

Tourism potential in Helsinki

Helsinki Tourism Foundation

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The most interesting investment



Tourism in Helsinki could easily be doubled

2x

The basic concept and mandate of the Helsinki Tourism Foundation



The need to understand the real potential for tourism is based on the Helsinki Tourism Foundation's strategy: to serve as the catalyst of tourism in the Helsinki Metropolitan Area. A catalyst is something that causes a reaction in other elements around it.

Great. But who are these other factors? What are striving at, or more to the point, what reaction is it that we want to initiate in society at large? In other words, of what real benefits could the Helsinki Tourism Foundation bring to society as a driving force? Is the Foundation destined to remain a vague background organisation giving out grants for various research, study and development projects or could it be something much more than that?

After careful consideration and discussions, we at the Helsinki Tourism Foundation came to the conclusion that need to take a more proactive role.

Our first step is to help the travel industry, its stakeholders and decision-makers to realise the true potential of tourism. The purpose of this study is to kick off a more extensive futures project in the field of tourism. Helsinki has every opportunity to double its volume of tourism within the next ten years.

We wish to thank all those who were interviewed for the study for their valuable ideas and information. The interviews focused on the role of the cities, the government and service resources. We want to thank the Tourism Potential in Helsinki workshop for their superb work in compiling the content.

Tourism potential in Helsinki

An overview of the growth and development of travel industry in competitor cities shows that Helsinki has fallen behind. Helsinki could in theory double its travel industry revenues. If we manage to make this leap, it would bring additional three million euro income to the region and 30,000 new jobs in the travel industry. Indirect impact included, the number of jobs could reach up to 45,000.

The Helsinki Region is also important for tourism in Finland as a whole. Tourism revenues in the region of Uusimaa are seven-fold compared to those in, for example, in Lapland and accounts for half of total tourism revenue in Finland. Tourism in Helsinki and Finland is on the rise, and this is being recognised in various reports and has resulted in additional funding, but have we really

appreciated our true potential? This would require a giving tourism strategically a whole new role. Financially, the travel industry is on a solid basis, but otherwise the approach is somewhat amateurish. For the change to happen, we need thorough investigation of the potential and commitment from stakeholders.

As a neutral operator, the Helsinki Tourism Foundation is a credible initiator for the discussion. But in order for us to be able to take things forwards, the government and local authorities must provide resources and take ownership in the matter. The role of companies, investors, constructors and schools is central, but it is important to first ensure that the public sector does what it needs to do to enable such a leap. The travel industry is sure to follow and take advantage of the opportunities

created. Helsinki and the Metropolitan Area, as referred to in the report, includes the cities of Helsinki, Espoo and Vantaa. Deep and genuine collaboration between these municipalities is essential for the success of the project.

In addition to the research review, the methods used in our report included expert interviews and workshops, and new information, insights and the larger picture formed as a result have informed the entire report. The research review is naturally based on secondary sources and is, therefore, not always directly comparable. This means there can be no common operative definition. and the data is therefore indicative only.



2. Helsinki and the Metropolitan Area

In the past few years, Helsinki has gained recognition as an interesting travel destination. Articles and features in leading international publications have drawn attention to the Nordic city that thanks to its combination of natural environment and urban vibe offers visitors a highly positive experience.

Close to the sea and nature, the many events, restaurants, design, art museum and many other points of interest are repeatedly praised in articles about Helsinki. Cleanliness, safety, the reputation of our schools, approachable people who speak foreign languages adds to the appeal.

Limited Sunday trading, occasionally inhospitable service and shortage of both luxury hotels and budget or hostel accommodation, poor level of services for groups and Helsinki's reputation as an expensive city have earned it criticism.

Top rankings in various comparisons have brought attention to Helsinki. Helsinki's position between the East and the West has been well utilised, and Finnair's Asian strategy plays a major role in enabling several direct flight connections.

The fast train connection to St Petersburg links Helsinki with a metropolis with a population of 10 million. The numerous ferry services to Tallinn and Stockholm form a route network for daily travel and unique experiences crossing the Baltic. Helsinki is easy to reach from anywhere in Finland by land and air. Tourism in Helsinki has shown steady annual growth of a few percent.



**Travel industry is the fifth largest
export industry in Finland**

€4 billion

**revenues comparable
to exports**



3. Tourism



Tourism is globally a significant and growing industry. As the middle class is growing, more people can afford to travel. In many cultures, travelling is a sign of desirable lifestyle. People are looking for stories, souvenirs and the feeling that only encountering a different place or culture can give.

Social media and the easy documentation of travel experiences in photos and videos and sharing them with others, turn travel into social currency among a person's peer group. It inspires others to follow the example.

Domestic travel plays a significant role in a person's life and in the success of Finland's travel industry. Spontaneous trips, visiting family, the tradition of going skiing during winter holidays, and cultural minibreaks are an important part of Finnish travel culture.

Travel is currently an appealing topic in the media, with the emphasis varying between luxury holidays and exotic cooking to sightseeing.

Travel marketing by government and municipal organisations, hotels, booking websites and other actors has exploded. Most of those who have at some point in their lives travelled, are members in various loyalty schemes, which actively market opportunities for a change of scenery.

Events, conferences, festivals pull large crowds in one place. Companies and groups from small teams to entire school classes use travel as an incentive and a framework for learning. Leisure travel has become highly experience-seeking. Business travel, on the other hand, should be as effortless as possible.

Safety, cleanliness, friendly service and value for money are at the top of the list for all travellers. Helsinki has great potential to become a winner in the growing travel markets.



4. The role of tourism in Finland

The role of the tourism as a driver of prosperity in the Helsinki Metropolitan Area and Finland in general has perhaps not been fully understood. Despite the apparent success, the modest growth and statistics widely available show that the value of tourism as Finland's fifth largest export business remains unrecognised. Travel is about new experiences, image, freedom and fun, and its importance is widely accepted, and yet it has not achieved any significant strategic status in thinking. While tourism is duly mentioned in various strategies and speeches and plans for the future of Finland and the Helsinki Metropolitan Area, real actions and resourcing remain ineffective.

