



VF monthly follow-up

June 2025

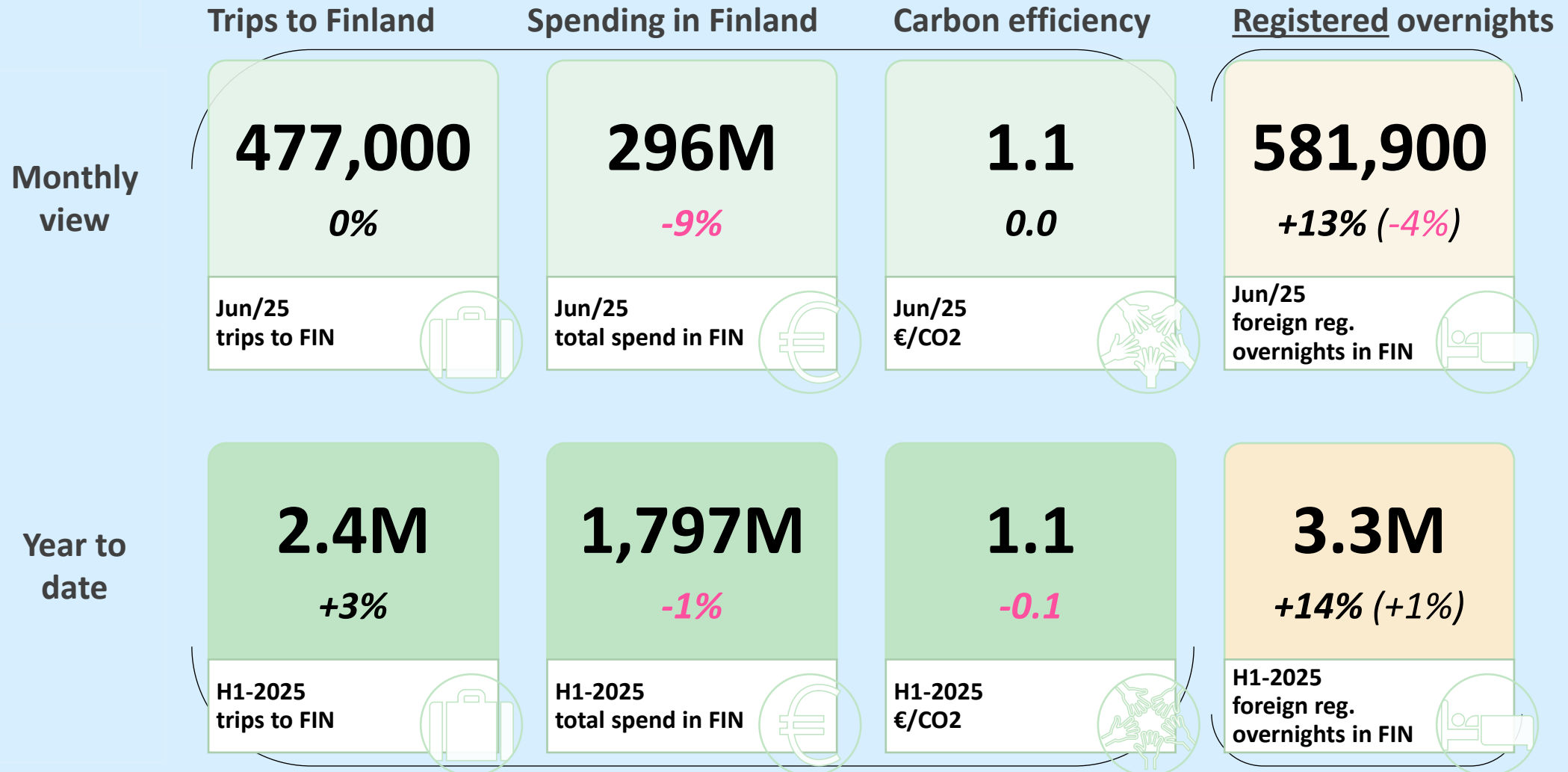
Summary

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

- Between July 2024 and June 2025, the **number of visitors** to Finland **rose by 3%** compared to the previous period from July 2023 to June 2024. **Leisure travel increased by 8%**, while **business travel declined by 7%**. Consequently, **leisure visitors' spending grew by 4%**, whereas **business travellers' expenditure fell by 25%** relative to the prior 12-month period.
- During the first half of 2025, **registered foreign overnight stays increased by 14%** compared to H1-2024. The top source markets were **Germany, France, the UK, the USA, the Netherlands, and Sweden**.
- Recent figures on **short-term rentals** show a **steady increase in usage throughout 2024 and into the first quarter of 2025**. Depending on the market of origin, short-term rentals can account for between 16% and over 40% of total paid overnight stays.
- The **Nordic region** saw **strong growth in registered foreign overnight stays** during the first half of 2025.
- The **forecast for total international flight arrivals** in Finland for the summer months of **June to August** has become **more negative** compared to earlier predictions, mainly due to multiple flight cancellations in June and July caused by industrial actions. The current outlook indicates a **2% decline in summer arrivals** compared to last year.
- Looking ahead, the **Oxford Economics forecast** predicts solid growth in foreign overnight stays and spending in Finland over the next decade. The projection indicates that by 2034, **spending will almost double** and **overnight stays will rise by 63%** compared to 2024.

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

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



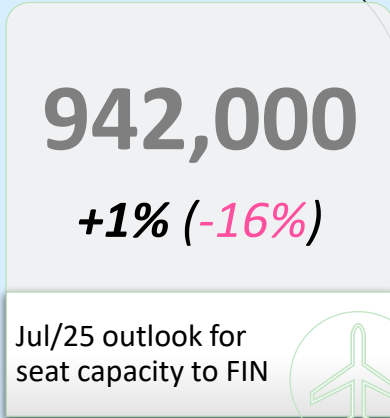
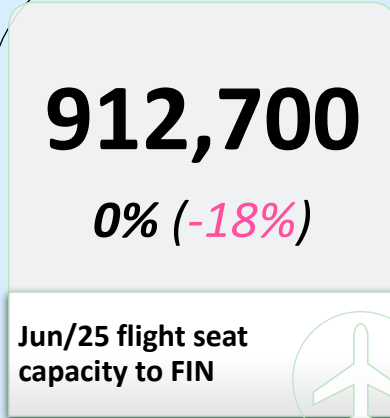
Int'l Flight Bookings & Seat Capacity to Finland

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

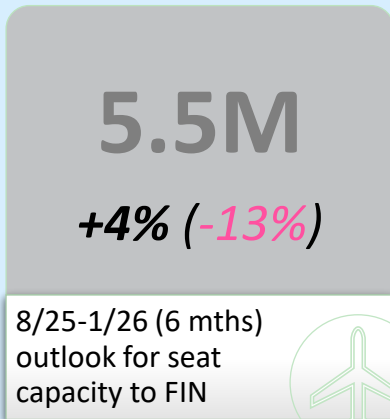
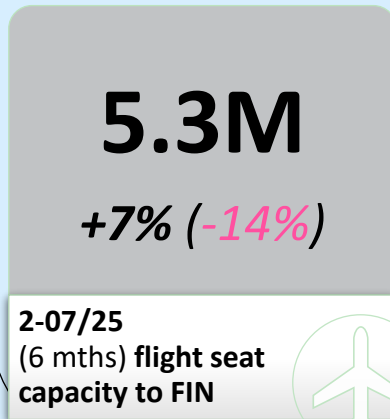
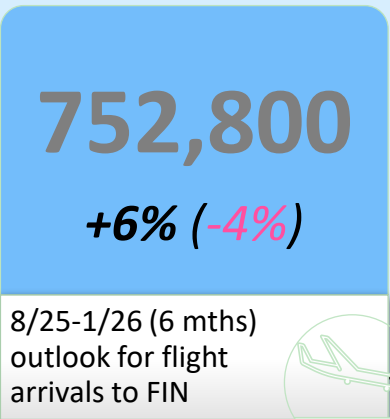
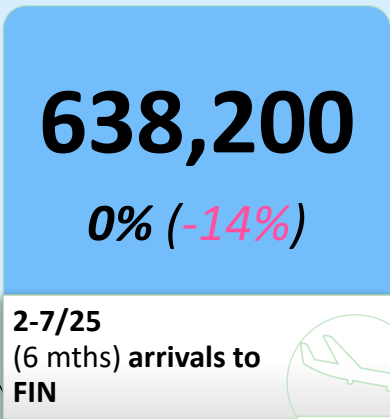
Flight arrivals / outlook for arrivals*

Seat capacity

Monthly
historical
& forecast
view



6 months'
historical
& forecast
view



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

Border Survey

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

Foreign travellers made **nearly 5 million trips to Finland**, a **3% increase** compared to Jul/2023 – Jun/2024. However, total spending in Finland was **3.7 billion euros**, marking a **6% decrease**. Relative increase in day trips was bigger than the increase in overnight trips and the median length of stay of holiday travellers was shorter, so these were some of the reasons leading to **fewer overnight stays in Finland**.

- **90% of trips were overnight stays**, slightly down from 91% previously.
- **Leisure travel** constituted **76%** of all trips, **increasing by 8%**, with leisure traveller **spending rising by 4%**.
- **Work-related trips** made up **24%** of all trips, but these **decreased by 7%**, and **spending by business travellers dropped sharply by 25%**.

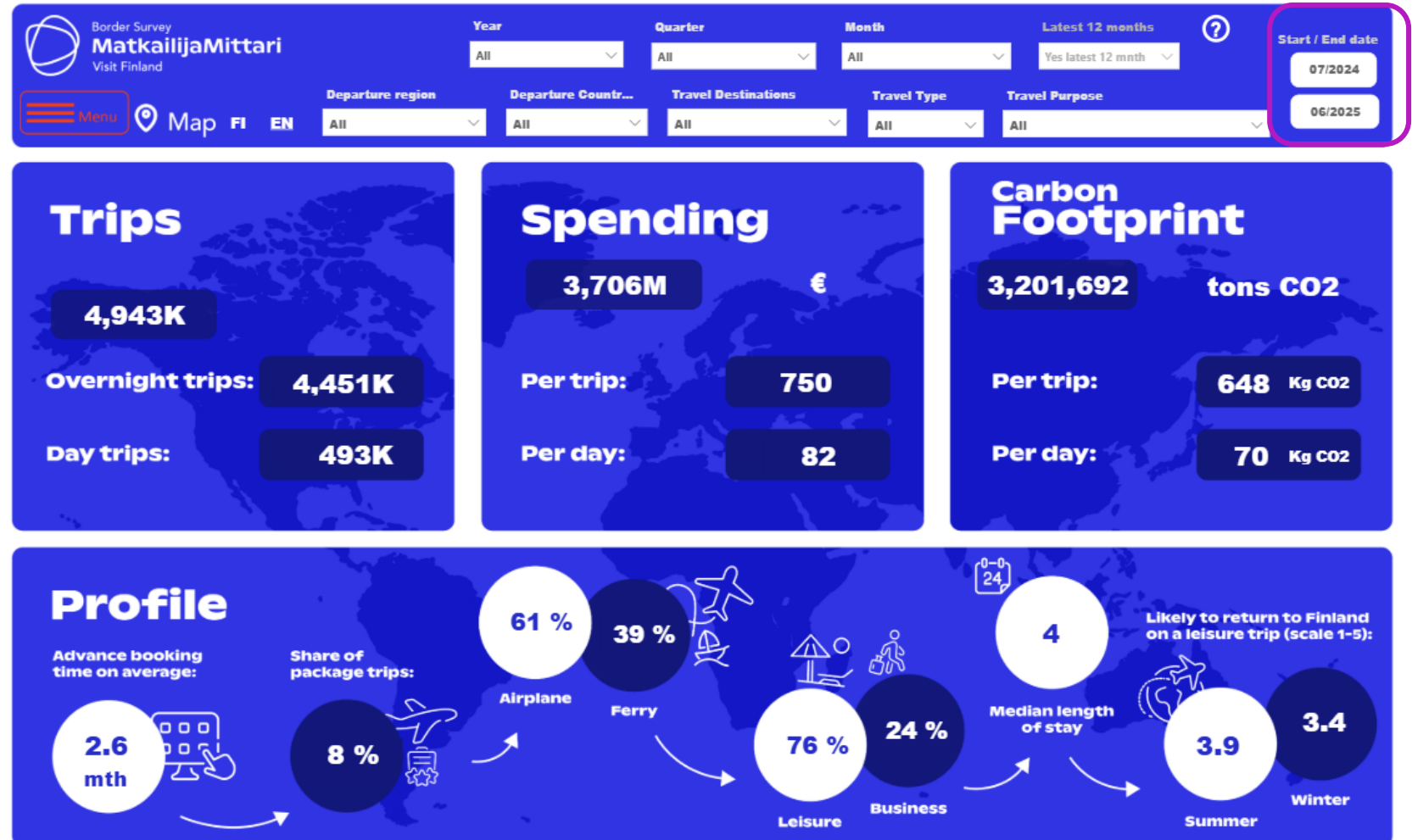
Half of all travellers were on a **holiday trip**, while **20% visited friends or relatives**. Holiday travel increased compared to the previous period, whereas visits to friends and relatives declined.

