



VF monthly follow up

May and spring season 2024

Summary

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

Border survey latest 12 months (Jun-May) & spring (Mar-May)

- Foreign visitors made **4.8 million trips** to Finland during the **latest 12 months** (June 2023 – May 2024) and they **spent nearly 4.0 billion euros in Finland**. **Median length of stay** was **4 nights** and **73%** of the visitors were travelling for **leisure purposes**.
 - **During spring months of March-May 2024, vacation/recreation travellers made 17,000 more trips to Finland** than during the previous spring. They **spent more** and visited **more often destinations in Lapland**, and they also had **more experiences and took part in more activities** than year before.

Registered overnights (Jan-May) and spring (Mar-May)

- Number of registered **foreign overnights** in **Jan-May 2024** were **9% above** the figures of previous year, but still *10% below pre-pandemic*.
- During the **spring season** (Mar-May), foreign registered overnights **increased by 5%** compared to previous spring but stayed *16% below the numbers of 2019*. Nearly half of the spring overnights took place in March, so many destinations in **Lapland** were among the most visited destinations beside the bigger cities in the Southern Finland.
- Comparison with **the other Nordic countries** shows that Finland is the only Nordic country where overnights during the **spring season** have not reached the pre-pandemic level yet.

Flight capacity and bookings for summer season (Jun-Aug)

- Flight **capacity** as well as **bookings** for the **summer season** have **increased to Finland, Sweden, and Norway** compared to the **previous summer**. However, **Norway** is the only one of these neighbouring countries which **has also reached the pre-pandemic level**.

Border Survey / Latest 12 months (June 2023 – May 2024)

Foreign visitors in Finland

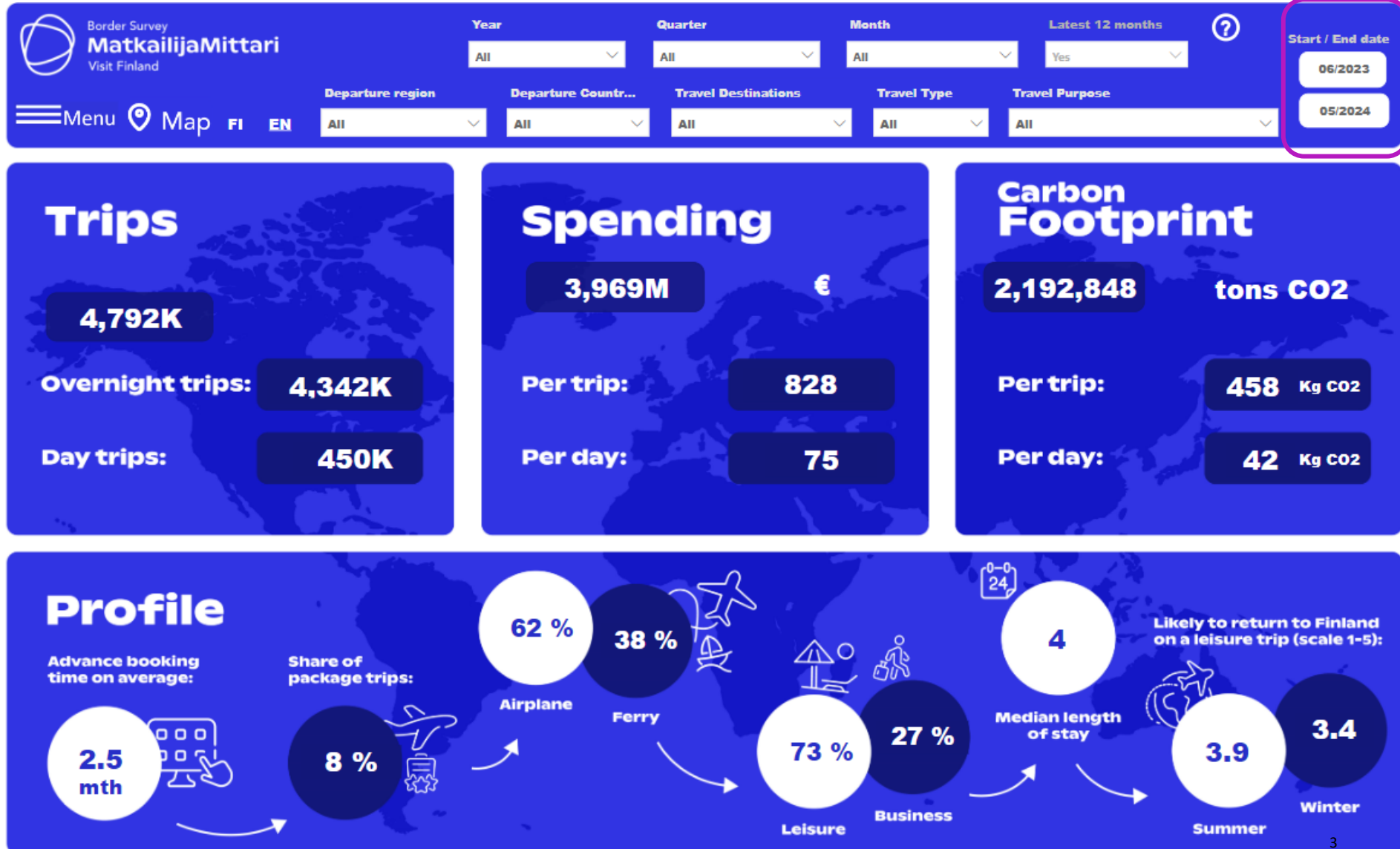
[Link to the report:](#)
[Matkailijamittari - Visit Finland](#)

Personal/leisure trips 3,455K

- 61% vacation/recreation
- 32% visiting friends/relatives
- 3% study

Work related trips 1,294K

- 34% work performed in FI (for a Finnish employer)
- 29% meeting/work trip (non-Finnish employer)
- 16% conference, congress, fair

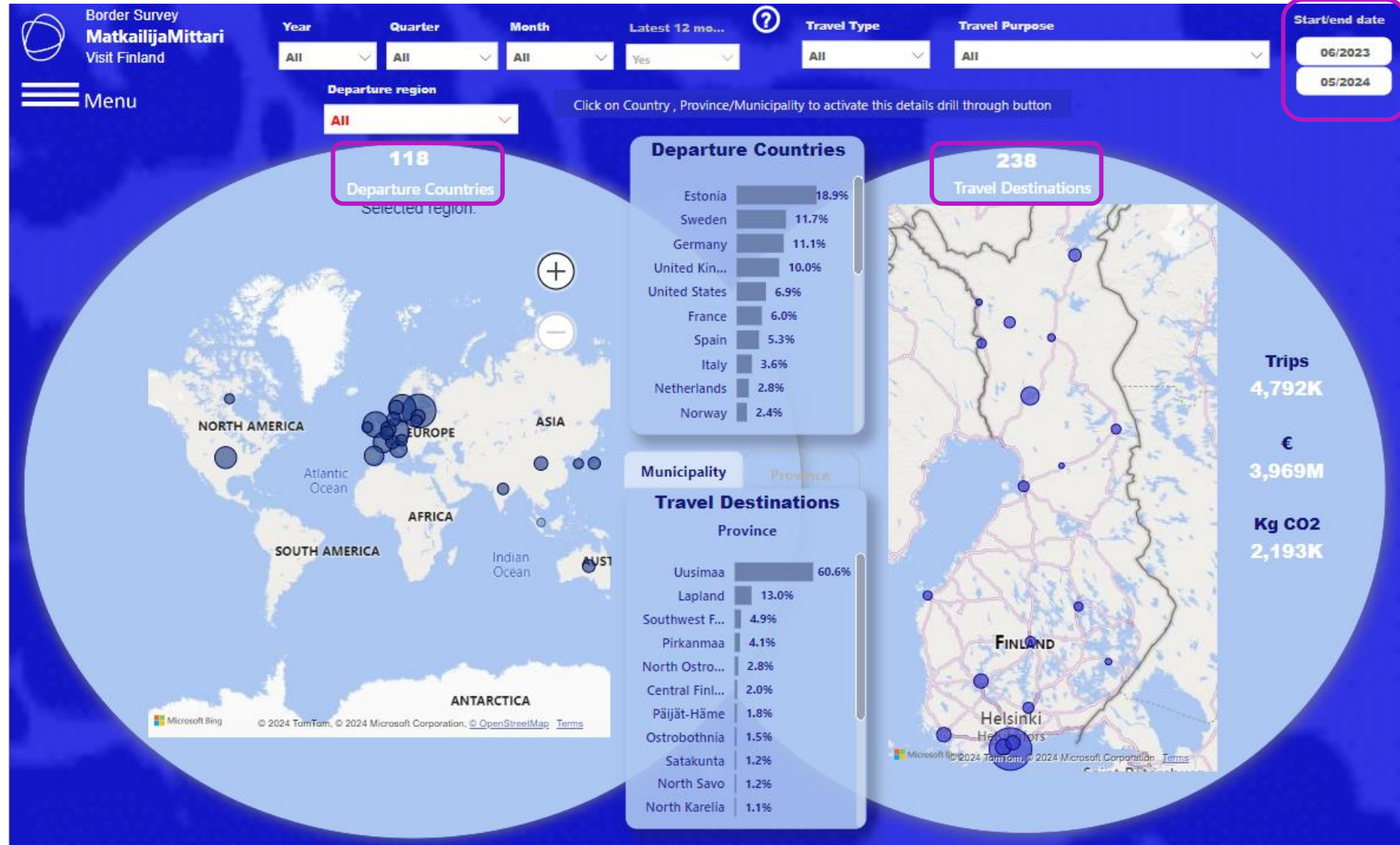


Border Survey / Latest 12 months (June 2023 – May 2024)

Foreign visitors in Finland

[Link to the report:](#)

[Matkailijamittari - Visit Finland](#)



