Visit Finland

VF monthly follow-up

August & summer season 2025

Summary

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

- **Border survey – leisure up, business down:** In the latest Sep 2024–Aug 2025 period, foreign travellers made **5.0 million** trips to Finland (**+6%** YoY) with total spending of **€3.7 billion** remaining steady compared to the previous 12 months. Leisure travel dominates (**76%** of visits) and grew robustly (**+12%** in trips, **+9%** in spend). In contrast, business travel (24% of trips) declined **–10%** in trip volume, with spending falling **–23%**. Notably, **holiday** tourism and **conference/fair** trips increased.

- **Vacation travel drove tourism growth in summer:** Summer 2025 recorded **increasing leisure visits** (+10%) and spending (+5%) vs summer 2024. **Holiday travellers** made up **56% of all visits** to Finland during the summer season. Holiday travellers drove tourism growth, with an **increase of 15% in visits** and **16% in spending** compared to previous summer.
    - The biggest volumes in holiday travel to Finland came from **Estonia** and **Germany**, and vacation trips from these countries also **increased** clearly compared to previous summer. Among the biggest source markets, **Italy** had a **strong growth** also in summer holiday travel to Finland.
    - **The highest total spending among holiday travellers** was recorded for visitors from **Germany** and the **US**. In terms of spending per trip, the leading countries were the **Netherlands** and **China.** Additionally, **China** together with **Japan**, **Spain** and the **UK** topped the list for spending per day, and their daily spending also increased from previous summer.

Summary

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

- **Foreign registered overnights nearing full recovery:** In Jan–Aug 2025 **4.8 million** foreign overnight stays (**+13%** YoY) were recorded in Finland, just **1% below** 2019 (ex-Russia, **+12% above** 2019). **August 2025** alone saw **757,800** foreign nights (**+13%** YoY, only **–4%** vs Aug 2019) – indicating a return to pre-pandemic levels.
- **Registered overnight stays rising during summer season: 2.1 million** foreign overnight stays were recorded in June-August 2025 (**+12%** YoY), only **6%** below summer 2019 levels.
  - **Major markets outperform also pre-pandemic levels:** Key Western markets exceeded 2019 volumes. **Germany** (largest market) in summer 2025 nights **+12%** YoY, **+4%** vs 2019. **USA +12%** YoY, a massive **+61%** vs 2019 – now among top 3 source markets. **UK +26%** YoY, **+21%** vs 2019. **Italy**, **France**, **Switzerland**, **Poland**, **Austria**, **Belgium**, and **Canada** marking two-digit growth vs 2019 levels. *(Only Sweden and Asian markets remain below 2019: e.g. Sweden –5%, China –50%, Japan –13%, and India –17% vs 2019).*
  - **Record summer in Helsinki, strong regional gains:** Over **1.15 M** foreign nights in Helsinki region in summer 2025 (**+17%** YoY, **+10%** vs 2019) – the highest ever. **Lapland** summer nights **+12%** YoY (just 5% below 2019), and **Lakeland** saw **+20%** YoY growth (though still −31% vs 2019). **Coastal areas** lagged (−6% YoY, as Swedish travel has not fully rebounded).

Summary

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

- The **Nordic region:** Experienced **good growth** in **registered foreign overnight stays** also in summer2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the summer foreign overnights remained still very small, **8%** (Sweden leading with a 35% share).
    - **Germany** was clearly the biggest source market, and their overnights have increased in each of the four Nordic countries.
    - Beside Germany, summer overnights increased to each Nordic country from **the US**, **the Netherlands**, **Denmark**, **Switzerland**, **France**, **Finland**, **Poland**, **Belgium**, and **China** among the main source markets.

- **Winter 2025–26 outlook:** The upcoming high winter season is expected to see further recovery in inbound travel. International **seat capacity** to Finland in Dec 2025–Feb 2026 is projected **+7%** higher than last winter (almost back to 2019 levels). **Flight arrivals** to Finland are forecasted to increase by **+8%** vs winter 2024-2025 (helped by improved connectivity to Helsinki and airports in Lapland region). Several key origin markets are expected to grow compared to both previous winter *and winter 2019*, reflecting a robust rebound in demand. The strong air capacity from the US and Europe is poised to offset slower Asian recovery, pointing to another **positive winter tourism season for Finland**.

Foreign Trips to Finland & Spending & Carbon efficiency, Registered overnights

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

	Trips to Finland	Spending in Finland	Carbon efficiency	Registered overnights
Monthly view	**595,000** *+6%* Aug/25 trips to FIN	**380M€** *-2%* Aug/25 total spend in FIN	**1.1** - Aug/25 €/CO2	**757,800** *+13% (-4%)* Aug/25 foreign reg. overnights in FIN
Year to date	**3.5M** *+4%* Jan-Aug 2025 trips to FIN	**2.5Mrd€** *-1%* Jan-Aug 2025 total spend in FIN	**1.1** *-0.1* Jan-Aug 2025 €/CO2	**4.8M** *+13% (-1%)* Jan-Aug 2025 foreign reg. overnights in FIN

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Sources: Matkailijamittari/Border Survey, Accommodation Statistics, Visit Finland Statistics Service Rudolf, Statistics Finland

Int’l Flight Bookings & Seat Capacity to Finland

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

	Flight arrivals / outlook for arrivals*		Seat capacity	
Monthly historical & forecast view	**83,300** -2% (-27%) **Sep/25 int’l flight arrivals to FIN**	**85,900** +3% (-12%) Oct/25 outlook for int’l flight arrivals to FIN	**973,400** +5% (-18%) **Aug/25 flight seat capacity to FIN**	**921,800** +3% (-16%) Sep/25 outlook for seat capacity to FIN
6 months’ historical & forecast view	**566,100** -6% (-14%) **04-09/25** (6 mths) **arrivals to FIN**	**812,200** +6% (-4%) 10/25-03/26 (6 mths) outlook for flight arrivals to FIN	**5.5M** +5% (-14%) **04-09/25** (6 mths) **flight seat capacity to FIN**	**5.4M** +5% (-13%) 10/25-03/26 (6 mths) outlook for seat capacity to FIN

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

Source: ForwardKeys Destination Gateway

Border Survey

Latest 12 months (Sep/2024 – Aug/2025)

Foreign visitors made **5 million trips to Finland**, marking a **6% rise** compared to the period from Sep/2023 to Aug/2024. **Total expenditure in Finland** reached **3.7 billion** euros, **remaining steady** compared to the previous 12 months.

- **Leisure travel** accounted for **76%** of all trips, with a **12% increase in trip numbers** and a **9% growth in spending** by leisure travellers.
- **Work-related trips** represented **24%** of all trips but **declined by 10%**, with **business traveller spending falling by 23%**.

More than half of all visitors were on **holiday trips**, while **19%** came to **visit friends or relatives**. **Holiday travel grew** compared to the prior period, whereas **visits to friends and relatives dropped**. Overall, business travel decreased except for **conference, congress, or trade fair attendees, whose trips rose by 10%**.

Daily spending by **holiday travellers** increased by 4%, averaging **131 euros** per day. Among business travellers, those **attending conferences, congresses, or trade fairs** had the highest daily spend at **132 euros**, though this was 23% lower than in the previous 12-month period.

Border Survey / latest 12 months (Sep/2024 – Aug/2025)

- **5.0 million** visitors (YoY **+6%**)
  - 90% overnight trips
- Spending **3.7 billion€** (YoY 0%)
  - 738 € / trip (YoY -6%)
  - 81 € / day (YoY **+5%**)
- **76%** travelling for **leisure** (leisure trips **+12%** & spending **+9%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.2** months)
- Median length of stay **4 nights** (YoY no change)

Link to the report:
Matkailijamittari - Visit Finland

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Border Survey / Latest 12 months (Sep 2024 – Aug 2025)

Foreign visitors in Finland

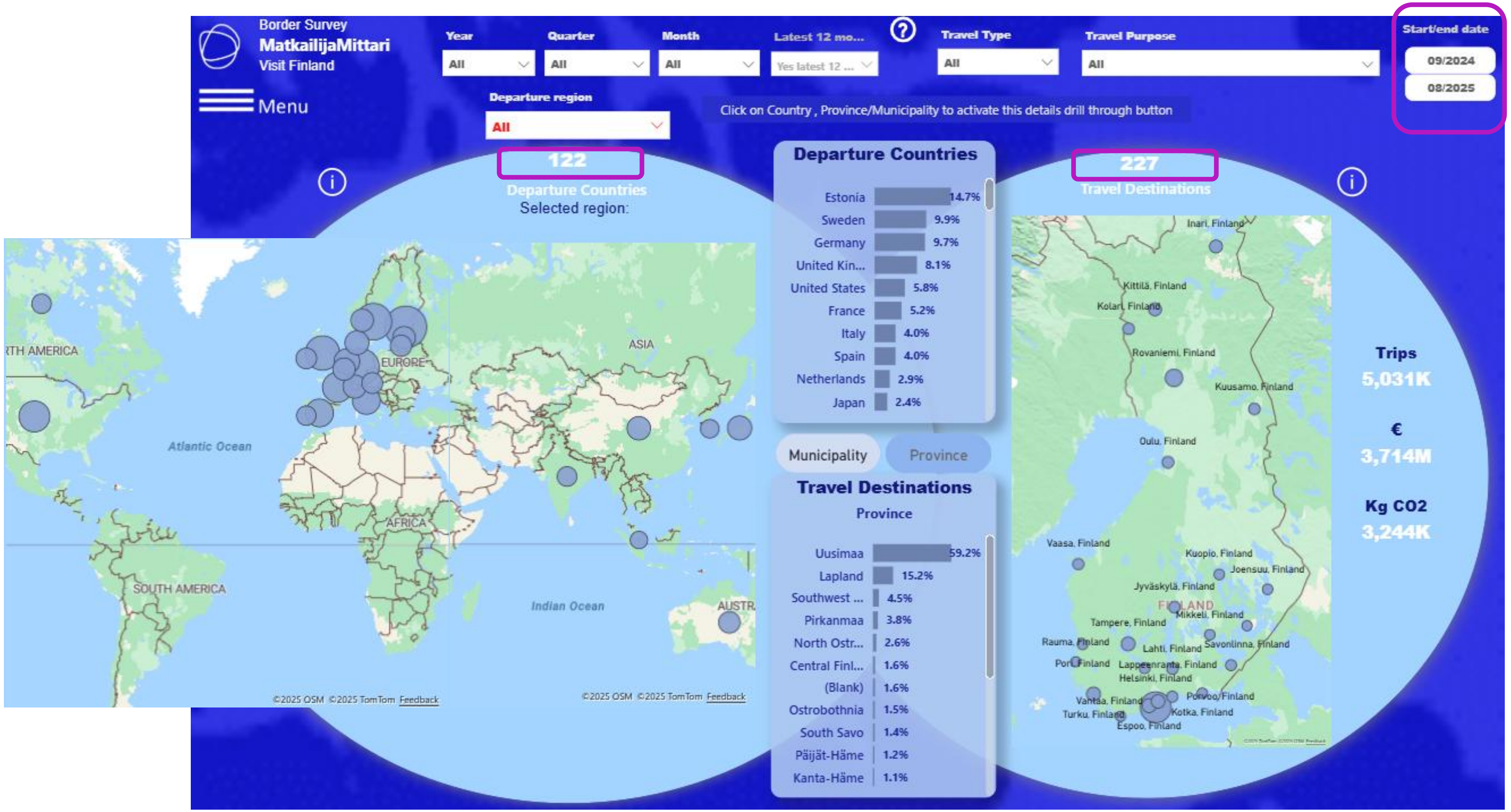
[Link to the report: Matkailijamittari - Visit Finland]

Top5 source markets for **<u>leisure/personal trips</u>**

- Estonia
- Germany
- Sweden
- UK
- USA

Top5 source markets for **<u>work related trips</u>**

- **Estonia**
- Sweden
- Germany
- UK
- Italy/Latvia/ France



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Border Survey

Summer season (Jun-Aug) 2025

The number of **trips increased by 6%**, but **total spending** by the visitors saw a **slight decrease** compared to summer 2024.

- **Vacation travel** saw a **15% rise**, with holidaymakers boosting their **total expenditures by 16%**.
- **Business travel fell by** 12%, accompanied by a 22% **reduction in business-related spending**. Nevertheless, **trips to conferences, congresses, and fairs grew by 11%**, even though **attendee spending was** 7% **lower** than the previous summer.

The **largest groups of visitors** originated from **Estonia**, **Sweden**, **Germany**, the **US**, and the **UK**.

The biggest contributors to the **total spending** during the summer season were visitors originating from **Germany**, **Estonia**, the **US**, and **Sweden**.

Leisure travel increased, business travel decreased in summer 2025

Total	Trips	Prev yr	% Trips change	Eur Total	Prev yr	€ change %
	1,643K	1,556K	5.6	1,000M	1,020M	-2.0

- **Leisure travel** to Finland **increased by 10%** during summer season 2025. Visitors travelling for leisure purposes also **spent 5% more** in Finland compared to previous summer.
- On the other hand, **business travel decreased** at the same time by **12%** and the **total spend** by business travellers **decreased** as much as **22%** compared to summer 2024.

