



# China Market Update Webinar

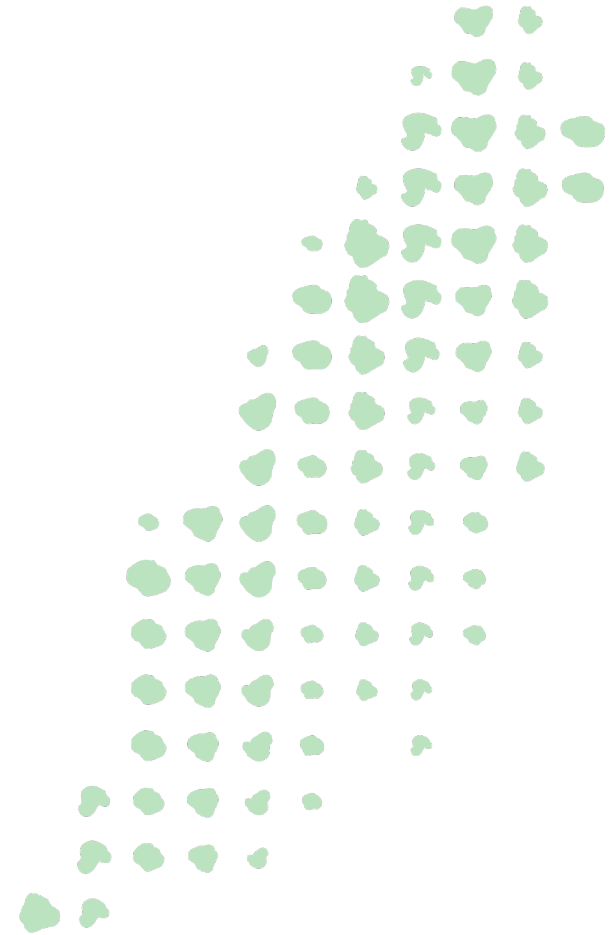
May 2026



Visit Finland

# Agenda

- Welcome
- China market overview
- Market insights
  - China 2025 statistics
  - Winter season DEC25 – FEB26
  - Summer outlook
- Industry update and consumer trends
- 2027 planning



# China market overview













## Summary of Economic Outlook, % change\*

Country	2024					2025				
	GDP	Consumer expenditure	Unemployment**	Exchange rate***	Inflation	GDP	Consumer expenditure	Unemployment**	Exchange rate***	Inflation
UK	1.1%	-0.2%	4.4%	2.7%	2.5%	1.4%	0.9%	4.4%	-1.2%	3.4%
France	1.1%	1.0%	7.2%	0.0%	2.0%	0.9%	0.5%	7.5%	0.0%	1.0%
Germany	-0.5%	0.5%	6.0%	0.0%	2.3%	0.2%	1.0%	6.3%	0.0%	2.2%
Netherlands	1.1%	1.0%	3.7%	0.0%	3.3%	1.6%	1.5%	3.9%	0.0%	3.3%
Italy	0.5%	0.6%	6.6%	0.0%	1.0%	0.6%	0.8%	6.2%	0.0%	1.6%
Spain	3.5%	3.1%	11.3%	0.0%	2.8%	2.9%	3.4%	10.6%	0.0%	2.7%
Russia	4.3%	5.4%	2.5%	-8.0%	8.4%	0.5%	2.6%	2.3%	5.9%	8.9%
US	2.8%	2.9%	4.0%	-0.1%	3.0%	2.0%	2.6%	4.3%	-4.3%	2.8%
Canada	2.0%	2.2%	6.4%	-1.6%	2.4%	1.7%	2.1%	6.8%	-6.2%	2.0%
Brazil	3.0%	5.1%	6.8%	-7.4%	4.4%	2.6%	1.3%	6.0%	-7.5%	5.0%
China	5.0%	4.9%	3.3%	-1.7%	0.2%	4.8%	3.9%	3.9%	-4.3%	-0.1%
Japan	-0.2%	-0.3%	2.5%	-7.2%	2.7%	1.3%	1.2%	2.5%	-3.0%	3.1%
India	6.7%	7.3%	8.0%	-1.4%	4.9%	7.7%	7.1%	7.3%	-7.8%	2.0%

Source: Tourism Economics based on GEM as of 08.12.2025

\* Unless otherwise specified

\*\* Percentage point change

\*\*\* Exchange rates measured against the euro. A positive change indicates stronger local currency against the euro and therefore a positive impact on outbound tourism demand. A negative change indicates weaker local currency against the euro and therefore a negative impact on outbound tourism demand.

# Why this market?

World Largest Source of Tourists --- 150 million trips, 13.7%+, record high

Largest Spending --- 253 Billion USD tourism import, 17.5%+, 15.2%🌍

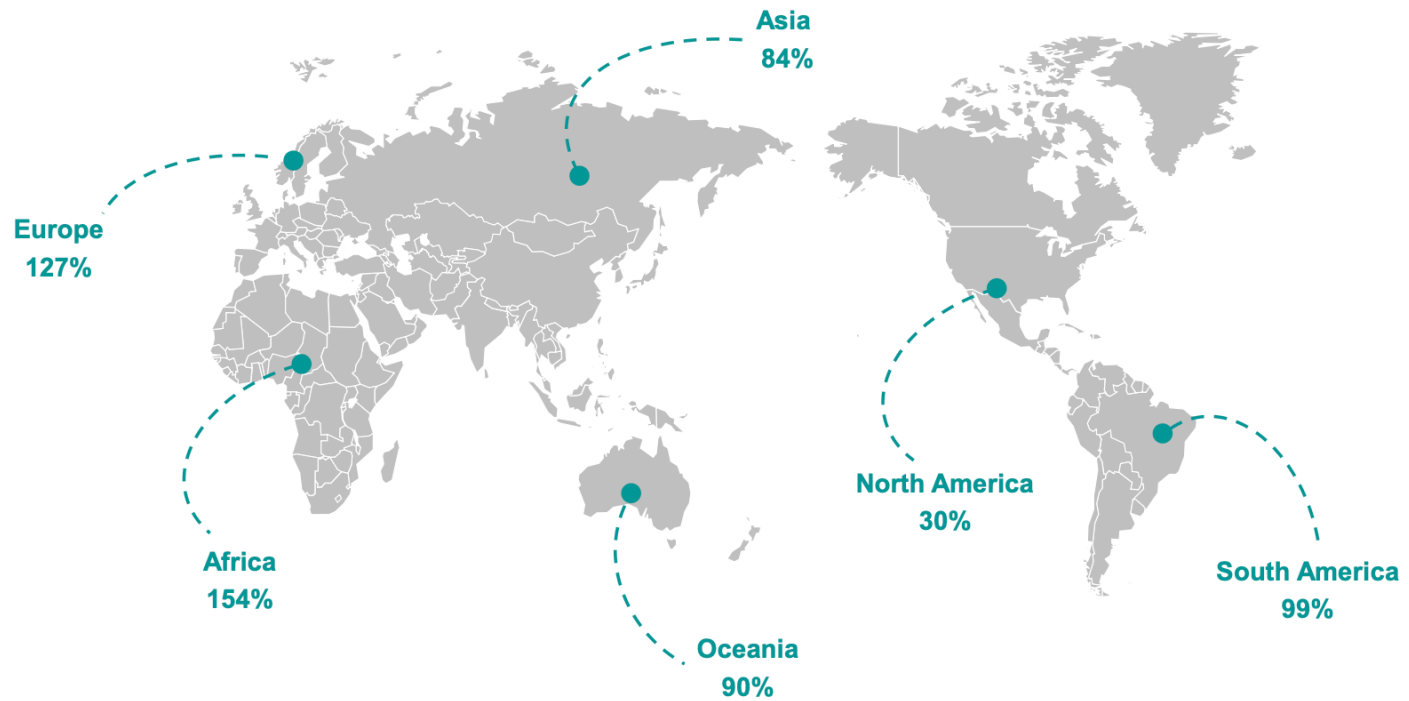
Gen Z , Middle-class families and Boomers--- three top pillars

Section 1: The Big News

## The recovery level of outbound flights to different continents varies

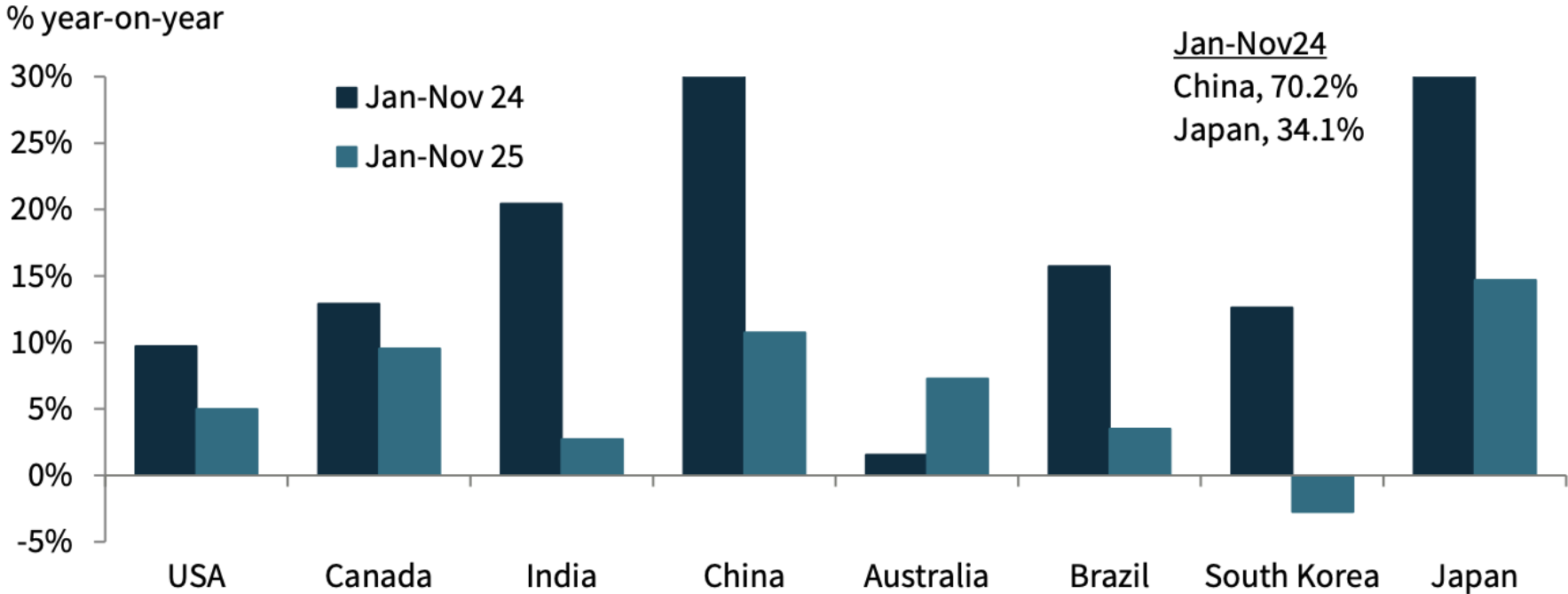
### Flight Recovery by Continent

Recovery Rate = Number of Seats in March 2026 / Number of Seats in March 2019



1. Seats on scheduled outbound flights from mainland China to HK, Macao, & Taiwan are included.  
Source: OAG, Travel Link Analysis

