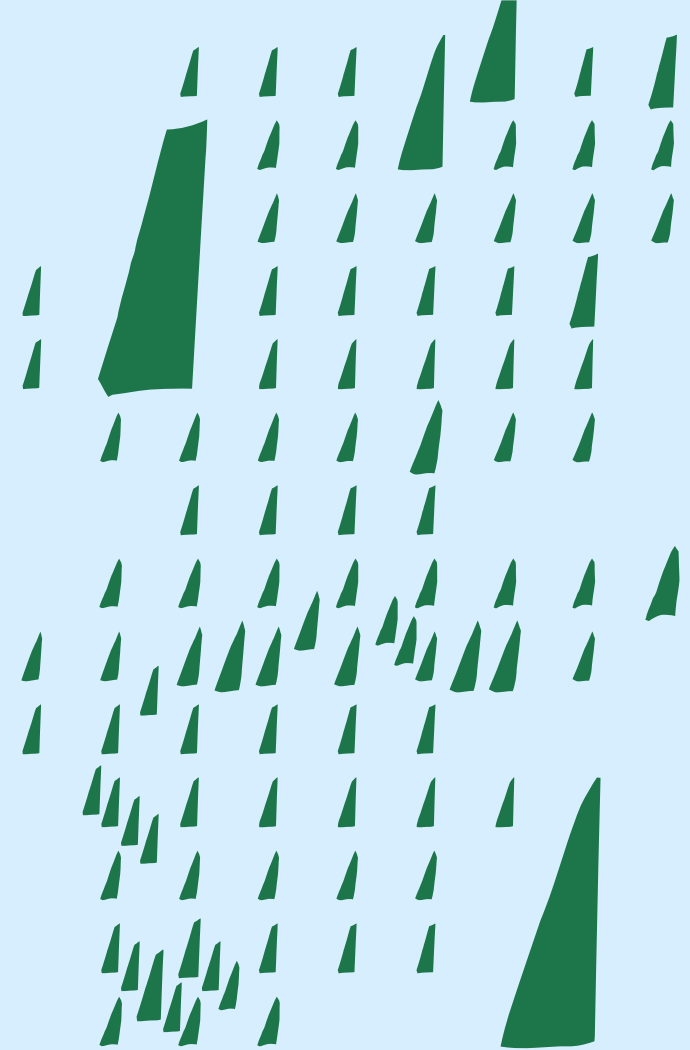
→ 27.4.



