



Visit Finland

VF monthly follow up

March 2024

Summary

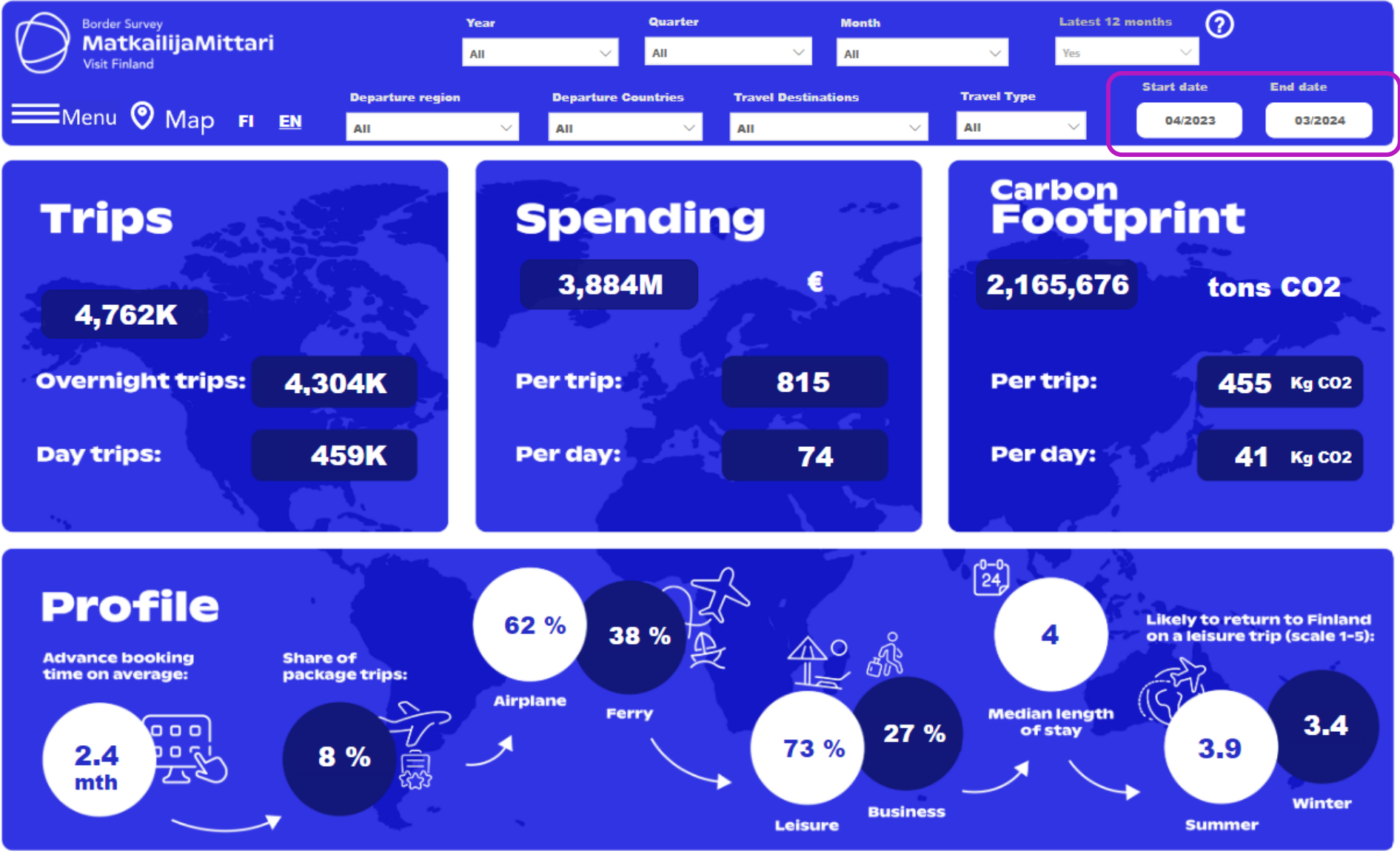
Travel to Finland and to the Nordics compared to previous year and pre-pandemic

- Foreign visitors made **4.8 million trips** to Finland during the **latest 12 months** (April 2023 – March 2024) and they **spent nearly 3.9 billion euros in Finland**. **Median length of stay** was **4 nights** and **73%** of the visitors were travelling for **leisure purposes**.
 - **During Q1-2024** biggest leisure traveller flows came from **Germany, Estonia, and France**. **French** and **German** had the biggest total spend.
 - **In Q1-2024, leisure travellers** reserved their trips to Finland **nearly 3 months before their trip**, share of package trips was **15%**, and the median length of stay was **5 nights**. The **average spend** per trip was **933€** and per day **103€**. In comparison, during Q4-2023 leisure trips were reserved earlier, and the share of package trips was higher. However, the median length of stay was shorter (4 nights) and the spend per day was lower (88€).
- **Number of registered foreign overnights** in **Q1-2024** were **12% above** the figures of previous year, and due to record high February, only 5% below pre-pandemic.
 - Biggest source markets in Q1-2024 were **Germany, France, the Netherlands, and UK**.
- Among the Nordic countries, overnights increased **during Q1-2024** in **Sweden, Denmark, and Norway** both compared to previous year and to 2019.
- **International flight bookings to Finland** for the **summer** months of June - August 2024 show currently **14% increase** compared to 2023. Among the main source markets **USA, the Netherlands, Italy, Spain, and Austria** show positive development also compared to 2019.
 - Bookings to **Norway** are growing very strongly for the **summer** months.
- **Seat capacity to Finland** for June – August 2024 is **14% above** 2023 level, but still -16% compared to the pre-pandemic level.
 - Seat capacity from **Europe, USA and Asia** is **improving** compared to previous summer.

Border Survey / Latest 12 months (April 2023 – March 2024)

Foreign visitors in Finland

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

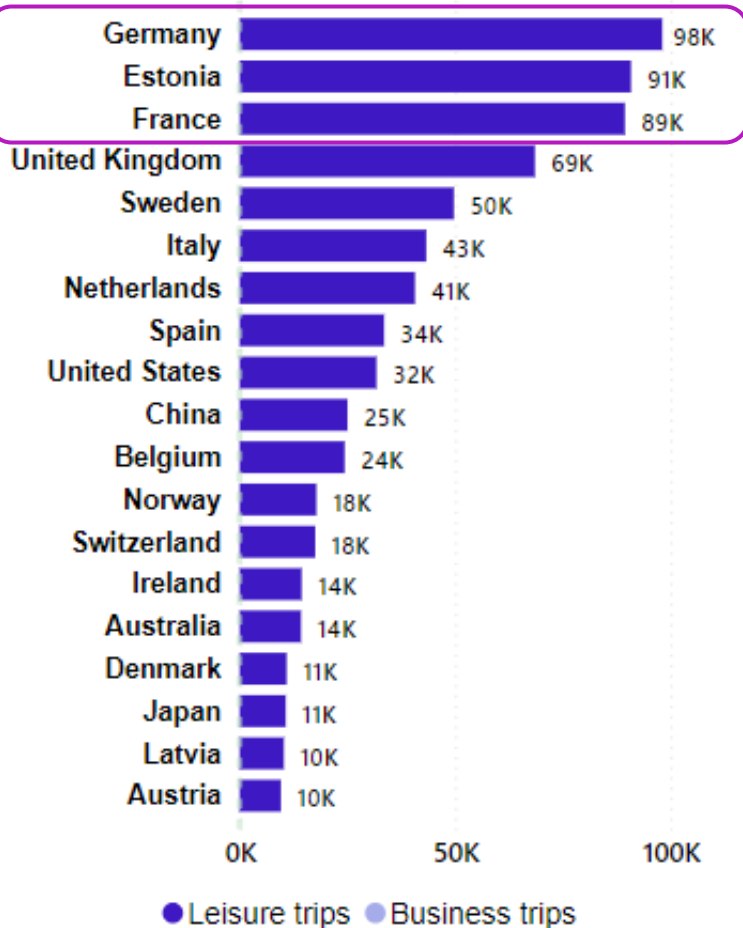


Border Survey / Q1-2024 (January – March)

