

2010

SUSTAINABILITY REPORT
FOR VISITSWEDEN

Well on the way to a better world

The environmental debate has subsided in recent times. However this doesn't prevent VisitSweden from intensifying its efforts for sustainable tourism and a sustainable Sweden. Because we're convinced that a clear position as a sustainable destination is one of our greatest assets, now and in the future. The target of the new national strategy for the Swedish tourism industry is to double sales by 2020. This places considerable demands on the industry. We must keep an eye on our assets and not lose sight of the sustainable issues on the way. VisitSweden as a company has, relatively speaking, little environmental impact, but we can have a positive effect on environmental, financial and social developments by way of our communication with potential visitors and the Swedish tourism industry.

Sustainability is about much more than just the environment. We want our foreign visitors to be happy in Sweden, and the tourism industry and Swedish society to make money.

Sustainability work is a joint responsibility that is about long-term developments, where the results are sometimes difficult to see in the short term. For this reason we must remain steadfast.

VisitSweden's contributions to sustainability are to:

- encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly
- feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences
- promote and engage in sustainability issues at company, national and international levels.

For VisitSweden it's important to live as we learn. Within the company we work actively with sustainability, gradually implementing sustainable practices. VisitSweden is a climate-neutral company and we carbon-offset for our business travel, electricity and heating.

MILEPOSTS 2010

August

Strategy and vision

September

Communication Strategy

October

Inspiration day for Swedish tourism industry

November

Start for criteria for climate-neutral events

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“Respect and care are natural when Sweden and VisitSweden meet the world”

Sweden is highly respected internationally, in terms of environmental and sustainability issues. We Swedes live in unique proximity to our abundant nature, it's a part of us, and we have a strong tradition of appreciating and conserving it. Our capital city was selected as the very first European Green Capital and we have strict national targets regarding the environment. Many people, both in Sweden and abroad, expect Sweden to excel in sustainability.

Increased travel – greater demands

Increasingly, travel is a normal part of people's lives. It can be a holiday full of relaxation, excitement or personal development, work-related travel taking us to meetings, conferences or an incentive trip. A growing middle class in densely populated countries like China and India means that increasing numbers of people are able to travel. Increasing globalisation and Sweden's export-intensive industry will result in continued business travel. The tourism industry must do its part and offer travellers more sustainable products that are both exciting and good value. Experiences, accommodation, meeting facilities and transports with the least possible environmental impacts should be standard offerings, not exclusive options.

Travel to Sweden continues to grow and we can confirm that the past seven years show an unbroken trend of record results¹ for the number of overnights from abroad. The Swedish state and tourism industry have charged VisitSweden with attracting more travellers to the country, and this is also established in the national strategy for the tourism industry², presented in the summer of 2010.

“Sweden has every possibility to take the position of the sustainable destination in Europe”

Conscious target groups

VisitSweden, together with our partners in the Swedish tourism industry, focusses on selected groups of business and leisure travellers – people who are experienced travellers, globally conscious and environmentally aware. Our target group analyses tell us that many people associate Sweden with environmental care, a result of our strong natural profile. We interpret this to mean that they expect Sweden, with its abundant natural resources, to automatically care for its outdoors.

VisitSweden does its bit

In 2010 VisitSweden's main focus was on sustainable tourism. In addition to increased awareness of sustainability within the company, we developed an over-arching strategy, a clear vision and a joint communication strategy for the Swedish tourism industry. These concrete tools will enable us to get more visitors to select sustain-



able experiences, inspire the industry to develop more sustainable products, be even better at using sustainable practices ourselves, and perhaps most importantly: make sustainability a natural part of what Sweden offers our target groups. During 2010 VisitSweden grew, with more offices and employees with fully booked schedules. This is the main reason our environmental impacts resulting from travel, electricity and heating increased during the year. We already carbon-offset for our impacts and in 2011 we will endeavour to reduce our total impacts once again.

Communicating sustainability

Sweden has every opportunity to seize the position as the sustainable destination in Europe, but we're not there yet. The first step is a demand for sustainable experiences from our target groups, and that VisitSweden and Swedish destinations develop and more clearly communicate sustainable experiences, accommodation and transport. But most of all, the sustainable destination of Sweden should be enjoyable, fun, inspirational and educational.

VisitSweden's vision for sustainability

By 2020 VisitSweden will have successfully positioned Sweden as the sustainable destination in Europe for the Global Traveller and the Global Company, a destination that is fun, inspirational and educational to visit. To achieve this, all of VisitSweden's communication and actions will naturally emphasise that environmentally sound behaviour lead to financial benefits, social engagement and environmental leadership³.

I am proud to work for a climate-neutral company. I'm also proud to represent a country that embodies good values in the eyes of travellers, with its abundant nature, cutting-edge green practices and genuine hospitality – a destination brimming with exotic, attractive experiences. Let's play our cards right and take the position of European leader in sustainability.

Thomas Brühl, CEO VisitSweden

¹ Overnights at hotels, cabins and hostels. Source: Swedish Agency for Economic and Regional Growth

² www.strategi2020.se

³ Financial benefits – showing that environmental care brings financial benefits, short term but especially long term.

Social engagement – helping ensure that all of Sweden, both urban and rural, has sustainable growth.

Environmental leadership – working environmentally today, to maintain an attractive product in the long term.

Sustainability and global responsibility

Tourism matters

Tourism plays an important role in the interaction between people and cultures, as well as in people's social wellbeing. But tourism isn't an isolated phenomenon. It presupposes development in harmony with the people, societies and environments around us, so it's sensitive to impacts from many sources. This is why all aspects of sustainability – environmental, social and economic – must have the same opportunity to develop.

Tourism is one of the world's fastest growing industries, forming an important part of the economic growth of many countries. At the same time, just five per cent of the world's carbon dioxide emissions comes from tourism⁴, and prompt action is required to relieve the environmental effects of the increase in travel. Even though travel to Sweden has not reached the volumes of destinations like France or the United States, the significance of Swedish tourism is growing. The Swedish tourism industry can take a more active role in reaching the ambitious targets set for Sweden through active national and international efforts for sustainable tourism.

VisitSweden sees three factors in particular that enable Sweden to position itself as a country that cares about climate change and sustainability.

1. Expectations

Sweden is viewed as a country that works consciously with sustainability, and that cares about its population, its businesses, its surroundings and its nature. Many travellers assume that Sweden, with its abundant natural resources and environmentally conscious population, works actively for sustainable development.

2. Consumer behaviour

Consumer awareness of climate issues and sustainability is growing, and sustainable options are increasingly available. More and more people feel they want to contribute actively to a sustainable world, even if they have not started to buy sustainable products on a large scale. The travellers who VisitSweden targets are globally conscious, have relatively high incomes and are experienced travellers who seek new, exciting destinations.

3. Credibility

Sweden and Swedish destinations can supply sustainable products and talk about them in a credible fashion.

Sweden is already well respected with regard to sustainability issues, and according to the World Economic Forum is the country that is best positioned to achieve sustainable development. In some countries Sweden is seen as a leader in sustainable travel⁵, while in others we must continue our efforts to boost awareness of Sweden as a sustainable destination. Moreover, today many countries are focussing firmly on sustainability issues and on spreading these messages to the rest of the world.

Experiences and meetings in Sweden, in the city or the country, are always close to nature. Photo: Henrik Trygg



4. UNWTO/UNEP, *Climate Change and Tourism – Responding to Global Challenges*, July 2008, p. 132.

5. *NBI Index 2010*

VisitSweden and sustainability

VisitSweden has a mandate from the Swedish state and the Swedish tourism industry to market Sweden and Swedish destinations and experiences, with the purpose of increasing revenue from foreign travellers. At VisitSweden we firmly believe that Sweden has the potential to take an even stronger position as a sustainable destination, and we see an opportunity to encourage, but not to force, foreign visitors and the Swedish tourism industry towards greater sustainability. Our target group analyses enable us to monitor the current and future environmental interests of potential travellers in our prioritised markets.

As the driving force in the marketing of the destination Sweden, VisitSweden builds networks in Swedish tourism. This gives us a huge opportunity to advance sustainable development together with tourism industry organisations and companies, for instance by spreading knowledge of the target groups' travel habits and in the selection of joint messages and marketing activities. We have just begun this work. We have also started to highlight sustainable experiences in our marketing aimed at the travellers. By doing this, VisitSweden wants to inspire Swedish companies to offer more sustainable experiences to potential travellers. This is done through direct communication with foreign travellers as well as through tour operators and foreign journalists.

Interest in sustainable travel is growing, although slowly, as we can see from articles in international media. Despite this growth, few travellers are choosing environmentally certified accommodation for environmental reasons⁶.

We at VisitSweden can help our country reach the demanding climate targets by inspiring travellers and the tourism industry in Sweden. VisitSweden's firm focus on overarching themes for the message (see page 14), and on establishing partnerships are vital components in developing an attractive, sustainable destination.

There are two reasons why we want to be involved: first and foremost, for the benefit of Sweden's environment, people and economy, but also to identify new business opportunities for the Swedish tourism industry. VisitSweden's mission to increase inbound travel, which boosts export revenue and employment, also includes a challenge to strive for long-term environmental sustainability.

Definition: Sustainable tourism

VisitSweden uses a definition of sustainable tourism as stated in the UNWTO's and the Brundtland Commission's definitions of sustainable tourism and sustainable development:

Sustainable tourism is closely related to sustainable development⁷ and always has three perspectives: economic, ecological and social sustainability⁸. A sustainable destination must integrate these three areas to achieve long-term sustainable growth.

The aforementioned definition is VisitSweden's starting point in its work on sustainable development for Sweden as a destination, as well as for the company itself. From this perspective we can identify risks and opportunities that are important for the development of Sweden as a destination for foreign visitors. The most immediate challenge for VisitSweden is to work on green issues, as we are based in a country with a long history of social and economic development and security.

VisitSweden in international collaborations

VisitSweden faces the same sort of challenges regarding sustainable development as many other national tourist boards and offices. This is why it is important to push this issue together, to build consensus and to boost effectiveness. Over the past year the European Travel Commission, in which VisitSweden is an active member, has worked actively with sustainability and has identified the most important challenges⁹ for the European tourist boards and offices. For instance, that it is important to live up to the UN and EU national policies on climate change and sustainable development, to spread knowledge and to develop quality assurance systems. The development of green experiences and services is important – and this will increase in the future. The winner will be the destination that can credibly play its part in environmental issues, and that can work in a focussed, organised fashion. Of course, these efforts can be highlighted in the destination's communication efforts.

VISITSWEDENS VISION FÖR HÅLLBARHET

År 2020 har VisitSweden framgångsrikt positionerat Sverige som det hållbara resmålet i Europa för VisitSwedens prioriterade målgrupper, Den globala resenären och Det globala företaget – ett resmål det känns roligt, inspirerande och lärorikt att resa till. Detta genom att all vår kommunikation och agerande på ett naturligt sätt lyfter fram ekonomisk affärsnytta, socialt engagemang och miljömässigt ledarskap¹⁰.

OVERARCHING STRATEGY FOR SUSTAINABLE TOURISM

VisitSweden will:

- encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly
- feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences
- promote and engage in sustainability issues at company, national and international levels.

VISITSWEDEN'S SUSTAINABILITY TARGETS FOR 2020

Motivate visitors (the Global Traveller and the Global Company). By 2020 the target group will see Sweden as a sustainable destination.

Mobilise the tourism industry.

The Swedish tourism industry will believe that VisitSweden as a communications company demonstrates active leadership in sustainability.

Promote sustainability issues.

VisitSweden will promote and influence others with regard to sustainability in prioritised areas/projects/assignments, both nationally and internationally.



Kosterhavet National Park, the first of its kind in Sweden, was opened in 2009. The sea around these islands contains some 200 unique species, including glass coral, brachiopods and sponges. Photo: Mikael Almse. www.vastsvetige.com

6. CMI Green Traveler Study Report 2010-11: "62% of respondents said that they did not pay extra to stay at a "greener hotel" in the last 12 months.", "Green is still not something customers will actually pay extra for today; they won't pay a "green tax." http://communitymarketinginc.com/cmigreen/docs/cmigreen2010_11.pdf

7. The Brundtland Commission's definition of sustainable development, from the 1992 UN Conference on Environment and Development in Rio de Janeiro: "Development that meets the needs of the present without compromising the ability of future generations to meet their own needs." This definition spread quickly all over the world.

8. Conceptual Definition of Sustainable Development of Tourism, UNWTO, 2004

9. What role should European NTOs play on climate issues?, questionnaire among European ETC members, July 2008.

10. Financial benefits – showing that environmental care brings financial benefits, short term but especially long term.

Social engagement – helping ensure that all of Sweden, both urban and rural, has sustainable growth.

Environmental leadership – working environmentally today, to maintain an attractive product in the long term.

Sweden as a sustainable destination – risks and opportunities

Unlike 2007 and 2008, in 2010 the green debate cooled down in Sweden. But sustainability work continued in Swedish regions and companies, often increasingly integrated in the operations. 2010 was also the year when Stockholm was named the very first European Green Capital, on the basis of the long-term, forward-thinking environmental work that the city has been implementing for many years. The WWF named the city of Malmö the Earth Hour Capital, for the municipality that is most prepared to take long-term measures against climate change¹¹. In many areas of Swedish society, concern for green issues has become completely natural. Similarly there are actors promoting Sweden as a destination who have long focussed on sustainability and offer fantastic experiences that are kind to both the guest and the environment.

Sweden's unique characteristics present opportunities to build a stronger position for Sweden, for instance as a sustainable destination. In these efforts VisitSweden wants to be a driving force, for instance by spreading knowledge about travel trends. By staying informed about what our competitors do and about travel patterns that don't benefit Sweden, VisitSweden and the travel industry can rapidly react to trends and other countries' campaigns.

Consumer awareness is increasingly evident, but many feel they feel that it is the responsibility of the suppliers and product owners to provide greener alternatives. With Sweden's geographical location, good access by air is crucial for the development of incoming travel.

Of course, people's transport choices have an effect on the climate, and VisitSweden is pleased to see that additional transport modes are developing or have already introduced more climate-friendly fuels. For instance Sweden is one of the few countries to have introduced emission-related charges at the state-owned airports¹². Research is underway to develop more eco-friendly aviation fuels, such as bio-fuels and hydrogen gas¹³. VisitSweden also sees the importance of monitoring developments, both in terms of travel trends and how transport options evolve according to their environmental impact and the traveller's requirements and economy.

Travel to Sweden has increased in recent years, and in 2010 this trend continued at a rate higher than the European average¹⁴. More visitors means more 'ambassadors' for Sweden, which spreads a positive image¹² to friends and acquaintances. This in turn translates into greater general awareness of the country.

That climate change is real and is affecting our environment and our world is not a new discovery; scientists have been telling us this for more than half a century. However, people's awareness of environmental issues and climate change is becoming more evident, even if the focus on such matters can decrease in a weaker financial climate¹⁵. Increasingly, these issues are likely to determine future means of travel. Reports¹⁶ show that consumers are becoming more aware, but that they feel that it is the responsibility of the suppliers and product owners to provide greener alternatives.



Sami-themed tours on horse-back, through one of Europe's largest wilderness areas, Vindelfjällen. The company Fjällhästen is quality certified by Nature's Best.

