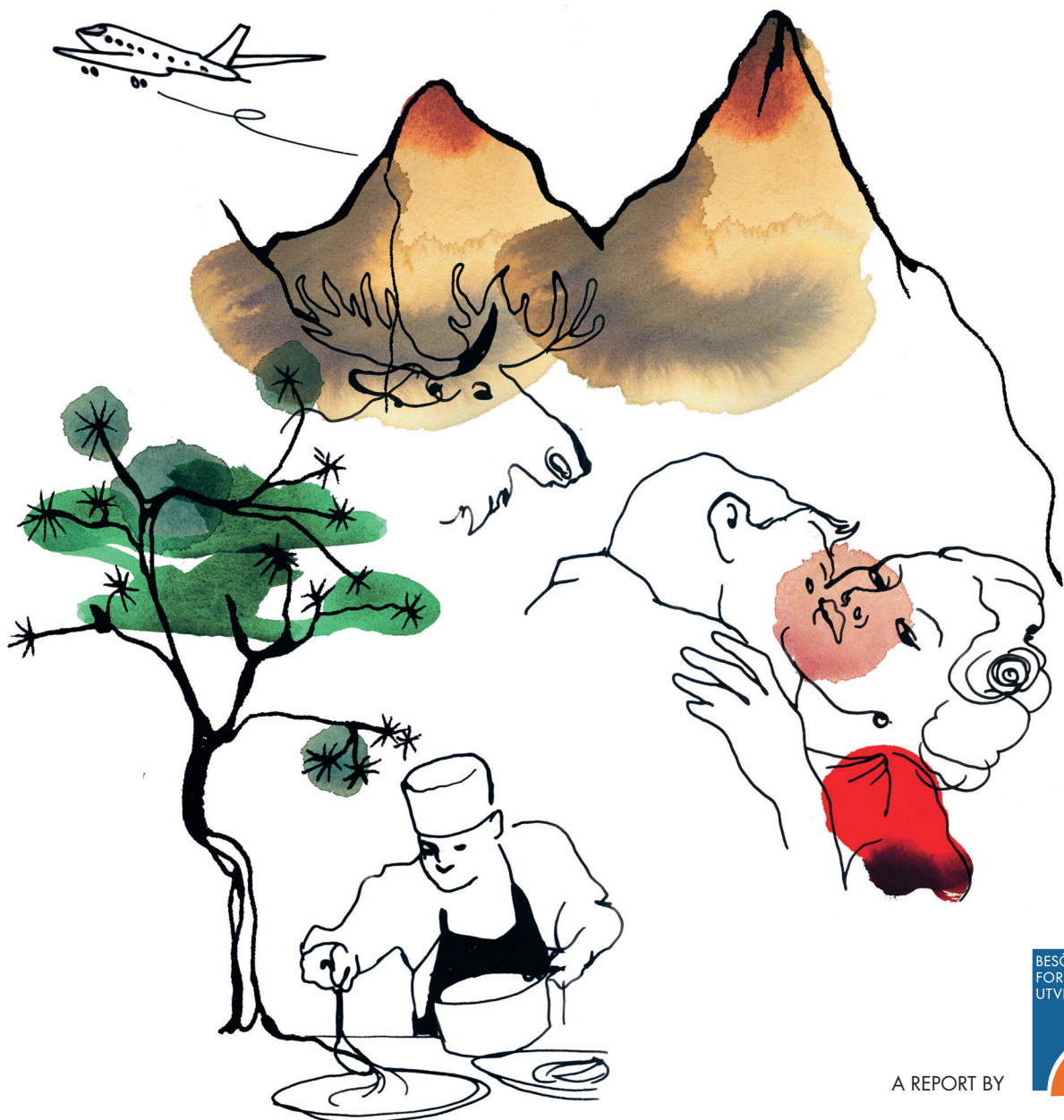


#01/2013 SWEDEN'S MOST ATTRACTIVE INDUSTRY



BESÖKNÄRINGENS
FORSKNINGS- OCH
UTVECKLINGSFOND

A REPORT BY

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FOREWORD

Our industry faces both great opportunities and challenges. The hospitality industry is now one of Sweden's primary sectors. It is growing faster than GDP, and will double its turnover over the next decade. At the same time, we face a high risk of there being a skills gap in the future. Staff turnover in the industry is generally rapid. Many people regard it as a short-term, temporary workplace, with poorly defined career paths.

