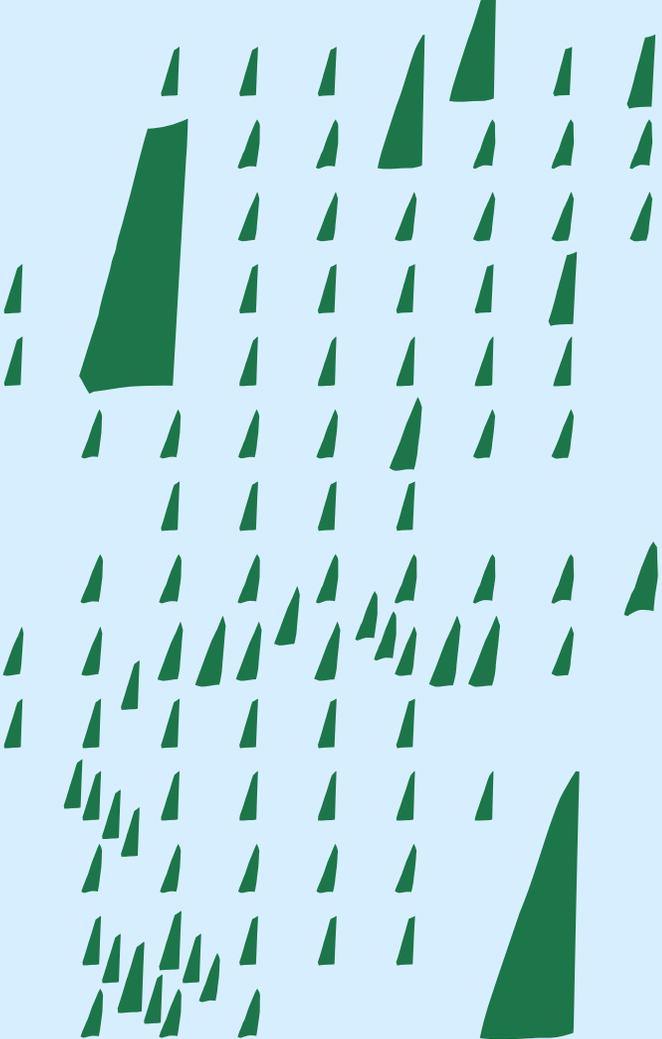


# Dutch overnights in Finland



# Overnights in Finland in 2022 & top source markets

Year 2022 vs. year 2019

## Overnights in 2022

**Total foreign 5.0 M**

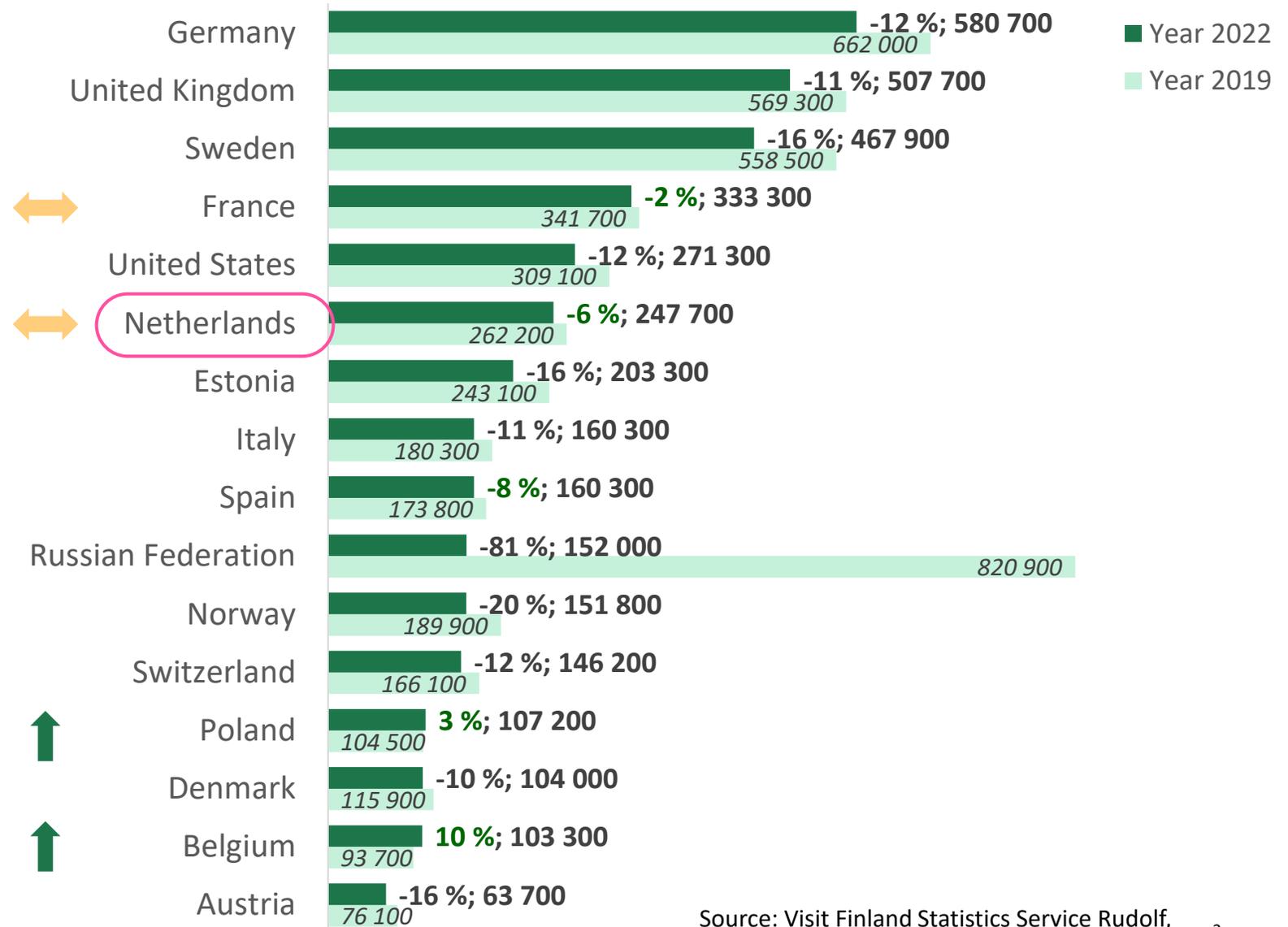
(-29% vs. 2019)

