Visit Finland

VF monthly follow-up

November & autumn season 2025

Summary

Travel to Finland and to the Nordics

- **Border survey – leisure up, business down:** In the latest Dec 2024–Nov 2025 period, foreign travellers made **5.0 million** trips to Finland (**+4%** YoY) with total spending of **€3.5 billion** (-3% YoY). **Leisure travel** dominates: **76%** of all trips were for leisure/personal purposes. Leisure visitation grew **+8%** in trip volume and visitors' spending rose **+4%** YoY. In contrast, **business travel** accounted for 24% of trips and **declined** (trips –7% YoY), with business traveler spending dropping sharply (–20% YoY).
  - **Top Markets & Travel Habits:** Neighboring markets remain crucial. The **Border Survey** shows **Estonia, Germany, Sweden, UK,** and **France/USA** as the top source countries for leisure visitors. On average, **90%** of foreign visits included an overnight stay in Finland (10% were same-day trips). Travelers booked their trips about **2.7 months** in advance on average (slightly longer lead time than the previous 12-month period). The median length of stay was **4 nights** (unchanged), and only 7% of visitors came on package tours (a small decrease, indicating most travel was independent).
- **Seasonality:** Tourism demand rose strongly from winter to summer 2025, driven by leisure travel. **Winter 2024-2025** saw the biggest surge in both leisure visits and spending, contributing substantially to the annual gains. By **autumn 2025**, total trips dipped slightly (–3% YoY) as leisure travel saw a minor drop (–4% YoY after strong summer) and business travel remained weak. Overall, the seasonal trend shows **winter and summer** now performing much better than a year ago, while **autumn** leveled off after the strong growth earlier in the year.

Summary

Travel to Finland and to the Nordics

- **Foreign registered overnights nearing full recovery:** In Jan–Nov 2025 **6.2 million** foreign overnight stays (**+13%** YoY) were recorded in Finland, just **2% below** 2019 (ex-Russia, **+11% above** 2019).
- **Autumn 2025** - **Regional Trends in Foreign Overnights:** Foreign overnight stays grew across all key regions in autumn 2025 compared to the previous year, though recovery to 2019 levels varies by area. Major regional highlights for **September–November 2025** include:
  - **Helsinki Capital Region:** This region captured **56%** of all foreign overnight stays in autumn. Foreign overnights in Helsinki area **rose 15%** year-on-year, coming in **slightly above** autumn 2019 levels (+1%). The **United States** was the biggest source market in Helsinki's autumn mix (US nights up +8% YoY), alongside strong volumes from Germany, UK, and Sweden.
  - **Lapland:** Lapland accounted for **21%** of Finland's foreign overnights in autumn, benefiting from winter tourism demand. Autumn foreign nights in Lapland were **up 6%** YoY and an impressive **+61% vs autumn 2019**. Key destinations in Lapland saw continued growth: **Rovaniemi** (+6% YoY), **Inari–Saariselkä** (+7%), and **Kittilä–Levi** (+22%) were the top autumn destinations. The **UK** and **Germany** are major visitor sources in Lapland (UK up +7% YoY; Germany saw a slight –2% dip).
  - **Coast & Archipelago:** Finland's coastal and archipelago areas saw **foreign overnights inch up by +1%** in autumn 2025 vs previous year. However, this region remains **–35% below autumn 2019** levels, indicating a slower recovery for autumn season. Among coastal destinations, **Åland** islands posted a +9% YoY increase and **Turku** was up +5%, while **Oulu** saw a 10% drop. The main source market on the coast was **Sweden** (+4% YoY), given its proximity and good connections.

Summary

Travel to Finland and to the Nordics

- **Lakeland:** The Finnish Lakeland region enjoyed a **+19%** surge in foreign overnight stays in autumn 2025 (the highest growth of any region). Despite this robust YoY growth, Lakeland's foreign nights are still about **–31% below** autumn 2019's level. Top Lakeland destinations are showing positive trends: e.g., **Tampere** (+8% YoY), **Jyväskylä** (+2%), and **Lahti** (+38%) all saw increases in autumn. The largest foreign visitor group in Lakeland was from **Germany** (German overnights +18% YoY), reflecting a strong interest in Finland's lakes and countryside among German travelers.

- **Rising Demand for Short-Term Rentals:** International visitors are increasingly using short-term rental platforms when staying in Finland. In **Jan–Sep 2025**, foreign overnight stays in short-term rentals reached **2.6 million** nights, accounting for roughly **33%** of **all paid foreign overnights** in Finland (i.e., one-third of all non-free, commercial foreign stays).

- **Seasonal Pattern for Short-Term Rentals:** The short-term rental segment is particularly significant in the winter months. In **winter 2024-2025**, about **39%** of all foreign paid overnights were in short-term rentals. This share was slightly lower in spring (32%) and summer (29%) of 2025, but still high. The growth rates of this sector are striking – e.g., foreign short-term rental nights were up **+73%** YoY in winter 2025, far outpacing the growth in traditional registered accommodations (+13% in the same period). Even in summer, short-term stays grew +11% YoY. This trend suggests that travelers, especially leisure visitors, are increasingly opting for holiday apartments, cabins, and other rental options, boosting capacity in peak seasons. (Q4/2025 short-term rental data will be released later, but the year-to-date trend indicates continued strength).

Summary

Travel to Finland and to the Nordics

- **The Nordic region:** From January to November 2025, Finland recorded **6.2 million** foreign overnight stays, which represents about **12%** of all foreign overnights in the Nordic region (excluding Iceland). By comparison, **Sweden** and **Denmark** each account for roughly 32% of the **region's 50 million foreign nights**, and **Norway** about 23%. All four countries saw **solid growth** in 2025 foreign stays vs the previous year. Notably, **Germany** was the number-one source market for all Nordics, with German overnight volumes increasing in each country. Other long-haul markets like the **United States** and key European markets (**UK**, **Netherlands**, **France**, **Switzerland**, **Spain**) also contributed significantly to the growth across the region.
    - Every Nordic country enjoyed year-over-year overnight growth in **all seasons of 2025**. The summer season was the peak across the Nordics (about **25 million** foreign nights in total) while winter was lowest at 8 million – a pattern where **Finland leads in winter** appeal (thanks to Finnish Lapland), whereas the other Nordic countries dominate summer travel.

- **Air Connectivity & Forecast on Flight Arrivals in Spring 2026:** For the upcoming spring 2026, international seat capacity is projected to increase to **2.8 million** seats to Finland (+**5%** vs spring 2025). This is a healthy rise, though **Sweden** will see about **4.4 million** seats (+10%) and **Norway 4.0 million** seats (+8%) in the same period. Nearly all of Finland's international air seats are on flights to **Helsinki (93% share)**, underscoring Helsinki's role as the gateway to other destinations in Finland. Despite added capacity, a forecast for **spring 2026 international arrivals** anticipates **Finland** roughly matching last year's levels (0% change), while **Sweden and Norway** might see slight declines in arrivals (–1% and –4% respectively). In summary, Finland's tourism is recovering steadily and holds a competitive winter niche.

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	**284,000** *-4%* Nov/25 trips to FIN	**147M€** *-26%* Nov/25 total spend in FIN	**0.8** *-0.3* Nov/25 €/CO2	**498,800** *+6% (+9%)* Nov/25 foreign reg. overnights in FIN
Year to date	**4.5M** *+3%* Jan-Nov 2025 trips to FIN	**3.0Bn€** *-6%* Jan-Nov 2025 total spend in FIN	**1.1** *-0.1* Jan-Nov 2025 €/CO2	**6.2M** *+13% (-2%)* Jan-Nov 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	**174,400** ***+4%** (+19%)* **Dec/25 int’l flight arrivals to FIN**	**130,300** ***+2%** (+44%)* Jan/26 outlook for int’l flight arrivals to FIN	**951,500** ***+9%** (-5%)* **Dec/25 flight seat capacity to FIN**	**882,200** ***+4%** (-8%)* Jan/26 outlook for seat capacity to FIN
6 months’ historical & forecast view	**610,600** ***+2%** (-14%)* **07-12/25** (6 mths) **arrivals to FIN**	**623,500** ***+1%** (+4%)* 01-06/26 (6 mths) outlook for flight arrivals to FIN	**5.5M** ***+3%** (-14%)* **07-12/25** (6 mths) **flight seat capacity to FIN**	**5.6M** ***+6%** (-8%)* 01-06/26 (6 mths) outlook for seat capacity to FIN

**) Forecast for flight arrivals including at least 1 night stay in Finland.*

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Source: ForwardKeys Destination Gateway

Border Survey

Latest 12 months (Dec/2024 – Nov/2025) & seasonality in 2025

Foreign visitors made close to **5 million trips to Finland** over the past 12 months, showing a **4% increase** compared to the period from December 2023 to November 2024. Total spending in Finland reached **3.5 billion euros**, which was a 3% decrease from the previous year.

- **Leisure travel** comprised **76%** of all trips, with an **8% rise** in the number of trips and a **4% increase** in expenditure.
- **Work-related trips** accounted for 24% of all trips but declined by 7%, while business traveller spending fell by 20%.

Seasonality

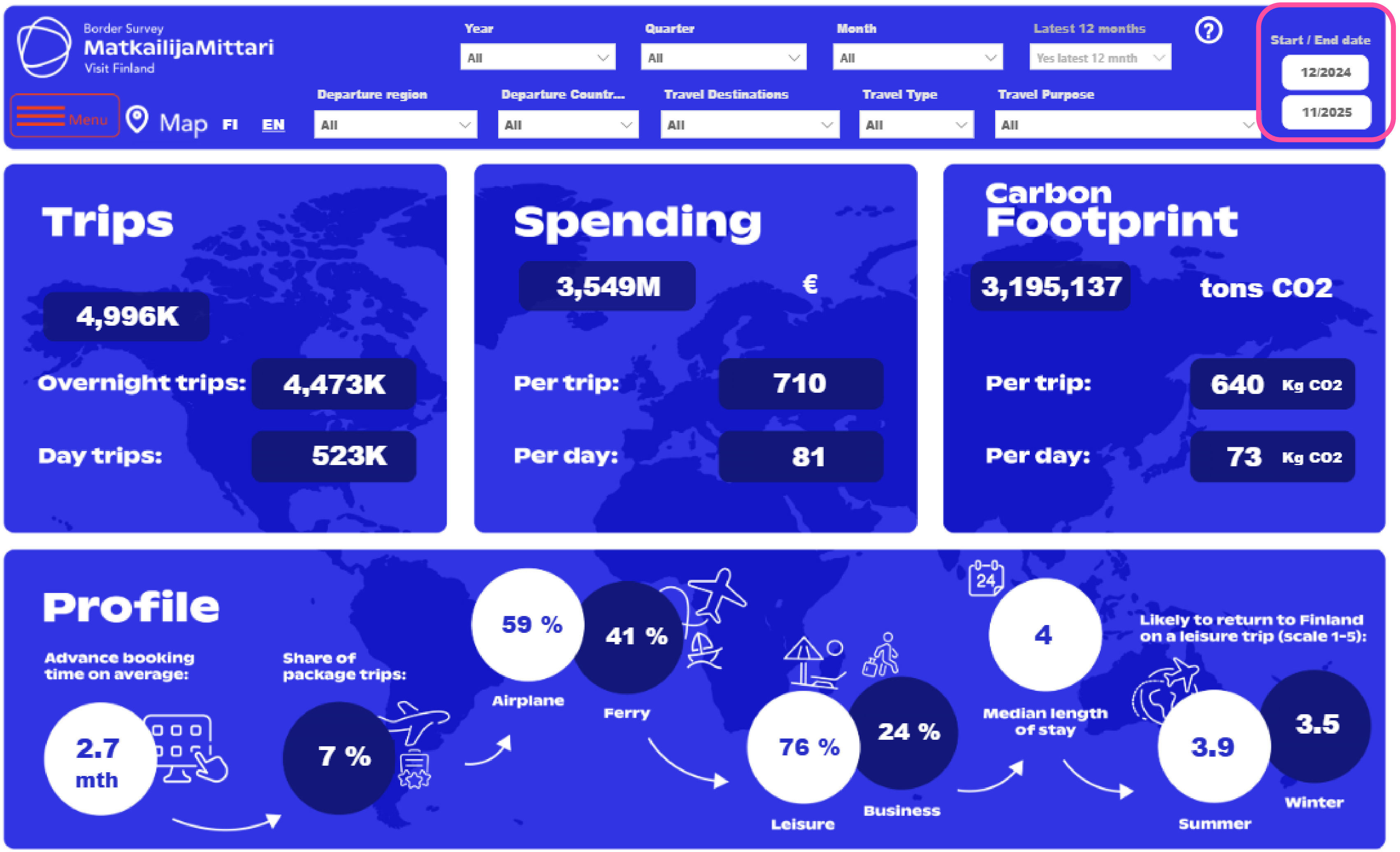
The total number of **trips to Finland increased from winter to summer 2025**, driven by **greater demand for leisure travel**. Leisure travel **grew by double digits each season** until autumn, when it dropped by **4%**.

Along with the rise in leisure trips, **spending by leisure travellers also grew between winter and summer 2025**. The winter season saw the largest increase, contributing to the overall spending growth during this period.

Business travel declined clearly from winter to summer 2025 and only slightly rose in autumn, leading to **decreased spending by business travellers** throughout each season of 2025.

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

- **5.0 million** visitors (YoY **+4%**)
  - 90% overnight trips
- Spending **3.5 billion€** (YoY -3%)
  - 710 € / trip (YoY -6%)
  - 81 € / day (YoY **+7%**)
- **76%** travelling for **leisure** (leisure trips **+8%** & spending **+4%**)
- 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)



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[Link to the report: Matkailijamittari - Visit Finland]

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

Foreign visitors in Finland

[Link to the report: Matkailijamittari - Visit Finland]

Top5 source markets for **leisure/personal trips**

- Estonia
- Germany
- Sweden
- UK
- France / USA

Top5 source markets for **work related trips**

- **Estonia**
- Sweden
- Germany
- UK
- Poland

Seasonality of trips to Finland & total spending in 2025

The total number of **trips to Finland rose** from **winter to summer 2025** due to **higher demand for leisure travel**. However, in autumn 2025, leisure trips declined compared to the previous year, and despite a slight rise in business trips, the overall number of trips to Finland fell by three percent during that season.

