

Sweden

Tourism in the economy and outlook for recovery

Tourism grew steadily prior to the COVID-19 pandemic and is an important contributor to the Swedish economy and labour market. Tourism's direct share of the Swedish economy had been relatively stable at around 2.6% of GDP, but dropped to 1.7% in 2020, with a small increase in 2021 to 1.9%. On average, 101 000 people were employed in tourism in 2021, equating to 94 303 full-time jobs. This was 1 590 people fewer than in 2019.

Sweden registered 43.3 million tourist nights in 2020, a decline of 36% from 2019. International nights fell by 70% to 5.2 million nights, while domestic nights decreased by 24% to 38.1 million nights. In 2021, international nights increased to 7.3 million, a 40% increase compared to 2020.

Domestic nights increased by 23% to 46.9 million nights in 2021, only 5.8% below 2019. During the pandemic, domestic tourism in Sweden increased, especially in rural areas. In 2021, 86% of total tourist nights were domestic, up from 74% in 2019.

Total tourism expenditure in 2021 was SEK 249 billion, an increase of 18% compared to 2020. International tourism had a turnover of SEK 57 billion in 2021, representing 23% of total expenditure. Germany became the largest international market, overtaking Norway, with almost 1.7 million nights in 2021.

Tourism governance and funding

The Swedish Agency for Economic and Regional Growth, Tillväxtverket, is responsible for developing tourism at the national level. Visit Sweden, fully owned by the government, markets Sweden as a tourist destination internationally. Both organisations report to the Ministry of Enterprise and Innovation.

Tillväxtverket develops, implements, and supports knowledge-based initiatives and activities to promote tourism sector development and entrepreneurship. The Agency is also responsible for official tourism statistics and the production and dissemination of knowledge on tourism and its effects on the Swedish economy. It collaborates with other government agencies related to tourism.

Tillväxtverket is based in Stockholm but has a regional structure. During the pandemic, the agency focused on activities related to COVID-19, supporting stakeholders with statistics, knowledge and activities, including financing for projects and business development. Visit Sweden's task was extended during the pandemic to include domestic marketing focusing on sustainable nature tourism.

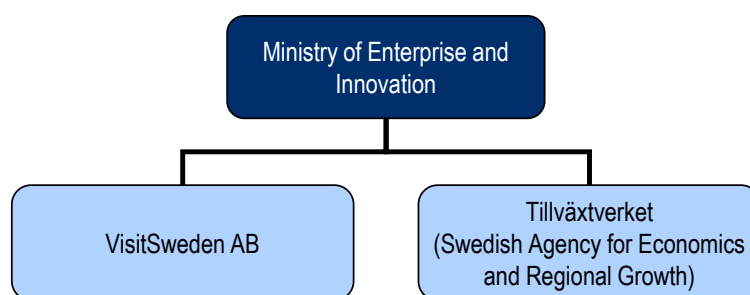
Sweden has set up a regional tourism network in regions which do not have a destination management organisation. The network is an important tool for communication and collaboration with industry organisations and national stakeholders. Recently, the work has been developed to include knowledge development activities within a few prioritised areas. The Swedish Association of Local Authorities and Regions (SALAR) is an umbrella organisation for local and regional authorities. An increasing number of

municipalities, county councils and regions work actively to support tourism. SALAR offers them support and services through networking platforms, knowledge reports, and conferences, among other activities.

The Council for the Promotion of Sweden works on promoting Sweden abroad. Council members are comprised of the Ministry for Foreign Affairs, the Ministry of Enterprise and Innovation, the Ministry of Culture, the Swedish Institute, Business Sweden and Visit Sweden. Sweden is also part of the Nordic tourism collaboration under the auspices of The Nordic Council of Ministers, which is in a phase of active policy, strategy, and implementation work.

In 2021, Tillväxtverket's budget allocation for tourism was approximately SEK 100 million. The 2022 budget is on the same level. Visit Sweden's budget allocation is SEK 105 million per year, with an additional SEK 20 million in 2021 for domestic marketing. There are also relatively large resources for tourism projects allocated through regional and EU funds.