Visita – Swedish hospitality industry and HRF (Hotel and Restaurant Union), the hospitality industry's trade associations, believe that one of our most important issues for the future is how to attract and retain the best skills. Together with the research and consulting firm Kairos Future, we initiated the "Sweden's most attractive industry" study, which was conducted in 2012. Within the framework of the project, and in addition to a number of sub-studies, we have mobilised the industry to generate ideas and proposals through workshops and analysis meetings.

The purpose of the study was to gain in-depth knowledge of the skills challenge. We have studied the trends relating to the employees, leaders, recruitment and employer branding of the future. We have examined values and perceptions not only among people working in the industry today, but also among young people who are not. The analysis shows that we need to develop leadership, invest in our people, work together and become involved in efforts to improve the work environment.

Although more than half of Sweden's 14/15-year-olds are very interested in a career in the industry, interest falls dramatically (to approx. 25 %) by the time they are 20. Many in that group have the impression that the industry offers poor job security and a lot of stress, and that training to get a job is not important or of any value. As one way of reaching the very young, Visita launched the "Sweden's future is yours" campaign in January. It is aimed at 15-year-olds (and their parents) who are facing their further education options. The campaign has been successful, and a definite step on the way to supporting the long-term skills supply. However, more work and investment are needed.

We brought together senior managers from the industry (representing major hotels, restaurants, lunch restaurant chains, camping and mountain tourism) on 19 February 2013 to discuss the results presented in this report, and what we can and must do. Many interesting opinions and ideas emerged. Several people raised issues such as the problem of the industry's media image being old and outdated. We need to respond to this, and to contribute jointly to an updated and more nuanced image of the industry's various professions and career paths, for example by highlighting individuals who have achieved exciting careers without being celebrities. There is more to us than "angry cooks". We need to emphasise entrepreneurship, and show that there are multiple ways of entering the industry.

The next step involves concentrating our efforts and working together. Visita and HRF are offering to be a platform and support for this. They want to work with companies strategically and consciously to attract and retain skills, and to help update the industry's image. Everything will then be in place to allow us to achieve our goal of the hospitality industry being Sweden's most attractive industry.

Ella Niia (HRF) and **Eva Östling**, (Visita)

Stockholm, March 2013

1 / INTRODUCTION

A primary sector facing challenges

The hospitality industry is now one of Sweden's primary sectors. In "National Strategy for the hospitality industry – strategy 2020", the industry formulated the ten-year goals of doubling tourism turnover to SEK 500 billion and increasing the number of employees to more than 250,000. Achieving this requires, among other things, the industry being able to attract and retain skilled workers. Today, staff turnover is high (25 %), and a large fraction of the workforce is young (30 % under 24). Some groups also have the impression that the industry has some irresponsible and unreliable employers. How should the industry and other relevant participants counter this?

Purpose of the project

The purpose of the "Sweden's most attractive industry" project is to increase knowledge about how the industry is perceived both by potential employees, who are mainly young people, and by those currently working in it. A comprehensive strategic marketing plan has been developed based on this knowledge. It contains proposals that should lead to the industry's attractiveness being reinvigorated and increased – and to the industry becoming the most attractive in Sweden.

Project implementation

The project was initiated by Utbildningsrådet för Hotell och Restauranger (UHR, Hotel and Restaurant Training Council). It is funded by the Research and Development Fund of the Swedish Hospitality Industry (BFUF), which is owned by Visita and HRF. The project was carried out in 2011-12. Kairos Future was responsible for the basic data and the summary, and also led the analytical work. The methodology, sources and other information are reported on pages 22-23.

Survey-based information gathering

Information was gathered through three sub-surveys:

- Monitoring trends – business analysis and survey of tomorrow's employees generally
- Survey of values in working life among potential employees (young people)
- Survey among employees of how they perceive their industry

The results were discussed and analysed in a group of 50 representatives from the hotel, restaurant and fast food sectors, relevant training courses, Visita and HRF. The results were then further analysed in a smaller group comprising Visita's HR managers.

Results/Marketing Plan

The analysis group has summarised the results of the surveys in a marketing plan. It focuses on communication, and contains proposals for primary target groups, messages, communication channels, activities and tonality. The plan includes proposals for how both external and internal communication should be used.

2/PROPOSALS FOR INCREASING ATTRACTIVENESS

Everything is in place for the hospitality industry to grow and become an even more important element in Sweden's economy and competitiveness. The goal is to double turnover in the next ten years. One condition for achieving this is that we are able to attract and retain skilled workers. How can the industry become more attractive to work in? And how should we respond to a new generation, with new demands?

During work on the "Sweden's most attractive industry" project, a number of proposals and success factors have been defined, and a marketing plan has been developed that should contribute to achieving the goal of increasing the industry's attractiveness. Achieving this goal requires strategic change management (in terms of skills development opportunities, for example), cooperation across the industry and, not least, commitment and drive at management level.

