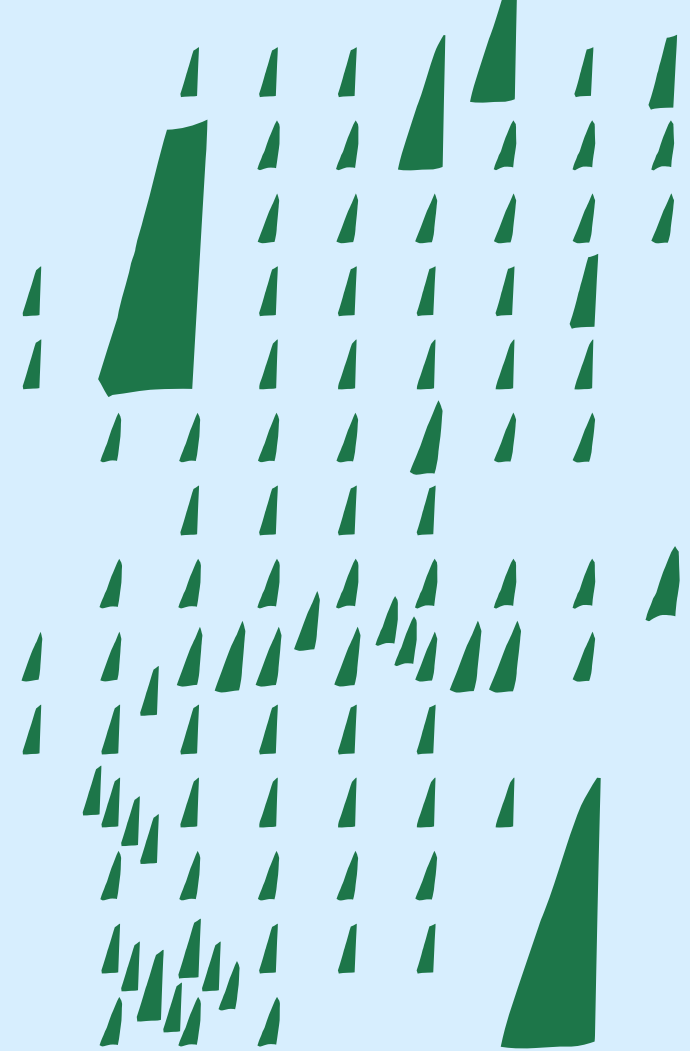


# German overnights in Finland



# Overnights in Finland in 2022 & top source markets

Year 2022 vs. year 2019

## Overnights in 2022

**Total foreign 5.0 M**

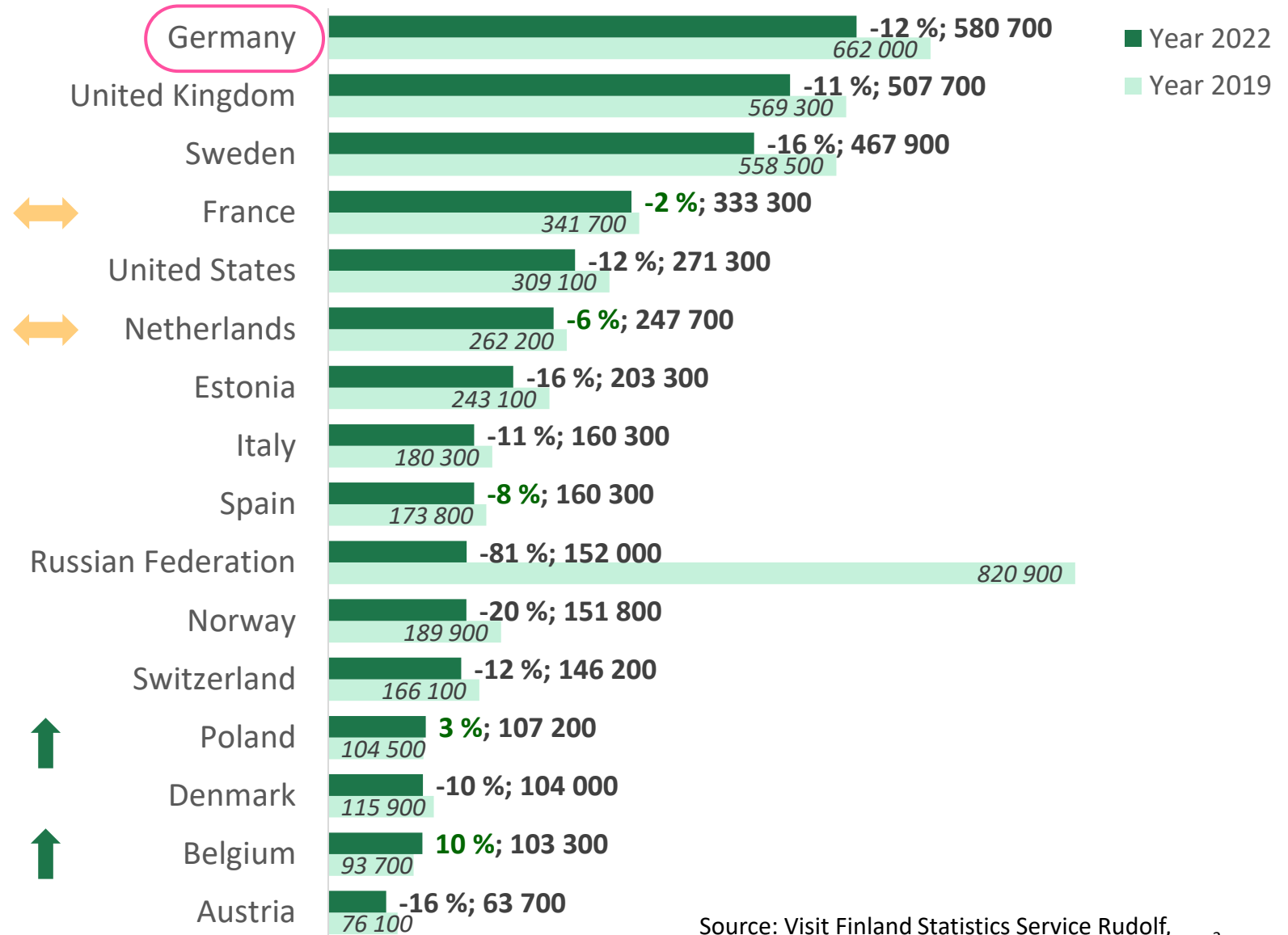
(-29% vs. 2019)