**Foreign excl. Russia 4.8 M**

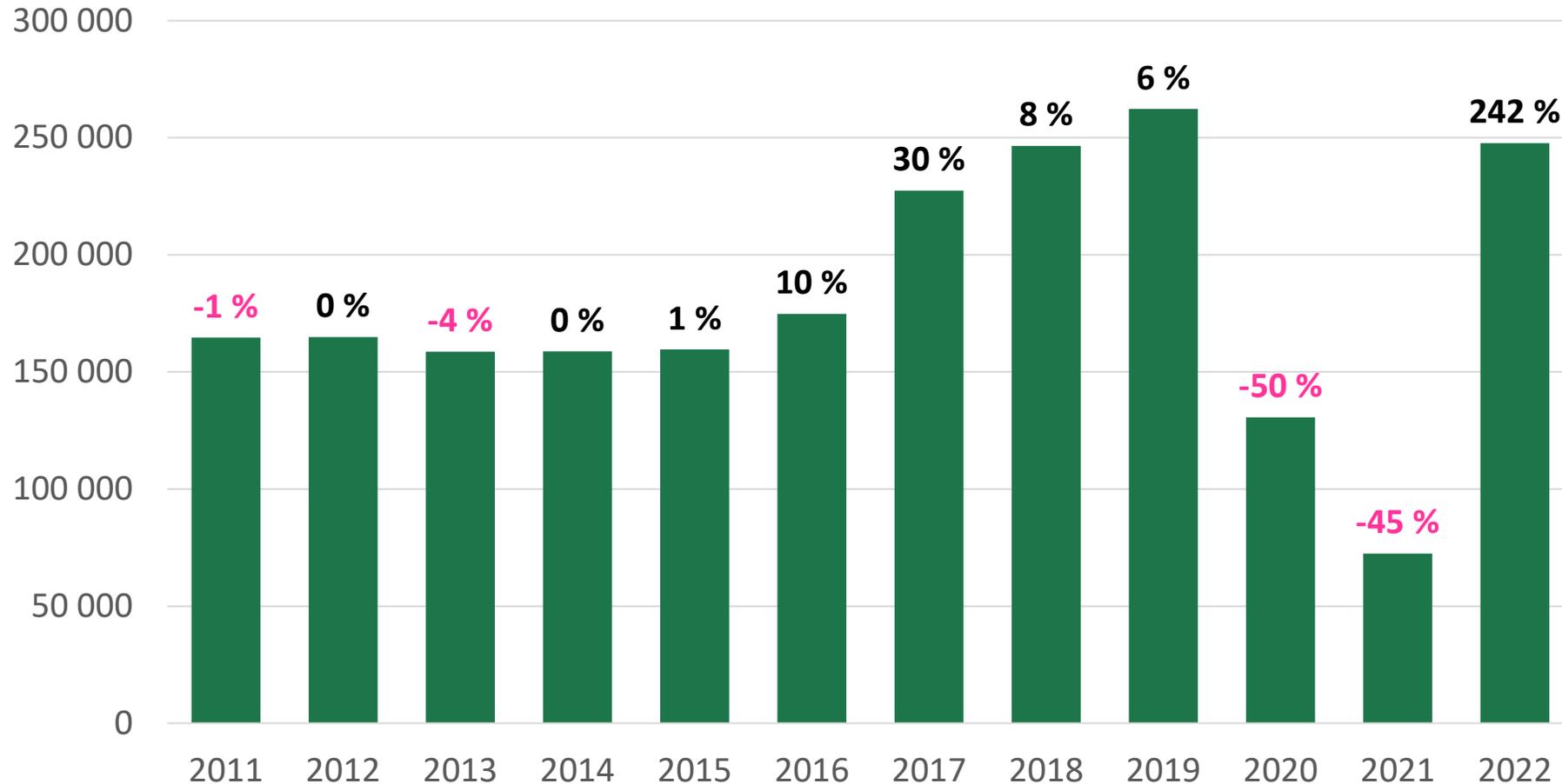
(-23% vs. 2019)

