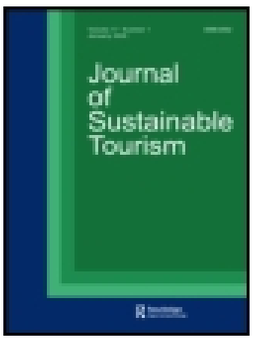

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Optimizing or maximizing growth? A challenge for sustainable tourism

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Virtually all destinations seek to increase tourist numbers, pursuing economic maximization strategies. Considerably less attention is paid to optimizing existing tourist systems to create more profitable, stable, resilient and potentially more sustainable entities. While aspects of tourist expenditure, average length of stay and seasonality as three key destination management variables have received considerable attention in the literature, focus has usually been on the identification of "profitable" tourism markets by considering observed patterns of spending, length of stay and vacation timing. Building on such earlier studies, this paper focuses on flexibilities in these parameters: could tourists have spent more, stayed longer or visited during a different season? Perceptions of destination expensiveness as a potential deterrent to visitation were also addressed. Based on a sample ($n = 1914$) of domestic and international tourists in the Swedish cities of Kalmar and Stockholm, data were collected in face-to-face interviews using questionnaires. Results indicate considerable potential to optimize the Swedish tourism system with regard to all variables studied, while also providing new insights for destination management in the context of economic resilience. Results also indicate the need for researchers everywhere to have detailed market knowledge if they are to persuade the industry to change its sustainability behavior.

Keywords: average length of stay; destination management; expenditure; seasonality; sustainability; vulnerability

Introduction

At the global, national and regional level, tourism is an economic production system with the ultimate goal of maximizing the sector's contribution in terms of GDP, foreign exchange earnings and employment (Dwyer, Forsyth, & Dwyer, 2010). In this production system, various input variables including natural and cultural attractions, tourism infrastructure, activities, distance to markets, security and safety, cost of labour and plant, and/or pricing strategies determine the overall attractiveness and competitiveness of a destination (Bramwell, 2004; Dwyer et al., 2010; Dwyer & Kim, 2003; Hall, 2005; Scott, Hall, & Gössling, 2012). Destination attractiveness affects tourists' timing of visitation,

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levels of demand, willingness to pay and desired length of stay, and hence the overall economic contribution made by the sector (Baum & Lundtorp, 2001; Butler, 2001). In attempts to increase tourism's economic impacts, destinations have pursued various strategies. A common strategy, and an objective of the vast majority of destinations, is to increase visitor numbers, often with a focus on increasing international tourist arrivals. Views on arrival number growth are, for instance, evident in international and supranational policy documents, including virtually all those issued by the UN World Tourism Organisation (e.g. UNWTO, 2014), the World Travel and Tourism Council and the World Economic Forum (e.g. Blanke & Chiesa, 2013).

The dominant approach to tourism planning and development may thus still represent "boosterism" (Hall, 2008), a focus on quantitative tourism-derived economic and visitor growth. Maximization, from this understanding, is largely equal to increasing arrival numbers or growth in tourism expenditure. In recent years, maximization strategies have, however, come under growing scrutiny for economic and environmental reasons. In 2008, the global financial crisis showed that economic systems are not necessarily stable and that variation in tourist demand can be a consequence (Hall, 2010; Sheldon & Dwyer, 2010). Demand is also linked to commodity prices, such as oil, which have gone through huge fluctuations over the past 10 years (Becken, 2015). Climate change, linked to the burning of fossil fuels, is also linked to shifts in seasonality and tourism demand (Scott et al., 2012), requiring drastic emission reductions to remain within manageable margins of ecosystem change (IPCC, 2013), and hence requires drastic increases in the cost of fossil fuels (McGlade & Ekins, 2015; van Cranenburgh, Chorus, & van Wee, 2014). Paradoxically, even where the need to enhance sustainable tourism development is reaffirmed, as for instance by the UNWTO (2012) calling for the maximization of economic, social and cultural benefits, it is usually growth-oriented economic perspectives that ultimately prevail in destination management (Dwyer et al., 2007, Dwyer, Duc Pham, Forsyth, & Spurr, 2014; Hall, 2014; Sharpley & Telfer, 2014). Yet, the impossibility of pursuing maximization strategies while achieving "green growth", i.e. implying dematerialization and decarbonization in ways that preserve ecosystem health, is becoming increasingly evident (Hall, 2009, 2013, 2015). This appears to be also recognized by a growing number of destinations that have started to focus on expenditure, rather than tourist arrival number maximization (Dwyer et al., 2014).

An alternative approach to destination management may be sought in optimization. In scientific and economic research, the optimization of some variables usually involves finding a position of the highest achievable or most cost-effective performance under a given set of constraints, by maximizing a desired set of factors and minimizing undesired ones (Nocedal & Wright, 2006). Put simply, to optimize something is to make it as good as possible. Optimization in tourism has been mostly discussed within the framework of the Tourism Optimization Management Model (TOMM), originally developed by Manidis Roberts Consultants (1997), to improve the management of Kangaroo Island, South Australia. The concept has since been used in various sustainable management contexts, with a view to embrace a wider range of management dimensions (Hall, 2008). In the context of this paper, optimization is economically defined, covering two key aspects: (1) opportunities to increase economic benefits from an existing tourism system; this stands in contrast to maximization which considers growing arrival numbers from specific markets only to the extent that these replace arrivals from other markets; and (2) economic resilience, i.e. the creation of more stable tourism economies less affected by financial instability, exchange rate fluctuations, oil prices, or other elements of disruptive change (Biggs, Hall, & Stoeckl, 2012; Biggs, Hicks, Cinner, & Hall, 2015).

To identify opportunities for optimization, various parameters of destination economics can be analyzed. In the past, research has sought to understand and increase tourist expenditure by identifying profitable markets, sometimes with a view to include dimensions of sustainability (Weaver & Oppermann, 2000), to identify visitors staying for long periods of time (Alén, Nicolu, Losada, & Domínguez, 2014), and to influence seasonality in attempts to avoid imbalances in visitor arrivals and economically unprofitable periods (Baum & Lundtorp, 2001). This paper develops a different approach to understanding these parameters by investigating the flexibilities of a sample of tourists in Sweden, i.e. whether tourists would have been able to spend more; whether they could have stayed longer; and whether they may have visited during a different time of the year. Furthermore, it investigates and discusses the vulnerability of destinations from a price sensitivity perspective, i.e. whether there are significant shares of tourists that already consider the destination as too expensive, and who are thus unlikely to return or, vice versa, likely to spread an image of unaffordability.

Expenditure

Tourism expenditure is a topic that has been the subject of substantial research efforts over the past few decades. For most agents in a destination, including destination marketing organizations (DMOs), transport providers, accommodation businesses, attractions and governments, financial return is the main concern, i.e. expenditure of tourists in comparison to the costs of servicing visitors (Dwyer et al., 2014). Tourism expenditure provides the basis for estimating the economic contribution of tourism to a destination and the economic impact of shocks to tourism demand (Dwyer et al., 2007, 2014). Determinants of tourist expenditure have thus been the focus of a substantial volume of study. Rational consumers face a multi-level separable choice beginning with the decision on the budget amount to spend on tourism, followed by allocating that amount to different travel choices. It is generally held that the greater the cost of a product, such as a vacation, the greater will be a consumer's ego involvement. Thus, when considering destination alternatives, more time is likely to be spent on deliberation and overt search activity than for most other types of purchases. Socio-demographic, psychological and trip-related factors are each important to this decision. Most studies appear to have looked at tourists who had already made a decision to travel; in other words, those who had already made a decision to spend a significant amount of their discretionary income on a vacation rather than spending it on a range of alternative options (Dolnicar et al., 2008). Therefore, changing the point in a trip at which visitors are intercepted may shed significant new light on discretionary decision-making. This is important for understanding tourist behaviours generally, but especially for understanding behavioural change, a key requirement in the implementation of more sustainable forms of tourism (Bramwell & Lane, 2013; Cohen, Higham, Peeters, & Gössling, 2014; Hall, 2014).