Some of the proposals are described briefly below, and in more detail later in this report. There are also summaries of the three surveys underlying the proposals.

Invest in leadership

Leadership in the industry must be developed. Young people have and will have different demands. They expect clear leadership, with the managerial role being one of coach rather than leader. They also have higher expectations for feedback and clarity. The industry needs to be more focused on leadership and management training.

Invest in existing employees

If we are to encourage employees to stay in the industry, there must be more skills and career development opportunities. Proposals include establishing clear development plans for employees, introducing bonus schemes or various types of partnerships, and reviewing long-term pay trends in the industry.

Cooperation and involvement in the industry

The industry must become more involved in the design and execution of training courses to raise their quality and relevance. This requires better cooperation, both within the hospitality industry and with the wider economy. Forms of cross-industry career paths that enable skills to be enriched and developed should also be identified and encouraged. Other possibilities for assuring the quality of the industry are apprenticeships, a hospitality industry college, requirements for vocational certification and employment tests.

Improve work environment and endeavour to reduce stress

Many young people are concerned that the industry is stressful, that the work environment is poor and that job security is perceived as worse than in other industries.

Invest in research and development

Initiate research into the industry, as a basis for influence or action.

3/MONITORING TRENDS EMPLOYEES AND LEADER OF THE FUTURE

The investigation is based mainly on studies of working life carried out by Kairos Future. The studies include people from all age groups.

Summary

Tomorrow's employees

- Want freedom and personal development
- Value the social aspects – a good manager and congenial colleagues – highly
- Want a workplace with a good gender balance

Tomorrow's leadership

- Ever higher demands are being imposed on managers
- Leaders are changing from being authority figures to coaches
- Power and responsibility are shifting from managers to employees

Tomorrow's recruitment

- Technology is going to transform recruitment processes. Social networks will be more important than CVs
- Games will be used to determine a person's suitability for a job

Employer branding

- Employer branding (i.e. an organisation's performance as an employer, and how this is perceived) is becoming increasingly important

Success factors

- Knowing what young people demand from an employer will become a competitive advantage in the hunt for the best employees
- The ability to offer freedom, feedback and clarity is the way to retain employees
- The ability to innovate in the recruitment process reduces the risk of misjudged recruitment
- Honest and carefully considered employer branding, embraced and disseminated by employees, attracts the "right" people to the organisation

Tomorrow's employees

The dream job: freedom and personal development

When more than 6,000 Swedes were asked about their dream job (autumn 2011), top of the list came HR manager, entrepreneur and engineer. Among students, engineer came top. The two most important aspects of the dream job concern individual development and freedom – what the job gives me, rather than what I can influence or what I can accomplish through the job.

The answer to the question: "What makes a job a dream job?" was¹:

Excitement and personal development	67 %
Opportunity for extensive personal freedom	36 %
Gives me the opportunity to help others	27 %
Gives me the opportunity to improve society	20 %
Opportunity for high pay	18 %
Confers high status	8 %
Safe and secure	6 %
Other	12 %

Social aspects important for satisfaction

In Sweden, the social aspects of work are extremely important, both for satisfaction and for a company's attractiveness. Young people in the Nordic countries distinguish themselves in this respect from a global perspective. Values relating to the social aspects of work – such as congenial colleagues and a good manager – are valued far more highly in Scandinavia than in, for example, Asian countries. ²

Good gender balance attracts young workers

Companies and organisations that succeed in attracting young talent get it right in one area above all: they have created a good gender balance among their employees. Young people are not attracted to workplaces that are strongly dominated by either men or women. A good mix is attractive. ³

Competition in the labour market increases loyalty to employers

One trend mentioned frequently is that young people are becoming less loyal to their employers. The explanation is in part only natural: they are at the beginning of their careers. But the view of loyalty, which is strongest among older people (born 1945-54), has reversed its decline somewhat in the 1985-1994 cohort. Among them, a higher proportion believe that one should be loyal to one's employer. One explanation might be their experience of much tougher competition in the labour market. Approx. 40 % of young employees (age 20-30) feel loyalty towards their employers. Unsurprisingly, loyalty increases when employees are happy in their work. However, job satisfaction is no guarantee that employees will stay in their

jobs. As many as 23 % of satisfied young employees would consider changing their workplace in the next six months. ⁴

Career more important than managers believe

When young employees are asked how important a career is to them,

65 % say it is important or very important. Men and women give equal importance to a career. However, managers see things differently, with 51 % of them believing a career is important to young people.

