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Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism

Finland's Tourism Strategy 2019–2028 and
Action Plan 2019–2023



Ministry of Economic Affairs
and Employment of Finland

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Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism

Finland's Tourism Strategy 2019–2028 and Action Plan 2019–2023

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<p>Abstract</p> <p>Tourism is a service sector with great potential for Finland, and a growing export sector. In 2017, tourism exports accounted for more than 17% of the export income generated by services. The total demand for tourism was approximately EUR 15 billion, and its direct share of GDP was 2.6 %. Tourism employs more than 140,000 people. In addition, tourism has significant regional economic impacts.</p> <p>“Achieving more together – sustainable growth and renewal in Finnish tourism” is the name of Finland's national tourism strategy for 2019–2028. It envisions Finland as the most sustainably growing tourist destination in the Nordic countries. The key objective is to double tourism exports. The strategy identifies four key priorities that will enable sustainable growth and renewal of the tourism sector: supporting activities that foster sustainable development, responding to digital change, improving accessibility to cater to the tourism sector's needs, and ensuring an operating environment that supports competitiveness. Cooperation plays a major role, as the name of the strategy indicates.</p> <p>The tourism strategy is based on the roadmap for growth and renewal in Finnish tourism 2015–2025, which was updated in 2019. The horizontal expert group on tourism played a key role in the update. The Tourism Strategy supports Prime Minister Rinne's Government Programme. The purpose of the strategy is to provide a common guideline for development work in the tourism sector. Measures will be taken in collaboration by a wide range of actors.</p> <p>Contact person at the Ministry of Economic Affairs and Employment: Sanna Kyyrä, Chief Specialist, tel. +358 50 358 9497, Innovations and Enterprise Financing Department.</p>			
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<p>Matkailu on Suomelle suuren potentiaalin omaava palveluala ja kasvava vientiala. Vuonna 2017 palveluiden vientituloista matkailuvienti muodosti yli 17 prosenttia, matkailun kokonaiskysyntä oli noin 15 miljardia euroa ja sen suora osuus BKT:sta 2,6 prosenttia. Matkailu työllistää yli 140 000 henkilöä. Lisäksi matkailulla on merkittäviä aluetaloudellisia vaikutuksia.</p> <p>”Yhdessä enemmän – kestävää kasvua ja uudistumista Suomen matkailuun” on Suomen valtakunnallinen matkailustrategia vuosille 2019–2028. Visiona on olla Pohjoismaiden kestävimmin kasvava matkailukohde. Keskeisenä tavoitteena on tuplat matkailuvienti. Matkailualan kestävä kasvun ja uudistumisen mahdollistamiseksi strategiassa on tunnistettu neljä painopistettä: kestävä kehityksen mukaisen toiminnan tukeminen, digitaaliseen muutokseen vastaaminen, saavutettavuuden kehittäminen matkailualan tarpeet huomioiden sekä kilpailukykyä tukevan toimintaympäristön varmistaminen. Yhteistyön merkitys on vahva, mikä näkyy strategian nimessäkin.</p> <p>Matkailustrategian taustalla on Suomen matkailun kasvun ja uudistumisen tiekartta 2015–2025, joka päivitettiin vuoden 2019 aikana. Poikkihallinnollisella matkailun asiantuntijaryhmällä, MiniMatkalla, oli keskeinen rooli päivityksen edistämisessä. Matkailustrategia tukee pääministeri Rinteen hallituksen ohjelmaa.</p> <p>Strategian tehtävänä on toimia matkailualan toimijoiden yhteisenä ohjenuorana kehittämistyössä. Toimenpiteitä toteutetaan laajan toimijajoukon yhteistyönä.</p> <p>Työ- ja elinkeinoministeriön yhdyshenkilö: johtava asiantuntija Sanna Kyyrä, puh. 050 358 9497, Innovaatiot ja yritysrahoitus -osasto.</p>			
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<p>Turismen är för Finland en servicebransch med stor potential och en växande exportbransch. Av exportinkomsterna för tjänster för 2017 utgjorde turismexporten över 17 procent, den totala efterfrågan inom turismen var cirka 15 miljarder euro och dess direkta andel av BNP 2,6 procent. Turismen sysselsätter över 140 000 personer. Turismen har dessutom betydande regionalekonomiska effekter.</p> <p>”Tillsammans blir det mer – hållbar tillväxt och förnyelse inom turismen i Finland” är Finlands nationella turismstrategi för 2019–2028. Visionen är att vara det turismmål i Norden som växer på det mest hållbara sättet. Det centrala målet är att fördubbla turismexporten. För att möjliggöra hållbar tillväxt och förnyelse inom turismen har man identifierat fyra prioriteringar i strategin: att främja verksamhet i enlighet med principerna för hållbar utveckling, att svara mot den digitala omvälvningen, att förbättra tillgängligheten med hänsyn till turismens behov och att säkerställa en verksamhetsmiljö som stöder konkurrensförmågan. Samarbetets betydelse är stor, vilket också syns i strateginamnet.</p> <p>Bakom turismstrategin finns Vägkartan för tillväxt och förnyelse inom turismen i Finland 2015–2025, som uppdaterades 2019. Den förvaltningsövergripande sakkunniggruppen för turism, MiniMatka, hade en central roll i arbetet med uppdateringen. Turismstrategin stöder regeringsprogrammet för statsminister Rinne.</p> <p>Strategin har till uppgift att vara ett gemensamt rättesnöre i utvecklingsarbetet för aktörerna inom turismen. Åtgärderna genomförs som ett samarbete mellan en stor grupp av aktörer.</p> <p>Kontaktperson vid arbets- och näringsministeriet: Sanna Kyyrä, ledande sakkunnig, tfn 050 358 9497, avdelningen för innovationer och företagsfinansiering.</p>			
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1 Introduction

Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism sets out Finland’s national Tourism Strategy for 2019–2028. The strategy defines targets for the development of tourism until 2028 and contains an action plan for measures to be taken between 2019 and 2023. This means the strategy looks further into the future, while the development measures are set for the next few years to match the government term.

The Tourism Strategy is a tool that brings tourism actors together. The purpose of the strategy is to serve as a common guideline for development work in tourism and to generate effective tourism policies. The measures will be taken by a wide range of actors in collaboration. The Tourism Strategy will be implemented within the resources made available by central government spending limits and budgets. Some of the targets and measures may be covered by funding from sources such as EU programmes. The implementation of the strategy and progress towards the targets will be monitored, and targets and measures will be specified further where necessary.

The Tourism Strategy supports the Programme of Prime Minister Rinne’s Government. Since the Tourism Strategy is not a political view of the targets set for tourism and the measures required, there are also differences between the documents. One of the measures proposed in the Tourism Strategy is the preparation and launch of an inter-administrative strategic programme for tourism. The measure will support the implementation of the Tourism Strategy on a narrower scale only covering central government actors.

The Tourism Strategy has been updated under the coordination of the Ministry of Economic Affairs and Employment. The Ministry is responsible for the priorities of Finland’s tourism policy and coordinates development work together with other ministries and the sector’s actors. The Tourism Strategy will be implemented

between many actors in collaboration, which is why the range of measures is broad. The Tourism Strategy does not assign separate measures for urban and rural areas. Instead, tourism will be developed by taking the regions into account together.

Finland's tourism policy, and consequently also the Tourism Strategy, focuses on promoting Finnish business and employment through tourism. The Ministry of Economic Affairs and Employment is responsible for the development of inbound and domestic tourism. In addition, the Ministry promotes the smoothness of the operating environment of tourism enterprises that enable outbound tourism as part of the development of Finnish business activities. The figures given in the Tourism Strategy are strongly based on tourism account data provided by Statistics Finland and Visit Finland. The tourism accounts cover inbound tourism demand, domestic tourism demand and the domestic share of outbound tourism demand. This means the demand figures and their development estimates used in the Tourism Strategy take into consideration all of the above three dimensions of tourism. They are also taken into consideration in the measures, but promoting inbound tourism is prioritised in that context. The potential for growth in tourism exports is greater than the growth potential in domestic tourism demand. In addition, public support is needed in the development of service exports and the internationalisation of tourism enterprises.

Underpinning the Tourism Strategy is the Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025, which was prepared during 2014 in a very broad and inclusive process. Updating the roadmap became topical following around four years of implementation. The contents and measures of the roadmap have now been updated to better reflect the current situation. In the following, 'roadmap' refers to the document published in 2015 and 'strategy' to the roadmap updated in 2019. The Tourism Strategy sets out which measures should be taken in the years ahead to promote sustainable growth and renewal in tourism. The cross-cutting theme of the strategy is cooperation, which is vital to achieve sustainable growth and renewal in tourism.

The definition of 'tourism' and a description of the tourism cluster can be found in Appendix 1. The process employed to update the Tourism Strategy is described in Appendix 2, and the key quantitative indicators used in the strategy are explained in Appendix 3. Appendix 4 contains a report on the environmental impact assessment and Appendix 5 a report on the employment and gender impact assessment of the Tourism Strategy.

2 Four good reasons to invest in tourism

1. Tourism is a service sector with major growth potential and a lot of multiplier effects on other sectors

Tourism has a significant impact on the economy and employment in Finland. Tourism directly generates 2.6 % of the gross domestic product. Total tourism demand was around EUR 15 billion in 2017, with tourism enterprises' turnover exceeding EUR 19 billion. Tourism also generates a variety of multiplier effects on other industries such as construction, food, textiles and financial services. One tourism euro generates an estimated 56 cents of added value for other industries. The value added of tourism is also high. Tourism offers great potential for growth, with its global annual growth rate being 5 %.

Revenues from tourism can be increased by producing high-markup value-added services for domestic and inbound tourists. Growth is also expected to be generated through innovation taking place at the interface of tourism and other sectors (such as physical activity and wellness services, food industry, construction industry and ICT).

Domestic tourism plays a key role in Finland's total tourism¹. Domestic demand accounts for around 70 % of the total demand for tourism. Domestic tourism provides around-the-year business and a more even spread in the market when, for example, the international political situation changes and affects demand from the international market.

1 Ministry of Economic Affairs and Employment, 2019 Report on domestic tourism development needs (in Finnish only: Selvitys kotimaanmatkailun kehittämistarpeista)

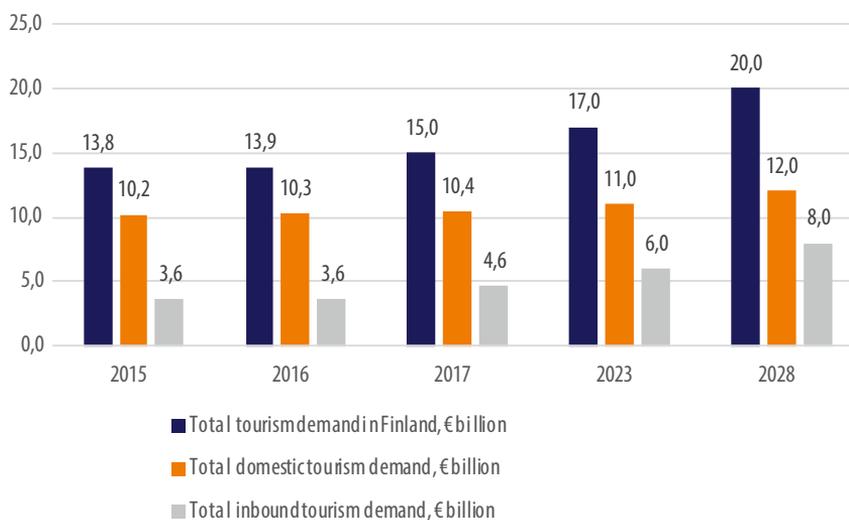


Figure 1. Tourism demand in Finland 2015–2017 and targets for 2023 and 2028.

Source: Visit Finland, Tourism Accounts 2019

Demand for accommodation services started to increase in Finland in 2016 and grew strongly in 2017, too. In 2018, growth in demand continued at a moderate rate, with the exception of July and September, during both of which demand dropped by around 1 %. In 2018, Finland’s accommodation establishments recorded a total of more than 22 million overnight stays, of which domestic tourists accounted for 15.4 million and inbound tourists around 6.8 million. Inbound and domestic demand for accommodation services both grew by 1.5 % from the previous year. The growth rate of total demand for accommodation services was the same, totalling 1.5 % in 2018.

The Accommodation Statistics cover accommodation establishments with at least 20 beds or caravan pitches with electrical connection points, as well as hostels. A large proportion of properties with fewer than 20 beds are rental cabins and rental holiday dwellings. In some areas and tourism centres the number of cottages (chalets, bungalows) rented to tourists as well as overnight stays in short-term private-rental accommodation is high, so the Accommodation Statistics do not provide an overall picture of the volume of tourism flows in the area. Compilation of statistics on private-rental cottages has been developed as part of the Accommodation Statistics, with the first experimental statistics published in spring 2019 concerning 2018. To supplement the overall picture, future development work

will include developing statistical methods to monitor short-term accommodation supply and demand within the platform economy.