With the growth in leisure travel, **spending by leisure travellers** also **increased between winter and summer 2025**. The winter season experienced the most significant rise, leading to an overall increase in spending for that period. In contrast, other seasons saw a decline in total spending, as business traveller expenditures were notably lower than in the previous year.

2025 ALL VISITORS TO FINLAND	Winter	Spring	Summer	Autumn
Total trips	**1,244K**	**1,137K**	**1,643K**	**971K**
YoY Total Trips change %	+6 %	+5 %	+6 %	-3 %
Total Spending €	**1,230M**	**793M**	**1,000M**	**526M**
YoY Total Spending € change %	+15 %	-8 %	-2 %	-24 %

2025 LEISURE TRAVELLERS	Winter	Spring	Summer	Autumn
Leisure trips	**992K**	**769K**	**1,358K**	**659K**
YoY Leisure trips change %	+10 %	+13 %	+10 %	-4 %
Leisure trips spending €	**1,041M**	**542M**	**794M**	**329M**
YoY Leisure trips € change %	+19 %	+4 %	+5 %	-28 %

2025 BUSINESS TRAVELLERS	Winter	Spring	Summer	Autumn
Business trips	**232K**	**360K**	**280K**	**311K**
YoY Business trips change %	-9 %	-7 %	-12 %	+1 %
Business trips spending €	**165M**	**246M**	**201M**	**197M**
YoY Business trips € change %	-15 %	-27 %	-22 %	-15 %

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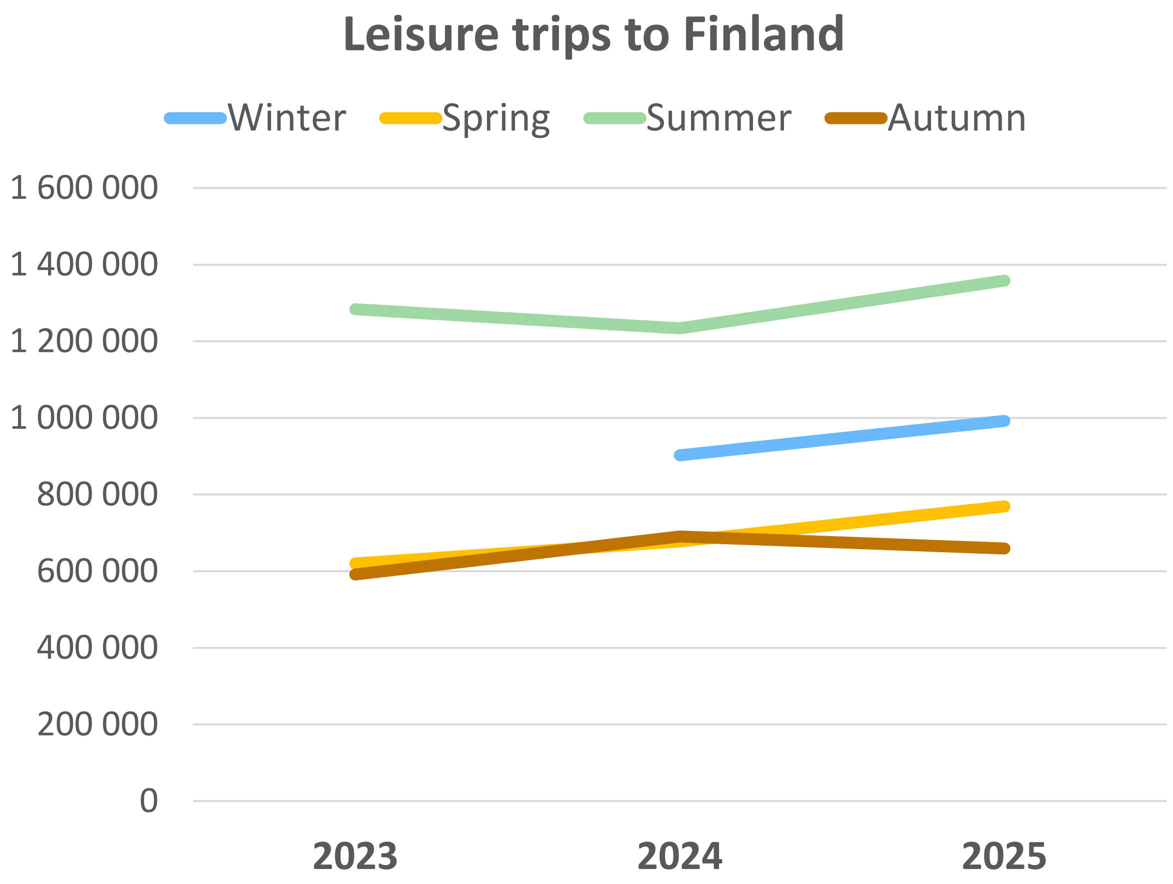
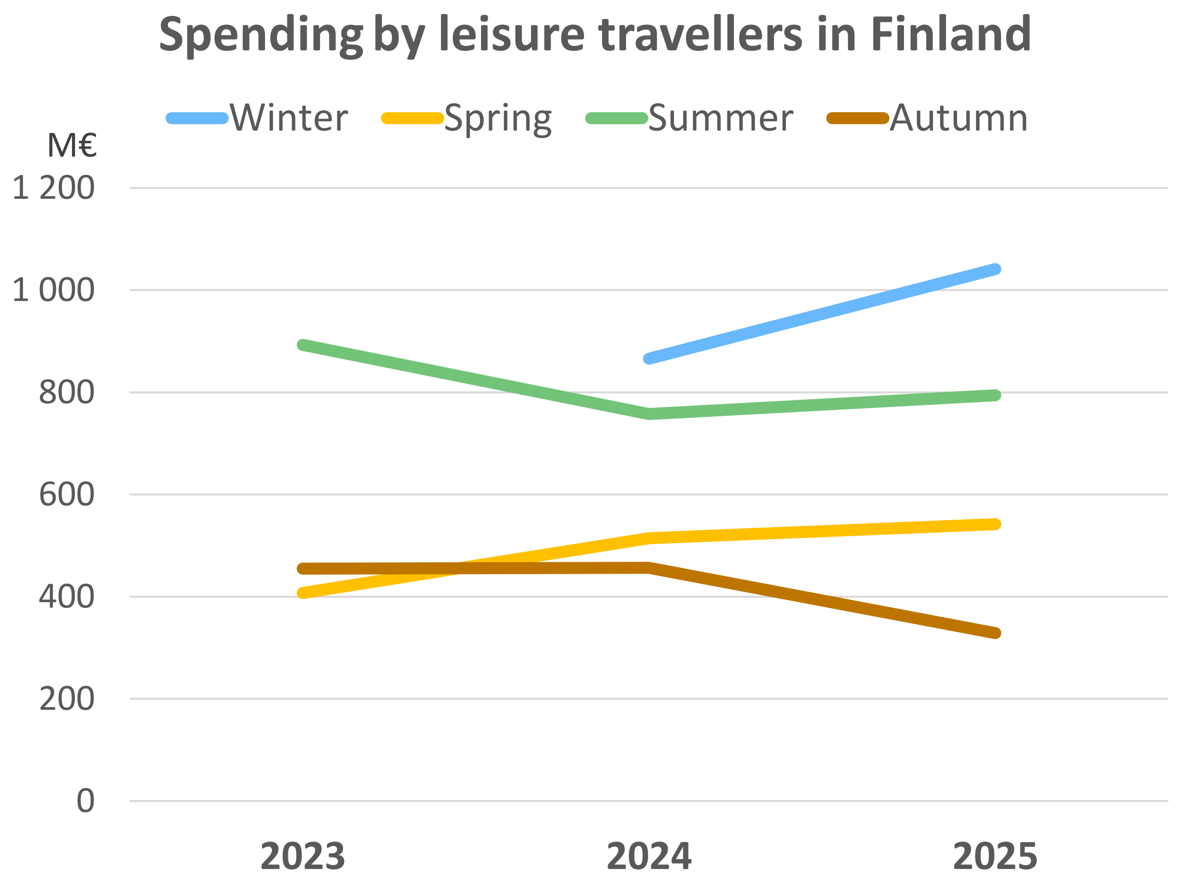
Link to the report:
Tourism review (data view page)

Seasonality trends on leisure trips & spending (M€)





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[Link to the report:
Tourism review (data view page)]

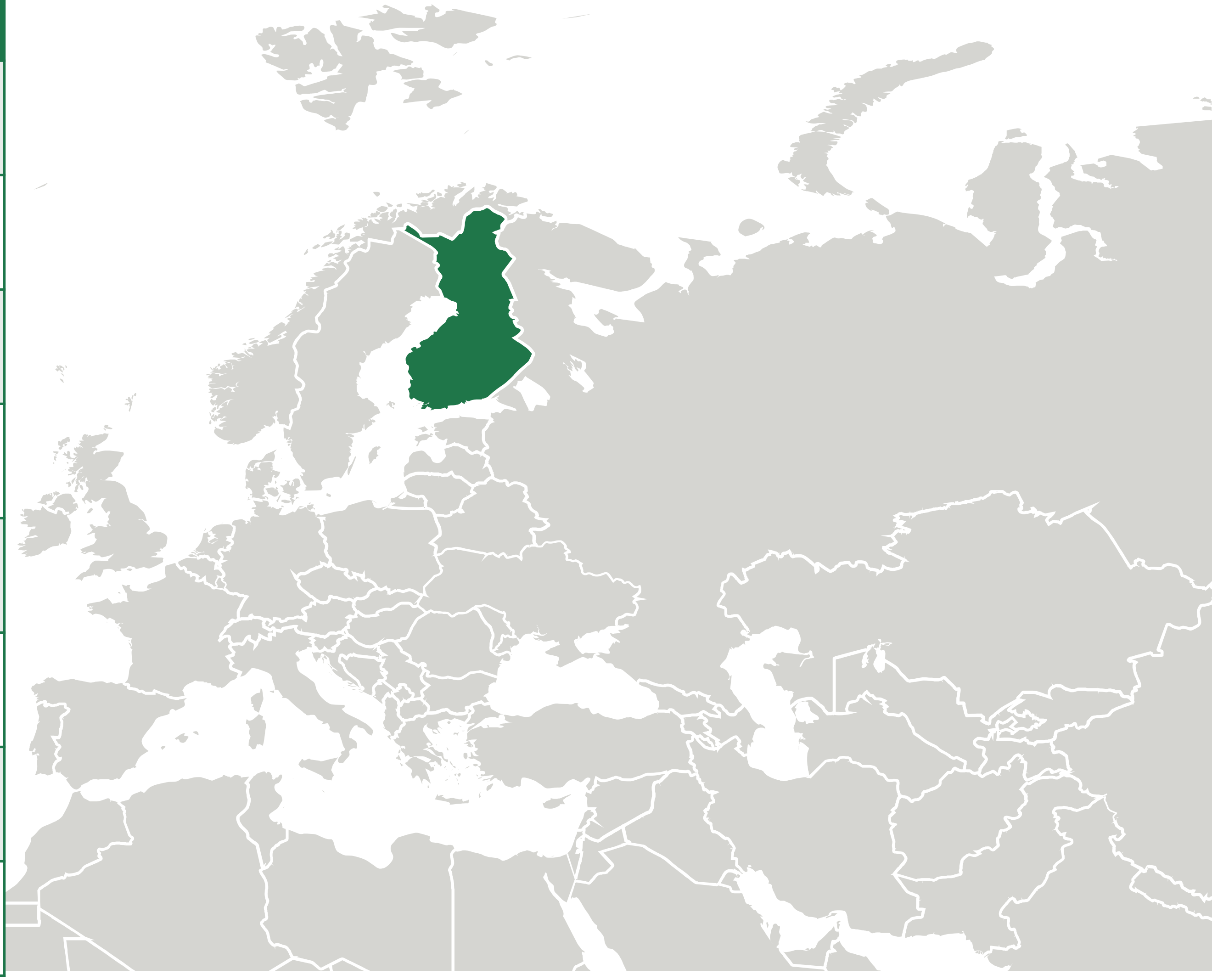
Registered Overnights

- **Jan-Nov 2025**
  - The number of registered foreign overnights reached nearly **6.2 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.

- **November 2025**
  - Total foreign overnights reached nearly **498,800** in November (**+6%** YoY, *& +9% compared to Nov-2019*).
  - Leading source market in November was **UK**, followed by **Germany**, **USA**, and **Sweden**.
    - **Japan** surpassed first time the level of 2019 overnights in November
  - **38%** of registered foreign overnights took place in **Helsinki**, (189,200 foreign overnight stays), and **Rovaniemi** was the second largest destination with 82,600 registered foreign overnights (17% of all).

