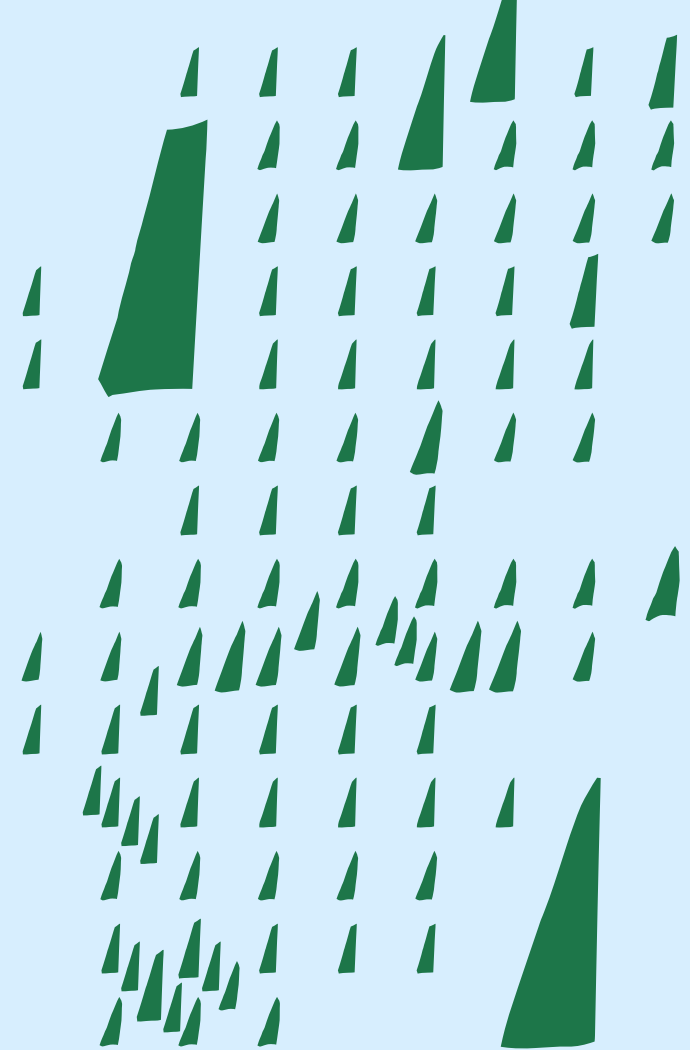


Visit Finland


Sweden – market insights










April 2023

Travel related internet searches 2022 vs. 2019



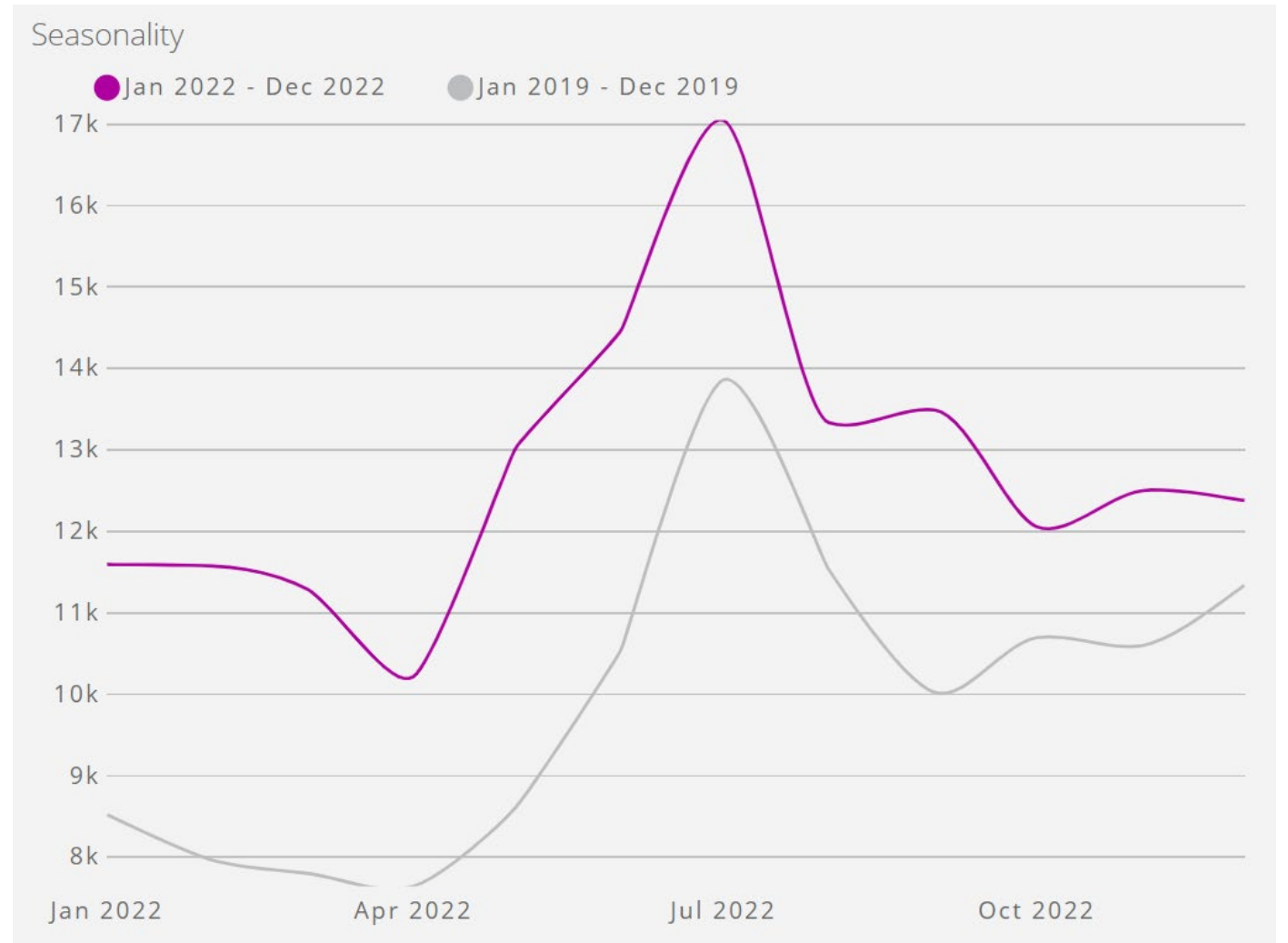
Top Target Markets 2022 vs. 2019

Target Market Distribution				
Rank	Flag	Country	2022 Searches	22/19 Growth
1		Germany	635,793	36.7%
2		Japan	592,326	7.9%
3		United States	590,094	53.8%
4		United Kingdom	382,169	29.2%
5		Italy	285,187	33.4%
6		France	283,549	20.9%
7		Spain	243,895	30.5%
8		Estonia	175,015	66.0%
9		Netherlands	166,802	38.1%
10		India	164,824	30.7%

Target Market Distribution				
Rank	Flag	Country	2022 Searches	22/19 Growth
11		Sweden	152,968	28.4%
12		Canada	146,342	58.3%
13		Switzerland	136,764	22.0%
14		Austria	99,079	24.1%
15		Australia	88,853	28.3%
16		Belgium	81,009	26.4%
17		China	74,768	-86.4%
18		South Korea	58,664	42.2%
19		Russia	0	-100.0%