Photo: Staffan Widstrand

11. <http://www.malmo.se/Medborgare/Miljo--hallbarhet/Nyhetsarkiv/Nyhetsarkiv-Miljo--hallbarhet/3-15-2011-Malmo-stad-utsedd-till-klimatsmartaste-kommunen.html>

12. <http://www.transportstyrelsen.se/sv/Luftfart/Miljo/Flygets-miljopaverkan/>

13. <http://www.transportstyrelsen.se/sv/Luftfart/Miljo/Flygets-miljopaverkan/>

14. UNWTO, World Tourism Barometer, Advance Release, January 2011.

15. Special EU Barometer, 313/Wave 71.1-TNS, July 2009.

16. Special Barometer 295/wave 62.2 – TNS opinion & social, March 2008: Attitudes of European Citizens towards the Environment. Interviews of 27,000 respondents (1,000 per EU country), with selected results as follows:

- 96 per cent feel that it is important to protect the environment
- 86 per cent see themselves as individuals who can play a part in protecting the environment in their countries
- 75 per cent are prepared to buy environmentally friendly products, even if they cost a little more. However only 17 per cent actually buy such products.

Analyses and results

Sweden's status as an eco-friendly country is evident in a number of studies comparing the world's countries based on various parameters. A few examples:

- The Anholt-GfK Roper Nation Brands Index ranks countries based on exports, people, governance, tourism, culture and heritage, and investment and immigration. Sweden is regarded highly when it comes to environmental care, placing second of 50 countries in 2010¹⁷.
- The Environmental Performance Index is a ranking system for the environmental health and ecosystem vitality. Sweden's 2010 placing: 4 (of 163 countries)¹⁸.
- The Environmental Sustainability Index grades the environmental sustainability of countries in relation to other countries. In 200 Sweden had a fourth place¹⁹.
- In the World Economic Forum's Travel & Tourism Competitiveness Report, Sweden is ranked number one for competitiveness in environmental sustainability²⁰.

Possibilities

Sweden is recognised as an environmentally aware country²¹. Together with the Swedish tourism industry, we want to take advantage of this. Also, Sweden has vast areas of countryside and for many people this means we take care of our natural world. To this you can add the population's green lifestyle²².

Swedish companies are known for their commitment to social and community issues. They are good at voluntarily working for a better

society and a cleaner environment, for instance through a far-reaching product liability. All of this only enhances the image of Sweden as a sustainable destination.

The majority of overnights from abroad are from neighbouring markets: Norway, Finland and Denmark, and from European markets like Germany, the Netherlands and Great Britain. There is much potential to further increase travel from these markets. With a focus on direct flight routes, travel from neighbouring and European markets is preferable to distant markets, from the environmental point of view. It is in these markets that VisitSweden currently invests the most marketing resources.

Many players in the tourism industry are working hard to find more climate-friendly fuel options – for instance transport companies are focussed firmly on identifying more climate-friendly fuels. Intensive work is also underway to achieve zero emissions of carbon dioxide at Sweden's largest airports, including Stockholm-Arlanda, Göteborg-Landvetter and Malmö Airport²³.

Through continual analysis of the target groups that VisitSweden directs its marketing at, we get good information on their views on sustainability. This enables us and our partners in the Swedish tourism industry to adapt our offer to the wishes of the potential travellers.

Strong commitment to sustainability from within VisitSweden continues to result in concrete strategies for the improvement of the company's own environmental impacts. (Read more about VisitSweden's environmental impacts on page 23.)



Hammarby Sjöstad is a precinct in Stockholm that has received huge attention worldwide for its environmental focus. With its own environmental programme and its own model for a cycle of energy, waste and water management, the aim is to minimise environmental impacts. Photo: Johan Töpel and Envac.

17. Swedish Institute; Nation Brands Index (<http://www.si.se/Svenska/Innehall/Sverige-i-varlden/Sverige-bilden-utomlands/Nation-Brand-Index/>)

18. Yale Center for Environmental Law & Policy (<http://envirocenter.research.yale.edu/programs/environmental-performance-management/exploring-trade-and-the-environment>)

19. Center for International Earth Science Information Network (CIESIN) at Columbia University and the World Economic Forum (<http://www.yale.edu/esri/>)

20. World Economic Forum, Travel & Tourism Competitiveness Report 2011 http://www3.weforum.org/docs/WEF_TravelTourismCompetitiveness_Report_2011.pdf

21. World Economic Forum, Travel & Tourism Competitiveness Report 2011 http://www3.weforum.org/docs/WEF_TravelTourismCompetitiveness_Report_2011.pdf

22. • 80 per cent of Swedes do something to reduce waste. The most important measures are buying more sustainable goods and eating up everything you buy. Avfall Sverige, 2010 http://www.avfall Sverige.se/fileadmin/uploads/Avfall_Sverige_Yngre/Nyhetsbrev/nyhetsbrev18_10.pdf

• Four out of five Swedes think they have a great responsibility to do something about climate change, according to a study from Synnovate. http://svt.se/2.120097/1.1803827/svenskar_tar_start_ansvar_for_klimatet

• 89 per cent of Swedes say they "absolutely" or to some degree consider themselves climate conscious. 83 per cent say they sort their refuse more, 78 per cent say they recycle things more often. Source: Rapport 3, P1087, Swedish EPA 2009 <http://www.naturvardsverket.se/sv/Nedre-meny/Nyheter/Nio-av-tio-anser-sig-vara-klimatmedvetna/>

23. Swedavia's environmental targets, <http://swedavia.se/en/Start-page/Environment/Swedavias-environmental-work/10-environmental-targets/>

Risks

For many travellers, Sweden lies at the periphery of Europe, which can give the impression of long travel times. Amidst tough competition there can be a temptation to exclude Sweden in favour of less distant destinations, when planning business or leisure travel. Increasing numbers of Swedish companies are incorporating an active environmental approach in their operations. However this has not yet translated into altered consumption patterns among European consumers. There are still relatively few travellers who are prepared to actively pay more to travel in an environmentally neutral way, for example by purchasing carbon offset credits.

Other countries are working intensively and systematically on sustainable development in order to bolster their country's green profile. The risk here is that Sweden could lose its strong position in the sustainability rankings. Sustainability, especially in forms other than environmental, can be difficult to communicate to potential travellers in a simple fashion. For instance, most certification systems (in Sweden's case Krav, Swan and Nature's Best) are on the national level, which complicates comparison with other systems. And many travellers lack the requisite knowledge to make rational choices when booking a trip or a meeting.

Regulations or other national standards can prevent the development of accessibility or other factors of benefit to environmental travel. These can include different railway track widths or rules for high-speed trains, access to alternative fuels or rule changes for tourist visas.

Tourism is an industry that is often affected by world events; natural disasters, political instability and other developments often have a large impact on travel flows. But we have also seen that travellers forget quickly and return to the destination if it is sufficiently attractive. Another fact is that accessibility has a large effect on travel – both positively, e.g. increased access to convenient flights and low-price fares, and negatively, e.g. greater awareness of environmental impacts or high fuel costs.

Future travel flows are expected to shift increasingly to Asian markets, both for incoming and outgoing travel. Currently, VisitSweden's main focus is on influencing local and European markets, which can affect the number of travellers negatively in the long term²⁴.

Future challenges

VisitSweden's mandate involves attracting as many foreign business and leisure travellers as possible to Sweden, to achieve increased growth and revenue for the Swedish tourism industry and the Swedish state. It also includes working with a long-term, sustainable approach. This places considerable demands on the assignments developing in parallel, in order to achieve a long-term development that benefits Sweden and the Swedish tourism industry. VisitSweden wants to boost awareness of sustainable travel, with the purpose of

giving the traveller the knowledge and the tools to make conscious choices for more sustainable travel. Sweden aims to be such an attractive, sustainable destination, making it an exciting option for increasing numbers of visitors.

VisitSweden's strategy for sustainable tourism should inspire travellers to come to Sweden in a responsible way, rather than to other destinations. For this reason VisitSweden must collaborate with partners to develop new sustainable experiences, to match the interests of more visitors and to strengthen the overarching message that Sweden is a sustainable destination. This will enable businesses in the Swedish tourism industry to enhance their sustainability work, the attractiveness of their experiences and especially the benefit to their business.

Today 45 per cent of the people in VisitSweden's target groups who say they consider the environment in conjunction with holiday travel feel it is not easy to find green alternatives when planning their trip. A challenge for VisitSweden is to make sustainable travel more accessible for potential visitors, by way of efficient communication.

Sustainability and business benefit

A destination that evolves its experiences in a sustainable direction has a long-term attraction. There is a close link between businesses developing sustainable experiences and business benefit. When businesses see a benefit they have an incentive, and VisitSweden wants to enhance this through efficient communication that supports the demand.

In the Swedish tourism industry there are many companies and organisations that have worked strategically and purposefully with environmental issues and sustainability, such as Scandic, Icehotel, the Nature's Best companies, Arlanda Airport and STF. For Sweden, sustainability is not an incentive for travel, but is a very important part of the overall positive image of Sweden around the world.

In the long term, sustainability is necessary if Sweden is to maintain its standing as an attractive destination, at the same time as VisitSweden has a mandate to increase travel to Sweden. For this reason, VisitSweden should make it easier for travellers to Sweden to find the sustainable options. VisitSweden should also communicate an overall image of Sweden as a destination that takes sustainability seriously.

Sustainability is the way to the target

VisitSweden has many opportunities to explore, in its role as communications company for Sweden.

Focussed marketing should highlight the sustainable options, at the same time as it cuts through the noise to our prioritised target groups. This is the only way we can do our part and succeed in our aim that by 2020 our target groups will view Sweden as a sustainable destination and that Swedish tourism industry sales will double.

24. UNWTO, World Tourism Barometer, Advance Release, January 2011 http://www.unwto.org/facts/eng/pdf/barometer/UNWTO_Barom11_1_key_trends_web_en.pdf

VisitSweden's mandate and organisation

VisitSweden's mandate involves international marketing with a dual focus. The first is image marketing of the brand Sweden. The second is product marketing of experiences and destinations. The mandate is fulfilled by way of VisitSweden's 250 annual market activities in 12 prioritised markets worldwide.

VisitSweden is owned in equal parts by the Swedish state through the Ministry of Enterprise, Energy and Communications, and Svensk Turism AB, which in turn is owned by the Swedish tourism industry. The basic operations and the image marketing i.e. the promotion of the brand Sweden, are financed by state funding. The Swedish tourism industry finances the marketing costs for its own products.

VisitSweden's mandate is formulated in guidelines from the state and based on expectations from the Swedish tourism industry. The guidelines specify a number of overarching targets for the operations.

For more information on VisitSweden's organisation and organisational profile, see appendices 1, 2 and 3.



Stakeholders – dialogue and collaboration the key to sustainable development

VisitSweden's mission presupposes an active and continual dialogue with our surroundings. Our role as a network builder means we have to match the right type of experiences in Sweden with the expectations of the international travellers we are focussed on. To succeed in this, we need to constantly improve our knowledge of these travellers, and to work closely with Swedish tourism to identify the experiences that arouse interest amidst tough international competition.

For this reason, our stakeholders are very important to us. Their know-how and, where applicable, local ties are a requirement for VisitSweden to do a good job. For instance the regional tourism organisations are a guarantee for retaining, refining and strengthening the engagement of the local tourism businesses, which in turn will secure their long-term growth. To create an active information flow about sustainable development, VisitSweden requires more information about the stakeholders, such as their knowledge of and approach to sustainability. This will enable us to fine-tune our operations, to advance the issue more effectively.

A key point of departure in the communication with potential visitors and others interested in Sweden is the brand platform for Sweden which VisitSweden has developed together with the other promotional bodies like the Swedish Trade Council, the Invest in Sweden Agency, the Swedish Institute and the Swedish Ministry for Foreign Affairs. The platform helps us communicate a uniform image of Sweden, and it acts as a filter for what we say and how we say it. Below we present²⁵ VisitSweden's most important stakeholders.

Visitors

VisitSweden's mandate requires profound knowledge and skill in communicating Sweden as an attractive destination to our potential visitors. To do this we carry out continual analyses in our 12 priority markets to keep ourselves updated on potential visitors' travel habits and opinions of Sweden²⁶.

This information forms the basis for how we prioritise our marketing. In communication with the visitor, not only do we promote the entire value chain of experiences, attractions, services and transport in and to Sweden, but we also convey a sense of what Sweden stands for. Based on the brand platform's core values, we communicate an authentic, caring, open and innovative country.

In an analysis of VisitSweden's prioritised target groups and their travel preferences, 13 per cent say that the purpose of their most recent trip to Sweden was to "visit family and friends". The same number specified "family holiday" as their main reason. Nine per cent said "outdoor experiences" and just below nine per cent said "city break"²⁷.

Owners

VisitSweden is half-owned by the Swedish state, through the Ministry of Enterprise, Energy and Communications, and half-owned by the Swedish tourism industry, through Svensk turism AB.

There is continual dialogue, firstly about the aims specified by the owners, and secondly regarding follow-up of the operations, for instance within the board of directors.



With Pathfinder Lapland, visitors can experience Sami culture. The tours are quality certified by Nature's Best.
Photo: Staffan Widstrand

25. VisitSweden's stakeholders were identified for VisitSweden's 2006 information plan, at an internal workshop based on accepted research into organisational and communication theory, including Bruzelius/Skärvad (*Integrerad organisationslära [Integrated organisational theory]*, 1995).

26. See appendix 4.

27. VisitSweden's target group analyses, 2011, VisitSweden/GfK.

Employees

VisitSweden is a knowledge company in the true sense and, as such, the bulk of our capital consists of our employees' talent and competence. Their inspiration, involvement, drive and satisfaction are vital in enabling VisitSweden to offer the creative communications solutions that constitute our core business. Equally important is that all employees are familiar with and are able to influence VisitSweden's aims and vision, and that they work to ensure that the brand platform's core values permeate everything they do.

The management's tools for achieving this include continual dialogue and communication, as well as follow-ups in the form of individual career development reviews and employee surveys. For instance, VisitSweden's internal conference in September 2008 included workshops where the employees could directly influence the company's business plan for the 2008-2011 period. Similarly, at various workshops since 2008 the employees have been able to influence the company's key values. Key values that reformulate the overarching brand platform for Sweden to core values that apply to VisitSweden's employees was completed in 2010.

In terms of sustainability, VisitSweden encourages the individual employee to consider the environment in their work, as well as in their private lives.

Partners

In a variety of ways, our partners represent the experiences, accommodation and transport that make up the entire chain of services that we jointly present to foreign visitors.

Regional tourism organisations and destinations

Swedish destinations are often represented by a regional tourism organisation. These organisations collaborate closely with VisitSweden in its communication with potential foreign visitors. They also function as our representative in our communication with tourism companies in the regions.

We have frequent and intimate dialogue regarding an array of joint campaigns and projects concerning the marketing of Sweden abroad, in particular when the region is involved in one of the partnership collaborations that VisitSweden is leading or participating in. In a survey on VisitSweden's sustainability report aimed at regional tourism organisations, roughly 77 per cent responded that it is important or very important that companies present their environmental impacts and commitments in a report. The same number say that they had a clear idea of VisitSweden's aims with regard to sustainability, after reading the 2009 report.

Companies in the Swedish tourism industry

VisitSweden maintains a close and continual dialogue with the companies in the Swedish tourism industry that are involved in international marketing activities. These companies can represent experiences (e.g. museums, activities or restaurants), accommodation (e.g. hotels, hostels, cabin villages or campsites) or transportation (e.g. airlines, ferry operators or rail companies). All are part of the destination Sweden. Good communication in terms of sustainability issues is essential, as these companies are often actively involved in the development of sustainable services and products.

Another type of company is the incoming travel company. They package the offers in Sweden (e.g. hotels and transfers combined with activities and food experiences) for foreign tour operators, so

they can offer additional Swedish experiences in their programmes. VisitSweden and the destinations in Sweden maintain an ongoing dialogue with the incoming operators regarding packaging of experiences aimed at specific target groups.

