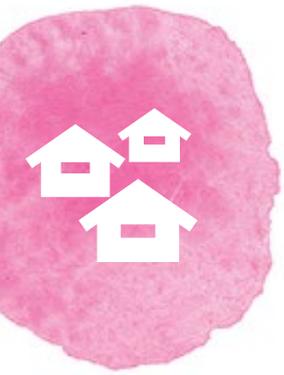


SWE-INVIT 2013

The Swedish Tourism and Hospitality Industry's
Research and Innovation Agenda 2014 - 2030



EDITORIAL INFORMATION

This is the **Swedish Tourism and Hospitality Industry's Research and Innovation Agenda 2014 - 2030**. The objective is to strengthen Sweden as an attractive, innovative tourism destination and Sweden's position as an export nation in the area of tourism. This Agenda is developed within the VINNOVA programme Strategiska forsknings- och innovationsagendor 2012/2013 by universities (Mid Sweden, Umeå, Dalarna, Karlstad, Örebro, Uppsala, Göteborg, Lund, Linneaus) companies, industrial organisations (Svensk Turism AB, Visita, Transportgruppen), workers union (HRF) authorities (The Swedish Agency for Economic and Regional Growth and Visit Sweden) under the co-ordination of BFUF, the R&D Fund of the Swedish Tourism & Hospitality Industry, which jointly own all rights to this document.

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Illustrations, photo:

Editors: **Stina Algotson**, BFUF, **Peter Berggren**, Knowit, **Anna Hag**, Visita, **Malin Ackholt**, HRF,

Lena Larsson, HUI Research AB

Design: **Jesper Fermgård**, TILLS

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Contact: info@bfuf.se, www.bfuf.se

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RECOMMENDED KEY INITIATIVES

The five recommended key initiatives - five steps for innovation.



Research

- . Knowledge for the future



Competence

- . Get our new co-workers on the bus, and make them stay
- . Future leaders for growth



Accessibility

- . Make the trip easy
- . Find Sweden



Destination/Themes

- . Product/offer development
- . Ecosystem development



Cooperation

STARTING POINT AND AIM

The starting point of this agenda is the national strategy for the Swedish tourism and hospitality industry¹, which has been developed in dialogue between the various actors² of the industry and at the initiative of Svensk Turism AB. In this process, an analysis of where the Swedish tourism and hospitality industry currently stands has been developed, and a number of challenges have been identified. In order to realize Vision 2020 for the tourism and hospitality industry, the national strategy states the work to be carried out within seven main strategies.

- . Destination development
- . Financing
- . Cooperation
- . Marketing
- . Entrepreneurship and skills
- . Sustainability
- . Infrastructure

This National Research and Innovation Agenda for the Swedish Tourism & Hospitality Industry represent a deeper analysis of how structures and activities in research and innovation can be strengthened in order to support the goals in the Vision 2020. The purpose is to create a common vision and a commitment within the sector in order to indicate the prioritizations of the research efforts and investments that are needed in order to create good innovation ability. The agenda shall identify the needs that should be addressed and the cooperation that is required.

If collaboration is strengthened with both new and traditional industries, the tourism and hospitality industry can take an important role to raise Sweden's future competitiveness. Simultaneously, the industry is young, research into the industry is limited and fragmented, and the link to the innovation system is weak, as is the link to companies and development within other Swedish areas of strength. For this reason, we need to work forcefully in order to drive the development of knowledge, skills and innovative ability within the tourism and hospitality industries

This agenda is furthermore to be seen as a complement to the Swedish National Innovation Strategy, SNIS, which was presented in autumn 2012, and which aims to mobilize individuals, large and small companies, organizations, public actors and research/academia to work together to ensure Sweden can meet global social challenges, create a competitive edge and employment in a global knowledge economy and deliver social services with increased quality and efficiency.



VISION AND GOALS

Every step will focus the visitors perspective and integrates sustainablilty as a core value.

Focus - export and job creation

This Research and Innovation Agenda has an overall focus in positive change in Swedish tourism export and job creation. The tourism and hospitality industry has an important role in job creation. In a global context the industry now accounts for one in eleven jobs on the planet, a number that could even rise to one in ten jobs by 2022, according to the World Travel & Tourism Council.

Vision 2030

The vision for this agenda is for the Swedish tourism and hospitality industry to, by 2030, become a world leader in developing unique customer experiences, which will contribute to sustainable development.

Long-term goals (2030) focus on world ranking

- . Sweden will have an overall ranking among the top-3 in the World Economic Forum TTCI Index
- . Swedens ranking of the pillar Prioritization in Society from 74 to top 15 in the World Economic Forum TTCI Index

The World Economic Forum has, for the past seven years carried out an in-depth analysis of the sectors competitiveness of economies around the world, the TTCI (The Travel & Tourism Competetiveness Index.) The resulting T&T Competetiveness Report provides a platform for multi-stakeholders dialogue to ensure the development of strong and sustainable sector. Sweden has a high overall ranking (9th) but was overall ranked higher (5th) in the 2011 report. **Alarming in a long term perspective is the rating (74th) the WEF report gives Sweden in the pillar no 5 which rates to which extent the government prioritizes the sector. By making clear that the tourism and hospitality industry is a sector of primary concern, and by reflecting this in the budget priorities, the government can channel needed funds and help to attracting further private investments in the sector to essential development projects for the sector.**

Mid term goals (2020) focus on finances and job creation

- . To reach SEK 200 billion in annual tourism export
- . Generation of 100 000 new jobs in Sweden

Short term effect goals (2016) are connected to the five key recommendations:

- . Well established and prioritized research platform
- . Short term action and long term planning for accessibility
- . Defined plans to secure fulfillment of resource gap and leadership development
- . Close cooperation with The Swedish Agency for Economic and Regional Growth to drive destination development
- . Established eco-system and meeting places
- . Focused governmental and public sector priorities

THE TRAVEL & TOURISM COMPETITIVENESS INDEX*

The TTCI has been developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel & Tourism sector. The TTCI aims to measure the factors and policies that make it attractive to develop the T&T sector in different countries. The theme of the 2013 Report, "Reducing Barriers to Economic Growth and Job Creation," reflects the importance of the sector for this purpose. The TTCI is based on three broad categories of variables that facilitate or drive T&T competitiveness. These categories are summarized into the three subindexes of the Index: (1) the T&T regulatory framework subindex; (2) the T&T business environment and infrastructure subindex; and (3) the T&T human, cultural, and natural resources subindex. The first subindex captures those elements that are policy related and generally under the purview of the government; the second subindex captures elements of the business environment and the "hard" infrastructure of each economy; and the third subindex captures the "softer" human, cultural, and natural elements of each country's resource endowments. Each of these three subindexes is composed in turn by a number of pillars of T&T competitiveness, of which there are 14 in all.

These are:

1. Policy rules and regulations
2. Environmental sustainability
3. Safety and security
4. Health and hygiene
5. Prioritization of Travel & Tourism
6. Air transport infrastructure
7. Ground transport infrastructure
8. Tourism infrastructure
9. ICT infrastructure
10. Price competitiveness in the T&T industry
11. Human resources
12. Affinity for Travel & Tourism
13. Natural resources
14. Cultural resources

Each of the pillars is, in turn, made up of a number of individual variables.

* SOURCE: The Travel & Tourism Competitive Report 2013

BENCHMARK SWITZERLAND*

Switzerland continues to lead the rankings, performing well on almost all aspects of the Index. Switzerland's infrastructure, especially ground transport (3rd), is among the best in the world. The country also boasts top marks for its hotels and other tourism-specific facilities, with excellent staff thanks to the availability of qualified labor to work in the industry (ranked 2nd)—perhaps not surprising in a country that holds many of the world's best hotel management schools. Switzerland also attracts tourists because of its rich and wellmanaged natural resources. A large percentage of the country's land area is protected, environmental regulation is among the most stringent (3rd), and the T&T industry is considered to be developed in a sustainable way (7th). These good environmental conditions, combined with the high safety and security of the country (2nd), contribute to its solid T&T competitiveness. Switzerland is not only a strong leisure tourism destination but also an important business travel hub, with many international fairs and exhibitions held in the country each year, driving its showing on the cultural resources pillar (6th). Switzerland's strong performance in all these areas enables the country to somewhat make up for its lack of price competitiveness (139th), which, together with a fairly restrained international visa policy, does indeed limit the number of arrivals.

* SOURCE: The Travel & Tourism Competitive Report 2013

THE CONTRIBUTION OF THE TOURISM AND HOSPITALITY INDUSTRY TO INNOVATION AND DEVELOPMENT

With new demographic structures and global overutilization of natural resources, new demands for sustainable development are arising. This creates needs and opportunities for new, overriding solutions. In order to create long-term sustainable growth in an ever increasingly complex reality stresses the importance of building bridges between sectors, between different types of skills, between large and small companies and strengthen the linkage between the private and public sectors and to other countries. We must strive to make it attractive and really worthwhile to visit Sweden, to move here with the aim to live and work in the country. We have to realise and unlock the potential of tourism in Sweden. It's a key sector with great possibilities to strengthen Sweden's competitive edge, side by side with other important sectors in our society.

The tourism and hospitality industry, a support for social development

The number of persons employed as a result of tourism was 168 000 on an annual basis in 2012, and the unique factor of the industry is that these employment opportunities are created throughout the country. Tourism turned over SEK 275,5 billion, and the export value, that is to say the value of the consumption by foreign visitors to Sweden, was SEK 106,5 billion in 2012. **The view of Sweden as a modern knowledge society needs to be upgraded to include the tourism and hospitality industry as an important part of the growing service sector.**

The tourism and hospitality industry is also a lever for the development and export of other industries. Cooperation between "new" and "old" industries where we traditionally are strong can increase Sweden's competitive edge and contribute to a sustainable society in the long term.

A growing industry

Since 2000, total tourism consumption in Sweden has increased by more than 83 per cent in current prices. Exports, or the value of the consumption by foreign visitors in Sweden, have increased over the same period by almost 162 per cent, or an average of eight per cent per year in current prices. The proportion of the export value of total tourism consumption has increased since 2000 from around 27 per cent to more than 39 per cent. The largest part of tourism turnover is generated by journeys and transport, which represent one third, followed by lodging and restaurants, which represent around 30 per cent of tourism consumption. At winter destinations, skiing-orientated consumption, for example lift cards, is of course very important. It is in particular consumption within culture, recreation/ nature, sports, restaurants and shopping that has increased over the last ten years. Almost 30 per cent of the SEK 275,5 billion spent by Swedish and foreign leisure and business travellers in Sweden in 2011 was spent within retail, for example shopping and foods.³

Doubled turnover – with increased pace and cooperation

The national strategy for the Swedish tourism and hospitality industry has the goal of achieving tourism turnover of SEK 500 billion by 2020. A stage goal of SEK 350 billion by 2015 was set, based on the current calculation basis in the tourism satellite accounts. Based on the result for 2009, it was found that the long-term trends for the tourism and hospitality industry dating back ten years would be sufficient to achieve, and even to exceed, a turnover

of SEK 500 billion by 2020. The results for tourism turnover during 2010 and 2011 show that the rate of growth has been around five per cent on average over the last ten years. The tourism and hospitality industry in Sweden must increase its pace of expansion in order to realize the goal of a turnover of SEK 500 billion by 2020. An increase in pace requires cooperation between public actors nationally and regionally, and also between companies.

