

02/26

**COUNTRY
SKILLS
PROFILE
REPORT**



FINLAND



Co-funded by the
Erasmus+ Programme
of the European Union

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EXECUTIVE SUMMARY

Digitalisation and green transition change tourism occupations. Specialists concentrating on smart solutions, tools, and platforms, as well as digital content creation, are required desperately. In addition, basic tasks in the sector, such as working as a receptionist, require much more digital skills than before. The most needed digital skills in the tourism sector in the future are related to digital and data security and online marketing and communication.

Digitalisation and green transition change tourism occupations.

The sector is also moving into a greener direction, which means that environmental management will be the key content in the emerging occupational profiles. In addition, green skills in Finland include resource-efficiency and applying the principles of circular economy, carbon management to reduce CO₂ emissions, sustainable product and service design, and sustainability communication.

The biggest skills gaps are in carbon management as well as in sustainability communication.

Social and cultural skills are highly necessary as tourism is “a people’s business”. Providing excellent customer service is the most necessary skill in the future. More skills are needed to communicate effectively, not only with a diversity of guests, but also within the workplace. Taking care of the persons working for the company in the same way as taking care of the customers is the key issue. In addition, as tourism is about cooperation with various stakeholders, cooperation and networking skills are deemed essential.

Collaboration is also the main issue in the best practices related to upskilling, reskilling, attracting, and retaining staff in the tourism sector in Finland. The national and regional public authorities, public education and training institutions, and the tourism industry collaborate in employment and skills development. When the volume of tourism is moderate and the sector consists of micro-size companies, coordinated training and networks of freelancers providing their expertise is a must.

This original research and report was conducted in early 2024. An update was done during 2025 and published in early 2026.

INTRODUCTION

The Erasmus+ PANTOUR Project is a European partnership for improving a collaborative and productive relationship between education and industry. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance; 2018-2022). The PANTOUR project aims specifically at designing innovative solutions to address skills needs in tourism.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, sector associations and policy makers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To be able to achieve this goal, research has been conducted in every country of the project consortium, to investigate the future of tourism, skills gaps between current levels of skills in the tourism industry and the future skills needed in the future.

As a start, up to date information is needed. This will be covered with this Country Skills Profile Report: a comprehensive document, covering one country that provides an in-depth analysis of the general tourism and skills landscape, gaps, needs and workforce capabilities within a particular country. It serves as a valuable resource for policymakers, government officials, employers/employees, and educational institutions to understand the current state of skills and make informed decisions regarding workforce development strategies.

The purpose of this Country Skills Profile Report is to provide on the basis a comprehensive overview of the following:

General information of each country in the PANTOUR consortium regarding tourism and tourism employment, i.e., tourism facts & figures;

Summary of the current situation regarding the delivery of Digital, Green and Social Skills training provision for the main types of suppliers of education/training.

The original publication from 2024 consists of an online survey and results within each country in the PANTOUR consortium, held among tourism professionals, HR managers and decision makers as well as an inventory of Best Practices The document can be found in the PANTOUR publications.

The publication at hand, consists of updated information as well as results from a focus group discussion held in late 2025 for tourism professionals offering an overview of contemporary developments in tourism, trends in tourism employability, and the existing gaps between current levels of skills in the tourism industry and the projected future skills needed towards 2030.

1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF FINLAND

The primary aim of this chapter of this Country Skills Profile report is to elaborate on general information and give a summary of the tourism situation in the country. This is conducted by collecting and analysing data from country sources and summarising these. The analysis is built upon existing online sources, course content, reports, existing research results, articles, books.

1.1 TOURISM FACTS & FIGURES

Tourism globally

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the international statistics portal Statista (2023 [1]), the total contribution of travel and tourism to the global economy was \$ 7.71 trillion in 2022 (Statista, 2022), a 7.6% share of the total global GDP, remaining 5% below pre-pandemic levels. In 2024, the total contribution of travel and tourism to the global economy has risen to over \$ 10 trillion.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

The same source (Statista, 2023 [2]) reports that the number of international tourist arrivals worldwide was 1,4 billion in 2024 (963 million in 2022).

According to another study of Statista (2023), global employment in the travel and tourism sector rose slightly in 2022 over the previous year, following a sharp drop with the onset of the coronavirus pandemic. After the pandemic, the number of travel and tourism jobs worldwide has risen to 357 million (295 million in 2022 and 320 million in 2023).

1.1.1 Contribution of travel & tourism to GDP in Finland

In 2019, tourism exports accounted for more than 17% of the export income generated by services in Finland. Tourism export share was 5.3. billion EUR and it has doubled since the year 2000. The total demand for tourism was approximately EUR 16 billion, and its direct share of GDP was 2.7%. In 2017-19, international tourism demand increased faster than other sectors at an annual rate of approximately 8%. It should be noted that the share of GDP from tourism differs heavily between the regions in Finland. For example, in Åland, it was 19.7%, and in Lapland, it was 6.9% of GDP (Ministry of Economic Affairs and Employment of Finland, 2021; Ministry of Economic Affairs and Employment of Finland, 2022a).

In 2024, tourism demand in Finland recovered to roughly the 2019 level: total tourism spending was estimated at €16.6 billion, broadly similar to the pre-pandemic €16.5 billion in 2019.

Before the COVID-19 pandemic, between the years 2015–2018, tourism's direct share of GDP was growing from 2.5% to 2.7%. In 2020, this share dropped to 1.7% due to the pandemic, and the total demand for tourism was 9.7 billion EUR. In 2024, tourism's contribution to Finland's GDP was estimated around 2.4 %, close to pre-pandemic levels (Visit Finland).

