State of Sustainable Tourism

Visit Finland

SUSTAINABLE TRAVEL FINLAND™

ANNUAL REPORT

2024

Contents

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FOREWORD
Travelling within the Sustainable Boundaries

Visit Finland's mission is to promote Finland's appeal as an internationally sustainable and attractive travel destination and to support the sustainable international growth of tourism companies and regions. Our vision is ambitious: Finland is the leading destination for sustainable tourism — the first choice of a mindful traveller. This vision is being built with determination: by increasing knowledge, creating new forms of collaboration, and strengthening indicators that enable transparent and open assessment of tourism's overall impacts. The *Sustainable Travel Finland* (STF) program and its tools offer a concrete pathway for Finland to further develop its position as a sustainable and competitive destination.

Tourism is a globally growing industry. According to the World Travel & Tourism Council (WTTC), tourism's share of global GDP is expected to grow at an annual rate of 3.7% between 2024 and 2034, compared to 2.4% for the global economy overall. Ensuring the sustainability of this growth also means taking on greater responsibility and redefining how success is measured. For this reason, one of Visit Finland's key focus areas has been to work with the industry to create a system that measures, sets thresholds, and generates data on tourism's impacts — not only on the economy, but also on communities and the environment — and, most importantly, seeks a balance between them.

Shared goals and measurable indicators help the entire industry participate in actions that support sustainable growth and encourage responsible practices. This work is already bearing fruit: Finland has been recognized in several

More information is available than ever before. The absence of data can no longer be an excuse for inaction — evidence-based measures that advance sustainability must become the norm.

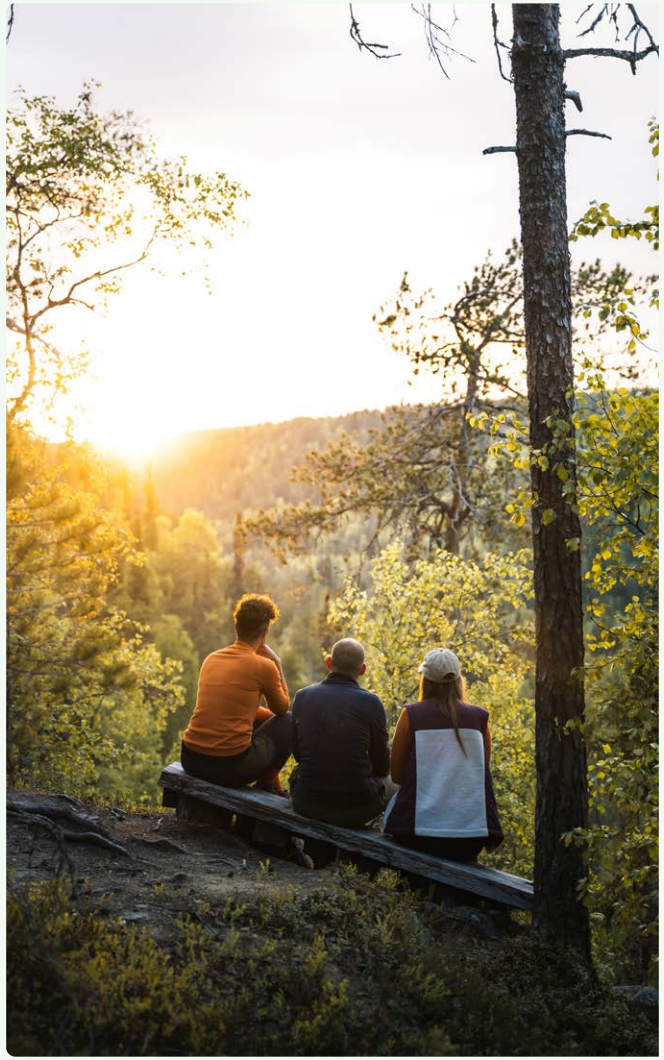
international studies as a country known for sustainable tourism. Helsinki's top ranking in the respected Global Destination Sustainability (GDS) Index is also a testament to the systematic and holistic sustainability work being done in Finland's travel sector.

The State of Sustainable Tourism in Finland 2024 report highlights the importance of understanding the boundaries of tourism sustainability. Tourism affects the economy, the state of the natural environment, the lives of local communities, and cultural resilience. This report aims to provide a snapshot of where Finland currently stands on the path toward sustainable tourism, and where the opportunities and areas for development lie. At the same time, it brings visibility to progress made — such as the impact of the STF program, increased local engagement, and the development of nature-positive approaches.

Finland's tourism appeal is rooted in nature, happiness, silence, and authenticity — values

PHOTO **JUHO KUVA**

PHOTO **FALKE SPORTS / ROVANIEMI**



whose preservation requires active measures. Regenerative and nature-positive tourism approaches explore how tourism can leave a positive handprint on the environment and communities. These approaches represent a shift toward a more holistic, systemic sustainability transformation that recognizes tourism's potential to enhance biodiversity, societal well-being, and cultural vitality. The sustainability transition in tourism is about evolving practices, clarifying values, and rethinking impact.

Expectations around safety, climate-resilient solutions, and local participation demand a new kind of responsibility mindset and leadership from tourism operators. To support this, we need new indicators that monitor the state of local communities and nature. Visit Finland utilizes and refines existing high-quality data sources and also produces new data. The STF indicator system, the Matkailijamittari Border Survey, and the Rudolf statistics database offer a comprehensive foundation for monitoring tourism success.

We hope this report serves as a snapshot, a source of inspiration, a conversation starter, and a guide for everyone involved in building a sustainable tourism sector in Finland — from businesses and regional organisations to policymakers and researchers. Together, we must ensure that tourism growth is also socially and ecologically sustainable. Sustainable tourism is not just a destination — it is a continuous journey that requires the alliance of knowledge, collaboration, and bold decision-making.

Liisa Kokkarinen
Head of Sustainable Development, Visit Finland

Katarina Wakonen
Head of Business Intelligence, Visit Finland

PHOTO **FALKE SPORTS**

SUMMARY

Visit Finland develops the prerequisites for sustainable tourism, with the vision of positioning Finland as a leading destination for sustainable tourism. The State of Sustainable Tourism report highlights the key themes of sustainable tourism that emerged in 2024, including local engagement, nature positiveness, and emissions from air travel.

Carrying capacity is a balance between the environment, communities and the economy.

The report describes the current state of sustainable tourism based on, among other things, the indicator data of the STF programme and European benchmarking data. The report supports both the national tourism strategy and Visit Finland's strategic goals of promoting economic growth, sustainable development and competitiveness.

Although there have been efforts to define the boundaries of sustainability in tourism for more than half a century, the question is more topical than ever: what kind of boundaries could be set for sustainable tourism? Carrying capacity is not only a question of visitor numbers, but it is a multidimensional balance between the environment, communities and the economy. The carrying capacity of tourism is exceeded if even one dimension of sustainability is compromised — this is why continuous measurement and informed decision-making are needed.

The State of Sustainable Tourism 2024 report examines the boundaries of tourism sustainability, especially from the perspectives of culturally and socially sustainable tourism and nature positiveness. The report identifies good practices to minimise the social and ecological disadvantages of tourism. In Rovaniemi, residents have been actively involved in tourism development, while on the lighthouse island of Bengtskär, tourism is harnessed to protect the endangered common eider. It is also recognised that taking into account visitor carrying capacity and the quality of life of local communities, as well as identifying the potential of nature-positive solutions, are key development priorities for the future of sustainable tourism.

This State of Sustainable Tourism report includes an overview of Visit Finland's Climate Action Plan (CAP), which has been prepared in accordance with the obligations of the Glasgow Declaration on Climate Action in Tourism. The CAP guides our industry towards carbon neutrality on five common pathways: measure, decarbonise, regenerate, collaborate and finance. A new perspective highlighted is climate change adaptation, which is vital for the tourism sector due to its vulnerability to climate-related risks. The report emphasises that the tourism industry must take a more active role in addressing the challenging emissions from air and road transport, for example by promoting longer stays.

The *Sustainable Travel Finland* (STF) programme was launched in 2020. In 2024, the programme's sustainable tourism development path was already traversed by 1,436 companies, which is 256 more than in the previous year. STF has accelerated the sustainability transition in the tourism sector by strengthening and sharing relevant information, creating networks and encouraging organisations to take concrete action. For example, all STF businesses participate in actions to mitigate global warming, and nearly a half systematically measure their own carbon footprint.

Sustainable tourism in Finland is progressing, but change is still needed in all areas of sustainability. The report finds that crossing the boundaries of sustainability intensifies various symptoms in nature, local communities and tourists. Thus, recognising and respecting boundaries will safeguard the sustainability and vitality of tourism also in the future. In the end, sustainability isn't just about metrics and reports — it's about commitment, rethinking, choices, attitudes, and long-term collaboration. The halving of Visit Finland's funding for 2025 will also cause significant changes in sustainable tourism support processes.

PHOTO **HARRI TARVAINEN**

Tourism Sustainability in Finland 2024

change from 2023

STF programme key figures[1]

500 +29 %
Companies with STF label

297 +9 %
Companies joined STF programme

11 +6
Destinations with STF label

70 +8 %
Destinations in STF programme

Environmental actions by companies in the STF programme[1]

prev. 99 %
100%
participates in climate change mitigation efforts

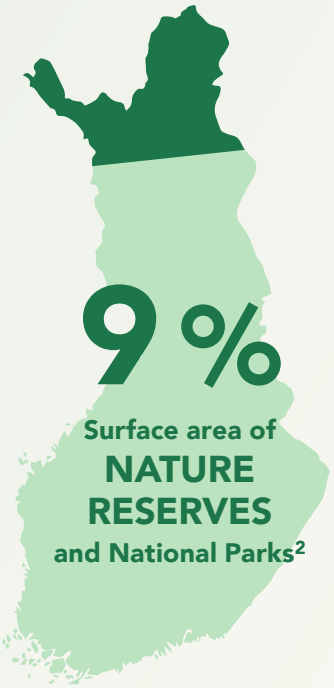
-6 % pps
46%
measure their carbon footprint

+15 % pps
84%
share of renewable energy in total energy consumption

+2 % pps
92%
works to reduce water consumption

no change
63%
makes sustainable choices in food catering

-1 % pps
41%
contributes to biodiversity conservation efforts



9 %
Surface area of **NATURE RESERVES** and National Parks[2]

1471
Nationally significant **BUILT CULTURAL ENVIRONMENTS** in the country[3]

Safety[4] Finland's Ranking in Index

1 — **7** — 50 (+3)

Resbonsibility in International Peace and Security

Index is part of Anholt Nation Brands Index, which uses extensive survey data to measure the power of different nation brands and the attractiveness of countries.

1 — **22** — 203

LGBTQ+ Travel Safety

Ranks countries based on how LGBTQ+ friendly they are as travel destinations, considering non-discriminatory legislation, violence against transgender people, and societal attitudes toward sexual and gender minorities.

1 — **4** — 119 (+9)

Safety & Security

World Economic Forum publishes Travel and Tourism Development Index (TTDI), that measures the development of tourism across different countries. Safety and Security pillar measures the extent to which a country exposes locals, tourists and businesses to security risks.

1. Sustainable Travel Finland Programme
2. Parks & Widlife Finland, Statistics Finland
3. The Finnish Heritage Agency
4. Anholt Nation Brands Index (NBI), LGBTQ+ Travel Safety Index, The World Economic Forum's Travel & Tourism Development Index (TTDI)

Visit Finland

SUSTAINABLE TRAVEL FINLAND™

INTRODUCTION

PHOTO **JUHO KUVA**

Visit Finland is ambitiously developing sustainable tourism in Finland. The State of Sustainable Tourism 2024 is the third national sustainable tourism annual report in its series. It brings together sustainable tourism indicator data from the *Sustainable Travel Finland* (STF) programme, mirrors the situation of sustainable tourism in Finland to other European countries and highlights the themes discussed in 2024. The implementing partner of the report is FCG Finnish Consulting Group.

The aim of Finland's national tourism strategy (2022—2028)[1] is to make Finland the most sustainably growing tourist destination out of the Nordic countries. The national and Visit Finland strategy 2021—2025[2] focuses on economic growth, sustainable development and competitiveness, which Visit Finland implements by developing the prerequisites for sustainable tourism in Finland. The goal of sustainable tourism is to benefit tourists, businesses, tourist destinations and locals alike, not forgetting the enabling environment.

The State of Sustainable Tourism 2024 report considers the boundaries of sustainability in tourism. The report examines, in particular, culturally and socially sustainable tourism, as well as the role of the tourism industry as a driver of nature positiveness. The congestion of popular destinations and the attitudes of local residents towards tourism have emerged in 2024, especially in popular destinations in Europe, but also in Finland.

Visit Finland's Climate Action Plan and its monitoring are linked to the State of Sustainable Tourism report for the first time. Accelerating climate change increases the need for information and concrete climate actions. In 2024, the increasing prevalence of extreme weather phenomena around the world and in Europe has been a hot topic. Forest fires, heat, floods and the unpredictability of weather conditions directly affect the operating environment of the tourism industry and the safety of tourists. Other security issues have also risen to the agenda of the tourism industry.

Climate Action Plan is now part of the report.

The *Sustainable Travel Finland* (STF) programme aims to strengthen the sustainability competence of its participants and the entire tourism sector, as well as to enhance the measurement of sustainability. The State of Sustainable Tourism report reviews the progress of the STF programme in 2024. The data collected through the indicator system supports the identification of both strengths and areas for development across the sector. To improve the quality and comprehensiveness of the data gathered through the programme, it is essential that stakeholders participate more actively in data collection and in updating their annual information.

