



Visit Finland

VF monthly follow up

January – December 2023



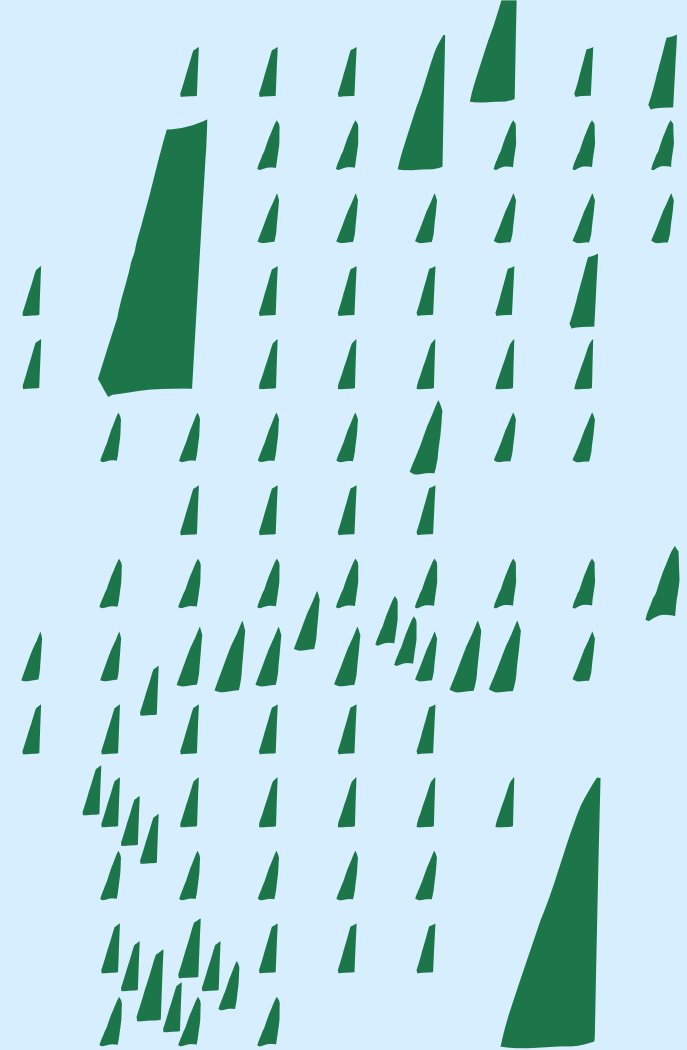
Summary

Travel to Finland and to the Nordics compared to previous year and pre-pandemic

- According to our **Border survey** (Matkailijamittari), the total number of trips to Finland by foreign visitors was **3.9 million** during **March-December 2023** and the total amount the visitors spent in Finland was **3,132M€**. The median length of stay was **4 nights**, and **73%** of the visitors were travelling for **leisure**.
- **Number of registered foreign overnights** in 2023 were **15% above the figures of 2022**, but still **19% below** the **2019** level. If we leave the Russian travellers out of scope, the overnights were 18% above 2022 and 9% behind 2019 figures.
 - **Germany, UK, and Sweden** were the biggest source markets for registered overnights.
 - Recovered main source markets in 2023: **Germany, UK, USA, France, the Netherlands, Italy, Spain, Belgium, and Austria**.
- In August 2023, the number of **foreign overnights in short-term rentals hit a new record** with nearly 276,000 overnights. That was **31% of the total foreign paid overnights in Finland**. *Statistics for short-term rentals are available until Sep-2023 at the moment.*
 - In overall, slightly **more than every fifth paid foreign overnight** is spent in a **short-term rental accommodation**.
 - Among the most visited destinations in **2022**, **Turku, Rovaniemi, Oulu, Jyväskylä, and Kittilä-Levi** had the biggest shares of short-term rental overnights.
- Comparison with **the registered overnights in the Nordics** shows that **Finland's recovery has been clearly slower** than in the other Nordic countries due to the big impact Russian and the Asian travellers had on travel to Finland pre-pandemic.
 - Travel to Denmark, Iceland, and Norway has totally recovered.
 - **Finland's and Sweden's market shares of foreign overnights have decreased**, while Denmark and Iceland have both gained more market share.
- **International flight bookings to Finland** for the spring months of March - May show a **good increase compared to 2023**. *When comparing to pre-pandemic, the total int'l bookings are at the same level.*
 - Total int'l bookings to Norway and Sweden for the spring months are growing even stronger than to Finland.
- **Seat capacity to Finland** for the spring months of March – May is **12% above 2023 level**, but still **-18% compared to the pre-pandemic level**.
 - Seat capacity from **Europe and Asia** is improving compared to **previous year**.

Border Survey Comparison with Q3 and Q4 2023

- When comparing Q3 and Q4 results for **leisure travellers**, we can notice that even though there are clearly **more trips to Finland in Jul-Sep** than in **Oct-Dec**, the total spend is not that much smaller in Q4. In fact, **leisure travellers spent much more per trip and per day in Q4** than in **Q3**.
- Regarding the **carbon footprint among leisure travellers**, it was also higher per trip and per day in Q4 than in Q3, but the difference was not so significant as it was for spending.
- Leisure travellers from **Switzerland in Q3** had the longest median length of stay (10 nights). Swiss were also **among the biggest spenders per trip**. Their **carbon footprint per day was also among the lowest** in Q3, so from sustainability point of view that was a perfect combination, and the **carbon efficiency (€/CO2)** was among the best for Swiss visitors. Similarly, visitors from **France** tend to have longer stays as well as good carbon efficiency.
- It becomes more controversial when we look at the **long-haul markets**. Their **CO2 per trip and per day is among the highest**, but at the same time **they rank also in top markets with spend per trip and day**. In addition, leisure travellers from **USA** and **Australia** tend to **stay longer** in Finland than visitors in average.
- **Germany** was among the biggest country of origin **in trips to Finland**, and it was also among the countries with **the biggest total spend** both in **Q3** and **Q4**.
- In general, **leisure travellers in Q4** booked their trips earlier than visitors in Q3. They also bought clearly more often package trips and travelled to Finland by airplane.



Comparison with Q3 and Q4 2023 results

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

Foreign leisure travellers in Finland

TRIPS (leisure)	Q3-2023 (Jul-Sep)	Q4-2023 (Oct-Dec)
Trips	1,247K	677K
Adv. booking	2.6 mths	3.6 mths
Package trips	5%	18%
Air/Ferry	58%/42%	68%/32%
Median lgth of stay	4 nights	4 nights
Main source markets	Sweden Germany Estonia USA	UK Estonia Germany Sweden
Longest median length of stay (among countries with more than 10K trips)	Switzerland France Australia	France USA Australia Netherlands Latvia

SPEND (leisure)	Q3-2023 (Jul-Sep)	Q4-2023 (Oct-Dec)
Total spend	840M€	635M€
Spend per trip	674€	937€
Spend per day	58€	87€
Biggest total spend	USA Germany Sweden	UK France Germany
Biggest spend per trip (among countries with more than 10K trips)	Australia Switzerland China USA	Australia France China Italy USA Spain
Biggest spend per day (among countries with more than 10K trips)	China Japan South Korea Australia	Japan Australia Ireland UK
€/CO2 Best Carbon Efficiency (leisure)	Estonia Switzerland Netherlands	Estonia France Ireland

CO2 (leisure)	Q3-2023 (Jul-Sep)	Q4-2023 (Oct-Dec)
Total CO2 (kg)	576K	343K
CO2 per trip	462	506
CO2 per day	40	47
Biggest total CO2	USA Germany Spain Sweden	UK USA
Biggest CO2 per trip (among countries with more than 10K trips)	Australia USA Canada Japan South Korea	Australia China Japan USA Spain France
Biggest CO2 per day (among countries with more than 10K trips)	Japan Korea China Australia Canada USA	Japan Australia UK Ireland Italy USA

Border Survey / March-December 2023

Foreign visitors in Finland

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

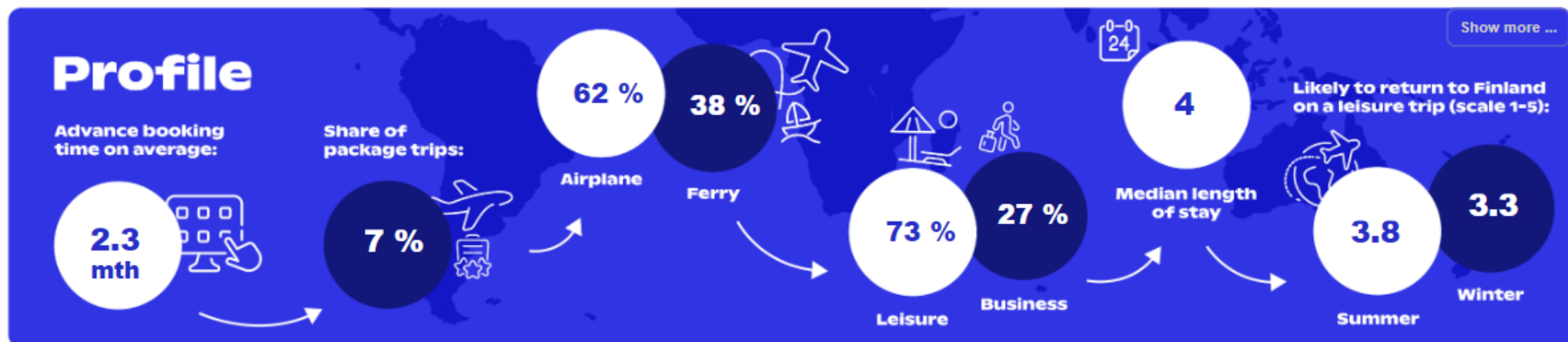
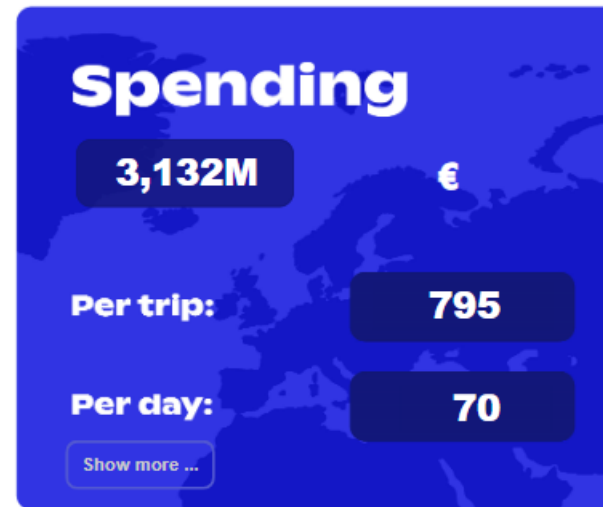
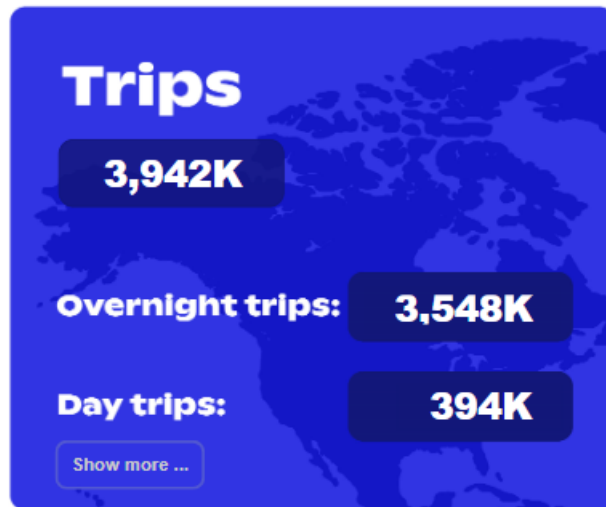
Border Survey
Matkailijamittari
Visit Finland