1.1.2 Incoming and outgoing tourists

Distribution of tourism receipts in 2019 was as follows: Russia 19%, Sweden 11%, China 8%, Estonia 7%, Germany 7%, USA 5%, and UK 5 %. Furthermore, distribution of registered foreign overnight stays was as follows: Russia 12%, Germany 9%, UK 8%, Sweden 8%, China 6%, France 5%, USA 4%, and the Netherlands 4% (Visit Finland, 2020b). Due to the Ukrainian war, the focus markets have changed and the priority markets in 2022 are German, UK, and Swedish markets. During 1.1.-31.12.2022 the primary source markets of registered foreign overnight stays were the United Kingdom, Sweden, France, United States, Netherlands, Estonia, Spain, and Italy (Visit Finland 2023b). In practice, the biggest change in the foreign overnight stays is the lack of Russian and Asian tourists.

In 2024, foreign visitors to Finland spent an estimated €3.7 billion, based on combined Visit Finland and Statistics Finland Border Survey data, with approximately 4.9 million trips by international tourists.

Latest Visit Finland statistics show that for the January–July 2025 period, the *leading source markets* for registered foreign overnight stays were Germany (largest source market), Sweden, France, United Kingdom, United States and the Netherlands.

Across the summer peak season of 2025 (June–August), foreign overnight stays in Finland totalled around 2.1 million, up about 12 % year-on-year, with Germany, the USA and the UK among the strongest sources, though Asian markets (e.g., China, Japan) remain significantly below 2019 levels.

Finns made 10.4 million trips abroad in 2019. The most popular destinations were Sweden 2.14 million trips (20%), Estonia 2.03 million trips (19.5%), Spain 790,000 trips (8%), Germany 610,000 trips (6%), Russia 470,000 trips (4.5%), Italy 350,000 trips (3%), UK 320,000 trips (3%), Norway 310,000 trips (3%), and Greece 260,000 trips (2.5%). In 2022, Finns made 6.2 million trips abroad. The most popular destinations were Estonia 1.55 million trips (25%), Sweden 1.3 million trips (21%), Spain 600,000 trips (9.7%), Greece 310,000 trips (5%), and Germany 290,000 trips (4.7%) (Official Statistics of Finland, 2023).

Trend data for outbound departures suggest Finland residents' international trips have been increasing since the pandemic — with estimates indicating around 8.36 million outbound tourism departures in 2024, up from lower pandemic years and moving back toward pre-pandemic levels. (*UNWTO / StatBase estimate*).

Typical to previous years, official Finnish statistics for outbound tourism in 2024 still list Sweden, Estonia, Spain, Germany, Greece, and the UK as leading destinations for Finns' trips abroad, reflecting continuity in travel preferences.

1.1.3 Share of different transportation modes (plane, car, train) in tourism

In Finland, the latest (2024) figures show that if the distance of travelling in Finland is 100-200 kilometres, almost 75% of travel is made by car, 15% by train, and 6% by bus. If the distance is more than 200 kilometres, approximately 70% of travels are made by car, 8% by train, 7% by bus, and 12% by other means (i.e., plane, ferry). Passenger car journeys are longer than before, and public transport journeys are shorter. The number of public transport trips has not changed, but the number of kilometres travelled by public transport has decreased. The use of public transport has been more clearly focused on urban areas (Finnish Transport and Communications Agency Traficom, 2023; Finnish Transport Infrastructure Agency, 2023).

1.1.4 Arrivals of international versus national tourists

Domestic tourism plays a key role in Finland's tourism. Domestic demand accounts for around 70% of the total demand for tourism (Ministry of Economic Affairs and Employment of Finland, 2021). In 2019, there were 23.1 million overnight stays at Finnish accommodation establishments, of which 69% were domestic stays and 31% were foreign overnight stays (Ministry of Economic Affairs and Employment of Finland, 2021). However, the growth rate in foreign overnight stays was faster in Finland than on average in Europe before the COVID-19 pandemic. In March 2023, the share of domestic overnight stays was 74% and international stays 26% in Finland (Visit Finland, 2023b).

In 2024, domestic tourism continues to be a major component of Finland's tourism market. According to national tourism accounting figures, domestic tourism expenditure represented an estimated ~€11.96 billion, while foreign tourism expenditure was about €4.7 billion — meaning domestic demand accounted for approximately 72 % of total tourism demand and foreign demand about 28 %.

1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

In 2019 the tourism sectors employed about 154,000 persons, which was about 5.8 % of all employed persons in Finland. In addition, temporary agency work is commonly used, which equals to 10,000 estimated number of full-time equivalents (FTE). In total, FTE in tourism employment in Finland is 120,000. This means that in the accommodation and catering sector about 40% of the employees worked part time and temporary agency workers accounted for about 6% of the employees in these sectors (Ministry of Economic Affairs and Employment of Finland, 2022b). The tourism sectors are female-dominated and major employers of women in Finland. Indeed, the labour force in these sectors includes more female workers (71% in Finland) than male workers (2022b). This means that these sectors also have more women entrepreneurs and managers than many other sectors.

In Finland, almost half (46%) of the FTEs were generated on the food & beverage sector employing 54,646 persons, and one third (34%) in the passenger transport services employing 39,658 persons. Travel agency and tour operator services incl. the programme service sector generated 11% of the FTEs and accommodation sector almost 10% of the FTEs (Ministry of Economic Affairs and Employment of Finland, 2022b).

The Covid-19 pandemic worsened the shortage of labour. The number of employees decreased by over 25,000 persons (-16 %) to 128,700 persons in 2020 (Ministry of Economic Affairs and Employment of Finland, 2022b).

Tourism employment has been recovering since the pandemic but remains reshaped by structural changes in 2024. In 2023, approximately 146,600 people were employed in tourism-related activities in Finland (around 5.3 % of total employment). This is close to pre-pandemic levels but slightly below the 2019 figure of about 154,000 jobs (5.8 % of total employment) used in older reports.