[1] TEM (2022)
[2] Business Finland (2020)

Indicator Sources

FOR THE NATIONAL SUSTAINABLE TOURISM INDICATOR SYSTEM

- **European Commission**
- **Global Peace Index GPI**
- **LGBTQ+ Travel Safety Index**
- **Parks & Widlife Finland**
- **The Finnish Heritage Agency**
- **Service Trade Union PAM**
- **Travel & Tourism Development Index (TTCI)** by WEF (World Economic Forum)
- **Visit Finland’s Matkailijamittari Border Survey**
- **Visit Finland's Sustainable Travel Finland Programme**
- **Visit Finland’s Rudolf Statistics Database**
- **Visit Finland Travel DataHub**
- **World Risk Report**
- **UNESCO**

PHOTOS **PETRI JAUHIAINEN, ELINA MANNINEN/KEKSI, GABI SHANNA** AND **NORA WILSON**

PHOTO **ANTTI PIETIKÄINEN**

1 Sustainable Growth Requires the Recognition of Boundaries

PHOTO **HARRI TARVAINEN**

Both internationally and in Finland, the boundaries and limits of tourism have gained increasing attention in public discourse. Efforts to define the boundaries of tourism sustainability began as early as the 1960s, when the concept of carrying capacity was introduced in tourism research and the sustainability paradigm started to emerge. Many of the principles of sustainable tourism are based on the theory of carrying capacity. Carrying capacity in tourism refers to the maximum number of tourists that the destination can sustainably receive without causing significant negative impacts on the environment, society, people and culture.[3] Carrying capacity is exceeded when any one dimension of sustainability is compromised. In such cases, the different aspects of sustainability are no longer in balance with one another.

Establishing an objective and absolute threshold for a destination's carrying capacity has proven challenging, as carrying capacity is not solely related to specific resources, visitor

[3] Kennel 2014

numbers, or the intensity of impacts. It is also a question of human values and, more broadly, of evolving understandings of resources, criteria, indicators, and impacts.[4] Certain physical boundaries are defined by factors such as accommodation capacity, infrastructure, processing capacity, and the resilience of the natural environment to pressure. One sign that the social limits of sustainability have been breached is the emergence of negative reactions among local residents. This indicates a surpassing of tolerance thresholds, suggesting that tourism may be causing adverse effects. Tolerance can be exceeded when visitor numbers are disproportionate to the local population or land area. Additionally, the availability of skilled labour and the capacity to deliver tourism in a safe and controlled manner set important limits and pose challenges to tourism growth.

In Finland, a lot of information is collected about the sustainability of tourism and there's data available more than ever. The information enables Visit Finland and other stakeholders to monitor the development of tourism and make informed decisions. By collecting both quantitative and qualitative data, it is possible to monitor the impact of tourism on the environment, the well-being of the local population and economic profitability. It is essential to create clear and measurable goals that guide tourism activities towards sustainability, as the goals and indicators of the STF programme seek to do.

In certain respects, we could therefore set quantitative limits for tourism, for example, in terms of infrastructure carrying capacity. When it comes to social sustainability or the carrying capacity of nature, it is more difficult to predefine boundaries because of their complexity. The impact or limits of tourism must always be considered locally, as local conditions and values influence the creation of effects and how they are experienced.[3] A given number of tourists may cause significantly greater impacts in one location than in another. The limits of carrying capacity can be exceeded in different

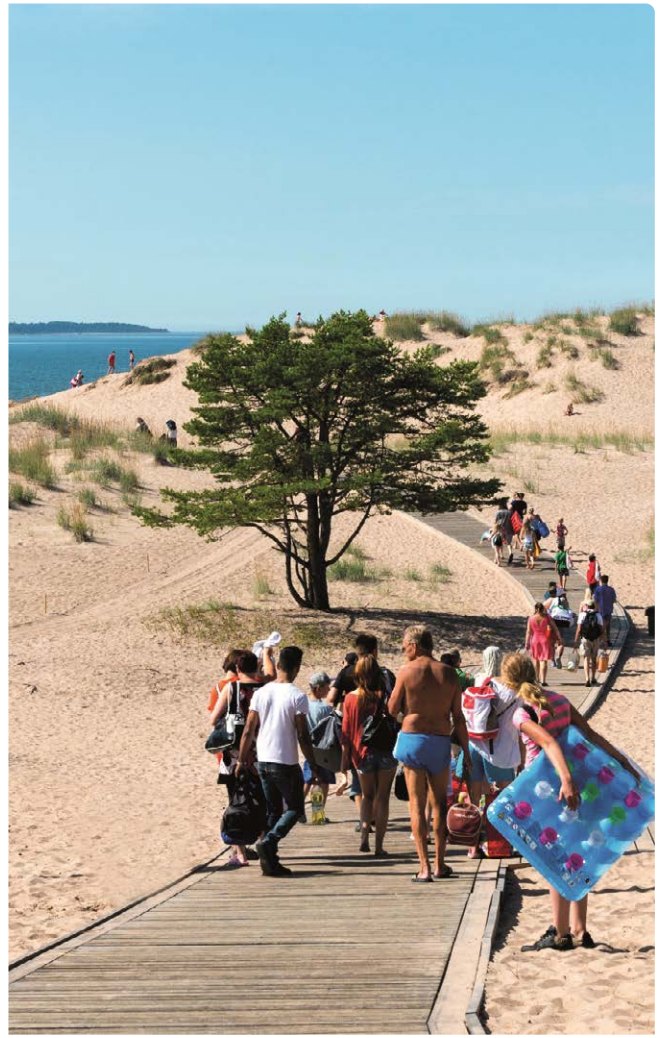


PHOTO **MAISA.FI**

[4] Saarinen 2006

ways even within a single city — for example, in a specific area or neighbourhood, along a hiking trail, or at a particular attraction. Carrying capacity may also be temporarily exceeded, for instance during peak seasons.[5]

Regular monitoring of selected sustainability indicators, along with their targets and threshold values, is essential to ensure timely responses to changes — for example, signs of environmental degradation. Through planning and evidence-based decision-making, we can prevent the breaching of tourism sustainability limits. By understanding the destination's constraints and unique characteristics, it is possible to proactively safeguard natural values, mitigate negative impacts on local communities, and identify needs for infrastructure development.[6] This requires long-term cooperation and building common understanding between different stakeholders. This is exactly what the STF programme is aiming for.

Various methods have been developed for monitoring impacts and defining boundaries.[4] For example, the LAC method (Limits of Acceptable Change) has been used in Finland in Metsähallitus nature sites to monitor the social, ecological, economic and cultural effects of recreational use.[7] The same method has also been used in Finnish World Heritage Sites, such as Suomenlinna[8] and Verla Groundwood and Board Mill[9].

As we aim for an increase in the number of tourists at the destination, we understand that this growth will have some impact on the area. The LAC method defines the parameters of an approved change or effect. Once the limit values have been set, their development is closely monitored. On this basis, the necessary measures will be drawn up and, if necessary, reacted to in order to keep the effects within the limits of acceptable changes.[10] Central to the LAC method is the monitoring of change with the help of defined indicators, as well as responding to changes.

A similar mindset has also been applied in Helsinki. The City of Helsinki and its stakeholders have made long-term work on different themes of sustainability and in 2024 achieved its goal to be the most sustainable travel destination in the world when measured by the Global Destination Sustainability (GDS) index. At the same time, the goal has also been to increase the number of visitors. In Helsinki, it has been recognised that for growth to be sustainable, it must be managed, balanced with all aspects of sustainability, and its impacts monitored[10]

The impacts or limits of tourism must always be considered locally.

5 European Commission 2022
6 Thraenhart 2024
7 Metsähallitus
8 Suomenlinna
9 UPM 2025
10 The Responsible Tourism Partnership 2025

In 2024, Helsinki prepared an analysis and management plan for the number of visitors to Helsinki, which describes the current state of visitor pressure in Helsinki and the ways in which visitor pressure is measured. In addition, it assesses social and environmental carrying capacity, as well as the challenges posed by seasonality and the duration of stay. The plan also includes possible further development paths.[11]

Although research and development efforts to define the limits of tourism sustainability have been ongoing for decades, continued work is needed to achieve systemic transformation within the tourism sector. The purpose of setting limits is not to restrict the operating conditions or livelihoods of tourism businesses, but rather to strengthen the sustainability of destinations — and thereby the entire operating environment. Without functioning infrastructure, thriving cultural and natural attractions, diverse services, healthy professionals, and the support of local residents, the fundamental conditions for tourism will deteriorate. Defining and monitoring the boundaries of tourism sustainability is a vital first step in the sector's sustainability transition.

Tourism must bring added value to the locals

HELSINKI

The starting point for developing tourism in Helsinki is its local residents. Above all, tourism must bring added value to the people of Helsinki. It is also critically important that tourism does not place an excessive burden on the environment. One of the most significant risks is that visitor flows become too concentrated in certain places and at certain times. That's why it is essential for the city to have a clear plan in place before actual problems arise. With effective destination management, we can grow tourism in the city without allowing problems to emerge. Helsinki already has a preliminary plan, which will be further developed over the coming years. The development of sustainable tourism is a continuous process — it is never complete.

—Jukka Punamäki
Senior Advisor, Tourism
City of Helsinki

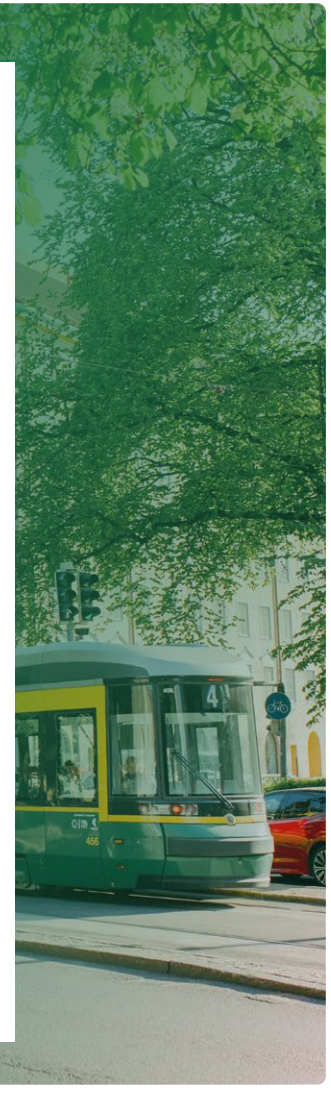


PHOTO JULIA KIVELÄ

[11] City of Helsinki 2025

Boundaries of Sustainable Tourism

Culturally and socially sustainable tourism

Social sustainability in tourism involves considering the needs and perspectives of tourists, local livelihoods, communities, residents, and the workforce throughout the entire tourism process — from planning to implementation. Ideally, tourism services create local employment and support the sale of local products while meeting the needs of visitors. At its best, tourism contributes to the preservation of cultural heritage. Sustainable tourism aims to revive, maintain, and strengthen cultural traditions. Tourism primarily takes place in real environments where local communities live and operate, which makes it essential to address social impacts. Through collaboration, it is possible to promote well-being, respectful treatment, and increased participation. When the needs of both residents and visitors are taken into account, the equitable distribution of tourism's positive impacts becomes easier to achieve.

In both Finland and across Europe, public debate has intensified around appropriate tourist volumes to ensure that local communities perceive tourism as a positive force — rather than a disruptive or restrictive element in their everyday lives. In Southern Europe, recurring themes now include water use restrictions in popular tourist destinations, the negative consequences of short-term rentals, and a shift in local attitudes toward tourism from positive to negative.[12][13][14] The negative impacts of short-term rentals and local criticism of tourism are increasingly being heard in Finland as well.

What measures can be taken at the destination level to address identified risks to social sustainability? How could common threshold values be agreed upon, and how can progress be monitored? A recent study from Toronto Metropolitan University on rethinking the impacts of tourism highlighted a notable shift among representatives from leading sustainable tourism countries: social indicators were identified as the most important emerging measures of success, alongside traditional ecological and economic metrics. Among the 15 destinations interviewed, the most significant value-based indicators included visitor and resident sentiment, local residents' well-being, equity, and inclusion in the employment impacts of tourism.[15]

The interviewees identified several challenges in measuring the performance of value-based tourism. These included the difficulty of quan-

Social indicators as a measure of success.

[12] Helsingin Sanomat 2024
[13] STT 2024
[14] Espanja.com 2024
[15] Dodds R. et al. 2025

tifying abstract concepts, the lack of universal metrics, and the complexity of isolating the specific impacts of tourism. The greatest challenge in data collection was recognized as the lack of high-quality data sources. To mitigate these obstacles, the study participants gathered information from a wide range of sources and conducted their own data collection efforts. They also reported engaging in internal destination marketing and education to shift perceptions and stakeholder mindsets, using local residents as ambassadors.[16] Involving and informing residents and other stakeholders was seen as a fundamental step in increasing the social acceptability of tourism and minimizing its negative impacts.

According to the self-assessments of companies participating in the STF program, businesses are not yet actively conducting regular resident surveys or organizing community meetings to engage with local citizens. In 2023, these were among the least implemented actions, and in 2024 they remained within the five least performed measures. Moving forward, more attention could be jointly directed—at both destination and regional levels—toward fostering participation and listening to local perspectives. Highlighting the benefits of involving local communities and establishing a national model for stakeholder engagement would be of primary importance, as it would make it easier to take concrete action.

