Market and Trade Profile: Sweden

Sweden – March 2020
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 Swedes 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 laid out, 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.
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Executive summary
1: Inbound market statistics

Chapter summary
The Swedish outbound market is forecasted to account for more than 21 million trips abroad with at least one overnight stay by 2028. The UK was the fifth most popular destination behind Spain, Denmark, Norway, and Germany for such trips in 2018. The Swedish rank globally in 20th place for international tourism expenditure with more than US$15.3bn. Sweden was the 13th largest inbound source market for the UK for volume and 16th most valuable for spend in 2018. Swedish holiday visitors spend more per night than an average visitor. Swedish visits are often short stays; those who have spent four to seven nights in the UK set a new volume record in 2018. London is the leading destination for a trip to the UK, accounting for about half of Swedish visitor nights (51%), but Scotland, South East, North West and South West are also popular based on the average nights spent in the UK 2016-2018.

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips), UNWTO, VisitBritain/IPSOS 2016

2018: £447m spend in UK
2: Experiences and perceptions

Chapter summary
Dining in restaurants, shopping and going to the pub feature among the most popular activities of Swedish visits in the UK. More than three in five Swedes on holiday in the UK spend time sightseeing famous monuments/buildings; many visit a park or garden, a museum or art gallery, or a castle or historic house, about a third go on a guided tour. Swedish holidays are also more likely than average to feature the performing arts. Almost a third of Swedish visits include socialising with locals.

46,000 Swedish visits per annum feature time watching live football.

97% of Swedish visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

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

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.

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.

Swedish customers are very environmentally conscious and this has started to bring about behavioural change with increased use of train travel and fewer flights as well as more domestic holidays.

Source: VisitBritain/IPSOS 2016, Vagabond Travel Barometer
4: Access and travel trade

Chapter summary

Access to Britain is easy. 97% of Swedish visits were made by plane.

Annual seat capacity grew in recent years and peaked in 2018, but eased in the latest year to almost 1.7m airplane seats in 2019. Most flights come in through the Stockholm – London corridor, and SAS, British Airways, Norwegian and Ryanair accounting for most of the seat capacity.

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, non-stop flights only
Chapter 1: Inbound market statistics
Chapter 1.1: Key statistics

Key insights
Sweden is Britain’s 13th largest source market in terms of visits and 16th most valuable for visitor spending (2018). Swedish holiday visitors have an above average spend per night while visiting the UK. 57% of total spending came from holiday trips and 15% from business visits in 2018.

Short trips up to one week are the most popular length of stay, and Swedish visits staying four to seven nights in the UK set a new volume record in 2018.

London is the leading destination for a trip to Britain but Scotland, South East, North West and South West are also popular (based on average nights in the UK 2016-2018).

The most popular activities undertaken by Swedish travellers in Britain include dining in restaurants, shopping, going to the pub, sightseeing famous monuments/buildings, visiting parks and gardens, socialising with locals, visiting museums and art galleries, or castles and historic houses.

Source: International Passenger Survey by ONS, Oxford Economics overnight trips
### 1.1 Key statistics: global context and 10 year trend

**Global context**

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>15.3</td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>20</td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>14.8</td>
</tr>
<tr>
<td>Most visited destination</td>
<td>Spain</td>
</tr>
</tbody>
</table>

**Inbound travel to the UK overview**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 year trend</td>
<td>+11%</td>
<td>+8%</td>
<td>+26%</td>
</tr>
<tr>
<td>2008</td>
<td>743</td>
<td>3,563</td>
<td>354</td>
</tr>
<tr>
<td>2009</td>
<td>604</td>
<td>3,278</td>
<td>253</td>
</tr>
<tr>
<td>2010</td>
<td>758</td>
<td>3,743</td>
<td>357</td>
</tr>
<tr>
<td>2011</td>
<td>794</td>
<td>4,318</td>
<td>410</td>
</tr>
<tr>
<td>2012</td>
<td>777</td>
<td>3,652</td>
<td>383</td>
</tr>
<tr>
<td>2013</td>
<td>784</td>
<td>4,193</td>
<td>441</td>
</tr>
<tr>
<td>2014</td>
<td>869</td>
<td>4,042</td>
<td>503</td>
</tr>
<tr>
<td>2015</td>
<td>850</td>
<td>3,914</td>
<td>510</td>
</tr>
<tr>
<td>2016</td>
<td>821</td>
<td>3,905</td>
<td>458</td>
</tr>
<tr>
<td>2017</td>
<td>831</td>
<td>3,661</td>
<td>451</td>
</tr>
<tr>
<td>2018</td>
<td>827</td>
<td>3,836</td>
<td>447</td>
</tr>
</tbody>
</table>

**Share of UK total in 2018**

<table>
<thead>
<tr>
<th>Measure</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of UK total in 2018</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics
1.1 Key statistics – volume and value

### Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
<th>Change vs. 2017</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>827</td>
<td>-0.4%</td>
<td>13</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>3,836</td>
<td>+5%</td>
<td>17</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>447</td>
<td>-1%</td>
<td>16</td>
</tr>
</tbody>
</table>

The UK welcomed 577,000 Swedish visits in the first nine months of 2019 (-8% on Jan-Sep 2018). Visitors from Sweden spent £285m in the UK in the first nine months (-21% on Jan-Sep 2018). Swedes visiting friends/relatives in the UK in Jan-Sep 2019 set new volume and value records.*

### Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2018</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>4</td>
<td>£142</td>
<td>£594</td>
</tr>
<tr>
<td>Business</td>
<td>3</td>
<td>£149</td>
<td>£420</td>
</tr>
<tr>
<td>Visiting Friends/Relatives</td>
<td>6</td>
<td>£54</td>
<td>£309</td>
</tr>
<tr>
<td>Miscellaneous**</td>
<td>4</td>
<td>£179</td>
<td>£645</td>
</tr>
<tr>
<td>All visits</td>
<td>5</td>
<td>£117</td>
<td>£540</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, *provisional data for January-September 2019
**small base – may only be used as indicative
1.1 Key statistics: journey purpose

Just over half of all Swedish visits to the UK were made for holiday purposes (52%), followed by 22% of visits made to visit friends and/or relatives and 20% for business purposes in 2018. Holiday visits from Sweden have led in terms of volume at some distance. They had peaked in 2014 at 437,000 and recovered to 428,000 in 2018 after a mixed picture in between. Swedish visits to friends and/or relatives living in the UK set a record in 2016 at 201,000, and have since declined by 8% to 184,000 in 2018. In 2018, 57% of Swedish visitor spending came courtesy of holiday visitors, 15% from business visits, and 13% from visits to friends and/or relatives. Swedish holiday visitors spent £142 per night in 2018, more than an average holiday visitor to the UK (£118).

Whilst the volume of business visits is yet to catch up with its pre-financial-crisis level, their spend had set a new record in 2015 at £185m, but declined since.

Looking at growth over the past decade (comparing 2008 and 2018), Swedish holiday visits to the UK have increased in volume by 52% and visits to friends/relatives by 6%. In the same timeframe, business visits declined by 20% and miscellaneous visits by 36%.

