

UK market update webinar

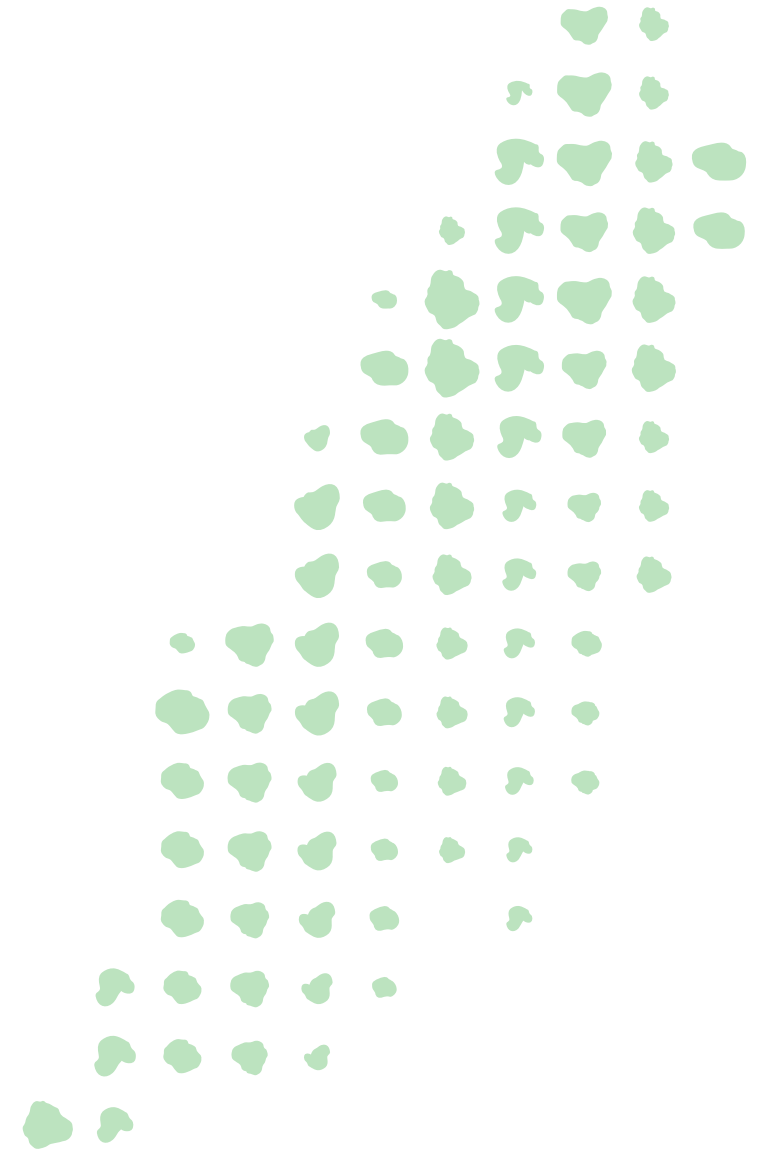
September 2026



Visit Finland

Agenda

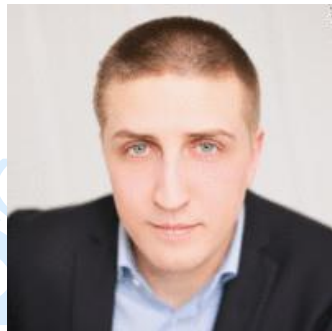
- **Welcome**
- **UK market overview**
- **Market insights**
 - UK 2025 statistics
 - Winter season DEC25 – FEB26
 - Summer (June-July) update
- **Industry update and consumer behaviour**
- **2026 Visit Finland B2B activities + PR update**
- **Final notes**



Visit Finland UK market team



Asta Kekkonen
Area Manager, UK and
USA



Sergei Shkurov
PR Manager, UK



UK market overview

THE ECONOMIC AND EMPLOYMENT CONTRIBUTIONS OF OUTBOUND TRAVEL

UK economic impact and the importance of holidays

OUTBOUND TRAVEL

£52bn

GVA to the UK economy

2.1%

of UK economic activity

GVA COMPOSITION

£22bn

direct

£17bn

indirect

£12bn

induced

EMPLOYMENT SUPPORTED

818,000

jobs supported

370,000

direct

262,000

indirect

187,000

induced

2030 GROWTH POTENTIAL

+20% → £62bn GVA

compared with 2023 levels

THE IMPORTANCE OF HOLIDAYS



9/10

people agree that holidays are important to them



6/10

travellers in the UK book package holidays

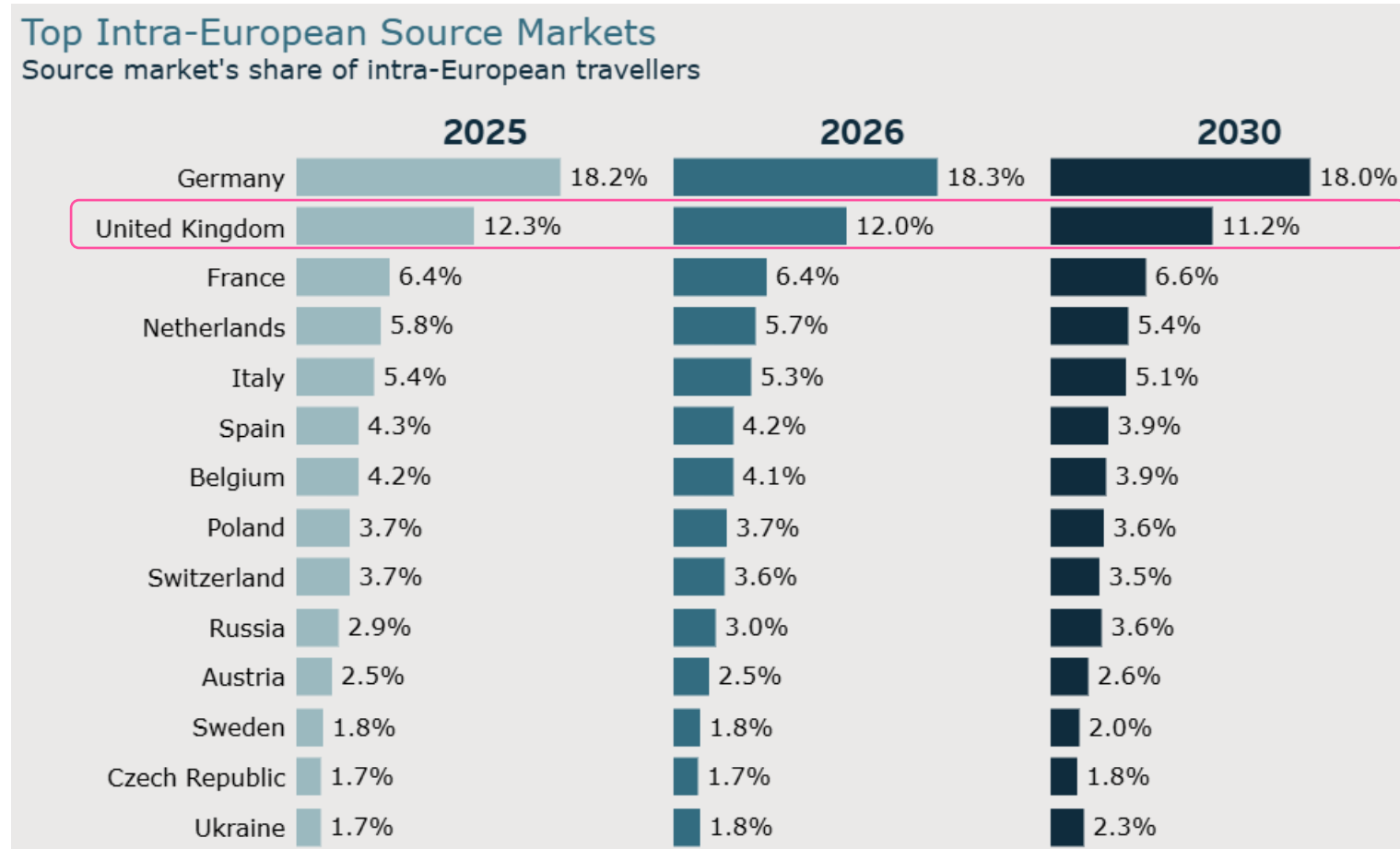
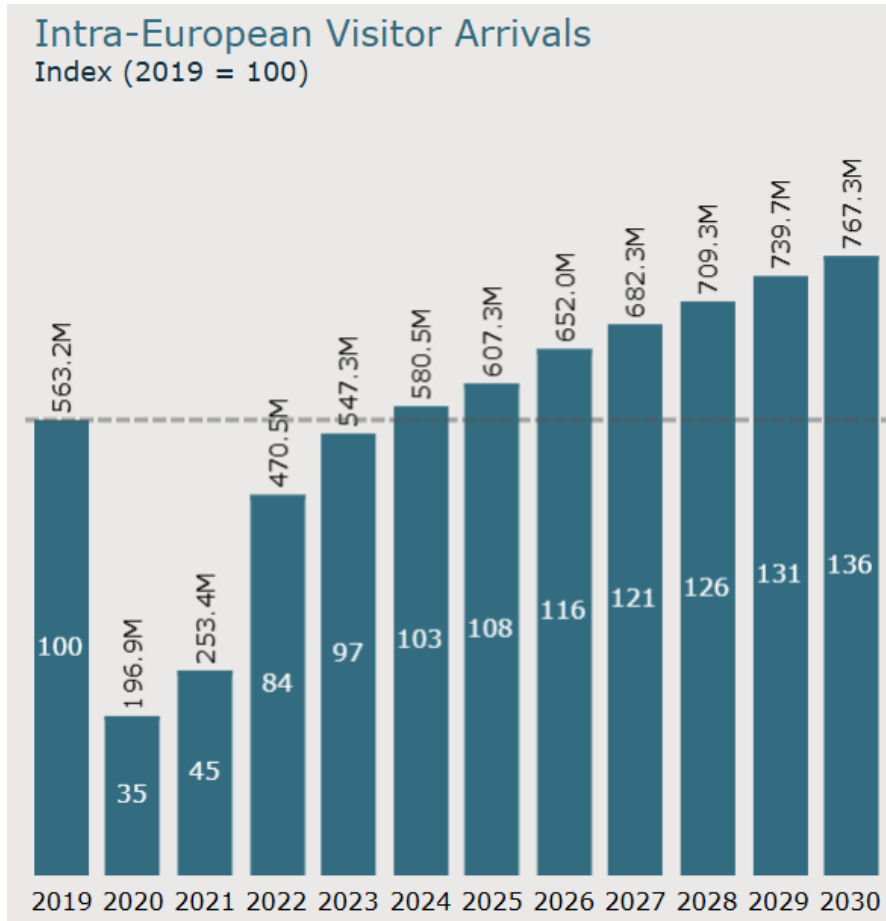


