

Arctic Sustainable Destination Finland

**Online survey and interviews with select UK & German
Tour Operators and Travel Agents**

**Interviews with Global Tourism
Thought Leaders**



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Online survey & interviews

The project was devised in order to establish key UK and German tour operators' and travel agents' attitudes towards sustainable and responsible travel and sustainability certification. We were also able to gain an insight into their sustainability practices and programs.

The online survey and interview questions were built in co-operation between Visit Finland and Planet Egan Ltd in July 2018

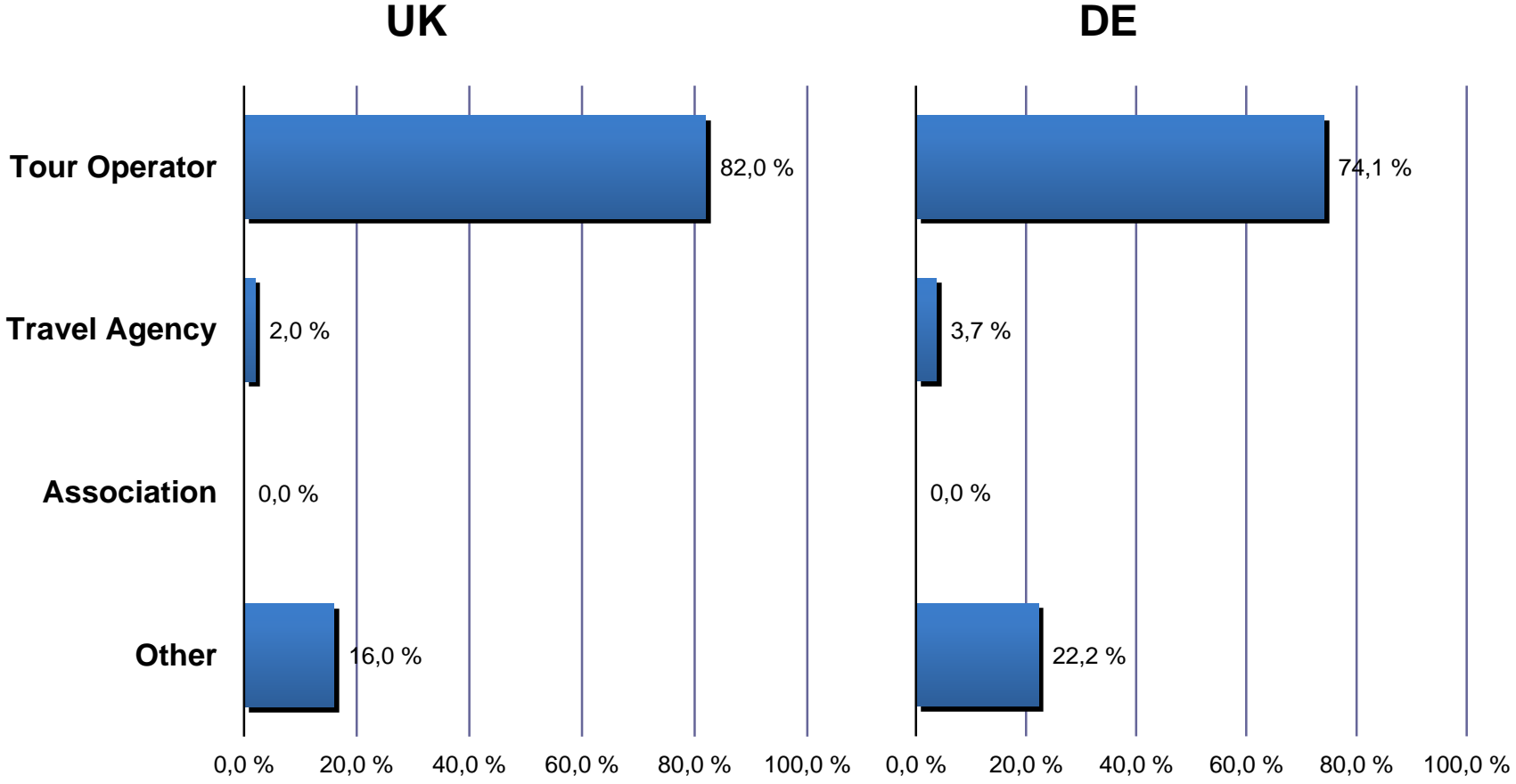
Responses were received and analysed during August and September 2018 by Planet Egan Ltd

Amount of respondents: UK market 51 and German market 27

Respondents were predominantly Tour Operators and Travel Agents.



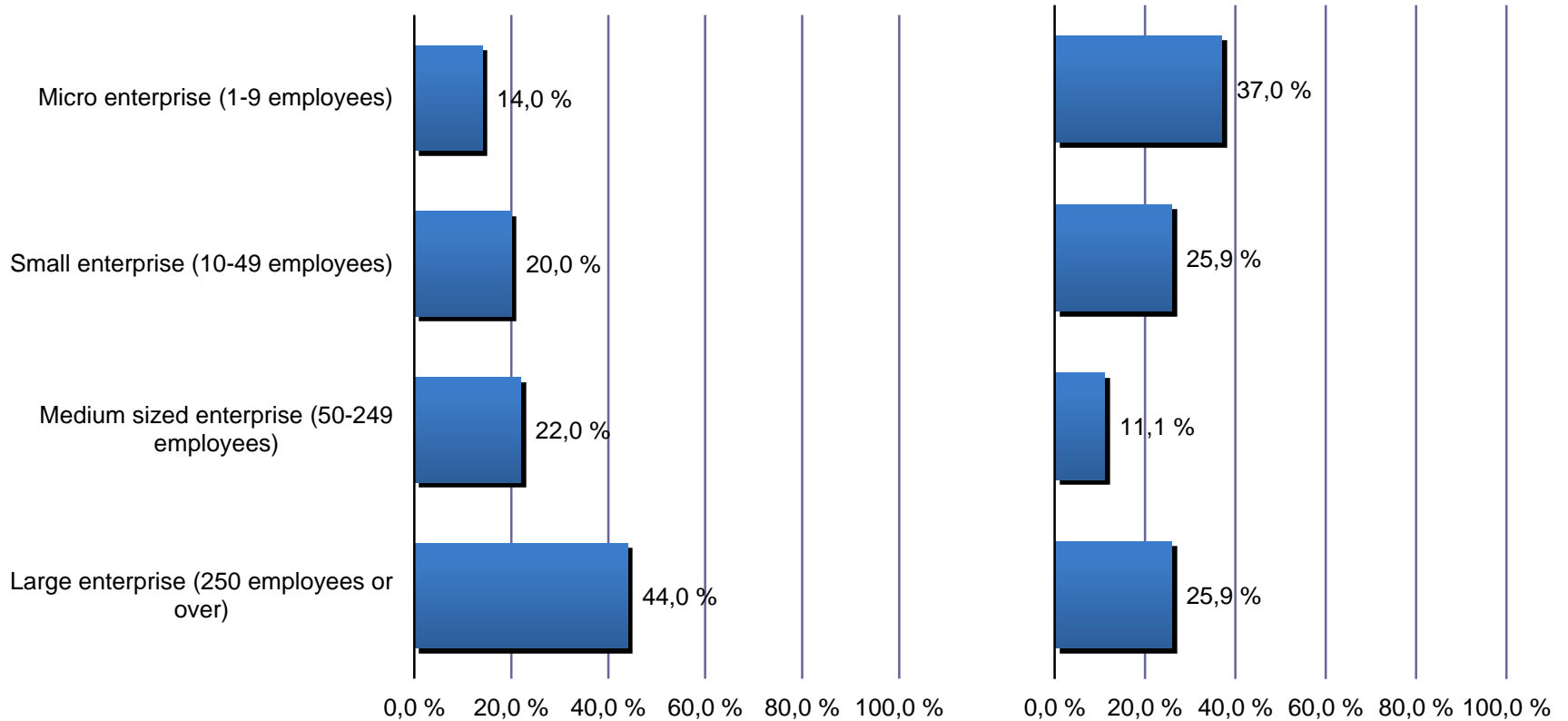
What type of organisation do you represent?



