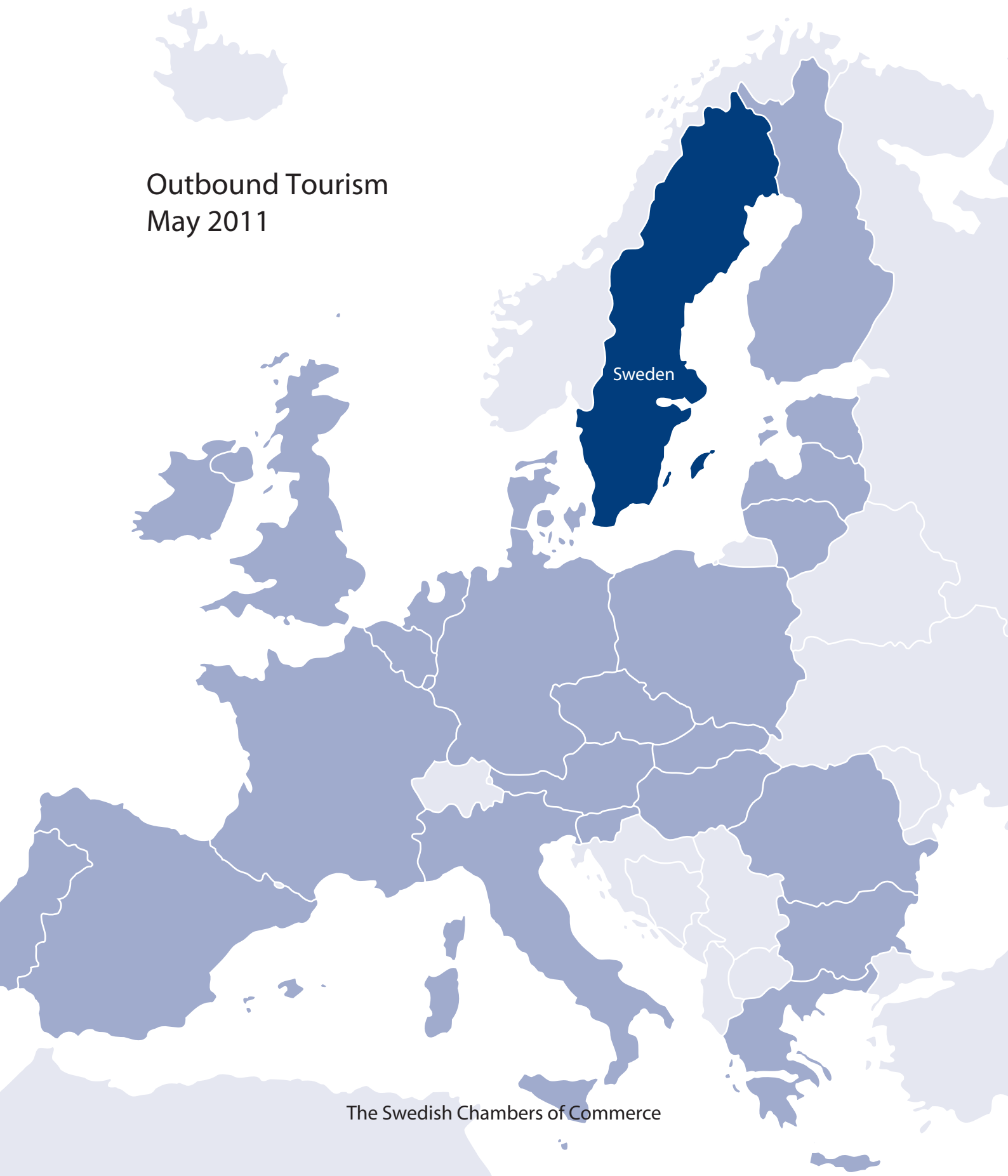


Market Report

Focus on the EU and Swedish Market

Outbound Tourism
May 2011



Disclaimer

The information provided in this market report is believed to be accurate at the time of publishing. It is, however, passed on to the reader without any responsibility on the part of the authors and it does not release the reader from the obligation to comply with all applicable legislation.

The authors or publishers made no warranty, expressed or implied, concerning the accuracy of the information presented, and will not be liable to injury claims pertaining to the use of this publication or the information contained therein.

No obligation is assumed for updating or amending this publication for any reasons, be it new or contrary information or changes in legislation, regulations or jurisdiction.



This document has been financed by the Swedish International Development Cooperation Agency, Sida. Sida does not necessarily share the views expressed in this material. Responsibility for its contents rests entirely with the author.

Summary

This market brief will provide an in-depth analysis of the Swedish market for outbound tourism. There will be a special focus on adventure, cruise, cultural, eco/sustainable and sun and beach tourism. Furthermore, the position of Sweden within the EU outbound tourism market will be discussed. The objective is to support tourism providers and inbound tour operators in developing countries in understanding the Swedish outbound tourism market and, consequently, improving their position on that market. The market brief is also very useful for Business Support Organisations in developing countries seeking to support their local tourism industry.

EU outbound tourism market

Outbound trips by EU citizens to developing countries represented 18% of the total number of EU outbound trips. However, outbound trips to developing countries increased by 16% between 2005 and 2008, whereas the total number of outbound trips increased by only 8% in the same period. Developing countries in Europe were the most popular, followed by developing countries in Africa, East Asia/Pacific, the Middle East, Latin America and South Asia. Germany had the largest market share in terms of EU outbound trips to developing countries, followed by the UK and France. Sweden ranked ninth.

Swedish outbound tourism market

Swedish outbound trips to developing countries represented around 18% of the total number of Swedish outbound trips in 2008. However, between 2005 and 2008 Swedish outbound trips to developing countries increased almost twice as much as the total number of outbound trips. Developing countries in East Asia/Pacific were the most popular among Swedes, followed by developing countries in Europe, the Middle East and Africa. Turkey and Thailand were the most popular developing country destinations, followed by Egypt, China, Croatia, India, Tunisia and Malaysia.

Although the total number of Swedish outbound trips decreased in 2009 as a result of the recession, signs of recovery were noticeable during 2010 and predictions for 2011 are very positive. Price is the most important factor that influences the choice of a holiday destination for Swedes, followed by weather, nature, food, culture and safety at a destination.

Trends

The most important trends on the Swedish outbound tourism market are recovering demand for outbound tourism, an increasing older age group, search for authentic experiences, shorter

trips, increased demand for niche holidays, all-inclusive holidays, combination trips, city trips and green and fair trips, having a Swedish speaking guide and increased use of the Internet.

Trade structure

The Swedish tour operating market is dominated by three major charter tour operators: Ving Sverige, Fritidsresor and Apollo Resor. The rest of the market consists of a lot of smaller-scaled, general tour operators and niche tour operators. Most bookings from the Swedish tourism market take place through an inbound tour operator. Tourism providers in developing countries are therefore advised to target inbound tour operators. Inbound tour operators in developing countries are advised to target Swedish niche tour operators as they offer specialised and often tailor-made tourism products and are therefore more dependent on local partners than major tour operators.

Besides inbound and outbound tour operators and the Internet, travel agencies can also be an important trade channel for tourism products in Sweden, as an increasing number of Swedish travel agencies have taken over the role of tour operator and work directly with tourism companies in developing countries.

Prices

The prices of holiday packages in Sweden have been relatively stable during the last five years. Currency fluctuations influence demand for outbound tourism by Swedes. A strong Swedish Crown is currently stimulating demand for outbound tourism.

Market access requirements

There are some non-legal requirements such as standards and certifications that could help tourism companies in developing countries to distinguish themselves from competitors and to increase their credibility. The most important ones are a quality management system, ISO 26000 and Travelife.

Finding potential Swedish trade partners

The most important sources for tourism companies in developing countries to find potential trade partners in Sweden are the travel event TUR, the Association of Swedish Travel Agents and Tour Operators, tourism promotion organisations in their own country, the Internet, travel magazines and familiarisation trips. The most important travel event in Sweden is TUR. It is advisable to exhibit at this event and to make pre-appointments with other exhibitors.

Internet

Sweden has the highest Internet penetration rate in the EU. Having a professional, high quality website is therefore very important for tourism companies in developing countries seeking to target the Swedish market, not only to increase their credibility and professional image, but also to increase the chance of being found by Swedish tour operators and travel agencies and increase their exposure among Swedish travellers. Social media also plays an increasingly important role in the destination selection process of both Swedish tour operators and consumers. Facebook is the most important social network in Sweden. Other important social media platforms are Reseguiden, Travelforum, TripAdvisor and YouTube.

Swedish niche outbound tourism markets

According to industry experts, adventure tourism, cruise tourism, cultural tourism, eco/sustainable tourism and sun and beach tourism are important niche market trends in Sweden.

