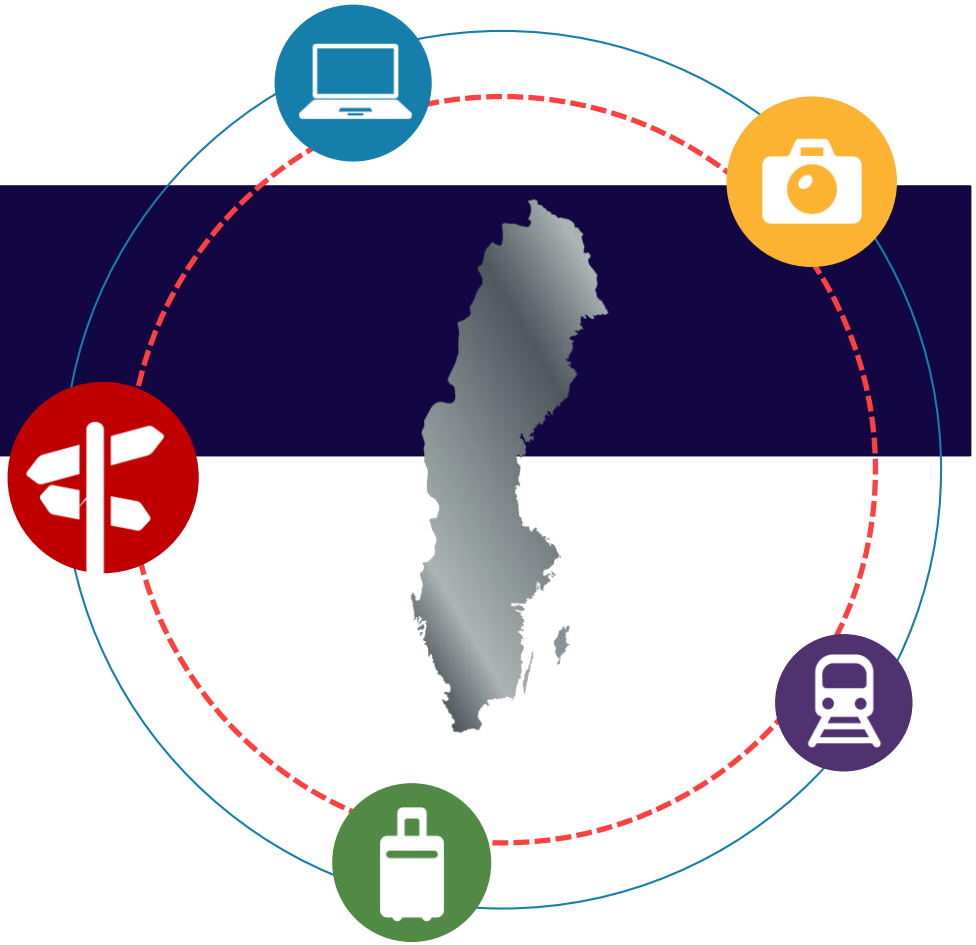
Market and Trade Profile: Sweden



Sweden

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Swedish travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Swedish visitors in the UK.

- **Chapter 2: Understanding the market** takes a close look at Swedish consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by the Swedish are also highlighted.

- **Chapter 3: Access and travel trade** shows how the Swedish travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Swedish travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents

Chapter 1:

Inbound market statistics

Chapter 1: Inbound market statistics

Chapter summary

- The Swedish outbound market is forecasted to account for almost 17 million trips abroad with at least one overnight stay by 2020. The UK was the 6th most popular destination for such trips in 2016.
- The Swedish rank globally in 24th place for international tourism expenditure with US$14.5bn.
- Sweden was the 14th largest inbound source market for the UK for volume and 13th most valuable in 2016.
- Looking at Swedish holiday visitors to Britain, France was the most considered competitor destination.
- The Swedish source market has a good seasonal spread with Q4 (Oct-Dec) and Q2 (Apr-Jun) the strongest quarters.
- 89% of departing Swedish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short break.

2016: £458m spend in UK

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, VisitBritain/IPSOS 2016, CAA 2016 based on leisure visitors

Chapter 1.1: Key statistics

Key insights

- Sweden is Britain's 14th largest source market in terms of visits and 13th most valuable for visitor spending (2016).
- 46% of spending came from holiday trips and 30% from business visits in 2016.
- Whilst the volume of business visits is yet to catch up with its pre-financial-crisis level, spend has recovered to £136m in 2016.
- London is the leading destination for a trip to Britain but South East, Scotland and the North West are also popular (based on average nights spent in the UK in 2014-2016).
- The most popular activities undertaken by Swedish travellers in Britain include shopping, going to the pub, visiting parks and gardens, visiting museums and art galleries as well as castles and historic houses followed by religious buildings.

The UK was 6th most popular destination for Swedish outbound travel (2016)

Source: International Passenger Survey by ONS, Oxford Economics overnight trips

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	14.5
Global rank for international tourism expenditure	24
Number of outbound overnight visits (m)	14.1
Most visited destination	Spain

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	748	3,617	276
2008	743	3,563	354
2009	604	3,278	253
2010	758	3,743	357
2011	794	4,318	410
2012	777	3,652	383
2013	784	4,193	441
2014	869	4,042	503
2015	850	3,914	510
2016	821	3,905	458
Share of UK total in 2016	2.2%	1.4%	2.0%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	821	-3%	14
Nights (000s)	3,905	0%	15
Spend (£m)	458	-10%	13

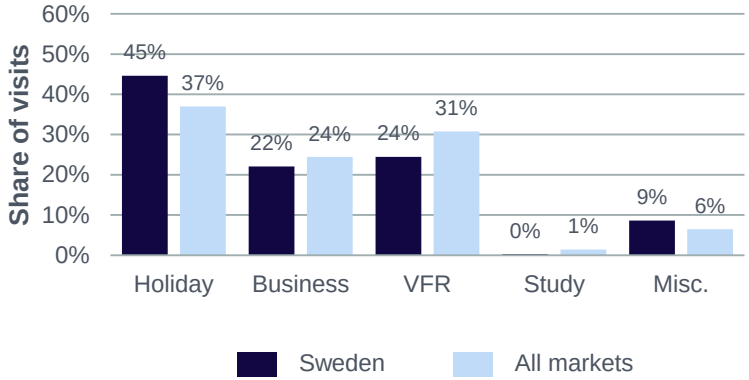
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	4	£127	£571
Business	4	£190	£751
Visiting Friends/ Relatives	6	£60	£372
All visits	5	£117	£558

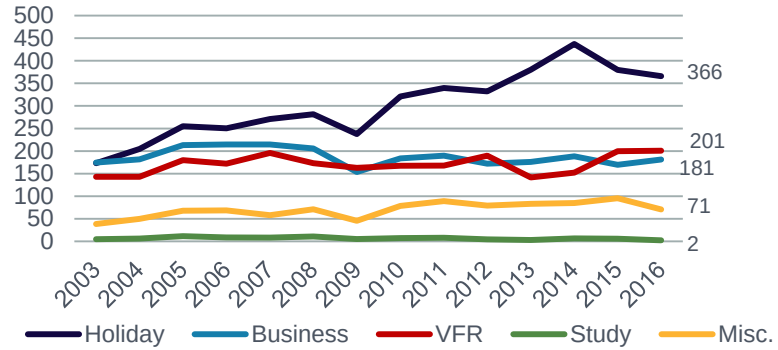
Source: International Passenger Survey by ONS

1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



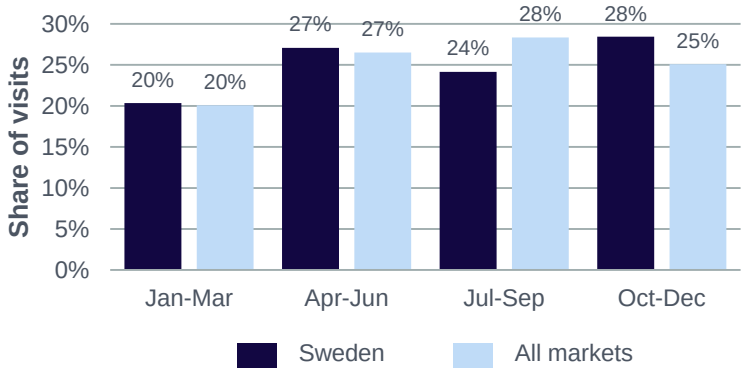
- In 2016, 45% of all visits to the UK from Sweden were made for holiday purposes, followed by 24% of visits to visit friends and/or relatives.
- 79% of holiday visits from Sweden to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average between three and four times in the past ten years (a high visit frequency) and spent £1,862 in the UK in total whilst the average European holiday repeat visitor spent £1,626 in the same time frame.

- Holiday and VFR visits lead in terms of volume of visits from the Swedish market. In 2016, 46% of spending came courtesy of holiday visitors, 30% from business visits and 16% from visits to friends and/or relatives.
- Whilst the volume of business visits is yet to catch up with its pre-financial-crisis level, spend has recovered in recent years and stood at £136m in 2016.
- 96% of those coming to the UK for business visits (excl. expats) had been to the UK before as had 90% of those coming to visit friends or relatives who live in the UK.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015

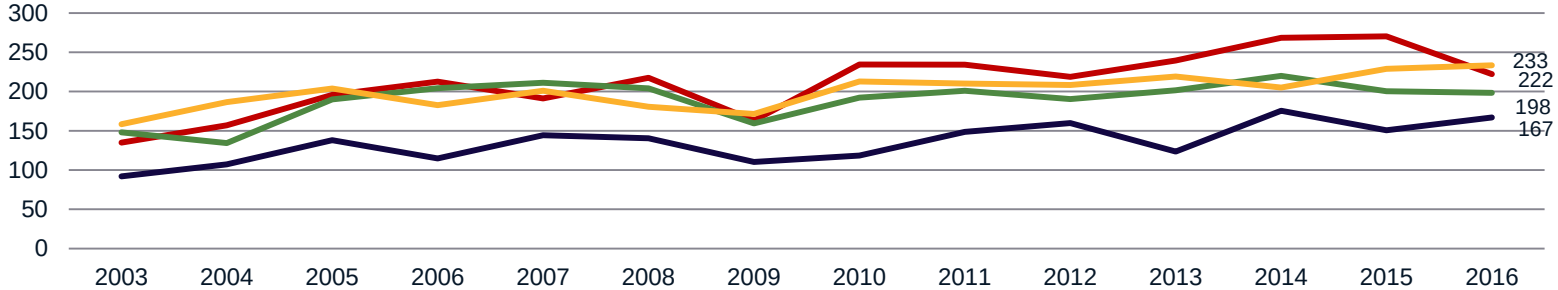
1.1 Key statistics: seasonality

Seasonality 2016



- In 2016, 28% of visits from Sweden to the UK were made in the last quarter followed by 27% between April and June. The summer quarter, which is high season for many other markets, saw a below average share of Swedish visits with 24%. 1 in 5 visits from Sweden were made in the first quarter.
- The period between April and June saw the most visits from Sweden for several years although proved less popular than October-December in 2016.

Seasonality trend (visits 000s)

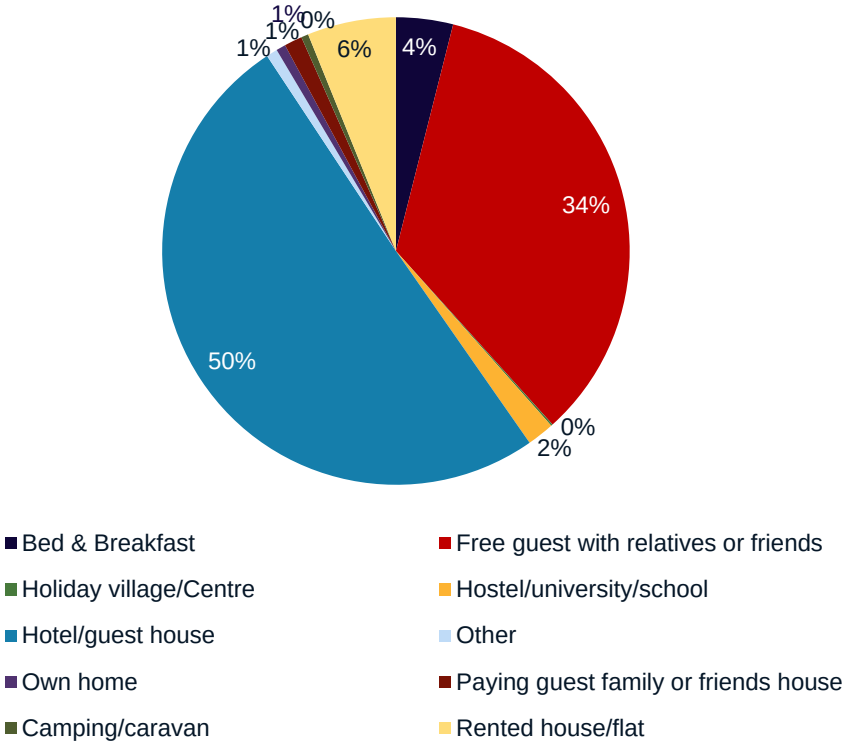


Source: International Passenger Survey by ONS

Jan - Mar Apr - Jun Jul - Sep Oct - Dec

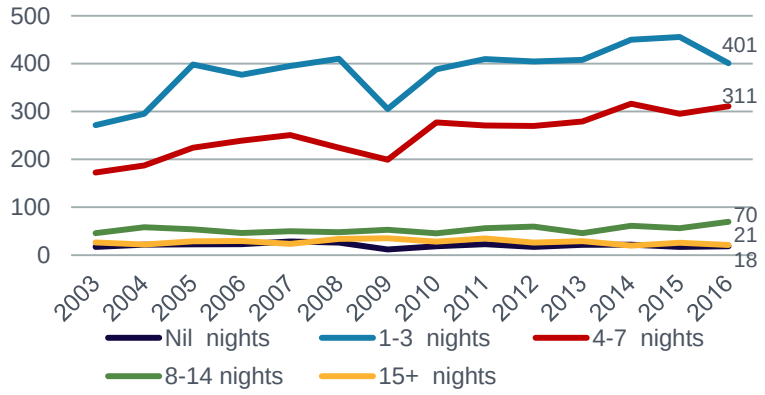
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, % share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Swedish visitors.
- Two forms of accommodation dominate the picture with half of Swedish visitor nights spent at a 'hotel/guest house' and 34% spent staying for free with relatives or friends. Rented houses/flats and bed & breakfasts accounted for a small share of Swedish nights with 6% and 4% respectively in 2016.