According to their self-assessments, the aspect of social sustainability that companies manage best is workplace family-friendliness. This is particularly important in an industry characterized by irregular working hours and part-time employment. Companies also strongly felt that their staff possess a good knowledge of local characteristics, and that customers are treated equally and without discrimination.[17]

Listening to and involving locals is still limited.

PHOTO **VISIT MIKKELI**

[16] Dodds R. et al. 2025
[17] Visit Finland STF self-assessments 2024

PHOTO **RIKU PIHLANTO**

INDIGENOUS TOURISM

A cornerstone of cultural sustainability is respecting the local cultural heritage and preserving its vitality. Local elements can be utilized in tourism services in a truthful way and while preserving local culture. There are about 10,000 Sámi living in Finland, most of whom live outside the Sámi homeland of Finland. As the only indigenous people in the European Union, the Sámi are a central part of the region's uniqueness, which is also reflected in our international tourism marketing. Therefore, understanding the themes of sustainable indigenous tourism applies to the tourism industry nationwide. Interest in indigenous tourism and authentic cultural experiences has grown globally. According to the World Travel & Tourism Council (WTTC), in 2024, almost nine out of ten visitors in Western Australia were interested in indigenous tourism, and more than a third (36%) participated in tourism services provided by Aboriginal Australians.[18]

The only Indigenous tourism certification scheme currently in operation is the Original Original certificate issued by the ITAC (Indigenous Tourism Association of Canada).[19] In 2024, within the Sámi Homeland in Finland, the Sámi Parliament has been developing a set of certification criteria aimed at identifying tourism businesses operating in Finland that are comprehensively sustainable and responsible. This work builds on previous initiatives, including the Ethical Guidelines for Sámi Tourism and the Responsible Sámi Tourism Visitor Guidance.[20]

According to the self-assessment of the STF program, only 17.6% of companies (89 companies) were familiar with the Responsible Sámi Tourism

Understanding sustainable indigenous tourism concerns the tourism industry nationwide.

[18] WTTC 10.10.2024
[19] ITAC 2025
[20] Sámi Parliament 2024

Visitor Guidelines and about a fifth (101 companies) were familiar with the Ethical Guidelines for Sámi tourism. For the most part, company representatives perceived that Sámi tourism was not relevant to their operations, even though the tourism sector in Finland as a whole should develop a deeper understanding of Sámi tourism.

VISITOR RESILIENCE AND ITS MEASUREMENT

In monitoring sociocultural themes, experiential and observational data—and changes therein—are often used. The World Tourism Organization (WTO) suggests that cultural sustainability can be monitored through indicators such as the number of cultural activities and heritage events, as well as by tracking changes in local residents' lifestyles. Indicators of social sustainability include local residents' attitudes and reactions, the frequency and participation levels in tourism-related meetings and dialogue events, the existence of a tourism strategy, and the number of locals benefiting from tourism-related income opportunities.[21]

The concept of visitor resiliency[22], developed in Finland, refers to the autonomous development, transformation, and intergenerational continuity of local ways of life and environments—partly supported by tourism. It emphasizes a forward-looking perspective: visitor resilience seeks to avoid short-sighted or purely commercial alterations to cultural environments. The concept encompasses a destination's capacity, carrying ability, potential, stability, reversibility, and, when necessary, its ability to withstand and respond to disruptions in hosting visitors.[22] Visitor sustainability can be measured, for example, by assessing the extent to which locals are able to enjoy peace in their everyday errands and recreational activities.[22]

Recreational peace is part of visitor resiliency.

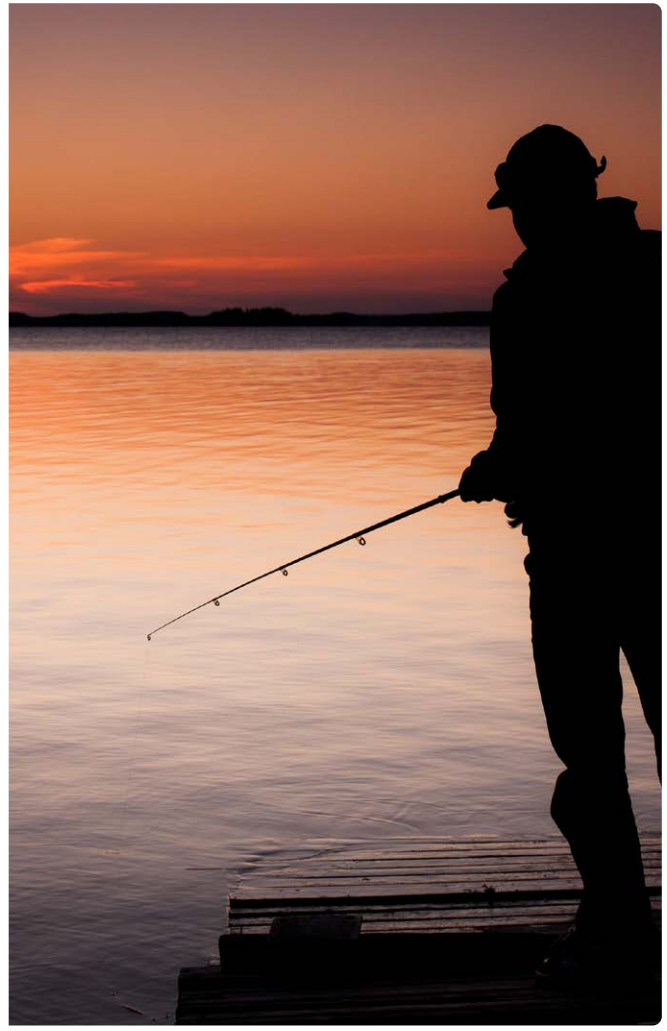


PHOTO VISIT MIKKELI

[21] WTO 2004
[22] Veijola & Kyyrö 2020

A New Era for Tourism in Rovaniemi

ROVANIEMI

In autumn 2023, the project A New Era of Tourism in Rovaniemi was launched to establish a collaborative network and operational model for tourism development in the region. The initiative brings together city officials, residents, tourism operators, and developers. The project is based on Rovaniemi's Sustainable Tourism Action Plan, which outlines eleven measures aimed at reducing the local side effects of tourism, mitigating climate change, and increasing the involvement of businesses and the local population in tourism development.

In autumn 2024, the Rovaniemi Forum brought together over 40 residents to discuss tourism sustainability and share their hopes and concerns. In addition, the project includes four 'idea cafés' for residents and a separate series of dialogue events based on the results of a tourism survey. A comprehensive resident survey was conducted in 2024 to assess the impacts of tourism and gather local perspectives on how tourism should be developed. The survey received over 3,000 responses. Both the resident events and the survey have been positively received by the community.

The continuity of the tourism development working group has been secured through an official decision. The group meets regularly to address tourism-related themes, such as transportation planning. Its goal is to examine tourism from multiple perspectives and coordinate aspects related to sustainable tourism development and the controlled growth of the sector. The aim is to strengthen and develop cross-sectoral cooperation in tourism in Rovaniemi, ensuring that the industry grows and evolves sustainably. The working group includes key stakeholders who are essential to the development of sustainable tourism in the region and who are directly affected by tourism.

—Katariina Lehtonen
Project Manager
City of Rovaniemi

Actions Taken in Rovaniemi to Better Acknowledge Local Perspectives:

- Tourism-themed idea cafes, addressing, among other topics, the side effects of tourism and ways to resolve them.
- Resident Survey , the results of which will be used in the development of a new tourism strategy.
- Series of dialogue events focused on the impacts of tourism on the local community.
- Shared guidelines for the use of recreational areas, aimed at reducing tourism-related disturbances in common spaces.
- Establishment of a tourism development working group that brings together key stakeholders and seeks to institutionalize sustainable tourism operating models.

PHOTO **FALKE SPORTS / ROVANIEMI**

Nature positiveness as an opportunity

Tourism can contribute to biodiversity loss by reducing and degrading habitats and species diversity. It directly impacts biodiversity through land use, for example, when natural areas are designated for construction. Increasing amounts of waste, noise, and light place additional strain on the natural environment. Indirect effects arise from transport emissions and energy consumption, which accelerate biodiversity loss through climate change. Poorly planned or oversized nature tourism also has a negative impact on biodiversity. Reducing harm and enhancing benefits requires comprehensive, holistic planning.[23]

Nature positiveness means strengthening biodiversity instead of weakening it. Thus, human activity aims to promote the well-being and vitality of nature.[24] The World Travel and Tourism Council (WTTC) and the UN Tourism (formerly UNWTO) are working together to make tourism nature positive by 2030[25]. Promoting nature positivity in the tourism industry is not only an act of nature, but also an economic necessity: According to the World Economic Forum, more than half of the world's economy is either quite or very dependent on nature.[26]

The STF programme aims to help tourism operators become aware of the importance of biodiversity and identify the disadvantages of their own activities for biodiversity. With the support of the programme, tourism stakeholders can seek solutions to avoid clashes between tourism and nature, as well as between tourism and local communities, through nature-positive planning and actions. Monitoring the state of the environment with clear indicators helps to address the problem areas. The Sustainable Tourism Indicator System measures the percentage of tourism companies in the STF programme actively supporting the protection, conservation and management of local biodiversity (41% in 2024)[27].

Nature-positive tourism promotes the well-being and vitality of nature.

[23] Visit Finland 2024. STF Guide, 8
[24] Adolfsson 2024
[25] WTTC et al., 2024
[26] Sitra 2021
[27] STF-indicator D.7.1 STF statistics

Tourism operators can strive for nature positivity by creating biodiversity handprints—positive actions for nature that are often local and benefit the surrounding environment. These actions can be small and highly tangible, such as installing birdhouses in yard trees, or more far-reaching in impact, such as developing a biodiversity plan or providing staff training. Direct actions, like removing invasive species or managing outdoor areas in a more nature-friendly way, are easy to implement and have immediate effects; they enable a swift start in efforts to promote biodiversity.

More strategic measures may initially be slower and less visible, but over time they can yield greater benefits for biodiversity while also enhancing the destination's appeal. These actions and the resulting biodiversity handprint are visible at the destination and contribute to its ecological value. Nature positiveness can also be embedded in a company's core operations—meaning that tourism flows are actively used to improve the state of nature.[28]

> **"Travel & Tourism has a key role to play in protecting and conserving nature. Our sector's reliance on nature, coupled with our expertise in creating inspiring and memorable experiences, means we are ideally placed to be "Guardians of Nature."[29]**

Conservation of an Individual Species: Nesting of Eiders on a Lighthouse Island

BENGTSKÄR OY

On the Bengtskär lighthouse islet in the Archipelago Sea, nature and tourism benefit one another. Bengtskär Oy serves as an example of how tourism can generate nature-positive impacts.

The common eider is a highly endangered sea duck species in Finland. One reason for its decline is the increased adult mortality of nesting females. Each spring, many female eiders gather to nest on the small Bengtskär islet, where the presence of tourism staff and visitors at the lighthouse helps protect them from white-tailed sea eagle predation. In 2024, over 500 female eiders nested on the few-hectare rocky islet. The tourism entrepreneur contributes to their protection by waking up early each morning to move around the yard area, helping to keep sea eagles away even at dawn.

Visitors to the island are informed in advance about the eiders and instructed not to disturb them. Additional protection is provided by marking nests and planting shrubs to shelter the birds and their nests. For years, the entrepreneur has also organized popular springtime eider tours to the island in cooperation with Wilson Charter Oy, helping to extend the tourism season into its otherwise quiet early phase.

[28] STF Guide, 8
[29] WTTC

PHOTO **JUHO KUVA**

2 Climate Action Plan

Tourism's greenhouse gas emissions account for just under a tenth (8.8%) of the world's total emissions. Over the last decade, tourism emissions have grown twice as much as total emissions, by an average of 3.5% per year.[30] Although the tourism industry has woken up to its significant emission impacts, the opportunities for genuinely low-carbon tourism are limited so far and there is plenty of development work to be done.

THE CLIMATE ACTION PLAN IMPLEMENTS THE CLIMATE DECLARATION OF THE TOURISM INDUSTRY

Visit Finland has recorded its own climate change mitigation targets and measures in the Climate Action Plan (Climate Action Plan, CAP) published in 2023. In 2024, an updated Climate Action Roadmap was published, broadening the perspective to encompass key objectives affecting the entire sector, along with the measures needed to achieve them—paving the way for Finland's travel industry toward low-carbon operations and a sustainable future.

In the Climate Action Plan, Visit Finland sets targets and measures to support the global goal of halving emissions by 2030 and carbon neutrality by 2050 at the latest.

The Climate Action Plan implements the UNWTO's Glasgow Declaration (Glasgow Declaration on Climate Action in Tourism), which Visit Finland has signed. At the same time, the plan supports the Paris Agreement and the tourism initiative launched by the UNWTO and the COP29 presidency in Azerbaijan (Baku Declaration on Enhanced Climate Action in Tourism), to which Finland has committed.

ORGANIZATIONS CAN ALSO COMMIT TO THE GLASGOW DECLARATION

By committing to the Glasgow Declaration, organisations, such as companies or municipalities, emerge as pioneers of climate resilient tourism and open up opportunities for international cooperation. Already 89 tourism organisations in Finland have committed to the goals of the climate declaration. Organisations involved in the STF programme can easily commit to the declaration, as the STF tools enable smooth preparation of the climate action plan and annual reporting. Visit Finland coordinates the Glasgow Declaration collaboration group, which meets regularly to solve common challenges and share best practices.