# Inbound trips to Europe by selected long-haul source markets (% year)



# 2026 Flight Connection

## **Finnair, AY**

Shanghai – Helsinki, 4 flights weekly  
Hongkong – Helsinki, 7 flights weekly



## **JuneYao Airlines, HO**

Shanghai – Helsinki, 5 flights weekly  
(7 flights weekly from July)



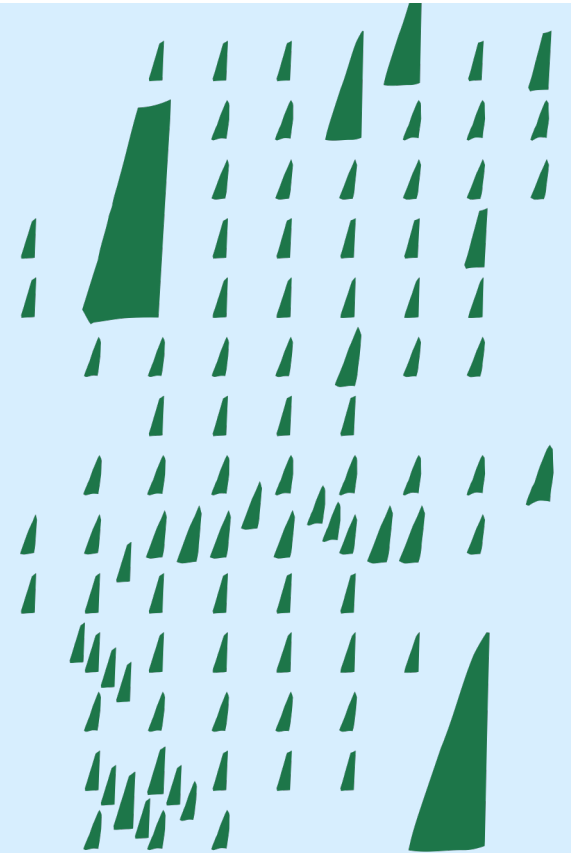
## **China Southern Airlines, CZ**

Beijing Daxing – Helsinki, 3 flights weekly  
(7 flights weekly from June 20)



# Market insights

# Greater China 2025 statistics

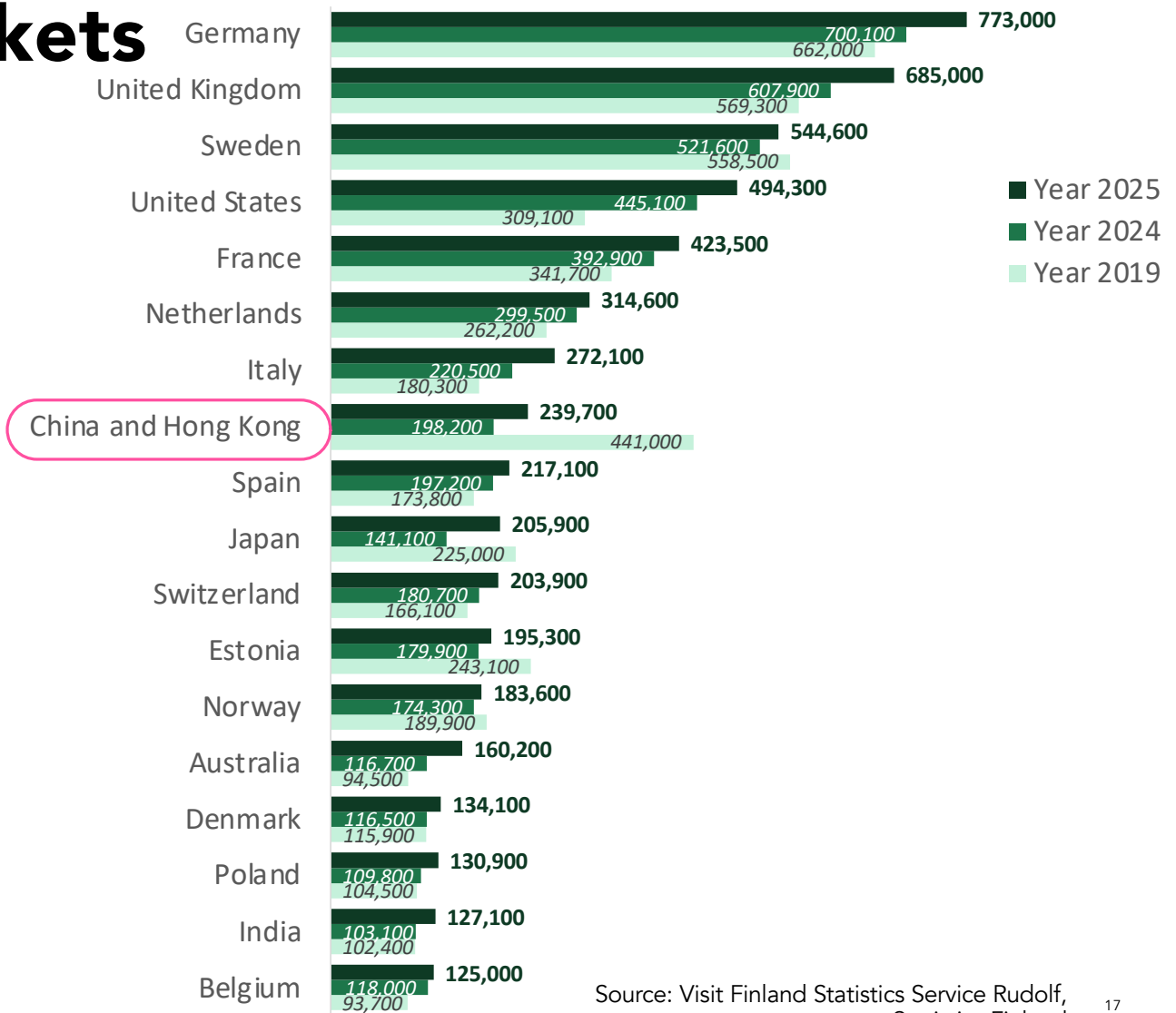


# Main source markets in 2025

**239,700 Chinese**

registered overnight stays in 2025  
**+21%** compared to 2024  
*(-46% compared to 2019)*

Chinese overnight stays in Finland maintained their consistent growth in 2025. However, with flight connectivity still well below 2019 levels, the number of overnights remained clearly lower than in 2019.



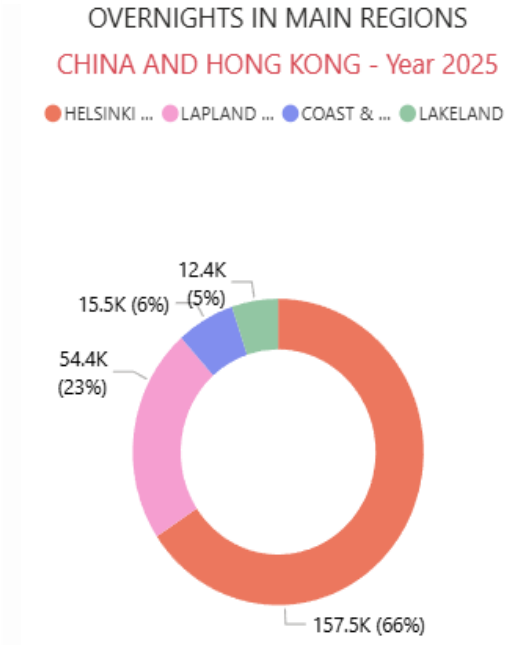
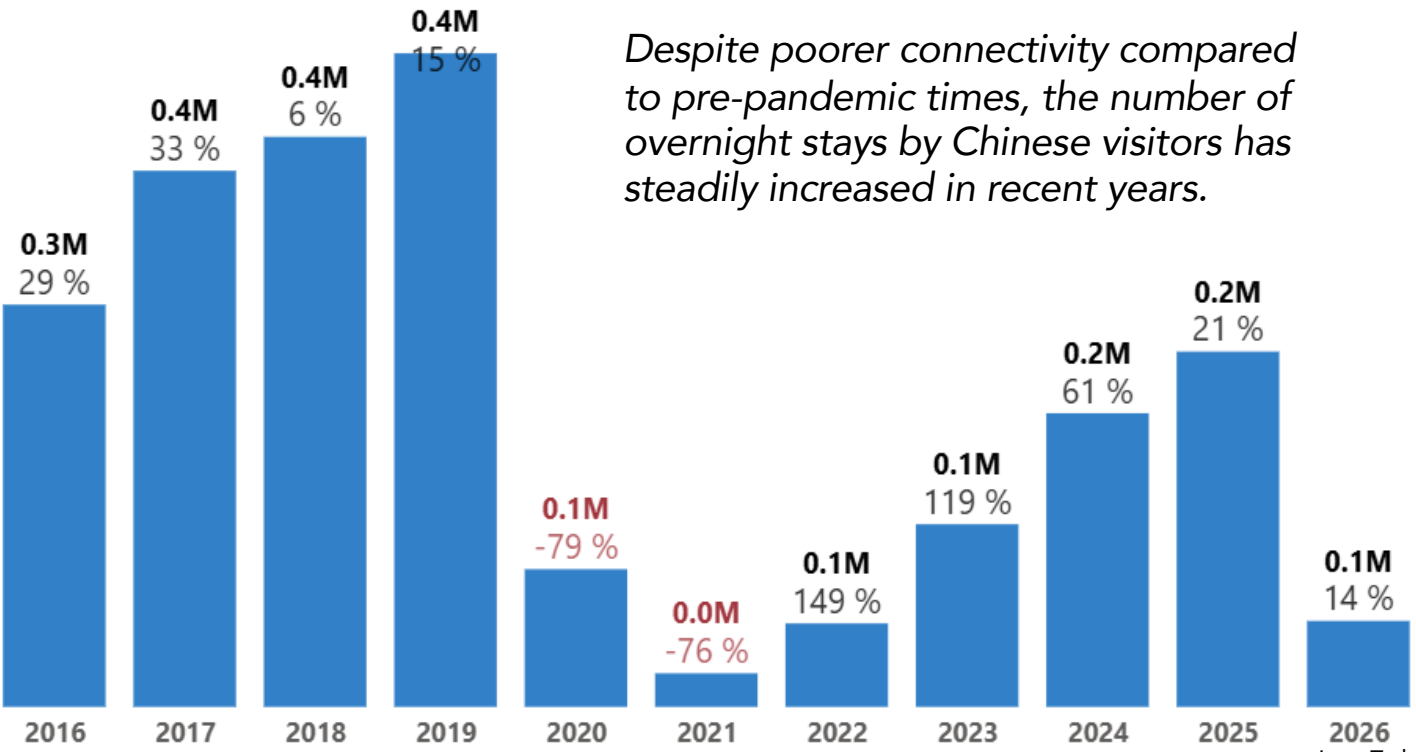
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

# Chinese overnights in Finland 2016-2025 & Jan-Feb 2026

NO. OF OVERNIGHTS IN FINLAND AND YoY CHANGE %

## CHINA AND HONG KONG

*Despite poorer connectivity compared to pre-pandemic times, the number of overnight stays by Chinese visitors has steadily increased in recent years.*

