



Visit Finland

VF monthly follow-up

July 2025



Summary

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

- **Border survey – leisure up, business down:** In the latest Aug 2024–Jul 2025 period, foreign travellers made **5.0 million** trips to Finland (+3% YoY) with total spending of **€3.7 billion** (–3% YoY). Leisure travel dominates (**76%** of visits) and grew robustly (+8% in trips, +5% in spend). In contrast, business travel (24% of trips) declined –8% in trip volume, with spending falling –21%. Notably, **holiday** tourism and **conference** trips clearly increased.
- **Registered overnight stays rising: 712,500** foreign overnight stays were recorded in July 2025 (+9% YoY), although still **10%** below July 2019 levels. During Jan–Jul 2025, **4.0 million** foreign overnights were registered in Finland, up +13% from 2024 and just 1% shy of Jan–Jul 2019.
 - **Key source markets:** **Germany** remains the top source market of foreign overnights (Jan–Jul 2025), followed by **Sweden, France, the UK, USA, and Netherlands**. All major markets grew compared to 2024. However, some markets are still catching up to pre-pandemic volumes – e.g. overnight stays from Sweden are –6% vs 2019, Estonia –18%, Japan –14%, and China (incl. HK) –49% compared to Jan–Jul 2019 – whereas **North American and many European markets now exceed 2019 levels**.

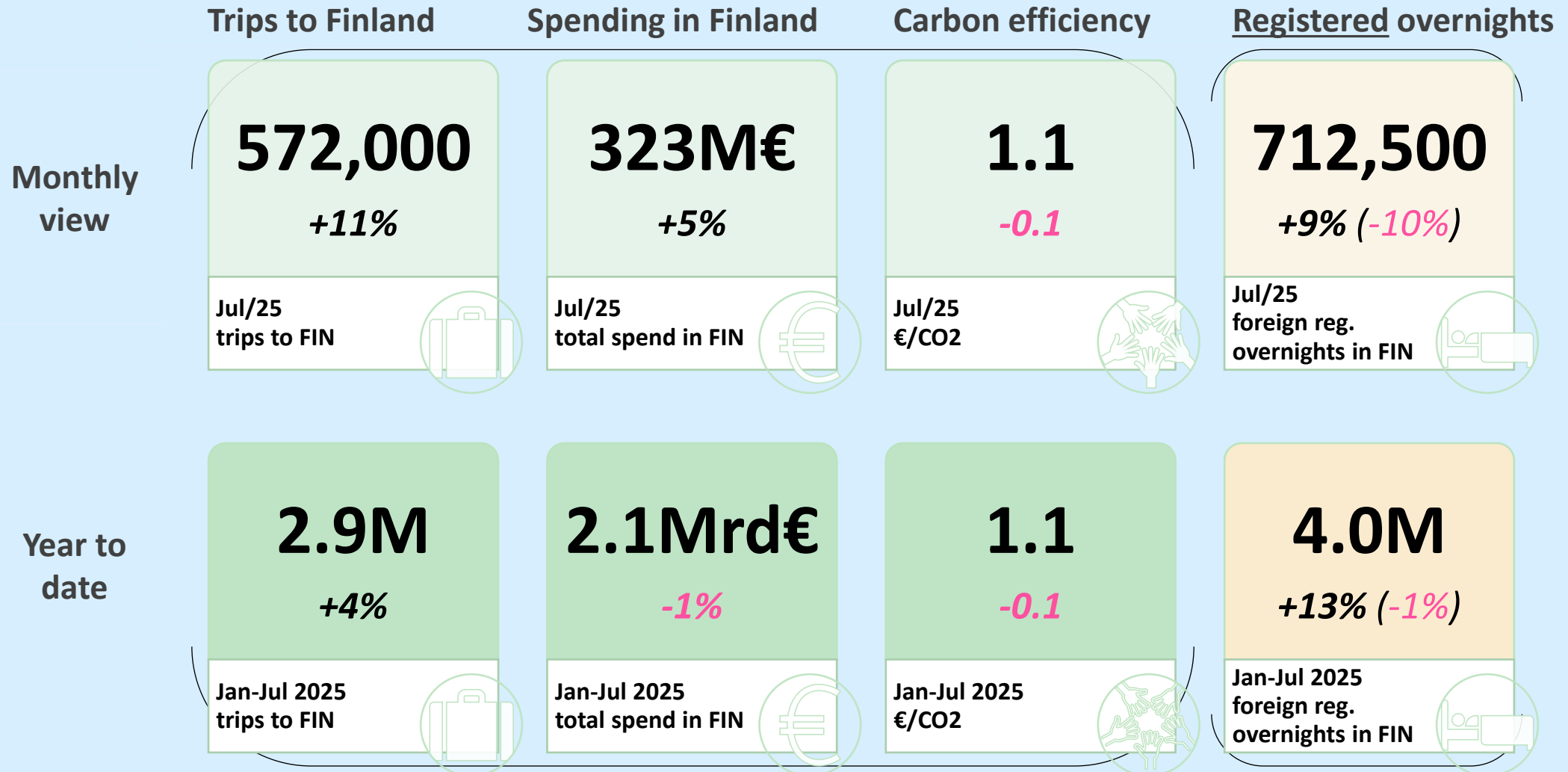
Summary

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

- The **Nordic region**: Experienced **good growth** in **registered foreign overnight stays** from January to July 2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **13%** (Sweden leading with a 33% share).
 - **Germany** is clearly the biggest source market, and their overnights have increased in each of the four Nordic countries.
 - Beside Germany, overnights increased to each Nordic country from **the US, the Netherlands, Sweden, Denmark, France, Switzerland, Finland, Spain, Belgium, and China** among the main source markets.
- **Winter 2025–26 outlook**: The upcoming high winter season is expected to see further recovery in inbound travel. International **seat capacity** to Finland in Dec 2025–Feb 2026 is projected **+6%** higher than last winter (almost back to 2019 levels). **Flight arrivals** to Finland are forecasted to increase by **+4%** vs winter 2024–2025 (helped by improved connectivity to Helsinki and airports in Lapland region). Several key origin markets are expected to grow compared to both previous winter *and winter 2019*, reflecting a robust rebound in demand. The strong air capacity from the US and Europe is poised to offset slower Asian recovery, pointing to another **positive winter tourism season for Finland**.

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

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



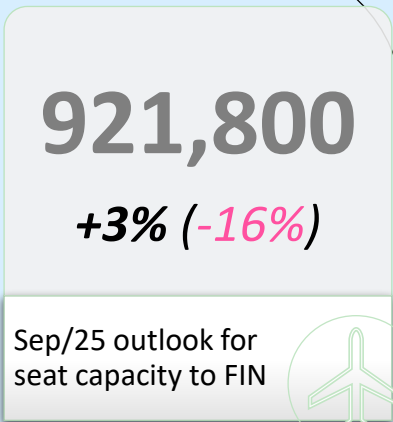
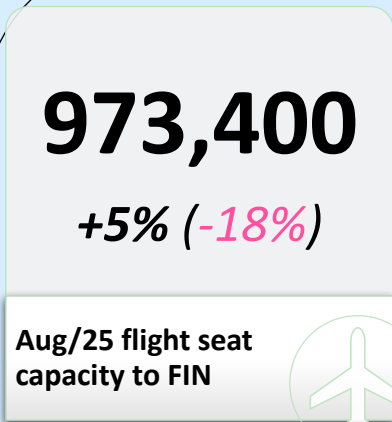
Int'l Flight Bookings & Seat Capacity to Finland

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

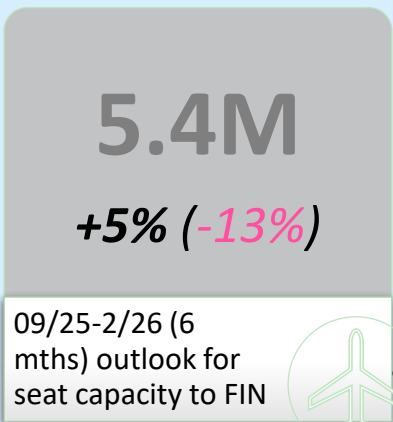
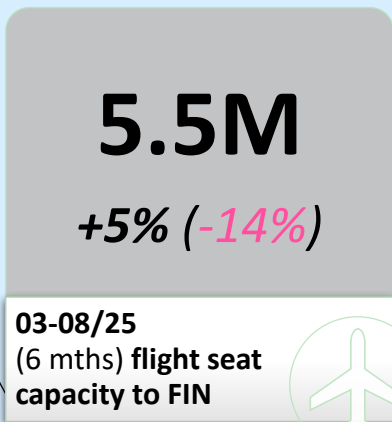
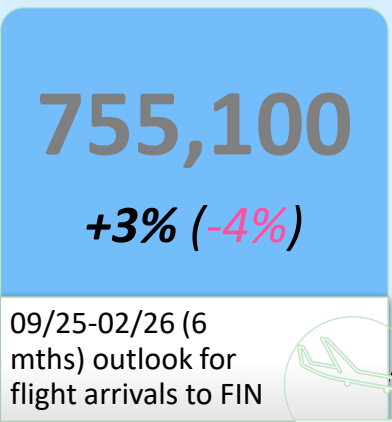
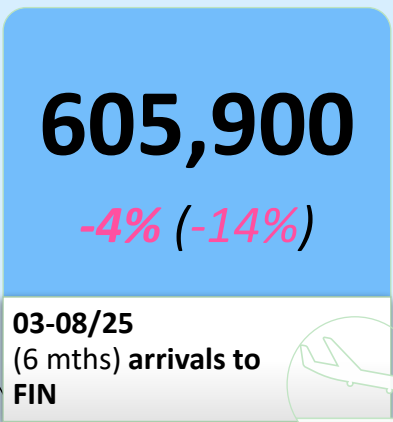
Flight arrivals / outlook for arrivals*

Seat capacity

Monthly
historical
& forecast
view



6 months'
historical
& forecast
view



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

Border Survey

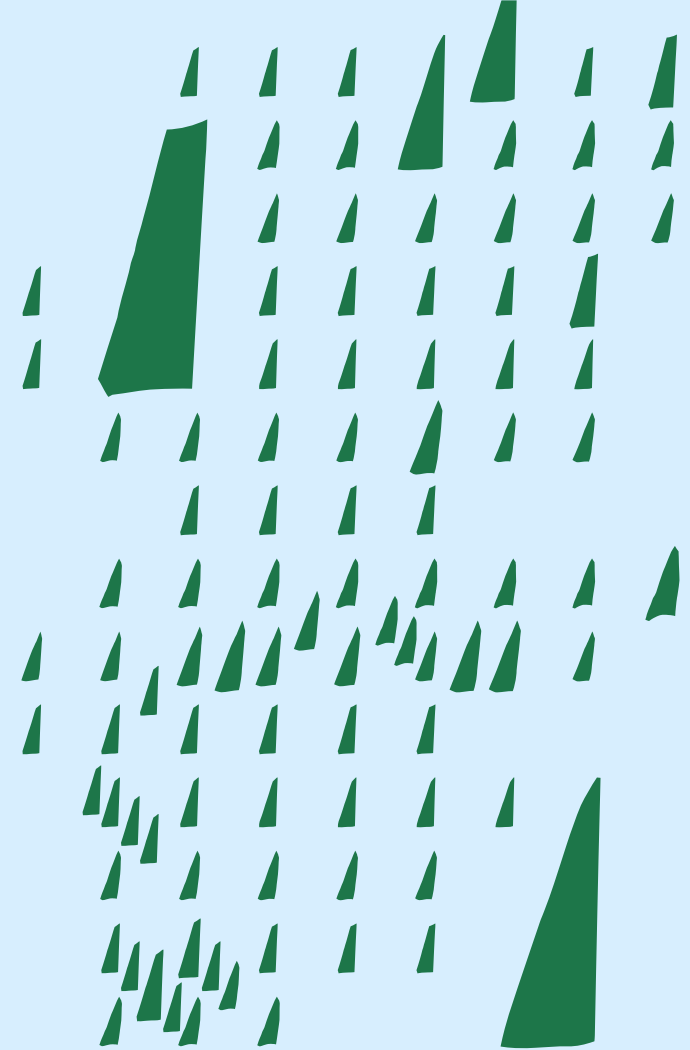
Latest 12 months (Aug/2024 – Jul/2025)

Foreign travellers made **5 million trips to Finland**, a **3% increase** compared to Aug/2023 – Jul/2024. However, total spending in Finland was **3.7 billion euros**, marking a **3% decrease**.