The size of the disposable funds available is an implicit key factor in many travel decisions. This again refers to an assumption that holiday budgets are constrained, and that there is only a certain amount of money that can be allocated to tourism (Eugenio-Martin, 2003), with macro-modelling indicating that income and price are the two most important economic determinants of tourism expenditure. Yet, studies also show that the financial determinants of household participation in tourism cannot just be reduced to the influence of current income. Rather, households make a complex financial appraisal of their budget situations, in which the latter is conditioned not only by a household's income level but also by financial variables relating to households' future income expectations (among others, employment status, job stability and other ways of assessing the

risk of losing a job) and variables that proxy the likelihood of being credit-constrained, such as savings capacity, capacity to borrow from financial institutions, and housing tenure. Each of these variables has been found to affect individuals' perception of the influence of budget constraints on participation in tourism, as well as the overall amount of money spent on a holiday (Alegre, Mateo, & Pou, 2010). However, holiday budget decisions are also influenced by intrapersonal factors. For example, Wang, Rompf, Severt, and Peerapatdit (2006) examined the effect of traveller psychological characteristics on their total and disaggregated expenditure. Five psychographic variables presenting what travellers value most were incorporated in their study. Variables included were stability/excitement, self/family, being passive/being active, learning/dropping out and follow tradition/try new things. People seeking excitement had a higher expenditure than those seeking stability and self-oriented people spent more on accommodation than those who were family-oriented. Other studies found that people who travelled for ego/status enhancement tend to spend more than people travelling with other motives (Mehmetoglu, 2007) and the stronger the motive, the greater the expenditure would be (Thrane, 2002).

In line with the effects of psychological characteristics, non-financial aspects of households, such as marital status, composition, level of education of its adult members, and stage in the family lifecycle also influence tourist participation, vacation length and budget constraints (Alegre & Pou, 2004; Cai, 1999; Fleischer & Seiler, 2002; Mergoupis & Steuer, 2003; Nicolau & Mas, 2005a, 2005b; Ram & Hall, 2015; Van Soest & Kooreman, 1987). However, while there is considerable knowledge on expenditure patterns and their psychological and social underpinnings, considerably less is known about budget flexibilities and specific conditions under which tourists are willing to exceed planned spending (e.g. "impulse purchasing", Laesser & Dolnicar, 2012).

Length of stay

Average length of stay (ALS) has received considerable attention in the literature because it is positively related to tourism income. Even though interrelationships of length of stay and expenditure are complex and dependent on various socio-demographic variables such as nationality, age, occupation, accommodation preferences, or season (Alén et al., 2014; Martínez-Garcia & Raya, 2008), there is a general consensus that length of stay is correlated with tourism expenditure, though average spending per day appears to fall over longer periods of stay (Thrane & Farstad, 2011). Where tourists stay for longer periods of time in the same hotel room, there are also positive economic implications with regard to reduced operational costs (Barros & Machado, 2010). Yet, in recent years, concerns have been raised that ALS is declining (Martínez-Garcia & Raya, 2008), with detrimental consequences for destination management. Not only does this imply that hotel variable costs increase, but it also has sustainability implications. More but shorter trips increase overall transport-related emissions. It also means that, for destinations to maintain the same number of guest nights, and consequent level of income, tourist arrival numbers need to grow.

Martínez-Garcia and Raya (2008, p. 1064) propose "the tourist product must adapt itself to the amount of time the tourist has available at destination". This research seeks to better understand whether this amount of time is indeed a given (fixed), or whether there is an amount of time *made* available, and hence a variable that can be influenced by improving destination attractiveness (Dwyer & Kim, 2003) or focusing marketing efforts on specific target groups. For example, it seems well established that elderly tourists have a tendency to stay longer (Alén et al., 2014), and that it is easier to extend ALS in summer, i.e. when the climate is more preferable (Alegre & Pou, 2006; Barros, Butler, &

Correia, 2010). Yet, to strategically enhance ALS, it is important to first understand the motivation of tourists for choosing a specific timeframe for their visit, and whether this timeframe can be adjusted. It is generally accepted that vacation time is restricted by the number of vacation days and discretionary income to be spent on leisure travel (Hall, 2005), but relatively little research has addressed the reasons for a given length of stay from a tourist viewpoint (Gokovali, Bahar, & Kozak, 2007).

Seasonality

Seasonality is related to length of stay and numbers of arrivals. Butler (2001, p. 5) defined seasonality as the "temporal imbalance in the phenomenon of tourism", an aspect that has mostly been studied with a view to forecasting demand (Koenig-Lewis & Bischoff, 2005). Seasonality has been explained in terms of natural/physical causes (e.g. climate), institutional customs (e.g. school holidays), calendar effects, as well as sociological and economic aspects, and with a view to supply side constraints (BarOn, 1975; Baum & Hagen, 1999; Hartmann, 1986). Notably, seasonality is generally understood to include an element of regularity, i.e. the assumption that tourist flows reoccur during a similar time of the year and with a similar magnitude (Hartmann, 1986). Where this is not the case, destinations are vulnerable to the economic impacts of revenue variation. Yet, seasonality also has positive impacts for destinations, such as opportunities for local communities to recover from intense peak seasons (Flognfeldt, 2001). There is consensus, however, that seasonal variation needs to be managed, for which six basic strategies exist, i.e. to increase, reduce or redistribute demand as well as supply (Weaver & Oppermann, 2000). As outlined by Koenig-Lewis and Bischoff (2005), strategies to achieve this may include alternative packaging, presentation, promotion, distribution and pricing.

There exist various case studies of tourist motivations to visit during specific times of the year. While these studies investigate the effects of pricing strategies (Manning & Powers, 1984), differences between autumn and summer tourists (Spotts & Mahoney, 1993), or the effects of developing attractions or activities (Lundtorp, Rassing, & Wanhill, 1999), few studies have assessed the tourists' views on seasonality and their perceptions of barriers to visitation during different times of the year.

Tourism in Sweden

The focus of this research is on domestic and international leisure travellers in Sweden, a country with 9.1 million inhabitants (CIA Factbook, 2014) and 18.8 million international tourist arrivals in 2013 (IBIS, 2014). Sweden's tourism industry in 2012 presented a vision, "with a focus on sustainability (to) double Swedish tourism within ten years to become the country's most important economic sector and to turn Sweden into a self-evident choice for global travellers" (Svensk Turism AB, 2010). In 2009, the sector had, according to Svensk Turism AB (2010), an annual turnover of 252 billion Swedish crowns (€26.29 billion; exchange rate 12 August 2015) and generated employment corresponding to 160,000 full-time jobs. Up to 2020, the Swedish tourism industry's objective is to grow the sector to a turnover of c. €46 billion and an additional 100,000 person years of employment (Svensk Turism AB, 2010). The World Economic Forum (2011) confirmed that Sweden's basis for further developing tourism is among the best in the world, even though the branding and marketing strategy of the country was identified as an obstacle to growth. Currently, a large share of arrivals (43%) is concentrated in the three summer months of June, July and August (Tillväxtverket, 2013).