Seat capacity on int'l flights

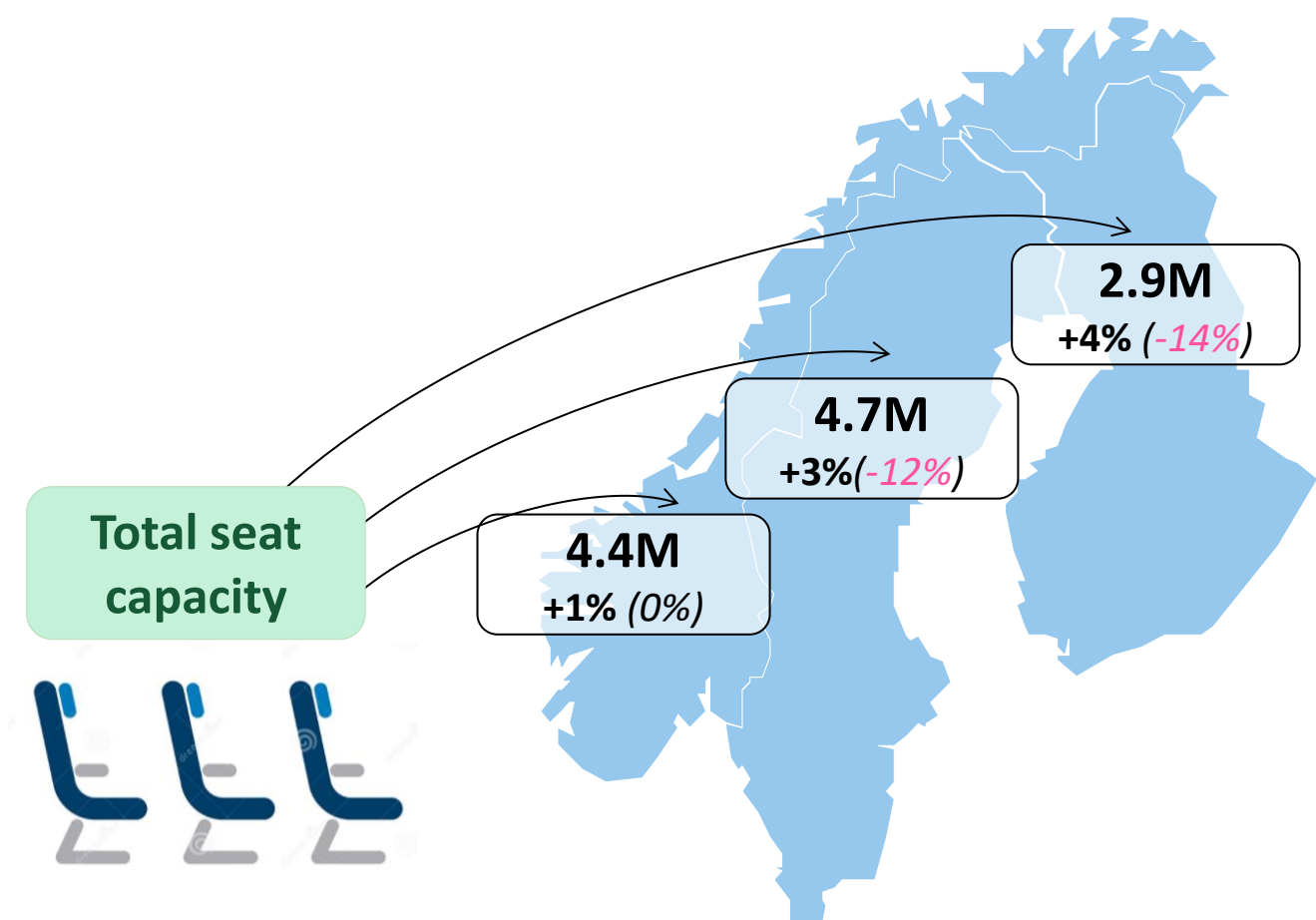
June – August 2025

- **Total int'l seat capacity** for the **summer months** of June – August is **4% above 2024 level**, *but still -14% compared to the pre-pandemic level.*
 - Seat capacity from **Europe** and **Asia** is improving compared to previous summer *but remains below the level of summer 2019.*
 - Seat capacity from **USA** is clearly above both summer 2024 and summer 2019 levels.



