



Visit Finland

Gateway to Growth

Visit Finland
Action Plan 2026–2030





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Foreword



Tourism is one of the fastest growing industries globally, and Finland has strong potential to capture its share of this growth. International interest in Finland and its distinctive travel experiences continues to increase, supported by global demand trends such as the appeal of a cooler climate and pristine nature.

At the same time, the operating environment for tourism has become more complex and increasingly uncertain. Geopolitical tensions and economic instability influence travel behaviour and destination choices, while climate change is reshaping travel flows and challenging the social acceptability of the tourism industry as a whole.

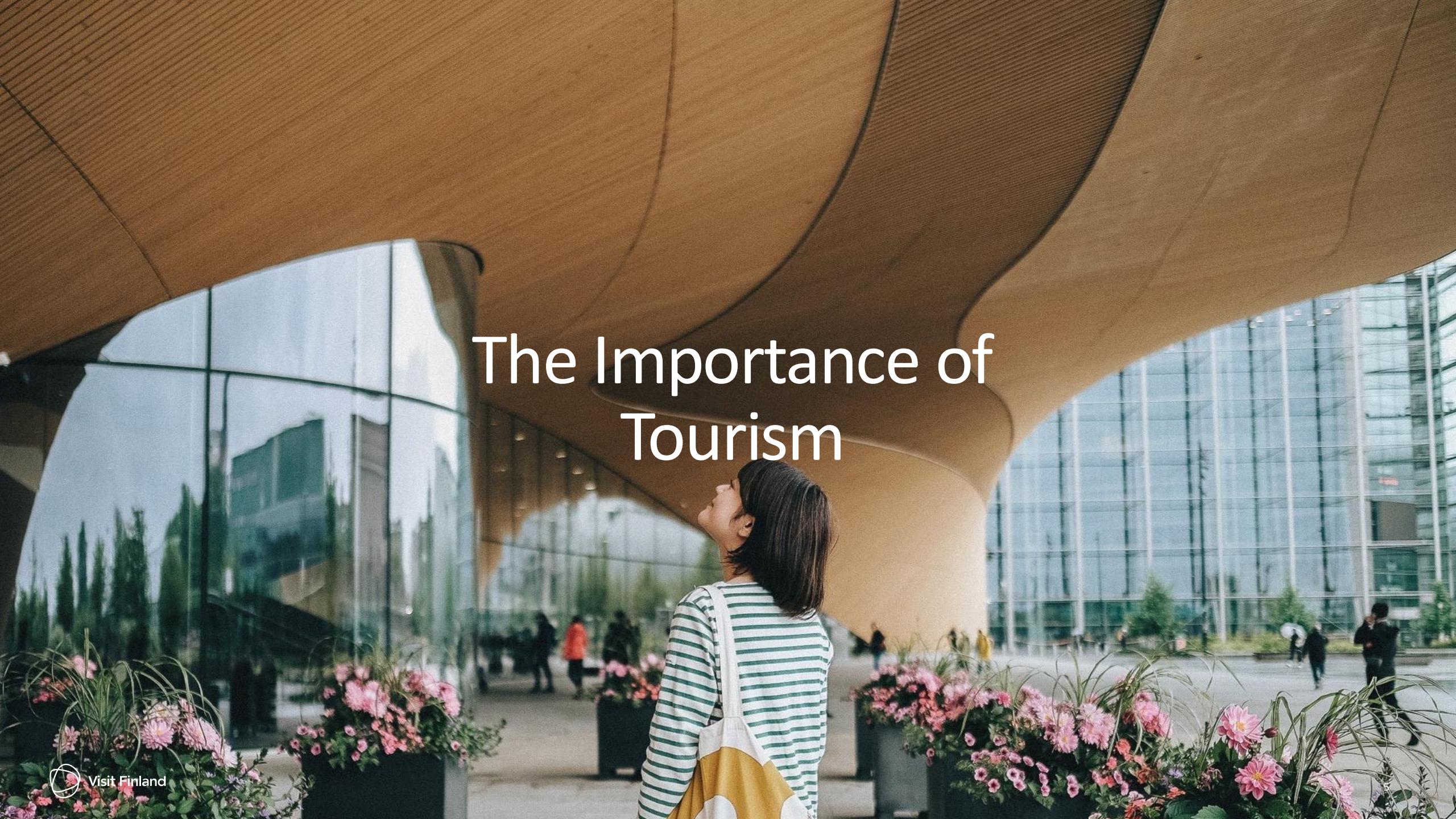
The resources allocated to tourism promotion have a direct impact on Finland's ability to respond to both opportunities and challenges. The current economic context calls for even more careful prioritization of Visit Finland's activities, as well as a systematic focus on effectiveness and impact.

This strategy provides a foundation for Visit Finland's work in the coming years. Its aim is to generate maximum added value for the Finnish tourism industry by strengthening international demand, competitiveness and long-term sustainability.

The strategy has been developed in close dialogue with our key stakeholders. Its successful implementation relies on committed, goal-oriented collaboration across the tourism ecosystem. Only by working together can we ensure that Finland remains an attractive, competitive and sustainable destination well into the future.

Tourism is one of the fastest growing industries globally.

Finland has strong potential to take its share of this growth.