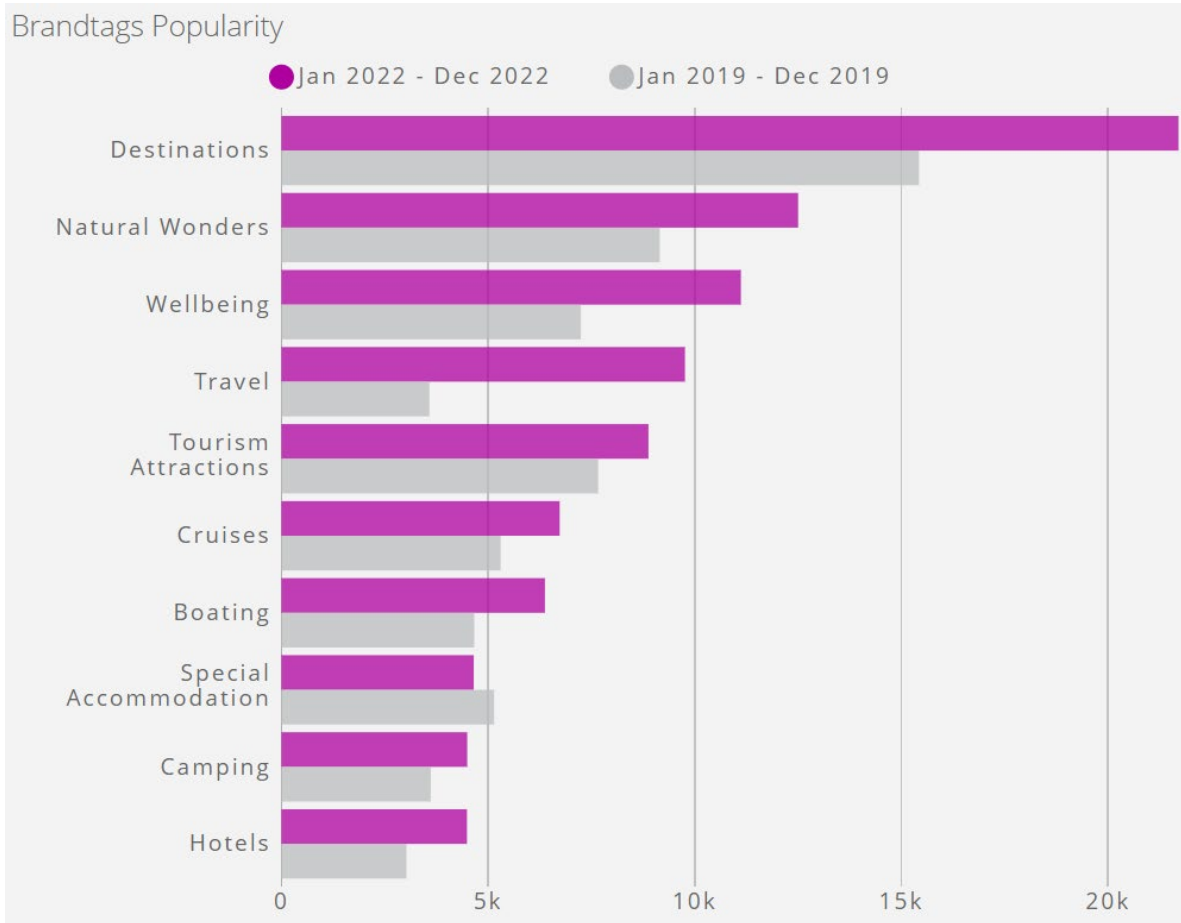
Sweden: Seasonality of Searches

2022 and 2019

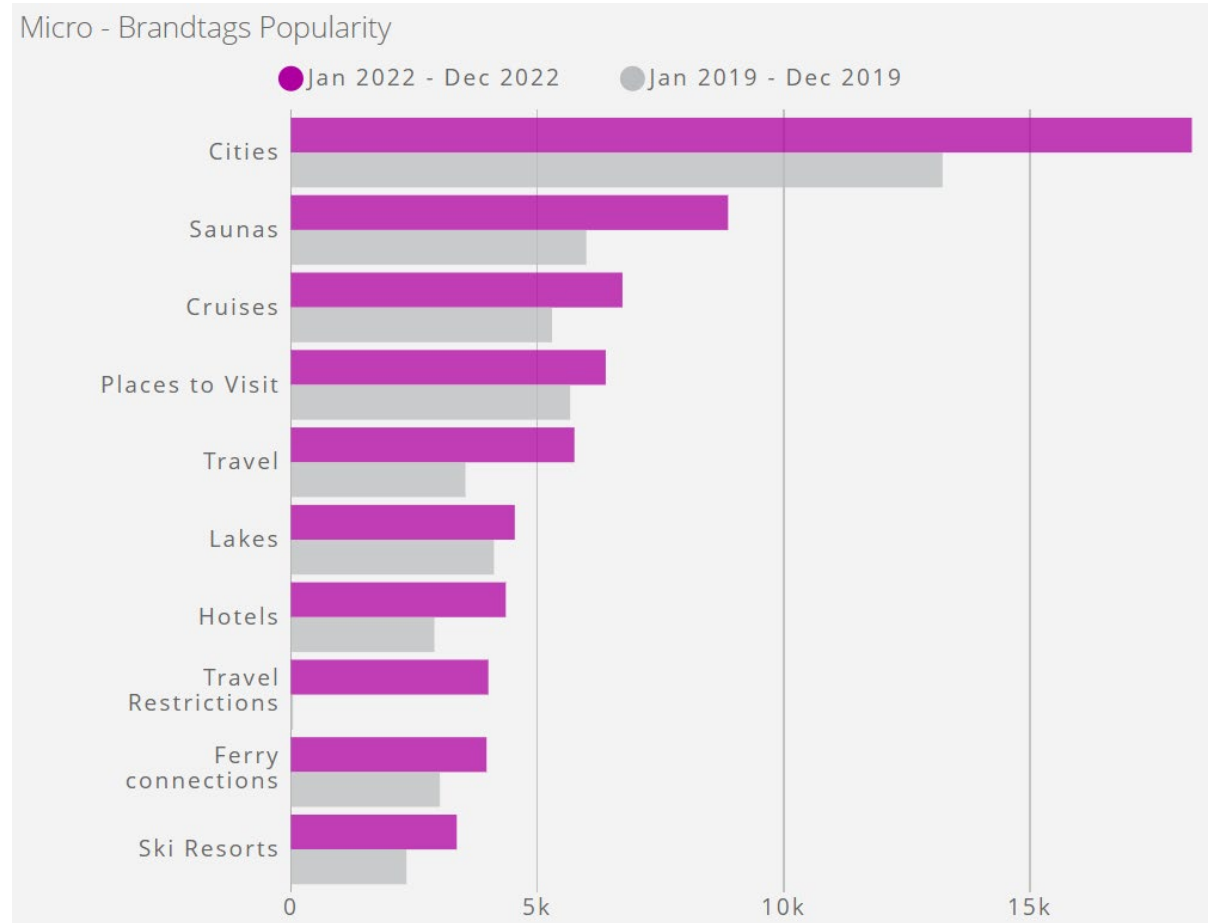


Sweden: Most searched topics and keywords 2022 vs. 2019

Most Popular Topics

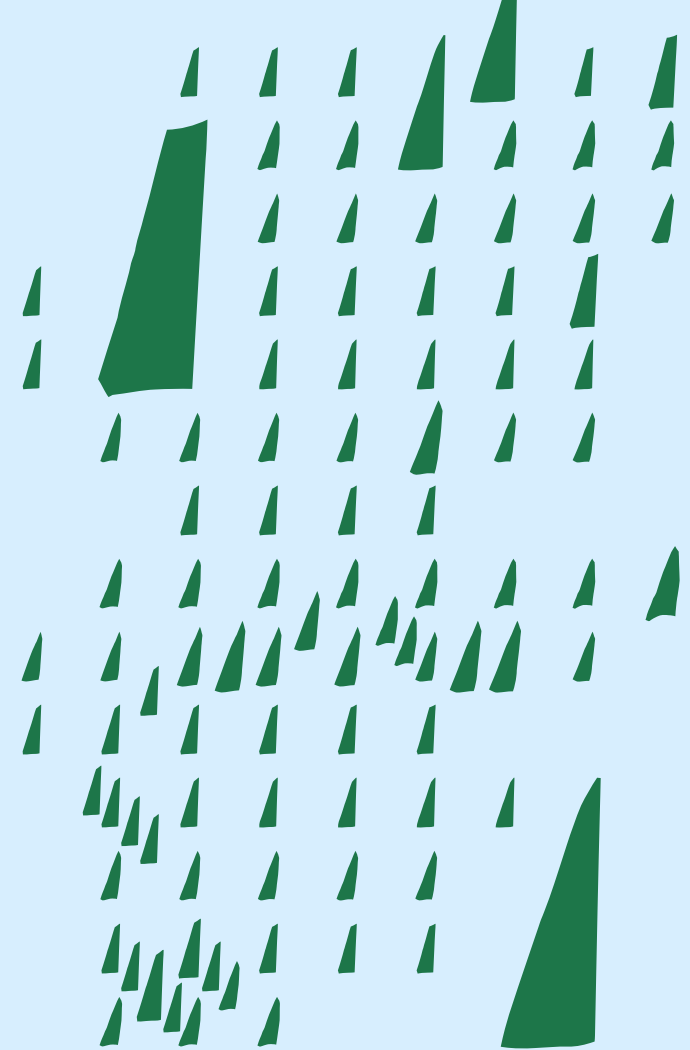


Most Popular Keywords



Overnights in Finland

Year 2022 & Jan-Feb 2023



Overnights in Finland in 2022 & top source markets

Year 2022 vs. year 2019

Overnights in 2022

Total foreign 5.0 M

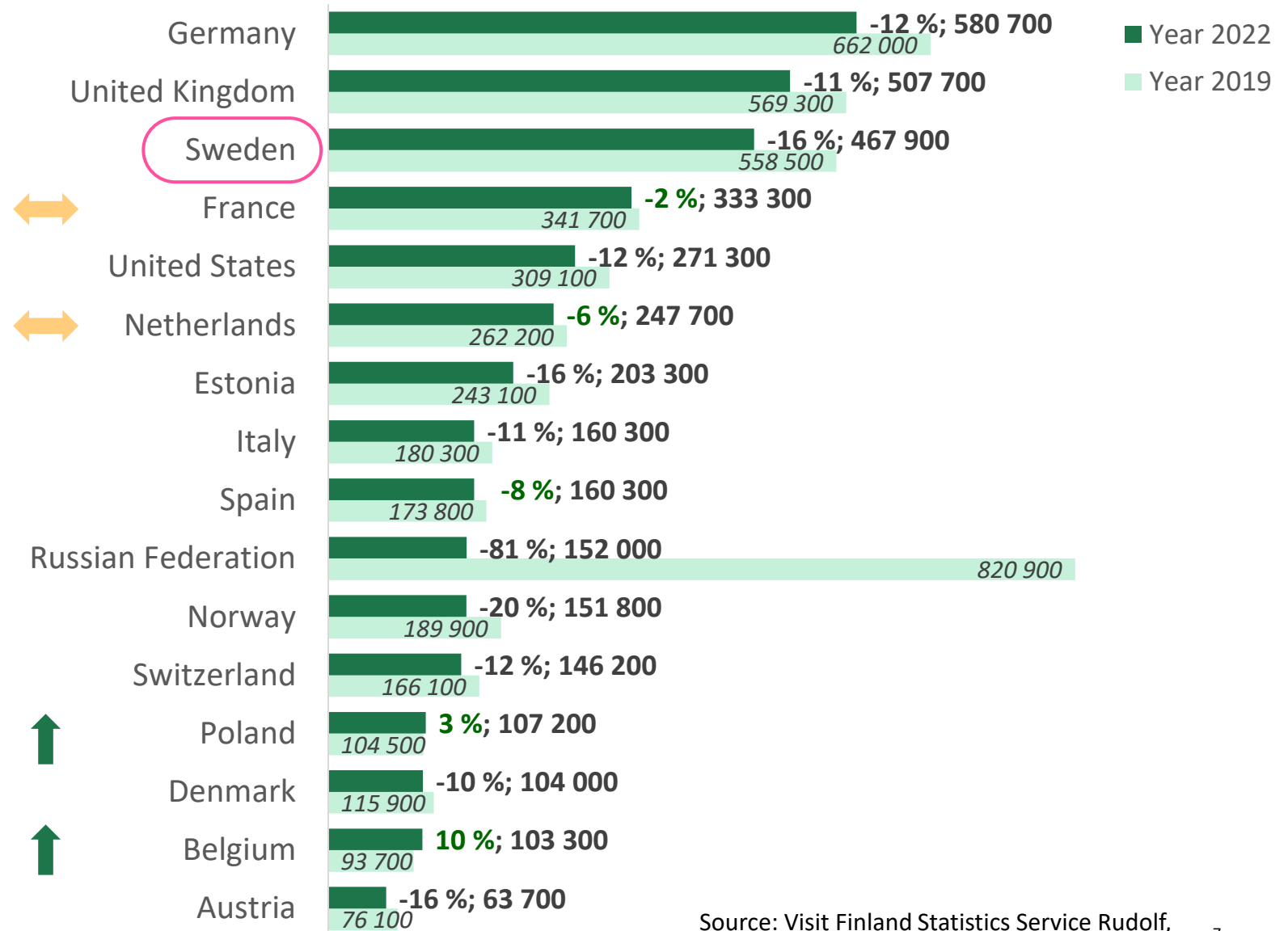
(-29% vs. 2019)

Foreign excl. Russia 4.8 M

(-23% vs. 2019)

EU+UK 3.4 M

(-9% vs. 2019)

