

# **Mapping and performance check of the supply side of tourism education and training**

Report for Country Sweden

June 2015

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## 1.0 Tourism in Sweden

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### 1.1 The tourism sector in Sweden

The tourism sector in Sweden is growing, both in terms of size as well as in terms of increased national policy interest in the sector, however it is still comparatively small. In 2012 the sector made up 2.9% of Sweden's GDP, contributing SEK264bn (EU28.5bn) to the country's economy.<sup>1</sup>

But tourism is gaining ground in Sweden. Sweden is not a traditional tourist destination, yet total tourism turnover in Sweden has increased by more than 83% between 2000 and 2014 (based on current prices).<sup>2</sup>

During this time, the nature of visits has also changed. More visitors are travelling to Sweden for leisure rather than business. Statistics from 2013<sup>3</sup> suggest that Sweden hosted 18.8m million foreign visitors that year. Mostly visits were made for leisure (82%). Around 18% of visits were business-related. These figures imply that, compared to 2000, holiday visits have increased from 65% to 82%, while business related stays have decreased from 35% to 18%.<sup>4</sup>

The main tourist-related activities cover:

- Winter Sports
- Business Tourism
- Ecotourism
- Natural Tourism
- Cultural and historical tourism
- Cruising

The main countries visiting Sweden are the neighbouring Nordic countries (Denmark, Finland and Norway), along with Germany and the UK.

On average, foreign visitors spent SEK921 (EUR99.5) per person and per day, totalling SEK105.7bn's (EUR11.4bn) worth of foreign consumption in 2013. This is a substantial increase of 87.1% since 2005. Proportionally, tourism expenditure is spent on transport (SEK89bn), followed by accommodation and restaurants (SEK84bn), and Retail, including shopping and food, (SEK77bn).<sup>5</sup>

The Swedish Strategy adopted to promote tourism up to 2020 acknowledges that Sweden has great potential to continue to grow the sector (both in turns over turnover and in terms of employment). Yet there is a need for more high-quality national destinations with potential to attract foreign visitors.<sup>6</sup> The strategy puts a big emphasis on developing destination management in Sweden.

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<sup>1</sup> European Commission (2014) Tourism industry sub-sectors. COUNTRY REPORT: SWEDEN

<sup>2</sup> Ibid.

<sup>3</sup> The Swedish Agency for Economic and Regional Growth (2014) Fakta om svensk turism 2013

<sup>4</sup> The Swedish Agency for Economic and Regional Growth (2014) Fakta om svensk turism 2013 and European Commission (2014) Tourism industry sub-sectors. COUNTRY REPORT: SWEDEN

<sup>5</sup> European Commission (2014) Tourism industry sub-sectors. COUNTRY REPORT: SWEDEN

<sup>6</sup> Svensk Turism AB (2010) Nationell Strategi För Svensk Besöksnäring

**Table 1.1 SWOT Analysis of tourism in Sweden**

<b>SWOT ANALYSIS</b>	
<p style="text-align: center;"><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• The tourist industry has seen considerable real growth in the last decade and a half</li> <li>• Unique/exotic destinations</li> <li>• The country offers both winter and summer seasons</li> </ul>	<p style="text-align: center;"><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• The Swedish tourism sector is young and knowhow is still developing</li> <li>• The sector is characterised by low productivity</li> <li>• There appears to be a lack of political will to invest in the sector, at least at national level, which is contributing to challenges in finance and education and training</li> <li>• Lack of effective lobbying organisation as the sector is fragmented</li> </ul>
<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• Opportunities to develop niche markets in particular in eco-tourism and natural tourism</li> <li>• Svensk Turism AB and sectoral stakeholders have developed an ambitious strategy leading up to 2020</li> <li>• Strong regional interest and political will to invest in tourism</li> </ul>	<p style="text-align: center;"><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• International competition</li> <li>• Sweden has a less competitive taxation (high VAT)</li> </ul>

## 1.2 Tourism employment and skills

In terms of education, research and innovation potential, the Swedish tourism Strategy is positive about the quality of the education opportunities available within the tourism disciplines and the coordination between education providers. There is also good collaboration between tourism employers and trade unions, which helps to secure tourism as an attractive employment sector. On the other hand, the strategy acknowledges that the industry need to be clearer in articulating what are the needs in terms of skills and competence that the tourism sector will need for future growth and development.<sup>7</sup>

Reflecting the increase in visits, tourist-related employment has increased by 32% between 2000 and 2013, while in the same period total employment has grown by 9%. The latest available statistics (2013) indicate that 173,000 people work in the tourist sector.<sup>8</sup> Broken down into sectors this shows that:

- the hotel and restaurant sector employs around 81,100 staff

<sup>7</sup> Ibid.

<sup>8</sup> The Swedish Agency for Economic and Regional Growth (2014) Fakta om svensk turism 2013

- The retail sector employs 35,500 staff
- The transport sector employs 20,800 staff
- The culture and recreation sector 19,100 staff
- Travelling agencies and travel organisers employ 12,700 staff

The Swedish tourist labour market is largely labour intensive; when the tourist sector expands, this leads directly to new employment opportunities. However jobs tend to be low-paid opportunities largely filled by young people and other labour groups with lower educational attainment. Often a job in tourism is the entry into the labour market. The Swedish tourist labour market is characterised by low productivity.<sup>9</sup>

Like in other countries, the Swedish tourism industry is made up of heterogeneous sectors, which may or may not be defined for the purpose of collecting data and statistics. The largest sectors are the hotel and restaurant sectors, followed by other types of accommodation, transport, shopping, culture, sports and recreation.

Small and Medium sized Enterprises (SMEs) dominate the industry, although the hotel sector includes a number of large international businesses. Another key characteristic is that tourism businesses are not purely competitors but often complement each other throughout the supply chain – i.e. a tourist’s experience is put together by a range of products and services.<sup>10</sup>

**Table 1.2 Largest tourist sectors (employment) in Sweden 2013**

Sector	Number of employed	Percentage of total labour force (private sector)
Hotel and Restaurant	81,100	2.49
Retail	35,500	1
Culture and recreation	19,100	0.5
Tourist agencies	12,700	0.39
Transport (all)	19,700	0.6
Other tourist related services	3,800	0.1
Rental businesses	1,100	0.03

Source: The Swedish Agency for Economic and Regional Growth/Statistics Sweden

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<sup>9</sup> Svensk Turism AB (2010) Nationell Strategi För Svensk Besöksnäring

<sup>10</sup> Ibid.

## 2.0 The tourism education and training system

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### 2.1 Overview of the national education and training system

**This section will be provided by CSES.** It will provide a short summary of the characteristics of the national education and training system in general, such as:

- Rates of early school leaving
- Nature/strength of initial Vocational Education and Training system
- Nature/extent of different routes through the post-16 education system
- Tracking of students through compulsory/post-compulsory education
- Balance between planned provision versus markets, competition and choice
- Nature/extent of in-work/on-the-job training
- Strength/nature of lifelong learning culture
- Rates of participation by adults in lifelong learning
- Tradition/extent of free adult education
- Degree of flexibility in the education and training system
- Nature/extent of link between education/training & active labour market policies

### 2.2 Planning of tourism education and training

The **Swedish municipalities (NUTS 3 level)** and the public (state) education system set up are the principal organisers in the school system. They allocate resources and organise activities set to attain the national goals. The planning of tourism education and training is largely done by the municipalities and regions in Sweden and by tourism education and training providers. Therefore much of the vocational and higher educational supply of tourism vary across the country and according to each region's industrial and employment priorities. However, high school level (gymnasieskolan) education is organised through a national curriculum.