Source: International Passenger Survey by ONS
1.1 Key statistics: seasonality

In 2018, 31% of the UK’s visits from Sweden were made in the third quarter (Jul-Sep, traditional high season), setting new volume and value records, though historically Q3 has often not been the biggest quarter. These were followed by 27% of visits made in the second quarter (Apr-Jun) and 24% in the fourth quarter of 2018. 18% of visits took place in the first quarter. Swedish visits to the UK in the first half of 2018 declined year-on-year, while visits in the new record-setting third quarter grew strongly by 19%. The last quarter of 2018 showed some moderate volume growth of Swedish visits to the UK (+3% on the last quarter of 2017).

Source: International Passenger Survey by ONS
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2018 (nights, %share)

- Hotel/guest house: 45%
- Free guest with relatives or friends: 32%
- Hostel/university/school: 9%
- Bed & Breakfast: 4%
- Camping/caravan: 4%
- Rented house/flat: 3%
- Other: 2%
- Paying guest family or friends house: 0%
- Own home: 0%

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. Over the past decade (comparing 2008 and 2018) Swedish trips of 4-7 nights have shown the strongest growth (+56%), whilst other lengths of trips have declined in volume. Swedish visits in the UK of 4-7 nights set a new volume record in 2018 at 349,000.

Two forms of accommodation dominate the picture with more than three quarters of Swedish visitor nights spent at a hotel/guest house (45%) or staying as a free guest with family/friends (32%).

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*

<table>
<thead>
<tr>
<th>Region</th>
<th>67%</th>
<th>82%</th>
<th>79%</th>
<th>78%</th>
<th>76%</th>
<th>63%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All markets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Proportion of visits that are bought as part of a package or all-inclusive tour in 2018**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Holiday</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>VFR</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Misc.</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>All journey</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>purposes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

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.

Sources: International Passenger Survey by ONS. *2015, excluding UK nationals; **See definition of a package holiday in appendix (p.83)
### 1.2 Getting around Britain

**Average annual visits to the UK (2016-2018)**

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>3,801</td>
<td>826</td>
<td>451</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>448</td>
<td>95</td>
<td>53</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>82</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>1,937</td>
<td>491</td>
<td>264</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>23</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>309</td>
<td>70</td>
<td>34</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>82</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>141</td>
<td>29</td>
<td>13</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>56</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>107</td>
<td>37</td>
<td>12</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>279</td>
<td>39</td>
<td>21</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>320</td>
<td>82</td>
<td>36</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS
1.2 Getting around Britain: regional spread and top towns and cities

Top towns and cities visited

<table>
<thead>
<tr>
<th>Town</th>
<th>Visits (000s, 2016-2018 average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>491</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>73</td>
</tr>
<tr>
<td>Manchester</td>
<td>34</td>
</tr>
<tr>
<td>Liverpool</td>
<td>20</td>
</tr>
<tr>
<td>Glasgow</td>
<td>16</td>
</tr>
</tbody>
</table>

Regional spread (2018, % nights)

- Scotland: 16% Sweden, 9% All markets
- Wales: 3% Sweden, 2% All markets
- London: 45% Sweden, 42% All markets
- Rest Of England: 36% Sweden
- Northern Ireland: 46% Sweden, 0.3% All markets, 0.9% All markets

London is the leading destination for a trip to the UK, accounting for about half of Swedish visitor nights (51%), but Scotland, South East, North West and South West are also popular based on the average nights spent in the UK 2016-2018.

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.

10% of visits from Sweden were bought as part of a package or all-inclusive tour, slightly above the all market average. Of the various journey purposes, Swedish miscellaneous visits were the most likely to have been bought this way (18%). Most Swedish visits to the UK were organised independently in 2018.
1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

- **VFR: Went to the coast or beaches**
  - Sweden: 12%
  - All markets: 13%

- **VFR: Went to countryside or villages**
  - Sweden: 17%
  - All markets: 17%

- **Holiday: Went to the coast or beaches**
  - Sweden: 10%
  - All markets: 14%

- **Holiday: Went to countryside or villages**
  - Sweden: 13%
  - All markets: 18%

- **All journey purposes: Went to the coast or beaches**
  - Sweden: 8%
  - All markets: 10%

- **All journey purposes: Went to countryside or villages**
  - Sweden: 11%
  - All markets: 13%

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

- **Ferry/boat**: 1% (Sweden), 0% (All markets)
- **Car/vehicle you/group brought to the UK**: 0% (Sweden), 0% (All markets)
- **Hired self-drive car/vehicle**: 5% (Sweden), 5% (All markets)
- **Private coach/minibus (for group only)**: 2% (Sweden), 2% (All markets)
- **Public bus/coach (outside town/city)**: 5% (Sweden), 5% (All markets)
- **Uber or similar app**: 9% (Sweden), 10% (All markets)
- **Taxi**: 27% (Sweden), 23% (All markets)
- **Train (outside town/city)**: 30% (Sweden), 33% (All markets)
- **Bus, Tube, Tram or Metro Train (within town/city)**: 48% (Sweden), 59% (All markets)
- **Domestic flight**: 1% (Sweden), 1% (All markets)

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 (%)

Swedish visitors are very comfortable with taking public transport while in the UK. These travellers have an above-average propensity to use public transport while they are in Britain, both in and outside of cities.

The majority of Swedish respondents buy their tickets for transport in Britain whilst they are here (with the exception of domestic flights and car hire), especially transport within London, airport transfers and train tickets.

Airport transfers are also the method of transport in the set which is most likely to be pre-booked with 25% of visitors reserving them in advance.
1.3 Visitor demographics

Visitor characteristics

Almost seven-in-ten Swedish business visitors are male, while the picture is more balanced for holiday visits and VFR visitors are more likely to be female.

Almost four-in-five holiday visitors are making a repeat visit to Britain (excl. UK nationals).

Most visitors live in or around Stockholm or in Southern Sweden.

Almost a third of Swedish visits are made by travellers accompanied by their partners or spouses (30%), and a similar proportion travelling on their own. The share of those travelling to the UK with adult friends, adult family members, or children is slightly above the all-market average.

Most visits from Swedish residents to the UK were made by Swedish nationals (89%), 5% by British nationals.

Source: International Passenger Survey by ONS, *2015, excluding British nationals

79% of Swedish holiday visitors have been to the UK before*
1.3 Visitor demographics: gender and age groups

### Gender ratio of visits (2018):

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>All markets</td>
<td>41%</td>
<td>57%</td>
</tr>
<tr>
<td>Sweden</td>
<td>44%</td>
<td>53%</td>
</tr>
</tbody>
</table>

### Gender ratio of visits from Sweden by journey purpose (2018):

- **Misc.**
  - Male: 63%
  - Female: 37%
- **VFR**
  - Male: 37%
  - Female: 63%
- **Holiday**
  - Male: 53%
  - Female: 42%
- **Business**
  - Male: 69%
  - Female: 30%