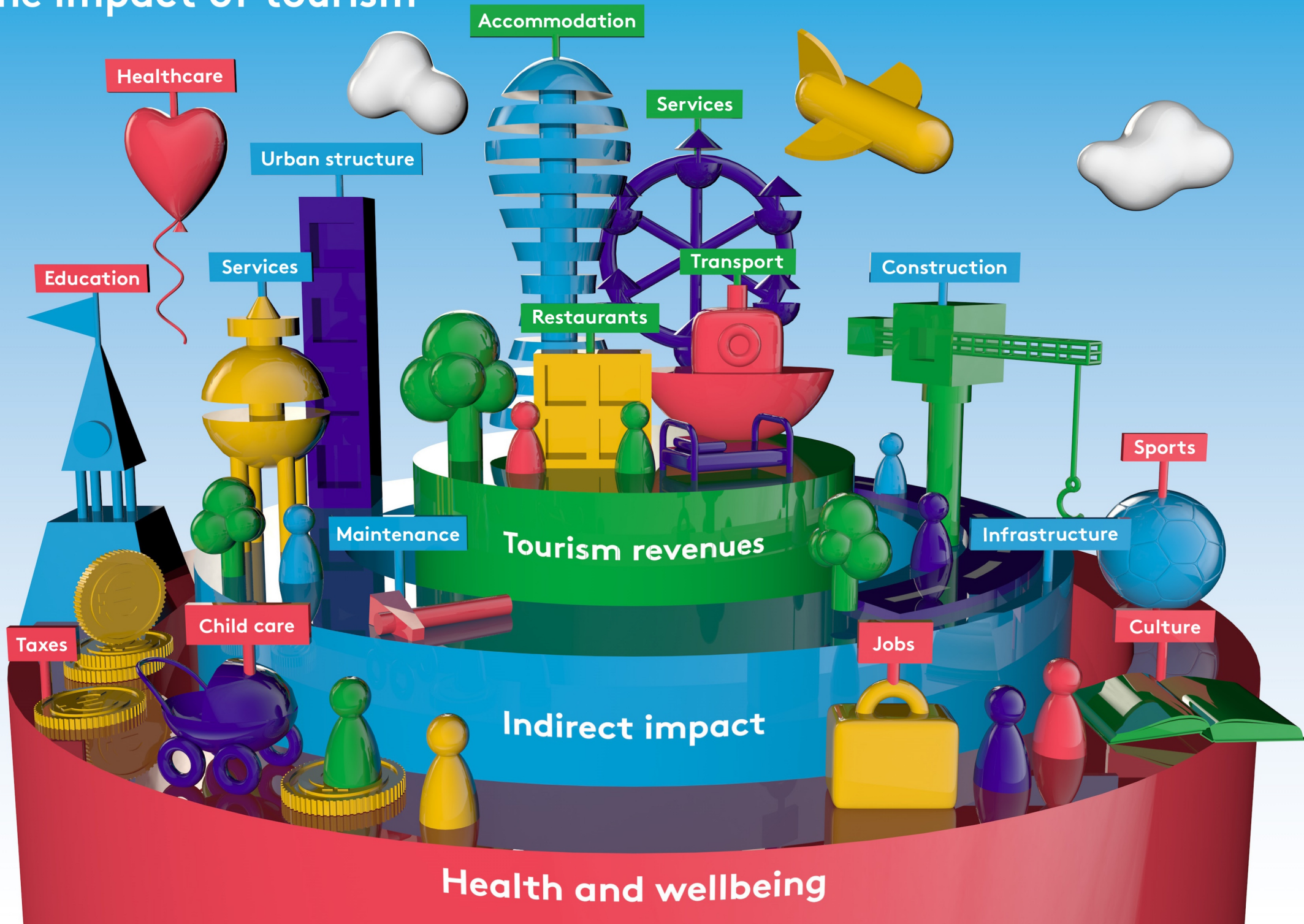
Investment in research, development, training, marketing and sales in tourism stands in stark contrast to the resources afforded to the economy and employment in general. The travel industry is one of the cornerstones of the economy in the Helsinki Metropolitan Area and Finland. The total value of Finnish travel industry is 14.4 billion euros.

The indirect impact included (construction, maintenance, health services etc.; factor 1.56), the total impact of tourism is 22 billion euros. Tourism is already a larger industry than forest industry, food and beverage industry or mining.

In 2016, the total value of tourism in Helsinki (excl. Vantaa and Espoo) was 2 billion euros. Indirect impact included the value amounts to 3.12 billion euros. Tourism creates 140,000 jobs in Finland (excl. public sector, retail trade, temporary workforce, hotel construction, interior designers, maintenance, etc.) In Helsinki alone, 30,000 people are employed by the travel industry. Tourism is a labour-intensive sector. Increase in demand creates more jobs on average than in other sectors. It offers jobs to young people, many of whom start their working careers in tourism. More than 30% of workforce in tourism are younger than 26. All foreign spending in Finland contributes to the national economy. Every individual who is satisfied with their travel experience in Finland and Helsinki is a potential new fan, who will tell their friends and inspire others to come.



The impact of tourism



Revenues from the travel industry in Finland

14.4

billion euro

with an indirect impact of 22 billion euros

Tourism potential

Domestic travel invites domestic spending on services, keeping the wheels of the economy turning and gives people jobs. Revenues from tourism, which is comparable to exports, is 4 billion euros. Finland's fifth largest export industry is managed at the Ministry of Economic Affairs and Employment by 1.5 employees with no allocated budget. Visit Finland uses its 10 million euro budget (incl. salaries, events, marketing) to manage all joint marketing, which means that it has to make drastic prioritisations. The additional resources of 8 million euros awarded in 2017 fortunately makes this task a little easier. The City of Helsinki tourism budget of 5 million euros (incl. salaries, events etc.) leaves approximately 1 million euro each year for communications and marketing.

This sum is stretched to cover marketing throughout the world.

Training in the travel sector is provided in higher educational institutions of good standard, the University of Lapland being the only place offering master's degree courses in the field.

And yet, the travel industry is doing well. Finnair's Asian strategy has proved a windfall, and the Helsinki-Vantaa Airport is faring well in the competition for passengers while Finnavia is heading an ongoing improvement programme for the airport. More hotels are gradually surfacing and Lapland has established its appeal as an iconic travel destination. Small investments, a state-owned airline, the proactive approach of travel industry stakeholders and the global growth trend in tourism have together resulted in a healthy travel industry in Finland.

The key question is, have we come as far as we can or have we only laid the foundation for something much bigger? Have we already reached the top or should be start preparing for a new conquest? Are we facing an opportunity, the magnitude of which we cannot quite appreciate? Finland has given the world generations of successful NHL ice-hockey players, rally drivers and world-class classical music conductors, to mention just a few. What if we had never allowed these stars to shine and leave their mark on the world? Then why are we keeping one of the world's most exciting country and city destination such a secret? Naturally, this must change. We have excellent travel expertise and great people working for us, we have a lot to offer and great ambition. However, the ultimate collective effort and vision seem to be missing. Let's take a look at what are competitors are doing.



Tourism creates

140,000

**jobs in Finland
each year**



5. Competitor comparison

We compared Helsinki to Stockholm, Copenhagen and Hamburg, which are of approximately similar size to Helsinki and located around the Baltic, as well as to the slightly smaller Tallinn, Helsinki's collaborative partner under various initiatives. Glasgow, in turn, has shown that a city where it rains on 60% of the days around the year need not even have its own airport to be a success story in tourism. Our main focus, however, is on the first three cities mentioned. We focused on the essential. Points of interest, branding, reputation, and other similar aspects were excluded from the comparison. We only wanted to gain an understanding of the strategic role of tourism in these cities and how it has translated into the provision of resources and capacity. This angle seemed the most pressing one, as the occupancy rate (75%) at Helsinki hotels is too high and the capacity appears to be "sold out" in no time. Give Helsinki one major event, and the prices will shoot through the roof and the hotels are full to the hilt.

Unfortunately this means that we are constantly turning down business simply because of insufficient hotel and event space capacity. If, for example, the Helsinki Fair Centre is full, large conferences have no option but to take their business elsewhere. Or when SLUSH is on, a family from Rovaniemi can forget about a city break in Helsinki. They will move on to Tallinn without so much as a stop in the Helsinki.

But without further ado...

