BUSINESS
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EVALUATION OF VISIT FINLAND

Evaluation Report

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FOREWORD

Visit Finland works for an international image of Finland as a desirable travel destination and supports companies and groups of companies to develop and market their tourism services for the international market. The mission is to help all tourism companies and regions that are able and willing to develop to grow their international business throughout Finland. Visit Finland's goal is that Finland is the most attractive tourist destination in the Nordic countries by 2025.

Visit Finland, as part of Business Finland, offers assistance in the internationalization of tourism companies. The advisory services provide company and organization-specific sparring in the early stages of internationalization, for example, in connection with the assessment of internationalization capabilities and the mapping of the right distribution channels. In addition, Visit Finland has representatives in selected markets. The tasks of the representatives are to promote the sales of Finnish tourism companies, monitor market developments and compile market information. A certain part of Visit Finland's activities has been implemented as programmatic activities.

The aim of this evaluation was to analyze the effectiveness of Visit Finland's operations and services. The evaluation examined how Visit Finland has succeeded in creating an attractive travel destination in Finland, supporting Finnish tourism companies in the international market and developing the tourism ecosystem in Finland. With regard to activities carried out in as programmes, the evaluation is intended to provide information on the added value of programmes, as well as on the results and impact of these activities.

Evaluation show that tourism companies find Visit Finland's operations useful. Almost all companies felt that Visit Finland's operations benefit the entire tourism industry. Visit Finland's services are found as high quality among international marketing partners.

The evaluation was carried out by Owal Group Oy. Business Finland would like to thank the evaluators for the wide-ranging and multidimensional outcome. Moreover, Business Finland expresses its gratitude to steering group and all the stakeholders who enabled the evaluation by participating in the interviews and surveys conducted during the evaluation.

Helsinki, May 2021, Business Finland

1 INTRODUCTION

This report summarises the main findings of the evaluation of Visit Finland. The evaluation was commissioned by Business Finland and it was conducted between December 2020 and March 2021.

Visit Finland works to develop Finland's image as a tourist destination and helps Finnish tourism businesses to become more international and develop, sell and market high-quality travel products. Visit Finland cooperates with regional tourism organizations, travel destinations and businesses in the tourism industry. Visit Finland has a staff of 60 people and is a part of Business Finland.

The aim of this study is to evaluate the effectiveness of Visit Finland's activities in relation to its objectives and main responsibilities. The following model was created for the impact assessment (p. 6). It aims to describe the key elements of Visit Finland's impact and how impact is created as a result of interlinked activities.

A multi-method approach was applied in the evaluation. The evaluation methods are described below in brief.

Document analysis included analysis of Visit Finland's strategic and operative plans and analysis of documents resulting from key activities (e.g. programs, regional collaboration, marketing).

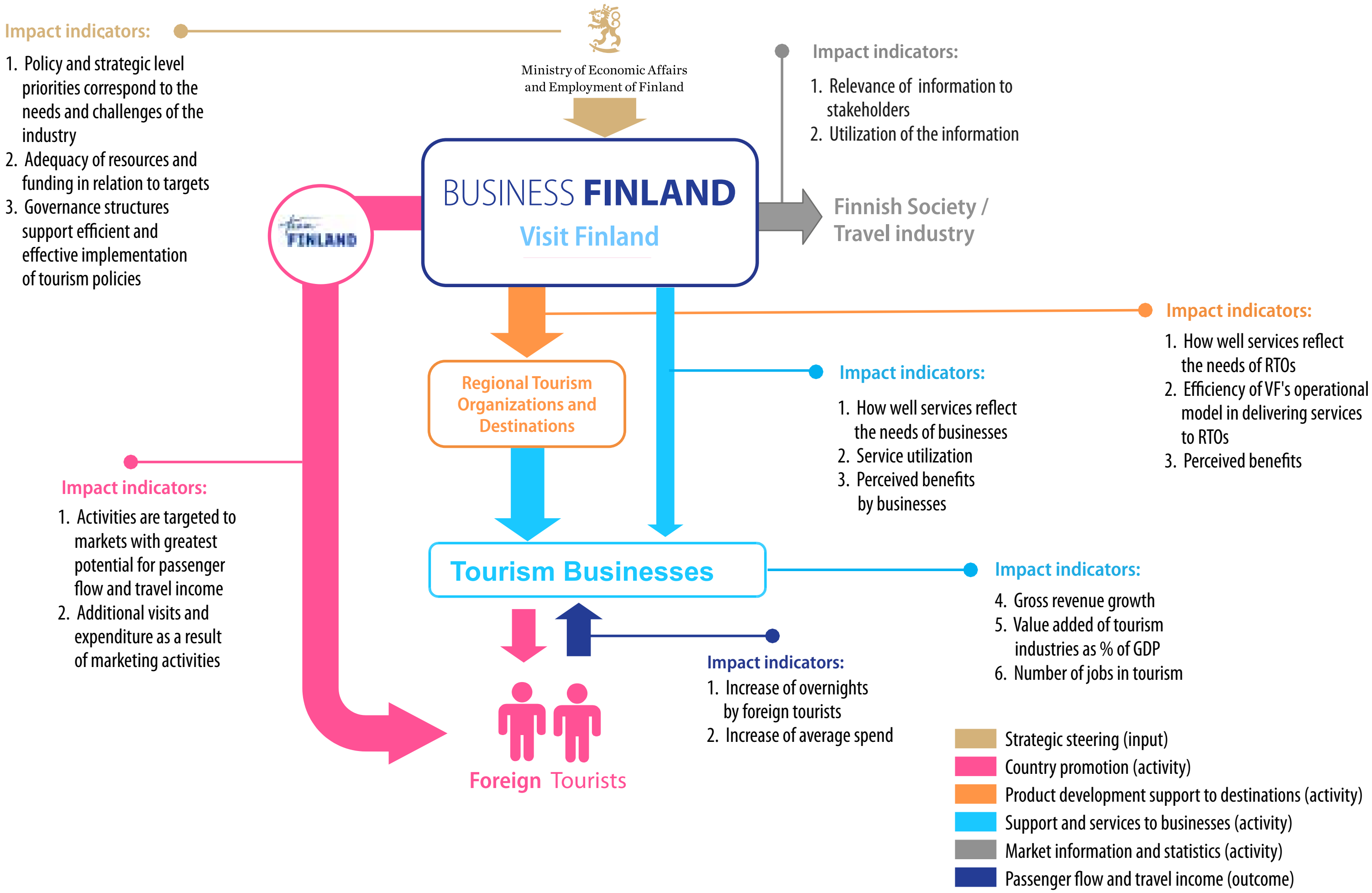
Thematic interviews. A total of 30 thematic stakeholder interviews were conducted to gain more detailed insight into Visit Finland's activities and their results. The interviewees represented all key stakeholders: companies, regional organizations, employees, government ministries, partners etc.

International benchmark analysis. The evaluation also included a benchmarking study of other Nordic National Tourism Organizations.

Tourism industry survey. The survey yielded 69 responses. The respondents represented 17 different regions in Finland and worked in different areas of the travel industry, most often the accommodation industry, tour operations or reservation services.

The respondents were asked to estimate the share of their revenue that was attributable to international travellers. 29% estimated it to be 0-5%. In further analysis,

FIGURE 1. Visit Finland Impact model.



this group was compared to those for whom international travellers accounted for a larger share of their revenue, since this group is not the primary target group of Visit Finland. 84% of the respondents estimated that international travellers accounted for less than half of their revenue. 10% estimated that the share of international travellers was more than 80%.

55% of the respondents represented micro businesses (2–9 employees) and 7% were solo entrepreneurs. 28% were small companies (10–50 employees), 4% medium-sized companies (51–250 employees) and 6% large companies (more than 250 employees). In further analysis, micro businesses and solo entrepreneurs were grouped together to represent small companies and others grouped together forming the group of larger companies.

Regional organizations survey. In total, 18 regional tourism organizations responded to the survey. A majority of respondents (67%) were from Lakeland. 17% were from Coastal Finland and Archipelago, 11% from Lapland and 6% from Helsinki region. Half of the respondents represented organizations that are 100% owned by municipalities, 17% represented units that are part of a municipality's administration, 11% were from organizations run by multiple municipalities, 11% from associations and 11% from organizations co-owned by public and private entities.

International partner survey. This third survey was aimed at international marketing partners of Visit Finland and yielded 14 responses. All of the respondents had experience from working with Visit Finland, and 63% of them had worked with VF for more than 5 years.

2 ORGANIZATION AND GOVERNANCE

For government interventions to be effective, a clear division of responsibilities is required between levels of government to avoid redundant efforts and to maximise synergies. This chapter examines the organization and governance of Visit Finland in relation to these principles.

MAIN FINDINGS

- The multiplicity of stakeholders active in development and promotion of tourism represents a significant challenge in terms of organization and governance and for the implementation of a coherent and efficient national tourism strategy.
- The fragmentation of regional and local administration makes it difficult for Visit Finland to co-operate with the regions. There are almost as many models for promoting and developing tourism as there are regions.
- Differences within and between the regions challenge Visit Finland's operating model based on four "Greater Areas". Co-operation with each region must be done differently. Four large regions can serve as a platform for international branding, but otherwise the regions seem too diverse internally.

Governance structures are of particular importance when assessing the impact of national tourism organizations such as Visit Finland. This is due to the fragmented nature of the tourism industry, which necessitates coordination of government activities at the national and sub-national level as well as coordination of the operation of private sector businesses that both compete and co-operate with one another.

Tourism services are primarily provided by micro, small and medium-size companies, although some sectors, such as aviation, are dominated by large businesses operating on a global scale. In addition, governments are involved in tourism in a variety of capacities including border security, regulation of markets such as those of the aviation business, controlling or managing tourist attractions such as national parks and museums and funding the development of roads and other infrastructure. Unless industry and government policy makers work together effectively, this complex system may not function optimally. The impact of Visit Finland cannot thus be evaluated in isolation.

From the organizational and governance perspective, the key evaluation questions are the following:

- How do the governance structures support efficient and effective implementation of tourism policies?
- Are the resources and funding adequate in relation to the targets of the tourism policy and its economic potential?

2.1 ECONOMIC SIGNIFICANCE OF TOURISM FOR FINLAND

The rationale for government involvement in tourism includes a general consensus that tourism is an effective vehicle for regional economic development, to address market failure and to effectively manage the use of public goods. In many developed economies, tourism accounts for around 2–5% of the GDP and 4–6% of total employment. When considering the indirect and induced economic benefits, the figures are approximately doubled. There is common understanding that government policy should aim to address market failure in the tourism industry and mitigate any potentially negative social, cultural and environmental impacts of tourism. The rationale for government involvement in tourism is often linked to its use of public goods (both natural and cultural) and to the spatial nature of tourism, which requires land use planning.

Tourism is one of Finland's fastest growing sectors. Income from tourism, comparable to income from exports, amounts to almost four billion euros. This is more than all of Finland's high technology exports in total. Tourism is growing globally at a faster rate than combined gross national products. According to the World Tourism Organization (UNWTO), tourism grew by four per cent worldwide in 2016, the seventh consecutive year of growth. In Northern Europe, tourism has increased by six per cent, which is clearly faster than in Europe overall, where the growth was two per cent. According to recent forecasts by Oxford Economics, growth in the numbers of tourists in Europe will come particularly from Germany, the United Kingdom and the United States. China and Japan are also among important countries of origin for tourism in Finland.

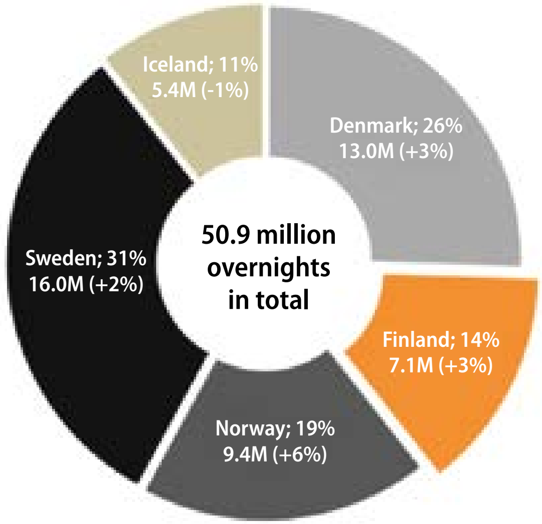
Tourism is the third largest service export industry in Finland. In recent years, tourism in Finland has grown more than other sectors. In 2018, tourism amounted to 2.67% of Finland's GDP and tourism consumption reached EUR 15,7 billion. Tourism exports have grown steadily and amounted to 18% of all service exports in 2017, being the third largest service export.

Tourism industries directly employed 142 100 people in 2018, equivalent to 5.4% of total employment, and it is estimated that this will reach 164, 000 by 2028. Around 28,500 tourism-related businesses, many of which are micro in size, recorded a turnover of EUR 9.7 billion. Growth in tourism employment since 2007 has been approximately 16%.

International visitor numbers have doubled since 2000. In 2018, 5.6 million tourists visited Finland, up 12.4% over 2017, and nights in all means of accommodation reached 6.8 million (+1.5%). The Russian Federation continued to be the largest inbound market (826,000 nights), followed by Germany (628,000 nights) and the United Kingdom (593,000 nights), which replaced Sweden in third place. High growth markets include the Netherlands (up 8.4% on 2017), Spain (up 8.3%) and the United States (up 7.5%). Domestic leisure trips reached 38 million.

The accommodation establishments in Finland recorded over 22 million overnight stays in 2018, up 1.5% on the previous year. Of the total, domestic tourists accounted for around 15.4 million and international tourists for 6.8million. In 2018, 8.7million domestic tourists were recorded, up 1.5% over 2017.

FIGURE 2. Foreign overnight stays in 2019. (Source: Visit Finland)



2.2 TOURISM GOVERNANCE AND THE ROLE OF VISIT FINLAND

The Ministry of Economic Affairs and Employment (MEAE) is responsible for tourism policy and strategic steering of Visit Finland. MEAE takes part in drafting legislation on tourism, maintains international relations and works with other ministries. An Inter-Ministerial Working

Group on Tourism, chaired by MEAE, acts as a monitoring body for the implementation of tourism policy. The working group facilitates effective exchange of information on tourism and preparation of tourism-related matters for decision-makers.

Visit Finland (as a unit of Business Finland) is an expert agency responsible for promoting Finland as a tourist destination in international markets. Its main task is to promote Finnish tourism by means of marketing communications and, in particular, by promoting Finland as a tourist destination. Collaboration with the private sector is facilitated through the Business Finland Tourism Advisory Board, which guides the work of Visit Finland. It consists of industry leaders from different branches of tourism and other tourism organizations and representative bodies.

BOX 1 A SHORT HISTORY OF VISIT FINLAND

1973-2014

The predecessor of Visit Finland, The Finnish Tourism Board (FTB), was established under the Ministry of Trade and Industry in 1973.

2015

At the end of 2014, FTB was shut down as a separate agency and its functions were incorporated into Finpro, a provider of internationalisation advisory services. The goal of the incorporation was to utilise synergies between FTB and Finpro's internationalisation services and strengthen public services for the tourism industry. A new unit responsible for the former functions of FTB was named Visit Finland.

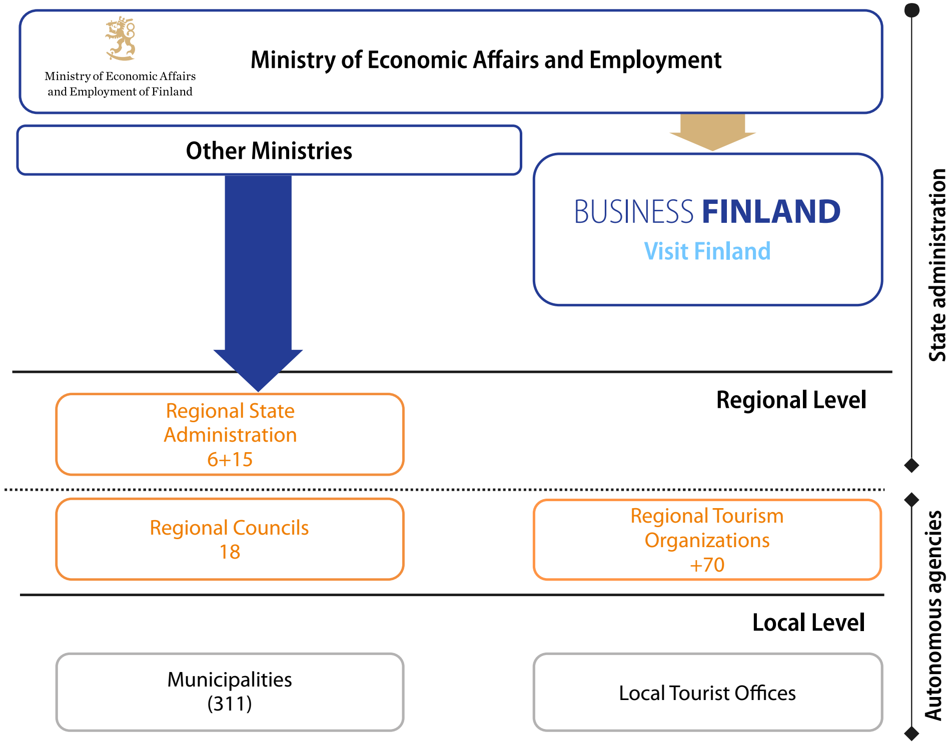
2018-

The Finnish Innovation Agency Tekes and Finpro merged and formed a new organization, Business Finland. Business Finland gathers under one roof all the services related to the promotion of innovation funding, exports, investments and tourism. The tasks of Visit Finland remained unchanged in Business Finland.

The multiplicity of stakeholders active in development and promotion of tourism represents a significant challenge in terms of organization and governance and for the implementation of a coherent and efficient national tourism strategy. There are some 70 regional tourism organizations, which have varied objectives, tasks and ownership structures. Locally, tourism matters are handled by municipalities and local tourist information offices.

The fragmentation of the industry makes it difficult for Visit Finland to co-operate with the regions. There are almost as many models for promoting and developing tourism in Finland as there are regions. Regional organ-

FIGURE 3. Tourism administration.



BOX 2 CONSOLIDATION OF GOVERNANCE STRUCTURE: Case Denmark

The number of DMOs in Denmark is being consolidated from 80 to around 20 as part of a wider initiative to streamline the governance structures to develop stronger tourism destinations and encourage more coherent and impactful public efforts to strengthening Danish tourism.

