



# **Air-based package holidays in 2023**

**Compiled by Association of Finnish Travel Industry**



ASSOCIATION OF THE FINNISH TRAVEL INDUSTRY  
Vilhonkatu 4 B  
00100 HELSINKI

## Number of air-based package holidays still on strong growth path in 2023 - Greece by far the most popular destination

*The war in Europe in February 2022, the resulting energy and economic crisis and the last vestiges of the pandemic continued to bring uncertainty to the tourism year. However, the trend has been clearly for the better.*

The Association of Finnish Travel Industry (SMAL) has compiled the traditional package travel<sup>1</sup> statistics, featuring air-based packages from Finland to international destinations in 2023 sold by its member companies. In total, almost 676,000 packages were sold, which represents an increase of around 31% compared to 2022. Compared to the pre-pandemic period, the backlog was still around 23 %. In 2023, the combined turnover of tour operators organizing air-based travel packages was EUR 686.9 million euro, an increase of 38.8 % compared to the previous year. In 2019, the corresponding figure was EUR 755.6 million, meaning that the monetary decrease in 2023 compared to the pre-pandemic period was only 9.1 %.

The vast majority, 82.7%, of the packages were to Europe. Among the **European** destinations, Greece confirmed its position as the most popular destination with just under 230,000 packages, representing around 41% of all trips to the region. The growth in Greek travel compared to 2022 was 24.2 %, and the 2019 figures were just over 4 % away. The second favorite destination for Finns was Spain, with just over 180,000 packages made there. This represented 32.3 % of all trips to Europe. The Canary Islands accounted for the majority of packages in Spain, with over 146 000 packages. Compared to 2022, tourism to Spain grew by 25.8 %. Compared to 2019, Spanish tourism is still 22.4 % behind the pre-pandemic figures.

More than 68 000 trips were made to destinations in **the Middle East and North Africa**, which represented just over 10 % of all trips recorded. Sales to destinations in the Middle East and North Africa increased sharply by 41.4 % compared to 2022, although there was still a decline of around 39 % compared to 2019. Turkey is a firm favorite of Finns in the region, with nearly 56,000 packages in 2023, accounting for 81.6 % of total sales in the region. After a few years, Egypt became the second most popular destination in the region with just under 5 600 packages. The UAE attracted around 3 600 package buyers.

Some 49 000 trips were made to **long haul destinations**, an increase of around 96 % compared to 2022. The drop in sales to long haul destinations was still around 43 % of the 2019 package volume. The most popular of the long haul destinations, with just over 24,000 packages, was Thailand, which has traditionally been a high-volume winter destination. Although Thailand's figures multiplied from the previous year, it was still around 35 % behind the pre-pandemic figures. Cape Verde, with around 9 100 trips, or 18.6 % of the region's total, is the second most popular long haul destination.

The popularity of long international cruises was growing well among Finns before the pandemic, and after a few quiet years, cruise interest is clearly on the rise again. In 2023, nearly 6 600 cruise packages were sold. The majority of these trips were on European cruises. Compared to 2022, cruise sales grew by 74.6 % and fell by a further 19 % compared to 2019. It should be noted, however, that the above figures are reported by tour operators and do not include the so-called 'self-service' cruises booked by individual passengers.

<sup>1</sup> Herein a travel package is defined as a combination of international travel services coordinated by a tour operator, lasting for at least 2 days and including at least relevant flights and accommodations. The travel package concept defined by the Package Travel Act is broader than the one used here. The statistics do not, therefore, include all those trip types that are included in the Act. Figures also do not include services for accommodations and transportation alone.



### Top 10 list of Destinations in 2023

Order in 2023	Order 2022	Number of passengers
1. Greece	(1.)	229 054
2. Spain	(2.)	180 882
3. Turkey	(3.)	55 800
4. Cyprus	(4.)	26 357
5. Italy	(6.)	24 841
6. Thailand	(10.)	24 425
7. Portugal	(5.)	19 108
8. Croatia	(7.)	13 437
9. Cape Verde	(8.)	9 127
10. Austria	(9.)	8 474

### On the statistics

SMAL and its predecessor SMY have gathered statistics on package travel since 1965. The travel industry has changed considerably since those times. The package travel concept has changed forms over the years and traditional package travel holidays are more and more frequently joined by flight+hotel or similar arrangements that are booked online. These are also considered package travel. Travelers increasingly also book their own tailor-made trips according to their own desires. These trips are now more often included in the statistics on package travel as well, since 2018 legislation on package travel added other types of travel to the statistics as well. A majority of the figures are based on the sales of package travel holidays that are produced serially. For this reason, popular European city destinations, for instance, are not represented in the correct proportion in the statistics.