Leisure travellers

Trips	Prev yr	Trips change
1,358K	1,234K	**+10%**

€ Total	Prev yr	€ change
794M	758M	**+5%**

Business travellers

Trips	Prev yr	Trips change
280K	317K	-12%

€ Total	Prev yr	€ change
201M	258M	-22%

Link to the report:
Matkailijamittari - Visit Finland

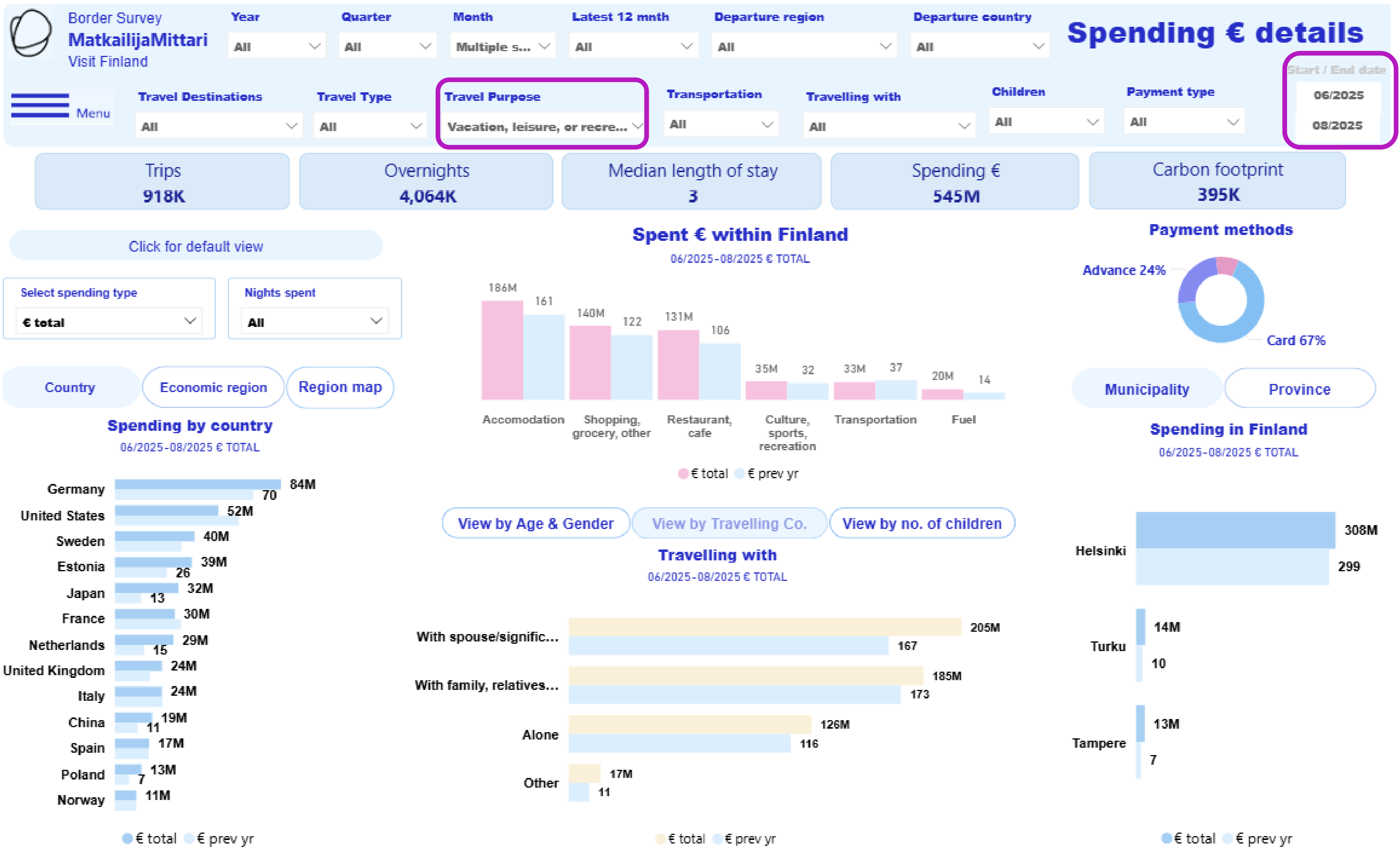
Spend by vacation travellers in Finland during summer 2025

Jun-Aug 2025 compared to Jun-Aug 2024

- The highest **total spending** among vacation travelers was recorded for visitors from **Germany** and **the US**. In terms of spending per trip, the leading countries were **the Netherlands** and **China**, while **China** and **Japan** topped the list for **spending per day**.

- **Helsinki** emerged as the most frequented destination, receiving the largest portion of total holidaymaker expenditure.

- During the **summer**, **34%** of holidaymakers' total spending was allocated to **accommodation**. Both **shopping** (including groceries) and **restaurants and cafes** accounted for approximately **25%** each of the overall expenditure.



Link to the report:
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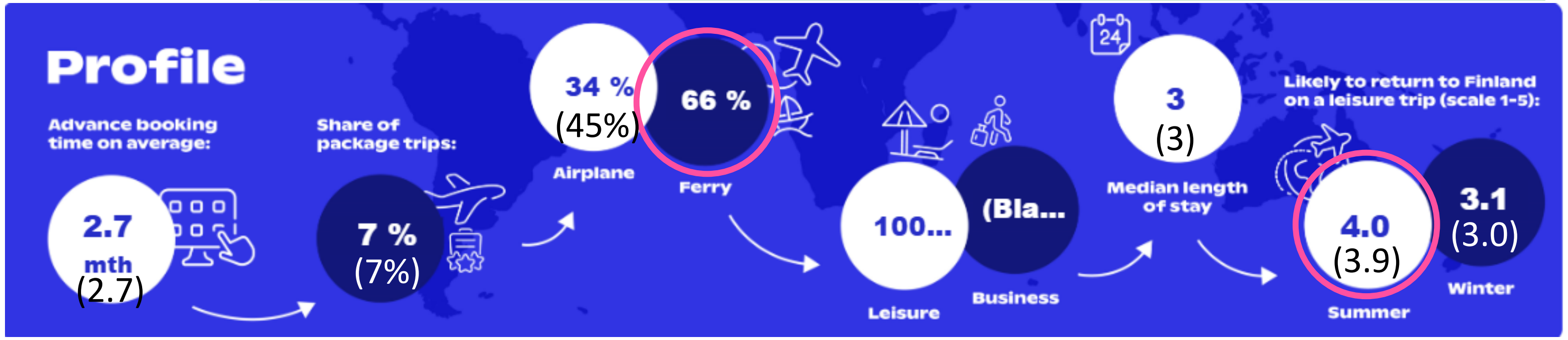
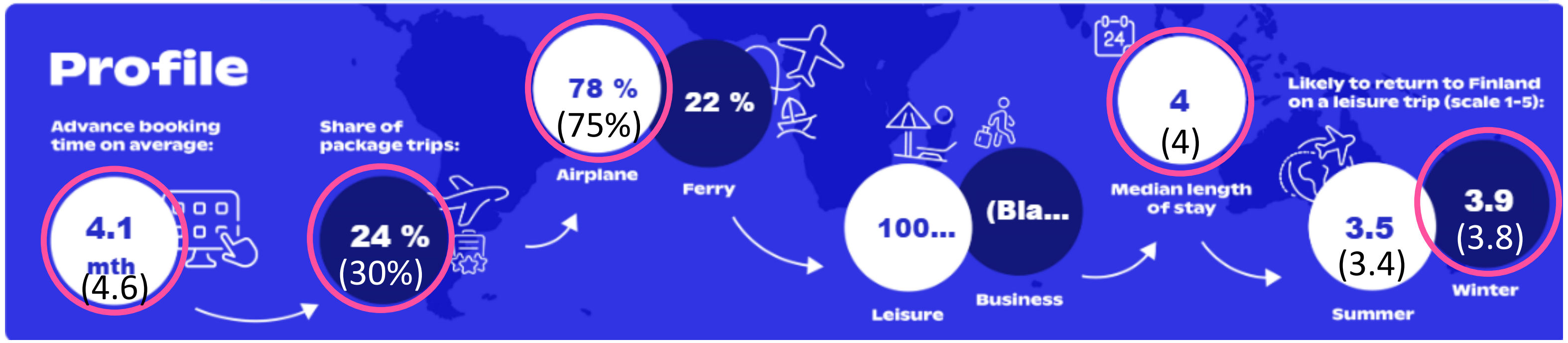
Comparison of vacation travel in summer 2025 and winter 2024/25

- **Vacation and recreational travelers** took **22% more trips** to Finland in the summer season of 2025 compared to the winter season of 2024/25.
- Despite the significantly higher number of visitors in summer, the **total spending** by visitors was **36% lower** than during the winter season. The **average expenditure per trip and per day** in summer was approximately **half of the amounts** recorded in winter.
- Nonetheless, **vacation travel** has been growing in both summer and winter, leading to an **increase in the total spending by holiday travelers** as well.

Summer 2025 (Jun-Aug)	Trips	Total €	€ / trip	€ / day	CO2 efficiency
	918K	545 M€	594 €	96 €	1.4
	+15% YoY	+16% YoY	+1% YoY	-2% YoY	+0.1



Winter 2024/25 (Dec-Feb)	Trips	Total €	€ / trip	€ / day	CO2 efficiency
	753K	851 M€	1,130 €	199 €	1.4
	+23% YoY	+28% YoY	+4% YoY	16% YoY	+0.1



Vacation travellers' trips & Spending by top5 markets summer vs. winter 2025

Summer high season (Jun – Aug 2025): Vacation/recreation travellers in Finland

Country	Vacation Trips	YoY trips change %
Estonia	**121,000**	**+23%**
Germany	**105,000**	**+10%**
Sweden	88,000	-5%
USA	67,000	-1%
Italy	47,000	**+19%**

Country	M€ total	YoY € change %
Germany	**83.6**	**+20%**
USA	52.1	-17%
Sweden	40.0	**+19%**
Estonia	38.8	**+48%**
Japan	32.0	**+142%**

Country	€ / trip	YoY € / trip change %
Netherlands	**1,040**	**+46%**
China	**1,019**	**+12%**
Germany	**799**	**+9%**
USA	778	-16%
France	753	-3%

Country	€ / day	YoY € / day change %
China	**197**	**+9%**
Japan	**160**	**+2%**
Spain	**138**	**+13%**
UK	**122**	**+62%**
USA	113	-10%

Winter high season (Dec 2024 – Feb 2025): Vacation/recreation travellers in Finland

Country	Vacation Trips	YoY trips change %
UK	**135,000**	0%
France	**88,000**	**+54%**
Germany	**76,000**	**+11%**
Estonia	39,000	**+17%**
Spain	39,000	**+61%**

Country	M€ total	YoY € change %
UK	**124.8**	**+1%**
France	**123.8**	**+66%**
Germany	**99.2**	**+43%**
Spain	54.2	**+91%**
USA	49.0	**+3%**

Country	€ / trip	YoY € / trip change %
Australia	**1,791**	-22%
France	**1,412**	**+8%**
Spain	**1,403**	**+19%**
USA	1,402	-28%
Germany	1,313	**+29%**

Country	€ / day	YoY € / day change %
Australia	**256**	**+5%**
Spain	**245**	**+11%**
France	**225**	**+28%**
Ireland	**217**	**+18%**
UK	209	**+9%**

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Link to the report:
Matkailijamittari - Visit Finland

Please be aware that the report covers only countries with a minimum of 30 respondents.

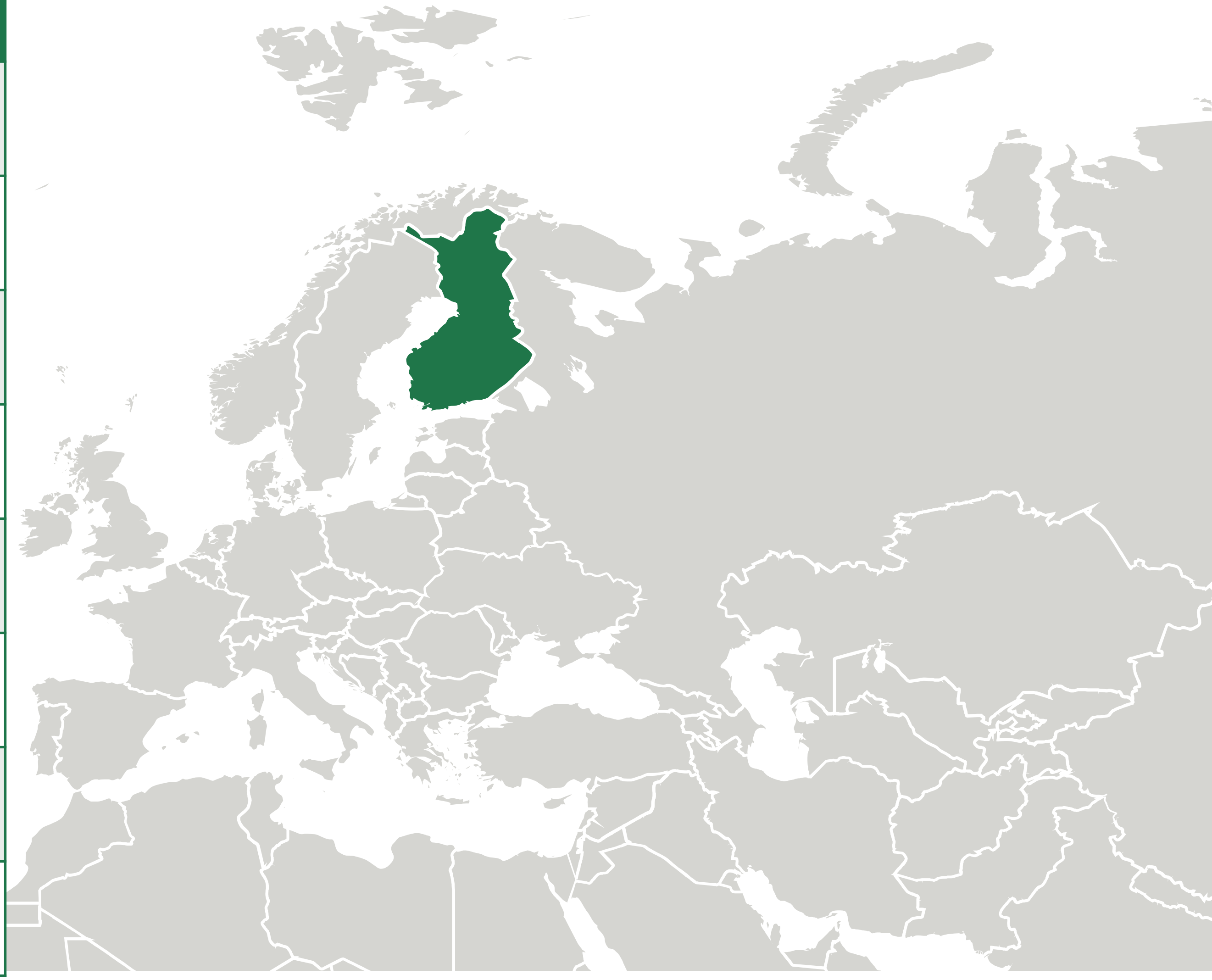
Registered Overnights

- **Jan-Aug 2025**
  - The number of registered foreign overnights reached **4.8 million**, marking an **13%** increase from the previous year.
  - The leading source markets were **Germany**, **Sweden**, **USA**, **France**, **UK**, and **the Netherlands**.
  - Overall accommodation revenue increased by **5%**, with **foreign revenue rising** by **18%** and domestic revenue decreasing by 1% compared to the same period last year. **Foreign revenue accounted for 36%** of the total accommodation revenue, while **foreign overnights accounted for 30%** of total overnights.

