



Managing Social Tourism Pressure in Helsinki 2025

Helsinki

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Managing Social Tourism Pressure in Helsinki 2025

Background

Social carrying capacity in tourism refers to the maximum number of visitors a destination can accommodate without causing unacceptable impacts for local residents or diminishing the experience for other visitors. When this capacity is exceeded, it is referred to as overtourism¹.

The UN World Tourism Organization (UNWTO) predicts a strong increase in global tourism. In 2024, an estimated 1.4 billion international tourists (overnight visitors) were recorded globally. This figure is projected to grow to 1.8 billion by 2030². As tourism grows across Europe, many popular destinations have started to suffer from overtourism and its negative impacts, such as congestion, rising prices, and disruptive behavior. These consequences have led to growing local opposition, including protests in countries like Spain, where new regulations are being planned to curb the negative effects of tourism. Some similar concerns have been voiced also in Finland in destinations such as Rovaniemi³.

[Finland's national tourism strategy](#) (2022–2028) envisions the country as the most sustainably growing destination in the Nordics⁴. Helsinki's goal is to become the world's most sustainable tourism destination, a goal supported by its top ranking in the 2024 [Global Destination Sustainability](#) (GDS) Index⁵. While pursuing sustainable tourism, Helsinki also seeks significant growth in visitor numbers.

Helsinki is well-positioned to benefit from increasing global demand, as Northern destinations, "coolcation", and nature-oriented, lesser-known places are becoming increasingly attractive⁶. New travel destinations are sought based on their value for money and unique, authentic experiences. In addition, sustainable travel destinations are attracting more and more international travelers⁷.

To date, overtourism has not emerged as a significant issue in Helsinki. On the contrary, the city welcomes the positive economic, employment, and vitality impacts of growing tourism. However, as visitor numbers increase, it is crucial for Helsinki to continuously monitor and assess its social tourism pressure.

From the perspective of social sustainability, it is important that Helsinki is able to maintain its residents' positive attitude towards tourism and ensure that tourists experience Helsinki as an excellent travel destination. Social acceptance of tourism can be secured and improved by identifying and preventing the negative effects of tourism. The goal is to ensure that the benefits of tourism outweigh the disadvantages.

1 UNWTO. (2018). ['Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions](#)

2 UNWTO. (2024). [World Tourism Barometer](#).

3 Yle uutiset. (2024). [Rovaniemeläiset marssivat matkailun kasvua vastaan: "Kaupunki kuolee turismin alta", sanoo poismuuttoa harkitseva](#)

4 Työ- ja elinkeinoministeriö. 2022. [Yhdessä enemmän – kestävä kasvua ja uudistumista Suomen matkailuun Suomen matkailustrategia 2022–2028 ja toimenpiteet 2022–2023](#). Työ- ja elinkeinoministeriön julkaisuja 2022:51

5 Global Destination Sustainability Movement. (2025). [Top 40 Cities](#).

6 World Economic Forum. (2024). [The rise of 'coolcations' and other urban transformation stories you need to read](#).

7 European Travel Commission. (2024). [European tourism reaches new highs in 2024 as travellers' plans diversify](#).

Description of Work

The aim of this situation analysis is to provide an up-to-date view of the social pressure caused by tourism in Helsinki. To support the analysis, a model for managing social tourism pressure was developed, comprising around 40 indicators with data spanning 2019–2024. For some indicators, data was not available for the entire period. These indicators cover aspects such as visitor volumes and intensity, economic impacts, safety, and satisfaction levels among tourists and residents. A five-year statistical review offers a comprehensive look at current tourism conditions and trends, while also reflecting significant recent events affecting tourism in Helsinki, such as the COVID-19 pandemic that began in 2020 and Russia's invasion of Ukraine that began in 2022. This work was carried out by Sitowise Oy during April–May 2025.

Moving forward, Helsinki plans to assess the social pressure related to tourism annually using the model's indicators. These can be used to track trends in visitor pressure, draw conclusions on the current situation and plan measures to alleviate any problems that have been identified.



Photo: Svante Gullichsen

Current State Analysis

The current social pressure of tourism in Helsinki is described and analyzed below using the results of indicators related to visitor volumes, visitor intensity, economic perspectives, safety, and satisfaction of both tourists and residents.