- **Leisure travel** constituted **76%** of all trips, **increasing by 8%**, with leisure traveller spending rising by **5%**.
- **Work-related trips** made up **24%** of all trips, but these **decreased by 8%**, and spending by business travellers dropped by **21%**.

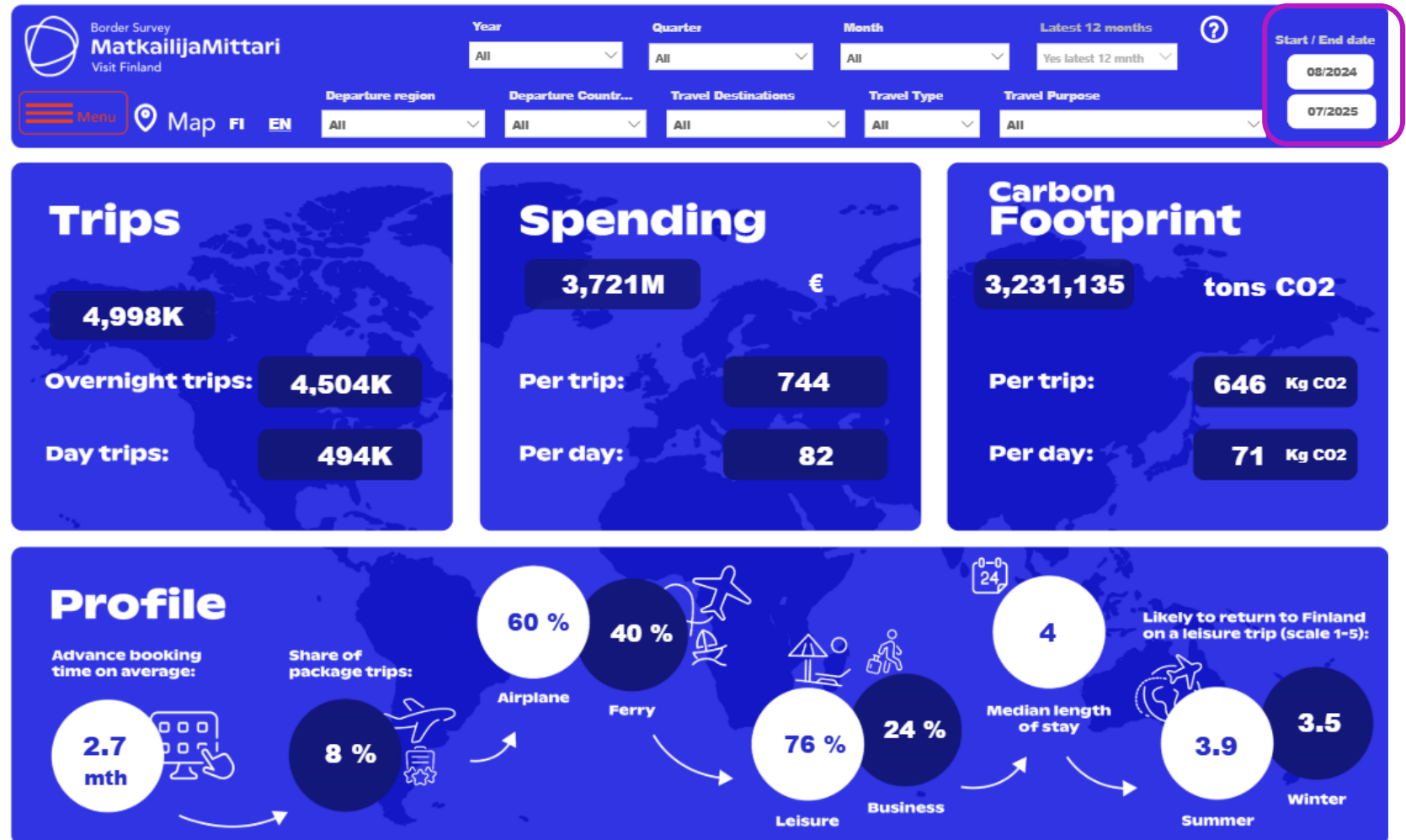
Over half of all travellers were on a **holiday trip**, while **19% visited friends or relatives**. Holiday travel increased compared to the previous period, whereas visits to friends and relatives declined. **Business travel overall decreased**, except for attendees of conferences, congresses or trade fairs, whose numbers clearly increased.

Daily spending by **holiday travellers** increased by 8%, averaging 131 euros per day. Among **business travellers**, those attending conferences, congresses, or trade fairs spent the most, averaging 134 euros per day.



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

- **5.0 million** visitors (YoY **+3%**)
 - 90% overnight trips
- Spending **3.7 billion€** (YoY **-3%**)
 - 744 € / trip (YoY **-6%**)
 - 82 € / day (YoY **+9%**)
- **76%** travelling for **leisure** (leisure trips **+8%** & spending **+5%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.2 months**)
- Median length of stay **4 nights** (YoY no change)



Border Survey / Latest 12 months (Aug 2024 – Jul 2025)

Foreign visitors in Finland

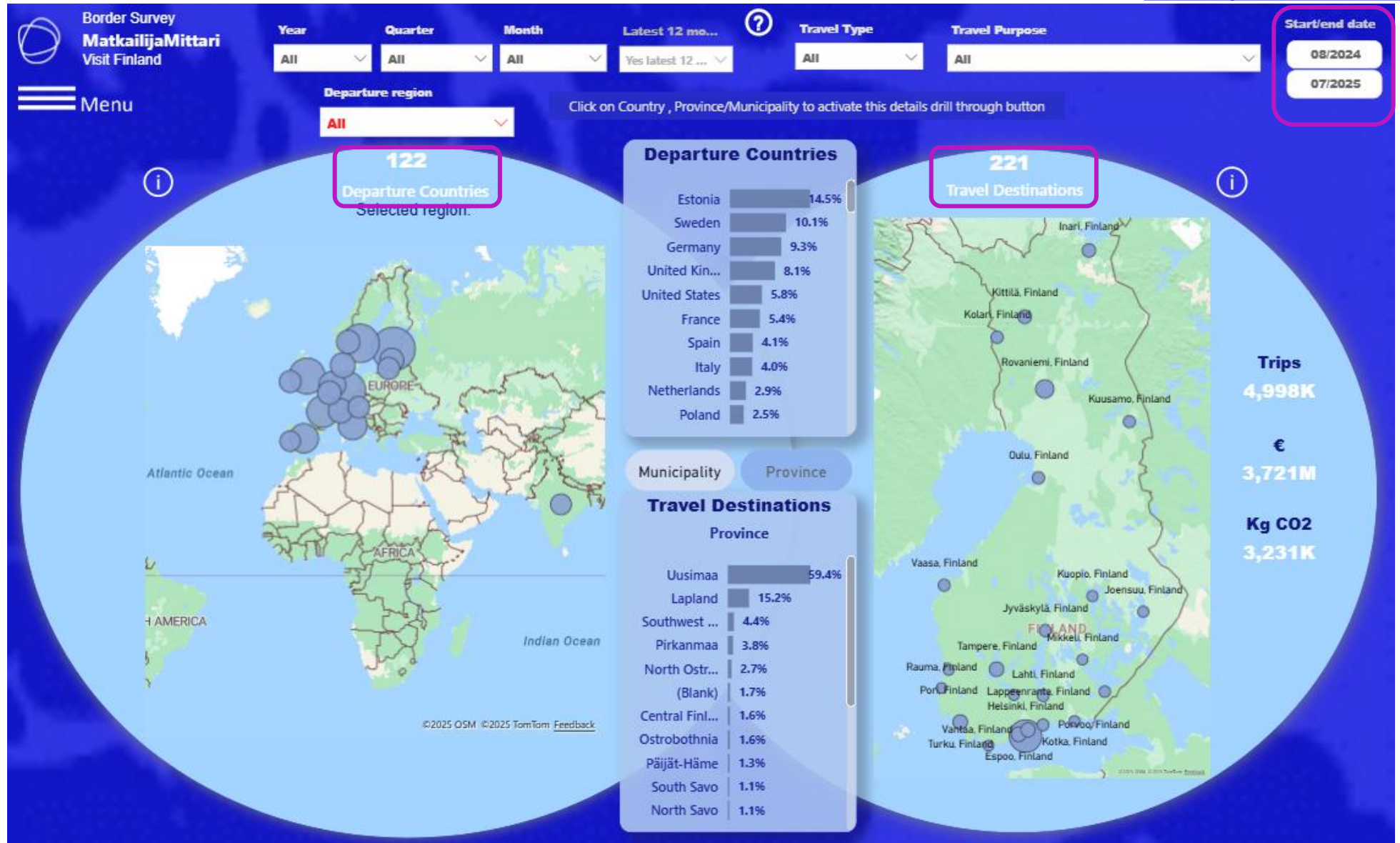
[Link to the report:](#)
[Matkailijamittari - Visit Finland](#)

Top5 source markets for leisure/personal trips

- Estonia
- Sweden
- Germany
- UK
- USA

Top5 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Italy/Latvia/
Poland/France



