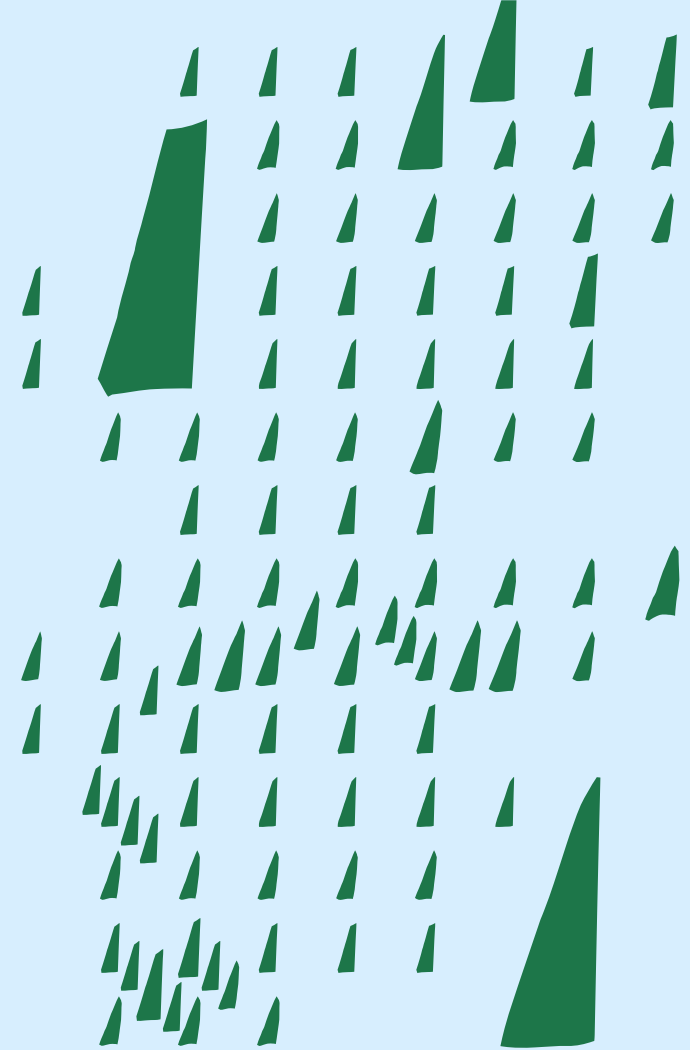
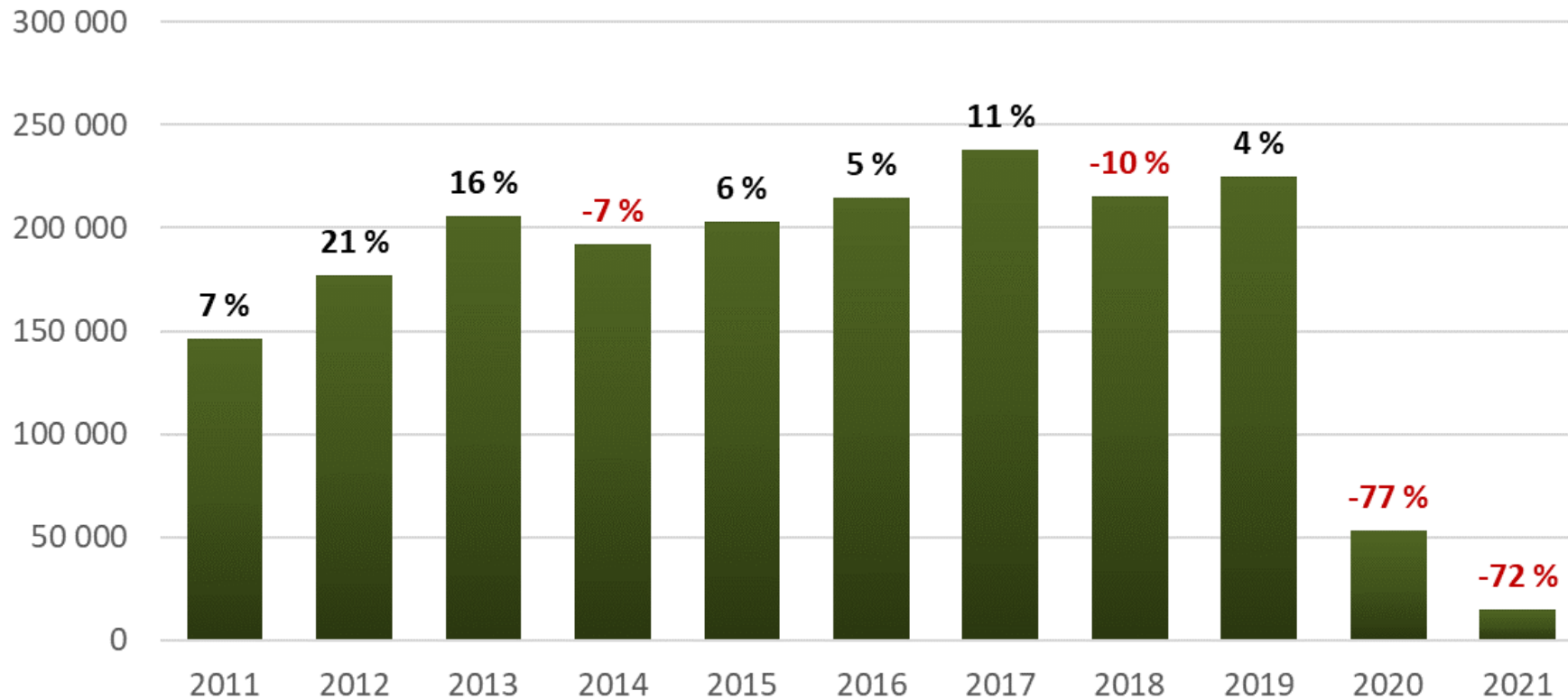


Japan insights

- **Overnights Finland**
- **Digital Demand – Travel Related Internet Searches**
- **Forward Keys – Flight bookings and Capacity data**
- **Oxford Economics – Recovery Forecast**



Japan – Overnights in Finland 2011-2021



2021

14,700 nights
No. 25 in rankings
YoY change -72%

2019

225,000 nights
2021 vs. 2019 -93%

Total overnights Jan-Sep22 :

