



Visit Finland

VF monthly follow up

December & year 2024



Summary

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

Border survey 2024

- Foreign visitors made **4.9 million trips** to Finland during 2024, and they **spent 3.7 billion euros in Finland**. **Median length of stay was 4 nights** and **74%** of the visitors were travelling for **leisure purposes**.
 - **Estonia, Sweden, Germany, UK, USA, France, Spain, and Italy** were the biggest source markets by the number of **trips made to Finland**.
 - **Germany, Estonia, USA, UK, and France** were the biggest contributors in **total spending in Finland**. Visitors travelling to Finland for **participating to a conference, congress or fair** and **holiday makers** had the **biggest spend per day**.
 - Visitors from **Estonia** and **Austria** had the best **carbon efficiency** rate (€/CO₂).
 - Most popular destination was **Helsinki region in Uusimaa county**. **Lapland** was **equally popular** with Uusimaa during **December**. Lapland's share of visitors decreased from winter months and was clearly smaller during the summer months but started to increase from September onwards.
- Nearly half of the visitors came to Finland for **vacation/recreation**, and they also contributed **half of the total spend amount**.
 - Vacation travellers came from **89 source markets**, and biggest were **Germany, Estonia, UK, USA, Sweden, France, Italy, and Spain**.
 - Among vacation travellers, **biggest spenders per day** came from **Singapore, Australia, China, Japan, Ireland, and UK**.
 - **Dutch, French, Belgian, Korean, and Swiss** holiday makers had the **longest median length of stay**.
 - **Advance bookings** were made the earliest in **Australia, UK, USA, Ireland, Singapore, and the Netherlands**.
 - **Dutch, British, and Singaporeans** booked most actively **package trips** for their vacation in Finland.

Summary

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

Registered foreign overnights in Finland in 2024

- There were **6.4M registered foreign overnights in Finland** last year which amounted to 28% of the total overnights. Foreign overnights **increased by 11%** compared to previous year *but remained 10% below the level of 2019*.
- The biggest source markets were **Germany, UK, Sweden, USA, France, and the Netherlands**.
 - **43%** of the foreign overnights took place in **Helsinki region** and **33%** in **Lapland region**. There was a positive development in overnights in each region except in Lakeland compared to previous year, but *only Lapland region has surpassed the level of year 2019*.
- **December** marked all time highest number of monthly foreign overnights – **903,600** – which was **16% higher than year before** and *15% higher than in December 2019*.
 - Biggest source markets in December were **UK** (27% of total foreign), **France, Germany, Spain, USA, and Singapore**.
 - Main destinations were **Helsinki, Rovaniemi, Inari-Saariselkä, Kittilä-Levi, Ruka-Kuusamo, Kolari-Ylläs, Vantaa, and Sodankylä**.
 - **63%** of the foreign overnights in December were spent in **Lapland region**, and **27%** in **Helsinki region**.
 - Foreign overnights **increased by 9% in Lapland region** compared to year before, and **28% in Helsinki region**. *December overnights were also above the level of 2019 both in Lapland region (+28%) and in Helsinki region (+7%)*.

Registered overnights in the Nordics in 2024

As Iceland is currently undergoing revisions in their statistics, the total number of foreign overnights of 2024 is not available, so an estimate based on year 2023 is used for Iceland.

- Number of foreign overnights **increased clearly in 2024** in **Denmark, Sweden, Norway, and Finland** compared to previous year. *In Denmark and Norway overnights increased by two-digit growth rates also compared to year 2019. Finland's foreign overnights were 10% below and Sweden's 1% below 2019 level. Finland's market share of foreign overnights was 12% in 2024, while it was 14% in 2019.*
- Foreign overnights **in December increased clearly in Finland, Denmark, and Norway** compared to previous year, while Sweden experienced small decline. *In comparison to December 2019, foreign overnights were clearly above those figures in all four countries: in Finland +15%, in Denmark +31%, in Sweden +8%, and in Norway +41%.*

Summary

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

Travel related searches in 2024

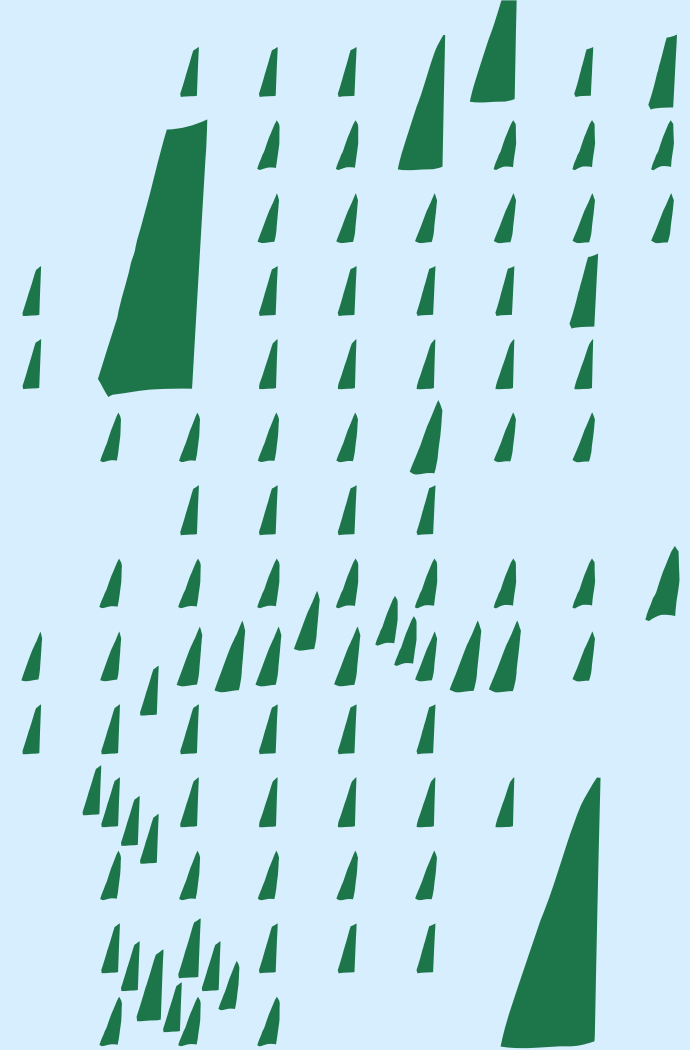
- Travel related searches for Finland continued their growth also in 2024. There were internationally **8.5 million searches on travel to Finland**, which was **15% more than in 2023**.
- Biggest source markets for the searches were **USA, Japan, Germany**, and **UK**.
- **Growth** in searches came mainly from **overseas markets** and **UK**.
- **Sauna** was the most searched topic, followed by **Hotels, Santa Claus, Northern lights**, and **Cities**. Popular topics remained quite the same as during the previous years as well.

Flight capacity and bookings for Jan-Mar 2025

- For the first quarter of the year, capacity is **improving both to Finland and Norway** compared to previous year. Seat capacity is approximately *10% below pre-pandemic levels in Finland and Norway*.
 - Capacity to **Sweden** is nearly on the same level than last year, *remaining 26% below pre-pandemic level*.
- Flight arrivals/bookings for Q1-2025 are **growing to Finland and Norway** compared to the previous year *and to 2019*. Bookings to Sweden are on the same level as last year, *but 11% below those of 2019*.
 - Bookings made by the 2nd of February shows that **Norway leads the way** with over 338,000 bookings, and **Finland comes second** with nearly 319,000 bookings.
 - **Germany** is clearly **the biggest source country to Finland** and the bookings are **growing both compared to previous year and to year 2019**.
 - From the other biggest source markets, where bookings to Finland are increasing both compared to previous year and to 2019, are **USA, Switzerland, Spain, Denmark**, and **Belgium**.

Border Survey

Year 2024



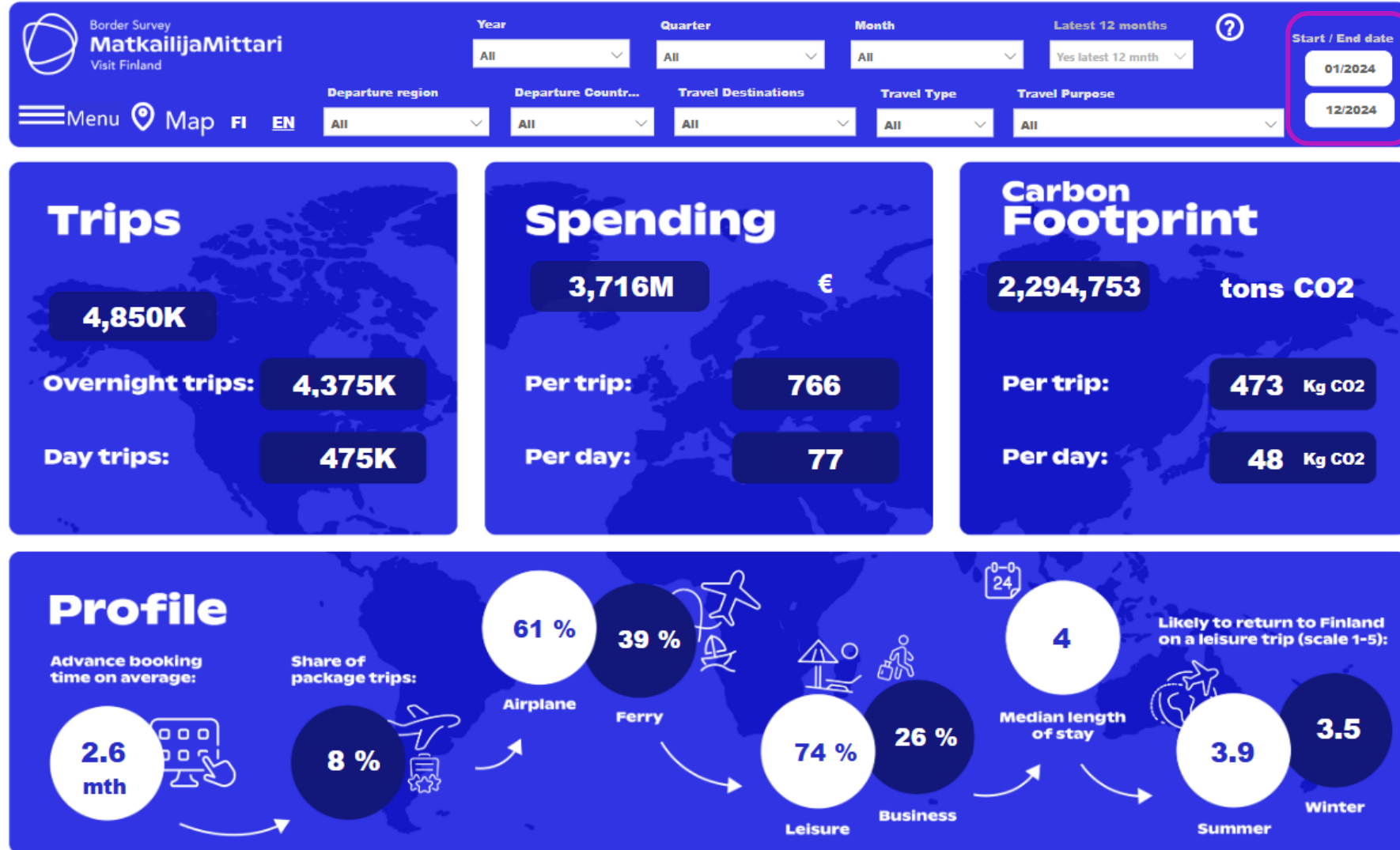
Border Survey / Year 2024

Foreign visitors in Finland

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

Year 2024

- Nearly **4.9 million** visitors
 - 90% overnight trips
- Spending over **3.7 billion€**
 - 766 € / trip
 - 77 € / day
- 74%** travelling for leisure
- Median length of stay **4 nights**



Border Survey / Year 2024

Foreign visitors in Finland

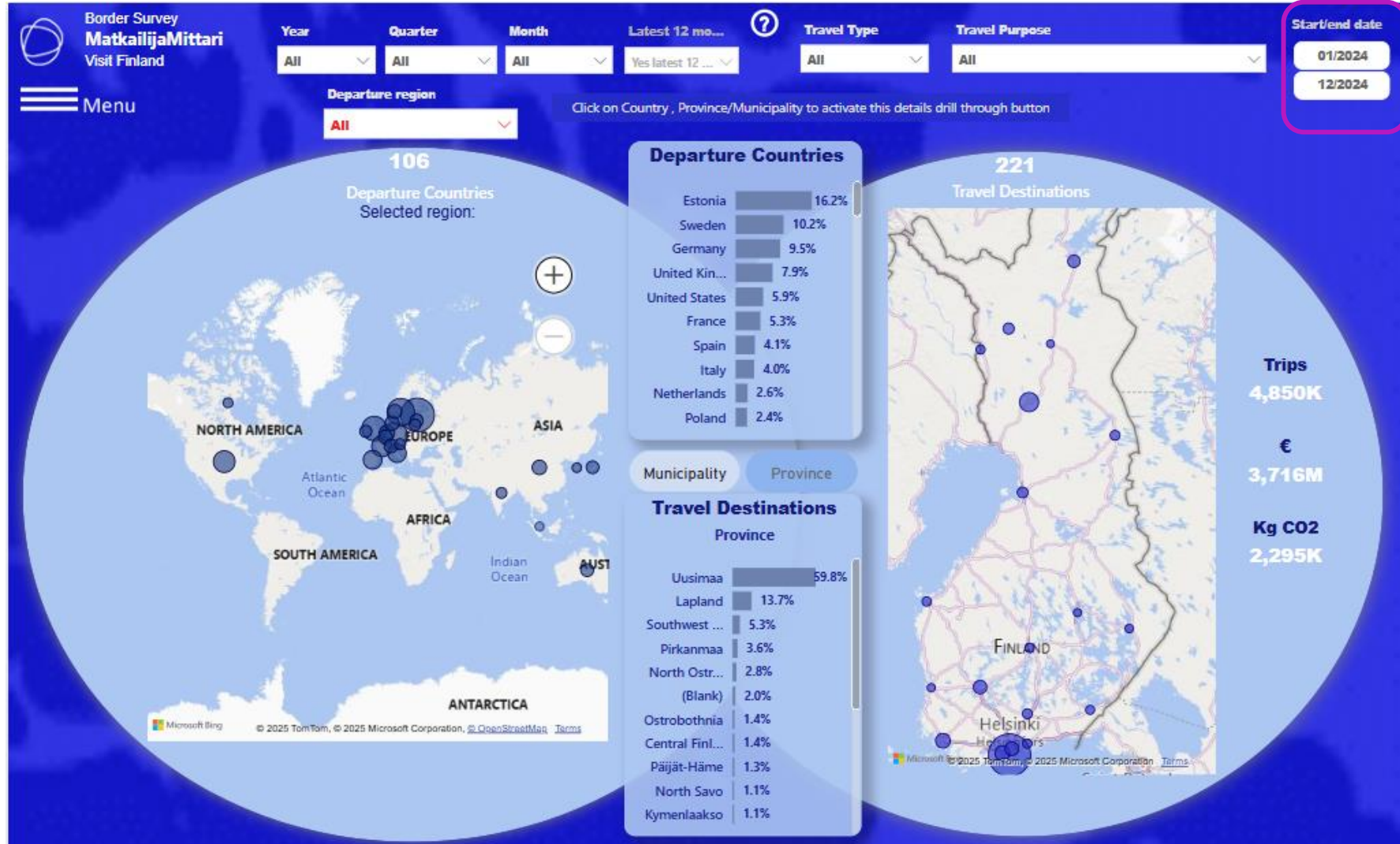
[Link to the report: Matkailijamittari - Visit Finland](#)

- Visitors from **106 source markets**

- Biggest volumes from Estonia, Sweden, Germany, UK, USA, France, Spain, and Italy

- Foreign travellers visited **221 destinations** in Finland

- Most popular destination was Helsinki region in Uusimaa county
- Lapland was equally popular with Uusimaa during December. Lapland's share of visitors decreased clearly during the summer months but started to increase towards the winter months from September onwards.

