



Visit Finland

# VF monthly follow-up

April 2025

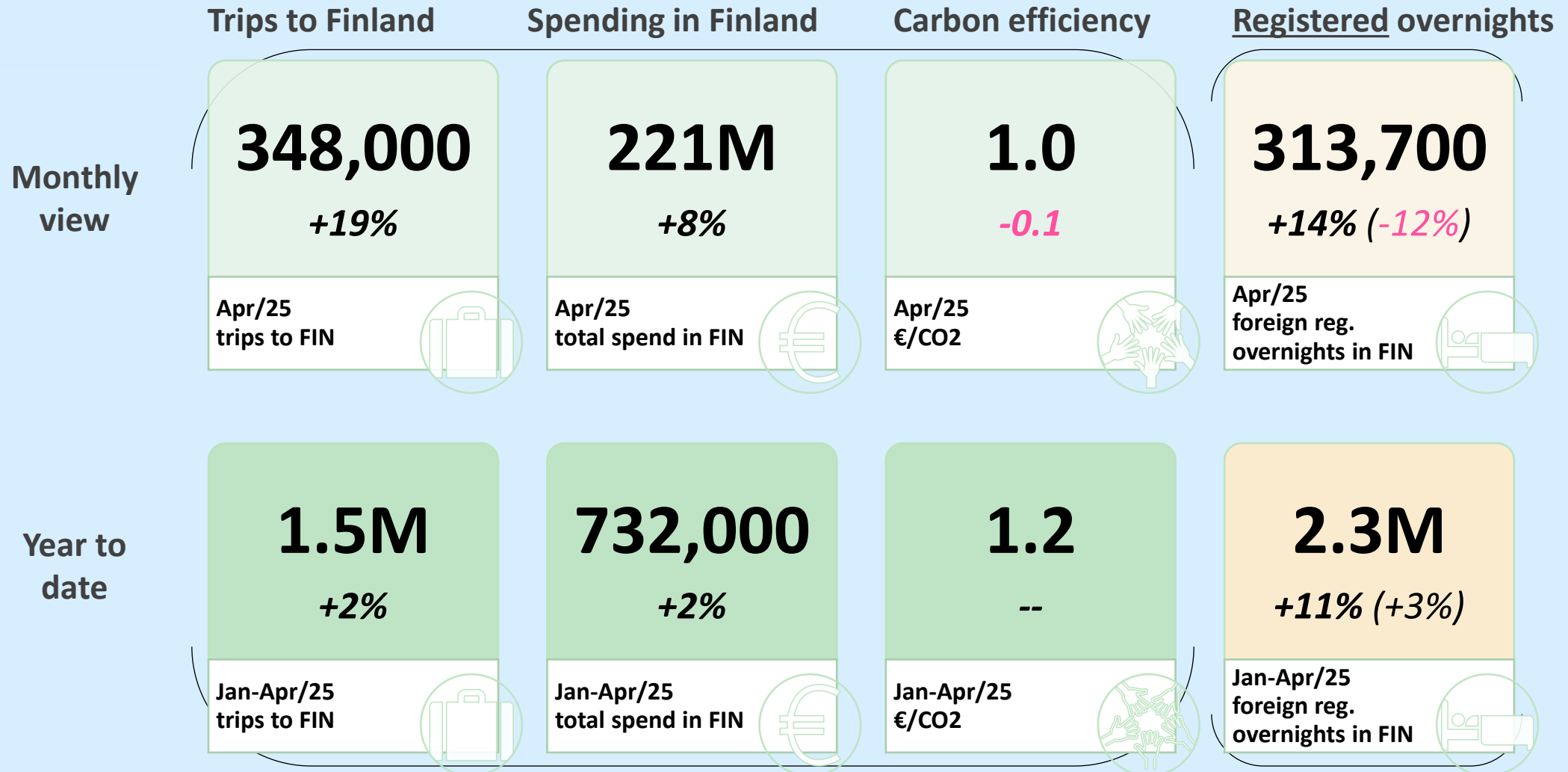
# Summary

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

- The **number of travellers to Finland** from January to April 2025 has seen a **modest rise** compared to the same timeframe last year. **Leisure travel grew by 7%**, while **business travel** experienced a **decline of 10%**. Consequently, the **total spend by leisure visitors** was **11% greater** than the previous year, whereas spending by **business travellers fell by 20%**.
- In terms of **registered foreign overnight stays**, there was an **11% increase** compared to the prior year, and this figure was also *3% higher than the levels recorded from January to April 2019*.
- Also, the **Nordic region** has experienced **10% growth** in **registered foreign overnight stays** from January to April 2025 compared to the same period last year.
- **Flight bookings for the summer high season (Jun-Aug)** show also **positive development to Finland, Sweden, and Norway** compared to the previous year. *However, only Norway exceeds the level in flight bookings of 2019.*

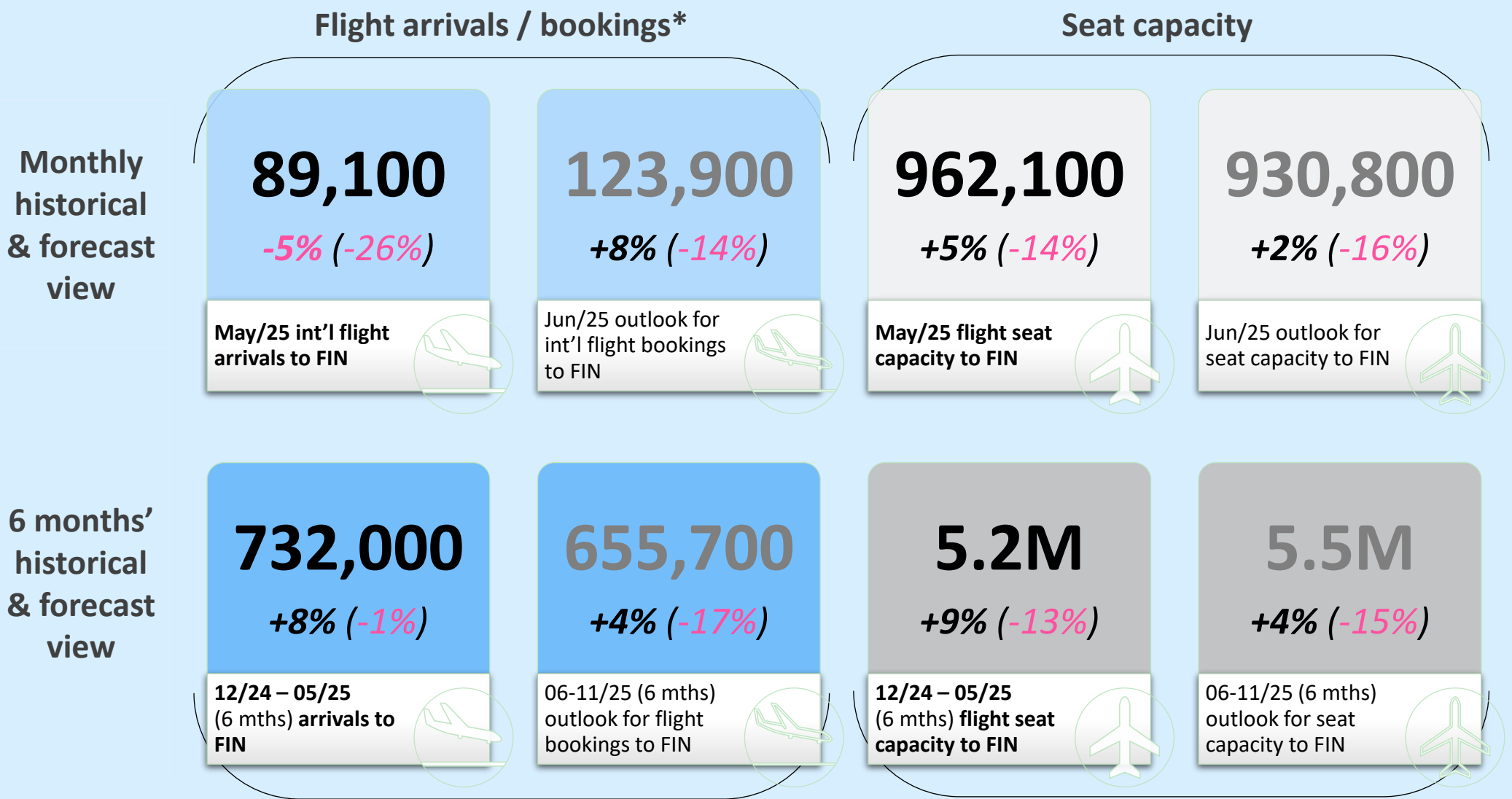
# Foreign Trips to Finland & Spending & Carbon efficiency, Registered overnights

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



# Int'l Flight Bookings & Seat Capacity to Finland

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

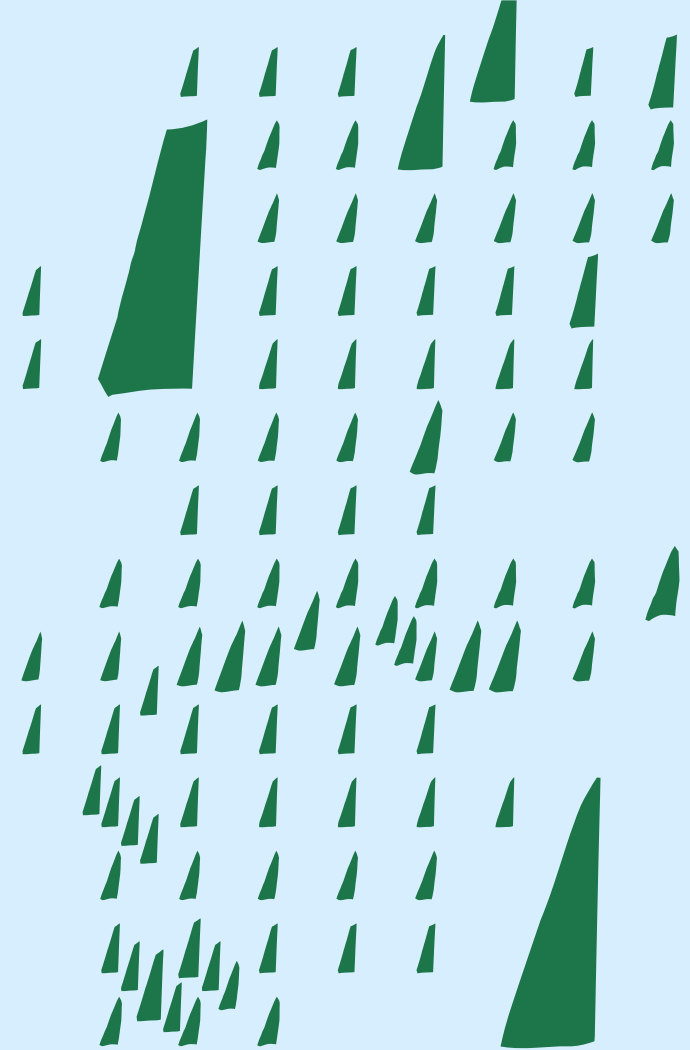


\*) Flight bookings including at least 1 night stay in Finland.