**EU+UK 3.4 M**

(-9% vs. 2019)



# Dutch overnights in Finland 2011-2022

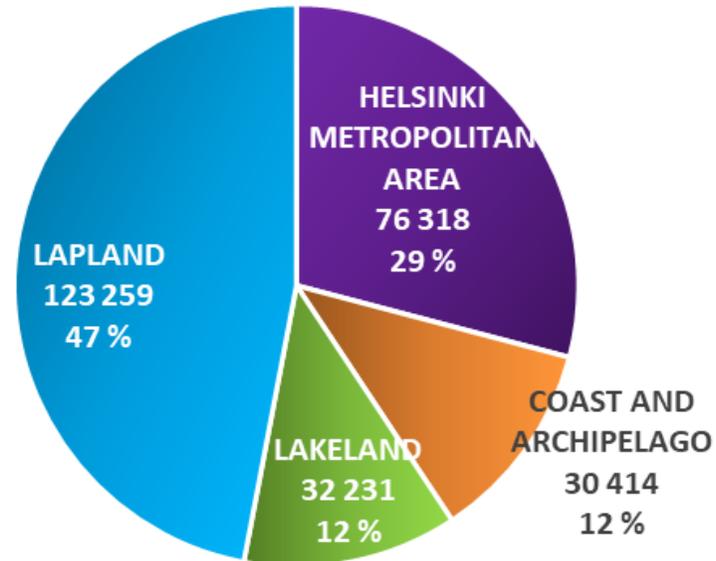


2022  
**247,700** nights  
#6 in market ranking  
YoY change +242%  
2022 vs. 2019 -6%

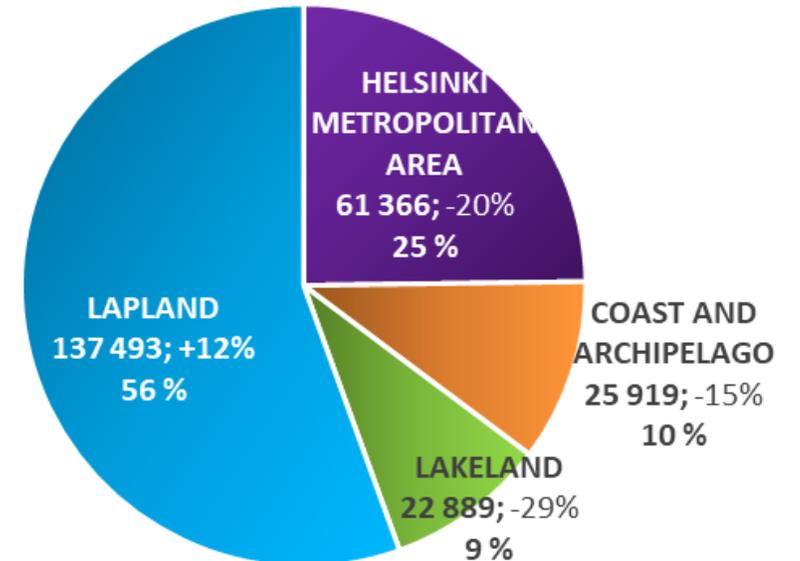
2019  
**262,200** nights  
#8 in market ranking