Visitor Volumes

In 2024, Helsinki recorded approximately 2.6 million arriving visitors, representing an increase of nearly 4% compared to 2019. From 2023 to 2024, the number of arriving tourists grew by over 9%. The number of registered overnight stays in Helsinki was approximately 4.6 million in 2024, which is roughly the same as in 2019, before the coronavirus pandemic. The growth in registered overnight stays from 2023 to 2024 was as high as 10 percent. Preliminary statistics for Q1 of 2025 also show strong growth: January +10%, February +9%, and March +5%. International visitors accounted for approximately 2.2 million overnight stays in 2024, representing a 17% increase over 2023, although still below the 2019 level of 2.4 million⁸.

8 Helsingin kaupunki. (2025). [DataLokki – Helsinki Destination Insights](#)

In terms of hotel occupancy rates, the most popular month for tourism in 2024 was June, when the occupancy rate for hotel rooms across the city was almost 76 percent. With occupancy rates at their highest, the month grew by about 8 percent from the previous year. The month with the lowest occupancy rate was January, when only about 44 percent of hotel accommodation capacity was in use. This was about 3 percent more than in January of the previous year. A five-year review shows that the highest occupancy rate was in 2019, when the average occupancy rate was 85 percent in the busiest month and around 65 percent in the quietest month. The average occupancy rate has remained low in recent years due to new hotel investments and the resulting increase in hotel capacity. A significantly higher occupancy rate is desirable in terms of the profitability of Helsinki hotels.⁹

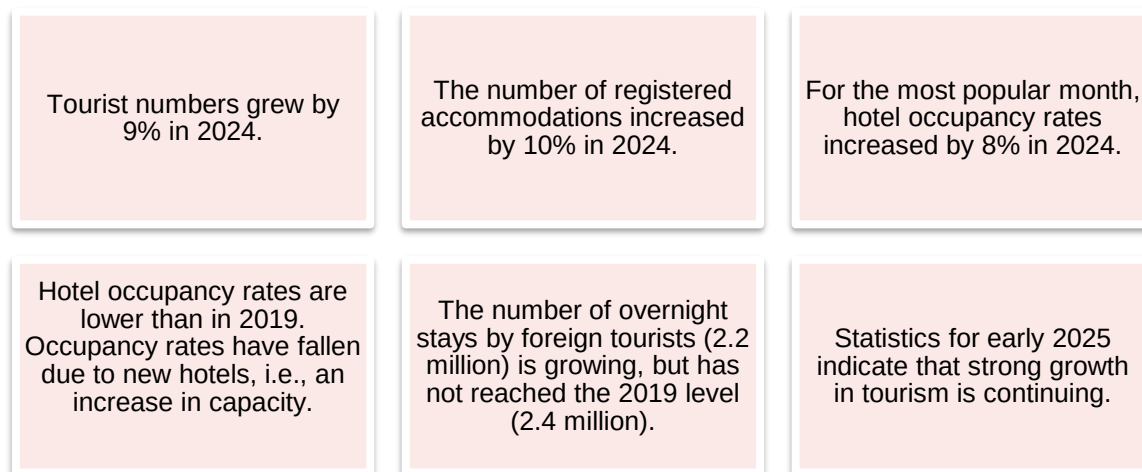


Figure 1: Key figures for tourist volumes in 2024

Visitor intensity

One way to alleviate the social pressure caused by tourism is to reduce the seasonality of tourist destinations and promote a more even distribution of tourists throughout the year. In Helsinki, the seasonal dependency ratio comparing summer and winter seasons is 0.6, indicating a slight emphasis on summer. A ratio of 0.5 would reflect perfect seasonal balance.¹⁰

The Gini coefficient describes the seasonality of tourism in terms of registered overnight stays. The Gini coefficient ranges from 0 to 1. The closer the result is to zero, the more evenly the overnight stays are distributed across the different months. For Helsinki, the Gini coefficient is 0.13 (2024)¹¹. By comparison, Lapland scores 0.30 and Åland 0.53, indicating significantly higher seasonality.