Business travel overall decreased, except for attendees of conferences, congresses or trade fairs, whose numbers increased.

Daily spending by **holiday travellers** increased by 14%, averaging 134 euros per day, though shorter trip durations slightly reduced their average spending per trip. Among **business travellers**, those attending conferences, congresses, or trade fairs spent the most, averaging 136 euros per day.

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

- **Nearly 5 million visitors** (YoY +3%)
 - 90% overnight trips
- Spending **3.7 billion€** (YoY -6%)
 - 750 € / trip (YoY -8%)
 - 82 € / day (YoY +11%)
- **76%** travelling for **leisure** (YoY +8%)
- 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 (Jul 2024 – Jun 2025)

Foreign visitors in Finland

[Link to the report:](#)

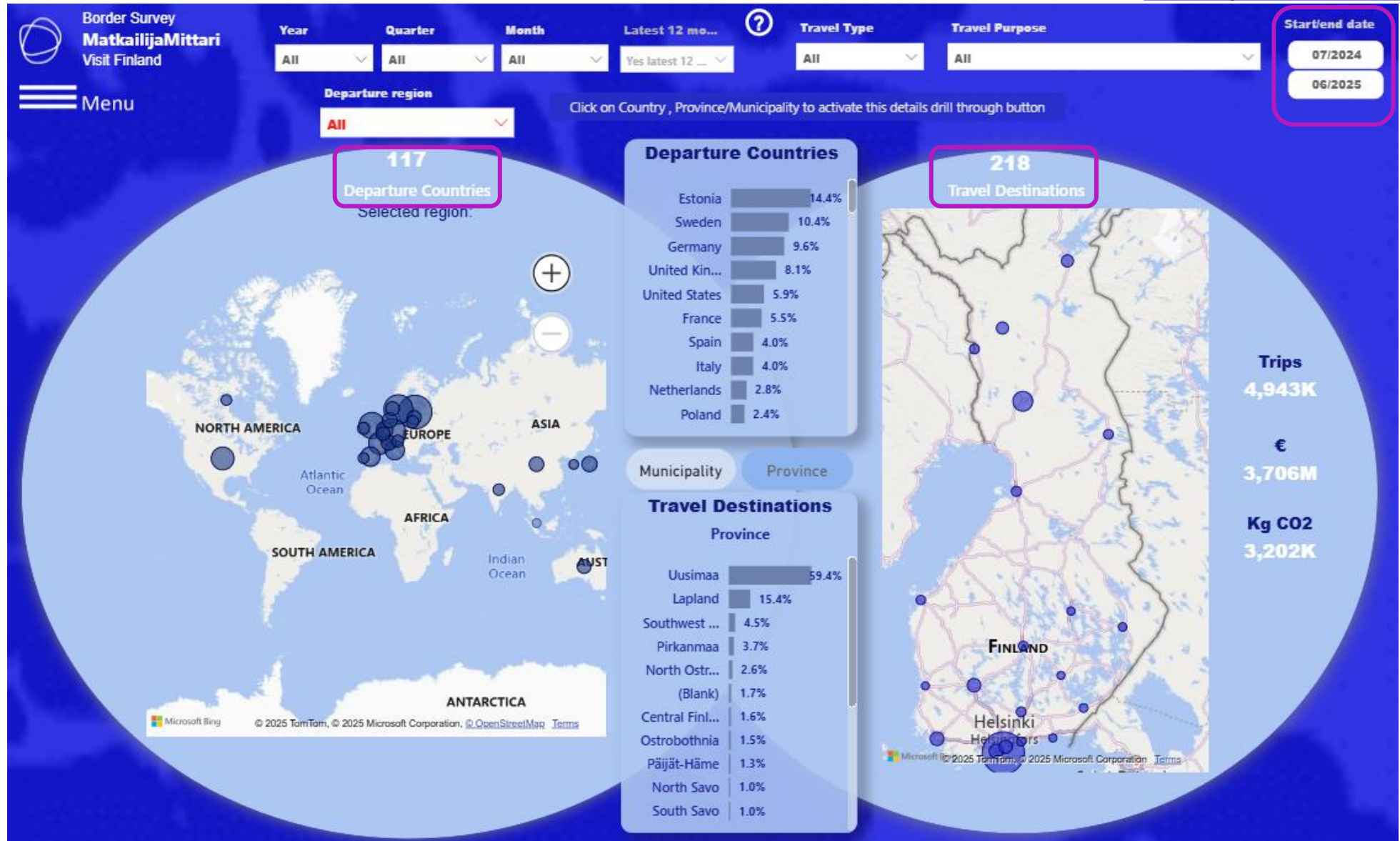
[Matkailijamittari - Visit Finland](#)

Top5 source markets for leisure/personal trips

- Sweden
- Estonia
- Germany
- UK
- USA

Top5 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Poland



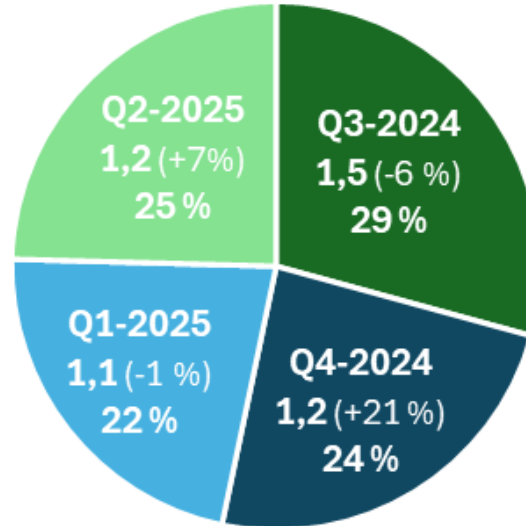
Quarterly Review – Latest 12 Months (July 2024 – June 2025)

Most foreign travellers visited Finland during Q3, while spending peaked in Q4 and Q1

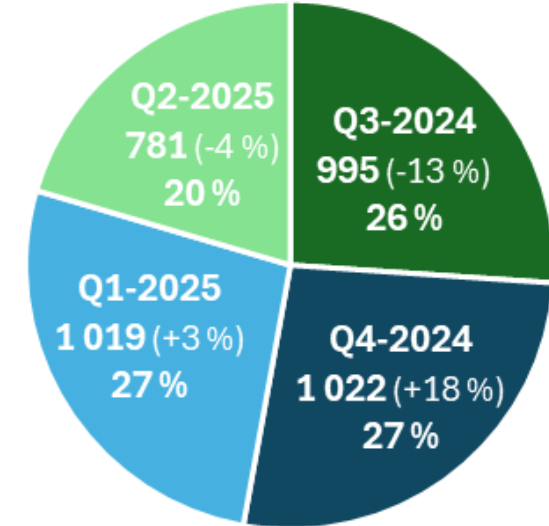
In the latest 12 months, the largest number of foreign travellers visited Finland during July–September 2024. However, the total amount of money spent by travellers was highest during October–December 2024 and January–March 2025, and during these quarters, overall spending also increased compared to previous years' corresponding quarters.

- Leisure travel to Finland saw an increase in trips and spending, except during Q3-2024. Leisure travellers' spending per trip and per day was highest in Q1, and winter season bookings were made almost a month earlier than summer bookings.

Trips to Finland (million)
07/2024 - 06/2025



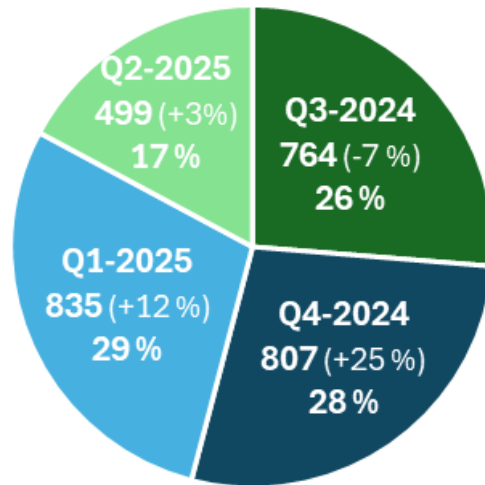
Spending in Finland (M€)
07/2024 - 06/2025



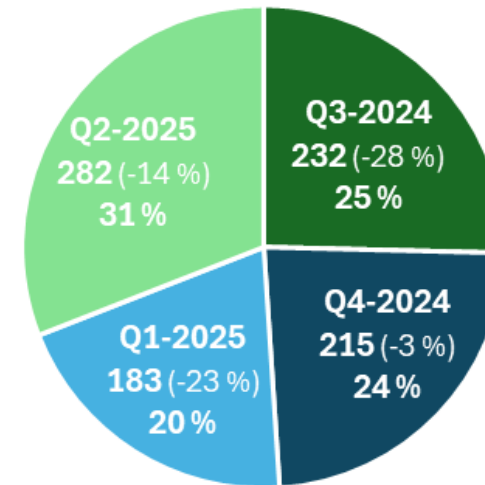
Quarterly Review – Latest 12 Months (July 2024 – June 2025)

- **Leisure travel** to Finland saw an **increase in trips and spending**, except during Q3-2024.
- Leisure travellers' spending per trip and per day was **highest in Q1**.
- Bookings for the winter months were made almost one month earlier than for the summer trips.
- In contrast, **business travel decreased** in Q3-2024 and during the first half of 2025, with a significant drop in spending.
- Business travellers' **daily spending was fairly consistent throughout the year**, peaking in Q1-2025 (€79/day) and lowest in Q3-2024 (€61/day).
- There were **fewer departure countries and destinations** in Finland for business travellers compared to leisure travellers.

Leisure: Spending in Finland (M€)



Business: Spending in Finland (M€)



Registered Overnights

• H1-2025

- The number of registered foreign overnights reached **3.3 million**, marking an **14%** increase from the previous year.
- The leading source markets during the first half of year 2025 were **Germany, France, UK, USA, the Netherlands, and Sweden**.
- Overall accommodation revenue increased by **7%**, with **foreign revenue rising by 20%** and domestic revenue remaining the same as in H1-2024. **Foreign revenue accounted for 39%** of the total accommodation revenue, while **foreign overnights accounted for roughly 30%** of total overnights.

• June 2025

- Total foreign overnights reached **581,900** in June (**+13% YoY**, & **-4%** compared to June 2019).
- Leading source markets in June were **Germany, USA, UK, and Sweden**.
- **Over half** of registered foreign overnights took place in **Helsinki**, and the number of overnights marked a new record for June with 285,000 foreign overnight stays.
- Several **major congresses** took place in **Helsinki** this June. In addition, the **Finnish Air Force hosted the multinational Atlantic Trident 25 exercise** in Finland. These events brought **nice growth in overnights from several source markets** especially in **Helsinki** as well as in **Tampere, Rovaniemi, Kuopio, and Jyväskylä** where the Atlantic Trident air exercise took place.

Statistics Finland did not receive Åland's June statistics in time, so they had to supplement the figures for the Coastal Archipelago and overall totals using their own statistical methods. Thus, in the Rudolf database table, these estimates are included even though Åland's own statistics are missing.

Instead, the PBI Monthly Accommodation statistics report does not contain those estimates for the Coast & Archipelago area or the totals, so the figures in the PBI report are consistently too low. The correct figures for June will only be updated together with the July statistics, that is, on August 28.