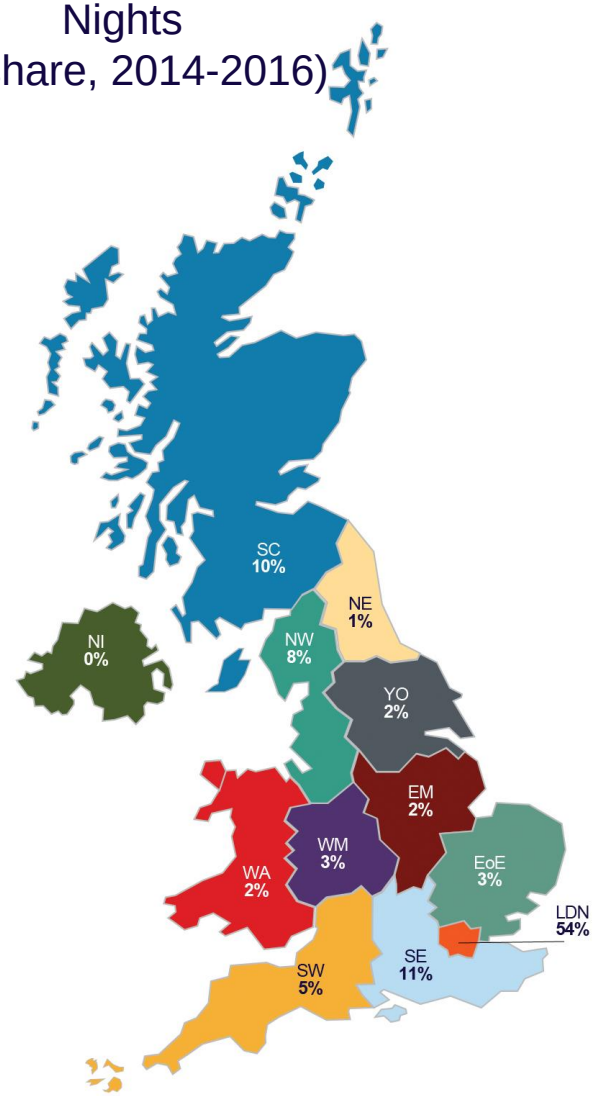
1.1 Key statistics: regional spread

Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	3,954	847
Scotland (SC)	376	73
Wales (WA)	63	12
Northern Ireland (NI)	1	1
London (LDN)	2,124	536
North East (NE)	49	6
North West (NW)	299	59
Yorkshire (YO)	88	19
West Midlands (WM)	110	27
East Midlands (EM)	77	18
East of England (EoE)	121	35
South West (SW)	206	35
South East (SE)	438	84
Nil nights (Nil)	N/A	19

Source: International Passenger Survey by ONS

Nights
(% share, 2014-2016)

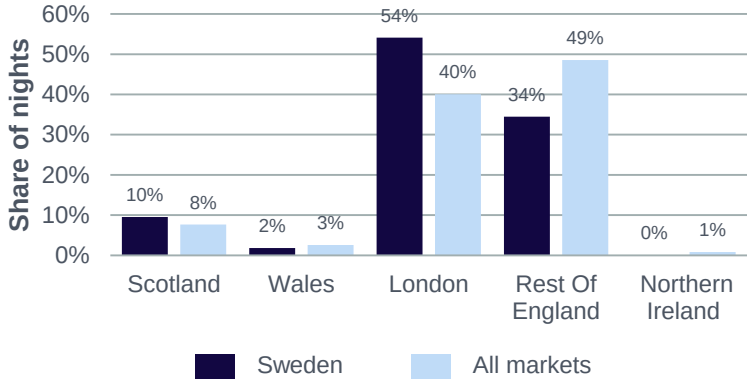


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

Town	Visits (000s, 2014-2016 average)
London	536
Edinburgh	41
Manchester	24
Liverpool	14
Brighton / Hove	14

Regional spread 2016

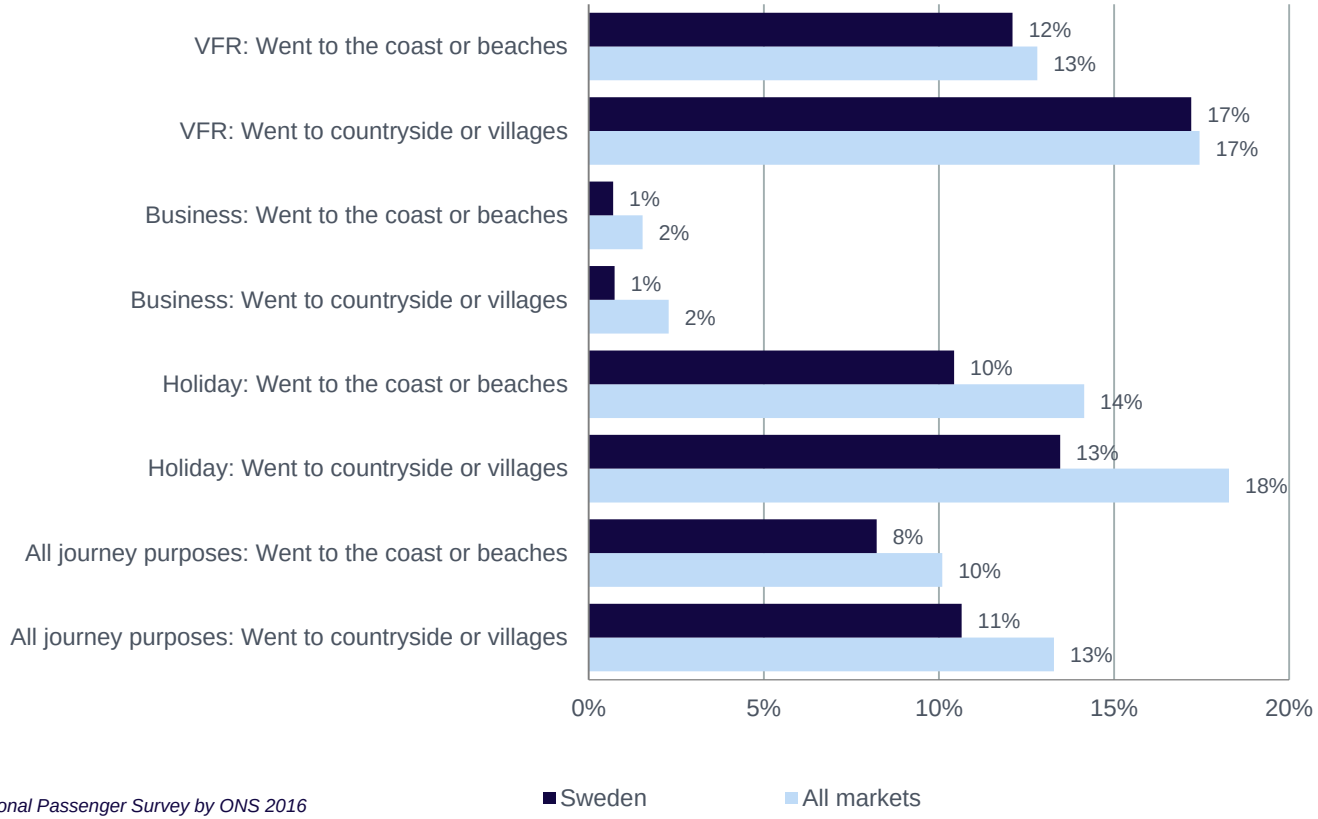


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

- London is the leading destination for a trip to Britain, accounting for 54% of visitor nights, but South East, Scotland and the North West are also popular based on the average nights spent in the UK in 2014-2016.
- Visitors from Sweden have a slightly below average propensity to visit rural and coastal areas of Britain. Visits to family and/or friends are most likely to feature this activity.
- 6% of visits from Sweden were bought as part of a package or an all-inclusive tour which is in line with the all market average. Holiday visits and miscellanous visits are more likely to be bought in this way, with 10% and 13% respectively bought as part of a package or an all-inclusive tour in 2016. 94% of Swedish visits to the UK were organised independently in 2016 (please note ONS definition of package holiday on page 16).
- The majority of Swedish respondents buy their tickets for transport in Britain whilst they are here (with the exception of internal flights), especially transport within London, airport transfers and train tickets. Airport transfers are also the method of transport which are most likely to be pre-booked with 25% of visitors reserving them in advance.

1.1 Key statistics: visits to coast, countryside and villages

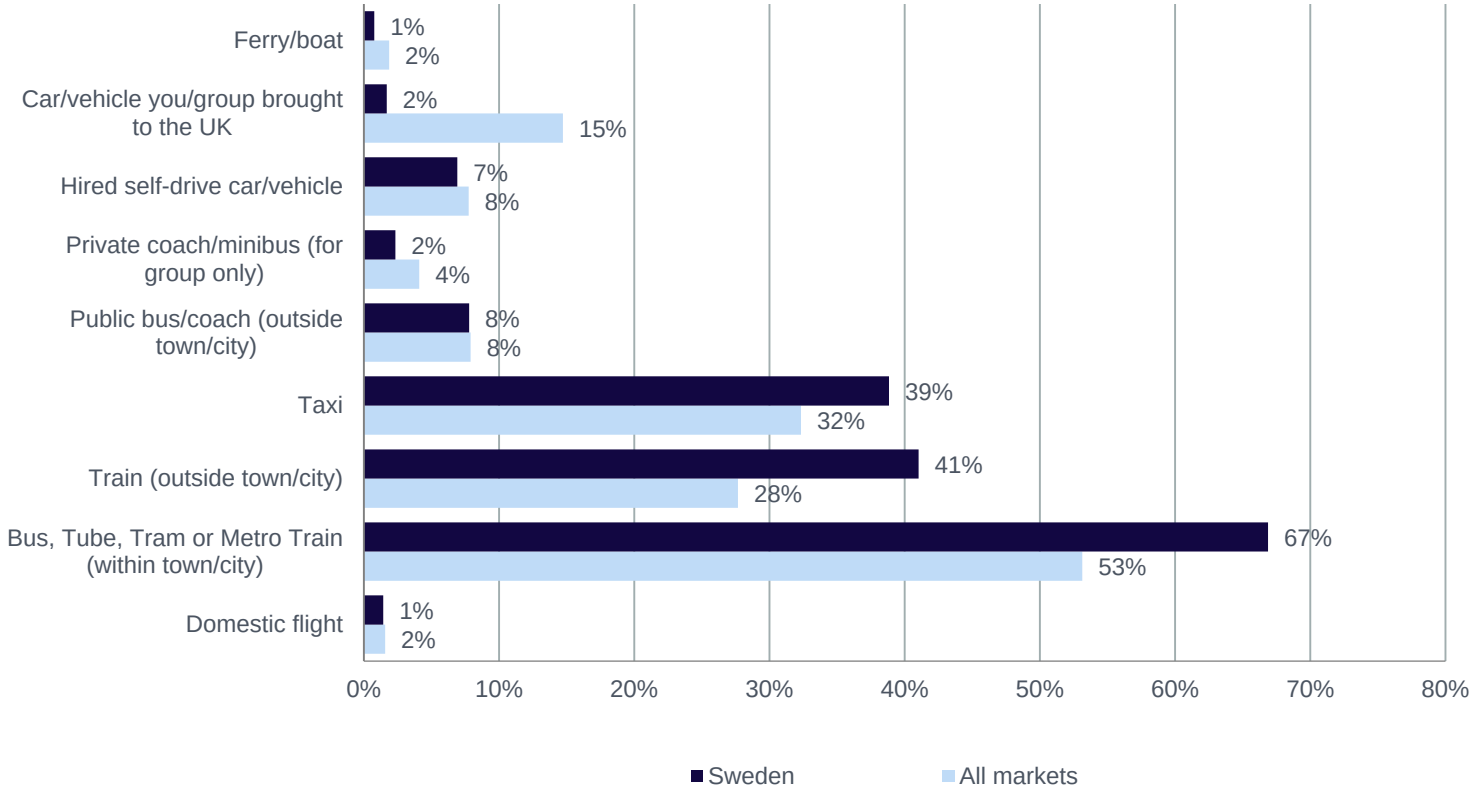
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

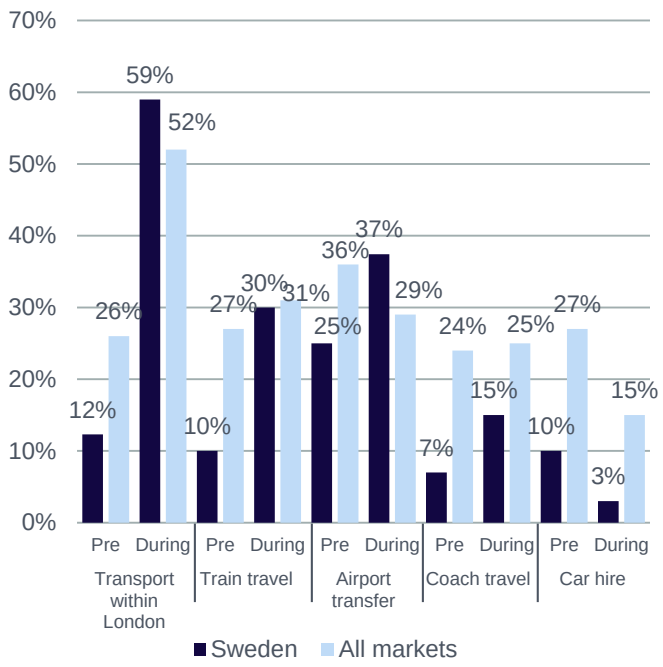
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS, 2013

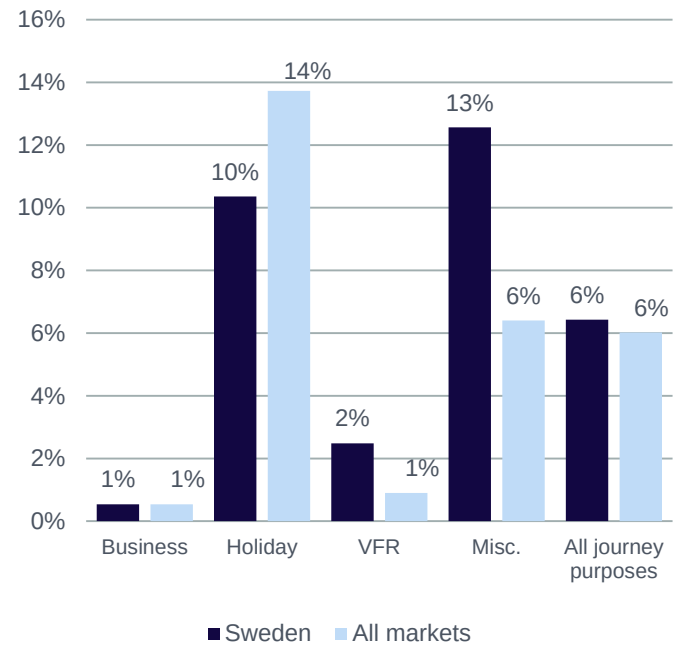
1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

1.2 Visitor demographics

Visitor characteristics

- Business visitors are nearly twice as likely to be male than female.
- Almost four-in-five holiday visitors are making a repeat visit to Britain (excl. UK nationals).
- Most visits from Swedish residents to the UK were made by Swedish nationals (90%), 4% by British nationals.
- 89% of departing Swedish travellers are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.
- 94% of departing Swedish felt ‘Very‘ or ‘Extremely‘ welcome in Britain.