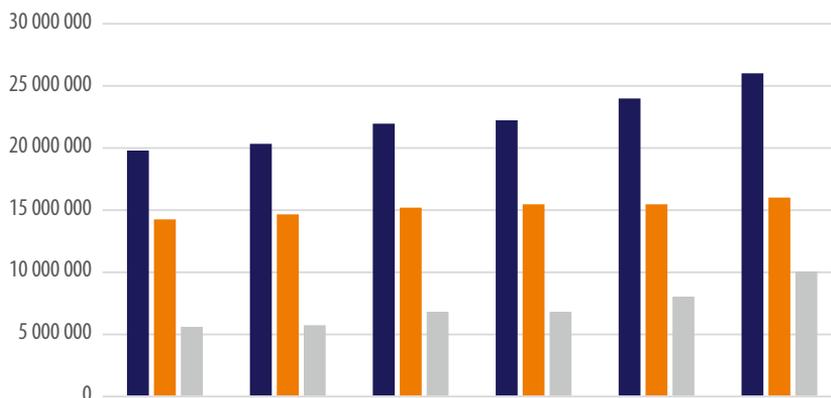


Figure 2. Trend in registered overnight stays during 2015–2018 and targets set for 2023 and 2028. Source: Statistics Finland, Accommodation Statistics

The majority of all tourism in Finland is related to leisure activity². The difference between leisure and business trips is regional by nature. Business trips focus mainly on the most important economic centres and on cities with a university or university of applied sciences. Leisure trips spread geographically more evenly across towns and cities and rural and archipelago areas. The annual pattern of tourism shows a more even spread across the seasons and, correspondingly, there is more than one season.

² Statistics Finland, Finnish Travel & Visit Finland Visitor Survey, 2018. For example, in 2018 Finnish residents made 25.7 million domestic leisure trips with an overnight stay, while the number of business trips was 3.4 million. Of inbound tourists, only 13% visited Finland on business.

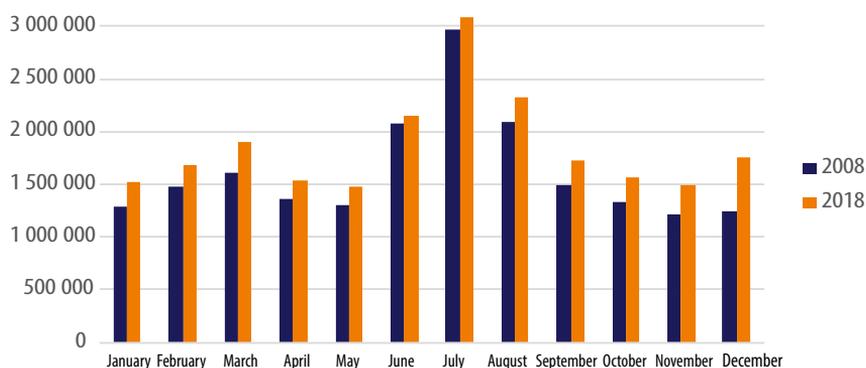


Figure 3. Monthly variation in overnight stays in 2008 and 2018.

Source: Statistics Finland, Accommodation Statistics

2. Tourism is a growing export sector

Tourism export growth is clearly outpacing other service exports. In 2017, tourism exports accounted for 17.2 % of Finland's service export revenue. Tourism is the only export sector whose consumption takes place in Finland and that pays value-added tax on its activities. From the perspectives of the national economy and regions, developing inbound tourism is the most efficient way of increasing Finland's tourism revenues. It also pays to invest in attracting international conferences and business events to Finland, as participants to these spend considerably more money than traditional leisure tourists, their durations of stay are long and the business is not that sensitive to economic cycles. In particular, Finland's geographical location next door to Russia and with excellent flight connections to Asia opens many opportunities for the tourism sector. Considering the geographical advantages, development measures must be targeted over the long term at utilising the enormous potential.

3. Tourism is a significant source of employment

Tourism employed more than 140,000 people in 2017. In addition, temporary agency work is commonly used, estimated to amount to 6,000 full-time equivalents (FTE) in the hotel and restaurant sector. Tourism also provides employment to a lot of young people, who account for 30% of the sector's employees. The number of enterprises in the tourism industries totals around 28,500, of which most are microenterprises. In 2017, the number of tourism enterprises increased by around

400, their turnover by more than EUR 6 million and their employment effect by more than 1,000 FTEs. The largest number of new enterprises has been created in programme services for tourism, utilising enterprises operating at the interfaces as their partners and nature as their operating environment. Tourism will remain labour-intensive also when the use of technology and, consequently, service accessibility increase.

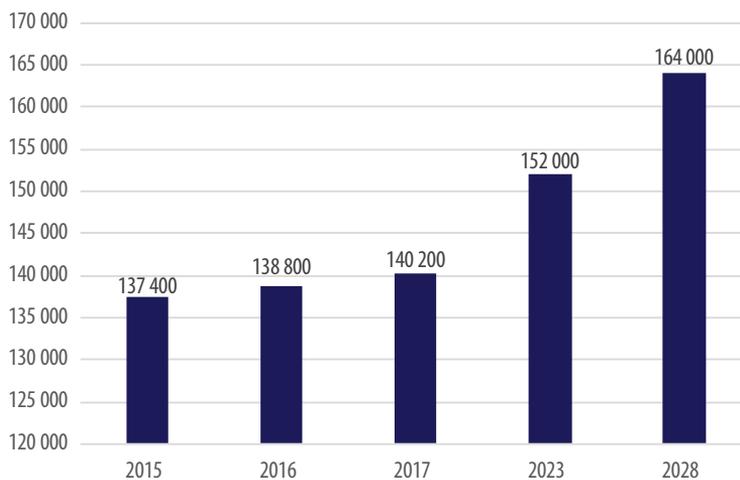


Figure 4. Employment in tourism industries 2015–2017 (total part-time and full-time, number of persons) and targets for 2023 and 2028. Source: Visit Finland, Tourism Accounts 2019

4. Tourism is a regionally significant sector in Finland

Tourism is a factor promoting a balanced regional structure. The importance of tourism is increased by the sector's location-specific nature; most tourism jobs and locally performed development work cannot be relocated to other countries or localities. The role of tourism is emphasised locally, especially in connection with tourism centres located in rural and archipelago areas. Central government provides budget funds for purposes including cultural destinations (such as museums and cultural heritage sites) and hiking services of national parks and hiking areas (routes, amenities and their servicing and maintenance), which can be utilised in nature tourism products. The business sector creates chargeable services in local areas. On average, spending by visitors to a national park provides the

local area with around EUR 10 for each euro invested in the park's hiking services and nature centres. For national parks located in tourism areas, the benefit is even higher at an average of EUR 14.

Tourism helps to create more diverse and higher-quality services for host residents but also a basic infrastructure based on which other business activities can be developed. Tourism that supports the preservation and development of cultural heritage and cultural environment strengthens local customs and the cultural identity of regions.

Tourism has a positive impact on regional development. To ensure development, the objective must, in addition to generating positive impacts from tourism on the regional economy, be to distribute the growth in overnight stays more evenly not just across the months of the year but also between regions. As regards inbound tourism, the Visit Finland greater regions cooperation model promotes this objective. Finland has been divided into four greater regions to develop Finland's country brand for tourism. The greater regions are the Helsinki Metropolitan Area, Lapland, Finnish Lakeland, and Coast and Archipelago. This division into greater regions provides a foundation for a strong supply of tourism services and products and for creating attractive sub-brands. The objectives, resources and scope of cooperation are agreed with each greater region.

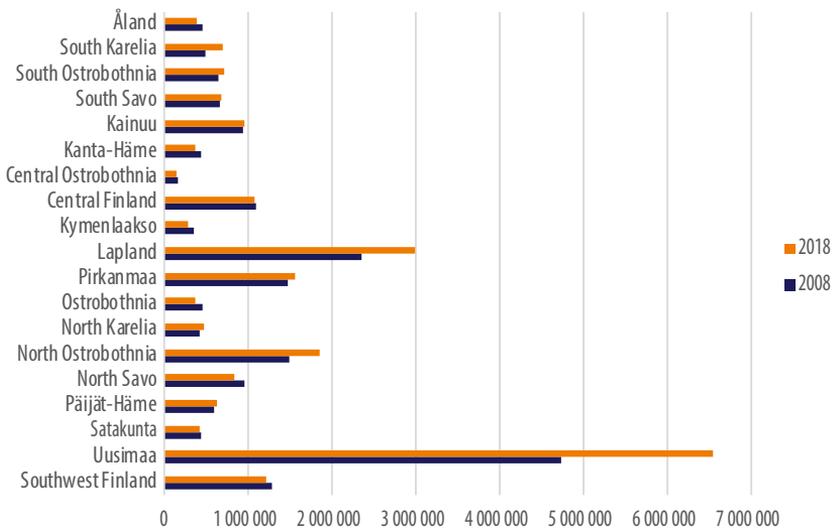


Figure 5. Overnight stays by region in 2008 and 2018. Source: Statistics Finland, Accommodation Statistics

Viewed regionally, overnight stays especially in South Karelia, Uusimaa, Lapland and North Ostrobothnia stand out in the Accommodation Statistics, with all of them having reported significant growth over the ten-year period. It is also noteworthy that, in the majority of the regions, overnight days have either remained unchanged or decreased. The figures do not include statistics on accommodation such as private-rental cottages, which so far cannot be broken down by region.

3 Future outlook for tourism

The world is changing more and more rapidly, and at the same time global interdependence is increasing. Global phenomena, events and megatrends are extending their impact to Finland, too. Tourism is an integral and interactive part of society. Political, economic, societal, technological and environmental factors all play a key role in how tourism is developed and evolves. Climate change has significant impacts on the natural environment of the Arctic region in particular, and climate considerations may also affect the travel choices of individuals. New experiences, luxury, looking after personal wellbeing, cultures and authenticity, and the ever-present digital connectivity are some of the trends that shape tourist behaviour. The rapid rise of the sharing and platform economy has created new service providers for the tourism sector, too, while at the same time giving rise to challenges concerning the realisation of fair competition. The tourism market is global and tourists are able to choose their preferred product anywhere in the world. Visibility on global digital platforms is increasingly important. The future outlook of tourism is strongly influenced by changing global target groups, investments in the sustainability of tourism, development of enabling technologies and digitalisation, and changes taking place in mobility.³

Globally changing tourist target groups

Tourist volumes will increase in the future, and new groups of tourists will affect the demand for tourism services. Alongside group travel, the volumes of free

³ Adapted from OECD, 2018, Ministry of Economic Affairs and Employment, 2018, Annual sectoral report on tourism (in Finnish only: Matkailun toimialaraportti), 2019

independent travellers (FIT) and small groups are increasing, which needs to be taken into account in product development and marketing focus. On the global level, the ageing population is prosperous and the middle class is becoming the largest social class. Urbanisation is increasing and people are becoming alienated from nature. Generation Z (born between the mid-1990s and early to mid-2010s) and Generation Y (born between the early 1980s and mid-1990s) differ from the older generations in terms of how they, for example, plan their trips and use social media. Also growing are three-generation holidays as well as joint trips of grandparents and grandchildren. Sexual minorities are also a rapidly growing tourist target group in the world.

With the target groups changing, tourism service providers are required to take accessibility increasingly into account. Almost a third of the European population is included in the accessible tourism target group, and there are around 800,000 persons with reduced mobility in Finland. Ensuring accessibility is not limited to improving physical accessibility in tourism services. Instead, attention should also be paid to matters such as smooth service provision for tourists with sensory impairments or impairments in social interaction. Almost everyone will need accessible services at some point in their life.

Sustainability of tourism as a basic requirement

Improving the sustainability of tourism is a key issue for the future and the societal acceptability of the sector. Tourism actors must invest in the development of sustainable and responsible tourism, which includes not only environmental considerations but also social, cultural and economic aspects on a broad scale. The requirement to develop sustainable tourism has an emphasis on a low-carbon and resource-efficient global economy, for example in terms of food production, water consumption and waste minimisation, and generates pressure to reduce emissions from tourism and mobility and to take into account the social and cultural wellbeing of host residents.

Concerns about global warming have a particular impact on emission reduction efforts. The World Tourism Organization (UNWTO) has estimated that emissions from tourism as a whole account for around 5% of global carbon dioxide emissions.

Emissions mainly originate from transport (75%) and accommodation (20%).⁴ Restrictions on greenhouse gas emissions, emissions trading and potential increases in jet fuel and other fuel prices will increase the cost of travel and are therefore likely to reduce demand for more distant destinations and particularly those that require air travel. Use of alternative transport options may increase due to motivations including climate considerations. Alongside reducing emissions from individual forms of mobility, it is essential to seek to make tourism a low-carbon sector as a whole. Reducing the carbon footprint of tourism will require political decisions and international agreements to reinforce the sector's own decisions and to support changes in the consumption behaviour of tourists.

Enabling technologies and digitalisation

New and enabling technologies (such as digital platforms, the Internet of things (IoT), autonomous vehicles, artificial intelligence, blockchains) can make travel more efficient and accessible in the future, including financially. For example, artificial intelligence and virtual reality create many new opportunities for understanding and analysing tourism services and tourists. New challengers will emerge to compete with the more traditional ways of reaching the tourist such as recommendations on electronic platforms or films and other audiovisual productions. On the other hand, the rapid development of technology, such as virtual reality, may also produce alternatives to physical travel. Technological advancements and digitalisation in the sector require tourism actors to be willing to keep up with the developments and have the desire to learn new things and the preparedness to renew their business. Tourists in turn are required to be prepared to change their travel habits, while public actors will need to have means to support the development of tourism.

The development of digital platforms has boosted the strong development of the sharing economy. The sharing economy refers to the sharing of underutilised assets (such as housing or means of transport) but also of work and services via electronic platforms. In tourism, the sharing economy is practised in accommodation,

4 UNWTO, 2017

transport, catering and ancillary services. The sharing economy is often justified as an opportunity to find ecological alternatives and to experience local everyday lives, possibly also as a way of achieving savings in travel costs. In many cases, the sharing economy has changed as a phenomenon from the previous definition of the sharing and better utilisation of underutilised resources towards professional business activities taking place on platforms. The traditional definition no longer reflects the current state of play. The operating models of the platform economy challenge the regulatory environment, for example with regard to market access requirements, taxation, employment and consumer protection.