Adventure tourism

Adventure tourism is one of the fastest growing tourism segments in Sweden. Nowadays, Swedish travellers are looking for more adventurous, active holidays that provide them with new, unique experiences. In actual fact, Swedes are quite active people in their daily life. Walking, hiking and cycling are popular activities in particular. Around 10% of Swedes are interested in adventurous holidays and 9% in active holidays that include activities such as hiking, cycling and horseback riding.

Cruise tourism

The Scandinavian countries together ranked sixth in terms of total European cruise passengers and showed the highest growth in cruise passengers between 2005 and 2010. Swedes are becoming increasingly interested in cruising. The Mediterranean/Atlantic Islands is the most popular cruise destination for Swedes, followed by cruises to the Caribbean or other regions outside Europe. Important elements that cruise line operators take into consideration when selecting a destination are revenue potential, attractiveness, safety, access, local infrastructure and local service. Theme cruises, fly & cruise and lower prices for cruise holidays are important trends in the Swedish cruise tourism market.

Cultural tourism

Demand for outbound cultural trips by Swedes is increasing, as Swedes are increasingly interested in discovering new cultures and activities and like to explore unknown regions. Meeting local people and cultural city breaks are important trends.

Eco/sustainable tourism

Interest in eco/sustainable tourism is increasing in Sweden. When going on a holiday, more and more Swedes attach importance to the impact of their travel on nature and local people. They want to conserve the environment as much as possible and improve the well-being of local people. Many Swedish tour operators have also implemented eco/sustainable measures in their operating guidelines and have set up sustainable travel programs.

Sun and beach tourism

Sun and beach tourism is the most important outbound tourism segment in Sweden and offers great potential for tourism companies in warm and sunny developing countries. More than 73% of Swedes are interested in a sun and beach holiday and 21% are interested in combination holidays that combine sunbathing with activities. An important trend in the Swedish outbound sun and beach tourism market is 'experiencing'. Swedish travellers still want to sunbathe or swim during their holiday, but they want to combine it with other activities like meeting local people, hiking, a safari, a cultural tour, meditation, or a visit to a big city.

BSOs

Business Support Organisations (BSOs) in developing countries can support local tourism companies by promoting their destination among Swedish tour operators, travel agencies and consumers (for example, by developing a destination marketing campaign), by organising trainings for local tourism companies, by forming consortia and by lobbying with governments.



List of Contents

Chapter	Page
Introduction	4
1 EU outbound tourism	6
1.1 EU outbound tourism	5
1.2 Trends	8
2 Swedish outbound tourism market	10
2.1 Swedish outbound tourism	10
2.2 Swedish traveller profile	13
2.3 Trends	15
2.4 Trade structure	16
2.5 Prices	18
2.6 Market access requirements	19
3 Finding potential Swedish trade partners	20
3.1 Travel events	20
3.2 Travel trade associations	21
3.3 National tourism boards / Tourism promotion organisations	21
3.4 Internet	21
3.5 Travel magazines and television programmes	22
3.6 Familiarisation trips	23
3.7 Approaching potential Swedish partners	23
4 Swedish niche outbound tourism markets	24
4.1 Adventure tourism	24
4.2 Cruise tourism	26
4.3 Cultural tourism	28
4.4 ECO / Sustainable tourism	30
4.5 Sun and beach tourism	31
5 Recommendations for BSOs in developing countries	33

Compiled by Facts, Figures and Future bv, The Netherlands

© Sida May 2011

Issued by: Swedish Chambers of Commerce / Trade Promotion Programme

Introduction

Content

This market brief will provide an in-depth analysis of the Swedish market for outbound tourism. There will be a special focus on the following niche markets: adventure tourism, cruise tourism, cultural tourism, eco/sustainable tourism and sun and beach tourism. Furthermore, the position of Sweden within the EU outbound tourism market will be discussed.

Objective

This market brief aims to support tourism providers and inbound tour operators in developing countries in understanding the Swedish outbound tourism market and, consequently, improving their position on that market. The market brief is also very useful for Business Support Organisations (BSOs) in developing countries that want to support their local tourism industry. A list of the developing countries that are included in the Swedish Chambers' trade promotion programme can be found on the website of the Swedish Chambers (<http://www.swedishchambers.se>).

Statistical product classification

Unlike physical goods, services such as tourism cannot be divided into statistical codes. However, there are other ways of measuring tourism market sizes and methods vary per source. Of all the different sources, the World Tourism Organisation (WTO - <http://www.unwto.org>) is the most well known and highly regarded. Moreover, WTO provides data on global tourism markets and enables the comparison of different tourism markets in an appropriate way. Therefore, WTO has been used as the primary source for statistics in this market brief. The WTO statistics used in this report are based on arrivals in the destination country. As collecting data on tourism is a time consuming process for WTO, the most recent and complete data available are from 2008. However, the figures still give a good indication of the main source markets and the main destination countries in the tourism industry.

Definitions

The definition of tourism can be interpreted very broadly. For this market brief, the WTO definition has been used:

'Tourism are the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited'.

Tourism can take place on a national or international level and includes both same-day visitors and overnight visitors. Inbound tourism is tourism of non-residents within the economic

territory of the country of reference. Outbound tourism refers to tourism of residents outside the economic territory of the country of reference. When talking about long haul tourism, travel that requires more than five hours flying time from the home country to a destination is meant.

This market brief focuses on the EU and Swedish market for outbound tourism, especially long haul. Besides Swedish outbound tourism in general, there will be a focus on adventure tourism, cruise tourism, cultural tourism, eco/sustainable tourism and sun and beach tourism. These niche markets have been selected because they have been identified by experts as promising markets for tourism companies in developing countries.

Adventure tourism

To define the term adventure tourism used in this market brief, the definition of Xola Consulting Services (<http://www.xolaconsulting.com>) has been used. Adventure tourism is 'a trip that includes at least two of the following three aspects: physical activity, interaction with the environment and cultural exchange'. Adventure tourism often includes activities such as backpacking, trekking, hiking, cycling, diving, horseback riding, rafting and canoeing.

Cruise tourism

Cruise tourism is 'the use of ships for pleasure cruising and not merely for transportation' (WTO). A cruise can be one-way or a round-trip with several ports of call. Sometimes travellers fly to a specific destination and take a cruise trip from there, the so-called 'fly & cruise'. A distinction can be made between river cruises and open water (sea/ocean) cruises. This market brief mainly focuses on open water cruises.

Cultural tourism

Cultural tourism refers to 'the movement of persons away from their normal place of residence with the intention to explore cultural heritage or other regions/countries' (Richards, G. 1996, Cultural tourism in Europe, CABI, Wallingford). Cultural tourism is a broad term and includes a lot of activities such as visiting art centres, museums, festivals, local communities, historic sites and monuments.

Eco/sustainable tourism

The definition of the International Ecotourism Society (TIES - <http://www.ecotourism.org>) has been used to define the term eco/sustainable tourism used in this market brief: 'responsible travel to natural areas that conserves the environment and improves the well-being of local people.' Important principles of eco/sustainable tourism are minimizing impact, building environmental and cultural awareness and respect

and providing financial benefits for conservation and local people.

Sun and beach tourism

The term sun and beach tourism used in this market brief refers to 'holidays whose primary purpose is to enjoy the beach and/or a sunny climate'.

European Union

The European Union (EU) is an economic and political union of 27 member states in Europe, consisting of: Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom. When referring to the EU, the EU27 is meant.

Methodology

This research has been conducted by combining desk research and primary research. A list of the most interesting sources that have been used for desk research can be found at the end of each chapter. The most important primary sources that have been used are:

- Interviews with two Swedish tourism industry experts: Mr. Curt Landin and Mr. Jan Wigsten.
- Interview with SRF, the Association of Swedish Travel Agencies and Tour Operators.
- Interview with Tillväxtverket, the Swedish Agency for Economic and Regional Growth.

- Interview with Scandinavian Airlines (SAS).
- Interviews with more than 12 niche tour operators or travel agencies in Sweden.
- Interviews with 2 inbound tour operators from developing countries.
- Interviews with 2 tourism promotion organisations.
- TUR March 2011, the leading Scandinavian trade fair for travel.
- Participation in the TUR seminar 'Fair Travel, Sustainability and CSR in the travel industry'.

Report structure

In Chapter 1, information about the EU outbound tourism market will be provided. Chapter 2 will zoom in on the Swedish market for outbound tourism in general, in which Swedish outbound tourism statistics, the Swedish traveller profile, trends, trade structure, prices and market access requirements will be discussed. Chapter 3 will give information about how to find potential Swedish partners. Important niche outbound tourism markets in Sweden will be the topic of Chapter 4, including adventure tourism, cruise tourism, cultural tourism, eco/sustainable tourism, and sun and beach tourism. Finally, Chapter 5 will provide some recommendations for Business Support Organisations in developing countries. At the end of each chapter an overview of useful sources for further research can be found.



1 EU outbound tourism

This chapter will provide information about the EU outbound tourism market and the position of Sweden within that market. In order to get a clear idea of the main EU source markets in terms of outbound tourism, the chapter starts with an overview of outbound tourism statistics of EU countries. Next, the most important trends will be discussed. At the end of the chapter a list will be provided with useful sources for further research.