Year: All
Quarter: All
Month: All

Departure Countries: All
Travel Destinations: All
Travel Type: All

Start date: 03/2023
End date: 12/2023

Map FI EN



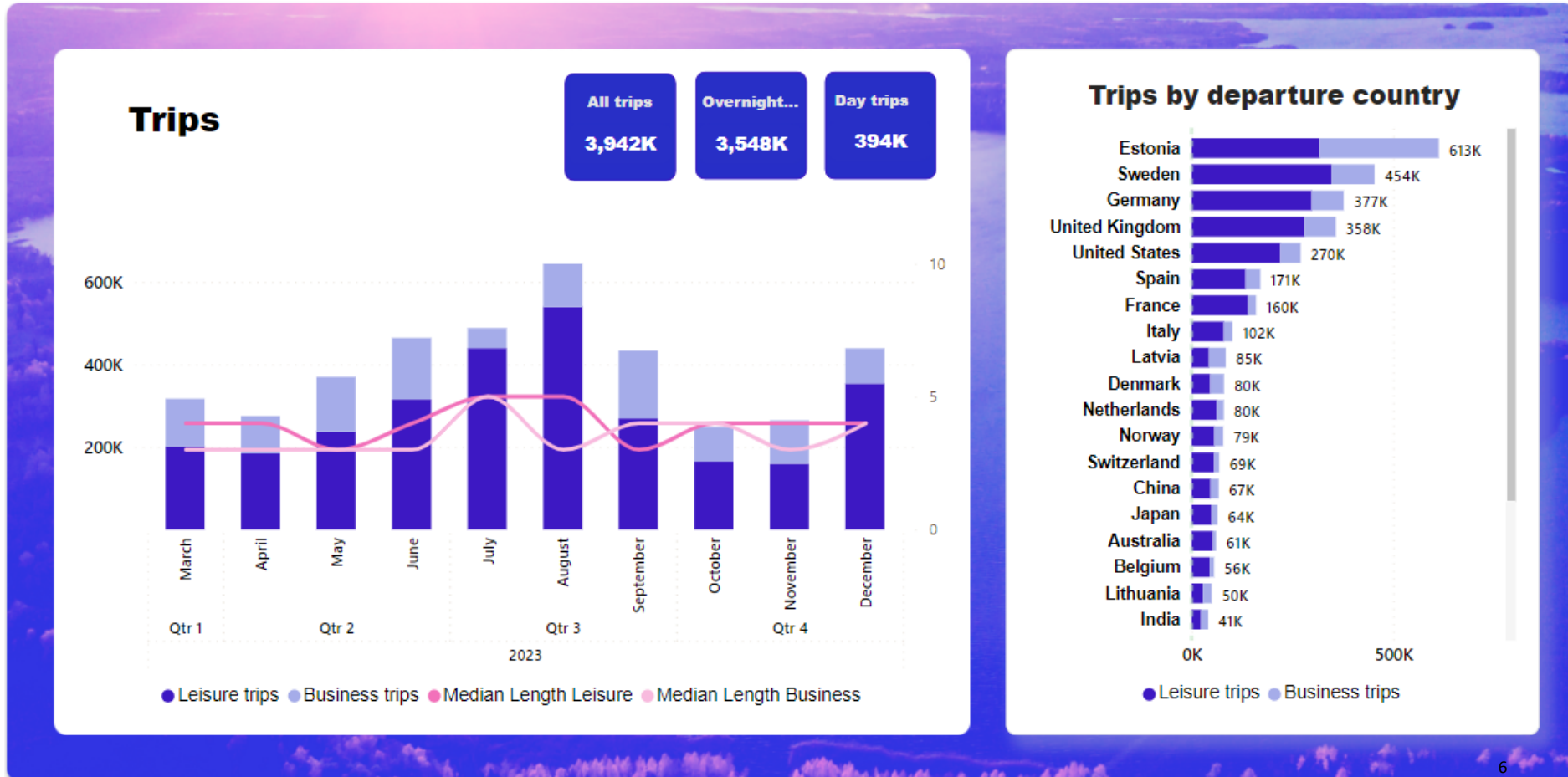
Trips / departure from Finland in March-December 2023

Foreign visitors in Finland

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



- **August** was clearly the busiest month with departing visitors
- **Leisure travel** is strongest in **August** and **July**. However, **December** seems to be slightly more popular travel month for leisure travellers than **June**.
- **Median length of stay on leisure trips** has been at the longest in July and August
- **Swedes** are leading by the number of **leisure trips to Finland**, followed by **Estonians, Germans, British,** and **Americans**



Spending in Finland / March-December 2023

Foreign visitors in Finland

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


MatkailijaMittari
 Visit Finland

Year: All | Quarter: All | Month: All

Departure Countries: All | Travel Destinations: All | Travel Type: All

Start date: 03/2023 | End date: 12/2023

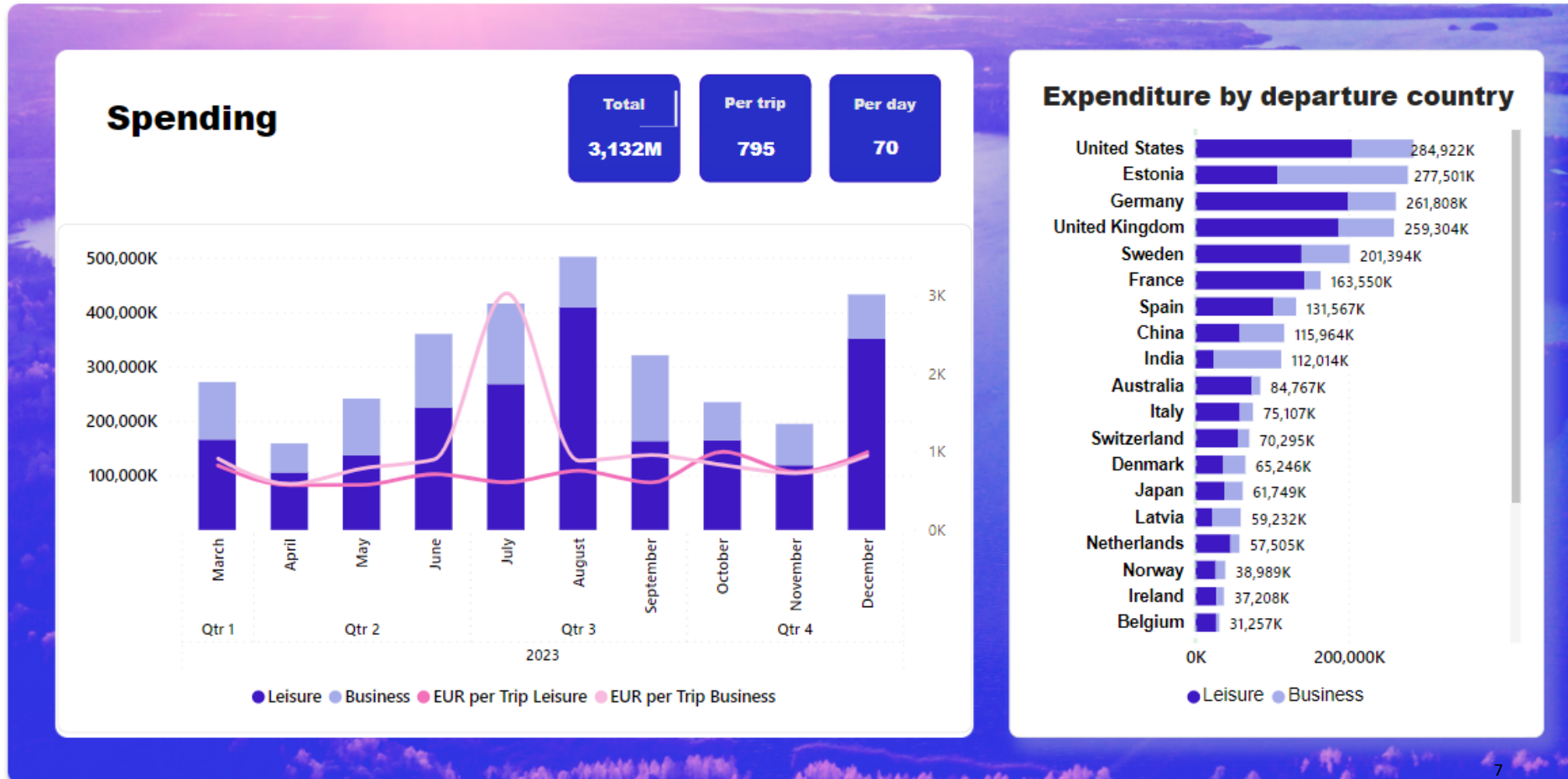
[Home](#) [Map](#)

- Even though the number of trips in December was clearly lower than in August, **total spend in December** comes much closer to August figures.

- In December, spend **per trip** was **985€** and **per day** **94€**. In August, the corresponding spend amounts were 780€ per trip and 57€ per day.

- Spending per day on a leisure trip** has been at the highest level in **March (119€)** and in **December (110€)**.

- Total spending on leisure trips** has been highest for **US** visitors, followed by **German** and **British** visitors.



Carbon Footprint / March-December 2023

Foreign visitors in Finland

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

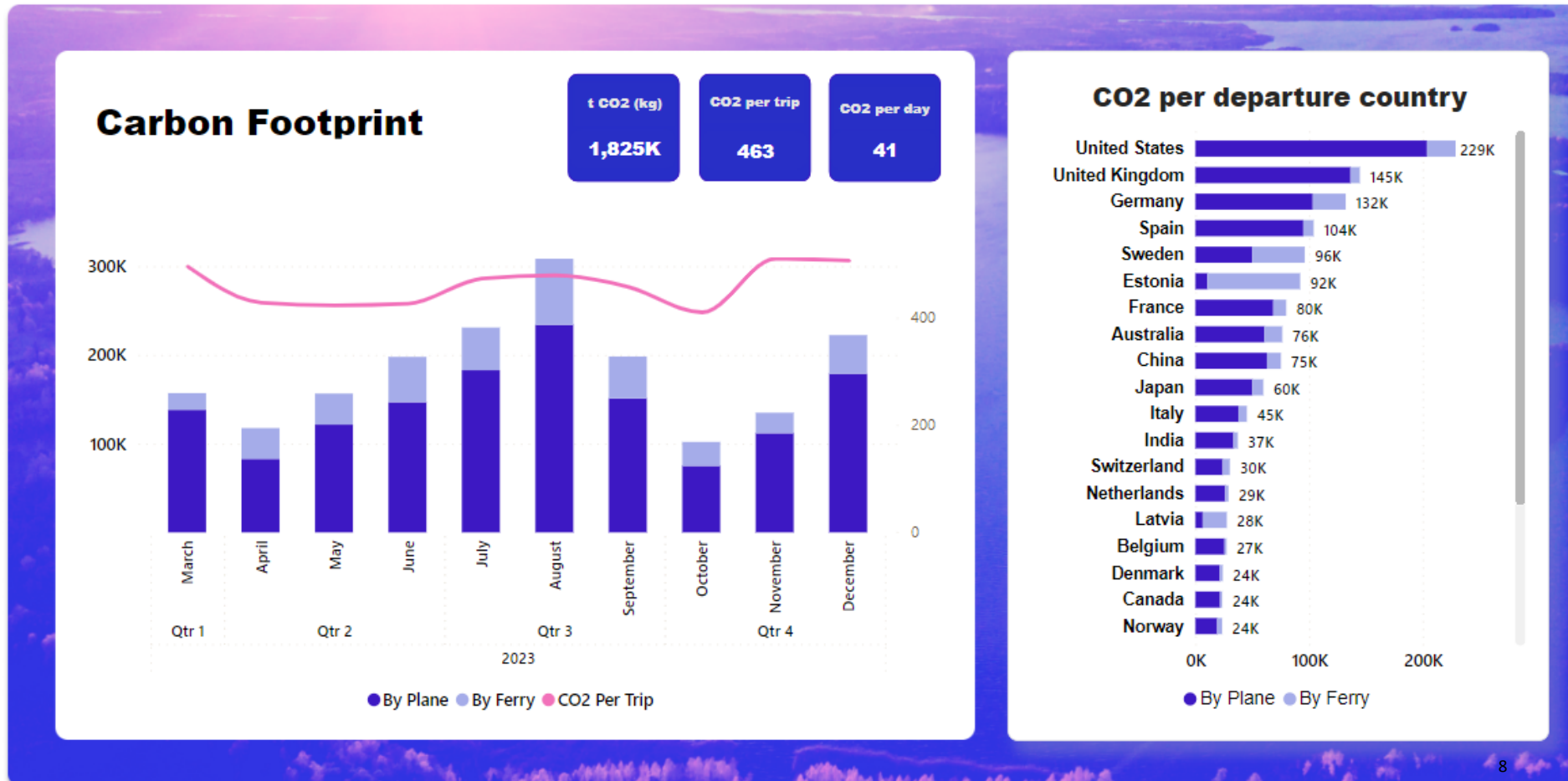

MatkailijaMittari
 Visit Finland

Year:
 Quarter:
 Month:

Departure Countries:
 Travel Destinations:
 Travel Type:
 Start date:
 End date:

[Home](#)
[Map](#)

- **Carbon footprint** has been on the highest level in August so far, as is has also been the busiest travel month.
- However, **carbon footprint per trip** reaches the highest levels during the winter months when the **share of air travel is higher than in summer.**
- Total carbon footprint was clearly highest for **US** visitors, followed by **German** and **British** visitors



Foreign registered overnights & flight statistics

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

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

Registered overnights

Flight arrivals / bookings*

Seat capacity

Monthly view

780,200

+6% (-1%)

Dec/23 foreign overnights in FIN



95,500

+12% (-12%)

Jan/24 int'l flight arrivals to FIN



106,000

+20% (-3%)

Feb/24 outlook for int'l flight bookings to FIN



749,400

+4% (-22%)

Jan/24 flight seat capacity to FIN



716,200

+10% (-18%)

Feb/24 outlook for seat capacity to FIN



Several months' view

5.7M

+15% (-19%)

Year 2023 foreign overnights in FIN



642,300

+20% (-23%)

08-12/23 – 01/24 (6 mths) arrivals to FIN



225,100

+22% (-2%)

02-07/24 (6 mths) outlook for flight bookings to FIN



3.9M

+8% (-23%)

09-12/23 – 01/24 (5 mths) flight seat capacity to FIN



4.2M

+12% (-17%)

02-06/24 (5 mths) outlook for seat capacity to FIN



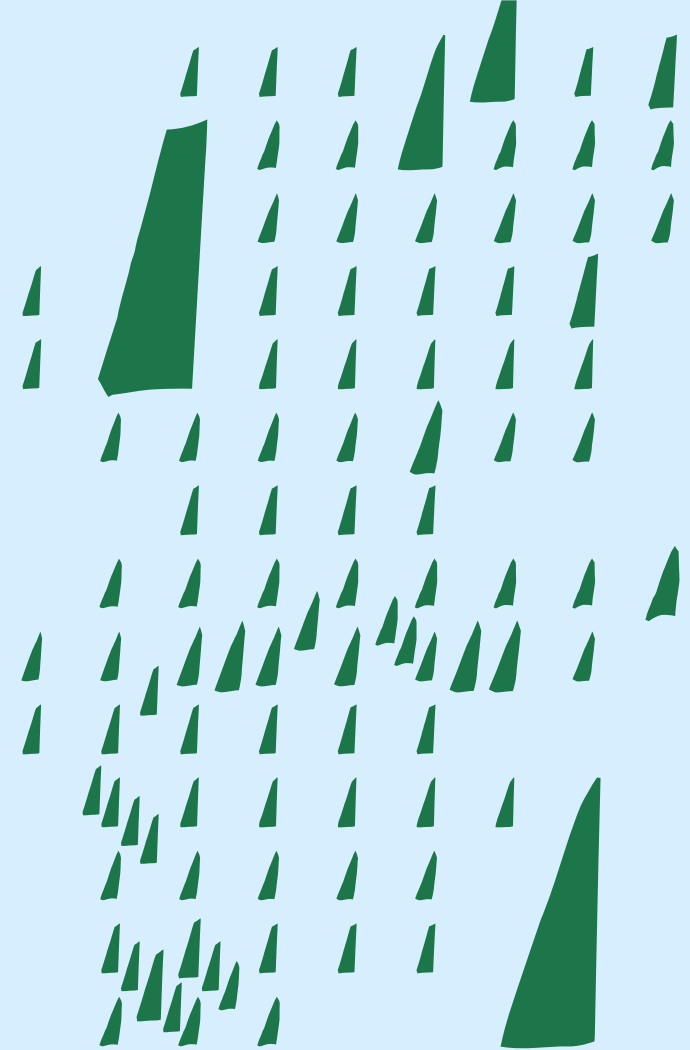
Registered overnights

- December

- Foreign overnights: **780,200** (+6% vs. Dec/22 & -1% vs. Dec/19)
- Foreign excl. Russia: **778,600** (+7% vs. Dec/22 & +9% vs. Dec/19)
- Top source markets: **UK, France, Spain, Germany**
- Top destinations:
Helsinki, Rovaniemi, Inari-Saariselkä, Kittilä-Levi, Kolari-Ylläs, Kuusamo

- Year 2023

- Foreign overnights: **5.7M** (+15% vs. year 2022 & -19% vs. year 2019)
- Foreign excl. Russia: **5.7M** (+18% vs. year 2022 & -9% vs. year 2019)
- Top source markets: **Germany, UK, Sweden, USA, France, the Netherlands**
- Top destinations (more than 100,000 yearly overnights):
Helsinki, Rovaniemi, Vantaa, Inari-Saariselkä, Kittilä-Levi, Tampere, Espoo, Kolari-Ylläs, Turku, Kuusamo, Sodankylä



Registered overnights year 2023

	Year 2023	Change-% vs. year 2022	Change-% vs. year 2019
Total	22.8M	+4%	-1%
Domestic	17.1M	+1%	+6%
Foreign, total	5.7M	+15%	-19%
Foreign excl. Russia	5.7M	+18%	-9%
Russia	40,200	-74%	-95%
Scandinavia	790,000	+7%	-11%
EU-27 + UK	3.8M	+11%	0%
America	506,000	+40%	+16%
Asia	647,100	+55%	-47%

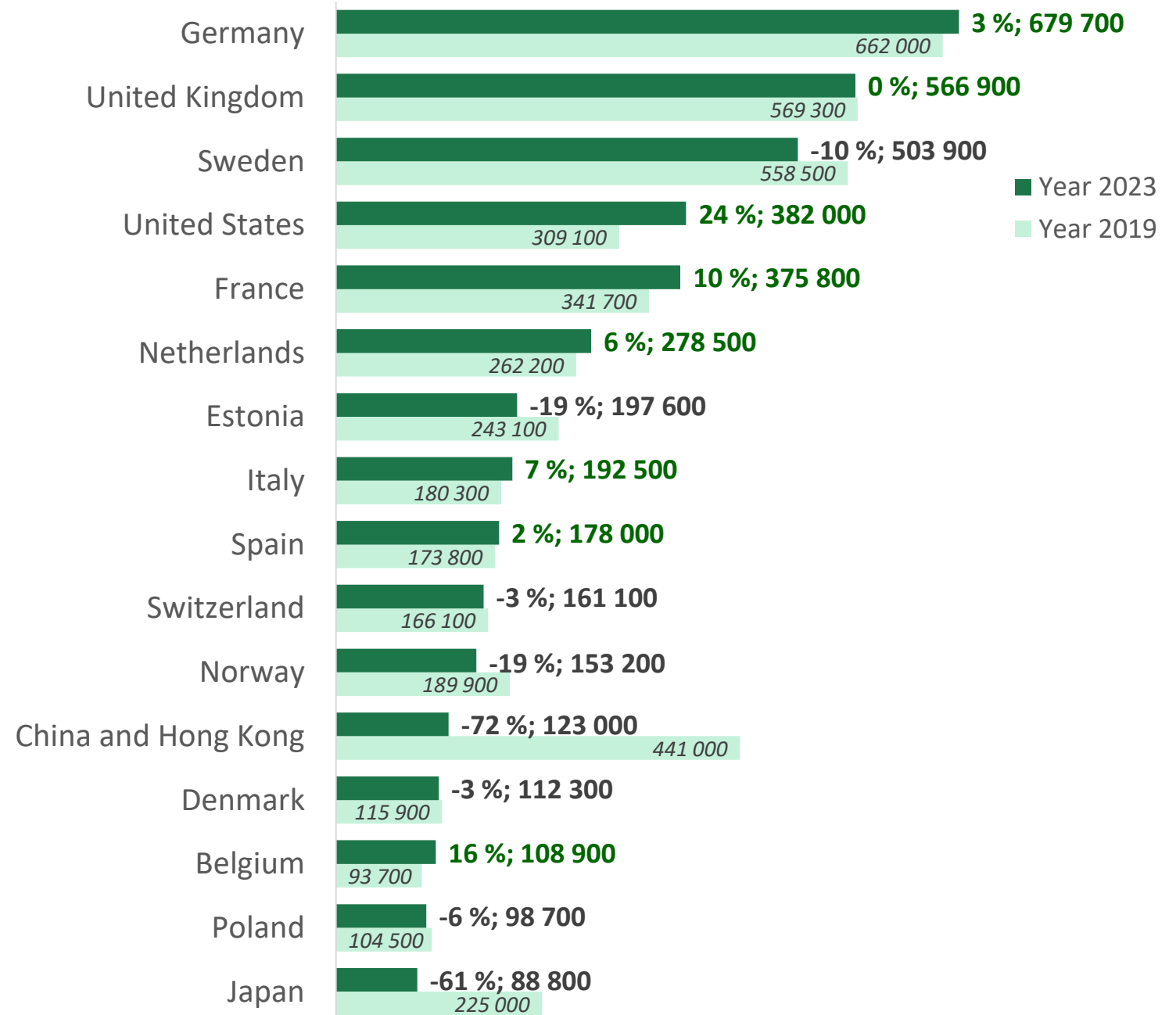


Top16 origin countries

Year 2023 vs.
Year 2019

In 2023, number of overnights reached or exceeded the 2019 level from these biggest source markets:

- Germany & Austria
- UK
- USA
- France
- Benelux countries
- Italy
- Spain





Year

- 2018
- 2019
- 2020
- 2021
- 2022
- Latest
- 2024

Year month

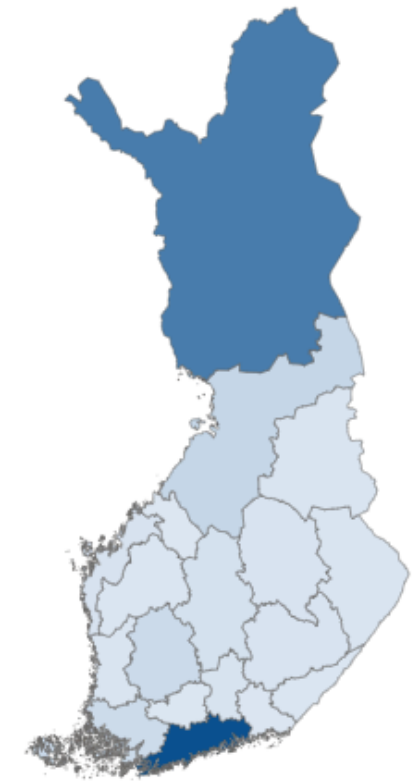
- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

Overnights 22,8 milj. TOTAL overnights	YoY change % 4 YoY change %	Foreign 5,7 milj. Overnights	YoY change % 15,4 Foreign	Domestic 17,1 milj. Overnights	YoY change % 1 Domestic	Revenue 1,5 mrd. TOTAL revenue	YoY change % 9 YoY change %
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View Main regions, Regions by