In 2017, the Ministry of Industry, Business and Financial Affairs conducted a mapping exercise of Denmark's tourism administration system. The study identified that the structures resulted in tourism development efforts being spread over many policy-making levels, leading to an extensive overlap in marketing activity and impacting the co-ordination and effectiveness of other support activities.

In 2018-2019, the main policy initiative has been reforming the public tourism administrative system as part of a wider reform of Denmark's business support system. The purpose has been to create a simpler and more effective organizational structure and governance regime, which ensures stronger tourist destinations and more coherent and impactful public efforts to strengthen Danish tourism.

In 2019, the Danish law relating to business support was amended, reducing administrative levels from three to two – national and decentralised – as well as bringing about minor changes to responsibilities and tasks. As part of an agreement with Local Government Denmark, the number of destination management organizations at the decentralised level is being reduced from 80 to around 20.

The decentralised DMOs' role is to organise, co-ordinate and operate strategic local business support activities, which develop geographic areas in Denmark into strong and coherent tourist brands and destinations. A newly established Board for Local Business Promotion is responsible for grant funding to local tourism development activities.

izations are very different in terms of their functions, organizational models and available resources. The roles between different actors in the regions are also unclear, which makes the division of roles confusing from the companies' perspective.

Differences within and between the regions challenge Visit Finland's operating model based on four "Greater Areas". Visit Finland's regional cooperation is organised around four regions, called "the Greater Areas" (Helsinki capital region, Lapland, Lakeland and the Archipelago). This regional division is made primarily for branding purposes, but it also serves as a basis for cooperation. However, the differences in the maturity level of tourism in the four regions are large. In addition, each of the four regions consists of a number of provincial, sub-regional or municipal organizations, each with its own objectives, tasks and budgeted resources. The problem is not only the differences between the regions but also the differences within them. Co-operation with each region must be done differently. This challenges the whole idea of the Greater Areas: Four large regions can serve as a platform for international branding, but otherwise the regions are too diverse internally.

2.3 RESOURCES AND FUNDING

A clear division of responsibilities between levels of government along with adequate and stable resources are essential to enable the National Tourism Organization to plan strategically and maintain a continuous and effective presence in the priority markets.

VISIT SWEDEN AB	INNOVATION NORWAY / VISIT NORWAY	BUSINESS ICELAND / VISIT ICELAND	VISIT FINLAND
The central allocation for Visit Sweden is approx. EUR 10.3 million (SEK 105 million) per year. The budget at Tillväxtverket for tourism statistics and development is approx. EUR 2.4 million (SEK 25 million). In 2020, the total funding of Visit Sweden was approx. EUR 15.9 million, of which state funding accounted for approx. EUR 13.9 million.	In 2020, Innovation Norway received approx. EUR 17.1 million (NOK178million) of state funding for its role as National Tourism Organization. In addition to these earmarked funds, Norwegian tourism companies received approx. EUR 31.2 million (NOK 315 million) in 2018 from various funding sources in Innovation Norway to develop their activity.	In 2020, the total funding and state funding of Visit Iceland was approx. EUR 7.4 million.	In 2020, the total state funding of Visit Finland was EUR 14.5 million. In addition, Visit Finland received EUR 0.9 million of private funding.

Visit Finland's funding is largely on par with its relevant reference organizations. Visit Finland is funded from the State budget. In 2018–19, the budget was increased to EUR 16 million (from EUR 11.9 million in 2017) in order to deliver the Tourism 4.0 Action Program. The amount of funding provided by public sources varies from year to year. In 2018, tourism-related projects received around EUR 25 million from Finland's Structural Funds Program 2014–20 and EUR 12.3 million from the Rural Development Program for Mainland Finland 2014–20. Support for tourism is also provided, directly or indirectly, through the budgets and activities of other ministries, development agencies and the various regional bodies identified above.

The central allocation for *Visit Sweden* is EUR 10.3 million per year. Related government programs can also contribute further funds. The budget at Tillväxtverket for tourism statistics and development totals around EUR 2.5 million. In 2020, the total funding of Visit Sweden was approximately EUR 15.9 million, of which state funding accounted for approximately EUR 13.9 million.

In 2020, *Innovation Norway* received approximately EUR 17.1 million of state funding for its role as National Tourism Organization. In addition to these earmarked funds, Norwegian tourism companies received approximately EUR 31.2 million in 2018 from various funding sources in Innovation Norway to develop their activity.

3 EFFICIENCY AND EFFECTIVENESS

The focus of government interventions should be on those areas where markets fail to deliver the necessary services or outcomes. To be efficient and effective, all activities should be market-oriented and target-oriented. This chapter examines the activities of Visit Finland relative to these principles.

MAIN FINDINGS

- Visit Finland's importance for the tourism industy is widely recognised within the industry. However, Visit Finland's impact is primarily considered to be indirect. Visit Finland's activities support the whole industry rather than individual businesses.
- The greatest impact to businesses is created through Visit Finland's networks and contacts with international markets.
- Visit Finland's target markets correspond well with the needs of the businesses and the market potential of different markets; however, the fact that the Nordic countries and the Baltic countries have not been included in them has been seen as a deficiency.
- The Regional Tourism Organizations are in general very satisfied with the support they receive from Visit Finland, but they wish better predictability and earlier communication of planned activities.
- There is not a lot of evidence available of the programs' results and impacts. According to some stakeholders, the growth programs improved the business orientation of Visit Finland's activities. The umbrella programs have been relatively loose 'thematic focus areas' rather than programs with a coordinated group of related projects combined to achieve specific results and outcomes.
- There is no systematic assessment of promotional activities or marketing campaigns and therefore there is no evidence of the impact of these activities. Only by monitoring individual campaigns can evidence be obtained for evaluation of promotional work.

Visit Finland works to develop Finland's travel image and helps Finnish travel companies to become more international and develop, sell and market high-quality travel products. Visit Finland cooperates with travel destination regions, businesses in the travel industry and other export promoters as well as embassies. Visit Finland has a staff of 60 people.

From the efficiency and effectiveness perspective, the key evaluation questions are:

- How well do the policy and strategic level priorities correspond to the needs and challenges of the industry?
- To what extent are activities targeted to markets with the greatest potential for passenger flow and travel income?
- How well do the services reflect the needs of businesses, destinations and Regional Tourism Organizations?
- How beneficial are the services to businesses, destinations and Regional Tourism Organizations?
- What is the estimated increase in the number of visits and related expenditure as generated by the marketing activities?

3.1 GOALS AND FORMS OF ACTIVITIES

Visit Finland's main responsibility is to promote Finland as a tourist destination. This includes, among other things, selecting international markets and bundling the resources for a presence in foreign markets and transferring knowledge on consumer trends and in foreign markets. Visit Finland and the tourism industry conduct joint product campaigns and arrange familiarisation trips for foreign tour operators and the media in order to support the promotion of Finland as an attractive destination. Visit Finland acquires market information for the industry and promotes business development.

Before 2020 and pandemic, Visit Finland's target markets were diveded into three categories: Focus Markets (Germany, the UK, China and Japan), Stable Growth Markets (Russia, Benelux, Switzerland, France, Italy, Spain, the USA and South Korea) and Fast Growing & New Markets (UAE and India). Visit Finland has representatives in these markets. The market representatives are responsible for promoting sales activities, following the markets and their development as well as gathering market data for further analysis.

The main target group of Finland consists of people who have travelled a lot and are seeking new, fresh alternatives. Instead of pleasing everyone, Visit Finland is targeting the marketing activities to people whose set of values matches travelling to Finland. They appreciate the quality of life, pure nature and responsibility. Based on a study conducted in 2017, VF identified six main segments of travelers who are interested in visiting Finland. These segments are: Nature Wonder Hunters, Nature Explorers, Activity Enthusiasts, Comfort Seekers, City Breakers and Authentic Lifestyle Seekers.

Sustainability and digitalisation are recognised trends affecting inbound tourism. There is also increasing international interest in some of Finland's key strengths: nature, security, cleanliness and authenticity. A major challenge faced by tourism in Finland is its price competitiveness, with high taxes and labour costs as contributing factors. Other challenges include seasonality, difficulties in finding skilled workers, connectivity issues and relatively few travel businesses to support tourism growth. (Source: Visit Finland and OECD Tourism Trends Report.)

Finland aims to double its tourism exports and be the most sustainably growing in the Nordic region. Under the new Tourism Strategy 2019–28 and Action Plan 2019–23, Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism, Finland aims to double its tourism exports and be the most sustainably growing destination in the Nordic region. The strategy identifies four key priorities to promote growth and renewal in the sector: support activities that foster sustainable development, respond to digital change, improve accessibility and ensure an operating environment that supports competitiveness. Co-operation with relevant stakeholders also plays a major role.

3.2 PROMOTION OF FINLAND AS A TOURIST DESTINATION

Visit Finland's primary responsibility is to promote Finland as a tourist destination. From the perspective of evaluation, the question is about the contribution of Visit Finland's activities to Finland's country image as a tourist destination. To put it more precisely: What is the share of visits and expenditure that would not have been realised without Visit Finland? The question is about additionality.

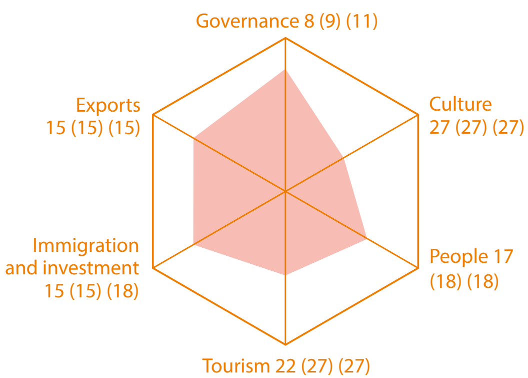
Country image is monitored by The Anholt-GfK Roper Nation Brands Index (NBI). NBI is considered to be the world's most comprehensive country brand survey. The Finland Promotion Board orders NBI at three-year intervals. Each year the NBI measures country brands on the basis of six dimensions: exports, social policy and governance, culture, people, tourism and immigration/

investment. The resulting surveys contain a ranking list of countries and an explanatory section. The NBI is compiled by interviewing more than 20,000 people in 20 countries, focusing on their perceptions of 50 countries in all.

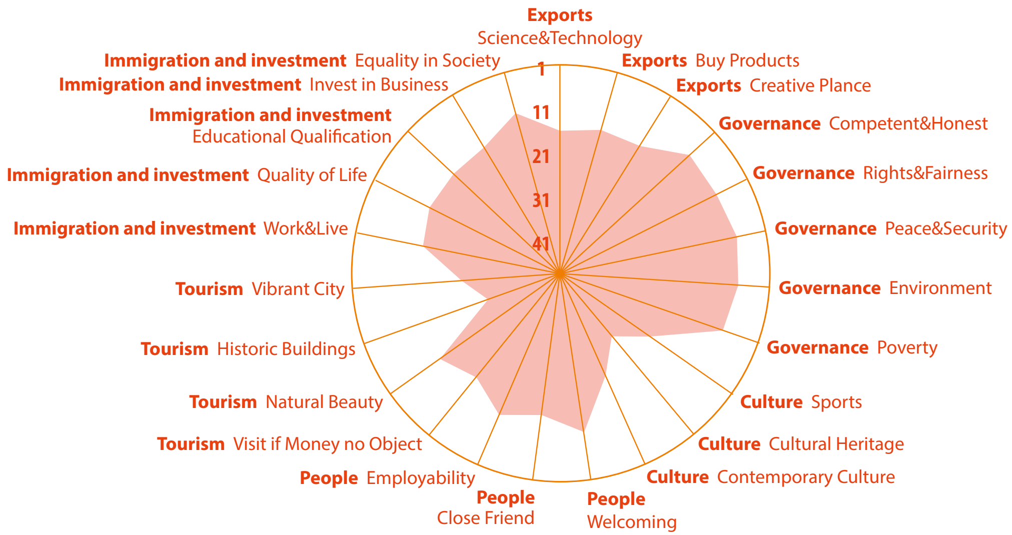
Finland has a mediocre country image in tourism. Finland's overall ranking is 17th in the latest research report, and our position has remained similar for many years. In tourism, our ranking is below the overall level of Finland's country brand (22th). Finnish culture is also not highly rated, according to the survey. Despite investments in cultural exports, Finland has not risen above mediocrity at the global level, and Finland has remained in the same position in the rankings, 27th, since 2008. Finland tends to lag behind on 'soft' indicators, such as dynamism, vibrancy and the degree of interest in our culture (in the broad sense), which are clearly weaker than other dimensions. In addition, Finland doesn't excel at sports, in the experiences offered by cities or in our cultural heritage – all aspects highly relevant to tourism.

FIGURE 4. Finland's NBI rankings. Source: NBI 2016

NBI rankings for different dimensions, 2016 (2013) (2008)



Finland's NBI rankings in 2016 for different dimensions



Finland doesn't stand out from its Nordic competitors. The uniqueness and international significance of a country's resources are important factors in determining its tourism potential. According to a Brand Tracking survey commissioned by Visit Finland, many positive things are associated with Finland. One of the greatest challenges, however, is that Finland doesn't stand out much from its Nordic competitors. In comparison with the other Nordic countries, Finland is the market leader for the winter season in markets including Russia, the United Kingdom, France, Japan, China and Switzerland. Finland's winter has been highly commodified, and the impact of this work is reflected in the record growth figures for the 2016–2017 winter season. In recent years, overnight stays during the winter season have accounted for between 43 and 47 per cent of all overnight stays by foreigners in Finland.

There is no systematic assessment of promotional activities or marketing campaigns and therefore there is no evidence of the impact of these activities. Visit Finland systematically collects and analyses a multitude of different metrics: flows of visitors, origins and destinations, durations of a trip, types of accommodation etc. However, none of the followed metrics is answering to the question of additionality. Assessment of the impacts of promotional campaigns is a central element of country branding and any professional marketing activity. Evidence for the evaluation of promotional work can be

BOX 3 ASSESSING THE IMPACT OF PROMOTIONAL ACTIVITIES

In Visit Denmark, all projects and programs follow a project model which dictates evaluation using assessment of result goals (defining the specific deliverables) and effect goals (defining the specific criteria for success). All marketing activities are evaluated based on how well the result goals and the effect goals are met.

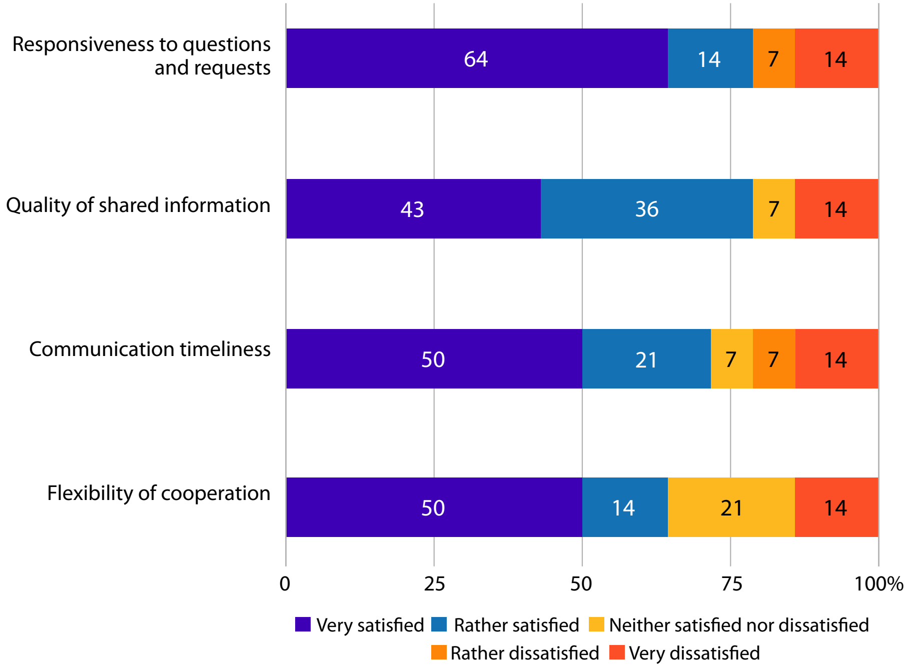
The main purpose of the evaluation is to ensure that the effects of significant and major marketing projects are documented and evaluated and that the effects of minor projects are estimated. Project managers within the organization must, as a minimum, set targets according to the performance indicators.

Setting goals is an integral part of all marketing activity. The targets in each project are co-ordinated with and approved by the external partners in the project. The scope of the measurement is defined by the budget size and the resources allocated to the activity.

In order to be able to compare the results measured to other tourism marketing activities, Visit Denmark uses benchmark conversion rates from the international media agency International Universal Media. In combination with previous internal evaluations, it gives an indication of how well the marketing activity performed.

provided only through monitoring of campaigns, and the evaluation findings will only be as reliable and representative as the evidence on which the evaluation is based. Impact assessment of promotional activities is necessarily campaign based: it is the only possible method for evaluating the success of the alternative measures and the additionality of the promotional work.

FIGURE 5. How satisfied are you with the following aspects of cooperation?



Visit Finland's marketing partners in the target markets are in general very satisfied with the cooperation with Visit Finland. The satisfaction with cooperation with Visit Finland is generally good but varies among the marketing partners in different target markets. Overall, 43% of the respondents were really satisfied with the cooperation, but at the same time 21% were really dissatisfied. The respondents were most satisfied with Visit Finland's responsiveness to questions and requests. The respondents also saw that the quality of shared information is high. The flexibility of cooperation aroused most dissatisfaction.

Visit Finland's services are seen as relevant and of high quality among international marketing partners. 43% of the stakeholders saw that the services were relevant to them, and 57% of them saw that the quality of Visit Finland's services is really high. 36% of the respondents saw that the service had been good also during the corona pandemic.

3.3 IMPACT OF VISIT FINLAND'S SERVICES TO BUSINESSES

Visit Finland's importance for the tourism industy is widely recognised within the industry. However, Visit Finland's impact is primarily considered to be indirect: Visit Finland's activities support the whole industry rather than individual businesses. In the tourism industry survey, the bulk of the respondents saw that Visit Finland has more impact to the whole industry than it has for the respondents themselves. Bigger companies and those companies for whom inbound tourism accounts for a larger share of their revenue see Visit Finland's services as more beneficiary (as was expected). A difference could be seen in the impact, both in regard of the whole industry and the respondent's company.