Registered overnights H1-2025

	H1- 2025	Change-% vs. H1-2024	Change-% vs. H1-2019
Total	10.6M	+2%	0%
Domestic	7.3M	-2%	0%
Foreign, total	3.3M	+14%	+1%
Foreign excl. Russia	3.3M	+14%	+15%
Scandinavia	342,700	0%	-9%
EU-27 + UK	2.0M	+9%	+17%
America	305,900	+18%	+52%
Asia	507,000	+40%	-5%



Main source markets

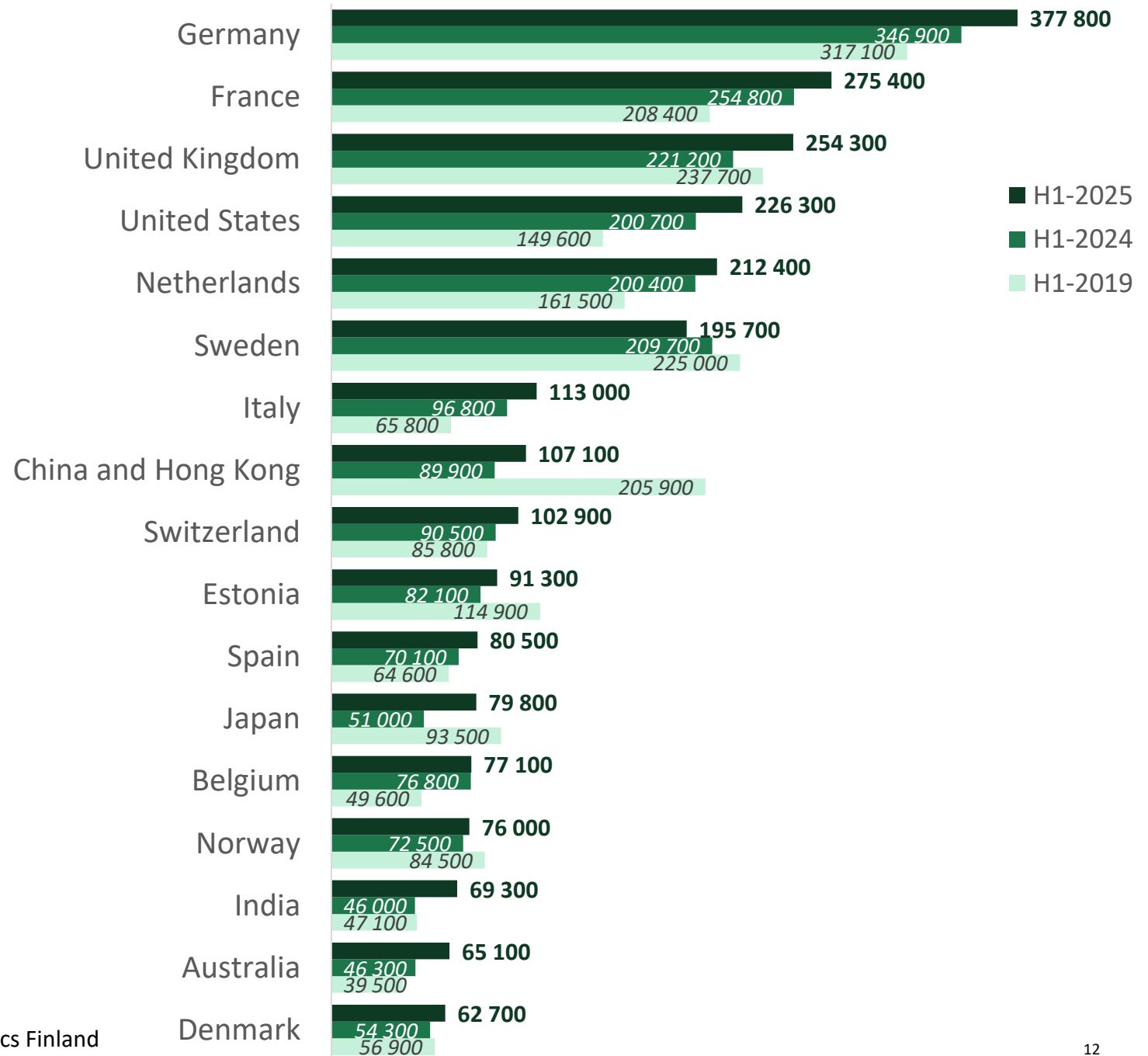
H1-2025

vs. H1-2024 & H1-2019

During the first half of 2025, **Germany** was clearly the leading source market in terms of **registered overnights**. The other main source markets were **France, UK, USA, the Netherlands, and Sweden**.

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

In comparison to H1-2019, overnights from Sweden (-13%), China including Hong Kong (-48%), Estonia (-21%), Japan (-15%), and Norway (-10%) continued to fall short of pre-pandemic figures.



Registered foreign overnights increased by 13% in June

June 2025

581,900 total foreign overnights;
+13% vs. 06/2024, **(-4%** vs. 06/2019)

580,500 foreign excl. Russia; **+13%**, (+5%)

328,900 EU+UK; **+11%**, (+2%)

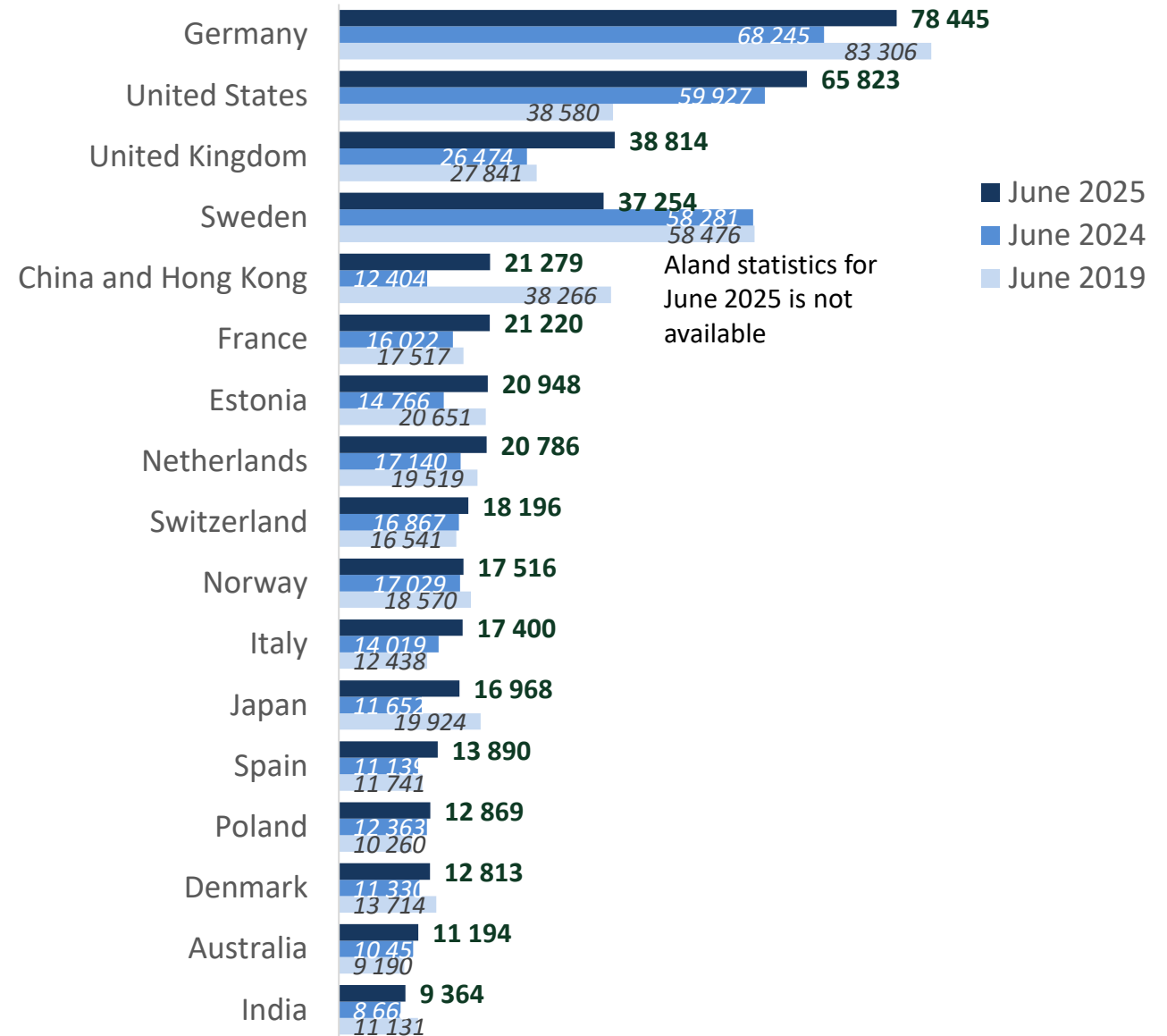
86,400 America; **+17%**, (+63%)

78,800 Asia; **+36%**, **(-18%)**

69,700 Scandinavia; **-21%**, **(-25%)**

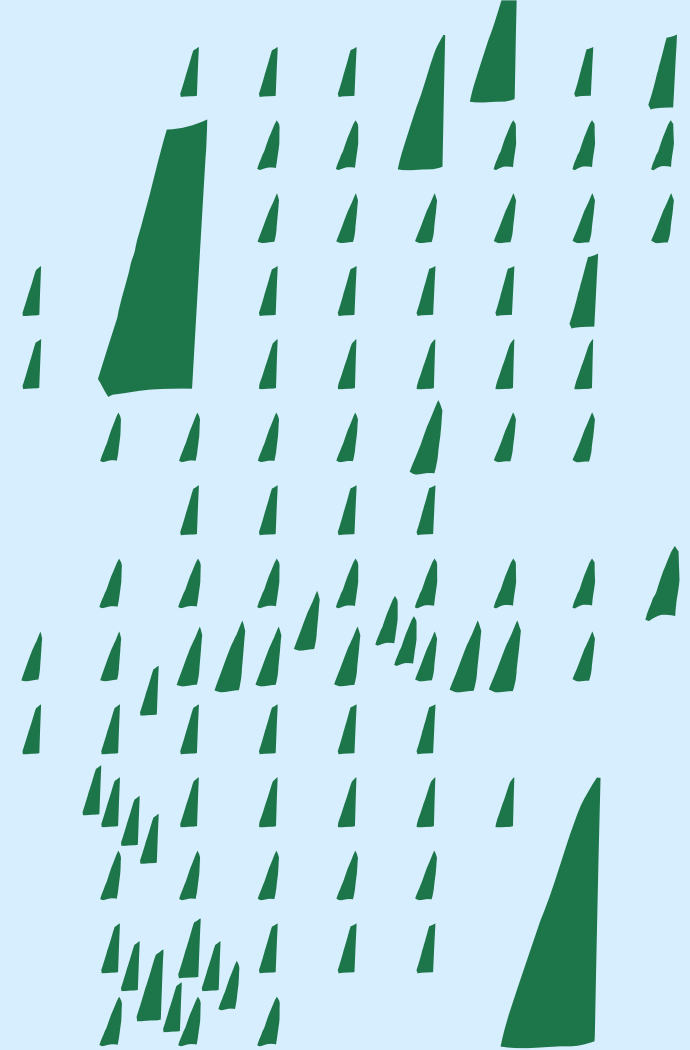
Top destinations for total foreign;
vs. 06/2024, (vs. 06/2019)

- **285,000 Helsinki**; **+15%**, (+14%)
- 50,000 Vantaa, **+36%**, (+4%)
- 23,900 Tampere, **+54%**, (+19%)
- 17,700 Rovaniemi, **+19%**, **(-18%)**
- 17,500 Espoo; **+2%**, **(-13%)**
- 16,500 Turku; **-7%**, **(-10%)**



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%**.

