



Visit Finland

VF monthly follow-up

May 2025

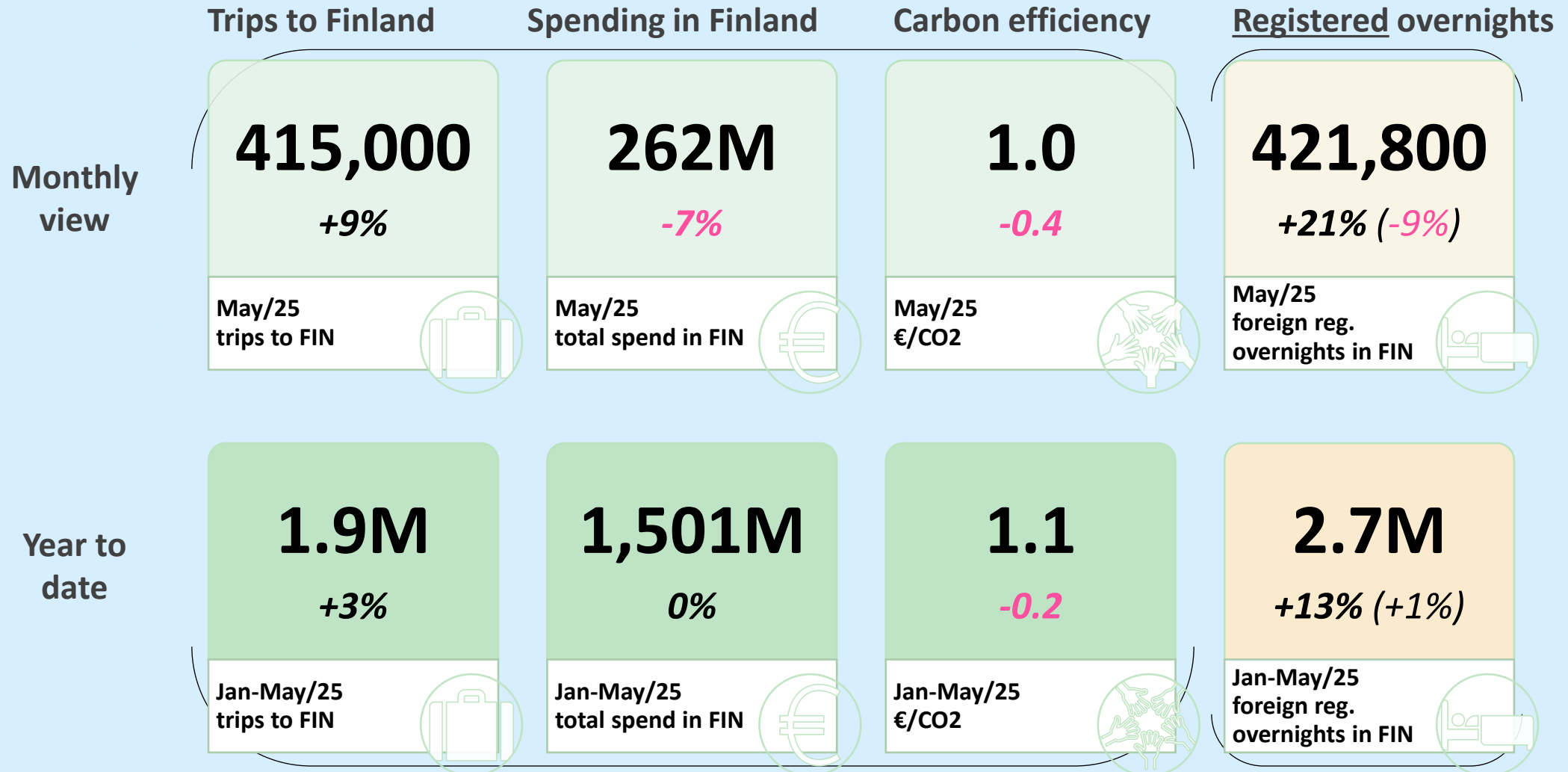
Summary

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

- From January to May 2025, the **number of visitors** to Finland **increased by 3%** in comparison to the same period last year. **Leisure travel saw an increase of 8%**, whereas **business travel** experienced a **6% decline**. As a result, **leisure visitors' spending** was **9% higher** than the previous year, while **business travellers' expenditures dropped by 20%**.
- Regarding **registered foreign overnight stays**, there was an **increase of 13%** compared to the prior year, and this figure was also *1% above the levels noted from January to May 2019*.
- The most recent data on **short-term rentals** indicates a **continued rise in usage throughout 2024** and into the **first quarter of 2025**. Depending on the originating market, the **proportion of short-term rentals** can range from **16% to over 40% of total paid overnight stays**, suggesting that statistics on registered overnight stays alone do not provide a complete picture anymore of the ranking of source markets and the development of paid overnight stays.
- The **Nordic region** (excl. Iceland) recorded **14.6 million registered foreign overnight stays** and a **9% increase** from January to May 2025 compared to the corresponding period last year. **Finland's market share among the four countries** was **18%**, so it remained on the same level as during Jan-May 2024.
- **Flight bookings for the summer peak season** (June-August) indicate **minor positive growth for Finland, Sweden, and Norway** in relation to the previous year. *However, only Norway has surpassed the flight booking levels of 2019.*

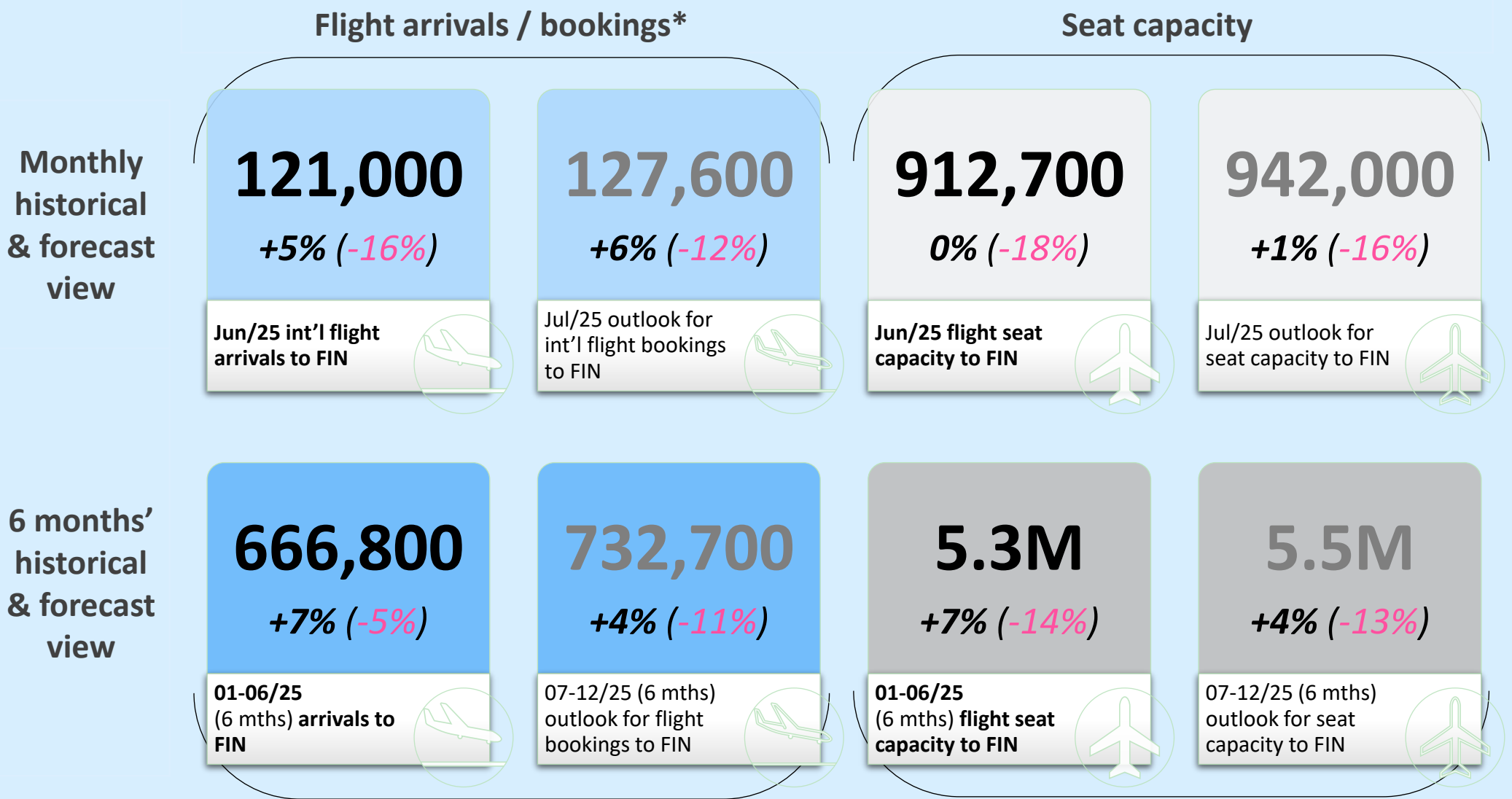
Foreign Trips to Finland & Spending & Carbon efficiency, Registered overnights

*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)

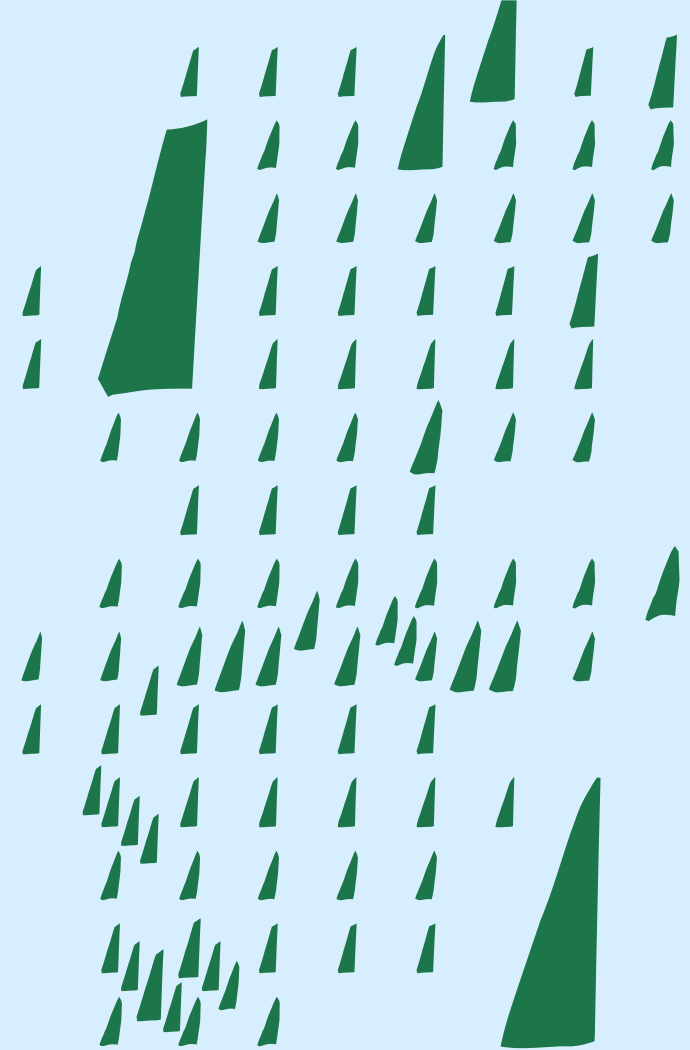


*) Flight bookings including at least 1 night stay in Finland.


Border Survey

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

- **4.9 million** visitors (YoY +3%)
 - 90% overnight trips
- Spending **3.7 billion€** (YoY -6%)
 - 755 € / trip (YoY -9%)
 - 80 € / day (YoY +7%)
- **75%** travelling for **leisure** (YoY +2 %-points)
- Advance booking time, avg **2.6 months** (YoY +0.1 months)
- Median length of stay **4 nights** (YoY no change)



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



Border Survey
MatkailijaMittari
Visit Finland

Year

Quarter

Month

Latest 12 months

All

All

All


Yes latest 12 mnth


?

Start / End date

06/2024

05/2025

Menu

Map

FI

EN

Departure region

Departure Countr...