**Foreign excl. Russia 4.8 M**

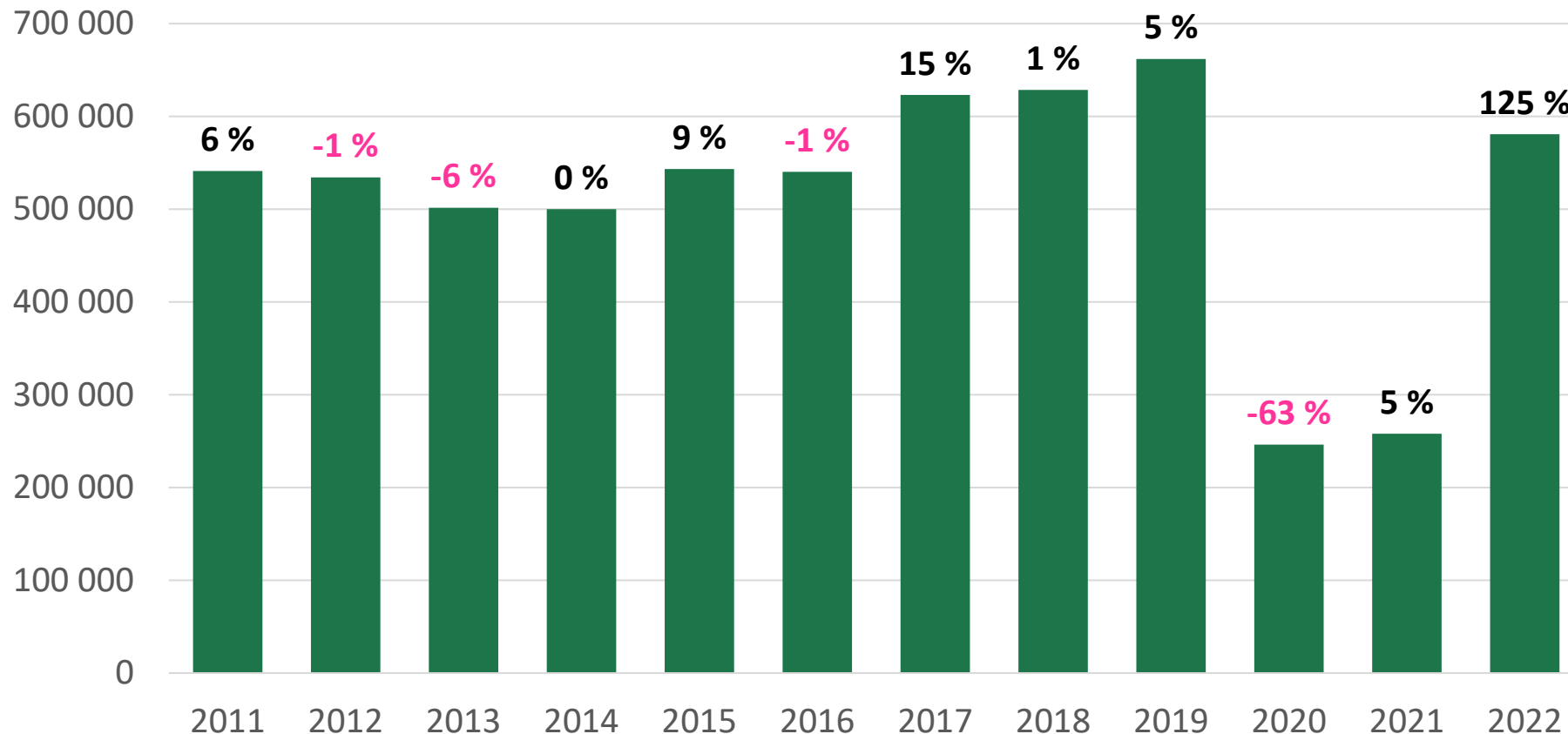
(-23% vs. 2019)

**EU+UK 3.4 M**

(-9% vs. 2019)



# German overnights in Finland 2011-2022

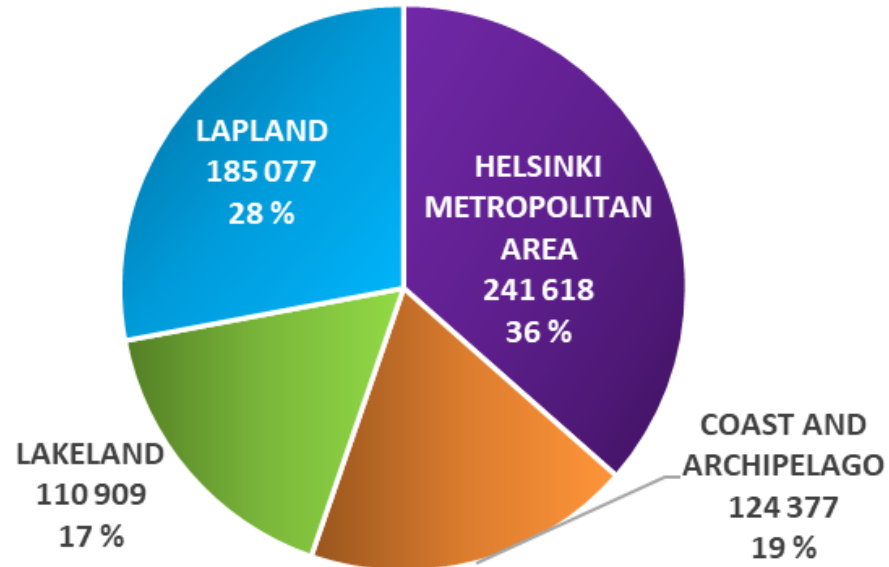


2022  
**580,700** nights  
#1 in market ranking  
YoY change +125%  
2022 vs. 2019 -12%

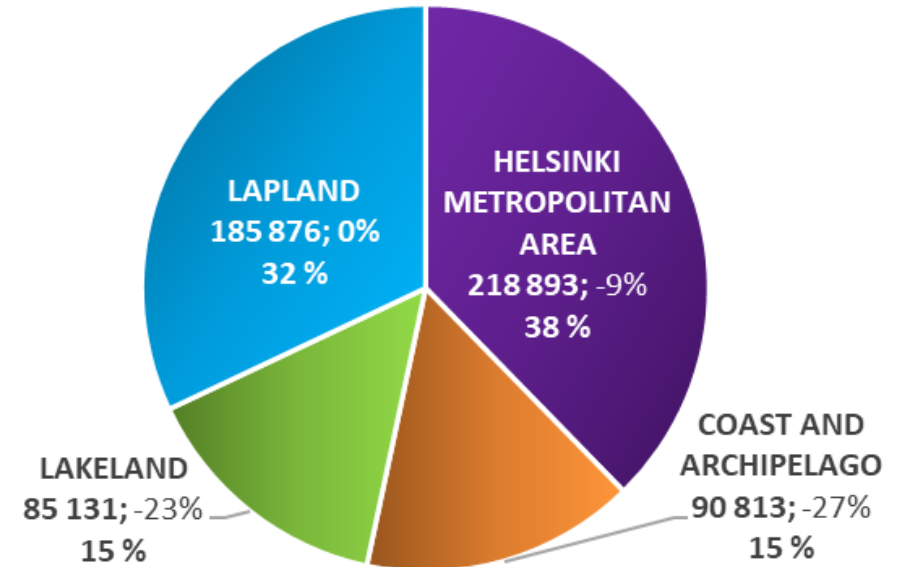
2019  
**662,000** nights  
#2 in market ranking

