Market and Trade Profile: Sweden

October 2021

Destination Bristol ©Gary Newman

Overview

- **‘Chapter 1: Inbound market statistics’** provides insights on key statistics about Swedish travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **‘Chapter 2: Experiences and perceptions’** features details about what visitors from Sweden are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the Swedish in general are also highlighted.
- **‘Chapter 3: Understanding the market’** takes a close look at consumer trends in Sweden, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Swedish consumers are indicated, too.
- **‘Chapter 4: Access and travel trade’** shows how people from Sweden 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 in the appendix.

Please note that most of this report refers to the market conditions for travel from Sweden to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

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Executive Summary

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1: Inbound market statistics

Chapter summary

- Despite the severe shorter-term impact of the COVID-19 pandemic, the Swedish outbound market is forecast to account for almost 20 million trips abroad with at least one overnight stay by 2030. In 2019, the UK was the fifth most popular destination behind Spain, Denmark, Norway and Germany for such trips. In the current forecast, Swedish visits to the UK are set to break the 1 million mark and reach close to £700m in value by 2030.
- The Swedish rank globally in 25th place for international tourism expenditure with more than US$14.4bn spent on outbound travel in 2019.
- In 2019, the UK welcomed around 789,000 visits from Sweden contributing £400 million in visitor spending across the UK. On average, visitors residing in Sweden spent £507 per visit in the UK; on holiday this rises to £641 per visit.
- The Swedish market offers excellent, very balanced seasonal spread.
- London is the leading destination for a trip to the UK but the Scotland and the South East are also popular based on average nights spent in the UK in 2017-19.
- Almost four-in-five Swedish visits for holidays in the UK are repeat visits, well above the European average of 67%.

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics, Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects. Market-level inbound statistics have not been produced for full-year 2020; see p. 10 for more.

2019:
£400 million
Swedish visitor
spend in the UK

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2: Experiences and perceptions

Chapter summary

- Almost two thirds of Swedish visits to the UK feature dining in restaurants; more than half enjoy going to a pub. Close to three in five Swedish visits involve shopping, especially when on holiday.
- 58% of Swedish holiday visits involve sightseeing and half allow time in parks and gardens and more than two in five visit castles or historic houses or museums or art galleries.
- Outdoors activities like walking in the countryside or going for a walk, hike or ramble are also popular among Swedes, particularly when visiting friends/family. A third of Swedes like to socialise with locals while here.
- The Swedish rate the UK highly for vibrant cities, contemporary culture and culture overall, sports and built heritage, but less so for its natural beauty; the UK is rated 23rd out of fifty nations on this attribute.
- Music is the cultural product or service the Swedes most strongly associated with the UK, followed by films, and museums. They have an above-average propensity to attend the performing arts and visit literary, music, TV, or film locations while on holiday in the UK.
- Almost 36,000 Swedish visits involved watching football live.

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019 and 2020

Swedes rate the UK **first out of 50** countries for vibrant city life and urban attractions.

3: Understanding the market

Chapter summary

- 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.
- In a normal year, 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 of the trip. Most bookings are made online.
- More than a third of Swedes state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 81% of Swedes considered taking an international leisure trip in the next 12 months (fieldwork 23rd August – 6th September 2021), showing the strongest desire to travel abroad since the start of the tracker. Of them, 74% are considering Europe and 13% Britain.

Source: VisitBritain/IPSOS 2016, Tour Hebdo and Raffour Interactif/Opodo 2021, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021

Easy access from Sweden and British culture: the most important draws for Swedish holiday visitors

VisitBritain VisitEngland

4: Access and travel trade

Chapter summary

- 98% of Swedish visits to the UK are made by plane. It is a short non-stop flight: usually about 1.5-2.5 hrs flight time.
- Annual seat capacity grew in recent years prior to the pandemic and peaked in 2018, but eased in the latest year to almost 1.7m airplane seats in 2019, before it fell sharply by 68% in 2020 as a result of the COVID-19 pandemic.
- Most flights come in through the Stockholm - London corridor.
- Seat capacity on routes from Sweden to the UK was mainly served by SAS, British Airways, Ryanair and Norwegian in 2019.
- 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)

Source: Apex, International Passenger Survey by ONS

Almost all Swedes travel to the UK by plane.

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- Sweden is the UK's 15th largest source market in terms of visits and 21st most valuable for visitor spending (2019).
- In 2019, the UK was the 5th most popular destination of Swedish outbound overnight travel globally behind Spain, Denmark, Norway and Germany, ahead of France and Finland.
- In 2019, the UK welcomed around 789,000 visits from Sweden contributing £400 million in visitor spending across the UK. On average, visitors residing in Sweden spent £507 per visit in the UK; amongst those on holiday, £641 per visit.
- The Swedish market provides excellent, very balanced seasonal spread.
- London is the leading destination for a trip to the UK but Scotland and the South East are also popular based on average nights spent in the UK in 2017-2019.
- Almost four-in-five Swedish visits for holidays in the UK are repeat visits, well above the European average of 67%.
- 9% of Swedish visits were bought as part of a package or an all-inclusive tour, slightly below the all-market average. The majority of visits from Sweden to the UK are organised independently.

Swedes spent a total of £400 million in the UK on their visits. (2019)

Source: International Passenger Survey by ONS, Oxford Economics. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here.

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	14.4
Global rank for international tourism expenditure	25
Number of outbound overnight visits (m)	14.4
Most visited destination	Spain

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+17%	+1%	+42%
2009	673	3,659	282
2010	725	3,611	342
2011	793	4,318	411
2012	777	3,653	381
2013	745	3,952	419
2014	745	3,517	433
2015	822	3,805	505
2016	819	3,927	462
2017	816	3,629	445
2018	745	3,388	399
2019	789	3,709	400
Share of UK total in 2019	**1.9%**	**1.3%**	**1.4%**

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

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	789	+6%	15
Nights (000s)	3,709	+9%	18
Spend (£m)	400	+0%	21

Between January and March 2020, the UK welcomed 105,000 visits from Sweden (down 47% on the first quarter of 2019), worth £62 million (down 21% on the first quarter of 2019).* The COVID-19 pandemic already mildly impacted visitation from Sweden to the UK in the first quarter of 2020 as restrictions to counter the spread of COVID-19 in spring 2020 came into force.

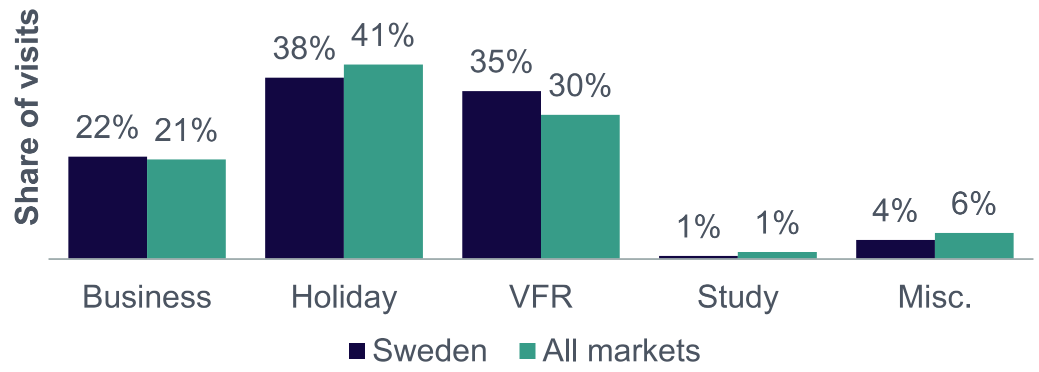
Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing **small base

Key metrics by journey purpose

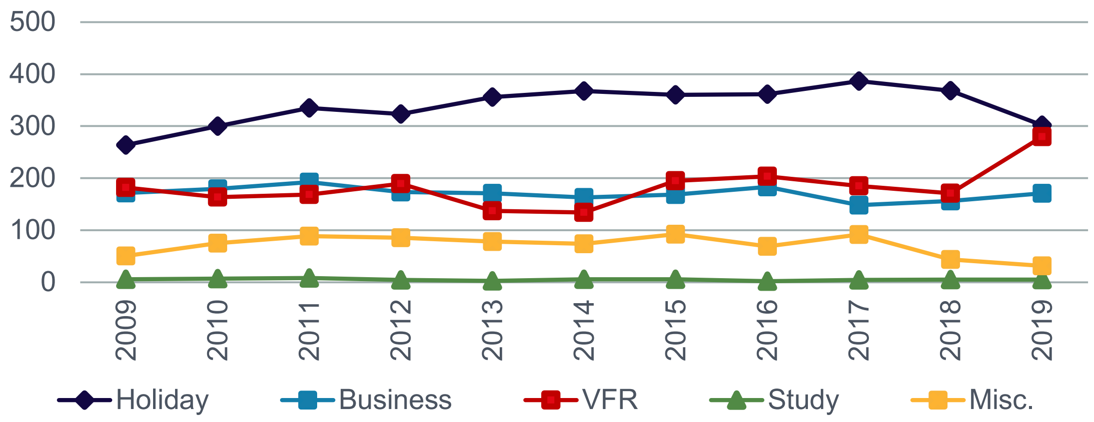
Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	4	£145	£641
Business	3	£168	£525
Visiting Friends/ Relatives	6	£61	£349
Misc.**	2	£193	£405
All visits	5	£108	£507

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



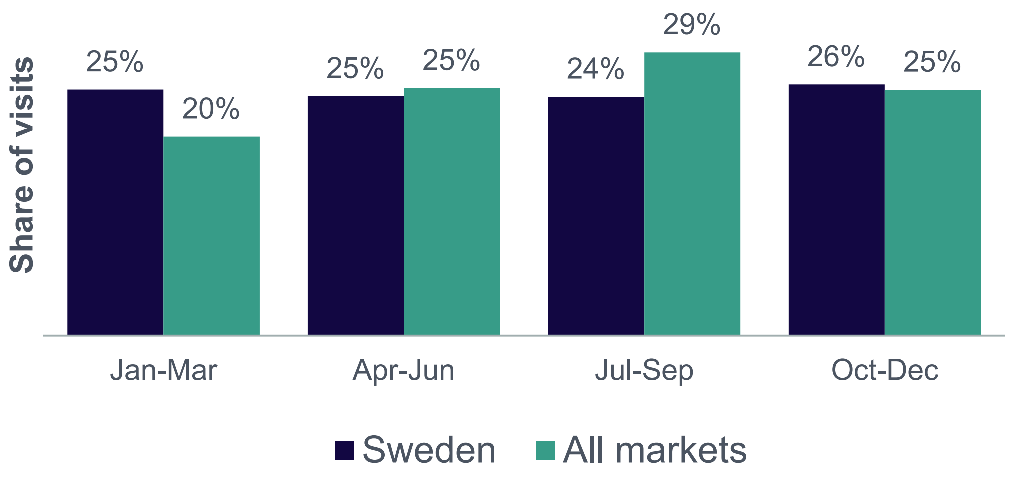
- The highest volume of Swedish visits to the UK is generated by leisure visits in 2019: 302,000 Swedish visits to the UK were made for holidays in 2019, worth a total of £193 million in visitor spending. The UK also welcomed a record 280,000 Swedish visits to friends/relatives residing here (up 63% year-on-year), worth a total of £98 million (up 81% on 2018). 2019 was the first year in which the value of visits to friends/relatives in the UK overtook the volume of business visits from Sweden to the UK. Swedish holiday visits set a volume record of 387,000 in 2017, but have not managed to keep up with this peak in subsequent years. They closed overall 22% lower than in 2017 in 2019.

- In 2019, 73% of visitor spending of Swedish visitors in the UK came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 22%.
- On average, visitors residing in Sweden spent £507 per visit in the UK; on holiday this rises to £641 per visit.
- 171,000 Swedish visits to the UK were made for business purposes (up 9% on 2018) worth a total of £90 million (up 36% on 2018). The number of business trips from Sweden to the UK was still almost 48,000 visits short of the peak of 219,000 business visits last seen in 2002, ahead of the financial crisis which occurred in 2008/2009.

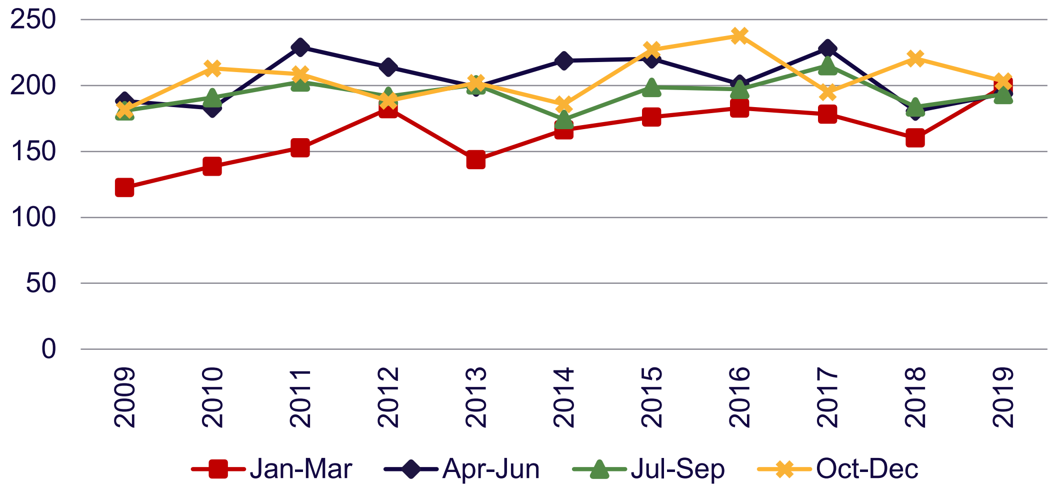
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

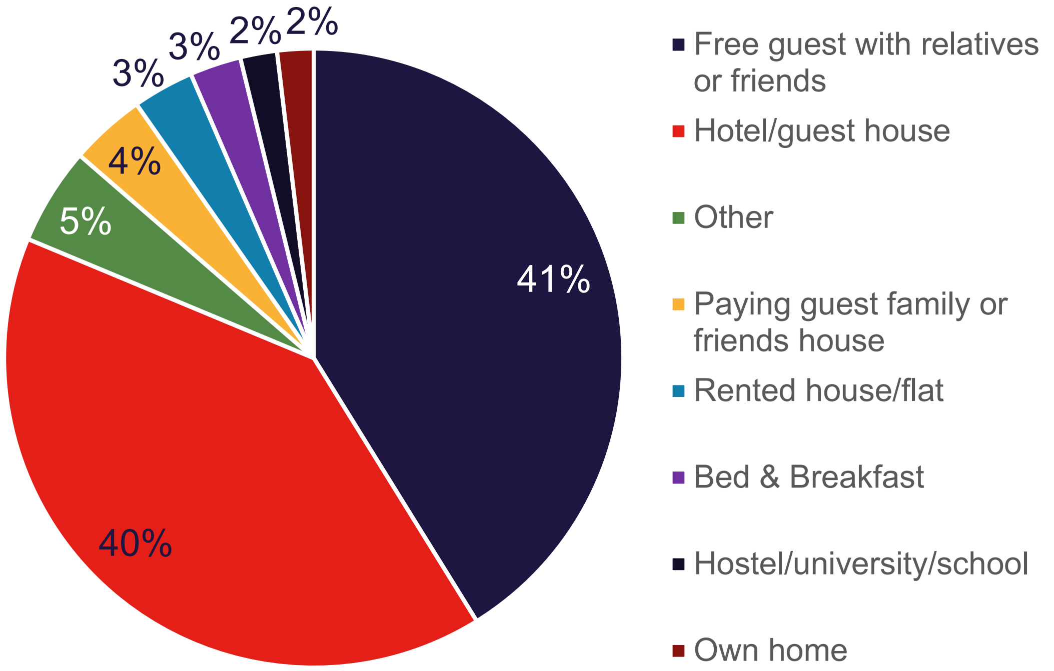


- Visits from Sweden to the UK have very balanced seasonal spread throughout the year. 26% of Swedish visits in 2019 were made in the October-December period, closely followed by one quarter each in the January-March period and the April-June period. Just under a quarter of visits were made in the summer months from July-September, which is a high season for many other source markets of the UK.
- 2019 was one of the most balanced years for seasonal spread in the past decade. Nonetheless, the first quarter of 2019 was the one which saw the strongest year-on-year volume growth setting a new record at 199,000 Swedish visits in the UK with visitor spending just short of the 2018 record with £78 million. The last quarter of 2019 saw the strongest year-on-year value growth making the 203,000 visits which occurred at this time of year worth a total of £117 million.

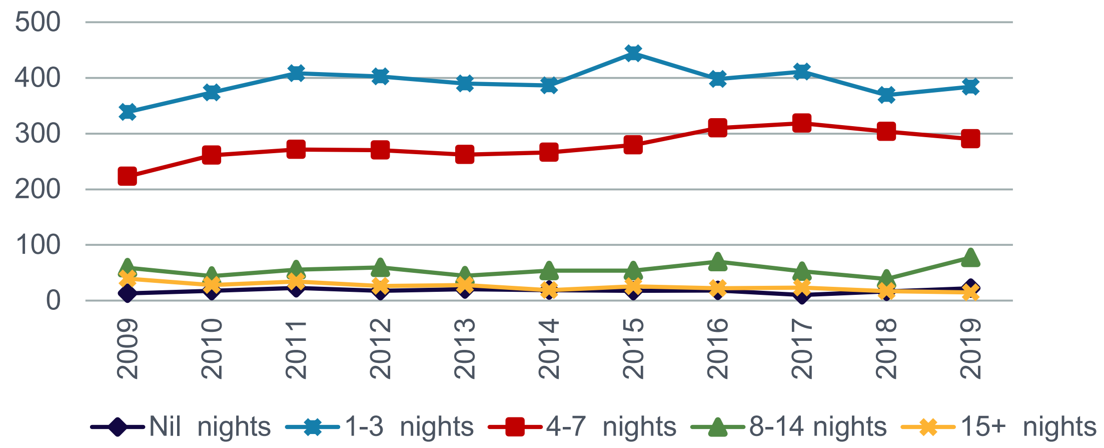
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

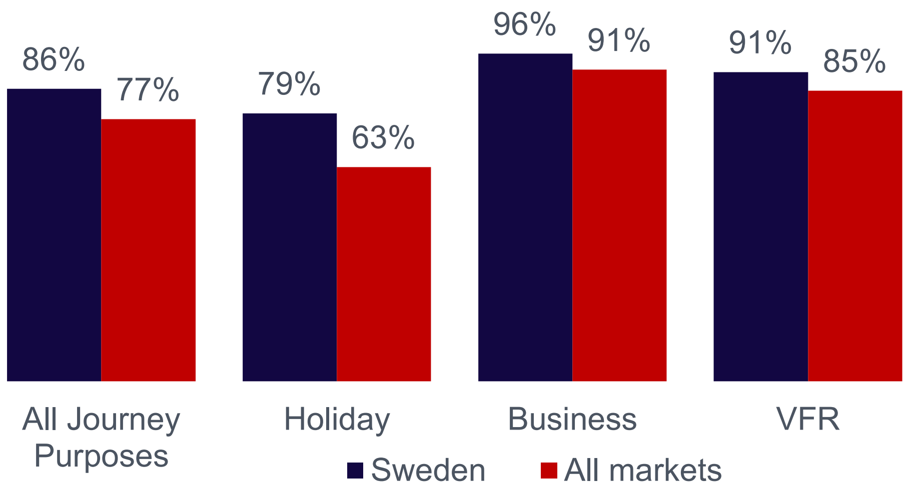


- Short trips of 1-3 nights and 4-7 nights are by far the most popular duration of stay amongst Swedish visitors. Combined they make up more than four in five Swedish visits.
- Two forms of accommodation dominate the picture with 41% of nights spent staying for free with relatives or friends and 40% of nights spent at a 'hotel/guest house'. 4% stayed with family and friends as paying guests and 3% each in rented houses/flats or at a bed and breakfast in 2019.

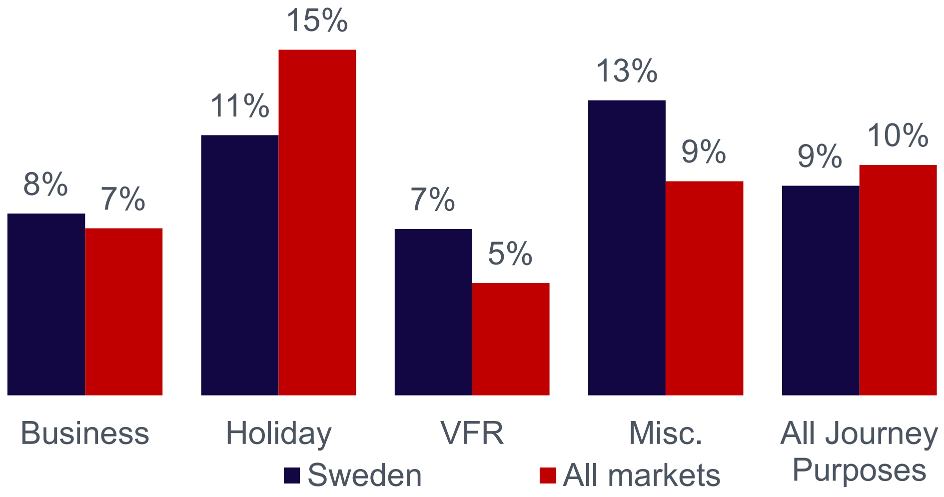
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 79% of holiday visits from Sweden to the UK in 2015 were made by repeat visitors (excl. UK nationals). These repeat visitors came on average of six times (a medium average visit frequency compared to other markets) and spent on average £3,271 in the UK in the past ten years.
- The highest proportion of repeat visitors were among those coming for business purposes (96%) or to visit friends and/or relatives who live in the UK (91%).
- Just under one in ten visits from Sweden are bought as a package or all-inclusive tour in 2019. Most visits to the UK are organised independently.