1.1 EU outbound tourism

EU outbound tourism to developing countries

Outbound trips by EU citizens to developing countries increased by 16% between 2005 and 2008, which was twice as much as total EU outbound tourism growth (8%). Outbound trips by EU citizens to developing countries represented more than 63

million trips in 2008. This was almost 18% of the total number of EU outbound trips. Developing countries in Europe were most popular, with more than 38% market share, followed by developing countries in:

- Africa (19%),
- East Asia/Pacific (15%),
- Middle East (13%),
- Latin America (11%),
- Asia (4.4%).

Although developing countries in Europe represented the largest market share in outbound trips to developing countries, outbound trips to developing countries in regions other than Europe increased much faster (11% and 19% respectively). Table 1.1 gives an overview of outbound trips to developing countries per region for the 15 most important EU countries in 2008.

Table 1.1 Outbound trips to developing countries per region, 15 most important EU countries, 2008, x thousand, growth 2005-2008 in %

	Africa	Latin America	East Asia / Pacific	Europe	Middle East	South Asia	Total	Growth 2005 - 2008
EU27	12,116	6,935	9,292	24,468	7,987	2,790	63,588	16%
Germany	1,395	942	1,672	6,090	1,475	346	11,919	6.7%
UK	1,662	1,600	2,299	2,438	1,707	1,293	10,999	16%
France	4,343	913	1,447	1,383	873	300	9,260	13%
Italy	1,088	803	506	1,821	1,212	211	5,641	12%
Netherlands	465	347	723	1,449	421	112	3,517	9.7%
Spain	862	1,071	296	439	227	90	2,984	21%
Austria	152	89	196	1,396	250	48	2,132	13%
Poland	289	75	117	877	626	36	2,020	123%
Sweden	189	131	685	563	255	72	1,896	28%
Belgium	467	150	228	712	246	51	1,853	21%
Bulgaria	41	5	28	1,333	23	4	1,433	-17%
Slovenia	5	5	7	1,189	69	3	1,279	25%
Czech republic	138	39	51	828	6	17	1,079	14%
Denmark	128	82	331	365	110	48	1,065	11%
Estonia	48	150	2	668	92	27	988	42%

Source: World Tourism Organisation (2011)

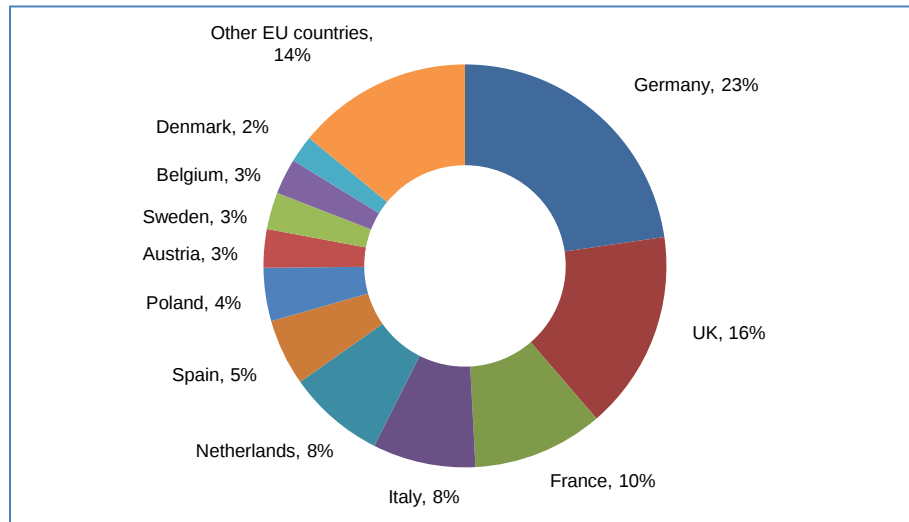
Germany, the UK and France had the largest number of outbound trips to developing countries. Sweden ranked ninth in the EU in terms of outbound trips to developing countries, behind Austria and Poland, but ahead of Belgium and Bulgaria. Recently joined EU member states like the Baltic States, Poland, Romania and Slovakia showed the highest growth rates between 2005 and 2008. However, most outbound trips by these countries were to developing countries in Europe and not to long haul developing countries. In general, it can be concluded that EU outbound trips to developing countries is growing much faster than EU outbound trips worldwide.

EU outbound tourism worldwide

The total number of outbound trips by EU citizens increased by 8% between 2005 and 2008 and represented more than 354 million trips in 2008. Europe, with a market share of 81%, was the most popular destination region, followed by Latin America (6.0%), East Asia/Pacific (5.0%), Africa (3.6%), the Middle East (3.3%) and South Asia (1.2%).

Figure 1.1 gives an overview of the market shares in terms of the total number of EU outbound trips for EU countries in 2008.

Figure 1.1 Market share in EU outbound trips, EU countries, 2008, in %



Source: World Tourism Organisation (2011)

Germany had the highest number of worldwide outbound trips with more than 80.4 million trips in 2008. Germany was followed by the UK and France (56.5 and 37.1 million outbound trips respectively). These three countries together represented almost half of the total number of outbound trips by EU citizens. Sweden, with a market share of 3%, is the ninth largest market in the EU in terms of total outbound tourism.

Outbound trips per capita

Although some countries are small in terms of population, this does not mean that they could not be interesting. Table 1.2 gives an overview of the average number of outbound trips per capita to developing countries and worldwide for EU countries.

Table 1.2 Average number of outbound trips per capita, EU countries, 2008

EU country	Developing countries	Worldwide
EU average	0.13	0.71
Estonia	0.74	0.88
Slovenia	0.64	0.93
Cyprus	0.30	1.23
Austria	0.26	1.31
Netherlands	0.21	1.69
Sweden	0.21	1.14
Denmark	0.19	1.41
Bulgaria	0.19	0.32
UK	0.18	0.92
Belgium	0.17	0.95
Germany	0.14	0.98
France	0.14	0.58
Finland	0.13	1.00

Source: World Tourism Organisation (2011) and Eurostat (2011)

EU country	Developing countries	Worldwide
Ireland	0.12	1.59
Luxembourg	0.10	1.63
Czech Republic	0.10	0.47
Slovakia	0.09	0.55
Italy	0.09	0.49
Portugal	0.08	0.48
Hungary	0.08	0.46
Greece	0.08	0.33
Spain	0.07	0.42
Malta	0.05	0.63
Lithuania	0.05	0.41
Poland	0.05	0.40
Latvia	0.04	0.41
Romania	0.04	0.30

When looking at outbound trips to developing countries, Estonia led in 2008. Slovenia, Cyprus, Austria, the Netherlands and Sweden followed. The average number of outbound trips per capita to developing countries is largely influenced by geographical closeness to some developing countries (for example, Slovenia to Croatia). When looking at outbound trips worldwide, citizens from the Netherlands, Luxembourg and Ireland travelled

abroad most per capita. Although these countries are among the smaller countries of the EU, the number of outbound trips per capita is high.

Package travel

Traditional package travel (pre-packaged travel deals that contain several elements such as transport, accommodation and excursions) is still

popular among EU citizens. It was estimated that in 2008 traditional travel package accounted for 40% of the total travel market, while dynamic packages (packages that have been put together by travellers themselves) represented 33% of the market. Other travel arrangements made up for the rest. Nowadays, more than half of EU citizens organise their holidays themselves, rather than purchase traditional travel packages. They prefer to put together their own packages where they can choose, for example, a flight with travel times that suit them, accommodation that meets their requirements and participate in excursions which they are really interested in.

International tourism expenditure

Germany was the biggest spender in the EU in terms of international tourism expenditure, amounting to €59.6 billion in 2009. Sweden ranked eighth. Table 1.3 provides an overview of international tourism expenditure in 2008 and 2009 by the ten most important EU countries. Furthermore, it also gives an indication of growth of tourism expenditure in % in the first three quarters of 2010 compared to the same quarters in 2009.

Table 1.3 International tourism expenditure, most important EU countries, 2008 and 2009, in € billion*, changes in %

EU country	2008 € billion	2009 € billion	Change in % 2008-2009	2010, Q1, change in % compared to Q1 2009	2010, Q2, change in % compared to Q2 2009	2010, Q3, change in % compared to Q3 2009
Germany	66.7	59.6	-11	0.5	1.3	3.0
UK	50.2	36.7	-27	-10	-0.8	-0.1
France	30.4	28.2	-7.0	3.9	3.1	8.1
Italy	22.6	20.5	-9.4	-5.8	6.9	4.2
Netherlands	15.9	15.2	-4.6	4.1	-6.8	1.5
Belgium	14.4	13.1	-9.1	10	-1.0	-1.5
Spain	14.9	12.4	-17	2.0	4.2	6.5
Sweden	10.8	8.7	-19	6.6	-3.2	7.7
Austria	8.4	7.9	-5.3	-3.2	-8.3	6.1
Denmark	7.1	6.5	-8.2	2.7	2.7	5.4

* Used exchange rate is 1 US \$ = € 0.7339

Source: World Tourism Organisation (2011)

As can be seen, international tourism expenditure by all listed EU countries decreased between 2008 and 2009. This was the result of the economic recession. However, international tourism expenditure started to recover again in 2010. In the third quarter of 2010, only the UK and Belgium showed a negative growth compared to the same period in 2009. Please note that the original results were in US dollars and were therefore influenced by the exchange rate between the Euro and the US dollar.