23,700

-86% vs. Jan-Sep19

September
2022

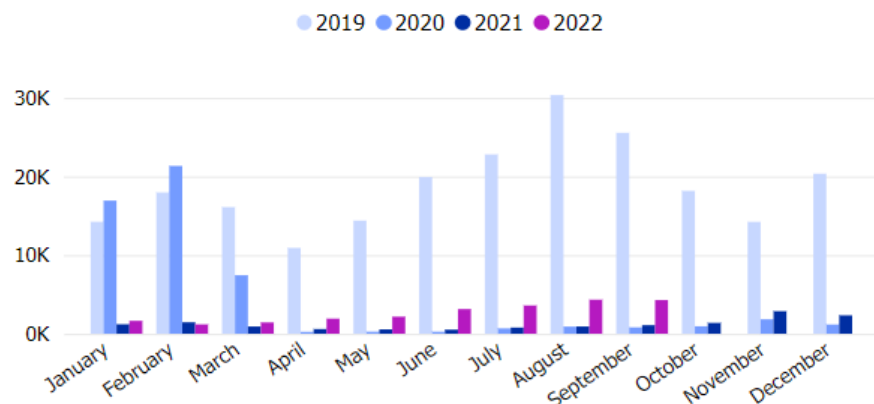
4. OVERNIGHTS IN REGIONS BY TARGET MARKETS

VISIT
FINLAND

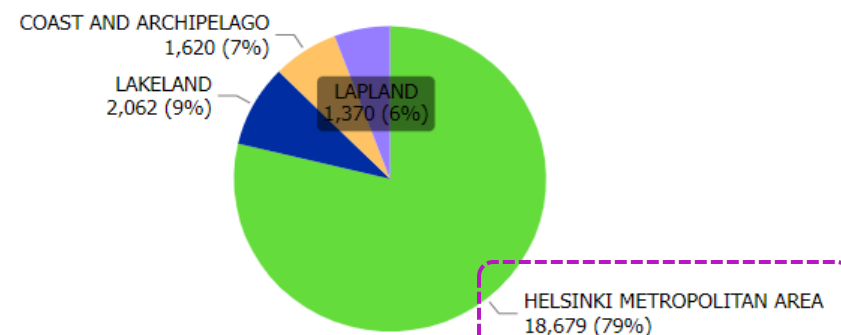
»
Filters

Target market Japan	Region	Monthly nights spent	Monthly YoY change (%)	Cumulative nights spent	Cum. YoY change (%)
Year 2022	Uusimaa 1 (Helsinki Metropolitan Area)	3,398	266 ▲	18,679	236 ▲
Month September	Lapland	205	294 ▲	1,205	237 ▲
	Pirkanmaa	120	1100 ▲	649	1224 ▲
	Varsinais-Suomi	217	804 ▲	625	490 ▲
	Central Finland	62	82 ▲	576	500 ▲
	Uusimaa 2 (excl. Helsinki Metropolitan Area)	27	69 ▲	268	118 ▲
	Päijät-Häme	4	300 ▲	233	-46 ▼
	North Ostrobothnia (excl. Kuusamo)	45	1025 ▲	190	513 ▲
	Central Ostrobothnia	1		166	239 ▲
	Kuusamo	4		165	-57 ▼
	Ostrobothnia	54	5300 ▲	161	1600 ▲
	Etelä-Savo	38	3700 ▲	152	361 ▲
	South Karelia	63	1160 ▲	128	753 ▲
	Pohjois-Savo	5		115	109 ▲
	South Ostrobothnia	4		115	

MONTHLY NIGHTS SPENT IN FINLAND LATEST 4 YEARS



MAIN AREAS' SHARE OF CUMULATIVE OVERNIGHTS



Sources: Statistics Service Rudolf, Statistics Finland

➤ **Helsinki region** is the biggest area for Japanese in Finland, cumulative overnights this year are nearly **19,000** which is **236%** more than in 2021

➤ **Helsinki region's share** is **79%** of total

Top markets in winter season 2022

And change compared to pre-pandemic

High winter season (12-02)

Top10 source markets winter 2021-2022	Dec2018- Feb2019	Dec2021- Feb2022	Change 2022 vs. 2019
1. United Kingdom	334 900	278 600	-17%
2. France	161 700	180 300	+11%
3. Germany	151 300	133 100	-12%
4. Netherlands	106 700	111 300	+4%
5. Spain	59 400	55 300	-7%
6. Estonia	58 200	47 400	-19%
7. Belgium	30 300	45 900	+51%
8. Italy	42 900	45 200	+5%
9. United States	53 800	39 600	-26%
10. Switzerland	51 800	37 800	-27%
...			
29. Japan	49 900	5 200	-90%

Top destinations from Japan

Winter 2021-2022

Helsinki	1 900
Vantaa	700
Rovaniemi	500

Winter 2018-2019

Helsinki	23 000
Inari-Saariselkä	9 200
Rovaniemi	6 300

Top markets in summer season 2022

And change compared to pre-pandemic

High summer season (06-08)

Top10 source markets summer 2022	Jun- Aug2019	Jun-Aug 2022	Change 2022 vs. 2019
1. Sweden	255 200	235 800	-8%
2. Germany	270 300	229 100	-15%
3. United States	109 900	103 800	-6%
4. United Kingdom	90 800	74 500	-18%
5. Norway	73 400	68 200	-7%
6. Estonia	69 400	60 400	-13%
7. Russia	243 400	60 100	-75%
8. Switzerland	64 400	54 100	-16%
9. France	64 100	53 800	-16%
10. Netherlands	62 300	52 400	-16%
...			
25. Japan	73 100	11 100	-85%