- Domestic
- Foreign

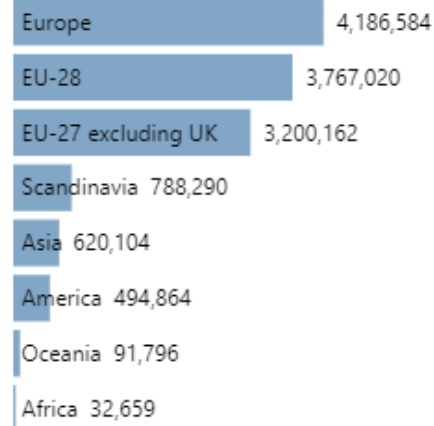
REGIONAL OVERNIGHTS



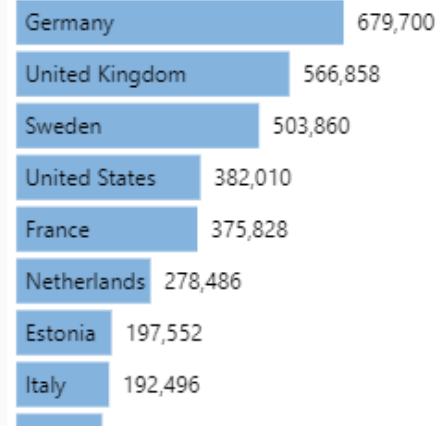
VIEW REVENUE DETAILS

VIEW OVERNIGHT DETAILS

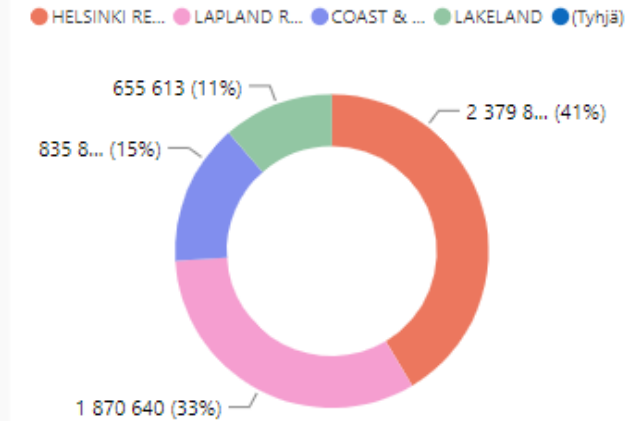
OVERNIGHTS FOREIGN REGION 2023, 202301-202312



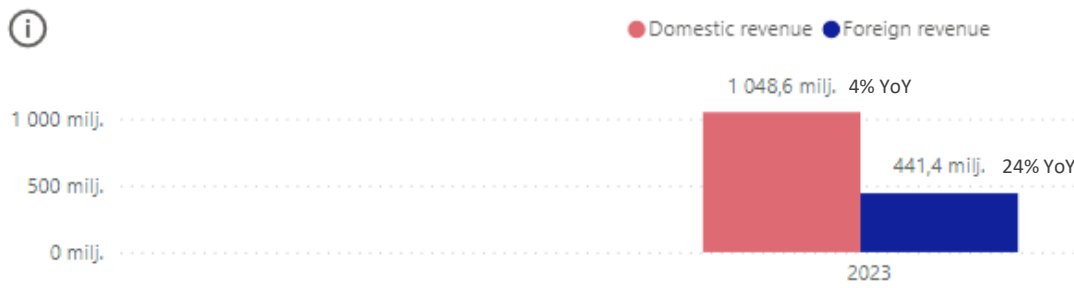
OVERNIGHTS BY COUNTRY YEAR 2023, 202301-202312



OVERNIGHTS IN MAIN REGIONS YEAR 2023, 202301-202312



REVENUE 2023



Sources: Statistics Service Rudolf, Statistics Finland



Year: 2018, 2019, 2020, 2021, 2022, Latest, 2024

Year month: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

Main area: All, Region: All, Sub-region: All, Municipality: All

REVERT TO DEFAULT

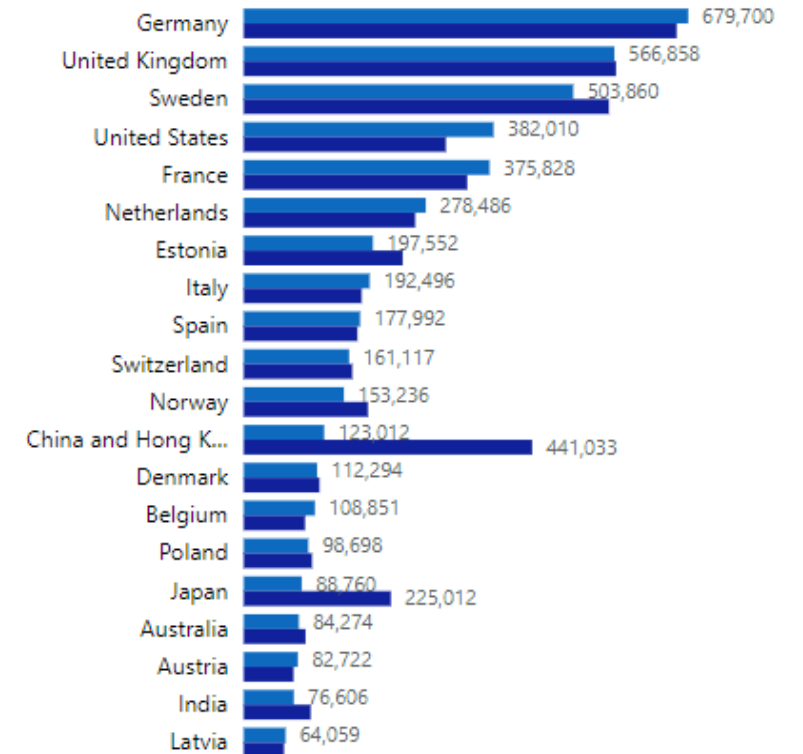
REGION VIEW FOREIGN REGION VIEW

FOREIGN OVERNIGHTS 2023 compared to 2019 months 1-12

Main area	2023 MAX year	2019 MIN year	Change %
HELSINKI REGION	2,379,819	3,044,543	-21.8
LAPLAND REGION	1,870,640	1,777,618	5.2
COAST & ARCHIPELAGO	835,884	1,085,858	-23.0
Åland	206,132	225,743	-8.7
Southwest Finland	193,259	265,965	-27.3
North Ostrobothnia (excl. Kuusamo)	150,359	165,428	-9.1
Uusimaa 2 (excl. Helsinki Metropolitan Area)	85,422	164,649	-48.1
Ostrobothnia	74,870	83,081	-9.9
Satakunta	50,339	57,465	-12.4
South Ostrobothnia	32,514	45,665	-28.8
Kymenlaakso	26,129	53,856	-51.5
Central Ostrobothnia	16,860	24,006	-29.8
LAKELAND	655,613	1,147,978	-42.9
Pirkanmaa	211,492	221,125	-4.4
Central Finland	105,854	128,660	-17.7
Päijät-Häme	72,358	106,426	-32.0
North Savo	62,070	107,578	-42.3
South Savo	60,811	147,184	-58.7
North Karelia	41,532	71,363	-41.8
Kainuu	41,458	98,389	-57.9
South Karelia	36,595	235,516	-84.5
Kanta-Häme	23,443	31,737	-26.1
Total	5,741,956	7,055,997	-18.6

OVERNIGHTS 2023 compared to 2019 months 1-12

MAX year MIN year



Sources: Statistics Service Rudolf, Statistics Finland

Recovered destinations with over 20,000 overnights (over 100,000 in bold):

- Rovaniemi
- Inari-Saariselkä
- Kittilä-Levi
- Kolari-Ylläs
- Muonio
- Enontekiö
- Pelkosenniemi
- Pudasjärvi-Syöte
- Pori
- Tampere

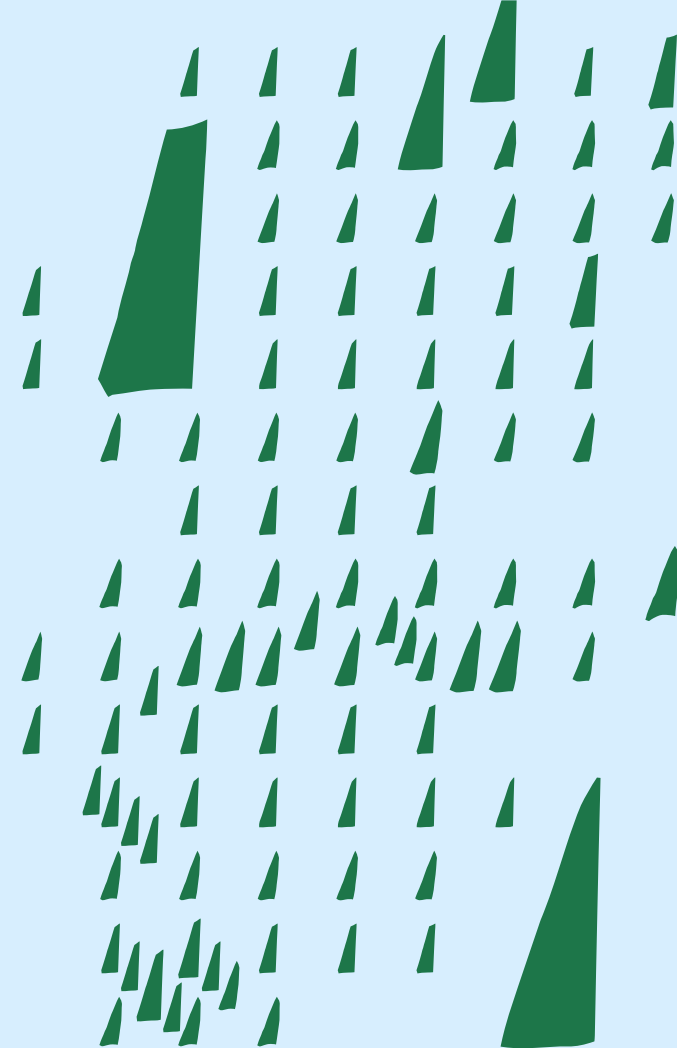
Overnights in short-term rentals

We have now an easy access to the **Eurostat statistics on overnights in short-term rentals** (collaborative economy platforms, e.g. Airbnb), and the new data tables have been published in [Visit Finland Statistics Service Rudolf](#) by Statistics Finland.

Publishing schedule is slower than the one for registered overnight statistics. **The most recent update was for the months of Q3 2023**, so that's why we have now the statistics available until September 2023.

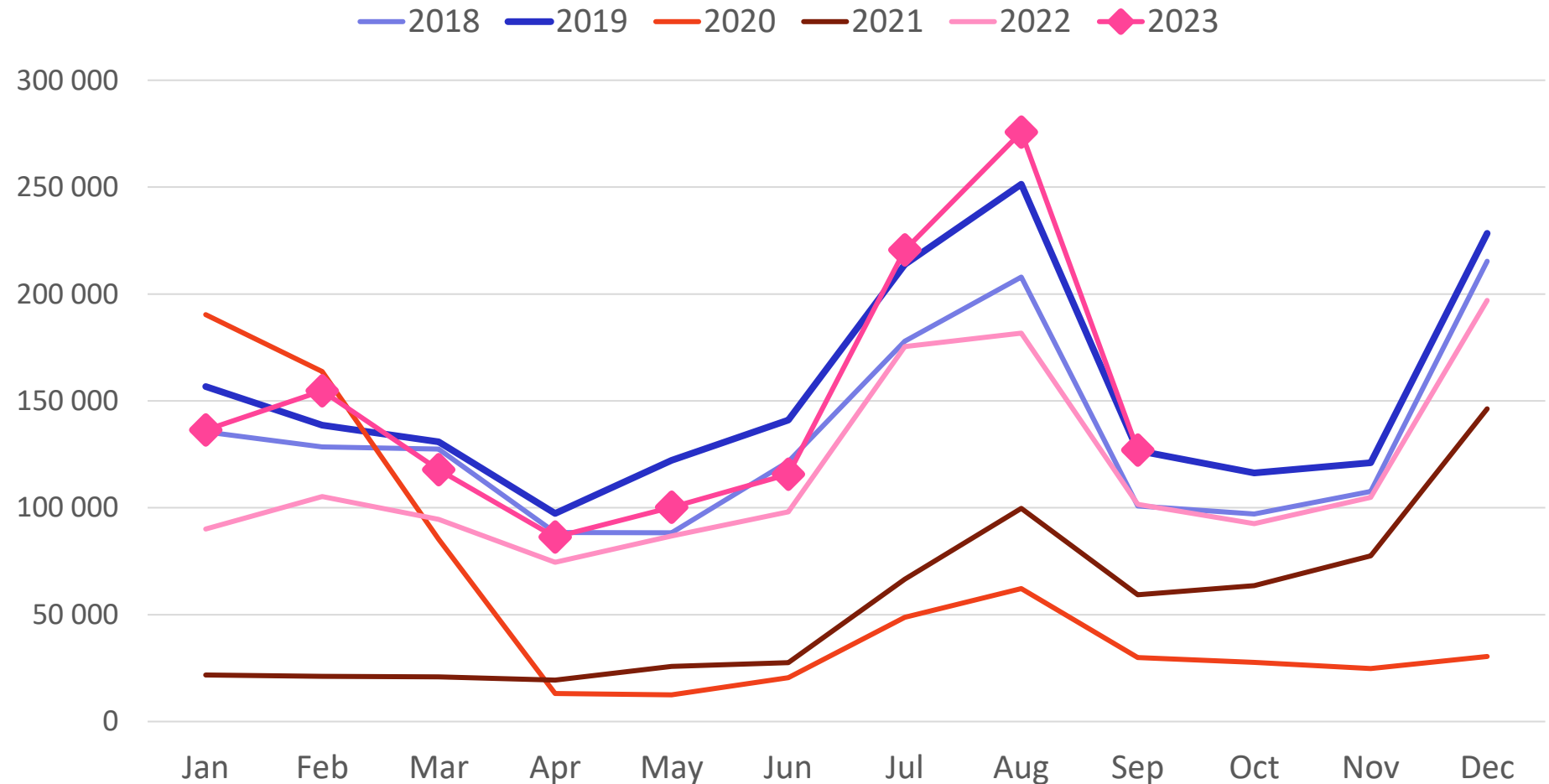
The monthly statistics shows us the aggregate level (total – domestic – foreign) of overnights, while source country and destination specific statistics are published only on a yearly basis.