### Age group trend (visits in 000s)

<table>
<thead>
<tr>
<th>Year</th>
<th>0-15</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
<th>Not Known</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>6</td>
<td>101</td>
<td>180</td>
<td>200</td>
<td>148</td>
<td>75</td>
<td>60</td>
<td>34</td>
</tr>
<tr>
<td>2017</td>
<td>27</td>
<td>98</td>
<td>180</td>
<td>169</td>
<td>176</td>
<td>119</td>
<td>60</td>
<td>0</td>
</tr>
<tr>
<td>2016</td>
<td>33</td>
<td>104</td>
<td>183</td>
<td>184</td>
<td>186</td>
<td>78</td>
<td>53</td>
<td>0</td>
</tr>
<tr>
<td>2015</td>
<td>43</td>
<td>107</td>
<td>167</td>
<td>188</td>
<td>196</td>
<td>98</td>
<td>48</td>
<td>0</td>
</tr>
<tr>
<td>2014</td>
<td>29</td>
<td>112</td>
<td>152</td>
<td>200</td>
<td>210</td>
<td>111</td>
<td>54</td>
<td>0</td>
</tr>
<tr>
<td>2013</td>
<td>27</td>
<td>98</td>
<td>144</td>
<td>185</td>
<td>183</td>
<td>108</td>
<td>37</td>
<td>0</td>
</tr>
<tr>
<td>2012</td>
<td>22</td>
<td>94</td>
<td>175</td>
<td>165</td>
<td>178</td>
<td>101</td>
<td>41</td>
<td>0</td>
</tr>
<tr>
<td>2011</td>
<td>9</td>
<td>113</td>
<td>156</td>
<td>187</td>
<td>166</td>
<td>107</td>
<td>46</td>
<td>0</td>
</tr>
<tr>
<td>2010</td>
<td>6</td>
<td>83</td>
<td>156</td>
<td>170</td>
<td>185</td>
<td>106</td>
<td>41</td>
<td>0</td>
</tr>
<tr>
<td>2009</td>
<td>29</td>
<td>77</td>
<td>112</td>
<td>139</td>
<td>126</td>
<td>86</td>
<td>34</td>
<td>0</td>
</tr>
<tr>
<td>2008</td>
<td>32</td>
<td>69</td>
<td>167</td>
<td>201</td>
<td>143</td>
<td>94</td>
<td>37</td>
<td>0</td>
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<tr>
<td>2007</td>
<td>35</td>
<td>83</td>
<td>169</td>
<td>185</td>
<td>145</td>
<td>103</td>
<td>28</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>34</td>
<td>97</td>
<td>168</td>
<td>157</td>
<td>124</td>
<td>112</td>
<td>23</td>
<td>0</td>
</tr>
<tr>
<td>2005</td>
<td>33</td>
<td>81</td>
<td>156</td>
<td>165</td>
<td>157</td>
<td>107</td>
<td>28</td>
<td>0</td>
</tr>
<tr>
<td>2004</td>
<td>37</td>
<td>73</td>
<td>147</td>
<td>143</td>
<td>114</td>
<td>58</td>
<td>12</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, % share of ‘don’t know’ for gender ratio not displayed – these visits are also excluded from the age group trend.
1.3 Visitor demographics: travel companions

Who have Swedish visitors to the UK travelled with?

- Travelling on own: 43%, 29%
- Spouse/partner: 30%, 28%
- Adult friend(s): 13%, 9%
- Adult family member(s): 14%, 12%
- Business colleague(s): 5%, 5%
- Part of a tour group: 3%, 4%
- Child(ren) - any: 15%, 13%

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 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 sparsely 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 2019
1.4 The UK and its competitors

Market size, share and growth potential

Britain was the 5th most visited destination by Swedish travellers in 2018, behind Spain, Denmark, Norway and Germany.

Forecasts suggest there is potential for more than 40% growth in the number of Swedish outbound overnight trips between 2018 and 2028. The number of visits to Britain is also forecasted to grow by 17% over this period.

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.

68% of Swedish trips are taken for travel within Sweden.

Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Statistics Sweden
1.4 The UK and its competitors

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

Historic and potential visits to the UK (000s)

<table>
<thead>
<tr>
<th>Country</th>
<th>2028</th>
<th>2018</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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.
Chapter 2: Experiences and perceptions
2.1 Inbound activities

Almost four in five Swedish visits involve dining in restaurants; almost three in five go shopping. Going to the pub is also very popular with about half of Swedes.

More than three in five Swedes on holiday in the UK spend time sightseeing famous monuments and buildings with many involving a trip to a park or garden, a castle or historic house, or a museum or art gallery. About a third of Swedish holiday visits feature a guided tour.

Almost a third of Swedish visits include socialising with locals. Swedish visits also have an above-average propensity to feature the performing arts.

46,000 Swedish visits per annum feature time watching live football.

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 locals
7. Visiting museums and art galleries
8. Visiting castles or historic houses
9. Going for a walk, hike or ramble
10. Going on a guided tour

For more information on activities, please consult: visitbritain.org/activities-undertaken-britain

Source: International Passenger Survey by ONS, rankings based on 2007-2017 data
2.1 Inbound activities

Propensity to visit museums and art galleries

- **VFR: visited museums and art galleries**
  - Sweden: 23%
  - All markets: 23%

- **Holiday: visited museums and art galleries**
  - Sweden: 43%
  - All markets: 48%

- **All journey purposes: visited museums and art galleries**
  - Sweden: 28%
  - All markets: 28%

Propensity to visit built heritage sites

- **VFR: visited religious buildings**
  - Sweden: 18%
  - All markets: 18%

- **VFR: visited castles/historic houses**
  - Sweden: 24%
  - All markets: 23%

- **Holiday: visited religious buildings**
  - Sweden: 23%
  - All markets: 35%

- **Holiday: visited castles/historic houses**
  - Sweden: 45%
  - All markets: 48%

- **All journey purposes: visited religious buildings**
  - Sweden: 16%
  - All markets: 20%

- **All journey purposes: visited castles/historic houses**
  - Sweden: 28%
  - All markets: 28%

Source: International Passenger Survey by ONS, 2016
2.1 Inbound activities

Propensity to attend the performing arts

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: attended a live music event</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>All journey purposes: attended a live music event</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>All journey purposes: attended a festival</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>All journey purposes: went to the theatre/musical/opera/ballet</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>VFR: attended a festival</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>VFR: went to the theatre/musical/opera/ballet</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Holiday: attended a festival</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Holiday: went to the theatre/musical/opera/ballet</td>
<td>19%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

- Football: 46
- Rugby: 2
- Cricket: 3

Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live). NB data for watching individual sports is based on a small sample size.
2.1 Inbound activities

**Propensity to go for a walk**

- **Holiday: Walking along the coast**
  - Sweden: 10%
  - All markets: 11%

- **Holiday: Walking in the countryside**
  - Sweden: 19%
  - All markets: 26%

- **VFR: Walking along the coast**
  - Sweden: 9%
  - All markets: 11%

- **VFR: Walking in the countryside**
  - Sweden: 31%
  - All markets: 28%

- **All journey purposes: Walking along the coast**
  - Sweden: 7%
  - All markets: 8%

- **All journey purposes: Walking in the countryside**
  - Sweden: 18%
  - All markets: 20%

**Propensity to visit a park or garden, or a national park**

- **Holiday: Visiting a National Park**
  - Sweden: 12%
  - All markets: 11%

- **All journey purposes: Visiting a National Park**
  - Sweden: 8%
  - All markets: 7%