Border Survey

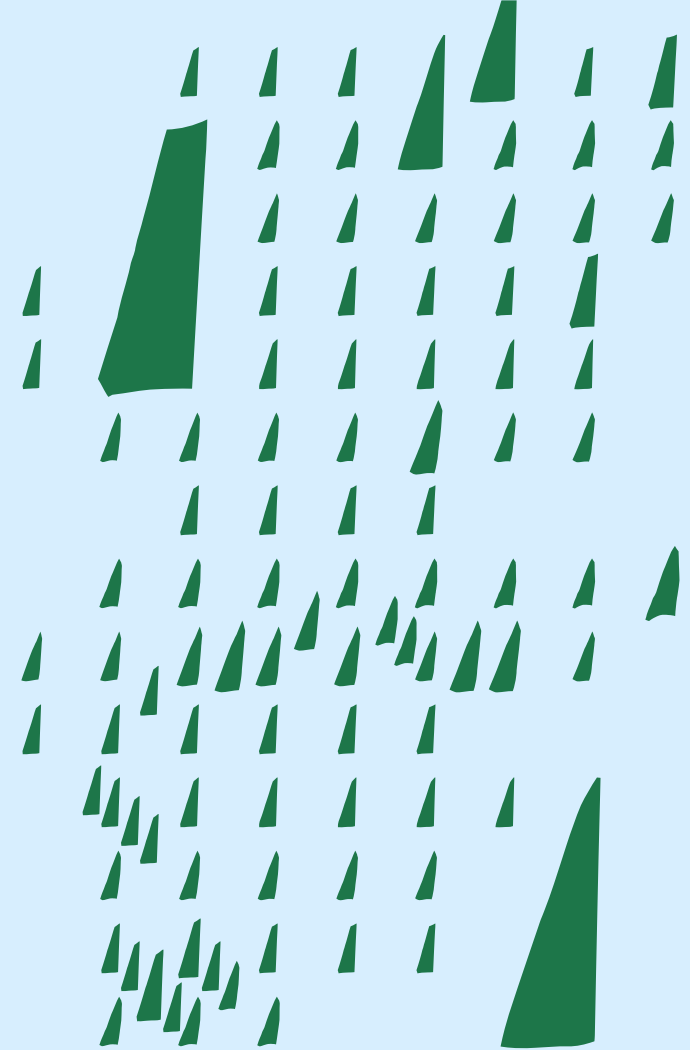
January-July 2025

Trips increased by 4%, but total spend was slightly lower than in January-July 2024.

- Vacation and recreational trips and total spend both increased by 18%.
- Business travel as a whole decreased by 6% and total spend by 20%. However, trips to conferences, congresses or fairs increased clearly (+34%) and the total spend of these visitors increased by 16% compared to the previous year.

The largest number of visitors originated from **Estonia, Sweden, Germany, the UK, and France.**

Visitors from **Germany, France, Estonia, the USA, and the UK** were the main contributors to the total spend in Finland.



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

Total

Trips
2,921K

Prev yr
2,806K

% Trips change
4.1

Eur Total
2bn

Prev yr
2bn

€ change %
-0.5

- **Leisure travel** to Finland **increased by 8%** during January-July 2025. Visitors travelling for leisure purposes also **spent 8% more** in Finland compared to Jan-Jul 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-Jul 2024.

Leisure travellers

Trips	Prev yr	Trips change
2,176K	2,007K	+8%
€ Total	Prev yr	€ change
1,601M	1,483M	+8%

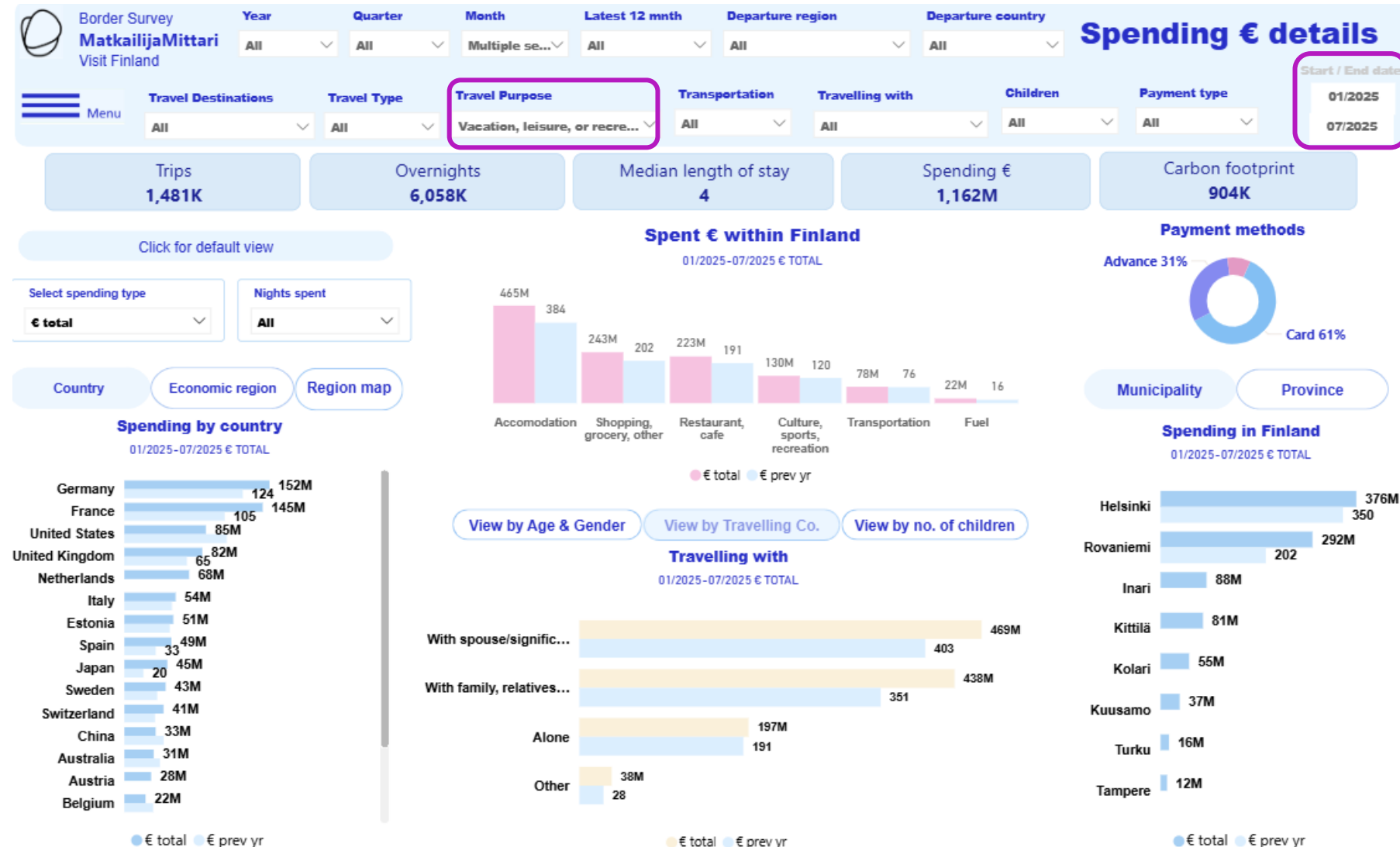
Business travellers

Trips	Prev yr	Trips change
721K	769K	-6%
€ Total	Prev yr	€ change
496M	617M	-20%

Spend by vacation travellers in Finland during Jan-Jul 2025

Jan-Jul 2025 vs. Jan-Jul 2024

- **Total spend was highest for vacation travellers** coming from **Germany** and **France**, 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.
- **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** counted both around **20%** of total spend.



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

All foreign visitors in Finland

Country	Vacation Trips	YoY trips change %
Estonia	442,000	-14%
Sweden	303,000	+3%
Germany	282,000	+1%
UK	209,000	+11%
France	174,000	+9%

Country	M€ total	YoY € change %
Germany	234.7	+7%
France	191.0	+23%
Estonia	177.8	-14%
USA	140.8	-17%
UK	131.2	-4%

Country	€ / trip	YoY € / trip change %
China	1,326	-9%
Singapore	1,208	+10%
Austria	1,110	-28%
France	1,096	+13%
Canada	1,063	-14%

Country	€ / day	YoY € / day change %
Singapore	158	-20%
Japan	151	-16%
France	125	+38%
USA	121	+5%
Canada	120	+64%

Vacation/recreation travellers in Finland

Country	Vacation Trips	YoY trips change %
Germany	163,000	+3%
Estonia	149,000	+7%
France	120,000	+24%
Sweden	116,000	+23%
UK	110,000	+24%

Country	M€ total	YoY € change %
Germany	152.1	+23%
France	145.0	+38%
USA	85.5	-20%
UK	81.7	+25%
Netherlands	67.9	+20%

Country	€ / trip	YoY € / trip change %
Austria	1,398	N/A
France	1,211	+11%
Switzerland	1,159	+3%
Netherlands	1,066	-6%
Belgium	1,051	+7%

Country	€ / day	YoY € / day change %
France	182	+19%
Austria	182	N/A
Japan	181	-18%
Australia	160	-6%
China	157	-18%

Registered Overnights

• Jan-Jul 2025

- The number of registered foreign overnights reached **4.0 million**, marking an **13%** increase from the previous year.
- The leading source markets were **Germany, Sweden, France, UK, USA, and the Netherlands**.
- Overall accommodation revenue increased by **5%**, with **foreign revenue rising by 18%** and domestic revenue decreasing by 2% compared to the same period last year. **Foreign revenue accounted for 36%** of the total accommodation revenue, while **foreign overnights accounted for 29%** of total overnights.

• July 2025

- Total foreign overnights reached **712,500** in July (**+9% YoY**, & **-10%** compared to July 2019).
- Leading source markets in July were **Sweden, Germany, and USA**.
- **43%** of registered foreign overnights took place in **Helsinki**, and the number of overnights marked a new record for July with 303,400 foreign overnight stays.
- Biggest source market for Helsinki was USA with 35,200 overnights (+53% YoY). Germany with 32,400 overnights came second (+12%). Overnights increased also from nearly all main source markets compared to previous year.

