



Visit Finland

VF seasonal follow-up

Spring 2026 & Outlook for Summer 2026

Including 2025 statistics for Short-term rentals

Summary

Travel to Finland and to the Nordics

Border survey: Between June 2025 and May 2026, foreign visitors made **4.7 million** trips to Finland, marking a **5% decrease**. Total spending was **€3.2 billion**, reflecting a decrease of **13%** compared to the previous 12-month period.

- **Leisure travel** accounted for the majority, representing **78%** of all trips. Leisure trip numbers decreased slightly while spending by these visitors fell by **10%**. **Business travel** made up 22% of trips but declined sharply by **13%** in volume, with business traveller expenditure dropping significantly by **21%**.
- **Key markets and travel behaviour:** Neighbouring countries remain important, with **Estonia, Germany, Sweden, and the UK** as the main sources of visitors. On average, travellers booked their trips about **2.7 months** in advance, slightly earlier than in the previous 12-month period. The median length of stay remained at **4 nights**, and only 7% of all visitors used package tours, showing a slight decline and indicating a rise in independent travel.

➤ **Spring 2026:** Both **leisure and business trips to Finland experienced big drops** during the spring season. **Total spend** by both travel groups **decreased substantially** compared to spring 2025, resulting from smaller number of trips to Finland in April and May and from the growing cautiousness among the consumers which has had an impact also on travel behaviour.

- The number of **holiday trips** and **spending of holiday travellers declined** as well during the spring season. However, **median length of stay increased by 1 night** so the impact for overnights spent in Finland was showing only a small decline from previous year, and at the same time the use of hotel accommodation increased. As holiday makers made fewer trips to Finland and their trips lasted longer, also the **carbon footprint decreased**. **Spend per holiday trip increased** which also meant that **carbon efficiency remained** on the same level as last spring.

Summary

Travel to Finland and to the Nordics

Registered foreign overnights: Even though the visitor numbers to Finland declined sharply during April and May, holiday travellers made longer trips during the spring season, and they used hotel accommodation more often than during the previous year. Consequently, the number of **registered foreign overnights increased by 4%** from last year reaching **2.8 million** overnight stays during January to May. The top source markets were **Germany, France, the UK, the US, the Netherlands, and Sweden.**

- **Spring 2026:** Between March and May 2026, total foreign overnights increased slightly (+2%) reaching **1.4 million**. The leading source markets during the spring season were **Germany, Sweden, and the US.**
 - **Nearly half** of foreign overnight stays were registered in the **Helsinki region**, while the **Lapland region** accounted for **27%** of the foreign overnight stays.

Short-term rentals: The importance of short-term rentals via international platforms continued to grow. In **2025**, foreign overnights in short-term rentals added up to **3.2 million**, so the total number of **foreign paid overnights** reached **10.4 million**, which was **15% more** than in 2024 *and 17% more than in 2019*.

- The share of foreign overnights in short-term rentals was **31%** of the paid overnight stays in **2025**. As the biggest growth in short-term rentals in recent years has occurred during the winter months, **January-March 2026** marked again new records in short-term rentals, and the share for Q1-2026 rose to **36%**.
- **Lapland region 2025:** The share of overnights in short-term rentals in **Rovaniemi** was **more than half** of the total number of **foreign paid overnights**. Beside in Rovaniemi, the growth in short-term rentals has increased during the latest years also in **Kittilä-Levi, Ruka-Kuusamo and Kolari-Ylläs.**

Summary

Travel to Finland and to the Nordics

The Nordic region: The Nordic countries continued to experience **good growth in foreign overnight stays** during January–May 2026.

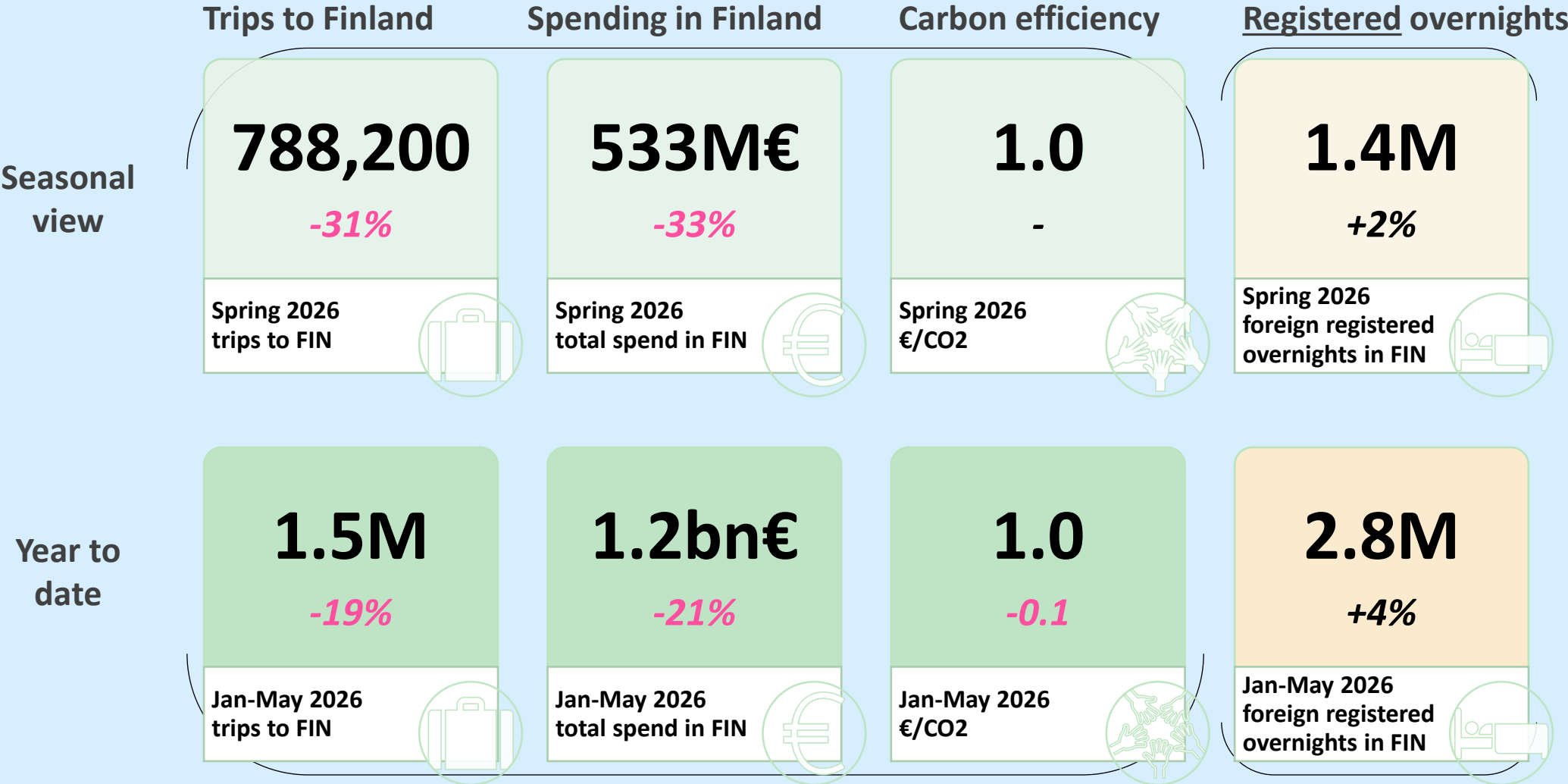
- **Denmark** posted the largest absolute and relative increase, while **Finland** recorded the lowest growth.
- **Market shares remained** the same as the same period last year: Denmark had the largest share at 31%, Sweden at 29%, Norway at 21%, and Finland held 18% share.
- **Germany** was the leading source market, followed by **the US** and **the UK**.

Summer 2026 outlook:

- Finland's **international seat capacity** for summer 2026 is projected to **increase by 5%** compared with last summer.
 - Growth is led by China: **Juneyao Air** has daily flights from Shanghai to Helsinki from the end of June, and **China Southern Airlines** will operate 3-7 flights a week from Beijing Daxing airport to Helsinki.
 - Capacity on some routes will decline, including Finnair's London Heathrow–Helsinki service, Air France's Paris CDG–Helsinki service, and Finnair's Dallas, Los Angeles and Seattle services
- **International flight arrivals** to Finland are forecasted to **increase by 9%** compared with last summer.
 - Key source markets are **the US, Japan, Germany, Sweden** and **China**.
 - **Helsinki-Vantaa** will receive the majority of international arrivals, accounting for 96% of the summer total. Some of the travellers will stay in the capital region and some will continue by train or by car to other parts of Finland.

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

Compared to corresponding period in *previous year*



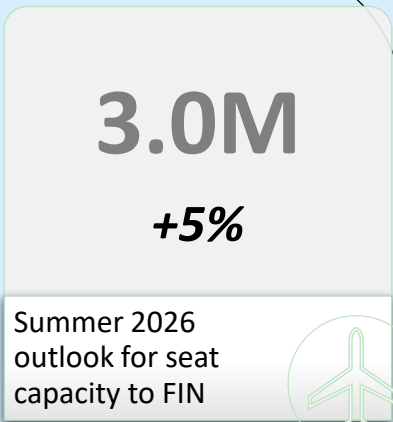
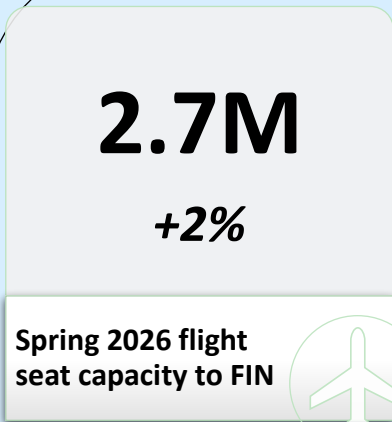
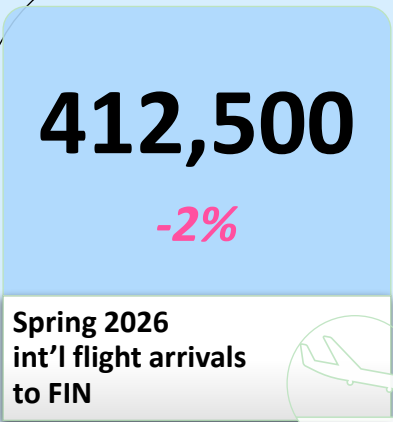
Int'l Flight Arrivals* & Seat Capacity to Finland

Compared to corresponding period in *previous year*

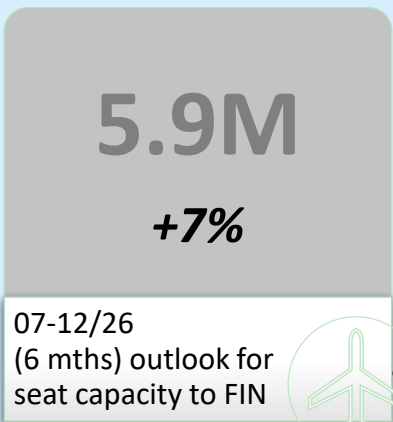
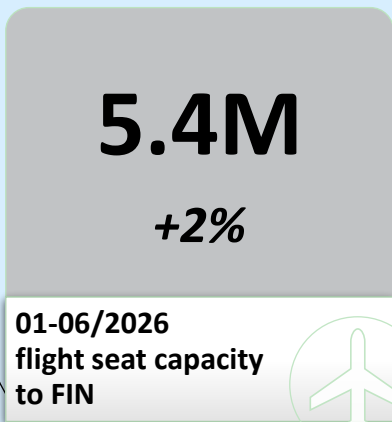
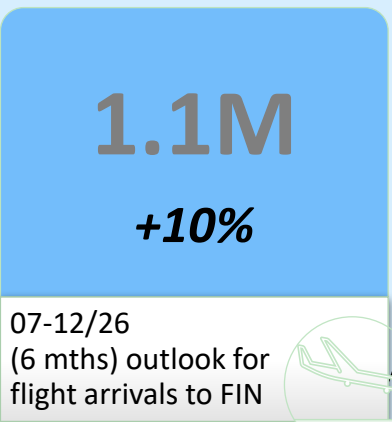
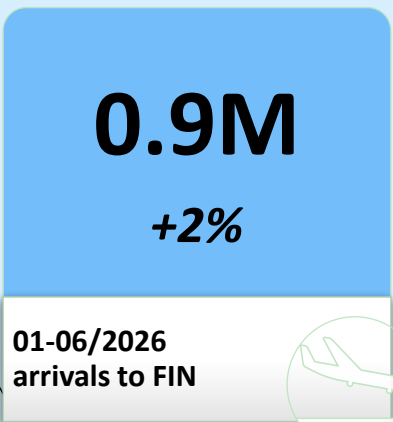
Flight arrivals / outlook for arrivals*

Seat capacity

Seasonal
historical
& forecast
view



Year to
date
historical
&
6 months'
forecast
view



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

Border Survey

Latest 12 months (Jun/2025 – May/2026)

- Foreign visitors made **4.7 million trips to Finland** over the past 12 months, reflecting a **5% decrease** compared to the period from June 2024 to May 2025. Also, total spending in Finland dropped to **3.2 billion euros**, showing an **13% decrease** from the previous 12 months period.
- **Leisure travel** accounted for **78%** of all trips, with trip numbers slightly declining (-1%) and spending weakening by 10%.
- **Business travel** comprised 22% of all trips but decreased by 13%, with expenditure from business travellers dropping by 21%.

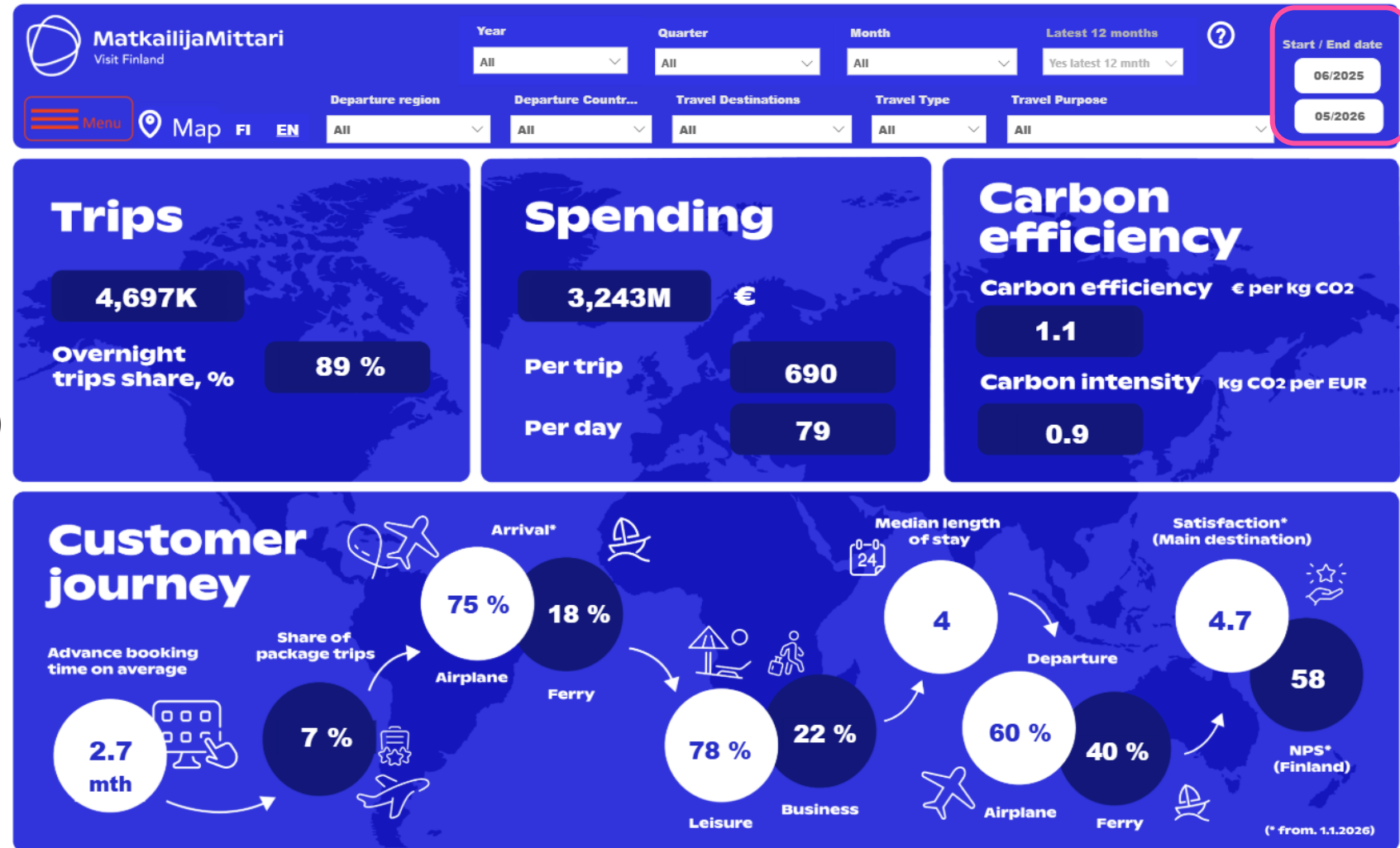
Jan-May 2026

- The total number of **trips to Finland** and the **total spending in Finland decreased** clearly during January to May. The biggest drop was in business travel, but also leisure travel remained on a lower level than the year before.
- Even though both the amount of **leisure trips** and **total spending** by leisure travellers **increased** from **China, Poland, Canada, the Netherlands, and Italy**, there were big drops from travel and spending from the neighbouring countries, Estonia and Sweden, as well as from the US, France, and Spain compared to the previous year.
- **Business trips** and **total spending** by business travellers **decreased** from **the main source markets, except Sweden**.