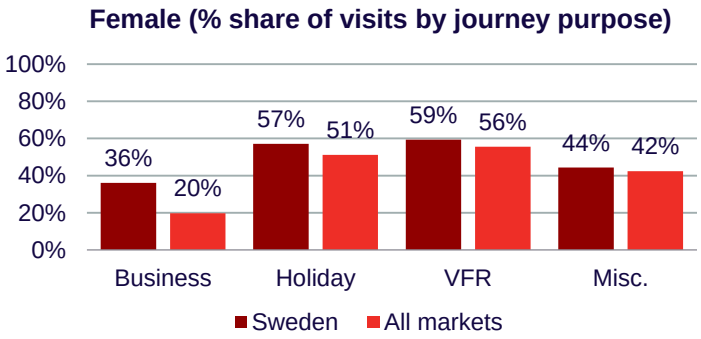
89%
‘Very’ or
‘Extremely’ likely
to recommend Britain
in 2016

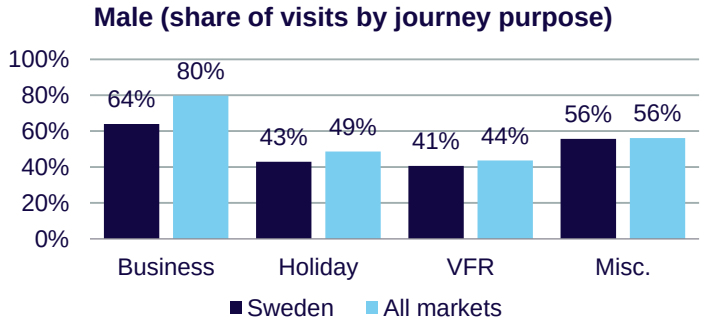
Source: International Passenger Survey by ONS, CAA 2016 based on leisure visitors

1.2 Visitor demographics: gender and age groups

Visitor demographics:

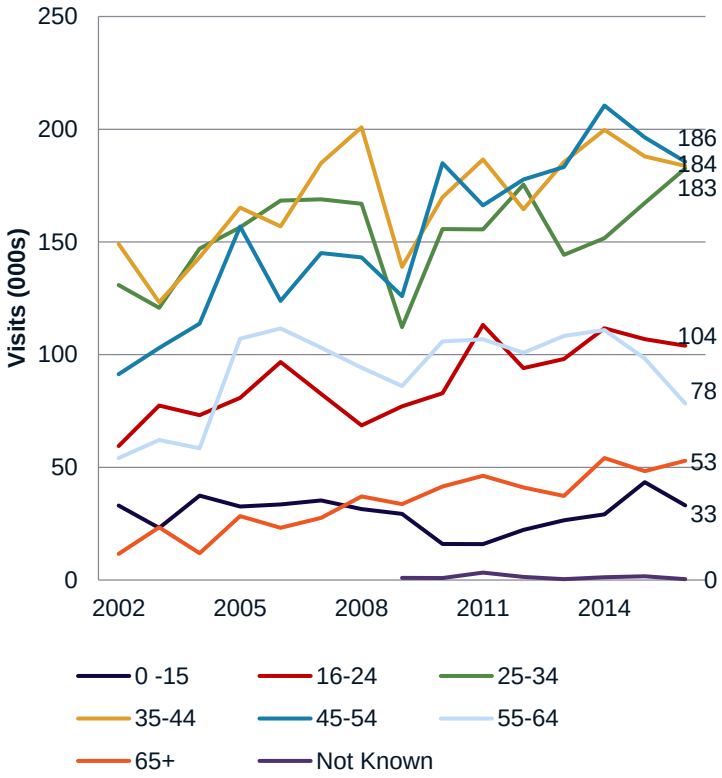
gender ratio of visits from Sweden:
52% female, 48% male





Source: International Passenger Survey by ONS

Age group trend



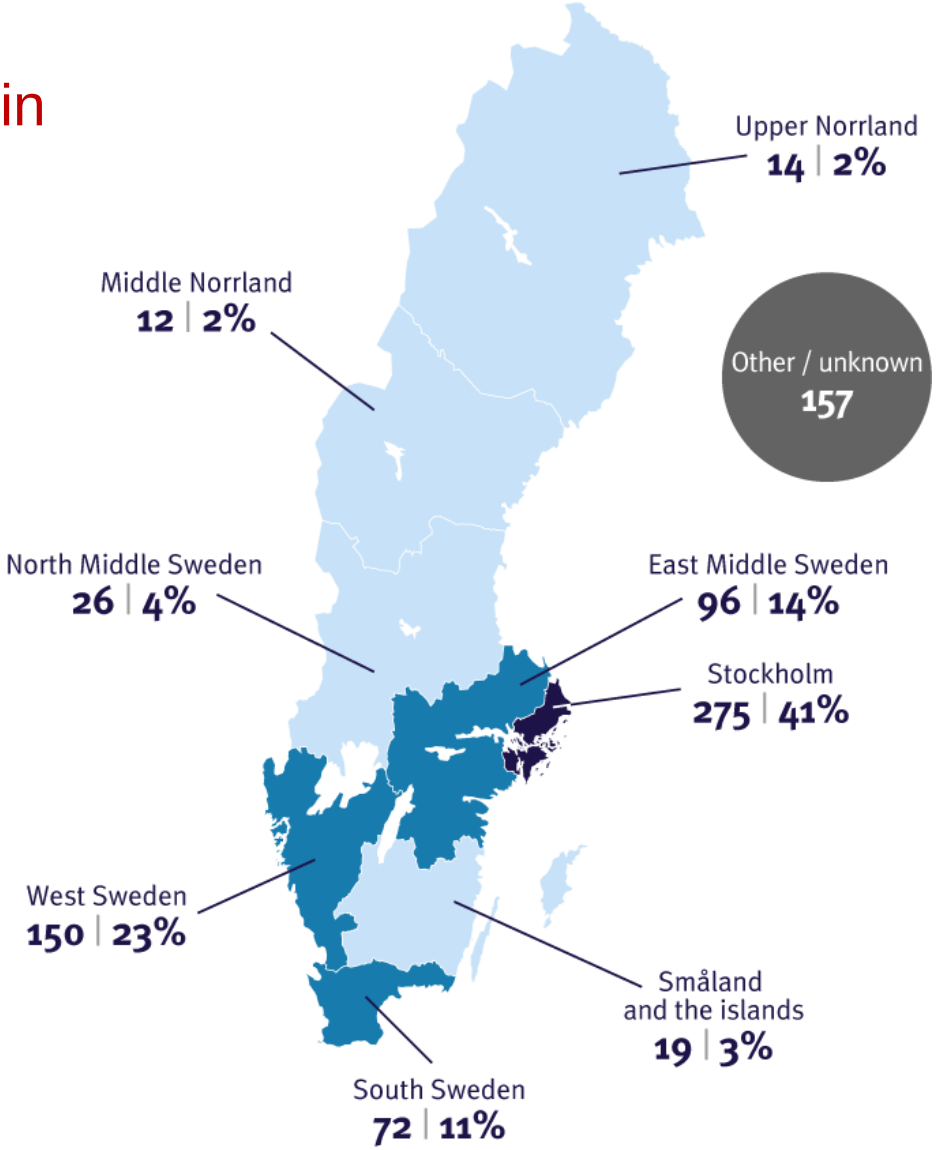
1.2 Visitor demographics: origin

Visits to the UK in (000) 2016

- The largest proportion of Swedish visitors to Britain reside in Södermanland (incl. Stockholm), Bohuslän and Skåne.
- The areas in Sweden with the most inhabitants are in the South and along the Baltic coast in the east. Inland areas of the north tend to be scarcely populated which explains the small share of visitors sourced from these areas.

Visits in 000s | % share of visits

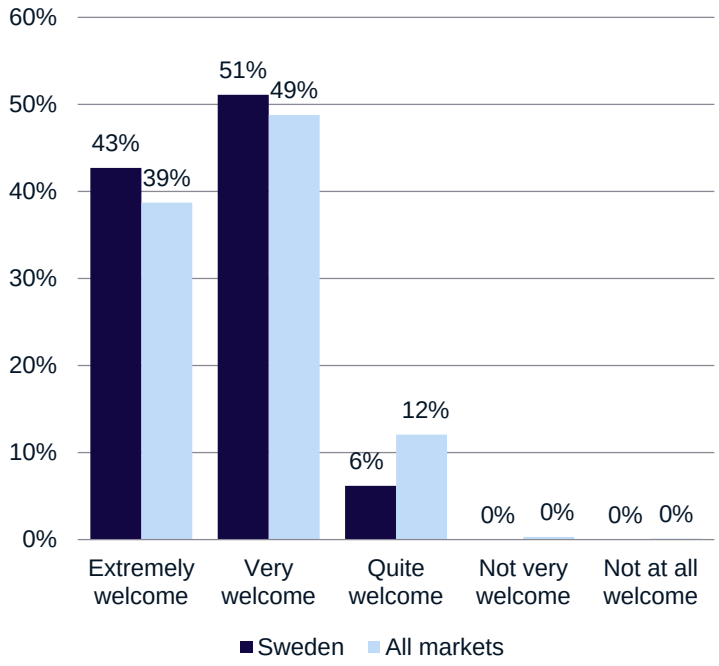
- High
- Medium
- Low



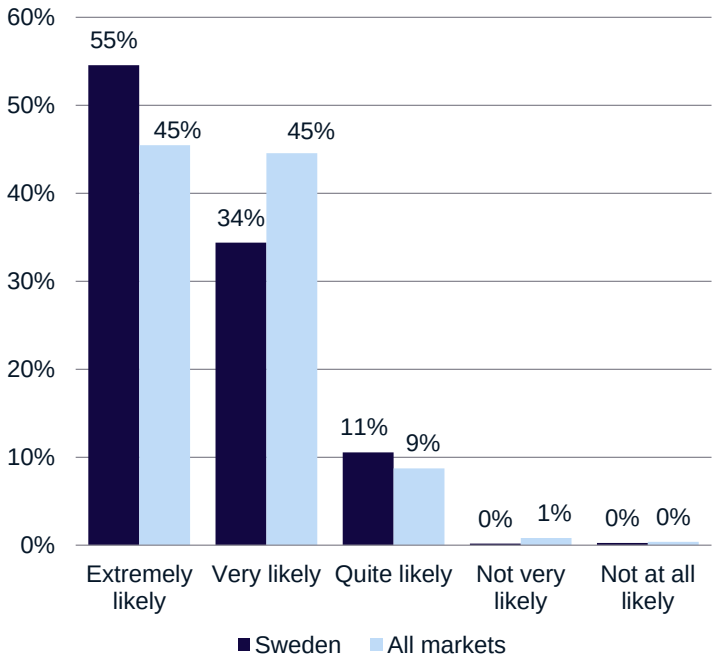
Source: International Passenger Survey by ONS, CIA World Factbook 2017

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016; asked to leisure visitors

1.3 Britain and competitors

Market size, share and growth potential

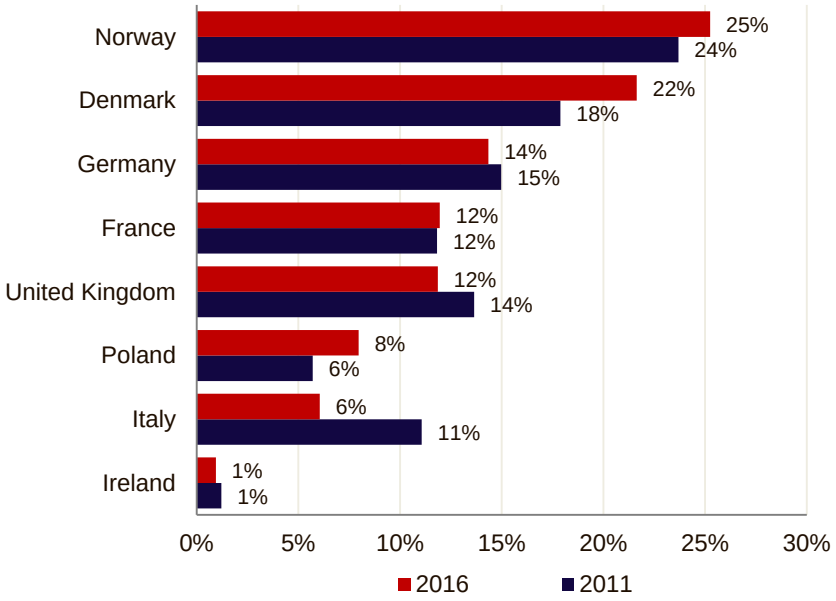
- Britain was the 6th most visited destination by Swedish travellers in 2016, behind Spain, Norway, Denmark, Germany and France.
- Forecasts suggest there is the potential for more than 40% growth in the number of Swedish outbound overnight trips by 2025. The number of visits to Britain is also forecasted to grow over the next decade.
- Of those who came to Britain for a holiday, France was most considered as an alternative destination. Two in five stated they had not considered any other holiday destinations.
- More than 80% of Swedish trips are taken for travel within Sweden, especially in the summer. Between 2014 and 2016 Swedish domestic travel has increased 10% while travel abroad has decreased.

Britain ranks 6th
for Swedish outbound destinations by volume

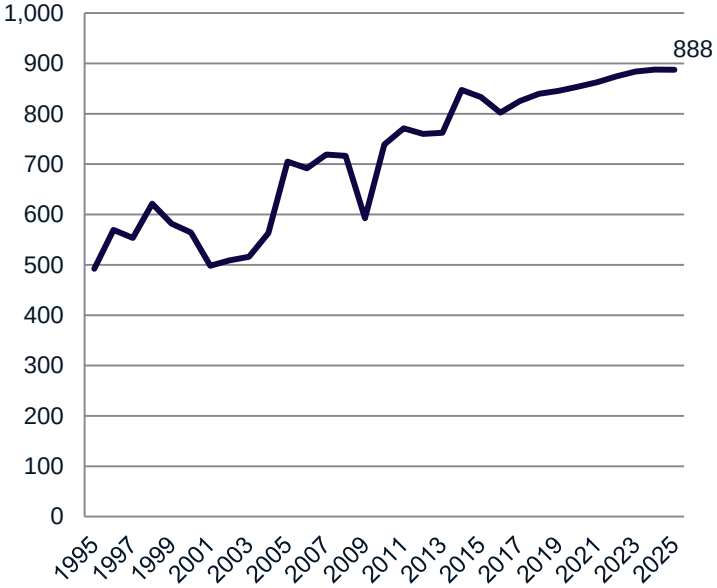
Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Swedish Tourism Survey conducted by HUI

1.3 Britain and competitors

Britain's market share of Swedish visits among competitor set



Historic and potential visits to Britain (000s)