Registered overnights January – November 2025

	Jan-Nov 2025	Change-% vs. Jan-Nov **2024**	*Change-% vs. Jan-Nov 2019*
Total	**21.1M**	**+2%**	*-1%*
Domestic	**15.0M**	**-2%**	*0%*
Foreign, total	**6.2M**	**+13%**	*-2%*
Foreign excl. Russia	**6.1M**	**+13%**	*+11%*
Scandinavia	837,700	**+6%**	*-1%*
EU-27 + UK	**3.7M**	**+10%**	*+14%*
Asia	941,600	**+32%**	*-12%*
America	607,400	**+14%**	*+48%*



Main source markets

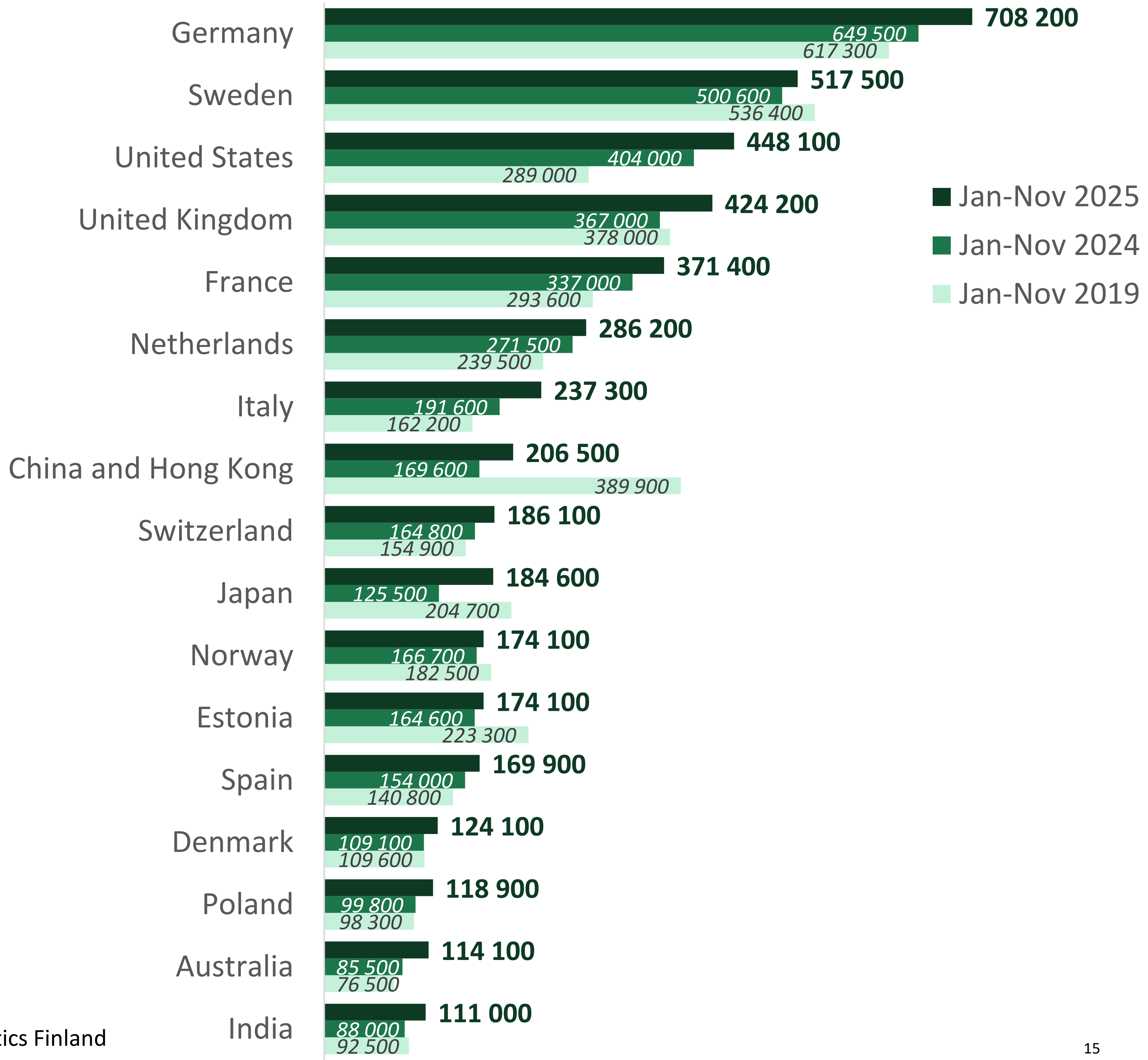
January – November 2025

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

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

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

Compared to January-November 2019, overnight stays from Sweden (-4%), China including Hong Kong (-47%), Japan (-10%), Norway (-5%), and Estonia (-22%) still lagged behind pre-pandemic levels.



Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered foreign overnights increased by 13% in November

November 2025

498,800 total foreign overnights;
+7% vs. 11/2024, *(+9% vs. 11/2019)*

498,000 foreign excl. Russia; **+7%**, *(+26%)*

279,700 EU+UK; **+8%**, *(+25%)*

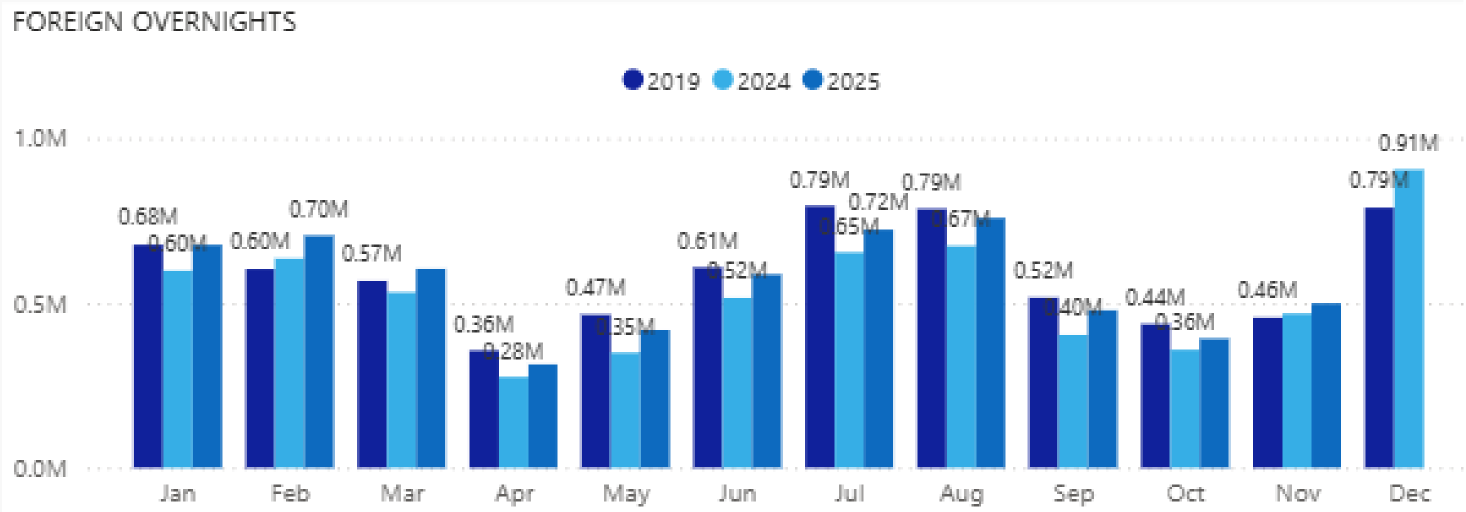
61,000 Scandinavia; **+13%**, *(+5%)*

98,300 Asia; **+14%**, *(+12%)*

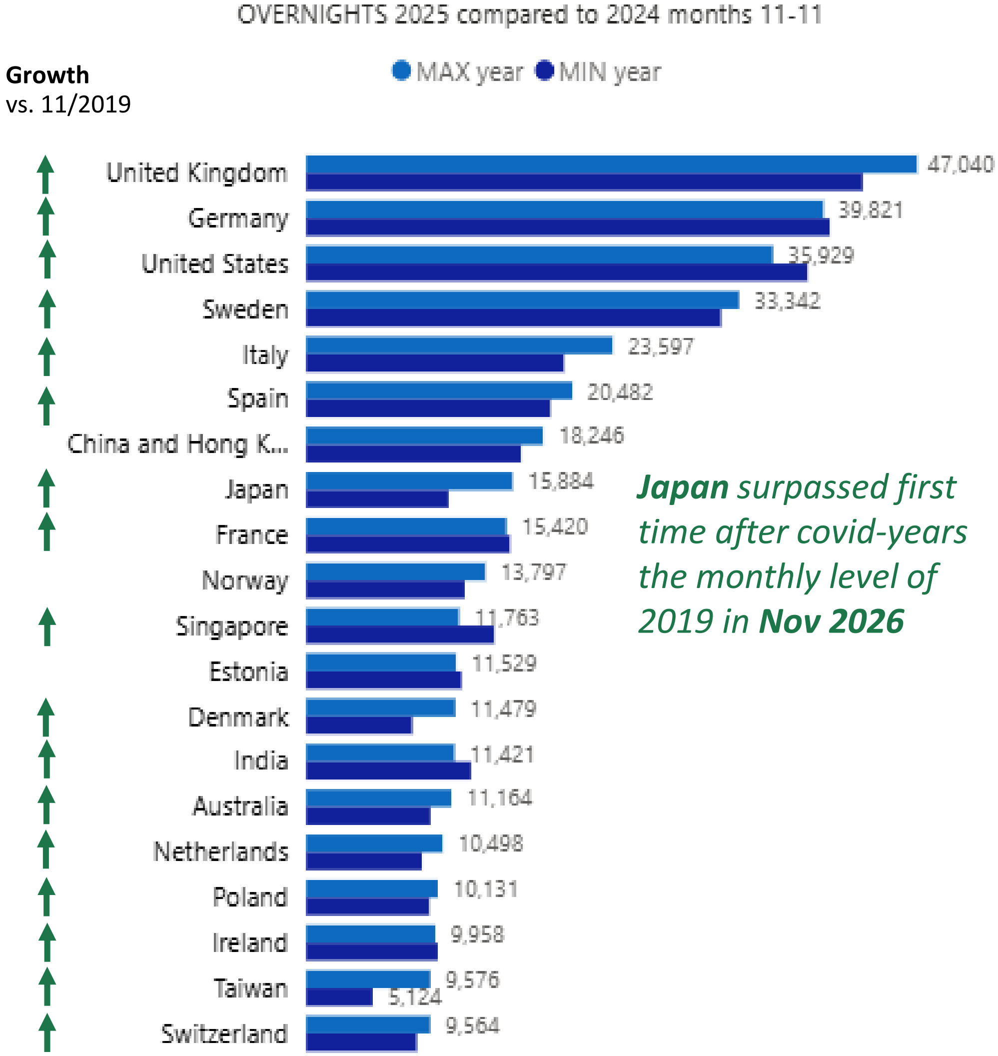
52,300 America; **+1%**, *(+85%)*

Top destinations for total foreign;
vs. 11/2024, *(vs. 11/2019)*

- **189,200 Helsinki**; **+14%**, *(+17%)*
- **82,600 Rovaniemi**; **+3%**, *(+121%)*
- 39,000 Vantaa; **+18%**, *(+22%)*
- 24,000 Kittilä-Levi; **+21%**, *(+69%)*
- 23,300 Inari-Saariselkä; **+1%**, *(+49%)*
- 14,800 Espoo; **+7%**, *(-6%)*
- 11,600 Tampere; **-20%**, *(-16%)*
- 10,900 Ruka-Kuusamo; **+10%**, *(-38%)*



Top source markets, total foreign; vs. 11/2024



Japan surpassed first time after covid-years the monthly level of 2019 in Nov 2026

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[Monthly accommodation statistics report]

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

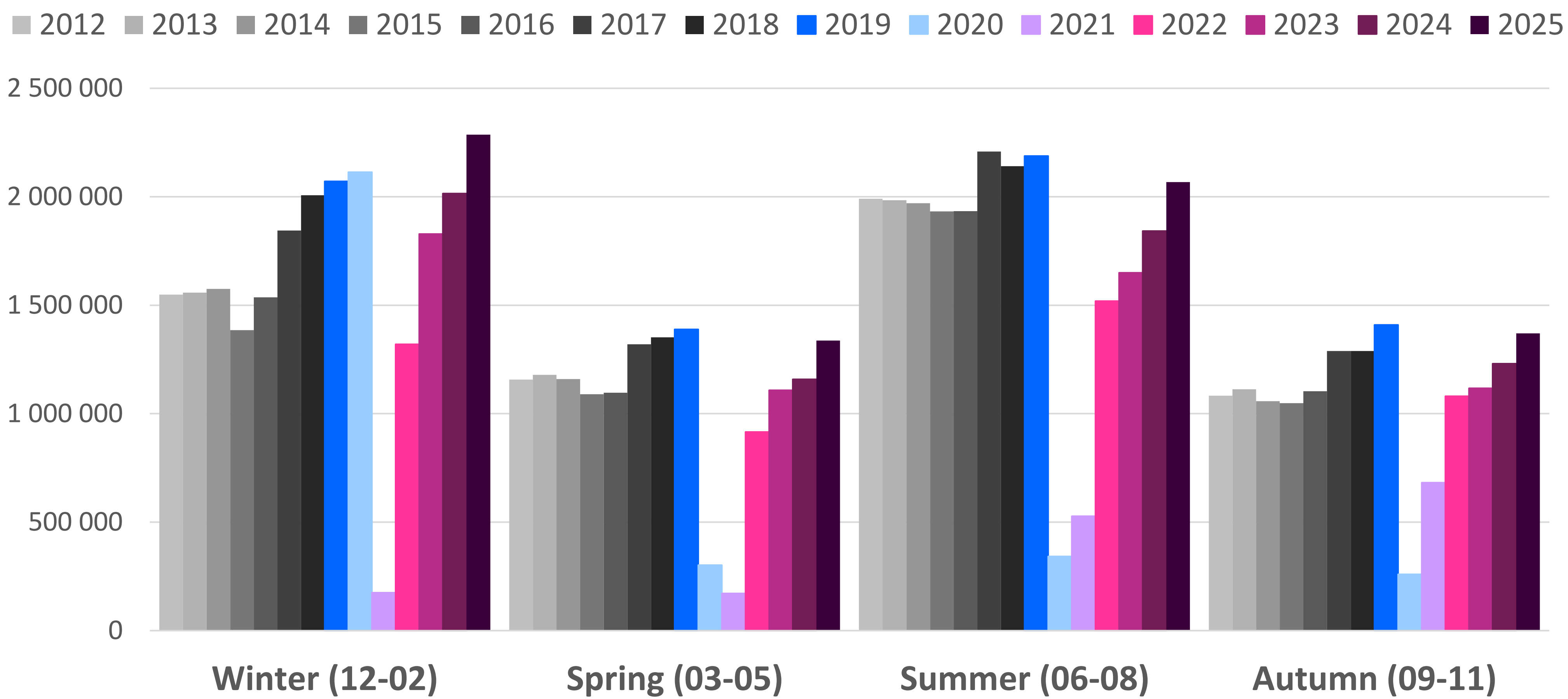
Registered foreign overnights

Autumn season 2025

Foreign overnights **increased** by **11%** compared to previous autumn. *Gap to autumn 2019 is gradually getting smaller – this summer the number of foreign overnights stayed **only 3% below** the level of pre-pandemic*. The biggest source markets during Sep – Nov 2025 were **Germany**, **Sweden**, the **US**, and the **UK**.