Travel Destinations

Travel Type

Travel Purpose

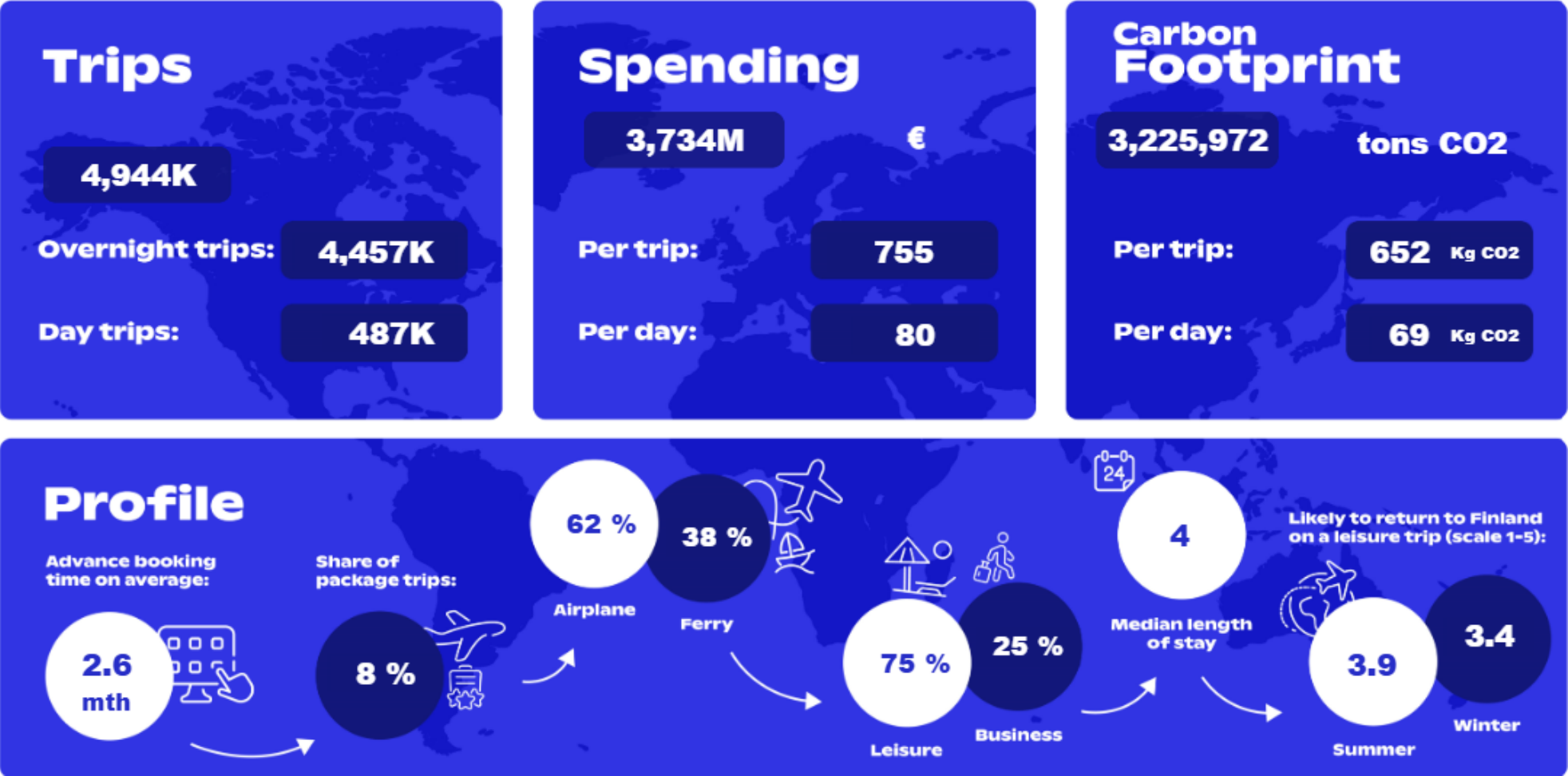
All

All

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All

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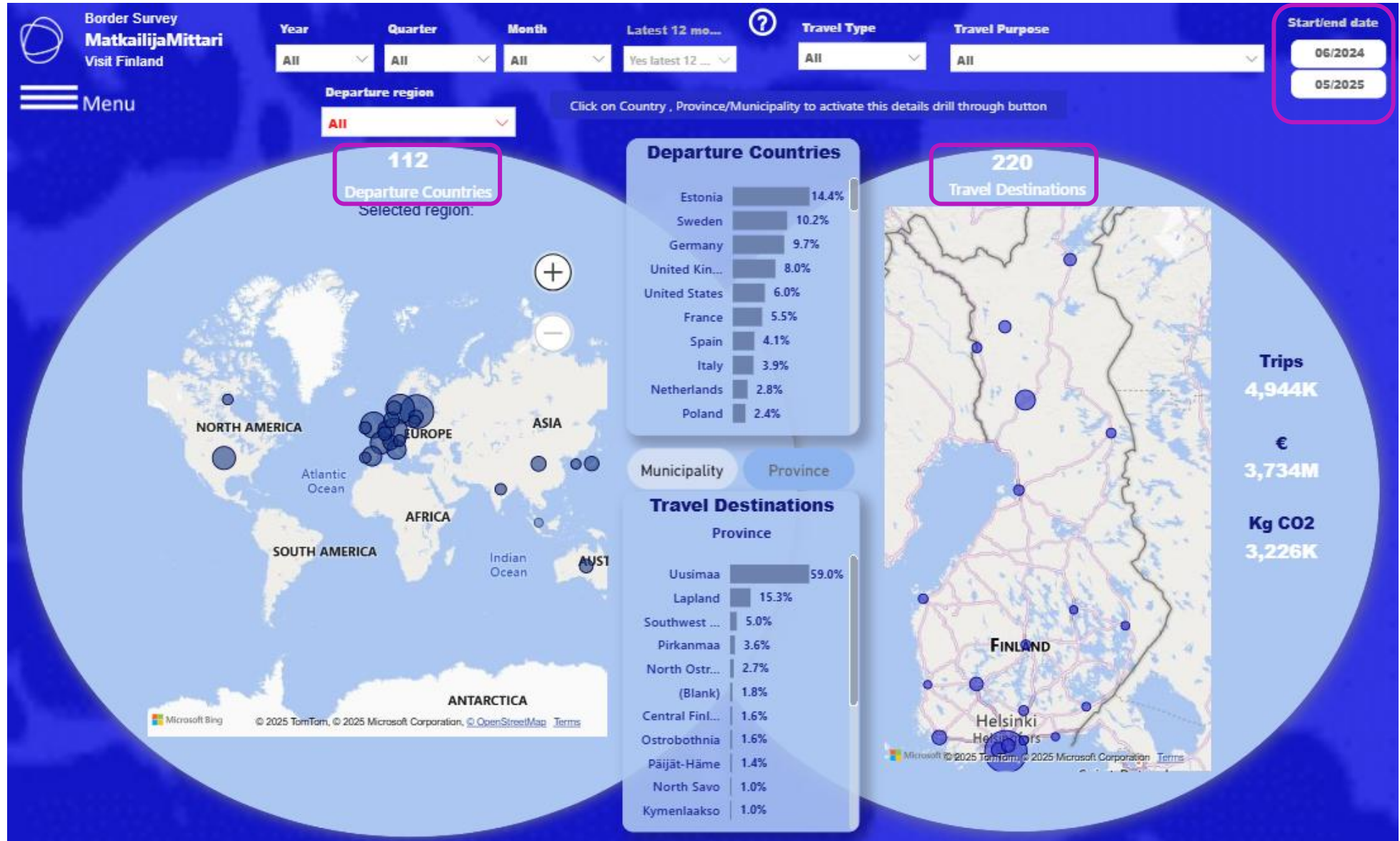


Border Survey / Latest 12 months (Jun 2024 – May 2025)

Foreign visitors in Finland

[Link to the report:](#)

[Matkailijamittari - Visit Finland](#)



Top5 source markets for leisure/personal trips

- Estonia
- Sweden
- Germany
- UK
- USA

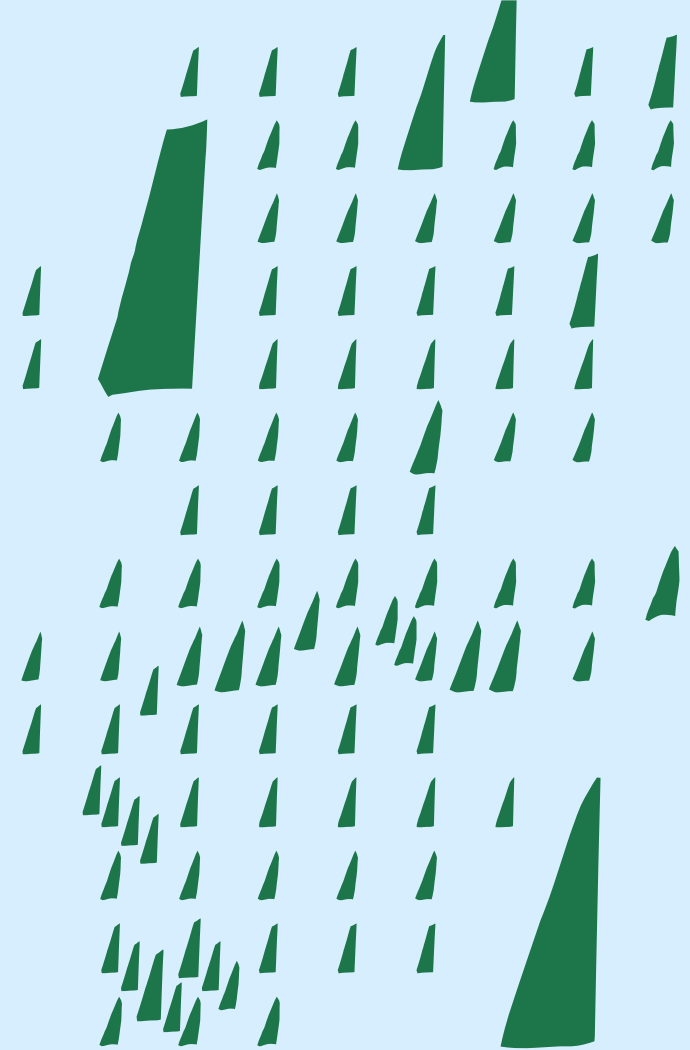
Top5 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Poland

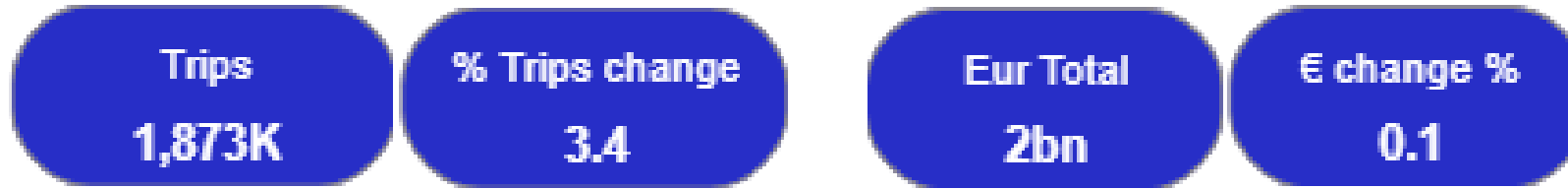
Border Survey

January-May 2025

- **Trips increased by 3%, but total spend remained at the same level** as in January-May 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.



Leisure travel increased, business travel decreased in Jan-May 2025



- **Leisure travel** to Finland **increased by 8%** during the first five months of this year. Visitors travelling for leisure purposes also **spent 9% more** in Finland compared to Jan-May 2024.
- On the other hand, **business travel decreased** at the same time by **6%** and the **total spend** by business travellers **decreased** as much as **20%** compared to Jan-May 2024.

Leisure travellers

Trips	Prev yr	Trips change
1,330K	1,229K	+8%
€ Total	Prev yr	€ change
1,128M	1,031M	+9%

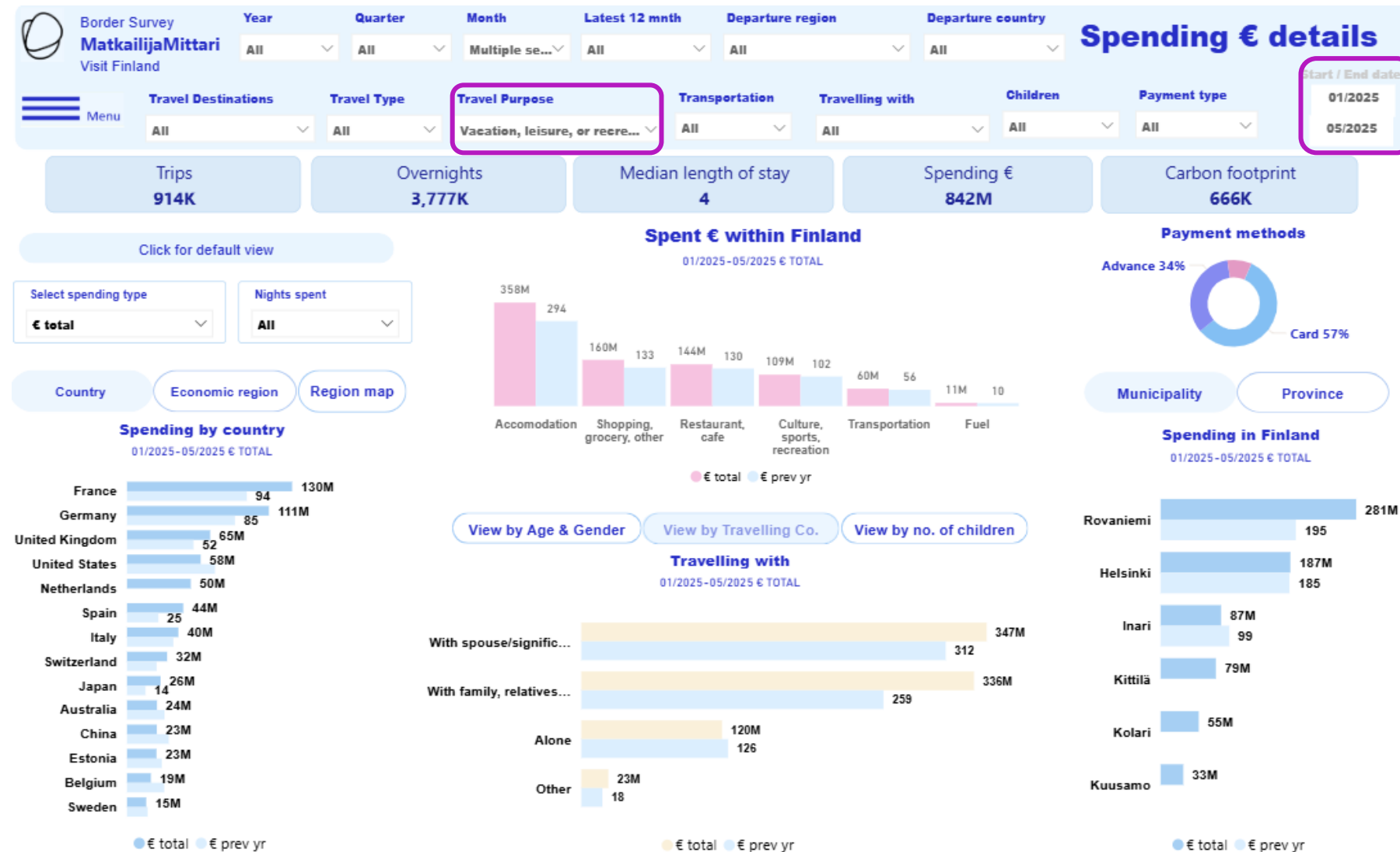
Business travellers

Trips	Prev yr	Trips change
523K	557K	-6%
€ Total	Prev yr	€ change
354M	441M	-20%

Spend by vacation travellers in Finland during Jan-May 2025

Jan-May 2025 vs. Jan-May 2024

- **Total spend was highest for vacation travellers** coming from **France** and **Germany** and their total spend also **increased** clearly compared to the previous year.
- **Rovaniemi** was clearly benefitting from the higher total spend of the holiday makers.
- **Over 40%** of the total spend of the holiday makers was used for **accommodation**. The shares of **shopping** (incl. grocery) as well as **restaurants and cafes** were both nearly **20%** of their total spend.