Digital innovations are expected to bring solutions to travel chains and response to customer needs in the future, as the functionality of transport connections and the smoothness of travel chains are crucial to the future of tourism. In addition to digital innovations, the aim is to streamline mobility and improve the safety of the operating environment in terms of transport innovations and customs, visa and terminal functions.

PESTEL-analysis of tourism as a sector

A PESTEL analysis examines the macro-level phenomena that form the boundary conditions for a business. On the other hand, identifying and anticipating phenomena may also provide a significant competitive advantage for the enterprise.

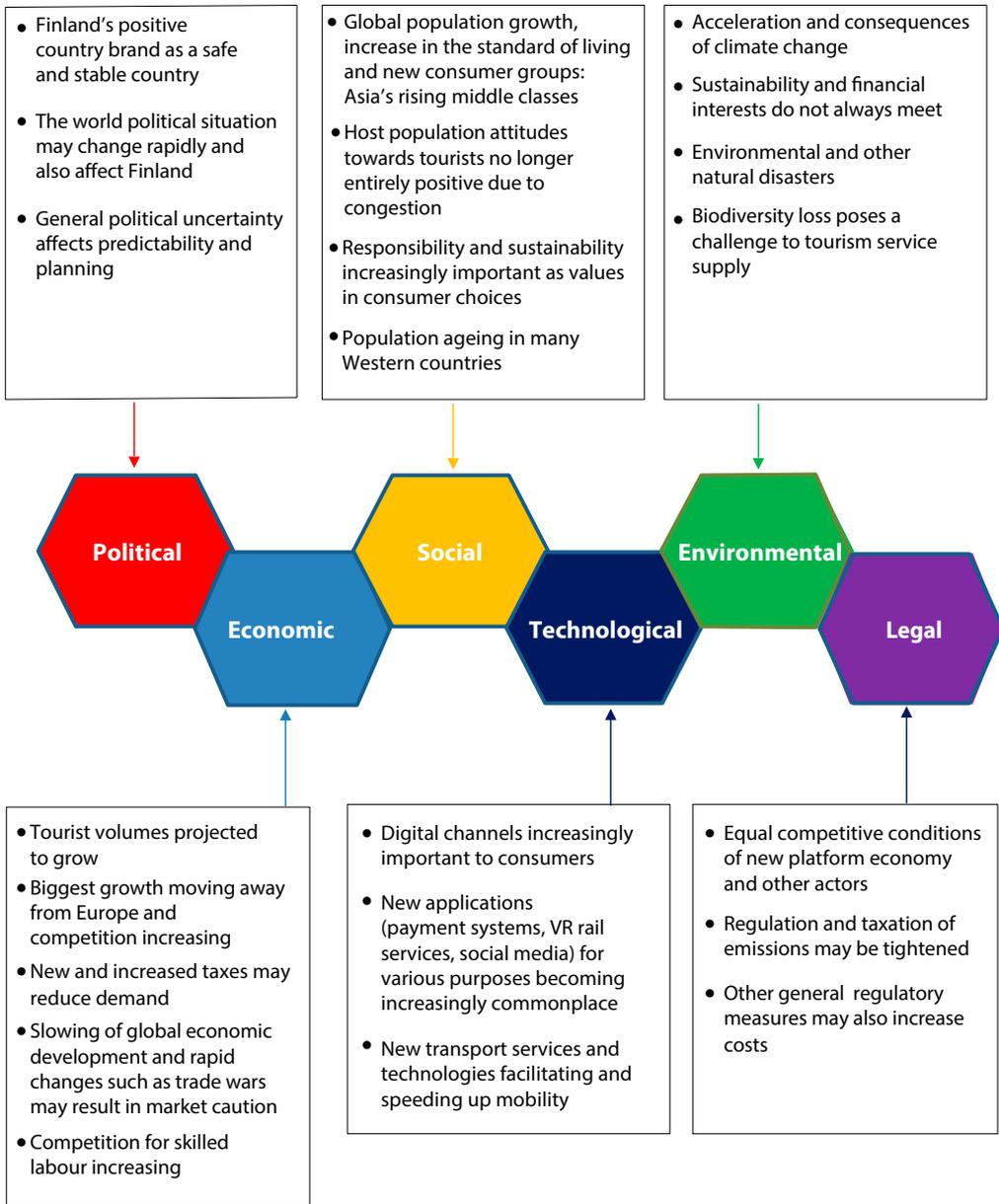


Figure 6. PESTEL approach to the operating environment of tourism.

Source: Adapted from the annual sectoral report on tourism, 2019

4 Targets for 2019–2028

VISION:

Original and intriguing Finland is the most sustainably growing tourism destination in the Nordic countries.

MISSION:

Tourism is a responsible and growing service business sector that generates wellbeing and employment around the year in Finland.

Finland's tourism sector will grow significantly until 2028

Table1. Quantitative outturn during 2015–2018 and targets for 2023 and 2028

	2015	2016	2017	2018	2023	2028
Tourism demand (€ billion)	13,8	14	15*	***	17	20
Tourism exports (€ billion)	3,6	3,6	4,6*	***	6	8
Domestic tourism demand (€ billion)	10,2	10,4	10,4*	***	11	12
Tourism direct value added as a share of GDP (%)	2,5	2,5	2,6*	***	3	3
Turnover of tourism cluster enterprises (€ billion)	18,7	18,1	19,6	***	25	29
Tourism employment (part-time and full-time employees, number of persons) **	137 400	138 800	140 200*	***	152 000	164 000
Registered overnight stays (million)	19,7	20,3	21,9	22,2	24	26
Inbound registered overnight stays (million)	5,5	5,8	6,7	6,8	8	10
Domestic registered overnight stays (million)	14,2	14,6	15,2	15,4	15,5	16
Finland's market share (%) of inbound overnight stays in relation to other Nordic countries	13,3	12,9	14,2	13,9	15	16
Accommodation sales (€ million)	1 009	1 081	1 198	1 246	1 430	1 643
Total local economy income effects of visitors' spending in national parks, national hiking areas and other most popular sites (€ million)	215	232	258	290	336	350
Number of visits to protected areas, hiking areas and nature centres of Metsähallitus (million)	7,2	7,7	7,9	8	8,6	9
Finland's ranking in seasonality of inbound overnight stays compared with other Nordic countries	1	***	***	1	1	1

* Preliminary data or estimate

** Excludes temporary agency work

*** Figure not available

Source: Statistics Finland, Visit Finland, WTTC, Oxford Economics, UNWTO, Metsähallitus

Sustainable tourism means tourism that takes full account of its current and future economic, social, cultural and environmental impacts, addressing the needs of tourists, tourism enterprises, the environment and host communities.⁵ Taking sustainability into account increases the profitability and qualitative growth of the sector and the positive impact of the sector on society, and steers towards minimising the negative impacts of tourism. In addition to environmental aspects, sustainable tourism means socio-cultural responsibility (including activities that do not damage the destination's societal structures, promoting the development of the host society based on its own values and needs, conserving and strengthening culture and cultural heritage, assuming responsibility for the enterprise's own personnel, and having ethical values and implementing them in practice) and economic responsibility (including sourcing services locally, employing host populations, developing infrastructure, cash flows remaining in the destination, and operating lawfully and responsibly, including taxes and other obligations imposed by public authorities, wages and salaries). On the other hand, it must be ensured that the tourism sector is not encumbered with an excessive administrative burden so that tourism enterprises, most of which are small or medium-sized enterprises, will be able to remain competitive and viable. From the global perspective, a lot has already been done in Finland for sustainability and aspects such as climate considerations.

Finland aims to be the most sustainably growing tourism destination in the Nordic countries. Sustainability and growth are not mutually exclusive. Culturally, socially, environmentally and economically sustainable choices can help achieve growth in enterprise profitability, for example. Sustainable tourism is the objective, while responsibility is the mode of operation for achieving sustainability. The starting points of the Nordic countries as regards the functioning of society and attention to sustainability, coupled with their shared will to develop these further, provide a solid foundation for promoting the sustainability of tourism.

Sustainable growth and renewal will become a reality if the tourism sector and tourists responsibly and in a sustained manner change their ways of doing things. The measures of this Tourism Strategy support such change. The implementation of the measures will require commitment and courage, adequate resources,

5 based on UNWTO, 2005.

cooperation between actors and relatively balanced global development, both politically and economically. The growth of sustainable tourism will promote Finland's sustainable growth.

Finland will succeed by focusing on its own thematic strengths that promote year-round tourism. In the international target markets in particular, the thematic approach to product development and marketing has proven to be effective. Finland will offer original and intriguing tourism services to inbound and domestic tourists.

Sustainable growth and renewal of tourism play an important role in the service business and, consequently, in ensuring Finland's future competitiveness. For the vision to become a reality, the development objectives set for Finland's tourism are promoting sustainable tourism, digitalising the tourism sector, ensuring accessibility and improving the smoothness of the operating environment.

The development of tourism demand and employment in tourism are key quantitative indicators for the development of the Finnish tourism sector. These indicators are used to monitor the impact of tourism on Finnish society. Other quantitative indicators support the materialisation of demand and employment.

Positive development of demand and employment requires sustainable, high-quality and safe tourism services that are available around the year and easy to buy. Monitoring the development of tourism demand and employment is justified at both national and regional levels, as tourism has lots of multiplier effects on other sectors, too. Sustainable growth in tourism is enabled by stronger cooperation between industries. Increased turnover and employment in tourism enterprises results in increased turnover and job creation through indirect and derived, that is, multiplier effects, in sectors such as IT services, daily consumer goods trade, construction, cleaning and public cleansing, real estate maintenance and the security industry.

The targets are based on existing monitoring data and projections on the development of tourism by various research institutions. The international target market is expected to grow at an annual rate of around 4 % in overnight stays and around 5 % in tourism exports. The 5 % annual growth rate in inbound demand means doubling the demand growth rate. It is possible to reach this target, as evidenced by the growth achieved during 2017–2018. Achieving the ambitious target requires ambitious plans and responsible resourcing. Success in the international market calls for strong central

government support, networks, sparring and opening doors. The potential for growth in tourism exports is greater than the growth in domestic tourism demand. This is why it is justified to prioritise support to the internationalisation of tourism enterprises.

The annual growth in demand for domestic tourism is projected to be around 1 %, with overnight stays expected to grow by an annual rate of around 2 %. The general objective of the development of domestic tourism is to reduce the gap between the domestic and inbound travel accounts. The growth targets for domestic tourism are moderate, although the growing popularity of staycations and land transport due to climate concerns may increase the popularity of domestic tourism. In Finland the phenomenon can already be seen as growth in domestic rail travel. Domestic tourism can be promoted through product development and marketing.

The Tourism Strategy was updated in a situation where discussion on assessing the sustainability of tourism is at centre stage. Indicators for the assessment of sustainability have been developed regionally and nationally in Finland as well as internationally. Baseline data on the current situation at the national level is available for the indicators presented in the strategy. Historical data for the indicators and certainty of data production in the future, too, enable the development of indicators and continuity of monitoring. Indicators – quantitative and qualitative alike – will be supplemented particularly as regards sustainable tourism, digitalisation of tourism, and visitor numbers and economic impacts of professionally managed museums and World Heritage Sites as progress takes place in the measures specified in the strategy concerning knowledge-based management.

Finland's target markets

Aiming products and communications at the right target groups is essential as competition for the attention of tourists is intensifying. Finland must provide tourists with reasons to visit Finland, to entice first-time visitors to revisit and to increase the lengths of tourist stays. Finland's pull factors are based on nature and increasingly also on experiencing Finnish lifestyle and culture. According to a report by Visit Finland, there are six target groups with greatest potential in Finland's international focus markets (Germany, the UK, China, Japan): Activity Enthusiasts, Nature Wonder Hunters, Nature Explorers, City Breakers, Authentic Lifestyle Seekers,

and Comfort Seekers. All of these segments share the desire for exploring and experiencing nature.⁶

During the updating of the Tourism Strategy in 2019, measures to promote inbound tourism were targeted at new markets with potential for growth (India and the UAE), markets already generating growth (China, Japan) and established markets maintaining steady demand (Germany, the UK, Russia, the Netherlands, Belgium, Switzerland, France, Italy, Spain, the USA, South Korea). The target markets were determined in cooperation between Visit Finland and the greater regions.

The choice of target markets for inbound tourism and the efficient use of resources allocated to the target markets will contribute to achieving the objective of sustainable growth. In the future, sustainable growth in inbound tourism demand will be ensured by investing in a balanced market portfolio which, as a whole, will contribute to the realisation of the vision of Finland's Tourism Strategy. A balanced market portfolio includes international market choices and joint marketing opportunities in the neighbouring markets (Nordic countries, Baltic Sea region). The targeting of the investment will be based more strongly on expected effectiveness. Effectiveness, or the ratio of marketing inputs to tourism demand from the target markets, and the appropriateness of the target markets to the promotion of Finland's Tourism Strategy vision will be assessed regularly in cooperation between Visit Finland and the greater regions. The appropriateness of the target markets refers, for example, to the target market's interest in sustainable tourism or in spending money in Finland. Alongside the longer-term choice of target markets, preparedness will be maintained to react to current themes, phenomena and social media headlines and in that way maintain and revamp Finland's global image associated with being original and intriguing.