The following graphs give more detailed data on this development but the overall pattern is as follows:

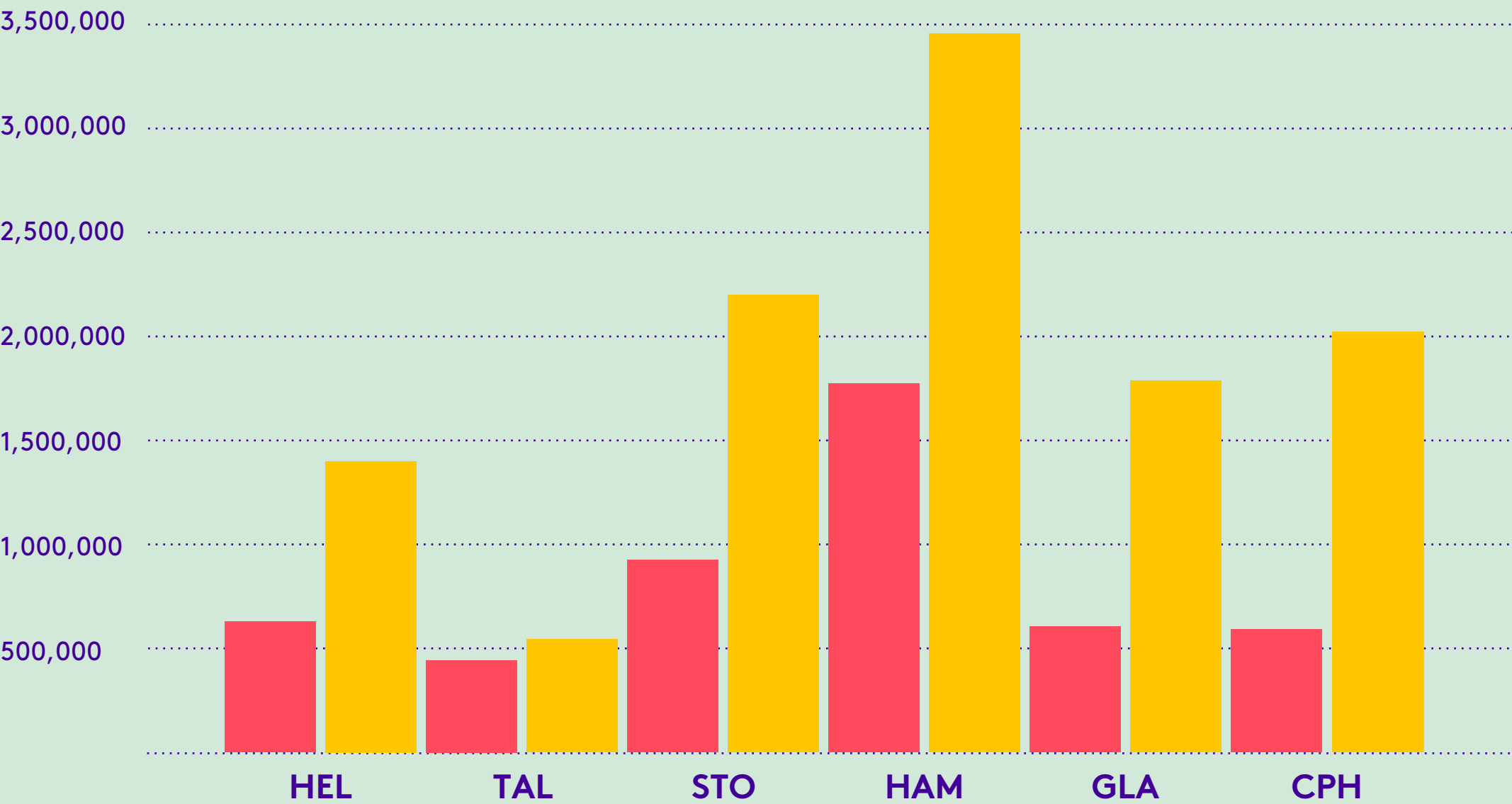
- a) Helsinki is slightly smaller than its three main competitors. Hamburg is the biggest.
- b) The GDP keeps in proportion to the population. In terms of GDP per capita, the situation is quite even. Hamburg remains the wealthiest, but we are catching up with Stockholm and Copenhagen.
- c) Revenue from tourism is clearly lower than that in Stockholm, Copenhagen or Hamburg. Why?
- d) Revenues from tourism in relation to GDP in clearly lower in Helsinki compared to the other cities. Has this always been the case? We decided to investigate growth and capacity data for 2005–2014 more closely.
- e) The cities had taken the risk of creating added capacity, which eventually nearly doubled the number of nights spent in Hamburg, Copenhagen and Stockholm.
- f) The cities have been proactive in promoting the travel industry. Rather than wait for the growth to happen, they created it by provided added capacity.

Supply has followed the demand. If Helsinki had shown similar growth as Stockholm, the number of nights spent would be 4.7 million instead of 3.5 million.

In a nutshell: Helsinki's competitors have spent the past ten years raising the status of tourism into one of a strategic spearhead, encouraging travel industry stakeholders to invest and facilitated the doubling of the industry during the period under review .