The OECD's 2024 tourism trends report similarly estimated that tourism directly provided about 119,600 full-time equivalent jobs in 2022 (~5.1 % of total employment), compared with around 133,200 in 2019 (~5.8 %).

Thus, in 2024 in Finland, while employment numbers have recovered significantly after the pandemic, some measures (especially full-time equivalents and job quality indicators) still lag pre-COVID levels.

1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME

The aim is for Finland's tourism sector to grow significantly until 2028. The key objective is to double tourism exports. Tourism direct value added as a share of GDP (%) is estimated to grow to 3.0% until 2032. The general objective is to reduce the gap between the domestic and inbound travel accounts. The international target market is expected to grow at an annual rate of around 4% in overnight stays and around 5 % in tourism exports (Ministry of Economic Affairs and Employment of Finland, 2022a).

In Finland, tourism income can be increased by producing high-margin value-added services for domestic and international tourists. Growth is also expected to occur because of innovation at the interface between tourism and other sectors (e.g., sports and wellness services, food industry and ICT).

1.4 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

The national strategy for tourism (Ministry of Economic Affairs and Employment of Finland, 2022a) envisions Finland as the world's leading sustainable travel destination. 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.

Finland's country image as a safe and stable country provides a solid foundation for the development and growth of the tourism sector after the pandemic. The recovery is supported by responding to the digital transformation, making use of innovations, improving access, investing in the development of sustainable and responsible tourism, and strengthening the competitiveness of the sector's business environment.

Nature is the biggest attractive factor in Finnish tourism, alongside the local style of living and experiencing the Finnish culture. The most important segment of this niche-tourism destination is a so-called Modern Humanist. Modern Humanists are considered experienced travellers who prefer locality over mass tourism and are interested in experiencing nature (Visit Finland, 2020a). This type of person likes to explore and go on adventures on their own terms. The characteristics of this group are higher than average education and income levels and interest towards sustainability, new cultures and local people. Accordingly, the core segments of the Finnish travel markets are Nature Wonder Hunters seeking unique nature experiences, Nature Explorers looking for peaceful nature to unwind, and Activity Enthusiasts enjoying an active holiday in nature.

Indeed, the sustainability of tourism is a basic requirement in Finland. Since sustainability is in the core of all tourism development activities, Visit Finland has launched the Sustainable Travel Finland programme for tourism companies and destinations. The programme and its criteria relate to Sustainable Development Goals and sustainable tourism indicators, but it has been applied to the Finnish context.

The national tourism strategy identifies responding to digital change as one of its key priorities. Therefore, Finland is developed as a smart tourism destination (Visit Finland, 2019; 2020a). In particular, digitalisation of its tourism sector is promoted to increase the discoverability, findability, buyability and experientiality of tourism services. Tourism is developed by leading with knowledge, enhancing digital accessibility as well as the development is supported by digital platforms.

During the pandemic, the relative importance of domestic tourism in the total demand for tourism has increased (Ministry of Economic Affairs and Employment of Finland, 2021). Various rural, nature-based destinations were the biggest winners. In particular, the Finnish coast and archipelago hit records in tourist arrivals and there was a significant growth in the number of visitors. However, turnover of tourism companies has decreased even if the number of customers/tourists increased. This is connected to the change in segments. Individual, domestic leisure tourists cannot generate the same turnover as business and group travel or international tourists before the pandemic. Therefore, the Finnish Government launched a Growth Programme to support the sustainable growth of domestic tourism with additional funding to seize its opportunities.

Indeed, due to the pandemic, many tourism companies developed their business operations. Pandemic was seen as a chance to renovate and clean properties, review and analyse different business operations in-depth, digitalise operations and increase skills in online marketing, rationalise the cost structure, develop new products and services, and revise and renew the business concept. Simultaneously, sustainable development has gained more attention as a competitive advantage for tourism companies due to the national Sustainable Tourism Finland Programme by Visit Finland. Companies also highlighted that pandemic has increased the level of cooperation between tourism stakeholders to respond jointly to the challenges. In sum, the COVID-19 pandemic has contributed to the skills development, especially to the development of digital and green skills.

1.5 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

Russia's invasion of Ukraine significantly weakened the operating conditions of the sector. The biggest effects for Finland are related to the stoppage of Russian tourism and the weakening of accessibility from Asia due to Russia's overflight ban. Before the pandemic, the Russian and Asian markets covered a total of almost a third of Finland's international tourism income, and their absence reduces this by at least one billion euros annually. The decline in Russian and Asian tourism also weakens Finland's competitive position in relation to the other Nordic countries, as this market is relatively more significant for Finland. New growth is sought in, for example, the United States and by strengthening its position in the European market.

Other challenges in Finland relate to company structure, which is dominated by micro-companies, and larger companies leading tourism development are mostly missing. These companies' skills in strategic business planning should be strengthened to ensure viable business operations. The tourism business is also very seasonal, and product development differs extensively among regions. Digitalisation is exploited at the company level, but it is not utilised holistically in the service/product chain. This makes it difficult for tourists to purchase travel packages. In addition, climate change has a significant impact as it is difficult to predict the winter season and its activities – if there is a lack of snow and ice. ‘

The future opportunities relate to developing original, intriguing, safe, high-quality, year-round tourism products and services for the chosen and specific target segments (e.g., educational tourism, wellness tourism) that are easy to buy. In product development, service design and storytelling, as well as multisectoral collaboration, should be used as tools.

A lot has already been done in Finland for sustainability, and this should be utilised as Finland's tourism competitive asset and supported by continuous quality development with the customer and the development of the safety, security and accessibility of tourism services. Understanding digitalisation and competence development are also essential components

of the digital reform of the tourism sector. Digital buyability, i.e., the possibility to book online, findability and discoverability of tourism services, and the use of digital solutions in tourism products and services, must be developed.