Additional information: CEO Heli Mäki-Fränti, SMAL tel. +358 9 4133 3550

Attachment: - flight-based holiday packages in 2023, 2022 and 2019



**Air-based package holidays abroad in 2023**  
(including tailor made packages and long haul cruises with/without flights)

Association of Finnish Travel Industry | Compiled 9.1.2024

	2023	2022	2019	Change 2023/2022 %	Change 2023/2019 %
<b>EUROPE</b>	<b>558 839</b>	<b>444 742</b>	<b>683 531</b>	<b>25,7 %</b>	<b>-18,2 %</b>
Greece	229 054	184 476	239 448	24,2 %	-4,3 %
Spain	180 882	143 822	233 054	25,8 %	-22,4 %
<i>Canary Islands</i>	146 320	120 229	193 053	21,7 %	-24,2 %
<i>Rest of Spain</i>	18 628	12 086	19 069	54,1 %	-2,3 %
<i>The Balearic Islands</i>	15 934	11 507	20 932	38,5 %	-23,9 %
Cyprus	26 357	20 533	18 786	28,4 %	40,3 %
Italy	24 841	18 242	32 744	36,2 %	-24,1 %
Portugal	19 108	19 235	24 533	-0,7 %	-22,1 %
<i>Madeira</i>	15 654	17 087	18 194	-8,4 %	-14,0 %
<i>Rest of Portugal including the Azores</i>	3 454	2 148	6 339	60,8 %	-45,5 %
Croatia	13 439	11 867	25 197	13,2 %	-46,7 %
Austria	8 490	8 065	14 092	5,3 %	-39,8 %
United Kingdom	6 072	3 638	6 551	66,9 %	-7,3 %
France	5 985	4 080	5 670	46,7 %	5,6 %
Bulgaria	5 600	*	15 320	*	-63,4 %
Germany	4 820	3 156	7 367	52,7 %	-34,6 %
Latvia	3 891	1 469	3 119	164,9 %	24,8 %
Czech Republic	3 287	2 359	5 377	39,3 %	-38,9 %
Poland	2 174	1 245	6 533	74,6 %	-66,7 %
Iceland	2 003	1 446	2 248	38,5 %	-10,9 %
Netherlands	1 826	746	2 173	144,8 %	-16,0 %
Denmark	1 826	1 397	2 934	30,7 %	-37,8 %
Hungary	1 481	*	3 838	*	-61,4 %
Lithuania	1 226	*	1 309	*	-6,3 %
Ireland	1 068	683	1 622	56,4 %	-34,2 %
Sweden	829	*	691	*	20,0 %
Malta	703	*	2 552	*	-72,5 %
Switzerland	632	532	862	18,8 %	-26,7 %
Rest of Europe	8 447	14 310	22 411	-41,0 %	-62,3 %
Long distance cruises: Europe, the Mediterranean, the Baltic Sea, the Norwegian coast, the North Atlantic (Europe)	4 798	3 441	5 100	39,4 %	-5,9 %
<b>MIDDLE EAST AND NORTH AFRICA</b>	<b>68 389</b>	<b>48 354</b>	<b>112 420</b>	<b>41,4 %</b>	<b>-39,2 %</b>
Turkey	55 820	39 243	69 641	42,2 %	-19,8 %
Egypt	5 595	3 224	15 864	73,5 %	-64,7 %
United Arab Emirates	3 648	3 869	14 789	-5,7 %	-75,3 %
Israel	2 789	1 836	5 167	51,9 %	-46,0 %
Rest of Middle East and North Africa	537	182	6 959	195,1 %	-92,3 %
<b>LONG HAUL DESTINATIONS</b>	<b>48 826</b>	<b>24 956</b>	<b>85 705</b>	<b>95,6 %</b>	<b>-43,0 %</b>
Mexico	3 080	2 588	4 108	19,0 %	-25,0 %
Rest of Caribbean and Central America	678	524	5 699	29,4 %	-88,1 %
Thailand	24 425	7 579	37 700	222,3 %	-35,2 %
Indonesia	634	*	1 229	*	-48,4 %
Rest of South-East Asia	426	563	7 674	-24,3 %	-94,4 %
Cape Verde	9 127	8 825	10 036	3,4 %	-9,1 %
USA	2 027	897	2 712	126,0 %	-25,3 %
Maldives	1 465	1 155	1 786	26,8 %	-18,0 %
Mauritius	1 325	1 076	1 627	23,1 %	-18,6 %
South Korea	874	*	*	*	*
Japan	636	*	867	*	-26,6 %
Other long haul destinations	2 333	1 413	9 241	65,1 %	-74,8 %
Long haul cruises	1 796	336	3 026	434,5 %	-40,6 %
<b>TOTAL ALL DESTINATIONS</b>	<b>676 054</b>	<b>518 052</b>	<b>881 656</b>	<b>30,5 %</b>	<b>-23,3 %</b>