Registered overnights January – July 2025

	Jan-Jul 2025	Change-% vs. Jan-Jul 2024	Change-% vs. Jan-Jul 2019
Total	13.8M	+2%	0%
Domestic	9.8M	-2%	0%
Foreign, total	4.0M	+13%	-1%
Foreign excl. Russia	4.0M	+13%	+12%
Scandinavia	529,500	+3%	-4%
EU-27 + UK	2.5M	+9%	+15%
America	376,000	+17%	+47%
Asia	581,900	+37%	-10%



Main source markets

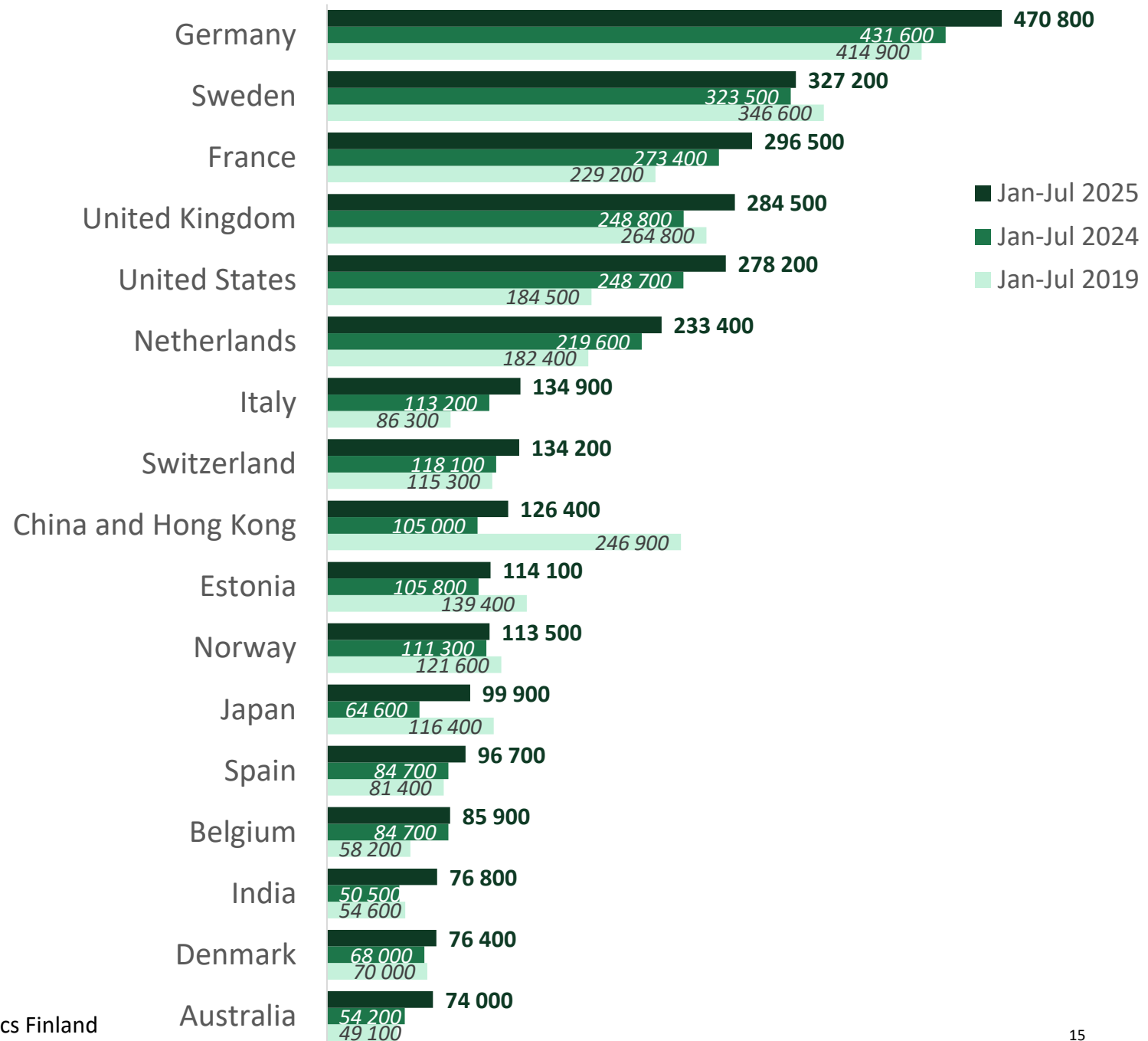
January – July 2025

vs. Jan-Jul 2024 & Jan-Jul 2019

Between January and July 2025, **Germany** remained the top source market for **registered overnights**. Other significant source markets included **Sweden**, **France**, **the UK**, **USA**, and **the Netherlands**.

Overnight stays from all major source markets **exceeded the totals recorded in the previous year**.

Compared to January-July 2019, overnight stays from Sweden (-6%), China including Hong Kong (-49%), Estonia (-18%), Norway (-7%), and Japan (-14%) still lagged behind pre-pandemic levels.



Registered foreign overnights increased by 9% in July

July 2025

712,500 total foreign overnights;
+9% vs. 07/2024, **(-10%)** vs. 07/2019)

710,800 foreign excl. Russia; **+9%**, (+5%)

440,700 EU+UK; **+10%**, (+6%)

170,900 Scandinavia; **0%**, (0%)

76,200 Asia; **+25%**, **(-10%)**

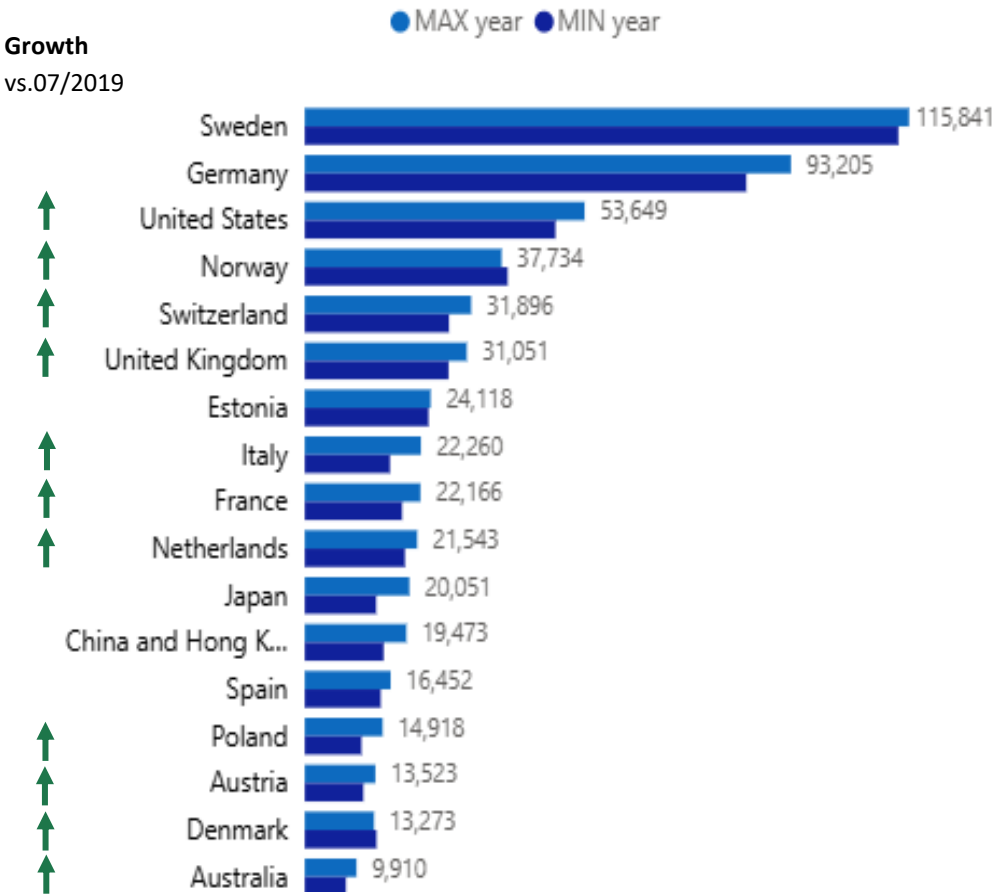
72,300 America; **+15%**, (+9%)

Top destinations for total foreign; vs. 07/2024, (vs. 07/2019)

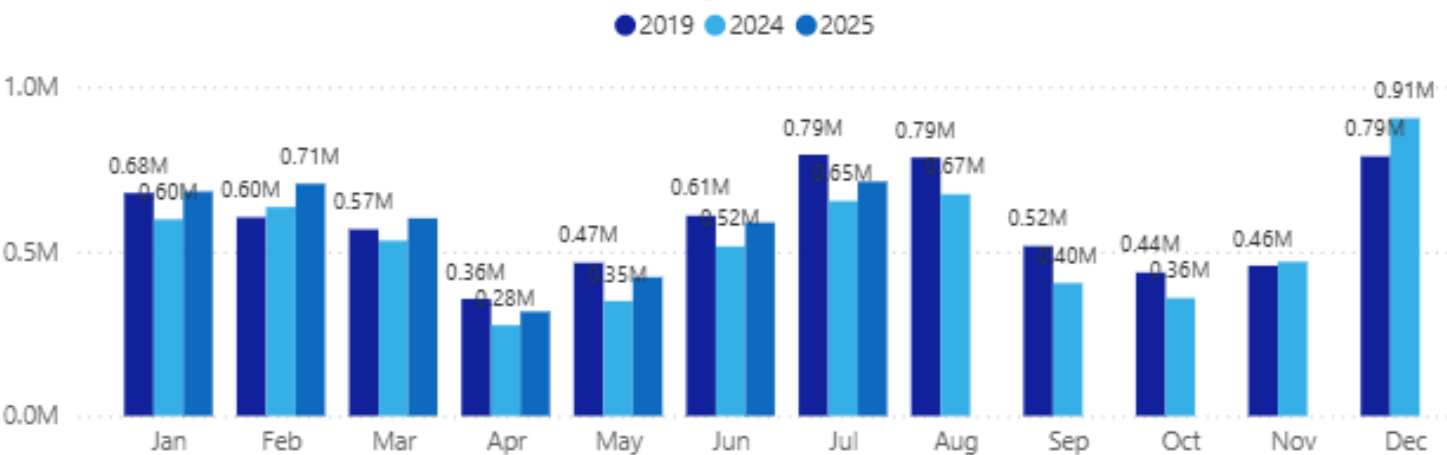
- **303,400 Helsinki; +13%, (+9%)**
- 46,400 Vantaa; **+26%, (+3%)**
- 25,100 Rovaniemi; **+23%, (+4%)**
- 22,300 Turku; **+14%, (+3%)**
- 20,400 Oulu; **+1%, (+6%)**
- 16,100 Tampere; **-15%, (+3%)**
- 16,000 Inari-Saariselkä; **+1%, (-13%)**
- 15,900 Espoo; **-2%, (-31%)**
- 15,500 Mariehamn; **-28%, (-41%)**
- 14,800 Savonlinna; **+9%, (-23%)**
- 14,200 Vaasa; **+28%, (+11%)**

Top source markets, total foreign; vs. 07/2025

OVERNIGHTS 2025 compared to 2024 months 7-7



FOREIGN OVERNIGHTS



Registered overnights in the Nordics

Jan-Jul 2025

- The Nordic region has **experienced good growth** in **registered foreign overnight stays** from January to July 2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **13%** (Sweden leading with a 33% share).
- **Germany** is clearly the biggest source market, and their overnights have increased in each of the four Nordic countries.
- Beside Germany, overnights increased to each Nordic country from **the US, the Netherlands, Sweden, Denmark, France, Switzerland, Finland, Spain, Belgium, and China** among the main source markets.