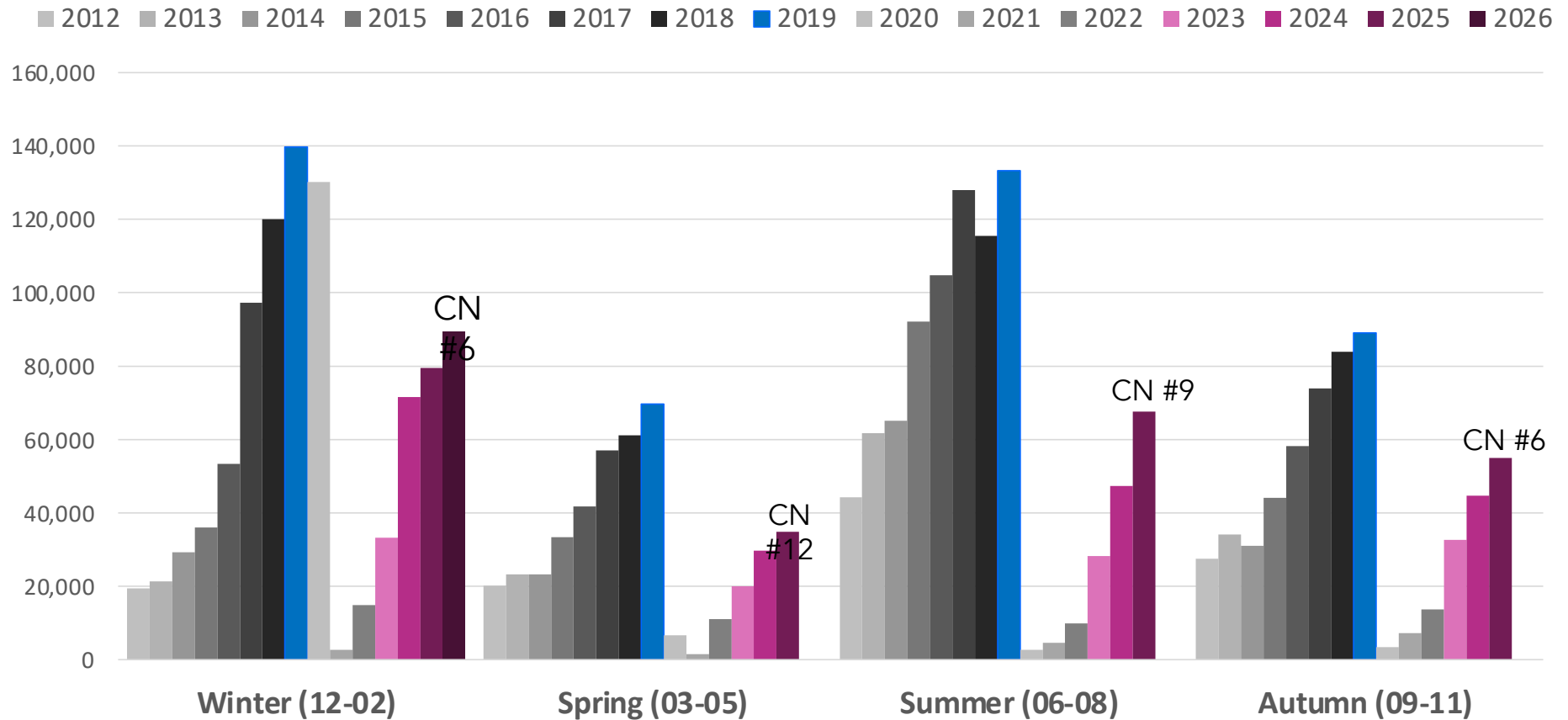


In 2025, almost 70% of Chinese visitors' overnight stays took place in the **Helsinki region**, showing a significant increase of **34%** from the previous year.



[Link to the report: Accommodation statistics](#)

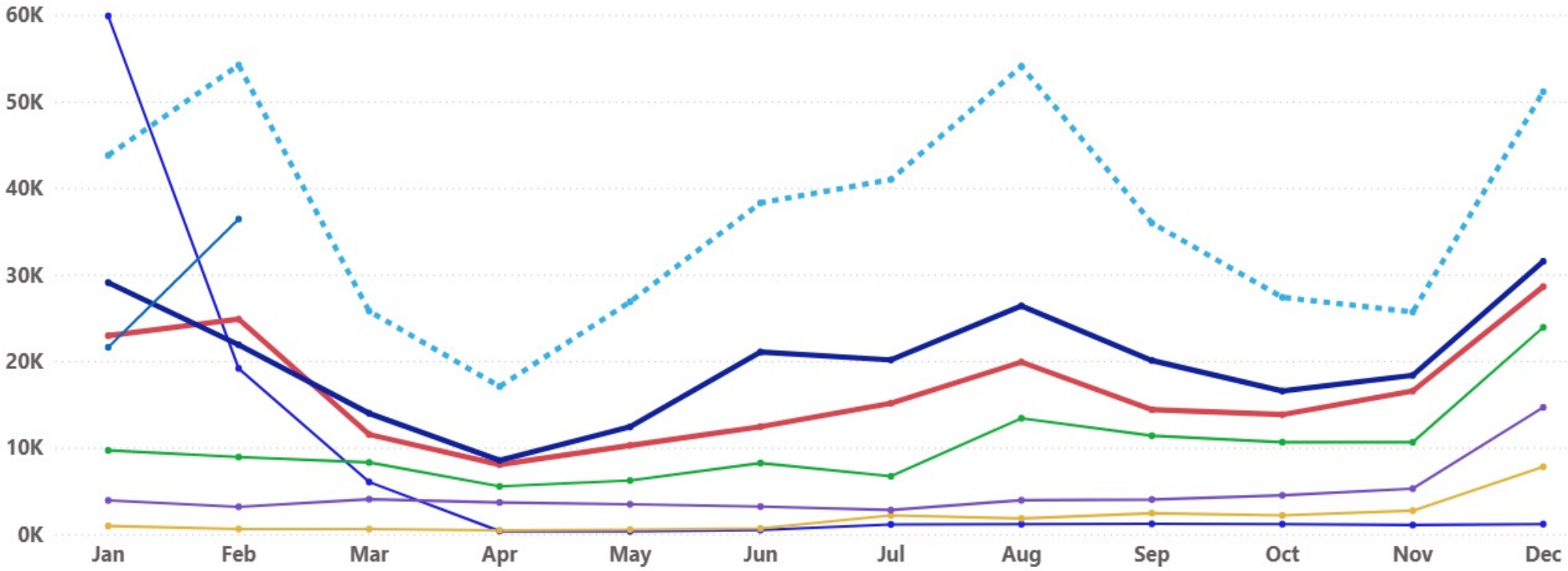
# Chinese – Seasonal Overnights in Finland 2012-2026



# Chinese monthly overnights in Finland 2019–2025 & Jan-Feb 2026

NO. OVERNIGHTS IN FINLAND BY MONTH  
CHINA AND HONG KONG

● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025 ● 2026



[Link to the report: Accommodation statistics](#)

# Overnights in high summer season 2025

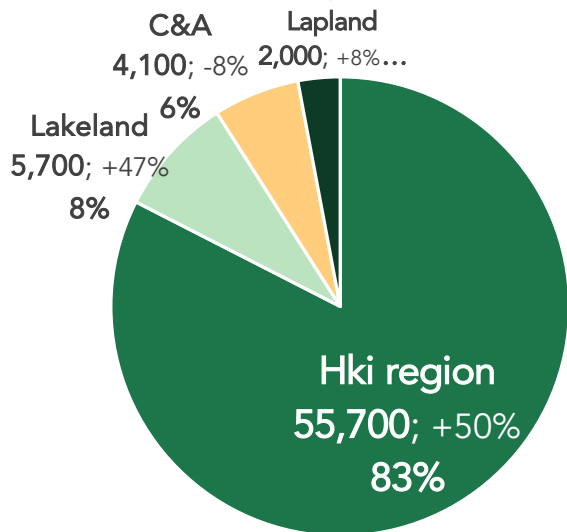
And change compared to summer 2024 & pre-pandemic

**2.1M** foreign overnights

(+13% vs. summer 2024 & -5% vs. summer 2019)

- **1.3M** from EU-27 + UK (+14% & +10%)
- **252,500** from Asia (+27% & -27%)
- **236,100** from America (+16% & +48%)