Border Survey: Latest 12 months (Jun/2025 – May/2026)

Foreign visitors in Finland

- **4.7 million** visitors (YoY **-5%**)
 - 89% overnight trips
- Spending **3.2 billion€** (YoY **-13%**)
 - 690 € / trip (YoY **-9%**)
 - 79 € / day (YoY **+1%**)
- **78%** travelling for **leisure** (leisure trips **-1%** & spending **-10%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.1 months**)
- Share of package trips **7%** (YoY **-1 %-points**)
- Median length of stay **4 nights** (YoY no change)



Border Survey: Latest 12 months (Jun/2025 – May/2026)

Foreign visitors in Finland

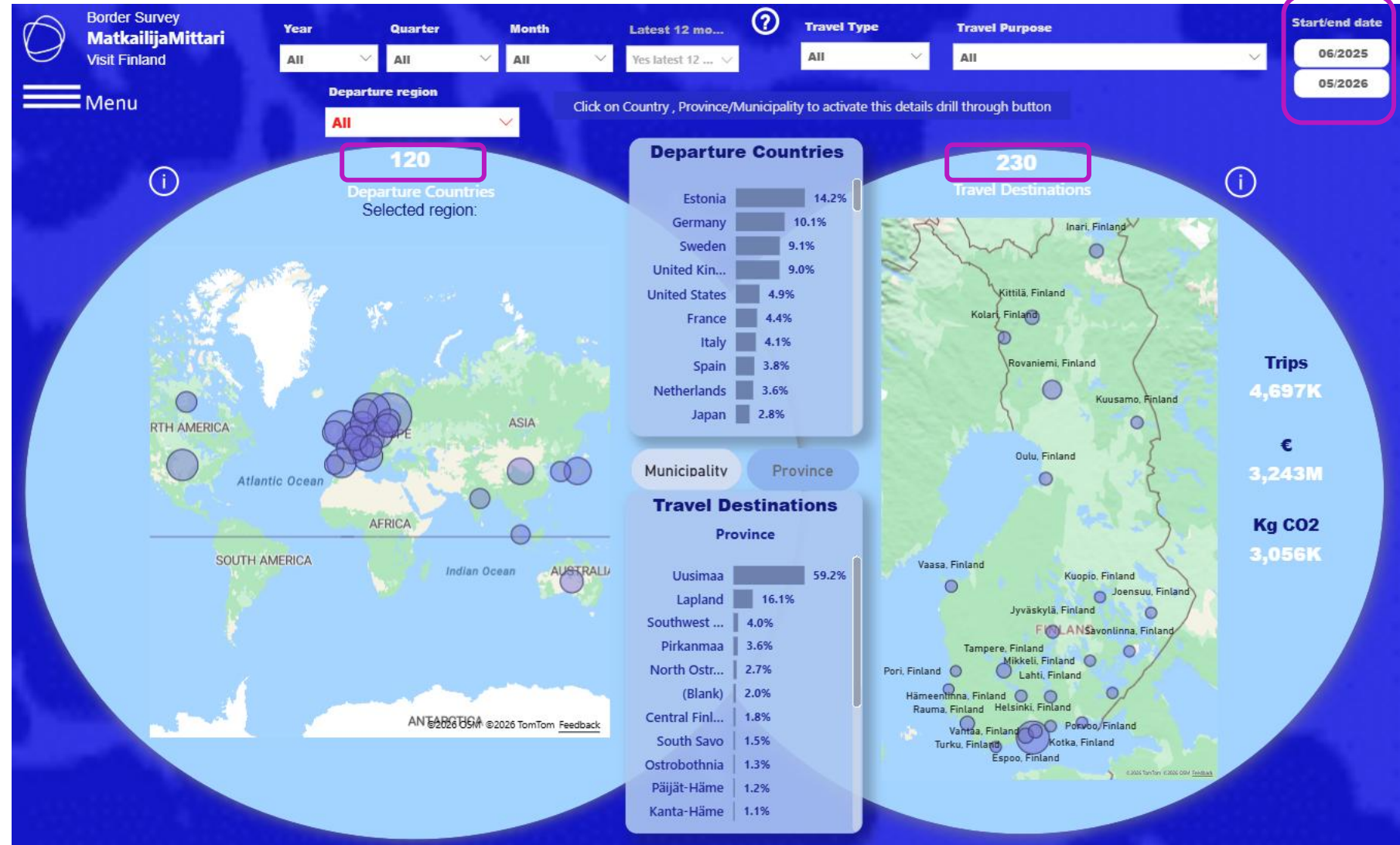
[Link to the report:](#)
[Matkailijamittari - Visit Finland](#)

Top10 source markets for leisure/personal trips

- **Germany** (11% of total leisure)
- **Estonia** (11%)
- **UK** (10%)
- **Sweden** (8%)
- **USA** (5%)
- **France** (5%)
- **Italy** (4%)
- **Spain** (4%)
- **Netherlands** (4%)
- **Japan** (4%)

Top4 source markets for work related trips

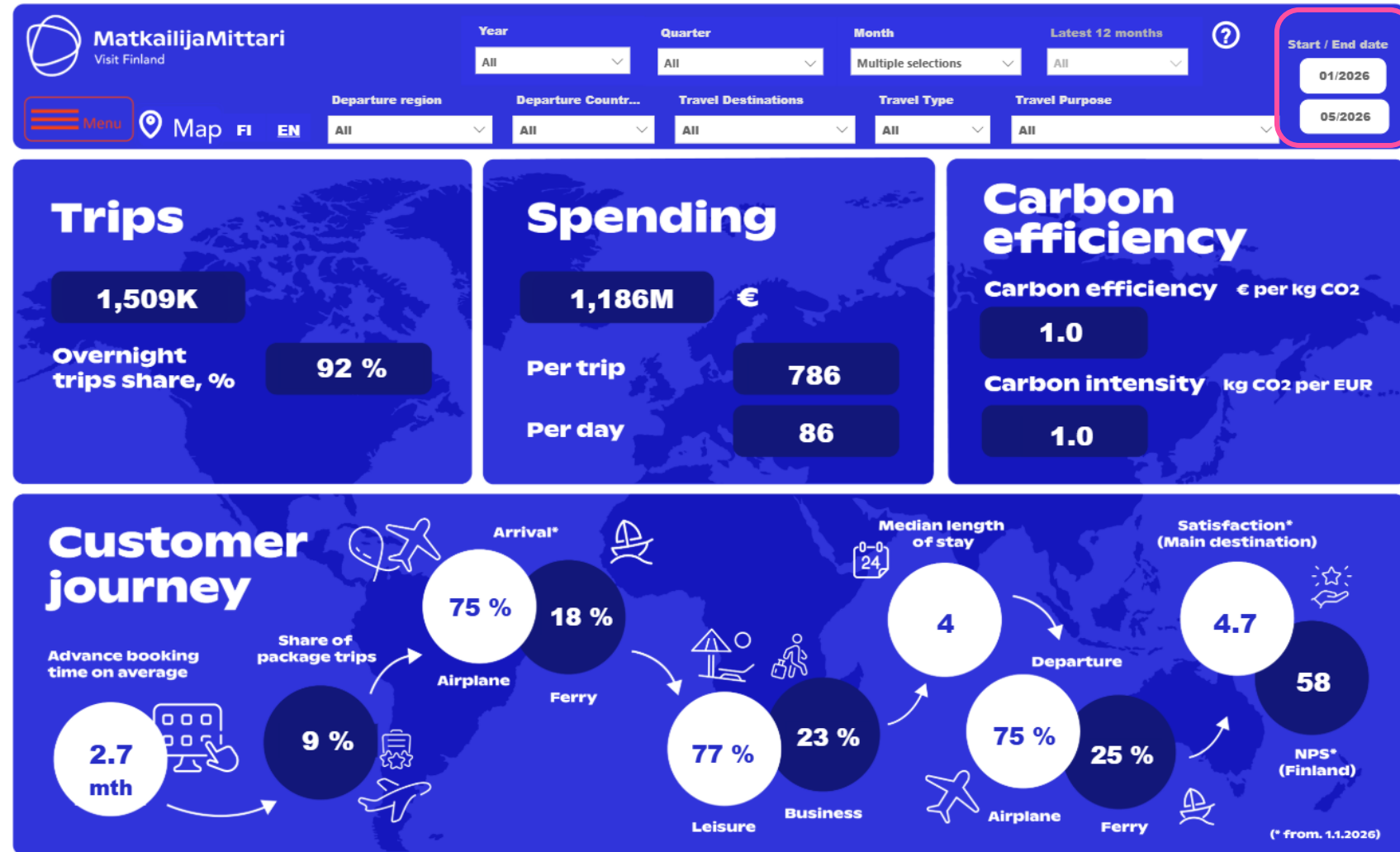
- **Estonia** (26% of total work)
- **Sweden** (12%)
- **Germany** (6%)
- **UK** (6%)



Border Survey: January – May 2026

Foreign visitors in Finland

- **1.5 million** visitors (YoY **-19%**)
 - 92% overnight trips
- Spending **1.2 billion€** (YoY **-21%**)
 - 786 € / trip (YoY **-1%**)
 - 86 € / day (YoY **-8%**)
- **77%** travelling for **leisure** (leisure trips **-13%** & spending **-16%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.1 months**)
- Share of package trips **9%** (YoY no change)
- Median length of stay **4 nights** (YoY no change)

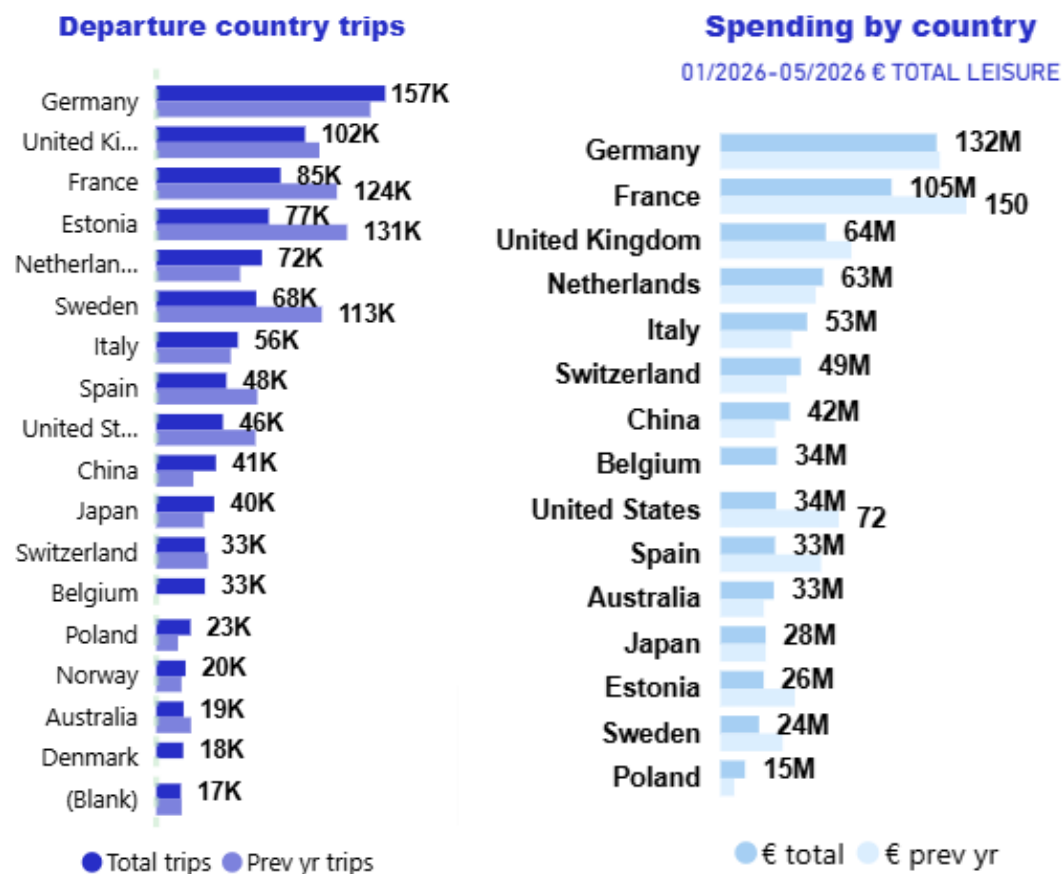


Border Survey: January – May 2026

Foreign visitors in Finland

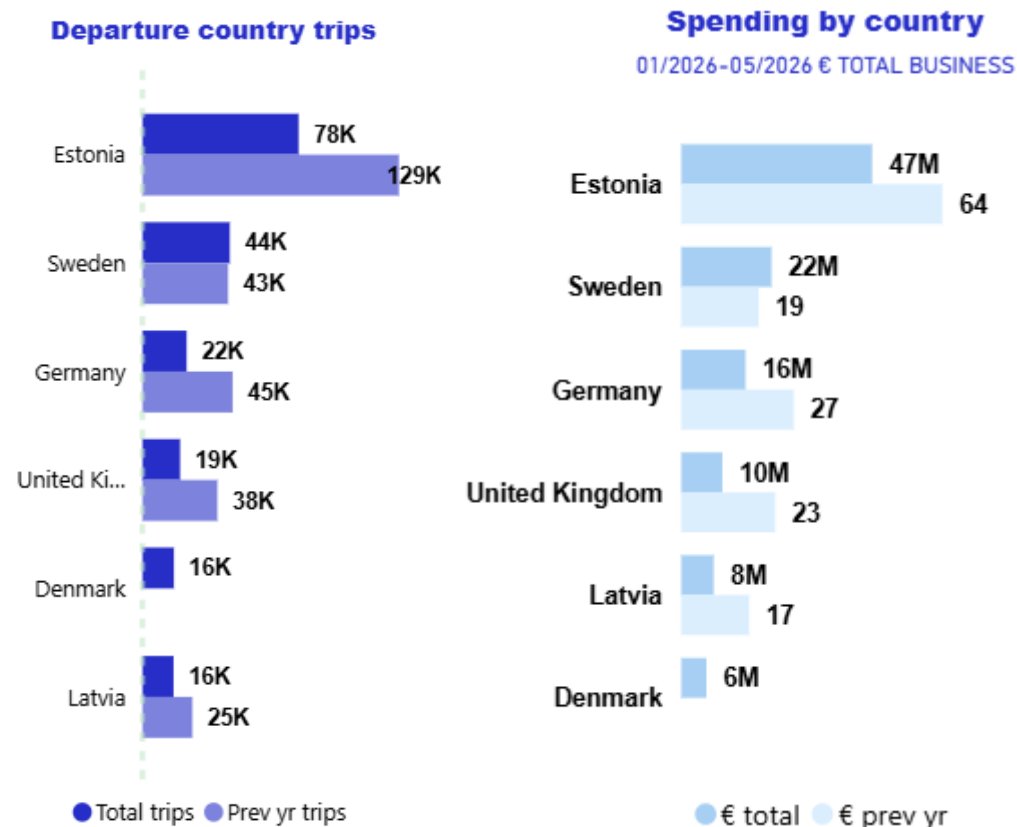
Leisure trips

Leisure trips and **spending by leisure travellers** decreased especially from the UK, France, Sweden, Spain, and the US



Business trips

Business trips and **spending by business travellers** decreased especially from Estonia, Germany, the UK, and Latvia



Seasonality on trips and spending – Spring 2026

- Both **leisure and business trips** to Finland experienced a big **drop** this spring compared to the previous year.
- At the same time, **total spend by both travel groups** also **decreased** substantially compared to spring 2025, resulting from smaller number of travellers to Finland and from the growing cautiousness among the consumers which has had an impact also on travel behaviour.

Holiday travel in spring 2026

- Holiday trips and spending **declined** clearly during spring compared to the previous year.
- However, **median length of stay increased by 1 day** so the impact for overnights spent in Finland was showing only a small drop from previous year. Also, **the use of hotel accommodation increased**.
- As holiday makers made **fewer trips to Finland and the trips lasted longer**, also the **carbon footprint decreased**. **Spend per trip increased** which also meant that **carbon efficiency remained on the same level** as last spring.
- Holiday travel from **Japan and China increased** compared to the previous year. The total spend by the **Chinese holiday makers increased substantially** along with their **spending per trip and per day doubling** compared to spring 2025.
- Also, the **French, German, Italians, and Swedish** spent more per their holiday trip. **Median length of stay** increased or remained the same as during the previous spring from nearly all main source markets.

Seasonality of trips to Finland & total spending

Both leisure and business trips to Finland experienced a big drop this spring compared to the previous year.

At the same time, **total spend by both travel groups** also **decreased** substantially compared to spring 2025, resulting from smaller number of travellers to Finland and from the growing cautiousness among the consumers which has had an impact also on travel behaviour.

ALL VISITORS	Winter-25	Spring-25	Summer-25	Autumn-25	Winter-26	Spring-26
Total trips	1,244K	1,137K	1,643K	972K	1,294K	788K
YoY Total Trips change %	+7 %	+5 %	+6 %	-4 %	+4 %	-31 %
Total Spending	1,230M€	793M€	1,000M€	538M€	1,172M€	533M€
YoY Total Spending change %	+15 %	-8 %	-2 %	-22 %	-5 %	-33 %

LEISURE TRAVELLERS	Winter-25	Spring-25	Summer-25	Autumn-25	Winter-26	Spring-26
Leisure trips	992K	769K	1,358K	659K	1,044K	592K
YoY Leisure trips change %	+10 %	+14 %	+10 %	-5 %	+5 %	-23 %
Leisure spending	1,041M€	542M€	794M€	329M€	998M€	390M
YoY Leisure Spend change %	+20 %	+5 %	+5 %	-28 %	-4 %	-28 %

BUSINESS TRAVELLERS	Winter-25	Spring-25	Summer-25	Autumn-25	Winter-26	Spring-26
Business trips	232K	360K	280K	311K	236K	189K
YoY Business trips change %	-9 %	-7 %	-12 %	+1 %	+2 %	-48 %
Business spending	165M€	246M€	201M€	209M€	161M€	140M
YoY Business Spend change %	-11 %	-27 %	-22 %	-8 %	-2 %	-43 %

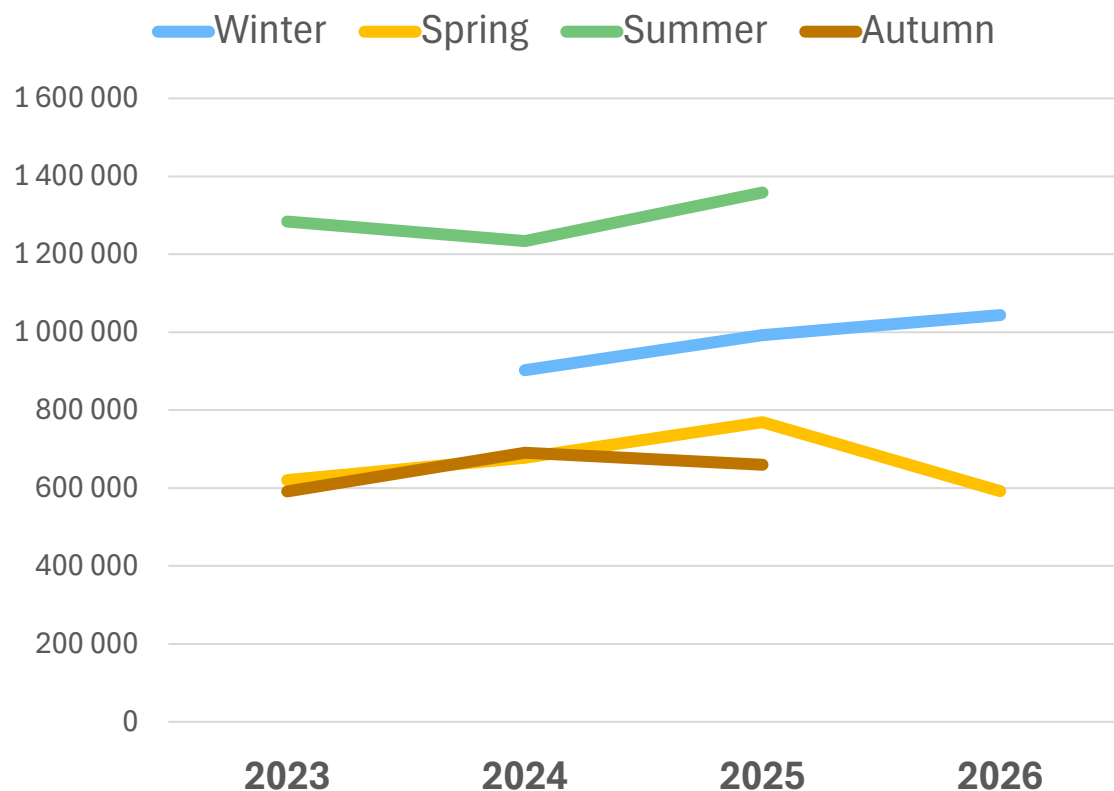
[Link to the report:](#)