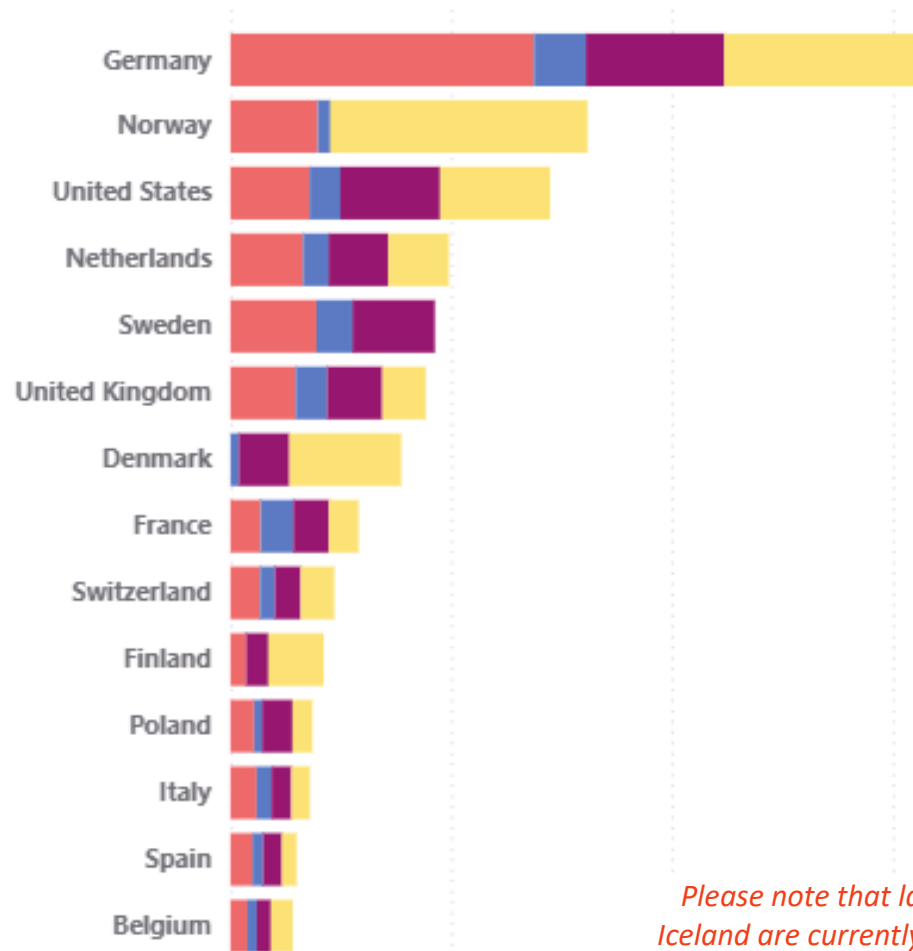
July 2025

- **In July 2025**, the number of foreign overnight stays **increased** in each of the four Nordic countries; **Sweden** (+6%), **Denmark** (+6%), **Norway** (+19%), and **Finland** (+9%) compared to previous year.
- **Sweden** holds a **38% share** of the foreign overnights in **July**, Denmark 30%, Norway 25%, and **Finland** only **7%**. Sweden receives a good number of visitors from the other Nordic countries during the popular holiday month being July in the Nordics.

Foreign overnights in the Nordics Jan-Jul 2025

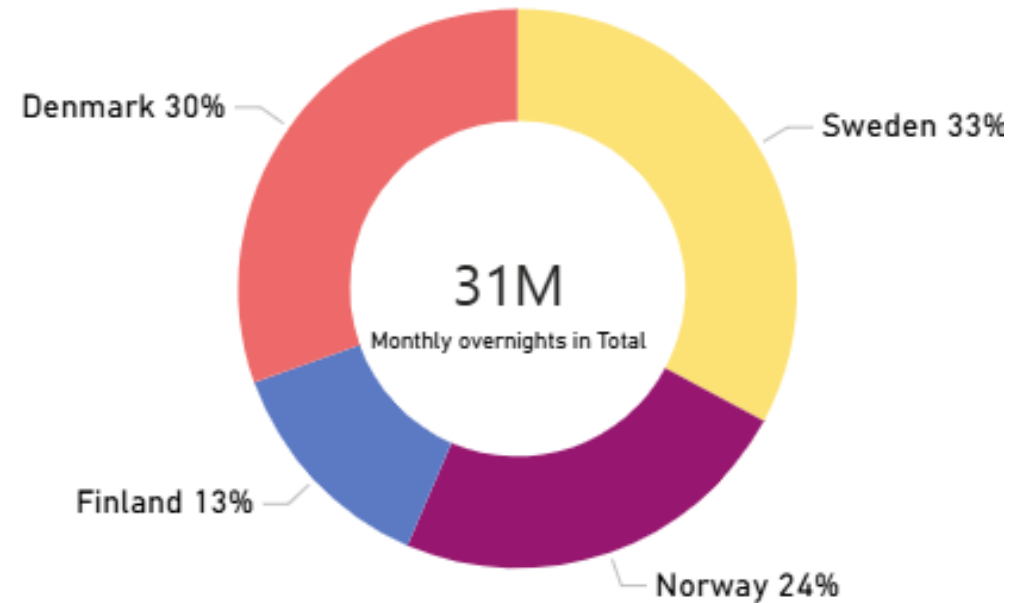
Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2025-31.7.2025



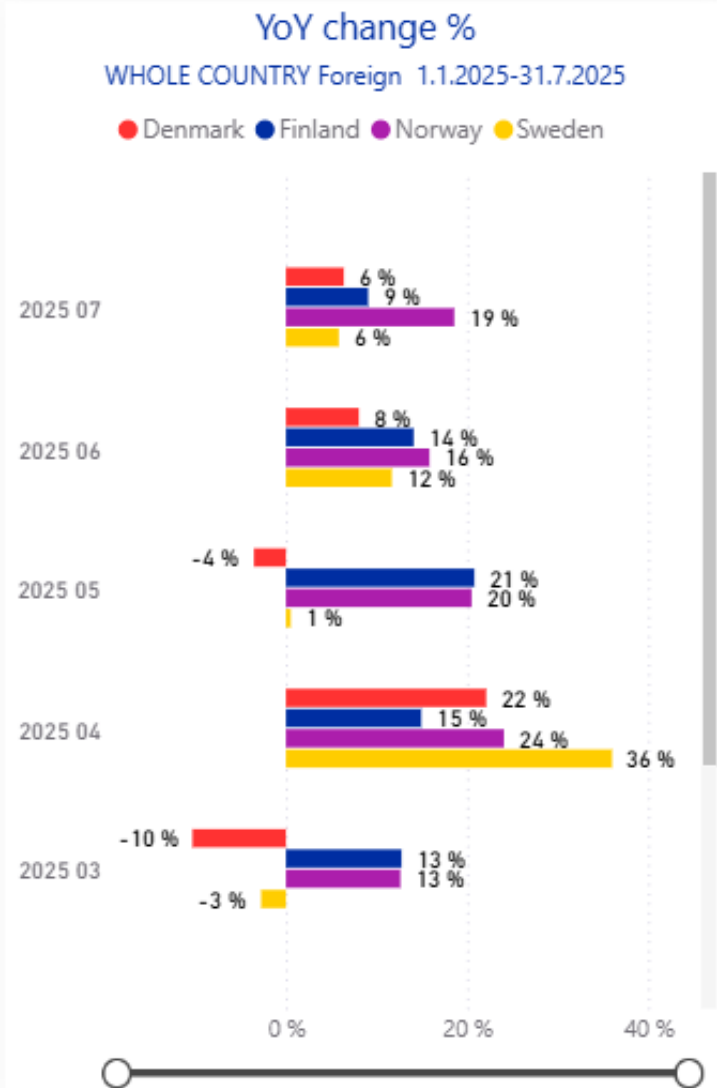
Please note that latest statistics for Iceland are currently not available as they are undergoing revisions.

WHOLE COUNTRY Foreign 1.1.2025-31.7.2025

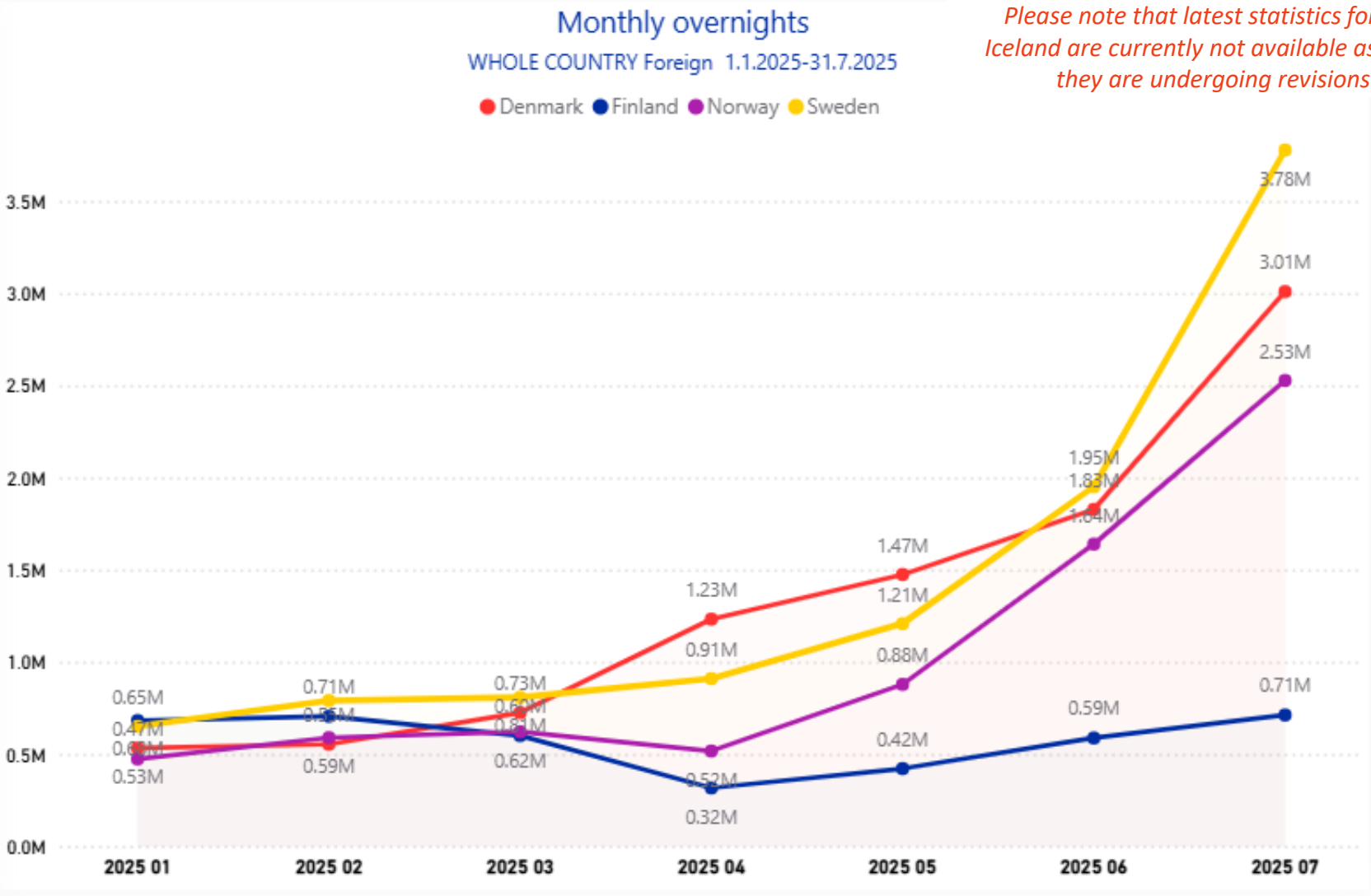


Nordics	Monthly	YoY change %
Sweden	10,098,186	7 %
Denmark	9,357,826	6 %
Norway	7,248,378	18 %
Finland	4,028,402	13 %

Monthly overnights in the Nordics Jan-Jul 2025



Monthly overnight statistics for Iceland include hotels & guest houses only.