- **August 2025**
  - Total foreign overnights reached **757,800** in August (**+13%** YoY, *& -4% compared to August 2019*).
  - Leading source market in August was **Germany**, followed by **Sweden**, the **US**, **Italy**, and the **UK**.
  - **47%** of registered foreign overnights took place in **Helsinki**, and the number of overnights marked a **new record for August** with 357,300 foreign overnight stays.
    - ➢ Biggest source market for Helsinki were **USA** with 39,700 overnights (+22% YoY) and **Germany** with 39,400 overnights (+20% YoY). Overnights increased in Helsinki also from all the main source markets compared to previous year.

Registered overnights January – August 2025

	Jan-Aug 2025	Change-% vs. Jan-Aug **2024**	*Change-% vs. Jan-Aug 2019*
Total	**16.2M**	**+2%**	*0%*
Domestic	**11.4M**	**-2%**	*0%*
Foreign, total	**4.8M**	**+13%**	*-1%*
Foreign excl. Russia	**4.8M**	**+13%**	*+12%*
Scandinavia	640,000	**+4%**	*-2%*
EU-27 + UK	**3.0M**	**+10%**	*+16%*
Asia	677,500	**+34%**	*-13%*
America	453,000	**+16%**	*+47%*



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Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Main source markets

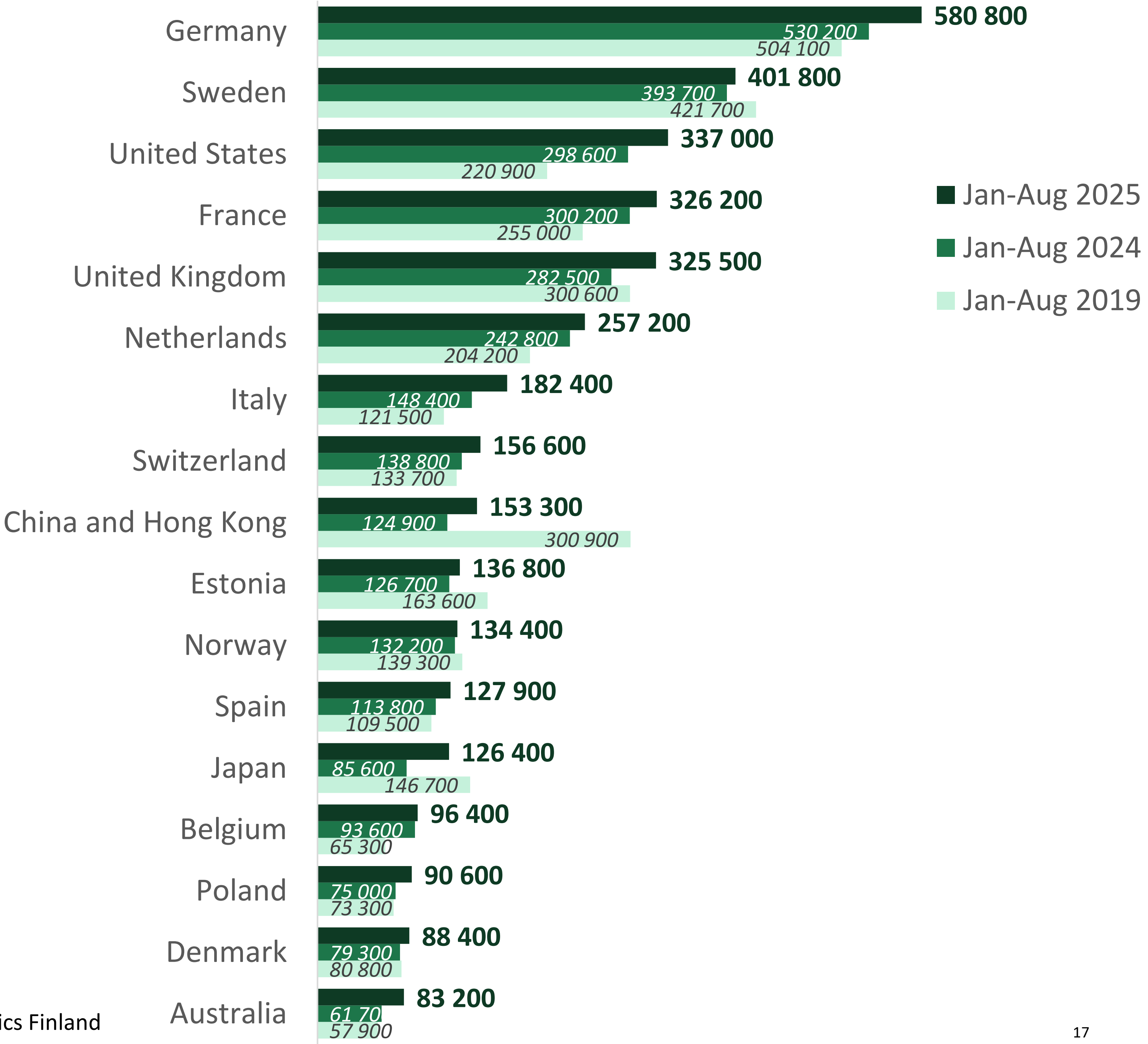
January – August 2025

vs. Jan-Aug 2024 & *Jan-Aug 2019*

Between January and August 2025, **Germany** remained clearly the top source market for **registered overnights**. Other significant source markets included **Sweden**, **USA**, **France**, **the UK**, and **the Netherlands**.

Overnight stays from **all major source markets exceeded** the totals recorded in the previous year.

Compared to January-August 2019, overnight stays from Sweden (-5%), China including Hong Kong (-49%), Estonia (-16%), Norway (-4%), and Japan (-14%) still lagged behind pre-pandemic levels.



Visit Finland Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered foreign overnights increased by 13% in August

August 2025

757,800 total foreign overnights;
+13% vs. 08/2024, *(-4% vs. 08/2019)*

776,000 foreign excl. Russia; **+13%**, *(+10%)*

488,400 EU+UK; **+14%**, *(+17%)*

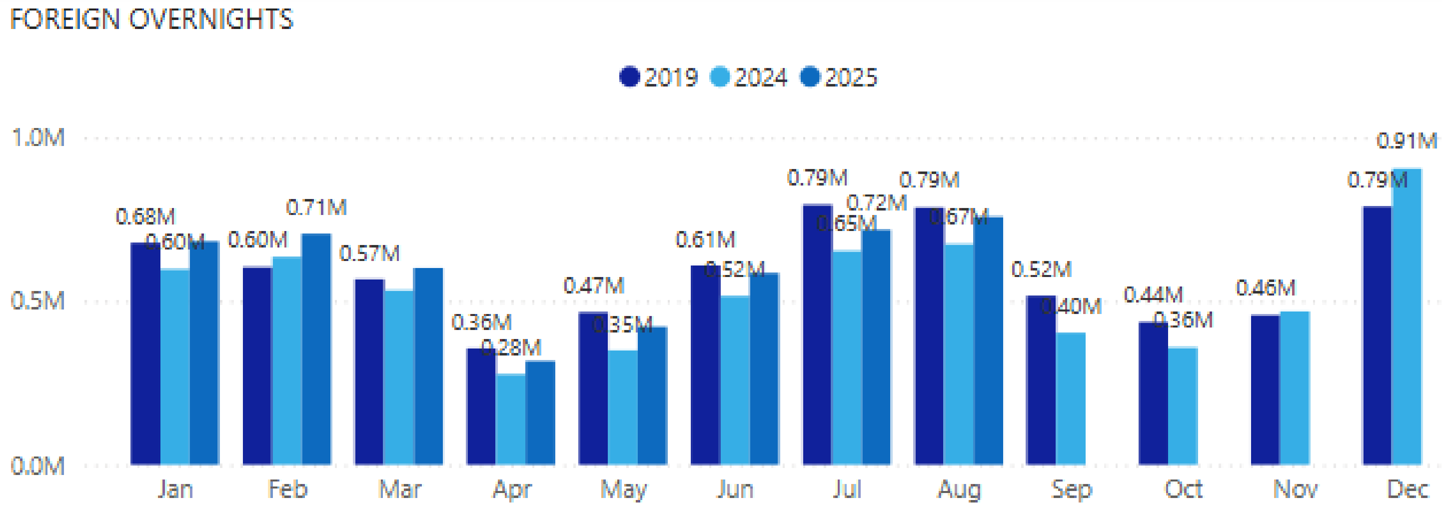
107,100 Scandinavia; **+3%**, *(+2%)*

96,000 Asia; **+19%**, *(-30%)*

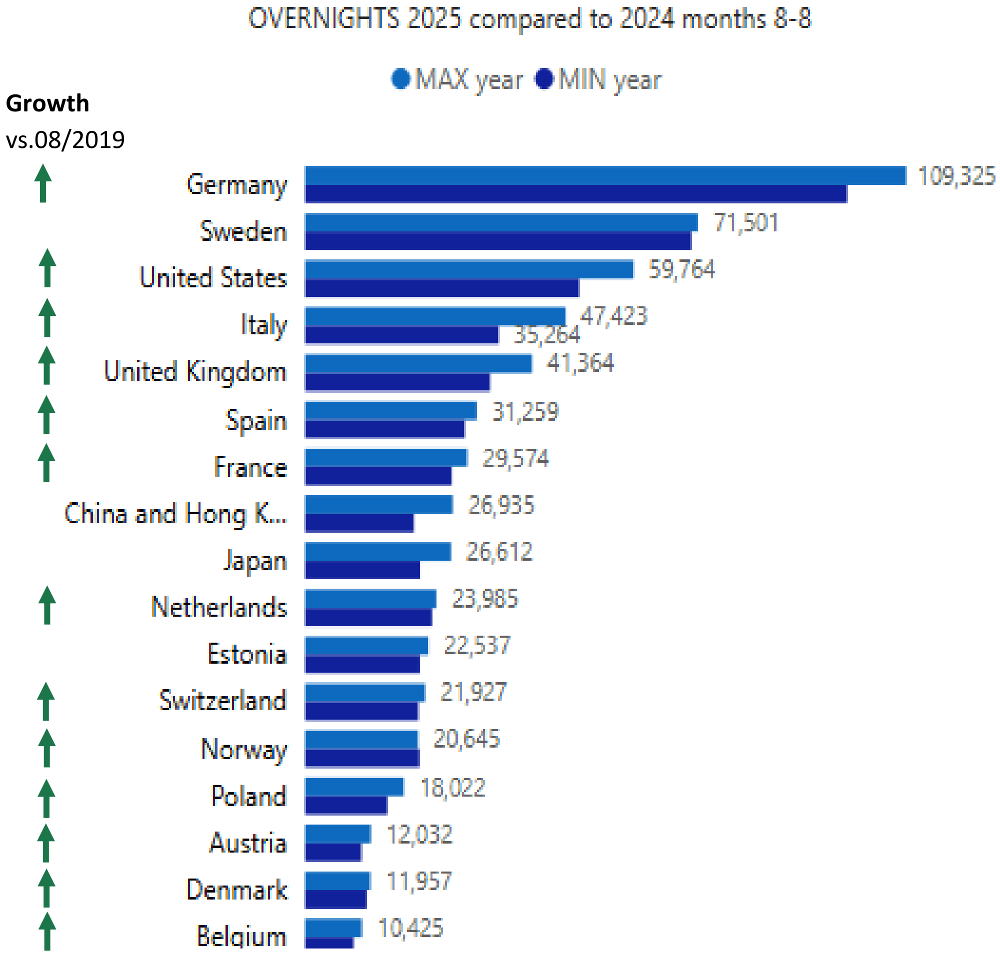
78,000 America; **+17%**, *(+51%)*

Top destinations for total foreign;
vs. 08/2024, *(vs. 08/2019)*

- **357,300 Helsinki**; **+18%**, *(+13%)*
- 57,200 Vantaa; **+35%**, *(+14%)*
- 35,300 Tampere; **+35%**, *(+76%)*
- 24,300 Rovaniemi; **+20%**, *(+20%)*
- 23,100 Espoo; **+28%**, *(+2%)*
- 21,900 Turku; **-24%**, *(-17%)*
- 16,300 Mariehamn; **+1%**, *(-10%)*
- 15,000 Inari-Saariselkä; **+16%,** *(+10%)*
- 11,800 Savonlinna; **+10%**, *(-35%)*
- 11,800 Oulu; **-22%**, *(-2%)*
- 10,800 Vaasa; **+36%**, *(+30%)*



Top source markets, total foreign; vs. 08/2025



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Monthly accommodation statistics report