# Dutch overnights in Main Regions 2019 & 2022

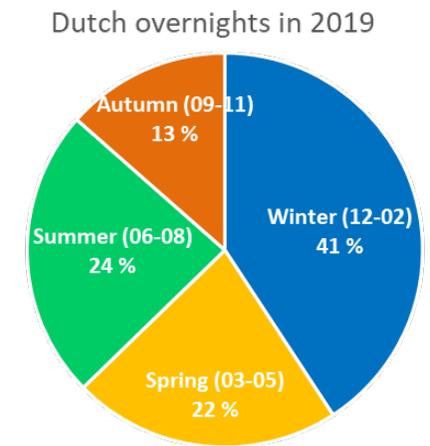
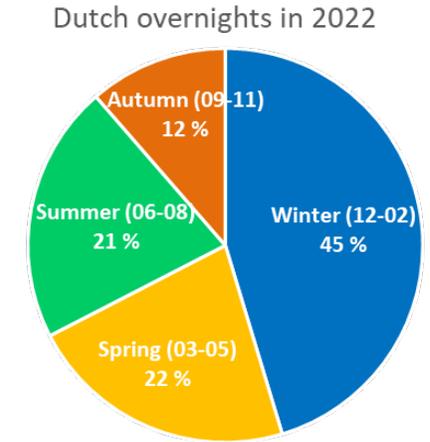
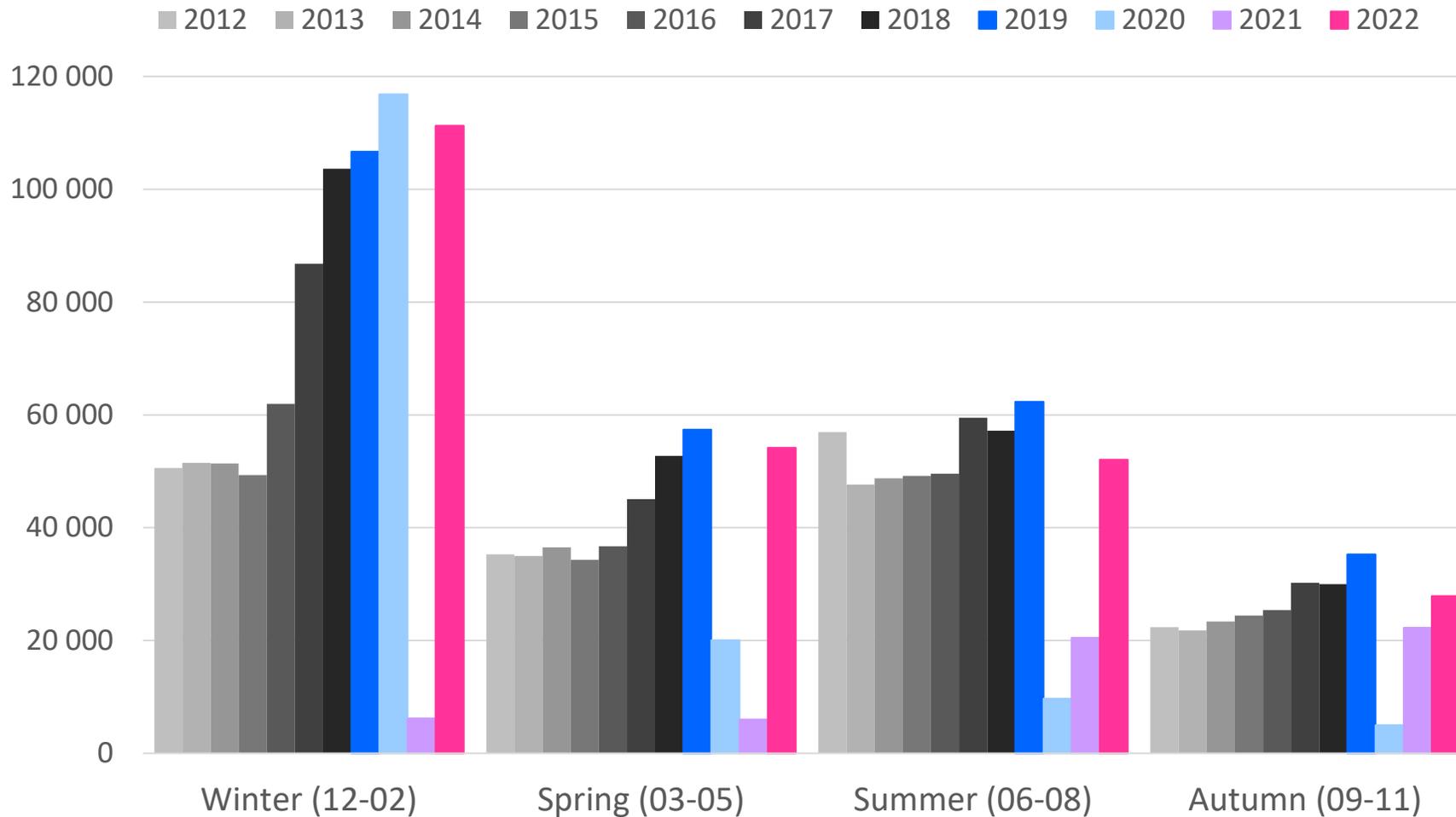
Dutch overnights in main marketing areas  
Year 2019