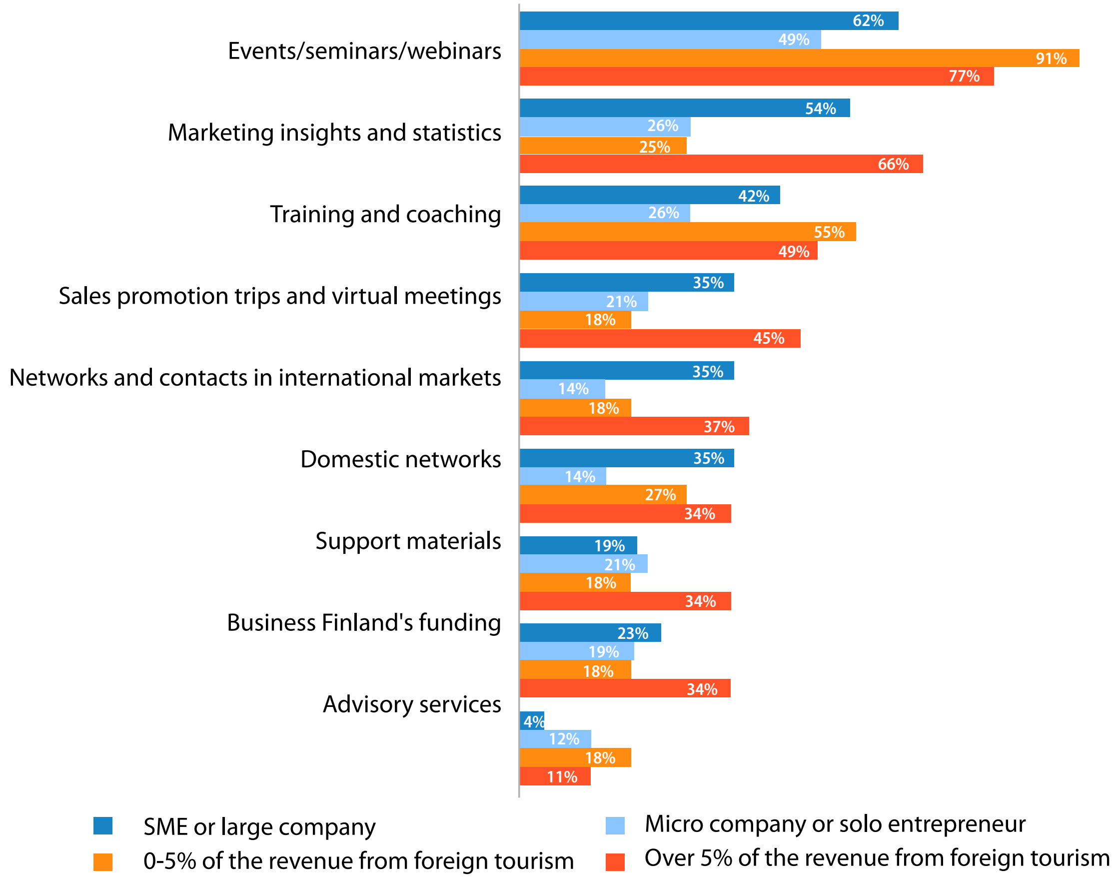
Those companies for whom international travel accounted for 0–5% of their turnover saw Visit Finland's services in general as slightly more important than those companies for whom international travel accounted for more than 5% of their revenue. A difference could be seen especially in regard of the networks whose aim is to boost collaboration nationally. A difference could also be seen in regard of the funding from Business Finland.

SMEs and larger companies saw Visit Finland's services in general as slightly more important than micro companies and solo entrepreneurs did. SMBs and larger companies see the international networks and sales promotion trips as more important than micro companies and solo entrepreneurs do.

Visit Finland and its services are well known among tourism businesses. The impact of the services depends on their use. Only those services that are utilised by businesses may have an impact. The events/seminars/webinars and marketing insights/statistics are the most used ones of Visit Finland's services. 79% of the respondents had participated in seminars or webinars and 55% had utilised marketing insights or statistics produced by Visit Finland. The least used services were the advisory services, which only 13% of the respondents had made use of over the past five years. The respondents for whom inbound tourism accounted for 0–5% of their turnover generally utilised Visit Finland's services to a lesser extent than other respondents. Micro and solo businesses also used Visit Finland's services less than others in general. Only advisory services were used more often by micro and solo businesses than by larger companies.

The greatest impact to businesses is created through Visit Finland's networks and contacts with international markets. 68% of the respondents in the industry survey responded that the networks and contacts with international markets are at least somewhat important. The events, seminars and webinars were seen as the second most important service, and 64% of the respondents saw them as at least somewhat important. All the services provided by Visit Finland were seen as important.

FIGURE 6. “Which of the following services have you used in the last 5 years?”



The advisory services were seen as the least important, even though 45% saw them as at least somewhat important.

Development of digital marketing and digital capabilities is seen as the most important focus area in the future development of the tourism industry. The respondents were asked to estimate the importance of different themes and their importance in developing their businesses. All of the themes were seen as important, and more than half of the respondents saw every theme as at least somewhat important. The theme that divided the respondents the most was the support for product development. Those companies for whom international travel accounts for more than 5% of their revenue felt that these themes were in general more important than did the respondents for whom international travel accounts for 0–5% of their revenue. Micro companies and solo entrepreneurs considered the themes less important than larger companies did. The difference was particularly visible as regards the support of product development funding, which was perceived as more important by larger companies and those companies for whom inbound tourism accounts for a larger share of their revenue.

FIGURE 7. Importance of selected services based on the size of the company and the importance of international tourism.

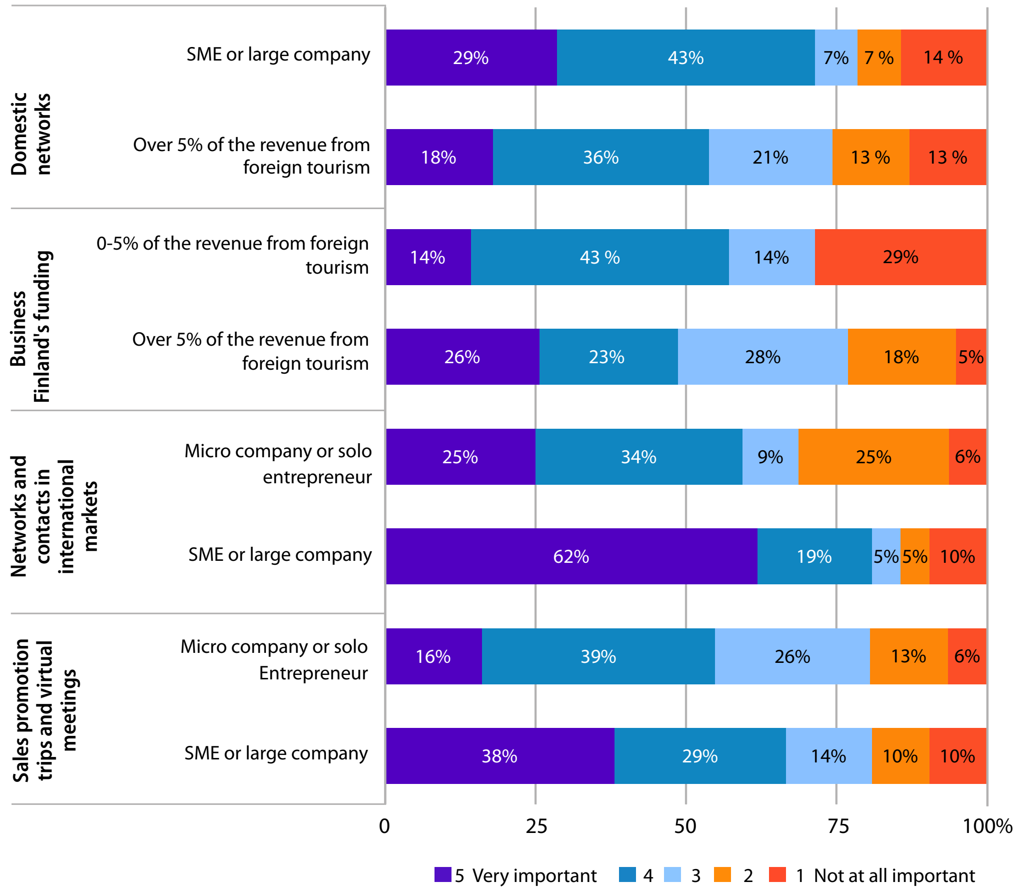
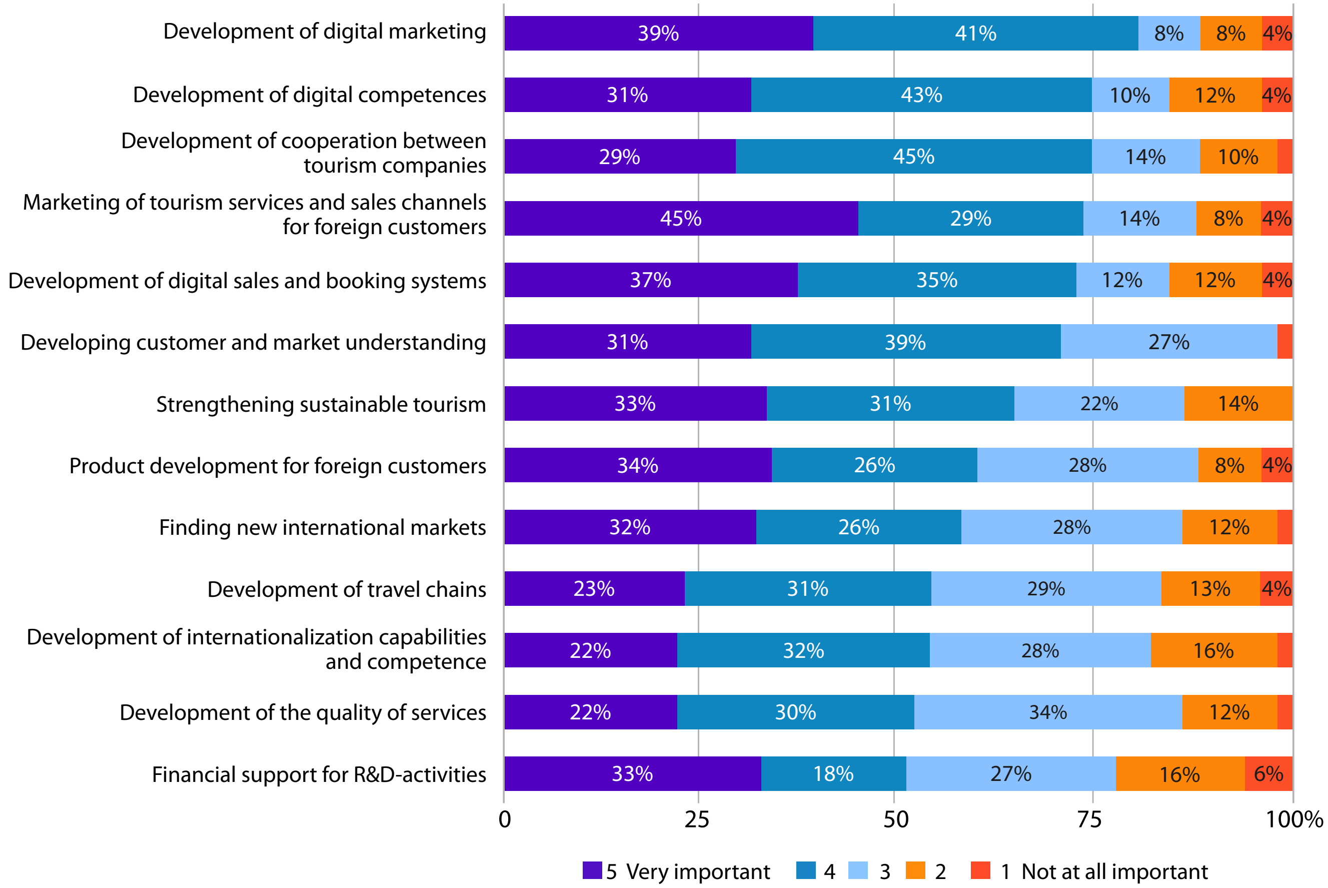


FIGURE 8. “Evaluate the importance of the following themes from the perspective of developing your own business.”



BOX 4 FACILITATING DIGITAL TRANSFORMATION OF TOURISM SECTOR

As digitalisation evolves, emerging technologies are combining in novel ways to push the digital transformation in new directions. In tourism, this convergence is happening in two key areas: the coming together of digital technologies and digital technologies merging with the physical world. Digital-physical convergence is demonstrated by augmented reality, wearable technologies, and the Internet-of-Things to generate new hybrid products, services and experiences.

The uptake of digital technologies at the operational level and the adoption of digital business strategies have been uneven, and the gap between innovative digital companies and traditional tourism SMEs with low levels of digitalisation is growing. In addition, policy initiatives that support innovation are often not sufficiently targeted to deal with the particular barriers, opportunities and operational characteristics of tourism SMEs.

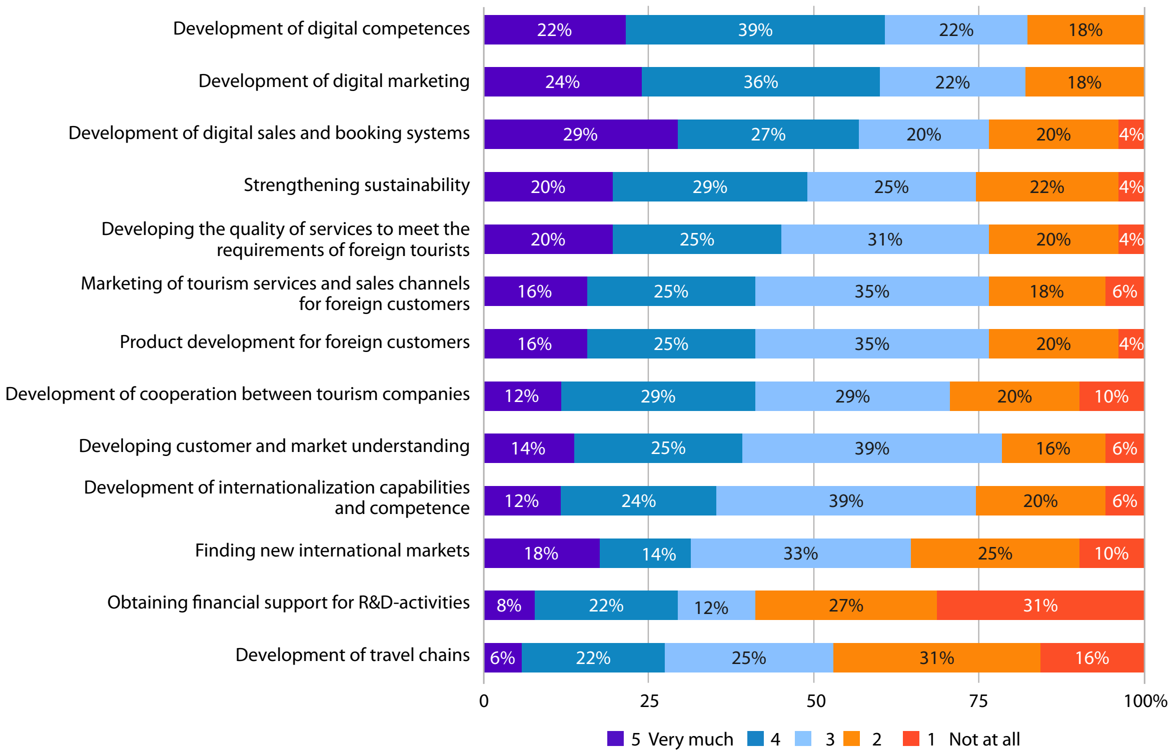
In Denmark, TourismX was launched in 2018, with the purpose of strengthening innovation in Danish tourism enterprises. The project links tourism business growth ideas with the latest research and knowledge in order to develop new innovative products and services within the tourism industry. The project is being implemented in a partnership between national tourism development organizations and universities.

In Iceland, The Icelandic Tourist Board has created a Test Lab, Sandkassinn, in order to match tourism companies with tech companies and thereby lower the barriers between these two players.

Companies have been investing in the development of digital marketing and capabilities and digital sales and reservation platforms over the past five years. More than half of the respondents had invested in digitalisation. The least invested themes were fundraising for product development and the development of travel chains.

Visit Finland's target markets correspond well with the needs of the businesses and the market potential of different markets; however, the fact that the Nordic countries and the Baltic countries have not been includ-

FIGURE 9. “In the last 5 years, how much have you invested in the following themes in your company?”



ed in them has been seen as a deficiency. In the latest revision of the target markets (2021), also Sweden was included, so this criticism is no longer valid in this respect. According to the respondents, the biggest inflows of international travellers in 2019 came from the Nordic region, Germany and German-speaking Europe and Russia. The respondents were also asked to choose the countries where they would like to target their marketing. The number one target was Germany and German-speaking Europe, while Great-Britain and the Baltic countries came second and third, respectively.

Business Finland’s funding for the travel industry has been relatively small. Business Finland finances business research and development projects and public research projects. Over the past ten years, the total amount of funding per annum has been EUR 500–600 million (not taking into account Covid-19 related funding in 2020). Business Finland’s funding criteria do not apply well to most travel businesses. Their business is mostly small and local without significant scaling potential. In all, Business Finland has provided a few million euros of funding for the travel industry per year.

FIGURE 10. Business Finland's funding for the travel industry (not taking into account Covid-19 related funding in 2020).

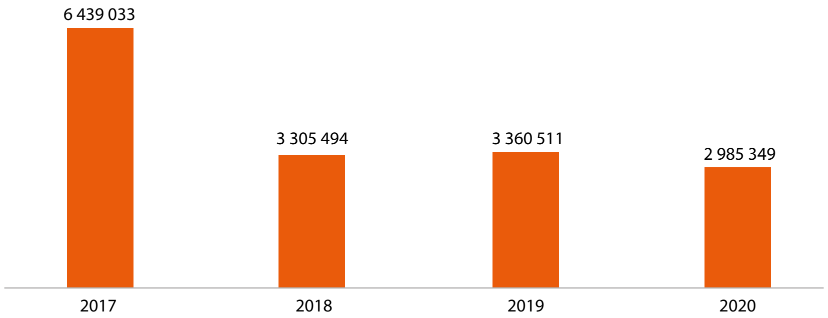


FIGURE 11. Number of positive financing decisions by industry (not taking into account Covid-19 related funding in 2020).

