



City of
Gothenburg

The City of Gothenburg's destination development programme

A sustainable destination by 2030



For a growing and healthy destination

Tourism and the visitor industry – concepts and conditions

Tourism and the visitor industry are two concepts that are often conflated. This can be explained by the fact that tourism is more clearly defined, while the visitor industry is considerably harder to define and delimit. The UN's World Tourism Organization (UNWTO) defines tourism as people's activities when they travel to and stay in places outside their usual environment, for less than a year. Such a stay aims for leisure, business, or other purposes¹.

The visitor industry has no single accepted definition. Different organizations and destinations choose to express themselves in slightly different ways. In other words, defining the visitor industry is difficult, but there are clear differences compared to the concept of tourism. The visitor industry is generally defined based not on who the customer is or where the customer comes from, but on what the customer is offered – in other words, what is experienced. The ecosystem of the visitor industry includes different experiences and the infrastructure that enables people to participate in these experiences, such as trains, public transport, hotels, stadiums, and other facilities. There are also suppliers and event organizers that package these experiences and develop booking systems that make it easy for consumers to participate in their offerings. Within this ecosystem, everyone is important for the whole. Another difference between the concepts is that residents are an important target group for the visitor industry since they participate and contribute to the ecosystem, just as tourists do. The visitor industry is part of the increasingly common and somewhat broader concept known as the experience industry. This includes many industries that contribute in different ways to creating and arranging experiences, where the experience acts as a reinforcing part of – or for – a product or a brand².

Tourism and the visitor industry both create and contribute to positive values for society and individuals, in the form of employment, local and regional development, meetings, experiences and quality of life. The idea is that the visitor industry brings added value for visitors as well as residents, as they both take part in the experiences the destination is offering. A place with opportunities for a rich future while also having plenty of added values and experiences is what makes the place interesting to visit, study, work or settle in. A healthy, broad offering of cultural and entertainment activities, commerce, and restaurants enhances the quality of life for residents while also boosting the region's attractiveness. A sharper focus on nearby markets means more attention is paid to residents' perspectives and needs when developing the visitor industry's offerings.

Creating an attractive destination contributes to open and sustainable societal development. A destination's development relies on good cooperation between public, private, voluntary, and academic sectors. A destination's sustainability approach is dependent on the city's approach to sustainability regarding basic services, infrastructure, and other sustainable initiatives. Successful cooperation between the municipality's operation and the visitor industry's various actors is a requirement for - and contributes to - a sustainable destination by 2030

¹ UNWTO www.unwto.org

² Ola Bergström, *Vägar till hållbar tillväxt – En förstudie om framtidens upplevelseindustri i Västsverige [Routes to sustainable growth – A pilot study of the experience industry of the future in western Sweden]* (2021)

Gothenburg: A destination under development

Gothenburg as a destination consists of all 13 municipalities in the Gothenburg region. The destination's visitor industry has grown stable for several decades, leveraging the municipalities development within sustainability, education, employment, business development, cultural life, integration, and international relations. Gothenburg intends to continue its growth as a destination, evolving a vibrant offering of culture, entertainment, and leisure activities which increases value for visitors, business owners, and residents. The 13 municipalities' combined offerings complement each other and also strengthen the attractiveness of the entire destination.



Before the coronavirus pandemic, the visitor industry in Gothenburg grew steadily for many years. The proportion of international guest nights was stable with approximately 30 % of the total guest nights, while business travel accounted for around half of overnight stays³. The primary targeted markets are found in surrounding regions, i.e., Sweden, Norway, and Denmark. Other targeted markets include Germany and the United Kingdom.

The City of Gothenburg's control over the visitor industry in Gothenburg

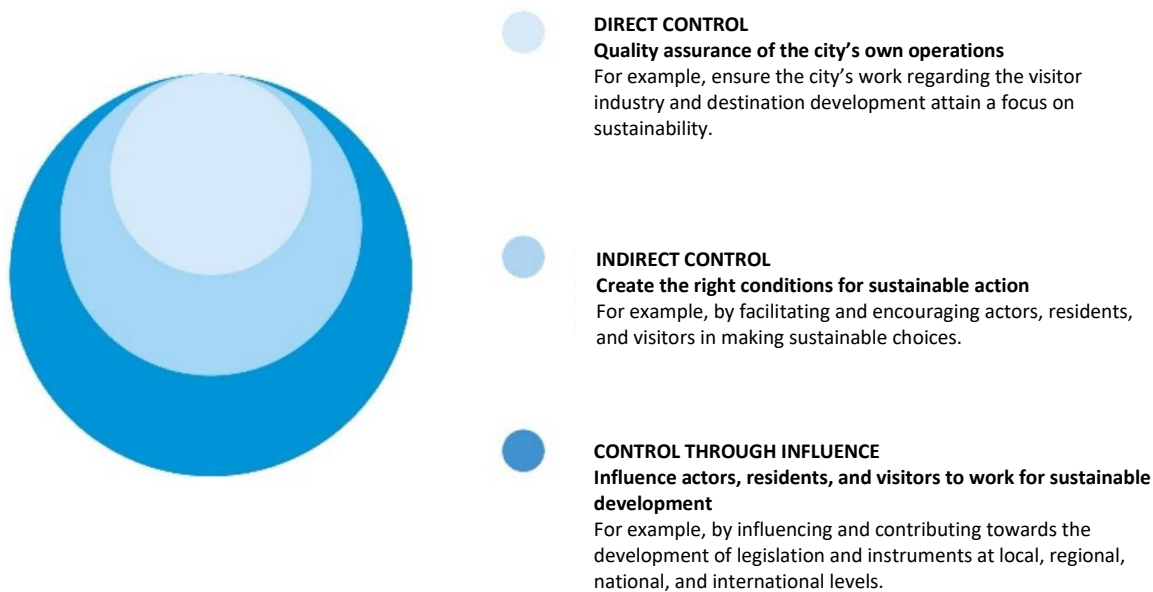
This programme supports the destination's development, aiming towards strong and sustainable growth between now and 2030. The development of the destination requires close cooperation between public sector operations at both municipal and regional levels and between industry, voluntary organisations, academia, and residents. Cross-sector cooperation in the best interest of the entire Gothenburg region has been part of Gothenburg's successful growth of the visitor industry. The City of Gothenburg controls parts of the destination's visitor industry to differing extents.

The conditions for developing the destination and the tourism industry are dependent on many of the city's boards. Influence and contribution from the city of Gothenburg vary and encompass more aspects than those addressed in this program's strategies. Some of the tourism industry's key issues are governed by other of the city's programs, such as the City of Gothenburg Culture programme. Actors in the cultural sector produce and create much of the city's offerings. A vibrant cultural scene enhances the appeal of the destination for visitors, residents, and

³ SCB, *Inkvarteringsstatistik [Accommodation statistics]*.

businesses. Gothenburg & Co is named as a partner in the Culture programme as several target groups align. Therefore, Gothenburg & Co's involvement carries the responsibility of bolstering the destination and tourism industry while addressing their requirements and desires.