# Border Survey

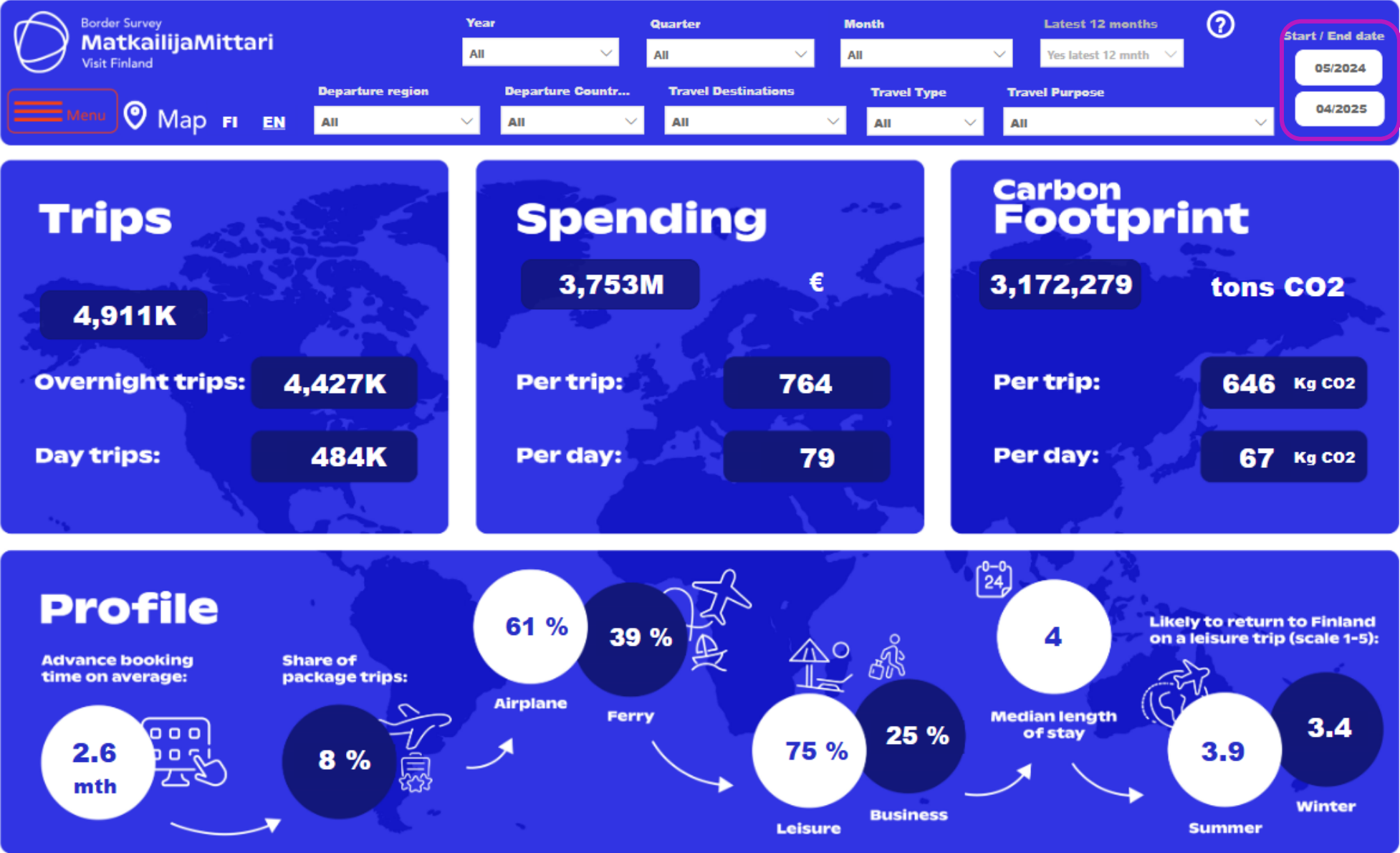
Latest 12 months (May/2024 – Apr/2025)

- **4.9 million** visitors (YoY +3%)
  - 90% overnight trips
- Spending **3.8 billion€** (YoY -5%)
  - 764 € / trip (YoY -7%)
  - 79 € / day (YoY +5%)
- **75%** travelling for **leisure** (YoY +2 %-points)
- Advance booking time, avg **2.6 months** (+0.1 months)
- Median length of stay **4 nights** (YoY no change)





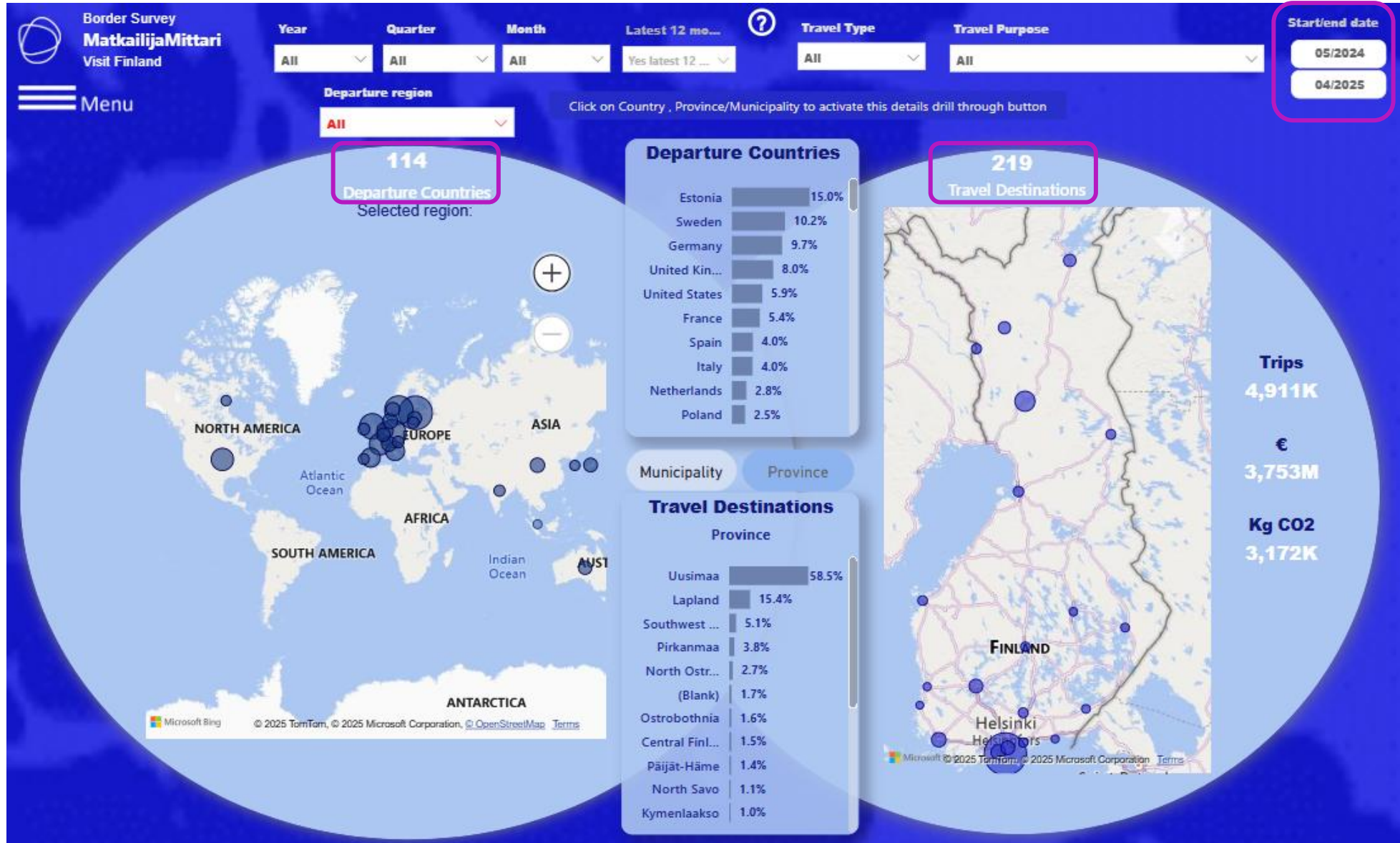
# Border Survey / latest 12 months (May/2024 – Apr/2025)



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

Foreign visitors in Finland

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



Top5 source markets for leisure/personal trips

- Estonia
- Germany
- Sweden
- UK
- USA

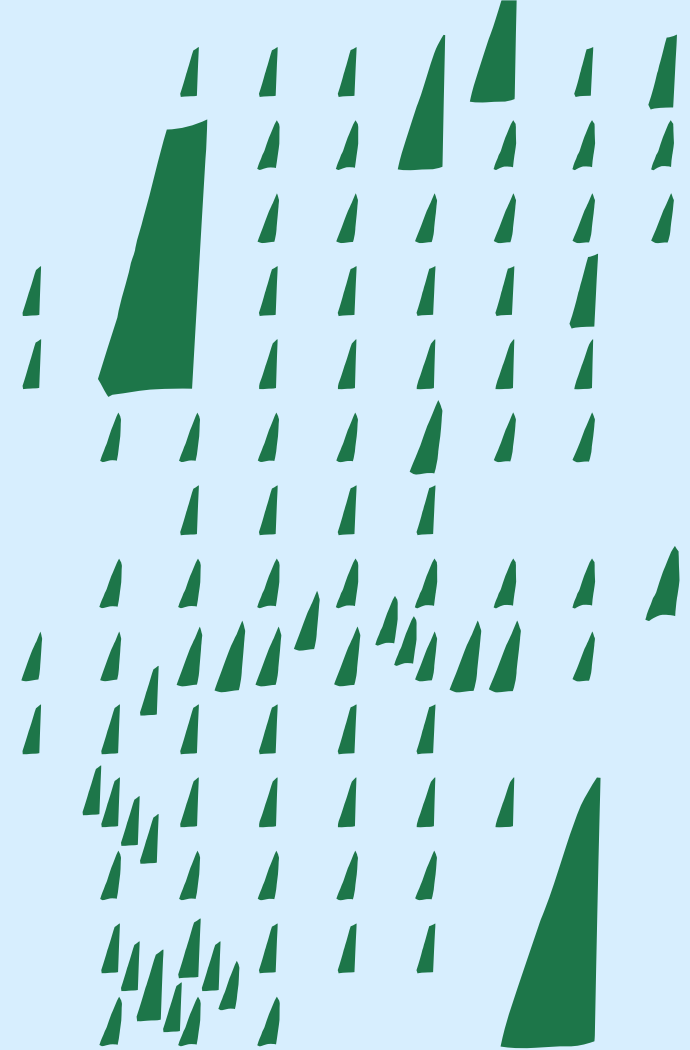
Top5 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Poland