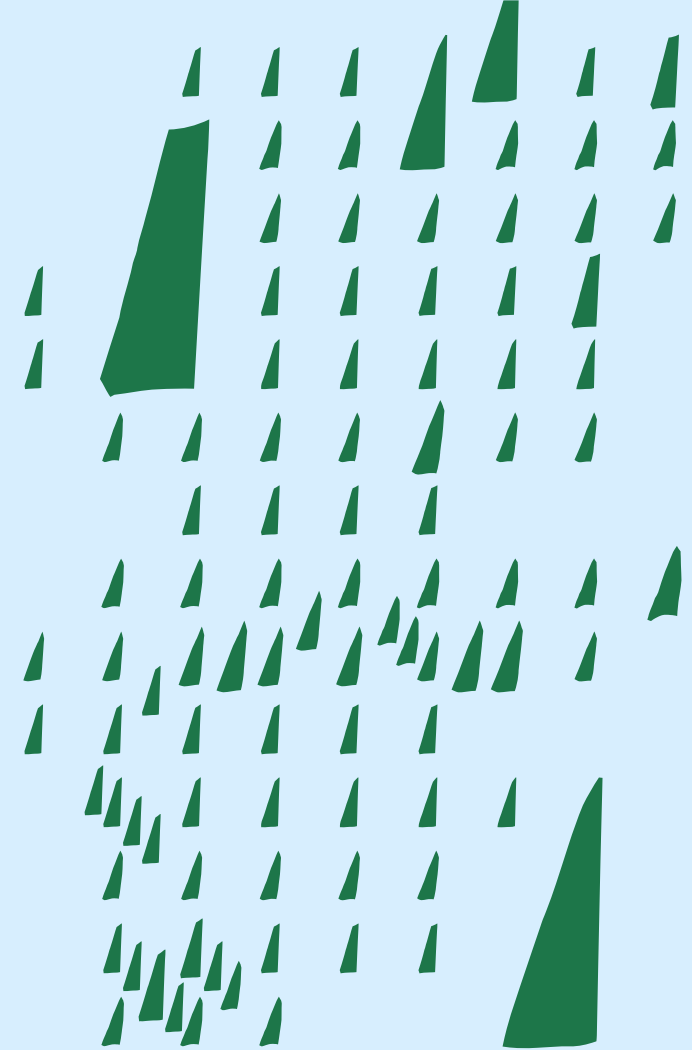
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Sources: Visit Finland Rudolf Data Base, Statistics Finland; Statistics Sweden; Statistics Norway; Statistics Denmark; Statistics Iceland

International Flight Seat Capacity

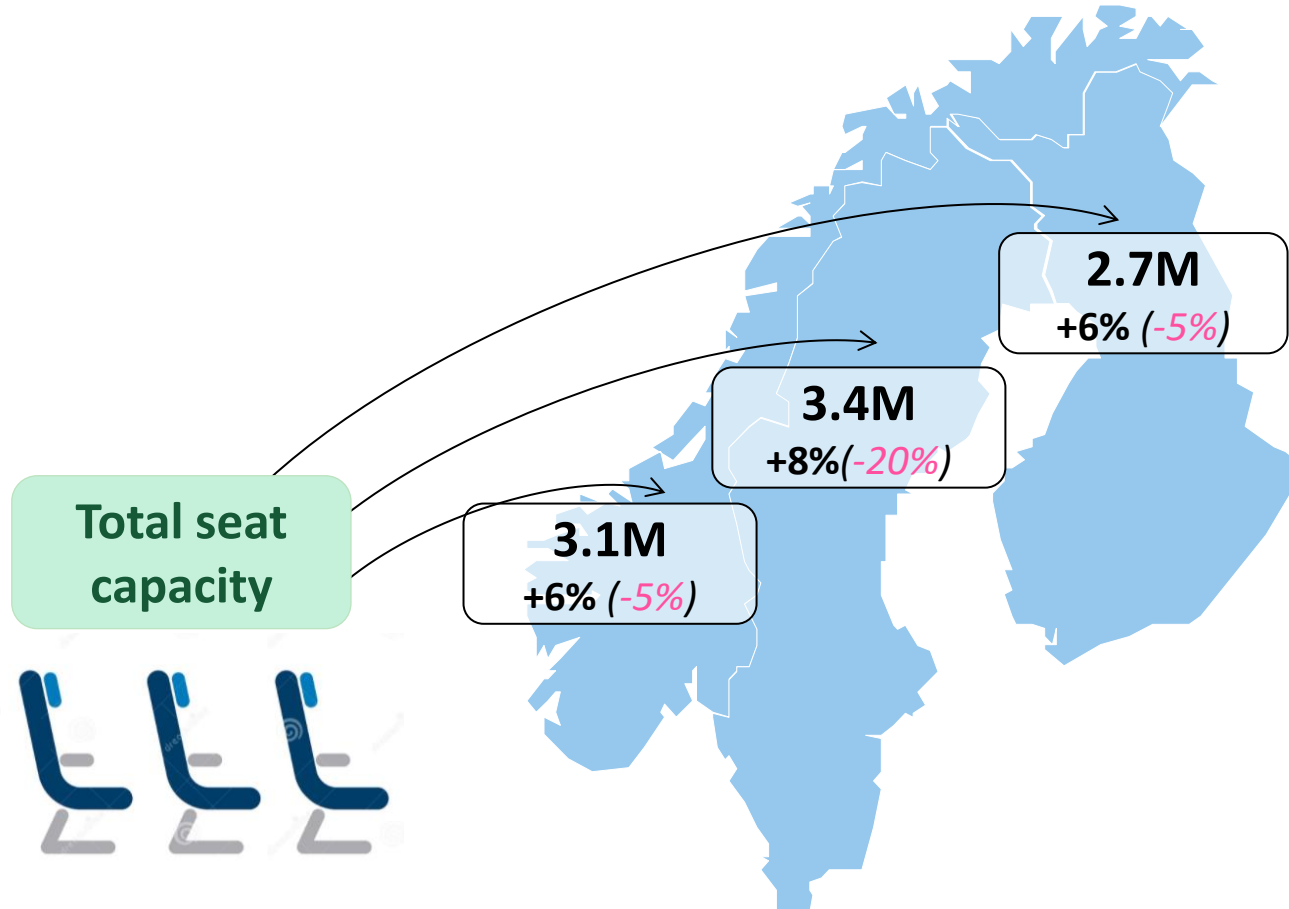
Dec 2025 – Feb 2026

- Overall int'l seat capacity to Finland during the high winter season is showing a 6% increase compared to last winter.
 - Seat capacity from **Europe** is set to grow by 6%, *reaching levels comparable to those before the pandemic*. Weekly flights from Europe will increase to both Helsinki and airports in the Lapland region.
 - Seat capacity from **Asia** rises by 10% from the previous winter, *though it remains 32% lower than the winter of 2019*.
 - Seat capacity from the **USA** is significantly higher than both last winter (+20%) and *the winter of 2019 (+81%)*.



Total Seat capacity to FI, SE & NO for Dec 2025 – Feb 2026

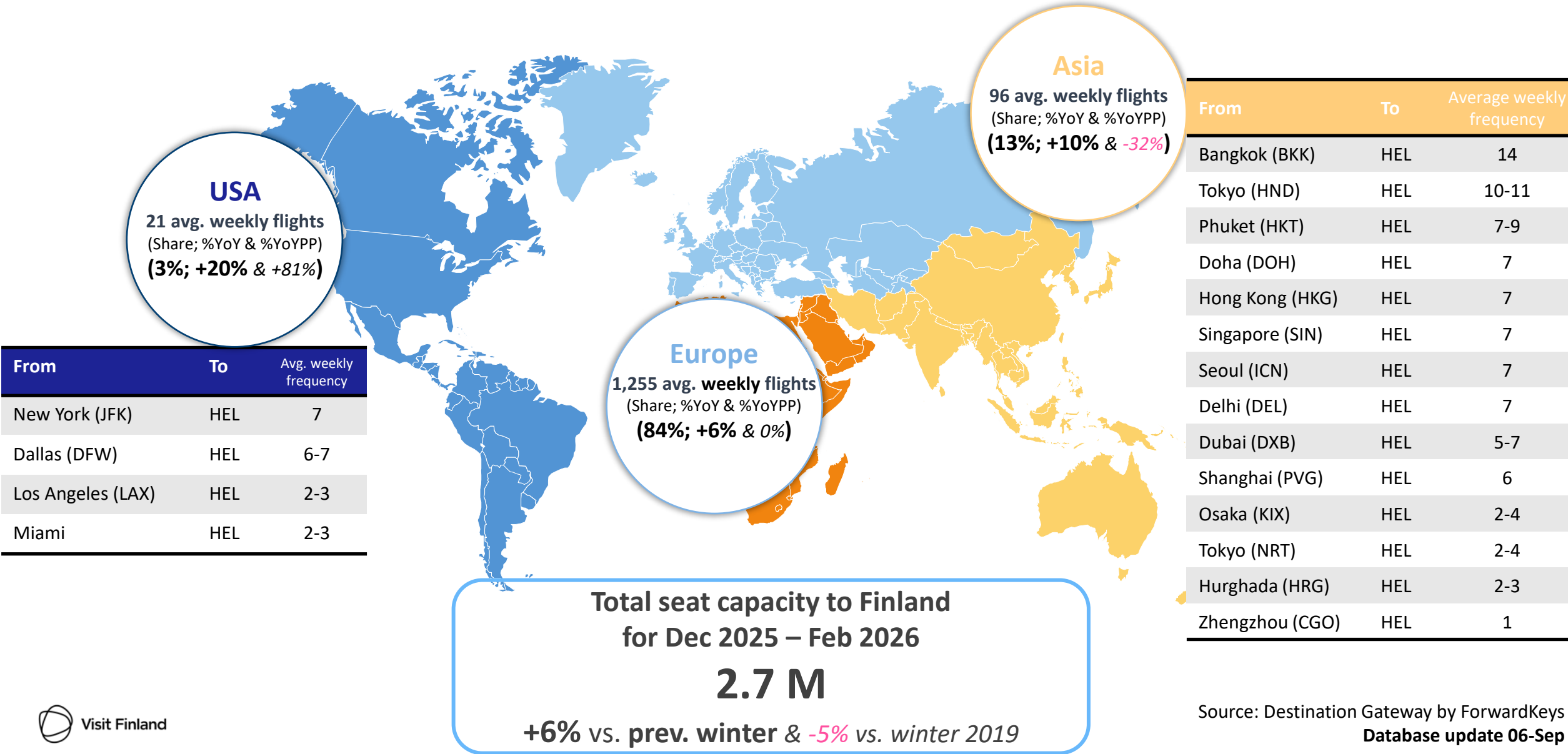
Comparison to previous winter and pre-pandemic