93%

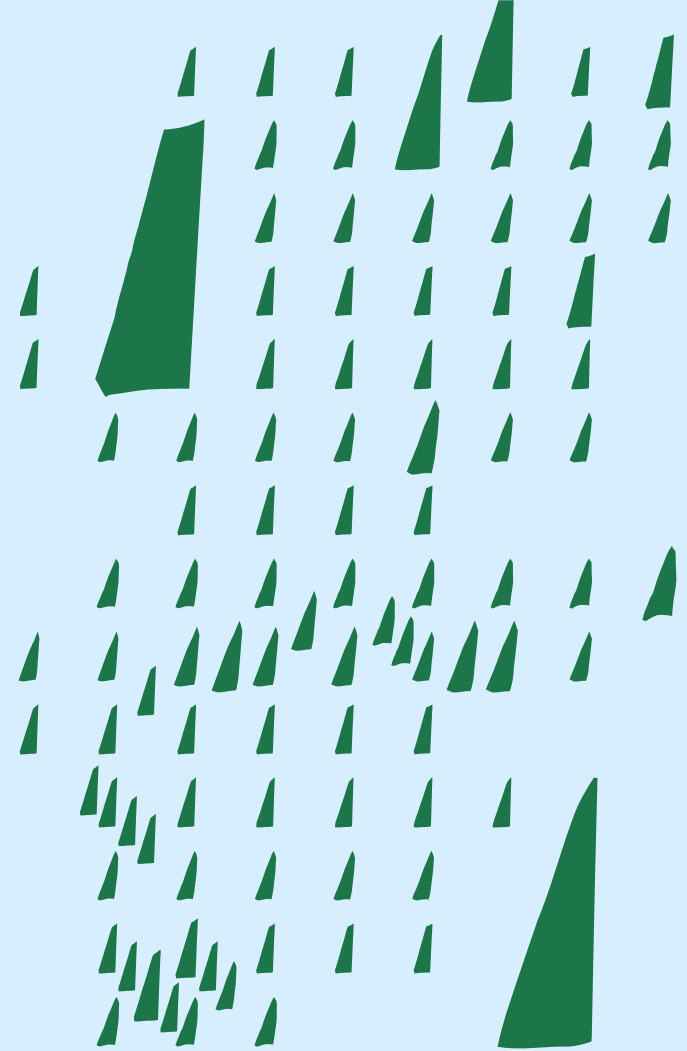
say holidays improve their mental health

Intra-European travel expected to grow further

UK is the 2nd largest source market



UK 2025 statistics for Finland



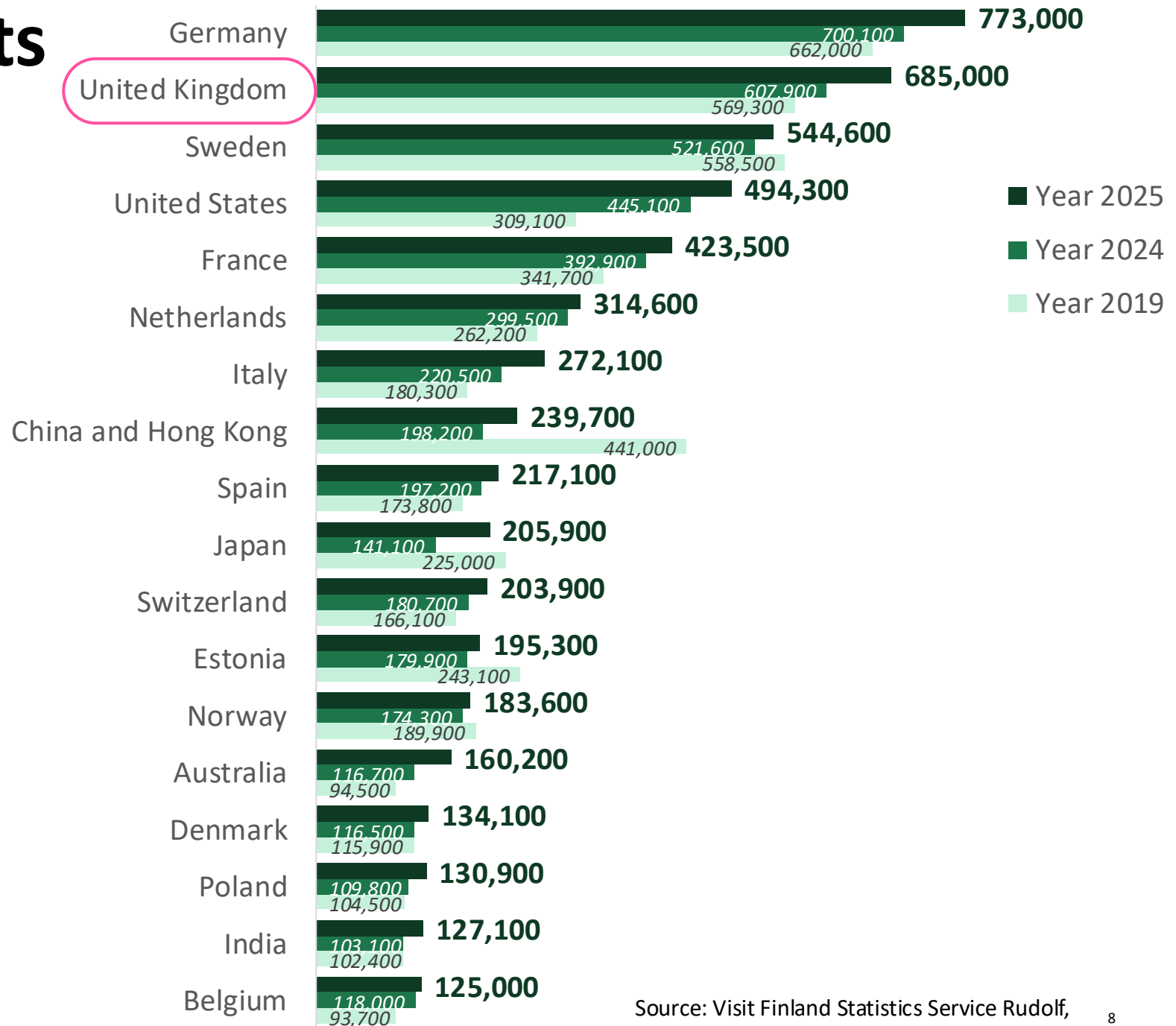
Main source markets in 2025

685,200 British

registered overnight stays in 2025
+13% compared to 2024
(+20% compared to 2019)

British registered overnights in Finland
reached a new record again in 2025.

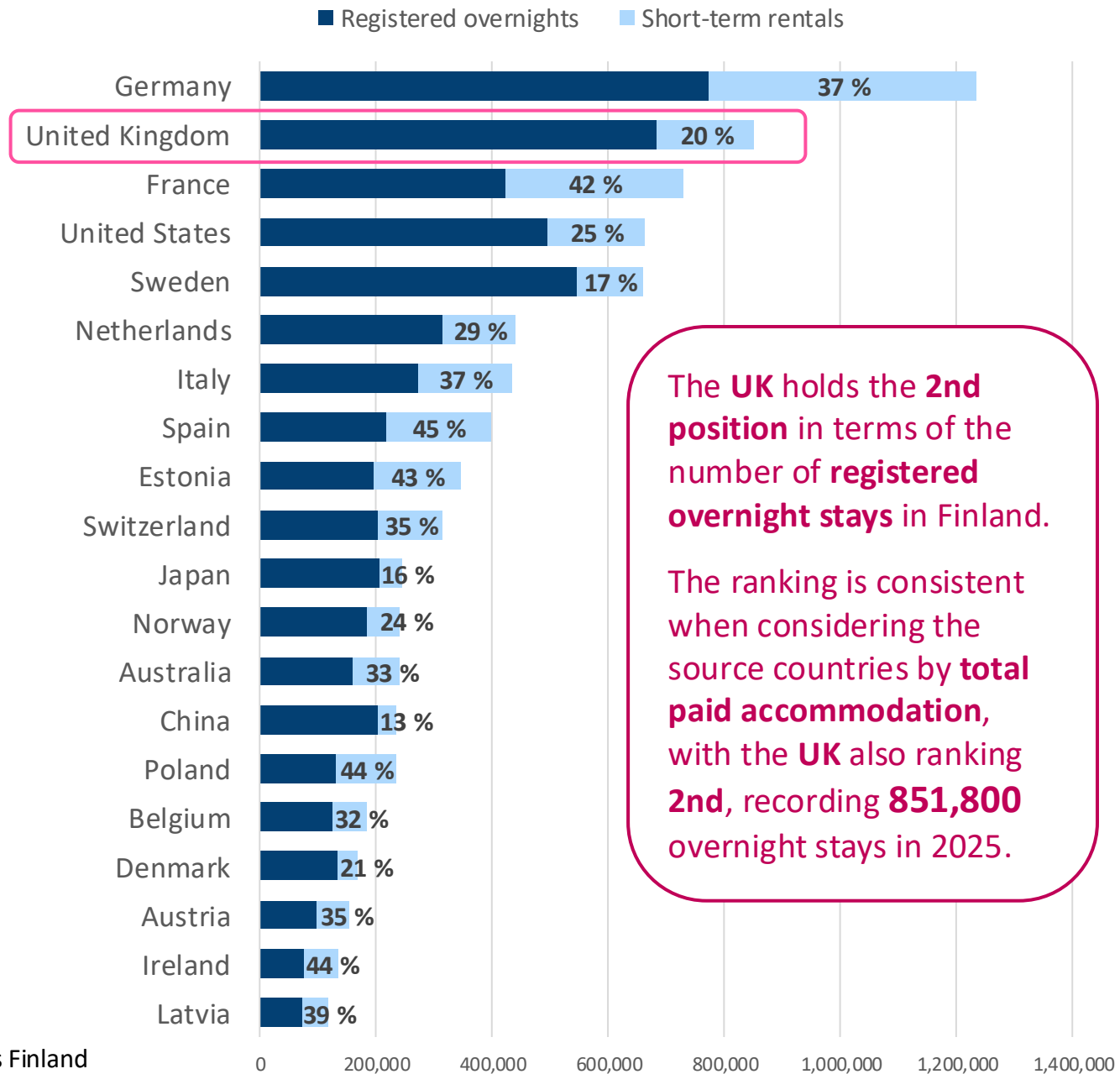
In addition to the registered overnights,
British travellers are **increasingly**
choosing **short-term rentals** for their
trips. In 2025, British visitors' short-term
rentals counted for **20%** of their **852,000**
total paid accommodation in Finland.



Registered and short-term rentals overnights in Finland Year 2025

- In 2025, foreign visitors recorded **3.2 million overnight stays** in short-term rentals, **up 18% from 2024**. This brought the **total number of foreign paid overnight stays** to more than **10.4 million**, a **15% year-on-year increase**.
- **Short-term rentals accounted for 31% of foreign overnight stays in 2025**, compared with 21% in 2019, before the pandemic.
- **Short-term rentals** accounted for **the highest shares** of paid overnight stays among visitors from **Spain, Poland, Ireland, Estonia, and France**.
- **Short-term rentals** accounted for **the lowest shares** of paid overnight stays among visitors from **China, Japan, Sweden, and the UK**.

Registered and short-term rentals overnights in Finland - 2025



All British travellers to Finland

Year 2025

Year

2025

Quarter

All

Month

All

Latest 12 months

All

Start / End date

01/2025

12/2025

Menu

Map

FI

EN

Departure region

All

Departure Countr...