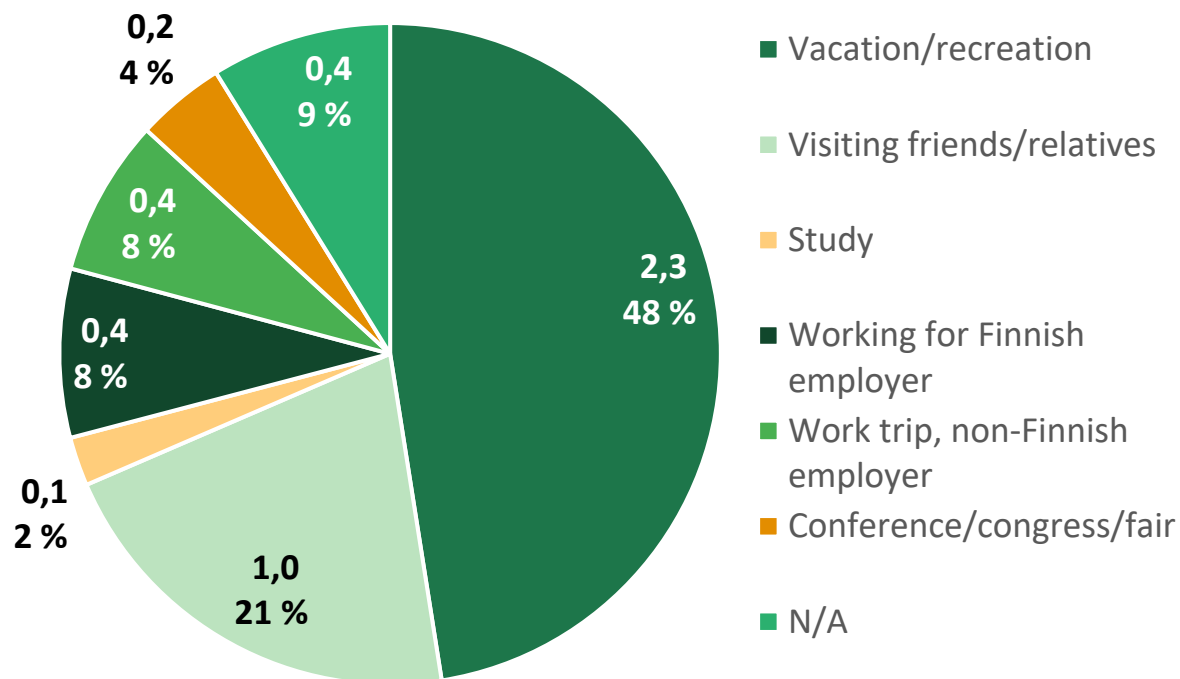


Trips & Spending by travel purpose / Year 2024

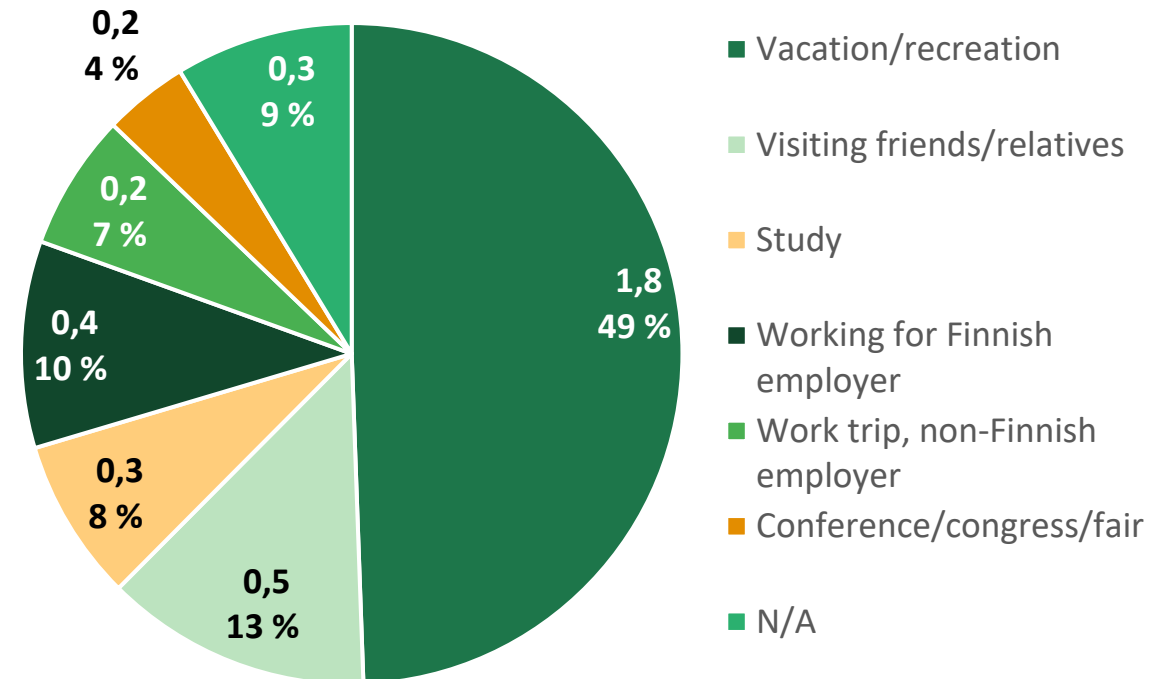
Foreign visitors in Finland

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

Trips to Finland, million



Spending in Finland, billion€



Highest median length of stay

- Study **50 nights**
- Visiting friends/relatives **5 nights**
- Working for Finnish employer **5 nights**

Highest spend per day

- Conference, congress, fair **150 €**
- Vacation/recreation **130 €**
- Work trip, non-Finnish employer **87 €**

Highest carbon efficiency (€/CO2)

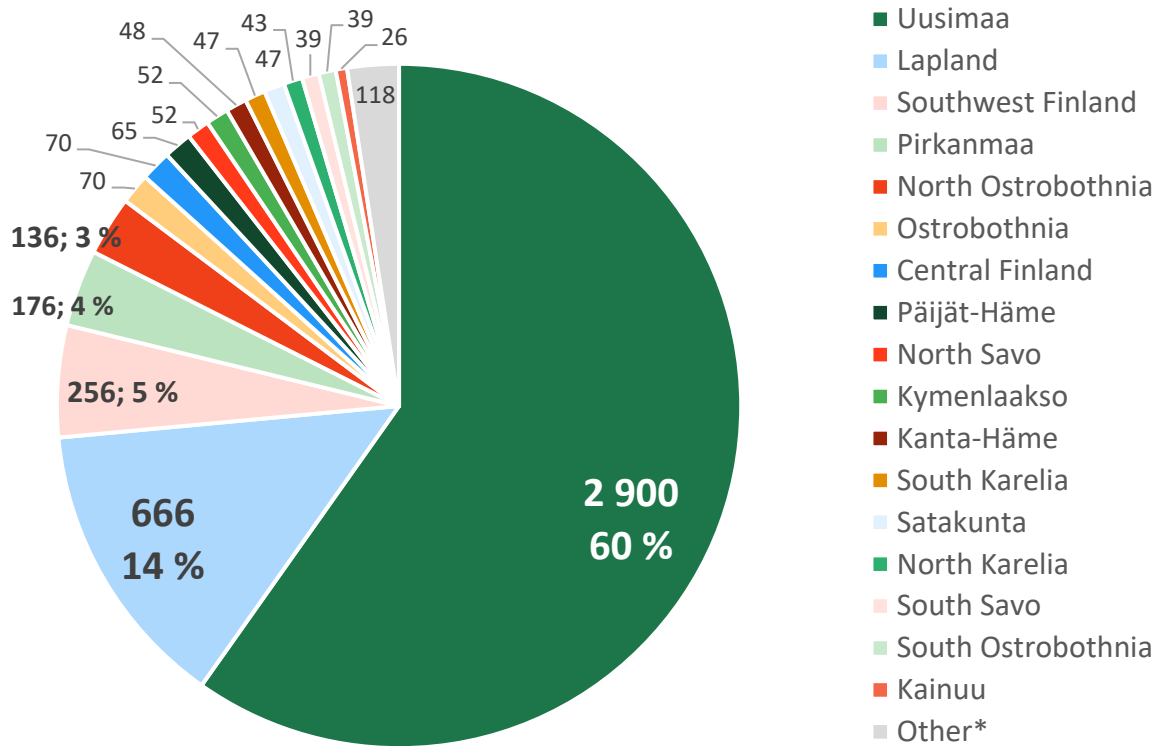
- Working for Finnish employer **1.9**
- Conference, congress, fair **1.8**
- Work trip, non-Finnish employer **1.7**
- Vacation/recreation **1.7**

Trips & Spending by main destination / Year 2024

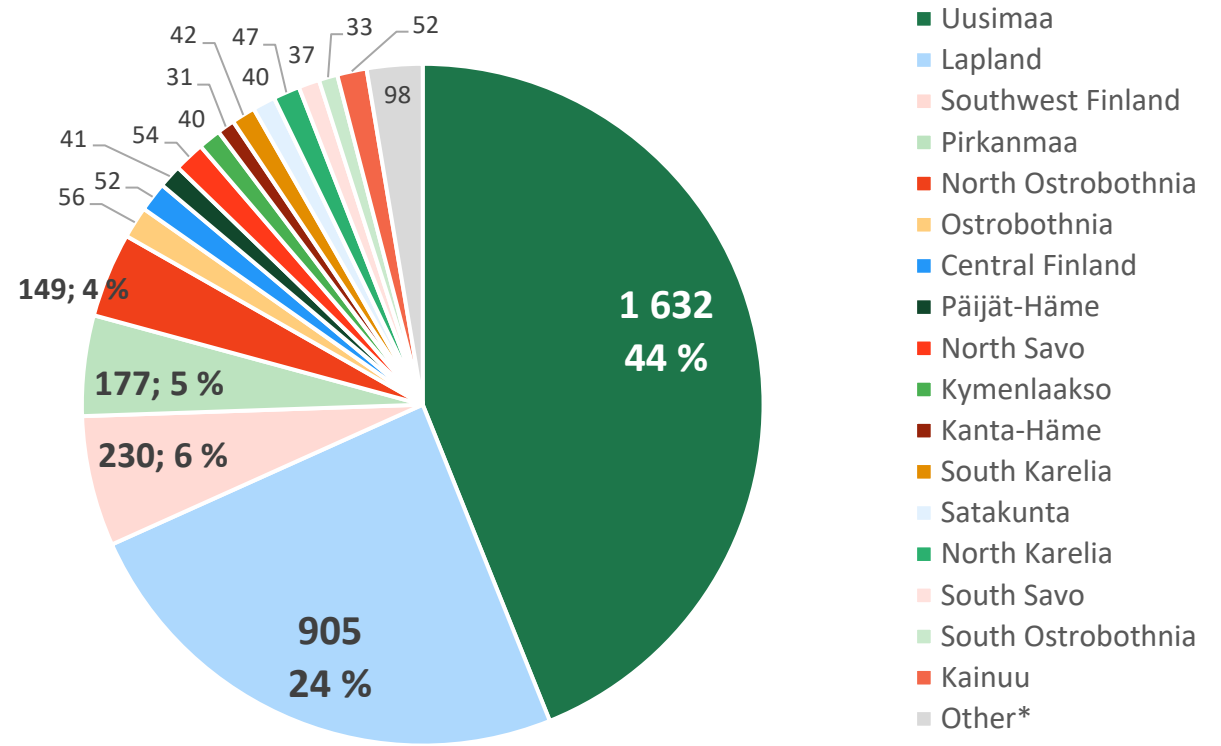
Foreign visitors in Finland

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

Trips to Finland (thousand) by main destination



Spending in Finland (M€) by main destination



Highest median length of stay, when main destination was

- South Savo **11 nights**
- North Karelia **10 nights**
- North Savo **10 nights**
- North Savo **10 nights**

Highest spend per day, when main destination was

- Lapland **172 €**
- Kainuu **130 €**
- Uusimaa **76 €**
- Pirkanmaa **71 €**

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

903,600

+16% (+15%)

Dec/24 foreign overnights in FIN



143,100

+23% (+17%)

Jan/25 int'l flight arrivals (incl. low-cost carriers) to FIN



169,100

+16% (+18%)

Feb/25 outlook for int'l flight bookings to FIN



843,800

+12% (-12%)

Jan/25 flight seat capacity to FIN



809,900

+14% (-8%)

Feb/25 outlook for seat capacity to FIN



Several months' view

6,4M

+11% (-10%)

01-12/24 foreign overnights in FIN



840,500

+13% (-10%)

08/24 – 01/25 (6 mths) arrivals (incl. low-cost carriers) to FIN



796,500

+7% (-13%)

