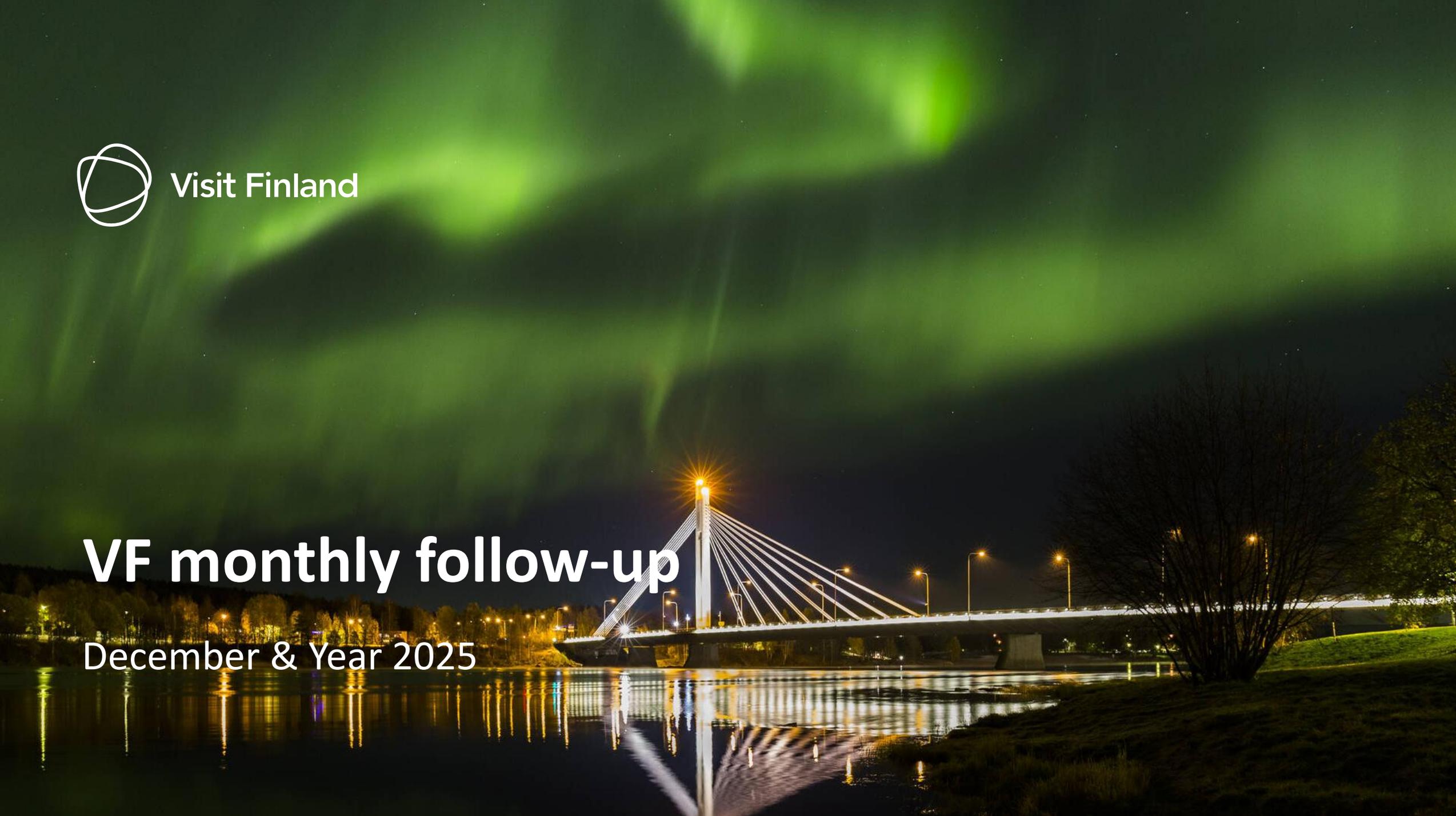




Visit Finland

VF monthly follow-up

December & Year 2025



Summary

Travel to Finland and to the Nordics

- **Robust Recovery:** In 2025, Finland saw **5.1 million foreign visits**, a **+4%** increase from 2024. Visitor **spending totaled €3.7 billion**, which was **2% lower** than the previous year – indicating a small dip in average spend per trip as the medium length of stay decreased. **Registered foreign overnight stays** climbed to **7.2 million**, the highest ever annual figure, **+13% YoY** and about **2% above the 2019** pre-pandemic peak. The overall **carbon efficiency** of tourism (euros earned per unit CO₂) was around **€1.1 per kg CO₂**, slightly below the 2024 level.
- **Leisure vs. Business Travel:** Leisure tourism drove the growth. **Leisure trips** represented **76%** of all international visits, rising **+7%** in volume with a **+3%** increase in traveller expenditure compared to 2024. Notably, the uptick in leisure was fuelled entirely by **holiday visitors**. In contrast, **business-related trips** (24% of total visits) **declined by 4%**, and spending by business travellers fell **15%** year-on-year. This indicates corporate travel has been slower to recover, although one segment – trips for conferences and fairs – saw a *higher number of visits* even as their spending decreased.
- **Top Source Markets for registered overnights:** Germany remained the **largest foreign market** for Finland in 2025, followed by the UK, Sweden, the United States, and France. **All major markets** posted higher overnight figures than in 2024. However, a few key sources have yet to return to pre-pandemic volumes – for example, Sweden, Estonia, **China** (including Hong Kong), **Japan**, and Norway all delivered fewer overnight stays in 2025 than in 2019. Overall, the breadth of Finland’s tourism recovery is strong, with most traditional markets rebounding or even surpassing 2019 levels.

Summary

Travel to Finland and to the Nordics

- **Regional Highlights – Helsinki & Lapland:** Every main region in Finland enjoyed growth in foreign overnight stays and accommodation revenue in 2025. The capital **Helsinki region** and **Lapland** were standout performers. Helsinki region's hotels saw a **+16%** jump in foreign accommodation revenue (reaching €263 million), and roughly **48%** of all overnights in Helsinki were by international guests. Lapland region's tourism surged with foreign lodging revenue up **+23%** (to €246 million), and **58%** of all nights spent in Lapland coming from foreign visitors. These two regions together accounted for a large share of Finland's international tourism activity in 2025, reflecting Helsinki's role as a year-round gateway and business hub, and Lapland's strong appeal for winter travellers.
- **Seasonal Peaks – December 2025 and January 2026:** Finland's winter season seem to be setting again new records. **December 2025** saw **987,900 foreign overnight stays** – the highest December ever, up **+9%** from Dec 2024 and **+25%** vs Dec 2019. This boom was driven by Lapland's popular Arctic destinations: **Lapland region alone accounted for 62%** of all foreign overnights in Finland that month (609,200 nights, +7% YoY). The **UK was the top source** market in December, with British visitors contributing 262,600 overnight stays (+9% YoY), which is **27% of all foreign nights**; tellingly, **91% of those British nights were in Lapland**. The momentum continued into **January 2026**, which recorded about **702,500 foreign overnights** (+3% YoY) – the second-highest January on record (just below January 2020). Key markets for January were Germany, the UK, and France.

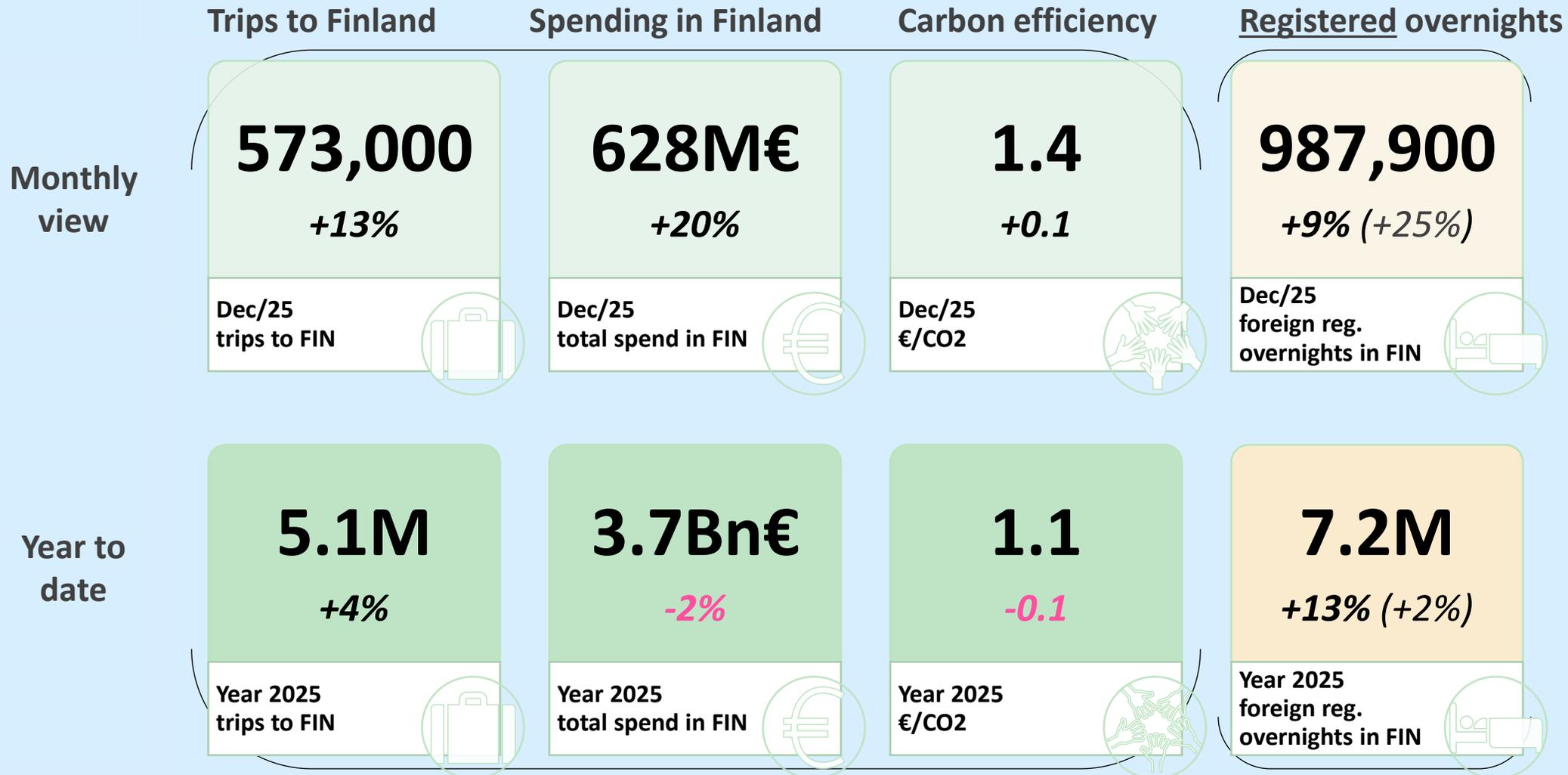
Summary

Travel to Finland and to the Nordics

- **Nordic Foreign Overnights 2025:** The four Nordic countries combined recorded nearly **53 million** international overnight stays in 2025, an **+11%** increase over 2024. **Sweden** and **Denmark** each saw roughly **17 million** foreign overnights (~32% of the Nordic total per country), **Norway** ~**12 million** (23%), and **Finland** ~**7 million** (13%). In other words, **Finland's share** of the region's foreign nights was about **13%** in 2025. All four countries enjoyed strong growth in international stays. **Germany** was the largest source market and posted increased overnight volumes in *every* Nordic country. Other key contributors to regional growth included visitors from **the United States** and **the Netherlands**, along with heightened intra-Nordic travel (more Swedes, Danes, etc., visiting neighboring Nordics). Several European markets – *e.g.* **France** and **Switzerland** – and long-haul markets like **China** also saw higher foreign overnight counts across the Nordics, underscoring a broad-based tourism rebound in 2025.
- **Air Access and Early-2026 Outlook:** International air connectivity improved alongside tourism growth. In **January 2026**, Finland received roughly **138,600 international flight arrivals**, up **+7%** from a year prior. Airline seat capacity to Finland has expanded as well – for example, available seats on flights to Finland in January 2026 were about **3% higher** than the previous January. Looking ahead, **spring 2026** (Mar–May) is projected to bring further gains. Total seat capacity on international flights to Finland for spring is expected to reach about **2.8 million seats**, roughly **+5%** compared to spring 2025. Likewise, forward bookings indicate a **slight increase in flight arrivals** to Finland in spring 2026 versus the previous year. Approximately **93% of all international air seats** to Finland continue to funnel through Helsinki Airport during the spring season, highlighting Helsinki's dominance as the entry point. The leading origin markets for upcoming flights remain **Germany, Sweden, and the UK** (mirroring their importance in visitor numbers). Overall, these trends in aviation capacity and bookings support a positive outlook for early 2026, suggesting Finland's tourism growth is set to continue into the new year.

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

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



Int'l Flight Bookings & Seat Capacity to Finland

Compared to corresponding period in *previous year*

Flight arrivals / outlook for arrivals*

Seat capacity

Monthly
historical
& forecast
view

138,600

+7%

Jan/26 int'l flight
arrivals to FIN



137,200

+3%

Feb/26 outlook for
int'l flight arrivals
to FIN



869,700

+3%

Jan/26 flight seat
capacity to FIN



814,700

+2%

Feb/26 outlook for
seat capacity to FIN



6 months'
historical
& forecast
view

680,600

+5%

08/25 – 01/26
(6 mths) arrivals to
FIN



598,000

+6%

02-07/26
(6 mths) outlook for
flight arrivals to FIN



5.4M

+4%

08/25 – 01/26
(6 mths) flight seat
capacity to FIN



5.7M

+7%

02-07/26
(6 mths) outlook for
seat capacity to FIN



Border Survey

Year 2025

Foreign visitors made **5.1 million trips to Finland** in 2025, showing a **4% increase** compared to 2024. Total spending in Finland reached **3.7 billion euros**, which was a **2%** decrease from the previous year.

- **Leisure travel** comprised **76%** of all trips, with an **7% rise** in the number of trips and a **3% increase** in expenditure.
 - Among the leisure trips, **69% were holiday-related**, 24% were visits to friends or relatives, and 3% were for studying in Finland. **The rise** in both trip numbers and spending was seen **only in holiday trips** compared to 2024.
- **Work-related trips** accounted for 24% of all trips but declined by **4%**, while business traveller spending fell by **15%**.
 - Among the business trips, 32% were meetings or work-related visits of foreign companies, 30% involved work for a Finnish company, 20% were trips to conferences or fairs, and 18% were other types of work travel. **The number of trips for attending conferences or fairs notably increased** compared to 2024, although the total spending on these trips declined.