2. CURRENT SKILLS TRAINING DELIVERY IN FINLAND

In this section, you will find an overview of the training delivery of digital, green, and social skills sets in Finland. In Finland, vocational and higher education is state-funded and free of charge for the Finnish students and students from the EU. Therefore, tourism education and training providers are usually public entities: vocational colleges and universities of applied sciences (table 1). They offer various vocational qualifications, degrees, and diplomas. It is important to note that training for the tourism sector is not usually provided by private educational institutions or training companies. As the size of the tourism companies is small, only the biggest hotel and restaurant chains (e.g., S Group, Scandic Hotels Group AB) organise their own training for their staff professional development. Instead, the public entities provide adult learners qualifications, degrees, and diplomas where learning is strongly integrated in the daily work life and tasks in the workplace.

In Finland, vocational education and training (VET) is designed both for young people without upper secondary qualifications and for adults already in work life. Vocational qualifications can be completed in school-based VET or as competence-based qualifications. The qualifications structure in vocational education and training (VET) has three levels: vocational upper secondary qualification, further vocational qualification, and specialist vocational qualification. Upper secondary qualifications are intended for those who are new to the field, while further and specialist vocational qualifications are aimed at those who already have acquired the basic skills but who are looking to progress in their career. The main idea is that individual learning pathways are designed to help students gain an occupation or progress in their careers (Ministry of Education and Culture, 2023a). This qualification structure responds to people's lifelong need to develop their professional skills, which means that tourism sector employees study further and specialist qualifications and integrate learning and working.

Table 1. Tourism, hospitality and restaurant education and training providers

EQF level 4, vocational upper secondary qualification	EQF level 6, bachelor's degree	EQF level 7, master's degree
AhlmanEdu	<i>Universities of Applied Sciences</i>	<i>Universities of Applied Sciences</i>
Lappia Vocational College	Haaga-Helia UAS	Haaga-Helia UAS
SamiEdu Vocational College	Högskolan på Åland	Jyväskylä UAS
Tavastia Vocational College	Jyväskylä UAS	Kajaani UAS
Careeria	Kajaani UAS	Laurea UAS
Ekami	Karelia UAS	Savonia UAS
Gradia	LAB UAS	Seinäjoki UAS
Hyria	Lapland UAS	Tampere UAS
Kainuu Vocational College	Laurea UAS	
Keuda	Satakunta UAS	<i>Universities</i>
Kiipula Special Education Vocational College	Savonia UAS	University of Lapland
JEDU Vocational Education Centre	Seinäjoki UAS	University of Eastern Finland
Salpaus Further Education	Tampere UAS	
Lapland Education Centre REDU	XAMK UAS	
Luksia		
SASKY	<i>Universities</i>	
Omnia	University of Lapland	
OSAO		
Perho Culinary, Tourism & Business College		
Raseko		
Riveria		
The Sámi Education Institute		
Saimaa Vocational College		
Salo Vocational College		
Savo Vocational College		

Sedu		
Helsinki Vocational College and Adult Institute		
Tampere Vocational College Tredu		
Turku Vocational Institute		
VAMIA		
Vantaa Vocational College Varia		
WinNova		

In addition, a total of 22 universities of applied sciences operates as public limited companies. Universities of applied sciences are mainly regional higher education institutions whose activities highlight their connection to working life and regional development. They provide education for professional expert tasks that are based on the requirements of working life. Universities of applied sciences provide bachelor's and master's degrees. Bachelor's degrees are mainly targeted to young people without higher education and master's degrees are targeted to adults who have already gained work experience and want to progress in their career. Both degrees are also offered for adults and can be studied while working with the blended learning model (Ministry of Education and Culture, 2023b).

In addition, tourism authorities are very active in skills development. As the tourism sector is dominated by micro and small-size companies, it is essential to increase their skills to ensure profitability and competitiveness. For this reason, the national tourism board, Visit Finland, is the main training provider in Finland and it has introduced its Visit Finland Academy. The Visit Finland Academy, established in 2016, offers a training path consisting of intensive group training days (Visit Finland, 2023c). It is a training selection aimed at tourism destinations and companies. As the Academy serves micro and small-size companies' interests, the training is very practical and includes many real-life examples.

The Academy ensures that the tourism sector in Finland has up-to-date knowledge and skills about the relevant topics to increase Finland's competitiveness as a tourism destination and that tourism development is coherent in Finland. The training is booked and paid for by Visit Finland's partners, such as regional tourism organisations, regional tourism projects or other regional development agencies that are responsible for tourism development in

their region. Therefore, this is a network approach working through the network of different actors responsible for regional tourism development in collaboration with Visit Finland.

2.1 DIGITAL SKILLS

First, it can be concluded that the main skill sets provided by the training organisers relate to online marketing and sales. For example, when reviewing the training contents of the Visit Finland Academy, they mainly focus on marketing communication, search engine optimisation, social media marketing, distribution and sales channels. Also, in tourism degree programmes social media marketing is highlighted: Facebook and Instagram marketing, community building as well as search engine optimisation. In addition, new technology trends e.g., AI and gamification are emphasised in many training contents. Big data and data analytics are also emerging topics in training offering.

Regarding the skills needed, it can be stated that it is crucial to understand the significance and opportunities of the digital world and digital transformation in tourism business and service development. Thus, skills in developing digital services in a customer-oriented way are vital. Customer orientation means that these services provide tourists with means to access and purchase tourism products and services, and get and share information as well as experiences. These services should be tailored, customised and automated.

Therefore, it is necessary to be able to identify new technology trends and their role in developing innovative experiences and creating a competitive advantage for the business. These technologies include for example artificial intelligence (AI) and machine learning, virtual reality (VR), augmented reality (AR), Internet of Things (IoT), robotics, and gamification, which create many new opportunities for the development of tourism services and for understanding and analysing tourists with the help of the data obtained. Increasing the skills required to use these digital solutions in tourism product and service development is required. In addition, understanding the evolving role of mobile technology and identifying its potential in value creation and grasping business opportunities is needed.