At a national level, the **Swedish Parliament and Government** set out the overarching education (schools and adult education) goals and guidelines through i.a. the Education Act and the Curricula. These are implemented by the **Swedish National Agency for Education**. The Agency supervises, supports, follows up and evaluates the school in order to improve quality and outcomes.

The Swedish National Agency for Education is also responsible for evaluating schooling to identify and highlight those areas where national development is needed. The Agency works to support schools in their development. The support to be given should be nationally prioritised. This may involve general development initiatives, which are justified on the grounds of shortcomings and problems that have been identified by means of different national and international studies, such as in mathematics, languages, and reading and writing skills. Competence development is also part of the Agency's work. It is responsible for the National School Leadership Training Programme and the initiative for professional supplementary training of preschool teachers and teachers.

At the higher education level, the **Swedish Higher Education Authority** is legally responsible for overseeing the university and university college system. Like the Swedish National Agency for Education, the Authority is a government agency which operates through Government instructions. The Authority monitors efficiency of the system, follow-up and 'horizon scan' for future needs.

The Authority is responsible for evaluating the quality all the programmes offered by higher education institutions. This includes all programmes that lead to the award of a general or professional qualification as well as third-cycle programmes. This work also includes the review of the degree-awarding powers of the higher education institutions. The Authority also appraises applications for entitlement to award qualifications by assessing whether or not programmes meet the quality requirements.

The **Swedish National Agency for Higher Vocational Education** is responsible for all matters concerning Higher Vocational Education (HVE) in Sweden. The Agency analyses labour market demands for qualified workforce, decide which vocational programmes are to be provided as HVE and allocate public funding to education providers. It also monitors and audit education quality and outcome.

Outside of the public system of planning, implementation and quality control, a key organisation for planning of tourism education and training is **Sveriges Turismutbildningar (STU)** (Swedish Tourist Educations). STU is a national members organisation and which encompasses the providers of around 150 tourist educations at high school (gymnasium), independent adult education college (folkhögskola), polytechnic (yrkeshögskola), and university levels. STU predominantly uses a soft approach to influence the sector. The body organises activities to increase the competence among teachers. This includes organising networking events and exchange of good practice<sup>11</sup>. STU has an on-going dialogue with Svensk Turism AB and is also a referral body to the Government on tourism matters.

### 2.3 Role of tourism employers and other stakeholders

Although there are several national organisations tasked to support Swedish tourism, in practice the implementation of Swedish tourism strategy is largely done at regional (NUTS 2+3) level. In the past in Sweden educational initiatives in tourism were organised largely as and when tourism employers initiated them. Today, regional (authority) involvement is much greater. There are for example regional competences platforms that are tasked with analyse tourism education demand and supply within the regional labour market (excluding high school level).<sup>12</sup>

Several regions (along with the three largest cities Stockholm, Göteborg and Malmö) have included the tourism industry in their regional development strategies. This includes Övre Norrland (in the north of the country) and Norra Mellansverige (in western Sweden). Regional authorities work with businesses and universities, using the Structural Funds and other instruments, to develop competences and networking relating to tourism in general, but also to further capacity in e.g. sports or eco-tourism.

In Dalarna (part of the Norra Mellansverige region) tourism educational providers and industry has formed *Besöksnäringsskolan* (College of the Hospitality Industry) which works to gear the educational curriculum towards the most pressing needs of the tourism industry.<sup>13</sup>

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<sup>11</sup> The latter is particularly important as sometimes there is only one single tourism teacher in the schools so they need the opportunity to benchmark.

<sup>12</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>13</sup> <http://www.bncollege.se>

Southern Sweden (Skåne) is also working strategically to develop the region's tourism industry. The region<sup>14</sup> has established *Business Region Skåne*, which is an umbrella marketing group that works to promote the region for investments, tourism, events and film. As part of this group there is a dedicated *Event in Skåne* body that focuses on marketing Skåne as a leading region for events. As part of this, Event in Skåne also help to create networks between organisers and suppliers in commerce and authorities, conducts studies and analyses into existing and new events, and works to support the development of existing events and to facilitate matters for entrepreneurs and to contribute to the development of products and destinations.<sup>15</sup>

On a national level, there are three<sup>16</sup> organisations whose remit (directly or indirectly) incorporates tourism education and training.

**Svensk Turism AB** (*Swedish Tourism Ltd*) is an umbrella organisation that is owed by around 170 businesses and organisations that represent a larger number (10,000s) of tourism enterprises. Svensk Turism AB is behind the National Strategy for Swedish Tourism 2020. It is a strategic body, which is concerned with related education and, but which also lobbies on broader issues concerning the industry.

With regards to the Swedish Strategy on Tourism, this recognises that one of the biggest challenges is to improve the efficiency, professionalism and profitability of the industry. The strategy wants to improve the sector's competence as a way of meeting this challenge.

With regards to education, the strategy points to a need to further develop the quality assurance and evaluation processes both with regards to high school level as well as vocational and university education. It points out that the Swedish tourist industry recruits personnel from a large number of educations and disciplines and there is a need to better understand the overall picture of supply and demand and what concrete needs the industry has. At the same time, the strategy advocates for improving the industry's standing in being an attractive employer.

To tackle these tasks, the strategy suggests two things:

1. Identifying future industry competency needs and initiating a dialogue between businesses and higher education providers with the aim of developing an action plan for the further development of competences.
2. Initiating basic as well as applied research and innovation programmes to increase the industry's understanding of itself, to facilitate innovation and entrepreneurial behaviour and to build networks and development opportunities.

With regards to employer's association, the Swedish tourism industry is organised through **Visita**. Visita is an umbrella organisation representing both an industry- and employers' organization. Its mission mainly pertains to economic policy issues in addition to industry and employer issues. Visita's activities span negotiating and

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<sup>14</sup> Business Region Skåne is owned by the regional council, Region Skåne (85 per cent), and the association of municipalities in Skåne (15 per cent).

<sup>15</sup> <http://www.eventinskane.com/en/our-mission-vision-and-strategy>

<sup>16</sup> An organisation which should be mentioned as being related to tourism, but not education and training in the field is VisitSweden. This is a communication and marketing company whose main task is to market the Swedish brand internationally and encourage tourism.



undersigning collective agreements for the sector, informing and educating member companies with advice in both employer and industry issues, monitoring and lobbying relevant legislation and regulations, conducting work on industry development. This includes for example organising hands-on courses in the hotel and restaurant business.