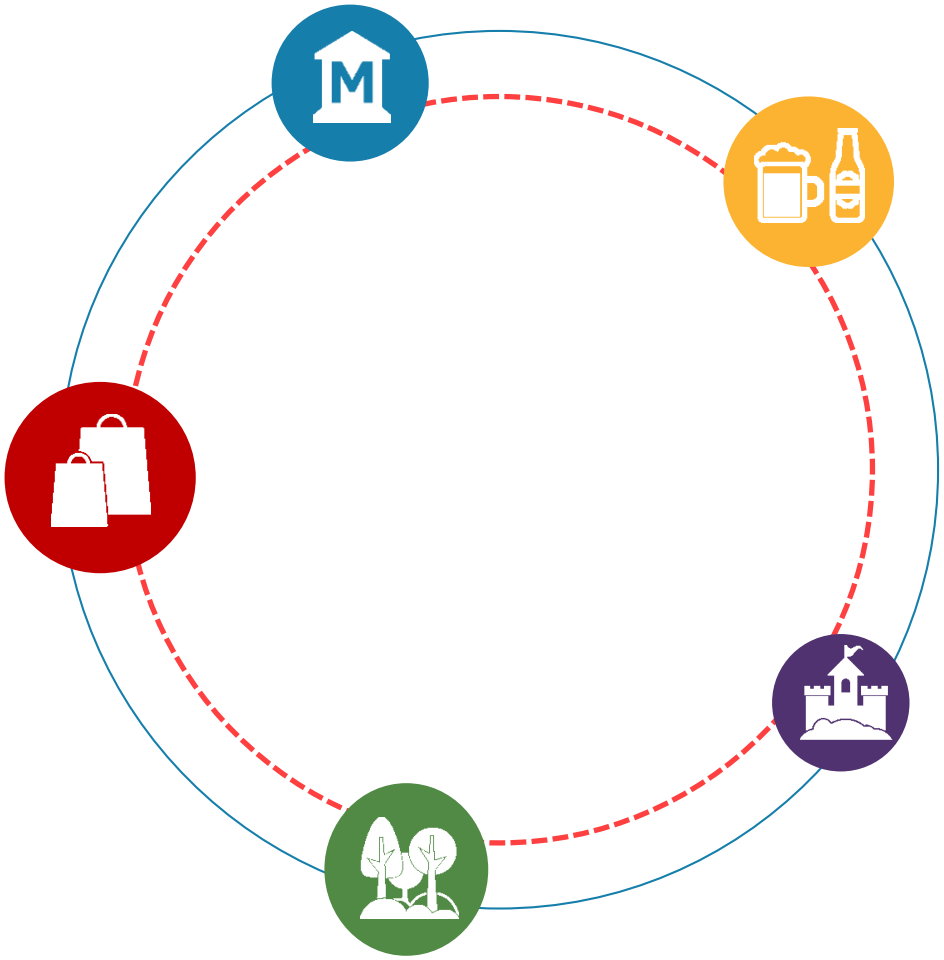


Source: Oxford Economics, overnight visits

1.4 Inbound activities

Inbound Britain activities

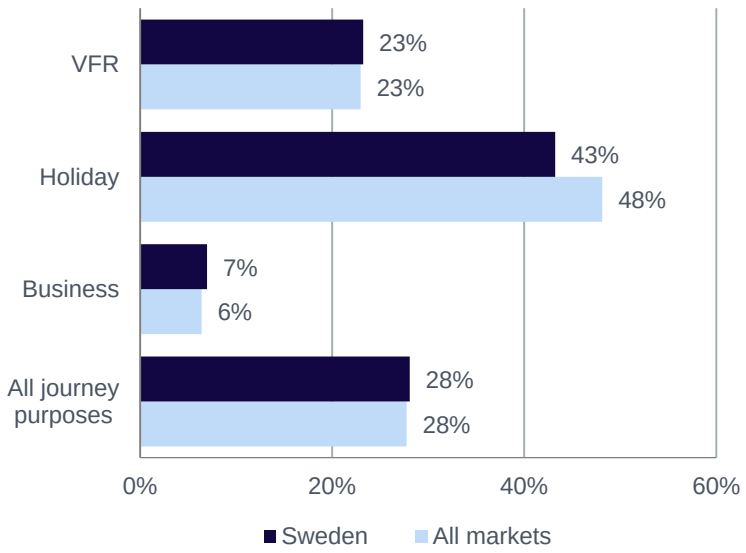
- Shopping is the number one activity which features in many Swedish visits.
- Built heritage sites, and especially museums, are important attractions for many visitors with almost one in three Swedish trips involving a visit to them.
- Half of holiday visits involve time in a park or garden.
- More than half of the Swedish like to dine in a restaurant or visit a pub in Britain. One in three like to socialise with locals.
- About 46,000 visits per annum feature time watching football.
- One in five Swedish visitors went to the theatre, opera, musical or ballet while in Britain in 2016, slightly above average.



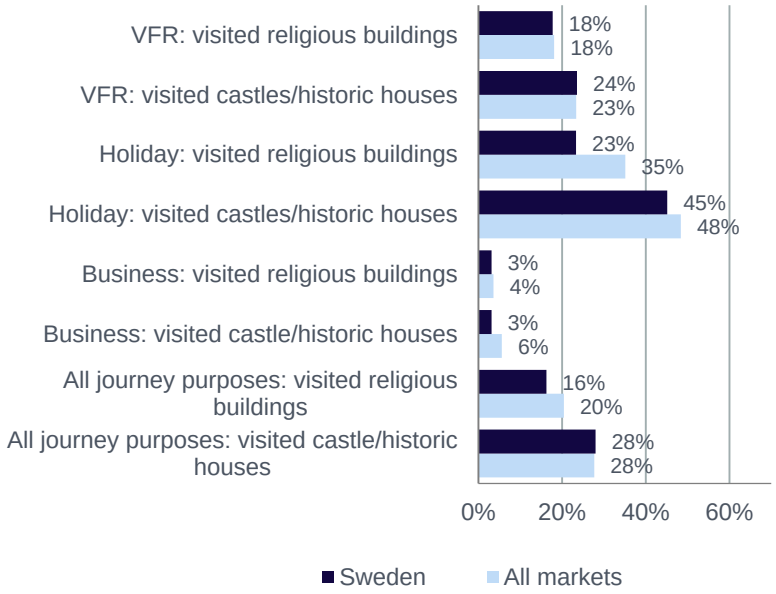
Source: International Passenger Survey by ONS, based on 2011 and 2016

1.4 Inbound activities

Propensity to visit museums and galleries



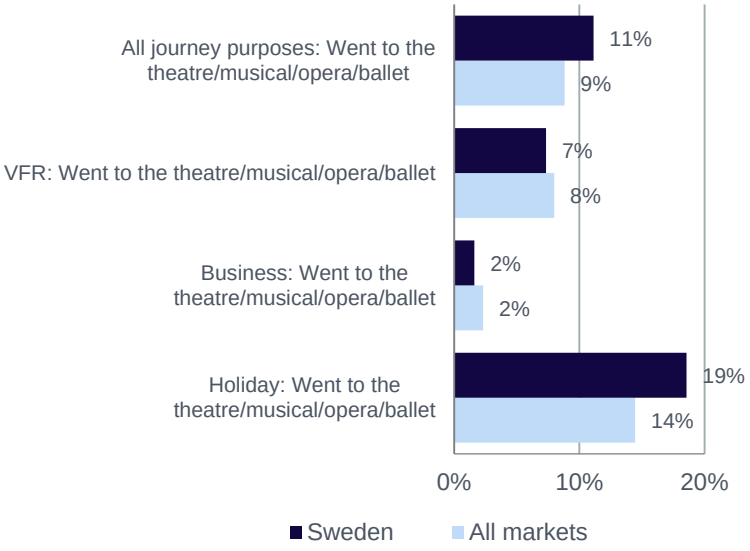
Propensity to visit built heritage sites



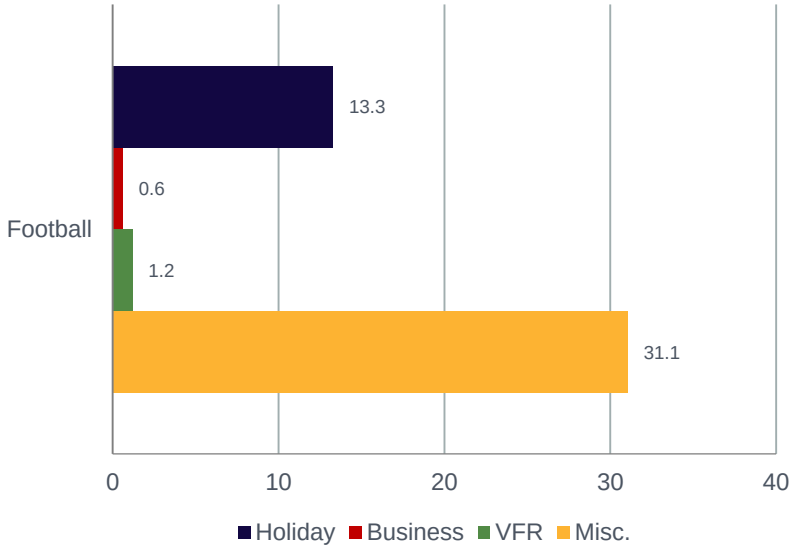
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to attend the performing arts



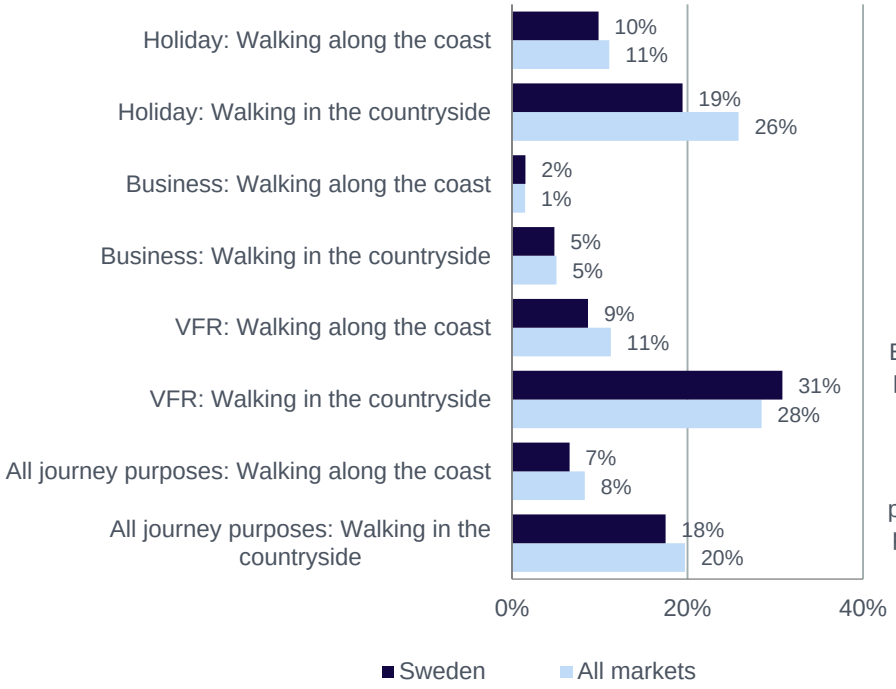
Number who went to watch football live during trip (000s)



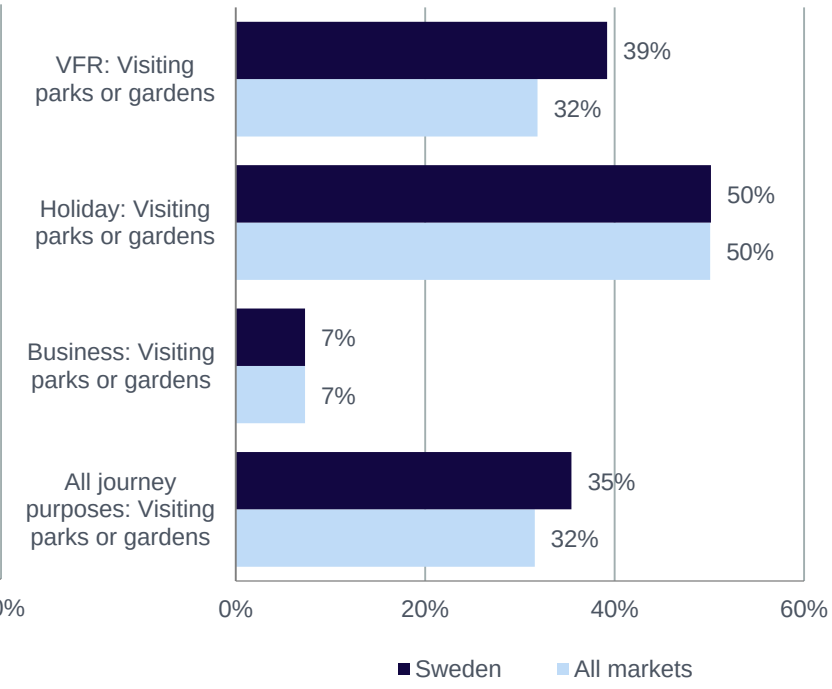
Source: International Passenger Survey by ONS 2011 and 2016

1.4 Inbound activities

Propensity to go for a walk



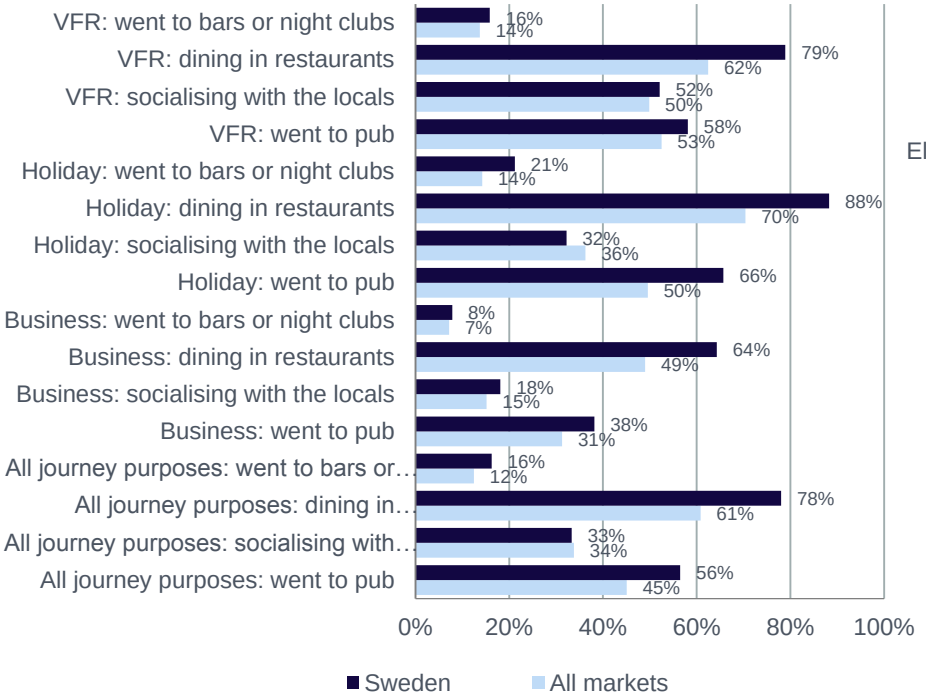
Propensity to visit a park or garden



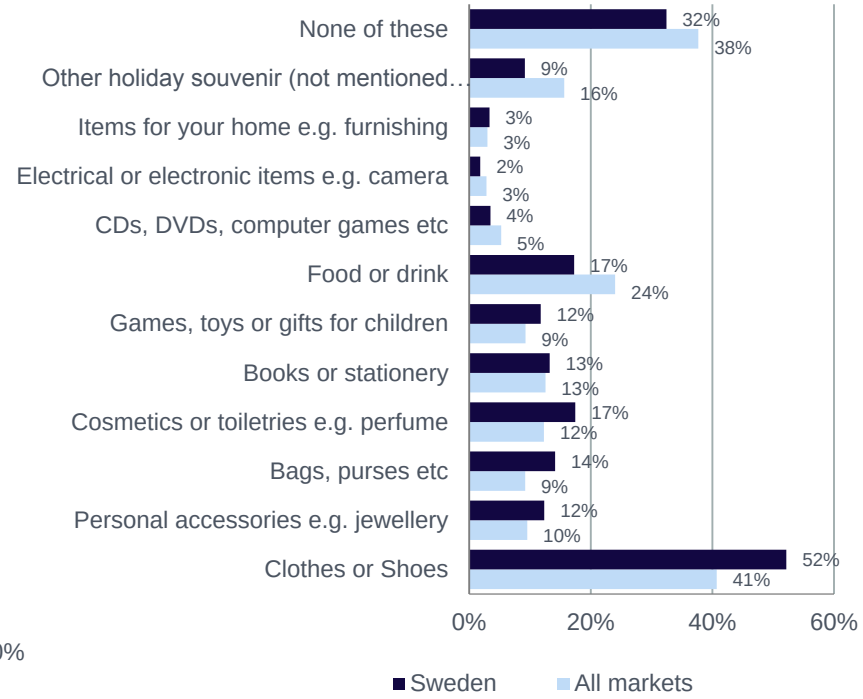
Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals



Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

Chapter 2:

Understanding the market

2.Understanding the market

Chapter summary

- Sweden has a population of about 10 million.
- Whilst 12% of the Swedish did not take overnight trips away from home in 2015, it is very common for the majority to go on more than one such trip, indicating that travel is important to them.
- About two in five Swedish holiday visitors tend to start thinking about their trip to Britain as early as half a year in advance or more.
- More than half of holiday bookings of a trip to Britain were made within two months before arrival, one in three booked between three to six months prior to departure.
- Friends, family and colleagues are by far the most important influence on the holiday destination choice.
- The Swedish rate Britain highly for its vibrant cities, contemporary culture and sport. One of Britain's strengths is the perception that it is a good destination for watching a sporting event and for shopping.