International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

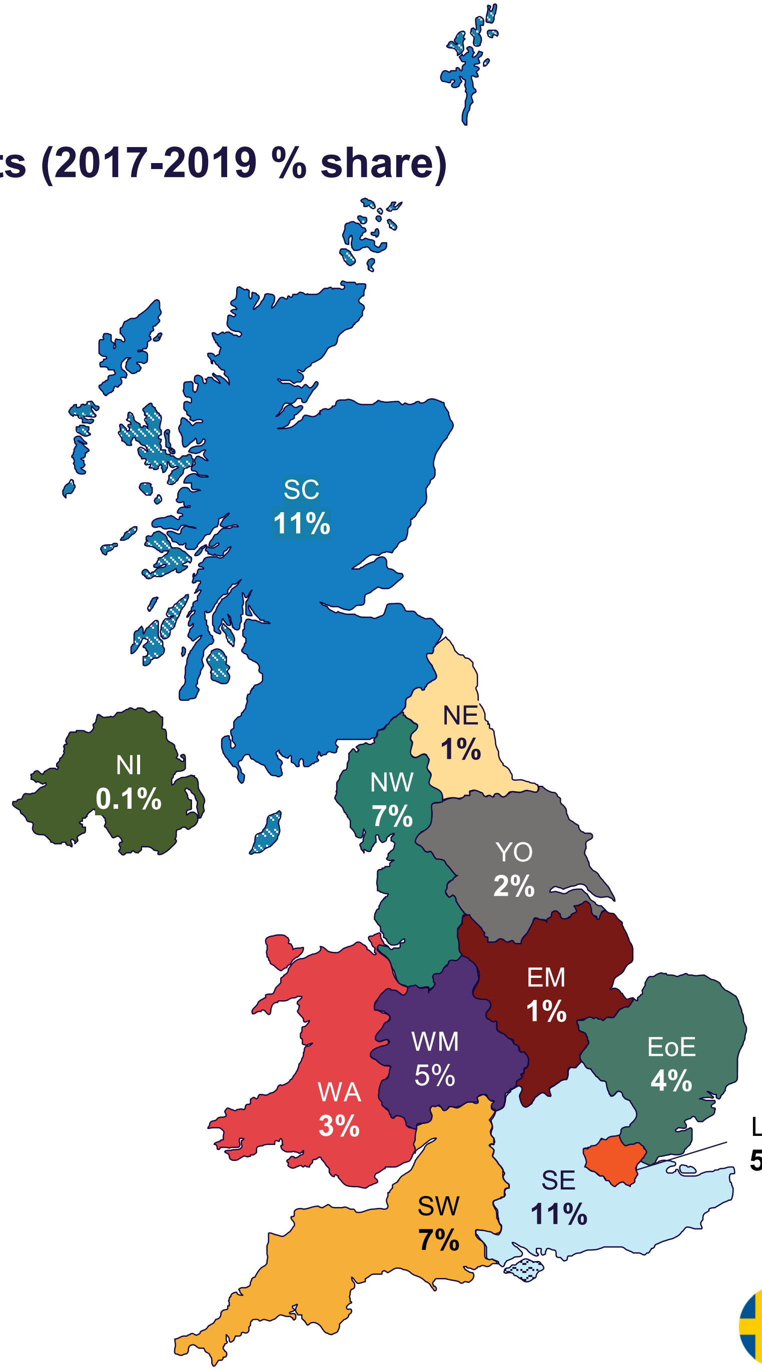
1.2 Getting around Britain

Annual visits to the UK (2017-2019 average)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	3,575	784	414
Scotland (SC)	391	77	44
Wales (WA)	94	16	7
Northern Ireland (NI)	3	0.5	0.3
London (LDN)	1,774	458	239
North East (NE)	25	8	2
North West (NW)	253	64	31
Yorkshire (YO)	57	16	5
West Midlands (WM)	165	30	17
East Midlands (EM)	49	13	4
East of England (EoE)	133	42	10
South West (SW)	243	36	18
South East (SE)	378	86	35
Nil nights (Nil)	N/A	16	1

Source: International Passenger Survey by ONS

Nights (2017-2019 % share)

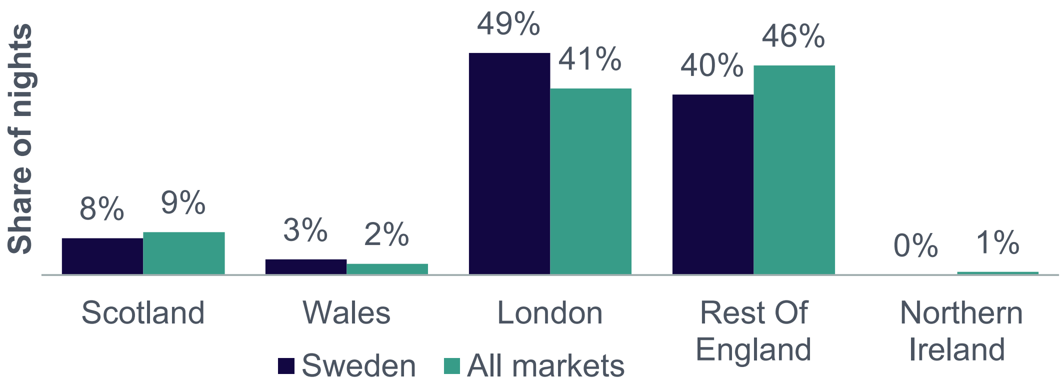


1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	458
Edinburgh	54
Manchester	32
Liverpool	18
Cambridge	18

Regional spread 2019

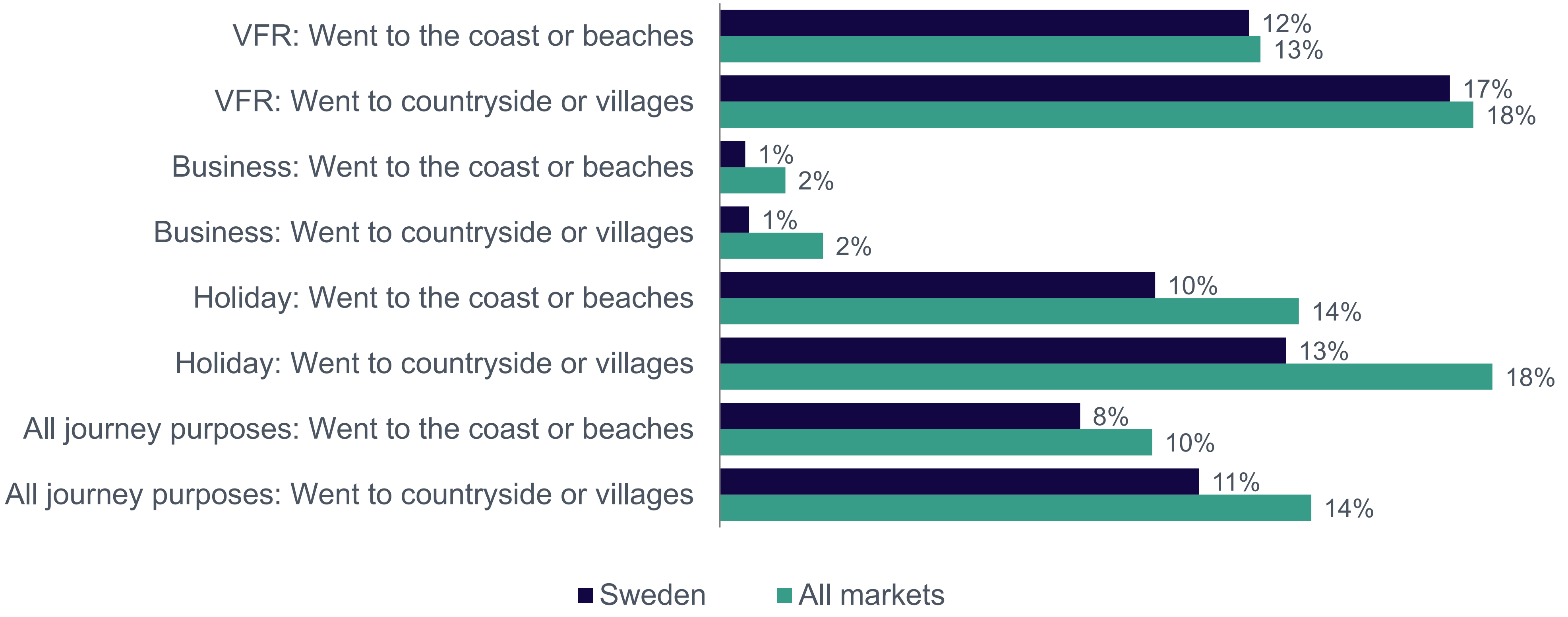


Source: International Passenger Survey by ONS

- London is the leading destination for a trip to the UK, accounting for half of all Swedish visitor nights (above the all-market average) based on the nights spent in the UK (based on 2017-2019 average).
- Scotland and the South East are also popular with more than one in ten Swedish visitor nights spent in each of the regions (11% in each region) in the same timeframe (2017-2019 average).
- In 2017-2019, London welcomed an average of 458,000 visits from Sweden worth £239 million.
- Swedish visits have a slightly below average propensity to feature rural and coastal areas of Britain. Visits to friends and relatives who reside in Sweden are most likely to feature activity in such areas.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

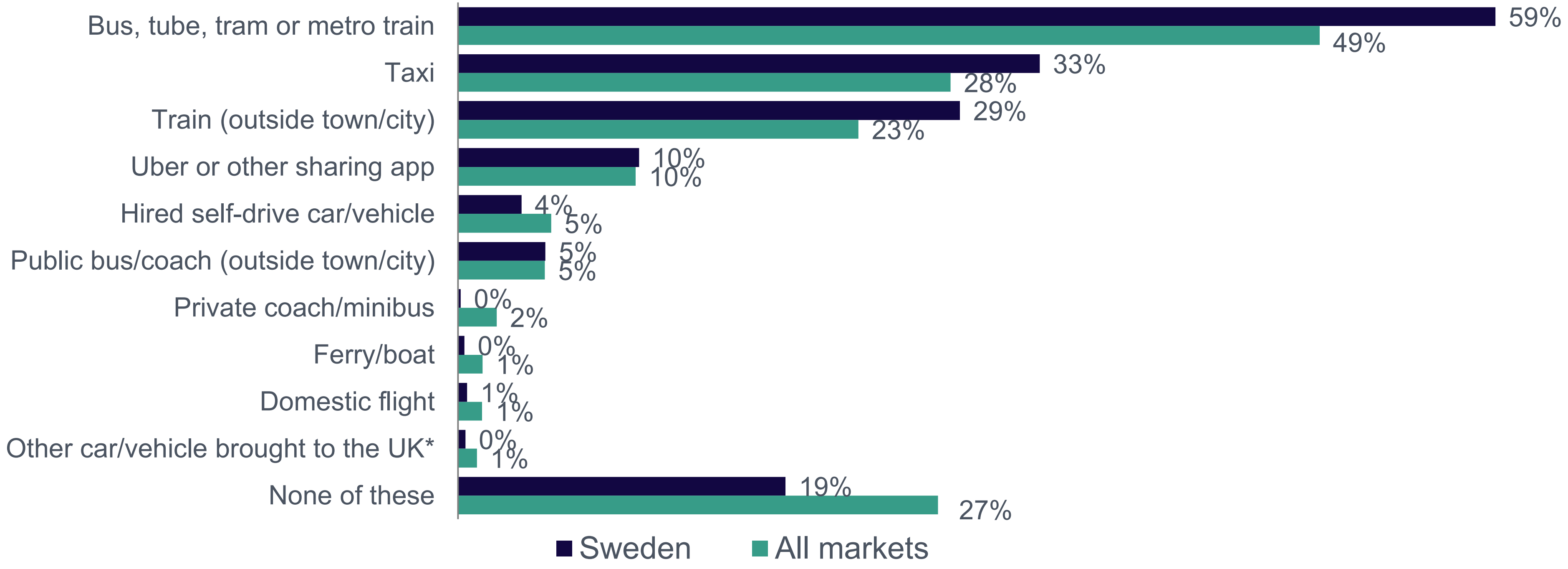


- More than one in ten Swedish visits are likely to go to the countryside or villages as part of their visit to the UK and almost one in ten to the coast or beaches. The propensity is higher among those visiting friends or relatives or those on a holiday in the UK.

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

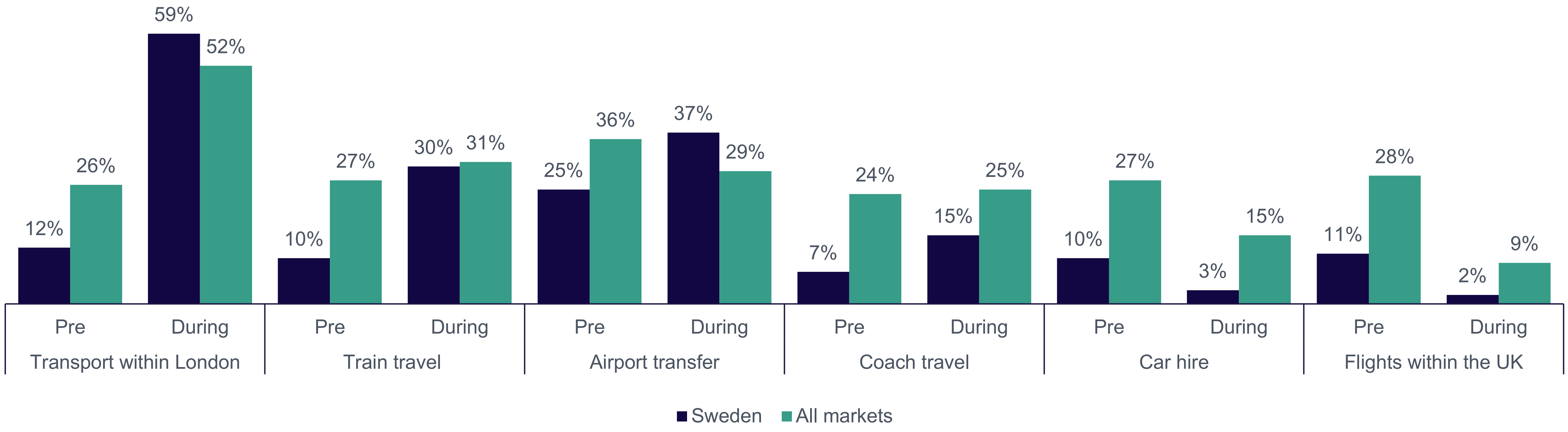


- Almost three-in-five of the Swedish have a propensity to use bus, tube, tram or metro trains during their visit in the UK.
- Swedish visitors are also comfortable with taking other internal modes of transport; one-in-three use a taxi and almost three-in-ten take trains (outside town/city), both higher than the all-market average.

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for “car/vehicle you/group brought to the UK”

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- The majority of Swedish respondents buy their tickets for transport in Britain whilst they are here (with the exception of car hire and internal flights which have a higher share of pre-booking before arrival), especially Tube, and train travel tickets.
- While more Swedes buy tickets for airport transfers while in Britain (37%), this mode of transport has the highest share of booking before arrival among the transport options surveyed (25%).

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

1.3 Visitor demographics

Visitor characteristics

- The age cohort of 25-54 makes up almost two thirds of visits from Sweden to the UK. In 2019 the 25-34 age group set a new visits record and has also seen the largest growth in the 10-year period to 2019. This growth is then followed by the cohort of those aged 65+.
- The highest spend per visit was registered for the age cohorts of 55-64 and 45-54 with average spend per visit of £579 and £520 respectively.
- There is a tendency of more men visiting the UK than women, especially among business visitors, but the picture is balanced among holiday visitors.
- 30% of visits made to see friends and relatives (VFR) residing in the UK are by British nationals.
- Close to one in three visits from Sweden are by travellers on their own or by those who visited with their spouse or partner respectively. Swedish visitors have an above-average propensity to travel with adult friends or family members.
- The largest proportion of Swedish visitors who came to the UK reside in Södermanland (incl. Stockholm), Bohuslän and Skåne.

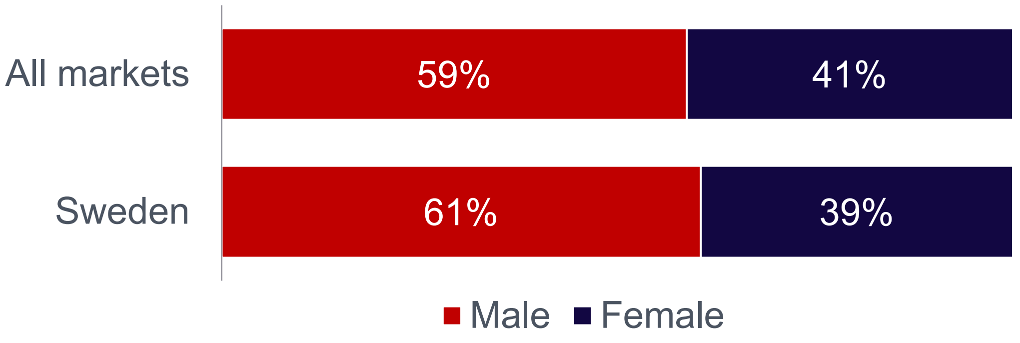
79%

of Swedish holiday visitors have been to the UK before*

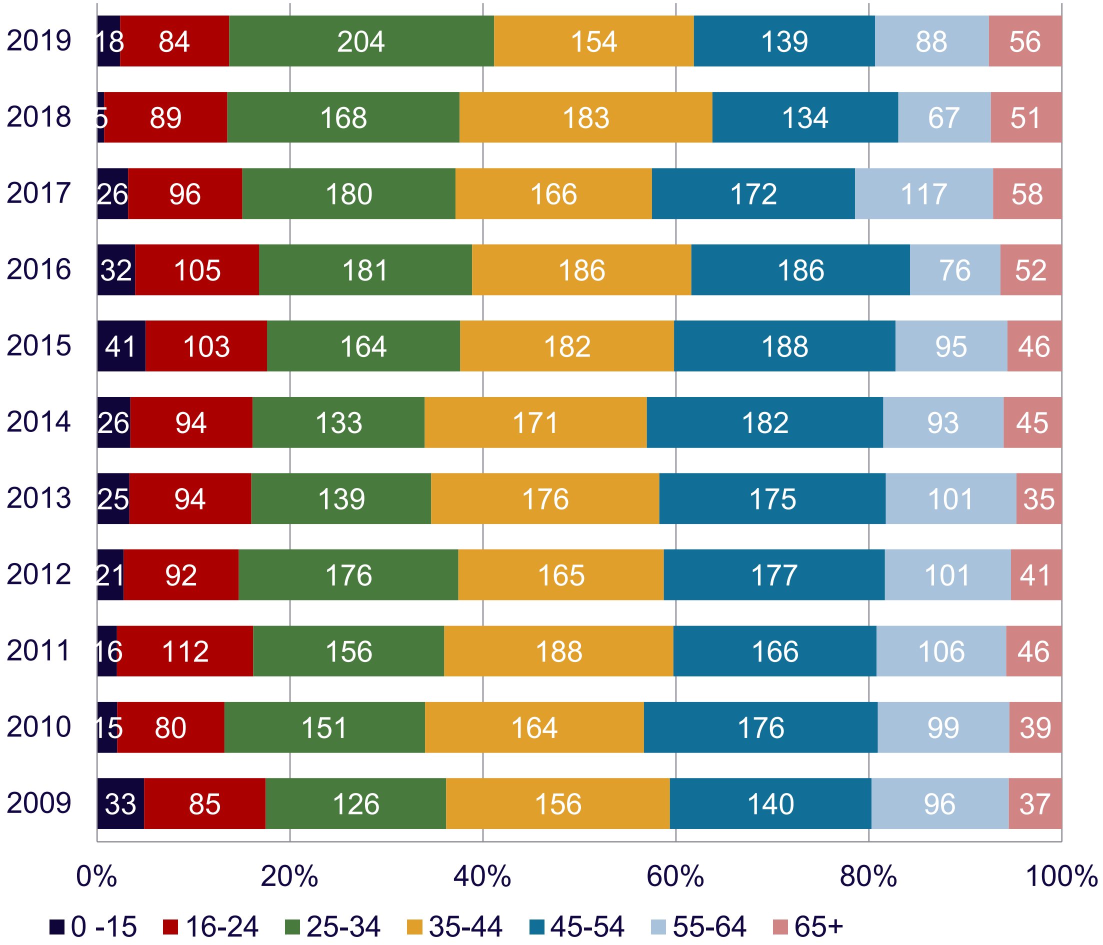
Source: International Passenger Survey by ONS, *IPS 2015

1.3 Visitor demographics: gender and age groups

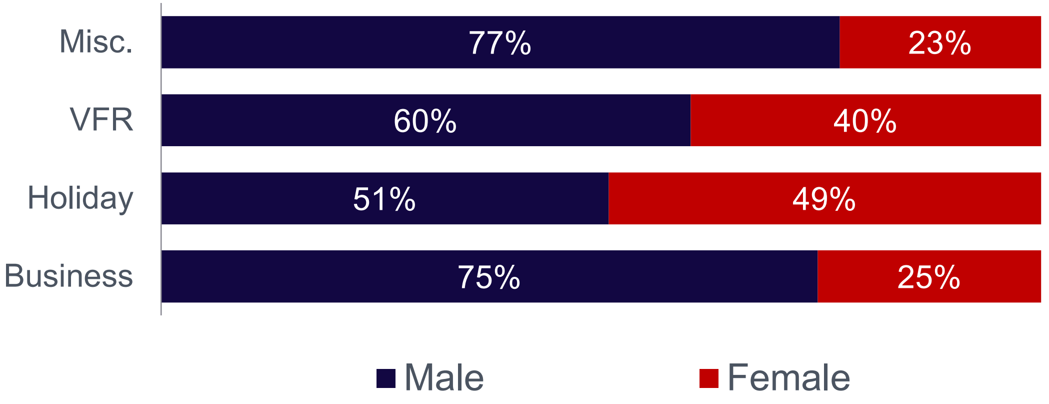
Gender ratio of visits (2019):



Age group trend (visits in 000s)



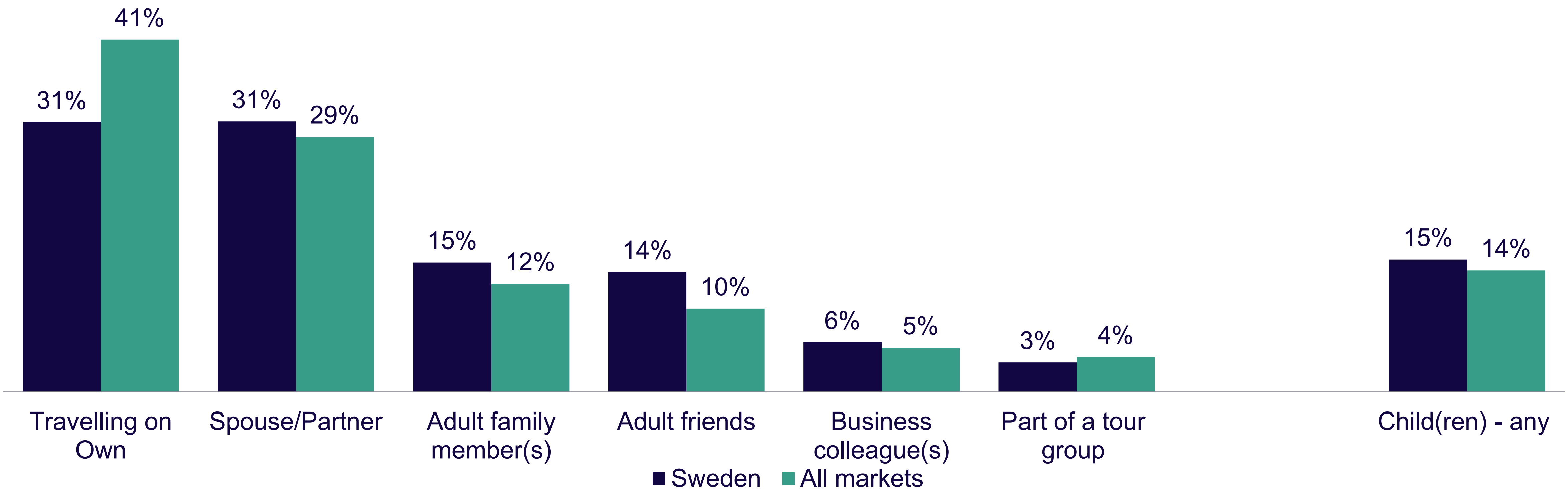
Gender ratio of visits from Sweden by journey purpose (2019):



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Swedish visitors to the UK travelled with?



- Close to one in three visits from Sweden are by travellers on their own, and the same proportion by those who visited with their spouse or partner respectively.
- The Swedish are broadly aligned with other markets on the proportion of other travel companions like tour groups, children and colleagues, but stand out with an above-average share of those who travel with other adult members or with family and friends.

Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

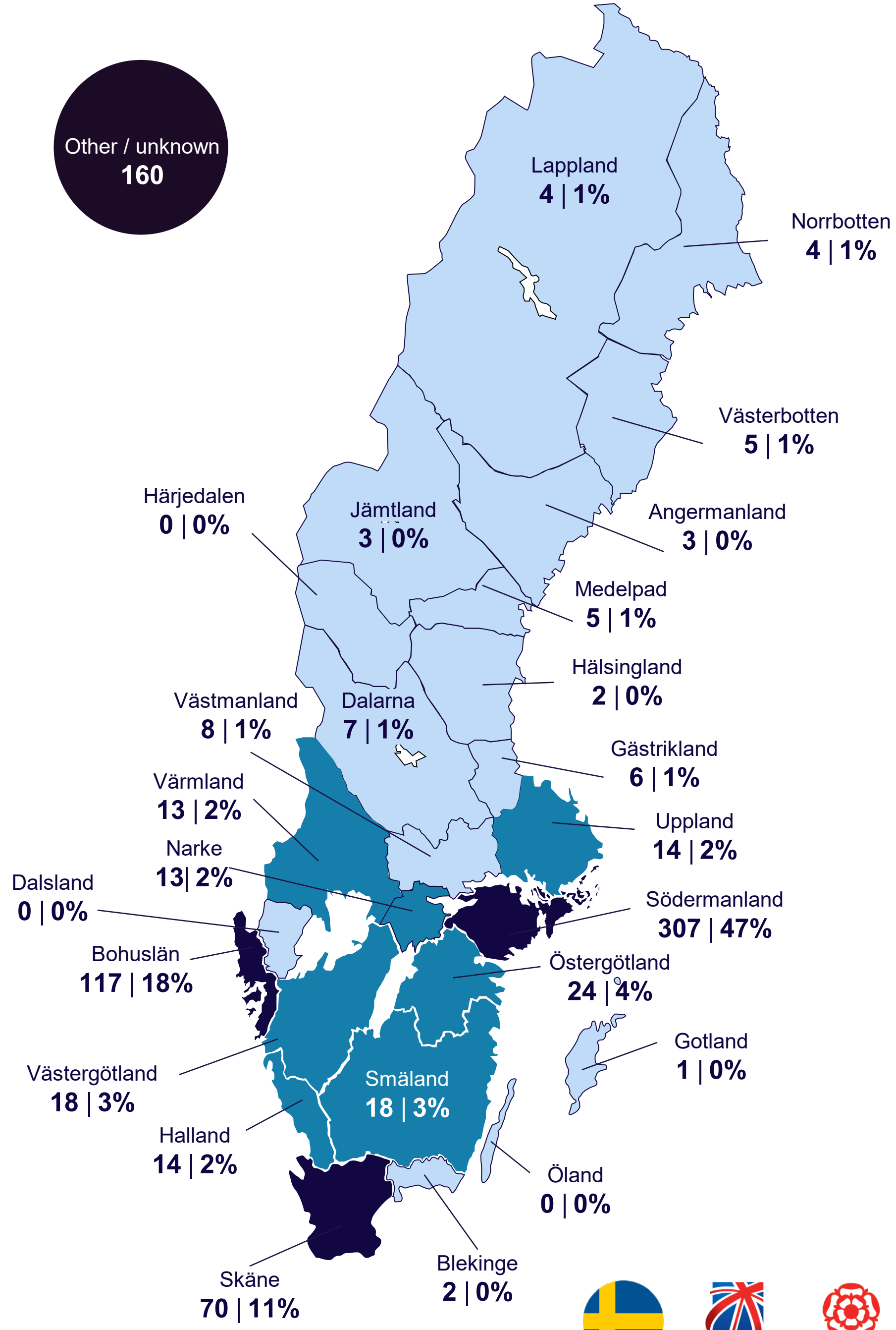
1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of Swedish visitors who came to the UK reside in Södermanland (incl. Stockholm), Bohuslän and Skåne (2016).
- The largest urban area in terms of inhabitants in 2021 are in the South (where the climate is milder and there is better connectivity to mainland Europe), and along the Baltic coast. Inland areas of the north tend to be sparsely populated which explains the small share of visitors sourced from these areas.

Visits in 000s | % share of visits

- High
- Medium
- Low
- None



Source: International Passenger Survey by ONS 2016, CIA World Factbook 2021

1.4 The UK and its competitors (1)

Market size, share and growth potential

- In 2019, the UK was the 5th most popular destination of Swedish outbound overnight travel globally behind Spain, Denmark, Norway and Germany, ahead of France and Finland. The UK's position in the destination ranking has been stable year-on-year.
- In a highly competitive set of destinations within Europe and beyond, the UK is projected to struggle keeping its market share, as are Norway, Italy and Poland. Denmark is forecast to expand its market share, along with smaller increases for France and the USA. Germany's and Ireland's market shares remain roughly stable.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the Swedish market are forecast to grow by 30% comparing 2019 and 2030, and Swedish visitor spending in the UK by 73% in the same timeframe, which would see the volume of Swedish visits exceed 1 million and the value of the Swedish market reach close to £700m by 2030.
- Before the pandemic, around 7-in-10 Swedish trips were taken within Sweden. Visit Sweden's domestic sentiment tracker found in July 2021 that more than two in five Swedes had taken a domestic break in the past 6 months.

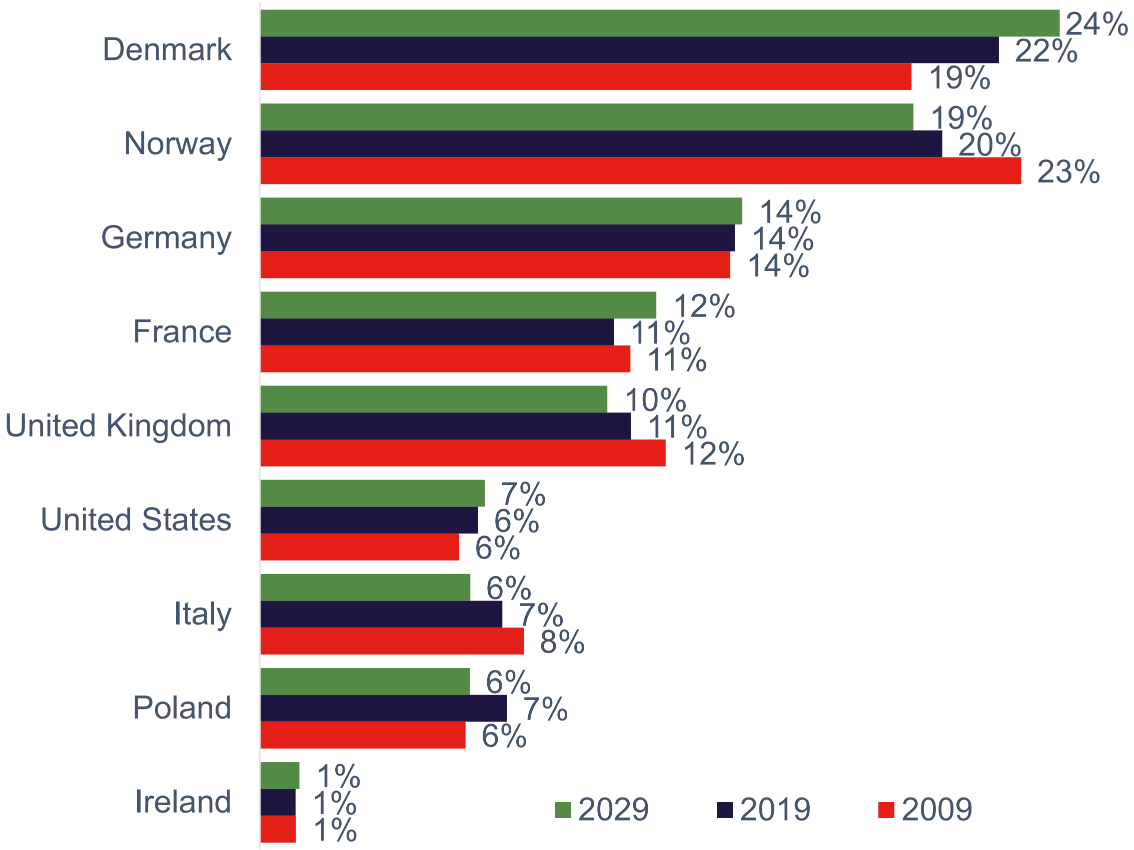
The UK ranks 5th

for Swedish outbound overnight visits

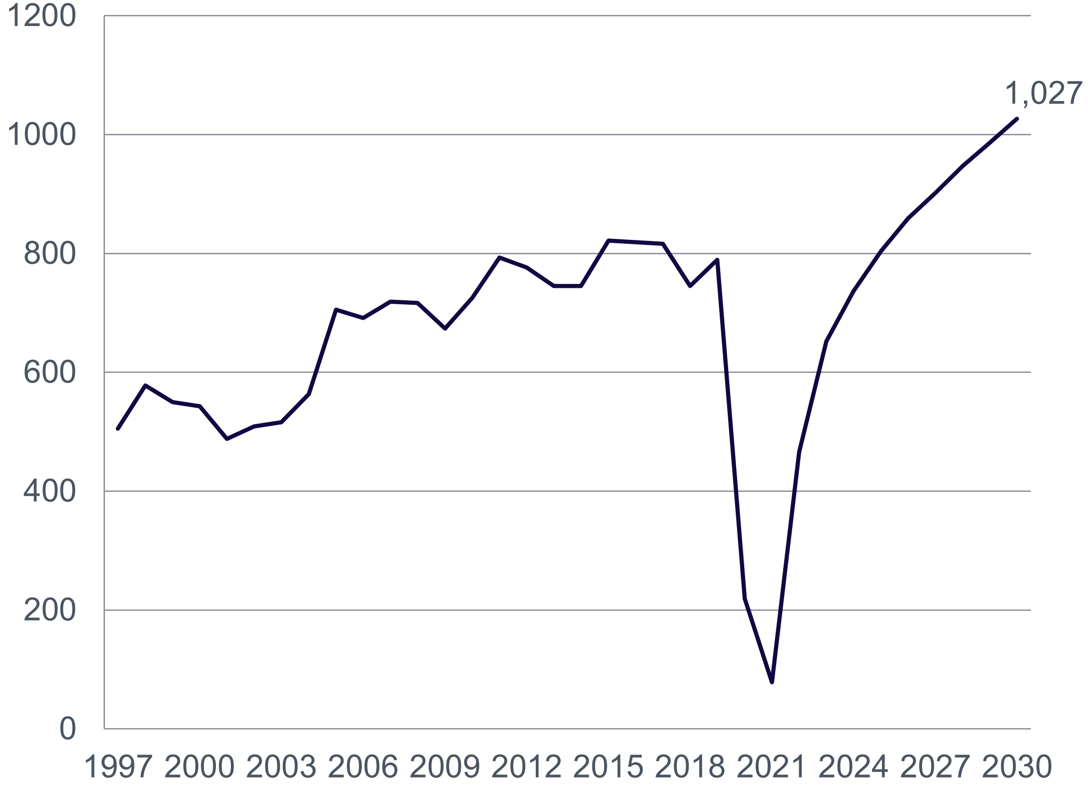
Source: Oxford Economics, Oxford Economics forecasts with VisitBritain adaptations
Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.
Statistics Sweden, Visit Sweden Swedish consumer travel sentiment research conducted in July 2021

1.4 The UK and its competitors (2)

The UK's market share of Swedish visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

Experiences and perceptions

Chapter 2

VisitBritain VisitEngland

2.1 Inbound activities: summary

- Almost two thirds of Swedish visits to the UK feature dining in restaurants; more than half enjoy going to a pub. Close to three in five Swedish visits involve shopping, especially when on holiday.
- 58% of Swedish holiday visits involve sightseeing and half allow time in parks and gardens and more than two in five visit castles or historic houses or museums or art galleries.
- Outdoors activities like walking in the countryside or going for a walk, hike or ramble are also popular among Swedes, particularly when visiting friends/family. A third of Swedes like to socialise with locals while here.
- Swedes have an above-average propensity to attend the performing arts and visit literary, music, TV, or film locations while on holiday in the UK.
- Almost 36,000 Swedish visits involved watching football live.
- 97% of Swedish visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

Top 10 activities for Swedish visitors during their visit to the UK

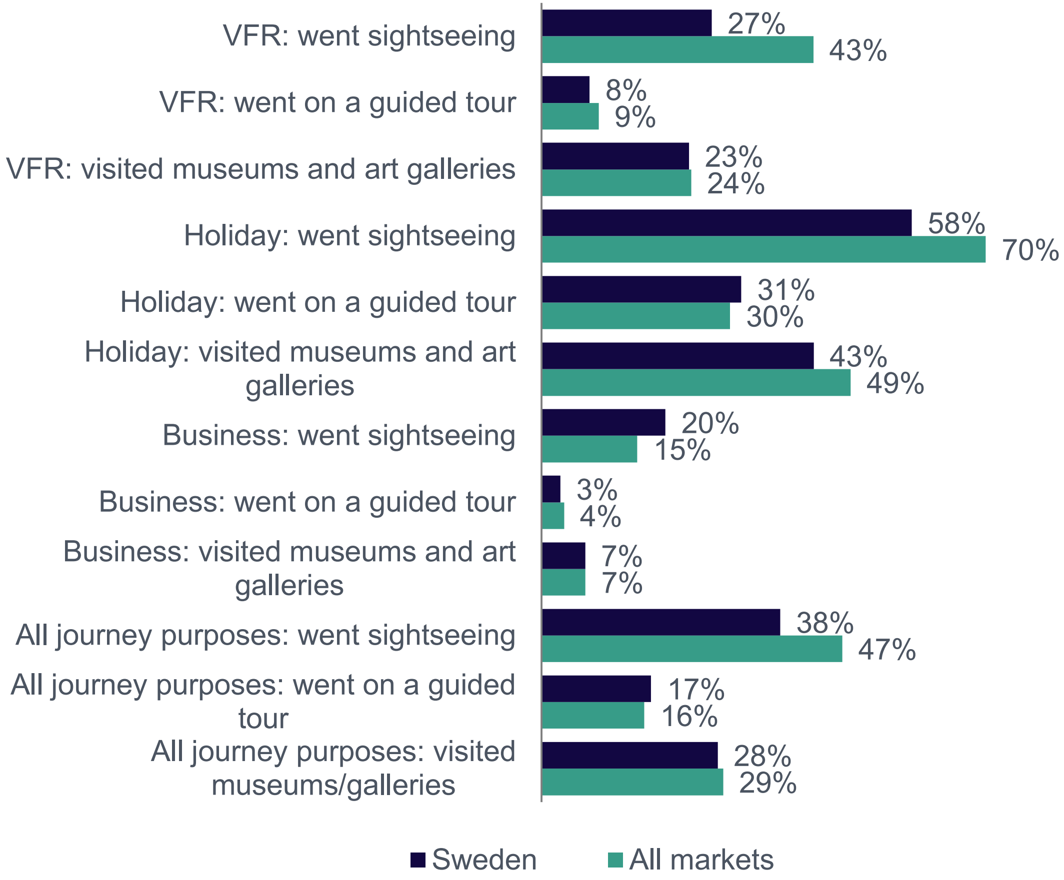
1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Sightseeing famous monuments/ buildings
5. Visiting parks or gardens
6. Socialising with the locals
7. Visiting museums or art galleries
8. Visiting castles or historic houses
9. Walking in the countryside
10. Going for a walk, hike or ramble

For more information on activities, please visit our webpage of activities undertaken in Britain

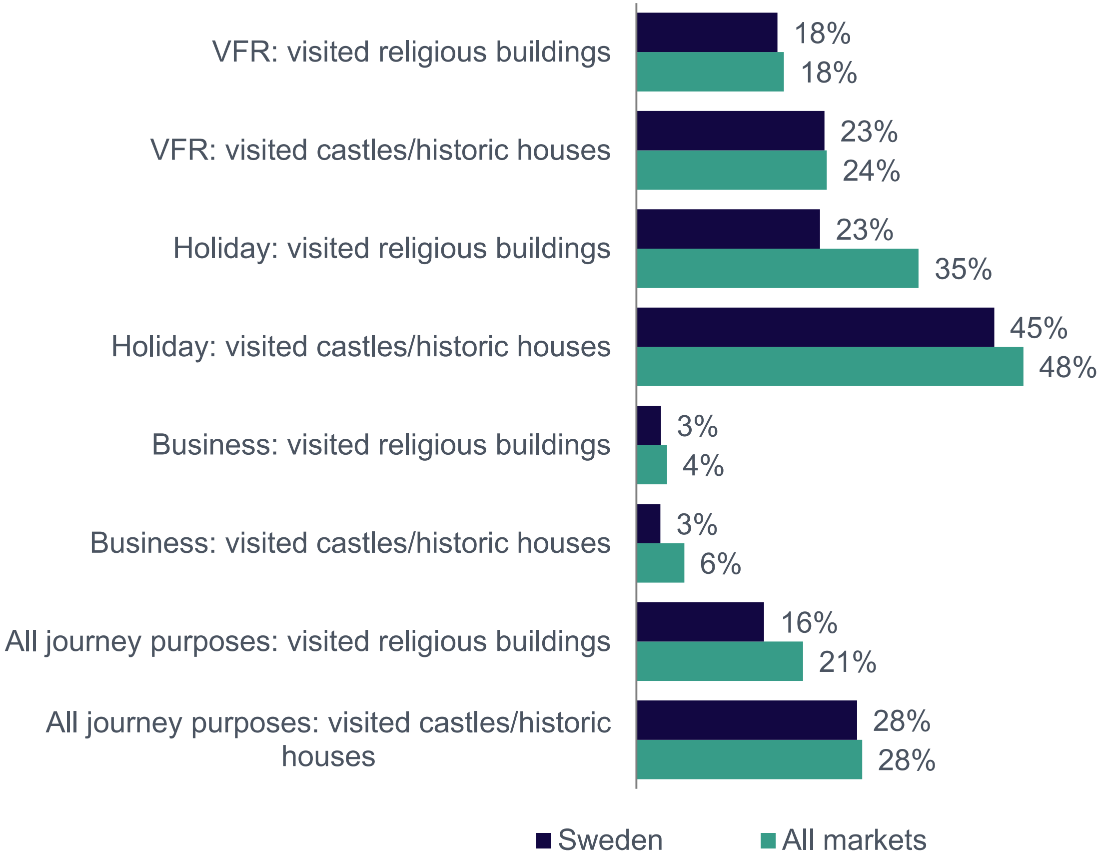
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour



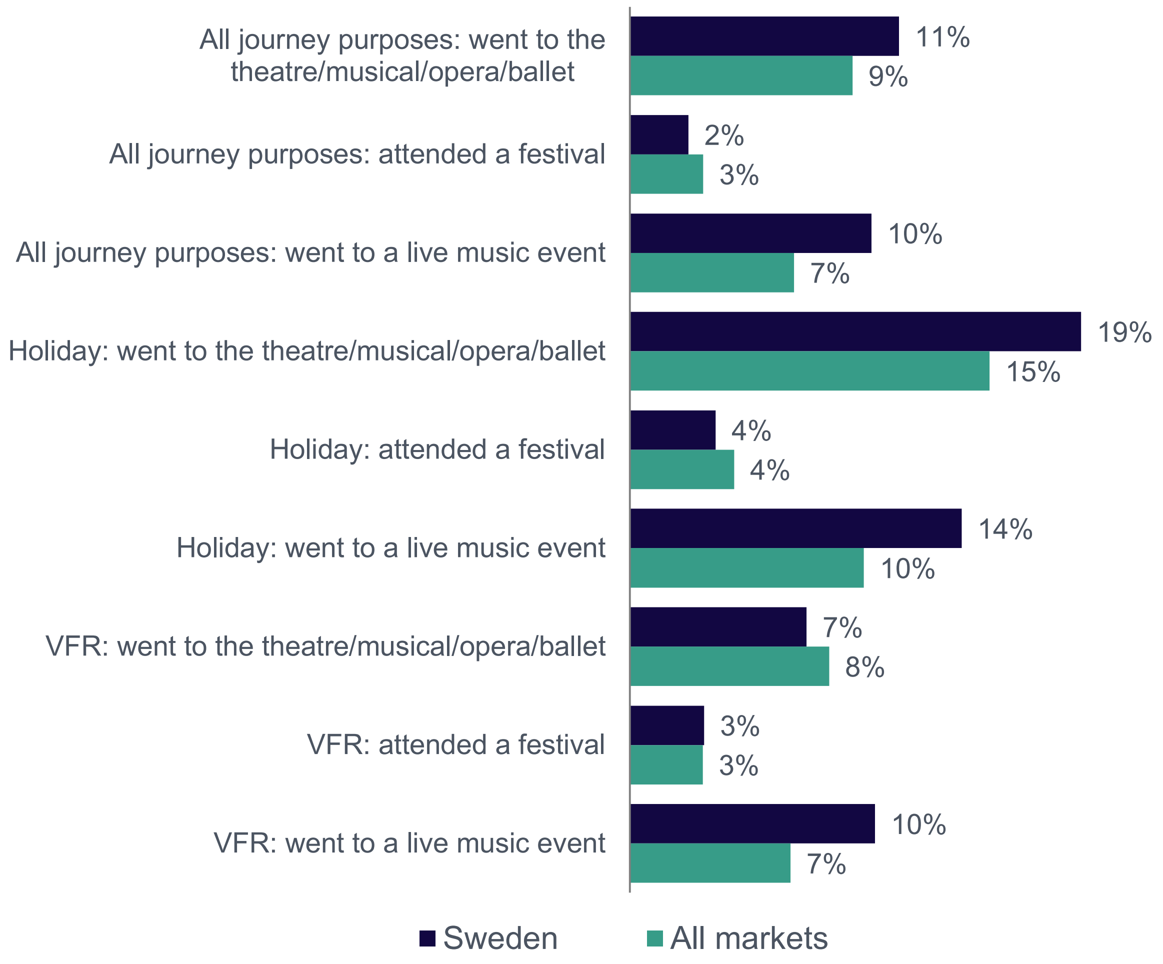
Propensity to visit built heritage sites



