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Sweden

Tourism in the economy

Sweden's tourism has been growing steadily over the past ten years and is today an important sector for the growth of enterprise and jobs, as well as the expansion of local economies in the country. The Swedish Agency for Economic and Regional Growth (*Tillväxtverket*) reported an increase of 7.5% in tourism's export value in 2012, measured as foreign visitors' consumption in Sweden, to SEK 106.5 billion – almost 85% more than iron and steel exports and almost three times more than the value of Swedish car exports. This represented a growth of 162 % over the last 13 years.

Total turnover for tourism in Sweden in 2012 rose by 4.8% to almost SEK 275 billion. Employment and export value also increased. Approximately 45% of the total turnover was attributed to Swedish leisure travellers, while about 17% was generated by Swedish business travellers, and the balance of 38% came from foreign visitors.

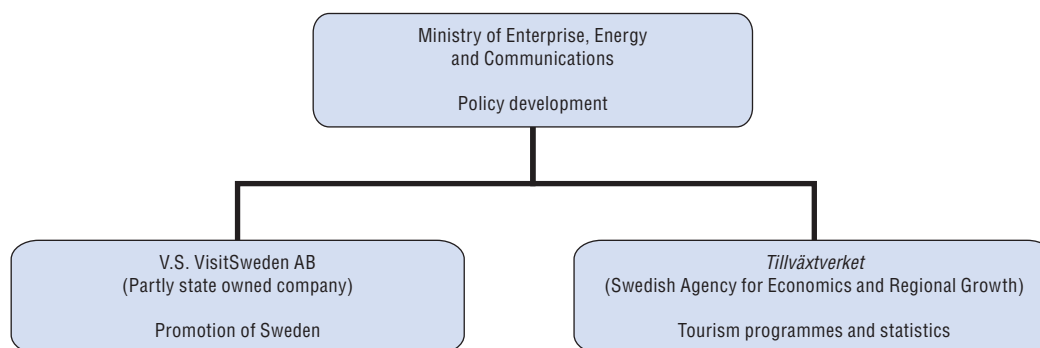
The tourism industry's ability to boost employment is a key factor in the national economy, especially its ability to create jobs for young people. While employment in many traditional primary industries in Sweden has declined, tourism has generated 37 100 new jobs since 2 000. There were some 168 000 jobs in the tourism industry in 2012.

Provisional data for 2012 puts the growth of international arrivals at 3.9%, to 15.98 million, according to *Tillväxtverket*, compared to 15.4 million in 2011. Of these, 10.9 million (68%) were overnight stays of a minimum one night (+10%). International tourism receipts were estimated at USD 12 billion for 2012 – up 17% in local currency terms over 2011, with the first few months of 2013 recording a further 2.6% rise.

Tourism organisation and governance

The current organisational structure of Sweden's tourism at national level was determined by an act of parliament in 2005. Two organisations, the government agency *Tillväxtverket* (the Swedish Agency for Economic and Regional Growth) and the partly state owned company VisitSweden AB, are responsible for tourism at the national level (Figure 1).

Tillväxtverket focuses on tourism industry issues, and develops activities to promote tourism initiatives and entrepreneurship. The agency is also responsible for official tourism statistics and the production and dissemination of knowledge about the development of tourism and its effects on the Swedish economy. *Tillväxtverket* has been tasked with the responsibility of co-operation at the national level between different governments agencies involved either directly or indirectly in tourism. *Tillväxtverket* has a regional network, with offices across the country handling issues related to structural funds.

Figure 1. **Sweden: Organisational chart of tourism bodies**

Source: OECD, adapted from the Ministry of Enterprise, Energy and Communications, 2014.

VisitSweden (formerly the Swedish Travel and Tourism Council) is a company owned jointly by the government and the Swedish tourism industry, and is responsible for marketing Sweden as a tourism destination abroad. VisitSweden AB has 12 offices in prioritised international markets.

In addition, there are tourism bodies at both regional and local levels, which are managed by the regions and local communities, respectively. There are no formal links between the different administrative levels.

Tourism budget

The budget for tourism is integrated within the general budget for Tillväxtverket, and has for the last few years been stable at around SEK 50 million, of which some 25% is used for the purchase of statistical data and surveys. The government funding for VisitSweden AB is about SEK 120 million, which is matched by a similar contribution from the industry, mainly in the form of partnership activities.