Sweden: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Enterprise and Innovation, 2022.

Tourism policies and programmes

Work on developing a ten-year National Tourism Strategy, and the strategies for sustainable tourism and a growing tourism industry, has included co-operation between the Ministries of Enterprise and Innovation, Environment, Infrastructure, Culture, Education, Labour, Foreign Affairs and Finance, and co-operation with industry stakeholders.

The Strategy, launched in 2021, is based upon a national tourism policy review from 2017 and the results of extensive consultation open to all stakeholders. It covers the following strategic areas: easier entrepreneurship, jobs and skills, knowledge and innovation, accessibility, and marketing and communication. The strategy also includes horizontal perspectives of sustainability, digitalisation, place-based development and collaboration.

The multi-policy area approach is key in the Strategy, and there is a strong focus on sustainable development. The Strategy supports the national tourism policy goal: to have sustainable tourism, with a sustainable and competitive tourism sector that grows and contributes to employment and attractive locations for visitors, residents, companies and investments nationwide.

The Strategy sums up the desired situation for Swedish tourism in ten years' time in each of the above-listed areas. It is also designed to support Agenda 2030, the UN's Sustainable Development Goals, and climate policy objectives. Since the tourism industry comprises several different sectors and is so closely connected to many different public and non-profit stakeholders, a transformation into a competitive, fossil-free, and circular economy needs to involve a broad range of actors within different policy areas and in different parts of the system.

Sweden also developed a methodology for tourism development of UNESCO World Heritage Sites, which resulted in a manual for sustainable tourism development in World Heritages and cultural environments published in 2021 (see box below).

Several areas in the strategy have arisen as a high priority by the sector in the aftermath of the COVID-19 pandemic. One is skills and the supply of competencies. There is an increasing challenge in finding staff, particularly in the hospitality sector. Another area is transportation and accessibility, which is a challenge not least due to Sweden's geographical location and the fact that many tourist resorts are located in rural areas, but also given the green transition of the transport sector.

To strengthen its long-term focus, Tillväxtverket is developing a five-year strategic plan anchored in the national strategy and other steering documents, which includes initiatives for enterprises and direct business support.

The strategic plan also includes developing long-term national knowledge support for the tourism sector, such as a digital knowledge bank; quality assurance and delivery of statistics and analysis; follow-up of the pandemic's short- and long-term effects; and advanced knowledge on sustainable tourism. Place-based development is another element, focusing on synergies between policy areas and different parts of the local planning system.

Tourism development guidelines for UNESCO World Heritage sites in Sweden

In 2018, an initiative was taken in collaboration between Swedish national agencies related to tourism to develop a methodology for developing UNESCO World Heritage Sites in Sweden and the Nordics. The initiative was built upon earlier work using UNESCO's guidelines for World Heritage Site development and implemented as a pilot project in the World Heritage Site of Falun. The main partners were the Swedish National Heritage Board, the Swedish Agency for Economic and Regional Growth and the Region of Dalarna.

The project, running from 2019-21, included two parallel processes: one aiming at adapting the UNESCO site development guidelines to Nordic conditions, and one focused on the hands-on development of the site of Falun, testing the methodology in practice. Falun is located on the site of a former copper mine which was operative for around a millennium and is an important part of the Swedish cultural heritage. As a result of the project, a manual for sustainable tourism development in World Heritages and cultural environments was published in 2021.

The work and manual are now being implemented in many of Sweden's World Heritage Sites and UNESCO Biosphere Reserves, where projects are co-funded by the Swedish Agency for Economic and Regional Growth. This is part of a broader initiative on sustainable site development running from 2022-23.

