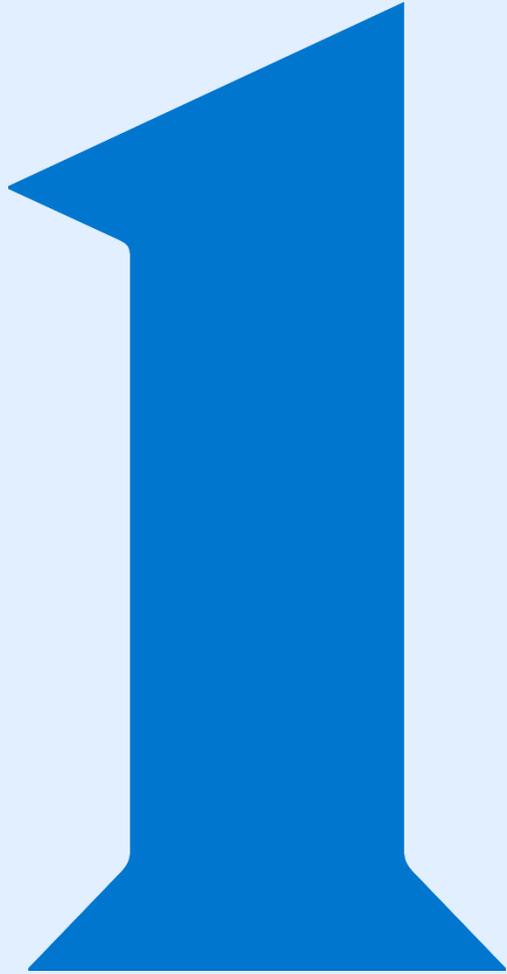




How to use TSA data for tourism policies?

SWEDEN



► **Swedish Agency for Economic and Regional Growth**

Who we are
and what we do



Swedish Agency for Economic and Regional Growth

Who we are and what we do

- ▶ The Swedish Agency for Economic and Regional Growth, is a government agency under the Ministry of Enterprise and Innovation
- ▶ We work to strengthen the competitiveness of Swedish companies by facilitating entrepreneurship and creating attractive environments for companies in the regions
- ▶ Some efforts are targeted directly to businesses or aspiring entrepreneurs
- ▶ Other initiatives are aimed at developing the general terms and conditions that affect the entrepreneurship



Swedish Agency for Economic and Regional Growth

Assignments within the tourism sector

- ▶ Knowledge and quality development as well as co-operation and coordination within the tourism sector
- ▶ Targeted assignments, for example:
 - » Sustainable destination development 2012-2015
 - » Sustainable product development 2016-2019
- ▶ EU-regulated and official statistics:
 - » Accommodation statistics
 - » “Swedish Tourism Survey”
- ▶ Tourism Satellite Accounts
 - » The National Accounts at Statistics Sweden produces and compiles the TSA-data
 - » The Swedish Agency for Economic and Regional Growth analyses and communicates the data



► **Tourism in Sweden**

Main results from the 2016
**Tourism Satellite Accounts in
Sweden**

Tourism in Sweden 2016

Total tourism consumption

Trend in total tourism consumption in Sweden (SEK billion).



Current prices

2015: + 6.6 per cent

2000: + 97.2 per cent

2000 prices

2015: + 5.5 per cent

2000: + 62.5 per cent

- ▶ Total tourism consumption in Sweden increased by 6.6 per cent at current prices in 2016 compared to previous year, totalling SEK 296 billion (EUR 30 billion).
- ▶ In relation to Sweden's total GDP this equals 2.7 per cent
- ▶ Since 2000, total tourism consumption in Sweden has increased by a total of 97 per cent at current prices, equivalent to an average annual increase of 4.3 per cent



Tourism in Sweden 2016

Exports & employment

- Foreign tourism consumption in Sweden increased by 12.7 per cent at current prices compared to previous year and totalled SEK 119.6 billion in 2016. (EUR 12 billion)
- Tourism's proportion of Sweden's total exports has increased from 3.9 per cent in 2000 to 6.2 per cent in 2016.
- The number of people employed in tourism increased by 6.9 per cent in 2016 compared with total employment in Sweden, which increased by 1.7 per cent.



▶ **How to use TSA data
for tourism policies?**

How to use TSA data for tourism policies?

“Tourism in Sweden”

- The report *“Tourism in Sweden”* is presented in mid June every year. It is considered of great importance as a common description of the development of tourism in Sweden.
- It mainly focuses on the TSA data but also includes accommodations statistics, results from the Swedish Travel Survey and other surveys and statistics covering the tourism sector.
- It is used by basically all organisations in the Swedish tourism system to understand, follow and communicate trends on a national level.
- Policy makers stress the importance of the regularity of the data which provide a good reference point and is important for decision making within the tourism sector.