Trips & Spending by top5 source markets in Jan-May 2025

All foreign visitors in Finland

Country	Vacation Trips	YoY trips change %
Estonia	262,000	-24%
Germany	196,000	+10%
Sweden	156,000	+6%
UK	149,000	+8%
France	144,000	+14%

Country	M€ total	YoY € change %
Germany	168.5	+10%
France	167.4	+25%
Estonia	110.4	-27%
UK	103.0	+8%
USA	88.4	-6%

Country	€ / trip	YoY € / trip change %
China	1,462	+9%
Austria	1,324	-35%
France	1,165	+10%
Australia	1,119	-22%
USA	1,082	-20%

Country	€ / day	YoY € / day change %
Japan	148	-21%
Netherlands	145	+4%
Belgium	144	+35%
France	138	+43%
USA	137	+1%

Vacation/recreation travellers in Finland

Country	Vacation Trips	YoY trips change %
Germany	110,000	+18%
France	102,000	+31%
UK	77,000	+22%
Estonia	63,000	+4%
Sweden	53,000	+48%
USA	53,000	+28%

Country	M€ total	YoY € change %
France	129.7	+38%
Germany	111.4	+31%
UK	65.3	+25%
USA	57.9	-16%
Netherlands	50.1	+2%

Country	€ / trip	YoY € / trip change %
Switzerland	1,316	-6%
France	1,276	+5%
Australia	1,232	-14%
Belgium	1,182	+14%
Netherlands	1,155	-6%

Country	€ / day	YoY € / day change %
France	203	+25%
Japan	191	-26%
Netherlands	186	+9%
Belgium	183	+5%
Italy	182	-4%

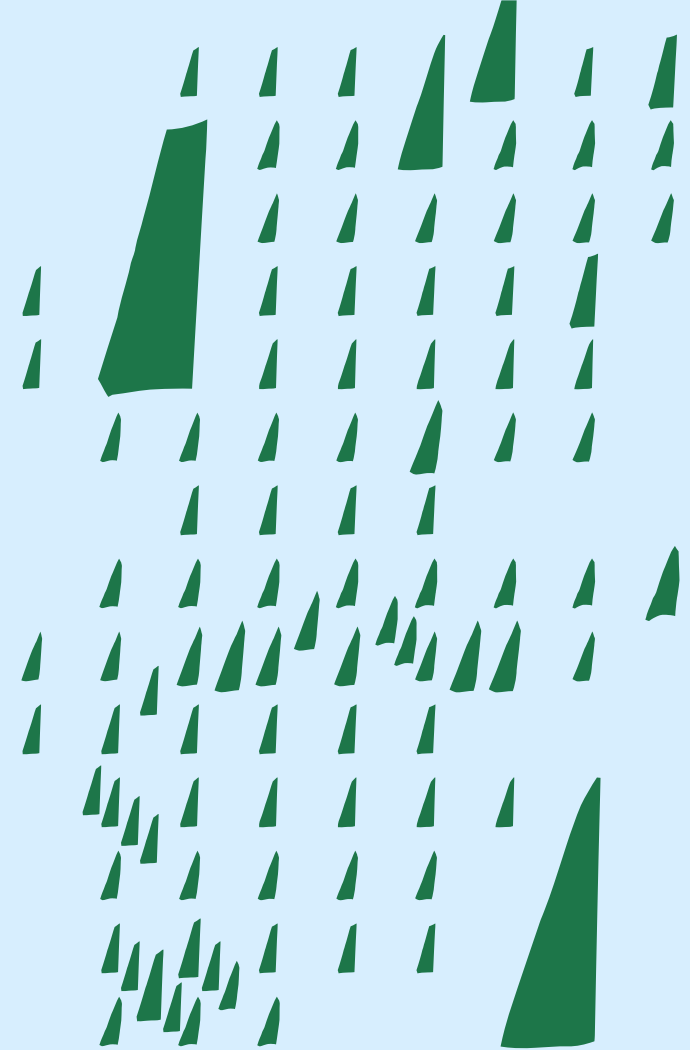
Registered Overnights

January – May 2025

- The number of registered foreign overnights reached nearly **2.7 million**, marking an **13%** increase from the previous year. *This figure also surpassed the levels of 2019 by 1%.* The leading source markets were **Germany, France, UK, and the Netherlands.**
- Overall accommodation revenue grew by **5%**, with foreign revenue rising by **19%** compared to January-May 2024 (domestic revenue fell by 2%). **Foreign revenue accounted for 40%** of the total accommodation revenue.

May 2025

- Total foreign overnights reached **421,800** (+21% YoY, & **-9%** compared to May 2019).
- Leading source markets included **Sweden, Germany, USA, and UK.**
- **Over half** of registered foreign overnights took place in **Helsinki**. Other main destinations in May were Vantaa, Espoo, Turku, and Tampere.



Registered overnights Jan-May 2025

	Jan-May 2025	Change-% vs. Jan-May 2024	Change-% vs. Jan-May 2019
Total	8.2M	+2%	-1%
Domestic	5.5M	-3%	-1%
Foreign, total	2.7M	+13%	+1%
Foreign excl. Russia	2.7M	+13%	+16%
Scandinavia	272,700	+7%	-3%
EU-27 + UK	1.7M	+7%	+19%
America	217,600	+17%	+47%
Asia	424,500	+39%	-3%



Main source markets

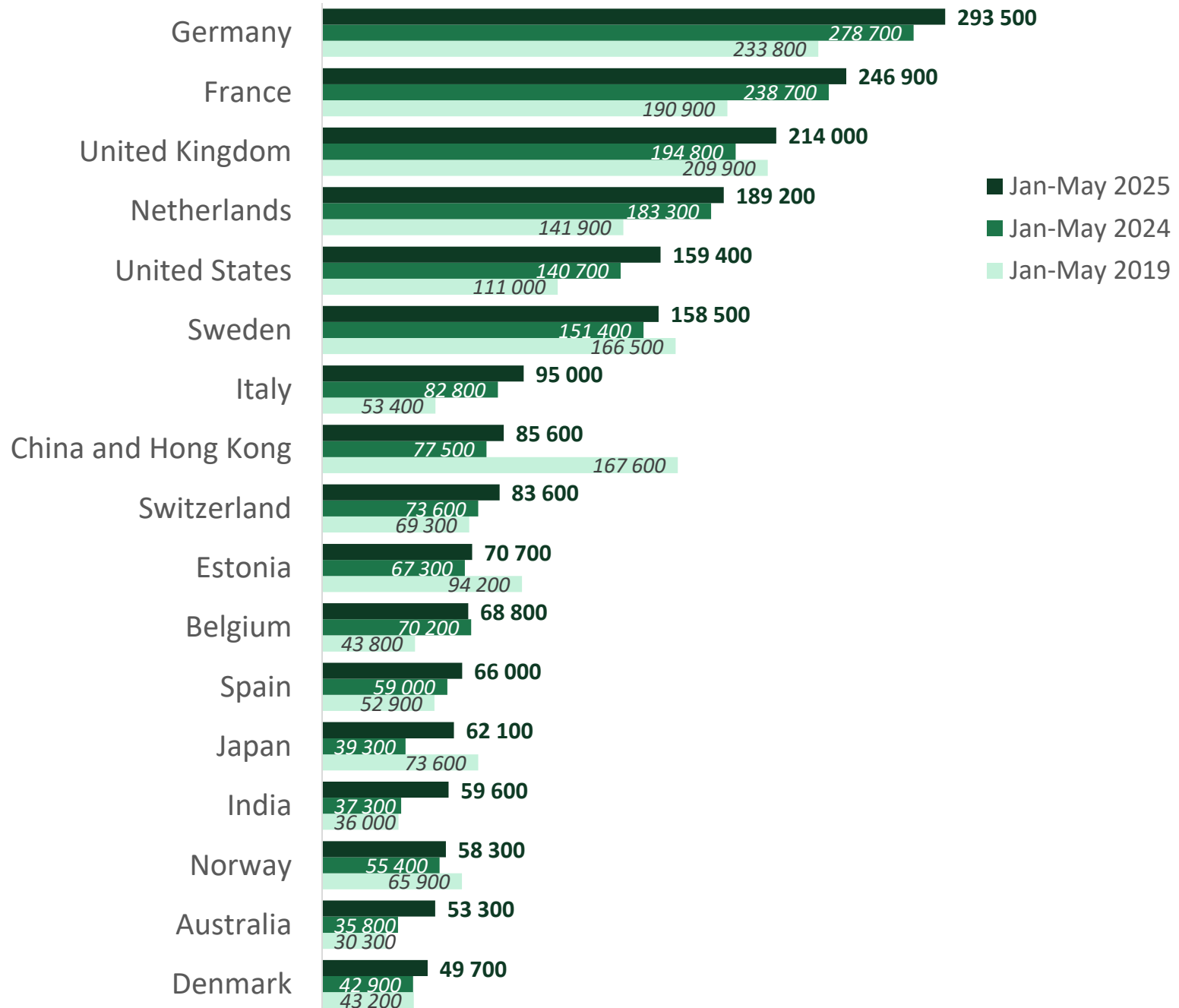
Jan-May 2025

vs. Jan-May 2024 & Jan-May 2019

Between January and May 2025, **Germany** and **France** were the leading source markets in terms of **registered overnights**.

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

In comparison to January-May 2019, overnights from Sweden (-5%), China including Hong Kong (-49%), Estonia (-25%), Japan (-16%), 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 May

Overnights 8.2M TOTAL overnights	YoY change % 2 YoY change %	Foreign 2.7M Overnights	YoY change % 12.9 Foreign	Domestic 5.5M Overnights	YoY change % -3 Domestic	Revenue 598.5M TOTAL revenue	YoY change % 5 YoY change %
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VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

View Main regions, Regions by

Domestic

Foreign

REGIONAL OVERNIGHTS

OVERNIGHTS FOREIGN REGION 2025,
202501-202505

Foreign excluding Russia	2,693,898
Europe	1,868,600
EU-28	1,698,387
EU-27 excluding UK	1,484,402
Asia	424,460
Scandinavia	272,733
America	217,632
Oceania	57,013
Africa	14,400

REVENUE 2025

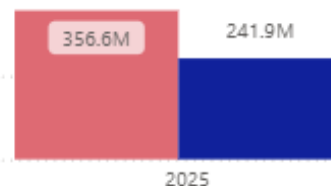


400M

200M

0M

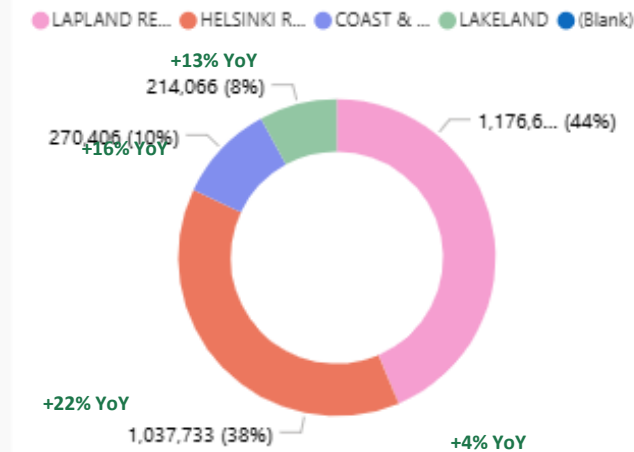
Domestic revenue Foreign revenue
-2% YoY +19% YoY



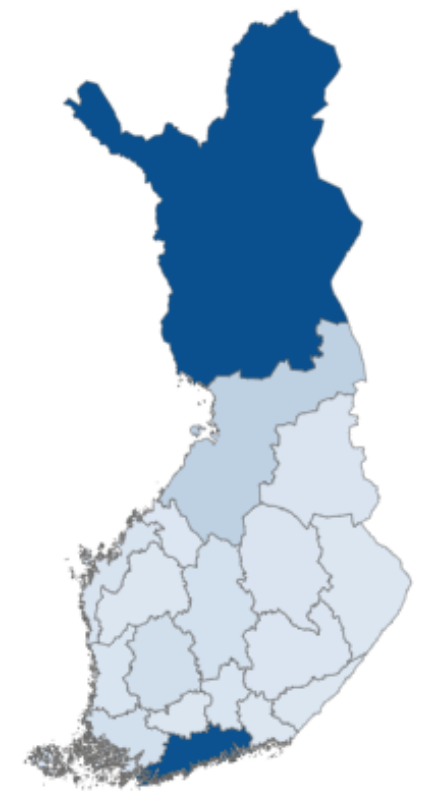
OVERNIGHTS BY COUNTRY YEAR 2025,
202501-202505

Germany	293,533
France	246,933
United Kingdom	213,985
Netherlands	189,189
United States	159,358
Sweden	158,471
Italy	95,049
China and Hong Kong	85,644
Switzerland	82,552

OVERNIGHTS IN MAIN REGIONS YEAR 2025, 202501-202505



The proportion of **foreign overnight stays** accounted for **33%** of the total registered stays. Meanwhile, the share of **foreign revenue** reached an impressive **40%**.



Sources: Statistics Service Rudolf, Statistics Finland

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

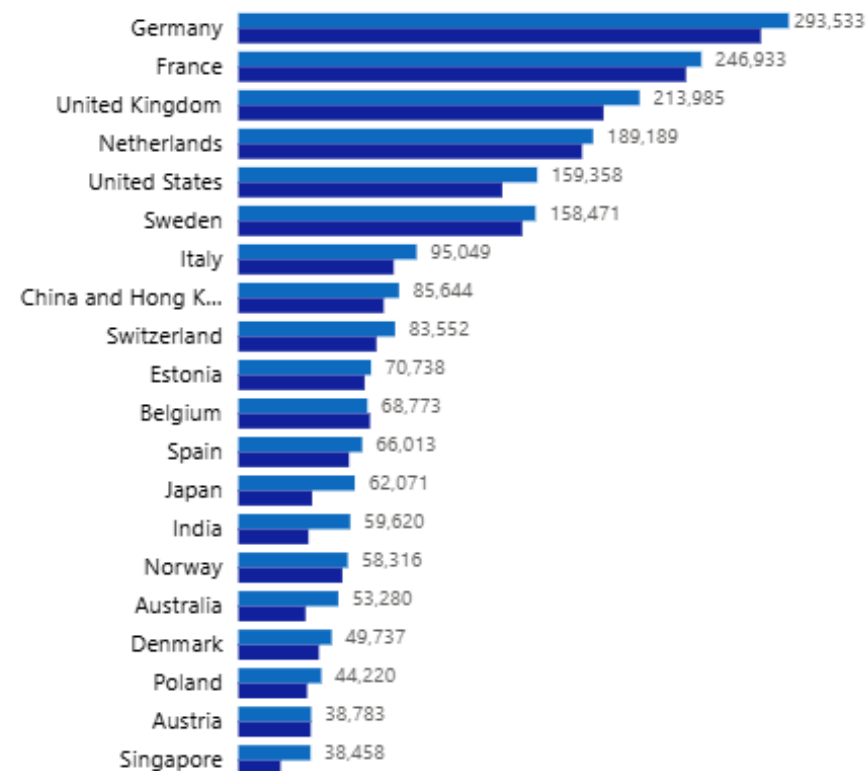
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2025 compared to 2024 months 1-5

Main area	2025 MAX year	2024 MIN year	Change %
LAPLAND REGION	1,176,627	1,109,861	6.0
HELSINKI REGION	1,037,733	846,844	22.5
COAST & ARCHIPELAGO	270,406	240,917	12.2
North Ostrobothnia (excl. Kuusamo)	67,952	59,295	14.6
Southwest Finland	56,639	46,552	21.7
Uusimaa 2 (excl. Helsinki Metropolitan Area)	35,779	28,636	24.9
Åland	35,136	38,229	-8.1
Ostrobothnia	25,299	19,702	28.4
Satakunta	24,921	26,573	-6.2
Kymenlaakso	10,767	8,713	23.6
South Ostrobothnia	8,839	8,401	5.2
Central Ostrobothnia	5,074	4,816	5.4
LAKELAND	214,066	193,287	10.8
Pirkanmaa	60,831	62,186	-2.2
Central Finland	50,489	39,028	29.4
Päijät-Häme	24,912	22,630	10.1
Kainuu	19,314	14,691	31.5
North Savo	17,969	15,544	15.6
South Savo	11,062	11,195	-1.2
Kanta-Häme	10,740	6,910	55.4
North Karelia	10,650	12,189	-12.6
South Karelia	8,099	8,914	-9.1
Total	2,698,832	2,390,909	12.9

OVERNIGHTS 2025 compared to 2024 months 1-5

● MAX year ● MIN year



The most popular destinations during Jan-May 2025:

	YoY change
Helsinki	+21%
Rovaniemi	+10%
Kittilä-Levi	+5%
Inari-Saariselkä	-1%
Vantaa	+34%
Kolari-Ylläs	+3%
Kuusamo	+15%
Sodankylä	-8%

From the most popular destinations only Sodankylä was below (-6%) the figures of Jan-May 2019.