There are no specific tourism taxes and funding therefore comes mainly from general government budgets. From time to time, however, specific initiatives are financed by the government, in addition to its regular contribution to tourism.

There are no specific funds for tourism set up by the government, with the exception of a foundation established to promote knowledge and development within the tourism sector. The foundation finances scholarships, and an award of SEK 100 000 each year (Stora Turismpriset) to tourism professionals who have developed innovative, high-quality, sustainable products and services.

The industry and the labour organisations set up a fund in 2009, with a yearly contribution of SEK 8 million to support projects in research and innovation.

Tourism-related policies and programmes

The aim of the Swedish government's tourism policy is that Sweden should be a highly attractive tourism destination with competitive long-term tourism, contributing to sustainable growth and increased employment throughout the country. In order to achieve these goals, there is a strong need for co-operation between the different tourism stakeholders in Sweden.

To increase the competitiveness of Swedish destinations and small and medium-sized enterprises (SMEs) in tourism, the government allocated SEK 60 million in 2012 to a programme for sustainable destination development. Tillväxtverket is responsible for the

programme and, in close co-operation with VisitSweden, has selected five pilot destinations that are perceived to have strong potential to attract international tourism. The programme includes activities related to increasing competitiveness among SMEs within destinations, i.e. business development activities, quality assessment, sustainable development, etc. An important objective is to disseminate the knowledge and tools that are developed within the programme to the whole tourism sector. The government also reduced VAT on restaurants and catering services in 2012 to stimulate employment (Box 1).

Box 1. Reduction in VAT on restaurants and catering services

With the primary goal of stimulating employment, VAT on restaurants and catering services in Sweden was reduced from 25% to 12% in January 2012. Several government agencies have been commissioned to evaluate the impact of this reform on consumer prices, employment, business and administration.

The National Institute of Economic Research (*Konjunkturinstitutet*) issued a preliminary report in June 2012 on the effects of the reform on consumer prices in restaurants. According to its findings, prices fell by 3% between December 2011 and April 2012. This suggests that the reform has been positive, at least in the short term.

Based on an initiative from the Västra Götaland region, *Tillväxtverket* has contributed to the development of a national quality and sustainability assessment system for entrepreneurs and activities within the tourism sector. The system, which now is established at national level, is called “Swedish Welcome” and will be operational sometime during 2014. The initiative is now being financed mainly by *Tillväxtverket*.

Within the industry, a common tourism strategy was developed in the summer of 2010. The strategy has been very well received by the industry and has resulted in several similarly focused regional strategies.

Statistics and economic evaluation

Tillväxtverket is tasked with the responsibility of providing official statistics within the field of tourism. The statistics include trends data on accommodation, the national Tourism Satellite Account (TSA), a border survey among departing foreign visitors (IBIS), and statistics covering overnights in guest marinas and visitor numbers at attractions. *Tillväxtverket* also commissions a survey on domestic and international travel by Swedes (TDB).

Statistical profile

Table 1. **Sweden: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips		..	..	..	..	..
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation ¹	Thousand	38 133	38 681	39 603	39 743	39 916
Hotels and similar establishments ¹	Thousand	24 813	24 658	25 795	26 129	26 587
Other collective establishments ¹	Thousand	13 320	14 023	13 808	13 614	13 329
Domestic travel receipts		..	..	..	..	..

1. Commercial accommodation.

Source: Swedish Agency for Economic and Regional Growth.


StatLink  <http://dx.doi.org/10.1787/888932989247>

Table 2. **Sweden: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals ¹	Thousand	..	..	..	15 381 p	15 981 p
Overnight visitors (tourists) ¹	Thousand	..	..	..	9 959 p	10 914 p
Same-day visitors (excursionists) ¹	Thousand	..	..	..	5 421 p	5 067 p
<i>Top markets</i>						
United Kingdom	Thousand	..	..	..	5 240 p	6 863 p
Denmark	Thousand	..	..	..	1 880 p	2 156 p
Germany	Thousand	..	..	..	1 518 p	1 801 p
Finland	Thousand	..	..	..	1 313 p	1 327 p
Norway	Thousand	..	..	..	1 291 p	1 205 p
Nights in all means of accommodation ²	Thousand	11 964	12 330	12 803	12 880	12 774
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Million SEK	81 500	88 900	91 400 p	99 100 p	106 500 p
International travel receipts	Million SEK	73 900	78 500	79 900 p	89 400 p	104 500 p
International passenger transport receipts	Million SEK	7 600	10 400	11 500 p	9 700 p	2 000 p

1. Based on border survey.

2. Commercial accommodation.

Source: Swedish Agency for Economic and Regional Growth, IBIS 2012.