Opportunities and challenges of the sector

The tourism and hospitality industry has great potential and may be a support and motor for social development, not least through regional development, increased employment and exports generated by the industry. However, strategic work and cross-border cooperation is needed in order to develop services and products that are internationally competitive and that can reinforce Sweden as a destination for visitors. The National Strategy for the Swedish Tourism and Hospitality industry from 2010 summarize the opportunities and challenges as follows:

- . Cooperation: How the industry can gain from finding routes for cooperation within the industry and with other Swedish areas of strength.
- . The political arena: The importance of will, coordination and force of action at national, regional and local level in order to create the prerequisites for development.
- . Increased professionalism: How entrepreneurship, innovation, business development and skills issues contribute to the development potential of the tourism and hospitality industry.
- . Utilizing the special characteristics of Sweden: Sparse population, areas of unspoilt nature and environmental thinking, and the fact that Sweden as a country is perceived as calm, safe and secure, which appears exotic in the context of the world around us.

TRENDS AND FUTURE DEMAND

Trends

The global social development that will be impacting on the tourism and hospitality industry up to 2020–2030 can be summarized within the following areas:

- . **Urbanization**
- . **Sustainable development**
- . **Digital development**

Urbanization

Future travel will in particular be driven by travel to, from and between cities. The cities drive growth, both financially and from a population point of view. By 2025, the 600 largest cities are expected to house 25 per cent of the global population. Already in 2009, the world passed the point where more people live in cities than in the countryside, and this trend will be reinforced over the next 10–20 years. Today, 1.5 billion people live in the 600 largest cities.⁴ Also in Sweden, it will primarily be the major cities that attract travel to, from and within Sweden.

Sustainable development

Sweden is ranked No 1 within the key area of sustainable development in the World Economic Forum's report for 2012. It also establishes that Sweden's potential for growth within the area is the fifth best in the world. The tourist of the future will be aware of quality and the environment, and Sweden will be competing with other countries for those tourists who are prepared to pay for a sustainable, unique and environmentally friendly experience. Sweden has plenty of empty and unexploited nature, where there is potential to refine the raw material in a sustainable way in order to create unique and sustainable integrated experiences for visitors. This places demands on knowledge and skills, on the companies' future innovativeness and ability to develop products and services in cooperation with other industries and skills.

Digital development

Digitalization has radically changed the tourism and hospitality industry's prerequisites and business models over the last few years. The opportunity to provide advance information about destinations, present the attractions and products on offer and to carry out sales of products and services has in a short time revolutionized the opportunities to reach new markets and customer segments. When it comes to the use of the Internet in Sweden, four out of the 20 most common activities on the Internet are related to travel. At the same time, many companies in the Swedish tourism and hospitality industry are late adopters. The skills and resources to invest in digital tools is lacking among many of the smaller companies in the industry. Sweden is ranked as a world-leading IT country according to the World Economic Forum, and receives a high mark for educational level, infrastructure and innovation ability among other areas. Here there is potential to link together the tourism and hospitality industry's actors with actors within IT, business and society in order to utilize the opportunities of digitalization to the full in order to find new innovative and cross-border solutions. The potential of making Swedish experiences accessible with the help of the opportunities offered by digitalization can turn Sweden into a pioneer country for sustainable, accessible and internationally competitive integrated experiences for tourists.

Future demand

Future visitors



By 2030, the typical tourist to Sweden will: come from a city, be interested in nature and culture, be digitally mature, be willing and able to spend money, be active, and want to buy something.

The reasons for travelling to and within Sweden will be about Sports, Nature, Meetings and Culture.

International travel

International travel throughout the world passed one billion in 2012 according to UNWTO, and the forecasts indicate that international tourism continues to grow. By 2030, travel is expected to generate around 1.8 billion international arrivals. Tourism development has to date been stronger than economic development in general, but the UNWTO is now indicating that the rate of growth will be lower. Apart from an increasing number of areas around the world approaching a mature economic development stage with lower growth, rising costs of fuel and environmental cost supplements for travellers means a reduced amount of travel as travelling costs rise.⁵ Although the domestic market is Sweden's largest market, the great growth potential for the Swedish tourism and hospitality industry lies in increasing the number of foreign visitors. During 2011, Sweden was visited by 16.7 million persons living in other countries. The foreign visits are currently dominated by our Nordic neighbouring countries: Norway, Denmark and Finland, together with Germany. Visitors from Russia consume the most per person in Sweden.⁶

Health, exercise and competitions

For several years, there has been an on-going trend in society of greatly increased interest in food, exercise and well-being. Exercise and competitions have become an enormous industry. In Sweden, around half a million persons took part in some kind of exercise run during 2011, and competitions attract both Nordic and other international participants. Sweden is already good at arranging sports event, and the development of services and products linked to the health trend will become ever more important.

Nature tourism a strongly increasing trend

Urbanization is reflected in increased nature tourism. The more we live in cities, the more we wish to spend our holidays in nature. Nature tourism is one of the quickest growing segments within tourism today. "Allemansrätten", the public right of access to private land in Sweden,

offers a unique opportunity to move about freely in nature, and we often regard this right as a cultural heritage, and sometimes even as a national symbol. Sweden's unique nature and uniquely large proportion of untouched nature is an important reason for travel. However, Sweden is in general poor at packaging and turning services and experiences linked to nature into products.

Meetings & culture, part of the attractiveness

Meetings in the form of congresses, conferences and similar will be other important reasons for travel both to and within Sweden in the future. Helping those who are active in attracting meetings and conferences to Sweden can therefore be a way of strengthening the work of the tourist industry towards increased turnover. Cultural Sweden annually turns over millions of SEK on events throughout the country, both through ticket income but also through the visitors who travel to attend the events and their consumption in conjunction with their visit. Concerts, theatre, musicals, opera, dance, shows, museums and exhibitions draw visitors to and within Sweden. The same applies for the cultural treasure we have in the form of museums, castles and palaces, ancient monuments and other historical places and attractions.

Sweden is working to become a world leader in the use of digitization opportunities. The Government has presented a national strategy, Digit@it kulturav, in order to make pictures, texts and data more accessible than ever and to make them available to the various potential public and private stakeholders. The centerpiece of the strategy is to facilitate and inspire various stakeholders in society to use, develop and preserve the cultural heritage. The digitization of the cultural heritage is essential for the current and future development of services and offers in the tourism and hospitality industry.

"It is thanks to Stieg Larsson's popular Millennium trilogy and John Ajvide Lindqvist's vampire tale "Let the Right One In" Sweden has been put on the map. This has helped Sweden to get the attention deserved. Many have a picture of the cold, beautiful and a bit scary country."

Lonely Planet's Best in Travel

MAPPING THE ACTORS

THE HUBS

The vision of becoming a world leader in developing unique customer experiences needs to be supported by serious knowledge development and transfer. We suggest support for creating a grid connecting researchers, innovation professionals, the industry and the public bodies “the R&I Grid”. We also suggest increased resources dedicated to research and innovation in the sector. The maps should be seen upon as illustrative, not all actors are included.



The tourism entrance hubs

Ports into Sweden and also areas where 80-90 per cent of the tourism turnover is realized

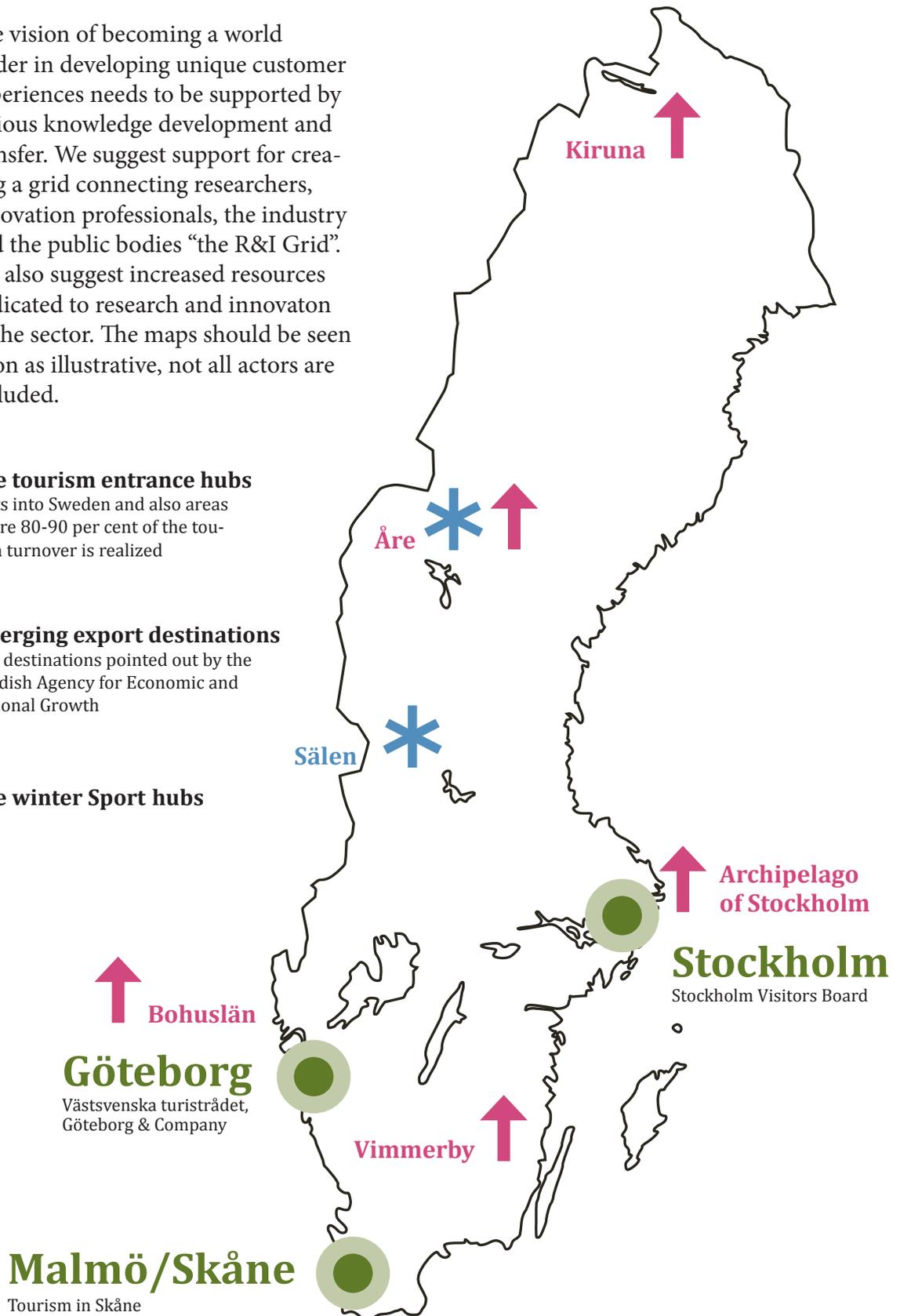


Emerging export destinations

Five destinations pointed out by the Swedish Agency for Economic and Regional Growth



The winter Sport hubs

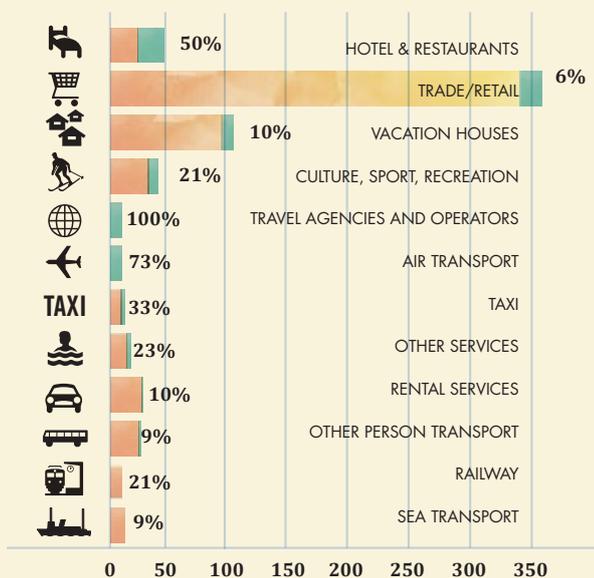


MAPPING THE ACTORS

THE INDUSTRY

TOTAL VALUE ADDED

The total value added* and the part of the value added by tourism in the different sectors of the industry.