# Border Survey

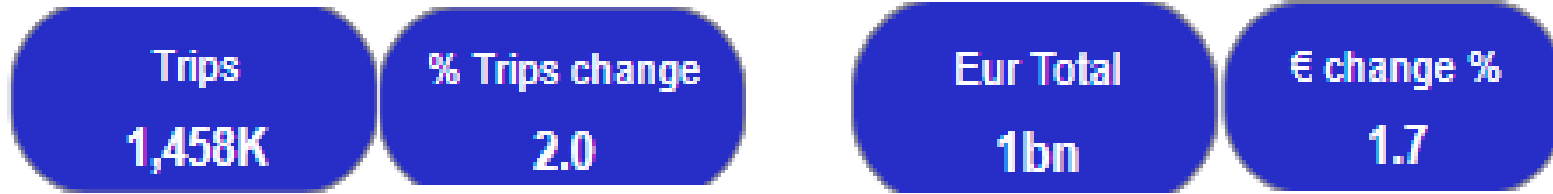
January-April 2025

- Trips and spend **increased by 2%** compared to January-April 2024.
  - This growth was driven by a higher demand for leisure travel, particularly for **vacation and recreational trips to Lapland**.
  - There was a decline in business travel compared to the previous year.
- The largest number of visitors originated from **Estonia, Germany, the UK, France, and Sweden**.
- **Germany, France, the UK, Estonia, and the USA** were the main contributors to the total spend in Finland.





# Trips and spending increased by 2% during Jan-Apr 2025



- **Leisure travel** to Finland **increased by 7%** during the first four months of this year. Visitors travelling for leisure purposes also **spent 11% more** in Finland compared to Jan-Apr 2024.
- On the other hand, **business travel decreased** at the same time by **10%** and the **total spend** by business travellers **decreased** as much as **20%** compared to Jan-Apr 2024.

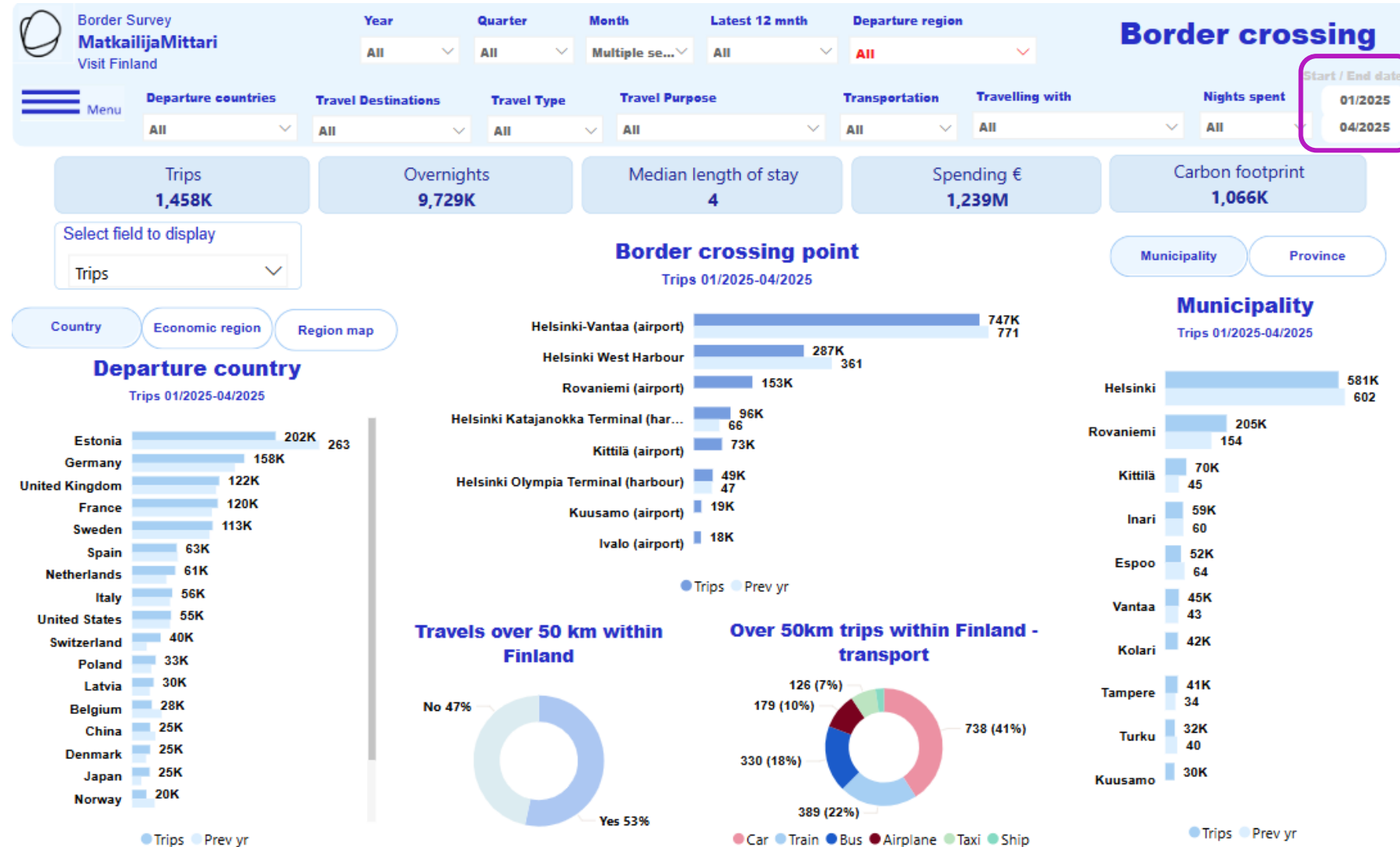


# Trips to Finland during Jan-Apr 2025

## All foreign visitors in Finland

Jan-Apr 2025 vs. Jan-Apr 2024

- With better air connectivity, there were more visitors arriving to Finland **through the airports in Lapland**. Thus, the **main destination** was more often also in **Lapland** than year before.
- More than half** of the visitors travelled over **50 km within Finland**. Car and train were the most used means of transport.

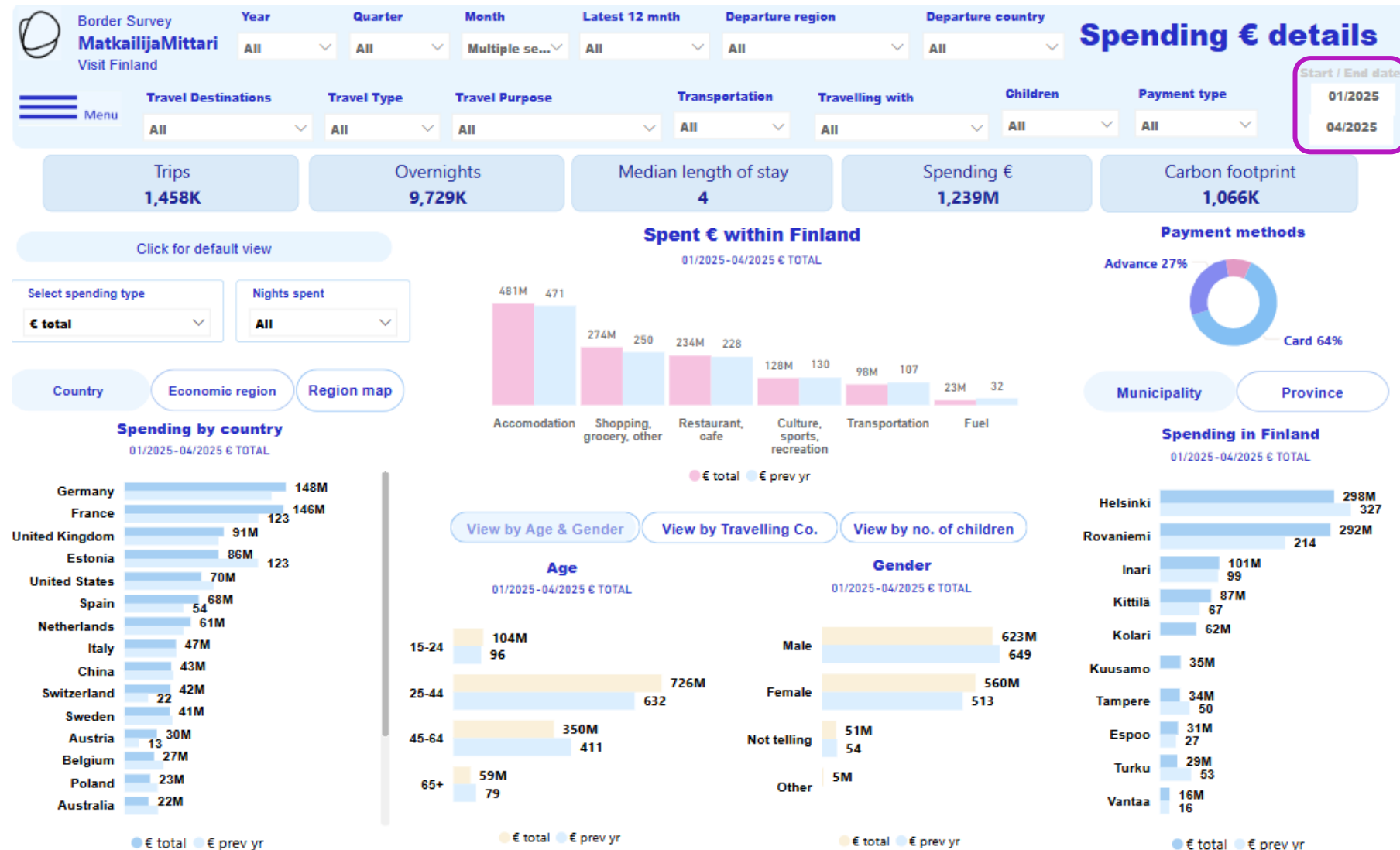


# Spend in Finland during Jan-Apr 2025

## All foreign visitors in Finland

Jan-Apr 2025 vs. Jan-Apr 2024

- **Total spend was highest** for visitors coming from **Germany** and **France** and their total spend also **increased** clearly compared to the previous year.
- **Destinations in Lapland** were benefitting clearly from the higher total spend.
- **Nearly 40%** of the total spend was used for **accommodation**. The shares of **shopping** (incl. grocery) as well as **restaurants and cafes** were both around **20%** of the total spend.



