



Visit Finland

VF monthly follow up

January – September 2023

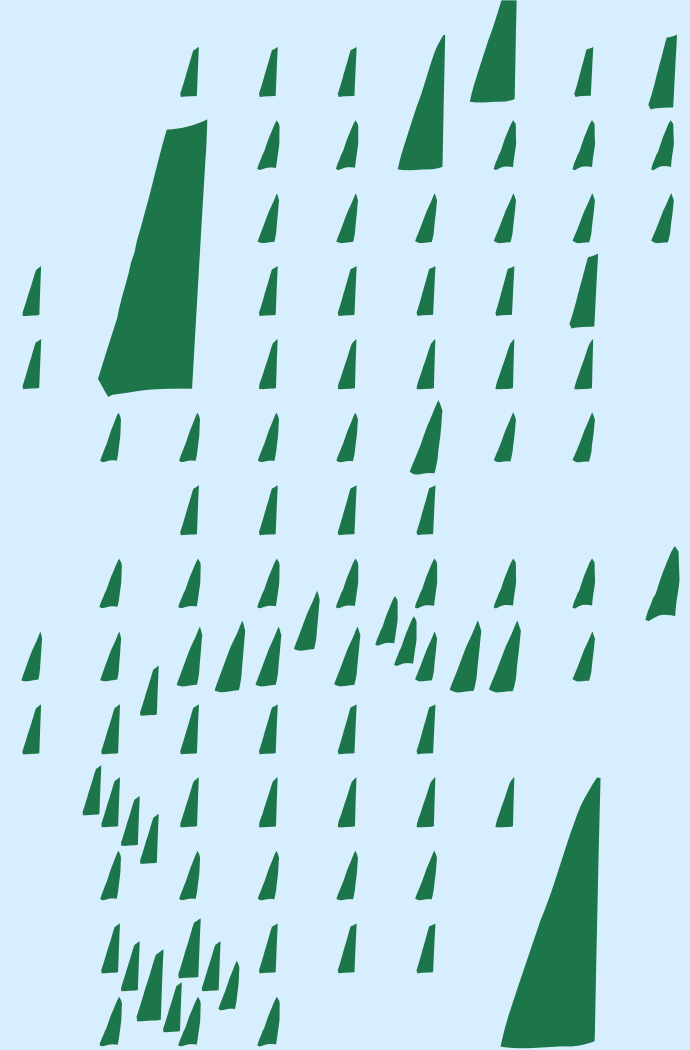
Summary

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

- According to our new **Border survey** (Matkailijamittari), the total number of trips to Finland by foreign visitors was **3.0 million** during **March-September 2023** and the total amount the visitors spent in Finland was **2,270M€**. The median length of stay was **4 nights**, and **73%** of the visitors were travelling for **leisure**.
- **Number of registered foreign overnights** during January-September 2023 were **21% below** the 2019 level. If we leave the Russian travellers out of scope, the overnights were 11% behind 2019 figures.
 - **Germany** and **Sweden** are the biggest source markets.
 - From the main source markets, **Germany, France, USA, the Netherlands, Belgium**, and **Austria** have all **exceeded** the number of overnights they had before the pandemic (Jan-Sep 2019).
- **International flight bookings** to Finland for **the coming winter** (Nov-Feb) are currently **6% above** the 2019 level.
 - **Bookings to Lapland show strong growth** for the winter season. **Germany** is clearly number one of the source markets, and **German bookings are growing strongly to each destination in Lapland**. Other very strong performers are **France, USA, the Netherlands**, and **Spain**.
 - It seems that Norway and Sweden are also benefitting from the very good winter image Finland has, as the bookings to especially Norway show strong growth compared to pre-pandemic.
- **Flight connectivity to Finland** is closer to the pre-pandemic level during winter season, and the gap in seat capacity narrows down from the summers' -26% to **-18%** in comparison to pre-pandemic.
 - Flight connections to Lapland are continuously getting better for the winter season as several airlines have included direct flights to airports in Lapland. This winter there will be **direct scheduled flights from 15 different countries** to the destinations (RVN, KTT, IVL, KAO) in **Lapland**.
- According to Oxford Economics' most recent forecast, **overnights** from **Germany, USA, France, the Netherlands**, and **Austria** will this year achieve at least the same level than in 2019. Travel from **Belgium** to Finland recovered already last year.

Border Survey

Cumulative March-September 2023



Border Survey / March-September 2023

Foreign visitors in Finland

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



Border Survey / monthly March-September 2023

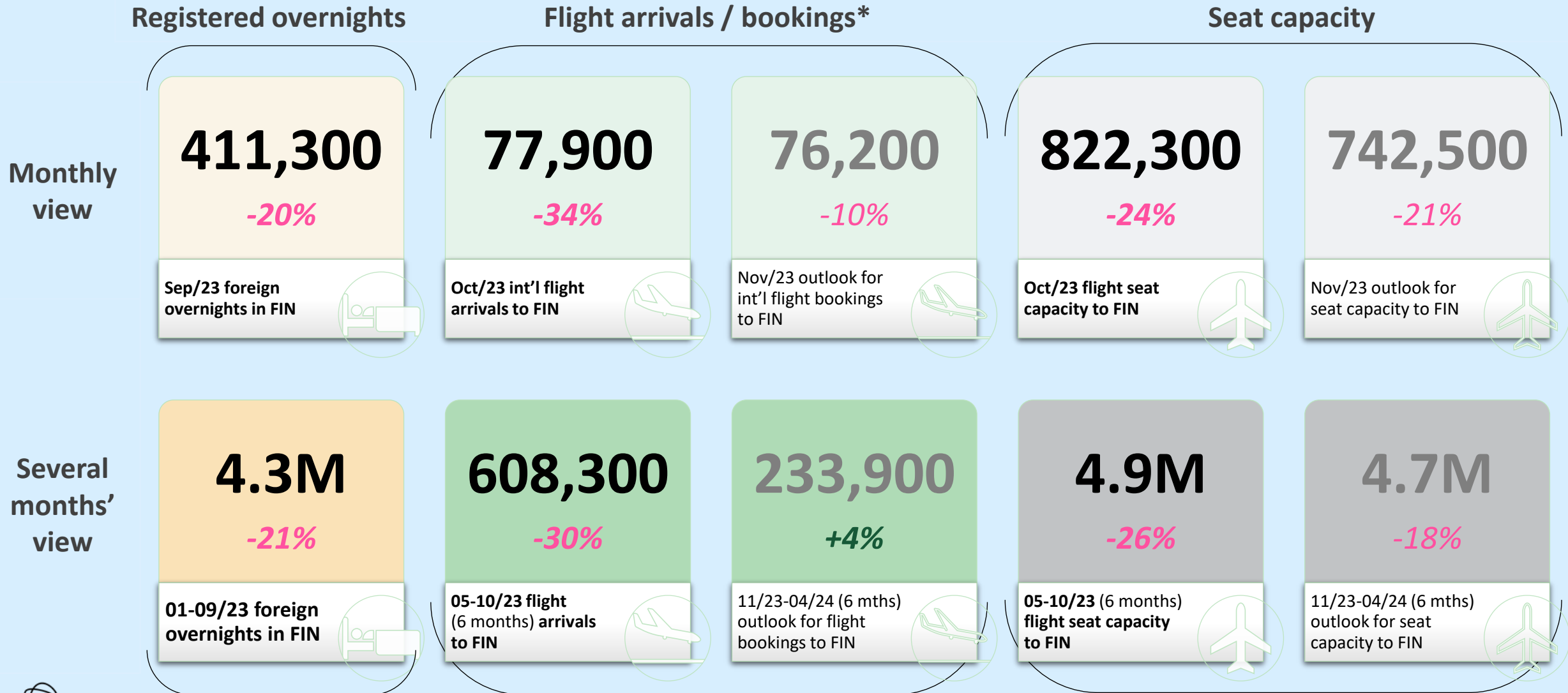
Foreign visitors in Finland

Total	2023M03	2023M04	2023M05	2023M06	2023M07	2023M08	2023M09
Trips of foreign visitors to Finland, number	317,000	275,000	370,000	464,000	488,000	644,000	433,000
Overnight stays of foreign visitors in FIN	2.4M	2.8M	4.0M	4.3M	6.4M	8.2M	3.4M
Median duration of foreign visitors' trips to Finland, nights	4	4	3	4	5	5	3
Spending by foreign visitors in Finland	272M€	159M€	241M€	360M€	416M€	502M€	321M€
Spending by foreign visitors in Finland per trip	858€	578€	653€	776€	852€	780€	740€
Spending by foreign visitors in Finland per day	101€	52€	55€	76€	61€	57€	83€
Carbon footprint of foreign visitors' trips to Finland, thousand kg CO2	156,900	117,600	156,400	197,800	230,800	308,400	198,200
Carbon footprint of foreign visitors' trips to Finland per trip, kg CO2	496	428	423	426	473	479	457
Carbon footprint of foreign visitors' trips to Finland per day, kg CO2	59	38	36	42	34	35	51
Share of package tours in foreign visitors' trips to Finland, %	11	5	5	4	4	5	5
How many months in advance foreign visitors' trip to Finland was booked, month	2.1	1.8	1.7	1.8	2.3	2.7	2.0
How likely is the foreign visitor to return to Finland on holiday in the summer season, on a scale of 1 to 5	3.5	3.7	4.0	3.8	4.2	4.0	3.8
How likely is the foreign visitor to return to Finland on holiday in the winter season, on a scale of 1 to 5	3.3	3.3	3.3	3.0	3.1	3.2	3.2