United Kingdom

Travel Destinations

All

Travel Type

All

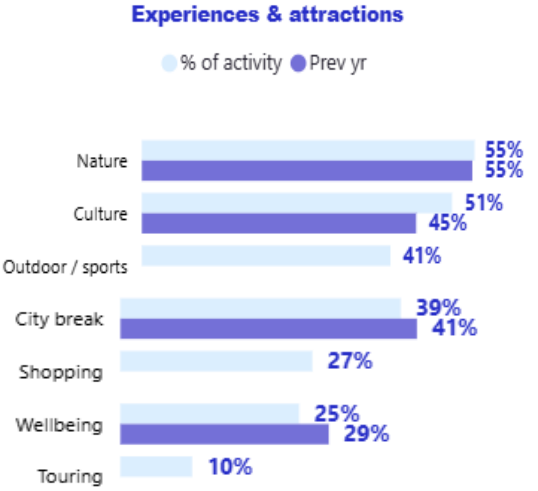
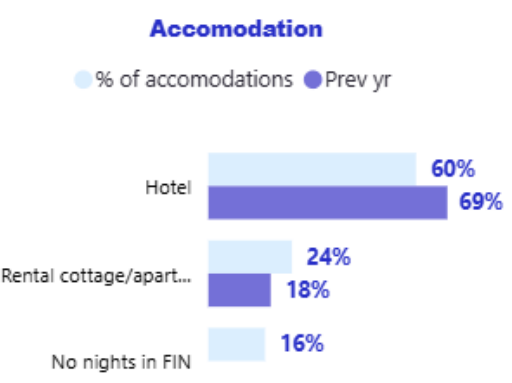
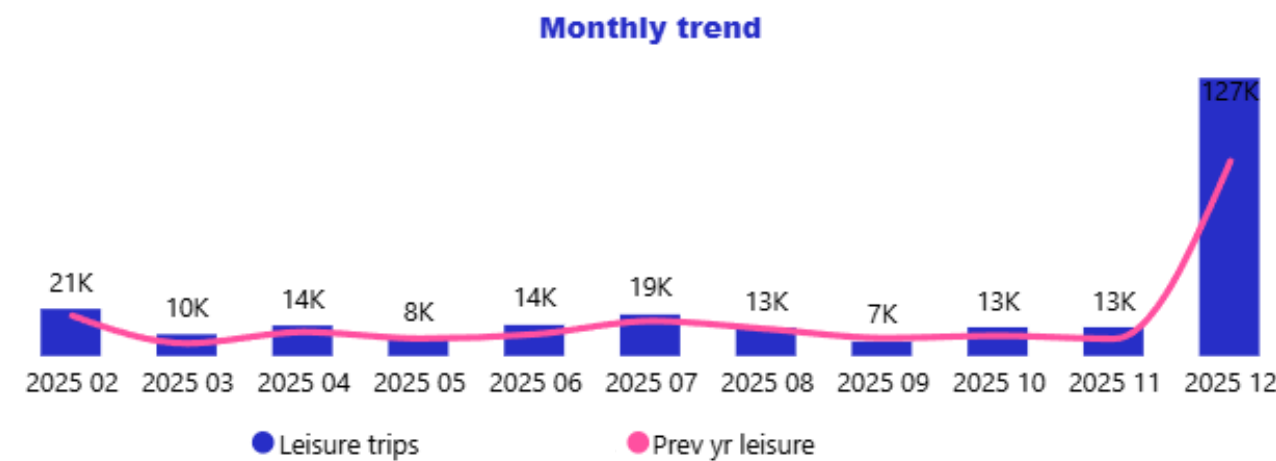
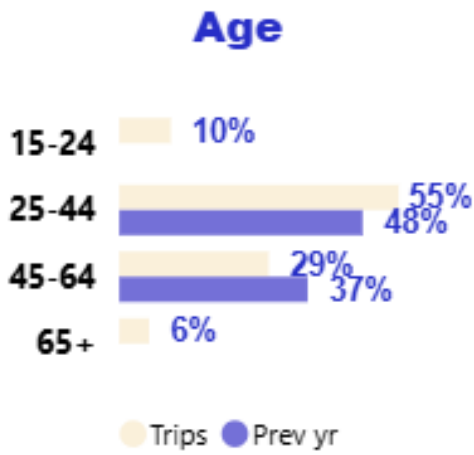
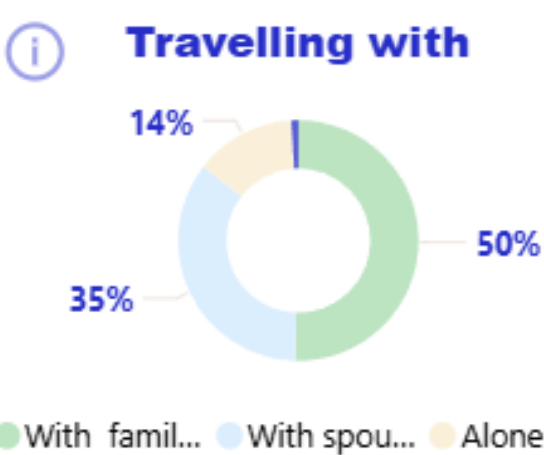
Travel Purpose

All



British vacation/recreation travellers to Finland - Year 2025

- In 2025, **holiday travel** from the UK to Finland rose notably during **both winter and summer** compared to 2024.
- Half of the travellers came with **family or friends**, 35% with a **partner**, and 14% travelled **alone**. Over half of tourists were **young adults** aged 25-44.
- Most British holidaymakers preferred **hotel accommodation** while visiting Finland, although there was **an increase in the use of rental cottages and apartments** compared to 2024.
- Experiences related to **nature and culture** remained the most popular holiday activities, with **outdoor and sports activities** gaining in popularity.



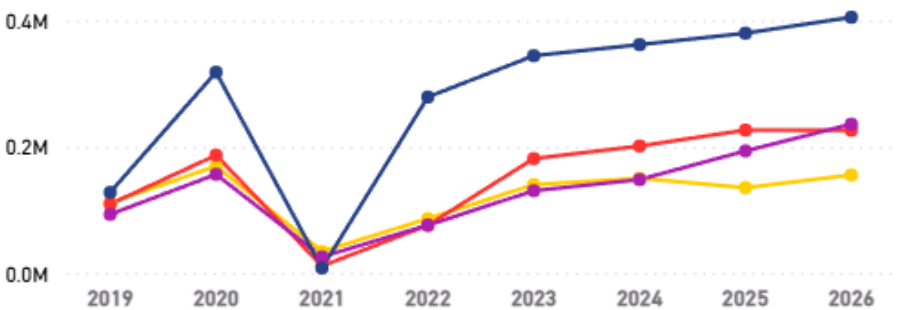
Winter & summer high seasons: British registered overnights in the Nordics



Winter (Dec-Feb)

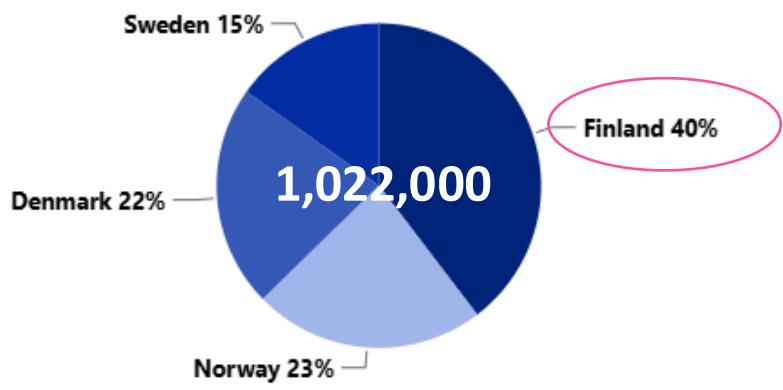
WHOLE COUNTRY Foreign United Kingdom

Sweden Denmark Norway Finland



Share of overnights - winter (Dec-Feb)

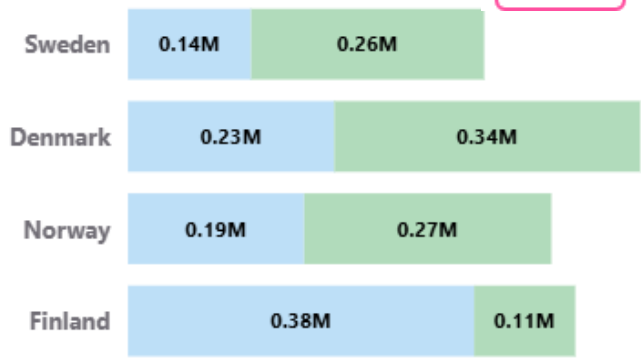
2026



Overnights in winter & summer

WHOLE COUNTRY Foreign United Kingdom

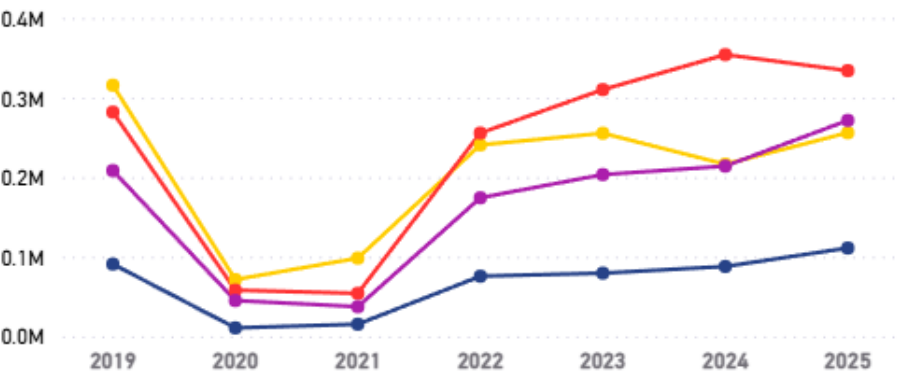
2025



Summer (Jun-Aug)

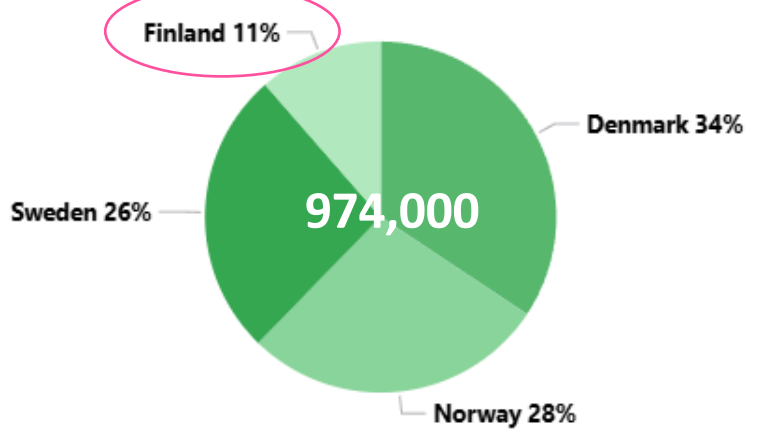
WHOLE COUNTRY Foreign United Kingdom

Sweden Denmark Norway Finland



Share of overnights - summer (Jun-Aug)

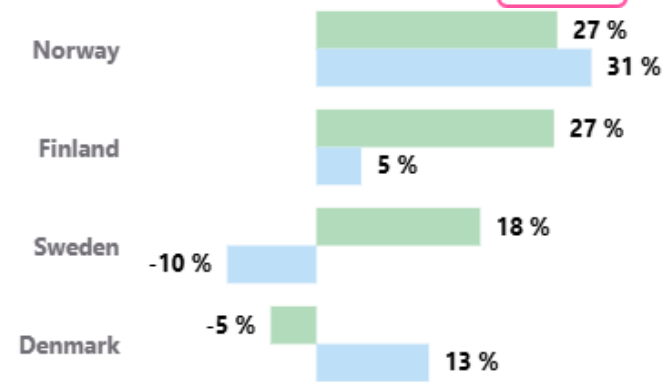
2025



YoY change in seasonal overnights %

WHOLE COUNTRY Foreign United Kingdom

2025



Overnights in winter high season 2025-2026

And change compared to winters 2024-2025 & (2018-2019)

High winter season (12-02)

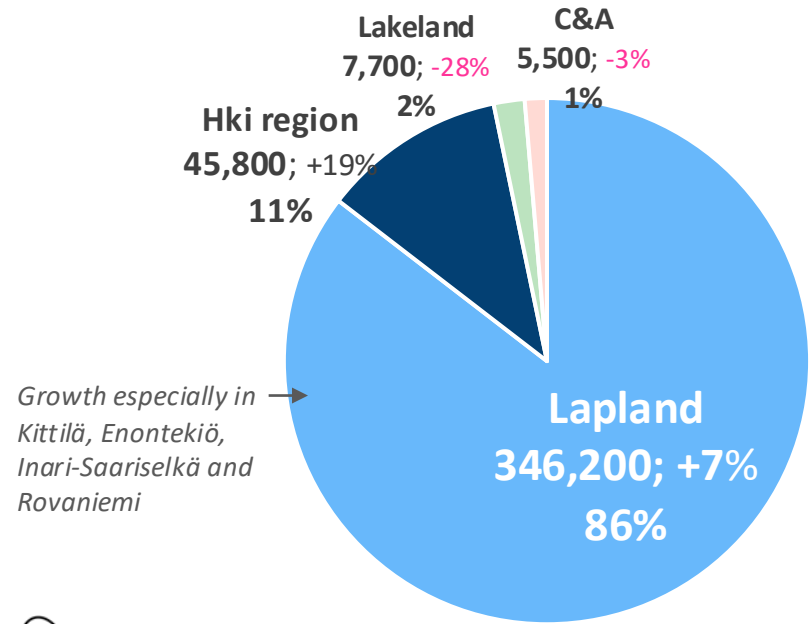
2.5M foreign overnights

+7% vs. winter 2024-2025

(+19% vs. winter 2018-2019)