# Trips and Spending by top5 source markets

## All foreign visitors in Finland

Country	Vacation Trips	YoY trips change %
<b>Estonia</b>	<b>202 000</b>	<b>-23%</b>
Germany	158 000	+9%
UK	122 000	+4%
France	120 000	+7%
Sweden	113 000	+4%

Country	M€ total	YoY € change %
<b>Germany</b>	<b>148.1</b>	<b>+10%</b>
<b>France</b>	<b>145.9</b>	<b>+19%</b>
UK	91.1	+5%
Estonia	86.2	-30%
USA	70.3	-14%

Country	€ / trip	YoY € / trip change %
<b>China</b>	<b>1,696</b>	<b>+24%</b>
<b>Austria</b>	<b>1,572</b>	<b>+50%</b>
USA	1,283	-16%
Australia	1,263	-30%
France	1,213	+11%

Country	€ / day	YoY € / day change %
<b>Italy</b>	<b>170</b>	<b>+14%</b>
<b>France</b>	<b>158</b>	<b>+67%</b>
<b>Netherlands</b>	<b>152</b>	<b>+1%</b>
Australia	146	-20%
Belgium	146	-1%

## Vacation/recreation travellers in Finland

Country	Vacation Trips	YoY trips change %
<b>France</b>	<b>92 000</b>	<b>+27%</b>
<b>Germany</b>	<b>91 000</b>	<b>+17%</b>
UK	70 000	+26%
Estonia	54 000	+13%
Italy	41 000	+4%
Sweden	41 000	+54%

Country	M€ total	YoY € change %
<b>France</b>	<b>123.3</b>	<b>+36%</b>
<b>Germany</b>	<b>102.9</b>	<b>+35%</b>
UK	60.6	+22%
USA	49.1	-22%
Netherlands	48.3	+4%

Country	€ / trip	YoY € / trip change %
<b>France</b>	<b>1,338</b>	<b>+7%</b>
<b>Switzerland</b>	<b>1,320</b>	<b>-11%</b>
USA	1,291	-35%
Spain	1,270	+50%
Netherlands	1,223	-8%

Country	€ / day	YoY € / day change %
<b>Spain</b>	<b>220</b>	<b>+40%</b>
<b>France</b>	<b>209</b>	<b>+27%</b>
Netherlands	190	+8%
Italy	188	-3%
Belgium	183	+3%



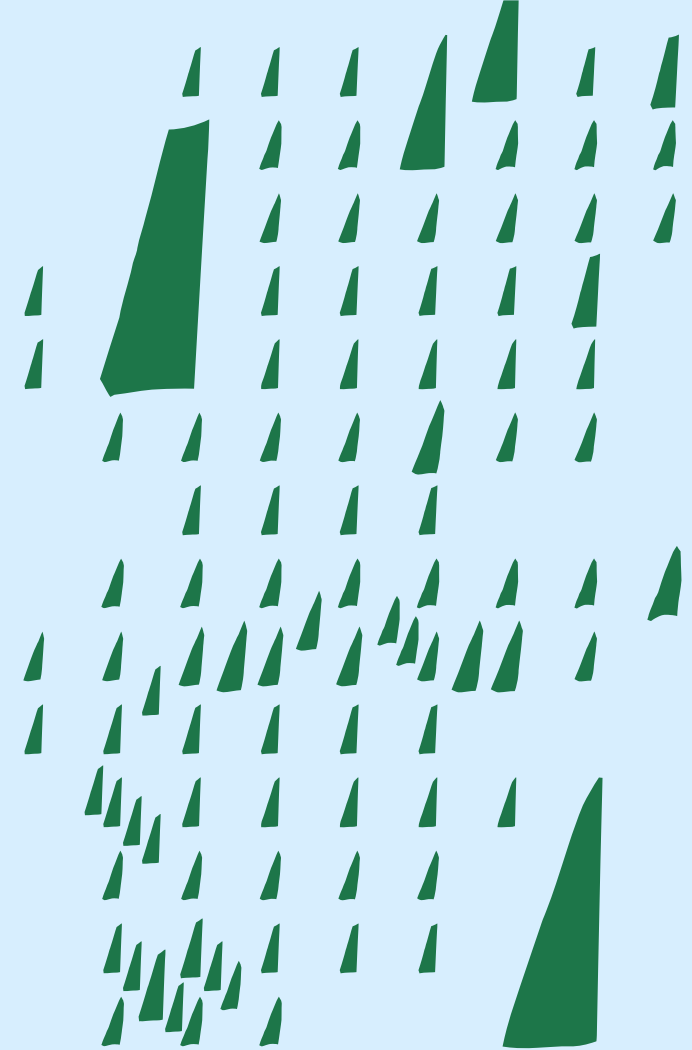
# Registered Overnights

## January – April 2025

- The number of registered foreign overnights reached **2.3 million**, marking an **11%** increase from the previous year. *This figure also surpassed the levels of 2019 by 3%.* The leading source markets were **Germany, France, UK, and the Netherlands.**
- Overall accommodation revenue grew by **4%**, with foreign revenue rising by **18%** compared to January-April 2024 (domestic revenue fell by 4%), and **foreign revenue accounted for 43%** of the total accommodation revenue.

## April 2025

- Total foreign overnights reached **313,700** (+14% YoY, & **-12%** compared to April 2019).
- Leading source markets included **Sweden, Germany, USA, UK, and Norway.**
- Top destinations were **Helsinki**, Vantaa, Rovaniemi, Kittilä-Levi, and Turku.



# Registered overnights Jan-Apr 2025

	Jan-Apr 2025	Change-% vs. Jan-Apr 2024	Change-% vs. Jan-Apr 2019
Total	6.7M	+1%	-1%
Domestic	4.4M	-4%	-3%
Foreign, total	2.3M	+11%	+3%
Foreign excl. Russia	2.3M	+11%	+18%
Scandinavia	198,200	+7%	-4%
EU-27 + UK	1.4M	+5%	+22%
America	165,400	+14%	+65%
Asia	363,200	+40%	-2%



# Main source markets

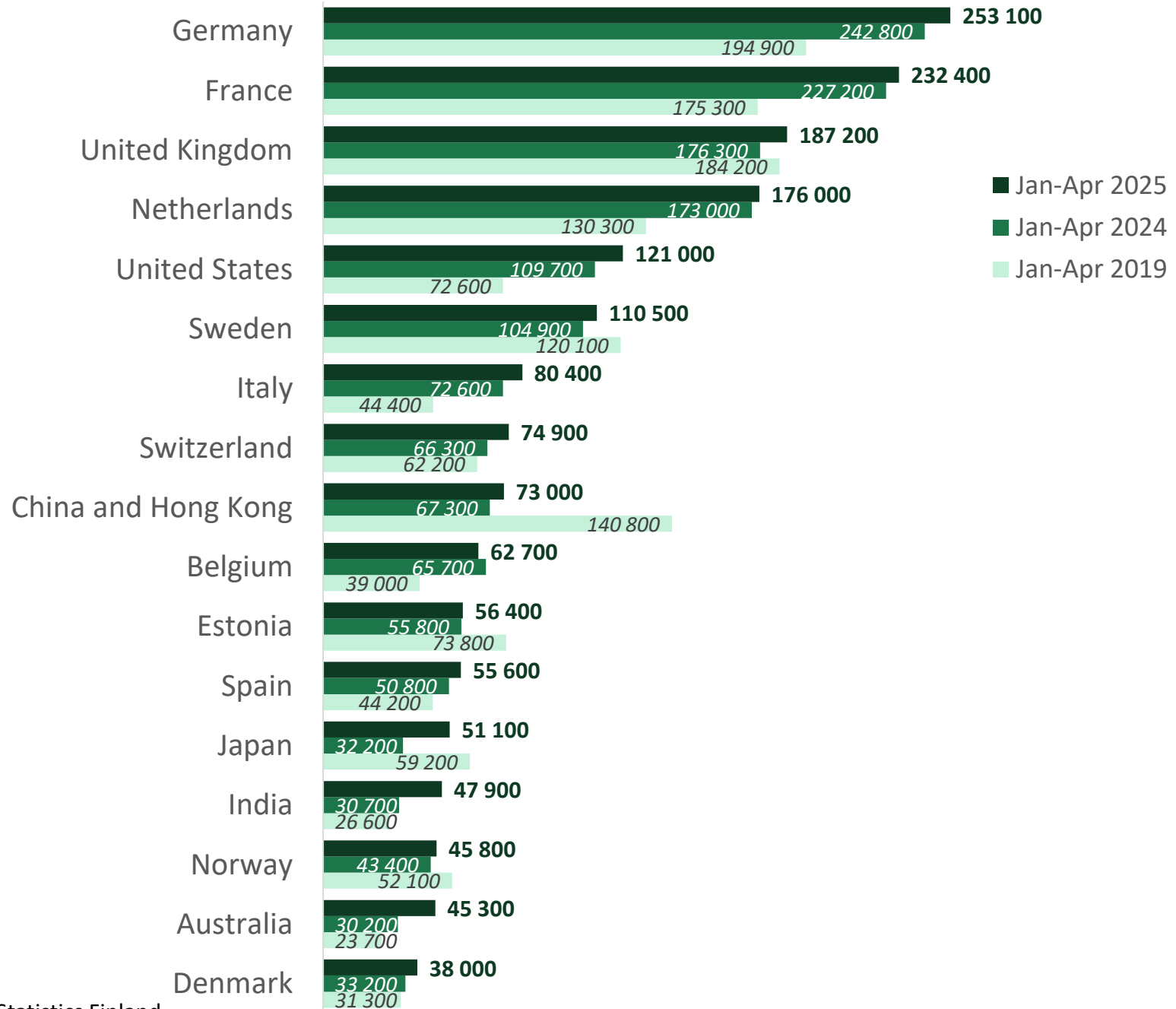
## Jan-Apr 2025

vs. Jan-Apr 2024 & Jan-Apr 2019

Between January and April 2025, **Germany** and **France** emerged as the leading source markets in terms of **registered overnights**.

The number of overnights **surpassed the previous year's totals from all main source markets**, with the exception of Belgium.