02-07/25 (6 mths) outlook for flight bookings to FIN



5.2M

+9% (-16%)

08/24 – 01/25 (6 mths) flight seat capacity to FIN



5.6M

+10% (-11%)

02-07/25 (6 mths) outlook for seat capacity to FIN



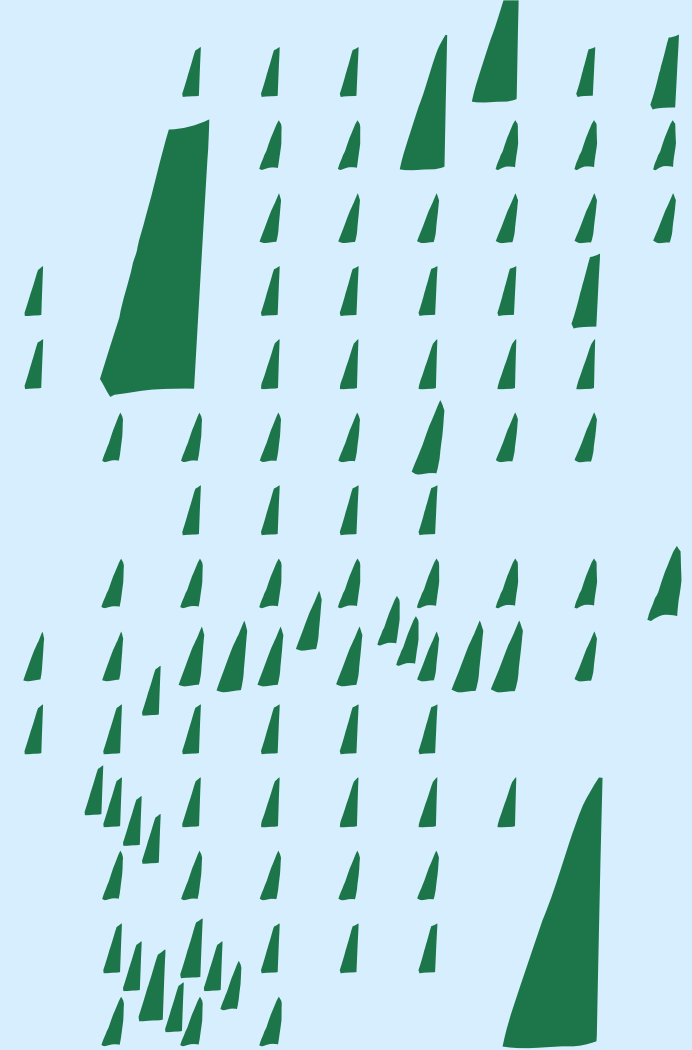
Registered overnights

- Year 2024

- There were **6.4M registered foreign overnights** in Finland last year which amounted to **28% of the total number of overnights**. Foreign overnights increased by **11%** compared to previous year but *remained 10% below the level of 2019*.
- The biggest source markets were **Germany, UK, Sweden, USA, France, and the Netherlands**.
- **Total accommodation revenue** was **1.5 billion€** and it increased by 2% compared to previous year. The share of **foreign revenue** was **34%** of total revenue. Foreign accommodation revenue increased by **16%**, while domestic revenue decreased by 4% compared to previous year.

- December 2024

- Foreign overnights: All time highest number of monthly foreign overnights, **903,600** (**+16%** vs. 12/2023 & **+15%** vs. 12/2019)
- Top source markets: **UK** (27% of total foreign), **France, Germany, Spain, USA, Singapore**
- Main destinations: **Helsinki, Rovaniemi, Inari-Saariselkä, Kittilä-Levi, Ruka-Kuusamo, Kolari-Ylläs, Vantaa, Sodankylä**



Registered overnights year 2024

	Year 2024	Change-% vs. year 2023	Change-% vs. year 2019
Total	22.70M	-1%	-2%
Domestic	16.3M	-4%	+2%
Foreign, total	6.4M	+11%	-10%
Foreign excl. Russia	6.4M	+11%	+2%
Scandinavia	829,900	+5%	-6%
EU-27 + UK	4.0M	+6%	+6%
America	589,900	+16%	+35%
Asia	860,300	+33%	-29%



Main source markets

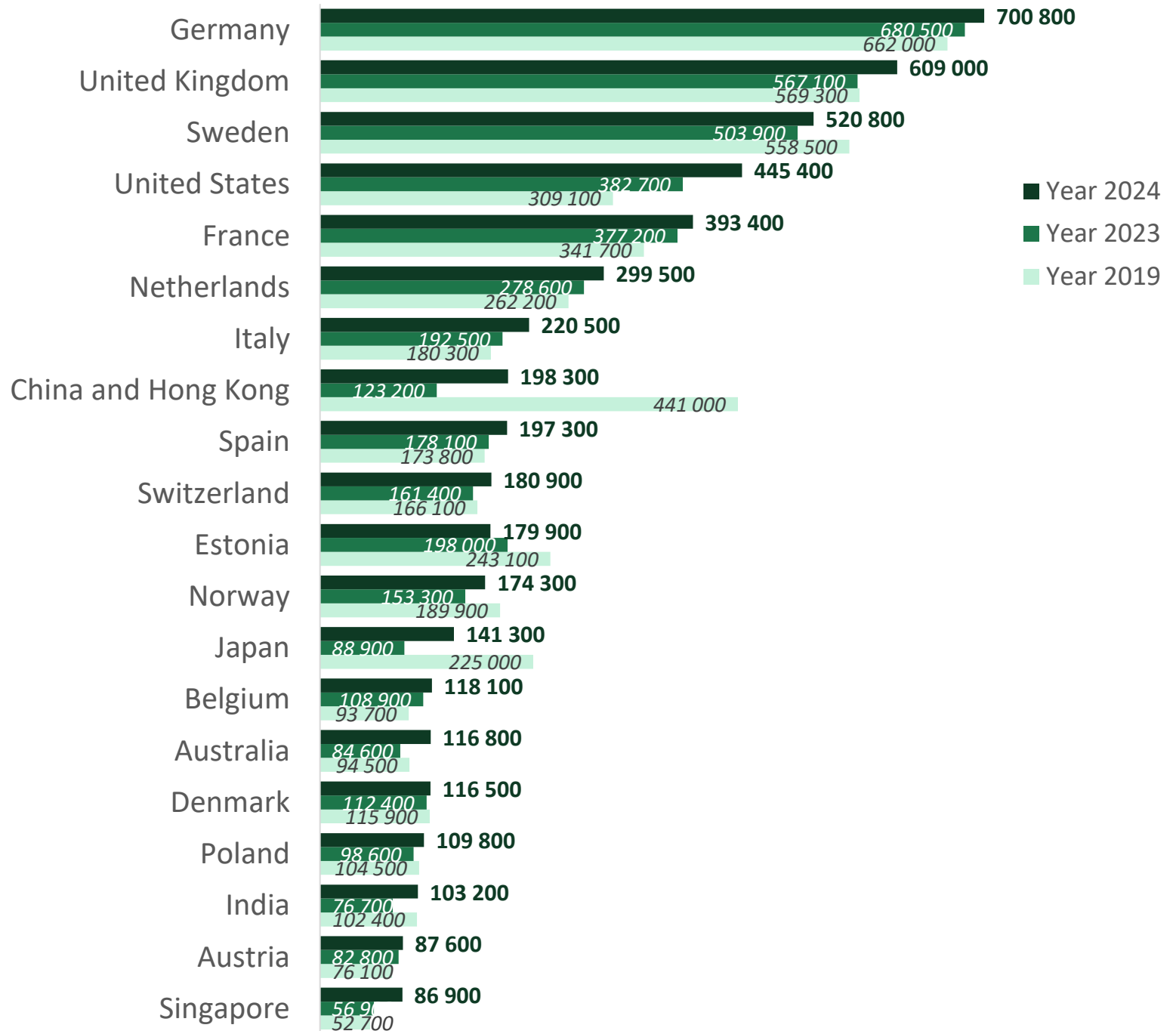
Year 2024 vs. year 2023 & year 2019

In **2024**, number of overnights have increased from **each of the main source markets**, except Estonia, **compared to previous year**.

In addition, overnights **exceeded also 2019 figures from most of the biggest source markets**, except from the neighboring countries (Sweden, Estonia and Norway) as well as from China & Hong Kong and Japan.

Compared to 2019, **Italy, Spain, and Switzerland** have entered the **top10 source markets**, while Estonia's and Japan's ranking (in addition to Russia) has dropped outside the top10.

Source: Visit Finland Statistics Service Rudolf, Statistics Finland





Year 2024

Year: 2019 2020 2021 2022 2023 **Latest** 2025

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

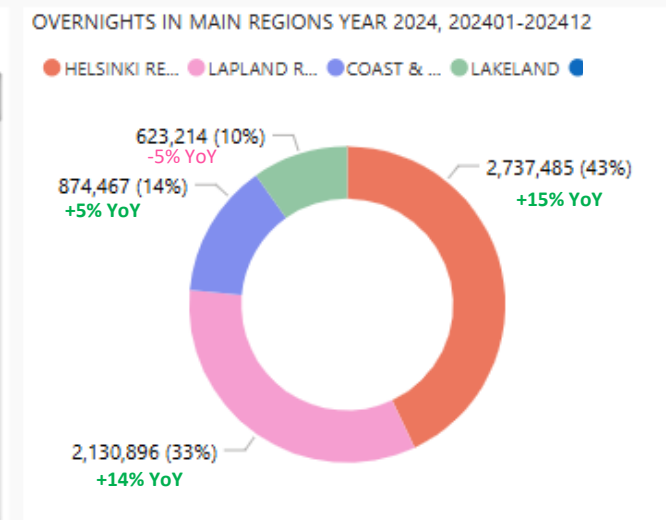
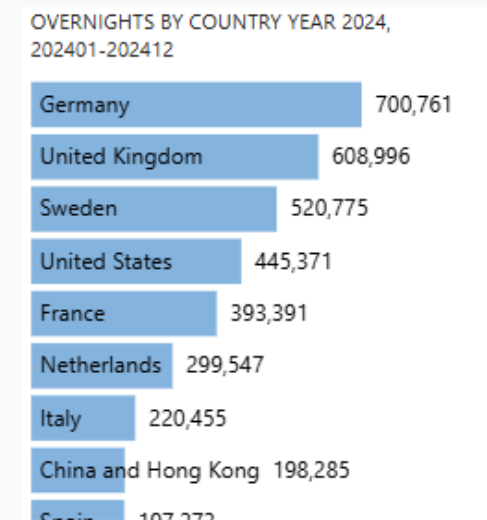
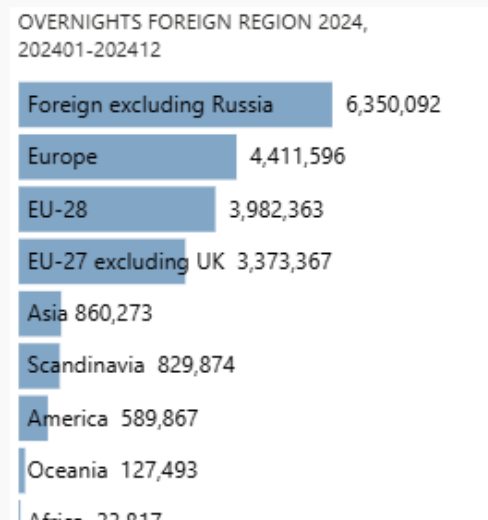
Overnights 22.7M TOTAL overnights	YoY change % -1 YoY change %	Foreign 6.4M Overnights	YoY change % 10.7 Foreign	Domestic 16.3M Overnights	YoY change % -4 Domestic	Revenue 1.5bn TOTAL revenue	YoY change % 2 YoY change %
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View Main regions, Regions by

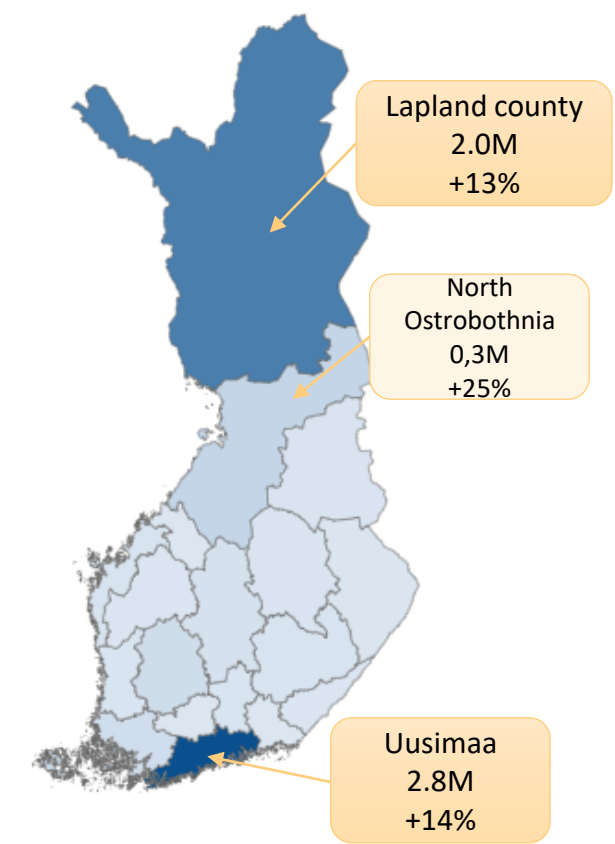
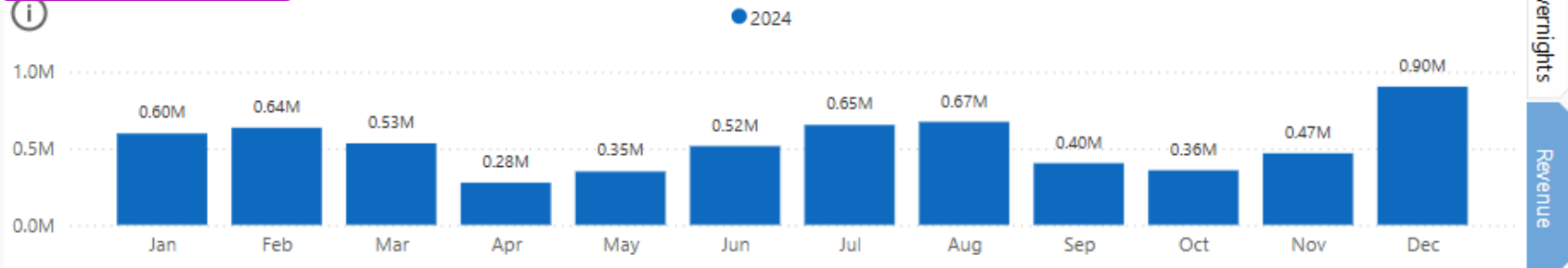
Domestic **Foreign**