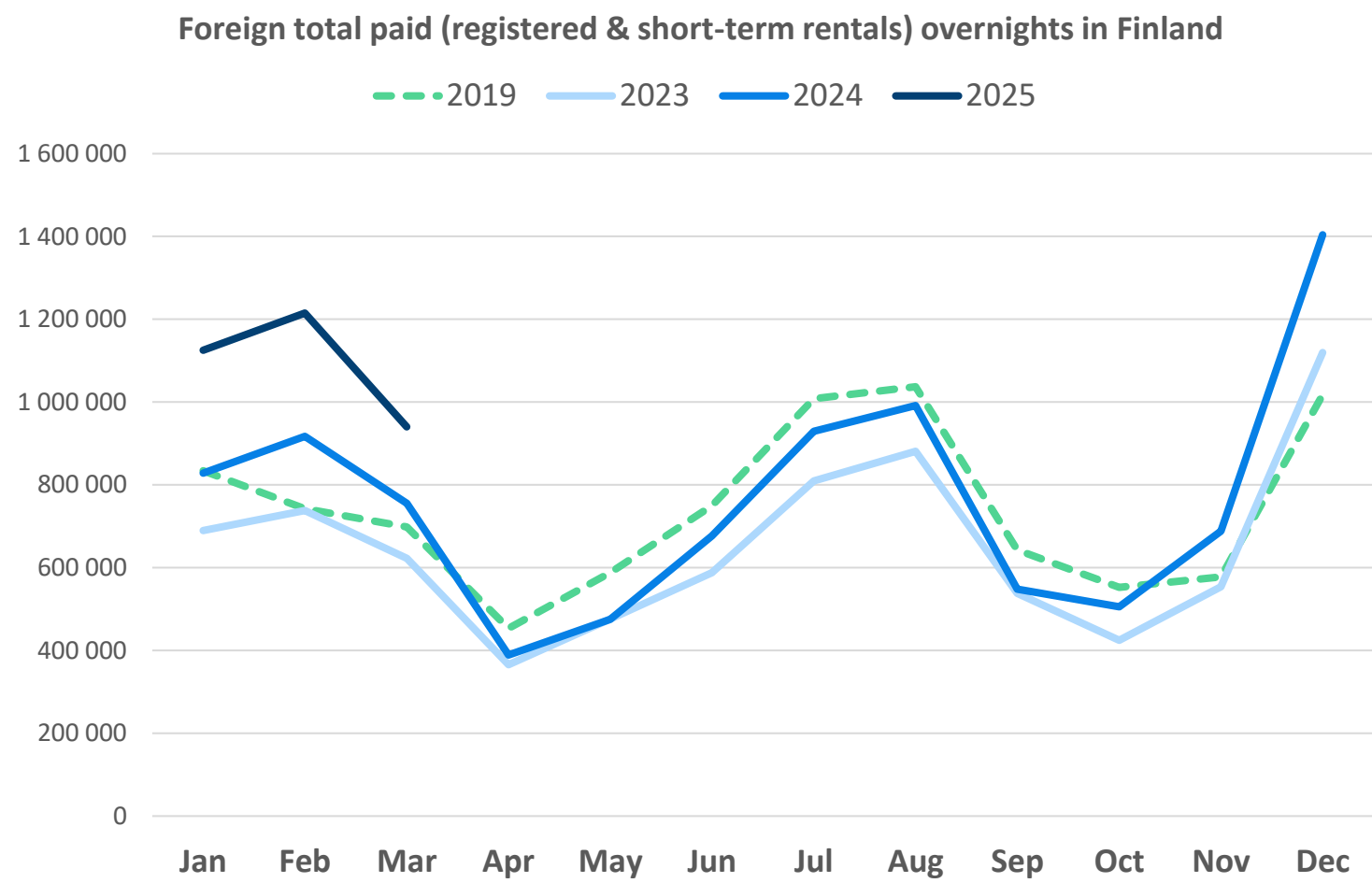
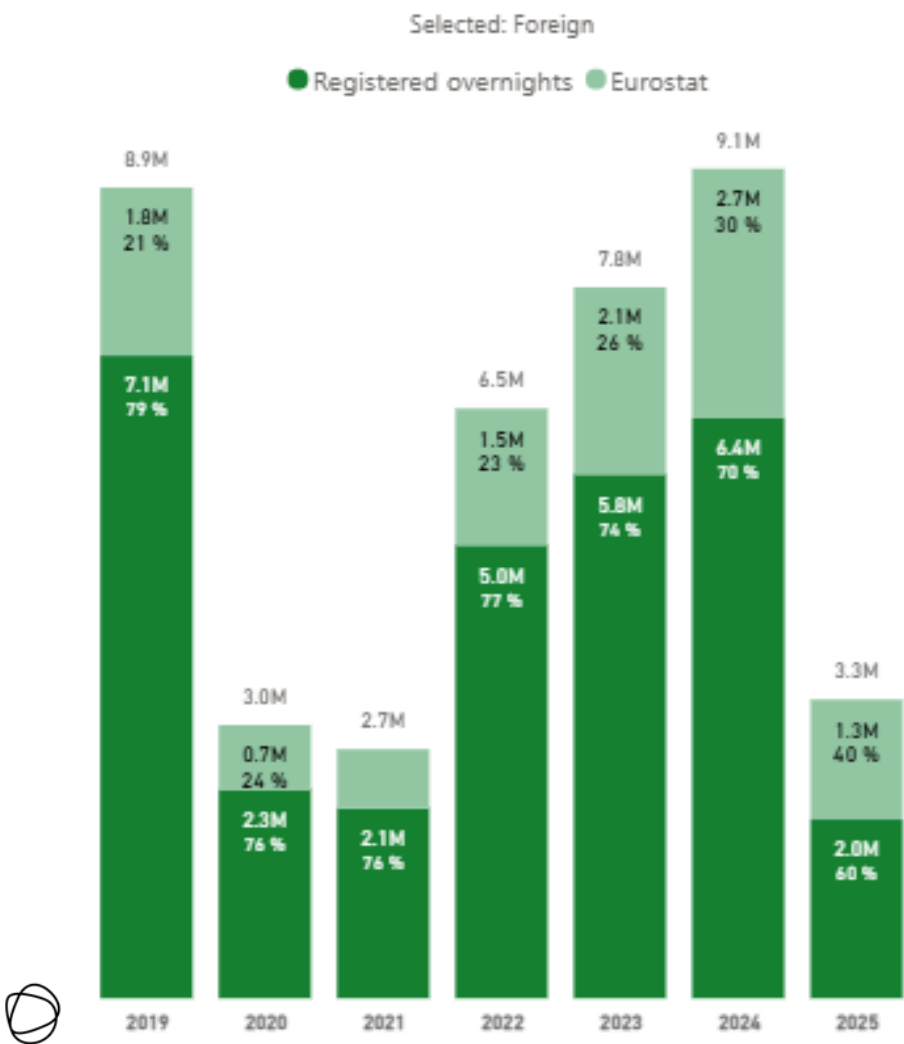


Monthly foreign total paid overnights in Finland

(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.



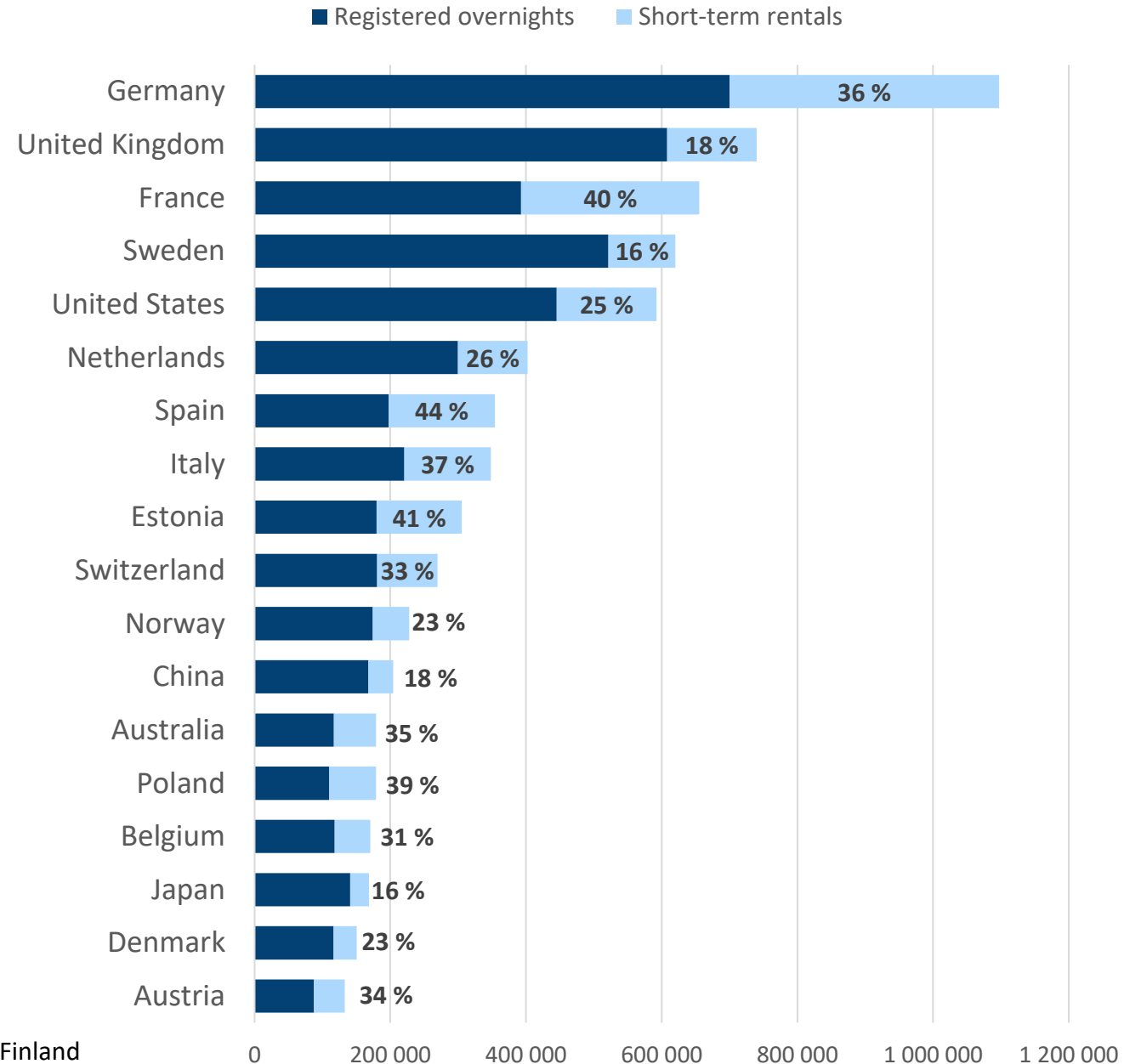
Registered and short-term rentals overnights in Finland Year 2024

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



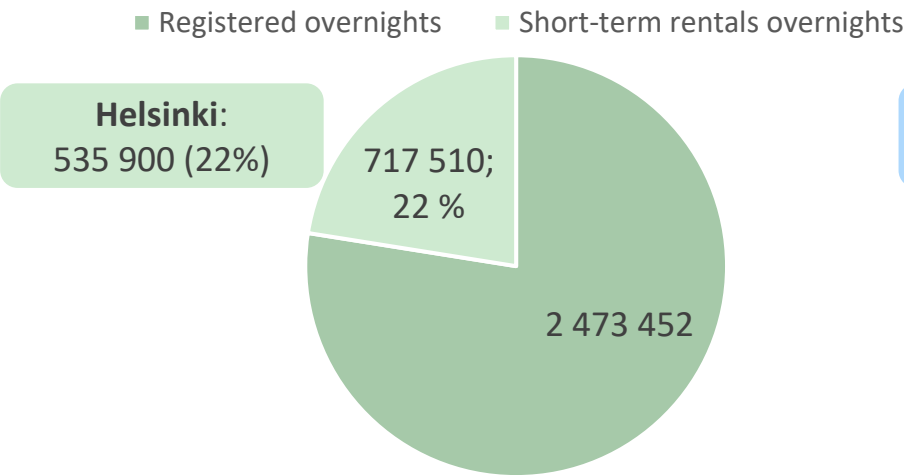
Registered and short-term rentals foreign overnights in Uusimaa & Lapland 2023-2024

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**.

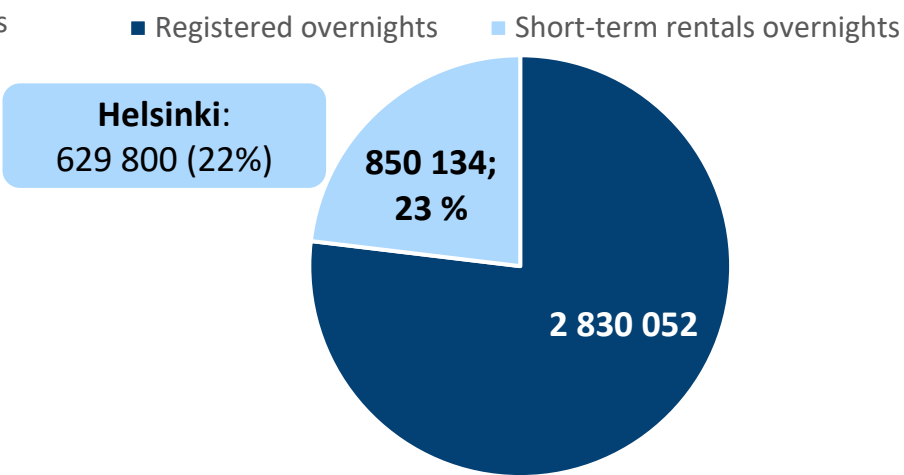
The **annual growth rate** for overnight stays in **short-term rentals in Lapland** reached **64%**, while in **Rovaniemi**, it soared to **69%**.

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.