The Importance of Tourism

The Importance of Tourism as a Driver of Finland's Competitiveness and Sustainable Growth



Other industries benefiting from tourism:

- Retail
- Health Care
- Food Industry
- Staffing and Employment Services
- Agriculture and Forestry
- Digital Services
- Creative Industries
- Construction

Tourism is a
Multi-Billion Euro
Business

Total Tourism Demand
€ 16.6 billion

International Tourism
Generated
€ 4.7 billion
IN EXPORT REVENUE

Tourism Employs
in Finland
146,600
PEOPLE

Tourism Industries

Industry	Number of Companies	Number of Employees	Revenue € billion
Hotels and other Accommodation Services	1,483	8,880	1.9
Passenger Transport	9,949	27,909.7	7.8
Cultural Services	11,318	3,620.5	0.85
Food and Beverage Services	11,947	47,019.9	6.5
Sports and Recreational Services	7,911	8,935.2	2.5
Travel Agencies and Tour Operators	2,411	3,171.8	1.5



Tourism is a Driver of Finland's Competitiveness and Sustainable Growth

Tourism is at the core of Finland's service industry.

Nearly €6 billion in export-equivalent revenue, about 150,000 employees, 29,000 companies.

Tourism has diversified Finland's economic structure. It has strong multiplier effects in transport, retail and construction.

Tourism creates opportunities for sustainable international growth for other industries and helps attract skilled labour, creates new jobs and encourages entrepreneurship.

At its best, tourism opens a gateway for Finland to integrate into global networks and communities.

Cities and communities develop through tourism. It boosts the vitality of city centres and attractiveness of rural areas. Tourism helps preserve transport infrastructure.

International tourism is a driver of growth, and so far, we have just scratched the surface.

In today's global economy, achieving sustainable growth requires **courage to invest** in industries that offer unlimited opportunities and long-term growth potential.

It's time to give tourism a central role in Finland's competitiveness and growth strategies.

Tourism is an emerging growth sector in the EU

According to the World Travel & Tourism Council (WTTC), tourism will become one of the EU's most strategically significant growth sectors by 2035:



Share of GDP is expected to rise to **nearly 11%**



4.5 million new jobs – one in seven new jobs will be in tourism



Tax revenue will exceed €900 billion

STRATEGIC OPPORTUNITY:

Finnish Tourism Growing Faster than the Global Economy

4.7 %

3.5 %

2.5 %

1.8 %

The Finnish
Economy

Global
Economy

Global
Tourism

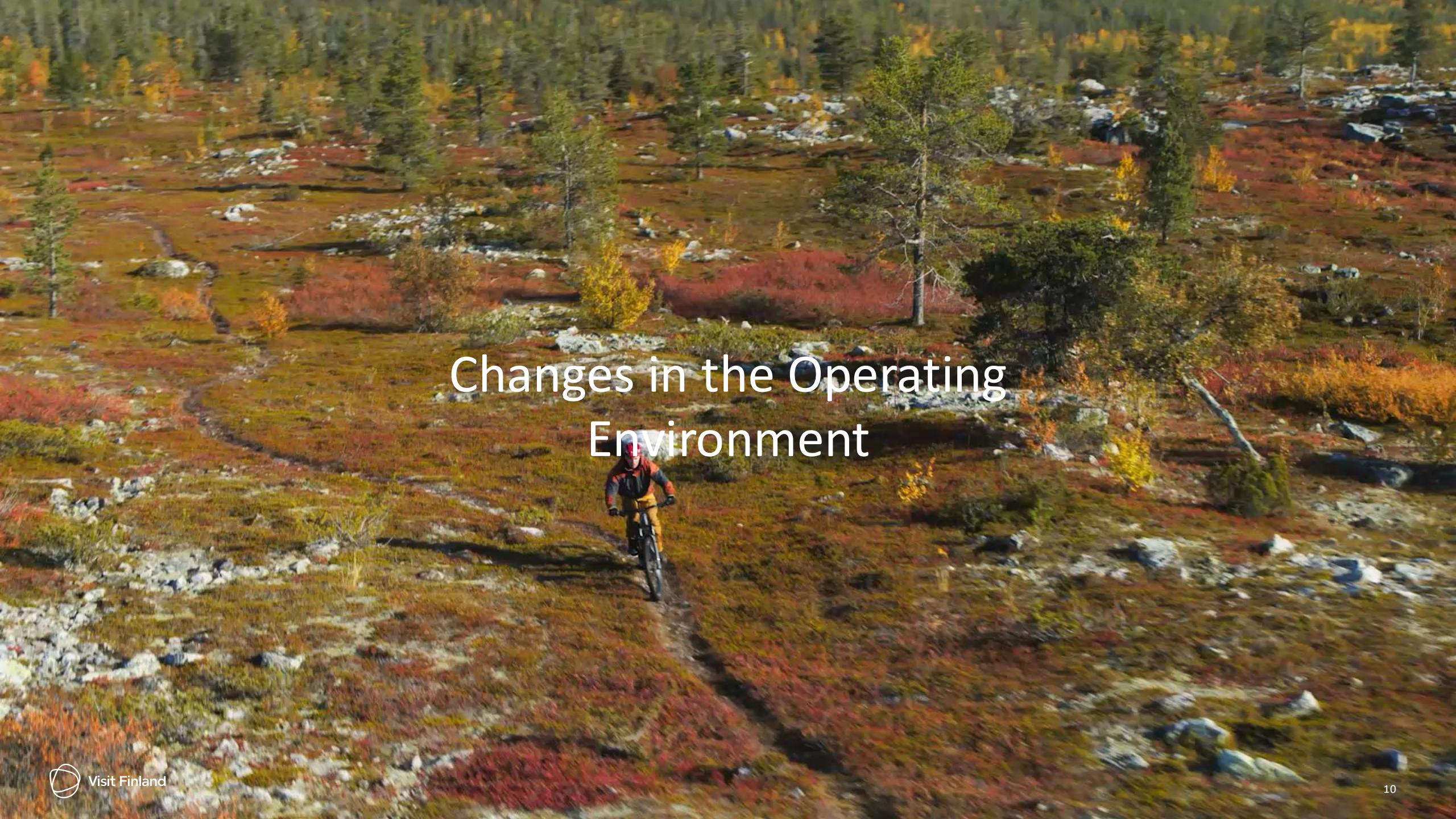
Finnish
Tourism

Average Annual Growth %

Bank of Finland, Growth Forecast for 2030s

WTTC Growth Forecast
2025-2035

MEAE,
Finland's Tourism Strategy
Growth Forecast 2024-2028

A wide-angle photograph of a person mountain biking through a vast, colorful landscape. The terrain is a mix of green, yellow, and red vegetation, likely a boreal forest in autumn. The person is wearing a red and black jacket and yellow pants, riding a mountain bike. The background shows a dense forest of tall evergreen trees and a rocky, uneven ground. The overall scene is vibrant and scenic.

Changes in the Operating Environment

The Operating Environment is Changing Faster than Ever - and it Creates Opportunities for Tourism

Geopolitical Uncertainty

Shifts in global power dynamics, perception of safety and travel willingness, along with ongoing economic uncertainty, are reshaping the tourism market.

Understanding which markets and target segments will drive future growth is becoming increasingly critical.

Climate Change and Sustainability

Will the demand for sustainable tourism continue to grow? How will climate change reshape tourism patterns and travel seasons across different countries?

Could these developments enable stronger growth and a competitive advantage for Finland in the future?

Technological Development

Digital accessibility and seamless purchase are critical success factors in tourism.

Finland's tourism offering suffers from weak digital visibility and accessibility in international markets.

In addition, the slow uptake of technological innovations limits the pace of the modernization of the industry's image and constrains future growth.

Changes in Consumer Behaviour

Consumers' growing influence and individual values are reshaping tourism demand.

Identifying and reaching the right target segments is becoming even more critical.

At the same time, the importance of a strong, coherent country brand and diverse, appealing tourism offering continues to grow.



Visit Finland's Purpose, Vision and
Mission

Our Role?

Visit Finland promotes the sustainable growth and international competitiveness of Finnish tourism.

Visit Finland is part of Business Finland, and its operations are funded through the state budget*.

Visit Finland builds Finland's global image as an attractive travel destination and supports international growth of tourism companies and business networks across the country.

In addition, Visit Finland plays a key role in implementing the National Tourism Strategy**, prepared under the leadership of the Ministry of Economic Affairs and Employment.

(*) The growth and development of inbound tourism to Finland has been assigned to Business Finland under the Business Finland Act (Act on the Innovation Funding Agency Business Finland and the limited liability company named Business Finland, 1146/2017). This task is carried out by Business Finland's Visit Finland unit.

(**) Sustainable Growth and Renewal in Finnish Tourism

Visit Finland's Purpose

Develop

Finland's tourism image and act as a platform for commercial country brand communication

Grow

awareness of Finland as a sustainable and attractive travel destination

Support

the development of Finland's tourism industry as a forerunner in sustainable tourism

Promote

sales and support the market entry of demand-driven product offerings to key sales and distribution channels

Produce and Analyse

data and support the use of data for the travel industry's needs

A scenic view of a forest under a blue sky with scattered clouds. The foreground shows the tops of several tall evergreen trees. The sky is a clear blue with wispy white clouds.

Vision

Tourism is a Strategic Pillar of Finland's Sustainable Growth by 2030

Tourism generates value for society, people and nature, and serves as a gateway to employment, trade and investment.

A scenic road through a forest with autumn foliage, leading to a body of water.

Mission

Visit Finland Empowers International Tourism to Become a Leading Driver of Sustainable National Growth

Through bold collaboration and shared ambition with the tourism industry, we will unlock Finland's full potential.

A photograph of a man fishing on a calm lake at sunset. He is standing in the water, wearing a dark jacket and a cap, holding a fishing rod. The background shows a forest silhouette and a colorful sky. The word "Objectives" is overlaid in large, white, sans-serif text.

Objectives



What Success Looks Like

Finland's awareness and attractiveness in key markets have strengthened.

Tourism is on a sustainable growth path towards €10 billion in annual export revenue.

Tourism is one of Finland's strategic pillars of sustainable growth, contributing over 3% of GDP and a 16% share of service exports.

Seasonality has evened out, and tourism has become a year-round industry across Finland.

The average length of stay has increased from 4 to 5 nights.