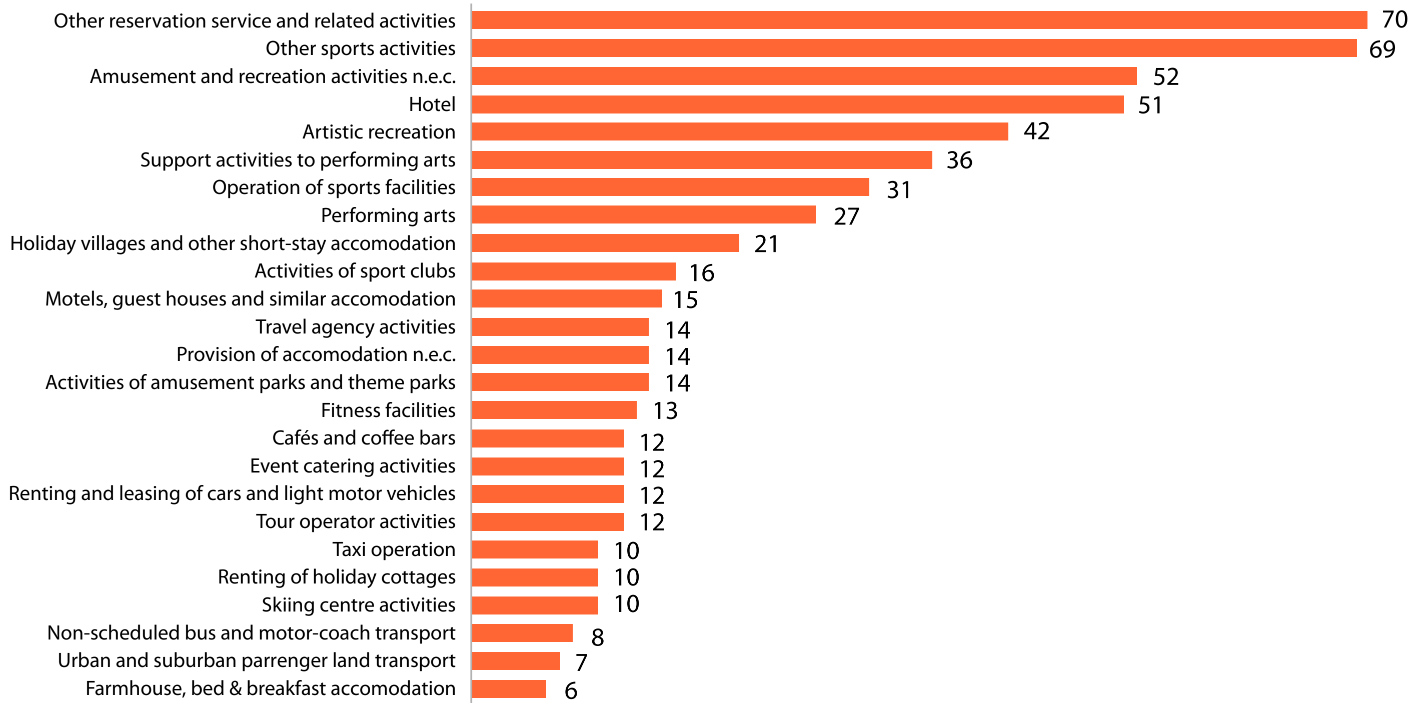
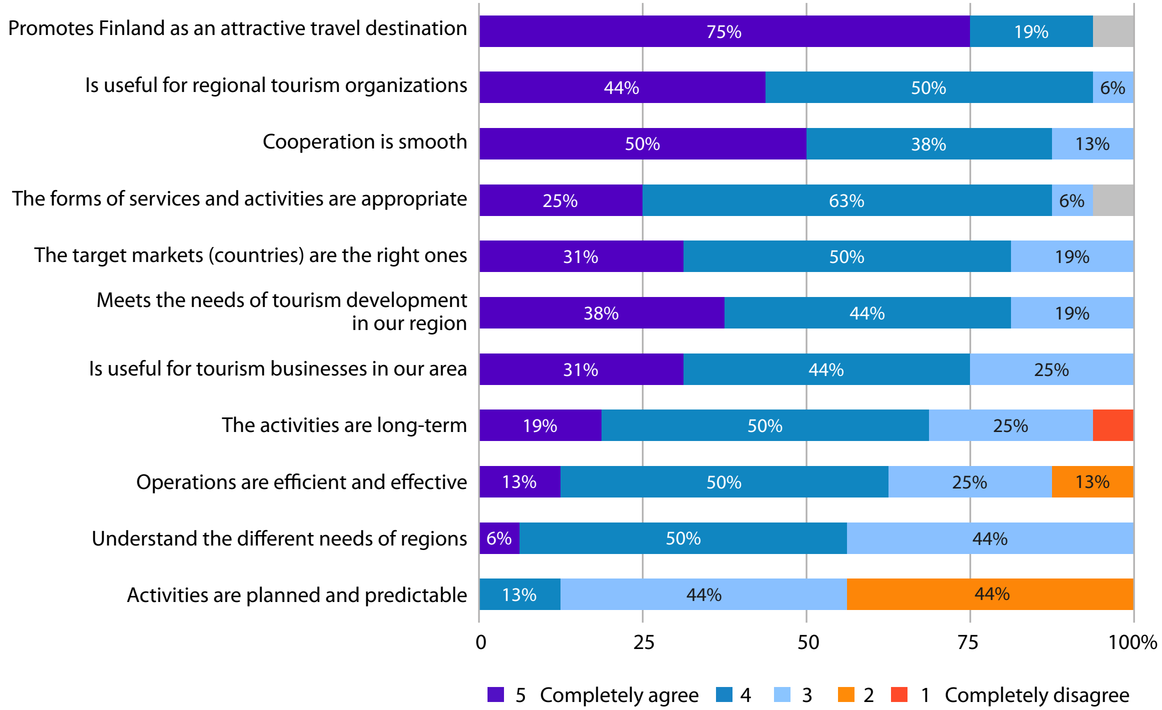


FIGURE 12. “Evaluate the following statements about Visit Finland.”

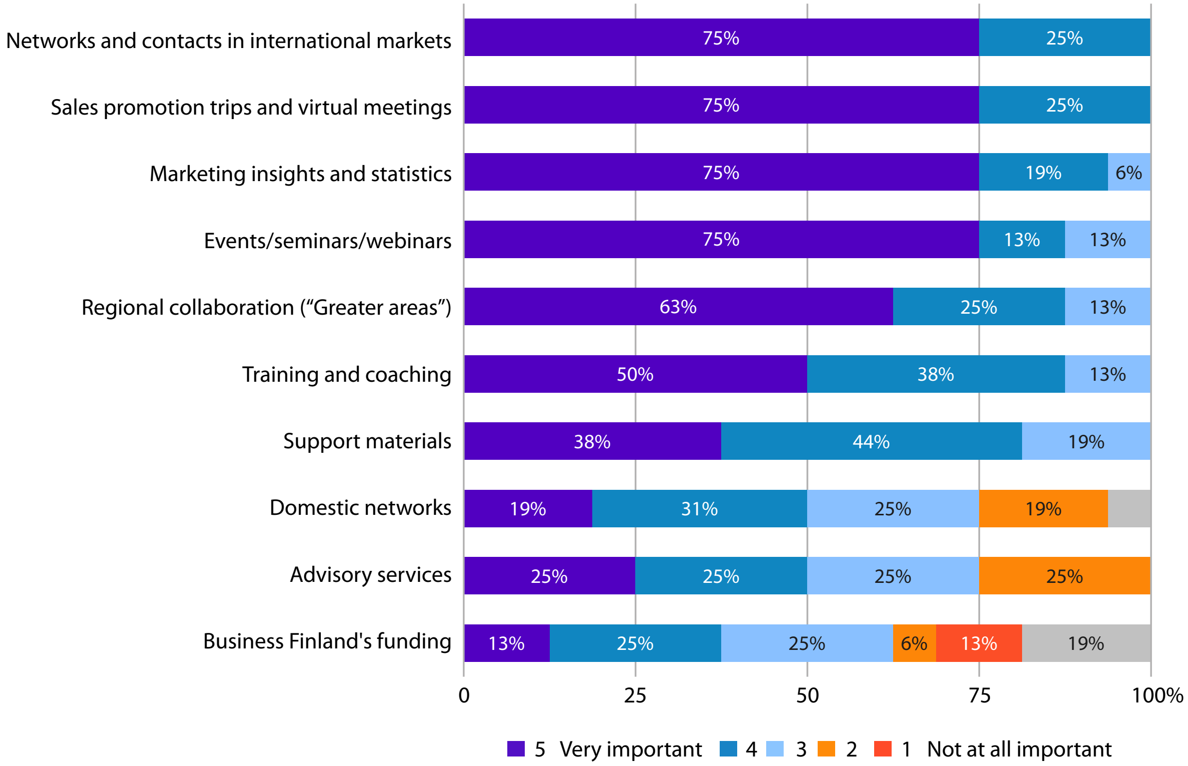


3.4 IMPACT OF VISIT FINLAND’S SERVICES TO REGIONAL ORGANIZATIONS

Visit Finland’s contribution to the work of Regional Tourism Organizations is significant. 89% of the respondents see Visit Finland’s work as important or very important for their own work. The Regional Tourism Organizations give credit to Visit Finland especially for its staff who they describe as highly skilled professionals who are easy to communicate with. They also perceive Visit Finland’s marketing efforts and country promotion efforts as important.

The Regional Tourism Organizations are in general very satisfied with the support they receive from Visit Finland, but they wish better predictability and earlier communication of planned activities. The Regional Tourism Organizations wish that Visit Finland’s actions would be planned and communicated more in advance. This would help them plan and budget their own work. Currently the problem is that the regional organizations’ budgets are already fixed by the time Visit Finland communicates its own plans.

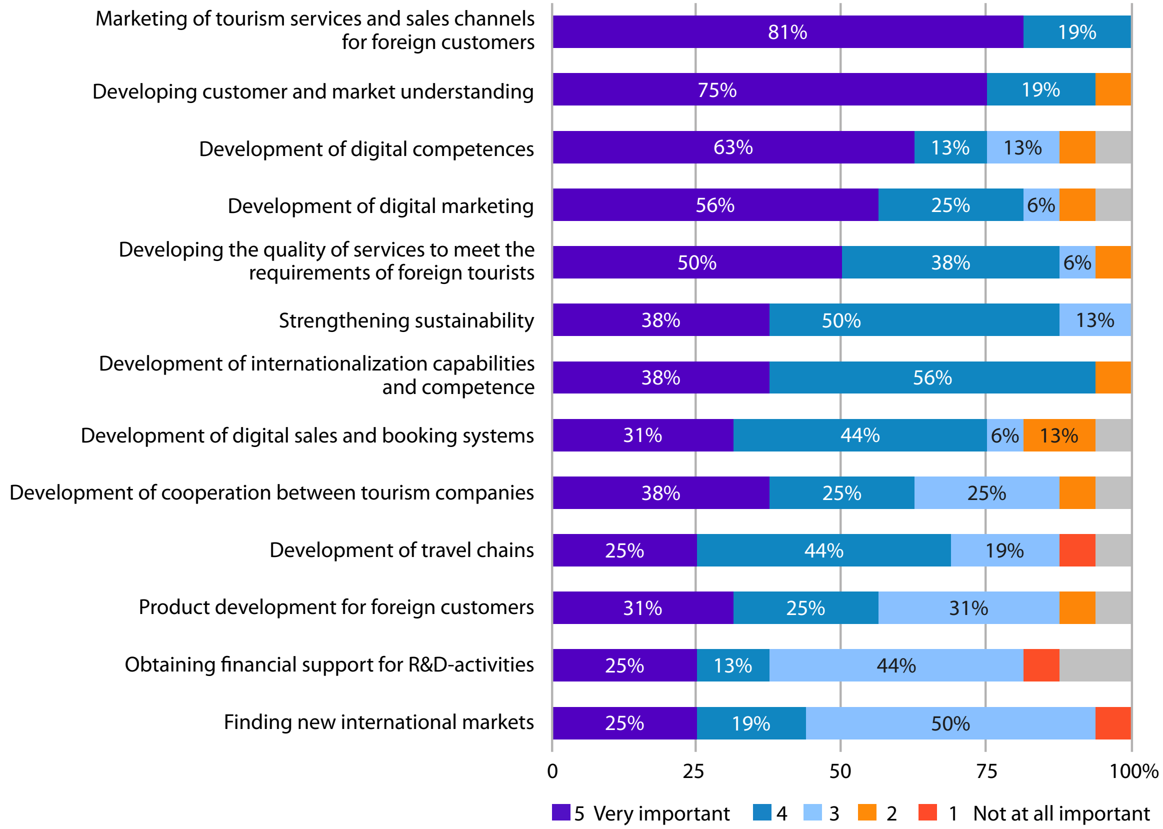
FIGURE 13. “Evaluate the importance of the following Visit Finland’s activities from the perspective of promoting tourism in your region.”



The sales and marketing activities and networks and contacts with international markets are considered as the most important aspects of Visit Finland’s work. The regional organizations were asked to estimate the importance of different aspects of Visit Finland’s work for their own work. Besides the sales and marketing to international clients and networks and Visit Finland’s contacts with international markets, also the marketing insight, research and statistics, events and seminars, collaboration with embassies, training and coaching and support materials for own work were seen as important. Roughly half of the regional organizations saw other national networks, advisory service and Business Finland’s funding as important, but in general these three aspects were seen as less important for the regional organizations than for others.

There is a lot of variation in how satisfied the respondents are with the collaboration within the Greater Areas. In the survey, 56% of the Regional Tourism Organizations see that the collaboration within the Greater Areas works really well. There has also been collaboration between the Greater Areas, but only 6% of the respondents saw that this collaboration has worked really well. On the other hand, none of the respondents saw that the collaboration had not worked at all. Over a third of the respondents saw that the roles and responsibilities are clear between the different actors within their greater region.

FIGURE 14. “Evaluate the importance of the following themes from the perspective of your own region.”



Visit Finland faces a lot of non-compatible expectations from different regions and stakeholders. Some regions and stakeholders are more concerned about the cost-effectiveness of Visit Finland’s activities and call for more specific strategic focus, while others emphasize regional equality and call for more equal treatment of different areas. Currently Visit Finland is balancing between these opposite expectations without clear strategic choice between the two (cost-effectiveness vs. equality of regions and destinations).

BOX 5 ENSURING THE SUSTAINABILITY OF TOURISM – Case Iceland

The sustainable development of tourism is one of the key issues of tourism policy not only in Finland, but globally. In an effect to tackle social, cultural, economic, and environmental challenges, policy makers around the world are taking steps to better understand the impacts of tourism on destinations and host communities, determine their relevant carrying capacity, and assess the sustainability of the sector more broadly.

In Iceland, as a response to exceptional tourism growth between 2010 and 2017, the Minister of Tourism, Industry and Innovation developed a Tourism Impact Assessment (TIA) tool to attempt to assess the carrying capacity of Iceland as a tourist destination.

The Tourism Impact Assessment tool was developed by the Tourism Task Force, in collaboration with various expert advisors. The task was to measure the capacity of key elements of infrastructure that tourists move through during their trip. Based on available data, these elements were assessed, and thresholds established to determine whether tolerance limits have been reached or were likely to be reached in the foreseeable future according to growth scenarios until 2030. An assessment was then made of how flexible and capital-intensive the elements were for improvement.

Preliminary results indicate that several components have already reached or are approaching their tolerance limits. The Tourism Impact Assessment will, together with a new Tourism Policy Framework for 2020-30, guide work on a new action-oriented tourism strategy. It will also serve as a tool for future decision-making regarding infrastructure investment and policy revision. The results will be regularly reassessed and updated as data sets improve. The data-centred approach of the Impact Assessment is considered an important first step in developing a holistic management system for tourism.

3.5 IMPACT OF PROGRAMS

The significance of the programs in Visit Finland's activities is limited compared to other Business Finland's operational units. Therefore, the weight of the programs was also lower in this evaluation.

Between 2015–2020, Visit Finland carried out two types of programs: "Growth programs" and theme-based "Umbrella programs". The growth programs FinRelax, Finnish Archipelago and StopOver Finland incorporated various development, sales and marketing activities in 2015–2018. The aim of the programs was to increase the number of overnights from the target countries and to increase the turnover of the participating partners. The goals of the umbrella programs, Culture Finland and Outdoor Finland, were to direct and coordinate development work in different parts of Finland, improve company networking, ensure sufficient quality and exportability of the products under different themes and enhance theme-based marketing.

There is not a lot of evidence available of the programs' results and impacts. Only the Culture Finland program has been evaluated separately. The growth programs have been evaluated as part of a larger evaluation of all growth programs, but there is no data for the results and impacts specific to Visit Finland's growth programs (Evaluation of Team Finland growth programmes, Publications of the Govenrment´s analysis, assessment and research activities 40/2016). In this evaluation, extensive analysis on achievement of impact goals of programs is has not been done as baseline and monitoring data related to the goals was imperfect or non-existent (fig. 15) and there was not much secondary data to support the work, either.

The umbrella programs have been more 'thematic focus areas' than programs with a coordinated group of related projects combined to achieve specific results and outcomes. The program plans are very general in nature and they only outline the objectives, measures and timetable. The plans do not clearly indicate how resources will be distributed between the different measures and objectives. Reporting is focused mostly on activities. In the evaluation of the Culture Finland program, the nature of the "Umbrella program" was described as follows:

> *"No quantitative or qualitative target levels have been set for the Culture Finland umbrella program at the impact or result level. Therefore, it is not possible to assess the short- and long-term changes contributed by the umbrella program. The reporting of the umbrella program is minimal, and the measurement of targets is mainly reflected in the number of transactions at the output level.*
>
> *However, no target levels have been set for these indicators either, which makes it impossible to review the achievement of targets in the light of the indica-*

FIGURE 15. Impact of Growth Programs.

IMPACT GOALS	STATUS
FinRelax	
Increase in the number of tourists interested in wellness products.	No information available: no baseline measurement nor monitoring of development. Evaluation would need both the baseline measurement and follow-up measurement with the same methodology.
Increase in the number of tour operators interested in wellness products.	No information available: no baseline measurement nor monitoring of development. (66 in 2016 according to Program's Final Report.)
Increase in sales of welfare products.	No information available: no baseline measurement nor monitoring of development. Evaluation would need both the baseline measurement and follow-up measurement with the same methodology.
Finnish Archipelago	
Strengthen the brand that sets the Finnish archipelago apart from its competitors.	No information available: no baseline measurement nor monitoring of development. Evaluation would need both the baseline measurement and follow-up measurement with the same methodology.
Products for sale in the selections of tour operators in selected destination countries.	No information available: no baseline measurement nor monitoring of development.
Increase of the number of overnight stays by foreign tourists.	Decreased significantly due Covid-19
Revenue growth in the long run as the number of tourists increases.	Decreased significantly due Covid-19
StopOver	
Growth in overnight stays from Asia	Decreased significantly due Covid-19
Increase of tourism income from Asia	Decreased significantly due Covid-19

tors used. It may also be difficult to pinpoint the link between the measures taken to achieve the broad objectives set for the umbrella program.