Foreign registered overnights & flight statistics

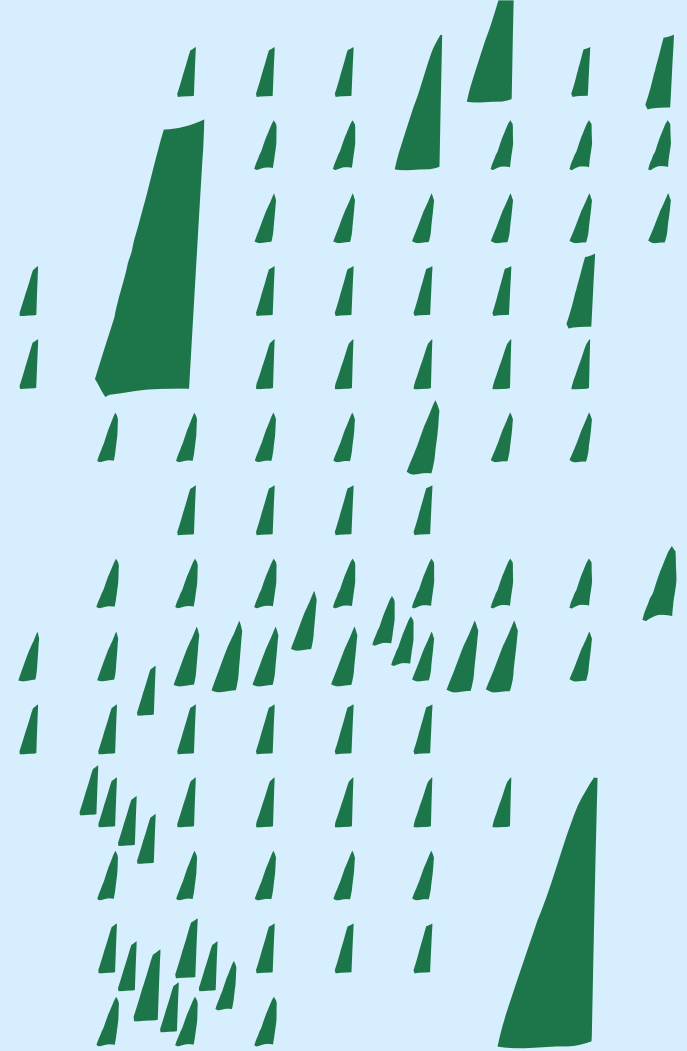
Compared to corresponding period in 2019

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



Registered overnights

January – September 2023



Registered overnights Jan-Sep 2023

	Jan-Sep 2023	Change-% vs. Jan-Sep 2019
Total	17.9M	-1%
Domestic	13.7M	+8%
Foreign, total	4.3M	-21%
Foreign excl. Russia	4.2M	-11%
Russia	34,700	-95%
Scandinavia	657,100	-9%
EU-27 + UK	2.8M	-2%
America	391,500	+12%
Asia	444,100	-50%

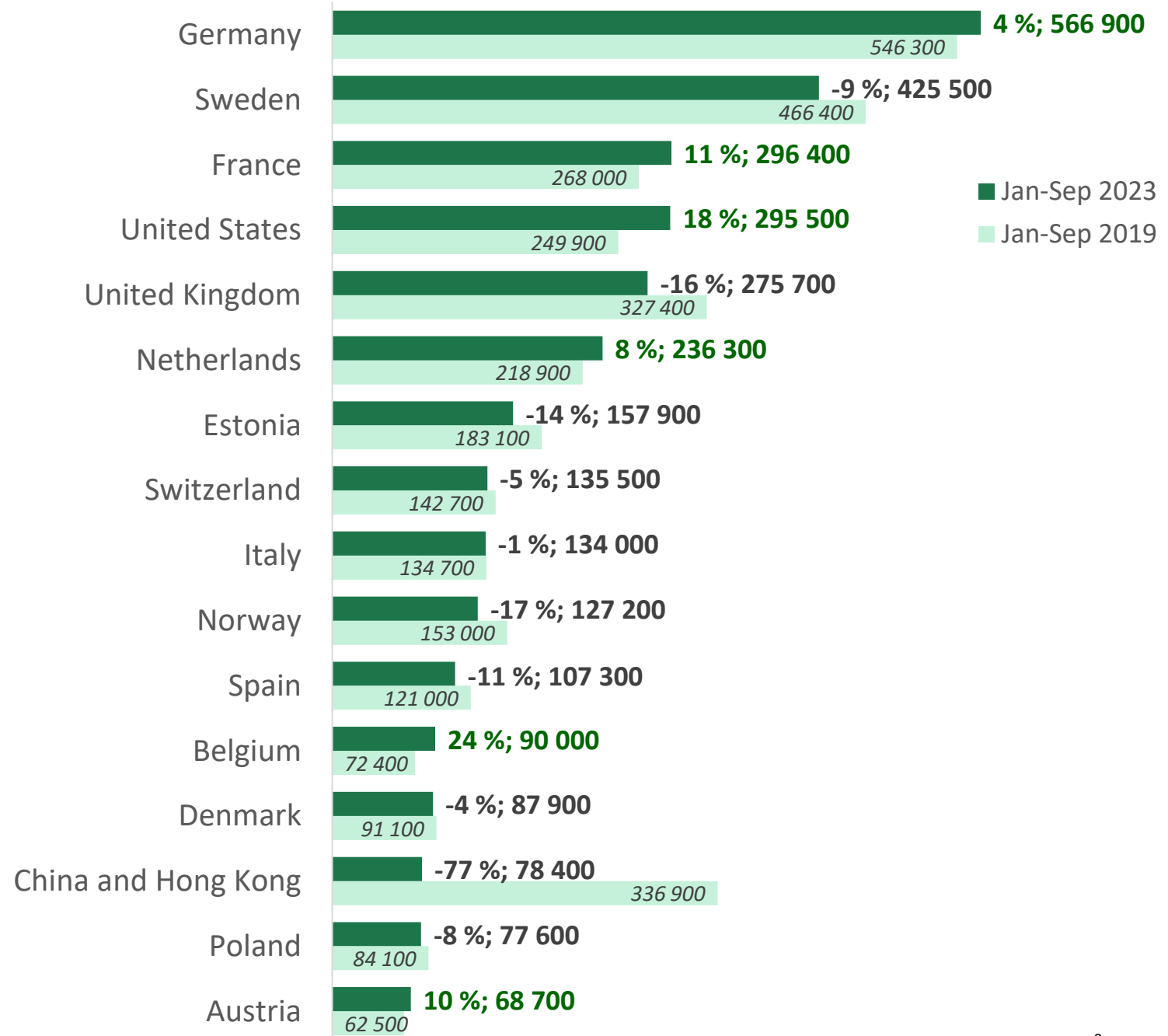


Top16 origin countries

Jan-Sep/2023 vs.
Jan-Sep/2019

During January – September 2023,
overnights developed positively compared
to 2019 from