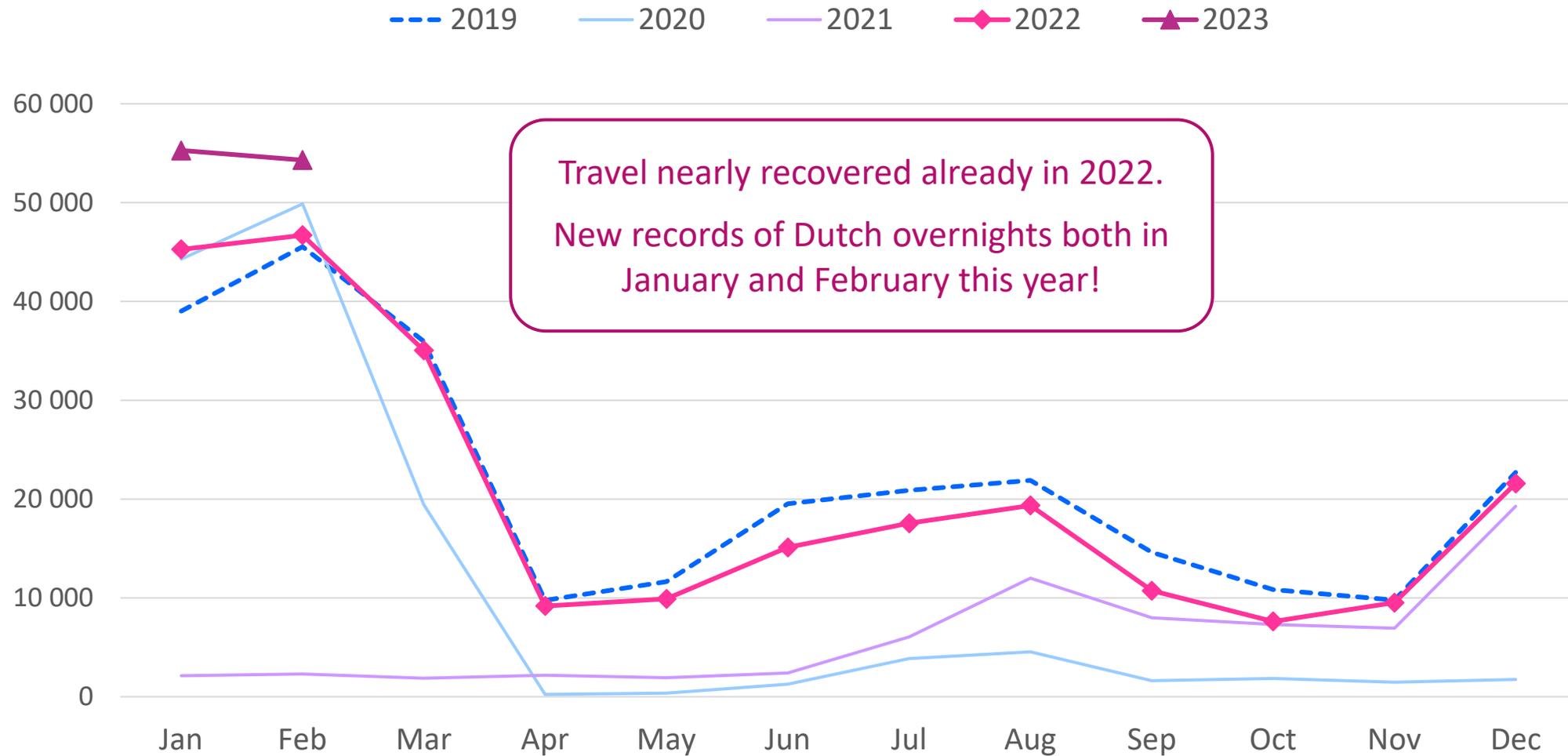
Dutch overnights in main marketing areas  
Year 2022 & change-% vs. 2019