The goals are in many respects aimed at adding, developing or supporting things within the chosen themes. Given the nature of the umbrella program, such actions are typical, but the objectives and the indicators describing their realisation need to be focused and defined more precisely, linked to the success and quality of the activities and assigned with concrete target levels. In addition, the relationship between project measures and objectives should be determined by a clear logic of measures already at the project planning stage. This would support the internal logic of the project as well as strengthen targeting and ensure that the objectives of the umbrella program are in line with the resources."

This description captures well the nature of the umbrella programs and it holds to large extent for all of them.

The growth programs improved the business orientation of Visit Finland's activities. Several stakeholders saw that Visit Finland's business orientation had improved after it became part of Finpro and later Business Finland. The growth programs were seen as an important step in that progress. This has been considered as an important side-effect of the growth programs. The direct impacts are largely unknown and can be based primarily on the evaluation of Team Finland growth programs in 2016 that analysed Export Finland growth programs based on a survey and on the interviews of people from ministries, agencies and other interest groups. The findings of the evaluation suggest that the growth programs were a functional and welcome tool for improving the internationalisation of SMEs. At the same time, the evaluation noted that it is too early to draw conclusions about the long-term effects of the programs. However, the findings obtained suggested that some of the results are promising and the short-term effects of the programs are mostly positive. The evaluation noted that the programs at best provided wider visibility, information about the target market needs, access to the "right tables" and improved information exchange. However, the evaluation also indicates that there are large program-specific differences, and there remains a lot of variation in the feedback obtained from the firms.

Beneficiality of the programs yields mixed responses from different stakeholders. In the tourism industry survey, 1 out of 4 respondents considered Visit Finland's programs as beneficial. About half of the respondents (47%) had participated at least in one of the evaluated programs. In the Regional Tourism Organizations, the respondents saw that the programs failed to meet the organizations' needs beyond mediocrity. The programs have created new types of partnerships and collaboration over regions and new networks both in Finland and abroad. However, many respondents felt that the programs have failed to achieve their goals. According to some respondents, the programs should involve companies more closely. At the moment, from the businesses' point of view, the programs lack a clear incentive or reasoning regarding the positive affects of participation in them. Respondents also see that the programs should have a longer perspective and that they should be integrated more strongly in Visit Finland's everyday work.

4 RECOVERY FROM THE PANDEMIC

The coronavirus outbreak has severely affected the business world and the tourism sector in particular. This chapter takes a look at the measures taken by the Finnish government and Visit Finland/Business Finland to help the recovery of the tourism industry.

Tourism is one of the sectors most severely affected by the coronavirus. For example, in June 2020, overnight stays by foreign visitors declined by 93 per cent. A total of 44,000 overnight stays were recorded for non-resident visitors. Finnish accommodation establishments recorded a total of 1.09 million overnight stays, which was 52.3 per cent lower than one year before.

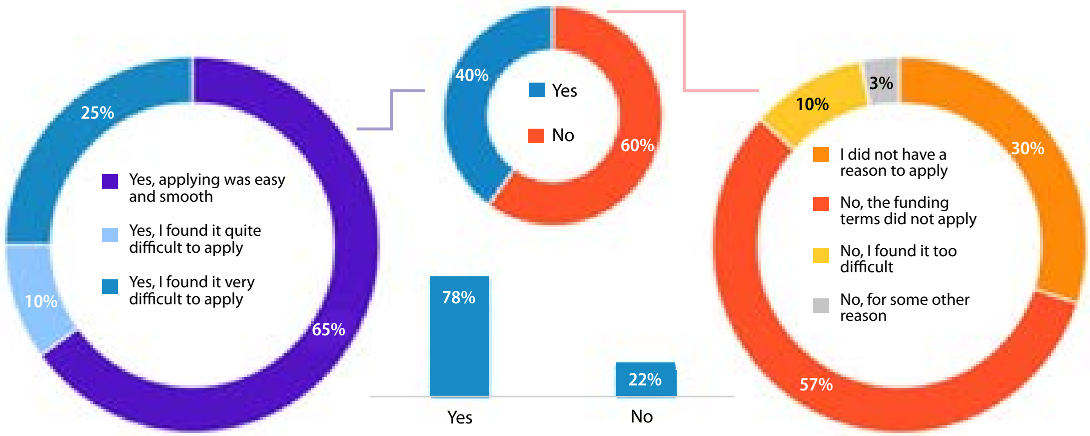
Several financial support measures were implemented to help the tourism industry and other businesses. In March 2020, the Finnish government decided to allocate EUR 1 billion for direct business subsidies. Of this amount, EUR 700 million was intended for grants provided by Business Finland and EUR 300 million for grants provided by Centres for Economic Development, Transport and the Environment. In June 2020, the government decided on additional funding of EUR 4 million to support the regions' opportunities to develop tourism, strengthen the management and coordination of tourism development and improve cooperation. In addition, the government allocated EUR 0.5 million to a campaign to promote domestic tourism.

Business Finland launched two new financial services owing to the coronavirus outbreak. They were intended for SMEs in Finland that employ 6–250 people and for midcaps that may employ more than 250 people but have an annual turnover of less than EUR 300 million.

A majority of the companies did not apply for Business Finland funding related to the corona crisis in spring 2020. In the survey, 40% of the respondents told, that they had applied for funding. Out of those who had applied, 78% had received funding. 65% of those companies that had applied felt that the application process itself was easy and proficient. 35% of those who had applied had experienced at least some sort of difficulties in the application process. 57% of those who had not applied reported that they did not meet the terms of the funding, while 30% felt that they did not need the funding. 13% felt that applying would be too difficult or had some other reason for not applying.

Those companies for whom international travel accounted for more than 5% of their revenue had applied funding slightly more often and had experienced fewer difficulties in the application process than those companies for whom international travel accounted for 0–5% of their revenue. Similarly, larger companies had applied for Business Finland's funding more often and had experienced the application process as more proficient than micro companies and solo entrepreneurs had.

FIGURE 16. "Did you apply for Business Finland funding related to the corona crisis in spring 2020?"



BOX 6 MEASURES FOR FAST RECOVERY

In interviews and surveys, we asked tourism businesses and other stakeholders to give their views on what Visit Finland should do to facilitate the recovery process. The responses were very unanimous:

- Secure funding for tourism businesses and ensure that the tourism industry's interests are taken into account in government decision-making.
- Communicate funding opportunities extensively and effectively to tourism businesses.
- Focus on the nearby markets (the Nordics and the Baltics).
- Bold and fast marketing: Finland as a safe travel destination
- Open country-specific routes to travel destinations as quickly as possible (influencing).
- Ensure that companies are in position to provide the services needed in the post-COVID world.

5 CONCLUSION

This chapter summarises the key findings and conclusions of the evaluation. In addition, the chapter presents the evaluators' recommendations for Visit Finland.

The multiplicity of stakeholders active in development and promotion of tourism represents a significant challenge for the implementation of a coherent and efficient national tourism strategy. In Finland, there are some 70 regional tourism organizations, which have varied objectives, tasks and ownership structures. Locally, tourism issues are handled by municipalities and local tourist information offices. The fragmentation makes it difficult for Visit Finland to co-operate with the regions. There are almost as many models for promoting and developing tourism in Finland as there are regions. The regional organizations are very different in terms of their functions, organizational models and available resources. The roles between different actors in the regions are also unclear, which makes the set-up confusing from the companies' perspective.

The differences within and between the regions challenge Visit Finland's operating model based on four regions. Visit Finland's regional work is organised around four regions, or "Greater Areas": Helsinki capital region, Lapland, Lakeland and the Archipelago. This regional division is made primarily for branding purposes, but it also serves as a basis for cooperation. However, there are substantial differences between the four regions in the maturity of tourism in them, and each of the four regions features a number of provincial, sub-regional or municipal organizations, each with their own objectives, tasks and budgeted resources. The problem is not only the differences *between* the regions but also the differences *within* them. With each region, Visit Finland needs to approach the cooperation differently. This challenges the fundamental idea of "the Greater Areas": Four large regions can serve as a platform for international branding, but otherwise the regions are too diverse internally.

Visit Finland's importance for the tourism industry is widely recognised, and Visit Finland's services are well known among tourism businesses. However, its impact is primarily considered to be indirect: Visit Finland's activities support the whole industry rather than individual businesses. Of Visit Finland's services, the ones that are most extensively used by businesses are the events/seminars/webinars and the marketing insights/statistics.

The greatest impact to businesses is created through Visit Finland's networks and contacts with international markets. 68% of the respondents in the industry survey considered that networks and contacts with international markets are at least somewhat important. Events, seminars and webinars were seen as the second most important service. Development of digital marketing and digital capabilities is seen as the most important focus area in future development of the tourism industry.

Visit Finland's target markets correspond well with the needs of the businesses and the market potential of different markets; however, the fact that the Nordic countries and the Baltic countries have not been included in them has been seen as a deficiency. In the latest revision of the target markets (2021), also Sweden was included. All key stakeholders emphasized the importance of the closest markets, especially in the post-COVID world. For this reason, Sweden changed Visit Sweden's mandate in January 2021 to also cover domestic tourism.

The regional tourism organizations are in general very satisfied with the support they receive from Visit Finland, but they wish better predictability and earlier communication of planned activities. The regional tourism organizations wish that Visit Finland's actions would be planned and communicated more in advance. This would help them in planning and budgeting their own work. Currently the problem is that the regional organizations' budgets are already fixed by the time Visit Finland communicates its own plans.

Visit Finland faces a lot of non-compatible expectations from different regions and stakeholders. Some regions and stakeholders are more concerned about the cost-effectiveness of Visit Finland's activities and call for more specific strategic focus, while others emphasize regional equality and call for more equal treatment of different areas. Currently Visit Finland is balancing between these opposite expectations without a clear strategic choice between the two (cost-effectiveness vs. equality of regions and destinations).

No systematic assessment of promotional activities or marketing campaigns has been made and therefore there is no evidence of the impact of these activities. Assessment of the impacts of promotional campaigns is a central element of country branding and any professional marketing activity. The evidence for the evaluation of promotional work can only be acquired through monitoring of campaigns, and any evaluation findings will only be as reliable and representative as the evidence on which the evaluation is based. The impact assessment of promotional activities is necessarily campaign based: it is the only possible method for evaluating the success of the alternative measures and the additionality of the promotional work. The same applies for the programs. There is not a lot of evidence available of the programs' results and impacts, and there is no systematic culture of performance evaluations.

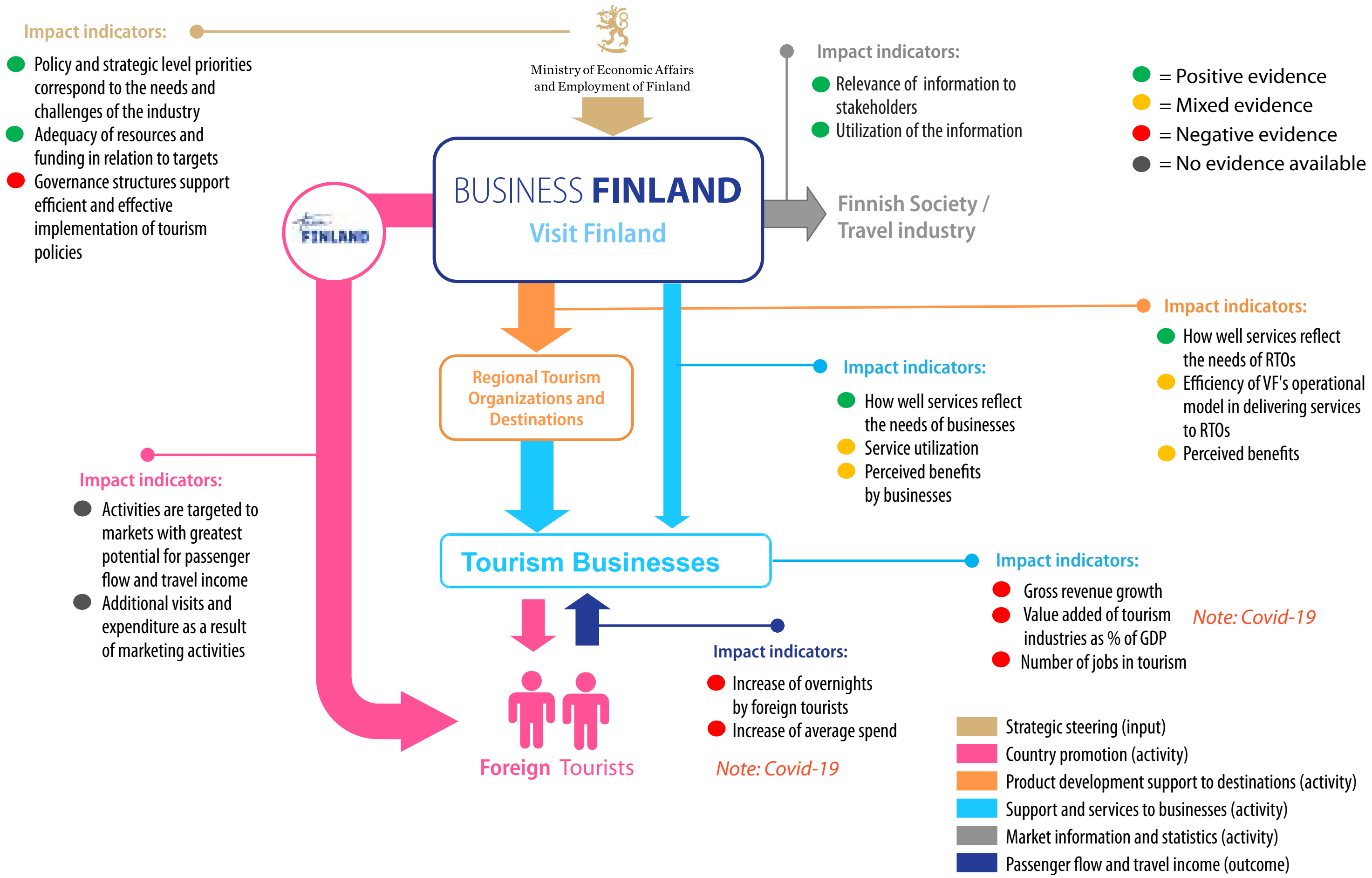
RECOMMENDATIONS

1. Stronger business focus and performance culture. The stakeholders are generally very satisfied with Visit Finland's operations. However, the operational objectives of Visit Finland are not particularly precise, and performance monitoring is rather limited. The effectiveness of different programs or marketing measures is not systematically monitored. Therefore, the results of the activities remain largely unclear to all. Visit Finland should have a stronger business focus in all of its activities, the activities should be more targeted with clear outcome targets and the performance of different activities should be monitored systematically.

2. Clearer strategic positioning in relation to the regions and destinations. Visit Finland faces a multitude of expectations from different regions and stakeholders. Some of them call for more specific strategic and regional focus, while others emphasize regional equality. Currently Visit Finland is balancing between these expectations without a clear strategic choice between the two. From an effectiveness perspective, clearer focusing would create better value-for-money, but whatever the position is, it should be more clearly defined and communicated to ensure common understanding as a basis for cooperation with different stakeholders.

IMPACT MODEL - SUMMARY OF RESULTS

The assessment is based on gathered evaluation evidence as described in this report.



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ANNEX 1. VISIT FINLAND IN COMPARISON

VISIT SWEDEN

ORGANIZATION, MANDATE AND AIMS

Since 2020 V.S. VisitSweden AB[1] has been own by the state via Ministry of Economy (Näringsdepartementet). Previously, the organization was own in half by the state and by the Swedish tourism industry. Appropriation (1:7) for promotion of tourism, is used to finance VisitSweden's operations, branding Sweden and tourism marketing of Sweden.

The mandate of Visit Sweden was changed on 1 January 2021. V.S. VisitSweden AB will market Sweden both to international and domestic target groups. The change concerns the restart of tourism business after the damages of the corona crisis. At the same time, the government allocated 120 million kr. (year 2021) for efforts to enable the conversion of tourism business and to ad-

TABLE. Summary of key figures of V.S. VisitSweden AB.

BUDGET	BRANCH OFFICES ABROAD	OVERNIGHTS BY FOREIGN VISITORS IN SWEDEN
The central allocation for Visit Sweden is ca. MEUR 10.3 (SEK 105 million) per year. The budget at Tillväxtverket for tourism statistics and development is ca. MEUR 2.4 (SEK 25 million)[2]. In 2020, total funding of Visit Sweden was ca. MEUR 15.9, of which state funding was ca. MEUR 13.9.	Visit Sweden has its own offices or representation in seven countries.	In 2019, the foreign overnights (16.0 million) increased by 2% compared to 20183. In 2018, a total of 65.2 million overnights, of which 47.9 by domestic tourists and 17.3 by international tourists[4].

[1] https://corporate.visitsweden.com/
[2] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
[3] https://www.businessfinland.fi/suomalaisille-asiakkaille/palvelut/matkailun-edistaminen/tutkimukset-ja-tilastot/matkailuvuosi
[4] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

vance sustainable tourism development*. According to the mandate, Visit Sweden shall contribute so that Sweden is an attractive destination for foreign and domestic tourists and Sweden has a competitive tourism business in the long term.
Visit Sweden's main goals are as follows:

- The tourism business will contribute to sustainable growth and increased employment around the country.
- The value of tourism will increase by overall marketing and information on Sweden as a tourism country.