Finland's diverse and attractive tourism offering is widely accessible across key channels, and the range of services for both business and leisure travellers has expanded significantly.

Finland's tourism industry operates as a cohesive, growth-driven ecosystem. Clear roles and responsibilities enable effective collaboration, with actors complementing one another to drive impact.



Strategic Growth Drivers and Focus Areas

Together with the Tourism Industry, We Unlock Finland's Full Potential

Sustainable Growth – Together



Focus Areas

- ✓ A Bold and Distinctive Country Brand
- ✓ A Shared Vision for Growth and Clear Roles
- ✓ Accelerating Market Demand
- ✓ Unlocking Growth Potential and New Opportunities
- ✓ Smart Growth through Data

Sustainable Growth of Tourism

- In Finland, the growth strategy for tourism is a strategy for generating greater societal value.
- Growth is pursued responsibly and sustainably, ensuring that Finland's nature, cultural heritage and local communities continue to thrive and remain vibrant for future generations.
- Tourism growth is not measured by overnight stays alone, but by the value created. Our objective is to increase revenue per visitor across tourism businesses, accelerate the growth of international business across regions, and generate export revenues and tax income for the Finnish economy as a whole.
- Sustainability is at the core of Visit Finland's strategy. It is a crosscutting principle guiding everything we do, from creating international interest and demand to fostering a more unified, impactful and value-driven industry.
- Tourism must be a part of the solution, not only as an economic sector, but also as an advocate for nature and society.
- The development of low-carbon tourism is vital for the long-term future of the entire industry. Visit Finland has set out shared, sector-wide climate change mitigation objectives and outlined the actions required to achieve them in a dedicated Climate Action Plan. Finland is committed to international climate agreements in tourism, and Visit Finland coordinates their national implementation.
- Visit Finland also supports the development of domestic accessibility, as well as sustainable and seamless travel chains across the country.

A Unified and Impactful Industry

- Tourism should be recognised as part of the broader experience economy, strengthening its relevance and role within the national economy as a whole. One of the industry's key challenges is its fragmentation and the tendency of individual actors to prioritise their own interests. To become a truly growth-driven sector, Finland's tourism industry requires structural renewal and shared direction.
- From the visitor's perspective, different regions and destinations form a single, seamless experience. Delivering high-quality tourism experiences requires close collaboration across a fragmented value chain, bringing together a wide range of services and actors from both the private and public sectors.
- The credibility and growth of the tourism industry depend on a shared vision, a clear strategy, and strong cooperation across stakeholders. A fragmented value chain and limited resources highlight the need for clearly defined roles and a set of aligned actions that complement and reinforce one another. Rather than competing in silos, we must focus on joint efforts that enable the delivery of sustainable and meaningful experiences while generating economic, cultural and environmental benefits for local communities.
- A shared vision and unified direction are the keys to renewing the industry and unlocking its full potential.

Strategic Focus Areas

- Potential and interest in Finland as a travel destination have grown. However, turning this potential into actual demand requires both increased awareness of Finland and more impactful sales promotion in selected markets.
- We strengthen the role of sustainability in Finland's tourism image. Finland is a forerunner in sustainable tourism, and this position must be reflected consistently across all marketing and sales promotion activities. We actively support the development of year-round tourism and encourage longer visitor stays.

- Tourism growth in Finland is lagging other Nordic countries. Unlocking stronger growth calls for renewal, innovation and willingness to pursue new opportunities
- Tourism promotion in Finland is carried out with limited resources. A strong and unified tourism ecosystem strengthens the competitiveness of the entire sector and increases overall impact.

- ✓ A Bold and Distinctive Country Brand
- ✓ A Shared Growth Vision and Clear Roles
- ✓ Accelerating Market Demand
- ✓ Unlocking Growth Potential and New Opportunities
- ✓ Smart Growth through Data



✓ A Bold and Distinctive Country Brand

Finland's tourism identity is strong, and awareness and attractiveness are growing

ACTION POINTS

- ✓ Consistently strengthen Finland's awareness as a distinctive Nordic travel destination through unified brand communications and coordinated campaigns with the tourism industry.
- ✓ Clarify Finland's unique differentiators into clear, consistent messages and a multichannel presence in key markets.
- ✓ Position sustainability and year-round tourism at the core of marketing and brand communications.



✓ A Shared Growth Vision and Clear Roles

A unified, growth-oriented industry is working effectively together

ACTION POINTS

- ✓ Clarify and align the roles of Visit Finland, DMOs* and companies in tourism promotion and development.
- ✓ Define shared messages on the importance of tourism to Finland's prosperity and build a common narrative of Finland for international audiences.
- ✓ Build and strengthen strategic partnerships among the most impactful destinations and companies.

✓ Accelerating Market Demand

Tourism demand grows sustainably year-round

ACTION POINTS

- ✓ Clarify and scale Finland's flagship offerings for selected markets and segments, with a focus on extending the length of stay.
- ✓ Strengthen presence in target markets with growth-oriented partners and increase the availability of demand-driven offerings across key distribution channels.
- ✓ Increase awareness, attractiveness and demand for an off-season and year-round tourism offering.
- ✓ Improve accessibility by increasing the awareness, attractiveness and demand of tourism regions, and support the development of seamless domestic travel chains across Finland.