Big data and business intelligence have become a significant factor in competitiveness and productivity in the tourism sector. Big data i.e., large data sets that exist within companies as well as business intelligence referring to the utilisation of this data for analytical purposes to make more informed business decisions are essential skill sets. The key skills are related to the development and utilisation of the related tools, so that decisions that guide the business are made based on data. In sum, tourism companies should be able to recognise the importance of business intelligence/data in the development of services and business, as well as collect, analyse, and utilise data.

The positive impact of the sector on regional well-being and employment requires an increase in the sales of tourism services offered in Finland. More effective sales of tourism services is possible by investing in the digital discoverability of Finnish tourism services and making them easier to purchase. Therefore, skills are needed to develop online purchasing/sales of travel services and to utilise the opportunities of the platform economy. In addition, the expertise of tourism companies in the selection and utilisation of digital distribution channels should be increased. Thus, the following themes in digital skills should be emphasised to increase sales: the digital footprint/discoverability, online sales and digital distribution channels, online presence, the use of social media to support sales. Furthermore, understanding the opportunities and challenges in the sharing economy is deemed important as the sharing economy has changed towards professional, platform-based business.

Other digital skills in tourism include skills in digital communication and marketing. To be able to plan, implement, and develop digital communication and marketing is vital. Understanding online customer behaviour, creating and managing content in different channels, and measuring the success of the activities are part of the digital skillset. In addition, the ability to develop online customer service, service quality, and customer satisfaction using digital tools is highlighted. Skills in understanding legislation concerning digitality and developing digital security are also considered essential.

It is important to note that digitalisation is a tool to promote sustainable tourism. Digital technologies and tools support sustainability of the tourism sector by providing access to data to make sustainable decisions and guide tourists towards responsible actions. The accessibility and visibility of sustainable and inclusive tourism products and services is enhanced by using digitality. In addition, tourists receive good-quality, interactive information on nature as a tourism attraction and sustainable use of natural resources.

However, it is important, not only to focus on single technologies and tools, but to take a holistic approach to the opportunities of digital transformation which is currently lacking. Digital skills in the tourism sector should be developed starting from the strategic level digital business planning and development to assessing and developing digital business processes.

In sum, the key implications for digital skills development are the following:

- Skills are needed at the strategic level of digital business planning and development. It is essential to understand the significance and opportunities of the digital world and digital transformation in tourism companies, their process and service development.
- It is important to develop skills in identifying new technology trends and their role in developing innovative experiences and creating a competitive advantage for the business.
- Big data and business intelligence have become a significant factor in competitiveness and productivity in the tourism sector. Skills related to the utilisation of this data for analytical purposes to make more informed business decisions are essential skill sets.
- Digital marketing communication requires practical skills. To be able to plan, implement, and develop digital communication and marketing is vital. This also involves skills in digital security.
- It is important to note that skills are needed, not only in digital marketing communication, but to develop online purchasing and sales of travel services and to utilise the opportunities of the platform economy.
- The newest trend is to utilise digitality to ensure sustainable development i.e., sustainable digitalisation.

2.2 GREEN SKILLS

First, it can be concluded that, Visit Finland Academy and its training focus on the key skills related to the Sustainable Travel Finland Label e.g., sustainability dimensions, sustainability marketing and communication, sustainable leadership, climate change, circular economy, impact management, sustainable food tourism, and ethical animal interaction. There are also various courses related to ecological sustainability in tourism, resource management, circular economy, and sustainability communication integrated in tourism and hospitality degree programmes in the universities of applied sciences.

About the skills needed, a major skill set, which emerged from the research results below, is improving resource efficiency. This includes skills in circular economy mainly related to the principles of reducing, reusing, and recycling resources, for example reducing the use of raw materials, energy, and water consumption as well as increasing the use of renewable energy. It is also deemed important to be able to find and apply opportunities to keep materials and products in use to minimise waste, for example by reusing old furniture and cutlery, or using recycled materials in work clothes and décor fabrics. Applying the principles of sharing economy, for example by sharing and renting equipment, also supports this aim. It is also essential to be able to adopt various preventative measures and recycling practices to minimise plastic and food waste efficiently, for example by replacing single-use items, avoiding the use of printed materials, and developing composting systems. In addition, skills in sustainable procurement i.e., in making sure that the products and services the company purchases are as sustainable as possible, with the lowest environmental impact. This includes procuring fresh, local ingredients, also in bulk when appropriate.

The second skill set refers to skills related to climate change and the transition to a low-carbon economy. Skills are needed to identify, assess, and prevent the impacts caused by climate change on tourism companies. This involves skills in identifying the influence of environmental conditions on the safety of tourists and preventing potential risks. It is also important to assess the influence of climate change and create solutions to combat the change in environmental resources used in product development. This means that skills are needed to develop year-round products and services to combat seasonality and tackle the challenges in

business operations in the winter season caused by the loss of sea ice and the lack of snow.

Certainly, it is critical to understand how tourism companies themselves contribute to climate change. Skills are required in identifying and implementing procedures that limit greenhouse gas emissions. This involves skills in understanding the sources of greenhouse gas emissions in tourism companies and opportunities to reduce them. It is essential to be able to calculate the Carbon Footprint generated by their actions and make plans for how to reduce and compensate for it.

In addition, there is a need for skills in promoting transport sustainability from various perspectives. It is pivotal to promote environmentally friendly ways of travelling, e.g., cycling and public transport, as well as to encourage longer stays in the selected destinations, optimise routes, and prefer direct connections. It is also essential to ensure short supply chains of products when transporting them to tourism companies. This means that preferring local suppliers should be the priority.