The growing appreciation of domestic tourism and the increase in climate and environmental awareness among tourists are projected to increase the attractiveness of domestic tourism in Finland. Domestic tourists will also account for most of Finland's tourism demand in the future, although it is estimated that demand will develop moderately in line with statistical development. One reason

6 Visit Finland Target Group Study, 2017

for this is the small size of the domestic tourism market in terms of number of people compared with inbound market potential.

The share of demand remaining in Finland from outbound tourism is recorded as part of domestic tourism demand. Consequently, Finnish residents' trips abroad and their interest in, for example, holidays in the sun during the winter holiday period contribute to demand development in domestic tourism, too. In 2017, the share of demand remaining in Finland from outbound tourism was EUR 2.1 billion (20 %) of domestic tourism demand. The target groups for domestic tourism have not been defined, but the matter is specified as a measure to be assessed in the strategy (Measure 5). The Tourism Strategy does not address the target groups of outbound tourism. Each country is responsible for marketing itself in other countries and therefore also for identifying the target group potential.

Finland's choices to make the vision a reality and to reach the quantitative indicators

- Tourism will be developed through economically, ecologically, socially and culturally responsible choices that ensure sustainable growth and steer towards minimising negative impacts.
- The efficiency of monitoring of effectiveness, evaluation and communication in the tourism sector will be increased.
- Business Finland's resourcing will be increased to make it competitive at the Nordic level in order to develop Finland's inbound tourism.
- Inbound tourism will be developed at the national level by using Visit Finland's greater regions cooperation model. Tourism marketing and product development will take place in four greater regions: the Helsinki Metropolitan Area, Finnish Lakeland, Coast and Archipelago, and Lapland.
- Alongside achieving growth in inbound tourism demand, the focus in tourism development will be on promoting the competitiveness of domestic tourism.
- Finland will be made a smart destination offering the smoothest purchase path from dreaming to travelling.

- Finland will succeed by focusing on its own thematic strengths that promote year-round tourism.
- The accessibility of Finnish tourist destinations will be promoted by developing rail, road, sea and air transport as well as travel chains, taking into account the needs of local as well as tourism transport.
- The renewal of and sufficient development funding for national parks, hiking areas and World Heritage Sites as well as other sites of Metsähallitus, the agency governing the use of state-owned land, that are significant for tourism (such as historical sites), museum destinations and nationally valuable cultural environments will be ensured.
- The availability of skilled labour in the tourism sector will be promoted.

5 Funding of measures and roles of actors

Funding of measures

The implementation of the measures requires both public (national and EU) and private funding. The significance of public funding will be emphasised in the renewal and internationalisation of the tourism sector. In addition, the private-funding obligation for the granting of public funding will be underlined. As a rule, tourism enterprises will self-fund their own business development and marketing measures. Public funding will only provide partial support for the development of activities. Additional contributions to tourism funding will be needed, for example, in the promotion of the sector's sustainability and digitalisation.

Some of the measures will require a change in ways of doing things, enterprise willingness to take risks and a new attitude towards the development of tourism. Existing human and financial resources must be allocated more strongly than before. More open cooperation is needed in the tourism sector. Development projects of tourism enterprises and actors in the sector must be supported more strongly as projects implementing the policies set out in tourism strategies. In project implementation, efficiency and synergies between regions and actors must be sought considerably more efficiently than before. It is recommended that project consortia be established already when projects are being planned in order to enable best practices created in projects to be transferred to as many regions as possible already while projects are still underway. The establishment of a national sparring group to support the coordination of tourism projects should be explored and, if necessary, promoted.

Roles of actors

In the lists of measures, a party responsible for implementation or for coordinating implementation has been specified for each measure. This party, in cooperation with other actors, will promote the implementation of the measure.

For some measures, the parties involved in implementation vary, for example, in accordance with differences in organisation within the region or specifically to the measure. For example, regional cooperation parties for greater regions cooperation (Measure 27), which are under the coordination responsibility of Visit Finland, vary depending on the region. Similarly, those participating in international cooperation (Measure 28) vary due to the form of cooperation and the mandate of the working groups.

It is recommended that updates to regional tourism strategies take into account, alongside specific regional characteristics, the themes and updating cycle of the national Tourism Strategy.

In addition to the actors described below, other actors may participate in the implementation of the Tourism Strategy. The role descriptions of the actors highlight the most important tasks from the perspective of the development of the tourism sector.

The public sector's (central government, Metsähallitus, Centres for Economic Development, Transport and the Environment, regional councils, municipalities) primary roles include:

- creating a predictable and competitive operating environment that supports sustainable growth in tourism;
 - promoting legislation that develops the operating environment;
 - ensuring equal conditions of competition for actors;
 - developing public authority control with a "from control to coaching" approach;
- providing appropriate enterprise and other actor development services and funding instruments;

- investing in the infrastructure of tourism areas, national parks and other nature sites and also cultural sites, including transport and telecommunications connections, water and sewerage systems, roads, waste management, promotion of energy efficiency, routes and other service amenities;
- promoting the strengthening of Finland's commercial country image;
- supporting research, development and innovation activity;
- promoting long-term and systematic development cooperation at different levels to ensure growth.

Business Finland's duty by law⁷ is to help businesses to renew and develop by means of technology and innovations, promote international networking, increase exports and foreign investments to Finland, and inbound tourism to Finland.

Business Finland's duties include:

- promoting the development of innovations, new technology and business;
- promoting the targeting of foreign investment at Finland;
- promoting research, development and innovation activity and extensive utilisation of its results in business;
- being responsible for the funding of the production incentive for the audiovisual industry.

The duties of Visit Finland as part of Business Finland are, in particular:

- conducting Finland's commercial country image marketing in the selected target markets;
 - conducting image and product marketing directly at consumers, opening and maintaining B2B relationships, other B2B measures, PR and media work;
- offering tourist destinations and enterprises opportunities for product marketing and sales promotion by, for example, creating networks between tourism enterprises and international sales channels;

⁷ Act on Innovation Funding Centre Business Finland and the Limited Liability Company Called Business Finland (1146/2017)

- steering, coordinating and sparring the development of product supply to meet demand;
- conducting studies and market surveys and analysing research data for use by tourism actors;
- operating in good and active cooperation with enterprises, regional organisations and other actors involved in the greater regions cooperation;
- providing steering and advice for marketing and development projects in cooperation with regional and development organisations;
- ensuring the operational resources of Visit Finland's representatives abroad.

Regional tourism organisations play a strong role as developers of tourism in their respective regions. Finland has around 70 regional tourism organisations whose operating methods and geographical coverage (such as city, municipality, region) vary. With the operating environment changing, the regional organisations' tasks have also been transformed beyond marketing measures in recent years. Regional organisations provide sparring for digitalisation, observe the quality of services and implement regional development strategies. New operating models need to be explored in response to their changing role. The more specific role of regional organisations will be defined in the strategies for the greater region and tourism centre levels.

The roles of regional organisations include:

- serving as a cooperation forum for tourism actors in their operating area, as an information provider and tourism adviser;
- coordinating and compiling, in cooperation with entrepreneurs, the region's tourism offering into more sellable product entities;
- organising joint marketing of tourism in the region and ensuring an unbroken tourism service chain;
- acting as a link between Visit Finland and entrepreneurs.

Regional development companies have roles including:

- being responsible for developing services (such as business advice) supporting the business and development of enterprises operating in the region;
- promoting investment being attracted to the region;

- contributing to the management of tourism projects and ensuring that the development objectives of the projects managed match the needs of the region's tourism industry and the regional tourism organisation.

The roles of **research, education and training organisations** include:

- being responsible for tourism education and training and, for their part, for competence development through studies towards a qualification or degree and through continuing education in response to changing and evolving competence needs;
- participating actively in the implementation of their region's continuing education and retraining for tourism;
- being responsible for producing high-quality research data to promote sustainable growth and renewal of tourism and promoting the dissemination of research data for deployment of information and development of tourism;
- contributing as experts and administrators to the region's research and development projects and ensuring that the development objectives of the projects administered match the needs of the region's tourism industry and the regional tourism organisation;
- taking into account national strategic tourism needs.

Tourism enterprises have roles including:

- being responsible for the development of their business (such as product development, service design) and competences and contributing towards the costs of development measures targeted at their business;
- being responsible for selling and marketing their services;
- participating in the activities of their region's tourism network.

6 Monitoring of outcomes and communications

Monitoring of the outcomes of Finland's Tourism Strategy will take place as a whole and measure-specifically at two-year intervals. Monitoring will be based on reporting by responsible parties on progress made in measures. Quantitative targets will be monitored on an annual basis. The outcomes will be monitored by an inter-ministerial working group on tourism (MiniMatka) consisting of central government representatives and coordinated by the Ministry of Economic Affairs and Employment. The Tourism Strategy will be updated and monitoring of outcomes developed where necessary.

The Tourism Strategy and its summary will be available online on the website of the Ministry of Economic Affairs and Employment. The contents and implementation of the Tourism Strategy will be presented in working groups and at other events related to tourism.

Information about the implementation of and updates to the strategy will be provided at the Ministry's annual tourism policy seminars. Inter-ministerial working group experts will communicate about progress made in the components of the Tourism Strategy.

7 Measures to generate sustainable growth and renewal during 2019–2023

7.1 Turning sustainability into a competitive asset for Finnish tourism

The development and growth of Finnish tourism will be based on Finland's special natural conditions as well as cultural experiences and business activities created around them. Sustainable consideration of nature, cultural heritage, art and culture, and host lifestyles in tourism services requires strong impact management and attendance to resources in cultural, social, environmental and economic terms. The transition towards a responsible tourism industry is a long and challenging process. Consumer choices have a decisive effect on the types of tourism services that enterprises offer. Tourism areas and enterprises must actively steer tourists towards responsible choices. The entire tourism sector, tourism areas, tourism enterprises and tourists must be encouraged to make responsible choices through education, training, communications and marketing. Research, education and training organisations will play a key role in the development of sustainability, responsibility, safety and security. The sector's development and innovation activities will be based on research findings.

A key measure in increasing the sustainability of the Finnish tourism industry is the introduction of the Sustainable Travel Finland label created by Visit Finland and the deployment of related activities in tourism enterprises and areas. The label encourages tourism enterprises and areas to take environmental, cultural, social and economic sustainability into account in their own activities, product development and marketing. Sustainable choices should be profitable for enterprises from the

business perspective. An enterprise's responsible practices also attract employees: a company that shares the same sustainable values as its employees is an attractive employer in a sector experiencing a shortage of employees.

Responsible choices in the tourism industry will be supported by continuous quality development with the customer at the core as well as the development of the safety, security and accessibility of tourism services. Safety and security must be taken into account in services provided to customers throughout the chain, paying attention to the determination of the safety boundaries for any circumstances involved in the activities as required under the Consumer Safety Act and directing the activities on the basis of them. The stability, safety and security of Finnish society are important competitive factors for the tourism industry; in Finland water is safe to drink, transport works well, health care is of high quality and services of importance to tourists are available. Changing climate conditions, increased prevalence of the platform economy, globalisation and increased inbound independent tourism all affect safety and security.

Tourism enterprises will be able to reach new target groups and respond to customers' wishes and needs by developing services that are of high quality and accessible. Those in need of accessible tourism services require information on the accessibility of the destination so that they can assess whether the destination is suitable for them. For this, websites, too, must be accessible by everyone and serve all customer groups (Design for All) regardless of the individual's functional capacity. If they so wish, tourists should be able to travel to the destination as independently as possible. This helps create a basis for equitable tourism. Accessibility communicates about service quality and about the enterprise's values and ways of doing things. It also serves as a pull factor for the tourism enterprise.

The strengths of Finnish tourism will be made visible to customers by compiling productised, easy-to-buy and attractive tourism services under selected themes. More detailed action plans will be created to implement each theme. By developing products related to the selected themes, we will diversify our supply and provide tourists with reasons to visit Finland throughout the year. The themes offer strong growth potential for tourism around the year and across the country, including outside urban destinations. Increasing the year-round spread of tourism will improve the profitability of the industry. This will make the sector better able to attract investments and reduce the mismatch of demand and supply in terms of

labour. Improved round-the-year spread of tourism will have positive effects on other industries, regions and host populations by, for example, providing host residents with employment and promoting sustainable development in the region.

7.1.1 Turning sustainability into a competitive asset for Finnish tourism

1. Introduce the Sustainable Travel Finland label nationally.

Responsibility: Visit Finland, regional organisations, enterprises

2. Implement sustainable training entities for tourism enterprises

and areas. On topics including increasing customers' environmental awareness; climate change and carbon footprint reduction; energy and water efficiency; waste management; minimising wastage and promoting recycling; safety and security management and regulations relating to safety and security in tourism services; responsible productisation of Finnish cultural heritage; and socially, culturally and economically sustainable tourism.

Responsibility: research, education and training organisations, regional development companies, Finnish Safety and Chemicals Agency (Tukes), regional organisations, interest organisations

3. Communicate to customers about sustainable choices as part of marketing communications and make the Sustainable Travel Finland label known in Finland and in selected international markets and distribution channels. Guide tourists towards using sustainable services and acting in a manner that takes account of the environment, host communities and host culture.