[VIEW REVENUE DETAILS](#) [VIEW OVERNIGHT DETAILS](#)

REGIONAL OVERNIGHTS



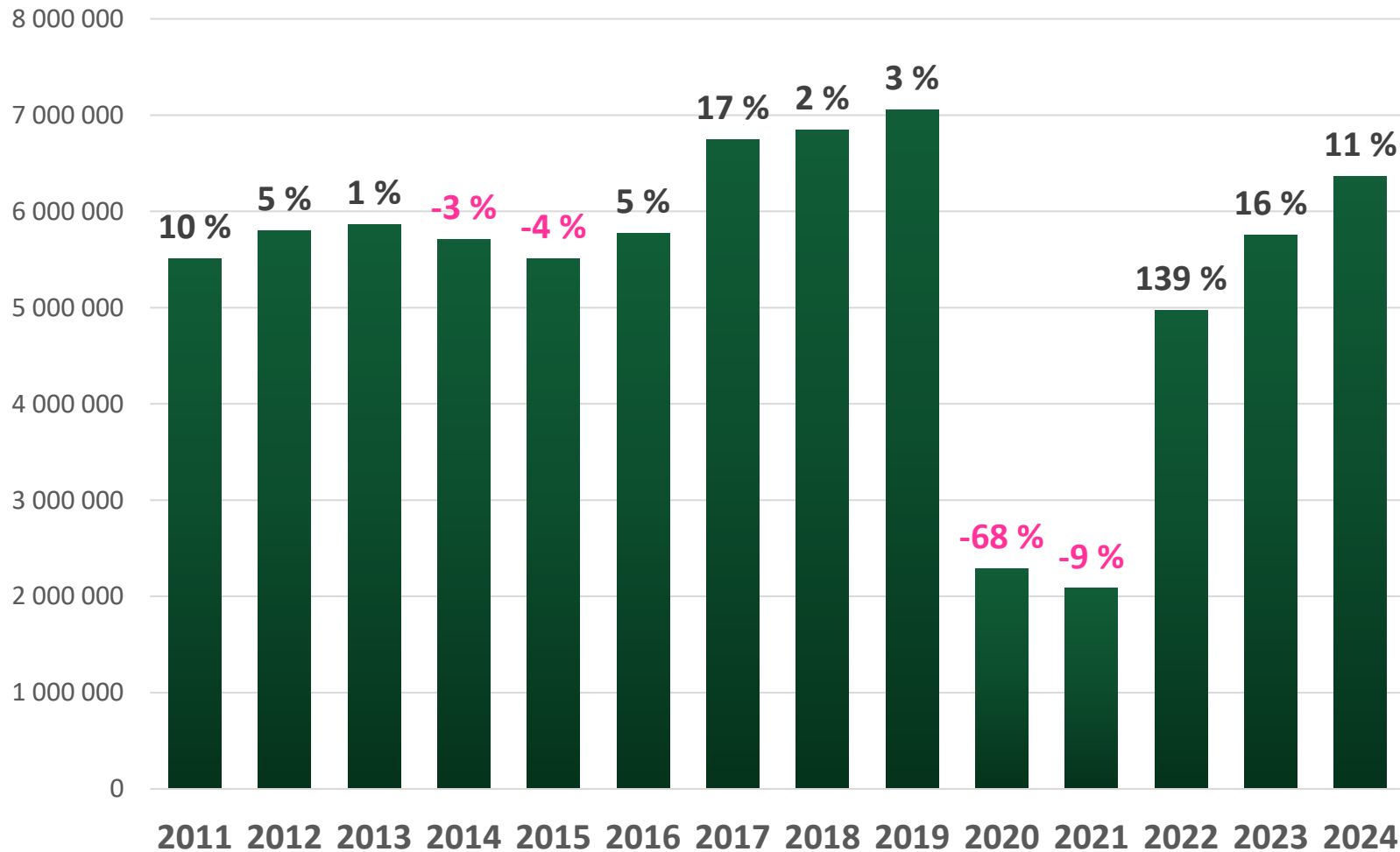
FOREIGN OVERNIGHTS 2024



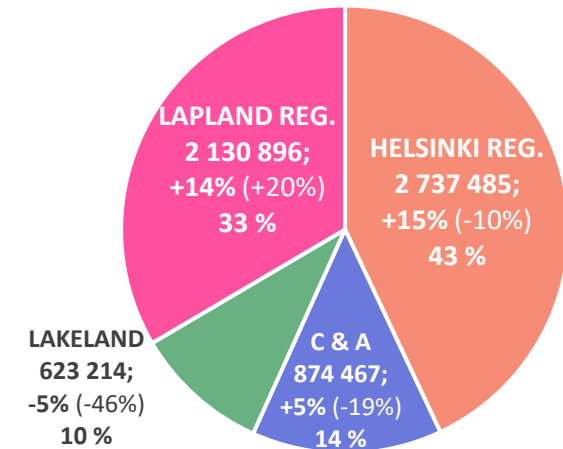
Sources: Statistics Service Rudolf, Statistics Finland

Foreign overnights in Finland 2011-2024

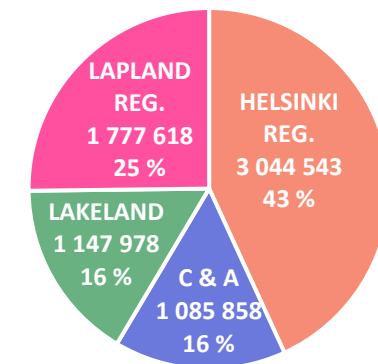
And distribution of foreign overnights in main regions in 2024 vs. 2019



Foreign overnights in main marketing areas
Year 2024 & change-% vs. 2023 & (2019)



Foreign overnights in main marketing areas
Year 2019



Year 2024: Main source markets in main regions

Helsinki region

2.7M overnights
+15% vs. year 2023
-10% vs. year 2019

Coast & archipelago

0.9M overnights
+5% vs. year 2023
-20% vs. year 2019

Lakeland

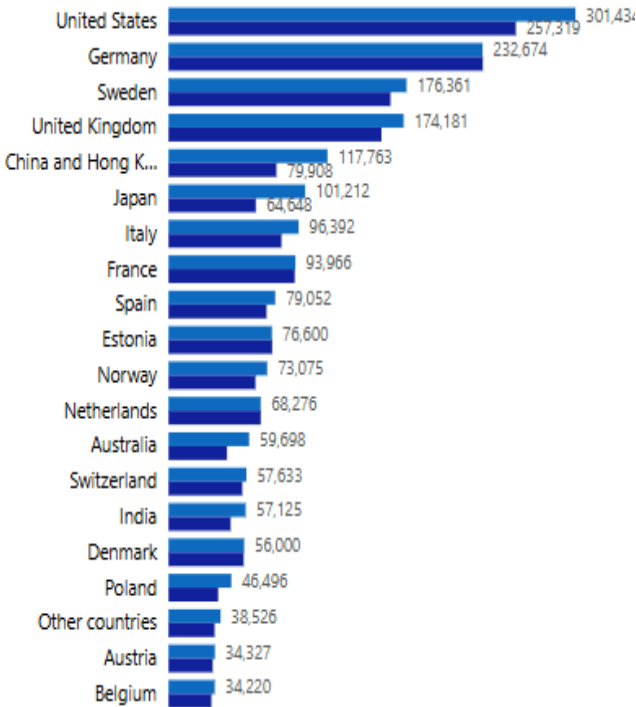
0.6M overnights
-5% vs. year 2023
-46% vs. year 2019

Lapland region

2.1M overnights
+14% vs. year 2023
+20% vs. year 2019

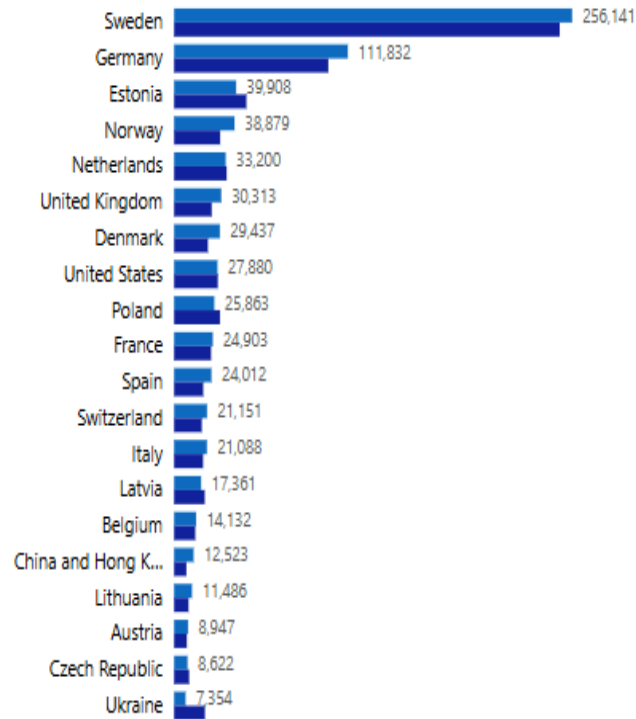
OVERNIGHTS 2024 compared to 2023 months 1-12 HELSINKI REGION Uusimaa 1 (Helsinki Metropolitan Area)

● MAX year ● MIN year



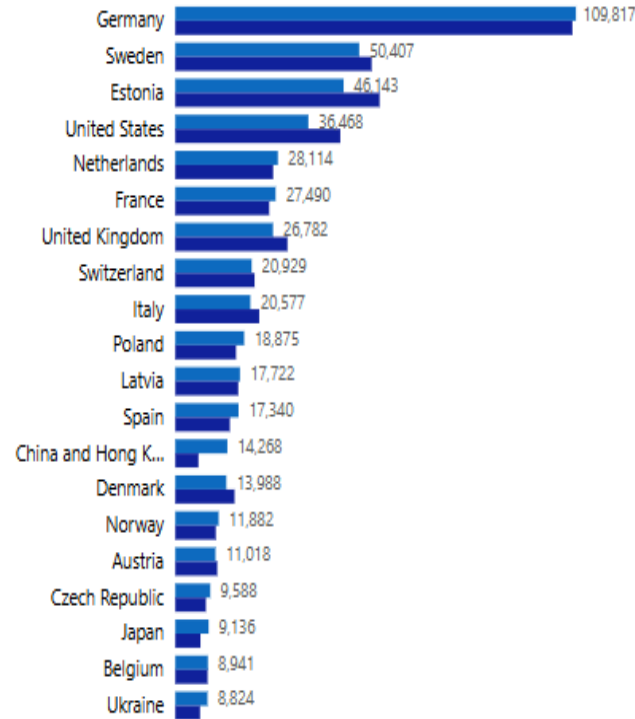
OVERNIGHTS 2024 compared to 2023 months 1-12 COAST & ARCHIPELAGO

● MAX year ● MIN year



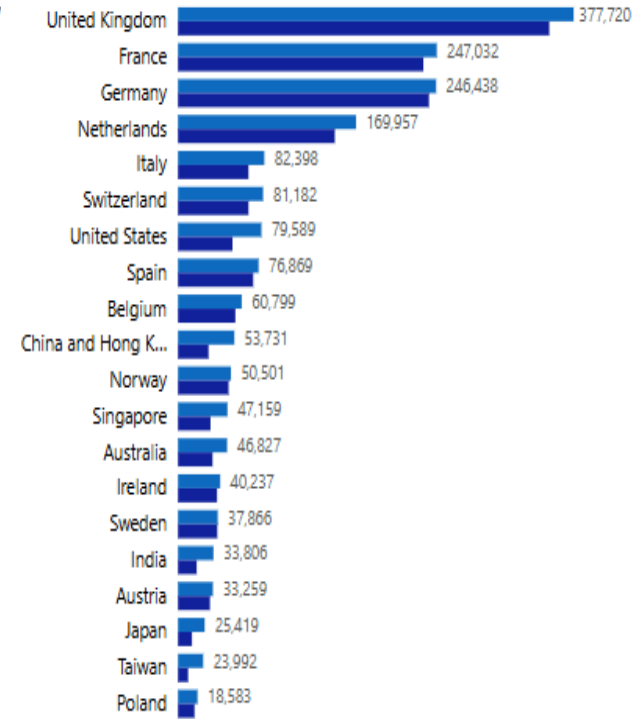
OVERNIGHTS 2024 compared to 2023 months 1-12 LAKELAND