[30] Sun et al., 2024

PHOTO **FALKE SPORTS / ROVANIEMI**

CLIMATE ACTIONS ARE MONITORED AS PART OF SUSTAINABLE TOURISM REPORTING

The first Climate Action Plan, prepared in 2023, includes 20 objectives that were refined and progress was reported in the 2024 Roadmap for Climate Action. Climate action plans from previous years provide a broad overview of the climate action within Finnish travel industry, and the impacts of climate change on the sector in Finland.

In accordance with the Climate Action Plan, the tourism sector is progressing along five different pathways towards carbon neutrality. In addition to the five common paths, this report presents a new path towards adaptation to climate change. For each pathway, core indicators have been defined from the Sustainable Tourism Indicator System, forming a general overview of progress toward the objectives.

In addition, the Climate Action Plan includes annual focus areas, which in 2024 delve into two timely themes: low-carbon mobility and climate change adaptation.

A Glasgow Declaration collaboration group, coordinated by Visit Finland, is active in Finland.

From now on, the progress of the Climate Action Plan will be reported as part of the State of Sustainable Tourism report, enhancing both the accessibility of information and the holistic assessment of sustainable tourism.

5+1 pathways towards carbon neutrality

In line with the objectives of the Glasgow Declaration, the Climate Action Plan includes five pathways, which guide to halving emissions by 2030 and carbon neutrality by 2050 at the latest.

Each pathway is guided by climate objectives—twenty in total—which are made concrete through 163 actions. These actions relate to four focus areas: strengthening Visit Finland's organizational capabilities, developing national frameworks and guidelines for low-carbon tourism, fostering international cooperation, and supporting the tourism sector as a whole.

In addition, the recently published Climate Action Plan framework by the European Travel Commission (ETC), intended for national tourism organizations, introduces a new perspective: climate change adaptation. This theme also forms a dedicated pathway in this report.

PATHWAY	OBJECTIVES
1. The **Measuring** pathway focuses on standardizing the measurement of emissions in the tourism sector as well as developing sustainable tourism indicators. Development work on emissions calculation is carried out by Visit Finland at three levels: the traveller, the company, and the destination. Hiilikuri, the CO2 calculator developed for tourism companies is available for all companies in the STF programme. The development of the indicator system, on the other hand, aims at identifying the boundaries, scope and opportunities of sustainable tourism. In addition, Visit Finland has invested in training to implement emission calculators and in international cooperation to scale best practices. The emission indicators developed for the Matkailijamittari Border Survey provide valuable insights into the development of emissions within the tourism sector.	**1.** Measure and report GHG emissions **2.** Develop and maintain Finnish Sustainable Tourism indicator system
2. **Decarbonisation** pathway is putting efforts to reduce emissions on the main emission sources in the tourism industry, such as mobility, accommodation, food and events. Visit Finland has prepared guidelines for a responsible event, produced a 'Sustainable & Safe Tourism Destination' coaching series for the DMOs and updated a guide to sustainable food tourism. In addition, Visit Finland supports low-carbon mobility through industry-wide roadmap work. **Read more** about low-carbon mobility on page 34.	**3.** Promote low-carbon mobility **4.** Promote sustainable accommodation **5.** Promote sustainable events **6.** Promote sustainable destinations **7.** Support domestic and inter-regional tourism **8.** Promote low-carbon diets
3. **Regenerative** tourism refers not only to the positive impact that tourism has on the destination, but also to a deeper systemic change; healthier ecosystems. As stated in the Glasgow Declaration, the principles of regenerative tourism "help tourists and local communities to find a better balance with nature". To promote climate action, Visit Finland has launched the Tourism & Biodiversity toolkit as part of the STF programme. The goals of the regenerative approach at Visit Finland are related, among other things, to promoting nature-based solutions, increasing understanding of the importance of diverse nature, and recognising connection between climate, nature and wellbeing. **See also** nature-positive tourism on page 25.	**9.** Integrate climate mitigation into business strategies **10.** Develop and publish long-term climate plan for Finnish tourism industry **11.** Prioritise regenerative tourism approach to tourism **13.** Ensure travel industry supports connection between climate, biodiversity and wellbeing **14.** Progressively promote nature-based solutions in spite of offsetting

PATHWAY	OBJECTIVES
4. Collaborate pathway aims to develop collaboration that supports sustainable tourism at various levels. The collaboration-related objectives pertain both to cooperation between Visit Finland and tourism businesses, as well as to collaboration among companies within destinations. This pathway aims to encourage and activate both actors already committed to the Glasgow Declaration and those tourism businesses still in the early stages of their sustainability efforts. In addition, Visit Finland has invested in international cooperation on climate-related themes.	**15.** Coordinate collaborative working between Finnish Glasgow signatories **16.** Ensure community engagement in Visit Finland's Climate Action Plan **17.** Engage with businesses other than frontrunners **18.** Promote sustainable tourism withing destinations
5. Finance pathway is aimed at resourcing the promotion of sustainable tourism, in particular by securing funding for the STF programme. In addition, the aim is to safeguard the business conditions of the Finnish tourism sector within the framework of low-carbon tourism.	**19.** Ensure sufficient funding for Visit Finland's Sustainable Travel Finland programme **20.** Ensure Finnish tourism prospers through low-carbon development
+1 Adaptation to climate change was originally taken into account on regenerative pathway. Adaptation to changing and increasingly extreme weather conditions and changes in the operating environment is increasing in importance year by year, and as tourism is one of the sectors exposed to climate risks, adaptation will be raised to its own pathway in this year's climate action plan. **Read more** about tourism industry adaptation on page 36.	**12.** Integrate climate change adaptation considerations into business strategies

1. Measure

46 %

of STFs measure their carbon footprint (662 pcs).

2023: 52 % (602 pcs)

CHANGE -6 % PPS

2. Decarbonise

1,2 €/kg

Carbon efficiency of foreign visitors.*

2023: 1,2 kg

3. Collaborate

89

Tourism industry operators committed to the Glasgow Declaration.

2023: 67

CHANGE +22

4. Regenerate

41 %

of STF businesses actively support biodiversity.

2023: 42 %

CHANGE -1 % PPS

5. Finance

1,3M €

STF Programme funding.

2023: 1,1M €

CHANGE +0,2M €

6. Adapt

164

Ranking in an index indicating the disaster risk from extreme natural events and negative impacts of climate change.**

2023: 165

CHANGE -1 PLACE

Climate Action Plan 2024

* Carbon efficiency means the ratio of the euro spent by the tourist to the carbon dioxide emissions generated.

** Index indicates the disaster risk from extreme natural events and negative climate change impacts for **193** countries in the world. It is calculated per country as the geometric mean of exposure and vulnerability. Finland's risk index is **1.54** and the ranking is **164/193**. The lower the score and the greater the rank, the lower the risk.

Sources: Visit Finland, Matkailijamittari Border Survey, The World Risk Report 2024

Low-carbon mobility

Transport is the largest single source of emissions in the tourism industry, as transport accounts for as much as 75% of tourism emissions and air travel alone accounts for 40%.[31] Sustainability work in the tourism industry has traditionally focused on low-carbon mobility within the destination. As air travel continues to grow, industry stakeholders must increasingly consider not only local transportation at the destination, but also opportunities to influence the emissions from air travel.

Air travel is estimated to account for 2.5% of global climate emissions, and around 4% in the EU.[32] This may sound insignificant, but air travel accounts for a substantial portion of an individual consumer's carbon budget. For every dollar generated by tourism, more than a kilogram of greenhouse gas emissions is generated globally, of which less than a third comes from aviation.[33] Leisure flying accounts for an average of 7.4% of the Finnish carbon footprint[34], although it should be noted that many Finns do not fly at all, while others fly frequently and far. A single return flight in Europe accounts for almost a tenth of the annual carbon footprint of an average Finn. Similarly, long-haul flights account for up to 40%.[35] For example, a return flight between Hong Kong and Helsinki produces significantly more emissions than the average annual emissions from housing or food consumption of a Finnish person.[36]

Thus, the traveller's choice of mode of transport has a major impact on their own carbon footprint and the climate impact of the trip. The emissions from sea travel depend on the route and the vessel; in some cases, arriving by sea is less carbon-intensive than flying, but in other cases, the emissions from sea and air travel are comparable—or the sea journey may even produce slightly more. The train has the lowest emissions of all transport modes. Although Finland is not yet accessible by train, it is worthwhile to complete part of the journey by train. For example, a traveller departing from Central Europe generates about half the emissions when using a train-ferry combination compared to flying.[37]

The obstacles to land-based travel to Finland are evident: our geographical location and the lack of an international rail connection are disad-

A round-trip flight from Hong Kong to Helsinki generates more emissions than a year of living.

31 UNWTO 2019
32 Statista 2024; Ritchie 2024; European commission 2024a
33 Sun et al., 2024
34 Salo et al., 2023
35 Sitra 2018; Open CO2net
36 Sitra 2018
37 Visit Finland 2024g

vantageous from the perspective of low-emission train travel. In 2024, Visit Finland published a report[38] on the potential of alternative and low-carbon modes of transport, examining Finland's accessibility by land and sea from key European markets. On average, a land-based journey to Finland takes seven times longer than a flight. Typically, flying to Finland is over 30 hours faster than traveling by land.

PHOTO **VISIT FINLAND**

On the other hand, Finland's remote location also affects the emissions from air travel: the emission intensity of flying to Finland is approximately 122 kg CO_2e per traveler, which is significantly higher than the EU average and that of neighbouring countries[39]. This can be partly explained by Finland's reliance on long-haul tourism markets and the geographical challenges of land-based travel described above.

Air travel emissions are influenced not only by the aviation industry's progress in developing low-carbon fuels but also by the overall volume of air travel. One way to reduce the number of flights is to encourage longer stays, so that with the same number of flights, the number of travelers increases in proportion to overnight stays. Currently, the median stay of international leisure tourists in Finland is only three days[40]. The idea is simple: with longer stays, tourism capacity is filled with fewer flights, and emissions decrease as the total number of trips declines. The nature of the trip also affects the length of stay—for example, nature-based trips tend to be longer than cultural ones.

Visit Finland encourages longer stays through country branding, product development, and by supporting cooperation between tourism regions. In addition, Visit Finland raises awareness about the emissions from air travel and encourages tourism businesses to do the same.

[38] Visit Finland 2024g
[39] EU Tourism Dashboard
[40] Matkailijamittari

Adapting to a changing climate

The tourism industry has made long-term efforts to reduce emissions. A more recent perspective in the sector's climate work is climate change adaptation, which refers to strengthening the climate resilience of tourism operators. Finland's northern climate is warming two to four times faster than the global average—the farther north, the faster the warming.[41][42] The effects of climate change are already visible, and from a climate risk perspective, tourism is one of the vulnerable sectors. Therefore, alongside emission reductions, it is essential for the tourism industry to recognize the necessity of adaptation and identify key strategies.[43]

According to estimates, the impacts of climate change on Finnish tourism are twofold. On one hand, reduced snow cover and delayed onset of winter conditions weaken the prerequisites for winter tourism, particularly in ski resorts in Southern and Central Finland. In the north, snowfall may even increase, but a shorter snow season affects especially Christmas tourism.[44] On the other hand—ironically—Finland's cool climate may become a competitive advantage as Southern Europe experiences more frequent heatwaves and droughts.

In addition to the direct effects of climate change, Visit Finland has identified indirect impacts on the tourism sector.[45] These include, for example, rising costs of maintaining tourism infrastructure, such as snowmaking in winter and cooling buildings in summer. Climate change also increases safety and health risks for travelers, as water quality in swimming areas may deteriorate, tick-borne diseases may become more common, and the likelihood of storm damage may rise.

Visit Finland has recognized adaptation as part of its Climate Action Plan. Adaptation is being increasingly integrated into guidance, training, and communication targeted at businesses, as well as into international cooperation

41 Mikkonen ym. 2015
42 Rantanen ym. 2022
43 ETC 2025
44 Gregow ym. 2021
45 Visit Finland 2023b

PHOTO **ANSSI TIUSANEN**

3 Sustainability of the Travel Sector in Finland

International comparison

The EU Dashboard is a tourism information tool that provides information on indicators relevant to the European tourism ecosystem[46]. Its purpose is to promote and monitor the digital and green transition of tourism, as well as socio-economic sustainability. The content of the data tool is collected from reliable sources at the most accurate regional and thematic level, although there are some country-specific differences in data sources and statistics production. The latest EU Dashboard data is from 2023, while the rest of this State of Sustainable Tourism report refers to 2024 statistics and results. However, the EU Dashboard makes it possible to compare internationally and look at trends in the big picture. This chapter uses data from the EU Dashboard for Finland and the other Nordic countries.

The EU Dasboard is divided into three pillars: green, digital and socio-economic policy pillars. The Green Pillar contains variables describing the sustainable tourism development from an environmental perspective. Of the Green Pillar variables, Finland performs poorly compared to the other Nordic countries and the EU average, especially in terms of the emission intensity of air travel. In 2023, Finland's emission intensity per passenger was about 123 kilograms of carbon dioxide per passenger, which was the highest of all the Nordic countries. However, the emission intensity in Finland has decreased over the past two years, as in the other Nordic countries. In Finland, the dependence on distant countries of origin (10%) is higher than the values of Sweden, Norway and Denmark, but clearly lower than the value of Iceland and slightly lower than the EU average. High dependence on distant countries of origin leads to a higher carbon footprint due to long flight distances.