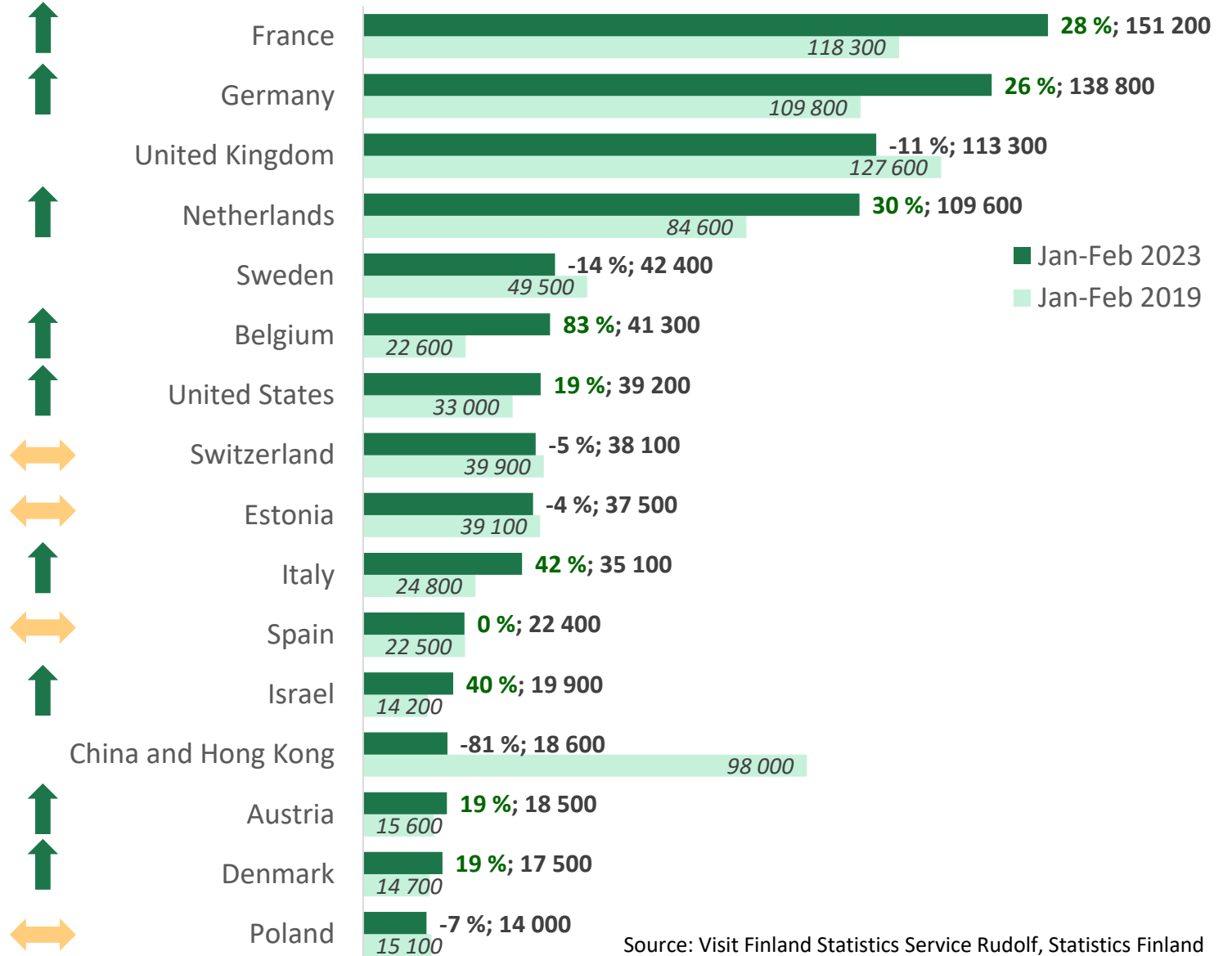


Top16 countries 2023 – overnights in Finland

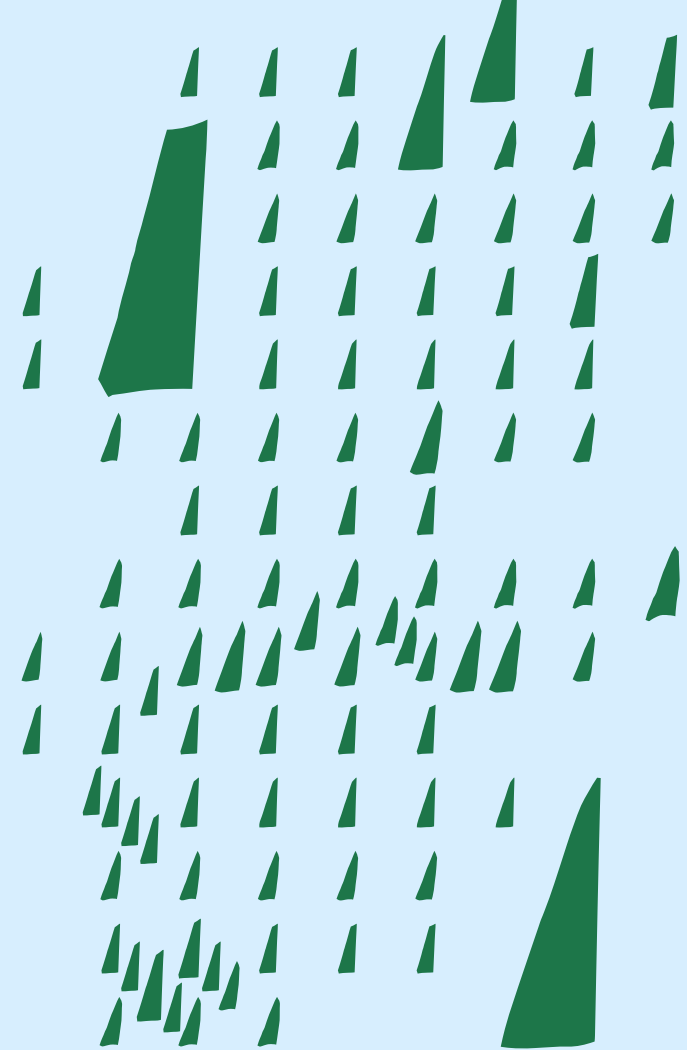
Jan-Feb 2023 vs. Jan-Feb 2019

Top5 origin countries for Feb2023 overnights

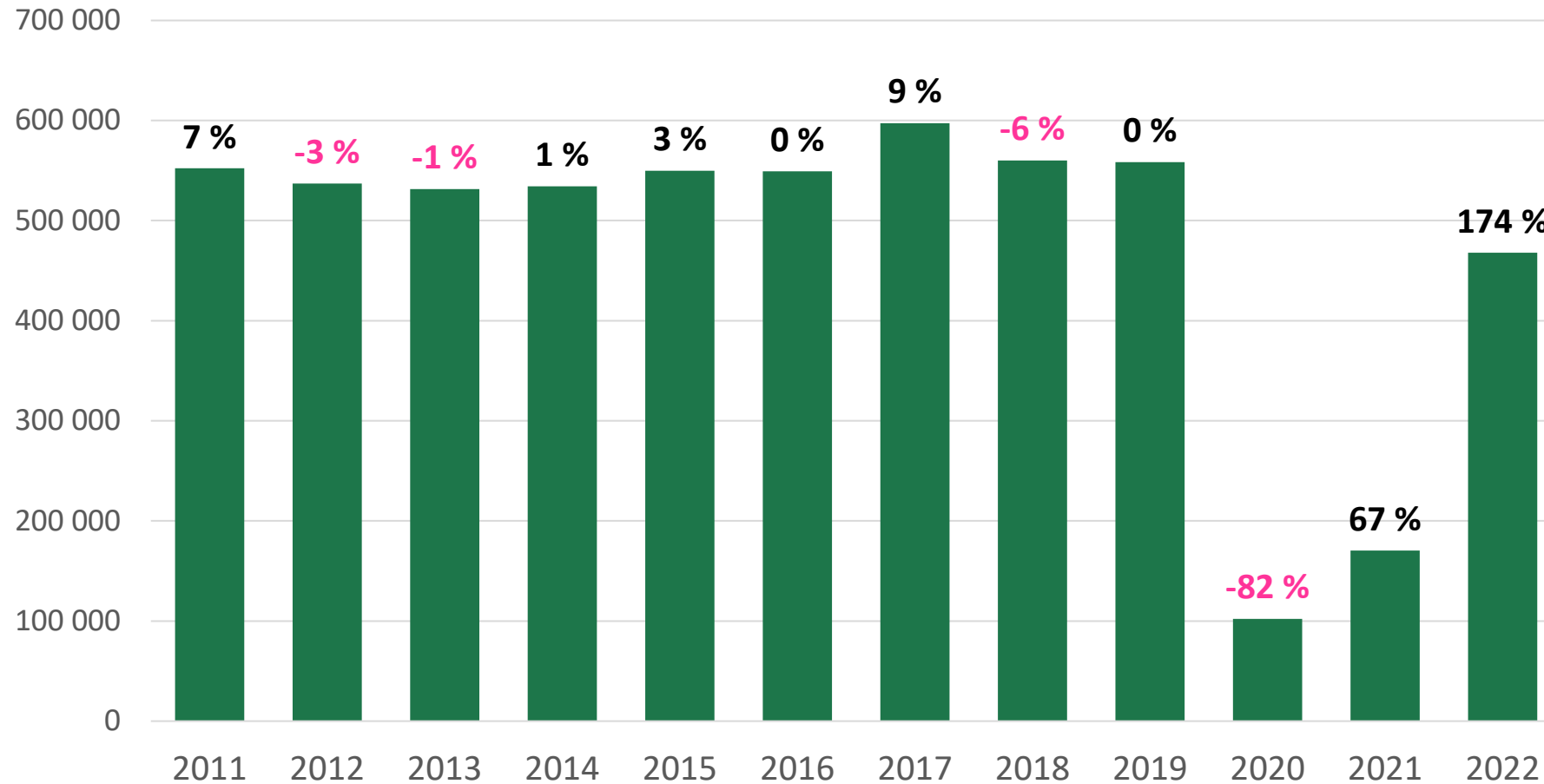
	Overnights	Change to Feb2019
France	79 800	+28%
Germany	77 000	+22%