**Participating tour operators 2023:** Aarrematkat Oy, Adrian Matkat Oy, Allied Travel Consultants Oy, Apollomatkat, Aurinkomatkat Oy, Aventours Oy, CWT Finland Oy, Dive Travel Finland Oy, Elämys Group (OK-Matkat, Matka-Agentit, Elämys Sport and Elämys Ski & Active), Golf Tailors Oy, Helin Matkatoimisto Oy, HTE-Tours Oy, Ikaalisten Matkatoimisto Oy, Ingsva Resor-Matkat Ab Oy, Kankaanpään Matkatoimisto Oy – Satalomat, Kokkolan Matkatoimisto Oy, Kon-Tiki Tours Oy, Koonono Matkat Oy, Kristina Cruises Oy, Kymenmatkat Oy, Lomalinja Oy Holiday Tours Ltd, Longitours Oy, Matka Mäkelä Oy, Matkapojat Oy, Matkapörssi, Matkatoimisto Farmimatkat Oy, Matkatoimisto You Travel Oy, Mixx Travel, Olympia Kaukomatkatoimisto, Oy Pelimatkat Finland, Oy Tjäreborg Ab, Pamplemousse Oy, Pohjolan Matka/Pohjolan Turistiauto Oy, SoileTours Oy Ltd, STS Alppimatkat, Suunnistusmatkat Oy, Toiviomatkat Oy, Travel Specialist Group Oy, Travelon Matkat Oy, TUI Finland Oy Ab (incl. Nazar Nordic) and White House EG

**Participating tour operators 2022:** Adrian Matkat, Allied Travel Consultants Oy, Apollomatkat, Aurinkomatkat Oy, Dive Travel Finland Oy, Elämys Group (OK-Matkat, Matka-Agentit, Elämys Sport and Elämys Ski & Active), Golf Tailors Oy, Helin Matkatoimisto Oy, HTE-Tours Oy, Ikaalisten Matkatoimisto Oy, INGSVA Resor-Matkat, Kankaanpään mt Oy – Satalomat, Kokkolan Matkatoimisto Oy, Kon-Tiki Sport Travel Oy, Kon-Tiki Tours Oy, Koonono Matkat Oy, Kouvolan Matkatoimisto Oy, Kristina Cruises Oy, Kymenmatkat Oy, Lakeuden Matkat Oy / Matkapörssi, Lomalinja Oy, Matkapojat Oy, Matkatoimisto Aventura Oy, Matkatoimisto You Travel Oy, Mixx Travel, Olympia Kaukomatkatoimisto, Oy Pelimatkat Finland, Pamplemousse Oy, SoileTours Oy Ltd, STS Alppimatkat, Suunnistusmatkat Oy, Oy Tjäreborg Ab, Toiviomatkat Oy, Travel Specialist Group Oy, Travelon Matkat Oy (OnGolf/OnSail), TUI Finland Oy (incl. Nazar Nordic), Viada Oy and White House EG