Responsibility: Visit Finland, regional organisations, enterprises

4. Invest in domestic tourism marketing to increase domestic tourism.

Responsibility: Ministry of Economic Affairs and Employment, regional organisations, enterprises, Association of Tourism Organisations in Finland (ATOF)

5. Identify the target groups of domestic tourism and develop the tourism offering aimed at the target groups.

Responsibility: Ministry of Economic Affairs and Employment, regional organisations, enterprises

6. Develop the accessibility of tourism services and websites and communicate about them.

Responsibility: Ministry of Economic Affairs and Employment, regional organisations, enterprises

7. Develop quality and hospitality competences through quality systems and through the internationalisation, product and thematic criteria of Visit Finland.

Responsibility: Visit Finland, regional organisations, enterprises, research, education and training organisations, regional development companies

7.1.2 Develop tourism services in a theme-based manner to achieve a more even seasonal spread

Inbound tourism will be promoted under the leadership of Visit Finland through theme-based product development and marketing. The selected themes will support each other. The themes will support each other and the theme-based approach will also be promoted through cooperation between themes. The themes will support the achievement of a more even seasonal spread and longer seasons and the creation of cooperation in regions and greater regions and, more strongly also between greater regions, for example through tourism routes. The themes will also support the development of products and marketing targeted at domestic tourists. Alongside the themes specified, new emerging target groups and niche themes will be identified, and enterprise networks will be encouraged to make new initiatives and experiments relating to these.

8. a. Nature tourism

Nature as an environment enables diverse activities (including cycling, fishing and hunting) around the year on land, in water and in the air. Ensuring and anticipating the sustainability of nature must be taken into account in all activities, product development and communications. Developing sustainable nature tourism (including wilderness tourism) and utilising national parks will be core actions to increase inbound tourism demand. The services of national parks and other state-owned nature areas will be productised from the perspective of tourism needs, and cooperation with tourism enterprises utilising these areas will be

strengthened. The Sustainable Travel Finland label will steer tourism enterprises towards considering their own choices from the point of view of sustainable development and towards acting accordingly. Enterprises profiled as selling sustainable tourism products will be favoured in the distribution and sales channels of nature tourism products. Product development and marketing will aim to extend the duration of stay of nature tourists.

Responsibility: Visit Finland, Metsähallitus, Ministry of the Environment, Ministry of Agriculture and Forestry, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

b. Cultural tourism

Finnish cultural life, museums and cultural heritage sites, creative industries (such as music, festivals, audiovisual and film industry, architecture, design) and cultural environments provide a diverse foundation for strengthening sustainable and year-round cultural tourism throughout Finland, including outside growth centres. Finland's country image for cultural tourism will be strengthened by investing in the development of responsible tourism based on the cultural strengths of the regions and in the creation of European thematic cultural routes. Increasing cultural awareness of Finland requires the sustained building of the country brand and a consistent message, support for productisation, restoration and management of sites, and stronger networked cooperation between cultural tourism operators and cultural, tourism, research, education and training organisations. Finland will stand out from the offering of countries traditionally known for their culture (such as Italy and France) thanks to its originality and cultural environments.

Responsibility: Visit Finland, Metsähallitus, Ministry of Education and Culture, Ministry of the Environment, Ministry of Agriculture and Forestry, Ministry of Economic Affairs and Employment, Finnish Heritage Agency, research, education and training organisations, enterprises, regional organisations

c. Luxury tourism

While luxury used to be accessible only by the few, today's luxury customer segment is broader and the new intangible luxuries are a good match to the Finnish tourism offering. Finland is renowned for its clean air, safety and security, and happiness. Our natural phenomena, unique experiences and special types of accommodation appeal to an international target group as well as to markets that are new for us. The aim is to strengthen networks of actors for nationwide coverage, diversify the service provision of the summer season and increase awareness of Finland as a luxury destination. The role played by customer experiences in the reputation of luxury tourism destinations and products must be recognised and the customer experience strengthened by developing the hospitality-based service culture, for example through training.

Responsibility: Visit Finland, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

d. Health and wellness tourism

Finland is excellently equipped to offer high-quality health care as well as wellbeing holidays tapping into our nature and culture. Increasing awareness of Finland as a destination for health and wellbeing tourism requires sustained country branding and a coherent message. Developing a service ecosystem and clearly productised service packages around the theme as well as ensuring the functioning of the service chain will also be essential elements in the promotion of Finnish health and wellbeing tourism.

Responsibility: Visit Finland, Ministry of Economic Affairs and Employment, Ministry of the Environment, Ministry of Agriculture and Forestry, Metsähallitus, research, education and training organisations, enterprises, regional organisations

e. Education tourism

Despite Finland's strong education brand, the economic potential of education tourism has not yet been fully utilised. The aim is to place a

particular marketing focus on the special features of Finnish education, such as the phenomenon-based and solution-based approach to learning, doing things in nature, playful learning and personal learning paths, and to identify new areas of expertise, such as sustainable development, circular economy and English as a foreign language. A large number of new education tourism products have been created in recent years. It is important to establish clear quality criteria for education tourism products and to encourage actors offering new education tourism products to utilise product development and internationalisation coaching.

Responsibility: Visit Finland, Ministry of Education and Culture, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

f. Sports and physical activity tourism

Awareness of Finland as a destination for sports and physical activity tourism must be increased through marketing and product development. Close cooperation between sports institutes, ski resorts, sports federations and regional tourism organisations will be further emphasised, and it will be possible to create services that attract leisure tourists alongside those training professionally. Sports tourism products can be used to develop the year-round spread of tourism in many regions. The importance of physical activity as a pull factor for tourism must be highlighted.

Responsibility: Visit Finland, Ministry of Education and Culture, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

g. Gastronomy tourism

Food is a cross-cutting component in the tourism offering of various themes and regions but it is also more strongly a growing tourism theme in its own right. Finland has the potential to attract interest by focusing strongly on food from the clean natural environment and experiences based on it, the special features of our food culture that reflect the Finnish lifestyle, and our innovative and distinct restaurant culture. Attracting interest requires strong communications, production and packaging of new gastronomy tourism products, cooperation between actors and

competence building. The restaurant sector will also need to be integrated more closely into product development and marketing. Cooperation between food exports and gastronomy tourism benefits both parties and its strengthening should be continued both at the regional level and in activities taking place in target markets.

Responsibility: Visit Finland, Ministry of Agriculture and Forestry, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

h. Events and conferences

Finland will be marketed and Finland's image strengthened internationally as a stable, reliable and well-functioning host country for major events, conferences and business events. The marketing focus will be on Finland's strengths, which include long experience and a reliable reputation as an organiser of international events, excellent transport connections, consideration for sustainability, the diversity of service providers, infrastructure and venues, and high service quality, safety and security. The economic impact of the conference and events industry is significant. Conferences offer opportunities for sharing information rapidly, for showcasing and marketing Finnish science and expertise and for exports. Finland will lead the way with regard to the sustainability of conferences and business events and will continue to invest actively in promoting sustainable development and responsibility.

Responsibility: Visit Finland, Ministry of Education and Culture, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations

i. Tours

Tours are the most popular form of inbound tourism to Finland in the summer. The majority of inbound tourists explore our country by touring multiple destinations, which means tours form the basis of the summer offering of all tourism areas. Tours also offer opportunities for cooperation with the Nordic countries and neighbouring regions (including the Baltic States). Packaging suggested routes and services along routes into clear, sellable packages utilising electronic channels involves enormous

potential for tourism actors. Making use of the various themes (culture, food, wellness, camping tourism, etc.) in development work will be a key component in the promotion of tour-based tourism. There is also potential for growth in the development of new tour products and themes, for example on the basis of low-emission mobility.

Responsibility: Visit Finland, Ministry of Agriculture and Forestry, Ministry of the Environment, Ministry of Education and Culture, Ministry of Economic Affairs and Employment, Metsähallitus, research, education and training organisations, enterprises, regional organisations, tourism route associations

j. Family tourism

Family tourism is one of the world's most popular forms of tourism. Be they amusement parks or activities suitable for families with children ranging from canoeing and hiking to downhill skiing, family-friendly products constitute a high-pull basis for a year-round tourism offering. The aim is to increase awareness of Finland as a family destination also outside of the neighbouring countries, to diversify service packages and to take better account of other themes (food, activities, culture, etc.) in service concepts.

Responsibility: Visit Finland, Ministry of Economic Affairs and Employment, research, education and training organisations, enterprises, regional organisations, Metsähallitus

7.2 Digitalising the tourism sector

The impact of digitalisation on the business activities of tourism enterprises is growing rapidly. The global development of digital channels will significantly shape the tourism sector, which is facing the biggest challenge and, on the other hand, the greatest opportunity in its history due to globalisation, digitalisation and the global platform economy brought about by digitalisation. This will enable Finnish tourism destinations and services to compete genuinely with a number of international actors. Understanding of digitalisation and competence development are essential components of the digital reform of the tourism sector. Sufficient

competence will make it easier for enterprises to gain international visibility for their services through reasonably easy technical solutions. On the other hand, competition for international customers is increasing all the time, so inputs into visibility will be increased significantly. Finland's offering of tourism services must be compiled into a national information resource (including an online inventory) that is easy to distribute through multiple sales channels that reach tourists and enable conversion to sales. The information resource will also facilitate the management of the various channels and platforms for actors providing tourism services. The information resource will be a shared tool for the tourism industry to improve the visibility of Finnish tourism services, an effort which requires the commitment of all actors.

However, digital buyability, findability and discoverability of tourism services will not be enough. Instead, the use of digital solutions in tourism products and services must also be developed. Digitalisation can also bring significant improvements to the internal production process and production planning and control between functions. Digital accessibility requires improving the digital competence of the various actors, the online presence of the industry, and the functionality of services. It is important for digital channels and tourism services that utilise digitality to take accessibility into account. As part of the development of digital services, the openness of information and access to geospatial data via open interfaces should be promoted. In addition to data available on mobility services, data on tourism services is also needed. An electronic traveller registration form would facilitate progress in digitalisation. Measures for the development and marketing of tourism will be increasingly targeted directly at the end consumer, and demand development must therefore also take into account the change in the selection of appropriate distribution channels.

Coordinated by Visit Finland and updated annually in cooperation with the tourism sector, Finland's digital roadmap for tourism will show the direction for the industry's joint actions, specify the roles of the various actors and present the digital development measures that will put the digital competences and services of the Finnish tourism industry on a par with competitor countries. Digitalisation in the tourism sector will promote the discoverability, findability, buyability and experientiality of tourism services. The implementation of the digital roadmap for tourism will support the implementation of the Tourism Strategy.

7.2.1 Digitalise tourism products and services and hone digital tourism marketing

9. Establish a national tourism service information resource for utilisation at interfaces.

Responsibility: Visit Finland, Business Finland, regional organisations, enterprises

10. Increase the use of digital solutions in tourism products and services, promoting the updatability of information, equality of services among different target groups and improved cost-effectiveness.

Ensure the solutions support experientiality and, on the other hand, also help to communicate, for example, about the environmental impacts of a product or service.

Responsibility: enterprises, regional organisations, Visit Finland, Metsähallitus

11. Develop the nationalparks.fi and excursionmap.fi digital communication services technically and in terms of content and produce materials for use in the tourism industry's marketing and communications.

Responsibility: Metsähallitus

7.2.2 Develop digital competences in the tourism sector

12. Support the strengthening of the competences of tourism enterprises, regional organisations and destination marketing organisations (DMOs) in line with the Digital Pilot operating model by disseminating best practices to make them a national approach.

Responsibility: Visit Finland, regional organisations, enterprises

13. Increase training aimed at tourism enterprises to strengthen digital competences.

Responsibility: research, education and training organisations, regional development companies, interest organisations

- 14. Encourage tourism enterprises towards innovative traveltech initiatives, implementation of open data interfaces (API) in tourism services, and hackathons in Finland and internationally. Continue the Digital Pilot activities to inspire new digital ecosystems.**

Responsibility: Business Finland

7.3 Accessibility supporting tourism service growth

Good transport connections (rail, road, sea and air) are essential for Finnish tourism. Not all sections of the Finnish rail network are up to date. The need to cut carbon dioxide emissions will emphasise the importance of the electrified rail network in tourism as well as the development of passenger transport services. Private cars are used commonly on domestic journeys because they are the only way to conveniently reach many tourism destinations. In addition, during school holidays, access to tourism destinations outside centres in particular is poor using public transport. Improving the condition of the road network (including the low-volume road network) and continuing to reduce the maintenance backlog are key measures also from the perspective of tourism. This also includes road safety issues. The importance of maintenance classifications is particularly important for winter tourism destinations. Tourism and air transport will be developed in cooperation between the authorities and the business community by maintaining a common situational picture, through long-term planning and improving operating conditions in a sustainable and growth-oriented manner. Enabling emission offsetting for customers is likely to increase enterprise competitiveness. Good flight connections, both to destinations abroad and within the country, are important.

The journey is part of the experience, and the aim should be to productise it in such a way that the tourist prefers the least environmentally harmful modes of mobility instead of the fastest one. Utilising the archipelago and nature destinations in tourism will require improved transport connections. Funding for the maintenance of national park and hiking area routes and for establishing hiking and snowmobile routes is important for the success of tourism enterprises. Route systems that are important for tourism need well-functioning infrastructure and signage. Cooperation between actors plays an important role in ensuring the quality and safety of routes. Another key dimension in accessibility is to have fixed and

wireless networks that meet the needs of information society, without which the opportunities offered by digitalisation cannot be utilised.