V.S. VisitSweden AB will submit a special feedback report to the government (Ministry of Economy) by 1 March 2021. The feedback report concerns the aim of reorganization of operation and the aim of increasing value of tourism. With respect to the aim "Reorganising of operation will continue so that costs and income are in balance", the reporting will give answers to the following questions:

- How the company has worked on digitalization and centralisation of its operations
- Which measures have been undertaken and how the costs have decreased
- Allocation of state funds divided by cost components of the company
- Costs of efforts and level of co-financing by other actors

With respect to the aim "The value of tourism will increase by overall marketing and information on Sweden as a tourism country", the reporting will give answers to the following issues:

- How the efforts have contributed so that Sweden has and increases its attractivity as a tourism country
- How the company works on strengthening the follow-up, which kind methods are used for evaluation and analysis, and how the company remains at the standards of branch in follow-up of marketing.
- Which predominants have led to reasoning of efforts and priorities
- Extent and results of marketing efforts divided in different international markets
- In which respect have the company's efforts changed in comparison to previous years
- Costs of efforts and level of co-financing by other actors

FORMS OF ACTIVITIES

Visit Sweden implements investments on markets which have potential growth for tourism to Sweden and contributes to implementation of government's developed export and investment strategy where applicable.

Visit Sweden promotes Sweden as a destination by running marketing campaigns, ensuring social media visibility, co-operating with tour operators, and seeking to inspire foreign media to feature Sweden as a travel destination. For instance, Visit Sweden has activities such as newsletter, Svemester to increase domestic tourism and The Edible Country approach (https://ediblecountry.visitsweden.com/en). Visit Sweden does follow-up work by measuring reach, engagement and the target market's stated preference for Sweden.

As a part of its proper operational area, V.S. VisitSweden AB will contribute to preparative work concerning Sweden's participation in Expo 2020**. The Expo has been postponed to 2021–2022.

TOURISM GOVERNANCE IN SWEDEN

Both Visit Sweden and Tillväxtverket (The Swedish Agency for Economic and Regional Growth) report to the Ministry of Enterprise and Innovation. Visit Sweden is responsible for the promotion of Sweden (see above), whereas Tillväxtverket develops, implements and supports knowledge-based initiatives to promote tourism development, entrepreneurship, and SMEs competitiveness. Furthermore, Tillväxtverket supports the regions in developing and implementing action plans for sustainable regional development. Tillväxtverket is also responsible for official tourism statistics, the production and dissemination of economic knowledge on tourism as well as collaboration with other government agencies.[5] Visit the Future is a joint project between Tillväxtverket and the trade organization Svensk Turism focusing on innovative and cross-sectoral business development in Swedish tourism destinations[6].

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[5] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

[6] https://www.visitthefuture.se/

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* The Parliament approved the change of Visit Sweden's mandate on 16 December 2020. Source: https://www.regeringen.se/pressmeddelanden/2020/09/aterstart-av-besoksnaringen/, https://corporate.visitsweden.com/marknadsforing-av-sverige/svemester/

https://corporate.visitsweden.com/om-oss/en/

**The efforts of V.S. VisitSweden AB will be decided after concultation with Committee for Sweden's participation in Expo 2020 (UD 2017:1). NB. The global Expo 2020 will be held in October 2021-March 2022 due to COVID-19 pandemia.

https://corporate.visitsweden.com/om-oss/uppdraget/

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VISIT DENMARK

ORGANIZATION, MANDATE AND AIMS

The Ministry of Industry, Business and Financial Affairs steers and financies VisitDenmark[7]. According to the law on VisitDenmark, the Ministry sets yearly objectives for the VisitDenmark. The Board nominates the management of VisitDenmark for the purpose of daily management.

TABLE. Summary of key figures of Visit Denmark.

BUDGET	BRANCH OFFICES ABROAD	OVERNIGHTS BY FOREIGN VISITORS IN DENMARK
N/A	Visit Denmark has marketing offices in eight countries.	Overnights by foreign visitors in Denmark. In 2019, the foreign overnights (13.0 million) increased by 3% compared to 2018[8]. In 2018, a total of 53.9 million tourist bed-nights. Inbound tourists accounted for 51% of total bed-nights[9].

7 Homepage: https://www.visitdenmark.dk/corporate/

8 https://www.businessfinland.fi/suomalaisille-asiakkaille/palvelut/matkailun-edistaminen/tutkimukset-ja-tilastot/matkailuvuosi

9 OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

According to the law on Visit Denmark (law does not concern Faroe Islands and Greenland), Visit Denmark is the national tourism organization, which aims to promote Denmark as a tourist destination and through it contributes to creation of economic growth in Danish tourism business. VisitDenmark conducts international marketing and branding activities, collects information and prepares analysis for tourism actors in Greenland, Faroe Islands, Iceland, Norway, Sweden and Finland with purpose to promote these countries as a tourist destination in other countries than Denmark.

The Danish National Tourism Strategy 2025 was developed by the National Tourism Forum in 2016. The Strategy's three goals to 2025 are as follows:

1. Grow visitation by a third, equivalent to 17 million more bed-nights compared with 2015: progress is on track, with 2018 bed-nights (0.6 million ahead of target).
2. Grow tourism spending to DKK 140 billion, equivalent to an additional DKK 45 billion compared to 2014: progress on track, with 2017 tourism spending of DKK 128 billion ahead of target.
3. Visitor satisfaction scores in line with Northern European average: on target.

In addition, VisitDenmark had a Smart Tourism Strategy for the years 2017–2019.

FORMS OF ACTIVITIES

Visit Denmark has three main forms of action:

1. International marketing and branding of Denmark. Commissioning of international marketing and branding activities with purpose to develop new markets and to maintain established markets.
2. Coordination of international activities, which are co-financed by public services, for promotion of Danish tourism products and experiences, and branding of Denmark as a tourist attraction.
3. To collect information and prepare analysis about Denmark as a tourist destination with purpose to distribute the knowledge to public, herewith tourism business, authorities and municipal tourism actors.

The knowledge center (Viden center) of Visit Denmark provides information on markets, trends, statistics and impact of tourism.

At the homepage (https://www.visitdenmark.com), the services of Visit Denmark are divided for tourists, travel professionals and business events. For instance, country-specific market toolboxes are provided for travel professionals.

TOURISM GOVERNANCE IN DENMARK

Visit Denmark cooperates with the Ministry, the Danish National Tourism Forum and the regional tourism development agencies. The National Tourism Forum has the coordinating role. VisitDenmark's chairman is a member of the Danish National Tourism Forum, which was established to coordinate tourism sector. Visit Denmark has also partnerships e.g. with consumer brands.

In addition, there are three national tourism development agencies at the national level. Danish Coastal and Nature Tourism, Danish Business and Conferencing Tourism, and Wonderful Copenhagen, which includes Danish City Tourism, are responsible for developing their respective business areas through strategic development plans aligned with the existing national tourism strategy. At the decentralized level, there are 15–20 local destination management organizations.

SOURCES

Updated legislation 2019. Lov om Visit Denmark. LBK nr 243 af 15/03/2019. https://www.retsinformation.dk/eli/lta/2019/243

https://www.visitdenmark.dk/corporate/om-os

https://www.visitdenmark.dk/corporate/om-os/formaal-og-strategi/formaal-og-strategi

Nordic Tourism Policy Analysis. 2019. Nordic Council of Ministers.

Den national strategi for dansk turisme 2025. September 2016. https://em.dk/publikationer/2016/national-strategi-for-dansk-turisme/

INNOVATION NORWAY / VISIT NORWAY

ORGANIZATION, MANDATE AND AIMS

Innovation Norway[10] is owned and funded by the Ministry of Trade, Industry and Fisheries (51%) and the county authorities (49%). Visit Norway represents the travel and tourism sector within Innovation Norway.

Innovation Norway is the National and Regional Government's policy instrument for value-creating business development across Norway. The mission is to increase value for Norwegian business and industry. The marketing of Norway as a tourist destination is considered as one of the important tasks of Innovation Norway. The mandate is to promote Norwegian tourism in selected countries.

The main goal is that Innovation Norway will initiate business development, which is economically and socially profitable, and promote regional business opportunities. The three sub-goals are as follows: more good entrepreneurs, more fast-growing businesses and more innovative business environments.

TABLE. Summary of key figures of Innovation Norway / Visit Norway.

BUDGET	BRANCH OFFICES ABROAD	OVERNIGHTS BY FOREIGN VISITORS IN NORWAY
In 2020, Innovation Norway received ca. MEUR 17.1 (NOK178million) state funding for its role as National Tourism Organization. In addition to these earmarked funds, Norwegian tourism companies received approximately ca. MEUR 31.2 (NOK 315 million) in 2018 from various funding sources in Innovation Norway, to develop their activity[11].	Innovation Norway's offices are located in more than 10 countries worldwide and in all Norwegian counties.	In 2019, the foreign overnights (9.4 million) increased by 6% compared to 2018. In 2018, Norwegians accounted for 69.3% of all commercial overnight stays (a total of 19.0 million overnights)[12].

[10] Homepage: https://www.innovasjonnorge.no/
[11] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
[12] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

The Tourism Strategy for Innovation Norway (2014–2020)[13] follows the Innovation Norway's main strategy. In 2017, the Government published a white paper on tourism[14]. The white paper "Experience Norway – unique and adventurous" presents the overall policy for the tourism industry and policy measures. In 2017, the tourism industry initiated and created a roadmap "Towards Sustainable Travel and Tourism in Norway" for the tourism industry in Norway[15].

Based on the OECD review, a key policy development in 2019 was the launch of the cultural tourism strategy. The work was led jointly by the Ministry of Culture and the Ministry of Trade, Industry and Fisheries with input from many other interest groups[16].

FORMS OF ACTIVITIES

Innovation Norway has four categories of services for the tourism sector:

1. Financing of tourism activities contains loans, grants and guarantees to the tourism industry and the market portfolio. Regular financing services of the Innovation Norway are used and there are no specific funding schemes for tourism. The market portfolio consists of 15 markets in Europe, USA, Asia and Latin America. Some activities are aimed at Norwegians in order to increase the use of domestic tourist products.
2. Advice, information and financing concerning the destination development.
3. Advice and financing concerning the marking tool, which systematizes the work on sustainability for a destination
4. Courses and expertise for the tourism industry. Courses are often organised in collaboration with other players in the industry.

13 https://www.innovasjonnorge.no/globalassets/reiseliv/tourism-strategy-innovation-norway-2014-2020.pdf
https://www.regjeringen.no/en/topics/business-and-industry/travel-industry/experiencing-norway--a-unique-adventure/id2578740/

14 https://www.regjeringen.no/contentassets/94f3112edc3846c1b52698c3401120c3/reiselivsengelsk.pdf

15 https://assets.simpleviewcms.com/simpleview/image/upload/v1/clients/norway/veikart_reiseliv_4korr_59468bf8-244f-447e-9709-8ce8ed8de49d.pdf

16 OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

TOURISM GOVERNANCE IN NORWAY

Innovation Norway is also the regional policy instrument (see above). Some regions and municipalities have strategies for tourism and many give financial support to their local Destination Management Organizations. The recent regional reform in 2020 is expected to benefit the tourism industry, which interacts with many sectors and stakeholders across current regional borders.

SOURCES

https://www.innovasjonnorge.no/en

https://www.innovasjonnorge.no/en/start-page/our-services/tourism-agricluture-fish/

https://www.innovasjonnorge.no/no/om/oppdrag-og-resultater/om-oppdragene/

https://www.innovasjonnorge.no/no/om/oppdrag-og-resultater/om-oppdragene/innovasjon-norge--et-sarlovselskap-med-klare-mal/

Lov om Innovasjon Norge. https://lovdata.no/dokument/NL/lov/2003-12-19-130?q=lov+om+innovasjon+norge

https://business.visitnorway.com/no/barekraftig-reiseliv/sustainability-and-tourism-in-innovation-norway/

Nordic Tourism Policy Analysis. 2019. Nordic Council of Ministers.

BUSINESS ICELAND / VISIT ICELAND

ORGANIZATION, MANDATE AND AIMS.

As of 31 January 2021 Promote Iceland changed its name to Business Iceland[17]. Business Iceland[18] is a public-private partnership. Ministry for Foreign Affairs nominates two board members, Ministry of Industries and Innovation nominates one board member and the Confederation of Icelandic Enterprise nominates four members for a three-year term.

Visit Iceland, which is the official destination marketing office, is a part of Business Iceland. In addition, there are seven regional marketing offices of tourism around Iceland.

Business Iceland was established to improve the competitiveness of Icelandic companies in foreign markets and to stimulate economic growth through increased export.

The goal of Business Iceland is to strengthen Iceland's image and reputation, enhance the competitive position of Icelandic undertakings on foreign markets and to attract foreign investment and tourists to the country.

17 Business Iceland Act. https://www.businessiceland.is/about/the-business-iceland-act

18 Homepage: https://www.businessiceland.is

TABLE. Summary of key figures of Business Iceland / Visit Iceland.

BUDGET	BRANCH OFFICES ABROAD	OVERNIGHTS BY FOREIGN VISITORS IN NORWAY
In 2020, total funding and state funding of Visit Iceland was ca. MEUR 7.4.	No branch offices abroad.	In 2019, the foreign overnights (5.4 million) decreased by 1% compared to 2018. In 2018, the domestic overnights (1.1 million) represented 13% of total overnights[19].

Visit Iceland aims to attract travellers to Iceland. The role is to attract foreign tourists to Iceland with coordinated promotional and marketing operations.

The Tourism Strategy for the years 2011–2020 was written in cooperation between the Ministry of Industries and Innovation, the Icelandic Travel Industry Association and the Icelandic Association of Local Authorities. Iceland has a temporary body Tourism Task Force in 2015–2020. On the basis of an agreement made between the government, the Icelandic Travel Industry Association and the Icelandic Association of Local Authorities, the Tourism Task Force was established to implement the projects set out in the Roadmap for Tourism in Iceland (2015). The revised Tourism Council, with wider membership, will continue much of the Task Force's work.

In 2019, Iceland published a new long-term Tourism Policy Framework with a strong focus on sustainability. The framework will guide the work on a new action-oriented tourism strategy[20].

FORMS OF ACTIVITIES

Visit Iceland is a platform for cooperation with network of Icelandic and foreign tour operators and other stakeholders in Icelandic tourism. Visit Iceland works on promoting and marketing to consumers in collaboration with the tourist industry.

All marketing activities are done under the umbrella of Inspired by Iceland, which is the official travel trade website[21].

[19] https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/14/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b-6c960&itemIGO=oecd&itemContentType=book

[20] https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/14/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b-6c960&itemIGO=oecd&itemContentType=book

[21] http://traveltrade.inspiredbyiceland.com/

Visit Iceland provides toolbox for travel professionals and market research. The content of the toolbox is as follows:

- Series of webinars about Iceland (get to know Iceland)
- Information about the three international target groups for Icelandic tourism (The Fun-loving Globetrotter, The Independent Explorer, the Cultural Comfort Seeker)
- A collection of surveys on tourism in Iceland
- Destination guide. A general presentation on the destination.
- Marketing and branding.
- Database of accommodation, activities, transportation, and information about events and festivals

Tourism governance. The Ministry of Industries and Innovation is responsible for developing tourism policy and co-ordinating the work of governmental bodies. The recently merged Department of Tourism and Innovation, is the lead department and it oversees the operation and performance of the national tourism board, the Icelandic Tourist Board. The Icelandic Tourist Board's responsibilities include the implementation of government tourism policy, planning and support for regional development, licencing and monitoring of licenced activities, data collection, processing and presentation, safety, quality and consumer protection in relation to tourism, and administration of the Tourist Site Protection Fund.

SOURCES

https://www.businessiceland.is/key-sectors/tourism

https://visiticeland.com/

The official travel trade website of Inspired by Iceland. http://traveltrade.inspiredbyiceland.com/

Toolbox for travel professionals. http://traveltrade.inspiredbyiceland.com/toolbox-for-travel-professionals/

Marketing and branding. http://www.islandsstofa.is/media/1/grunnstodir-enska-sept-2018.pdf

Market Research. http://traveltrade.inspiredbyiceland.com/toolbox-for-travel-professionals/research

Nordic Tourism Policy Analysis. 2019. Nordic Council of Ministers.

CONCLUSIONS

TABLE. Summary of the benchmarking of the tourism organizations in Sweden, Denmark, Norway and Iceland.

	VISIT SWEDEN AB	VISIT DENMARK	INNOVATION NORWAY / VISIT NORWAY	BUSINESS ICELAND / VISIT ICELAND	VISIT FINLAND
Budget	The central allocation for Visit Sweden is ca. MEUR 10.3 (SEK 105 million) per year. The budget at Tillväxtverket for tourism statistics and development is ca. MEUR 2.4 (SEK 25 million)[22]. In 2020, total funding of Visit Sweden was ca. MEUR 15.9, of which state funding was ca. MEUR 13.9.	N/A	In 2020, Innovation Norway received ca. MEUR 17.1 (NOK178million) state funding for its role as National Tourism Organization. In addition to these earmarked funds, Norwegian tourism companies received approximately ca. MEUR 31.2 (NOK 315 million) in 2018 from various funding sources in Innovation Norway to develop their activity[23].	In 2020, total funding and state funding of Visit Iceland was ca. MEUR 7.4.	In 2020, total state funding of Visit Finland was MEUR 14.5. In addition, Visit Finland received MEUR 0.9 private funding.
Mandate	Visit Sweden is responsible for the promotion of Sweden. Visit Sweden markets Sweden both to international and domestic target groups. NB. Tillväxtverket is responsible for promotion of tourism development and official tourism statistics.	Visit Denmark is responsible for international marketing and branding of Denmark, coordination of international activities and collection of information about Denmark as a tourist destination (Viden Center).	Visit Norway represents the travel and tourism sector within Innovation Norway. Visit Norway is responsible for marketing of Norway as a tourist destination (domestic and international marketing) and financing of tourism activities. Re-gular financing services of the Innovation Norway are used and there are no specific funding schemes for tourism.	Visit Iceland, which is the official destination marketing office, is a part of Business Iceland. Visit Iceland works on promoting and marketing to consumers in collaboration with the tourist industry. All marketing activities are done under the umbrella of Inspired by Iceland. Visit Iceland provides also toolbox for travel professionals and market research.	Visit Finland is responsible for promoting travel from abroad to Finland. In addition to marketing, Visit Finland helps Finnish travel companies to internationalize. Visit Finland carries out the tourism statistics service.