The city possesses resources that contribute towards the visitor industry, carrying out business activities under the city's management and guiding processes that develop society. The city contributes to creative and innovative solutions. All actors are thus part of a whole that constitutes the destination's attractiveness.



To increase participation and expand knowledge about how the city can impact the destination's sustainable development, the city committees and boards need to cooperate actively both with each other, as well as relevant actors in connection to industry issues and challenges. The cooperation needs to take place not only in day-to-day activities but also on a long-term strategic level. It encompasses the entire destination, in other words, all 13 municipalities in the Gothenburg region, the foundation of cooperation is based on values such as innovation, experimentation and transition.

The visitor industry's challenges and opportunities

Within the global economy, the visitor industry is a foundational industry for cities, regions, and nations. The view of the visitor industry has changed, as the industry has an increasingly clear role to play in societal development and contributing to growth. The opportunities can mainly be found in metropolitan regions which, due to their size, have the right conditions in the form of infrastructure, accessibility, and the range of products and services required in competition⁴. Just like other industries, the visitor industry needs to adapt in line with trends and external factors that influence the needs and behaviours of consumers. These changes affect the visitor industry's underlying structures, furthermore, bringing new challenges and

⁴ UNWTO www.unwto.org

opportunities for its entire ecosystem. Developing new reasons for travel while also adapting to industry trends and changes are key issues for the destination when it comes to maintaining its status as an attractive travel option all year round.

The global outbreak of the Covid-19 pandemic in 2020 had evident and serious effects on the visitor industry worldwide. Previously seen phenomena such as staycations, e-commerce and the development of digital experiences and meetings have advanced. The pandemic has caused far-reaching economic effects for actors in the tourism industry, where many companies have relied on support measures to avoid bankruptcy and have had to lay off personnel, resulting in a loss of expertise. This loss of experience has negative effects on service levels and customer interaction, thus being a significant factor influencing customers' and visitors' experiences. This, in turn, affects the destination's attractiveness.

Competence provision is one of the major challenges both short and long-term. The tourism industry is a diverse job creator that attracts people with various experiences, backgrounds, and education. The tourism industry is traditionally seen as an entry-level industry, suitable for individuals taking their first job or those who are somewhat removed from the job market. An effect of the COVID-19 pandemic is that the tourism industry is facing significant issues such as a shortage of personnel and skills, the need for training, skill development, and improved working conditions in the industry. Competence provision is a strategic theme in the City of Gothenburg Business Development Programme and the programme's action plans.

This entails several challenges related to recruitment and language, and the industry is not considered a long-term employer with career opportunities. The industry's approach to addressing these challenges can involve new solutions and changes in management and workforce planning, such as having chefs take on more of a managerial role while employing less qualified staff for simpler cooking tasks. Several actors have also initiated their own training programs to attract and build a workforce based on their specific needs. The industry also recognizes the need to strengthen its reputation as an attractive employer. Improving companies as better, more secure employers, enhancing conditions and labour rights, which showcases the industry's many career opportunities that are long-term and challenging key issues for the future of the tourism industry.

The 2020s are expected to be characterised by economic instability that can impact the industry's ability to invest in innovation and skill development. The unrest that broke out in Europe in the spring of 2022 and the resulting economic fluctuations also contribute to increased uncertainty regarding both the industry's and households' financial situation.

Sustainable destination development

When it comes to tourism and the visitor industry, there are several general and inherent conflicts of interest to consider. Tourism is associated with activities linked to travel, which place a strain on the environment, for example through carbon dioxide emissions from transport which use fossil fuels. The challenge in transitioning to a fossil-free transport sector applies to all of society – locally, regionally, nationally, and globally – while being incredibly important for the entire tourism and visitor industry. All forms of transport are needed and meet different

requirements, and all forms of transport need to approach zero emissions. This is also noted in the national strategy for sustainable tourism and a growing visitor industry⁵.

Cooperation and efforts at the system level are essential in tackling this major challenge. Other key factors for sustainable tourism development include attractive, easily accessible means of sustainable transport and for visitors to choose these options. Another potential conflict of interest involves residents' perspectives and needs concerning the visitor's perspective. This can involve overcrowding and overtourism, which leads to social tensions, depletion and littering of vulnerable locations. It can also involve concerns how public land and places are used and exploited. Continuously listening to residents' experiences of the tourism and visitor industries' consequences and involving residents. Increasing citizens participation in the development of places and destinations is essential to prevent dismay among residents. By clearly defining the local and regional population as an important target group for the visitor industry, the destination and the industry's actors can grow and develop in a manner that prevents or minimizes the negative consequences of these conflicts of interest.

A sustainable approach to destination development restores value to the destination and its residents. The City of Gothenburg's efforts towards sustainable development and Agenda 2030 are based on active participation from the private and public sectors, to jointly achieve the local and global goals linked to the three dimensions of sustainability: social, economic, and environmental.

People's growing awareness of their consumption's pressure on the environment and the climate may lead to fewer long-distance journeys, strengthening the opportunities for increased consumption of nearby experiences. The awareness of consumption pressure leads to consumers placing greater expectations on sustainable alternatives, for example regarding accommodation, transport, and sustainable experiences, seen from all three dimensions of sustainability.

The sharing economy

Experiences and services make up a growing proportion of households' consumption. The desire to make more optimal use of assets drives developments within the sharing economy. Useful examples are seen throughout the visitor industry, for instance, user-friendly digital platforms for booking private accommodation, transport, experiences etc. This involves a certain degree of increased competition for the destination's commercial actors, with redistribution of income going to actors who provide these services. At the same time, it means increased capacity for the destination as a whole in the peak season and during major events when hotels, for example, are often fully booked. It also means that the industry's actors have the opportunity to attract more visitors, including more price-sensitive visitors.

Digitalisation

Consumers have high expectations when it comes to individual actors' and destinations' digital presence and service. For instance, after their booking customers receive real-time information about queues at tourist attractions, available parking space and up-to-date information, such as suggestions on all-weather activities or current events. The rapid development of digital methods and tools – combined with restrictions during the pandemic – has led to a reduction in business travel worldwide.

⁵The Swedish Ministry of Enterprise. *Strategi för hållbar turism och växande besöksnäring [Strategy for sustainable tourism and a growing visitor industry] (2021)*

There is great uncertainty about whether business travel will recover.