- **VFR: Visiting parks or gardens**
  - Sweden: 39%
  - All markets: 32%

- **Holiday: Visiting parks or gardens**
  - Sweden: 50%
  - All markets: 50%

- **All journey purposes: Visiting parks or gardens**
  - Sweden: 35%
  - All markets: 32%

Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)
2.1 Inbound activities

Propensity to go to a pub, and to socialise with locals

- VFR: went to bars or night clubs
  - Sweden: 13%
  - All markets: 14%

- VFR: dining in restaurants
  - Sweden: 79%
  - All markets: 62%

- Holiday: went to bars or night clubs
  - Sweden: 14%
  - All markets: 15%

- Holiday: dining in restaurants
  - Sweden: 88%
  - All markets: 70%

- Business: went to bars or night clubs
  - Sweden: 5%
  - All markets: 6%

- Business: dining in restaurants
  - Sweden: 64%
  - All markets: 49%

- All journey purposes: went to bars or night clubs
  - Sweden: 13%
  - All markets: 12%

- All journey purposes: dining in restaurants
  - Sweden: 78%
  - All markets: 61%

Propensity to go to restaurants, or bars and night clubs

- VFR: socialising with the locals
  - Sweden: 55%
  - All markets: 45%

- VFR: went to pub
  - Sweden: 49%
  - All markets: 49%

- Holiday: socialising with the locals
  - Sweden: 26%
  - All markets: 32%

- Holiday: went to pub
  - Sweden: 54%
  - All markets: 48%

- Business: socialising with the locals
  - Sweden: 19%
  - All markets: 15%

- Business: went to pub
  - Sweden: 25%
  - All markets: 24%

- All journey purposes: socialising with the locals
  - Sweden: 31%
  - All markets: 32%

- All journey purposes: went to pub
  - Sweden: 51%
  - All markets: 42%

Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)
2.1 Inbound activities

Propensity to go shopping

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>All journey purposes:</td>
<td>59%</td>
<td>54%</td>
</tr>
<tr>
<td>VFR: went shopping</td>
<td>66%</td>
<td>61%</td>
</tr>
<tr>
<td>Holiday: went shopping</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Business: went shopping</td>
<td>22%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Propensity to purchase selected items

<table>
<thead>
<tr>
<th>Item</th>
<th>None of these</th>
<th>Other holiday souvenir</th>
<th>Items for your home</th>
<th>Electrical or electronic items</th>
<th>CDs, DVDs, computer games</th>
<th>Food or drink</th>
<th>Games, toys or gifts for children</th>
<th>Books or stationery</th>
<th>Cosmetics or toiletries</th>
<th>Bags, purses</th>
<th>Personal accessories</th>
<th>Clothes or shoes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>32%</td>
<td>38%</td>
<td>9%</td>
<td>16%</td>
<td>3%</td>
<td>3%</td>
<td>17%</td>
<td>24%</td>
<td>9%</td>
<td>13%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>All markets</td>
<td>38%</td>
<td>32%</td>
<td>9%</td>
<td>16%</td>
<td>3%</td>
<td>3%</td>
<td>17%</td>
<td>24%</td>
<td>9%</td>
<td>13%</td>
<td>17%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)
2.1 Inbound activities

Propensity to participate in an English language course during a visit to the UK

<table>
<thead>
<tr>
<th>Country</th>
<th>Propensity to Participate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>3%</td>
</tr>
<tr>
<td>Norway</td>
<td>2%</td>
</tr>
<tr>
<td>Sweden</td>
<td>1%</td>
</tr>
<tr>
<td>Germany</td>
<td>1%</td>
</tr>
<tr>
<td>France</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2017 (literary, music, TV or film location) 2018. Did you go on any English language courses during this visit? Displayed as % of all visits to the UK from each country that included participation in an English language course.

Propensity to visit a literary, music, TV or film location

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Sweden</th>
<th>All Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: visited locations</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>All journey purposes:</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2017 (literary, music, TV or film location) 2018. Did you go on any English language courses during this visit? Displayed as % of all visits to the UK from each country that included participation in an English language course.
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain

- Very Welcome: 79% Sweden, 82% All market average
- Welcome: 18% Sweden, 15% All market average
- Neither: 2% Sweden, 2% All market average
- Unwelcome: 0% Sweden, 0% All market average
- Very Unwelcome: 0% Sweden, 0% All market average

Likelihood to recommend Britain

- Extremely likely: 84% Sweden, 82% All market average
- Likely: 13% Sweden, 15% All market average
- Neutral: 3% Sweden, 2% All market average
- Unlikely: 0% Sweden, 0% All market average
- Not likely at all: 0% Sweden, 0% All market average

Source: International Passenger Survey by ONS, 2017
2.3 Perceptions of the UK

The Swedish rate the UK highly with all ranks within the top 10, apart from scenic natural beauty for which the UK was rated 30th out of fifty nations in 2019. The UK is particularly well regarded for culture in general, contemporary culture, and vibrant cities.

Music, museums, films, sports and pop videos are the cultural products/services most strongly associated with the UK among the Swedes.

A trip to the UK would be expected to be ‘Exciting’ and ‘Educational’ by Swedish respondents.

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.

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.

Source: Anholt-Ipsos Nation Brands Index 2013, 2018 and 2019, Arkenford 2013

Areas of strength for the UK:
Vibrant cities, contemporary culture, and culture overall all within top 3!
### 2.3 Perceptions of the UK

**UK’s ranking (out of 50 nations)**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Swedish respondents</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Nation Brand</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Culture (overall)</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>The country has a rich cultural heritage</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>The country is an interesting and exciting place for contemporary culture such as music,</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>films, art and literature</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The country excels at sports</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>People (overall)</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>If I visited the country, the people would make me feel welcome</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>Tourism (overall)</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Would like to visit the country if money was no object</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>The country is rich in natural beauty</td>
<td>30</td>
<td>26</td>
</tr>
<tr>
<td>The country is rich in historic buildings and monuments</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>The country has a vibrant city life and urban attractions</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Anholt-Ipsos Nation Brands Index 2019
2.3 Perceptions of the UK

Cultural associations with the UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>Music</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>Films</td>
<td>39%</td>
<td>48%</td>
</tr>
<tr>
<td>Sports</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Modern Design</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Pop videos</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>Opera</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>Sculpture</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>None</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Street Carnival</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Circus</td>
<td>9%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Adjectives describing a potential trip to the UK

<table>
<thead>
<tr>
<th>Adjective</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Fascinating</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Exciting</td>
<td>31%</td>
<td>36%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Romantic</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>None</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Spiritual</td>
<td>2%</td>
<td>9%</td>
</tr>
<tr>
<td>Stressful</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Boring</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Risky</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Depressing</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Anholt-Ipsos Nation Brands Index 2019
### 2.3 Perceptions of the UK

Holiday wants and % saying destination is best place for...