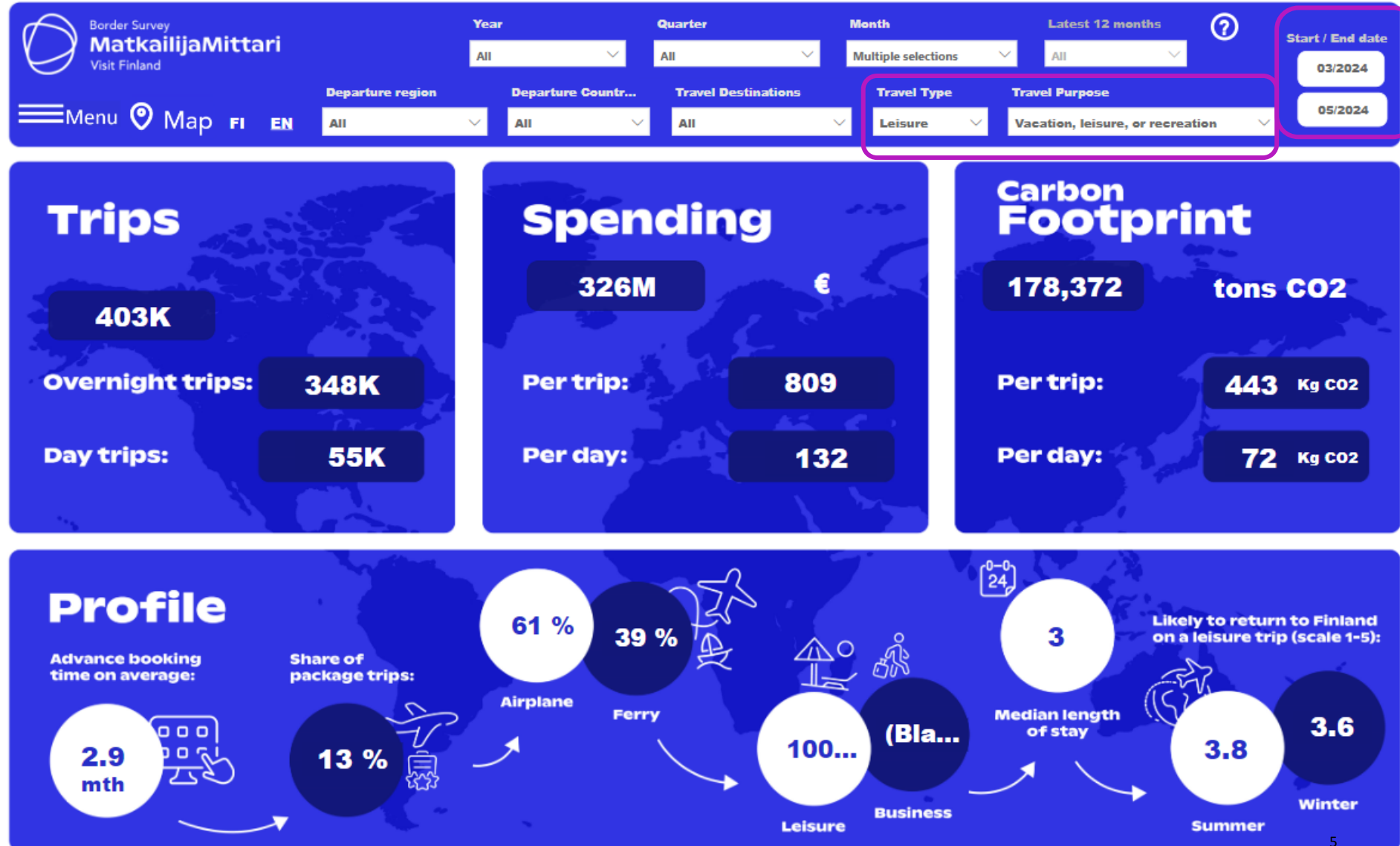
Vacation/recreation travellers – Spring 2024

Border survey, March – May 2024

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

- During the spring months of March-May 2024, travellers on vacation/recreation reserved their trips to Finland nearly 3 months before their trip, share of package trips was 13%, and the median length of stay was 3 nights. The average spend per trip was 809€ and per day 132€.

- During the previous spring in 2023, vacation/recreation trips were reserved slightly later (2.5 months) before the trip, and the share of package trips was slightly lower (12%). Median length of stay was the same as this spring. Spend per trip as well per day were clearly lower last spring (698€ / 92€).



Vacation/recreation travellers with paid accommodation – spring 2024 vs. spring 2023

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

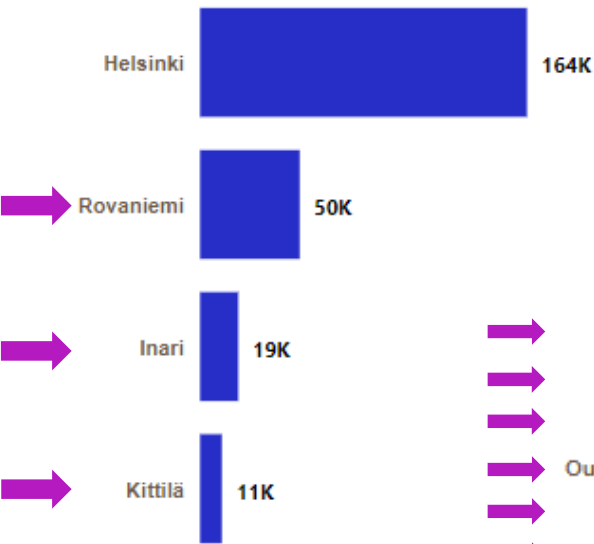
Spring 2024



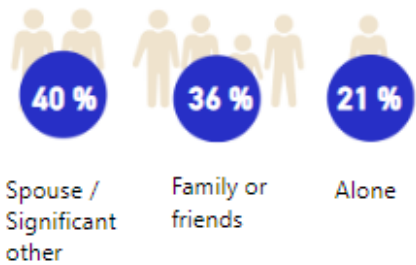
Trips
→ **298K**

Median length of stay
4

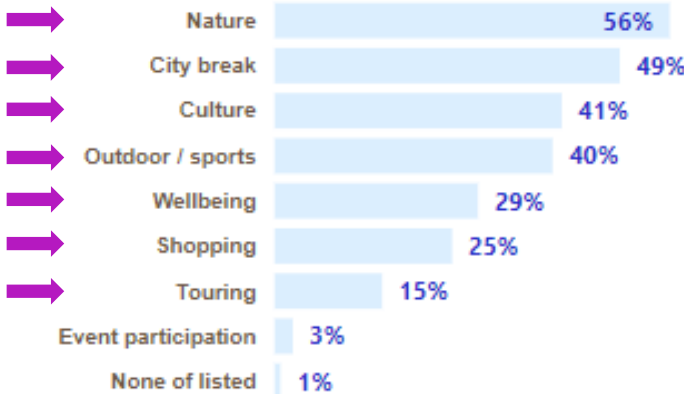
**Most visited destinations
(municipalities)**



Travelling with



Experiences & attractions



Respondent can select max 3 options

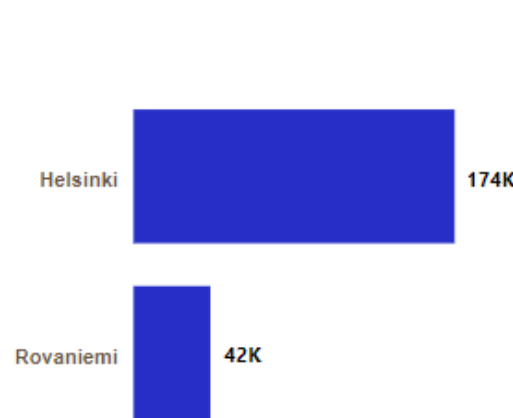
Spring 2023



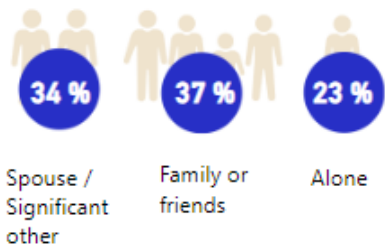
Trips
281K

Median length of stay
4

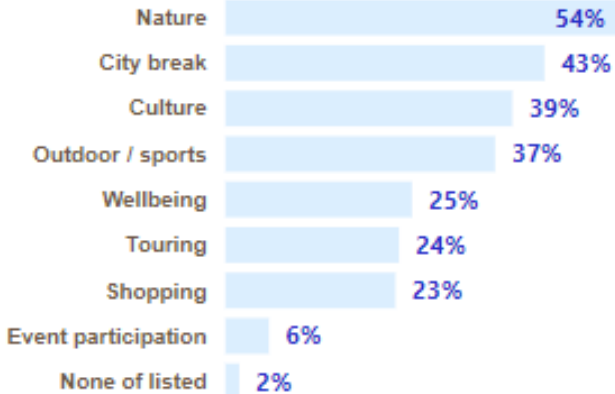
**Most visited destinations
(municipalities)**



Travelling with



Experiences & attractions

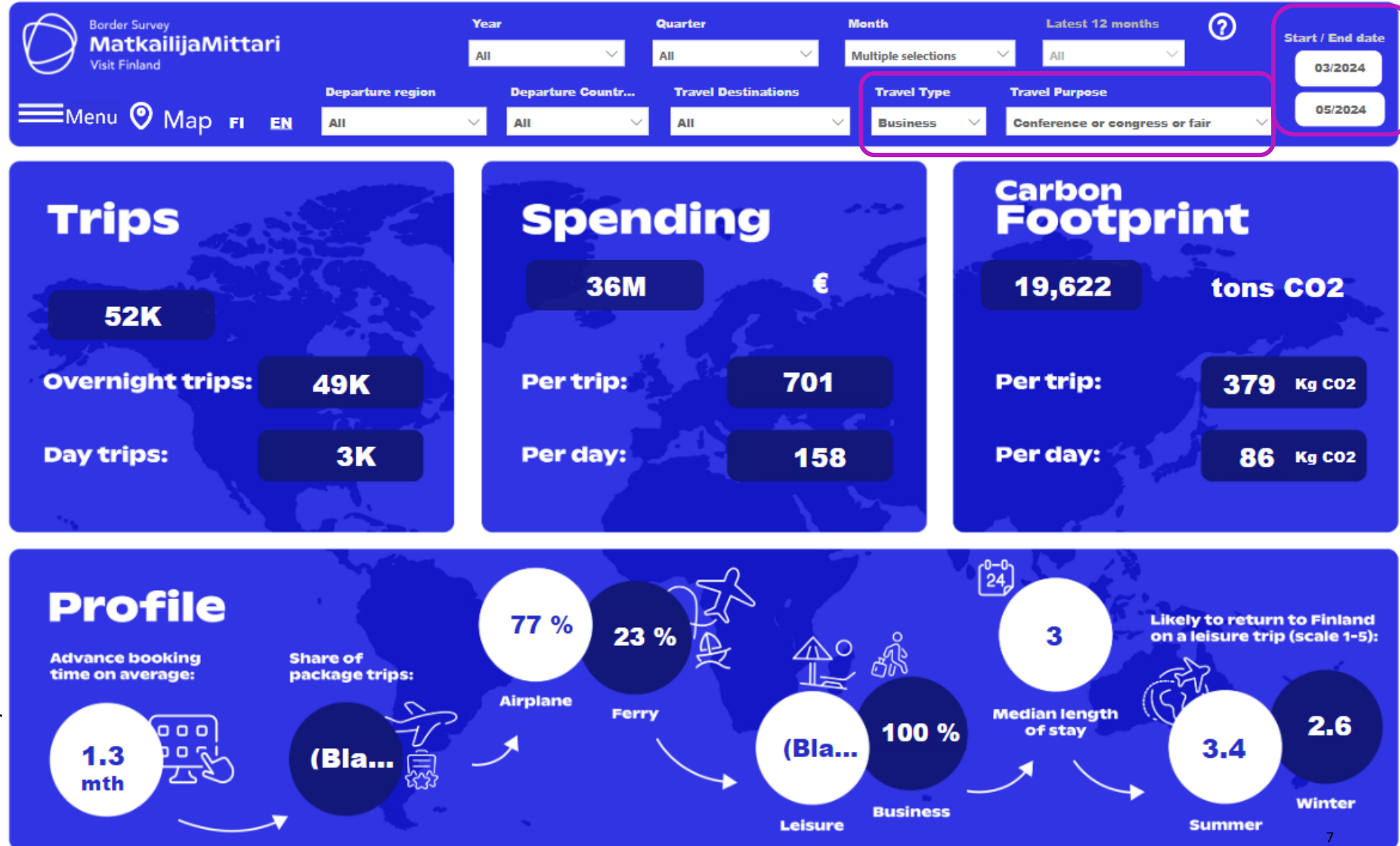


Respondent can select max 3 options

Conference, congress & fair participants – Spring 2024

Border survey, March – May 2024

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



- During the spring months of March-May 2024, **business events travellers** reserved their trips to Finland **1.3 months before their trip**, and the median length of stay was **3 nights**. The **average spend** per trip was **701€** and per day **158€**.
- During the previous spring in 2023, trips to business events were reserved earlier (1.8 months) before the trip. Median length of stay was the same as this spring. Spend per trip was slightly higher (728€) last spring but on the other hand spend per day was lower (133€).