The **Swedish Agency for Economic and Regional Growth** administers the Foundation for knowledge promotion within tourism (Stiftelsen för kunskapsfrämjande inom turism). This is an independent foundation made up of industry and academic stakeholders who aim to support the furthering of knowledge within the industry. The Swedish Agency for Economic and Regional Growth, which is a national governmental agency, also oversees the production and development of information and knowledge about the development of tourism and the travel and tourism industry in Sweden are among its most important responsibilities. The Agency collects data (statistics published biannually) with the aim of:

- Providing companies and organisations in the tourism industry with relevant information and statistics
- Increasing the visibility of the travel and tourism industry by presenting it in economic terms in the same way as other industries.
- Bringing attention to the effects of the travel and tourism industry on the Swedish economy.

### 3.0 Main forms of provision

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The Swedish educational system offers fairly broad education and training opportunities. Historically, Sweden has been strong in offering (free) post-compulsory and adult education. The types of educational provisions that exist and that are relevant to this study are:

1. High school (gymnasium)
2. Independent adult education colleges (folkhögskolor)
3. Polytechnics (yrkeshögskola)
4. University and university colleges

The employment rate in Sweden for people with all levels of education is 83%, placing it joint first among OECD countries. Yet unemployment rates for people with all levels of education have increased between 2008 and 2011. The worsening labour market conditions are affecting the Swedish population differently, depending on their educational attainment.

According to the OECD, 38% of young people in Sweden will graduate from tertiary type A first-degree programmes, which is almost in line with the OECD average (39%).

Sweden has one of the lowest completion rates at tertiary level across the OECD. In 2011, only 53% of students graduated from the programme they entered, in comparison with the OECD average of 68%. This is partly explained as students in Sweden do not always need the graduation document to enter the labour market. The summary record of their completed courses is recognised as equivalent to a diploma for many types of education. Some 9% of 15-29 year-olds in Sweden are neither in employment, nor in education or training. This is one of the smallest percentages across OECD countries (where the OECD average is 16%).<sup>17</sup>

With regards to tourism in particular, there are few recent studies or analyses of tourism educational provisions. However, the Swedish Agency for Economic and Regional Growth commissioned a mapping of tourist educations in the country in 2012. This concludes amongst other things that the opportunities for Swedish students to move between education providers were not ideal (variations in intake and quality assurance leading to changes in courses costing time and money for students), despite work undertaken to implement the European Qualification Framework.<sup>18</sup>

The report also draws out some overarching trends compared to 2008, namely that:

- The number of tourism educations have decreased compared to 2008 from all types of providers, with the only exception of postgraduate courses, which have increased.
- High school students tend to choose higher educational programmes rather than vocational programmes if they continue their education.

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<sup>17</sup> OECD (2013) Education at a Glance: Sweden

<sup>18</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

- However, Higher Educational providers are increasingly offering vocational (2-year) courses.<sup>19</sup>

### 3.1 Higher education

The first tourism courses at higher education level in Sweden were established 1978; hence tourism is a young discipline. Its relatively recent establishment as a HE degree is an indication that Swedish academia and policymakers have traditionally not viewed tourism as job-creating activities with their own requirements for special skill, nor considered tourism as a national income.<sup>20</sup>

The establishment of a small number of tourism courses in Borlänge, Kalmar and Östersund was a direct result of a political decision in 1975 (by the then Government and Parliament) to i) establish a Tourism Council with the task of marketing Sweden as a tourist destination and a ii) to expand higher education with essentially a college in every county.<sup>21</sup>

According to the Swedish Council for Higher Education database, today there are around 90 different courses<sup>22</sup> available at HE level dedicated to tourism in some way. Prospective students can apply without having enrolled in or completed tourism studies at high school level.<sup>23</sup> Tourism courses at HE level have evolved somewhat (between 2008-2012) and have become more focused on vocational skills, which take two rather than three years to complete. Entrepreneurship teaching is included in most if not all courses.<sup>24</sup>

Of the courses and programmes available, around 14 are three-year programmes, six are Master (1-2 years) degrees and the majority (just under 70) are short-term modules to be chosen in tandem with other courses, i.e. a student can build up his/her own portfolio of specialisms. Almost half of the courses available are offered at a university located in the eastern part of Sweden (Norra Mellansverige). Umeå University (in the north) also offer a high number of courses (around 16) and universities in the south of Sweden offer around 10 courses.

In total, tourism courses are available at 11 different HE institutions, mostly from more recently established university colleges, although two traditional universities – Lund and Uppsala – also offer tourism studies.

Around two-thirds of the courses offered focus on a tourism specialism, most commonly Destination tourism, Economics, Management or Sustainability.

Unfortunately the Swedish Higher Education Authority's statistics on student numbers and degrees does not include data from which tourism studies numbers can be derived

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<sup>19</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>20</sup> Steene (2012) Tourism education in Sweden: Past, Present and Future. Strömstad Academy, Nordic Institute of Advanced Studies, Strömstad, Sweden.

<sup>21</sup> Steene (2012) Tourism education in Sweden: Past, Present and Future. Strömstad Academy, Nordic Institute of Advanced Studies, Strömstad, Sweden.

<sup>22</sup> Studera.nu

<sup>23</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>24</sup> Ibid.

(statistics is compiled from traditional disciplines, such as social sciences, humanities etc.).

The involvement of industry in HE provision tends to be regionally organised. Often larger employers have a say (or a seat) on university boards. In Dalarna (Norra Mellansverige) around 150 regional businesses has created Besöksnäringsskolan Dalarna, which is a member organisation that works to promote tourism in the region, often by requested skills training from the vocational education and training institutions.

The Swedish Higher Education Authority is responsible for Quality Assurance of HE courses. This QA process is laid down by the Government, which includes a qualification descriptor for each qualification awarded by the higher education institutions. The targets in the qualification descriptors, that apply for all courses and programmes are: i) Knowledge and understanding, ii) Competence and skills, iii) Judgement and approach. Courses and programmes if they have been established recently or are in the process of being phased out. The Swedish Higher Education Authority's evaluations are made by external expert panels that include subject experts, students and representatives of the labour market.<sup>25</sup>

At research level, there are at least two research institutes dedicated to tourism:

- The European Tourism Research Institute (ETOR) which conducts research, education and transfer of knowledge on tourism, in particular factors and processes with an impact on destination development.
- The R&D Fund of the Swedish Tourism & Hospitality Industry (BFUF), which works to promote scientific research and innovation within the hospitality sector.<sup>26</sup> BFUF has – in collaboration with the Swedish Innovation Agency VINNOVA, the universities of Mid Sweden, Umeå, Dalarna, Karlstad, Örebro, Uppsala, Göteborg, Lund, Linneaus, industry and industry organisations (Svensk Turism AB, Visita, Transportgruppen), the workers union (HRF), and the Swedish Agency for Economic and Regional Growth and Visit Sweden) – developed a Swedish Tourism and Hospitality Industry's Research and Innovation Agenda 2014-2030.

### **3.2 Vocational education and training**

Higher Vocational Education (HVE) programmes are provided through Yrkeshögskolor in Sweden. HVE courses are designed to respond to labour market need and programmes are developed in collaboration with employers and industry. HVE courses can be delivered by universities, local authorities or private training companies. Programme length varies, although most are between one and three years in duration.