Companies outside the Swedish tourism industry

Companies that are not directly in the tourism industry can still benefit from foreign visitors to the country such as fuel companies, food stores and furniture producers. These can also include multi-nationals that want to make use of a Swedish profile. These companies, including IKEA, Wasabröd and Volvo, play an important role in boosting awareness of Sweden. To strengthen their significance for Swedish tourism and the positive effect of Destination Sweden on their brands, it is important to intensify the dialogue and to find forms of collaboration which allow both parties to benefit from joint advertising abroad.

Tour operators / travel agents

Tour operators and incentive houses with their retailers are important channels for packaging the correct experiences and reaching VisitSweden's target groups. VisitSweden aims primarily at tour operators and incentive houses for private travel and meeting travel, to inspire and establish contact with Swedish experience, transport and accommodation suppliers. Doing this requires continual dialogue on the operators' needs and the target groups' preferences and requirements, when they turn to the retailers for inspiration and bookings.



At the Scandic Rubinen Hotel in Gothenburg, the lamps are powered by wind and water power. An invisible but important part of long-term sustainability work.
Photo: Carl Swenson

Industry organisations, government agencies and other organisations in Sweden

The various spheres of interest are monitored and advanced by a range of interest groups, such as the Swedish Agency for Economic and Regional Growth, with regard to development issues, business and official tourism statistics, Svensk Turism AB, which is in charge of the national strategy for the tourism industry that was approved in 2010, and the Swedish Hotel and Restaurant Association, which, in its role as industry and employer organisation, monitors legislation and regulation in the tourism industry. VisitSweden also collaborates with the Swedish Travel and Tourist Industry Federation, a business organisation that conducts business and development projects for increased entrepreneurship. Other examples are organisations such as the Swedish Society of Crafts and Design, the Swedish Sami Federation and the Federation of Swedish Farmers. VisitSweden collaborates closely and maintains a continual dialogue with these organisations regarding a range of issues, and each of them contributes with their know-how, for continued progress.

Council for the Promotion of Sweden

The other organisations in the Council for the Promotion of Sweden Abroad (Swedish Trade Council, Invest Sweden, Swedish Institute, Ministry for Foreign Affairs and Ministry of Enterprise, Energy and Communications together with VisitSweden) are very important partners in our common objective of promoting the image of Sweden overseas, and through joint projects and regular consultation we maintain an ongoing dialogue. Starting with the shared brand platform, we can join forces to build a credible image of Sweden that will drive the development of sustainable thinking in its own right. The council's member organisations also have a variety of common tools to strengthen Sweden's image abroad, such as www.sweden.se (the official website for Sweden) and Image Bank Sweden.

Swedish media

The media in Sweden plays a key role in spreading awareness of VisitSweden's mandate and operations overseas, and of the significance of tourism as an important export industry. Because VisitSwe-

den uses most of the state and tourism industry resources outside the country's borders, industry media (for the tourism and communication industries), national and local media throughout Sweden are a vital channel for reaching the other Swedish stakeholders.

Foreign media

Foreign journalists and bloggers, with their independent evaluation of Sweden, constitute a credible channel for the message of Sweden and an effective way of reaching VisitSweden's target groups. VisitSweden aims to establish an ongoing dialogue, to anticipate journalists' needs and to facilitate their work, which takes place by way of personal contacts, newsletters and sponsored travel for the media. Some 600 such visits to Sweden are made every year, focussing on aspects like environmental sustainability and Swedish lifestyle.

Suppliers

For VisitSweden, suppliers play a key role in terms of boosting sustainability. VisitSweden has started to place demands on suppliers to prioritise sustainable solutions at every level, and in future wants to do this in a more structured manner. For instance, in our day-to-day contact with office supplies businesses, advertising agencies, media agencies, analysis companies, event agencies and transporters we want to work with clarity and forward planning.

Society

A well-developed tourism industry benefits society at all levels: financially through increased employment and revenue to the state, municipalities and companies; and socially by way of vibrant communities throughout the country, increased attractiveness and improved infrastructure. This assumes a balance between the visitors' environmental impact and the ability of nature to recover. When Swedish residents perceive that 'their' Sweden has desirable attractions and destinations, good infrastructure and services etc, their social quality of life increases. And there is a corresponding duty to provide an attractive destination with good infrastructure that meets the visitors' needs, if one chooses to sell the destination in international markets.



In Stockholm, Gothenburg and Malmö you're never far from great outdoor experiences. The combination of pulse and a harmonious lifestyle is uniquely Swedish.
Photo: Nicho Södling

VisitSweden's sustainability work

VisitSweden sees many opportunities for influencing the world around us from an environmental, economic and social point of view. There are numerous factors that affect travel to Sweden and the development of experiences for international visitors. Here we are firm believers in VisitSweden's capacity to build bridges between the international demand for sustainable experiences and the Swedish supply. With the roughly 250 campaigns and projects, and 1,500 marketing activities conducted by VisitSweden abroad every year, VisitSweden and the Swedish tourism industry influence business and leisure travellers both directly and indirectly by way of foreign media, tour operators, agents and incentive houses for the meeting industry.

Sustainability one of seven key strategies for 2010

VisitSweden's work is based on seven overarching strategies. These form the basis of all international marketing of the destination Sweden. For 2010 the focus was the strategy for sustainable tourism, which will result in VisitSweden being better at promoting sustainable growth in the Swedish tourism industry. The strategy for sustainable tourism is about highlighting and communicating sustainable experiences in Sweden (to attract visitors), encouraging the industry to choose sustainable solutions, getting involved in the international debate and, as an obvious point of departure, being a responsible business.

In the guidelines for VisitSweden's operations, its owner, the Swedish state, identifies sustainability as an important part of the company's overarching aim. The Swedish Ministry of Enterprise, Energy and Communications also identified sustainability as an area of special focus in the extra funding for VisitSweden that were finalised in autumn 2009²⁸.

In 2010 VisitSweden has produced an overarching strategy and vision for sustainability, and has developed and launched a communications strategy for messages that strengthen the image of Sweden from a sustainability point of view. The communications strategy was presented to the Swedish tourism industry in October.

VisitSweden has also continued its efforts to structure and involve its own organisation in sustainability. In 2010 VisitSweden began work on a plan of action for sustainable tourism that will result in the strategy for sustainable tourism becoming concrete action.

OVERARCHING STRATEGY FOR SUSTAINABLE TOURISM

VisitSweden will:

- encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly
- feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences
- promote and engage in sustainability issues at company, national and international levels.

VisitSweden gets its own house in order

As a service company VisitSweden has no mandate to determine how businesses and organisations in the Swedish tourism industry develop sustainable tourism. But reducing its own impact is a given, and in 2010 we continued to take several important steps to minimise how we affect the environment. For instance, for all our offices we continue to calculate the impact of carbon dioxide emissions from electricity and heating, as well as from our business travel. It's these factors that make up the majority of VisitSweden's environmental impact. We have also begun to carbon-offset large events, both in Sweden and overseas. Because we offset our environmental impact by way of certified climate projects, the entire company is climate neutral. Since 2009 VisitSweden has been a member of the Global Compact (see appendix 5) and the UN climate programme Caring for Climate.

Growth and continued focus on sustainability

The risks and opportunities identified by VisitSweden (see pages 8-9) show much potential for increased travel to Sweden, while retaining focus on sustainability. With VisitSweden's communications strategy for international marketing, we can strengthen the image of Sweden by way of optimistic messages that highlight a broad, attractive range of internationally competitive, sustainable experiences.



At VisitSweden's Culinary Academy of Sweden in western Sweden in September 2009, foreign travel operators and journalists got to fish and cook together with local experts. VisitSweden's Academies of Sweden concept is an advanced form of familiarisation trip with strong sustainable components. Photo: Fredrik Broman

²⁸ Swedish government Budget Bill, 2009 <http://regeringen.se/sb/d/11453/a/131716>

VisitSweden's sustainability strategy: inspire the visitor

- *encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly*
- *feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences*
- *promote and engage in sustainability issues at company, national and international levels.*

STAKEHOLDERS
The Global Traveller
The Global Company

Inspiring our visitors

VisitSweden can encourage and inspire visitors from other countries to travel responsibly to and within Sweden, by showing the opportunities for sustainable experiences that the country offers. When VisitSweden communicates with foreign travellers, this is done mainly via digital channels. However, considering the media behaviour of the target group, we may choose other channels, such as printed matter, TV or outdoor advertising, or indirectly through PR and tour operators and agents in the meeting industry. The choice depends on what we feel best suits the message and the target group we want to reach.

What motivates the visitors

Generally, for the Global Traveller who has already visited Sweden, the main motivators are to relax and avoid the daily routines, followed by having fun and experiencing new things, and being curious about new places and cities, i.e. they want new impressions in their lives. After that comes enjoying good food and drink, experiencing nature and sun, heat and good weather, as shown in the figure below.



Source: VisitSweden/GfK 2011. Base: The Global Traveller who travels to Sweden (597) Question: How important is each of the following things to your holiday travel?

Travel patterns to Sweden

There are a number of factors that influence the decision to travel to a particular destination. Among visitors to Sweden in 2010, the two most common factors were visits to family and friends, and family holiday. Nature-related experiences during the snow-free season and city breaks were the next two most important reasons for visiting Sweden.

It is the globally aware, well-traveller people looking for new, exciting destinations who represent the greatest potential for increased travel to Sweden. Through ongoing analyses of the target groups we also get a lot of information on their attitude to sustainability. This enables us and our partners in the Swedish tourism industry to adapt our offer to the wishes of the potential travellers.

Analyses of 11 of VisitSweden's 12 prioritised markets show the attitudes of private travellers to environmental issues in travel. Results indicate among other things that roughly 20 per cent of the respondents already show concern for the environment, while almost 25 per cent say that concern for the environment has not or will not affect their choice of holiday destination²⁹. Of those who state that they already show concern for the environment, 45 per cent say it is not easy to find eco-friendly options when planning a trip.

Consumer surveys in recent years indicate increasing interest in environmental issues and climate change. Consumers are increasingly aware of their role in helping the future environment, but are not yet prepared to pay more or take far-reaching action. Rather, they feel it is the duty of the supplier to be eco-friendly by developing sustainable products and experiences³⁰.

For the companies, CSR issues are increasingly important, which means they place greater demands for sustainability when purchasing services and experiences, and that they are more cautious about being associated with activities that can be perceived as at variance with CSR.

Clear, joint messages strengthen Sweden's position

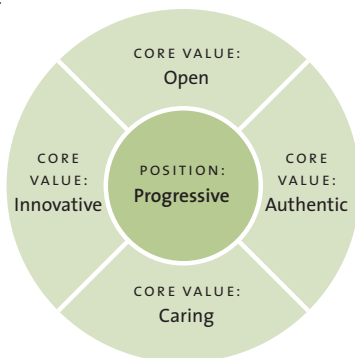
In all communication with potential visitors, VisitSweden's starting point is a joint brand platform, developed together with the other organisations in the Council for the Promotion of Sweden (Swedish Trade Council, Invest Sweden, Swedish Institute, Ministry for Foreign Affairs and Ministry of Enterprise, Energy and Communications).

29. VisitSweden's target group analyses, 2011, VisitSweden/GfK

30. Special Barometer 295/wave 62.2 – TNS opinion & social, March 2008: Attitudes of European Citizens towards the Environment. Interviews of 27,000 respondents (1,000 per EU country), with selected results as follows:

- 96 per cent feel that it is important to protect the environment
- 86 per cent see themselves as individuals who can play a part in protecting the environment in their countries
- 75 per cent are prepared to buy environmentally friendly products, even if they cost a little more. However only 17 per cent actually buy such products.

The platform is a tool to ensure that the organisations are pulling in the same direction in their marketing of Sweden – that they're creating a position based on progressiveness. Swedish-style progressiveness is based on a dynamic balance between soft, human values and the groundbreaking and innovative. With the four core values, Innovative, Open, Caring, Authentic, the messages take on a more concrete form.



VisitSweden has developed the brand platform for Sweden by creating messages that are specially adapted to the target groups we are aiming at. This resulted in a strategic concept, the positioning themes, that simplify, focus and strengthen the messages about Sweden as a destination. With the guidance of the positioning themes, we can better group what is on offer in Sweden, to match the needs of the target groups. This means we will highlight fewer main messages about Sweden and be more consistent over time.

Sweden is associated strongly with nature and creativity. These two dynamic, attractive aspects of Sweden form a basis in the image of Sweden, even when we want to promote sustainable experiences. Since Sweden is considered a country that takes environmental issues seriously, it reinforces the perception of Sweden as a progressive country and gives us a competitive advantage over other destinations. The messages about Sweden, being based on the brand platform and the positioning themes, support sustainable development through their focus on gradual, long-term development that takes into consideration the wellbeing of people and nature.

For VisitSweden's communication on sustainable travel, the brand platform works as a filter.

Innovative – sustainable experiences can mean new ways of travel.

Caring – consuming sustainable experiences shows consideration for people and nature.

Open – in Sweden we try to live as we learn, but we are not perfect.

Authentic – Swedes care about the environment and see the environment as a source of mental and physical wellbeing.

The four positioning themes are:

Urban Nature

Urban life in Swedish cities provides a unique combination of dynamic creativity and a harmonious, natural lifestyle. This theme summarises the unique aspects of experiences in the Swedish cities of Stockholm, Gothenburg and Malmö.

Natural Playground

Active togetherness in natural settings. In Sweden you have a unique opportunity to move about freely in the countryside, in harmony

with and learning from nature. And with challenges that combine action, play, imagination and adventure with simplicity, cosiness and authenticity.

Swedish Lifestyle

In-depth experiences of Swedish culture and lifestyle. Everything from design, history and traditions to encounters with locals can inform visitors about contemporary Sweden and its origins. About a culture that's natural, simple, sustainable and respectful while also open-minded, curious and innovative.

Vitalised Meetings

'Vitalised Meetings' combines playfulness and enterprise with harmony and uncomplicated experiences in natural environments. Meetings in Sweden vitalise the individual's thinking and show the way to sustainable values.

Quality certification

VisitSweden is one of the three companies behind the first ecotourism label in the northern hemisphere, Nature's Best, which was launched in 2002. VisitSweden and the Swedish Society for Nature Conservation, under the leadership of the Swedish Ecotourism Society, have to date certified more than 240 activities from more than 80 operators in Sweden, which meet the strict requirements for environmental, financial and social impacts. The certification committee, where VisitSweden is a member, meets regularly to approve the scrutinised activities. Many other countries have since developed similar accreditation systems for ecotourism. VisitSweden's aim is to promote this shift, so that more tourism industry players can be integrated into existing or new classification systems, with the objective of being able to deliver straightforward, credible messages about sustainable and accredited experiences in Sweden to international visitors. Indeed, according to a questionnaire 25% of European national tourist organisations³¹ feel that quality certification based on various classification systems is an important strategy in the promotion of sustainable tourism.



Log rafting with Vildmark i Värmland has been certified by Nature's best since 2002. Using just logs and ropes, the guests build their own raft and drift down the Klarälven river at its own pace. Photo: Vildmark i Värmland

31. What role should European NTOs play on climate issues?, Questionnaire among European ETC members, July 2008

Choices and success factors in the short term

To motivate visitors to travel responsibly and to show how they can visit Sweden in a responsible way, VisitSweden wants to:

- develop a communications strategy with facts and arguments that strengthen VisitSweden's positioning themes
- facilitate for visitors to make sustainable decisions when planning their trip
- increase awareness of the business benefits of sustainable behaviour, e.g. by highlighting good examples

What has VisitSweden done?

Examples of activities carried out in 2010

VisitSweden is in the introductory phase of more structured sustainability work, and has developed an overarching strategy and vision, as well as a strategy for how sustainable messages should be communicated.

Additionally, in 2010 several locally initiated activities were conducted at the foreign and head offices.

