Visit Finland

VF monthly follow-up

October 2025

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

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

	Trips to Finland	Spending in Finland	Carbon efficiency	Registered overnights
Monthly view	**326,000** *-7%* Oct/25 trips to FIN	**188M€** *-20%* Oct/25 total spend in FIN	**1.1** - Oct/25 €/CO2	**387,200** *+8% (-11%)* Oct/25 foreign reg. overnights in FIN
Year to date	**4.2M** *+3%* Jan-Oct 2025 trips to FIN	**2.9Mrd€** *-4%* Jan-Oct 2025 total spend in FIN	**1.1** *-0.1* Jan-Oct 2025 €/CO2	**5.7M** *+13% (-3%)* Jan-Oct 2025 foreign reg. overnights in FIN

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Sources: Matkailijamittari/Border Survey, Accommodation Statistics, Visit Finland Statistics Service Rudolf, Statistics Finland

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	**98,100** ***+6%** (+3%)* **Nov/25 int’l flight arrivals to FIN**	**175,200** ***+4%** (+19%)* Dec/25 outlook for int’l flight arrivals to FIN	**818,100** ***+3%** (-13%)* **Nov/25 flight seat capacity to FIN**	**952,100** ***+9%** (-5%)* Dec/25 outlook for seat capacity to FIN
6 months’ historical & forecast view	**547,300** ***+2%** (-22%)* **06-11/25** (6 mths) **arrivals to FIN**	**675,800** ***0%** (+10%)* 12/25-05/26 (6 mths) outlook for flight arrivals to FIN	**5.5M** ***+2%** (-16%)* **06-11/25** (6 mths) **flight seat capacity to FIN**	**5.5M** ***+6%** (-7%)* 12/25-05/26 (6 mths) outlook for seat capacity to FIN

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

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Source: ForwardKeys Destination Gateway

Border Survey

Latest 12 months (Nov/2024 – Oct/2025)

Foreign visitors made **5 million trips to Finland**, marking a **5% rise** compared to the period from Nov/2023 to Oct/2024. **Total expenditure in Finland** was **3.6 billion** euros, **declining slightly** compared to the previous 12 months.

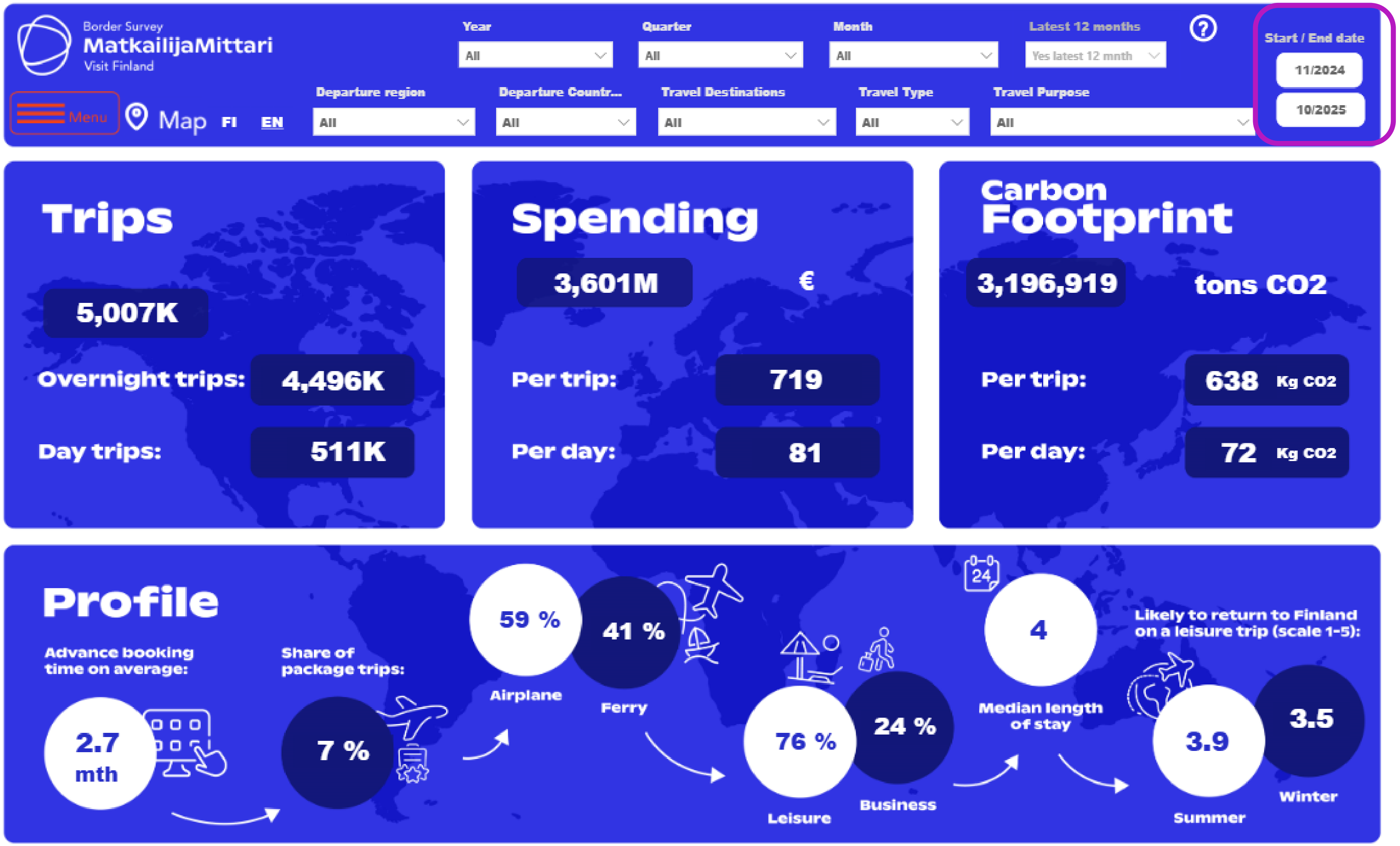
- **Leisure travel** accounted for **76%** of all trips, with a **9% increase in trip numbers** and a **4% growth in spending** by leisure travellers.
- **Work-related trips** represented **24%** of all trips but **declined by 6%**, with **business traveller spending falling by 16%**.

More than half of all visitors were on **holiday trips**, while **19%** came to **visit friends or relatives**. **Holiday travel grew clearly** compared to the prior period, whereas **visits to friends and relatives dropped**. Overall, business travel decreased except for **conference, congress, or trade fair attendees, whose trips rose by 16%**.

Daily spending by **holiday travellers** increased by 8%, averaging **133 euros** per day. Among business travellers, those **attending conferences, congresses, or trade fairs** had the highest daily spend at **132 euros**, though this was 14% lower than in the previous 12-month period.

Border Survey / latest 12 months (Nov/2024 – Oct/2025)

- **5.0 million** visitors (YoY **+5%**)
  - 90% overnight trips
- Spending **3.6 billion€** (YoY -1%)
  - 719 € / trip (YoY -6%)
  - 81 € / day (YoY **+8%**)
- **76%** travelling for **leisure** (leisure trips **+9%** & spending **+4%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.1** months)
- Median length of stay **4 nights** (YoY no change)

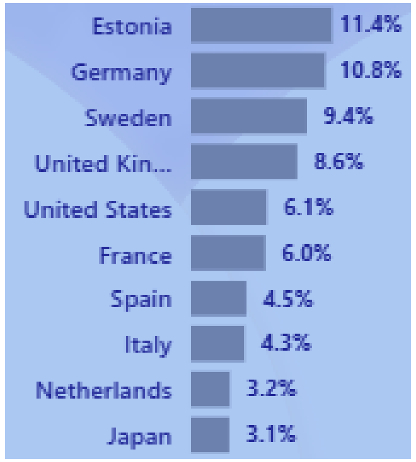


Border Survey / Latest 12 months (Nov 2024 – Oct 2025)