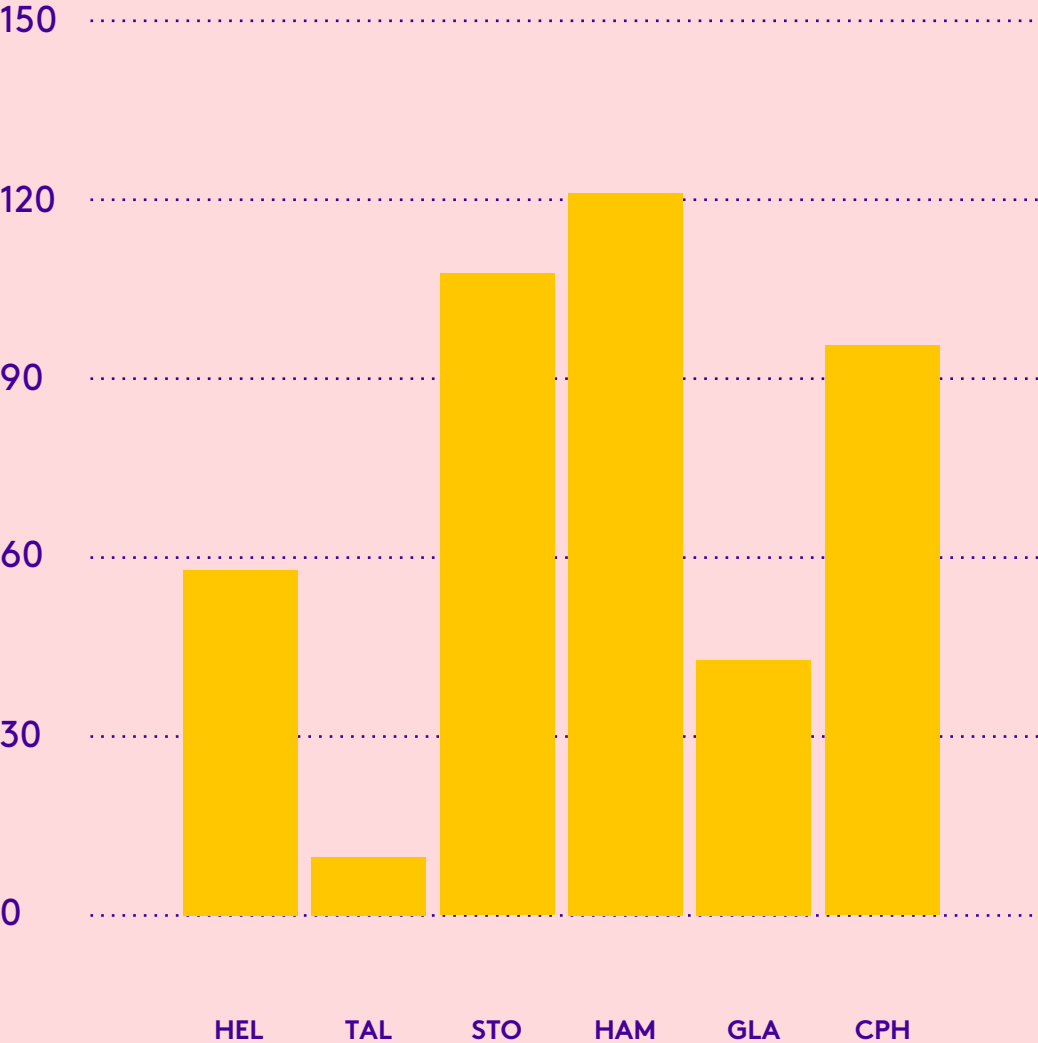
a) Population

Population city
Population metropolis

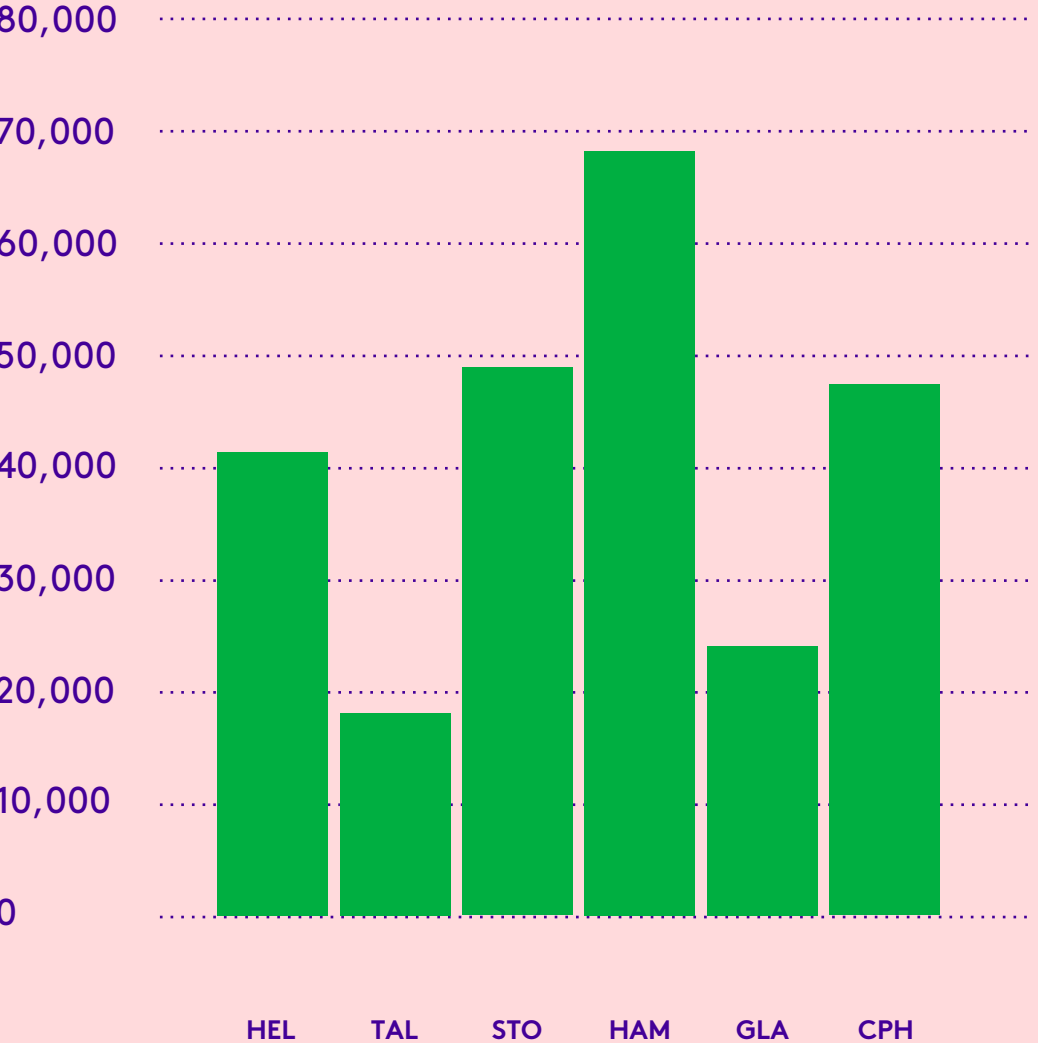


b) GDP and GDP per capita

Purchasing power adjusted GDP 2014, € billion

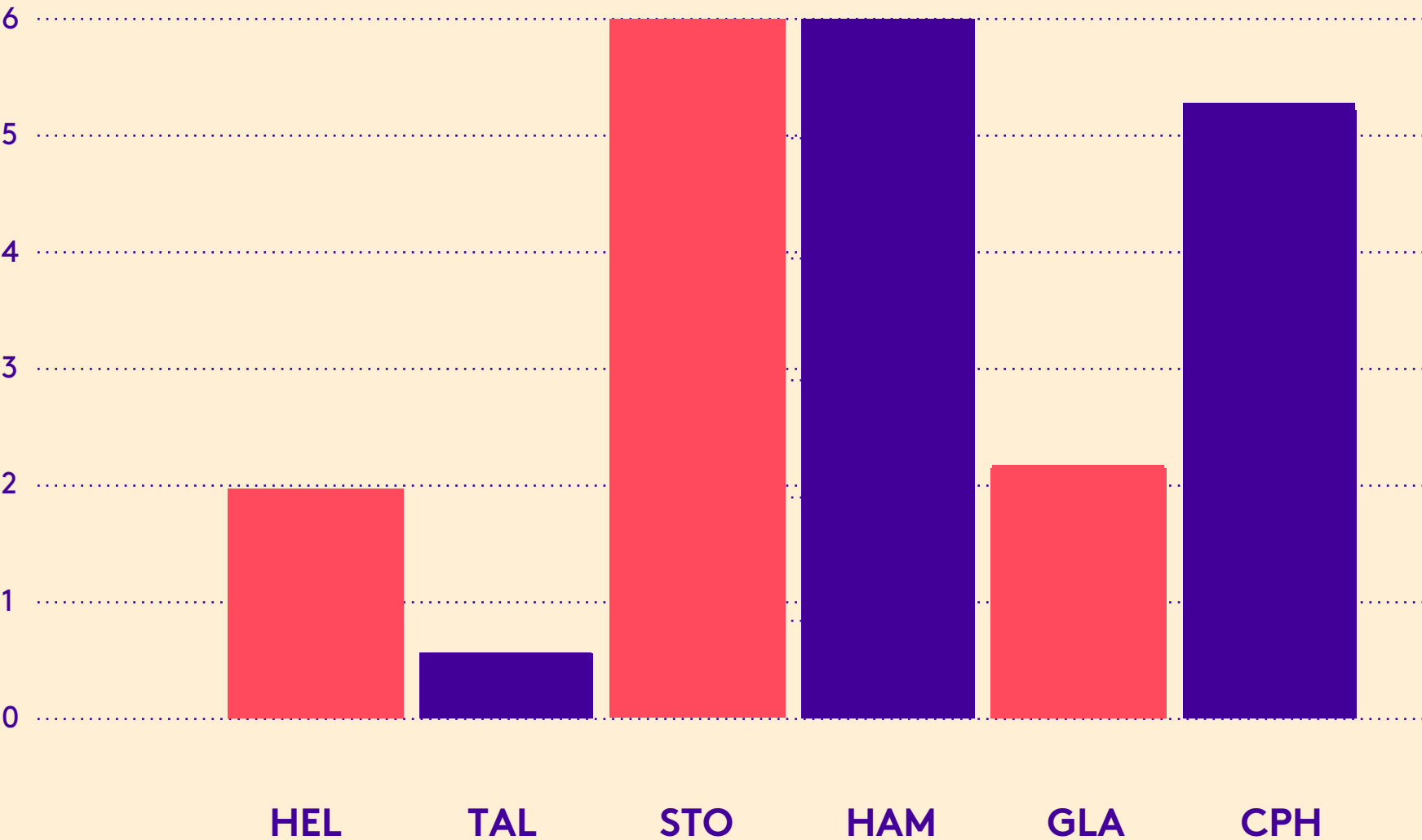


Purchasing power adjusted GDP per capital, €



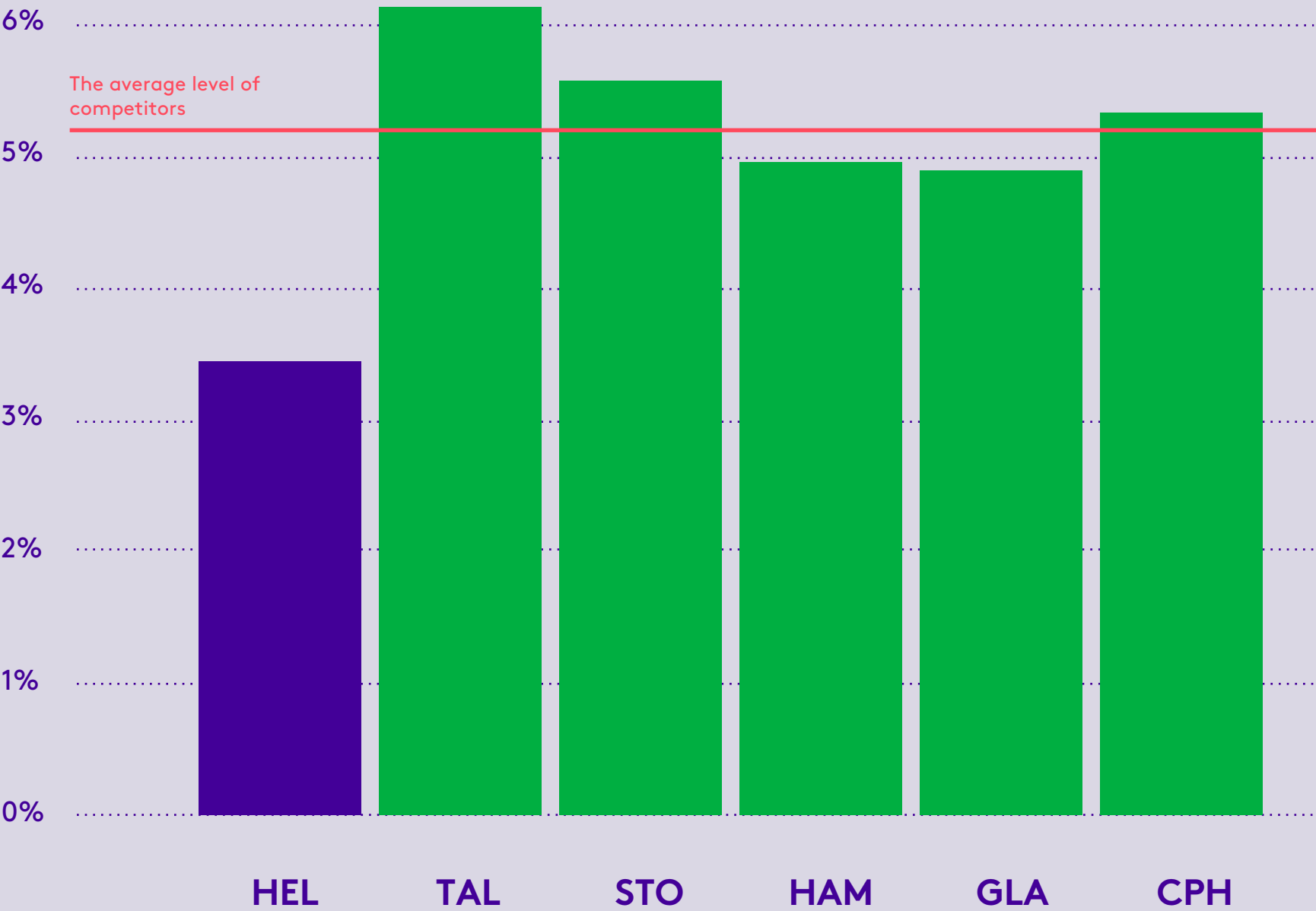
c) Revenues from tourism 2014–2015

€ billion (partly based on estimates)



The value of the travel industry in Hamburg was €2.7 billion in 2004 and €6 billion in 2014. The value consists of hotel and restaurant sales and travel ticketing as well as sales in restaurant and retail services. The sellers have submitted information on the proportion of sales accounted for by tourists. The figure for Stockholm is the author's own estimate based on comparing the value of accommodation sales vs Helsinki. The total value of the travel industry in Sweden is estimated at €30 billion. The value of accommodation sales in Stockholm was €737 million, while the figures for Helsinki and Tallinn for 2015 were €236 million and €115 million respectively.