Netherlands	54 300	+19%
UK	53 100	-15%
Belgium	22 800	+81%



Swedish overnights in Finland



Swedish overnights in Finland 2011-2022

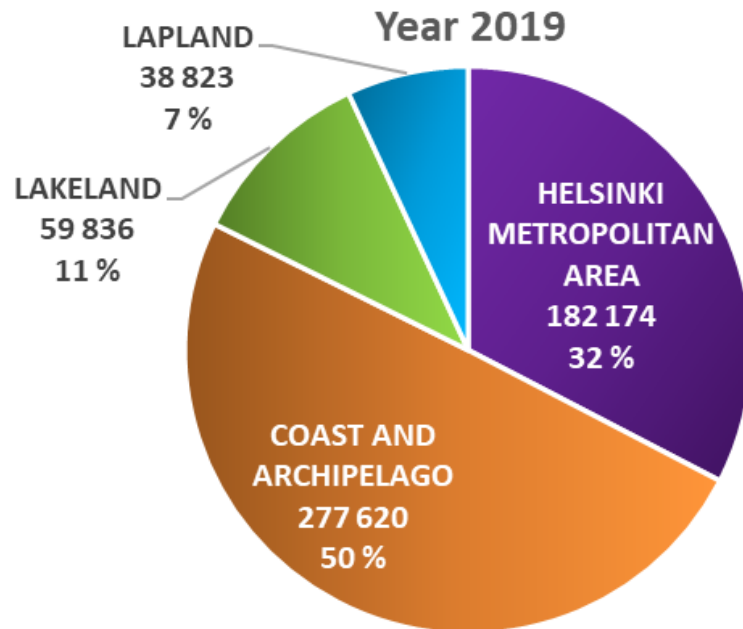


2022
467,900 nights
#3 in market ranking
YoY change +174%
2022 vs. 2019 -16%

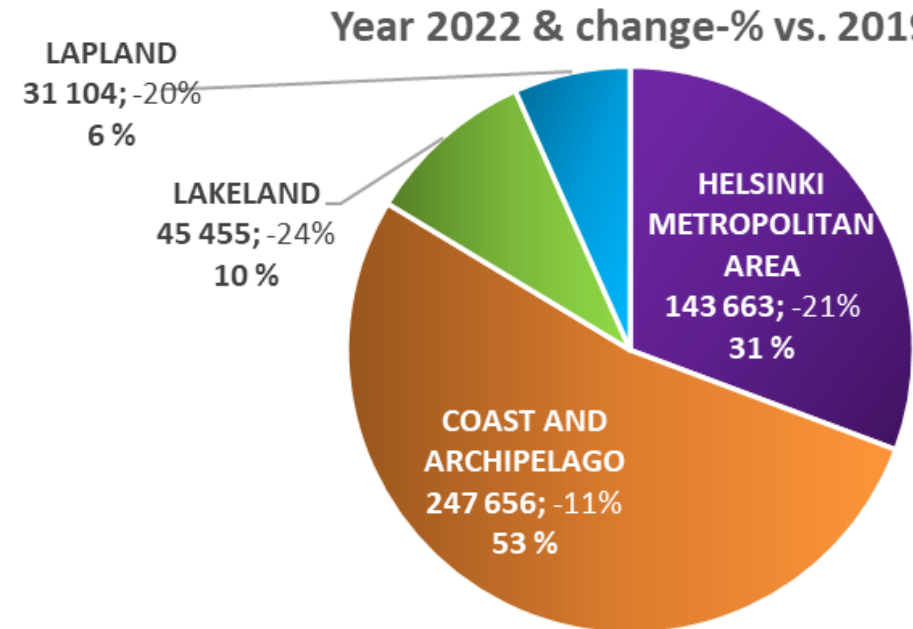
2019
558,500 nights
#4 in market ranking