- **56%** of the foreign overnights took place in **Helsinki region**. Overnights **increased** compared to the previous autumn by **15%** and *by 1% compared to autumn 2019*. Biggest source market was the **US** (+8% YoY).
- **Lapland region** was the second biggest with 21% share of foreign overnights (**+6%** YoY & *+61% vs. 2019*).
  - Top destinations: **Rovaniemi** (+6% YoY), **Inari-Saariselkä** (+7%), and **Kittilä-Levi** (+22%).
  - Main source markets: the **UK** (+7% YoY) and **Germany** (-2% YoY)
- In **the Coast & Archipelago region** foreign overnights **increased** by **1%** compared to previous autumn, but remained *-35% below autumn 2019.*
  - Top destinations: **Åland** (+9% YoY), **Turku** (+5%), **Oulu** (-10%), and **Vaasa** (+12%).
  - Main source market: **Sweden** (+4%YoY)
- Foreign overnights **increased** by **19%** in **Lakeland**. *The gap to autumn 2019 is -31%*.
  - Top destinations: **Tampere** (+8% YoY), **Jyväskylä** (+2%), and **Lahti** (+38%).
  - Main source market: **Germany** (+18% YoY)

Foreign seasonal overnights in Finland 2012-2025



	Winter (12-02)	Spring (03-05)	Summer (06-08)	Autumn (09-11)
Overnights 2025	**2.3M**	**1.3M**	**2.1M**	**1.4M**
2025 YoY change	**+13%**	**+15%**	**+12%**	**+11%**
Change pre-pandemic	*+10%*	*-4%*	*-6%*	*-3%*

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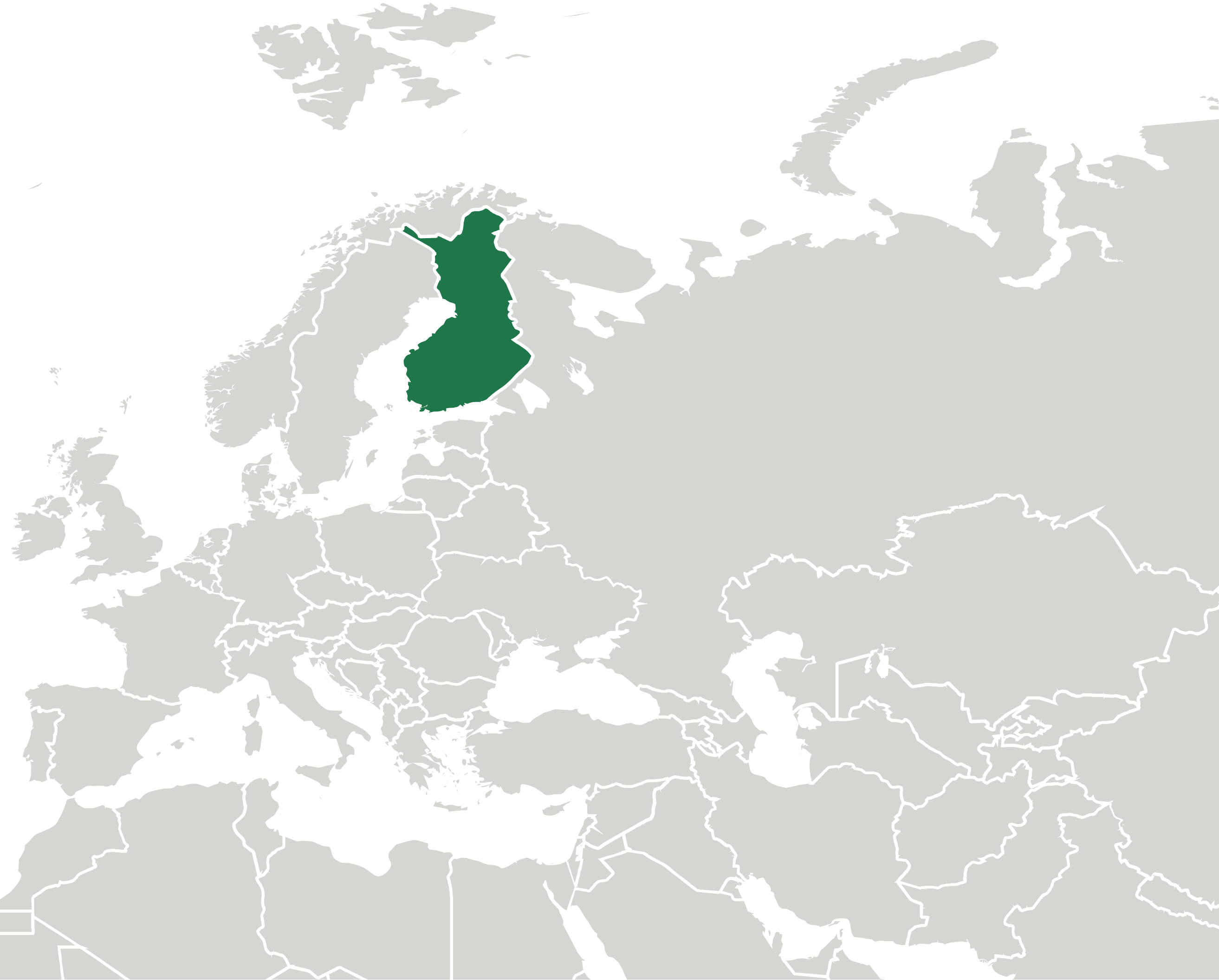
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered overnights autumn season 2025

	Sep-Nov 2025	Change-% vs. Sep-Nov 2024	Change-% vs. Sep-Nov 2019
Total	**5.0M**	**+3%**	0%
Domestic	**3.7M**	**0%**	+1%
Foreign, total	**1.4M**	**+11%**	-3%
Foreign excl. Russia	**1.4M**	**+11%**	+8%
Scandinavia	196,600	**+12%**	+3%
EU-27 + UK	**752,800**	**+11%**	+7%
Asia	265,800	**+27%**	-8%
America	152,200	**+7%**	+50%



Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Main source markets

Autumn season 2025

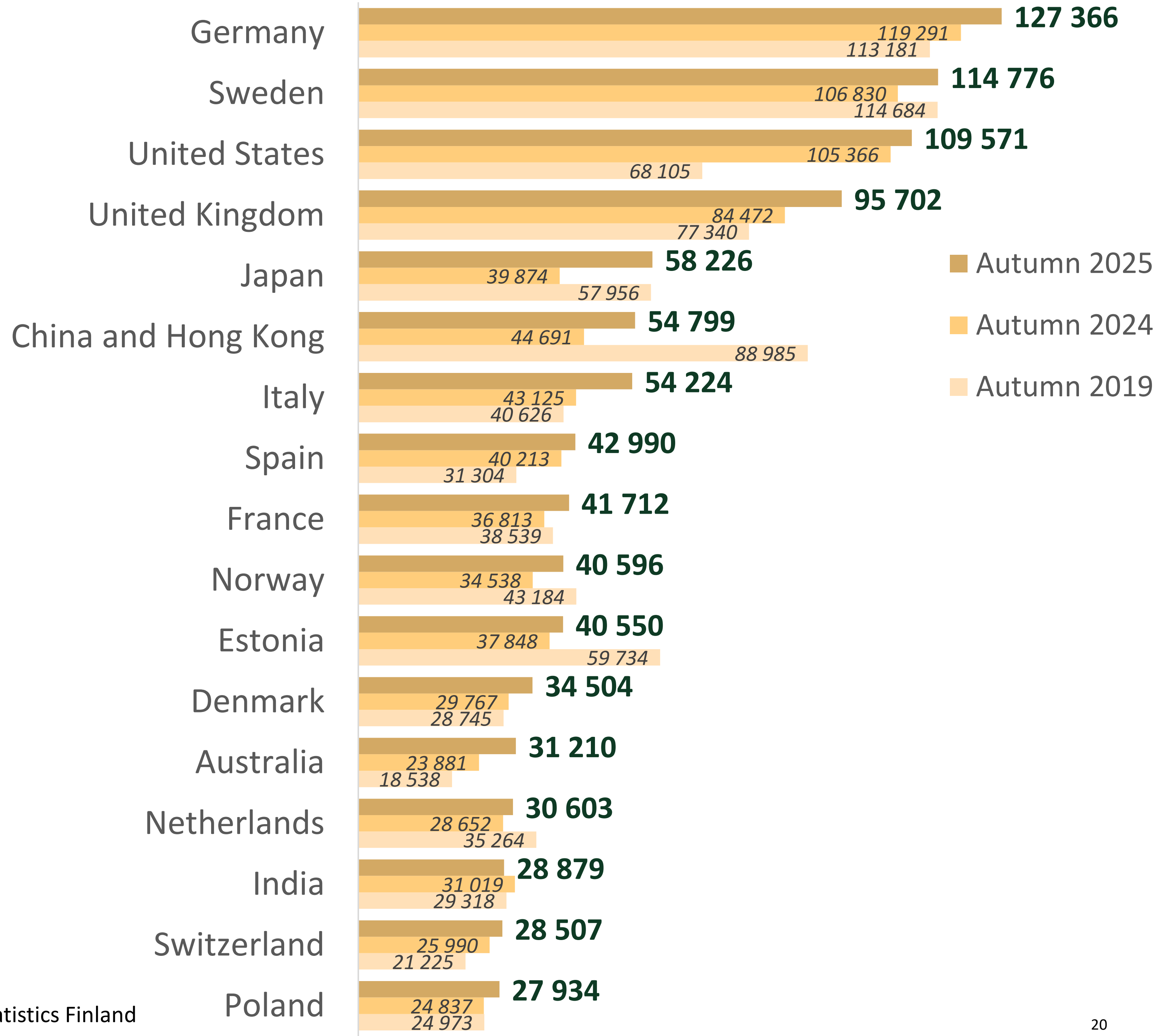
vs. autumn 2024 & *autumn 2019*

1.4M foreign overnights
+11% vs. autumn 2024
-3% vs. autumn 2019

When examining registered overnight stays, there was **an increase from several important source markets** compared to both last autumn and autumn 2019.

However, overnight stays were still below autumn 2019 levels from China (-38%), Norway (-6%), Estonia (-32%), and the Netherlands (-13%).

Sweden *and* ***Japan****, on the other hand, matched their registered overnight figures from autumn 2019.*



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Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Overnights in short-term rentals Jan-Sep 2025

- The importance of **short-term rentals via international platforms** continued to grow especially during the winter months.
- Between **January and September 2025**, foreign overnights in **short-term rentals** added up to **2.6 million**, which was 33% of the total paid foreign overnights in Finland.
- Seasonality of **total paid foreign overnights in 2025**:

2025 Foreign	Winter	Spring	Summer
Total Paid overnights	**3.8M**	**2.0M**	**2.9M**
YoY Total paid nights change %	+31 %	+21 %	+12 %
Registered overnights	**2.3M**	**1.3M**	**2.1M**
YoY Registered nights change %	+13 %	+15 %	+12 %
Short term rentals nights	**1.5M**	**0.6M**	**0.8M**
YoY s-t rentals nights change %	+73 %	+35 %	+11 %
Share of s-t rentals nights of total	*39 %*	*32 %*	*29 %*

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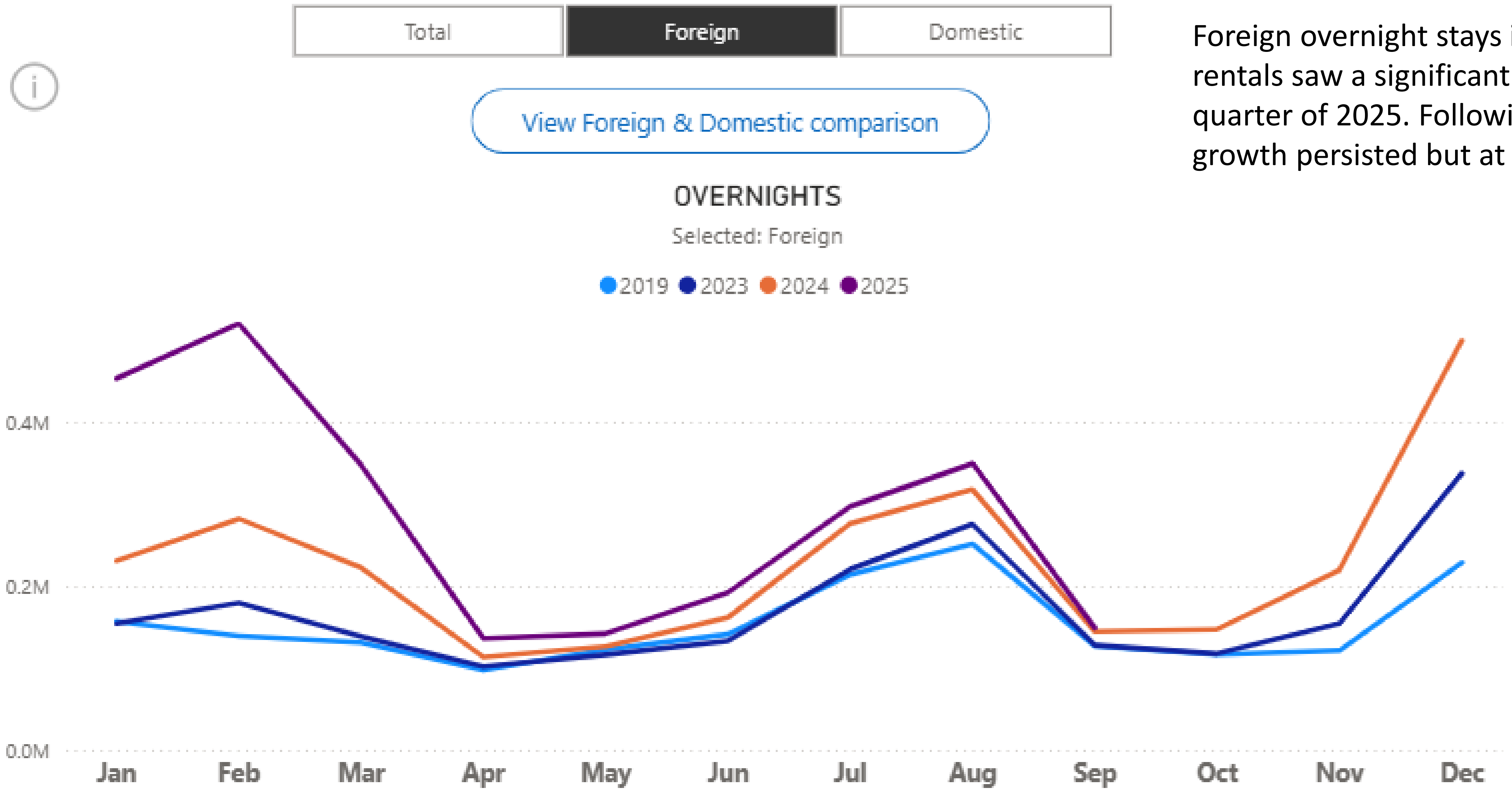
Autumn 2025 overnights in short-term rentals will be published later this spring.