Method

A multi-stage research process was used, consisting of semi-structured interviews with Swedish residents and an analysis of the literature, followed by the development of a survey instrument. During late winter and early spring 2014, 20 semi-structured interviews were conducted, using a snowball sampling approach, to generate broader insights into decision-making processes, before the survey instrument was designed. Respondents were between 23 and 65 years old, and contacted over the phone. Anonymity was assured. Interviews were recorded and transcribed. Questions asked included their preference for Sweden as a destination, the character of the holiday (beach, city, nature, etc.), length and timing of the holiday, interest in extending the stay or visiting during another time of the year, perceived expensiveness, acceptable limits to cost increases, characteristics of holiday budgets, spending, gender, age, income and country of residence. Most questions were open; some used rating scales (1−10). No major difficulties were encountered during interviews, though only few respondents were able/willing to provide detailed expenditure estimates as well as net income values. It should also be noted that estimating potential expenditures is a difficult task, and has been restricted in this study to the question as to whether holiday budgets are open or fixed.

Quantitative data were collected in Stockholm and Kalmar from May to September 2014, in locations that were deemed to be the most frequently visited by leisure tourists in each city, i.e. the historic castle in Kalmar and the old town (Gamla stan) in Stockholm. Respondents were approached every second day of the week, i.e. in a constantly changing scheme including all days of the week. Face-to-face interviews were conducted on the basis of a random sampling approach. "Tourists" were identified by initially asking each prospective respondent whether she/he indeed was a leisure tourist. Where tourists appeared in pairs/groups, one was asked to provide information. Data were collected in personal interviews, and recorded online in Survey Monkey using iPads. In total 1914 interviews were conducted, 962 in Kalmar and 952 in Stockholm, with an overall respondent distribution of 56% women and 44% men. Results from both sample sites were combined for analysis, though both initially analyzed to derive inter-regional differences.

Data were evaluated using descriptive and analytical statistical methods, i.e. significance levels are indicated where appropriate. Where less than 10 interviews were conducted with one nationality, the sub-sample size was considered too small to be included in the analysis. Outliers have been removed from the analysis in the calculation of ALS. The focus of analysis is nationality, even though it is acknowledged that analyses of other parameters, such as age, education, timing of visitation and accommodation type, are also relevant for decision-making (Martínez-Garcia & Raya, 2008). As many questions address hypothetical situations, for instance with regard to increases in length of stay, there is a potential risk of receiving socially desired answers. The potential bias is, however, considered minimal, as respondents had no incentive to exaggerate, as the purpose of the survey was communicated in a general way (survey on tourist perceptions) before questions were asked.

The distribution of nationalities in the sample differs somewhat from the distribution in official national arrival statistics (IBIS, 2014), with Germans, US-Americans, Dutch and British visitors dominating this sample, even though one would expect visitors from the Nordic countries to be the most represented. This can be explained by the fact that more than half of Norwegians visit the border areas (Västra Götaland, Värmland, Jämtland and Norbotten), whereas Danish visitors are mostly found in southwest Sweden. Because of this geographical distribution, these nationalities are underrepresented in

Kalmar/Stockholm. In comparison, Kalmar County receives 8%−10% of all German arrivals, and Stockholm 65% of US-American arrivals, explaining the domination of these nationalities in the survey (cf. Tillväxtverket, 2013).

Results

Differences between sample sites

An important general insight from the survey is that there exist significant differences between the two sample locations of Kalmar and Stockholm. This is relevant, because it means that destinations in Sweden, as in any country, have to consider the specific requirements of their visitors. Results indicate that ALS is almost four days longer in Kalmar (13.0 days) than in Stockholm (9.3 days; significant at $p < .001$). This may be explained by the fact that Stockholm is a city destination, while Kalmar also represents many visitors staying in summerhouses. With regard to length of stay, about 50% of respondents in both cities reported that they would have liked to stay longer. However, a larger share of tourists in Kalmar reported to be *not* interested in staying longer (39% compared to 29% in Stockholm; significant at $p < .001$).

The number of additional days respondents wished to stay was found to be higher among tourists in Kalmar, with a mean of 24.2 days in Kalmar, as compared to 10.6 days in Stockholm. The median was found to be seven days in both samples. Results also indicate that tourists in Kalmar are more flexible with regard to their visit: more than half (52%) in Kalmar indicated to be willing to visit at a different time of the year, compared to a third (35%) in Stockholm (significant at $p < .001$). While these results beg further evaluation, they indicate a potential to better distribute visitors in time.

Considering the perceived expensiveness of Sweden as a destination (Hall, Müller, & Saarinen, 2008), results also indicate significant differences between Kalmar and Stockholm, as tourists perceive Stockholm to be significantly ($p < .001$) more expensive with regard to accommodation, food and shopping. More tourists in Kalmar (82%) than in Stockholm (68%) reported to have an open budget (significant at $p < .001$), possibly as a result of a greater share of tourists attracted by low-cost carriers to the Swedish capital. Similarly, only 6% of the tourists in Kalmar perceived Sweden as already too expensive to return, compared to 10% in Stockholm (significant at $p < .05$). These results clearly indicate significant differences between sample sites, indicating that flexibilities vary geographically within destinations, depending on the particular type of tourist attracted.

Overall results

Before discussing differences between nationalities, this section provides an overview over the results for the whole sample. Most respondents (48.9%) reported to have visited Sweden for the first time, 12.5% took several holidays in Sweden per year, 14.4% one holiday per year, and 3.3% visited every second or third year. The remainder (20.9%) had been to Sweden before, though irregularly. Economically, 76.5% reported to have an open holiday budget, and 23.5% a fixed budget. 9.7% found that Sweden was already too expensive for holiday-making, while on the other side of the spectrum, 12.3% suggested that the cost of a holiday in the country had no importance whatsoever for their decision-making. The broad majority, 78%, expressed some price elasticity (at least 1%) when confronted with the prospect of rising costs. With regard to expenditure, 77.2% of respondents stated that they had spent as much money as expected, 15.6% had spent

more and 7.2% less than expected. In absolute terms, 69.3% had spent less than 10,000 SEK, 16% 10−19,000 SEK, 7.3% 20−29,000 SEK and 7.4% more than 29,000 SEK. (In September 2014, the last month in which the survey was conducted, one Euro was worth approximately 9.16 SEK.)

Holiday length varied, with more than half (52.6%) staying for less than 8 days, 27.0% for 8−14 days, 13.0% 15−21 days and 7.4% more than 21 days. One-third (33.6%) would not have liked to stay longer, 15.6% were undecided, but more than half (50.8%) would have liked to stay longer. Of those, 57% would have liked to stay up to 8 days longer, 22.8% 8−14 days longer and 8.0% 15−21 days longer, 12.2% would have liked to stay more than an additional 21 days. However, various obstacles were reported as to why actual holiday periods had been chosen. Almost half (49.7%) of the respondents stated that they had to return to work, 18.4% thought that they had had enough time to see everything they wanted, 8.5% were restricted by special offers, 6.4% had other obligations at home, 5.0% went on several trips, and were thus limited in their length of stay in Sweden, 4.0% were financially limited, 3.2% did not want to be away from home for a longer period, 2.7% suggested that the travel time was long, eating up holiday budget time, and 2.1% were bound by rental times (e.g. 7, 14, 21 days for summer houses). These results indicate that institutional (number of vacation days) as well as financial reasons limit length of stay. They also confirm, however, that supply side effects (rental times, special offers, number of attractions, competing holidays) limit ALS, with at least one aspect, the long journey to get to Sweden, supporting long and potentially longer stays.

With regard to the timing of their stay, 72.4% reported to prefer summer, 11.7% spring, 8.3% winter and 7.6% autumn. 45.7% could not imagine visiting Sweden other than during their favourite season, though an almost equal share (43.3%) could, the remainder being undecided. Of those being flexible, 21.8% suggested that they would be interested in all seasons, 32% in winter, 18.5% in summer, 15.0% in spring and 12.7% in autumn.