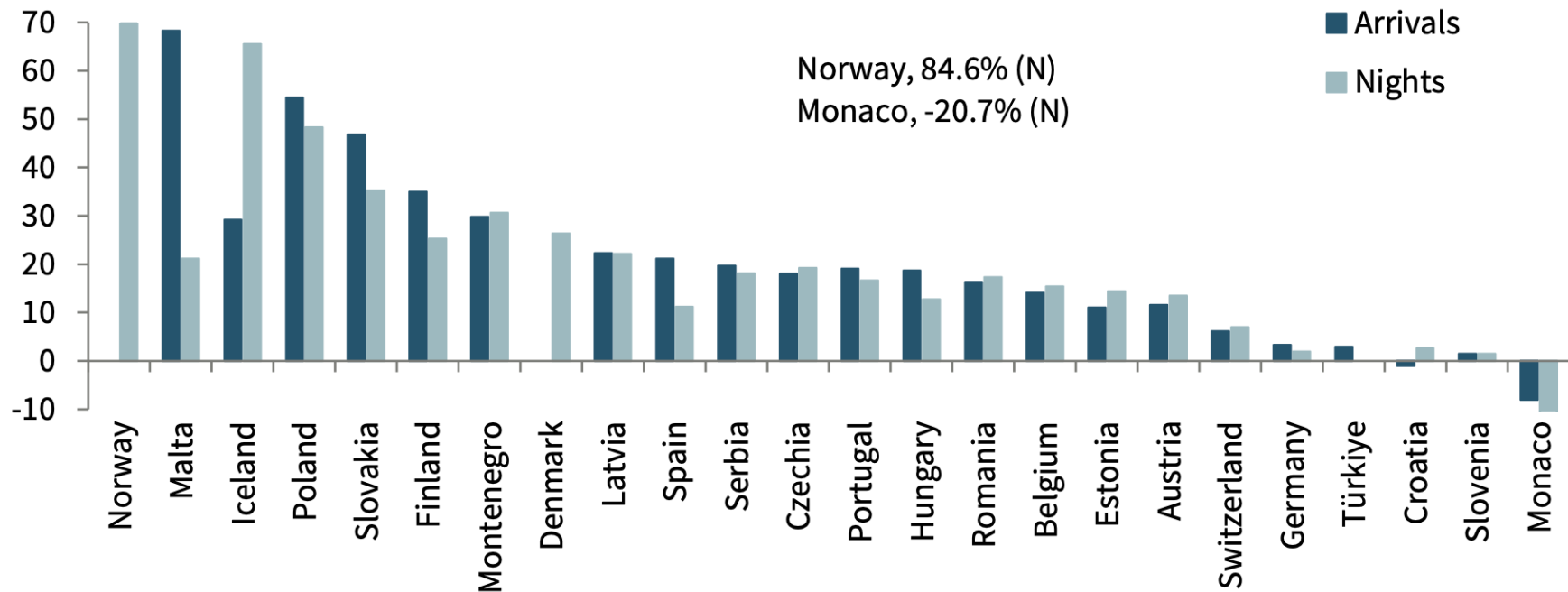
Chinese overnights / summer 2025



	Jun-Aug 2019	Jun-Aug 2024	Jun-Aug 2025	2025 vs. 2019	2025 vs. 2024
Germany	270 300	251 500	<b>284 700</b>	+5 %	<b>+13 %</b>
Sweden	255 200	242 300	<b>243 800</b>	-5 %	<b>+1 %</b>
USA	109 900	157 900	<b>177 800</b>	+62 %	<b>+13 %</b>
UK	90 800	87 700	<b>110 900</b>	+22 %	<b>+26 %</b>
Italy	68 200	65 600	<b>86 300</b>	+27 %	<b>+32 %</b>
Norway	73 400	76 800	<b>76 000</b>	+4 %	<b>-1 %</b>
France	64 100	61 400	<b>72 800</b>	+14 %	<b>+19 %</b>
Switzerland	64 400	65 200	<b>72 500</b>	+13 %	<b>+11 %</b>
<b>China &amp; Hong Kong</b>	<b>133 300</b>	<b>47 400</b>	<b>67 500</b>	<b>-49 %</b>	<b>+43 %</b>
Netherlands	62 300	59 500	<b>67 500</b>	+8 %	<b>+14 %</b>
Estonia	69 400	59 400	<b>66 000</b>	-5 %	<b>+11 %</b>
Japan	73 100	46 300	<b>63 600</b>	-13 %	<b>+37 %</b>
Spain	56 600	54 800	<b>61 200</b>	+8 %	<b>+12 %</b>
Poland	31 400	38 300	<b>46 100</b>	+47 %	<b>+20 %</b>
Denmark	37 700	36 400	<b>40 000</b>	+6 %	<b>+10 %</b>
Austria	27 900	28 900	<b>34 500</b>	+24 %	<b>+19 %</b>
Australia	27 600	25 800	<b>29 400</b>	+6 %	<b>+14 %</b>
Belgium	21 500	23 400	<b>25 200</b>	+17 %	<b>+8 %</b>
Canada	17 700	19 000	<b>25 100</b>	+42 %	<b>+32 %</b>
India	27 200	19 600	<b>22 600</b>	-17 %	<b>+15 %</b>

## Chinese visits and overnights to select destinations (% relative to 2024)

2025 year-to-date\*, % year



Source: TourMIS\* \*date varies (Jan-Dec) by destination

# Chinese registered overnights in the Nordics (excl. Iceland)

Select year for shares  
2025

Norway has experienced the quickest rebound in Chinese overnight stays.

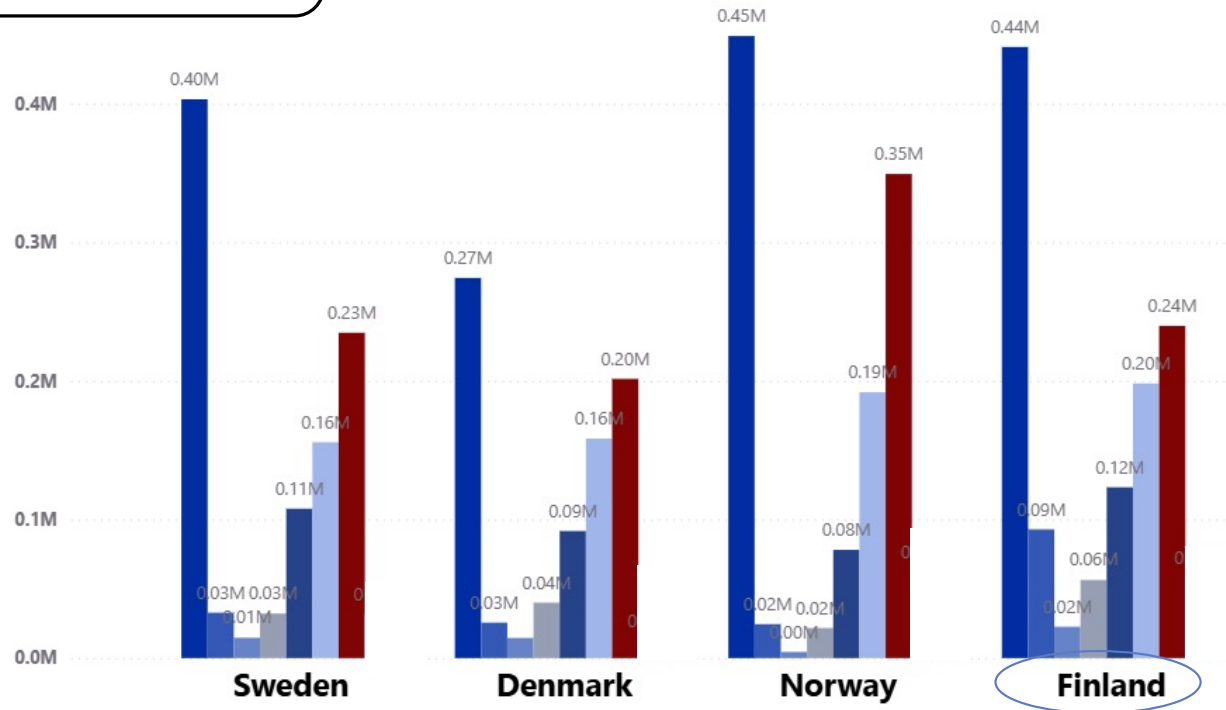
## Share of overnights

WHOLE COUNTRY Foreign China (incl. Hong Kong)



Year	Overnights	YoY change %
2025	1,025,358	46 %
2024	704,155	76 %
2023	400,808	167 %
2022	150,107	167 %
2021	56,195	-68 %
2020	175,673	-89 %
2019	1,567,577	12 %

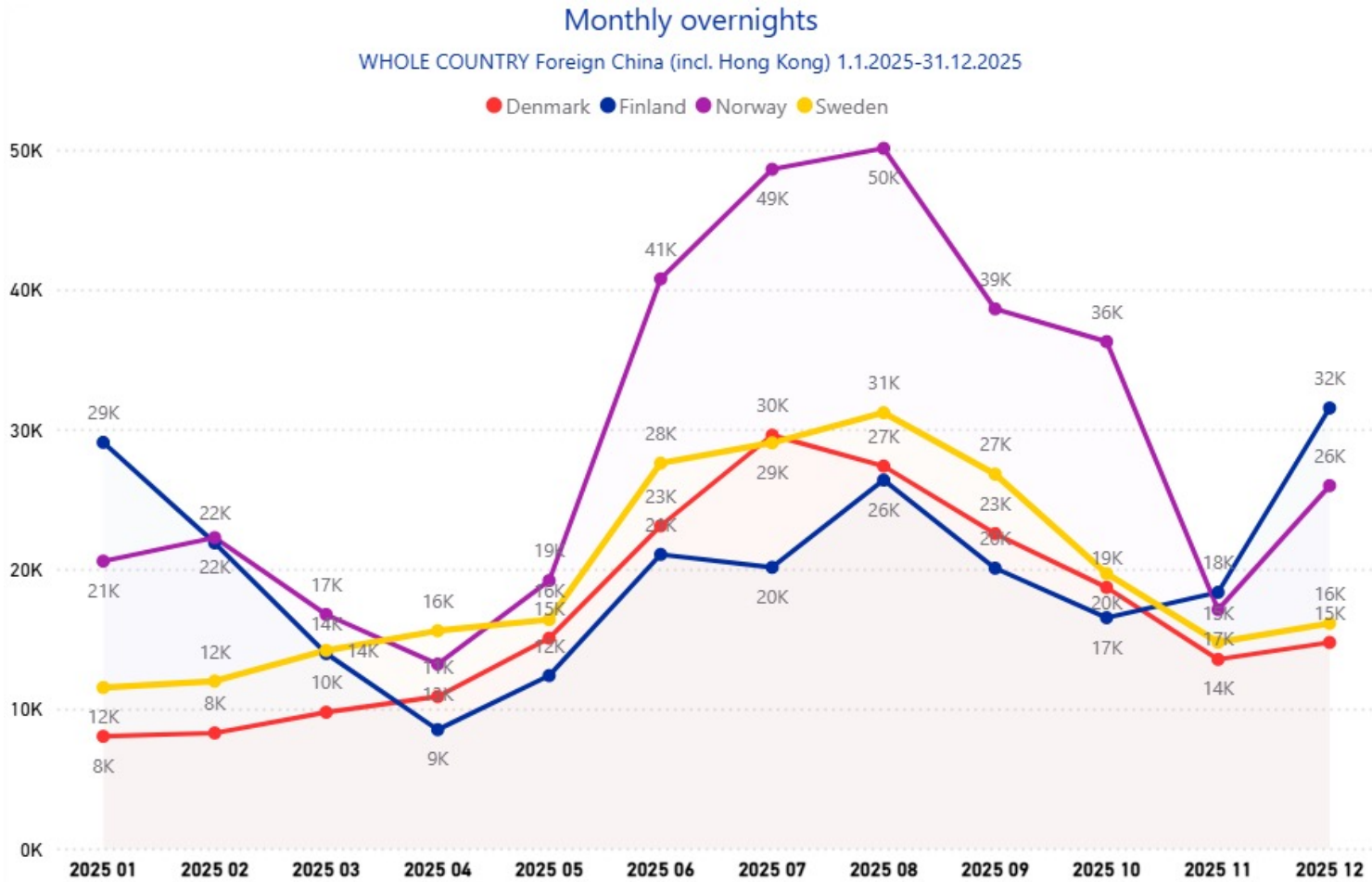
Overnights in the Nordic countries  
WHOLE COUNTRY Foreign China (incl. Hong Kong)  
● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025



## Nordic comparison

Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Sweden, Norway, Iceland, and Denmark

# Chinese monthly overnights in the Nordics in 2025

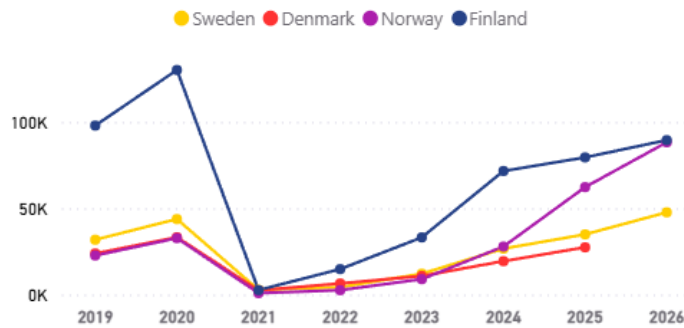


[Nordic report](#)

# China: Winter & Summer overnights in the Nordics 2025

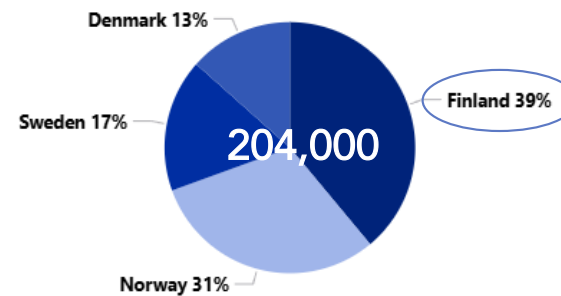
Winter (Dec-Feb)