For the industry's actors, this involves a greater ability to offer digital solutions as a complement to physical solutions, requiring new partnerships and skills development. New technical solutions allowing interactive hybrid experiences are expected to be constantly introduced to the market. The hybrid format involves live events with participants attending both physically on-site and digitally while having the opportunity to interact wherever they are⁶

At the same time, it is important to see this trend, not only as a threat to the physical visitor industry but as an opportunity for reaching more target groups and identifying new sources of income. It is hard to predict the extent to which hybrid and digital experiences will compete with physical events and meetings. Moreover, the industry should be aware of the shift in power away from traditional event and meeting organisers towards digital platforms which provide and disseminate experiences.

New target groups, reasons to travel and behaviours

During the outbreak of COVID-19 in 2020, visitors were noted as more aware of infection risks and stricter demands in health and hygiene connected to travel and participation in events. A behaviour change was noted, as many people became used to planning with short notice; this affects advance notice when booking and has increased expectations for generous cancellation conditions from industry actors.

More people have opened their eyes to staycations and holidays in the surrounding region, which is expected to affect the mix of visitors coming to the destination in the future. Interest in and the variety of nature-based experiences have increased significantly, and destinations – especially metropolitan regions – therefore need to broaden their offering, both in the form of packaging and through communication.

The trend of lessened business travel will require sharper focus on the private sector for the destination as a whole, particularly for those actors who were previously dependent on business travellers, such as hotels. The competition is growing, and it is becoming increasingly important to position oneself and develop offerings and services that appeal to target groups. An expanded offering of reasons to travel is also needed to attract private travellers outside established holiday seasons.

Agenda 2030 and the destination's development

The UN's Sustainable Development Goals represent a significant joint framework for achieving a society that is sustainable in the long term, at both global and local levels. The three dimensions of sustainability – social, economic, and environmental – are integrated into the 17 goals that make up Agenda 2030. These goals are both dependent and directly linked to each other in various ways. They can affect, reinforce, or come into conflict with each other.

The destination's development based on the programme's objectives and strategies involves positive effects as well as increased pressure on the community and the environment. The programme's starting point is to have the greatest possible positive effect while also contributing towards reducing the negative effects. The implementation of the City of Gothenburg's destination development programme towards 2030 will

⁶ Göteborg & Co, *Hybridupplevelser för evenemang och möten [Hybrid experiences for events and meetings]*

address both perspectives and intends to contribute – both directly and indirectly – towards the fulfilment of Agenda 2030.

Cooperation is an important starting point for the Sustainable Development Goals. The city’s ability to steer development itself is limited in many cases. The destination’s development is based on actors pulling in the same direction. The right conditions for exerting a higher degree of influence are thereby created, which also ensures a greater ability to contribute towards fulfilling the goals of Agenda 2030 while achieving the programme’s objective for Gothenburg to be a sustainable destination by 2030. In particular, the programme’s goals and strategies contribute towards the following goals:



The programme contributes indirectly towards another five goals. Just like the above goals, these goals are critical for the implementation of the programme. However, the main contribution takes place through – and in cooperation with – other programmes and plans within the city.



Objectives, goals and strategies for a sustainable destination

The internationally accepted definition of sustainable development⁷ defines the starting point as being that sustainable development must satisfy today's needs without jeopardising future generations' opportunities to satisfy their needs. A balance between the social, environmental, and economic dimensions should be striven for. Working with sustainable destination development is necessary to strengthen the destination in the long term. The COVID-19 pandemic has further clarified the importance of destinations combining long-term strategies with flexibility to meet the visitor industry's challenges and opportunities successfully.

Gothenburg is a sustainable city that is open to the world. Gothenburg intends to be a welcoming and inclusive destination, where everyone should feel safe and respected. The visitor industry is dependent on residents' well-being, acceptance, healthy living environment and nature's services. The effort involving sustainable destination development aims to provide the right conditions for many different types of economically stable operations while also contributing towards growth. Existing actors should be able to see opportunities, new establishments should be welcomed, and innovations are to be encouraged. Both physical and digital actors are important for the future of the visitor industry.

Internationally, Gothenburg is a role model within sustainable destination development. For example, Gothenburg has been ranked the world's most sustainable destination in the Global Destinations Sustainability Index (GDSI) for six years running (2016–2019⁸, 2021, 2022). In 2021, Lonely Planet named Gothenburg as the world's Best Sustainable City Stay. This leading position faces tough competition from several other destinations, particularly in Europe. Cities such as Copenhagen, Zurich, Glasgow, and Sydney have stated high ambitions and challenge Gothenburg. The GDSI is based on the following description of a sustainable destination:

“Sustainable Destinations are places that actively account for the current and future economic, social, and environmental impacts of their events and tourism industry, while engaging and listening to the needs of the host communities, the environment, visitors and the industry. They have collaboratively developed a long-term and regenerative vision and take the lead as stewards and catalysts in making a better place to visit, meet, and thrive in”⁹

This programme's objectives and strategies intend to contribute with a long-term perspective on Gothenburg's development, moreover, strengthening Gothenburg's position within sustainable destination development.

⁷ The UN. [The Brundtland Report](#). 1987

⁸ [Global Destination Sustainability Award](#). Due to the pandemic, no official benchmarking was carried out in 2020.

⁹ GDSI The Global Destination Sustainability Movement (gds.earth)

The programme's objectives: A sustainable destination by 2030

Against a backdrop with many years of success, as well as new knowledge and insights, overall objectives have been formulated for Gothenburg. These objectives involve the visitor industry growing while also contributing towards the development of people and living environments.

The programme's objectives have three main focuses, which have been formulated based on – and consider – the three dimensions of sustainability: social, economic, and environmental. For Gothenburg as a destination, this is signified through:

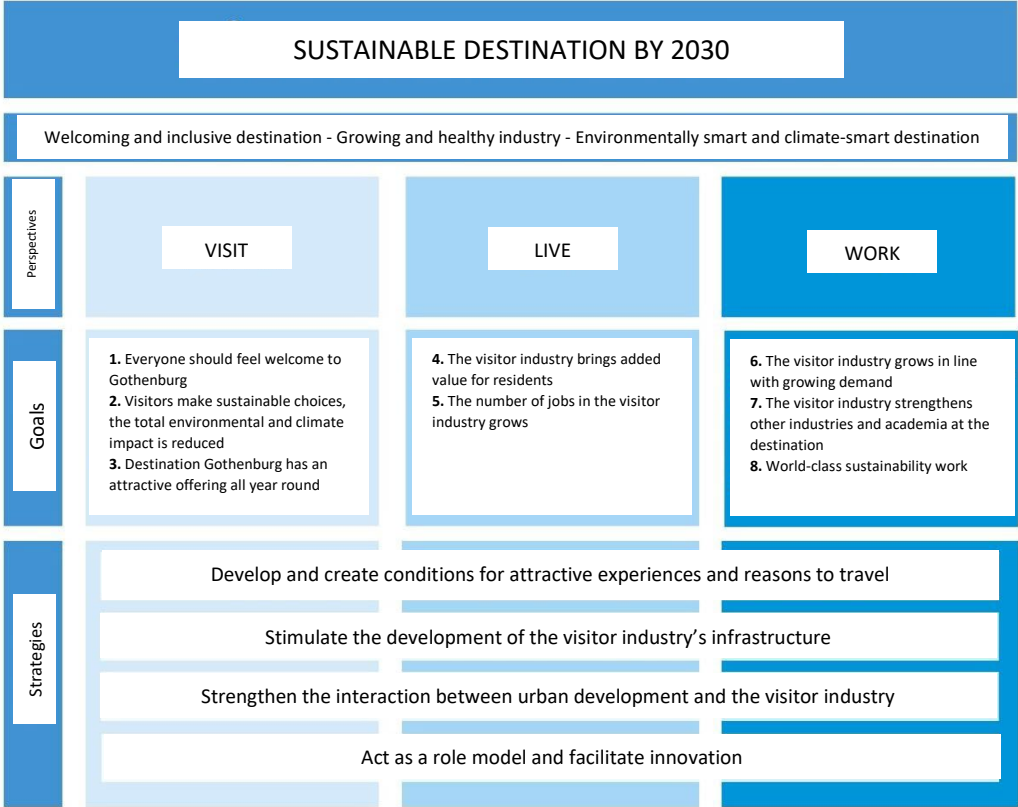
- A **welcoming and inclusive destination** that offers something for everyone, and where everyone is treated with respect (the social dimension).
- A **growing and healthy industry** that creates employment as a consequence of increased demand (the economic dimension).
- An **environmentally smart and climate-smart destination** with a climate impact that is close to zero, where the industry's actors and visitors contribute towards an environmentally sustainable destination (the environmental dimension).

These main areas of focus are divided according to three perspectives: visit, live and work.

Visit	A visitor can come from the city or the surrounding region or may have come here as a tourist.
Live	A resident lives in one of the 13 municipalities. This perspective also includes the destination's attractiveness as a place in which to live and study.
Work	Relates to industry, culture, and associations, as well as public sector actors at the destination, working both in and beyond the visitor industry.

Within each perspective, objectives are packaged into measurable goals in which the three sustainability dimensions are considered. Each goal has indicators, in which the current situation and target values are presented. As well as objectives and goals, the programme also includes four cross-sectoral strategies. The function within the strategies relates to and contributes in various ways towards the three perspectives and their goals.

Summary of the programme’s perspectives, goals, and strategies



The programme’s goals and indicators

The programme’s goals and indicators are presented below, with current- and target values. The indicators relate to the entire destination, i.e., all 13 municipalities, unless otherwise stated. In several cases, the current situation for the indicators is based on 2019, which should be regarded as a normal year for the visitor industry. A reference value for 2020/2021 is shown to highlight the effect of the Coronavirus pandemic. In those cases where data has not been available, surveys have been carried out to establish a current situation. These surveys were carried out in summer/autumn of 2021.

At the time when this programme was drawn up, there was still great uncertainty about the visitor industry’s post-pandemic recovery. The starting point when setting several of the selected indicators has therefore been initiated to return to the level noted in 2019. As the rate of recovery becomes clearer, there is a plan for the evaluation and review of target values. In the event of a permanent decline in business travel and long-distance international travel, the visitor industry’s capacity for growth may be strongly dependent on increased travel from the surrounding region, the rest of Sweden and our neighbouring countries to make up for any reduction in business travel, not only during the high season, weekends, and school holidays but also on weekdays. The previously stated ambition to double the number of commercial guest nights (base year 2015) will also be reviewed regarding the visitor industry’s future conditions.

At the time of producing this programme, there are no reliable methods for measuring the climate impact on visitors and the industry, for example. International discussions are

underway to develop more common methods for measuring and evaluating the value and effects of the visitor industry's sustainable development and destinations' success. Gothenburg is taking part in efforts to develop new methods, both nationally and internationally. The intention is to evaluate and supplement the programme's indicators as new measurement methods are developed and are deemed to be reliable.

Chapter 1 of the appendix reports on the surveys and sources that form the basis for the indicators' current situation and the definitions of concepts used.

Perspective: Visit

1. Everyone should feel welcome at the destination

Gothenburg intends to be a welcoming and inclusive destination where every visitor feels safe and is treated with respect, regardless of their gender, ethnic background, sexual orientation, disability, age, declaration of faith or transgender identity/expression. Everyone should have the opportunity to move freely and to participate in the destination's broad offering of experiences, and this participation is to take place without fear of being exposed to crime or discrimination. The barriers that prevent people from taking part in the destination's multifaceted offering of experiences and services should therefore be removed. This applies both to people's physical conditions and to their economic opportunities to participate in the visitor industry's offerings. The aim is a fully accessible destination: physically, psychosocially, and socioeconomically. The City of Gothenburg's stated goals of greater equality, accessibility, gender equality, antiracism and non-discrimination contribute towards the destination becoming a more attractive and safer place to visit.

The reasons for choosing Gothenburg vary among visitors. To strengthen the destination's ability to attract new visitors and increase visitor satisfaction, it is important to offer something for all tastes and interests, regardless of who the visitor is or what their circumstances are. Continuously monitoring changes in consumption patterns in the destination, such as in the cultural sector, and analysing the results concerning insights on how the cultural scene can grow and develop, contributes to knowledge about the attractiveness, effects, and opportunities of culture for the destination.

Another perspective of safety and security is the lessons learnt during the pandemic regarding special measures to prevent the spread of infection, and it is important to include these when preparing for the future.

Indicators	Current situation	Target value
NPS visitors*	2021: 36	2025: 40 2030: 46
Visitor Index**	2021: 80	2025: 82 2030: 84

*NPS = Net Promotor Score. Measures the degree of recommendation and satisfaction within the target group. Source: Visitor survey.

**The Visitor Index is a combined measurement based on Swedish visitors' perception of safety at the destination, the attractiveness of the tourism supply, access to information and the perceived hospitality during their visit. Source: Visitor survey.

2. Visitors make sustainable choices, and the total environmental and climate impact is reduced

At a sustainable destination, it should be easy to make climate-smart choices and participate in sustainable experiences. One important parameter to consider for achieving the goal of a sustainable destination by 2030 is limiting the environmental and climate impact caused by visitors in connection with their travel and stay. It is therefore extremely important that visitors – both within Gothenburg and when travelling to and from the destination – make sustainable and climate-smart consumption choices as far as possible.