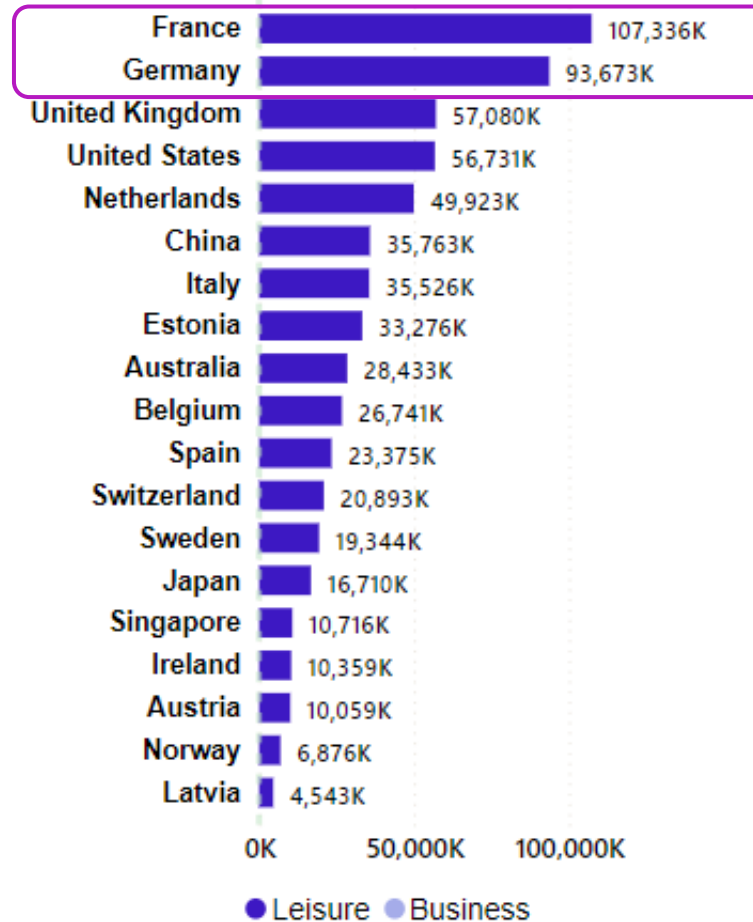
Foreign leisure travellers in Finland

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

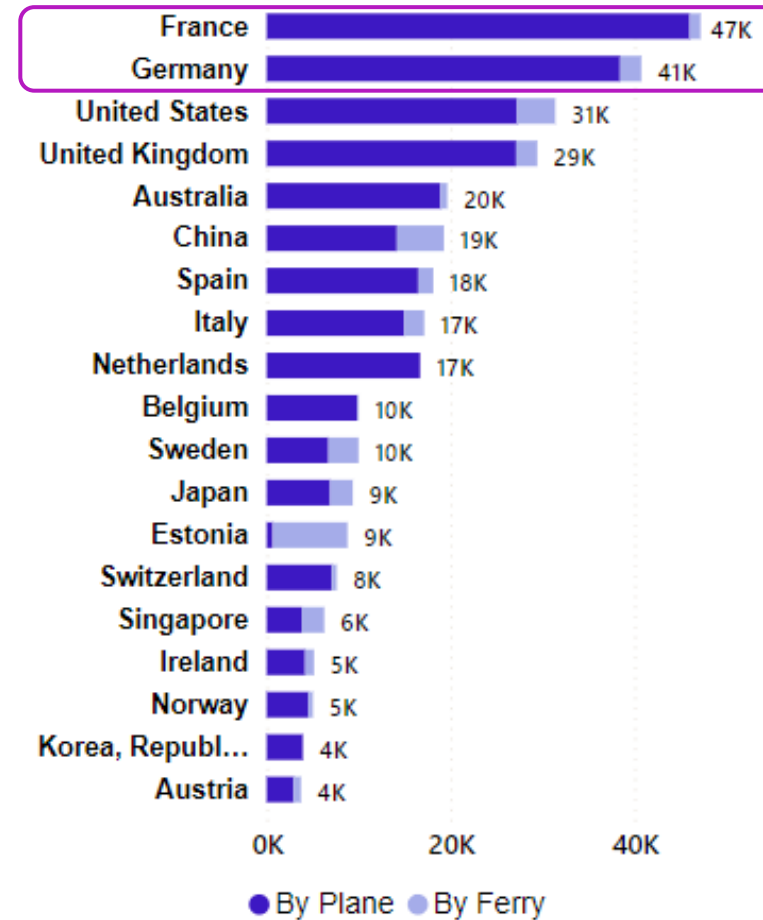
Trips by departure country



Expenditure by departure country



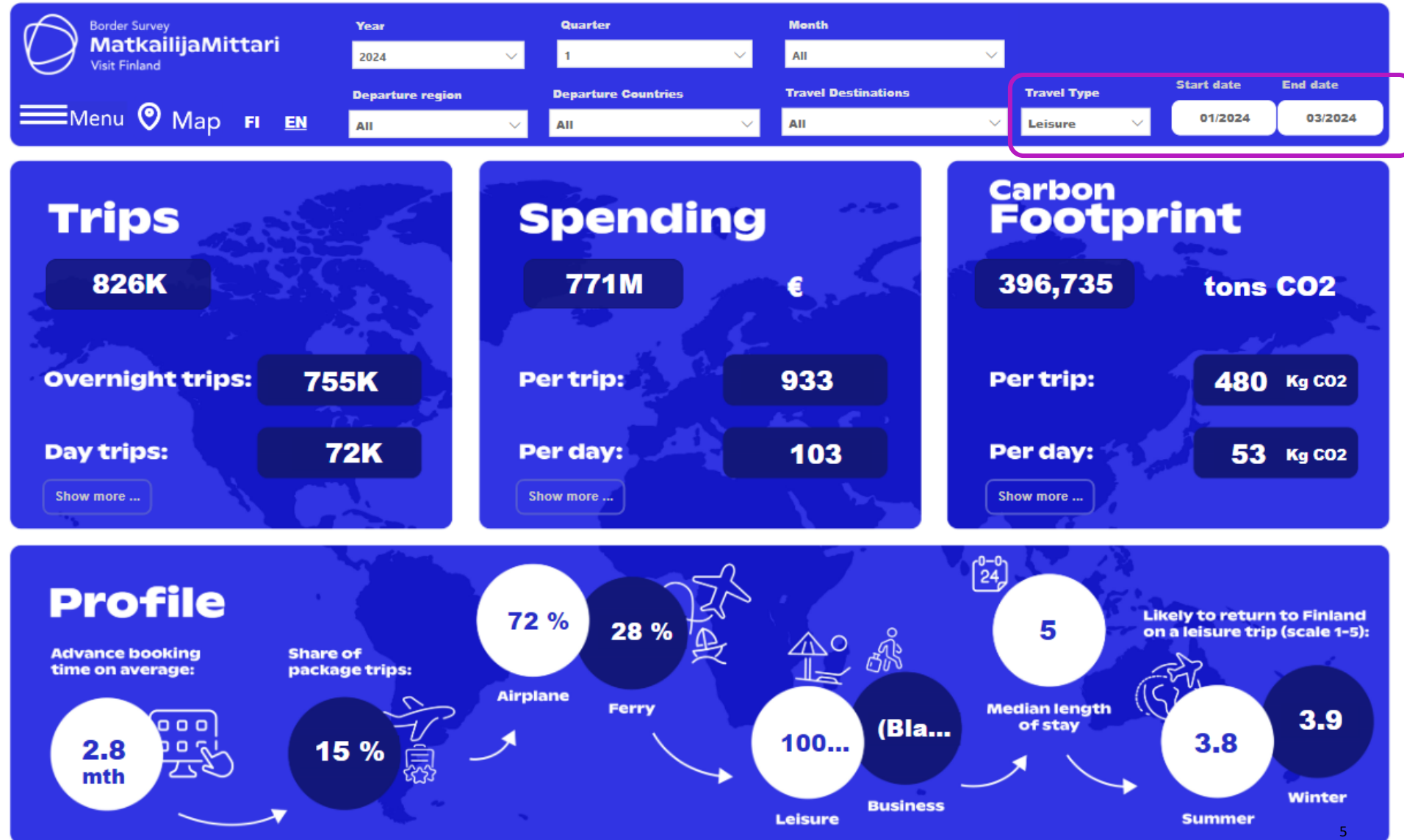
CO2 per departure country



Border Survey / Q1-2024 (January – March)

Foreign leisure travellers in Finland

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



- During Q1-2024, leisure travellers reserved their trips to Finland **nearly 3 months before their trip**, share of package trips was **15%**, and the median length of stay was **5 nights**. The **average spend** per trip was **933€** and per day **103€**.

- During the previous quarter, in Q4-2023, leisure trips were reserved earlier, and the share of package trips was higher. However, the median length of stay was shorter (4 nights) and the spend per day was lower (88€).