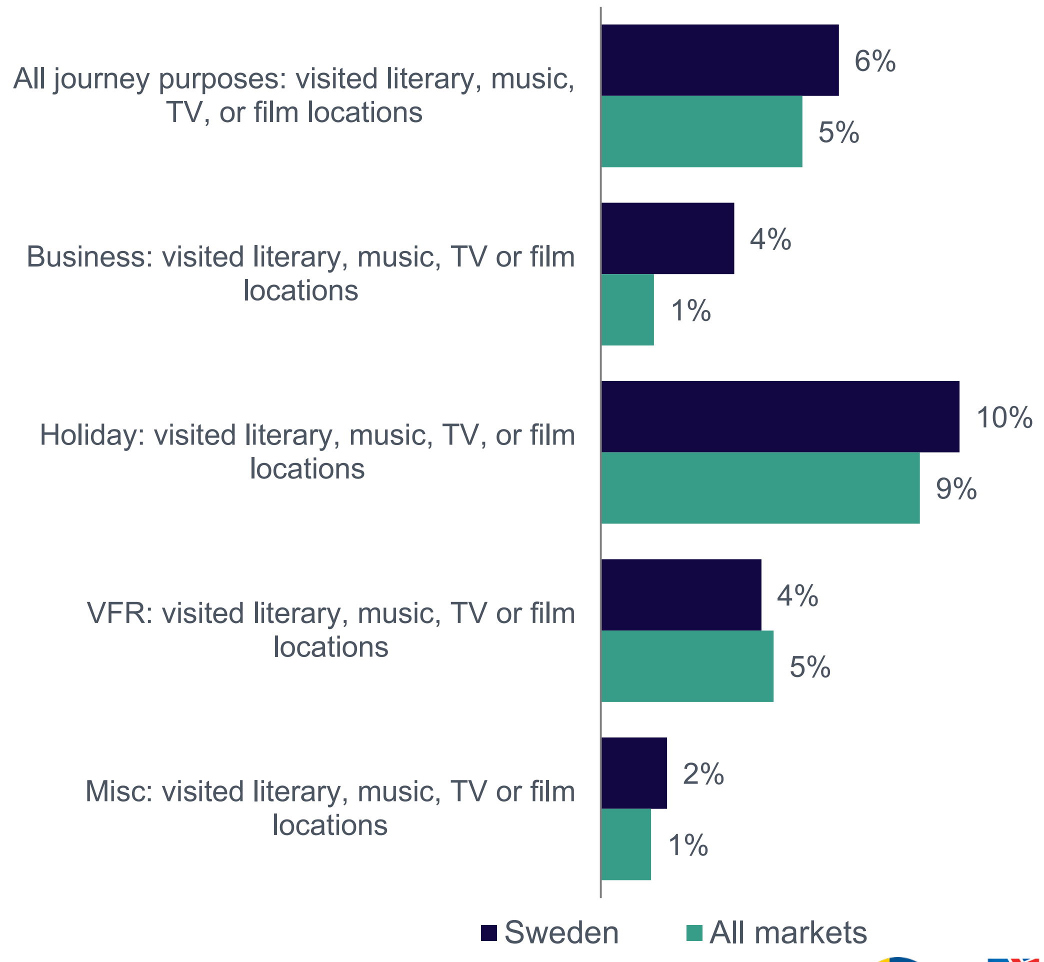
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



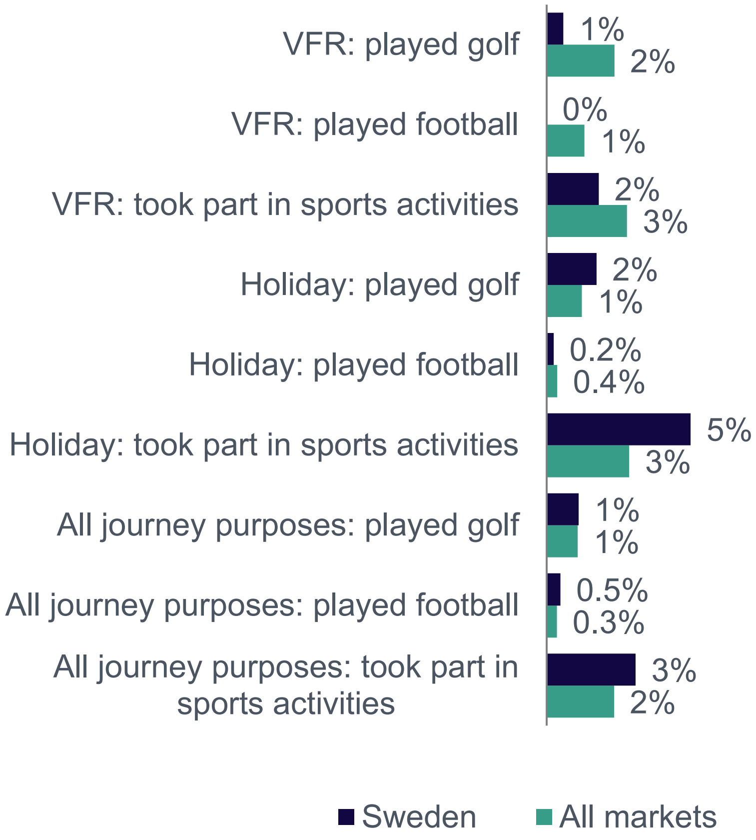
Propensity to visit literary, music, TV, or film locations



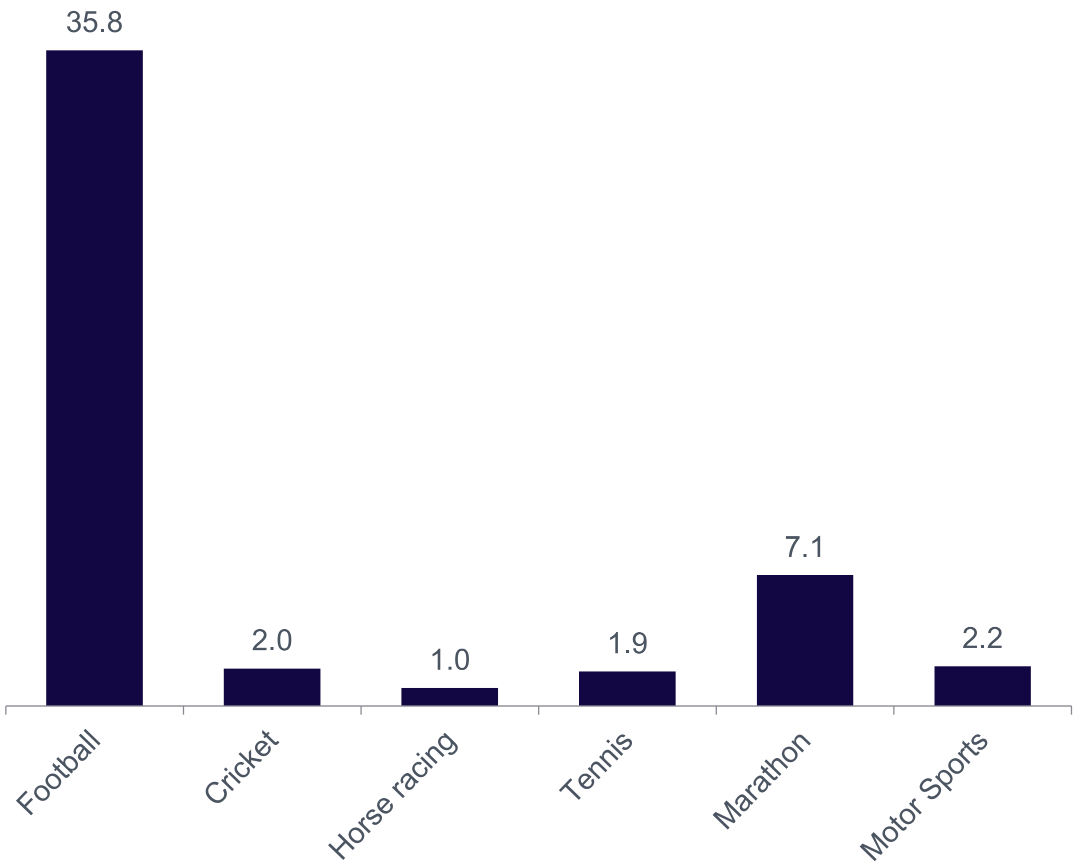
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



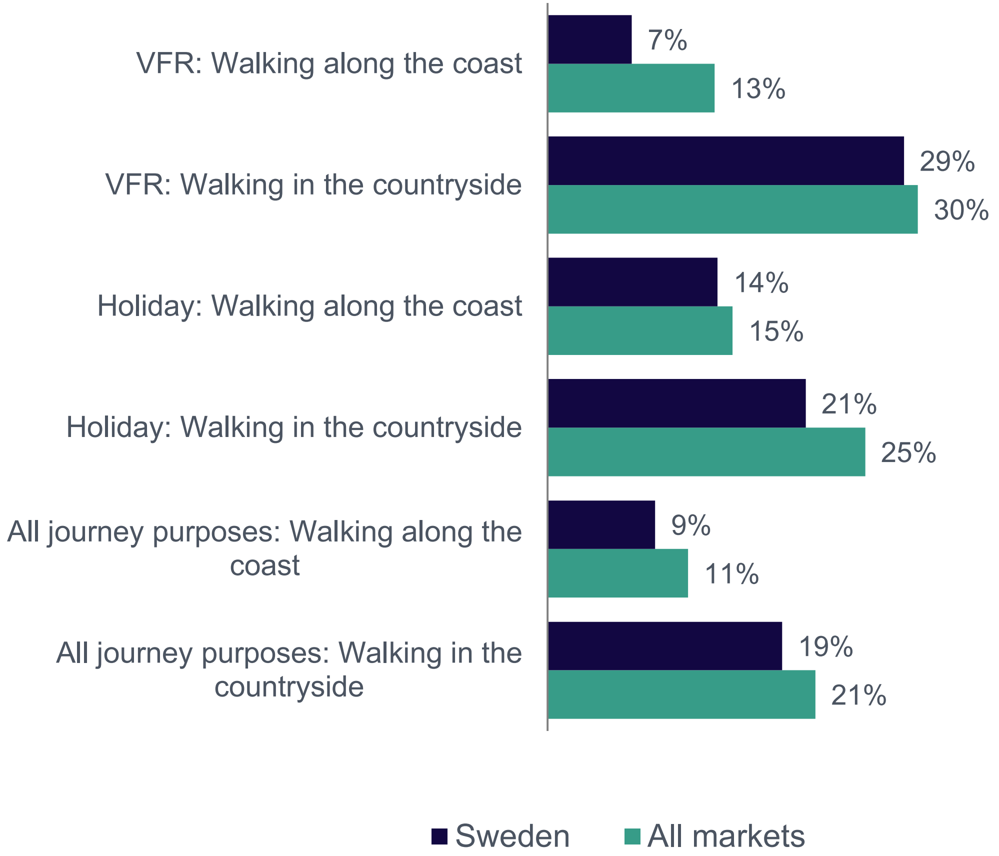
Number who watched sports live during trip (000s)



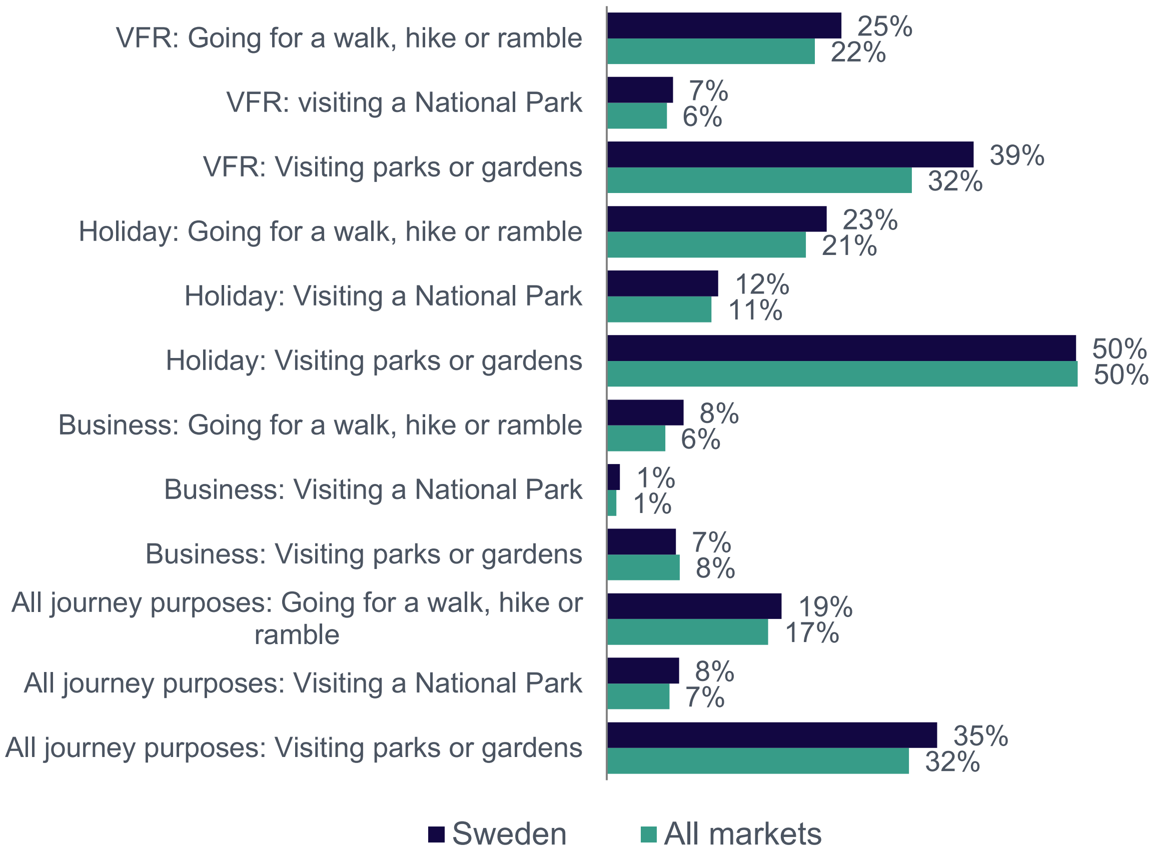
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



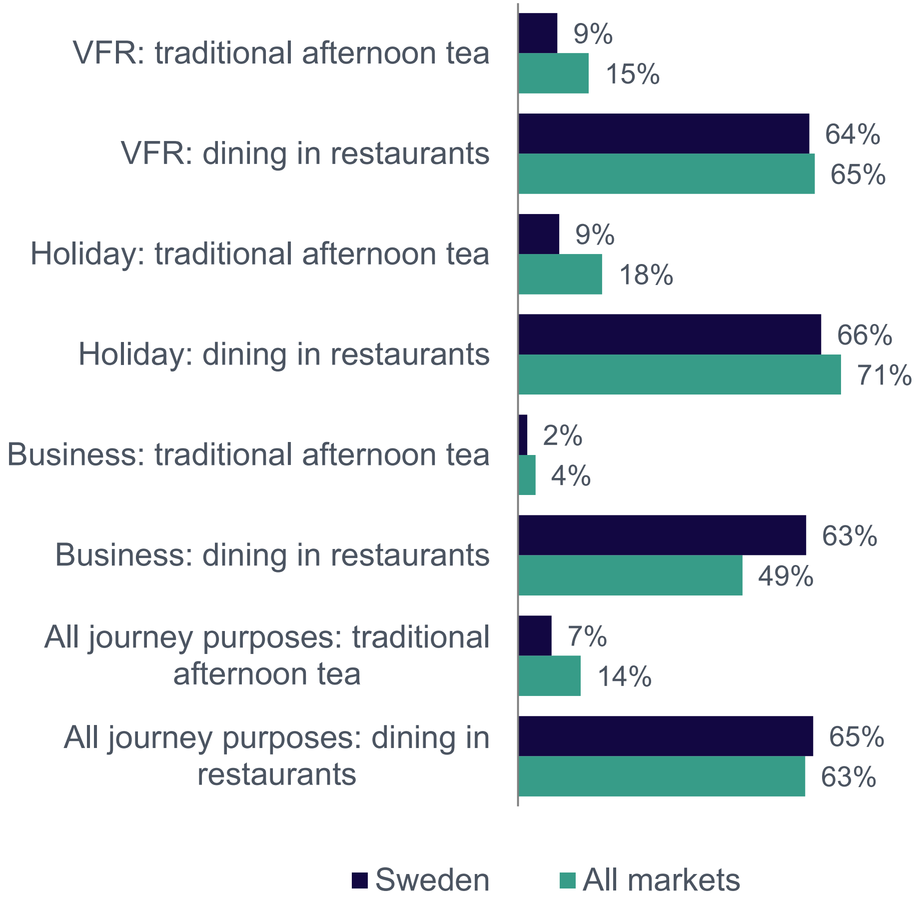
Propensity to enjoy the outdoors



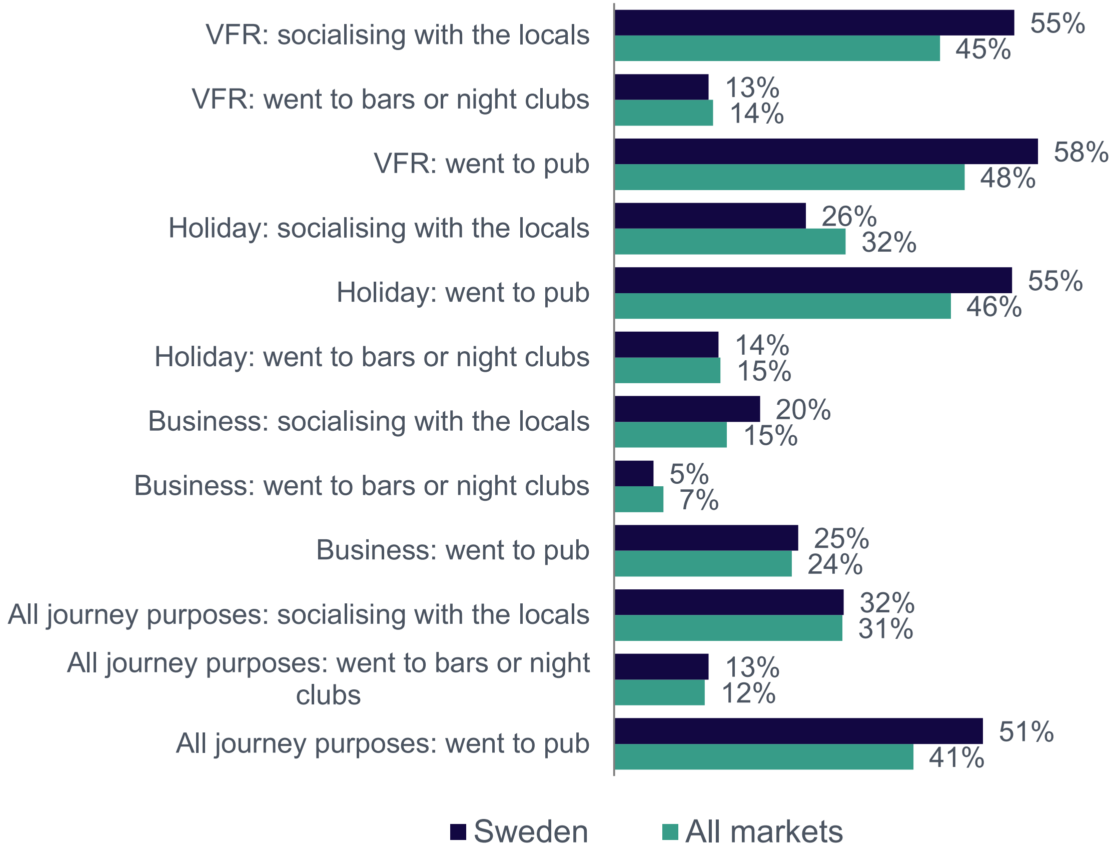
Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



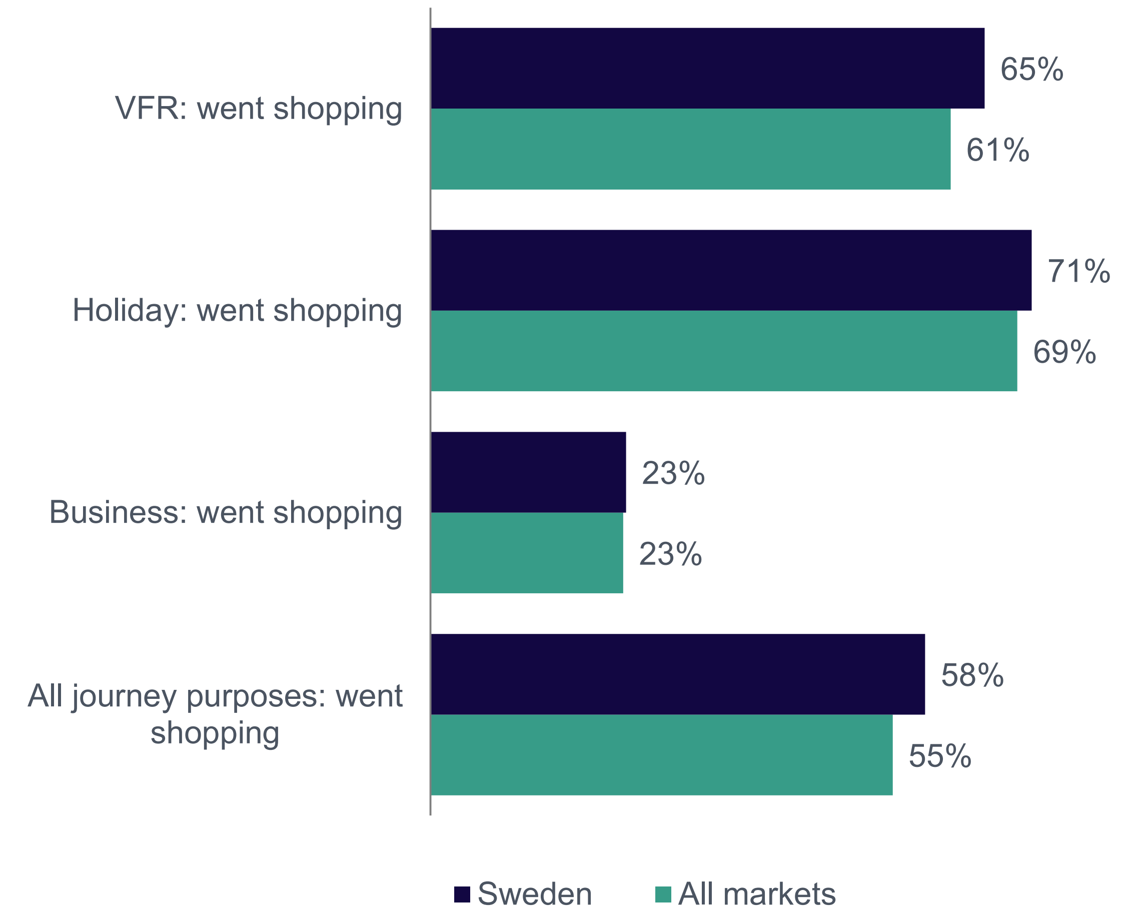
Propensity to go to the pub or bars and night clubs, or to socialise with locals