- Germany and Austria
- Benelux countries
- France
- USA





Year

2017

2018

2019

2020

2021

2022

Curr. yr

Year month

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Overnights
17.9M

TOTAL overnights

YoY change %
5

YoY change %

Foreign
4.3M

Overnights

Domestic
13.7M

Overnights

Revenue
1.1bn

TOTAL revenue

YoY change %
11

YoY change %

Foreign
316.4M

Revenue

Domestic
822.2M

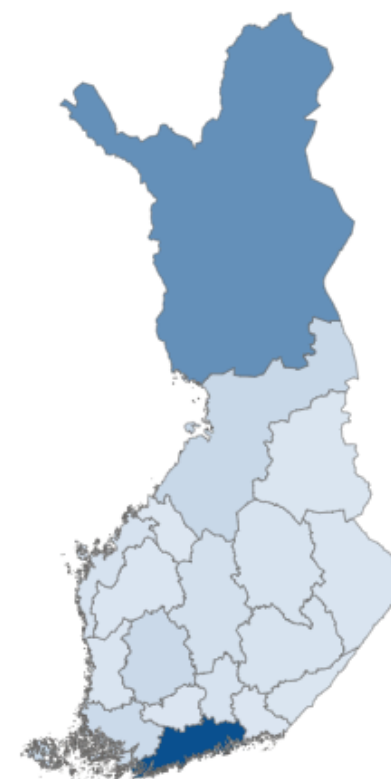
Revenue

View Main regions, Regions by

Domestic

Foreign

REGIONAL OVERNIGHTS

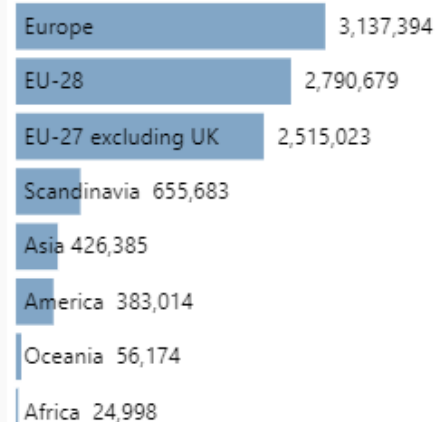


Sources: Statistics Service Rudolf, Statistics Finland

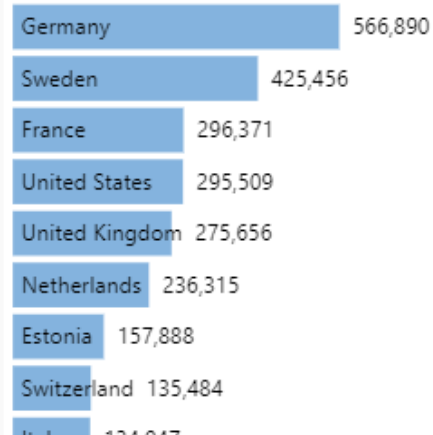
VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

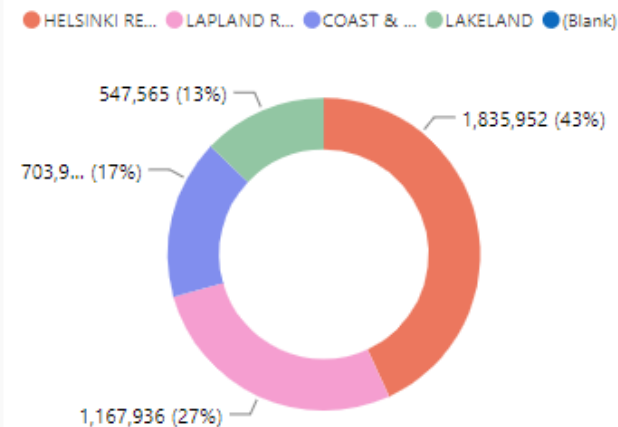
OVERNIGHTS FOREIGN REGION 2023, 202301-202309



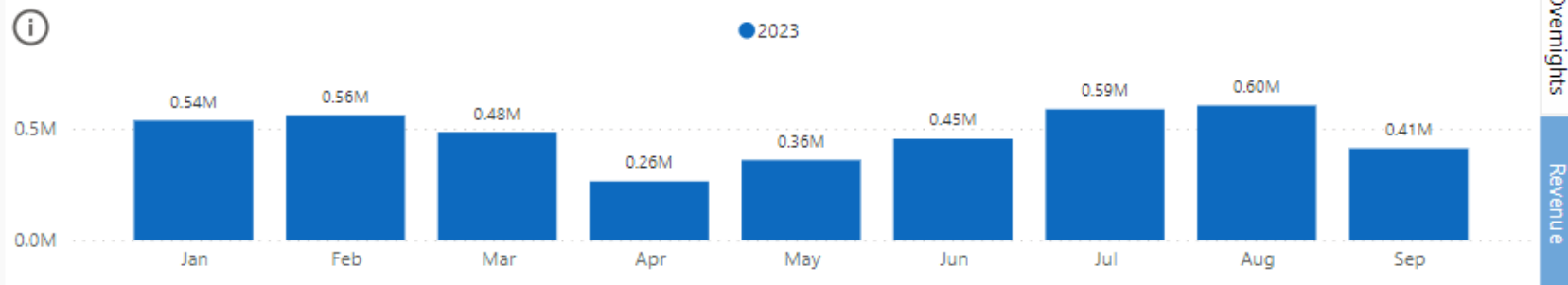
OVERNIGHTS BY COUNTRY YEAR 2023, 202301-202309



OVERNIGHTS IN MAIN REGIONS YEAR 2023, 202301-202309



FOREIGN OVERNIGHTS 2023





Registered overnights

RUDOLF STATISTICS - MONTHLY YoY COMPARISONS

MENU

GO



Main page

Year

2018

2019

2020

2021

2022

Curr. yr

Year month

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Foreign regions

All

Main area

All

Region

All

Sub-region

All

Municipality

All

REVERT TO DEFAULT

REGION VIEW

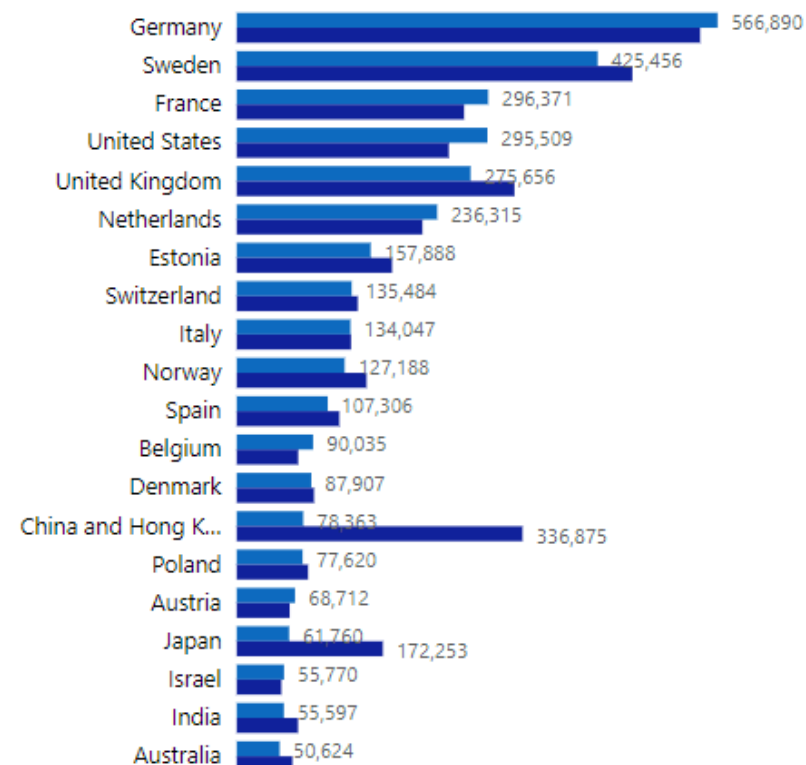
FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2023 compared to 2019 months 1-9

Main area	2023 MAX year	2019 MIN year	Change %
HELSINKI REGION	1,835,952	2,363,729	-22.3
LAPLAND REGION	1,167,936	1,186,593	-1.6
COAST & ARCHIPELAGO	703,909	878,662	-19.9
Åland	191,406	210,341	-9.0
Southwest Finland	158,367	196,432	-19.4
North Ostrobothnia (excl. Kuusamo)	119,160	129,921	-8.3
Uusimaa 2 (excl. Helsinki Metropolitan Area)	71,597	130,461	-45.1
Ostrobothnia	63,382	68,431	-7.4
Satakunta	38,623	41,083	-6.0
South Ostrobothnia	26,864	38,394	-30.0
Kymenlaakso	21,277	43,841	-51.5
Central Ostrobothnia	13,233	19,758	-33.0
LAKELAND	547,565	945,294	-42.1
Pirkanmaa	175,629	171,784	2.2
Central Finland	89,122	109,239	-18.4
Päijät-Häme	62,623	89,064	-29.7
South Savo	55,351	131,409	-57.9
North Savo	51,152	93,249	-45.1
North Karelia	33,013	60,586	-45.5
Kainuu	31,426	80,406	-60.9
South Karelia	29,804	184,375	-83.8
Kanta-Häme	19,445	25,182	-22.8
Total	4,255,362	5,374,278	-20.8