Leisure travellers with paid accommodation Q1-2024 vs. Q4-2023

(with overnights spent in hotels, rental cottages or campsites)

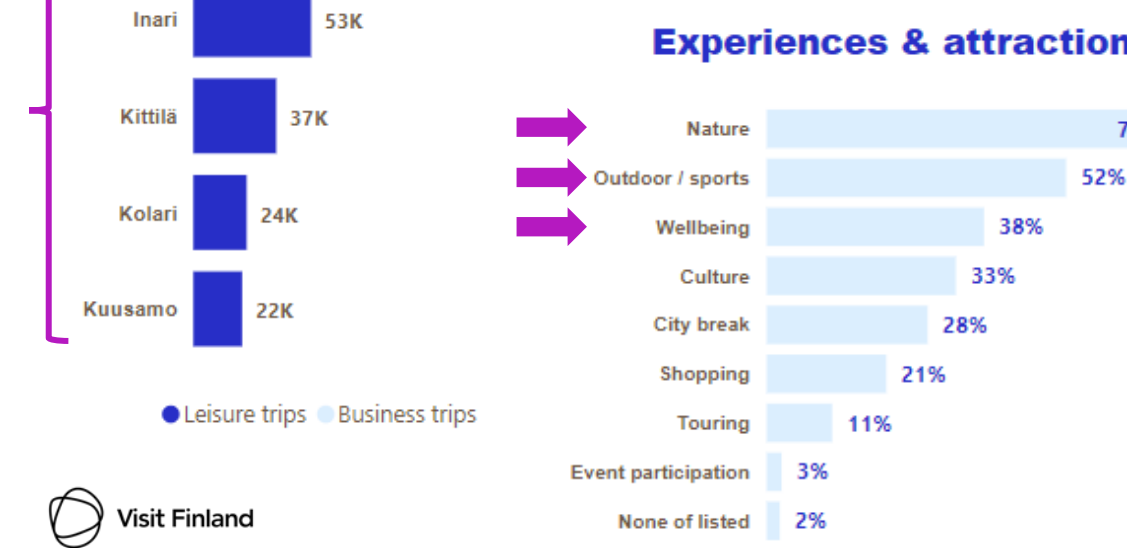
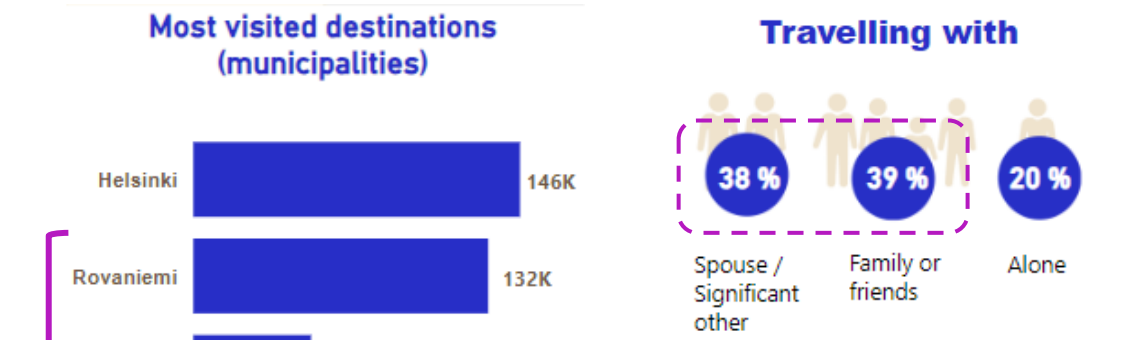
Q1-2024



Trips
497K



Median length of stay
6 Days



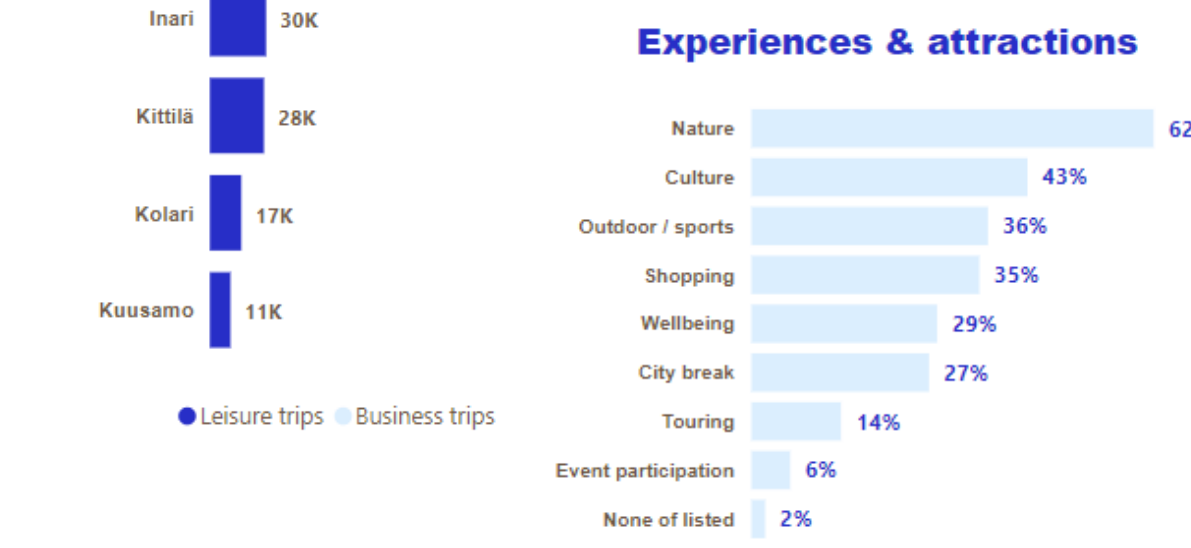
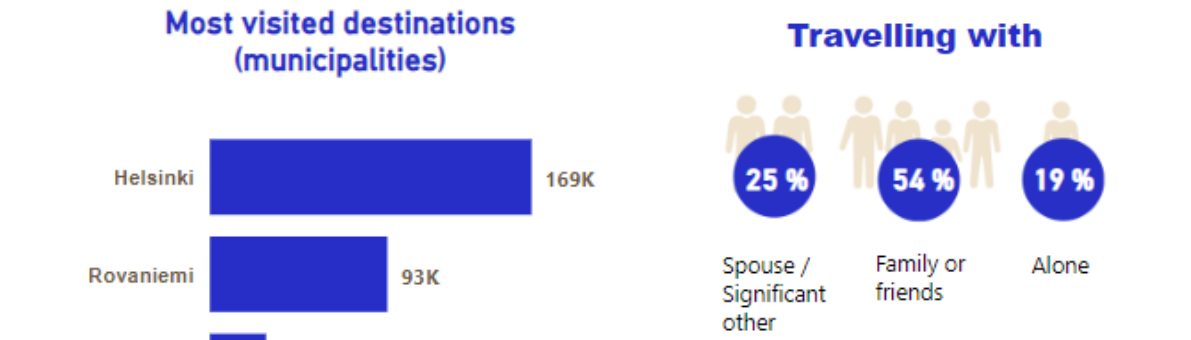
Q4-2023