The next skillset, conservation of biodiversity, relates to skills in environmental protection and management of local natural resources. Tourism companies should understand the concept of carrying capacity and how to sustain it. It is also deemed important to understand governmental planning systems ensuring carrying capacity and collaborate with local government as their plans direct the tourism flows and they maintain services such as waste recycling and disposal. Furthermore, this skillset emphasises sustainable use of natural resources in tourism products: developing products related to nature conservation, managing animal interactions responsibly and utilising nature-protected areas and designated trails in a sustainable manner. In product development, also productising the wellbeing effect and health benefits of nature is essential. At the company level, skills in minimising pollution, for example by using environmentally friendly detergents and cleaning materials are required.

Another major skillset emerged from the results is sustainability communication. Skills are required in communicating to customers and other stakeholders about the measures implemented by the companies and their goals and efforts to transform towards green economies. In many cases, companies do implement various measures, but they are not communicated transparently. As production

and consumption are inseparable in tourism, equally important is to be able to change customer behaviour by increasing their customers' environmental awareness, encouraging their engagement, and supporting their transition into a green economy. It is essential to make them, as co-producers and co-creators, aware of their consumption of resources and their environmental impacts, which guides them to act in a responsible manner. This could contain information on energy-saving practices, the use of recycling bins, reusable towel and linen schemes, and food waste reduction measures.

Certainly, skills in environmental management are crucial. At the management level, understanding how the company impacts the environment and how to manage these impacts by planning, operating, monitoring, and improving its actions is emphasised. The skillset involves skills in setting environmental objectives and integrating the specifics of environmental legislation into its actions. There is a need to adopt an environmental management system to plan, act, and monitor its environmental objectives and performance. This also includes applying and managing sustainability certification schemes. Furthermore, skills in using digital technologies to integrate smartness and sustainability to manage environmental impacts is highlighted. This supports for example monitoring the consumption of resources in tourism companies and understanding and influencing guest behaviour. It is also necessary to be able to redesign supply chains and increase cooperation with the local stakeholders.

The key implications for green skills development are the following:

- A major skill is improving resource efficiency. This includes skills in circular economy mainly related to the principles of reducing, reusing, and recycling resources (e.g. in restaurants waste food management, data driven decision making and improvement of food flow process).
- The second skill set refers to skills related to climate change and transition to a low carbon economy. Both viewpoints should be considered: how tourism companies themselves impact climate change and what are the impacts of climate change to tourism companies. Carbon management is also an emerging skill that needs to be addressed (e.g. energy saving strategies in heating and cooling systems, transportation planning and methods and financial calculations in relation to new technology exploitations).

- Skills in environmental protection and management of local natural resources as well as sustainable use of natural resources in tourism products is also of utmost importance.
- Currently, a significant and much-emphasised skillset is sustainability communication.
- The most important skill set is environmental management: managing a company's environmental performance and impacts by planning, operating, monitoring, and improving its actions (e.g. holistic strategic planning based on real data).

The strategic thrust toward sustainability education is in line with Visit Finland's sustainable travel policy and recent State of Sustainable Tourism 2023 report (Business Finland), which highlights biodiversity, climate change adaptation, circular economy and reduced seasonality as key focus areas

2.3 SOCIAL SKILLS

Based on the existing training offering (existing qualifications, degrees, and diplomas) and the national tourism strategies and main reports, the key social and cultural skill sets needed by the tourism sector in Finland were identified and are described in this section.

Currently, Visit Finland Academy offers training in inclusive tourism, which consists of the following topics: segments in inclusive tourism, integrating inclusivity in tourism product development and marketing communication, and accessibility in tourism. In degree programmes of the universities of applied sciences, courses are related to e.g., accessible tourism, corporate social responsibility, customer experience management, designing employee experience, and cultural competence in customer service. As the topic itself is very wide and the social and cultural skills needed depend on the context, there are a variety of courses and training related to these skills at different levels of education.

The main skill set needed by the Finnish tourism industry relates to understanding the changes in target groups and responding to their needs and preferences. Skills are required in inclusive tourism to ensure that travel

experiences are equally accessible to all, regardless of age, sexual orientation, religion, culture, and special needs. It is necessary to understand travel experience and service processes from all target groups' perspectives and how to take this into account in business operations. This involves understanding the specific characteristics of people with physical and sensory limitations, the needs of different generations, as well as LGBT people as customers. Accessible tourism requires equal hospitality to all and skills in producing equally accessible services, products, and environments to ensure that everyone can feel involved and participate equally. In addition, their needs should be integrated into communication activities to promote their products and services. As said, customer orientation is not enough without skills to properly serve various target groups and identify their specific needs.

Indeed, skills in serving customers and meeting their needs in various service situations and understanding and managing the customer experience and journey are deemed of utmost importance. This includes understanding, how customer experience is built, how it is produced, as well as managed operationally and strategically. Customers from different cultures and their expectations in service situations are also considered important. The needed skills refer to identifying the effects of cultural diversity on international customer service and understanding the customer's value creation process based on cultural knowledge. It is also important to be able to design and develop services increasing international customer satisfaction and implementing high-level service by taking into consideration the customers' cultural origin.

In addition, skills in protecting and respecting the local culture and authenticity, as well as interacting with locals, are highlighted as the demand for authentic local experiences (the live like a local trend) has been growing for a long time. For example, participatory planning in producing high-quality tourism services requires integrating the local community, information sharing, and shared stewardship. It is also essential to support the local community by employing local people, using local ingredients and food, increasing the visibility of local culture, and doing volunteer work. In Finland, it is important to ensure that especially the Sámi people themselves are actively involved in the tourism sector.