[Tourism review \(data view page\)](#)

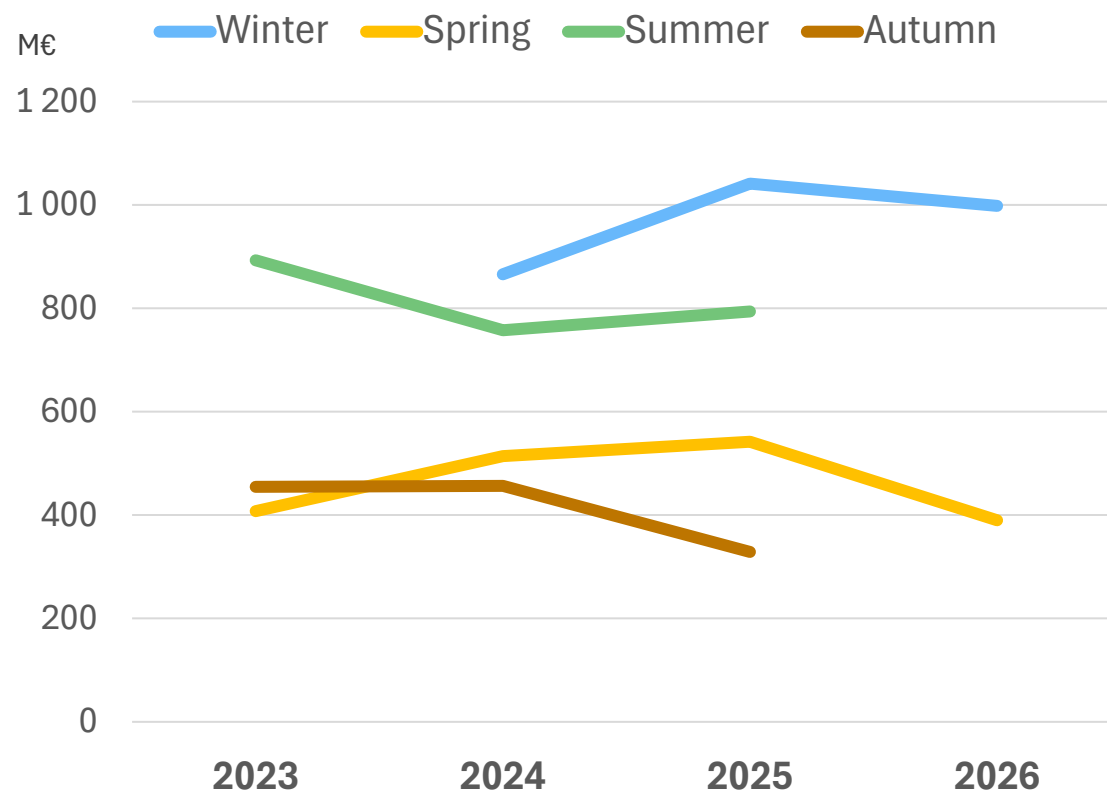
Seasonality trends on leisure trips & spending (M€)

During last winter there was a downturn on spending of the leisure travellers even though the number of trips still increased. However, spring travel had a sharp turn also on the number of leisure trips to Finland and consequently the drop in leisure travellers' spending was very big.

Leisure trips to Finland

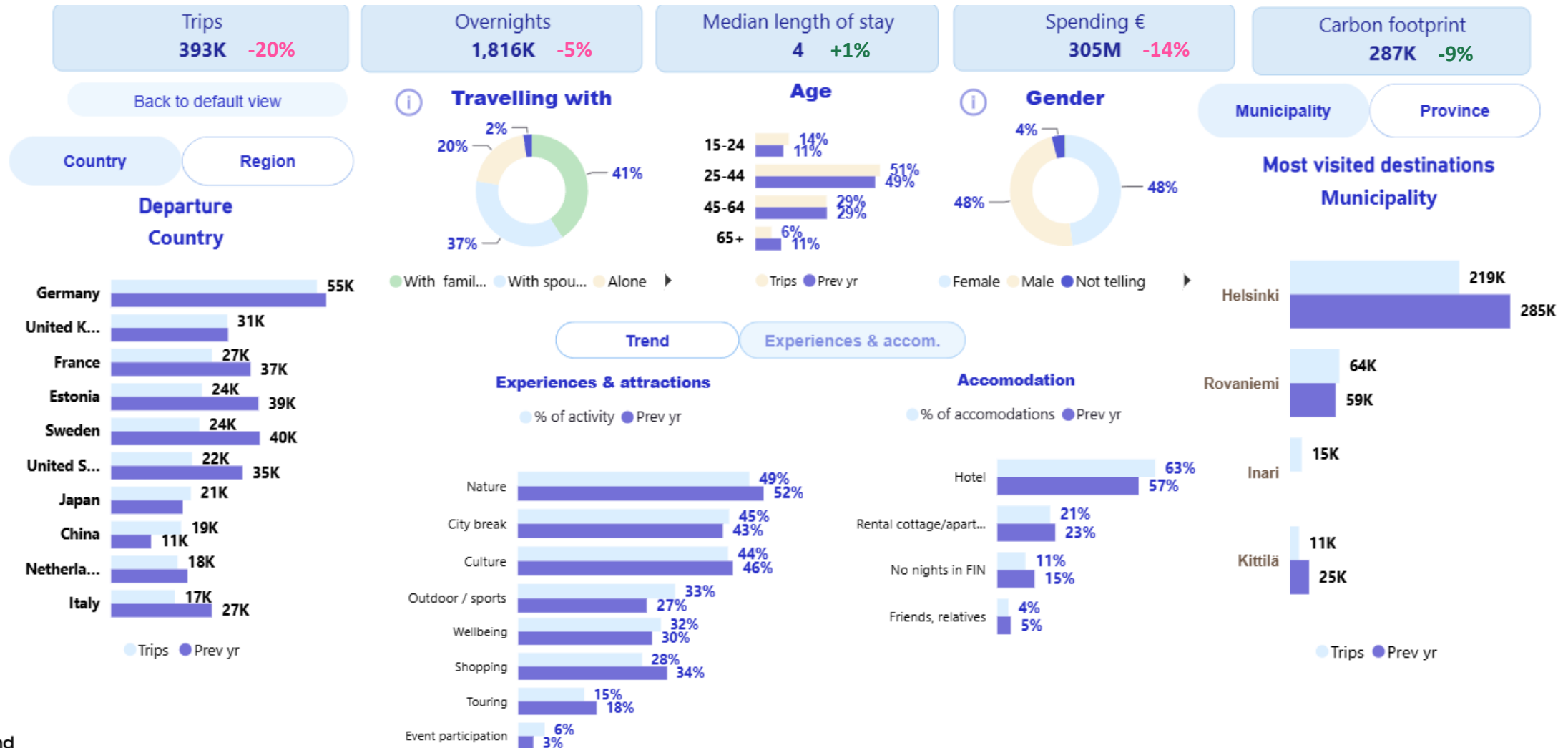


Spending by leisure travellers in Finland



Holiday travellers to Finland in spring 2026 vs. spring 2025

Also, the number of **holiday trips and spending of holiday travellers declined** during the spring season. However, **median length of stay increased by 1 night** so the impact for overnights spent in Finland was showing only a small decline from previous year, and at the same time the **use of hotels increased**. As holiday makers made fewer trips to Finland and the trips lasted longer, also the **carbon footprint decreased**. **Spend per trip increased** which also meant that **carbon efficiency remained** on the same level as last spring.



Holiday travellers' Trips & Spending during Spring 2026

Spring season (March – May 2026): Vacation/recreation travellers in Finland

Holiday travel from **Japan** and **China** increased compared to the previous year. The total spend by the **Chinese holiday makers increased substantially** along with their **spending per trip** and **per day doubling** compared to spring 2025. Also, the **French, German, Italians**, and **Swedish** spent more per trip. Median length of stay increased or remained the same as during the previous spring from nearly all main source markets.

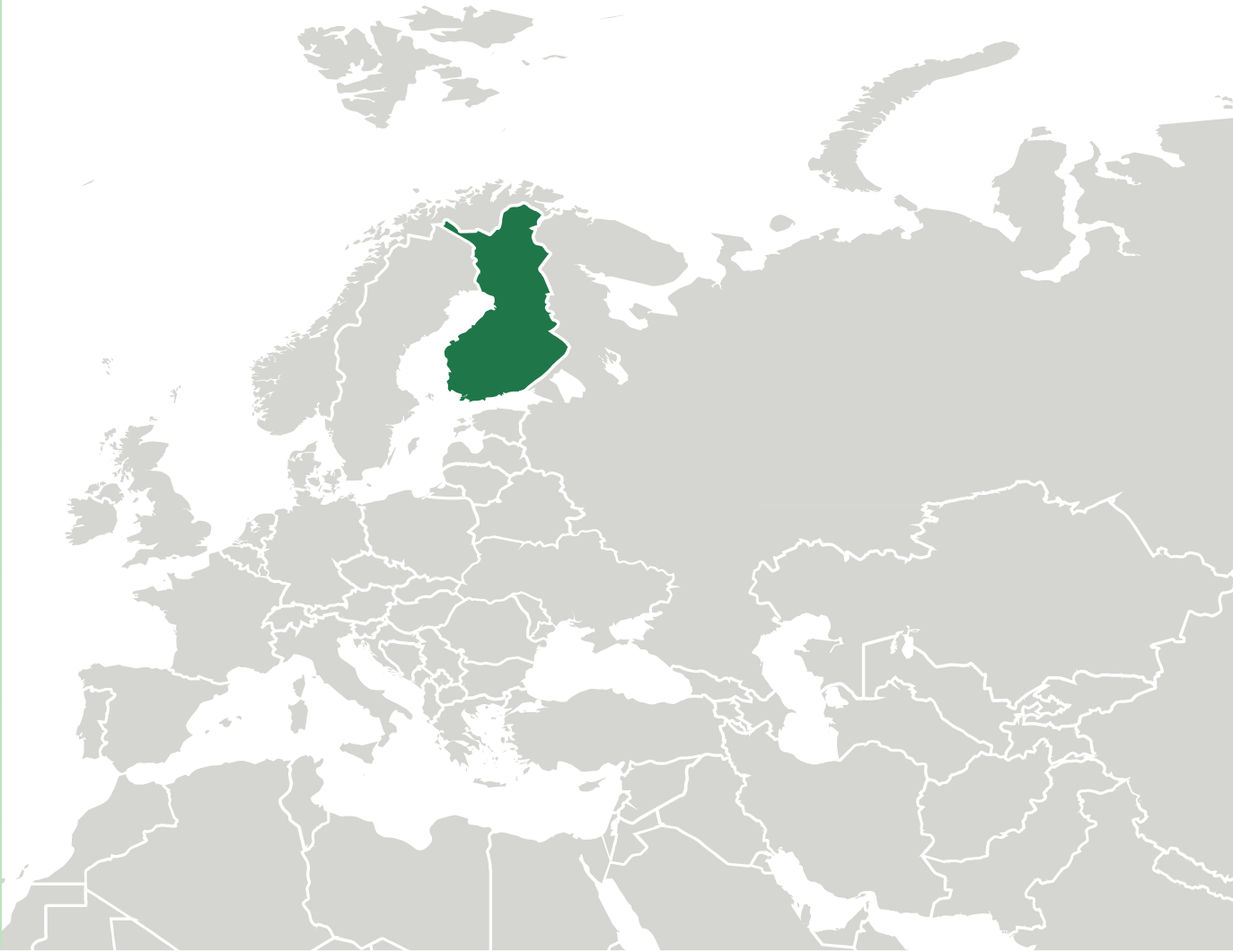
Country	Vacation Trips	YoY change %	Country	M€ total	YoY change %	Country	€ / trip	YoY change %	Country	€ / day	YoY change %	Country	Median length of stay	Previous spring
Germany	55,000	-4%	Germany	46.2	-4%	China	1,197	+101%	China	190	+98%	France	7	5
UK	31,000	-1%	France	27.9	-25%	France	1,033	+3%	Japan	149	-27%	China	5	2
France	27,000	-28%	China	22.5	+254%	Germany	838	+1%	UK	144	+43%	Italy	5	4
Estonia	24,000	-38%	UK	20.1	-19%	Italy	821	+9%	Netherlands	134	-20%	Netherlands	5	7
Sweden	24,000	-41%	Netherlands	14.5	-30%	Netherlands	814	-19%	Germany	121	-22%	Germany	4	4
USA	22,000	-38%	Italy	14.0	-31%	UK	646	-18%	USA	109	-25%	Japan	3	3
Japan	21,000	+11%	Japan	13.7	-7%	Japan	644	-16%	France	106	-32%	UK	3	3
China	19,000	+76%	USA	13.6	-53%	USA	629	-23%	Sweden	97	+18%	Sweden	2	1
Netherlands	18,000	-13%	Sweden	9.3	-8%	Sweden	395	+55%	Italy	93	-42%	USA	2	3
Italy	17,000	-37%	Estonia	7.9	-42%	Estonia	326	-5%	Estonia	39	-50%	Estonia	1	1

Registered Overnights in January – May 2026

- Even though the visitor numbers to Finland declined sharply during April and May, holiday travellers made longer trips during the spring season, and they used hotel accommodation more often than during the previous year. Consequently, the number of **registered foreign overnights increased** by **4%** from last year reaching **2.8 million overnight stays** during January to May.
- The leading source markets for registered overnights were **Germany, France, the UK, the US, the Netherlands, and Sweden.**
- Overall accommodation revenue increased by **3%**, with **foreign revenue rising** by **4%** and domestic revenue by **2%** compared to the same period last year. **Foreign revenue accounted for 41%** of the total accommodation revenue, while **foreign overnights accounted for 34%** of total overnights.

Registered overnights January – May 2026

	Jan-May 2026	Change-% vs. Jan-May 2025
Total	8.4M	+1%
Domestic	5.6M	0%
Foreign, total	2.8M	+4%
Scandinavia	295,400	+7%
EU-27 + UK	1.8M	+4%
Asia	438,700	+2%
America	293,400	+19%



Main source markets

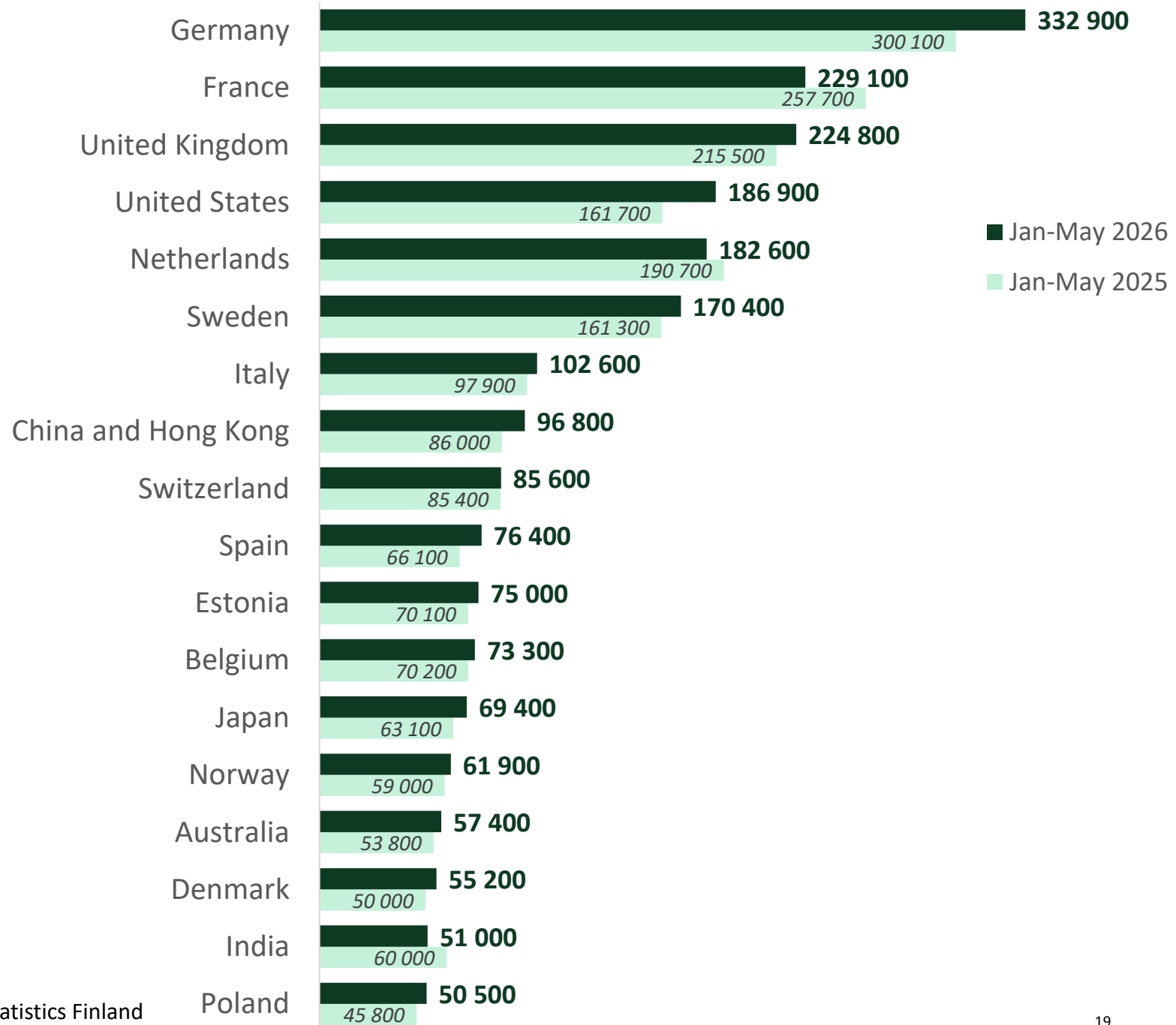
January – May 2026

vs. Jan-May 2025

Between January and May 2026, **Germany** remained the top source market for **registered overnights**, and it is even widening the gap to the other source markets.

Beside Germany, the other most important source markets included **France, the UK, the US, the Netherlands, and Sweden**.

Overnight stays from **nearly all major source markets exceeded** the totals recorded in Jan-May 2025, except for France, the Netherlands, and India.