# Netherlands – Seasonal Overnights in Finland 2012-2022



# Dutch monthly overnights in Finland 2019-2023

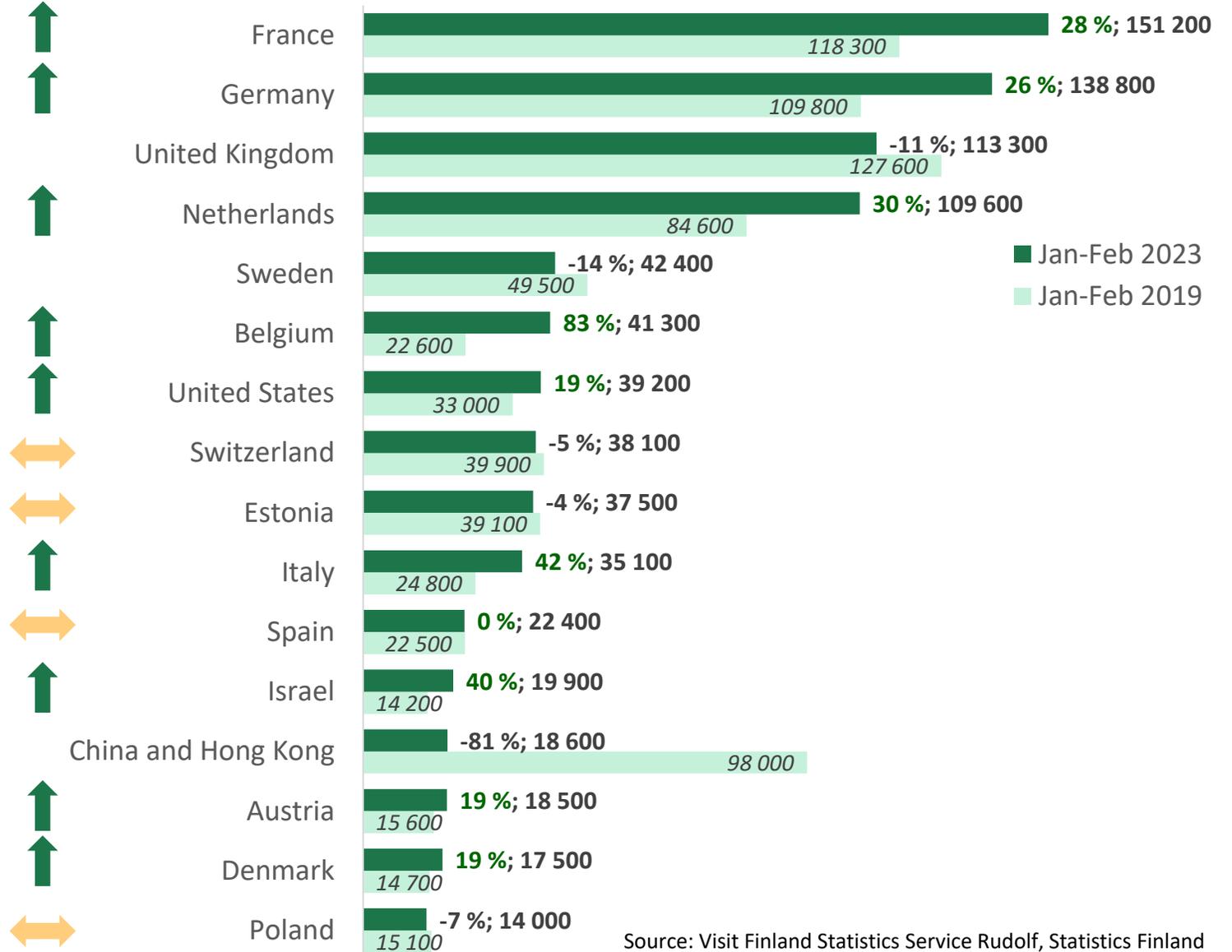


# Top16 countries 2023 – overnights in Finland

Jan-Feb 2023 vs. Jan-Feb 2019

## Top5 origin countries for Feb2023 overnights

	Overnights	Change to Feb2019
France	79 800	<b>+28%</b>
Germany	77 000	<b>+22%</b>
Netherlands	54 300	<b>+19%</b>
UK	53 100	-15%
Belgium	22 800	<b>+81%</b>



# Foreign overnights in high winter season 2022-2023

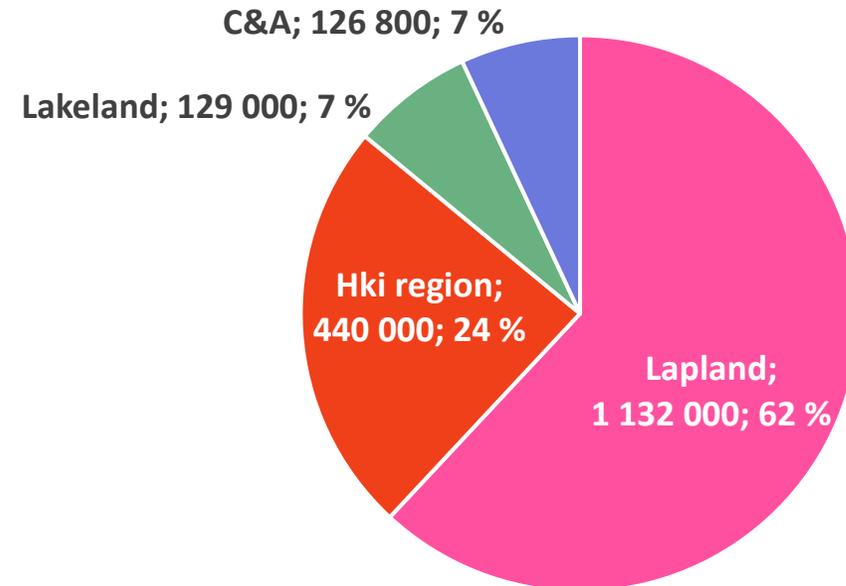
And change compared to pre-pandemic

## High winter season (12-02)

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

**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%)



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

## Helsinki region

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

Share of all foreign **24%**

Main dest: **Helsinki**

Top5 countries of origin		
Germany	38,100	-5%
USA	35,900	+12%
UK	33,700	-23%
Sweden	30,800	-15%
France	19,200	+8%

## Lakeland

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

Share of all foreign **7%**

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

Top5 countries of origin		
Estonia	22,200	+4%
Germany	14,000	-16%
Netherlands	6,600	-22%
Sweden	6,400	-41%
UK	5,200	-29%

## Coast & archipelago

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

Share of all foreign **7%**

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

Top5 countries of origin		
Sweden	19,700	-10%
Germany	17,600	0%
Estonia	9,500	-18%
Netherlands	7,600	+19%
France	6,000	+14%

# New records for the Dutch visitors in Lapland region during high winter season 2022-2023

**Dec 2022 – Feb 2023**

**103,800** Dutch overnights  
in the Lapland region

**+35%** vs. winter 2019  
&  
**+18%** vs. winter 2020

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

<b>Kolari-Ylläs</b>	<b>18,100</b>
<b>Inari-Saariselkä</b>	<b>17,500</b>
<b>Kittilä-Levi</b>	<b>17,100</b>
Kuusamo	10,100
Salla	9,800
Rovaniemi	7,400

