



Visit Finland

State of Sustainable Tourism

2023



**SUSTAINABLE
TRAVEL
FINLAND™**



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**SUSTAINABLE
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FOREWORD

Sustainability as a driver of change in the tourism sector

In the early stages of the STF programme in 2018, we already noted that sustainability would become an obligation. One of the goals at the time was to prepare the tourism sector for this: to provide tourism operators with a systematic path to adopt practices that are in line with sustainable development.

And the operating environment has indeed changed. For example, the Corporate Sustainability Due Diligence Directive, the sustainability reporting obligation and the Green Claims Directive already affect the tourism sector, either directly or through the value chain. Partners, financiers and investors are demanding sustainability actions. In order to fulfil the obligations, sustainability data is needed.

Fortunately, the industry's sustainability expertise has improved rapidly. While we discussed recycling challenges in 2018, people now use terms such as double materiality assessment, life cycle carbon footprint, nature positivity and inclusion casually when discussing tourism. Sustainability requirements are becoming stricter, but Finnish tourism companies are jointly prepared for the change. And they have accumulated data too!

One of the stumbling blocks to sustainable tourism in Finland has been the lack of communication. In fact, Finland has even succumbed to greenwashing, that is, the refusal to publish sustainability figures. Companies take action but remain silent about it. The Greenwashing Directive has made the phenomenon more common again. Let's not backpedal on the path of sustainable tourism that has begun so successfully!

Sustainable tourism is a great growth opportunity, and STF-labelled tourism companies are proven to promote sustainable tourism. Without communication, however, companies will miss significant business opportunities. In corporate social responsibility communication, as in all responsibility work, the focus should be on essential impacts. Actions taken and communicating about them should be measurable, verifiable, transparent, goal-oriented and take place on the right scale. This discourages greenwashing while encouraging effective sustainability work and communication.

Over the next few years, communication will inevitably change. Expressions such as carbon neutral or environmentally friendly are already under the magnifying glass. In this report, we analyse the data generated by the STF programme. These are not green claims; these are

facts. When this report uses the term 'carbon neutral', it refers to global and national carbon neutrality targets. After all, we cannot escape using the terms and targets included in frameworks such as the Finnish Climate Act.

The State of Sustainable Tourism 2023 report highlights that we have surpassed planetary boundaries while the climate actions by tourism companies still remain limited. This information is extremely important for the development of tourism. During 2024, the STF programme will take a significant leap towards better consideration of biodiversity. It will provide tourism operators with more systematic tools for taking biodiversity into account as well as protecting and restoring it. After all, nature is the most important asset of our tourism sector. It is important that we side with climate actions instead of biodiversity loss so that future generations will have an opportunity to travel, too.

In sustainability work related to tourism, the recognised skeleton in the closet is transport.

Over the past few years, we have invested in tools such as the Border Survey, which can be used to determine a tourist's carbon footprint and carbon efficiency by market of origin, and the Hiilikuri Tourism CO₂ calculator, which tourism companies can use to calculate their carbon footprint. These tools have helped us identify the most significant sources of emissions from tourism, and they help tourism operators make decisions that have an impact on the climate.

However, there is no denying that it is very difficult to arrive in Finland by low-emission means of transport. An average train journey from European capitals takes seven times longer than travel by air and involves many changes, while working out the route and making reservations also requires certain expertise and dedication. Tourists, tourism operators and those working in tourism must not be left alone with this challenge. Our tourism sector is dependent on the development of low-carbon modes of transport and simple travel chains.

Our emission intensity has certainly decreased from 2022, but it still exceeds the EU level. This decrease is hardly due to successfully reducing emissions from tourism but most likely the consequence of the disappearance of long-haul markets. The long-haul markets were first hit by the pandemic and now by the Russian war of aggression. They have been replaced by European tourists, and as a result, average flight distances are shorter and the emissions are lower, although emissions per kilometre from short flights are higher than from long-haul flights.

According to the Border Survey, the carbon efficiency of the EU-28 countries (EUR/CO₂) is 2.14 compared to 1.51 and 1.13 in Asia and America. However, from a sustainability perspective, the choice of markets of origin cannot rely on emissions and consumption alone. It is also necessary to consider factors such as the length of stay and the distribution of tourists throughout Finland and throughout the year. Although emissions from transport are perhaps the largest emissions challenge for our industry, a positive development in terms of the sustainability of tourism is the increased interest in slow tourism and travel by land.

Regenerative tourism also inspires positive curiosity. Regenerative tourism challenges tourism operators to approach the development of a destination in a completely new way. The focus shifts to the local environment and community and the question is how to build the destination into a better place to live and visit using tourism as a tool. In the next few years, regenerative tourism may create completely new kinds of indicators for measuring the success of tourism.

Understandably, regenerative tourism also raises many questions, and it may even be difficult to grasp the meaning of the concept. It is not necessary to change tack all at once, as long as we remember that openness to new kinds of thinking enables change. We are all locals in one destination or another. Wouldn't it be great if the ecosystem of our hometown could flourish, develop, recover and thrive with the help of tourism?

Liisa Kokkarinen
Head of Sustainable Development
Visit Finland

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Manager, Sustainable Travel Development
Visit Finland





1180

COMPANIES PARTICIPATING STF PROGRAM¹

Environmental actions by companies in the STF programme



99% actively participate in actions to mitigate climate change²



49% measure carbon footprint²



41% participate in actions to protect biodiversity²



62% make sustainable choices in catering²



90% work to reduce water consumption²



69% share of renewable energy in total energy consumption²

9%

OF AREA COVERED BY NATURE RESERVES AND NATIONAL PARKS⁴

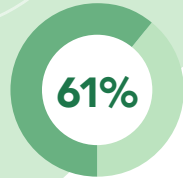
387

COMPANIES WITH VALID STF LABEL¹

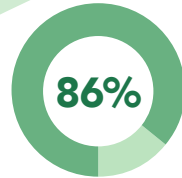
65

DESTINATIONS PARTICIPATING STF PROGRAM¹

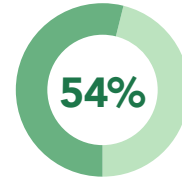
Stakeholder satisfaction



61% of employees feel comfortable in their work³



86% of employees are satisfied with their work community³



54% of employees are considering switching their field³

32%

SHARE OF SEASONAL WORKERS AMONG EMPLOYEES¹

1472

NATIONALLY SIGNIFICANT BUILT CULTURAL ENVIRONMENT⁵

- 1. STF HUB
- 2. STF Indicator survey 2023
- 3. PAM Member survey 2023
- 4. Metsähallitus, Statistics Finland
- 5. National Board of Antiquities

Sustainable Tourism in Finland 2023

Summary

We depend on nature to provide us with our energy, food and raw materials. At present, the tourism sector consumes natural resources and accelerates climate change. In addition to the climate goals of tourism, we should look at all planetary boundaries. Planetary boundaries are a framework defined by a team of researchers in 2009 that includes nine areas central to our existence. If the boundaries are crossed, the Earth's ecosystems will not remain viable for humans or other life forms. The situation is alarming, as according to the latest update, six of the nine planetary boundaries have been crossed.

Climate change and extreme weather phenomena already affect tourism. Extreme weather phenomena such as heavy rains, extreme heat and melting glaciers are changing the conditions for tourism and posing challenges for many popular destinations. For example, ski resorts in the Alps have already experienced a shortening of

the ski season and a decrease in snow amounts. Extreme heat and wildfires already affect summer tourism in Europe and beyond. In Finland, climate change has a particular impact on winter tourism, which is dependent on snow and ice. As the amount of snow decreases, ski resorts need artificial snow, which increases energy consumption.

In the Glasgow Declaration, tourism operators commit to reducing emissions and aim for net-zero emissions by 2050. The signatories of the Glasgow Declaration commit to publishing their own emission reduction pathways, which include the following steps: measure, decarbonise, regenerate, collaborate and finance. By April 2024, the declaration had been signed by 71 Finnish tourism operators. In Finland, Visit Finland has drawn up its Climate Action Plan, which includes a total of 4 focus areas and 20 main objectives, divided into 163 actions.

Tourism should create social and cultural value and provide opportunities for local communities to participate and benefit from these. Tourism companies have taken measures to promote socio-cultural sustainability, but measuring their impact is more challenging than measuring the economic and ecological impacts. When destinations and tourism companies increase inclusion, society becomes more accessible for everyone, which reduces inequality at the level of the individual.

The concept of regenerative tourism has emerged alongside sustainable tourism. Regenerative tourism emphasises holistic system thinking and people's relationship with themselves, each other and the environment. The goal of regenerative tourism is to provide tourists with unique experiences while improving the destination from the perspective of the environment and local community. The purpose of regener-

ative tourism is not to reduce revenue, but to improve productivity and the management of the destination through creative solutions and collaboration. It also measures the impact of tourism diversely, such as by how tourism preserves and restores nature.

At the end of 2023, a total of 1,180 Finnish tourism companies had joined the Sustainable Travel Finland (STF) programme, representing a 25% increase compared to the previous year. Of these companies, 387 had received the STF label, an increase of 77% from the previous year. In 2023, the programme also included 65 destinations, of which three new destinations – Puumala, Savonlinna and Tahko – received the STF label. One of the objectives of the programme is to strengthen the measurement of the sustainability performance of the participants and the industry as a whole. In order to improve the quality of data, it would be important for the industry to participate more actively in the collection of industry data.

The year-round availability of accommodation establishments increased by 17%, and up to 84% of the accommodation establishments were already operating all year round. Lower seasonality is a positive trend, as it levels out tourism flows and distributes economic impacts more evenly throughout the year. Finnish tourism companies are among the most active users of social media in the EU. This helps with marketing and can contribute to more responsible travelling habits.

The Finnish tourism sector has faced financial challenges in the early 2020s, and in 2023, the industry reached a 95% recovery rate compared to 2019. Finland's recovery rate is in line with the EU average, but it remains weaker than in the other Nordic countries. In 2023, the number of overnight stays in accommodation establishments increased by 35% compared to the previous year. The number of foreign tourists increased after the Covid-19 pandemic, but it is still far from the EU average. However, the Finnish tourism sector has diversified and its dependence on the larg-

est countries of origin has decreased, which has helped the industry to cope through the difficult times.

Between 2021 and 2024, the EU's Recovery and Resilience Facility (RRF) has provided significant additional funding for measures to develop sustainable and digital growth in the tourism sector. Finland's recovery and resilience plan is part of the Sustainable Growth Programme, and Visit Finland is responsible for development measures concerning sustainable and digital growth in the tourism sector. Despite the recovery from the pandemic, however, we are entering a completely new era, as Visit Finland's resources have diminished significantly due to a considerable cut in Visit Finland's basic budget and the end of the RRF period after 2024. At the same time, international responsibility obligations are becoming stricter, and national direction is perhaps more necessary than ever. Time will tell whether similar funding opportunities will continue to emerge or whether tourism will have to adapt permanently to smaller-scale sustainability activities.

Introduction

You are reading the annual **State of Sustainable Tourism 2023** report, which is the second of its kind. The report is published by Visit Finland in collaboration with Sitowise Oy.

The first **State of Sustainable Tourism 2022** report was published in spring 2023. The first report provided a broad background to the sustainable tourism framework internationally and domestically. For the first time, the STF programme's indicator data, other statistics, research sources, expert views and concrete sustainable tourism examples from the Finnish tourism sector were compiled into a single report.

In the second annual report, we present planetary boundaries, net-zero emissions goals and regenerative tourism as topical themes for sustainable tourism. With regard to indicator data, we can already draw more comparisons with the previous year.

The purpose of the annual report is to promote sustainable tourism. The tourism sector is dependent on a healthy operating environment, and it is influenced by global as well as local economic, ecological and socio-cultural phenomena and crises. Now and in the future, the health of the industry can be guaranteed by sustainable tourism. To kick off the transformation of the industry into a sustainable one and make progress, the change has to come first and foremost from within the industry, from tourism companies and from tourists. Pressure from the external operating environment alone is not sufficient. The industry itself also has to develop, and the **Sustainable Travel Finland** programme developed by Visit Finland together with the tourism sector strongly promotes this.

The aim of Finland's national tourism strategy (2022–2028) is to make Finland the most sustainably growing tourist destination out of the

Nordic countries. Similarly, Visit Finland's strategy for 2021–2025 focuses on economic growth, sustainable development and competitiveness.

National sustainable tourism indicators are a key part of the Sustainable Travel Finland programme. The purpose of the indicator system is to monitor the sustainability trends of the industry. Measuring is also an essential part of the sustainability management of destinations and companies.

Visit Finland's strategy focuses on economic growth, sustainable development and competitiveness.

The STF programme collects data for sustainable tourism indicators from tourism companies and destinations. The data is collected annually, and filling in the indicator form is mandatory for all companies that have received or are applying for the STF label.

The sources of the national sustainable tourism indicators are:

- STF statistics
(partly from data collected with indicator forms)
- STF Hub (STF programme's digital service)
- Visit Finland's statistics service Rudolf
- Visit Finland's Border Survey
(an interview survey at Finnish borders)
- The Finnish Heritage Agency
- Metsähallitus
- Statistics Finland
- Unesco
- Council of Europe

The annual report has also been supplemented by other statistics from the same sources and the EU tourism statistics.

In 2023, the indicator form was completed by 322 business respondents and 19 destination respondents.



PHOTO: JULIA KIVELÄ

Tourism within planetary boundaries

Planetary boundaries are a framework published by a research group in the Stockholm Resilience Center in 2009, which has been updated several times and which aims to increase understanding of humanity's impact on the planet on a global scale. Planetary boundaries are critical to our existence, and if they are crossed, the Earth's ecosystems will not remain viable for humans or other life forms. The most recent update of the planetary boundaries is from September 2023, when a team of researchers defined all the processes that regulate the stability and resilience of the Earth for the first time.^{1,2}

Planetary boundaries comprise nine subdivisions: biogeochemical flows of nitrogen and phosphorus, novel chemicals and life forms, climate change, ozone depletion in the upper atmosphere, atmospheric aerosol pollution, ocean acidification, land-system change, freshwater use and biodiversity loss. In terms of biosphere

integrity, both genetic and functional integrity are monitored. Out of these, genetic integrity describes biodiversity and functional integrity describes the flow of energy produced by photosynthesis and materials into the biosphere. In the area of climate change, the monitored factors are radiative forcing and the concentration of carbon dioxide in the atmosphere. In the area of fresh water consumption, both blue water (i.e. surface water and groundwater) and green water (i.e. water usable by plants) are monitored. The area of novel chemicals and life forms, in turn, comprises chemicals, substances and life forms released by humans into nature that would not exist without our influence. These include microplastics, pollutants, nuclear waste and genetically modified organisms, for example.³

When the planetary boundaries were published in 2009, three boundaries had been crossed. When the concept was updated in 2015, four

boundaries had been crossed. In the latest update, six of the nine boundaries have been crossed. In the latest study, the risk level of planetary boundaries was found to increase in all areas except for ozone depletion.^{4,5}

Surpassing planetary boundaries increases the risk of large-scale, sudden and irreversible environmental changes. Together, the boundaries form a threshold beyond which risks increase for both us humans and the ecosystems in which we live.⁶ Because planetary boundaries are complex processes that interact with each another, focusing on climate change alone, for example, is not sufficient in terms of increasing sustainability. Instead, it is important to understand the interaction of all planetary boundaries, but especially global warming and biodiversity loss.⁷ These have been identified as the "core boundaries" because significant changes in them would drive the Earth into a new state of being.⁸

Planetary boundaries are critical to our existence.