Statistical Profile

Sweden: Domestic, inbound and outbound tourism


	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism¹					
Total domestic trips	54 216	55 880	56 171	128 792 |	122 669
Overnight visitors (tourists)	37 316	35 686	36 891	49 831 |	51 185
Same-day visitors (excursionists)	16 900	20 194	19 280	78 961 |	71 484
Nights in all types of accommodation	47 017	47 852	49 849	38 122	46 946
Hotels and similar establishments	31 916	33 075	34 712	23 135	29 742
Other collective establishments	15 101	14 777	15 137	14 988	17 204
Private accommodation	..	..	..	..	..
Inbound tourism²					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)
Same-day visitors (excursionists)
Top markets					
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Nights in all types of accommodation	16 191	17 327	17 522	5 180	7 274
Hotels and similar establishments	11 000	11 720	11 716	3 851	4 846
Other collective establishments	5 191	5 608	5 806	1 329	2 428
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	22 121	19 939	19 061	6 081 |	7 615
Overnight visitors (tourists)	20 361	18 855	18 000	4 225 |	5 767
Same-day visitors (excursionists)	1 760	1 084	1 061	1 856	1 848
Top destinations					
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TOURISM RECEIPTS AND EXPENDITURE, MILLION SEK					
Inbound tourism					
Total international receipts	139 226	102 581	104 222	44 966	..
International travel receipts	120 587	87 027	86 948	40 276	..
International passenger transport receipts	18 639	15 554	17 274	4 690	..
Outbound tourism					
Total international expenditure	165 911	159 621	162 002	62 579	..
International travel expenditure	145 184	136 477	135 876	56 847	..
International passenger transport expenditure	20 727	23 144	26 125	5 732	..

.. Not available; | Break in series

1. Trips from demand side surveys; Nights from supply side surveys.

2. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/rwe7v8>


Sweden: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	113 082	116 286	116 278	97 650	94 303
Tourism industries	..	70 953	73 590	73 076	65 183	61 882
Accommodation services for visitors	..	29 076	30 592	28 987	23 657	25 201
Hotels and similar establishments	2 160	..	..	..	..	..
Food and beverage serving industry	..	17 767	18 411	17 809	15 003	15 489
Passenger transport	..	11 576	12 400	12 894	13 123	8 932
Air passenger transport	..	4 217	4 341	4 719	7 594	3 757
Railways passenger transport	..	2 487	2 779	1 958	2 101	2 169
Road passenger transport	..	3 273	3 486	3 491	2 720	2 273
Water passenger transport	..	1 599	1 794	2 726	708	733
Passenger transport supporting services	..	0	0	0	0	0
Transport equipment rental	..	727	818	987	1 013	924
Travel agencies and other reservation services industry	..	7 273	6 922	7 796	7 625	7 058
Cultural industry	..	2 380	2 439	2 508	2 891	2 550
Sports and recreation industry	..	2 154	2 008	2 095	1 871	1 728
Retail trade of country-specific tourism characteristic goods	..	0	0	0	0	0
Other country-specific tourism industries	..	0	0	0	0	0
Other industries	..	42 129	42 696	43 202	32 467	32 421

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/mivzqn>

Sweden: Internal tourism consumption

Million SEK

	2021		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	191 746	57 093	248 838
Tourism characteristic products	131 005	27 108	158 113
Accommodation services for visitors	56 511	7 819	64 330
Food and beverage serving services	20 567	6 630	27 197
Passenger transport services	24 534	7 788	32 322
Air passenger transport services	9 173	3 770	12 943
Railways passenger transport services	1 800	779	2 579
Road passenger transport services	11 648	1 292	12 940
Water passenger transport services	1 912	1 947	3 859
Passenger transport supporting services	..	..	..
Transport equipment rental services	5 649	1 840	7 489
Travel agencies and other reservation services industry	10 564	1 331	11 895
Cultural services	10 188	519	10 707
Sports and recreation services	2 992	1 181	4 173
Country-specific tourism characteristic goods	0	0	0
Country-specific tourism characteristic services	0	0	0
Other consumption products	60 740	29 985	90 725
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/6vctou>



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