Trips
429K



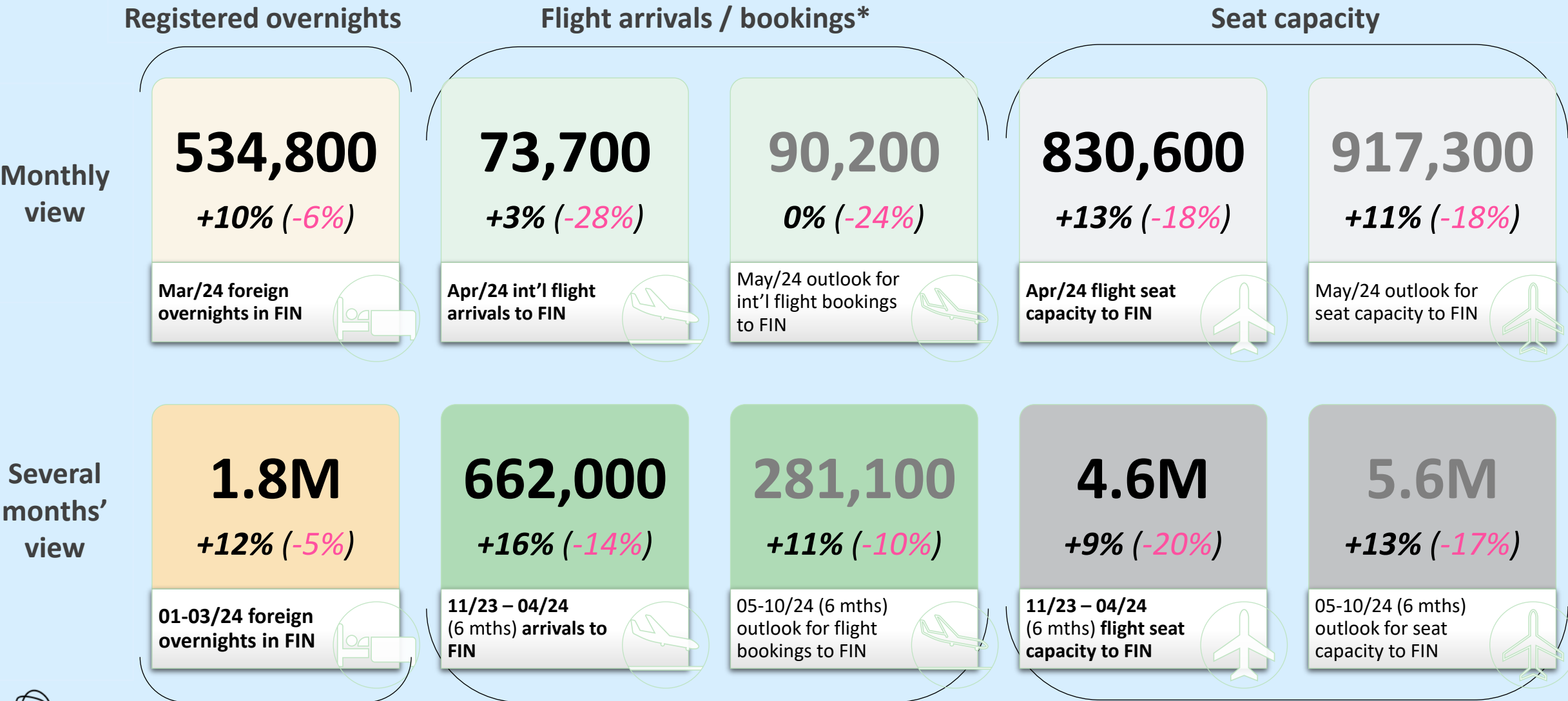
Median length of stay
3 Days



Foreign registered overnights & flight statistics

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

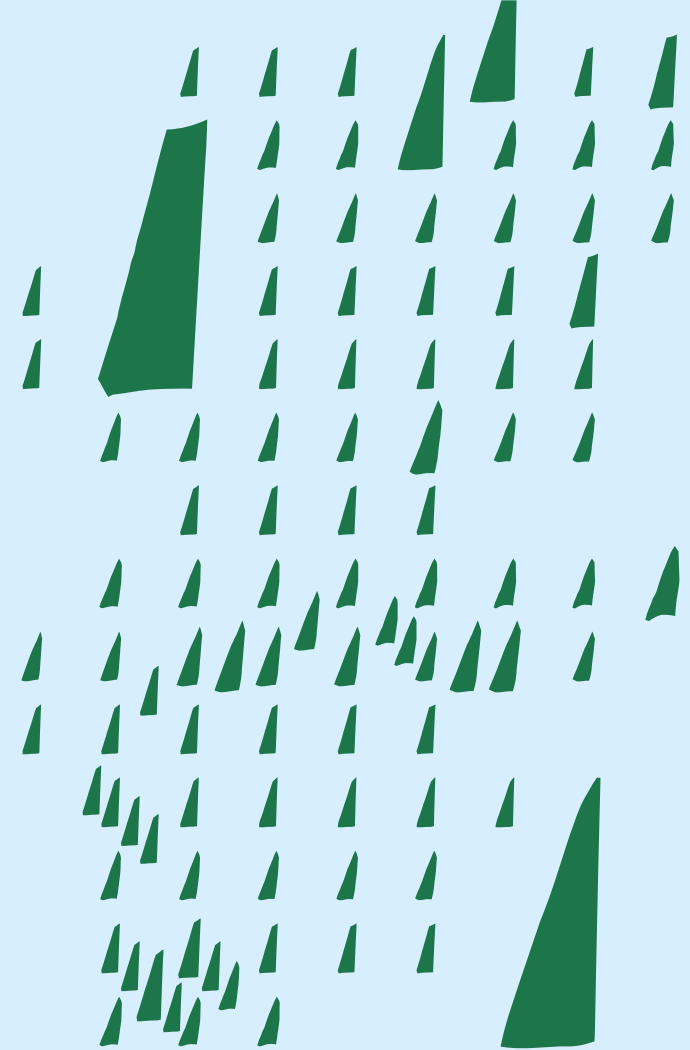
*) Flight bookings including at least 1 night stay in Finland.



Registered overnights

Q1-2024 (January – March)

- Foreign overnights: **1.8 M**
(+12% vs. Q1-2023 & -5% vs. Q1-2019)
- Foreign excl. Russia: **1.8 M**
(+12% vs. Q1-2023 & +10% vs. Q1-2019)
- Top source markets: **Germany, France, the Netherlands, UK**
- Main destinations:
Helsinki, Rovaniemi, Inari-Saariselkä, Kittilä-Levi, Kolari-Ylläs, Kuusamo-Ruka, Sodankylä



Registered overnights Q1-2024

	Q1-2024	Change-% vs. Q1-2023	Change-% vs. Q1-2019
Total	5.3M	+2%	+3%
Domestic	3.5M	-2%	+7%
Foreign, total	1.8M	+12%	-5%
Foreign excl. Russia	1.8M	+12%	+10%
Scandinavia	129,400	+5%	-9%
EU-27 + UK	1.2M	+8%	+20%
America	117,900	+33%	+57%
Asia	226,800	+34%	-27%

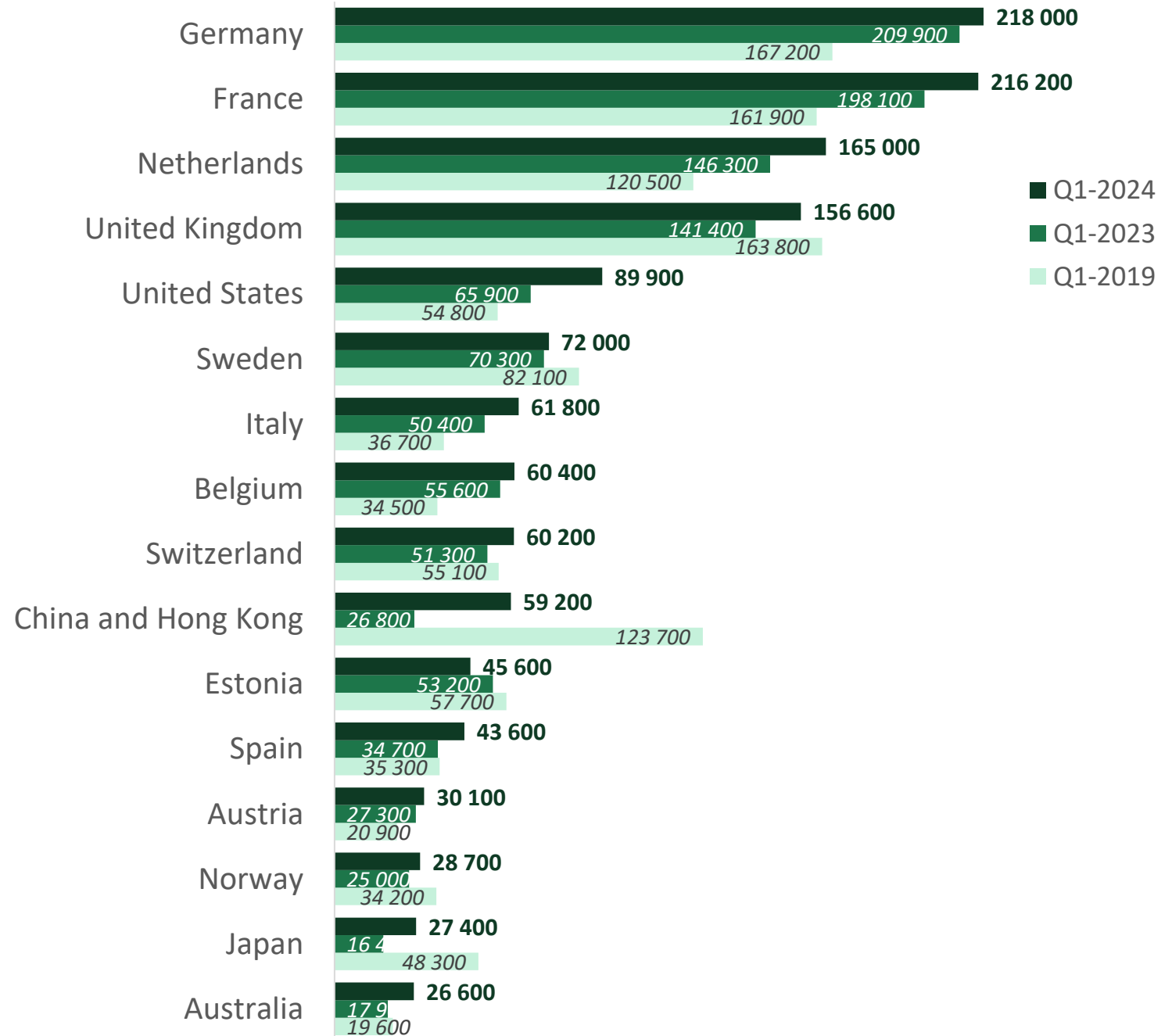


Top16 origin countries

Q1-2024 vs. Q1-2023 & Q1-2019

During Q1-2024, number of overnights exceeded both previous and 2019 figures from these biggest source markets:

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





Registered overnights & Accommodation revenue

RUDOLF STATISTICS

MENU
Monthly YoY comparisons
GO



Year

2018 2019 2020 2021 2022 2023 Latest

Year month

Jan Feb Mar

Overnights
5.3M
TOTAL overnights

YoY change %
2
YoY change %

Foreign
1.8M
Overnights

YoY change %
11.8
Foreign

Domestic
3.5M
Overnights

YoY change %
-2
Domestic

Revenue
377.0M
TOTAL revenue

YoY change %
5
YoY change %

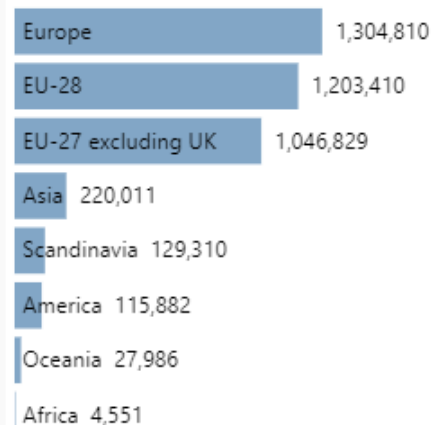
View Main regions, Regions by

Domestic

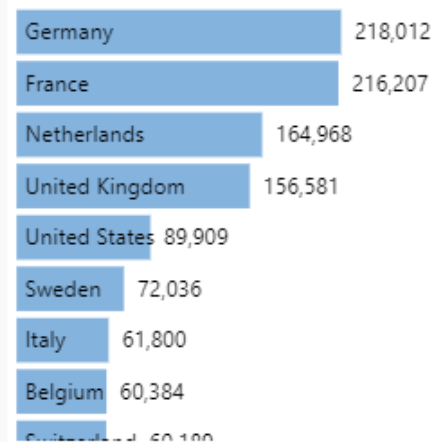
Foreign

REGIONAL OVERNIGHTS

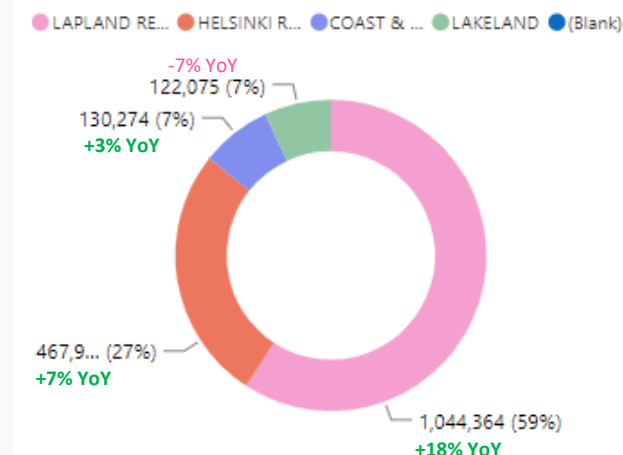
OVERNIGHTS FOREIGN REGION 2024,
202401-202403



OVERNIGHTS BY COUNTRY YEAR 2024,
202401-202403



OVERNIGHTS IN MAIN REGIONS YEAR 2024, 202401-202403



REVENUE 2024



Revenue

Overnights



Sources: Statistics Service Rudolf, Statistics Finland



Registered overnights

RUDOLF STATISTICS - MONTHLY YoY COMPARISONS

MENU

Main page

GO



Year

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

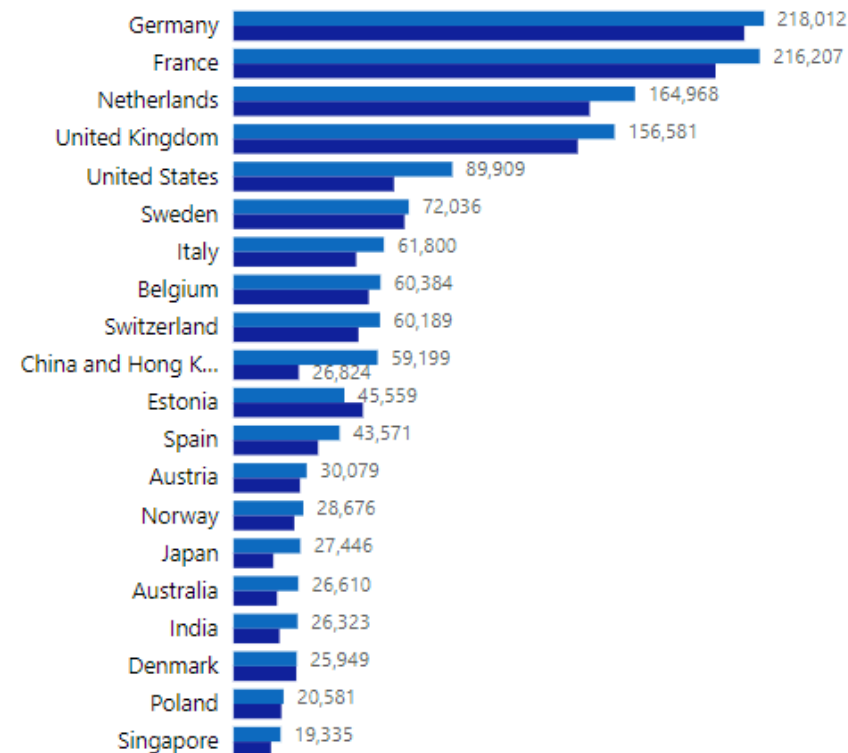
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2024 compared to 2023 months 1-3

Main area	2024 MAX year	2023 MIN year	Change %
⊕ LAPLAND REGION	1,044,364	885,627	17.9
⊕ HELSINKI REGION	467,954	436,024	7.3
⊖ COAST & ARCHIPELAGO	130,274	126,346	3.1
⊕ North Ostrobothnia (excl. Kuusamo)	45,391	40,888	11.0
⊕ Southwest Finland	21,162	22,483	-5.9
⊕ Satakunta	15,312	11,038	38.7
⊕ Uusimaa 2 (excl. Helsinki Metropolitan Area)	14,635	15,479	-5.5
⊕ Åland	11,391	10,488	8.6
⊕ Ostrobothnia	10,139	12,356	-17.9
⊕ Kymenlaakso	5,185	5,162	0.4
⊕ South Ostrobothnia	4,618	5,044	-8.4
⊕ Central Ostrobothnia	2,441	3,408	-28.4
⊖ LAKELAND	122,075	130,711	-6.6
⊕ Pirkanmaa	32,809	33,891	-3.2
⊕ Central Finland	29,823	30,487	-2.2
⊕ Päijät-Häme	12,472	24,017	-48.1
⊕ Kainuu	11,893	12,678	-6.2
⊕ North Savo	10,032	9,447	6.2
⊕ North Karelia	7,776	6,233	24.8
⊕ South Savo	7,510	4,949	51.7
⊕ South Karelia	5,787	5,580	3.7
⊕ Kanta-Häme	3,973	3,429	15.9
Total	1,764,667	1,578,708	11.8

OVERNIGHTS 2024 compared to 2023 months 1-3

● MAX year ● MIN year



Sources: Statistics Service Rudolf, Statistics Finland

The most popular destinations in Lapland during Q1-2024 (vs. Q1-2023):

- Rovaniemi (+15%)
- Inari-Saariselkä (+21%)
- Kittilä-Levi (+15%)
- Kolari-Ylläs (+5%)
- Kuusamo-Ruka (+38%)
- Sodankylä (+30%)



Visit Finland

Rudolf statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

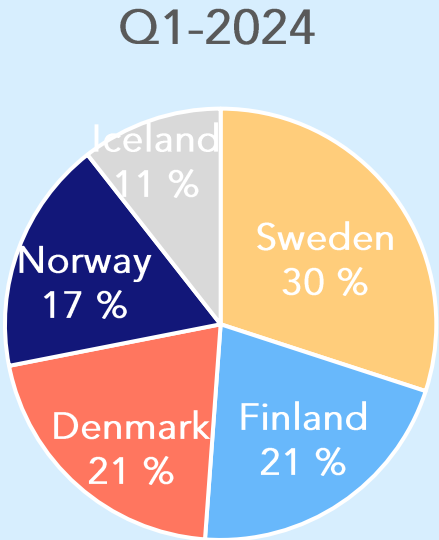
12

Registered overnights in the Nordics

Q1-2024

- Registered overnights increased in Sweden, Denmark, and Norway both compared to previous year and to 2019.