The socio-economic pillar includes indicators that reflect progress toward more socially sustainable tourism. One of the key indicators in this pillar is tourism seasonality, which illustrates the temporal concentration of tourism activity throughout the year. High seasonality can reveal imbalances in workload and economic activity, as well as vulnerability to fluctuations in demand. Low values indicate more evenly distributed tourism demand across the year, i.e., low seasonality. High seasonality can weaken the socio-economic sustainability of tourism. In 2023, tourism seasonality in Finland was 34%, the lowest among all Nordic countries. However, it is important to note that this figure represents a national average, which may partly give a misleading impression. Finland has several tourism regions with strong seasonal peaks in different parts of the year. For example, Lapland's strong winter season lowers the national average, even though a significant share of tourism in other parts of Finland is concentrated in the summer.

[46] EU Tourism Dashboard: https://tourism-dashboard.ec.europa.eu

Dependence on the top three source markets is another indicator, reflecting a region's vulnerability to risks related to international travel restrictions and other demand fluctuations. Low values indicate less dependence on the top three markets, suggesting high market diversity and potentially lower exposure to demand shocks. In 2023, Finland's dependence on its top three source markets was lower than in other Nordic countries and the EU average.

The indicators of the digital pillar reflect progress toward more sustainable tourism from the perspective of the digital transition. Digitalization supports the economic sustainability of tourism businesses by improving their profitability and competitiveness. The e-commerce sales indicator represents the share of tourism ecosystem businesses that engage in online sales. Higher values can be interpreted as signs of a more advanced digital transformation. In 2023, e-commerce sales were relatively consistent across the Nordic countries and clearly above the EU average in all of them. In Finland, nearly half (48.5%) of businesses engaged in e-commerce sales, which was lower than in Denmark and Sweden, but higher than in Norway (no data available for Iceland).

PHOTO **ANTS VAHTER**

	Tourism Seasonality (%)	Dependence on TOP 3 Countries of Origins (%)	Dependence on Distant Origins (%)	Air Travel Emission Intensity (kg, CO2/passanger)
Finland	**34 %**	**8 %**	**10 %**	**122**
Sweden	44 %	12 %	4 %	74
Norway	44 %	13 %	7 %	65
Denmark	44 %	18 %	5 %	76
Iceland	43 %	44 %	60 %	122
EU 27	**42 %**	**46 %**	**12 %**	**91**

Temporal concentration of tourism activity during the year, potentially revealing unbalanced pressure and economic activity, as well as vulnerability to demand shocks. A high seasonality is potentially detrimental for the socio-economic resilience of tourism. Low indicator values are preferred, as they indicate lower temporal concentration of tourism demand during the year, representing low seasonality.

Dependence of a destination on its 3 most significant international source markets for tourism. Reveals exposure to risks related to specific international travel restrictions and other demand shocks. Lower values indicate a lower dependence on the three top countries of origin and, therefore, signal high market diversification and thus a potentially lower susceptibility to shocks.

Dependence of a country's tourism on distant international markets. Within the European continent, the countries of origin are considered distant if they are at a distance of 2000 km or more from the destination. Origins outside the European continent are always assumed distant. A high indicator value implies a potentially higher environmental footprint due to long-distance travelling.

Estimate of the average amount of CO2 emitted per air passenger per reporting country. Lower values indicate lower emissions per air passenger. Higher country values are usually associated with long-haul flights.

TRAVEL SEASONALITY, DEPENDANCY AND EMISSIONS

Nordic Comparison

Insights into sustainable tourism through STF Data in 2024

FIGURES FOR STF COMPANIES AND FINLAND

At the end of 2024, 1,436 Finnish tourism companies had joined the *Sustainable Travel Finland* programme, managed by Visit Finland and developed in cooperation with the industry. The number of participants in the programme increased by more than a fifth (22%) from 2023 and the target set for the year (1,250 companies) was well exceeded. The companies participating in the programme identified the most important benefits as increased visibility and reputation as a sustainable tourism operator, the added value of achieving the STF label, and the marketing support and additional exposure provided through Visit Finland[47].

A company can apply for the STF label when it has successfully completed the entire STF development path. At the end of 2024, already 500 companies had the STF label. The number increased by almost a third (29%) from 2023, reaching its annual target of 480 companies. According to the programme's impact assessment, companies gained the most added value from the comprehensive understanding of sustainability they acquired through the programme.[47]

Destinations can also apply for the STF label. A destination must go through the full STF programme development path, and it can only receive the label once at least 51% of the tourism businesses in its network have obtained the STF label, or if the destination holds a GSTC-accredited destination-level certification along with an action plan to guide local businesses through the STF path toward the label. In this way, the programme promotes strong collaboration between the private and public sectors to advance sustainability.

There are currently 70 destinations participating in the programme. In 2024, the number of STF-labelled destinations increased significantly—from five in 2023 to eleven by the end of 2024. The new STF destinations in 2024 are Espoo, Salla, Oulu, Turku Archipelago, Vaasa, and Vuokatti. The greatest benefit reported by destinations in 2024 was the commitment of the local business network to sustainable tourism and the adoption of a continuous improvement model for responsible tourism[47]. The destinations that received the STF label before 2024 are Tahko, Jyväskylä Region, Kristinestad, Puumala, and Savonlinna.

The STF programme gathers extensive information from companies regarding the state of sustainable tourism and its developmental

[47] Visit Finland 2024 STF impact assessment

PHOTO **EWELINA DOBOSZ**

outlook. As part of the STF programme, companies and destinations annually complete an indicator monitoring form. During 2024, 495 companies filled in the indicator form. Of all the destinies on the STF path, more than a quarter (27%) participated in the submission of information related to the destinations. Destinations organised more training related to sustainable tourism in 2024 than in 2023.

On the DataHub maintained by Visit Finland, the share of travel products of companies that received the STF label was 18% in 2024, which is the same as in 2023.

ECONOMIC VALUE

According to the travel balance produced by Statistics Finland, the value of tourism exports in 2024 was €5.5 billion, including passenger transport. This accounted for 14 percent of Finland's service exports. In 2023, tourism service exports were nearly the same in euro terms (€5.4 billion), but their share of service exports was 16 percent. This indicates that tourism has grown more slowly than other service exports.

In 2024, the number of registered overnight stays in Finland saw a slight decline for the first time since the COVID-19 pandemic. A total of 22.7 million overnight stays were recorded in registered accommodation establishments, representing a one percent decrease compared to 2023. This slight drop in total overnight stays is explained by a five percent decrease in domestic overnight stays. In contrast, the number of overnight stays by international visitors increased by 11 percent year-on-year.

Compared to 2019, the total number of overnight stays in 2024 was two percent lower. However, domestic overnight stays were already two percent higher than in 2019, while international overnight stays remained ten percent below pre-pandemic levels. The situation varies significantly by country of origin. While travel from EU countries and the United States has clearly surpassed 2019 levels, arrivals from Asian countries are still nearly one-third (29%) below the peak year of 2019. The growth in tourism is now driven by international visitors, as domestic demand declines.[48]

There were also regional differences in 2024. Among the greater regions, the Helsinki

[48] Rudolf statistical database

region was the only one where the number of registered overnight stays increased for both domestic and international visitors (by 8%). Winter tourism in Lapland continued to grow among international travellers, with a 14% increase compared to the previous year. However, the total number of overnight stays in Lapland declined by 2%, explained by a significant 16% drop in domestic overnight stays from 2023. The greater regions of Lakeland (-6%) and the Coast & Archipelago (-4%) also lost domestic travellers. The Coast & Archipelago region, however, saw a modest increase of 4.8% in international overnight stays. The slight decline in domestic tourism is partly attributed to inflation-driven price increases and the post-pandemic rise in Finns traveling abroad.

In 2024, Finland's accommodation capacity—including hotel rooms, cottages, and other lodging facilities—totalled 163,700 beds. The occupancy rate was 50%. The average length of stay in accommodation establishments was 1.8 nights, slightly down from 1.9 in 2023[49]. Among companies participating in the STF programme, the average stay was slightly longer than the national average. In STF companies, the average length of stay was 2.2 nights, close to the 2023 figure of 2.3 nights.[50]

The share of year-round tourism businesses has decreased.

Extending the length of stay and reducing seasonal fluctuations are economically important goals for tourism businesses. In 2024, seasonality increased for both domestic and international travellers. Seasonality is measured using the Gini coefficient. The average stay for domestic travellers decreased to 1.7 nights in 2024, while international travellers maintained their average stay at 2.2 nights.

The STF programme's economic sustainability indicators also collected data in 2024 on the year-round operation and number of open months of participating businesses. Both the average number of open months and the share of year-round tourism businesses in the STF programme declined by a few percentage points from 2023 to 2024.[51]

SOCIAL IMPACT

The social sustainability of tourism is significantly affected by the number of visitors in relation to the number of locals and the carrying capacity of the destination, as well as job satisfaction in the tourism industry. The number of visitors in the destinations participating in

[49] Rudolf statistical database
[50] STF-indicator B.2.1a, STF statistics
[51] STF indicator B.1.11 and B.1.13 STF statistics

the STF programme, relative to the area (0.18) or per 100 inhabitants (1.11), has not changed significantly since 2023.

To promote social responsibility, Visit Finland updated its inclusive tourism toolkit in 2024. The revised materials take into account not only travelers but also work communities, as well as the diversity of markets and ideas. Inclusivity is embedded as a guiding principle throughout the company's operations and mindset.[52]

In 2024, several new social sustainability indicators related to the wellbeing of tourism sector employees were introduced into the Sustainable Tourism Indicator system. These new indicators include the proportion of tourism workers who find their work meaningful (78%)[53], the proportion of employees who perceive their work community as fair (73%)[54], and the appreciation of employee diversity (76%)[55]. The aim of these new indicators is to provide a more comprehensive picture of the state of social sustainability in the tourism sector.

For some of the indicators introduced in the STF programme in 2024, comparative data is already available from PAM's annual member surveys. Among tourism sector employees, the proportion of those satisfied with the sense of belonging in their work community showed a slight decline (-7%)[56]. The share of employees who felt their skills were well utilized and who received sufficient training also decreased (-18%)[57]. In addition, opportunities for career advancement were perceived to be lower than before, with a 17% drop according to the 2024 results[58].

New indicators include, for example, those who find their work meaningful and diversity.

PHOTO **VISIT FINLAND**

[52] Visit Finland (2024h) Guide to Inclusive Tourism
[53] STF indicator C.1.6.1 PAM member survey
[54] STF indicator C.1.6.2b PAM member survey
[55] STF indicator C.1.6.7 PAM member survey
[56] STF indicator C.1.6.2a PAM member survey
[57] STF indicator C.1.6.3 PAM member survey
[58] STF indicator C.1.6.4 PAM member survey

Half of tourism workers are still considering changing careers[59]. According to the 2024 national member survey by the Service Union United (PAM), financial concerns have increased among those working in the service sector. Thirty-eight percent of respondents reported that their financial situation had worsened over the past 12 months. Government budget cuts have particularly affected part-time workers, who are common in the tourism sector. Among part-time employees in the hospitality, restaurant, and leisure (Marava) sector, as many as 41% reported a decline in their livelihood over the past year.[60]

For work to feel meaningful, it is important that employees feel capable of performing their tasks well and have opportunities to grow in their roles[61]. Since the COVID-19 pandemic, the shortage of skilled workers in the sector has intensified, making it increasingly important for companies to retain talent. Efforts to improve the attractiveness of the sector have been ongoing for years, but the figures above show that there is still work to be done. Improving working conditions is key to advancing socially sustainable tourism.

Companies participating in the STF programme have made significant progress in serving diverse customer groups: the share of businesses offering services for customers with reduced mobility rose to 40%[62] (from 11% in 2023), and the share of businesses offering services for LGBTQ+ customers increased to 58% (from 33% in 2023)[63].

SAFETY

Travel safety is a key part of the travel experience. It begins already at the planning stage and is shaped by many factors during the visit. Safety encompasses environmental, health, and social aspects, all of which can be challenged by climate change, pandemics, and the political climate. Climate change brings increased instability and extreme weather events. A sense of safety is important for travelers, as it enables carefree travel and influences destination choice and customer satisfaction.[64]

Tourism businesses are responsible for preventing risks and preparing for potential hazards. Safety is also part of responsible and high-quality tourism and can become a competitive advantage. Maintaining it requires continuous skills development and collaboration with industry professionals. In 2024, Visit Finland published a comprehensive safety toolkit for tourism, designed

[59] STF indicator C.1.6.5 PAM member survey
[60] Service Union United PAM 2025
[61] Angeria, 2023
[62] STF indicator C.4.1a STF statistics and State of Sustainable Tourism 2023
[63] STF indicator C.4.1b STF statistics and State of Sustainable Tourism 2023
[64] STF Guide, 5

to help tourism businesses improve their safety practices. The new material aims to integrate safety more closely into the STF programme by expanding previous health safety content to cover the full spectrum of safety in tourism.[65]

In 2024, new safety-related indicators were introduced into the Sustainable Tourism Indicator system. These indicators are based on international indices that provide a broad view of different aspects of safety.