Top destinations from Japan

Summer 2022	
Helsinki	7 000
Vantaa	1 500
Espoo	500

Summer 2019	
Helsinki	58 100
Vantaa	3 600
Espoo	1 700

7. NORDIC COUNTRIES' SHARE OF YEARLY AND MONTHLY OVERNIGHTS BY TARGET MARKETS

Nationality

Japan

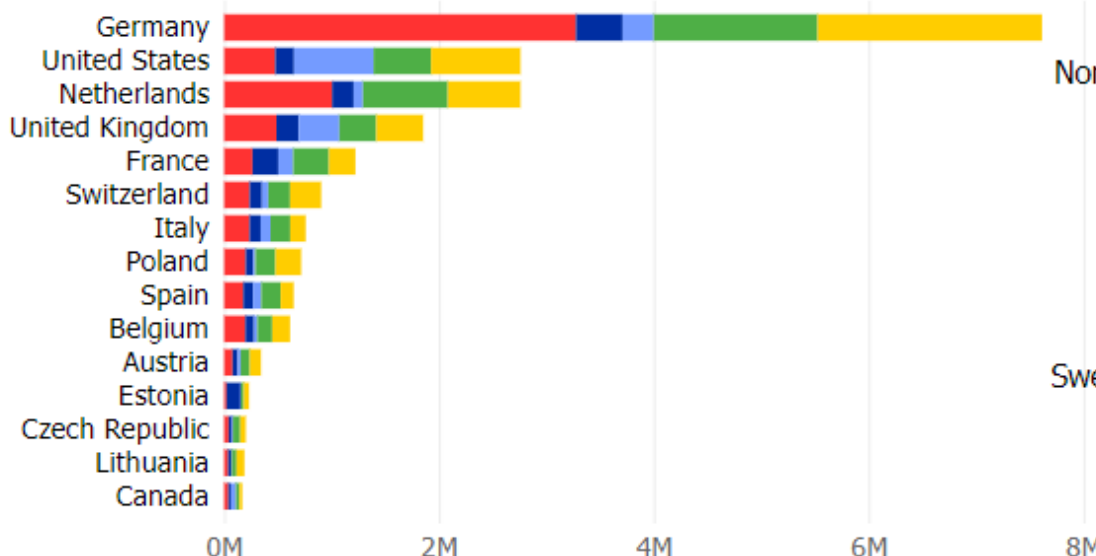
VISIT
FINLAND

>> Filters

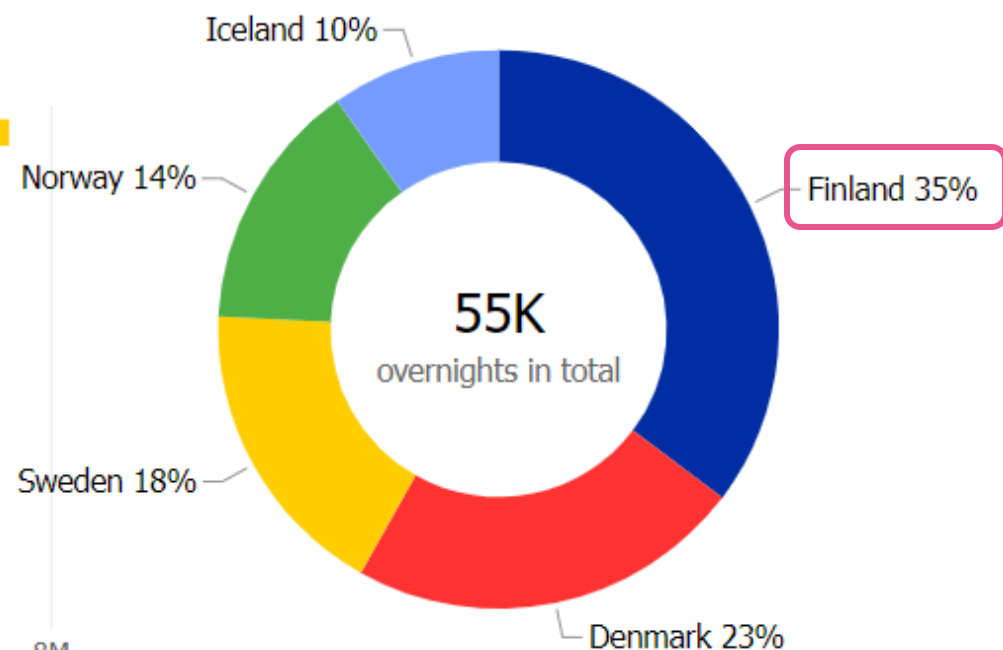
2015		2016		2017		2018		2019		2020		2021		2022	
January	February	March	April	May	June	July	August	September	October	November	December				

NORDIC COUNTRIES' TOP TARGET MARKETS

● Denmark ● Finland ● Iceland ● Norway ● Sweden



Monthly overnight statistics for Iceland include hotels only.



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



Nordic Comparison of Nights Spent, 7. Share of Overnights

Data updated on 10/10/22, 10:14 AM

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Visit Finland

[Link to the Nordic report: Pohjoismaiden vertailu - Business Finland](#)

2. NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality

Japan

Year

2022

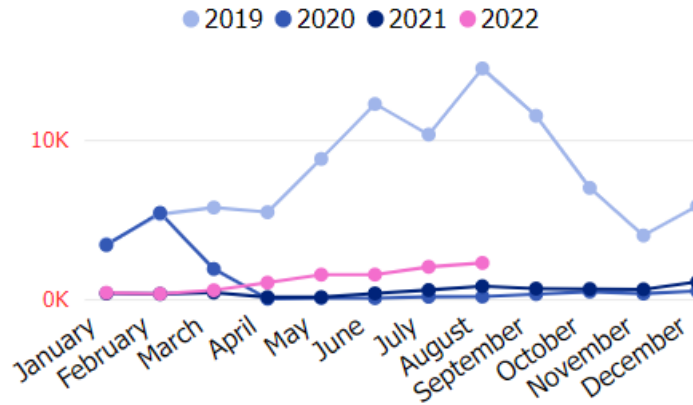
Month

August

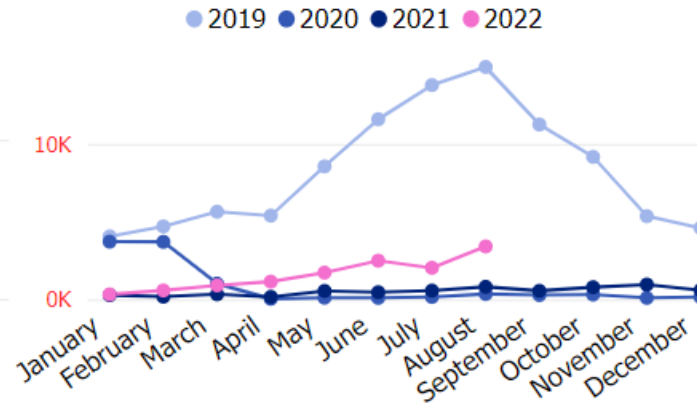
VISIT
FINLAND

Filters

SWEDEN

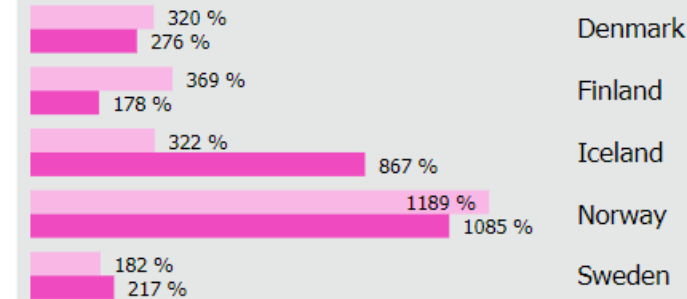


DENMARK

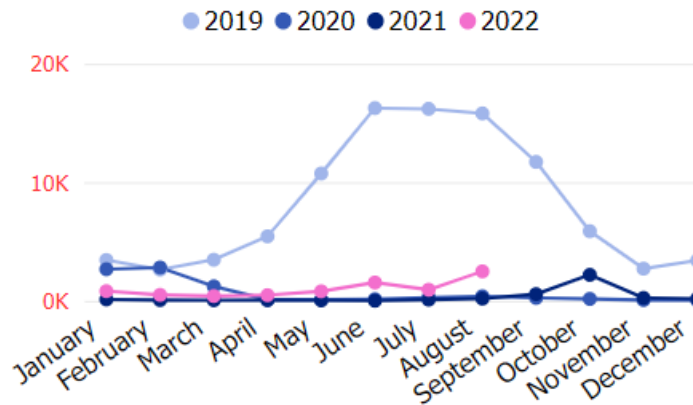


YoY CHANGE IN MONTHLY AND CUMULATIVE OVERNIGHTS, %

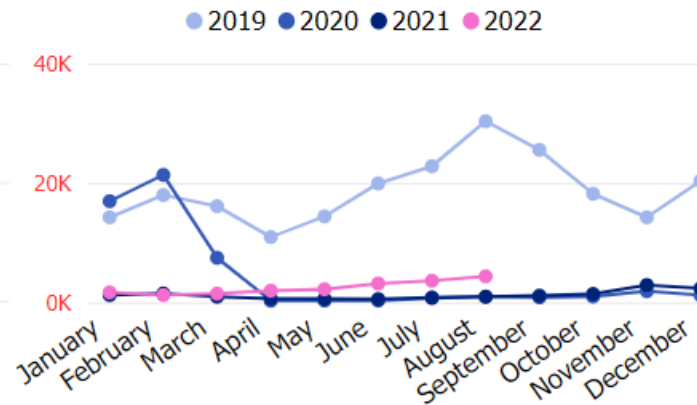
Monthly change Cumulative change



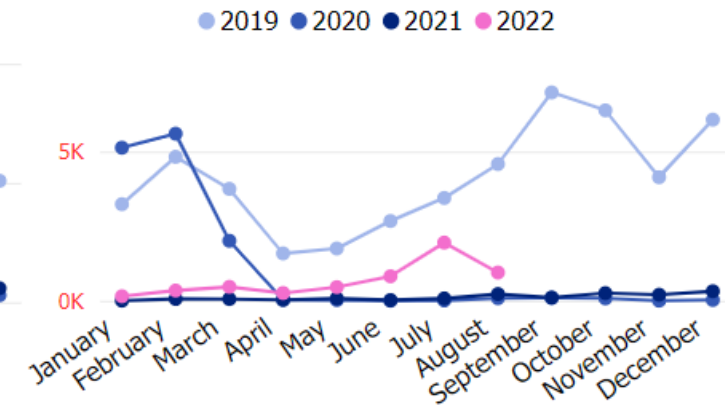
NORWAY



FINLAND



ICELAND



Monthly overnight statistics for Iceland include hotels only.

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



Nordic Comparison of Nights Spent, 2. Nordic comparison

Data updated on 10/10/22, 10:14 AM





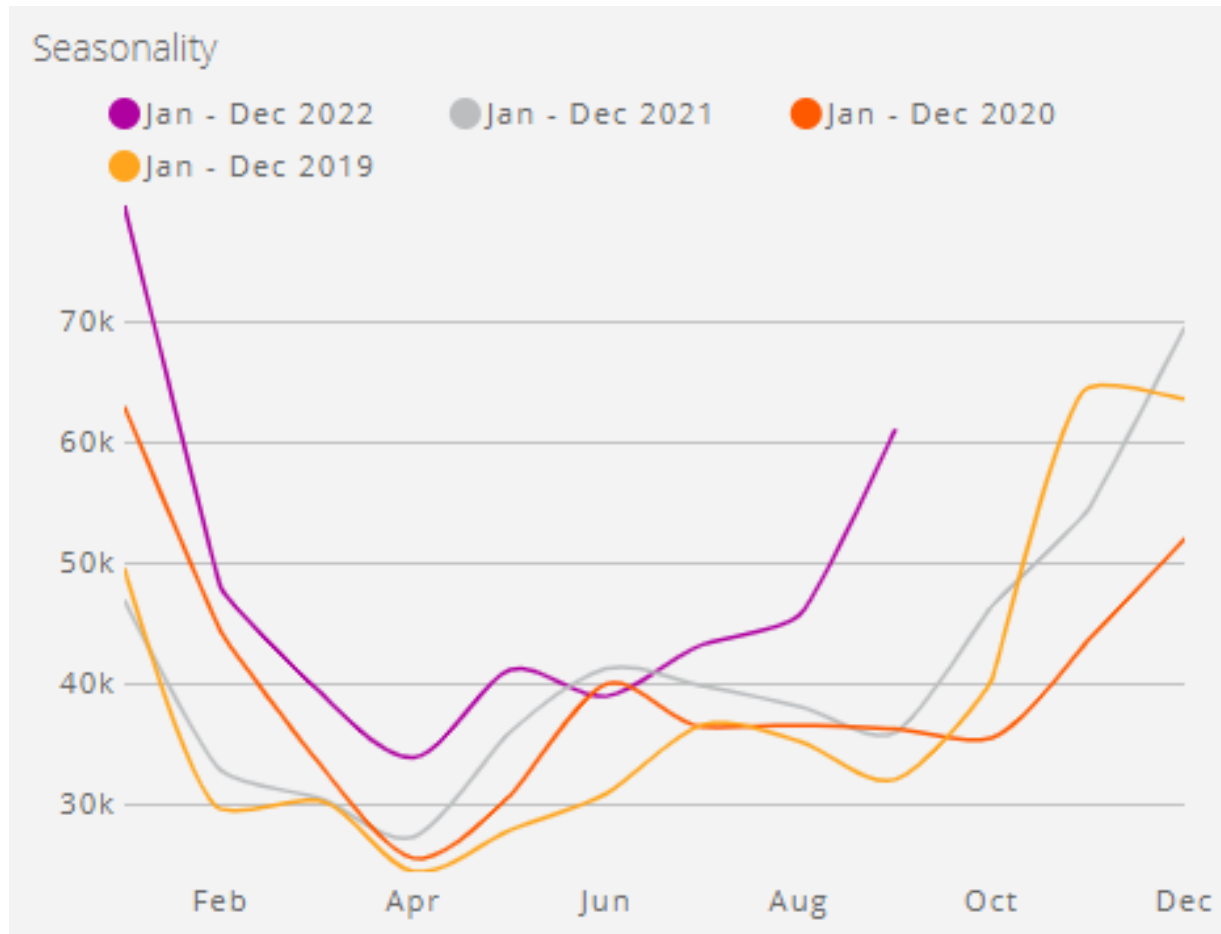
Digital Demand – Travel Related Internet Searches

Q1/2022 – Q3/2022

Japanese searches in Q1-Q3 2022

Q1/2022

Travel related searches from Japan have remained in an excellent level despite the travel restrictions, so interest towards Finland is very strong.