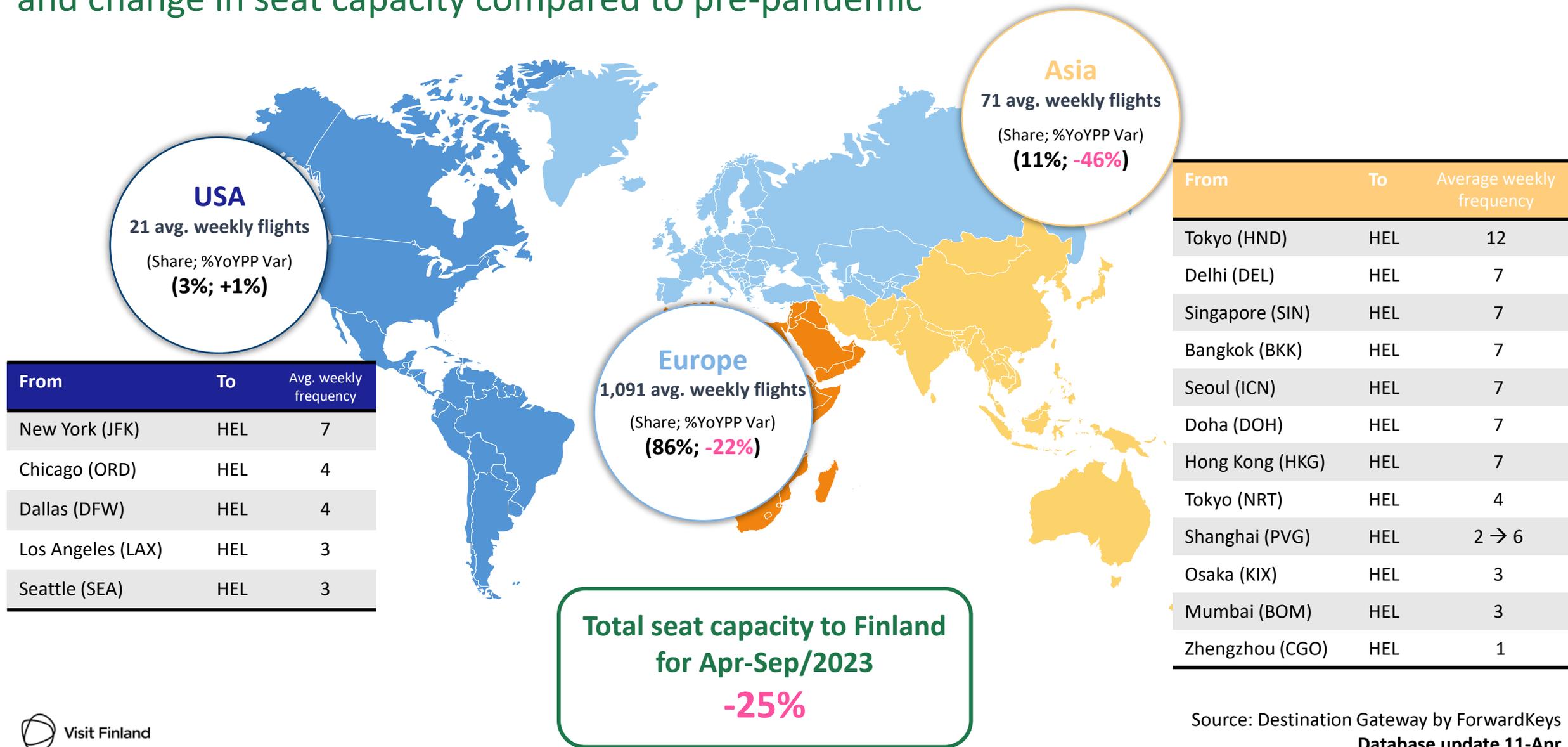


ForwardKeys

# **Seat capacity & Flight arrivals/bookings**

# Direct flights to Finland April – September 2023

and change in seat capacity compared to pre-pandemic

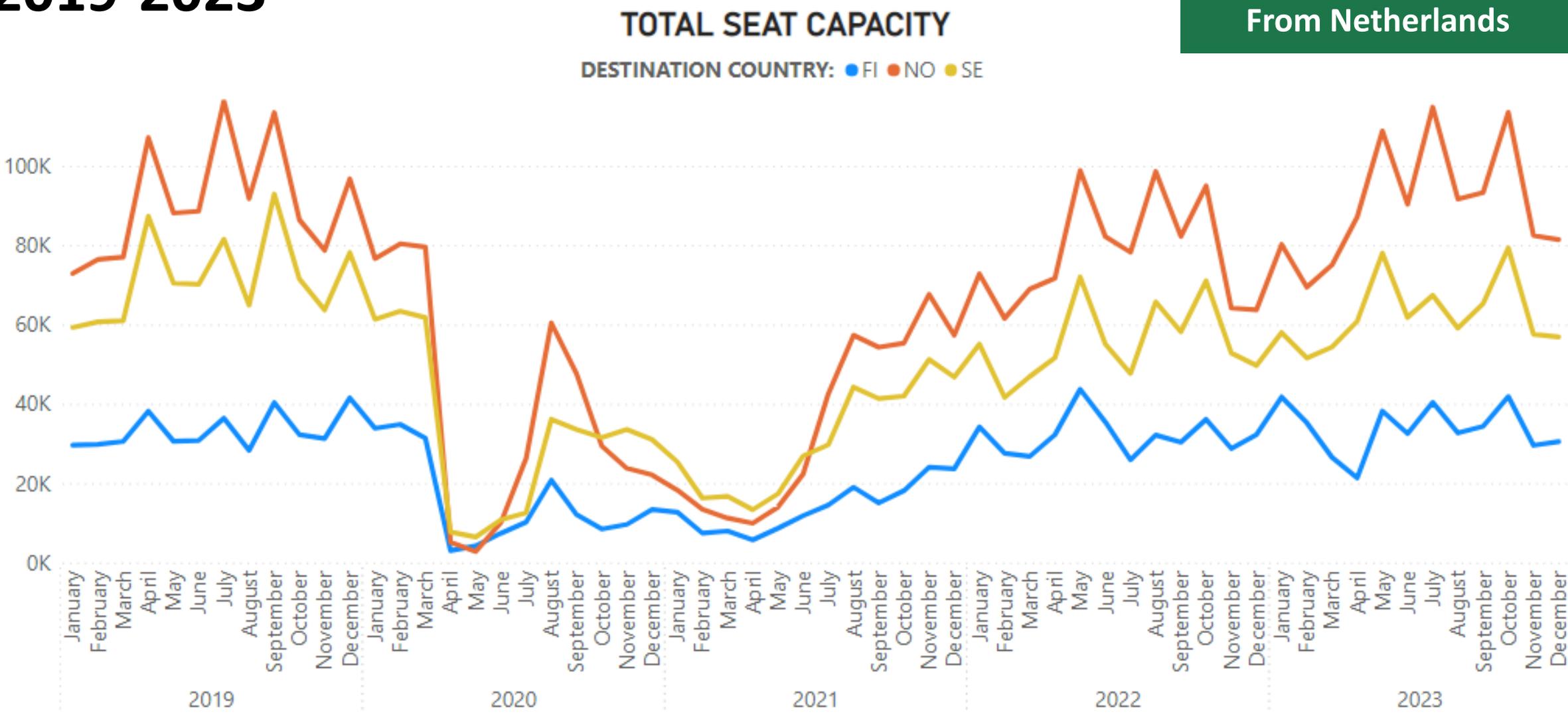


# Direct flights to FIN, SWE, NOR / April – September 2023

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
<b>Finland</b>	<b>153,700</b>	<b>+1%</b>	<b>538,000</b>	<b>-46%</b>	<b>4,219,200</b>	<b>-22%</b>	<b>4,911,500</b>	<b>-25%</b>
<b>Sweden</b>	<b>155,500</b>	<b>-38%</b>	<b>260,800</b>	<b>-41%</b>	<b>8,271,600</b>	<b>-14%</b>	<b>8,764,000</b>	<b>-15%</b>
<b>Norway</b>	<b>107,900</b>	<b>-25%</b>	<b>123,300</b>	<b>-40%</b>	<b>7,529,200</b>	<b>-6%</b>	<b>7,760,500</b>	<b>-8%</b>

# Monthly seat capacity from Netherlands to FIN, SWE, NOR 2019-2023



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

Comparison to pre-pandemic

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

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

Flight origins

1 airports **+2.3%** YOYPP for selected locations

Seat capacity from Netherlands to Finland will be **2% above** the pre-pandemic during spring-summer 2023



**+2.3%** YOYPP for selected airlines



Air Baltic operating three times a week late May onwards from Amsterdam to Tampere

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

Comparison to pre-pandemic

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

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

Flight origins

1 airports **-12.4%** YOYPP for selected locations

Seat capacity from Netherlands to Sweden will be **12% below** the pre-pandemic during spring-summer 2023



**-12.4%** YOYPP for selected airlines



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

Comparison to pre-pandemic

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

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