Results by nationality: repeat visitation and average length of stay

Almost half (49%) of all respondents reported to be in Sweden for the first time; repeat visitors came, in particular, from Finland (90% of Finnish visitors are repeat visitors), Denmark (89% repeat visitors), Norway (79% repeat visitors) and the Netherlands (56% repeat visitors). Results indicate considerable differences between markets: ALS may differ by up to a factor of 3 between nationalities. While the overall ALS for the survey is 11.2 days, respondents from Finland or Italy reported staying 6−7 days on average, while those from the Netherlands, Canada, South Korea, New Zealand and Australia stayed for 18 days and more. This confirms that long-distance markets plan longer stays, as overcoming larger distance has to be worthwhile in relation to length of stay (Hall, 2005). Yet, even close markets (The Netherlands) may favour longer stays, though these findings are in contrast to the national survey (IBIS, 2014), indicating an ALS of only 10.7 nights for visitors from the Netherlands. This might, however, be at least partially explained by the fact that the national survey also includes business travellers, who on average stay 2.3 nights less than leisure travellers (IBIS, 2014).

To test for significance of differences in ALS, countries were grouped. The country groups that were compared are Asia, Australia and New Zealand, British Isles, Germany, Sweden, Russia, other Scandinavian countries, other European countries, Middle East, South Africa and South America. Differences in length of stay are significant at $p < .001$. *Post hoc* tests also show that Australia and New Zealand have a significantly longer ALS

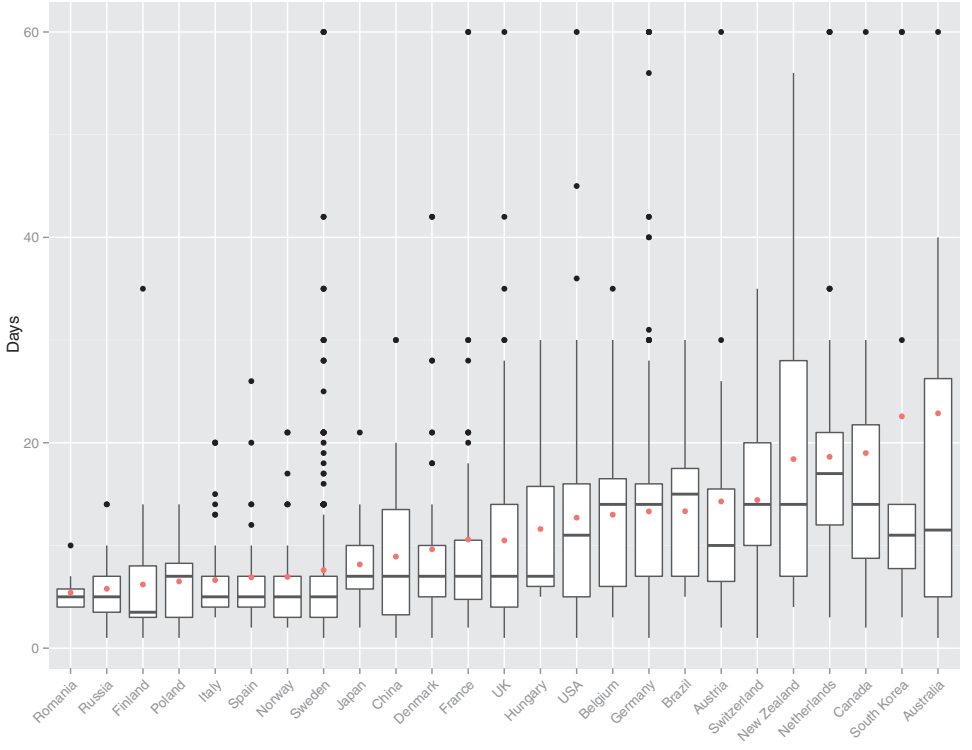

Figure 1. Variation of length of stay.
Explanation: thick black line: median; the white "box", lower end: 25% of respondents specified a value up to this value; the white "box", upper end: 75% of respondents specified a value up to this value. The box includes 50% of responses. Lighter dots within or close to white boxes represent means; black dots outliers. End of lines represent minimum/maximum values, excluding outliers. Example, Switzerland: the line starts at 1 (minimum value), the lower end of the box starts at 10, the median is at 14, the mean is 14.43, the box ends at 20, so 50% of the Swiss respondents stayed between 10 and 20 days, and the line ends at 35 (maximum value). There are no outliers for Switzerland. Outliers above 60 have been summarized as one dot at the value of 60.

than any other markets, and that Swedish tourists stay a significantly shorter time than Germans, other Europeans, Asians and North Americans. Figure 1 illustrates the variation in ALS for different markets, with variation generally increasing with ALS. An interesting result is, nevertheless, that for important markets such as Poland, Norway, Denmark, USA, Germany or the Netherlands, variation is comparably low. For other markets such as the UK or Australia, there is considerably greater variation.

Against this background, Figure 2 illustrates differences in the various markets' interest to extend their stay in Sweden. Results indicate that in all markets there exists a desire to spend more time in the country, though inter-country-specific differences are only significant ($p < .001$) for Swedes to show a shorter potential ALS extension than other European countries (excluding Scandinavia and UK). Yet, there appears to be a potential to increase ALS, particularly in countries such as the Netherlands, Germany and Switzerland, where the effort to travel to Sweden – often by car – is considerable, and may thus increase interest in staying longer. It is also notable that for some countries, such as Finland or Poland, Italy, Spain and Norway, the stated wish to extend ALS would double the

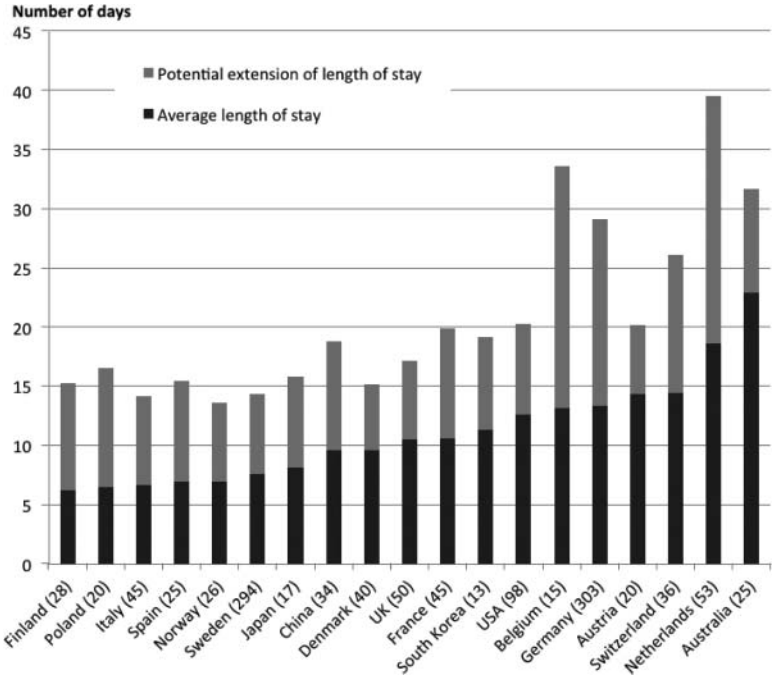

Figure 2. Average length of stay and potential added average length of stay.
Note: Figures in brackets indicate the number of respondents from each country.

actual ALS. This result is particularly interesting, given that it also holds up when the median of all answers is calculated.