Border Survey Year 2025

- **5.1 million** visitors (YoY **+4%**)
 - 89% overnight trips
- Spending **3.7 billion€** (YoY **-2%**)
 - 722 € / trip (YoY **-5%**)
 - 85 € / day (YoY **+10%**)
- **76%** travelling for **leisure** (leisure trips **+7%** & spending **+3%**)
- Advance booking time, avg. **2.7 months** (YoY **+0.1 months**)
- Share of package trips **7%** (YoY **-1 %-points**)
- Median length of stay **3 nights** (YoY **-1 night**)



Border Survey / Year 2025

Foreign visitors in Finland

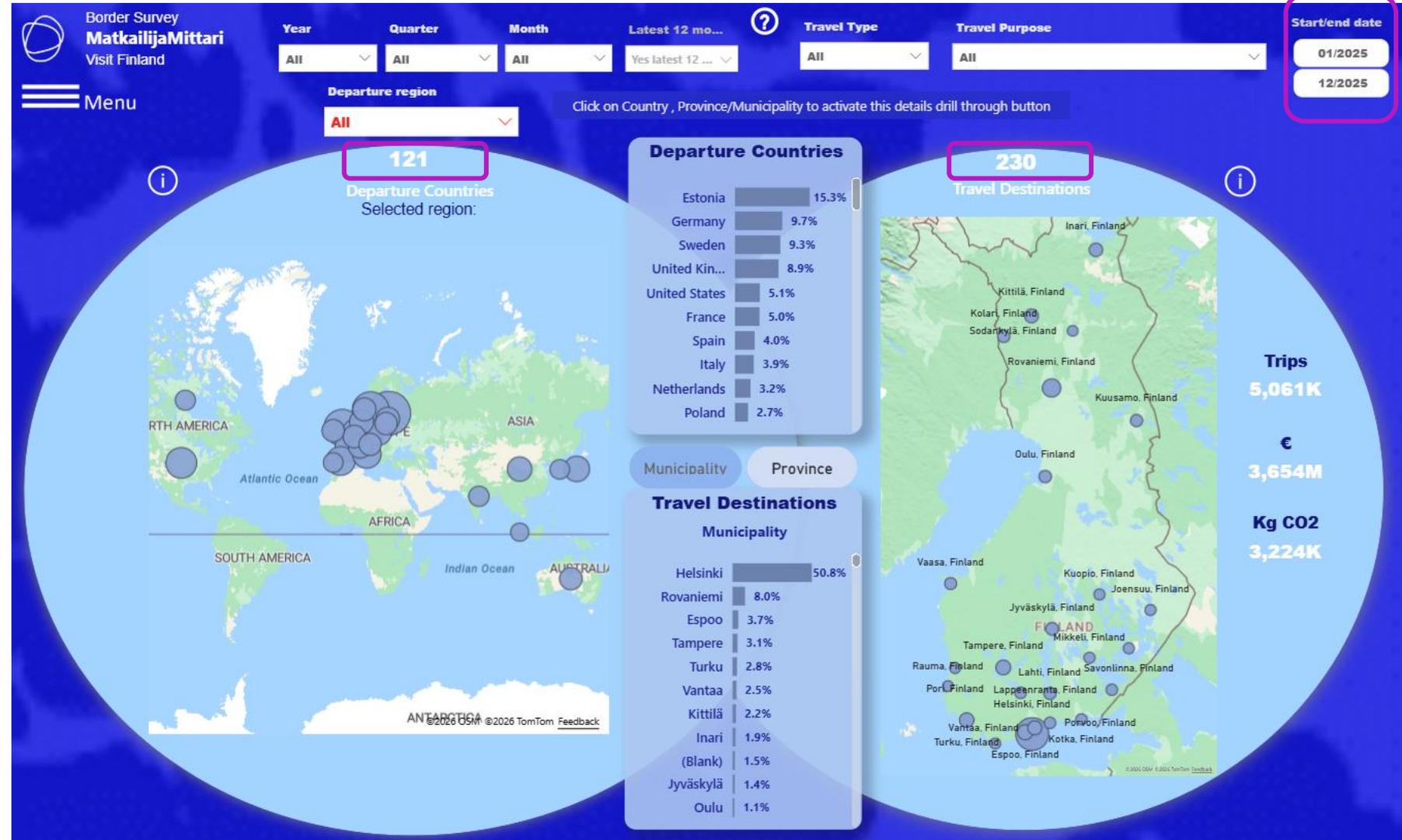
[Link to the report: Matkailijamittari - Visit Finland](#)

Top10 source markets for leisure/personal trips

- Estonia
- Germany
- UK
- Sweden
- France / USA
- Spain
- Italy
- Netherlands
- Japan

Top10 source markets for work related trips

- Estonia
- Sweden
- Germany
- UK
- Poland
- Latvia
- Italy
- USA
- France
- Netherlands



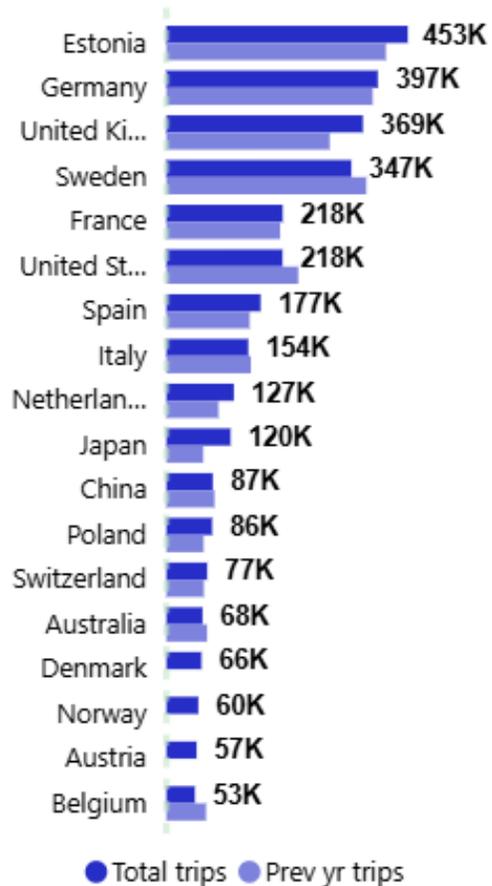
Leisure trips & spending (M€) in 2025

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

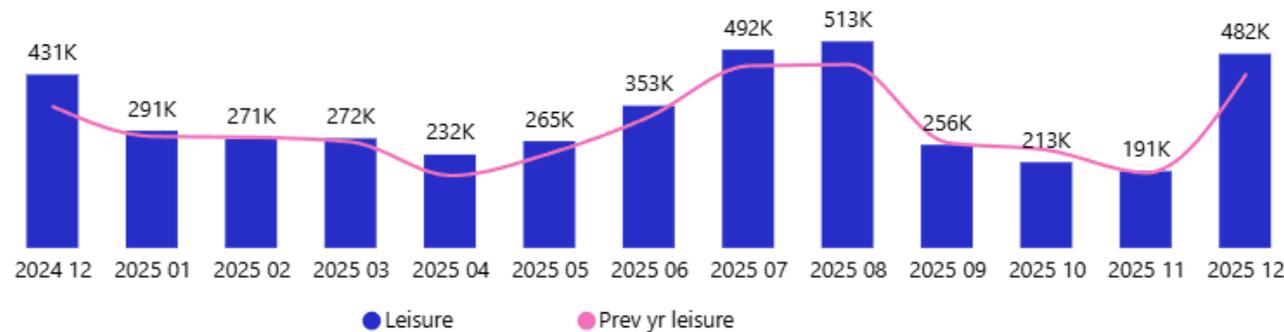
Leisure trips increased by **7%** compared to 2024, while **total expenditure** by leisure travellers also **grew by 3%**.

Among these trips, **69% were holiday-related**, 24% were visits to friends or relatives, and 3% were for studying in Finland. **The rise** in both trip numbers and spending was seen **only in holiday trips** compared to 2024.

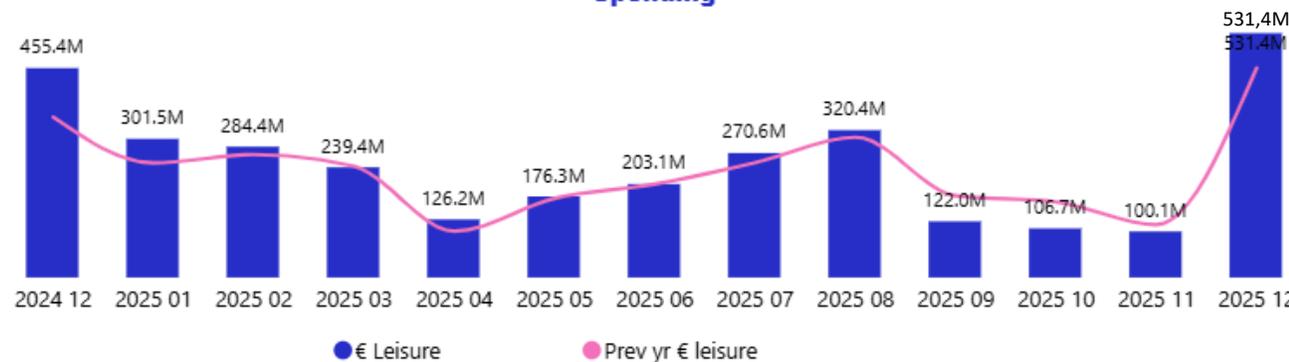
Departure country trips



Trips

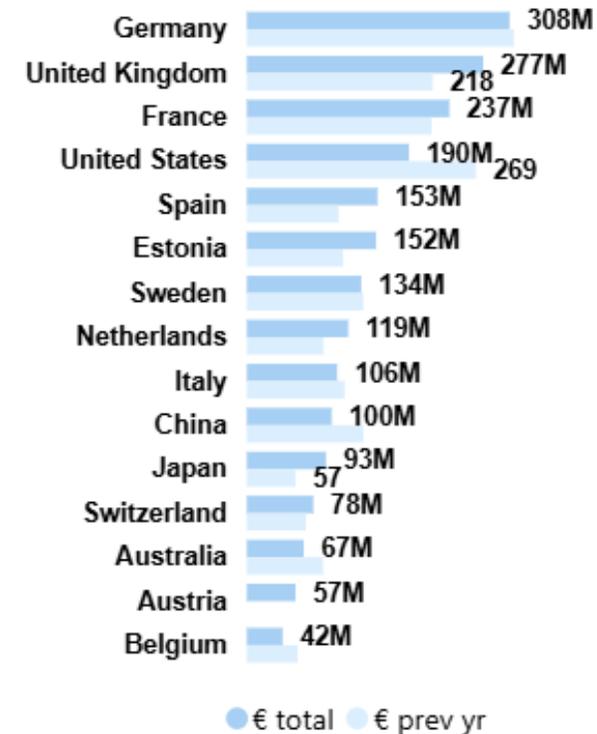


Spending



Spending by country

01/2025-12/2025 € TOTAL LEISURE



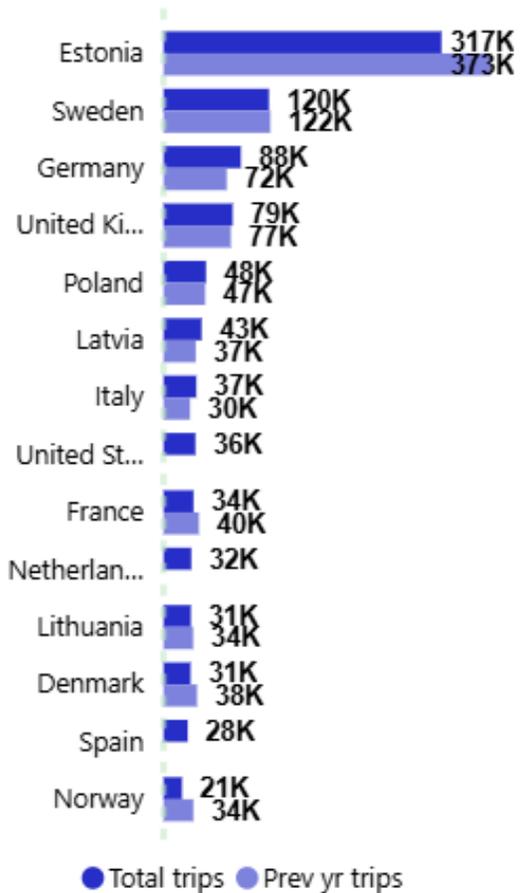
Business trips & spending (M€) in 2025

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

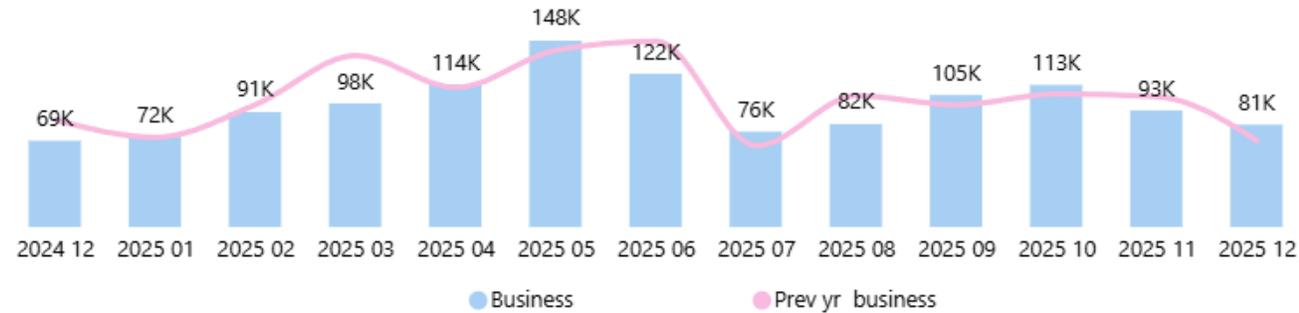
The number of **business trips decreased by 4%** compared to 2024, and **overall expenditure** by business travellers also **dropped by 15%**.

Among these business trips, 32% were meetings or work-related visits of foreign companies, 30% involved work for a Finnish company, 20% were trips to conferences or fairs, and 18% were other types of work travel. The **number of trips for attending conferences or fairs notably increased** compared to 2024, although the total spending on these trips declined.