- Communications strategy

VisitSweden has developed a strategy for communicating sustainability to the prioritised target groups, the Global Traveller and the Global Company. The messages convey a belief in the future that engages the target group's positive attitude to the future, and that highlights the competitive and sustainable experiences found in Sweden.

The main message is "We dare believe in a beautiful world".

This is supported by three sub-messages: A conscious choice is easy, Learn from nature and Progressive hospitality.

With these messages we show that Sweden is at the forefront in creating an attractive destination where sustainability is valued and forms the foundation for the visitor's stay.

"A conscious choice is easy"

What does it mean?

For the target group, this message is more a pre-requisite than something that triggers their primary motivation. By making conscious choices you contribute to a Beautiful world. For this reason, these choices must be easy to make!

Choosing eco-friendly options is often very conscious. The target group's choices are good reflections of the desire for a healthy, sustainable existence. They are very aware of the consequences of consumer behaviour. They believe in the individual's ability to bring about greater social and environmental results.

What do we want to happen?

By:

- highlighting the products and services that have certification
 - featuring sustainable events and meetings
 - explaining all the options for making conscious choices
- we make it easy for the environmentally aware Global Traveller and the Global Company to select Swedish experiences rather than competitors' options. It's easier to make conscious choices.

"Learn from nature"

What does it mean?

For the environmentally aware Global Traveller

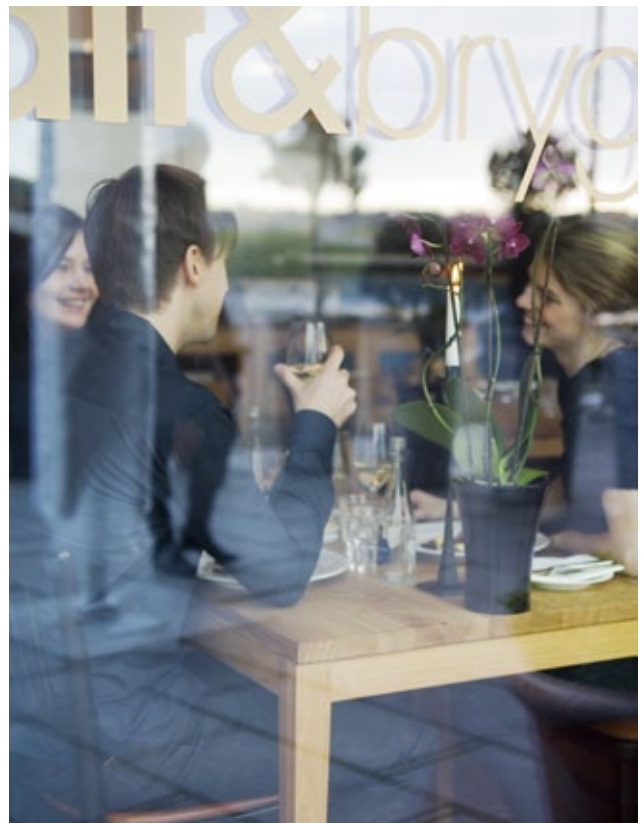
The motivation to experience nature and to learn new things is greater than for the normal Global Traveller. Destination Sweden has lots to offer; it meets the demand with attractive offerings. The sub-message "Learn from nature" is about learning your place in the natural cycle and it attracts a conscious target group.

For the Global Traveller

This group is motivated by a desire to experience nature and its diversity with educational activities, the four seasons, which many in the group have not experienced, as well as places in our modern cities. Additionally, food experiences as part of an educational activity, whether in natural settings or not.

What do we want to happen?

We want the target group to be attracted by the message, to learn and to spread it around. The trip should increase their knowledge of Sweden as a sustainable destination and we want them to benefit from the varied knowledge they acquire. Also, they should talk about Sweden and influence others in the same direction. In this way they are part of the visionary thinking in our main message, "We dare believe in a beautiful world".



Restaurang Salt & Brygga in Malmö serves ingredients from local organic producers. Certified organic coffee, tea, wine and beer, plus interiors made of recyclable and non-allergenic natural materials are other examples of a thoroughly green profile. Photo: Miriam Preis

*“Progressive hospitality”**What does it mean*

In Sweden, when we have visitors from other parts of the world, our starting point is the person and the environment. This influences both how we receive the environmentally aware Global Traveller and the Global Company. We base our hospitality on three foundations that are characteristics of a beautiful world: Security, Trust and Tolerance.

Security

Through openness, innovation and consideration, a society is created with the aim that everyone has a place and feels welcome. This development goes hand in hand with sustainability. A desire for balance. The human, soft and ethical, balanced with the innovative and ground-breaking.

Trust

Having trust in oneself and others. Giving others a look into public decision-making processes, and respecting nature that is accessible to everyone are concepts that originate in long-term thinking.

Tolerance

Sweden pays a lot of attention to ethical values such as equality, sustainable development and human rights. A healthy work-life balance and paternity leave are good examples of this. Also, a desire for participation, equality and consensus create balance in society.

What do we want to happen?

The target groups should be aware of the opportunities and freedoms offered by our Right of Public Access, and of our tolerance of various sexual orientations. This helps lower the threshold for first-time travel to Sweden, and creates a secure, welcoming and positive impression of Sweden that leads to return visits.

Since VisitSweden includes ethical values in its communication, and since we show how the target group's consumer behaviour affects people and not just the environment, we show how, together with the target group, we “dare believe in a beautiful world”.

- International PR

In 2010 VisitSweden's efforts to inspire foreign journalists resulted in more than 3,000 articles in newspapers and magazines, in nine markets. The connection between Swedish lifestyle and nature is a key component in the journalists' description of Sweden. A specific interest in ecotourism and a general green attitude is increasingly evident. Of the more than 600 sponsored trips that VisitSweden conducted in 2010 together with regional tourism councils and tourism companies in Sweden, a number resulted in articles about sustainable experiences in Sweden. During 2010, more than 100 articles covered topics directly related to sustainability. Of these, 23 appeared in French media. Topics related to sustainability in a broad sense, such as untouched nature, Public Right of Access, Swedish food and

lifestyle, were described in 40% or 1,250 of the articles. This is shown in a VisitSweden report³². Stockholm Green Capital received a lot of attention, with numerous follow-up articles on eco-travel and green destinations. Finnish journalists took a sustainability-themed trip in conjunction with Stockholm Visitors Board. The trip was carbon-offset by supporting the work of Skärgårdstiftelsen. In 2010 the initial work was done for an exclusively eco-themed press trip to Stockholm, again for Finnish journalists – the trip took place in March 2011. Eco-travel and green experiences are considered one of the strong growth areas for the years to come. Media consumers are increasingly aware and want to travel with a good conscience, whether in the city or the countryside.

VisitSweden's Danish office sees a trend where journalists on press trips to Sweden increasingly travel sustainably, e.g. to Stockholm and Gothenburg. In several articles about the Handball World Championships in Malmö, Danish newspapers suggested taking the train to the arena, following a tip from VisitSweden.

- Digital marketing and campaigns

VisitSweden's 250 campaigns and projects are increasingly concentrated on the internet and on various social forums, rather than via more traditional, environmentally resource-hungry marketing channels such as printed matter. The visitSweden.com website is the base for the general information on Sweden, and for various campaigns for selected target groups VisitSweden often creates special campaign websites. Visitors to visitSweden.com can leaf through digital versions of all the main brochures, which reduces the need to print and distribute large editions.

On the English, Russian and Italian versions of visitSweden.com VisitSweden presents tips and inspiration on how to experience Sweden in a sustainable manner.

Examples of digital campaigns are Faces of Scandinavia (USA), 100% Echt (Germany) and Swedish Cities at www.visitSweden.com/citybreak (UK and Italy). In VisitSweden's digital campaign aimed at older German travellers, 100% Echt, train and boat transport were featured more than air. At VisitSweden's Danish office, planning has commenced to make the company's sites about Sweden for Danes carbon-neutral.

- Academy of Sweden

VisitSweden's concept for familiarisation trips, Academy of Sweden, takes place every year, with two themes: Academy of Sweden – Culinary and Academy of Sweden – Outdoor. The trips are based on the core values from Sweden's brand platform: Innovative, Open, Caring, Authentic. Respect for nature and primary produce and a clear connection to Swedish heritage are key features.

The programme often includes a Nature's Best certified activity, and the food is produced locally. The participants at the academies include journalists and tour operators, and at the outdoor academies there are also retailers of outdoor equipment. After a five-day programme they are appointed academy ambassadors of Sweden.

To date, eleven Outdoor Academies and three Culinary Academies have been held – one of each type in 2010. VisitSweden's aim is to minimise the environmental impacts of the academies, and those that do occur are offset.

32. Sweden as a destination in foreign media in 2010. Report categorising the results of VisitSweden's international PR work in various themes.

- Climate-neutral events

VisitSweden organises several events aimed directly or indirectly at foreign visitors. In 2010 a model was developed for offsetting VisitSweden events in Sweden and in the foreign markets. The aim is to offset at least two events per foreign market, starting 2011, in accordance with requirements for “climate-neutral events” (large events) or by way of standardised calculations (smaller events).

VisitSweden’s participation at the World Travel Market in London was carbon offset already in 2010. At this trade fair, one of the world’s largest, VisitSweden has extensive contact with tour operators, journalists and other important actors, who have a huge effect on the marketing of experiences in Sweden.

- The Sweden Magazine

VisitSweden’s magazine “Sweden” is printed in 710,000 copies in nine languages using eco-certified printing technology on chlorine-free paper from FSC pulp. The magazine is distributed to the potential travellers who are judged to be interested in travel to Sweden. This prevents the printing of excess copies. All nine editions include a spread with tips for eco-tourism experiences from eight Nature’s Best certified companies.

For the Danish market, VisitSweden produces another version of the Sweden magazine, which comes out four times per year, with a circulation of between 300,000 and 500,000 copies. The 2011 issues were carbon offset and environmental impacts were minimized (e.g. printing on FSC-certified paper).

- Swedish Workshop

Swedish Workshop, VisitSweden’s recurring meeting place for Sweden’s tourism industry and foreign tour operators, aimed at generating new contacts and business, was held in Stockholm in 2010. Participants included 120 tour operators from 14 countries, and 86 salespeople from the Swedish tourism industry. Where possible, eco-friendly options were chosen, e.g. for choice of venues, food, transport, accommodation etc.

- Collaboration with tour operators and agents

Sustainability is also an important component when our intermediary agents work to persuade tour operators and companies to hold meetings and conferences in Sweden. For instance VisitSweden’s Paris office ensures that at larger meetings all participants travel by public transport. VisitSweden’s UK office is discussing how to encourage tour operators and other actors to consider sustainability issues when planning their destinations. For instance by including sustainable experiences in their travel programmes, reducing the number of travel catalogues and other printed materials, and focussing on air transport with modern planes.

At the EIBTM trade fair, where tour operators and agents from get together, VisitSweden’s stand won the fair’s environmental prize. The EIBTM and IMEX fairs were carbon-offset by way of the fairs’ own systems.



<< Genuine Kalix Löjrom is found only in the northwestern Gulf of Bothnia, where the clean brackish water offers perfect conditions. This vendace roe is the first foodstuff in Sweden to receive the EU’s Protected Designation of Origin.
Photo: Magnus Skoglöf



>> Bondens Egen Marknad, a farmers’ market located at some 20 places in Sweden, features locally produced food and specialties. Swedish root vegetables are smart environmental choices.
Photo: Lars-Olof Swartz/
Bondens Egen Marknad

VisitSweden's sustainability strategy: motivate the tourism industry

- encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly
- feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences
- promote and engage in sustainability issues at company, national and international levels.

STAKEHOLDERS

Partners
Industry organisations
Swedish media

Inspiring our partners

In its role as a link between foreign visitors and all the various experiences available in Sweden, VisitSweden sees huge potential in presenting good examples of sustainable travel to tourism companies, regions and organisations. To a greater or lesser degree, every Swedish region works with sustainable development. The organisations are eager for VisitSweden to help to advance this trend, provided the target groups express a desire for sustainable experiences.

Dialogue with the regional tourism organisations and the rest of the Swedish tourism industry, as well as with the owners, has greatly influenced the development of VisitSweden's sustainability work. An important point of departure in all of VisitSweden's communication is an understanding of the target groups' knowledge of and attitude to sustainable travel. For this reason we measure this in annual target group analyses and spread the information to our partners as well.

Also in the target group analyses that include the respondents' travel during 2010 we have asked questions about travel behaviour with regard to sustainability. The analyses were conducted in all of VisitSweden's 12 prioritised markets. For instance there were questions on environmental care when selecting a holiday destination and if people think it's easy to find eco-friendly options. In collaborations with VisitSweden, companies and organisations in the Swedish tourism industry are informed of these results and can use them in their own marketing decisions.

Choices and success factors in the short term

To highlight good examples in marketing, and consequently to motivate the tourism industry to develop additional sustainable products and experiences, VisitSweden wants to:

- Make clear the business benefits, using stories and best practice, to increase awareness of the business benefits of sustainable actions.
- Start a partnership on the theme of sustainability, with regional tourism organisations. The focus will be on market communication of sustainable Sweden.
- Start a process for marketing campaigns on sustainability with commercial actors (2011-2012). Implement at least one campaign during 2011.

What has VisitSweden done?

Examples of activities carried out in 2010:

- Communications strategy, a tool for Swedish tourism industry

VisitSweden has developed a strategy for communicating sustainability to the prioritised target groups, the Global Traveller and the Global Company. The messages convey a belief in the future that engages the target group's positive attitude to the future, and that highlights the competitive and sustainable experiences found in Sweden. The main message is "We dare believe in a beautiful world". This strategy gives VisitSweden and its partners a platform for sustainable messages. The more the image of Sweden as a sustainable destination is spread, the better – and with a joint communications platform the messages are better coordinated and consequently more powerful.

- Inspiration Day for tourism industry

In October 2010 VisitSweden organised a full-day event for the Swedish tourism industry and other partners, aimed at inspiring and increasing awareness of sustainability in the Swedish tourism industry. The main purpose was to present VisitSweden's communications strategy for sustainability. One of the regions in Sweden, Örebro County, got to explain how they have developed their sustainability work and what it has meant for their operations. Some 200 participants attended, and the event was carbon-offset.

- Climate donor for TUR 2010

VisitSweden's participation with a stand at the TUR 2010 travel fair in Gothenburg was carbon-offset via the programme "Climate donor TUR 2010". The climate contribution was invested in one of the Carbon Neutral Company's carbon-offset projects.

- Climate measurement tool, Svante

VisitSweden offers all its partners the free use of the tool Svante, to calculate their travel-related environmental impacts. The reason for this is to encourage measurement and offsetting of impacts. In 2010 a handful of companies and organisations in the Swedish tourism industry expressed interest in the Svante tool.

- Pilot project: Sustainable tourism industry

The West Sweden Tourist Board and the Swedish Agency for Economic and Regional Growth are running a pilot project within the project "Sustainable tourism industry", which is a national campaign to establish a quality and sustainability system that supports the tourism industry throughout Sweden. VisitSweden is part of the steering group. The regions of Jämtland/Härjedalen, Skåne, Småland and Södermanland/Västmanland are also participating in the pilot project. VisitScotland is the international partner.

- Climate-neutral events

In 2010 VisitSweden developed guidelines and instructions for how the company should carbon-offset events in Sweden and in foreign markets. By participating in these events the tourism industry is offered a platform for carbon-offsetting. The aim of the guidelines and the offsetting itself is to encourage international visitors, Swedish tourism industry and other partners to make Destination Sweden more sustainable.

- Sustainability on the agenda

In regular meetings with decision-makers from the regional tourism boards in Sweden, sustainable development is a recurring topic of discussion. Sustainability is a standing item on the agenda at VisitSweden's management and board meetings.