Monthly foreign overnights in short-term rentals

Jan-Sep 2025 & years 2024/2023/2019



Foreign overnight stays in short-term rentals saw a significant rise in the first quarter of 2025. Following that period, the growth persisted but at a slower rate.

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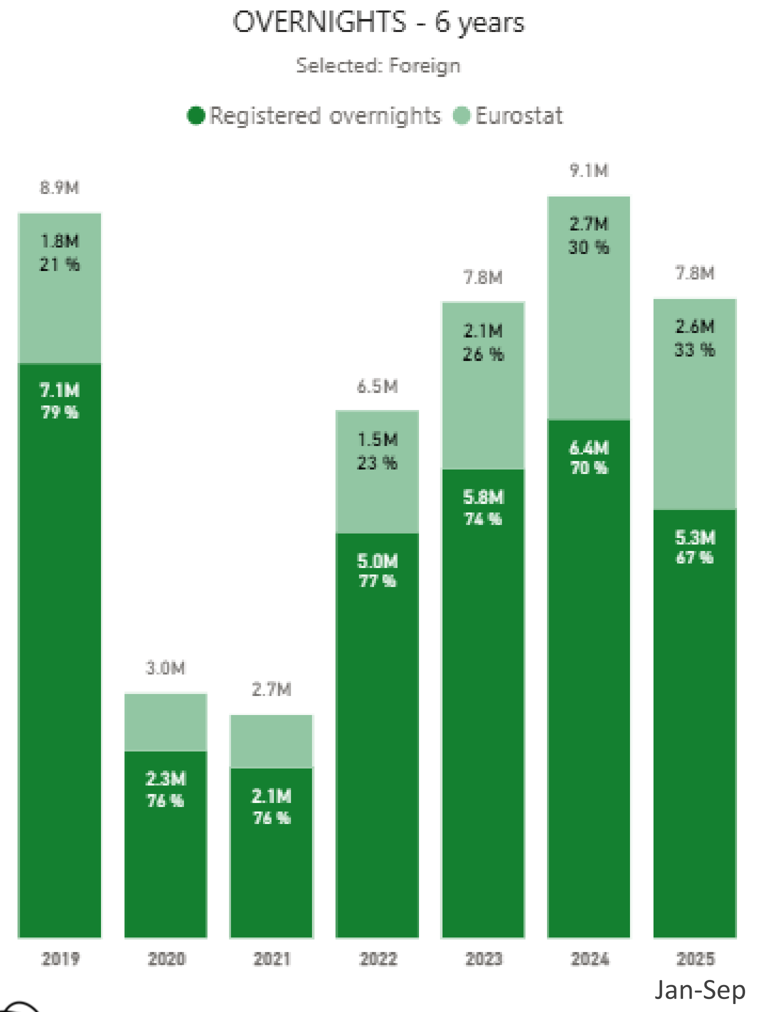
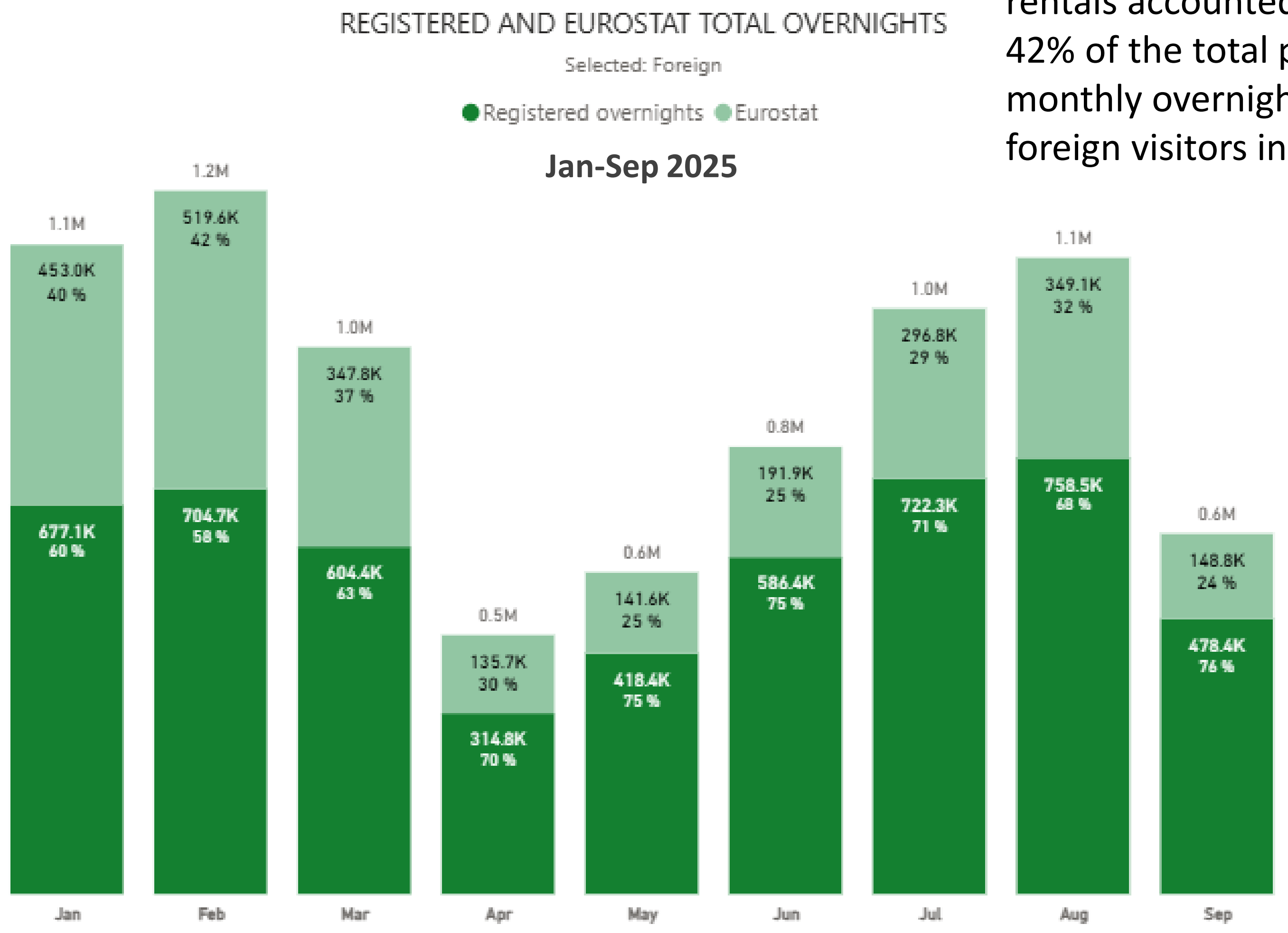
Source: Visit Finland Statistics Service Rudolf, Statistics Finland, Eurostat

Monthly foreign total paid overnights Jan-Sep 2025

(Registered overnights + overnights in short-term rentals)

Total | Foreign | Domestic





Between January and September 2025, short-term rentals accounted for 24% to 42% of the total paid monthly overnight stays by foreign visitors in Finland.

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Source: Visit Finland Statistics Service Rudolf, Statistics Finland, Eurostat

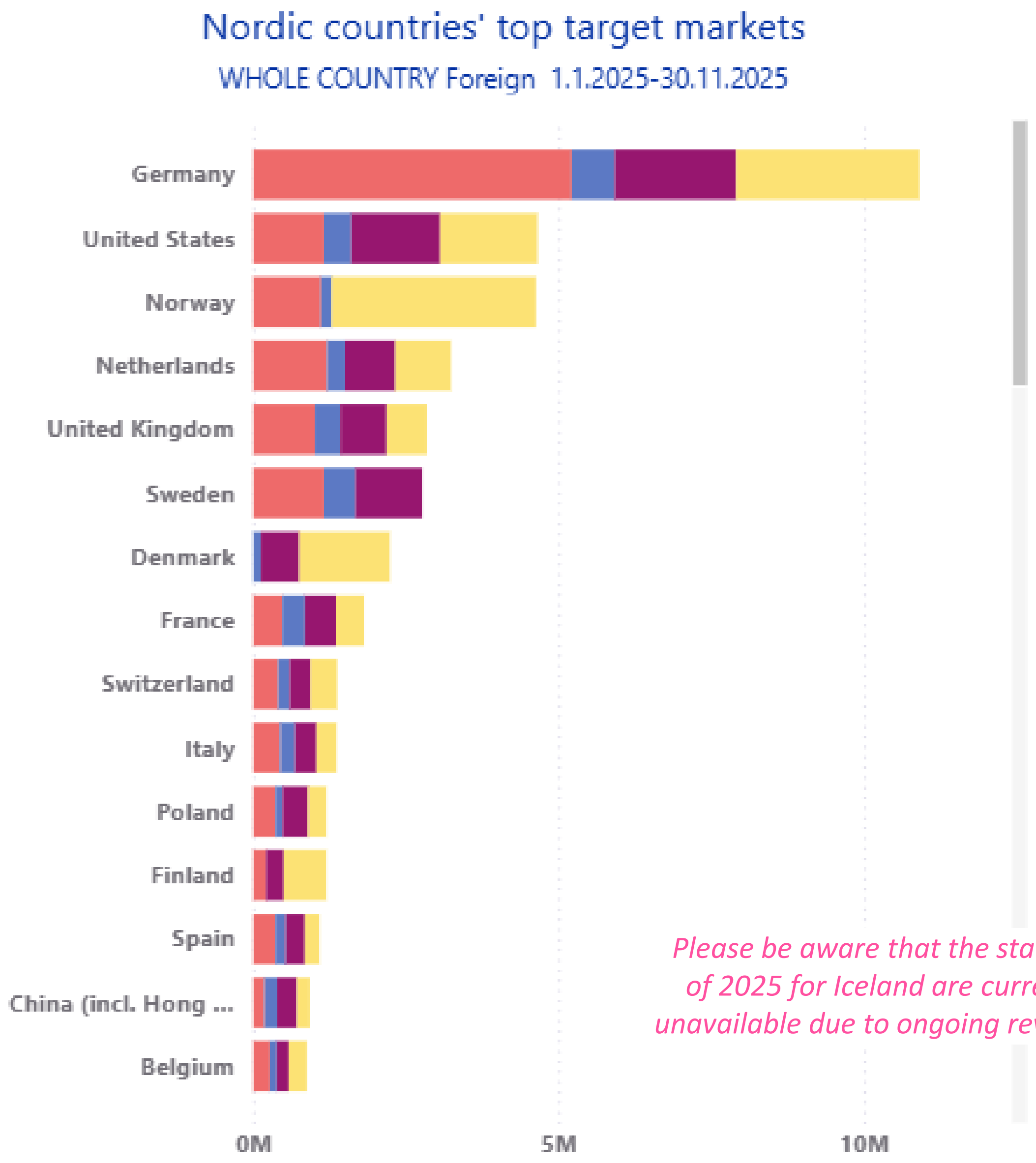
Registered overnights in the Nordics

Jan-Nov 2025

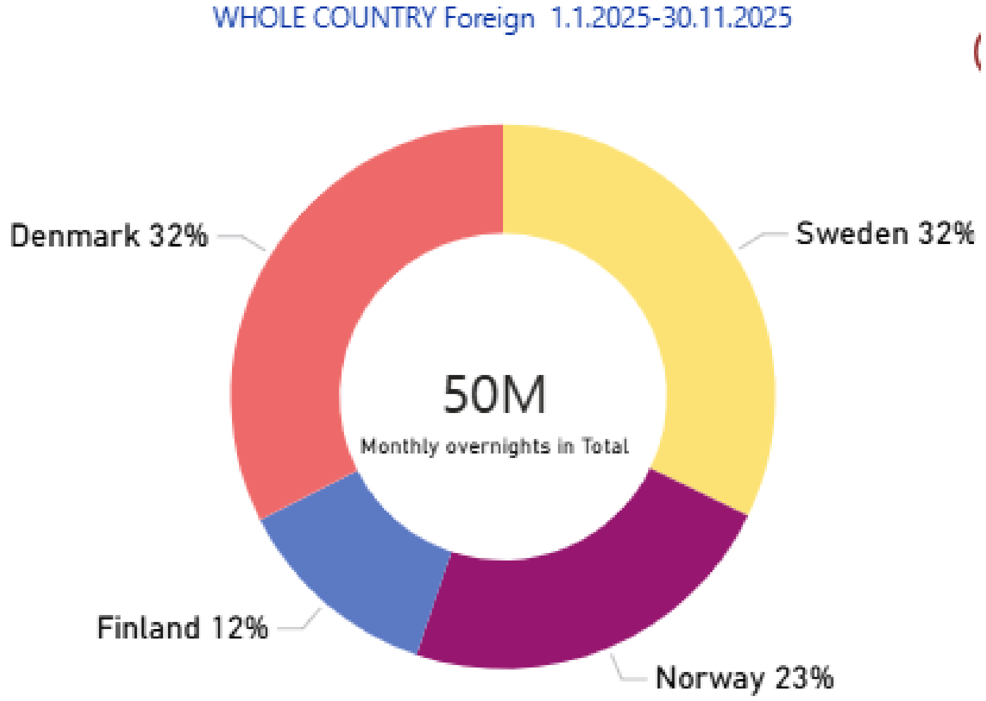
- The Nordic region has **experienced good growth** in **registered foreign overnight stays** from January to November 2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **12%** (Denmark and Sweden having both a 32% and Norway 23% share).
    - **Germany** is clearly the biggest source market, and their overnights have increased in each of the four Nordic countries compared to the 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.