OVERNIGHTS 2023 compared to 2019 months 1-9

● MAX year ● MIN year



Growth
vs. 2019



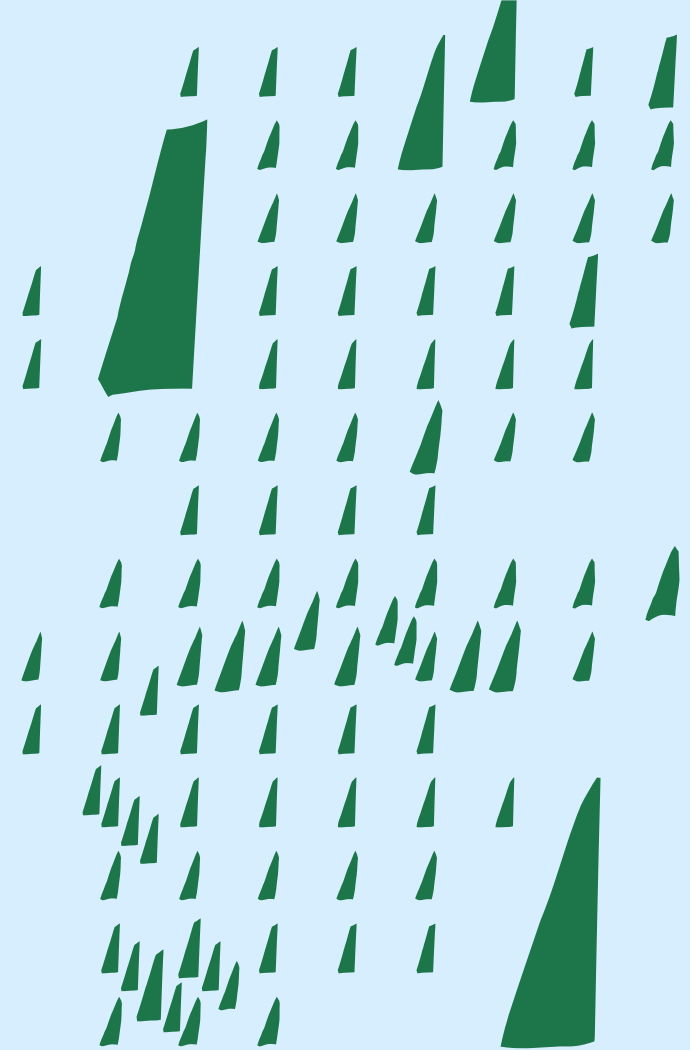
Visit Finland

[Rudolf statistics report](#)

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered overnights in the Nordics

January – September 2023



NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality

Foreign

Year

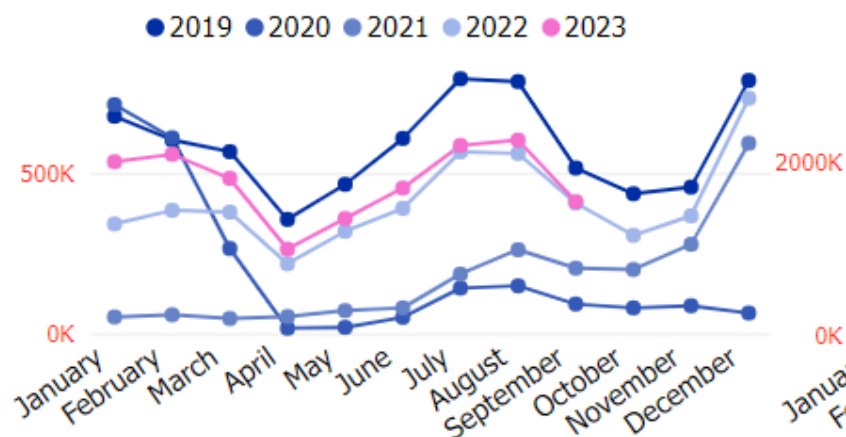
2023

Month

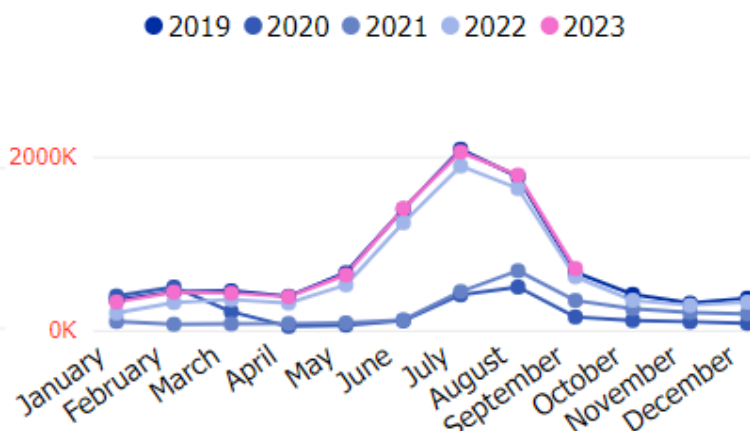
Septemb...