● MAX year ● MIN year

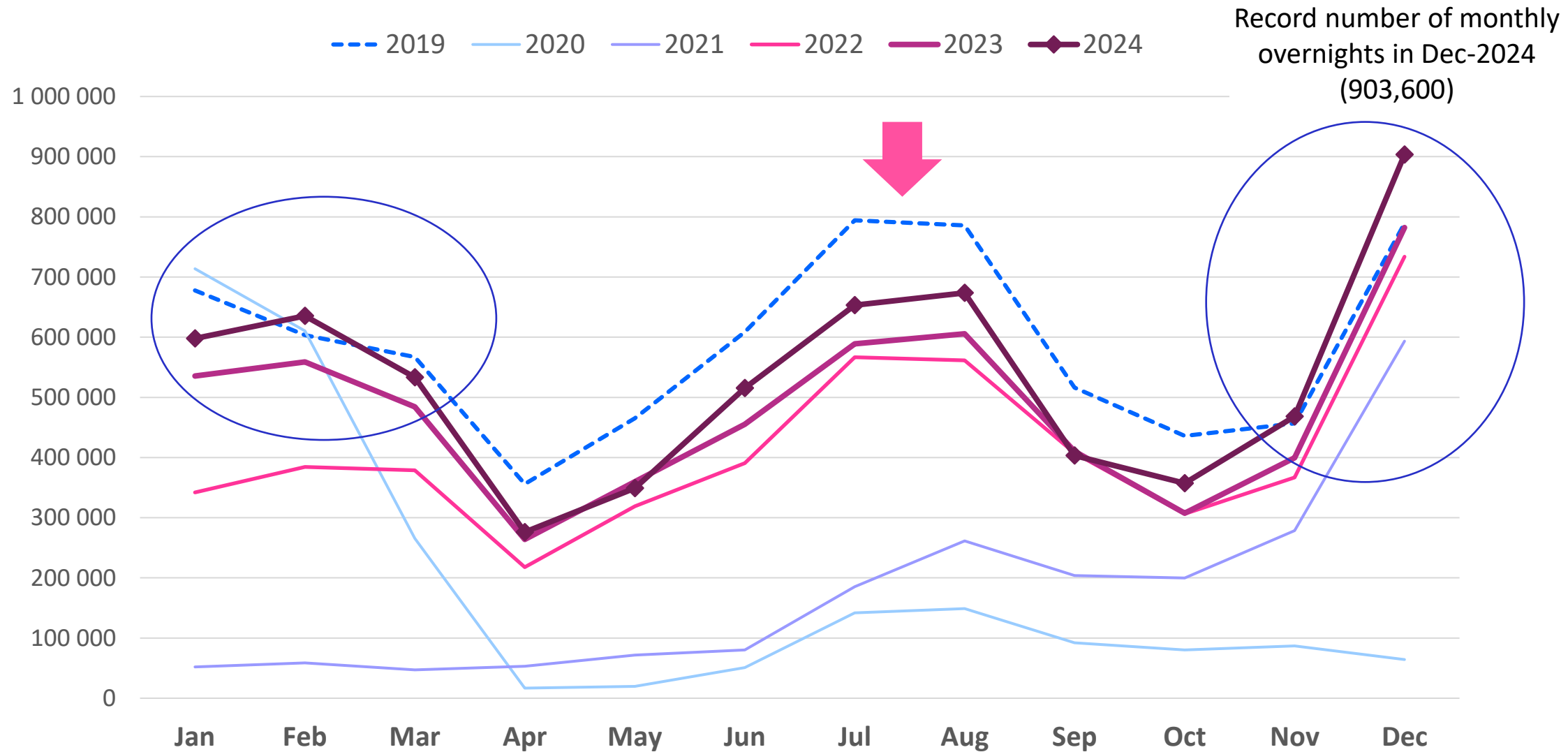


OVERNIGHTS 2024 compared to 2023 months 1-12 LAPLAND REGION

● MAX year ● MIN year



Foreign overnights by month 2019-2024



Record high month of foreign overnights in December

December 2024

903,600 total foreign overnights;
+16% vs. 12/2023, (15% vs. 12/2019)

902,100 foreign excl. Russia; +16%, (+26%)

589,500 EU+UK; +6%, (+25%)

145,900 Asia; +40%, (+4%)

57,700 America; +38%, (+109%)

36,500 Scandinavia; +2%, (0%)

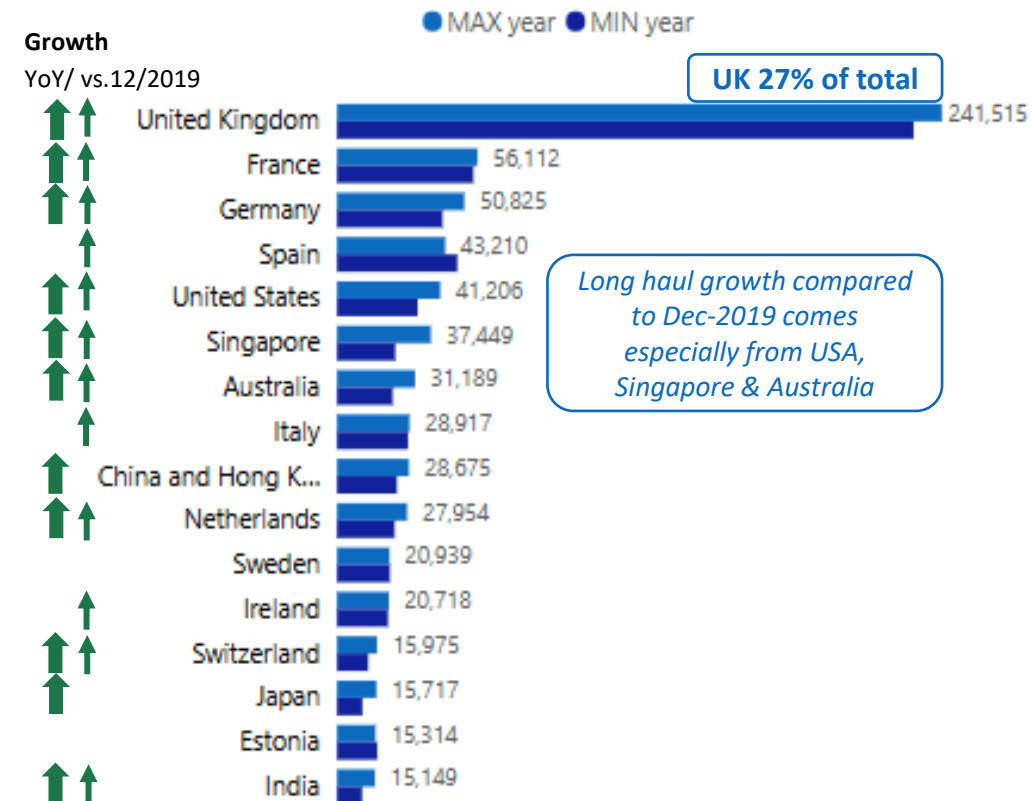
Top destinations

total foreign; vs. 12/2023, (vs. 12/2019)

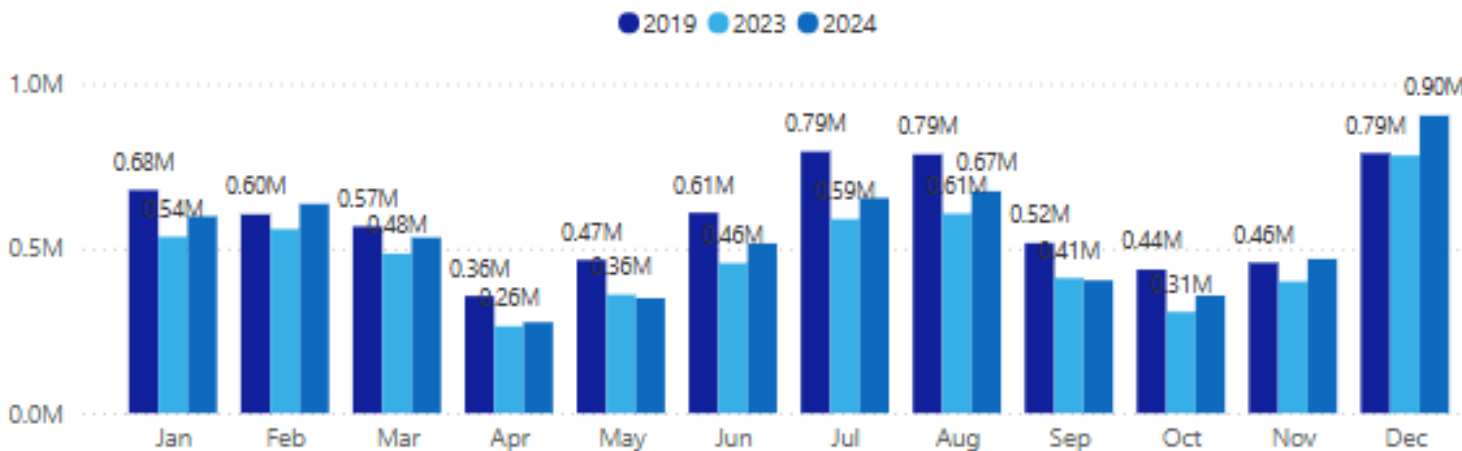
- **189,500 Helsinki**; +27%, (+5%)
- **146,700 Rovaniemi**; +2%, (+26%)
- **89,900 Inari-Saariselkä**, +5%, (+12%)
- **89,500 Kittilä-Levi**, +13%, (+35%)
- 48,200 Kuusamo-Ruka, +12%, (+36%)
- 46,200 Kolari-Ylläs, -2%, (+4%)
- 41,000 Vantaa; +41%, (+30%)
- 38,400 Sodankylä, +18%, (+20%)

Top source markets, total foreign; vs. 12/2023

OVERNIGHTS 2024 compared to 2023 months 12-12



FOREIGN OVERNIGHTS



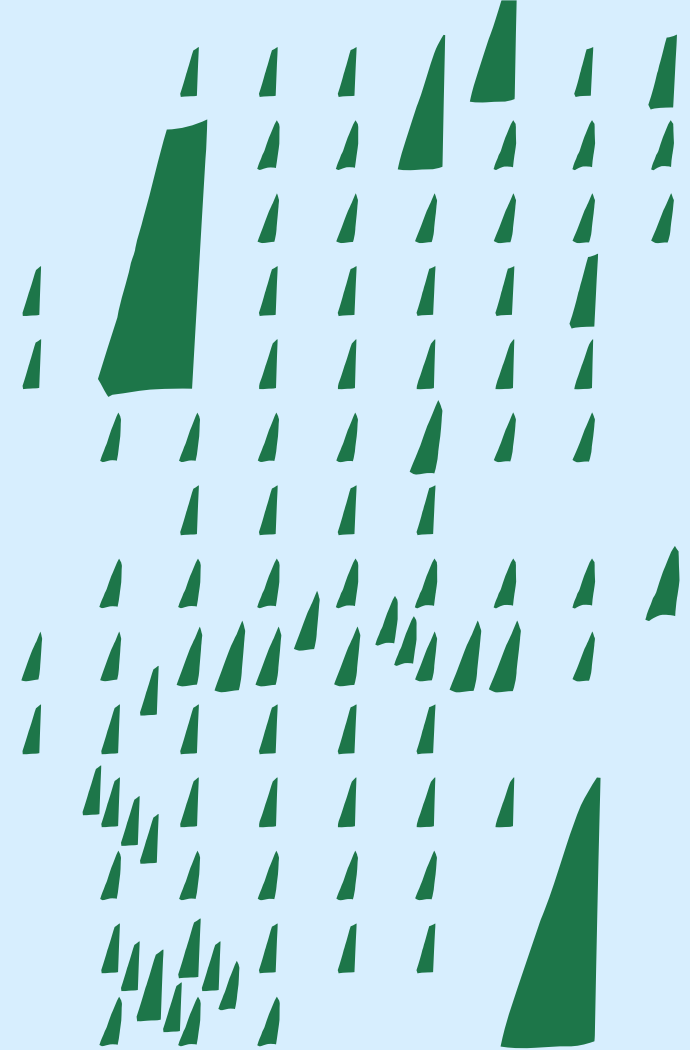
Registered foreign overnights in the Nordics

Please note:

As Iceland is currently undergoing revisions in their statistics, the total number of foreign overnights of 2024 is not available, so an estimate based on year 2023 is used instead.

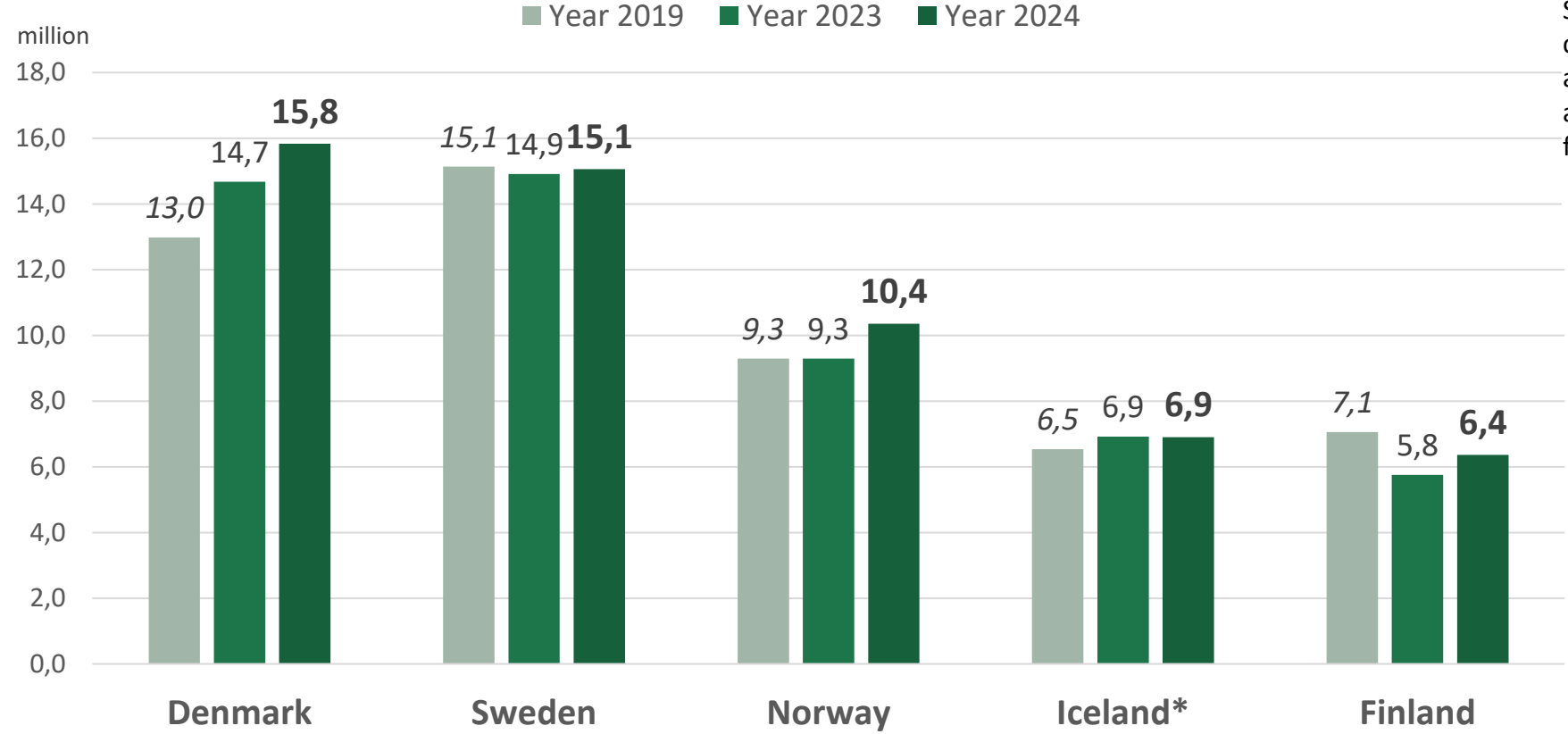
Overnights in 2024 & in December

- **Number of foreign overnights increased clearly in 2024** in Denmark, Sweden, Norway, and Finland compared to previous year. *In Denmark and Norway overnights increased by two-digit growth rates also compared to year 2019. Finland's foreign overnights were 10% below and Sweden's 1% below 2019 level. Finland's market share of foreign overnights was **12% in 2024**, while it was 14% in 2019.*
- Foreign overnights **in December increased** clearly in **Finland, Denmark, and Norway** compared to previous year, while Sweden experienced small decline. *In comparison to December 2019, foreign overnights were clearly above those figures in all four countries; in Finland +15%, in Denmark +31%, in Sweden +8%, and in Norway +41%.*



Foreign overnights in Nordics in 2019, 2023 & 2024

Please note:
 Statistics **Iceland** is currently conducting revisions on their accommodation statistics, so an estimate based on 2023 figures is used instead.