<table>
<thead>
<tr>
<th>Importance</th>
<th>GB</th>
<th>FR</th>
<th>IT</th>
<th>AU</th>
<th>US</th>
<th>GE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.97 Have fun and laughter</td>
<td>16%</td>
<td>10%</td>
<td>19%</td>
<td>14%</td>
<td>22%</td>
<td>6%</td>
</tr>
<tr>
<td>5.76 Enjoy the beauty of the landscape</td>
<td>18%</td>
<td>30%</td>
<td>42%</td>
<td>42%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>5.75 Do something the children would really enjoy</td>
<td>18%</td>
<td>19%</td>
<td>17%</td>
<td>26%</td>
<td>42%</td>
<td>10%</td>
</tr>
<tr>
<td>5.74 Do what I want when I want spontaneously</td>
<td>17%</td>
<td>13%</td>
<td>19%</td>
<td>19%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>5.72 Enjoy peace &amp; quiet</td>
<td>8%</td>
<td>18%</td>
<td>22%</td>
<td>21%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>5.66 Enjoy local specialties (food and drink)</td>
<td>10%</td>
<td>47%</td>
<td>54%</td>
<td>11%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>5.61 Offers good value for money</td>
<td>19%</td>
<td>10%</td>
<td>13%</td>
<td>8%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>5.61 The people are friendly and welcoming</td>
<td>23%</td>
<td>13%</td>
<td>24%</td>
<td>35%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>5.60 Chill/ slow down to a different pace of life</td>
<td>9%</td>
<td>10%</td>
<td>21%</td>
<td>15%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>5.55 Experience things that are new to me</td>
<td>11%</td>
<td>7%</td>
<td>15%</td>
<td>39%</td>
<td>30%</td>
<td>3%</td>
</tr>
<tr>
<td>5.52 Explore the place</td>
<td>10%</td>
<td>16%</td>
<td>21%</td>
<td>19%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>5.45 Soak up the atmosphere</td>
<td>23%</td>
<td>24%</td>
<td>39%</td>
<td>25%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>5.44 Have dedicated time with my other half</td>
<td>27%</td>
<td>39%</td>
<td>46%</td>
<td>31%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>5.42 Broaden my mind/ Stimulate my thinking</td>
<td>15%</td>
<td>18%</td>
<td>27%</td>
<td>36%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>5.39 Get some sun</td>
<td>3%</td>
<td>18%</td>
<td>37%</td>
<td>56%</td>
<td>25%</td>
<td>2%</td>
</tr>
<tr>
<td>5.33 See world famous sites and places</td>
<td>29%</td>
<td>32%</td>
<td>43%</td>
<td>22%</td>
<td>35%</td>
<td>14%</td>
</tr>
<tr>
<td>5.30 Visit a place with a lot of history/historic sites</td>
<td>34%</td>
<td>37%</td>
<td>46%</td>
<td>12%</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>5.22 Enjoy high quality food and drink (gourmet food)</td>
<td>6%</td>
<td>62%</td>
<td>60%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>5.19 It offers unique holiday experiences</td>
<td>20%</td>
<td>22%</td>
<td>29%</td>
<td>54%</td>
<td>48%</td>
<td>14%</td>
</tr>
<tr>
<td>5.03 Experience activities/places with a wow factor</td>
<td>11%</td>
<td>18%</td>
<td>26%</td>
<td>57%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>4.91 Meet the locals</td>
<td>29%</td>
<td>8%</td>
<td>17%</td>
<td>22%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>4.85 Get off the beaten track</td>
<td>10%</td>
<td>9%</td>
<td>17%</td>
<td>33%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>4.80 Be physically healthier</td>
<td>10%</td>
<td>16%</td>
<td>18%</td>
<td>22%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>4.77 Provides a wide range of holiday experiences</td>
<td>23%</td>
<td>23%</td>
<td>29%</td>
<td>40%</td>
<td>49%</td>
<td>14%</td>
</tr>
<tr>
<td>4.71 A good place to visit at any time of year</td>
<td>16%</td>
<td>14%</td>
<td>19%</td>
<td>34%</td>
<td>36%</td>
<td>13%</td>
</tr>
<tr>
<td>4.69 Feel connected to nature</td>
<td>15%</td>
<td>14%</td>
<td>16%</td>
<td>48%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>4.63 Revisit places of nostalgic importance to me</td>
<td>23%</td>
<td>14%</td>
<td>19%</td>
<td>34%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>4.59 Easy to get around by public transport</td>
<td>33%</td>
<td>15%</td>
<td>12%</td>
<td>10%</td>
<td>21%</td>
<td>2%</td>
</tr>
<tr>
<td>4.42 Good shopping</td>
<td>42%</td>
<td>25%</td>
<td>29%</td>
<td>10%</td>
<td>53%</td>
<td>13%</td>
</tr>
<tr>
<td>4.37 Feel special or spoilt</td>
<td>13%</td>
<td>10%</td>
<td>23%</td>
<td>15%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>4.15 Visit places important to my family’s history</td>
<td>8%</td>
<td>13%</td>
<td>6%</td>
<td>9%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>3.82 Meet and have fun with other tourists</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>25%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>3.78 Do something environmentally sustainable/ green</td>
<td>12%</td>
<td>4%</td>
<td>8%</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>3.63 Experience adrenalin filled adventures</td>
<td>8%</td>
<td>20%</td>
<td>11%</td>
<td>43%</td>
<td>28%</td>
<td>8%</td>
</tr>
<tr>
<td>3.48 Party</td>
<td>16%</td>
<td>16%</td>
<td>21%</td>
<td>11%</td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>3.45 Do something useful like volunteering to help on a project</td>
<td>9%</td>
<td>10%</td>
<td>20%</td>
<td>19%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>3.43 To participate in an active pastime or sport</td>
<td>25%</td>
<td>22%</td>
<td>27%</td>
<td>31%</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>3.16 Go somewhere that provided lots of laid on entertainment/nightlife</td>
<td>27%</td>
<td>28%</td>
<td>28%</td>
<td>26%</td>
<td>52%</td>
<td>16%</td>
</tr>
<tr>
<td>3.10 Watch a sporting event</td>
<td>49%</td>
<td>13%</td>
<td>40%</td>
<td>12%</td>
<td>39%</td>
<td>19%</td>
</tr>
<tr>
<td>2.50 Fashionable destination</td>
<td>17%</td>
<td>16%</td>
<td>20%</td>
<td>28%</td>
<td>33%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
2.3 Perceptions of the UK

Motivations for choosing Britain as a holiday destination

- Cultural attractions
- Wide variety of places to visit
- Wanted to go somewhere new
- Vibrant cities
- Countryside/natural beauty
- Easy to get around
- Somewhere English-spoken
- Visiting friends or relatives
- Ease of getting to the country
- A culture different from own
- A mix of old and new
- Contemporary culture
- Try local food and drink
- A good deal
- Security / safety
- Accommodation (variety & quality)
- Easy to get plan/organise
- Meeting locals
- Wide range of holiday activities
- The climate / weather
- Cost of staying in the destination
- Watching sport
- Visit a film/TV location
- Easy to get around
- Easy to visit with children