1.2 Trends

The tourism industry is, like all other industries, influenced by trends. The most important trends on the EU outbound tourism market are mentioned below.

Recovering tourism demand

The tourism industry was hit hard by the worldwide recession. However, demand for outbound tourism started to recover again in 2010 and the European outbound tourism market was estimated to have grown by 1-2% in 2010. Whereas long haul travel is growing well (an estimated 5%), short haul travel is stagnating. European travellers are still very careful with their travel budgets. In general, they are taking shorter trips and are spending less during their holidays. In 2010, the average length of a holiday decreased by 7% to 8 nights; average spending decreased by 4% to €874.

According to the European Travel Monitor Survey, there are differences in the development of outbound tourism in EU countries. While the UK outbound tourism market decreased by 6% in 2010, the Belgian and German outbound tourism markets stagnated. France, Spain and Italy showed moderate growth between 2-4%, whereas the Nordic markets showed the strongest growth at 5-8%.

Increased use of the Internet

There were an estimated 319 million Internet users in the EU in 2010, representing about 65% of the EU population. This was an increase of 239% compared to 2000. Internet penetration was highest in Sweden (92.5%), the Netherlands (88.6%), Denmark (86.1%), Finland (85.3%), Luxembourg (85.3%), the UK (82.5%) and Germany (79.1%). The increasing use of the Internet runs hand in hand with an increased use of the Internet for travel purposes such as information gathering, planning and booking.

Demographic changes

There is a growing older age group in Europe, the so-called 'baby boomers' (people born between 1946 and 1964) who have just reached retirement age or will do so shortly. Nowadays, older people are healthier, have more money to spend, travel more than in the past and have no time restraints. Moreover, they are especially interested in discovering new travel destinations and gaining new

experiences. They often have special demands such as high quality, comfort and relaxing entertainment facilities (for example, golf courses, spas, cultural workshops).

Increased importance of 'green' and sustainability

More and more EU citizens are interested in products and services focused on the environment and sustainability. This also counts for the tourism industry. When choosing a holiday destination, EU citizens increasingly look at the impact of their travel on the environment and local people. They

are looking for more meaningful ways to travel and contribute to the environment and local communities.

'Experiencing'

Modern day travellers are less interested in mass tourism. Instead, they are looking for new, authentic, memorable experiences which preferably include an educational or cultural element. More and more EU travellers prefer 'value for experience' over 'value for money' and are prioritising activities over the choice of destination.

Useful sources for further research

- Centre for the Promotion of Imports from developing countries (CBI) - <http://www.cbi.eu> - market information about the tourism industry in different EU countries.
- ETC New Media - <http://www.newmediatrendwatch.com> - statistics about the online travel market and the use of Internet in the travel and tourism industry on a global, regional and national level.
- European Tour Operators Association (ETOA) - <http://www.etoa.org> - trade association for European tourism. Has a member directory, including European tour operators and travel agents, which can be used to find potential partners in the EU.
- European Travel Agents' and Tour Operators' Associations (ECTAA) - <http://www.ectaa.org> - statistics, reports and news about the EU travel and tourism industry. Furthermore, it has a member database of national travel agents' and tour operator associations' in the EU which can be used to find potential partners in the EU.
- Eurostat - <http://epp.eurostat.ec.europa.eu> - all kinds of statistics about EU countries.
- European Travel Commission - <http://www.etc-corporate.org> - statistics, reports and news about the European tourism industry.
- European Commission - http://ec.europa.eu/public_opinion/archives/flash_arch_en.htm - publishes Flash Eurobarometers, including an annual barometer about the attitude of Europeans towards tourism.
- IPK International - <http://www.ipkinternational.com> - international tourism consulting group, publishes international travel and tourism data.
- ITB - <http://www.itb-berlin.com> - the most important travel trade show in the EU, held annually in March, in Berlin (Germany). Publishes the World Travel Trends Report every year.
- Tourism Australia - <http://www.tourism.australia.com> - information about worldwide outbound tourism markets, including EU countries.
- Tourism Review - <http://www.tourism-review.com> - news portal with news about the global tourism industry, including EU countries.
- Visit Britain - <http://www.visitbritain.org> - global tourism trend reports and market intelligence reports about different EU countries.
- World Tourism Organisation - <http://www.unwto.org> - statistics and reports about the tourism industry on a global, regional and national level.
- World Travel & Tourism Council - <http://www.wttc.org> - tourism industry news, research and best practises.
- World Travel Market - <http://www.wtmlondon.com> - global event for the travel industry, held annually in November, in London (the UK). Publishes the Global Trends Report and the World Travel Market Industry Report annually.

2 Swedish outbound tourism market

“Although Sweden is among the smaller EU countries in terms of population, the purchasing power of Swedes is high and so is the average number of outbound trips per capita”
(Mr Curt Landin, tourism industry expert)

This chapter will provide information about the Swedish outbound tourism market. In order to get a clear idea of the main destinations in terms of outbound tourism, the chapter starts with an overview of outbound tourism statistics of Sweden. It will continue with information about the general profile of the Swedish traveller. Next, the most important trends will be discussed, followed by an overview of the trade structure. Information about prices and market access requirements will follow. At the end of the chapter a list will be provided with useful sources for further research.

2.1 Swedish outbound tourism

Swedish outbound tourism to developing countries

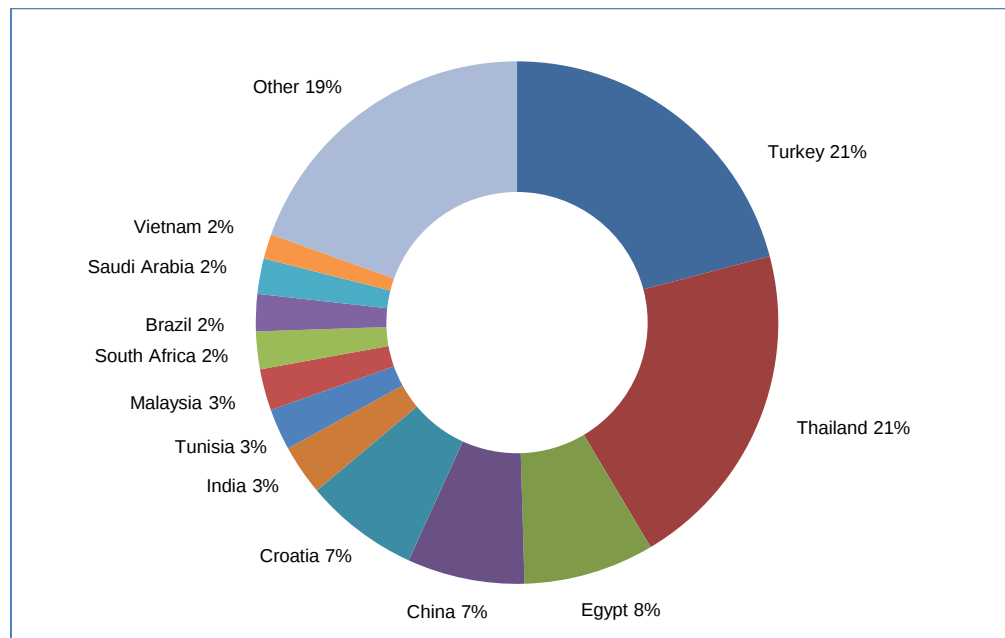
Swedish outbound tourism is increasing, especially to long haul destinations. Swedish outbound trips to developing countries increased by 28% between 2005 and 2008, which was almost twice as much as

total Swedish outbound tourism growth (15%). In 2008, Swedes made an average number of 0.21 outbound trips per capita to developing countries. Outbound trips by Swedes to developing countries represented almost 1.9 million trips in 2008. This was more than 18% of the total Swedish outbound tourism market. Developing countries in East Asia/Pacific were the most popular among Swedes, with more than 36% market share, followed by

- Europe (30%),
- Middle East (13%),
- Africa (10%),
- Latin America (6.9%),
- South Asia (3.8%).

Figure 2.1 gives an overview of the market shares of the most important developing countries destinations for Swedes.

Figure 2.1 Market shares most important developing countries destinations, Sweden, 2008, in %



Source: World Tourism Organisation (2011)

Turkey, with more than 396 thousand trips, was the most popular developing countries destination for Swedes in 2008, followed closely by Thailand (almost 390 thousand trips). Together with Egypt they represented almost half of Swedish outbound

trips to developing countries. Table 2.1 gives an overview of the development of Swedish outbound trips to the five most visited developing countries per region in 2008.