Registered foreign overnights increased by 21% in May

May 2025

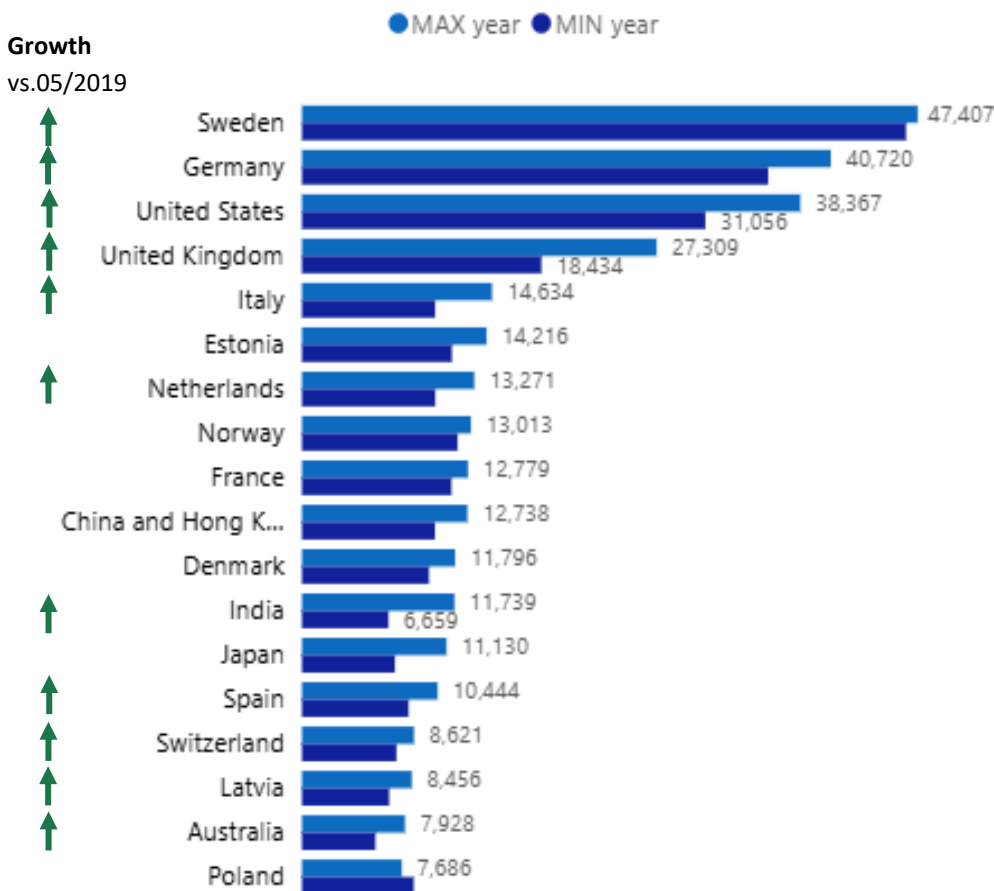
421,800 total foreign overnights;
+21% vs. 05/2024, **(-9%** vs. 05/2019)
420,800 foreign excl. Russia; **+14%**, **(+5%)**
250,100 EU+UK; **+18%**, **(+6%)**
74,500 Scandinavia; **+7%**, **(0%)**
61,700 Asia; **+39%**, **(-10%)**
52,300 America; **+28%**, **(+9%)**

Top destinations for total foreign; vs. 05/2024, (vs. 05/2019)

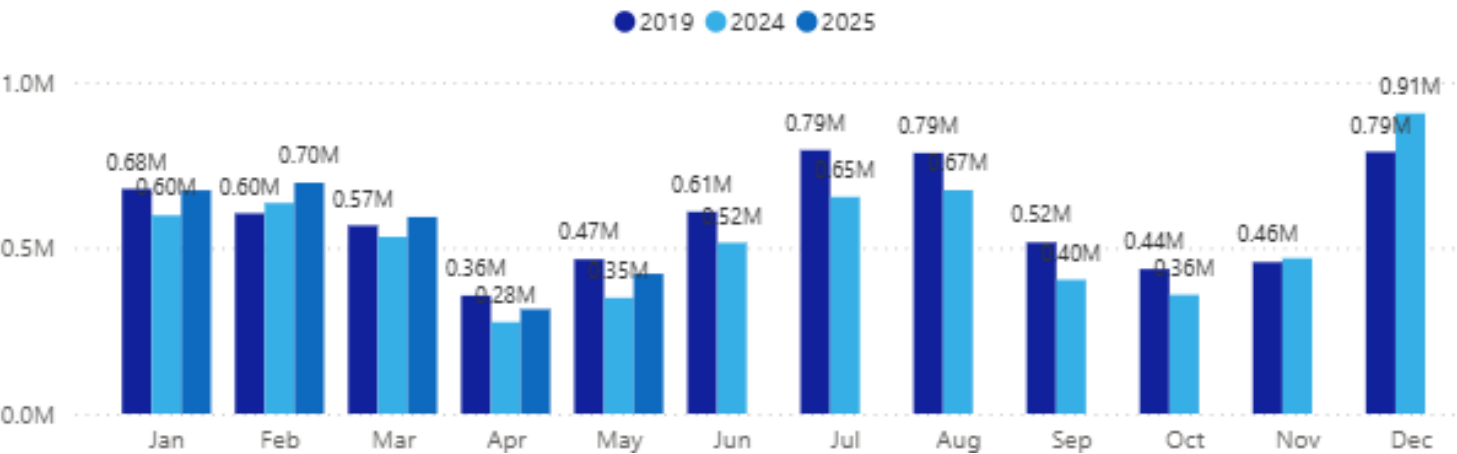
- **229,200 Helsinki; +28%**, **(+13%)**
- 37,100 Vantaa, **+34%**, **(-4%)**
- 15,500 Espoo, **+10%**, **(-1%)**
- 14,700 Turku, **+32%**, **(+13%)**
- 13,000 Tampere; **-12%**, **(-19%)**

Top source markets, total foreign; vs. 05/2025

OVERNIGHTS 2025 compared to 2024 months 5-5

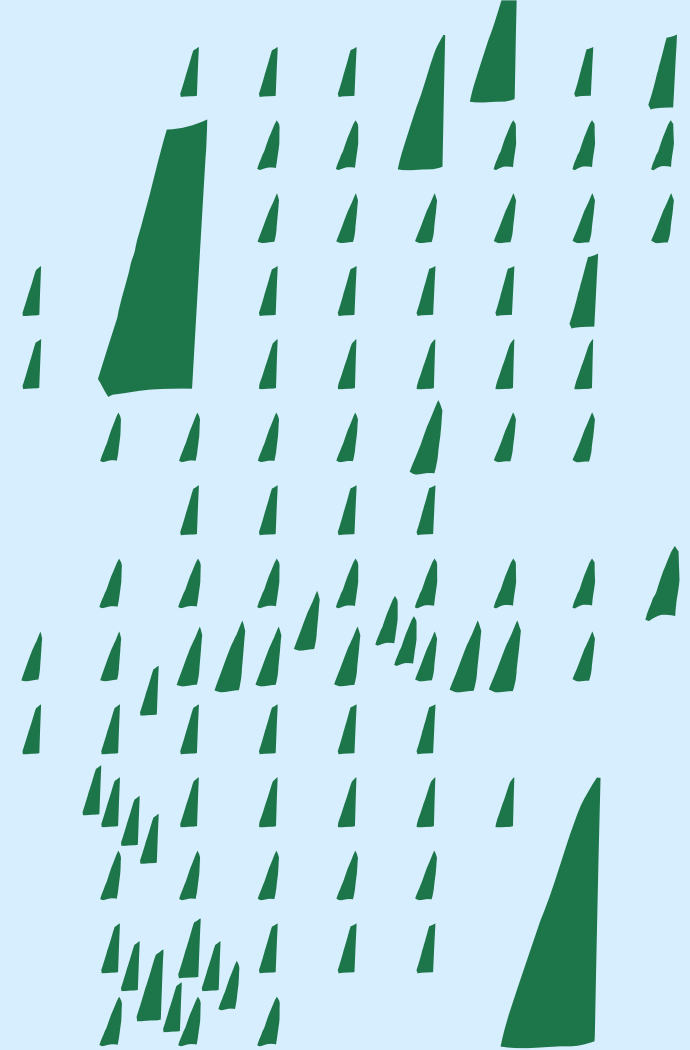


FOREIGN OVERNIGHTS



Overnights in short-term rentals

- The importance of **short-term rentals via international platforms** continues to grow.
- In **2024**, **foreign overnights** in short-term rentals added up to **2.7 million**, so the total number of **paid foreign overnights** was **9.1 million**, which was **17% more** than in 2023 *and 2% more than in 2019*. So, when looking at the total paid foreign overnights instead of only registered overnights, **travel to Finland recovered already last year to the pre-pandemic level**.
- The share of foreign overnights in short-term rentals was **30% in 2024** and during **January-March 2025** it was as high as **40%**.
 - Number of foreign overnights in short-term rentals are following the same pattern than registered overnights – **biggest increases are in winter months**.
 - In 2024, the share of overnights in short-term rentals in **Rovaniemi** was nearly **half of** the total number of **paid foreign overnights**. **Year-on-year growth rate** in short-term rentals in Rovaniemi was as high as **69%**.

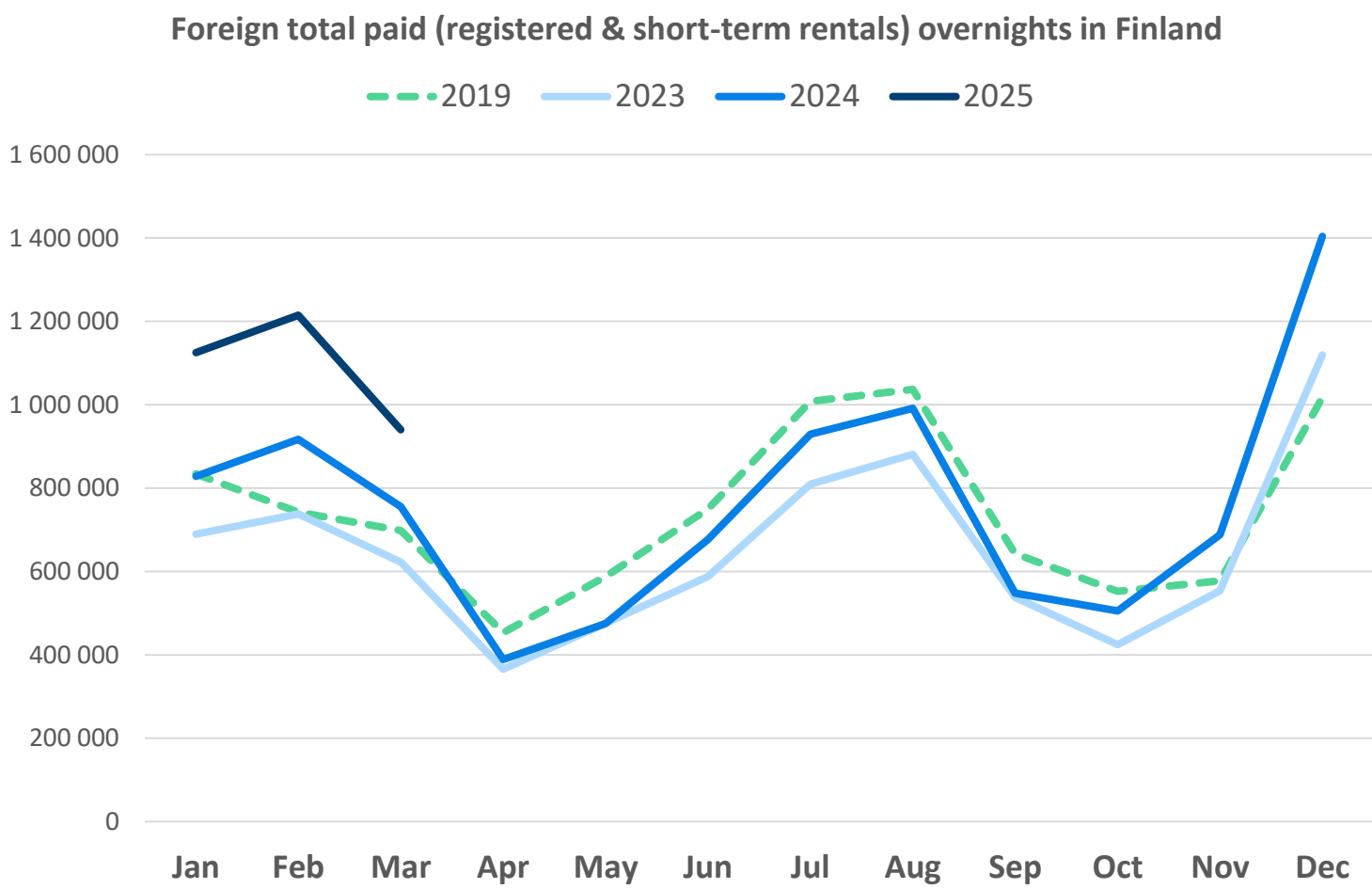
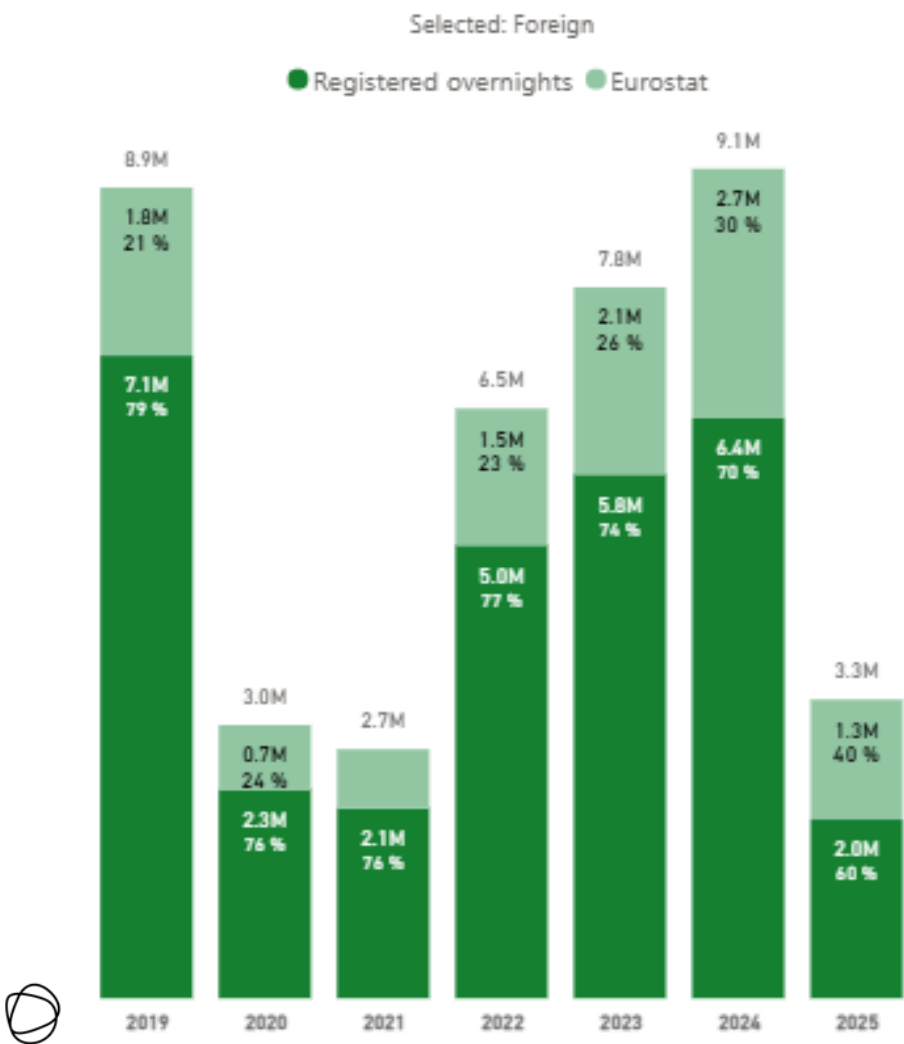


Monthly foreign total paid overnights in Finland

(Registered overnights + overnights in short-term rentals)

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

The growing popularity of short-term rentals among foreign tourists highlights the noticeable recovery and strong growth of winter travel. While summer travel has also seen an uptick, it still fell short in 2024 of reaching the overnight levels seen before the pandemic.