These results raise the question as to why respondents do not spend more time in Sweden than they actually do. As outlined earlier, there exist various institutional, financial and supply side constraints, with the three major barriers being significantly different between markets ($p < .001$): (1) a limited number of vacation days; (2) reliance on package tour offers with fixed lengths, or fixed rental times for transport (e.g. camper van); and (3) financial resources. While neither limited vacation days nor financial resources can be addressed in marketing, fixed package offers may be designed differently. This obstacle was mentioned by long-haul markets, including Australia, Japan, USA and New Zealand, and appears to reflect that these markets will more often rely on pre-arranged tours with a fixed length of stay. Given that the main cost for these markets is transport, additional days of stay (accommodation) will add a comparably small cost, and the design of packages for these markets could be reconsidered.

Timing of visitation

Results revealed considerable differences in willingness to visit Sweden during a different time of the year (Figure 3). These differences were found to be significant between markets ($p < .001$). Visitors from Romania, Canada, the US, Brazil, Hungary and Italy were among the least flexible, with 10%−30% stating that they could imagine to visit during another time of the year. In contrast, at least 50% of tourists from Denmark, Japan, Poland, New Zealand, and Norway reported to be principally interested in visiting during other times of the year. The most interesting nationalities would be those with large

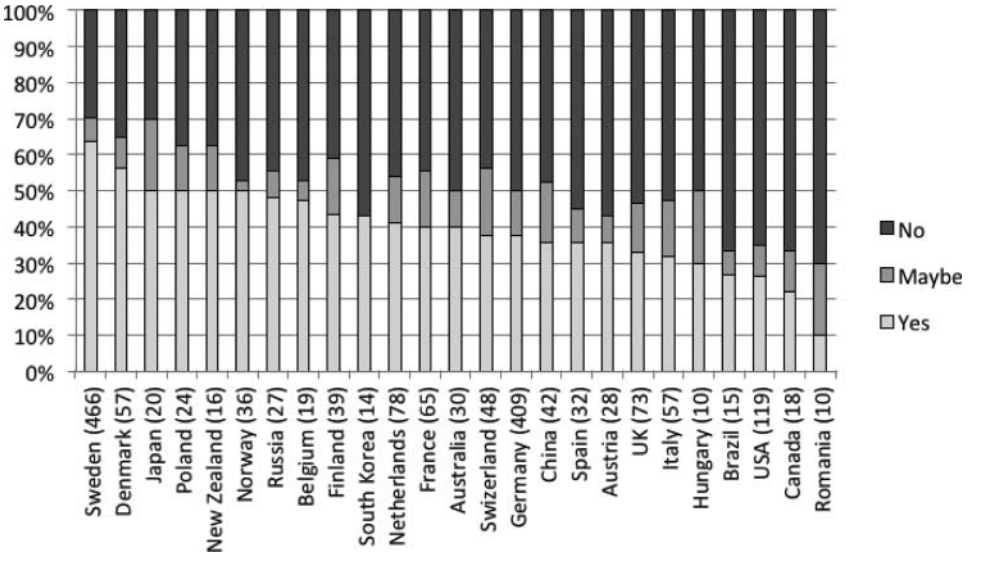

Figure 3. Visiting during another time of the year?

shares of visitors open to visit anytime, including, in particular, guests from Finland, Sweden, Norway, the UK, Belgium, the Netherlands, Italy and Australia (>20% interested to "visit anytime"; with a 40% share among Finnish and Swedish tourists).

Spending and budgets

Noting the limitations in spending data (see Method section), results confirm considerable differences in expenditure depending on nationality, both in overall and per day terms. With regard to overall expenditure, two results appear to be of importance: first, partially because of their shorter ALS, visitors from Finland, Poland and Sweden spent considerably less (one-third to one-sixth) than visitors from Switzerland and Canada, the US, Australia and Japan (Figure 4). Second, transport costs are particularly high for long-haul markets, confirming that additional days spent in Sweden would increase overall costs only marginally. On a per day basis, average spending varies between 400 SEK (South Korea) and more than 2100 SEK (Japan) per person per day (Figure 5).

To understand flexibilities in spending, visitors were asked whether they had fixed or open holiday budgets. Results indicate that, over all nationalities, at least half of the visitors are not limited in their spending (Figure 6) although some of the most distant markets (Australia, Canada, China and New Zealand) also had the lowest levels of open budget. These results can be compared to willingness to stay longer, indicating that, throughout the sample, 24% of tourists with fixed budgets are not interesting for further market development, while 36% have both open budgets and would like to stay longer.[1] The analysis also shows that a larger share of such "interesting" tourists can be found in Kalmar (61%) than in Stockholm (39%) ($p < .001$), calling for closer consideration of the regional potential for destination marketing. Furthermore, most of the tourists with open budgets originate in Europe (47%), while long-distance visitors are comparably more restricted (19%) (Figure 6; $p < .001$). Analysis also reveals that repeat visitors have a greater potential than first-time visitors, and that the age group with the greatest potential is between 31 and 55 years old ($p < .001$).

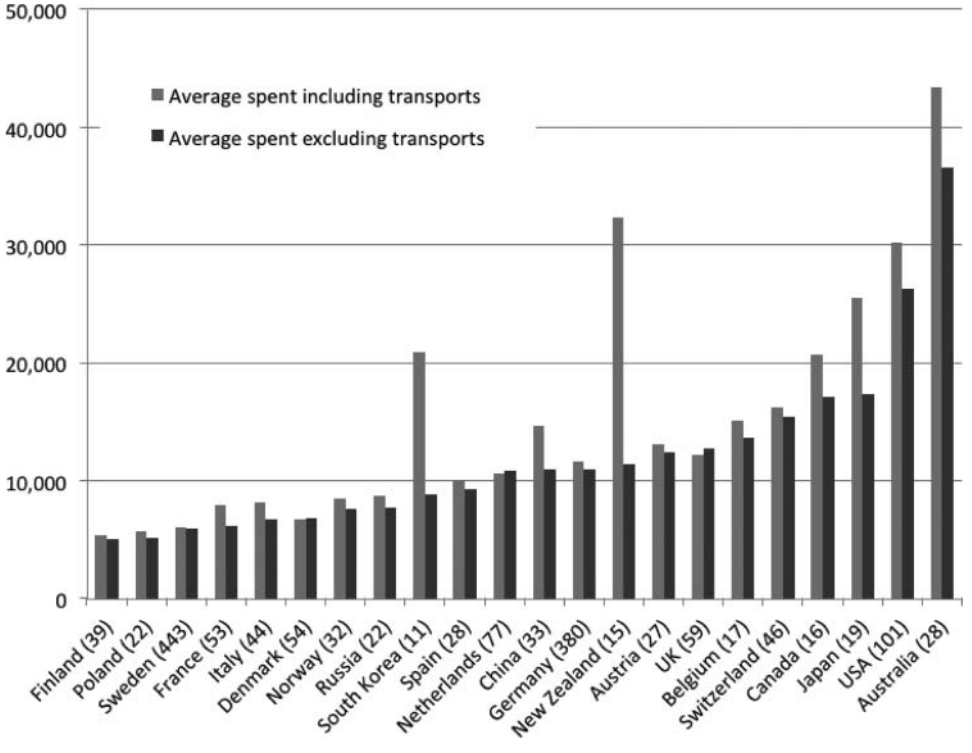

Figure 4. Spending per trip including/excluding transport (1 Euro = 9.16 SEK (September 2014)).