Swedish overnights in Main Regions 2019 & 2022

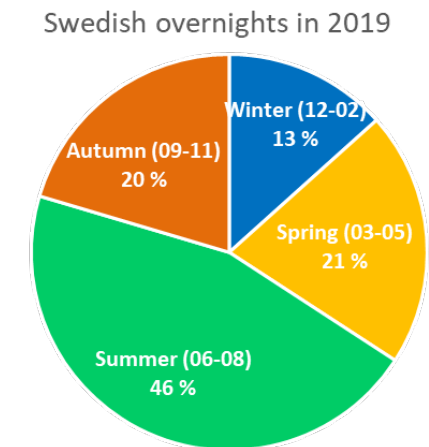
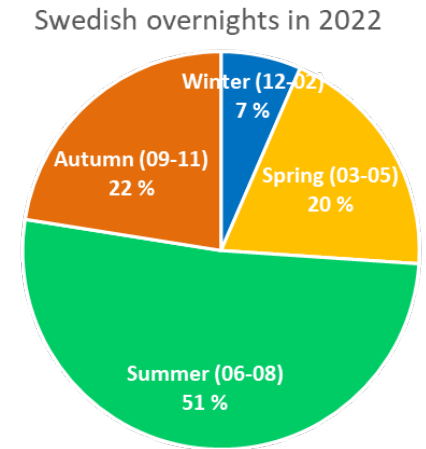
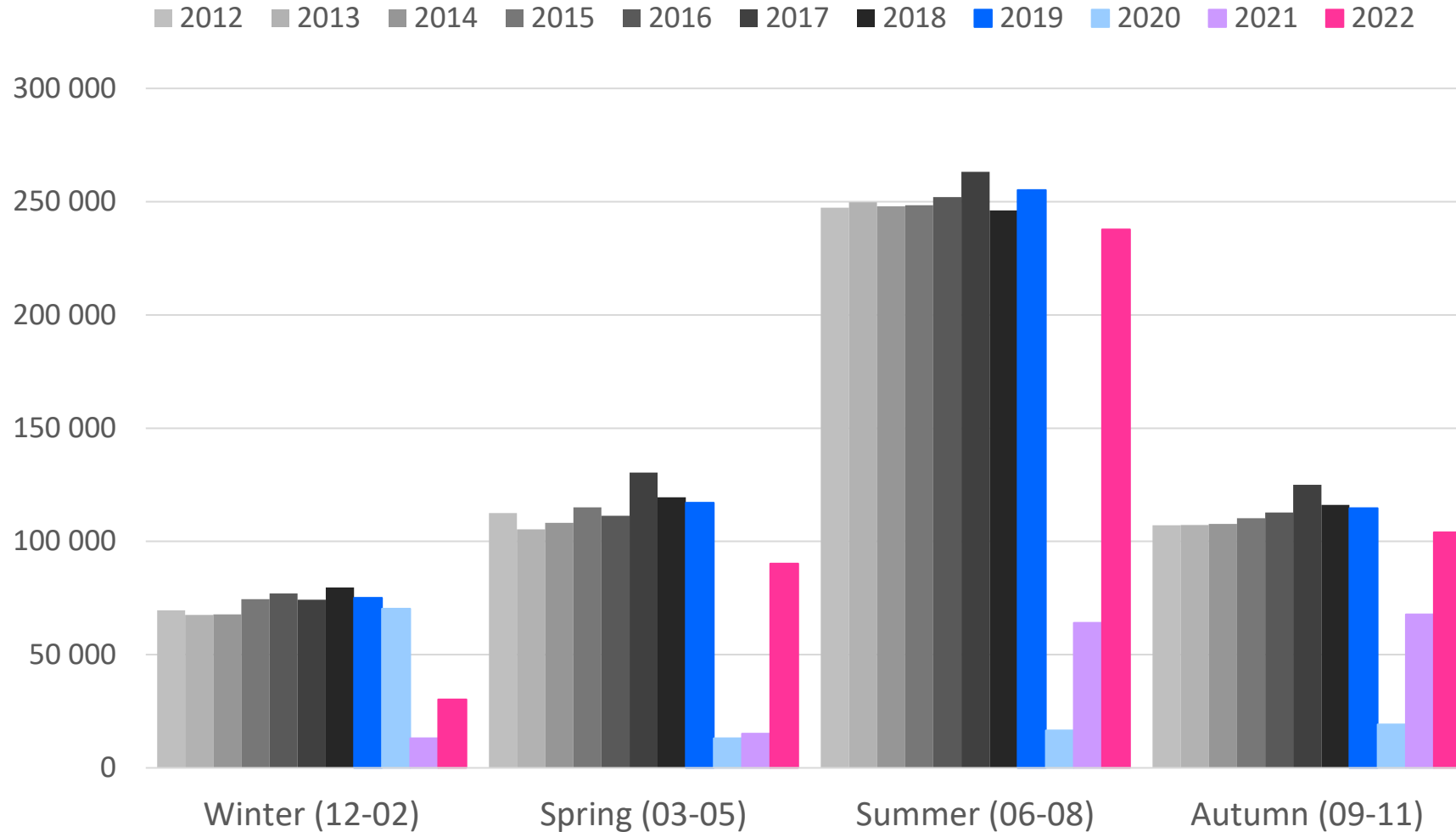
Swedish overnights in main marketing areas



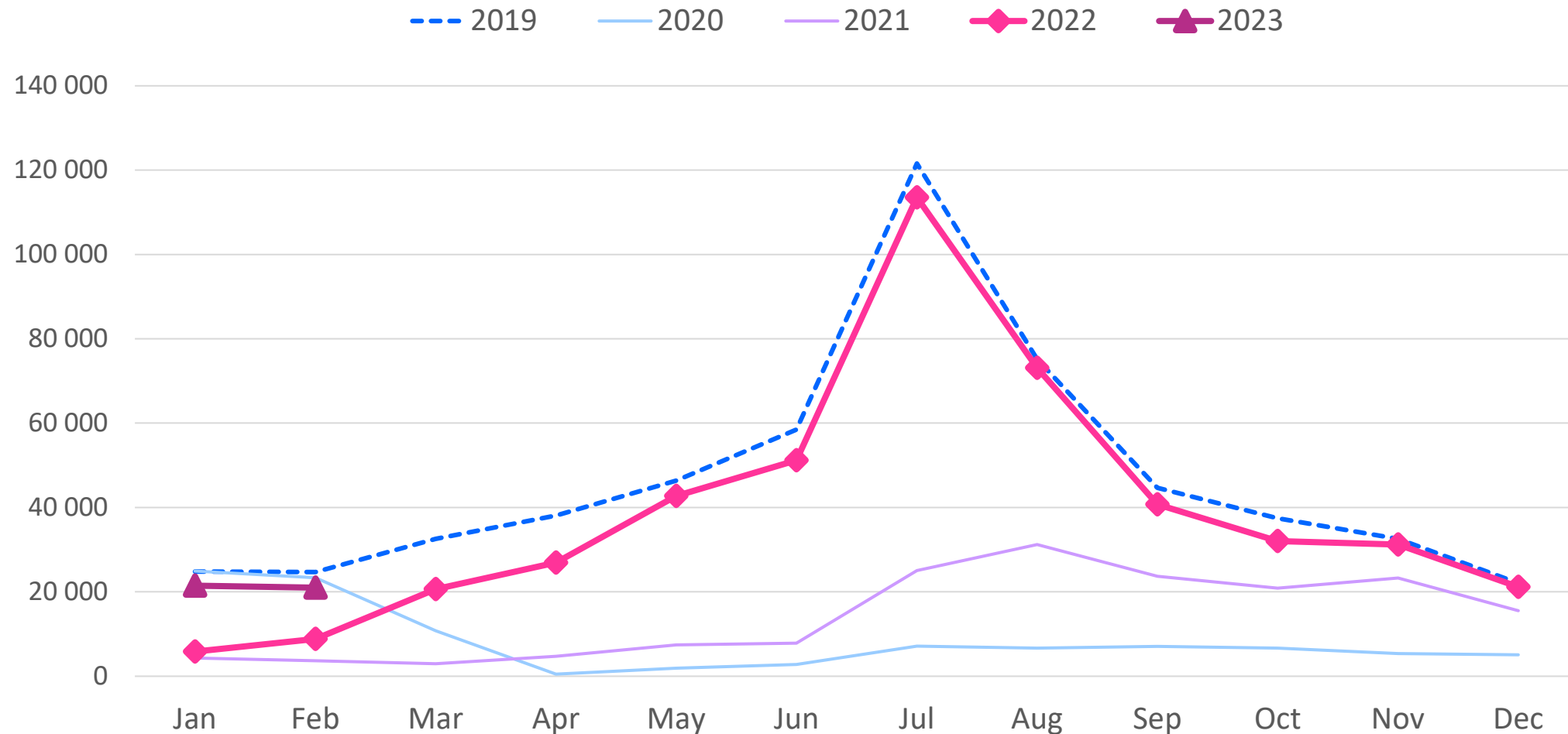
Swedish overnights in main marketing areas