	Q1-2019	Q1-2023	Q1-2024	Change 2024 vs. 2019	Change 2024 vs. 2023
Sweden	2 345 000	2 148 200	2 505 600	+7 %	+17 %
Finland	1 848 300	1 578 700	1 764 700	-5 %	+12 %
Denmark	1 471 300	1 494 300	1 732 800	+18 %	+16 %
Norway	1 243 500	1 189 900	1 460 500	+17 %	+23 %
Iceland	910 600	905 600	884 000	-3 %	-2 %



NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality

Foreign

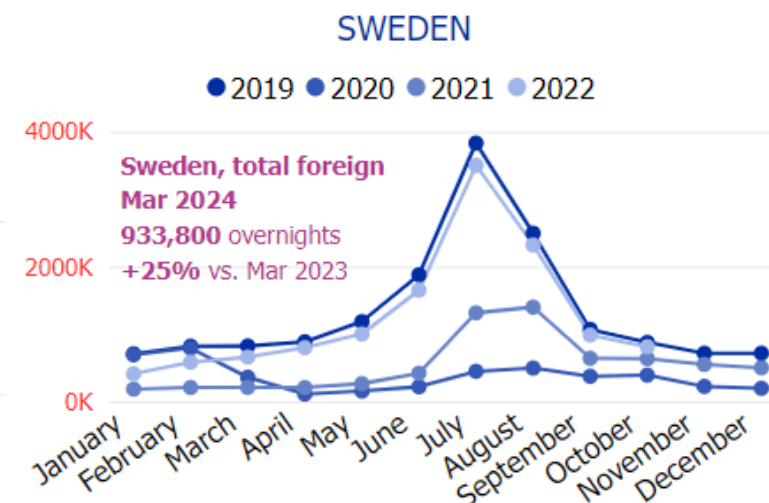
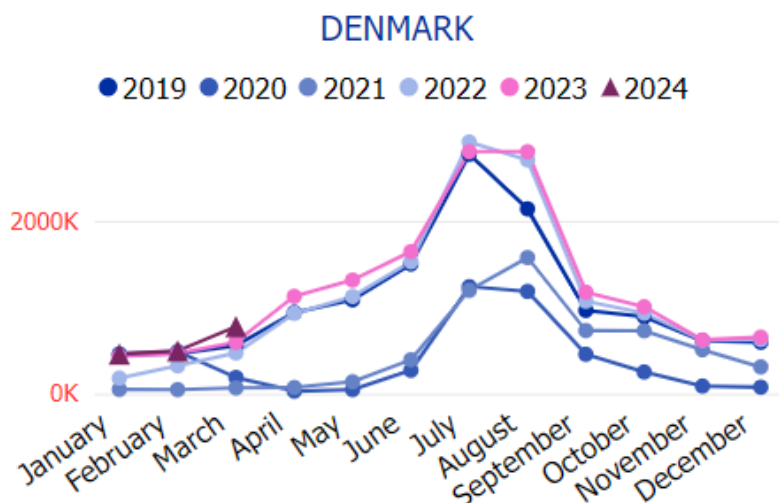
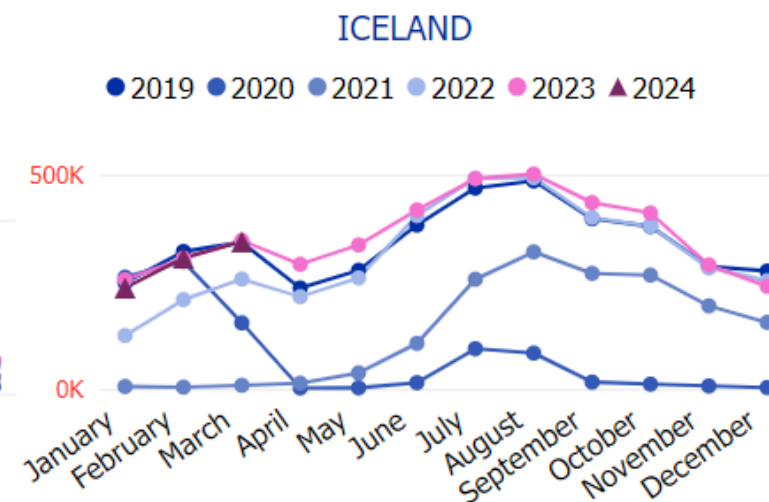
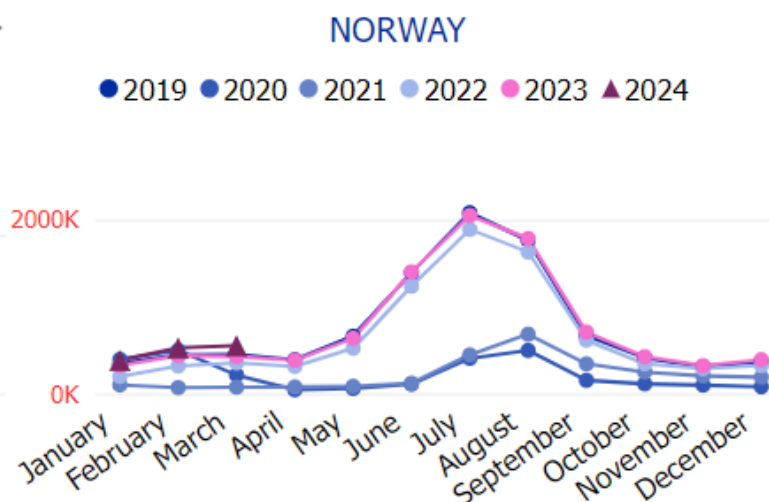
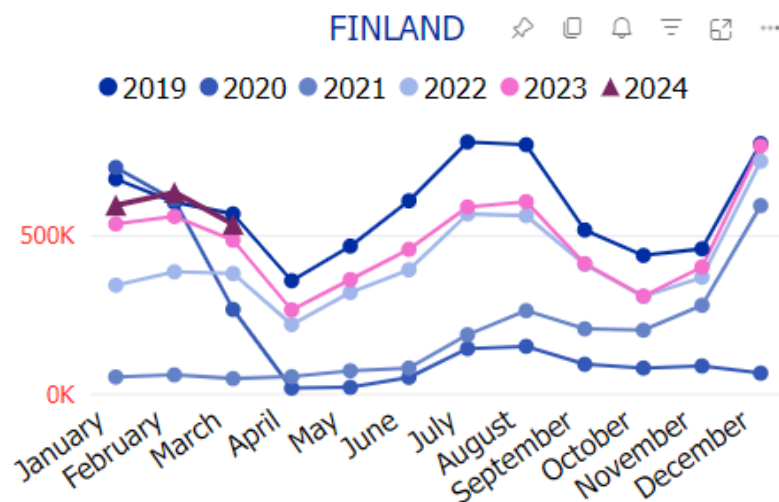
Year

2024

Month

March

VISIT
FINLAND



The latest available figures in report
format for Sweden are until Oct-2022.

Foreign overnights (millions) - Cumulative Jan-Mar

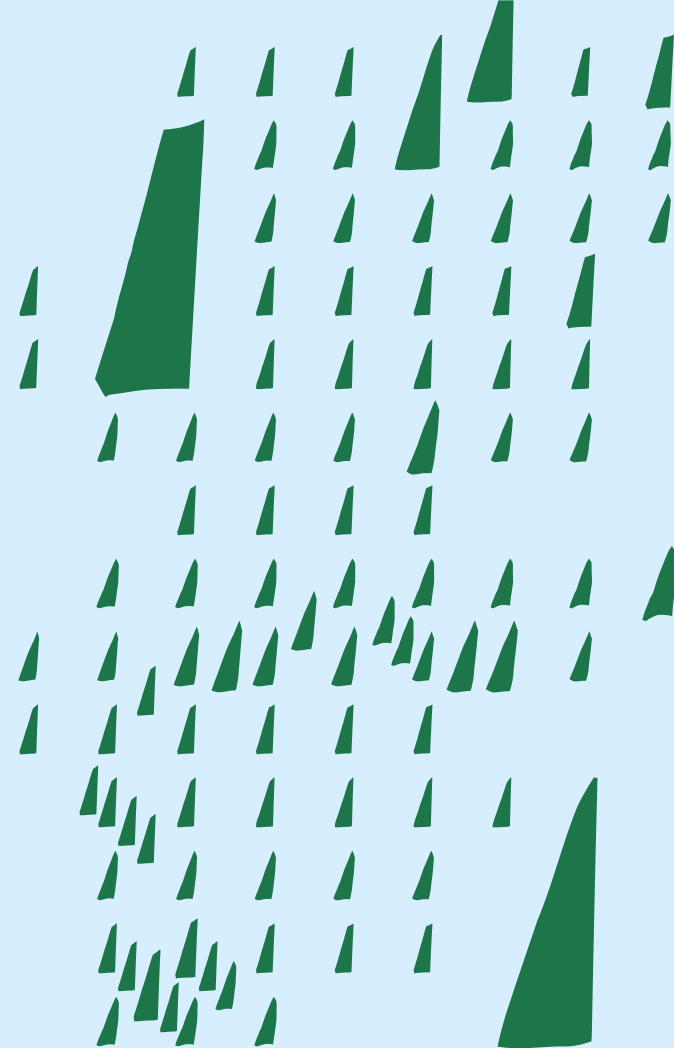
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Denmark	1 471 300	1 494 300	1 732 800	18 %	16 %
Norway	1 243 500	1 189 900	1 460 500	17 %	23 %
Iceland	910 600	905 600	884 000	-3 %	-2 %

Monthly overnight statistics for Iceland include hotels only.