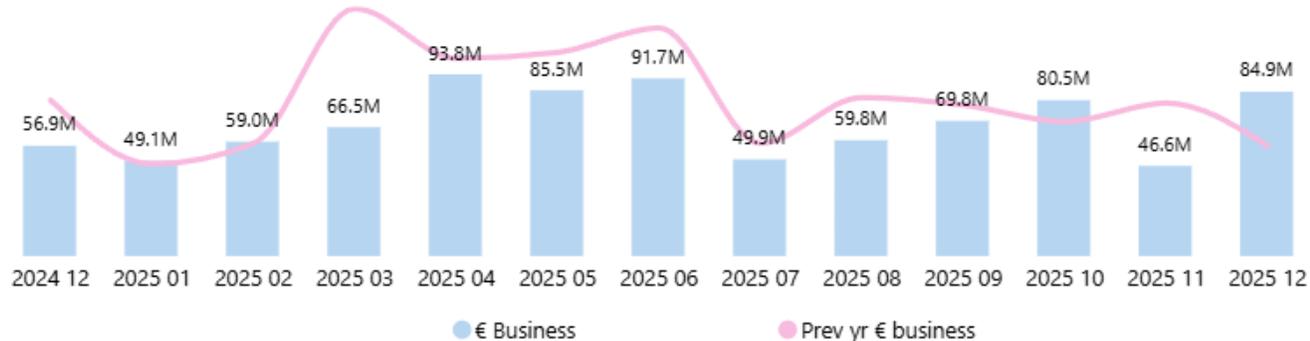
Departure country trips



Trips

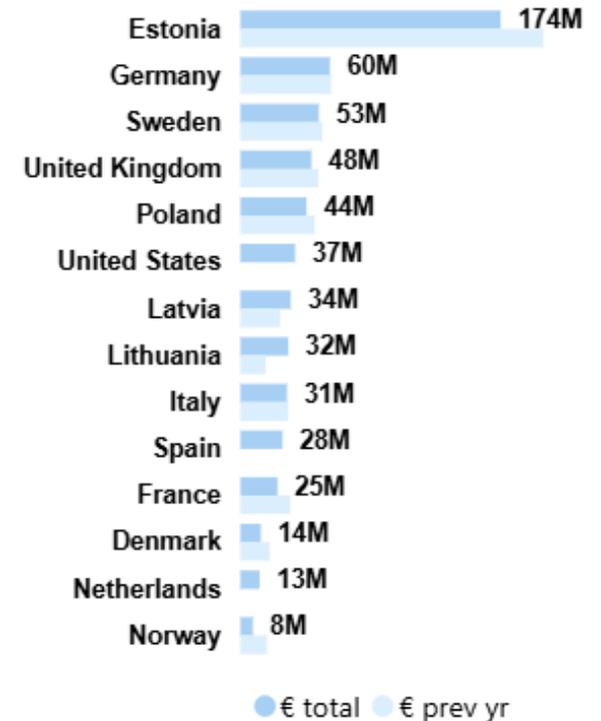


Spending



Spending by country

01/2025-12/2025 € TOTAL BUSINESS



Registered Overnights

Year 2025

- In 2025, the number of registered foreign overnight stays in Finland approached **7.2 million**, setting a **new annual record** with a **13% increase** compared to 2024 *and a 2% rise from 2019*.
- The top source markets were **Germany, the UK, Sweden, the USA, and France**.
- Total accommodation revenue grew by **6%**, driven by an **18% increase in foreign revenue**, while domestic revenue remained steady compared to 2024. Foreign revenue made up **37%** of total accommodation income, while foreign overnight stays representing **31%** of all overnights.
- Both foreign overnight stays and accommodation revenue rose across all major regions in Finland relative to 2024.

December 2025

- December set another **record for foreign overnight stays** in Finland, nearing one million nights with **987,900 foreign overnights**, reflecting a **9% YoY increase** and *a 25% growth compared to December 2019*.
- The **Lapland region accounted for 62%** of these foreign overnights, with **609,200 stays** (+7% YoY *and +38% vs Dec-2019*).
- The **UK was clearly the leading source market in December**, contributing **262,600 registered overnights** (+9% YoY *and +37% compared to Dec-2019*). British visitors represented **27% of all foreign overnight stays** in Finland during December, with **91% of these occurring in Lapland region**.

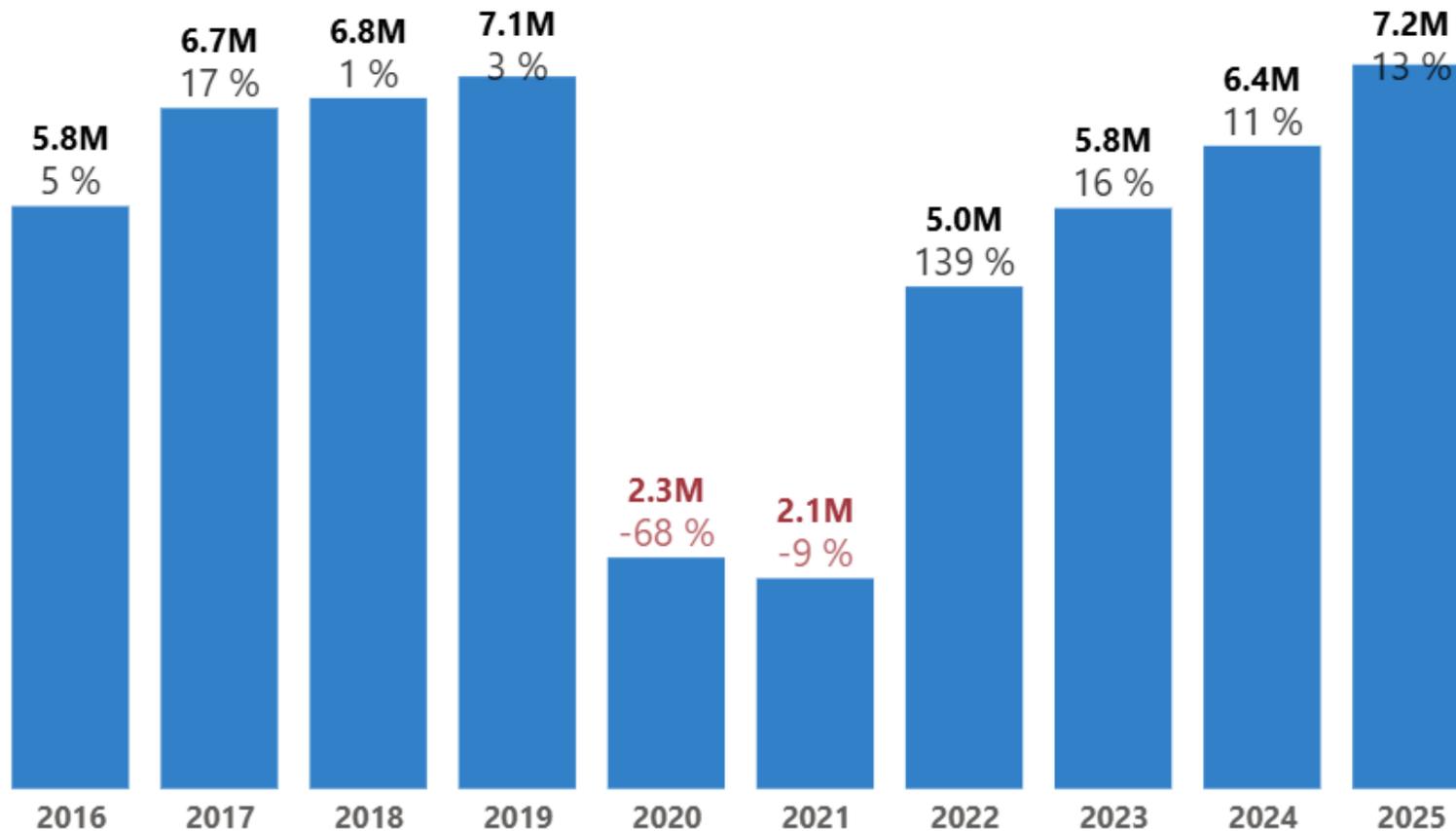
January 2026

- January 2026 marked the second highest number, after Jan-2020, for **foreign overnight stays in January**, reaching nearly **702,500 foreign overnights**, and reflecting a **3% YoY increase**. **Germany, the UK, and France** were the biggest source markets.

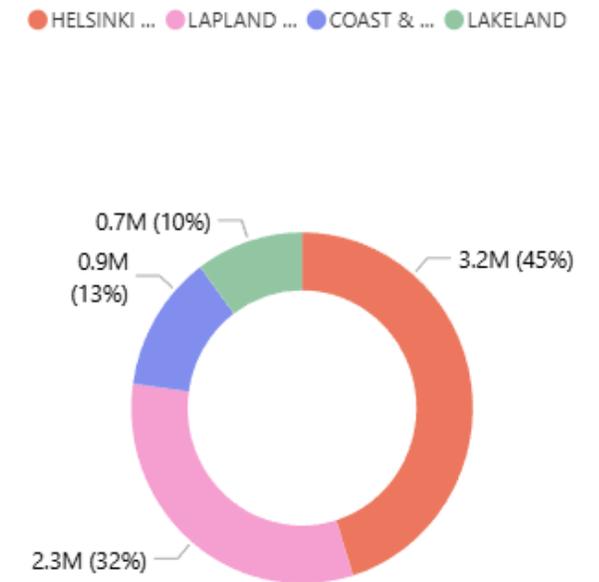
New record of foreign overnights in 2025

NO. OF OVERNIGHTS IN FINLAND AND YoY CHANGE %

Foreign



Foreign - Year 2025



Registered overnights Year 2025

	Year 2025	Change-% vs. Year 2024	Change-% vs. Year 2019
Total	23.2M	+2%	0%
Domestic	16.0M	-2%	0%
Foreign, total	7.2M	+13%	+2%
Foreign excl. Russia	7.2M	+13%	+15%
Scandinavia	0.9M	+7%	0%
EU-27 + UK	4.4M	+11%	+17%
Asia	1.1M	+28%	-9%
America	0.7M	+15%	+54%



Main source markets

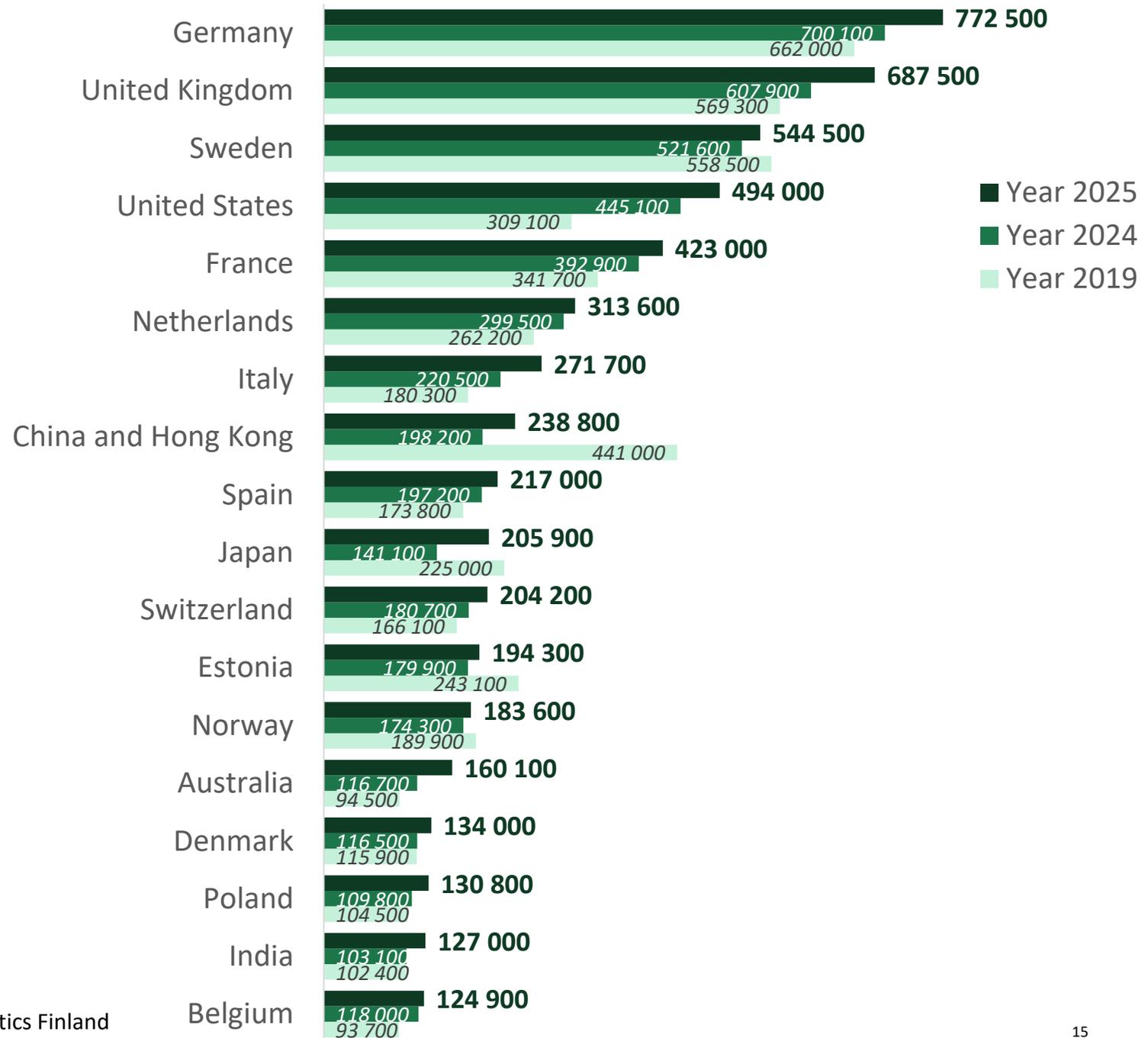
Year 2025

vs. Year 2024 & Year 2019

In 2025, **Germany** remained clearly the top source market for **registered overnights**. Top5 source markets included also **the UK, Sweden, USA, and France**.