Rank	Flag	Target Market	Searches	Growth
1		Germany	167,283	51.7%
2		United States	151,590	40.5%
3		Japan	122,944	22.5%
4		United Kingdom	102,743	50.5%
5		Italy	76,999	25.4%
6		France	75,588	52.8%
7		Spain	56,833	36.3%
8		Netherlands	54,827	92.1%

Q2/2022

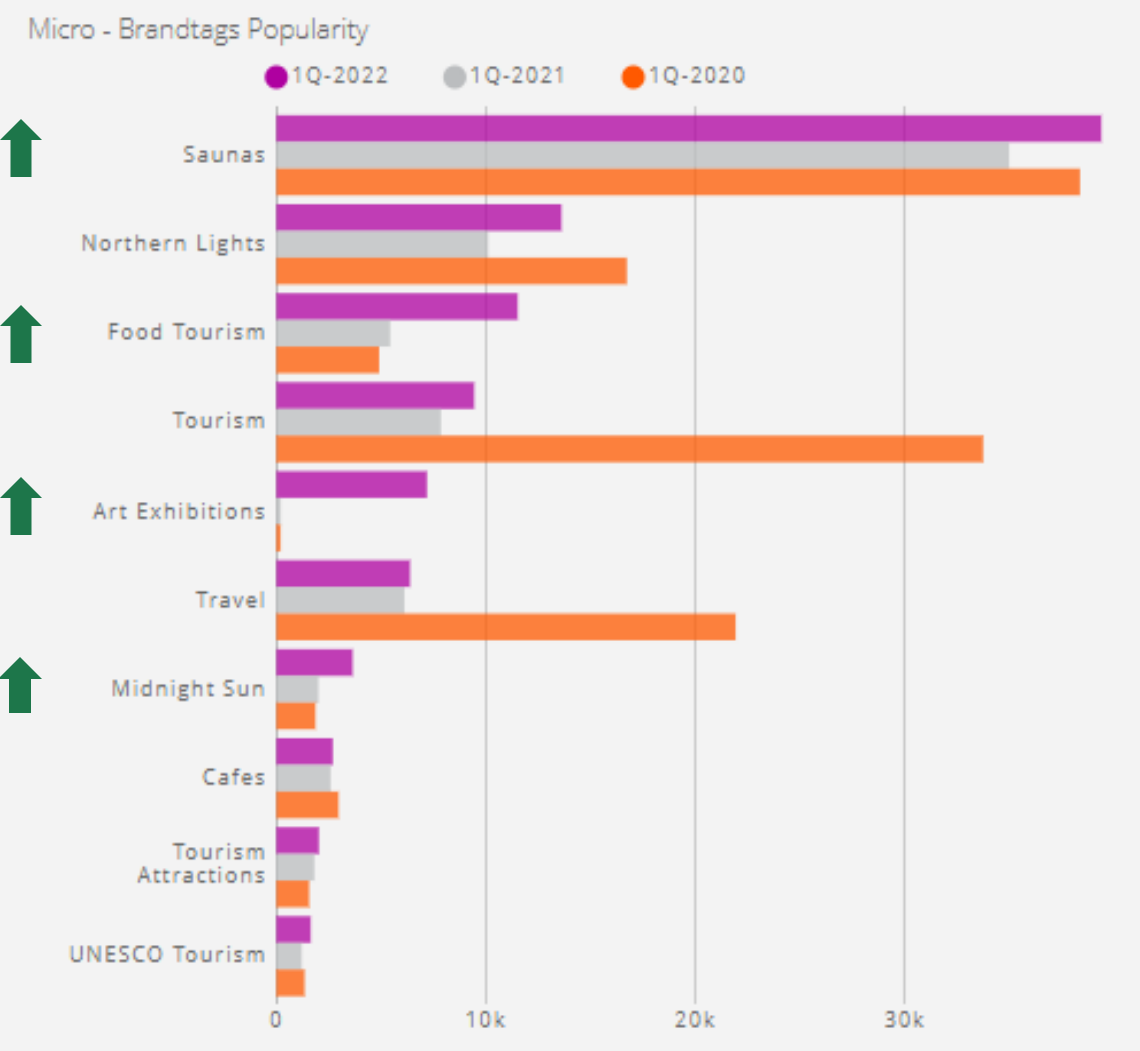
Rank	Flag	Target Market	Searches	Growth
1		United States	134,907	39.5%
2		Japan	119,932	16.7%
3		Germany	113,935	9.1%
4		United Kingdom	68,831	27.8%
5		Italy	59,885	15.9%
6		France	54,190	26.7%
7		Spain	52,910	35.9%
8		Estonia	41,686	11.6%