Planetary boundaries have been taken into account in the Sustainable Development Goals (SDGs) of the UN's 2030 Agenda in terms of combating climate change and land-system change. Therefore, it can be considered that the SDGs contain the planetary boundaries that are in the most critical state in one way or another. However, overall sustainability is only possible when the implementation of the SDGs fits within the planetary boundaries.⁹ However, the scientists who developed the planetary boundaries have suggested that achieving socio-economic sustainable development goals would increase people's ecological footprint. This, in turn, would increase pressure on planetary boundaries and move the world further away from attaining the environmental sustainability goals.¹⁰

IMPACT OF TOURISM ON PLANETARY BOUNDARIES

Global monitoring of the use of natural resources in the tourism sector is limited and comparisons of its effects on planetary boundaries have not been made. As a result, it is challenging to obtain a comprehensive picture of the impact. Researchers have sketched the use of natural resources in the tourism sector with, for example, key figures describing the utilisation rate of services and indicators derived from these, such as the carbon footprint per overnight stay. In addition to the utilisation rate, indicators have been developed for managing the impact of tourism within the planet's ecological limits. Based on this, it has been predicted that the total consumption of natural resources in the tourism sector would increase by 93% for water and 189% for land by 2050 compared to 2010.¹¹

The UN Environment Programme from 2021 also estimates that the resource use of tourism will increase significantly in the future. The programme notes that the use of natural resources is increasing in proportion to solid waste, waste

water, loss of biodiversity and greenhouse gases from tourism. In a business-as-usual scenario for tourism, resource consumption would increase by 154% for energy, 152% for water, 131% for greenhouse gas emissions and up to 251% for solid waste disposal by 2050.¹²

The number of tourists has steadily increased from 25 million in 1950 to a staggering 1.46 billion in 2019. The Covid-19 pandemic caused a dip in the figures, but in 2023, they had recovered almost to the levels preceding the pandemic.¹³ According to a 2019 report by the UNWTO and the International Transport Forum (ITF), emissions from tourism are projected to increase by 25% or more by 2030 from the level of 2016.¹⁴

Taking into account the exponential growth of the tourism sector, emission-intensive travelling habits and increase in resource use, it can be considered that tourism contributes more and more to the crossing of planetary boundaries. In addition to greenhouse gas emissions, the tourism sector should therefore reduce the over-exploitation of natural resources, which has already

led to water shortages, changes in ecosystems, loss of biodiversity and pollution in certain areas.¹⁵

Hotel services, swimming pools and other recreational services, such as theme parks and golf courses, consume water resources, especially in hot and tropical climates. The differences in water use between tourists and locals can be significant. For example, in Spain, tourists consume an average of 450–800 litres of water per day, depending on the season and region, while locals consume about 127 litres of water per day. The water stress caused by tourist destinations is likely to increase in the future as a result of climate change, since rainfall is predicted to decrease in the coming decades in many areas favoured by tourists. These regions include Mediterranean countries and Australia, for example.¹⁶

Tourism also affects land use and biodiversity. The development of recreational tourism in certain coastal regions, for example, often affects coral reefs, which may deteriorate or even be destroyed. Forests are also being felled and wetlands drained to make way for tourist destinations, which affects the ability of the local ecosystem to sequester carbon.¹⁷

Seas also suffer from tourism. In many coastal areas, waste water treatment is inadequate. It is estimated that only 8% of all waste water is processed in treatment plants in low-income countries. Cruise ships discharge significant amounts of untreated waste water into seas, and they are also major polluters. For example, the European operations of the world's largest cruise company, Carnival Corporation, release 10 times more sulphur oxides per year than the 260 million cars in Europe combined. The consequences of sulphur dioxide emissions include ocean acidification and health hazards.¹⁸

CONSIDERATION OF PLANETARY BOUNDARIES IN THE TOURISM SECTOR

The Future of Tourism in the Anthropocene review presents solutions to many problems posed by the tourism sector. It would be important to develop and collect data to mitigate climate change so that all decision-making could be based on evidence. Low- or zero-emission modes of transport should be developed and favoured whenever possible. Tourists should also be directed to take fewer trips that last longer instead of many shorter weekend trips. Furthermore, the development of virtual tourism and artificial intelligence could reduce physical tourism.¹⁹ This, in turn, could generate types of tourism business that have not yet been utilised much.

The problems of land use and over-exploitation of natural resources (e.g. water) in the tourism sector could be reduced by increasing sustainable planning and development work between parties such as local communities, governments and businesses. Bringing circular economy models into the tourism sector and its supply



chains would contribute to staying within planetary boundaries in many areas, not least in terms of land use and natural resources. Nature conservation should also be taken into account in all decision-making, even if it means excluding some destinations from tourism.²⁰

Pollution affects several planetary boundaries from ocean acidification to novel substances and airborne fine particles. In the fight against pollution, the “polluter pays” principle should be reflected in the taxation of the most polluting forms of tourism, and consequently also in their prices. The creation of various ecotaxes and better environmental management and planning of destinations, as well as the development of infrastructure in terms of waste management, would reduce pollution, for example.²¹

At its core, tourism that respects the planetary boundaries means taking into account the preconditions set by nature in all operations. The goal is not only to stay away from the planetary boundaries but to create more living space for

the wellbeing of both nature and people. This is what regenerative tourism is all about: maximising the positive, measurable effects of tourism so that they clearly and verifiably outweigh the disadvantages. Renewable tourism services are already available across Finland, and the service offering is constantly evolving.

Tourism that respects the planetary boundaries means taking into account the preconditions set by nature in all operations.

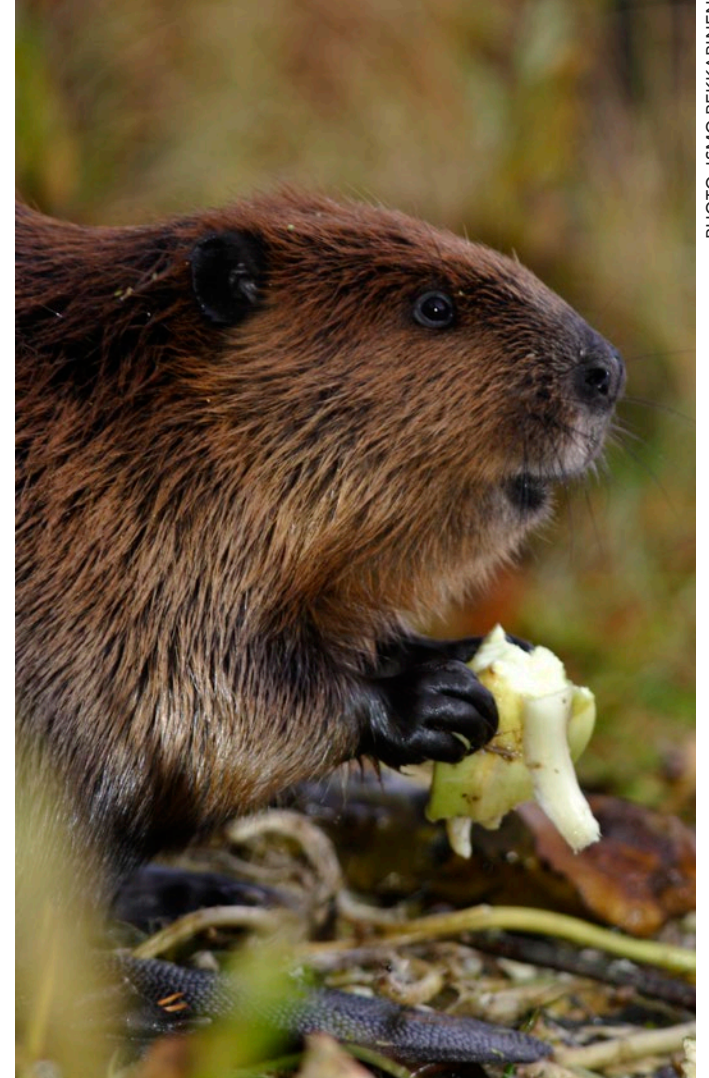
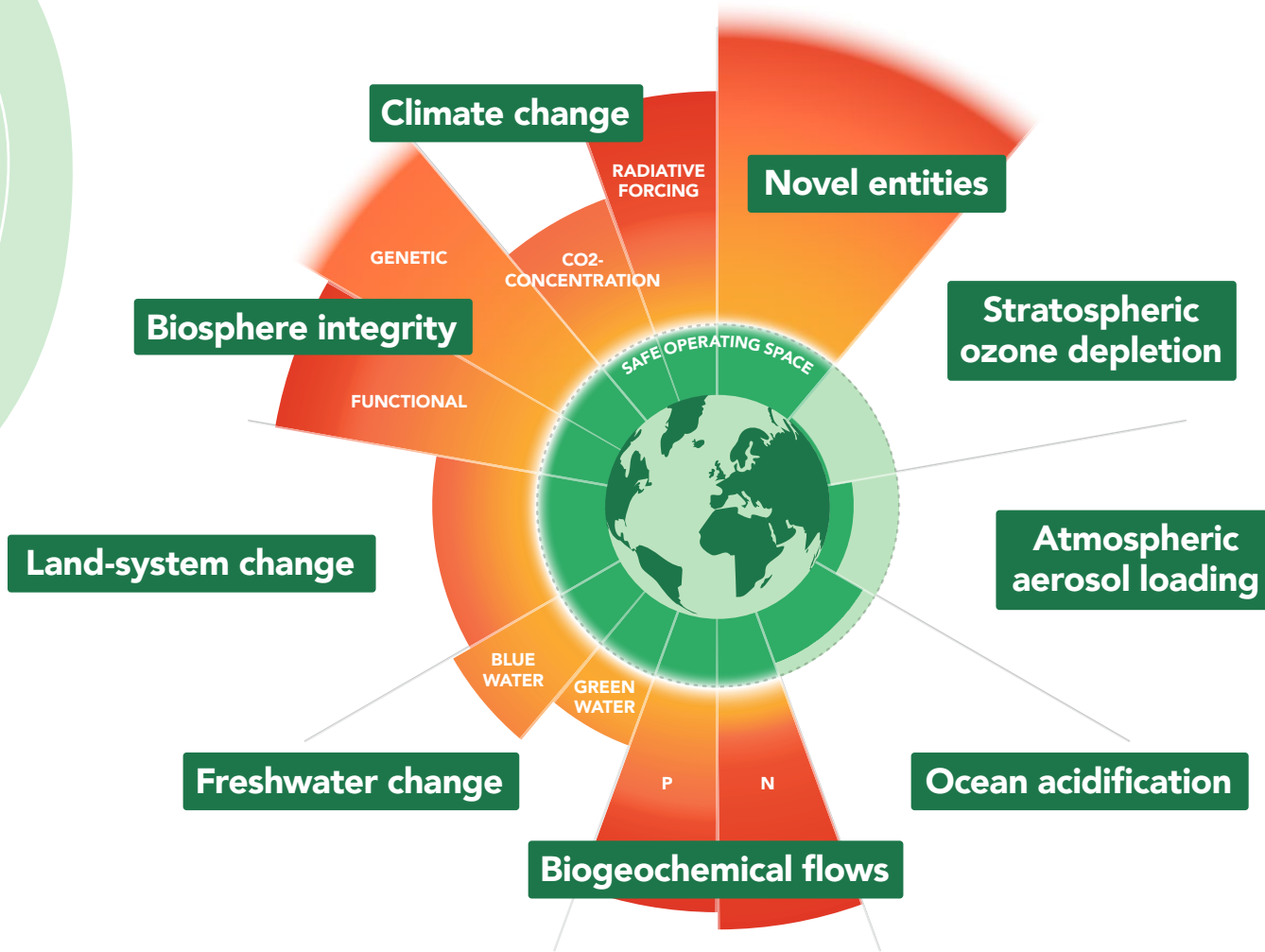


PHOTO: ISMO PEKKARINEN

Credit: Azote for Stockholm Resilience Centre, based on analysis in Richardson et al 2023. Licensed under CC BY-NC-ND 3.0.



Planetary boundaries 2023

Climate change and the rush to net-zero emissions

Climate change causes several extreme weather phenomena, such as heavy rains and extreme heat. The rise in temperatures shortens winter sports seasons around the world and threatens ski resorts in places such as the Alps, where the skiing season has shortened by as much as one month and the depth of snow has decreased by almost ten centimetres over the last 50 years.²²

In many countries around the world, glaciers are also melting at record rates. Glaciers especially in the Alps are vulnerable because they are smaller with relatively little ice cover. If greenhouse gas emissions continue to increase, around 80% of the Alpine ice cap will disappear by 2100. According to the UN Intergovernmental Panel on Climate Change, a large part of the ice will disappear even if we start implementing climate measures now, as so much emissions have already been generated. Melting glaciers also cause dangerous situations for tourists and

locals, and collapsed glaciers have even claimed lives. Some ski resorts try to prevent the melting of glaciers by covering them with white sheets.²³

Sea level rise threatens coastal tourism infrastructure, attractions and even entire countries. In light of current knowledge, small islands in the oceans have the ability to adapt to rising sea levels. This adaptability is influenced by many factors, such as the structure and vegetation of the island.²⁴

Built infrastructure does not have the same ability to adapt to a changing environment. This is why New York City is already sinking due to sea level rise and flooding, for example.²⁵

Extreme heat and increasing wildfires affect summertime tourism in Europe and other parts of the world. For example, many countries favoured by tourists were hit by a severe heat

wave in July 2023. In Greece, the opening hours of the Acropolis were reduced during the hottest times of the day due to the heat.²⁶ In Italy, people were instructed to stay indoors between 11 am and 6 pm due to the heat, and there were also severe heatwaves in the Balkans and Turkey. In California in the United States as well as in China and Japan, temperatures reached over 40 degrees Celsius. Wildfires ravaged La Palma in the Canary Islands, where at least 4,000 people were evacuated due to wildfires.²⁷ In August of the same year, wildfires burned down the historic town of Lahaina on the island of Maui. The fires claimed the lives of more than 100 people, and thousands more lost their homes.^{28,29}

Climate change causes several extreme weather phenomena, such as heavy rains and extreme heat.