Transport to and from the destination frequently has the greatest impact on the climate in connection with a journey. This is particularly true for long-distance visitors. Persuading visitors to stay for longer at the destination rather than only encouraging new visitors to travel here is therefore an effective way to create the right conditions for growth within the industry without this automatically involving more transport to and from the destination. When visitors stay for longer at the destination, they consume more of the destination's offering and existing infrastructure is used more effectively. Another way of reducing the climate impact as a consequence of visitors' transport is to attract domestic visitors and visitors from the surrounding region to a greater extent, as they do not have to travel as far to reach Gothenburg.

Conditions should also be in place to make climate-smart consumption choices and to take part in sustainable experiences at the destination. This requires greater commitment to sustainability from the industry's actors and for sustainable alternatives to be communicated to visitors to consume more sustainably throughout their entire stay. For instance, this could involve staying at an environmentally certified hotel, eating at restaurants that serve locally produced organic food, using public transport to get around or taking part in events that actively choose to avoid single-use items. Offering sustainable consumption alternatives as a standard and communicating these to visitors contributes towards the experience of a sustainable destination.

Indicators	Current situation	Target value
Average length of stay at commercial accommodation facilities*	2019: 1.66 nights 2020: 1.66 nights 2021: 1.63 nights	2025: 1.69 nights 2030: 1.71 nights

Number of domestic guest nights at commercial accommodation facilities*	2019: 3.6 million 2020: 2.1 million 2021: 3.0 million	2025: 3.8 million*** 2030: 4.2 million***
Proportion of visitors who perceive the Gothenburg region as a sustainable destination**	2021: 57%	2025: 65% 2030: 70%

*Source: SCB Inkvarteringsstatistik [Accommodation statistics].

**Source: Visitor survey.

***Evaluated annually and revised when necessary.

3. Destination Gothenburg has an attractive offering all year round

An attractive destination needs to provide a varied offering of reasons to travel all year round, both to attract tourists to visit the destination and to meet residents' wishes for a wide range of experiences to take part in locally. For Gothenburg, it is important to increase the selection of experiences and reasons to travel at times of the year other than the summer months of June, July, and August (the high season). Arranging sporting events, concerts, art exhibitions, scientific conferences and public fairs are examples of efficient ways to drive streams of visitors to the destination, during all seasons. A rich offering of reasons to travel increases the opportunities to attract both private and business travellers to visit the destination and to persuade them to extend their visit, for example by combining different types of experiences during their stay.

Evening out visitor volumes across the entire destination, over every month of the year provides good conditions for minimising any negative effects in the form of overtourism, which are often linked to the high season. This contributes towards more even visitor numbers at tourist attractions, arenas, and accommodation facilities, for example, which creates better opportunities for good profitability for the industry's businesses. At the same time, this also has a positive impact on visitors' picture of Gothenburg, since it increases the experience of the destination always having something to offer them. Continuing to strengthen the city's offering of reasons to travel, particularly outside the traditional high season, enables more people to discover Gothenburg.

Indicators	Current situation	Target value
Number of guest nights at commercial accommodation facilities outside the high season*	2019: 3.3 million 2020: 1.7 million 2021: 2.1 million	2025: 3.3 million 2030: 3.6 million
Number of events outside the high season**	2019: 37 2020: 9	2025: 37 2030: 42
Number of meetings outside the high season**	2019: 40 2020: 5	2025: 40 2030: 45

*Source: SCB Inkvarteringsstatistik [Accommodation statistics]. Evaluated annually and revised when necessary.

**Relates to the period January to May and September to December, i.e. outside the high season months of June, July and August. For a definition of which meetings and events this relates to, see Chapter 1 of the appendix. Source: Göteborg & Co/Gothenburg Convention Bureau.

Perspective: Live

4. The visitor industry brings added value for residents

Encounters between people and their experiences of art and culture open doors to new worlds and help people build their identities. This contributes towards a sense of belonging and forms the foundation for the history and cultural heritage of the future. Sports and associations have a great significance in people’s lives, both from a health perspective and through the ability to contribute towards belonging and inclusion.

Residents account for a significant proportion of visitors to museums, restaurants, and cultural venues, for example, therefore they are important customers for businesses in the visitor industry.

Gothenburg’s most important ambassadors are the city’s residents, and the visitor industry should thus work to provide added value as well as a better quality of life for those who live at the destination. Therefore, it is important to ensure that all residents have good opportunities to participate in the visitor industry’s offerings at the destination, regardless of their stance. When residents are satisfied with the destination’s offering of experiences, they contribute towards a welcoming atmosphere for visitors and also recommend friends and acquaintances to visit Gothenburg.

Indicators	Current situation	Target value
NPS* residents	2021: 54	2025: 57 2030: 60
Proportion of residents who believe that the visitor industry’s offering adds value for them**	2021: 87%	2025: 88% 2030: 90%

**NPS = Net Promotor Score. A measurement that measures the degree of recommendation and satisfaction within the target group. Residents were asked whether they can recommend that others visit the destination. Source: A resident survey.*

***Source: A resident survey.*

5. The number of jobs in the visitor industry grows

A growing visitor industry contributes to new jobs for the region’s residents. It plays a part towards improved livelihoods, which strengthens residents’ living conditions and increases their sense of connection to society. For many people, work also forms the basis for their social life. At the same time, labour market demands have risen in line with a changing society. Education is often a requirement to acquire a job, thereby being able to support oneself. The visitor industry employs many people, in many cases giving young people and those born abroad a pathway into the labour market. For example, part-time jobs while studying gives young people additional opportunities to support themselves. For more of the region’s residents to support themselves full-time through working in the visitor, it is important with employment that spans the entire year. As the digital maturity of the visitor industry increases, new needs for skills are also expected to lead to new jobs being created outside businesses that are currently regarded as visitor

industry field. This could involve consultancy roles within IT and software development. This may lead to the need for review and supplement the following indicators during the programme period.

Indicators	Current situation	Target value
Number of employees in visitor industry-intensive sectors*	2019: 29,200 2020: 28,300	2025: 29,500 2030: 31,000

***According to selected SNI codes – see explanation in chapter 1 of the appendix. Source: Business Region Göteborg. Target values are evaluated annually and revised when necessary.*

Perspective: Work

6. The visitor industry grows in line with growing demand

An economically sustainable destination is characterised by local industry with good profitability that creates jobs and generates tax revenue. A balance between supply and demand is achieved when industry actors drive demand through new reasons to travel, improved accessibility and a stronger brand. At the same time, new and established actors are given opportunities to develop in a business climate where entrepreneurship and innovation are encouraged.