Table 2.1 Most visited developing countries per region, Sweden, 2008, x thousand, growth 2005 - 2008 in %

Developing countries Destination	2008	Growth 2005 - 2008
East Asia / Pacific	685.4	53%
Thailand	389.7	75%
China	137.7	25%
Malaysia	48.6	50%
Vietnam	29.1	63%
Indonesia	23.1	-8.2%
Europe	562.9	3.1%
Turkey	396.5	-0.5%
Croatia	134.4	5.5%
Montenegro	7.9	59%
Albania	6.9	70%
Serbia	6.9	38%
Middle East	255.4	51%
Egypt	153.4	25%
Saudi Arabia	41.5	1091%
Oman	27.8	77%
Lebanon	21.6	18%
Jordan	11.1	113%

Developing countries destination	2008	Growth 2005 - 2008
Africa	189.2	28%
Tunisia	48.7	34%
South Africa	44.1	24%
Morocco	26.8	0.6%
Nigeria	24.3	110%
Tanzania	10.8	36%
Latin America	131.2	6.5%
Brazil	43.6	-4.7%
Chile	13.7	4.8%
Venezuela	11.0	70%
Peru	9.7	41%
Costa Rica	8.7	47%
South Asia	72.2	66%
India	59.0	105%
Pakistan	3.8	-17%
Sri Lanka	3.7	-31%
Maldives	3.5	169%
Nepal	2.0	135%

Source: World Tourism Organisation (2011)

When looking at the development of Swedish outbound trips to developing countries per region, all regions saw growth between 2005 and 2008. South Asia showed the strongest growth (66%), followed by East Asia / Pacific (53%) and the Middle East (51%). When looking at a country level, the fastest growing markets were Saudi Arabia (1091%), Maldives (169%), Nepal (135%), Jordan (113%) and Nigeria (110%).

Swedish outbound tourism worldwide

It is estimated that about 85% of Swedish outbound trips consist of leisure trips and 15% of business trips. The total Swedish outbound tourism market represented more than 10.5 million trips in 2008 and increased by 15% between 2005 and 2008. Europe, with a market share of almost 80%, was the most popular destination region for Swedes. East Asia/Pacific came next with a share of 7.8%, followed by Latin America (5.4%), the Middle East (4.1%), Africa (1.8%) and South Asia (1.1%). Spain, with 11%, was the most popular outbound tourism destination for Swedes in 2008, followed by Norway (11%), Germany (8.1%), Denmark (7.6%), the UK (7.1%), France (7.0%), Italy (4.4%), USA and Turkey (both 3.8%) and Thailand (3.7%). These ten countries together represented more than two thirds of the Swedish outbound tourism market.

Swedish air passenger transport

Swedish international air passenger transport has started to recover from the economic recession. Whereas international air passenger transport from Sweden decreased by 8.4% between 2008 and 2009, it increased again by 7.0% in 2010 reaching a number of more than 10.4 million passengers in 2010. Although destinations outside Europe represented only 11% of total Swedish air passenger transport, they showed much stronger growth in 2010 (19%) than destinations within Europe (5.7%).

Of the destinations outside Europe, the countries that received the highest number of Swedish air passengers in 2010 were Thailand (21%), USA (21%), Egypt 15%), Russia (8.8%), Tunisia (5.4%), China (5.3%), Qatar (4.9%) and Iraq (4.5%). The destinations outside Europe with the highest growth between 2007 and 2010 were Qatar (2480%), Iraq (1178%) and Egypt (126%).

The most important airport in Sweden is the airport of Stockholm-Arlanda. Some smaller important airports are Göteborg-Landvetter, Stockholm-Skavsta, Stockholm-Bromma and Malmö Airport.

Swedish international tourism expenditure

Sweden is the eighth largest market in the EU in terms of international tourism expenditure, behind Belgium and Spain, but ahead of Austria and Denmark. Although the country has a small number

of inhabitants compared to other EU countries, Swedish purchasing power is high. Swedish international tourism expenditure declined by 19% between 2008 and 2009 to €8.7 billion, which means a decrease in international tourism expenditure per capita from €1.167 in 2008 to €931 in 2009. This decline was the result of the global economic recession. However, international tourism expenditure by Swedes is estimated to have increased by 3.8% in 2010.

Forecast

According to a report from Tillväxtverket (the Swedish Agency for Regional Growth and Development), Swedish outbound trips decreased by 11% in 2009 as a result of the recession. Nevertheless, signs of recovery were noticeable during 2010 and predictions for 2011 are very positive.

A recent survey of travel agency Ticket revealed that the number of international departures in January 2011 increased by 21% compared to the same period last year. Furthermore, bookings for the summer of 2011 have increased by 10% compared to last summer. Table 2.2 gives an overview of the most popular international departures for Sweden in January 2011 and the top ten booked destinations for the summer of 2011 (booked before March 2011).

As can be seen, Spain, Thailand and Egypt are popular destinations for Swedes during the winter season. For the summer of 2011, Greece, Turkey and Spain are the leading destinations. The common factor of these destinations is that they all have a warm and sunny climate. In general it can be concluded that Swedes prefer to travel to warm and sunny destinations.

Table 2.2 Most popular international departures in January 2011 and most booked destinations for the summer of 2011, Sweden, ranking in numbers

Departures January 2011, destination	Ranking last year	Bookings summer 2011, country	Ranking last year
1. Gran Canaria, Spain	2	1. Greece	1
2. Phuket, Thailand	1	2. Turkey	2
3. Tenerife, Spain	4	3. Spain	3
4. Hurgada, Egypt	5	4. USA	5
5. Bangkok, Thailand	3	5. Italy	6
6. Krabi, Thailand	6	6. Cyprus	4
7. Sharm el Sheikh, Egypt	7	7. UK	9
8. Fuerteventura, Spain	8	8. France	8
9. London, UK	10	9. Croatia	10
10. Lanzarote, Spain	9	10. Bulgaria	7

Source: Ticket (2011)



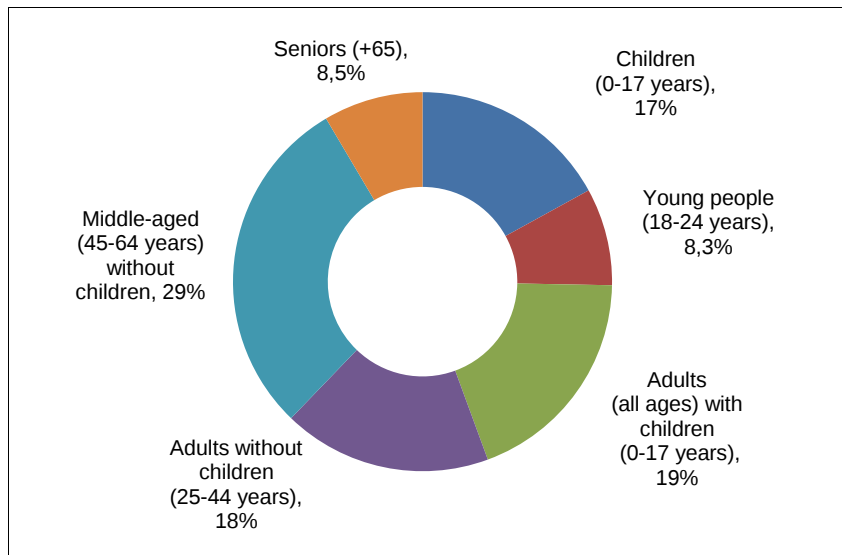
2.2 Swedish traveller profile

Outbound trips per age category

Figure 2.2 gives an overview of the share of different age categories in terms of outbound tourism (excluding the Nordic countries and the Baltic States) in 2009. As can be seen, middle-aged

Swedes (45-64 years) travelling without children made up the largest part of outbound trips (29%). Adults with children between 0-17 years came next (19%), followed by adults between 25-44 years without children (18%).