- The **number of registered foreign overnight stays** in each of the four Nordic countries **has risen every season in 2025** compared to the same period during the previous year.
- **The highest number of foreign overnight stays** occurred during the **summer season**, reaching **25 million**. Conversely, the **winter season**, when Finland is the market leader, recorded **the lowest** total of foreign overnight stays (**8 million**).

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



Please be aware that the statistics of 2025 for Iceland are currently unavailable due to ongoing revisions.



Nordics	Monthly	YoY change %
Denmark	16,117,942	7 %
Sweden	15,983,666	11 %
Norway	11,400,900	16 %
Finland	6,156,543	13 %
Total	**49,659,051**	**11 %**

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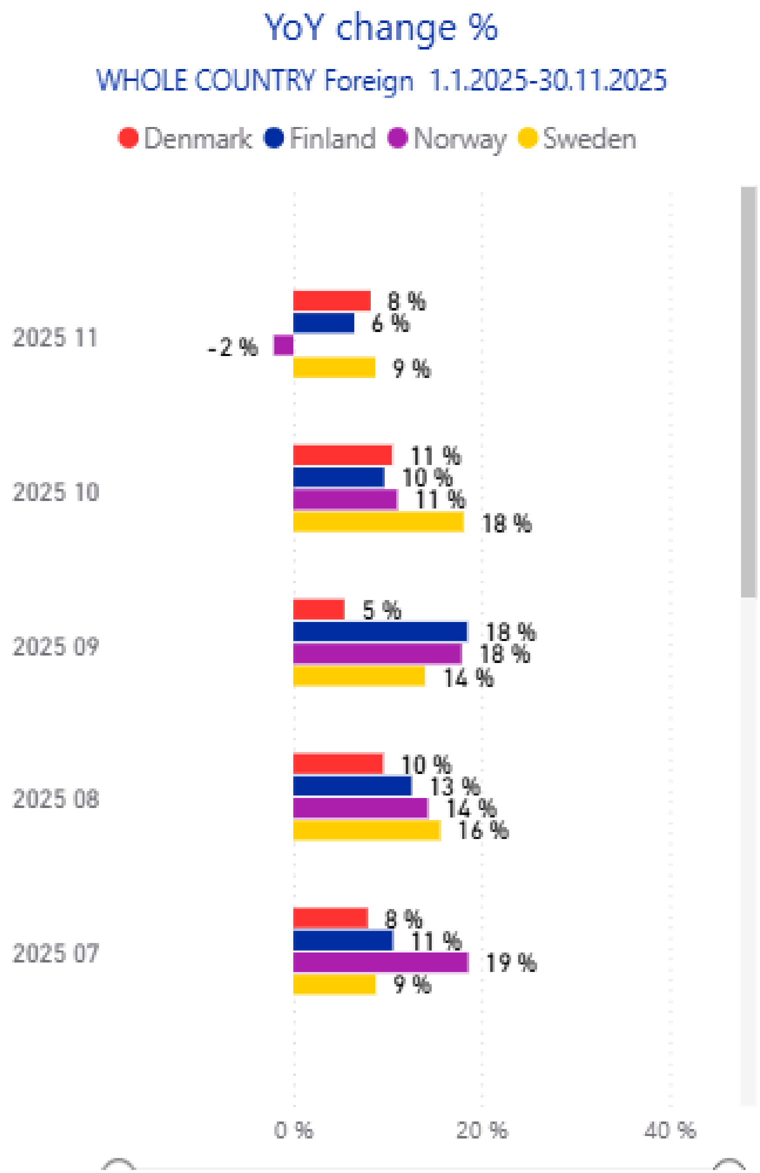
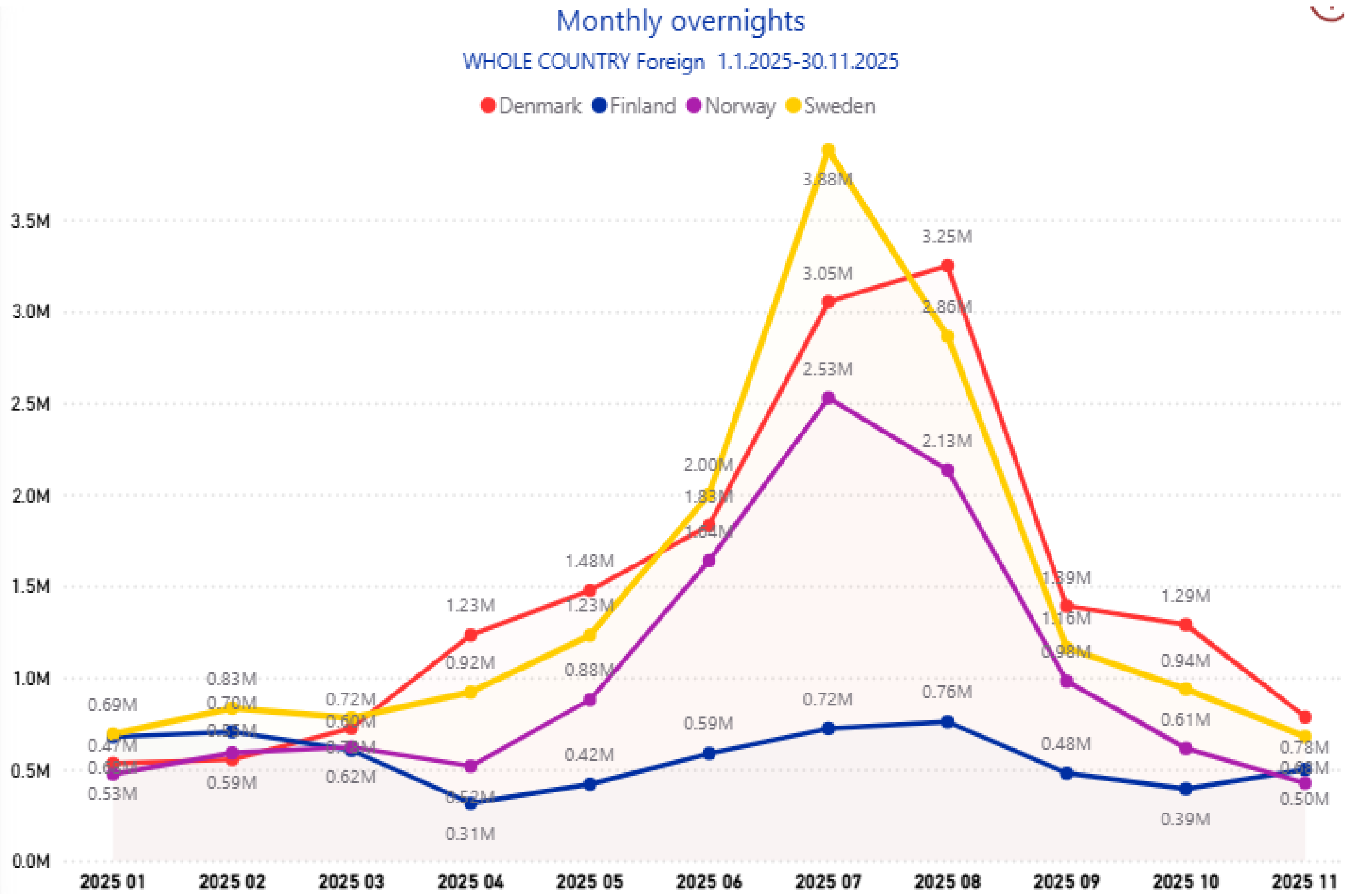
[Nordic report]

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





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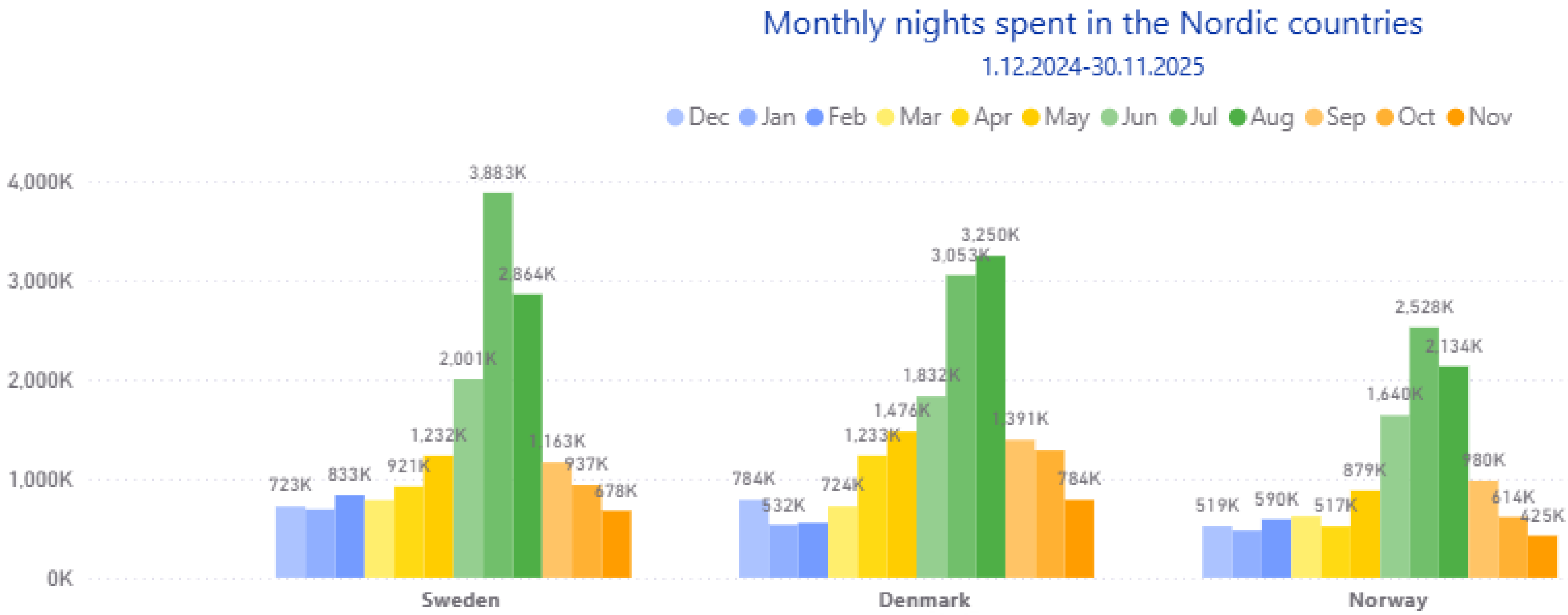
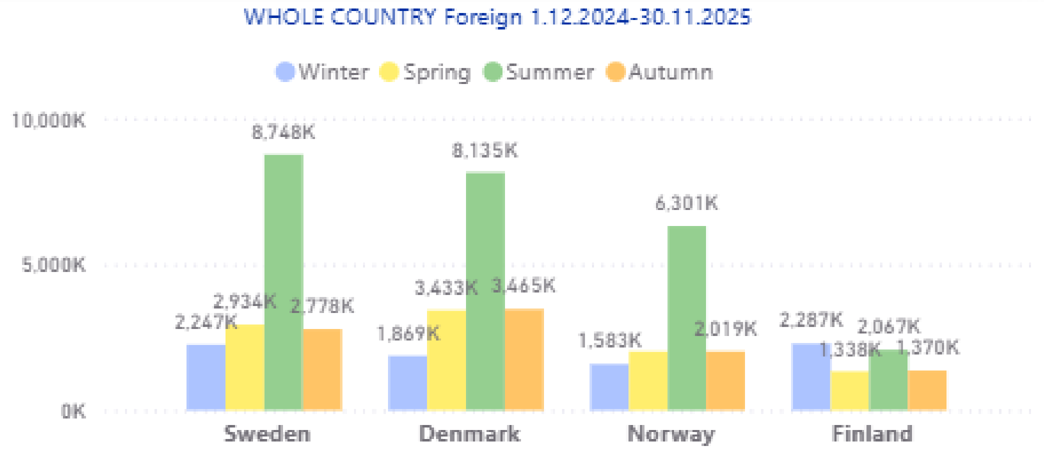
Nordic report

Seasonality of overnights in the Nordics (excl. Iceland) in 2025



The number of registered foreign overnight stays in each of the Nordic countries has risen every season compared to the same period in the previous year.



WHOLE COUNTRY Foreign 1.12.2024-30.11.2025

Season	Winter		Spring		Summer		Autumn	
Nordics	Overnights	YoY change %	Overnights	YoY change %	Overnights	YoY change %	Overnights	YoY change %
Sweden	2,247,199	5 %	2,933,534	9 %	8,747,602	12 %	2,777,938	14 %
Denmark	1,869,335	15 %	3,432,827	3 %	8,135,213	9 %	3,464,567	8 %
Norway	1,582,525	22 %	2,017,397	19 %	6,300,941	16 %	2,018,985	11 %
Finland	2,286,782	13 %	1,337,560	15 %	2,067,225	12 %	1,370,023	11 %
Total	**7,985,841**	**13 %**	**9,721,318**	**9 %**	**25,250,981**	**12 %**	**9,631,513**	**11 %**

The highest number of foreign overnight stays occurred during the **summer season**, reaching 25 million. Conversely, the **winter season** recorded the lowest total of foreign overnight stays (8 million).