**Participating tour operators 2019:** Adrian Matkat, Allied Travel Consultants Oy, Apollomatkat, Aurinkomatkat Oy, Bussi-Manninen Oy, Golf Tailors Oy, Helin Matkatoimisto Oy, HTE-Tours Oy, Ikaalisten Matkatoimisto Oy, Ingves & Svanbäck Ab Oy, Kokkolan Matkatoimisto Oy, Kon-Tiki Tours Oy, Kouvolan Matkatoimisto Oy, Kristina Cruises Oy, Lakeuden Matkat Oy/Matkapörssi, Lomalinja Oy, Matka Mäkelä Oy, Matkapojat Oy, Matkatoimisto Aventura, Matkatoimisto Detur Finland Oy, Matkatoimisto You Travel Oy, Matkavekka, OK-Matkat Oy Ltd, Olympia Kaukomatkat, Oy Jalo Ab, Oy Tjäreborg Ab, Pamplemousse Oy, Ski Unlimited Oy Ltd, STS Alppimatkat, Suomen Matka-Agentit Oy, Suunnistusmatkat Oy, Tabi Unelmamatkat, Toiviomatkat Oy, Travel Specialist Group Oy, Travelon Matkat Oy (OnGolf/OnSail), TUI Finland Oy (incl. Nazar Nordic), Vetikko Travel and White House EG



## Association of Finnish Travel Industry

### Market shares of Finnish package tour operators based on turnover in 2023 and 2022

Data described in this summary relate to the statistics on package travel

	<b>Turnover 2023 (million €)</b>	<b>Percentage of total turnover</b>		<b>Turnover 2022 (million €)</b>	<b>Percentage of total turnover</b>
Aurinkomatkat Oy	241,5 €	35,2 %	Aurinkomatkat Oy	171,5 €	34,7 %
TUI Finland Oy Ab (incl. Nazar Nordic)	172,9 €	25,2 %	TUI Finland Oy Ab (incl. Nazar Nordic)	121,1 €	24,5 %
Oy Tjäreborg Ab	106,8 €	15,5 %	Oy Tjäreborg Ab	80,1 €	16,2 %
Apollomatkat	49,1 €	7,2 %	Apollomatkat	42,6 €	8,6 %
Elämys Group	15,3 €	2,2 %	Elämys Group	12,0 €	2,4 %
STS Alppimatkat	12,0 €	1,7 %	STS Alppimatkat	8,5 €	1,7 %
Olympia Kaukomatkatoimisto	10,5 €	1,5 %	Olympia Kaukomatkatoimisto	5,8 €	1,2 %
Mixx Travel	9,8 €	1,4 %	Mixx Travel	2,1 €	0,4 %
Matkaporjat Oy	8,5 €	1,2 %	Matkaporjat Oy	4,3 €	0,9 %
Helin Matkatoimisto Oy	8,4 €	1,2 %	Helin Matkatoimisto Oy	5,4 €	1,1 %
Others	52,3 €	7,6 %	Others	41,4 €	8,4 %
<b>Total</b>	<b>686,9 €</b>	<b>100,0 %</b>	<b>Total</b>	<b>494,7 €</b>	<b>100,0 %</b>



## Association of Finnish Travel Industry

### Market shares of Finnish package tour operators based on amounts of passengers in 2023 and 2022

Data described in this summary relate to the statistics on package travel

	Passengers in 2023	Percentage of all holidays		Passengers in 2022	Percentage of all holidays
Aurinkomatkat Oy	229 850	34,0 %	Aurinkomatkat Oy	187 011	36,1 %
TUI Finland Oy Ab (incl. Nazar Nordic)	163 496	24,2 %	TUI Finland Oy Ab (incl. Nazar Nordic)	125 228	24,2 %
Oy Tjäreborg Ab	120 659	17,8 %	Oy Tjäreborg Ab	100 033	19,3 %
Apollomatkat	77 774	11,5 %	Apollomatkat	52 968	10,2 %
Elämys Group	11 606	1,7 %	Elämys Group	8 500	1,6 %
Mixx Travel	11 600	1,7 %	Mixx Travel	2 750	0,5 %
Matkaporjat Oy	8 276	1,2 %	Matkaporjat Oy	4 619	0,9 %
Aventours Oy	7 990	1,2 %	Aventours Oy	<i>new</i>	*
STS Alppimatkat	7 500	1,1 %	STS Alppimatkat	7 000	1,4 %
Ikaalisten Matkatoimisto Oy	4 316	0,6 %	Ikaalisten Matkatoimisto Oy	2 961	0,6 %
Others	32 987	4,9 %	Others	26 982	5,2 %
<b>Total</b>	<b>676 054</b>	<b>100,0 %</b>	<b>Total</b>	<b>518 052</b>	<b>100,0 %</b>