Figure 2.2 Share of different age categories in outbound trips (excluding the Nordic countries and Baltic States), Sweden, 2009, in %



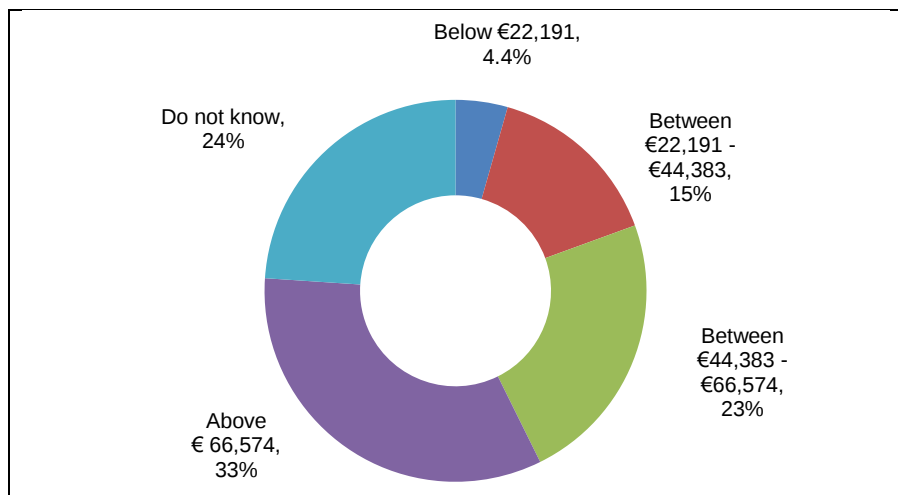
Source: Vagabond travel Survey 2010

Outbound trips per income group

Figure 2.3 gives an indication of the share of different income groups in terms of outbound trips to Thailand in 2009. Households with an income above €66,547 represented the largest share (33%)

of all outbound trips to Thailand in 2009. In general it can be concluded that the higher the income of Swedes, the further or the more they travel.

Figure 2.3 Share of different income groups in outbound trips to Thailand, Sweden, 2009, in %



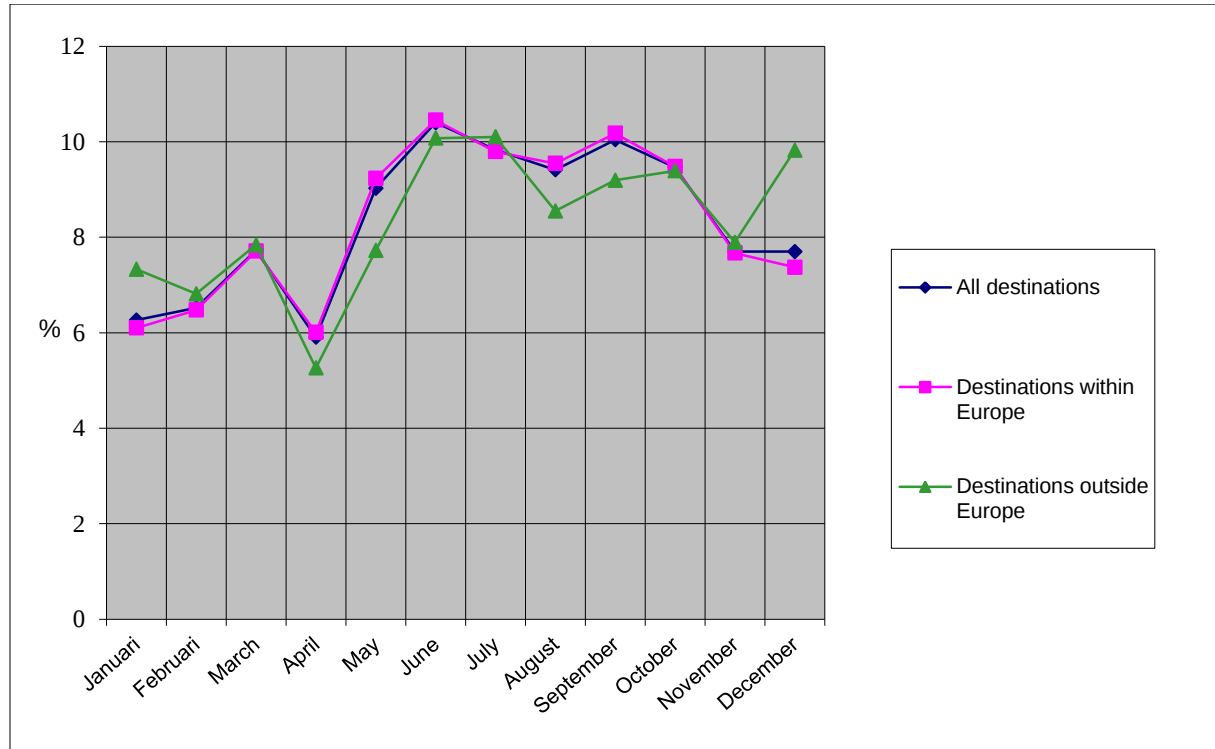
Source: Vagabond travel Survey 2010

Favoured months for outbound trips

Many Swedes travel in the summer period. Figure 2.4 gives an overview of Swedish air passenger

transport per month in 2010, divided into destinations within and destinations outside Europe.

Figure 2.4 Swedish air passenger transport, per month, 2010, in %



Source: Transportstyrelsen (Swedish Transport Agency 2011)

In the case of destinations within Europe, the favoured months to travel are June, September, July and August. For destinations outside Europe, July, June, December and October are the most popular. The reason that December and October are popular months for travelling to destinations outside Europe is that many Swedes want to escape from the cold Scandinavian winter and prefer to travel to warm, long haul destinations.

Regions of origin

Most Swedish outbound travellers are from the province of Stockholm (about 30% market share),

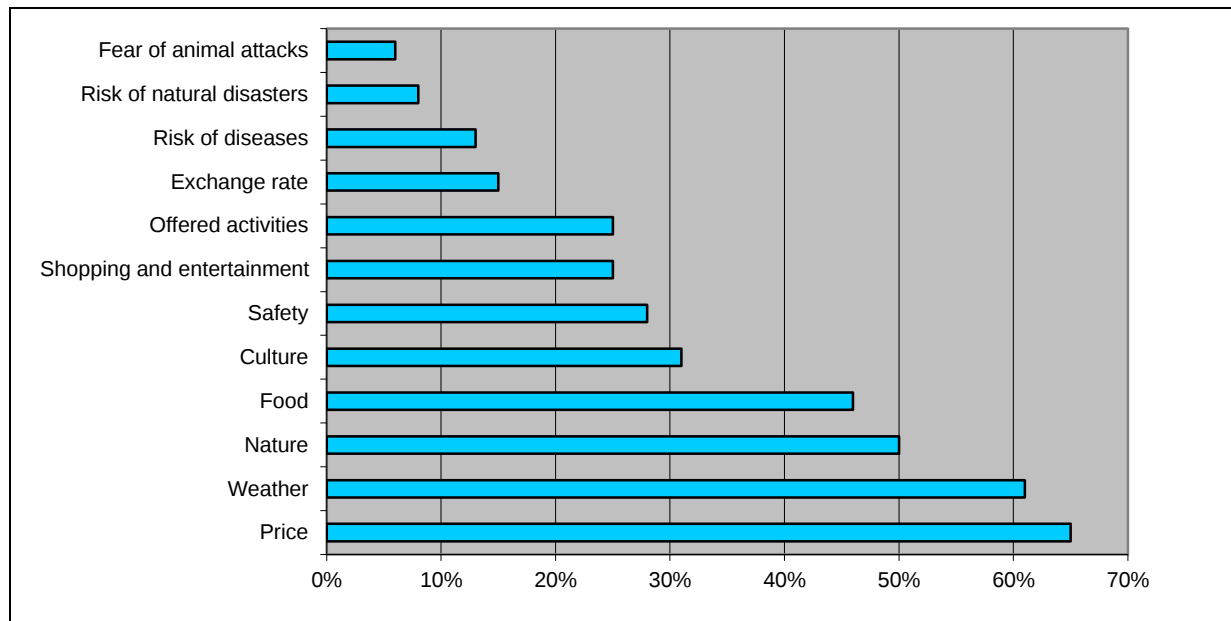
followed by the provinces of Västra Götaland (16%) and Skåne (13%). In terms of the average number of trips per province per capita, the province of Stockholm also lies ahead with 1.6 trips per capita followed by the provinces of Södermanland (1.3 trips) and Uppsala (1.3 trips).

Choice of destination

There are several factors that have an influence on the choice of a holiday destination for Swedes.

Figure 2.5 gives an overview of these factors based on a 2011 survey by research company Novus (multiple answers were possible).

Figure 2.5 Factors that influence the choice of a holiday destination for Swedes, 2011, in %



Source: Novus (2011)

As can be seen, price is the most important factor (65%). Other important elements are the weather (61%), nature (50%), food (46%), culture (31%) and safety (28%) at a destination.

2.3 Trends

Tourism companies in developing countries that want to target the Swedish market should take trends on the Swedish market into account. The most important trends are discussed below.

Recovering demand for outbound tourism

Swedish outbound tourism was affected by the global recession and decreased by an estimated 11% in 2009. However, recovery began in 2010 and 2011 has started with a significant increase in bookings of outbound trips compared to the same period the year before. Moreover, the favourable exchange rate of the Swedish Crown against the Dollar or Euro stimulates Swedish demand for outbound tourism even more.

Increasing older age group

As in many EU countries, the older age group in Sweden is getting larger. In 2009, Swedes at the age of 45 and above made up more than 37% of the Swedish outbound tourism market. As the older age group continues to grow, so will the growth in the number of outbound trips made by this group. The Swedish older age group is especially interested in adventure, cultural, luxury and health and wellness trips.