All programmes are at a post-secondary level and tuition fee free. Prospective students can apply without having enrolled in or completed tourism studies at high

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<sup>25</sup> <http://english.uka.se/qualityassurance/thequalityofhighereducationprogrammes.4.4149f55713bbd91756380004975.html>

<sup>26</sup> <http://bfuf.se/about-us/>

school level.<sup>27</sup> Completion of a one-year minimum programme results in a Diploma in Higher Vocational Education. Completion of a two-year minimum programme results in an Advanced Diploma in Higher Vocational Education. HVE diplomas are not compatible with HE degrees as they operate using a different points system.

As a result of national changes to education policy the number of HVE courses have decreased in Sweden between 2008 and 2012 (from around 60 to 36, see Table 3.1), which have seen a considerable number of educational courses reclassified as high school programmes. Instead, HVE courses are now following curricula more closely aligned to EQF.

A recent mapping of the number of HVE courses available indicate the following number of courses available across the country, however the number of HVE courses available in 2015 are reportedly fewer in number:

**Table 3.1 HVE courses in Sweden 2012**

Focus on tourist education	Number of courses available
Gastronomy	13
Hotel, Reception and Conference	5
Swedish Tourist agency vocational (TRAC) education	5
Meeting and events	5
Ski instructor, Nature/Mountain/Adventure guide	4
Management	2
Sustainable tourism	1
Service Manager for Future Tourism	1
<b>Total</b>	<b>36</b>

*Source: Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet*

HVEs must reapply for support every two years.<sup>28</sup> The latest application round (i.e. applications by education providers to the Swedish National Agency for Higher Vocational Education to start a tourism course/programme) shows that in 2014 HVE providers applied for a total of 1,337 courses of which 979 were declined, i.e. just over a quarters (26% or 358) of courses were granted funding.

Normally, HVE programmes work with companies and organisations who are expected to take an active part in the planning as well as the implementation of the programmes. Employers and industry representatives take part as members of the programmes' steering committees. They may also take part through giving lectures, joining in projects or by offering work placements.

The Travel Education Centre (TEC) is one of the HVE education providers specialising in tourism programmes in Sweden. The Centre has been in operation since 1985. It provides foundational tourism education and training, tailor-made courses suited for individual employers, as well as niche tourism skills, e.g. sustainable tourism and security and risk programmes.<sup>29</sup>

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<sup>27</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>28</sup> Ibid.

<sup>29</sup> <http://tec.se/om-tec/>

In the county of Dalarna (in Norra Mellansverige) there are six organised groups of tourism businesses who collaborate with the HVE education system via Besöksnäring College Dalarna.<sup>30</sup> The business panels make requests to the HVE programmes for the types of skills sets and occupation groups they need. In this respect, the HVE system is quicker at adapting at regional needs compared to the universities.

In Dalarna (Norra Mellansverige) around 150 regional businesses has created Besöksnäringcollege Dalarna, which is a member organisation that works to promote tourism in the region (often by requested skills training from the vocational education and training institutions).

The Swedish National Agency for Higher Vocational Education has responsibility for all matters concerning Higher Vocational Education (HVE) in Sweden. The Agency is responsible for undertaking analysis of labour market needs for qualified workforce, decide which programmes are to be provided as HVE and allocate public funding to education providers. It also carries out follow-ups, evaluations and inspections.<sup>31</sup>

### **3.3 Adult education and training / lifelong training**

Sweden has over a century long history of adult education and training through Folkhögskolan (Folk High Schools). There are around 150 schools across the country. Officially they are separate from the Swedish education system as they are run by various popular movements, organisations, NGOs, and county councils or regions. The Folk High Schools are free to offer their own curricula and are not tied to any central government directives.

Despite its English translation ('High School'), the Folk High Schools actually offer post-High School learning. According to Folkhögskola data, there are seven different courses offered within the tourism domain. These are between 1-3 years in duration and offered by counties located in the North/western part of the country (Övre Norrland, Norra Mellansverige) or by regions in the south. Roughly half of the courses offer a broad tourism educational foundation, including entrepreneurship within the industry, while the other half focus on outdoor tour guiding.

The courses offer both theoretical and practical elements, including work experience opportunities. The syllabi suggest that there is a continued involvement of local industry in the teaching.

Folk High Schools are evaluated through the Swedish National Council of Adult Education, which also distributes public grants to the schools.

### **3.4 School education**

The upper secondary school (Gymnasieskolan) is a free and voluntary three-year education which builds on the nine-year schooling which is compulsory. The upper secondary school is a mixture of 18 programmes, which are either national programmes (covering nine traditional disciplines), introductory programmes that prepare pupils for occupations of further higher education studies, and individually

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<sup>30</sup> <http://www.bncollege.se/>

<sup>31</sup> <https://www.myh.se/In-English/Higher-Vocational-Education-Yrkeshogskolan/>

tailored programmes that differ from the national programme structure. A vocational programme can also be taken as an upper secondary apprenticeship education.

Gymnasieskolan offer a Hotel and Tourism Programme (which is one of the national programmes available) for students who wish to work in the tourism industry, hotels and conferences. There are two broad specialisations:

- Hotel and conference, focusing on developing service skills, care of customers, and how to organise, plan and carry out meetings and events. The orientation enables students to work in e.g. reception, booking, conferences or floor service.
- Tourism and travel: focus on education on tourist information, organisation and travel planning, activities and experiences, travel destinations and itineraries, and enhancing skills in service and customer care. The orientation enables students to work in e.g. activities and experiences, tourist information, guiding, or booking and sales.

There is a practical element of the programme. Phases of the education take place at one or several workplaces for a period of at least 15 weeks. The programme is designed to allow graduates to either enter the labour market after you finishing the programme, or continue their studies in vocational higher education. If students also choose to study additional courses they may be eligible for further studies in higher education.

According to the 2012 mapping report of tourism educations in Sweden, the Hotel and Tourism Programme is one of the nationally offered programmes that has seen the largest decrease in the number of student enrolling. One of the possible explanations for this decrease is that it is possible to enrol in vocational or higher education tourism degrees without having completed the high school programmes. Therefore, younger student may choose to specialise at a later stage.<sup>32</sup> The report flags up a different – possibly bigger – challenge, which is that a certain number of students will need to have applied and been accepted in order for a programme to start. This has an impact in smaller towns/less populated areas, notably Sälen/Malung and Åre, which are all key tourist destinations, but whose local population is too small to enable a high-school programme to start.<sup>33</sup>

As mentioned above, the Swedish National Agency for Education is responsible for evaluating schooling to identify and highlight those areas where national development is needed. Following national reforms and in order to increase input from industry, the Agency set up an advisory group in 2011. This consists of employers and includes VISITA and a number of the large hotel chains in Sweden.

### **3.5 Other work-based learning**

Although there are no central data on the existence of work-based learning providers, there are examples of large employers providing education and training to their existing staff. Scandic, which is a Nordic hotel chain with 14,000 staff, has established an internal 'Business School'. This offers commercial and leadership courses as well as

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<sup>32</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>33</sup> Ibid.

more practical training to improve capacity in specific roles within the firm, including service skills.<sup>34</sup>

As mentioned in section 2.3 the Swedish umbrella organisation for tourism industry employers, *Visita*, the Swedish tourism industry is organised through, coordinates training activities. These include the organisation of practical courses in the hotel and restaurant business, notably through the *VisitaAkademin*. This is an educational initiative taken by *Visita* along with the Swedish Camping Association and Swedish Ski Resorts Association (*Svenska Skidanläggningars Organisation*).