* Total value added is equivalent to revenue less outside purchases (of materials and services)

SOURCE: Swedish Agency for Economic and Regional Growth

INDUSTRY ORGANISATIONS

The tourism & hospitality industry is estimated to count for appr. 30 000 companies.

- . **Svensk Turism** (umbrella org for Swedish Tourism)
- . **Visita** (5 000 members)
- . **Swedish Trade Federation** (13 000 members)
- . **The Transport Group** (11 300 members)
- . **SLAO** (235 ski resorts, 40 ski schools, 100 associate members)
- . **STF, The Swedish Tourism Association** (200 000 private members)
- . **Parks & Resorts** (Association of 5 theme parks)
- . **SCR, Swedish Camping**
- . **The Ecotourism Association** (400 members)
- . **RTS, Swedish Travel & Tourism Association** (200 members)

OTHER SECTOR ORGANISATIONS

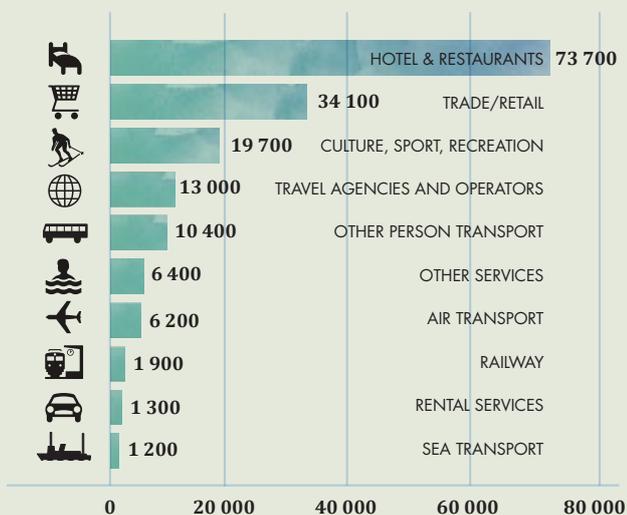
- . **The Swedish Sports Confederation** (70 member federations)
- . **Swedish Festivals** (27 festivals)
- . **The Association of Swedish Museums** (200 member museums)

THE EMPLOYEE'S UNIONS

- . **HRF, the Hotel & Restaurant Union** (33 000 members)
- . **The Commercial Employees' Union** (150 000 members)
- . **The Swedish Transport Workers Union** (63 000 members)

EMPLOYEES RELATED TO TOURISM

Number of persons with work related to tourism in the different sectors of the tourism & hospitality industry (persons, averages)



SOURCE: Swedish Agency for Economic and Regional Growth

THE PUBLIC BODIES

Since 2010 the Swedish government has appointed 15 agencies and state-owned companies to form a strategic authority group for issues in the tourism and hospitality industry. The aim is to introduce a higher level of collaboration and effectiveness in operations related to tourism.

Swedish Agency for Economic and Regional Growth leads the work in collaboration with **Visit Sweden**. The other relevant authorities are:

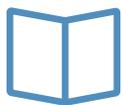
- . **the Swedish Public Employment Service**
- . **Business Sweden**
- . **the Swedish Property Board**
- . **the Board of Agriculture**
- . **the Swedish Environmental Protection Agency**
- . **the Swedish National Heritage Board**
- . **Swedish Maritime Administration**
- . **Swedish Forest Agency**
- . **Swedavia**
- . **the Swedish Transport Administration**
- . **The Swedish Transport Agency**
- . **Swedish Agency for Growth Policy**
- . **VINNOVA - Swedish Governmental Agency for Innovation Systems**

MAPPING THE ACTORS

THE RESEARCH & INNOVATION GRID

Actors in Academia, research and innovation

Tourism and hospitality industry is spread across the country, in view of this and the main challenge regarding the future demand for the skilled labor, and the fact that the sector challenges are multidisciplinary in nature, makes it important to involve institutions with different strengths and with distribution across Sweden. Participants from academia, who so far have stated their interest in joining the R&I Grid are:



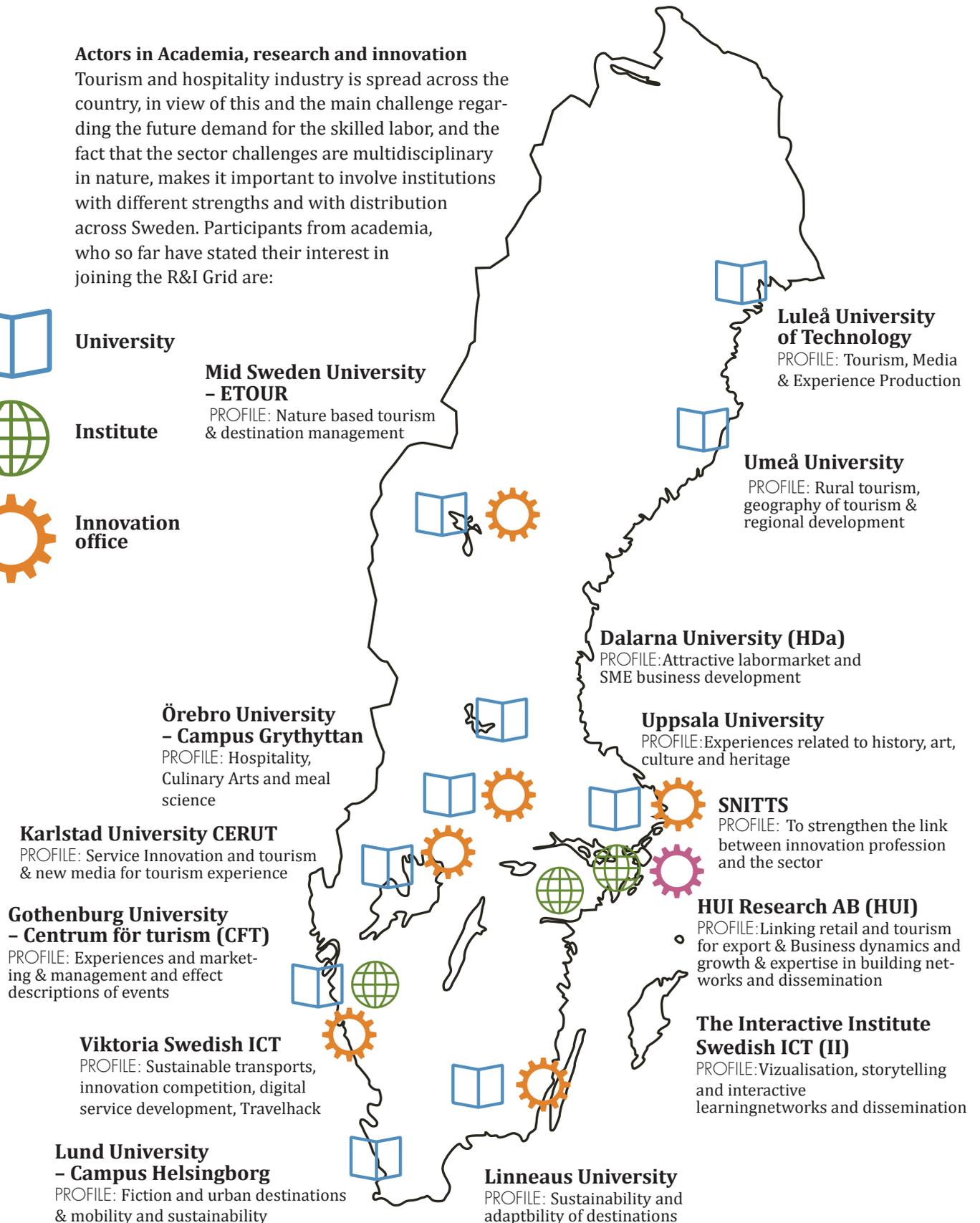
University



Institute



Innovation office



INNOVATION AND RESEARCH IN THE SECTOR

An industry developing in the shadow of the innovation support system

It is clear that the tourism and hospitality industry takes part of the national resources invested in innovation environments only to a very limited extent. It seems quite difficult to get representatives for the innovation support system to participate in dialogue about the tourism and hospitality sector. The Swedish Incubators & Science Parks (SISP) which has 65 members who operate around 80 innovation environments with more than 5,000 incubator companies around the country is another example. The focus of the SISP's investments is mainly on knowledge-based and growth-orientated companies. Very few of these innovation environments have links to the tourism and hospitality industry. These are signals that the tourism and hospitality industry, despite its growth potential and raising image as a future key industry and interesting market worldwide, stands in the shadow of the interest of the established, traditional Swedish support system. This indicates that **the support system needs to shape up and increase its understanding of the specific needs and prerequisites of the tourism and hospitality sector.**

Many SMEs

The overall experience of a visitor is built up from a mixture of services and products delivered by a number of both large and small suppliers. Within the framework for a destination and tourism offerings, there is a strong mutual interdependence between companies, both large and small. The tourism and hospitality industry consists of many very small and small entrepreneurs, with limited resources – in terms of both time and money. In order to increase the rate of growth, it is therefore important to create innovation support systems that presents better conditions for the companies themselves to grow, to attract capital investments.

A co-working system for delivery

But it is not a universal solution to concentrate solely on strengthening the link between the SME in the sector and the innovation system. The usual picture of competitiveness as something that is primarily created in companies need, when it comes to tourism, to be supplemented with another decisive factor. This consists mainly of the attractiveness of the location or activity which in interaction with companies is the key factor for success. It is the sum of the factors that characterizes the location or activity, for instance nature and culture, events, hosting, physical environment, infrastructure, etc., that creates attraction. To create competitiveness is therefore the development of cooperation between many different actors. In the case of tourism, it is not just companies but also public actors who has a much more important and decisive role than in many other sectors of the economy.

The regional innovation system

All regions in Sweden have some kind of more or less developed strategy for their innovation system. Some regions, such as Stockholm, Västra Götaland, Jämtland, Dalarna and Skåne, have formulated regional strategies for the tourism and hospitality industry, also in relation to the existing support system. In these regions, the tourism and hospitality industry is also starting to be more integrated into the innovation system in practice. Gävleborg County has in recent years been working out strategies for the “experience industry” (collective name for the tourism and hospitality industry and the cultural and creative industries), and also works on how to adapt the support system for companies within this area.