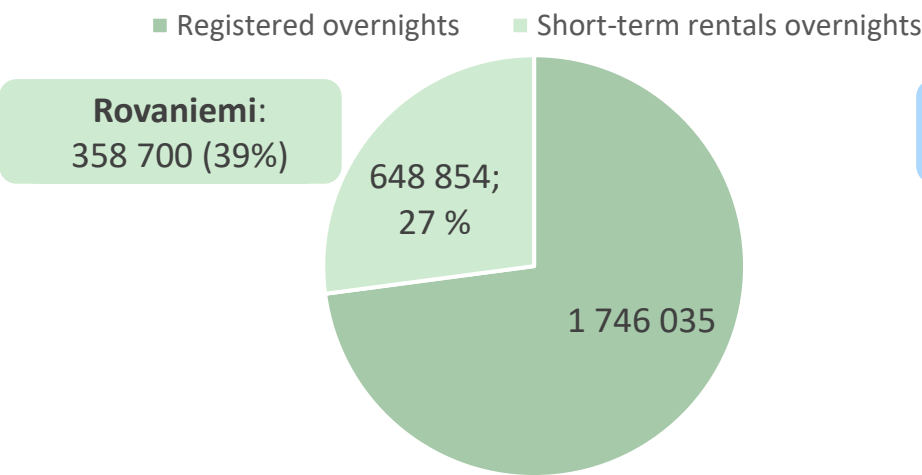
Uusimaa, foreign overnights in 2023



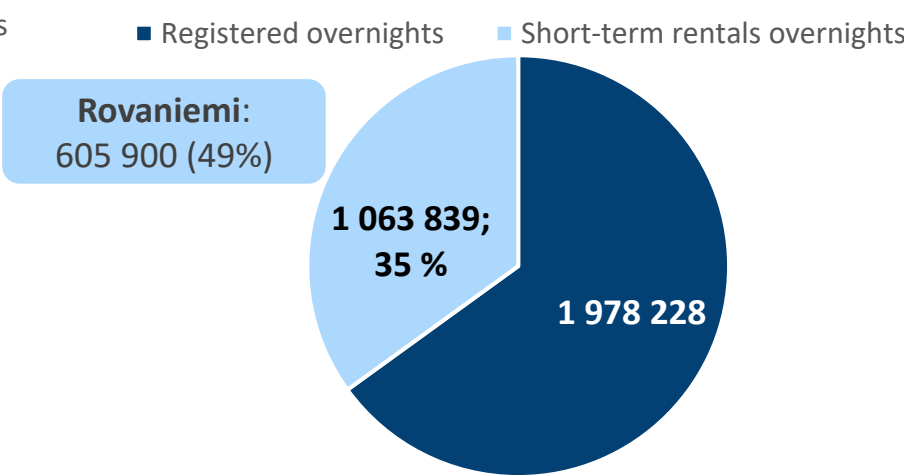
Uusimaa, foreign overnights in 2024



Lapland, foreign overnights in 2023

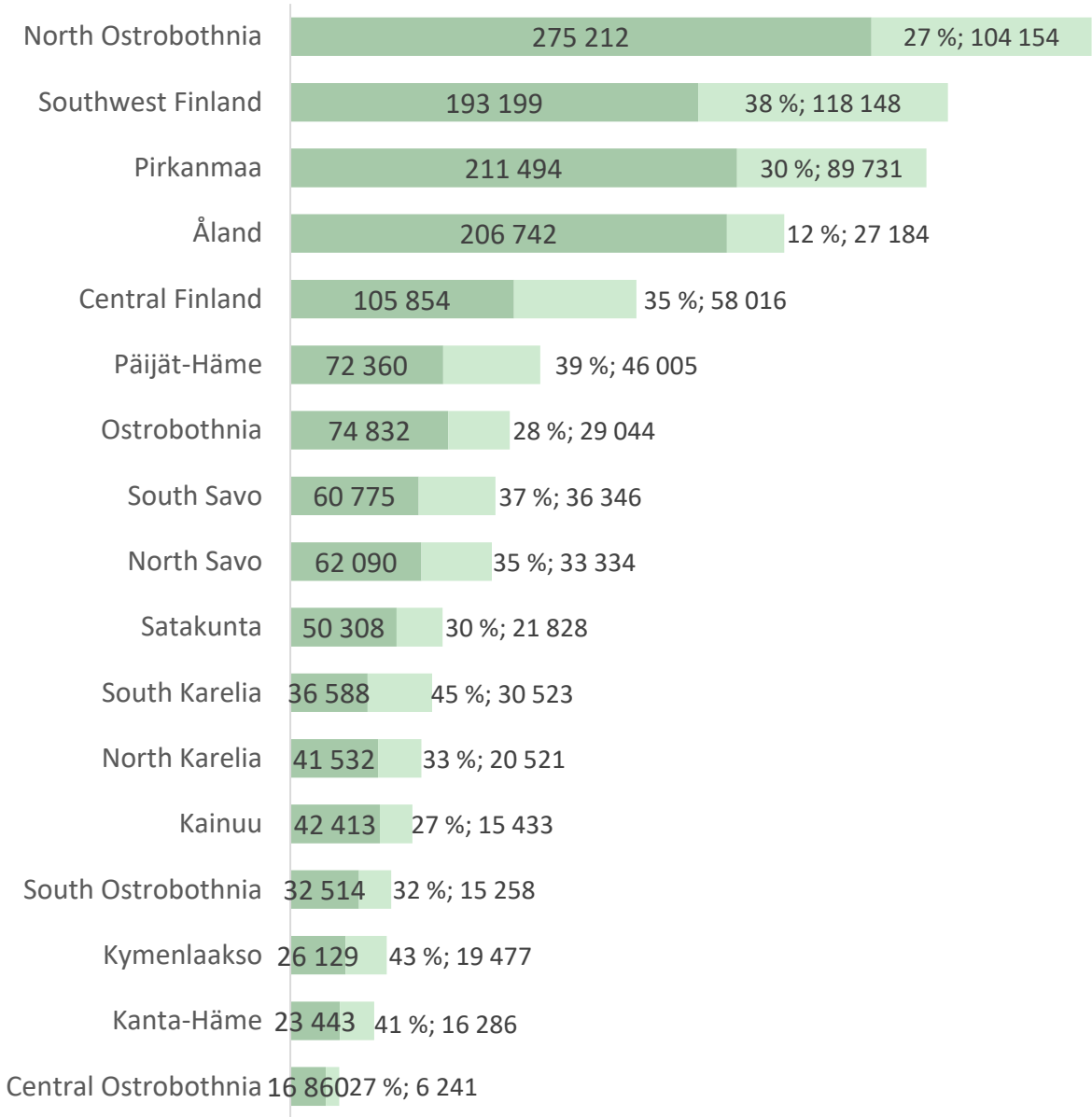


Lapland, foreign overnights in 2024



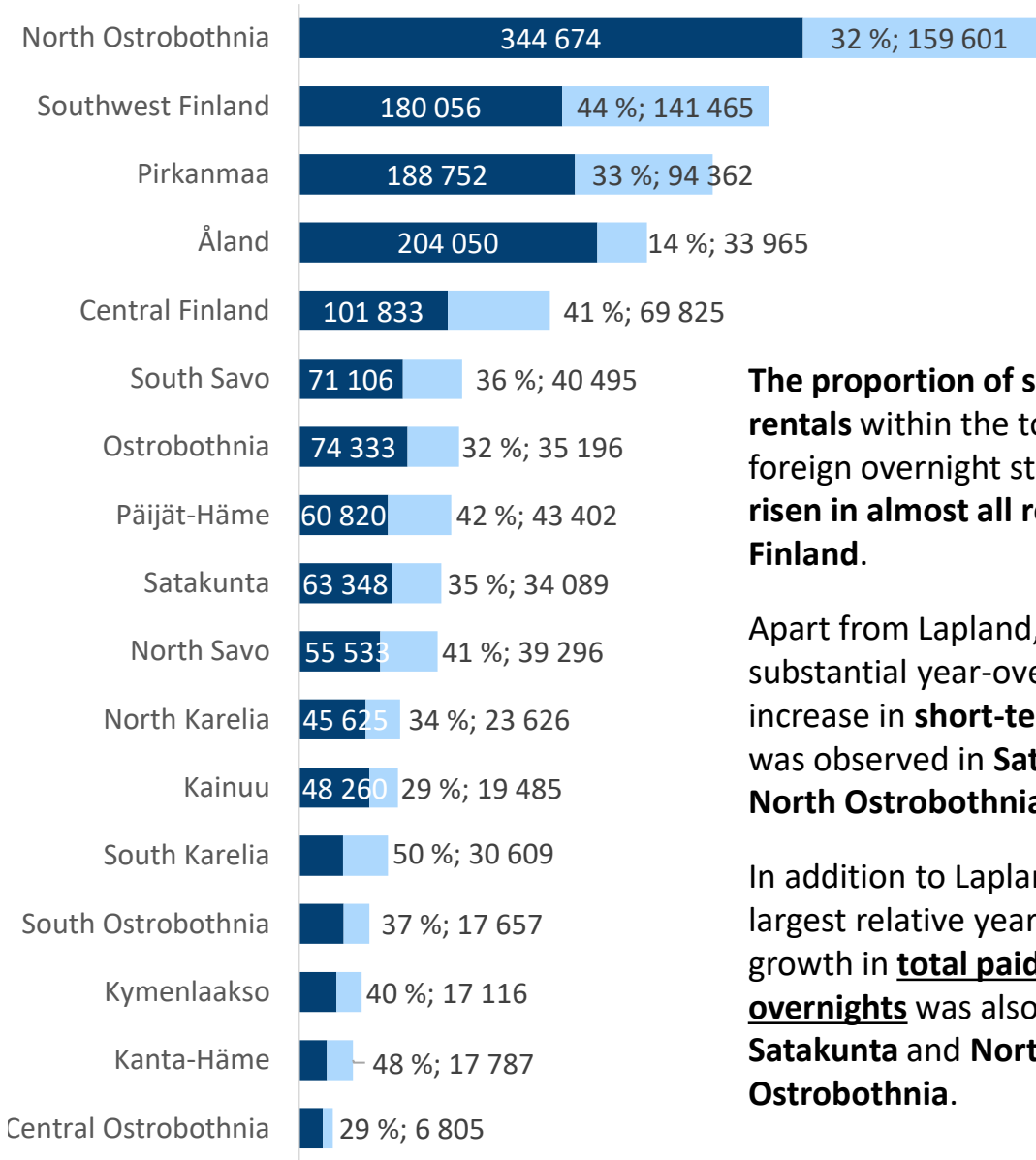
Foreign overnights in other Finnish regions - Year 2023

Registered overnights Short-term rentals overnights



Foreign overnights in other Finnish regions - Year 2024

Registered overnights Short-term rentals overnights

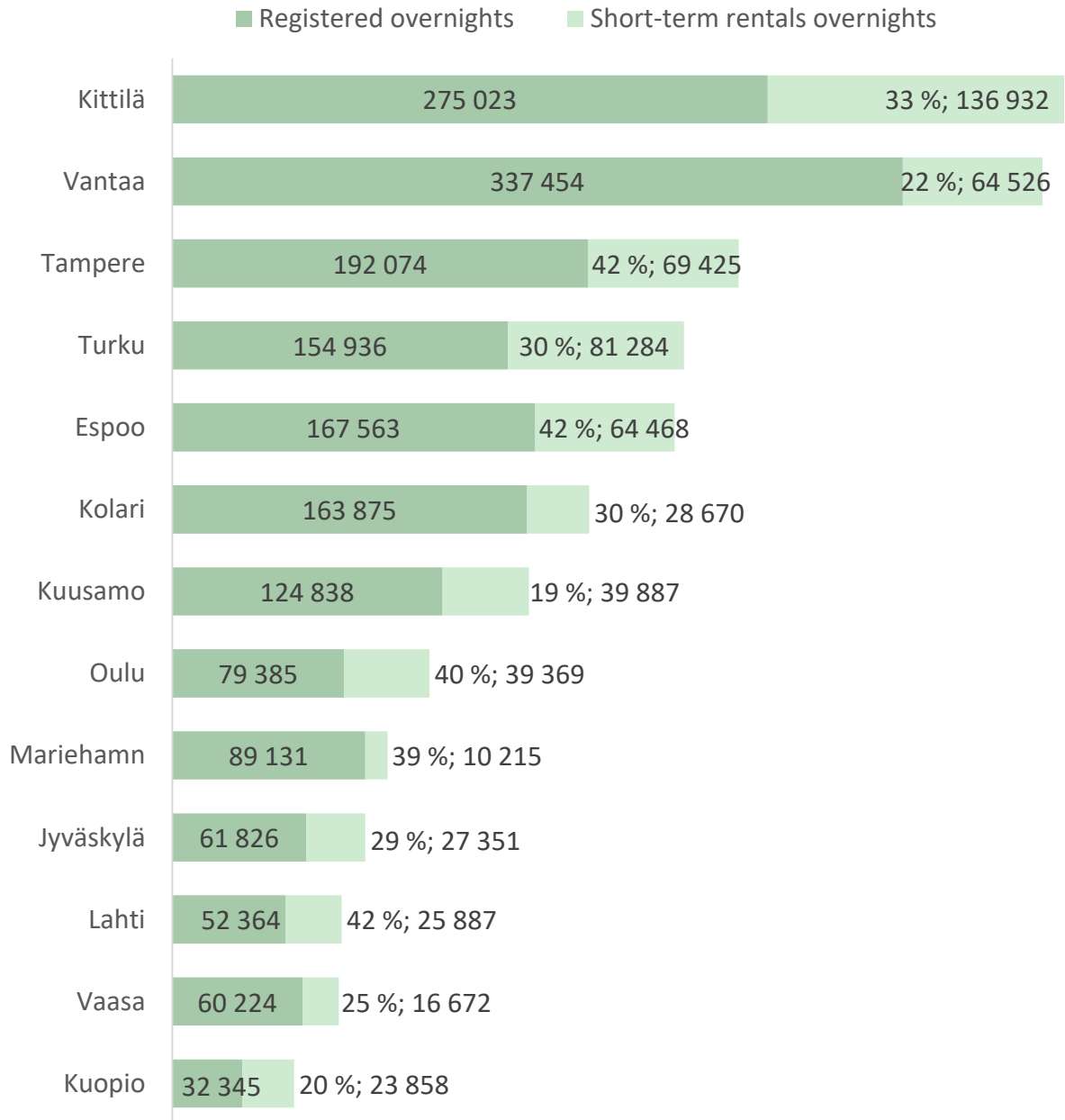


The proportion of short-term rentals within the total paid foreign overnight stays has risen in almost all regions of Finland.