For many years, guest nights at commercial accommodation facilities have been used as the primary measure of the visitor industry's development. As more visitors want to stay overnight in varied ways, for example privately rented homes, guest marinas or campsites, there is a need for adding other measurements regarding the visitor industry's development. At the same time, the supply of commercial accommodation must continue to satisfy a fluctuating demand which varies from season and on different days of the week. For hotels, occupancy rate (capacity used for hotel rooms) is used as an accepted measure of how well the supply satisfies the demand. An average annual occupancy rate of more than 70% at the destination level has historically suggested that there is a shortage of capacity at times, i.e., there are not enough hotel beds available in the city to meet demand. A destination should therefore strive to have an average annual occupancy rate of just under 70% to have a good balance over the entire year between supply and demand at hotels.

Indicators	Current situation	Target value
Number of guest nights at commercial accommodation facilities*	2019: 5.1 million 2020: 2.5 million 2021: 3.5 million	2025: 5.1 million** 2030: 5.6 million**
The average occupancy rate at hotels in the City of Gothenburg*	2019: 72.5% 2020: 36% 2021: 44.5%	2025: Just under 70% 2030: Just under 70%
Number of overnight stays at campsites*	2019: 418,000 2020: 220,000 2021: 389,000	2025: 430,000 2030: 460,000

Number of overnight stays carried out at privately rented cottages and apartments via brokerage sites in the Gothenburg metropolitan region***	2019: 277,000	2025: 300,000 2030: 340,000
Number of companies (workplaces) operating in visitor industry-intensive sectors****	2019: 11,500 2020: 11,600	2025: 12,000** 2030: 13,000**

*Source: SCB Inkvarteringsstatistik [Accommodation statistics].

**Evaluated annually and revised when necessary.

***Relates to overnight stays in Eurostat's definition of the Gothenburg metropolitan region, which includes the municipalities of Gothenburg and Partille. Source: Eurostat.

****According to selected SNI codes – see list in chapter 1 of the appendix. Source: Business Region Göteborg.

7. The visitor industry strengthens other industries and academia at the destination

A vibrant city with a constantly developing visitor industry contributes towards strengthening the attractiveness of the entire region and has the ability to create enduring positive societal effects. The visitor industry's broad offering of experiences and facilities within culture, entertainment, sport, accommodation, and conference and meeting venues plays an important role in creating the right conditions for industry and academia to attract talent, workers, research, and investment in the region.

The Gothenburg region is one of Europe's fastest-growing regions, currently development involves major investments in the form of research and development. Here, the visitor industry can act as a tool where international meetings, conferences and events are used to profile Gothenburg's strengths and showcase its unique competencies. The visitor industry can be used as a communication platform to achieve strategic goals in cooperation with industry, academia, and the public sector. Gothenburg's brand as a destination involves being a place where knowledge is highly valued, while at the same time, the destination is further established as a meeting place and a knowledge hub for academia and the industry.

Indicators	Current situation	Target value
Industry and academia's experience of the visitor industry's ability to strengthen the region's attractiveness	<i>(measurement methods being developed in consultation with BRG)</i>	<i>(measurement methods being developed in consultation with BRG)</i>

8. World-class sustainability work

The destination's sustainability work requires the entire visitor industry's involvement within all three dimensions. The global climate challenge affects the visitor industry to a great extent, and there are growing expectations for the industry to act. In parallel with this development, there is also a greater focus on businesses' work with social sustainability. Increasing the number of actors within the visitor industry who are linked to third-party certifications drives sustainable development throughout the entire industry. Given the ambitions within the City of Gothenburg, the destination enjoys excellent conditions for carrying out world-class sustainability work.

For some time now, Gothenburg has positioned itself at the international forefront of sustainable destination development. The destination's success is the result of engaged and active sustainability activities. This position has been confirmed by the Global Destination Sustainability

Index (GDSI), in which Gothenburg has been ranked first for all five years when the ranking has been carried out. GDSI is an international benchmarking system that ranks destinations' sustainability performance and aims to contribute towards the development of more sustainable places, cities, and regions to visit, work in and live in. The index is developed and managed by the Global Destination Sustainability Movement (GDSM), which in turn is backed by established international visitor industry organisations such as the International Congress and Convention Association (ICCA) and the City Destinations Alliance (City DNA)¹⁰. The index is an important tool in the competition for international meetings and events. The tool reflects the destination's sustainability work from all three dimensions, as well as the city's management, control, and development of the destination. GDSI can be seen as a good indication of the effort towards the programme's overall objective: A sustainable destination by 2030. The content of the index is reviewed regularly. The index highlights key areas and initiatives and can thus be used as a development tool for the destination's actors.

Indicators	Current situation	Target value
GDSI sustainability ranking*	2019: #1	Annual top 3 placing
The proportion of environmentally certified hotel rooms in the City of Gothenburg**	2019: 95% 2021: 91%	2025: 96% 2030: 98%
Proportion of environmentally certified conference facilities in the City of Gothenburg**	2019: 100% 2021: 100%	2025: 100% 2030: 100%
Proportion of environmentally certified events and meetings***	2019: 15 2021: 3	2025: 28 2030: 40

*Source: GDSI.

**Relates to the City of Gothenburg. Source: Göteborg & Co/Gothenburg Convention Bureau.

***Source: SUSA event diploma scheme, Sustainable Event certification and Rise AB, the certification body for the ISO 20121 management system for sustainability in events.

¹⁰ On 31 March 2022, European Cities Marketing changed its name to City Destinations Alliance. [City Destinations Alliance is Born – European Cities Marketing](#)

Strategies

Strengthening Gothenburg as a sustainable destination is a complex challenge. The City of Gothenburg has the opportunity to promote development by making an active contribution within the framework of the operations and areas that the city has control over. Close cooperation and dialogue with the industry's representatives, active external monitoring and knowledge sharing give the city an insight into the visitor industry's challenges and opportunities. This lays the foundation for using innovative and sustainable ideas to drive changes towards the set objective of a sustainable destination by 2030.

Four strategies have been formulated to clarify how the objectives will be achieved. These strategies are cross-sectoral and contribute in different ways towards both the overall objectives and the formulated goals. In addition to cooperation, digitalisation and communication are also central building blocks and success factors in all four strategies. The committees and boards that are named as 'key actors' are dependent on – and have control over – significant portions of the current strategy, however, to differing degrees. The destination's success relies on cooperation with many other actors outside the City of Gothenburg, within the public sector, industry, voluntary organisations, academia, and residents, both regionally and nationally. Various conflicts arise on a regular basis, and it is essential for successful cooperation to deal with conflicts in order for them to not become barriers to implementation. The strategies are expected to have the capacity to deal with conflicts that arise.