*In comparison to January-April 2019, overnights from Sweden (-8%), China including Hong Kong (-48%), Estonia (-24%), Japan (-14%), and Norway (-12%) continued to fall short of pre-pandemic figures.*





Year

2019 2020 2021 2022 2023 2024 Latest

Year month

Jan Feb Mar Apr

Overnights 6.7M TOTAL overnights	YoY change % 1 YoY change %	Foreign 2.3M Overnights	YoY change % 11.3 Foreign	Domestic 4.4M Overnights	YoY change % -4 Domestic	Revenue 481.0M TOTAL revenue	YoY change % 4 YoY change %	View Main regions, Regions by Domestic Foreign
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VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

REGIONAL OVERNIGHTS

OVERNIGHTS FOREIGN REGION 2025,  
202501-202504

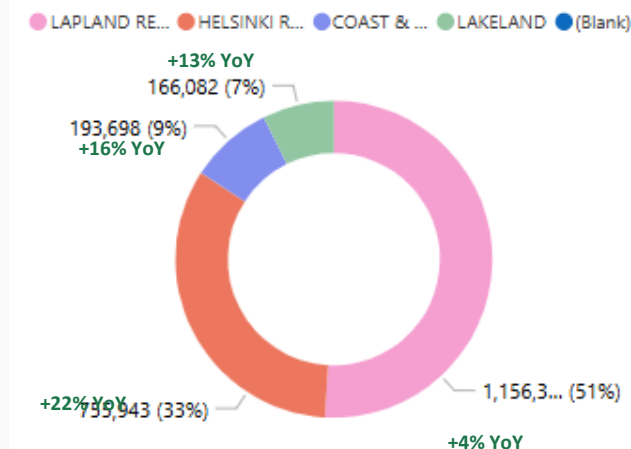
Foreign excluding Russia	2,268,192
Europe	1,589,069
EU-28	1,447,229
EU-27 excluding UK	1,260,079
Asia	363,198
Scandinavia	198,200
America	165,377
Oceania	48,254

REVENUE 2025

OVERNIGHTS BY COUNTRY YEAR 2025,  
202501-202504

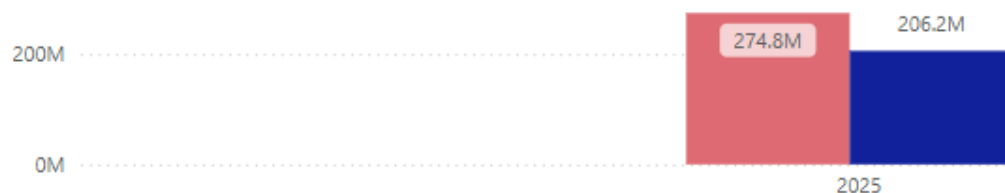
Germany	253,135
France	232,442
United Kingdom	187,150
Netherlands	175,994
United States	121,009
Sweden	110,467
Italy	80,384
Switzerland	74,862

OVERNIGHTS IN MAIN REGIONS YEAR 2025, 202501-202504



Sources: Statistics Service Rudolf, Statistics Finland

Domestic revenue Foreign revenue  
-4% YoY +18% YoY



The proportion of **foreign overnight stays** accounted for **34%** of the total registered stays. Meanwhile, the share of **foreign revenue** reached an impressive **43%**.

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

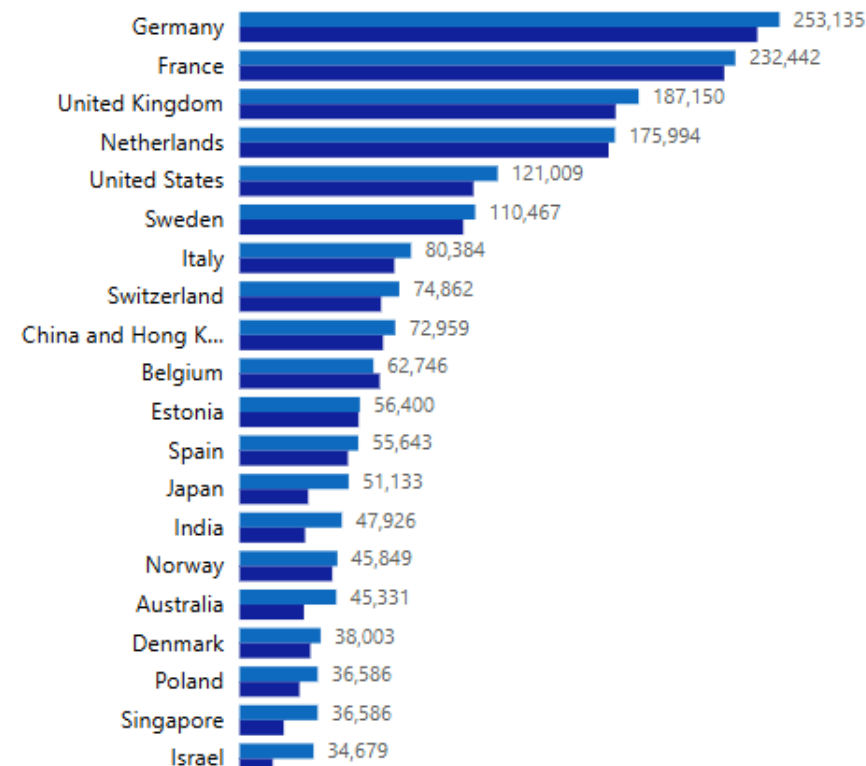
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2025 compared to 2024 months 1-4

Main area	2025 MAX year	2024 MIN year	Change %
<b>LAPLAND REGION</b>	<b>1,156,376</b>	<b>1,093,306</b>	<b>5.8</b>
<b>HELSINKI REGION</b>	<b>755,943</b>	<b>626,477</b>	<b>20.7</b>
<b>COAST &amp; ARCHIPELAGO</b>	<b>193,698</b>	<b>171,542</b>	<b>12.9</b>
North Ostrobothnia (excl. Kuusamo)	60,204	51,423	17.1
Southwest Finland	36,679	31,161	17.7
Uusimaa 2 (excl. Helsinki Metropolitan Area)	24,898	21,832	14.0
Satakunta	19,195	20,125	-4.6
Ostrobothnia	17,804	13,719	29.8
Åland	15,831	17,059	-7.2
Kymenlaakso	8,354	6,632	26.0
South Ostrobothnia	6,770	6,321	7.1
Central Ostrobothnia	3,963	3,270	21.2
<b>LAKELAND</b>	<b>166,082</b>	<b>150,376</b>	<b>10.4</b>
Pirkanmaa	45,611	45,983	-0.8
Central Finland	44,742	33,127	35.1
Päijät-Häme	17,474	15,144	15.4
Kainuu	15,898	13,346	19.1
North Savo	13,745	11,796	16.5
South Savo	7,928	8,546	-7.2
North Karelia	7,375	9,861	-25.2
South Karelia	6,698	7,149	-6.3
Kanta-Häme	6,611	5,424	21.9
<b>Total</b>	<b>2,272,099</b>	<b>2,041,701</b>	<b>11.3</b>

OVERNIGHTS 2025 compared to 2024 months 1-4

● MAX year ● MIN year



The most popular destinations during Jan-Apr 2025:

	YoY change
<b>Helsinki</b>	<b>+19%</b>
<b>Rovaniemi</b>	<b>+10%</b>
Kittilä-Levi	+5%
Inari-Saariselkä	-1%
Vantaa	+34%
Kolari-Ylläs	+4%
Kuusamo	+15%
Sodankylä	-8%

From the most popular destinations only Helsinki was slightly below (-2%) the figures of Jan-Apr 2019.