	Helsinki	Lapland	Åland
Gini coefficient for monthly variation in overnight stays	0,13	0,30	0,53

Source: Visit Finland - Vuosittaiset yöpymiset ja saapuneet asuinmaittain

During the pandemic years, tourism was initially clearly more concentrated in the winter months (2020) and then significantly more concentrated in the summer months (2021), as winter tourism remained weaker than previously. Seasonal dependency has not fully returned to 2019 levels. When comparing the figures for 2024 and 2023, no significant changes in seasonality can be observed. It is important to monitor the development of seasonality in the future and to actively implement measures that promote a more even distribution of tourism throughout the year.

Tourist density in Helsinki — calculated as the average number of overnight tourists per day per km² — was 58 citywide in 2024. In Helsinki, tourist density during the peak season (July) was 82. During the lowest month (January), tourist density was 40. Tourist density during the highest

9 Visit Finland. (2025). [Majoitusliikkeiden kuukausittainen kapasiteetti ja sen käyttö, 1995M01-2025M03*](#)

10 Business Helsinki. (2025). [Sustainable Tourism in Helsinki: Seasonal Concentration](#)

11 Visit Finland. (2025). [Vuosittaiset yöpymiset ja saapuneet asuinmaittain, 1995–2025](#)

month increased by 9 percent from 2023. Compared to 2019, tourist density during the summer season has also increased. However, tourist density during the lowest month has not recovered from the decline during the coronavirus pandemic and remains 16 percent lower than in 2019. In Berlin, tourist density in the peak month was 107 (2023) and in Brussels 134 (2023). Tourist density in Helsinki therefore remains low compared to other European capitals.

Tourist intensity, i.e., overnight stays in accommodation establishments per 100 permanent residents per day, was 2.19 in Helsinki during the summer months and 1.48 during the winter months¹². As with tourist density, tourist intensity during the summer season has returned to pre-coronavirus levels. During the winter season, however, tourist intensity is still 7 percent lower than in 2019.

The average tourist intensity for the whole year was 1.82^{13,14}. In Barcelona, where overtourism has become a topic of discussion, the corresponding figure for the whole year was 6.01¹⁵, and in Reykjavik it was 7.00¹⁶. In smaller destinations, this figure can exceed 100¹⁷. Thus, in terms of the number of tourists in relation to residents, Helsinki is still far from the most congested capitals in terms of tourism.

Extending the length of stay can help balance visitor intensity and increase tourism revenue per visitor. Longer stays allow for broader exploration beyond central attractions, potentially distributing visitor impact and benefits more evenly. In 2024, the average length of stay in Helsinki was 1.7 days¹⁸, and 3 days for international visitors¹⁹ – roughly unchanged from 2019.



Figure 2: Highlights from 2024 regarding tourism intensity

Short-Term Rentals

Nowadays, in addition to traditional accommodation services, travelers can also rent apartments for short periods through international online platforms such as Airbnb and Booking.com. Short-term accommodation in residential properties has attracted investors and professional accommodation providers. In some travel destinations, the growth of short-term professional rentals has raised property prices and housing costs in the area. If housing costs increase significantly and locals feel that they can no longer afford to pay rent or buy a home at the previous price level, resistance may arise.

The adverse effects of short-term rentals also include noise and littering caused by tourists, as well as unauthorized accommodation, i.e., apartments intended for residential use being rented

12 Visit Finland. (2025). [Visit Finland majoitustilastot, 116u -- Matkailusesonkien yöpymiset ja saapuneet asuinmaittain, 1996–2025](#)

13 StatFin. (2025). [Väestörakenne, 11ra – Tunnuslukuja väestöalueittain 1990–2024](#).

14 Helsingin kaupunki. (2025). [DataLokki – Helsinki Destination Insights](#)

15 [Barcelonan matkailijatilastojen mukaan kaupungissa rekisteröitiin \(vuonna 2024\) 37 362 481 yöpymistä](#).

16 Statistics Iceland. (2025). [www.statice.is/](#)

17 Helsingin Sanomat. (2025). [Euroopan "pahin paikka" turisteille on brittijärjestön mukaan Zákyntosin saari](#).

18 Visit Finland. (2025). [Vuositteiset yöpymiset ja saapuneet asuinmaittain, 1995-2025](#)

19 Visit Finland. (2025). [Matkailijamittari: Keskimääräinen viipymä Helsingissä 2024](#).

out on a short-term basis like hotels. Hotels may also oppose the phenomenon if it undermines the profitability of hotel operations.