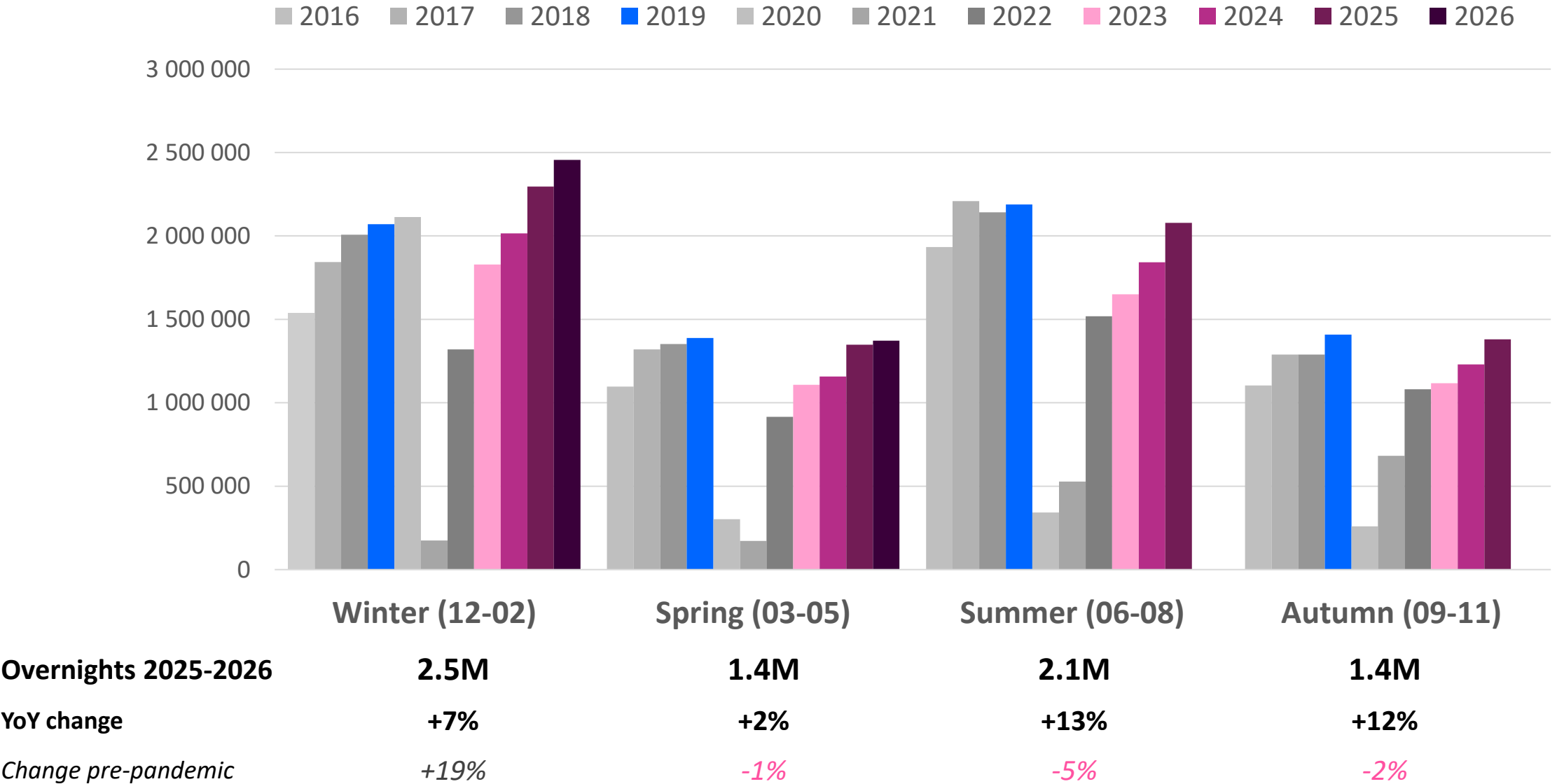
Registered foreign overnights – Spring season 2026

Foreign overnights **increased** by **2%** compared to previous spring and *stayed only slightly (-1%) below the pre pandemic level.*

The biggest source markets during March – May 2026 were **Germany, Sweden, and the US.**

- **Nearly half** of the foreign overnights took place in **Helsinki region**. Overnights remained at the same level as in the previous spring *and were 5% above the level of spring 2019.* Biggest source market was **the US** (+10% YoY), followed by **Germany** (+9%), **Sweden** (+5%), and **the UK** (+5%).
- **Lapland region** was the second biggest with 27% share of foreign overnights (**0% YoY & +11% vs. 2019**).
 - Top destinations: **Rovaniemi** (-7% YoY), **Inari-Saariselkä** (+17%), and **Kittilä-Levi** (-4%). Beside Inari-Saariselkä also **Ruka-Kuusamo** marked very good growth (+32%).
 - Main source markets: **Germany** (+6% YoY), **France** (-10%), and **the Netherlands** (-10% YoY). Beside Germany, there was very good growth from **the US** (+28%), **the UK** (+25%), and **Italy** (+14%).
- In **the Coast & Archipelago region** foreign overnights **increased** by **8%** compared to previous spring. *The region also reached the same level of overnights as in spring 2019.*
 - Top destinations: **Turku** (+10% YoY), **Åland** (-14%), **Oulu** (+9%), and **Vaasa** (+27%).
 - Main source markets: **Sweden** (-3% YoY) and **Germany** (-4%). Even though overnights from the main source markets slightly decreased there were several markets which recorded two-digit relative growth rates.
- Foreign overnights **increased** by **9%** in **Lakeland**. *However, the gap to spring 2019 was still -38%.*
 - Top destinations: **Tampere** (0% YoY), **Jyväskylä** (+33%), and **Lahti** (0%).
 - Main source markets: **Germany** (+15% YoY), **the US** (+66%), and **Sweden** (+1%).

Foreign seasonal overnights in Finland 2016-2026



Registered overnights spring season 2026

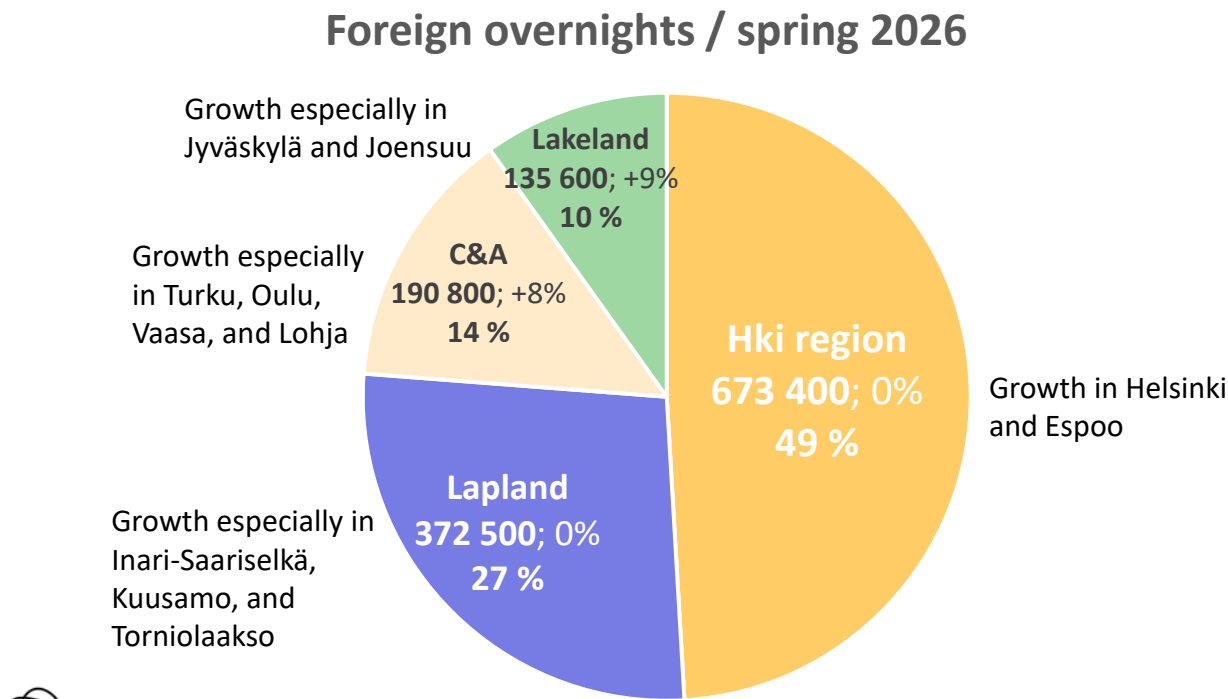
	Mar-May 2026	YoY change-%	Change-% vs. 03-05 2019
Total	4.9M	0%	-3%
Domestic	3.5M	-1%	-3%
Foreign, total	1.4M	+2%	-1%
Foreign excl. Russia	1.4M	+2%	+12%
Scandinavia	198,900	+3%	0%
EU-27 + UK	833,500	+2%	+14%
Asia	205,100	-6%	-9%
America	159,100	+20%	+54%



Overnights in spring season 2026

And change compared to spring 2025

- **Nearly half** of the foreign overnights took place in the **Helsinki region** and **27%** in the **Lapland region**. Overnights remained in both of the regions at the same level than last spring.
- **Coast & archipelago** as well as **Lakeland** regions experienced **growth** from last year.
- **Lakeland** is the only region which has not yet recovered to the pre pandemic level.



	Mar – May 2026	YoY change
Germany	161,000	+6%
Sweden	117,800	+4%
USA	117,600	+19%
UK	82,200	+7%
France	73,700	-7%
Netherlands	64,600	-7%
Italy	51,800	-1%
Norway	43,700	-1%
Spain	40,200	+13%
Estonia	38,800	+2%
China & Hong Kong	38,400	+10%
Japan	35,400	+4%
Switzerland	32,700	0%
Denmark	31,400	+4%
India	30,000	-20%
Poland	27,700	+16%
Belgium	24,800	-16%
Australia	22,300	-6%
Austria	20,300	+9%

Registered foreign overnights decreased by 3% in May

May 2026

409,100 total foreign overnights;
-3% vs. May-2025

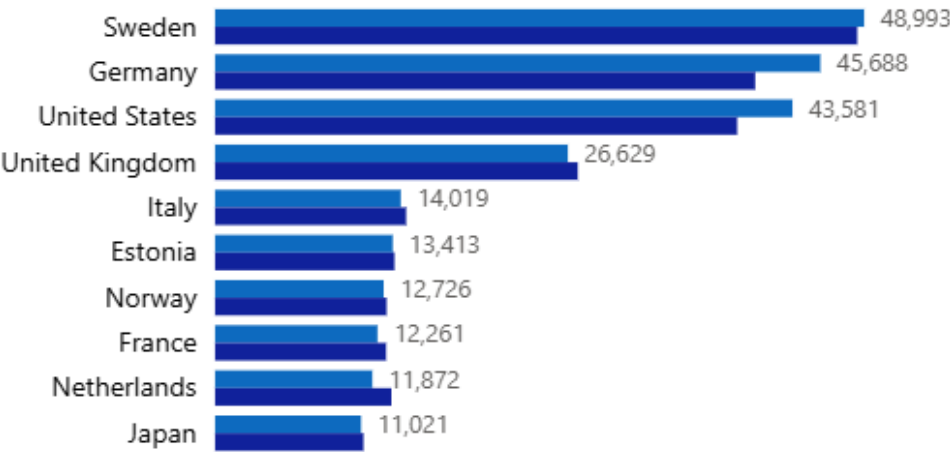
249,100 EU+UK; 0%

74,400 Scandinavia; -2%

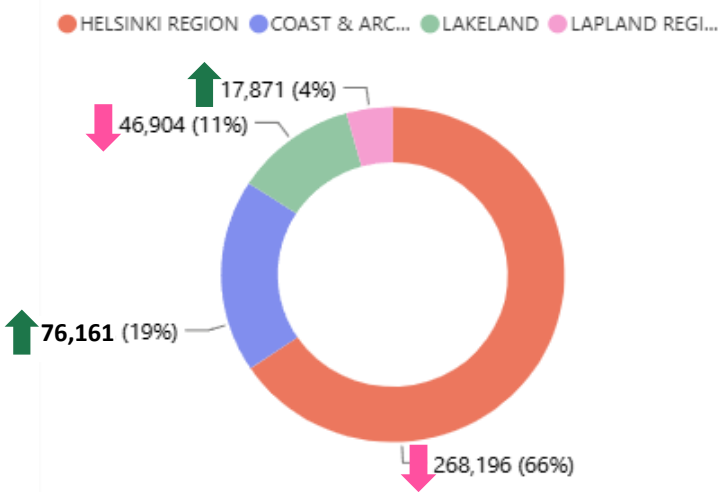
49,200 Asia; -19%

56,200 America; +5%

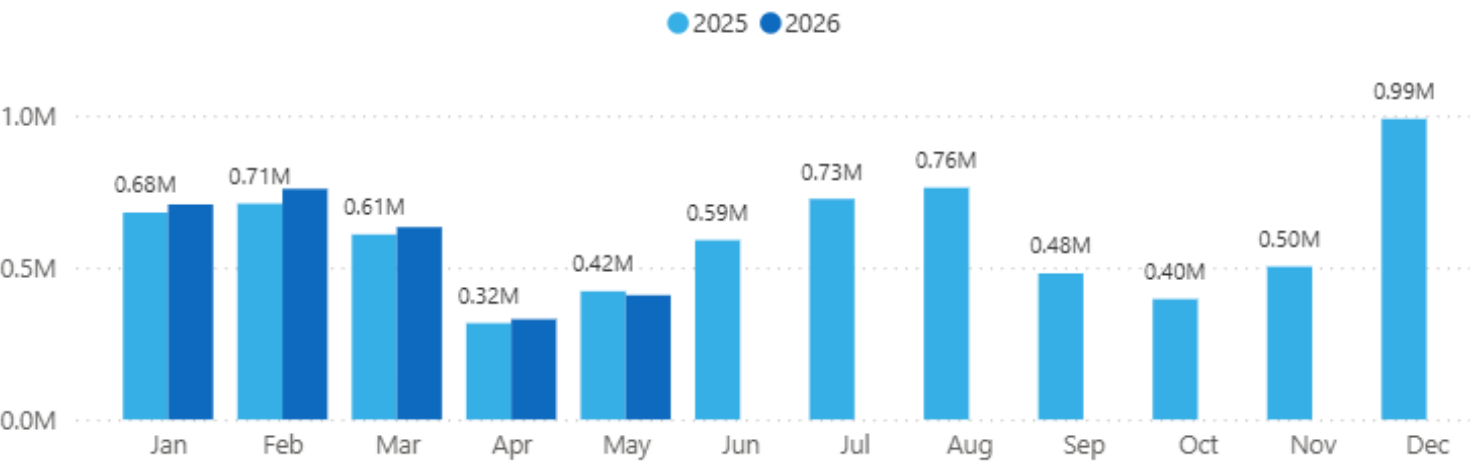
Top10 source markets in May-2026 vs. May-2025



OVERNIGHTS IN MAIN REGIONS YEAR 2026, 202605-202605



FOREIGN OVERNIGHTS



Top10 destinations for total foreign; vs. May-2025

- 223,700 Helsinki; -3%
- 31,300 Vantaa; -16%
- 16,800 Åland; -20%
- 14,100 Turku; -3%
- 13,800 Tampere; -2%
- 13,200 Espoo; -14%
- 8,500 Rovaniemi; +18%
- 7,000 Oulu; +14%
- 5,900 Jyväskylä; +39%
- 5,900 Vaasa; -5%

Registered foreign overnights increased by 4% in April

April 2026

329,200 total foreign overnights;
+4% vs. Apr-2025

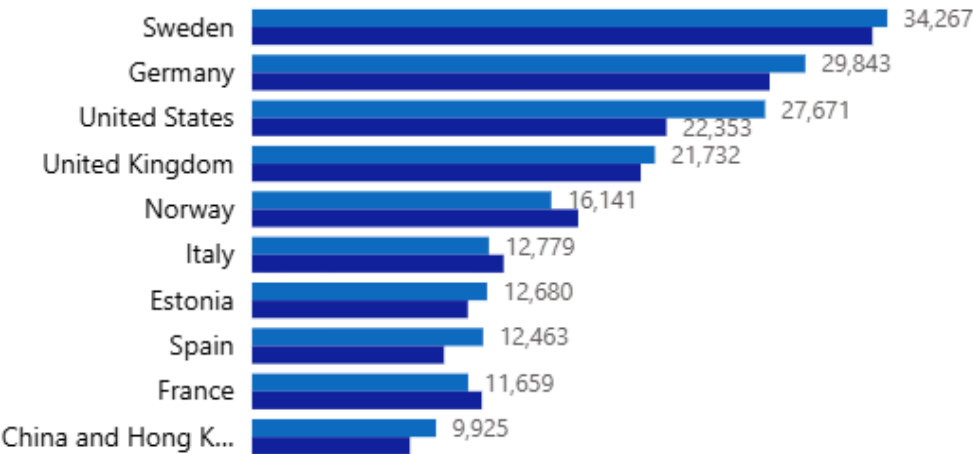
196,400 EU+UK; **+4%**

61,600 Scandinavia; **+2%**

47,300 Asia; **+2%**

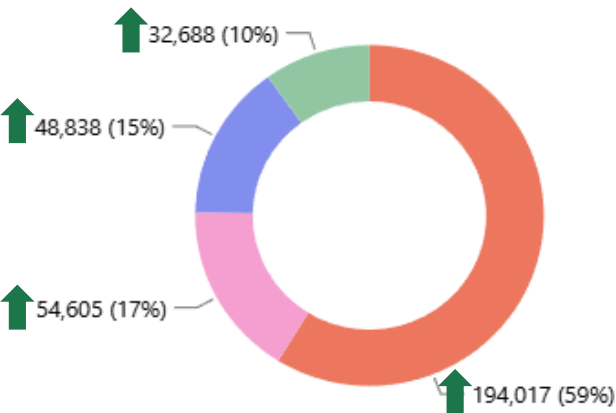
39,000 America; **+30%**

Top10 source markets in Apr-2026 vs. Apr-2025



OVERNIGHTS IN MAIN REGIONS YEAR 2026, 202604-202604

HELSINKI REGION LAPLAND REGION COAST & AR... LAKELAND



Top10 destinations for total foreign; vs. Apr-2025

- **154,100 Helsinki; +2%**
- 26,200 Vantaa; **-12%**
- 16,600 Rovaniemi; 0%
- 13,700 Espoo; +57%
- 13,200 Kittilä-Levi; **-6%**
- 11,400 Turku; 0%
- 10,600 Tampere; +2%
- 7,900 Inari-Saariselkä; +38%
- 5,800 Åland; **-13%**
- 5,500 Jyväskylä; +67%