Sweden – Seasonal Overnights in Finland 2012-2022



Swedish monthly overnights in Finland 2019-2023

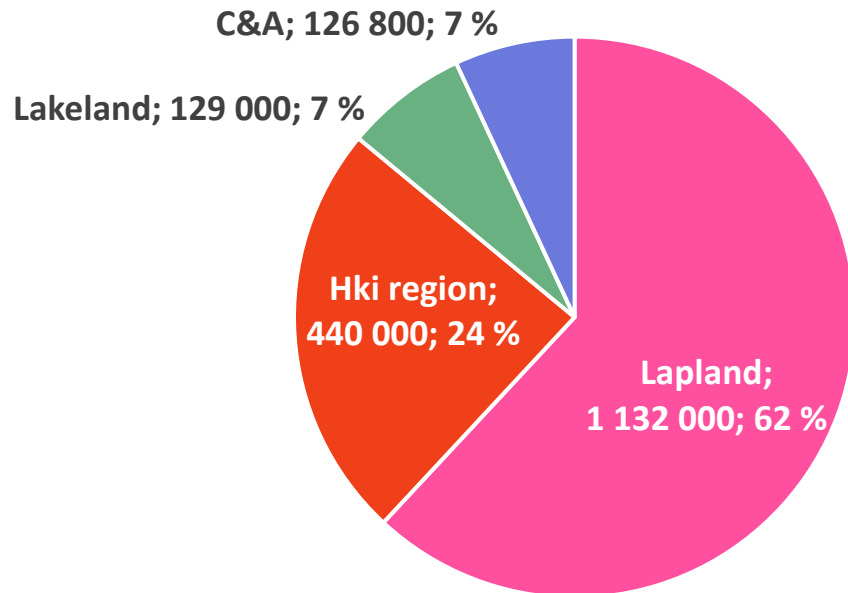


Foreign overnights in high winter season 2022-2023

And change compared to pre-pandemic

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%)



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%

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%

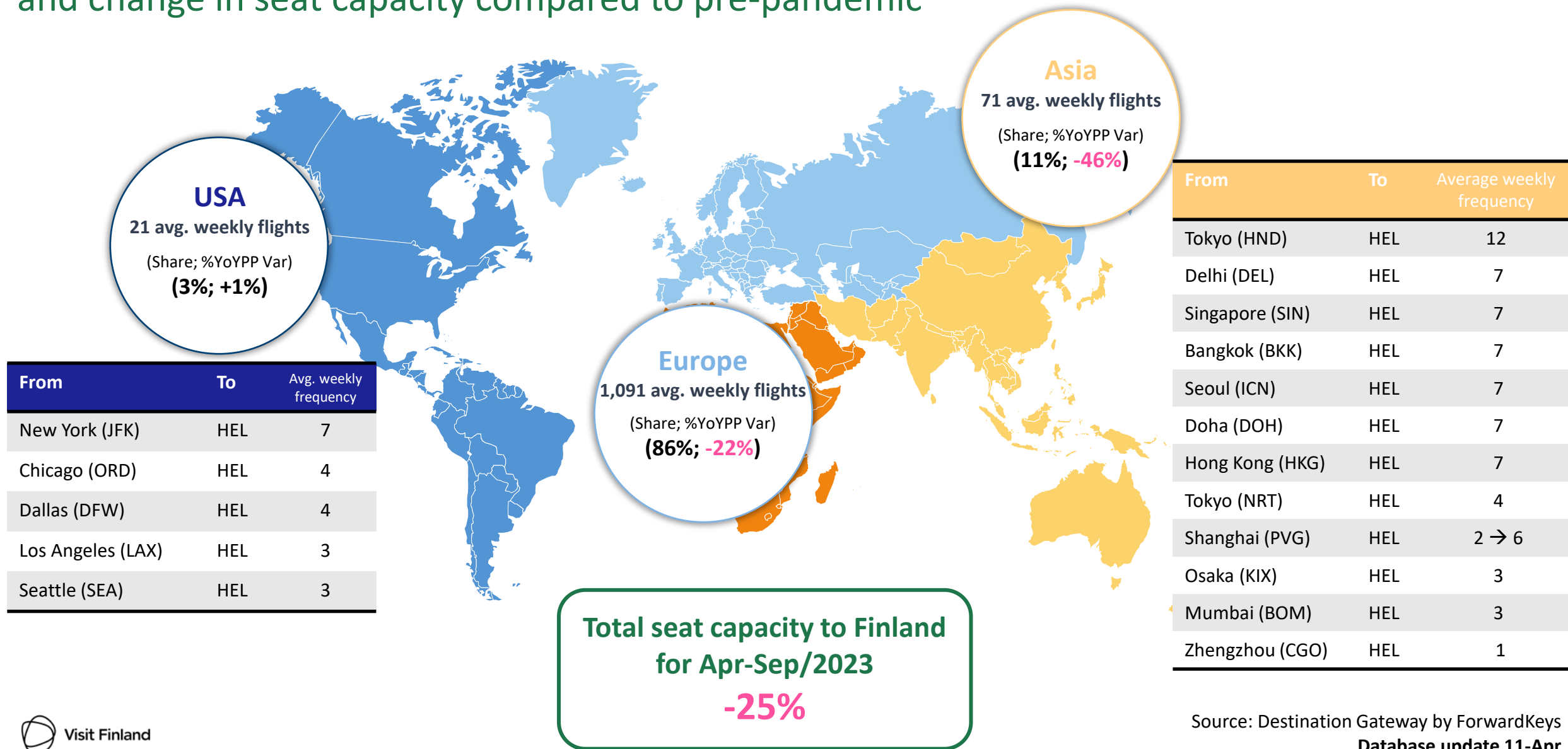


ForwardKeys

Seat capacity

Direct flights to Finland April – September 2023

and change in seat capacity compared to pre-pandemic

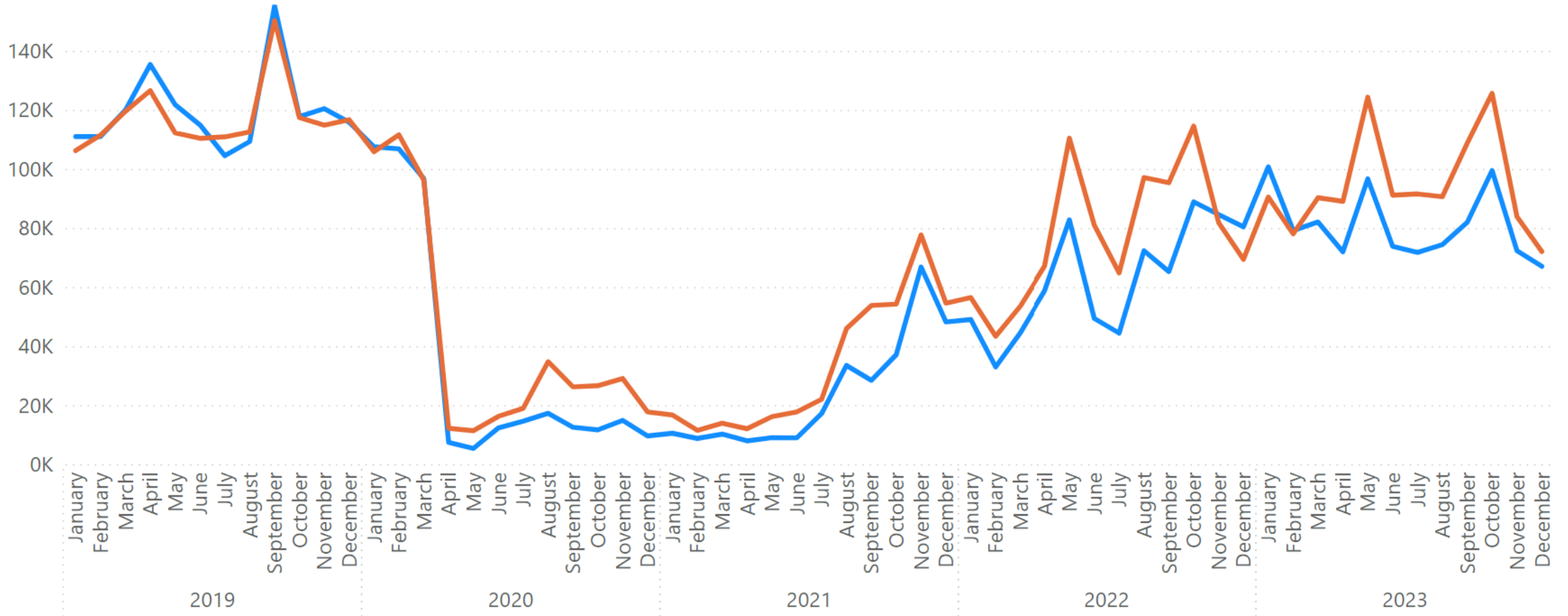


Monthly seat capacity from Sweden to FIN & NOR

2019-2023

TOTAL SEAT CAPACITY
 DESTINATION COUNTRY: ● FI ● NO

From Sweden



Seat capacity from Sweden to Finland / Apr-Sep 2023

Comparison to pre-pandemic

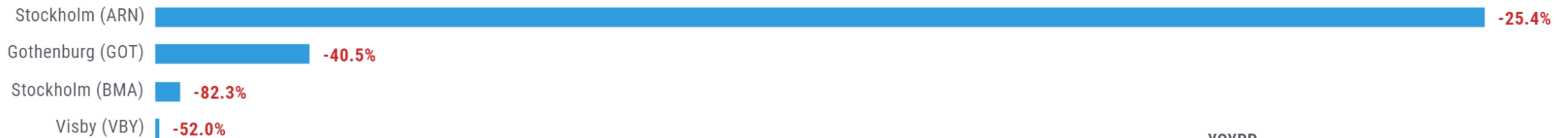
✈️ Sweden (excl. domestic) → Finland Pre-pandemic analysis