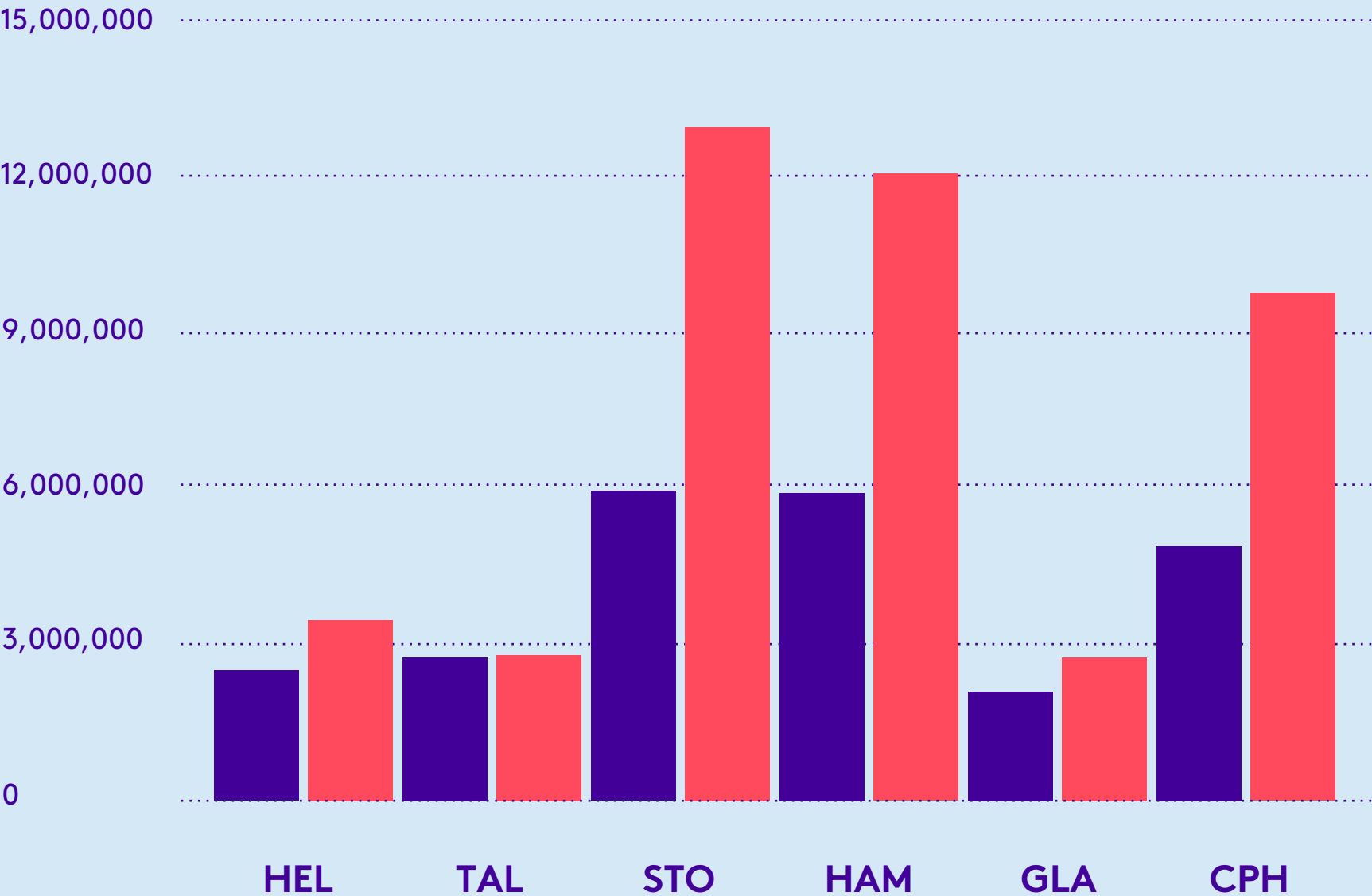
d) Revenues from tourism in relation to GDP



These factors should be interpreted with caution. The size of the travel industry per city has been collated from a number of sources. Data for the purchasing power adjusted GDP/city is obtained from one source. In Estonia, tourism spent a total of 1.3 billion euros, and Tallinn’s share of the visitors was 51%. The figures for Helsinki were lower than in the benchmark cities (4.9% in Glasgow and 5.6% in Stockholm). Visitors spent in Stockholm 44% more money in 2014 than in 2003, a clear indication of the substantial growth of the industry. Business travellers are typically the biggest spenders, with 10–20% more money spent compared to other visitors.

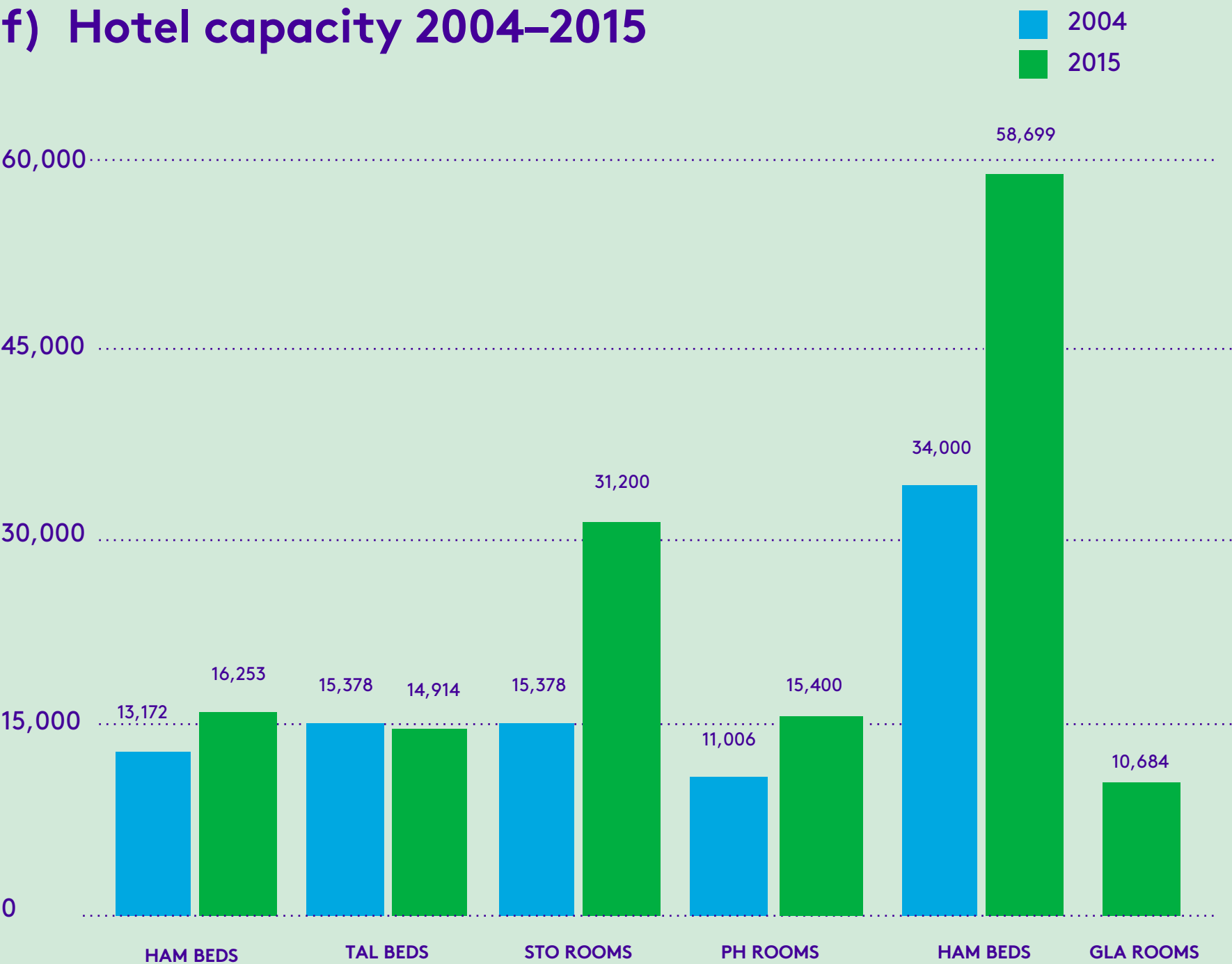
e) Hotel nights spent 2004–2015

■ Hotel nights 2004
■ Hotel nights 2015



In Stockholm, Hamburg and Copenhagen, the increase in the number of nights spent has been rapid. The number of nights spent has doubled over a period of ten years. Had Helsinki kept up with Stockholm, the number of nights spent in Helsinki would be 4.7 million instead of 3.5 million in 2015. Stockholm, Hamburg and Copenhagen, which are all in a steady growth path in terms of nights spent, have seen over a hundred new hotels and thousands of rooms adding to their capacity. In Hamburg, tourism has become one of the core businesses for the city thanks to its dynamic growth. Number of nights spent is expected to increase by 1 million, totalling 11.5 million this year. “Upgrade to Hamburg”.