Flight origins

1 airports **+0.8%** YOYPP for selected locations

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

Amsterdam (AMS) **+0.8%**

**+0.8%** YOYPP for selected airlines

	Share ↑↓	YOYPP ↑↓
Klm Royal Dutch Ai...		<b>+0.3%</b>
Sas		<b>+9.2%</b>
Norwegian Air Shut...		<b>-0.9%</b>
Corendon Dutch Ai...		<b>Discontinued</b>

# 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.

**Total int'l**  
summer 2023 vs. 2019



**June-August**

**101,000**

No. of flight tickets\*

**15,600**

**10,200**

**8,900**

**6,900**

**6,100**

**4,600**

**4,500**

**3,300**

**3,200**

**2,900**

**1,500**

**Germany**



**USA**



**UK**



**Switzerland**



**France**



**Hong Kong**



**Netherlands**



**Italy**



**Spain**



**Sweden**



**Japan**



Please note! Ryanair, EasyJet 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 the Netherlands

## Comparison to pre-pandemic

- Travel from the Netherlands seems to be recovering clearly faster to Finland than to Norway and Sweden.
- Bookings to Finland for the coming summer clearly above the 2019 levels.

### Destination benchmark

YOYPP of tourist arrivals

Data updated 09-Apr

### Netherlands - Change in arrivals / bookings vs. pre-pandemic

#### Tourist arrivals to my competing destinations



Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet 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



## Netherlands - Bookings for Jun-Aug 2023

	June	July	August	Jun-Aug
<b>Finland</b>	1,800	2,300	900	<b>5,000</b>
<b>Sweden</b>	3,000	1,700	1,000	<b>5,700</b>
<b>Norway</b>	3,900	2,800	1,900	<b>8,600</b>
	June	July	August	Jun-Aug
<b>Finland</b>	<b>+19%</b>	<b>+42%</b>	<b>+16%</b>	<b>+28%</b>
<b>Sweden</b>	<b>-11%</b>	<b>-29%</b>	<b>-33%</b>	<b>-21%</b>
<b>Norway</b>	<b>-3%</b>	<b>-24%</b>	<b>-8%</b>	<b>-12%</b>

Including at least 1 night in destination.

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