Strategy 1: Develop and create conditions for attractive experiences and reasons to travel

Gothenburg should continuously strengthen, develop and maintain the existing offering, in combination with driving forward and facilitating the development of new reasons to travel, concepts and sustainable business models. A rich and varied offering of art, culture, food, entertainment, commerce, natural experiences, activities, etc., enhances attractiveness for visitors and improves the quality of life for residents.

Sustainable destination development involves visitor streams being balanced through a vibrant and accessible offering all year round, throughout the entire destination. This gives incoming travellers more reasons and possibilities to visit several places, stay longer and consume more of the destination. Better opportunities are thereby created for profitability among the industry's businesses and more full-time jobs within the region. More steady visitor numbers at tourist attractions and green spaces, arenas and facilities limit wear and tear and combats overcrowding, which is important from a resident's perspective.

The development of attractive reasons to travel across the entire destination outside traditional high seasons is a prioritised issue. The city's cooperation with the visitor industry's new and existing actors in their business- and concept development processes for sustainable, attractive products is therefore crucial. One effective guiding tool is sustainability certification, which more actors throughout the entire destination should strive for. Through clear communication of product range and alternatives, actors can persuade visitors to make sustainable consumption choices, both during their stay and when travelling to and from the destination.

Gothenburg as a destination has an excellent reputation as a host and has arranged many of the

world's major events, trade fairs and meetings over the years. An important part of this success is a clear focus on sustainability both at the sign-up stage and in the actual implementation. This means that Gothenburg drives organisers' sustainability work by placing demands, challenging them, and supporting them in their development work. Annual international and national cultural and sporting events are a central aspect of Gothenburg's attractiveness and are an engine for the destination's visitor industry. Events and meetings help to even out the visitors' streams over the course of the year and prolong the visitor season. Within a city or a region, events and meetings can act as communicative platforms and experimental arenas for urban development, sustainability ambitions, societal development, as well as skills development. This has led to developing and attracting events and meetings in increasingly tough international competition. Gothenburg – like many destinations around the world – therefore intends on better using events and meetings as a driving force for societal development in which there is a legacy of long-lasting value for the destination and its residents.

With knowledge, commitment and cooperation, public sector actors can create the right conditions for attractive experiences and reasons to travel that reinforce the destination's competitiveness while also contributing towards societal development that is sustainable in the long term. A successful destination is based on the ability to persuade more people to discover and choose Gothenburg. All actors within the destination shall encourage and contribute towards the development of sustainable experiences, new places and accessible products that strengthen the destination's attractiveness.

The City of Gothenburg does this by:

- Supporting and encouraging stabilisation of seasons and establishing new reasons to travel and new tourist attractions (physical, digital and hybrid), as well as maintaining and developing existing locations and reasons to travel, throughout the entire destination.
- Developing and strengthening the destination's ability to attract and host more sustainable meetings and events that strengthen and leave behind lasting value for the destination and its residents.
- Reinforcing the destination's brand in relation to new and existing target groups through effective and active communication.
- Developing and deepening cooperation in connection with destination development across municipal borders within the Gothenburg region.
- Supporting and encouraging actors to develop and communicate sustainable operations, products, and alternatives.

Key actors: Business Region Göteborg, Got Event AB, the Sports and Associations Committee, Liseberg AB, the Culture Committee, the Environment and Climate Committee, the Parks and Nature Committee, the Traffic Committee, Göteborg & Co AB.

Strategy 2: Stimulate the development of the visitor industry's infrastructure

Within destination development, the visitor industry's infrastructure consists of arenas and facilities for meetings, trade fairs, accommodation, culture, sport, commerce, and restaurants, for example, as well as parks, roads, and transport. This also involves access to nature, fresh air, and clean water. Investing in well-balanced, well-planned infrastructure that features modern, flexible facilities and arenas is essential in order for Gothenburg to be able to meet increased and changed demand. This infrastructure is thus fundamental to the visitor industry's sustainable growth and is a requirement for the destination's competitiveness.

Good access to the destination by land, water and air is essential for making visits possible. The climate impact of various means of transport is one of the visitor industry's greatest challenges, and transport needs to be developed to approach zero emissions. Improving access to and the attractiveness of low emissions transport systems is also important in order to enable both international and national visitors to travel to the destination in a sustainable manner. There are opportunities for public sector actors in Gothenburg to support the expansion of sustainable infrastructure, for example by cooperating regionally, nationally, and internationally for improved conditions for convenient, sustainable travel and smart booking for international travel by rail, as well as multimodal journeys. The City of Gothenburg also carries out other initiatives by supporting and placing requirements on the sustainability work of actors such as transport providers, arena owners and conference facilities. The City of Gothenburg can encourage the development of – and create – incentives for sustainable travel, both to and at the destination, and can include the visitor industry's and the visitor's perspectives in the city's and region's efforts regarding smart mobility and the transition towards a fossil-free, electrified transport system. The city can also encourage actors to choose renewable energy solutions, such as renewable electricity for facilities, trade fairs and events.

Public transport at the destination is a key issue for an equal offering and accessibility on equal terms, both for residents and visitors. Advanced public transport on land and water contributes towards good mobility and access that enables actors to establish themselves and allows more visitors from the local region and residents to participate in the entire destination's offering. Close cooperation between the City of Gothenburg and Region Västra Götaland on developing sustainable, effective public transport is therefore of great importance in order to enable more people to visit from the surrounding region.

Digital infrastructure makes the destination accessible and links together the destination's offerings. Digital platforms allow for the development of new income models for hybrid experiences and digital events and make physically inaccessible experiences possible. A destination's digital infrastructure is also a tool for predicting visitor streams, improving security, and steering information flow, for example.

Public-sector investments alongside or in partnership with private-sector investments can help to enhance the destination's attractiveness and create the right conditions for the visitor industry's advancement and competitiveness. By considering the needs of both citizens and the visitor industry, public-sector actors can make socially beneficial investments that both improve the quality of life for citizens and create sustainable growth within the visitor industry.

The City of Gothenburg does this by:

- Developing the city's array of arenas, performance venues and facilities for sport and culture, in terms of both width and quality, for everyday activities and for one-off or recurring events and meetings.
- Encouraging and promoting the development of sustainable transport and the transition towards sustainable travel.
- Working to meet the demand for new hotel rooms and other commercial forms of accommodation, such as camping and guest marinas.
- Encouraging the development of the destination's infrastructure and acting at regional and national levels to improve the destination's accessibility by rail, as well as by road, water, air, and public transport.

- Strengthening and developing the destination's digital infrastructure as a prerequisite for an attractive, competitive, and smart destination.