Tourism must be taken better into account when developing transport services. Tourism provides transport with economic benefits and increases profitability. The best results and savings in transport development can be achieved through effective coordination of the needs of local and tourism transport. The functioning of transport connections is part of the journey and, at the same time, part of the tourist's experience of the quality of their trip. Travelling is attractive when transport as well as modal and intermodal interconnections function smoothly. Rail, road, sea and flight connections should be as seamlessly interoperable as possible to ensure smooth travel chains. It will be equally important to achieve seamless accessibility of information, that is, how tourists can easily find information about alternative transport services, routes, timetables and prices. Efficient signposting from main roads to tourism destinations and access to parking are key components of smooth mobility. The availability of high-quality campsite services in the vicinity of facilities such as ports and border crossing points is also integral to the smoothness of travel.

The adoption of Mobility as a Service operations must be strengthened. The legislative reform of the transport sector will enable more flexible provision of transport services and the compilation of different modes of transport to provide tourists with an easy travel chain. This will make it easier for tourists to buy tickets and plan their journeys.

7.3.1 Develop accessibility while taking the tourism sector's needs into account

15. Promote new, especially direct, flight connections throughout the country through means including cooperation and marketing.

Responsibility: regional councils, municipalities, regional organisations, Finavia, Visit Finland

16. Promote the elimination of any restrictions on competition through air transport agreements and regulation.

Responsibility: Ministry of Transport and Communications, Finnish Transport and Communications Agency Traficom

- 17. When preparing and implementing the National Transport System Plan, examine the accessibility of the regions as a whole, taking into account the mobility needs of citizens and businesses.**

Responsibility: Ministry of Transport and Communications, Finnish Transport and Communications Agency Traficom, Finnish Transport Infrastructure Agency, Centres for Economic Development, Transport and the Environment, municipalities

- 18. Ensure the functionality of route systems of importance for tourism (outdoor recreation routes, cross-country skiing trails, nature trails, snowmobile routes) and the infrastructure supporting them as well as safe signposting for the routes. Take route safety into account throughout route life cycles (e.g. maintenance responsibilities, multi-functionality, adverse effects on third parties).**

Responsibility: Ministry of the Environment, Ministry of Agriculture and Forestry, Ministry of Transport and Communic

- 19. Seek to enable the implementation of appropriate, affordable broadband connections that meet current and future information society needs throughout Finland.**

Responsibility: Ministry of Transport and Communications, Ministry of Agriculture and Forestry, regional councils, Centres for Economic Development, Transport and the Environment

- 20. Implement a national snowmobile infrastructure supporting sustainable nature tourism and a permanent funding and administration system for its maintenance.**

Responsibility: Ministry of Environment, Ministry of Agriculture and Forestry, regional councils, municipalities, Centres for Economic Development, Transport and the Environment

7.3.2 Strengthen Mobility as a Service operations

- 21. Monitor the functioning and application of the legislative reform of the Finnish transport sector. Ensure particularly that transport services arranged by the public sector can easily be integrated into travel chains.**

Responsibility: Ministry of Transport and Communications, Finnish

Transport and Communications Agency Traficom, Centres for Economic Development, Transport and the Environment, regional councils, municipalities, enterprises

22. Support the establishment of travel chain experiments as permanent functions, paying attention to opportunities for generalising pilots.

Responsibility: Ministry of Transport and Communications, Finnish Transport and Communications Agency Traficom, Centres for Economic Development, Transport and the Environment, regional councils, municipalities, enterprises

23. Compile and share best practices on implementing Mobility as a Service in tourism.

Responsibility: Ministry of Transport and Communications, Finnish Transport and Communications Agency Traficom, Centres for Economic Development, Transport and the Environment, municipalities, enterprises

7.4 Ensuring an operating environment that supports competitiveness

Cooperation and close networking between tourism actors will enable turning international attention in particular into new growth and jobs in Finland. Achieving ambitious objectives in tourism promotion and in Finland's tourism as well as commercial country image development requires responsible resourcing. Boosting the sector's competitiveness and coordinating tourism development measures calls for closer inter-administrative cooperation.

Global and national growth in tourism has increased the importance of knowledge-based management. Knowledge-based management links research data not only to political decision-making but also to strategic management of tourism areas and enterprises. For example, marketing inputs should be directed more strongly on the basis of knowledge, and the effectiveness of inputs should be assessed. Strong investment is needed in research, innovation and foresight that support the development of the tourism sector. The tourism sector covers many different disciplines, which is why tourism research is also multidisciplinary in nature. From

the industry perspective, research must respond to the information needs of tourism enterprises and promote the commercialisation of ideas. There is an urgent need for a comprehensive set of indicators to assess the sustainability of tourism and to monitor the effectiveness of digital marketing. Measuring the impact of tourism as a whole must be developed and international measurement models (such as sustainability in tourism satellite accounting) applied more efficiently.

A competitive operating environment and profitable business activities are in the interests of Finland as a whole. Legislation governing tourism entrepreneurship is fragmented and complex, as the sector is affected by regulations and measures of various administrative branches. Legislation must support entrepreneurship and multiple forms of and opportunities for employment. In order to maintain Finland's competitiveness in tourism, consumption taxes must be kept at a level that is competitive in European comparison. Public authorities' practices must be developed so that foreign entrepreneurs operating in Finland will receive improved advice on how to operate in Finland with regard to aspects such as increasing the safety of tourism services. Public authority control can also be made more efficient. In land use planning and in the comprehensive reform of the Land Use and Building Act, it is essential to take into account the needs of tourism and to secure its operating conditions.

The rise of the sharing and platform economy has increased the provision of accommodation and other services by private individuals. In many cases, the sharing economy has transformed towards professional business taking place on platforms. The operating models of the platform economy challenge the regulatory environment, for example with regard to market access requirements, taxation, employment and consumer protection. Independent tourists use tourism services and resources independently instead of buying guided services, often even without contacts with local service providers. In such cases, guidance and advice to ensure safety as required by the Consumer Safety Act may be insufficient. The service provider's obligation under the Act to assess the consumer's abilities and characteristics as regards acting safely may also not be fully complied with. The effects of the sharing and platform economy on the tourism sector will be actively monitored and any necessary measures will be taken to ensure equal treatment of actors in the sector.

Focusing on tourism investments and attracting foreign investment are important to boosting competitiveness. Tourism investments will increase Finland's attractiveness and improve the provision of tourism services and related infrastructure. In addition, the operating conditions of tourism enterprises can be improved by promoting investments in the infrastructure of tourism areas (such transport connections and energy efficiency), which does not distort competition between enterprises.

In Finland, the season is short for enterprises providing summer tourism services, and its timing is in part wrong. The best holiday months for Europeans are July and, in particular, August. Finnish schools begin the autumn term in mid-August, which is when most summer tourist destinations in practice have to close their doors. Foreign customers alone do not provide enough volume for these enterprises to operate profitably. Moving Finnish school summer holidays so that they would start and end two weeks later than at present would have a significant economic impact on the sector. The next step in the discussion on the topic should be an in-depth look into the impacts in the school context alongside the economic impacts.

Challenges in finding skilled labour have become an obstacle to the growth of more and more tourism enterprises. Factors behind the recruitment problems include applicants' skills shortages, difficulties in finding job vacancies, inactivity traps, the industry's low profitability, irregular and seasonal work, and problems related to finding housing. It is essential to strengthen and diversify education and training, develop the labour market dynamics on the basis of research findings, support occupational and geographical mobility and sufficient access to skilled tourism workforce at the right time in the right place. It is also important to take the wellbeing and services of employees and their families more extensively into account. Enterprises' competence needs are best met by short-term, flexible and working life-oriented training. Special attention must be paid to the training and induction of employees. The recruitment and employment of international labour will be promoted by developing recruitment processes, encouraging enterprises to recruit international talents and providing students arriving in Finland with career path opportunities right from the beginning of their studies.

7.4.1 Strengthen effective cooperation in the tourism sector

24. Formulate and launch an inter-administrative strategic programme for tourism

Responsibility: Ministry of Economic Affairs and Employment, ministries

25. Increase the funding allocated to Business Finland/Visit Finland for tourism promotion, in cooperation between central government and tourism enterprises, to make it competitive with the tourism promotion budgets of competitor countries.

Responsibility: Ministry of Economic Affairs and Employment

26. Appoint the high-level inter-ministerial working group (MiniMatka) with representatives of key stakeholders, including interest organisations. The remit of the working group will be to develop tourism and coordinate measures on a broad scale.

Responsibility: Ministry of Economic Affairs and Employment

27. Market Finland in the international market using Visit Finland's greater regions cooperation model to create more coherent messages and increase overall investment. There are four greater regions: Lapland, Finnish Lakeland, Coast and Archipelago, and the Helsinki Metropolitan Area.

Responsibility: Visit Finland, regional organisations, enterprises

28. Participate actively in tourism cooperation between the EU Member States, the Nordic countries and the OECD countries as well as the Baltic Sea, Barents and Arctic region in order to promote the objectives and contents of the Tourism Strategy and make tourism smoother.

Responsibility: ministries, Visit Finland, regional councils, research, education and training organisations, regional organisations, enterprises, interest organisations

- 29. Encourage the tourism sector to make use of the entire service provision (networking, funding) of Business Finland in internationalisation, with the internationalisation needs of the tourism sector taken into account in the development of the service provision.**

Responsibility: Business Finland, research, education and training organisations

- 30. Increase the efficiency of international tourism marketing by stepping up Team Finland cooperation.**

Responsibility: Visit Finland, Business Finland, Ministry for Foreign Affairs, Ministry of Economic Affairs and Employment and other Team Finland actors

7.4.2 Invest in knowledge-based management

- 31. Implement a digital information service for knowledge-based management in the tourism sector (platform, analytics, information sharing) at the national level.**

Responsibility: Ministry of Economic Affairs and Employment, Business Finland

- 32. Develop quantitative and qualitative statistics on tourism, data compiling and the measurement and monitoring of the impacts of tourism at the national and regional levels.** On themes including the following: monitoring of the sustainability of nature tourism, environmental impact assessment, monitoring and foresight, monitoring of accidents and incidents and self-monitoring relating to safety in tourism services, and utilising big data (such as mobile phone operators' location data) in tourism statistics.

Responsibility: Ministry of Economic Affairs and Employment, Business Finland, Visit Finland, Statistics Finland, research, education and training organisations, regional development companies, Metsähallitus, Finnish Safety and Chemicals Agency (Tukes)

33. Study the spending and travel behaviour of inbound tourists in Finland.

Responsibility: Ministry of Economic Affairs and Employment, Visit Finland, Statistics Finland

34. Measure the impacts of tourism on regional economy.

Responsibility: Ministry of Economic Affairs and Employment

35. Develop the calculation of the carbon footprint of the tourism industry at the national level.

Responsibility: ministries, research, education and training organisations

36. Develop the measurement, monitoring and assessment of responsibility in tourism, taking into account the goals and targets of the 2030 Agenda in particular.

Responsibility: ministries, Business Finland, Visit Finland, Statistics Finland, research, education and training organisations, Metsähallitus

7.4.3 Legislation, land use and operating culture supporting sustainable growth in tourism

37. When drafting legislation, conduct business impact assessments, taking into account tourism enterprises of different sizes and their equal treatment, also in relation to actors in the sharing and platform economy.

Responsibility: ministries

38. Develop new public authority control practices with a "from control to coaching" approach.

Responsibility: municipalities, Centres for Economic Development, Regional State Administrative Agencies, Finnish Safety and Chemicals Agency (Tukes), Finnish Food Authority

- 39. Develop statutory and other land use planning conducted at different levels so that the needs of the tourism industry, too, will be taken into account (e.g. business coordination, streamlining of processes), influence the comprehensive reform of the Land Use and Building Act.**

Responsibility: Ministry of the Environment, regional councils, Centres for Economic Development, Transport and the Environment, municipalities

- 40. Implement, as measures necessary due to the impacts of the sharing and platform economy on the tourism industry, for example, the definition of professional and non-professional activities and increase consumer/customer safety through means including guidance, training and information aimed at service providers.**

Responsibility: ministries, Finnish Safety and Chemicals Agency (Tukes)

- 41. Continue granting the production incentive for the audiovisual industry.**

Responsibility: Ministry of Economic Affairs and Employment, Business Finland

- 42. Promote investments in the tourism industry; attract foreign investment, invest not only in accommodation capacity but also in the content of tourism products and business development of enterprises.**

Responsibility: Business Finland, Centres for Economic Development, Transport and the Environment, regional development companies

- 43. Study the societal impacts of moving school summer holidays in the school context alongside the impact on the national economy and launch the necessary measures based on the results.**

Responsibility: Ministry of Employment and the Economy, Ministry of Education and Culture

7.4.4 Ensure access to skilled labour

- 44. Improve the image, appreciation and attractiveness of the sector in order to secure a skilled workforce throughout the year through cooperation between administrative branches.**

Responsibility: Ministry of Economic Affairs and the Economy, Ministry of Education and Culture, research, education and training organisations, interest organisations, Employment and Economic Development Offices, enterprises

- 45. Promote the recruitment and employment in the tourism industry of international labour.**

Responsibility: Ministry of Economic Affairs and Employment, Employment and Economic Development Offices

- 46. Strengthen and diversify flexible opportunities for competence development in a working life-oriented manner in training towards a qualification or part qualification at all levels of education, in apprenticeship training and continuing training.**

Responsibility: Ministry of Education and Culture, Finnish National Agency for Education, Ministry of Economic Affairs and the Economy, research, education and training organisations, Employment and Economic Development Offices, interest organisations

Appendix 1. Definition of tourism and description of the tourism cluster

Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business or other purposes. Tourism also comprises activities such as trips taken by same-day visitors outside their place of residence or employment. The key tourism industries are accommodation and food and beverage serving services, passenger transport services, travel agency and tour operator services, cultural services (such as events, museums, historical attractions, zoo and nature reserve activities), and sports and recreation services (such as the activities of ski resorts, amusement and theme parks, and spas).