Cultural attractions & vibrant cities

Most important draws for Swedish visitors

Source: Arkenford 2013, Oxford Economcis, VisitBritain/IPSOS 2016, GfK Anholt Nation Brands Index 2016, Flash Eurobarometer 432 by EC 2016

2.1 Structural drivers

Demographics & society

- Population of about 10 million.
- Sweden has a parliamentary constitutional monarchy.
- There are 21 counties: Blekinge, Dalarna, Gavleborg, Gotland, Halland, Jamtland, Jonkoping, Kalmar, Kronoberg, Norrbotten, Orebro, Ostergotland, Skane, Sodermanland, Stockholm, Uppsala, Varmland, Vasterbotten, Vasternorrland, Vastmanland and Vastra Gotaland
- The highest populated areas are in the South and along the Baltic coast in the east; areas inland of the north tend to be scarcely populated.
- The official language is Swedish; Finnish, Sami, Romani, Yiddish and Meankieli are official minorty languages. Swedish people often have a good command of English and expect and usually enjoy speaking English when in Britain.
- Swedish employees are usually entitled to 25 days of annual leave and there are 11 public holidays per year in Sweden.

9.9m
Swedish population

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population	9,896,000
Net No. migrants per 1,000 population	5
Average annual rate of population change in 2015 - 2020	0.7%

Economic indicators

Indicator	2016	2017	2018
Real GDP	3.0%	3.5%	2.5%
Consumer spending	2.4%	2.6%	2.5%
Unemployment rate	6.9%	6.8%	6.7%
Average earnings	3.2%	2.6%	3.2%
Consumer prices	1.0%	1.8%	1.9%

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: general market overview

General market conditions

- Sweden was Britain's 14th largest source market in terms of visits and 13th most valuable for visitor spending in 2016.
- The Swedish economy has recently gained momentum with GDP growth above expectations due to healthy consumer spending and investment, despite increasing inflation. Real GDP is forecasted to grow by 3.5% in 2017. (Oxford Economics)
- The country has a population of about 10 million with a median age of 41.
- Most people in Sweden are well-educated and enjoy a very high standard of living with real GDP per capita in purchasing power parity terms of more than US$45,000, forecasted to increase in the years to come.
- Exchange rate: comparing the monthly average for August 2015 when GBP was very strong vs. SEK and August 2017, cost of GBP has become 21% more affordable for Swedish visitors to the UK.

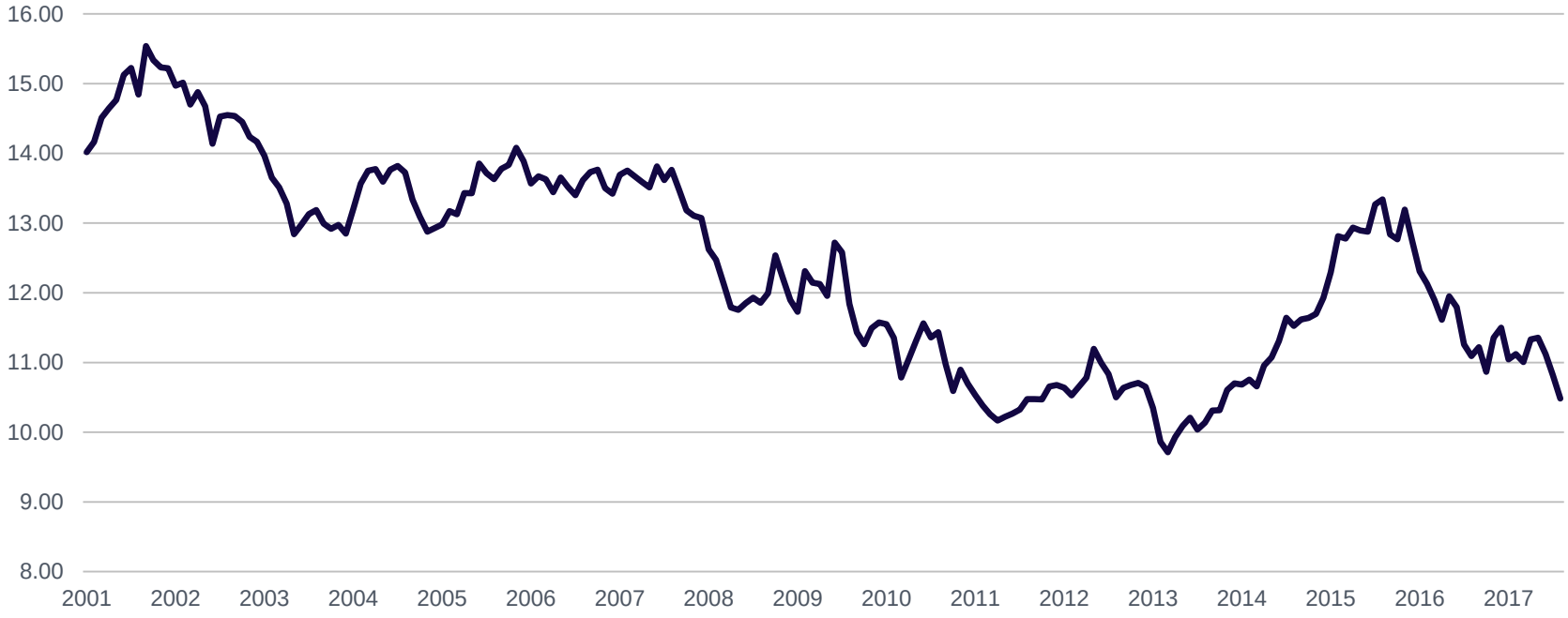
Key demographic and economic data

Measure (2016 data)	Sweden	Eurozone
Population (m)	9.9	336.8
GDP per capita PPP (US$)	45,668	38,070
Annual average GDP growth over past decade (%)	1.6	0.6
Annual average GDP growth in 2016 (%)	3.0	1.7

Source: Bank of England, Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in SEK)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source. Bank of England

2.2 Consumer trends

- The volume of domestic travel in Sweden increased by 10% from 2014 to 2016, whilst travel abroad decreased. More than 80% of overnight leisure trips made by Swedes are domestic, particularly popular in summer, whilst Swedes like to go abroad in winter when it gets cold and dark.
- The majority of Swedes book their holidays online and are familiar with e-commerce, especially the younger age groups.
- Swedish consumers tend to be environmentally conscious and nature tends to be important to them. Natural features and cultural and historical attractions are equally important features of a destination which would make more than one in three Swedes return to a destination.
- The sharing economy is also a growing trend in Sweden in line with other European markets and the Swedes are familiar with companies like AirBnB and Uber.

55%

of Swedes like to go abroad in the winter months while summer is often reserved for holidays at home.

Sources: Swedish Tourism Survey conducted by HUI,Traveller survey by Swebus, Svenskarna och interenet 2016, Flash Eurobarometer 432, March 2016, *Sharing Economy – embracing change with caution by Entreprenörskaps Forum*

2.2 Consumer trends: overall travel trends

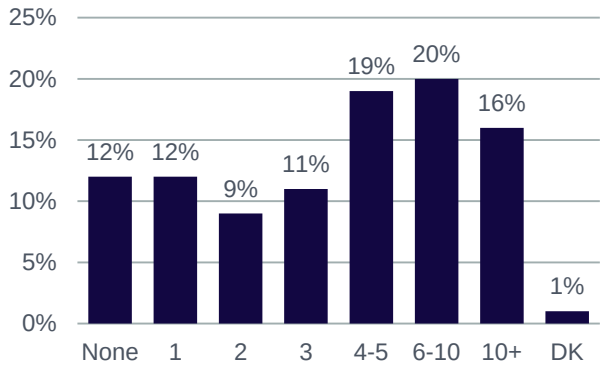
Travel trends

- The volume of domestic travel in Sweden increased by 10% from 2014 to 2016, whilst travel abroad decreased. More than 80% of overnight leisure trips are domestic (not including visits to family or staying in a summer house). Less than a fifth of paid overnight leisure trips are international.
- Many Swedes have a preference for staying in Sweden in summer and save holidays abroad for the winter months when it gets cold and dark. About three out of four Swedes stay in Sweden in summer. 55% of Swedes travel abroad in winter.
- More than 90% of the Swedish population has access to the Internet and 82% use it daily. It is more and more common to own a computer and a tablet as well as a smartphone. Of the average 24 hours per week that Swedes use the Internet, 9 of these are spend on the mobile phone.
- Travel had a share of more than 40% of Swedish e-commerce sales in 2015 (the most developed areas are transport including airline and train tickets and package holidays).
- The majority of Swedes booked their holiday online in 2015. 11% stated they booked over the counter in a travel agency. A smaller share of Swedish respondents used other channels. Growing penetration in the tablet market has driven online sales migration to mobile platforms and a growing number of Swedes use mobile devices for booking travel.
- Swedish consumers tend to be environmentally conscious and nature tends to be important to them. Natural features were just as important factors as cultural and historical attractions when they were asked which features of a destination would make them come back. A recent Eurobarometer survey revealed that 38% of Swedes try to avoid taking short-haul flights as part of their personal action to tackle climate change (the European average is one in ten). However, Swedes are less likely than the European average to say that environmentally-friendly practices or certifications play a role in their destination choice.

Source: Swedish Tourism Survey conducted by HUI,Traveller survey by Swebus, Svenskarna och interenet 2016, Special Eurobarometer 459, September 2017, Flash Eurobarometer 432, March 2016, *Travel in Sweden by Euromonitor, August 2016*

2.2 Consumer trends: motivation and attitudes to holidays

Number of overnight trips away from home for all journey purposes (%)



- Whilst 12% of the Swedish did not take overnight trips away from home, it is very common for the majority to go on more than one such trip.

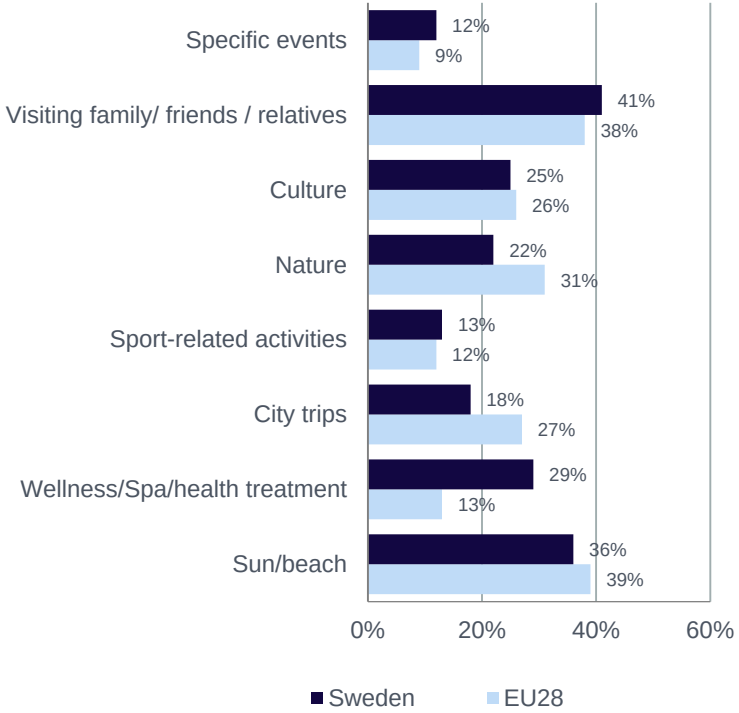
Motivation and attitudes to holidays

- The majority of Swedish said that they were unlikely to amend their holiday plans due to the economic situation (72%) and only 11% said that they go on holidays in 2016 but are likely to spend less (Flash Eurobarometer 432 by EC). This shows a much lower impact than the European average.
- The use of the sharing economy is a growing trend in Sweden in line with other European markets. The Swedes are familiar with companies like AirBnB and Uber and for many of them the price is not the only reason to choose these services. They also choose it for sustainability reasons.

Source: Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, Sharing Economy – embracing change with caution by Entreprenörskaps Forum

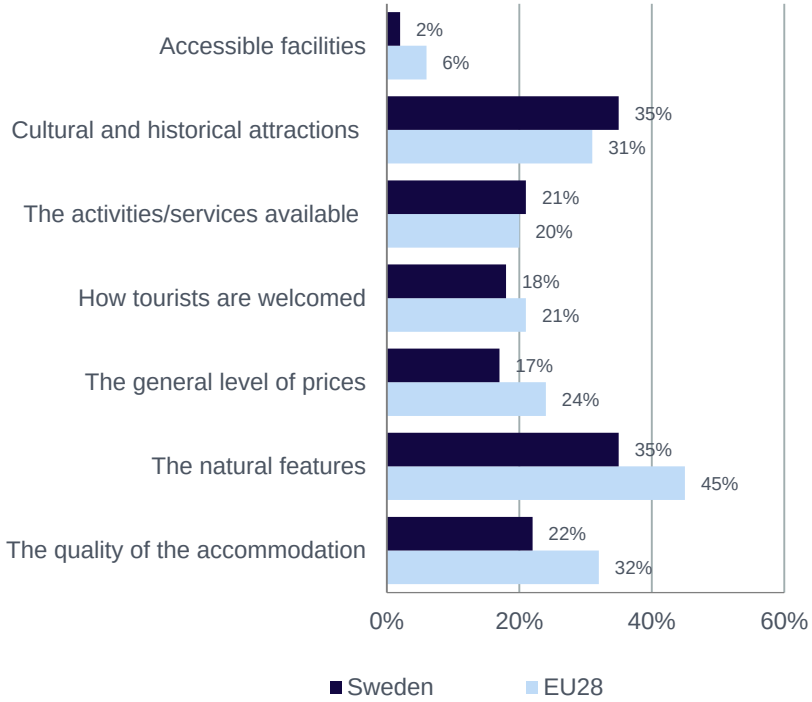
2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)



- Amongst the main reasons for going on a holiday for Swedish travellers are: visiting family/friends/relatives, sun/beach, wellness/spa/health treatment, culture, nature and city trips.

Reasons to return to the same destination for a holiday



- Asked for reasons which would make them come back, more than one in three Swedish value cultural and historical attractions as well as natural features, followed by the quality of the accommodation and the activities and services available.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?

2.3 Booking and planning

- A large proportion of Swedish holiday visitors tend to start thinking about their trip early with 38% doing this as early as half a year or more in advance.
- 36% of bookings were made in the three to six month window before the arrival to Britain; however, more than half of Swedish bookings happened within two months before the trip.
- Most bookings to Britain were made online; however, when travel and accommodation are booked together, about one in twelve visitors made the booking face-to-face.