How to use TSA data for tourism policies?

“Tourism in Sweden”

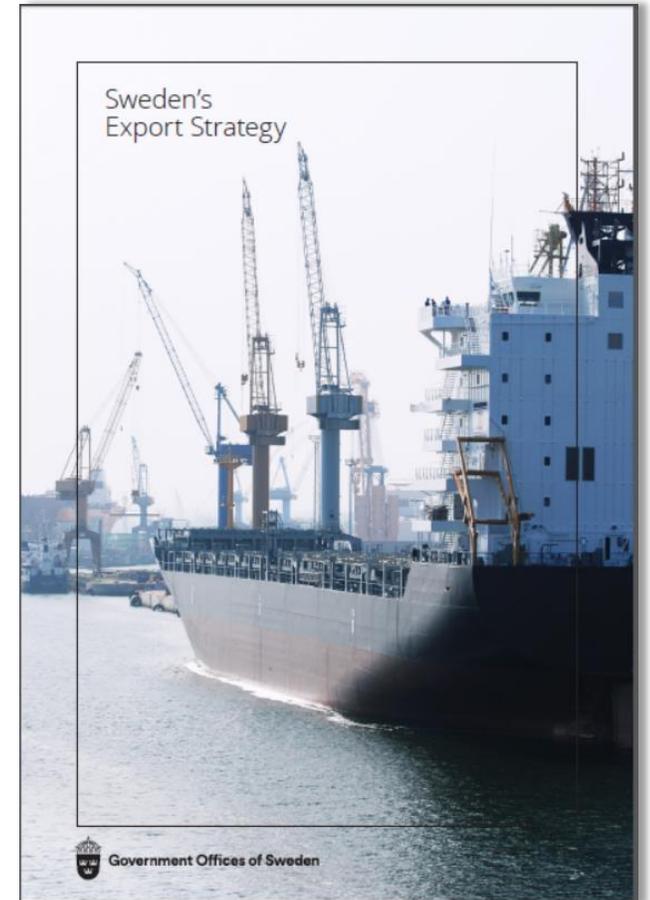
- ▶ In 2017 the Swedish Minister for Enterprise and Innovation attended the presentation of the TSA-results and took the opportunity to communicate the Swedish governments current work and priorities within the tourism sector.
- ▶ Swedish tourism sector is important for:
 - » Promoting economic development
 - » Creating jobs throughout Sweden
 - » Promoting innovation - as the sector grows, it forces companies to move up the value chain
- ▶ The Swedish government has initiated an official report of the Swedish tourism industry with the main purpose to provide government support for strengthening the tourism industry as an export and job engine across the country. Results will be presented on 4 December



How to use TSA data for tourism policies?

Sweden's export strategy

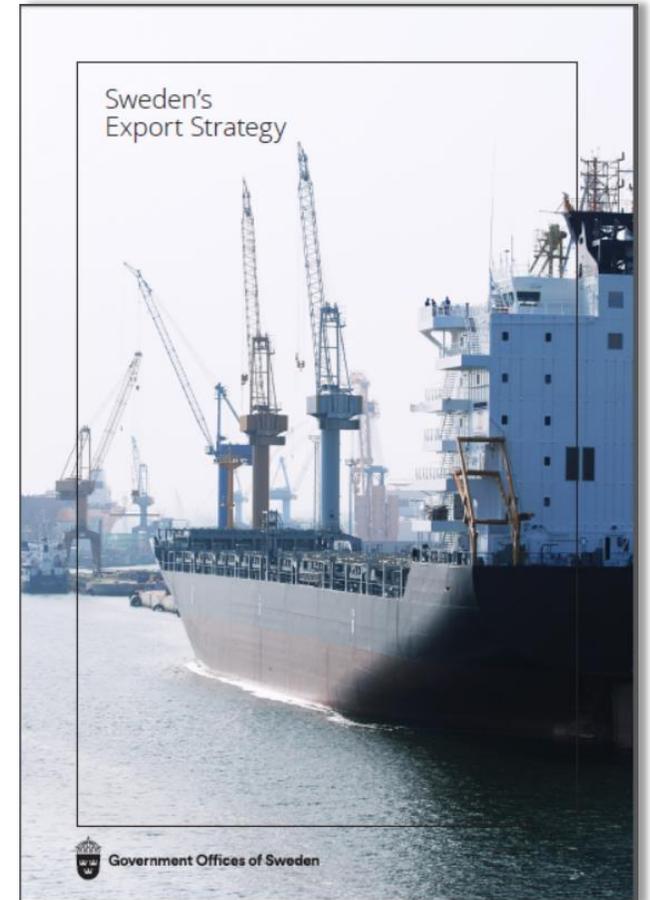
- ▶ For the first time the Swedish tourism industry is included in Sweden's export strategy, (launched in September 2015)
- ▶ The Swedish export strategy is to help achieve the Government's overall objective of Sweden having the lowest unemployment rate in the EU by 2020. The goals in the strategy are to:
 - » Increase exports, both in absolute figures and as a proportion of GDP
 - » Increase the proportion of exporting enterprises; and Increase Swedish enterprises' participation in the global economy.
 - » Increase Sweden's attractiveness for investments, expertise and **Tourists**
- ▶ In order to take advantage of the **growth** and **employment potential** of the tourism industry, it is key that there are continued initiatives to develop destinations, collaboration and initiatives abroad to market Sweden as a destination.