The Global Peace Index (GPI) annually assesses the peacefulness of 163 independent states and territories, covering 99.7% of the world's population. It includes three themes: ongoing domestic and international conflict, societal safety and security, and militarization. Lower scores (1—5) and lower rankings indicate greater peacefulness. In 2024, Finland ranked 13th with a score of 1.474,

PHOTO **ÄKSYT ÄMMÄT**

improving by two positions (0.01 points) from the previous year. Iceland ranked first, and among the Nordic countries, only Denmark ranked higher than Finland, at 8th place.[66]

The Anholt Nation Brands Index (NBI) measures the global image of over 50 countries annually. It tracks the rise or fall of national reputations across six dimensions. One of these is governance, which includes the peace and security variable, defined as a country's responsible contribution to international peace and security. Finland performed best in this governance dimension, ranking 7th in the peace and security variable—an improvement from 10th place in 2023.[67]

The World Economic Forum's Travel and Tourism Development Index (TTDI) evaluates tourism development across countries. It includes a Safety and Securi-

[65] Visit Finland 2024e
[66] Global Peace Index (GPI)
[67] Anholt Nation Brands Index 2024

KUVA **LAURA VANZO**

ty pillar and a Health and Hygiene pillar. The safety pillar measures the extent to which residents, tourists, and businesses are exposed to safety risks. Higher scores (1—7) indicate better performance. In 2024, Finland ranked 4th with a score of 6.56. Singapore ranked first (6.82), and among the Nordic countries, only Iceland ranked higher than Finland, in 3rd place with 6.59. Finland's score and ranking improved from the previous assessment in 2021, when it ranked 13th with a score of 6.31.[68]

In the Health and Hygiene pillar, which assesses healthcare infrastructure, accessibility, and health safety, Finland ranked 18th in 2024 with a score of 6.05. Austria ranked first with a perfect score of 7. Finland outperformed the other Nor-

[68] WEF Travel & Tourism Development Index 2024

dic countries, with Sweden ranking next at 26th with a score of 5.9. Finland's score and ranking also improved from 2021, when it ranked 26th with a score of 5.8.[69]

From an environmental perspective, safety was assessed using the World Risk Report, which measures countries' exposure to natural disasters and their capacity to cope (see also page 33). The index evaluates disaster risk caused by extreme natural events and the negative effects of climate change in 193 countries. It is calculated as the geometric mean of exposure and vulnerability. Lower scores and higher rankings indicate lower risk. Finland had a very low risk index of 1.54, ranking 164th out of 193. Monaco had the lowest risk index (0.18), and among the Nordic countries, only Denmark ranked higher than Finland, at 182nd with a score of 0.98.[70]

Finland ranks lowest among the Nordic countries in the LGBTQ+ Travel Safety Index

The LGBTQ+ Travel Safety Index ranks countries based on LGBTQ+ friendliness in tourism, considering anti-discrimination laws, violence against trans people, and societal attitudes toward sexual and gender minorities. Finland received the second-highest rating (A-) and ranked 22nd. The top-ranked countries were Canada and Sweden. Finland had the lowest ranking among the Nordic countries. The country lost points particularly due to the lack of legal gender recognition without a medical transition process.[71]

CULTURAL IMPACT

In the STF programme, cultural sustainability is monitored by tracking the number of sites with UNESCO World Heritage status, Intangible Cultural Heritage recognition, number of Council of Europe Cultural Routes, or UNESCO Global Geopark designation. In 2024, the number of such sites in Finland increased impressively by 31[72]. For example, four historical industrial sites in the Pirkanmaa region were added to the European Route of Industrial Heritage (ERIH). These include the Myllysaari and Kauppilanmäki museums in Valkeakoski, as well as the Vapriikki Museum Centre and the Finnish Labour Museum Werstas in Tampere. In total, 16 new Finnish sites joined the ERIH

[69] WEF Travel & Tourism Development Index 2024
[70] World Risk Report 2024
[71] LGBTQ+ Travel Safety Index 2023
[72] STF indicator C.5.2a Finnish Heritage Agency, UNESCO, Council of Europe

KUVA **EPPU WHYBROW / MAGICAL POND**

route in 2024[73]. The route aims to connect Europe's industrial heritage and promote sustainable cultural tourism. Being part of the route enhances the visibility of Finland's industrial heritage sites[74].

In 2024, UNESCO Global Geopark status was granted to the Lake Lappajärvi area in South Ostrobothnia. This marked the fifth member of Finland's UNESCO Global Geopark network, which now spans 32 municipalities across seven regions. A Geopark designation is awarded to a unified geographical area with internationally significant geological sites that also reflect the region's landscape, cultural heritage, geology, and biodiversity.[75]

Food is an essential part of culture and a way to share it with travellers. Culinary experiences create lasting memories and emotional connections. Developing food tourism offerings and promoting culinary travel can significantly support year-round tourism and sustainability in the sector[76]. Finland's food tourism aims to offer travellers a way to explore local strengths, phenomena, culture, traditions, and history through food experiences. In 2024, Finland's Food Tourism Strategy for 2024—2028 was published[77]. Visit Finland also updated its guide to sustainable food tourism. Sustainable food tourism combines environmental responsibility, locality, and cultural heritage.

Culinary tourism contributes to year-round tourism and fosters sustainable growth.

73 Valkeakosken sanomat 2024
74 Finnish Heritage Agency 2024
75 Geoparks Finland network 2024
76 Visit Finland
77 Laamanen, Pöyhönen and Garam, 2024

KUVA HARRI TARVAINEN / VISIT KARELIA

ENVIRONMENTAL IMPACT

2024 was the warmest year in the world's weather observation history. The average temperature was more than 1.5 degrees Celsius above the average for the pre-industrial period. In Finland, 2024 was the fourth warmest in history and again included many extreme weather phenomena. The world was plagued by heat, torrential rains and hurricanes.[78] The environmental impacts of tourism and solutions for mitigating them were extensively addressed in the 2023 State of Sustainable Tourism report[79]. In addition to minimizing negative effects, this report highlights ways in which tourism operators can increase their positive handprint through nature-positive actions and climate action planning pathways.

Next, we will examine the status of companies participating in the *Sustainable Travel Finland* (STF) program in terms of environmental impact indicators in 2024, compared to the baseline year 2023. Following that, we will review data from Matkailijamittari Border Survey regarding the environmental impacts of international visitors. The tourism sector's climate resilience is discussed in more detail in the section Climate Action Plan 2024 (page 27) of the report.

ENERGY CONSUMPTION AND RECYCLING

In 2024, companies participating in the *Sustainable Travel Finland* (STF) program collected an average of five waste fractions in customer areas and six in their own facilities[80]. Finnish waste legislation requires companies to recycle nearly all waste types, including biowaste (excluding garden or park waste), plastic packaging, paper and cardboard packaging, glass packaging, and small metal waste.[81] Nearly all STF companies have

78 Finnish Meteorological Institute 2024
79 Visit Finland 2024a
80 STF indicator D.3.4 STF statistics
81 Ministry of the Environment

trained their staff in waste management, sorting, and recycling, and have organized waste sorting for the fractions for which collection and transport services are available in their area.[82]

A waste management plan is in place in 86% of the companies, and 77% have enabled waste sorting for their customers. The amount of waste is significantly influenced by how well companies can reduce food waste, among other factors. On average, STF companies implement three actions that promote sustainable food choices. About two-thirds (63%) of the companies use sustainably produced and organic food products in their services.[83]

Almost all STF companies (97%) have taken actions to reduce energy consumption. The most common measures include optimizing indoor temperatures, systematically monitoring energy use, and using LED or smart lighting.[84] The share of renewable energy in STF companies' annual energy consumption increased from 69% in 2023 to 84% in 2024[85]. This growth aligns with Finland's broader transition away from fossil fuels and the increasing adoption of zero-emission energy technologies. The least implemented actions include utilizing waste heat, joining the energy efficiency agreement for the tourism and hospitality sector, and conducting energy audits—likely due to the greater resources and expertise these actions require.

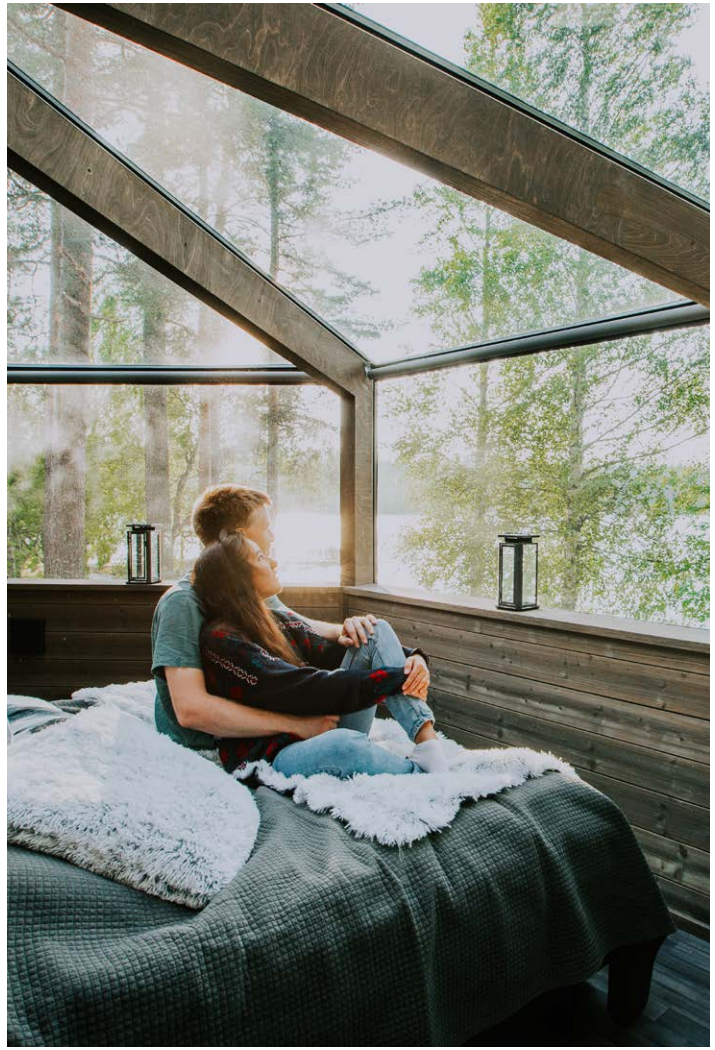


PHOTO **JULIA KIVELÄ**

Typical water-saving measures among STF companies include regularly checking fixtures for leaks, monitoring water use, optimizing hot water temperatures, using water-efficient fixtures, and actively encouraging customers to reduce water consumption. The share of companies implementing

82 STF indicator D.2.1
83 STF indicator D.7.1.1 STF statistics
84 STF indicator D.6.2 STF statistics
85 STF indicator D.6.3 STF statistics

water-saving measures rose to 92% in 2024, up from 2023.[86]

NATURE AND CLIMATE

The share of STF companies measuring their carbon footprint decreased by about six percentage points from 2023, with around half (46%) doing so in 2024[87]. The number of climate mitigation actions also declined slightly. However, all STF companies are engaged in some form of climate action.[88]

Actions that promote biodiversity tend to be more challenging for companies. Around 40% of STF companies actively support the protection, conservation, and management of local biodiversity. These efforts may include creating diverse habitats for flora and fauna, controlling invasive species, and training staff on biodiversity protection and management. These were also the most common biodiversity-related actions taken by STF companies. Due to the complexity and resource demands, such actions may be perceived as more difficult to implement. However, the rise of nature-positive tourism may help turn these challenges into business opportunities.

The share of STF companies operating in national parks or other protected areas managed by Parks & Wildlife Finland (Metsähallitus) that have a sustainable tourism agreement with Metsähallitus decreased from 92% in 2023 to 85% in 2024.[89]

40 % of STF companies support biodiversity.

PHOTO JULIA KIVELÄ

[86] STF indicator D.6.3
[87] STF indicator D.2.1.1 STF statistics
[88] STF indicator D.2.1 STF statistics
[89] STF indicator D.7.1.2 STF statistics

MOBILITY

Promoting sustainable mobility can significantly reduce emissions caused by tourism. Companies have various means to influence the accessibility of their destinations and encourage customers to choose low-emission modes of transport. Approximately 80% of STF companies have encouraged their customers to use public transportation and the lowest-emission travel options both when arriving at and moving within the destination. Around 60% of companies have developed sustainable mobility guidelines for their own transport and logistics needs, as well as for employee commuting.

Companies can attract visitors using low-emission vehicles by offering electric vehicle charging stations. About half of STF companies have charging stations either on their own premises or in facilities they use. Additionally, 30% of companies use vehicles that fall within energy classes A—C or are powered by electricity or biofuels.[90]

In addition to the mobility-related indicators collected through the STF program, this report also discusses emissions from travel and opportunities for reduction in the section on the Climate Action Plan (page 27). The following section examines inbound travel as well as travel within Finland based on border survey data reported in the Matkailijamittari.

Finland is geographically challenging to reach, especially by land. In early 2024, Visit Finland commissioned a study on alternative and low-carbon accessibility to Finland. The study explored alternatives to flying from cities in Western Europe, Nordic capitals, and via the Baltic countries.[91] According to the Matkailijamittari, 61% of trips to Finland were made by air and 39% by sea[92]. Since the Matkailijamittari is based on surveys conducted only at ports and airports, there is no data available on train or car travel to Finland.

The average daily climate impact (CO_2e kg) of international visitors in 2024 was 63 kg CO_2, a slight increase from 61 kg CO_2 in 2023[93]. As full-year data for 2023 is not available, the comparison uses a rolling 12-month period (03/23—02/24). However, the total emissions from international visitors slightly decreased in 2024, amounting to 3,081,800 tonnes of CO_2.[94]

Efforts are also being made to improve sustainable modes of travel and accessibility within Finland. According to VR (the Finnish railway company), train travel reached record popularity in 2024. A total of 15.3 million long-distance train journeys were made, which is 1.3% more than in 2023. In December alone, travel in-

61 % of trips to Finland are made by plane.