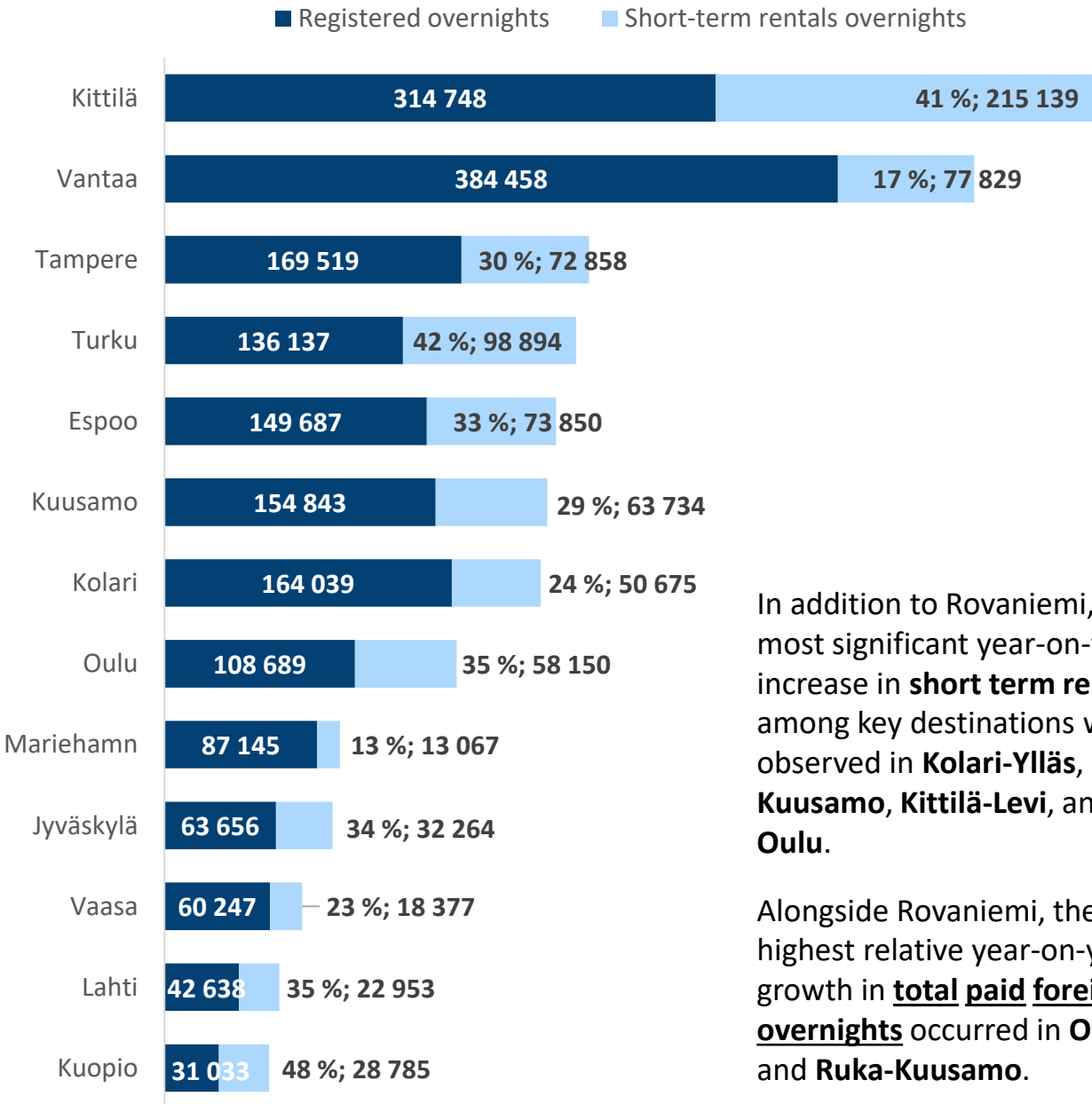
Apart from Lapland, the most substantial year-over-year increase in short-term rentals was observed in Satakunta and North Ostrobothnia.

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.**

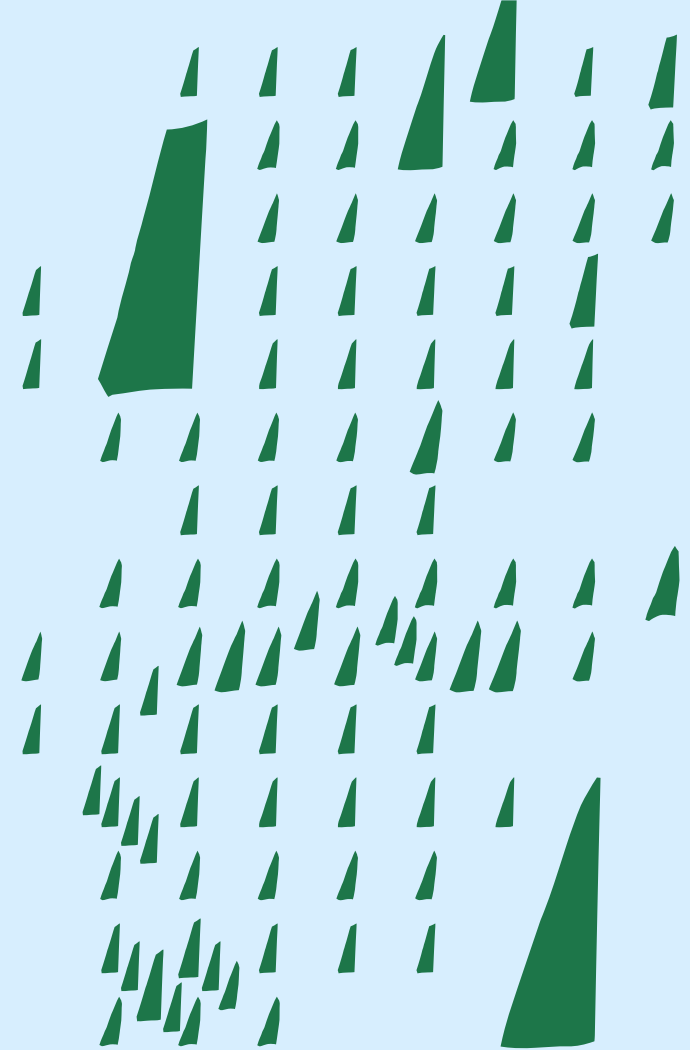
Registered overnights in the Nordics

H1-2025

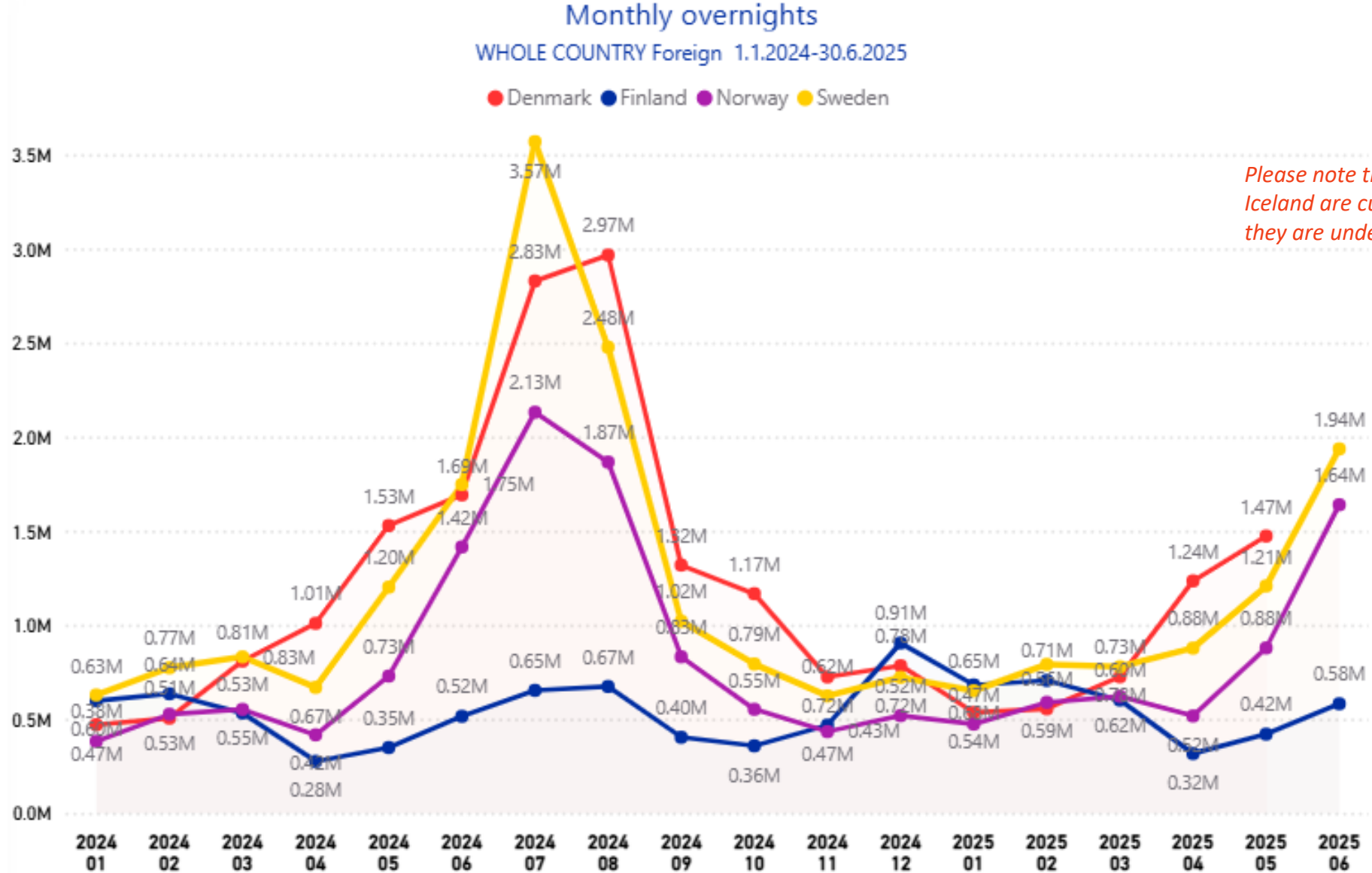
- The Nordic region has **experienced good growth** in **registered foreign overnight stays** from January to June 2025.

June 2025

- **In June 2025**, the number of foreign overnight stays **increased** in **Sweden** (+11%), **Norway** (+16%), and **Finland** (+13%) compared to previous year. *June statistics for Denmark will be published on the 20th of August.*