Nine out of ten young people think continuous personal development is crucial to a career being considered successful. "Becoming a manager" ranks only sixth. ⁵

Tomorrow's leadership

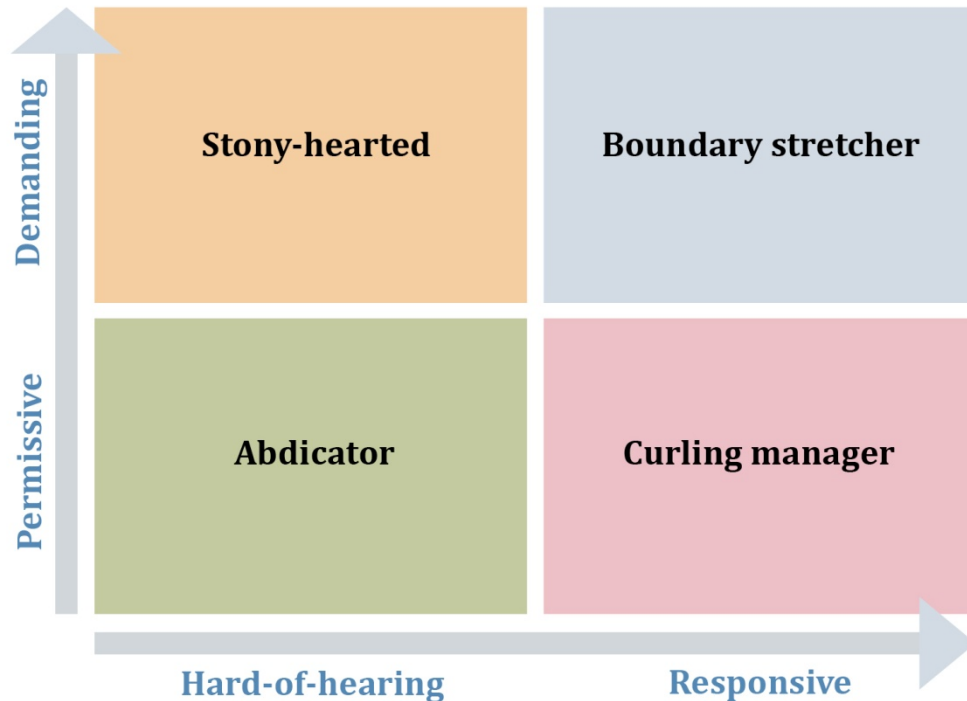
Dream manager is responsive

The image of the dream manager as being listening, affirmative and attentive is shared by practically all young people, whatever their educational backgrounds. ⁵

The word cloud shows words that young employees from all industries have chosen to describe their image of a good manager. Responsiveness is by far the most common; listen, listening, communication, encouragement and understanding are common. Another recurring theme is clarity, with words such as straight, decision and fair. Perhaps this is only natural for a group of employees who have recently entered the world of work and, in many cases, are still getting to grips with their new roles. ⁵

The four types of manager

How satisfied people are with their manager is associated with the extent to which demands are made. Young employees who describe their manager as both responsive and demanding, i.e. someone who stretches them, are most satisfied. There are therefore two main ingredients in the recipe for leading young people successfully: responsiveness and making demands. Both characteristics are important for success. Young employees' images of good managers fall into four types. ⁵



From manager to coach

When managers are asked to assess what the leadership of the future will be like, they think responsibility will have largely shifted from manager to employee. And when they are asked how 20-30-year-olds are in the workplace, 66 % respond that they are questioning and 58 % that they need encouragement. ⁶

Tomorrow's recruitment

CV less, social media more important

Technology will transform all areas of working life, and perhaps especially recruitment. Compared with submitting a CV in response to a job ad, social networks will become more important. Thanks to the internet, employers and employees can discover things about each other before they meet. In the future, games will be increasingly important in determining the most suitable candidate.

More reciprocal reference checks

Leadership is very important for a company's attractiveness as an employer. Many job seekers investigate the quality of leadership at a company before deciding to apply for a job there. Nearly half (48 %) of people seeking a new job will first try to establish whether the manager is good. Among unemployed job seekers, the figure is 26 %. Among all job seekers, 30 % say they check out the manager before accepting a job. ¹

Employer branding

With companies increasingly adopting employer marketing (employer branding), HR managers think this will be the hottest topic in HR going forward. Employees will have an increasingly important role as carriers of the organisation's brand. ⁷

Success factors and recommendations

Success factors

Knowing what young people demand from an employer will become a competitive advantage in the hunt for the best employees. It is a matter of knowing what tune to play in order to attract the best.