Conference, congress & fair participants – spring 2024 vs. spring 2023

Spring 2024



Trips
52K

Travelling with



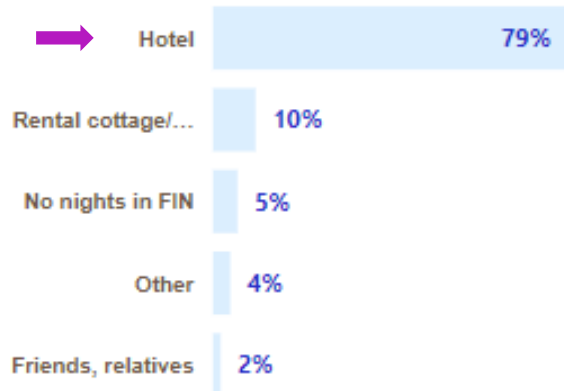
Spouse / Significant other
Family or friends
Alone

* Categories Other and Not filled in are not displayed in this Travelling with visual

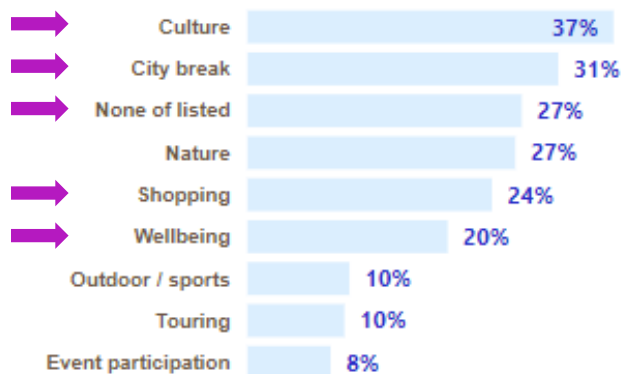
Most visited destinations (municipalities)

Helsinki 31K

Accommodation



Experiences & attractions



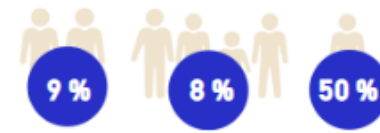
Respondent can select max 3 options

Spring 2023



Trips
54K

Travelling with



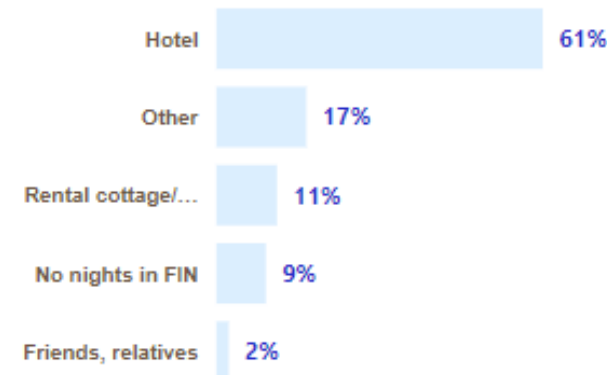
Spouse / Significant other
Family or friends
Alone

* Categories Other and Not filled in are not displayed in this Travelling with visual

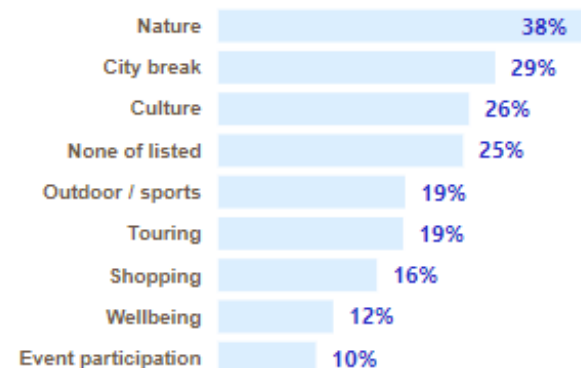
Most visited destinations (municipalities)

Helsinki 34K

Accommodation



Experiences & attractions

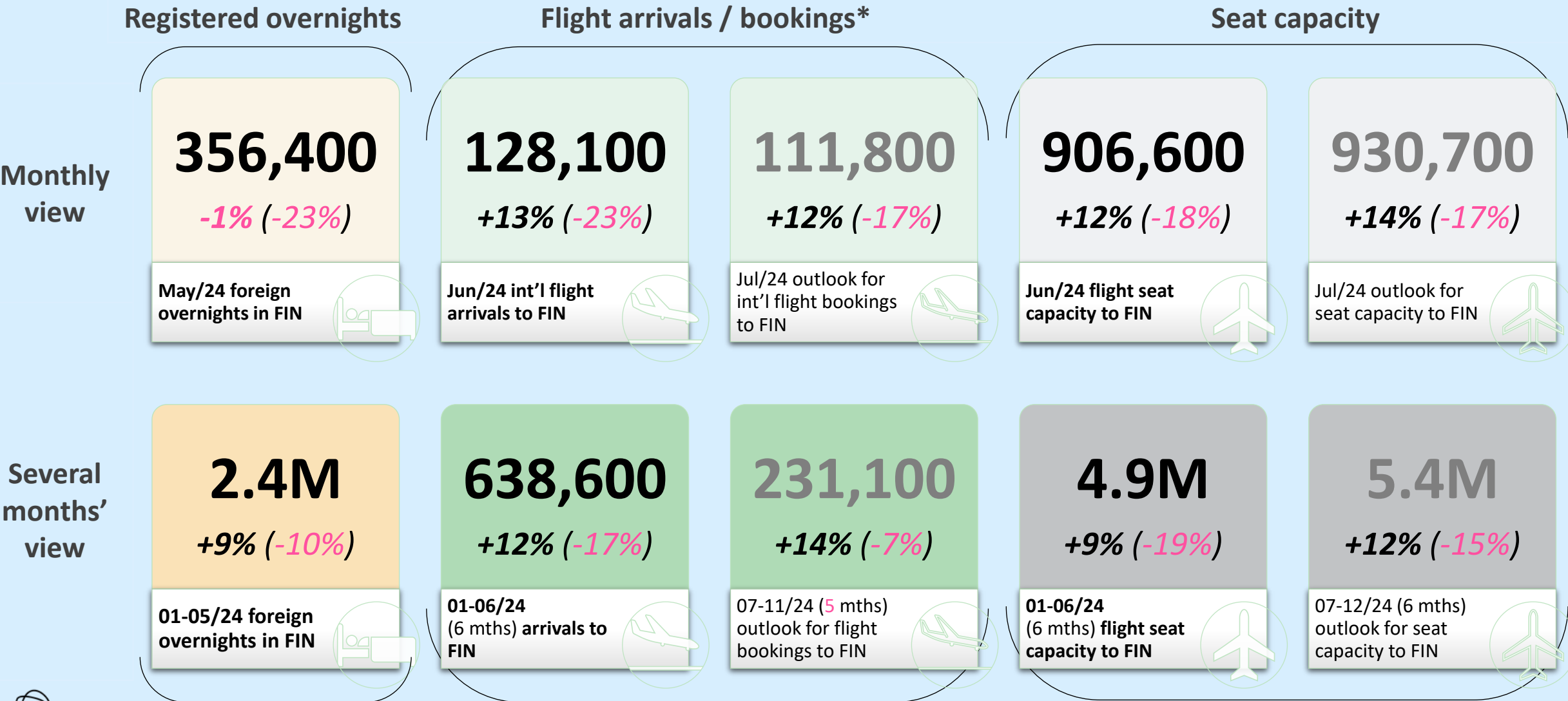


Respondent can select max 3 options

Foreign registered overnights & flight statistics

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

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



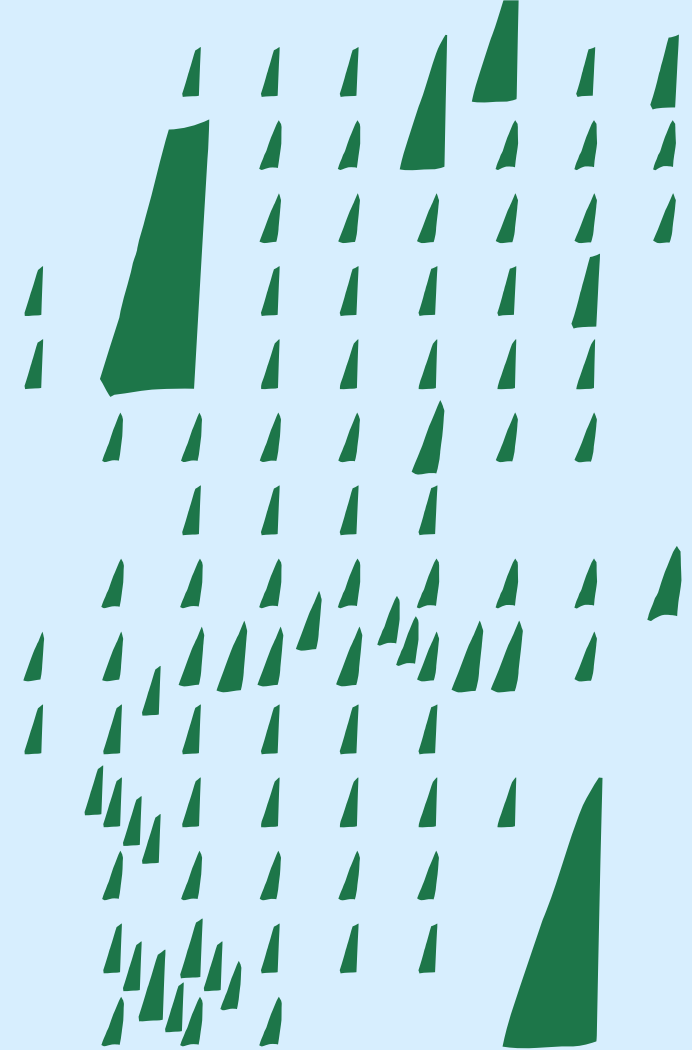
Registered overnights

- January – May 2024

- Foreign overnights increased by **9%** compared to previous year but remained 10% below the numbers of 2019. The biggest source markets were **Germany, France, UK, and the Netherlands**.
- Total accommodation revenue increased by **2%** as the foreign revenue increased by **14%** compared to Jan-May 2023 (domestic revenue -4%).