- In **August 2023**, the number of foreign overnights in short-term rentals hit a new record with nearly 276,000 overnights. That was **31%** of the total foreign paid overnights in Finland.
- In overall, slightly more than **every fifth** paid foreign overnight is spent in a **short-term rental accommodation**.
- **American** and **European** travellers tend to use short-term rental more often than travellers from Asia.
- Among the most visited destinations in 2022, **Turku, Rovaniemi, Oulu, Jyväskylä,** and **Kittilä** had the biggest shares of short-term rental overnights.



Foreign overnights in short-term rentals (Airbnb etc. platforms)

Short-term rentals: Foreign overnights in Finland 2018-2023



Number of **foreign overnights in short-term rentals** exceeded the 2019 level again in July and especially in **August**, when the number of overnights reached nearly 276,000.

The share of overnights in short-term rentals was very high in August (31%).

Data is available until September 2023 at the moment.

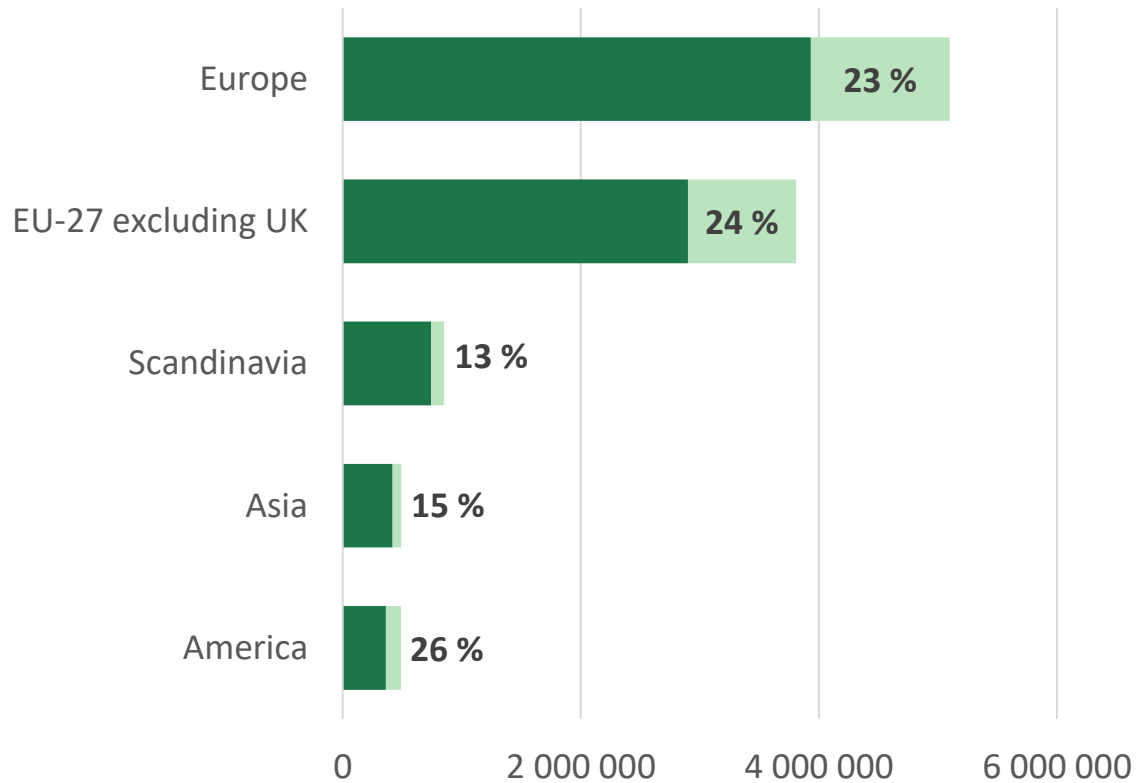
Registered and short-term rentals overnights in Finland - Year 2022

Foreign overnights 2022: **6.4M in total**

- Registered **5.0M (78%)**

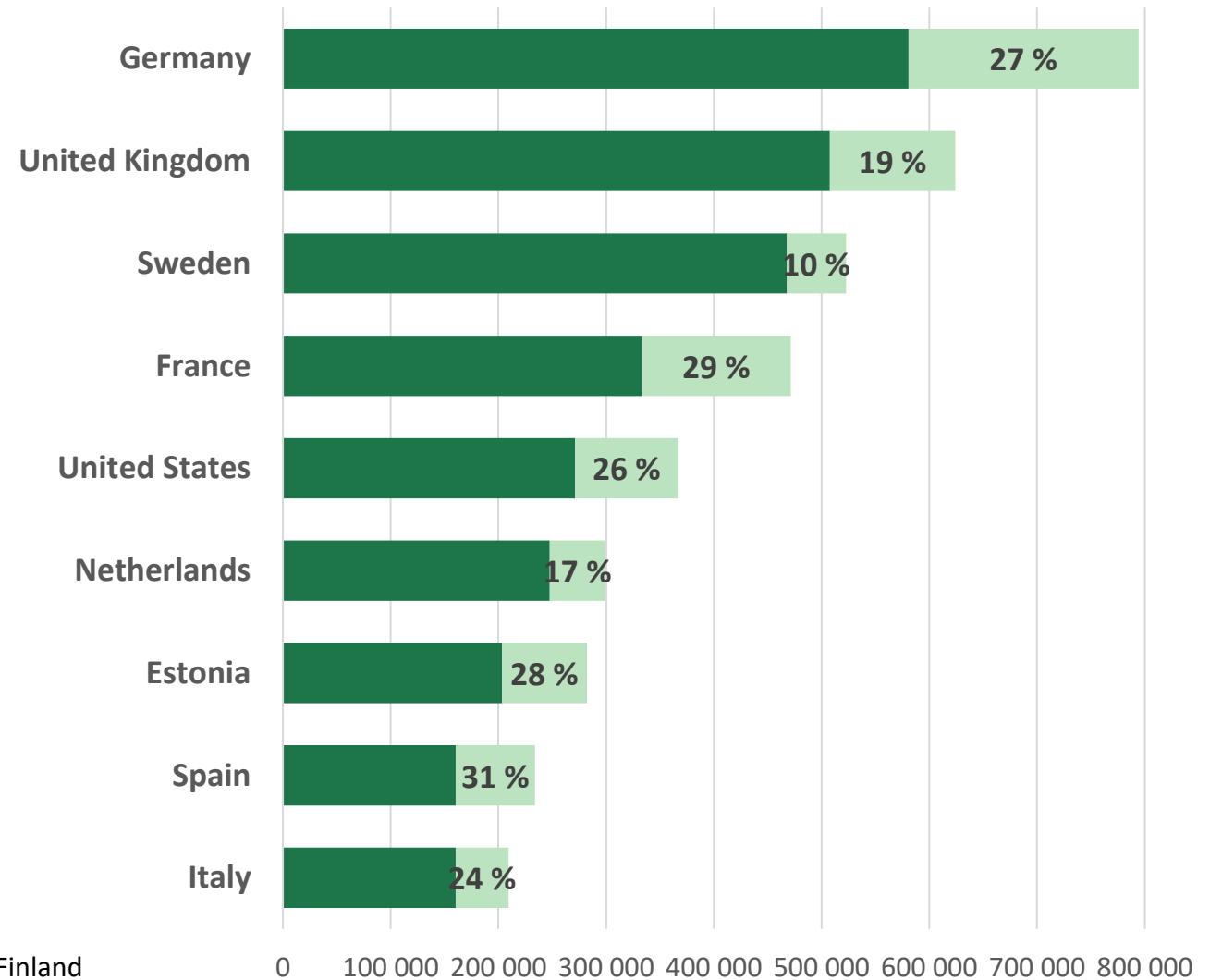
- Short-term rentals **1.4M (22%)**

Registered overnights Short-term rentals



Top source markets for overnights in Finland - Year 2022

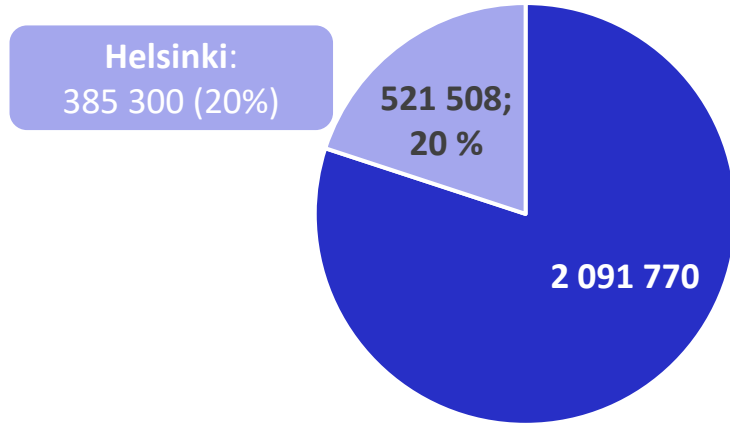
Registered overnights Short-term rentals