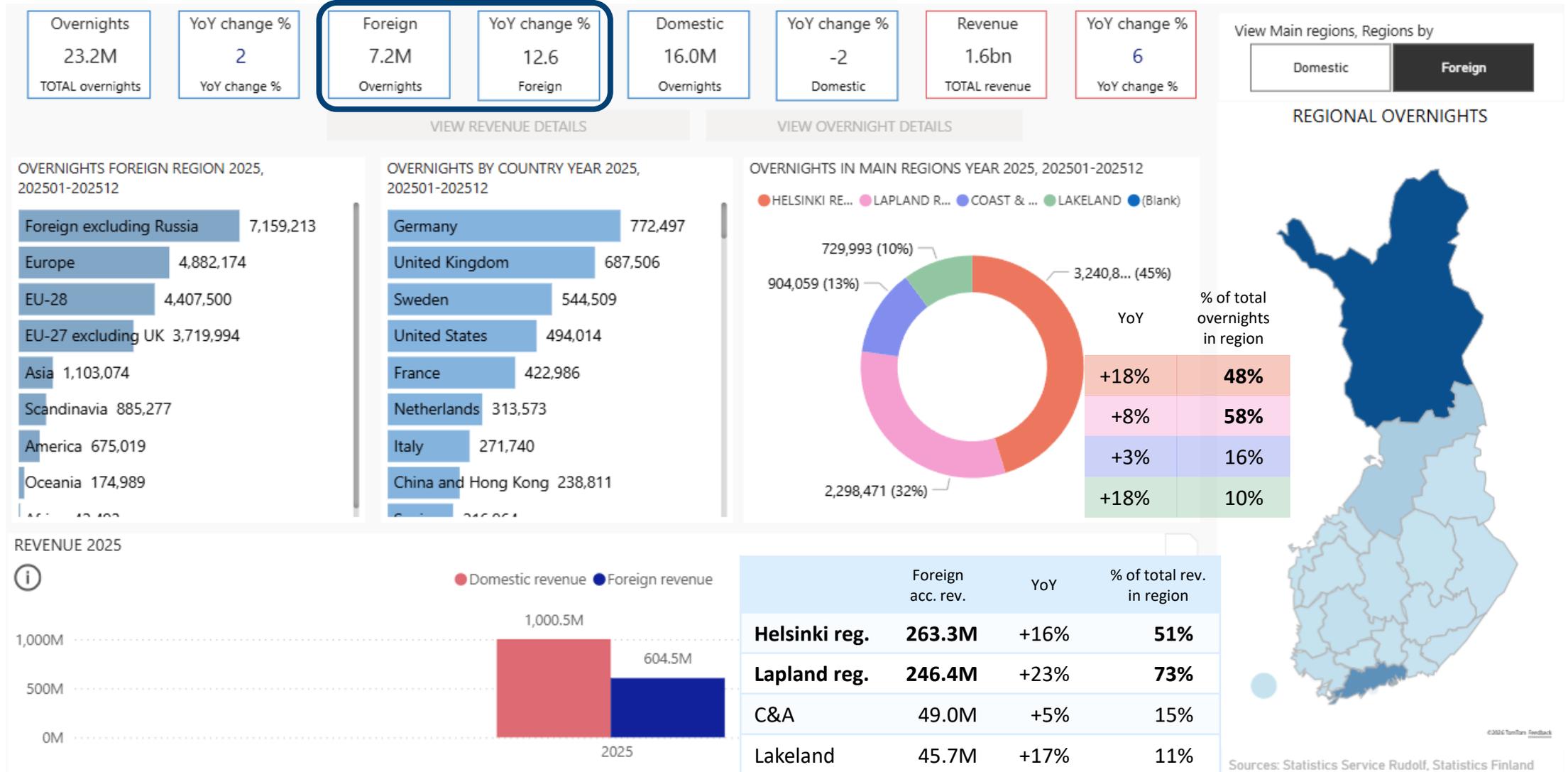
Overnight stays from **all major source markets exceeded** the totals recorded in the previous year.

Compared to year 2019, overnight stays from Sweden (-3%), China including Hong Kong (-46%), Japan (-8%), Estonia (-20%), and Norway (-3%) still lagged behind pre-pandemic levels.



Helsinki and Lapland dominated in 2025

Growth in each of the main regions with foreign overnights and accommodation revenue



REVENUE 2025

	Foreign acc. rev.	YoY	% of total rev. in region
Helsinki reg.	263.3M	+16%	51%
Lapland reg.	246.4M	+23%	73%
C&A	49.0M	+5%	15%
Lakeland	45.7M	+17%	11%

Sources: Statistics Service Rudolf, Statistics Finland

Registered foreign overnights increased by 9% in December

December 2025

987,900 total foreign overnights;
+9% vs. 12/2024, (+25% vs. 12/2019)

986,500 foreign excl. Russia; +9%, (+38%)

645,600 EU+UK; +10%, (+37%)

42,500 Scandinavia; +17%, (17%)

155,200 Asia; +7%, (+10%)

66,800 America; +16%, (+141%)

Top destinations for total foreign;
vs. 12/2024, (vs. 12/2019)

- **226,600 Helsinki**; +20%, (+25%)
- **158,000 Rovaniemi**; +8%, (+36%)
- **104,500 Inari-Saariselkä**; +16%, (+30%)
- **96,100 Kittilä-Levi**; +5%, (+45%)
- 56,200 Ruka-Kuusamo; +17%, (+58%)
- 49,000 Kolari-Ylläs; +6%, (+10%)
- 44,700 Vantaa; +9%, (+42%)
- 35,700 Sodankylä; -7%, (+12%)
- 21,200 Pelkosenniemi; -1%, (+332%)
- 21,100 Enontekiö; +15%, (+74%)
- 21,100 Muonio; -4%, (-9%)

Top source markets, total foreign; vs. 12/2024

OVERNIGHTS 2025 compared to 2024 months 12-12

Growth
vs. 12/2019

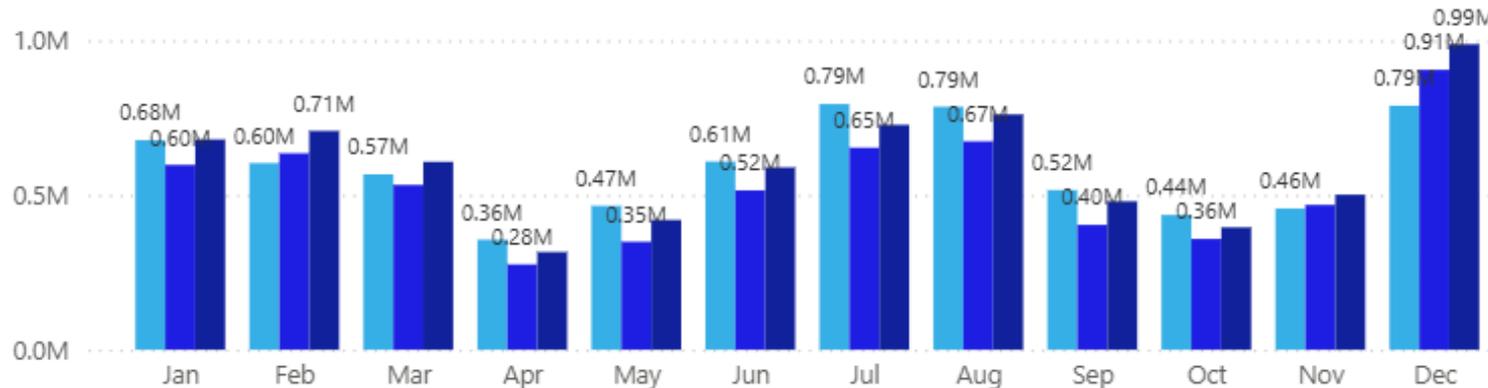
● MAX year ● MIN year



British visitors accounted for **27%** of all registered foreign overnight stays in Finland during December, with **91%** of these occurring in the Lapland region.

FOREIGN OVERNIGHTS

● 2019 ● 2024 ● 2025



Registered foreign overnights increased by 3% in January

January 2026

702,500 total foreign overnights;
+3% vs. 01/2025

453,800 EU+UK; +3%

47,800 Scandinavia; +15%

103,900 Asia; +2%

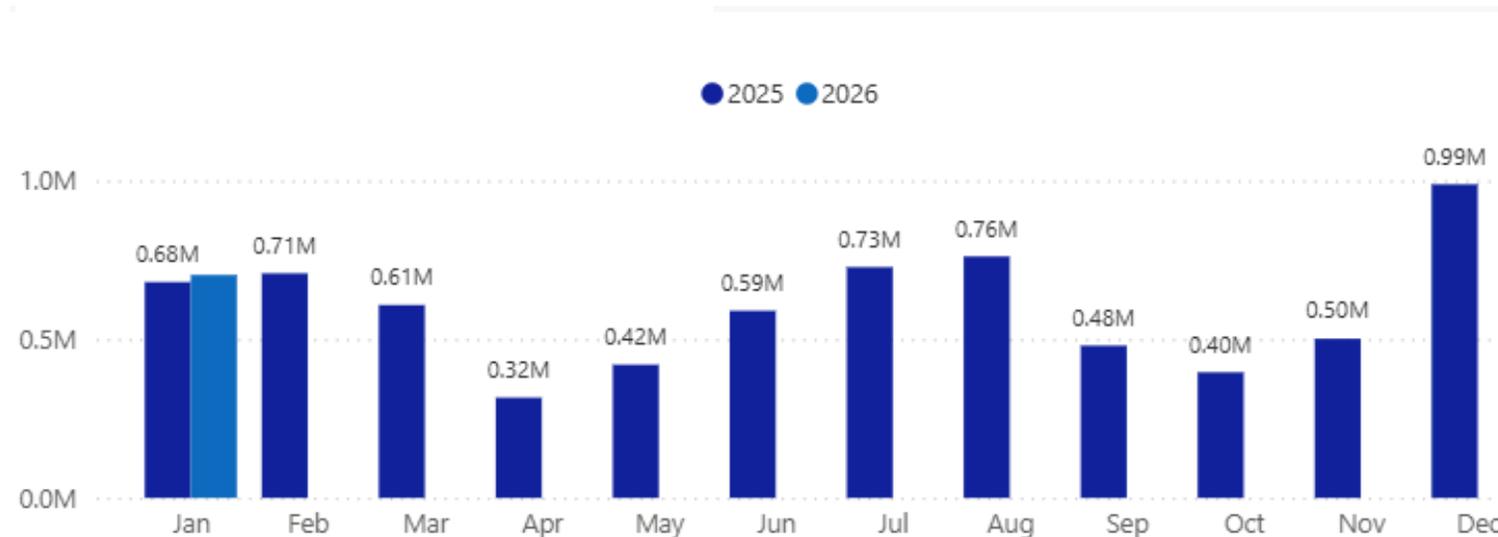
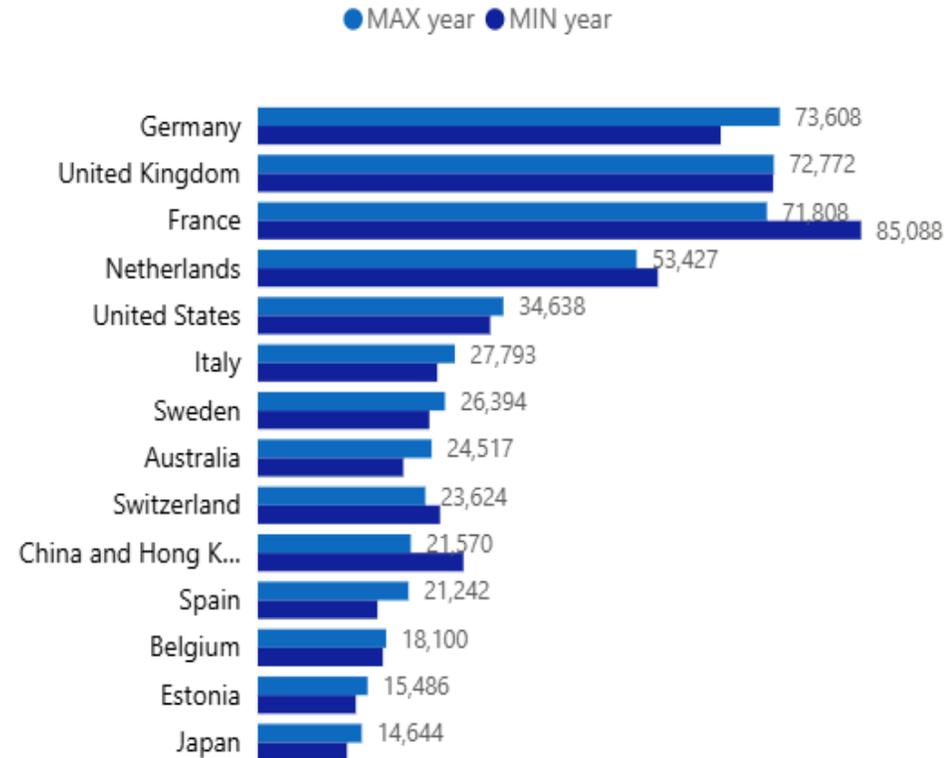
54,100 America; +14%

Top destinations for total foreign;
vs. 01/2025

- **149,500 Helsinki; +8%**
- **115,400 Rovaniemi; +7%**
- **65,000 Inari-Saariselkä; +7%**
- **62,900 Kittilä-Levi; +3%**
- 39,500 Kolari-Ylläs; **-11%**
- 39,400 Vantaa; **+1%**
- 39,400 Ruka-Kuusamo; **+3%**
- 22,800 Sodankylä; **-12%**

Top source markets, total foreign; vs. 01/2025

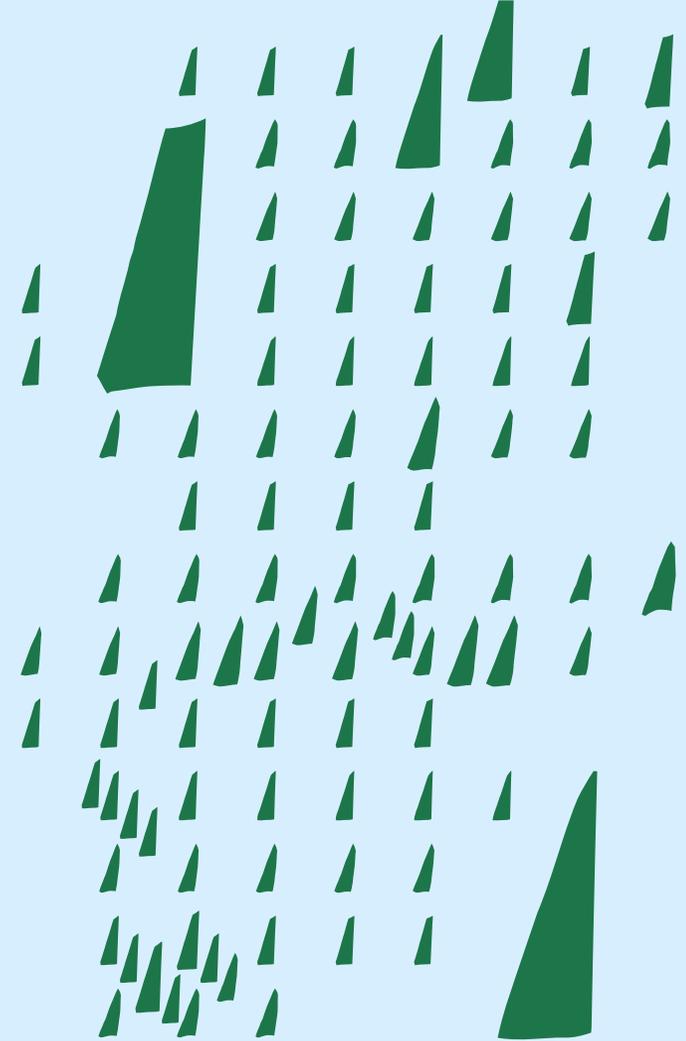
OVERNIGHTS 2026 compared to 2025 months 1-1



Registered overnights in the Nordics

Year 2025

- The Nordic region **experienced good growth** in **registered foreign overnight stays** in 2025, reaching nearly **53 million** and **growing by 11%** compared to 2024. Among the four Nordic countries (SE, DK, NO, FI), **Finland's share** of the foreign overnights was **13%** (Denmark and Sweden having both a 32% and Norway 23% share).
- **Germany** was clearly the biggest source market, and their overnights have increased in each of the four Nordic countries compared to the previous year.
- Beside Germany, overnights increased to each of the Nordic country from **the US, the Netherlands, Sweden, Denmark, France, Switzerland, Finland, Spain, China, and Belgium** among the main source markets.