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)
2.3 Perceptions of the UK

Sought-after Britain activities

- Visit Madame Tussauds: 42% Sweden, 70% All markets
- Enjoy a traditional afternoon tea: 50% Sweden, 70% All markets
- Drive through the countryside of England: 53% Sweden, 68% All markets
- Take a canal boat tour through the waterways of England: 53% Sweden, 67% All markets
- A food tour of one of London's best foodie markets: 52% Sweden, 65% All markets
- Ride the scenic 'Hogwarts Express' (Harry Potter train) through the Scottish...: 47% Sweden, 55% All markets
- Watch a musical in London's West End: 50% Sweden, 67% All markets
- Share stories over a pint with locals in a cosy rural pub: 42% Sweden, 50% All markets
- Spot wildlife in the Scottish Highlands: 42% Sweden, 50% All markets
- Stay the night in a fairy-tale castle: 47% Sweden, 55% All markets
- Explore Britain's history using a historic cities app to uncover the stories: 42% Sweden, 50% All markets
- Go hiking on the South West coast: 38% Sweden, 42% All markets
- Walk along Hadrian's wall in Northern England: 42% Sweden, 50% All markets
- Explore the Beatles Story in their home city of Liverpool: 47% Sweden, 55% All markets
- Hunt for The Loch Ness Monster with a boat cruise on Loch Ness: 35% Sweden, 50% All markets
- Visit locations from my favourite TV/film shows filmed on location in Britain: 32% Sweden, 50% All markets
- Watch a Premier League football match in a pub with locals: 32% Sweden, 50% All markets
- Relax in Bath spa's rooftop pool: 36% Sweden, 42% All markets
- A wine tour in the vineyards of England: 36% Sweden, 50% All markets
- Shop for quirky gifts in a seaside town: 41% Sweden, 50% All markets
- A food tour of one of London's best foodie markets: 36% Sweden, 65% All markets
- Drive through the countryside of England: 36% Sweden, 68% All markets
- Learn about Britain's history using a historic cities app to uncover the stories: 36% Sweden, 67% All markets
- Go hiking on the South West coast: 36% Sweden, 70% All markets
- Walk along Hadrian's wall in Northern England: 36% Sweden, 70% All markets
- Explore the Beatles Story in their home city of Liverpool: 36% Sweden, 70% All markets
- Hunt for The Loch Ness Monster with a boat cruise on Loch Ness: 35% Sweden, 70% All markets
- Visit locations from my favourite TV/film shows filmed on location in Britain: 32% Sweden, 70% All markets
- Watch a Premier League football match in a pub with locals: 32% Sweden, 70% All markets
- Relax in Bath spa's rooftop pool: 36% Sweden, 70% All markets
- A wine tour in the vineyards of England: 36% Sweden, 70% All markets
- Shop for quirky gifts in a seaside town: 41% Sweden, 70% All markets

Source: Anholt-Ipsos Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. Top 20 activities shown; for full list please see report at visitbritain.org/understanding-international-visitors
Chapter 3: Understanding the market
3.1 Structural drivers

Demographics & society

• 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 tends to have 30 days of annual leave.

Source: Oxford Economics, CIA World Factbook 2019
3.1 Structural drivers: general market overview

General market conditions

Sweden was the UK’s thirteenth largest source market in terms of visits and sixteenth most valuable in terms of visitor spending in 2018.

The Swedish economy has struggled with slow growth, a likely consequence of weak domestic and international demand. Oxford Economics’ forecast suggests a similar pace of growth in 2020 like in the previous years; however, risks remain to the downside. This would see real GDP growth of 1.2% in 2020.

Consumer confidence, albeit weak in the historical context, has started to stabilise.

The unemployment rate has increased in 2019 as a result of increased labour market participation rather than a reduction in employment. Sentiment indicates that job growth is likely to slow more. Household spending is, however, supported by rising house prices which create strong wealth effects.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2019 data)</th>
<th>Sweden</th>
<th>Eurozone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>10.3</td>
<td>338.9</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>51,246</td>
<td>44,005</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>2.5</td>
<td>1.4</td>
</tr>
<tr>
<td>Annual average GDP growth in 2019 (%)</td>
<td>1.2</td>
<td>1.2</td>
</tr>
</tbody>
</table>

Source: Oxford Economics

Economic indicators (%)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth</td>
<td>2.3</td>
<td>1.2</td>
<td>1.2</td>
<td>1.8</td>
</tr>
<tr>
<td>Real consumer spending growth</td>
<td>1.7</td>
<td>1.0</td>
<td>1.7</td>
<td>2.0</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>6.3</td>
<td>6.8</td>
<td>7.3</td>
<td>7.1</td>
</tr>
</tbody>
</table>
3.1 Structural drivers: demographic and social indicators

Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population (m)</td>
<td>10.3</td>
</tr>
<tr>
<td>Median age (2018 est.)</td>
<td>41 years old</td>
</tr>
<tr>
<td>Overall growth rate (2019-2023)</td>
<td>3.4%</td>
</tr>
</tbody>
</table>

Sweden has a population of more than 10 million with a median age of 41 years. The Swedish population is ageing, like in many other European societies. In terms of median age, Sweden ranks globally in 45th 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.

87% of Swedish people live in cities (World Bank est.). According to the Capgemini World Wealth Report 2019 there were 129,000 High Net Worth Individuals (HNWI)* resident in Sweden in 2018, down 3% on 2017. It is globally the 25th largest HNWI population.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2010</th>
<th>2020</th>
<th>2030</th>
<th>2040</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median age (in years)</td>
<td>40.7</td>
<td>41.1</td>
<td>42.2</td>
<td>43.9</td>
</tr>
</tbody>
</table>

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in SEK)

Please visit our website to find the most up-to-date exchange rate trend based on monthly averages.

Source. Bank of England
3.2 Consumer trends

Swedish outbound travel decreased in 2018 for the first time since the global financial crisis about a decade ago. The two most common factors quoted as to why are weak Swedish kronor and increased focus on air travel effects on climate change.

35% state the intent to further reduce their overseas travel. Swedish overseas travel is likely to have only grown slowly in 2019.

Interest in rail travel has consistently grown since 2018. Actual booking has only grown by 2-3%; however, during 2019, tour operators and rail search websites have been making booking easier for the customer, so we can expect to see a stronger pattern of growth.

The majority of Swedes book their holidays online and are familiar with e-commerce, especially the younger age groups.

Sources: Svenskarna och interenet 2019, Resebarometern 2019
3.2 Consumer trends: overall travel trends

Travel trends

Sustainability. In 2019 Swedes' travel habits have become part of the sustainability issue. Media and social media have had a greater focus on how journeys affect the climate; air travel in particular has been under scrutiny. Interest in rail travel has increased significantly. The question remains: how many Swedes really will replace flight with rail. 50% of Swedes surveyed believe that the barriers are long journey times and lack of vacation days.

A perfect holiday for most Swedes would include: some ‘own time’, some adventure and making sure most things are organised before you go. ‘Own time’ or time to yourself is a high priority among the things you do to avoid ‘holiday arguments’; new adventures to reduce the risk of boredom; and having most things arranged before departure, so you can make the most of your time in destination.

98% of the Swedish population has access to the Internet and 91% use it daily. It is more and more common to own a computer and a tablet as well as a smartphone. 54% use Internet of Things devices.

Less screen time on holiday & digital detox for some!

As many as 61% of Swedes would like a digital detox during the holidays. The figure is significantly higher in women than in men. In terms of age, the figure is highest among those between the ages of 35 and 55 and lowest among those who are the oldest. Thus, those between 56 and 79 years have significantly less need to disconnect. About two-thirds of Swedes believe they spend less time with their phone / tablet / laptop on holiday compared to everyday life. One fifth spends about the same amount of time, while only 5% use screens more on vacation than in everyday life.