[22] OECD Tourisn Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
[23] OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en

	VISIT SWEDEN AB	VISIT DENMARK	INNOVATION NORWAY / VISIT NORWAY	BUSINESS ICELAND / VISIT ICELAND	VISIT FINLAND
Branch offices abroad	Visit Sweden has its own offices or representation in seven countries.	Visit Denmark has marketing offices in eight countries.	Innovation Norway's offices are located in more than 10 countries worldwide and in all Norwegian counties.	No branch offices abroad	Visit Finland has representative in 12 countries.
Overnights by foreign visitors in the country	In 2019, the foreign overnights (16.0 million) increased by 2% compared to 2018[24]. In 2018, a total of 65.2 million overnights, of which 47.9 by domestic tourists and 17.3 by international tourists[25].	Overnights by foreign visitors in Denmark. In 2019, the foreign overnights (13.0 million) increased by 3% compared to 2018[26]. In 2018, a total of 53.9 million tourist bed-nights. Inbound tourists accounted for 51% of total bed-nights[27].	In 2019, the foreign overnights (9.4 million) increased by 6% compared to 2018. In 2018, Norwegians accounted for 69.3% of all commercial overnight stays (a total of 19.0 million overnights)[28].	In 2019, the foreign overnights (5.4 million) decreased by 1% compared to 2018. In 2018, the domestic overnights (1.1 million) represented 13% of total overnights[29].	In 2019, the foreign overnights (7.0 million) increased by 3% compared to 2018[30].

24 https://www.businessfinland.fi/suomalaisille-asiakkaille/palvelut/matkailun-edistaminen/tutkimukset-ja-tilastot/matkailuvuosi
25 OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
26 https://www.businessfinland.fi/suomalaisille-asiakkaille/palvelut/matkailun-edistaminen/tutkimukset-ja-tilastot/matkailuvuosi
27 OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
28 OECD Tourism Trends and Policies 2020. https://www.oecd-ilibrary.org/sites/6b47b985-en/index.html?itemId=/content/publication/6b47b985-en
29 https://www.oecd-ilibrary.org/sites/6b47b985-en/1/3/4/14/index.html?itemId=/content/publication/6b47b985-en&_csp_=a806bfa96e09b9351b58695070b6c960&itemIGO=oecd&itemContentType=book
30 https://www.businessfinland.fi/4958c7/globalassets/julkaisut/visit-finland/tutkimukset/2020/2019-review---travel-in-finland.pdf

ANNEX 2. SURVEYS

SURVEY FOR COMPANIES

FIGURE 1. Mikä on yrityksenne pääasiallinen toimiala? (n=64)

FIGURE 2. Yrityksen päätoimipaikan sijaintialue? (n=64)

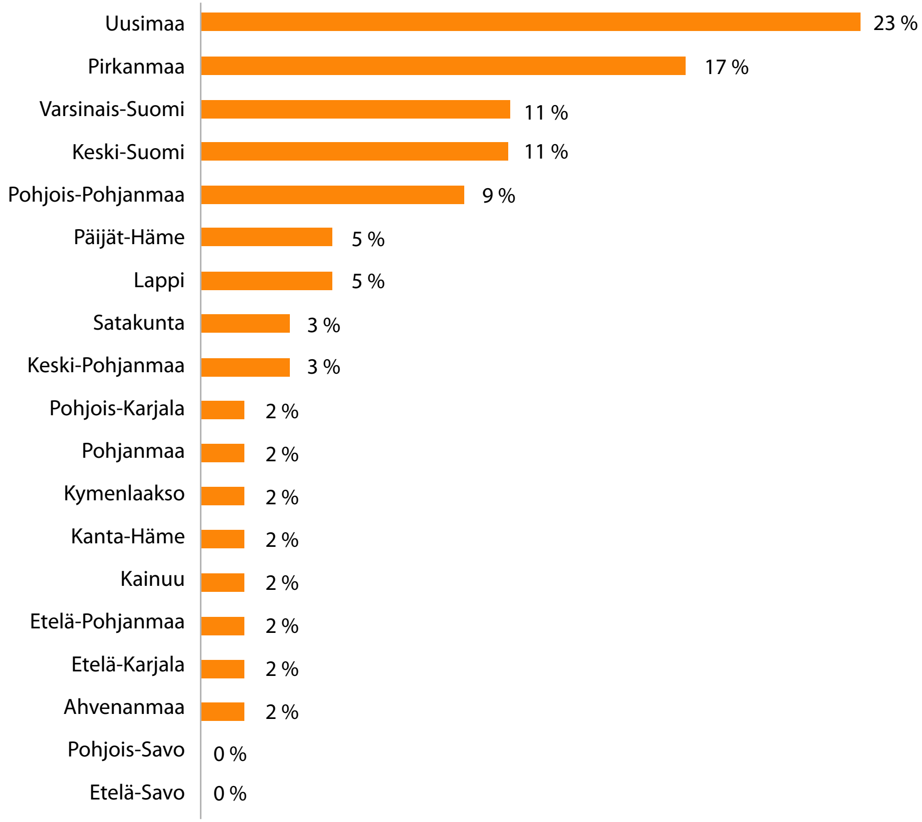


FIGURE 3. Kansainvälisten matkailijoiden osuus yrityksenne liikevaihdosta vuonna 2019? (n=69)

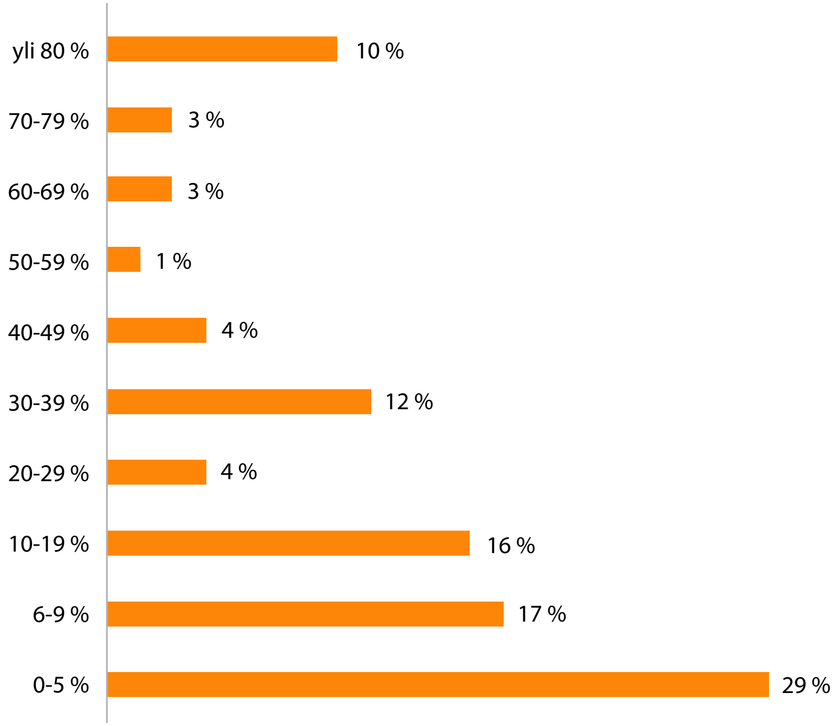


FIGURE 4. Yrityksen koko (n=69)

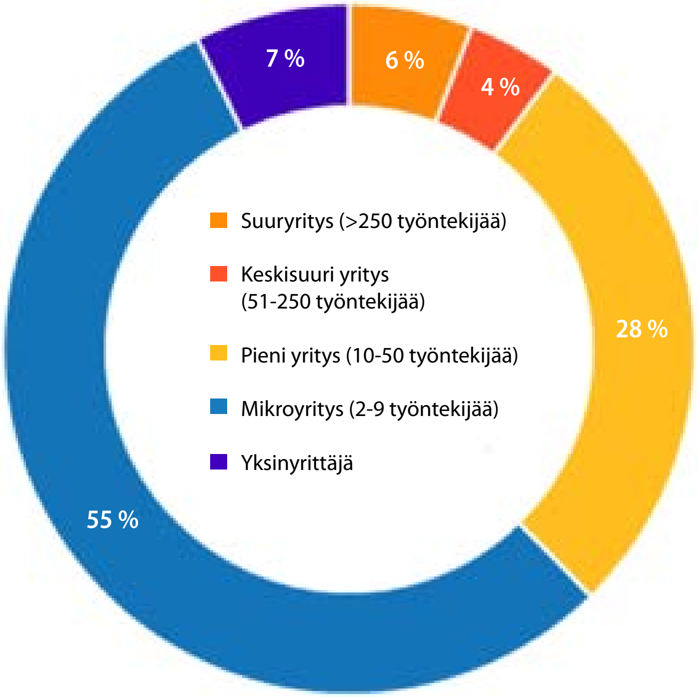


FIGURE 5. Kuinka hyvin tunnet Visit Finlandin toimintaa? (n=56)

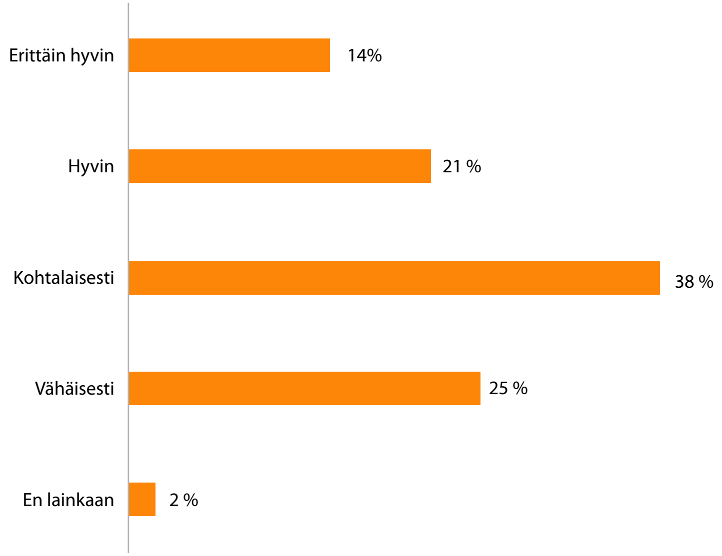


FIGURE 6. Oletteko osallistuneet Visit Finlandin järjestämiin tapahtumiin, koulutuksiin tai muuten hyödyntäneet Visit Finlandin/business Finlandin palveluja? Valitse kaikki ne, joita olette hyödyntäneet viimeisen 5 vuoden aikana. (n=47)

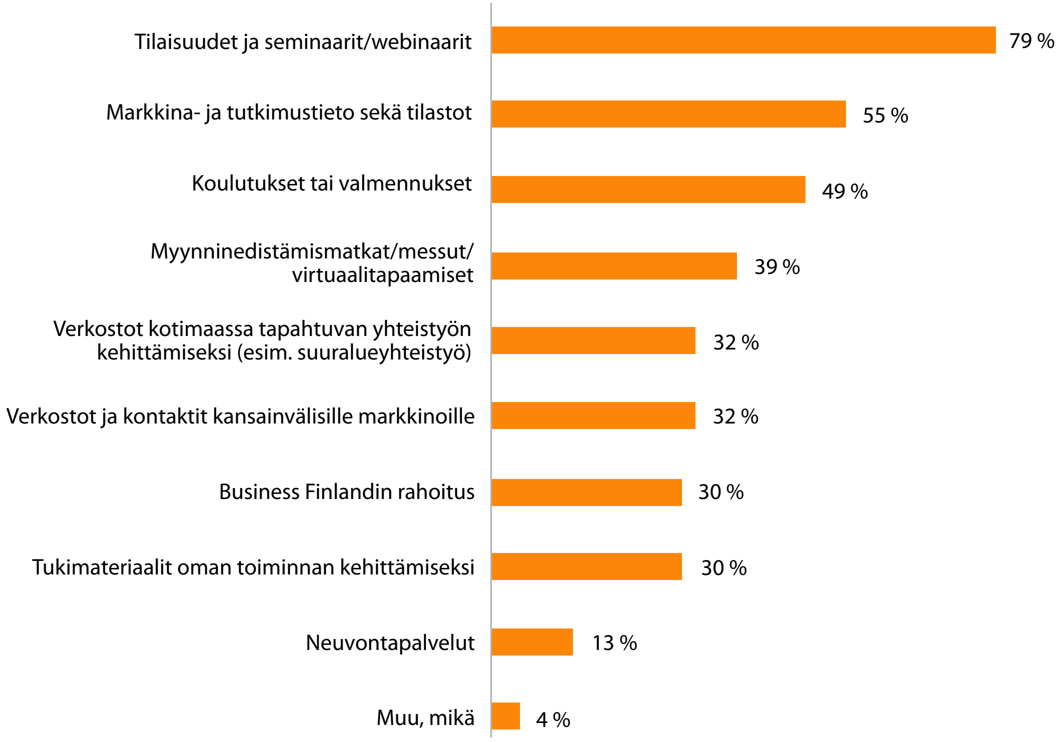


FIGURE 7. Mitä seuraavista Visit Finlandin toimintamuodoista koet hyödylliseksi oman yrityksenne näkökulmasta? (n=51-53)

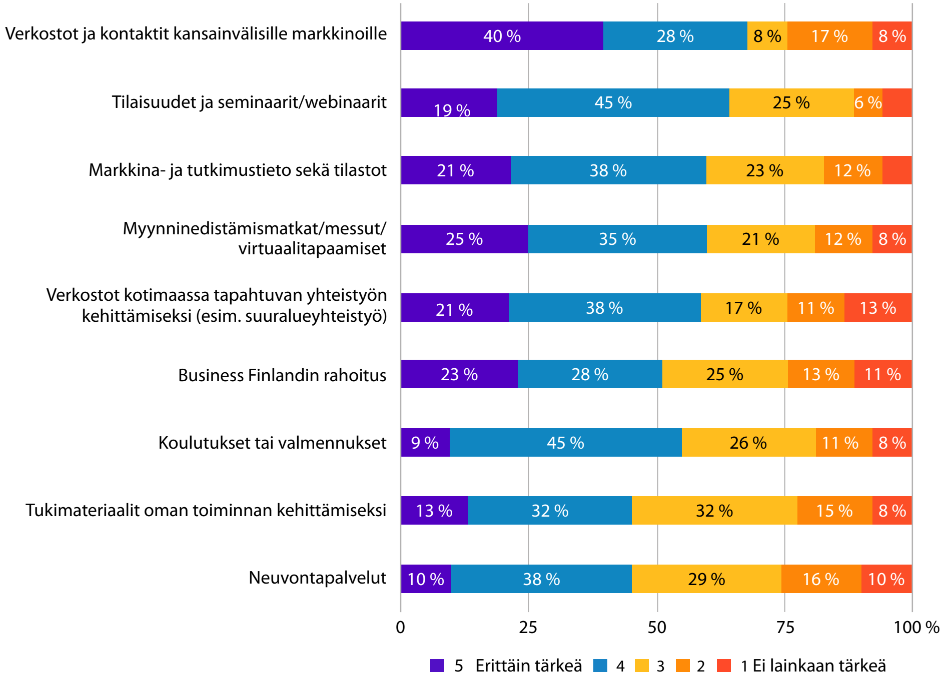


FIGURE 8. Oletteko osallistuneet johonkin seuraavista Visit Finlandin ohjelmista tai hyödyntäneet suoraan niiden tuloksia? Mihin seuraavista? (n=51)

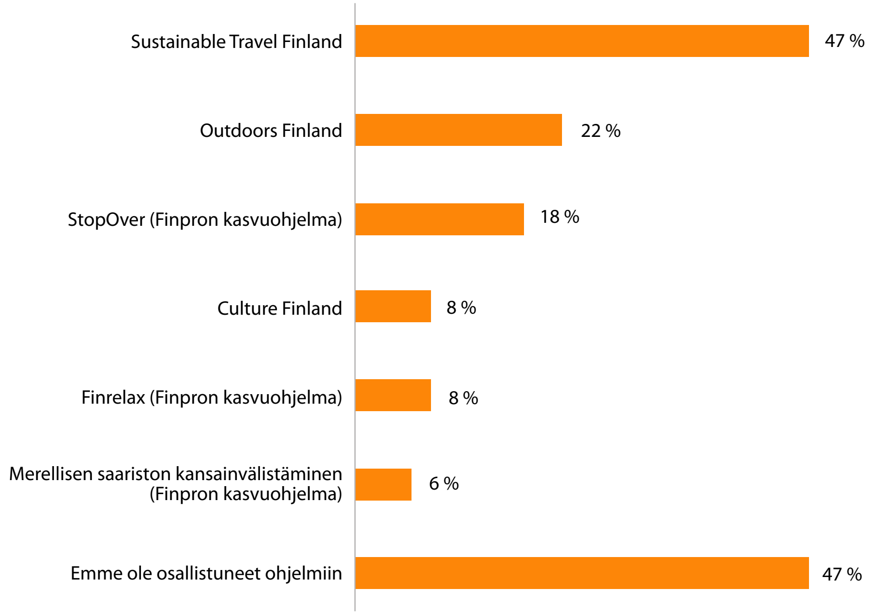


FIGURE 9. (n=55)

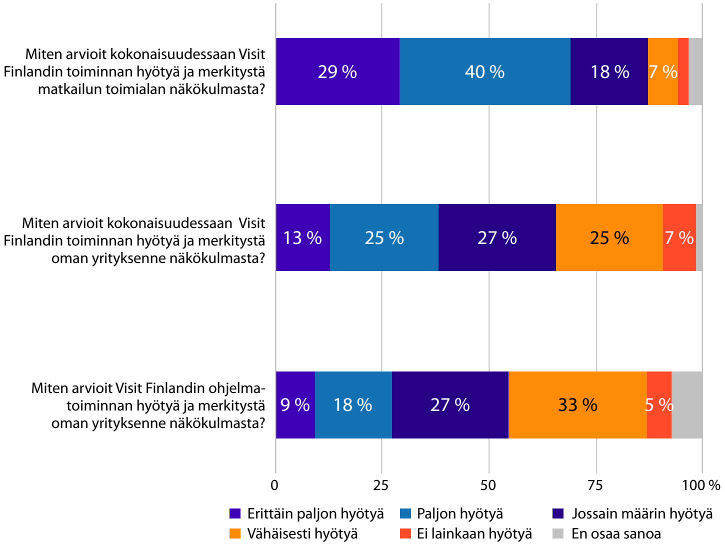


FIGURE 10. Arvioi seuraavien teemojen tärkeyttä oman yrityksenne liiketoiminnan kehittämisen näkökulmasta. (1 Ei lainkaan tärkeä - 5 Erittäin tärkeä.) (n=48-51)