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[Nordic report]

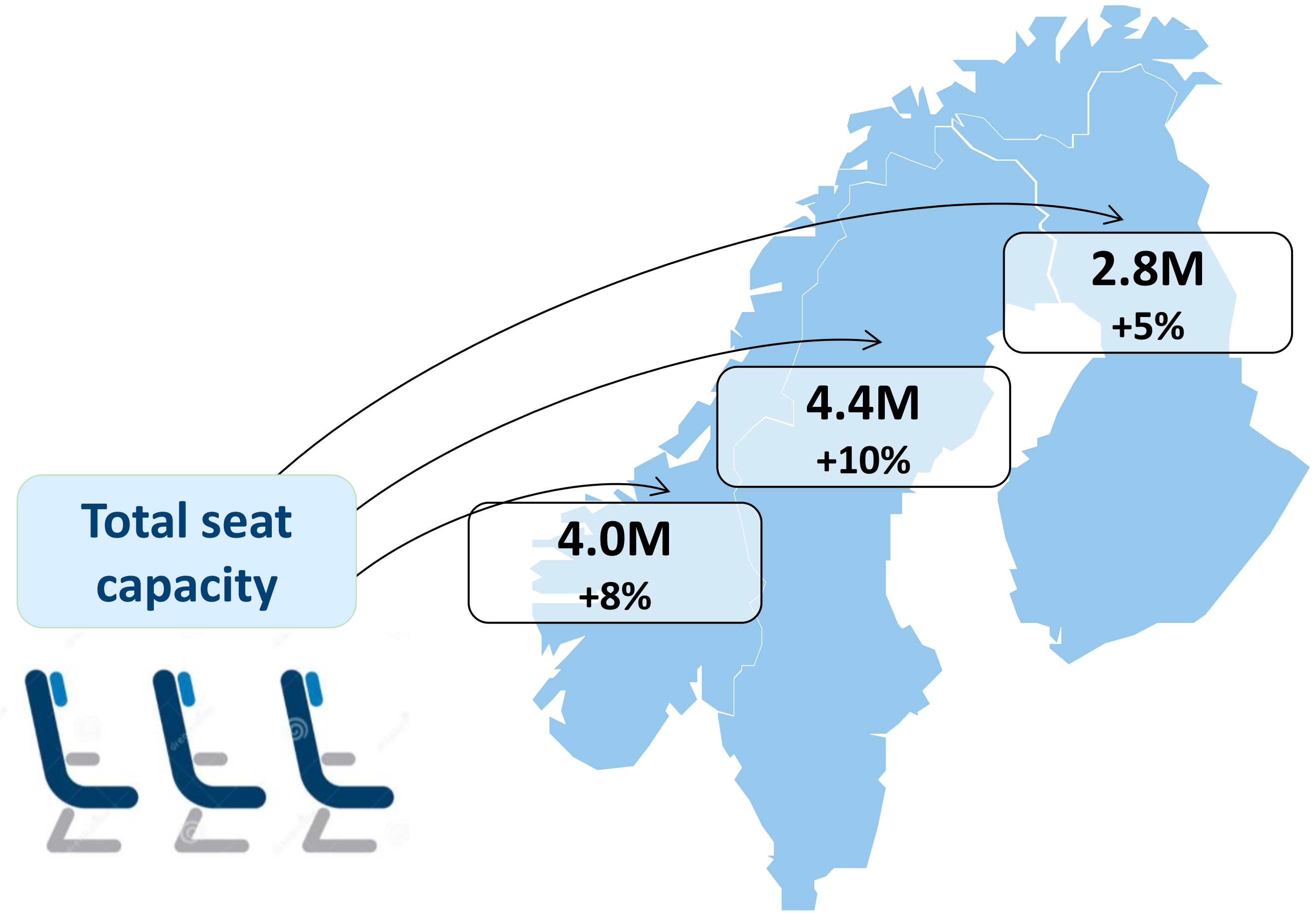
International Flight Seat Capacity March – May 2026

- Overall int’l seat capacity to Finland during the spring season is showing a 5% increase compared to last spring.
  - However, there will be less flights and lower seat capacity from London (LHR) to Helsinki by Finnair, from Paris (CDG) to Helsinki by Air France, and from Dallas (DFW), Chicago (ORD), Los Angeles (LAX), and Seattle (SEA) to Helsinki compared to last spring.
  - 93% of the total seat capacity to Finland will be available on direct flights to Helsinki.

- Overall int’l seat capacity will also increase to Sweden (+10%) and to Norway (+8%) compared to last spring.

Total Seat capacity to FI, SE & NO for spring (Mar-May) 2026

Comparison to previous spring

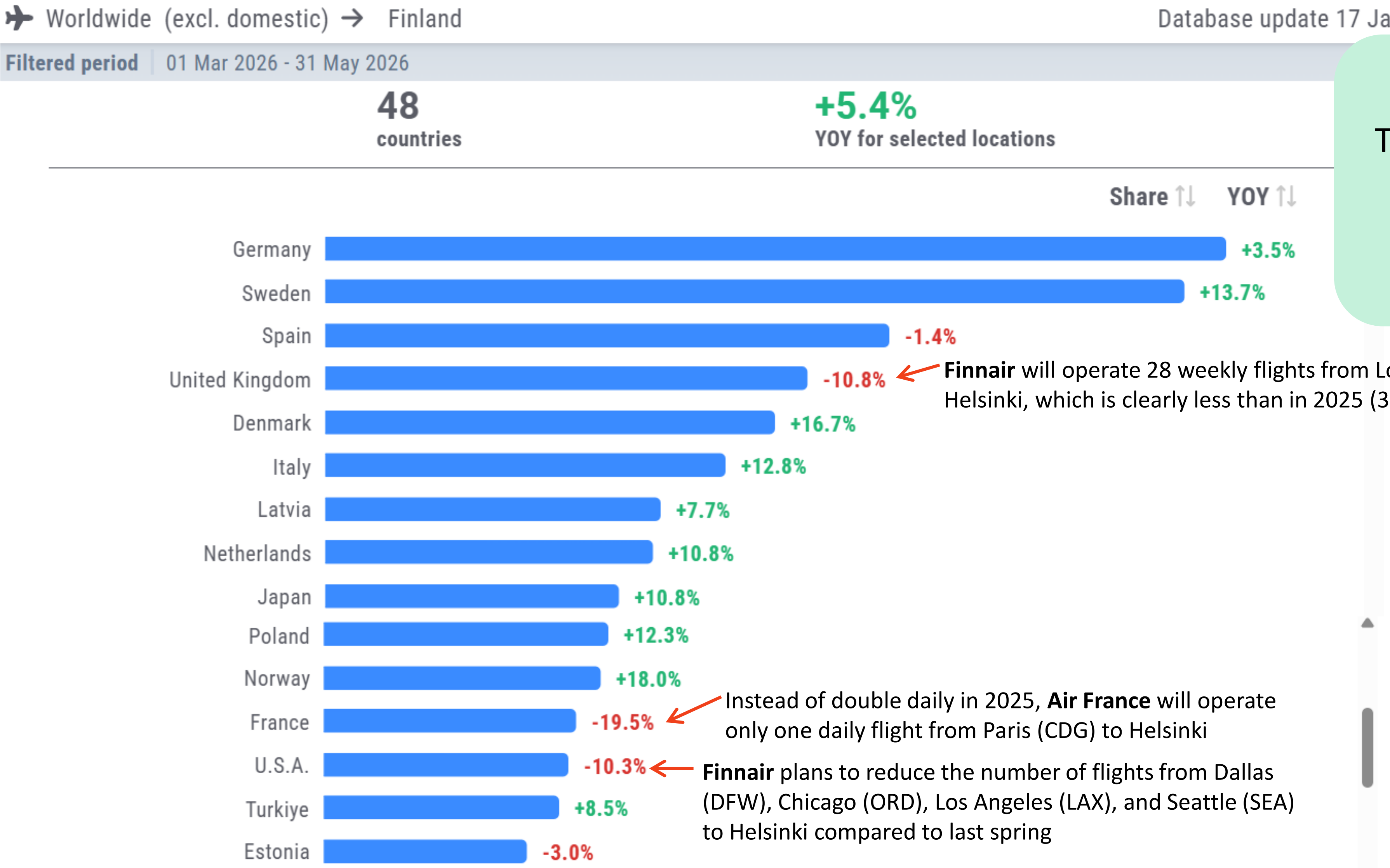


Database update 17-Jan

Source: Destination Gateway by Amadeus/ForwardKeys

Int’l seat capacity to Finland for Mar-May 2026

Comparison to previous spring



Finnair will operate 28 weekly flights from London (LHR) to Helsinki, which is clearly less than in 2025 (33-42 weekly flights)

Instead of double daily in 2025, **Air France** will operate only one daily flight from Paris (CDG) to Helsinki

Finnair plans to reduce the number of flights from Dallas (DFW), Chicago (ORD), Los Angeles (LAX), and Seattle (SEA) to Helsinki compared to last spring

Mar-May 2026

Total seat capacity to whole **Finland 2.8M**

Seat capacity to **Helsinki 2.4M** (93% of total)

Database update 17-Jan

Source: Destination Gateway by Amadeus/ForwardKeys

Int’l seat capacity to Sweden for Mar-May 2026

Comparison to previous spring

Mar-May 2026

Total seat capacity to whole **Sweden 4.4M**

Seat capacity to **Stockholm 3.4M** (79% of total)

Database update 17-Jan

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Source: Destination Gateway by Amadeus/ForwardKeys

Int’l seat capacity to Norway for Mar-May 2026

Comparison to previous spring

Mar-May 2026

Total seat capacity to whole **Norway 4.0M**

Seat capacity to **Oslo 2.8M** (72% of total)

Database update 17-Jan

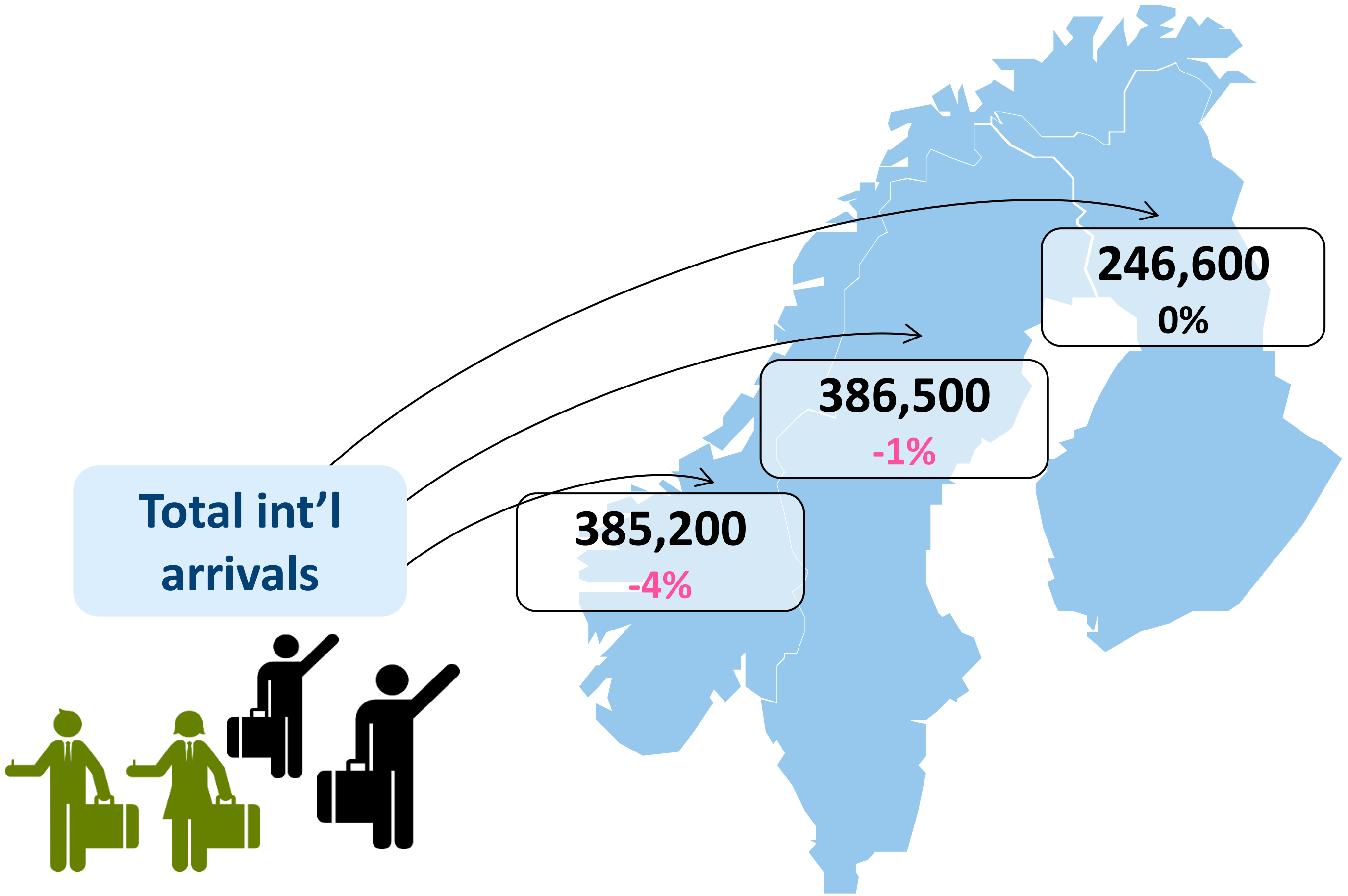
Source: Destination Gateway by Amadeus/ForwardKeys

Forecast for Flight Arrivals March – May 2026

- The forecast for total international flight arrivals to Finland during the spring season 2026 indicates no change compared to last spring.
  - Main source market for spring flight arrivals to Finland are **Germany**, **Sweden**, and the **UK**.
  - **Helsinki**, **Turku**, **Vaasa**, **Kuusamo**, and **Kuopio** are projected to surpass the number of flight arrivals of last spring, while Rovaniemi, Kittilä, Ivalo, and Oulu seem to fall short of that level.
- Flight arrivals both to Sweden and to Norway are anticipated to decrease slightly compared to last spring. **Germany** and the **UK** are among the biggest source markets also to Sweden and Norway.