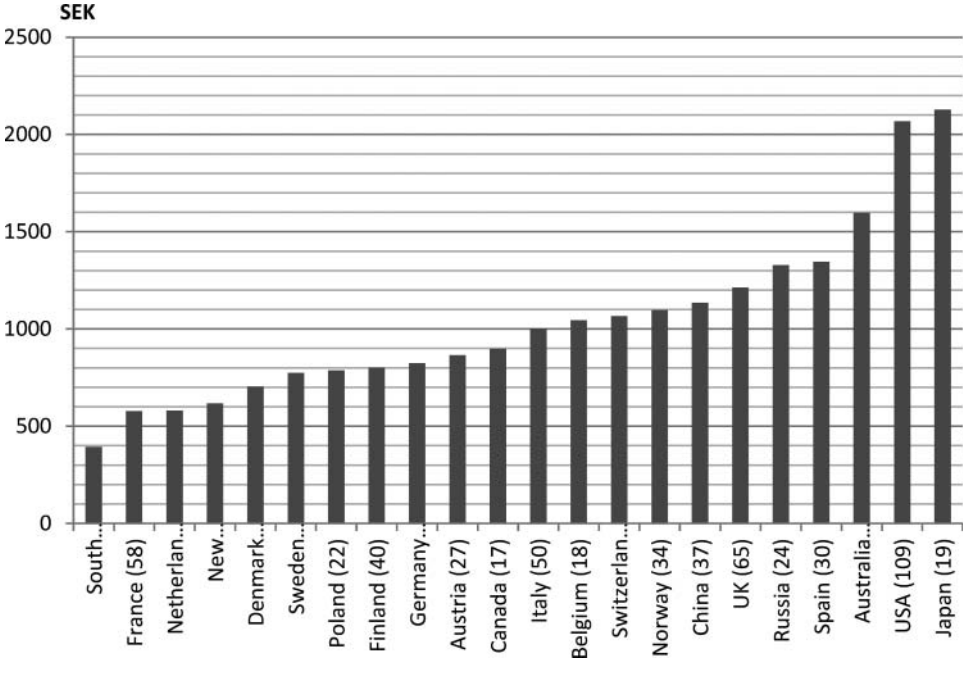

Figure 5. Overall spending per day.

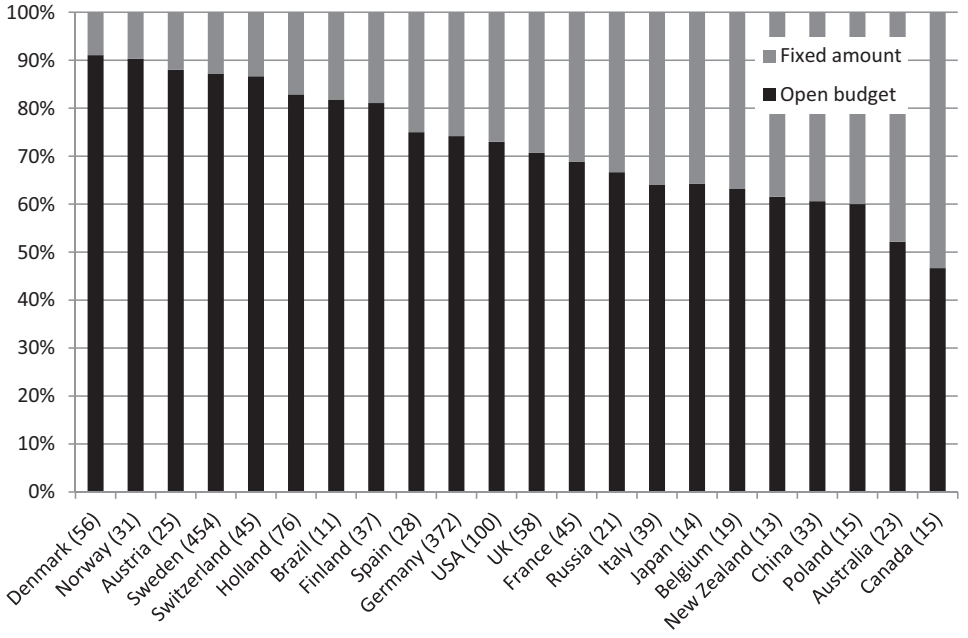

Figure 6. Open and fixed holiday budgets by nationality.

Figure 7 compares average spent per day and average length of stay. The USA and Australia appear as significant markets, although in the case of the latter their budget is often more limited. Such information can help to identify those markets which have both potential to significantly increase their length of stay and that have a high average spend and thereby target marketing and promotional efforts.

Price perceptions

The analysis becomes even more complex considering market stability. For this purpose, visitors were asked to indicate their perception of price levels. Figure 8 shows that Sweden is considered expensive by most markets, though not excessively so. Two nationalities in particular, Norwegians and Danes, consider Sweden to be less costly, probably because both countries have higher consumption price levels than Sweden. In contrast, Polish guests, in particular, perceive Sweden as expensive, which is of importance given the Swedish focus on this new market. Other markets perceiving Sweden as expensive include Spain, New Zealand, USA and Italy. These results are in line with Poland, New Zealand and Italy also being among the countries citing costs as the main reason to limit their length of stay in Sweden. With regard to subsectors (accommodation, food and beverages, shopping), results indicate that in particular food and beverages are considered expensive. Results also indicate that it is mostly tourists from outside Europe (16%) who consider Sweden as already too expensive to return ($p < .001$). This share is lower in Europe (7%) and all of Scandinavia (5%), though it is also 4% of Swedes (all $p < .001$) considering their own country as too expensive for holiday-making. This share should be closely observed, as it may predict patterns of outgoing tourism, with, for instance, recent findings in Norway indicating that the expenditure of Norwegians travelling abroad vastly

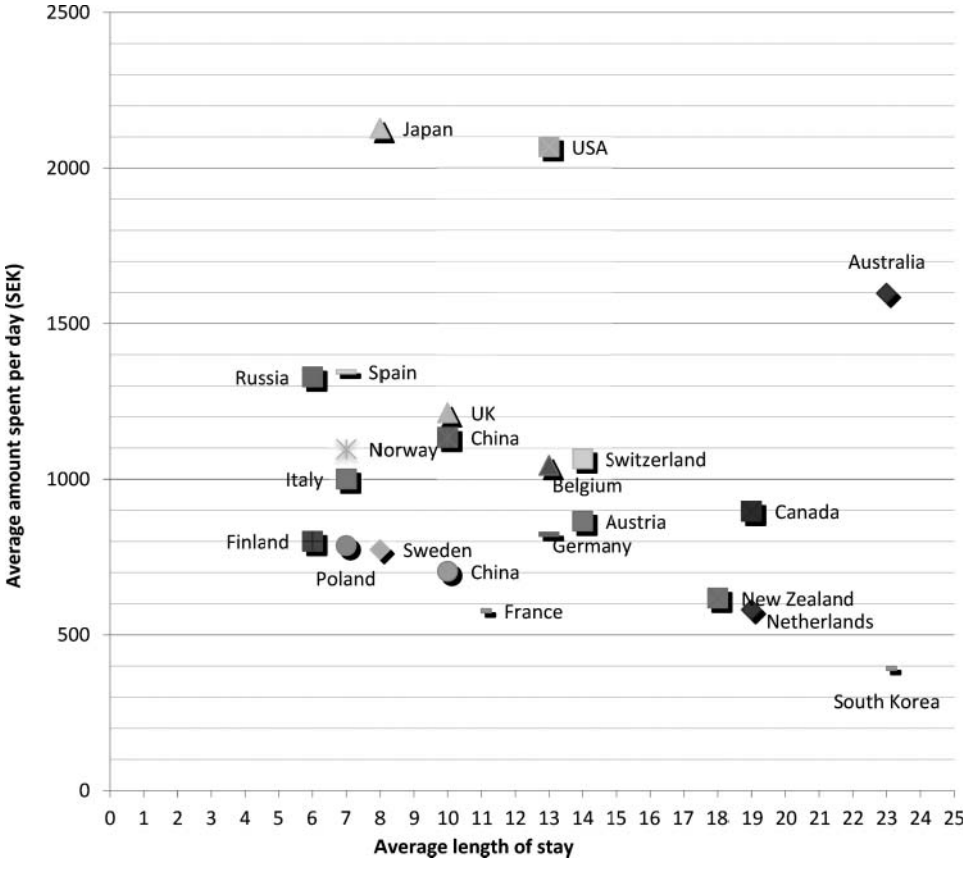

Figure 7. Average spent per day and length of stay.

and increasingly exceeds the expenditure of tourists in Norway (Kildal Iversen, Haukland Løge, Jakobsen, & Sandvik, 2015).