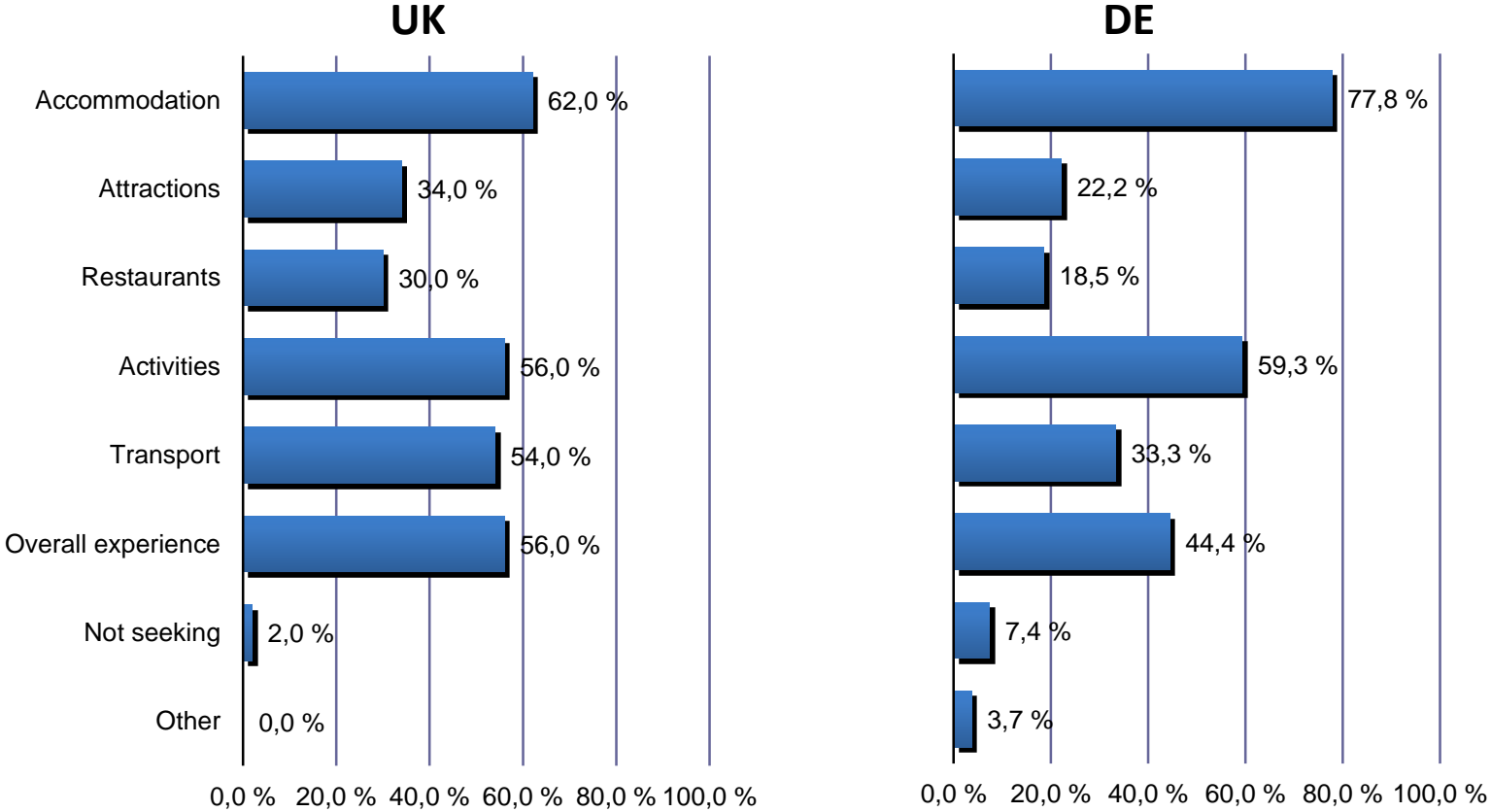
Company size

UK

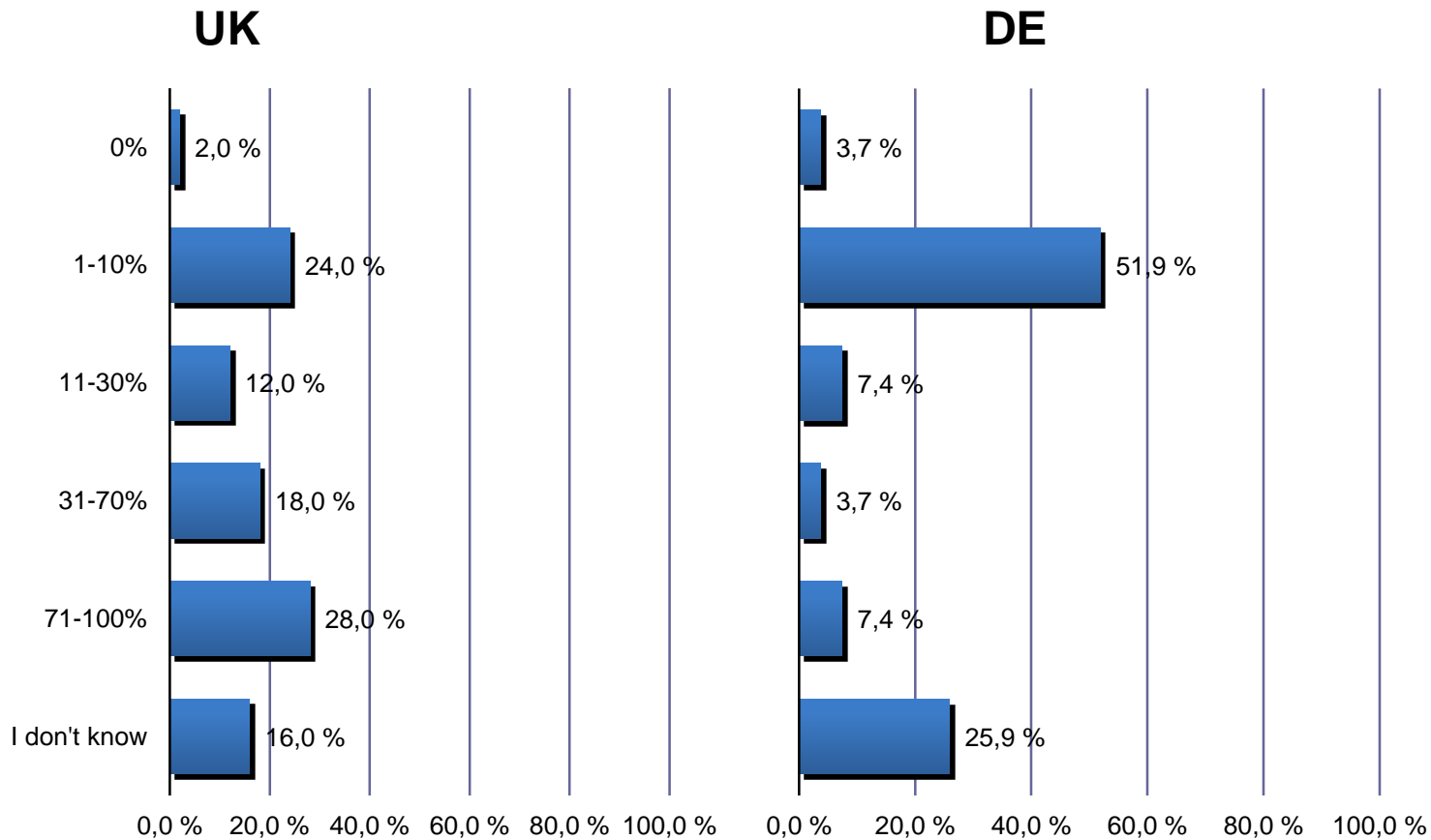
DE



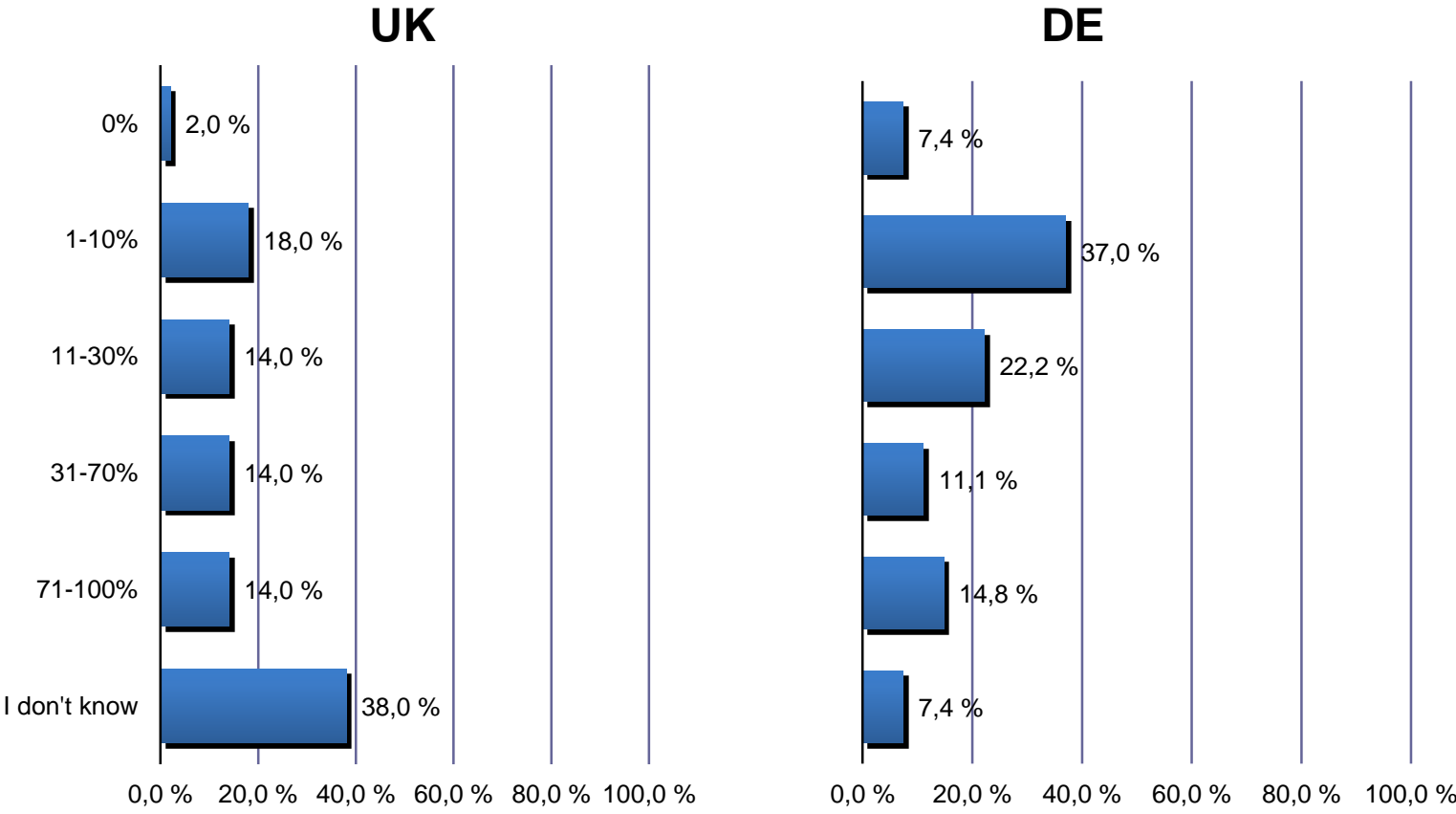
Sustainable products or responsible suppliers most in demand



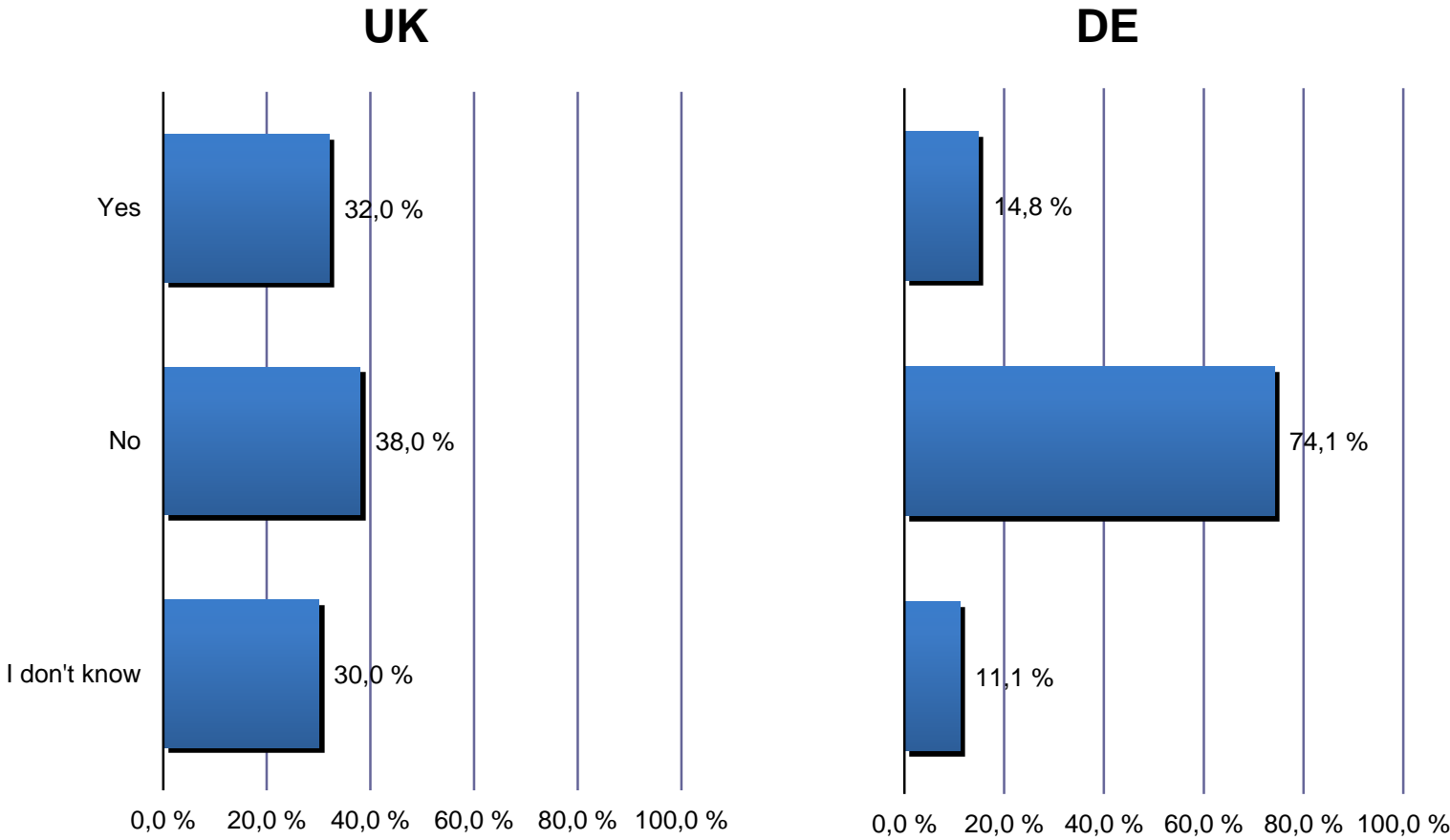
Average percentage of sustainable product portfolio