Registered and short-term rentals overnights in regions Year 2022

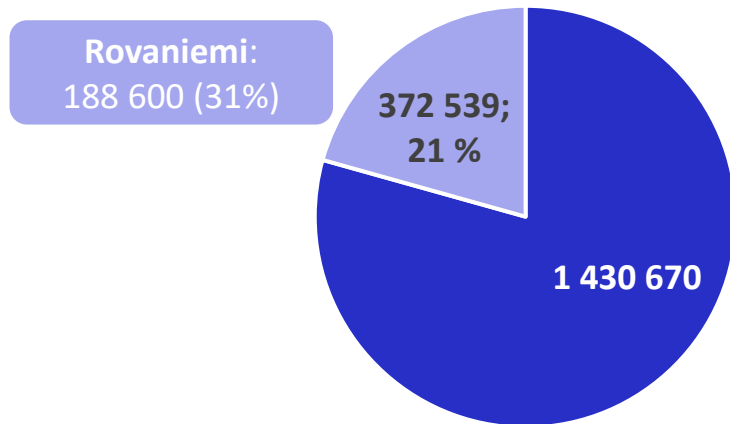
Uusimaa, foreign overnights in 2022

■ Registered overnights ■ Short-term rentals overnights



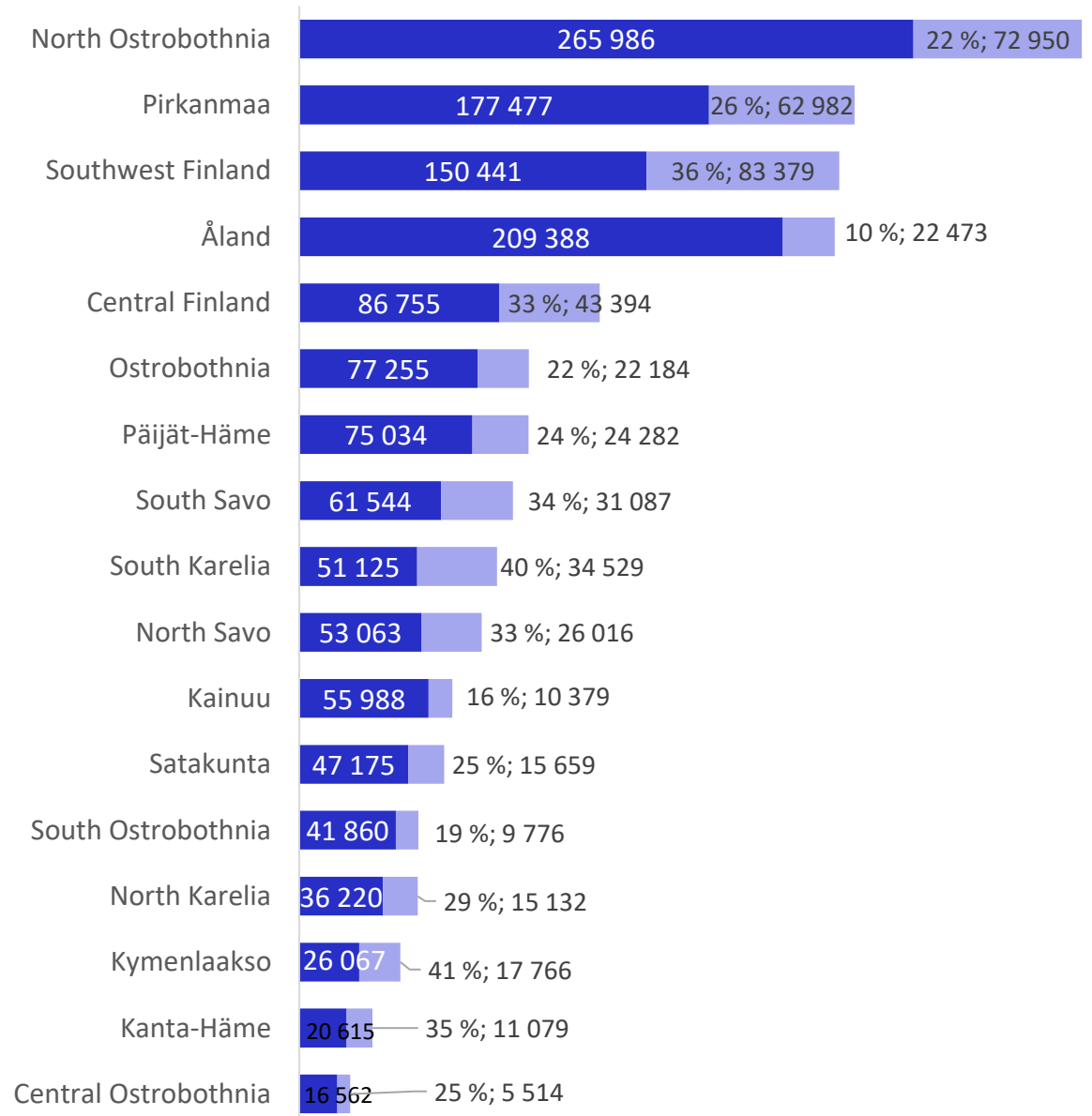
Lapland, foreign overnights in 2022

■ Registered overnights ■ Short-term rentals overnights



Foreign overnights in other Finnish regions - Year 2022

■ Registered overnights ■ Short-term rentals overnights

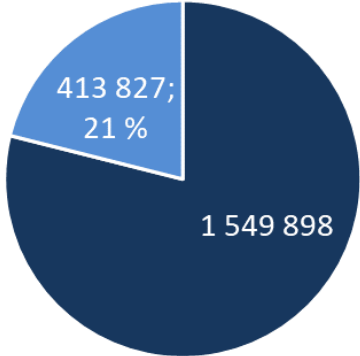


Registered and short-term rental overnights in the most popular travel destinations in Finland

Year 2022

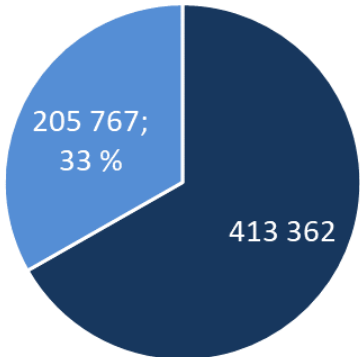
Helsinki, foreign overnights in 2022

Registered overnights Short-term rentals overnights



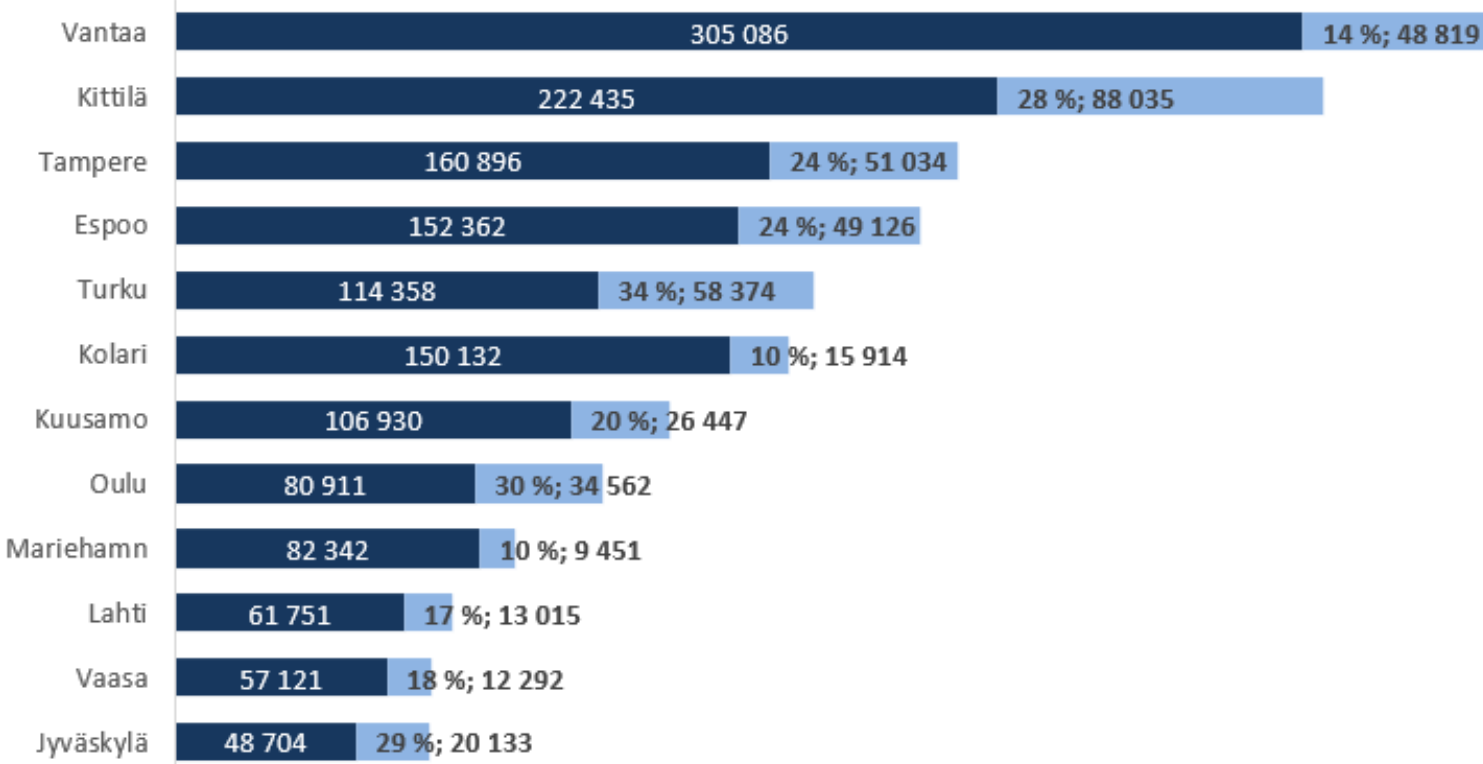
Rovaniemi, foreign overnights in 2022

Registered overnights Short-term rentals overnights



Foreign overnights in some other Finnish municipalities - Year 2022

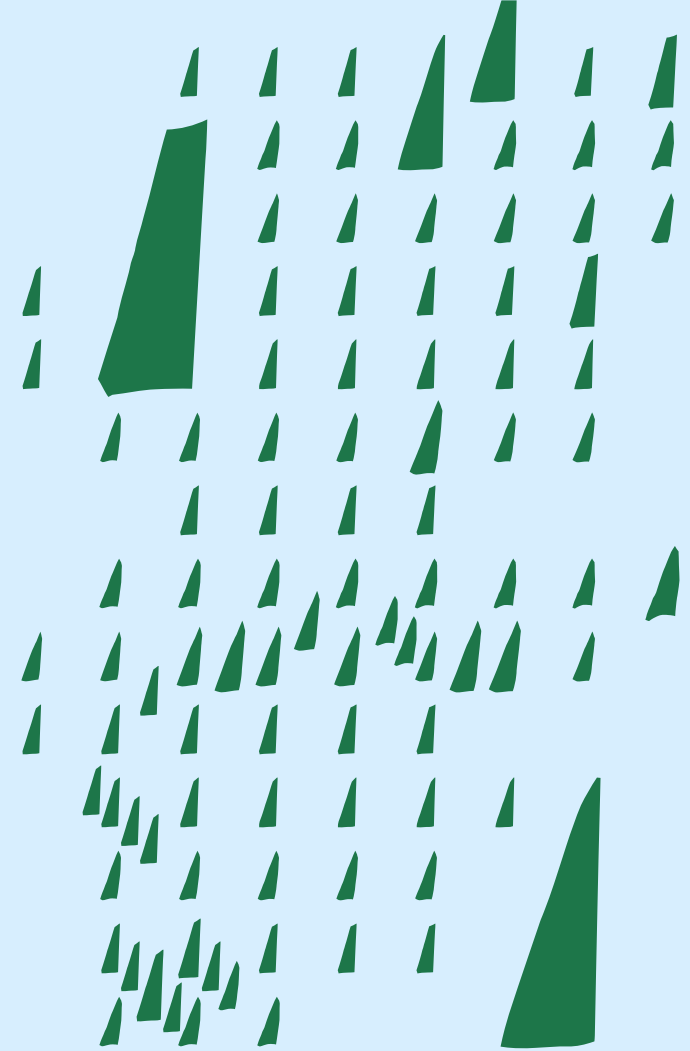
Registered overnights Short-term rentals overnights