90 STF indicator D.2.1
91 Visit Finland 2024c
92 STF indicator D.1.1 Matkailijamittari Bordey Survey
93 STF indicator D.1.4 Matkailijamittari
94 Matkailijamittari Border Survey

PHOTO **VISIT FINLAND**

creased by 3.7% compared to the same month in 2023.[95] At the end of 2024, Visit Finland launched ten new travel routes designed with low-carbon transport in mind. Train-based circular tours are an excellent example of how travellers can be guided to lesser-known destinations and how stays can be extended through multi-stop itineraries.[96] Increasing awareness of these routes is one of Visit Finland's goals for 2025.

The popularity of train travel has not only increased in Finland. According to the EU-Rail, cross-border rail traffic in Europe grew by 7% in 2024 compared to 2023[97]. The European Union is committed to developing rail travel, with goals including the removal of barriers, improved interoperability, modernization of passenger transport infrastructure, and enhanced service quality across all EU countries.[98]

[95] VR 2025
[96] Visit Finland 2024d
[97] New York Times 2025
[98] European Commission 2024b

PHOTO **HARRI TARVAINEN**

4 Conclusions

TOURISM GROWTH AND SEASONALITY

Tourism growth in 2024 was driven by international visitors. Domestic tourism, which had increased after the COVID-19 pandemic, declined for the first time. Travel from EU countries and the United States has clearly surpassed 2019 levels, while travel from Asian countries remains nearly one-third below the peak year of 2019. As domestic tourism slows and reaches a saturation point, maintaining the vitality and competitiveness of the tourism sector requires investments in the development and marketing of international tourism.

In 2024, seasonality in Finnish tourism increased and remains stronger than before the pandemic. Tourism grew more rapidly during the winter months than in the summer, with Lapland's winter season performing exceptionally well. However, the growing disparity between regions and seasons is a concerning trend. The Helsinki metropolitan area and Lapland remain the most attractive destinations, where international demand plays a central role.

PHOTO JOHANNES WILENIUS

In addition to increased seasonality and the dominance of top destinations, the average length of stay for leisure travellers shortened in 2024.

Extending the length of stay, balancing seasonal demand, and promoting more even regional distribution are key principles of sustainable tourism.

The share of tourism exports in Finland's total service exports declined in 2024 compared to the previous year and remains below pre-pandemic levels. This may reflect competitiveness challenges in less attractive tourism regions.

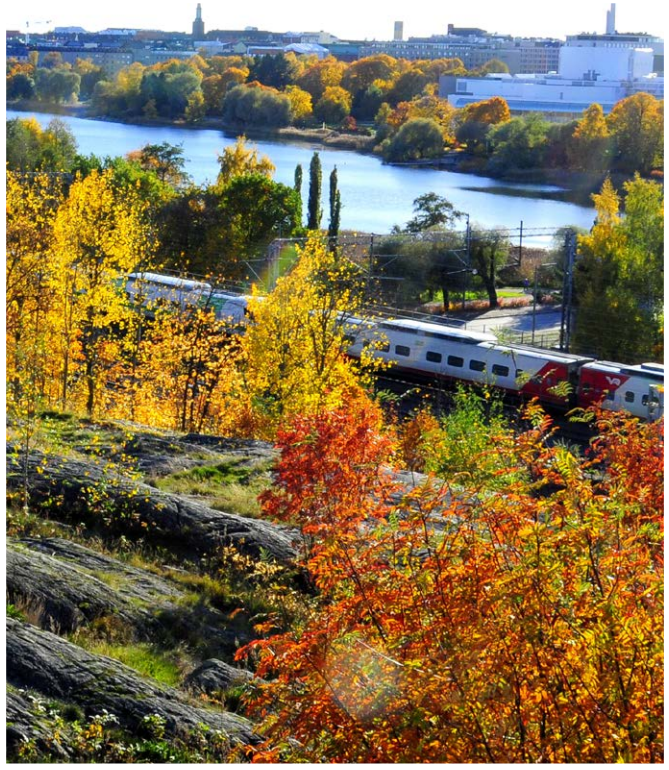


PHOTO CARMEN NGUYEN

Actions to balance seasonality and extend visitor stays remain crucial for ensuring economically sustainable tourism business.

The *Sustainable Travel Finland* (STF) programme progressed toward its goals in 2024. Tourism operators actively joined the programme and reported benefits such as a better understanding of holistic sustainability, enhanced reputation as sustainable operator, and marketing support. The number of destinations awarded the STF label doubled during the year. The greatest benefit reported by destinations was the commitment of local business networks to sustainable tourism. Both individual companies and destinations must continue to renew their STF labels and complete indicator monitoring forms as required by the programme criteria.

In a global context where sustainability themes are facing a downturn, standing out may become easier - making it even more important for Finnish industry stakeholders to lead by example and actively promote sustainable tourism.

LOCAL PARTICIPATION AND SOCIO-CULTURAL SUSTAINABILITY

From a work-life quality perspective, the 2024 STF results show both positive signs and concerns. Employees in the hospitality sector generally enjoy their work, value diversity, and perceive their workplaces as fair. However, according to a survey by the Service Union United (PAM), every second tourism worker is still considering a career change due to growing financial insecurity. Opportunities for career advancement are also perceived to have declined. Amid a labour shortage, strengthening the meaning-

fulness of work and access to training is essential. Employee well-being is a cornerstone of social sustainability in tourism. The sector also has potential to promote diversity, ensuring that every customer and employee feels safe and welcome regardless of background or identity. However, STF companies still find diversity actions challenging, as they require sufficient resources and expertise.

Tourism development should also involve and listen to local residents. Understanding and respecting local cultures—such as Sámi culture—is essential to ensure authentic, respectful representation, revitalization, and preservation. The Sámi Parliament has published ethical guidelines for Sámi tourism and a guide for responsible travellers visiting Sámi homeland. Regional tourism organizations across Finland could encourage tourism operators to familiarize themselves with these materials.

To strengthen local perspectives and sustainability, an indicator to monitor visitor resiliency could be developed and utilized. Topics such as housing, access to services, and recreational peace are worth examining.

PHOTO **JUSSI HELLSTÉN**

Cultural impact was strengthened in 2024 through new European Cultural Route destinations, including the European Route of Industrial Heritage. The completion of Finland's food tourism strategy supports the country's visibility as a culinary destination. Potential additions to measuring cultural sustainability could include collaboration with cultural actors, integrating cultural offerings into tourism services, and ensuring that locals enjoy the cultural tourism environments and services created. However, defining suitable metrics remains a challenge.

Destination management indicators include the share of residents satisfied with tourism's

PHOTO **VALENTINO VALKAJ**

impact[99] and those satisfied with their ability to influence tourism development[100]. Unfortunately, no data was available for these indicators in 2023 or 2024 due to the high implementation cost, complexity, and difficulty of achieving sufficient response rates in national visitor and resident surveys.

SAFETY, CLIMATE ACTION, AND NATURE-BASED SOLUTIONS AS PART OF SUSTAINABLE TOURISM

In international safety comparisons, Finland performs exceptionally well—this can be considered a competitive advantage, especially as conflicts, inequality, health risks, and climate-related threats elsewhere in the world may reduce the attractiveness of other destinations. The importance of safety is expected to grow in the coming years amid global instability. Tourism marketing can play a key role in strengthening Finland's image as a safe destination and in dispelling misconceptions, for example, about safety in areas near the eastern border.

The fact that all STF companies are engaged in climate mitigation actions demonstrates the tourism sector's commitment to climate responsibility. Most STF companies are actively working on energy savings, waste sorting, and water management, and progress in these areas has been excellent. To further enhance climate impact, more active efforts are needed to reduce emissions from tourism-related mobility.

Visit Finland has recognized climate adaptation as part of its Climate Action Plan. Adapting to changing climate conditions and increasing extreme weather events should be more strongly integrated into industry-wide guidance, training, and communication. Finland's national sustainable tourism indicator system is also being developed to include adaptation-related indi-

[99] STF indicator A 1.2a
[100] STF indicator A 1.2b

cators in collaboration with the industry. Tourism is one of the sectors most vulnerable to changes in seasons, snowfall, and heatwaves.

Currently, 40% of STF companies report actively promoting biodiversity. However, the volume and impact of biodiversity actions are not yet sufficient relative to the potential. Communicating about biodiversity loss and nature-positive tourism can help raise awareness of the interdependence between a thriving natural environment and the viability of the Finnish tourism sector. Nature actions can also be turned into business opportunities. While Finland's tourism sector has made significant progress in ecological sustainability, the accelerating pace of climate change and biodiversity loss calls for faster action. In terms of environmental responsibility, tourism must be part of the solution—not the problem.

KUVA **JUHA TUUNANEN**

PHOTO **RIITTA SUPPERI/KEKSI**

DATA, MEASUREMENT, AND SYSTEMIC CHANGE

During the compilation of this State of Sustainable Tourism report, some challenges emerged, particularly related to the collection and reporting of indicator data. Even minor changes to the indicator monitoring form or calculation models can affect data comparability with previous years. Similarly, if the data source is not an annually completed on indicator form, the data may not be tied to a specific time period. As a result, figures in the Power BI-based STF statistics report may differ from those published in this report: the STF statistics report reflects the current status of companies, while this report focuses on the situation during the review year.

These insights are being used to improve data collection and reporting tools. Common barriers to measurement include the high cost of information systems and the lack of clear definitions. Continuous analysis, interpretation, and communication of data also require additional resources—yet these are essential for data-driven decision-making. Nevertheless, more data is available than ever before. Therefore, lack of data should not be a barrier to implementing sustainability-enhancing actions.

The lack of clear definitions and the high cost of data collection systems often pose barriers to measurement. Continuous data analysis, interpretation, and communication require extra resources — all of which are essential for data-driven decision-making.

Finland's travel sector is engaged in diverse, active, and internationally recognized efforts to promote sustainability. However, achieving a truly sustainable tourism system still requires

clearer, systemic-level changes. This means that the shift toward more sustainable practices must go deeper than surface-level adjustments and be balanced across all dimensions of sustainability.

National support and monitoring are essential drivers of the tourism sector's sustainability transition. The reflections in this report on defining the boundaries of sustainable tourism are a critical step toward tourism that supports the well-being of nature, people, and the economy. If these boundaries are exceeded, the consequences will be felt in the form of stress on ecosystems, local communities, and travellers alike.

Strengthening knowledge and understanding of sustainable tourism remains crucial. Without it, tourism stakeholders cannot develop a genuine commitment to sustainability or recognize its importance for the long-term viability of the industry.

PHOTO **JUSSI HELLSTÉN**

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Appendices

Appendix 1, State of Sustainable Tourism 2024 report, INDICATORS AND STATISTIC

State of Sustainable Tourism Report 2024

INDICATORS AND STATISTICS

DESTINATION MANAGEMENT

	STF Indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source:	Most recent data year	SDG	ETIS criteria (2016)	GSTC code
	Companies participating in the STF programme (by the end of 2024)	1 436	1 180	942	747	256	22 %		Entire tourism sector	STF STATISTICS	2024		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 2024)	70	65	67	60	5	8 %		Entire tourism sector	STF STATISTICS	2024			
A.1.1	Number of STF-labelled companies (by the end of 2024)	500	387	219	127	113	29 %		STF programme companies	STF STATISTICS	2024	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 2024)	11	5	2	1	6	120 %		STF programme companies	STF STATISTICS	2024			
	Number of companies that have completed the indicator form	495	322	279		173	54 %	Indicator collection started in 2022	STF programme companies	STF STATISTICS	2024			
	Number of destinations that have completed the indicator form	19	19	36		0	0 %	Indicator collection started in 2022	STF programme companies	STF STATISTICS	2024			
A.1.3a	Number of STF-labelled travel products in Visit Finland DataHub	1 719	1 398			321	23 %		DataHub products	DataHub statistics	2024			
A.1.3b	Share of STF-labelled travel products in Visit Finland DataHub	17,6 %	17,8 %			-0.2pps			DataHub products	DataHub statistics	2024	12b	A.1 Sustainable tourism public policy	
A.1.2a	Percentage of residents who are satisfied with the impact of tourism in their city of residence			92 %					All of Finland	Resident survey	2022	11.17	C.5.1 Percentage of residents that are satisfied with the impacts of tourism on the destination's identity	A5 Resident engagement and feedback
A.1.2b	Percentage of residents who are satisfied with their own opportunities to influence tourism development			52 %					All of Finland	Resident survey	2022	11.17	2013: A.1.1.1 Percentage of residents who are satisfied with their participation and influence in tourism planning and development	A5 Resident engagement and feedback
A.2.1a	Percentage of travellers who are satisfied with their overall experience of the destination			93 %					Entire tourism sector	Traveller survey	2022	11, 12	A.2.1 Percentage of tourists and same day visitors that are satisfied with their overall experience in the destination	A6 Visitor engagement and feedback
A.2.1b	Percentage of travellers who consider the destination sustainable			90 %					Entire tourism sector	Traveller survey	2022	11, 12	A.2.1 Percentage of tourists and same day visitors that are satisfied with their overall experience in the destination	A6 Visitor engagement and feedback