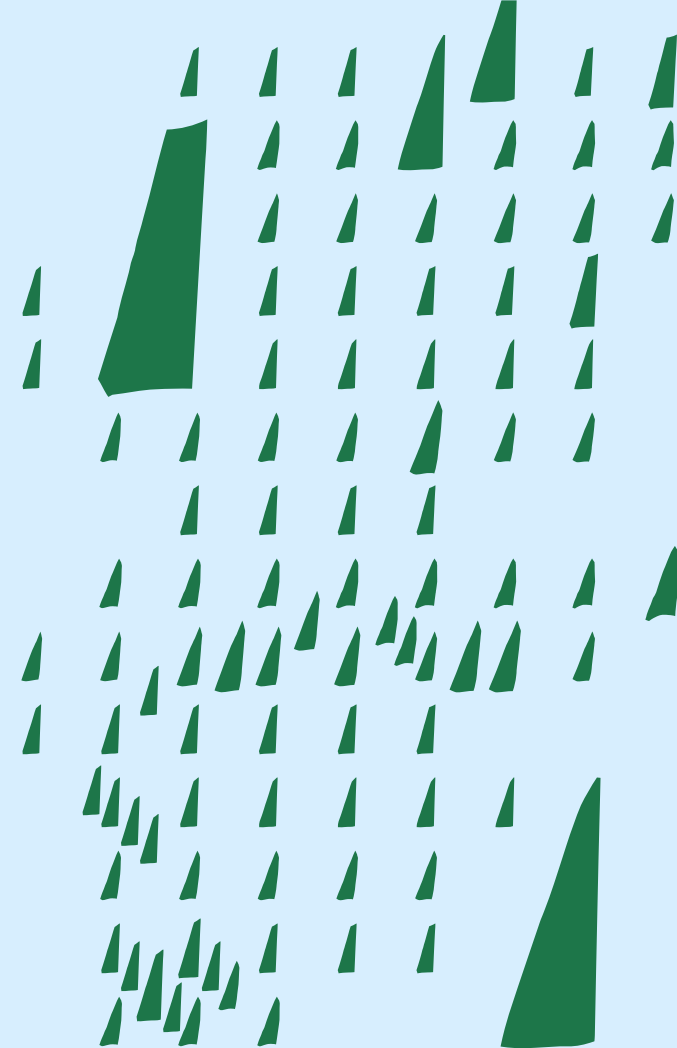


Monthly overnights in the Nordics 2024 – H1/2025



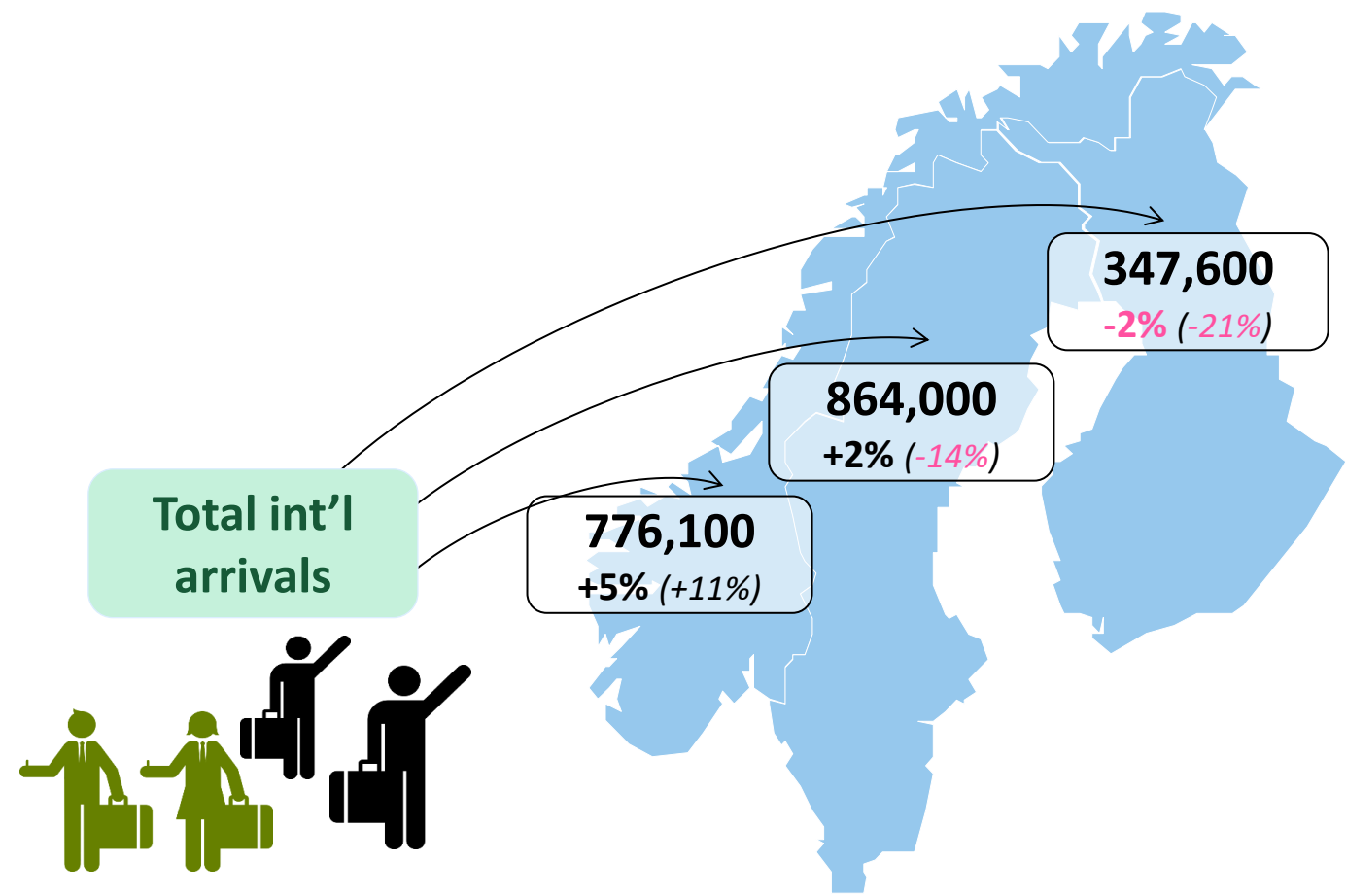
Flight bookings for Jun-Aug 2025

- Outlook for the total international flight arrivals to Finland for the **summer months** of June – August **has turned to more negative** compared to the previous forecasts. This is mainly due to several flight cancellations in June and July due to industrial actions. The current outlook for arrivals show a **2% decrease** compared to **last year**. *When comparing to summer 2019, the total int'l arrival numbers are 21% below that level.*
- Bookings for the summer months to **Norway** are growing strongly 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.



Outlook for total int'l arrivals to FI, SE & NO for Jun-Aug 2025


Comparison to previous summer and pre-pandemic



Database update 03-Aug

Follow up on the outlook of flight arrivals* to Finland in June – August 2025

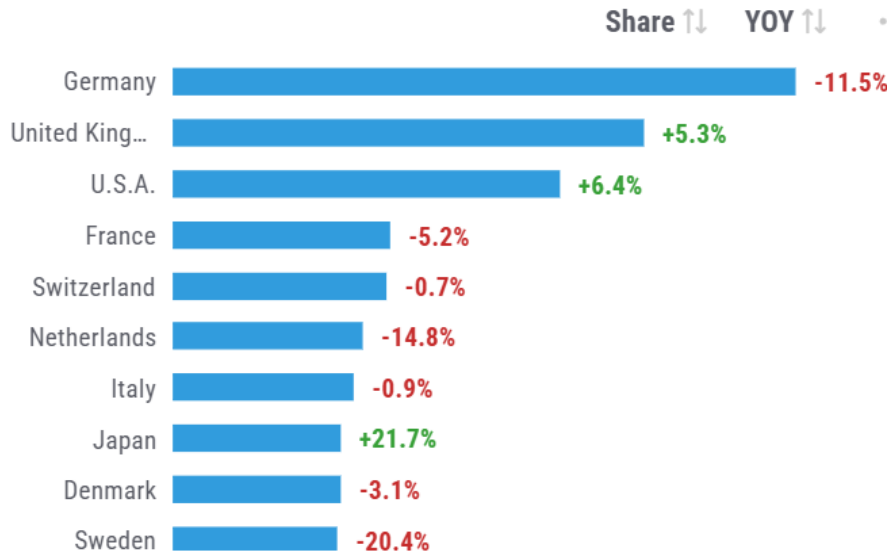
compared to previous year & (pre-pandemic)

Outlook for Jun-Aug → 30.3.2025 → 27.4. → 1.6. → 29.6. → 3.8.						No. of bookings*	Jun - Aug
Total int'l Jun-Aug 2025 YoY & (vs. pre-pandemic)							
	+8% (-12%)	+2% (-17%)	+6% (-14%)	+6% (-14%)	-2% (-21%)	347,600	
Germany	+4% (-9%)	-4% (-16%)	+1% (-12%)	0% (-12%)	-8% (-20%)	49,100	
UK	+27% (-4%)	+21% (-8%)	+27% (-4%)	+25% (-6%)	+6% (-20%)	35,400	
USA	+28% (+68%)	+11% (+44%)	+19% (+54%)	+17% (+52%)	+7% (+39%)	27,300	
Switzerland	+2% (-11%)	-4% (-16%)	+4% (-10%)	+1% (-13%)	-1% (-14%)	17,400	
Sweden	+4% (-33%)	0% (-34%)	+3% (-33%)	+4% (-32%)	-17% (-46%)	17,100	
France	+2% (+4%)	-2% (0%)	+4% (+6%)	+4% (+6%)	-4% (-2%)	16,500	
Italy	0% (-6%)	-5% (-11%)	-3% (-9%)	-3% (-9%)	+4% (-3%)	15,900	
Netherlands	+10% (+8%)	+2% (+1%)	+3% (+2%)	+2% (0%)	-13% (-14%)	14,500	
Denmark	+10% (-14%)	+7% (-17%)	+9% (-15%)	+9% (-15%)	-3% (-24%)	13,800	
Japan	+16% (-49%)	+10% (-49%)	+17% (-48%)	+22% (-43%)	+21% (-44%)	12,000	
Spain	-3% (+24%)	-5% (+20%)	-6% (+18%)	-4% (+22%)	-8% (+17%)	11,300	
Poland	-7% (+13%)	-13% (+5%)	-13% (+6%)	-10% (+8%)	-4% (+16%)	11,100	

✈ Worldwide (excl. domestic) → Helsinki (HEL)
Filtered period | 01 Jun 2025 - 31 Aug 2025 ⓘ

305,198
tourist arrivals

-3.5%
YOY for selected origins



Database update 03-Aug

✈ Worldwide (excl. domestic) → Finland

Filtered period | 01 Jun 2025 - 31 Aug 2025 ⓘ

347,622
tourist arrivals

-2.4%
YOY for selected origins

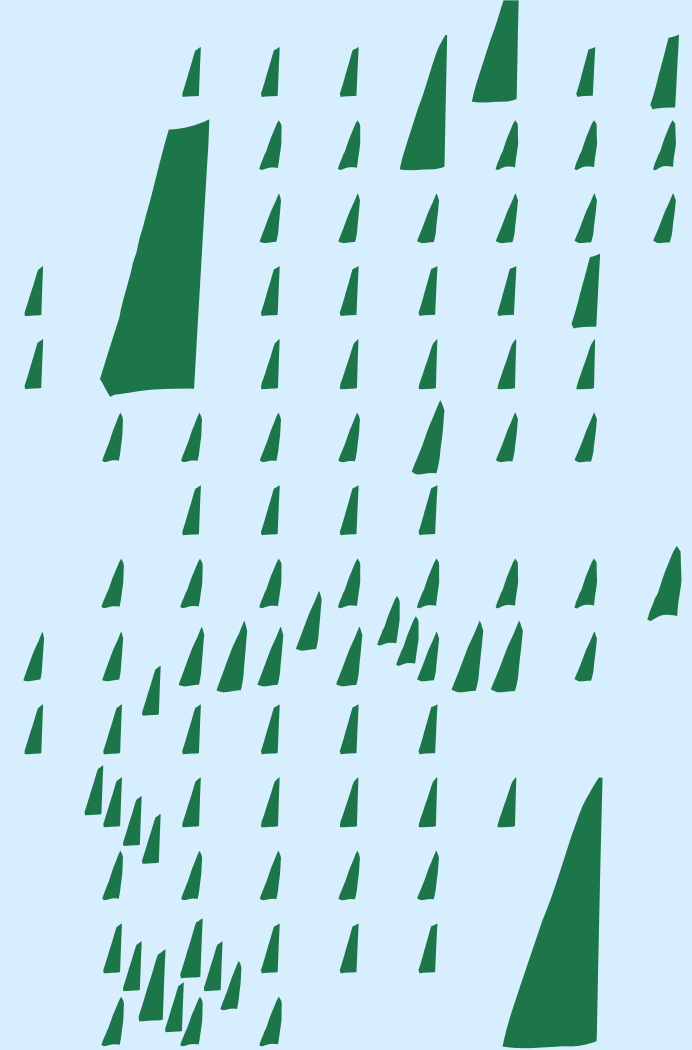
Arrival destination	Booking outlook for Jun-Aug 2025	Share of int'l bookings	Change vs. Jun-Aug 2024
Helsinki	305,200	87.8%	-4%
Oulu	8,400	2.4%	+1%
Rovaniemi	8,200	2.4%	+13%
Turku	5,900	1.7%	-8%
Vaasa	5,700	1.6%	-10%
Kuopio	3,500	1.0%	+131%
Tampere	2,700	0.8%	+36%
Kittilä	1,200	0.3%	+4%
Ivalo	1,100	0.3%	+9%
Joensuu	1,100	0.3%	+4%

To Kuusamo, Kajaani, Jyväskylä, Kemi/Tornio, Kokkola/Pietarsaari, Lappeenranta, Mariehamn, Pori, and Savonlinna less than one thousand bookings for summer high season 2025

Seat capacity on int'l flights

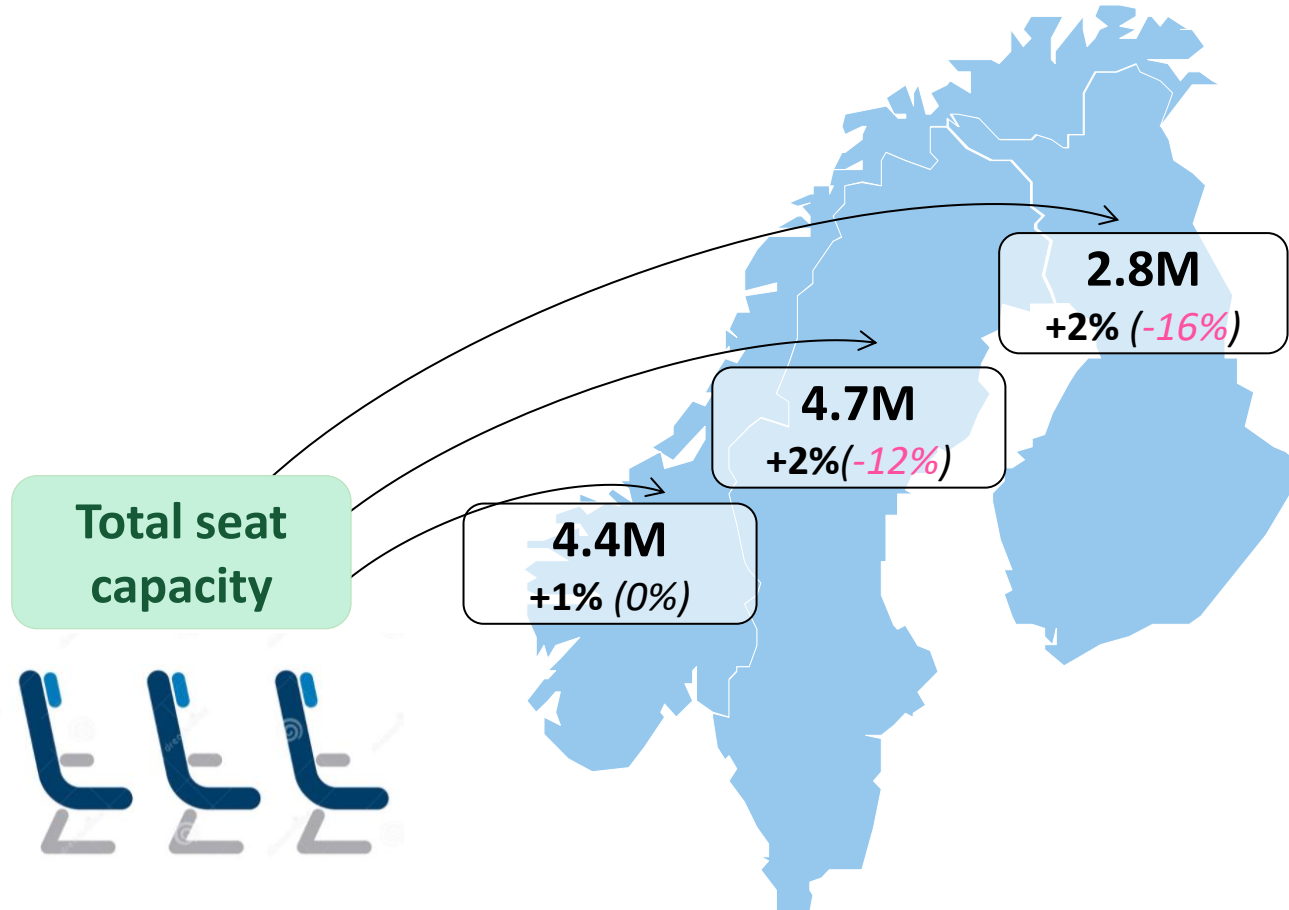
June – August 2025

- **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 and July. As a result, total int'l seat capacity to Finland for the summer is **2% above 2024 level**, *but 16% below the pre-pandemic level*.
 - As the flight cancellations have affected mainly the European flights, seat capacity from **Europe** is only 1% above the level of summer season 2024. *Compared to summer 2019, seat capacity on European flights is on a 13% lower level.*
 - Seat capacity from **Asia** improves 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