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

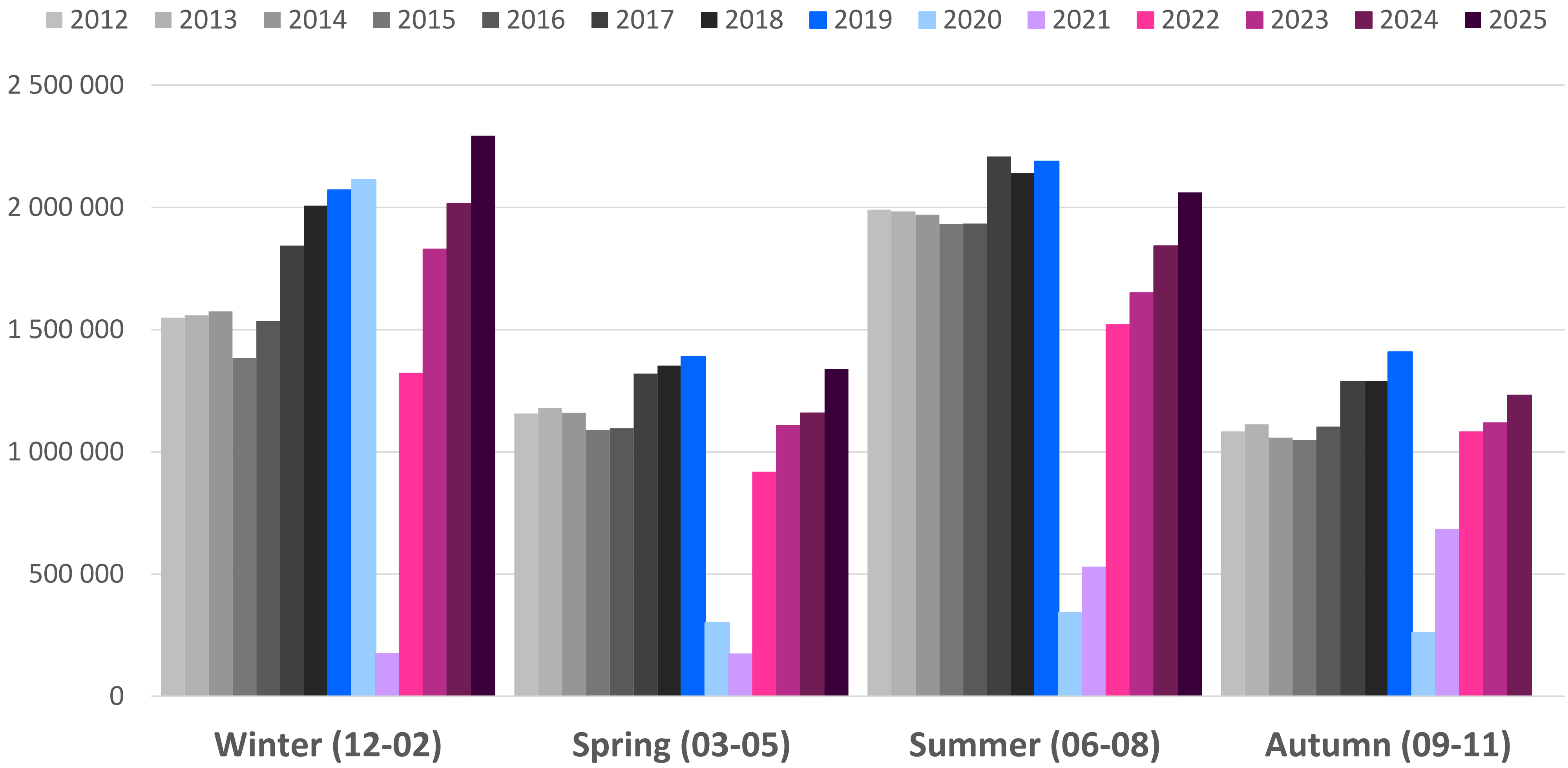
Registered foreign overnights

High summer season 2025

Foreign overnights **increased** by **12%** compared to previous summer. *Gap to summer 2019 is gradually getting smaller – this summer the number of foreign overnights stayed **only 6% below** the level of pre-pandemic*. The biggest source markets during June – August 2025 were **Germany**, **Sweden**, and the **US**.

- **Over half** of the foreign overnights took place in **Helsinki region**, where summer overnights marked **new record** - **increase** to previous summer was **17%** and *10% compared to summer 2019*.
- Foreign overnights **increased** by **20%** in **Lakeland**. *However, the gap to summer 2019 is still -31%*.
  - Top destinations: **Tampere** (+25% YoY), **Savonlinna** (+13%), **Jyväskylä** (+12%), **Kuopio** (+71%).
  - Main source market: **Germany** (+3% YoY)
- **Lapland region** experienced a **12% rise** in foreign overnights compared to summer 2024 (*-5% vs. 2019*).
  - Top destinations: **Rovaniemi** (+21% YoY), **Inari-Saariselkä** (+4%), **Kittilä-Levi** (+13%), **Ruka-Kuusamo** (+5%).
  - Main source market: **Germany** (+16% YoY)
- In **the Coast & Archipelago region** foreign overnights **decreased** by **6%** compared to previous summer *(-18% vs. 2019)*.
  - Top destinations: **Åland** (-10% YoY), **Turku** (-9%), **Oulu** (-13%), **Vaasa** (+25%).
  - Main source market: **Sweden** (-3% YoY)

Foreign seasonal overnights in Finland 2012-2025

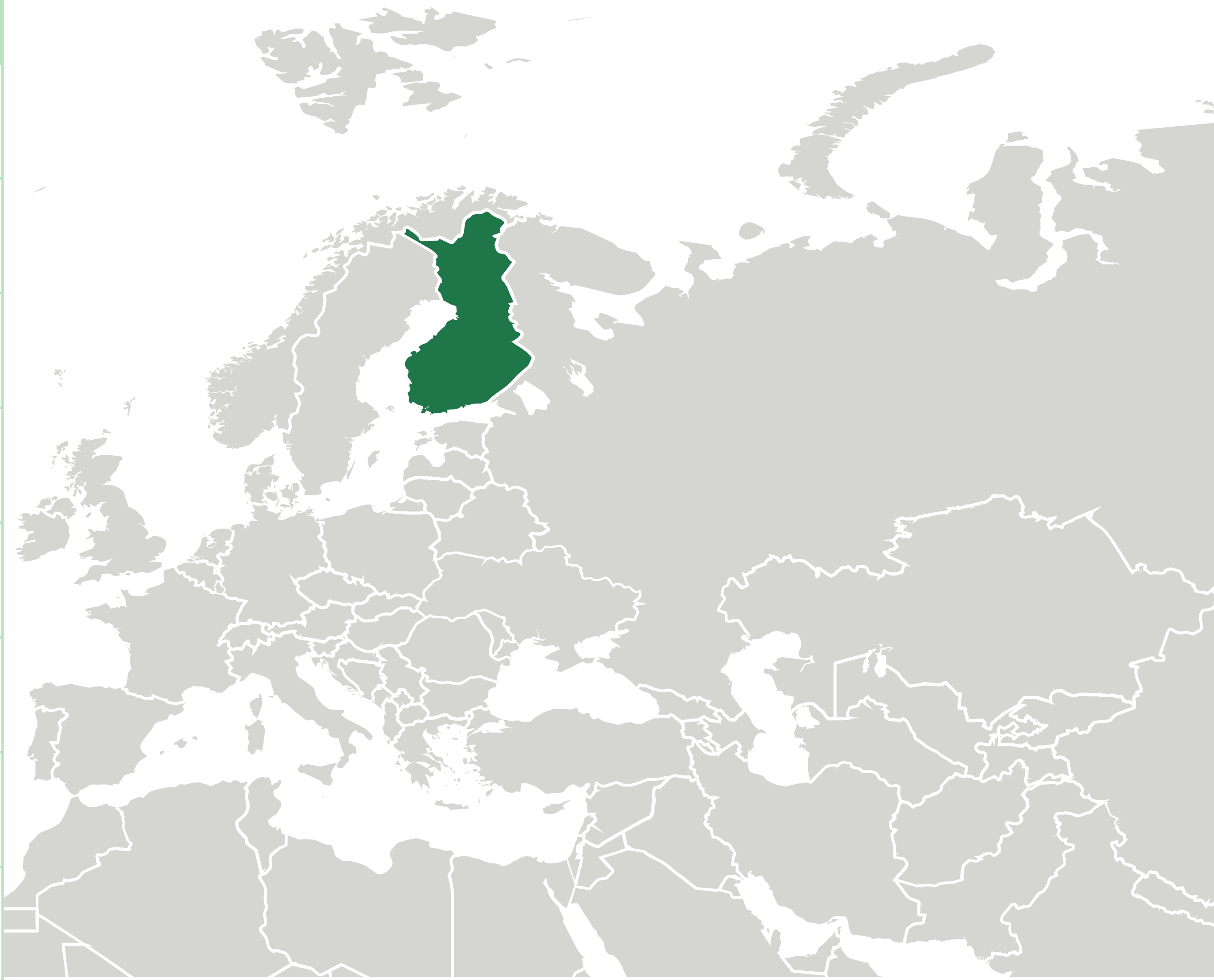


	Winter (12-02)	Spring (03-05)	Summer (06-08)	Autumn (09-11)
2025 YoY change	**+14%**	**+16%**	**+12%**	**-**
Change pre-pandemic	*+11%*	*-4%*	*-6%*	**-**

Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered overnights summer season 2025

	Jun-Aug 2025	Change-% vs. Jun-Aug **2024**	*Change-% vs. Jun-Aug 2019*
Total	**7.9M**	**+1%**	*-1%*
Domestic	**5.8M**	**-2%**	*+1%*
Foreign, total	**2.1M**	**+12%**	*-6%*
Foreign excl. Russia	**2.1M**	**+12%**	*+6%*
Scandinavia	366,400	**+1%**	*-2%*
EU-27 + UK	**1.3M**	**+13%**	*+9%*
Asia	250,300	**+25%**	*-27%*
America	233,500	**+15%**	*+47%*



Main source markets

Summer high season 2025

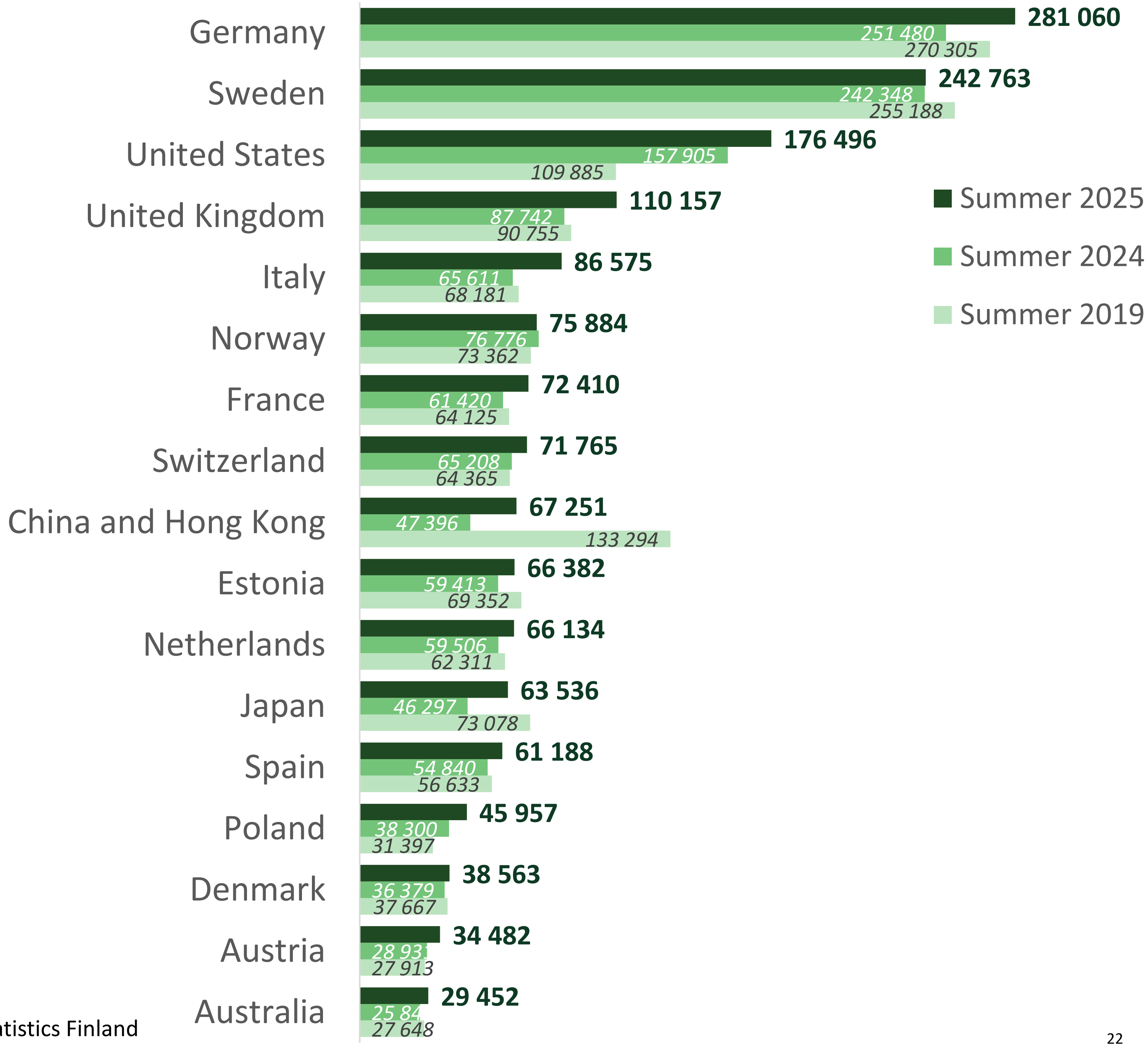
vs. summer 2024 & *summer 2019*

2.1M foreign overnights
+12% vs. summer 2024
-6% vs. summer 2019

There was **strong growth from multiple key source markets** compared to both last summer and summer 2019.

Among the primary source markets, only Sweden and Norway showed roughly the same figures as the previous summer.

When compared to summer 2019, overnight stays rose from almost all major source markets, with the exceptions of Sweden, China, Estonia, and Japan.