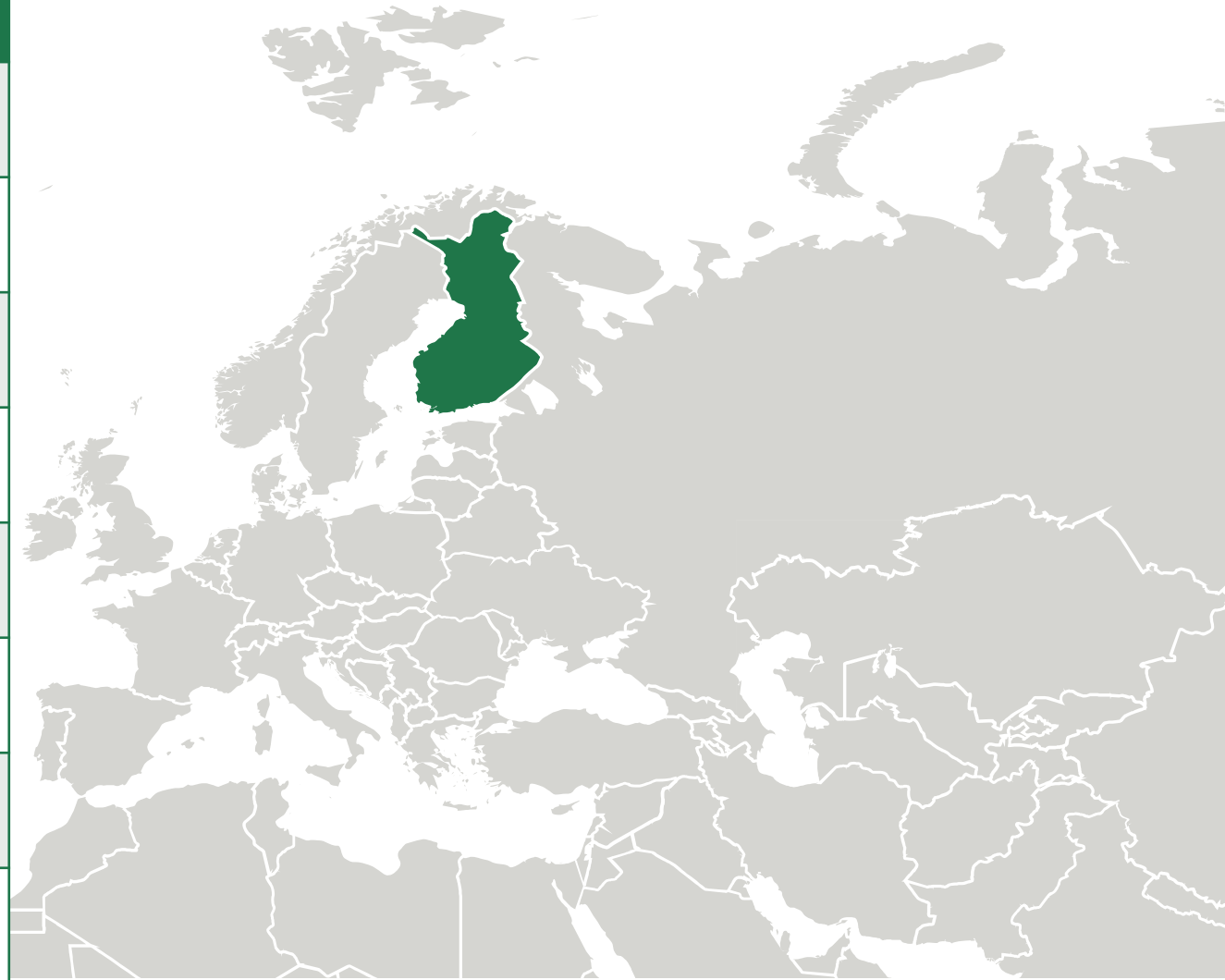
- Spring season (Mar-May/2024)

- Foreign overnights: **1.2 M** (+5% vs. spring 2023 & -16% vs. spring 2019)
- Foreign excl. Russia: **2.0 M** (+6% vs. spring 2023 & -5% vs. spring 2019)
- **Nearly half** of the spring overnights took place in **March** and the overnights were clearly closest to pre-pandemic levels (-6%). April and May overnights stayed **23% below** the numbers of 2019.
- Top source markets: **Germany, Sweden, USA, France, UK, the Netherlands**
- Main destinations:
Helsinki, Rovaniemi, Vantaa, Inari-Saariselkä, Kittilä-Levi, Tampere, Espoo, Kolari-Ylläs, Turku



Registered overnights Jan-May 2024

	Jan-May 2024	Change-% vs. Jan-May 2023	Change-% vs. Jan-May 2019
Total	8.3M	0%	0%
Domestic	5.9M	-3%	+5%
Foreign, total	2.4M	+9%	-10%
Foreign excl. Russia	2.4M	+10%	+3%
Scandinavia	256,500	+3%	-9%
EU-27 + UK	1.4M	+6%	+12%
America	185,900	+18%	+25%
Asia	305,300	+32%	-30%

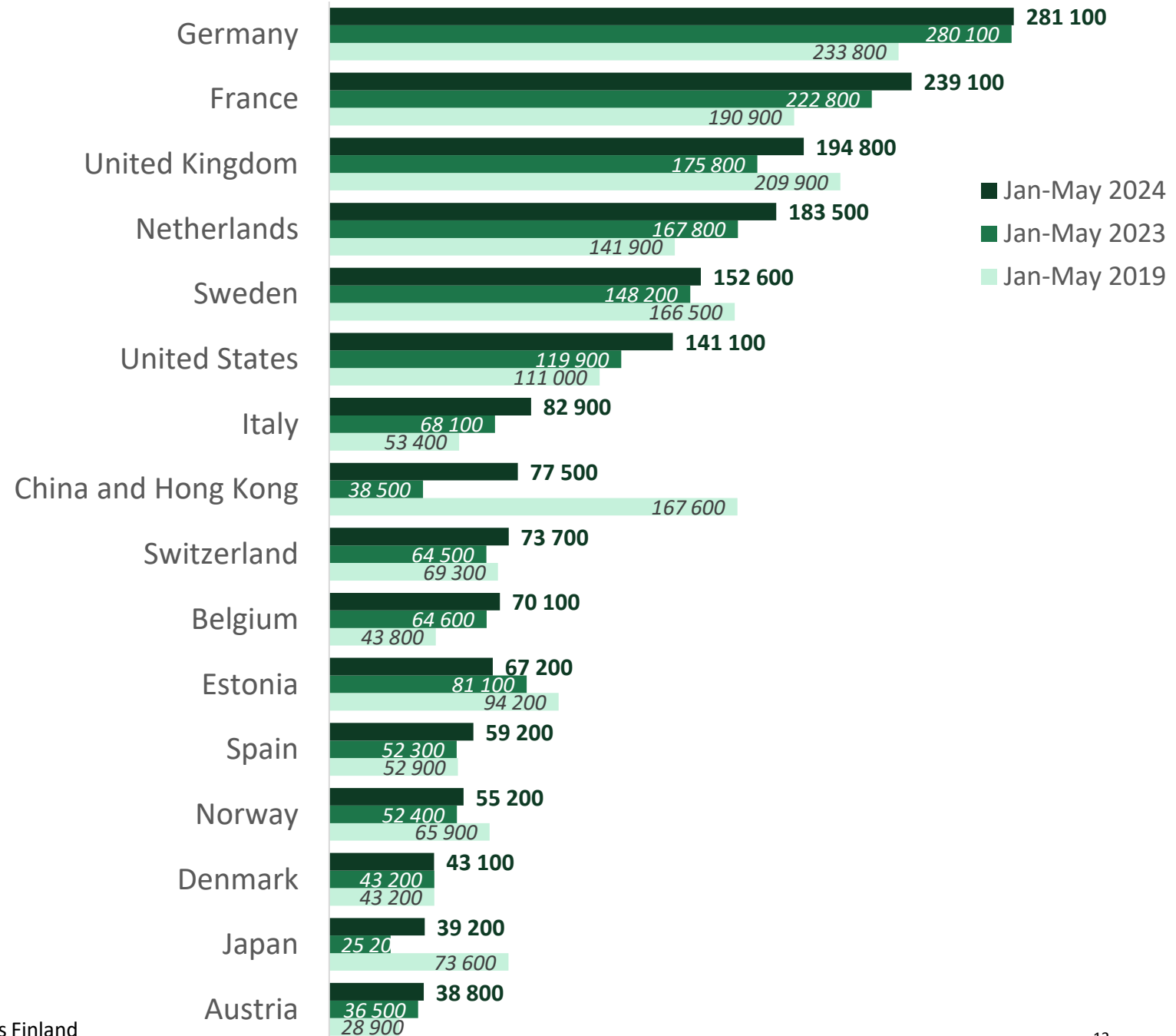


Top16 origin countries

Jan-May 2024 vs. Jan-May 2023 & Jan-May 2019

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

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





Year

2018 2019 2020 2021 2022 2023 Latest

Year month

Jan Feb Mar Apr May

Overnights 8.3M TOTAL overnights	YoY change % 0 YoY change %	Foreign 2.4M Overnights	YoY change % 8.9 Foreign	Domestic 5.9M Overnights	YoY change % -3 Domestic	Revenue 585.7M TOTAL revenue	YoY change % 2 YoY change %
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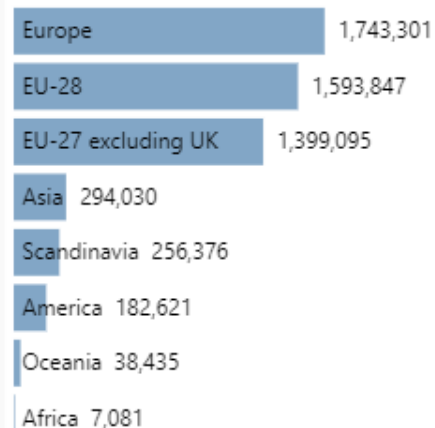
View Main regions, Regions by