Registered foreign overnights increased by 4% in March

March 2026

633,000 total foreign overnights;
+4% vs. Mar-2025

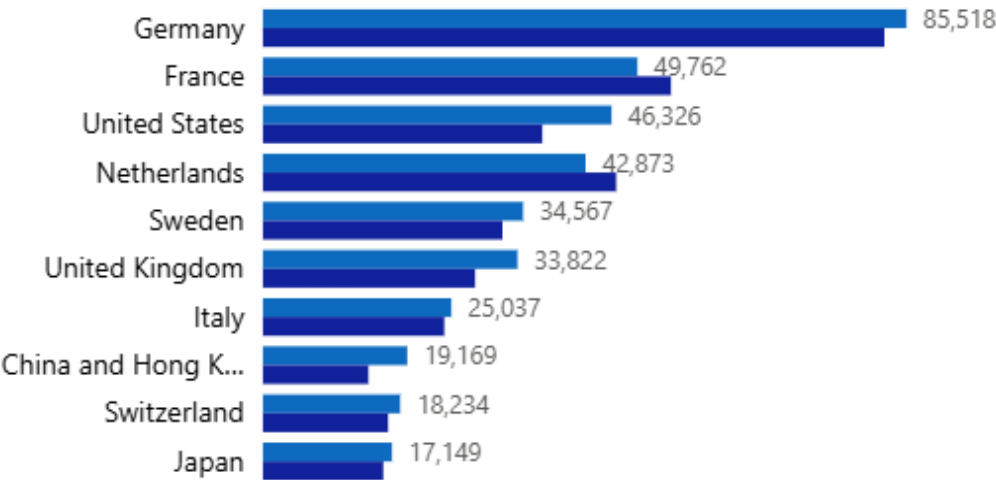
388,000 EU+UK; +3%

62,900 Scandinavia; +10%

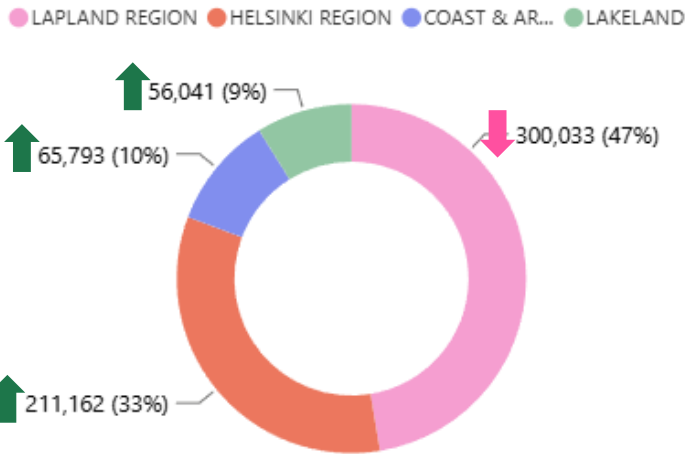
108,600 Asia; -2%

63,900 America; +31%

Top10 source markets in Mar-2026 vs. Mar-2025



OVERNIGHTS IN MAIN REGIONS YEAR 2026, 202603-202603

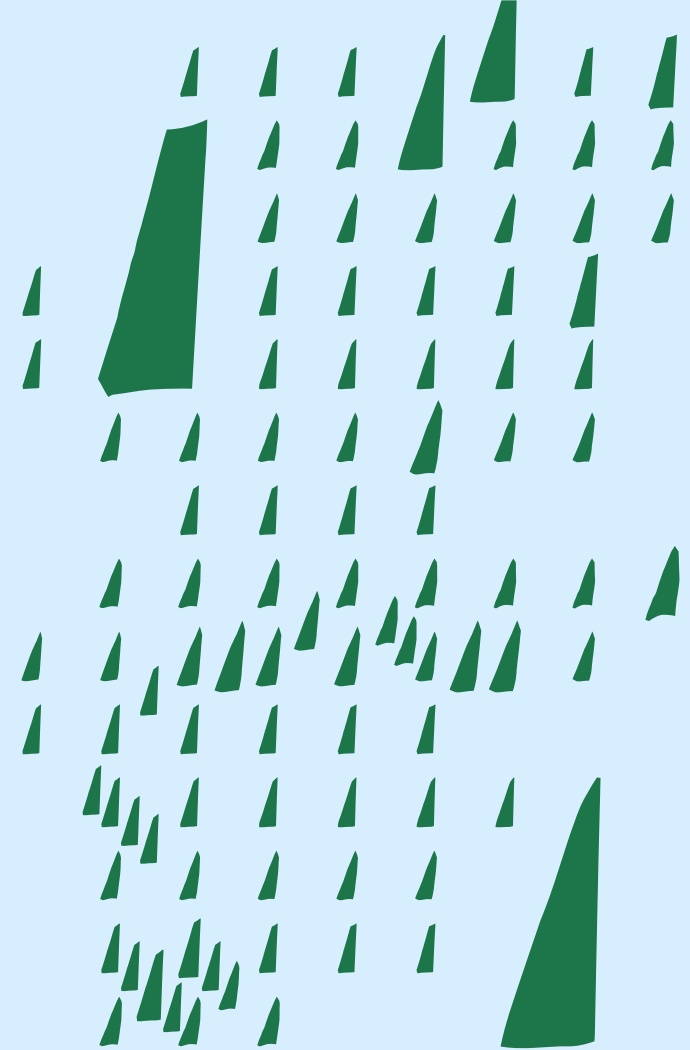


Top10 destinations for total foreign; vs. Mar-2025

- **166,100 Helsinki; +7%**
- 78,100 Rovaniemi; -10%
- 60,000 Inari-Saariselkä; +16%
- 46,300 Kittilä-Levi; -4%
- 34,400 Vantaa; -6%
- 24,000 Kolari-Ylläs; -12%
- 19,900 Ruka-Kuusamo; +43%
- 19,800 Sodankylä; +9%
- 15,000 Turku; +40%
- 13,100 Tampere; +1%

Overnights in short-term rentals

- The importance of **short-term rentals via international platforms** continues to grow.
- In **2025**, **foreign overnights** in short-term rentals added up to **3.2 million**, so the total number of **foreign paid overnights** reached **10.4 million**, which was **15% more** than in 2024 *and 17% more than in 2019*.
- The share of foreign overnights in short-term rentals was **31%** in **2025**. As the biggest growth in short-term rentals in recent years has occurred during the winter months, **January-March 2026** marked again new records in short-term rentals, and the share rose to **36%**.
 - In **2025**, the share of overnights in short-term rentals in **Rovaniemi** was **more than half** of the total number of **paid foreign overnights**. Beside in Rovaniemi, the growth in short-term rentals has increased during the latest years also in **Kittilä-Levi**, **Ruka-Kuusamo** and **Kolari-Ylläs** in the Lapland region.
 - Among the main source markets the **Spanish**, **Polish**, **Irish**, **Estonian**, and **French** travellers are most actively choosing short-term rentals for their accommodation in Finland.

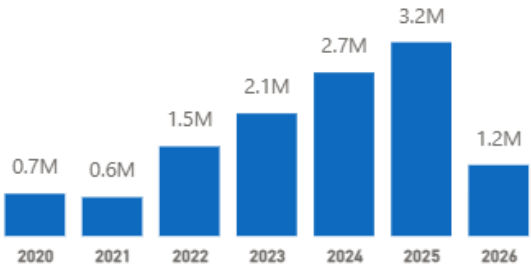


Foreign overnights in short-term rentals

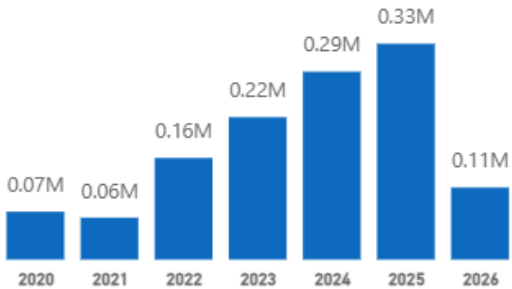
2025	NIGHTS SPENT			STAYS RESERVED			AVERAGE LENGTH OF STAY, NIGHTS (highest selected year & month: 2025 12)			AVERAGE PERSONS IN GROUP (highest selected year & month: 2025 12)		
	TOTAL	FOREIGN	DOMESTIC	TOTAL	FOREIGN	DOMESTIC	TOTAL	FOREIGN	DOMESTIC	TOTAL	FOREIGN	DOMESTIC
	6.34M	3.25M	3.09M	880.75K	329.72K	551.03K	3.0	3.4	2.3	3.1	3.3	2.7

Total	Foreign	Domestic
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OVERNIGHTS - 5 years
Selected: Foreign



STAYS RESERVED - 5 years
Selected: Foreign

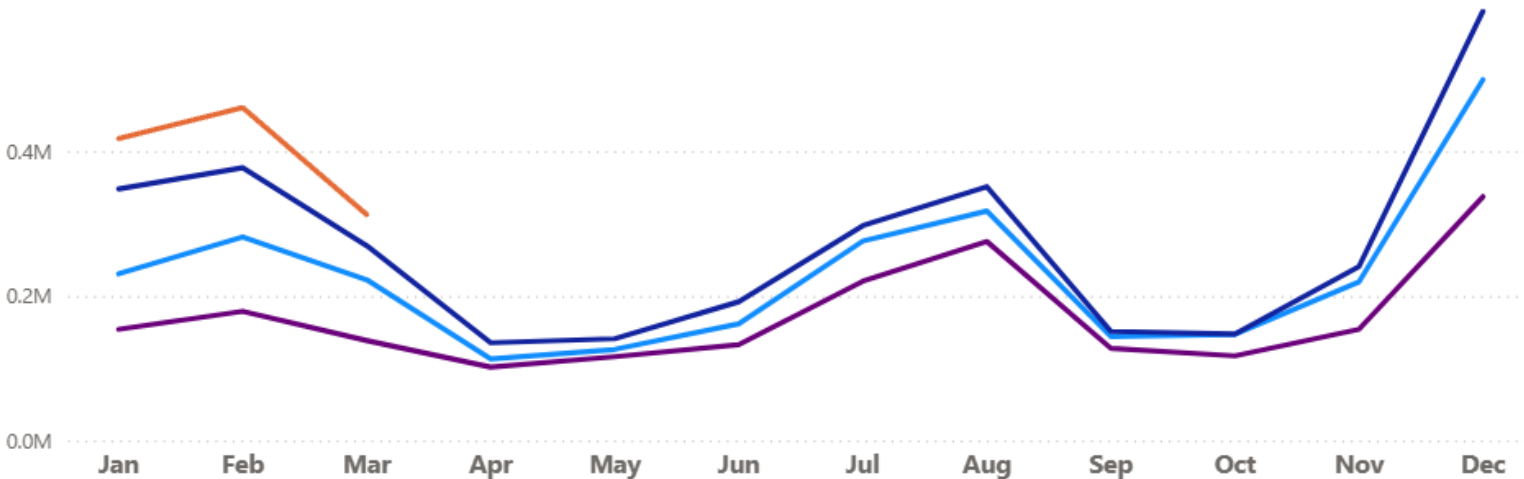


[View Foreign & Domestic comparison](#)

OVERNIGHTS

Selected: Foreign

● 2023 ● 2024 ● 2025 ● 2026



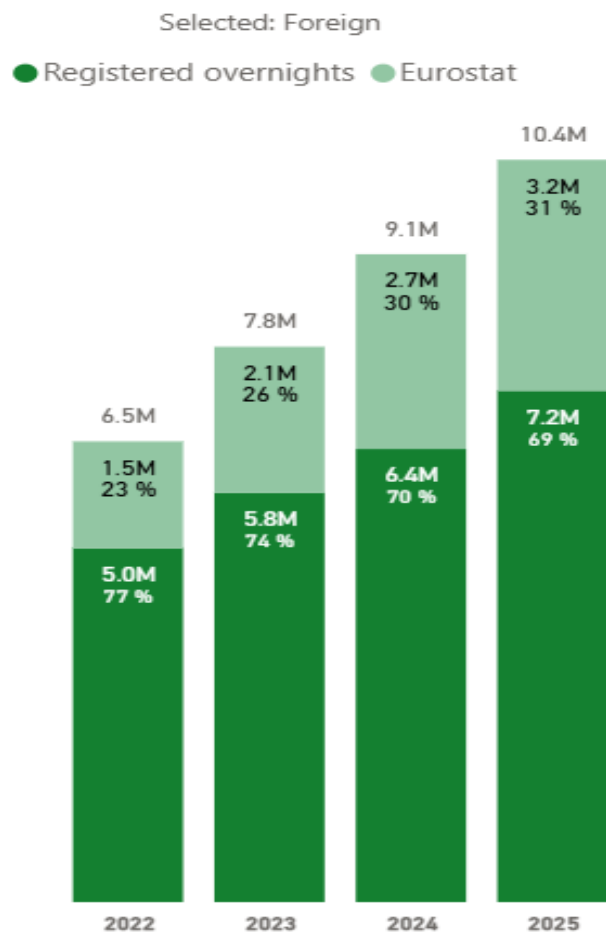
The use of short-term rentals has steadily increased. Growth has been strongest among the foreign visitors especially during the winter months in Lapland.

Monthly foreign total paid overnights in Finland

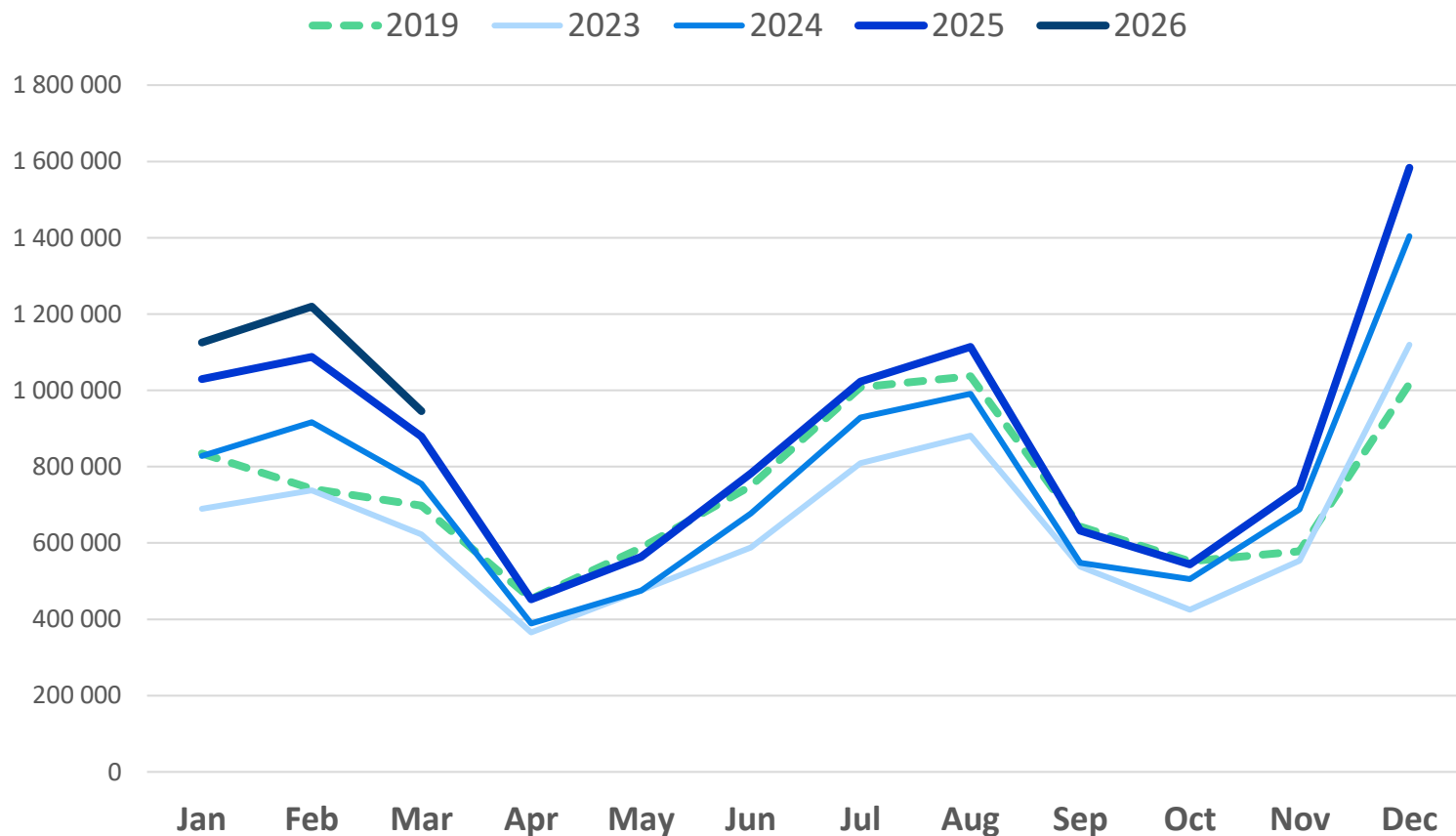
(Registered overnights + overnights in short-term rentals)

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

The growing popularity of short-term rentals among foreign visitors highlights the noticeable recovery and strong growth of winter travel. Summer travel has also seen an uptick, as foreign total paid overnights in summer 2025 surpassed 2019 level by 4%.



Foreign total paid (registered & short-term rentals) overnights in Finland



Registered and short-term rentals overnights in Finland Year 2025

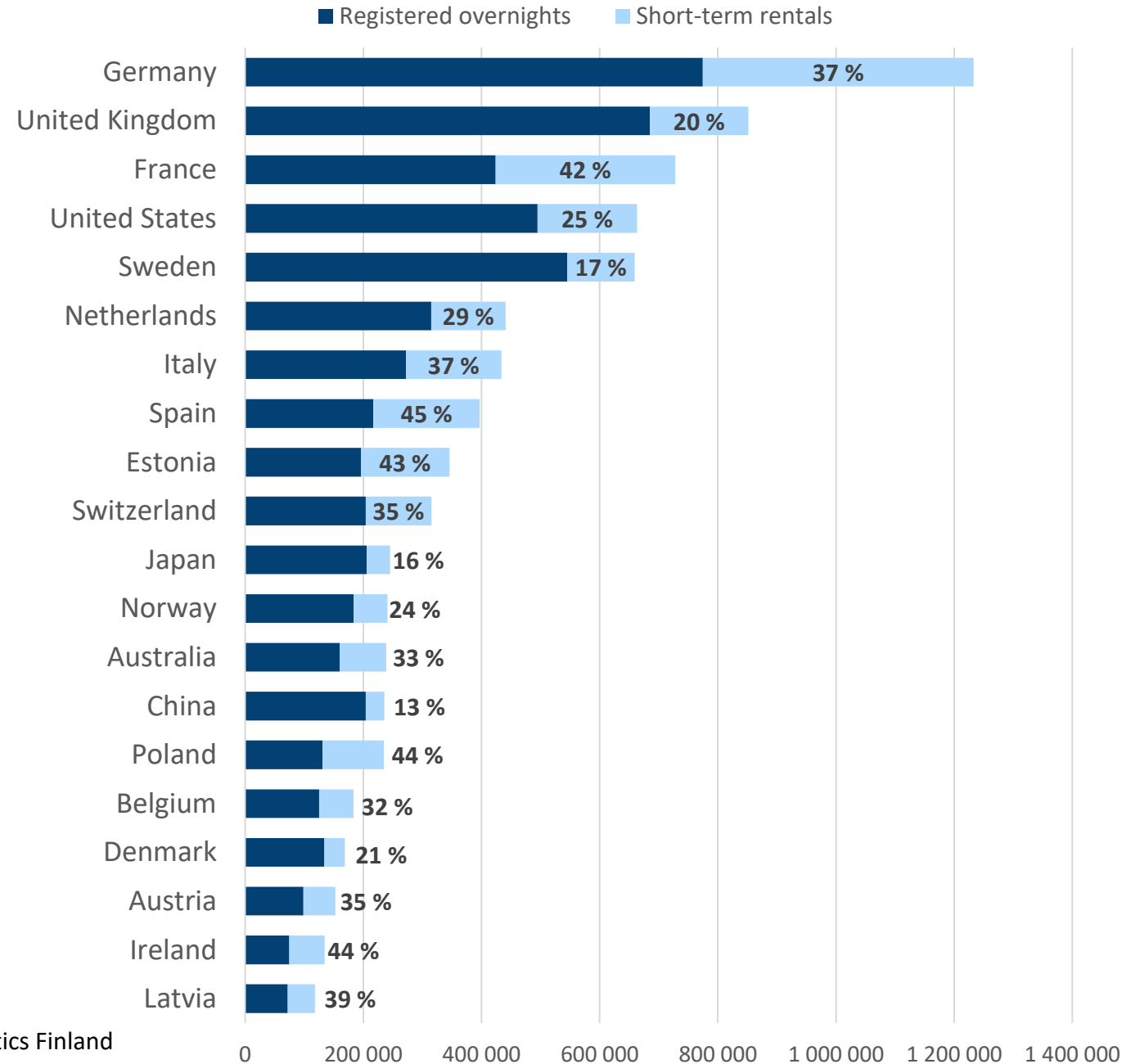
In 2025, **Germany** was the dominant market for both registered and short-term rental overnights. Germany's share of short-term rentals has also constantly increased over the latest years.