Short-term rentals are regulated in different ways across Europe, for example by limiting the rental period to a maximum of 90 days per year. London, Dublin, Amsterdam, and Paris have set limits on the annual short-term rental of apartments, and in Berlin, short-term rentals are completely prohibited²⁰. Eurocities, of which Helsinki is a member, has recommended that short-term rentals be subject to regulations that balance supply and demand. In Finland, too, the government has been asked to introduce rules for short-term rentals²¹, and a [new law on short-term rentals](#) is currently being drafted²².

The capacity of short-term rental apartments offered through international platforms (Airbnb, Booking.com, etc.) is growing rapidly in Helsinki. Statistical data on the number of beds reported for short-term rentals during the year is available starting from the year 2022. The average capacity for short-term rentals in terms of beds was 12,642 in 2024. Capacity has grown by approximately 17 percent since 2023 (10,827) and by as much as 57 percent since 2022 (8,056)²³. Short-term rentals made through international platforms totaled 716,370 overnight stays in 2023. Overnight stays increased by as much as 33 percent from 2022, but the figure has not yet reached the 2019 level (756,169)²⁴. The capacity for short-term rentals offered through international platforms and actual bookings are therefore growing rapidly.

The rent per square meter for privately financed rental apartments has risen by 6 percent from 2019 to 2024 and by approximately 1 percent from 2023 to 2024²⁵. It is worth examining whether the demand for and supply of short-term rental apartments affect rental levels in Helsinki, even though the number of short-term rental apartments has not yet returned to 2019 levels.

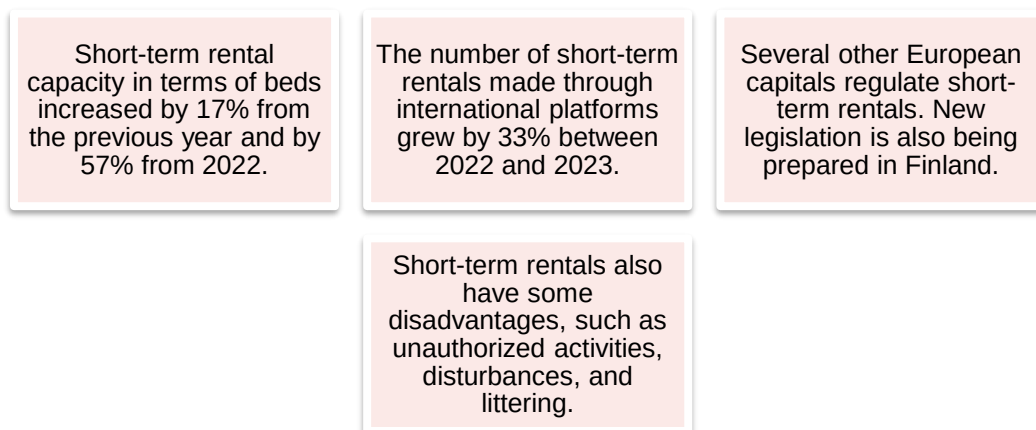


Figure 3: Highlights from 2024 regarding short-term rental

Economic Perspectives

Tourism's direct revenue in 2023 was approximately €1.5 billion — a 25% increase from 2022, although still below the 2018 level of €1.7 billion. Per capita, tourism income amounted to €2,255 in 2023, €300 less than in 2019. Tourism accounted for 2.35% of total employment in 2023, compared to 3.10% before the pandemic.²⁶

20 Cities Today. (2024). [Barcelona set to ban short-term rentals](#).

21 Yle uutiset. (2024). [Rovaniemäläiset marssivat matkailun kasvua vastaan: "Kaupunki kuolee turismin alta", sanoo poismuuttoa harkitseva](#).