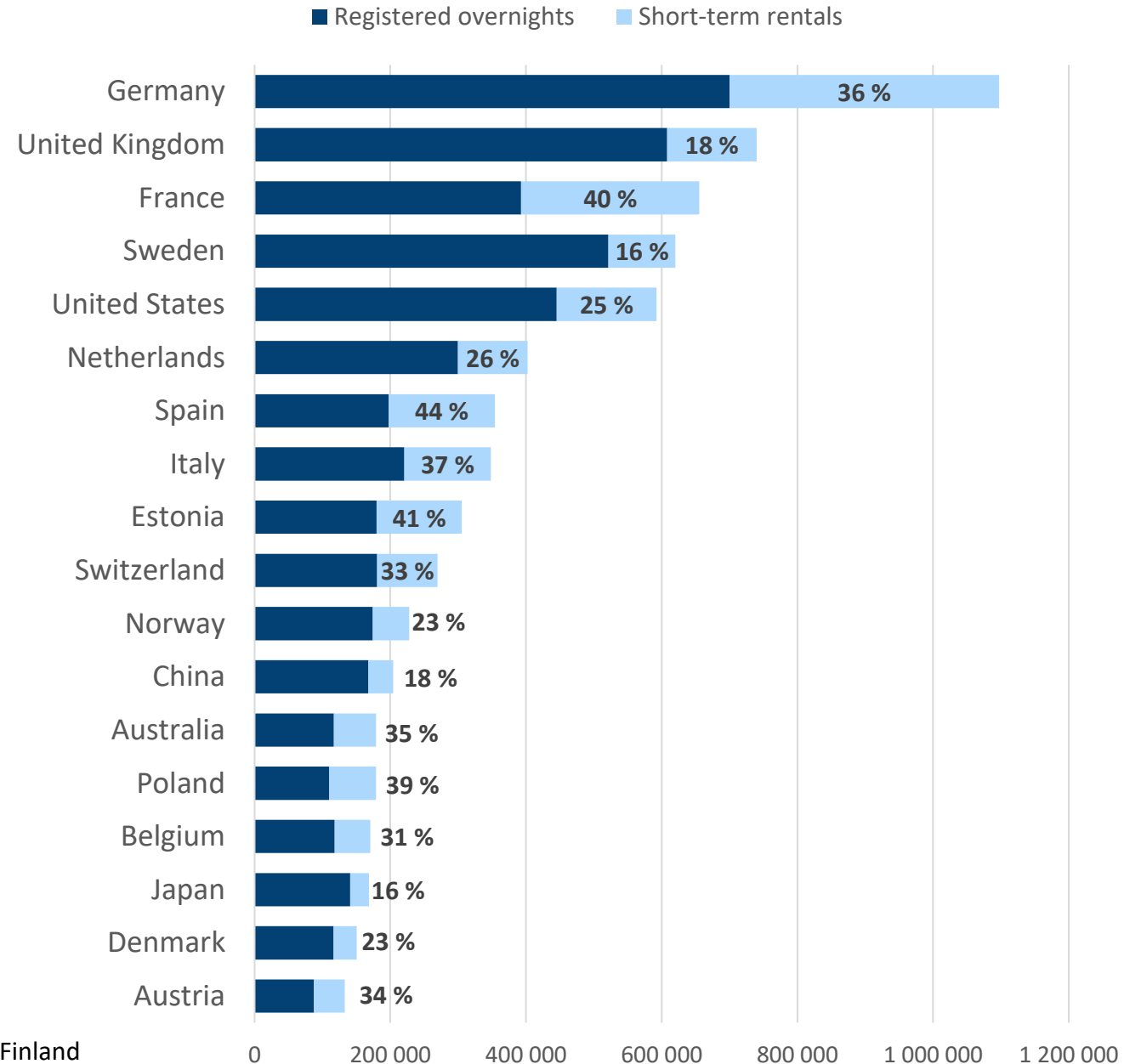
Registered and short-term rentals overnights in Finland Year 2024

In 2024, **Germany** was the dominant market for both registered and short-term rental overnights. Germany's share of short-term rentals has also significantly risen compared to prior years.

In addition to Germany, **Finland** saw overnights in short-term rentals of **30% or more** for visitors coming from **France, Spain, Italy, Estonia, Switzerland, Australia, Poland, Belgium, and Austria**.

When examining the total overnights (registered plus short-term rentals) in 2024 versus pre-pandemic levels in 2019, **the highest relative increases** among the main source markets were recorded for **Italy (+52%), the US (+46%), Belgium (+45%), France (+42%), Spain (+41%), and Austria (+40%)**.

Registered and short-term rentals overnights in Finland - 2024



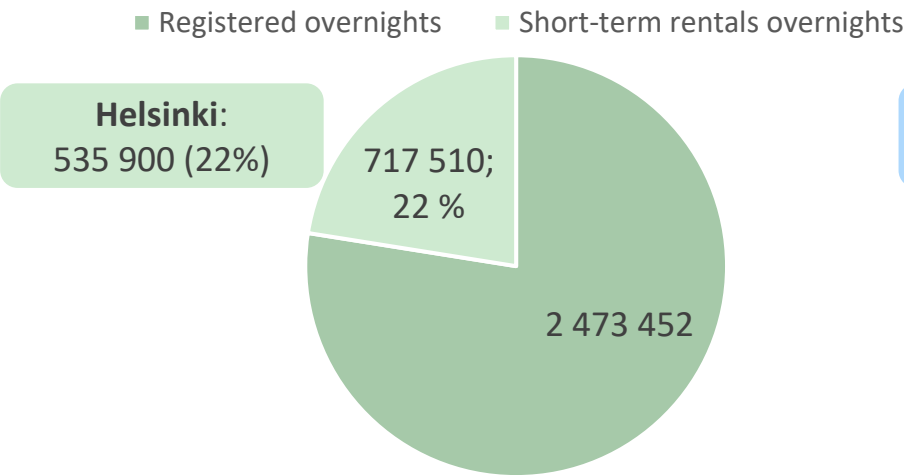
Registered and short-term rentals foreign overnights in Uusimaa & Lapland 2023-2024

The popularity of short-term rentals has notably risen, particularly in **Lapland**, where the proportion of short-term rentals increased from 27% in 2023 to **35% in 2024**. In **Rovaniemi**, almost half of all paid foreign overnight stays occurred in **short-term rentals**.

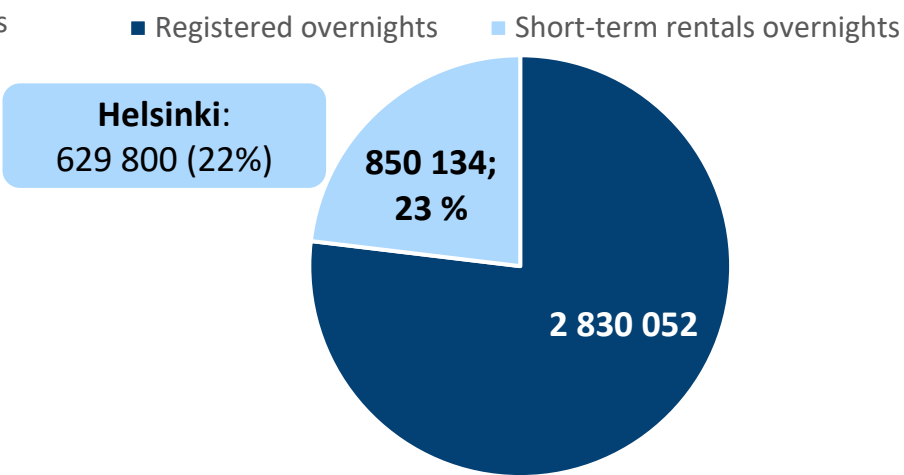
The **annual growth rate** for overnight stays in **short-term rentals in Lapland** reached **64%**, while in **Rovaniemi**, it soared to **69%**.

In **Lapland**, the **total number of paid foreign overnight stays** rose by **27%**, and in **Uusimaa**, there was a **15%** increase in 2024 compared to the previous year.