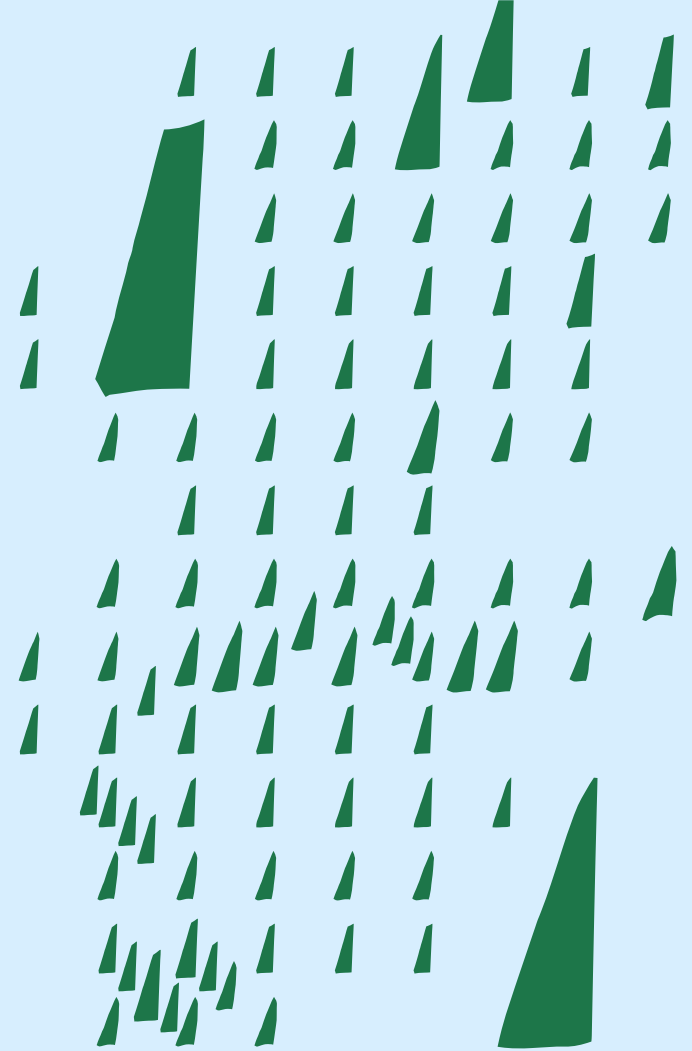
- **1.6M** from EU-27 + UK / **+7%** (+37%)
- **389,000** from Asia / **+9%** (+14%)
- **171,000** from America / **+17%** (+135%)

British overnights / winter 2025-2026



	winter 2019	winter 2025	winter 2026	winter 2026 vs. 2019	winter 2026 vs. 2025
UK	334 900	379 900	405 200	+21 %	+7 %
Germany	151 300	199 400	232 400	+54 %	+17 %
France	161 700	234 000	208 400	+29 %	-11 %
Netherlands	106 700	149 300	143 600	+35 %	-4 %
USA	53 800	103 800	114 700	+113 %	+10 %
China & Hong Kong	139 700	79 500	89 900	-36 %	+13 %
Italy	42 900	74 800	84 300	+97 %	+13 %
Spain	59 400	73 900	83 000	+40 %	+12 %
Australia	32 600	61 200	81 000	+149 %	+33 %
Sweden	75 100	68 500	76 500	+2 %	+12 %
Switzerland	51 800	68 700	70 300	+36 %	+2 %
Belgium	30 300	51 600	62 000	+105 %	+20 %
Japan	49 900	44 600	54 900	+10 %	+23 %
Estonia	58 200	47 200	54 400	-7 %	+15 %
Singapore	35 300	58 400	50 000	+41 %	-15 %
Taiwan	11 000	24 800	38 500	+252 %	+55 %
Ireland	14 900	32 700	37 500	+152 %	+15 %
India	19 000	37 500	36 600	+92 %	-3 %
Poland	21 900	31 900	33 700	+53 %	+6 %
Denmark	21 200	27 000	33 500	+58 %	+24 %

Summer review, June-July 2026



Overnights in summer high season **2025**

And change compared to summer 2024 & 2019

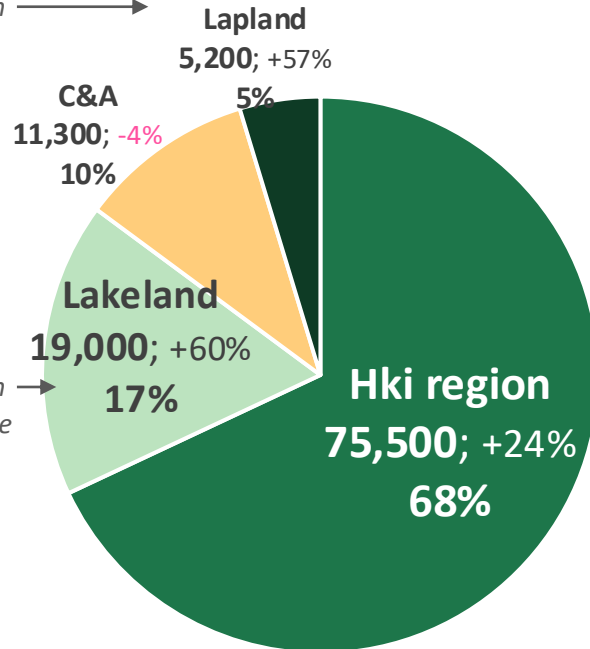
2.1M foreign overnights

(+12% vs. summer 2024 & -6% vs. summer 2019)

- **1.3M** from EU-27 + UK (+13% & +9%)
- **250,300** from Asia (+25% & -27%)
- **233,500** from America (+15% & +47%)

British overnights / summer 2025

Growth especially in
Rovaniemi and
Kuusamo



Growth especially in
Kuopio and Tampere

	Jun-Aug 2019	Jun-Aug 2024	Jun-Aug 2025	2025 vs. 2019	2025 vs. 2024
Germany	270 300	251 500	281 100	+4 %	+12 %
Sweden	255 200	242 300	242 800	-5 %	0 %
USA	109 900	157 900	176 500	+61 %	+12 %
UK	90 800	87 700	110 200	+21 %	+26 %
Italy	68 200	65 600	86 600	+27 %	+32 %
Norway	73 400	76 800	75 900	+3 %	-1 %
France	64 100	61 400	72 400	+13 %	+18 %
Switzerland	64 400	65 200	71 800	+11 %	+10 %
China & Hong Kong	133 300	47 400	67 300	-50 %	+42 %
Estonia	69 400	59 400	66 400	-4 %	+12 %
Netherlands	62 300	59 500	66 100	+6 %	+11 %
Japan	73 100	46 300	63 500	-13 %	+37 %
Spain	56 600	54 800	61 200	+8 %	+12 %
Poland	31 400	38 300	46 000	+46 %	+20 %
Denmark	37 700	36 400	38 600	+2 %	+6 %
Austria	27 900	28 900	34 500	+24 %	+19 %
Australia	27 600	25 800	29 500	+7 %	+14 %
Belgium	21 500	23 400	25 800	+20 %	+10 %
Canada	17 700	19 000	24 900	+41 %	+31 %
India	27 200	19 600	22 700	-17 %	+15 %

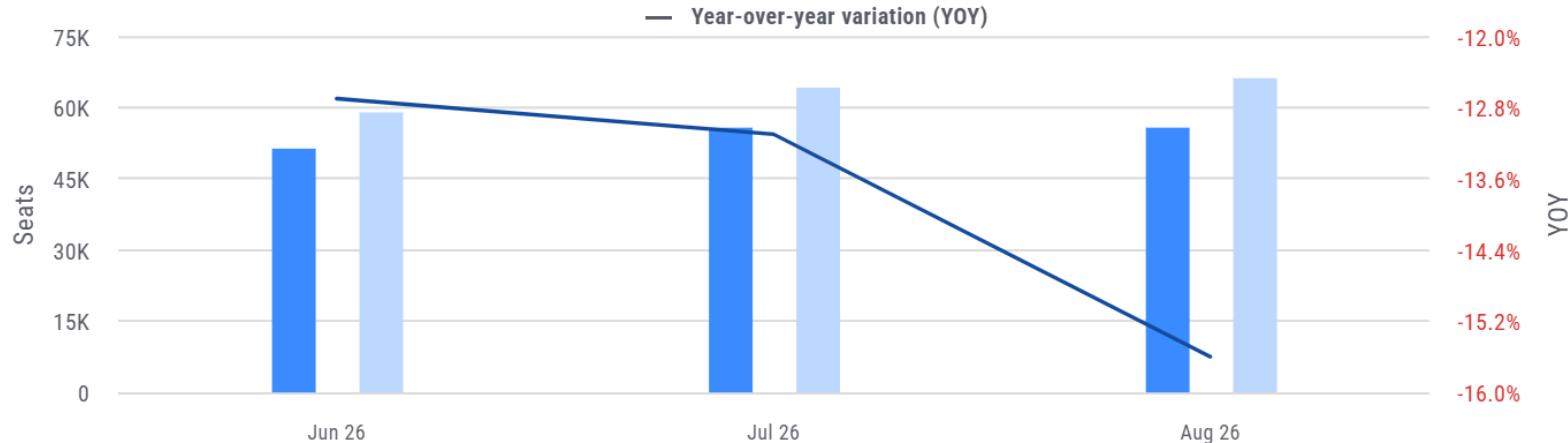
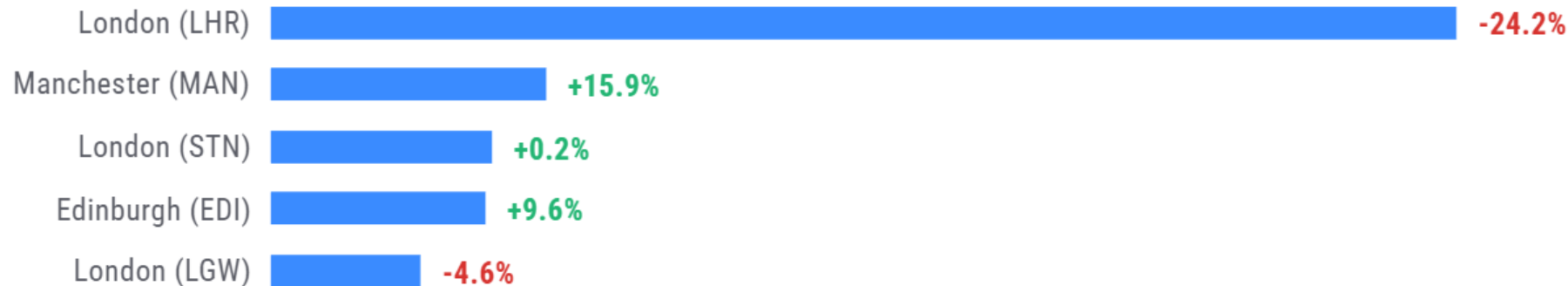
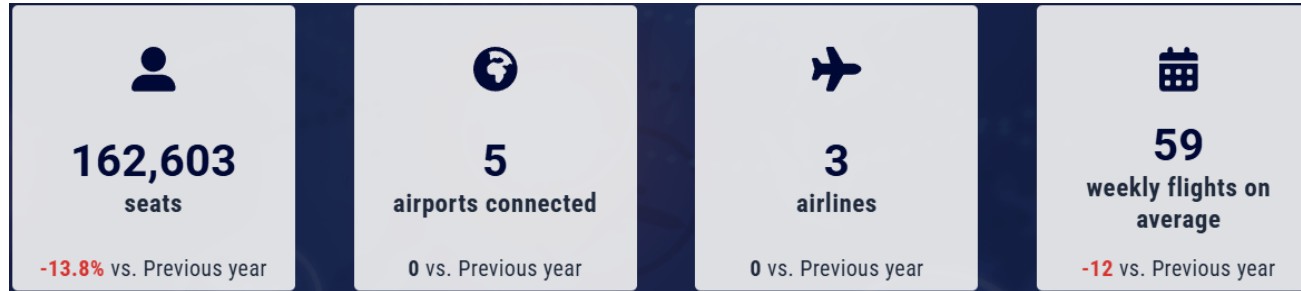


Visit Finland

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Seat capacity from the UK to Finland in Jun – Aug 2026

Comparison to previous summer



The number of seats available from **London to Finland** has clearly decreased this summer as Finnair has cut its flight offering from six to four daily flights.