Questions also addressed how much prices could increase before Sweden would become too expensive. Results indicate that, in particular, visitors from Brazil (27%), Australia (25%), Poland (17%) and USA (16%) already consider Sweden as too expensive to return. In contrast, 26% of Danes, 21% of Swiss, 18% of Dutch and 15% of Germans stated that the cost of a holiday in Sweden had no relevance. However, overall results indicate considerable price elasticity among tourists, even under scenarios of significantly higher costs. Respondents were also asked which services or products they perceived as the most expensive. This question received 599 individual answers, with restaurants/food mentioned by 40% of respondents, followed by alcohol (18%), public transport (15%), accommodation (14%), entrance fees (9%) and bridge fees (3%; Öresund bridge, only mentioned in Kalmar).

Discussion

Current visitor maximization strategies in Sweden, as envisaged by industry, have a focus on employment and turnover growth. The industry's "National strategy for tourism" highlights a wide range of barriers to growth, including longer term increases in oil prices,

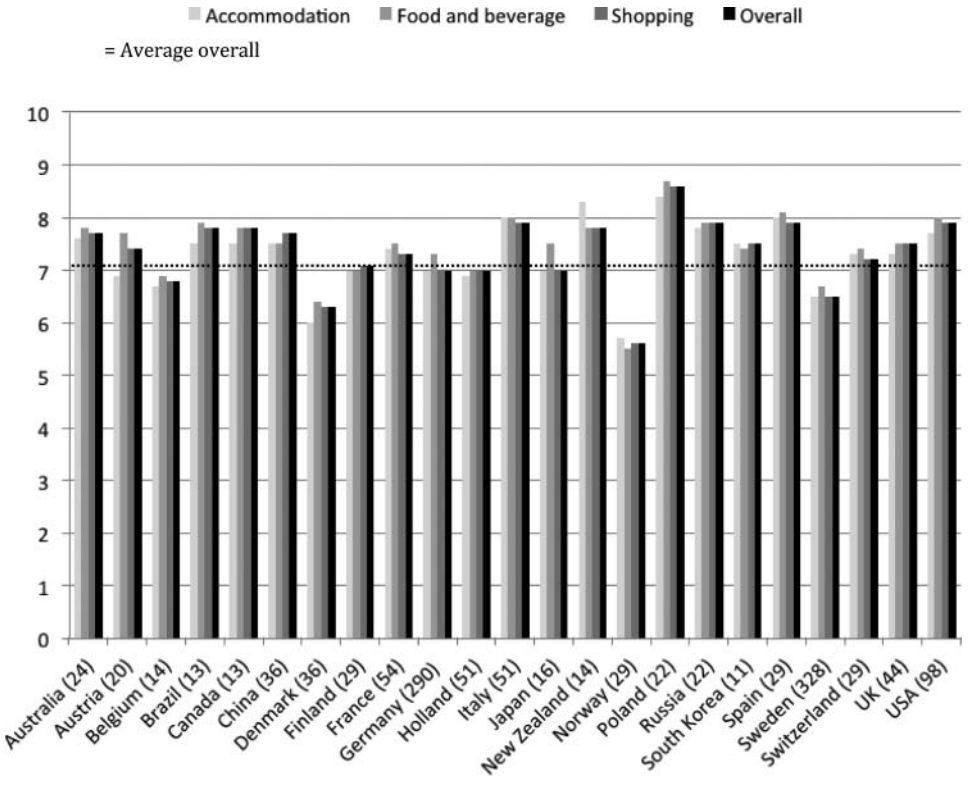

Figure 8. Price perceptions of Sweden by sub-sector (1: cheap−10: very expensive).

exchange rates, taxes and regulation, profitability, and a wide range of other global and national obstacles (Svensk Turism AB, 2010). Seasons are mentioned as a competitive disadvantage for Sweden, but the country is seen to be climatically profiting from global warming due to the Mediterranean becoming "too hot" for vacations. Infrastructure development is considered to be a necessity under scenarios of growing arrival numbers. Sustainability is mentioned throughout the strategy document, even though it remains unclear how sustainability is defined, and which practical implications – if any – this would have for destination management. In contrast, expenditure and length of stay as key variables in destination management are not mentioned, nor are vulnerabilities arising out of price sensitivities in specific markets.

This perspective raises many questions, both in relation to the literature of sustainable tourism and the results of this research. First, the strategy document is not explicit about the number of visitors that would have to be attracted in order to achieve growth objectives (Svensk Turism AB, 2010). Yet, marketing efforts focused on countries, target groups, brands, topics, offers, co-operation and communication are mentioned as focus areas. Growth in infrastructure to accommodate tourist arrival growth is consequently implicit as a precondition for development (cf. Khadaroo & Seetanah, 2007). Furthermore, desired target groups need to be considered as particularly energy-intense (Gössling & Andersson, 2015), and anticipated growth in the Swedish tourism system will cause an increase in greenhouse gas emissions. Even though tourism already accounts for a significant share of Swedish emissions, its contribution is likely to increase (Gössling & Hall,

2008). With continued growth in tourism at rates approaching 10% per year and contrasting national climate goals envisaging zero net emissions of greenhouse gases by 2050 (Naturvårdsverket, 2014), it is difficult to see how such diverging pathways could meet. Yet, achieving sustainability is considered a small obstacle in the strategy document, despite national commitments to reduce emissions, thus representing a green growth paradox that is also evident elsewhere in tourism (Hall, 2015). There are several possible reasons for this paradox in the Swedish case that may operate in isolation or in combination with each other. First, that sustainability is only understood or framed in a very narrow set of parameters that ignores emissions. Second, that the tourism strategy and national sustainability goals, including for emissions, are developed through different and unlinked governance processes. Finally, sustainability may be understood in policy terms more with respect to market position than something that actually requires any significant changes to how the industry operates.

Economically, growth in tourism systems is challenged by exchange rates, as exemplified by the 2014/2015 value loss of the Russian Ruble, significant and rapid fluctuations in oil prices, climate change mitigation policies, destination cost increases, and declining wealth in traditional markets due to financial crises. Yet few of these issues are considered in the strategy document. Maximization strategies may thus be weighted against opportunities to optimize markets, both with a view on expenditures and market stability. In this regard, the results presented in this paper have provided some new insights. First, findings confirm that spending and ALS vary between different nationalities, and depend on institutional, financial and supply-side aspects, as well as socio-demographic variables (cf. BarOn, 1975; Baum & Hagen, 1999; Hartmann, 1986). Furthermore, this research suggests that there exist considerable opportunities to increase length of stay, to stimulate spending and to influence visitation times, and that it would be meaningful for destinations to conduct research into the specifics of markets to improve overall expenditure and better distribute visitation in time. It is notable, for example, that return visitors, i.e. those who are already clearly favourably disposed to visit Sweden, also indicated a willingness to extend their stay, providing a ready focus for marketing campaigns.