Registered overnights in the Nordics

Year 2023

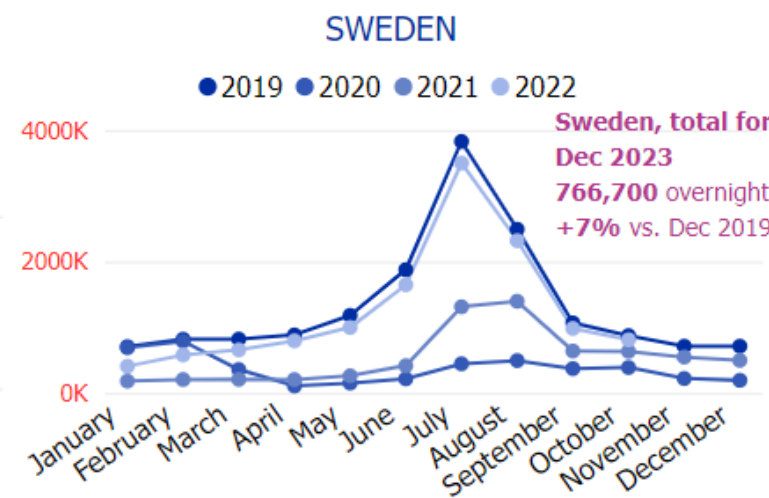
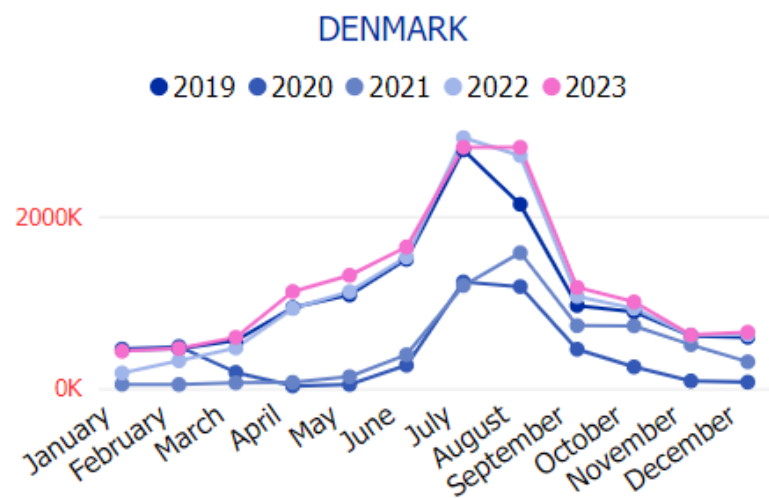
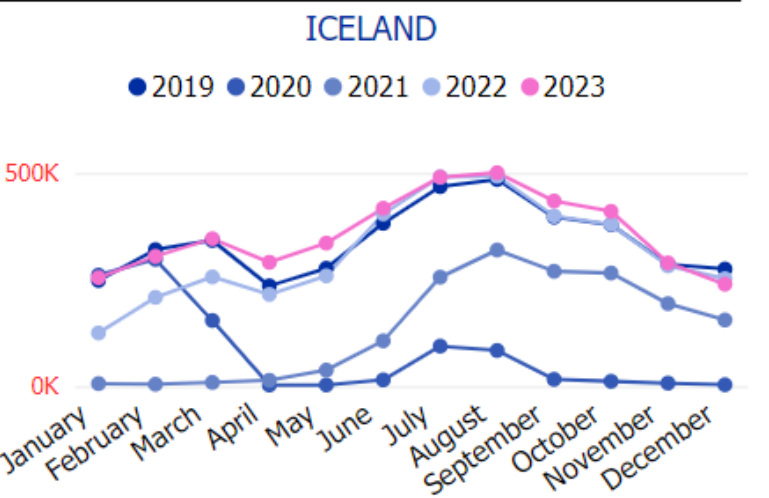
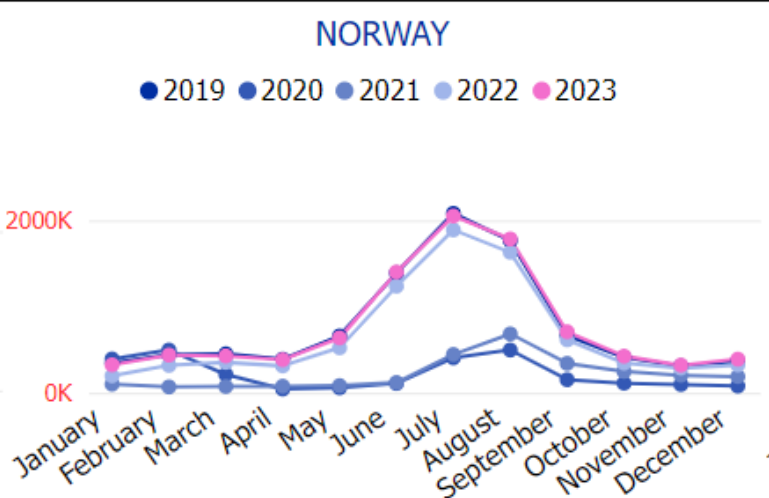
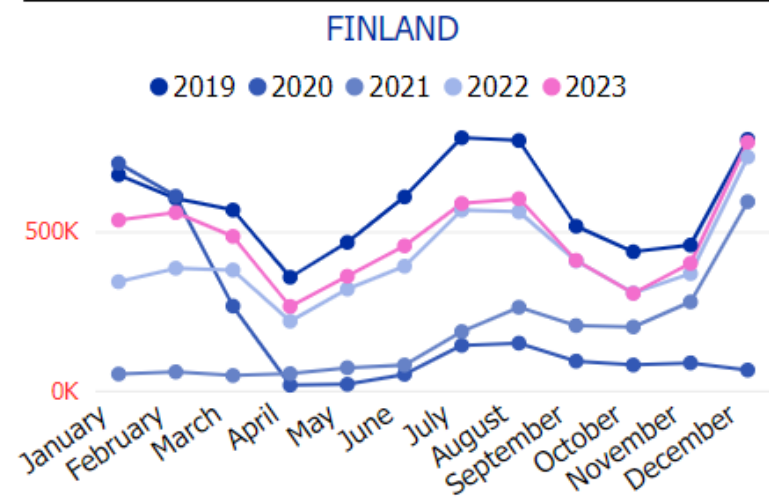
- Travel to Denmark, Iceland, and Norway has totally recovered.
 - Sweden is still slightly below the 2019 overnight figures.
 - Compared to the other Nordic countries, **Finland's recovery has been clearly slower** due to the big impact Russian and the Asian travellers had on travel to Finland pre-pandemic.
- Finland's and Sweden's market shares of international travel have decreased, while Denmark and Iceland have both gained more market share.



NORDIC COMPARISON OF OVERNIGHTS BY A TARGET MARKET

Nationality: Foreign
 Year: 2023
 Month: December

VISIT FINLAND



The latest available figures in report format for Sweden are until Oct-2022.

Total foreign cumulative overnights			
	Year 2019	Year 2023	Change 2023 vs. 2019
Sweden	16 013 200	15 547 200	-3 %
Denmark	12 976 700	14 645 100	13 %
Norway	9 289 500	9 294 500	0 %
Finland	7 056 000	5 742 000	-19 %
Iceland	4 094 300	4 313 600	5 %

Monthly overnight statistics for Iceland include hotels only.

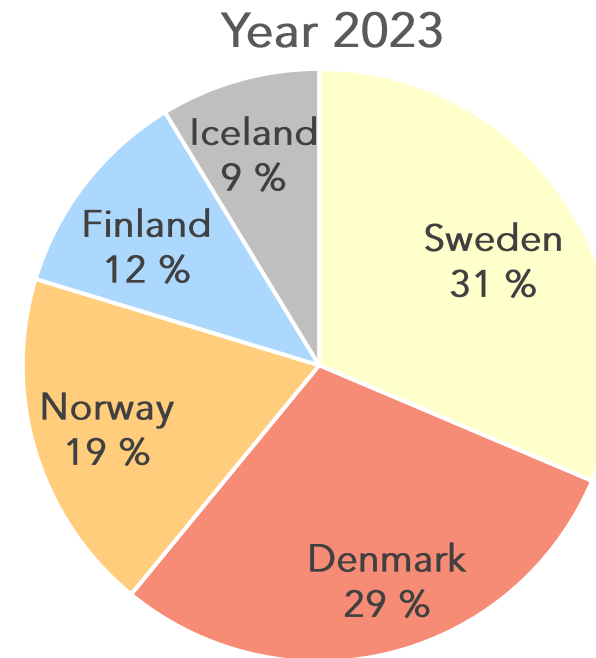
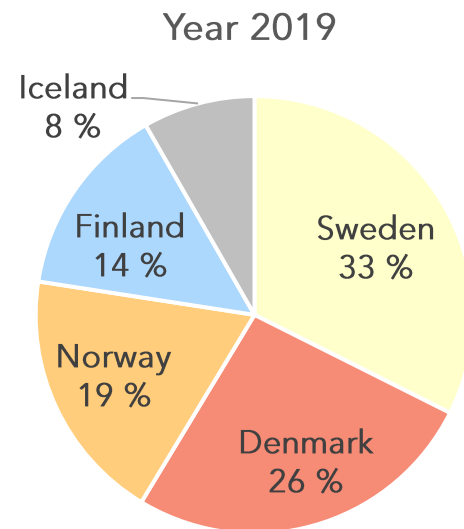
Sources: Rudolf Data Base, Statistics Denmark, Statistics Finland, Statistics Iceland, Statistics Norway, Statistics Sweden

Finland's market share has decreased on travel to the Nordics

Registered overnights	Year 2019	Year 2023	Change 2023 vs. 2019
Sweden	16,0M	15,5M	-3 %
Denmark	13,0M	14,6M	13 %
Norway	9,3M	9,3M	0 %
Finland	7,1M	5,7M	-19 %
Iceland	4,1M	4,3M	5 %
Nordics, total	49,4M	49,5M	0 %

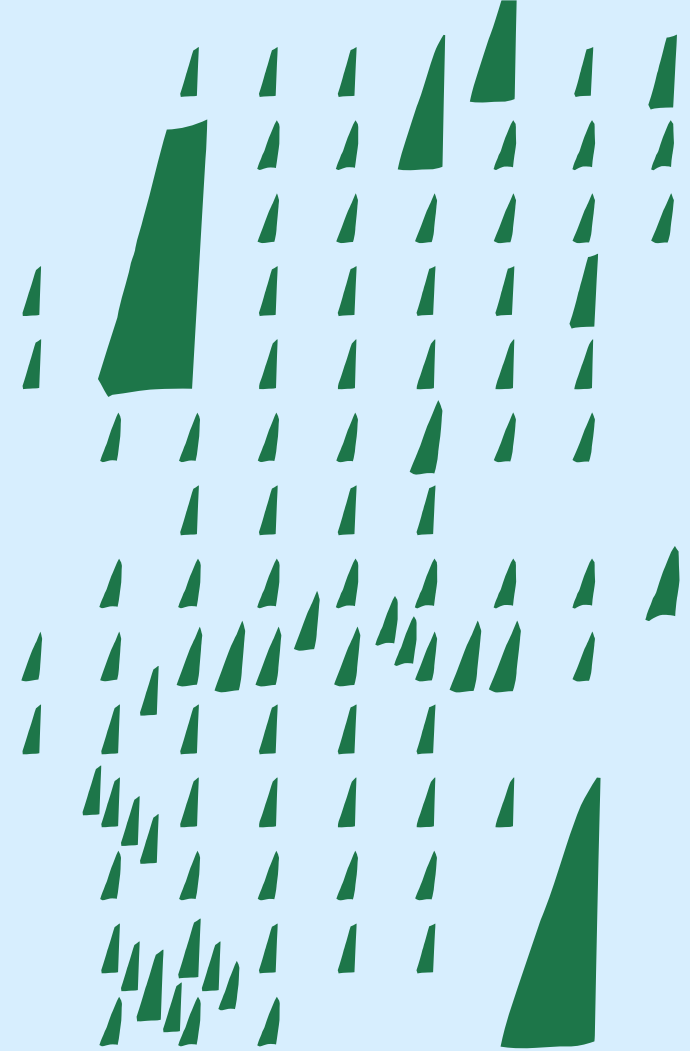
Compared to the other Nordic countries, **Finland's recovery** has been **clearly slower** due to the big impact Russian and the Asian travellers had on travel to Finland pre-pandemic.

Denmark and Iceland have increased their market share of the intn'l travel to the Nordics, while the share of Finland and Sweden has decreased.



Flight bookings for March-May 2024

- Airline bookings for the **spring months** of March - May show a **good increase compared to 2023**. *When comparing to pre-pandemic, the total int'l bookings are **at the same level**. However, several of the **main source markets** show **positive development** even compared to 2019.*
- Total int'l bookings to **Norway** and **Sweden** for the spring months are growing even stronger than to Finland. Especially Norway continues with very good growth both compared to 2023 and to 2019.