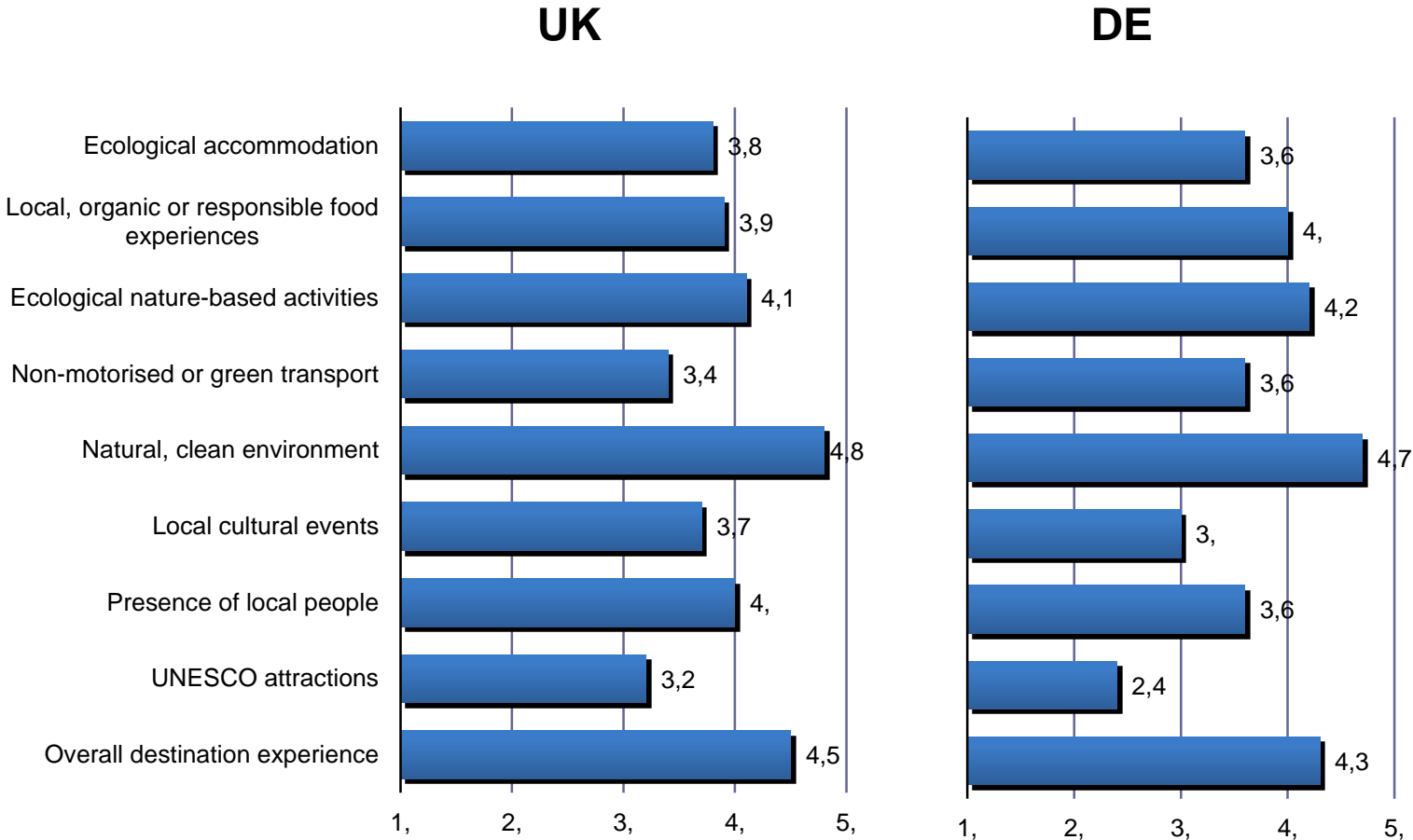
Annual bookings with emphasis on sustainability



Do your customers ask for more sustainable products?

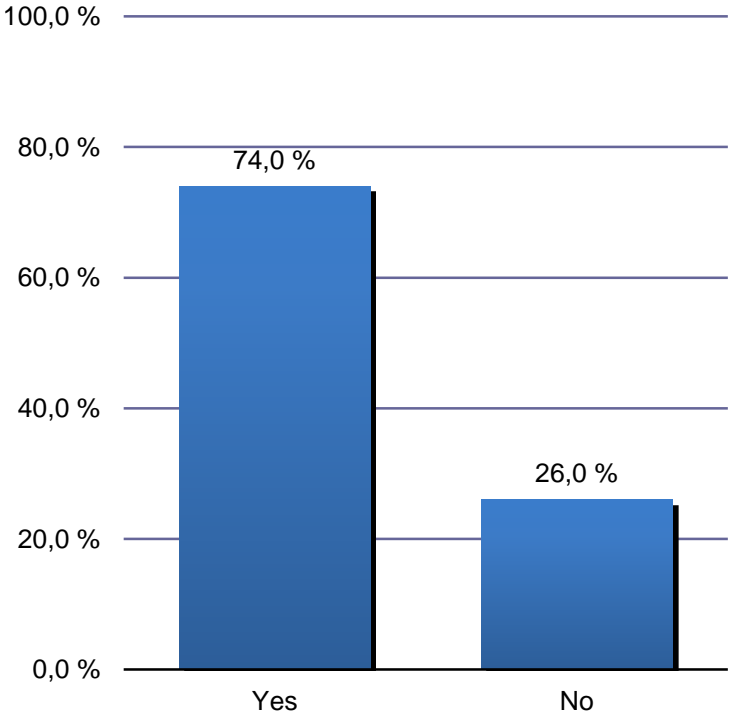


Which destination aspects do you consider the most important, with regards to sustainable tourism products in Finland?

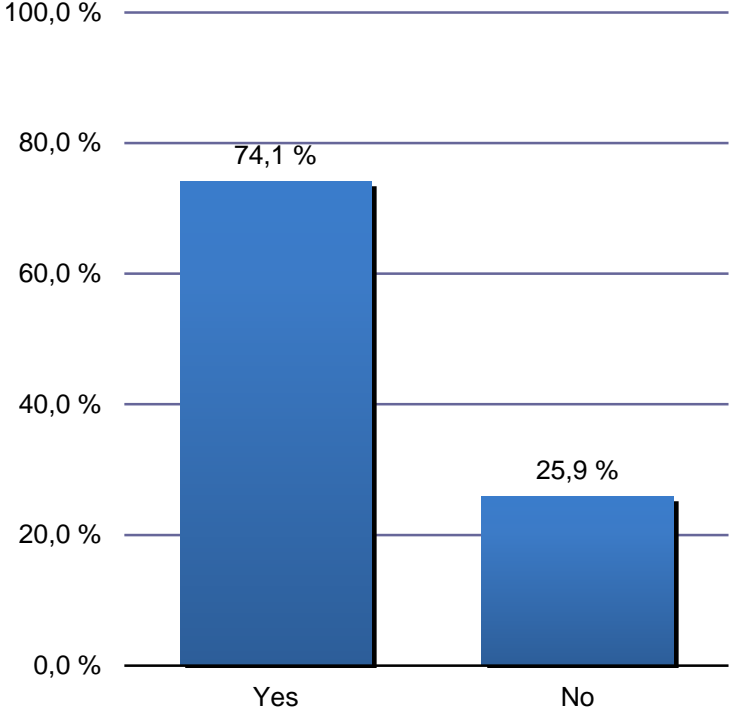


Do consumers think there is an additional “cost” on sustainable products?