# Registered foreign overnights increased 14% in April

## April 2025

**313,700** total foreign overnights; **+14%** vs. 04/2024, **(-12%** vs. 04/2019)

**312,700** foreign excl. Russia; **+14%**, **(-1%**)

**187,200** EU+UK; **+10%**, **(+1%)**

**59,800** Scandinavia; **+7%**, **(-8%)**

**46,300** Asia; **+38%**, **(-19%)**

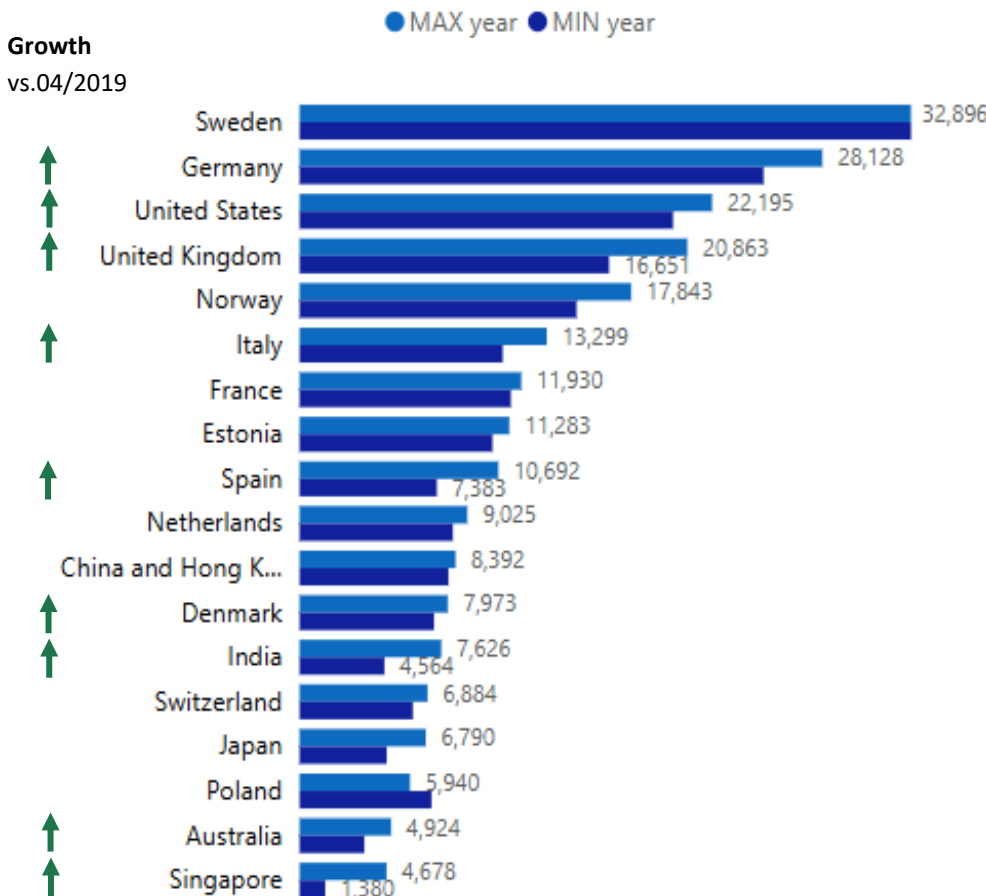
**29,600** America; **+9%**, **(+16%)**

**Top destinations** total foreign; vs. 04/2024, (vs. 04/2019)

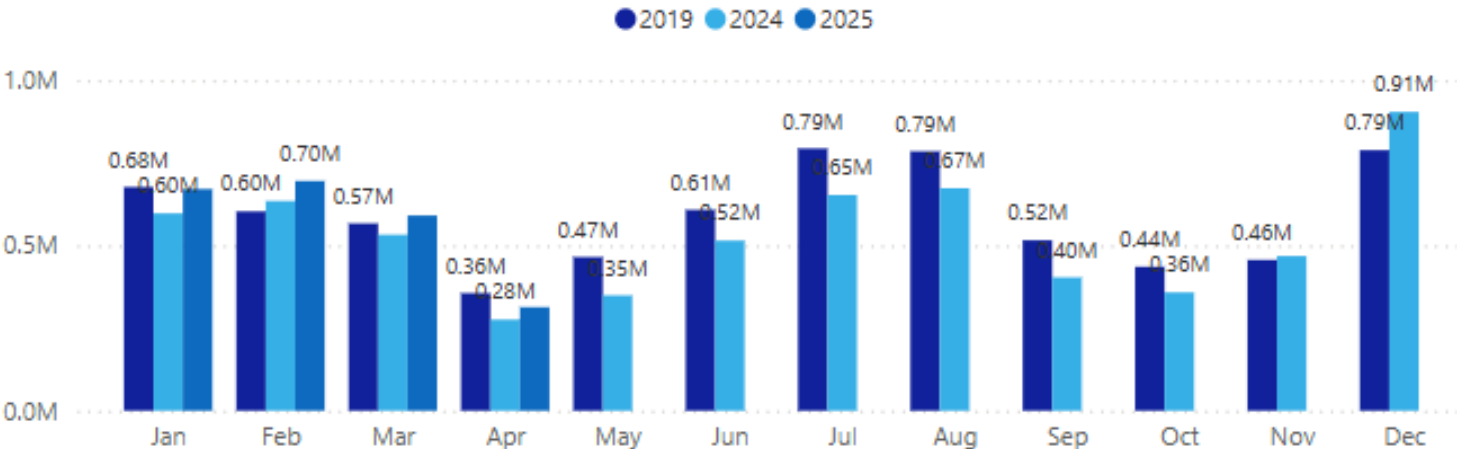
- **148,300 Helsinki**; **+19%**, **(-4%)**
- 30,000 Vantaa, **+10%**, **(+9%)**
- 16,500 Rovaniemi, **+30%**, **(+10%)**
- 14,000 Kittilä-Levi, **+3%**, **(+1%)**
- 11,100 Turku; **+33%**, **(+2%)**

## Top source markets, total foreign; vs. 04/2025

OVERNIGHTS 2025 compared to 2024 months 4-4

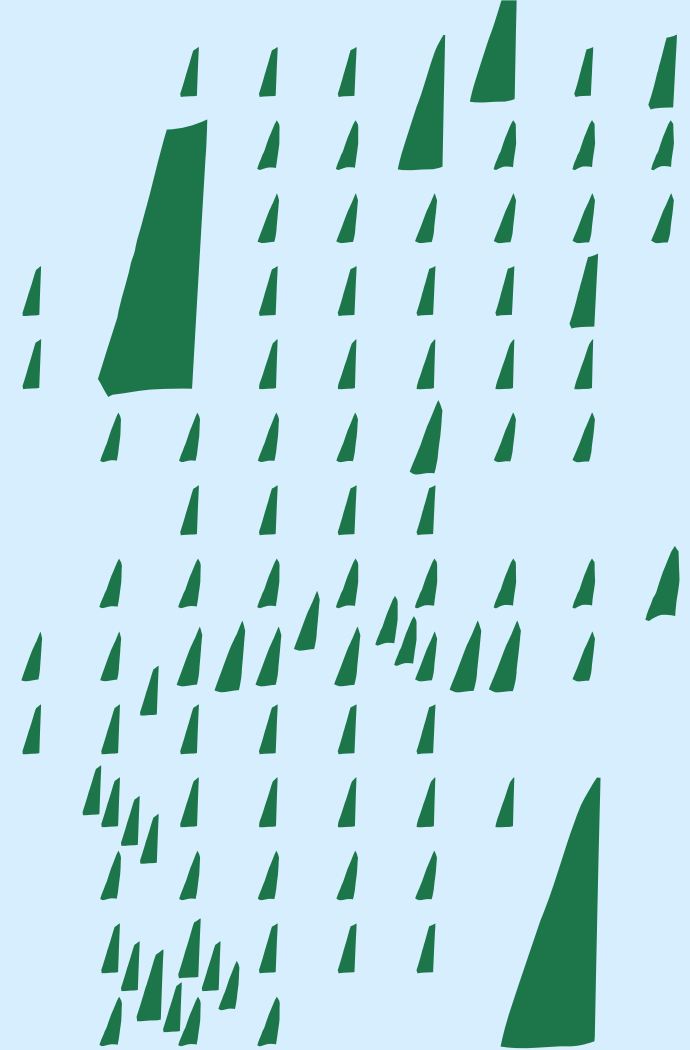


## FOREIGN OVERNIGHTS



# Registered overnights in the Nordics

- Jan-Apr 2025
  - There were **10.6 million** registered foreign overnight stays in the Nordics excluding Iceland (where currently the accommodation statistics are undergoing revisions). Overnights **increased by 10%** compared to the same period last year.
  - **Finland's market share** among the four countries was **21%**.
  - Relative growth during Jan-Apr 2025 was strongest to **Norway** and **Finland**.





## MONTHLY TREND



Year

Latest

Year/Month

All

Nordic country

All

Nordic region

WHOLE COUNTRY

Foreign / Domes...