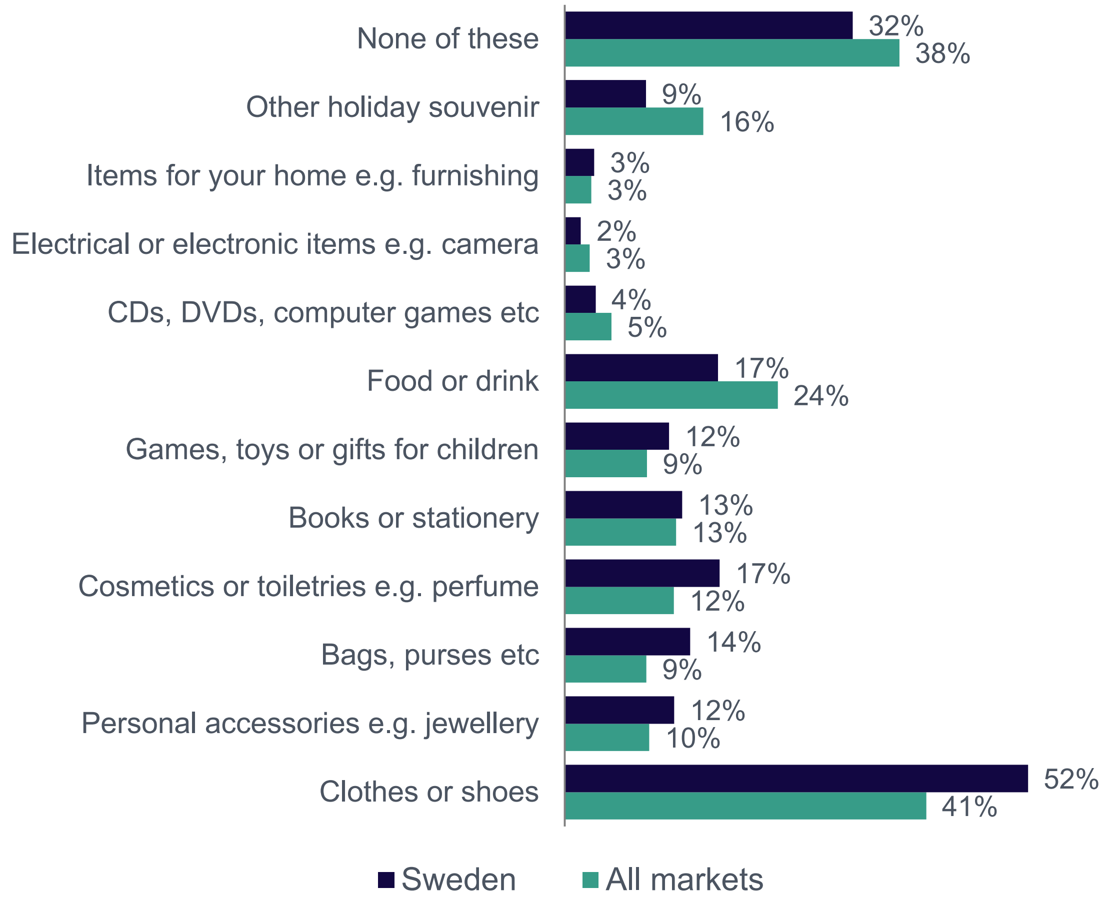
Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



Propensity to purchase selected items



Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

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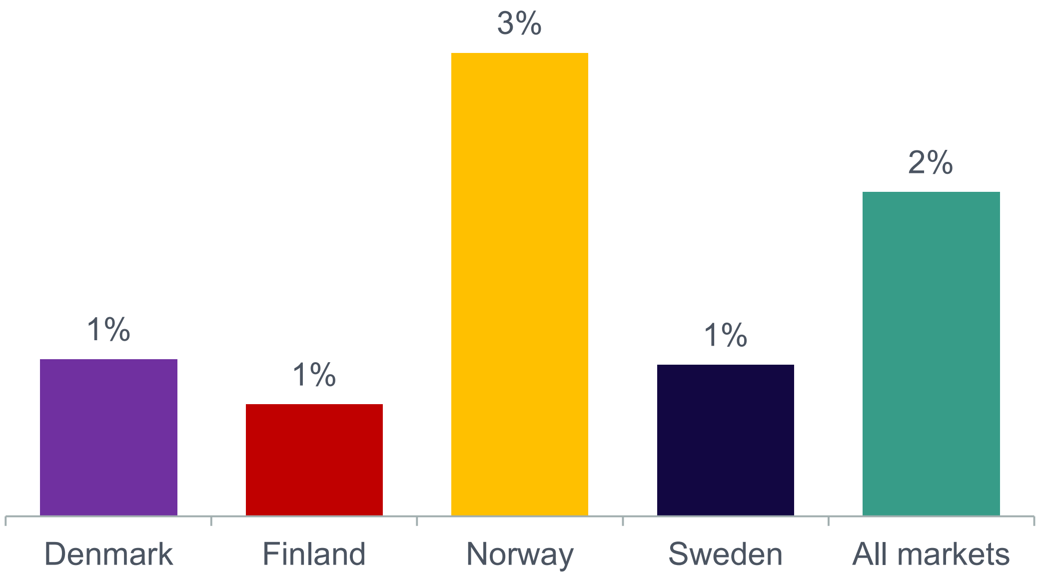
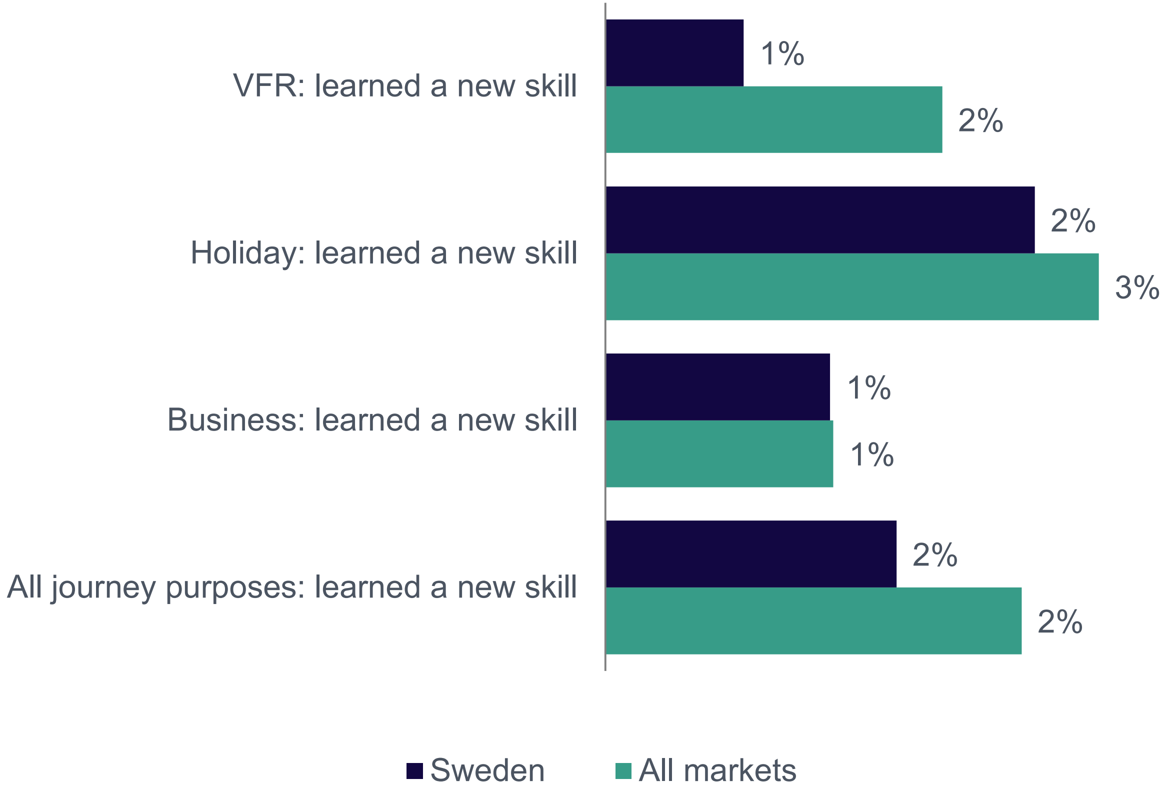
2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Experiencing a visit to the UK

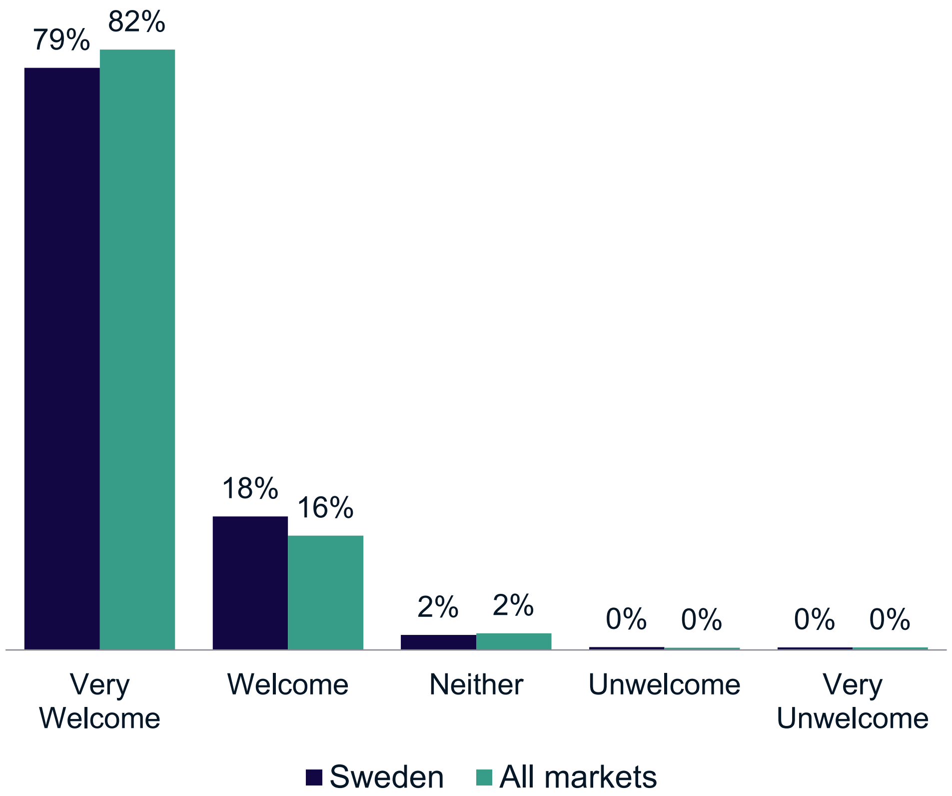
- Almost eight in ten visitors from Sweden felt very welcome during their stay in the UK. More than four in five of Swedish visitors were very likely to recommend a stay in the UK for a holiday or a short break at the end of their visit, roughly in line with the all-market average.
- Asked for reasons which would encourage the Swedes to travel back to the UK for a holiday, more than two in five stated they would be back to visit sights/attractions or a destination they didn't go to on a previous visit and to experience a new activity they have not engaged on a prior visit.
- Swedes also over-index for stating the ease of getting to the UK, positive interactions with locals on a previous visit, learning new skills and crafts and going back to the same part of the UK they went to before as reasons to return to the UK.
- While returning for the local food/drink is a key reason for Swedes to go back to the same destination generally, it was stated by a quarter of Swedes when it comes to travelling to the UK again (vs. 42% to any destination).

97%
of Swedish visitors would recommend a holiday or short break in the UK*

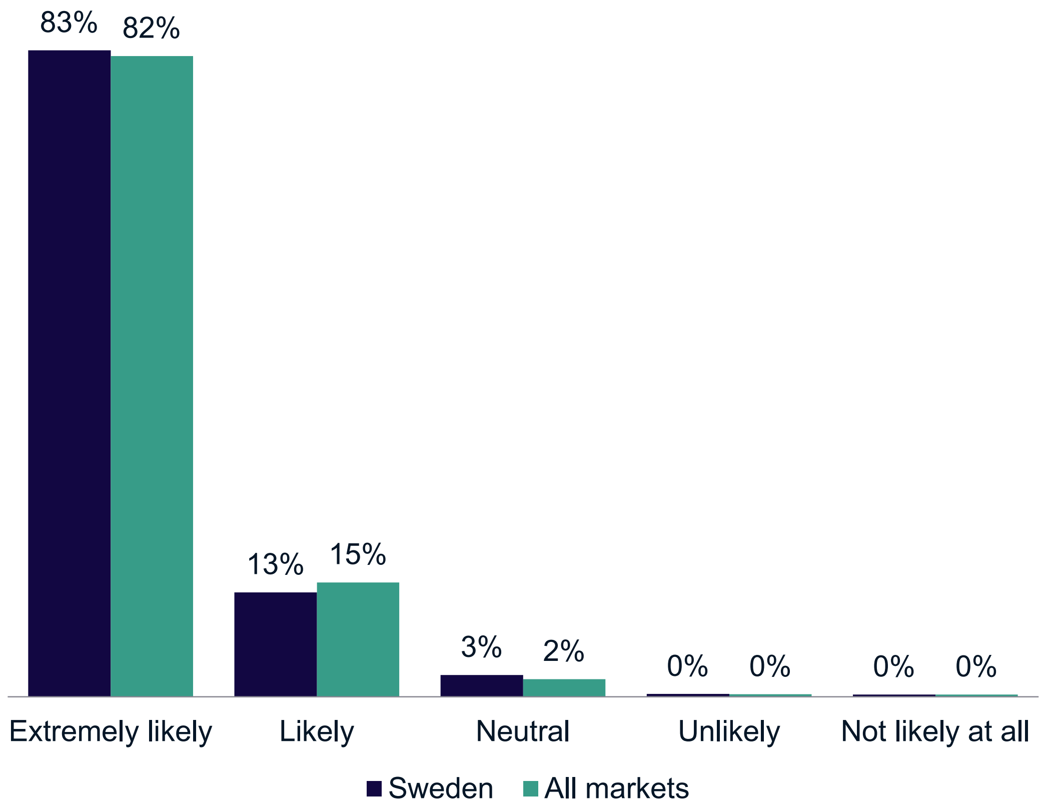
Source: IPS by the ONS (2017; *all visits, excluding UK nationals), Ipsos-Anholt Nation Brands Index 2019 (previous visits refer to previous holiday visit(s) made to the UK)

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain



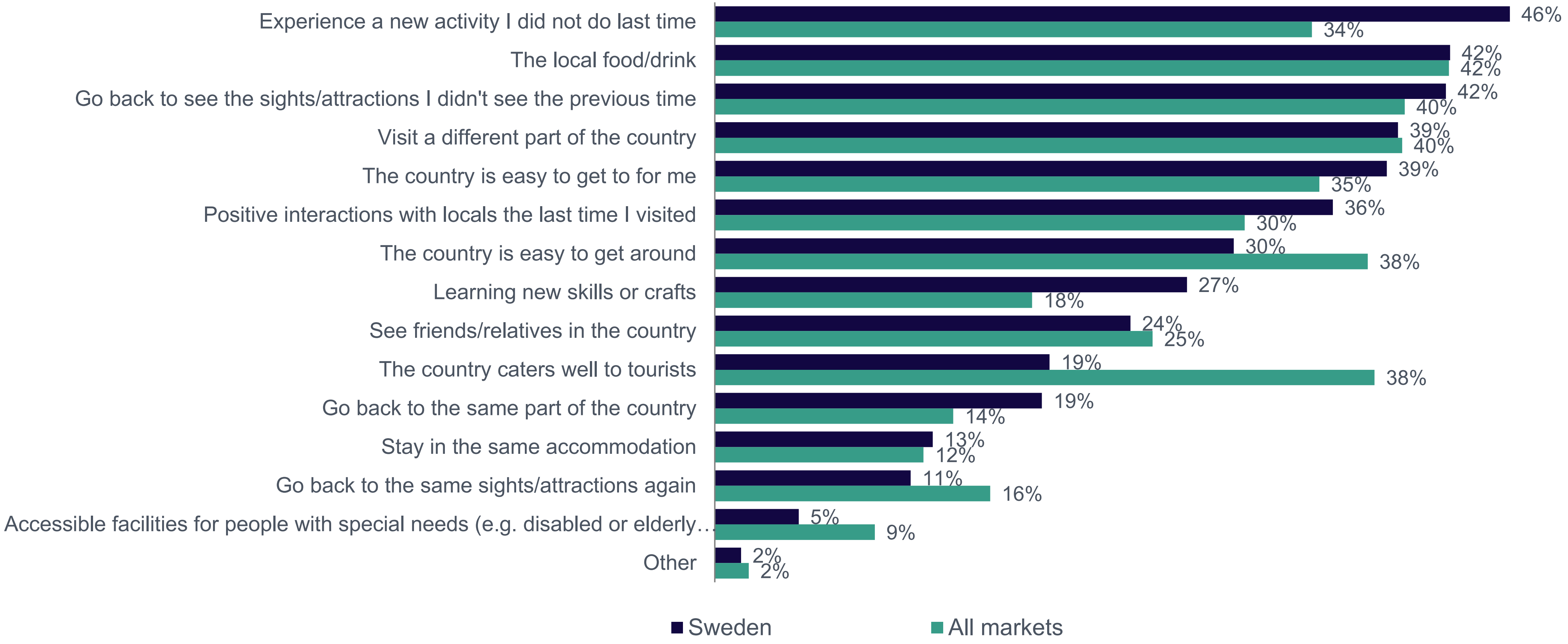
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excl. UK nationals and nil nights)

2.2 Reasons to return to a holiday destination

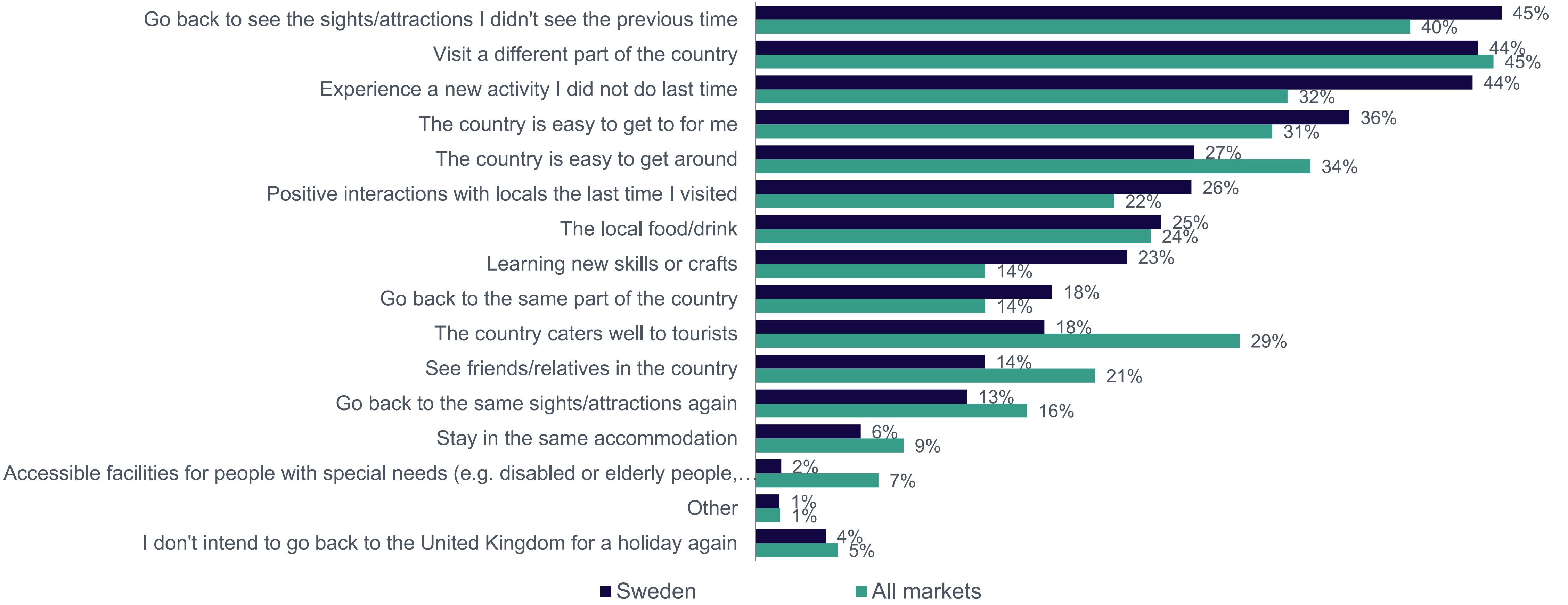
Reasons to return to a destination in general



Source: Anholt-Ipsos Nation Brands Index 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt-Ipsos Nation Brands Index 2019

2.3 Perceptions of the UK (1)

- The Swedish rate the UK highly for vibrant cities, contemporary culture and culture overall, sports and built heritage, but less so for its natural beauty; the UK is rated 23rd out of fifty nations on this attribute.
- Music is the cultural product or service the Swedes most strongly associated with the UK, followed by films, and museums.
- A trip to the UK would be expected to be 'Educational' and 'Exciting' to equal measure (37% respectively) by the Swedes.
- 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.
- Cultural attractions and vibrant cities are the biggest draws for choosing Britain for a holiday.
- Activities that appeal to potential visitors from Sweden include visiting Madame Tussauds, having traditional afternoon tea, driving through the English countryside, taking a canal boat tour in England, going on a food tour of one of London's best foodie markets, riding the 'Hogwarts Express' (Harry Potter train), watching a musical in London's West End and sharing stories with locals at a cosy rural pub.

Swedes rate the UK **first out of 50** countries for vibrant city life and urban attractions.