ECONOMIC VALUE

	STF indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source:	Most recent data year	SDG	ETIS criteria (2016)	GSTC code
B.1.1	Number of overnight stays per year	22.7 million	22.8 million	22.0 million	17.5 million	-150 000	-1 %		Entire tourism sector	Rudolf statistical database, Statistics Finland	2024	11, 12, 1, 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	10,9	11,2	10,4		-0,3	-3 %		STF programme companies	STF STATISTICS	2024	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	28 %	25 %	23 %	12 %	+3 percentage points			All of Finland	Rudolf statistical database, Statistics Finland	2024	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	80 %	84 %	72 %		-4 percentage points			STF programme companies	STF STATISTICS	2024	11, 12	B.1 Tourism Flow (volume & value) at the Destination	A8 Managing visitor volumes and activities
B.1.2	Share of day-trippers	10 %	10 %			0% units		2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	BORDER SURVEY	2024	8	B.1.2. Number of same-day visitors per month	A8 Managing visitor volumes and activities
B.1.3	The relative contribution of tourism to the local economy (% of GDP)	N/A	2,4 %	2,0 %	1,5 %	+0.4 percentage points		Change 2023 vs. 2022	All of Finland	Rudolf statistical database, Statistics Finland	2023 (preliminary data)	1, 8, 9	B.1.3 Relative contribution of tourism to the destination's economy (% GDP)	GSTC: B1 Measuring the economic contribution of tourism
B.1.4b	Average daily spending per tourist	77 €	74 €			3 €	4 %	2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	BORDER SURVEY	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
B.1.6	Dependency on the top 3 countries of origin (%)	29 %	30 %	31 %	33 %	-1 percentage point			All of Finland	Rudolf statistical database, Statistics Finland	2024	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
B.1.7	Annual tourism consumption in Finland	N/A	€16.8 billion	€15.8 billion	€11.5 billion	€1.0 billion	6 %	Change 2023 vs. 2022	All of Finland	Rudolf statistical database, Statistics Finland	2023 (preliminary data)	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)	2,2	2,3	2,2		-0,1	-4 %		STF programme companies	STF STATISTICS	2024	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)	1,8	1,9	1,9	1,9	-0,1	-5 %		Entire tourism sector	Rudolf statistical database, Statistics Finland	2024	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	N/A	5,3 %	5,0 %	4,6 %	+0.3 percentage points		Change 2023 vs. 2022	Entire tourism sector	Rudolf statistical database, Statistics Finland	2023 (preliminary data)	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	N/A	30,7 %	35,0 %		-19.7pps		Figures for 2024 will be confirmed later on	STF programme companies	STF STATISTICS	2024	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)	117	104	184		13	13 %		All of Finland	STF STATISTICS	2024	4, 8	B.3 Quantity and quality of employment	B2 Decent work and career opportunities

	Other indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source	Most recent data year	SDG	ETIS criteria (2016)	GSTC code
	Arrivals in accommodation establishments	12.5 million	12.3 million	11.5 million	9.0 million	204 400	2 %		All of Finland	Rudolf statistical database, Statistics Finland	2024	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Arrivals in Finland	4.9 million	4.7 million			0.2 million	4 %	2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	BORDER SURVEY	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		256 030	256 880	257 250	-850	-0,33 %	Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023	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	163 700	166 200	166 000	155 900	-2 500	-2 %		All of Finland	Rudolf statistical database, Statistics Finland	2024	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)		39,93 %	38,04 %	31,35 %	+1.89% units		Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023	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)	50,0 %	49,8 %	47,5 %	39,0 %	+0.2pps			All of Finland	Rudolf statistical database, Statistics Finland	2024	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Progress in tourism recovery (%)		98,86 %	95,13 %	75,72 %	+3.7pps		Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Seasonality of tourism (coefficient of variation)		34,06	35,45	40,86	-1,39	-3,9 %	Change 2023 vs. 2022	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.2 Tourism enterprise(s) performance	B1 Measuring the economic contribution of tourism
	Travel intensity (Visits and nights per Occupant)		4,09	3,95	3,16	0,14	3,5 %		Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Dependency on the top 3 countries of origin (%)		8,10	7,08	3,98	1,02	14 %	Change 2023 vs. 2022	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Tourism Diversity (Index)		0,85		0,84	0,01	1,2 %	Change 2023 vs. 2021	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	Tourism's share of employment (%)		6,66 %	6,18 %	5,83 %	+0.48 pps		Change 2023 vs. 2022	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.3 Quantity and quality of employment	B2 Decent work and career opportunities
	Average travel costs (PPS / night)		101,71	90,25	56,85	11,46	12,7 %	Change 2023 vs. 2022	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.1 Tourism flow (volume and value) at destination	B1 Measuring the economic contribution of tourism
	The direct economic impact of tourism		3,19 %	1,50 %	1,20 %	+1.69 pps			Entire tourism sector	EU TOURISM DASHBOARD	2023			
	Share of e-commerce sales		48,50 %	58,40 %	41 %	-9.9pps			Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Enterprise using social media (%)		75,40 %		65 %	+10.4pps		Change 2023 vs. 2021	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Internet speed at tourist destinations		76,03 %		53,22 %	+22.8pps		Change 2023 vs. 2021	Entire tourism sector	EU TOURISM DASHBOARD	2023	8	B.2 Tourism enterprise(s) performance	B8 Access for all
	Personnel training on digital skills			22,70 %					Entire tourism sector	EU TOURISM DASHBOARD	2022	8	B.2 Tourism enterprise(s) performance	B8 Access for all

SOCIAL AND CULTURAL IMPACT

	STF indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source:	Most recent data 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)	1,11	1,13	1,09	0,87	-0,02	-2 %		All of Finland	Rudolf statistical database, Statistics Finland	2024	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	0,18	0,18	0,14	0	0 %		All of Finland	Rudolf statistical database, Statistics Finland	2024			A8 Managing visitor volumes and activities
C.1.6.1	Percentage of people working in the tourism industry who enjoy their work	78 %						Indicator deployed 2025	All of Finland	PAM member survey	2024			
C.1.6.2a	Percentage of people working in the tourism industry who are satisfied with the cohesion of their work community	79 %	86 %			-7 percentage points		Indicator deployed 2024	All of Finland	PAM member survey	2024			
C.1.6.2b	Percentage of people working in the tourism industry who feel the work community is fair	73 %						Indicator deployed 2025	All of Finland	PAM member survey	2024			
C.1.6.3	Percentage of people working in the tourism sector who feel that their job skills are good and that they receive enough training	56 %	74 %			-18 percentage points		Indicator deployed 2024	All of Finland	PAM member survey	2024			
C.1.6.4	Percentage of people working in tourism who are satisfied with their chances of advancement in the industry	25 %	42 %			-17 percentage points		Indicator deployed 2024	All of Finland	PAM member survey	2024			

C.1.6.5	Percentage of people working in the tourism industry who are interested in a change of industry	53 %	54 %			-1 percentage point		Indicator deployed 2024	All of Finland	PAM member survey	2024			
C.1.6.6	Percentage of people working in the tourism industry who feel that occupational safety is taken care of	80 %						Indicator deployed 2025	All of Finland	PAM member survey	2024			
C.1.6.7	Percentage of people working in the tourism industry who feel that employee diversity is valued in the workplace	76 %						Indicator deployed 2025	All of Finland	PAM member survey	2024			
C.2.2	This country acts responsibly in the realms of international peace and security	Rank 7	Rank 10					Indicator deployed 2025	All of Finland	National Brand Index	2024			
C.2.3	Finland's ranking in the International Peacefulness (index)	1.474 (rank 13/163)	1.484 (rank 15/163)	1.511 (rank 16/163)	1.443 (rank 12/163)	Rank +2		Indicator deployed 2025	All of Finland	Global Peace Index GPI	2024			
C.2.4	Finland's ranking as an LGBTQ+ -friendly travel destination (index)		300 (rank 22)					Indicator deployed 2025	All of Finland	LGBTQ+ Travel Safety Index	2023			
C.2.5	Finland's risk exposure to natural disasters and the ability of tourists to cope with natural disasters (index)	1.54 (rank 164)	1.43 (rank 165)			-0.11 (figure decreased)		Indicator deployed 2025	All of Finland	World Risk Report	2024			
C.2.6	Finland's ranking in the TTDI index (Health & Hygiene Pillar)	6.05 (rank 18)			5.80 (placement 26)	0,25	4 %	Indicator deployed 2024	All of Finland	Travel & Tourism Development Index	2024			
C.2.6	Finland's ranking in the TTDI index (Safety & Security pillar)	6.56 (rank 4)			6.31 (rank 13)	0,25	4 %	Indicator deployed 2025	All of Finland	Travel & Tourism Development Index	2024			
C.4.1a	Share of companies providing services for persons with reduced mobility	40 %	11 %	27 %		stayed the same		The reporting used the situation of companies in the same year	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+ travellers	58 %	33 %	32 %		+4 percentage points		The reporting used the situation of companies in the same year	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	23 %	24 %			-1 percentage point			?	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 LGBTQ+ travellers	6 %	6 %			0% units			?	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)	2,7	3,0	3,0		-0,3	-10 %		STF programme companies	STF STATISTICS	2024	10		
C.5.2a	Number of destinations with UNESCO World Heritage, Intangible Cultural Heritage, Cultural Routes (Council of Europe), or Geoparks status	170	139	102		31	22 %		All of Finland	The Finnish Heritage Agency, UNESCO, Council of Europe	2024	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	1471	1472	1471		-1	0 %		All of Finland	The Finnish Heritage Agency	2024	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

	STF indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source	Most recent data year	SDG	ETIS criteria (2016)	GSTC code
D.1.1	Distribution of mode of transport upon arrival %	By air 61% By sea 39%	By air 62% By sea 38%			Flying -1 percentage points. By sea +1 percentage point.		2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	BORDER SURVEY	2024	9, 13	D.1.1 Percentage of tourists and same-day visitors using different modes of transport to	D11 Low-impact transportation
D.1.2	Share of train journeys			14.5%	11.3%	+3.2 percentage points		Change 2022 vs. 2021	All of Finland	EU TOURISM DASHBOARD	2022	9, 13, 11	D.1 Reducing transport impact	D11 Low-impact transportation
D.1.4.	Average climate impact of the trip (CO2e kg) per day	63 kg CO2	61 kg CO2			2 kg CO2	3 %	2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	Foreign tourists	BORDER SURVEY	2024	13		
D.2.1	Share of companies actively engaged in climate change mitigation activities	100 %	100 %	98 %		0% units			STF programme companies	STF STATISTICS	2024	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	14	15	13		-1	-7 %		STF programme companies	STF STATISTICS	2024	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	46,1 %	51,6 %	29,1 %		-5.5pps			STF programme companies	STF STATISTICS	2024	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	4,69	4,52	4,32		0,17	4 %		STF programme companies	STF STATISTICS	2024	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	6,20	6,20	5,80		0,00	0 %		STF programme companies	STF STATISTICS	2024	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	92,0 %	89,9 %	85,8 %		+2.1 percentage points			STF programme companies	STF STATISTICS	2024	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	4,93	4,85	4,58		0,08	2 %		STF programme companies	STF STATISTICS	2024	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	97,4 %	96,8 %	90,3 %		+0.6pps			STF programme companies	STF STATISTICS	2024	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	6	7	6		-1,00	-14 %		STF programme companies	STF STATISTICS	2024	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	84 %	69 %	71 %		+15 percentage points			STF programme companies	STF STATISTICS	2024	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 %	42 %	46 %		-1 percentage point			STF programme companies	STF STATISTICS	2024	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	4	5	5		-1	-20 %		STF programme companies	STF STATISTICS	2024	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 %	9,1 %		+0.1 percentage points		Change 2023 vs. 2022	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	63 %	63 %	64 %		0% units			STF programme companies	STF STATISTICS	2024			D2.6 Minimize pollution (industry criteria)
	Average number of actions contributing to sustainable food choices	3	3	3		0	0 %		STF programme companies	STF STATISTICS	2024			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	85 %	92 %			-7 percentage points			STF programme companies	STF STATISTICS	2024	14, 15		D1 Protection of sensitive environments D2 Visitor management at natural sites D3.3 Visits to natural sites (industry criteria)

	Other indicators	Value 2024	Value 2023	Value 2022	Value 2021	Change 2024 vs. 2023 (absolute change / % point change)	Change Percentage 2024 vs. 2023 (percentagechange; not counting percentages)	Notes on other changes (source, year, sample)	Sample/Share	Source	Most recent data year	SDG	ETIS criteria (2016)	GSTC code
D.2.1.2	Number of 'Glasgow Declaration on Climate Action in Tourism' signatories in Finland	89	67	60	3	22	33 %		Entire tourism sector	SIGNATORIES OF THE GLASGOW DECLARATION	2024	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.7.1.3b	Number of visitors to national parks, national hiking areas and customer service points	8.6 million	8.7 million	8.5 million		-0.1 million	-1 %		All of Finland	METSÄHALLITUS	2024	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)		122.47	124.44	193.55	-1.97	-1.6%	Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023	13	D.2 Climate change	D10 GHG emissions and climate change mitigation
	Energy intensity of tourism (TJ/EUR million)				5,29				All of Finland	EU TOURISM DASHBOARD	2021	7	D.6 Energy usage	D5 Energy conservation
	Excellent bathing water (%)		88.33%	90.64%	89.56%	-2.3 pps		Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023	6, 14	D.5 Water management	D7 Water quality
	Dependence on long-haul tourist markets (%)		10.28%	8.1%	3.78%	2.2 pps		Change 2023 vs. 2022	All of Finland	EU TOURISM DASHBOARD	2023			
	Total emissions of foreign tourists arriving in Finland (all)	3 081 800 tonnes CO2	3 159 500 tonnes CO2			-77,700 tonnes CO2	-2 %	2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	Border Survey	2024			
	For foreign travellers going to Finland carbon efficiency of journeys, EUR per kg CO2	1,2	1,2			0	0 %	2024 applies to the whole year 2023 rolling 12-month period (03/23-02/24)	All of Finland	Border Survey	2024			