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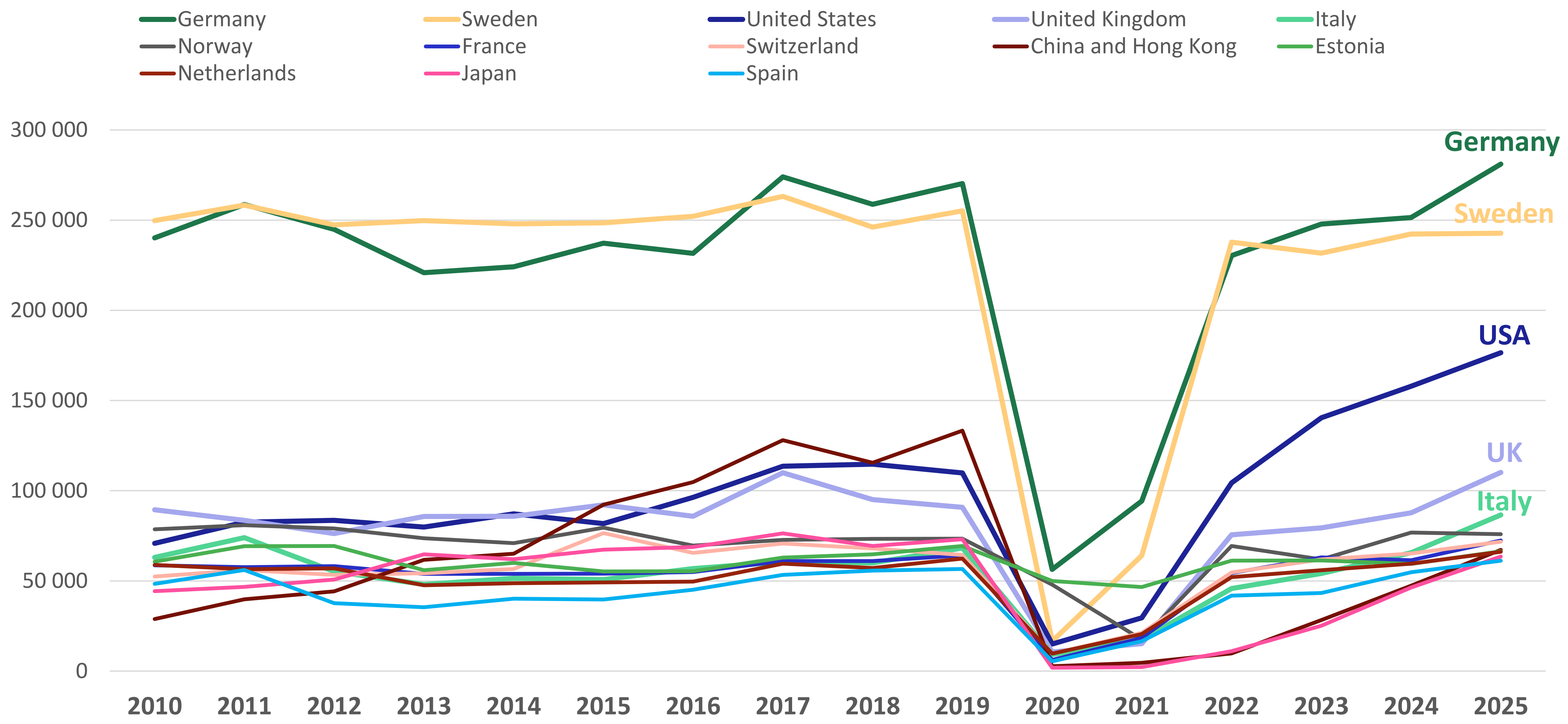
Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Overnights in Finland among the main markets – summer seasons 2010 - 2025



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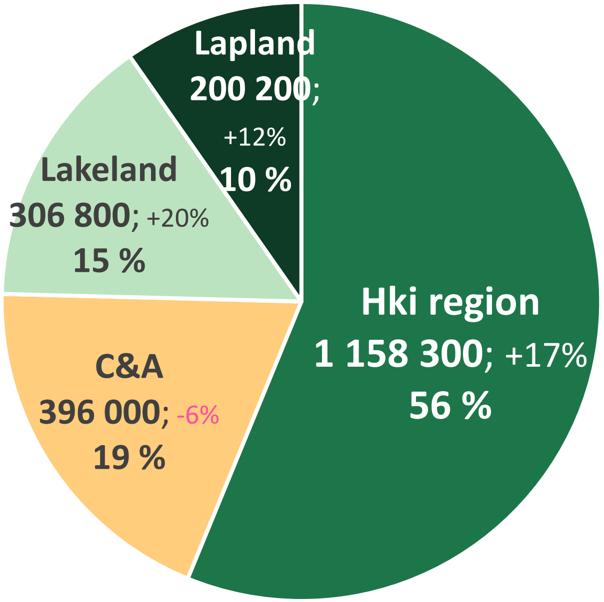
Overnights in high summer season 2025

And change compared to summer 2024 & pre-pandemic

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%*)

Foreign overnights / summer 2025



	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

High summer season 2025: Foreign overnights in main regions

Helsinki region

1,158,300 overnights
+17% vs. summer 2024
+10% vs. summer 2019

Share of all foreign **56%**
(summer 2024: 53%)

Main dest: **Helsinki**

Coast & archipelago

396,000 overnights
-6% vs. summer 2024
-18% vs. summer 2019

Share of all foreign **19%**
(summer 2024: 23%)

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

Lakeland

306,800 overnights
+20% vs. summer 2024
-31% vs. summer 2019

Share of all foreign **15%**
(summer 2024: 14%)

Main dest: **Tampere**, **Savonlinna**, **Jyväskylä**, **Kuopio**

Lapland region

200,000 overnights
+12% vs. summer 2024
-5% vs. summer 2019

Share of all foreign **10%**
(summer 2024: 10%)

Main dest: **Rovaniemi**, **Inari-Saariselkä**, **Kittilä-Levi**, **Ruka-Kuusamo**

Helsinki region – Top5 countries of origin & YoY change

USA	**136,500**	**+8%**
Germany	**114,200**	**+25%**
UK	73,400	+24%
Japan	55,800	+41%
China & HK	55,800	+50%

Coast & archipelago – Top5 countries of origin & YoY change

Sweden	**152,200**	**-3%**
Germany	50,700	-10%
Norway	22,100	-19%
Estonia	20,000	+9%
USA	14,800	+20%

Lakeland – Top5 countries of origin & YoY change

Germany	**65,700**	**+3%**
Sweden	21,600	-13%
UK	18,600	+23%
USA	17,800	+85%
France	15,600	+25%

Lapland region – Top5 countries of origin & YoY change

Germany	**50,600**	**+16%**
Norway	19,900	+1%
Sweden	13,400	+14%
Switzerland	13,300	-3%
Italy	12,700	+44%
Netherlands	12,500	-5%

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Source: Visit Finland Statistics Service Rudolf, Statistics Finland

Registered overnights in the Nordics

Jan-Aug 2025

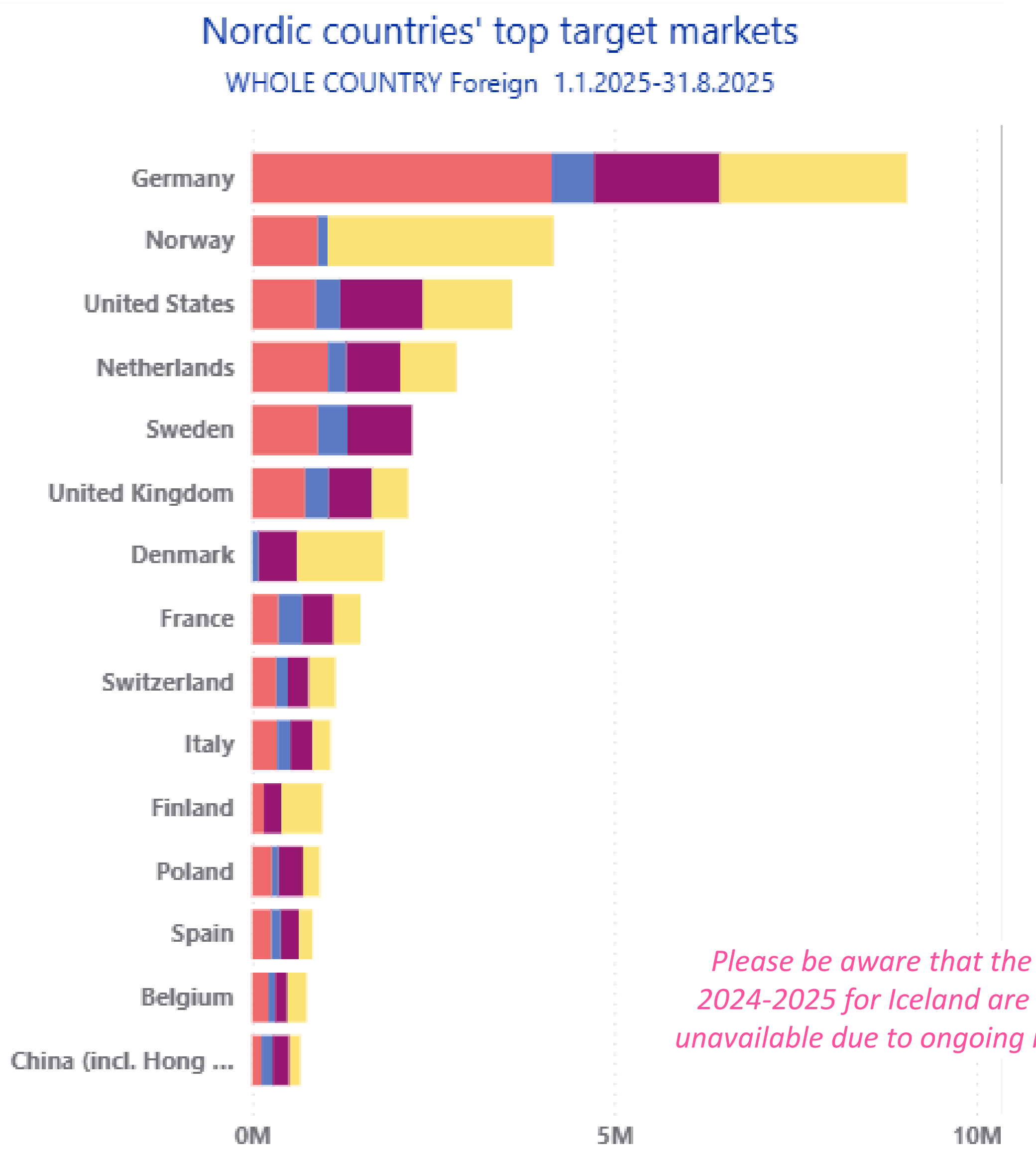
- The Nordic region has **experienced good growth** in **registered foreign overnight stays** from January to August 2025. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **12%** (Sweden leading with a 33% share).
  - **Germany** is clearly the biggest source market, and their overnights have increased in each of the four Nordic countries.
  - Beside Germany, overnights increased to each Nordic country from **the US**, **the Netherlands**, **Sweden**, **Denmark**, **France**, **Switzerland**, **Finland**, **Spain**, **Belgium**, and **China** among the main source markets.

Summer (Jun-Aug) 2025

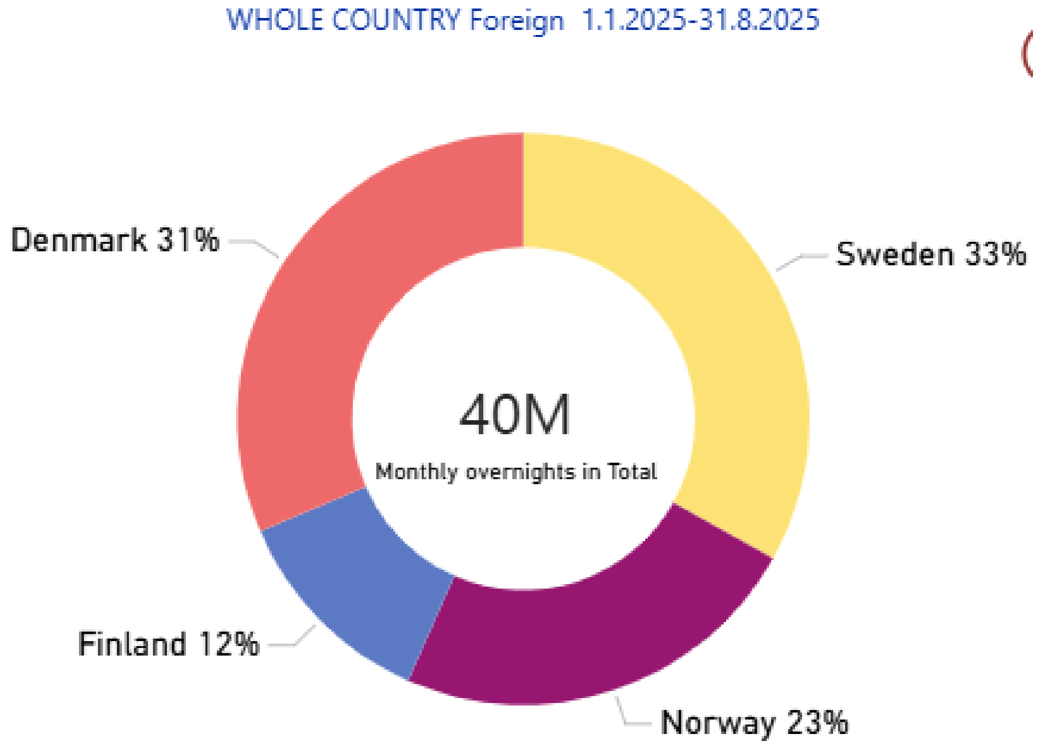
- **In summer high season 2025**, the number of foreign overnight stays reached nearly **25.2 million**, which was 12% more than in summer 2024. Overnights **increased** in **Sweden** (+13%), **Denmark** (+7%), **Norway** (+16%), and **Finland** (+12%).

- **Sweden** holds a **35% share** of the foreign overnights in **summer**, **Denmark 32%**, **Norway 25%**, and **Finland** only **8%**.

Foreign overnights in the Nordics (excl. Iceland) Jan-Aug 2025



Please be aware that the statistics 2024-2025 for Iceland are currently unavailable due to ongoing revisions.