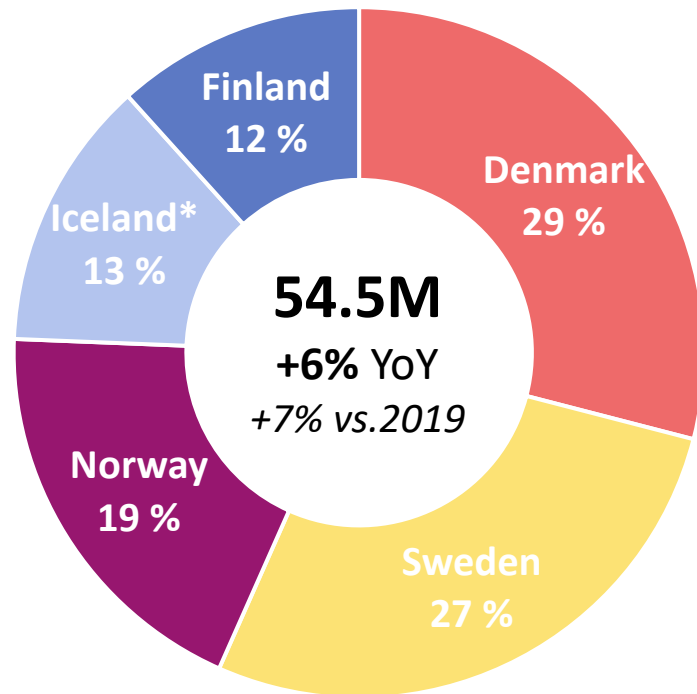


	Denmark	Sweden	Norway	Iceland*	Finland
2024 vs. 2023	+8%	+1%	+11%	N/A	+11%
<i>2024 vs. 2019</i>	<i>+22%</i>	<i>-1%</i>	<i>+11%</i>	N/A	<i>-10%</i>

Travel to the Nordic countries

Market shares of foreign overnights in 2024 & main source markets

Market shares of foreign overnights



***) Please note:**

- Iceland is currently conducting revisions on 2024 data
 → estimate with year 2023 figures is used

Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2024-31.12.2024

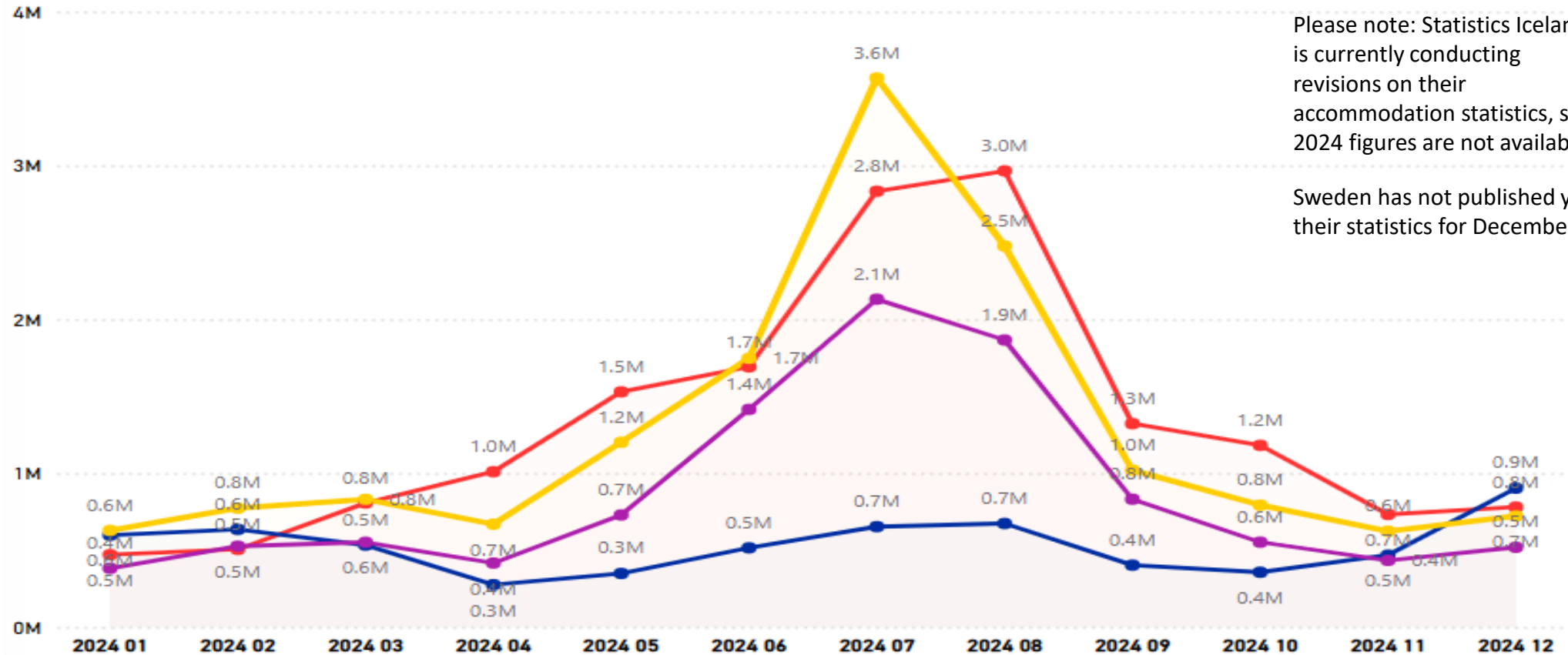


- Germany clearly the biggest source market, with nearly half of the overnights in Denmark
- Finland's market share above the share of total foreign (12%) in VF's target markets:
 - Japan (Finland market leader)
 - China & Hong Kong
 - France
 - Spain
 - UK

Monthly foreign overnights in the Nordics in 2024

[Link to the report: Nordic comparison on nights spent - Visit Finland](#)

Monthly overnights
WHOLE COUNTRY Foreign 1.1.2024-31.12.2024
● Denmark ● Finland ● Norway ● Sweden



Please note: Statistics Iceland is currently conducting revisions on their accommodation statistics, so 2024 figures are not available.

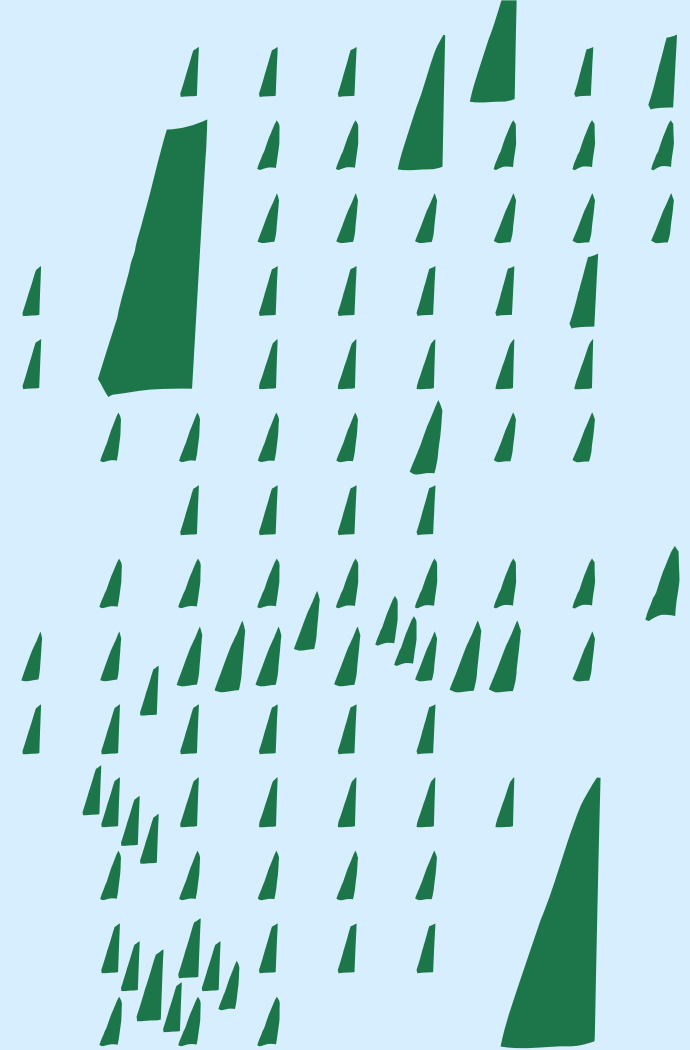
Sweden has not published yet their statistics for December.

YoY change	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
DK	8%	8%	35%	-11%	16%	3%	1%	6%	12%	17%	18%	19%
SE	5%	8%	20%	-16%	10%	3%	-3%	3%	-1%	-6%	0%	-2%
NO	18%	20%	29%	8%	14%	1%	4%	5%	17%	30%	35%	33%
FI	12%	14%	10%	5%	-3%	13%	11%	11%	-2%	16%	17%	16%

Digital Demand

Travel related searches 2024

- Travel related searches for Finland continued their growth also in 2024. There were internationally **8.5 million searches on travel to Finland**, which was **15% more than in 2023**.
- Biggest source markets for the searches were **USA, Japan, Germany, and UK**.
- Growth in searches came mainly from **overseas markets** and **UK**.
- **Sauna** was the most searched topic, followed by **Hotels, Santa Claus, Northern lights, and Cities**. Popular topics remained quite the same as during the previous years as well.



Travel related searches for Finland 2024 vs. 2023

8,529,157

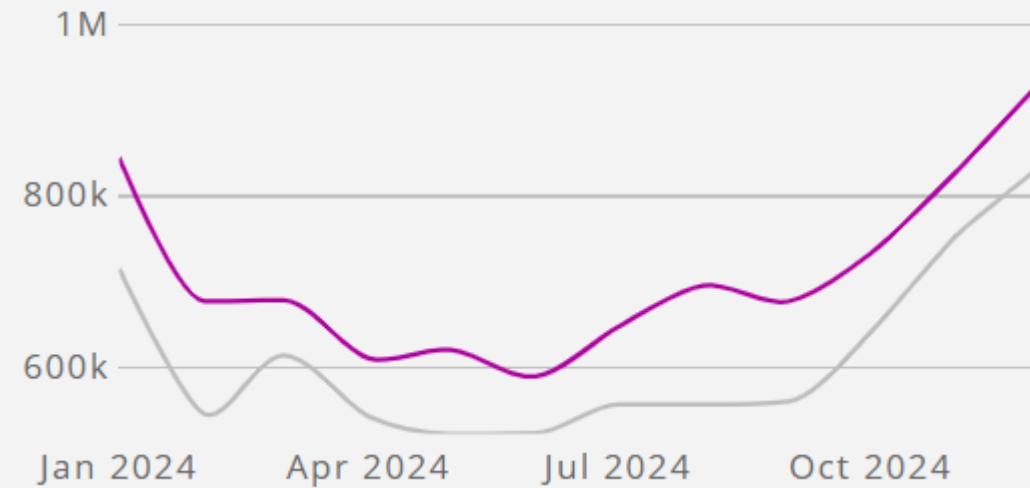
'Jan 2024 - Dec 2024'

15%

Growth

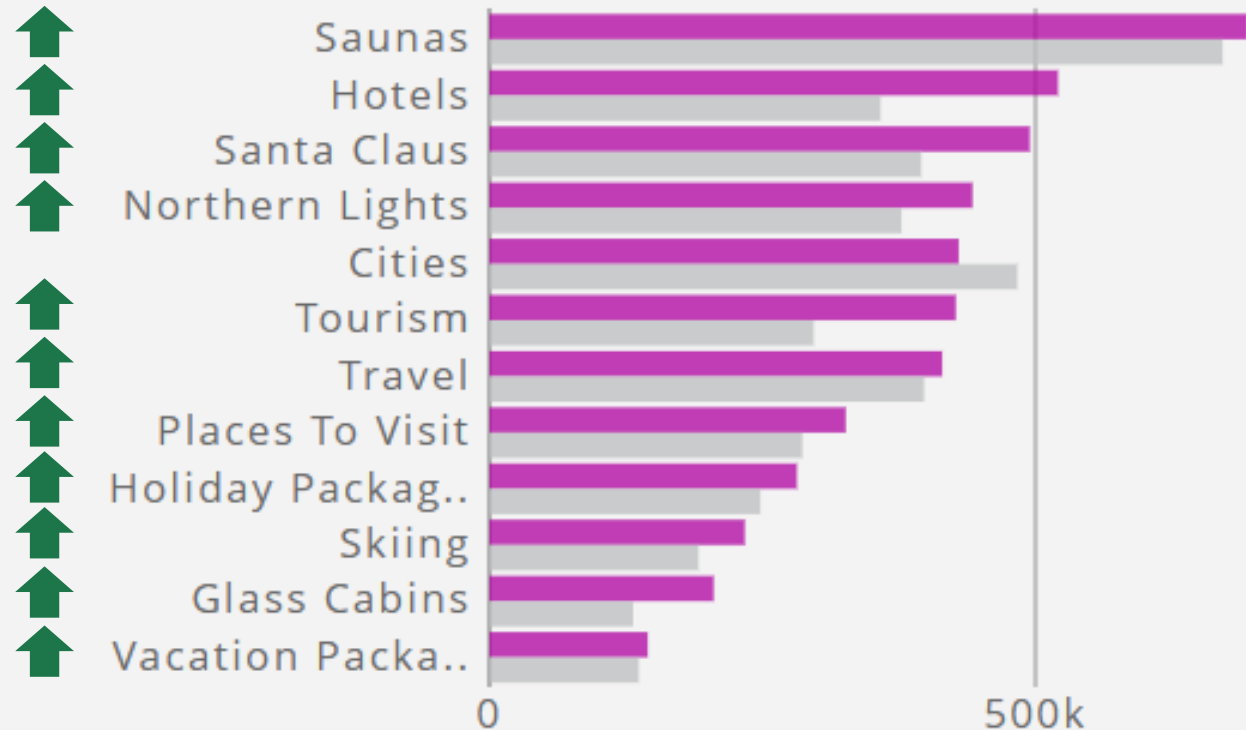
Seasonality

- Jan 2024 - Dec 2024
- Jan 2023 - Dec 2023



















Micro - Brandtags Popularity











- Jan 2024 - Dec 2024
- Jan 2023 - Dec 2023



Growth mainly from overseas markets and UK

Searches decreased from neighbouring countries, Sweden and Estonia

Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
1		United States	983,170	51% 
2		Japan	871,460	15% 
3		Germany	758,470	-4%
4		United Kingdom	572,410	21% 
5		Italy	334,210	-4%
6		France	329,260	-6%
7		India	285,960	43% 
8		Spain	244,390	-1%
9		Sweden	198,110	-12% 
10		Canada	197,980	27% 