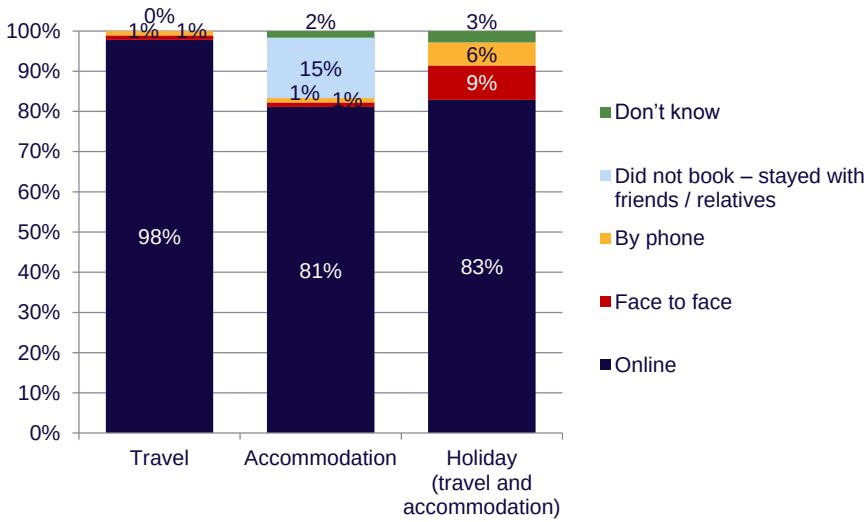
>50%

of Swedish visitors booked within two months of their arrival in Britain

Source: VisitBritain/IPSOS 2016

2.3 Booking and planning: booking channels and ticket sales

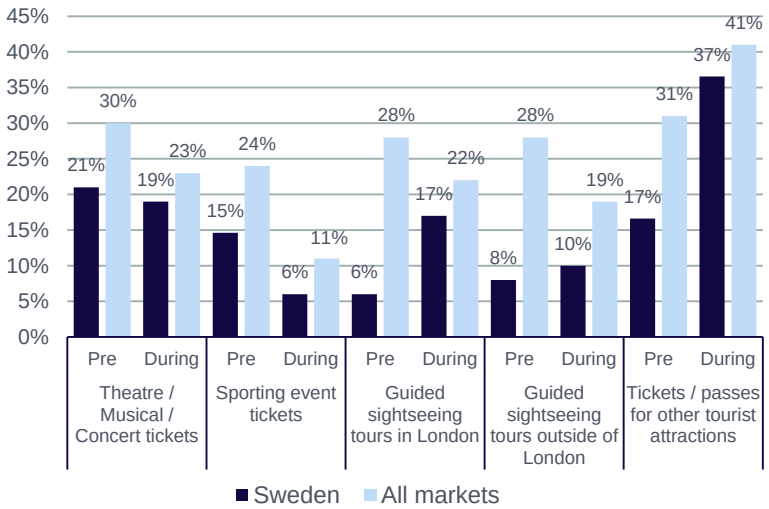
How trips to Britain were booked



- Swedish visitors tend to be very comfortable with booking their trips to Britain online. Almost all Swedes booked their travel on the Internet (i.e. transport to Britain).
- Only 9% of bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 26%.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

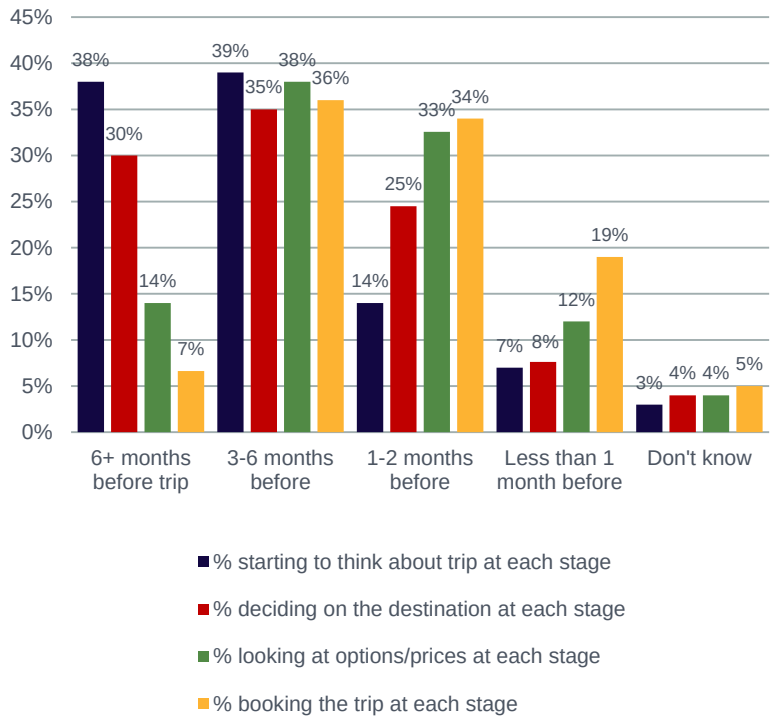
Propensity to make a purchase before or during trip



- Prior to trip: The proportion of purchases of the above items before the trip was below the all market average across all categories amongst Swedish respondents with theatre/musical or concert tickets the most likely to be bought in advance of the trip to Britain.
- During the trip: About one in five Swedes bought theatre, musical or concert tickets. More than one in three purchased tickets/passes for other tourist attractions.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- About two in five Swedish visitors start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; a similar proportion did this three to six months in advance.
- 65% made their decision to travel to Britain at least three months prior to the actual journey (just below half of these six months or earlier).
- Nearly two in five Swedish visitors looked at options and prices between three and six months ahead of the trip and 36% also made the booking in the same time frame. One in three were more spontaneous and looked at options between one and two months before the trip and 12% within one month. Compared to other markets, Swedes tend neither to be especially early nor late in their planning and booking behaviour.
- Most of the Swedish visitors who booked travel separately booked their transport directly with the service provider (64%). 48% of those who booked accommodation separately purchased it directly from a travel agent/tour operator or travel comparison website and the same share directly from the accommodation provider.

2.4 Reaching the consumer

- The most influential information source for Swedish visitors when making a holiday destination choice is, by far, friends, family and colleagues followed by price comparison websites and information from search engines. Talking to friends and family on social networks and travel agent and tour operator websites also feature among some of the most important influences on where to go for a holiday.
- Whilst travel providers and online sources are popular for researching and making a destination choice, almost one in five Swedes state that they consult travel guidebooks.
- About 80% of Swedes watch an average of 2 hours of TV per day (below the European average) and 70% of Swedes tune in to the radio.

Friends, family & colleagues

#1 Influence for the destination choice of the Swedish

Source: VisitBritain/IPSOS 2016, Sweden – Media Landscape by European Journalism Centre EJC 2017

2.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Public service television Sveriges Television broadcasts through 3 main channels: SVT1, SVT2 and Barnkanalen (children's channel) which make up about 35% of the Swedish television market.
- Main commercial TV channels: TV 4 (20% market share in 2015), TV3, Kanal 5, Sjuan, TV6 and TV8.
- About 80% of all Swedes watch television daily (average of 2 hours). Comparing it with other European countries, Swedes spend less time watching traditional television.

Radio

- Sveriges Radio is the dominant player with 75% share of the radio audience market. 3ational channels: P1 (news, culture and public affairs), P2 (classical music) and P3 (youth); regional channel P4 (news and current affairs in 25 regions, targes 40+ age group). Local commercial radio: MTG Radio and Bauer Media.
- On average, 70% of the population tune in to the radio – whilst this proportion has been stable, the average time spent listening has declined to a daily average of 2 hours in 2015. One of the potential reasons is music streaming services such as Spotify.

Newspapers

- Nearly 90% of adults in Sweden read at least one newspaper a day which brings Swedish print media consumption close to the top worldwide.
- There are about 150 printed papers in Sweden, almost all with an online edition. Roughly 60 are published only once or twice a week with a low circulation.
- Daillies published in the three metropolitan areas of Stockholm, Göteborg and Malmö: Dagens Nyheter, Göteborgs-Posten and Sydsvenskan. The tabloids: Aftonbladet (the biggest Swedish newspaper), Expressen incl. local editions in Göteborg (GT) and Malmö (Kvällsposten). All published daily with focus on entertainment, sports, culture and opinion pieces.
- Regional and local subscribed morning papers: published at least 3x/week with the biggest being Helsingborgs Dagbladet, Dalarnas Tigningar, Nerikes Allehanda.
- Low frequency papers published 1x or 2x/week include local papers in the metropolitan areas and small regional and local papers.
- Freely distributed newspapers: around 100, distributed often on weekly basis, the biggest is Metro distributed 5x/week.
- Some of the newspapers have travel sections e.g. Svenska Dagbladet publishes one every Sunday.

Source: Consulate General of Sweden, Sweden – Media Landscape by European Journalism Centre EJC 2017

2.4 Reaching the consumer: magazines and online media

Magazines

- There are more than 2,000 periodicals in the Swedish market including many small titles. 350 of them are audited by the national magazine organisation. There are two main categories: popular press where the most successful magazines are about home and gardening and organisational press where the most successful titles are about general business issues.
- The readership of periodicals is stable: 25% of Swedes read some popular magazine/day, half of the Swedes read one/week. Organisational press is read by around 10% of Swedes/day, 30% of Swedes/week.
- Swedish consumer travel magazines include Vagabond, Allt Om Resor and Res.

Online media

- The Internet is now seen as the most important information source for Swedes ahead of TV, daily newspapers and radio.
- Social Media: The use of social networks continues to increase (75% currently), now more than half use it daily. Facebook, Instagram and Youtube are the most used networks. Half of Swedes have a Facebook account. Twitter has decreased in use.
- Print goes digital: Digital newspapers: in 2016 approx. 22% of the Swedish population lived in a household which had a digital newspaper subscription. The digital-only market is dominated by Dagens Hyheter (75,000 digital subscribers) and Svenska Dagbladet (40,000 digital subscribers). Aftonbladet is the most successful newspaper in terms of digital audience sales with about 250,000 subscribers in 2016.

Source: Sweden – Media Landscape by European Journalism Centre EJC 2017, Svenskarna och interenet 2016

2.4 Reaching the consumer: social media on holiday

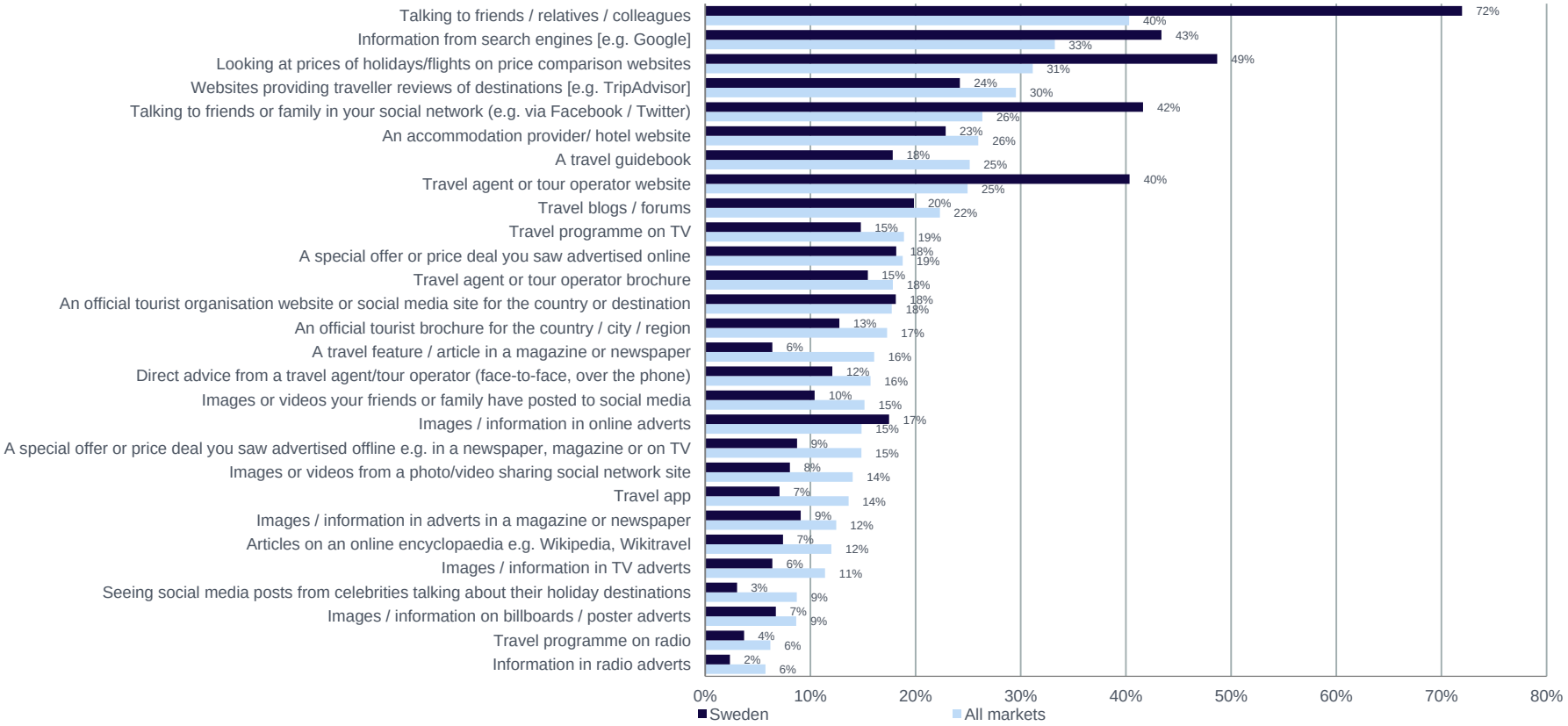
Use of social media on holiday

- The social media channels most used in the Swedish market are Facebook, Youtube, Google+, Instagram Twitter, and Snapchat.
- Almost half like to keep in touch with people at home and about one in three like to post/upload their holiday photos.
- 60% like to stay connected whilst they are on holiday and 67% regard a smartphone as essential whilst they are on holidays, below the all market average.
- 60% of Swedish travellers love to take photos when they are on holiday which is a lower proportion than in many other markets.
- 72% of Swedish travellers have shared holiday photos online or would like to do so and 51% have shared holiday video content or would like to do so. About half of the Swedish have already used location technology to find places to visit and a further 28% are interested in using it. Only about one in five enjoy writing reviews on social media of places they have been to on holiday and 37% place trust in reviews on social media from other tourists – fewer than in many other markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, *to enable meaningful comparisons)*

2.5 Perceptions of Britain

- The Swedish rate Britain highly for vibrant cities, contemporary culture and sport, but much less for natural beauty; Britain was rated 26th out of 50 nations on this attribute in 2016.
- Music and museums are the cultural products or services most strongly associated with Britain among the Swedish.
- A trip to Britain would be expected to be 'Exciting' and 'Educational' by the Swedish.
- Australia, USA and Italy are the destinations that the Swedish consider the 'best place' for delivering the things they most want from a holiday destination.
- Areas of strength for Britain include being somewhere to 'watch a sporting event', 'good shopping', visit a place with 'lots of history', ease of getting around, 'meeting the locals' and see 'famous sites' while very few consider Britain as the best place for 'food & drink'.
- Activities that appeal to potential Swedish visitors include dining by the fire in a cosy Welsh pub and shopping on London's Oxford Street.