Nordics	Monthly	YoY change %
Sweden	13,244,091	11 %
Denmark	12,565,263	6 %
Norway	9,381,915	17 %
Finland	4,789,645	13 %

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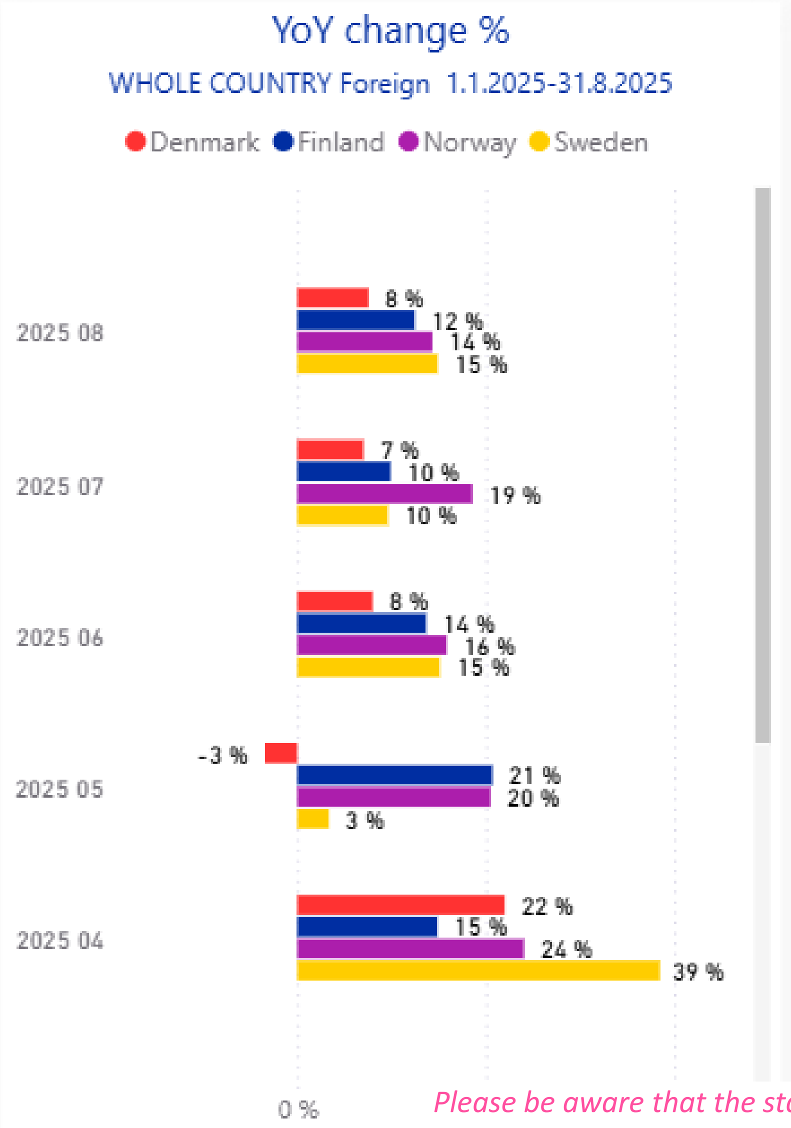
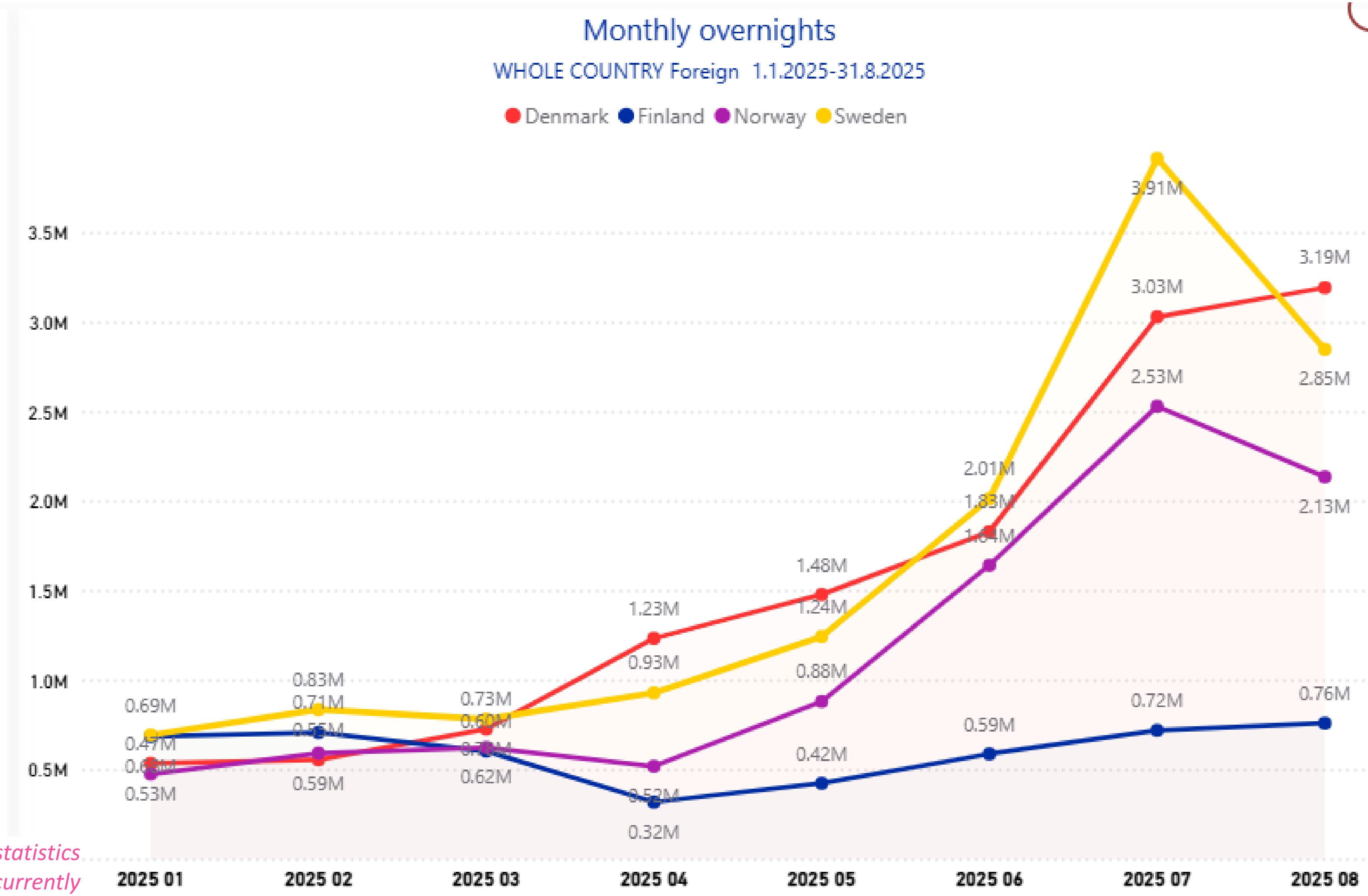
[Nordic report]

Monthly overnights in the Nordics (excl. Iceland) Jan-Aug 2025





Please be aware that the statistics 2024-2025 for Iceland are currently unavailable due to ongoing revisions.

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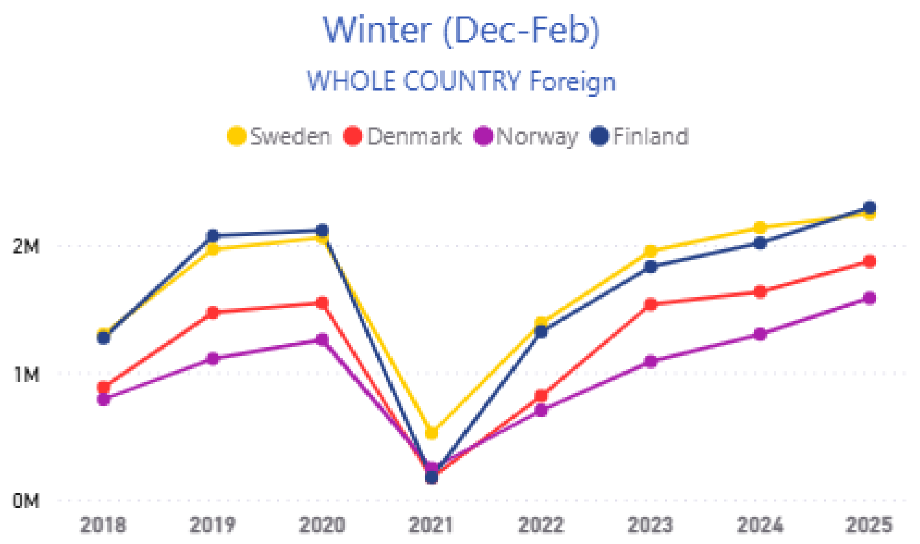
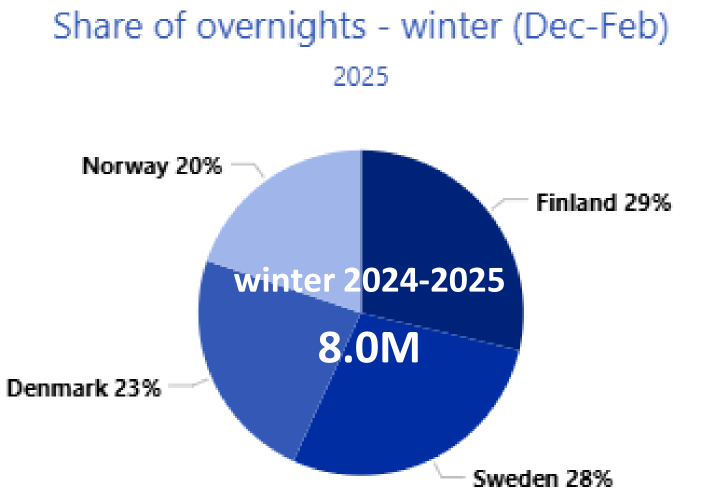
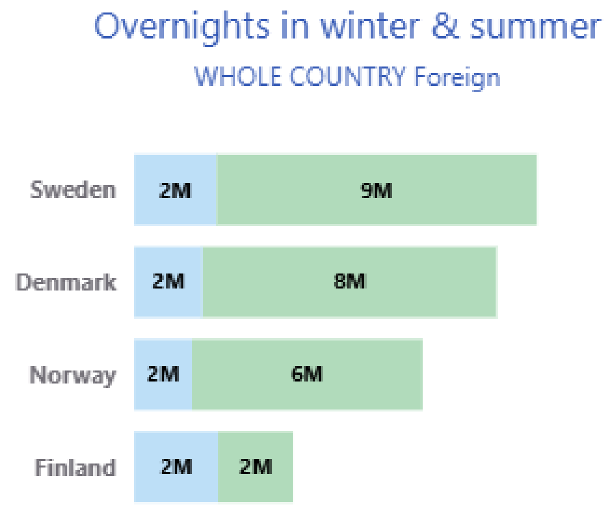
Nordic report

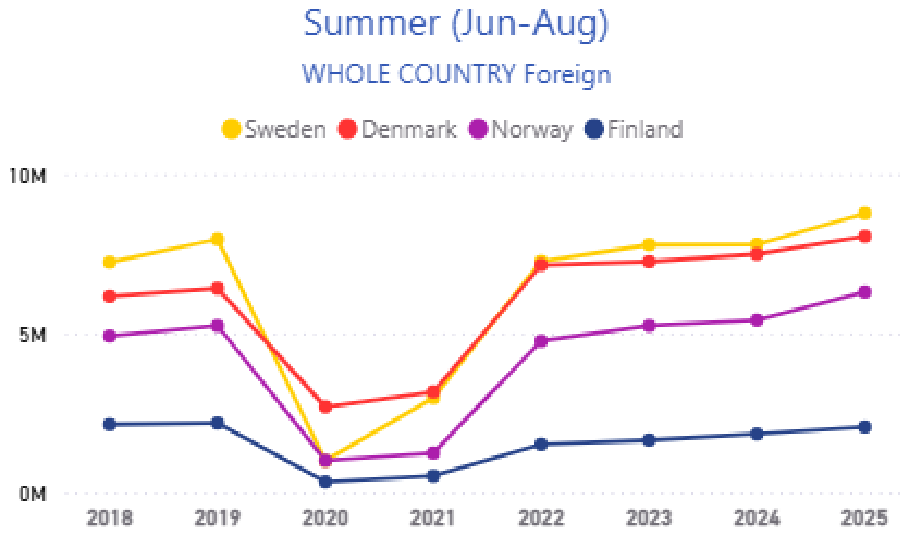
Winter & summer high seasons:

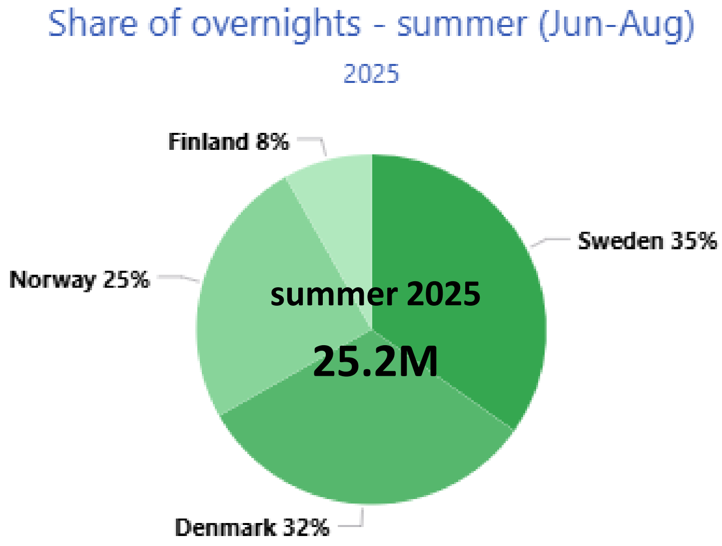
Foreign registered overnights in the Nordics (excl. Iceland)