Sources: Rudolf Data Base, Statistics Denmark, Statistics Finland, Statistics Iceland, Statistics Norway, Statistics Sweden

Flight bookings for Jun-Aug 2024

- Airline bookings for the **summer months** of June – August are **increasing compared to summer 2023**. *When comparing to summer 2019, the total int'l bookings are now at a slightly lower level. However, among the main source markets **USA, the Netherlands, Italy, Spain, and Austria** show **positive development** also compared to 2019.*
- International bookings to **Norway** continue to grow strongly also for the summer months when comparing to both to previous year as well as to 2019.



Int'l bookings for June – August 2024

170,300

+14% (-4%)

Bookings to Finland, foreign
for Jun-Aug 2024
change vs. 2023 & (2019)

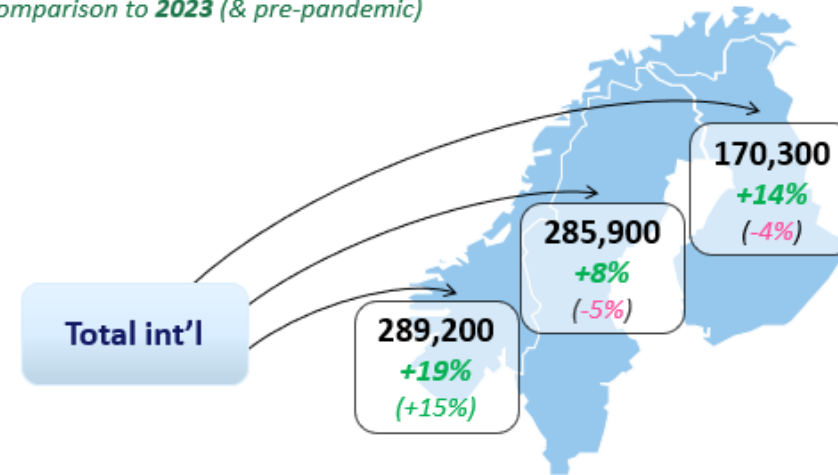
107,400

+8% (+4%)

Bookings to Finland,
selected markets* & USA
for Jun-Aug 2024
& change vs. 2023 & (2019)

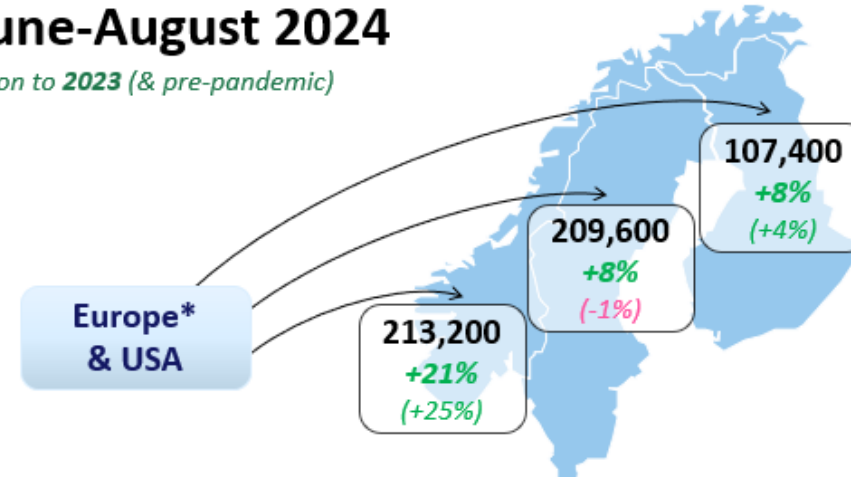
Total int'l flight bookings for June – August 2024

Comparison to 2023 (& pre-pandemic)



Flight bookings from Europe* & USA for June-August 2024

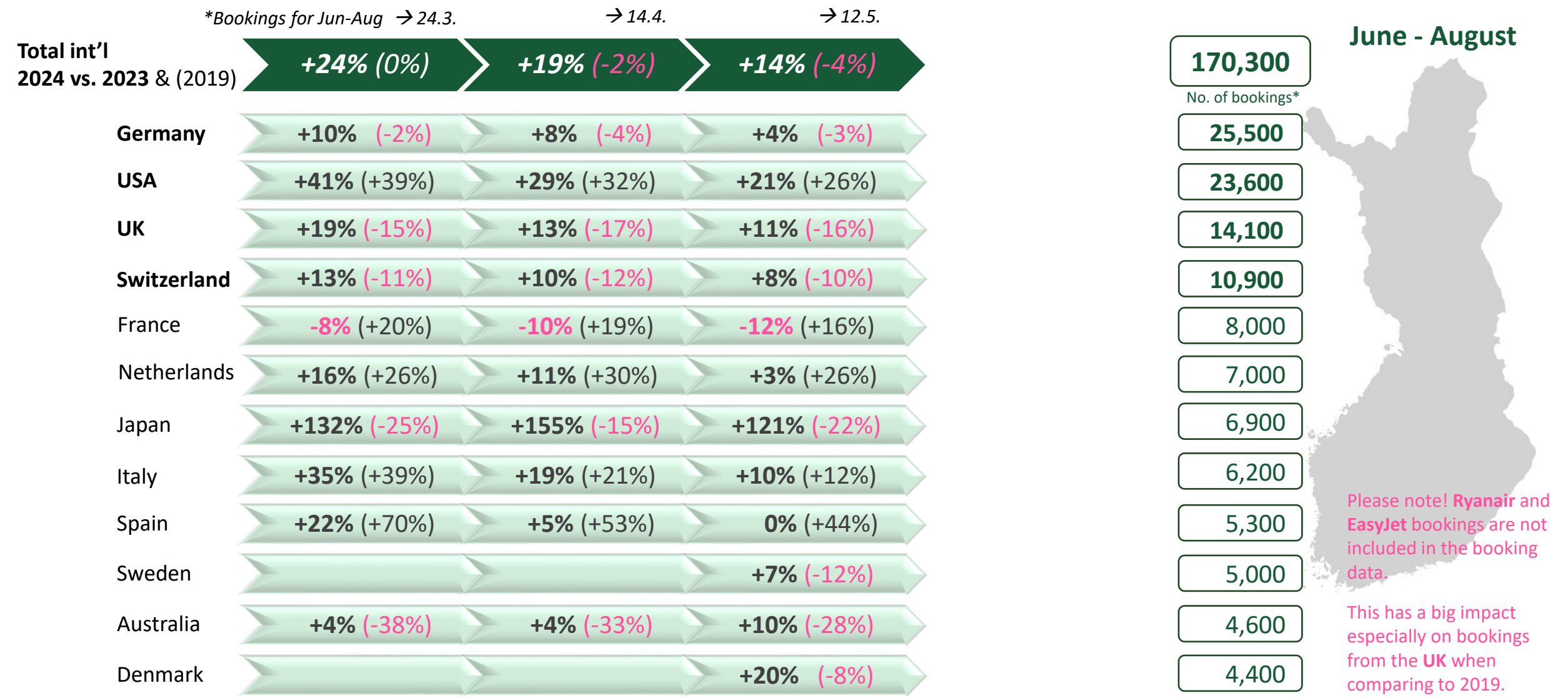
Comparison to 2023 (& pre-pandemic)



- *) Including:
- Germany
 - Switzerland
 - Austria
 - Netherlands
 - Belgium
 - UK
 - France
 - Spain
 - Italy

Follow up on flight bookings* to Finland from top12 source markets for June - August 2024

compared to **summer 2023** & (summer pre-pandemic)



Flight bookings* to FI, SE, NO for Jun-Aug 2024 compared to 2023 & pre-pandemic

Bookings to <u>FINLAND</u> from	No. of bookings by 12.5.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	170,300	+14%	-4%
Germany	21,500	+4%	-3%
USA	23,600	+21%	+26%
UK	14,100	+11%	-16%
Switzerland	10,900	+8%	-10%
France	8,000	-12%	+16%
Netherlands	7,000	+3%	+26%
Japan	6,900	121%	-22%
Italy	6,200	+10%	+12%
Spain	5,300	0%	+44%
Austria	3,700	+15%	+7%
South Korea	3,400	+28%	-31%
Belgium	3,100	+15%	-13%
India	1,800	-3%	-13%
Hong Kong	1,500	+38%	-62%
China	1,300	+57%	-77%
UAE	300	+7%	-29%