Being able to offer freedom and clarity is the way to retain employees. While freedom and personal development are important to tomorrow's employees, clear leadership and continuous feedback are also required.

The ability to innovate in the recruitment process may be a profitable investment that prevents misjudged recruitment. Taking advantage of the technological opportunities and public networks available makes it easier to find employees.

Honest and carefully considered employer branding, embraced and disseminated by employees, will automatically lead to the right people finding their way to a workplace. If employees represent the organisation's brand, they attract the right people through their personal network.

Recommendations

The recommendations to the hotel and restaurant industry emerging from the study are, first and foremost, to learn as much as possible about what employees want, which is already happening as a result of this project. Further, to develop leadership in the industry around the concepts of freedom, feedback and clarity. And to review the potential application of technology in the recruiting process and, perhaps most importantly, to establish what the organisation represents and ensure that employees share that image.

4/ WHAT DO YOUNG PEOPLE THINK ABOUT THE INDUSTRY?

The results come from a questionnaire survey (May 2012) aimed at young people aged 15-25.

Summary

- The restaurant industry has a positive atmosphere in the workplace, with congenial co-workers
- The stress is high
- Of these young people, 45% consider training "not at all important" or "not very important" to get a job in the hotel and restaurant industry

Congenial co-workers and high stress

When young Swedes (aged 15-25) are asked to say what spontaneously comes to mind when they think of the hotel and restaurant industry, five themes dominate: food, service, stress, poor/low pay and unsocial/excessive hours.

Hotel and restaurant industry relative to others

Young people feel the hotel and restaurant industry is better on average than many other industries with respect to two of the three qualities they attach the most importance to in a job: a positive atmosphere and congenial co-workers.

The hotel and restaurant industry is perceived to be inferior to other industries with regard to pay, job security, opportunities for long holidays, the status of the industry, working hours and the work environment.

The hotel and restaurant industry is *superior* to other industries with regard to:

1. The opportunity to take a lot of responsibility
2. Having congenial co-workers
3. Being able to provide a service that matters to other people
4. Opportunities to work/travel in other countries
5. Getting constructive feedback
6. Opportunities to work flexible hours

The hotel and restaurant industry is *inferior* to other industries with regard to:

1. Pay
2. Job security
3. Opportunities for long holidays
4. The status of the industry
5. Opportunities to work fixed hours
6. Work environment

Six vocational upper secondary school programmes – where do they lead?

When young people are asked about their image of what six different vocational upper secondary school programmes lead to, with regard to pay and employment and career potential, they say:

- Nicest tasks – training for work with children and in leisure ranks as number one, with hotel and restaurant training courses at number two
- Easiest way to get a job – young people think it is easiest to get a job after training in building and construction, and hardest in hotels and restaurants
- Most stressful jobs – nearly half of young people believe that hotel and restaurant-training courses lead to jobs with the most stress, while 27 % think these are in health and social care
- Highest pay – the majority of young people believe that training in building and construction leads to the highest pay. There is little between the other training programmes, with courses for working with children and in leisure at the bottom
- Best career opportunities – the majority think their career opportunities are greatest if they choose a course in building and construction, with hotel and restaurant courses at number three

Is training important to get a job in the hotel and restaurant industry?

Very important	15 %
Quite important	40 %
Not very important	34 %
Not at all important	11 %

Psychologist – most popular occupation

The following occupations are most popular among young people:

1. Psychologist
2. Engineer
3. Computer programmer
4. Scientist
5. Interior designer
6. Journalist
7. Tour guide
8. Police officer
9. Architect
10. Doctor
11. Teacher
12. Lawyer/Solicitor
13. Entrepreneur
14. Chef
15. Hotel manager
16. Marketing person
17. Business economist
18. Estate agent
19. Nurse
20. Electrician
21. Carpenter
22. Chemist
23. Construction worker
24. Receptionist
25. Mechanic
26. Waiting staff
27. Restaurant manager
28. Stockbroker

Views of the industry differ among age groups

Before choosing their upper secondary school, many people are open to a career in the hotel and restaurant industry. Over half of 14/15-year-old respondents would consider it. The proportion falls to only about 25% among people age 20-plus. The view of the hotel and restaurant industry differs most in the following areas, related to the 15-18 year-old and 19-25 year-old cohorts.

	15 – 18 years	19 – 25 years
Opportunity to work in healthy environments	37 %	18 %
Provision of good benefits	33 %	18 %
Opportunity to work on something interesting and worthwhile	35 %	20 %
Employees' energy and commitment to work	38 %	24 %
Opportunities to work fixed hours	27 %	14 %

Positive towards apprenticeship programmes

A majority of young people who are interested in the hotel and restaurant industry have a positive attitude to apprenticeship programmes.