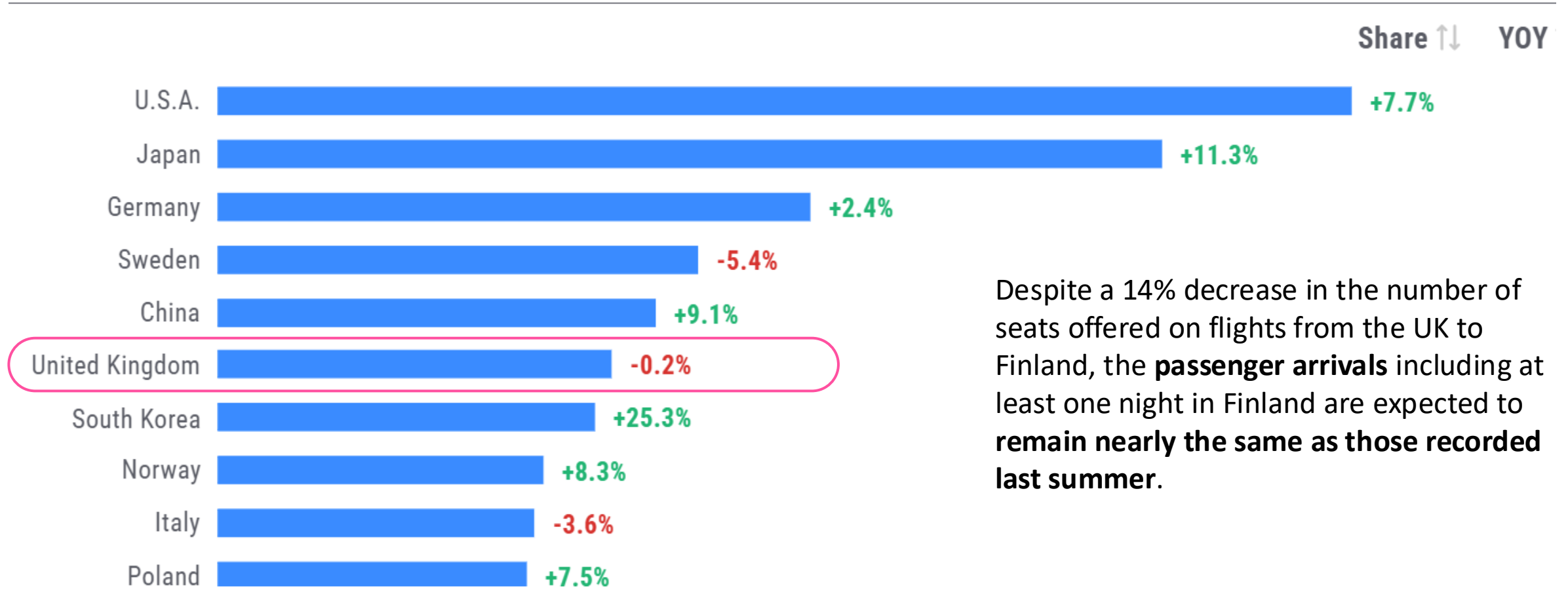
The total seat capacity from the UK has been **14% lower** than last summer.

Flight Passenger arrivals* in June – August 2026

Comparison to previous summer

545,123 tourist arrivals

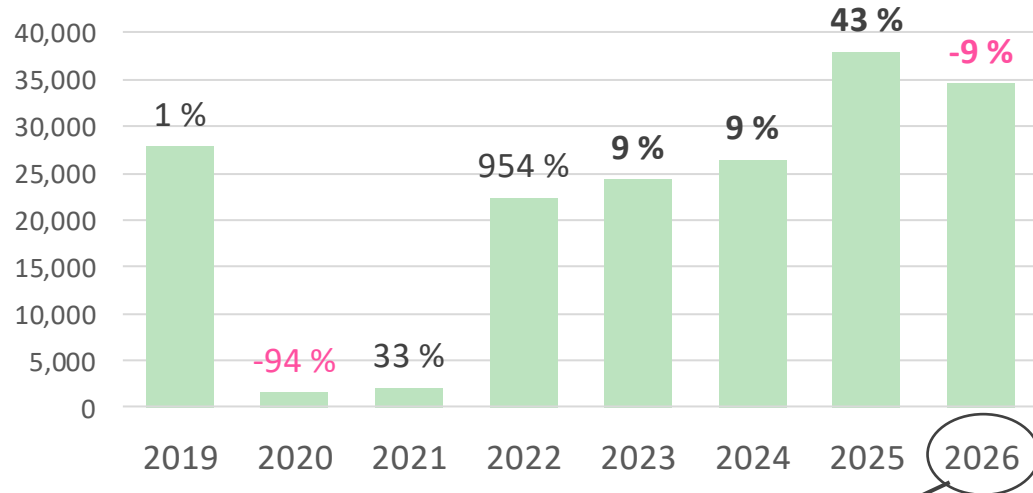
+5.4% YOY



Despite a 14% decrease in the number of seats offered on flights from the UK to Finland, the **passenger arrivals** including at least one night in Finland are expected to **remain nearly the same as those recorded last summer.**

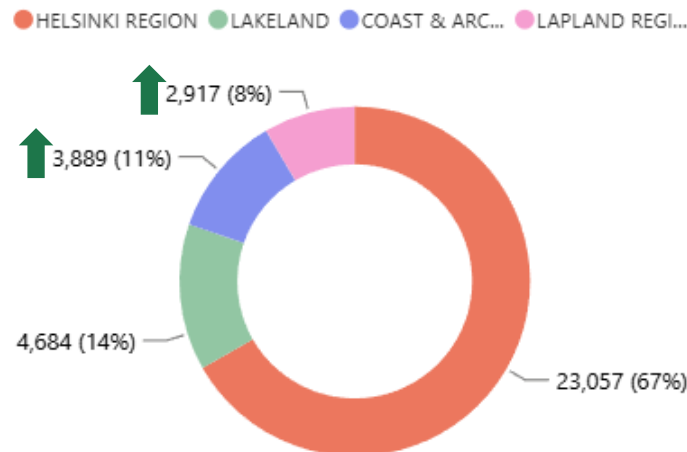
British overnights in Finland in June & July 2026

British overnights in Finland in June 2019 - 2026

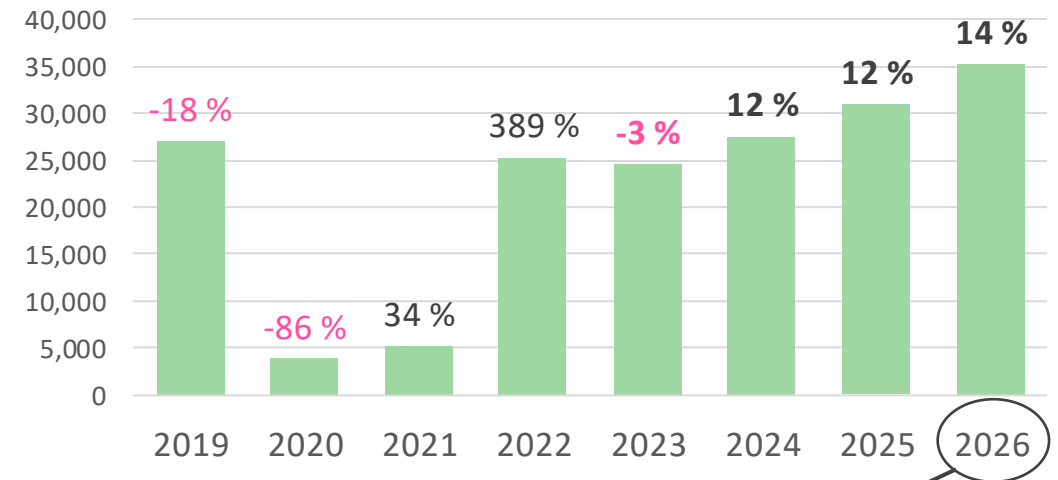


In June 2026, the UK was the **4th largest** source market. Overnights decreased from record high June-2025 but were still among the highest.

Despite the overall decrease, British overnights grew clearly in **Kuusamo, Oulu, Lahti, and South Savo**.

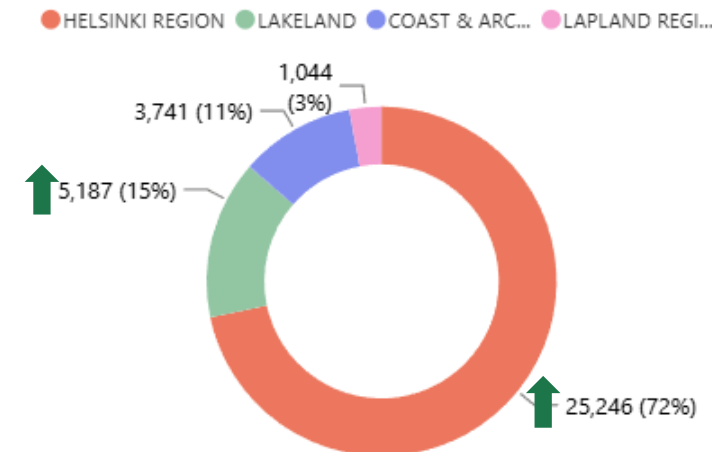


British overnights in Finland in July 2019 - 2026

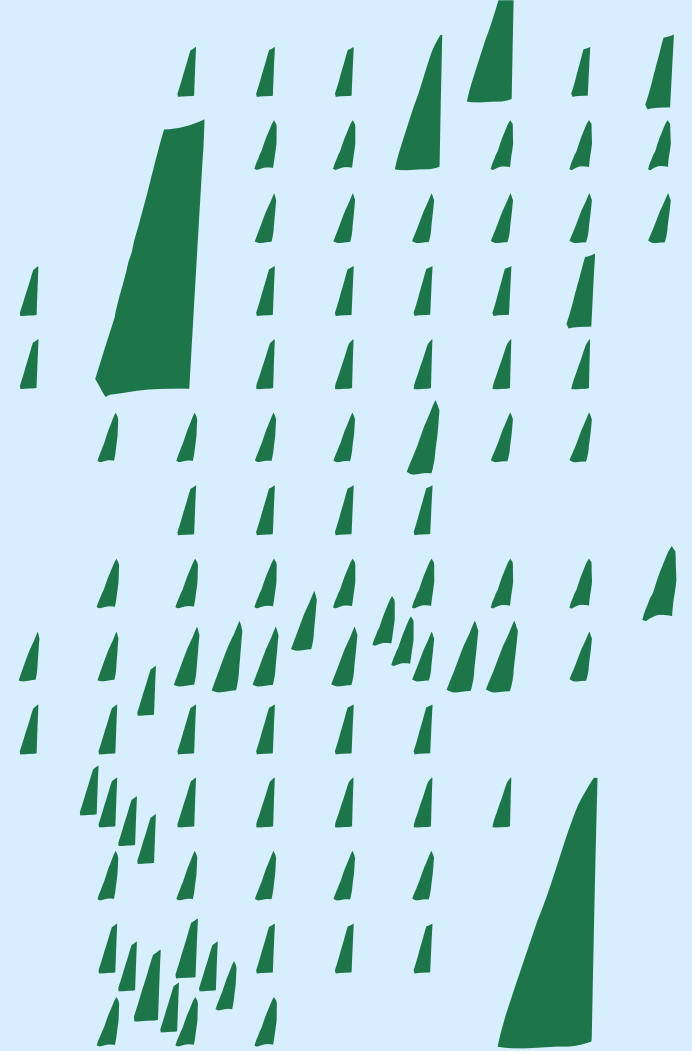


In July 2026, the UK was the **5th largest** source market with **record high number of overnights**.