f) Hotel capacity 2004–2015



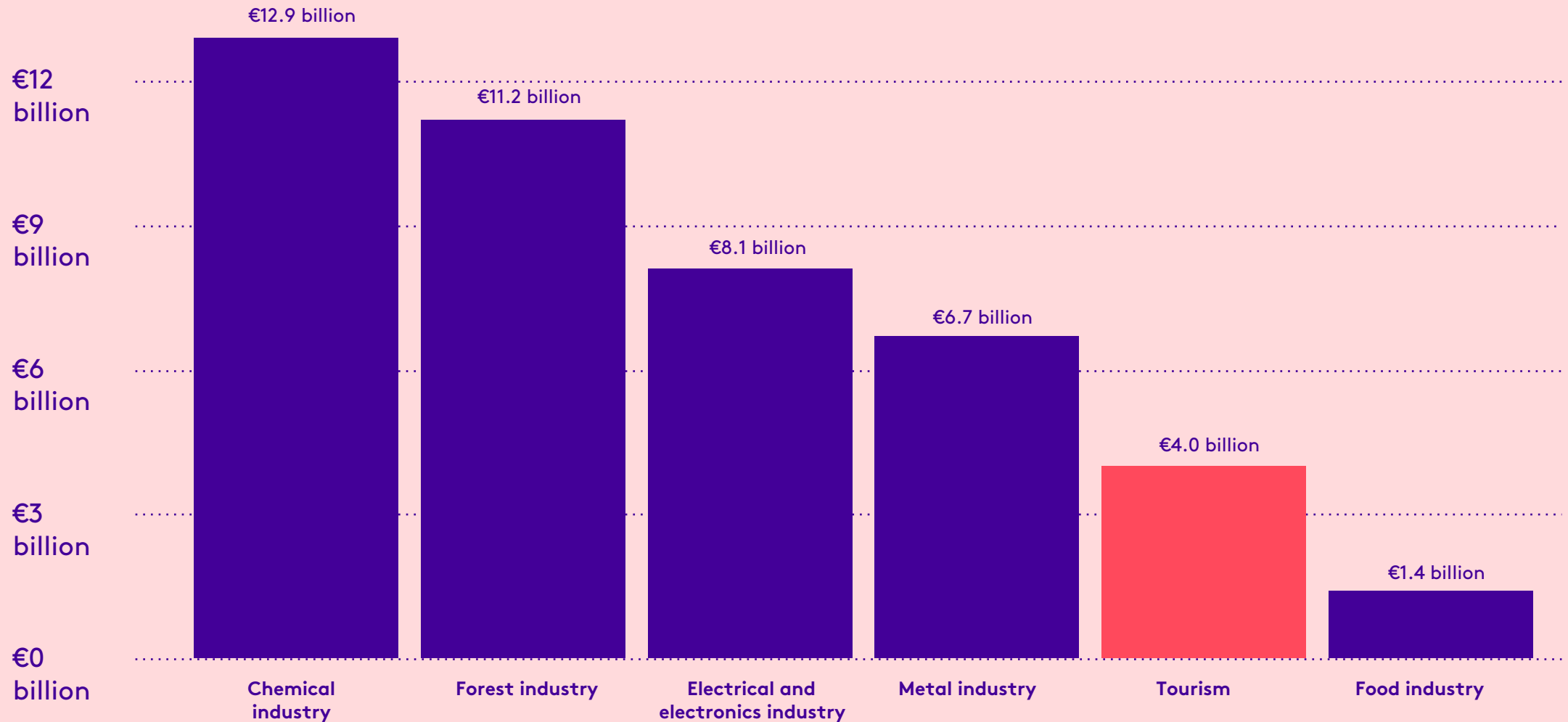
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Travel industry is the fifth largest export industry in Finland

The value of tourism and certain export commodities in 2014

(Source: Matkailu ja muut vientialat 2014, MaRa)





**“Is this Nordic City
the Next Capital
of cool?”**

Vogue

6. Conclusion

Global travel markets are growing, which also triggers growth in tourism in Finland. Helsinki and the Metropolitan Area have everything it takes to become one of the world's most desirable travel destinations. While we need iconic places to visit, better services, tailored programmes, luxury products, unique locations, unusual stories and what not, we should never lose sight of building a solid foundation for all this. Tourism is about selling capacity. If we have no capacity to sell, the travel industry and the services it supports have nothing to grow on. Accessibility, accommodation capacity and event spaces come first, so that everything else can follow. Without this basis, the visitors have literally nowhere to go to use the services on offer.

Restaurants, culture, events, beauty and health, sports, parties, trade fairs, conferences, training events and many other services play a key role in creating the best possible experience and generating economic activity.

A good experience always comes from the service and the people providing it. The appeal of tourism as a career and place to work is important. Increasing and improving the provision of training in the field guarantee that the built capacity and the services created will be provided with high standard and used in high volumes. All this needs to be boosted by a concerted sales and marketing effort.

With the current resources and financial investments, we stand little chance of catching the attention of tourists or travel organisers, let alone the trend makers in the conventional or social media. Those responsible for the marketing of Helsinki are fully aware of how and where they should be involved to make an impact. The fact is, they do not have the necessary time and resources to do what they are supposed to do. Naturally, this is a dilemma that needs to be resolved in collaboration between companies and other stakeholders, but the fact remains that Helsinki needs more consistent destination marketing and sales. Currently, these efforts are led primarily by the municipal authorities.



We are convinced that Helsinki has all the necessary potential to start aiming higher and no reason to hold itself back. We are delighted by the growth of the travel industry, which has been greater than in many other sectors, but we are still falling short from the levels achieved by our competitors Stockholm, Copenhagen and Hamburg. It is time we take the leap of faith. We must dream bigger. Our clearer vision must be reflected in marketing and investments.

Increased supply and an engaging message will bring larger crowds to Helsinki. The quality and variety of services will make them return and recommend Helsinki to others. If our competitor cities are running their cities with high expectations, why are we not doing the same? And, if we fail to create a bigger vision, does this mean we will fall even further behind?

The travel industry needs a boost of confidence, investors more promising earning prospects and decision-makers better insight into the big picture. The sectors supporting the travel industry, including training, media and organisations, are also in bad need of renewal. The entire tourism ecosystem from policy-makers to investors and tour operators to employees must learn to see the real potential that lies in tourism.

New jobs, growing economy, the popularity and reputation of your home region, internationalism and culture, and the tax revenue generated by these, are the groundwork for prosperity and development. Tourism is beneficial for every sector of society and every age group. The ripple effect of an appealing Helsinki Metropolitan Area in the surrounding region is significant. Capacity in the Metropolitan Area to receive foreign and domestic visitors in great numbers supports the overall success of the travel industry in Finland. Ultimately everyone will be a winner!



7. Towards an action plan

We started with the assumption that the vision for the travel industry in Helsinki should be much bigger. Helsinki could well double its volume of tourism within the next ten years. We believe that the travel industry is a major factor in laying the foundations for the prosperity of our country and city. As it stands, tourism is seen as a sector that brings colour and good spirit to the city, and it is welcomed in theory. However, when the real fight for Helsinki for a place in the sun begins, tourism has been drastically overlooked, which is a grave mistake.