22 Lausuntopalvelu. (2025). [Luonnos hallituksen esitykseksi rakentamislain muuttamisesta VN/819/2025](#)

23 Helsingin kaupunki. (2025). Kansainvälisten alustojen kautta tarjolla oleva lyhytaikainen majoituskapasiteetti.

24 Tilastokeskus. (2025). [Kansainvälisten alustojen kautta varattu lyhytaikainen majoittuminen Suomessa kunnittain ja vuosittain, 2018–2023](#)

25 Tilastokeskus. (2024). [Tilastokeskus - Vapaarahoitteisten vuokra-asuntojen neliövuokrien jakaumat suurissa kaupungeissa, neljänneksittäin, 2018Q1–2024Q4](#).

26 Helsingin kaupunki. (2023). [Matkailun tulo- ja työllisyysvaikutukset](#)

In 2024, the average price for a hotel room in the peak month was €142 (+1.7% year-over-year), while the lowest monthly price (March) was €114 — unchanged from the previous year. In 2019, peak prices averaged €148.²⁷ Increased hotel capacity has kept prices and occupancy rates moderate.

Rising prices can create dissatisfaction among both residents and tourists. Residents may perceive tourism as a driver of inflation, while tourists may feel the destination isn't worth the cost. Nationally, consumer prices for restaurants and hotels rose 20% from 2019 to 2024 and 3% from 2023 to 2024²⁸.

The City Cost Barometer compares travel costs in European cities by collecting price levels for the same services that travelers commonly use. The price level of travel costs in Helsinki decreased by 20.2 percent from 2024 to 2025, and the city's ranking in the barometer rose from 34th place (2024) to 21st place (2025). The biggest change in price levels occurred in accommodation, which decreased by 38 percent from 2024 to 2025. Helsinki's restaurant services are among the most expensive in Europe, and Helsinki ranked fifth in terms of the most expensive restaurant meals. In 2025, Helsinki is the cheapest Nordic city in terms of travel costs. Stockholm ranks 27th, while Copenhagen (37th) and Oslo (38th) are the most expensive destinations in the comparison. All of the Baltic capitals and many other Eastern European cities are among the 20 cheapest cities.²⁹

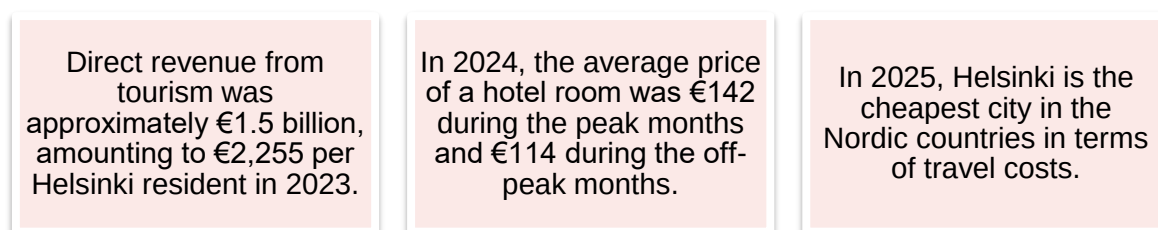


Figure 4: Highlights from 2024 economic perspectives

Safety

A perception of safety is important for both residents and tourists. Finland has traditionally been a safe travel destination. Helsinki's disturbance index, i.e., crimes committed in public places in relation to the population, has risen by almost 50 percent since 2021 (147.9), when the number of tourists was also low. However, crime has decreased by about 12 percent from 2023 (247) to 2024 (218). In 2025, 74 percent of residents perceived Helsinki as safe, which is 4 percent more than in 2023. The sense of personal safety is measured by the social progress index. Statistical data on the situation in Helsinki is available from 2022 onwards. At that time, Helsinki scored 87 points on a scale of 0–100. Its ranking in the index has since risen, with the best ranking achieved in 2024 with 94 points.³⁰

When asked in a survey of event visitors in Helsinki, “How safe did you feel in Helsinki during the event?”, as many as 97 percent of the more than 49,000 respondents, i.e. event visitors, felt that Helsinki was very or fairly safe during events³¹. Overall, indicators suggest that Helsinki remains a safe city for both residents and tourists. As tourism grows, it will remain important to monitor and prevent crime and disruptive behavior.