Key insights include that 76.5% of visitors reported open holiday budgets, while 78% expressed some degree of price elasticity, and 12.3% even suggested that the cost of a holiday in the country had no importance. More than half of all respondents (50.8%) would have liked to stay longer, and of these, more than 10% reported to have been restricted by the packages offered. Of the 43.3% stating to be interested to visit during another time of the year, 21.8% considered all seasons, and 32.0% winter. With regard to market stability, most repeat visitors came from Finland (90% repeat visitors), Denmark (89% repeat visitors), Norway (79% repeat visitors) and the Netherlands (56% repeat visitors). These markets are particularly interesting in terms of continued visitation, but also with regard to their economic resilience: Denmark and Norway are the two countries that perceive Sweden as least expensive, which may be related to the high extent of repeat visitation, and 26% of Danes, along with 18% of the Dutch, state that the cost of a holiday in Sweden has no relevance for their decision-making (this is also true for 21.0% of Swiss and 15.0% of German tourists). Visitors from Finland and Norway also stated to wish to stay longer, on average by a period of time that would double the actual period of stay in the country. More than 40% of Finish visitors, and 20% of Norwegians and Dutch, also reported to be interested in visiting Sweden during any time of the year. These markets may thus be seen as "interesting" nationalities, along with those tourists with open budgets and an interest to stay longer. Such short-haul markets may also prove particularly

attractive should compulsory carbon offsetting measures be imposed in the European or global context, as has been suggested (Gössling, Scott, & Hall, 2015). Seen over the whole sample, the market with the highest potential is European repeat visitors in the age group 35−55 years. Long-haul markets, on the other hand, may be particularly interesting in terms of flexible packages that allow extending ALS. Overall, it would be worthwhile undertaking further analyses to identify the willingness of different visitors to pay for different tourism experiences, as well as potential changes in length of stay they would consider.

Simultaneously, research has addressed concerns of stability, i.e. the price sensitivity of different markets. Results indicate that it is mostly tourists from outside Europe (16%) that consider Sweden expensive ($p < .001$) with, in particular, visitors from Brazil (27%), Australia (25%), Poland (17%) and USA (16%) stating that Sweden is too expensive to return. At the other end of the spectrum, a comparably large share of Danes, Swiss, Dutch and Germans (15%−26%) consider price levels as being of no relevance for decision-making. This does not necessarily mean that these markets can be easily developed, however. For example, while Dutch tourists wish to spend considerably longer periods of time in Sweden, they are also among the most restricted in terms of vacation days.

Results may be used to develop new indicators for policy-makers and destination managers to reduce destination vulnerability, or, given the purpose of this paper to discuss optimization strategies, by strengthening internal and external resilience. Internal resilience would, in this paper, refer to dependency structures within the destination, related to, for instance, arrival numbers or average spending per tourist. Internal resilience could be improved by attracting, as an example, a higher share of returning guests, or visitors who are price-inelastic high spenders, i.e. not affected by price increases. The potential non-linearity of expenditure needs to be acknowledged, however (e.g. Chang, Chen, & Meyer, 2013). External resilience relates to factors outside the influence sphere of the destination, such as oil price developments, global economic development, or events such as terror attacks or pandemics. To strengthen external resilience, it may be possible to develop closer markets that require less energy for travel, that are economically less dependent on global economic growth, better prepared to deal with health crises, or that can generate a more steady flow of visitors throughout the year. Clearly, not all of these factors can be addressed by the findings of this research, but it would seem possible to optimize the tourism system to become more resilient by considering various new indicators for destination management. These could include the following:

- Share of price-insensitive markets (already perceiving Sweden as very expensive),
- Share of markets with above 75% of open budget,
- Share of markets with >10 days of ALS and interest to stay >5 additional days.

Future research may use these results as a starting point for continued research into flexibilities and opportunities to increase spending. Given that more than three-quarters of visitors report open holiday budgets, and 7% underspend their expected budgets, a better understanding of the mechanisms to increase spending in the destination is thus of particular relevance. Earlier insights on impulse purchases (Laesser & Dolnicar, 2012), and the role of such varied factors as, for example, excitement (Mehmetoglu, 2007), motive (Thrane, 2002) or what may be called “frustrated consumption”, i.e. missed opportunities to spend, further research is very likely to highlight opportunities for increasing tourist spending in Sweden.

The goal of this paper was, with a focus on Sweden, to investigate whether there is an alternative to maximization strategies focusing on arrival growth. As has been noted, considerable research on expenditure, length of stay and timing of the holiday, as key destination management parameters, has been conducted by DMOs as well as academic researchers. This research reveals that current thinking by DMOs is still dominated by maximization perspectives, even though regions and countries as diverse as Western Australia, Kenya, New Zealand, Hong Kong, the UK or Malaysia have begun to recognize the relevance of optimization (Dwyer et al., 2014). This research has thus sought to enhance understanding of flexibilities in key destination management variables from the viewpoint of tourists, with a focus on optimization rather than only maximizing yield, as has been the case in the precedent literature (e.g. Becken & Simmons, 2008; Dwyer et al., 2007). Although the results are immediately significant for Swedish tourism, they have a wider relevance, specifically for destinations already exploring optimization strategies, such as Western Australia (Dwyer et al., 2014).

In terms of the Swedish tourism system, the results provide insights into optimizing yield from existing markets in the short term, and in optimizing market composition in the longer term. Results illustrate that Denmark, Norway and the Netherlands and, to a lesser extent, Belgium and Germany, are all countries with positive perceptions of Sweden and a desire to significantly increase length of stay while having the budgetary resources to do so. The adoption of optimization strategies with respect to market composition and yield in the Swedish case therefore would simultaneously contribute to a more internally and externally resilient tourism system from both economic and environmental perspectives, and represent a step forward in the search for the "ideal tourist". This will support economic stability and competitiveness as well as sustainability, with greater dispersion of tourist arrivals in time and space. Such measures are significant as they help lay the foundations for greater economic resilience of a tourism system susceptible to changing eternal variables and crises, especially given that economic resilience is also founded in the distribution of income and revenues, and distributive effects (Carrascal Incera & Fernández, 2015).

This study has implications for the implementation of more sustainable forms of tourism generally. First, there is the need to understand the complexity of markets, and their complex relationships with travel decision-making and behavioural change. At market level, the fact that so many people in *specific groups* are willing to pay more for their experiences gives a green light to a range of pro-sustainable tourism developments that are frequently rejected because they might cost a little more (see Dolnicar, 2010). Second, it informs researchers that simply urging the industry and the public sector to adopt more sustainable forms of tourism is not enough: detailed and plausible evidence is required to guide and encourage change while the criteria by which different stakeholders, including different agencies, understand sustainability in policy and strategy terms also need to be explicitly stated, clear and consistently used. Third, it is clear that there are substantial institutional barriers to change. Most importantly, there is the need to encourage DMOs and tourism ministries to look beyond the annual increase in the numbers of visitor arrivals that has long characterized the marketing fundamentalism so often attached to tourism destination marketing and policy-making. Instead, there needs to be, even if in narrowly defined economic terms, a much greater focus on yield at the destination level: tourism marketing strategies and the accompanying research must be about more than unsophisticated growth. In the same way that crudely measured economic growth is rejected as the basis for resilience of tourism systems from an environmental standpoint (Hall, 2015), so it is that maximization strategies need to be rejected from a tourism economic and marketing perspective, as well as from the viewpoint of

sustainability scenarios. Arguably, however, to do so may require a more sophisticated understanding of the inseparability of the resilience of tourism systems and the nature of the consumption of the tourism market than has hitherto been the case. Future research may be able to address flexibilities not only on the basis of nationalities, but also to analyze the importance of age, gender, occupation, as well as aspects of family composition (e.g. Bernini & Cracolici, 2015; Jang & Ham, 2009; Thrane & Farstad, 2011), all of which have been outside the scope of this exploratory study.

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Note

1. Percentages are based on respondents who have responded to the two relevant questions ($n = 1538$).

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