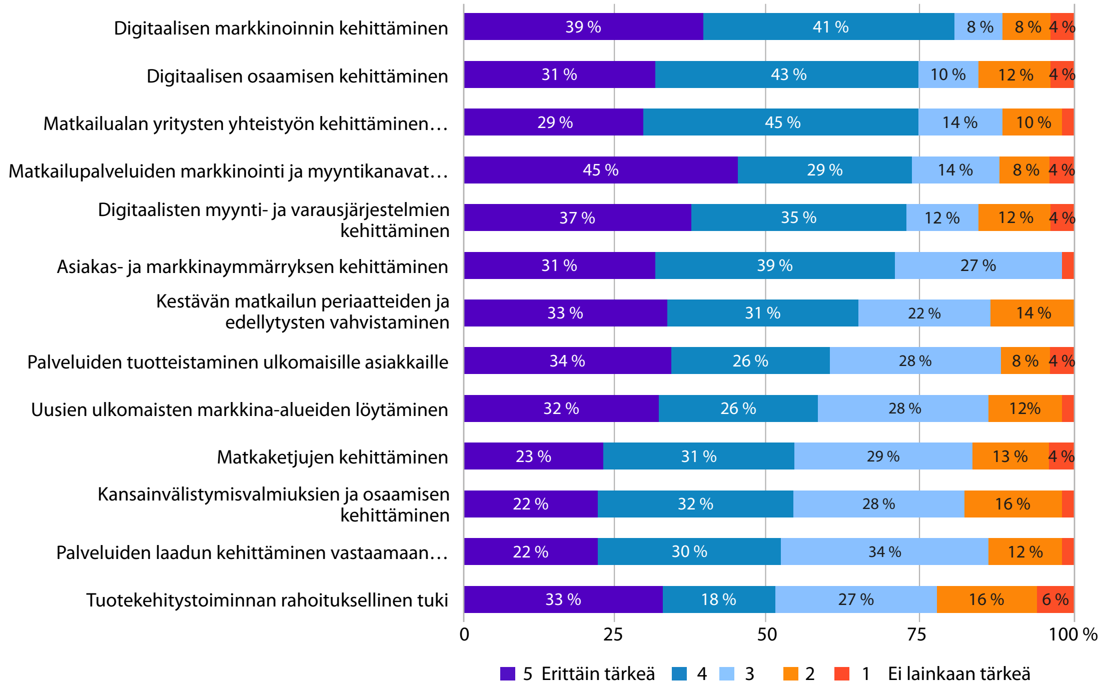


FIGURE 11. Kuinka paljon olette viimeisen 5 vuoden aikana panostaneet seuraaviin tekijöihin yrityksessänne? (n=50-51)

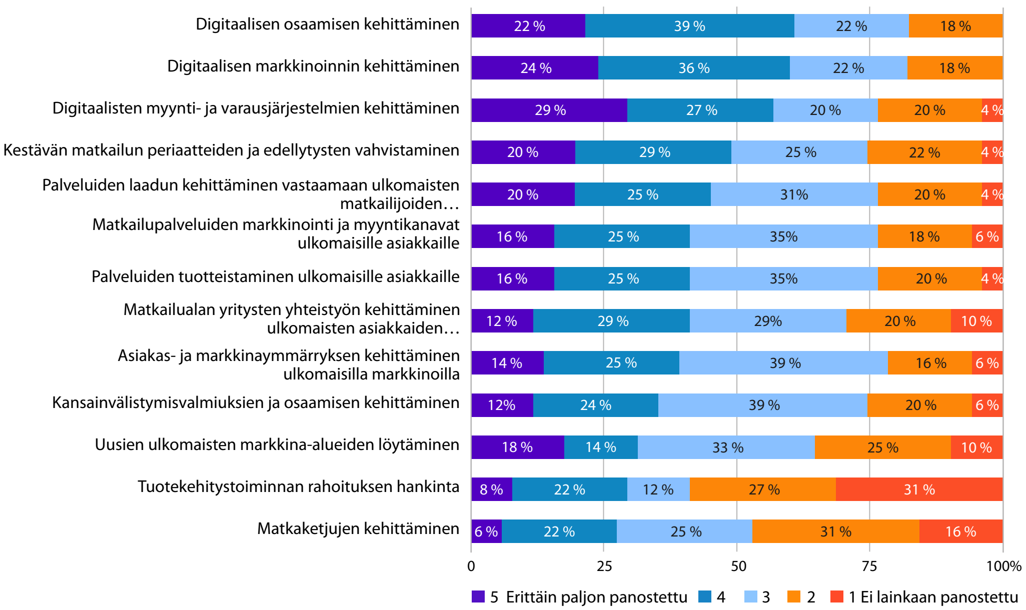
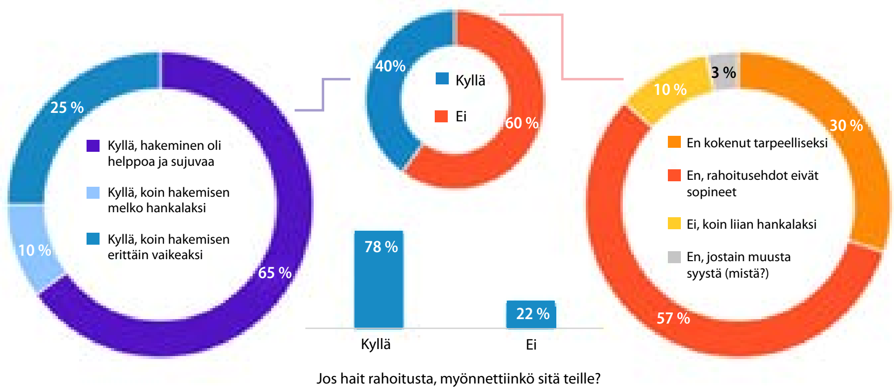


FIGURE 12. Haitteko Business Finlandilta keväällä 2020 koronakriisin vuoksi myönnettyä rahoitusta? Valitse parhaiten sopiva vaihtoehto. (n=50).
JOS haitte rahoitusta, myönnettiinkö teille sitä? (n=23)



SURVEY FOR REGIONAL TOURISM ORGANIZATIONS

FIGURE 13. Millä suuralueella työskentelet? (n=18)

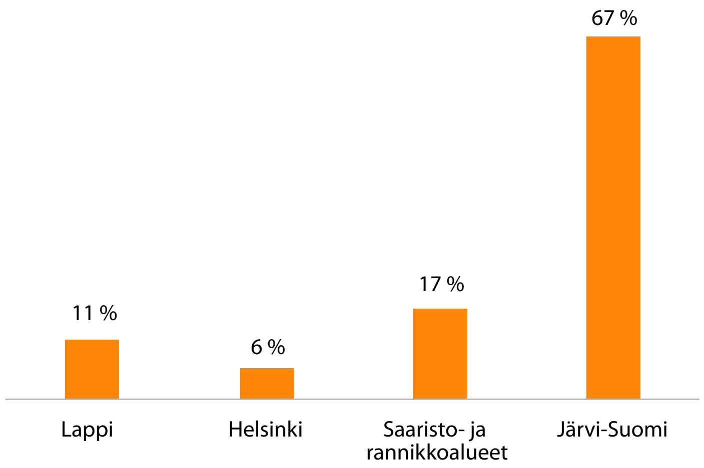


FIGURE 14. Mikä seuraavista kuvaa parhaiten taustaorganiaatiotasi? (n=18)

FIGURE 15. Kuinka paljon teet omassa työssäsi yhteistyötä Visit Finlandin kanssa? (n=18)

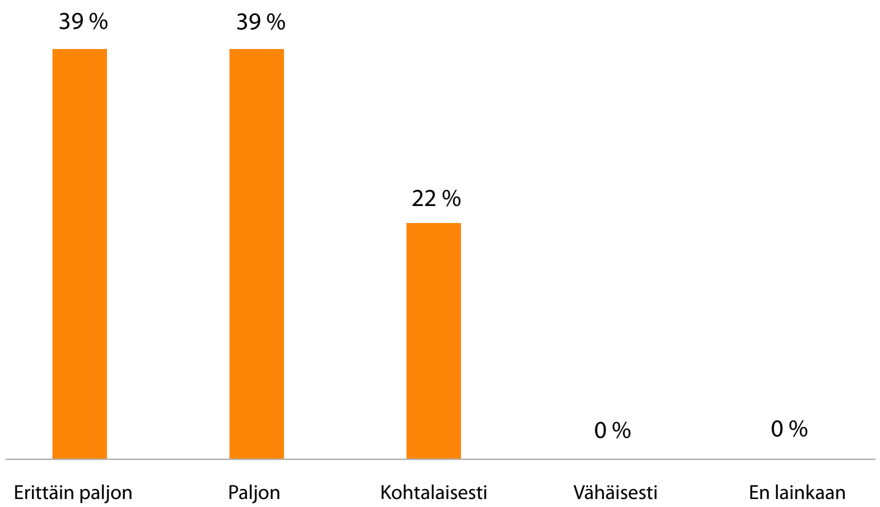


FIGURE 16. Kuinka tärkeänä pidät yhteistyötä Visit Finlandin kanssa oman työsi menestyksekkään ja tuloksellisen hoitamisen näkökulmasta? (n=18)

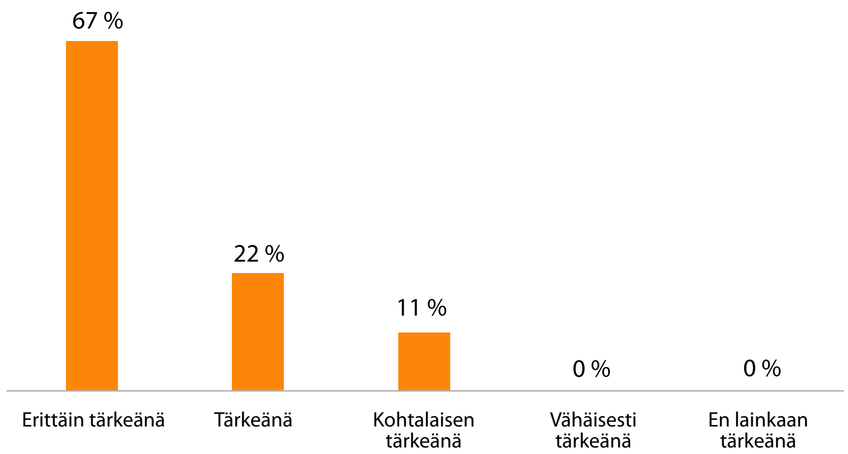


FIGURE 17. Arvioi seuraavia Visit Finlandia koskevia väittämiä (n=16)

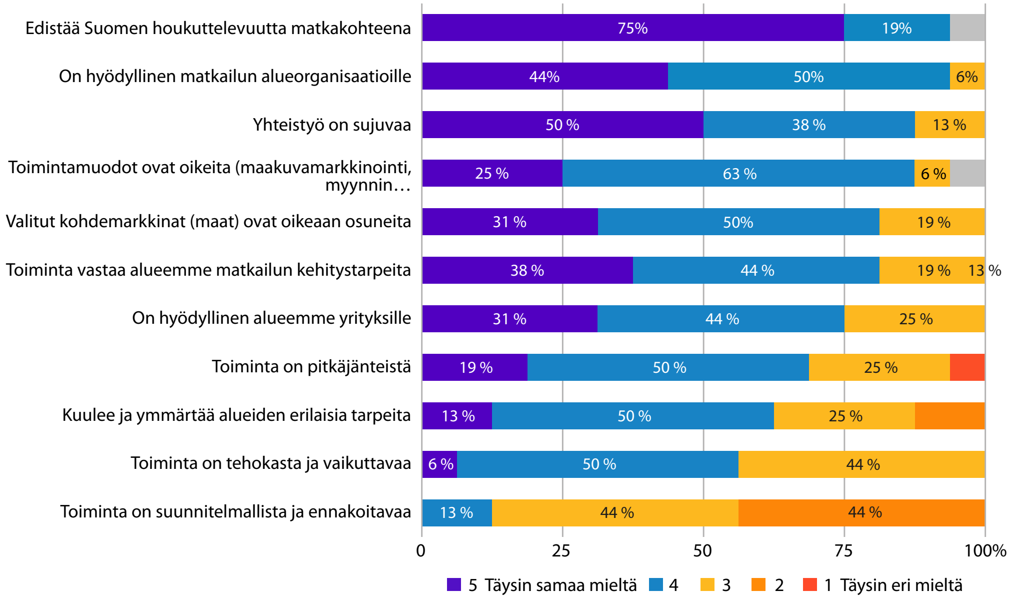


FIGURE 18. Arvioi seuraavien Visit Finlandin toimintamuotojen tärkeyttä oman alueenne matkailun edistämisen näkökulmasta. (n=16)

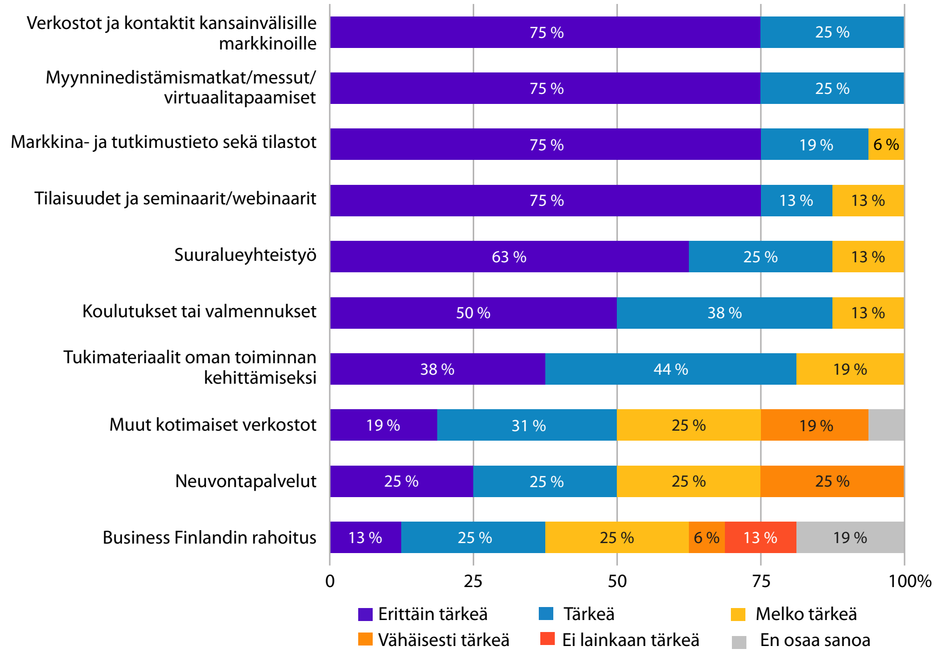
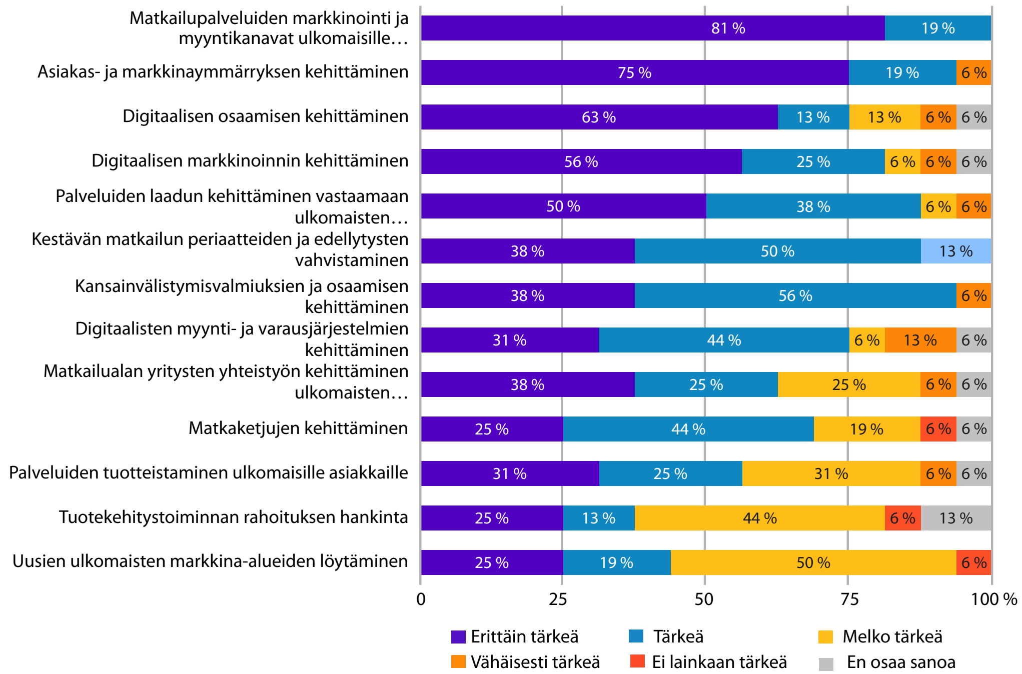
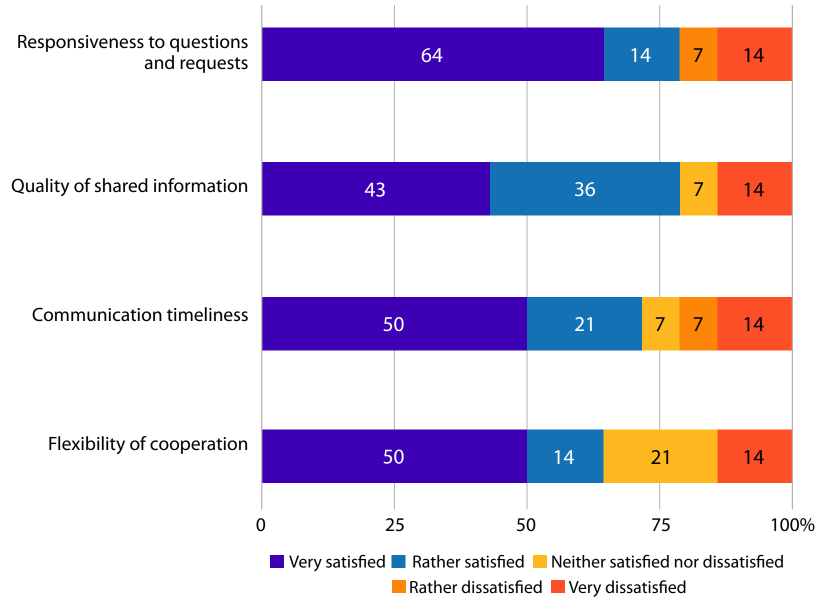


FIGURE 19. Arvioi seuraavien Visit Finlandin toimintamuotojen tärkeyttä oman alueenne matkailun edistämisen näkökulmasta. (n=16)



SURVEY FOR INTERNATIONAL STAKEHOLDERS

FIGURE 20. How satisfied are you with the following aspects of cooperation? (n=14)



BUSINESS **FINLAND**

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WWW.BUSINESSFINLAND.FI/EN