Source: Ipsos-Anholt Nation Brands Index 2020 and 2018, VisitBritain/Ipsos 2016, VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (2)

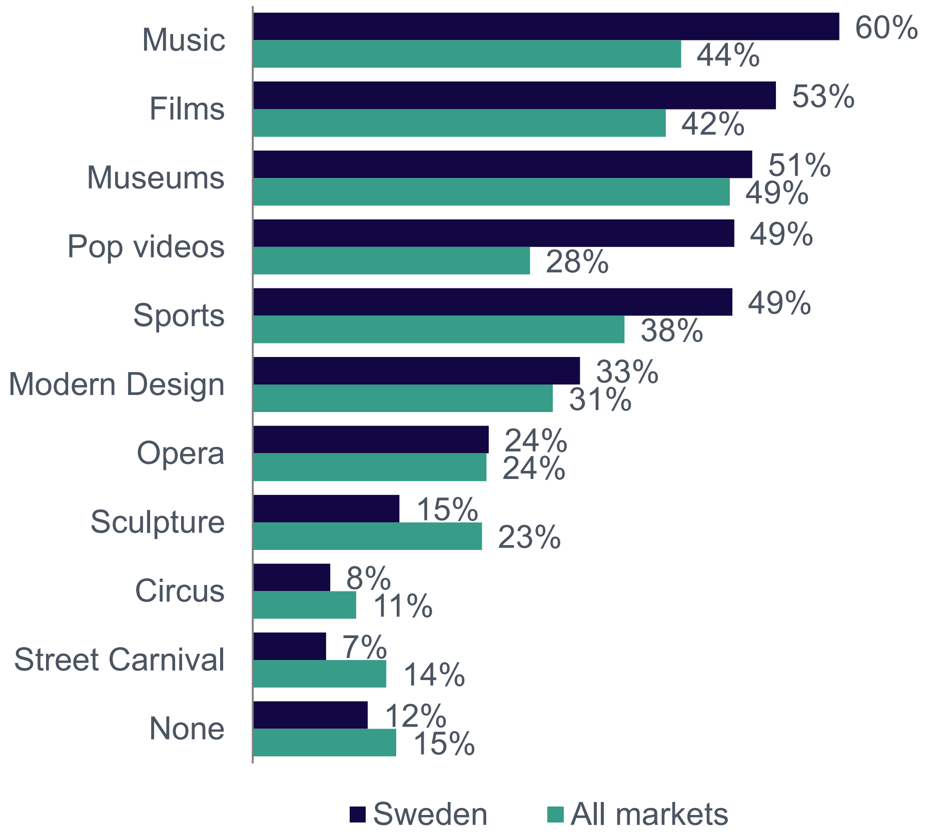
UK's ranking (out of 50 nations)

Measure	Swedish respondents	All respondents
Overall Nation Brand	**4**	**2**
Culture (overall)	**4**	**3**
The country has a rich cultural heritage	9	6
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	5	3
People (overall)	**6**	**4**
If I visited the country, the people would make me feel welcome	8	11
Tourism (overall)	**4**	**4**
Would like to visit the country if money was no object	3	5
The country is rich in natural beauty	23	23
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	1	4

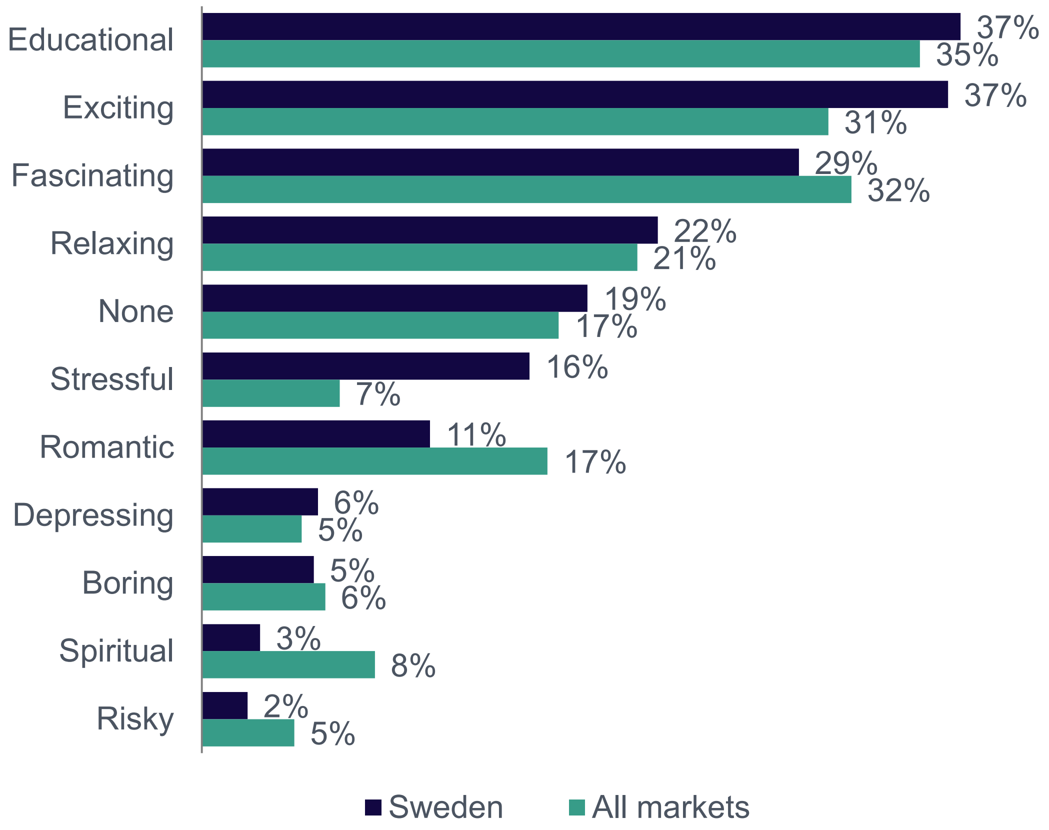
Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	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%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

Holiday wants and % saying destination is best place for… bottom 20

Importance	Perception	GB	FR	IT	AU	US	GE
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

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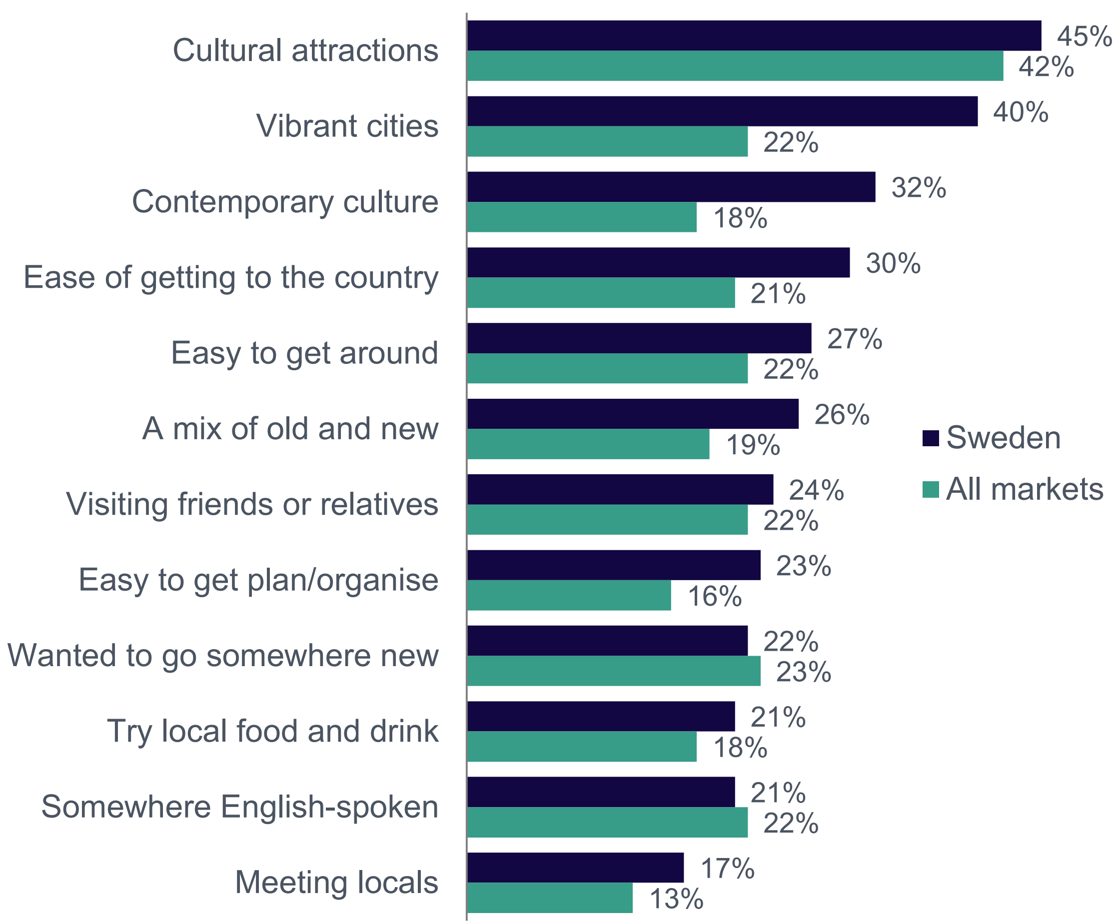
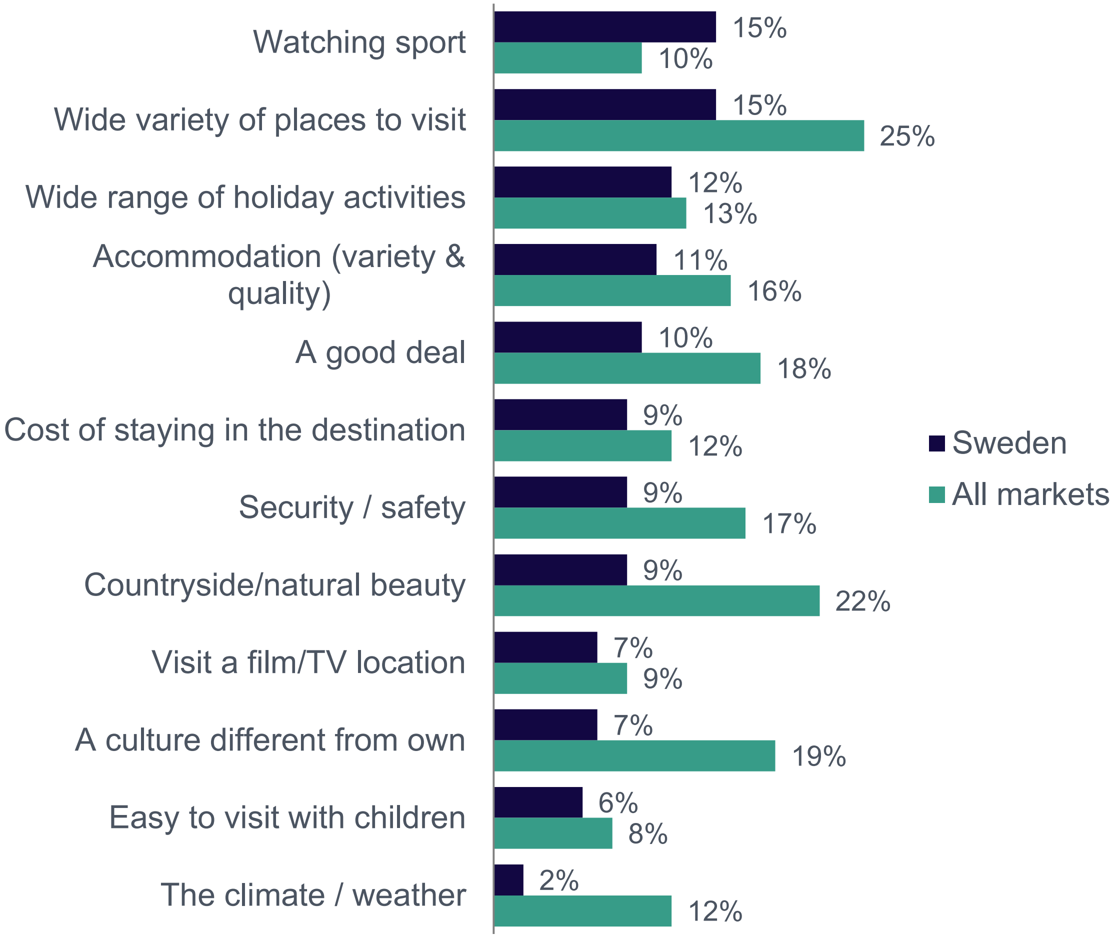
2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination





Source: VisitBritain/IPSOS 2016, adjusted data, 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)

Understanding the market

Chapter 3

3.1 Structural drivers

- Population of more than 10 million.
- 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 minority 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. More senior job positions tend to have 30 days of annual leave.

10.3

Swedish population
(2021)

Source: Oxford Economics, CIA World Factbook 2021

3.1 Structural drivers: general market overview

General Market Conditions

- Sweden is the UK's 15th largest source market in terms of inbound visits, and 21st most valuable in terms of visitor spending in 2019.
- The Swedish economy is generally speaking quite strong. It emerged from the financial crisis in 2008/09 better than many other countries and growth has since outpaced many other major European economies. Despite an inevitable impact from the COVID-19 pandemic, the Swedish economy fared comparatively better than many other countries.
- As of 17 September 2021, Oxford Economics saw slight growth for the second quarter of 2021 which bodes well for a strong performance in Q3. The employment market continues to recover at a steady pace, although it is expected to take until mid-2022 for unemployment levels to fall to pre-pandemic levels.
- A major fiscal response with stimulus payment facilitates the crisis recovery in 2021 and 2022, but the government is expected to scale back support measures in 2022.

Key demographic and economic data

Measure (2021 data)	Sweden	Eurozone
Population (m)	10.4	339.8
GDP per capita PPP (US$)	50,876	43,875
Annual average GDP growth over past decade (%)	1.8	0.8
GDP growth year-on-year (%)	4.2	5.1

Economic indicators

Indicator	2019	2020	2021	2022
Real GDP growth	2.0%	-2.9%	4.2%	3.0%
Real consumer spending growth	0.8%	-4.7%	4.3%	4.0%
Unemployment rate	6.8%	8.3%	8.7%	7.0%

Source: Oxford Economics

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3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2021)	10.4m
Median age (2020)	41 years old
Overall growth rate (2020-2025)	3.9%

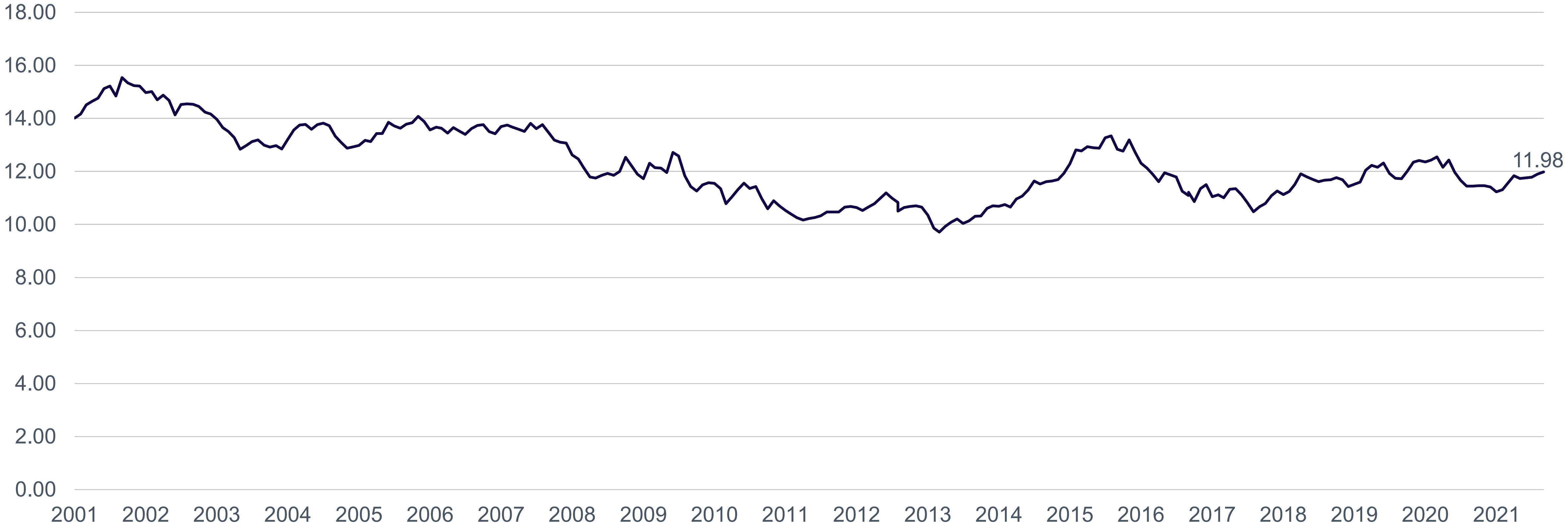
Indicator	1980	2015	2030	2050
Median age (in years)	36.3	40.9	42.2	43.8

- 88% of Swedes live in urban areas (World Bank estimate).
- Sweden has a population of more than 10 million with a median age of 41. The Swedish population is ageing, like in many other European societies. In terms of median age, Sweden ranks globally in 47th place.
- Most Swedish people are well educated and enjoy a good standard of living with real GDP per capita in purchasing power parity terms well above the Eurozone average.
- Swedish is the official language; many Swedes have very good command of English.
- According to the Capgemini World Wealth Report 2021 there were 153,000 High Net Worth Individuals (HNWI)* resident in Sweden in 2020, representing an increase of 11% on 2019. It is globally the 24th largest HNWI population and saw above-average year-on-year growth.

Source: Oxford Economics, CIA World Factbook 2021, World Bank 2020, Statista 2021, Capgemini World Wealth Report 2021 *definition in appendix

3.1 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 on our website.

Source: Bank of England

3.2 Consumer trends

- 2020 saw an estimated 77% year-on-year decline in volume and 75% decline in value of visitation from Sweden to the UK as a result of the COVID-19 pandemic. Overall, Swedish trip-taking was severely affected after a normal start of 2020 in January and February.
- Staycations enjoyed new popularity in the Swedish market. According to ERV's Travel Barometer 2021, Swedes took an average of 10 domestic trips despite the pandemic throughout 2020.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 81% of the Swedes considered taking an international leisure trip in the next 12 months (fieldwork 23rd August – 6th September 2021), showing the strongest desire to travel abroad since the start of the tracker. Of them, 74% are considering Europe and 13% Britain.
- The top three activators which make it more likely that Swedes would take a leisure trip abroad are money back guarantees in case one needs to cancel the trip, hygiene and safety protocols in the destination as well as the removal of quarantine policies at the destination. Swedes continue to look to avoid crowds as a key worry is that other people around them may not follow COVID-19 regulations. More than half of Swedes intend to think more about sustainability and the environmental impact when planning a future holiday.

52%
of Swedes say they that they will think more about sustainability and the environmental impact when planning a future holiday.

Sources: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, ERV Resebarometern 2021, Travel News 2 August 2021; VisitBritain Sweden

3.2 Consumer trends: overall travel trends

Travel trends

- Swedes still travelled normally in January and February 2020 but as the COVID-19 pandemic hit, foreign travel – for work or leisure – declined dramatically and staycations boomed in Sweden during 2020.
- According to ERV's Travel Barometer 2021, Swedes took an average of 10 domestic trips despite the pandemic throughout 2020. Among foreign countries, Swedes travelled to in 2020, Spain and neighbouring Nordic countries performed best. Swedes took 29 million holiday trips in 2020 with at least one night and 50 million day trips. This can also be described as an average of 3.5 overnight trips within Sweden per adult and 6 day trips.
- Data from regional tourism organisations suggests that particularly Swedish nature destinations saw a sharp increase in visitation compared to previous summers, while particularly cities saw a steep decline in visitation, partly attributed to high incidence levels. Visiting friends and family was a key reason for trips, as well as treating oneself to time on beaches, in forests, on the islands, in nature reserves and national parks. For this reason such areas in vicinity to the metropolitan areas proved particularly popular as many opted to stay close to home but still wanted time away.
- Most Swedes took those trips via car but 13% opted for a train on their domestic holiday in 2020.
- In these uncertain times, many Swedes try and mitigate the risk when travelling. The above-mentioned travel barometer shows that seven out of 10 Swedes surveyed feel that protection against the pandemic risk should be either already included in travel insurance or there should be an offer of pandemic protection separately. Every second Swedish foreign traveller states that travel insurance has become more important to them and there is a need for protection which has increased as a result of the pandemic.
- The lack of opportunity to travel abroad during the pandemic seems to have increased the appetite of Swedes for foreign travel after the pandemic – 86% of Swedes say they expect to travel with a similar frequency while 10% even say that they intend to travel abroad more than prior to it.
- Business trips have also been severely hit by the pandemic. The Association of Swedish Travel Agents and Tour Operators warns that business travel could fall by as much as 50% in the next two years with shorter business trips hit hardest. This includes both domestic and potentially short-haul in particular as video conferencing is often seen as a viable alternative.

Sources: ERV Resebarometern 2021; Travel News 2 August 2021; VisitBritain Sweden

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on Swedish travel behaviour

- 2020 saw an estimated 77% year-on-year decline in volume and 75% decline in value of visitation from Sweden to the UK as a result of the COVID-19 pandemic.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 81% of the Swedes considered taking an international leisure trip in the next 12 months (fieldwork 23rd August – 6th September 2021), showing a strong desire to travel. Of them, 74% are considering Europe and 13% Britain.
- Britain ranks 3rd for consideration of Swedes hoping to go on a European leisure trip, behind Spain, and Greece, ahead of Italy, Denmark, Germany, France, Croatia, Norway and Portugal.
- As of summer 2021, most are happy to take pre-trip testing if required (64%), but we are still likely to see Swedes looking to avoid crowds even if attractions may be missed as a result. Key concerns which are on Swedes' mind are that people around may not be following COVID-19 policies/procedures (71%), a worry around extra admin involved with new policy/rules during the trip (64%), a concern about access to healthcare if they contract COVID-19 while abroad (59%), a fear of contracting COVID-19 during their journey/trip (57%) and the worry about potential changes in quarantine requirements on their return home (53%).

Key activators for an international leisure trip	Sweden	All markets
Money back guarantee should one with to cancel their trip	40%	35%
Hygiene & safety protocols in place at destination	37%	26%
Removal of quarantine policies in destination country	32%	28%
Decrease in coronavirus cases at destination	31%	31%
An attractive offer e.g. discounts on flights or accommodation	30%	25%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

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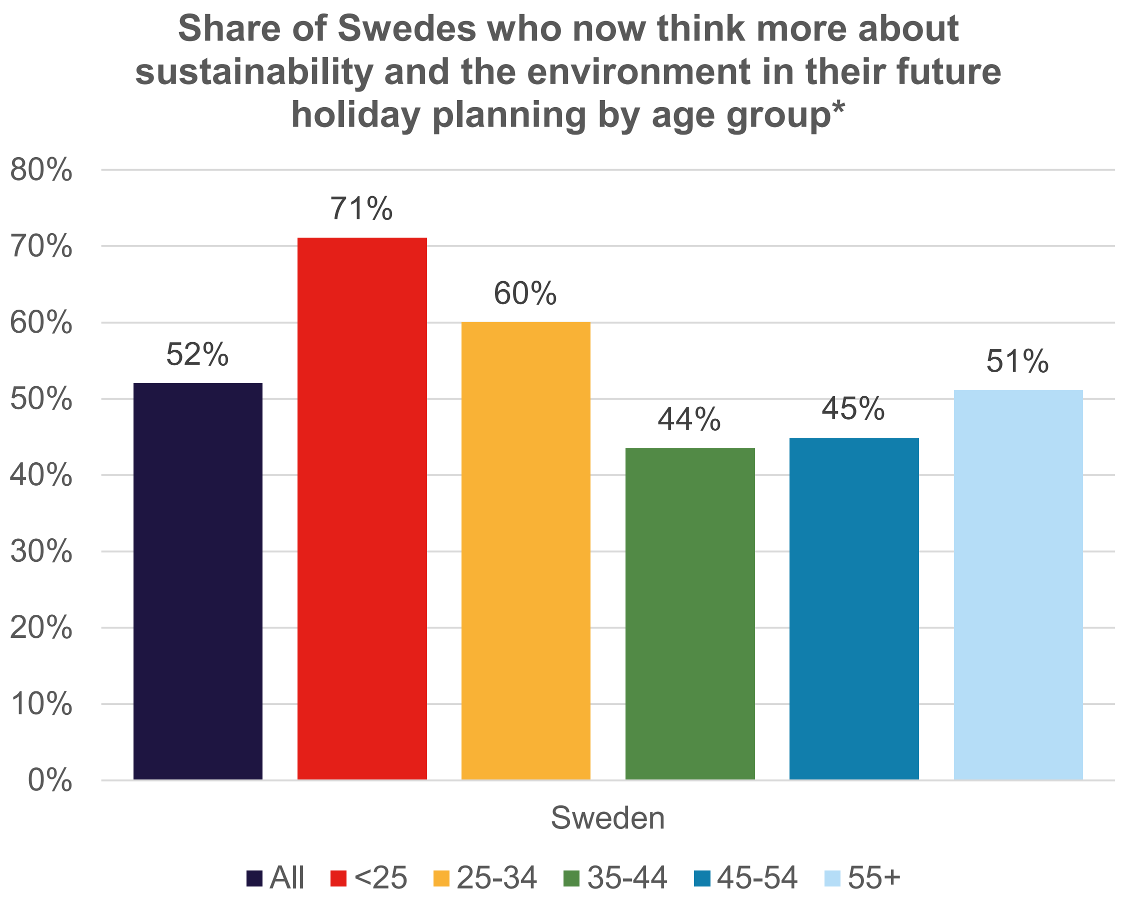
3.2 Consumer trends: sustainability

Travel trends – sustainability is an increasingly key consideration for holiday planning and behaviour

- Over half of Swedes (52%) state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups show the strongest intention to change their behaviour.
- Tracking the environmental impact of their action is something that many Swedes are interested in – after all the country is home to Greta Thunberg and her environmental movement and the social movement which is against flying (Flygskam – Swedish for flight shame). In spring 2021, more than three in five Swedes stated that they would be interested in an app to track their personal carbon footprint to understand their impact on the environment.
- When surveyed in May 2020, 30% of Swedes stated that they had already chosen an alternative method of transport to avoid flying for environmental reasons and a further 34% stated that they had not done this, but are interested in taking this action in the future. Almost three in five Swedes say they are more likely to buy from companies which are working to reduce climate change.
- Booking.com's Sustainable Travel Report 2021 reveals that e.g. three quarters of Swedes are looking to reduce general waste on future trips and more than a third of Swedes have already shopped at small, independent stores to support the local economy on trips in the previous 12 months.