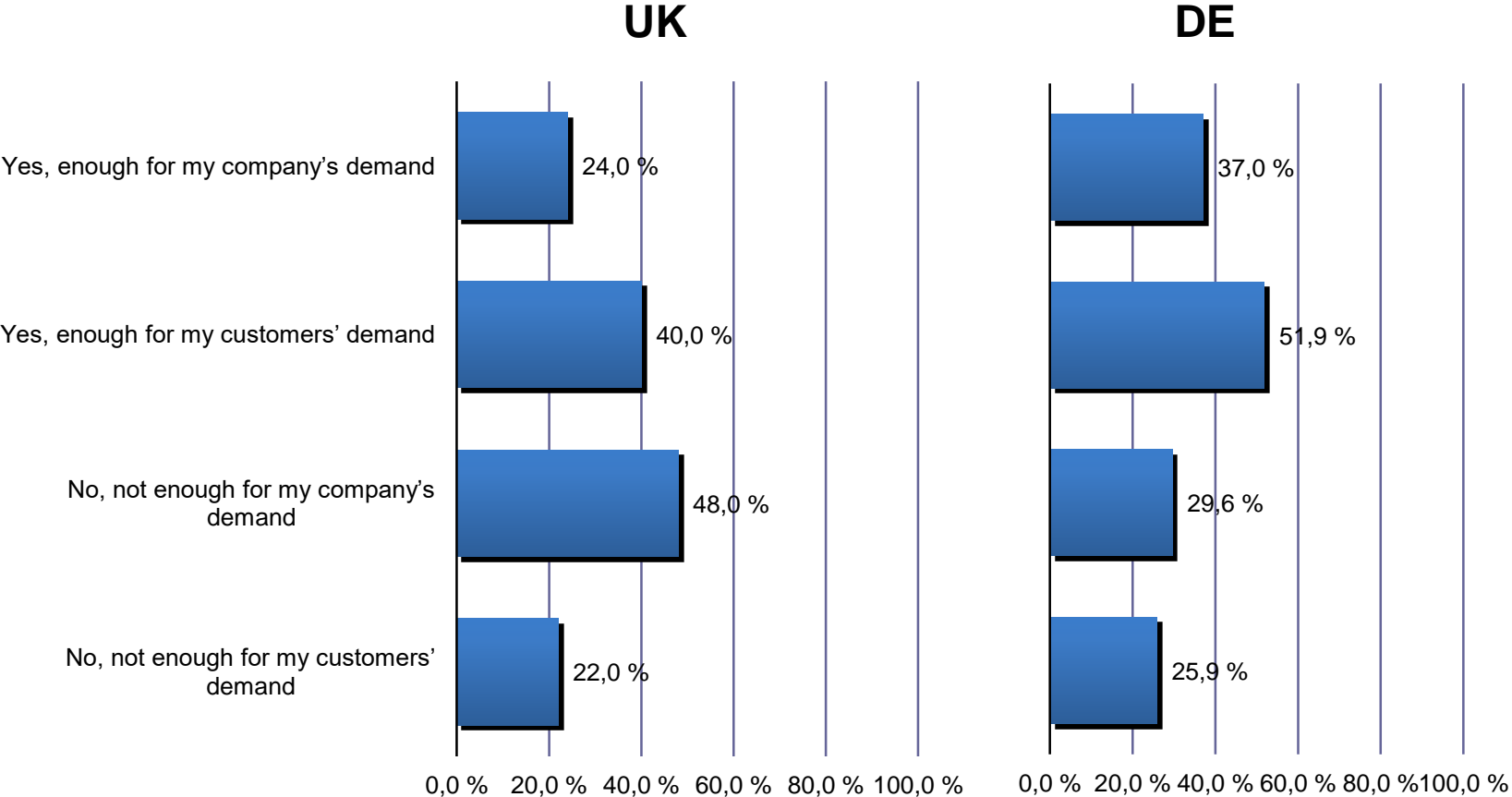
UK



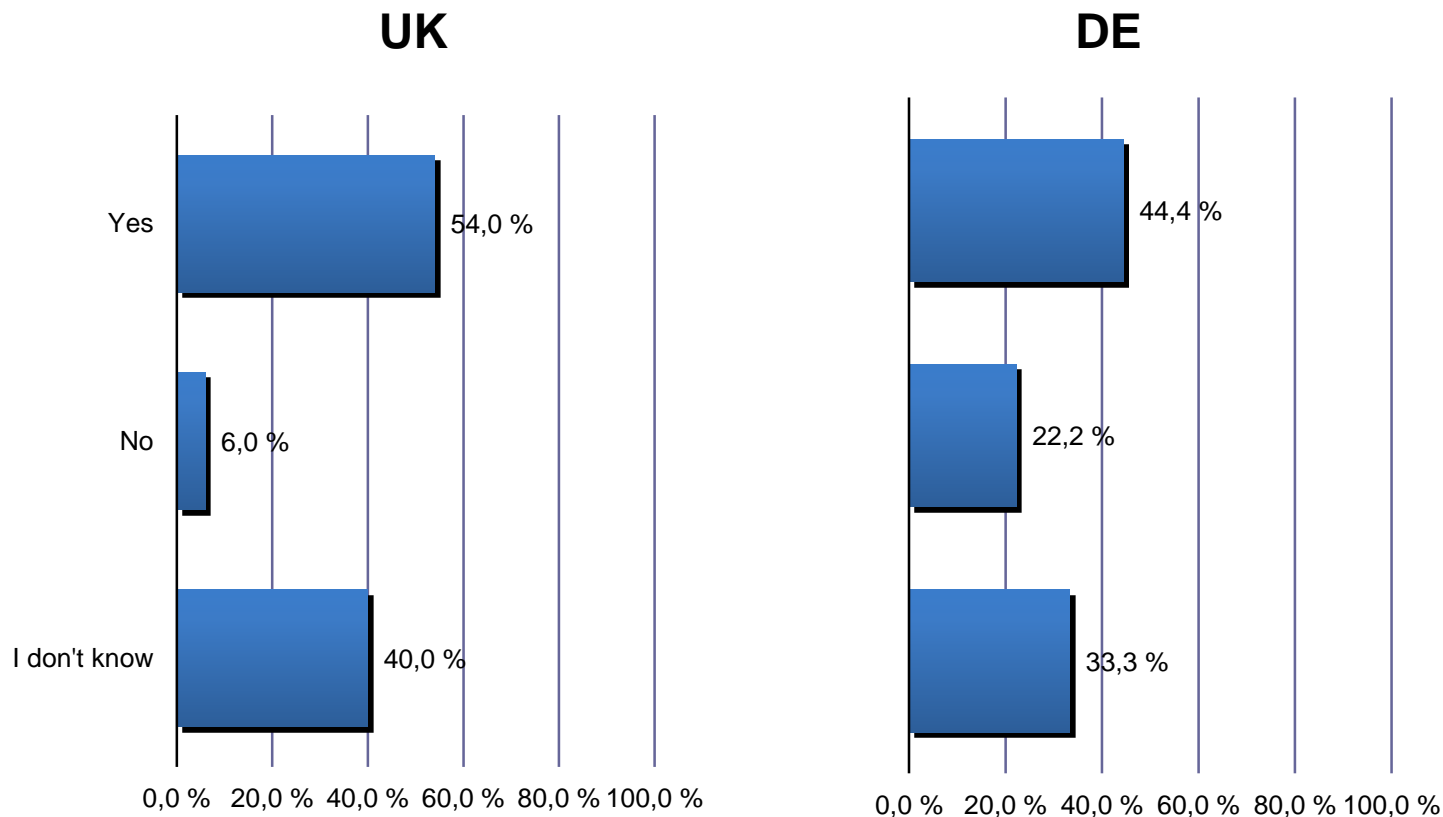
DE



Are destinations able to offer enough sustainable products?



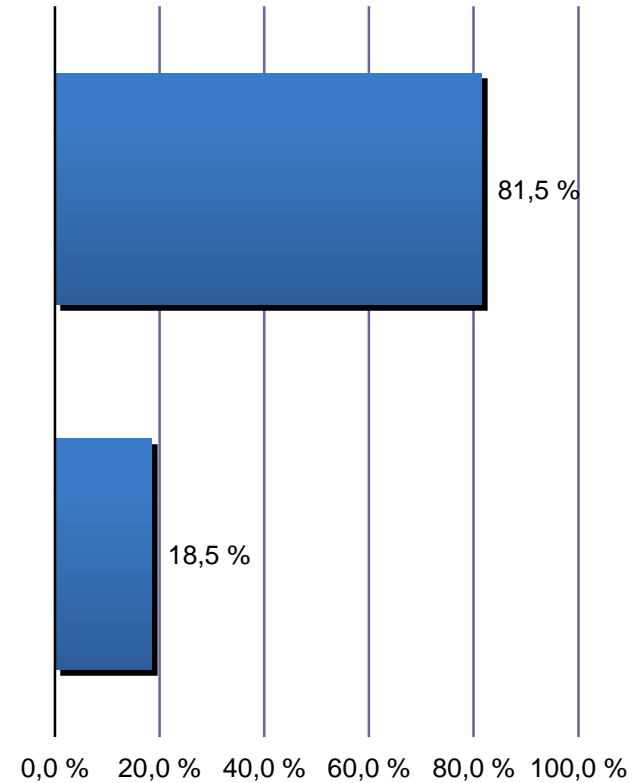
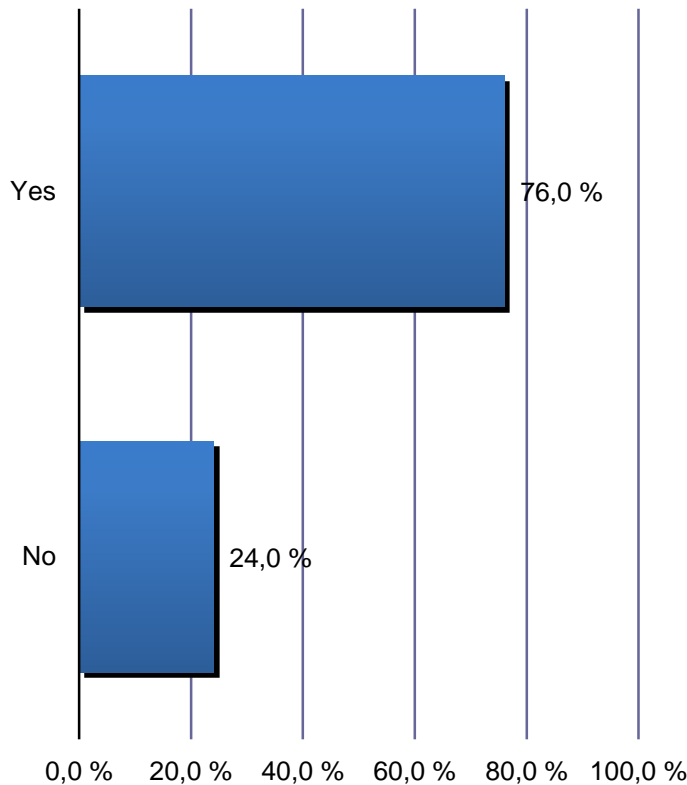
Could you increase sales if destinations offered more sustainable products?



Are you actively promoting sustainability?

UK

DE



Are you actively promoting sustainability?

Some interesting comments from UK operators:

“All of our holidays are **Carbon Neutral**”

“We do have general information about sustainability, but prefer to **embed the values within the product description**, the actual experience, picking the right suppliers etc”

“Selling authentic resorts and accommodation in natural unspoiled settings. **Anyone can write statements on websites - its practical actions that matter**”

“Through how we describe our products, by **selling experiences with local stories attached**. Not by using the word sustainability, which quickly gets too technical for a traveler who want to go on holiday”



Are you actively promoting sustainability?

Some interesting comments from UK operators:

“I launch on 31st October and will develop an **Eco filter for accommodation** and have products on the home page related to sustainability”

“At this stage we rarely have clients specifically requesting a 'sustainable' product. As it currently stands, we as a company, consciously look to work with, where possible, **local suppliers and producers that offer authentic experiences and thus supporting local infrastructure**. We do of course value the supplier credentials and would actively **support a supplier with credentials vs one that does not**”

Are you actively promoting sustainability?

Some interesting comments from German operators:

“Support small, local tour operators that offer nature and culture-related activities; **draw customers' attention to regions other than the main attractions**, distribute them more evenly throughout the country in order to **protect nature and better distribute economic revenue**”

“Sustainability has become much more important in recent years - also in the **purchasing decisions of our customers**”

“We will add new "green" round trips to our offer with **Co2 offsetting**”



Are you actively promoting sustainability?

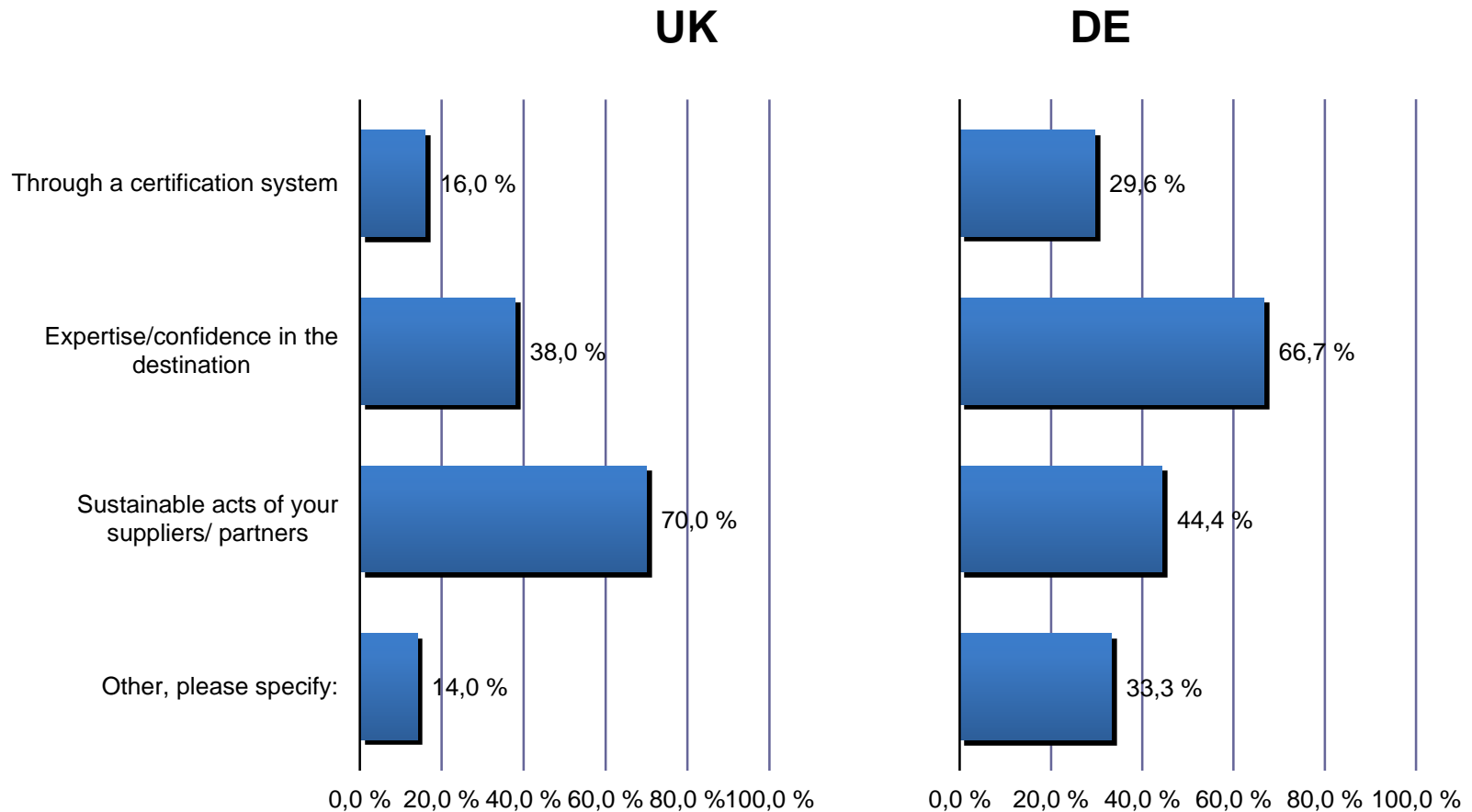
Some interesting comments from German operators:

“**Co2 offsetting of all travel routes** in the country, optional Co2 offsetting of all flights”

“New product lines: **bicycle tours**, new products: Travelling by **train and ship/ferry**”

“**Child protection** commitment. Promotion of **sustainable food**. **Animal welfare policy**”

How do you showcase to your clients that a destination or product is more sustainable?



How do you showcase to you clients that a destination or product is more sustainable?