Search for authentic experiences

Swedish travellers are looking for new, memorable experiences, increasingly beyond Europe. They

want to discover new countries and are looking for more authentic experiences with local cultures and nature. This can be found in many developing countries.

Increased demand for niche/thematic holidays

Swedes are increasingly interested in niche holidays. Demand for niche products such as adventure, diving, golf, safari, spa, culture, religion, honeymoons and cruises is increasing and niche tour operators are expanding their market shares.

Growing demand for all-inclusive

Demand for all-inclusive holidays is increasing in Sweden, especially among families with small children. There is a discussion going on in Sweden about whether or not all-inclusive trips affect the income of the local economy. As many all-inclusive travellers stay within their resort/hotel, they often spend little money outside in the local area. In addition, a lot of all-inclusive hotels are owned by foreign companies and food and drinks are often not bought from local companies.

Increased demand for combination trips

Many Swedish travellers want to combine different activities during their holiday. Sun and beach holidays are, for example, combined with a visit to a big city or a safari is combined with visiting local communities. Destinations that can offer many different activities are particularly in demand.

More city trips

Swedes are showing an increasing interest in city trips. According to a survey of the Swedish travel agency Ticket, trips to big cities have increased by

15% in April 2011, compared to the same period last year. In April 2011, the most booked city trips by Swedes were New York, London, Barcelona, Paris, Rome, Prague, Amsterdam, Bangkok, Berlin and Miami.

‘Green and fair’ trips

Swedes increasingly focus on eco-friendly and sustainable tourism. As a result, many large tour operators follow the code of conduct of ECPAT (End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes) and an increasing number of Swedish tour operators are developing environmental and social codes of conduct.

Shorter trips

Swedes have five weeks of paid holidays per year. Instead of going on one summer holiday five weeks in a row, Swedes divide their holidays into several shorter breaks spread over the year. For example, two weeks in summer, two weeks in winter and one week in spring. One of the drivers for this development is lower prices in the low season.

Swedish speaking guide

Although Swedes generally have excellent English skills, many Swedish travellers still prefer to have a Swedish speaking guide when they go on a package holiday that includes excursions/activities. This is especially the case for people in the 50+ age category.

Increased use of the Internet

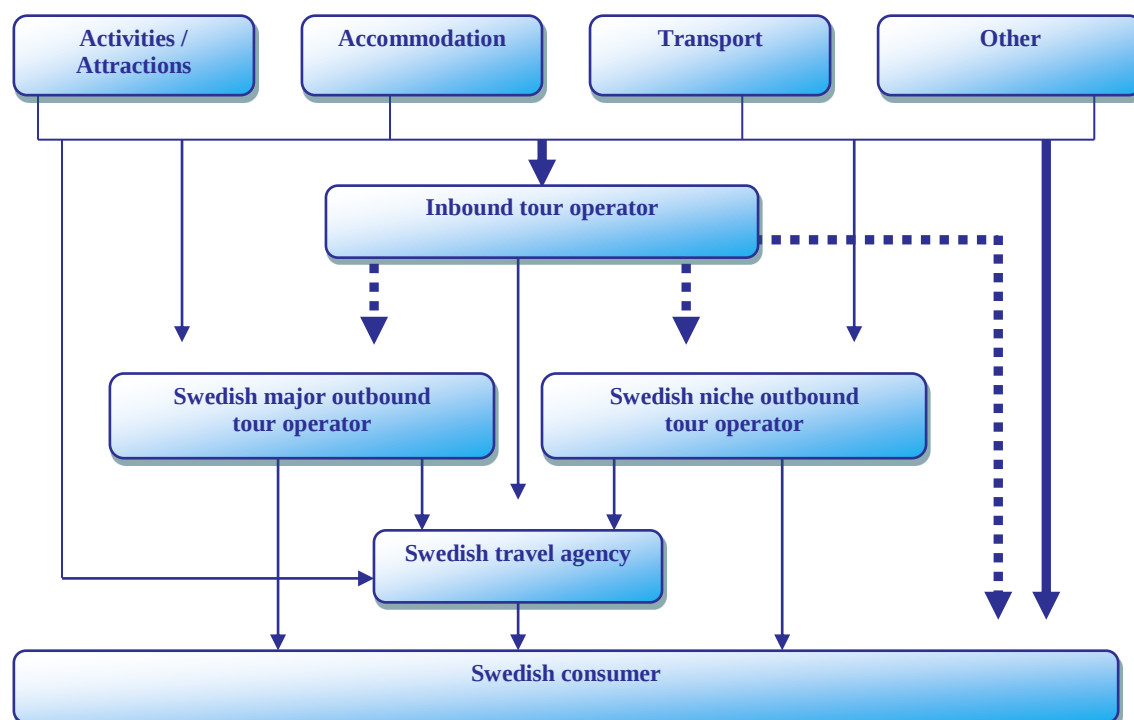
Swedish travellers are increasingly influenced by other travellers. They look at the experiences of others on the Internet (for example via Facebook, Twitter) and read rating and review websites such as TripAdvisor. Nowadays, the Internet is one of the most important sources of information for Swedish travellers. They use it to look for information and planning and increasingly for booking purposes as well.

2.4 Trade structure

Holiday trips can reach Swedish consumers in various ways. Figure 2.6 gives an overview of the trade structure of tourism products for Sweden. The thick lines represent the most important channels for tourism providers in developing countries: inbound tour operators, major and niche outbound tour operators and Internet. The dotted lines represent the most important trade channels for inbound tour operators in developing countries: outbound tour operators and Internet.

Note: In the case of specific niche markets (like horseback riding, bird watching or diving) Swedes sometimes also purchase tourism products from foreign tour operators or travel agencies, for example in the UK or Denmark.

Figure 2.6 Trade structure of tourism products for Sweden



Source: Facts Figures Future (2011)

Inbound tour operators

Inbound tour operators are a very important trade channel for local tourism providers, as many bookings from the Swedish market take place through an inbound tour operator. The inbound tour operator selects different elements of a holiday (such as accommodation, transport, activities) and offers complete holiday packages to Swedish outbound tour operators, Swedish travel agencies or directly to Swedish consumers.

It will probably be easier for tourism providers in developing countries to establish contact with a local inbound tour operator than with Swedish tour operators and travel agencies, as inbound tour operators are established in their own country. In addition, many tourism providers in developing countries only offer one or a few tourism products (for example, accommodation or an activity). As most Swedish tour operators and travel agencies are interested in complete holiday packages and not in one product, and as they generally buy these packages from an inbound tour operator, inbound tour operators are the recommended trade channel for tourism providers in developing countries.

Outbound tour operators

Swedish consumers often buy their holiday packages directly from Swedish tour operators, especially when it concerns long haul holidays. Swedish outbound tour operators are therefore a very important trade channel for inbound tour operators. They offer complete holiday packages to Swedish travel agencies and consumers and often work together with one or a few inbound tour operators who select the elements of packages for them. Sometimes Swedish outbound tour operators also work directly with local tourism providers, especially hotels. A distinction can be made between major outbound tour operators and niche outbound tour operators.

Major tour operators

Major tour operators mainly offer standardised, mass tourism products. The Swedish tour operating market is dominated by three major charter tour operators which together hold about 80% of the market:

- Ving Sverige, owned by Thomas Cook (30% market share) - <http://www.ving.se>.
- Fritidsresor, owned by TUI Travel (30% market share) - <http://www.fritidsresor.se>.
- Apollo Resor, owned by Kuoni (20% market share) - <http://www.apollo.se>.

All three tour operators have their own airlines and offer various holiday packages to developing countries. Their packages are relatively basic and standardised and generally only include flight and accommodation. The major charter tour operators generally work with one or a few preferred inbound tour operators or even have their own local sales offices in the destination country. Furthermore, they demand very large volumes from their local

suppliers. It is therefore quite difficult for tourism providers and inbound tour operators in developing countries to meet the demands of these major tour operators and to work with them on a profitable basis.

Besides the three major charter tour operators, Sweden also has a lot of smaller-scaled, general tour operators (that offer all kinds of holidays) and niche tour operators (that focus on one or a few specific markets).

Niche tour operators

Niche tour operators focus on one or a few specific markets, for example adventure, culture, diving, nature, spa or a specific region (for example Africa). Swedish niche tour operators often work together with inbound tour operators, but sometimes also approach local tourism providers directly. This depends very much on the destination and the local knowledge that they possess. If Swedish niche tour operators know a local market well, they will contact local tourism providers directly. This is, for example, the case for Thailand. If they do not have a lot of local knowledge, for example because a country is not yet a well-known tourism destination, they will prefer to work with an inbound tour operator.