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

Flight origins

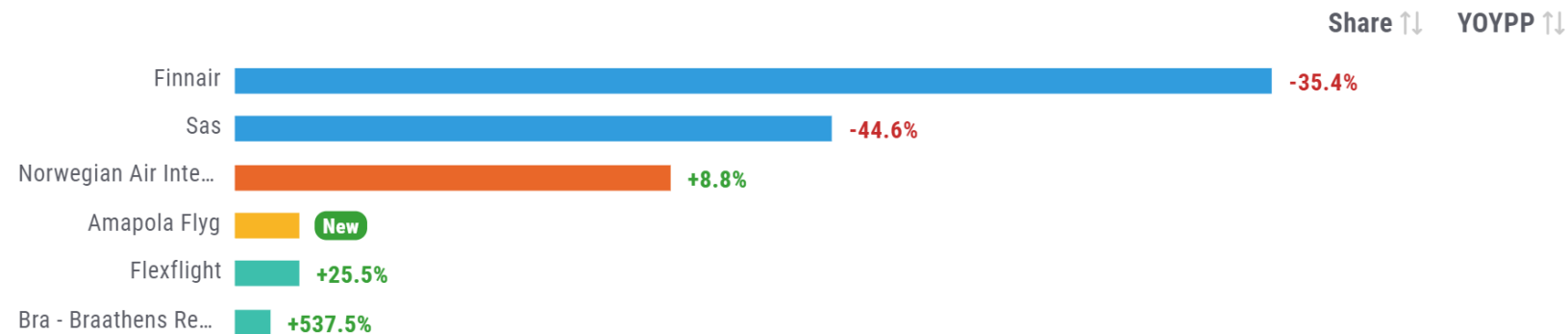
5 airports **-34.0%** YOYPP for selected locations

Seat capacity from Sweden to **Finland** will be **34% below** the pre-pandemic during spring-summer 2023



-34.0% YOYPP for selected airlines

- Finnair flies from Arlanda and Gothenburg to Helsinki. In addition, it has flights to/from Visby 3 times a week from mid-Jun to beg-Aug.
- SAS flies from Arlanda to Helsinki, Turku and Vaasa.
- Amapola and Flexflight both operates from Arlanda to Mariehamn.
- Braathens flies from Stockholm-Bromma to Helsinki appx. 5 times a week (except in July).



Seat capacity from Sweden to Norway / Apr-Sep 2023

Comparison to pre-pandemic

✈ Sweden (excl. domestic) → Norway **Pre-pandemic analysis** | 7 airlines selected

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

Flight origins

3 airports **-17.4%** YOYPP for selected locations

Seat capacity from Sweden to Norway will be **17% below** the pre-pandemic during spring-summer 2023

Stockholm (ARN) **-14.5%**

Gothenburg (GOT) **-15.6%**

Visby (VBY) | **New**

-17.4% YOYPP for selected airlines

Sas **-17.2%**

Norwegian Air Shut... **-29.0%**

Norwegian Air Inte... **+1,026.2%**

Wideroe'S Flyvesel... **-15.6%**

Bra - Braathens Re... | **New**



ForwardKeys

Flight arrivals/bookings

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

-12%

-10%

USA

-10%

-9%

UK

-14%

-14%

Switzerland

-21%

-19%

France

+32%

+36%

Hong Kong

+67%

+92%

Netherlands

+15%

+28%

Italy

+4%

+8%

Spain

+34%

+60%

Sweden

+6%

+10%

Japan

-71%

-70%

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 Sweden

Comparison to pre-pandemic

- Air travel from Sweden to Finland and Norway seems to be recovering this summer
- June bookings to Finland are at the moment 26% above the 2019 level

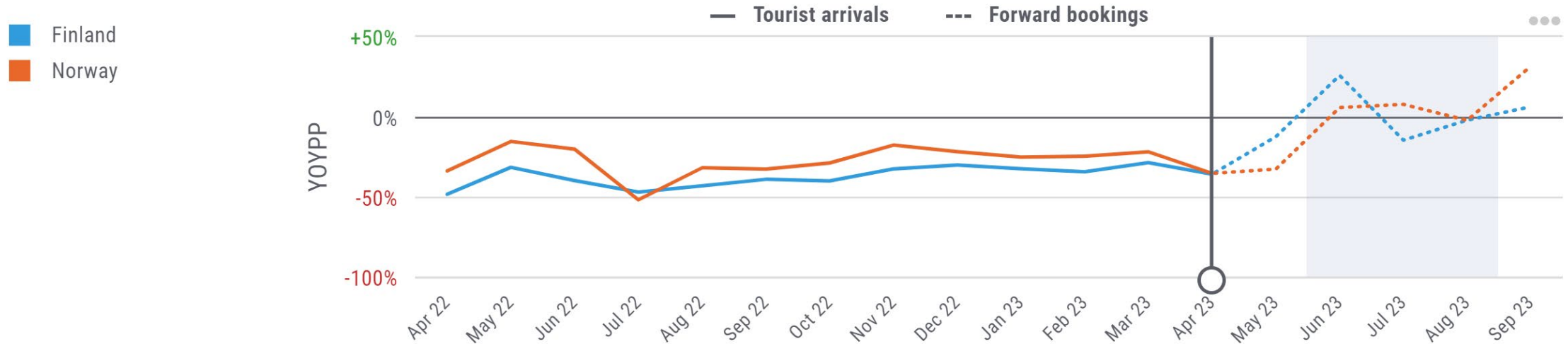
Destination benchmark

YOYPP of tourist arrivals

Data updated 09-Apr

Sweden - Change in arrivals / bookings vs. pre-pandemic

Tourist arrivals to my competing destinations

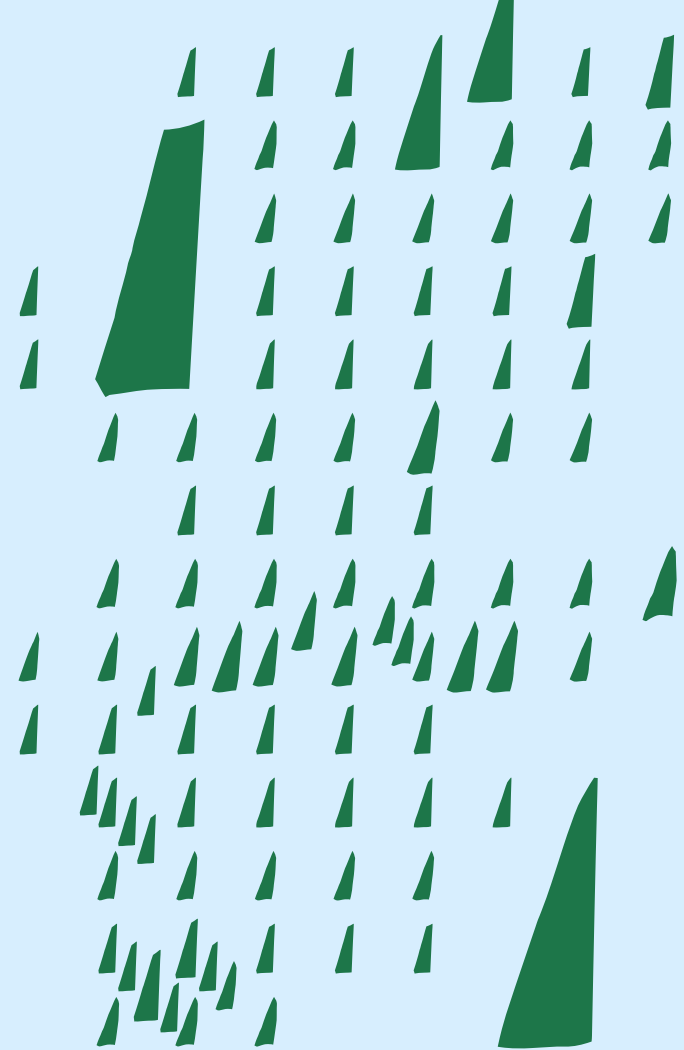


Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.
Most of the charter flights also missing.