Some interesting comments from DE operators:

“Transparent **sustainability reporting**”

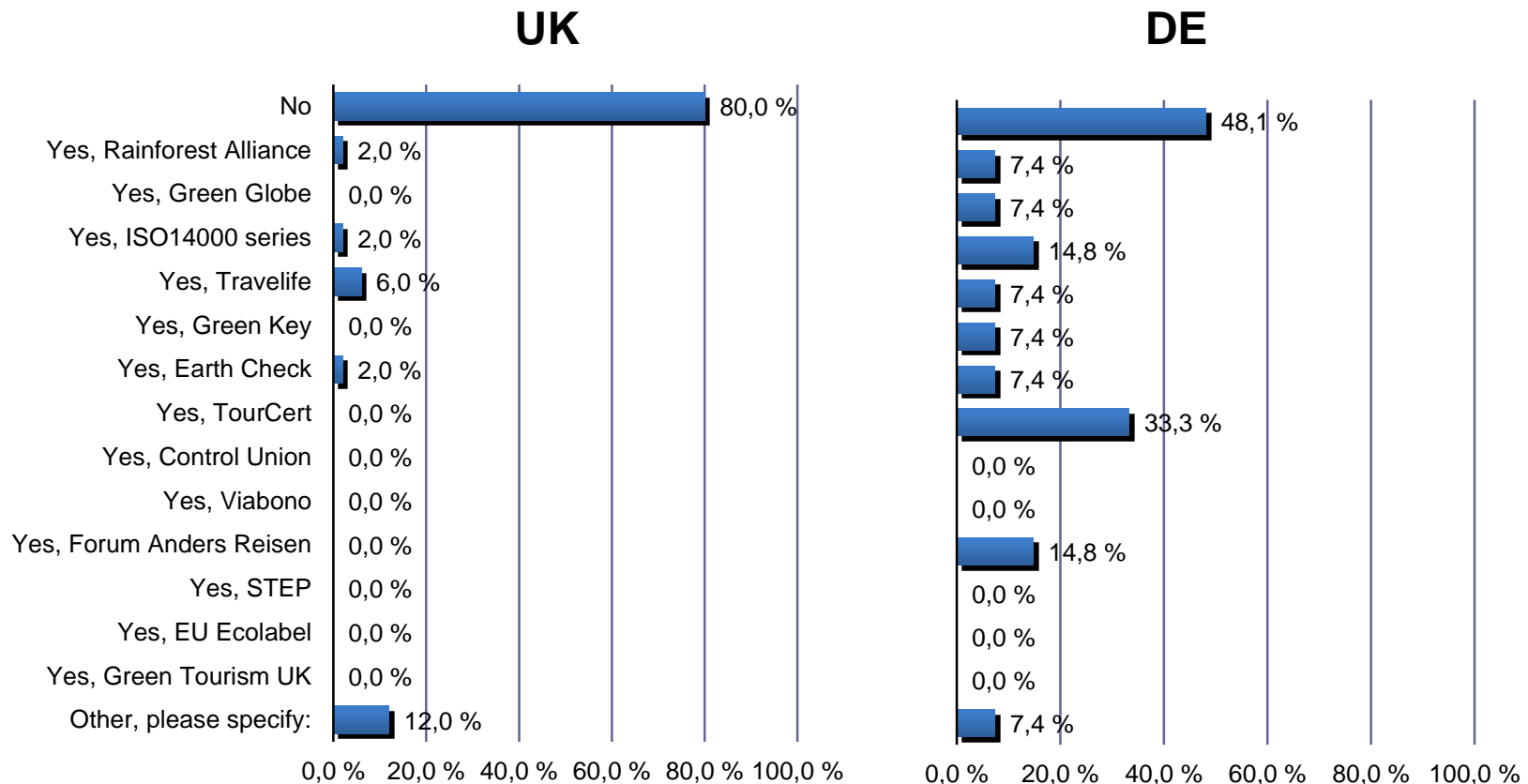
“Sustainability **Awards**”

“Through sustainable products and services in the target destinations.
Through our **own projects on the ground**”

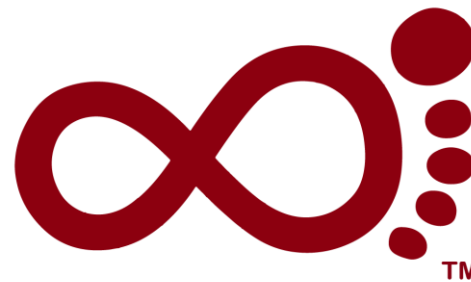
“We do not advertise individual products as sustainable. **Sustainability is made visible to the outside through** the TourCert **certification** and also through membership with the Forum Anders Reisen”



Does your company use a specific accreditation / certification system



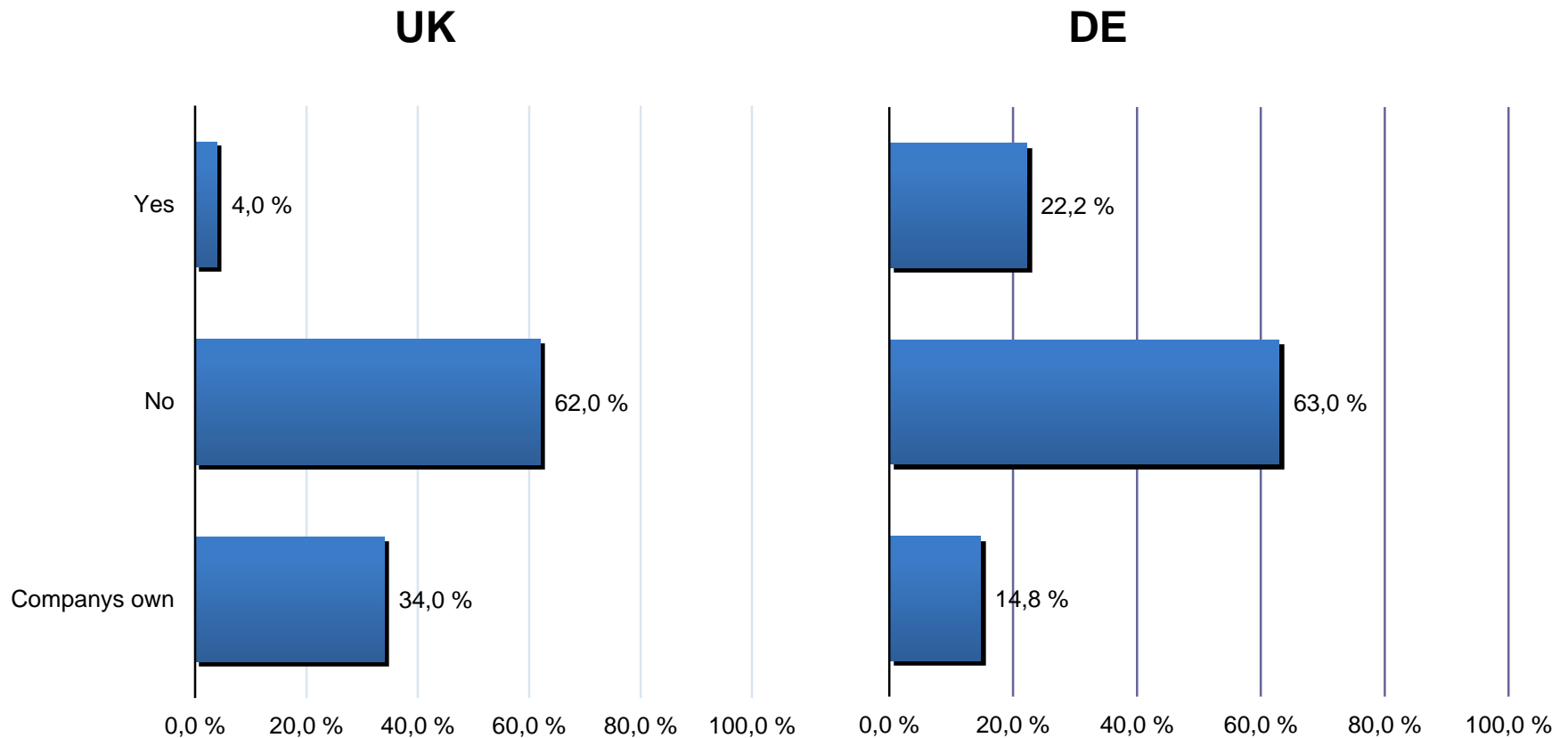
Our label is based partly on GSTC (Global Sustainable Tourism Council) accredited certifications and partly on self-assessments of the service providers.



GSTC



Do you seek specific certifications when sourcing sustainable destinations/ products/ suppliers?



**Vakinn Eco
Certificate**

**Fair Trade and Blauer Engel
- The Blue Angel is a
German certification for
products and services that
have environmentally
friendly aspects**

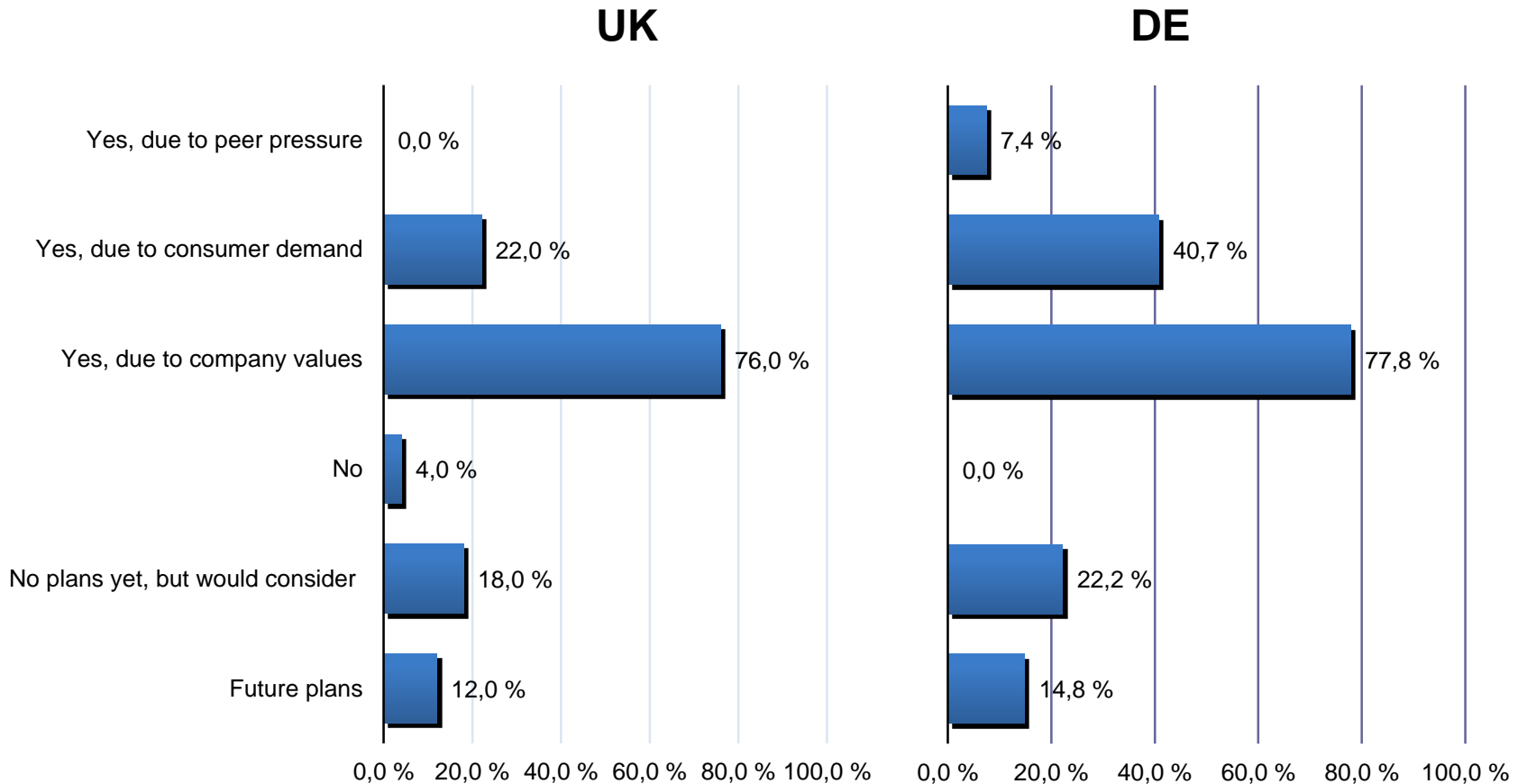
**A
certification
approved by
Global
Sustainability
Tourism
Council**

Certifications

**GSTC
recognised
standards;
additionally
Supplier
Codex**

**Yes.
Certification
according to
GSTC**

Are you aiming to increase your sustainable product/destination portfolio?



Please share short details on your future plans on increasing your sustainability portfolio

UK operator

We do not currently market sustainability. We choose to ensure the majority of our products ARE sustainable so the client is always making a positive choice, whether they know it or not.