Swedish agriculture has a long record of caring for people, animals and nature, thus contributing to sustainable methods. Photo: Ulf Huett Nilsson



Stockholm was chosen as Europe's 2010 environmental capital by the European Commission, in part for making green issues a natural part of the city's daily work, and because Stockholm has reduced its CO₂ emissions by 25 per cent since 1990. Photo: Jeppe Wikström

VisitSweden's sustainability strategy: VisitSweden's own engagement

- *encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly*
- *feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences*
- ***promote and engage in sustainability issues at company, national and international levels.***

VisitSweden's external and internal engagement

Sweden should work to advance sustainability issues within international networks for tourism, in order to take advantage of knowledge from other countries' national tourism councils.

For instance in 2008 VisitSweden campaigned for sustainability issues in the European Travel Commission (ETC), the organisation for the European national tourist boards and offices. As a result of this, in the autumn of 2009 Sweden hosted the ETC and World Tourism Organisation (UNWTO) first international symposium on 'Tourism & Travel in the Green Economy'. The purpose of the symposium was to reach a common stance for the tourism industry in Europe and the European countries' national tourism organisations, which in brief is based on the main message of the Davos Declaration, to adapt, mitigate and apply new technology with the aim of managing climate impact³³.

The knowledge exchange within the ETC also concerns development issues such as market analysis, statistics, travel trends and business intelligence, issues that are closely linked with the financial development of tourism.

VisitSweden also participates actively in the national discussion on sustainability and tourism, e.g. as a speaker at seminars. Common and recurrent themes of the communication with owners, partners, media and other actors in Sweden include tourism's role as a new primary industry in Sweden; foreign visitors' demand for exotic, unusual and educational experiences and how Sweden can respond to this; and how environmental care can strengthen the image of Sweden.

VisitSweden conducts continuous monitoring and development of opportunities regarding environmental, economic and social aspects of sustainability.

VisitSweden's employees are passionate about sustainability issues and they often put forward suggestions for eco-friendly procedures. VisitSweden wants to boost this behaviour.

Choices and success factors in the short term

In order to promote and engage itself in sustainability issues at company, national and international levels, VisitSweden wants to:

- monitor relevant sustainability work, at national and international levels
- take part in prioritised activities and projects
- have an active role in the West Sweden Tourist Board's pilot project "Sustainable tourism industry" together with Swedish Agency for Economic and Regional Growth etc

STAKEHOLDERS

Partners

Industry organisations, government agencies, other organisations in Sweden

Owners

Swedish media

Employees

Suppliers

Society

What has VisitSweden done?

Examples of activities carried out in 2010:

- The sustainability discussion

Staff from VisitSweden are frequent participants in seminars and meetings, and are involved in the media discussion of economic, social and environmental sustainability. Tourism's financial and environmental effects on society are recurrent themes.

- The Nature's Best Certification Committee

VisitSweden has been a member of the Nature's Best certification committee since the start. Getting involved so early adds an international perspective already at the certification stage, which improves the chances of the company succeeding in an internationally competitive market.

- Sponsorship

VisitSweden is a bronze sponsor for the Swedish Society for Nature Conservation (8,000 SEK).

- The Climate Hunt

VisitSweden took part in The Climate Hunt, a national web-based knowledge competition for companies and organisations in Sweden, aimed at increasing awareness of energy-saving and eco-friendly behaviour. Five VisitSweden employees participated, and finished in fifth place. All employees were invited to take part in the knowledge gathering exercise that preceded the competition.

- Internal training

At VisitSweden's internal conference, all employees received training in sustainability issues in conjunction with the launch of VisitSweden's communications strategy for sustainability, and a representative from Arlanda Airport spoke about the airport's environmental efforts.

- Climate measurement tool, Svante

VisitSweden uses Svante to calculate environmental impacts from all employees, relating to electricity, heating and travel. This also encourages the staff to make sustainable transport choices in their private lives.

- Development of sustainability by tour operators and agents

VisitSweden's staff in charge of retail (tour operators and agents) have held internal workshops aimed at generating ideas and activities for promoting the issue with retailers of experiences in Sweden, including e.g. SWOT analyses.

33. <http://www.unwto.org/pdf/pro71046.pdf>

VisitSweden's own environmental impacts

For VisitSweden there's no question that we must keep our own house in order. Carbon dioxide emissions from electricity, heating and business travel make up the largest part of VisitSweden's environmental footprint. Based on calculations of our impacts, and climate offsetting, the entire company has been climate neutral since 2009³⁴. The most current challenge for VisitSweden is to focus on the environment, as we operate in a country that has been devoted to social and economic security for many years.

Sustainability and environmental policy

VisitSweden will encourage international visitors, the Swedish tourism industry and other partners to contribute to a more long-term sustainable development of Destination Sweden, while we also endeavour to reduce our own climate impacts. The key words in VisitSweden's sustainability efforts are business benefits, social engagement and environmental leadership. The sustainability efforts will be characterised by openness and caring with regard to employees, visitors, partners, society and media. We will maintain an active dialogue with and place demands on partners and suppliers, and encourage potential visitors to make sustainable choices.

We will do this by:

- increasing knowledge and awareness of green issues among all employees
- influencing, making demands and collaborating with other companies, suppliers, agencies and organisations in sustainability issues
- viewing measures that improve the environment as investments
- striving to minimise our own environmental impacts within the company, by prioritising eco-certified products and services, and by efficient use of resources
- continually aiming to make better use of our resources within the company
- making available a sustainable selection throughout our website, both for visitors and partners
- managers ensure that sustainability and environmental policy are followed and make use of employees' ideas and suggestions

To ensure we follow sustainable practices in everything we do, we use the following filter:

- Will the environment be affected by this activity/action?
- What can be minimised? It's important to take a stand and make the strategically necessary choices to minimise impacts.

VisitSweden's own environmental impacts

Being a service company, VisitSweden's own environmental impact is limited. But to maintain credibility it is important that we behave according to sustainable principles. This is why in 2010 VisitSweden intensified the work commenced in 2008, for instance measuring impacts and identifying measures to reduce direct and indirect carbon dioxide emissions resulting from its own business.

We have already identified electricity use and heating of our offices, plus our own business travel, as the main factors affecting the environment. Consequently we continue to measure the total effect of these factors in 2010, measured in tonnes of carbon dioxide emissions. By identifying the extent of our impacts, VisitSweden can identify ways to control and reduce emissions.

This year we have offset the emissions generated by all foreign offices, except for Japan and China. In 2010 VisitSweden left a mark on the environment corresponding to emissions of roughly 583 tonnes of CO₂, of which 513 tonnes came from business travel. In 2010 we reduced our impacts by over 23 per cent³⁵, compared to 2009. This increase is mainly a result of business travel.

It is still clear that air travel represents a substantial part of VisitSweden's environmental impacts, and this is also where the greatest increase (21%) has occurred. Train travel has decreased by 15%, but from a considerably lower level. VisitSweden's electricity consumption totalled 152.6 MWh, of which more than 75.5 MWh was renewable (where 5.6 MWh was wind power purchased for VisitSweden's German office and 69.9 MWh for VisitSweden's head office in Stockholm). Consumption of heating totalled just over 170.4 MWh. This corresponds to a total climate impact (for electricity and heating) of almost 70 tonnes of carbon dioxide. Carbon offsets were purchased totalling SEK 122,430, corresponding to VisitSweden's total emissions of nearly 583 tonnes of CO₂. The total cost and investment for environmental protection refers only to costs for carbon-offsetting. There are also costs for purchase of goods for the office, such as organic food and eco-friendly office supplies, but these are difficult to account for separately.

VisitSweden will carbon-offset by way of a CDM (Clean Development Mechanism) project in Kethapally Village, India. This project, Gayatri Agro, aims to produce biomass-based electricity at plant that is powered by agricultural residue, such as husks and stalks from rice, sugar cane and legumes. The project involves a shift from fossil fuels and helps stabilise the local electricity network. In total the project saves about 21,000 tonnes of CO₂ per year³⁶.

34. See Appendix 6 for conditions for becoming a climate-neutral company.

35. VisitSweden has employed new staff and opened offices abroad during the year, which has direct effects as a result of additional heating, electricity consumption and travel, but also because of travel related to induction programmes and a generally higher activity level within the company.

36. The project has also created some 400 new jobs for locals. The project owner is continually involved in the local community, e.g. by supplying study materials, food and hygiene facilities to the local schools, and drinking water and fruit trees to the population. Also a school has been sponsored and land transferred, to build a hostel for schoolchildren, enabling children from neighbouring villages to attend school.

Climate measurement with the Svante tool

In our sustainability work we use the climate tool “Svante” to facilitate calculation and reporting of our internal climate impacts.

VisitSweden's CO ₂ emissions (tonnes)	2008	2009	2010	Change 2009-2010	Emissions per employee 2010 (average)
Climate impact from purchased electricity and heating	59.61	45.18	69.64	54.14%	0.98
Of which electricity	43.39	26.53	73.92	178.62%	1.04
Of which green electricity	0.0049	0.0015	0.0025	66.67%	0.00004
Of which district heating	16.22	18.64	16.53	-11.32%	0.23
Gas	–	–	15.74	100%	0.22
Indirect environmental impact. business travel*	639.81	426.39	513.16	20.35%	7.22
Of which air travel	618.48	403.99	490.04	21.30%	6.90
– Trips <450 km	56.08	41.85	51.41	22.84%	0.72
– Trips 450-1600 km	281.24	201.90	256.97	27.28%	3.61
– Trips >1600 km	281.16	160.27	180.53	12.64%	2.54
Of which train travel	3.79	3.12	2.63	-15.68%	0.03
Of which bus travel	0.019	0.26	0.48	84.17%	0.006
Of which rental car, taxi and private vehicle	16.77	17.28	17.04	-1.39%	0.24
Of which sea travel	0.76	1.63	2.95	80.80%	0.041
TOTAL	699.42	471.57	582.80	23.59%	8.20

Source: VisitSweden's 2010 climate report and Climate programme Svante/Respect.

*Estimate of significant environmental impacts of transport is limited to the employees' business travel.

What has VisitSweden done?

Examples of activities carried out in 2010

VisitSweden started with simpler environmental measures in 2008, and is raising its internal demands for 2009 and 2010. With sustainability being brought onto the company's agenda – on the board, with management and in other company contexts – it has been possible to implement a number of initiatives, both large and small. The greatest environmental impacts are the result of business travel.

Consumables, paper

Several foreign offices and the head office have a principle where they minimise printouts and use both sides of the paper. When purchasing a printer/copier, the Danish office chose an eco-friendly model. A digital invoice management system, introduced in 2009, has replaced some 3,000 paper invoices, with ongoing positive effects.

Printed matter

Most of VisitSweden's printed marketing materials produced at the Stockholm office (Sweden Magazine, 710,000 copies, 2009 Annual Report, 1,000 copies), have used eco-friendly paper from environmentally certified printers.

- Transport

The employees at the head office in Stockholm are encouraged to use green transport modes when possible, e.g. train rather than plane, as well as public transport and green taxi. VisitSweden's Danish office has its meetings in locations accessible by train, and, just like the French office, chooses to travel to meetings on public transport or bicycle.

- Carbon-offsetting of events

VisitSweden's Inspiration Day for the Swedish tourism industry, with some 200 participants, and VisitSweden's internal conference, were carbon offset by way of Respect's carbon-offsetting programme. VisitSweden's Dialogue Day for the heads of the regional tourism organisations, and fam trips for foreign journalists, tour operators and retailers, Academy of Sweden – Culinary and Academy of Sweden – Outdoor, were also offset. In all, five events were carbon offset.

- Electricity consumption

VisitSweden's German office, with an average of 7 employees, switched to green electricity in 2010. The UK office and the Stockholm head office now routinely turn off computers, displays and lights. Here, manual light switches have been replaced by sensors. Gradually they are switching to low-energy light bulbs and energy-efficient computers.

- Purchasing

Wherever possible, the Danish and Stockholm offices, among others, are purchasing eco-friendly, organic or locally produced food (e.g. fruit, milk and coffee).

- Waste management

Sorting of paper, plastic, cardboard, glass and metal continued at VisitSweden. For instance as a result of the energy and environmental analysis of the UK office done in conjunction with the Swedish Embassy, which shares offices with VisitSweden in London.

- Office spaces

As a result of the energy and environmental analysis, VisitSweden's UK office has reviewed sealings around windows.

- Meetings

Telephone and Skype meetings between employees continued to replace some internal face-to-face meetings, which otherwise would have generated travel.

VisitSweden wants to continue to encourage environmental awareness throughout the company. But with a view to increasing and streamlining our internal sustainability work, we are also making progress in areas relating to social and economic sustainability. We also seek a balance in employee workloads, and we encourage competence development and creative thinking. This is utilised for instance when developing innovative marketing activities, but also to find new ways to let sustainability permeate the business.

The response of employees to more climate-friendly behaviour has been very positive, both in work-related contexts and in their private lives. This is a positive side effect that we would like to reinforce.



The tourism industry in Sigtuna aims to make Sigtuna Arlanda Sweden's first climate-neutral destination, with zero net CO₂ emissions. This project will reduce emissions by some 2,000 tonnes of CO₂ annually. Photo: Krister Fransson/Sigtuna Turism

Economic indicators

Sweden increases for the seventh year in a row. Europe recovers.

After a period of financial weakness, which also affected travel in and to Europe, European destinations experienced a recovery averaging 3.2 per cent³⁷. But in Sweden, where 2010 was the seventh consecutive year with an increase in foreign overnights at hotels, cabins and hostels, saw a gain of about 4 per cent³⁸, meaning that Sweden did better than Europe for yet another year.

For 2010, Sweden had a total of 12.8 million overnights from abroad, based on statistics for hotels, cabins, hostels and campgrounds, as well as private cabins and apartments. As in 2009, incoming tourism to Sweden increased more rapidly than the domestic tourism. The value of foreign visitors' consumption in Sweden is vital to Swedish exports, and it increased by 13 per cent between 2008 and 2009 (the latest available figures). The value of foreign consumption in Sweden exceeded the combined value of iron and steel exports and car exports. In total, foreign tourism in Sweden turned over 94 billion Swedish Crowns in 2009.

Employment in many traditional industries is not growing as quickly as in tourism, where nearly 36,000 new full-time jobs were created between 2000 and 2009, an increase of almost 30 per cent. This can be compared to employment in the country as a whole, which during the same period grew by about four per cent.

The tourism export, which is the same as foreign visitors' consumption in Sweden, contributed 13.6 billion SEK in VAT revenue. Tourism is the only industry that generates VAT revenue to the Swedish state, since the consumption takes place inside the country. Below is a presentation of the tourism industry's economic employment-related contribution and economic figures for VisitSweden's operations.



Birdsafari Sweden lets visitors join the bird ringers on the job in Svartådal valley in Västmanland. The experience has Nature's Best approval. Photo: Daniel Green, birdsafarisweden.se

Key financial figures – tourism industry	2010	2009	2008
Number of foreign overnights (hotels, cabins, hostels, campgrounds, private cabins and apartments)	12,802,832	12,329,440	11 963,998
Total turnover in tourism industry (SEK)	n/a*	251.7 bn	244 bn
- of which export value (foreign visitors' consumption in Sweden, SEK)	n/a*	93.6 bn	90.9 bn
Share of BNP ³⁹	n/a*	3.08%	2.86 %
Number of employees in tourism industry (full-time equivalent)	n/a*	159,094	158,936

Key financial figures for VisitSweden			
Total turnover	264,107,000	196,701,000	175,228,000
- of which revenue from state	156,966,000	110,073,000	99,763,000
- of which revenue from industry	107,141,000	84,668,000	75,465,000
Number of employees at VisitSweden, male/female (full-time equivalent)	24/47	20/46	17/43
Number of visitors to www.visitsweden.com	4,400,000	3,957,000	3,900,000

Source: NUTEK/SCB, TSA/National accounts

www.tillvaxtverket.se/huvudmeny/faktaochstatistik/omturism/boendeochinkvarteringsstatistik.4.21099e4211fdb8c87b800017302.html

VisitSweden's Annual Reports 2008, 2009 and 2010.