Climate change also affects tourism in Finland. In particular, tourism in northern Finland is focused on winter, so it is highly dependent on snow. Lapland's status as a winter destination may improve in relation to southern ski resorts and internationally, as climate change shortens the snow season further south and Lapland's winters may have a relatively more secure snow situation. As the amount of snow decreases, skiing increasingly requires artificial snow, which in turn increases energy use and thus costs. Sea and inland waters will also freeze for shorter periods of time, and in fact, sea ice is now classified as an endangered habitat type in Finland. The deterioration of the ice situation will affect activities such as ice fishing and the maintenance of winter routes, and their safety will require more attention.^{30,31}

The Glasgow Declaration on Climate Action in Tourism aims to reduce tourism emissions by 50% by 2030.

Finnish summer weather is also becoming more unstable. Droughts will become more frequent and, on the other hand, extreme rainfall will become more common.³² However, Finland's attractiveness as a summer tourist destination may improve in relation to more southern countries, in which heat, droughts and scarcity of clean water will become an ever-increasing problem.³³

THE GLASGOW DECLARATION

The importance of tourism as a factor in achieving climate goals was examined in the climate conference held in Glasgow in 2021. The United Nations World Tourism Organization (UNWTO) prepared the Glasgow Declaration on Climate Action in Tourism for the conference, setting out measures to reduce tourism emissions by 50% by 2030 and to achieve net-zero emissions as soon as possible, but no later than by 2050. The declaration also commits to harmonising efforts in this area based on the latest scientific recommendations aimed at limiting global warming to no more than 1.5°C above pre-industrial levels.³⁴

The signatories of the Glasgow Declaration commit to publishing their own climate action plans and to report on its progress annually. The action plans are based on the five emission reduction pathways set out in the Glasgow Declaration: measure, decarbonise, regenerate, collaborate and finance.³⁵ Example measures have been outlined to support the preparation of the action plan, providing a starting point for implementing an ambitious and effective climate action plan.³⁶

By April 2024, 866 tourism operators, including 71 from Finland, have signed the Glasgow Declaration.³⁷ Finland has the third highest number of signatories in the world after the United Kingdom and the United States. In Finland, the signatories include Visit Finland, the City of Helsinki, the City of Lappeenranta, Visit Tampere, goSaimaa and the companies Hotel Krepelin, Menevä Oy and Levi Ski Resort.³⁸

FINLAND'S CLIMATE ACTION PLAN (CAP)

Visit Finland committed to the Glasgow Declaration in 2022 and published its own Climate Action Plan (CAP) in November 2023. The plan has a total of 4 focus areas and 20 main objectives, divided into 163 actions. The first focus area is organisational capacity, which means that Visit Finland aims to be a pioneer and a trendsetter through its own example and in its own emission reductions. The second focus area is national guidance, which sets a framework for tourism climate action at the national level. International alignment means sharing lessons and insights and the harmonisation of EU and global standards and practices. Industrial support plays an important role in achieving the common goals: the STF programme provides support for climate work in the tourism sector through training and tools, for example.³⁹



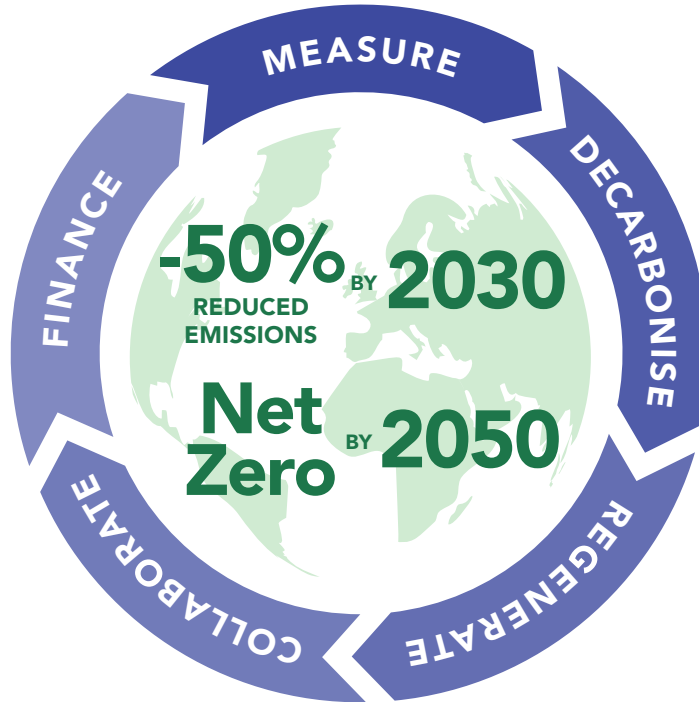
PHOTO: MARKUS SOMMERS












20 OBJECTIVES **163** ACTIONS

5 PATHWAYS **4** FOCUS AREAS

67 FINNISH SIGNATORIES 



EXAMPLES OF 20 OBJECTIVES:

-  Low carbon transport
-  Sustainable accommodation
-  Low carbon diets
-  Responsible events
-  Nature-based solutions
-  Regenerative approach
-  Domestic and interregional tourism
-  Climate change adaptation
-  Biodiversity protection

Climate Action Plan 2023

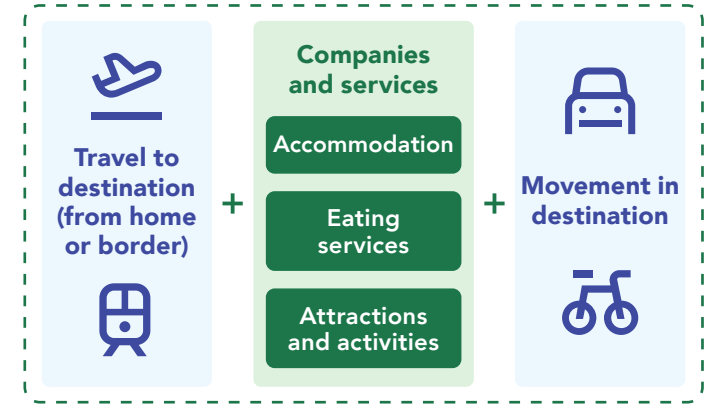
CARBON FOOTPRINT CALCULATION MODEL FOR DESTINATIONS

The emissions from tourism are monitored at three levels: the national level, the level of the destination, and the level of the tourism company. At the national level, the Border Survey is developing the monitoring of emissions from tourists' modes of transport. The STF programme has launched the Hiilikuri Tourism CO2 calculator for calculating the carbon footprint of companies. During 2023, the programme has been developing a carbon footprint calculation model for destinations, which complements the picture in terms of the entire travel chain and, in particular, the emissions from transport. The CO2 calculation model for destinations will be made available for pilot use as part of the STF programme during 2024. Carbon footprint calculation at the national level is at an early stage of development.

A lion's share of the carbon footprint of the tourism sector consists of emissions from travel from one place to another, which the model divides into three areas: travel to Finland, travel to or between destinations, and travel in the destination.

Tourist destinations are diverse. A destination may extend to several municipalities or regions, one municipality may have several destinations, and one company may be present in several destinations or in none at all. Therefore, it makes no sense to build a CO2 calculation model in which the combined emissions of all STF programme destinations should match the national calculation, for example, or in which the emissions of an individual company could only be taken into account in one destination. In general, each organisation should focus its climate work on issues it can influence. In the case of destinations, this mainly concerns transport – that is, from where tourists are attracted, what modes of transport are available for arrival in the destination, and the different modes of transport available in the destination for moving between activities, attractions, accommodations, and eating places. The analysis should encompass all modes of transport (not just those that produce emissions), so that

DEFINING A DESTINATION'S CARBON FOOTPRINT



the picture obtained of the tourist's experience would be as comprehensive as possible and the supply of emission-free modes of transport would remain suited to the evolving needs.

A lion's share of the carbon footprint of the tourism sector consists of emissions from travel from one place to another.

From sustainable to regenerative tourism

Alongside sustainable tourism, there is more and more talk about regenerative tourism. Regenerative tourism highlights a person's relationship with themselves, other people and the planet. It aims to provide tourists with unique experiences while further improving the condition of the destination from the perspective of both the environment and local community.⁴⁰ The definition often used is that regenerative tourism leaves the destination in a better shape than it was before the visit.⁴¹

However, regenerative tourism is much more than that. It is based on a holistic change of mindset, in which tourism is perceived as a living network that is connected to both the surrounding nature and local communities.⁴²

Regenerative tourism differs from sustainable tourism in many ways. Sustainable tourism aims to minimise the disadvantages of tourism while

creating economic wellbeing. In regenerative tourism, it is not sufficient to minimise the disadvantages: tourism must also give the destination something that will improve the wellbeing of both the destination and its residents. In regenerative tourism, the drivers of change are usually the hosts and local communities, in sustainable tourism the private sector and governments. The operating practices also differ, as regenerative tourism focuses on the development of destination-specific solution models, which involves all stakeholders and the expertise of different parties in a versatile manner, instead of universal solutions.⁴³

BACKGROUND OF REGENERATIVE TOURISM

Regenerative tourism is based on the concept of regenerative development, and it has been developed from the approaches to tourism developed by a team of researchers based in Chile,

the US and the UK since 2005. This collaboration was preceded by many stages from the beginning of tourism research in the 19th century to the development of new approaches from the 1970s onwards, when the field of study expanded to disciplines such as sociology and geography. The approaches of regenerative planning and agriculture were developed in parallel with the concepts of sustainable development and tourism from the 1970s onwards until 2004, all of which increased understanding of how tourism could be more sustainable.⁴⁴

In regenerative tourism, the drivers of change are usually the hosts and local communities.

The concept of regenerative tourism was first used in 2007 in a study on the architectural design of ecotourism destinations. Before the concept was established, the term conscious tourism was used alongside it. While the notion of regenerative tourism is quite recent, its roots lie deep in prehistory. The teams behind the current concept have been influenced by the worldviews, perspectives and cultures of several indigenous peoples, such as the Maori, Native Americans and Aboriginal Australians. The traditional ecological knowledge of indigenous peoples has been combined with Western science and practice, and together they form the basis of the ecological worldview of regenerative tourism.⁴⁵

While the notion of regenerative tourism is quite recent, its roots lie deep in prehistory.

The concept of regenerative tourism became more common in mainstream discussions on tourism in 2019 when Anna Pollock, a pioneer of regenerative tourism, brought it strongly to the agenda in events such as Travel to Tomorrow. The Covid-19 pandemic also further highlighted the vulnerability of the tourism sector and the need to rethink it. Towards the end of 2020, regenerative tourism gained even more prominence after the New York Times published an article on the subject.⁴⁶ Regeneration is also one of the five emission reduction pathways of the Glasgow Declaration.

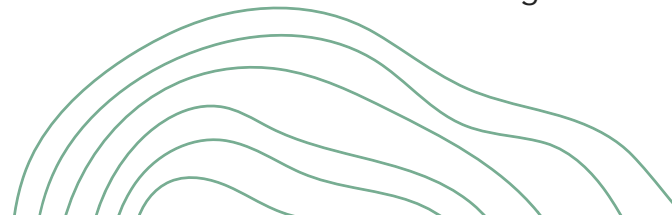
PRINCIPLES OF REGENERATIVE TOURISM

Regenerative tourism emphasises holistic system thinking, that is, the understanding that everything is connected and influences each other. For this reason, all parties from physical land to nature and living beings should be taken into account in all decision-making. People are seen as part of nature, in which everyone is equal. Therefore, people do not have the right to subjugate or exploit nature or the local community,

and it is not worthwhile either, because all life is interdependent.^{47,48}

Respecting the so-called “sense of place” is an important part of regenerative tourism. This means seeing the place with new eyes and paying attention to its special features, history and diversity, without forgetting the local residents and their character. Especially in cultural landscapes, there is often a very special connection between the locals and the destination.⁴⁹ In regenerative tourism, the special features of a destination are cherished and strengthened, not only maintained.

It is also necessary to review the indicators of success. The current paradigm aims for continuous growth, more visitors and more consumption, and this is not a sustainable model. New indicators have been developed in places such as Costa Rica, where success is measured not by the number of tourists, but by how many hummingbirds return to the area after the winter compared to the previous year.^{50,51} Genuinely regenerative tourism companies measure their



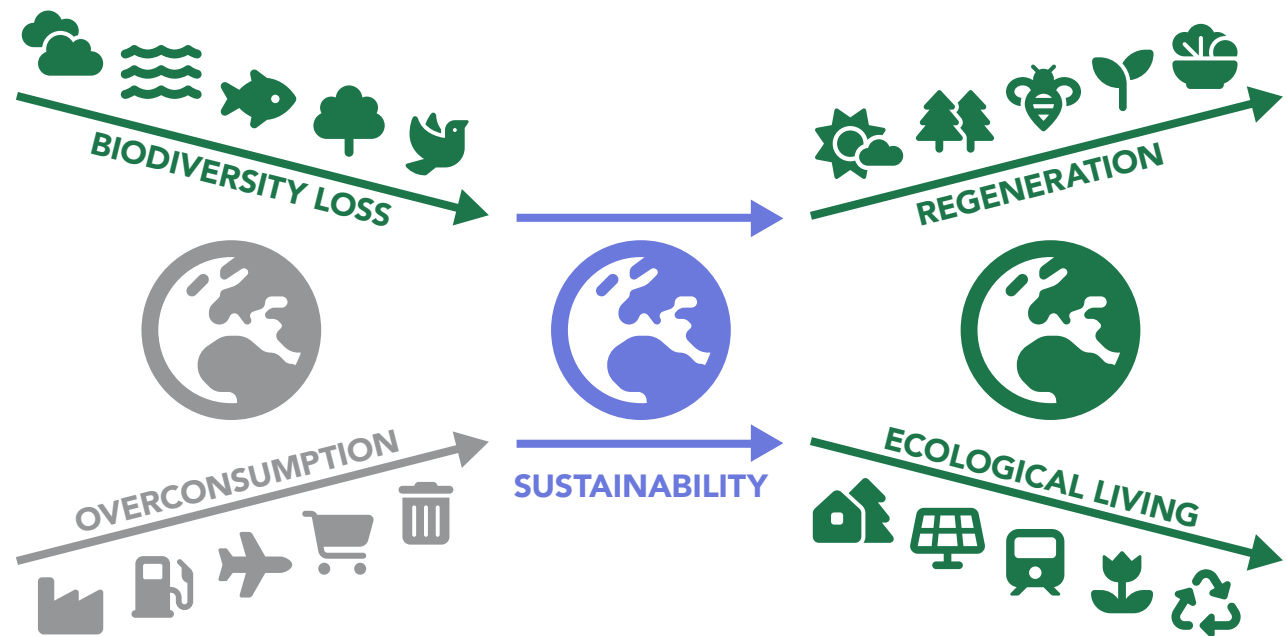
success through the economic, social and environmental benefits generated for all parties and also strive to extend the good they produce beyond their sphere of influence.⁵²

Regenerative tourism is not about reducing revenue, however. It is about improving productivity, destination management, and more creative understanding to unlock the potential of the destination. The model of regenerative tourism enables the management of natural resources, on which tourism depends, as well as improves understanding between the locals and tourists, which increases creativity, collaboration and flexibility. As a result, both the hosts and guests commit more to the destination.⁵³

In regenerative tourism, the special features of a destination are cherished and strengthened, not only maintained.