Database update 06-Sep

Direct int'l flights to Finland Dec 2025 – Feb 2026

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

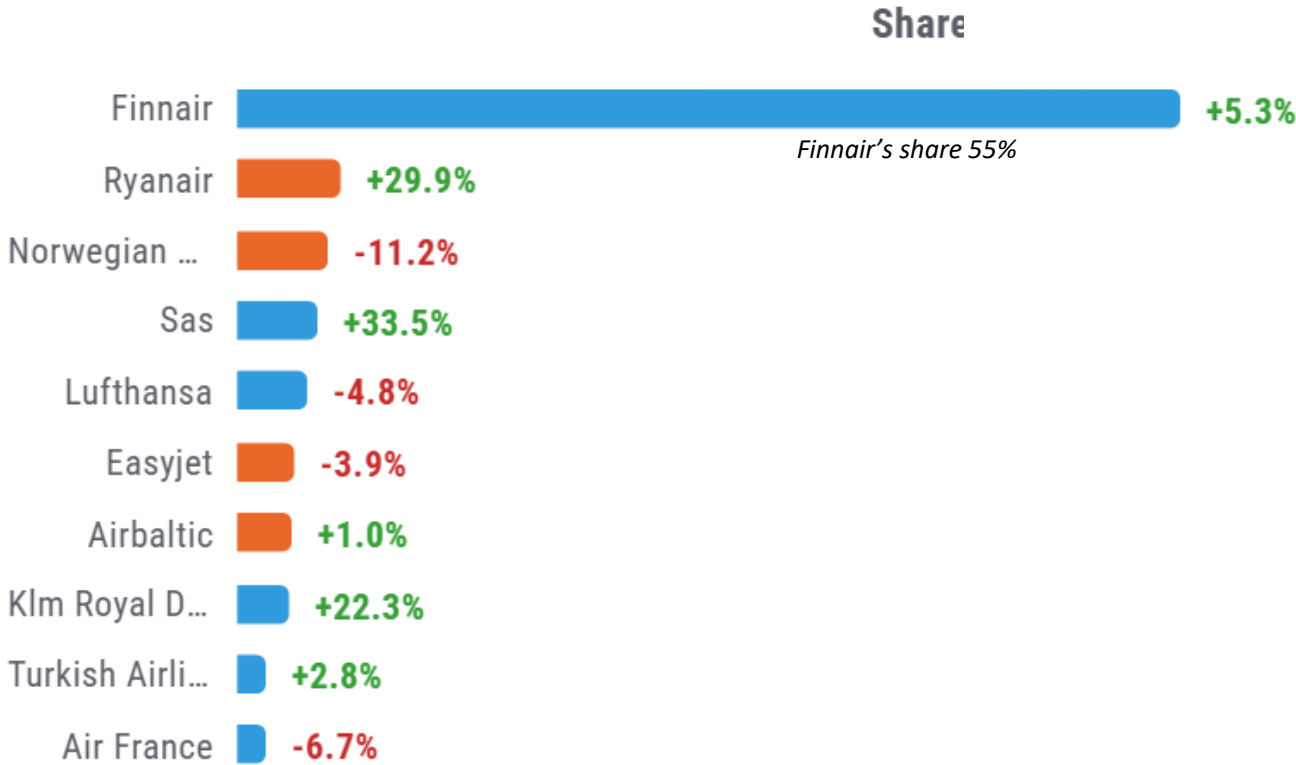


EUROPE to Finland / Dec 2025 – Feb 2026

From (selected countries)	Share	Seat capacity compared to winter 2025	Seat capacity compared to winter 2019
Germany	13%	-1%	-5%
UK	12%	0%	+8%
Sweden	10%	-1%	-33%
Spain	10%	-4%	-14%
Denmark	6%	+40%	+2%
Netherlands	6%	+19%	+29%
France	6%	-7%	+40%
Norway	4%	+20%	+3%
Italy	4%	+9%	+50%
Latvia	4%	+8%	+66%
Poland	4%	+10%	+29%
Switzerland	3%	+7%	+37%
Turkiye	3%	+7%	+93%
Estonia	3%	-3%	+38%
Belgium	3%	+5%	+38%

Top10 airlines operating
from Europe to Finland

+5.7%
YOY for selected airlines



Direct flights to Helsinki & main airports in Lapland

Winter high season (Dec/2025 – Feb/2026)

Direct scheduled flights & TUI flights to Lapland during Dec/2025 – Feb/2026

To	Countries connected	Weekly flights, avg.	Weekly flights YoY	Seat capacity	Capacity, YoY-%	No. of airlines
Rovaniemi	15	115	+14	254,500	+17%	22
Kittilä	11	38	+3	82,300	+8%	16
Ivalo	7	12	+1	24,800	+14%	10
Kuusamo	5	10	+1	23,300	+5%	7

Connectivity to **Helsinki** and the main airports in **Lapland region** is clearly **improving** during the coming winter season.

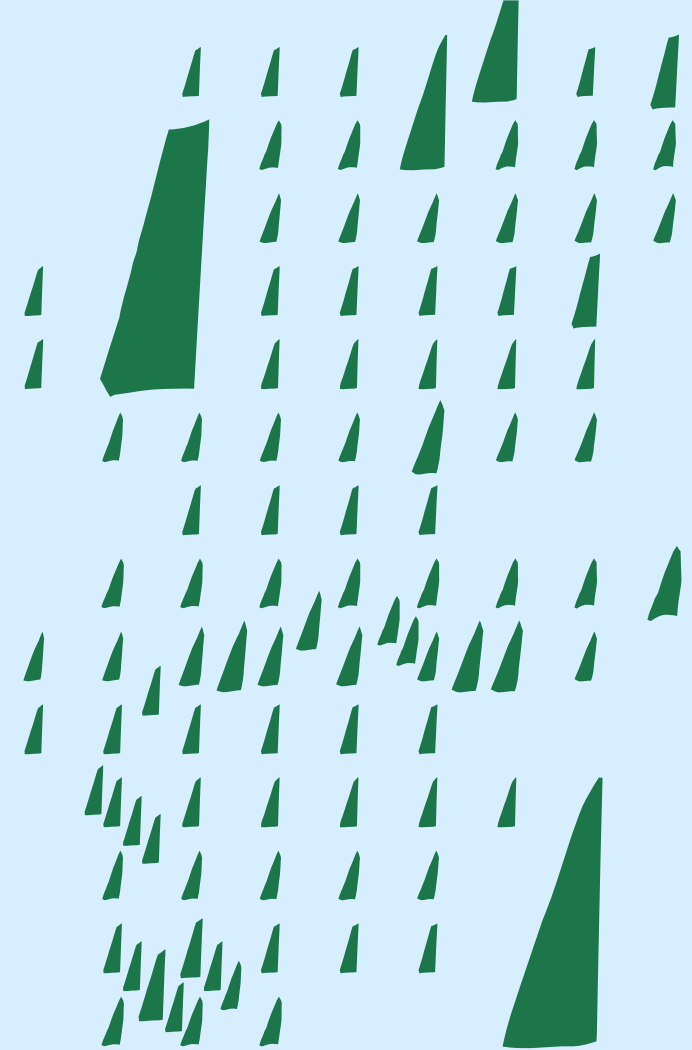
Direct scheduled flights to Helsinki during Dec/2025 – Feb/2026

To Helsinki from	Countries connected	Weekly flights, avg.	Weekly flights YoY	Seat capacity	Capacity, YoY-%	No. of airlines
Europe	24	1,017	+47	1.8M	+3%	15
Asia	10	96	+8	336,900	+8%	6
America	1	21	+3	73,800	+17%	1