Domestic Foreign

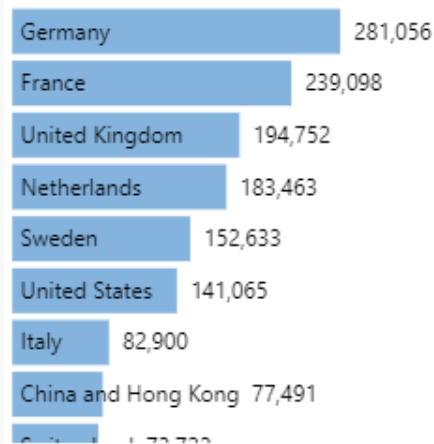
VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

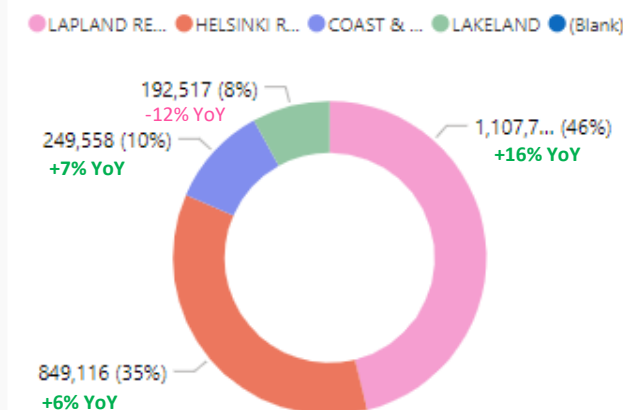
OVERNIGHTS FOREIGN REGION 2024,
202401-202405



OVERNIGHTS BY COUNTRY YEAR 2024,
202401-202405



OVERNIGHTS IN MAIN REGIONS YEAR 2024, 202401-202405



REGIONAL OVERNIGHTS



Sources: Statistics Service Rudolf, Statistics Finland

REVENUE 2024





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

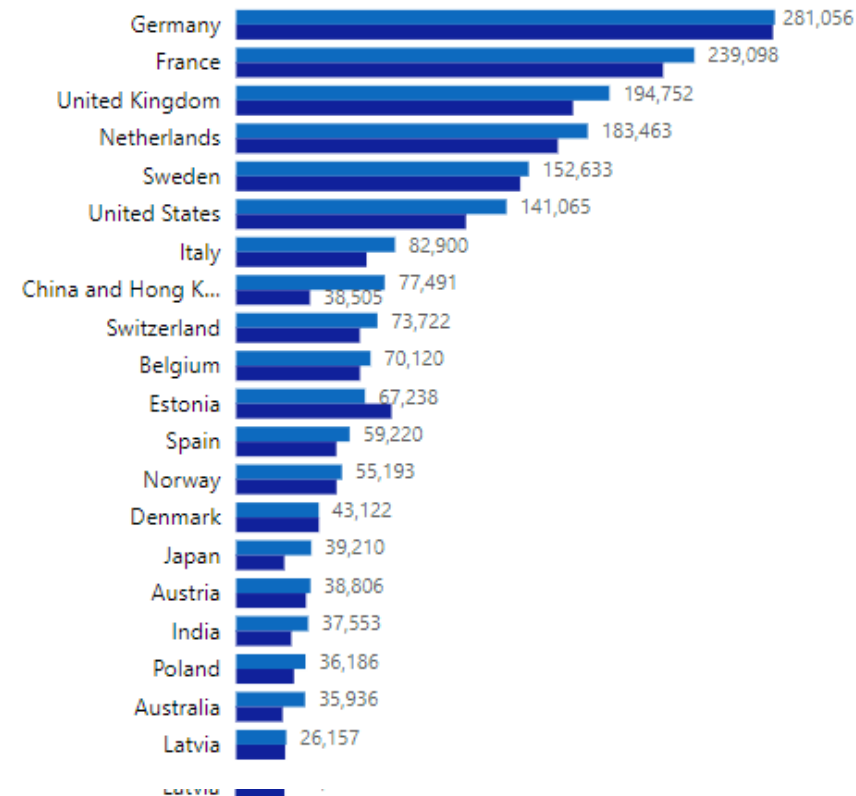


FOREIGN OVERNIGHTS 2024 compared to 2023 months 1-5

Main area	2024 MAX year	2023 MIN year	Change %
LAPLAND REGION	1,107,710	952,504	16.3
HELSINKI REGION	849,116	798,639	6.3
COAST & ARCHIPELAGO	249,558	233,331	7.0
North Ostrobothnia (excl. Kuusamo)	59,290	53,749	10.3
Southwest Finland	47,736	44,743	6.7
Åland	40,361	37,110	8.8
Uusimaa 2 (excl. Helsinki Metropolitan Area)	34,741	31,576	10.0
Satakunta	25,566	20,921	22.2
Ostrobothnia	19,685	22,212	-11.4
Kymenlaakso	8,709	8,834	-1.4
South Ostrobothnia	8,674	8,723	-0.6
Central Ostrobothnia	4,796	5,463	-12.2
LAKELAND	192,517	217,859	-11.6
Pirkanmaa	62,334	77,015	-19.1
Central Finland	39,009	41,357	-5.7
Päijät-Häme	22,491	31,183	-27.9
North Savo	15,039	14,696	2.3
Kainuu	14,487	15,538	-6.8
North Karelia	12,189	10,327	18.0
South Savo	11,509	9,193	25.2
South Karelia	8,740	9,524	-8.2
Kanta-Häme	6,719	9,026	-25.6
Total	2,398,901	2,202,333	8.9

OVERNIGHTS 2024 compared to 2023 months 1-5

● MAX year ● MIN year



The most popular destinations in Finland during Jan-May 2024

(vs. Jan-May 2023):

- Helsinki (+9%)
- Rovaniemi (+11%)
- Inari-Saariselkä (+21%)
- Kittilä-Levi (+13%)
- Vantaa (+4%)
- Kolari-Ylläs (+4%)
- Kuusamo-Ruka (+39%)
- Sodankylä (+30%)

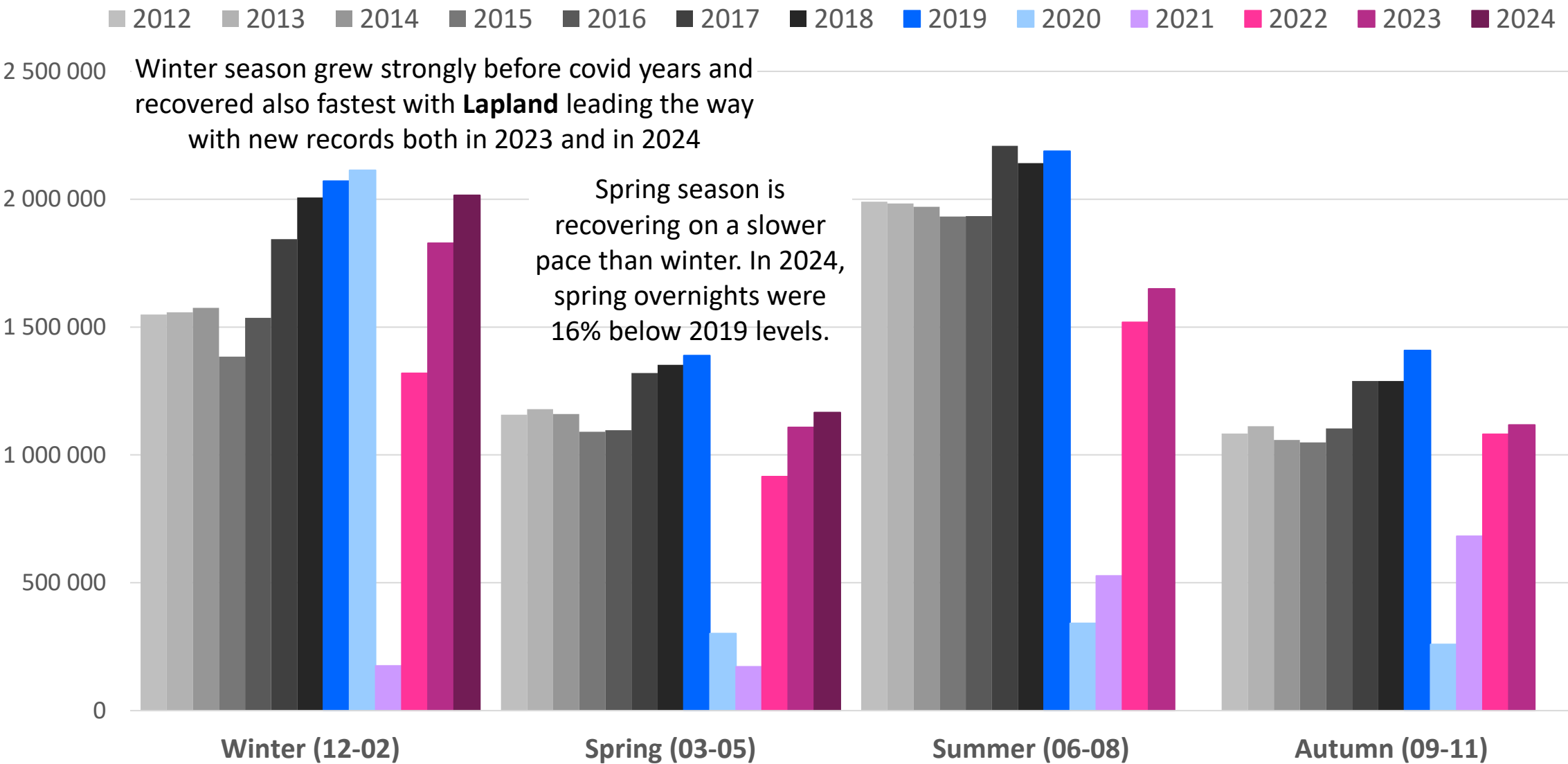
Top destinations in Finland in May 2024

(vs. May 2023):