Q3/2022

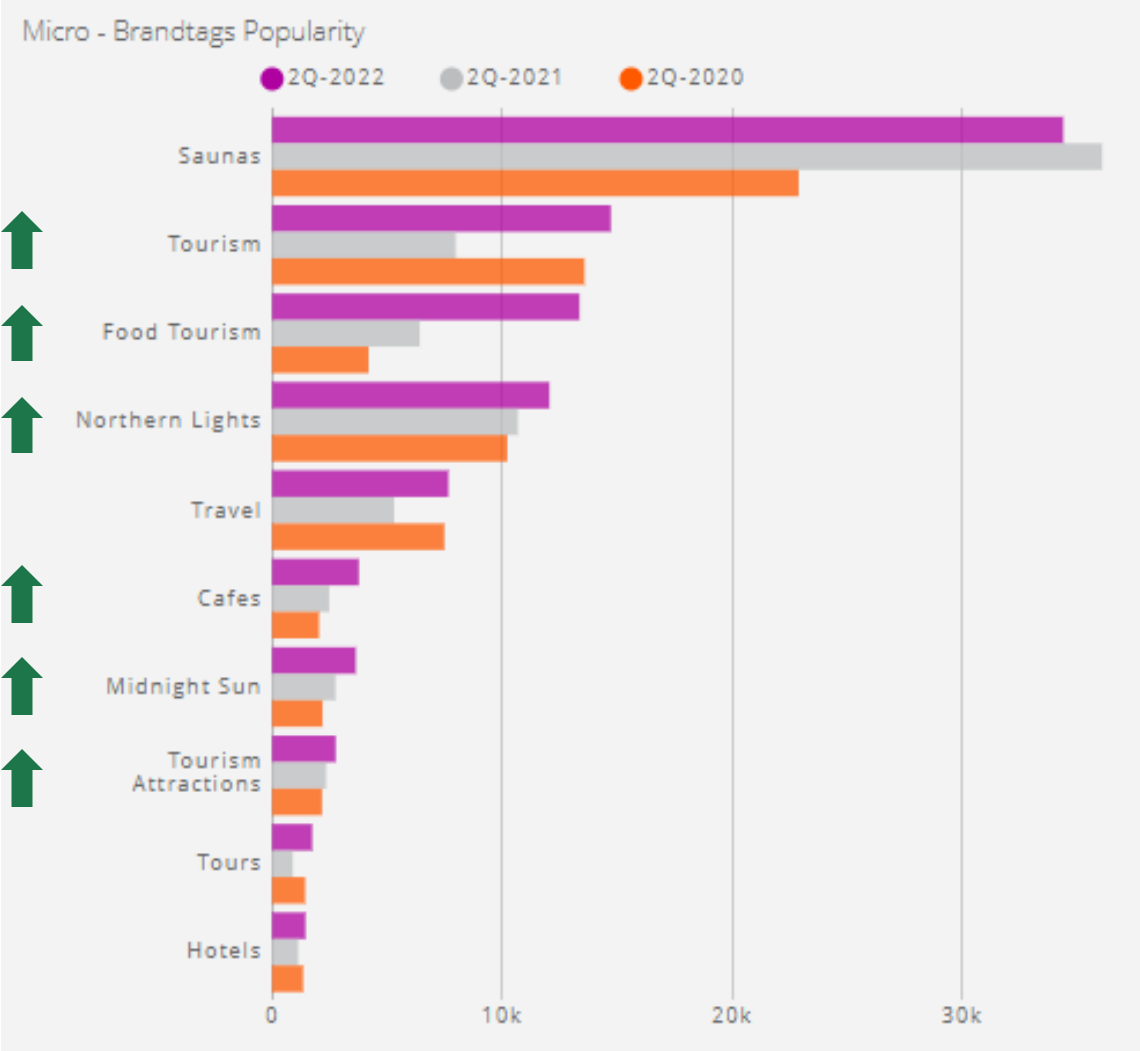
Rank	Flag	Country	Searches	Growth
1		Germany	150,084	31.8%
2		Japan	143,071	19.4%
3		United States	128,685	23.4%
4		United Kingdom	86,984	21.7%
5		Italy	67,554	17.7%
6		France	66,196	32.8%
7		Spain	64,225	38.6%
8		Estonia	47,105	-1.1%

Japan: Most searched topics

Q1/2022

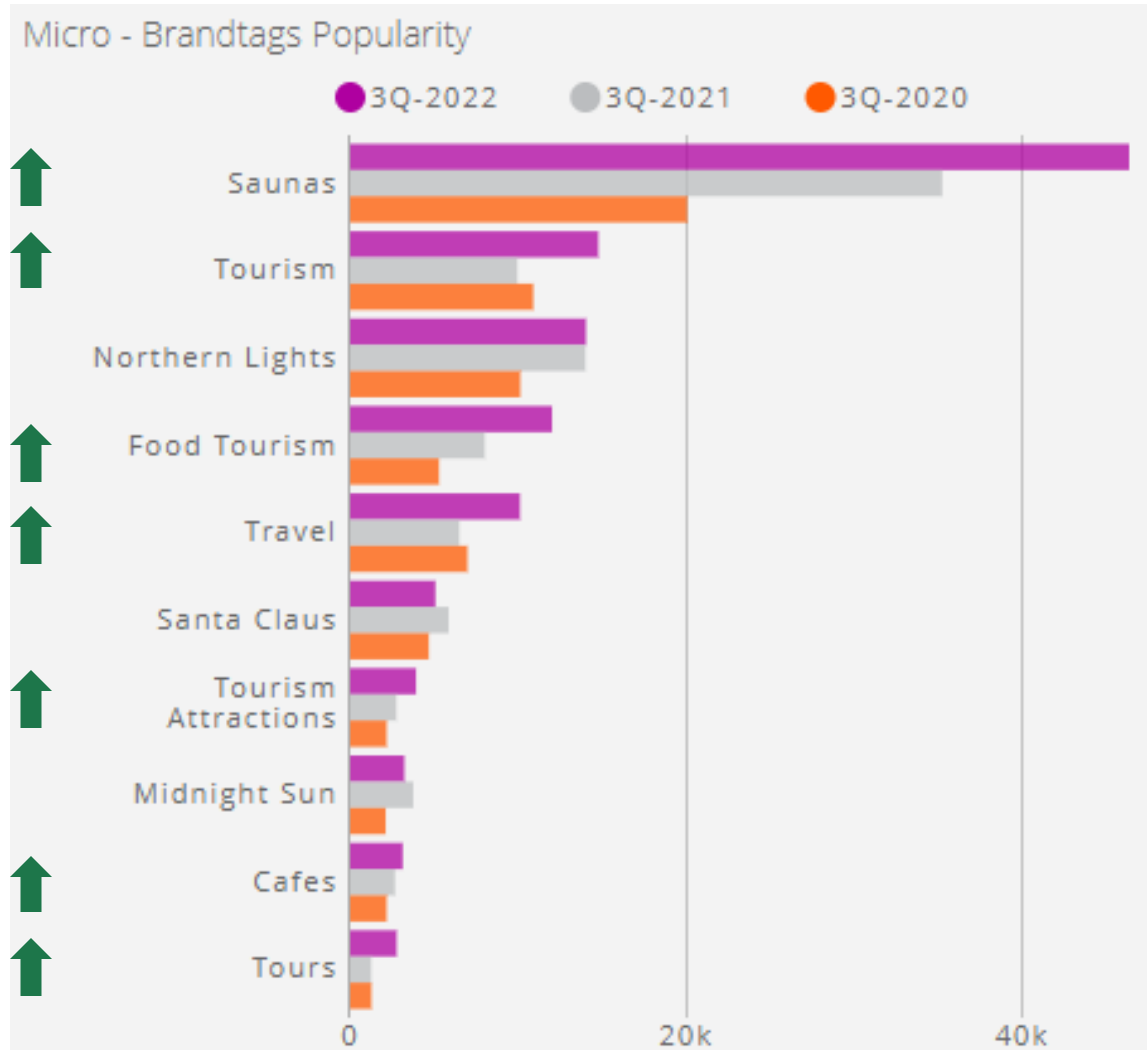


Q2/2022



Japan: Most searched topics

Q3/2022



- Japan is the leading market on searches for **saunas**, and the interest just seems to get stronger
- Also on searches for the **northern lights** Japanese are among the top3
- Japan is the only country where searches for **food tourism** or **cafes** count for the top10 themes
- Japan also tops the list on searches for the **midnight sun**