Sources: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves; Foresight Factory spring 2020 and 18th February - 15th April 2021; Booking.com Sustainable Travel Report 2021 (fieldwork March 2021); *The base for individual age groups may be small

3.3 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 of 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.
- The proportion of the Swedes who purchase tickets for sightseeing, performing arts or sports events before the trip was below the all market average across all categories. About one in five Swedes bought theatre, musical or concert tickets and more than one in three purchased tickets/passes for other tourist attractions during their trip in Britain.

>50%
of Swedish visitors booked within two months of their arrival in Britain

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Sweden	All markets
Online	98%	85%
Face-to-face	1%	10%
By phone	1%	4%
Don't know	0%	1%

- 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% Swedish 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 27%.

How trips to Britain were booked: accommodation only

Booking method	Sweden	All markets
Online	81%	70%
Face-to-face	1%	6%
By phone	1%	3%
Did not book/stayed with friends/relatives	15%	18%
Don't know	2%	2%

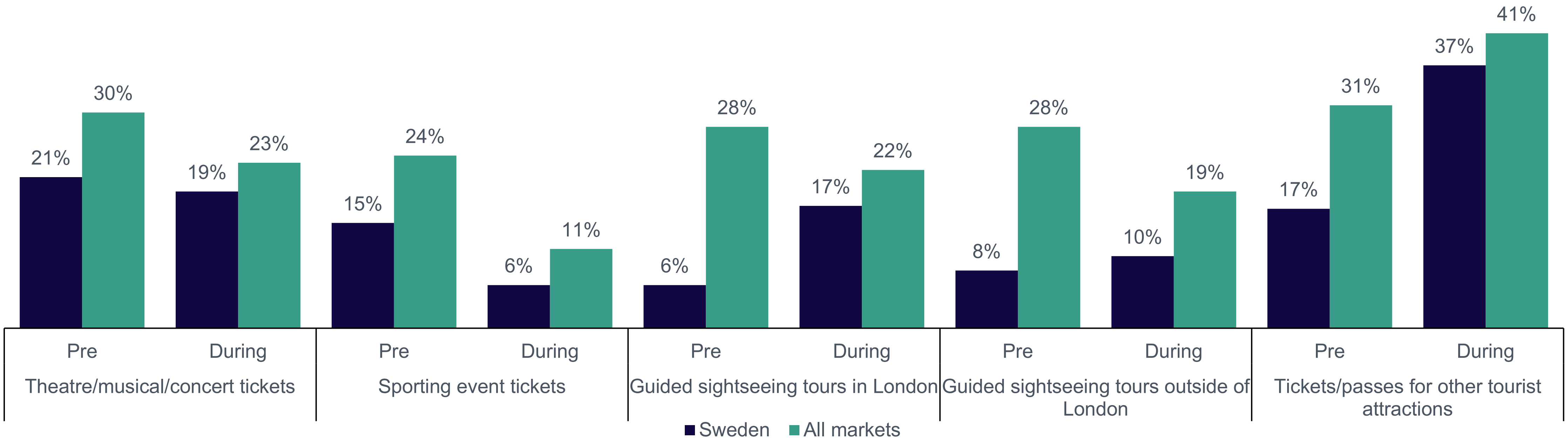
How trips to Britain were booked: travel + accommodation

Booking method	Sweden	All markets
Online	83%	64%
Face-to-face	9%	26%
By Phone	6%	9%
Don't know	3%	1%

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

3.3 Booking and planning: booking channels and ticket sales (2)

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.

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

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Sweden	All markets
6+ months	38%	49%
3-6 months	39%	31%
1-2 months	14%	13%
Less than 1 month	7%	5%
Don't know	3%	3%

Deciding on the destination

Lead time	Sweden	All markets
6+ months	30%	32%
3-6 months	35%	38%
1-2 months	25%	19%
Less than 1 month	8%	7%
Don't know	4%	3%

Looking at options/prices

Lead time	Sweden	All markets
6+ months	14%	21%
3-6 months	38%	37%
1-2 months	33%	27%
Less than 1 month	12%	12%
Don't know	4%	4%

Booking the trip

Lead time	Sweden	All markets
6+ months	7%	14%
3-6 months	36%	32%
1-2 months	34%	28%
Less than 1 month	19%	21%
Don't know	5%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- 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.

More than half of Swedes booked within two months of arrival in Britain even prior to the COVID-19 pandemic.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 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.
- More than a third of Swedes state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- Media consumption in Sweden has seen an increase in digital format usage, particularly boosted by the COVID-19 pandemic.
- While traditional TV watching declined in recent years, Swedes still watch an average of just about 2 hours per day.
- The Internet is now seen as the most important information source for Swedes ahead of TV, daily newspapers and radio.

Friends, family & colleagues

#1 Influence for the destination choice of the Swedes by far

Source: VisitBritain/IPSOS 2016, Myndigheten för press, radio och TV (Swedish Press, Radio and Television Authority): Medieutveckling 2020. Mediekonsumtion. Svenskarna och Internet 2020.

3.4 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) the two first (adult) ones accounting for almost 32% of the Swedish television market. Main commercial TV channels: TV 4 (23,7% market share (2020), TV3, Kanal 5, Sjuan, TV6 and TV8.
- Linear TV viewing time continues to decline, from 166 min in 2010 to 127 min in 2019. In 2010, an average of 71% watched television on a normal day but in 2019 it was only 56%.
- At the same time as fewer people are watching linear TV, more and more Swedes are using different play and streaming services. There are services that require subscriptions, such as Netflix, HBO, Viaplay and CMore, as well as subscription-free services such as Youtube and SVT Play. 69% of Swedes have a subscription to a streaming service.

Radio

- Public Service Sveriges Radio is the dominant player with 50% share of the radio audience market. National channels: P1 (news, culture and public affairs), P2 (classical music) and P3 (youth); regional channel P4 (news and current affairs in 25 regions, targets 40+ age group). Local commercial radio: MTG Radio and Bauer Media.
- The age group 60 to 79 years listen to the radio for 177 minutes and the 12- to 29-year-olds significantly less, 59 minutes an average day.
- To listen to podcasts is increasing, especially among younger people, whereas few older people have found them. In the age group 20-34 years, 30% listen to podcasts on an average day, compared with 3% in the age group 65 to 79 years.

Newspapers

- News consumption and newspaper reading have decreased for several years. The reading of digital newspapers continues to increase, while reading paper versions decreases. 31% of adults read a paper version of a newspaper and 48% online versions. The proportion of the population aged 9 to 79 who have access to a subscription of a newspaper has decreased from 64% in 2010, to 46% in 2019.
- Dailies published in the three metropolitan areas of Stockholm, Göteborg and Malmö: Dagens Nyheter, Svenska Dagbladet, 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 Dagblad, Dalarnas Tidningar, Nerikes Allehanda.
- Some of the newspapers have travel sections e.g. Svenska Dagbladet publishes one every Sunday.

Source: Myndigheten för press, radio och TV (Swedish Press, Radio and Television Authority): Medieutveckling 2020. Mediekonsumtion. Svenskarna och Internet 2020.

3.4 Reaching the consumer: magazines and online media

Magazines

- The proportion of Swedes who subscribe to a magazine is stable since 2016 due to the increase of digital subscriptions (2020).
- The readership of periodicals is stable: 36% of Swedes read some popular magazine/week while trade press is read by around 10% of Swedes/week.
- Swedish consumer travel magazines include Vagabond and Allt Om Resor.

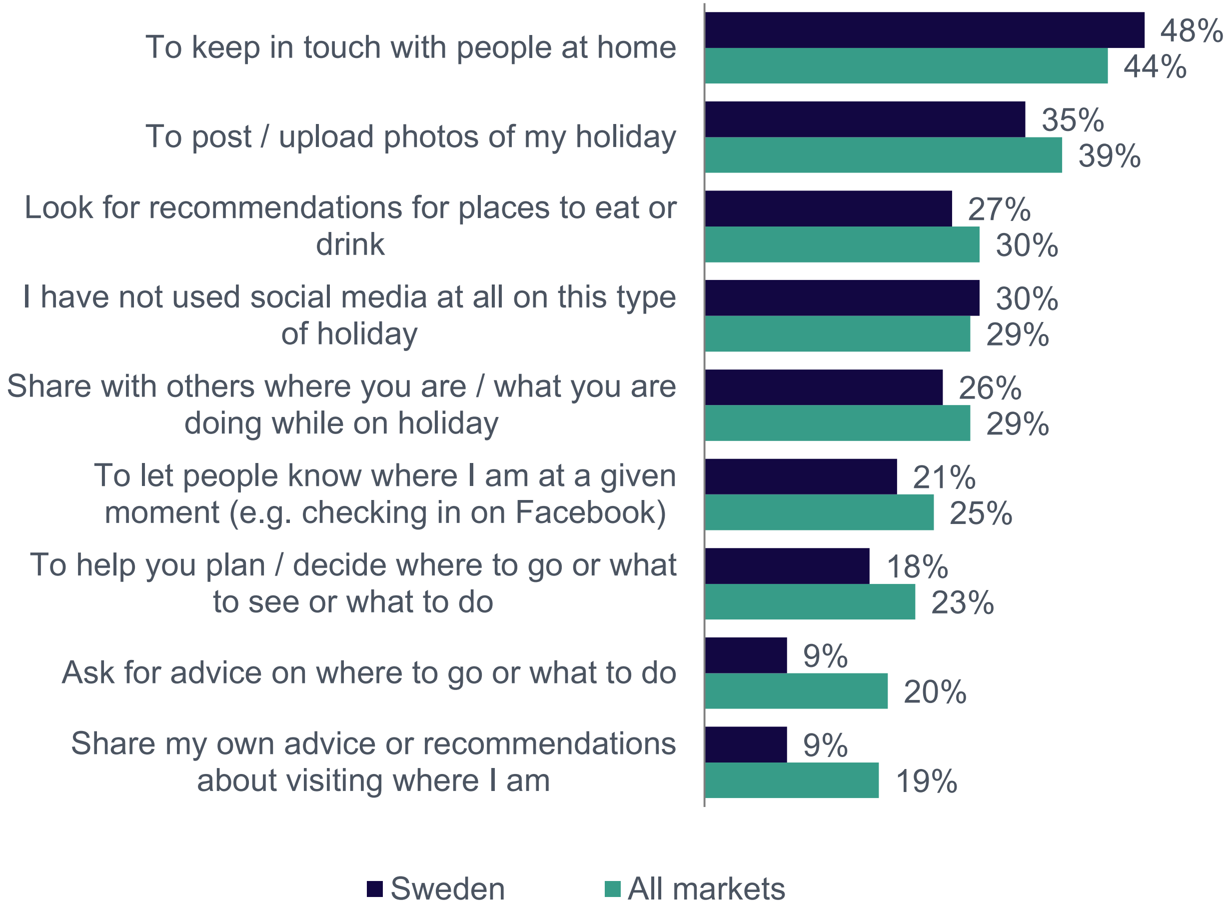
Media trends

- The Internet is now seen as the most important information source for Swedes ahead of TV, daily newspapers and radio.
- More and more of Swedish media consumption takes place on the digital platforms. This means that listening to streamed radio and podcasts increases, while listening to traditional radio decreases. Watching streaming TV services is also increasing, while traditional viewing is declining. Similarly, reading the newspaper digitally is increasing whereas fewer Swedes read paper editions.
- There is a big difference between the generations in the choice of platform used for news consumption. The younger generation likes to use Facebook (37%) and Youtube (31%) to get access to news. The older generation is more traditional and uses SVT public TV (81%) and the morning newspaper (56%) to tune in to news.
- 96% of Sweden's population uses the internet, and even more have become internet users during the pandemic. Older people (76 years and older) in particular have taken to the internet, and started using social media more than before, e-shopped and had video calls with relatives and friends. The elderly feel more social from the increased screen time, and that they are generally positive about the possibilities of digitalisation.
- Nearly 9 out of 10 (87%) internet users state that they bought something online during the pandemic. 2% answer that they have e-shopped something for the first time and a quarter (24%) state that they have e-shopped to a greater extent than before.
- Digital media services continue to grow, and traditional media such as television, radio and paper newspapers are declining. The TV channels' various play services are more popular than traditional TV viewing, and even more and more older people are using streaming video services. To listen, streaming music services like Spotify are the most popular, but also podcasting continues to increase.
- However, more and more internet users feel monitored on the internet, and there is also a growing concern that digital integrity will be violated by large companies or authorities.
- Throughout the pandemic, many Swedes have used the internet to experience cultural events broadcasted live. Many - especially the elderly - also want to continue to take part in live cultural events after the pandemic.

Source: Myndigheten för press, radio och TV (Swedish Press, Radio and Television Authority): Medieutveckling 2020. Mediekonsumtion. Svenskarna och Internet 2020.

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

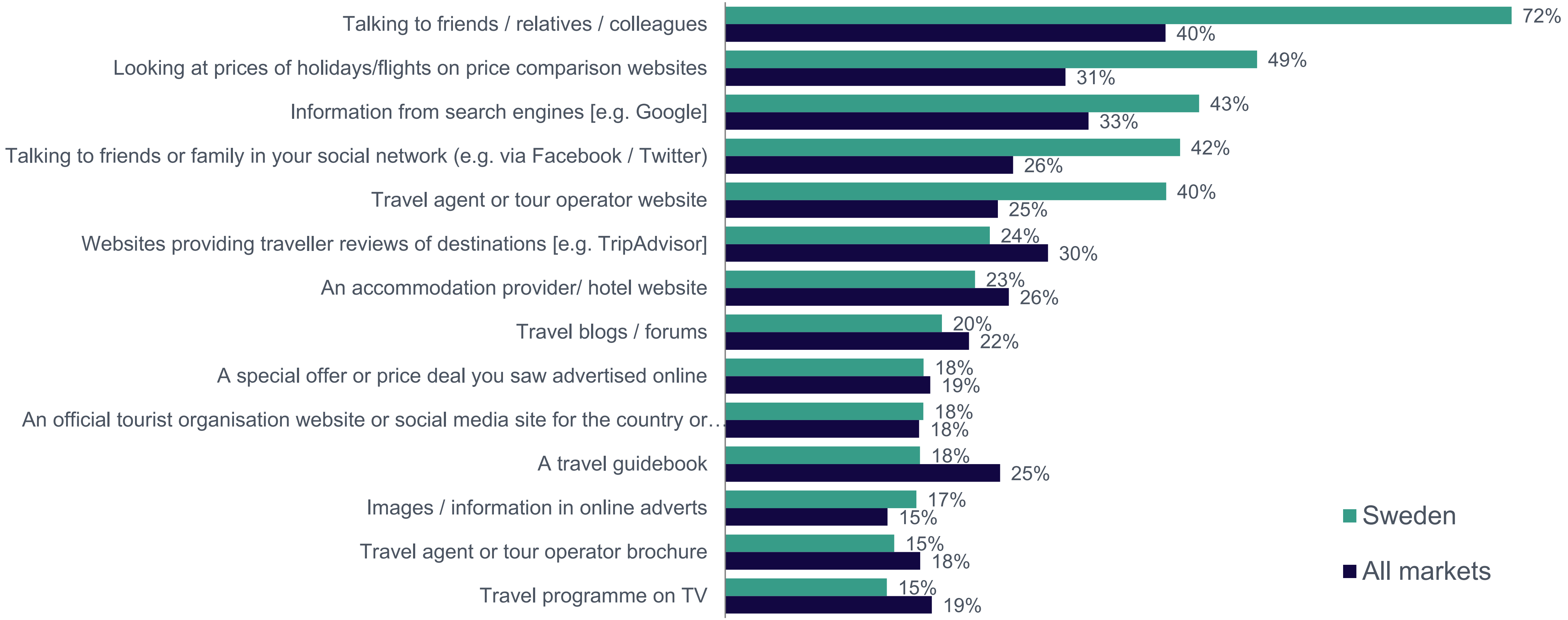


- As of May 2021, Facebook was by far the most used social network in Sweden, followed at significant distance by Instagram, Twitter, Pinterest and Youtube.
- Almost half like to keep in touch with people at home and about one in three like to post/upload their holiday photos.
- 60% like to stay connected 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)?, Statista May 2021

3.4 Reaching the consumer: influences (top 14)

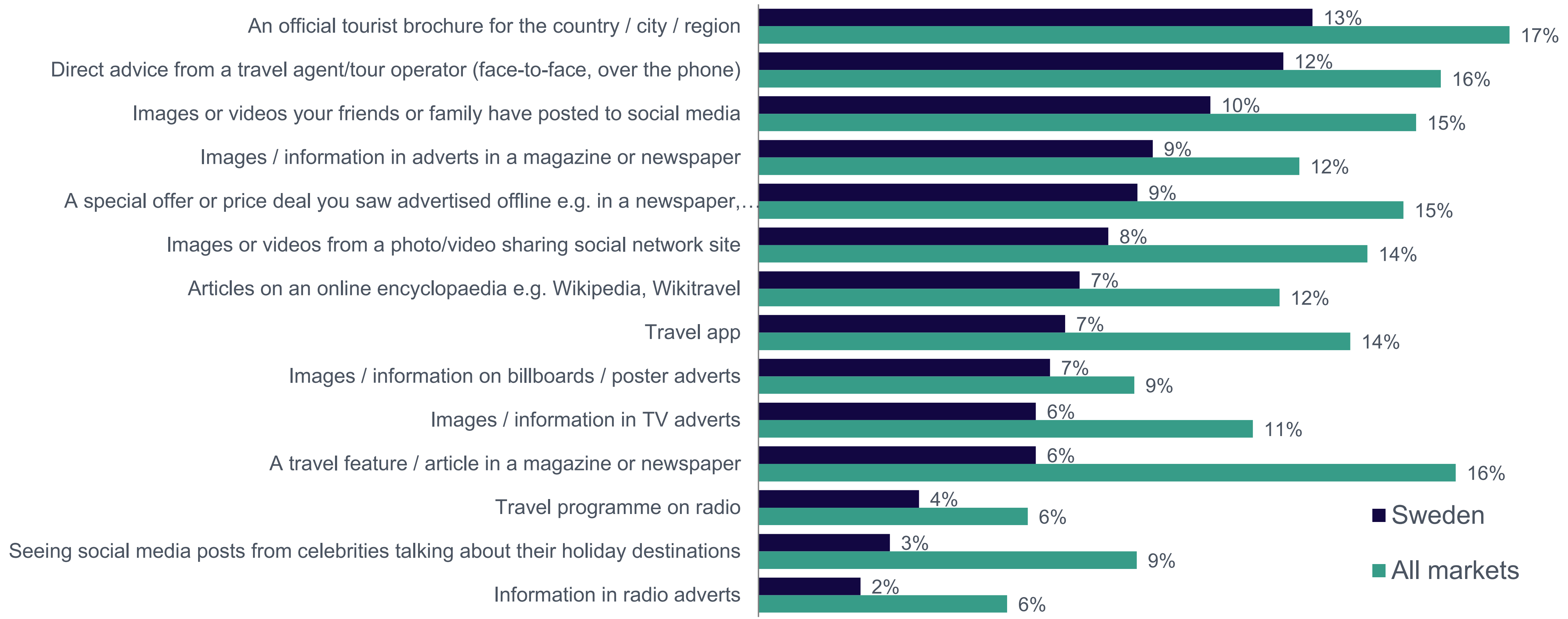
Influences on destination choice – top 14



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)

3.4 Reaching the consumer: influences (bottom 14)

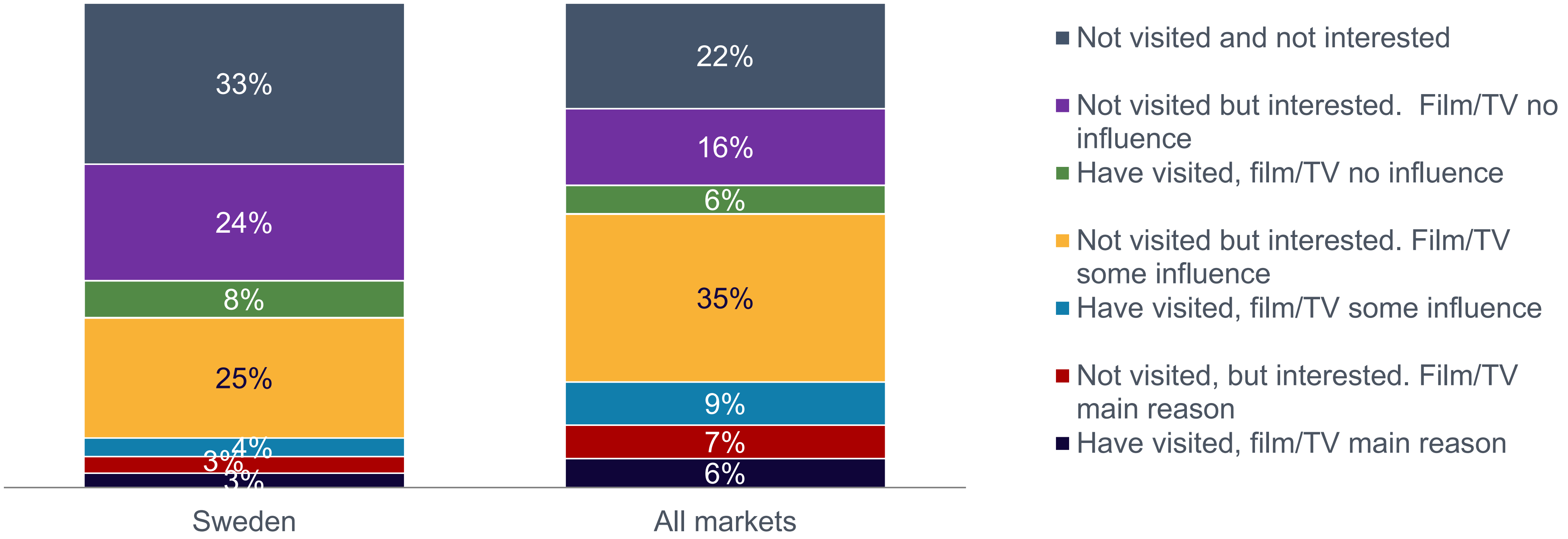
Influences on destination choice – bottom 14



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)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



- More than a third of Swedes state some degree of influence of literary, movie or TV locations on their holiday destination choice.

Source: Ipsos-Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Access and travel trade

Chapter 4

VisitBritain/ Guy Richardson

4.1 Access: key facts

- 98% of Swedish visits to the UK are made by plane. It is a short non-stop flight: usually about 1.5-2.5 hrs flight time.
- Annual seat capacity grew in recent years prior to the pandemic and peaked in 2018, but eased in the latest year to almost 1.7m airplane seats in 2019, before it fell sharply by 68% in 2020 as a result of the COVID-19 pandemic.
- Most flights come in through the Stockholm –London corridor.
- Seat capacity on routes from Sweden to the UK was mainly served by SAS, British Airways, Ryanair and Norwegian in 2019.
- Swedish visitors departing Britain by air pay £13 in Air Passenger Duty.
- A small proportion of Swedish inbound visits come to the UK via the Channel Tunnel (about 13,000 visits) in 2019.