Therefore, regenerative tourism makes tourism a part of the surrounding ecosystem, and it is understood to be completely dependent on this ecosystem. Only when we have a holistic view of our impact on the ecosystem can we genuinely minimise the negative impacts and ultimately restore and improve the system. A restored and preserved ecosystem increases the resilience of tourism.

The tourism sector connects people and strives to increase their wellbeing and even their happiness. In keeping with the principles of regenerative tourism, the sector can become a force that revitalises communities, allowing all those involved, from business owners and employees to guests and locals, to participate in tourism and do well – not only in material and financial terms, but also mentally and physically.⁵⁴



REGENERATIVE TOURISM IN PRACTICE

The Regenerative Travel Alliance and Iniciativa Global de Turismo Regenerativo are platforms that have been established to support the adoption of practices in line with regenerative tourism, providing learning materials and other support.⁵⁵ Finnish operators in the sector are brought together by organisations such as Regenerative Tourism Initiative Finland led by Mood of Finland.⁵⁶ In addition, travel agencies focused on regenerative tourism have been founded to sell trips to destinations that take nature, locals or both into account in accordance with the principles of regenerative tourism.⁵⁷

An example of a foreign destination for regenerative tourism is the Tanzanian hotel Chole Mjini, which accommodates its guests in simple and ecological tree houses built in cooperation with the locals, the proceeds of which are partly directed to support the local community in efforts such as education.⁵⁸ In Finland, on the other hand, you can take a “nature management holiday” in Nuuksio in accordance with the concept piloted by Haltia Lake Lodge and Metsähal-

litus. In this concept, holidaymakers participate in regenerative tourism activities that vary by season. For example, they may control invasive species by weeding lupins or increase biodiversity by mowing meadows. Guides share historical stories about the region, the characteristics of nature in Nuuksio, and the importance of biodiversity.⁵⁹

One of the Finnish operators in the field is the Regenerative Tourism Initiative Finland led by Mood of Finland.

Canoeing trips in Lake Saimaa all year round and on nature’s terms

SAIMAA CANOEING

Saimaa Canoeing offers unforgettable canoeing trips in the stunning scenery of Lake Saimaa. Activities are available all year round and everything is always done on nature’s terms. The company restores old, empty cottages for reuse instead of taking over virgin land for construction purposes. The campsites are rented from local landowners, and hikers are instructed to leave as few traces as possible in nature.

In 2023, the company won the sustainability competition at the Matka Travel Fair. The jury called it “an excellent example of regenerative tourism, that is, how we can leave the environment in a better shape than it was before us with the help of existing infrastructure and communality”.

<https://www.saimaacanoeing.fi/en/home/>

OVERVIEW OF THE STF PROGRAMME IN 2023

Tourism sector in Finland in 2023

At the end of 2023, a total of 1,180 Finnish tourism companies⁶⁰ had joined the Sustainable Travel Finland programme managed by Visit Finland. The number of participants in the programme increased by 25% from the previous year.

Once a company has progressed through the entire STF programme development path, including obtaining a third-party sustainability certification, it can apply for the STF label. At the end of 2023, 387 companies had already received the STF label.⁶¹ The number of companies that received the STF label increased by as much as 77% during the year.

In addition to tourism companies, the STF programme offers a seven-step development path to destinations. The destinations must cooperate closely with the private sector, as destinations can only receive the STF label when

at least 51% of the tourism companies in the business network have received the STF label or when the destination has a GSTC accredited destination-level certificate and an action plan to help companies in the region on the STF path and, ultimately, receive the STF label. This far, 65 Finnish destinations have joined the programme.⁶² In 2023, three new destinations were granted the STF label, and altogether five destinations have now received the label.⁶³ The new STF destinations in 2023 were Puumala, Savonlinna and Tahko.

One of the goals of the STF programme has been to strengthen the sustainability measurement of the participants. Collecting data on the diverse impacts on local economy, community and environment helps to form an accurate picture of what is really happening in tourism.

The information supports decision-making and helps to define the boundaries of tourism as well as the scale and opportunities of the activity, as well as to read weak signals and react proactively.

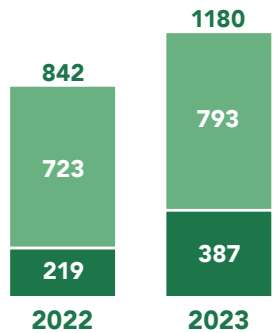
To draw this picture, it is important that companies and destinations participate in filling in the STF programme indicator forms. In October 2023, the STF programme introduced a new digital service, the STF Hub. The revised indicator monitoring form was only introduced in January 2024, so indicator data could not be collected from October to December 2023.

The number of companies that received the STF label increased by as much as 77% during the year.

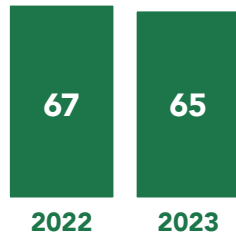
Filling in the indicator form is among the STF programme’s criteria, so it is required for the companies that have received the label. 322 companies, i.e. 83% of STF-labelled companies, filled in the indicator form.⁶⁴ Of the destinations, 19 or 29% submitted the data related to destinations.⁶⁵

In Visit Finland DataHub, the share of STF-labelled tourism products was 18%.⁶⁶ In 2023, destinations hosted 104 training events related to sustainable tourism.⁶⁷

STF-LABELLED COMPANIES AND PARTICIPATING COMPANIES 2022-23



DESTINATIONS PARTICIPATING IN THE STF PROGRAMME IN 2022-23



■ STF-LABELLED COMPANIES
 ■ OTHER PARTICIPATING COMPANIES
 ■ NUMBER OF DESTINATIONS



PHOTO: MIikka NIEMI

Economic value

The early 2020s have been economically difficult for the Finnish tourism sector. The Covid-19 pandemic, which started in spring 2020, severely prevented foreign tourists from travelling to Finland for several years. Domestic tourism increased, but this alone has not been enough to compensate for the lack of tourists arriving from abroad. The Russian war of aggression against Ukraine, which began in 2022, has affected tourists' sense of security in eastern Europe.

The war of aggression against Ukraine and the closure of the border between Russia and Finland has naturally affected tourism from Russia to Finland. Russia has typically been one of the top 3 countries of origin for Finnish tourism, but now the flow of tourists has ceased, which is especially visible in destinations in eastern Finland.

Despite many uncertainties, the Finnish tourism sector has recovered well: according to EU statistics, Finland's recovery rate is 95% compared to 2019, which is also the EU average.⁶⁸ Our neighbour Sweden has recovered up to 99%, Norway and Denmark to 100%, but Estonia's recovery rate is only 85%.⁶⁹

In Finland, 23 million overnight stays were made in accommodation establishments in 2023.⁷⁰ The number of overnight stays in accommodation establishments increased by 35% from 2022.

The accommodation capacity in Finland, i.e. bed-places, including rooms in accommodation establishments, cottages and other accommodation facilities and their bed-places, was 165,989 in 2022.⁷¹ The occupancy rate of these, i.e. percentage of the time the accommodation is occupied, was 35%.⁷²

The EU tourism statistics calculate Finland's accommodation capacity more extensively, including not only accommodation establishments but also camping sites and short-term rentals, and it has arrived at 256,880 bed-places. The occupancy rate for this was 38% in 2022.⁷³

Sweden's accommodation capacity is on the rise and already stands at 820,000. In 2022, Sweden's occupancy rate was 39%. Norway's accommodation capacity has remained at an average of 600,000 bed-places and the occupancy rate was only 35% in 2022. The number of bed-places in Denmark is also on the rise, with around 464,000 bed-places and an occupancy rate of 39% in 2022. In the light of EU statistics, Finland's occupancy rate is significantly lower compared to the neighbouring countries and it has not been on the rise like in Sweden and Denmark.⁷⁴

In 2023, 84% of the accommodation establishments⁷⁵ in the STF programme operated all year round, and the accommodation establishments were open for an average of 11.2 months.⁷⁶ The share of year-round tourism businesses increased by 17% from 2022.

The number of tourists arriving in accommodation establishments is on the rise after Covid-19. According to EU tourism statistics, 11.53 million tourists arrived in accommodation establishments in Finland in 2022.⁷⁷

According to Statistics Finland, the share of foreign tourists was 23% in 2023.⁷⁸ Nearly 4.3 million tourists arrived in Finland.⁷⁹ In 2023, 11% of the tourists arriving from abroad were day-trippers, which means that they returned to their country of origin on the same day.⁸⁰

The Finnish tourism sector's dependence on the three largest countries of origin was 8% in 2023. The largest countries of origin are 1. Germany, 2. the United Kingdom, 3. Sweden. The order has not changed from 2022 and 2023. Previous-

ly, Russia was one of Finland's top 3 countries of origin.⁸¹

The dependence of Finnish tourism on the three largest countries of origin has remained below the EU average (23% in 2022⁸²). High dependence on the three largest countries of origin is a bigger risk for the destination. The diversity of countries of origin ensures that even if tourism from a particular country of origin ceases, the influx of tourists remains reasonable. Finland's higher diversity of countries of origin has ensured that the tourism sector has not stalled despite the decline in Russian tourists. Regionally, the effects may show more in the east compared to rest of Finland.

It is also positive that the seasonality of the Finnish tourism sector is declining. The seasonality coefficient was 35% in 2022, which is about 5 percentage points less than in the previous year. The seasonality average for the EU as a whole fell from 57% to 45%.⁸³

Lower seasonality is good for the economic resilience of tourism, as it evens out tourism flows and makes them more manageable. At the same time, the positive effects for employment and revenue are distributed more evenly throughout the year. It is a good thing that tourists are also interested in off-peak times. This makes Finland and the entire EU tourism sector less dependent on certain seasons.

The tourism sector's direct share of employment was 5.1% in 2022.⁸⁴ In tourism, SMEs are a major source of employment, and up to 74% of jobs in the tourism sector are in SMEs⁸⁵. In 2023, 32% of the employees of STF companies worked on a seasonal basis.⁸⁶ The share was 12% lower than in the previous year, which means that companies in the STF programme are employing more and more year-round.

The recovery rate of Finnish tourism compared to 2019 is 95%.

According to Statistics Finland, an average tourist stayed two nights in one accommodation establishment in the entire tourism sector.⁸⁷ The average stay in accommodation establishments participating in the STF programme was slightly longer, 2.3 nights.⁸⁸

Tourism consumption amounted to EUR 14.81 billion in 2022.⁸⁹ According to the Border Survey, an average tourist consumed EUR 72 per day in 2023.⁹⁰ The average consumption of tourists has been on the rise, which is at least partly explained by the increase in inflation.

The resilience of tourism has been strengthened by lower seasonality and a lower dependence on the top 3 countries.

The share of e-commerce sales in Finland has grown significantly (58%) and even surpassed the EU average (38%). Only Sweden and Spain have higher e-commerce sales percentages than Finland.⁹¹

Finnish tourism companies are the most active social media users in the EU. In Finland, up to 65% of tourism companies use social media, compared to the EU average of 42%.⁹² The use of social media in marketing is important, especially for SMEs. On social media, companies can share genuine content about their operations and also direct it to specific target groups, such as adventure, extreme sports or nature tourists. Social media can also encourage tourists to make more sustainable choices by changing the norms and ideals of tourism.⁹³

Out of Finnish tourism companies, 23% offer training opportunities for employees to improve their digital skills⁹⁴. The majority of accommodation establishments, 76%, have a high-speed internet connection.⁹⁵

In 2022, the Finnish tourism accounted for 1.8% of the gross domestic product (GDP). It amounted to EUR 14.81 billion of total demand, which makes it a significant part of the Finnish economy. Statistics Finland's estimate for tourism demand in 2023 was EUR 15.3 billion. The tourism sector has recovered relatively well, although it has not yet reached the economic figures of 2019. At that time, tourism accounted for 2.7% of the GDP and total demand was EUR 16.3 billion. The resilience of tourism has been strengthened by a lower dependence on the top 3 countries of origin and a revival of demand in cities and northern destinations.^{96, 97, 98}

Social and cultural impact

Tourism is also about creating diverse connections between people and communities. The impact is two-way – while the trip leaves a mark on the travelling individual, the individual and the tourism sector as a whole have an impact on communities and culture. Tourism can generate significant social and cultural value for local communities, in addition to being a source of income and wellbeing. This value is made up of several factors, such as avoiding congestion, managing seasonality, careful planning, respecting capacity limits, and diversifying the special characteristics of the destination.⁹⁹

Measuring social and cultural impacts is often perceived as more challenging than assessing factors such as environmental or economic impacts. This is because these impacts are most often assessed indirectly, through the experiences of various user groups, making generalisations and comparisons less accurate. However,

the challenges with measurability do not mean that an action itself could not make an impact. According to self-assessments in the STF programme, companies report that they have taken more actions to promote socio-cultural sustainability in 2023 than to promote ecological sustainability. However, companies considered measures related to quality, safety and financial sustainability even more important.¹⁰⁰

In addition to providing a livelihood, tourism can bring significant social and cultural value to local communities.

SOCIO-CULTURAL RESPONSIBILITY

Taking the local community and visitors into account is part of sustainable tourism.¹⁰¹ Encounters that disturb the locals' everyday life or conflict with the values of the community can, if repeated, create tensions between tourists and residents. For example, a visitor may unwittingly wander into a private yard or, for the sake of fancy close-ups, invade the enclosure of domestic animals, disregarding signage and risks.¹⁰²

In addition to disruptive experiences, problems are caused by excessive tourism. A large number of tourists inevitably consumes the environment and puts a strain on nature. Matters that are small from the point of view of an individual tourist, such as deviating from the path in a nature reserve or hiding rubbish in nature, can cause significant harm when repeated hundreds and thousands of times. Tourists also put a

strain on the built environment and public services, such as waste management, recreation areas and environmental management. Many destinations have introduced a tourist tax to cover a part of the cost of shared services.