In addition to Germany, **Finland** saw overnights in short-term rentals of **30% or more** for visitors coming from **France, Italy, Spain, Estonia, Switzerland, Australia, Poland, Belgium, and Austria**.

When looking at the **total paid overnights** (registered plus short-term rentals) in 2025 versus pre-pandemic levels in 2019, **the highest relative increases** among the main source markets were recorded for **Ireland (+190%)**, **Italy (+89%)**, **Australia (+80%)**, **Poland (+78%)**, **the US (+63%)**, **Austria (+61%)**, **France (+58%)**, **Spain (+58%)**, and **Belgium (+56%)**.

[Short-term rentals report](#)

Registered and short-term rentals overnights in Finland - 2025



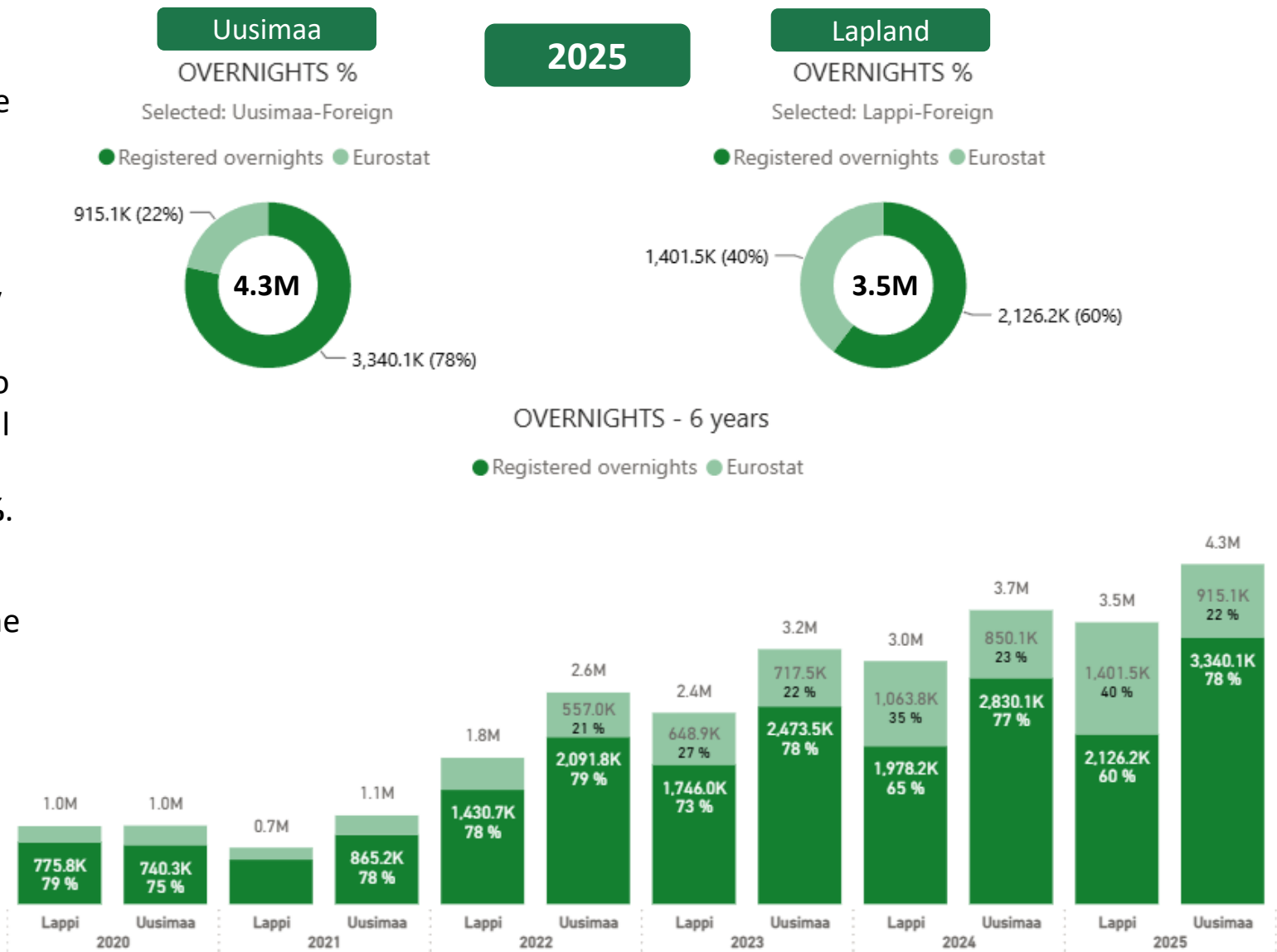
Foreign paid overnights in Uusimaa & Lapland

Uusimaa and **Lapland** dominate the amount of foreign paid overnights in Finland. In 2025, these **two counties** counted for nearly **7.8 million foreign paid overnights**, which meant a **75% share** of the total.

The popularity of short-term rentals has notably increased in **Lapland**, where the proportion of short-term rentals has risen from 27% in 2023 to **40% in 2025**. In **Rovaniemi**, more than half of all paid foreign overnight stays occurred in **short-term rentals**, and in **Levi** the share was also **45%**.

The **annual growth rate** for overnight stays in **short-term rentals** in **Lapland** was **32%**, the same as in **Rovaniemi**. Beside Rovaniemi, short-term rentals grew also in other destinations in Lapland; **Ylläs** by 32% and **Levi** by 31%.

In **Uusimaa**, the share of short-term rentals has remained steady with **around 20% share**.



Registered and short-term rentals overnights in other regions in Finland in 2025

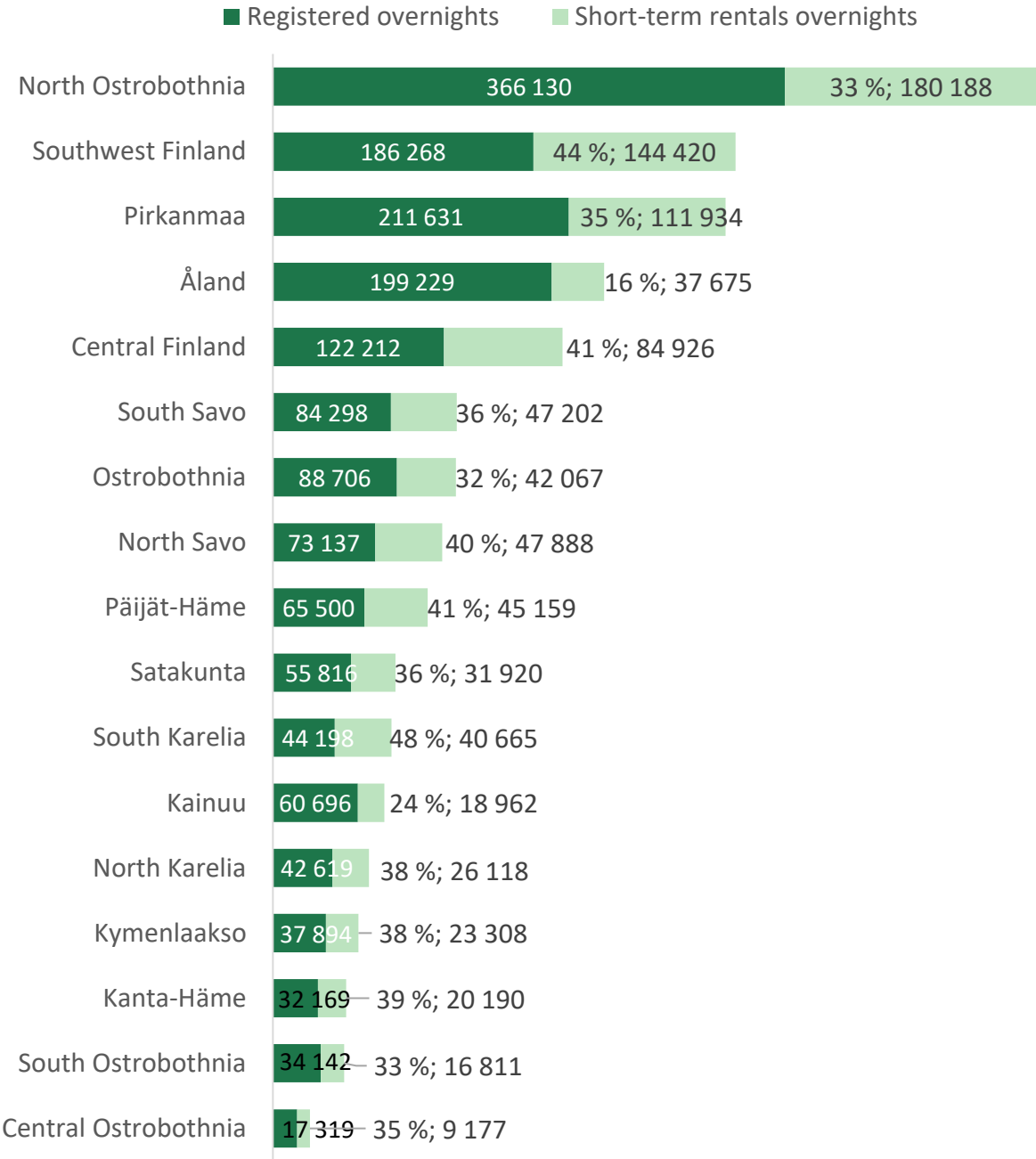
Beside Lapland, the proportion of short-term rentals within the total paid foreign overnight stays has steadily increased in North Ostrobothnia, Pirkanmaa, Åland, Satakunta, North Karelia, and Central Ostrobothnia.

Apart from Lapland, the most substantial year-over-year increase in short-term rentals was observed in Kymenlaakso, Central Ostrobothnia, and South Karelia.

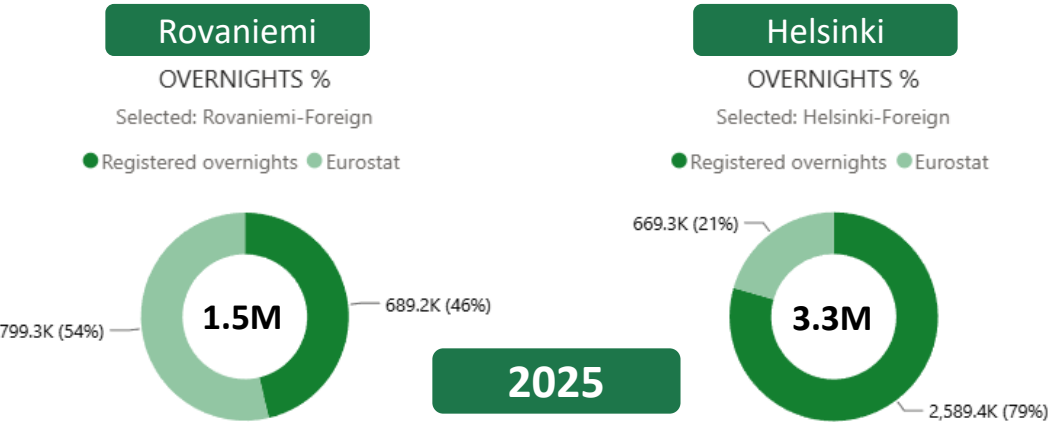
Biggest shares of short-term rentals were in South Karelia (48%) and Southwest Finland (44%), while the smallest shares were in Åland (16%) and Kainuu (24%).

The largest relative year-over-year growths in total paid foreign overnights were recorded in Kymenlaakso (+43%), Kanta-Häme (+42%), South Karelia (+40%), North Savo (+28%), and Central Finland (+21%).

Foreign overnights in other Finnish counties - Year 2025



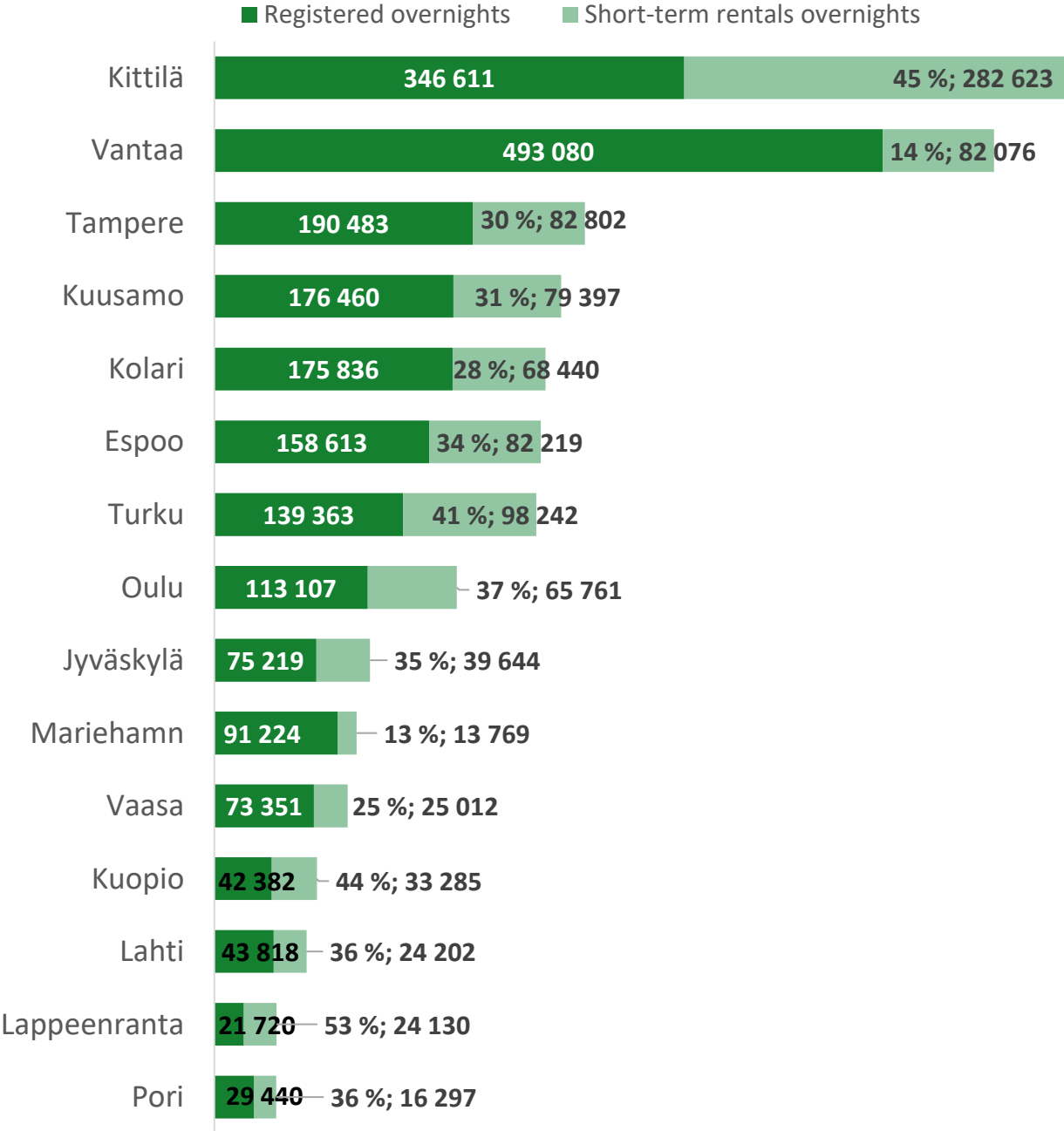
Registered and short-term rentals overnights in Finnish municipalities in 2025



In addition to Rovaniemi, the most significant year-on-year increases in **short term rentals** were observed in **Lappeenranta, Kokkola, Vaasa, Kolari-Ylläs, and Kittilä-Levi**.

The highest relative year-on-year growth in **total paid foreign overnights** occurred in **Kouvola, Lappeenranta, Kuopio, Vaasa, and Mikkeli**.

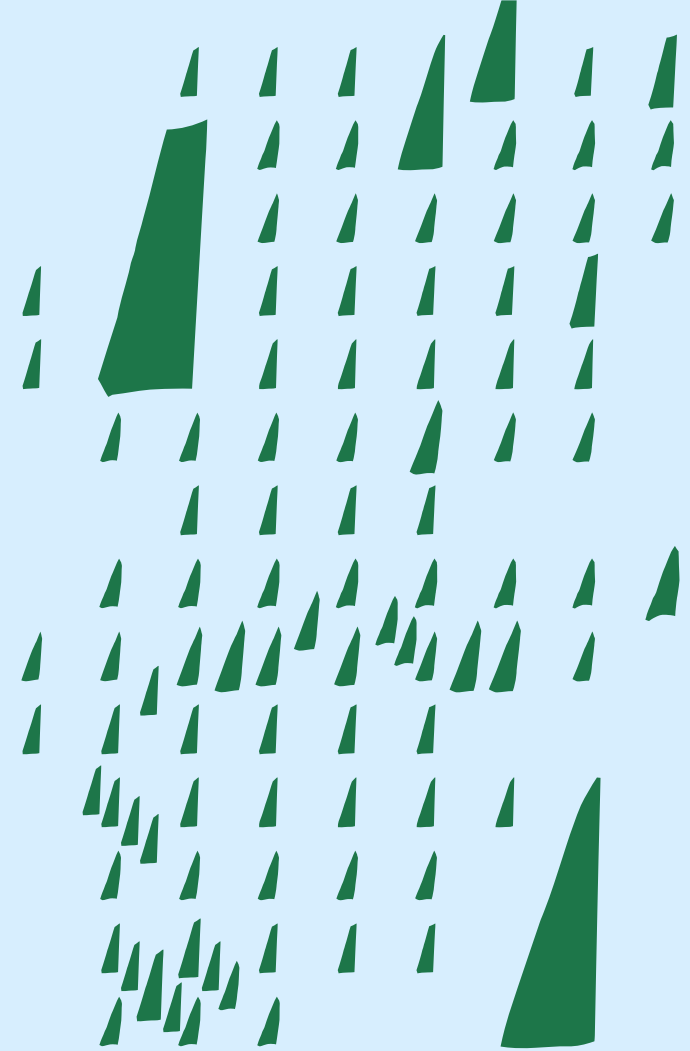
Foreign overnights in some other Finnish municipalities - 2025