StatLink  <http://dx.doi.org/10.1787/888932989266>

Table 3. **Sweden: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures		..	..	..	..	..
Overnight visitors (tourists)	Thousand	13 291	11 699	13 042	14 651	15 548
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure		..	..	..	..	..
International travel expenditure	Million SEK	97 200	91 200	95 600	102 600	109 100
International passenger transport expenditure		..	..	..	..	..

Source: Swedish Agency for Economic and Regional Growth.


StatLink  <http://dx.doi.org/10.1787/888932989285>

Table 4. Sweden: Enterprises in tourism
Number of establishments

	2008	2009	2010	2011	2012
Total tourism enterprises
Tourism industries
Accommodation services for visitors
Hotels and similar establishments ¹	2 022	2 028	2 051	1 998	2 003
Food and beverage serving industry ²	18 348	18 987	18 297	18 687	19 050
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

1. Hotels.

2. Restaurants.

Source: Swedish Agency for Economic and Regional Growth.

StatLink  <http://dx.doi.org/10.1787/888932989304>

Table 5. Sweden: Employment in tourism
Number of employees

	2008	2009	2010	2011	2012
Total tourism employment (direct)	131 359	139 820	132 819 p	137 956 p	145 225 p
Tourism industries	..	..	..	..	..
Accommodation services for visitors ¹	55 016	59 057	56 501 p	58 882 p	62 549 p
Hotels and similar establishments	..	..	..	..	..
Food and beverage serving industry	..	..	..	..	..
Passenger transport	17 340	17 656	18 560 p	18 114 p	18 357 p
Air passenger transport	..	..	..	..	..
Railways passenger transport	..	..	..	..	..
Road passenger transport	..	..	..	..	..
Water passenger transport	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..
Transport equipment rental	..	..	..	..	..
Travel agencies and other reservation services industry	10 977	9 309	9 564 p	9 827 p	10 476 p
Cultural industry ²	11 209	12 497	11 202 p	11 737 p	13 245 p
Sports and recreation industry	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	30 235	35 524	31 705 p	33 033 p	33 699 p
Other country-specific tourism industries	..	..	..	..	..
Other industries	6 582	5 777	5 287 p	6 363 p	6 898 p
<i>Gender breakdown</i>					
Male (% of total tourism employment)	..	..	..	..	..
Female (% of total tourism employment)	..	..	..	..	..

Note: Full-time equivalent.

1. Hotels and restaurants.

2. Includes sports and recreation.

Source: Swedish Agency for Economic and Regional Growth.


StatLink  <http://dx.doi.org/10.1787/888932989323>

Table 6. Sweden: Internal tourism consumption
Billion SEK, 2012

	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	169 p	107 p	275 p
Consumption products	..	..	..
Tourism characteristic products	..	..	..
Accommodation services for visitors	41 p	6 p	47 p
Food and beverage serving services	18 p	19 p	38 p
Passenger transport services	..	..	..
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	30 p	15 p	46 p
Transport equipment rental services	..	..	..
Travel agencies and other reservation services	15 p	0 p	15 p
Cultural services ¹	10 p	7 p	17 p
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	49 p	65 p	114 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

1. Includes recreation.

Source: Swedish Agency for Economic and Regional Growth, Statistics Sweden.



StatLink  <http://dx.doi.org/10.1787/888932989342>

Table 7. Sweden: Key economic indicators
Percentage

	2008	2009	2010	2011	2012
Tourism GDP (direct) as % of total GDP	2.8	3.1	2.9 p	2.9 p	3.0 p
Total tourism employment (direct) as % of total employment	..	..	..	..	..

Source: Swedish Agency for Economic and Regional Growth, Statistics Sweden.

StatLink  <http://dx.doi.org/10.1787/888932989361>

For more information

Ministry of Enterprise, Energy and Communications
Swedish Agency for Economic and Regional Growth
VisitSweden
Statistics Sweden

www.sweden.gov.se
www.tillvaxtverket.se
www.visitsweden.com
www.scb.se