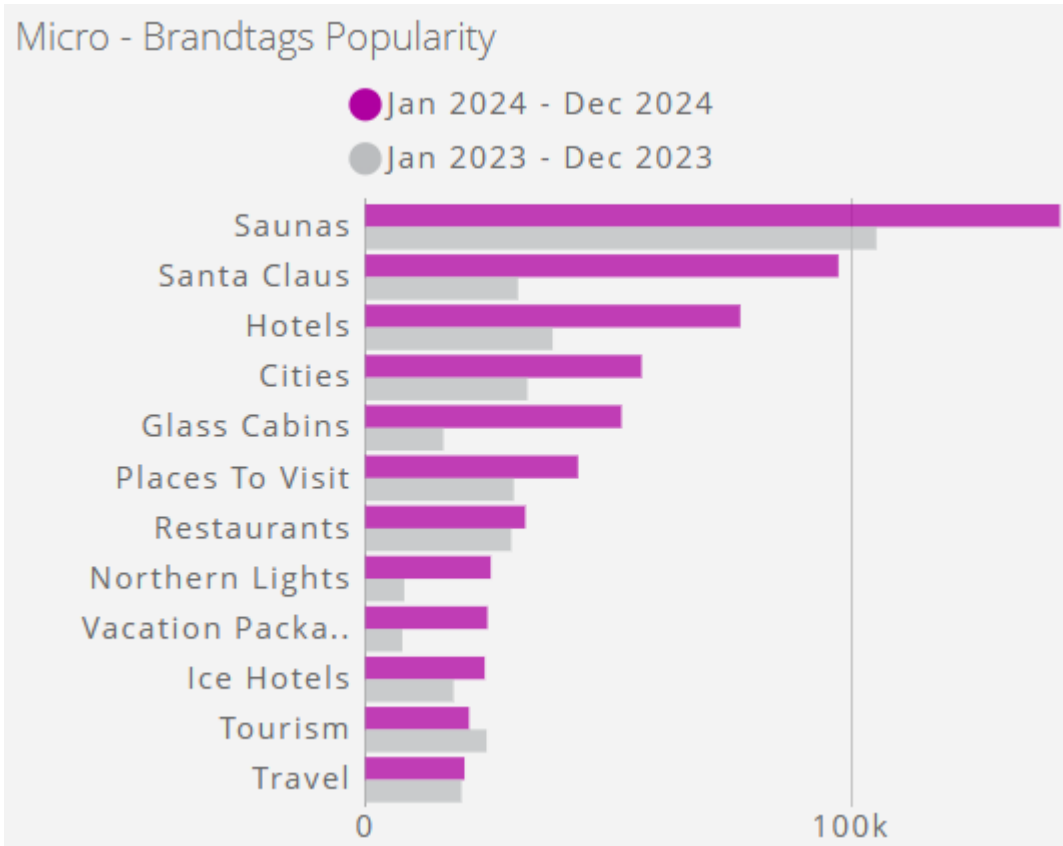
Target Market Distribution				
Rank	Flag	Target Market	Searches	Growth
11		Netherlands	193,860	0%
12		Australia	167,470	23% 
13		Estonia	164,110	-19% 
14		Switzerland	163,610	0%
15		Austria	124,860	2%
16		China	95,167	-8%
17		Belgium	89,280	-3%
18		South Korea	75,090	6%