Key actors: Business Region Göteborg, the Building Committee, the Real Estate Committee, Göteborg Energi AB, the Port of Gothenburg, Got Event AB, Göteborgs Spårvägar AB, Göteborgs stads parkering AB, Higab AB, the Sports and Associations Committee, Intraservice, the Culture Committee, Liseberg AB, the Parks and Nature Committee, Renova AB, the Traffic Committee, Göteborg & Co AB.

Strategy 3: Strengthen the interaction between urban development and the visitor industry

Gothenburg is currently undergoing its biggest growth spurt in modern times and will accommodate 150,000 new residents by 2035. From a visitor industry perspective, this means a growing region with an ever-larger customer base and thus demand. Attractive, safe, accessible environments, well-maintained public spaces and high-class architecture contribute towards the destination's growing attractiveness. New districts, areas or buildings can contribute as reasons to visit in themselves. Events, public fairs, and meetings can act as communication platforms for urban and location development.

Considering conditions for the visitor industry's advancement in various ways in efforts involving urban development provides the scope for a growing, more attractive destination. This includes facilitating land and providing access to electricity, fibre broadband, water, sanitation, maintenance, cleaning, accessibility, and signage. In order to meet changed and expanded demand for new experiences and visitor attractions, the destination's public-sector actors need to have a permissive and open approach regarding flexible and adapted use of the destination's places, cultural environments, parks, and natural areas.

The destination's supply of natural experiences in parks, the archipelago and green spaces shall be accessible and adapted for all visitors and residents. Natural experiences and cultural heritage need to be developed, preserved, and taken care of. Sustainable destination development includes monitoring the potential overuse of places and development taking place with care for the actual place. Conflicts of interest in connection with overcrowding can arise between residents and visitors, attached to urban consolidation of inner-city areas, home building and the use of open spaces for events, or between a complex permit process and the ambition to provide cultural experiences such as temporary art. Closer dialogue with residents and visitors is important in order to increase the common understanding of benefits, value and need for expansion. Through this dialogue, the destination's actors can measure and analyse aspects such as accessibility, offering and quality.

It is advantageous for a destination to have centrally and strategically located places that are universally designed for recreation, activities, and meetings between people. This makes events accessible to more people and creates unique experiences and broad visibility, which is widely regarded as a competitive advantage for Gothenburg as an event city. For many of the destination's major annual sporting events, the use of public spaces is of decisive importance for event branding and development. In the implementation of events, demands are placed on relevant actors to plan and manage large flows of visitors in a safe and secure manner, with good accessibility.

There is great potential in increasing mobility between different parts of the destination by highlighting and marketing local arrangements. Events outside the central areas of the city can increase interest and curiosity among visitors and residents alike. In the same way, it is important that the city's central areas are attractive and welcoming for both visitors and residents. The visitor industry contributes towards a vibrant environment and location development which reinforces social values such as security, inclusion, and integration, in which residents have the opportunity to discover other places and meet new people. Through close and active cooperation between various public bodies and the visitor industry's actors, the right conditions are created for devising sustainable solutions and for strengthening the interaction between the visitor industry and urban development.

The City of Gothenburg does this by:

- Considering the visitor industry's conditions and the visitor perspective when working with urban and location development.
- Strengthening and incorporating the perspective of residents and the local community within destination development and balancing the development of locations in line with their capacity and ability.
- Making use of the visitor industry's offering to increase the area's attractiveness when establishing and developing districts, places, and environments, for example.
- Improving coordination and clarifying guidelines in connection with planning and the use of central and other strategically located places that are suitable for one-off or repeated events.
- Working to improve and simplify processes regarding permits for visitor industry-related temporary activities such as events, dining, and art exhibitions.

Key actors: Business Region Göteborg, the Building Committee, the Real Estate Committee, Göteborgs stads parkering AB, Got Event AB, Higa AB, the Sports and Associations Committee, the Water Cycle and Water Committee, the Culture Committee, the Environment and Climate Committee, the Committee for Democracy and Citizen Services, the Parks and Nature Committee, Renova AB, the Traffic Committee, Göteborg & Co AB.

Strategy 4: Act as a role model and facilitate innovation

Gothenburg has a strong culture of innovation. Through an open attitude towards sustainable development, innovation and creativity, an attractive region is created for investors, businesses, academia, labour, and students. Here, the visitor industry's involvement and contribution are further reinforced and clarified through greater openness to new actors and new ideas.

Gothenburg aims to be a creative testbed for methods and innovative business models that contribute towards sustainable growth. In this way, more jobs are created in the region and the destination's attractiveness increases. Innovative business models are needed in order for the destination to reduce the visitor industry's impact on the environment and the climate. All this is made possible through broad cooperation.

Knowledge should be the foundation for the destination's innovation work, and Gothenburg should strive to position itself as a recognised knowledge hub for the visitor industry. By compiling, refining, and sharing knowledge about aspects such as visitors' consumption, behaviours and driving forces, the ability of the destination's actors to understand the potential of this demand is strengthened. This enables more visitor industry actors, entrepreneurs, associations, and cultural actors to develop content, products, services, and concepts that boost the offering and the destination's attractiveness. Knowledge also leads to target group insights that

contribute towards the right conditions for shaping and developing relevant communication that reinforces the destination's brand.

In-depth knowledge of visitors' movement and consumption patterns can contribute to other sustainability efforts within the city, such as safety-enhancing activities, improved access to culture and recreation, cleanliness, as well as transportation and traffic planning. Increased collaboration between actors in the tourism industry and the city on these issues strengthens the industry's impact and contribution to societal development.

The ability to forward innovation through knowledge is essential in developing the destination's long-term and sustainable attractiveness and can only be strengthened through innovative cooperation between industry, academia, the public sector, cultural life, and associations.

The City of Gothenburg does this by:

- Contributing towards positioning Destination Gothenburg nationally and internationally concerning education and research within the visitor industry, destination development and the experience industry.
- Participating in the improvement of methods and systems for analysing travel patterns, driving forces and consumption behaviour among visitors and residents.
- Disseminating knowledge to the visitor industry's actors to inspire business development and increased commitment to sustainability throughout the entire destination.
- Working to increase cooperation and new partnerships between the public and private sectors, both locally and internationally, to contribute towards innovation.
- Encouraging and supporting processes that lead to meetings and events being able to act as testbeds for solutions and as a catalyst for societal benefits.
- Encouraging and supporting new establishments within the visitor industry and making the visitor industry visible in regional and national support structures for industry development and innovation.

Key actors: The labour market and adult education, Business Region Göteborg, Got Event, Göteborgs Stadshus AB, Intraservice, Johanneberg Science Park AB, the Culture Committee, Lindholmen Science Park AB, the Environment and Climate Committee, the Committee for Democracy and Citizen Services, Göteborg & Co AB.