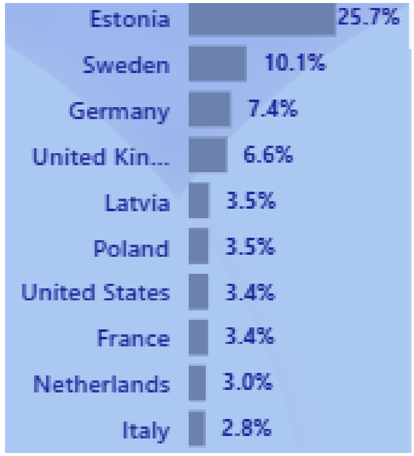
Foreign visitors in Finland

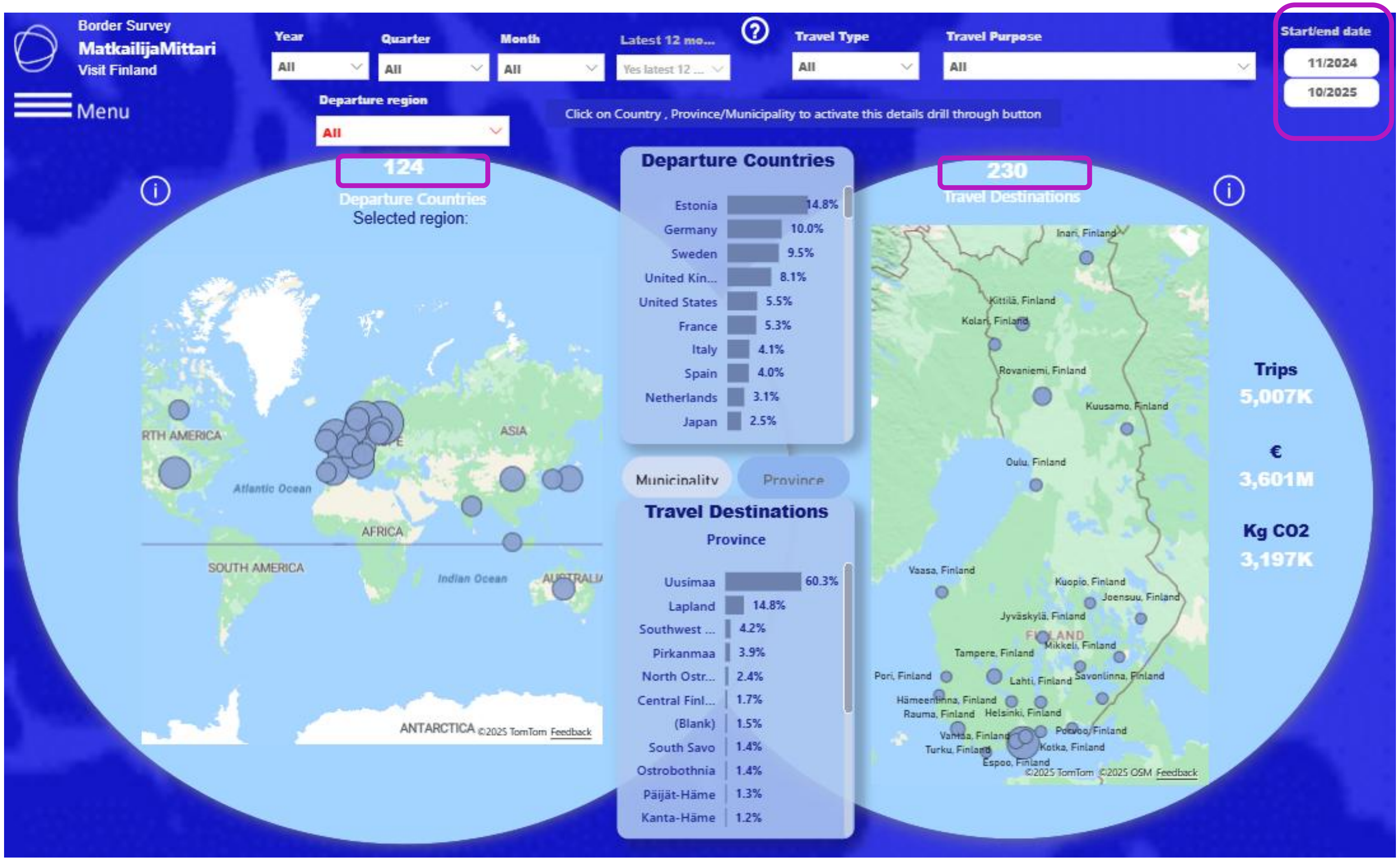
[Link to the report: Matkailijamittari - Visit Finland]

Top10 source markets for **leisure/personal trips**



Top10 source markets for **work related trips**





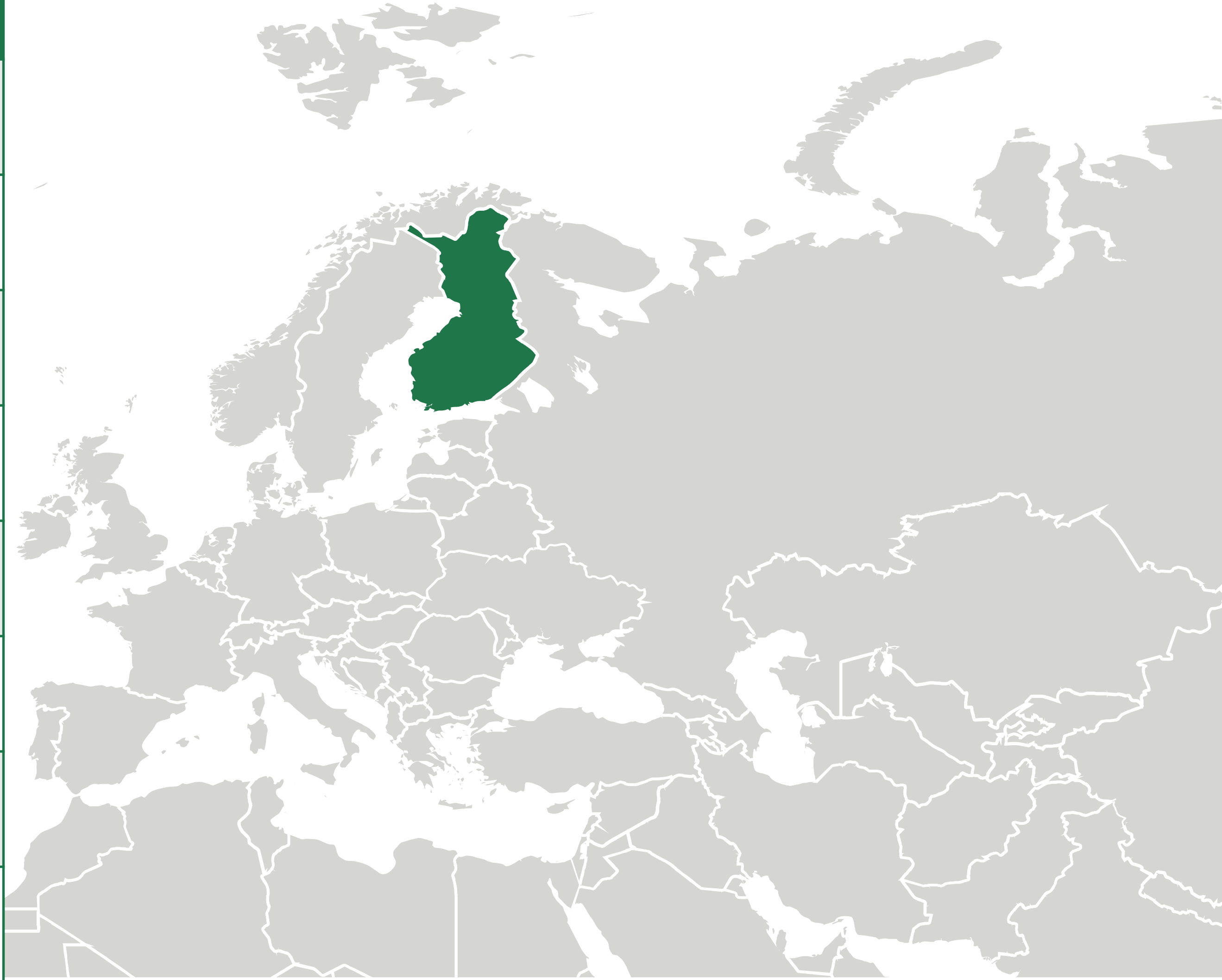
Registered Overnights

- **<u>Jan-Oct 2025</u>**
  - The number of registered foreign overnights reached nearly **5.7 million**, marking an **13%** increase from the previous year.
  - The leading source markets were **Germany**, **Sweden**, **USA**, **UK**, **France**, and **the Netherlands**.
  - Overall accommodation revenue increased by **5%**, with **foreign revenue rising** by **17%** and domestic revenue decreasing by 1% compared to the same period last year. **Foreign revenue accounted for 35%** of the total accommodation revenue, while **foreign overnights accounted for 29%** of total overnights.

- **<u>September & October 2025</u>**
  - Total foreign overnights reached **478,300** in September (**+18%** YoY, *& -7% compared to Sep 2019*) and **387,200** in October (**+8%** YoY, *& -11% compared to Oct 2019*).
  - Top 3 source markets both in September & October were **Germany**, **Sweden**, and **the US**.
  - In September **nearly half** of the registered foreign overnights took place in **Helsinki**, and in October their share was **44%**.
    - ➢ Biggest source markets for Helsinki were **USA** and **Germany** both in September and October.

Registered overnights January – October 2025

	Jan-Oct 2025	Change-% vs. Jan-Oct **2024**	*Change-% vs. Jan-Oct 2019*
Total	**19.56M**	**+2%**	*-1%*
Domestic	**13.91M**	**-2%**	*0%*
Foreign, total	**5.65M**	**+13%**	*-3%*
Foreign excl. Russia	**5.64M**	**+13%**	*+10%*
Scandinavia	776,300	**+5%**	*-1%*
EU-27 + UK	**3.46M**	**+10%**	*+13%*
Asia	843,000	**+34%**	*-14%*
America	554,600	**+16%**	*+45%*



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Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Main source markets