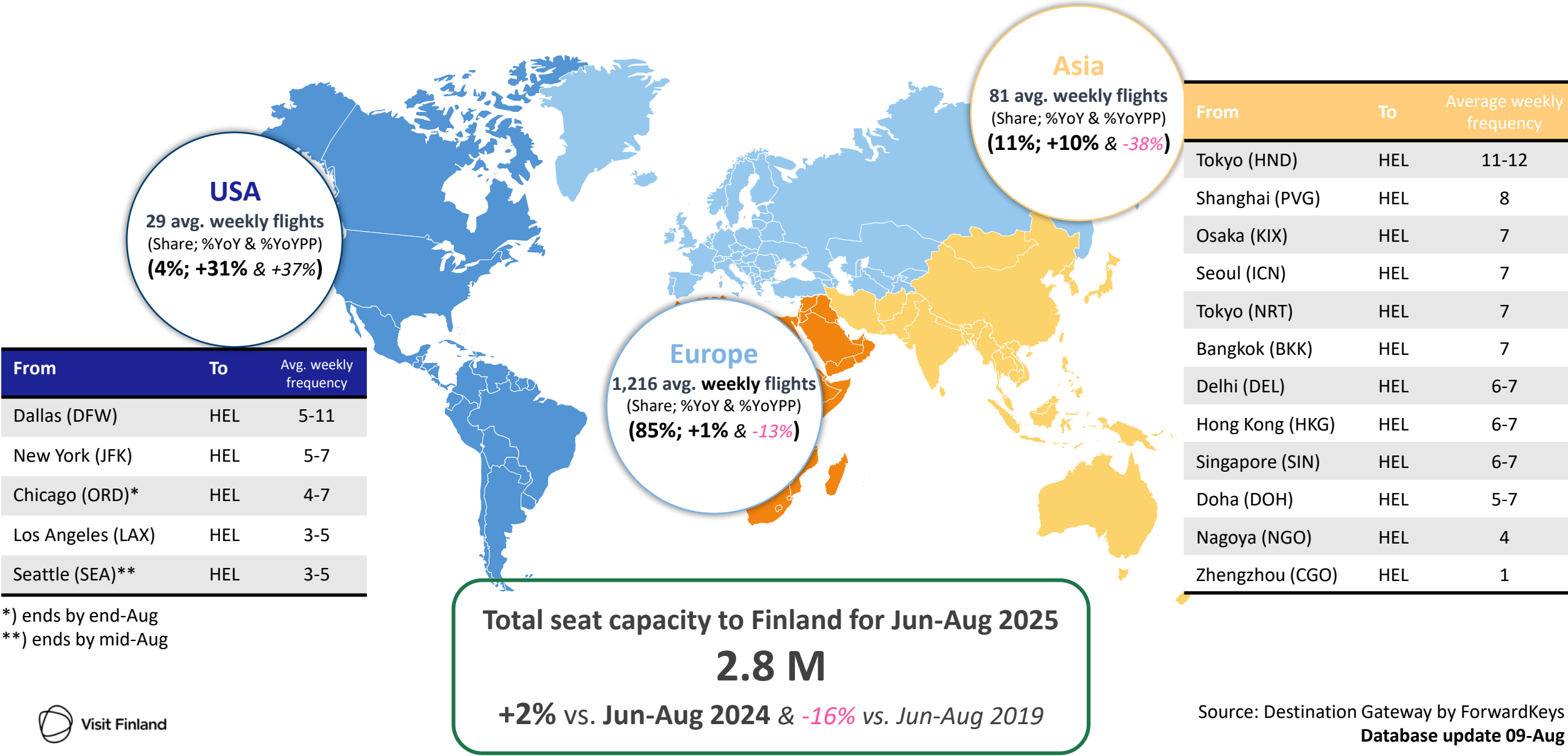
Comparison to previous summer and pre-pandemic



Database update 08-Aug

Direct int'l flights to Finland Jun-Aug 2025

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

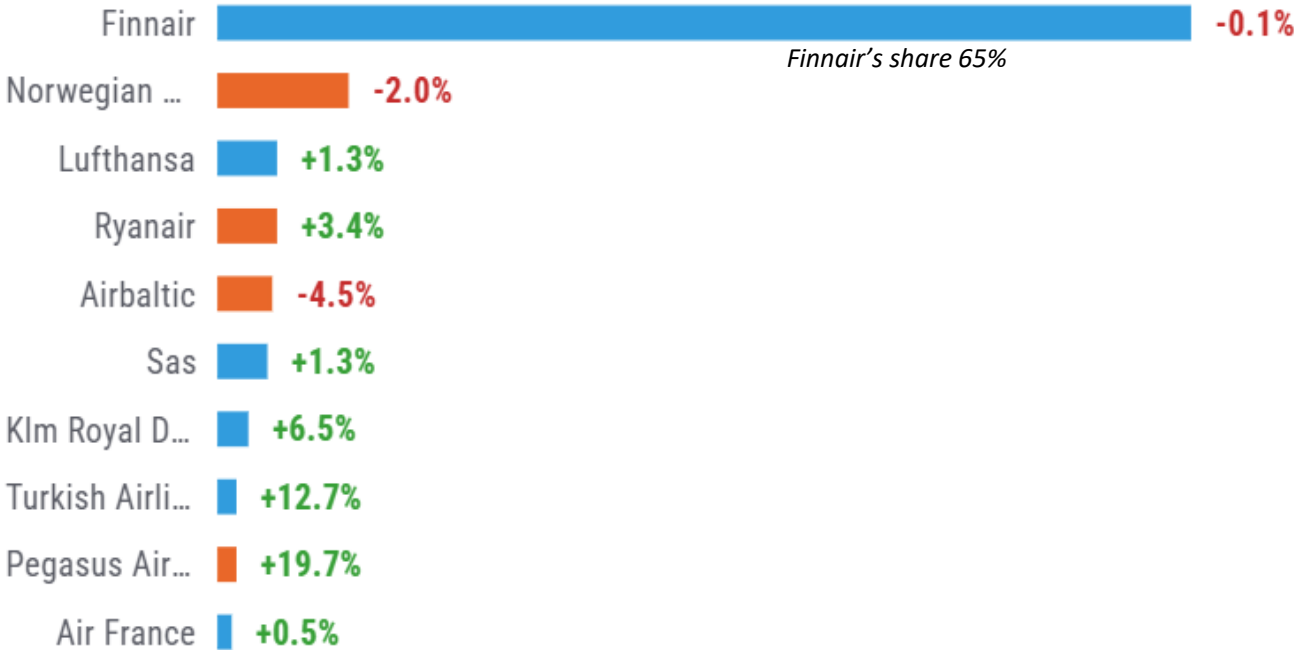


EUROPE to Finland / Jun – Aug 2025

From (selected countries)	Share	Seat capacity compared to 2024	Seat capacity compared to 2019
Germany	12%	-1%	-17%
Sweden	10%	-5%	-24%
UK	8%	+24%	-15%
Spain	7%	-5%	-21%
Italy	6%	-7%	+22%
Greece	6%	-5%	+12%
Denmark	6%	+4%	-18%
Latvia	5%	+15%	+46%
France	5%	-1%	-6%
Netherlands	4%	0%	+1%
Poland	4%	-12%	-4%
Norway	4%	-4%	-17%
Turkiye	4%	+14%	+30%
Estonia	3%	0%	+31%
Switzerland	2%	-5%	-8%
Croatia	2%	-4%	-19%

Top10 airlines operating
from Europe to Finland

+0.5%
YOY for selected airlines

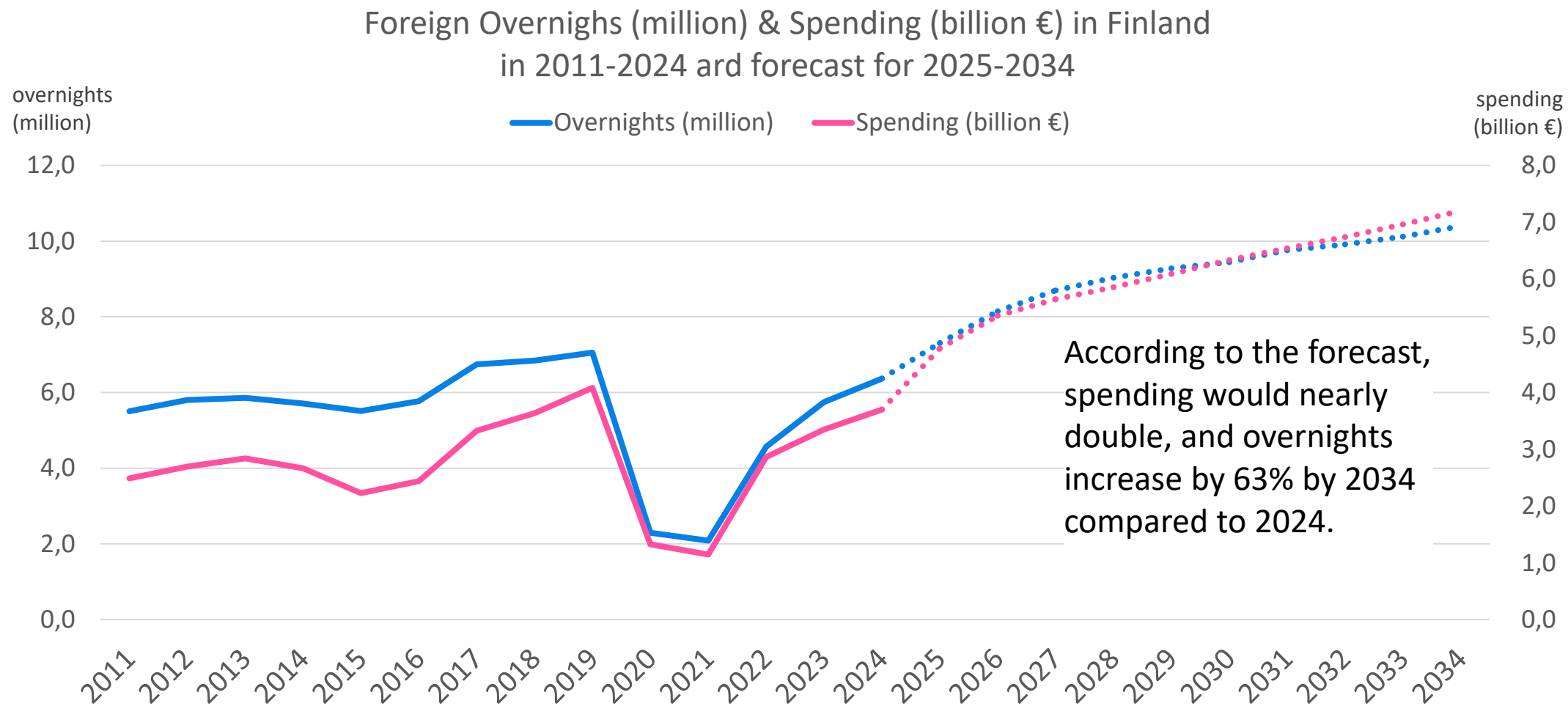


Oxford Economics forecast for development of foreign overnights & spending in Finland

Databank update March 2025

Forecast of foreign overnights and spending

Databank update March 2025



Source: Oxford Economics, Tourism databank update March 2025