27 Visit Finland. (2025). [Majoitusliikkeiden kuukausittainen kapasiteetti ja sen käyttö, 1995M01-2025M03*](#).

28 Tilastokeskus. (2025). [Kuluttajahintaindeksi 2015 = 100 hyödykeryhmittäin](#).

29 Post Office. (2025). [City Costs Barometer 2025](#), [City Costs Barometer 2024](#) ja [City Costs Barometer 2023](#)

30 Business Helsinki. (2025). [Sustainable Tourism in Helsinki. Tourism and Event Safety Monitoring Indexes in Helsinki](#).

31 Helsingin kaupunki. (2024). Helsingin tapahtumien kävijäkysely 2024

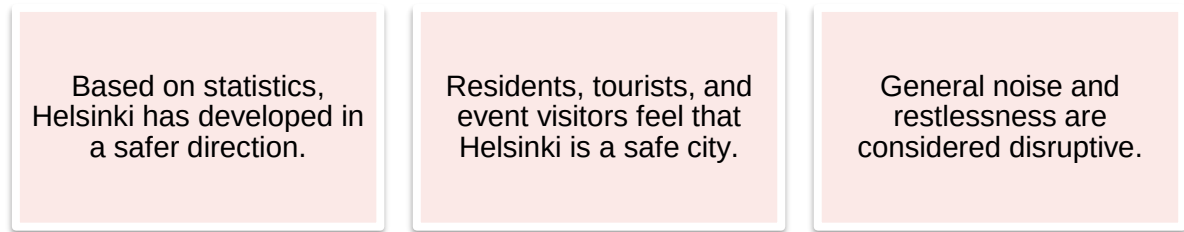


Figure 5: Highlights from 2024 safety perspectives

Resident Satisfaction

According to Helsinki's 2025 [resident survey](#) 69% of respondents view the impacts of tourism positively³². Although this is a slight decline since 2021, residents especially appreciate the economic benefits of tourism and its positive impact on cultural and recreational services.

Nearly three-quarters of respondents believe the city should actively attract more tourists, while 10% oppose further growth. Residents' attitudes have remained stable since 2019.

However, negative views have increased: 13% of respondents (up 3 percentage points from 2023) believe the city is developing undesirably as a tourism destination, and 10% (up 5 percentage points) report frequent or significant disturbance due to tourism. Main concerns include littering, crowding, noise, lack of peace, and traffic congestion.

This decline in satisfaction indicates increasing social pressure from tourism. Monitoring resident satisfaction and addressing emerging concerns will be important moving forward.

Tourist Satisfaction

Tourist satisfaction in Helsinki is assessed through regular visitor surveys. These surveys do not currently measure perceived crowding, which could affect the visitor experience. While the willingness of tourists to recommend Helsinki has slightly declined, the overall level remains good³³. The Net Promoter Score (NPS) for Helsinki's events remains high³⁴.

Sentiment scores, which assess online reviews and emotional tone across platforms like Booking.com, Tripadvisor, and Google, show a strong performance. Helsinki has performed well during the five-year review period, and its ranking has risen slightly in recent years. The best result (86.2) was achieved in 2024. Tourists have therefore been satisfied as tourism has grown.³⁵

Media coverage of tourism in Helsinki has been more positive than negative³⁶. Tourists often praised the city in media highlights. However, businesses and their representatives were the most visible actors in tourism-related media, frequently advocating for increased visitor numbers.