*VisitaAkademin* offers employer-led 1-10 day courses across 60 odd different themes. Mostly the courses relate to practical skills around tourism careers, but a handful of courses also focus on management, social media or quality assurance skills.<sup>35</sup>

Tour operators and travel agencies in Sweden organise their own sector-specific education and training through the Travel Academy AB (TRAC). TRAC is a HVE-education and the number of educational institutions (schools) may vary on yearly basis as they have to reapply for support every two years. TRAC also known as *Diplomerad resekonsult* is a trademark higher vocational educational programme owned by the travel industry and where the Association of Swedish Travel Agents and Tour Operators (SRF) is the majority owner. The TRAC education is a free two-year programme on post-secondary level.<sup>36</sup>

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<sup>34</sup> <http://www.scandichotels.com/settings/Side-foot/About-us-Container/Work-with-us/Training/>

<sup>35</sup> <http://www.visitaakademin.se/>

<sup>36</sup> [http://www.trac.se/in\\_english](http://www.trac.se/in_english)



## **4.0 Analysis of occupations**

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The tourism industry is growing in Sweden, however the industry and the educational system feeding it are still developing. As a result – and as illustrated by sections 4.1 to 4.9, the educational routes in to tourism occupations can generally be broad. One view is that this is the result of too few tourism education courses being available. Other factors may include a lack of direction from industry in terms of what skills they need.

It is recognised, also among tourism employers, that the industry is seen as an entry-level employment opportunity. Indeed, 30-40 years ago the industry was seen as a sector that employed young women who worked for a few years before settling down to marry.

But the industry has changed drastically from this traditional (and simplified) view. The national strategy for tourism has set ambitious goals in terms of growth – doubling the industry – and this is supported among stakeholders who are involved in the educational side of the industry too. However, there is equally an awareness that the tourism industry face compete with other sectors both for qualified staff and for public funding for setting up vocational programmes. A related challenge is for the (rather fragmented) tourism industry to work together to articulate the needs they have in terms of skills and qualifications.

### **4.1 Commercial managers**

The Swedish tourism strategy and stakeholder feedback alike emphasise the need to further develop the industry's business management skills in terms of entrepreneurial activities.

The Swedish vocational and higher education system does cater for commercial management skills particularly with regards to tourism, however these courses are not available nationwide (unless undertaken through distance learning). Mostly, courses offered are selected by students as individual modules, for example the 0.1 year long Tourism experiences and innovation from Mittuniversitetet (Norra Mellansverige region). In terms of dedicated programmes, there is also a three-year postgraduate degree in Service Management, Tourism Management offered by the University of Lund (Skåne).

These courses will have build on the foundation of general skills required (e.g. marketing, accounting), but the modules or courses also specialise in the tourism trade, and in particular new and pretty innovative aspects of the industry.

The relative small size of the industry in Sweden, coupled with the ambitious targets developed at national level for tourism indicate that there will be a continued need for commercial managers in the sector in the foreseeable future.

### **4.2 Accommodation management**

There are four three-year programmes offered by the Swedish vocational and higher education system, which specifically provide accommodation management skills. In addition, students can build up skills and qualifications through individual shorter models. Courses on offer focus on general hotel and service management skills. Umeå

University also offer a three-year tourism programme, focusing on destination and tourism management within the hotel sector.

The programmes offered tend to come from regions that have prioritised the tourism sector and as such the courses are fairly tailored to the specific regional needs. Umeå for example, has potential to develop the experience, sports, culture and environmental aspects of the industry.

As with the need for commercial managers, the relative small size of the industry in Sweden, coupled with the ambitious targets developed at national level for tourism indicate that there will be a continued need for accommodation managers.

### **4.3 Accommodation operatives**

There are a range of educational alternatives at high school level and vocational level that qualify students as accommodation operatives. Gymnasieskolan (high school) offer 44 programmes nationwide focusing on hotel and tourism skills.<sup>37</sup> As mentioned in section 3.5, a number of the larger employers and the VISITA organisation offer work-based training tailored according to regional and employer needs.

Although not technically within the remit of this study, a key issue that is currently being debated within the industry is the high level of industry demand for qualified staff within the restaurant and hotel sector. The response from education providers (polytechnics) has been to organise and submit applications for additional Higher Vocational Education courses to run to the Swedish National Agency for Higher Vocational Education. However, the Agency has prioritised other sectors in need of qualified staff such as health care and IT.

### **4.4 Management of meetings, incentives, conferences, and exhibitions**

Several regions (e.g. Skåne, Norra Mellansverige) actively promote the area as a destination for meetings, conferences and events. In these regions, public and private stakeholders have formed umbrella organisations to – among other things – support educational initiatives in the sub-sector.

The educational system itself (high school and vocational education) also provides a range of courses in conference and events management. This includes most if not all of the comprehensive tourism education programmes available. There are also smaller niche educational programmes offered through Folkhögskolan's courses.

### **4.5 Destination management**

Destination management is still a young sub-sector of the Swedish tourism industry, however it is increasingly gaining recognition. Destination management is a key priority of the Swedish Tourism Strategy, and which also emphasises the need to develop clusters of coordinated actors who collectively develop and define a destination.<sup>38</sup>

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<sup>37</sup> <http://www.gymnasium.se/sok/hotell-och-turismprogrammet-ht>

<sup>38</sup> Svensk Turism AB (2010) Nationell Strategi För Svensk Besöksnäring

On a practical level, destination management is largely driven by the Swedish regions who market themselves according to their natural and other resources and features and some of who employ destination developers. There are however still very few destination businesses (around 20-25 micro enterprises according to one source) and even if demand may increase in the longer-run, there is no immediate need for additional skills.

#### **4.6 Tour operators**

Tour operators and travel agencies (around 260 companies in total) in Sweden organise their own sector-specific education and training through the Travel Academy AB (TRAC or *Diplomerad resekonst*). This is a trademark higher vocational educational programme owned by the travel industry and where the Association of Swedish Travel Agents and Tour Operators (SRF) is the majority owner.

The education is a free two-year programme on post-secondary level, resulting in an Advanced Diploma in Higher Vocational Education and a TRAC-diploma as Travel Consultant. The course is offered in Gothenburg, Norrtälje, Skellefteå, Stockholm, Uddevalla and Uppsala.

Quality assurance is regulated by the Association's Board of Directors who approves each of the programme organisers. Education is tailored in collaboration with the travel industry and approximately one-third of the education consists of practical training and internship. According to the Association, the majority of the students are employed immediately after graduation.

TRAC/*Diplomerad resekonst* is well-established in the sector. Normally clients operating in the sector require educated travel consultants in order to sign an agreement with a travel agency.<sup>39</sup>

#### **4.7 Travel agencies**

See section 4.6 (TRAC education also covering travel agencies).