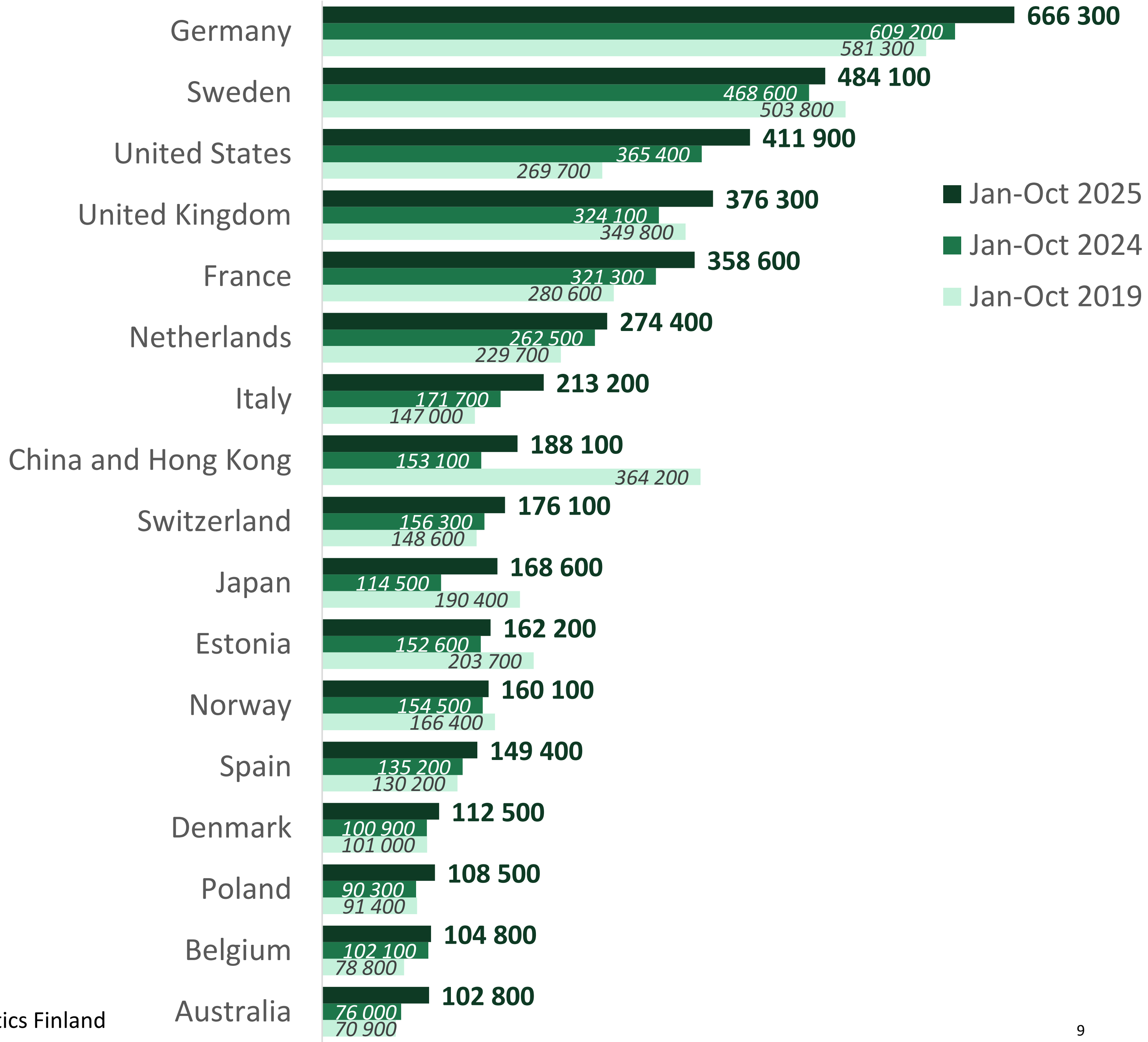
January – October 2025

vs. Jan-Oct 2024 & *Jan-Oct 2019*

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

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

Compared to January-October 2019, overnight stays from Sweden (-4%), China including Hong Kong (-48%), Japan (-11%), Estonia (-20%), and Norway (-4%) still lagged behind pre-pandemic levels.



Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered foreign overnights increased by 18% in September

September 2025

478,300 total foreign overnights;
+18% vs. 09/2024, *(-7% vs. 09/2019)*

477,000 foreign excl. Russia; **+19%**, *(+1%)*

260,500 EU+UK; **+17%**, *(+2%)*

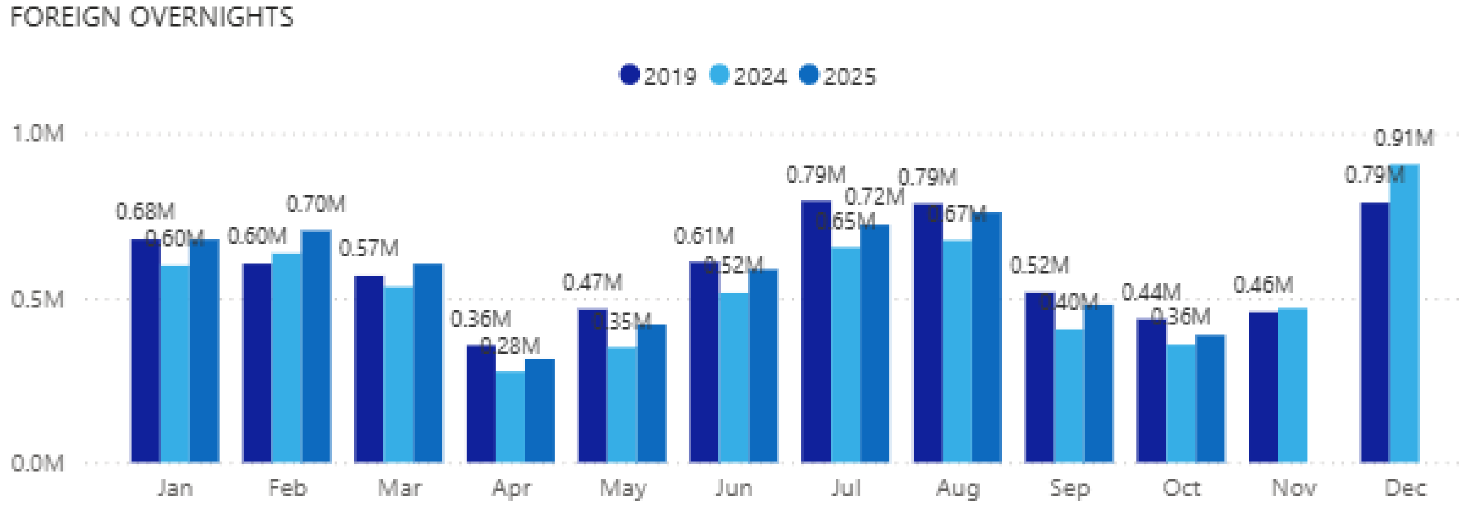
74,900 Scandinavia; **+15%**, *(+7%)*

87,500 Asia; **+38%**, *(-23%)*

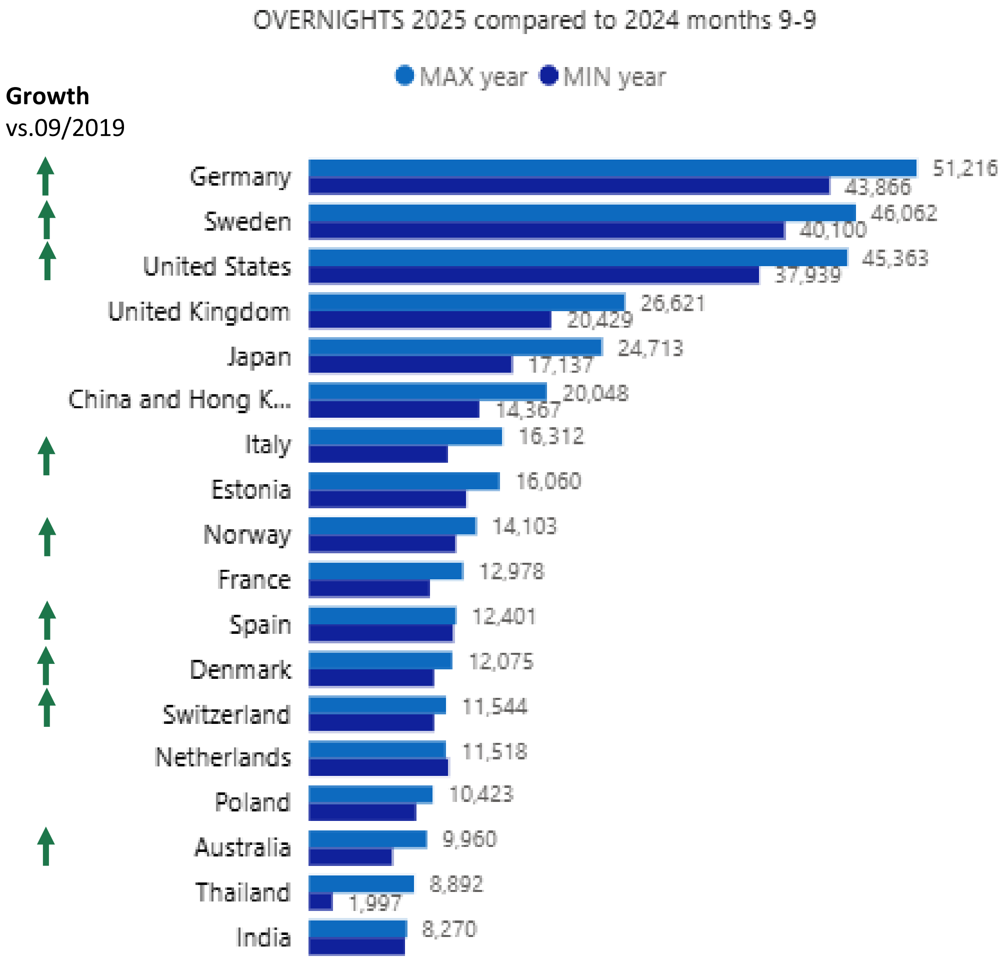
59,200 America; **+18%**, *(+42%)*

Top destinations for total foreign;
vs. 09/2024, *(vs. 09/2019)*

- **234,400 Helsinki**; **+20%**, *(+1%)*
- 40,400 Vantaa; **+29%**, *(-9%)*
- 19,600 Rovaniemi; **+3%**, *(+78%)*
- 18,300 Åland; **+13%**, (+7%)
- 17,700 Tampere; **+19%**, *(+12%)*
- 14,600 Espoo; **-7%**, *(-26%)*
- 12,300 Turku; **+8%**, *(-36%)*
- 10,300 Inari-Saariselkä; **+16%,** *(+27%)*



Top source markets, total foreign; vs. 09/2024



Monthly accommodation statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered foreign overnights increased by 8% in October