Seasonal fluctuations also bring their own challenges, as many investments have to be scaled in accordance with the needs of the high season. In the north, the summer milieu of a popular ski resort is characterised by huge, empty parking areas. In the south, marinas are filled to the brim during the holiday season, but for ten months of the year, the landscape is dominated by desolate beaches. It is possible to try to spread seasonal peaks to other seasons by organising weather-independent activities or by highlighting the characteristics of other seasons.¹⁰³ The seasonality of Finnish tourism is in decline and tourism flows are distributed more evenly throughout the year.¹⁰⁴

A responsible tourist respects local traditions, architecture, religions and practices. When meeting people from different cultural backgrounds, it is useful to be aware that their habits and needs may partly differ from your own and to take this into account.¹⁰⁵ In practice, this may mean following dress codes when visiting sacred sites, asking permission before taking photos, and respecting privacy. Sustainable tourism respects the socio-cultural authenticity of host communities and, at the same time, contributes to the longevity of the built and living cultural heritage.¹⁰⁶

A responsible tourist respects local traditions, architecture, religions and practices.

Cosy and sustainable temporary living

HIISI HOMES & HOTELS

Hiisi Homes & Hotels offers cosy and sustainable temporary homes while committing to systematic sustainability work together with key stakeholders. The company pays special attention to the wellbeing of its work community, because it believes that this is also reflected in the wellbeing of its customers. The working atmosphere at Hiisi is supportive and open, the office spaces are inspiring, and employees are offered regular recreation days and other common events. In addition, the personnel have a dedicated training programme called the Hiisi Academy.

Hiisi Homes & Hotels is based in Vihti and is actively involved in the protection of its home lake Hiidenvesi. In environmental matters, they resort to the Finnish certified environmental programme EcoCompass.

<https://www.hiisihomes.fi/en/>

INCLUSION

Inclusion means fair and non-discriminatory practices that do not exclude anyone. In inclusive tourism, all customers can access services and experience on an equal basis, regardless of age, gender, physical characteristics, socio-economic status, sexuality, or religion.¹⁰⁷ Inclusion is part of social responsibility, and it is included, among other things, in UNESCO's principles of sustainable development, as well as in Visit Finland's Sustainable Travel Finland programme.

According to the World Health Organization (WHO), about 15% of the world's population, such as senior tourists and people with reduced mobility, need accessible services. When we take into account also those who have a temporary need for accessible services, such as families with children or individuals recovering from an accident, this share even rises to 40%. In addition, tourists present a variety of different religions as well as gender and sexual minorities.¹⁰⁸ The share of companies providing services for persons with reduced mobility was 11% in 2023,

while it was 27% in 2022.¹⁰⁹ Unfortunately, equal access to services seems to have decreased.

People of different religions are a diverse group, as people of the same religion can practise their faith in different ways. Religions can be viewed similarly to different needs: for example, halal tourism has been developed to cater to the needs of the Muslim community. It is possible to develop services that are compatible with different religions by studying their principles and restrictions. Openness and curiosity are a good starting point for encounters and developing services.¹¹⁰

***In inclusive tourism,
all customers can access
services and experience
on an equal basis.***

Diverse intangible experiences for the community

THE KANGASALA ARTS CENTRE

The Kangasala Arts Centre offers local residents high-quality cultural experiences in their hometown. The centre emphasises equality and accessibility. It is easily accessible from the city centre on foot, by bicycle or by bus, and customers are encouraged to use public transport.

The Kangasala Arts Centre is an active cultural educator, offering musicals in the main auditorium by pupils studying at the local music-oriented upper secondary school, concerts by pupils studying at the local music institute, and free art museum visits for schoolchildren. Procurements are made from local service providers and from companies that can also showcase their operations at the annual Culture and Wellbeing Market.

<https://kangasala-talo.fi/en/>

It is important that equality is also realised among the personnel. According to the Non-discrimination Act that entered into force in 2017, every company with at least 30 employees must draw up an equality plan that promotes equal opportunities at work, prevents discrimination and supports the formation of a healthy working environment. In addition to its multiple benefits, inclusion is also a strong message about the company's values: are we developing services for everyone or have we excluded some groups? When destinations and tourism companies increase inclusion, society becomes more

accessible for everyone, which reduces inequality at the level of the individual.

Poor consideration of diversity, equality and inclusion was already discussed in last year's State of Sustainable Tourism report. Since then, DEI (Diversity, Equity, Inclusion) has gained a foothold in the development discussions of the tourism sector. Visit Finland's annual seminar on Sustainable Tourism in Savonlinna in November 2023 selected equality as the development theme for 2024.

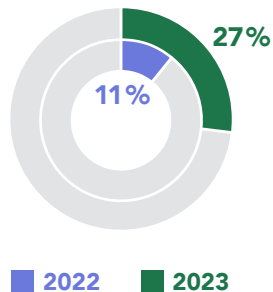
A company that embraces the DEI principles strives to ensure that everyone, including tourists and employees, has the opportunity to participate equally. In this way, DEI can be a significant competitive advantage for companies, as it can attract both customers and employees more extensively.

IMPACT OF CLIMATE CHANGE ON CULTURE

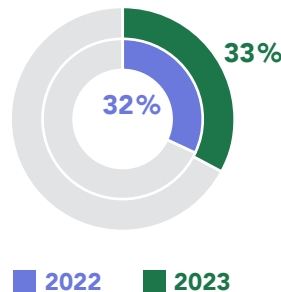
Climate change is humanity's greatest threat, and its physical effects, such as increased extreme weather conditions, loss of biodiversity and rising sea levels, also put cultural heritage at risk.¹¹¹ In addition to ancient monuments and building heritage, cultural heritage includes literary archives and minority cultures.¹¹² Up to a third of World Heritage Cities are located in coastal regions and they are in direct danger of being submerged by rising sea levels.¹¹³ Therefore, we can add a cultural dimension to the challenges of climate change: the preservation of cultural heritage and the intangible capital of humanity.

Besides climate change, there are other risks, loss of biodiversity being the most serious one. Since the crisis is systemic, its effects will only become apparent in the long term, as the damages accumulate and we finally cross a certain – planetary – boundary.

STF COMPANIES PROVIDING SERVICES FOR PERSONS WITH REDUCED MOBILITY 2022-23



STF COMPANIES PROVIDING SERVICES TO AN LGBTQ+ AUDIENCE 2022-23



Loss of biodiversity also has a direct impact on global food security. As species diversity decreases, the availability of many raw materials decreases when species no longer adapt to the changing environment. Climate change can cause unpredictable weather patterns, making it difficult to grow crops and making yields uncertain. Food culture is a strong part of cultural heritage. If familiar ingredients become unavailable in the future, traditional dishes may face changes.

FINLAND'S LASTING CULTURAL HERITAGE

Finland has a total of seven UNESCO World Heritage Sites, as well as several culturally significant sites and geoparks. In addition, the country has 147 nationally significant built cultural environments.

*Climate change
also threatens
cultural heritage.*

The UNESCO World Heritage Sites in Finland are:

- Fortress of Suomenlinna (added to the World Heritage List in 1991)
- Old Rauma (1991)
- Petäjävesi Old Church (1994)
- Verla Groundwood and Board Mill (1996)
- Bronze Age Burial Site of Sammallahti (1999)
- Struve Geodetic Arc (2005)
- Kvarken Archipelago (2006)

Finnish intangible cultural heritage includes the sauna tradition (2020), the Kaustinen folk fiddle playing (2021) and the multinational Nordic liner boat tradition (2021).¹¹⁴

Sauna bathing is an important part of Finland's cultural heritage and a pleasant experience for tourists. Heating the sauna takes a lot of energy, which has been a problem especially with increasing energy prices. The environmental impact of sauna bathing depends significantly on the energy source. If you heat an electric sauna with certified environmental electricity, you can

A home of culture for lovers of nature, open to the public

VILLA SKEPPET

Villa Skeppet is a unique author's home in Ekenäs, which opened its doors to the public in December 2020. The building was designed by architect Alvar Aalto for his good friend, author, humanist and environmentalist Göran Schildt. The activities of Villa Skeppet are managed by a foundation upholding Schildt's values.

Through its activities, Villa Skeppet aims to respect nature and provide its visitors with a sustainable cultural experience. For example, it has purchased an adjacent forest area to preserve biodiversity around the building. The house makes its purchases from local operators and also directs its guests to use local services. The house hosts two free open days a year.

<https://villaskeppet.fi/en/>

reduce the emissions to zero, but the emissions from heating the sauna with electricity produced with fossil fuels easily exceed 5 kg CO₂e, which is equivalent to driving 35 kilometres in an average passenger car.¹¹⁵

Regardless of the energy source used to heat the sauna, the number one rule in an environmentally friendly sauna tradition is to avoid unnecessary heating and overheating.¹¹⁶ On average, a wood-heated sauna is better for the climate than an electric sauna, but on the other hand, the small combustion of wood is the largest source of fine particles and black carbon in Finland.¹¹⁷ Regular maintenance of the stove facilitates clean and efficient heating while also maintaining a good air quality in the sauna.

Northern Finland has a lot of winter-related cultural heritage. Winter sports are internationally known, but their importance is even greater as a popular hobby and an everyday source of

wellbeing. Winter culture is also associated with a snow play tradition with its snow castles, snow men and snow lanterns.¹¹⁸ While the shortening of winters does not yet threaten these throughout the country, the shrinking snow season might in places mean an end to the snow play tradition. Children growing up in the snowless southern parts of the country no longer have an equal opportunity to play in the snow, which means that knowledge of snow traditions will no longer be passed down from generation to generation.

Winter conditions are also important for many sources of livelihood, such as reindeer herding. Warming winters affect the amount of snow, and changes in the structure of snow can make it difficult for reindeer to find food.

The Sámi are the only indigenous people in the EU, and Finland is home to around 10,000 Sámi people. As an indigenous people, the Sámi have the right to cherish and strengthen their language and culture, as well as to pursue their traditional livelihoods. In 2018, the Sámi Parliament adopted responsible and ethically sustainable principles for Sámi tourism. The purpose of these guidelines is to eradicate tourism that makes improper use of the Sámi and prevent the spreading of false information about the Sámi identity. At the same time, the aim is to protect the way of life and traditions of populations outside tourism and to promote intercultural understanding and respect.¹¹⁹

The Sámi are the only indigenous people in the EU.

IMPACT OF THE PANDEMIC

Due to the Covid-19 pandemic and the resulting travel restrictions, the number of trips abroad decreased significantly in 2020 and 2021.¹²⁰ Consequently, the importance of domestic tourism was emphasised during this period. In 2022, some of the international tourists returned, and in 2023, the figures first started to resemble those before the pandemic.

The travel restrictions imposed because of the pandemic hit accommodation services particularly hard. The hotel occupancy rate in Helsinki was only 10–15% during the pandemic.¹²¹ Exceptional circumstances in the future create uncertainty for tourism companies, and this may, in turn, have a significant impact on the survival of travel destinations:

It is also possible to learn something from the new forms of tourism that emerged during the pandemic. Due to the restrictions, many people travelled more domestically. Domestic tourism can reduce the carbon footprint of tourism, as distances become shorter and the need to travel by air is reduced.

The pandemic changed workplaces in one way that seems to be here to stay: remote work became commonplace. By combining remote work and tourism, it is possible to travel less frequently and slower. You can handle a working day on the train on the way to your destination, compared to urgent flights after the end of the working day. Indeed, for the sake of the sustainability of tourism, it is hoped that tourists would stay in their destinations longer. A short stay in the destination means a higher carbon footprint per travel day, as the emissions from transport are spread over a shorter period of time. Extending one's stay increases income from tourism in the destination, without any increase in emissions from transport. Combining remote work and leisure tourism can thus also contribute to the sustainability of tourism.

Global warming, environmental changes and large-scale industrial meat production will further increase the risk of pandemic diseases, which means that the tourism sector should prepare for exceptional circumstances due to pandemic diseases in the future, too.



PHOTO: HARRI TARVAINEN

WELLBEING AT WORK IN THE TOURISM SECTOR

Working conditions in the tourism sector and the treatment of employees have recently become a topic of discussion within the industry and in the media. These are being monitored with STF indicators but also by means of research. In late 2023, tourism sector employees' experiences of wellbeing at work were investigated in cooperation with the Service Union United PAM as part of PAM's membership survey. It was a pilot project, on the basis of which the final indicators measuring wellbeing at work will be included in the national indicator system of sustainable tourism. Although the response rate was still moderately low (N = about 1,600 respondents), the data nevertheless provides an indicative picture of wellbeing at work in the industry.

Of the respondents, 61% perceive their overall job satisfaction as good and 74% perceive their own skills and training opportunities as good. The appreciation of personnel diversity is also at a good level: according to the survey, 73%

fully or somewhat agree. While the appreciation of diversity is important in all sectors, it is especially important in the tourism sector because the work is typically seasonal and multicultural: seasonal workers are needed from different countries and cultures.

Satisfaction with the work community is also high with 86% of respondents being fully or somewhat satisfied. The indicator includes fair treatment, support at work and experience of inclusion in the work community.

Around one third of respondents are fully or somewhat satisfied with the opportunities for advancement at work. Employee satisfaction has a direct impact on the quality of customer service, while employee turnover has a direct impact on the profitability of business. In part, employers would be able to address this challenge by developing their responsibility competence and providing employees with advancement opportunities in the tourism sector. Indeed, over half (54%) of respondents are interested in changing careers.

Approximately 30% of tourism companies do not have a personal development plan for their employees, which means that the employer has not taken their employees' competence and desire for development into account. Indeed, low satisfaction with advancement opportunities and a high interest in changing careers pose a considerable risk to a sector with a shortage of workers and a high number of seasonal workers. Engaging skilled personnel would be important to avoid financial impacts and skill shortages in the future. Companies should invest in the attractiveness of the industry to ensure adequate labour supply in the longer term.^{122,123}

The appreciation of diversity is especially important in the tourism sector because the work is typically seasonal and multicultural.

Environmental impacts

The humankind is completely dependent on nature: it provides us with all our energy, food and raw materials. Compared to the Earth's ecological carrying capacity, we over-exploit natural resources globally: 1.7 Earth's renewable natural resources every year. Finland also consumes huge amounts of natural resources, up to four times more than would be sustainable. Excessive consumption of natural resources also weakens biodiversity, which is reflected in phenomena such as the collapse of fish stocks. However, everyday choices can make a difference, and repair, modification and maintenance of goods curb overconsumption. Changes in legislation can also encourage households and businesses to act sustainably.^{124,125}

Similarly to cultural environments, natural environments are crucial resources for tourism. Therefore, their maintenance and protection is vital for the sector. Furthermore, tourists are

increasingly aware of the impact of tourism on the environment, which means that responsible companies and destinations are seen in a positive light by customers.¹²⁶

Many of the negative environmental impacts of tourism have already been highlighted in earlier chapters of this report in relation to planetary boundaries, for example. On the other hand, the report has also mentioned regenerative tourism solutions, the idea being that tourism would help destinations to develop instead of being a burden to them. Often even small, concrete actions save natural resources and reduce emissions. Next, we will look at the situation regarding various aspects of environmental impacts in STF companies in 2023 compared to 2022. Some indicators that describe the situation in Finland compared to the EU average will also be presented.