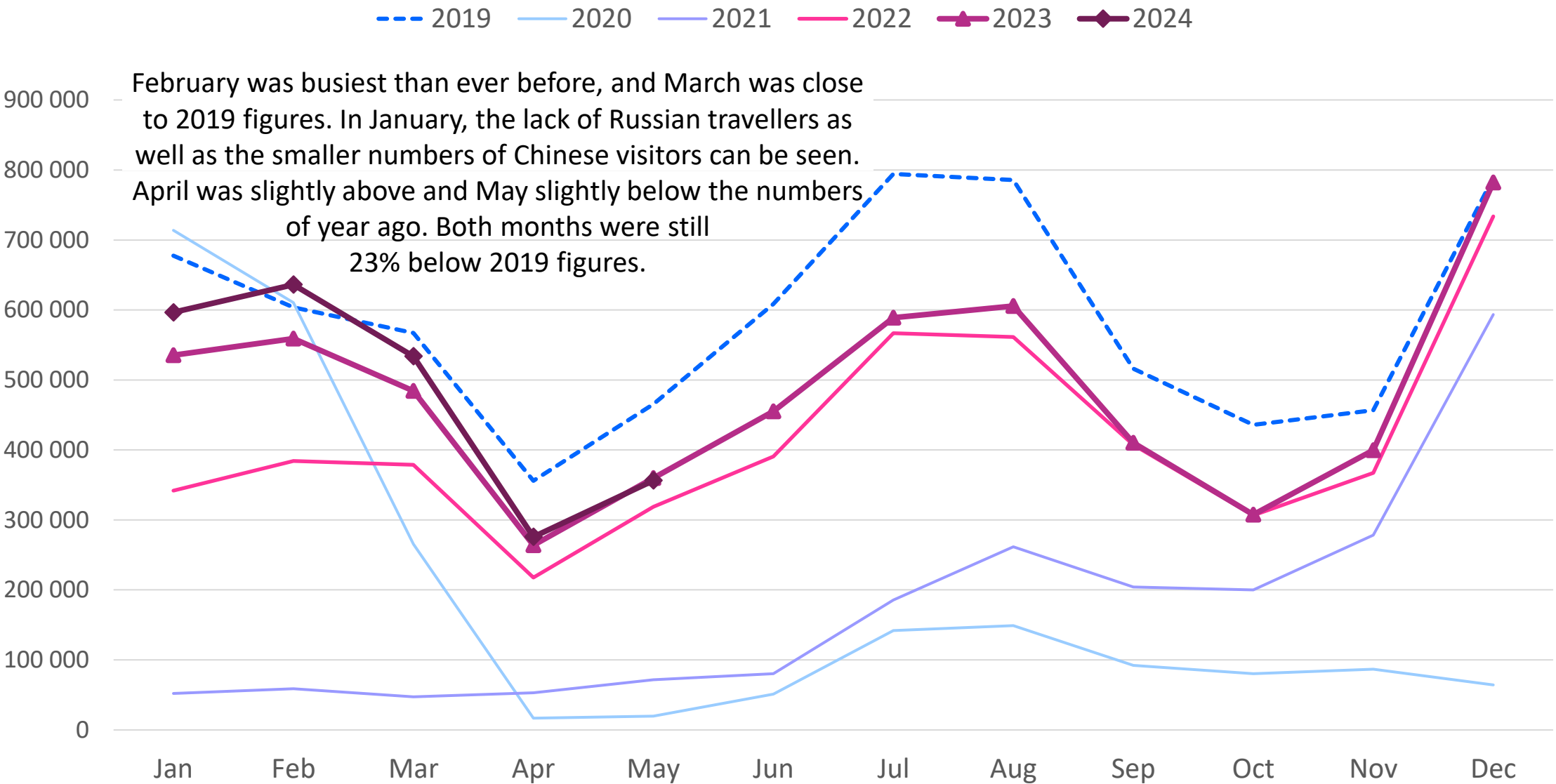
- Helsinki (+3%)
- Vantaa (-7%)
- Espoo (-8%)
- Tampere (-48%)
- Turku (+12%)



Foreign overnights by seasons 2012-2024



Foreign monthly overnights 2019-2024

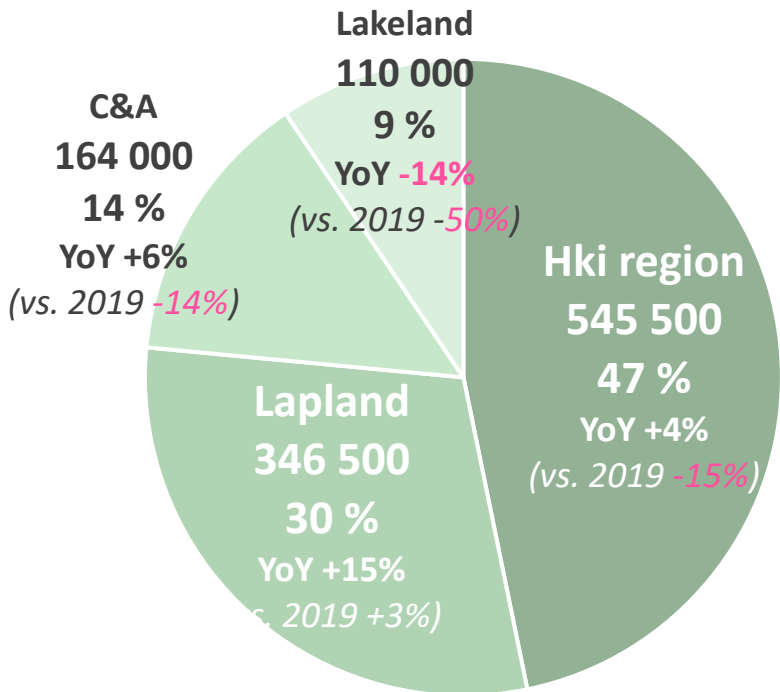


Foreign overnights in spring season 2024

And change compared to springs 2023 & (2019)

1.2M foreign overnights
+5% vs. spring 2023
(-16% vs. spring 2019)

- 739,200** from EU-27 + UK / **+5%** *(+1%)*
- 151,300** from Asia / **+22%** *(-33%)*
- 113,000** from America / **+8%** *(+10%)*



	spring 2019	spring 2023	spring 2024	spring 2024 vs. 2019	spring 2024 vs. 2023
Germany	124 000	141 900	142 200	+15 %	0 %
Sweden	117 000	105 500	110 500	-6 %	+5 %
United States	78 000	80 600	86 400	+11 %	+7 %
France	72 600	71 700	74 600	+3 %	+4 %
United Kingdom	82 300	59 300	63 500	-23 %	+7 %
Netherlands	57 400	60 300	60 800	+6 %	+1 %
Italy	28 600	33 600	42 400	+48 %	+26 %
Norway	47 600	39 800	39 800	-16 %	0 %
Estonia	55 100	44 100	34 400	-38 %	-22 %
Spain	30 400	29 800	32 300	+6 %	+8 %
China and Hong Kong	69 700	20 000	29 900	-57 %	+50 %
Switzerland	29 400	26 300	28 000	-5 %	+6 %
Denmark	28 500	25 700	25 500	-10 %	-1 %
Belgium	21 200	23 200	25 200	+19 %	+9 %
India	23 800	18 200	23 200	-3 %	+28 %
Poland	26 900	16 200	22 800	-15 %	+40 %
Japan	41 400	16 000	21 300	-49 %	+34 %



Registered overnights

RUDOLF STATISTICS - OVERNIGHTS - SEASONS DETAILS

MENU

Main page

GO



Year

2018

2019

2020

2021

2022

2023

Latest

Season

Winter

Spring

Summer

Autumn

Main area

All

Region

All

Sub-region

All

Municipality

All

REVERT TO DEFAULT

Total Overnights

Foreign Overnights

Domestic overnights

REVENUE VIEW

FOREIGN OVERNIGHTS Spring season 2024

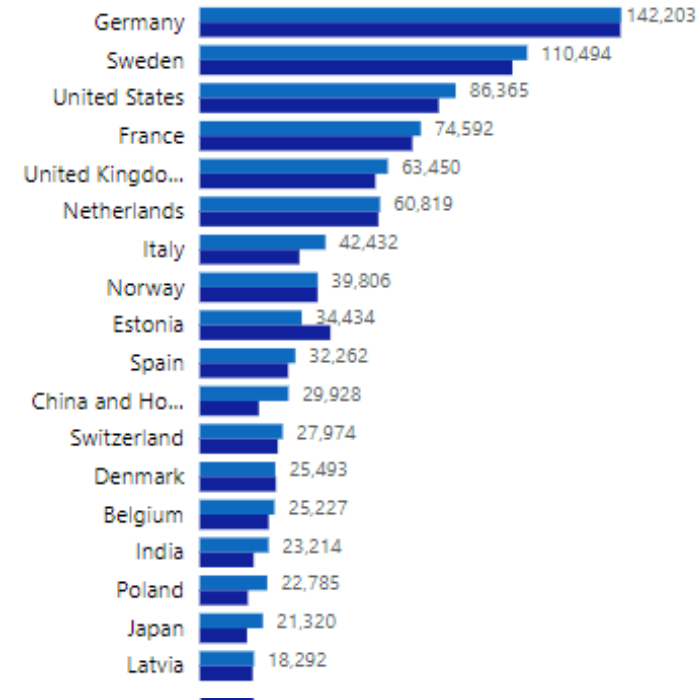
Main area	Overnights	Prev. yr. overnights	YoY change %
HELSENKI REGION	545,514	522,346	4.4
LAPLAND REGION	346,459	302,583	14.5
COAST & ARCHIPELAGO	164,036	154,230	6.4
Southwest Finland	34,548	32,231	7.2
Åland	33,028	30,775	7.3
North Ostrobothnia (excl. Kuusamo)	27,728	25,083	10.5
Uusimaa 2 (excl. Helsinki Metropolitan Area)	24,187	21,748	11.2
Satakunta	17,186	14,370	19.6
Ostrobothnia	13,592	14,596	-6.9
South Ostrobothnia	5,393	5,298	1.8
Kymenlaakso	5,032	6,226	-19.2
Central Ostrobothnia	3,342	3,903	-14.4
LAKELAND	110,048	128,650	-14.5
Pirkanmaa	41,419	56,435	-26.6
Central Finland	17,776	20,088	-11.5
Päijät-Häme	15,244	13,412	13.7
North Savo	7,745	7,964	-2.7
North Karelia	7,637	6,721	13.6
South Savo	6,118	5,928	3.2
Kainuu	5,879	6,149	-4.4
South Karelia	4,280	5,110	-16.2
Kanta-Häme	3,950	6,843	-42.3
Total	1,166,057	1,107,809	5.3

Graph view

Data view

OVERNIGHTS Spring season 2024

Overnights Previous year



Sources: Statistics Service Rudolf, Statistics Finland

The most popular destinations during spring season 2024 (vs. spring 2023):

- Helsinki (+4%)
- Rovaniemi (+7%)
- Vantaa (+9%)
- Inari-Saariselkä (+33%)
- Kittilä-Levi (+1%)
- Tampere (-27%)
- Espoo (-4%)
- Kolari-Ylläs (+5%)
- Turku (+2%)



Visit Finland

Rudolf statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland 18

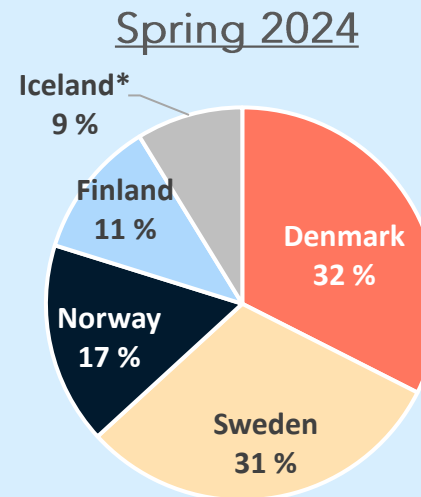
Registered overnights in the Nordics

- **Total number** of cumulative overnights during **Jan-May 2024** was **15.5 million**, which was 10% more than same period last year and 8% more than in 2019.
 - Compared to last year, overnights increased to each Nordic country, except Iceland.
 - However, Finland is the only Nordic country where overnights for Jan-May haven't reached the pre-pandemic level.