A young research discipline

Research linked to tourism and the tourism and hospitality industry is in progress at a number of universities in Sweden. Tourism research and research aimed at the tourism and hospitality industry are still to be regarded as young disciplines, of a multi-disciplinary nature. The picture of the current research within the tourism and hospitality industry is not uniform among representatives in academia. When we interviewed representatives from the industry, this picture becomes even more fragmented. During 2012, the Swedish Agency for Growth Policy Analysis produced two reports, Kartläggning av turismforskningsmiljöer i Sverige⁷ (“Mapping Tourism Research Environments in Sweden”) and Turismens betydelse⁸ (“The Importance of Tourism”). At the beginning of 2013, the R&D fund for Swedish Tourism and Hospitality Industry made a search⁹ of all universities and major research financing bodies in order to get a picture of the research within the area that had been carried out in 2012, and the external financing bodies that had contributed to this research. More than 60 research projects concerning the tourism and hospitality industry were carried out in 2012, and they are distributed across a number of universities and colleges within the country.

The important research environments in Sweden are ETOUR at Mid Sweden University, the Department of Cultural Geography at Umeå University, the Centre for Tourism at the School of Business Economics and Law at Gothenburg University, Tourism Studies at Dalarna University and the Department of Service Management at Lund University. All those listed above gather together research councils and a number of projects within tourism research in progress. It is also they who primarily use external research funds from national actors, such as the Swedish Environmental Protection Agency (SEPA), the Swedish Foundation for Strategic Environmental Research (Mistra), the Swedish Research Council Formas and the European Union’s Interreg initiative.

Research with links to tourism is also carried out at Linnaeus University, Luleå University of Technology, University of Kalmar and research is also in progress at Karlstad University. At Örebro University, Campus Grythyttan, research linked to Culinary Arts and meals is in progress. At Linköping University/Theme Q, there is research into creative locations.

A small portion of national research support

A review of the websites of the universities and research financing bodies shows that the major national research financing bodies contributed around SEK 30 million during 2012 in support of research relating to the field of tourism and hospitality industry.

The support was distributed as follows from the financing bodies:

Formas	SEK 2.4 million
Mistra	SEK 6.4 million
the Knowledge Foundation	SEK 2 million
SEPA	SEK 5.7 million
Vinnova	SEK 9 million
the Swedish Research Council	SEK 2.1 million
the Swedish Foundation for Strategic Research	SEK 0.64 million
Riksbankens Jubileumsfond	(2 minor projects, no amount stated)

The majority of the research (more than 60 projects) in progress appears to be financed by university funds supplemented by funds from private and regional financing bodies. In addition to the national research financing bodies, some research certainly is financed via structural funds.

The industry's support of research

BFUF (the R&D Fund of the Swedish Tourism & Hospitality Industry) – is the Swedish hospitality sector's own tool for research and innovation. The aim of BFUF is to promote scientific research and innovation within the hospitality sector and employ a long-term approach to engage the best and most highly qualified researchers to study the hospitality sector. Through BFUF, companies working in the hospitality sector annually contribute around SEK 8 million to research and development projects. In 2012 BFUF decided upon SEK 7 million in support of scientific research. BFUF is established jointly by Visita and the Hotel and Restaurant Workers' Union.

Actors in Research and Innovation



Mid Sweden university – ETOUR

Profile: Nature based tourism & destination management

ETOUR conducts “state-of-the-art” research in the multidisciplinary field of tourism, focusing on issues associated with destination development. ETOUR specializes in four areas of research: (a) nature based tourism; (b) E-tourism research for developing, marketing, and managing tourism destinations; (c) tourism's economic, political, and spatial dynamics; and (d) destinations (pop culture tourism, event design and management, regional development, wind power, peak experiences, trends in tourism, food tourism). These four research areas tend to draw from the sustainability and destination development paradigms. Also, ETOUR's approach to working with stakeholders to co-create and utilize scientific knowledge is a significant profile of research at ETOUR.



Gothenburg University - Centrum för turism (CFT)

Profile: Experiences and marketing & management and effect descriptions of events

CFT conducts research in tourism in profiled theoretical areas. These include: experiences and marketing, and effect descriptions of tourism ventures. These theoretical perspectives highlights different changing empirical fields such as cultural tourism, events, maritime tourism and hotels and restaurants. The aim of the research is to make theoretical contributions to the empirical field as well as practical contributions that can lead to innovations in businesses and/or support policy development and regulations the public sector. In recent years maritime tourism has become an CTF area of profile. The research project Future Coasts (FTK) in Bohuslän is one example where research have contributed to the creation of sustainable tourism innovations and influenced political decisions positively. The project was awarded Gothenburg University's collaboration price. FTK also links to the ambition of making Bohuslän an export mature destination. Employees at CFT is also part of a strategic focus on maritime clusters at the University of Gothenburg. These efforts are linked to VINNOVA Agenda " Svallvåg - Swedish maritime research and innovation agenda "



Umeå University

Profile: Rural tourism, geography of tourism & regional development

Umeå University has a large number of doctoral degrees in various touristic themes awarded on topics cultural geography, economics and business. Today's research in tourism, is particularly found in the Department of Social and Economic Geography and the Restaurant School. Tourism Research at Umeå University, sees tourism especially as a spatial phenomena and therefore best characterized as geography of tourism. This means that issues relating to tourism - and destination development and their links to regional development are central to the research. Expertise is provided in the following areas; rural and regional develop-

ment/community development, tourism in peripheral areas, rural tourism, nature tourism, holiday tourism, land use conflicts linked to tourism, tourism, labor, provision of knowledge in tourism, culture and tourism development, Sami tourism, food and tourism, hospitality and gastronomy. Although Umeå tourism research has a major methodological breadth the research especially based on large data sets is rather unique. The research environment combines international collaboration with a regional commitment to the Nordic and especially northern conditions.



Dalarna University (HDa)

Profile: Attractive labor market and SME business development

HDa has a strong research in the sector and a long history of tourism training and development projects both regionally and internationally. HDa's history of being an active participant in the regional innovation in the hospitality industry is a consequence of the industry's importance in the region. The research environment is multidisciplinary comprising subjects as tourism studies, cultural geography, economics and business, but also supportive competencies in work science, computer engineering, informatics and statistics. HDa profile areas for research are: a) Attractive labor market - talent strategies, seasonal challenges, youth mobility and career paths as well as the attractiveness of the tourism industry businesses. b) Export Maturity and business development - training and expertise in international sales and exports, exports of maturity analysis, business models for small and medium businesses, destination development through strategic networking. c) Development and evaluation of major events - Management and development of events, sponsorships, marketing, networking, economic impact analyzes, links to destination development. d) Sustainable internationalized destination development in the mountains and remote areas, (international) transport, mobility and social sustainability. Moreover HDa has significant expertise that can contribute to the SIO program such as transport and traffic data, economic data and retail data and registers based socio-economic and labour market data and related methodological competence.



Uppsala University

Profile: Experiences related to history, art, culture and heritage

The university offers a wide range in both research and education conducted in all three disciplines of; science and technology, medicine and pharmacy, social sciences and the humanities. In the latter field, Uppsala University has Sweden's most complete research with a unique range that is successful, both nationally and internationally. On 1 July 2013 Gotland University was incorporated with Uppsala University. The island of Gotland holds a strong national brand in terms of tourism and hospitality. A number of research groups at Uppsala University have expressed their willingness and intention to develop their research and collaborate in order to support the development of tourism industry in Sweden. The agreement is to bring together the Uppsala University research in the history, economic history, literature and cultural heritage with the strong research in the areas of human-computer interaction, ubiquitous games and game development related to information systems, computer science, and media - and communication. With the merger of Gotland plans have advanced well for a Tourism education at Uppsala University, Campus Gotland. By pooling existing research resources, UU can create excellent ability to develop customer experience in the hospitality industry in Sweden related to history, art, culture and heritage, thereby contributing to the knowledge development in regards to product and service innovation and digitalization.



Örebro University

Profile: Hospitality, Culinary Arts and meal science

Culinary arts and meal science has an interdisciplinary approach and operationalized through the Five Aspects Meal Model (FAMM). FAMM integrates the main elements of the meal experience and provides a strong framework for teaching and research in the foodservice field at the department. Research areas such as sensory science, public health, ethnology, and consumer research and tourism management are important for the discipline. A strategy

for the research is to have a holistic view, which has resulted in several projects dealing with customer meal experience at restaurants seen from a customer point of view. Experience on culinary aspects of food and meals and the importance for health combined with customers' sensory perception have received attention in the societal debate and research. Sensory analysis contributes to understand human behavior around food and the development of products and meals. Another perspective of the research is the social and cultural aspects of the meal linked to gender, ethnicity and social relationships.



Karlstad University – CERUT

Profile: Service Innovation and tourism & new media for tourism experience

Research at Karlstad University focusses the hospitality industry from several angles and subjects (human geography, sociology, media communication and business management) The CTF, Service Research Center, is strong in terms of research on innovation and services. The university has a tradition in research of trend -oriented tourism niches and how places and regions trademark can be charged with identity. Further, research is conducted related to tourism linked to cultural and creative industries (CCI) with a strong emphasis on what is contained within the concept of cultural economy. Our proximity to Norway has lead to a strong profile is cross-border issues related to tourism: the effects of cross-border trade, the various forms of mobility are interwoven and how networks and partnerships across the border are important prerequisites for the development of tourism. Through our proximity to Lake Vänern, our research with a focus on how climate change can provide an incentive for innovation in tourism. Some research focus on labor and employment in the tourism industry, which among others include gender perspectives on business and entrepreneurship and seasonal demand. Based on national and international perspective, we want to especially highlight the uniqueness of our recent research focus on Spaces, Mobilities in a Mediatized World, that is a strong link between tourism, culture, geography, and media and communication studies.



Lund University – Campus Helsingborg

Profile: Fiction and urban destinations & mobility and sustainability

The Department of Service Management and Service Science have research mainly based in the three themes; 1) destination development, 2) experiences and 3) sustainability. Research projects cover; how mobility affects the climate, air traffic impact on destination development, film tourism for a destination, and how the cultural heritage may be used as development potential. Moreover the research also cover pop culture, experiences and mobility. Mobility can be associated with movements in different geographic levels, but also with more general issues associated with transportation. Several research projects includes issues on innovation - in terms of innovation in the tourism sector as well as methodological reflections on how to collect tourism-related data. It may be added that several projects collect empirical data in urban areas. This is a result of the Department operates in a cross-border urban area near Copenhagen and Malmö. Tourism Research is also found at the universities Department of Cultural Sciences. Cultural analysis of the role of tourism in the contemporary experience economy and the historical development of tourism have been published by several researchers. Current projects research on the culinary tourism development. The program has a multi-year collaboration with Malmö Tourism which has resulted in several applied projects. It has also been involved in several projects aiming to develop the experience economy in Denmark and Sweden.



Linnaeus University

Profile: Sustainability and adaptability of destinations

At Linnaeus university tourism studies is an established main area for bachelor as well as research studies. Tourism Research at Linnaeus University has strong links to different aspects of sustainability of tourism, events, culture and regional development. To develop the visitors experience require a greater knowledge of tourism/destination system's composition, adaptability and functionality. The ability of destinations to adjust supply to changes in demand (due to weather, exchange rates , etc.) is critical to the customer experience and thus

the tourists' propensity to re-visit a destination. Linnaeus University's scientists involved in research that addresses these issues. Moreover there is high expertise on local culture, food and durability and very high expertise in areas such as tourism, climate change and sustainable development.