YoY growth in British overnights can be seen especially in the **Helsinki region** as well as in **Jyväskylä, Tampere, Savonlinna, and Vaasa** regions.



Outlook for autumn and winter





Amadeus/Destination Gateway

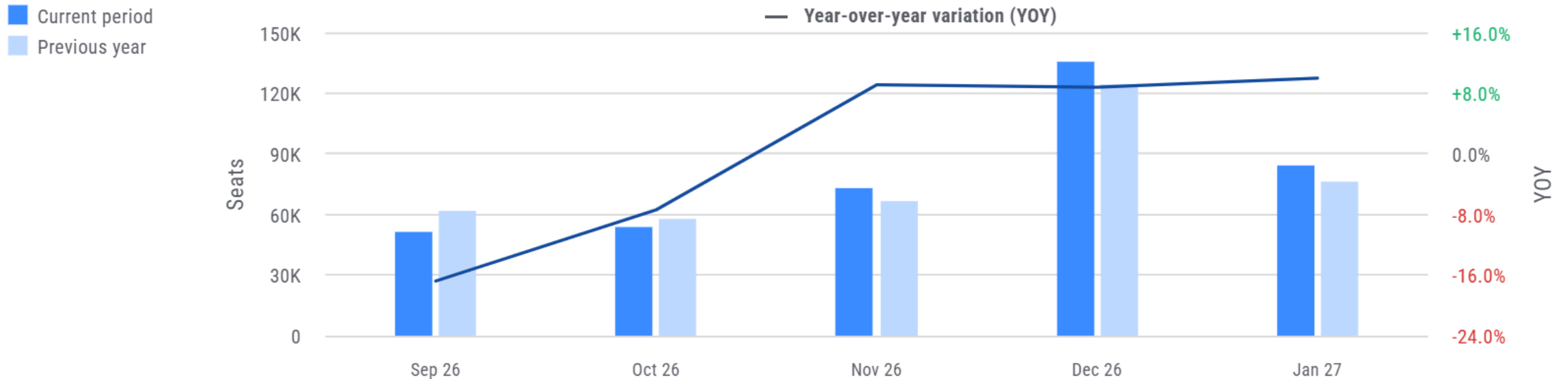
**Seat capacity &
forecast for
Flight arrivals during
Sep 2026 – Jan 2027**

Seat capacity from the UK to Finland in Sep/2026 – Jan/2027

Comparison to previous year

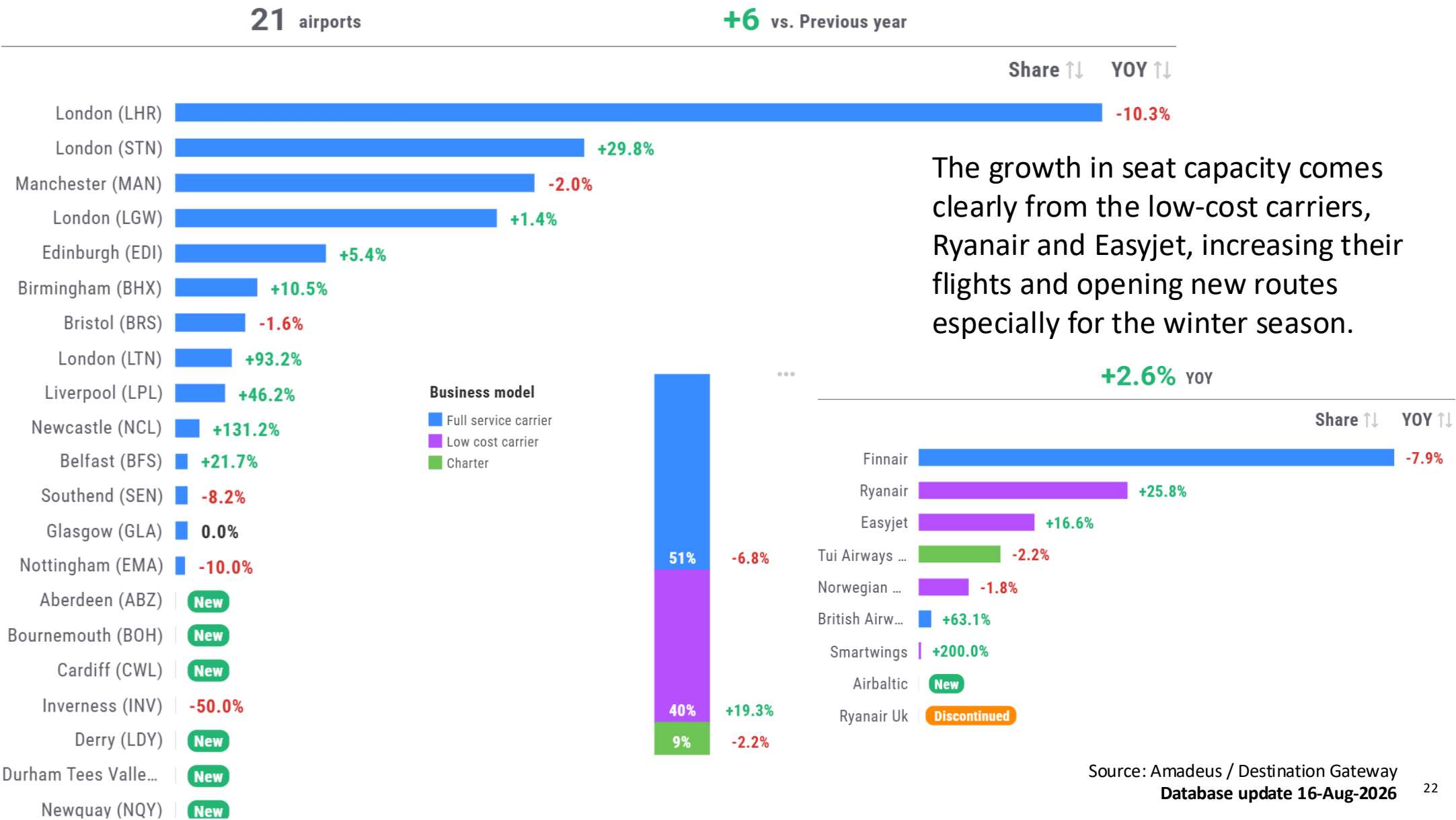


The number of seats available from **the UK to Finland** will increase for the winter season and there will be new flight connections from 6 new airports.