October 2025

387,200 total foreign overnights;
+8% vs. 10/2024, *(-11% vs. 10/2019)*

386,300 foreign excl. Russia; **+8%**, *(-1%)*

209,100 EU+UK; **+5%**, *(-7%)*

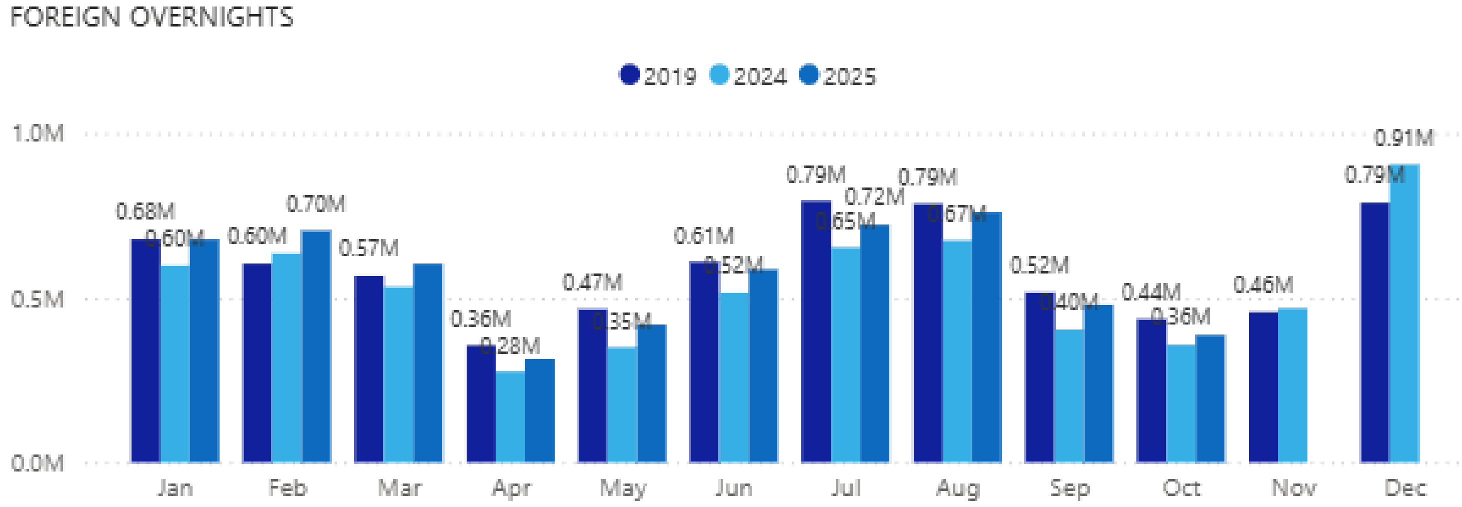
60,200 Scandinavia; **+5%**, *(-4%)*

79,700 Asia; **+31%**, *(-9%)*

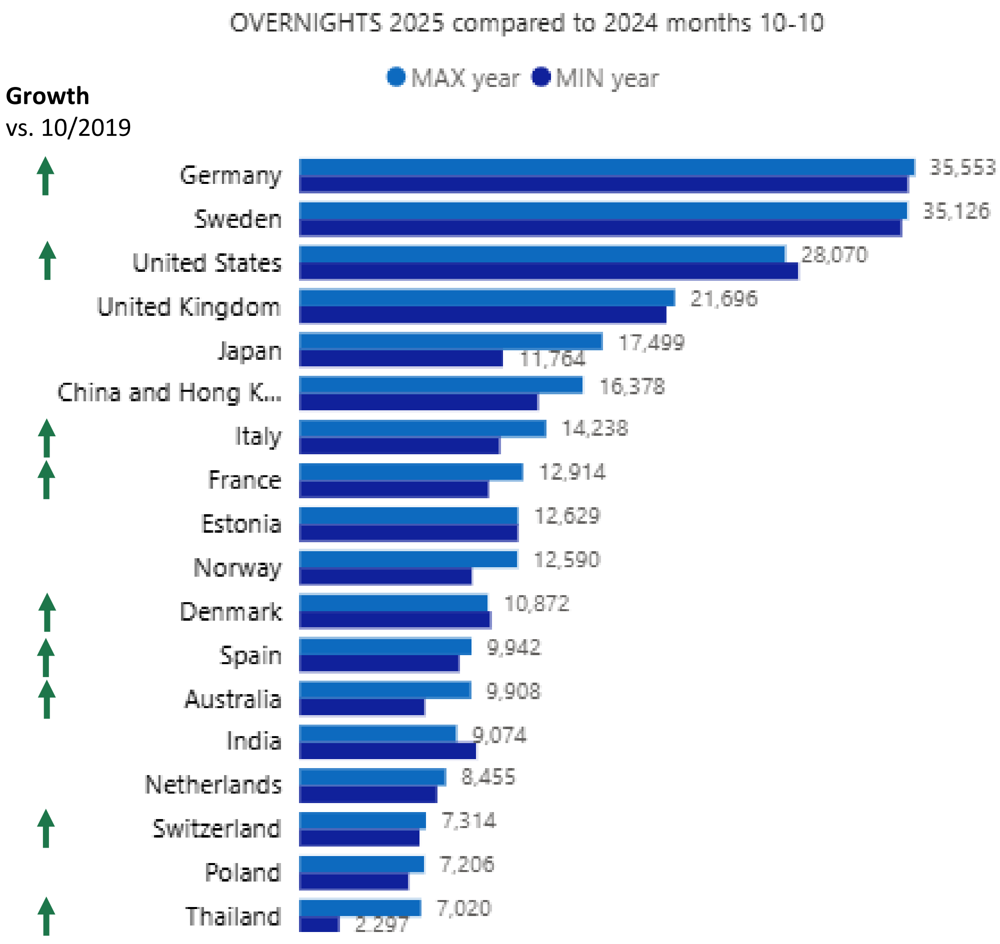
40,200 America; **-1%**, *(+27%)*

Top destinations for total foreign;
vs. 10/2024, *(vs. 10/2019)*

- **170,300 Helsinki**; **+4%**, *(-13%)*
- 39,100 Vantaa; **+25%**, *(+17%)*
- 38,400 Rovaniemi; **+14%**, *(+120%)*
- 18,200 Tampere; **+26%**, *(-12%)*
- 15,400 Espoo; **+22%**, *(-14%)*
- 10,700 Inari-Saariselkä; **+9%**, *(+32%)*



Top source markets, total foreign; vs. 10/2024



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Monthly accommodation statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered overnights in the Nordics

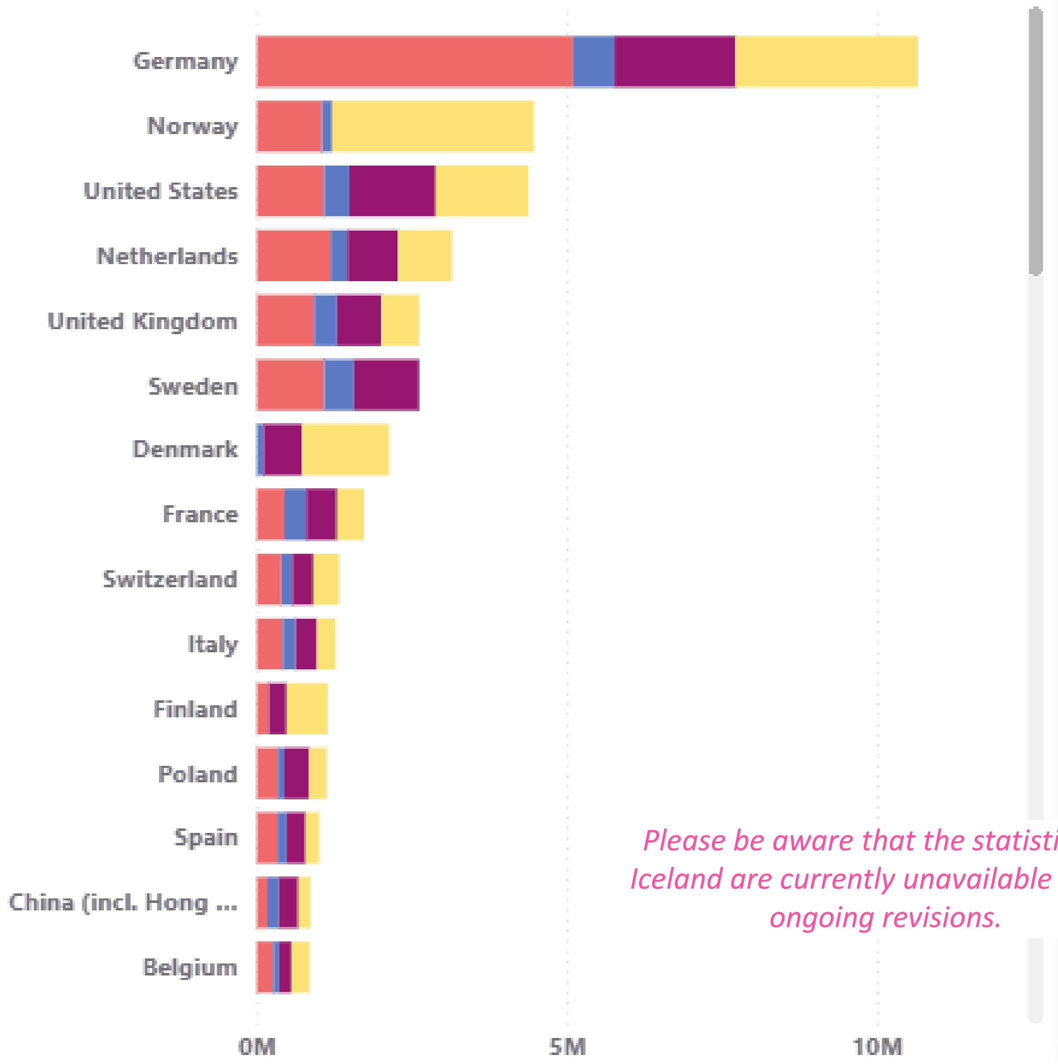
Jan-Oct 2025

- The Nordic region has **experienced good growth** in **registered foreign overnight**
  stays from January to October 2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **12%** (Denmark and Sweden having both a 32% share, and Norway 23%).
  - **Germany** is clearly the biggest source market, and their overnights have increased
    in each of the four Nordic countries compared to previous year.
  - Beside Germany, overnights increased to each Nordic country from **the US**, **the Netherlands**, **Sweden**, **Denmark**, **France**, **Switzerland**, **Finland**, **Spain**, **China**, and **Belgium** among the main source markets.