WHOLE COUNTRY Foreign China (incl. Hong Kong)



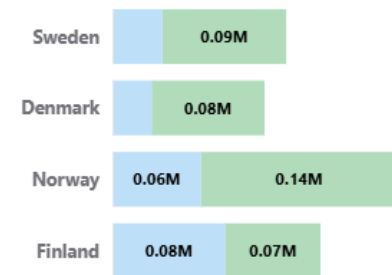
Share of overnights - winter (Dec-Feb)

2025



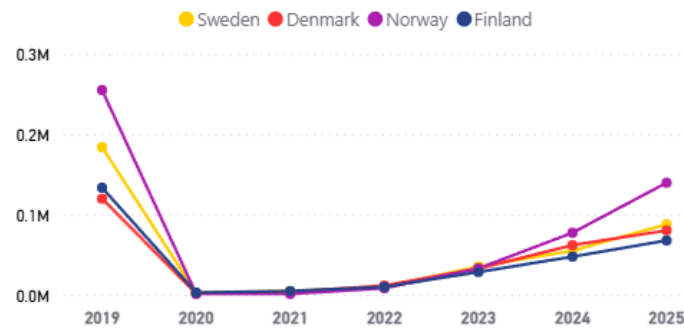
Overnights in winter & summer

WHOLE COUNTRY Foreign China (incl. Hong Kong)



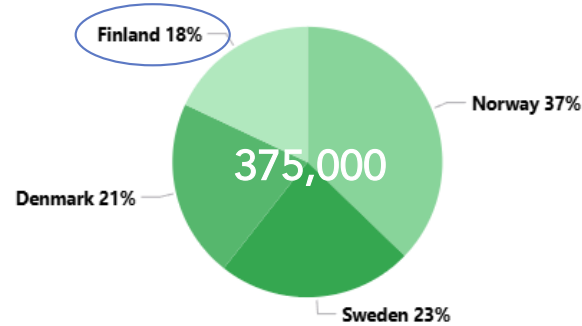
Summer (Jun-Aug)

WHOLE COUNTRY Foreign China (incl. Hong Kong)



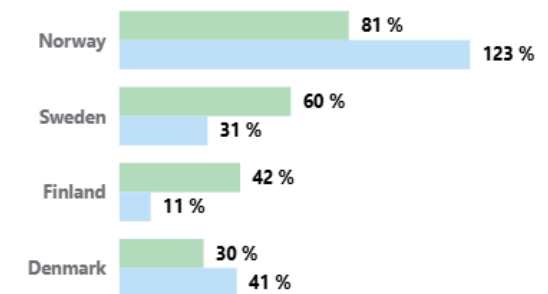
Share of overnights - summer (Jun-Aug)

2025



YoY change in seasonal overnights %

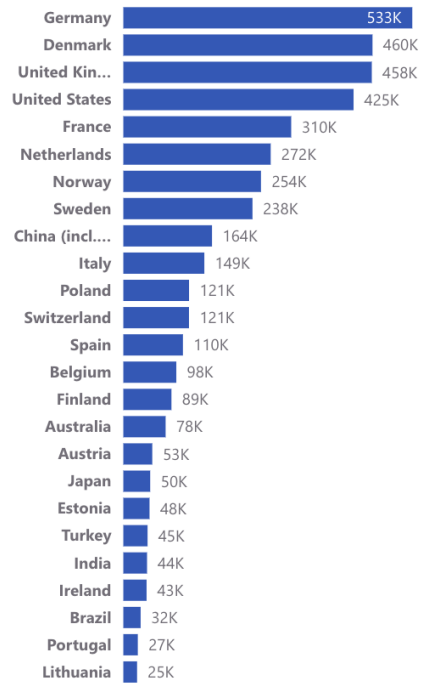
WHOLE COUNTRY Foreign China (incl. Hong Kong)



Year: Latest    
 Year/Month: All    
 Nordic country: Multiple selections    
 Nordic region: WHOLE COUNTRY    
 Country: All

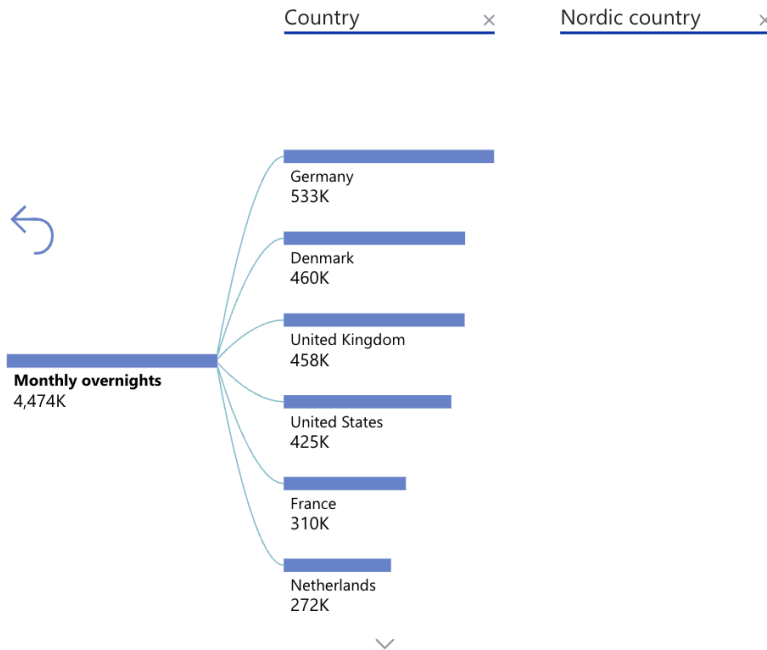
### Visiting countries overnights

WHOLE COUNTRY 1.1.2026-28.2.2026



### Visiting country / Nordic country

WHOLE COUNTRY 1.1.2026-28.2.2026



Monthly overnight statistics for Iceland include hotels & guest houses only.

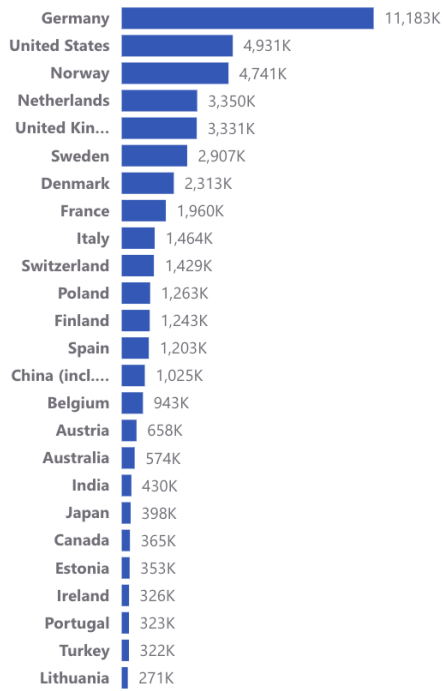
Sources: Visit Finland Rudolf Data Base, Statistics Finland; Statistics Sweden; Statistics Norway; Statistics Denmark; Statistics Iceland

## VISITING COUNTRY & REGION SPLIT

Year: 2025  
 Year/Month: All  
 Nordic country: Multiple selections  
 Nordic region: WHOLE COUNTRY  
 Country: All

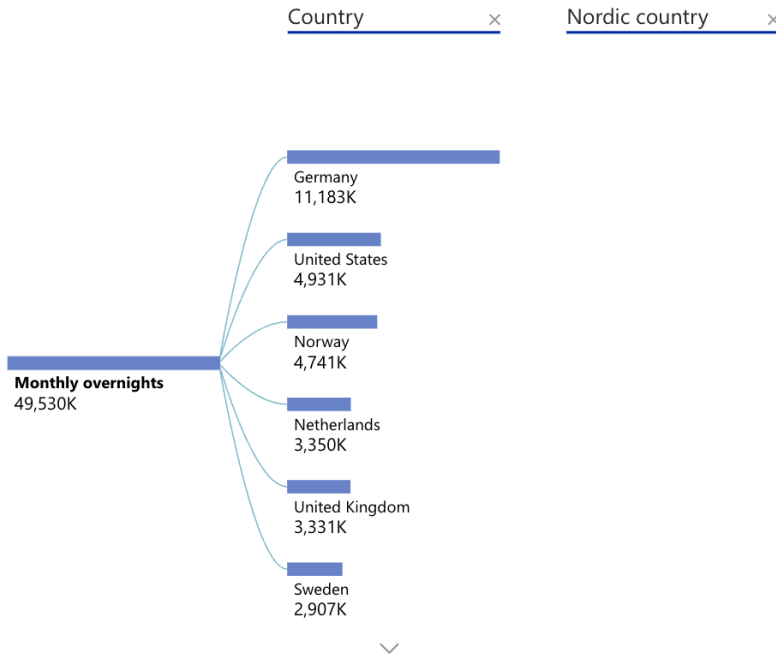
### Visiting countries overnights

WHOLE COUNTRY 1.1.2025-31.12.2025



### Visiting country / Nordic country

WHOLE COUNTRY 1.1.2025-31.12.2025



Monthly overnight statistics for Iceland include hotels & guest houses only.

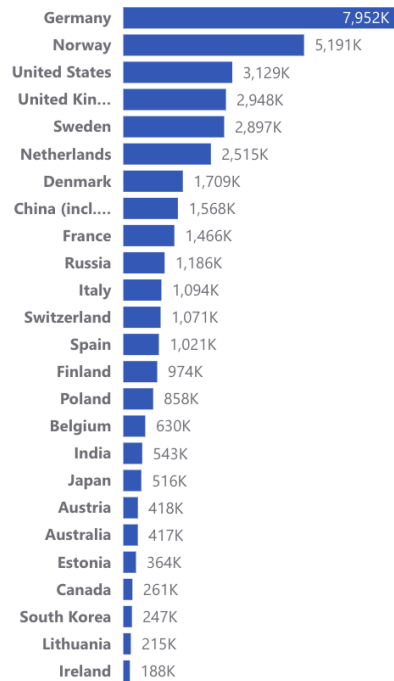
Sources: Visit Finland Rudolf Data Base, Statistics Finland; Statistics Sweden; Statistics Norway; Statistics Denmark; Statistics Iceland

## VISITING COUNTRY & REGION SPLIT

Year: 2019  
 Year/Month: All  
 Nordic country: Multiple selections  
 Nordic region: WHOLE COUNTRY  
 Country: All

### Visiting countries overnights

WHOLE COUNTRY 1.1.2019-31.12.2019



### Visiting country / Nordic country

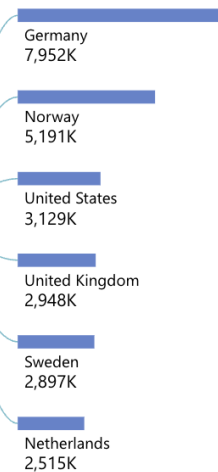
WHOLE COUNTRY 1.1.2019-31.12.2019



Country x Nordic country x



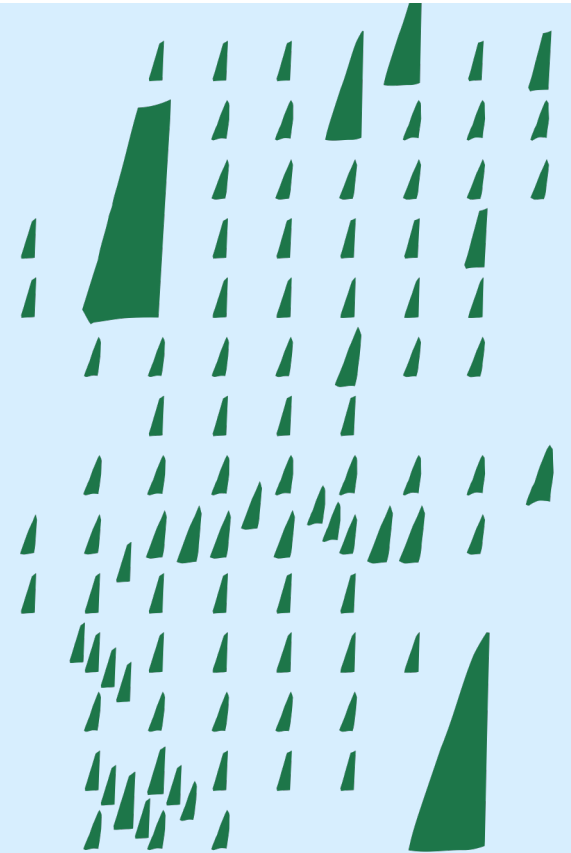
Monthly overnights  
41,152K



Monthly overnight statistics for Iceland include hotels & guest houses only.