HUI Research AB (HUI)

Profile: Linking retail and tourism for export & Business dynamics and growth

HUI Research has two branches a) consultancy - and b) research. This is unique and present means for research activities in close collaboration with the trade, tourism and hospitality industries. The research department is the leading interdisciplinary research environment in trade/retail research. Since the merger in 2010 with the Tourism Research Institute (TUI) research is also focussing on issues of importance to the tourism and hospitality industry. HUI's research has focused on structural change in the retail sector and business growth. A line of research may as well be important to strengthen the tourism and hospitality industry. HUI areas of strength are: (a) The link between trade and tourism. The goal is to double the tourism export sector within the next ten years. To achieve this goal, the Swedish retail sector is of great importance since it is most export consumption is realized here. HUI's extensive experience in commercial research can help shed light on synergies between trade and tourism. (b) Business Development in the hospitality industry. The sector goals includes creation of 70,000 new jobs. This goal requires more fast growing companies. One challenge is few fast growing companies in Sweden as well as the fact the majority of companies do not choose to hire new employees. HUI is a world leader in research that focuses on business dynamics and growth. Besides it's own research HUI Research has the goal to be the partner of choice when it comes to research in the sectors trade, tourism and hospitality. HUI offers access to good databases, an extensive research network, partnerships with academic institutions, as well as good business- and media contacts. HUI can assist the National R&I Grid with long expertise in building networks, establish databases and disseminate research to a wider public.



The Interactive Institute Swedish ICT (II)

Profile: Visualization, storytelling and interactive learning

The II vitalize storytelling and bring history, towns, places and objects to life for richer user experiences. By focussing on user needs and design, II create cool tools and services that enhance understanding, knowledge and engagement – and on top of it, they are fun! Since 1998 the II innovations have gained international praise, with an impressive trackrecord of exhibition, awards and commercialisations. Strong areas of expertise are gaming, cultural heritage, sustainability, sound design, extreme environments, internet of sports, interactive learning and visualization. II work closely with partners in society, private enterprises, public sector and academy.



Viktoria Swedish ICT

Profile: Sustainable transports, innovation competition, digital service development, Travelhack
Viktoria Swedish ICT provide research results and IT applications that are distributed rapidly, come to practical use and contribute to sustainable development of products, services, business and companies. By working closely with industry partners, Viktoria Swedish ICT develops user oriented, innovative services. Viktoria Swedish ICT often play the role as supplier of specifications as well as inspirational source to the companies developing platforms and services. In this way, Viktoria will provide a neutral arena for experimenting with and negotiating innovative solutions. The transport competence area covers applied research with industry actors targeting IT applications that support transportation practices.



Fyrklöver Innovation office

Fyrklöver is one of twelve innovation offices connected to Swedish universities. The office is a unique platform for interregional cooperation between Karlstad University, Linnaeus University, Mid Sweden University and Örebro University. Through its activities, Fyrklöver contribute to an innovation and knowledge-driven sustainable growth. Fyrklöver represents a

network-based collaboration where the innovation support activities developed jointly and often remotely with flexible working practices. The aim is to stimulate an increased flow of ideas. The Innovation Office Fyrklöverns expertise is in terms of innovation advisors and innovation coordinators. As the four connected universities all have stated interest to join the suggested Tourism & Hospitality Research and Innovation Grid the idea of connecting Fyrklövern becomes natural.



Uppsala University Innovation (UUI)

In many ways UUI is a pioneer in the field of collaboration among innovation offices at universities and colleges in Sweden. To a large extent UUI act facilitator and create relevant meeting formats. UUI has the goal to develop cooperation between tourism related research at Uppsala University and the hospitality industry. Uppsala city work since over a year, and in close collaboration with the university and industry sectors with four cluster initiatives, tourism industry and ICT are included in two of these cluster initiatives. They have entered into a long term partnership with Telia Sonera in order to develop a local test bed which will create great opportunities to involve citizens and visitors in the design of tomorrow's digital and mobile services, for sectors such as tourism and hospitality. In Uppsala ICT clusters there are as well several ICT companies internationally active in the game development industry who are willing to collaborate with the university to develop new innovative services in the hospitality sector. The ambition is that the quality of both the research and the customer experience is enhanced by a long-term collaboration between researchers in the humanities, ICT and players in the hospitality industry and the ICT industry.



SNITTS:

Profile: To strengthen the link between innovation profession and the sector

SNITTS is Sweden's industry association for individuals and organizations involved in knowledge exchange and utilization of research. SNITTS members are scattered throughout the Swedish innovation support system; within academia, institutes, industry and the public sector. SNITTS purpose is to increase the efficiency of the system by providing a national platform for the identification of actors and activities, sharing of processes and methods and skills. By SNITTS study tours and international partnerships offer members a broader outlook for a more competitive Sweden. Stimulation of national growth requires an innovation support system that creates value by effectively translating knowledge to good use. This is done through various forms of interaction between actors in the system. In order to succeed, it is crucial that individuals of the innovation system are skilled professionals. The idea of connecting SNITTS to the tourism & Hospitality R&I Grid is to complete the connection of researchers, business and public authorities with the profession of innovation. A way of creating linkage between innovation offices and innovation professionals with a sector which until now had it's position in the shadow of the innovation support system.

SIX KNOWLEDGE AREAS OF PRIORITY

Which areas do the companies in the tourism and hospitality industry and the public sector need to concentrate on in order to develop, reinforce and disseminate skills to create the best innovative ability and to utilize the opportunities and meet the challenges that Sweden is facing? How can the Swedish tourism and hospitality industry, in a country with a large land area, nine million inhabitants, darkness and cold and not least against the background of having a tradition of heavy industry, be amongst the 3 world best in regards to developing and offering unique customer experiences that contribute to a sustainable society? The following areas have been highlighted as important for knowledge development during the agenda process.



Customer and market focus

How is the tourism and hospitality industry increasing the knowledge about existing and potential customers, who they are, and what their dreams, wishes and needs are. For example, if Asian or South American tourists are to be tempted to come to Sweden on a larger scale than today, we need more knowledge about what they regard as unique tourism experiences in Sweden and the Nordic countries, as well as what they regard as self-evident factors in the tourism experience. Market knowledge is demanded both by the public sector and the hospitality industry and companies. Up-to-date information is needed, as is good documentation in order to create increased commitment and understanding of the drivers of tourism. Facts can facilitate and justify planned initiatives and investments in the industry, as well as raise awareness about the sector and strengthen its status and image. The tourism statistics that exist need to be developed and supplemented. Measuring methods and sector statistics need to be developed.

Service/product innovation, service design and user-driven innovation

The development of services differs crucially from the traditional models developed to describe technical innovations. New ranges of products are, for example, difficult to modify

once manufacturing and distribution has started, and innovations developed within manufacturing companies are only launched once they have been optimized. Innovative service companies, on the other hand, often use the news value of new services, capture an early market, and, following the launch, the service innovations are usually developed in close cooperation with the customers. Research indicates that innovative service companies often create networks with other innovative actors, in order together to drive the development of complex innovations. The agenda for service innovation includes customer innovation, process innovation, business innovation and market development innovation, which can be directly linked to the development needs of the tourism and hospitality industry. The innovative ability in the industry can be significantly reinforced through knowledge and skills in user-driven innovation and a developed discussion about participant culture, and in this way develop products and services in close cooperation between users, companies and the public sector. Development and investments in the tourism and hospitality industry have to date often been carried out with the focus on construction and real estate, but an increasing number are seeing the necessity of investing in a sustainable qualitative content, which constitutes the complexity that creates an attractive integrated experience for the visitor. It is about involving service design earlier and more clearly in the development of experiences, companies and destinations, and developing and disseminating knowledge within the industry about Open Innovation, for example by bringing challenges related to the tourism and hospitality industry more clearly to existing Living Lab environments.

Digitalization and visualization

Infrastructure includes digital means of communication and visualization. The Government's digital agenda for Sweden has the objective that "Sweden shall be the world leader in utilizing the opportunities of digitalization". As a nation, Sweden is near the top as user and developer of ICT, in general also among small and medium-sized companies. The companies' ability to utilize the opportunities of digitalization is fundamental for their ability to innovate. Here there is development potential among the companies in the tourism and hospitality industry, as their competence and resources for investing in digital tools is not always high. Meetings between Swedish IT companies and the customers and companies of the tourism and hospitality industry are a strategic way of reinforcing the development of products, services and value for all involved. For example, cultural environments can be made accessible and visualized with the help of digital technology. In a larger perspective, the opportunities of digitalization can create platforms that facilitate cooperation between companies in the tourism and hospitality industry and suppliers of digital solutions to create unique customer experiences. Creating offerings based on the entire customer journey requires cooperation, development of new business models and strategic business attitudes to intangible assets of companies, public operations and charitable organizations.



Sustainable tourism

Sustainability is an integral part of any part of the Agenda and the recommended five key initiatives. Transport and accessibility to Swedish attractions and experiences is crucial, for the tourism and hospitality industry and its actors, and environmental impact is becoming an ever more important issue for tourism today. The sustainability concept also includes social sustainability and economic sustainability. Sweden will be competing with other countries for those tourists who are prepared to pay for a sustainable experience. Any development must chime with the requirements of the environment, of reduced emissions and of social development. This places demands on knowledge and competence, and that meetings can be created between the needs of the tourism and hospitality industry and those who have the knowledge and competence. The tourism and hospitality industry should be part of the development of environmentally smart alternatives. The tourism and hospitality industry can also with advantage function as a test bed for the development of environmentally smart products, services and processes.

Infrastructure, logistics and transport

An attractive country to visit is a country with high accessibility, which requires good infrastructure and efficient transport. The time needed for travel, if it is a direct flight, train or boat or if changes are required will be part of the how attractive a destination is rated. The fact that Sweden is one of largest countries in Europe terms of surface, and also sparsely populated is a challenge for all transport infrastructure. But increased tourism is maybe the only future opportunity when the local population is not base enough for investments in infrastructure and transport. In sparsely populated areas of the country, tourism can many times be the single growing sector of industry, and the availability of good infrastructure is crucial for businesses. One challenge is that questions of transport related to the tourism and hospitality industry almost exclusively focus transport of persons. However the businesses at the destinations - hotels, restaurants, shops and others also rely on efficient logistics in supply chain management and waste management. These transports are crucial to the businesses but they are not highlighted in the national tourism statistics. The sectors expansion possibilities are threatened by the fact that transport needs related to tourism and hospitality industry is highly underestimated in the infrastructure plans. This is why the strategy in the Vision 2020 now is supplemented with a seventh strategy, that of infrastructure. There's need for knowledge, analysis and innovations in this field.

Policy development and cooperation between the private and public sectors

There is a lack of analysis and progressive development of policy regulations and initiatives from a tourism perspective. Policy areas as enterprise, environment, agriculture, transport, energy, etc. contain many regulations that are more or less suitable for the tourism sector which in itself often has a marginal role in each area. Examples are the new national transport plan, the food hygiene requirements and nature tourism's ability to live up to them. But even national environment objectives such as a grand quiet mountain setting may conflict with winter tourism needs to use snowmobiles and helicopters. In many cases, it is necessary to cooperate locally, regionally and internationally, and across sector borders, in order to be part of an attractive destination or experience. Knowledge about how to develop and optimize this cooperation in order to create competitive offerings and at the same time sustainable business models is important. The tourist offering is normally a mixture of services and products from both private actors and the state and municipality. The role of the public sector and functional cooperation between public and private actors in the development of knowledge, skills, innovations systems as well as direct products and services is important.

FIVE RECOMMENDED KEY INITIATIVES

The five recommended key initiatives - five steps for innovation.