Spring (March-May) 2024

- Registered overnights **during spring 2024** increased in Denmark, Sweden, and Norway both compared to previous spring and to spring 2019.

Overnights, millions	Spring 2019	Spring 2023	Spring 2024	Change 2024 vs. 2019	Change 2024 vs. 2023
Denmark	2,6	3,1	3,3	+28 %	+9 %
Sweden	2,9	2,8	3,1	+9 %	+14 %
Norway	1,5	1,4	1,7	+13 %	+17 %
Finland	1,4	1,1	1,2	-16 %	+5 %
Iceland*	0,9	1,0	0,9	+5 %	-8 %
Total	9,2	9,3	10,2	+11 %	+9 %



NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality

Foreign

Year

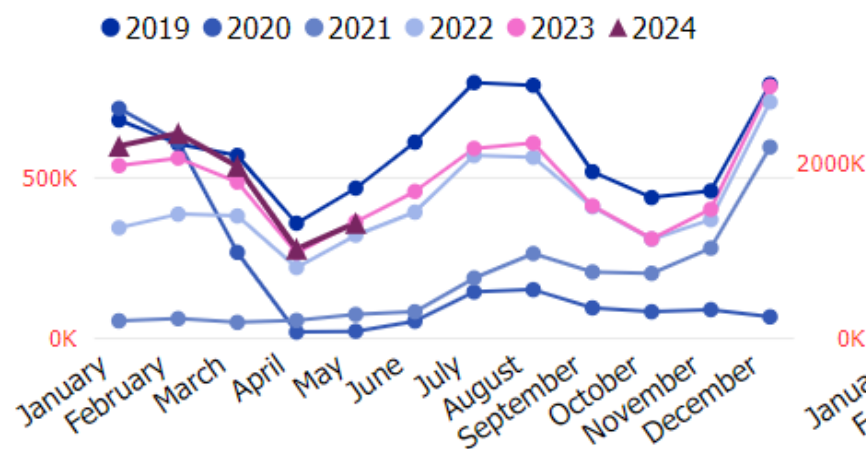
2024

Month

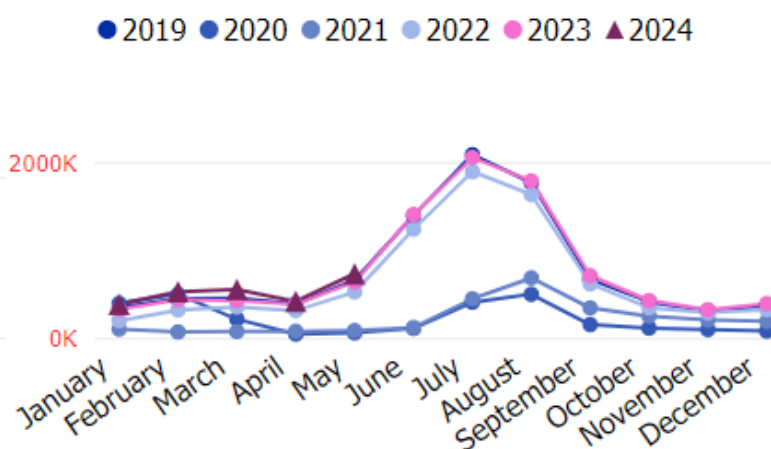
May

VISIT
FINLAND

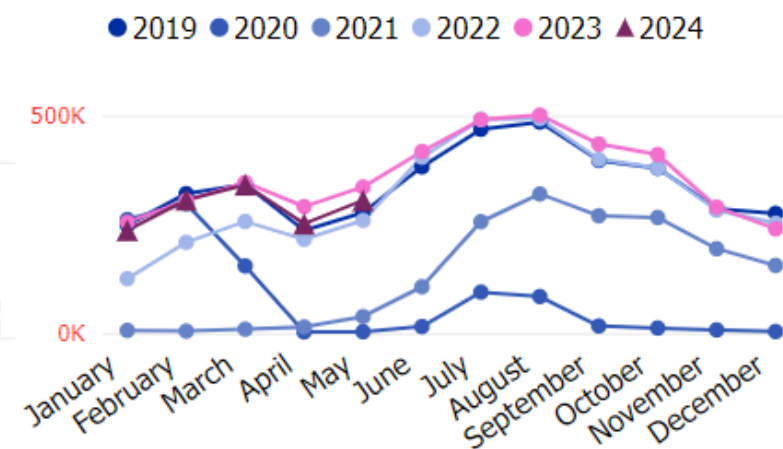
FINLAND



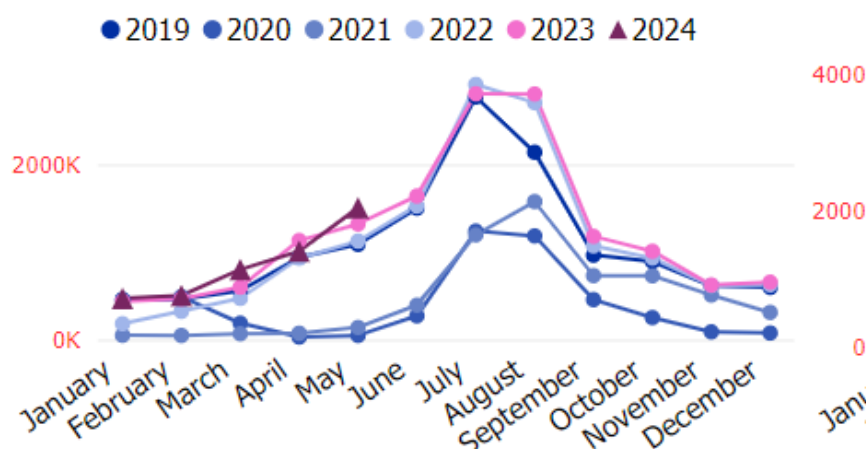
NORWAY



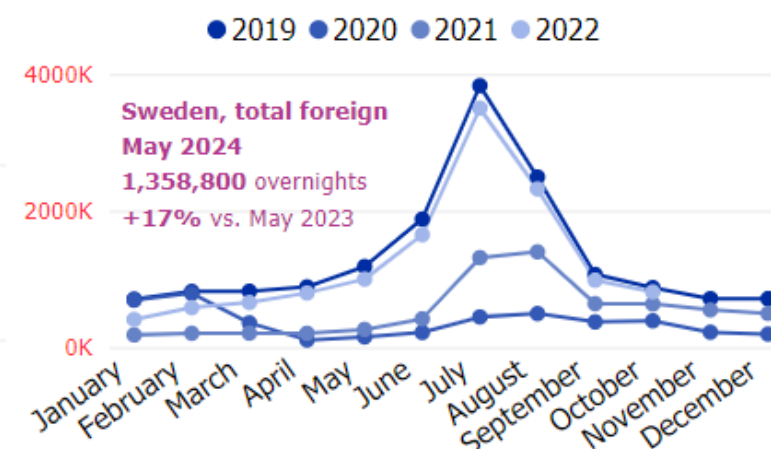
ICELAND



DENMARK



SWEDEN



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

Foreign overnights - Cumulative Jan-May

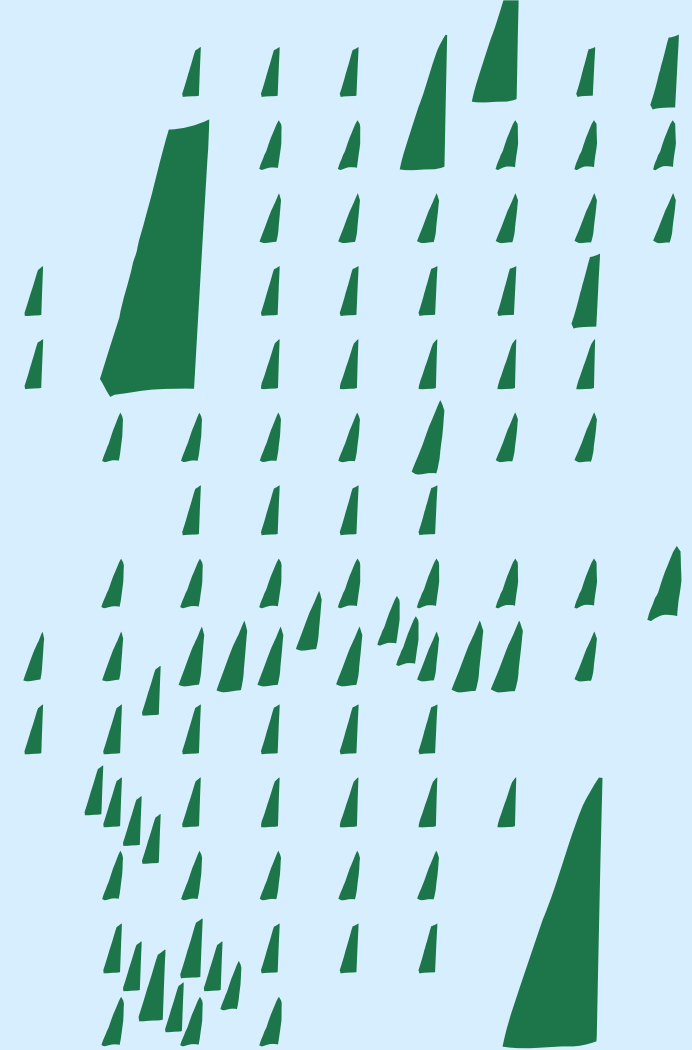
Overnights, millions	Jan-May 2019	Jan-May 2023	Jan-May 2024	Change 2024 vs. 2019	Change 2024 vs. 2023
Sweden	4,4	4,2	4,7	7 %	14 %
Denmark	3,5	4,0	4,3	23 %	8 %
Norway	2,3	2,2	2,6	14 %	18 %
Finland	2,7	2,2	2,4	-10 %	9 %
Iceland	1,4	1,5	1,4	1 %	-6 %
Total	14,3	14,1	15,5	8 %	10 %

Monthly overnight statistics for Iceland include hotels only.

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

Flight capacity and bookings for Jun-Aug 2024

- **Flight capacity** as well as **bookings** for the **summer season** have **increased** to Finland, Sweden, and Norway **compared to previous summer**. However, **Norway** is the only one of these neighbouring countries which **has also reached the pre-pandemic level**.
- When focusing on bookings from the target markets to **Finland**, **summer bookings** from **USA, the Netherlands, and Spain** have exceeded the 2019 levels. For **Sweden** recovered markets are **UK and Spain**. **Norway** differs from Finland and Sweden, as **demand from nearly all main European markets has recovered**.