Seat capacity from the UK to Finland in Sep/2026 – Jan/2027

Comparison to previous year

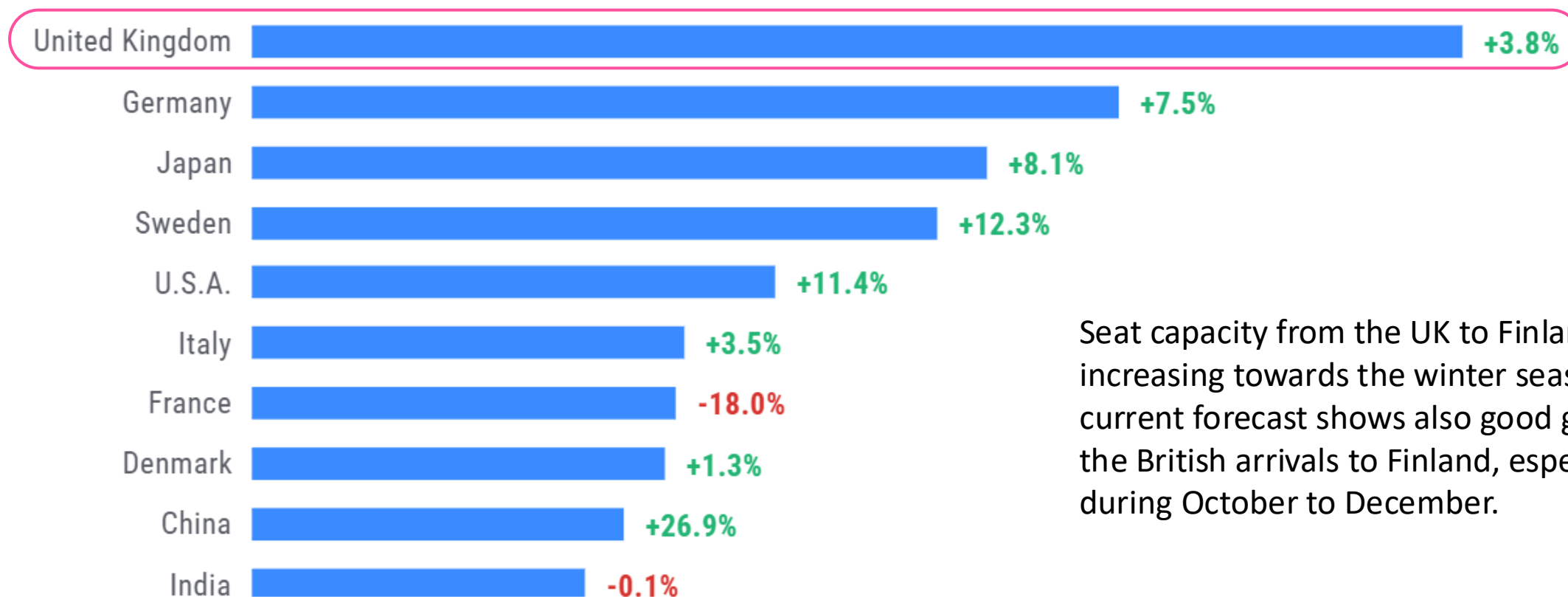


Forecast for Flight Passenger arrivals* in Sep/2026 – Jan/2027

Comparison to previous year

877,822 tourist arrivals

+7.0% YOY

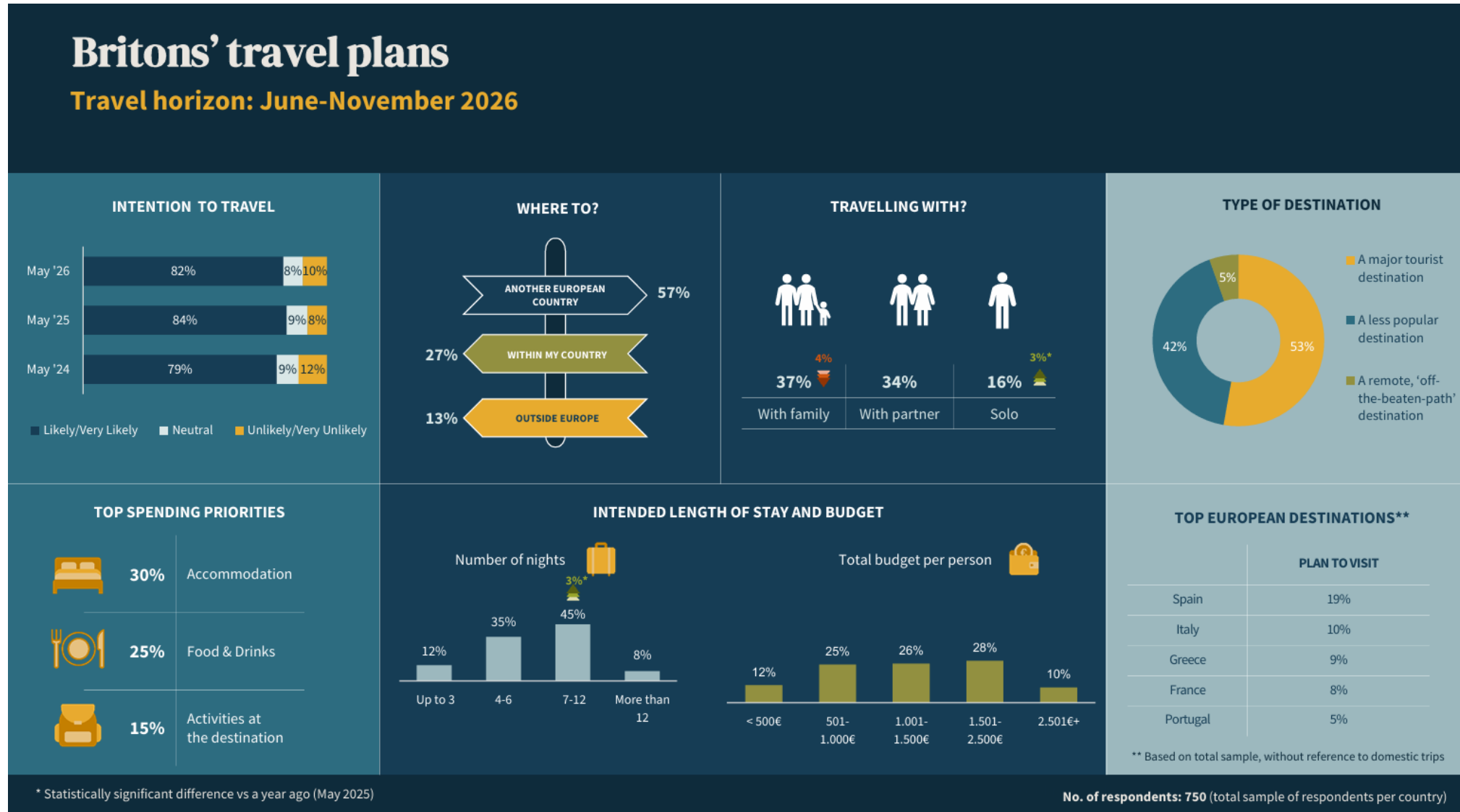


Seat capacity from the UK to Finland is increasing towards the winter season and the current forecast shows also good growth in the British arrivals to Finland, especially during October to December.

Industry update and consumer behaviour

ETC: Britons' travel plans for June – November 2026

- Britons' intention to travel in Jun-Nov 2026 remains on a very high level
- 57% are traveling to another European country
- 53% want to travel to a major tourist destination and 42% to a less popular destination
- Length of stay seem to be increasing
- Traveling with family is decreasing while solo travel seem to be on the rise



Global turmoils and policies keep challenging the industry

Summer 2026 on course to be UK's hottest on record, says Met Office

Records smashed

Long-standing heat records have been toppling throughout the summer.

- This year is the first on record when 35C or above has been reached in three separate calendar months - May, June and July. With 38C predicted later in the week, a fourth calendar month will be added to that total.
- It was the driest July in both England and Wales since records began in 1836. Southern England had its driest calendar month on record.
- By 15 July, the UK had already recorded more days above 30C than in the whole of 1976 - a year that is remembered by many for its iconic and long-

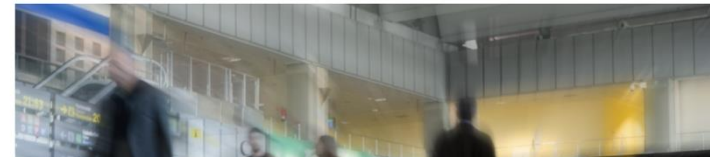
Wildfires prompt a third of UK travellers change plans, research suggests

Aug 11, 2026 13:00 GMT by Andrew McQuarrie



EES 'starting to act as deterrent to travel', European airports trade body warns

Jul 30, 2026 07:30 GMT by Phil Davies



'I don't know how we'll cope this summer': New EU border checks 'keeping airport bosses awake at night'

EUROPE DEA JUSUFI 24 JUNE 2026

Europe's airports chief says the EU's newly launched biometric border checks are already causing hours-long queues and risk damaging Europe's reputation as a travel destination, warning: "I don't know how we'll cope this summer."

Travel Agents Tour Operators Cruise Air Accommodation Touring & Adventure People

Airlines likely to 'trim frequencies and ground aircraft' in winter due to high fuel costs

The Renewed Risk of a Jet Fuel Shortage

Posted 24/08/2026 00:00



Middle East conflict 're-shapes' how and when people book holidays

Jul 9, 2026 10:10 GMT by Phil Davies



Immediate impacts in summer 2026



Tour operators are stretching

People are more likely to book via a travel agent or tour operator as the Middle East conflict has re-shaped how and when people book their holidays (ABTA)

Very last minute bookings, changes and cancellations

Missed flights, refunds and unhappy customers

Some organizational reshapes have already been seen



Rising interest towards cooler destinations

Staysure: 58% likely to choose a cooler destination less exposed to extreme heat for holidays this summer. 24% rise in travel insurance policy sales for trips to **Norway**

Trivago: UK bookings for July and August rising sharply year on year. **Norway** +55%, **Sweden** + 57%, **Denmark** +29%

Kayak: Summer searches for cooler destinations seeing increase (for example **Ottawa** +166% YoY, **Salzburg**, +92% YoY, Glasgow 24%)



Preference on intra-European and domestic travel

USA boycotts

Safety concerns in Middle East transit routes

Queues on EU borders

Will the “coolcation” phenomena last?

- **Specialist tour operators are putting more effort in developing the snow-free and summer travel**
 - For example Best Served Scandinavia, Exodus Adventure Travels, Regent Holidays, Artisan Travel
 - **Volumes are not comparable to Winter Lapland!**
- **Interesting products:**
 - Lapland and Northern Norway combination tours
 - Helsinki + Rovaniemi train combinations
 - Lakeland self-drive touring
 - Turku-Tampere-Helsinki train touring, possibility to combine with Stockholm and Tallinn with ferry
 - Activity led holidays: walking, wild-swimming, cycling, bear-watching and kayaking
 - Sauna, sauna, sauna



The coolcation trend is here to stay

Comment Jun 10, 2026 08:00 GMT

Andrea Godfrey of Regent identifies an opportunity for agents to take advantage



The word “coolcation” might be up there for some people with terms like ‘bleisure’ or ‘noctourism’ – flimsy-sounding concepts drummed up by marketers to create a new trend or PR angle.

While it’s undoubtedly a buzzword of our time and industry, “coolcation” certainly seems to have more sticking power than the rest.



Not only did the word make its way into the Collins Dictionary Word of the Year list last year, but we at Regent are seeing the coolcation phenomenon tangibly playing out, representing a very real shift in customer demand that has gained momentum over the last few summers.

There's some work to be done...

Key insights gathered:

- Finland is widely understood by operators and consumers as a Lapland only / winter led destination
- Outside winter, awareness is much weaker and often requires active selling
- Several operators said Finland lacks a simple, famous flagship equivalent to Norway's Fjords or Iceland's Golden Circle, which means the destination often needs more explanation and more compelling imagery for consumers
- While awareness of Finland exists, it is often broad but shallow, with clients recognising Lapland but not fully understanding the wider destination
- Competitor destinations benefit from stronger storytelling, clearer narratives and recognisable "icons", making them easier for consumers to understand and choose

Overall, Finland is ultimately seen as a winter first destination whereas summer awareness is weaker and less defined.

Operators indicated that Finland's issue is not a lack of product, but the absence of a clear and immediately compelling consumer proposition, combined with weaker storytelling narrative and fewer recognisable 'hooks' than competitors.



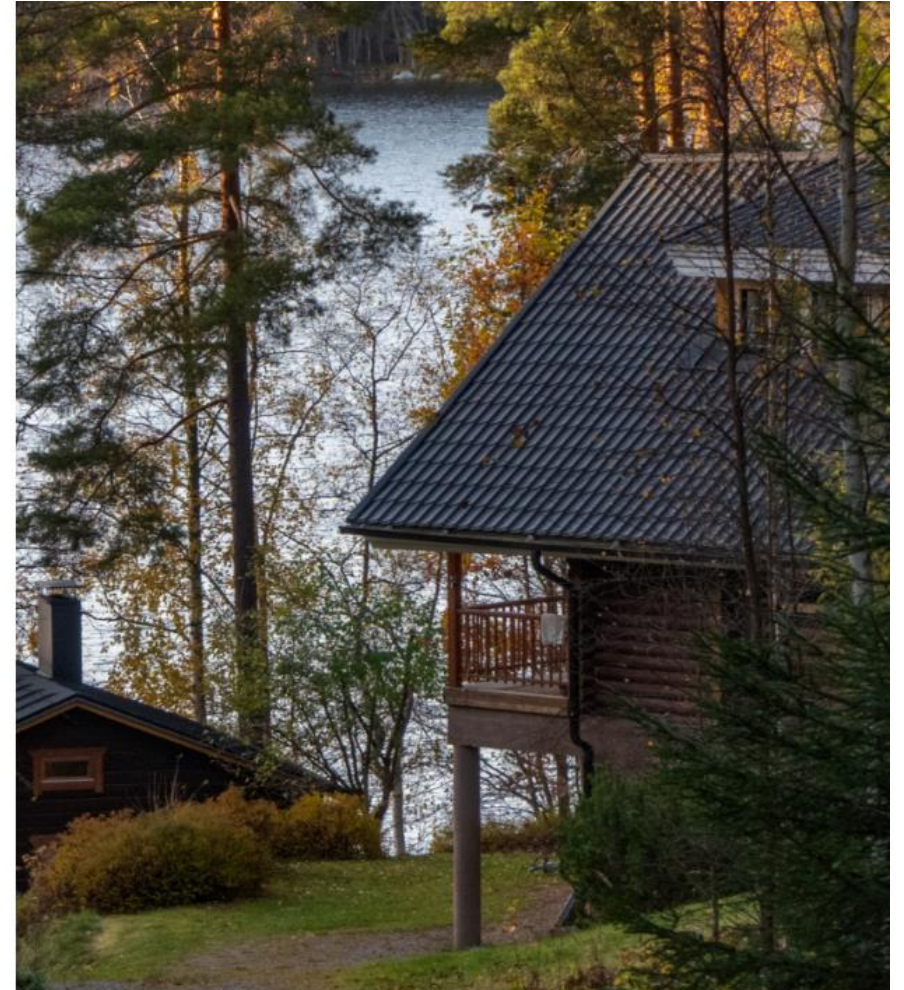
Why our competitors are winning and what we can learn from them?

Key insights gathered:

- **Norway** is the largest competitor for Finland. It offers:
 - Stronger hero product such as fjords, mountains, coast
 - Broader and more obvious year round offering and product versatility
 - Stronger tourism board marketing and investment to drive year round demand
- **Iceland** also performs strongly. It offers:
 - Clear, marketable flagship routes
 - Clarity to visitors looking for standalone itineraries
- **Sweden** often sits somewhere between:
 - A complementary destination to Finland rather than a direct substitute AND
 - Not being considered by first time travellers to Scandinavia
- **Finland**, by contrast, is often considered as part of a wider Nordic itinerary

Overall, competitor destinations benefit from stronger storytelling, iconic experiences and clearer reasons to visit.