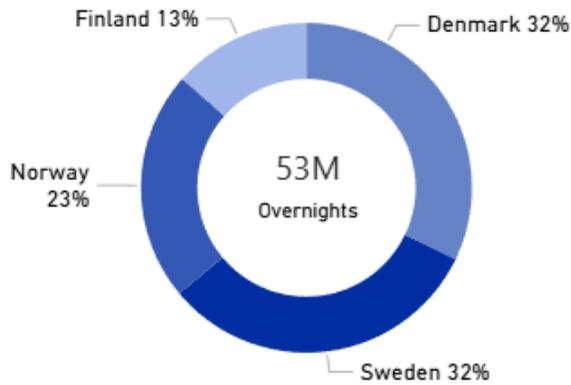


Foreign overnights in the Nordics (excl. Iceland) 2019 - 2025

Select year for shares

Share of overnights

WHOLE COUNTRY Foreign 1.1.2025-31.12.2025

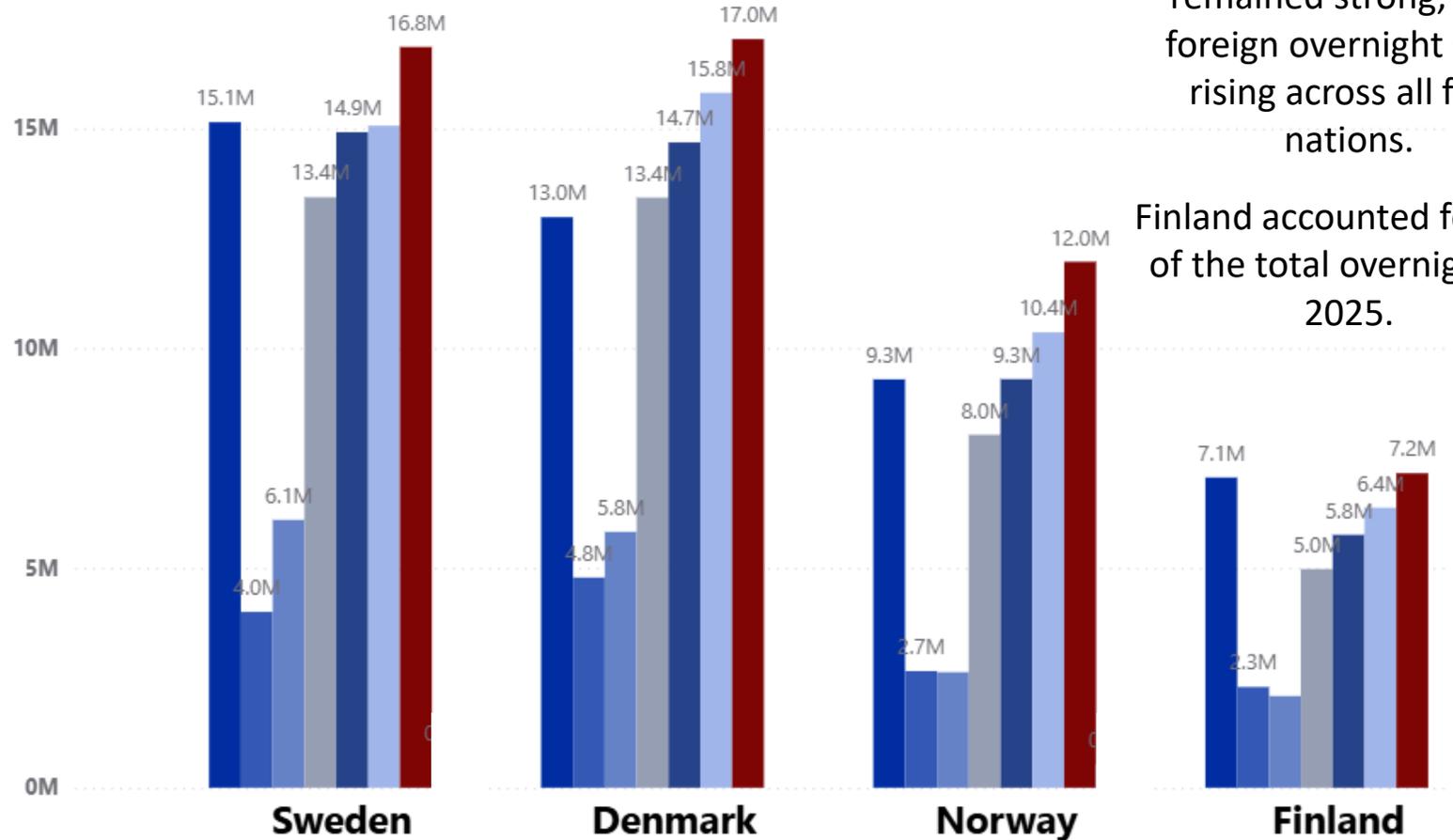


Year	Overnights	YoY change %
2025	52,993,218	11 %
2024	47,590,063	7 %
2023	44,633,737	12 %
2022	39,854,673	140 %
2021	16,625,848	21 %
2020	13,725,626	-69 %
2019	44,459,882	5 %

Overnights in the Nordic countries

WHOLE COUNTRY Foreign

● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025



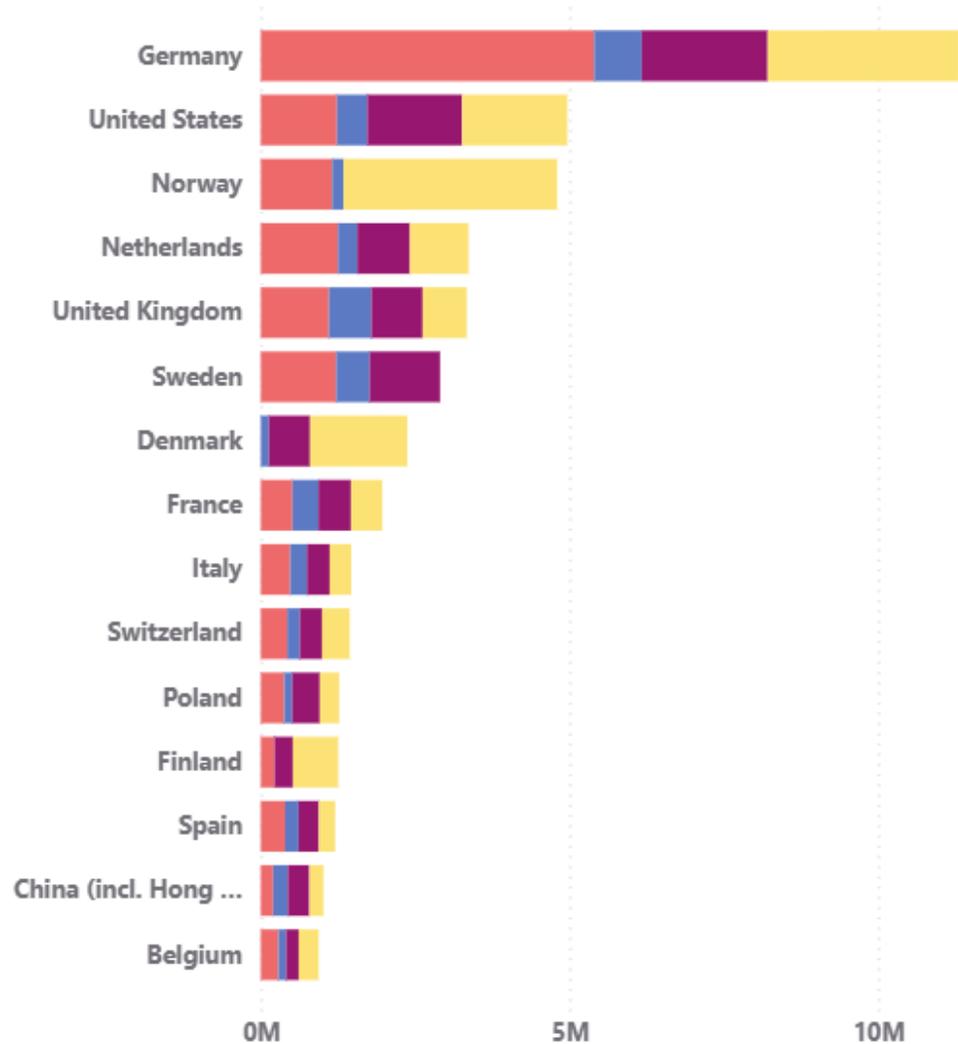
In 2025, interest towards the Nordic countries remained strong, with foreign overnight stays rising across all four nations.

Finland accounted for 13% of the total overnights in 2025.

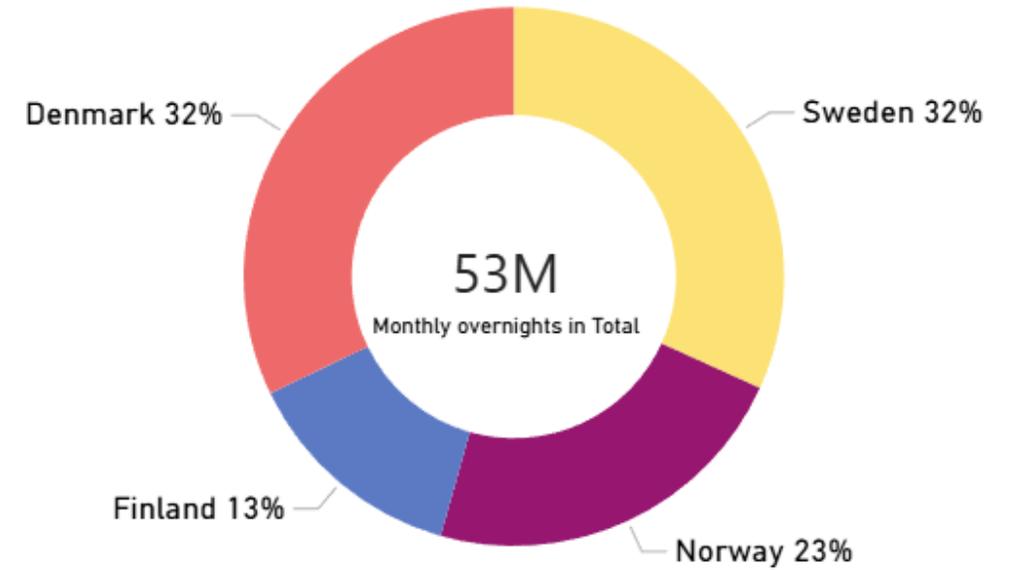
Foreign overnights in the Nordics (excl. Iceland) Year 2025

Nordic countries' top target markets

WHOLE COUNTRY Foreign 1.1.2025-31.12.2025



WHOLE COUNTRY Foreign 1.1.2025-31.12.2025



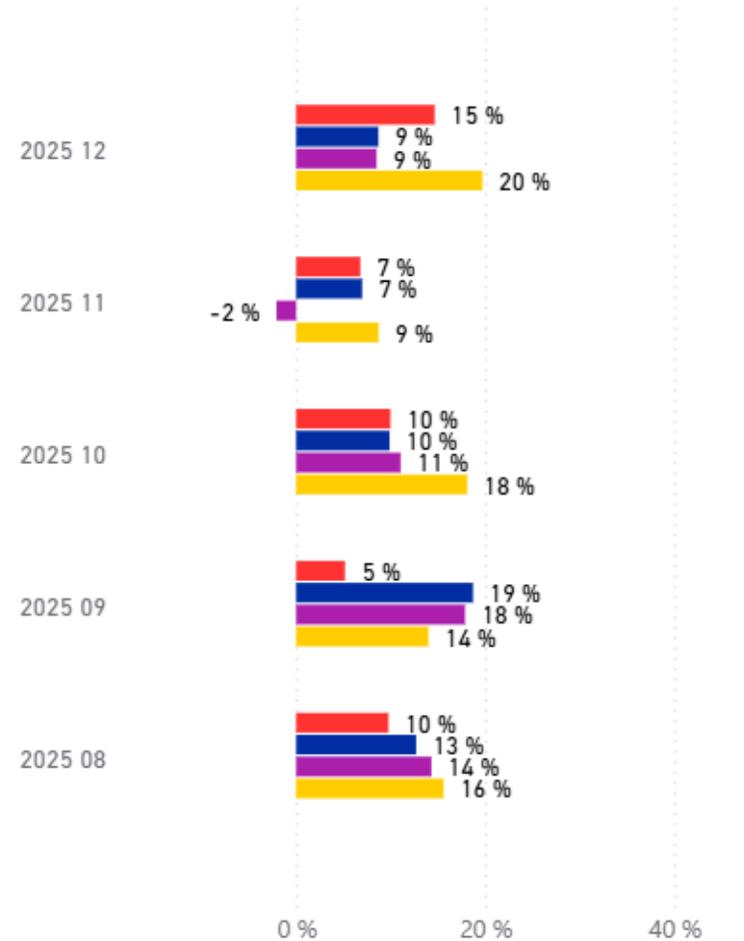
Nordics	Monthly	YoY change %
Denmark	17,027,185	8 %
Sweden	16,848,724	12 %
Norway	11,964,019	16 %
Finland	7,153,290	12 %
Total	52,993,218	11 %