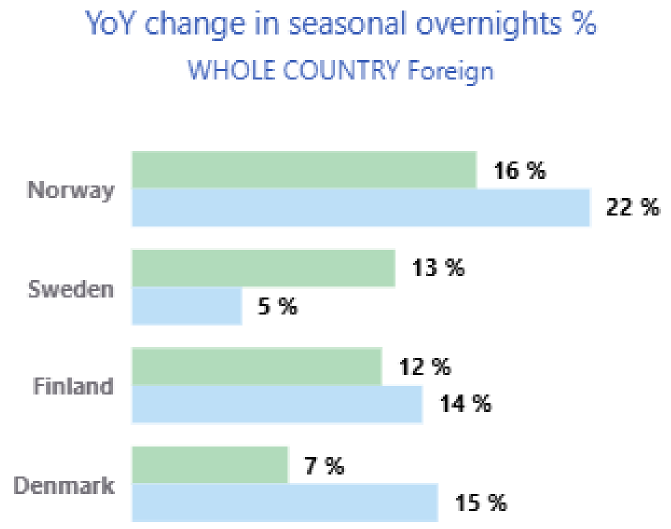












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Nordic report

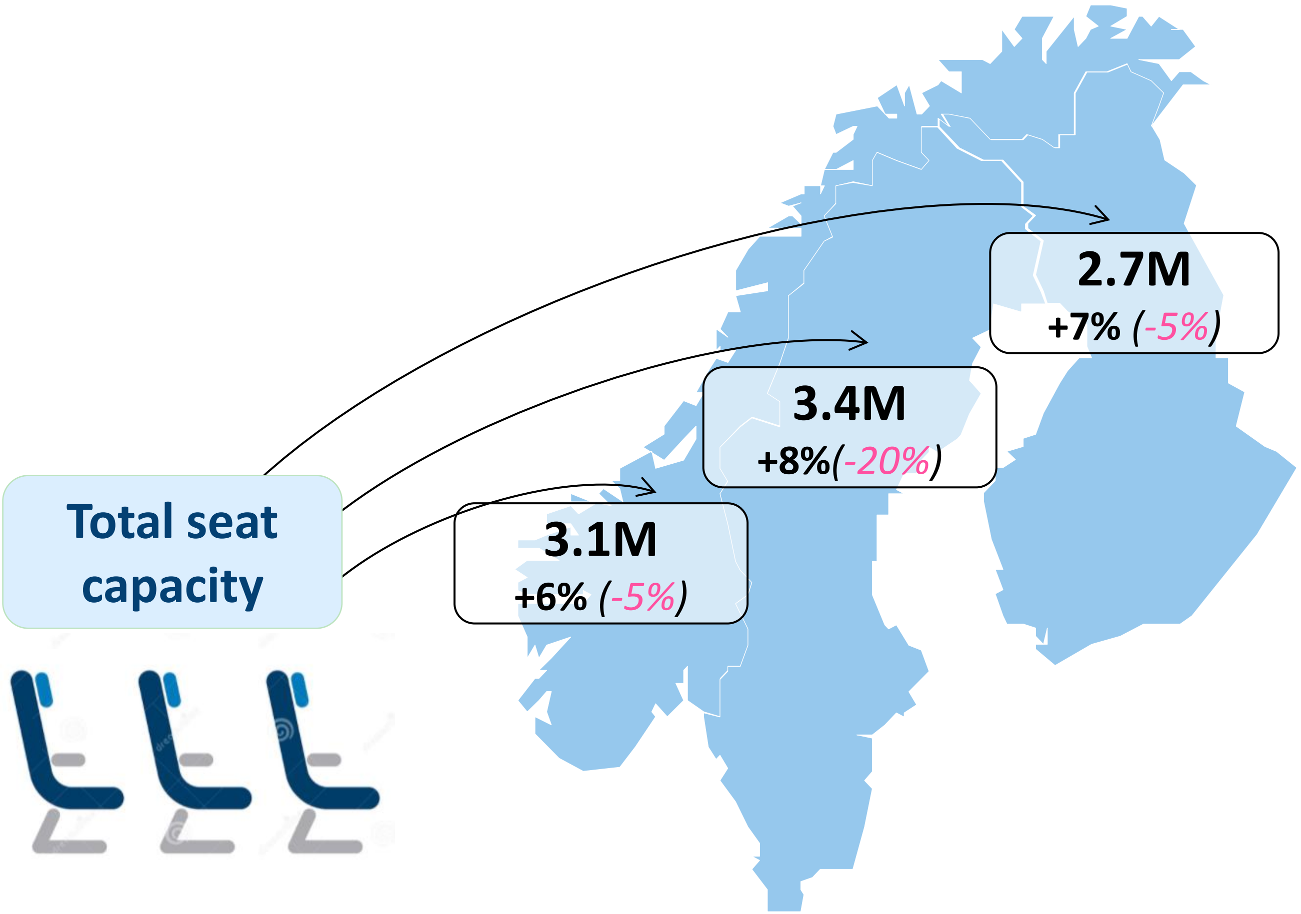
Sources: Visit Finland Statistics Service Rudolf, Statistics Finland, Statistics Sweden, Norway, Iceland, and Denmark

International Flight Seat Capacity Dec 2025 – Feb 2026

- Overall **int'l seat capacity to Finland** during the high winter season is showing a **7% increase** compared to last winter.
  - Seat capacity from **Europe** is set to grow by **6%**, *reaching levels comparable to those before the pandemic*. Weekly flights from Europe will increase to both Helsinki and airports in the Lapland region.
  - Seat capacity from **Asia** rises by 10% from the previous winter, *though it remains 32% lower than the winter of 2019*.
  - Seat capacity from the **US** is significantly higher than both last winter (+20%) and *the winter of 2019 (+81%)*.

Total Seat capacity to FI, SE & NO for Dec 2025 – Feb 2026

Comparison to previous winter and pre-pandemic

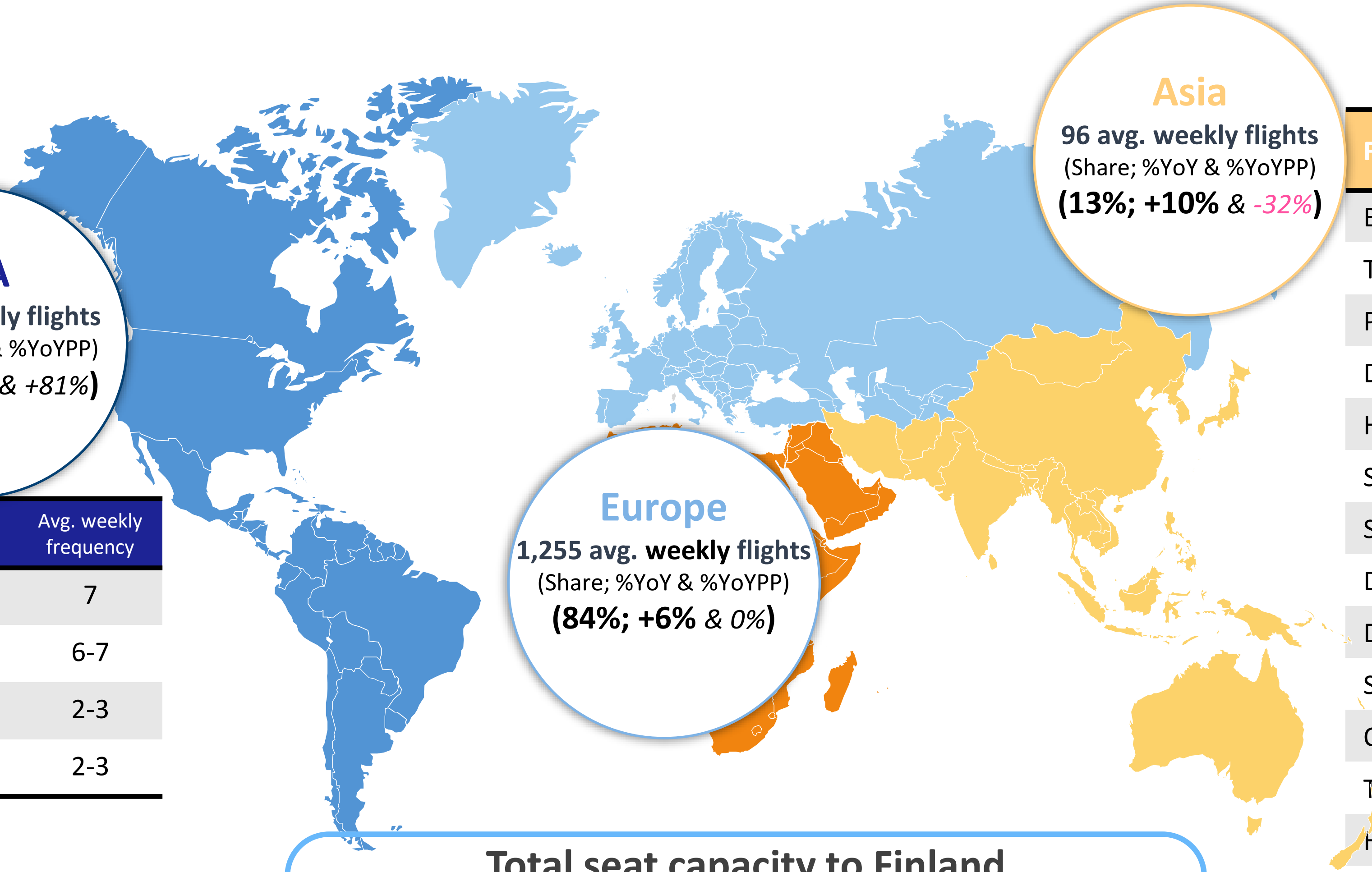


Database update 11-Oct

Source: Destination Gateway by ForwardKeys

Direct int'l flights to Finland Dec 2025 – Feb 2026

and change in seat capacity compared to previous winter (& pre-pandemic)



From	To	Avg. weekly frequency
New York (JFK)	HEL	7
Dallas (DFW)	HEL	6-7
Los Angeles (LAX)	HEL	2-3
Miami	HEL	2-3

From	To	Average weekly frequency
Bangkok (BKK)	HEL	14
Tokyo (HND)	HEL	10-11
Phuket (HKT)	HEL	7-9
Doha (DOH)	HEL	7
Hong Kong (HKG)	HEL	7
Singapore (SIN)	HEL	7
Seoul (ICN)	HEL	7
Delhi (DEL)	HEL	6-7
Dubai (DXB)	HEL	5-7
Shanghai (PVG)	HEL	6
Osaka (KIX)	HEL	2-4
Tokyo (NRT)	HEL	2-4
Hurghada (HRG)	HEL	2-3
Zhengzhou (CGO)	HEL	1

Total seat capacity to Finland for Dec 2025 – Feb 2026

2.7 M

+7% vs. **prev. winter** & *-5% vs. winter 2019*

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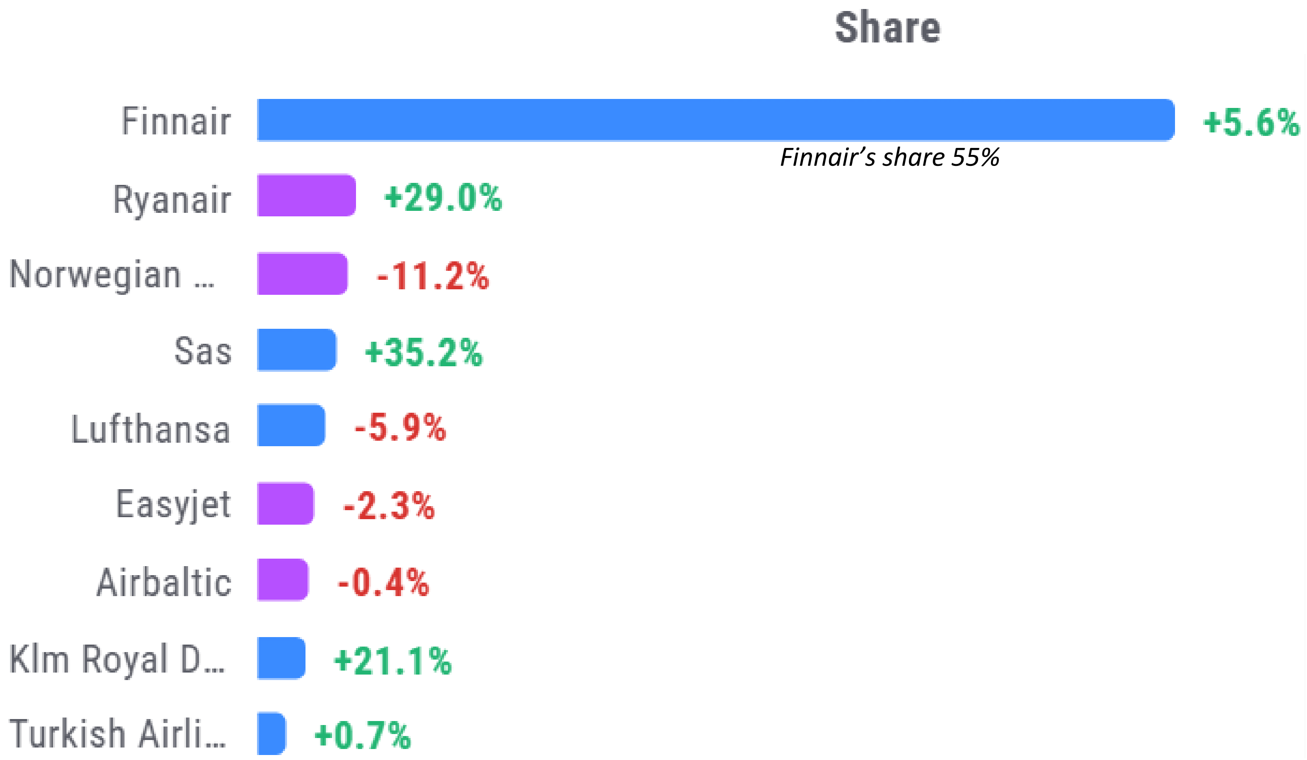
Source: Destination Gateway by ForwardKeys
Database update 11-Oct

EUROPE to Finland / Dec 2025 – Feb 2026

From (selected countries)	**Share**	Seat capacity compared to winter 2025	*Seat capacity compared to winter 2019*
Germany	13%	**0%**	*-4%*
UK	12%	**+1%**	*+8%*
Sweden	10%	**-1%**	*-33%*
Spain	10%	**-4%**	*-14%*
Denmark	6%	**+41%**	*+3%*
Netherlands	6%	**+19%**	*+29%*
France	6%	**-9%**	*+38%*
Norway	4%	**+18%**	*+2%*
Italy	4%	**+12%**	*+54%*
Latvia	4%	**+7%**	*+64%*
Poland	4%	**+6%**	*+25%*
Switzerland	3%	**+9%**	*+39%*
Turkiye	3%	**+6%**	*+91%*
Estonia	3%	**-3%**	*+38%*
Belgium	3%	**+5%**	*+37%*

Top10 airlines operating from Europe to Finland

+6.2%
YOY for selected airlines



Source: Destination Gateway by ForwardKeys
Database update 11-Oct

Direct flights to Helsinki & main airports in Lapland

Winter high season (Dec/2025 – Feb/2026)

Direct scheduled flights & TUI flights to Lapland during Dec/2025 – Feb/2026

To	Countries connected	Weekly flights, avg.	Weekly flights YoY	Seat capacity	Capacity, YoY-%	No. of airlines
Rovaniemi	**15**	**115**	+15	**257,000**	+18%	22
Kittilä	**12**	**39**	+4	**84,600**	+11%	17
Ivalo	**7**	**12**	+2	**24,900**	+14%	10
Kuusamo	**5**	**10**	+1	**23,200**	+5%	7

Connectivity to **Helsinki** and the main airports in **Lapland region** is clearly **improving** during the coming winter season.