Foreign

Country

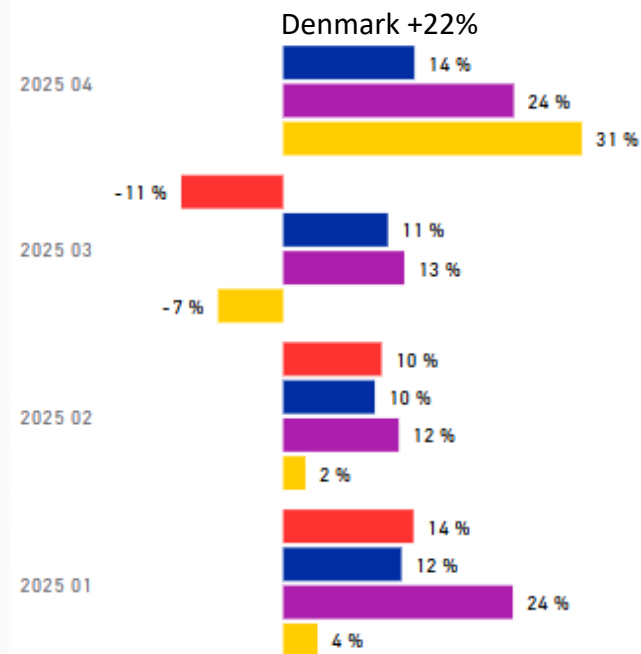
All



## YoY change %

WHOLE COUNTRY Foreign 1.1.2025-30.4.2025

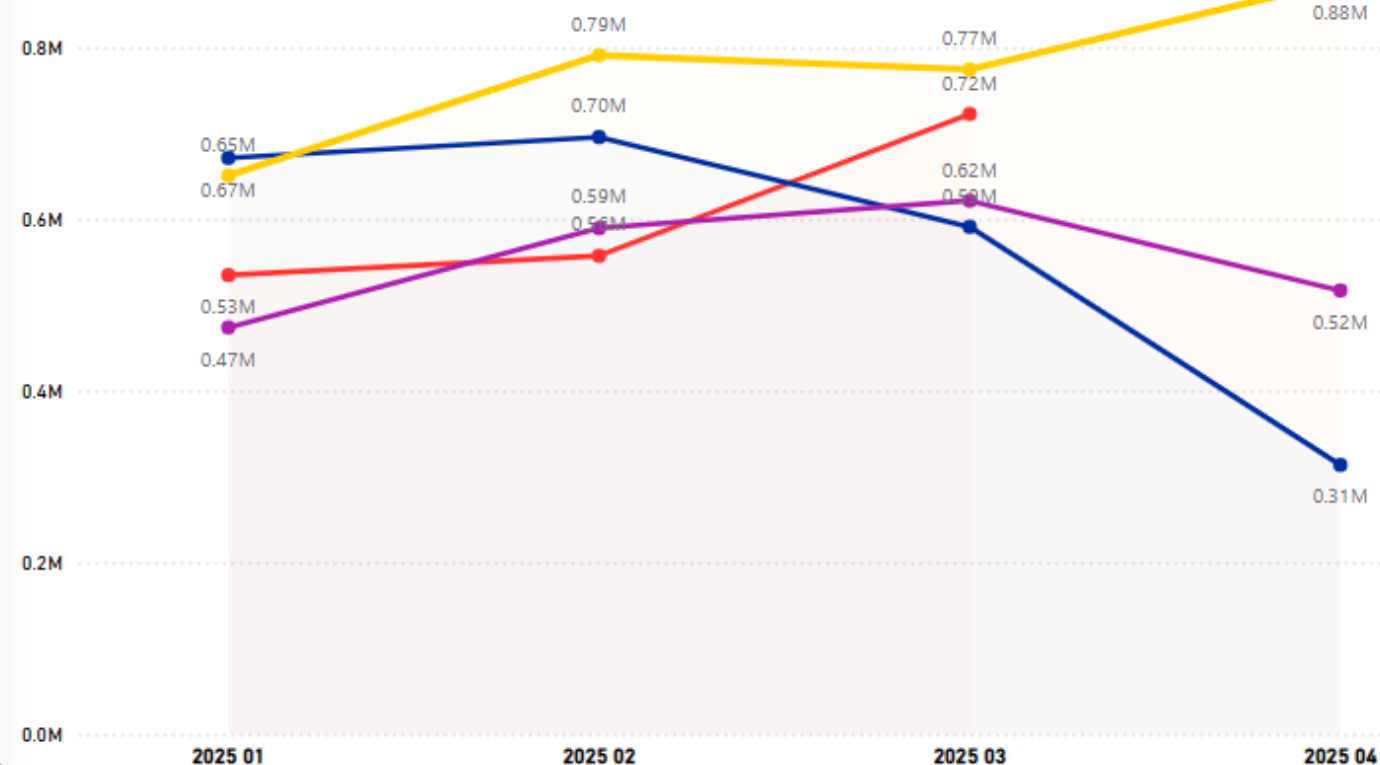
● Denmark ● Finland ● Norway ● Sweden



## Monthly overnights

WHOLE COUNTRY Foreign 1.1.2025-30.4.2025

● Denmark ● Finland ● Norway ● Sweden

Denmark  
1.23M

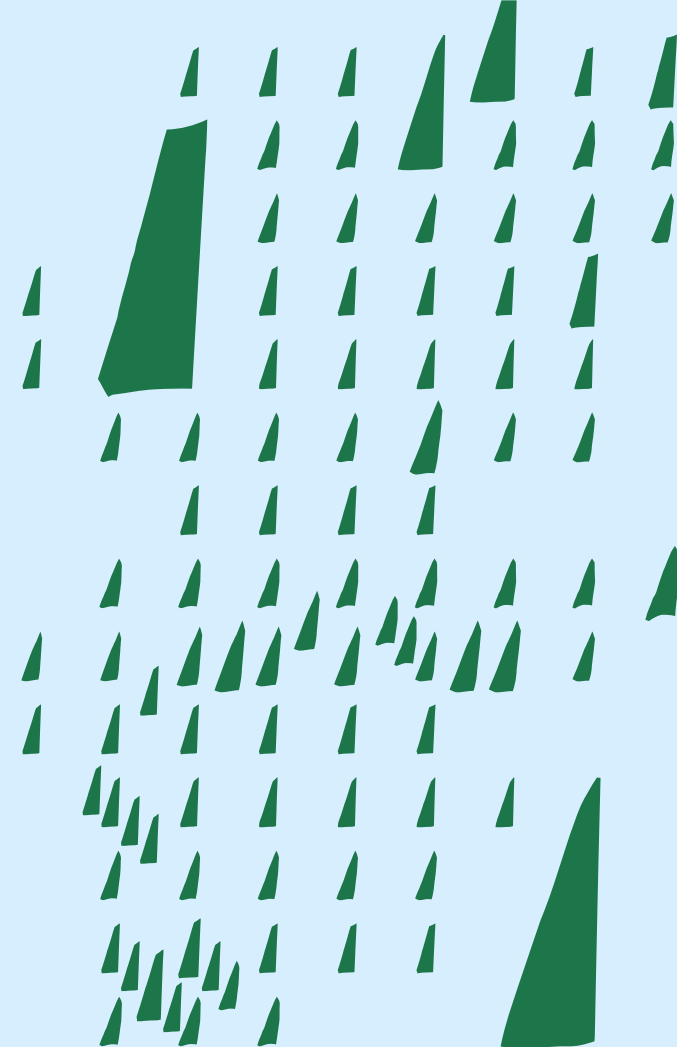
The Nordic region has experienced positive growth in registered foreign overnight stays from January to April 2025.

In April, the count of foreign overnight stays in the four Nordic countries increased when compared to the same month in the previous year.



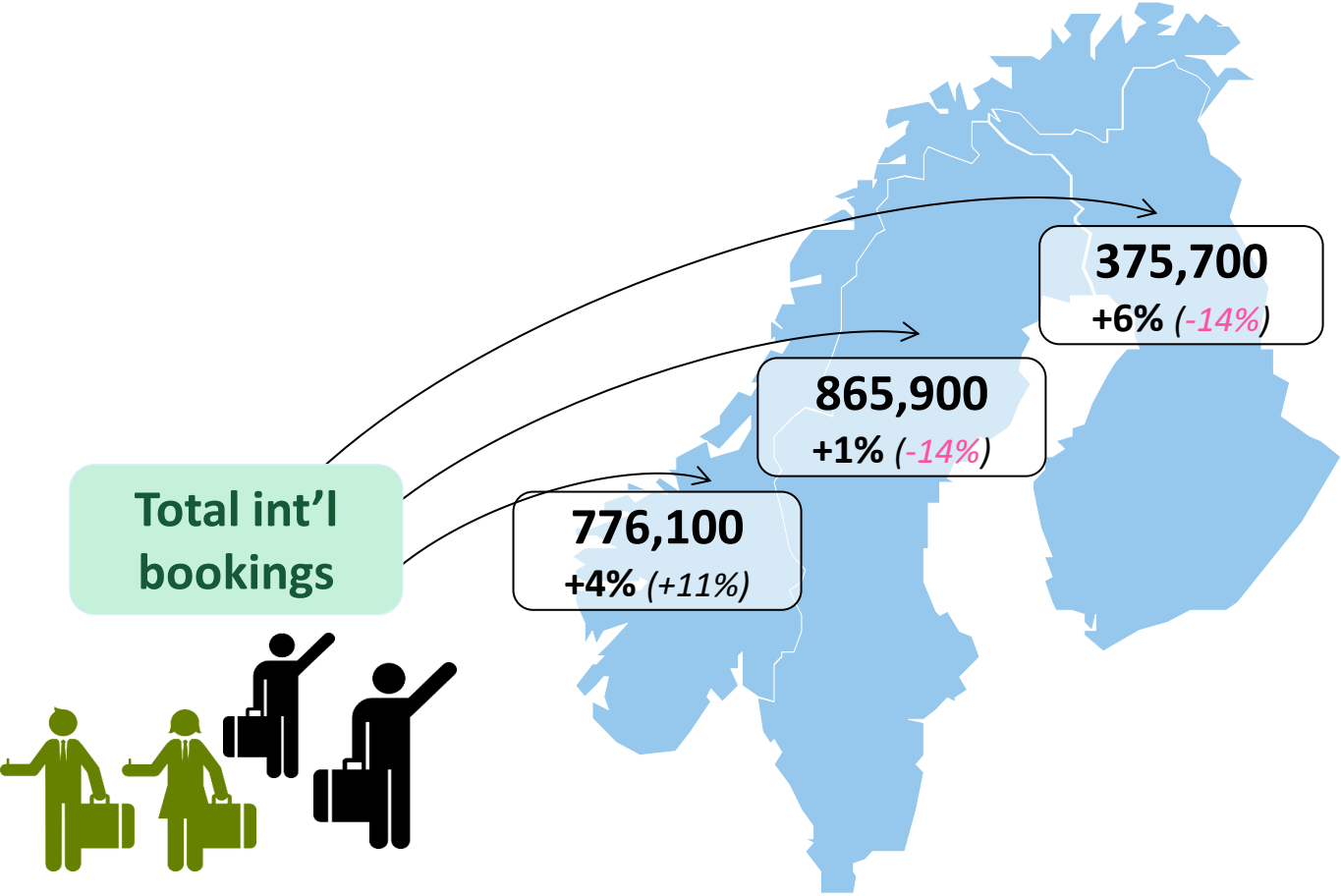
# Flight bookings for Jun-Aug 2025

- Airline bookings to Finland for the **summer months** of June – August are **increasing by 6%** compared to last year. *When comparing to summer 2019, the total int'l bookings are 14% below that level. However, among the main source markets **USA, France, 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 summer as well as to summer 2019. Bookings to **Sweden** are slightly increasing compared to previous summer, but clearly decreasing compared to summer pre-pandemic.



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

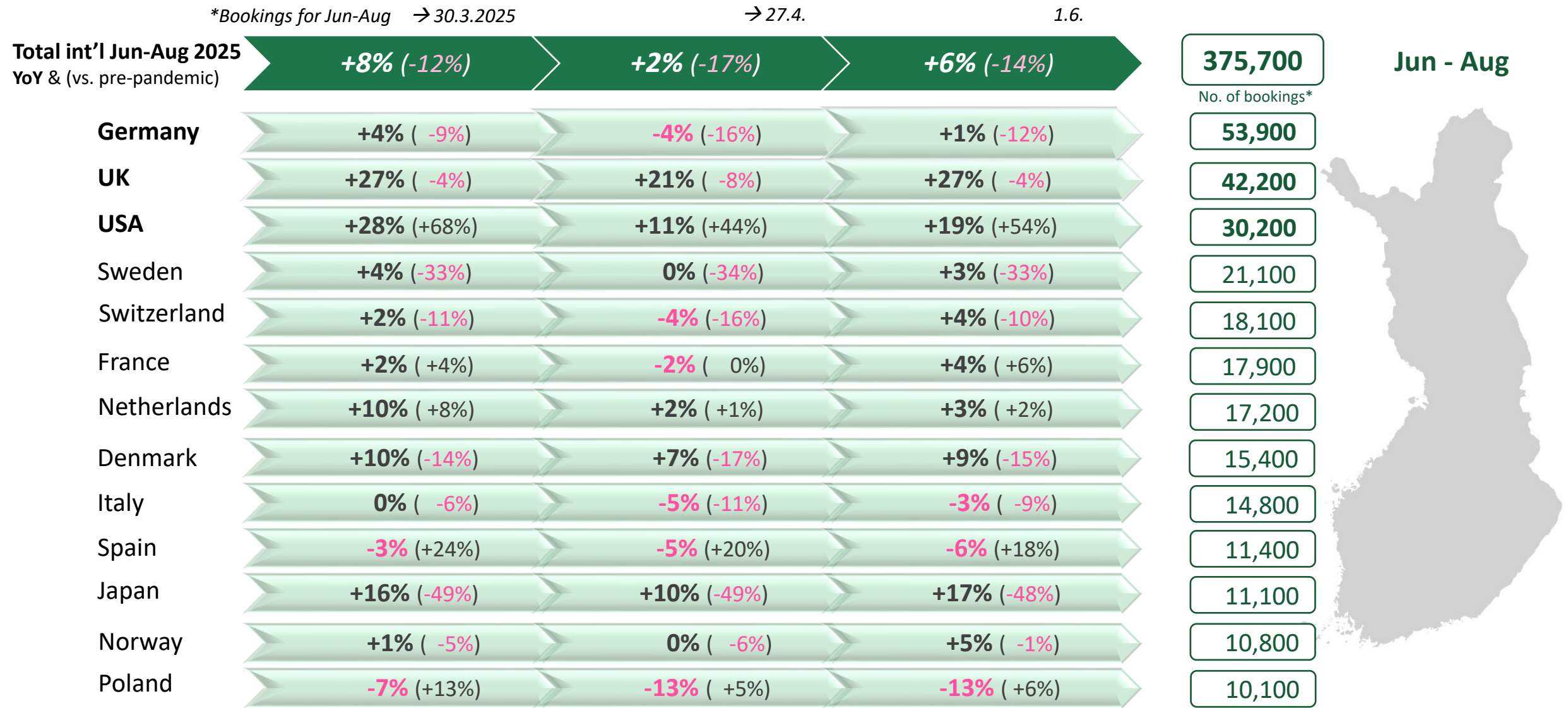
Comparison to previous summer and pre-pandemic