ENERGY AND WATER CONSUMPTION

In the hospitality industry, energy consumption focuses on the electricity, heat and water consumption of buildings, as well as the use of machinery and equipment.¹²⁷ In Finland, the energy consumption of buildings plays a greater role than in countries with milder climates. Due to our northern location, buildings must be heated for the majority of the year. However, many companies in the tourism sector also need cooling, as it can get hot in the summer. Despite this, Finland remains below the EU average with regard to the energy intensity of the tourism sector, which was 2 GJ per million euros spent on tourism in Finland in 2020. In the same year, this indicator averaged 2.5 GJ per million euros spent on tourism in the EU.¹²⁸

Finland consumes four times more natural resources than would be sustainable.

Tourism companies are working hard to reduce energy consumption. Up to 96% of the companies participating in the STF programme use at least 30% of the measures listed in the programme to reduce energy consumption.¹²⁹ The number of these companies has increased again compared to 2022, when 89% of the companies in the STF programme reported similar activities. The average number of the means used has also increased over the same period from six to seven.¹³⁰ In STF companies, typical measures to reduce energy consumption are consumption monitoring, temperature control and switching to LED lighting.

In 2023, an average of 69% of the annual energy consumed by companies in the STF programme was produced from renewable energy sources. Even if companies had only reported the amount of purchased electricity and the share of renewable energy, the figure is still encouragingly high. Compared to 2022 (68%), the share of renewables had increased slightly.¹³¹

Energy consumption measures, including the increase of energy efficiency and the choice of energy sources, have a significant impact on emissions from the tourism sector: In *the low-carbon roadmap for the hospitality sector* by MaRa (2020), electricity and district heating accounted for up to 93% of the emissions included in the industry survey in 2018. The significance of electricity and heating with regard to emissions will not diminish much in the next few years, since in the same survey they are predicted to correspond to 83% of total emissions in 2035.¹³²

Water consumption forms a remarkable part of energy consumption for many companies in the tourism industry, such as companies offering spa or accommodation services. Up to 90% of the companies in the STF programme use at least 30% of the measures listed in the programme to reduce water consumption.¹³³ The number of these companies has increased from last year, when 83% of the companies reported similar activities. On average, companies have three water-saving measures in place, such as installing spray nozzles and taps that reduce water consumption.¹³⁴

A holiday in Lapland on a reindeer farm, respecting the cultural heritage

ARCTIC LAND ADVENTURE

Arctic Land Adventure offers holidays in Lapland on a reindeer farm, respecting the cultural heritage. At the core of the activities is the Sámi way of life and harmony with nature. All buildings are made of wood and they have been positioned in the landscape with respect for nature. Instead of snowmobile safaris, customers get acquainted with reindeer herding in a sled towed behind a snowmobile, which reduces the carbon footprint per customer.

Ingredients for the dishes are collected or caught by the hosts themselves or purchased from small domestic producers located as close as possible. Food waste is minimal, as dinner is served to the table and not as a buffet. All parts of the reindeer are used: meat for dinner, skins on safaris, antlers in lamps and bones as material for artisans.

<https://arcticlandadventure.com/en/sustainability/>

TRANSPORT

Up to half of tourism-related emissions are caused by transport, especially air travel. In 2016, emissions from tourism-related travel accounted for 5% of all emissions caused by human activity. These emissions are still on the rise, with emissions from tourism-related travel expected to increase to 5.3% by 2030.¹³⁵

Scandinavians travel the most in the world per capita, and Finns rank high in this group. In Finland and other rich countries, emissions from tourism-related travel are several times higher than global emissions from tourism-related travel, i.e. around 10–20%. Most of these are caused by air travel, and the emissions from a single long flight can exceed those of driving a passenger car for a year.¹³⁶

The emission intensity of air travel, i.e. the carbon footprint per trip, was 124.44 kg CO₂e in Finland in 2022. The figure decreased by almost 36% compared to the corresponding indicator for 2021 (193.55 kg CO₂e/passenger). In Finland, however, the emission intensity of air travel

is still higher than the EU average (103.16 kg CO₂e/passenger)¹³⁷. Our dependence on long-haul markets declined from 12% to 8.1% between 2021 and 2022. This is slightly below the EU average (10.21%).¹³⁸ Long-haul markets mean markets more than 2,000 kilometres away from Finland.

For many tourists, Finland is easiest to reach by air, and in 2023, 62% of tourists arrived by air. According to the Border Survey, which takes into account those arriving through ports and airports, 38% of tourists arrived by sea.¹³⁹ Train travel accounted for 15% of domestic tourism in Finland in 2022, slightly above the EU average (13%).¹⁴⁰ The average climate impact of a trip per day was 41 kg CO₂e in 2023.¹⁴¹

When looking at the emissions from different modes of transport per person, i.e. per passenger-kilometre, the train and the bus produce the least emissions.¹⁴² Travel by land is a responsible way to experience and see the world, and various websites and communities have been established around the topic on online

platforms such as Facebook. People use these platforms to share tips on purchasing tickets and finding routes, among other things. It is not that easy to travel between Finland and other parts of Europe without flying, but it is possible to travel through Stockholm by taking a ferry from Finland, for example. Stockholm has train connections to cities such as Hamburg, which in turn has good connections to several European destinations.¹⁴³ However, according to a survey commissioned by Visit Finland, travel by land and by sea from the European target markets to Finland takes seven times longer than flying. The lowest-carbon way to arrive in Finland is by train through Haparanda, Sweden, but there are currently no further connections from Haparanda to Finland. In addition, all train routes are completely dependent on connections to Hamburg, which are already packed. It remains to be seen whether more and more tourists will switch to travel by land as climate change progresses.

RESPONSIBLE SOURCING

Procurement is an important part of corporate environmental responsibility, as it enables companies to significantly influence their environmental and climate impacts. Responsible sourcing requires planning and commitment, and it is often one of the most challenging areas to manage in corporate responsibility. The simplest solution is to manage it with contract partners, making it easier to trace raw materials, for example. The longer the supply chain, the more difficult it is to supervise it and obtain information about it.¹⁴⁴

Taking environmental issues into account in procurement is easier by favouring eco-labelled services and products, since obtaining the labels requires compliance with certain criteria. It is possible to adopt low emissions and recyclability as procurement criteria. One sustainable decision is to invest in long-lasting and high-quality products and to replace disposable products with durable ones. When purchasing equipment and properties, energy efficiency should be among the criteria. All purchases should also be

considered from the point of view of necessity: is the purchase really necessary or could the old product be refurbished or repaired? Products do not always have to be new either. Instead, you can first check whether there is a suitable used product available.^{145,146}

The production of food, especially meat, has a significant impact on climate change and biodiversity loss. Adding plant-based food to the menu and reducing meat is a simple and effective way to reduce environmental impacts and improve the healthiness of food.

Food is perceived as an increasingly interesting aspect in tourism, and responsibly sourced food has become a distinct criterion for tourists. Food is also a significant part of the procurement and business of many operators in the tourism sector. As a country, Finland has many strengths that support the efforts of food tourism companies towards sustainable development: these include the Finnish nature relationship, cleanliness, local specialities and traditions related to nature.¹⁴⁷

The weavers of good life and certified natural materials

LAPUAN KANKURIT

Lapuan Kankurit is one of the few weavers still operating in Finland. It has been in operation since 1917. The family business invests in sustainable and high-quality natural materials, such as certified linen and wool. In addition, the company has designed the processes in its weaving mill so that their ecological footprint is as small as possible. The company also has its own spinning mill and finishing plant for the use of Finnsheep wool.

The company's operations are highly transparent and it offers factory tours, for example. In its responsibility manifesto, the company is committed to distinct and concrete actions to help their long-lasting products address the real challenges of the overconsumption of natural resources.

<https://www.lapuankankurit.fi/en>

Responsible food procurement can be carried out by purchasing local food, in which case the environmental, economic and social responsibility remains in Finland instead of being outsourced outside the country's borders. For example, around half of Finland's water footprint is generated abroad because we use plenty of food products produced abroad that consume a lot of water, such as rice. Favouring Finnish food is also worthwhile from the point of view of international customers who value local food. Other means of responsible food procurement include favouring certified products, which guarantees that responsibility issues have been taken into account in their production.¹⁴⁸

Favouring Finnish food is also worthwhile from the point of view of international customers who value local food.

Companies in the STF programme carry out many food-related measures, as 62% of them use sustainably produced food products and organic products as part of their food services.¹⁴⁹ The change from the previous year is 2 percentage points compared to the previous year's figure of 60%. On average, companies implemented three measures to promote sustainable food choices, and the number of these has also increased by one measure compared to the previous year's two measures.¹⁵⁰ The most popular measures taken by STF companies last year were to minimise waste, utilise waste and encourage customers to choose climate-friendly food.

In Finland, the amount of food waste is up to 400 million kg per year, of which about a fifth is generated in restaurants and institutional catering.

WASTE AND SORTING

In 2023, companies in the STF programme collected an average of four waste types at customer premises and six waste types at the company's own premises.¹⁵¹ The figures for these indicators have not changed since the previous year. Waste legislation obliges companies to separately collect mixed waste, bio-waste as well as glass, metal, cardboard and plastic packaging waste, if a certain average number of kilograms per waste type is produced per week.¹⁵² These amounts are easily met by food service companies in particular, and indicators related to waste types show that many companies sort several waste types. Although many tourism companies operate outside local detailed plans and master plan areas, companies in the STF programme apply for a certificate as part of the programme and its criteria often include requirements related to waste management. Comprehensive sorting options are also often among the most visible environmental responsibility aspects from the perspective of the customer.

In the tourism sector, the largest waste type by weight is often bio-waste, at least in companies with an emphasis on food services in their operations. Globally, food waste – originally edible food that ends up in the bin – is estimated at about 31% of total food production. In Finland, food waste amounts to 300–400 million kg per year, of which about 20% is generated in restaurants and institutional catering.¹⁵³ According to a study by the University of Eastern Finland and its American research partners, however, it is not enough that only traditional companies providing hospitality services participate in the promotion of sustainable development and reducing food waste. It is necessary to involve the entire range of service providers reflecting the current reality of the tourism sector as a whole. According to researchers, it is also necessary to investigate the causes of waste and the possible bottlenecks in combating it. In addition, it is necessary to identify connections and situations in which it is possible to influence the generation of food waste through social media, for example.¹⁵⁴

There are several ways to reduce food waste. For example, it is a good idea to start measuring waste and consumption and learn to use this information to anticipate and optimise required food volumes. It is also good to check whether there are any older products left before placing new food orders. In addition, it is recommended to identify dishes that are difficult in terms of waste management and to examine the possibility of harmonising the ingredients of the dishes on the menu.¹⁵⁵ Waste can also be reduced by using leftovers as ingredients in new dishes, such as soups and sauces, or by selling customers clearly labelled, cheaper waste food meals.¹⁵⁶

Waste can be reduced by using leftovers as ingredients in new dishes or by selling customers clearly labelled waste food meals.



PHOTO: TIMO SEPPÄLÄINEN

CARBON-NEUTRAL TOURISM 2035

The tourism sector is responsible for up to 8% of global CO₂ emissions. Interest in tourism keeps growing, and as people's income increases, more and more people want to increase their spending on tourism rather than on other products and services. As a result, the tourism sector is expected to become one of the largest greenhouse gas emitting sectors, with both international and domestic tourism projected to grow by around 50%. In popular tourist countries, such as Spain, the tourism sector already accounts for up to 11% of national emissions.¹⁵⁷

The tourism sector is aware of its emission intensity, and it is taking action, as the Glasgow Declaration testifies. As many as 49% of companies in the STF programme measured their carbon footprint in 2023, and the figure increased significantly compared to 27% the year before¹⁵⁸. The STF programme has recommended undertaking carbon footprint calculations for some time now, and they were included in the STF path when the Hiilikuri Tourism CO₂ calculator was included in the STF Hub in spring 2024.

Although calculating the carbon footprint is not a mandatory part of the STF programme for the time being, this development is likely to increase the number of carbon footprint calculations carried out by the participating companies.

As tourism companies calculate their carbon footprint more often, the availability of emissions data concerning the sector will also improve. However, it is difficult to compare the carbon footprints of different companies directly, as companies' practices, lines of business and scale of operations vary significantly. Measures have been taken to improve the prerequisites for comparison by developing CO₂ indicators, for example. The analysis of the results has also been piloted during 2023 when compiling the STF statistics.

In Finland, the greenhouse gas intensity of tourism, i.e. emissions in relation to economic value, was 59 tonnes CO₂e per million euros in 2021, which was slightly lower than the EU average (64 t CO₂e/million euros).¹⁵⁹ Tourism companies do their part to reduce emissions.

Sustainable nature tourism next to a national park

HALTIA LAKE LODGE

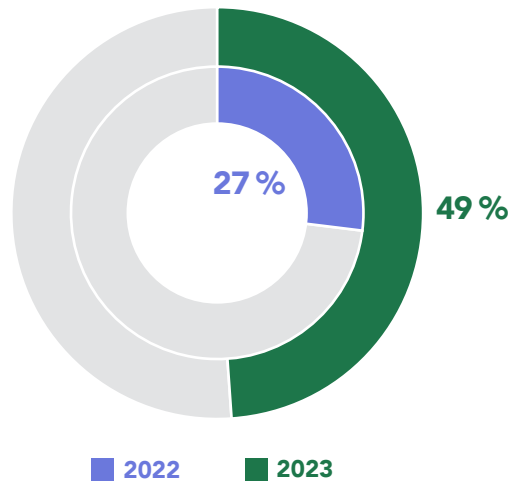
Haltia Lake Lodge offers sustainable nature tourism right next to Nuuksio National Park. The company uses 100% wind power, works closely with small local businesses in Nuuksio and builds according to the principles of the circular economy. The company's goal is to achieve carbon neutrality by 2025. Haltia Lake Lodge was named as Best Sustainable Hotel at the World Boutique Hotel Awards in 2022.

The regenerative joint holiday concept of Haltia Lake Lodge and Metsähallitus aims to combat biodiversity loss. Haltia Lake Lodge is responsible for the accommodation, food and transportation, while Metsähallitus provides training for travel guides, among other things.

<https://haltialakelodge.com/en-US>

As many as 99% of STF companies say they are actively involved in climate change mitigation efforts, and this number has not changed from 2022.¹⁶⁰ However, companies took an average of 15 actions that mitigate climate change in 2023, increasing this figure by 2 from 13 in the previous year.¹⁶¹ The most popular measures among the STF programme companies were related to waste prevention, employee orientation and sustainable procurement. In other words, com-

STF COMPANIES THAT MEASURE THEIR CARBON FOOTPRINT 2022-23



panies are investing more and more in climate change mitigation.