#### **4.8 Cultural, sports and recreational activities**

Tourism activities related to sports are probably the most well-developed in Sweden, however recreational activities like Spa resorts are also seeing a fairly strong development and increase in popularity. According to our interviews there is a shortage of competence needed for spa resorts (e.g. spa therapists). In Dalarna (part of the Norra Mellansverige region) a recent inventory identified the need for at least 40 spa therapists in the short term.<sup>40</sup>

In terms of sport, skiing and hiking are two major (seasonal) tourist attractions, which generally require vocational or higher educational qualifications. The employment

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<sup>39</sup> [http://www.trac.se/in\\_english](http://www.trac.se/in_english)

<sup>40</sup> Interview feedback

market is regional for these occupations, and the educational programmes are also focused on the regions where environmental tourism is dominating.

#### **4.9 Tourism education, research journalism and consulting**

Tourism education, research, journalism and consulting tend to require a higher education degree as these professions more generally (i.e. teaching, journalism, consulting) are quite competitive and well regulated professions. Sweden has high rates of participation in higher education – higher education intake is very competitive – however as tourism is a fairly young industry, competence is still somewhat limited. For example, in the educational institutions, there is often only one tourism specialist.<sup>41</sup>

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<sup>41</sup> Interview feedback

## 5.0 Skills & Competences

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### 5.1 Gaps in Provision

There are a number of gaps in provision of tourism related skills and competences in Sweden, although public and private stakeholders have taken a number of key steps in the last decade or so to strengthen the output of skilled labour. In the past, tourism educational programmes were initiated by industry itself, but today there are (albeit to a varying degree depending on the perceived importance of the tourism industry) regional platforms that oversee and analyse the supply and demand of skills and competences at vocational and higher education level.

Yet, most of the occupations reviewed in section 4 do suffer – to some extent – from gaps in provision. A fairly recent mapping exercise of tourism education courses conclude that in the last years (up to 2012) the number of tourism programmes has decreased in all areas of education with the only exception being postgraduate courses.<sup>42</sup> This decrease is partly explained by an apparent low quality (according to the monitoring agency) of Yrkeshögskolan's vocational programmes.<sup>43</sup>

In summary, the industry has a short-term and immediate need for hotel and restaurant competence. In particular qualified chefs, which appears a nationwide shortage. Regionally, further capacity and competence is needed to be able to pursue strategies to develop niche sectors, such as the (spa) weekend tourism concept.

In the medium- and longer-term, more strategic skills including commercial and destination management, and entrepreneurship will become increasingly important, in particular to match the very ambitious tourism strategy currently being implemented.

In terms of numbers of qualified students needed, the short-term needs coupled with the strategic aims (if achieved), means that in all likelihood the industry could use additional capacity in the 1000s.

One overarching issue is that the tourism industry in Sweden faces competition for public educational funds from other sectors (IT and health care are two examples). Of course, the industries also compete for skilled and competent labour.

The lack of educational opportunities is however recognised. In a 2012 report<sup>44</sup>, the the National Agency for Higher Vocational Education suggests increasing the supply through additional programmes and student places in some counties, both within tourism studies as well as within entrepreneurship more generally.

There is no evidence for suggesting that the educational programmes that do exist are other than high quality initiatives and which take into account the (changing) needs of industry. Having said this, individual representatives of the tourism industry have criticised the education system for, among other things, a lack of knowledge among teachers of the national strategy for tourism, a lack of inclusion of businesses and sales courses, and a perceived focus of the education system to supply 'employees'

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<sup>42</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>43</sup> Ibid.

<sup>44</sup> Swedish National Agency for Higher Vocational Education (2012) Regional efterfrågan och kompetens inom yrkeshögskolan

rather than 'entrepreneurs'.<sup>45</sup> Yet no systemic failures or shortcomings can be identified in the programmes offered.

A good illustration of the current gaps in provision is the situation in Dalarna (county in the Norra Mellansverige region), which is the fourth largest tourist destination in Sweden. The county has a great need of labour. There are at least 7,000 people employed within the tourism industry, which faces high levels of competition from other industries. The region has applied for vocational programmes (Yrkeshögskolor) in tourism – but these have had a low acceptance rate (perhaps one out of 10 applications), as other programmes tend to receive priority (IT, economics, engineering). The county recently undertook an inventory of its capacity for developing weekend tourism packages, which showed the county will need e.g. an additional 40 spa therapists in the short-term to cope with demand. However, this need will need to be tackled locally and/or by industry as the vocational programme applied for was not accepted by the National Agency for Higher Vocational Education.<sup>46</sup>

Although the county struggles to develop the skills and competences needed as the education field lacks a high policy profile, the tourism industry is seeing significant investments – SEK10 billion (EUR1.06bn) have been earmarked for investment with half already spent. This includes for example an additional 37,000 new hotel beds and a new airport in Sälen for charter flights. The county anticipates these investments will need an additional 2,200 jobs of which 500 will be needed for the airport and are not seasonal employment.

The broader context is that in the next decade one-third of Dalarna's work force will be retiring, while the number of students commencing a high-school programme is decreasing. Compared to other industries, the tourism sector, and the education system, is not well prepared for these changes.

## **5.2 Addressing new skills and competences requirements**

Although no comprehensive data on the extent of the gaps in provisions have been found, anecdotally it would seem there is a need for skilled labour in the 1000s.

The vocational and higher education systems (supported and advised by industry) are responsible for the supply of tourism programmes and thus responsible for addressing needs at national and regional levels.

Having said this, the interviews have also indicated that there is a lack of critical mass in the tourism industry in Sweden and a stronger and more engaged sector would also help to address the education and training challenges, and also help the sector's influence in general.

The Swedish Parliament has been active in reaching out to discuss the needs of industry, something that has not happened in the past. The Parliament has established a Tourism Committee.

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<sup>45</sup> Swedish National Agency for Higher Vocational Education (2012) Regional efterfrågan och kompetens inom yrkeshögskolan

<sup>46</sup> Interview feedback

There seems to be a general understanding that there is a need to develop and/or prioritise tourism education and training more generally, but that it takes time for the education system to adapt. This is not helped by the fragmentation of the tourist industry, which could also be clearer in articulating their needs and to support the education system with their inputs and offering teaching and apprenticeships. However as the sector is small it has become used to adapting to the labour it has been able to acquire.

## 6.0 Performance of the system<sup>47</sup>

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### 6.1 Learning outcomes

As discussed in the section(s) above, as a result of it being a relatively small industry facing competition from other sectors, tourism is facing a lack of supply of skilled staff.

There is an agreement that, although a lack of supply of students is often a regional challenge, the problem is equally a national one. The Swedish tourism industry is young and somewhat fragmented and could ideally be strengthened. At the same time, policymakers are increasingly acknowledging that the industry needs support, and it is believed that with time, the education system will respond.

In terms of the performance of the existing education system, anecdotal feedback and existing studies indicate that although more capacity is needed, the education system is largely delivering the necessary skills and competences required.

Education providers at all levels allow industry to participate through advisory committees and to actively contribute through work placements. Their participation help secure the content as well as the quality of the programmes on offer.

In terms of the dialogue in place between the education system and industry, there is room for improvement in coordinating activities linked to the national tourism strategy, however this is somewhat vague in terms of pinpointing to educational needs.

There is still scope however to further improve the profiles of the occupations available to progress into once students have graduated. Secondly, there also seems to have been a debate for some years now regarding the balance between practical and theoretical skills needed and how to accommodate for these within the education system. As a result, it seems as if the higher vocational and higher education system are becoming more similar in nature, with higher education programmes offering to focus more on occupational rather than theoretical skills.