RESEARCH

The recommendation is to promote and support a grid connecting researchers, innovation professionals and industry. We recommend the creation of a national research school for targeted and coordinated education and training of doctorate students and post - doctorates. In addition to coordination and collaboration requirements there is a need to establish a much more favorable Swedish research environment. This means increased targeted funding to conduct research and innovation in selected areas in the hospitality industry. Today there is a national network of universities in Sweden who offer tourism education, named NATU. Representatives of the various institutions involved in the network meets once a year to discuss educational questions. This is valuable as a quality instrument for the further development of Swedish tourism education. There's also a Nordic research network in Tourism, Northors, with a well-functioning communication and publication platform. A similar Swedish network is missing. There is a need to create a forum for Swedish tourism and hospitality research to stimulate research, communication, knowledge sharing and knowledge transfer. The aim is to invite tourism sector researchers but also researchers in other scientific areas of interest i. e. ICT, logistics, sustainability, organisation, leadership etcetera. Such a platform will also have beneficial effects for development of education and leadership training in the hospitality industry. There is clearly a lack of connection to the tourism and hospitality industry amongst innovation professionals. The aim of linking relevant innovation offices, organisations and individuals to the Tourism & Hospitality Research and creating the R&I Grid is to reduce this

gap. Being part of the grid also permits knowledge sharing between the innovation professionals in regards to innovation models and challenges in the sector.

A national platform and a research school will embody the Swedish research and offer a forum for international collaboration, a base for invitation of foreign lecturers and graduate students to Sweden. Ultimately, there are opportunities for a Swedish research network to offer customized training (in the form of eg MBA, executive education) for parts of the business and future leaders in the hospitality industry. Existing structures and future initiatives described as above have the opportunity to give Swedish tourism industry a strong foundation in the form of world-leading research, which is a prerequisite for achieving the established goal of doubling tourism exports and create destinations which are mature for export in Sweden.

COMPETENCE

The tourism and hospitality industry is moving towards a future of growth, continued high urbanization and demanding customers with increasingly diverse needs. This will increase competition for the most skilled employees. The industry has a long tradition of high staff turnover and short-termism in HR strategy, which could become a serious problem as the industry grows. To find, cultivate and maintain excellence will become the key issue over the next ten years. Employers are demanding timeless skills and business acumen, leadership, versatility, sales techniques and customer service, but in the light of external trends the need for new profiled skills is emerging. An increase in global travel demand requires cross-cultural interpersonal skills and keen language abilities. Digital tools, booking and payment systems impose new requirements on technical competence whereas other knowledge becomes less important. The image of becoming a key industry of the future hopefully leads to an increase in status linked to an increase in quality. The tourism and hospitality sector needs to become more attractive to people other than those who choose the industry as a lifestyle. It needs to be regarded as a long term job option, otherwise skilled staff will be lost in the long run. The way to attract these, are **clearer career paths where experience, education, skills and perseverance are valued** and provides real rewards.

The expected growth, the next generation workforce and an increase in quality and complexity calls for new requirements of the leadership of tomorrow. It will demand a larger amount of skilled leaders and more professionals with the competence to grasp the complex ecosystem of tourism and hospitality management. These skilled professionals will be needed within the national public actors, as well as in the regional system and within the major actors in the industry. The next generation leader skills must be developed and implemented in close cooperation between the academy and the industry.

ACCESSIBILITY

The accessibility challenge is about a) how tourists find and identify Sweden as their goal for the journey (digital accessibility), and b) how easy it is to travel to and within Sweden. The most common way for tourists to travel to Sweden is by boat. A majority of visitors arrive by air. It is very important that the Swedish ferry ports as well as our international airports are interconnected with land infrastructure so tourists seamlessly can continue their journey by car, train or bus. The Transport Administration has 2013 proposed a national plan for the transport.¹⁰ Unfortunately the existing plan lacks an analysis of the infrastructure investments would come the growing hospitality industry to benefit. The needs and challenges related to the hospitality industry requires a thorough review and analysis. A suggestion is that the responsible authorities and the industry, both nationally and regional, have dialogue about how the hospitality industry can be incorporated in the national action plan. This is a prerequisite if the doubling goal for 2020 is to be achieved.

Mobile coverage is a challenge in many places in Sweden. Poor mobile phone reception in the mountains not only affects the ability to make calls. It also makes payment a challenge when it sometimes is impossible to charge credit cards.

DESTINATION DEVELOPMENT

Sweden has large assets in its cities, culture, nature and people – the capability to build interesting products/offers based on this need significant improvements. Destinations – as a concept – are perhaps the most foundational elements in any tourism system. Consequently, understanding destination development processes include issues of consumer behaviour, entrepreneurship and innovation, economic output, governance, hospitality, seasonality, labour issues, natural and cultural resources, management, regional development, service delivery and quality, planning, sustainability, and travel. The National Agency for Economic and Regional Growth is well focused on this through the appointment of emerging export destinations, but a broader and deeper focus is needed. From a national point of view the Theme presents a natural development perspective where research, competence and innovation is needed. The theme can be in terms of activities and reasons for travel; family winter sports, food travel, golf, fishing, fiction tourism etcetera.

There lies a great potential to develop products and services through skills within aesthetics, sensory and cultural heritage in the interface between areas such as transport, hotels and restaurants, trade, culture, art, creative industries, events and sports. Innovation often occurs in the form of hybrid companies, where, for example, design, architecture, restaurant services, music, sports, digitalization and fashion work together. The tourism and hospitality industry can offer companies from other sectors access to new markets, businesses and business models. In the larger perspective, Stockholm, Gothenburg and Malmö and also the other Nordic major cities are too small and peripheral to stand up to international competition. None of these cities are among the 600 largest cities in the world. In order to strengthen Sweden's position from an international perspective, rather than seeing our Nordic neighbours as competitors, we should instead evaluate what Nordic cooperation could offer.

PLATFORM FOR COOPERATION

There is a need of strengthening the interface between the actors in business, academia and the public sector and strengthen the research and innovation structure and to promote consciousness about the sector. This recommendation is to build a platform with the role of holding the focus, prioritise among research and innovation actions and to become the forum for cooperation. It is clear that different models of collaboration and implementation of innovation must be tested. The platform is suggested to:

- . Promote a national overall view of the use and purpose of the tourism and hospitality industry as a key industry in a modern society; an industry that co-exists and interacts with other sectors.
- . Strengthen research within and about the tourism and hospitality industry.
- . Be a node for collection, development and dissemination of knowledge, competence and research that supports the development of the tourism and hospitality industry.
- . Strengthen the links in the knowledge triangle – between research, education and innovation in the tourism and hospitality industry.
- . Strengthen the links to GD Research & Innovation at the European Commission, to UNWTO.
- . Influence the formulation of national and European calls for research and innovation funding, to include the sector and its key areas.
- . Make efforts to include the tourism and hospitality industry more strongly in the regional and national innovation systems.
- . Engage and bring together public actors, business and academia nationally and internationally in common meeting places, forums and private/public projects.
- . Stimulate and support service innovation and business development and measure the concrete results of inputs in the long term.
- . Set up a multi-disciplinary innovation/sector research council linking together skills and research from different industries in order to drive test arenas and pilot projects.

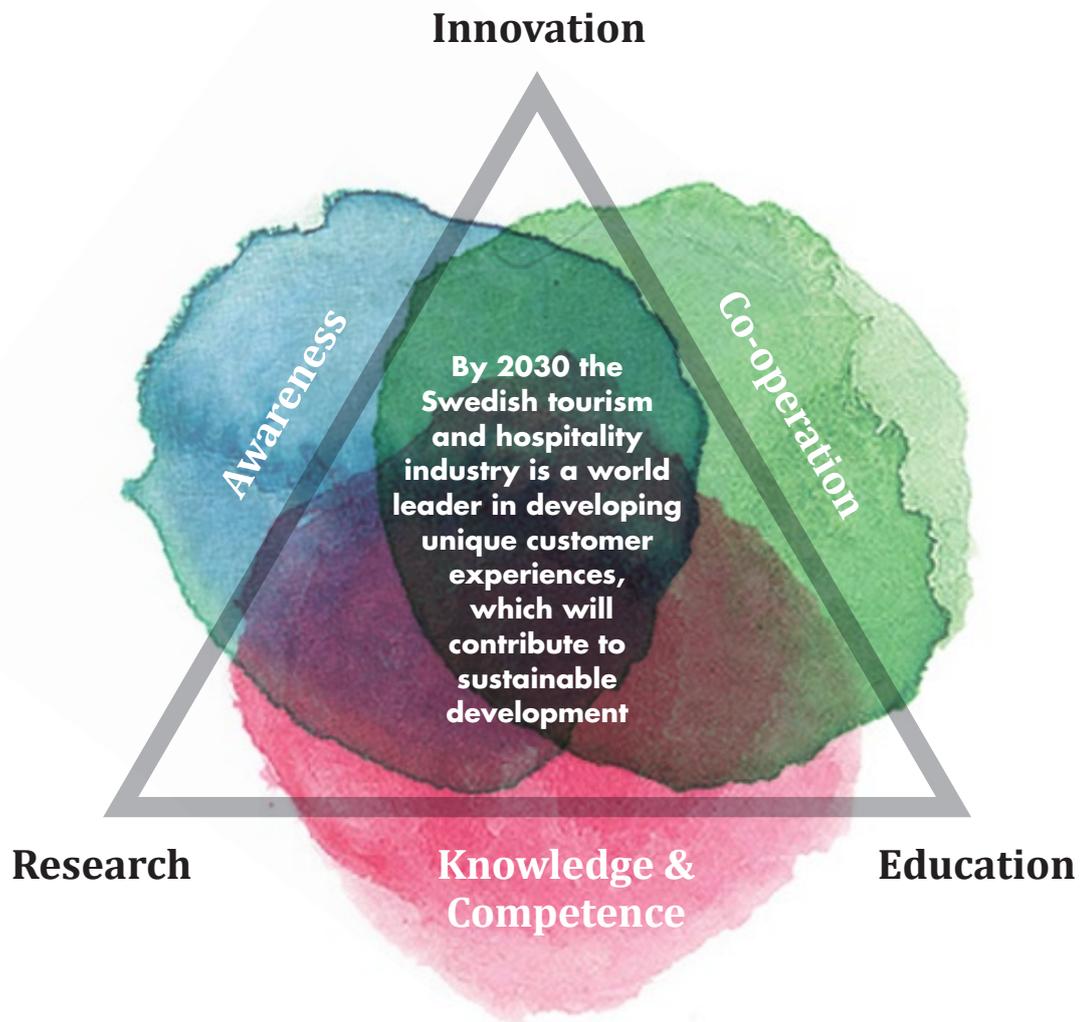
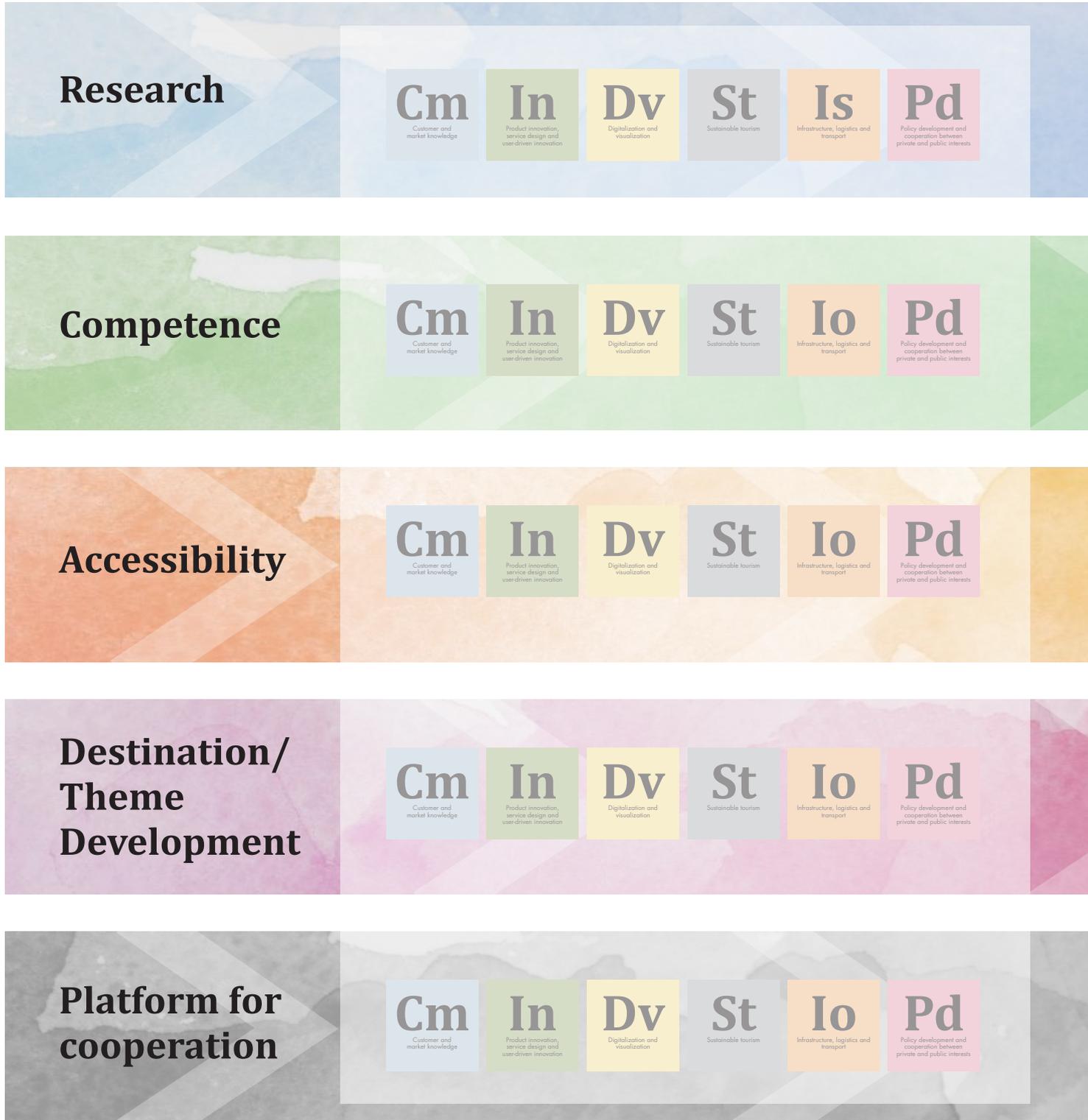