Visit Finland's Climate Action Plan aims at measures that support Finland's goals of being a holistically sustainable and carbon-neutral country by 2035. The target is in line with the targets laid down in the Climate Act to reduce Finland's emissions by 60% by 2030 and to reach carbon neutrality by 2035. The annually updated Climate Action Plan helps tourism companies, destinations and Visit Finland to systematically reduce their emissions.¹⁶² In addition, many companies in the tourism sector have their own climate action plans.

The goal of the Climate Action Plan is that Finland will be a holistically sustainable and carbon-neutral travel destination by 2035.

NATURE CONSERVATION

Clean and stunning nature is one of the most important attraction factors of Finland. According to research, spending time in nature has numerous positive effects on mental and physical health and wellbeing. It has been shown to relieve stress, reduce allergies and revive the mind, among other things. It is no wonder then that appreciation for nature, silence and wellbeing is steadily growing.¹⁶³

Finland is an ideal country for nature tourism, as internationally rare "everyman's rights" allow anyone to enjoy nature in Finland. We also have plenty of opportunities to get around in nature, with a staggering 9.2% of our land area being national parks.¹⁶⁴ This opportunity is in wide use, and in 2023, up to 8.7 million people visited national parks, as well as state hiking areas and customer service points.¹⁶⁵ The figure increased by 200,000 people compared to 2022. Nature connectedness is also reflected in Finland's nature-based tourism potential, which is 19%, leaving behind Sweden (15%) and Norway (9%).¹⁶⁶ The value reflects the percentage of total accommodation capacity in areas with good nature-based recreational opportunities.

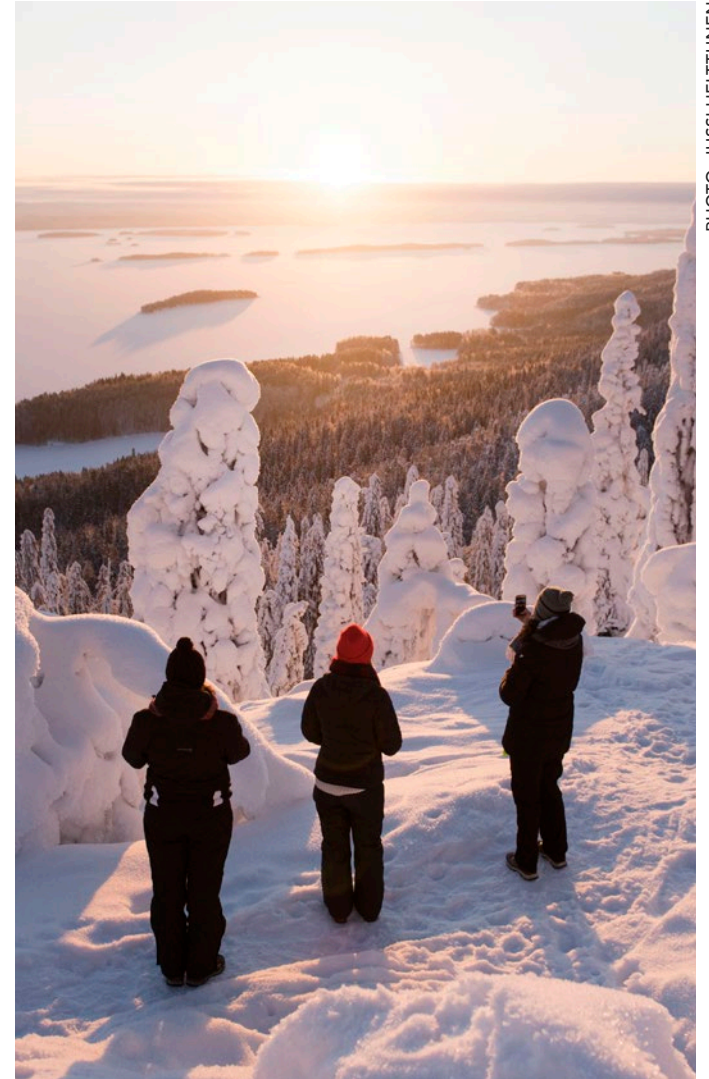
Finland is also known as the country of thousands of lakes. Our clean waters invite you to go boating and swimming. The share of excellent bathing waters in Finland has increased to 90.64% in 2022 from 89.56% in the previous year.¹⁶⁷ This is more than 5 percentage points higher than the EU average (85.09%).

Pioneering companies in the tourism sector are aware of the importance of nature for their business, and companies in the STF programme take an average of five actions to promote biodiversity.¹⁶⁸ The most popular measures include collecting litter from nature and combating invasive alien species on one's own land. Up to 92% of companies in the STF programme operating in national parks and other nature conservation areas managed by Metsähallitus have a sustainable tourism agreement with Metsähallitus.¹⁶⁹ This agreement is required when the tourism business takes place in areas with campfire sites, routes or other hiking infrastructure and when the company's operations rely on this infrastructure. There are two types of collaboration agreements: the first type is concluded when

the entrepreneur does not use the hiking infrastructure maintained by Metsähallitus in their operations but shares information about the destinations of Metsähallitus with their customers, for example, and the second agreement type is for companies that make use of camping infrastructure.¹⁷⁰

The share of tourism companies in the STF programme that actively support the protection, conservation and management of local biodiversity fell to 41% in 2023, compared to 46% in the previous year.¹⁷¹ In the future, taking biodiversity into account will be more closely integrated into the STF programme and new tools for this will be provided. The corresponding indicator presented in the State of Sustainable Tourism 2022 report was 67%, but the method of calculation has since changed and the figure has been corrected retroactively.

Clean nature is one of the most important attraction factors of Finland.



Closing remarks

The Finnish tourism sector has recovered well, but it has not yet reached the record levels preceding the Covid-19 pandemic. The tourism sector is an important part of the Finnish economy, creating jobs especially through SMEs and supporting regional development across the country. The economic trend is positive, and by investing in sustainability, we can truly be the most sustainable travel destination in the Nordic countries.

The Covid-19 pandemic also created tourism opportunities related to domestic tourism and the increase in remote work. Europeans are interested in Finland as a travel destination. In 2023, the largest countries of origin were Germany, the United Kingdom and Sweden, as in the previous year.

The environmental impact of the tourism sector remains significant, especially in terms of ener-

gy consumption and transport emissions. Slow tourism and travel by land are on the rise, as is combining business and leisure travel. Both trends are desirable in terms of transport emissions from tourism, as most of the environmental impacts of tourism are caused by travel to and from the destination and it is more sustainable to stay in the destination for longer periods of time.

The tourism sector has global climate goals, and Finland has a national Climate Action Plan (CAP). The Finnish tourism sector has shown itself to be active in combating climate change, and many Finnish tourism organisations are committed to the Glasgow Declaration. In addition to climate goals, the impacts on biodiversity require even more attention and a dedicated biodiversity programme for the industry.

More needs to be done to make inclusive tourism a reality and to ensure that tourism truly belongs to everyone. The development of inclusion benefits all parties: the customers, locals and tourism companies.

In 2023, security has also become a key factor in the tourism sector. The sense of security influences the overall satisfaction of tourists and the choice of destination. This is a cross-cutting theme related to economic, social and ecological impacts. Therefore, security aspects are also essential when developing travel destinations. Finland is perceived as an organised and a safe travel destination. By promoting safety proactively, it is possible to ensure Finland's reputation and attractiveness also in the future. Visit Finland is gradually making safety an integral part of the STF programme during 2024.

In 2023, the Sustainable Travel Finland programme gained significant support among Finnish tourism operators, which is reflected in the growth of the number of participants and STF-labelled companies. For STF destinations, collaboration with the private sector is essential with regard to achieving the STF label. There is still room for improvement in filling in the indicator forms, although a large number of the labelled companies have met this obligation. New digital services such as the STF Hub make it easier to collect data and publish results.

For the development of the sustainable tourism indicator system, it is crucial that companies and destinations in the STF programme participate in the collection of data pertaining to the tourism sector. By improving the quality of data, i.e. increasing the response rate, it is possible to draw reliable conclusions from it. The Border Survey, which is carried out as an interview survey at Finnish borders, complements the data available in the Rudolf statistical database, STF Statistics and DataHub.

International comparisons are also important and help to outline the trends of different countries in relation to each other. The development of EU tourism statistics is a positive thing, and several new statistics have been published in the database during the year. Unfortunately, the fate of the European Tourism Indicators System for Sustainable Destination Management (ETIS) remains unclear. This standard for measuring tourism has not been updated, and it seems unclear who will coordinate the European Tourism Indicator System in the future. It would be natural that the European Tourism Indicator System and EU tourism statistics would be handled as a single entity. The entire European tourism sector would benefit from a common standard for measuring tourism and a database for comparing statistics. This would be a good opportunity for the EU to take over the coordination task.

Safety is a cross-cutting theme related to economic, social and ecological impacts.

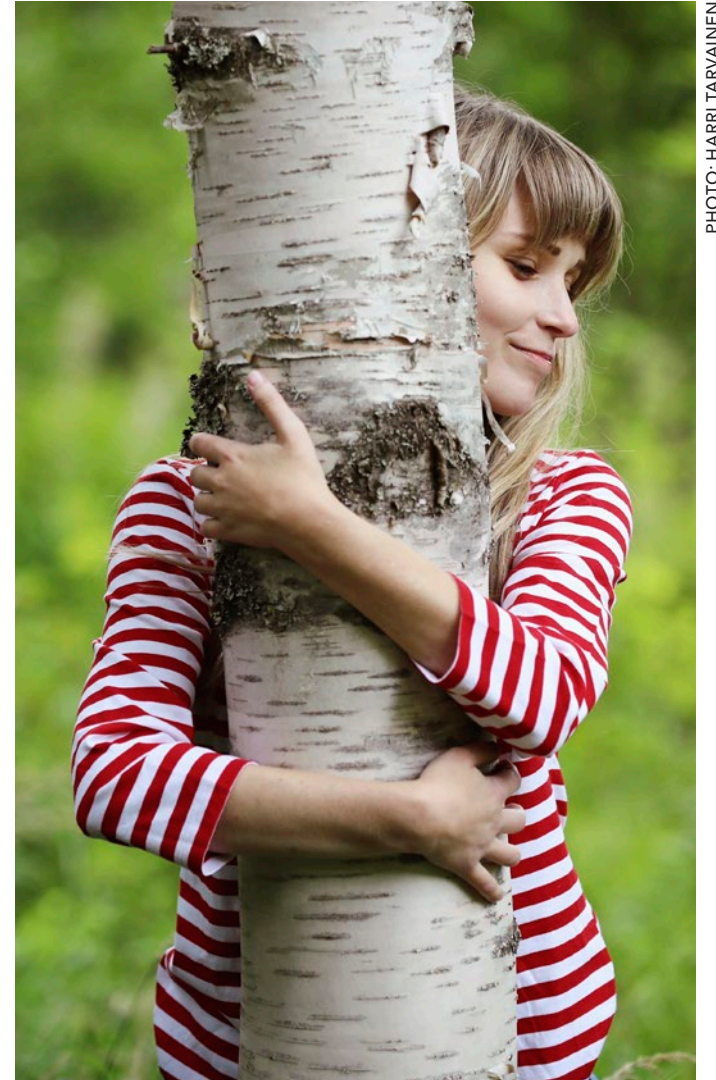


PHOTO: HARRI TARVAINEN

When developing the national sustainable tourism indicator system forward, it would be essential to try to distinguish between will and actual impact when it comes to change indicators (strategic–real). It may not be practical to increase the number of indicators, and dual impact indicators provide information more extensively. The measurement of the tourism sector should also be developed regionally and from the point of view of destinations to obtain sufficient information on specific regional characteristics. By assembling the key indicators together, it would be possible to build a compact annual Tourism Barometer.¹⁷²

The long-term resources of sustainable tourism development and the STF programme are uncertain.

In the future, the reporting of the largest tourism companies will also be affected by the EU Sustainability Reporting Directive (CSRD), which will gradually extend to an increasing number of companies and thus harmonise corporate responsibility reporting.

Training and information sharing will remain important measures to promote sustainable tourism in Finland.

Due to the general economic situation internationally and in Finland, less resources are being distributed to development and research activities that often only bear fruit later. However, fundamentally transforming the entire sector on a sustainable basis while growing it at the same time requires development work and perseverance. It is also important to precisely define the long-term goals of the STF programme, as well as the limits to sustainable growth in tourism.

THE NUMERICAL TARGETS FOR THE 2024 STF PROGRAMME ARE:

- **Increase the number of companies participating in the STF programme to 1,250.**
- **Increase the number of STF-labelled companies by almost a hundred to 480 companies.**
- **Increase the number of STF-labelled destinations by three to eight.**
- **Add 1,500 sustainable tourism products in DataHub.**

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Appendices

Appendix 1

Indicators and statistics of the State of Sustainable Tourism 2023 report

Appendix 2

STF indicator form 2023 for destinations, available at: <https://www.visitfinland.fi/4960b5/globalassets/visitfinland.fi/vf-julkaisut/2024/stf-indikaattorilomake-2023-yri-tykset.pdf>

Appendix 3

STF indicator form 2023 for companies, available at: <https://www.visitfinland.fi/4960b5/globalassets/visitfinland.fi/vf-julkaisut/2024/stf-indikaattorilomake-2023-des-tinaatit.pdf>

State of Sustainable Tourism Report 2023

INDICATORS AND STATISTICS

DESTINATION MANAGEMENT

ID	STF indicators	Value	Sample/Share	Source:	Year	SDG	ETIS criteria (2016)	GSTC code
	Companies participating in the STF programme (by the end of 2023)	1180	Entire tourism sector	STF STATISTICS	2023		A.1.1 Percentage of tourism enterprises/ establishments in the destination using a voluntary certification/labelling for environmental/ quality/ sustainability and/or Corporate Social Responsibility measures	A4 Enterprise engagement and sustainability standards
	Destinations included in the STF programme (by the end of 2023)	65	Entire tourism sector	STF STATISTICS	2023			
A.1.1	Number of STF-labelled companies (by the end of 2023)	387	STF programme companies	STF STATISTICS	2023	12b	A.1.1 Percentage of tourism enterprises/establishments in the destination using a voluntary certification/labelling for environmental/ quality/ sustainability and/or Corporate Social Responsibility measures	A4 Enterprise engagement and sustainability standards
	Number of STF-labelled destinations (by the end of 2023)	5	STF programme companies	STF STATISTICS	2023			
	Number of companies that have completed the indicator form	322	STF programme companies	STF STATISTICS	2023			
	Number of destinations that have completed the indicator form	19	STF programme companies	STF STATISTICS	2023			
A.1.3	Share of STF-labelled tourism products in Visit Finland DataHub	18 %	DataHub products	DataHub statistics	19.2.2024	12b	A.1 Sustainable tourism public policy	