✓ Unlocking Growth Potential and New Opportunities

Finland's tourism potential has been fully unlocked

ACTION POINTS

- ✓ Focus on strategic, high-value themes where Finland has a competitive advantage or clear differentiation potential.
- ✓ Strengthen cross-sector collaboration with Business Finland and Team Finland partners to attract international conferences and corporate events to Finland.
- ✓ Leverage the appeal of the snow-free season through joint Nordic product development and marketing.
- ✓ Strengthen marketing collaboration with impactful brand partnerships and develop compelling, cross-sector content concepts.

✓ Smart Growth through Data

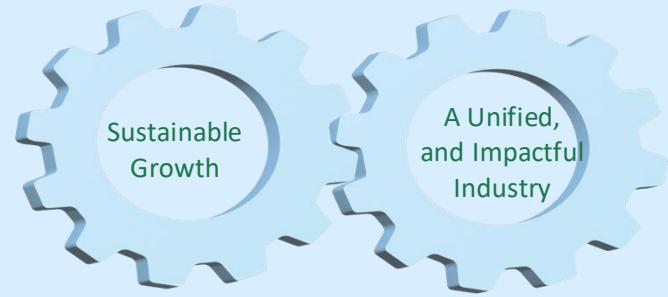
Growth is driven by high-quality data, insights and foresight.

ACTION POINTS

- ✓ Ensure easy access for the tourism industry to timely insights, data and digital platforms that enable collaboration and sustainable growth.
- ✓ Strengthen a culture of data-driven decision making and continuous improvement by developing and maintaining collaborative operating models with key partners.
- ✓ Strengthen the resilience of the tourism industry by enhancing its ability to identify and anticipate changes in the operating environment.

Tourism is a Strategic Pillar of Finland's Sustainable Growth by 2030

The tourism industry creates value for society, people and nature, and serves as a gateway to employment, trade and investment.



✓ BOLD AND DISTINCTIVE NATION BRAND

Finland's tourism identity is strong, and awareness and attractiveness are growing.

- Consistently strengthen Finland's awareness as a distinctive Nordic travel destination through unified brand communications and coordinated campaigns in collaboration with the tourism industry.
- Clarify Finland's unique differentiators in clear, consistent messages and enhance a multichannel presence in priority markets.
- Position sustainability and year-round tourism at the core of marketing and brand communications

✓ A SHARED VISION FOR GROWTH AND CLEAR ROLES

A unified, growth-oriented industry is working effectively together.

- Clarify and align the roles of Visit Finland, DMOs* and companies in tourism promotion and development.
- Define shared messages on the importance of tourism to Finland's prosperity and build a common narrative of Finland for international audiences.
- Build and strengthen strategic partnerships among the most impactful destinations and companies.

✓ ACCELERATING MARKET DEMAND

Tourism demand grows sustainably year-round.

- Clarify and scale Finland's signature/flagship/core offerings for selected markets and segments, with a focus on extending the length of stay.
- Strengthen presence in target markets with growth-oriented partners and increase the availability of demand-driven offerings across key distribution channels.
- Increase awareness, attractiveness and demand for an off-season and year-round tourism offering
- Improve accessibility by increasing the awareness, attractiveness and demand of tourism regions, and support the development of seamless domestic travel chains across Finland.

✓ UNLOCKING GROWTH POTENTIAL AND NEW OPPORTUNITIES

Finland's tourism potential has been fully unlocked.

- Focus on strategic, high-value themes where Finland has a competitive advantage or clear differentiation potential.
- Strengthen presence in target markets with growth-oriented partners and increase the availability of demand-driven offerings across key distribution channels.
- Leverage the appeal of the snow-free season through joint Nordic product development and marketing.
- Strengthen marketing collaboration with impactful brand partnerships and develop compelling, cross-sector content concepts.

✓ SMART GROWTH THROUGH DATA

Growth is driven by high-quality data, insights and foresight.

- Ensure easy access for the tourism industry to timely insights, data and digital platforms that enable collaboration and sustainable growth.
- Strengthen a culture of data-driven decision-making and continuous improvement by developing and maintaining collaborative operating models with key partners.
- Strengthen the resilience of the tourism industry by enhancing its ability to identify and anticipate changes in the operating environment.