The company is built on the principles of responsible tourism, and that will always be the core of the company

UK operator

Please share short details on your future plans on increasing your sustainability portfolio

German operator

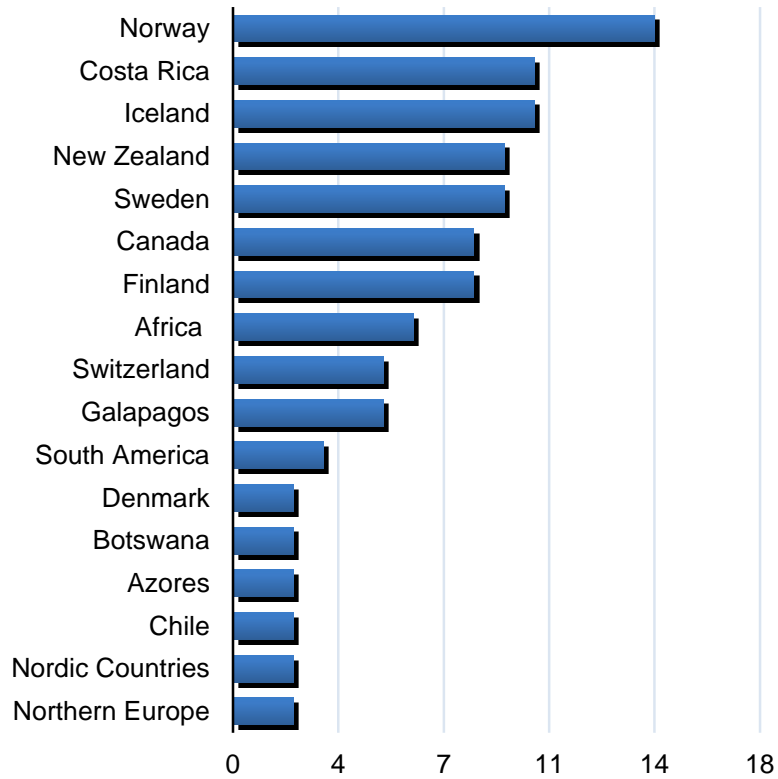
Creation of more offerings with a focus on sustainability; sustainability aspects are increasingly integrated into our sales activities

Focus on sustainable experiences that touch the soul

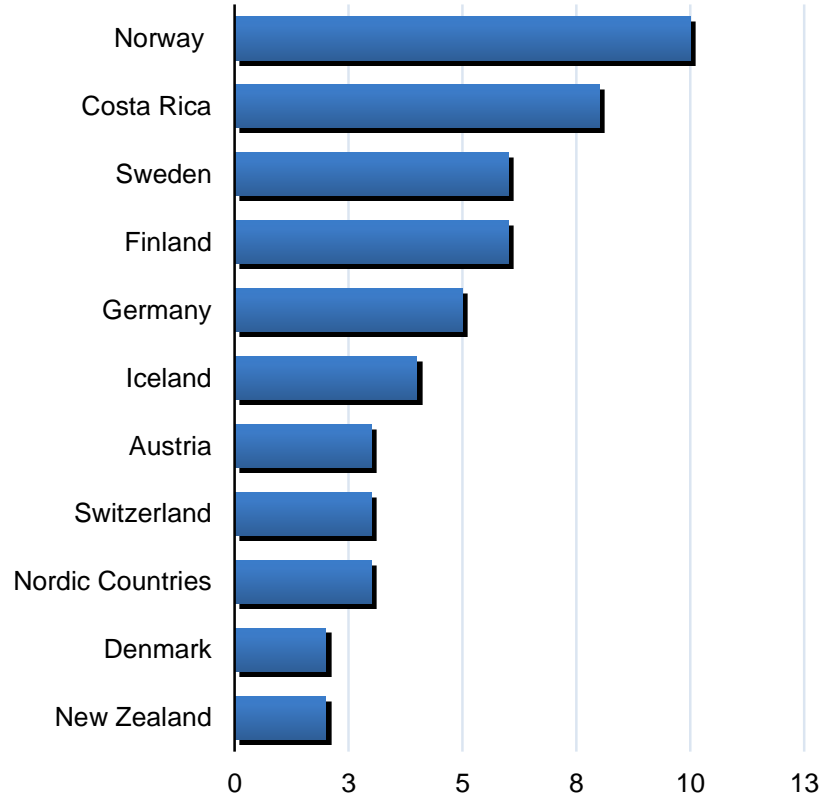
German operator

Most Sustainable Countries - Top of Mind

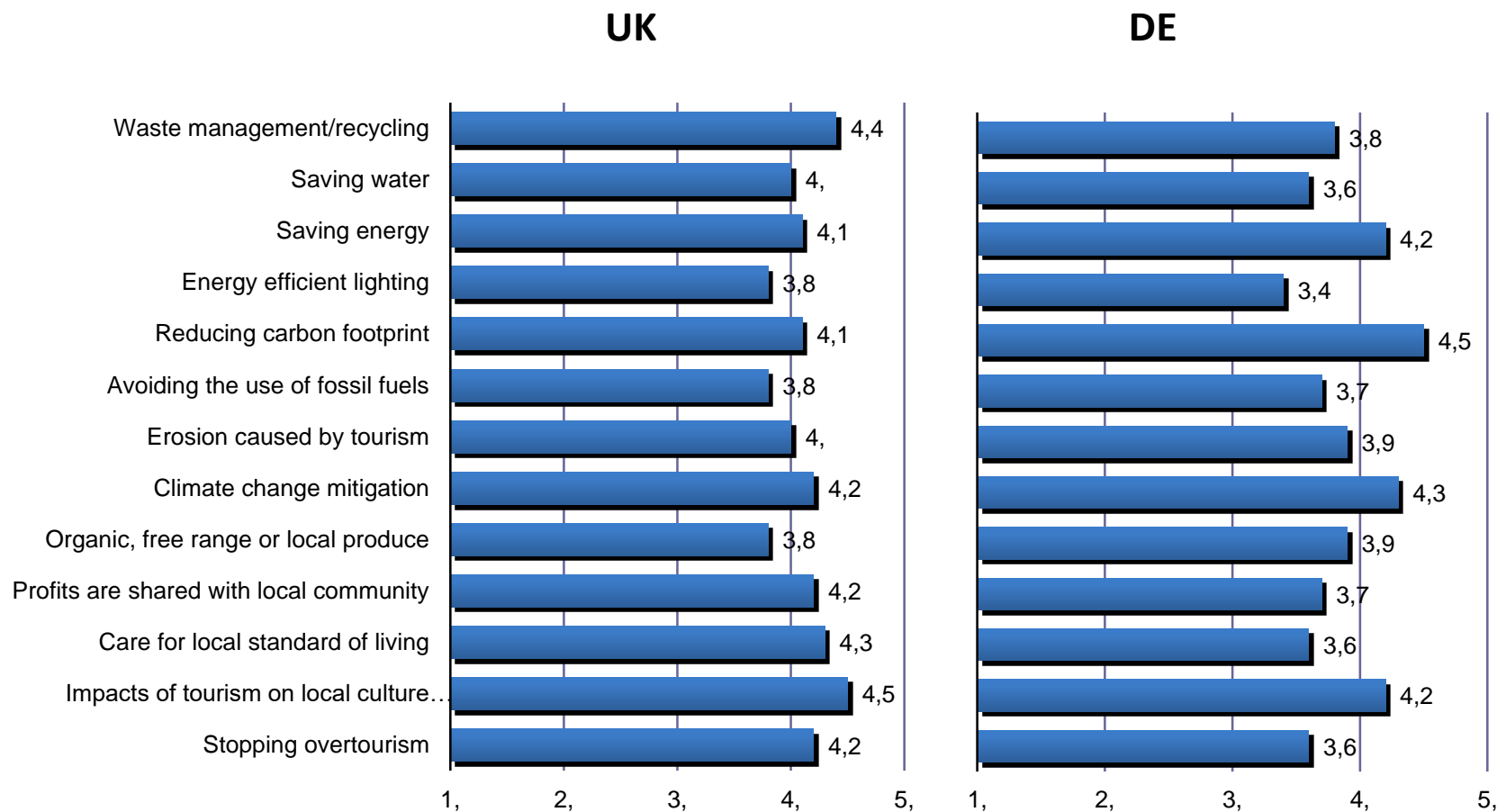
UK



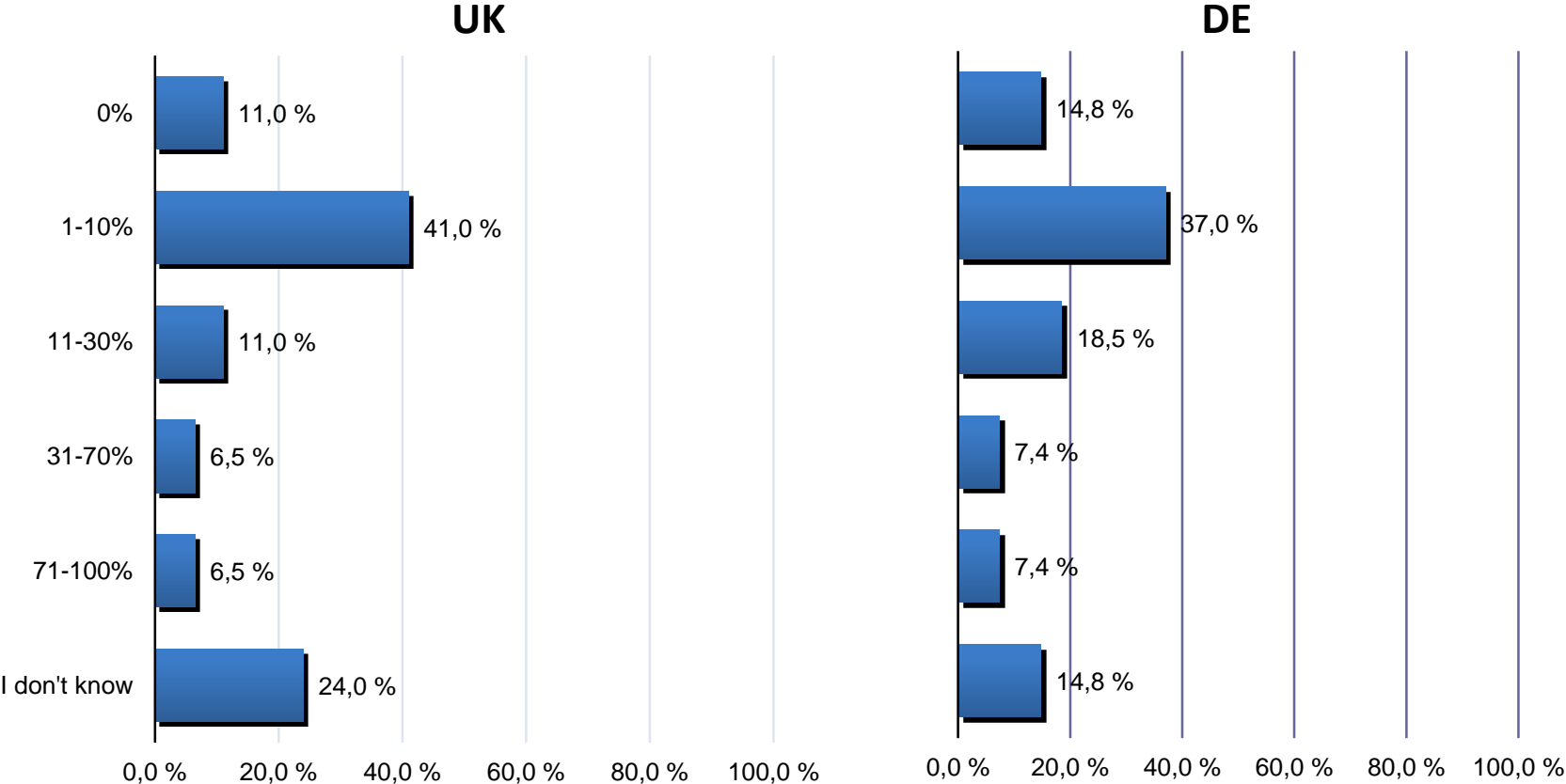
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Which aspects of sustainability rank highest in your opinion?