VISIT
FINLAND

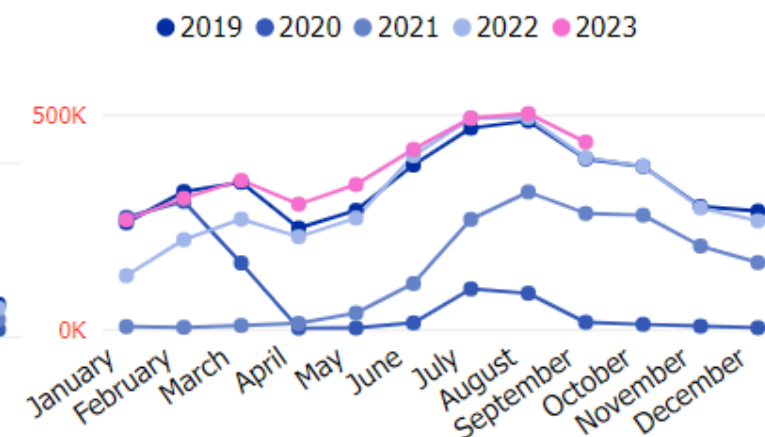
FINLAND



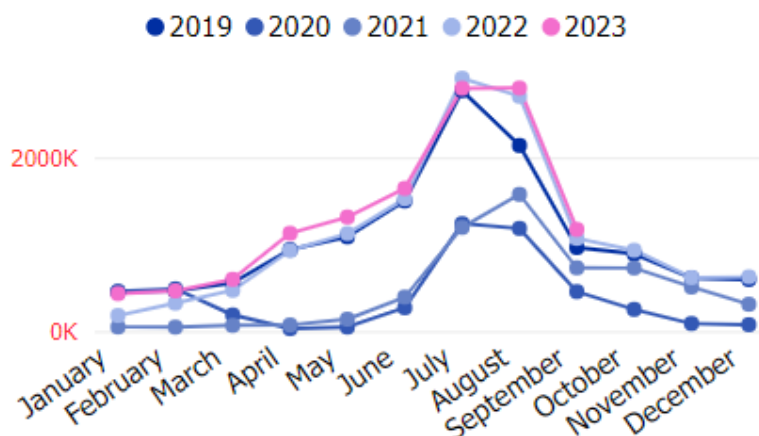
NORWAY



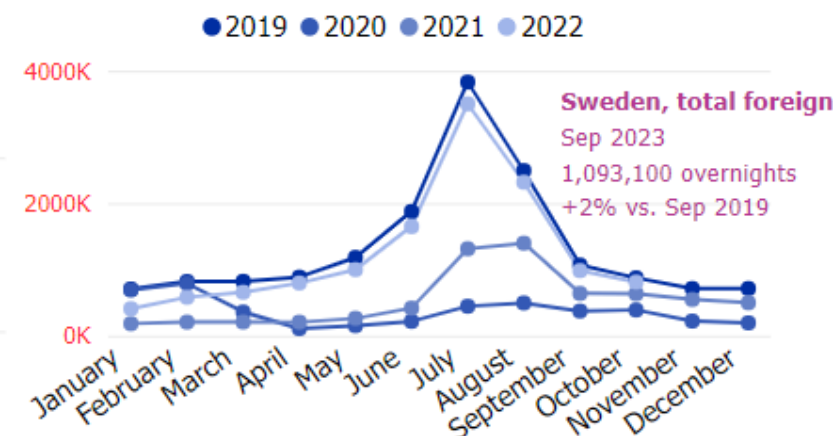
ICELAND



DENMARK



SWEDEN



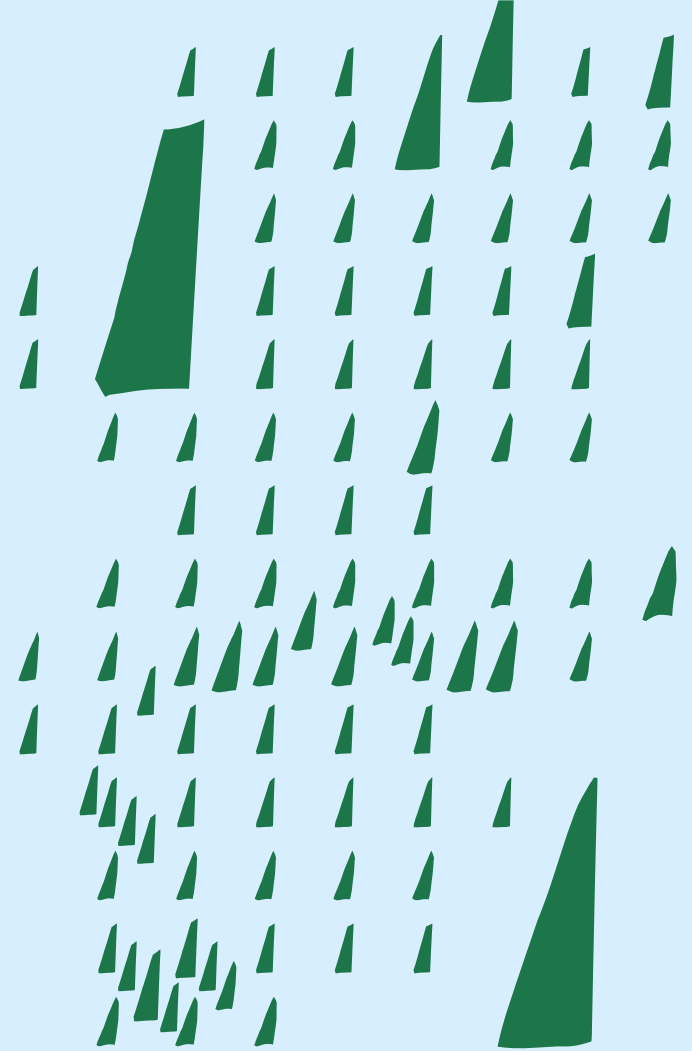
The latest available figures in report format for Sweden are until Oct-2022.

	1-9/2019	1-9/2023	Change 2023 vs. 2019
Sweden	13 706 000	13 297 500	-3 %
Denmark	10 875 200	12 356 800	14 %
Norway	8 199 200	8 158 200	-1 %
Finland	5 374 300	4 255 400	-21 %
Iceland	3 154 700	3 381 300	7 %

Monthly overnight statistics for Iceland include hotels only.

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

Flight arrivals & bookings



Jun-Sep/2023 flight arrivals & bookings for Nov/2023 – Feb/2024

431,300

(-31%)

Arrivals, foreign

Jun-Sep 2023

(change vs. pre-pandemic)

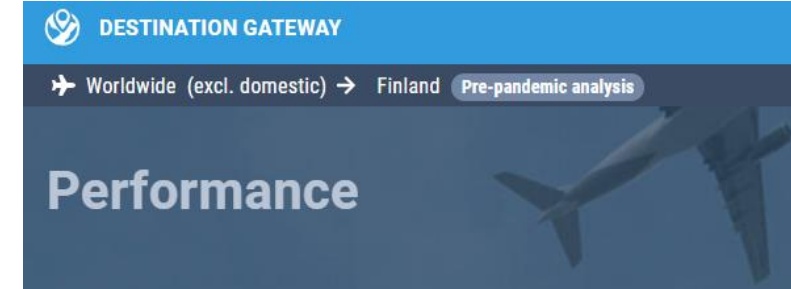
193,000

(+6%)

Bookings, foreign

for Nov/2023 – Feb/2024

(change vs. pre-pandemic)



233,400

(-13%)

Arrivals,

selected markets* & USA

Jun-Sep 2023

(change vs. pre-pandemic)

119,500

(+26%)

Bookings,

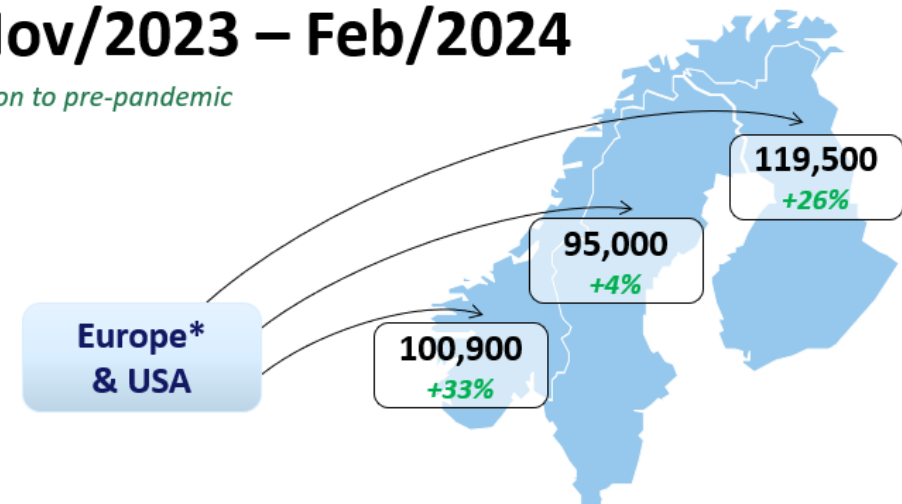
selected markets* & USA

for Nov/2023 – Feb/2024

(change vs. pre-pandemic)

Flight bookings from Europe* & USA for Nov/2023 – Feb/2024

Comparison to pre-pandemic



*) Including:

- Germany
- UK
- France
- Netherlands
- Switzerland
- Spain
- Italy

Follow up on flight bookings* for Nov/2023 – Feb/2024

compared to pre-pandemic

*Bookings for Nov-Feb → 3.9.

→ 1.10.

→ 29.10.

Total int'l
2023 vs. 2019

+23%

+16%

+6%

Germany

+76%

+62%

+48%

UK

-1%

-6%

-12%

France

+70%

+58%

+43%

USA

+50%

+47%

+36%

Netherlands

+54%

+36%

+25%

Spain

+92%

+90%

+67%

Switzerland

+15%

+15%

+9%

Italy

+30%

+18%

+8%

Japan

-38%

-27%

-46%

Hong Kong

-60%

-59%

-60%

India

+39%

+30%

+36%

Others

+2%

-3%

-10%

Flight bookings for winter show **growth** also **both to Norway and Sweden** from:

- Germany
- France
- USA
- Spain
- Switzerland
- Italy

Bookings to **Norway** are growing also from other markets listed here, except from Hong Kong or Japan.

November-February

193,000

No. of bookings*

34,600

17,500

17,000

11,200

11,000

10,900

10,300

7,100

3,800

2,400

2,300

65,000

Please note! Ryanair and EasyJet bookings as well as the charter flights are not included in the booking data yet.

However, this will change in December, when ForwardKeys will be modelling the data to include also all low-cost carriers and the biggest charter airlines in the booking data.

Winter bookings growing strongly to Lapland

Good growth also to Helsinki from many source markets compared to pre-pandemic

	No. of bookings by 29-Oct	change vs. last winter	change vs. winter pre-pandemic	Biggest markets	Growth vs. pre-pandemic (markets with at least 100 bookings to dest.)
RVN	35 400	+37 %	+58 %	DE, FR, ES	DE, FR, ES, IT, CH, NL, US, IN
KTT	15 600	+35 %	+25 %	DE, UK, CH, FR	DE, FR, NL, ES, IT, US
IVL	13 900	+25 %	+14 %	UK, DE	UK, DE, FR, CH, NL, ES, US, IN
KAO	4 000	+42 %	+18 %	DE	DE, NL, CH, IT, ES
Lapland	68 900	+34 %	+37 %		