Bookings to <u>SWEDEN</u> from	No. of bookings by 12.5.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	285,900	+8%	-5%
USA	63,400	+12%	-3%
Germany	45,400	+16%	+1%
UK	27,100	+8%	+17%
Switzerland	20,100	+3%	-15%
France	13,900	-10%	-5%
Netherlands	11,800	+16%	-1%
Austria	10,000	0%	-11%
Spain	6,400	+2%	+61%
Belgium	6,300	-18%	-26%
Italy	5,200	+8%	+12%
India	3,100	-2%	+6%
China	2,900	+87%	-51%
Japan	2,500	+57%	-23%
South Korea	1,600	+15%	-35%
UAE	1,200	-21%	-26%
Hong Kong	1,100	+39%	-55%

Bookings to <u>NORWAY</u> from	No. of bookings by 12.5.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	289,200	+19%	+15%
USA	78,800	+31%	+33%
Germany	33,300	+18%	+15%
France	20,400	+1%	+24%
UK	19,500	+15%	+19%
Switzerland	17,100	+15%	+15%
Netherlands	15,500	+17%	+5%
Italy	9,200	+55%	+56%
Spain	6,900	+23%	+103%
Belgium	6,900	+12%	+18%
Austria	5,700	+37%	+37%
South Korea	2,900	+29%	-16%
China	2,900	+146%	-50%
India	2,000	+11%	+22%
UAE	1,500	-6%	+12%
Japan	1,500	+52%	-42%
Hong Kong	1,000	+27%	-57%

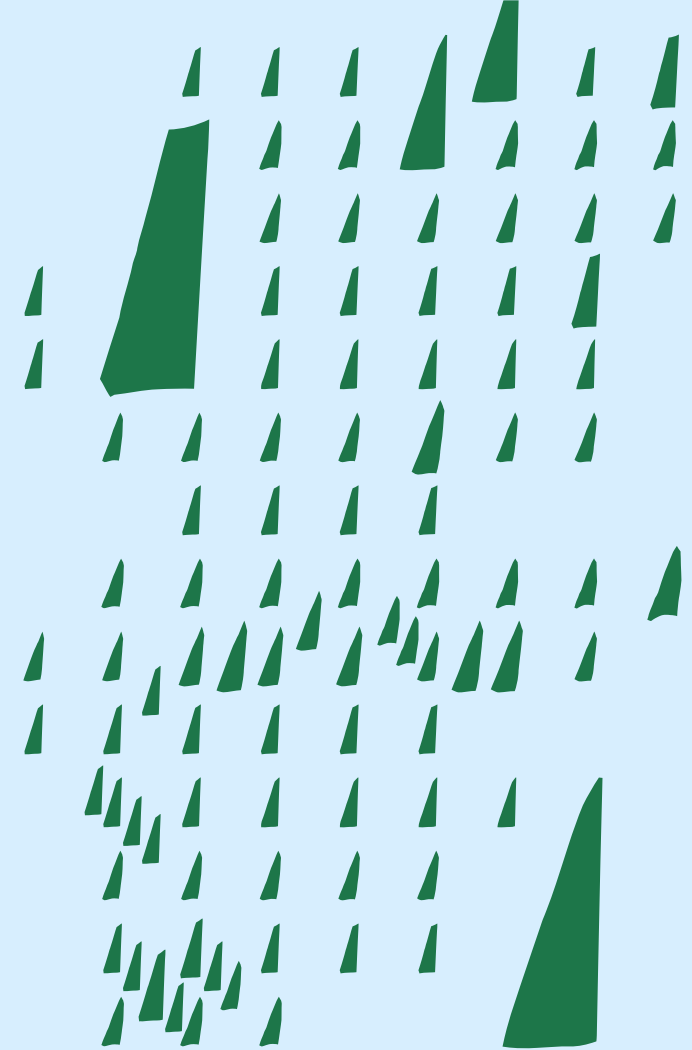
*) Flight bookings including at least 1 night stay in destination country.

Source: ForwardKeys Destination Gateway

Seat capacity on int'l flights

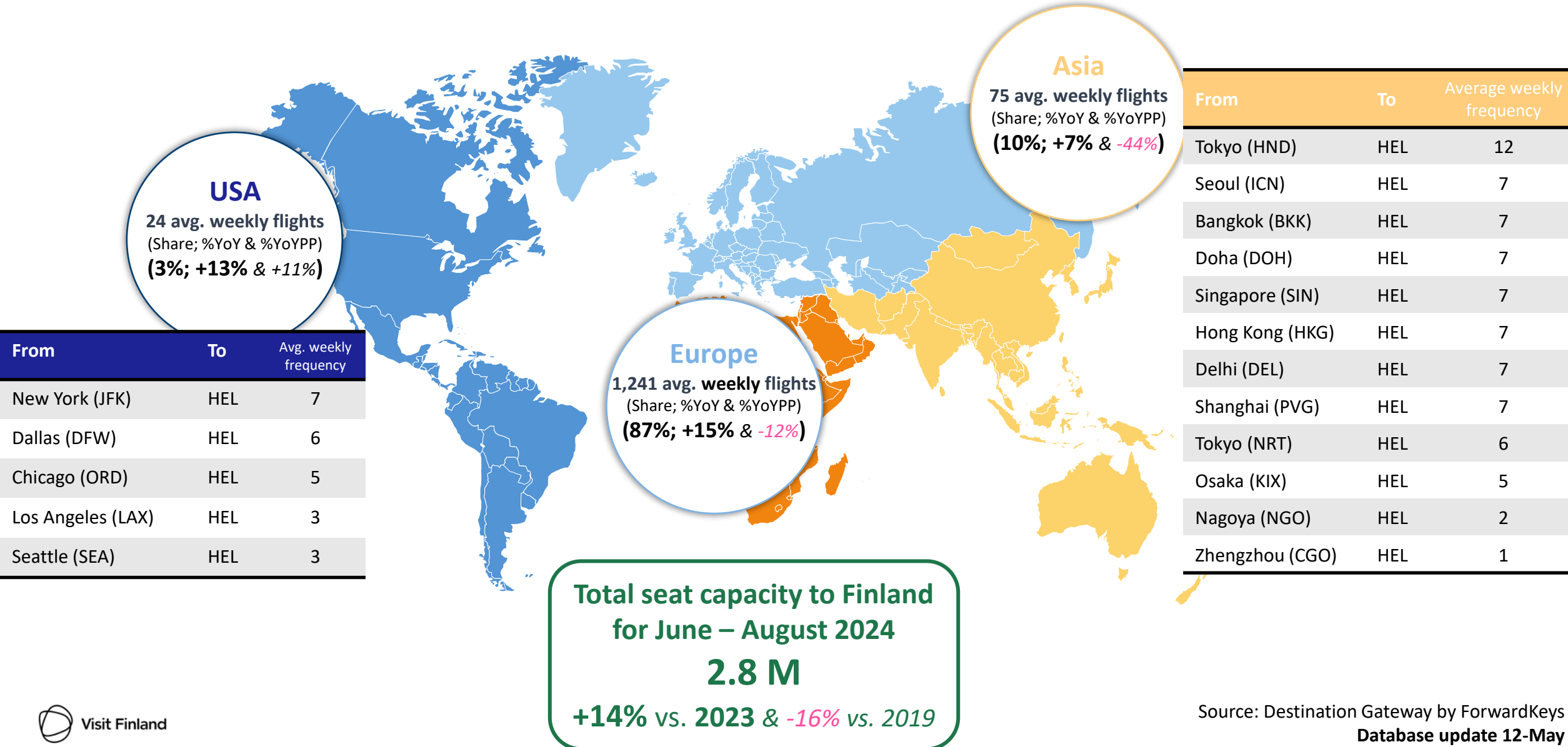
June – August 2024

- **Seat capacity** for the **summer months** of June – August is **14% above 2023 level**, *but still -16% compared to the pre-pandemic level.*
- Seat capacity from **Europe, USA** and **Asia** is **improving** compared to **previous year**.
 - Seat capacity from **nearly each source market in Europe** is developing positively compared to summer 2023.
 - From the Asian source markets, seat capacity is growing from **Japan, China,** and **Thailand.**
- Seat capacity from **USA** is above both summer 2023 and summer 2019 levels.



Direct int'l flights to Finland June – August 2024

and change in seat capacity compared to 2023 (& pre-pandemic)



EUROPE to Finland / Jun-Aug 2024

From (selected countries)	Share	Seat capacity compared to 2023	Seat capacity compared to 2019
Germany	12%	+14%	-16%
Sweden	10%	+14%	-21%
Spain	7%	+11%	-16%
Italy	7%	+10%	+32%
UK	6%	+6%	-31%
Greece	6%	+3%	+20%
Denmark	5%	+10%	-20%
Poland	4%	+72%	+10%
Norway	5%	+46%	-10%
France	5%	+8%	-4%
Latvia	4%	+11%	+27%
Netherlands	4%	-3%	+4%
Turkiye	3%	+8%	+18%
Estonia	3%	+45%	+31%
Switzerland	2%	+9%	0%
Croatia	2%	+9%	-12%

Top10 airlines operating
from Europe to Finland

+14.9% YOY
for selected airlines