The most common ‘types’ of Swedish travellers: 41% are "The organised" who like to have most things arranged before departure, made up of more women and Swedish millennials. 17% are the “Bon vivant”, with a great focus on food and drink, with more men than women and 35-55 age range. 14% are "The Cultural" who love historical sites, exhibitions and art; slightly more women than men and more common in older age ranges. Party-goers & Adventurers were a very small group and 21% didn’t identify with a group.

Source: RESIA BAROMETER 2019, Svenskarna och internet 2019
3.2 Consumer trends: motivation and attitudes to holidays

In 2017, Swedes made 42 million domestic leisure trips spending a total of SEK 135.6 billion, compared to 19 million overseas trips spending SEK 263.6 billion.* Only 10% of Swedes are not able to afford a holiday which is one of the lowest levels in Europe. 28% is the European average; only Norway and Switzerland rank stronger than Sweden*.

Age is of great importance for how common it is to go on vacation. Young women travel the most, while it is unusual to go on holiday trips among those over 84 years. 75 percent of women aged 16-24 travelled on vacation last year. Holiday travel decreases with age over 74 years. In the 75-84 year age group, the proportion of holidaymakers is still 30 percent among women. In the oldest age group, 85 years and older, only 8 percent travelled on vacation. This is a gradual decline from 15 percent in 2012*.
3.2 Consumer trends: reasons for holidays

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.

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?

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

Source: VisitBritain/IPSOS 2016
3.3 Booking and planning: booking channels and ticket sales

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>98%</td>
<td>85%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>By phone</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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%.

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>81%</td>
<td>70%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>By phone</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Did not book/stayed with friends/relatives</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>83%</td>
<td>64%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>9%</td>
<td>26%</td>
</tr>
<tr>
<td>By phone</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
3.3 Booking and planning: booking channels and ticket sales

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 (1/2)

**Decision lead-time for visiting Britain**

**Starting to think about trip**

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>39%</td>
<td>31%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Deciding on the destination**

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Looking at options/prices**

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Booking the trip**

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Sweden</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors
3.3 Booking and planning: lead-times (2/2)

Decision lead-time for visiting Britain: commentary (see tables on previous slide)

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.

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.

In 2019 the average Swede spent 5 hours and 6 minutes per day watching moving imagery, where 55% was online video, 43% linear TV and 2% other. 70% of Swedes spend on average 105 minutes per day listening to the radio.

Source: VisitBritain/IPSOS 2016, TV-året 2019 (MMS), Årsrapport om radiolyssnandet i Sverige 2019 (Kantar Sifo)
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) which make up about 35% of the Swedish television market. Main commercial TV channels: TV 4 (34% market share (2015)), TV3, Kanal 5, Sjuan, TV6 and TV8.
About 82% 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 56% 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.
On average, 61% 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 1h 40 minutes hours in 2019.

Newspapers
55% of adults in Sweden read at least one newspaper a day.
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.
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 Dagbladet, Dalarnas Tigningar, Nerikes Allehanda.
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, Nordicom-Sweden’s Media Barometer 2018
3.4 Reaching the consumer: magazines and online media

Magazines
There are more than 4500 periodicals in the Swedish market including many small titles. 28% of these are members magazines for private consumers, 25% are free consumer magazines, 20% are trade press, 17% are popular press where the most successful magazines are about home and gardening and 10% are organisational press where the most successful titles are about general business issues.

The readership of periodicals is stable: 36% of Swedes read some popular magazine/week while organisational press is read by around 10% 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 (83% currently), now 65% use it daily, higher than the average in Europe which is currently 56%.

Facebook, Instagram and Youtube are the most used networks. 74% of Swedes have a Facebook account. Twitter has decreased in use.

Print goes digital: Almost 8 out of 10 Swedes read newspapers only, 5 of 10 reads blogs and almost 3 of 10 reads e-books at least sometimes. Aftonbladet.se is the biggest news source in the Nordics with 3,554,000 readers per day.
3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- To keep in touch with people at home:
  - Sweden: 48%
  - All markets: 44%
- To post / upload photos of my holiday:
  - Sweden: 39%
  - All markets: 40%
- Look for recommendations for places to eat or drink:
  - Sweden: 29%
  - All markets: 30%
- I have not used social media at all on this type of holiday:
  - Sweden: 26%
  - All markets: 30%
- Share with others where you are / what you are doing while on holiday:
  - Sweden: 29%
  - All markets: 29%
- To let people know where I am at a given moment (e.g. checking in on Facebook):
  - Sweden: 25%
  - All markets: 29%
- To help you plan / decide where to go or what to see or what to do:
  - Sweden: 23%
  - All markets: 27%
- Ask for advice on where to go or what to do:
  - Sweden: 20%
  - All markets: 26%
- Share my own advice or recommendations about visiting where I am:
  - Sweden: 19%
  - All markets: 23%

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)?
3.4 Reaching the consumer: influences

Influences on destination choice

Talking to friends / relatives / colleagues
Information from search engines [e.g. Google]
Looking at prices of holidays/flights on price comparison websites
Websites providing traveller reviews of destinations [e.g. Trip Advisor]
Talking to friends or family in your social network (e.g. via Facebook / Twitter)
An accommodation provider/ hotel website
A travel guidebook
Travel agent or tour operator website
Travel blogs / forums
Travel programme on TV
A special offer or price deal you saw advertised online
Travel agent or tour operator brochure
An official tourist organisation website or social media site for the country or destination
An official tourist brochure for the country / city / region
A travel feature / article in a magazine or newspaper
Direct advice from a travel agent/tour operator (face-to-face, over the phone)
Images or videos your friends or family have posted to social media
Images / information in online adverts
A special offer or price deal you saw advertised offline e.g. in a newspaper, magazine or on TV
Images or videos from a photo/video sharing social network site
Travel app
Images / information in adverts in a magazine or newspaper
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel
Images / information in TV adverts
Seeing social media posts from celebrities talking about their holiday destinations
Images / information on billboards / poster adverts
Travel programme on radio
Information in radio adverts

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

- **All markets**
  - Have visited, film/TV main reason: 6%
  - Have visited, film/TV some influence: 7%
  - Have visited, film/TV no influence: 9%
  - Not visited, but interested. Film/TV main reason: 35%
  - Not visited but interested. Film/TV some influence: 6%
  - Not visited but interested. Film/TV no influence: 16%
  - Not visited and not interested: 22%

- **Sweden**
  - Have visited, film/TV main reason: 3%
  - Have visited, film/TV some influence: 3%
  - Have visited, film/TV no influence: 4%
  - Not visited, but interested. Film/TV main reason: 25%
  - Not visited but interested. Film/TV some influence: 8%
  - Not visited but interested. Film/TV no influence: 24%
  - Not visited and not interested: 33%

Source: 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?
Chapter 4:
Access and travel trade
4.1 Access: key facts

97% 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 and peaked in 2018, but eased in the latest year to almost 1.7m airplane seats in 2019.

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, Norwegian and Ryanair 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 across the sea (just over 17,000) or via the Channel Tunnel (about 9,000 visits) in 2018.