32 Helsingin kaupunki. (2025). [Helsingin matkailu – asukaskysely 2025](#).

33 Helsingin kaupunki. (2024). Helsingin matkailu – matkailijakysely 2024

34 Helsingin kaupunki. (2024). Helsingin tapahtumien kävijäkysely 2024

35 DataAppeal. (2025). Sentiment Score eli tunnetilapisteytys

36 Retriever. (2025). Julkisuusanalyysi: Helsingin matkailu 18.12.2023-31.10.2024

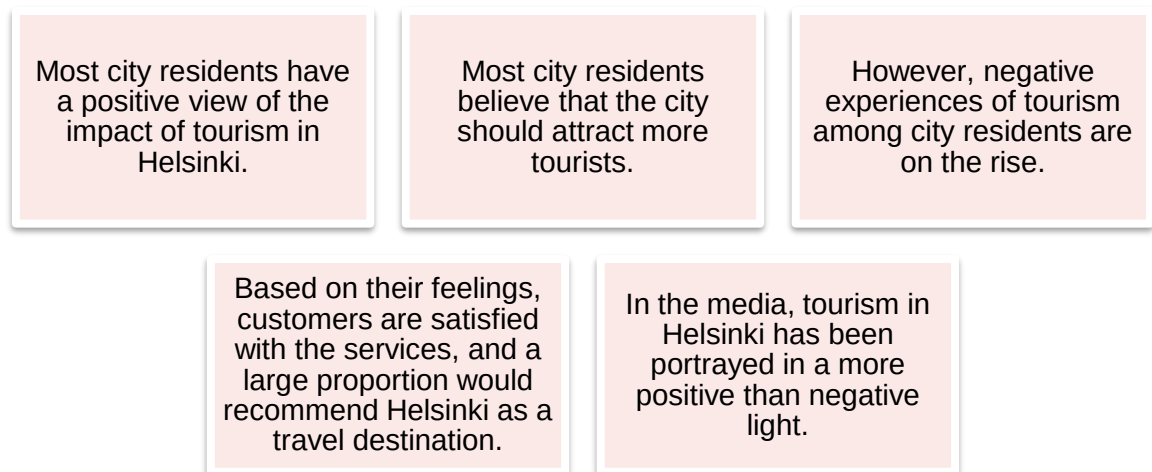


Figure 6: Highlights from 2024 tourist and resident satisfaction



Photo: Vesa Laitinen

Summary and Conclusions

Tourist numbers in Helsinki are increasing, but the city is not currently experiencing significant social tourism pressure. Hotel occupancy rates should still be improved during both peak and low seasons. Compared to other destinations, Helsinki exhibits low seasonality, with visitor flows relatively evenly distributed throughout the year.

While overtourism is not evident, occasional crowding can occur during specific events, cruise ship arrivals, or at popular attractions. Crowding becomes a problem when it leads to dissatisfaction among residents and visitors. For this reason, proactive monitoring, guidance, and regulation are essential to sustain tourism growth in a socially sustainable way.

As tourism increases, it is important to ensure that it does not lead to rising service or housing costs for city residents. While price increases can result from many factors, any rapid rise in prices should be examined in relation to tourism.

Short-term rental supply and demand through international platforms such as Airbnb and Booking.com are growing in Helsinki. This trend should be monitored in the coming years. Finland is preparing new legislation on short-term rentals, and many major European cities have already introduced city-specific restrictions and regulations on such rentals.

According to a media analysis of domestic coverage of tourism in Helsinki, nearly one-third of the news was positive, around 60% neutral, and only 11% negative. The share of positive coverage increased compared to 2023, mainly consisting of tourists' praise. Negative news did not relate to overtourism issues such as prices or congestion, but rather to Helsinki's weaker tourism performance compared to other Nordic capitals. Some reports called for more investment in tourism marketing, while Helsinki was also praised for its focus on sustainable tourism.

The management model developed for Helsinki includes roughly 40 indicators and outlines concrete measures to address rising pressure. These include:

- Reducing seasonality and promoting year-round tourism.
- Using traffic data to identify and prevent congestion.
- Increasing awareness of peak times among residents and tourists.
- Regulating short-term rentals and addressing unauthorized operations.
- Training destination staff and guides to manage visitor behavior.
- Maintaining urban cleanliness.
- Engaging residents in tourism planning and feedback.
- Enabling residents to report disruptive tourism activities more efficiently
- Monitoring the development of short-term rentals and responding accordingly.
- Maximizing direct and indirect economic benefits from tourism.
- Advancing regenerative tourism strategies in Helsinki.

Tourism has significant global and local environmental and climate impacts, which were not addressed in this report but have been comprehensively covered in the *Tourism Impact Assessment Sheet*.

The developed model for managing social tourism pressure complements Helsinki's sustainable tourism management system and serves as an example for other domestic and international destinations.

The indicators of social tourism pressure are monitored annually. Any negative changes will be addressed through targeted actions to restore balance. Special attention is given to residents' attitudes toward tourism and tourist satisfaction—if these indicators decline, other metrics can help identify the causes.

Helsinki 6.6.2025

Helsinki

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