The Meaning behind the Words

A PILLAR OF SUSTAINABLE GROWTH

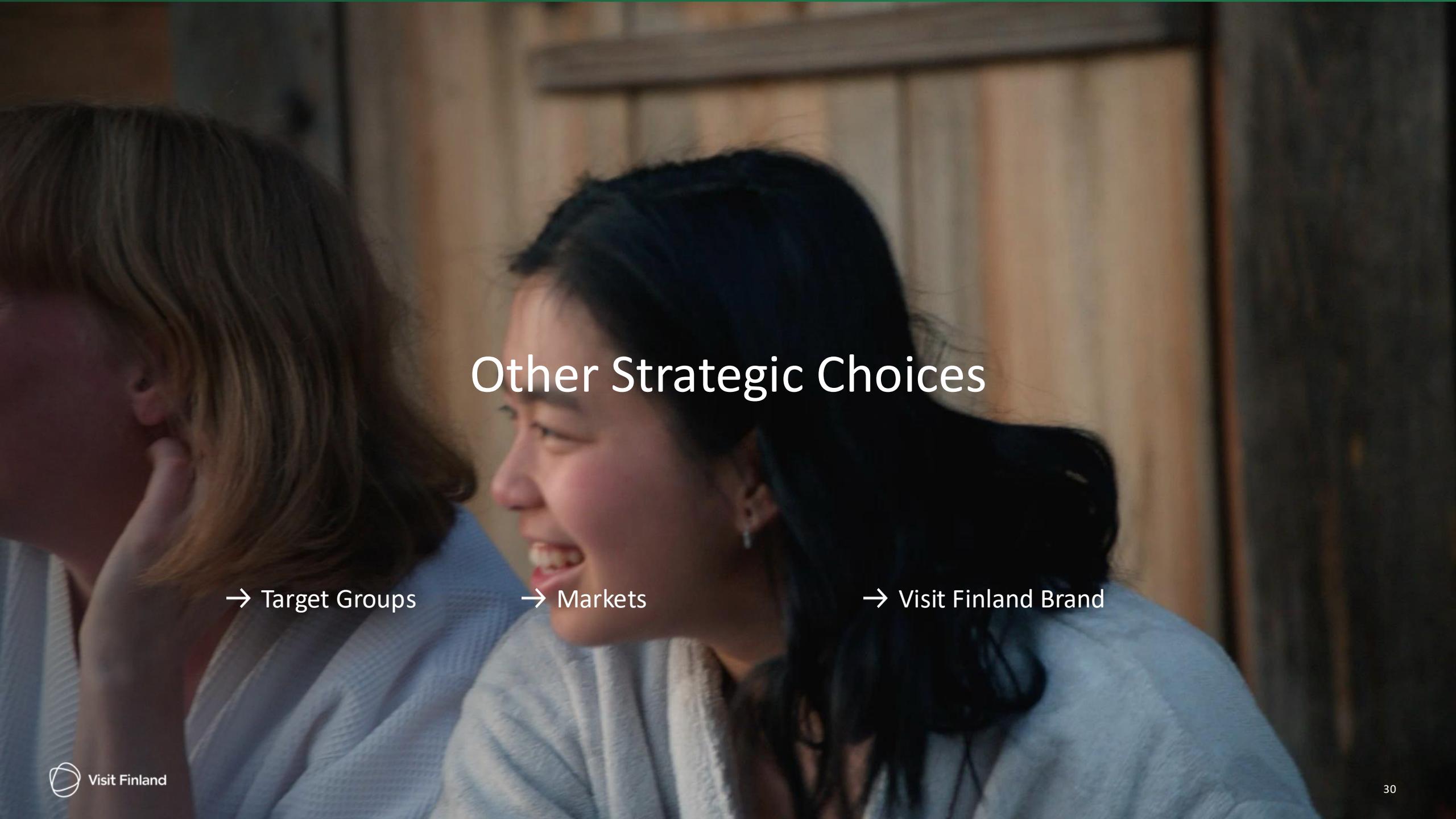
- Finland's tourism growth strategy is a sustainable growth strategy. Growth is pursued responsibly and sustainably, ensuring that Finland's nature, cultural heritage and local communities can thrive for future generations.
- The Sustainable Travel Finland programme guides companies and destinations in adopting a comprehensive approach to sustainability across their operations, development and management.
- The strategy aims to support year-round tourism growth across Finland and extend the average length of stay.
- Engage audiences for whom sustainability and responsible travel are key values.

THE TOURISM INDUSTRY CREATES VALUE FOR SOCIETY, PEOPLE AND NATURE, AND ACTS AS A GATEWAY TO EMPLOYMENT, TRADE AND INVESTMENT

- Finland is a country where tourism creates value for people, nature and society. In practical terms, this means strengthening regional vitality, nature capital and social inclusion.
- The industry also has significant multiplier effects across other sectors. In 2019, each euro spent on tourism generated an average of 61 cents for other industries (OECD average).

BOLD COLLABORATION AND SHARED AMBITION

- We work with companies that have a genuine ambition and the capability to grow internationally.
- Boldness means daring to stand out and do things differently. We focus on a flagship offering and build on Finland's strengths – aligning our efforts and elevating our impact together through shared ambition.

A photograph of two women laughing together. One woman is in the foreground, smiling broadly, while the other is partially visible behind her. They are both wearing light-colored shirts.

Other Strategic Choices

→ Target Groups

→ Markets

→ Visit Finland Brand

Consumer Target Groups

Primary segments



Nature Lover

These travellers appreciate Finland's unique nature and seek experiences such as national parks, hiking, berry picking and mushroom foraging.



Lifestyle Traveller

Interested in the Finnish way of life, saunas, cottages, and home-cooked food. They seek holistic wellness experiences and local culture.



Culture Traveller

Interested in Finnish lifestyle, saunas, local food, and cultural events. They value authentic experiences and local culture.



Outdoor Explorer

Activity-focused travellers who value nature and want to experience it as closely as possible. Interested in e.g. cycling and hiking in national parks.

Secondary segments



City Life Enthusiast

These travellers look for urban culture, nightlife, cafes, gourmet restaurants and festivals. They are also interested in museums, galleries and historical sites.



Active Hobbyist

They value outdoor and sporting activities such as hiking, canoeing, winter sports and other traditional activities. They also participate in local food festivals and sporting events.