"Would you consider starting a career in hotels and restaurants in an apprenticeship/traineeship programme, where theory and practical work are sandwiched according to a defined training programme, and while being employed on lower pay?"

Yes, definitely	22 %
Yes, possibly	44 %
No, probably not	27 %
No, definitely not	7 %

Young people's image of the industry in summary

- 45 % consider training "not at all important" or "not very important" to get a job in the industry
- Chef or hotel manager seem to be more interesting than marketing person, business-economist or construction worker. Restaurant manager and waiting staff come lower down the list
- 10 % would "definitely" consider a career in the industry, and 24% "yes, maybe"
- The two most commonly cited reasons for being attracted to the industry are working with people and the social dimensions
- Openness to a career in the industry is significantly higher in the younger group (15-18) than in the older (19-25), with no gender differences
- Young people who would consider a career in the industry are also more interested in occupations such as tour guide, teacher and police officer. It strengthens the theory that the social aspects of the job are attractive to many people
- One in four of those contemplating taking the hotel and restaurant programme in upper secondary school ultimately chose the social science programme instead. This makes the latter the most important alternative to hotels and restaurants in upper secondary schools.
- Rather more young women (18 %) than men (13 %) said they were contemplating taking the hotel and restaurant programme in upper secondary school
- When young people are asked to name famous people in the industry, Gordon Ramsay and Jamie Oliver are well ahead, with nine out of ten knowing who they are. Per Morberg comes third
- 20 % of young people say they know who Markus Aujalay is, and 5% Tommy Myllymäki

5 / WHAT DO EMPLOYEES THINK ABOUT THE INDUSTRY?

The results come from a questionnaire survey (June-July 2012) aimed at employees within the hotel and restaurant industry.

Summary

- Employees are satisfied with: colleagues, the workplace atmosphere, the sense of energy and commitment
- Employees are dissatisfied with: pay, opportunities to influence their work situation and stress

Are employees in the industry satisfied with their jobs?

Satisfaction

The most common sources of work satisfaction among non-managerial employees are: colleagues, the workplace atmosphere, the sense of energy and commitment to the job, and the people.

Dissatisfaction

The most common sources of dissatisfaction are: pay, opportunities to influence their work situation, benefits, work environment and stress.

The sense of pride and importance are significantly more common sources of satisfaction in "hotels and restaurants" than in "fast food". The lack of interesting/stimulating tasks is a significantly more common source of dissatisfaction in "fast food" than in "hotels and restaurants".

The industry in relation to others

In terms of how their current job is perceived, there is little difference between non-managerial employees in "hotels and restaurants" and the average in Sweden. The differences are greater among non-managerial employees in "fast food". Non-managerial employees in "hotels and restaurants" and "fast food" have a more positive image than the average in Sweden with regard to: career opportunities, the opportunity to lead and develop others and job security. They have a more negative image with regard to: pay, opportunities to influence their work situation, and the work-life balance.

Identify those loyal to the industry

Every industry has employees who consider their current job to be very close to, reasonably in line with, or far from their dream job. Employees who think their job is far from their dream job are probably difficult to retain in the industry. Those loyal to the industry are people who perceive their job as their dream job or closely in line with it. To reduce staff turnover and retain the right staff, the focus should

therefore be on identifying and influencing the latter group. They represent approx. 60 % of employees in "hotels and restaurants", and approx. 40 % in "fast food".

Among those who consider themselves to have their dream job or something reasonably close, 45 % of those in "hotels and restaurants" and 23 % of those in "fast food" plan to remain in the industry for 5-10 years. In both groups, approx. 20% think they will have left by that time.

Managers' images of the hotel and restaurant industry

Managers tend to have a more positive image of their work than non-managerial employees. This remains true in the hotel and restaurant industry.

The major common sources of satisfaction with work are: colleagues, opportunities to lead and develop others, opportunities to shoulder/take responsibility and the workplace atmosphere.

The major common sources of dissatisfaction are: pay, benefits, the work-life balance, getting feedback and getting appreciation and acknowledgement.

The industry's managers compared with others

Managers in "hotels and restaurants" differ from Swedish managers in general with regard to having a:

- more positive image with regard to support/feedback at work
more positive image of their own managers
- more positive image of career opportunities
- greater sense of pride in their job

Managers in "fast food" differ from Swedish managers in general with regard to having a:

- more positive image of career opportunities
- greater sense of job security
- greater perception of being able to lead and develop others
- significantly lower sense of having a job that provides independence
- perception of lower pay
- lower perception of having an interesting/rewarding job. perception of poorer work-life balance

Definitions

Hotel and restaurant refers to employees in the hotel and restaurant industry other than in the fast food sector.