### 6.2 Progression into/within employment

There is no evidence that there are any considerable issues relating to the progression into the industry. On the other hand, industry representatives consider there to be more of an image related issue in terms of progress *within* employment. Although the industry does offer young people a career, it is not widely recognised to do so. Rather, to an extent, tourism is seen as an entry level and/or temporary employment, and the industry seems to recognise that it is largely its responsibility to change this.

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<sup>47</sup> This section is largely based on the report from the Swedish National Agency for Higher Vocational Education (2012) Regional efterfrågan och kompetens inom yrkeshögskolan



## 7.0 Summary

<b>The Supply of Tourism Education &amp; Training</b>	
<b>Country</b>	Sweden
<b>Context</b>	
<p>The tourism sector in Sweden is growing, both in terms of size as well as in terms of increased national policy interest in the sector, however it is still comparatively small. In 2012 the sector made up 2.9% of Sweden's GDP, contributing SEK264bn (EU28.5bn) to the country's economy.<sup>48</sup></p> <p>But tourism is gaining ground in Sweden. Sweden is not a traditional tourist destination, yet total tourism turnover in Sweden has increased by more than 83% between 2000 and 2014 (based on current prices).<sup>49</sup></p>	
<b>Tourism employment and skills</b>	
<p>Tourist-related employment has increased by 32% between 2000 and 2013, while in the same period total employment has grown by 9%. The latest available statistics (2013) indicate that 173,000 people work in the tourist sector.<sup>50</sup> Broken down into sectors this shows that:</p> <ul style="list-style-type: none"> <li>• The hotel and restaurant sector employs around 81,100 staff</li> <li>• The retail sector employs 35,500 staff</li> <li>• The transport sector employs 20,800 staff</li> <li>• The culture and recreation sector 19,100 staff</li> <li>• Travelling agencies and travel organisers employ 12,700 staff</li> </ul> <p><b>The Swedish tourist labour market is largely labour intensive; when the tourist sector expands, this leads directly to new employment opportunities. However jobs tend to be low-paid opportunities largely filled by young people and other labour groups with lower educational attainment. Often a job in tourism is the entry into the labour market. The Swedish tourist labour market is characterised by low productivity.<sup>51</sup></b></p>	
<b>The tourism education and training system</b>	
<p>The Swedish educational system offers fairly broad education and training opportunities. Historically, Sweden has been strong in offering (free) post-compulsory and adult education. The types of educational provisions that exist and that are relevant to this study are:</p> <ol style="list-style-type: none"> <li>5. High school (gymnasium)</li> <li>6. Independent adult education colleges (folkhögskolor)</li> <li>7. Polytechnics (yrkeshögskola)</li> </ol>	

<sup>48</sup> European Commission (2014) Tourism industry sub-sectors. COUNTRY REPORT: SWEDEN

<sup>49</sup> European Commission (2014) Tourism industry sub-sectors. COUNTRY REPORT: SWEDEN

<sup>50</sup> The Swedish Agency for Economic and Regional Growth (2014) Fakta om svensk turism 2013

<sup>51</sup> Svensk Turism AB (2010) Nationell Strategi För Svensk Besöksnäring

## 8. University and university colleges

The employment rate in Sweden for people with all levels of education is 83%, placing it joint first among OECD countries. Yet unemployment rates for people with all levels of education have increased between 2008 and 2011. The worsening labour market conditions are affecting the Swedish population differently, depending on their educational attainment.

According to the OECD, 38% of young people in Sweden will graduate from tertiary type A first-degree programmes, which is almost in line with the OECD average (39%).

Sweden has one of the lowest completion rates at tertiary level across the OECD. In 2011, only 53% of students graduated from the programme they entered, in comparison with the OECD average of 68%. This is partly explained as students in Sweden do not always need the graduation document to enter the labour market. The summary record of their completed courses is recognised as equivalent to a diploma for many types of education. Some 9% of 15-29 year-olds in Sweden are neither in employment, nor in education or training. This is one of the smallest percentages across OECD countries (where the OECD average is 16%).<sup>52</sup>

With regards to tourism in particular, there are few recent studies or analyses of tourism educational provisions. However, the Swedish Agency for Economic and Regional Growth commissioned a mapping of tourist educations in the country in 2012. This concludes amongst other things **that the opportunities for Swedish students to move between education providers were not ideal** (variations in intake and quality assurance leading to changes in courses costing time and money for students), despite work undertaken to implement the European Qualification Framework.<sup>53</sup>

The report also draw out some overarching trends compared to 2008, namely that:

- The number of tourism education courses have decreased compared to 2008 from all types of providers, with the only exception of postgraduate courses, which have increased.
- High school students tend to choose higher educational programmes rather than vocational programmes if they continue their education.
- However, Higher Educational providers are increasingly offering vocational (2-year) courses.<sup>54</sup>

**There is an agreement that, although a lack of supply of students is often a regional challenge, the problem is equally a national one. The Swedish tourism industry is young and somewhat fragmented and could ideally be strengthened. At the same time, policymakers are increasingly acknowledging that the industry needs support, and it is believed that with time, the education system will respond.**

In terms of the performance of the existing education system, anecdotal feedback and existing studies indicate that although more capacity is needed, the education system

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<sup>52</sup> OECD (2013) Education at a Glance: Sweden

<sup>53</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>54</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

is largely delivering the necessary skills and competences required.

Education providers at all levels allow industry to participate through advisory committees and to actively contribute through work placements. Their participation help secure the content as well as the quality of the programmes on offer.

Although there are several national organisations tasked to support Swedish tourism, in practice the implementation of Swedish tourism strategy is largely done at regional (NUTS 2+3) level. In the past in Sweden educational initiatives in tourism were organised largely as and when tourism employers initiated them. Today, regional (authority) involvement is much greater. There are for example regional competence platforms that are tasked with analyse tourism education demand and supply within the regional labour market (excluding high school level).<sup>55</sup>

On a national level, there are three<sup>56</sup> organisations whose remit (directly or indirectly) incorporates tourism education and training.

**Svensk Turism AB** (*Swedish Tourism Ltd*) is an umbrella organisation that is owed by around 170 businesses and organisations that represent a larger number (10,000s) of tourism enterprises. Svensk Turism AB is behind the National Strategy for Swedish Tourism 2020. It is a strategic body, which is concerned with related education and, but which also lobbies on broader issues concerning the industry.

With regards to employer's association, the Swedish tourism industry is organised through **Visita**. Visita is an umbrella organisation representing both an industry- and employers' organisation. Its mission mainly pertains to economic policy issues in addition to industry and employer issues. Visita's activities span negotiating and undersigning collective agreements for the sector, informing and educating member companies with advice in both employer and industry issues, monitoring and lobbying relevant legislation and regulations, conducting work on industry development. This includes for example organising hands-on courses in the hotel and restaurant business.

The **Swedish Agency for Economic and Regional Growth** administers the Foundation for knowledge promotion within tourism (Stiftelsen för kunskapsfrämjande inom turism). This is an independent foundation made up of industry and academic stakeholders who aim to support the furthering of knowledge within the industry. The Swedish Agency for Economic and Regional Growth, which is a national governmental agency, also oversees the production and development of information and knowledge about the development of tourism and the travel and tourism industry in Sweden are among its most important responsibilities.