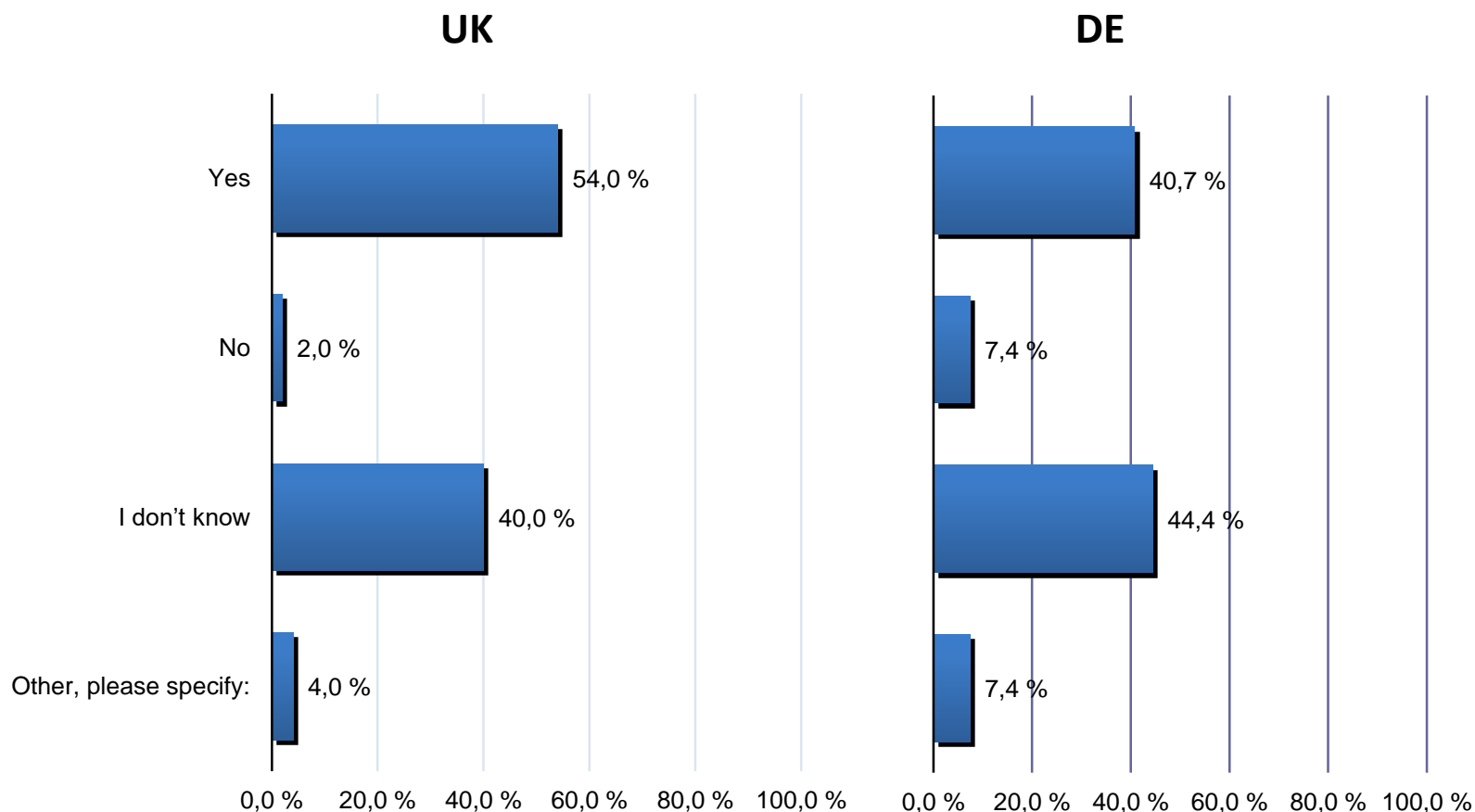
What was Finland's estimated share among your bookings in 2017?



*This question has 46 UK respondents



Is Finland viewed as a sustainable destination?

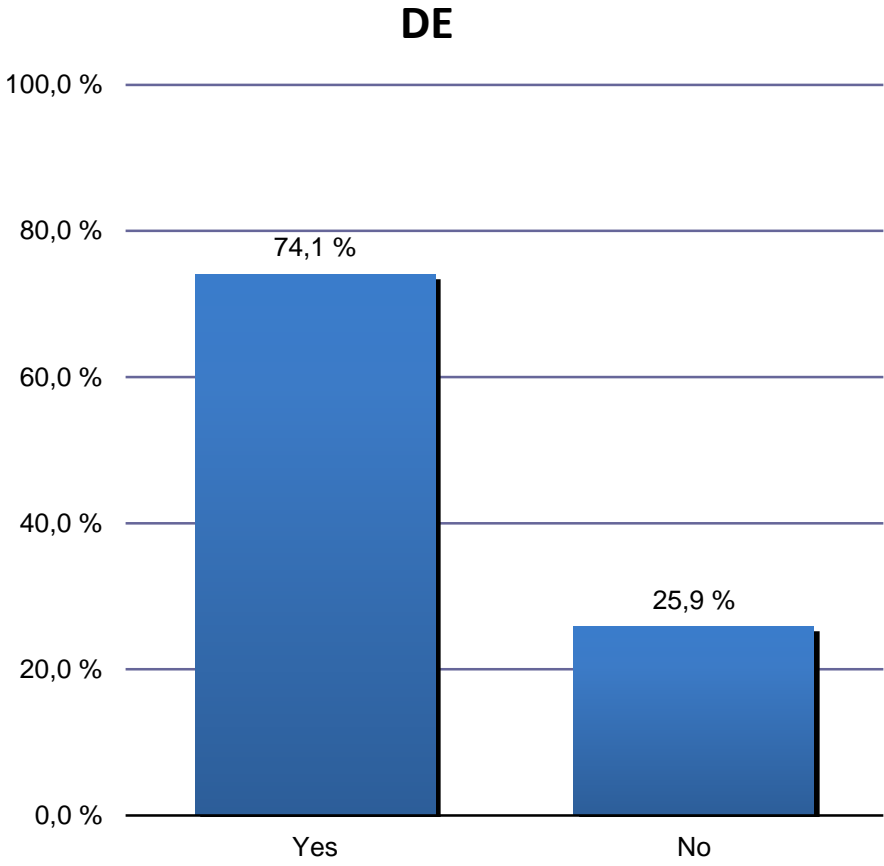
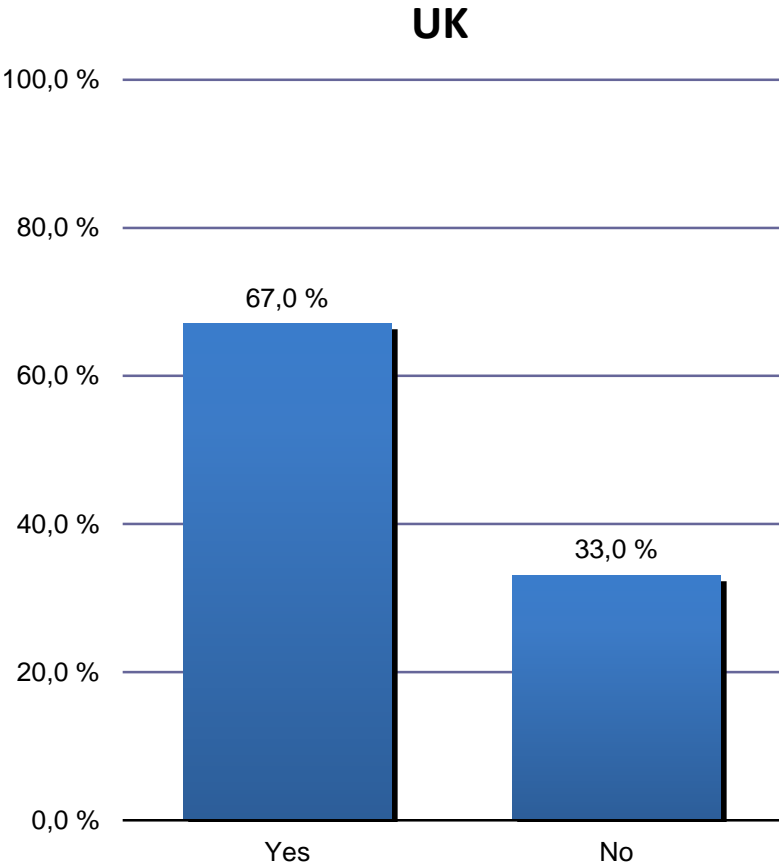


Based on your experience, is Finland viewed as a sustainable destination?

Yes, although there are seasonal products which do not qualify

German operator

Would an increase in more sustainable products make Finland more sellable for you?



*This question has 46 UK respondents



Comments from the UK operators

training tools are always welcome.

concern about mass tourism's impact on certain places and practices in Finland - e.g dogsledding, erosion of culture to suit tourists.

Based on feedback our clients are not strongly influenced by the fact that we offer carbon neutral holidays so we are increasing awareness through our marketing etc. to try to increase the awareness.

Due to the climate and seasons, Finland may be limited as to local, sustainable cuisine which takes into consideration modern diets and life-style eating preferences (vegan, vegetarian, diabetic, gluten-free, allergen free etc.). What is also important is to preserve the impression of pristine and unspoiled nature as much as possible especially if aiming to increase tourism.

I was surprised not to see any questions about the use of animals in ground arrangements locally.

We feel very strongly that those operating in Lapland should be using local suppliers, local facilities and should know the people and the area and re-invest. Hiding behind statements written in uk offices by marketing people, does nothing to help the Lappish community.

Comments from the UK operators

One of the main issues with responsible travel in Finland is the Snowmobile. It's great fun, and everyone wants to use them, but it ruins or green credentials to be promoting noisy, polluting, snowmobile journeys across the pristine Arctic snow !!

The advent of electric vehicles may change this.

Just need more knowledge

For us the main issues are educating people that Snowmobiles are part of life in Lapland and not a leisure, petrolhead activity. Also, that local cultures are being protected and encouraged to be passed through generations.

Comments from the UK operators

I would like to understand the areas which are facing issues in which we can generate awareness of in order to help. Or if we continue as we are - which areas will be affected? Who or what companies are innovating and coming up with ideas to help us lead a more sustainable future? Wildlife conservation initiatives and volunteering projects for travellers to get involved in.

The key is always more tour operators selling more responsible holidays. They know the market opportunities better than anyone else so encouraging more responsible travel entrepreneurs to set up travel companies would be good. Tax breaks for environmentally friendly accommodation and activities might also help. Lastly we focus on locally owned accommodation so encouraging this where ever possible is a good thing.

Comments from the UK operators

I feel you have two very distinct types of travellers to Finland depending on the season. By default, I feel that those travelling in the summer are looking for that 'natural' experience and are perhaps already attracted to the destination due to the unspoilt nature that you can find. Those travelling in winter (with us) would expect us to ensure that our suppliers treat animals ethically, that suppliers are environmentally friendly as possible and that they are taking part in as authentic experiences as possible. We would soon get feedback if they thought that we were promoting overtly commercial activities. But a case in mind is that we haven't had anyone specifically asking for electric snowmobiles....

We advertise sustainable tourism through our content rather than specifically shouting about it. This means we may describe a resort or hotel as sustainable but we don't currently use this as a main USP to sell our products. Finland is considered a break into nature and away from technology which could help with this image.

Comments from the German operators

Customers rarely actively ask for sustainable travel and products, but sustainable accommodation and meals often get better marks in the evaluation of the trips. We are less convinced of certificates, however the taste and quality must be right! I don't believe that we get (many) additional guests through sustainable products, but I do believe that the travel experience will be better and that customers will be happy to come back. And repeat customers are good customers!

Hotels waste too much water for the daily exchange of towels, too much disposable crockery is used and too many things are packed in plastic. Plastic bags should be forbidden or made so expensive that nobody takes them with them.

I am not sure there is a strong enough market for sustainable products. By this I mean I believe sustainability is THE most important thing we can aim for, and ensure our products are, but I think it is more effective when the operator makes the choices i.e. if you are going to promote a product as sustainable, what does this say about your other products?! It isn't what you say, it's what you do...