Direct scheduled flights to Helsinki during Dec/2025 – Feb/2026

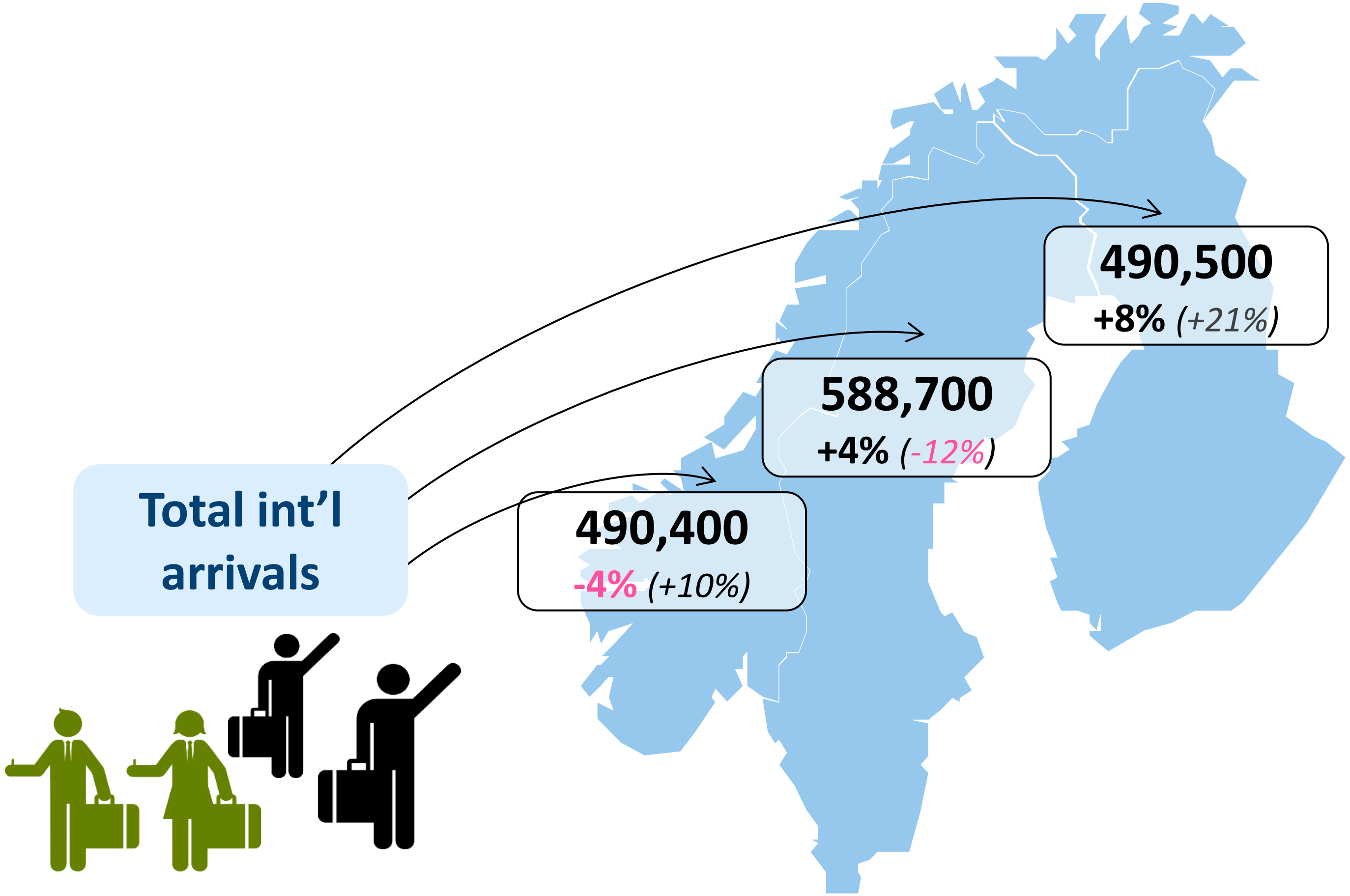
To **Helsinki** from	Countries connected	Weekly flights, avg.	Weekly flights YoY	Seat capacity	Capacity, YoY-%	No. of airlines
Europe	**24**	**1,016**	+45	**1.8M**	+3%	15
Asia	**10**	**96**	+8	**336,900**	+10%	6
America	**1**	**21**	+3	**73,800**	+17%	1

Forecast for Flight Arrivals December 2025 – February 2026

- The forecast for **total international flight arrivals to Finland** during the **high winter season** of December 2025 to February 2026 indicates **growth** compared to both the previous winter and the pre-pandemic winter period.
    - Arrivals from the **UK**, the **Netherlands**, **Italy**, **Spain**, **Switzerland**, the **US**, and **Denmark** among the main source markets are projected to surpass levels seen during the previous winter.
    - Connectivity to Helsinki and Lapland is clearly improving compared to previous winter, so the **forecast for arrivals** especially to **Lapland is very positive**.
- Flight arrivals to **Sweden** are anticipated to **rise compared to last winter**, though they are expected to remain below pre-pandemic figures.
- While flight arrivals from **Norway** have consistently increased on a year-on-year basis each season since the pandemic, a **decline is expected this winter** compared to the previous year.

Forecast of total int’l arrivals to FI, SE & NO in Dec/2025 – Feb/2026

Comparison to previous winter *(and pre-pandemic)*



Database update 05-Oct

Visit Finland

Source: Destination Gateway by ForwardKeys

Forecast of Flight arrivals in Dec 2025 – Feb 2026

Comparison to previous winter *(and pre-pandemic)*

Worldwide (excl. domestic) → Finland

Database update 05 Oct

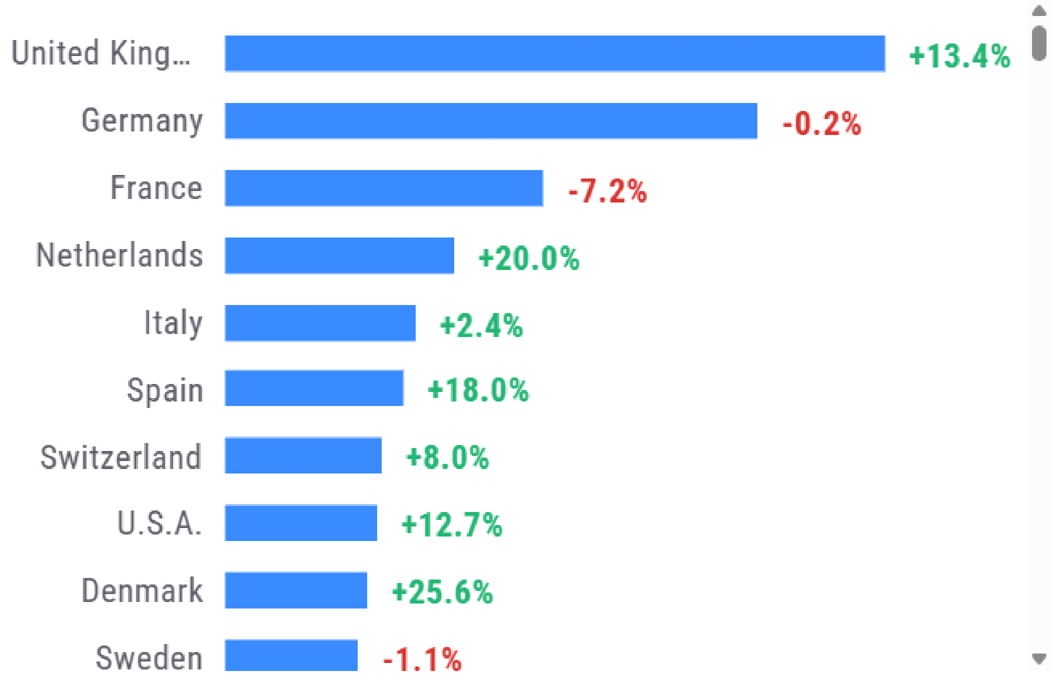
Filtered period | 01 Dec 2025 - 28 Feb 2026

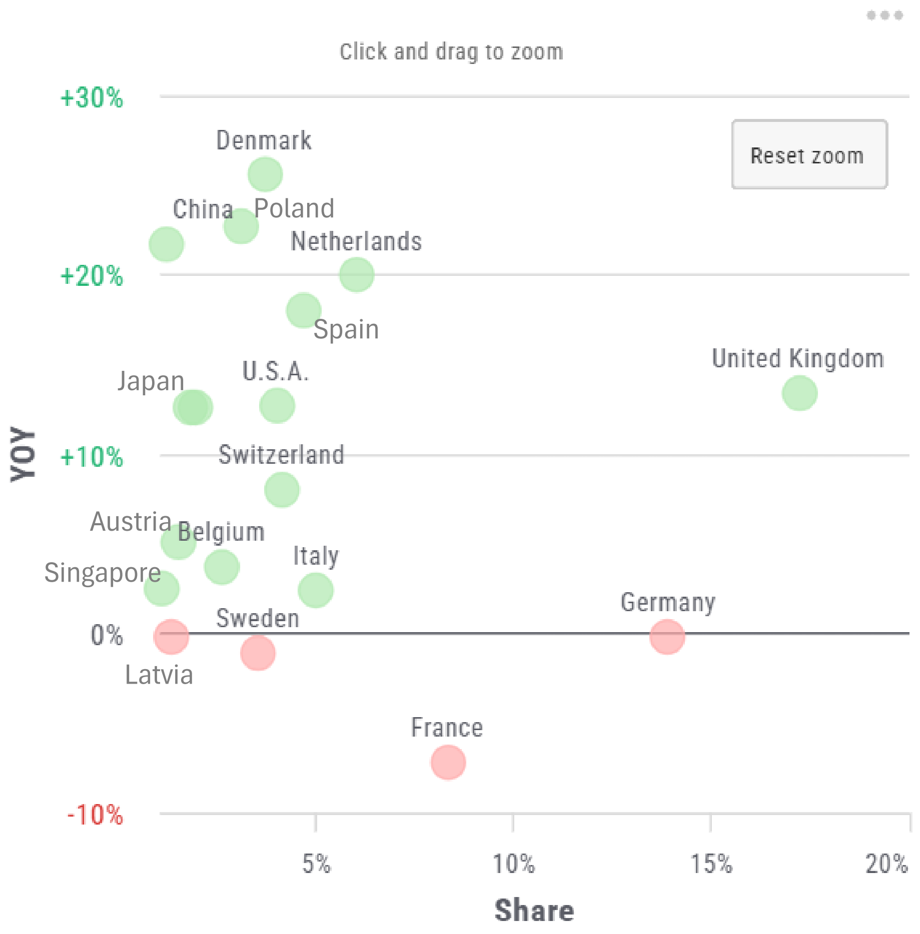
490,485
tourist arrivals

+7.8% *(+21%)*
YOY for selected origins

Main source markets

Share ↑↓ YOY ↑↓





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Forecast for total int’l arrivals to Finnish airports during Dec/2025 – Feb/2026

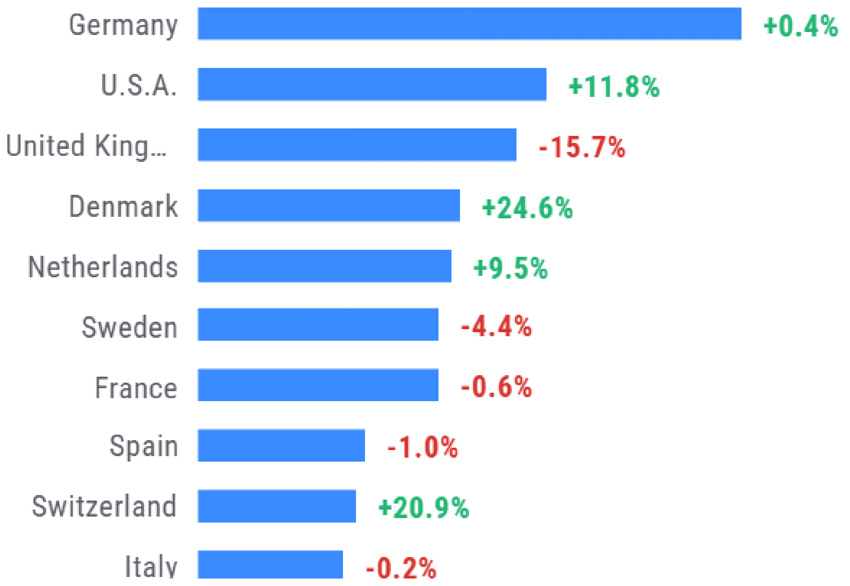
Worldwide (excl. domestic) → Helsinki (HEL)

Filtered period | 01 Dec 2025 - 28 Feb 2026

212,725 tourist arrivals

+2.8% YOY for selected origins

Share ⇅ **YOY** ⇅



Database update 05-Oct

Worldwide (excl. domestic) → Finland

Filtered period | 01 Dec 2025 - 28 Feb 2026

490,485 tourist arrivals

+7.8% YOY for selected origins

Arrival destination	Forecast of Arrivals 12/2025-02/2026	Share of int’l arrivals	Change vs. 12/2024-02/2025
Helsinki	**212,700**	**43%**	**+3%**
Rovaniemi	**143,900**	**29%**	**+17%**
Kittilä	52,800	11%	**+3%**
Ivalo	27,500	6%	-4%
Kuusamo	20,400	4%	**+23%**
Oulu	9,400	2%	0%
Turku	8,400	2%	**+36%**
Vaasa	4,300	1%	**+5%**
Kuopio	3,700	1%	**+25%**
Kajaani	2,300	-	**+48%**
Tampere	1,900	-	**+1%**

To Joensuu, Jyväskylä, Kemi/Tornio, Kokkola/Pietarsaari, Lappeenranta, Mariehamn, Pori, and Savonlinna less than one thousand bookings for winter high season 2026

Visit Finland

Source: Destination Gateway by ForwardKeys

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