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

# Winter season DEC25 – FEB26



# Foreign overnights in winter high season 2025-2026

And change compared to winters 2024-2025 & (2018-2019) **High winter season (12-02)**

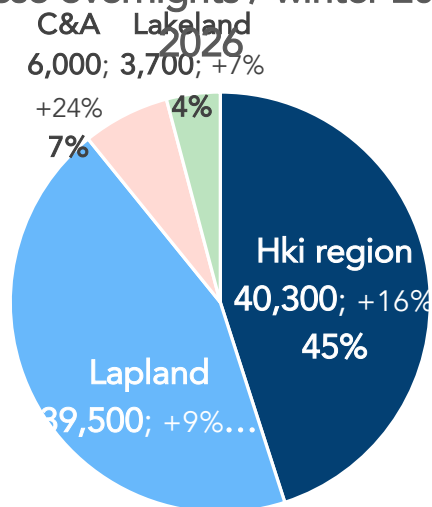
**2.4M** foreign overnights

**+6%** vs. winter 2024-2025

(+18% vs. winter 2018-2019)

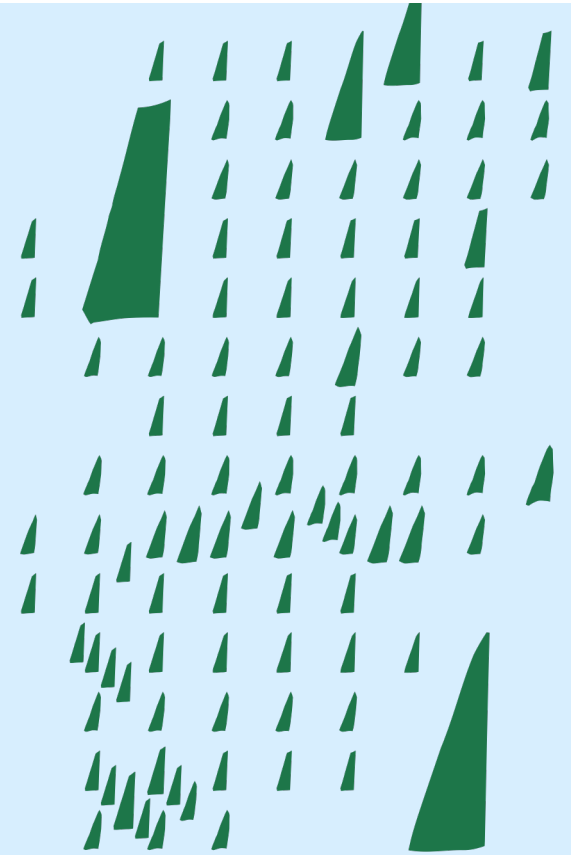
- 1.6M from EU-27 + UK / **+6%** (+36%)
- 387,200 from Asia / **+8%** (+14%)
- 170,400 from America / **+17%** (+134%)

Chinese overnights / winter 2025-



	winter 2019	winter 2025	winter 2026	winter 2026 vs. 2019	winter 2026 vs. 2025
UK	334 900	379 900	<b>404 400</b>	+21 %	<b>+6 %</b>
Germany	151 300	199 400	<b>230 600</b>	+53 %	<b>+16 %</b>
France	161 700	234 000	<b>205 700</b>	+27 %	<b>-12 %</b>
Netherlands	106 700	149 300	<b>142 400</b>	+34 %	<b>-5 %</b>
USA	53 800	103 800	<b>114 300</b>	+113 %	<b>+10 %</b>
<b>China &amp; Hong Kong</b>	<b>139 700</b>	<b>79 500</b>	<b>89 500</b>	<b>-36 %</b>	<b>+13 %</b>
Italy	42 900	74 800	<b>83 500</b>	+95 %	<b>+12 %</b>
Spain	59 400	73 900	<b>82 400</b>	+39 %	<b>+12 %</b>
Australia	32 600	61 200	<b>80 800</b>	+148 %	<b>+32 %</b>
Sweden	75 100	68 500	<b>76 200</b>	+2 %	<b>+11 %</b>
Switzerland	51 800	68 700	<b>69 800</b>	+35 %	<b>+2 %</b>
Belgium	30 300	51 600	<b>61 600</b>	+103 %	<b>+19 %</b>
Japan	49 900	44 600	<b>54 400</b>	+9 %	<b>+22 %</b>
Estonia	58 200	47 200	<b>53 300</b>	-8 %	<b>+13 %</b>
Singapore	35 300	58 400	<b>49 600</b>	+41 %	<b>-15 %</b>
Taiwan	11 000	24 800	<b>38 100</b>	+248 %	<b>+54 %</b>
Ireland	14 900	32 700	<b>37 200</b>	+150 %	<b>+14 %</b>
India	19 000	37 500	<b>36 500</b>	+92 %	<b>-3 %</b>
Poland	21 900	31 900	<b>33 300</b>	+52 %	<b>+5 %</b>
Denmark	21 200	27 000	<b>32 700</b>	+54 %	<b>+21 %</b>

# Summer outlook

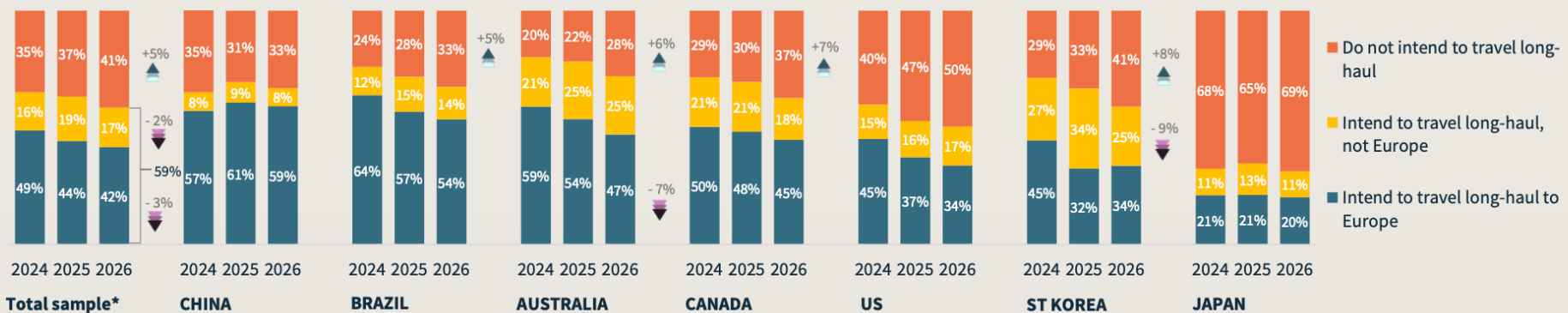


# Value and proximity reshape travel choices in 2026

- Across key overseas markets, the overall desire to take a long-haul trip in 2026 has **notably softened (-5%)**. Australians, Canadians, Brazilians, and South Koreans are noticeably less inclined to embark on long-haul journeys in 2026 compared with 2025, reflecting broader economic and behavioural shifts. Interest in visiting Europe specifically has also declined, with **42%** of respondents indicating plans for a European trip this year— down from **44%** in 2025, suggesting more cautious travel sentiment overall.
- **China** reports the strongest intention to visit Europe (**59%**), although with a small decline (-2%) from last year's outlook. The market is maturing with travellers increasingly favouring personalised, experience-driven trips and regional options, but **economic caution** may be contributing to the modest dip in intent to visit Europe.
- **Brazil** maintains strong interest in Europe (**54%**) despite a modest three-point decline from last year. **High travel costs** remain a major barrier to long-haul travel in 2026 (**68%**) for this market, likely contributing to a significant shift toward short-haul and domestic trips (**+5%**). Portugal continues to stand out as the leading European destination for Brazilians (**52%**) with increasing interest.

## Intentions for long-haul travel

Annual evolution (arrows indicate the significant YoY percentage point changes)\*



\*Minor discrepancies in totals are the result of rounding.

# Seat capacity from China to Finland for May – August 2026

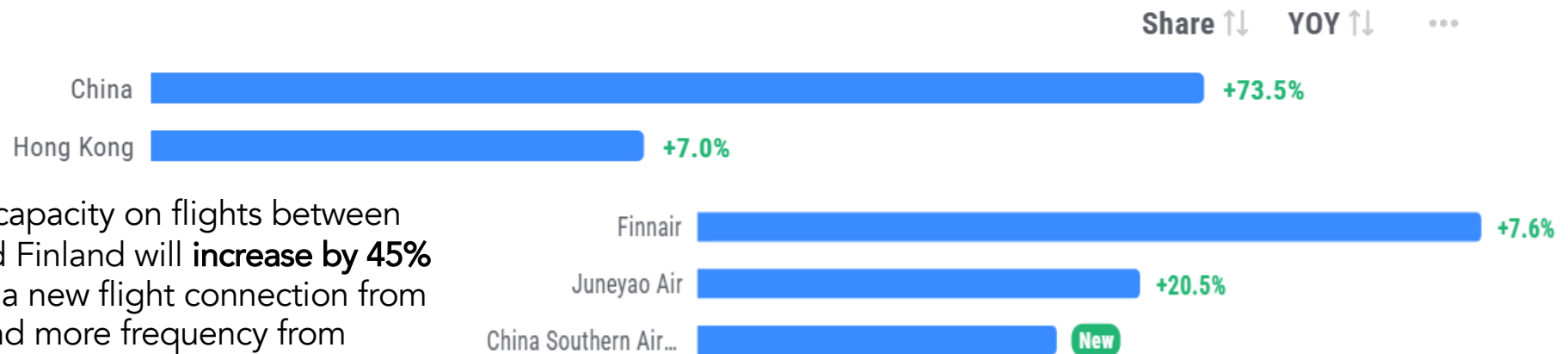
✈️ China, Hong Kong (excl. domestic) → Finland

Database update 29 Mar

Filtered period | 01 May 2026 - 31 Aug 2026

2 countries

+44.8% YOY for selected locations



The seat capacity on flights between **China** and Finland will **increase by 45%** thanks to a new flight connection from Beijing and more frequency from Shanghai.