Figure 1: The platform for cooperation

THE ROADMAP 2014-2030

Key Initiatives

Projects Supporting the Knowledge Areas



Short term goals
2016

Mid term goals
2020

Long term goals
2030

Vision

A well established and prioritized re-search platform

Defined plans to secure fulfillment of resource gap and leadership development

Short term action and long term planning for accessibility

Close cooperation with Sw. Agency for E&R Growth to drive destination development

Focused governmental and public sector priorities

Established eco-system and meeting places

To reach SEK 200 billion in annual tourism export

Generation of 100 000 new jobs in Sweden

Sweden will have an overall ranking among the top-3 in the World Economic Forum TPCI Index

Swedens ranking of the pillar Prioritization in Society from 74 to top 15 in the World Economic Forum TPCI Index

The vision for this agenda is for the Swedish tourism and hospitality industry to, by 2030, become a world leader in developing unique customer experiences, which will contribute to sustainable development.

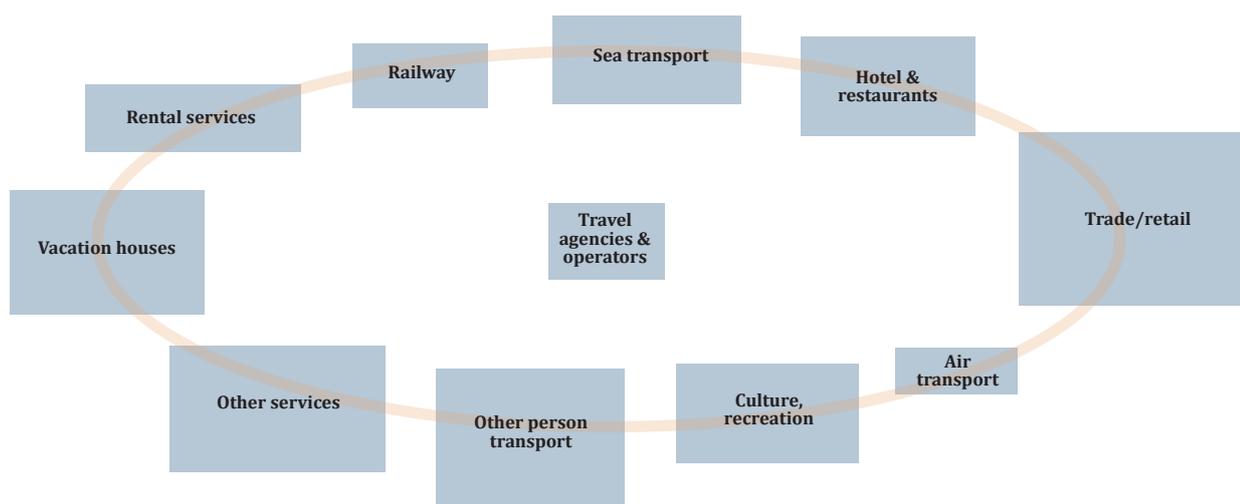
APPENDIX 1, DEFINITIONS

The tourism and hospitality industry¹

The tourism and hospitality industry is the industry that contributes to tourism consumption. Tourism is measured and defined from the consumption side and the internationally accepted definition of tourism that we use in Sweden is “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business or other purposes”.¹⁰

Tourism consumption constitutes a part of the sales of companies in the various sectors of the tourism and hospitality industry,

while other parts of sales are not defined as tourism consumption. This is shown schematically in the figure below, where the red ellipse illustrates that part of the turnover of the tourism and hospitality industry’s companies that constitutes tourism consumption. The tourism and hospitality industry is composed of several different sectors, which are more or less well-defined in existing statistics. The largest sectors are hotels and restaurants, transport and retail. Culture and nature experiences, meetings, sports activities and recreation composes other important sectors of the industry.



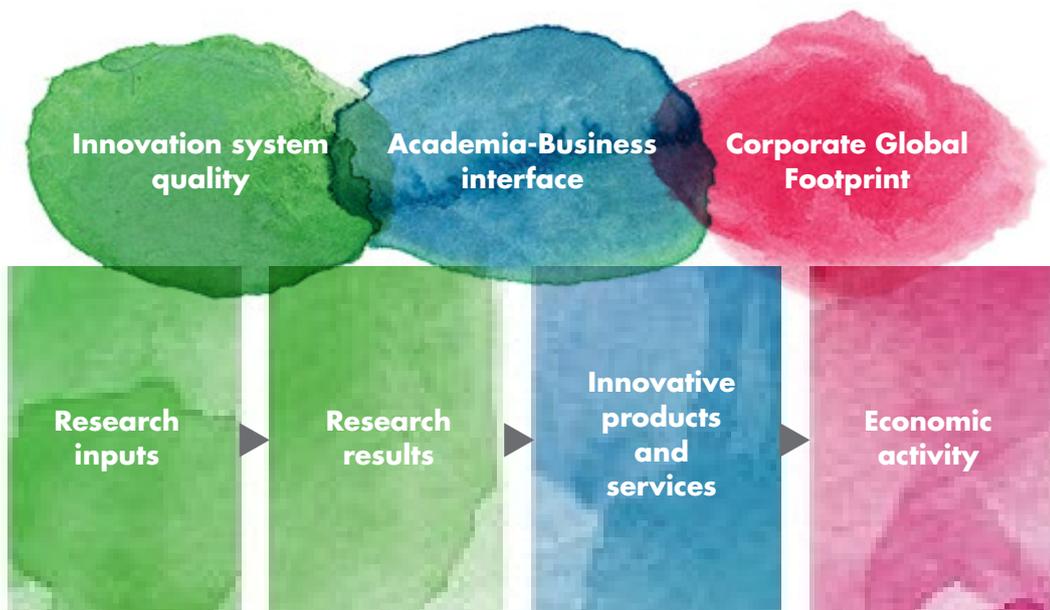
SOURCE: Swedish Agency for Economic and Regional Growth

What is Innovation systems?

An introduction or implementation of a new or significantly improved product, service or process, new marketing methods or new

ways of organizing business activities, the work organization or external relations.¹¹

Innovation systems and innovation support systems



Innovation system

The Innovations system includes individuals and organizations within research, business and public services who develop ideas in cooperation with each other in order to create added value through new products, services, processes or applications.

The innovation support system

In this agenda, the innovation support system refers to B, the latter part of the innovation system, that is to say actors with public financing who offer support to innovators, entrepreneurs and companies.

Sustainable tourism and hospitality industry

The sustainability concept includes the three interdependent dimensions: ecological sustainability, social sustainability and financial sustainability.

APPENDIX 2, CONTRIBUTORS

Editors and operative team phase 2:

November 2013

Stina Algotsen, BFUF
Peter Berggren, Knowit AB
Anna Hag, Visita
Malin Ackholt, HRF
Lena Larsson, HUI research AB

Steering Committée, Board of BFUF:

Claes Bjerkne, Visita
Ella Niia, HRF
Jonas Siljhammar, Visita
Malin Ackholt, HRF
Christer Johansson, Visita
Patricia Persson, HRF
Susann Pripp Andersson, Visita
Kaj Wesslén, HRF

Reference team:

Svensk Tourism AB

Magnus Nilsson
Yvonne Ingman, Swedish Trade Federation
Eva Östling, Visita
Erik Thulin, Passagerarrederiernas förening
Eva Werkelin, Kneippbyn
Mats Forslund, Jämtland Härjedalen Tourism
Hans Gerremo, SLAO
Magnus Ling, STF
Maria Nygren, The Transport Group
Patric Sjöberg, Stockholm International Fairs
Mikael Ahlerup, Astrid Lindgrens World

Swedish Agency for Economic and Regional Growth

Christina Rådelius
Dennis Bederoff
Peter Terpstra

Visit Sweden

Thomas Brühl
Ulrika Halesius

Reference Team Academia:

Maria Lexhagen, Phd, Mid Sweden university, ETour
John Ambrecht, Phd, Centrum för Turism,
Gothenburg university
Dieter Müller, professor, Umeå university
Åsa Öström, professor Örebro university
Lotta Braunerhielm, Phd, Karlstad university, CERUT
Susanna Heldt Cassel, associate professor,
University Dalarna
Kenneth Carling, professor, University Dalarna
Hans-Olof Daunfeldt, HUI Research AB, professor,
University Dalarna
Anna Grönberg, Uppsala University innovation
Regina Summer, SNITTS
Håkan Spjuth, Fyrklövern
Malin Zillinger, PhD, Lunds Universitet-Campus Helsingborg
Lars Lindkvist, professor, Linneaus University
Christer Foghagen, lektor, Linneaus University
Niklas Johansson, Viktoria Swedish ICT
Christina Öhman, Interactive Institute
Miriam Scaglione, professor, HEC Tourism, Valais