Monthly overnights in the Nordics (excl. Iceland) Year 2025

YoY change %

WHOLE COUNTRY Foreign 1.1.2025-31.12.2025

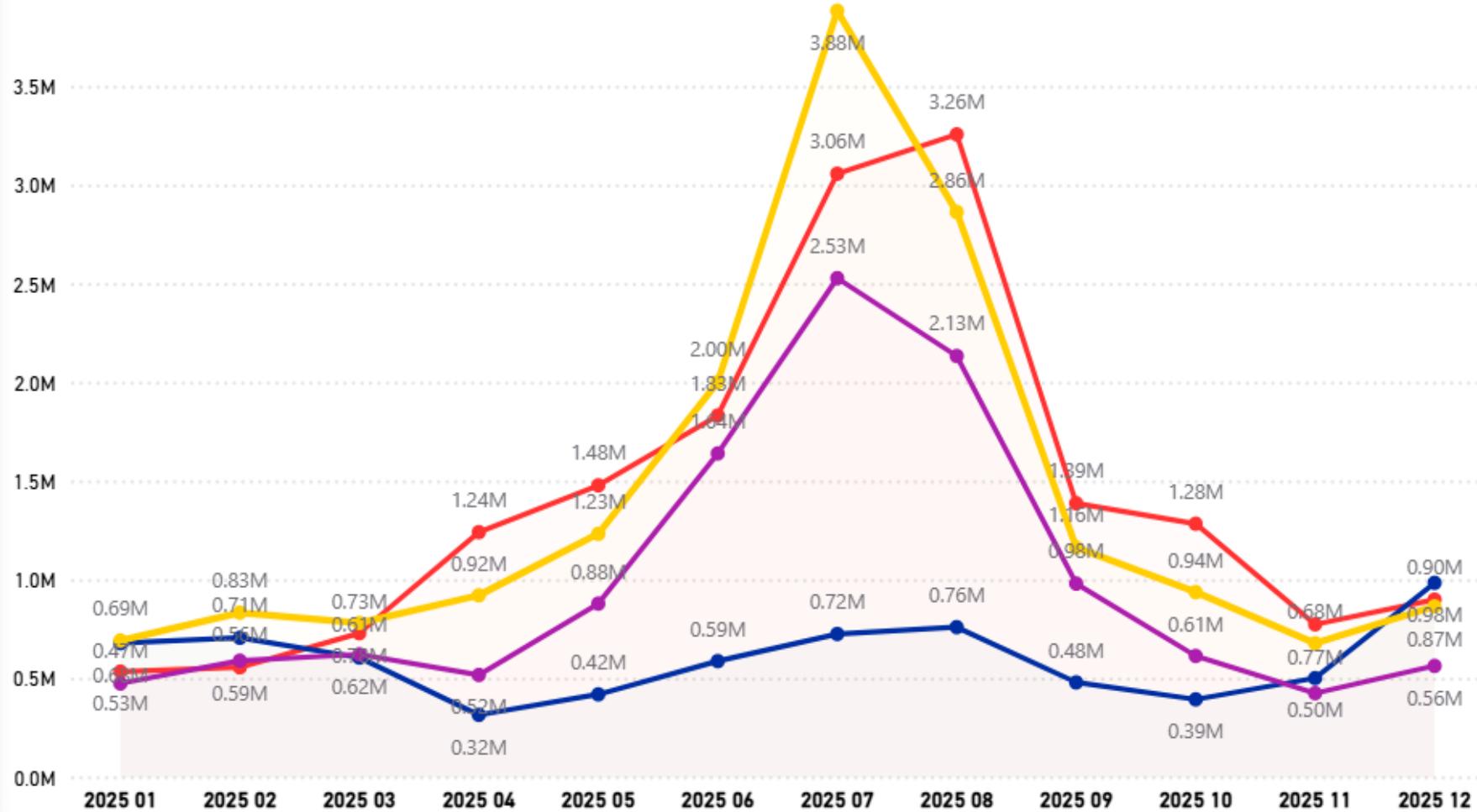
● Denmark ● Finland ● Norway ● Sweden



Monthly overnights

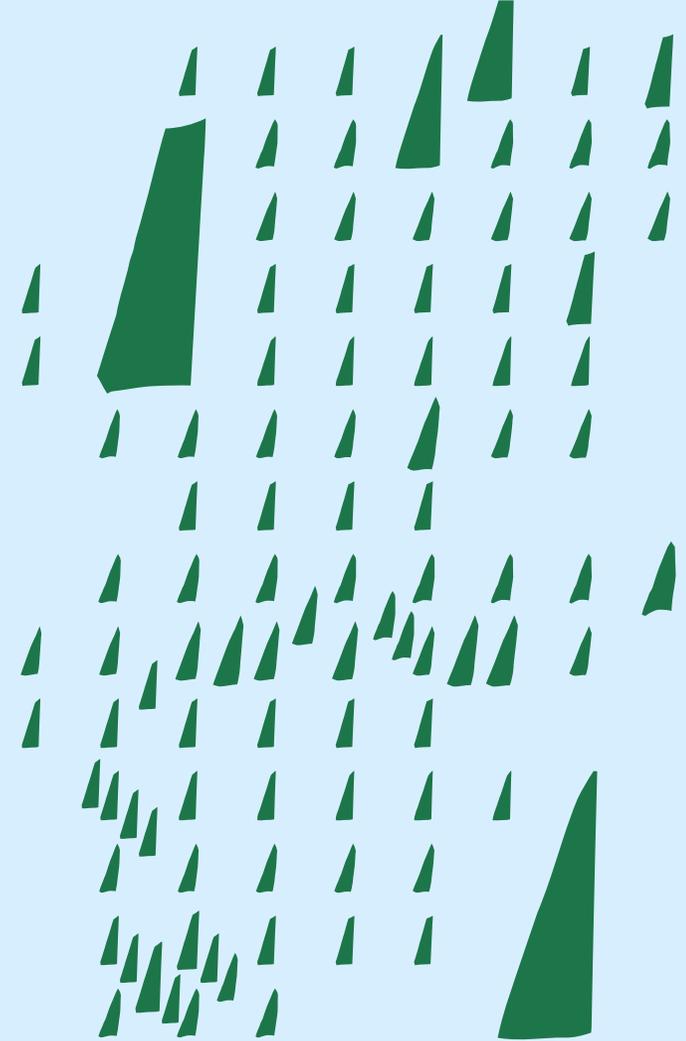
WHOLE COUNTRY Foreign 1.1.2025-31.12.2025

● Denmark ● Finland ● Norway ● Sweden



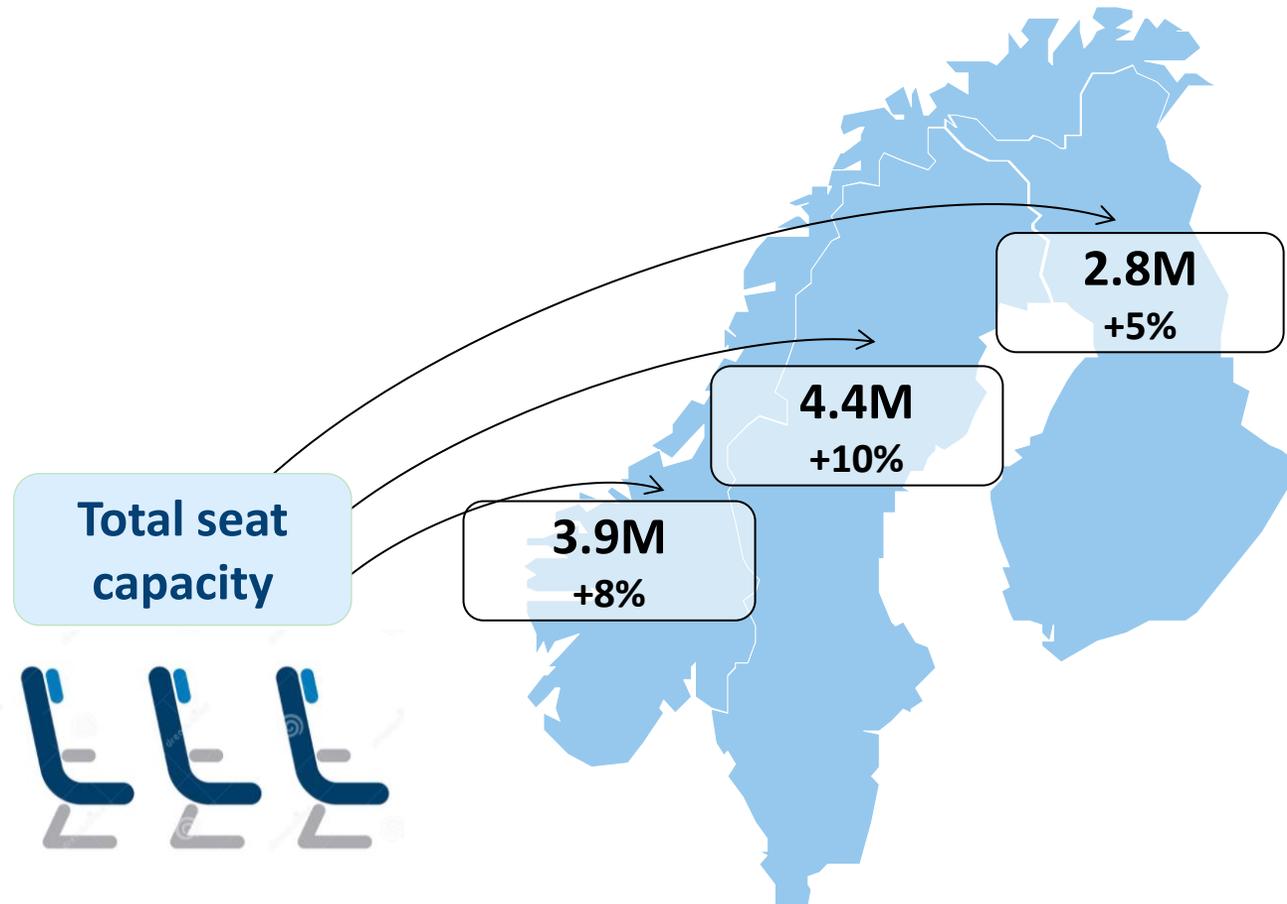
International Flight Seat Capacity March – May 2026

- Overall int'l seat capacity to Finland during the spring season is showing a 5% increase compared to last spring.
 - However, there will be less flights and lower seat capacity from London (LHR) to Helsinki by Finnair, from Paris (CDG) to Helsinki by Air France, and from Dallas (DFW), Chicago (ORD), Los Angeles (LAX), and Seattle (SEA) to Helsinki compared to last spring.
 - 93% of the total seat capacity to Finland will be available on direct flights to Helsinki.
- Overall int'l seat capacity will also increase to Sweden (+10%) and to Norway (+8%) compared to last spring.



Total Seat capacity to FI, SE & NO for spring (Mar-May) **2026**

Comparison to previous spring



Database update 28-Feb

Int'l seat capacity to Finland for Mar-May 2026

Comparison to previous spring

✈ Worldwide (excl. domestic) → Finland

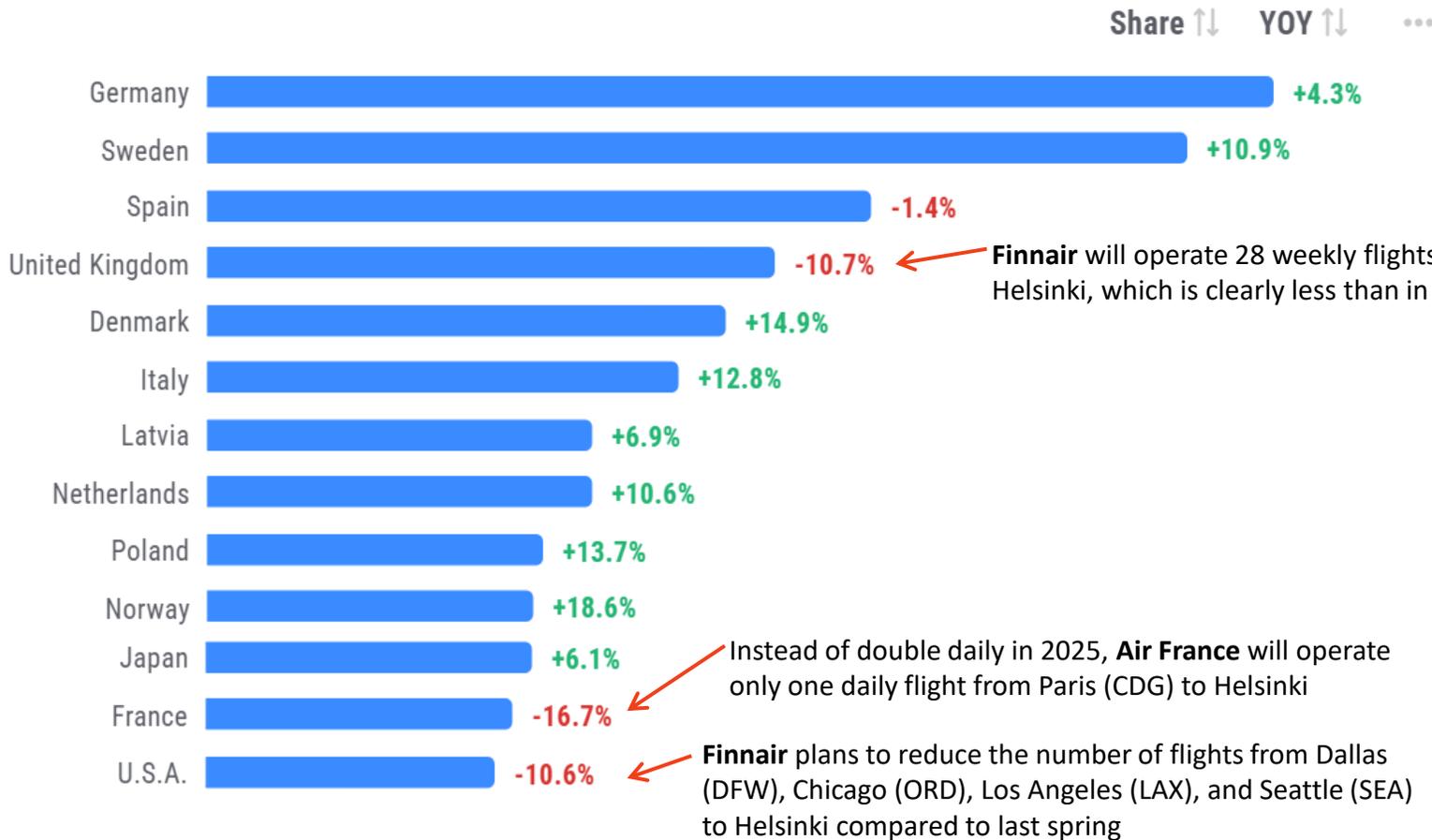
Database update 28 Feb

Filtered period 01 Mar 2026 - 31 May 2026

49 countries

+5.4% YOY for selected locations

Mar-May 2026
 Total seat capacity to whole Finland 2.8M
 Seat capacity to Helsinki 2.6M (93% of total)