Registered Overnight Stays in the Nordics

Jan-May 2026

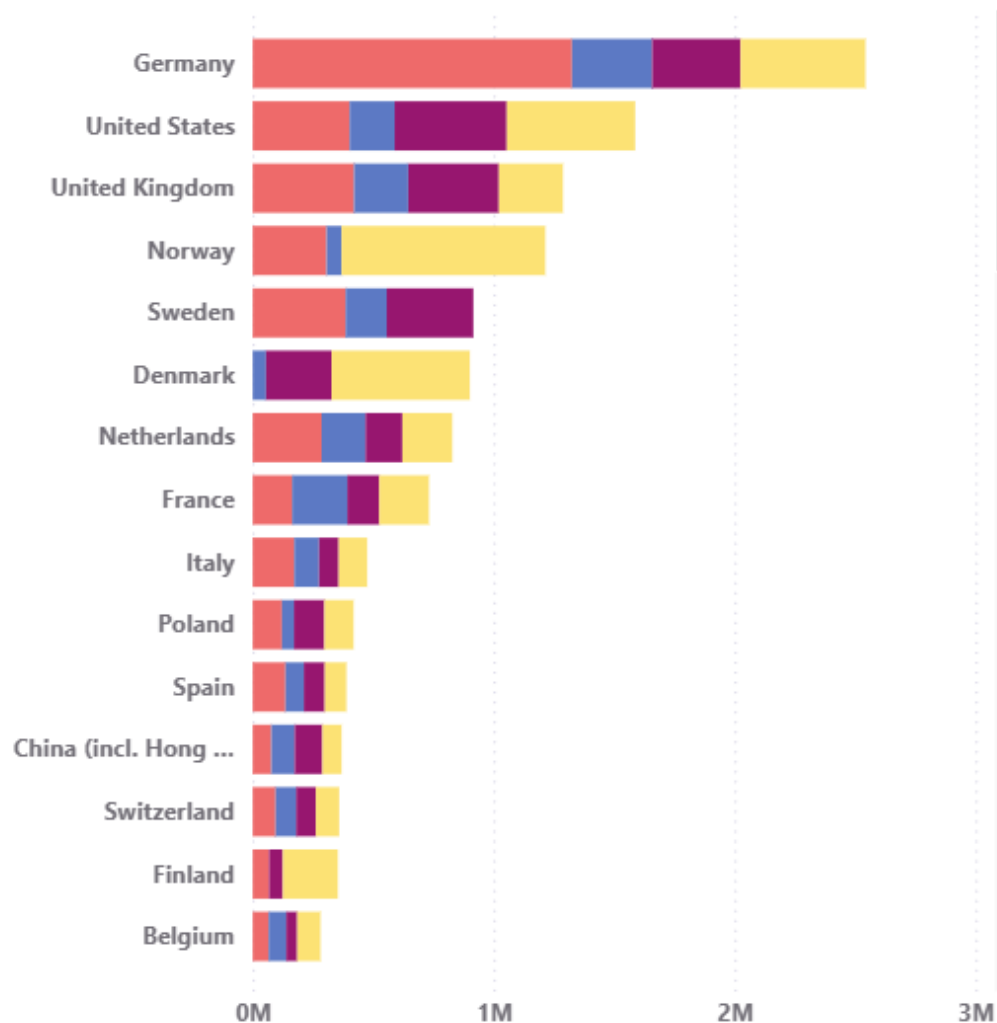
- Foreign registered overnight stays continued to **grow** across the Nordics.
- **Denmark** posted the largest absolute and relative increase, while **Finland** recorded the lowest growth.
- Market shares remained the same as the same period last year: **Denmark** remained largest at **31%**, **Sweden** was at **29%**, **Norway** at **21%**, and Finland held **18%** share.
- **Germany** was the leading source market, followed by **the US** and **the UK**.
- Growth was broad-based, with increases to each of the four Nordic country from key markets including **Germany, the US, the UK, Norway, Sweden, Spain, and China**.



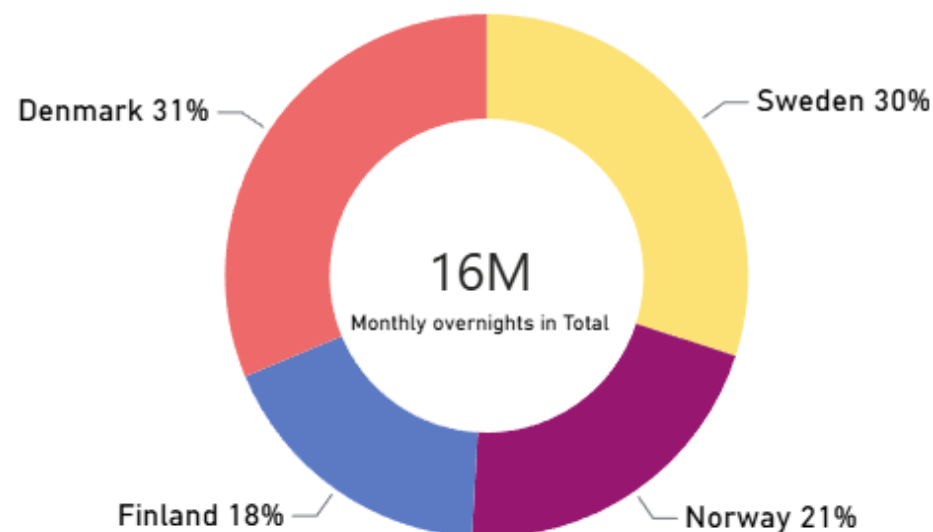
Foreign overnights in the Nordics (excl. Iceland) Jan-May 2026

Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2026-31.5.2026

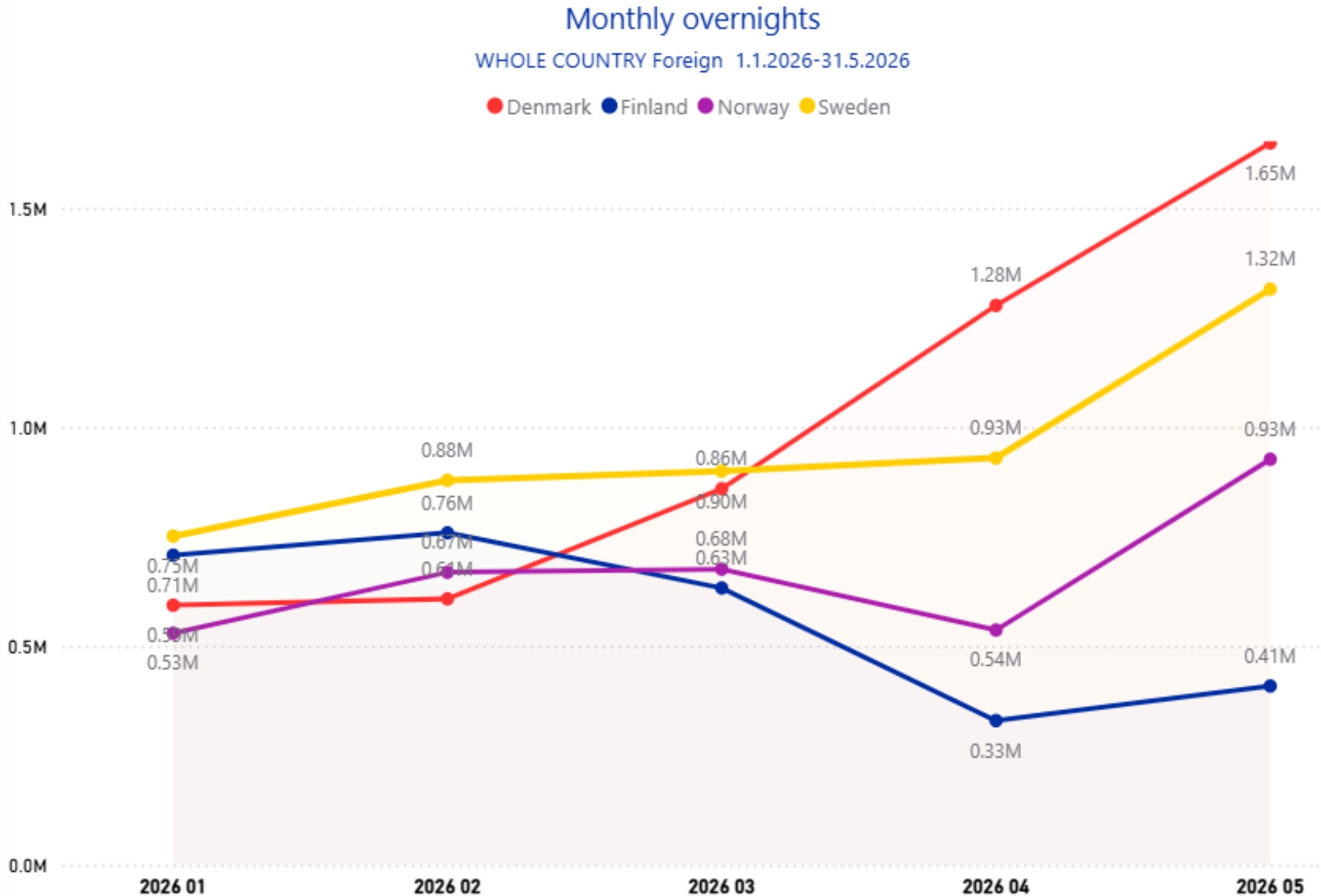
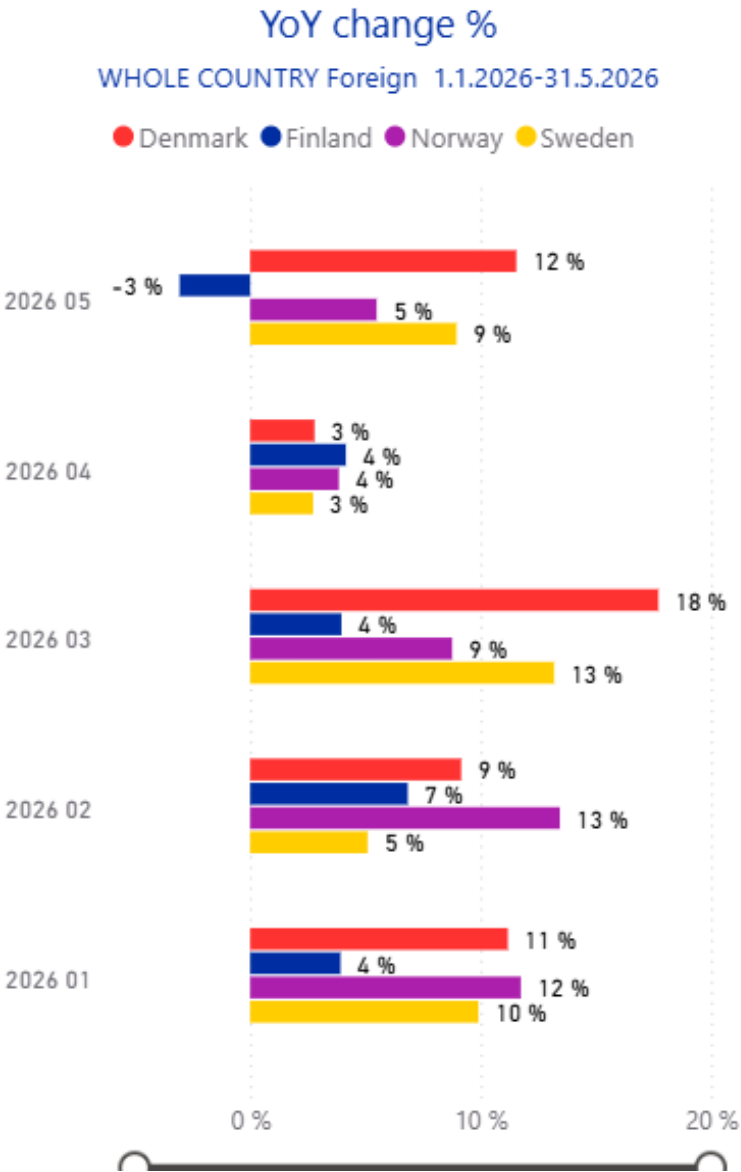


WHOLE COUNTRY Foreign 1.1.2026-31.5.2026



Nordics	Monthly	YoY change %
Denmark	4,989,120	10 %
Sweden	4,775,811	8 %
Norway	3,338,395	8 %
Finland	2,839,149	4 %
Total	15,942,475	8 %

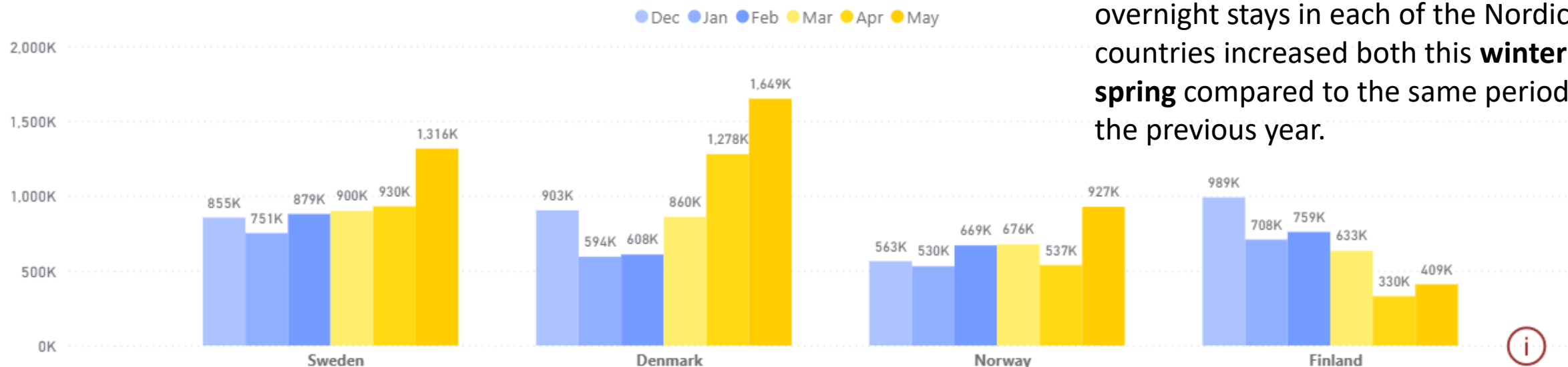
Monthly overnights in the Nordics (excl. Iceland) Jan-May 2026



Seasonality of overnights in the Nordics (excl. Iceland)

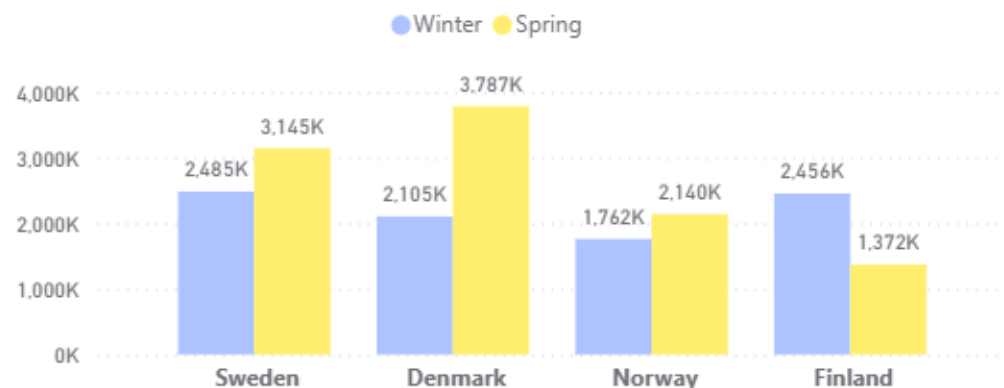
Monthly nights spent in the Nordic countries

1.12.2025-31.5.2026



The number of registered foreign overnight stays in each of the Nordic countries increased both this **winter** and **spring** compared to the same periods in the previous year.

WHOLE COUNTRY Foreign 1.12.2025-31.5.2026



WHOLE COUNTRY Foreign 1.12.2025-31.5.2026

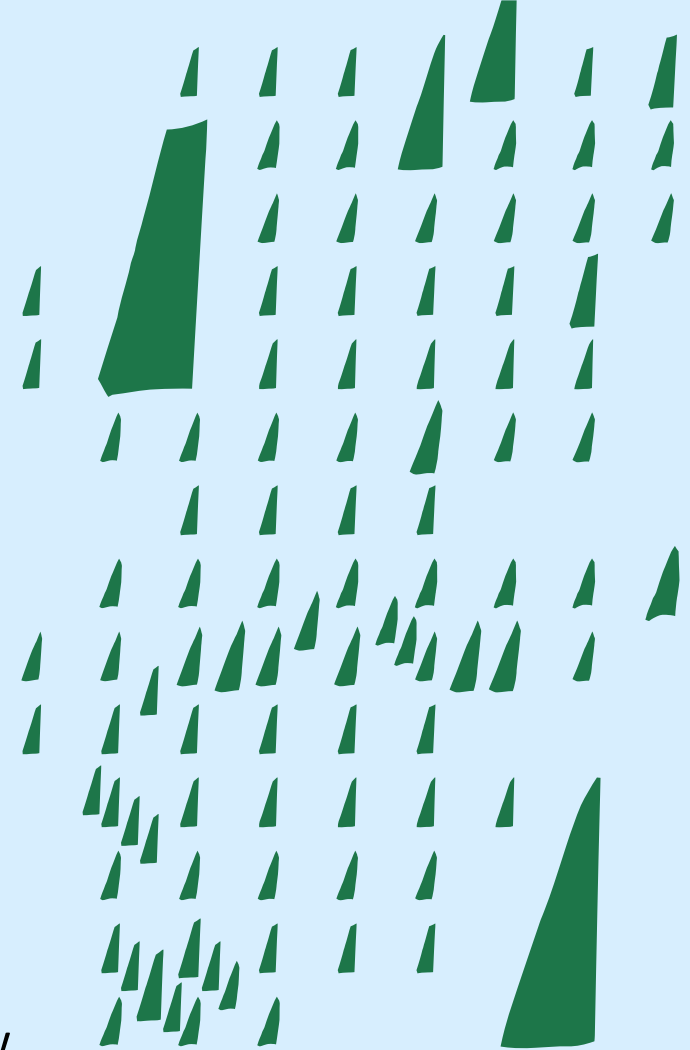
Season	Winter		Spring		Summer		Autumn	
	Overnights	YoY change %	Overnights	YoY change %	Overnights	YoY change %	Overnights	YoY change %
Nordics								
Sweden	2,485,333	11 %	3,145,419	8 %	-100 %	-100 %	-100 %	-100 %
Denmark	2,104,937	12 %	3,787,339	10 %	-100 %	-100 %	-100 %	-100 %
Norway	1,761,558	11 %	2,139,956	6 %	-100 %	-100 %	-100 %	-100 %
Finland	2,456,243	7 %	1,372,309	2 %	-100 %	-100 %	-100 %	-100 %
Total	8,808,071	10 %	10,445,023	7 %	-100 %	-100 %	-100 %	-100 %

- **Sweden** and **Finland** had the biggest shares of **28%** in **winter 2026**, but overnights increased more in Sweden than in Finland compared to the previous winter.
- In **spring 2026**, Finland's market share was the lowest at 13%.