As tourism is an ecosystem of various actors, cooperation skills are essential in tourism. These skills include understanding the strategies, advantages, and objectives of cooperation, applying different cooperation models including

cooperation, and identifying the actors and stakeholders involved. Establishing, managing, and evaluating cooperation and networks e.g., thematic, resource-based, product- and market-related networks is strongly emphasised in skills development.

Furthermore, the significance of skills in corporate social responsibility are growing. Understanding managerial work as part of social responsibility and managing employee experiences by increasing their well-being and personal safety at work is of utmost importance. Therefore, designing and developing employee experience systematically to meet the evolving organisational needs and needs of the employees has become of utmost importance. Knowing how to act responsibly and ethically and promote equality and equality in workplaces is needed.

In addition, acting in a goal-oriented and responsible way in diverse teams and developing and managing teamwork is essential. This also includes good communication and negotiation skills and emotional intelligence for better collaboration and performance. Workplaces are also cross-cultural, which means that skills in communicating, negotiating, and leading in a cross-cultural workplace are also needed.

Social and cultural skills include various skill sets and training depending on the context, where the skills are needed. From customers' perspective, tourism companies should be able to produce good quality, inclusive, and accessible tourism products and services. It is also essential to develop and manage customer experience and their journey. About this, the cross-cultural aspects are also considered. From locals' perspective, it is important to consider the local culture, cultural heritage and engage locals in tourism development. From a tourism company's perspective, it is important to increase collaboration with other stakeholders in the value chain, ensure employees' well-being at work and establish an organisational culture with functional teamwork.

The key implications for social and cultural skills development are the following: Currently, inclusive and accessible tourism are the main emerging topics in social and cultural skills development.

- As tourism is about serving customers, customer service skills and designing customer experiences are other key skills. This also involves acting in a multicultural context and understanding cultural diversity.

- Skills in protecting and respecting the local culture and authenticity, as well as interacting with locals, should be highlighted to ensure sustainable tourism development.
- Corporate social responsibility and managing employee experience are other emerging skill sets, which relate to sustainable development goals. To increase the attractiveness of the tourism sector in the eyes of potential employees, these should be paid attention to.
- As tourism is an ecosystem of various actors, cooperation skills are essential in tourism. These should be emphasised much more than the current training offering does.

Overall, the current tourism figures show that international visitor composition is diversifying (e.g., increased arrivals from Germany, UK, US), underlining the need for strengthened intercultural and inclusive service skills (Statista).

3. AN UPDATE, FOCUS GROUP DISCUSSION RESULTS

Originally, an analysis was provided of the online survey results within Finland, held among tourism professionals, HR managers and decision makers in 2023. This survey aimed to investigate the gap between current levels of (green, social, digital) skills in the tourism industry and the future skills needed in 2030 – resulting in quantitative data about the skills gaps and future needs.

Thereafter, also in 2023-24, semi-structured interviews were conducted to experts in tourism in Finland. With these interviews, the aim was to seek more detailed knowledge and fresh insights regarding trends in tourism and its employment questions. The original document can be found in Pantour documents.

As an update, in late 2025, the publication at hand discovers the latest new trends with qualitative research, using an online focus group discussion as a primary data collection method. This approach was chosen to capture insights into evolving skill needs within Finland's tourism sector — to update the previous publication. Still, focusing on *green*, *digital*, and *social* competencies. The research is based on a toolkit called [Sectoral Skills Intelligence Monitor \(SSIM\)](#) that was commonly applied through the Pantour project partners.

The conducted focus group consisted of 16 tourism professionals; Destination management organizations (3 persons), Accommodation providers (4 persons), Food & Beverage (4 persons), Visitor attractions (2 persons), and Travel agents and tour operators (3 persons).

Focus groups are well suited for exploratory research because they allow participants to present shared experiences, debate differing viewpoints, and build collective meaning (Krueger & Casey, 2015).

The discussion was recorded, transcribed and analysed using **thematic content analysis**, which identifies patterns and relationships in participants' narratives (Braun & Clarke, 2019). Similar and contradicting answers are provided below.

3.1 INTRODUCTION

According to focus group discussion, mega trends have a significant effect on the travel industry; aging populations and growing well-being challenges are the most significant megatrends shaping the future of the travel and restaurant industry in Finland. For example, as the population ages, customer needs and purchasing behaviors are changing, while the shrinking working-age population makes it harder for companies to recruit new employees.

The demographic shift is accompanied by physical and mental well-being issues among employees, emphasizing the need for stronger leadership and workplace wellness management in the service sector.

Urbanization is another major driver of change, increasing customer volumes in cities while diminishing services in rural areas. As young people migrate to urban centers, local businesses in smaller municipalities face declining demand and worsening labor shortages. These trends are reshaping business concepts and customer structures, for example, in areas where urban development alters neighborhood demographics and consumption habits. Some places and destinations suffer from overtourism, whilst others struggle to even exist.

Digitalization and artificial intelligence are creating new opportunities for efficiency and growth. One-fifth of the informants see digital and AI-based tools as key to the future, enabling smarter operations, better customer targeting, and improved marketing reach. However, adapting to technological change requires a cultural shift — companies and employees must embrace continuous learning and new ways of working to fully benefit from new innovations. Offering training and fully taking advantage of new systems always call for additional resources.

Lastly, influential forces include geopolitical shifts, climate change, and evolving consumer values. Global market disruptions, sustainability demands, and changes in food culture are redefining competitiveness in the sector. Thus, all the mentioned topics put together, these megatrends highlight an ever-transforming industry that must balance human well-being, technological progress, and environmental responsibility.

3.2 SUMMARY OF THE DISCUSSIONS ON GREEN / ENVIRONMENTAL SKILLS

Across the informants, sustainability was discussed as the sector's "licence to operate." Participants noted that green skills have shifted from optional values to rather operational necessities.