# German overnights in Main Regions 2019 & 2022

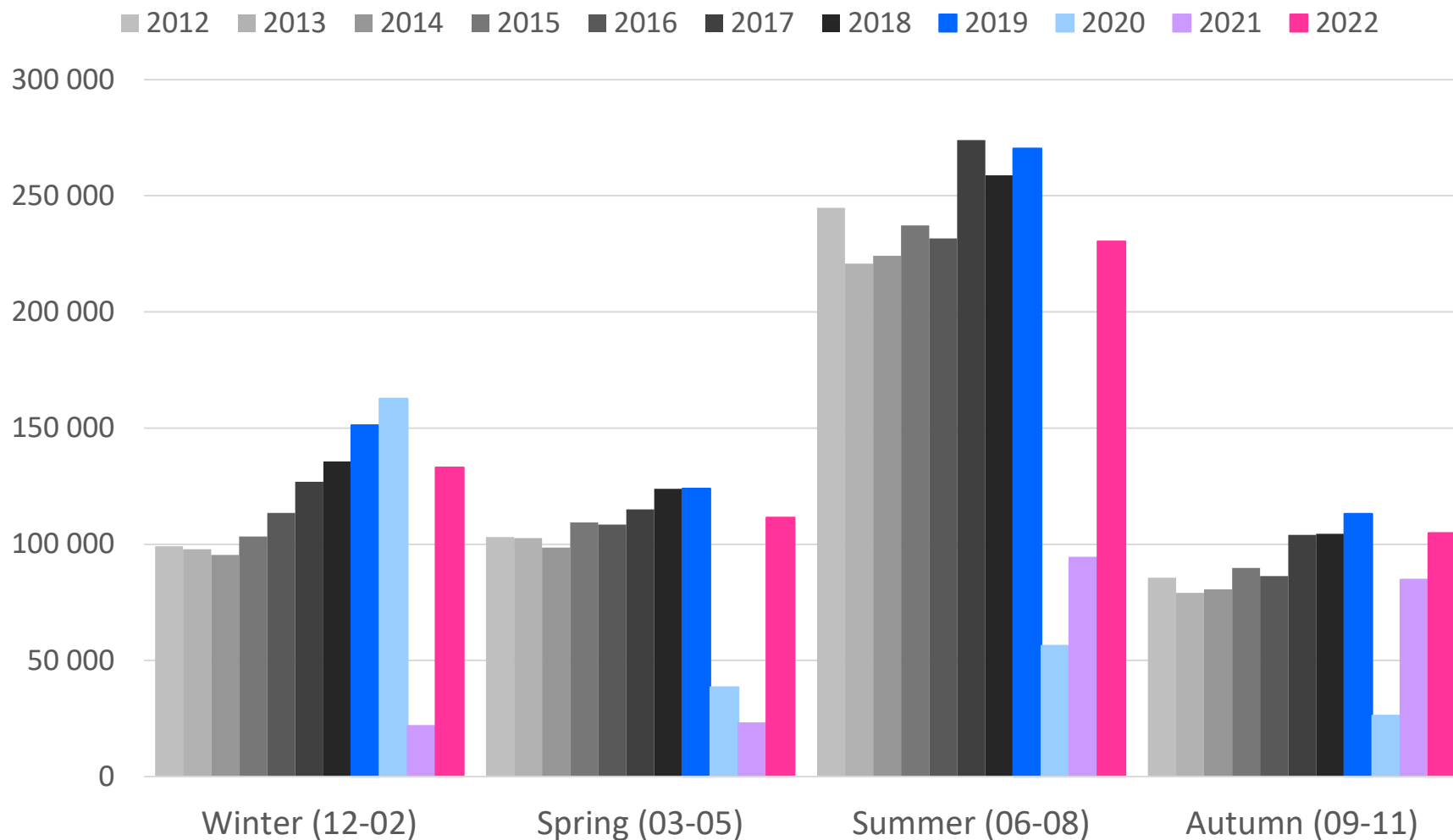
German overnights in main marketing areas  
Year 2019



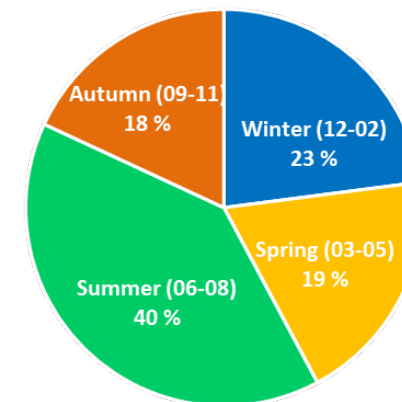
German overnights in main marketing areas  
Year 2022 & change-% vs. 2019



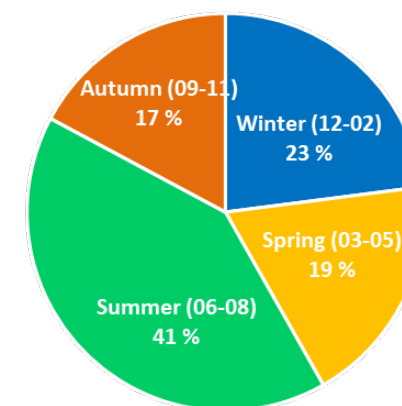
# Germany – Seasonal Overnights in Finland 2012-2022