**Finnair** will have daily flights from Hong Kong to Helsinki. It will also fly four times a week from Shanghai to Helsinki.

**Juneyao Air** will first have five weekly flights but will expand to daily flights in the end of June from Shanghai to Helsinki.

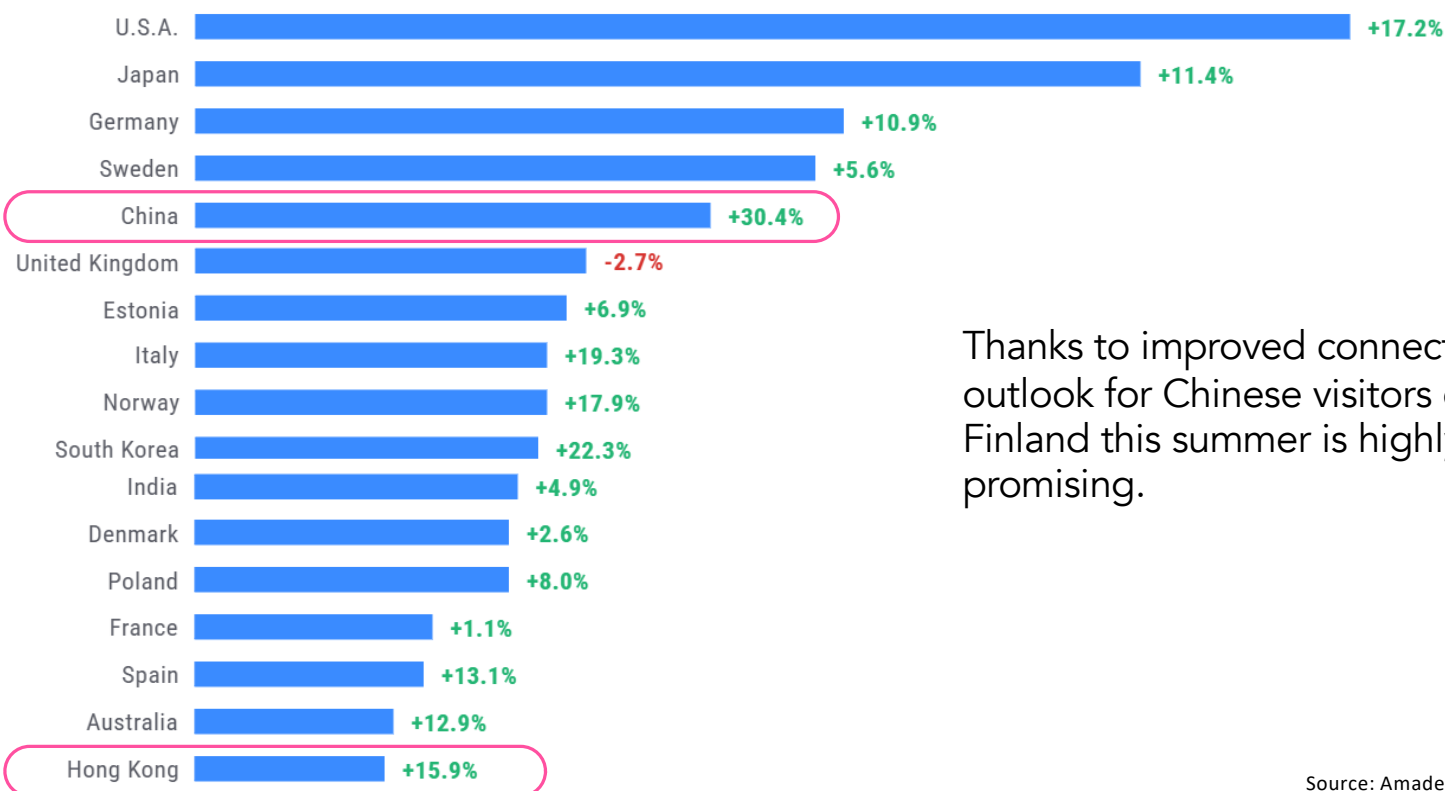
**China Southern Airlines** started with a new flight connection from Beijing Daxing airport to Helsinki the 23<sup>rd</sup> of March. It first operates three flights a week but will expand to daily flights the 22<sup>nd</sup> of June.

# Forecast for Flight arrivals in May – September 2026

Comparison to previous year

892,130 tourist arrivals

+12.8% YOY for selected origins



Thanks to improved connectivity, the outlook for Chinese visitors coming to Finland this summer is highly promising.

# Industry update and consumer trends

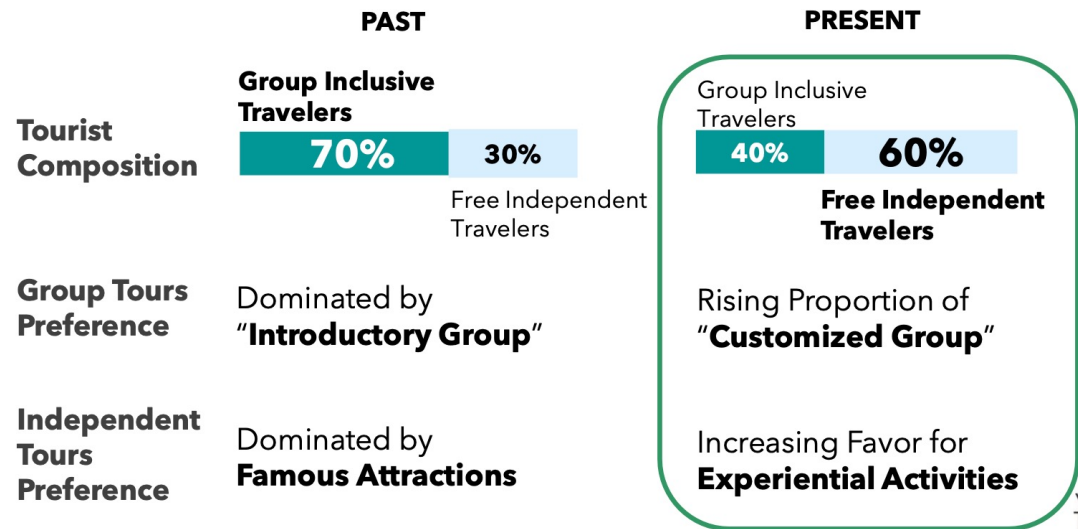
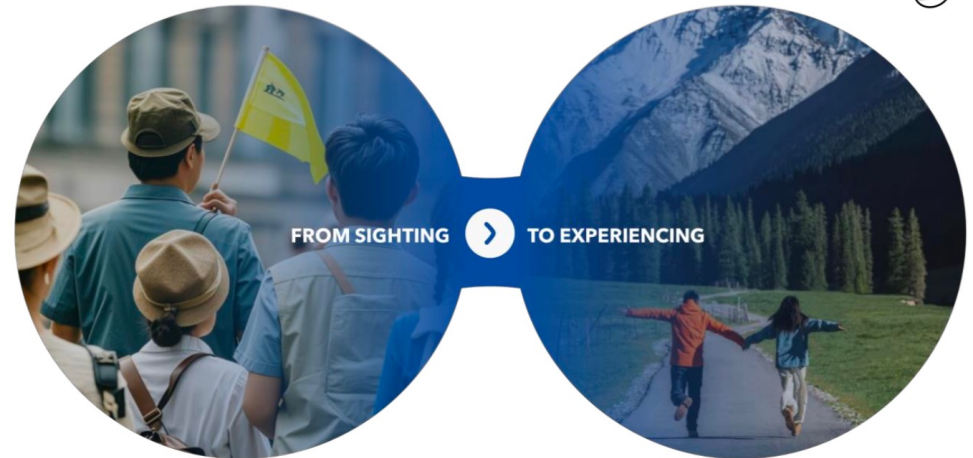
# Consumer Trends & Behaviors

- Consumption/spending – being rational
- Seeking for experience
- Niche destinations
- Tailor-made/small group
- FIT - Social Media
- AI

# Changing Travel Preferences

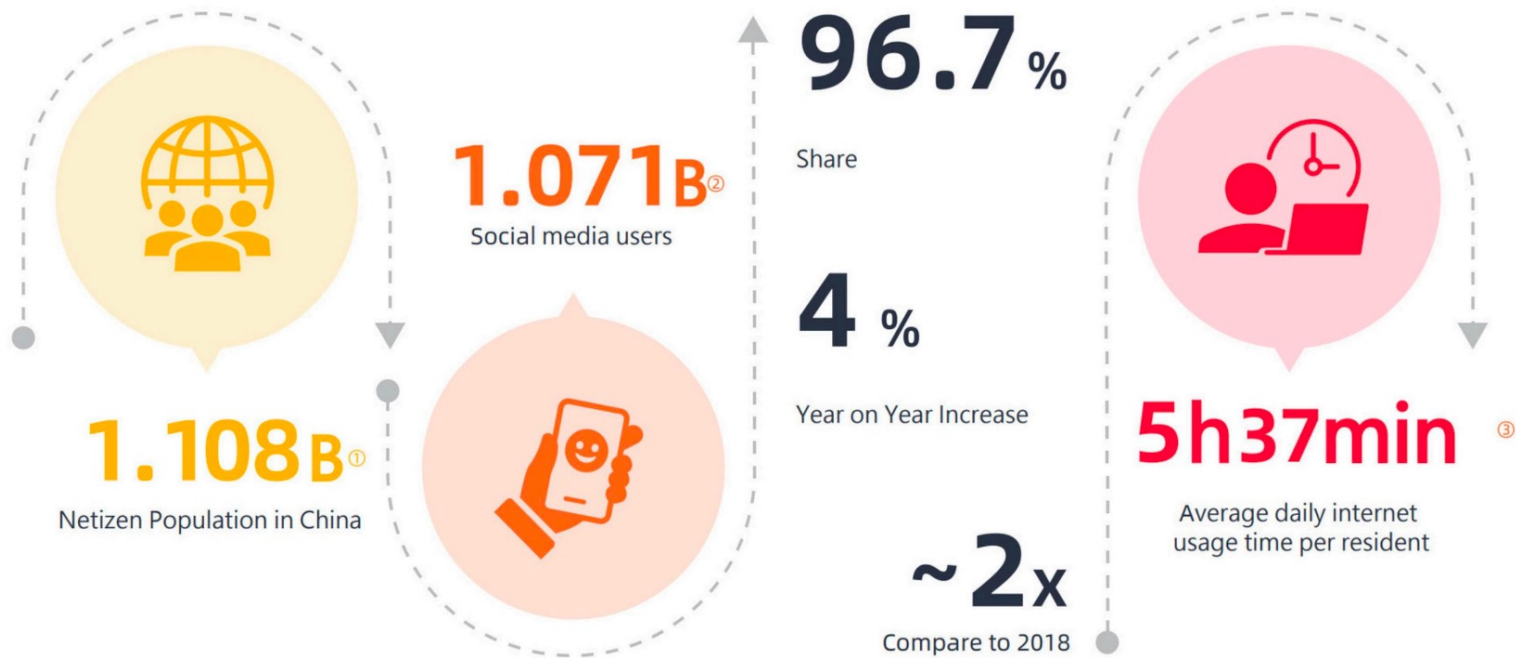
Currently, the key shift in Chinese outbound tourism consumer demand is moving from sightseeing to **experience-driven travel**

A comparison of past and present Chinese outbound tourists reveals shifting preferences, **from group tours to independent and customized experiences.**



# China's Social Media Users see Growth in Both Numbers & Usage Time

Platforms maximize user retention through algorithms and product design, while users develop dependencies in their pursuit of connection, entertainment, and escapism. The increase in social media usage stems from the combined effects of technology, design, business, and social psychology.