Int'l bookings for March – May 2024

85,800

+18% (0%)

Bookings to Finland, foreign
for Mar-May 2024
change vs. **2023** & (2019)

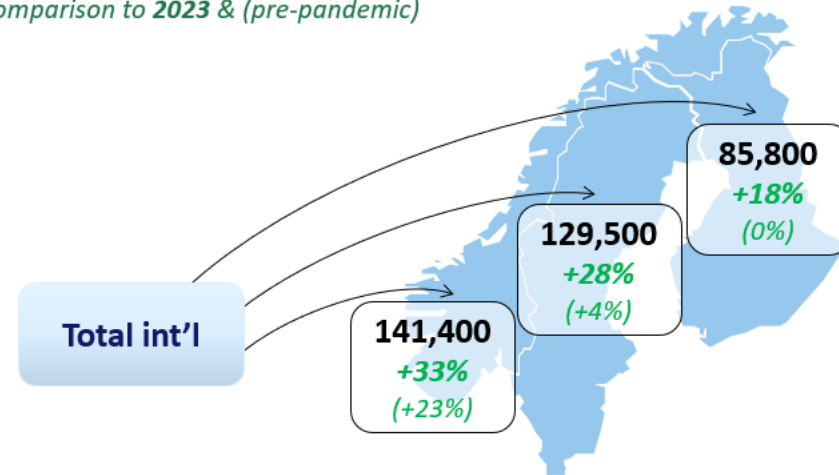
55,100

+15% (+15%)

Bookings to Finland,
selected markets* & USA
for Mar-May 2024
& change vs. **2023** & (2019)

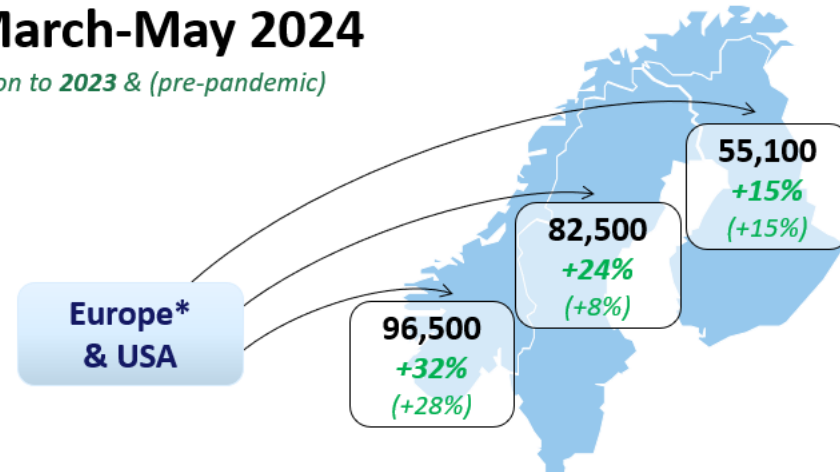
Total int'l flight bookings for March-May 2024

Comparison to 2023 & (pre-pandemic)



Flight bookings from Europe* & USA for March-May 2024

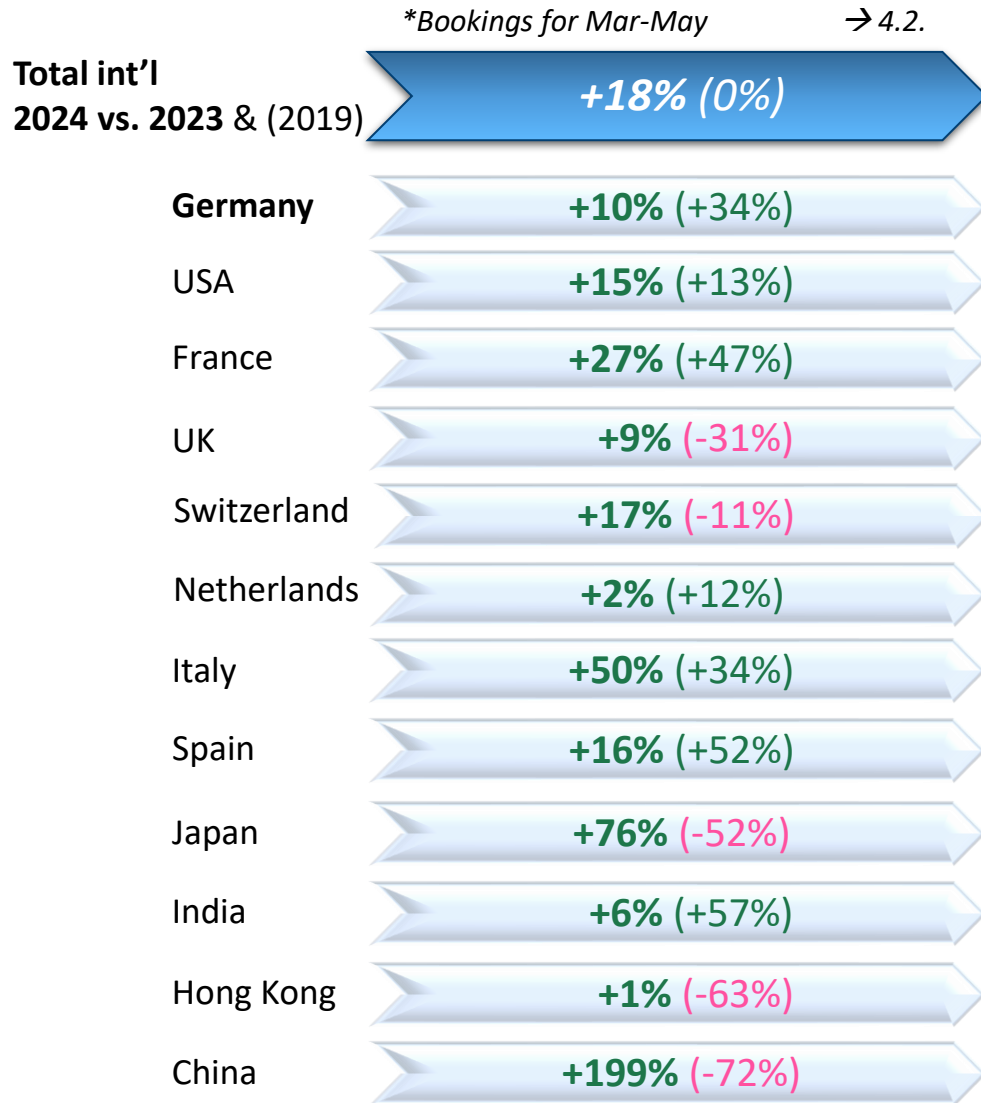
Comparison to 2023 & (pre-pandemic)



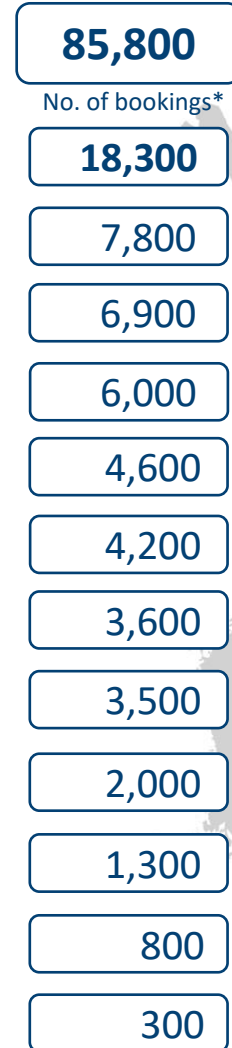
- *) Including:
- Germany
 - UK
 - France
 - Netherlands
 - Switzerland
 - Spain
 - Italy

Follow up on flight bookings* to Finland for March-May 2024

compared to 2023 & (pre-pandemic)



March-May



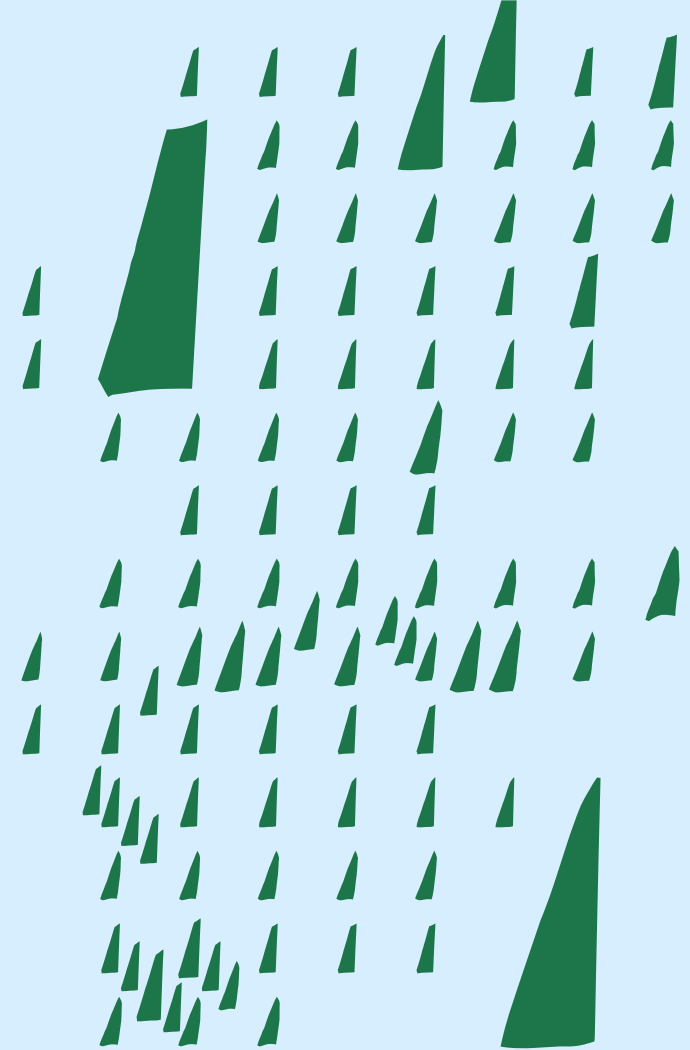
Please note! **Ryanair** and **EasyJet** bookings as well as **charter flights** are not included in the booking data.

This has a big impact especially on bookings from the **UK, BENELUX** and **Italy** when comparing to 2019.

Seat capacity on int'l flights

March – May 2024

- **Seat capacity** for the **spring months** of March – May is **12% above 2023 level**, *but still -18% compared to the pre-pandemic level.*
- Seat capacity from **Europe** and **Asia** is **improving** compared to **previous year**.
 - Seat capacity from **nearly each source market in Europe** are developing positively compared to 2023.
 - From the Asian source markets, seat capacity is growing from **Japan**, **Thailand**, and **China**.
- Seat capacity from **USA** is slightly below the 2023 level during the spring months, but still clearly above the pre-pandemic level.



Direct int'l flights to Finland March – May 2024

and change in seat capacity compared to pre-pandemic

USA

19 avg. weekly flights
(Share; %YoY & %YoYPP)
(3%; -6% & +12%)

From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	4-6
Chicago (ORD)**	HEL	5
Los Angeles (LAX)	HEL	3
Miami (MIA)*	HEL	3

*) winter season, ending end-Mar
**) summer season, starting end-Mar

Asia

76 avg. weekly flights
(Share; %YoY & %YoYPP)
(11%; +5% & -41%)

From	To	Average weekly frequency
Tokyo (HND)	HEL	10-12
Bangkok (BKK)	HEL	14 → 7
Doha (DOH)	HEL	7
Seoul (ICN)	HEL	7
Singapore (SIN)	HEL	7
Delhi (DEL)	HEL	6-7
Hong Kong (HKG)	HEL	6-7
Tokyo (NRT)	HEL	4 → 6
Osaka (KIX)	HEL	3 → 5
Shanghai (PVG)	HEL	5-7
Zhengzhou (CGO)	HEL	1
Phuket (HKT)*	HEL	4-6
Dubai (DXB)*	HEL	3

*) winter season only
In addition, Nagoya starting end May

Europe

1,163 avg. weekly flights
(Share; %YoY & %YoYPP)
(86%; +13% & -14%)

**Total seat capacity to Finland
for March – May 2024**

2.6 M

+12% vs. 2023 & -18% vs. 2019