* Presented in June 2011.

³⁷ UN World Tourism Organization, World Tourism Barometer, January 2011.

³⁸ Swedish Agency for Economic and Regional Growth/SCB, Statistical reports 2010.

³⁹ Tourism's share of Sweden's total GNP. Comparison at current prices.

Employees

VisitSweden aims to be an innovative organisation, a leader in the fields of tourism and communication. VisitSweden's two owners, the Swedish state and the Swedish tourism industry, each with a distinct operational objective, create a dynamic that is directly reflected in the day-to-day work as communicators of Sweden and Swedish destinations and experiences. Our local presence in foreign markets makes us specialists in cultural differences, which we interpret and transform into knowledge. Knowledge we use to create attractive offers to the potential visitor.

Achieving this requires employees who believe strongly in the company and feel a part of its mandate, development and aims. Consideration, creativity and innovative ways of thinking, together with commitment and pride in the organisation and its goals are important factors for success. The expertise of VisitSweden's employees is key to our continued development and lies right at the heart of the company and its operations.

The company includes experienced marketers, analysts, strategists, tacticians, project managers, process managers, as well as specialists in PR, internet, events and relationship marketing, etc. We are the strategic and tactical resource that enables Swedish tourism to reach out to the world.

Against the background described above, VisitSweden's aim is to: *"be an attractive employer that offers professional and personal development. The company will attract, recruit, develop and retain skilled employees, who contribute to the company's target achievement and operational quality".*

In times of great change in the marketplace, with tough competition for both travellers and staff, it's essential that employee policy is progressive. This includes the following critical success factors that have been identified for VisitSweden.

- that the company has skilled and engaged managers and leaders
 - that performance, skills and target achievement are rewarded
 - that employees apply the idea of a "learning organisation"
 - that the company focusses actively on workplace and health issues
- It is crucial for VisitSweden's continuing development as a company to utilise and develop skills and talents when the employees face new challenges. This is the only way we can ensure that our offer to partners is characterised by sound business practices, professionalism and creativity.

Det är nödvändigt för VisitSwedens fortsatta utveckling som bolag att ta tillvara och utveckla kompetens och talanger när de anställda ställs inför nya utmaningar. Det är bara därigenom vi säkerställer att vårt erbjudande till våra samarbetspartners präglas av affärsmannaskap, professionalism och kreativitet.

Shared key values strengthen VisitSweden

Making a good VisitSweden even better!

Extensive work to clarify and strengthen VisitSweden's shared key values was commenced back in 2008, with a joint values workshop,

followed by a number of smaller workshops in different groups throughout the company in 2009 and 2010. The subsequent work was founded on the principle of working from the bottom up, rather than from the top down, and on consideration for every employees' personal values. In autumn 2010 an internal staff survey was conducted, followed up at the company and section level, where joint plans of action were drawn up.

The background to the development of shared key values is that a company's values and attitudes play a big part in how people view the company, both from within and without. Research also shows that strongly value-driven companies are more successful. The aim is to be well positioned to meet our targets related to the company's overarching vision and strategies, and in that context to more quickly welcome new co-workers into our corporate culture.

The brand platform that VisitSweden developed together with the four other promotional organisations, with the position 'progressive' and the core values Innovative, Open, Caring and Authentic, form one of several tools whereby VisitSweden can further develop its corporate culture.

VisitSweden's shared key values are based on core values that support the brand platform for Sweden, adapted to suit a company's operations. The core values that VisitSweden follows are Caring, Businesslike, Professionalism, Innovative and Playfulness. The key values should permeate the employees' behaviour both internally and externally, as well as the external and internal communication about the company VisitSweden.

A learning organisation

For VisitSweden to continue evolving in its mandate – communicating Swedish destinations and the brand Sweden – its employees must upgrade their knowledge constantly. VisitSweden must continually develop in the field of integrated communication. We must refine our marketing tools and channel strategies, update our knowledge of the target groups and be skilled purchasers of specialist competence. It's about how we in the organisation should organise our forces and learn from our experiences. To be better at handling the situations or problems we encounter.

A learning organisation stresses the importance of individuals, groups and entire organisations constantly learning, developing and progressing. Continual learning for everyone and a high level of responsibility and initiative are characteristics of a learning organisation. Plus, that it is easy to acquire, develop and pass on knowledge, and the ability to change and to apply knowledge and insight. In the annual performance and career development reviews, all employees (100%) have evaluated their performance in relation to targets and assignments, and have also created an individual plan for their future development. This plan can contain concrete, external training in the form of short courses or longer programmes. The immediate superior is responsible for reserving funds in the budget for training. This applies to external courses, workshops and seminars. All documentation from the performance reviews is archived with the HR

department, to ensure that agreements regarding development and training are followed up on an annual basis.

Employees who for various reasons leave their employment at VisitSweden should receive support from an external career coach. Employees who retire have often supported the organisation as independent consultants, using their knowledge and experience in a range of projects. Due to the company's small size, there is currently no specific programme for this.

At VisitSweden there is an acceptance of constant change. The organisation's staff discover problems at an early stage, identify errors quickly and rectify them. They constantly search for new or better working methods, procedures and strategies within the organisation. VisitSweden will have an atmosphere where it is permitted to test ideas, even if they don't always lead to improvements.

VisitSweden will be a progressive player in the Swedish tourism industry, and take on the role of network builder and cluster maker with the aim of creating successful deals together with destinations and other partners in tourism and other sectors of Swedish business. An additional challenge is that VisitSweden is a relatively small organisation with only 71 employees, but the structure of a multinational with representation in twelve countries. Several of our partners in the Swedish tourism industry work simultaneously with different sections of the company. We will also build a learning, creative working environment to ensure the ongoing development of employee knowledge and the continued development of our operational working methods. For these reasons it is a challenge to coordinate the company's operations effectively, without constructing excessively large structures around hierarchies, administration or IT systems.

This is done continually in the functions: PR, Internet, Campaign, Travel Trade and Sales & Relations, on Inspiration Days for the tourism industry and at internal conferences for all employees.

Matrix organisation spreads knowledge

VisitSweden has chosen to organise the company in a matrix structure, with all the markets in one dimension and the functions in the other.

The matrix structure facilitates the coordination and quality control of the company, and ensures that the brand platform for Sweden permeates everything we do. However it does place demands regarding clarity in communication, joint problem-solving and shared responsibility for results. At VisitSweden the various work processes in the matrix support the employees to develop further, since new knowledge is added and disseminated, because during problem-solving one must consider more factors than one normally does in each specialist function.

In 2009, in conjunction with our work on key values, we drafted a plan for leadership development, and this work continued through 2010. VisitSweden also continued to focus on employee engagement in sustainability issues⁴⁰ internally and externally, e.g. with the training at the company's internal conference and at the Climate Hunt competition.

Key figures - employees

VisitSweden has 71 FTE employees (in fact 82 individuals), of which 42 work at our marketing offices abroad and 29 work at the head office in Stockholm. 66 per cent of all FTE employees are women. In 2010 the management group consisted of ten people: four women and six men. In management the marketing offices are represented by five regional directors, who represent all the European offices and the US office. The board of directors consists of eight members and two deputy members. The owners – the state and the tourism industry equally – are each represented by four members. In the 2010 board, 50 per cent of the members consisted of women, including the chairperson. Below is a table of the age distribution in the company.

The most common form of employment at VisitSweden is permanent employment (80 per cent), while 20 per cent are in temporary employment. 86 per cent of VisitSweden's employees work full-time. For the employees in Sweden, the rate of absenteeism due to illness was 0.9 per cent (compared to 2.3 per cent in 2009). Of this, 0 per cent was long-term. VisitSweden encourages all staff to make use of a keep-fit allowance.

In 2010 a total of 24 new colleagues were employed, 16 of which were abroad. All new staff from 2010 are still employed at VisitSweden. Staff turnover for 2010 was about 20 per cent, calculated on the number of people who finished compared to the number of staff at the end of the period. Of those who left, 94 per cent were women.

At VisitSweden's offices abroad the majority of employees come from that particular country. VisitSweden benefits from their knowledge of the local market as well as Swedish culture and ways of life. This means that our employees have a diverse background with many different connections to Sweden. In all recruitment, positions are advertised internally and externally via our website, as well as in local media and often in Sweden too. To ensure high accuracy in recruitment, the relevant market office manager, the function manager and HR in Sweden take part in the recruitment process and interview the final candidates.

Age distribution	Company	Management	Board
< 30	7%	0%	0%
30-50	83%	70%	50%
> 50	10%	30%	50%
	100%	100%	100%

⁴⁰ A study shows that the most efficient way to reduce environmental impact is to establish environmental awareness among employees. The Engaged Organization: National Environmental Education Foundation Business and Environment Program, March 2009.

About VisitSweden's sustainability report

This report describes VisitSweden's sustainability work for the year 2010. It is updated annually, normally at the end of the first quarter, and refers to the previous calendar year.

Reporting principles

This report is VisitSweden's third. The disposition and contents are based on the Global Reporting Initiative's Sustainability Reporting Guidelines 3.141, and incorporate the main principles of the UN's Global Compact. This provides a structured way of describing the report's contents as well as ensuring quality. The report also contains VisitSweden's first Global Compact Report.

Sweden was the first country in the world when it requested in 2009 that its more than 50 wholly or partly-owned state companies complete a sustainability report in accordance with Global Reporting Initiative standards. By supplementing existing knowledge with the introduction of regular measurement of certain environmental indicators, we get a picture of the company's effect on its employees, the economy and the environment, and can more easily identify issues to focus on and areas to improve. For instance we now have an idea of the extent of our business travel and how we can meet more efficiently.

Report focus

The main emphasis of the report is on describing how VisitSweden sees its role in the development of sustainable tourism, but it also looks at the threats and opportunities that we believe will affect sustainability work in the future. It shows how VisitSweden incorporates sustainability into the ongoing dialogue with identified stakeholders, with the aim of positioning Sweden as a sustainable destination. The company's own environmental impacts are presented as well, but its greatest opportunity to drive sustainability is through external involvement. We have measured our impacts from 2008 using Respect's programme for climate-neutral companies.



Who are we writing the report for?

We hope that the Sustainability Report will be read by everyone who wants to learn more about how VisitSweden conducts its sustainability work. It is also important for VisitSweden employees, as it explains in a structured way how the internal measures help us to realise our sustainability strategy. Additionally, the report shows how we plan to enhance and develop sustainability in the future.

Limitations

In VisitSweden's 2010 Sustainability Report we have limited the assessment, so that it applies firstly to our energy consumption in terms of electricity and heating of office space, and secondly to the environmental impact of our business travel. This is because we have identified these as measurable and easiest to carry out. VisitSweden neither owns nor produces any products that substantially affect the environment, or any buildings or cars, so any other direct impact will be limited. Heating of offices has not been separated into renewable and non-renewable energy sources, because this is currently not practicable. A further limitation in the report is that our sustainability work and carbon-offsetting excludes our operations in VisitSweden's offices in China (and Japan up to 2010). This is because up to 2010, VisitSweden only owned one third of the company that deals with these regions. Also, we have limited some of the data presented relating to absenteeism, instead presenting data only from head office.

Key figures – climatic impact

VisitSweden is able to present the following key figures regarding its climatic impact for 2010:

- VisitSweden's total CO₂ emissions (tonnes)
- Purchased electricity and heating (for our offices)
- Environmental impact of transport (staff business travel by train, car and plane)



Measurement methods for environmental impact

VisitSweden observes Respect's programme for climate-neutral companies. This programme is based on the international calculation standard, the GHG (Greenhouse Gas) protocol, which is supported by the World Resources Institute and the World Business Council for Sustainable Development. The calculation standard takes into account the direct as well as the indirect emissions of the operations. The 2009 and 2010 calculations differ from those of 2008 in that more precise calculation methods were used. In practice this means that for the 2009 and 2010 reports, employees have provided exact travel distances and actual electricity and heating consumption. The calculations have been scrutinised by Respect. No particular changes in measurement methods have occurred between 2009 and 2010. This Sustainability Report is intended to meet the reporting requirements at level C.

The area around Åre also offers fun water experiences. Whitewater rafting with JoPe Fors & Fjäll is certified by Nature's Best.
Photo: Staffan Widstrand

41. The Global Reporting Initiative (GRI) was developed as a UN initiative. It is now the official template for sustainability reports. VisitSweden will be the first national tourist board in the world to report its impacts on social, economic and environmental sustainability in accordance with GRI standards. Other tourist boards that follow this standard include Portugal.

Report level

		2002 In Accordance	C	C+	B	B+	A	A+
Mandatory	Self Declared							
	Third Party Checked							
	GRI Checked			Report				
						Report Externally Assured		Report Externally Assured

Contact information

VisitSweden



Sweden has fantastic primary produce with unique flavours, thanks to our cool climate and light summers. Berries and game are available thanks to the Swedish Right of Public Access. Skilled chefs dip into the country's culinary heritage and spice it up with new ideas and preparation methods. Photo: Björn Lindberg

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Statement from Swedish independent review

Utlåtande från oberoende granskning

Det här är ett utlåtande från oberoende granskning gjord av Respect Sustainable Business AB (Respect) för V.S. VisitSweden AB (VisitSweden) avseende Hållbarhetsredovisning 2010 för perioden 1 januari – 31 december 2010. Utlåtandet riktar sig i första hand till hållbarhetsredovisningens läsare och VisitSwedens ledning och styrelse.

Slutsatser

Utifrån granskningens avgränsning och de metoder som använts drar vi följande slutsatser:

1. VisitSweden har implementerat processer och procedurer, som följer principerna "fullständighet, väsentlighet och lyhörddhet" som omfattas av AA 1000 Accountability Principles Standard 2008 (AA1000APS); och
2. Grundat på genomförd granskning, har det inte kommit fram några omständigheter som ger oss anledning att anse att VisitSwedens hållbarhetsredovisning inte uppfyller gällande kriterier.

Kriterier

Principer för AA1000 Assurance Standard 2008 (AA1000AS) och Riktlinjer för hållbarhetsredovisning GRI (G3.1) har använts som kriterier för granskning av VisitSwedens hållbarhetsredovisning. Granskningen genomfördes i enlighet med AA1000 AS (2008). Respect hade i uppdrag att genomföra en översiktlig granskning, (Type 1) som omfattar en utvärdering av hur väl verksamhetens efterlever principerna om fullständighet, väsentlighet och lyhörddhet som de är formulerade i AA1000APS, och dessutom översiktlig granskning av GRI resultatindikatorerna på stickprovsbasis.

Metod för granskning

Respect har genomfört granskningen enligt följande metodik i juni 2011:

- Genomgång av VisitSwedens arbetsprocess för att identifiera och bestämma väsentliga frågor som ska inkluderas i hållbarhetsredovisningen.
- Utvärdering av VisitSwedens process för identifiering av och engagemang med intressenter.
- Intervju med den person som är ansvarig för VisitSwedens hållbarhetsredovisning, för att förstå processen för framtagningen av redovisningen.
- Analys och genomgång av processer för att bearbeta data till utvalda resultatindikatorer, på stickprovsbasis.
- Verifiering av redovisad data.
- Genomgång av hållbarhetsredovisningens uttalanden om årets resultat och prestanda.
- Genomgång av VisitSwedens efterlevnad av GRIs riktlinjer på C-nivå.