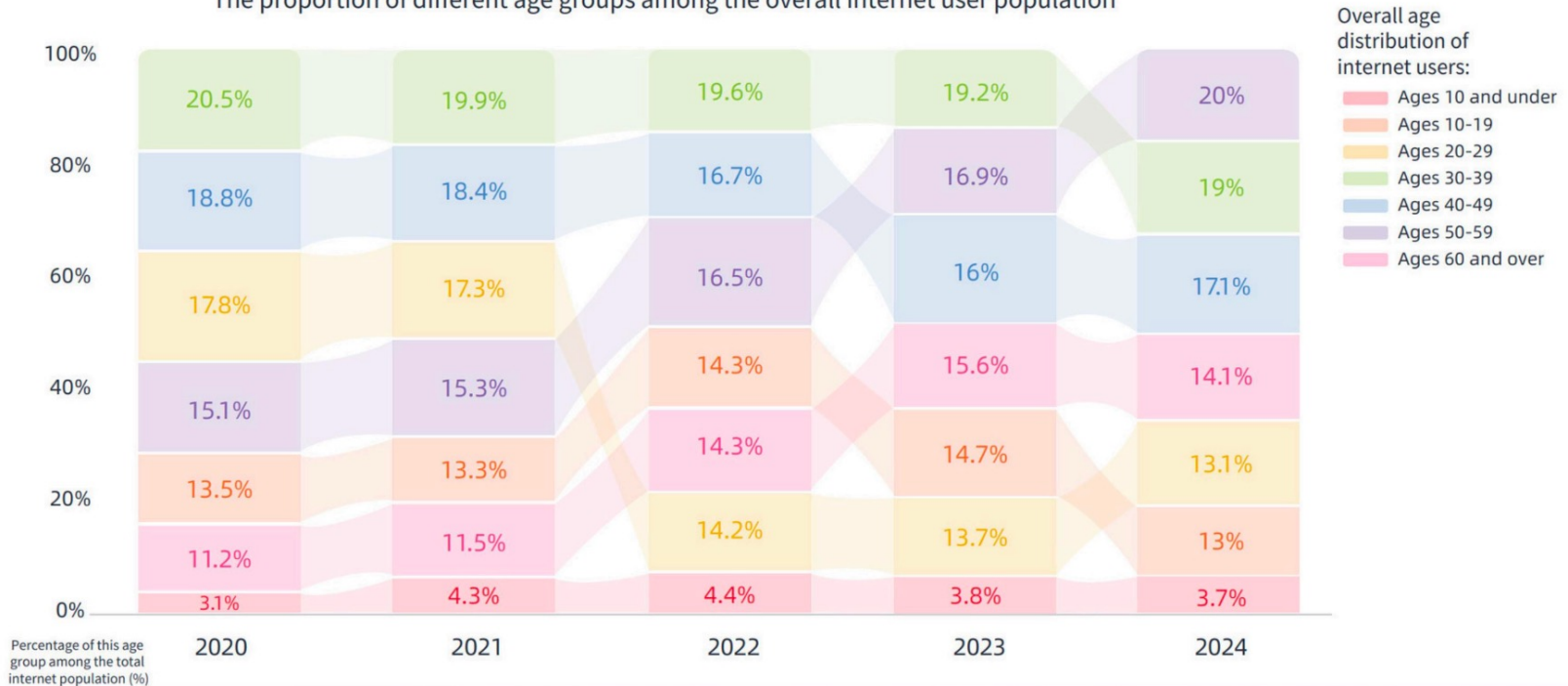
Data Sources:

① China Internet Network Information Center (CNNIC), "The 55th Statistical Report on Internet Development in China" ② QuestMobile, "2024 New Media Ecosystem Review" ③ National Bureau of Statistics (NBS), "Bulletin of the Third National Time Use Survey"

# Changes in the Age Structure of Internet Users

- By December 2024, the proportion of middle-aged and elderly internet users (aged 50+) in China has continued to rise, now exceeding one-third of all internet users. With demographic shifts and digital penetration accelerating, the **silver economy** is poised to become a new growth engine.
- Meanwhile, the share of the core consumer group aged 20-39 continues to decline. Brands urgently need to enhance retention among younger users through **content and interactive innovation**.

The proportion of different age groups among the overall internet user population



Data Source: Statistical Report on the Development of China's Internet

# Social Media Platforms Preferred by Users

## Short video platforms continue to dominate the market.

- **Douyin**'s growth rate has surged ahead by a mile
- Kuaishou maintains its growth trajectory, though its penetration in lower-tier markets is nearing saturation
- As a super app, **WeChat**'s overall penetration rate approaches its ceiling, with its in-app video channel emerging as a new growth driver

## Lifestyle and long video platforms show steady growth.

- **Red** has surged ahead, achieving a closed-loop for the recommendation economy
- **Bilibili** continues to expand through diverse content and its community ethos

### Our Insights

#### From traffic dividends to content cultivation

##### ✓ Resource allocation:

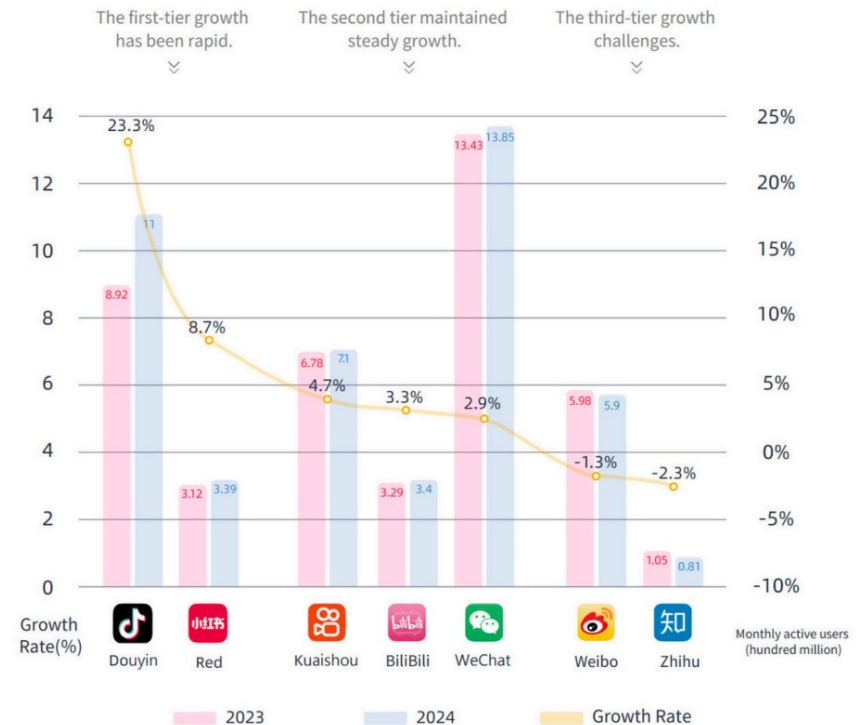
Dynamically allocate marketing resources to priority platforms based on user segmentation

##### ✓ Adopt different marketing strategies:

Aggressive: Capture incremental market share in the first tier

Defensive: Enhance the value of existing assets in the second tier

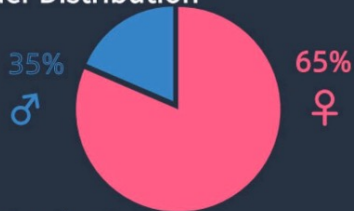
Focused: Concentrate on quantifiable ROI scenarios in the third tier





Industry **Beauty** Technology **Infant**  
**Sports** F&B Travel

### Gender Distribution



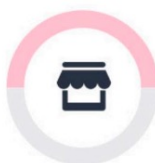
### Age Distribution



### City Distribution



## Live-stream e-commerce is growing rapidly



**8.1x**

Year-on-year increase in the number of new merchants joining in 2024



**3x**

Live streams from store broadcasts exceeding one million views per session saw year-on-year growth.



### Live Streaming Categories

Parenting and family life, home furnishings, and hobbies and interests are experiencing rapid growth.

## Buyer economy drives closed-loop purchasing

- Amateur buyers with modest followings drive millions in GMV
- Top-tier creators across platforms flock to Red as buyers, showcasing authentic lifestyles to connect with more like-minded, targeted users
- Niche buyers deliver more precise and professional recommendations while creating additional growth opportunities for brands



Establishing a matrix of 'influencer marketing × buyer distribution × brand-owned live streaming'

# Travel Trade

- Nordic in general had good growth among European destinations
- Connecting products are more popular in both summer and winter(Nordic package, Finnish Lapland+Northern Norway)
- Northern Norway Tromsø and Lofoten Island has now become the biggest selling point of Nordic products in the market; Iceland is holding its positioning and attractiveness in both seasons; Swedish Lapland is a challenger
- Educational travel to Finland is still popular but hitting the bottleneck
- Rising destinations like South America, Africa, South Pole/Antarctic, North Pole/Arctic Circle, Cruises, Caucasus region, Middle East\*
- OTA – Trip.com VS. OTS - Fliggy
- Segmented (tailor-made, travel consultants, theme-based, etc.)
- Social Media has become a very important sales channels for the travel trade
- AI implementation

# 2027 planning

# 2027 Planning

## Sales Events

- VF China Roadshow, Beijing, Shanghai & Guangzhou, April
- ITB China 2027, May
- Routes Asia, March

## FAMS

- MATKA in January
- DMC FAM in May
- Family Travel FAM + workshop in Helsinki in September

## PR

- Media & KOL Trip, TBC

## SoMe

- Always on contents in Weibo, WeChat and Red Book

## Joint Promotions

- OTA Campaign – snow free season
- Supporting materials for key TO partners
- Knowledge Bank

# Biannual market reports and upcoming webinars

- Biannual market reports published: <https://www.visitfinland.fi/toiminta-markkinoilla/>
- Spring market webinars: <https://www.visitfinland.fi/ajankohtaiset/matkailun-tapahtumat/>
  - France: Thu 21st at 13:00 - 13:45
  - Spain: Thu 21st at 14.00 - 14:45
  - USA Tue 26th May at 16:00 - 16:45
  - Germany Thu 28th May at 14:00 - 14:45
  - UK -> new date, 1st Sep at 14:00 - 14:45