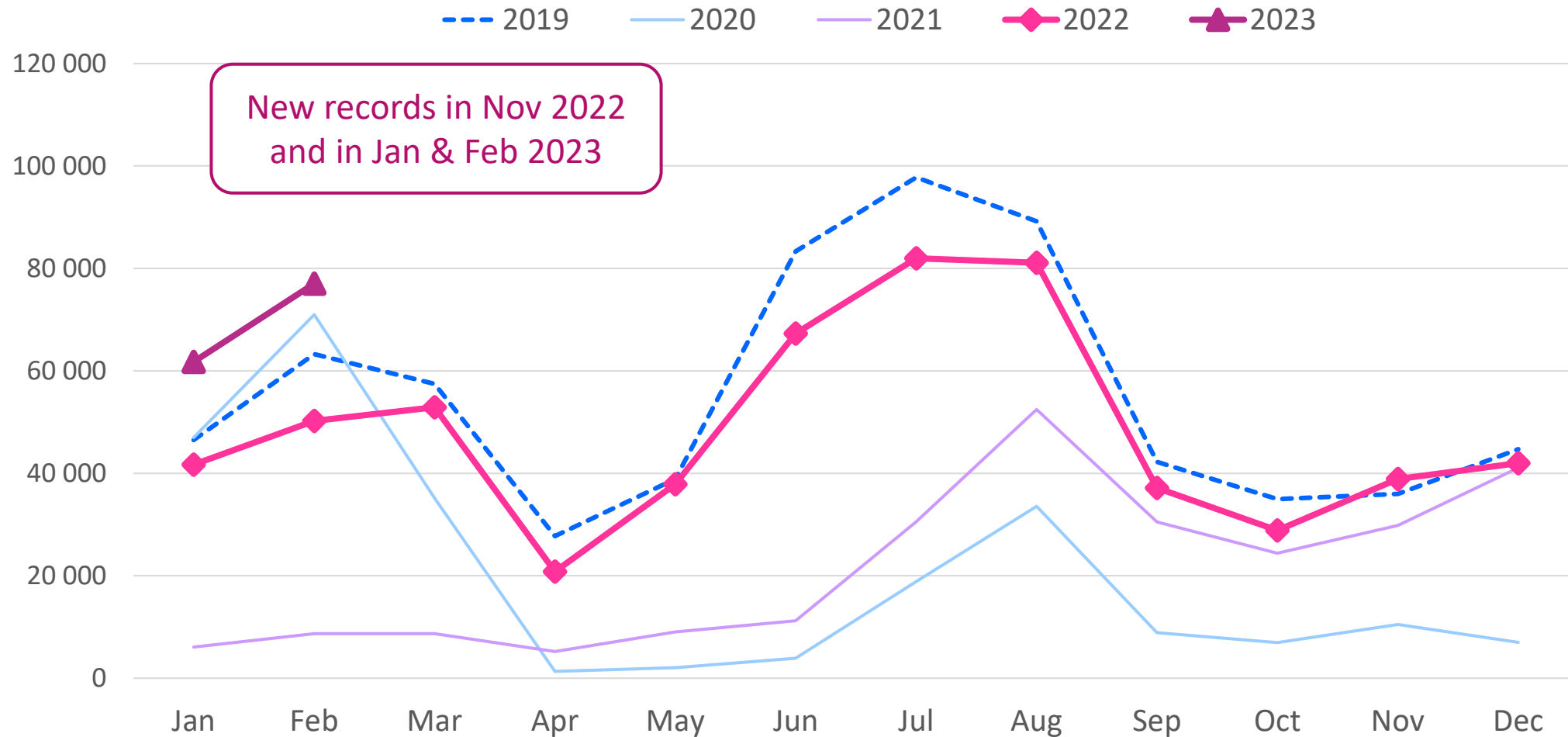
German overnights in 2022



German overnights in 2019



# German monthly overnights in Finland 2019-2023

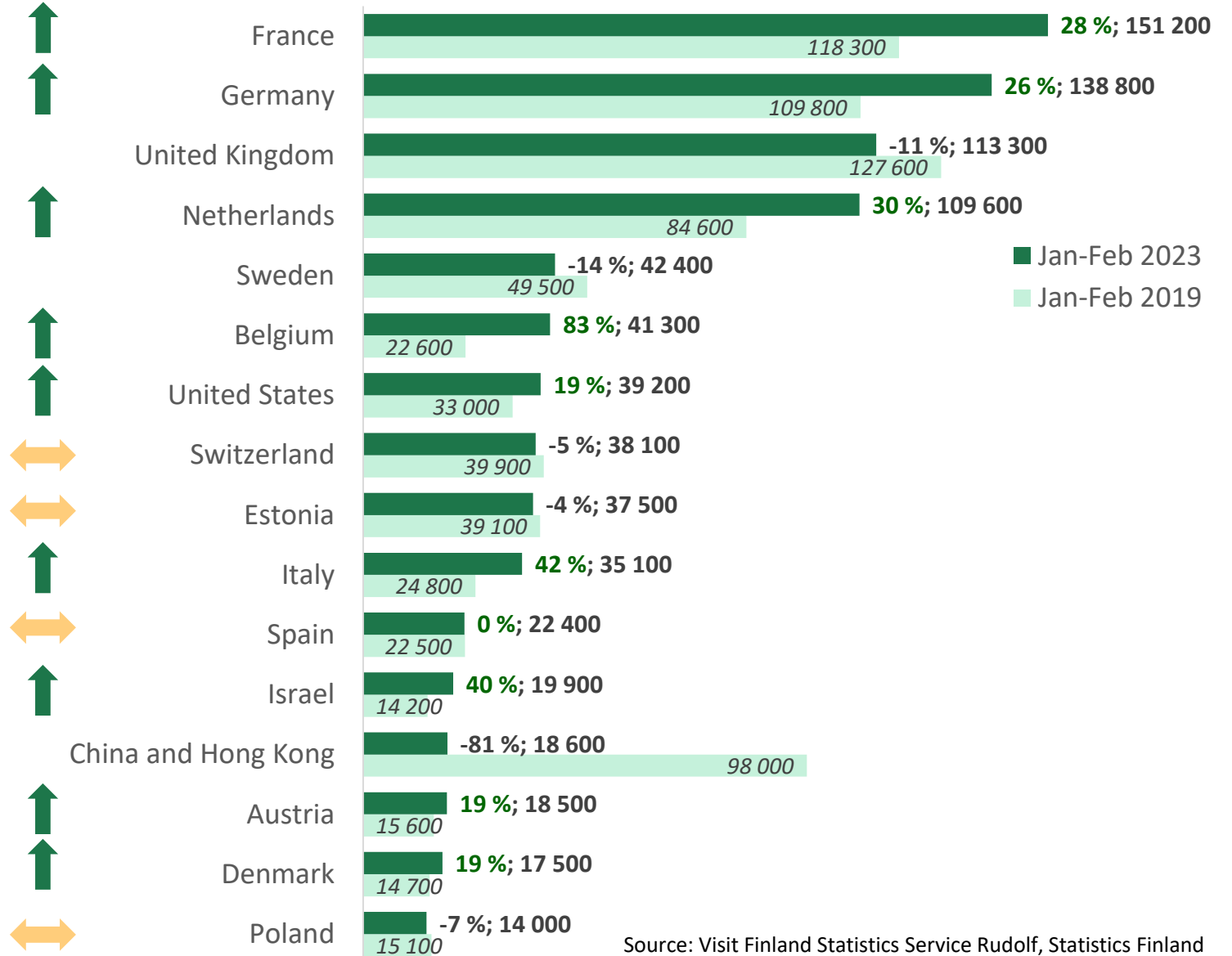


# Top16 countries 2023 – overnights in Finland

Jan-Feb 2023 vs. Jan-Feb 2019

## Top5 origin countries for Feb2023 overnights

	Overnights	Change to Feb2019
France	79 800	<b>+28%</b>
Germany	77 000	<b>+22%</b>
Netherlands	54 300	<b>+19%</b>
UK	53 100	-15%
Belgium	22 800	<b>+81%</b>



# Foreign overnights in high winter season 2022-2023

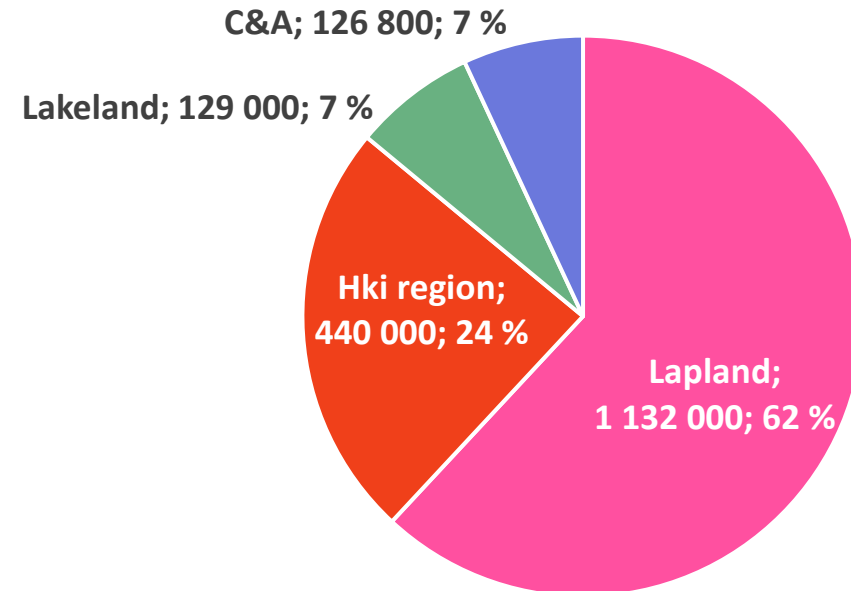
And change compared to pre-pandemic

## High winter season (12-02)

	Dec2018- Feb2019	Dec2022- Feb2023	Change 2023 vs. 2019
United Kingdom	334 900	341 100	+2%
France	161 700	209 900	+30%
Germany	151 300	180 700	+19%
Netherlands	106 700	131 200	+23%
USA	53 800	64 700	+20%
Sweden	75 100	63 600	-15%
Spain	59 400	63 100	+6%
Italy	42 900	59 900	+40%
Estonia	58 200	59 600	+2%
Belgium	30 300	51 100	+69%
Switzerland	51 800	48 600	-6%
China & Hong Kong	139 700	33 200	-76%
Singapore	35 300	31 400	-11%
Ireland	14 900	28 600	+92%
Australia	32 600	26 000	-20%
Denmark	21 200	24 300	+14%

**1.8 M** foreign overnights  
(-12% vs. winter2019)

- **1.3 M** from EU-27 + UK (+15%)
- **186,000** from Asia (-46%)
- **88,000** from America (+21%)





# Winter high season 2023: Foreign overnights in main regions

And comparison with winter high season 2019