ForwardKeys **Seat capacity to Finland**

November/2022 – February/2023

Direct flights to Finland November 2022 - February 2023

and change in seat capacity compared to pre-pandemic

USA

16 avg. weekly flights

(Share; %YoYPP Var)

(3%; +16%)

From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	3-4
Los Angeles (LAX)	HEL	3
Miami (MIA)*	HEL	3 → 2

*) MIA starts end-Nov with 3 weekly flights, end-Jan to 2 weekly flights

Europe

985 avg. weekly flights

(Share; %YoYPP Var)

(84%; -21%)

Asia

72 avg. weekly flights

(Share; %YoYPP Var)

(13%; -46%)

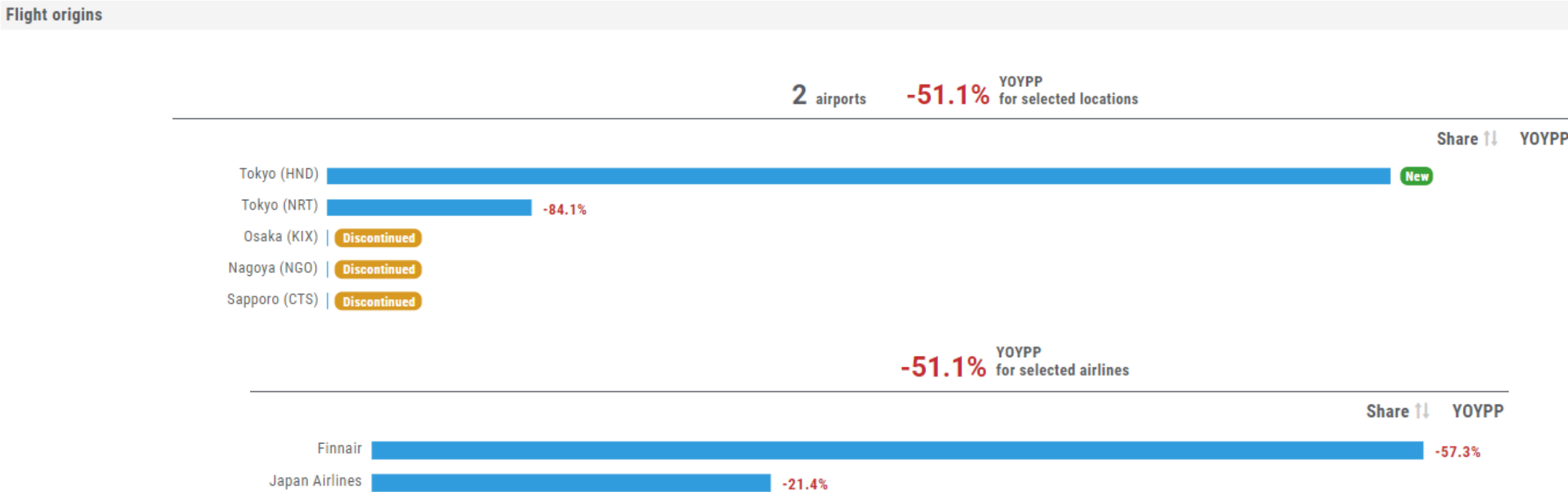
From	To	Average weekly frequency
Tokyo (HND)	HEL	12 → 14
Doha (DOH)**	HEL	3 → 14
Bangkok (BKK)	HEL	11
Singapore (SIN)	HEL	7
Delhi (DEL)	HEL	7
Seoul (ICN)	HEL	5-6
Hong Kong (HKG)	HEL	3
Dubai (DUB)	HEL	3
Mumbai (BOM)	HEL	3
Phuket (HKT)	HEL	1 → 5
Tokyo (NRT)	HEL	2
Shanghai (PVG)	HEL	2
Chengdu (CTU)	HEL	1
Guangzhou (CAN)	HEL	1

**) flight frequency to 14 from mid-Dec

Direct flights from Japan to Finland Nov 2022 - Feb 2023

Comparison with pre-pandemic

- Seat capacity from Japan to Finland for the coming winter season is 50% lower than pre-pandemic
- Both Finnair and Japan Airlines are now operating to/from the Haneda airport which has excellent connections to whole Japan
- Osaka, Nagoya and Sapporo are on hold as the Russian airspace is closed





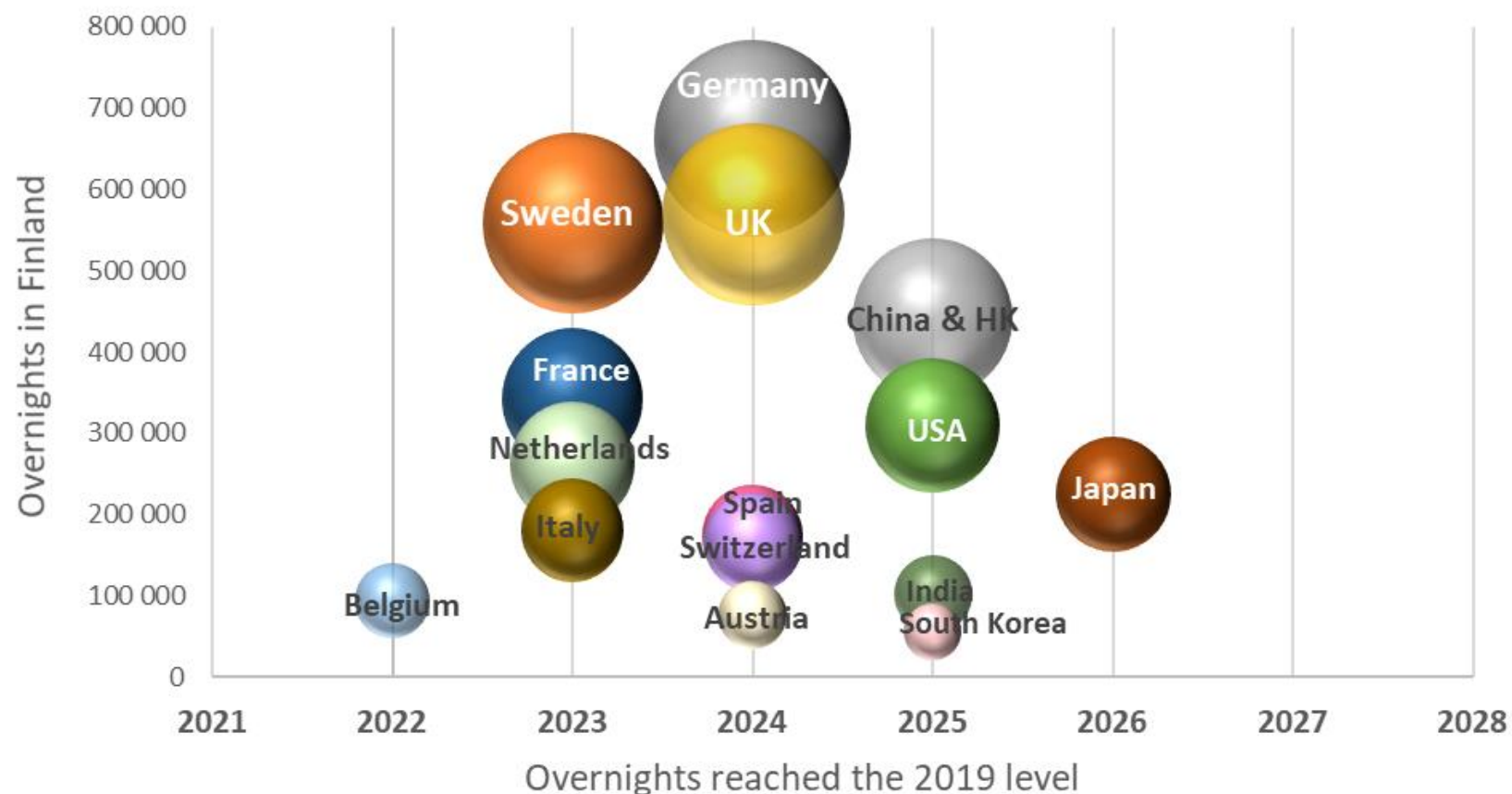
Oxford Economics – Overnights & Spending