Foreign overnights in the Nordics (excl. Iceland) Jan-Oct 2025

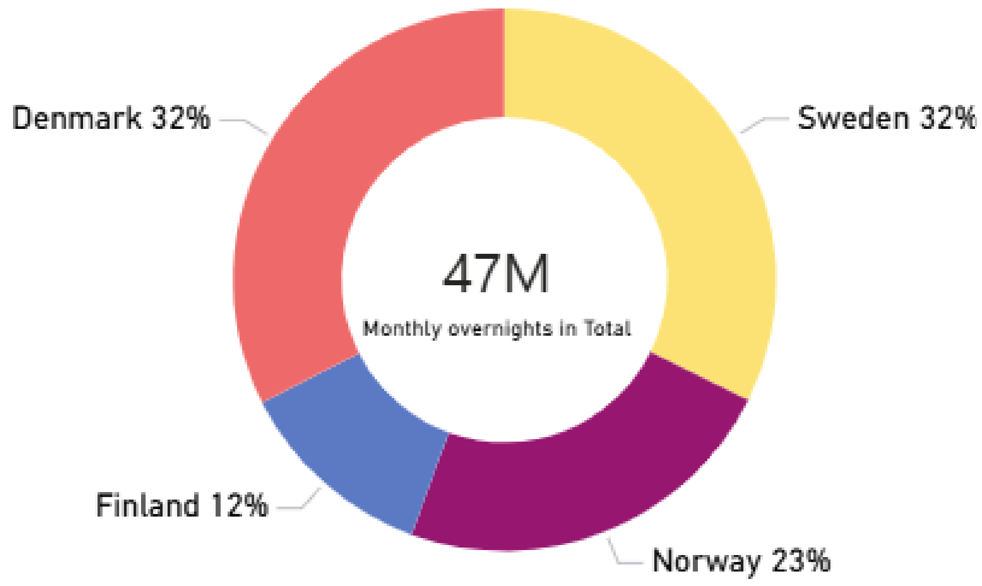
Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2025-31.10.2025



Please be aware that the statistics for Iceland are currently unavailable due to ongoing revisions.

WHOLE COUNTRY Foreign 1.1.2025-31.10.2025



Nordics	Monthly	YoY change %
Denmark	15,338,577	7 %
Sweden	15,255,899	11 %
Norway	10,975,824	17 %
Finland	5,650,955	13 %
Total	**47,221,255**	**11 %**

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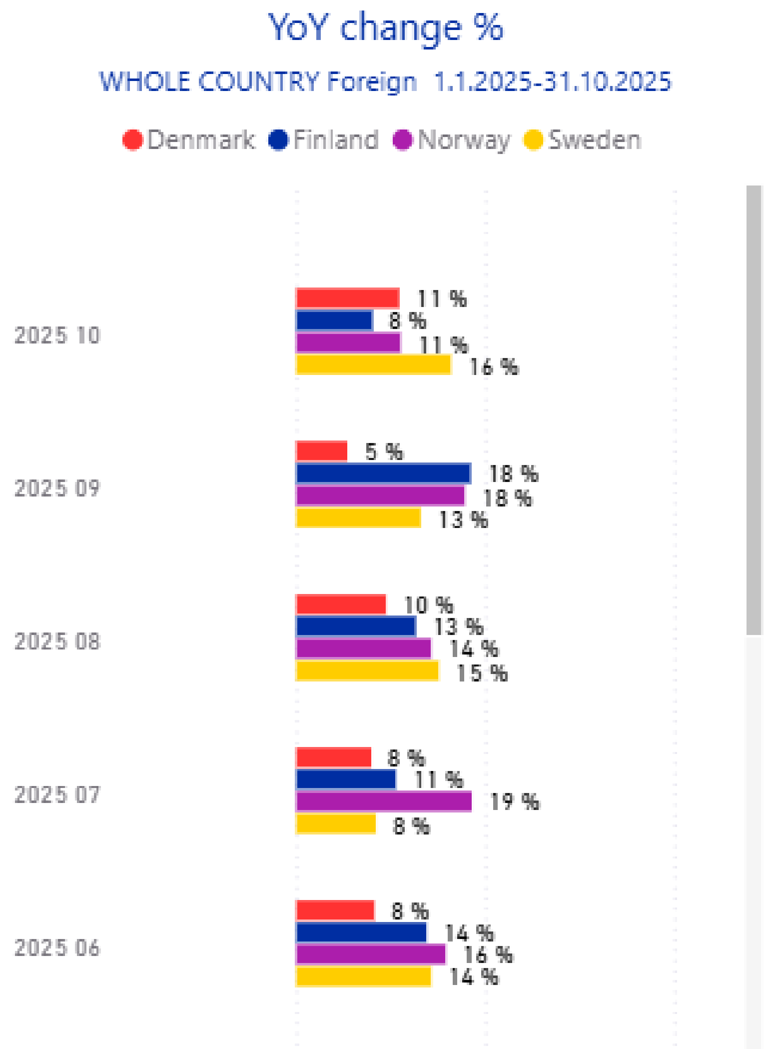
[Nordic report]

Monthly overnights in the Nordics (excl. Iceland) Jan-Oct 2025



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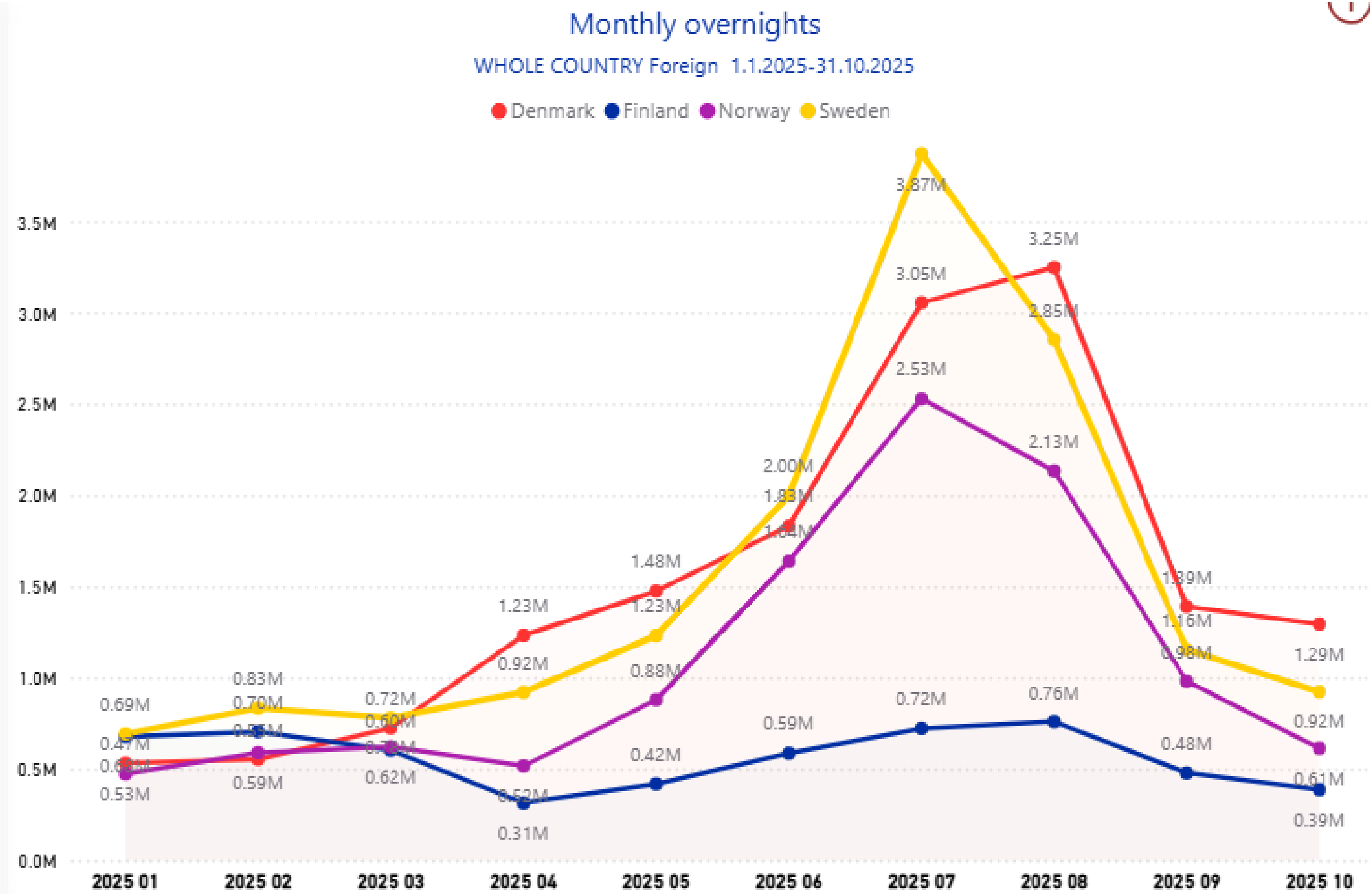