## Lapland region

**1,132,000** overnights  
+8% vs. winter2019

Share of all foreign **62%**

Main dest: **Rovaniemi, Inari-Saariselkä, Levi, Ylläs**

Top5 countries of origin		
UK	298,700	+8%
France	179,600	+38%
Germany	111,100	+44%
Netherlands	103,800	+35%
Spain	41,900	+5%

## Helsinki region

**440,000** overnights  
-26% vs. winter2019

Share of all foreign **24%**

Main dest: **Helsinki**

Top5 countries of origin		
Germany	38,100	-5%
USA	35,900	+12%
UK	33,700	-23%
Sweden	30,800	-15%
France	19,200	+8%

## Lakeland

**129,000** overnights  
-53% vs. winter2019

Share of all foreign **7%**

Main dest: **Tampere, Lahti, Jämsä, Sotkamo, Jyväskylä**

Top5 countries of origin		
Estonia	22,200	+4%
Germany	14,000	-16%
Netherlands	6,600	-22%
Sweden	6,400	-41%
UK	5,200	-29%

## Coast & archipelago

**126,800** overnights  
-19% vs. winter2019

Share of all foreign **7%**

Main dest: **Oulu, Syöte, Turku, Åland, Vaasa**

Top5 countries of origin		
Sweden	19,700	-10%
Germany	17,600	0%
Estonia	9,500	-18%
Netherlands	7,600	+19%
France	6,000	+14%

# Record high number of German overnights in Lapland region during high winter season 2022-2023

**Dec 2022 – Feb 2023**

**111,100** German overnights  
in the Lapland region

**+44%** vs. winter 2019  
&  
**+29%** vs. winter 2020

## Most popular destinations for German visitors in Lapland during winter 2023

Rovaniemi	22,800
Muonio	20,400
Inari-Saariselkä	17,900
Kuusamo	14,100
Kittilä-Levi	12,400
Kolari-Ylläs	9,200