### **Analysis of occupations**

The tourism industry is growing in Sweden, however the industry and the educational system feeding it are still developing. As a result the educational routes in to tourism occupations can generally be broad. One view is that this is the result of too few tourism educations being available. Other factors may include a lack of direction from

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<sup>55</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>56</sup> An organisation which should be mentioned as being related to tourism, but not education and training in the field is VisitSweden. This is a communication and marketing company whose main task is to market the Swedish brand internationally and encourage tourism.

industry in terms of what skills they need.

### **Commercial managers**

The Swedish tourism strategy and stakeholder feedback alike emphasise the need to further develop the industry's business management and commercial skills in terms of entrepreneurial activities.

The Swedish vocational and higher education system does cater for commercial management skills particularly with regards to tourism, however these courses are not available nationwide (unless undertaken through distance learning). Mostly, courses offered are selected by students as individual modules. In terms of dedicated programmes, there is also a three-year postgraduate degree in Service Management, Tourism Management offered by the University of Lund (Skåne).

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The relative small size of the industry in Sweden, coupled with the ambitious targets developed at national level for tourism indicate that there will be a continued need for commercial managers in the sector in the foreseeable future.

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The programmes offered tend to come from regions that have prioritised the tourism sector and as such the courses are fairly tailored to the specific regional needs. Umeå for example, has potential to develop the experience, sports, culture and environmental aspects of the industry.

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<sup>57</sup> <http://www.gymnasium.se/sok/hotell-och-turismprogrammet-ht>

stakeholders have formed umbrella organisations to – among other things – support educational initiatives in the sub-sector. The educational system itself (high school and vocational education) also provides a range of courses in conference and events management. This includes most if not all of the comprehensive tourism education programmes available. There are also smaller niche educational programmes offered through Folkhögskolan's courses.

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In terms of sport, skiing and hiking are two major (seasonal) tourist attractions, which generally require vocational or higher educational qualifications. The employment market is regional for these occupations, and the educational programmes are also focused on the regions where environmental tourism is dominating.

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<sup>58</sup> Svensk Turism AB (2010) Nationell Strategi För Svensk Besöksnäring

<sup>59</sup> [http://www.trac.se/in\\_english](http://www.trac.se/in_english)

<sup>60</sup> Interview feedback

### **Tourism education, research journalism and consulting**

Tourism education, research, journalism and consulting tend to require a higher education degree as these professions more generally (i.e. teaching, journalism, consulting) are quite competitive and well regulated professions. Sweden has high rates of participation in higher education – higher education intake is very competitive – however as tourism is a fairly young industry, competence is still somewhat limited. For example, in the educational institutions, there is often only one tourism specialist.<sup>61</sup>

### **Analysis of gaps in skill & competences**

**There are a number of gaps in provision of tourism related skills and competences in Sweden, although public and private stakeholders have taken a number of key steps in the last decade or so to strengthen the output of skilled labour.** In the past, tourism educational programmes were initiated by industry itself, but today there are (albeit to a varying degree depending on the perceived importance of the tourism industry) regional platforms that oversee and analyse the supply and demand of skills and competences at vocational and higher education level.

In summary, the industry has a short-term and immediate need for hotel and restaurant competence. In particular qualified chefs, which appears a nationwide shortage. Regionally, further capacity and competence is needed to be able to pursue strategies to develop niche sectors, such as the (spa) weekend tourism concept.

In the medium- and longer-term, more strategic skills including commercial and destination management, and entrepreneurship will become increasingly important, in particular to match the very ambitious tourism strategy currently being implemented.

**Yet, most of the occupations do suffer – to some extent – from gaps in provision or are likely to do so in the future.** A fairly recent mapping exercise of tourism education courses concluded that in the last years (up to 2012) the number of tourism programmes has decreased in all areas of education with the only exception being postgraduate courses.<sup>62</sup> This decrease is partly explained by an apparent low quality (according to the monitoring agency) of Yrkeshögskolan's vocational programmes.<sup>63</sup>

HVEs must reapply for support every two years.<sup>64</sup> The latest application round (i.e. applications by education providers to the Swedish National Agency for Higher Vocational Education to start a tourism course/programme) shows that in 2014 HVE providers applied for a total of 1,337 courses of which 979 were declined, i.e. just over a quarter (26% or 358) of courses were granted funding.

**In summary, the industry has a short-term and immediate need for hotel and restaurant competence.** In particular qualified chefs, which appears a nationwide shortage. Regionally, further capacity and competence is needed to be able to pursue

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<sup>61</sup> Interview feedback

<sup>62</sup> Tillväxtverket (2012) Turismutbildningar Utbud, förändringar och hållbarhet

<sup>63</sup> Ibid.

<sup>64</sup> Ibid.

strategies to develop niche sectors, such as the (spa) weekend tourism concept.

**In the medium- and longer-term, more strategic skills including commercial and destination management, and entrepreneurship will become increasingly important, in particular to match the very ambitious tourism strategy currently being implemented.**

In terms of numbers of qualified students needed, the short-term needs coupled with the strategic aims (if achieved), means that in all likelihood the industry could use additional capacity in the 1000s.

**One overarching issue is that the tourism industry in Sweden face competition for public educational funds from other sectors (IT, healthcare, economics, engineering). Of course, the industries also compete for skilled and competent labour.**

**The lack of educational opportunities is however recognised. In a 2012 report<sup>65</sup>, the National Agency for Higher Vocational Education suggests increasing the supply through additional programmes and student places in some counties, both within tourism studies as well as within entrepreneurship more generally.**

There is no evidence for suggesting that the educational programmes that do exist are other than high quality initiatives and which take into account the (changing) needs of industry. Having said this, individual representatives of the tourism industry have criticised the education system for, among other things, a lack of knowledge among teachers of the national strategy for tourism, a lack of inclusion of businesses and sales courses, and a perceived focus of the education system to supply 'employees' rather than 'entrepreneurs'.<sup>66</sup> Yet no systemic failures or shortcomings can be identified in the programmes offered.

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<sup>65</sup> Swedish National Agency for Higher Vocational Education (2012) Regional efterfrågan och kompetens inom yrkeshögskolan

<sup>66</sup> Swedish National Agency for Higher Vocational Education (2012) Regional efterfrågan och kompetens inom yrkeshögskolan

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## **Annex B: List of interviewees**

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### **Interviewees**

Stina Algotson, Besöksnäringens forsknings- och utvecklingsfond

Hans From, Besöksnäringsskolan Dalarna

Lotta Johansson, VISITA

Pehr Palm, STU - Sveriges Turismutbildningar

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## **Annex C: List of Abbreviations**

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Association of Swedish Travel Agents and Tour Operators	SRF
European Tourism Research Institute	ETOR
Higher Education	HE
Higher Vocational Education	HVE
Non Governmental Organisations	NGO
R&D Fund of the Swedish Tourism & Hospitality Industry	BFUF
Small and Medium sized Enterprises	SME
Swedish Tourist Educations/Sveriges Turismutbildningar	STU
Travel Academy AB	TRAC
Travel Education Centre	TEC