How to use TSA data for tourism policies?

Sweden's export strategy

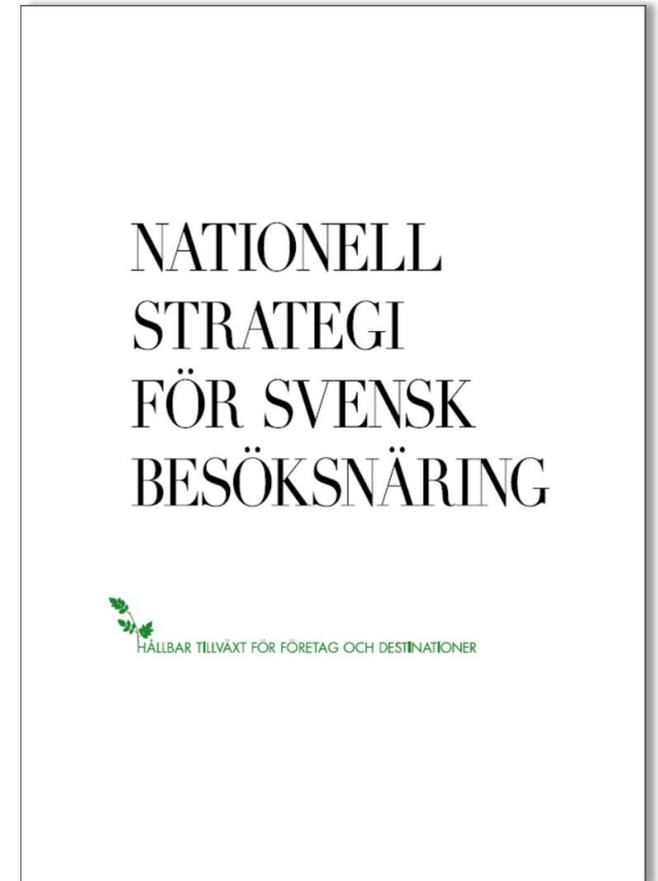
- ▶ VisitSweden is provided with additional resources in order to market Sweden as a tourist destination and get more tourists to come to Sweden.
- ▶ VisitSweden will be implementing specific initiatives to reinforce its presence in emerging markets such as India and China, to profile rural Sweden as a destination for ecotourism and nature tourism
- ▶ The Swedish Agency for Economic and Regional Growth's initiatives to create additional export-ready destinations will be supplemented with a specific focus on initiatives that support the development of new sustainable products and experiences that can contribute to more visitors and growing enterprises.



How to use TSA data for tourism policies?

The industry's strategy

- ▶ In 2010 the Swedish tourism industry launched a National Strategy for sustainable growth for businesses and destinations in Sweden.
- ▶ The strategy (revised in 2015) sets a target, based on the TSA data for Sweden 2010, that aims for a doubled tourism consumption by the year of 2020 where the number of employees in the tourism sector has increased to 242,000 and the export value has increased to SEK 150 billion.
- ▶ Today, almost all regions in Sweden (21 counties), have developed its own regional tourism strategy that aims for the same target, a doubled tourism consumption by the year 2020.



How to use TSA data for tourism policies?

Example County of Dalarna

- ▶ The tourism industry is today one of Dalarna's most important industries. Dalarna also occupies a strong fourth place among Sweden's tourism regions with a turnover of SEK 7.5 billion and with the target of reaching 10 billion by 2020.
- ▶ The County of Dalarna is now launching a new revised strategy "*Strategy 2030*" in autumn 2017. In the revised strategy the aim is still to achieve the turnover goal with only a slight shift in time. Strong focus on international visitors.
- ▶ Dalarna has worked extensively on collecting and producing regional data, including inventing all tourism companies in Dalarna in order to ensure the measurability of the set goals



Thank you for listening!

Sofi Sjöberg

Swedish Agency for Economic and Regional Growth