ECONOMIC VALUE

ID	STF indicators	Value	Sample/Share	Source:	Year	SDG	ETIS criteria (2016)	GSTC code
B.1.1	Number of overnight stays per year	23 million	Entire tourism sector	Rudolf statistical database, Statistics Finland	2023	11, 12, 8, 9	B.1.1 Number of tourist nights per month	A8 Managing visitor volumes and activities B1 Measuring the economic contribution of tourism
B.1.11	Number of months open	11,2	STF programme companies	STF STATISTICS	2023	11, 12	B.2.2 Occupancy rate in commercial accommodation establishments per month and average for the year	A8 Managing visitor volumes and activities
B.1.12	Share of international tourists to all tourists	23 %	All of Finland	Rudolf statistical database, Statistics Finland	2022	8	B.1 Tourism Flow (volume & value) at the Destination	A8 Managing visitor volumes and activities
B.1.13	Share of year-round tourism businesses	84 %	STF programme companies	STF STATISTICS	2023	11, 12	B.1 Tourism Flow (volume & value) at the Destination	A8 Managing visitor volumes and activities
B.1.7	Annual tourism consumption in Finland	EUR 14.8 billion	All of Finland	Rudolf statistical database, Statistics Finland	2022	8	B.1 Tourism Flow (volume & value) at the Destination	B1 Measuring the economic contribution of tourism
B.2.1a	Average tourist stay at an accommodation establishment (nights)	2,3	STF programme companies	STF STATISTICS	2022	8	B.2.1 Average length of stay of tourists (nights)	A8 Managing visitor volumes and activities
B.2.1b	Average tourist stay at an accommodation establishment (nights)	2	Entire tourism sector	Rudolf statistical database, Statistics Finland	2022	8	B.2.1 Average length of stay of tourists (nights)	A8 Managing visitor volumes and activities
B.3.1	Tourism's direct impact on total employment	5,10 %	Entire tourism sector	Rudolf statistical database, Statistics Finland	2022	1, 8, 9	B.3.1 Direct tourism employment as percentage of total employment in the destination	B1 Measuring the economic contribution of tourism
B.3.2	Number of seasonal workers as a percentage of tourism employees	32,15 %	STF programme companies	STF STATISTICS	2023	8, 10	B.3.2 Percentage of jobs in tourism that are seasonal	B2 Decent work and career opportunities
B.3.3	Amount of training related to sustainable tourism (training organised by destinations)	104	All of Finland	STF STATISTICS	2023	4, 8	B.3 Quantity and quality of employment	B2 Decent work and career opportunities
B.1.2	Share of day-trippers	11 %	All of Finland	BORDER SURVEY	3/2023-3/2024	8	B.1.2. Number of same-day visitors per month	A8 Managing visitor volumes and activities
B.1.4b	Average daily spending per tourist	72 €	All of Finland	BORDER SURVEY	3/2023-3/2024	8	B.1.4 Daily spending per overnight tourist ja B.1.5 Daily spending per same-day visitors	B1 Measuring the economic contribution of tourism

ID	Other metrics	Value	Sample/Share	Source:	Year	SDG	ETIS criteria (2016)	GSTC code
	Arrivals in accommodation establishments	11.53 million	All of Finland	Rudolf statistical database, Statistics Finland	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Arrivals in Finland	4.293 million	All of Finland	BORDER SURVEY	3/2023-3/2024	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Accommodation capacity (bed-places) incl. hotels, campsites, short term rental	256 880	All of Finland	EU TOURISM DASHBOARD	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism

	Accommodation capacity (bed-places) incl. rooms in accommodation establishments, cottages and other accommodation facilities and their bed-places	165 989	All of Finland	Rudolf statistical database, Statistics Finland	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Occupancy rate (percentage of time the accommodation is occupied)	38,04 %	All of Finland	EU TOURISM DASHBOARD	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Occupancy rate (percentage of time the accommodation is occupied)	34,8%	All of Finland	Rudolf statistical database, Statistics Finland	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Progress in tourism recovery (%)	95 %	All of Finland	EU TOURISM DASHBOARD	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Seasonality of tourism (coefficient of variation)	35,45	Entire tourism sector	EU TOURISM DASHBOARD	2022	8	B.2 Tourism enterprise(s) performance	B1 Measuring the economic contribution of tourism
	Dependency on top 3 countries of origin (%). 1. Germany, 2. the United Kingdom, 3. Sweden	7,70 %	Entire tourism sector	Rudolf statistical database, Statistics Finland	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Share of employment in SMEs in the tourism sector	73,80 %	Entire tourism sector	EU TOURISM DASHBOARD	2022	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Share of e-commerce sales	58,4 %	Entire tourism sector	EU TOURISM DASHBOARD	2022	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Enterprise using social media (%)	65 %	Entire tourism sector	EU TOURISM DASHBOARD	2021	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Internet speed at tourist destinations	76 %	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Personnel training on digital skills	22,7 %	Entire tourism sector	EU TOURISM DASHBOARD	2022	8	B.2 Tourism enterprise(s) performance	B8 Access for all
SOCIAL AND CULTURAL IMPACT								
ID	STF indicators	Value	Sample/Share	Source	Year	SDG	ETIS criteria (2016)	GSTC code
C.1.1a	Number of tourists per 100 residents (number of nights spent in accommodation establishments per 100 permanent residents per day)	1,09	All of Finland	Rudolf statistical database, Statistics Finland	2022	11, 12	C.1.1 Number of tourists/visitors per 100 residents	
C.1.5	Number of tourists in relation to the area of the region (km2) (number of nights spent in accommodation establishments per day per square kilometre)	0,18	All of Finland	Rudolf statistical database, Statistics Finland	2022			A8 Managing visitor volumes and activities
C.4.1a	Share of companies providing services for persons with reduced mobility	11 %	Of STF-labelled companies	STF STATISTICS	2024	10	C.4.1 Percentage of rooms in commercial accommodation establishments accessible for people with disabilities	B5 Preventing exploitation and discrimination B8 Access for all
C.4.1b	Share of companies providing services to an LGBTQ+ audience	33 %	Of STF-labelled companies	STF STATISTICS	2024	10	C.4 Inclusion/accessibility	B5 Preventing exploitation and discrimination B8 Access for all
C.4.4a	Percentage of STF-labelled tourism products that market services to people with reduced mobility	24 %	DataHub STF companies	DataHub statistics	2024	10	C.4 Inclusion/accessibility	B5 Preventing exploitation and discrimination B8 Access for all
C.4.4b	Percentage of STF-labelled tourism products that market services to an LGBTQ+ audience	6 %	DataHub STF companies	DataHub statistics	2024	10	C.4 Inclusion/accessibility	B5 Preventing exploitation and discrimination B8 Access for all
C.4.5	Multilingualism of communication (average number of language versions of websites)	3	STF programme companies	STF STATISTICS	2023	10		
C.5.2a	Number of destinations with UNESCO World Heritage, Intangible Cultural Heritage, Cultural Routes (Council of Europe), or Geoparks status	139	All of Finland	The Finnish Heritage Agency, UNESCO, Council of Europe	2023	11	C.5.2 Percentage of the destination's events that are focused on traditional/local culture and heritage 2013: C.4.1 Percentage of sites subject to a policy or plan for the protection of cultural heritage	C1 Protection of cultural assets
C.5.2b	Number of built cultural environments of national significance	1472	All of Finland	The Finnish Heritage Agency	2023	11	C.5.2 Percentage of the destination's events that are focused on traditional/local culture and heritage 2013: C.4.1 Percentage of sites subject to a policy or plan for the protection of cultural heritage	C1 Protection of cultural assets
ENVIRONMENTAL IMPACT								
ID	STF indicators	Value	Sample/Share	Source	Year	SDG	ETIS criteria (2016)	GSTC code
D.2.1	Share of companies actively engaged in climate change mitigation activities	99 %	STF programme companies	STF STATISTICS	2023	13	D.2.1 Percentage of tourism enterprises involved in climate change mitigation schemes – such as: CO2 offset, low energy systems, etc.– and 'adaptation' responses and actions	D2.1 Greenhouse gas emissions (industry criteria)
	Average number of actions to mitigate climate change	15	STF programme companies	STF STATISTICS	2023	13	D.2.1 Percentage of tourism enterprises involved in climate change mitigation schemes – such as: CO2 offset, low energy systems, etc.– and 'adaptation' responses and actions	D2.1 Greenhouse gas emissions (industry criteria)
D.2.1.1	Share of companies that measure their carbon footprint	49 %	STF programme companies	STF STATISTICS	2023	13	D.2.1 Percentage of tourism enterprises involved in climate change mitigation schemes – such as: CO2 offset, low energy systems, etc.– and 'adaptation' responses and actions	D10 GHG emissions and climate change mitigation

D.3.4	Average amount of separately recycled waste in customer premises	4 %	STF programme companies	STF STATISTICS	2023	12, 14, 15	D.3.2 Percentage of tourism enterprises separating different types of waste	D2.4 Solid waste (industry criteria)
D.3.4	Average amount of separately recycled waste in business premises	6 %	STF programme companies	STF STATISTICS	2023	12, 14, 15	D.3.2 Percentage of tourism enterprises separating different types of waste	D2.4 Solid waste (industry criteria)
D.5.2	Share of companies with measures to reduce water consumption	90 %	STF programme companies	STF STATISTICS	2023	6	D.5.2 Percentage of tourism enterprises taking actions to reduce water consumption	D1.4 Water conservation (industry criteria)
	Average number of actions to reduce water consumption	3	STF programme companies	STF STATISTICS	2023	6	D.5.2 Percentage of tourism enterprises taking actions to reduce water consumption	D1.4 Water conservation (industry criteria)
D.6.2	Share of companies with measures to reduce energy consumption	96 %	STF programme companies	STF STATISTICS	2023	7	D.6.2 Percentage of tourism enterprises that take actions to reduce energy consumption	D1.3 Energy conservation (industry criteria)
	Average number of actions to reduce energy consumption	7	STF programme companies	STF STATISTICS	2023	7	D.6.2 Percentage of tourism enterprises that take actions to reduce energy consumption	D1.3 Energy conservation (industry criteria)
D.6.3	Share of renewable energy consumed annually (MWh) of total energy consumption	69 %	STF programme companies	STF STATISTICS	2023	7	D.6.3 Percentage of annual amount of energy consumed from renewable sources (MWh) compared to overall energy consumption at destination level per year	D1.3 Energy conservation (industry criteria)
D.7.1	Percentage of tourism companies actively supporting the protection, conservation and management of local biodiversity	41 %	STF programme companies	STF STATISTICS	2023	14, 15	D.7.1 Percentage of local enterprises in the tourism sector actively supporting protection, conservation and management of local biodiversity and landscapes	D3.1 Biodiversity conservation (industry criteria)
	Average number of actions promoting biodiversity	5	STF programme companies	STF STATISTICS	2023	14, 15	D.7.1 Percentage of local enterprises in the tourism sector actively supporting protection, conservation and management of local biodiversity and landscapes	D3.1 Biodiversity conservation (industry criteria)
D.7.1.3	Nature reserves and national parks as a percentage of the total area	9,2 %	All of Finland	Metsähallitus, Statistics Finland	2023	14, 15	D.7.1 Percentage of protected area (surface area, km2) of site (2013)	D2 Visitor management at natural sites
D.7.1.1	Percentage of local tourism companies that use sustainable and organic products as part of their food services	62 %	STF programme companies	STF STATISTICS	2023			D2.6 Minimize pollution (industry criteria)
	Average number of actions contributing to sustainable food choices	3	STF programme companies	STF STATISTICS	2023			D2.6 Minimize pollution (industry criteria)
D.7.1.2	Share of companies in the STF programme that operate in national parks and other nature conservation areas managed by Metsähallitus and have a sustainable tourism agreement with Metsähallitus	92 %	STF programme companies	STF STATISTICS	2023	14, 15		D1 Protection of sensitive environments D2 Visitor management at natural sites D3.3 Visits to natural sites (industry criteria)
ID	Other metrics	Value	Sample/Share	Source	Year	SDG	ETIS criteria (2016)	GSTC code
	Distribution of mode of transport upon arrival %	By air 62% By sea 38%	All of Finland	BORDER SURVEY	2023	9, 13	D.1.1 Percentage of tourists and same-day visitors using different modes of transport to	D11 Low-impact transportation
	Average climate impact of the trip (CO2e kg) per day	41 CO2e kg	Foreign tourists	BORDER SURVEY	2023	13	D.1.4 Average carbon footprint of tourists and same-day visitors travelling from home to the destination	D10 GHG emissions and climate change mitigation
	Number of Finnish companies and destinations committed to the Glasgow Declaration	71	Entire tourism sector	SIGNATORIES OF THE GLASGOW DECLARATION	2023	13	D.2.1 Percentage of tourism enterprises involved in climate change mitigation schemes – such as: CO2 offset, low energy systems, etc.– and 'adaptation' responses and actions	D10 GHG emissions and climate change mitigation
	Number of visitors to national parks, national hiking areas and customer service points	8.7 million	All of Finland	METSÄHALLITUS	2023	14, 15, 12	D.7.1 Percentage of conservation area (surface area, km2) of the site	D2 Visitor management at natural sites
	Average emission intensity of flights (kg CO2/passenger)	124,44	All of Finland	EU TOURISM DASHBOARD	2022	13	D.2 Climate change	D10 GHG emissions and climate change mitigation
	Greenhouse gas intensity of tourism (kg/million EUR) (2019)	59	All of Finland	EU TOURISM DASHBOARD	2021	13	D.2 Climate change	D10 GHG emissions and climate change mitigation
	Energy intensity of tourism (GJ/EUR million)	2	All of Finland	EU TOURISM DASHBOARD	2020	7	D.6 Energy usage	D5 Energy conservation
	Share of train journeys	15,00 %	All of Finland	EU TOURISM DASHBOARD	2022	9, 13, 11	D.1 Reducing transport impact	D11 Low-impact transportation
	Excellent bathing water (%)	90,64 %	All of Finland	EU TOURISM DASHBOARD	2022	6, 14	D.5 Water management	D7 Water quality
	Dependence on long-haul tourist markets (%)	8,10 %	All of Finland	EU TOURISM DASHBOARD	2022	13, 11	D.1 Reducing transport impact	D11 Low-impact transportation
	Satisfaction with the work community (my colleagues treat me fairly, support me in my work, I feel like part of my work community)	86,00 %	All of Finland	PAM member survey	2023			
	Prospects for advancement at work		All of Finland	PAM member survey	2023			
	Skills and training opportunities, scale 1-4	74,00 %	All of Finland	PAM member survey	2023			
	Interest in changing the industry	54,00 %	All of Finland	PAM member survey	2023			
	Job satisfaction, scale 1-7 (own work, work-life balance, satisfaction with one's opportunities to influence)		All of Finland	PAM member survey	2023			
	Significant nature-based tourism potential	19 %	All of Finland	EU TOURISM DASHBOARD	2023	14, 15, 12	D.7.1 Percentage of conservation area (surface area, km2) of the site	D2 Visitor management at natural sites