Top12 themes by source market

Differences with total int'l themes

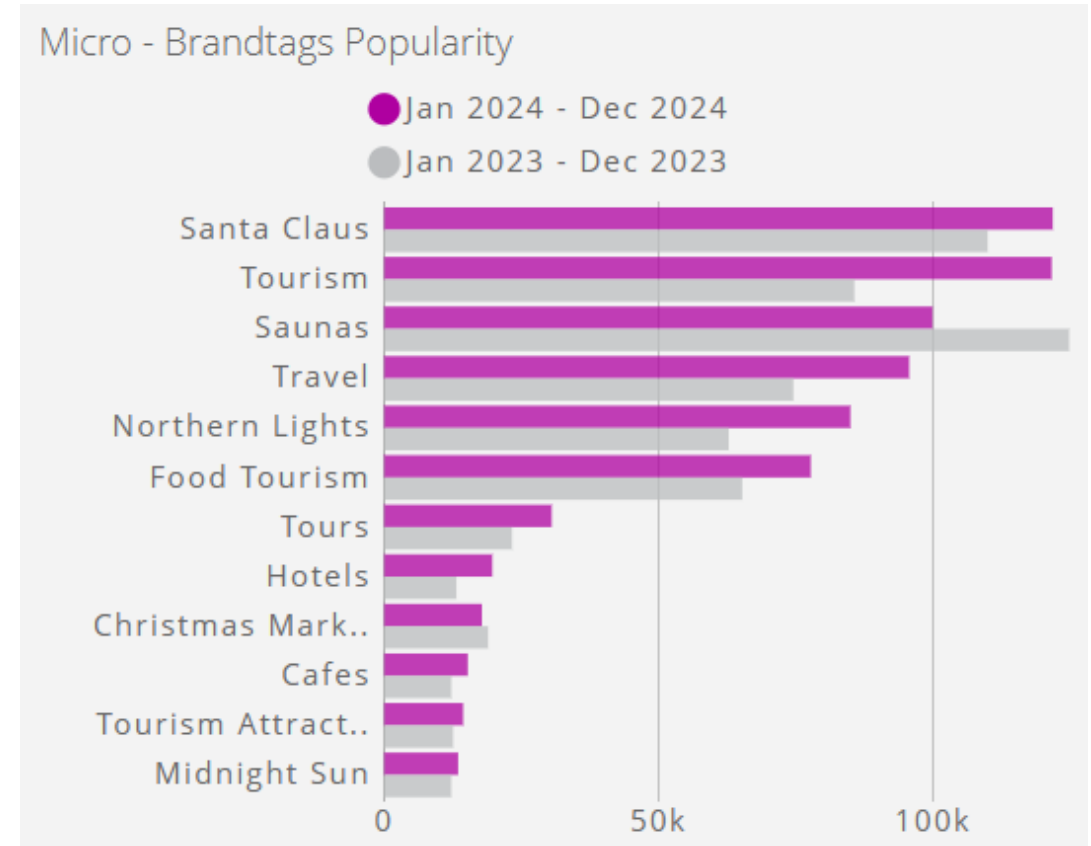
USA

Restaurants, Ice Hotels



Japan

Food Tourism, Tours, Christmas Markets, Cafes, Tourism Attraction, Midnight Sun

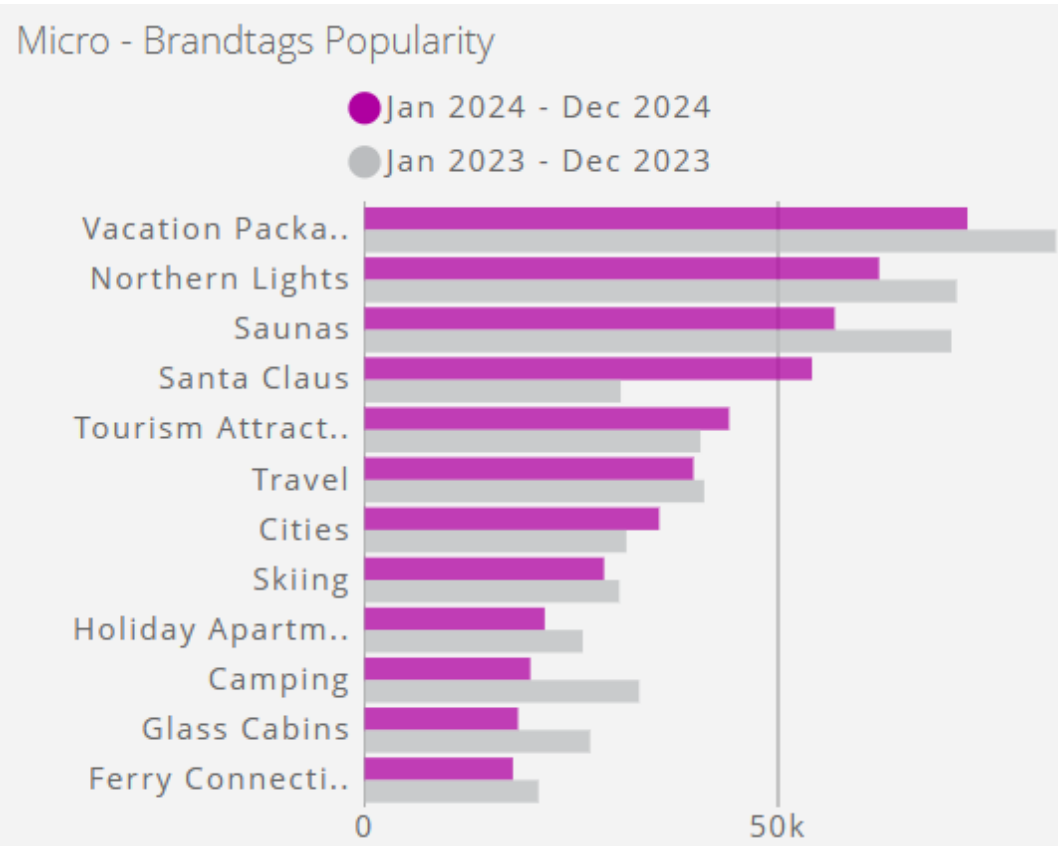


Top12 themes by source market

Differences with total int'l themes

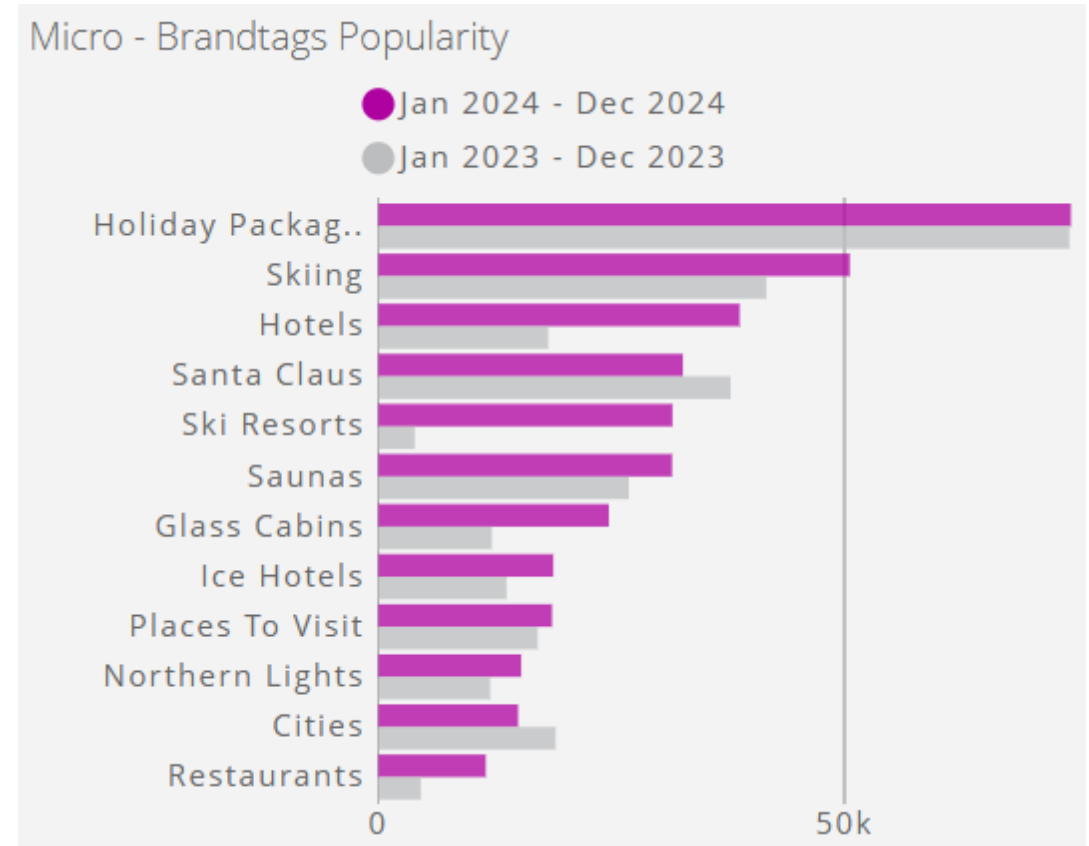
Germany

Tourism Attractions, Holiday Apartments, Camping, Ferry Connections



UK

Ski Resorts, Ice Hotels, Restaurants

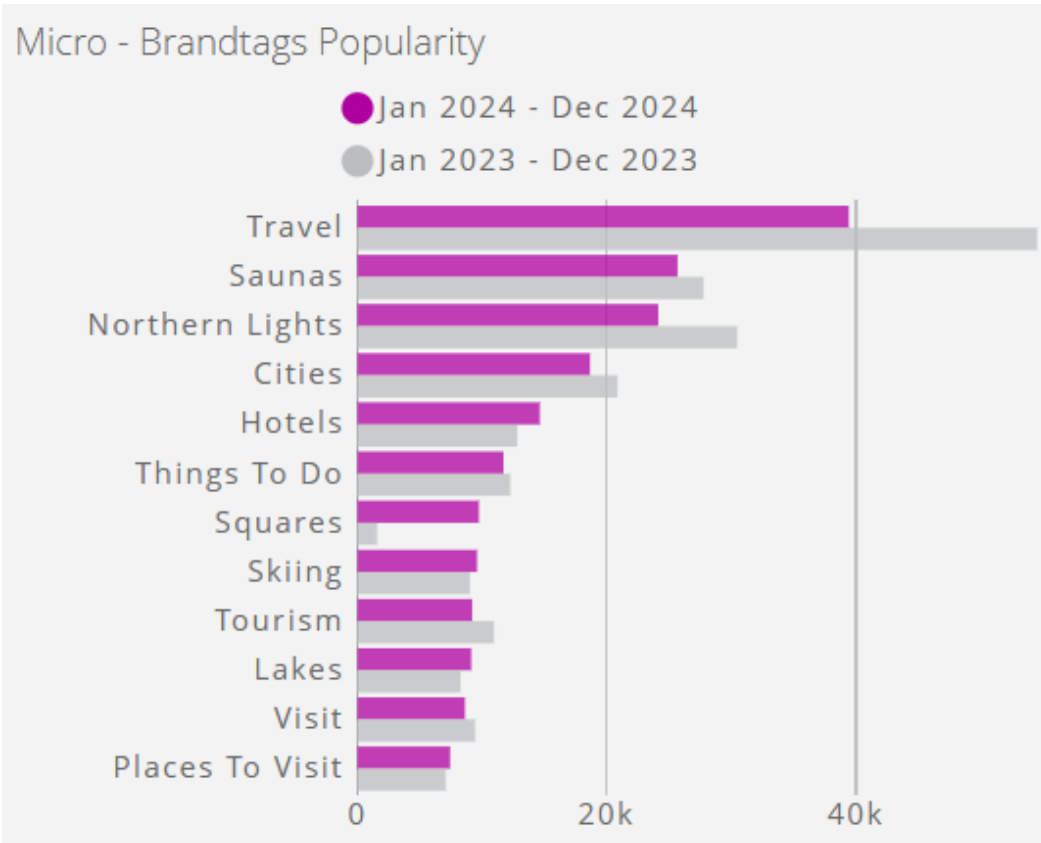


Top12 themes by source market

Differences with total int'l themes

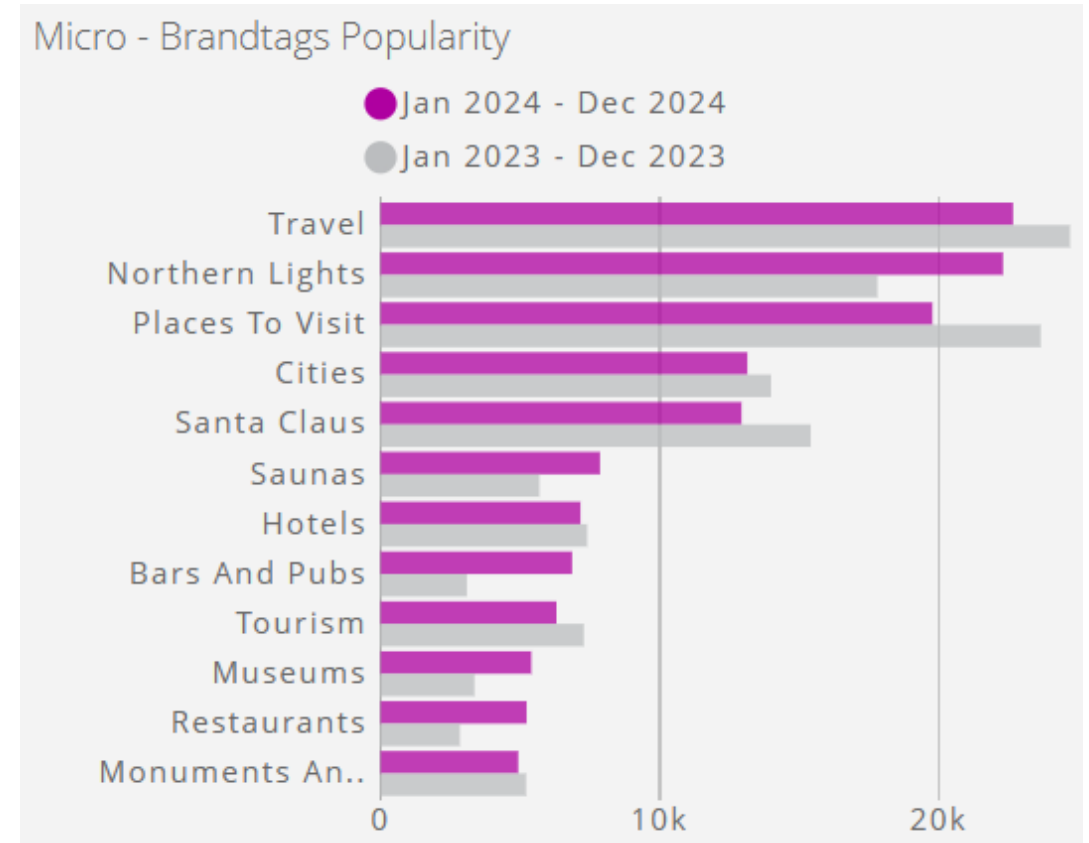
France

Things To Do, Squares, Lakes, Visit



Spain

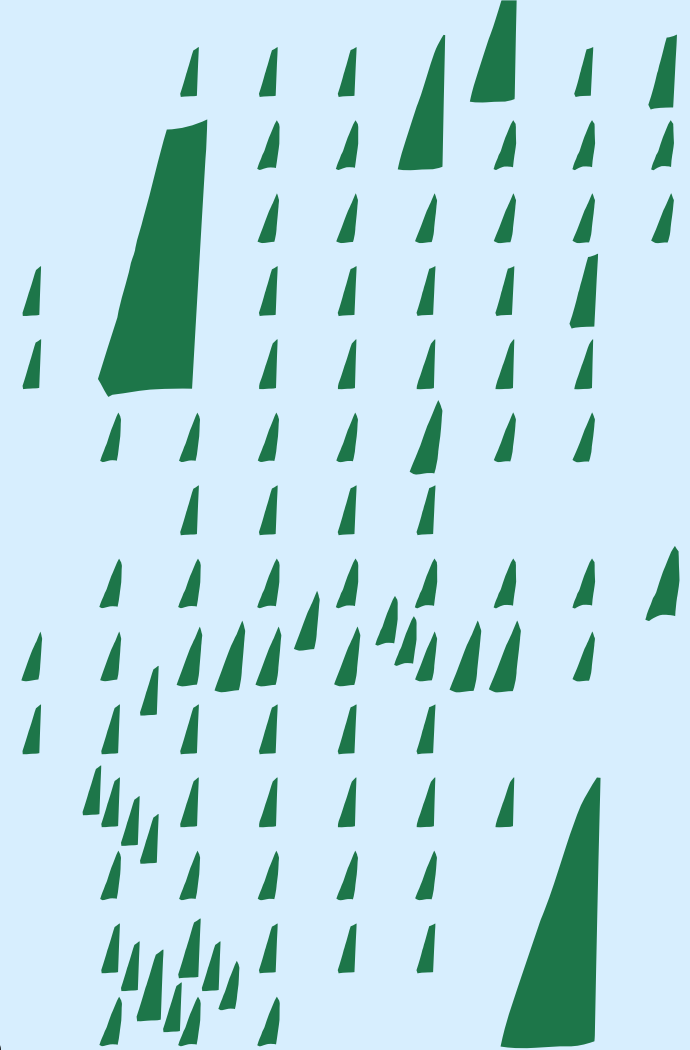
Bars And Pubs, Museums, Restaurants, Monuments And Memorials



Flight capacity and arrivals/bookings for Q1-2025

Outlook for January – March 2025

- For the **first quarter of the year**, **capacity is improving** both to **Finland** and **Norway** compared to previous year. *Seat capacity is approximately 10% below pre-pandemic levels in Finland and Norway.*
 - Capacity to Sweden is nearly on the same level than last year, *so it remains 26% below pre-pandemic level.*
- **Flight arrivals/bookings** for Q1-2025 **are growing to Finland** and **Norway** compared to the previous year *and to 2019*. Bookings to Sweden are on the same level as last year, *but 11% below those of 2019*.
 - Bookings made by the 2nd of February shows that **Norway** leads the way with over 338,000 bookings, and **Finland** comes second with nearly 319,000 bookings.
 - **Germany** is clearly the biggest source country **to Finland** and the bookings are growing both compared to previous year and to year 2019.
 - From the other biggest source markets where bookings to Finland are increasing both compared to previous year and to 2019 are **USA, Switzerland, Spain, Denmark, and Belgium**.



Seat capacity & flight bookings worldwide for Q1-2025

Seat capacity on direct flights

Jan-Mar 2025 compared to previous year (& pre-pandemic)



+14% (-10%)



-1% (-26%)



+6% (-9%)

Database update 09-Feb

Seat capacity for the beginning of the year is increasing to **Finland and to Norway** compared to previous winter, and it is also very close to the pre-pandemic level.

Flight bookings (direct & non-direct flights)

Jan-Mar 2025 compared to previous year (& pre-pandemic)



+14% (+16%)



0% (-11%)



+6% (+22%)

Database update 02-Feb

Bookings of foreign visitors for Jan-Mar have **increased strongly** both for **Finland** and **Norway**. Bookings to Sweden show positive development as well.

Direct int'l flights to Finland Jan-Mar 2025

and change in seat capacity compared to last year (& pre-pandemic)

USA

20 avg. weekly flights
(Share; %YoY & %YoYPP)
(3%; +19% & +97%)

From	To	Avg. weekly frequency
New York (JFK)	HEL	5-7
Dallas (DFW)	HEL	4-7
Miami (MIA)	HEL	2-4
Los Angeles (LAX)	HEL	2-4
Chicago (ORD)*	HEL	7

*) starting 25-Mar

Asia

93 avg. weekly flights
(Share; %YoY & %YoYPP)
(13%; +9% & -33%)

From	To	Average weekly frequency
Bangkok (BKK)	HEL	13-14
Tokyo (HND)	HEL	9-10
Phuket (HKT)	HEL	7-9
Singapore (SIN)	HEL	7
Doha (DOH)	HEL	7
Delhi (DEL)	HEL	5-7
Seoul (ICN)	HEL	6-7
Hong Kong (HKG)	HEL	5-8
Dubai (DXB)	HEL	6-7
Shanghai (PVG)	HEL	5-6
Osaka (KIX)	HEL	2-3
Tokyo (NRT)	HEL	1-3
Hurghada (HRG)	HEL	2-3
Zhengzhou (CGO)	HEL	1
Krabi (KBV)	HEL	0-1

& Nagoya starting 31-Mar

Europe

1,181 avg. weekly flights
(Share; %YoY & %YoYPP)
(84%; +14% & -6%)

Total seat capacity to Finland for Q1-2025

2.5 M

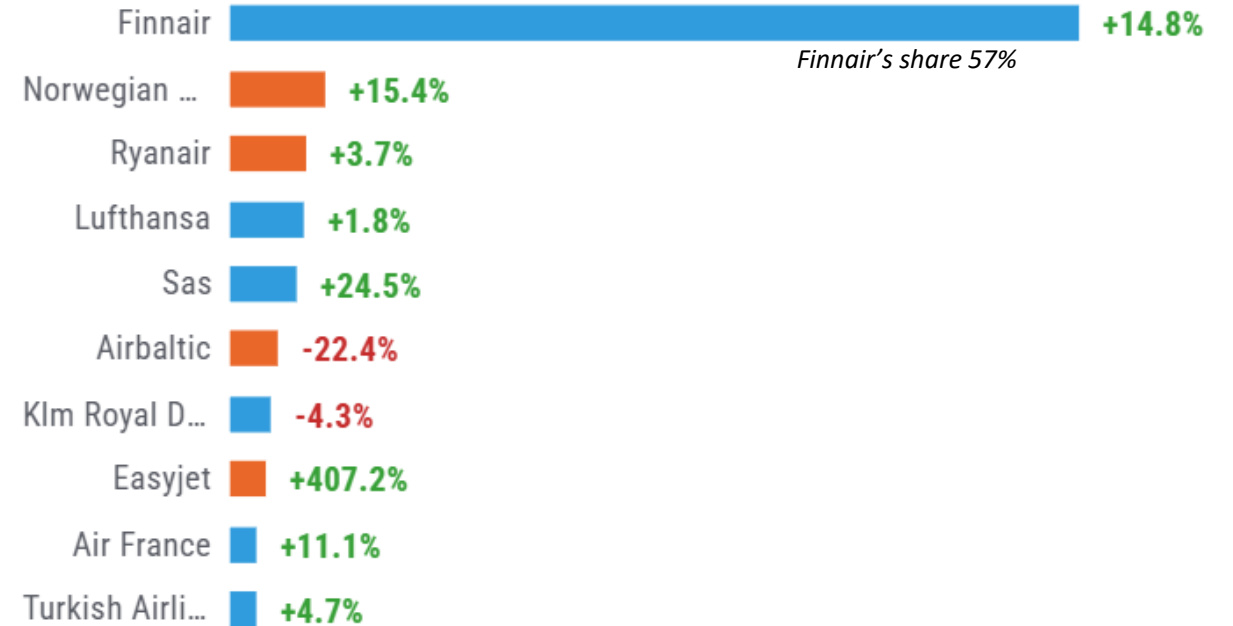
+14% vs. Q1-2024 & -10% vs. Q1-2019

EUROPE to Finland / Q1-2025

From (selected countries)	Share	Seat capacity compared to 2023	Seat capacity compared to 2019
Germany	15%	+13%	+1%
Sweden	11%	+5%	-31%
Spain	11%	+8%	-18%
UK	10%	+34%	+8%
France	6%	+42%	+36%
Netherlands	5%	-10%	+10%
Denmark	5%	+27%	-26%
Italy	4%	+3%	+37%
Latvia	4%	+9%	+51%
Norway	4%	+8%	-13%
Poland	3%	+45%	+16%
Switzerland	3%	+25%	+27%
Estonia	3%	+6%	+45%
Turkiye	3%	+17%	+93%
Belgium	3%	+26%	+38%
Austria	2%	-5%	+22%

Top10 airlines operating
from Europe to Finland

+13.9%
YOY for selected airlines



Follow up on flight arrivals/bookings* to Finland for January – March 2025

compared to previous year & (pre-pandemic)