Seat capacity & flight bookings worldwide

Seat capacity on direct flights

Jun-Aug/2024 compared to previous year (& pre-pandemic)



Database update 07-Jul



+13% (-17%)



+4% (-13%)



+8% (0%)

Flight bookings (direct & non-direct flights)

Jun-Aug/2024 compared to previous year (& pre-pandemic)



Database update 30-Jun



+11% (-18%)



+11% (-11%)



+16% (+3%)

Seat capacity & flight bookings from selected European markets* and USA

*) Germany, Switzerland, Austria, Netherlands, Belgium, UK, France, Spain, Italy

Seat capacity on direct flights

03-08/2022 compared to pre-pandemic 03-08/2019



Database update 07-Jul



+8% (-8%)



+5% (-12%)



+8% (+7%)

Flight bookings (direct & non-direct flights)

03-08/2022 compared to pre-pandemic 03-08/2019



Database update 30-Jun



+4% (-7%)



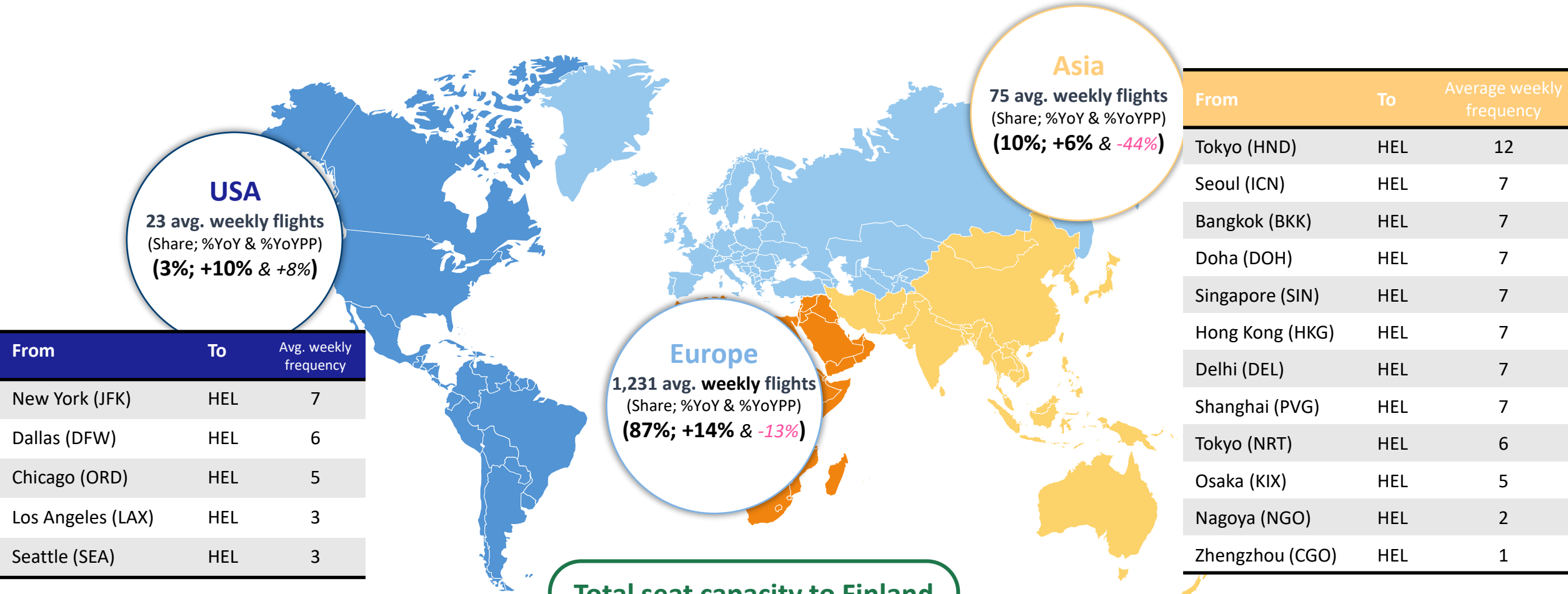
+8% (-6%)



+18% (+16%)

Direct int'l flights to Finland June – August 2024

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



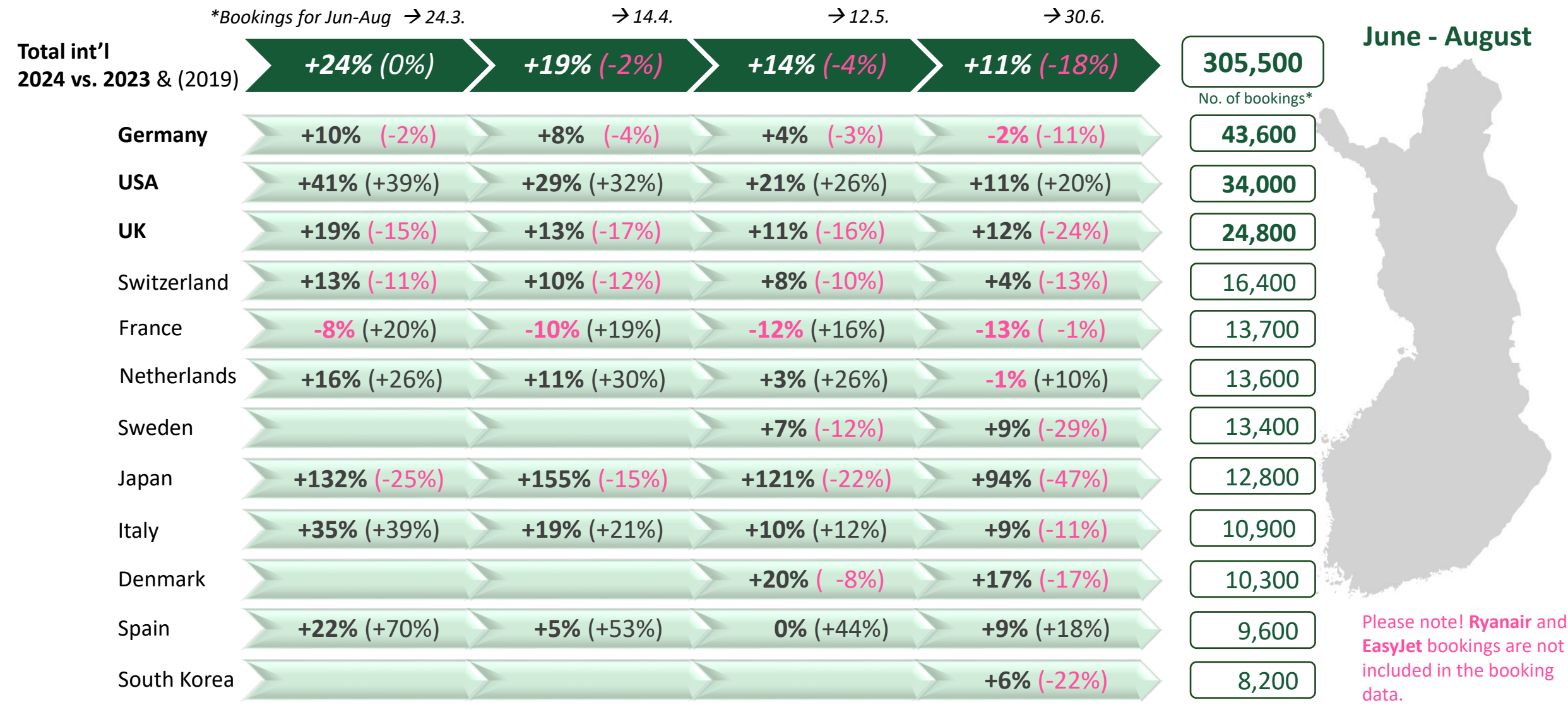
From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	6
Chicago (ORD)	HEL	5
Los Angeles (LAX)	HEL	3
Seattle (SEA)	HEL	3

From	To	Average weekly frequency
Tokyo (HND)	HEL	12
Seoul (ICN)	HEL	7
Bangkok (BKK)	HEL	7
Doha (DOH)	HEL	7
Singapore (SIN)	HEL	7
Hong Kong (HKG)	HEL	7
Delhi (DEL)	HEL	7
Shanghai (PVG)	HEL	7
Tokyo (NRT)	HEL	6
Osaka (KIX)	HEL	5
Nagoya (NGO)	HEL	2
Zhengzhou (CGO)	HEL	1

Total seat capacity to Finland
for June – August 2024
2.8 M
+13% vs. 2023 & -17% vs. 2019

Follow up on flight bookings* to Finland for June - August 2024

compared to **summer 2023** & (summer pre-pandemic) / Total int'l & top 12 source countries



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 30.6.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	305,500	+11%	-18%
Germany	43,600	-2%	-11%
USA	34,000	+11%	+20%
UK	24,800	+12%	-24%
Switzerland	16,400	+4%	-13%
France	13,700	-13%	-1%
Netherlands	13,600	-1%	+10%
Japan	12,800	94%	-47%
Italy	10,900	+9%	-11%
Spain	9,600	+9%	+18%
South Korea	8,200	+6%	-22%
Austria	6,200	+10%	-8%
Belgium	5,400	+6%	-32%
India	4,300	-4%	-20%
China	4,200	+106%	-81%
Hong Kong	2,700	+51%	-67%
UAE	700	+10%	-30%

Bookings to <u>SWEDEN</u> from	No. of bookings by 30.6.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	511,700	+11%	-11%
USA	90,700	+15%	-1%
Germany	77,800	+12%	-3%
UK	48,400	+7%	0%
Switzerland	31,200	+3%	-12%
France	25,300	-11%	-17%
Netherlands	23,900	+10%	-11%
Austria	17,900	+12%	-5%
Spain	11,300	+4%	+19%
China	10,900	+137%	-48%
Belgium	10,700	-16%	-30%
Italy	10,000	+10%	-9%
India	6,300	+1%	-13%
Japan	6,100	+67%	-49%
UAE	3,200	-3%	-21%
South Korea	3,000	+34%	-34%
Hong Kong	1,800	+36%	-59%

Bookings to <u>NORWAY</u> from	No. of bookings by 30.6.	Bookings vs. 2023	Bookings vs. 2019
Total int'l	482,100	+18%	+3%
USA	103,600	+30%	+33%
Germany	53,500	+12%	+6%
France	36,500	0%	+12%
UK	34,200	+15%	+4%
Netherlands	28,100	+11%	-2%
Switzerland	25,500	+12%	+13%
Italy	16,600	+38%	+26%
Spain	13,600	+18%	+53%
Belgium	11,400	+13%	+7%
Austria	10,000	+29%	+42%
China	6,600	+136%	-62%
South Korea	5,700	+54%	-28%
Japan	4,900	+60%	-55%
UAE	4,100	+17%	+15%
India	4,000	-4%	-5%
Hong Kong	1,600	+31%	-73%

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

Source: ForwardKeys Destination Gateway