Database update 01-Jun

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

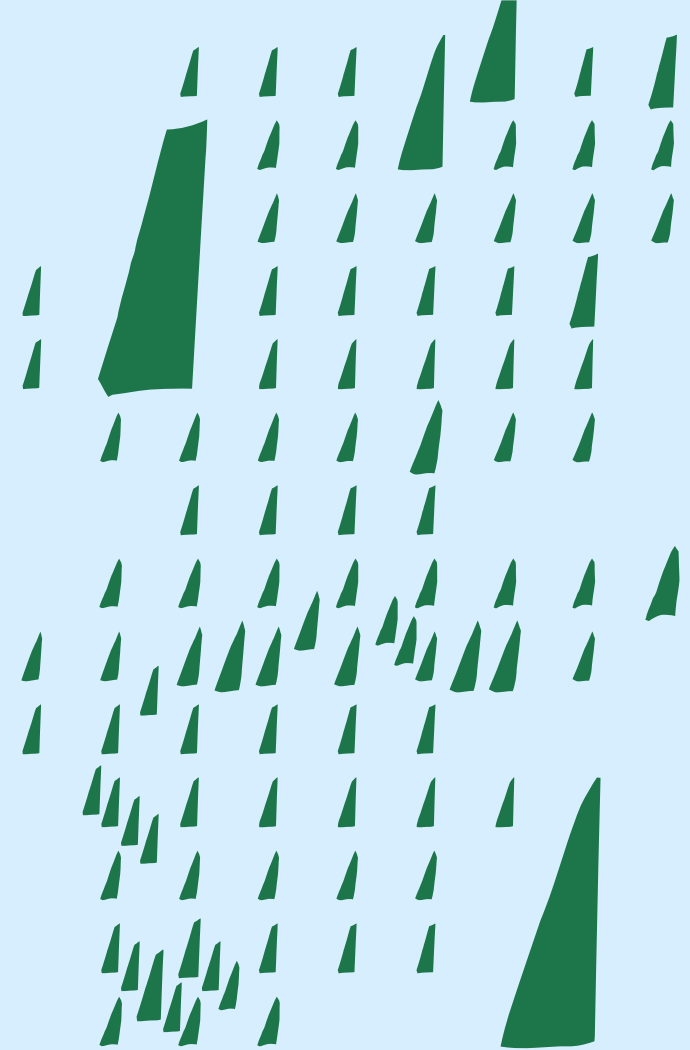
compared to previous year & (pre-pandemic)



# Seat capacity on int'l flights

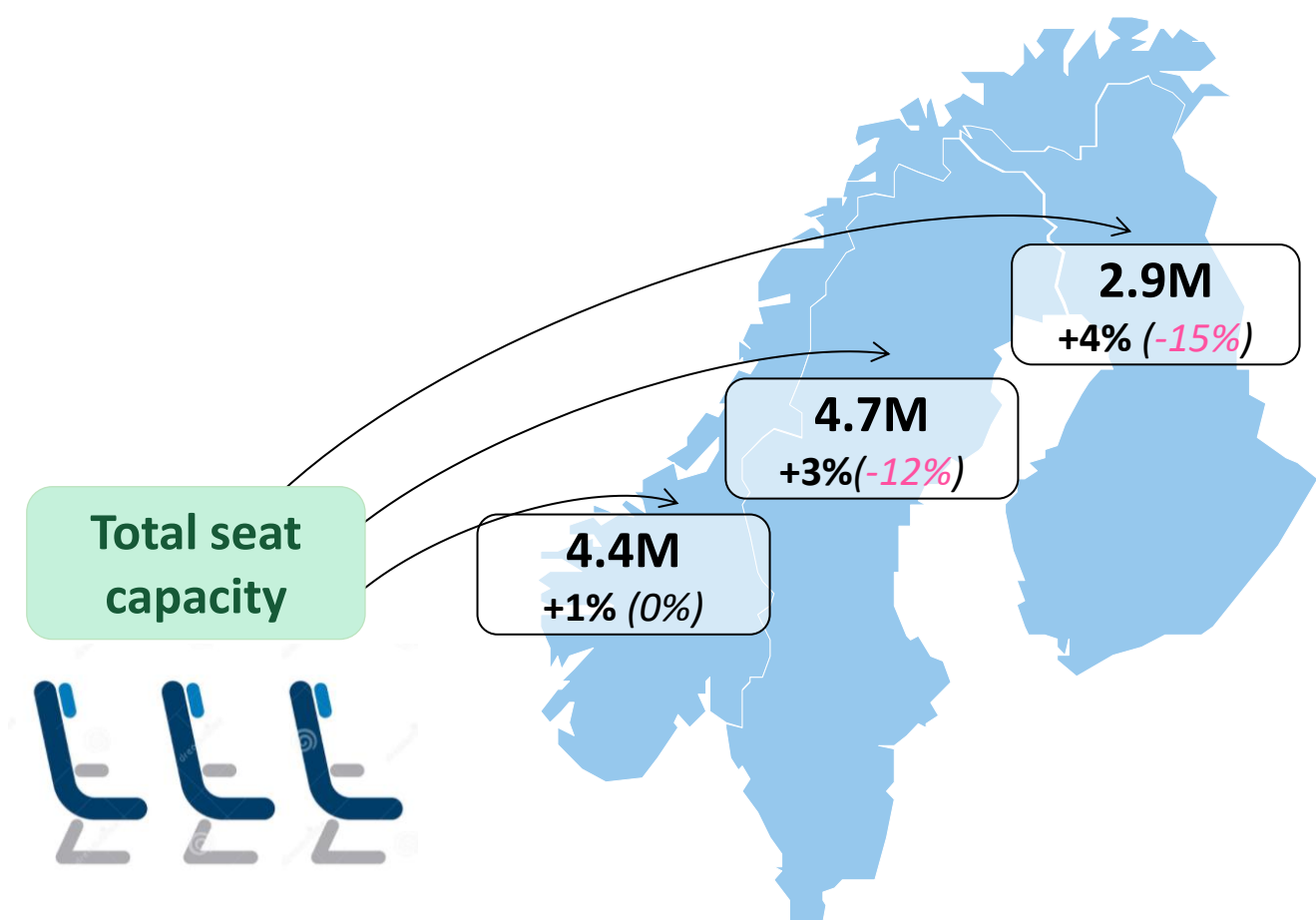
June – August 2025

- **Total int'l seat capacity** for the **summer months** of June – August is **4% above 2024 level**, *but still -15% 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

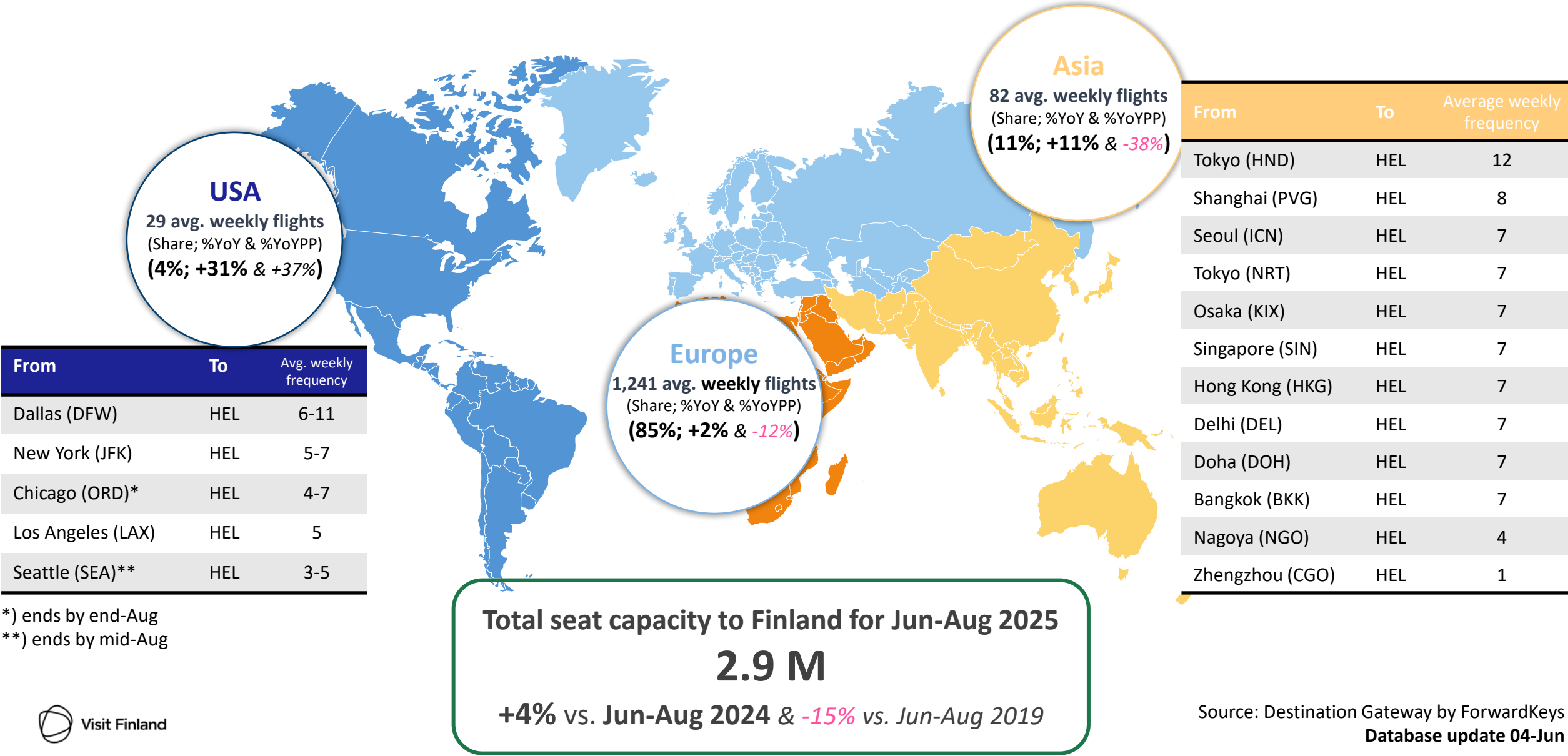
Comparison to previous summer and pre-pandemic



Database update 04-Jun

# Direct int'l flights to Finland Jun-Aug 2025

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



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



# EUROPE to Finland / Jun – Aug 2025

From (selected countries)	Share	Seat capacity compared to 2024	Seat capacity compared to 2019
Germany	12%	-1%	-16%
Sweden	10%	-3%	-24%
UK	8%	+26%	-13%
Spain	7%	-5%	-21%
Italy	6%	-5%	+24%
Greece	6%	-4%	+14%
Denmark	6%	+7%	-16%
Latvia	5%	+17%	+50%
France	5%	0%	-5%
Netherlands	4%	+1%	+2%
Poland	4%	-10%	-3%
Norway	4%	-3%	-16%
Turkiye	4%	+15%	+31%
Estonia	3%	+3%	+34%
Switzerland	2%	-2%	-4%

Top10 airlines operating  
from Europe to Finland

**+1.9%**  
YOY for selected airlines