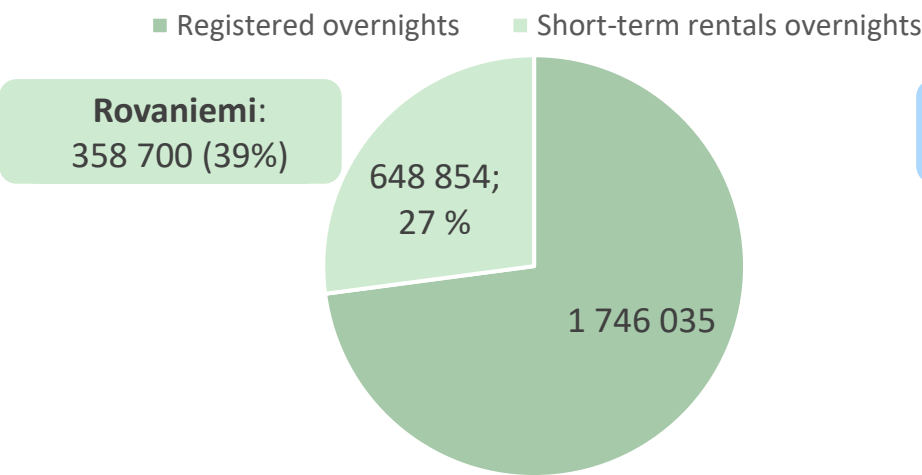
Uusimaa, foreign overnights in 2023



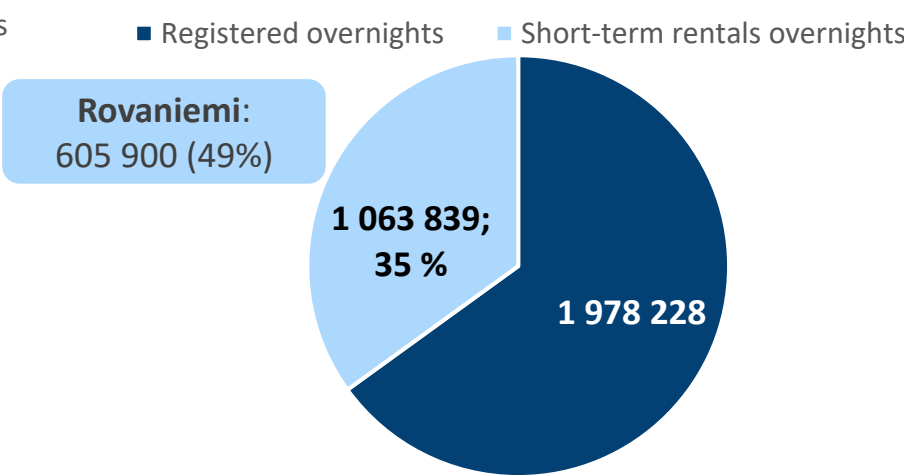
Uusimaa, foreign overnights in 2024



Lapland, foreign overnights in 2023

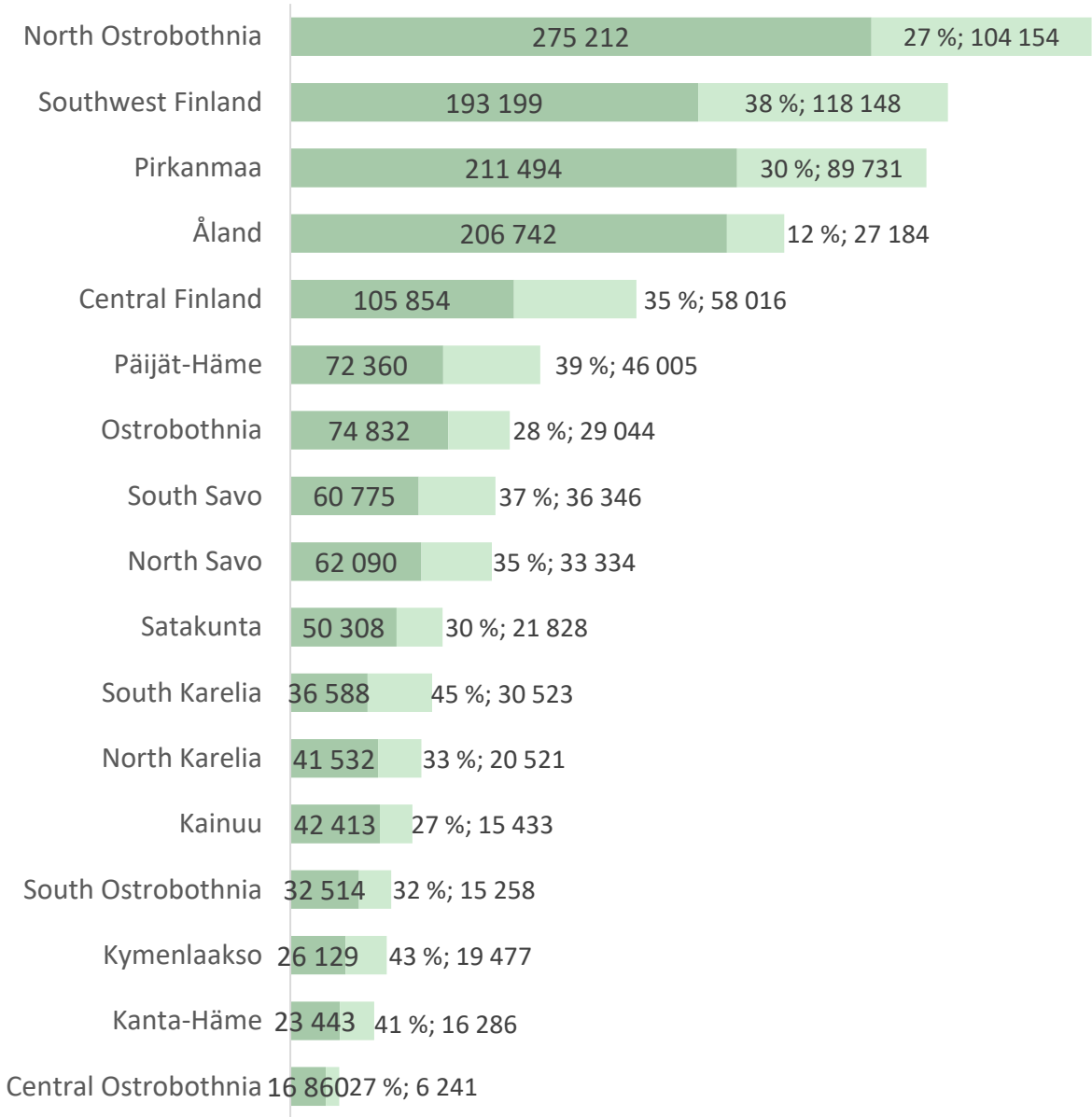


Lapland, foreign overnights in 2024



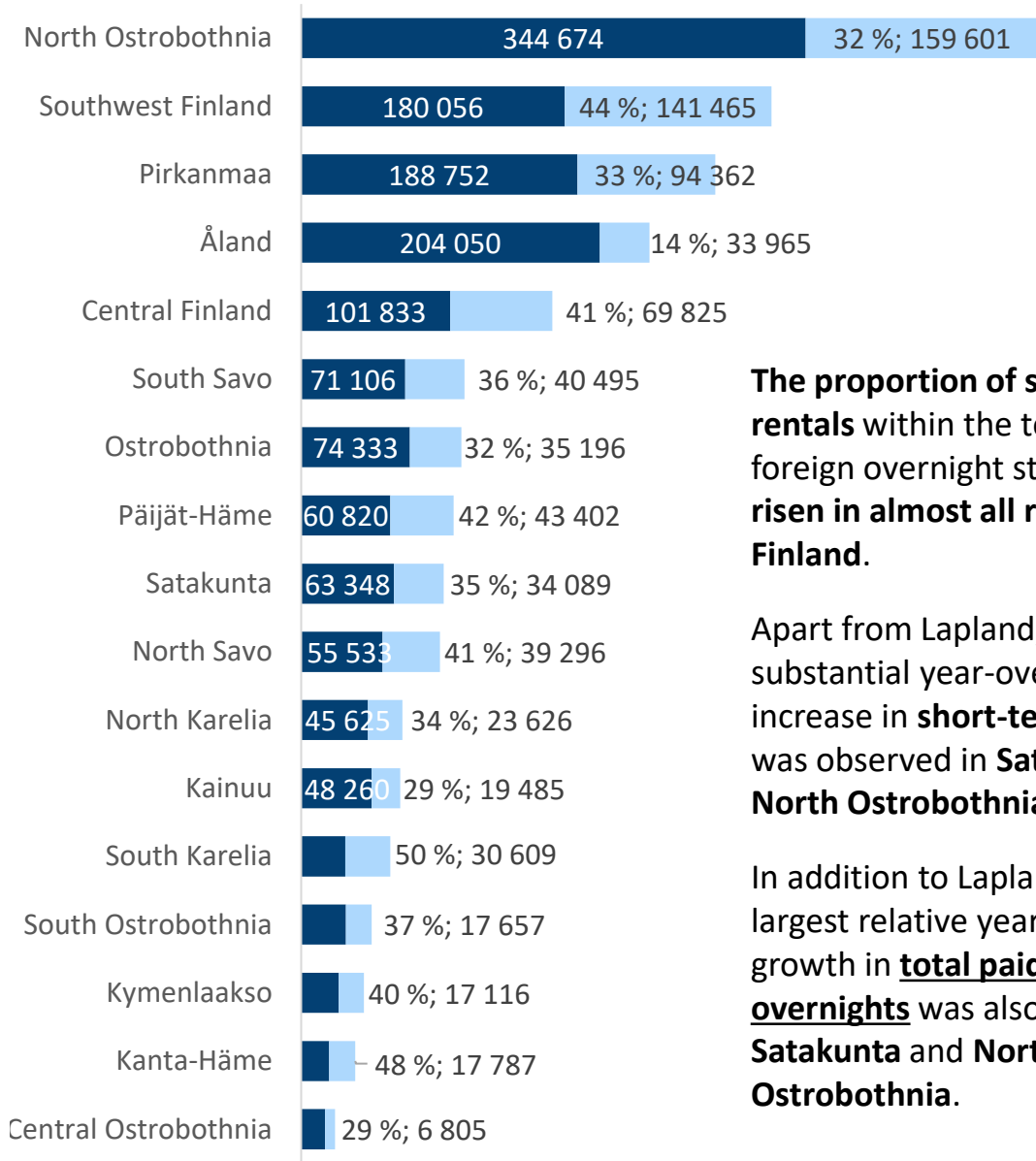
Foreign overnights in other Finnish regions - Year 2023

Registered overnights Short-term rentals overnights



Foreign overnights in other Finnish regions - Year 2024

Registered overnights Short-term rentals overnights

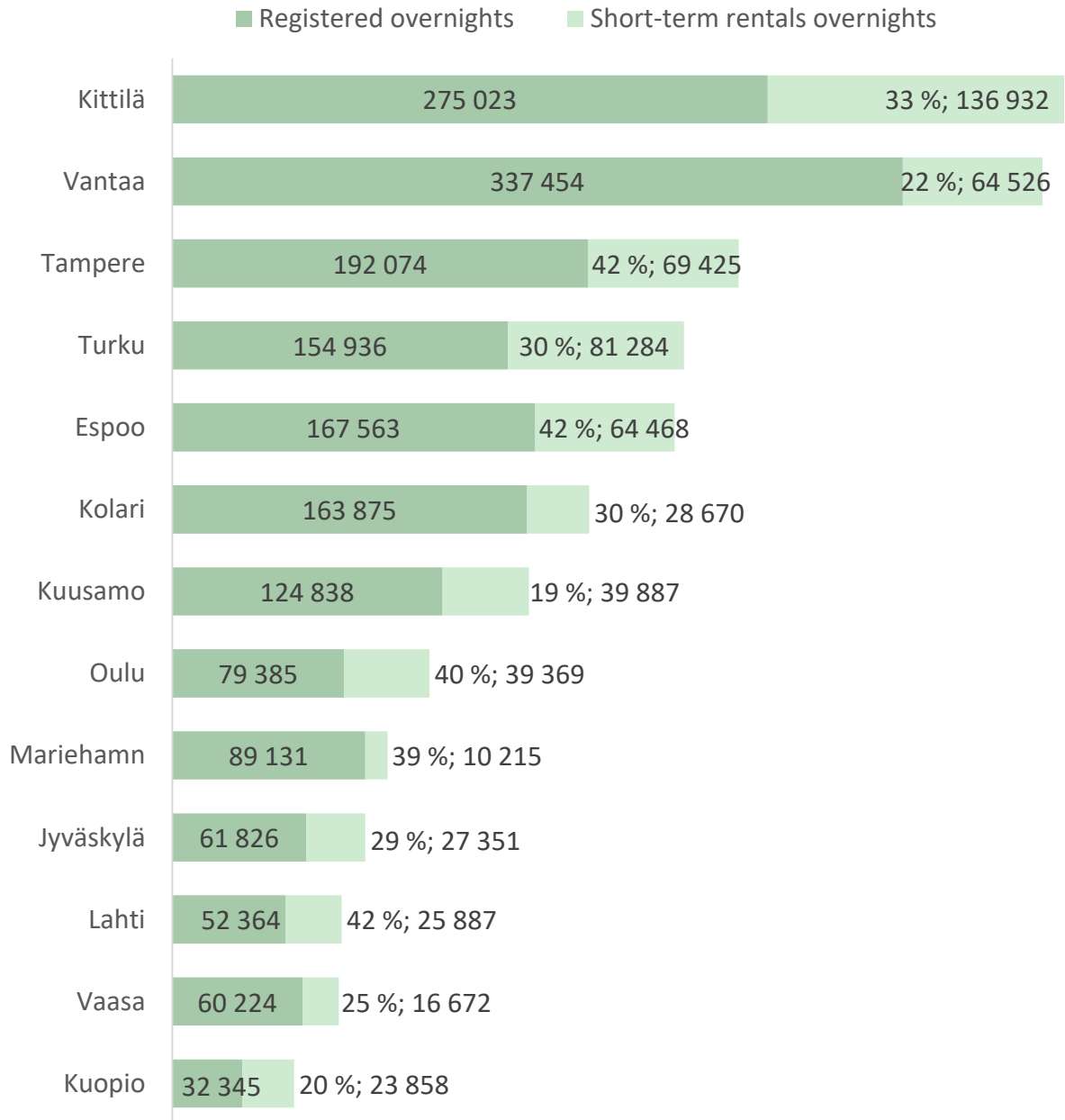


The proportion of short-term rentals within the total paid foreign overnight stays has risen in almost all regions of Finland.

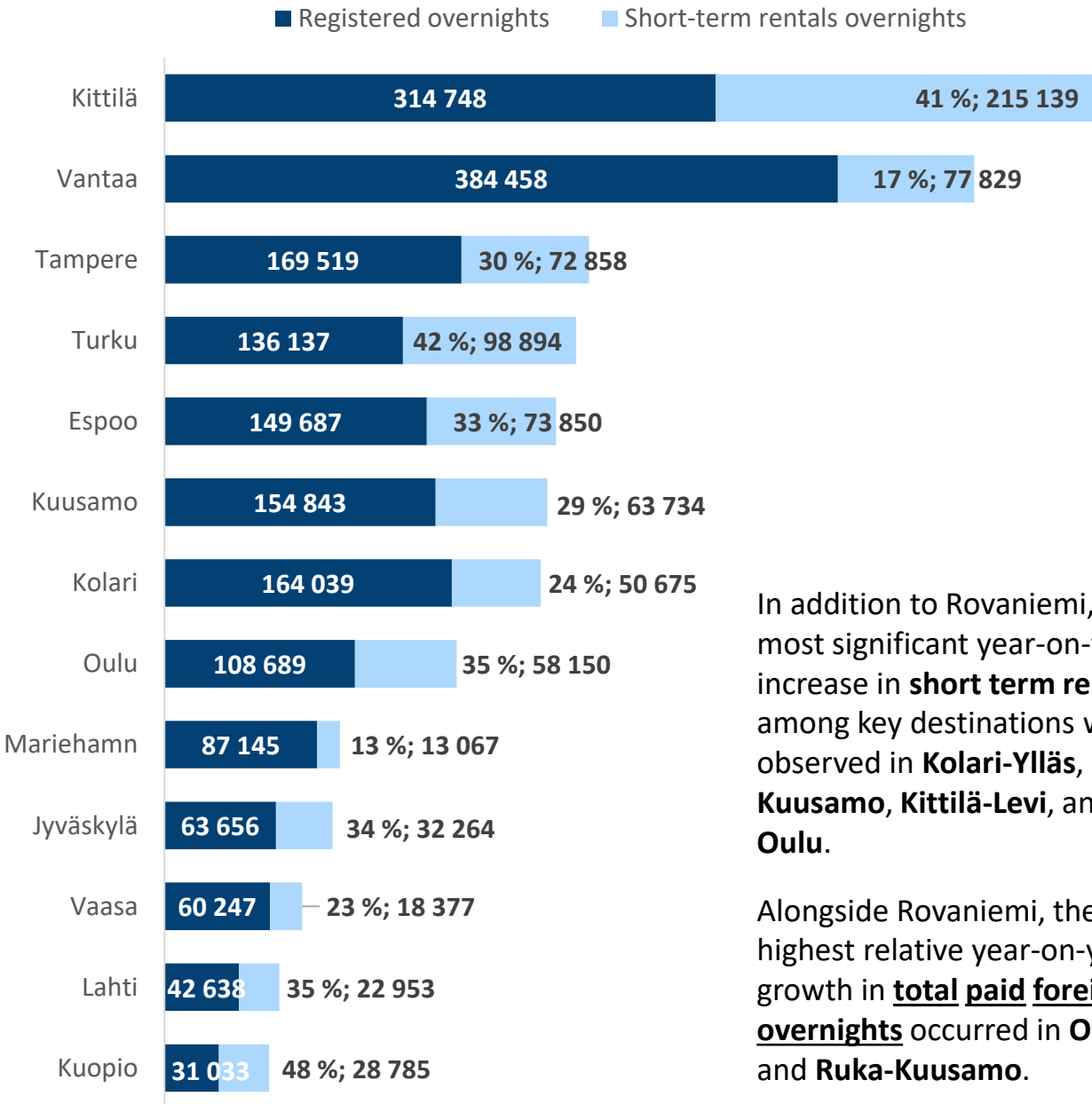
Apart from Lapland, the most substantial year-over-year increase in short-term rentals was observed in Satakunta and North Ostrobothnia.

In addition to Lapland, the largest relative year-over-year growth in total paid foreign overnights was also recorded in Satakunta and North Ostrobothnia.