Total Seat capacity to FI, SE & NO for Jun-Aug 2025

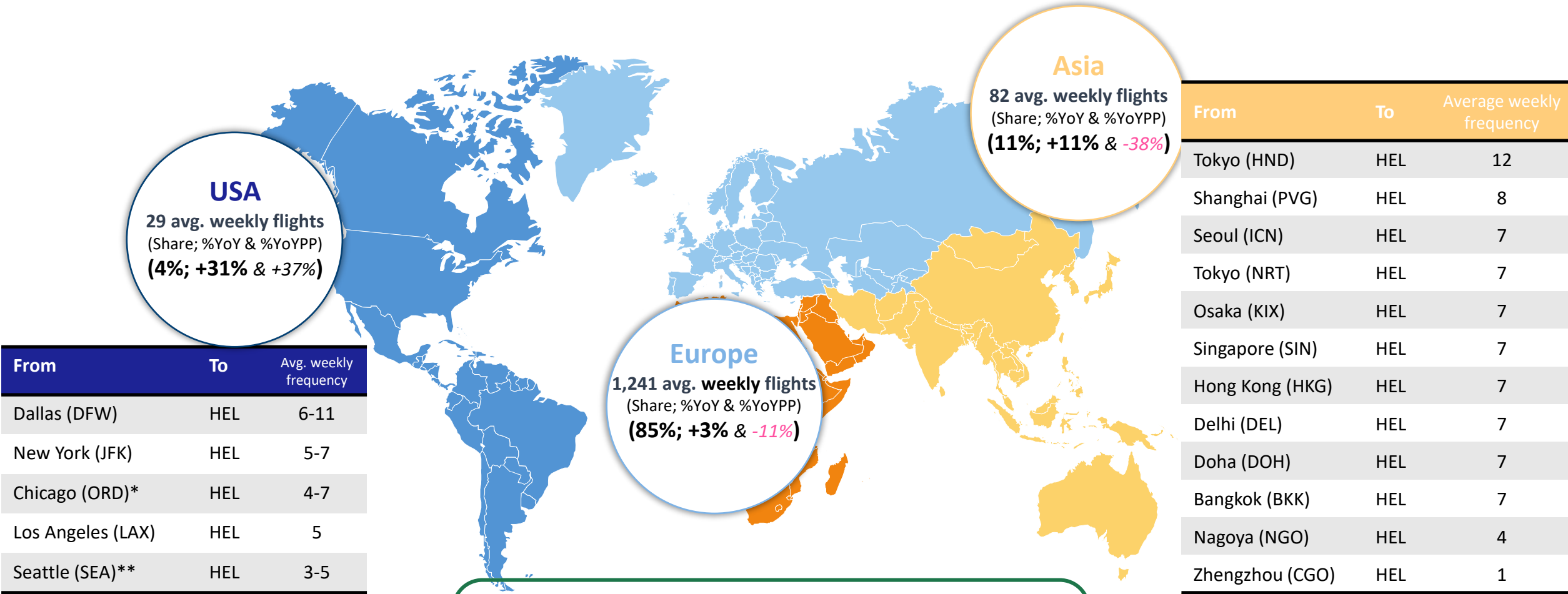
Comparison to previous summer and pre-pandemic



Database update 04-May

Direct int'l flights to Finland Jun-Aug 2025

and change in seat capacity compared to previous summer (& pre-pandemic)



From	To	Avg. weekly frequency
Dallas (DFW)	HEL	6-11
New York (JFK)	HEL	5-7
Chicago (ORD)*	HEL	4-7
Los Angeles (LAX)	HEL	5
Seattle (SEA)**	HEL	3-5

From	To	Average weekly frequency
Tokyo (HND)	HEL	12
Shanghai (PVG)	HEL	8
Seoul (ICN)	HEL	7
Tokyo (NRT)	HEL	7
Osaka (KIX)	HEL	7
Singapore (SIN)	HEL	7
Hong Kong (HKG)	HEL	7
Delhi (DEL)	HEL	7
Doha (DOH)	HEL	7
Bangkok (BKK)	HEL	7
Nagoya (NGO)	HEL	4
Zhengzhou (CGO)	HEL	1

*) ends by end-Aug
) ends by mid-Aug

Total seat capacity to Finland for Jun-Aug 2025

2.9 M

+4% vs. Jun-Aug 2024 & -14% vs. Jun-Aug 2019

EUROPE to Finland / Jun – Aug 2025

From (selected countries)	Share	Seat capacity compared to 2024	Seat capacity compared to 2019
Germany	12%	0%	-16%
Sweden	10%	-3%	-24%
UK	8%	+27%	-12%
Spain	7%	-2%	-19%
Italy	6%	-5%	+24%
Greece	6%	-3%	+15%
Denmark	6%	+7%	-16%
Latvia	5%	+18%	+50%
France	5%	0%	-6%
Netherlands	4%	+3%	+5%
Poland	4%	-10%	-2%
Norway	4%	-4%	-17%
Turkiye	4%	+15%	+31%
Estonia	3%	+3%	+35%
Switzerland	2%	-1%	-3%

Top10 airlines operating
from Europe to Finland

+2.6%
YOY for selected airlines