Industries that are directly connected to tourism include real estate and equipment maintenance, security, daily consumer goods trade, specialised store trade, construction and building project development services, ICT services, food production and processing, and waste management. Tourism also has impacts on municipalities' basic duties, such as medical care, rescue services, building control, statutory land use planning, and municipal engineering services. In addition, tourism industries generate demand for industries such as communications and office support services (such as accounting and auditing). Entrepreneurship in the tourism industry alongside agriculture and forestry enables access to additional income, especially in rural areas.

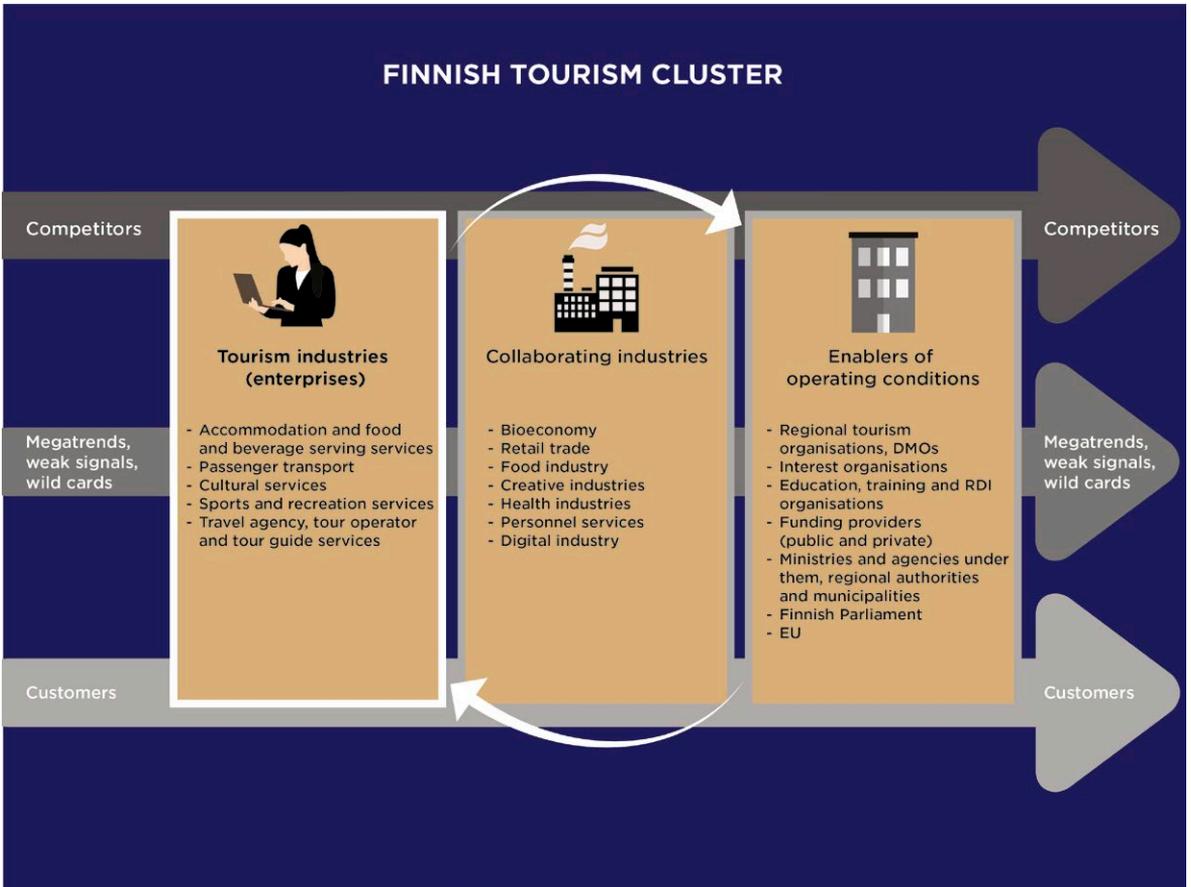


Figure 7. Finnish tourism cluster
 Source: Ministry of Economic Affairs and Employment

Appendix 2. Process employed to update the Tourism Strategy

The Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025 was prepared during 2014 through a broad and inclusive process. Updating the roadmap became topical following around four years of implementation. The outcomes of the roadmap were monitored in autumn 2018, focusing on progress made towards the measures specified in the Roadmap. The four years had seen the completion of some of the roadmap's measures and many changes had taken place in the operating environment, in the light of which the roadmap and its measures required updating.

In the 2019 update process, the contents and measures of the roadmap were updated to better reflect the current situation. The contents were made more concise, restructured and clarified. In the update process, the Roadmap for Growth and Renewal in Finnish Tourism was renamed the Finnish Tourism Strategy. In the following, 'roadmap' refers to the document published in 2015 and 'strategy' to the updated roadmap.

Views of a broad range of stakeholders were collected for the update. Stakeholder consultations took place with interest organisations in the tourism sector (Service Union United PAM, Finnish Hospitality Association MaRa, Association of Finnish Travel Industry SMAL, Service Sector Employers Palta, Central Union of Agricultural Producers and Forest Owners MTK). In addition, the update process was presented at a number of stakeholder events. Views on updates to the roadmap were collected, for example, from the personnel and Management Group of Visit Finland, the network of regional experts and representatives of the greater regions (Coastal and Archipelago, Helsinki Metropolitan Area, Lapland and Finnish Lakeland). Recent studies and surveys in the tourism sector were also taken into account in the background work. On the basis of this work, a draft of the Finnish Tourism Strategy was prepared, with comments invited during an open round of comments.

The comments received, totalling more than 500, were reviewed. The proposals for amendments made in the comments were evaluated and, if necessary, discussed with the relevant responsible parties. Based on the feedback received, the Tourism

Strategy was made more concise, the measures were adjusted and the responsible parties clarified. The inter-ministerial working group on tourism (MiniMatka) provided its comments on the draft strategy.

The Tourism Strategy was considered by the Senior Government Officials Management Group of the Ministry of Economic Affairs and Employment.

Appendix 3. Explanations and sources of quantitative indicators used in the Tourism Strategy

Tourism demand indicates the amount of money spent on tourism services and products during the year. The three subcomponents of tourism demand are inbound tourism demand, domestic leisure tourism demand and other domestic tourism demand, which includes reimbursement for work-related travel expenses, and the mathematical value of owner-occupied holiday cottage use. Total tourism demand includes consumption expenses of domestic and inbound tourists in Finland. Source: Tourism Accounts.

Tourism exports or inbound tourism demand indicates the amount of money spent by inbound tourists on tourism services and products in Finland during the year. Source: Tourism Accounts.

Domestic tourism demand indicates the amount of money spent on tourism services and products by domestic tourists in Finland during the year. Source: Tourism Accounts.

Tourism direct value added as a share of GDP means the percentage of the value added generated by tourism of Finland's gross domestic product. In the light of tourism account figures, tourism value added has remained at around 2.5% of GDP since 2015. Source: Tourism Accounts.

Turnover of tourism cluster enterprises indicates the turnover of enterprises operating in accommodation, food and beverages and programme services, passenger transport, and rental and leasing included in the tourism cluster. The industries in the tourism cluster comprise accommodation services for visitors, food and beverage serving services, railway passenger transport services, road passenger transport services, water passenger transport services, transport equipment rental services, travel agencies and tour operator services, cultural services, and sports and recreational services. The core tourism cluster comprises accommodation, food and

beverage serving services, and programme services. Source: Annual sectoral report on tourism and Tourism Accounts.

Tourism employment indicates the employment effects of the tourism sector. The indicators for the employment impacts of the tourism industries are the number of jobs and the number of hours worked in each industry. Source: Tourism Accounts.

Registered overnight stays means overnight stays in accommodation establishments with at least 20 beds or caravan pitches with electrical connection points, as well as hostels. Source: Statistics Finland, Accommodation Statistics.

Finland's market share of inbound overnight stays in relation to other Nordic countries indicates Finland's share of inbound tourists' registered overnight stays in the Nordic countries. Source: Statistics Finland, Accommodation Statistics, and corresponding statistics produced by the other Nordic countries. Data compiled by Visit Finland.

Accommodation sales is the accommodation sales income (incl. VAT) reported by accommodation establishments. Source: Statistics Finland, Accommodation Statistics.

Total local economy income effects of visitors' spending in national parks, national hiking areas and other most popular sites means the direct and indirect annual income effects created in the local area. The method examines the impacts not only as regards all visitors but also separately as regards those visitors for whom the area examined was the primary reason for the trip. Source: Metsähallitus.

Number of visits to protected areas, hiking areas and nature centres of Metsähallitus indicates the number of annual visits to protected and hiking areas as well as nature centres of Metsähallitus. Source: Metsähallitus.

Finland's ranking in seasonality of inbound overnight stays compared with other Nordic countries is expressed by calculating the Gini coefficient of each country and ranking the Nordic countries in the order based on the results, with the country that received the lowest Gini coefficient ranked as number one. The Gini coefficient is usually used as a measure of income differences. For accommodation statistics, the Gini coefficient can be used to illustrate seasonal fluctuation in tourism. The

higher the value of the Gini coefficient, the more unevenly tourists' overnight stays are dispersed in the area over the year. The highest possible value of the Gini coefficient is 1. That means overnight stays only occur during one month over the entire year. The lowest possible value of the Gini coefficient is 0, which is when the number of overnight stays is exactly the same every month. For 2015, Finland's Gini coefficient at the nationwide level was 0.16, or around half of the Gini coefficient for the other Nordic countries. This means Finland is ranked number one in relation to the other Nordic countries. The aim is to maintain this ranking. It should be noted that regional variation within the country is high. Source: Visit Finland..

Appendix 4. Environmental impact assessment report (SEA) for the Tourism Strategy 2019–2028

The theme of the Tourism Strategy is Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism. This means the aim is to increase cooperation and achieve growth and renewal in tourism in a sustainable manner. Tourism is based on mobility, which generates its key environmental impacts. The World Tourism Organization (UNWTO) has estimated that emissions from tourism as a whole account for around 5 % of global carbon dioxide emissions. Emissions mainly originate from transport (75 %) and accommodation (20 %).⁸ The environmental impacts of mobility can, however, be minimised through a variety of actions such as developing the travel chains, utilising new technologies and biofuels, and investing in shared mobility forms. The environment can be taken into account in tourism destinations by, for example, using, where possible, locally produced food and raw materials and renewable energy, minimising wastage, utilising the circular economy and seeking savings in issues such as energy and water consumption.

The general obligation to assess environmental impacts laid down in section 3 of the Act on the Assessment of the Effects of Certain Plans and Programmes on the Environment (200/2005), the SEA Act) applies to the Tourism Strategy. The authority responsible for the plan or programme must ensure that the environmental effects of the plan or programme are investigated and assessed sufficiently during preparation if the implementation of the plan or programme may have significant effects on the environment.

In this environmental impact assessment, 'environmental impact' is understood in the broad meaning of the concept as defined in section 2 of the SEA Act. In this report, 'environmental impact' refers to any direct and indirect effects of the Tourism Strategy on 1) human health, living conditions, amenity and comfort, 2) soil, water,

8 UNWTO, 2017

air, climate, flora, fauna and biodiversity, 3) community structure, built environment, landscape, townscape and cultural heritage, 4) utilisation of natural resources and 5) interactions between factors specified under 1–4 above.

When the Tourism Strategy was updated, environmental considerations as part of sustainable development were taken into account as a cross-cutting principle throughout the process. The assessment report on the environmental impacts of the strategy was drawn up towards the end of the preparation process on the basis of the sets of measures determined for the strategy. Taking environmental considerations continuously into account as part of the promotion of sustainable growth is essential when implementing the Tourism Strategy.

The themes and measures of the Tourism Strategy have been classified under four key priorities, which are as follows:

- 1. Turning sustainability into a competitive asset for Finland's tourism**
- 2. Digitalising the tourism sector**
- 3. Accessibility supporting tourism service growth**
- 4. Ensuring an operating environment that supports competitiveness**

The environmental impacts of the measures were assessed through these four priorities. Overall, it can be said that, once realised, the measures will have a positive impact on human living conditions, amenity and comfort. Many of the measures will, once realised, improve people's opportunities to live and act sustainably. Many of the measures focus on the development of ways of doing things, cooperation and structures and on the exchange of experiences, whereby they will not have direct environmental impacts but will indirectly promote people's living conditions and wellbeing, sustainable activities in nature and cultural environments and growth in human and social capital.

1. Turning sustainability into a competitive asset for Finland's tourism

The priorities covered in the chapter are 1) steering tourism enterprises, tourism areas and tourists towards responsible choices and 2) developing tourism services in a theme-based manner to achieve a more even seasonal spread. Cultural, social, environmental and economic responsibility are recognised as the dimensions of responsibility. Responsibility is seen as a common interest for both the tourism sector and tourists.