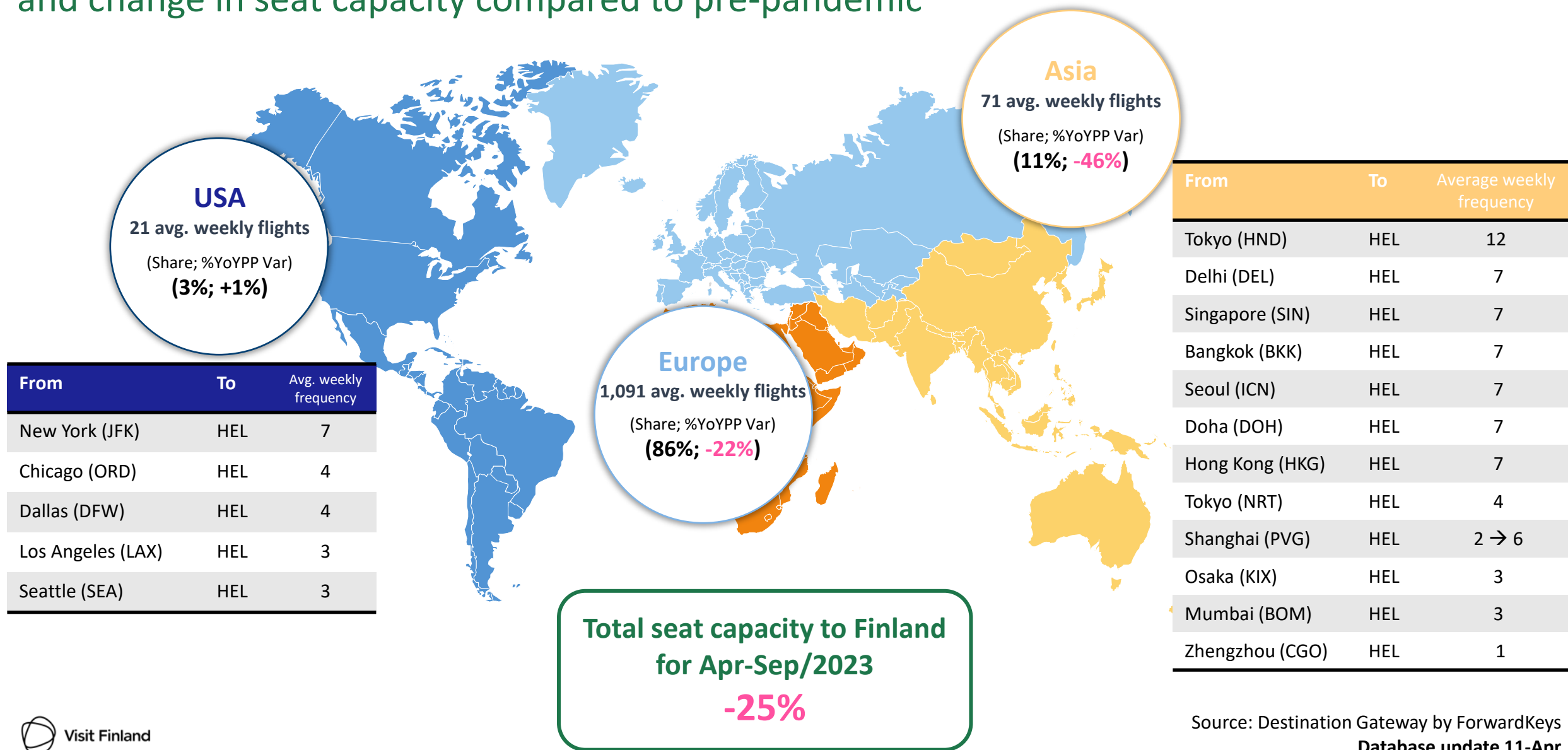


ForwardKeys

# **Seat capacity & Flight arrivals/bookings**

# Direct flights to Finland April – September 2023

and change in seat capacity compared to pre-pandemic



# Direct flights to FIN, SWE, NOR / April – September 2023

and change in seat capacity compared to pre-pandemic

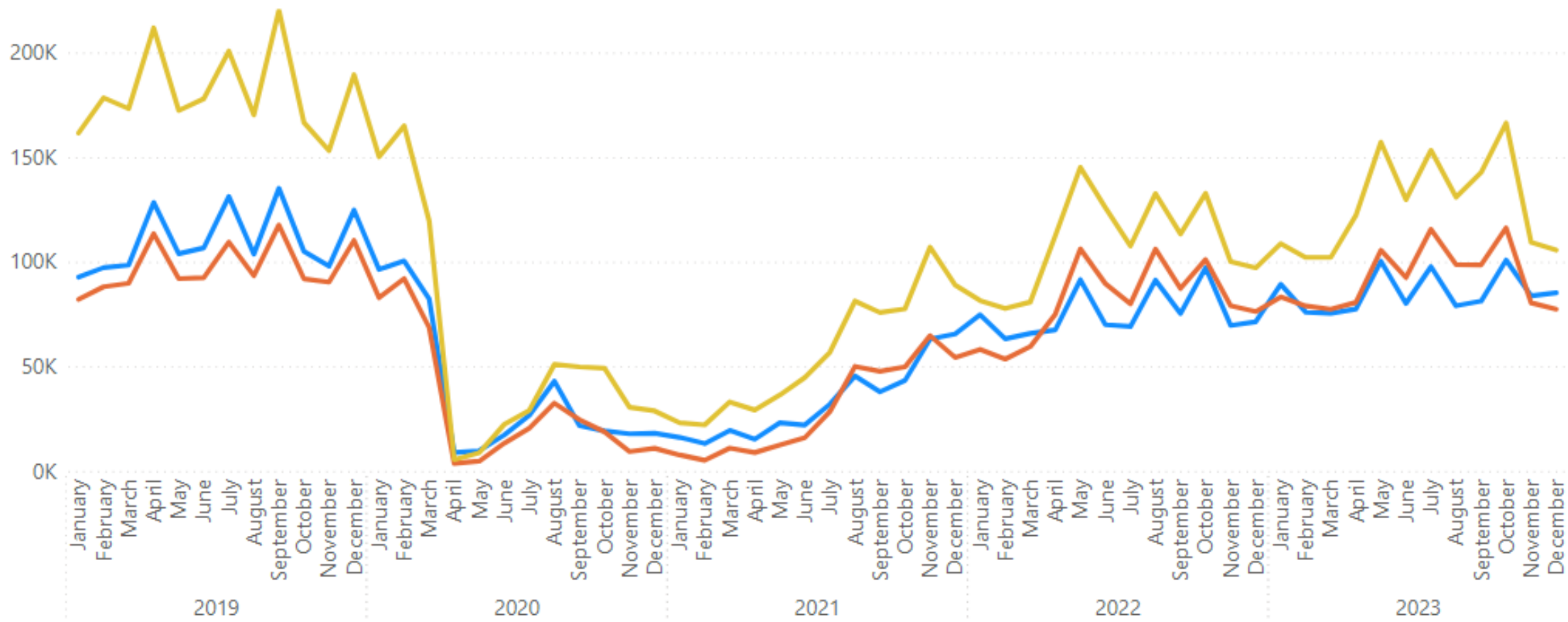
	Seat capacity from USA	change-% vs. pre-pandemic from USA	Seat capacity from Asia	change-% vs. pre-pandemic from Asia	Seat capacity from Europe	change-% vs. pre-pandemic from Europe	Seat capacity TOTAL INT'L	change-% vs. pre-pandemic TOTAL INT'L
Finland	153,700	+1%	538,000	-46%	4,219,200	-22%	4,911,500	-25%
Sweden	155,500	-38%	260,800	-41%	8,271,600	-14%	8,764,000	-15%
Norway	107,900	-25%	123,300	-40%	7,529,200	-6%	7,760,500	-8%