This makes these destinations easier for consumers to engage with and for operators to sell. Further to this, operators cited stronger tourism infrastructure in competitor destinations.



Distribution channels

No of TOs: ~ 2000
No of Agencies: ~ 5000

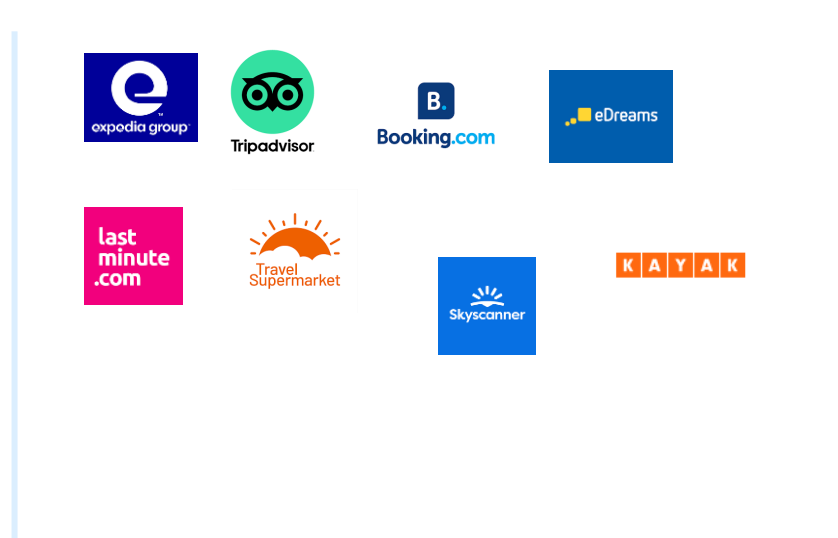
Lapland focused



Specialist TOs



Online channels



Agencies / home-working franchise

Hays Travel		Travel Counsellors		Barrhead		The Travel Franchise / Not Just Travel
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Consortias

Advantage Travel Partnership		Hays Travel Independence Group		Travel Network Group		Elite Travel Group
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Travel trends 2026

BBC, Hays Travel, YouGov etc..

- **Coolcationing and Quietcations**
 - **Cooler Climates:** Breezy northern spots like the Scottish Highlands or Iceland.
 - **Quietcations (or “hushpitality”):** People seek silence, nature resets, and lesser-known rural locations rather than overcrowded tourist hubs.
- **Slow Travel – Taking Time to Truly Experience and genuinely connect**
 - **Rail Growth:** Train bookings spike as holidaymakers look for scenic, lower-stress ground transit.
 - **Road trips with a luxury twist:** Pairing Michelin-starred dining with curated lifestyle stops
- **Culture and Connection**
 - **Bookbound & Set-Jetting:** Trips inspired by literature, TV shows, and film locations continue to drive destination choices.
 - **Multi-Generational Trips:** Whole-family holidays involving grandparents, parents, and children under one roof remain a top priority.
- **Wellness Travel – Recharge, Rebalance, Reconnect**
 - Blending mindful moments with real-world rejuvenation, sound baths, nutrition-led menus, forest bathing, spa circuits, digital detoxes and sleep-optimised suites.

2026 VF activities

H1, what has been done (B2B(2C))

B2B events:

- Feb / 5 countries workshop
- April / Eastern Finland workshop
- June / Midnight Sun workshop

FAM-trips:

- Jan / MATKA
- June / Midnight Sun pre-tours
- **Sept** / Lakeland Peaks

Joint Promotions:

- Regent Holidays, Lakeland summer
- Discover The World, Lakeland summer
- TripAdvisor (European multimarket), Lakeland summer
- eDreams (European multimarket), City Circuit



And what is yet to come in H2... (B2B)



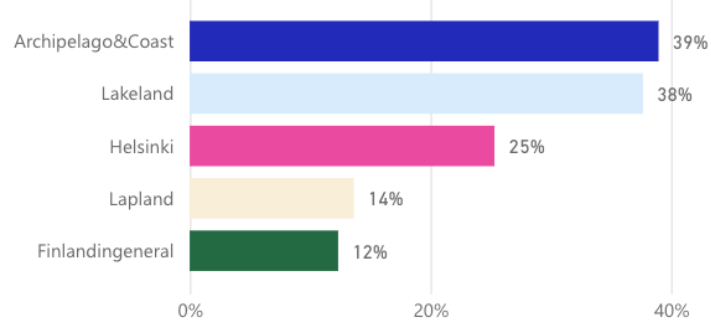
We are soooooo back!

- Joint Nordic stand with Denmark and Norway
- 44 stand sharers
- 22 from Finland

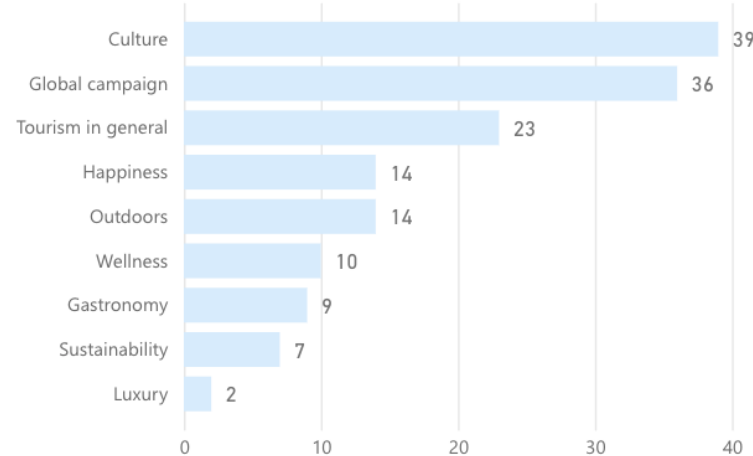
PR Update, Jan-July 2026

Project: All | Number of hits: 154 | Average Visibility Score: 64 % | Total Brand Building Effect: 1.8bn | Average of Tone: 2.99 | Average Prominence: 4.54 | Total Publicity Value: 3M €

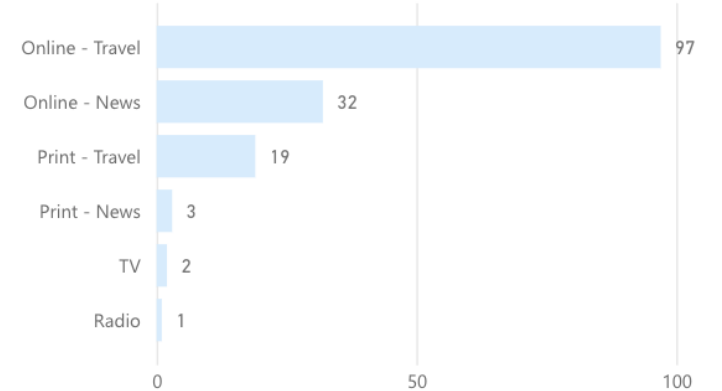
Share by Region



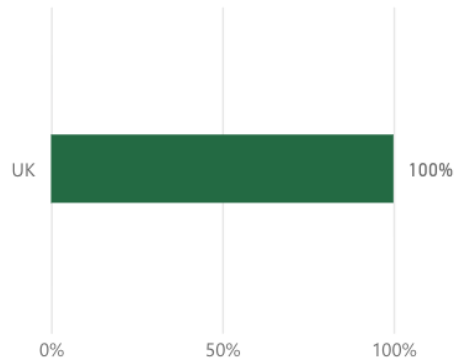
Number of hits by Theme



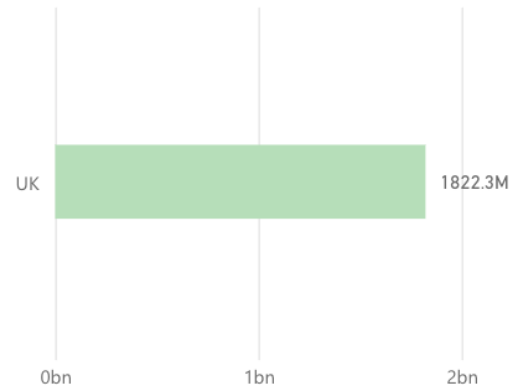
Number of hits by Media type



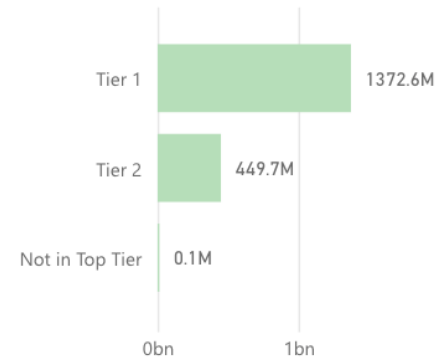
Share of hits by Country



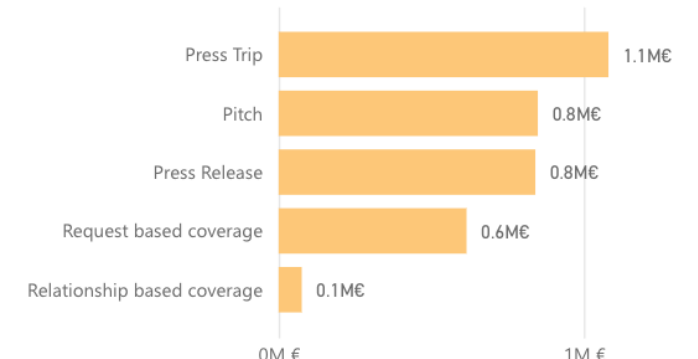
Brand Building Effect by Country



Brand Building Effect by Media Relevance



Publicity Value by Origin



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The easy Nordic road trip you can do over a long weekend

Explore Finland's remote Saaristo archipelago, and you'll find subarctic vineyards, astonishing landscapes and chic B&Bs — all in the space of a mini-break

I took the kids to Lapland... at Easter. Here's what happened

Santa's nowhere to be seen, but there are sleigh rides, huskies and elves celebrating spring — and it's a crowd-free, more affordable time to visit

This is my favourite place to stay in Helsinki – and you can get a room for under £100

In the heart of the Finnish capital, **Annabel Grossman** checks into Hotel Hobo and discovers a colourful, community-focused spot that offers real value for money

MICHELIN GUIDE

Nordic Summer Beaches: 6 Escapes With Must-Try Restaurants Nearby

Wanderlust

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Finland
Aalto Works

Photo: Alamy

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THE TIMES

20 of the best city breaks for solo travellers

The 25 best European cities to visit this summer



INDEPENDENT

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'Exploring Finland with our baby was a delight'



Finland is inviting people to this summer's most unique dinner party – here's how to be there

Finland just launched its first-ever national tasting experience, and anyone, from anywhere, can apply for one of 16 seats



The 10 lakes you must visit in your lifetime



LITTLE KNOWN The 10 under-the-radar destinations to visit this summer from tiny European islands to barely visited seaside cities

Finland's former capital city Turku came out on top



Europe's secret lakes—6 destinations without the crowds

You could win an all-expenses-paid foodie trip to Finland this summer – here's how to apply

These trips will 'engage all the senses', and have been curated by local culinary legends



What I still wanted to say...

- VF Market planning for 2027 is ongoing, market plans will be published in October/November
 - Heavy focus in summer promotion in everything we do at the market
 - Happy to hear your thoughts! :)
- Visit Finland will invest into a stronger market presence, focus in promoting summer
- **Watch this space!** UK tour operators constantly report receiving more and more bookings from **US and AUS markets**
- **Stay alert** on **EES and ETIAS** development – most likely you will receive questions
- **VF.fi market site updated**, read more about UK market: <https://www.visitfinland.fi/toiminta-markkinoilla/iso-britannia/>
- Recording and material will be published on VF.fi, including the full **UK trade audit report**