The measures of the chapter will both directly and indirectly improve people's amenity and comfort, awareness of environmental issues and preparedness for environmentally responsible activities. In addition, the measures will increase consideration in activities for natural and cultural environments and heritage as well as for host communities. The measure aiming at the deployment of the Sustainable Travel Finland label will help disseminate a responsible approach extensively across the tourism sector. The measures also aim to develop thematic tourism, which will have positive effects on achieving a more even seasonal spread, creating year-round full-time jobs and the vitality of host economies. This, in turn, will have a positive impact on the sustainability dimensions of tourism. Activities utilising national parks and other nature destinations must ensure that the nature values of the area are preserved in the implementation of tourism policy measures. In order for tourism targeted at the network of nature reserves to increase significantly without threatening the sustainability of the areas, funding for the management and maintenance of the network as well as the monitoring of the management, usage planning and sustainability of the areas must be sufficient.

2. Digitalising the tourism sector

In the chapter on the digitalisation of the tourism sector, the priorities are 1) digitalising tourism products and services and honing digital tourism marketing and 2) developing digital competences in the tourism sector. The measures set out in the chapter are strongly linked to utilising technology, changing ways of doing things and increasing cooperation and competences. These will have a variety of positive impacts on human and social capital.

Electronic services generally reduce the need for mobility and cut emissions from transport, as things can be taken care of online. Producing experiences using artificial intelligence and virtual reality makes it possible to gain experiences without the need to move from one location to another. On the other hand, easier accessibility and buyability of tourism products and services online, as well as marketing measures, aim to increase tourism, which increases the environmental impacts of tourism.

3. Accessibility supporting tourism service growth

The priorities covered by the chapter on accessibility supporting tourism service growth are 1) developing accessibility while taking the tourism sector's needs into account and 2) strengthening Transport as a Service operations. Travel inevitably generates emissions, but tourists' opportunities to offset emissions have increased. The development of mobility opportunities for residents, entrepreneurs and tourists will have a positive impact on people's living conditions. The development of smooth travel chains will enable the more extensive use of public transport alongside private cars.

Road maintenance and repairs will have a positive impact on traffic safety and journey times and, consequently, on people's living conditions and health. The development of telecommunications connections will make it possible to take care of things electronically, reducing the need for mobility. The preparation of the National Transport System Plan takes into account the different modes of transport and also the needs of tourism, strengthening a comprehensive planned approach to mobility arrangements. The functionality of tourism route systems and infrastructure supporting them will improve safety, which will have a positive impact on people's health, amenity and comfort.

4. Ensuring an operating environment that supports competitiveness

The chapter on ensuring an operating environment that supports competitiveness covers the priorities of 1) strengthening of effective cooperation in the tourism sector, 2) investing in knowledge-based management, 3) legislation, land use and operating culture supporting sustainable growth in tourism and 4) ensuring access to skilled labour. The measures relating to the chapter will, for example, increase cooperation and the generation and utilisation of knowledge and information.

People networking with each other and doing things together helps increase social capital and has an indirect impact on living conditions, amenity and comfort. The generation and utilisation of knowledge and information will make it easier to measure and take into account the impacts of tourism in development work. The measure related to statutory and other land use planning promotes land use development so that the needs of the tourism industry are taken into account. It will help to create capacities for business development and job creation, which will

have a positive impact on people's access to income and wellbeing. Statutory land use planning can also ensure the reconciliation of livelihoods and taking nature and cultural values into account and preserving them. Measures aimed at ensuring access to skilled labour will promote people's access to income and wellbeing. The competence development measure will increase human capital.

Appendix 5. Employment and gender impact assessment report on the Tourism Strategy 2019–2028

Tourism has a significant impact on the economy and employment in Finland. In 2017, tourism directly generated 2.6 % of the gross domestic product and employed more than 140,000 people. In addition, temporary agency work is commonly used, estimated to amount to 6,000 full-time equivalents (FTE) in the hotel and restaurant sector. Tourism also provides employment to a lot of young people, who account for 30 % of the sector's employees. The importance of tourism is increased by the sector's location-specific nature; most tourism jobs and locally performed development work cannot be relocated to other countries or localities. The employment opportunities provided by the tourism sector support the vitality of regions. The role of tourism is emphasised locally, especially in connection with tourism centres located in rural and archipelago areas. Tourism may offer opportunities for employment and entrepreneurship to replace shrinking sectors (such as public and private services; banks, trade, administration). Tourism will remain labour-intensive also when the use of technology and service accessibility increase.

Challenges in finding skilled labour have become an obstacle to the growth of more and more tourism enterprises. Factors behind the recruitment problems include applicants' skills shortages, difficulties in finding job vacancies, inactivity traps, the industry's low profitability, irregular and seasonal work, and problems related to finding housing. It is essential to strengthen and diversify education and training, develop the labour market dynamics on the basis of research findings, support occupational and geographical mobility and sufficient access to skilled tourism workforce at the right time in the right place. It is also essential to take the wellbeing and services of employees and their families more extensively into account.

In addition to the individual perspective, it is important to dismantle the segregation that prevails in Finland into men's and women's sectors also because traditional gender-based occupation choices do not often match the need for

labour in the regions. In 2016, 56 % of service-sector students were female and 44 % male. Consequently, the service sector is regarded as a non-segregated sector where the number of female and male students is distributed more evenly than in strongly segregated sectors. However, an examination of the various fields of study in the service sector shows that women account for 80 % of tourism students and 67 % of students of hotel and restaurant studies.⁹ The tourism sector is often perceived as a sector employing women and young people in particular, especially in accommodation and food service jobs. According to the Statistics Finland Labour Force Survey, the percentage of women among those working in accommodation and food service activities is considerably larger than that of men. During 2016–2018, the industry employed around twice as many women as men. From the gender diversity perspective, it should be noted that statistics take diversity in gender into account only in a limited manner, which means the statistical data available is only limited to the distribution of women and men.

Employed persons and employees and hours worked, 15–74-year-olds, with Gender, Year, Industry 2008 and Data as variables

Source: Statistics Finland, Labour Force Survey 2018

I Accommodation and food services (55-56)	2016	2017	2018
Employed, thousand persons			
Total	85	85	86
Male	27	26	28
Female	58	59	58

In this assessment, employment and gender impacts mean direct and indirect impacts of the Tourism Strategy on 1) demand of labour in the tourism sector, 2) supply of labour in the tourism sector, 3) demand and supply of labour in other sectors, 4) realisation of gender equality and 5) interactions between factors specified under 1–4 above. Because there is no single established model for gender impact assessments, the assessment of the gender impacts of the Tourism Strategy was conducted on the basis of employment data. This choice is in line with the roles of the Ministry of Economic Affairs and Employment. It is,

⁹ Keski-Petäjä & Witting, 2018: Fewer than one in five students studies in a field with an equal distribution of women and men – segregation in fields of study continues (in Finnish only: Alle viidennes opiskelijoista opinnoissa joissa tasaisesti naisia ja miehiä – koulutusalojen eriytyminen jatkuu)

however, possible that gender may be linked with other impacts, too, or gender impacts may occur on their own. Due to the model not being an established one, the employment and gender impact assessment of the Tourism Strategy also determined gender more broadly than the traditional sex assignment at birth (e.g. 'female'), although data such as statistics for the Statistics Finland Labour Force Survey is compiled on the basis of legal gender. In this assessment, gender diversity is taken into account by reference to gender identity, that is, the person's personal experience and expression of their gender.¹⁰

Updates to the Tourism Strategy will include an employment and gender impact assessment, as tourism employment is related to the industry's competitiveness and attractiveness and people's equal opportunities irrespective of gender to promote their wellbeing through competence development, employment, business activities and community inclusion. The assessment took place towards the end of the preparation process on the basis of the sets of measures determined for the strategy. When implementing the Tourism Strategy and its measures, it is essential to take employment and gender impacts into account as regards, for example, certain target groups (such as sexual minorities). Gender balance in participation in decision-making and development work are issues to which attention must be paid to achieve equality.

The themes and measures of the Tourism Strategy have been classified under four key priorities, which are as follows:

- 1. Turning sustainability into a competitive asset for Finland's tourism**
- 2. Digitalising the tourism sector**
- 3. Accessibility supporting tourism service growth**
- 4. Ensuring an operating environment that supports competitiveness**

Employment and gender impacts of the measures were assessed through the four priorities. In general, it can be said that many of the measures will, once realised, have a positive impact on employment and enterprise competitiveness in the sector. The measures will have a direct impact on employment as well as labour demand and supply in tourism. Many of the measures focus on developing ways of doing things, cooperation and structures, increasing and utilising knowledge and

¹⁰ Finnish Institute for Health and Welfare, 2019

information and exchanging experiences and therefore indirectly promote access to labour in the tourism sector, irrespective of gender.

1. Turning sustainability into a competitive asset for Finland's tourism

The priorities covered by the chapter are 1) steering tourism enterprises, tourism areas and tourists towards responsible choices and 2) developing tourism services in a more theme-based manner to achieve a more even seasonal spread. Cultural, social, environmental and economic responsibility are recognised as the dimensions of responsibility. Responsibility is seen as a common interest for both the tourism sector and tourists.

The measures set out in the chapter, such as investments made to promote responsibility in the tourism sector and communication about responsible activities will contribute towards direct as well as indirect increases in tourism demand and, consequently, the industry's employment effect. The measures also aim to develop thematic tourism, which will have positive effects on achieving a more even seasonal spread, which in turn will help create year-round full-time jobs. The chapter's measures will benefit all genders as regards positive employment effects.

2. Digitalising the tourism sector

The chapter on the digitalisation of the tourism sector covers the impacts of digitalisation on the business activities of tourism enterprises, the digitalisation of tourism services and products, the honing of digital tourism marketing, and the development of digital competences in the tourism sector. Digitalisation offers tourism enterprises opportunities to develop their business and visibility in the international market, but the change also calls for renewal and competence development of enterprises. The measures set out in the chapter for the digitalisation of tourism services and development of the sector's digital competences may be visible as employment needs in tourism enterprises which still have room for development in their digital visibility or the digital buyability of their products and services. The employment effects of the sector's digitalisation may, in addition, extend to enterprises in sectors such as ICT. The visibility of tourism enterprises in the international market will translate into inbound tourism demand for Finland, which in turn may have employment impacts. The utilisation of various platforms and social media channels as part of enterprise business activities

can be seen as positive employment effects, especially for young people who are experienced users of platforms and channels. The chapter's measures will benefit all genders as regards positive employment effects.

3. Accessibility supporting tourism service growth

The priorities covered by the chapter on accessibility supporting tourism service growth are 1) developing accessibility while taking the tourism sector's needs into account and 2) strengthening Transport as a Service operations. The development of mobility opportunities will have a positive impact on access to and mobility of labour, although the impact is typically assessed as being minor. The chapter's measures will have potential employment impacts on sectors such as passenger transport and novel transport operators combining various mobility services for customers. Well-functioning telecommunications connections enable remote working, which facilitates work-life reconciliation, although the link to access to labour is weak. The chapter's measures will benefit all genders as regards positive employment effects, although the rate of men in jobs such as passenger transport roles is greater than that of women.¹¹

4. Ensuring an operating environment that supports competitiveness

The chapter on ensuring an operating environment that supports competitiveness covers the priorities of 1) strengthening of effective cooperation in the tourism sector, 2) knowledge-based management, 3) legislation, land use and operating culture in tourism and 4) ensuring access to skilled labour. Of the chapter's measures, investing in knowledge-based management, new investments, and measures to ensure access to skilled labour in particular may be visible as direct and indirect employment impacts.

Improving the sector's image and attractiveness and developing the tourism sector's employer image may increase labour interest and supply in the sector. As a location-specific industry, tourism helps strengthen a balanced regional structure, which will also be seen as employment impacts. Tourism jobs and locally conducted development work cannot be relocated to other locations or countries.

11 Statistics Finland, Labour Force Survey 2018

The strengthening of the tourism sector may boost the total employment rate in declining regions with high unemployment as well as in urban areas and growth centres. It should, however, be noted that labour demand focusing on areas already suffering from scarce supply may mean less labour supply in another sector.

Developing recruitment processes for foreign labour and encouraging enterprises to recruit international talents will help to find solutions to the labour shortage in the tourism sector alongside measures to recruit labour from within Finland. A focus in the demand for labour on those with a native language other than Finnish or Swedish may strengthen employment among the immigrant population, whose labour market position is below average, and therefore potentially improve the total employment rate. The internationalisation of the sector from within (international personnel/workplace community) may also help to increase the attractiveness of the tourism sector and the supply of labour. Investing in flexible and diverse education and training opportunities and the competence development of personnel are likely to increase the supply of labour in the sector. Short-term tailored training or retraining or upgrading of qualifications increase employment and can contribute to the eradication of long-term unemployment, for example. The measures aiming at promoting competences, education and training and access to skilled labour will benefit all genders.

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Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism

Finland's Tourism Strategy 2019–2028 and Action Plan 2019–2023

Tourism has a significant impact on the economy and employment in Finland. Tourism is also a factor promoting a balanced regional structure. Unlocking the growth potential available calls for inter-administrative and target-oriented cooperation of tourism actors. Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism is Finland's national Tourism Strategy for 2019–2028. It emphasises the significance of cooperation in order to achieve sustainable growth and renewal in Finnish tourism.

The Tourism Strategy has been updated under the coordination of the Ministry of Economic Affairs and Employment. The Ministry is responsible for the priorities of Finland's tourism policy and coordinates development work together with other ministries and the sector's actors. The Tourism Strategy will be implemented by a large number of actors in collaboration.

Underpinning the Tourism Strategy is the Roadmap for Growth and Renewal in Finnish Tourism 2015–2025. The update was based on discussions with various stakeholders and comments received on the draft during an open round of comments. Recent studies and surveys in the tourism sector were also taken into account. An inter-ministerial working group on tourism had a key role in advancing the update.

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