Areas of strength for Britain:
Vibrant cities, contemporary culture and sport

Source: GfK Anholt Nation Brands Index 2013 and 2016, Arkenford 2013

2.5 Perceptions of Britain

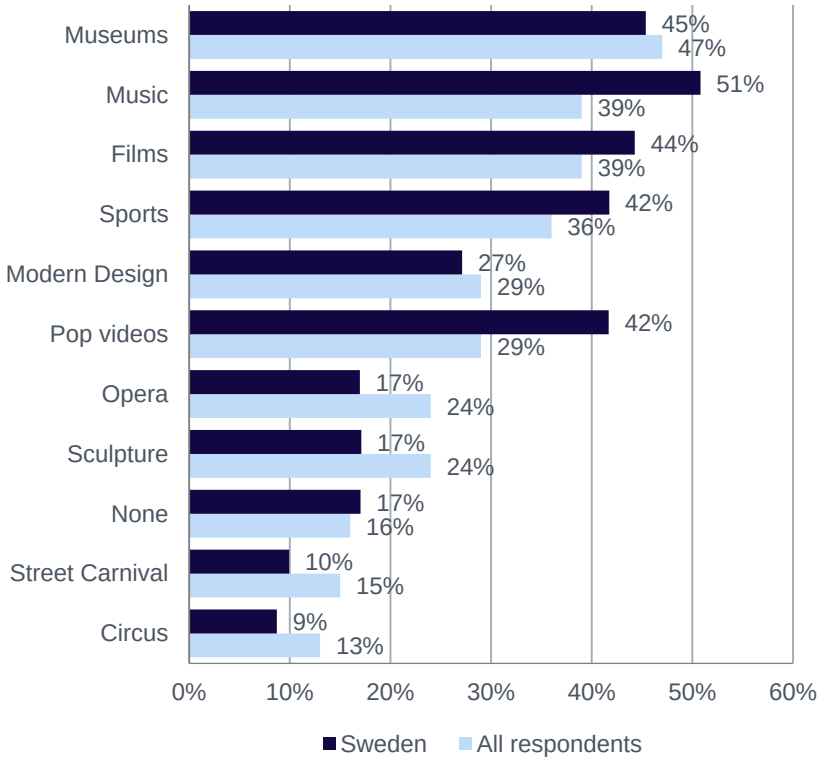
Britain's ranking (out of 50 nations)

Measure	Swedish respondents	All respondents
Overall Nation Brand	3	3
Culture (overall)	3	5
The country has a rich cultural heritage	8	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	4
The country excels at sports	3	5
People (overall)	3	7
If I visited the country, the people would make me feel welcome	8	12
Tourism (overall)	4	5
Would like to visit the country if money was no object	6	5
The country is rich in natural beauty	26	24
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	2	4

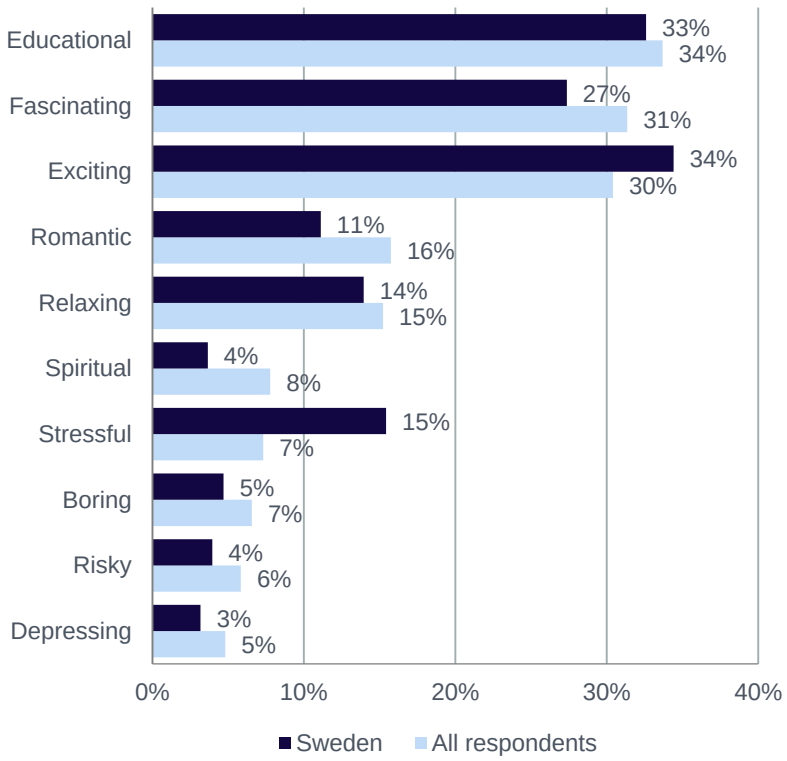
Source: GfK Anholt Nation Brands Index 2016

2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: GfK Anholt Nation Brands Index 2016

2.5 Perceptions of Britain

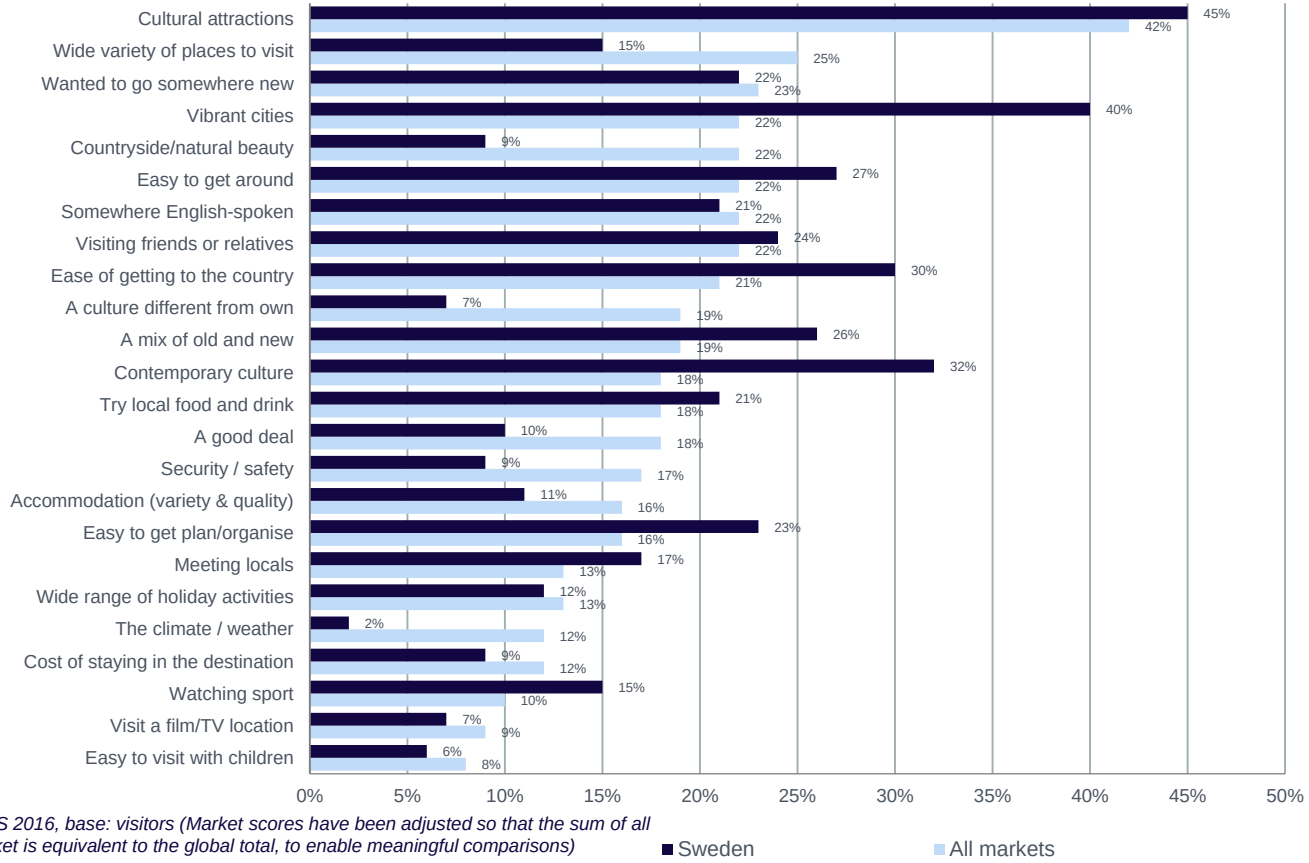
Holiday wants and % saying destination is best place for…

Importance		GB	FR	IT	AU	US	GE
5.97	Have fun and laughter	16%	10%	19%	14%	22%	6%
5.76	Enjoy the beauty of the landscape	18%	30%	42%	42%	25%	12%
5.75	Do something the children would really enjoy	18%	19%	17%	26%	42%	10%
5.74	Do what I want when I want spontaneously	17%	13%	19%	19%	21%	12%
5.72	Enjoy peace & quiet	8%	18%	22%	21%	8%	4%
5.66	Enjoy local specialities (food and drink)	10%	47%	54%	11%	14%	12%
5.61	Offers good value for money	19%	10%	13%	8%	17%	15%
5.61	The people are friendly and welcoming	23%	13%	24%	35%	29%	12%
5.60	Chill/ slow down to a different pace of life	9%	10%	21%	15%	10%	3%
5.55	Experience things that are new to me	11%	7%	15%	39%	30%	3%
5.52	Explore the place	10%	16%	21%	19%	20%	3%
5.45	Soak up the atmosphere	23%	24%	39%	25%	30%	12%
5.44	Have dedicated time with my other half	27%	39%	46%	31%	29%	19%
5.42	Broaden my mind/ Stimulate my thinking	15%	18%	27%	36%	37%	9%
5.39	Get some sun	3%	18%	37%	56%	25%	2%
5.33	See world famous sites and places	29%	32%	43%	22%	35%	14%
5.30	Visit a place with a lot of history/historic sites	34%	37%	46%	12%	19%	22%
5.22	Enjoy high quality food and drink (gourmet food)	6%	62%	60%	10%	10%	9%
5.19	It offers unique holiday experiences	20%	22%	29%	54%	48%	14%
5.03	Experience activities/places with a wow factor	11%	18%	26%	57%	44%	9%
4.91	Meet the locals	29%	8%	17%	22%	15%	5%
4.85	Get off the beaten track	10%	9%	17%	33%	13%	5%
4.80	Be physically healthier	10%	16%	18%	22%	16%	7%
4.77	Provides a wide range of holiday experiences	23%	23%	29%	40%	49%	14%
4.71	A good place to visit at any time of year	16%	14%	19%	34%	36%	13%
4.69	Feel connected to nature	15%	14%	16%	48%	12%	9%
4.63	Revisit places of nostalgic importance to me	23%	14%	19%	17%	17%	13%
4.59	Easy to get around by public transport	33%	15%	12%	10%	21%	21%
4.42	Good shopping	42%	25%	29%	10%	53%	13%
4.37	Feel special or spoilt	13%	10%	23%	15%	23%	6%
4.15	Visit places important to my family's history	8%	13%	6%	9%	21%	12%
3.82	Meet and have fun with other tourists	10%	8%	8%	27%	13%	16%
3.78	Do something environmentally sustainable/ green	12%	4%	8%	10%	14%	13%
3.63	Experience adrenalin filled adventures	8%	20%	11%	43%	28%	8%
3.48	Party	16%	16%	21%	11%	35%	28%
3.45	Do something useful like volunteering to help on a project	9%	10%	20%	19%	9%	3%
3.36	To participate in an active pastime or sport	25%	22%	27%	31%	30%	27%
3.16	Go somewhere that provided lots of laid on entertainment/nightlife	27%	28%	28%	26%	52%	16%
3.10	Watch a sporting event	49%	13%	40%	12%	39%	19%
2.50	Fashionable destination	17%	16%	20%	28%	33%	7%

Source: VisitBritain/Arkenford 2013

2.5 Perceptions of Britain

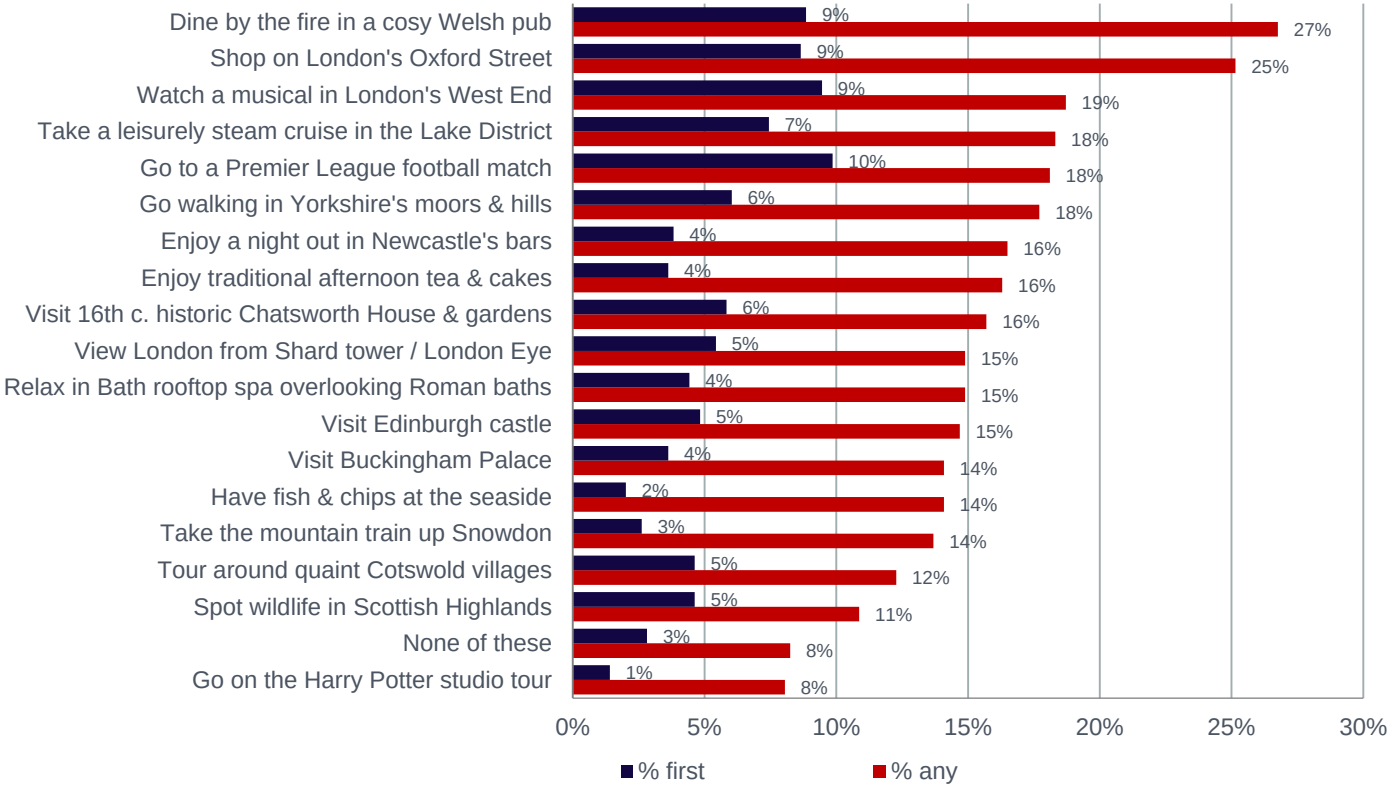
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.5 Perceptions of Britain

Sought-after Britain activities



Source: GfK Anholt Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice

Chapter 3:

Access and travel trade

3. Access and travel trade

- Access to Britain is easy. 98% of Swedish visits were made by plane.
- Monthly airline seat capacity from Sweden to Britain has grown since 2014. Norwegian and Norwegian Air International combined make up more than a quarter of annual seat capacity between Sweden and Britain in 2016, followed by British Airways, SAS and Ryanair.
- The travel industry in Sweden is made up of Tour operators (OTAs/Charter/Specialist), Carriers, MICE & Travel Agents.
- Britain product can mainly be found:
  1. Charter City Breaks by major charter tour operators (London dominates, Edinburgh, Manchester)
  2. Coach touring by coach operators / medium sized tour operators
  3. Niche programmes by specialist operators (Gardens, Food & Drink, Sports)

98%

of visits to Britain from Sweden came by plane in 2016

Source: Apex Rdc 2016

3.1 Access: key facts

- 98% of Swedish visits to the UK were made by plane. It is a short non-stop flight: usually about 1.5-2.5 hrs flight time.
- Annual seat capacity was fairly stable since 2011 and grew again to about 1.8 million available airplane seats in 2016.
- Most flights come in through the Stockholm – London corridor.
- Norwegian and Norwegian Air International combined account for more than a quarter of annual seat capacity between Sweden and Britain in 2016, followed by British Airways, SAS and Ryanair.
- Swedish visitors departing Britain by air pay £13 in Air Passenger Duty.
- A very small proportion of Swedish inbound visits come to the UK via the Channel Tunnel (5,000 visits) or across the sea (less than 8,000 visits) in 2016.