# Monthly seat capacity from Germany to FIN, SWE, NOR 2019-2023

TOTAL SEAT CAPACITY

From Germany

DESTINATION COUNTRY: ● FI ● NO ● SE



# Seat capacity from Germany to Finland / Apr-Sep 2023

Comparison to pre-pandemic

Seat capacity from Germany to **Finland** will be **23% below** the pre-pandemic during spring-summer 2023

✈️ Germany (excl. domestic) → Finland **Pre-pandemic analysis**

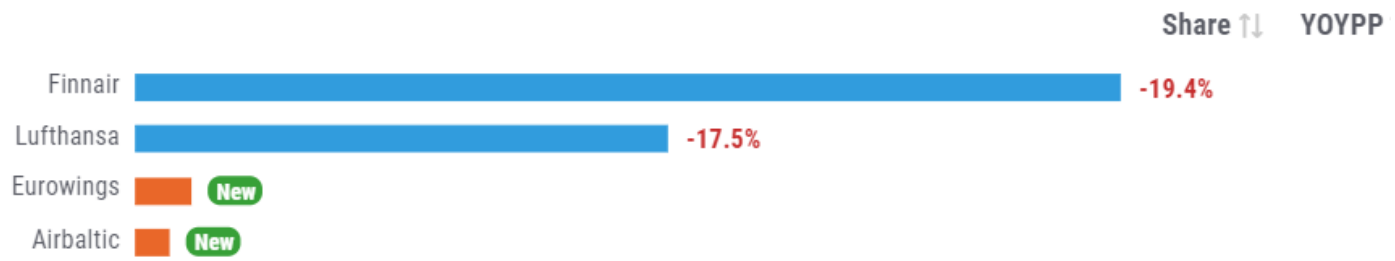
Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

5 airports **-23.2%** YOYPP for selected locations



**-23.2%** YOYPP for selected airlines



# Seat capacity from Germany to Sweden / Apr-Sep 2023

Comparison to pre-pandemic

Seat capacity from Germany to Sweden will be **25% below** the pre-pandemic during spring-summer 2023

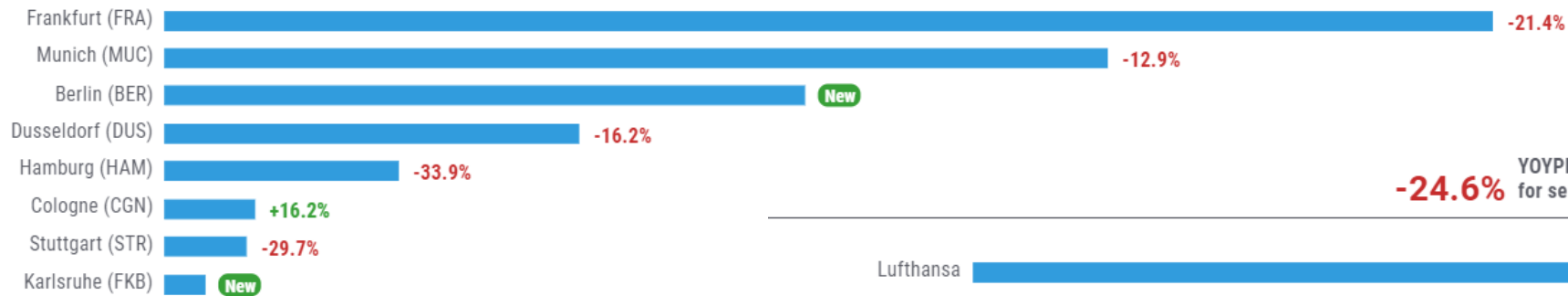
Germany (excl. domestic) → Sweden **Pre-pandemic analysis** Date

Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

8 airports **-24.6%** YOYPP for selected locations

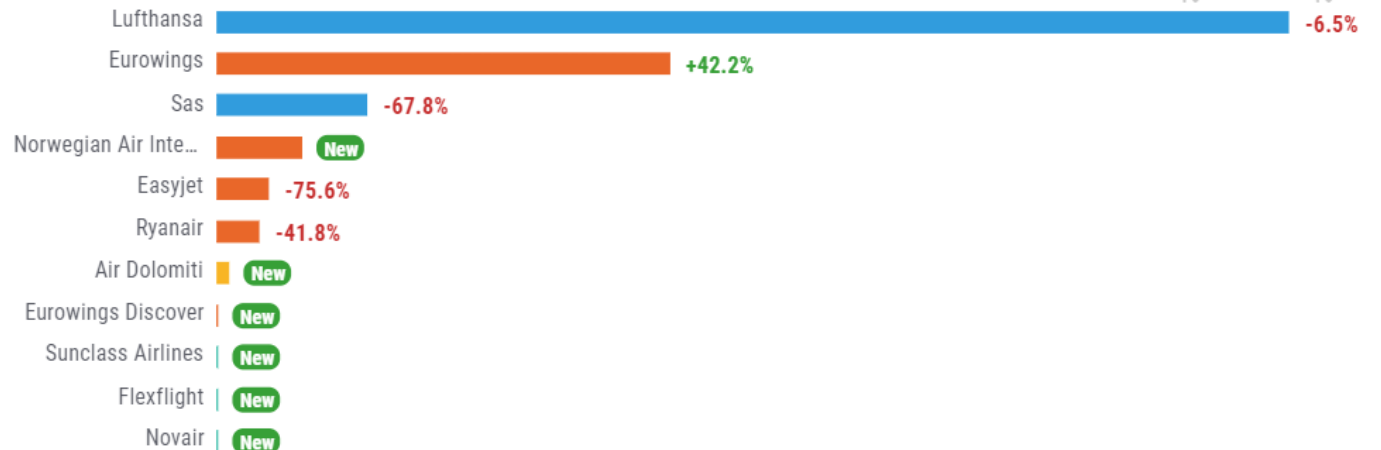
Share ↑↓



**-24.6%** YOYPP for selected airlines

Share ↑↓

YOYPP ↑↓





# Seat capacity from Germany to Norway / Apr-Sep 2023

Comparison to pre-pandemic

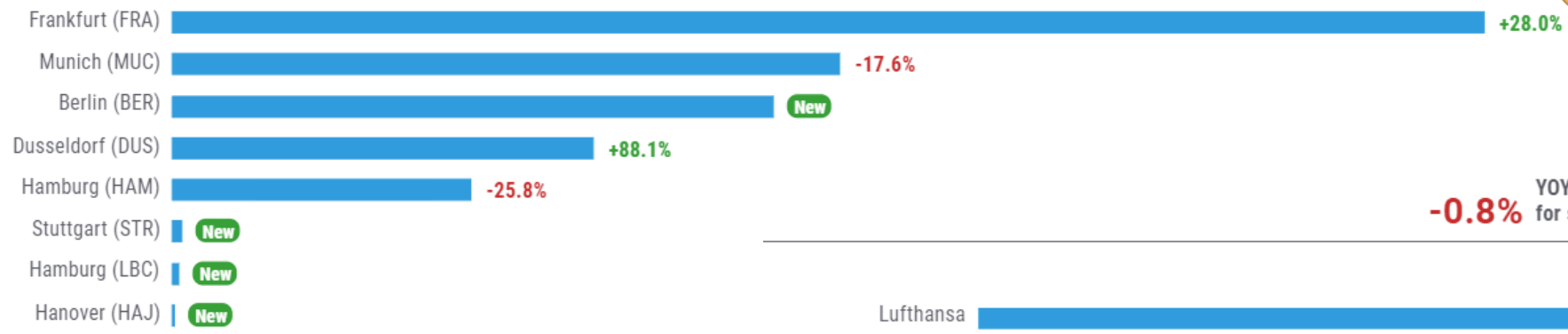
Seat capacity from Germany to Norway will be **only 1% below** the pre-pandemic during spring-summer 2023

✈️ Germany (excl. domestic) → Norway **Pre-pandemic analysis**

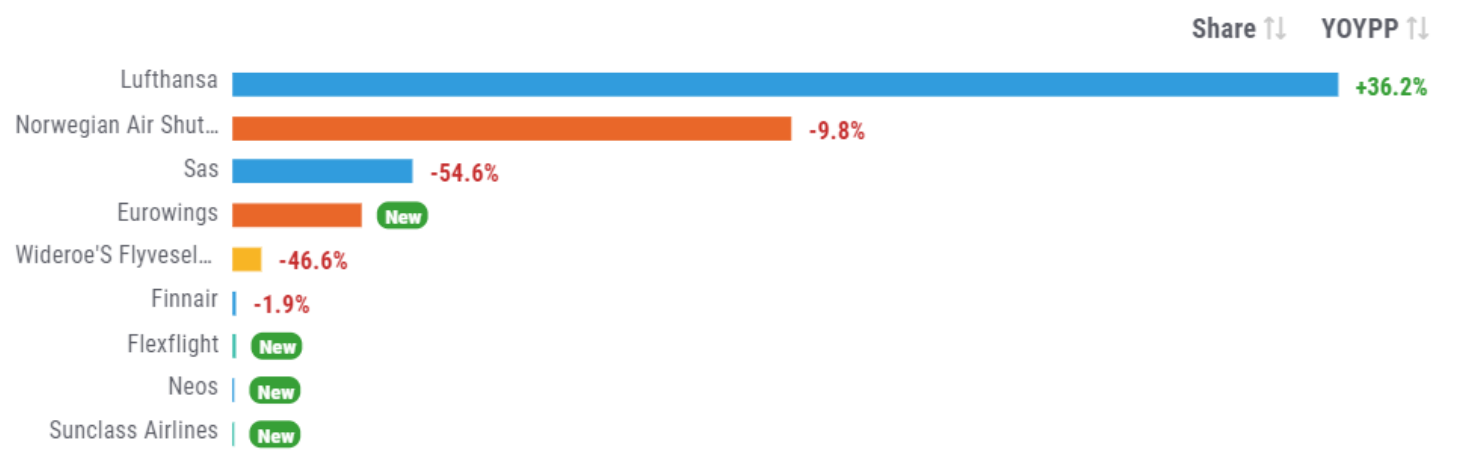
Filtered period | 01 Apr 2023 - 30 Sep 2023 compared to 01 Apr 2019 - 30 Sep 2019

Flight origins

8 airports **-0.8%** YOYPP for selected locations



**-0.8%** YOYPP for selected airlines



# Change in flight bookings\* for Jun-Aug 2023 compared to summer pre-pandemic

\*change in flight bookings for  
Jun-Aug → data update 12.3.

→ 2.4.

**Total int'l**  
summer 2023 vs. 2019



**June-August**

**101,000**

No. of flight tickets\*

**15,600**

**10,200**

**8,900**

**6,900**

**6,100**

**4,600**

**4,500**

**3,300**

**3,200**

**2,900**

**1,500**

**Germany**



**USA**



**UK**



**Switzerland**



**France**



**Hong Kong**



**Netherlands**



**Italy**



**Spain**



**Sweden**



**Japan**



Please note! Ryanair, EasyJet and most of the charter flight bookings are not included in the booking data and this needs to be taken into account when comparing the markets.

# Change in flight arrivals/booking from Germany

## Comparison to pre-pandemic

- Travel from Germany seems to be recovering faster to Finland and Norway than to Sweden.
- Finland experienced very strong recovery during last winter, and there is a clear peak in bookings for May (Ice hockey world championships in Finland). July and August outlook is also quite positive for Finland.

Data updated 02-Apr

### Destination benchmark

YOYPP of tourist arrivals

### Germany - Change in arrivals / bookings vs. pre-pandemic



Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.  
Most of the charter flights also missing.

# Flight bookings for summer 2023 (Jun-Aug)

Comparison with pre-pandemic



## Germany - Bookings for Jun-Aug 2023

	June	July	August	Jun-Aug
<b>Finland</b>	5,800	6,200	3,600	<b>15,600</b>
<b>Sweden</b>	10,400	8,400	6,500	<b>25,300</b>
<b>Norway</b>	8,000	6,400	5,800	<b>19,500</b>
	June	July	August	Jun-Aug
<b>Finland</b>	-23%	-2%	+4%	-10%
<b>Sweden</b>	-28%	-15%	-13%	-20%
<b>Norway</b>	-5%	+1%	-12%	-5%

Including at least 1 night in destination.

Biggest low-cost carriers like Ryanair and Easyjet not included in the data.