Database update 28-Feb

Int'l seat capacity to Sweden for Mar-May 2026

Comparison to previous spring

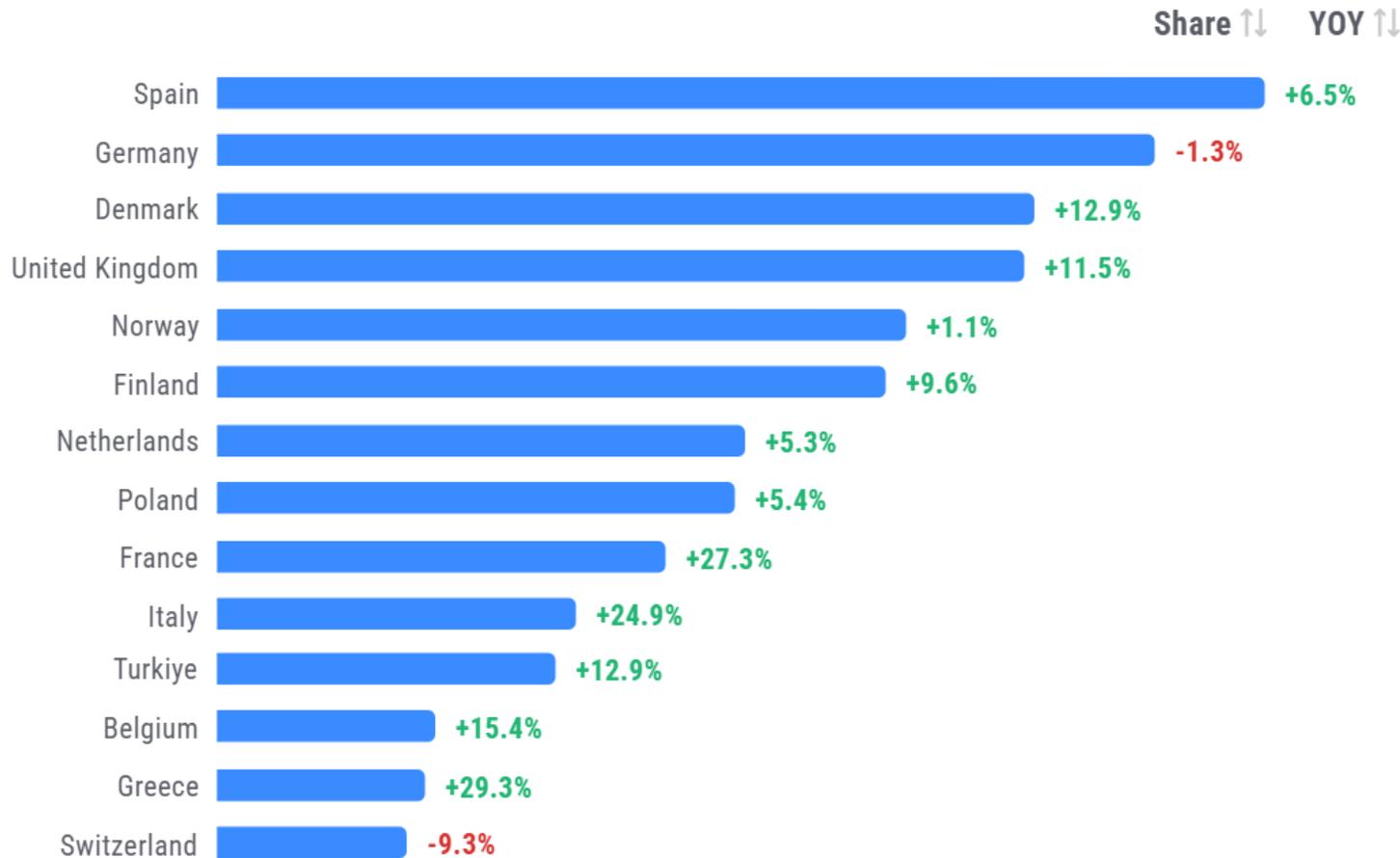
✈ Worldwide (excl. domestic) → Sweden

Database update 28 Feb

Filtered period | 01 Mar 2026 - 31 May 2026

49 countries

+9.9% YOY for selected locations



Mar-May 2026
Total seat capacity to whole Sweden **4.4M**
Seat capacity to **Stockholm** **3.4M** (78% of total)

Database update 28-Feb

Int'l seat capacity to Norway for Mar-May 2026

Comparison to previous spring

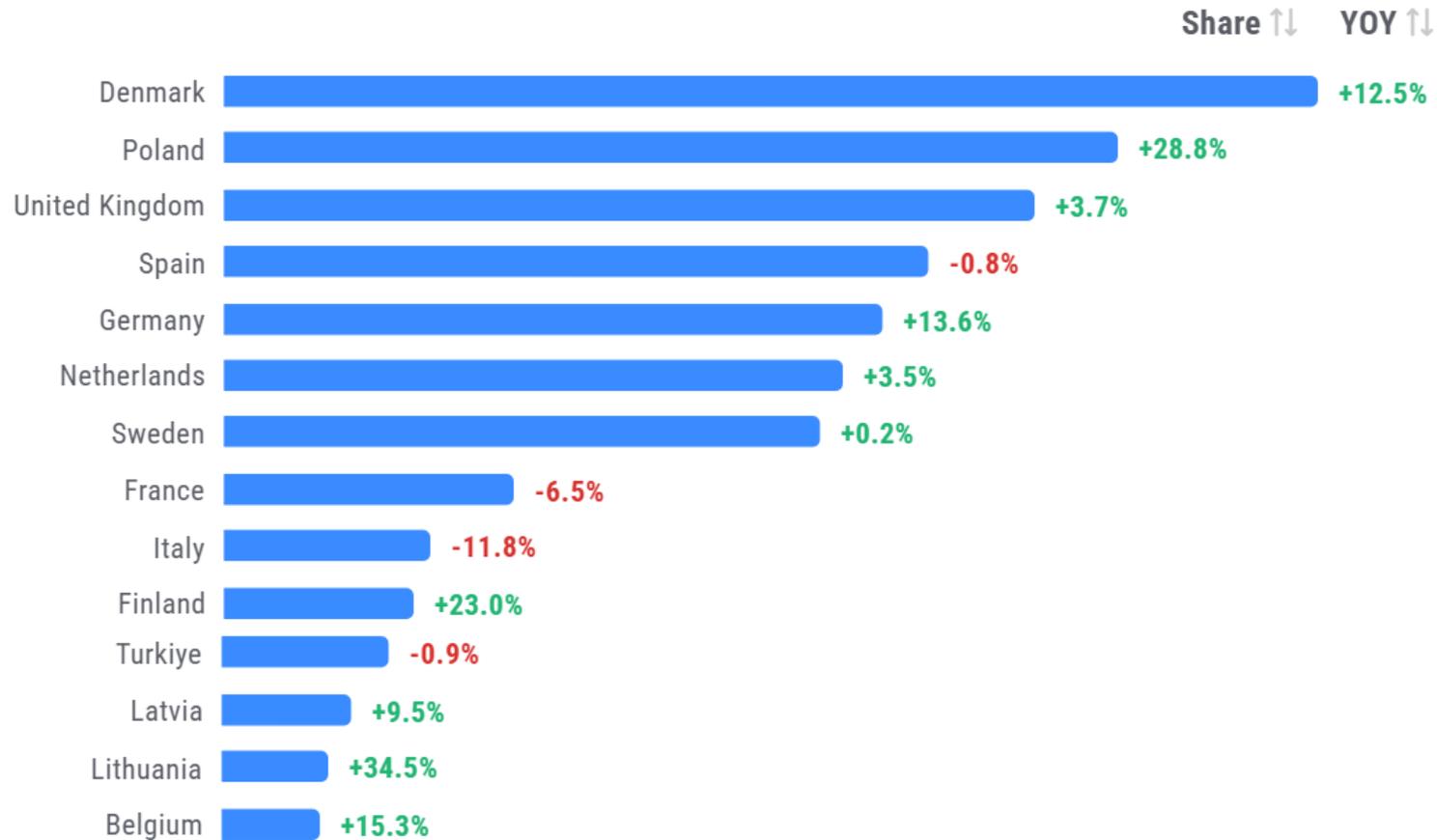
✈ Worldwide (excl. domestic) → Norway

Database update 28 Feb

Filtered period | 01 Mar 2026 - 31 May 2026

45 countries

+7.5% YOY for selected locations



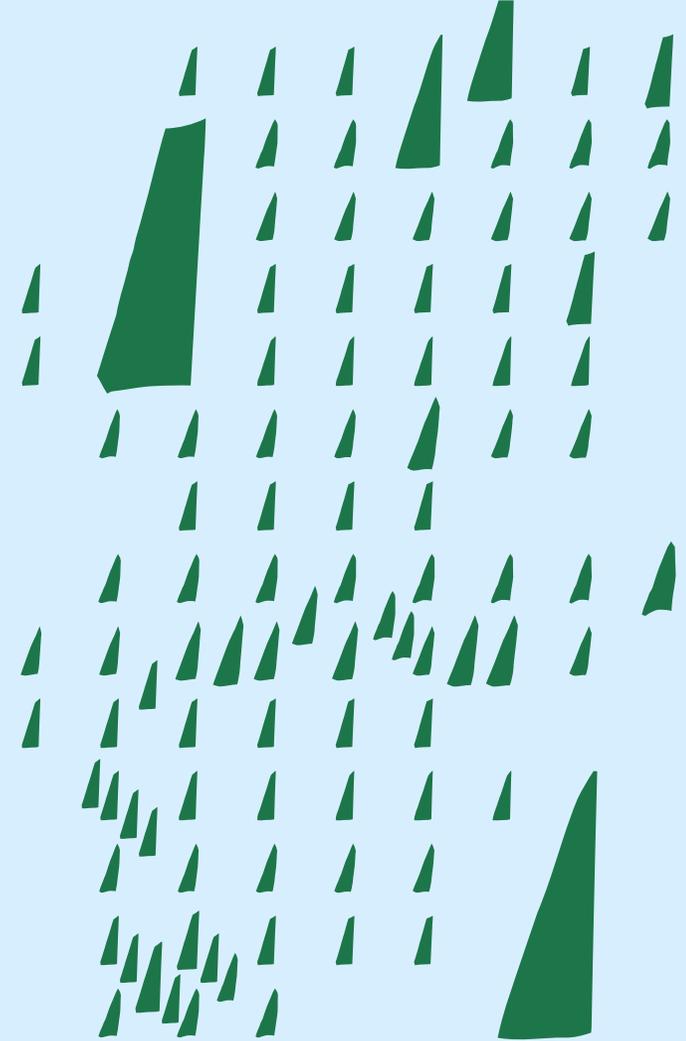
Mar-May 2026
 Total seat capacity to whole Norway **3.9M**
 Seat capacity to **Oslo** **2.8M** (72% of total)

Database update 28-Feb

Forecast for Flight Arrivals

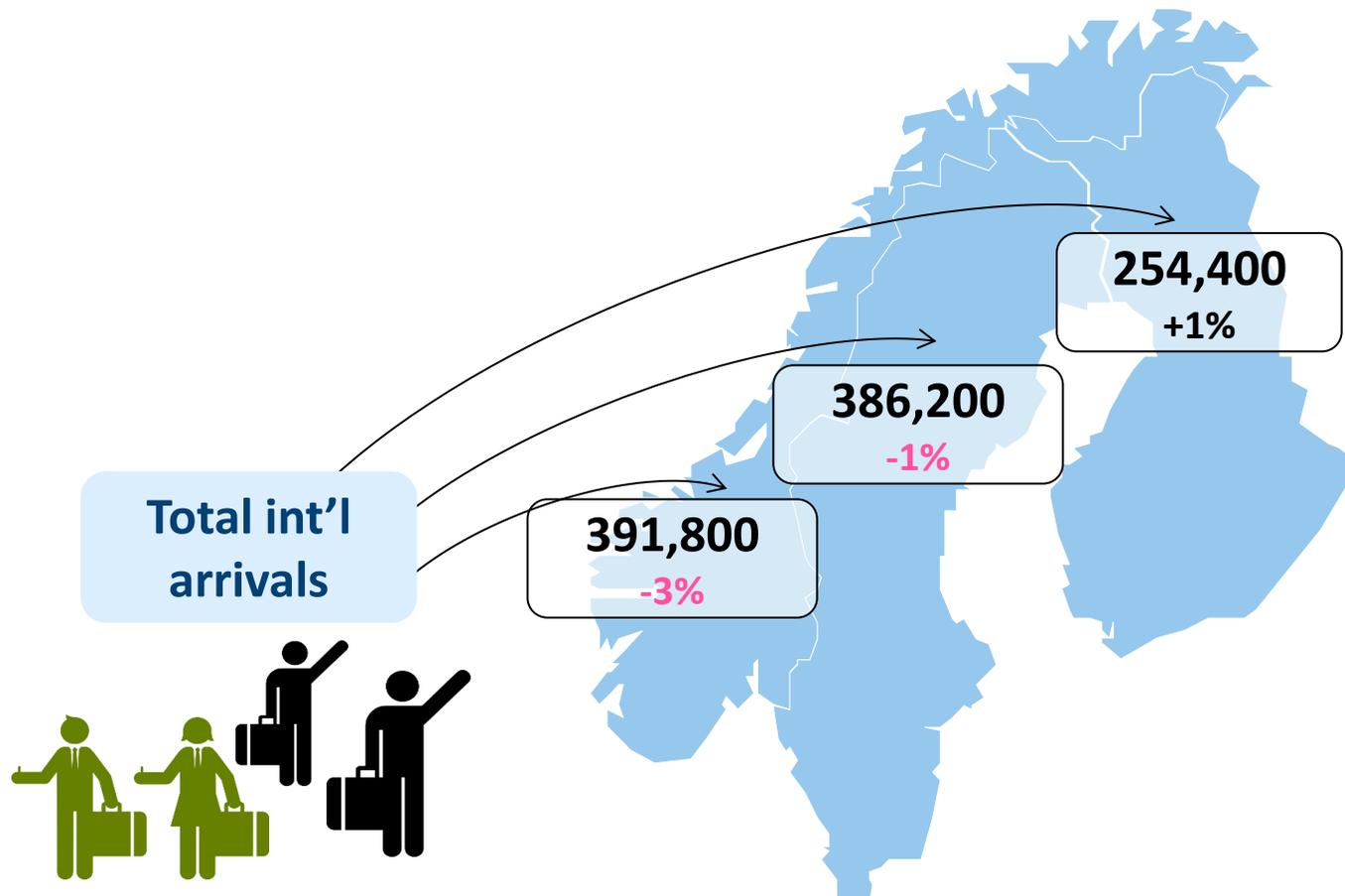
March – May 2026

- The forecast for total international flight arrivals to Finland during the spring season 2026 indicates a slight increase compared to last spring.
 - Main source market for spring flight arrivals to Finland are **Germany, Sweden, and the UK**.
 - **Helsinki, Turku, Vaasa, and Kuusamo** are projected to surpass the number of flight arrivals of last spring.
- Flight arrivals both to Sweden and to Norway are anticipated to decrease slightly compared to last spring. **Germany** and the **UK** are among the biggest source markets also to Sweden and Norway.