Source: International Passenger Survey by ONS, Apex RdC 2016, non-stop flights only

Almost all Swedish visitors travel to the UK by plane.

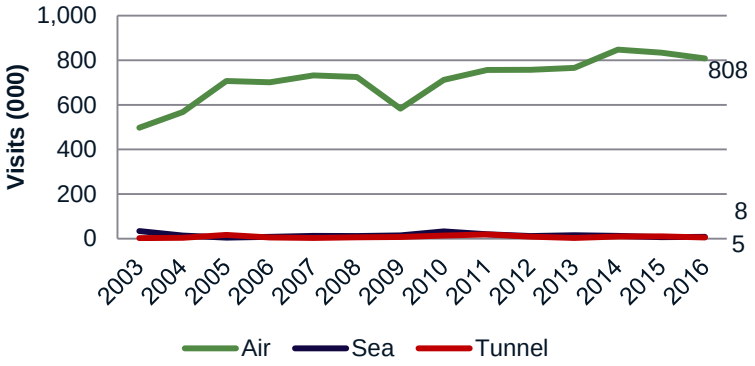
Access to Britain

Measure	2016*
Weekly aircraft departures	196
Weekly aircraft seat capacity	33,363
Airports with direct routes in Sweden	4
Airports with direct routes in Britain	5

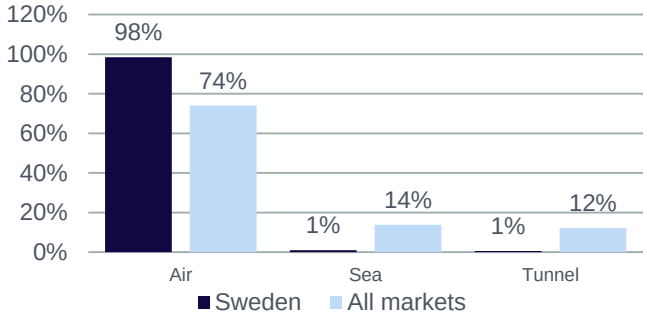
**Data in this table excludes routes to Cambridge and from Malmo and Ostersund which account for a very small share of annual capacity.*

3.1 Access: mode of transport

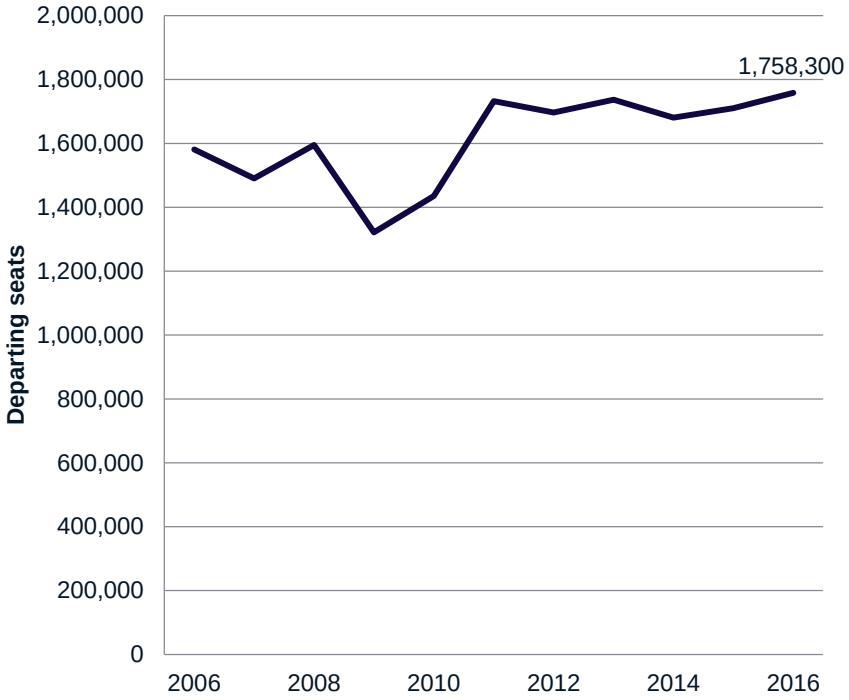
Visits by mode of transport



Annual share by mode (2016)



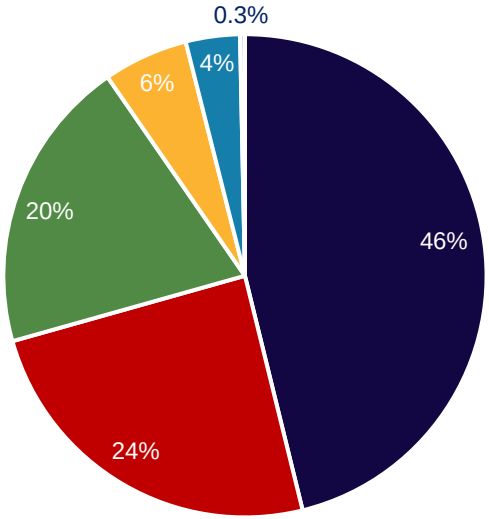
Origin airport annual seat capacity



Source: International Passenger Survey by ONS, Apex Rdc, non-stop flights only

3.1 Access: capacity

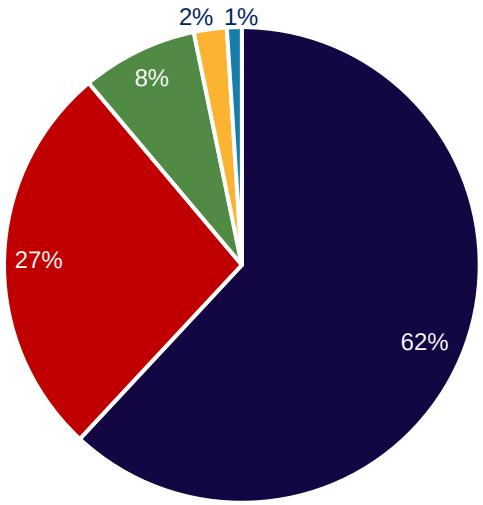
Destination airport annual seat capacity



- London - Heathrow
- London - Gatwick
- London - Stansted
- Manchester International
- Edinburgh
- Cambridge

Source: Apex Rdc 2016: non-stop flights only

Origin airport annual seat capacity

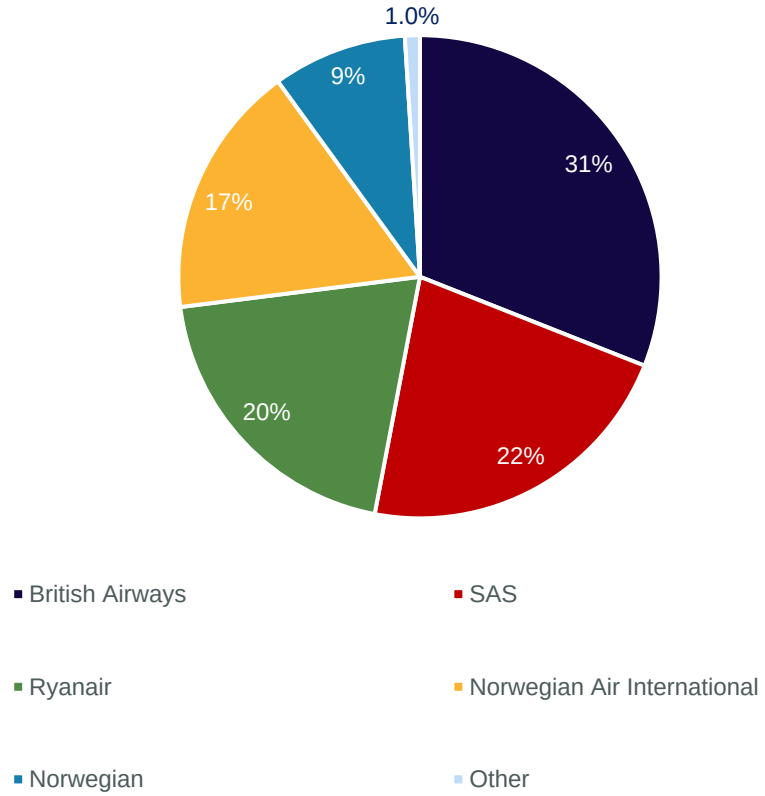


- Stockholm - Arlanda
- Gothenburg - Landvetter
- Stockholm - Skavsta
- Stockholm - Vasteras/Hasslo
- Other*

*Airports with less than 2% annual seat share grouped in other: Malmo and Ostersund

3.1 Access: capacity

Airline seat capacity by carrier (2016)



Source: Apex Rdc 2016: non-stop flights only

3.2 Travel trade: general overview

- The key centre for travel trade is Stockholm; there are some opertors in Gothenburg and Malmo. Malmo could also be paired with a visit to neighbouring Copenhagen if you also cover Denmark.
- The planning cycle varies, so it is possible to do business in Sweden throughout the year.
- The Swedish travel trade can be split into these broad categories: charter operators, business travel and MICE operators, online operators and retail travel agents.
- Some operators are pan-Nordic as well, so it is possible to reach the whole region via a single contact.
- Swedish visitors who booked their travel to Britain separately to accommodation were most likely to book directly with the airline/train/ferry operator (67%). One in three, however, chose to book through a travel agent/tour operator/travel comparison websites. The share of the latter rises to about half of the Swedish visitors who booked accommodation stand-alone and 66% for those who booked a holiday (accommodation and travel combined).

Source: VisitBritain/IPSOS 2016, base: visitors

Swedes value building business relationships

3.2 Travel trade: Swedish tour operators

Top ten operators in Sweden in 2015/2016

Top Ten Tour Operators	Turnover SEK (000s)
TUI Sverige AB	11,442,263
Thomas Cook Northern Europe AB	10,628,170
Ving Sverige AB	5,949,175
Ticket Leisure Travel Group AB	5,758,667
DER Touristik Nordic AB/Apollo Resor	5,362,115
Uvet Nordic AB/Flypoolen, Flightfinder, Doodle, and Travelstore	1,594,270
Etraveli AB	1,321,171
Primera Travel Sweden AB/Solresor	1,027,855
Resecentrum i Stockholm AB	832,911
Resia Travel Group AB	808,534

Source: Largest companies.net

TOP intermediaries in the Nordic region

Top intermediaries in the Nordic region
KulturRejser (SE/DK)
Albatros Travel
Airtours
TEMA Resor (Jambo Tours Scandinavia AB
RK Travel (mainly SE/NO)
eTraveli
Apollo Travel Group

3.2 Travel trade: Swedish holidays

Public holidays

National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
6 January	Epiphany
30 March	Good Friday
1 April	Easter Sunday
2 April	Easter Monday
1 May	Labour Day
10 May	Ascension Day
20 May	Pentecoast Sunday
6 June	National Day
23 June	Midsummer Day
3 November	All Saints Day
25 December	Christmas Day
26 December	Second Day of Christmas

Date	Local/School Holiday	Area
Week 7	Sportlov	Gothenburg
Week 8	Sportlov	Malmo
Week 9	Sportlov	Stockholm
Week 44	Oktoberlov	

Please note that most Swedish businesses close for half a day before public holidays.

3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 17:00 with a one hour lunch break, usually at noon.
- When introduced expect to shake hands. Use first names rather than last names.
- Keep meetings short and have an agenda.
- Follow up quickly on any action points.
- Mid June to mid August can be difficult to arrange meetings/events etc due to summer school holidays and long vactions.
- Swedes generally speak excellent English – so language is not an issue.
- Swedes do not like hard sales, its very much about listening and building up a relationship.

Sales calls

The Swedish trade structure is consolidated and closely connected. The big players are carriers and tour operators; 4 major charter tour operators dominate mainstream leisure travel, while the mid size and niche operators are more relevant for Britain.

- Swedes are not used to hierarchy and tend to be quite informal, but this does not mean unprofessional.
- Swedes are not used to 'the hard-sell', so a gentle, friendly approach will usually work better.
- Swedes are generally perceived as being fairly quiet, they tend to listen and observe before commenting.
- Swedes are generally in touch with British current affairs, humour and culture, so don't be afraid to bring it into a discussion.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Swedish trade attend the VisitBritain's ExploreGB workshop & VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market and ITB.

3.3 Caring for the consumer

Caring for the consumer

- Cleanliness is very important. Swedes are used to wooden or tiled floors. Budget accommodation can be fine, but they are likely to expect en-suite facilities.
- Swedes often have high expectations due to relatively high standards of hotels and decent prices at home.
- Swedes tend to be impressed by evidence of environmental care (for example Green schemes).
- Whilst many Swedes have good command of English signage and information in their native language could make them feel more welcome. Currently this fell below expectations for about half of the Swedish visitors to the UK.

Source. International Passenger Survey by ONS 2016

Language basics

English	Swedish
Please	N/A
Thank you	Tack
Yes	Ja
No	Nej
Sorry! (apology)	Förlåt
Excuse me!	Ursäkta mig
Sorry, I do not speak Swedish.	Ursäkta mig, jag talar inte svenska.

3.3 Caring for the Consumer

Caring for the Consumer:

- Swedish perceptions of and satisfaction with British food tend to be lower than average.
- At home, Swedes tend to eat lunch at 12 noon and dinner at 6pm but they are happy to adapt this when travelling.
- Breakfast in Sweden tends to be continental breakfast, often rolls with cheese and ham. Swedes travelling in the UK will often happily eat an English breakfast but perhaps not every day.
- Swedes tend to like strong coffee and not being able to get decent coffee is often a source of complaint.
- Swedes are comfortable with and used to paying with a credit card while in Britain.

Source. GfK Anholt Nation Brands Index, Arkenford 2013, VisitBritain/IPSOS 2016

3.3 Caring for the consumer: Swedish language tips

Language tips for arrival and departure

English	Swedish
Hello	Hej
My name is…	Jag heter
Welcome to Britain	Välkommen till Storbritannien
Pleased to meet you!	Trevlig att träffas!
How are you?	Hur mår du?
Enjoy your visit!	Trevlig resa!
Goodbye	Hej då
Did you enjoy your visit?	Hade du en trevlig resa?
Have a safe journey home!	Trevlig resa!
Hope to see you again soon!	Hoppas vi ses igen snart!

3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain‘s competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Swedish or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain visitbritain.org/understanding-international-visitors
- Technology and social media visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

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