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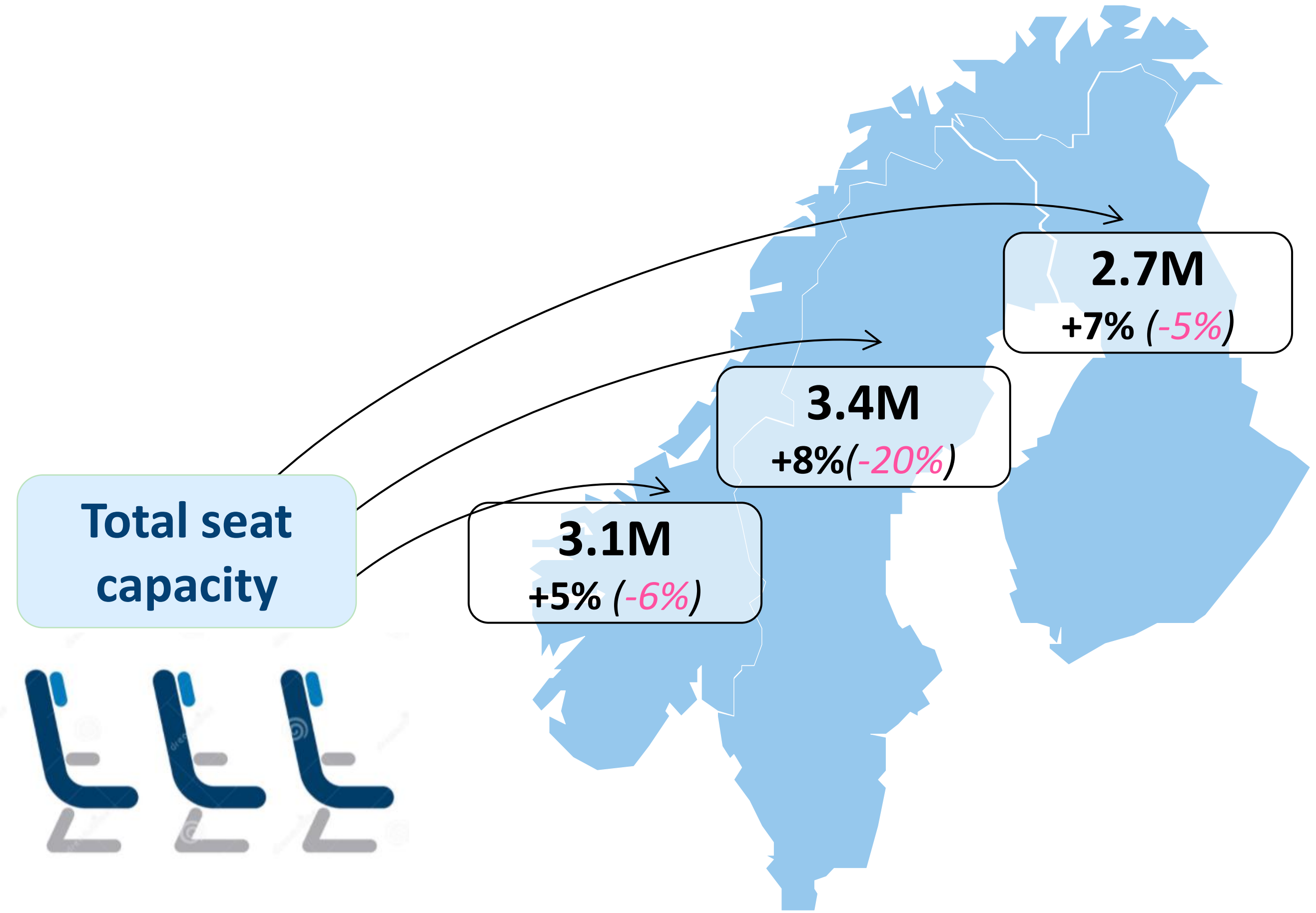
[Nordic report]

International Flight Seat Capacity
Dec 2025 – Feb 2026

- Overall **int'l seat capacity to Finland** during the high winter season is showing a **7% increase** compared to last winter.
    - Seat capacity from **Europe** is set to grow by **7%**, *reaching also a 1% higher level than before the pandemic*. Weekly flights from Europe will increase to both Helsinki and airports in the Lapland region compared to the previous winter.
    - 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 **US** 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

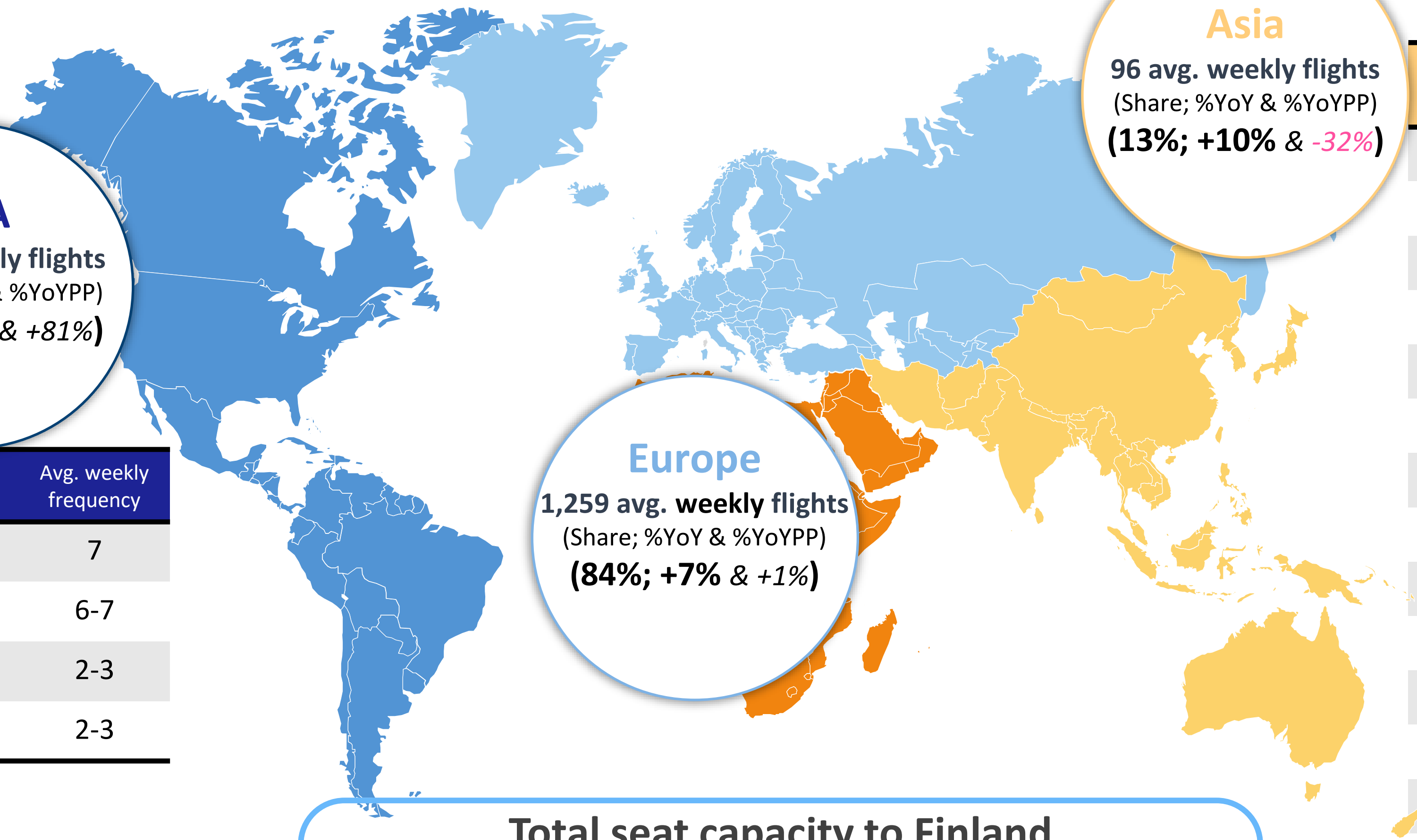
Comparison to previous winter and pre-pandemic



Database update 22-Nov

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

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



USA
21 avg. weekly flights
(Share; %YoY & %YoYPP)
(3%; +20% *& +81%***)**

From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	6-7
Los Angeles (LAX)	HEL	2-3
Miami	HEL	2-3

Europe
1,259 avg. weekly flights
(Share; %YoY & %YoYPP)
(84%; +7% *& +1%***)**

Asia
96 avg. weekly flights
(Share; %YoY & %YoYPP)
(13%; +10% *& -32%***)**

From	To	Average weekly frequency
Bangkok (BKK)	HEL	14
Tokyo (HND)	HEL	10-11
Phuket (HKT)	HEL	7-9
Doha (DOH)	HEL	7
Hong Kong (HKG)	HEL	7
Singapore (SIN)	HEL	7
Seoul (ICN)	HEL	7
Delhi (DEL)	HEL	6-7
Dubai (DXB)	HEL	5-7
Shanghai (PVG)	HEL	6
Osaka (KIX)	HEL	2-4
Tokyo (NRT)	HEL	2-4
Hurghada (HRG)	HEL	2-3
Zhengzhou (CGO)	HEL	1

Total seat capacity to Finland
for Dec 2025 – Feb 2026

2.7 M

+7% vs. **prev. winter** *& -5% vs. winter 2019*

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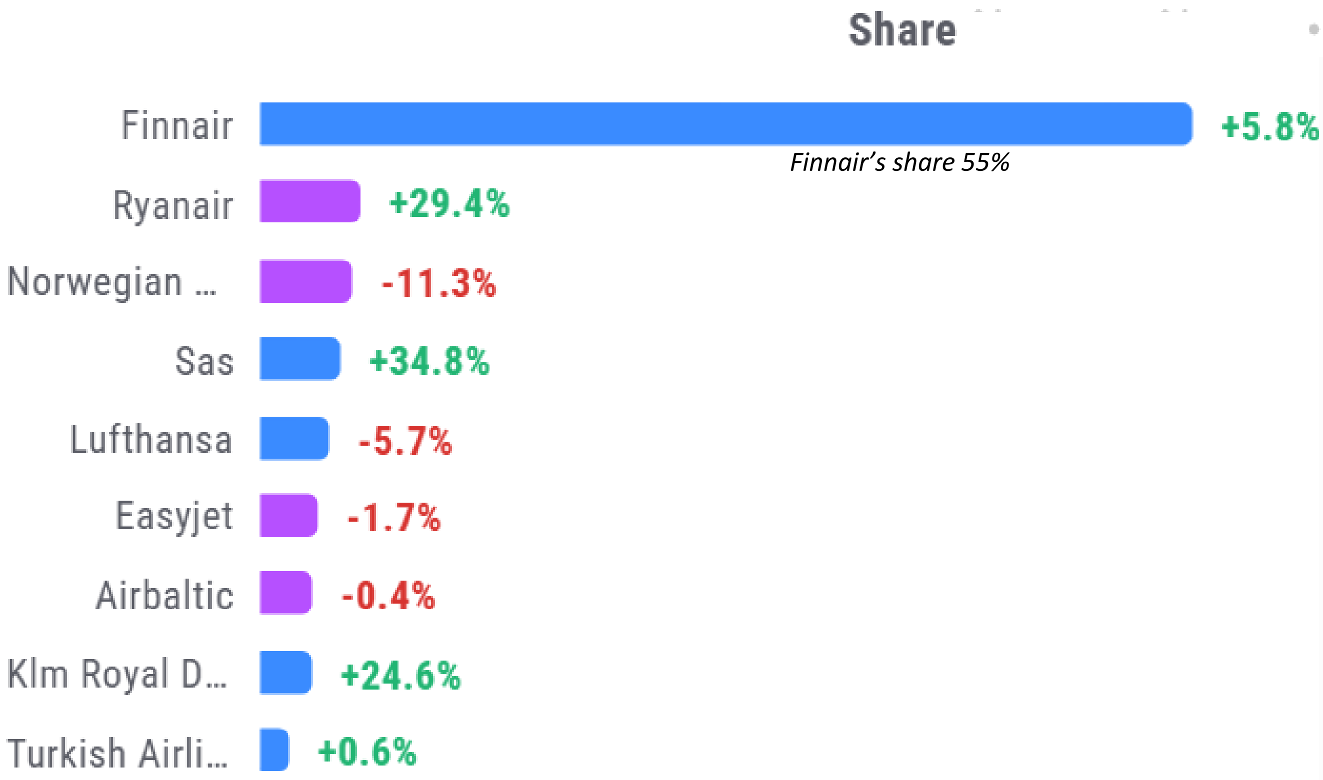
Source: Destination Gateway by ForwardKeys
Database update 22-Nov