Editors and operative team phase 1:

March 2013

Stina Algotsen, BFUF
Erika Charbonell, RTS

Steering group phase 1:

March 2013

Stina Algotsen, BFUF
Erika Charbonell, RTS
Jan Lundin, RTS
Peter Thomelius, Visita
Pim van Dorpeln, Visita

Documentation for the sections Trends, Development and Future demand:

Björn Arvidsson & Sofi Sjöberg, Razormind
Niklas Gustafsson, HUI Research AB

Interviewees autumn 2012:

Suzan Stenberg, Business Incubator JHT
Sylvia Nylin, The Swedish Tourism Association
Ulf Eriksson, SU Innovation
Ulrika Halesius, Visit Sweden
Lisa Voltaire, Visit Sweden
Tina Olsson, Visit Sweden
Linda Eriksson, Visit Sweden
Camilla Nyman, Göteborg & Co
Henrik Jutbrink, School of Business Economics and
Law at Göteborg University
Magnus Kroon, Swedish Trade Federation
Bengt Linde, Krögarföreningen Göteborg/Visita
Jan Åman, Academy of Art, Atelier Food
Anette Eriksson, Atelier Food
Peter Terpstra, Swedish Agency for Economic and
Regional Growth
Anders Landgren, You Turn
Anders Tärnell, Hertz
Bo Svensson, ETour
Christian Åberg, Swedish Welcome
Dieter Müller, Umeå University
Hans Ollongren, SAS
Thomas Laurell, Visita
Anders Johansson, Hospitality Visions
Lena Mossberg, School of Business Economics and
Law at Göteborg University
Carl Jan Granqvist, Måltidsakademien
Lotta Sand, Travel & Education Centre, YH
Mats Olsson, Kalmar Science Park
Per Andre, Innovationskonsult
Per Erling Evensen, Destination Gotland
Otto Wiksell, Razormind AB
Åsa Minoz, Modig&Minoz

Workshop 2012-12-07 - Perspective of the Regions:

Lotta Magnusson, Region Dalarna
Karin Ekebjerg, Regional Association Kalmar (participated
by telephone/email)
Pia Jonsson-Rajgård, Region Skåne (participated by email)
Carla Aguirre Munoz, Region Skåne
Mats Forslund, Jämtland Härjedalen Tourism (participated
by email/sent input)
Lena Andersson, Region Gävleborg

Workshop 2012-12-11 – The Role/Perspective of Public Authorities:

Tobias Kreuzpointer, Swedish Board of Agriculture
Geetali Chatwal-Jonsson, Invest in Sweden
Ingvar Jundén, Swedish Environmental Protection Agency
Ulrika Karlsson, Swedish Environmental Protection Agency
Anna Ramstedt, National Property Board Sweden
Solweig Adolfsson, Swedish Transport Administration
Christina Rådelius, Swedish Agency for Economic and Regional Growth
Therese Lindberg, Swedish Agency for Economic and Regional Growth
Dennis Bederoff, Swedish Agency for Economic and Regional Growth
Peter Terpstra, Swedish Agency for Economic and Regional Growth

Workshop 2013-01-10 - Design Process and the Tourism and Hospitality Industry:

Robin Edman, SVID/Designagendan
Eva-Karin Anderman, SVID/Designagendan
Lovisa Lönnebo, Skansen
Erik Spongberg, Skilodge Engelberg
Andreas Näsman - Consultant
Erika Charbonnel, RTS

Workshop 2013-02-05 Needs/Areas of Knowledge:

2 groups of around 60 persons each participated in the workshop in conjunction with Visita's leadership forum in Tylösand

Workshop 2013-08-29 – The Hospitality Industry Perspective:

60 Business leaders representing Visitas regional trustees, workshop at Vår Gärd

Workshop 2013-10-10 – Workshop on Accesibility:

Maria Nygren, The Transport Group
Anna Wilson, Svenskt Flyg
Einar Tufvesson, The Swedish Transport Agency
Christina Rådelius, Swedish Agency for Economic and Regional Growth
Dennis Bederoff, Swedish Agency for Economic and Regional Growth
Maria Ottosson, Swedish Maritime Administration
Elisabeth Elmsäter Vegsö, Stockholmsstrategin
Mikael Castanius, Association Ports of Sweden
Niklas Johansson, Viktoria Swedish ICT
Lena Larsson, HUI Research AB
Anna Hag, Visita
Peter Berggren, Knowit AB
Stina Algotson, BFUF

Workshop 2013-10-15 – Workshop on Competence:

Mia Liljestränd, Confederation of Swedish Enterprise
Frida Lindvall, Swedish Public Employment Service
Caj Luoma, The Transport Group
Linda Mildner, YH myndigheten
Ann-Kari Edenius, Ratio, Kompetens för Tillväxt
Lotta Braunerhielm, CERUT, Karlstads University
Åsa Öström, Hotell- och Restauranghögskolan, Örebro University
Anders Rehn, Handelns yrkesnämnd
Lotta Fogde Andreasson, Region Skåne
Laila Gibson, Visit Värmland
Petra Lindberg, Kurbits
Peter Terpstra, Swedish Agency for Economic and Regional Growth
Peter Thomelius, Visita
Pim van Dorpel, HRF
Anna Hag, Visita
Peter Berggren, Knowit AB
Stina Algotson, BFUF

Workshop 2013-11-06 – Workshop on Destination development:

Ossian Stiernstrand, Göteborg & Co
Pia Jönsson Rajgård, Region Skåne
Carl Johan Ingeström, Visit Dalarna South
Stina Porsgard, Västerviks kommun
Mattias Grapenfelt, STF
Susanne Fredriksson, Visit Östergötland
Lena Stävmo, Destination Småland
Bo Svensson, ETOUR/Midsweden University
Anna Grundén, Midsweden University, Håll Sverige Rent
Lotta Nibell-Keating, Västsvenska Turistrådet
Tina Olsson, Visit Sweden
Elisabeth Elmsäter Vegsö, Stockholmsstrategin
Peter Lindqvist, Stockholm Visitors Board
Sofia Wollman, Gotland
Maria Nygren, The Transport Group
Christina Öhman, Interactive Insitute
Marie Wahlström, MTC Stiftelsen
Marika Kullberg, Ministry of Enterprise
Dennis Bederoff, Swedish Agency for Economic and Regional Growth
Lena Larsson, HUI Research AB
Stefan Johansson, HUI Research AB
Anna Hag, Visita
Peter Berggren, Knowit AB
Stina Algotson, BFUF

APPENDIX 3, SOURCES

REPORTS

Nationell strategi för svensk besöksnäring - hållbar tillväxt för företag och destinationer, Svensk Turism, 2010

Den nationella innovationsstrategin, Näringsdepartementet, Regeringskansliet 2012

Tillväxt genom innovationer - värdeskapande inom besöksnäringen och inom de kulturella och kreativa näringarna, seminarierapport, Region Dalarna, 2012

Strategiska initiativ för utveckling av besöksnäringen i Skåne, Tjänsteinnovation och tillgänglighet, Region Skåne 2011

En innovationsstrategi för Gävleborg, Region Gävleborg

Vision, mål, strategi för besöksnäringen Jämtland Härjedalen, 2011

Kairos Future, Century Management, 2012

Fakta om svensk turism - fakta & statistik 2011, Tillväxtverket, 2012

Kartläggning av turismforskningsmiljöer i Sverige, Förstudie Rb5 2012, Tillväxtanalys, 2012

Turismens betydelse, Litteraturoversikt över forskning kring destinationsutveckling, dnr 2012/010, Tillväxtanalys, 2012

IBIS 2011, Tillväxtverket 2012

Kunskapsutveckling genom samverkan - Kunskapsnytta genom samarbete för praktiker i svensk besöksnäring och akademiker, 2009, Centrum för turism Handelshögskolan vid Göteborgs universitet, Sanja Vujicic

Besöksnäringen i Sverige, Kommunindex 2010, Top 100, Trendrapport: Business as (un)usual, 2012, Svensk Handel, SHR, American Express

iFramtiden, Trendrapport 2012, Svensk Handel

NRA-Flyg 2010

Policy Brief, Flyget möjliggör för nya möten och kongresser, 2012, Föreningen Svenskt Flyg

Nationell strategi för svensk besöksnäring, strategi2020 Source: UNWTO

OECD, Oslo Manual for Measurement and Comparison of Innovations in Companies

Visita (then SHR), VisitSweden, HRF, the Swedish Agency for Economic and Regional Growth, (previously LFV), Nätverket Sveriges Regionala Turistorganisationer/Västsvenska Turistrådet, Stockholm Visitors Board and with financial support from the Swedish Board of Agriculture

Fakta om Svensk Turism 2011, Tillväxtverket

McKinsey Global Institute, Urban World, Mapping the Economic Power of Cities, 2011 UNWTO 2012

IBIS 2011, Tillväxtverket 2012

Kartläggning av turismforskningsmiljöer i Sverige, Förstudie Rb5 2012, Tillväxtanalys, 2012

The Travel & Tourism Competitiveness Report 2013 - Reducing Barriers to Economic Growth and Job Creation, World Economic Forum 2013

Turismens betydelse, Litteraturoversikt över forskning kring destinationsutveckling dnr 2012/010, Tillväxtanalys, 2012

Tillväxtvärk? En kartläggning av kompetensbehovet inom hotell- och restaurangbranschen till 2023, Karios Future, november 2013

The BFUF's search in January 2013 has been made in the project databases of the research finance bodies, the universities and the colleges and using the search concepts (see above) on their websites. The result was affected by whether the databases were updated or not, or whether they contained incorrect information. We have noticed this on several occasions and make reservation for any incorrect/missing information.

FOOTNOTES

1. Nationell strategi för svensk besöksnäring (National Strategy for the Swedish Tourism and Hospitality Industry), strategi2020

2. Visita (then SHR), VisitSweden, HRF, the Swedish Agency for Economic and Regional Growth, (previously), Nätverket Sveriges Regionala Turistorganisationer/Västsvenska Turistrådet, Stockholm Visitors Board and with financial support from the Swedish Board of Agriculture

3. Fakta om Svensk Turism 2011 (Facts about Swedish Tourism 2011), Swedish Agency for Economic and Regional Growth

4. McKinsey Global Institute, Urban World, Mapping the Economic Power of Cities, 2011

5. UNWTO 2012

6. IBIS 2011, Swedish Agency for Economic and Regional Growth 2012

7. Kartläggning av turismforskningsmiljöer i Sverige (Mapping Tourism Research Environments in Sweden), Pilot Study Rb5 2012, Tillväxtanalys, 2012

8. Turismens betydelse, Litteraturoversikt över forskning kring destinationsutveckling (The Importance of Tourism, Literature Review of Research into Destination Development), journal No 2012/010, Tillväxtanalys, 2012

9. The BFUF's search in January 2013 has been made in the project databases of the research finance bodies, the universities and the colleges and using the search concepts (see above) on their websites. The result was affected by whether the databases were updated or not, or whether they contained incorrect information. We have noticed this on several occasions and make reservation for any incorrect/missing information.

10. The Transport Administration's proposal for a national plan for the transport from 2014-2020; N2013/2942/TE

11. Source: UNWTO

12. OECD, Oslo Manual for Measurement and Comparison of Innovations in Companies