Almost all visits from Sweden to the UK are made by plane.

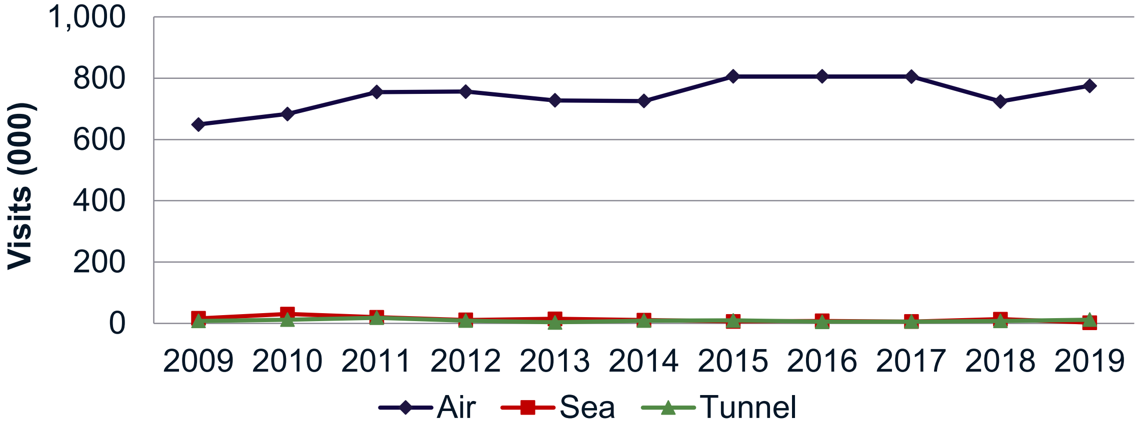
Access to Britain

Measure	2019
Weekly aircraft departures	188
Weekly seat capacity	32,344
Airports with direct routes in Sweden	6
Airports with direct routes in Britain	9

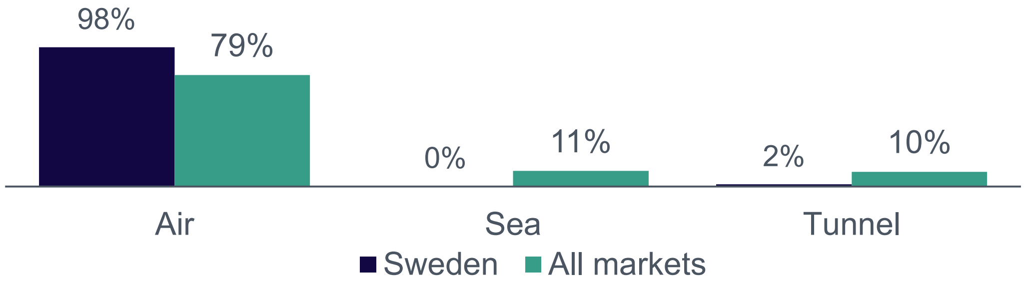
Source: Apex, non-stop flights only, International Passenger Survey by ONS

4.1 Access: mode of transport

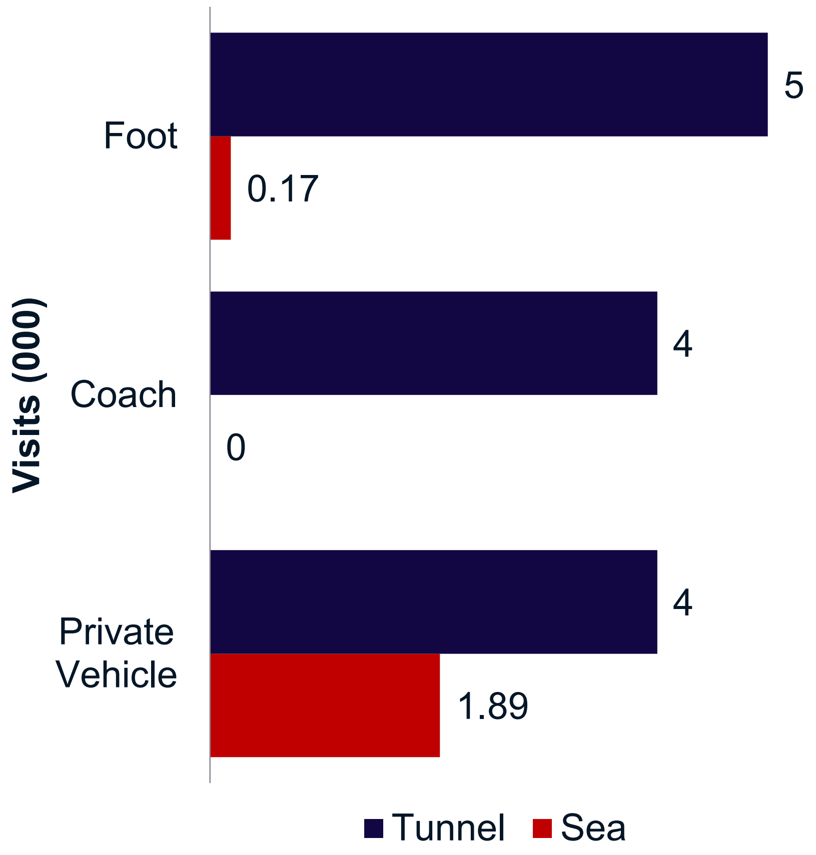
Visits by mode of transport



Annual share by mode (2019)



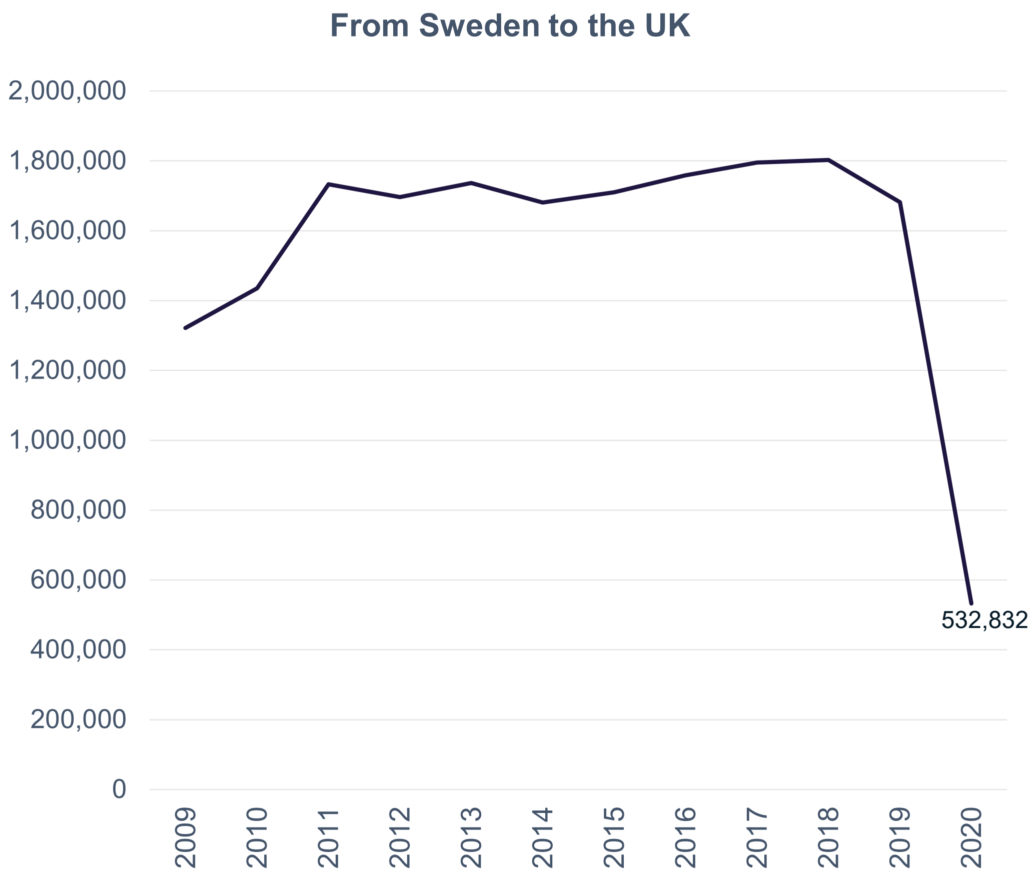
Sea and tunnel travel (000s) in 2019



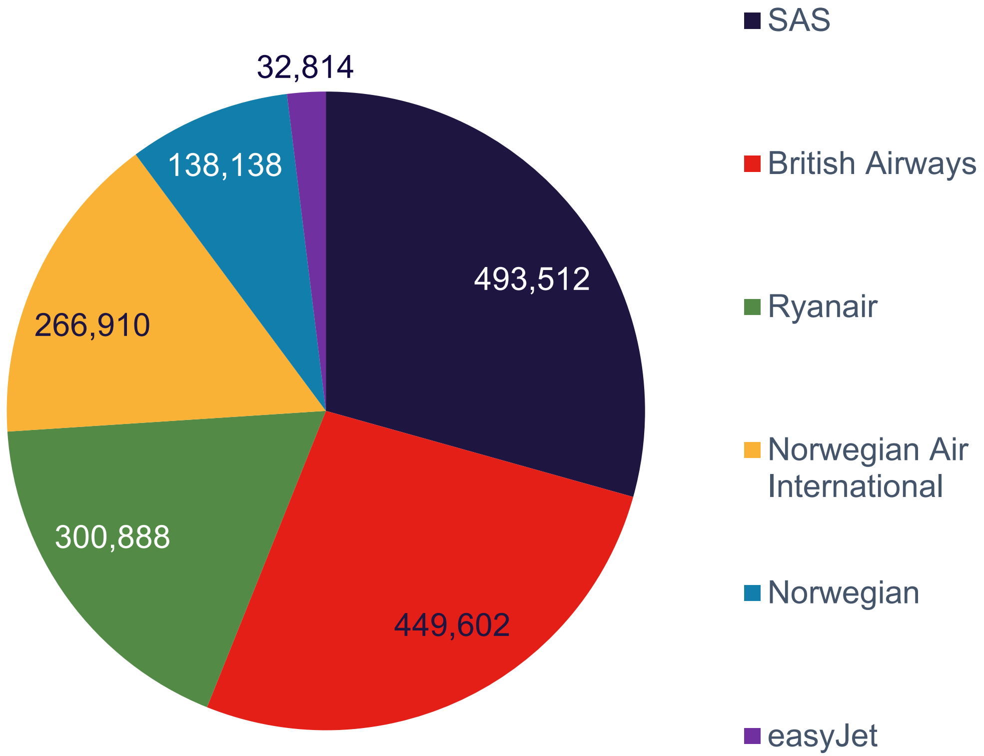
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

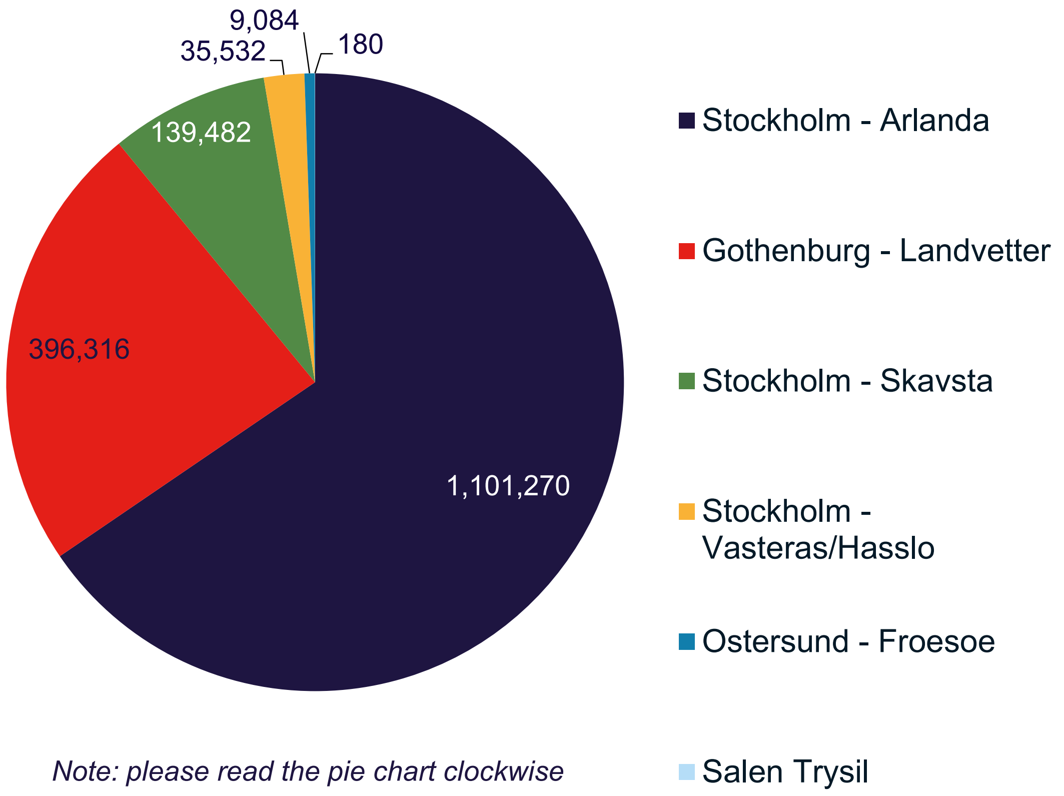


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only.

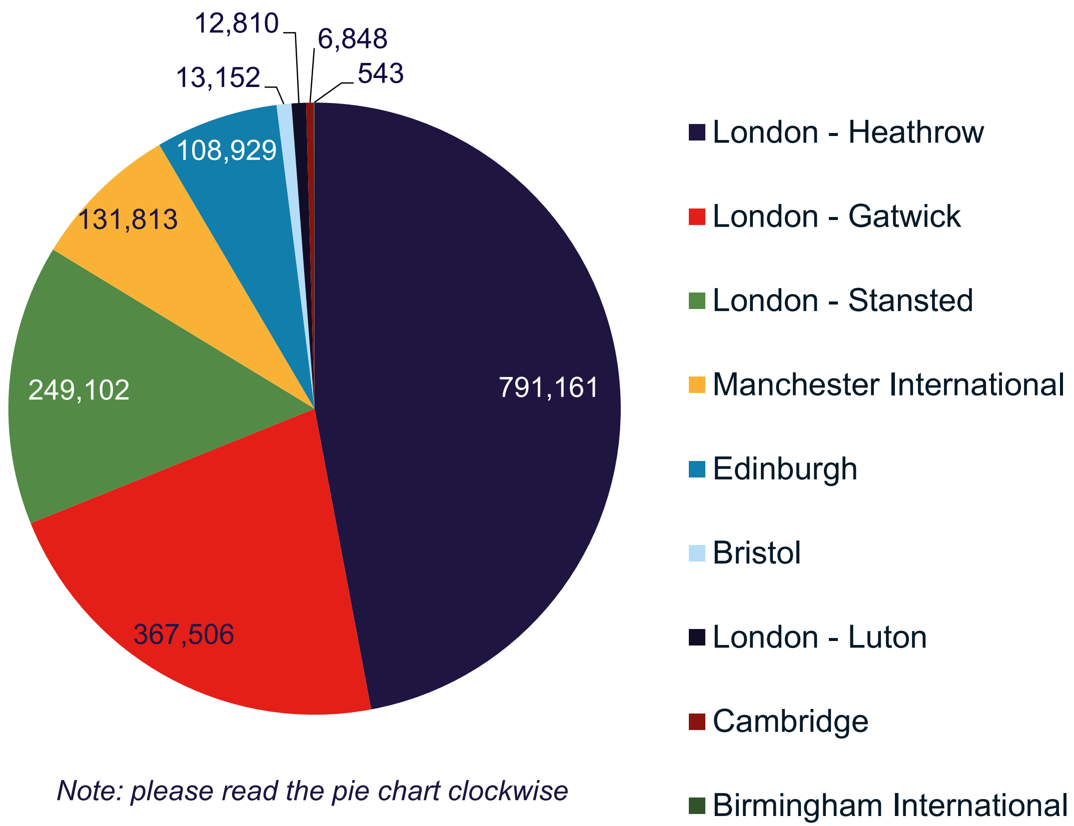
4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Destination airport seat capacity (2019)

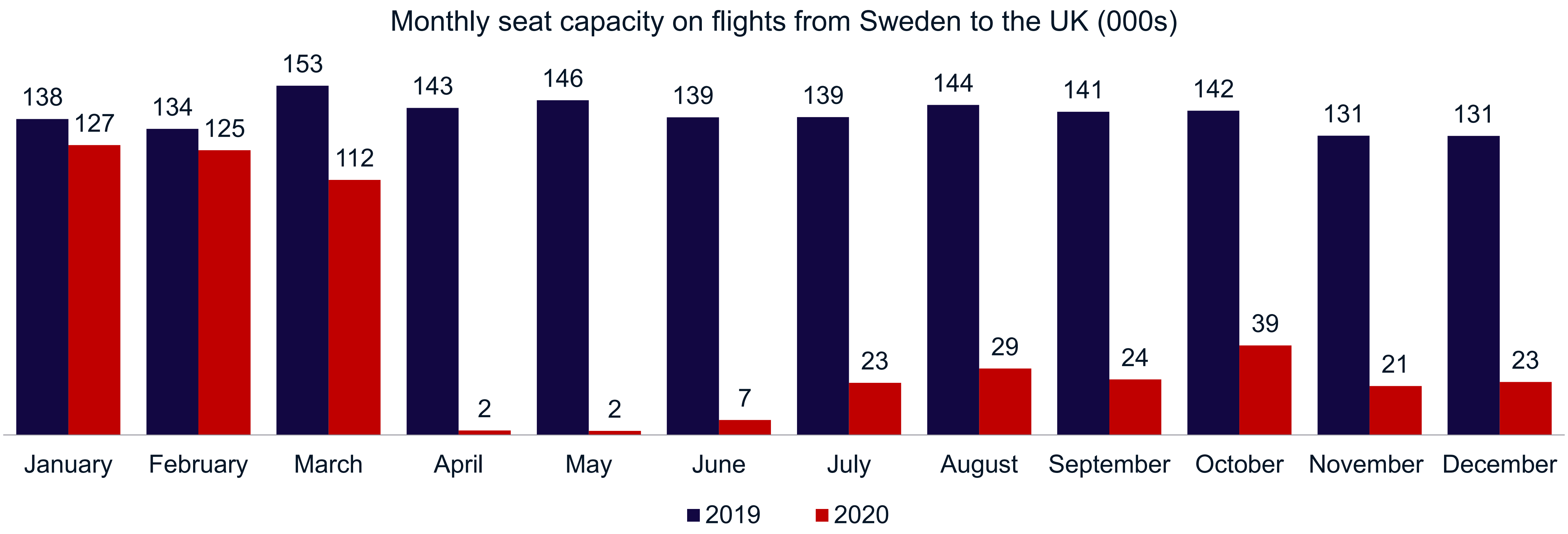


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity



- Seat capacity on non-stop flights between Sweden and the UK declined by 68% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most since April 2020, and monthly seat capacity was at least 72% behind 2019 levels in subsequent months.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview

- The key centre for travel trade is Stockholm; there are some operators in Gothenburg and Malmö. Malmö 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: tour operators charter operators, business travel and MICE operators, online operators and retail travel agents.
- There is a selection of smaller and specialist operators which are important to the UK.
- Tour operators generally prefer to contract directly with suppliers in the UK.
- 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).

Please note that the information provided in this section reflects the situation prior to the COVID-19 pandemic as fundamental market changes are still in progress and comprehensive data are yet to emerge.

Source: VisitBritain/IPSOS 2016, base: visitors

4.2 Travel trade: Swedish tour operators

Top 20 tour operators by turnover in Sweden in 2019

Selected operators which feature the UK as a destination	Turnover SEK (000s)
Thomas Cook North Europe	12,090,102
Tui Sverige	11,967,941
Der Touristik Nordic	6,406,652
Rolfs Flyg & Bussresor	723,169
Unlimited Travel Group	697,143
Nya Airtours City Breaks of Sweden	624,090
Sts Alpresor	566,130
Rk Travel Group	403,588
Educatius Group	342,767
Maxli Travel Group	328,124
Jambo Tours Scandinavia	309,919
Langley Travel	254,717
Sts Education	231,896
Sydafrikaresor I Helsingborg	176,622
Hummingbird	176,175
Select Travel	170,175
Detur Sweden	168,079
A Björks	167,134
Eventyr	157,372
Lotus Travel	150,752

Source: Travel News 27 April July 2021

4.2 Travel trade: Swedish holidays

National public holidays:

2021	2022	National public holidays
1 January	1 January	New Year's Day
6 January	6 January	Epiphany
2 April	15 April	Good Friday
4 April	17 April	Easter Sunday
5 April	18 April	Easter Monday
1 May	1 May	Labour Day
13 May	26 May	Ascension Day
23 May	5 June	Whit Sunday
6 June	6 June	National Day
26 June	25 June	Midsummer Day
6 November	5 November	All Saints Day
25 December	25 December	Christmas Day
26 December	26 December	Second Day of Christmas

Source: Officeholidays.com

4.2 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 vacations.
- Swedes generally speak excellent English – so language is not an issue.
- Swedes do not like hard sales, it is 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.

4.3 Caring for the consumer

Advice on caring for Swedish consumers

- Swedish perceptions of and satisfaction with British food tend to be lower than average. However, interest in trying some traditional British dishes is high including English breakfast, fish & chips and afternoon tea.
- 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.
- 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) as they are a market where environmental consciousness is increasingly important and has started to bring about behavioural change.
- Whilst many Swedes have good command of English information in their native language could make them feel more welcome, e.g. on guided tours. Currently this fell below expectations for about half of the Swedish visitors to the UK.

Source: International Passenger Survey 2016, GfK Anholt Nation Brands Index 2015, Vagabond Travel Barometer

Useful links and further information

Appendix

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Appendix 1: Working with VisitBritain (1)

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 partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- 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 or trade website

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)

or VisitBritain shop team
(Email: product@visitbritain.org)

VisitBritain VisitEngland

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

DCMS's Tourism Recovery Plan

Appendix 1: Working with VisitBritain (3)

VisitBritain’s global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers’ market. On the right is a summary of VisitBritain’s 5 global audience segments. To learn more visit our page on understanding our customers.

- In Sweden, VisitBritain focuses on two audience segments among the international travellers:
  - **Buzzseekers in Sweden:** active, enjoy foreign cultures. Motivated by cultural attractions, ease of access, vibrant cities, and a variety of places to visit.
  - **Explorers in Sweden:** mature and open-minded with high interest in culture, arts and history. Enjoy a variety of holidays from seaside, lakes & mountains to gentle activities.

Segments (& global attributes)	Global market share	Market share in Sweden
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	18%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	31%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	19%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	13%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	20%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

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

To find out more about Sweden or other inbound markets browse our:

Markets & segments

Inbound research & insights

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

VisitBritain VisitEngland

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- COVID-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

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Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the 1 October 2021 update of the 'Global Travel Service' databank. Other information on Sweden and the Eurozone were updated 17 September 2021.
- **Apex** data was last updated with June 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, July 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

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Market and Trade Profile: Sweden

October 2021

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