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

Access to Britain

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly aircraft departures</td>
<td>188</td>
</tr>
<tr>
<td>Weekly aircraft seat capacity</td>
<td>32,340</td>
</tr>
<tr>
<td>Airports with direct routes in Sweden</td>
<td>5</td>
</tr>
<tr>
<td>Airports with direct routes in Britain</td>
<td>9</td>
</tr>
</tbody>
</table>

*Data in this table excludes routes from Salen which account for a very small share of annual capacity.

Source: International Passenger Survey by ONS, Apex 2019, non-stop flights only
4.1 Access: mode of transport

Visits by mode of transport

Sea and tunnel travel (000s) in 2018

Annual share by mode (2018)

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends

Airline seat capacity by carrier (2019)

Source: Apex, non-stop flights only.
4.1 Access: capacity

Destination airport annual seat capacity

- London - Heathrow (47%)
- London - Gatwick (22%)
- London - Stansted (15%)
- Edinburgh (8%)
- Manchester International (6%)
- Other* (2%)

Origin airport annual seat capacity

- Stockholm - Arlanda (65%)
- Gothenburg - Landvetter (24%)
- Stockholm - Skavsta (8%)
- Stockholm - Vasteras/Hasslo (2%)
- Other* (1%)

Destinations with less than 2% annual seat share grouped in 'Other': Bristol, London Luton, Cambridge, Birmingham International

Origin Airports with less than 2% annual seat share grouped in 'Other': Ostersund and Salen

Source: Apex 2019: 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: 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
4.2 Travel trade: Swedish tour operators

Selected operators in Sweden in 2018/09

<table>
<thead>
<tr>
<th>Selected operators which feature the UK as a destination</th>
<th>Turnover SEK (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUI Sverige AB</td>
<td>12,105,131</td>
</tr>
<tr>
<td>DER Touristik Nordic AB/Apollo Resor</td>
<td>6,577,150</td>
</tr>
<tr>
<td>Resia Travel Group AB</td>
<td>729,091</td>
</tr>
<tr>
<td>AC Airtours City Weekend AB</td>
<td>685,273</td>
</tr>
<tr>
<td>Nya Airtours City Breaks of Sweden AB</td>
<td>685,273</td>
</tr>
<tr>
<td>Unlimited Travel Group UTG AB</td>
<td>667,043</td>
</tr>
<tr>
<td>Ticket Leisure Travel Group AB</td>
<td>562,613</td>
</tr>
<tr>
<td>Rolfs Flyg &amp; Bussresor AB</td>
<td>447,708</td>
</tr>
<tr>
<td>Jambo Tours Scandinavia AB</td>
<td>292,460</td>
</tr>
</tbody>
</table>

Top intermediaries in the Nordics

<table>
<thead>
<tr>
<th>Top intermediaries in the Nordic region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albatros Travel</td>
</tr>
<tr>
<td>Jörns Resor</td>
</tr>
<tr>
<td>KulturRejser Europe</td>
</tr>
<tr>
<td>Rolfs Flyg och Buss</td>
</tr>
<tr>
<td>Scandorama / Ölvemarks Holidays</td>
</tr>
<tr>
<td>Tema Resor</td>
</tr>
<tr>
<td>RK Travel (mainly SE/NO)</td>
</tr>
</tbody>
</table>

Source: [Largest companies.net](https://www.largestcompanies.net), VisitBritain
4.2 Travel trade: Swedish holidays

Public holidays

National public holidays in 2020

<table>
<thead>
<tr>
<th>Date</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>New Year’s Day</td>
</tr>
<tr>
<td>6 January</td>
<td>Epiphany</td>
</tr>
<tr>
<td>10 April</td>
<td>Good Friday</td>
</tr>
<tr>
<td>12 April</td>
<td>Easter Sunday</td>
</tr>
<tr>
<td>13 April</td>
<td>Easter Monday</td>
</tr>
<tr>
<td>1 May</td>
<td>Labour Day</td>
</tr>
<tr>
<td>21 May</td>
<td>Ascension Day</td>
</tr>
<tr>
<td>31 May</td>
<td>Whit Sunday</td>
</tr>
<tr>
<td>6 June</td>
<td>National Day</td>
</tr>
<tr>
<td>20 June</td>
<td>Midsummer Day</td>
</tr>
<tr>
<td>31 October</td>
<td>All Saints Day</td>
</tr>
<tr>
<td>25 December</td>
<td>Christmas Day</td>
</tr>
<tr>
<td>26 December</td>
<td>Second Day of Christmas</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Local/School Holiday</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 7</td>
<td>Sportlov</td>
<td>Gothenburg</td>
</tr>
<tr>
<td>Week 8</td>
<td>Sportlov</td>
<td>Malmö</td>
</tr>
<tr>
<td>Week 9</td>
<td>Sportlov</td>
<td>Stockholm</td>
</tr>
<tr>
<td>Week 44</td>
<td>Oktoberlov</td>
<td></td>
</tr>
</tbody>
</table>

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

Caring for the Consumer:

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
Appendix

Useful links and further information
Appendix 1: 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 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).
Appendix 1: Working with VisitBritain

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 ‘**I Travel For…’** marketing campaign.

• **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**.

To find out more information, browse:

**VisitBritain’s mission**
**The Government’s Tourism Action Plan**
**VisitBritain’s events**
‘**I Travel For…’ campaign**
**The tourism sector deal**
Appendix 1: Working with VisitBritain

VisitBritain’s global audience segments

In 2017-2019, VisitBritain 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 Understanding our consumers.

In Sweden, VisitBritain focuses on two audience segments among the international travellers:

- **Buzzseekers in Sweden**: Often singles, pre-family couples and you professionals. Youthful and adventurous mind set. Active, look for new experiences and enjoy vibrant city life.

- **Explorers in Sweden**: Mainly singles, couples and empty nesters who are flexible travellers looking to unwind at relaxed pace. Mature and open-minded with high interest in culture, arts and history. Enjoy variety of holidays from seaside, lakes & mountains to spa & wellness to city breaks and themed group travel.

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

Source: VisitBritain/Kubi Kalloo, 2017-2019
Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 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 pages or our inbound research & insights or contact us directly (Email: research@visitbritain.org)
Appendix 2: Useful research resources

We have dedicated market-specific research and insights available which include:

- **Perceptions of Britain overseas**
- **Planning, decision-making and booking cycle of international leisure visitors to Britain on understanding international visitors**
- **Gateways in England, insights on overseas visitors to England’s regions, participation in leisure activities, multi-destination trips and more on visitor characteristics and behaviour**
- **Food & drink research**

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 pages](#) or our [inbound research & insights](#) or contact us directly (Email: research@visitbritain.org)
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

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. You can find out more and consult the release calendar, on our [IPS webpage](#).

• **Oxford Economics** last updated the ‘Global Travel Service’ databank on 8th November 2019, other information on Sweden and the Eurozone on 20 January 2020.

• **Apex** was last updated with December 2019 data.

• **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, January 2020.

• **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 **Anholt-Ipsos Nation Brands Index** (NBI), was carried out online in July 2019 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.
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Useful definitions and abbreviations

• **VFR** means Visiting Friends and/or Relatives.
• **Misc** 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 USD1 million.

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 2018. 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.