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%**	*-4%*
UK	12%	**+1%**	*+9%*
Sweden	10%	**-1%**	*-33%*
Spain	10%	**-4%**	*-14%*
Denmark	6%	**+41%**	*+3%*
Netherlands	6%	**+20%**	*+30%*
France	5%	**-9%**	*+37%*
Italy	4%	**+15%**	*+58%*
Norway	4%	**+17%**	*+1%*
Latvia	4%	**+7%**	*+64%*
Poland	3%	**+8%**	*+26%*
Switzerland	3%	**+8%**	*+38%*
Turkiye	3%	**+5%**	*+90%*
Estonia	3%	**-3%**	*+37%*
Belgium	2%	**+2%**	*+34%*

Top10 airlines operating from Europe to Finland

+6.7%
YOY for selected airlines



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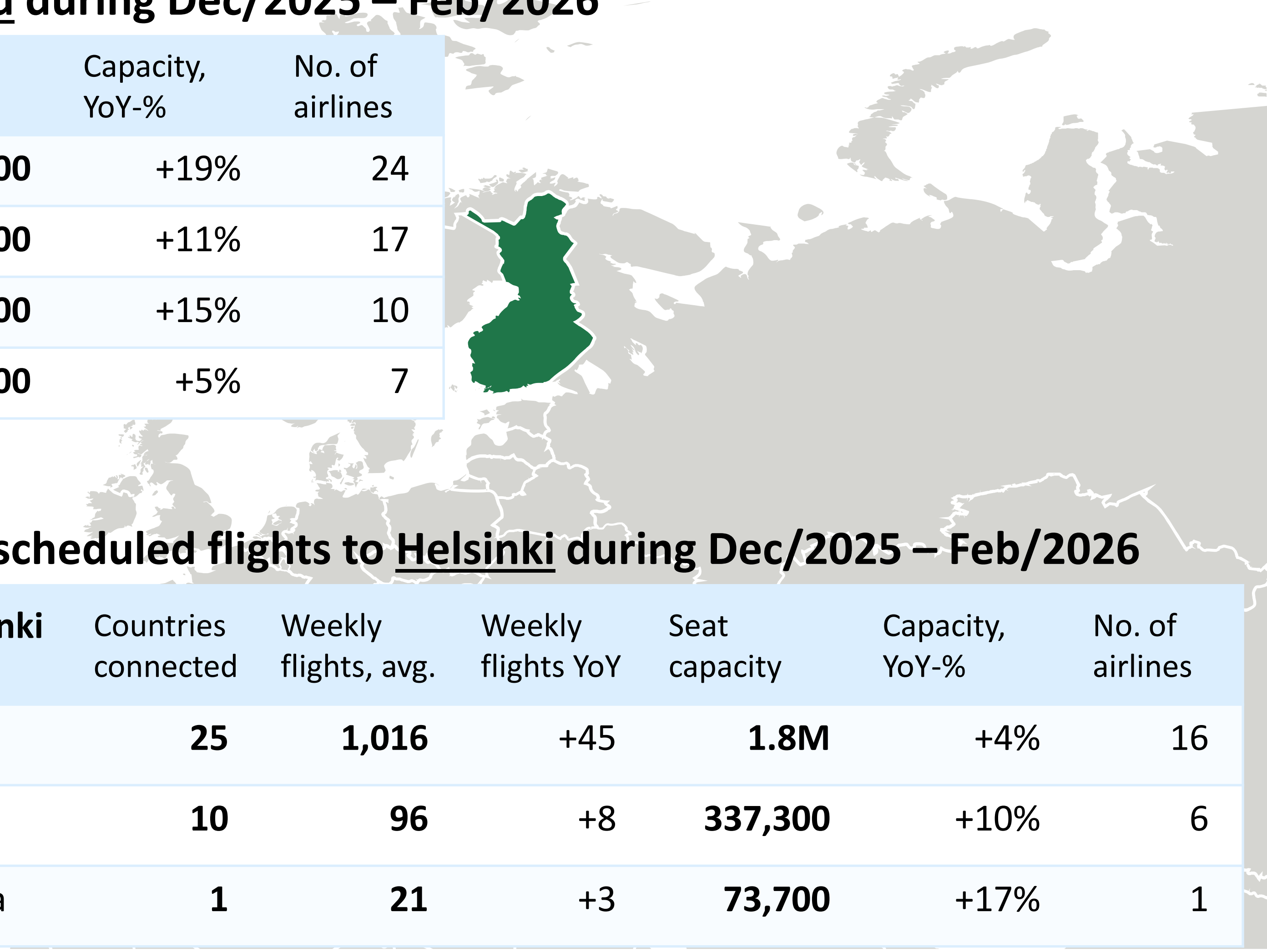
Source: Destination Gateway by ForwardKeys
Database update 22-Nov

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	**16**	**116**	+15	**259,000**	+19%	24
Kittilä	**13**	**39**	+4	**84,800**	+11%	17
Ivalo	**7**	**12**	+2	**25,100**	+15%	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

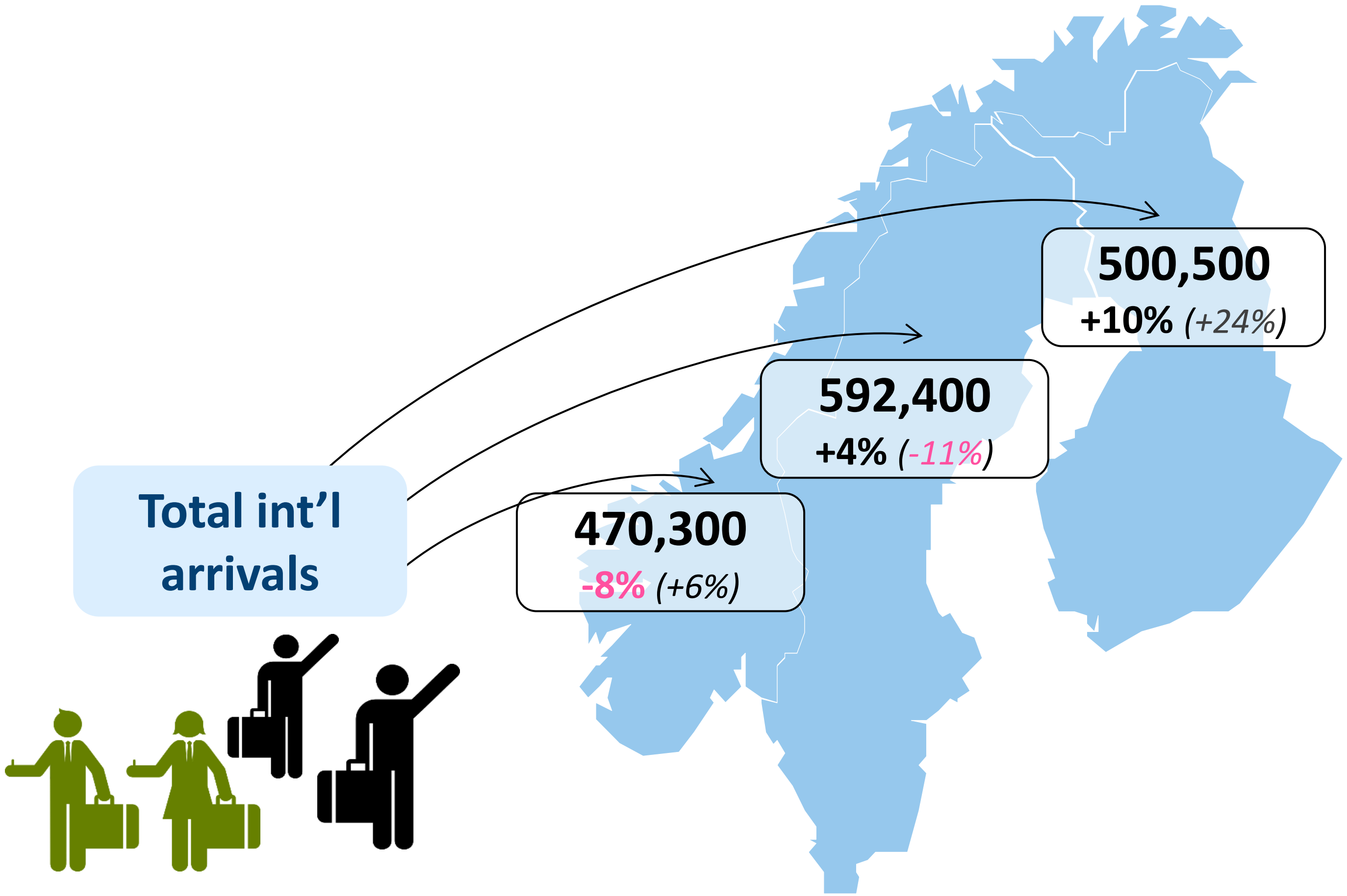
To **Helsinki** from	Countries connected	Weekly flights, avg.	Weekly flights YoY	Seat capacity	Capacity, YoY-%	No. of airlines
Europe	**25**	**1,016**	+45	**1.8M**	+4%	16
Asia	**10**	**96**	+8	**337,300**	+10%	6
America	**1**	**21**	+3	**73,700**	+17%	1

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**, the **Netherlands**, **Italy**, **Spain**, **Switzerland**, the **US**, **Denmark**, **Switzerland**, and **Sweden** among the main source markets are projected to surpass levels seen during the previous winter.
  - 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 to **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 winter.