Other



Wellbeing Seeker

Enjoys relaxation, tranquillity and personal care.



Group Traveller

Travels in groups and takes part in city tours.



Foodie

Seeks culinary experiences.



LGBTQ+

Seeks local LGBTQ+ culture and communities.

“Travel isn't just about discovering new places, it's about discovering a new perspective. It's about immersing yourself in the local culture and lifestyle and gaining a deeper understanding of the world around you.”

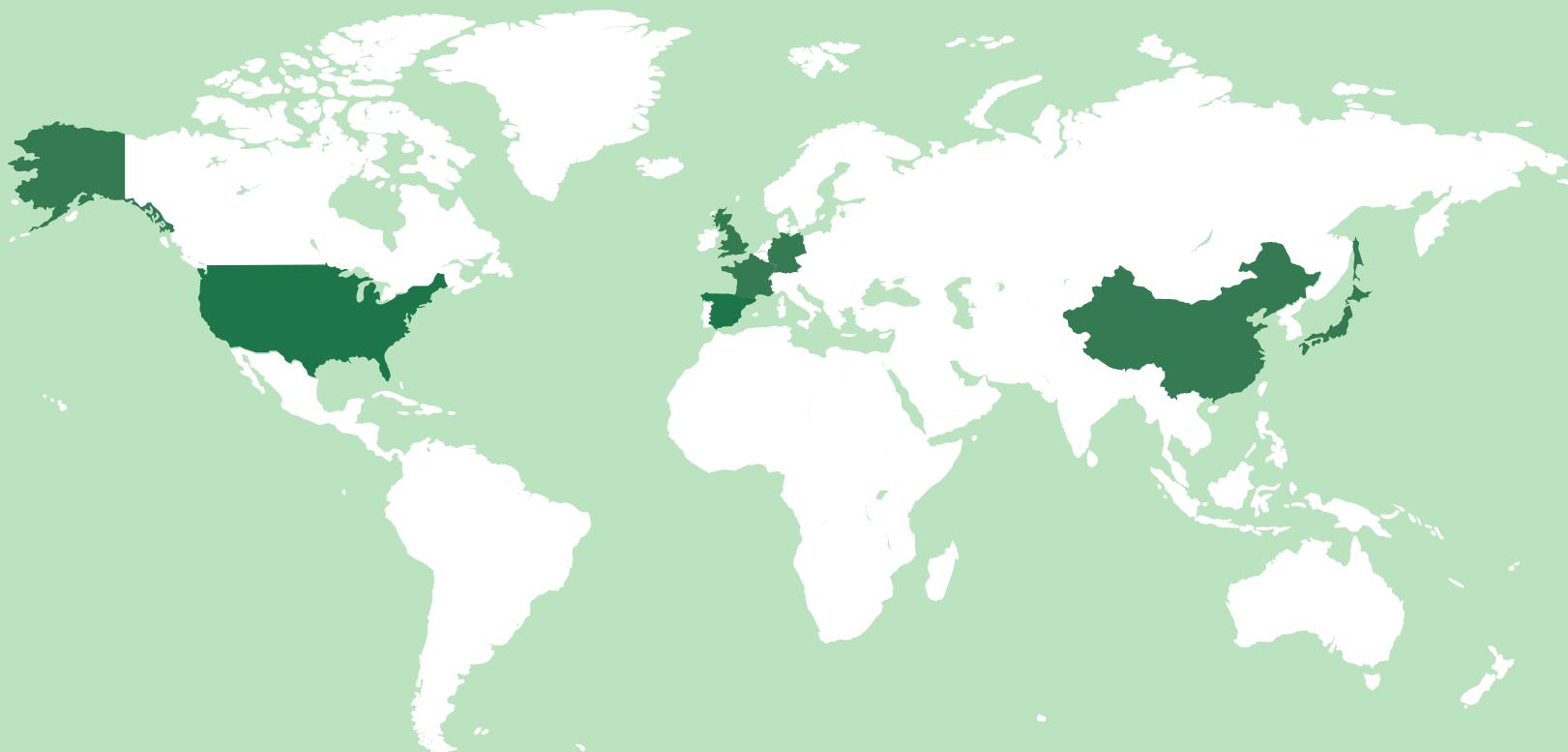
-Lifestyle Traveller



Visit Finland

Visit Finland target markets 2026*

Germany, UK, France, Spain, USA, China and Japan

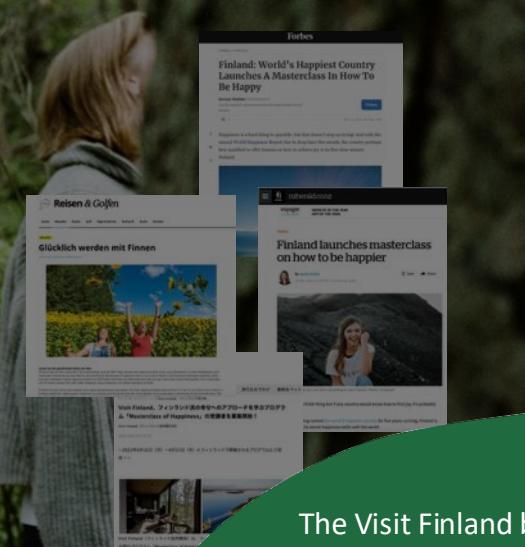


Factors influencing Visit Finland's Market Selection:

- **Travel volume to Finland:** number of overnight stays, spending, Finland's market share
- **Expected growth potential:** demand development, accessibility, expected effectiveness of marketing and sales activities
- **Existing cooperation networks:** market relevance to the Finnish travel industry, Finland's image, existing networks and partnerships
- **Sustainability factors:** traveller profile, seasonality versus year-round travel potential, and our aim for a balanced market portfolio

* Project-based targeted activities in other markets

**FIND
YOUR INNER
Finn**
MASTER IN HAPPINESS



The **MASTERCLASS of HAPPINESS**

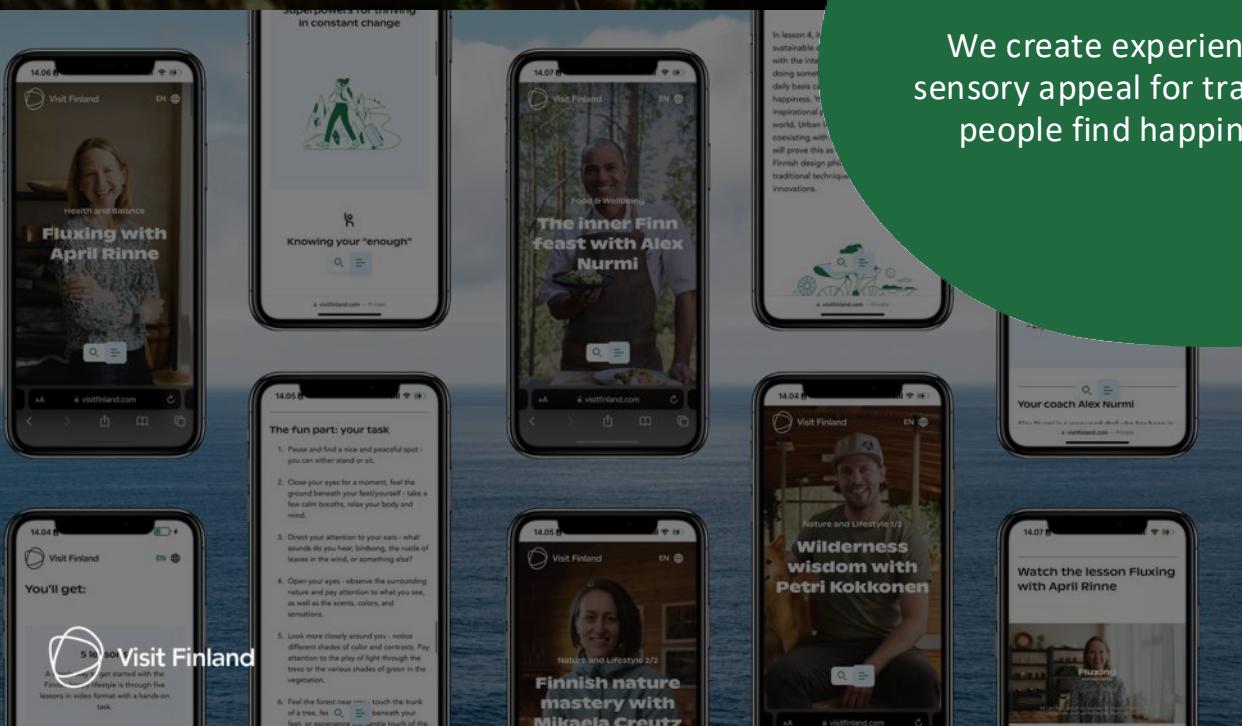


"I went to Finland
to find out how
to be happy"



Brand core

We create experiences with emotional and sensory appeal for travellers. This way, we help people find happiness and balance in life.



Welcome to Helsinki –
where happiness resides.



Operational Arenas



Operational Arenas



Tourism Growth Arena

The success of tourism is built on three mutually reinforcing areas: **demand, availability and accessibility**. Together, these elements form the foundation for growth. Success requires that all three work in alignment – if one is missing or underperforms, growth will stall. Even the strongest brand is not sufficient if there is no demand for the offering, or if potential visitors are unaware of it.

Visit Finland works to strengthen all three arenas. However, sustainable and long-lasting growth can only be achieved through **close collaboration** across the tourism industry.



Limits of Sustainable Tourism

Tourism Decline

- Motivation and resources for preserving culture decline
- Expansion of industries that cause greater harm
- Regional decline and stagnation intensify
- Retention and appeal are decreasing
- Service provision declines and employment opportunities are shrinking



Unsustainable Tourism Growth

- The built cultural environment is neglected or falls under tourism construction
- Nature is eroding and biodiversity is deteriorating
- Local culture is being erased, and the destination is becoming homogenised
- Pollution and emissions are increasing
- Skills shortage and degradation of reputation
- Economic benefits are unevenly distributed and leak outside the local economy
- Services are developed and designed only for travellers
- The sense of insecurity is growing, peaceful living, services and recreation are being disrupted
- Infrastructure development and maintenance costs increase
- Infrastructure capacity is exceeded and cannot sustain operating pressure