Fast food refers to employees in the fast food sector.

Satisfied – Respondents were asked to describe the best and worst things about their jobs and to give an opinion on 29 different statements. To be classified as satisfied on a particular matter, a respondent must fulfil two criteria:

- He/she must have indicated that they feel the quality mentioned is important/very important in a job
- He/she must have indicated that the quality is relatively/completely present in the current job

6/MARKETING PLAN

The analysis group has summarised the results of the surveys in a marketing plan. The plan focuses on communication, and contains proposals for achieving the goal of the industry becoming more attractive and, by extension, becoming Sweden's most attractive industry.

The plan covers primary target groups, messages, communication channels, activities and tonality, and includes suggestions for how both external and internal communication should be used.

Summary

Proposals for increasing the industry's attractiveness

- Invest in leadership
- Invest in existing employees, for example by increasing opportunities for personal development
- Endeavour to reduce work environment stress
- Establish well thought-out plans for skills development
- Create internships and invest in apprenticeship schemes
- Invest in research and development

Overarching message

Working with people – the most rewarding thing you can do!

Target groups for communication

The surveys show that openness to a future career in the hotel and restaurant industry is greatest at the senior secondary school level. The analysis group therefore identified the primary external target groups as young senior secondary students, their parents and educational advisers at senior secondary level. Although at that age many people have only vague notions of what they want to be, it is important to "sow a seed" and initiate a dialogue early.

Several areas need to be improved if young people are to perceive the industry as attractive. Top management and managers in the industry are important in this work, and are therefore the primary internal target group.

Primary target groups

The following target groups have been identified as primary.

Internal

Top management Managers

External

Senior secondary school students

Parents of senior secondary school students

Educational advisers and careers officers at senior secondary level

Secondary target groups

The following target groups have been identified as secondary.

Internal

Employees
HR departments

External

Competitor occupations (commerce, healthcare and transport)
Upper secondary school students
Educational advisers and careers officers in upper secondary schools
Professionals/experts
Under-represented groups (e.g. female chefs/ethnicity)
Older people/senior citizens
Media
Newly arrived immigrants

Message to be communicated

(A) Overarching message:

Working with people – the most rewarding thing you can do!

What distinguishes the hotel and restaurant industry from many other industries is the perception among employees and prospective employees that one can really make a difference to another person. Making other people feel good is something to be proud of. Providing good service is hard, and requires skill and expertise.

The message is at the core of communication because, as it emerged in the results of the various parts of the project, it clearly helps to engender pride internally.

(B) Main message:

Team spirit and belonging

People working in the industry are strongly united on the best things about the job being the congenial colleagues and the workplace atmosphere. The explanation could be that people with good social skills tend to gravitate towards the industry. This aspect is particularly important to young people, and is therefore emphasised as one of the main messages

(C) Main message:

Pace and pulse

The hotel and restaurant industry is often perceived as stressful. It is difficult to completely eliminate this downside, so it is important to steer the right people into the industry. We want to attract people who work well under pressure, enjoy the hustle and bustle and challenges and regard the fast pace as something positive.

(D) Main message:

Individually tailored development and flexibility

Personal development is the new career concept for young people generally. For young people, it is more important to have individual development goals than to have established traditional development stages. Communication should therefore emphasise that the industry offers great opportunities for that kind of individually

tailored development, not only for people who are happy to stay where they are but also for those who want to progress. The industry also offers ample opportunities to tailor hours and capacity to life stage and personal preferences.

(E) Main message:

Safe venture (reputable, job-creating industry that is growing)

The hospitality industry and the hotel and restaurant industry are industries of the future expecting strong growth going forward, in terms of both domestic consumption and foreign visitors. There are many major and reputable employers to choose from, many of them international groups.

The message is aimed particularly at adult target groups (parents, educational advisers and careers officers) who need to be given an up-to-date picture of the industry as a reliable employer.

7/PROPOSALS

How can the industry become more attractive to work in? And how should we respond to a new generation with new demands?