Efterlevnad av principerna i AA1000APS (2008)

Baserat på granskningens omfattning och metoder kan vi dra slutsatsen att VisitSweden har implementerat processer som följer principerna i AA1000APS (2008).

Väsentlighet

VisitSweden har under året visat exempel på aktiviteter för att säkerställa att hållbarhetsredovisningen omfattar de viktigaste frågorna för intressenterna.

Fullständighet

VisitSweden har etablerat interna processer och metodik för att genomföra intressentdialoger och har under året fört strukturerade dialoger med sina intressenter.

Lyhörddhet

Att hållbarhetsredovisningens fokus och det arbete som avspeglas däri överensstämmer med intressenternas förväntningar, visar på att VisitSweden har svarat gentemot sina intressenter.

Observationer och rekommendationer

VisitSweden har visat fortsatt god utveckling gällande både hållbarhetsarbete och hållbarhetsredovisning.

Roll, ansvar och kompetens

VisitSweden är ansvarig för sammanställning av hållbarhetsredovisningen samt för den information och de uttalanden som finns däri. I samband med granskningen är Respect endast ansvariga gentemot VisitSwedens ledning. Respect har inte varit delaktiga i utarbetandet av informationen som presenteras i rapporten, utan har endast granskat klimatberäkningarna och hållbarhetsredovisningen. Vi säkerställer därigenom en oberoende roll till den aktuella hållbarhetsredovisningen. Vårt granskningsteam har adekvat kunskap och lång erfarenhet inom hållbarhetsarbete och redovisning samt god kännedom om relevanta standarder som GRI, AA1000APS och AA1000AS. För ytterligare information, vänligen besök vår hemsida www.respect.se

Respect Sustainable Business AB
Stockholm, 31 maj 2011

Helen Maalinn



GRI content index

Below is an index of all the parameters included in the Global Reporting Initiative (GRI) guidelines for sustainability reports. In the index we have specified which parameters are met by VisitSweden's sustainability report, and to what degree (fully or partially).

- fully reported
- partially reported

AR = reference to VisitSweden's 2009 Annual Report

SR = reference to page in this Sustainability Report

Profile

1	Strategy and analysis	Page reference	Reported
1.1	Statement from the most senior decision-maker of the organisation (e.g. CEO, chair, or equivalent senior position) about the relevance of sustainability to the organisation and its strategy	SR, p. 4	●
1.2	Description of key impacts, risks, and opportunities	SR, p. 4-9, 14, 17-19	●
2	Organisation profile		
2.1	Name of the organisation	SR, p. 31	●
2.2	Primary brands, products, and/or services	AR, p. 8-13	●
2.3	Operational structure of the organisation, including main divisions, operating companies, subsidiaries, and joint ventures	SR, p. 10, 39-40	●
2.4	Location of organisation's headquarters	SR, p. 31	●
2.5	Number of countries where the organisation operates, and names of countries with either major operations or that are specifically relevant to the sustainability issues covered in the report	SR, p. 41	●
2.6	Nature of ownership and legal form	AR, p. 14 SR, p. 10	●
2.7	Markets served (including geographic breakdown, sectors served, and types of customers/beneficiaries)	AR, p. 7 SR, p. 39	●
2.8	Scale of the reporting organisation, including: number of employees, net sales or net revenues (for public sector organisations); total capitalisation broken down in terms of debt and equity (for private sector organisations); and quantity of products or services provided.	AR, p. 21-23 SR, p. 26, 28	○
2.9	Significant changes during the reporting period regarding size, structure, or ownership	AR, p. 14-16	●
2.10	Awards received in the reporting period	SR, p. 19	●
3	Report Parameters		
	Report profile		
3.1	Reporting period (e.g., fiscal/calendar year) for information provided	SR, p. 29	●
3.2	Date of most recent previous report (if any)	SR, p. 29	●
3.3	Reporting cycle (annual, biennial, etc.)	SR, p. 29	●
3.4	Contact point for questions regarding the report or its contents	SR, p. 31	●
	Report Scope and Boundary		
3.5	Process for defining report content	SR, p. 29	●
3.6	Boundary of the report	SR, p. 29	●

3.7	State any specific limitations on the scope or boundary of the report	SR, p. 29	●
3.8	Basis for reporting on joint ventures, subsidiaries, leased facilities, outsourced operations, and other entities that can significantly affect comparability from period to period and/or between organisations	SR, p. 29	●
3.9	Data measurement techniques and the bases of calculations, including assumptions and techniques underlying estimations applied to the compilation of the Indicators and other information in the report	SR, p. 29	●
3.10	Explanation of the effect of any re-statements of information provided in earlier reports, and the reasons for such re-statement	SR, p. 29	●
3.11	Significant changes from previous reporting periods in the scope, boundary, or measurement methods applied in the report	SR, p. 29	○
	GRI Content Index		
3.12	Table identifying the location of the Standard Disclosures in the report	SR, p. 33-36	●
	Assurance		
3.13	Policy and current practice with regard to seeking external assurance for the report	SR, p. 32	●
4	Governance, Commitments & Engagement		
	Governance		
4.1	Governance structure of the organisation, including committees under the highest governance body responsible for specific tasks, such as setting strategy or organisational oversight	AR, p. 26	●
4.2	Indicate whether the Chair of the highest governance body is also an executive officer	AR, p. 26	●
4.3	Number of members of the highest governance body that are independent and/or non-executive members	AR, p. 23, 26	●
4.4	Mechanisms for shareholders and employees to provide recommendations or direction to the highest governance body	SR, p. 11, 37	●
	Commitments to External Initiatives		
4.12	Externally developed economic, environmental, and social charters, principles, or other initiatives to which the organisation subscribes or endorses	SR, p. 6, 14	●
4.13	Memberships in associations (such as industry associations) and/or national/international advocacy organisations	SR, p. 6, 14	●
	Stakeholder Engagement		
4.14	List of stakeholder groups engaged by the organisation	SR, p. 11-13	●
4.15	Basis for identification and selection of stakeholders with whom to engage	SR, p. 11	●
4.16	Approaches to stakeholder engagement, including frequency of engagement by type and by stakeholder group	SR, p. 11-13	●
4.17	Key topics and concerns that have been raised through stakeholder engagement, and how the organisation has responded to those key topics and concerns, including through its reporting	SR, p. 14, 20-21, 37-38	○

Economic indicators

Economic performance		Page reference	Reported
EC1	Direct economic value generated and distributed, including revenues, operating costs, employee compensation, donations and other community investments, retained earnings, and payments to capital providers and governments.	AR, p. 17 SR, p. 22, 26	●
EC4	Significant financial assistance.	AR, p. 21	●
Market presence			
EC7	Procedures for local hiring and proportion of senior management hired from the local community at significant locations of operation.	SR, p. 28	●

Miljöindikatorer

Energi

EN4	Indirect energy consumption by primary source.	SR, p. 23	●
EN6	Initiatives to provide energy-efficient or renewable energy-based products and services, and reductions in energy requirements as a result of these initiatives.	SR, p. 23-25	○
EN7	Initiatives to reduce indirect energy consumption and reductions achieved.	SR, p. 23-25	○

Emissions, Effluents, and Waste

EN16	Total direct and indirect greenhouse gas emissions by weight.	SR, p. 23-24	●
EN17	Other relevant indirect greenhouse gas emissions by weight.	SR, p. 23-24	●
EN18	Initiatives to reduce greenhouse gas emissions and reductions achieved.	SR, p. 23-25	●

Products and services

EN26	Initiatives to mitigate environmental impacts of products and services, and extent of impact mitigation.	SR, p. 23-25	○
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Transport

EN29	Significant environmental impacts of transporting products and other goods and materials used for the organisation's operations, and transporting members of the workforce.	SR, p. 24	●
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Overall

EN30	Total environmental protection expenditures and investments by type.	SR, p. 23	●
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Labour Practices & Decent Work

Employment

LA1	Total workforce by employment type, employment contract, and region.	AR, p. 21-22 SR, p. 28	●
LA2	Total number and rate of employee turnover by age group, gender, and region.	SR, p. 28 AR, p. 22	●

Occupational Health and Safety

LA7	Rates of injury, occupational diseases, lost days, and absenteeism, and total number of work-related fatalities by region.	AR, p. 22 SR, p. 28	●
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Training and Education

LA11	Programs for skills management and lifelong learning that support the continued employability of employees and assist them in managing career endings.	SR, p. 27-28	●
LA12	Percentage of employees receiving regular performance and career development reviews.	SR, p. 27	○

Diversity and Equal Opportunity

LA13	Composition of governance bodies and breakdown of employees per category according to gender, age group, minority group membership, and other indicators of diversity.	SR, p. 28	●
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Society Performance Indicators**Aspect: Community**

SO1	Nature, scope, and effectiveness of any programs and practices that assess and manage the impacts of operations on communities, including entering, operating, and exiting.	SR, p. 9, 11, 14-22	○
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Product Responsibility**Product and Service Labelling**

PR3	Type of product and service information required by procedures, and percentage of significant products and services subject to such information requirements.	SR, p. 16, 21	○
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Tour Operators' Sector Supplement**Internal management****Labour practices**

IM1	Evidence of recruiting local residents (including destination nationals) for destination posts including management positions	SR, p. 28	●
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Health and safety

IM2	Policies and programmes to address the physical and mental well-being of staff at headquarters and destinations	SR, p. 27-28	○
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Training and education

IM4	Policies and actions in place to accommodate cultural customs, traditions and practices of staff throughout the organisation	HR, s 27-28	○
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Materials

IM7	Percentage of promotional materials and customer documentation that are produced in accordance with an environmental standard	SR, 18-19, 24-25	○
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Customer relations

CR4	Means to invite customers' feedback on sustainability issues related to the holiday product and actions taken to respond to feedback.	SR, p. 12, 15	●
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Cooperation with destinations**Partnerships**

D1	Engagement with destination stakeholders to address issues, including those identified in PMD3	SR, p. 20-21	○
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Community development

D2	Identification and offer of commercial opportunities and assistance to non-contracted suppliers that support community development	AR, p. 8-9	○
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UN Global Compact, Communication on Progress. Report 2010

The company

VisitSweden is a marketing and communications company, whose aim is to promote Sweden as a travel and tourism destination and to market the Sweden brand. VisitSweden operates in 12 countries and employs about 70 people. VisitSweden is owned jointly by the Swedish state and the Swedish tourism industry.

All marketing of Sweden is focussed on selected target groups of leisure and business travellers. VisitSweden conducts about 250 campaigns and projects a year, including digital campaigns, presence in social media, events and workshops, personal meetings, PR, print advertising and development of our websites at www.visitsweden.com and www.communityofsweden.com.

VisitSweden joined the UN Global Compact in 2009 and is one of some 110 Swedish companies that support the Compact.

Our commitment

VisitSweden is strongly committed to following its ten Principles on human rights, labour rights, environment and anti-corruption. This is reflected in the company's core values – caring, professional, business-like, playful and innovative. VisitSweden values the human perspective as highly as the business perspective, and this pervades the entire organisation. The Sweden brand is based on and developed according to similar core values.

VisitSweden's aim is to market sustainable travel experiences to our international visitors. The results of this aim are evaluated in VisitSweden's sustainability reports. Much of the marketing communication on Sweden is, when relevant, based on Swedish core values such as gender equality, respect for nature and children's rights, with the aim of inspiring international visitors to travel to Sweden.

VisitSweden continually integrates the UN Global Compact principles in the company's policies and strategies, and spreads knowledge of the compact. VisitSweden has decided to focus the 2011 Global Compact Report, which is the company's first, on the subjects of labour and environment.

Statements and activities

Labour Standards

The essence of VisitSweden's core values explicitly supports the principles of freedom of association, collective bargaining and the abolition of forced and child labour among employees and consultants.

Principle 3.

Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining

VisitSweden supports and follows all applicable laws and guidelines concerning freedom of association and the right to collective bargaining. This includes the Swedish Employment Protection Act, Employment (Co-Determination in the Workplace) Act, Working Hours Act and Annual Leave Act.

No violations against these laws and regulations have been reported in 2010.

VisitSweden supports the UN's Universal Declaration of Human Rights. No employee of VisitSweden should in any way cause or contribute to the violation or circumvention of human rights. Great emphasis is placed on securing the human rights of the employees as described in the ILO Core Conventions.

Principle 4.

Businesses should uphold the elimination of all forms of forced and compulsory labour

VisitSweden supports and follows all applicable laws and regulations concerning forced and compulsory labour, based on Swedish law and ILO conventions. VisitSweden follows regulations on forced labour as stated in the ILO conventions nos. 29 and 105.

Additional laws in Sweden are the Employment Protection Act, which protects employees in the event of layoffs or dismissals, the Employment Act, regarding co-determination in the workplace and the Act on labour market programmes (2000:625), which contains comprehensive provisions on the employment programmes. Other applicable legislation includes law 2007:395 and regulation 2000:634 on labour market programmes, regulation 1997:1275 on employment support, ordinance 2000:630 concerning specific measures for people with disabilities reducing capacity work, ordinance 2007:414 on job and development guarantee, ordinance 1996:1100 on activity support for taking part in labour market programmes and regulation 2007:418.

No violations against these laws and regulations have been reported in 2010.

Principle 5.

Businesses should uphold the effective abolition of child labour

VisitSweden supports and follows Swedish laws and guidelines that prevent child labour as regulated in the Swedish Work Environment Act, chapter 5 and in the Swedish Work Environment Authority's provisions about under-aged workers. The provisions regulate work assignments, working hours and work without instructor. VisitSweden also follows the provisions on under-aged workers as stated in EU-directives and the ILO conventions nos. 138 and 182. It is VisitSweden's duty as employer to provide good working conditions for under-aged workers.

No violations against these laws and regulations have been reported in 2010.

Principle 6.

Businesses should uphold the elimination of discrimination in respect of employment and occupation

At VisitSweden no form of offensive special treatment or other forms of harassment is accepted.

VisitSweden supports and follows Swedish laws and regulations against discrimination based on ethnicity, religion or other belief, functional limitation or sexuality. This includes the Swedish Equi-

lity Act, which concerns women's and men's equal rights in terms of work, employment and other employment opportunities at work, the Discrimination Act, which counteracts discrimination and supports equal rights and opportunities regardless of gender, gender identity or expression, ethnicity, religion or other belief, disability, sexual orientation or age.

All employees are responsible for following VisitSweden's discrimination policy and by doing so help to eliminate discrimination within the company.

No violations against these laws and regulations have been reported in 2010.

Environment

The essence of VisitSweden's core values explicitly supports the principles of environmental challenges, responsibility and environmentally friendly technologies.

Principle 7.

Businesses should support a precautionary approach to environmental challenges.

VisitSweden's strategy for sustainable tourism is a guiding principle for the company – at company, national and international levels. The overarching strategy covers three areas:

- encourage and facilitate sustainable travel, and show people how to visit Sweden responsibly
- feature good examples of sustainable practice, in order to stimulate the tourism industry to develop more sustainable products and experiences
- promote and engage in sustainability issues at company, national and international levels.

A review of VisitSweden's communication messages to foreign visitors has started. Its purpose is to improve the information aimed at helping visitors find sustainable alternatives. For example in VisitSweden's PR work and on the company's websites.

VisitSweden held a full-day seminar aimed at inspiring and educating the Swedish tourism industry about how to communicate sustainability. A communication strategy for sustainable experiences in Sweden was launched simultaneously.

Since 2008 VisitSweden has identified electricity and heating of the head and foreign offices, plus the staff's own business travel, as the main environmental impacts, measured in tonnes of carbon dioxide emissions. By measuring its emissions, VisitSweden can control and reduce them, on a per capita basis. From 2008 to 2010 greenhouse gas emissions have decreased by 117 tonnes, or 17 per cent.

Principle 8.

Businesses should undertake initiatives to promote greater environmental responsibility.