Forecast of total int'l arrivals* to FI, SE & NO spring (Mar-May) 2026

Comparison to previous spring



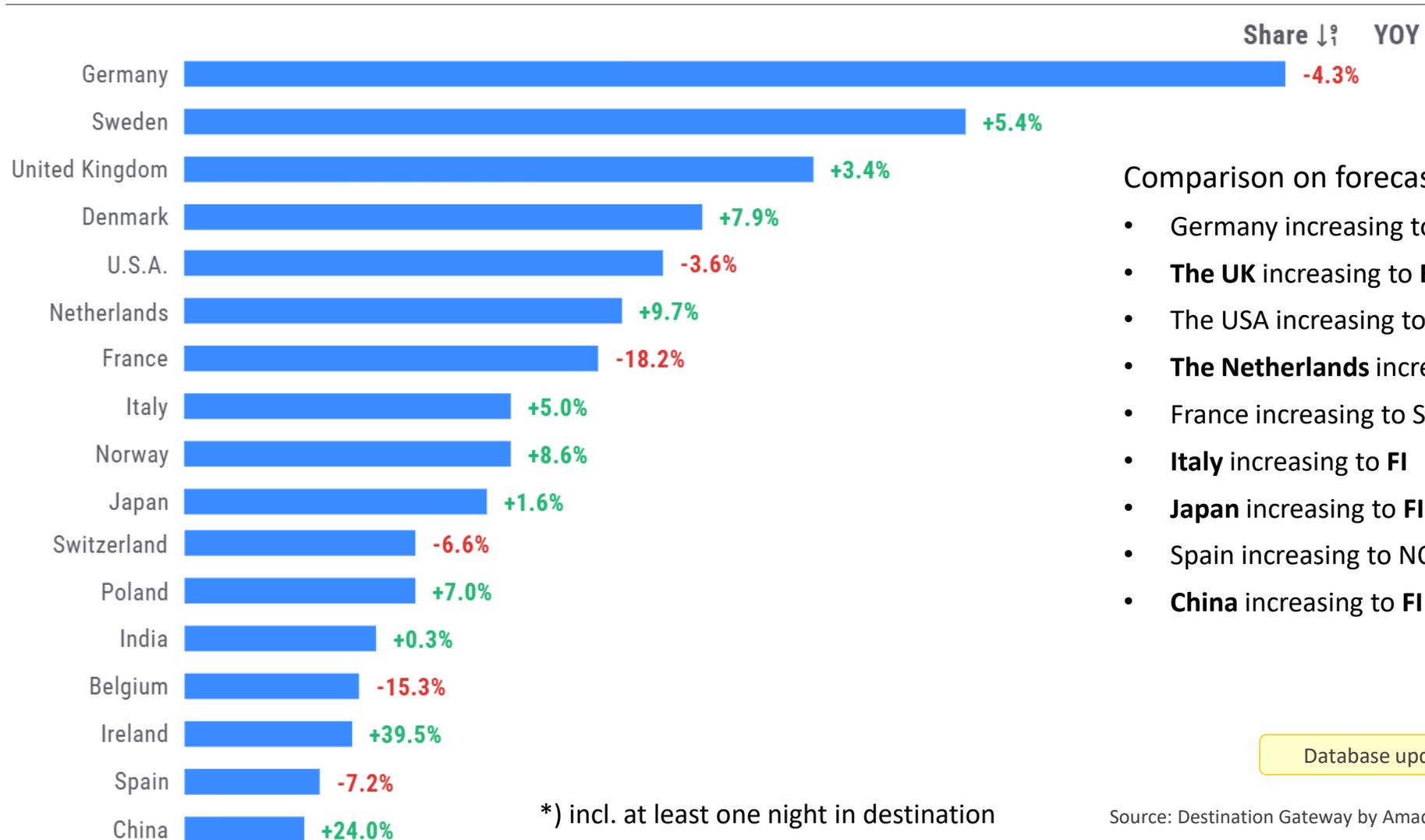
Database update 01-Mar

Forecast of Flight arrivals* in Finland in Mar-May 2026

Comparison to previous spring

254,442 tourist arrivals

+1.4% YOY for selected origins



Comparison on forecasts to FI, SE, NO

- Germany increasing to NO
- **The UK** increasing to FI & SE
- The USA increasing to SE
- **The Netherlands** increasing to FI
- France increasing to SE
- **Italy** increasing to FI
- **Japan** increasing to FI
- Spain increasing to NO & SE
- **China** increasing to FI

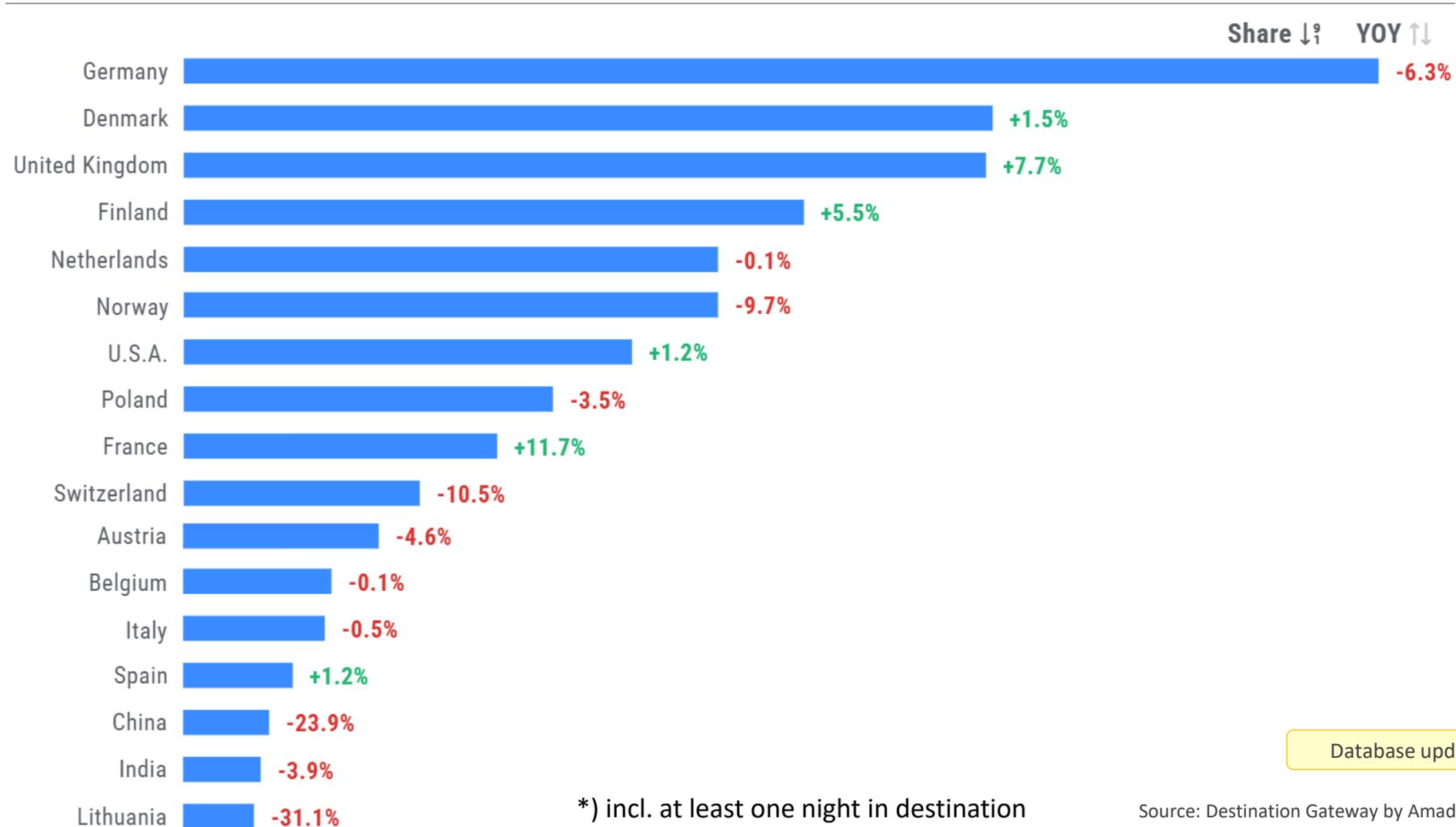
Database update 01-Mar

Forecast of Flight arrivals* in Sweden in Mar-May 2026

Comparison to previous spring

386,203 tourist arrivals

-1.4% YOY for selected origins



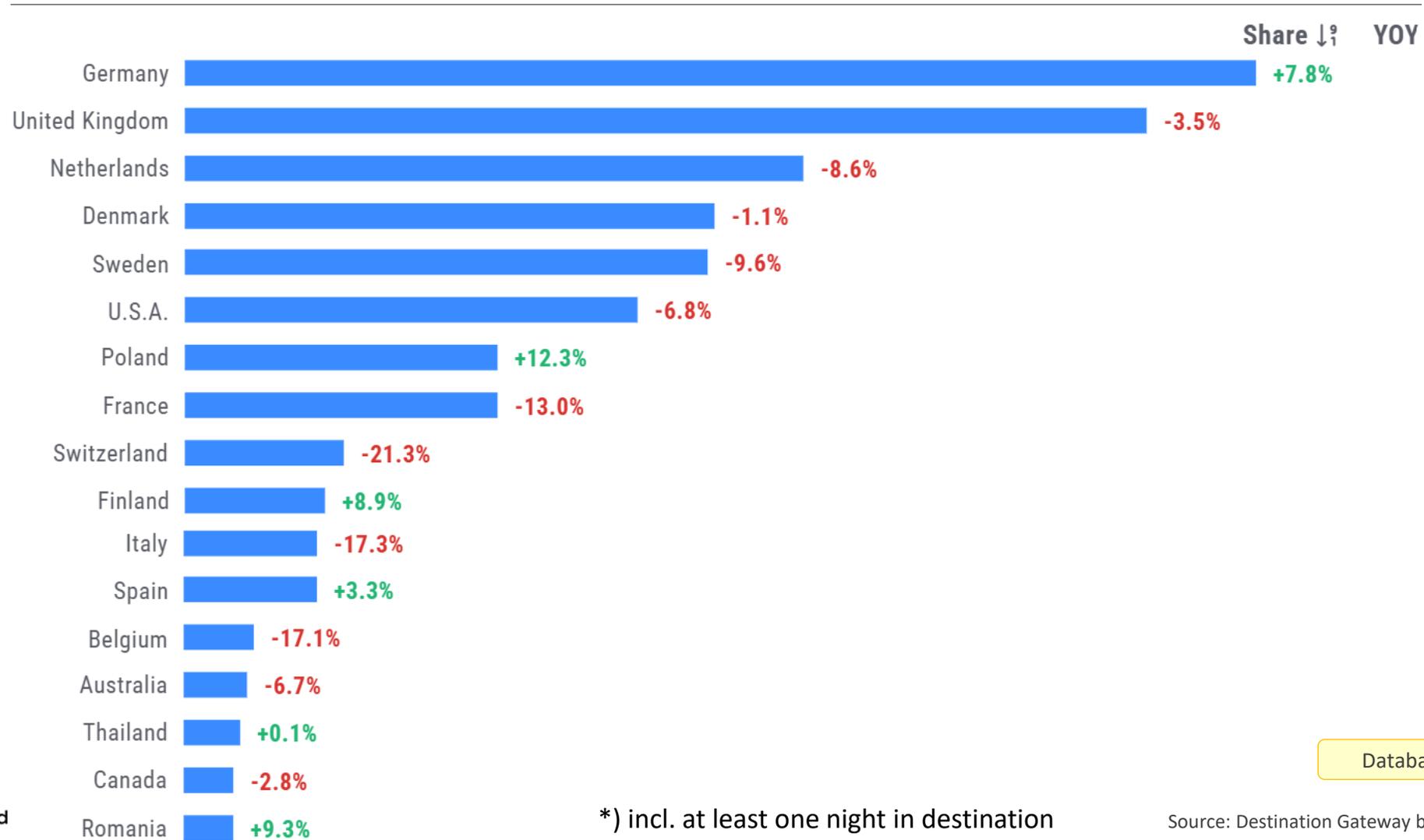
Database update 01-Mar

Forecast of Flight arrivals* in Norway in Mar-May 2026

Comparison to previous spring

391,832 tourist arrivals

-3.1% YOY for selected origins



Database update 01-Mar

Forecast for total int'l arrivals* to Finnish airports during Mar-May 2026

FINLAND

254,442 tourist arrivals **+1.4%** YOY

*) incl. at least one night in destination

Arrival destination	Forecast of Arrivals* Mar-May 2026	Share of int'l arrivals	Change vs. Mar-May 2025	Main source markets Mar-May 2026
Helsinki	189,000	74%	+2%	DE, SE, DK, US, UK
Rovaniemi	30,300	12%	-1%	UK, IT, DE, FR, IE
Kittilä	12,500	5%	-14%	DE, NL, FR, CH
Turku	4,900	2%	+38%	PL, RO, SE, LT, DK
Ivalo	4,800	2%	-9%	DE, FR, NL, UK
Vaasa	4,200	2%	+61%	SE, DE, DK
Oulu	2,500	1%	-13%	DE, SE
Kuusamo	2,400	1%	+6%	DE

Forecast of the number of arrivals* is less than 1,000 pax:
 Kuopio, Tampere, Joensuu, Kajaani, Jyväskylä, Kemi/Tornio,
 Kokkola/Pietarsaari, Mariehamn, and Pori

Database update 01-Mar