Tourism should be raised as one of the key strategic solution alongside other key industries. Tourism should be approached as a major contributor to the national economy, employment and wealth.

The prospect of doubling the income from tourism within the next ten years should be taken under serious discussion. One target is to create a general summary report, which could be used by different stakeholders in detailing their own business strategies.

a) Further discussion

Wider discussion in the media and social media to include all those with an interest in securing the vitality of Helsinki and Finland. The travel industry should be seen in a new light and taken under national debate as a key sector.

b) Vision and strategy for the Helsinki region

A collaborative process between all stakeholders to expand and build on the work carried out for this first initiative. This will result in a clear, extensive and irresistible proposition on tourism and its true potential. Competition, trends, forecasts and best practices in tourism will be analysed. The impact of tourism on society, mental climate, competences and economy will be explored. Scenarios based on different strategic approaches will be defined. The factors to consider include economy, employment, actions, appeal and prosperity.

- shows returns for investment
- gives material to support policy-making
- motivates strategic resourcing
- provides a vision shared by the entire country beyond terms of government.

Cover the following themes:

Investments and increased capacity

- accommodation infrastructure

Development of competencies and services

- expansion of service provision – new companies.
- education
- communications
- marketing communications
- organisation
- together – people
- Economy
- timeline

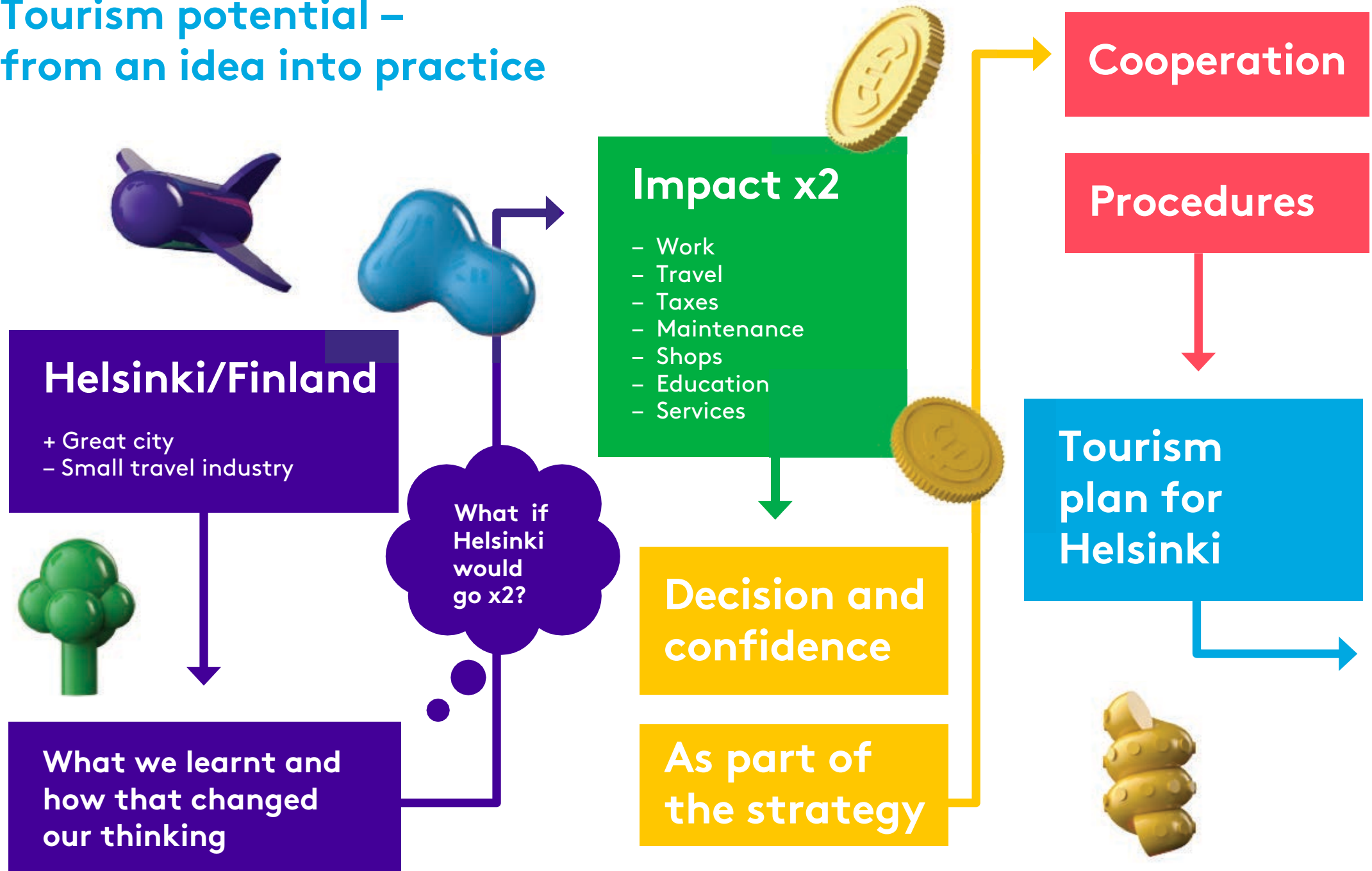
c) Event-oriented approach

Helsinki Travel Awards event is under development. In addition to presenting awards, the event serves as a framework for stakeholders in the travel industry to meet in a meaningful way.

The purpose is to give a platform for ideas on how to make use of the potential of tourism, on the effects and best practices of tourism and, more generally, on the success factors for the travel industry.

The Helsinki Tourism Foundation also engages with other initiatives promoting tourism potential. Construction, training, marketing, health and beauty services, transport and many other sectors could offer and receive new perspective into their shared goal. Thank you!

Tourism potential – from an idea into practice



Tourism plan for Helsinki – part of the overall success of the city

Vision

The most interesting city destination in Northern Europe

Target

To double the value of the travel industry in the Helsinki Metropolitan Area by 2027.

Strategy

- Keeping an open mind to utilise the potential
- Resourcing new capacity, competencies and services
- Strong communications and sales

Understanding and knowledge

- Clear view of existing strengths and opportunities
- Modern and exhaustive industry and customer experience research

Capacity and infrastructure

- Accommodation and event spaces
- Airport, ferry port and railway capacity
- Maintenance and energy

Competences and services

- Training curricula to support the industry targets
- Systematic support for the establishment, expansion and development of service businesses

Message and story

- Confidence and faith in the potential of the travel industry will increase
- Partners and stakeholders will see the benefits of the growing travel industry and will give preference to it in their strategies
- The Helsinki brand is interesting and attracts large numbers of visitors to Helsinki

An attractive investment

Favourable business environment

Sales/marketing

- The growing supply enables more profitable contracts and a more large-scale and concerted sales effort
- Modern marketing methods can be used to reach customers through channels of their choice
- All marketing channels are in active use.

Further discussion



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Tourism potential in Helsinki

workshop and interviews

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- Paavo Virkkunen/Visit Finland
- Nina Vesterinen/TEM
- Tuula Antola/Espoo
- Jaana Tuomi/Espoo
- Anders Westerholm/We Are Group (restaurants at Kamppi and Old Market Hall)
- Jose Valanta/Vantaa
- Laura Aalto/ Visit Helsinki
- Marianne Vikkula/Slush
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