Foreign overnights in some other Finnish municipalities - 2023



Foreign overnights in some other Finnish municipalities - Year 2024

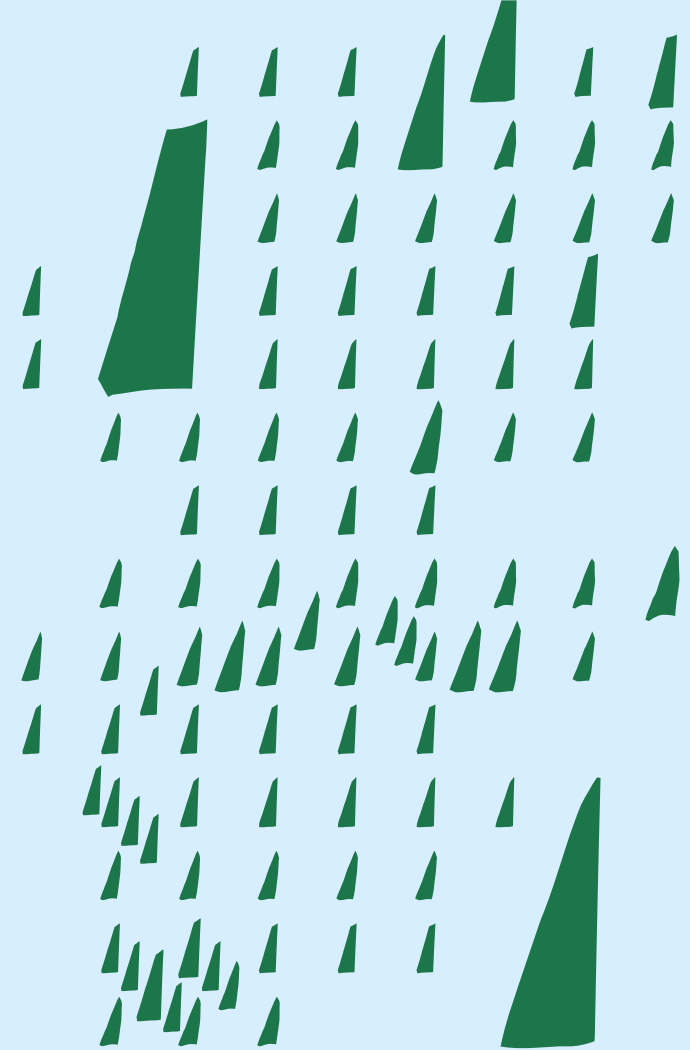


In addition to Rovaniemi, the most significant year-on-year increase in **short term rentals** among key destinations was observed in **Kolari-Ylläs, Ruka-Kuusamo, Kittilä-Levi, and Oulu**.

Alongside Rovaniemi, the highest relative year-on-year growth in **total paid foreign overnights** occurred in **Oulu** and **Ruka-Kuusamo**.

Registered overnights in the Nordics

- Jan-May 2025
 - There were **14.6 million** registered foreign overnight stays in the Nordics excluding Iceland (where the accommodation statistics are undergoing revisions). Overnights **increased by 9%** compared to the same period last year.
 - **Finland's market share** among the four countries was **18%**, so it remained on the same level as during Jan-May 2024.
 - Relative growth during Jan-May 2025 was strongest to **Norway** (+18%) and **Finland** (+13%). Overnights in Denmark and in Sweden increased in both countries by 5%.



MONTHLY TREND

Year
Latest

Year/Month
All

Nordic country
All

Nordic region
WHOLE COUNTRY

Foreign / Domes...
Foreign

Country
All

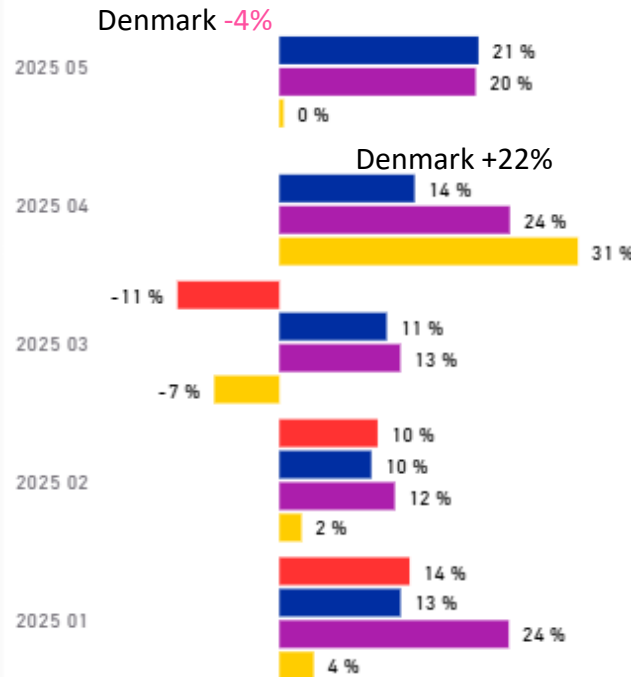
Visit Finland

Menu

YoY change %

WHOLE COUNTRY Foreign 1.1.2025-31.5.2025

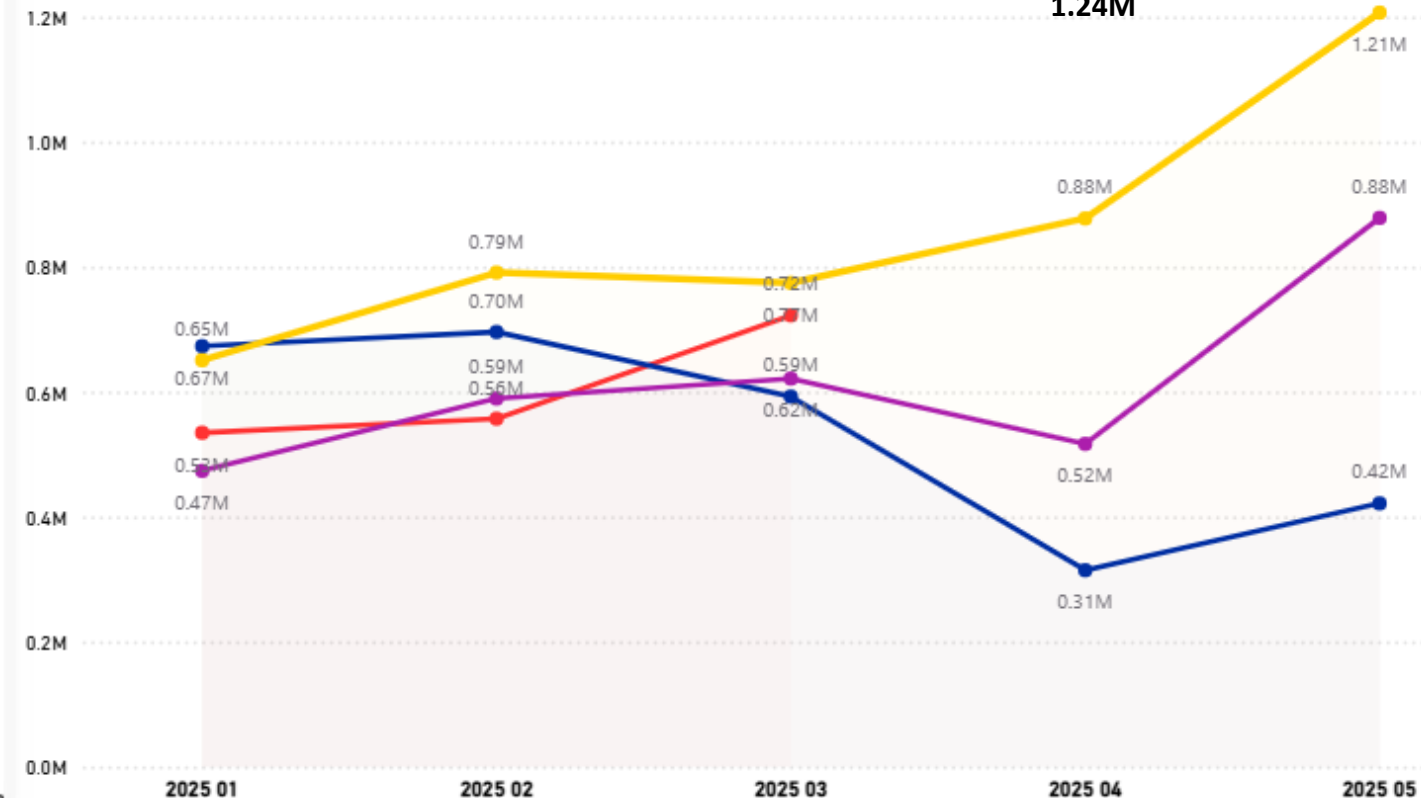
● Denmark ● Finland ● Norway ● Sweden



Monthly overnights

WHOLE COUNTRY Foreign 1.1.2025-31.5.2025

● Denmark ● Finland ● Norway ● Sweden

Denmark
1.47MDenmark
1.24MDenmark
1.21MDenmark
0.88MDenmark
0.42MDenmark
0.88M

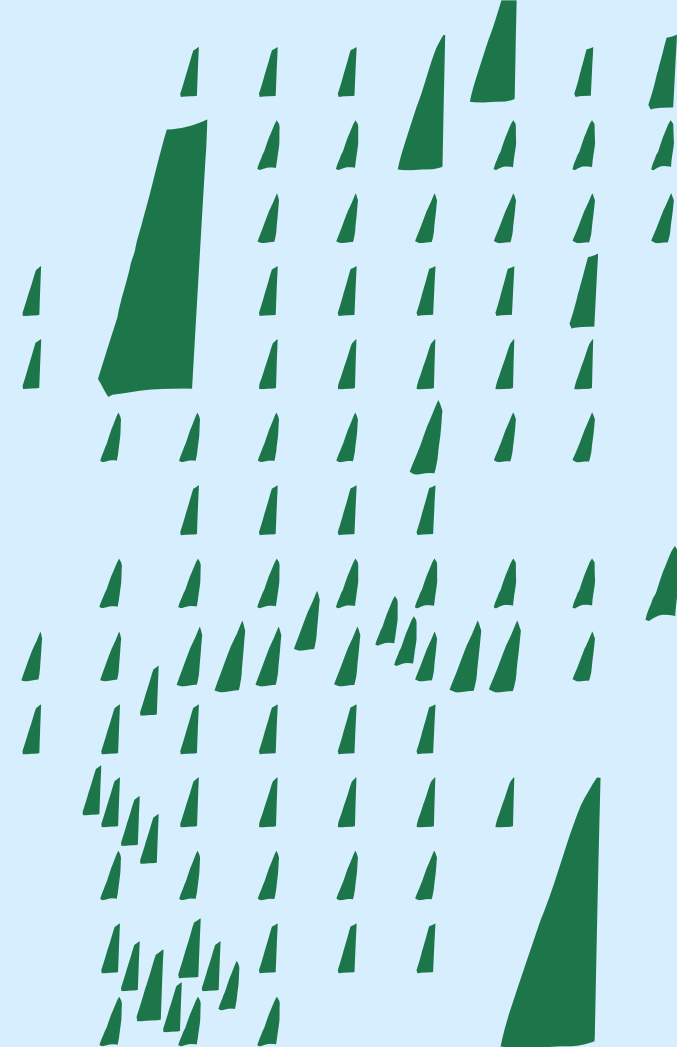
Overnights Jan-May 2025		YoY
Denmark	4.5M	5 %
Sweden	4.3M	5 %
Norway	3.1M	18 %
Finland	2.7M	13 %
Sum	14.6M	9 %

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

In May, the count of foreign overnight stays in the four Nordic countries increased by 5% when compared to the same month in the previous year.

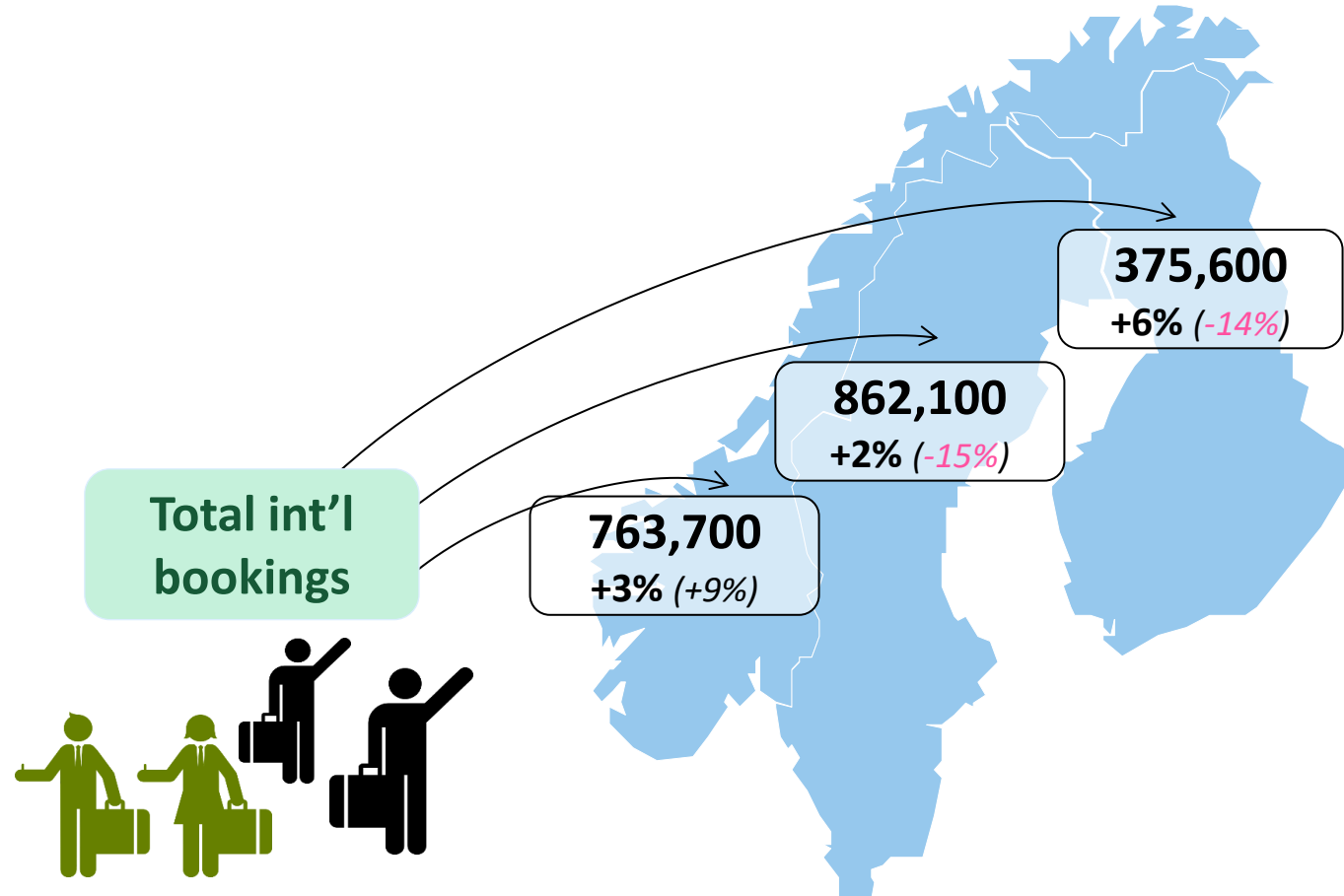
Flight bookings for Jun-Aug 2025

- 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, Spain, and Poland** show **positive development** compared to 2019.*
- Bookings for the summer months to **Norway** are growing when comparing to both previous summer as well as to summer 2019. Bookings to **Sweden** are slightly increasing compared to previous summer, but decreasing compared to summer pre-pandemic.