Destination management organizations (DMOs) described a growing demand for more standardized measurable sustainability indicators, carbon-footprint reporting, and the ability to communicate more clearly climate actions credibly to international markets and individual travellers. They emphasised Visit Finland's Sustainable Travel Finland programme as a unifying framework, yet noted that small firms still struggle with data

collection and certification costs, because of the lack of resources and knowhow.

Accommodation and F&B providers spoke of “micro-level” environmental management: food-waste reduction systems, local sourcing, energy monitoring, and circular-economy solutions (reusing furnishings, composting). Many rely on staff intuition rather than systematic training, and seasonal labour turnover weakens continuity.

Visitor attractions and tour operators viewed climate uncertainty as a concrete operational issue—shorter winter seasons and unpredictable snow conditions are already altering product design. They anticipate stronger demand for “regenerative” tourism and biodiversity-linked storytelling by 2030

As an overview: by 2030, carbon accounting, resource efficiency, and sustainability communication will be valued from job seekers looking to enter the tourism industry. However, participants stressed that effective upskilling from the industry point of view must stay hands-on—through rather very brief, locally relevant content rather than lengthy theoretical courses.

3.3. SUMMARY OF THE DISCUSSIONS ON DIGITAL SKILLS

All groups agreed that individuals’ digital competences define competitiveness, and the **skill gap is widening**. The conversation reflected the same duality identified high enthusiasm for AI and automation but limited applied know-how.

Accommodation and restaurant operators rely heavily on booking systems, POS analytics, and dynamic pricing tools, yet only a few use AI-driven marketing or revenue optimisation.

DMOs have begun experimenting with AI-assisted destination marketing and customer-journey analytics. There are challenges in sharing data across partners and platforms due to fragmented systems and differences in motivation and knowhow.

Food & Beverage providers highlighted “digital discoverability” — the ability to appear in such applications as Google Maps, TripAdvisor, and social channels — as a lifeline. Many small entrepreneurs lack skills in digital advertising, automation, and analytics interpretation, though there are many opportunities.

Tour operators foresaw new job profiles emerging: *AI content designer, data-driven product developer, and digital experience curator.*

Trainings could consist of sector specific mirrored content such as: **short, practical, free-access sessions** on marketing automation, AI content generation, and cybersecurity. Participants insisted that “learning must happen in rhythm with the season”— for example off-season online workshops lasting 1–2 hours that simultaneously help the employer with real-life exercises.

3.4 SUMMARY OF THE DISCUSSIONS ON SOCIAL AND CULTURAL SKILLS

The discussion reaffirmed that Finland’s tourism identity remains “people-centred”. In other words, even though digitalisation and automation are transforming the sector, Finnish tourism’s *core value* still lies in **authentic encounters between people, i.e. soft skills** — visitors, hosts, and local communities. Fairness, cooperation, and staff well-being should be seen as essential values for attracting and retaining talent in a high-turnover sector.

Guests value the *human warmth, sincerity, and hospitality* of Finnish service providers. Tourism experiences in Finland often involve direct contact, as there are small-group tours, local guides, community events, and co-creation with residents.

Yet, it was also noted that social and cultural competencies are diversifying rapidly as visitor segments evolve and part-time jobs interest a wide variety of people; Finnish and international.

Across all subsectors, inclusivity, accessibility, and intercultural communication were named as “non-negotiables.” Providers are receiving more guests with special needs, different cultural backgrounds, and expectations of personalised service.

Visitor attractions underlined empathy and storytelling as essential for memorable experiences. “*A digital booking starts the journey, but human warmth completes it,*” said one museum manager.

Employers echoed recent job-ad data: teamwork, resilience, and emotional intelligence are in high demand. Staff shortages have forced multi-skilling. For many front-line workers, they should be able to handle marketing, sales, and guest care.

Social sustainability within organisations was another key theme. Participants stressed leadership that safeguards employee well-being and ethical work culture as prerequisites for retaining talent in a high-turnover sector. On the other hand, self-management capabilities was mentioned many times.

By 2030, these valued social competencies are expected to grow: *cross-cultural empathy, inclusive design mindset, and co-creation with local communities.*

SKILLS SYNTHETIS

A skilled workforce is essential for the sustainable growth competitiveness of the tourism sector



The findings presented in this updated report serve as a roadmap for policymakers, educators, and industry stakeholders to collaborate effectively in shaping the future of tourism workforce development.

In essence, the PANTOUR Country Skills Profile Reports serve as a call to action, urging stakeholders to prioritize skill enhancement initiatives and embrace innovative practices to ensure the continued success and resilience of the tourism industry in the years to come.

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 linkedin.com/company/pantour-pact-for-next-tourism-generation-skills/

The research design for this report was approved by the Ethics Board of Breda University of Applied Sciences (NL) with reference number BUas-RERB-23-03-Pantour-



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Co-funded by the
Erasmus+ Programme
of the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor the granting authority can be held responsible for them.

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APPENDIX 1. Visit Finland's training offering

Responsible tourism	Digitalisation and marketing	Business intelligence
Inclusive tourism	Search engine optimisation	The basics of business intelligence
Sustainable tourism	Marketing communication	Revenue management
Sustainable Travel Finland Programme	Social media	Digital customer experience development
Safety in tourism	Visit Finland DataHub	
	Digital marketing	Business development
Sales and distribution	AI in tourism	Quality management
FAM-trips	Digital distribution	Strategic management
Distribution channels	Digital sales channels	Internationalisation
Sales channels	Digital customer journey	
	Word-of-mouth marketing	Product development and pricing
Customer insight	Google analytics and marketing	Service design
Segmentation and target groups		Storytelling
Customer experience management	Themes	Product development
Market information	Well-being and sauna	Product descriptions
	Culture	Benchmarking
	Nature	
	Luxury	
	Education	
	Food	