Within the European Travel Commission agenda, VisitSweden has taken an active role to develop and increase knowledge about sustainability issues among the national tourist boards in Europe. For example by discussing mutual strategies for sustainability and development.

VisitSweden also works to inspire the tourism industry in Sweden to act more responsible, for example by highlighting good examples of communication aimed at potential visitors and within the Swedish tourism industry itself.

Principle 9.

Businesses should encourage the development and diffusion of environmentally friendly technologies.

When possible, VisitSweden prioritises sustainable travel modes for staff, e.g. using train instead of air transport. The "Green Flights" concept – a world first – was introduced in Sweden and VisitSweden is increasing awareness of this among international media by way of its strategic PR work.

VisitSweden is a climate-neutral company and it compensates its remaining environmental impacts by funding a CDM-certified project in India. These projects focus on, for example, replacing electricity sourced from fossil fuels.

For background on the Global Compact, see Appendix 5.

Appendix 1

VisitSweden's mandate and organisation

VisitSweden's mandate involves international marketing with a dual focus. The first is image marketing of the brand Sweden. The second is product marketing of experiences and destinations. The mandate is fulfilled by way of VisitSweden's more than 250 marketing activities per year in the 12 prioritised markets worldwide.

VisitSweden is owned in equal parts by the Swedish state through the Ministry of Enterprise, Energy and Communications, and Svensk Turism AB, which in turn is owned by the Swedish tourism industry. The basic operations and the image marketing i.e. the promotion of the brand Sweden, are financed by state funding. The Swedish tourism industry finances the marketing costs for its own products. VisitSweden's mandate is formulated in guidelines from the state and based on expectations from the Swedish tourism industry. The guidelines specify a number of overarching targets for the operations.

How VisitSweden will meet its owners' expectations

VisitSweden takes its point of departure from six strategic areas. These are based on the guidelines from the state, and from the expectations and demands of the Swedish tourism industry. The strategy is clear, and it benefits Swedish tourism and the brand Sweden.

Vision for VisitSweden

VisitSweden's challenge is to find innovative, unexpected communication solutions that create a surprise effect, reach the target group and influence them to travel to Sweden. VisitSweden is a progressive network builder and cluster maker in Swedish tourism, creating successful business together with destinations and other public and private partners, which results in increased revenue for the Swedish tourism industry.

Everything starts with the target group

The greatest potential for increased travel to Sweden, in VisitSweden's view, is the experienced traveller seeking new, different experiences. And our target groups reflect this. The international marketing of Sweden is based on three questions, and the questions are found in the target groups. Through ongoing analyses we refine our knowledge of these travellers, including the most effective means of reaching them.

1. Which experiences attract our visitors?
2. To which messages do they listen?
3. Through which marketing channels can we best reach them?

Seven guiding strategies

VisitSweden has identified and further developed seven strategic areas as a foundation in order to work with full focus on strengthening Sweden's position as a destination. The strategies form the basis of our daily work and are a requirement for our development into a modern communications company.

1. Consistent focus on target group
All market communication starts with the desires and motivations of the target groups abroad.
2. Overarching message about Sweden
All communication starts from a joint brand platform for Sweden, developed by the organisations in the Council for the Promotion of Sweden.
3. Long-term partnerships
VisitSweden gathers the tourism industry in long-term partnerships between public and private players from local, regional, national and international stages.
4. Efficient communication channels
VisitSweden has in-depth knowledge of the target groups and markets, and is familiar with their communication habits. Selection and design of communication channels is based on this knowledge.
5. Market positioning themes ensure clear messages
VisitSweden's aim is that all marketing activities are based on the selected positioning themes, which mobilise and position Sweden internationally: Urban Nature, Natural Playground, Swedish Lifestyle and Vitalised Meetings.
6. Sustainable development
VisitSweden promotes sustainable tourism that attracts the visitor and encourages the tourism industry to choose sustainable solutions.
7. Nation Branding
VisitSweden develops strategic, progressive image marketing for the country Sweden, that also highlights destination Sweden.

Collaboration the key to success.

Through partnerships, other business collaborations, joint working groups (e.g. in analysis, discussion days, marketing- and inspiration days and daily joint activities) we maintain continual contact with the tourism industry and get valuable feedback on our work together. Thanks to this dialogue we always have the latest information on what the industry expects from us.

Appendix 1

The Swedish state's guidelines specify the overarching aim of the business:

"VisitSweden shall contribute to Sweden being a highly attractive tourist destination and that tourism is to be competitive in the long term, contributing to sustainable growth and increased employment throughout the country."

In concrete terms, for the Swedish tourism industry this means that:

"VisitSweden shall contribute to Sweden being a highly attractive tourist destination..."

VisitSweden matches the Swedish offering of tourism products to the target group's requirements.

"...tourism is to be competitive in the long term..."

Collaboration is key to success and growth in tourism. VisitSweden's partnerships are based on at least three years of cooperation with, for instance, tourism companies, destinations and transport companies.

"...sustainable growth ..."

VisitSweden shall strive to put Sweden in a leading position worldwide as a sustainable destination across the entire value chain.

"...increased employment..."

More overnights, with increased consumption of goods and services means increased employment in the tourism industry. This encourages long-term thinking and healthier businesses.

"...throughout the country."

The target group's motivation varies: some people want big city action while others want nature. Swedish destinations have developed in an interplay between natural assets and entrepreneurial spirit.

Appendix 2

Organisational profile

VisitSweden is a communications company for the Swedish tourism industry and other companies and organisations that want to promote themselves internationally with a clearly Swedish profile. VisitSweden also increases awareness of Sweden and strengthens the overall image of Sweden.

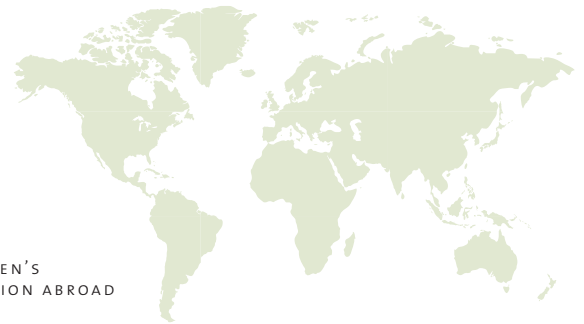
For VisitSweden, it is vital to have a local presence in the 12 prioritised markets (13 markets during 2010). The local offices provide VisitSweden with knowledge of the local lifestyle, culture, trends, travel needs, accessibility, the current debate and in particular how Sweden is perceived.

The employees' competence and creativity is the key to the organisation's ability to find the most efficient communications solutions. To ensure this competence is spread throughout the organisation, VisitSweden has a matrix structure (see appendix 3). Specialist knowledge in areas like internet communication, PR, company meetings, incentive travel and campaign planning traverse VisitSweden's marketing boundaries and create synergies and consensus throughout the company.

VisitSweden's organisation consists of a head office in Stockholm and six marketing regions. Each region includes markets with similar conditions or languages, enabling synergies in the international marketing activities.

The organisation has a great need to exchange experiences, between its own offices and between VisitSweden and its partners at home. This results in frequent travel, usually by air, between Sweden and the market in question, as face-to-face meetings are often necessary to develop joint marketing concepts. For a detailed description of the environmental impact of our work-related travel, see the table on page 24.

The sustainability work is developed within each function as well as at each office.



VISITSWEDEN'S ORGANISATION ABROAD

Region Europe North
Norway, office in Oslo
Denmark, office in Copenhagen

Region Europe East
Finland, office in Helsinki
Russia, office in Moscow

Region Europe Central
Germany, office in Hamburg
Netherlands, office in Weesp

Region Europe West/USA
United Kingdom, office in London
USA, office in New York

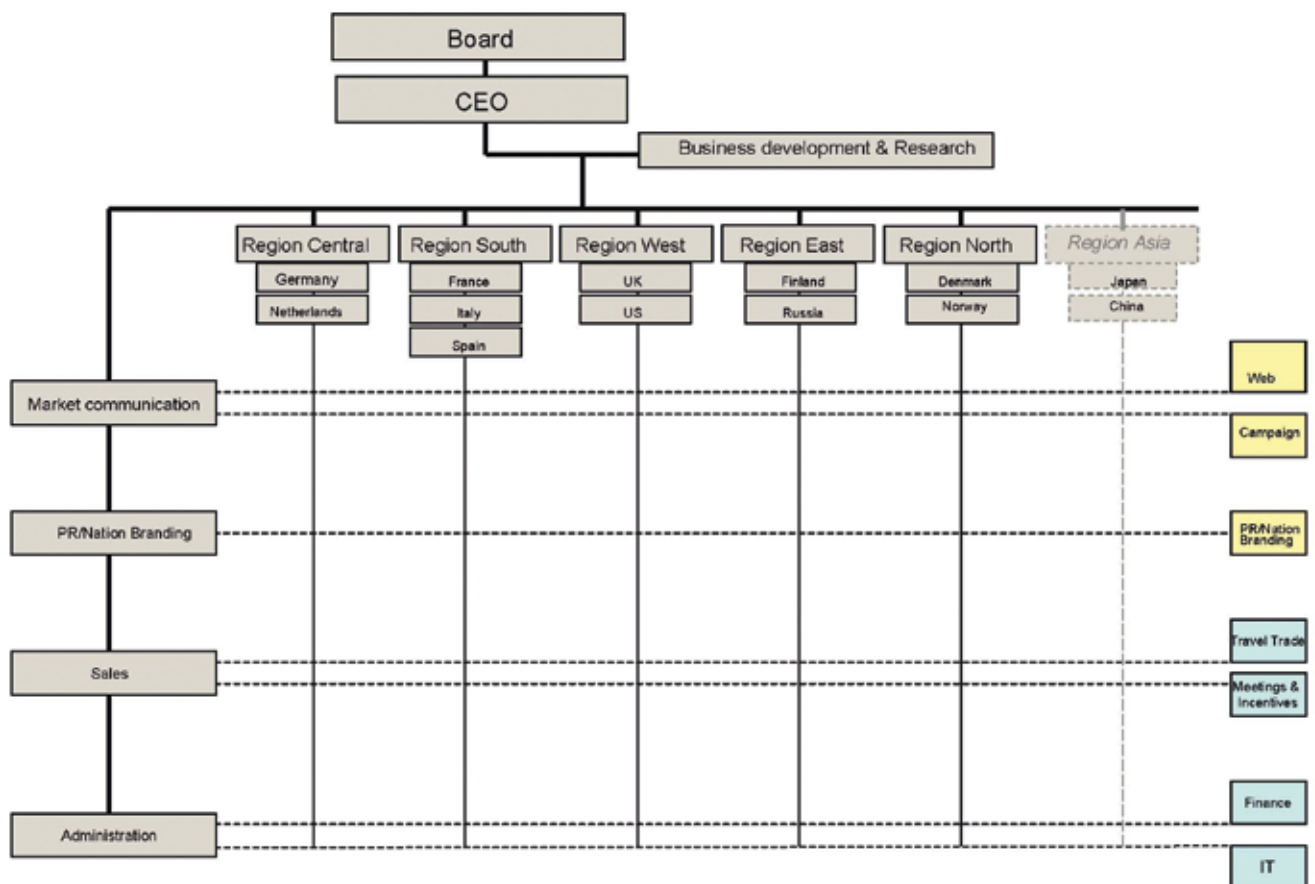
Region Europe South
France, office in Paris
Spain, office in Barcelona
Italy, office in Milan

Region Asia
China, office in Peking

This Sustainability Report, excludes climate and sustainability work for operations in China, because in 2010 the Chinese company was part of a joint marketing company for Asia, only partly owned by VisitSweden.

Appendix 3

VisitSweden's matrix organisation 2010

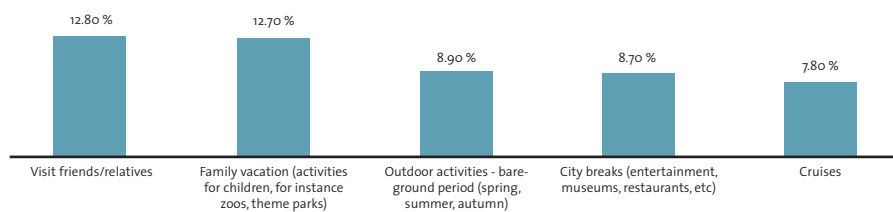


Appendix 4

VisitSweden's target group analyses, main focus: holiday trip

Q12. Which was the main purpose with your holiday trip?

Top 5



Appendix 5

Background: Global Compact

The Global Compact was launched by Kofi Annan to promote social and environmental responsibility among international businesses. It was in a speech to the World Economic Forum that he urged business leaders to join an international initiative – the Global Compact – which would bring together businesses with UN agencies, trade unions and civil society in support of ten principles regarding human rights, labour standards, the environment and against corruption.

The Global Compact's operations commenced in the UN Headquarters in New York City on 26 July 2000. Harnessing the power of collaborative efforts, the Global Compact aims to bring together responsible businesses, making them a part of the solution to the challenges of globalisation. Business – in partnership with other agents in society – will thus help the Secretary-General realize his vision: a more sustainable economy that does not marginalise certain social groups. Today hundreds of businesses from all over the world, as well as international trade unions and voluntary organisations, are involved in the Global Compact. A voluntary association of businesses, the Global Compact has two objectives:

- To mainstream the ten principles in business activities around the world.
- To catalyse actions in support of broader UN goals, including the Millennium Development Goals (MDGs).

To realise these objectives, the Global Compact provides various mechanisms for promoting engagement: policy dialogues, learning, local structures and projects. The Global Compact is not a regulatory agency; it neither monitors, drives nor measures the behaviour or actions of a business. Rather, it puts its trust in the businesses – their responsibility and openness to the public – as well as trade

unions and voluntary organisations to initiate and collaborate in an effort to implement the principles on which the Global Compact is based.

The principles:

Human Rights

Principle 1: Businesses should support and respect the protection of internationally proclaimed human rights; and

Principle 2: make sure that they are not complicit in human rights abuses.

Labour Standards

Principle 3: Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining; Principle 4: the elimination of all forms of forced and compulsory labour;

Principle 5: the effective abolition of child labour; and

Principle 6: the elimination of discrimination in respect of employment and occupation.

Environment

Principle 7: Businesses should support a precautionary approach to environmental challenges;

Principle 8: undertake initiatives to promote greater environmental responsibility; and

Principle 9: encourage the development and diffusion of environmentally-friendly technologies.

Anti-Corruption

Principle 10: Businesses should work against corruption in all its forms, including extortion and bribery.

Source: UNHCR

Appendix 6

Conditions for becoming climate neutral in Respect's climate programme.

For a business to achieve climate neutrality its emissions of carbon dioxide, methane and nitrous oxide must be calculated. Measures to reduce carbon dioxide emissions must be taken. Reporting takes place as per an established template.

In short:

- Calculation of organisation's own, direct climate-impacting emissions.
- Calculation of climate impacts from purchased electricity and district heating.
- For climate impacts from indirect sources, business travel is always counted.
- For other indirect emissions, the organisation is recommended to, if possible, also report emissions from suppliers, goods transport and staff travel to and from work.
- The organisation must report measures taken in transport and energy, otherwise a comment must be provided.
- The organisation must report measures taken with regard to the main source of carbon dioxide emissions, otherwise a comment must be provided.
- Remaining emissions (as in at least items 1 and 2, and business travel) that have not been reduced by way of the organisation's own measures must be offset.

Offsetting through CDM projects

Emissions that remain despite programmes of measures are offset through support to CDM (Clean Development Mechanism) projects, which leads to measurable emission reductions. The projects build up green technology in developing countries while at the same time bringing positive social outcomes. The projects follow the intentions of the Kyoto Protocol and are certified by the UN.

See also www.klimatneutral.se