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

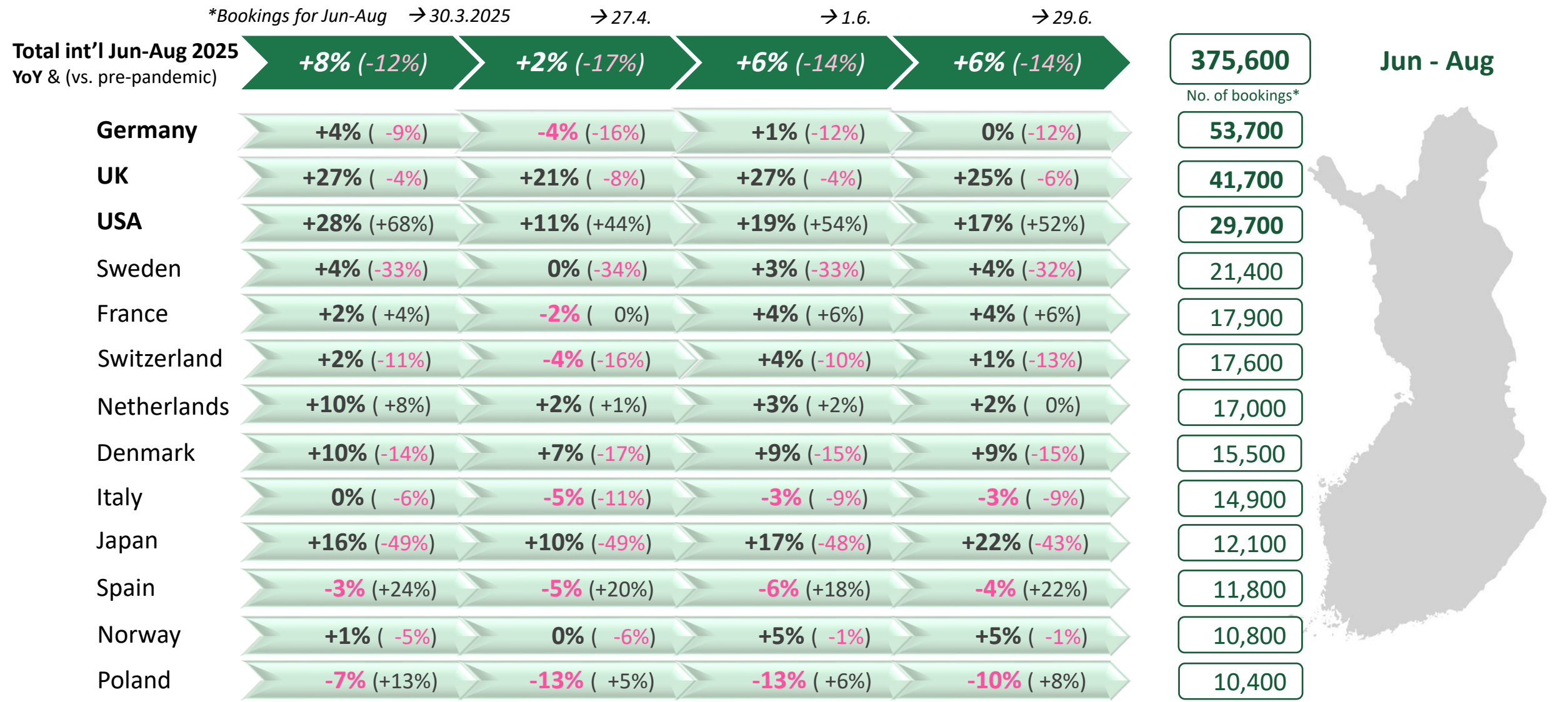
Comparison to previous summer and pre-pandemic



Database update 29-Jun

Follow up on the outlook of flight bookings* to Finland for June – August 2025

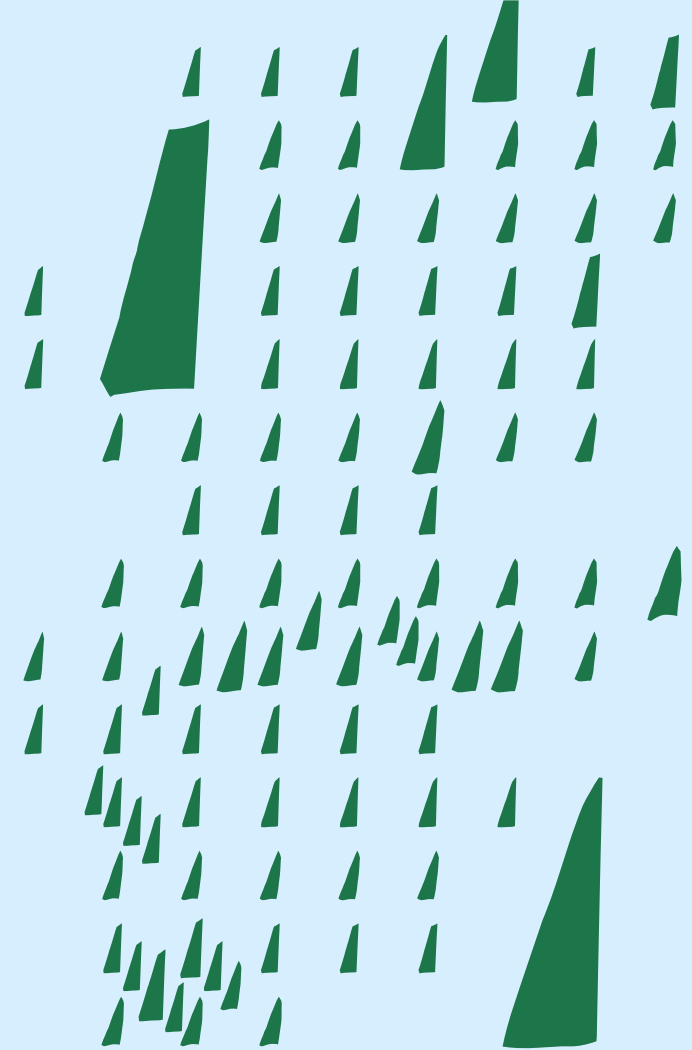
compared to previous year & (pre-pandemic)



Seat capacity on int'l flights

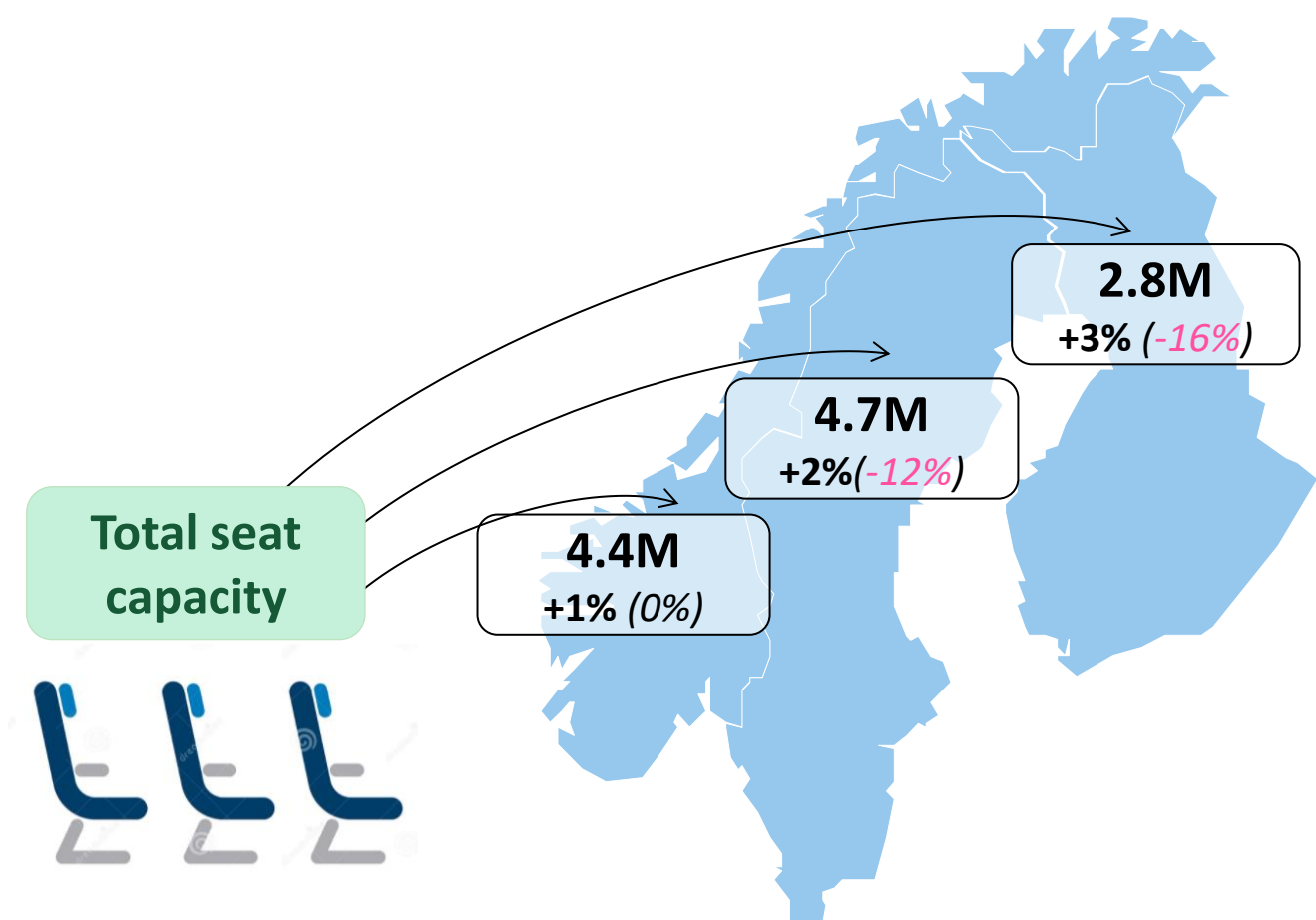
June – August 2025

- **Total int'l seat capacity** for the **summer months** of June – August has slightly decreased compared to the previously planned as the strikes have contributed to several flight cancellations in June. So, at this point total int'l seat capacity to Finland for the summer is **3% above 2024 level**, *but 16% below the pre-pandemic level*.
 - As the flight cancellations have affected mainly the European flights, seat capacity from **Europe** in June remained at the same level as in June 2024. However, for the summer season seat capacity should improve by 1% compared to the previous summer season.
 - Seat capacity from **Asia** is improving by 10% compared to previous summer *but remains 38% 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

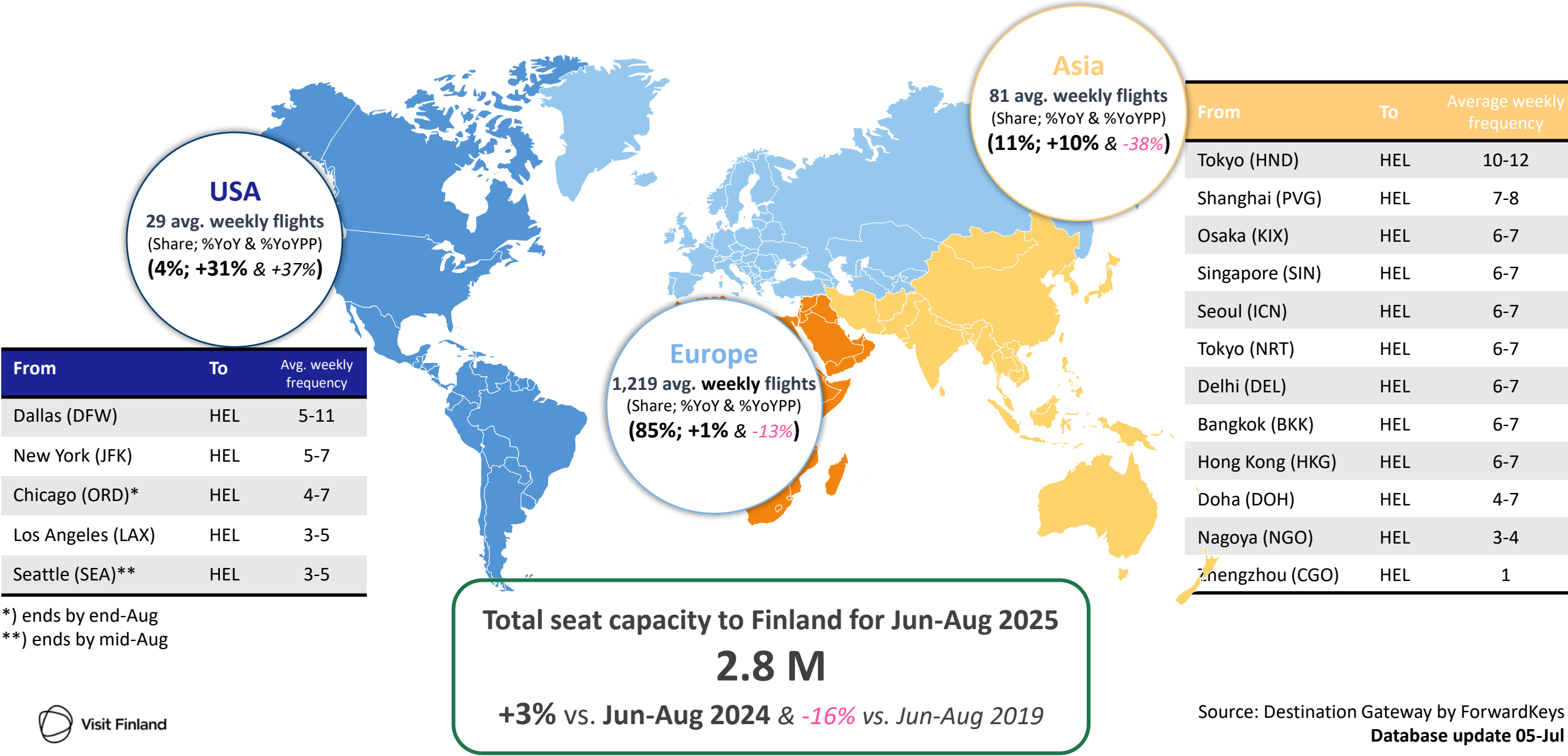
Comparison to previous summer and pre-pandemic



Database update 05-Jul

Direct int'l flights to Finland Jun-Aug 2025

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



EUROPE to Finland / Jun – Aug 2025

From (selected countries)	Share	Seat capacity compared to 2024	Seat capacity compared to 2019
Germany	12%	-2%	-17%
Sweden	10%	-5%	-25%
UK	8%	+24%	-15%
Spain	7%	-5%	-21%
Italy	6%	-6%	+22%
Greece	6%	-5%	+12%
Denmark	6%	+5%	-17%
Latvia	5%	+16%	+48%
France	5%	0%	-6%
Netherlands	4%	0%	+2%
Poland	4%	-11%	-4%
Norway	4%	-3%	-16%
Turkiye	4%	+15%	+31%
Estonia	3%	+2%	+33%
Switzerland	2%	-4%	-6%
Croatia	2%	-4%	-18%

Top10 airlines operating
from Europe to Finland

+0.8%
YOY for selected airlines