HEL

120 000 bookings

+39% vs. last winter

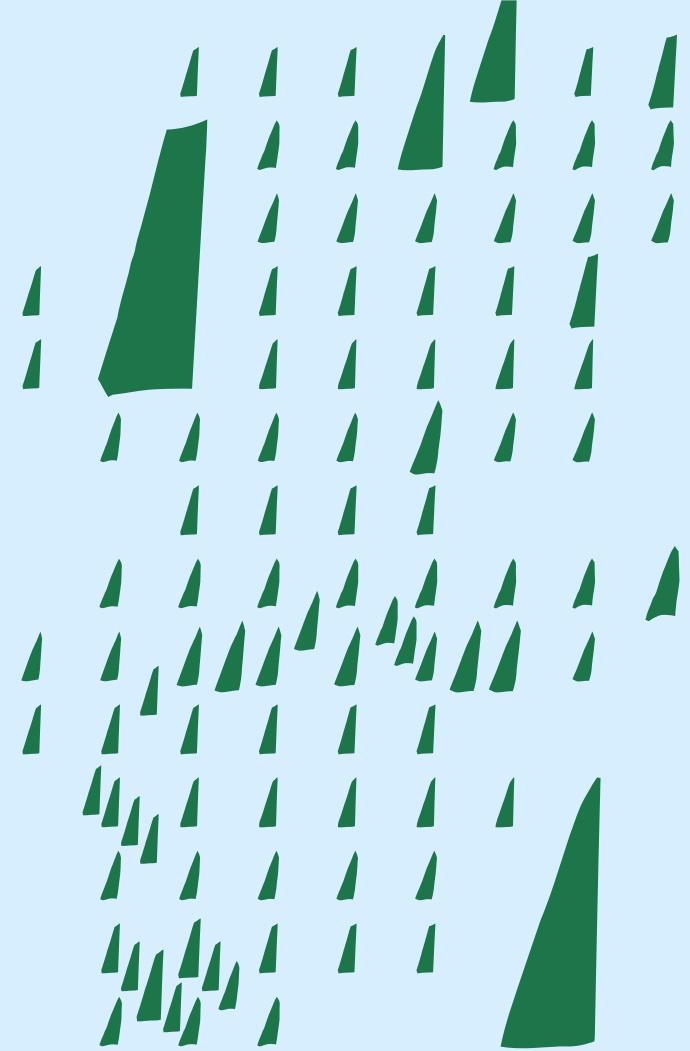
-3% vs. winter months in 2019

Biggest markets: DE, US, UK

Growth vs. pre-pandemic:

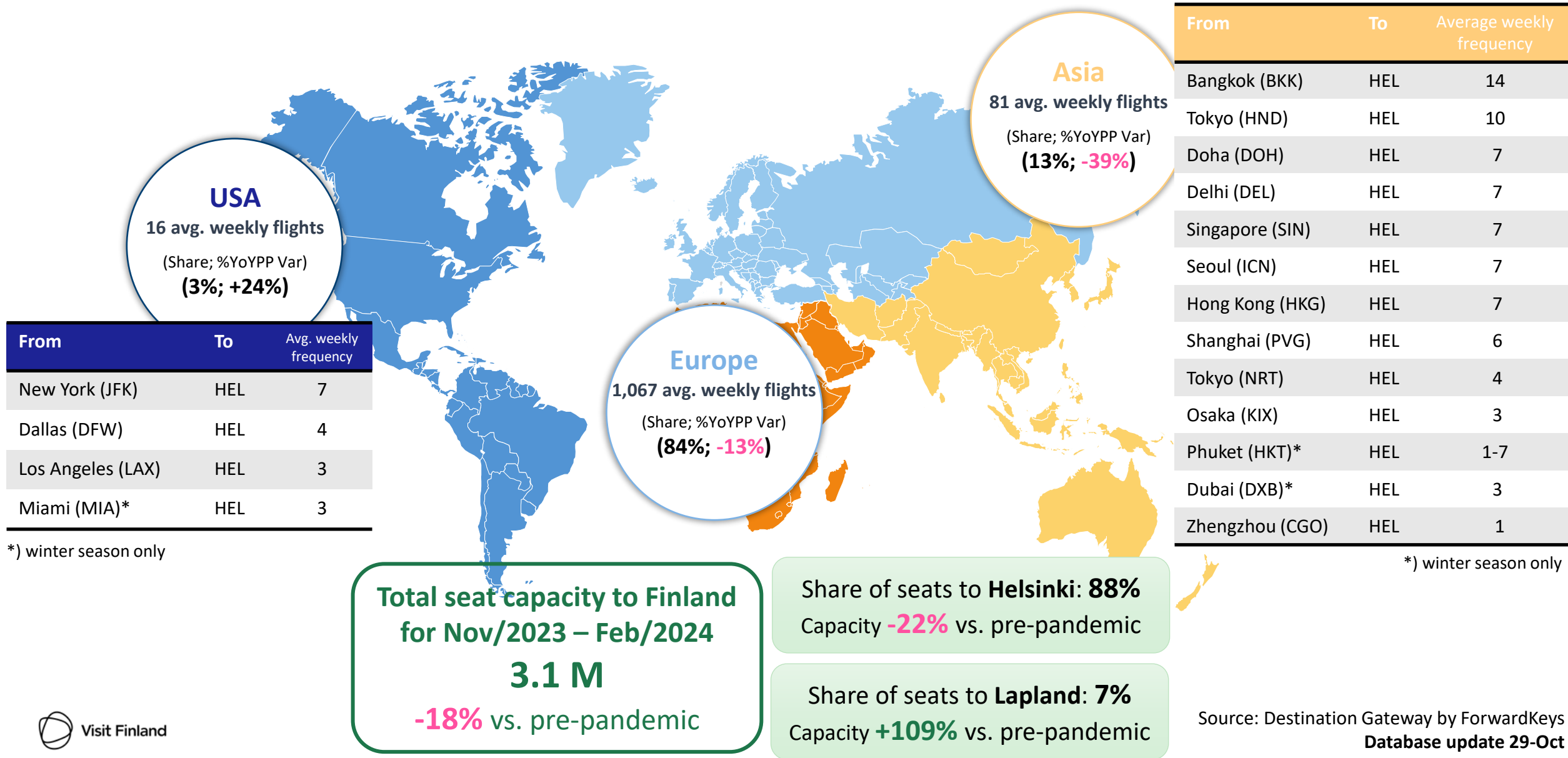
DE, US, FR, NL, ES, CH, IT, IN

Seat capacity on int'l flights



Direct int'l flights to Finland November 2023 – February 2024

and change in seat capacity compared to pre-pandemic



EUROPE to Finland

Nov 2023 – Feb 2024

*) capacity increases from Dusseldorf

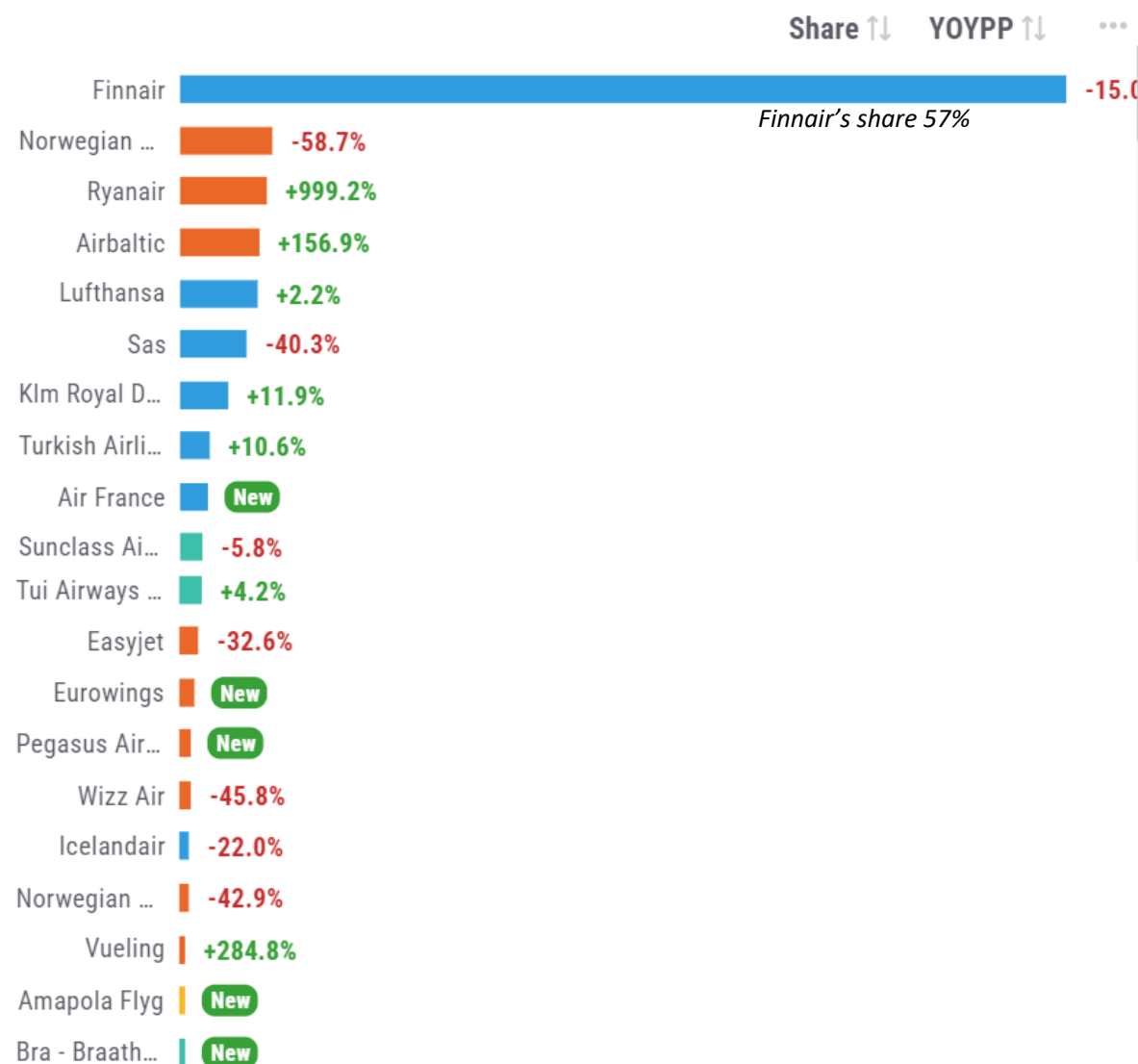
**) capacity increases from Madrid

***) capacity increases from London Stansted, Edinburgh, Liverpool, Bristol, Birmingham

From (selected countries)	Share	Seat capacity compared to pre-pandemic
Germany*	14%	-11%
Sweden	12%	-32%
Spain**	11%	-13%
UK***	11%	-14%
Netherlands	6%	+16%
Denmark	5%	-26%
France	5%	+7%
Italy	5%	+45%
Latvia	5%	+60%
Norway	4%	-14%
Estonia	3%	+40%
Poland	3%	-9%
Turkiye	3%	+38%
Switzerland	3%	-4%
Belgium	2%	+2%
Austria	2%	+23%

Top20 airlines operating from Europe to Finland

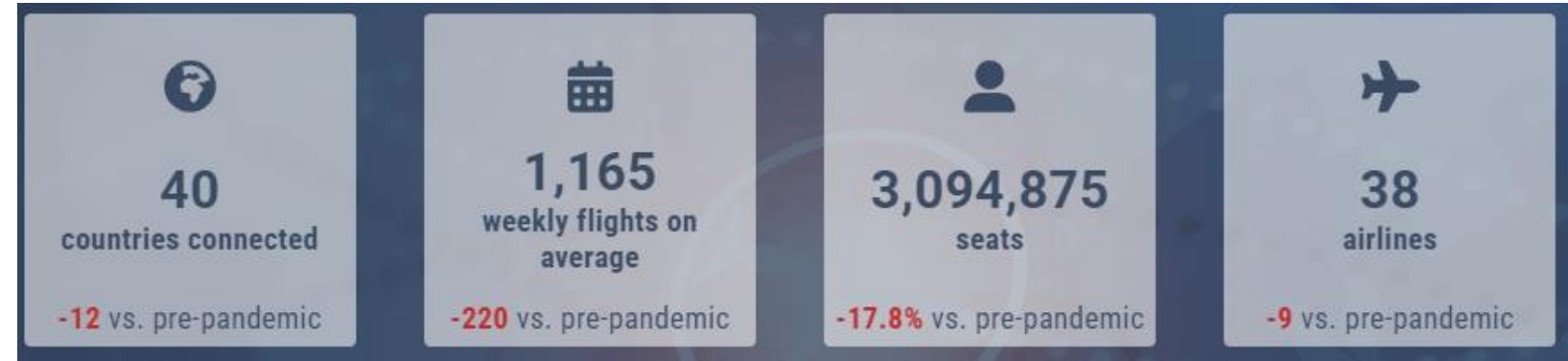
-13.4% YOYPP for selected airlines



Direct flights to Finland November 2023 – February 2024

and change compared to pre-pandemic

Region	Weekly flights on average	Comparison to pre-pandemic	Seats available 2023	Seats available 2019	Comparison to pre-pandemic	Share of total seat capacity to Finland 2022	Share of total seat capacity to Finland 2019
USA	16	+3	77,600	62,700	+24%	3%	2%
Asia	81	-56	401,800	657,300	-39%	13%	17%
Europe	1,067	-161	2,610,300	3,014,300	-13%	84%	80%
Total	1,165	-220	3,094,900	3,766,900	-18%		



Flight connectivity to Lapland Nov/23-Mar/24

Compared to last winter and pre-pandemic

Destination	Weekly flights on average (vs. last winter)	Countries connected (vs. last winter)	Scheduled flights from	TUI flights from (origin countries with more than 1 flight)	Seat capacity vs. last winter	Seat capacity vs. pre-pandemic
Rovaniemi	42 (+17)	13 (+3)	UK, Italy, Ireland, France, Belgium, Germany, Spain (new), Netherlands, Turkiye, Austria (new), Norway (new), Israel, Luxemburg	UK and Spain (new)	+68%	+382%
Kittilä (Levi)	16 (+3)	9 (+1)	UK, Germany, Switzerland, France, Latvia, Austria (new)	UK, Netherlands, Belgium, Germany (new), Ireland	+21%	+9%
Ivalo (Saariselkä)	4 (+2)	4 (+2)	Germany, France (new), Switzerland (new)	UK	+99%	-16%
Kuusamo (Ruka)	4 (+2)	3 (+1)	Germany, Switzerland (new)	UK, Germany (new)	+54%	+48%

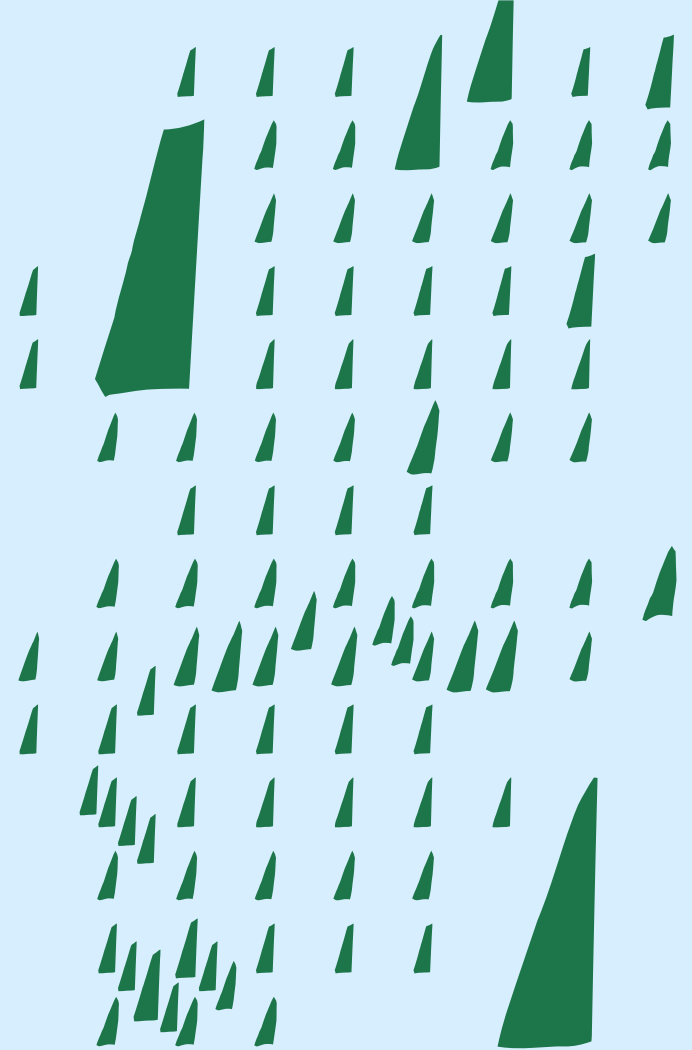
Domestic flights to Lapland Nov/23-Mar/24

Compared to last winter and pre-pandemic

Destination	From	Weekly flights on average (vs. last winter)	Operating carriers	Seat capacity vs. last winter	Seat capacity vs. pre- pandemic
Rovaniemi	Helsinki	52 (+3)	Finnair (46 avg. weekly flights) Norwegian (6)	+8% (+11% / -21%)	-13% (+5% / -68%)
Kittilä (Levi)	Helsinki & Tampere	30 (+2)	Finnair (27 avg. weekly flights) Air Baltic , <i>new from TMP</i> (2) Norwegian (no regular flights)	+10% (+7% / - / -56%)	-8% (+6% / - / -97%)
Ivalo (Saariselkä)	Helsinki	26 (+1)	Finnair (26 avg. weekly flights)	+9%	-9% (AY +4%, Norwegian discontinued)
Kuusamo (Ruka)	Helsinki	20 (+1)	Finnair (20 avg. weekly flights)	-14%	-24%