Forecast of total int'l arrivals to FI, SE & NO in Dec/2025 – Feb/2026

Comparison to previous winter *(and pre-pandemic)*



Database update 23-Nov

Source: Destination Gateway by ForwardKeys

Forecast of Flight arrivals in Dec 2025 – Feb 2026

Comparison to previous winter *(and pre-pandemic)*

Worldwide (excl. domestic) → Finland

Database update 23 Nov

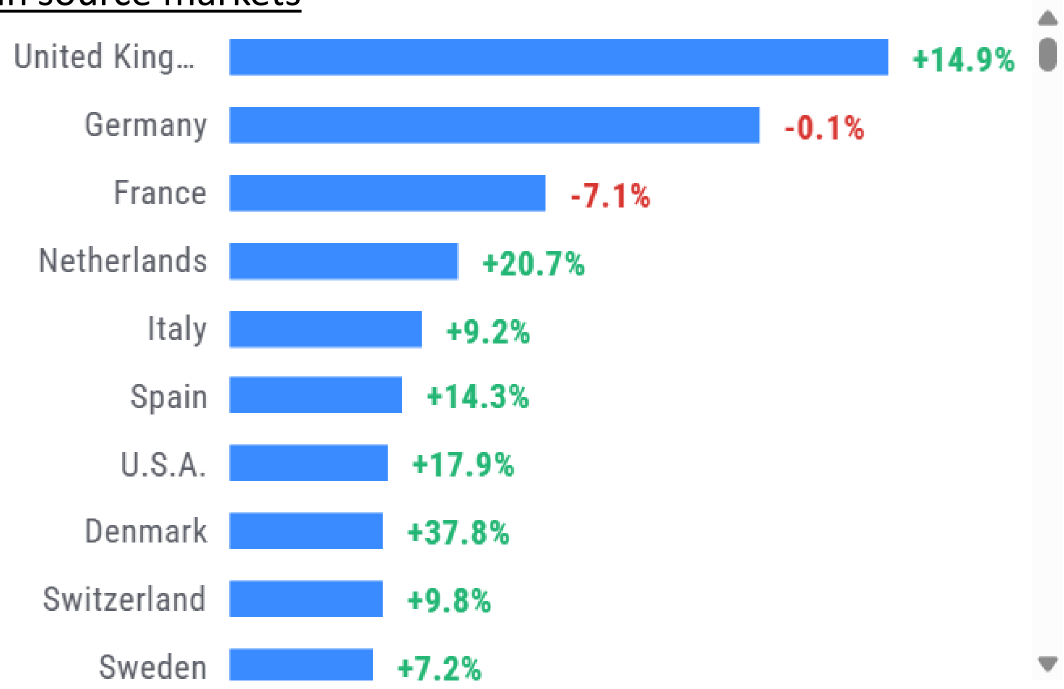
Filtered period | 01 Dec 2025 - 28 Feb 2026

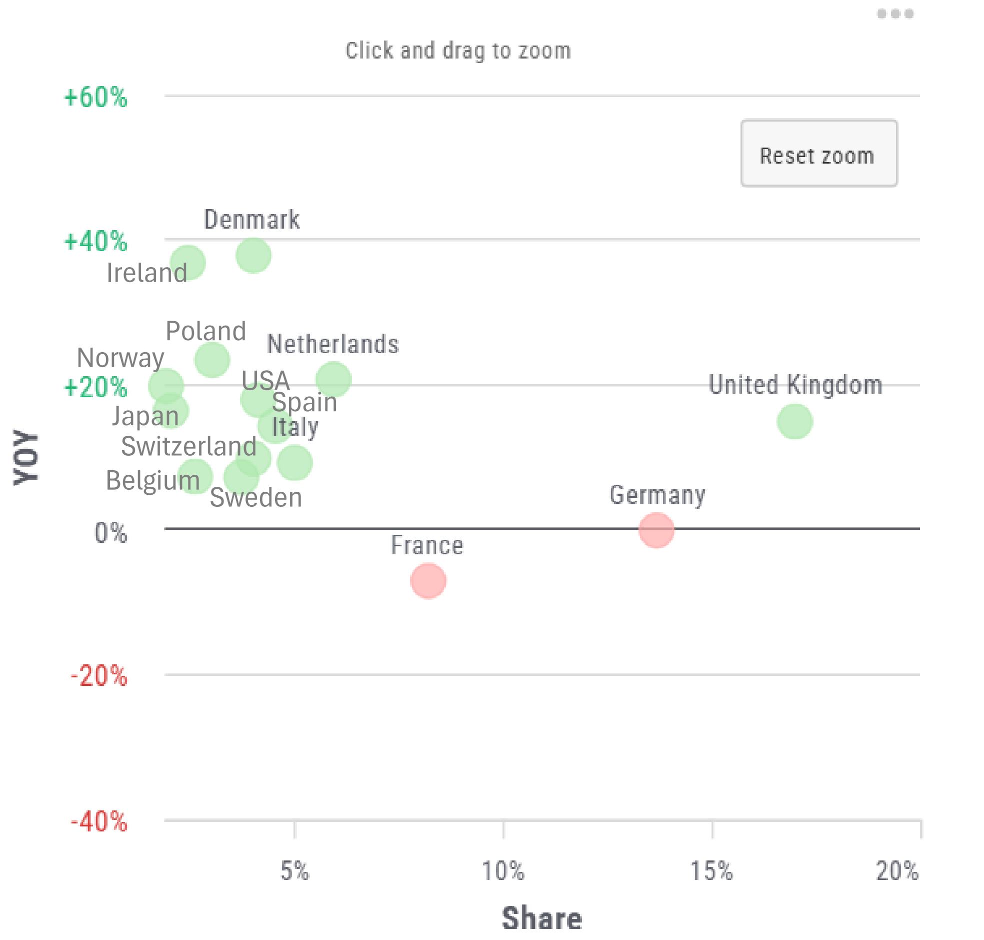
500,532
tourist arrivals

+10.2% *(+24%)*
YOY for selected origins

Main source markets

Share **YOY**





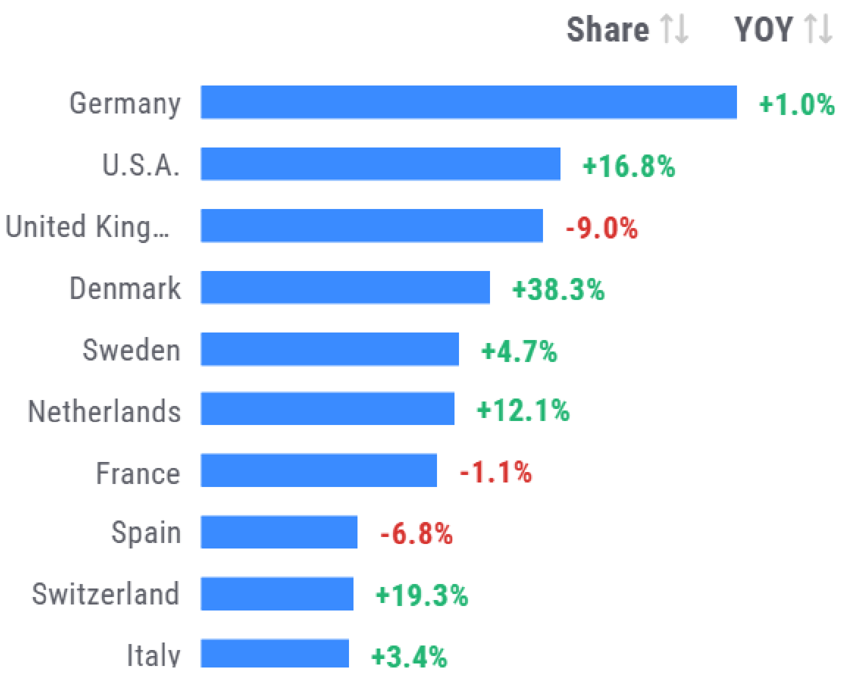
Forecast for total int’l arrivals to Finnish airports during Dec/2025 – Feb/2026

Worldwide (excl. domestic) → Helsinki (HEL)

Filtered period | 01 Dec 2025 - 28 Feb 2026

219,950 tourist arrivals

+6.1% YOY for selected origins



Database update 23-Nov

Worldwide (excl. domestic) → Finland

Filtered period | 01 Dec 2025 - 28 Feb 2026

500,532 tourist arrivals

+10.2% YOY for selected origins

Arrival destination	Forecast of Arrivals 12/2025-02/2026	Share of int’l arrivals	Change vs. 12/2024-02/2025
Helsinki	**220,000**	**44%**	**+6%**
Rovaniemi	**141,100**	**28%**	**+16%**
Kittilä	54,100	11%	**+6%**
Ivalo	30,600	6%	**+8%**
Kuusamo	19,700	4%	**+20%**
Oulu	10,100	2%	**+7%**
Turku	9,200	2%	**+49%**
Vaasa	4,200	1%	**+4%**
Kuopio	3,800	1%	**+28%**
Kajaani	2,500	-	**+55%**
Tampere	1,900	-	**+1%**

To Joensuu, Jyväskylä, Kokkola/Pietarsaari, Kemi/Tornio, Mariehamn, Pori, and Savonlinna less than one thousand forecasted int’l arrivals for winter high season 2026.

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Source: Destination Gateway by ForwardKeys

Visit Finland