Source: ForwardKeys Destination Gateway

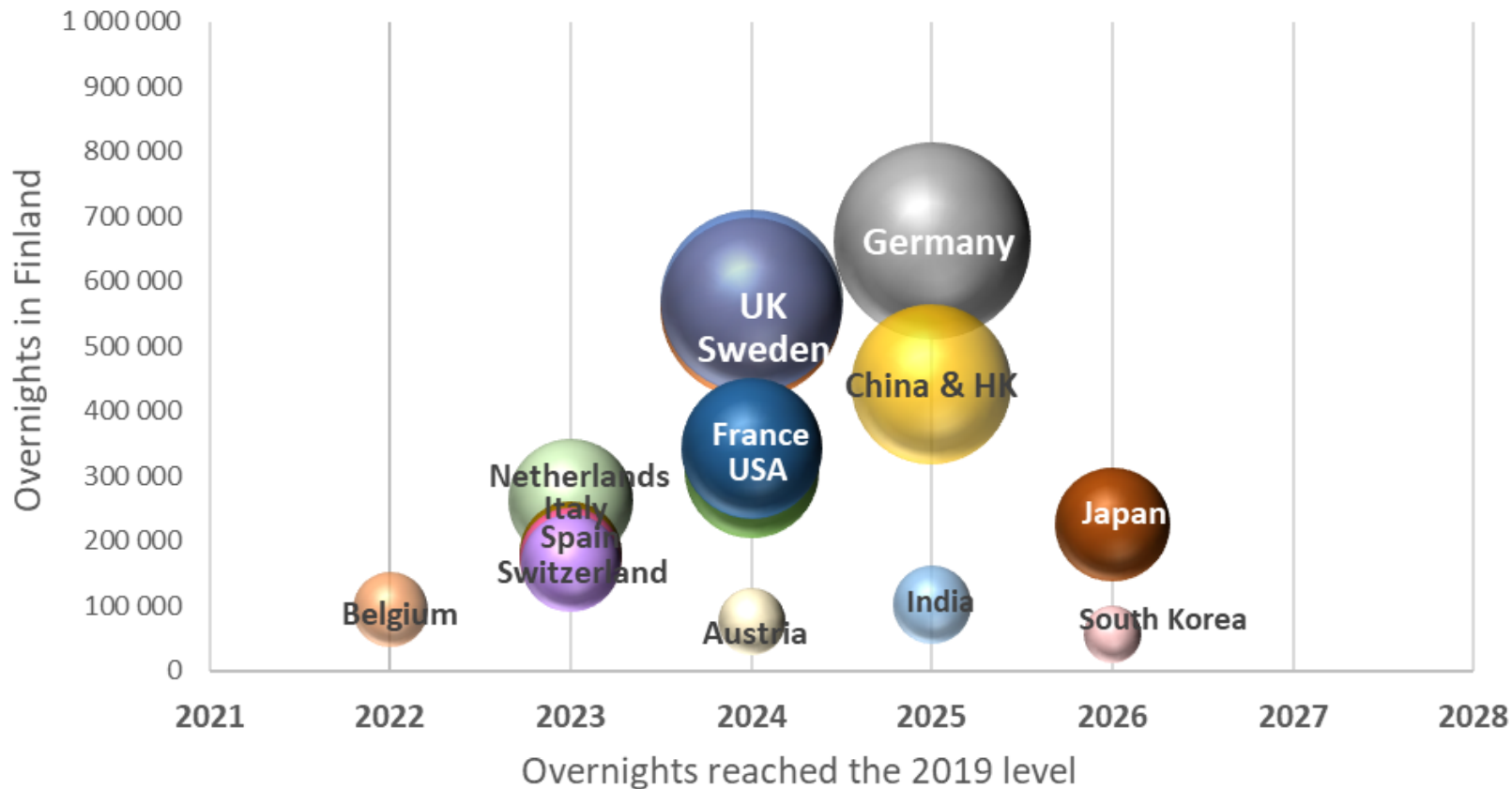
Oxford Economics forecast for Travel Recovery



Overnights – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Overnights in Finland reached the level of 2019



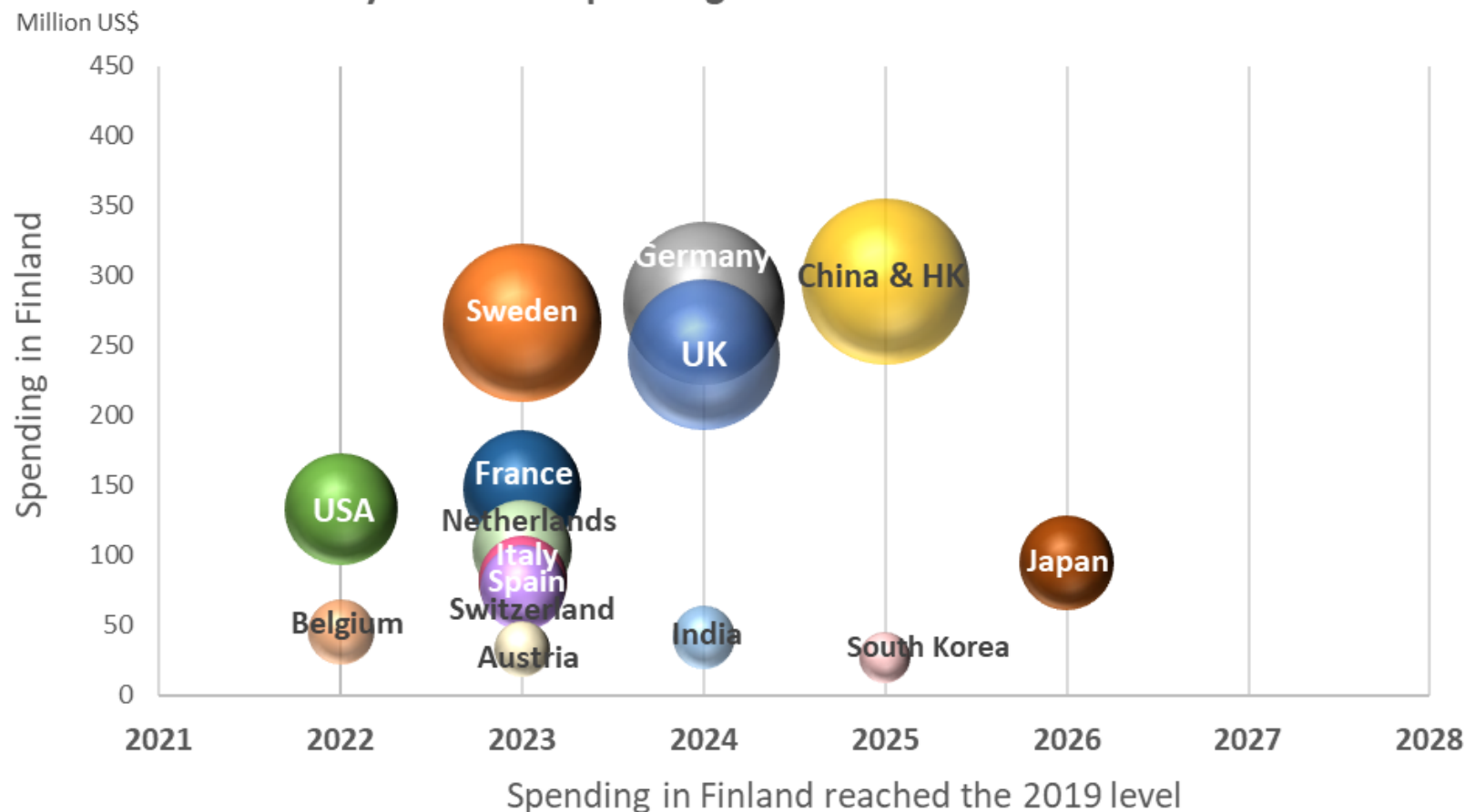
	No. of overnights in 2023	comp. to 2019
Germany	546 200	-17 %
Sweden	523 300	-6 %
UK	503 100	-12 %
France	329 900	-3 %
Netherlands	298 100	14 %
USA	290 400	-6 %
Italy	193 800	7 %
Spain	193 700	11 %
Russia*	180 200	-78 %
China	174 200	-61 %
Switzerland	167 700	1 %
Belgium	122 200	30 %
Japan	91 200	-59 %
Austria	74 000	-3 %
India	71 300	-30 %
South Korea	37 100	-34 %

Source: Oxford Economics, databank update Mar 27, 2023

Spending – Recovery to 2019 levels

Databank update March/2023

Recovery timeline - Spending in Finland reached the level of 2019



Source: Oxford Economics, databank update Mar 27, 2023

	Spending (Million US\$) in 2023	comp.to 2019
Sweden	260,6	-2 %
Germany	225,2	-20 %
United Kingdom	212,1	-13 %
France	143,6	-2 %
United States**	124,3	-6 %
China	113,3	-62 %
Netherlands	113,3	9 %
Spain	89,6	9 %
Italy	88,8	10 %
Russia	79,2	-79 %
Switzerland	77,3	1 %
Belgium	57,9	28 %
Japan	35,7	-62 %
Austria	32,3	-2 %
India	30,9	-25 %
South Korea	19,4	-26 %

**) USA will recover to 2019 level in 2022, but will remain slightly below 2019 level in 2023