Forecast for Flight Arrivals

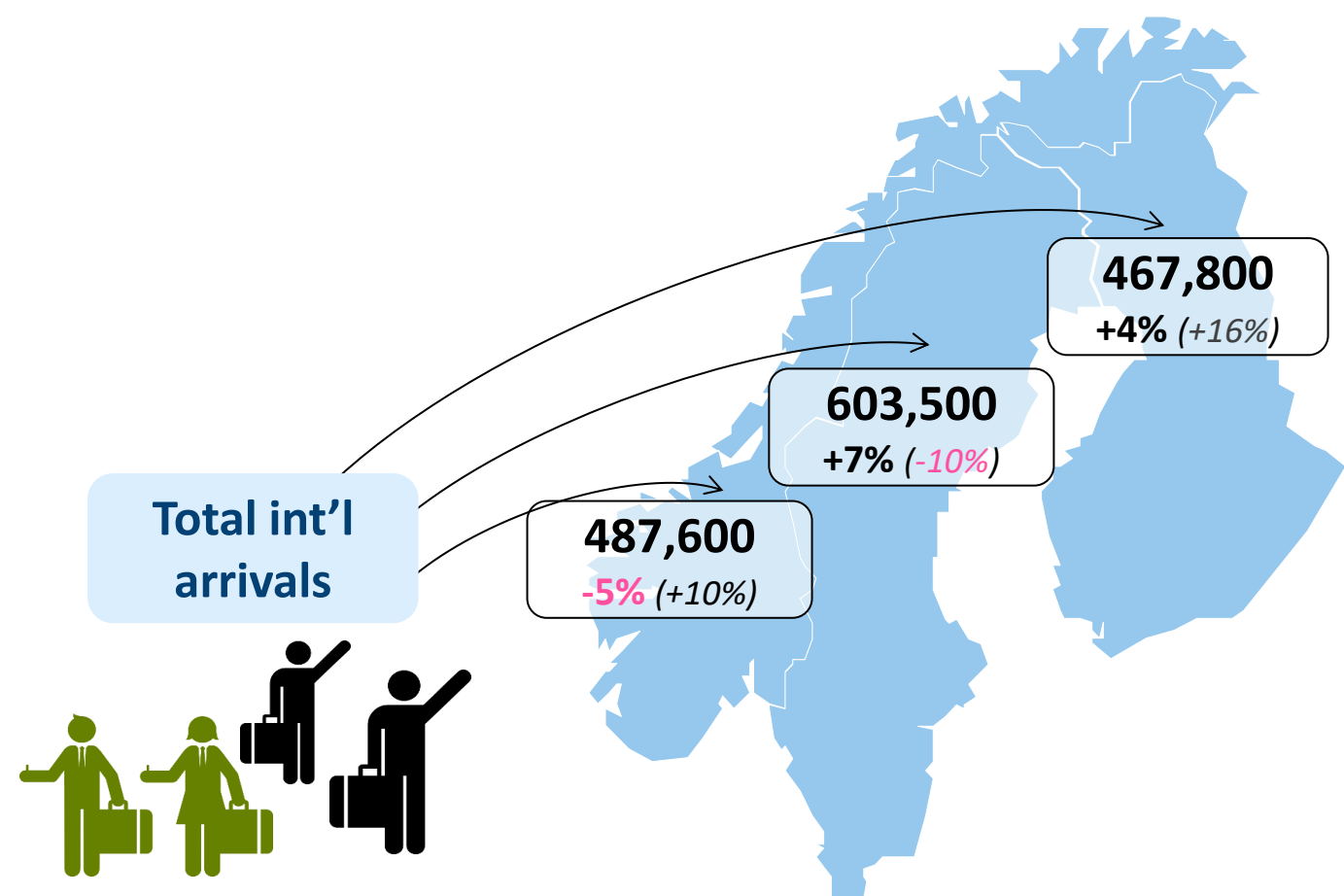
December 2025 – February 2026

- The forecast for **total international flight arrivals to Finland** during the **high winter season** of December 2025 to February 2026 indicates **growth** compared to both the previous winter and the pre-pandemic winter period.
 - Arrivals from the **UK, Netherlands, Spain, Switzerland, Denmark, USA, Poland, and Ireland** are projected to surpass levels seen in both the previous winter and in 2019.
 - Connectivity to Helsinki and Lapland is clearly improving compared to previous winter, so the **forecast for arrivals** especially to **Lapland is very positive**.
- Flight arrivals to **Sweden** are anticipated to **rise compared to last winter**, though they are expected to remain below pre-pandemic figures.
- While flight arrivals from **Norway** have consistently increased on a year-on-year basis each season since the pandemic, a **decline is expected this winter** compared to the previous year.



Outlook for total int'l arrivals to FI, SE & NO for Dec/2025 – Feb/2026

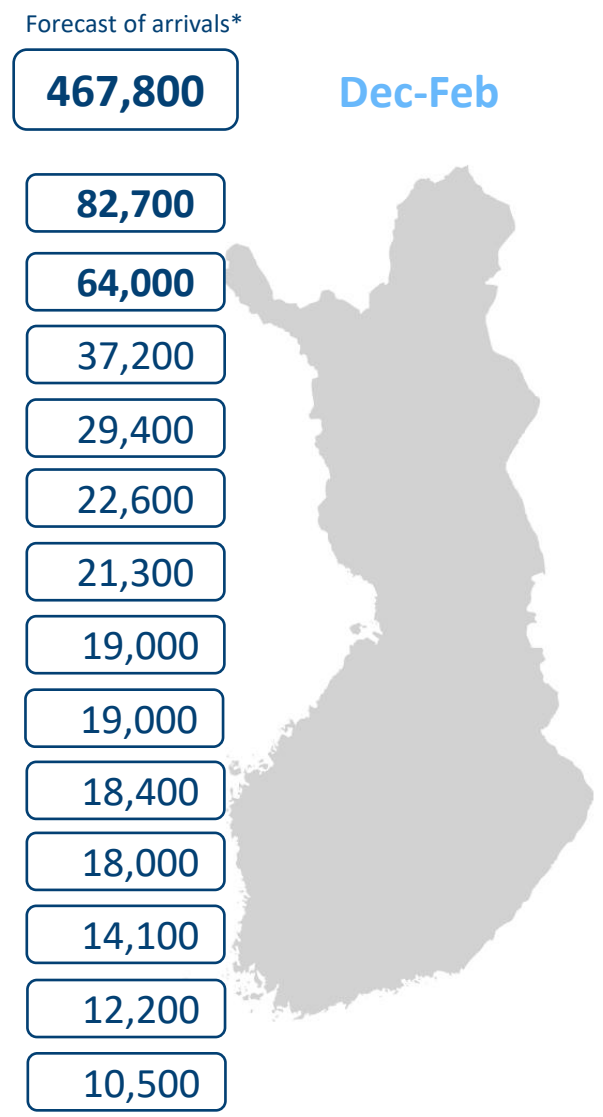
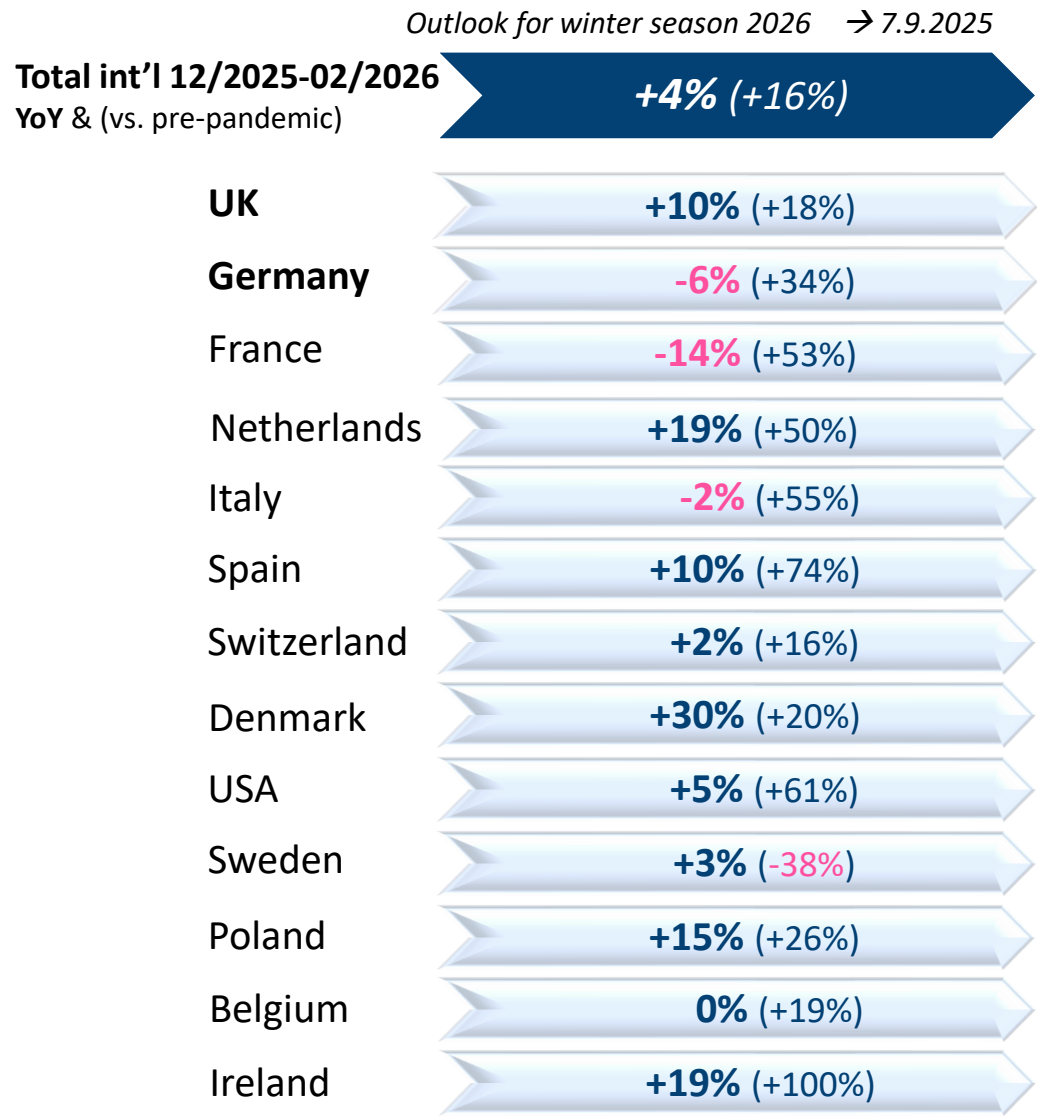
Comparison to previous winter and pre-pandemic



Database update 07-Sep

Follow up on the outlook of flight arrivals* to Finland in Dec/2025 – Feb/2026

compared to previous winter & (pre-pandemic)



Forecast for total int'l arrivals to Finnish airports during Dec/2025 – Feb/2026

✈️ Worldwide (excl. domestic) → Helsinki (HEL)

Filtered period

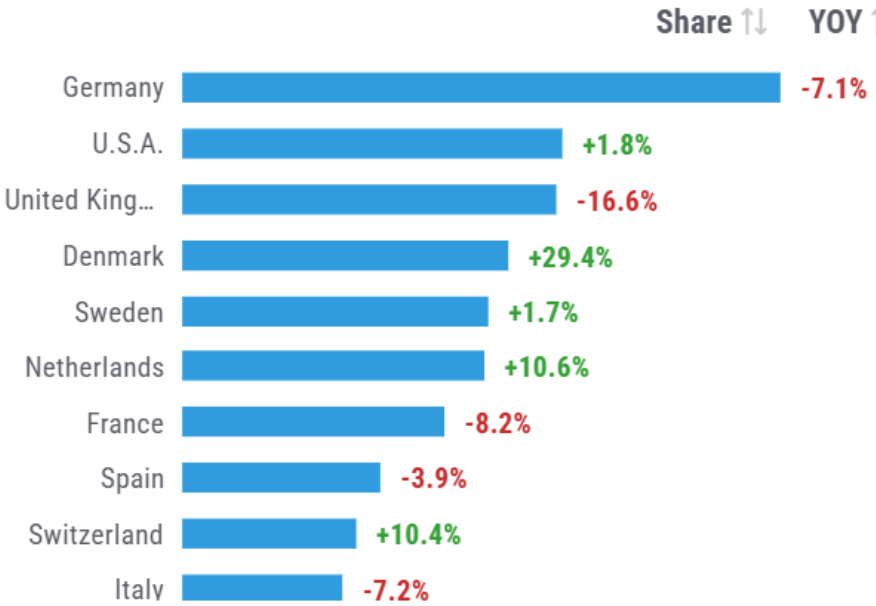
01 Dec 2025 - 28 Feb 2026

202,035

tourist arrivals

-1.5%

YOY for selected origins



Database update 07-Sep

✈️ Worldwide (excl. domestic) → Finland			
Filtered period 01 Dec 2025 - 28 Feb 2026			
467,818		+3.5%	
tourist arrivals		YOY for selected origins	
Arrival destination	Arrivals outlook for 12/2025-02/2026	Share of int'l arrivals	Change vs. 12/2024-02/2025
Helsinki	202,000	43.2%	-2%
Rovaniemi	133,100	28.5%	+10%
Kittilä	52,600	11.2%	+3%
Ivalo	28,300	6.0%	-1%
Kuusamo	20,500	4.4%	+16%
Oulu	9,300	2.0%	-1%
Turku	8,000	1.7%	+29%
Vaasa	4,100	0.9%	+1%
Kuopio	2,900	0.6%	-2%
Tampere	2,100	0.4%	+9%
Kajaani	1,900	0.4%	+20%

To Joensuu, Jyväskylä, Kemi/Tornio, Kokkola/Pietarsaari, Lappeenranta, Mariehamn, Pori, and Savonlinna less than one thousand bookings for winter high season 2026