Forecast of total int’l arrivals* to FI, SE & NO spring (Mar-May) 2026

Comparison to previous spring



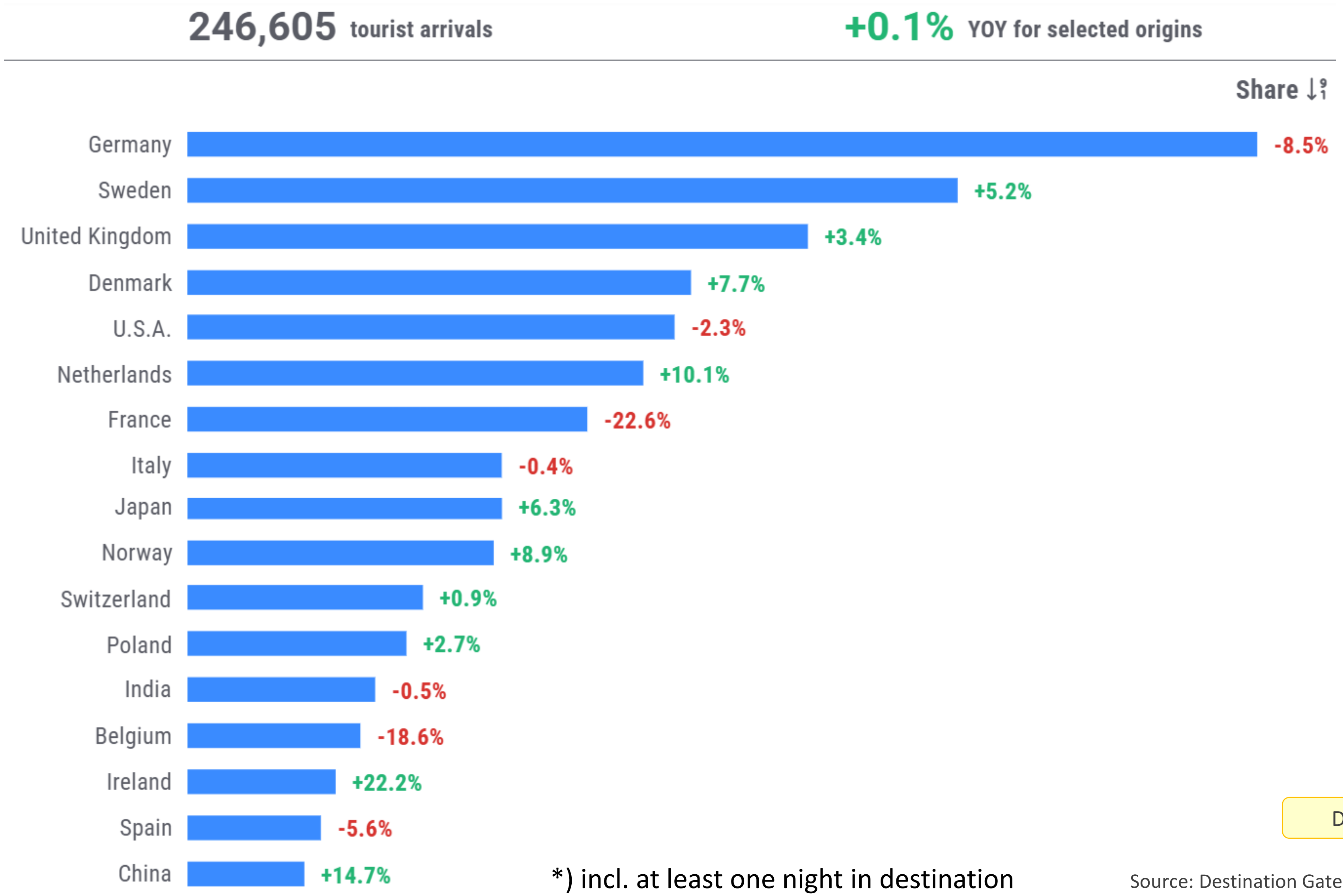
Database update 11-Jan

*) incl. at least one night in destination

Source: Destination Gateway by Amadeus/ForwardKeys

Forecast of Flight arrivals* in Finland in Mar-May 2026

Comparison to previous spring



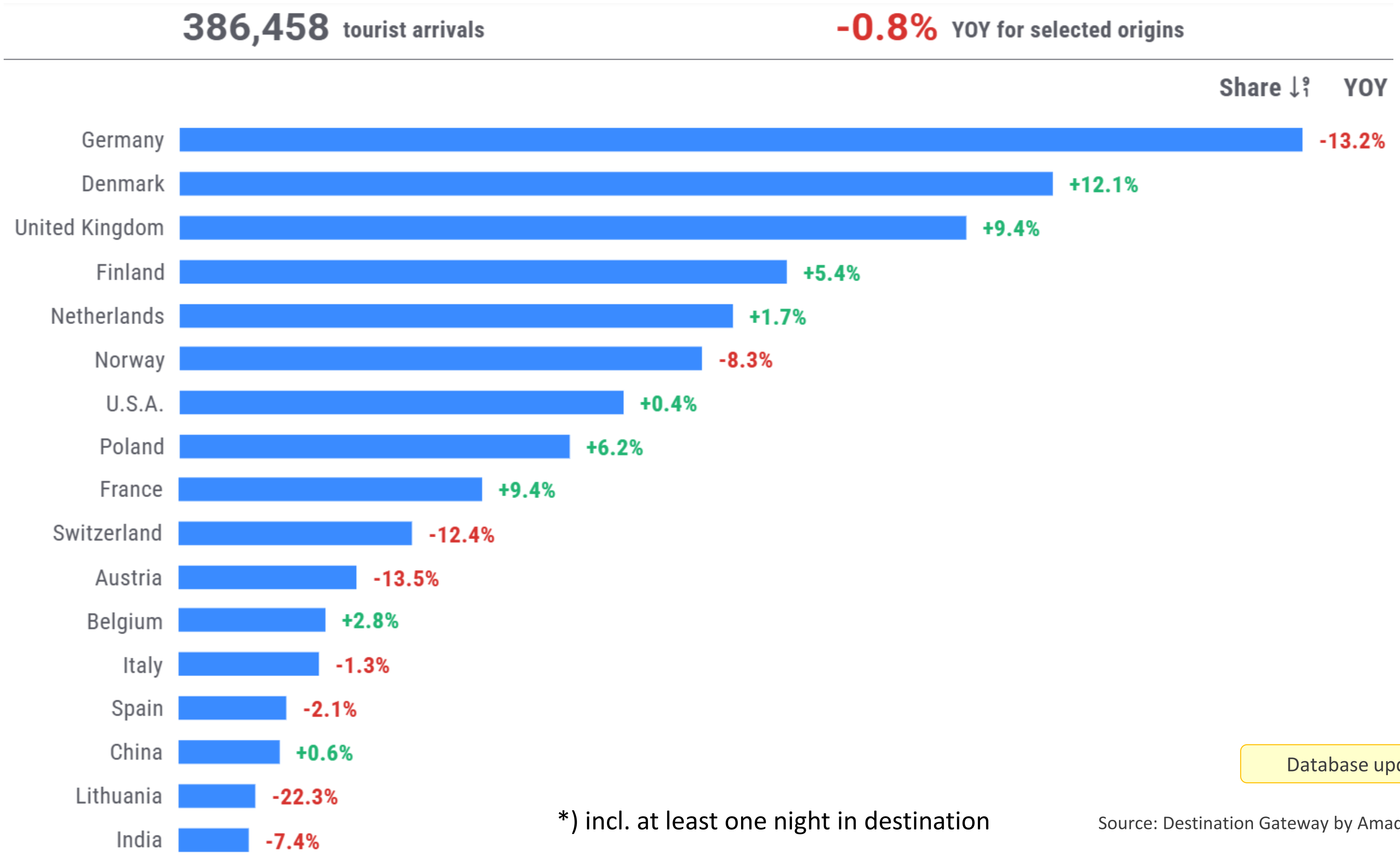
Database update 11-Jan

*) incl. at least one night in destination

Source: Destination Gateway by Amadeus/ForwardKeys

Forecast of Flight arrivals* in Sweden in Mar-May 2026

Comparison to previous spring



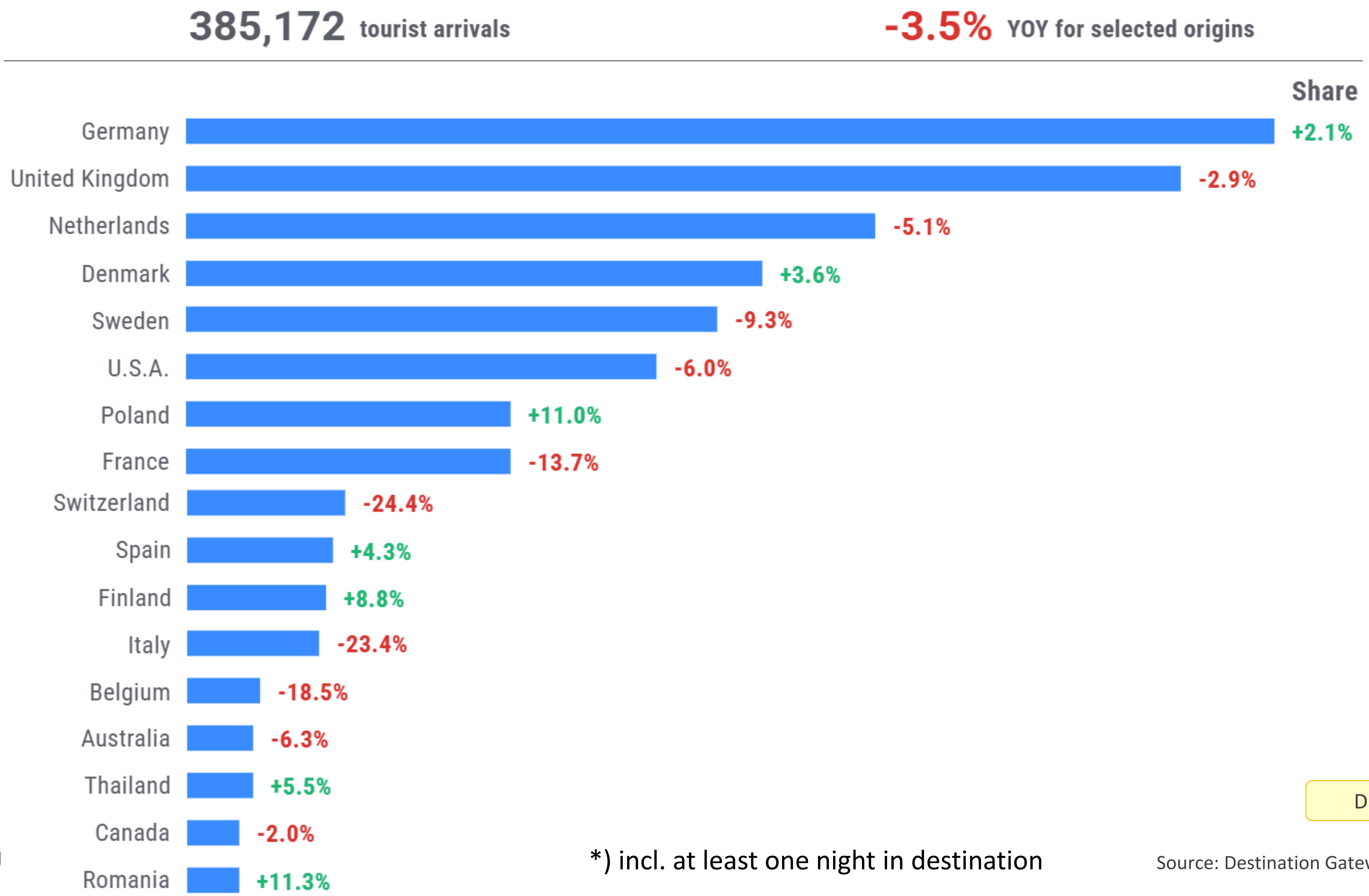
Database update 11-Jan

*) incl. at least one night in destination

Source: Destination Gateway by Amadeus/ForwardKeys

Forecast of Flight arrivals* in Norway in Mar-May 2026

Comparison to previous spring



Database update 11-Jan

*) incl. at least one night in destination

Source: Destination Gateway by Amadeus/ForwardKeys

Forecast for total int’l arrivals* to Finnish airports during Mar-May 2026

FINLAND 246,605 tourist arrivals +0.1% YOY

*) incl. at least one night in destination

Arrival destination	Forecast of Arrivals* Mar-May 2026	Share of int’l arrivals	Change vs. Mar-May 2025	Main source markets Mar-May 2026
Helsinki	**184,100**	**75%**	**+2%**	SE, DE, US, DK, UK
Rovaniemi	28,100	11%	-7%	UK, IT, DE, FR, IE
Kittilä	12,700	5%	-16%	DE, NL, FR, CH
Ivalo	4,800	2%	-15%	DE, FR, NL, UK
Turku	4,400	2%	**+28%**	PL, RO, SE, LT
Vaasa	3,900	2%	**+35%**	SE
Kuusamo	2,500	1%	**+6%**	DE
Oulu	2,400	1%	-15%	DE, SE
Kuopio	1,000	-	**+4%**	DE

Forecast of the number of arrivals* is less than 1,000 pax:
Tampere, Kajaani, Joensuu, Kokkola/Pietarsaari, Jyväskylä, Mariehamn, Pori, and Kemi/Tornio

Database update 11-Jan

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Source: Destination Gateway by Amadeus/ForwardKeys

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