International Flight Seat Capacity

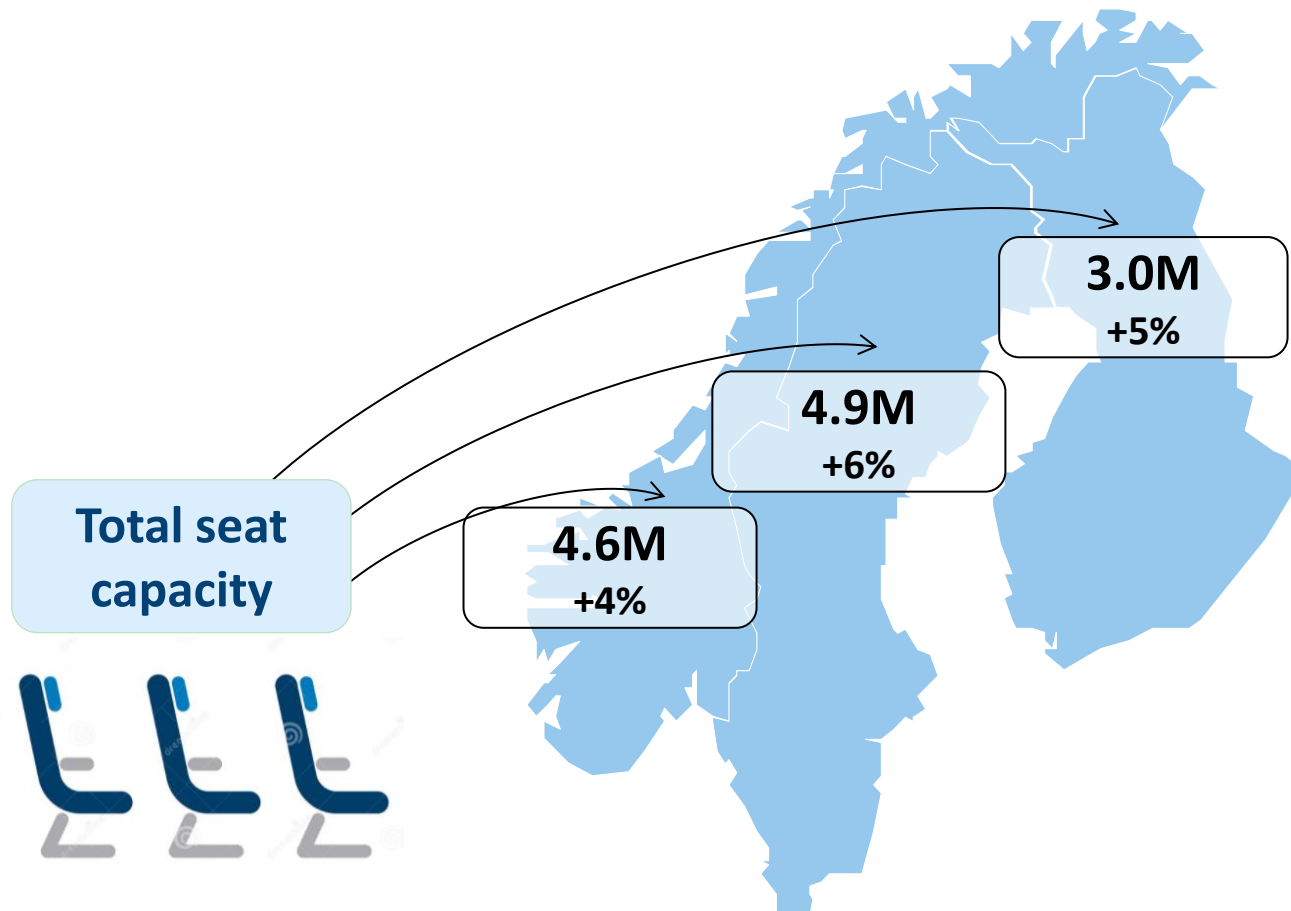
June – August 2026

- Finland's international seat capacity for summer 2026 is projected to **increase by 5%** compared with last summer.
 - Growth is led by **China: Juneyao Air** has daily flights from Shanghai to Helsinki from the end of June, and **China Southern Airlines** will operate 3-7 flights a week from Beijing Daxing airport to Helsinki.
 - Capacity on some routes will decline, including Finnair's **London Heathrow–Helsinki** service, Air France's **Paris CDG–Helsinki** service, and Finnair's **Dallas, Los Angeles** and **Seattle** services.
 - **Direct flights to Helsinki** will represent **96%** of Finland's total seat capacity.
- International seat capacity to **Sweden** and **Norway** is also expected to grow by **6% and 4%** respectively compared with last summer.



Total Seat capacity to FI, SE & NO for summer (Jun-Aug) **2026**

Comparison to previous summer



Database update 05-July

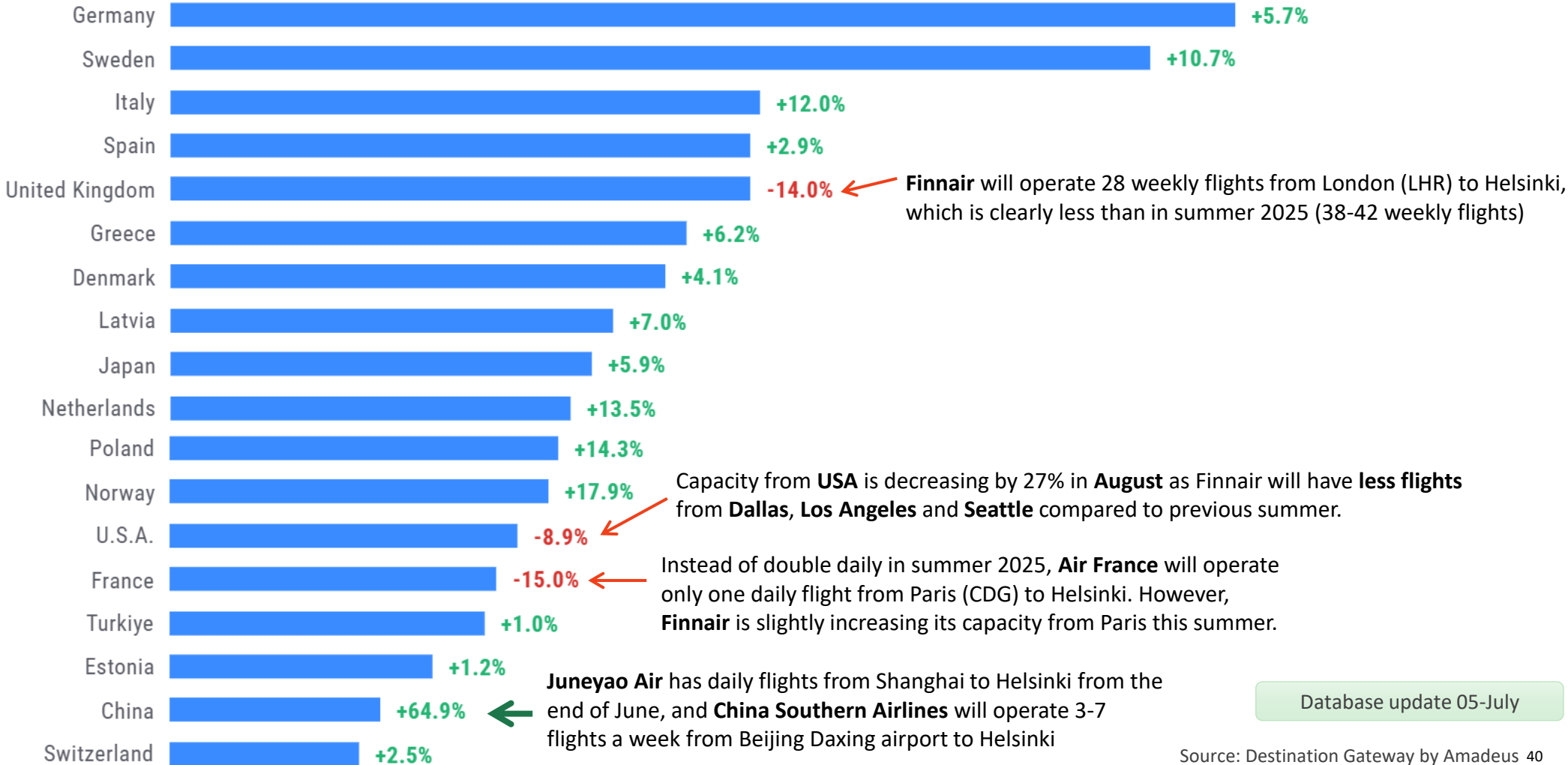
Int'l seat capacity to Finland for Jun-Aug 2026

Comparison to previous summer

New countries
connected to Finland
in summer 2026:

- **Canada**
Toronto to HEL,
AY 3 times a week
- **Albania**
Tirana to HEL,
AY twice a week
Norwegian twice a
week
- **Luxembourg**
to HEL,
AY 2-3 times a week
Luxair twice a week

43 countries connected

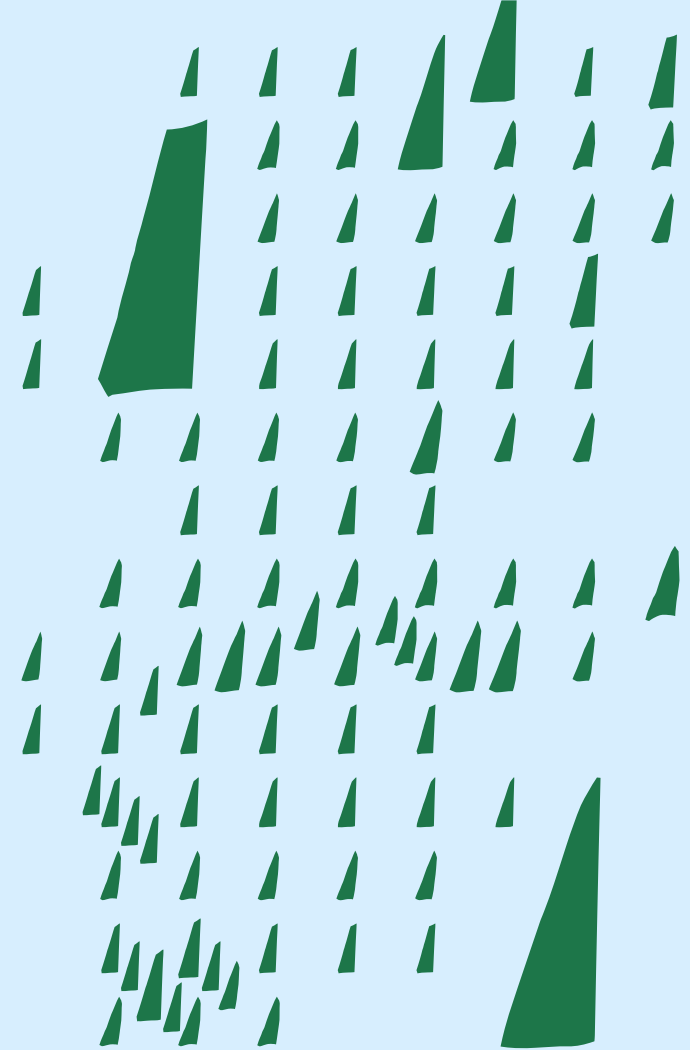


Jun-Aug 2026
Total seat capacity to whole
Finland 3.0M; +5%
Seat capacity to **Helsinki**
2.8M; +5% (96% of total)

Forecast for Flight Arrivals

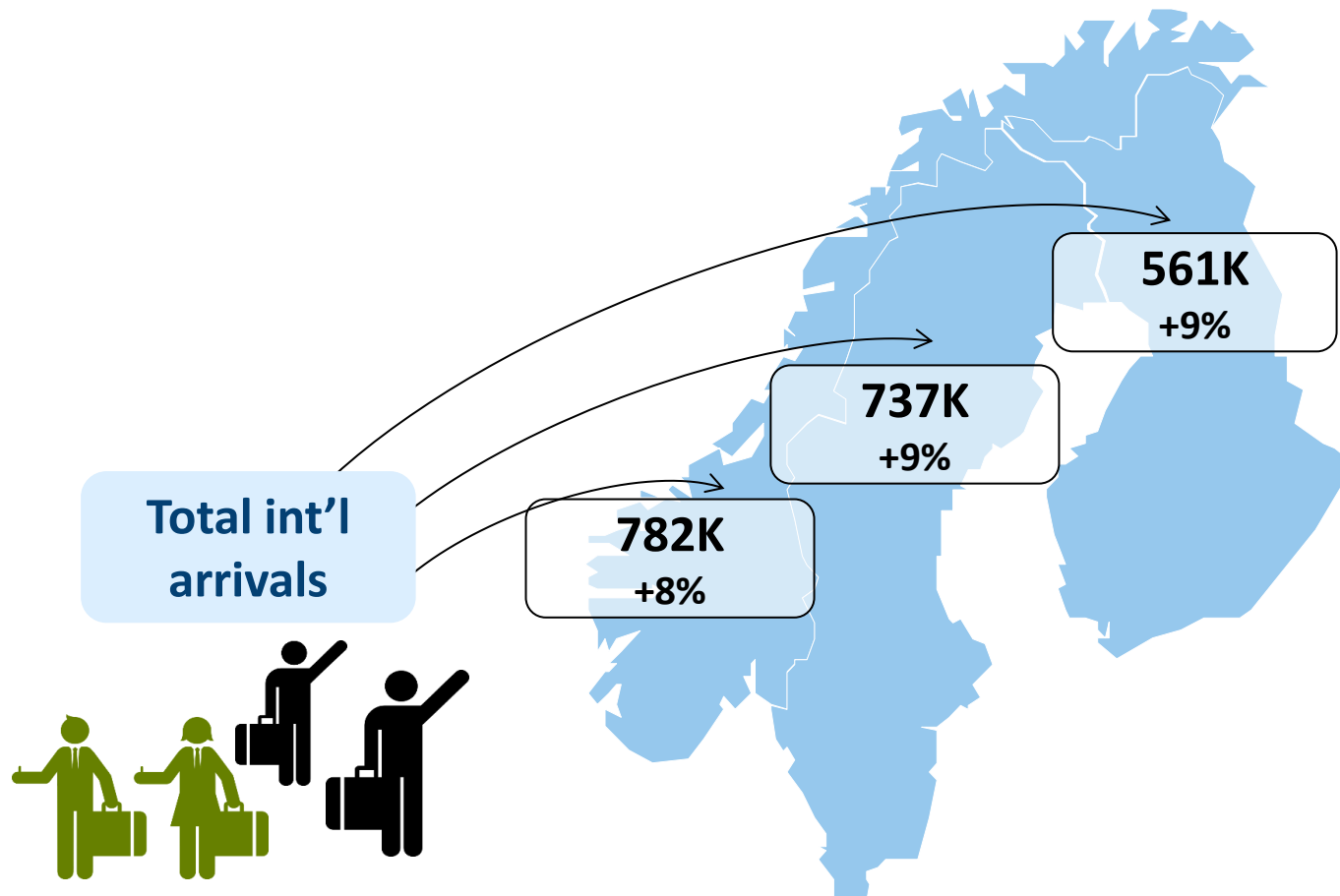
June – August 2026

- International flight arrivals to **Finland** are forecast to **increase by 9%** in summer 2026 compared with last summer.
 - Key source markets are **the US, Japan, Germany, Sweden and China**.
 - **Helsinki-Vantaa** will receive the majority of international arrivals, accounting for **96%** of the summer total. Some of the travellers will stay in the capital region and some will continue by train or by car to other parts of Finland.
- Arrivals to **Sweden** and **Norway** are also expected to increase **by 9% and 8%** respectively compared with last summer.
 - For both Sweden and Norway, the top three source markets are **the US, Germany and the UK**.



Forecast of total int'l arrivals* to FI, SE & NO summer (Jun-Aug) 2026

Comparison to previous summer



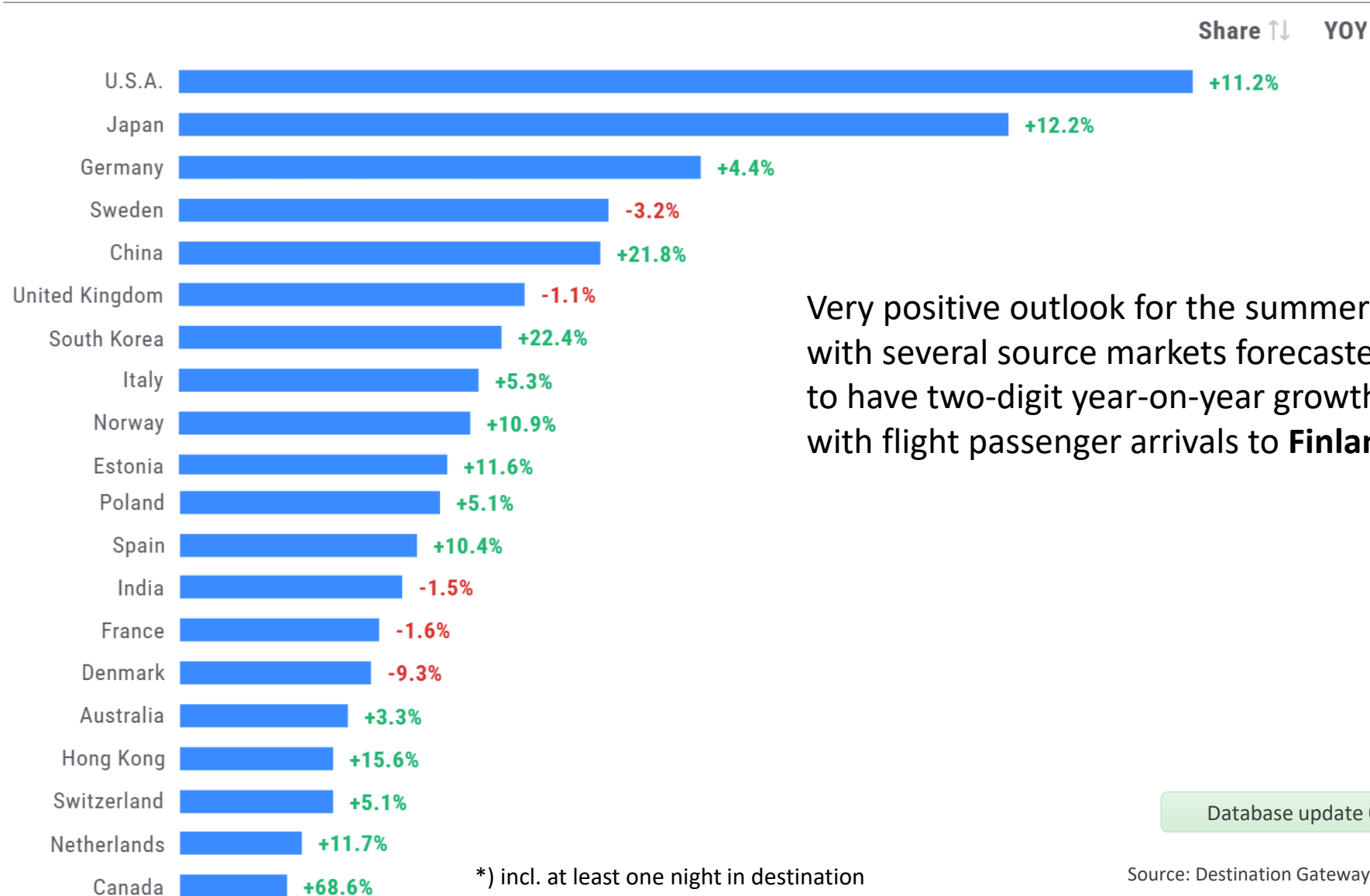
Database update 05-July

Forecast on flight passenger arrivals* in Finland in Jun-Aug 2026

Comparison to previous summer

561,195 tourist arrivals

+8.5% YOY



Database update 05-July