Invest in leadership

- More focus on leadership and management training. Shorter supplementary training, approx. one month?
- Set up incentive schemes for good leadership and include this in appraisals
- Create clearer development plans for all employees

Invest in existing employees

- Set up bonus schemes/partnerships
- Review long-term pay structures in the industry (it should be worth staying)
- Create opportunities for people to control their own time by being able to plan their own schedule through workforce rostering

Personal development

- Ensure all employees have personalised training plans
- Create simple tools for development discussions

Endeavour to reduce work environment stress

Cooperation

- Cooperate within the industry towards common goals
- Set up forums where the industry can meet and discuss common issues

Skills development

- The industry must become more involved in the design and implementation of training courses to raise their quality and relevance
- Skills development for employees with less than three years' experience in "service management"
- Establish a hospitality industry college
- Encourage cross-industry careers paths that enrich and develop skills
- Raise the level of restaurant and hotel training through close cooperation with the wider economy. Impose requirements for vocational certification
- Introduce employment tests

Internships

- Create good internships that are sufficiently attractive to generate competition for them Internships and apprenticeship schemes that include at least six months' work experience
- Provide regulated apprenticeship places/apprentice jobs with a clear plan for their content

Research and development (R&D)

- Initiate research into the industry as a basis for influencing or acting
- Invest in research as a continuation of studies in the hospitality industry

8 / METHODS AND OTHER INFORMATION

Monitoring trends – business analysis and survey of tomorrow's employees generally

The report is based mainly on studies of working life conducted by Kairos Future, supplemented by other research. Studies that have been used are:

- Manpower Work Life: 8 surveys conducted 2008-12; approx. 6-8,000 respondents per survey
- Global Youth: conducted 2007; 22,000 respondents from young people worldwide.
- The art of leading young people: conducted 2011; 1,500 respondents from young employees and managers
- HR in turbulent times: conducted 2012; 140 respondents from HR managers.
- Successful generational shift: conducted 2010; 600 respondents from HR managers

In addition to the reports, supplementary trend research has been carried out, primarily in the areas of employer branding, leadership and recruitment.

Survey of values in working life among potential employees (young people)

Questionnaire survey answered by 1060 young people aged 15-25, conducted May 2012 by Kairos Future on behalf of Visita and UHR.

Survey among employees of how they perceive their industry

Questionnaire survey to selected members of HRF and the hotel and restaurant employees' unemployment benefit office (mailing administered by HRF) and to a number of HR managers in companies affiliated to Visita (questionnaire distributed by Visita), answered by 1,100 people, conducted June-July 2012.

The responses were analysed separately for four groups of respondents: managers in hotels and restaurants, managers in the fast food sector, other employees in hotels and restaurants and other employees in the fast food sector.

Managers in hotels and restaurants

Number of respondents: 290

Average age: 40

Proportion women: 55 %

Managers in the fast food sector

Number of respondents: 80

Average age: 25

Proportion women: 70 %

Other employees in fast food

Number of respondents: 230

Average age: 22

Proportion women: 80 %

Other employees in hotels and restaurants

Number of respondents: 440

Average age: 35

Proportion women: 70 %

Analysis and marketing plan

The results were discussed and analysed in a group of 50 representatives from the hotel, restaurant and fast food sectors, relevant training courses, Visita and HRF. The results were then further analysed in a smaller group comprising Visita's HR managers. The analysis group has summarised the results from the surveys and from the discussions in a marketing plan.

Footnotes:

1. MANPOWER WORK LIFE/KAIROS FUTURE
2. GLOBAL YOUTH, KAIROS FUTURE
3. FRAMGÅNGSRIK GENERATIONSVÄXLING (SUCCESSFUL GENERATIONAL SHIFT), KAIROS FUTURE
4. LOJALITETEN MOT ARBETSGIVAREN I OLIKA GENERATIONER (LOYALTY TO EMPLOYER IN DIFFERENT GENERATIONS), MANPOWER WORK LIFE/KAIROS FUTURE
5. UNGA OCH DRÖMSAMHÄLLET (YOUNG PEOPLE AND THE DREAM SOCIETY), KAIROS FUTURE 2010
6. KONSTEN ATT LEDA UNGA (THE ART OF LEADING YOUNG PEOPLE), KAIROS FUTURE
7. FRAMTIDENS LEDARSKAP ENLIGT CHEFER. VAD TROR DU KOMMER KÄNNETECKNA LEDARSKAPET UNDER 2010-TALET? (THE LEADERSHIP OF THE FUTURE ACCORDING TO MANAGERS. WHAT DO YOU THINK WILL CHARACTERISE LEADERSHIP IN THE 2010s?), KAIROS FUTURE/TIDNINGEN CHEF
8. HR I TURBULENTA TIDER (HR IN TURBULENT TIMES), KAIROS FUTURE

#01 SWEDEN'S MOST ATTRACTIVE INDUSTRY

March 2013

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