Recovery forecasts

Overnights – Recovery to 2019 levels

Databank update October/2022

Recovery timeline - Overnights in Finland reached the level of 2019

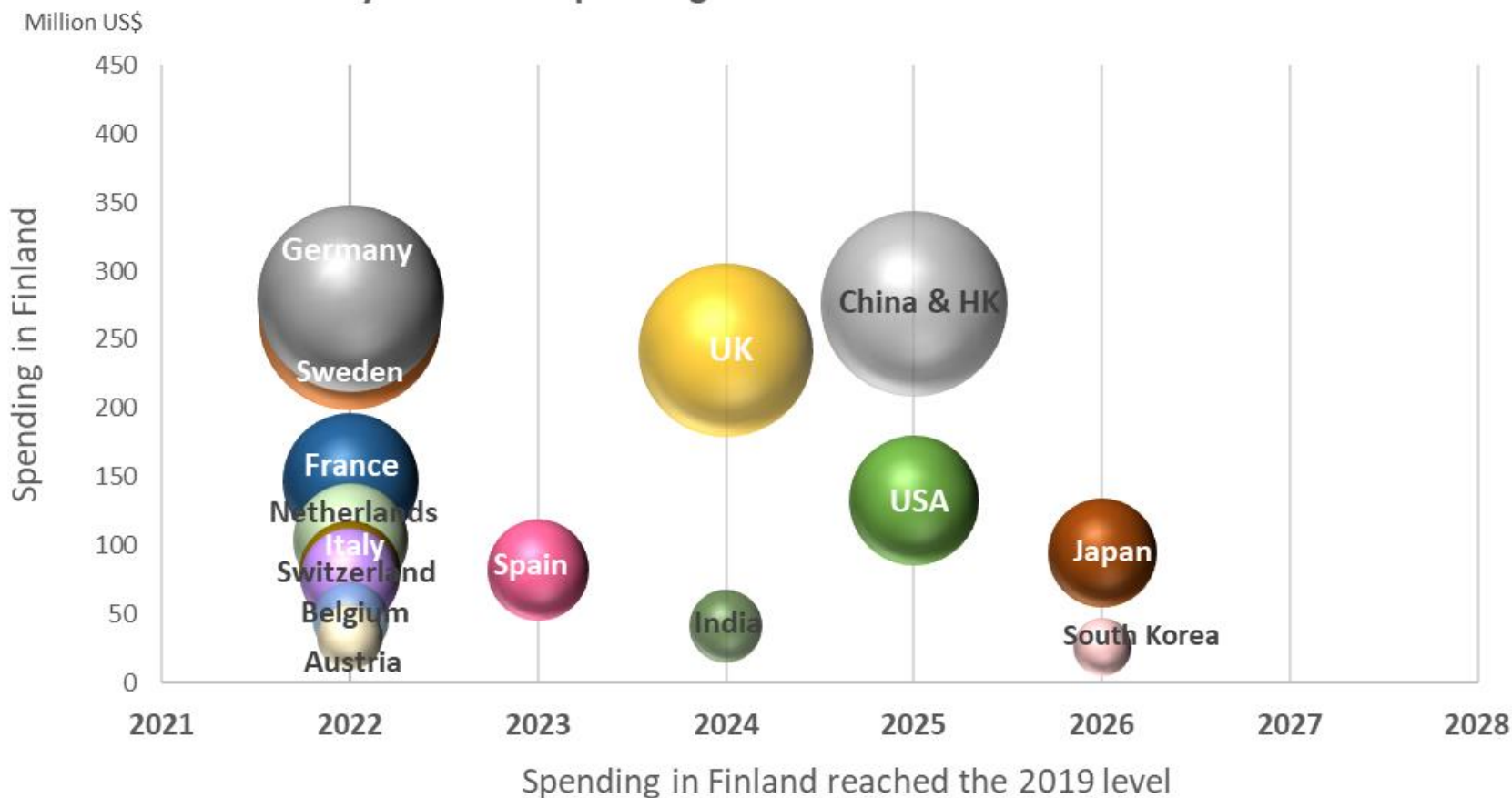


Source: Oxford Economics, databank update Oct 17, 2022

Spending – Recovery to 2019 levels

Databank update October/2022

Recovery timeline - Spending in Finland reached the level of 2019



Source: Oxford Economics, databank update Oct 17, 2022

	Spending (Million US\$) in 2023	comp.to 2019
Sweden	311,3	17 %
Germany	276,2	-1 %
UK	229,3	-5 %
France	174,2	19 %
China	134,6	-55 %
Netherlands	131,1	26 %
USA	108,9	-18 %
Italy	96,7	20 %
Spain	89,1	9 %
Switzerland	84,9	11 %
Belgium	66,1	46 %
Japan	48,9	-48 %
Austria	34,0	4 %
India	29,3	-29 %
South Korea	18,5	-29 %