Comments from the German operators

A clear and honest concept for sustainable travel in Finland can furnish new customer groups that previously did not focus on Finland as a travel destination.

Keep up the good work!

There is a lot of talk about sustainability, but for most customers sustainability has no meaning in the travel decision. There are other more important arguments.

Take care of your nature: Once destroyed, it is irretrievable!



Comments from the German operators

Finland is unfortunately still extremely expensive. I am looking for sustainable products that our guests can afford.

Is there a list of sustainable accommodations in Finland?

There are only few offers in the area of non-motorised travel / slow travel, such as bicycle tours or hiking trips, although there is definitely demand for them.

You are going to the right direction, keep it up!

Comments from the German operators

For most German customers, sustainability is currently not a criteria when deciding to travel. The purchase decision is mainly made according to other factors: The decision is made on the basis of the following factors: the price/performance ratio, the fulfilment of personal travel requirements (route, destinations, group size...) as well as the travel date. Sustainability is perceived more as a bonus.

Destination certification has to happen more (see Norway); be aware of mass tourism in Lapland (infrastructure planning, nature); don't destroy "the vastness and the silence"; do offer workshops for activity providers, so that the offered experiences will also increase customer satisfaction (see Innovation Norway).

Additional interviews

Additional UK and German interviews

UK operator

Create a framework that encourages responsible tourism businesses to set up and flourish. Which might mean something like favourable taxation for their first few years.

The highest goal should be the preservation of nature

German operator

Waste avoidance (no disposable crockery, plastic bottles, individually packaged jams, etc. observation of wild animals exclusively in the wild trekking routes of at least 3 days

Additional interviews

UK operator

providers to be pro-actively coming forward with their sustainability efforts - just as an informal part of their product update. It's good for us to know internally PR or marketing round-up, social media or to help when we list product on referral sites such as Responsible Travel. There's often great things happening that they don't shout about and we find out by visiting. The Finnish Tourism industry could encourage providers to be forthcoming with this information when speaking to the trade.

The big issues at the moment are plastic and waste.'plastic-free' trips altogether which clients will demand more of.

Wildlife watching is something that clients are looking to do in Finland and we are looking for ways this can be done in a sustainable way. For example how are wolf numbers being controlled - what is the reality on the ground? hear more wildlife-oriented news stories about wildlife protection, and how tourism can support wildlife.

cycling holidays encourage travellers to cycle - bike hire incentives, better paths/routes, luggage transfers - reducing costs

Additional interviews

UK operator

**Decrease our use of plastic. Refillable water bottle sites in hotels and at tourist attractions.
Eliminating plastic straws in restaurants and hotels staggering arrivals at major tourism sites.**

UK operator

Finland (Basecamp Oulanka) is a great example of sustainable accommodation. Risk of over tourism 'mass tourism' style approach, and a loss of authenticity of local products gear up to this, i.e big 50 seater coaches bringing people for day trips smaller family run operations.

Additional interviews

UK operator

Possibly accrediting resorts with sustainability marks, for example provision of recycling facilities, use of sustainable energy, reuse of water etc. A simple sliding scale based on pre-set criteria.

Preservation of the Wilderness Northern lights, more light pollution from overdevelopment will provide a diminished experience

Promotion of job creation to support the local economy – alternative activities to support local communities. snowmobiling – enjoyed by 1000's of tourists but not great for emissions = potentially moving to electric snowmobiles?

More access to sustainability information in each area for tourists and agents. Communication of this and supporting agents efforts encouraging tourists to be responsible in the wilderness.

***NOTE: from Planet Egan. A Canadian company called Taige Motors have developed the first electric snowmobile, the TS2. Finnish BRP has built two prototypes too, one with range of 100km. The Barents Observer is a good source for news from Barents Sea / Arctic areas.**

Additional interviews

German operator

- Better bookability VR
- Easy bicycle transport VR

This would allow us to create better products with the use of public transport.

An eco-label for the tourism industry could be helpful, but often such labels are only greenwashing. Nevertheless, they can help on the way because they give the customer orientation.

Air traffic is harmful to the environment, prefer ferries rather offer rail travel than car travel, but to reach interesting destinations with public transport in Finland is a real challenge opening hours of museums, early end of season, signs in Finnish only, etc... First these things have to be tackled, then we can also talk about sustainable travel.

Järvisydän or Saija Lodge, to name two positive examples of hotels:

Beautiful hotels in good locations at a reasonable purchase price are enough for me.

Conclusions - online survey and market interviews with UK and German operators

Tour operators, especially in UK are actively looking to increase their sustainability portfolio

It is clear that consumers still worry about paying more for a sustainable vacation

Acts of suppliers more important to operators than a certification

Overall, the perception is positive, but Finland needs a stronger identity as a destination - and as a sustainable destination

Norway leads the way as a sustainable destination

More information is needed on animal welfare and wildlife in Finland

German operators worry about the climate change - there is definite need for increased offer of carbon footprint offsetting



Conclusions - online survey and market interviews with UK and German operators

Both markets have a need for more accessible information and education on Finland and responsible/ sustainable products on offer

Need for more information on Hiking and Bicycle tours

It is difficult to find sustainable accommodations in Finland

Use of public transport still tricky for tourists to navigate

Lack of awareness of Finland as a Travel destination

Both markets have confirmed that increasing sustainable offerings will increase sales of Finland

The German market has larger amount of small tour operators with an active interest of increasing their responsible/ sustainable product portfolio

Travellers expect sustainability - the requests for the industry originate from the operators



Global Thought Leader interviews

The aim was to establish the overall perception of Finland and whether Finland is viewed as a sustainable destination.

Furthermore we wanted to pinpoint key sustainability labels and certifications and find out which countries and sustainability practices are “top of mind” to these seasoned leaders.

The interview questions were built in co-operation between Visit Finland and Planet Egan Ltd in July 2018

Interviews were conducted and analysed during September 2018 by Planet Egan Ltd

Respondents were 28 carefully selected Global Thought Leaders in the field of Travel and Tourism.



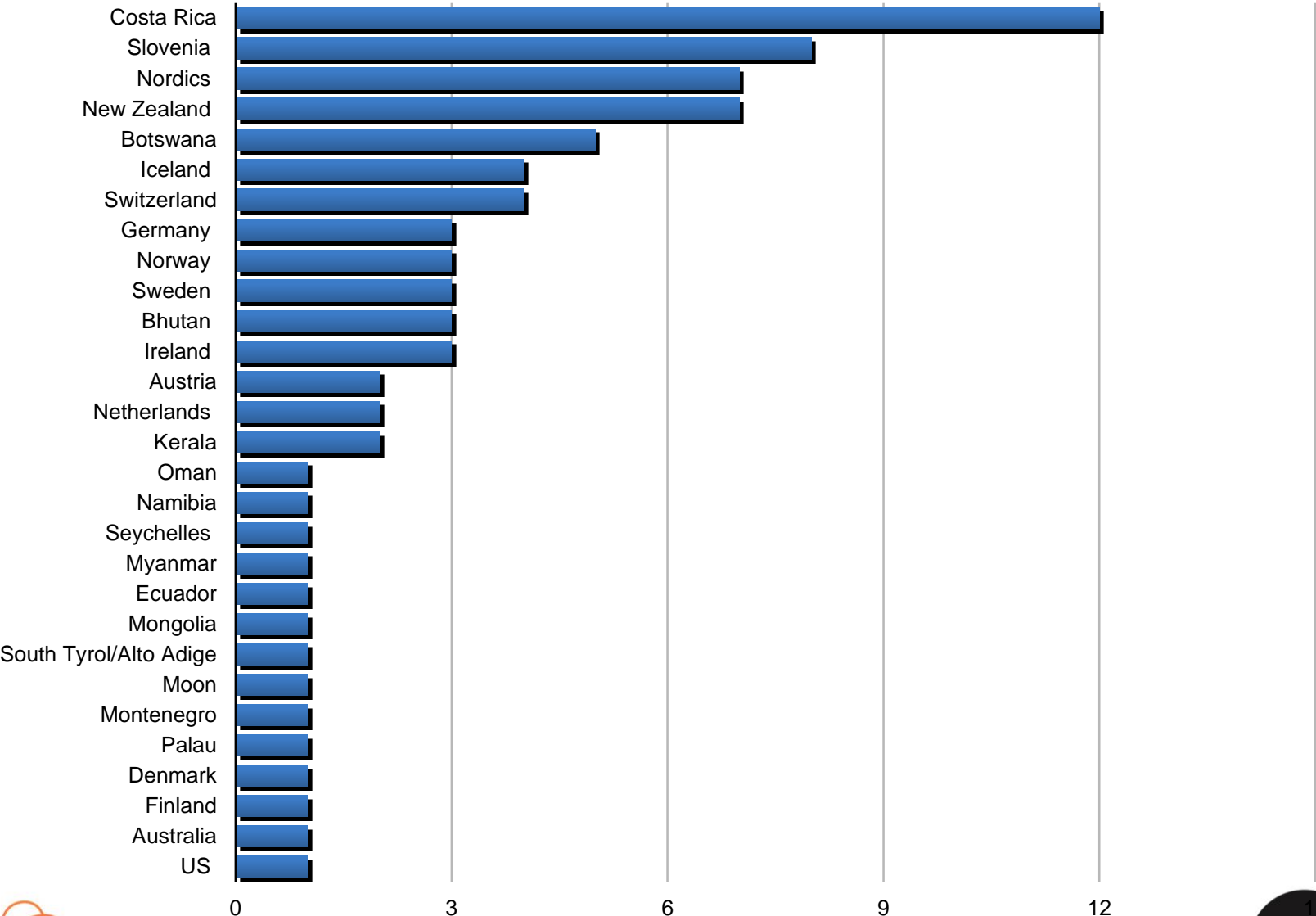
Global Thought Leader interviewees included:



Overwhelming majority (99%)

**Travellers perceive that sustainability
has an extra cost!**

Most Sustainable Countries - Top of Mind



Does your organisation use a specific accreditation / certification system/s to indicate your sustainability:

20 of the organisations do not have their own sustainability system, whilst seven stated that they do have a system in place.

EarthCheck came up twice, as did ISO50001 and Travelife - others that were named are: GSTC, Scholars of Sustenance, Green Fins, Reef-World, Tourcert and Sustainanalytics





Visit Finland

The most recognised and respected labels

Arctic Sustainable Destination – UK and German market surveys



Based on your experience, is Finland viewed as a sustainable destination?

79.5% say “YES!”

17% say “I don’t know”

3.5% say “it has potential”

Conclusions Global Thought Leader Interviews

Finland is generally perceived as a sustainable destination, most known for its pristine nature and wilderness

Most important for consumers are waste management, CO2 offsetting, reducing use of plastic, local people, local food, no pollution and preservation of nature

Certification systems/standards ISO 50001, Earth Check, Travelife and GSTC are the most commonly sought

Costa Rica, Slovenia, The Nordics and New Zealand are ranked highest when thinking of sustainable destinations

Finland needs more promotion to set itself apart from its Nordic neighbours

There are still many misconceptions of Finland e.g. Whale hunting, Fjords

More education and information must be made readily available



Appendix



Links to various sustainability/responsibility initiatives, awards & programmes

<https://www.scottdunn.com/about/why-scott-dunn/our-philosophy>

<https://www.exodus.co.uk/responsible-travel>

<https://www.treadright.org/>

<https://www.tracoin.com/>

<https://ttc.com/responsibility-2/>

<https://www.contiki.com/uk/en/about/contiki-cares>

www.justadrop.org

<https://www.wttc.org/tourism-for-tomorrow-awards/>

<https://visitworldheritage.com/en/eu>

<https://www.theaurorazone.com/about-us/responsible-travel>

<https://www.tuigroup.com/en-en/sustainability/strategy>

<https://www.kuoni.co.uk/responsible-travel>

Links to non-prompted eco labels / certification systems

<https://www.carbonfootprint.com/>

<https://www.allhandsandhearts.org>

<https://www.metowe.com>

<https://www.exodus.co.uk/responsible-travel/responsible-travel-policy>

<https://www.responsibletravel.com/copy/the-responsible-travel-criteria-we-use>