Oxford Economics forecast on travel recovery

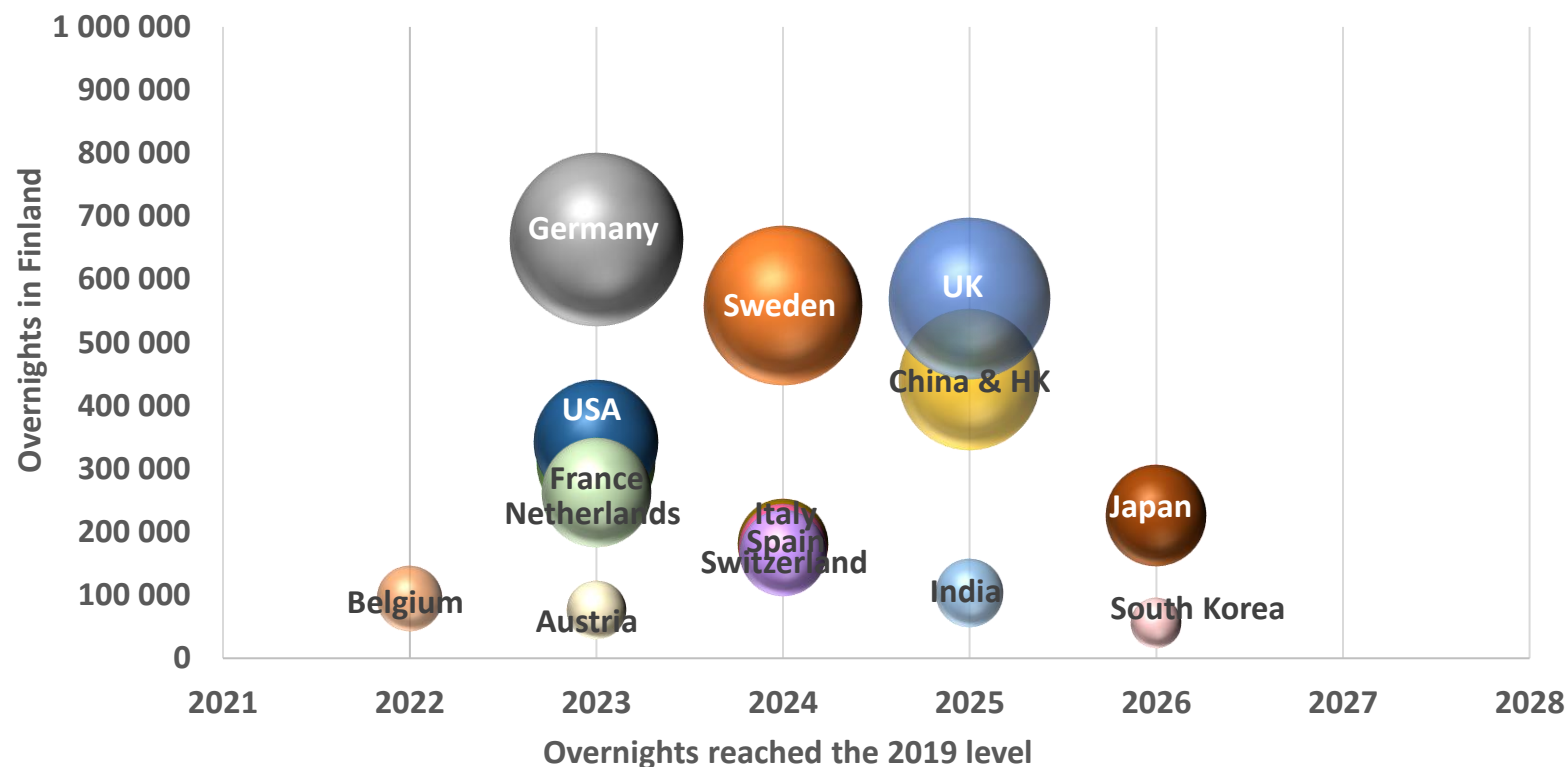
Databank update in October 2023



Overnights – Recovery to 2019 levels

Databank update October/2023

Recovery timeline - Overnights in Finland reached the level of 2019

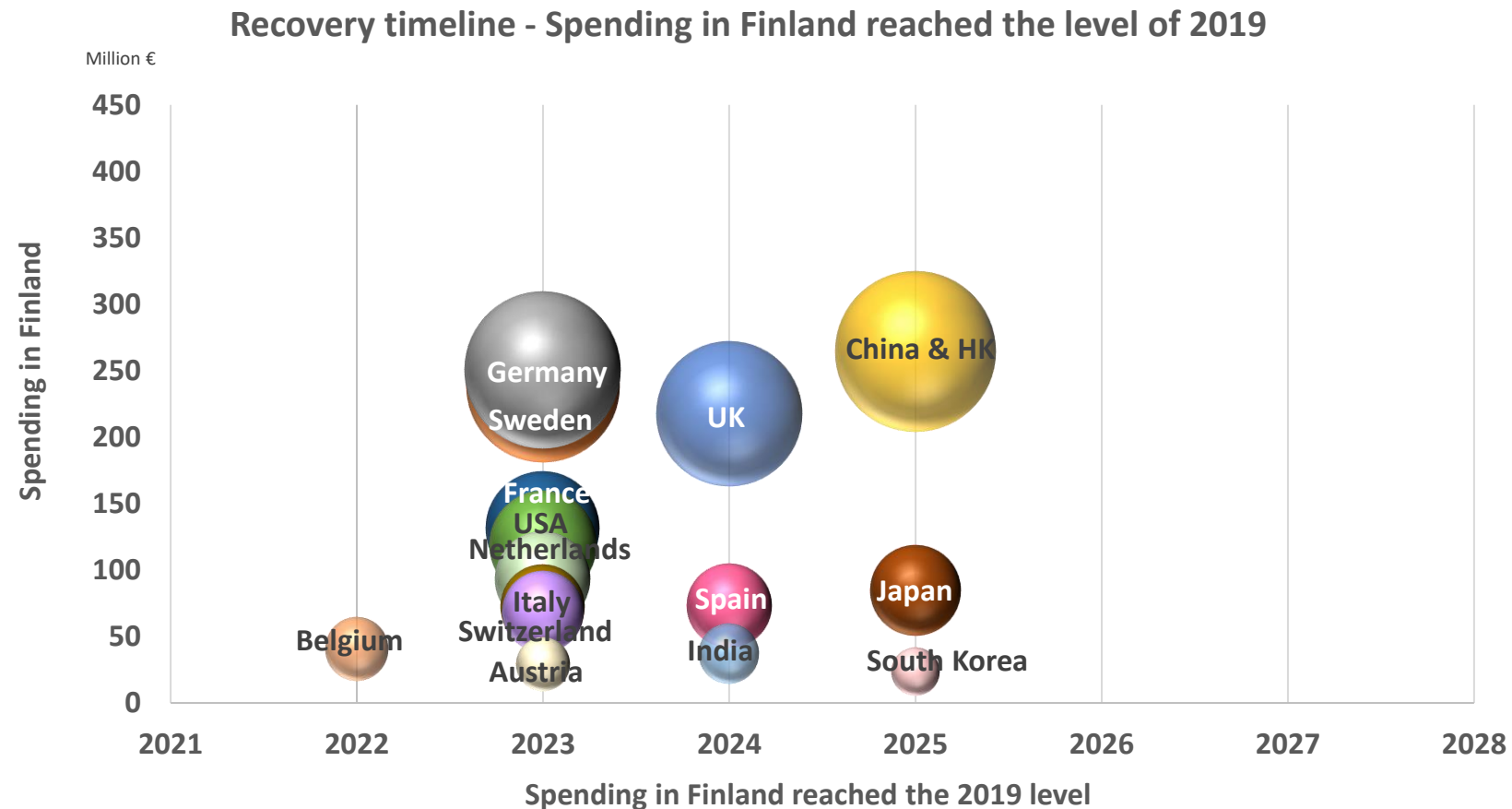


Source: Oxford Economics, databank update Oct 20, 2023

	No. of overnights in 2023	comp.to 2019
Germany	682 400	3 %
Sweden	521 100	-7 %
UK	484 800	-15 %
France	375 700	10 %
USA	367 300	19 %
Netherlands	289 000	10 %
Italy	176 600	-2 %
Switzerland	153 700	-7 %
Spain	151 000	-13 %
Belgium	118 200	26 %
China & HK	98 700	-80 %
Austria	84 800	11 %
Japan	77 300	-66 %
India	74 300	-27 %
Russia	43 900	-95 %
South Korea	37 200	-33 %

Spending – Recovery to 2019 levels

Databank update October/2023



Source: Oxford Economics, databank update Oct 20, 2023

	Spending (Million EUR) in 2023	comp.to 2019
Germany	293	17 %
Sweden	256	8 %
UK	204	-6 %
USA	164	38 %
France	163	24 %
Netherlands	116	25 %
Italy	82	14 %
China & HK	76	-71 %
Switzerland	74	8 %
Spain	70	-4 %
Belgium	59	44 %
Austria	38	30 %
India	31	-16 %
Japan	30	-64 %
Russia	22	-94 %
South Korea	17	-27 %