As niche tour operators offer specialised and often tailor-made products, they are more dependent on local partners than major tour operators. Tourism providers and inbound tour operators in developing countries are therefore advised to focus on Swedish niche tour operators active in the same niche market as themselves. For example: a beach resort in the Philippines would be advised to focus on Swedish tour operators and travel agencies offering sun and beach holidays. Or, an inbound tour operator from South Africa selling safari holiday packages would be advised to focus on Swedish tour operators and travel agencies specialised in safaris and/or Africa. Some interesting potential partners in Swedish niche outbound tourism markets can be found in Chapter 4 'Swedish niche outbound tourism markets'.

Travel agencies

Travel agencies sell travel packages for tour operators to consumers through the Internet and/or their office. They also sell weekend trips and make arrangements for flight, train and bus tickets and accommodation. Internet travel agencies are used more for standardised trips, whereas the offices of travel agencies are used more for specialised and tailor-made trips. Some of the major players on the Swedish online travel agency market are:

- Mr Jet (<http://www.mrjet.se>, part of Orbitz)
- Resfeber (<http://www.resfeber.se>)
- Seat24 (<http://www.seat24.se> - part of the European Travel Interactive Group)
- Travelpartner (<http://www.travelpartner.se>, part of the European Travel Interactive Group)

- Travelstart (<http://www.travelstart.se>, part of TUI Travel)

Travel agencies still play an important role in Sweden and the sales of Swedish travel agencies increased by 8% in 2010.

The three largest travel agency chains in Sweden are:

- TICKET - <http://www.ticket.se> - more than 80 stores.
- Resia - <http://www.resia.se> - around 60 stores.
- Big Travel - <http://www.bigtravel.se> - approximately 28 stores.

Besides the online travel agencies and the three major travel agency chains, there are also many smaller-scaled, general travel agencies and niche travel agencies in Sweden. An increasing number of Swedish travel agencies (especially travel agencies that focus on niche markets) are looking for new ways of earning income and are taking on the role of tour operator. This means they buy directly from inbound tour operators and sometimes tourism providers in developing countries instead of only selling tourism products for Swedish tour operators. Tourism companies in developing countries could therefore also try to contact Swedish travel agencies, particularly travel agencies focusing on niche markets.

Internet

The Internet is a very important trade channel to target the Swedish outbound tourism market for both tourism providers and inbound tour operators in developing countries. An increasing number of Swedish consumers book their own travel arrangements instead of via travel agencies or tour operators in Sweden. They use the Internet to look for information and book directly online with tourism providers or inbound tour operators in the destination country. In 2010, 25% of Swedes used the Internet to book a holiday accommodation and 33% used it to book other travel arrangements (tickets, car rental, excursions, etc). It is therefore advisable to have a high quality website and a good website promotion strategy, not only to attract more Swedish consumers, but also to increase the chance of being found by Swedish tour operators and travel agencies looking for new partners.

Note: the trade structure of tourism products for the EU market is more or less the same as the trade structure of tourism products for Sweden.

2.5 Prices

Price

Price plays a relatively important role in Swedish demand for outbound tourism. However, other elements such as the image of a country, weather, activities offered, nature, culture and safety are also important. Modern day Swedish travellers are looking for 'value for money' and if they see the added value of a tourism product, they are not unwilling to pay a higher price.

The prices of holiday packages offered by Swedish tour operators vary widely as they depend on a lot of factors like destination, type of holiday, seasonality, availability, mode of transport, number of travellers, length of the trip, type of accommodation and included activities. For an overview of consumer prices for different types of holiday packages to developing countries offered by Swedish tour operators, refer to Chapter 4 'Swedish niche outbound tourism markets'.

Price developments

The prices of holiday packages in Sweden have been relatively stable during the last five years. Air fares in Sweden are rising due to higher fuel and non-fuel costs. However, the number of low cost airlines that fly from Sweden is increasing as well. To avoid higher air fares, many Swedes travel, for example, to London with a low cost airline and then take a flight to a long haul destination from there. When considering the price of charter flights, the ticket price has increased a little.

Exchange rates

Another factor that influences demand for outbound tourism is currency fluctuations. Table 2.3 gives an overview of the development of the exchange rate of the Swedish Crown (SEK) against the Euro (EUR) and US Dollar (USD) between 2000 and 2011.

Table 2.3 Average exchange rate of the Swedish Crown (SEK) against the Euro and US Dollar, 2000-2011

	2000	2005	2006	2007	2008	2009	2010	2011 until May
Euro	9.14	9.29	9.26	9.25	9.60	10.62	9.55	8.94
USD	8.45	7.45	7.36	6.75	6.51	7.60	7.20	6.26

Source: Oanda (2011)

The exchange rate of the Swedish Crown against the Euro and US Dollar fell between 2009 and May 2011. This means that Swedes currently pay fewer Swedish Crowns for one Euro or one US Dollar. The strong position of the Swedish Crown is stimulating demand for outbound tourism, as the Euro or US Dollar are used or accepted in many outbound destinations.

Margins

Swedish tour operators generally receive a commission of between 10-35%. If involved, travel agencies receive a commission of around 4% when it concerns charter holidays and between 6-8% when it concerns other holidays. However, these indications are quite rough, as margins vary widely depending on factors such as product characteristics, demand and competition. In general, it can be said that the more tailor-made the product is, the higher the commission.

2.6 Market access requirements

Tourism companies in developing countries seeking to target the Swedish outbound tourism market have to be aware of the market access requirements of potential Swedish partners and governments. There are no legislative requirements in Sweden applicable to tourism. However, non-legal requirements do exist. Examples of non-legal requirements are standards and certifications. The most relevant ones for the tourism industry will be discussed below. Although these standards and certifications are not obligatory, they could help tourism companies in developing countries to distinguish themselves from competitors and to increase their credibility.

Quality management system

Tourism companies are strongly advised to have a quality management system. It is very important that they verify their tourism product in terms of health and safety. An example of a quality management system is the ISO 9000 standard. The standard represents requirements for the development and implementation of a quality management system within an organisation.

ISO 26000

ISO 26000 is a guidance standard on Social Responsibility (SR), it is not a certification. ISO 26000 has recently been developed and is the most comprehensive and global guidance standard regarding social responsibility. It addresses seven core subjects of social responsibility: organisational governance, human rights, labour practices, the environment, fair operating practices, consumer issues, and community involvement and development.

Travelife

Travelife is a tourism certification system that has been set up to support an efficient and cost effective introduction of sustainability principles within the tourism industry. At the moment only hotels can apply for the Travelife certificate. The three largest charter tour operators of Sweden recently joined Travelife in March 2011 and are already working with some Travelife certified hotels. Travelife aims to broaden its work and is developing a certification system for tour operators as well.

Tourism companies in developing countries are recommended to ask potential Swedish partners about their requirements and preferences, as meeting these requirements and preferences could increase their opportunities on the Swedish market significantly.

Useful sources for further research

- Association of Swedish Travel Agents and Tour Operators - <http://www.srf-org.se> - information about the Swedish tour operating and travel agency market, including a member list.
- European Tourism Research Institute (ETOUR) - <http://www.miun.se/etour> - publications about different tourism markets in and outside of Sweden.
- ISO - <http://www.iso.org> - information about the ISO 9000 and ISO 26000 standards.
- Kairos Future - <http://www.kairosfuture.com> - international research and consulting company. Annually publishes the Scandinavian Travel Trend Survey.
- Natural Consulting - <http://www.naturalconsulting.se> - consulting company that helps organisations to develop tourism destinations and entities.
- Resia - <http://www.resia.se> - second largest travel agency chain in Sweden. Offers interesting press releases, surveys and research on its website about the Swedish tourism industry.
- Resurs - <http://www.resursab.se> - conducts research about the Swedish tourism market, including outbound tourism.
- Statistics Sweden - <http://www.scb.se> - all kinds of statistics about Sweden.
- Sweden.se - <http://www.sweden.se> - the official website of Sweden.
- Swedish Agency for Economic and Regional Growth - <http://www.tillvaxtverket.se> - publishes an annual report about the Swedish tourism industry, including a chapter about outbound tourism.
- Swedish Chambers - <http://www.swedishchambers.se> - offers contacts, knowledge and capacity to exporters in developing countries.

- Swedish Tourist and Travel Industry Federation - <http://www.rtsverige.se> - information and forecasts about the Swedish tourism industry.
- Swedish Transport Agency - <http://www.transportstyrelsen.se> - statistics about international air transport from Sweden.
- Ticket - www.ticket.se - largest travel agency chain in Sweden. Offers interesting press releases, surveys and research on its website about the Swedish tourism industry.
- Tourism Australia - <http://www.tourism.australia.com> - information about Nordic (including Sweden) tourism markets.
- Travelife - <http://www.travelife.eu> - information about the Travelife tourism certification system.
- TUR - <http://www.tur.se> - largest travel event of Sweden. News articles, trends, press releases and surveys about the Swedish tourism market.
- Vagabond - <http://www.vagabond.se> - monthly Swedish consumer travel magazine. Publishes press releases, articles and surveys about the Swedish tourism market on its website.
- Visit Britain - <http://www.visitbritain.org> - global tourism trend reports and market intelligence reports about different EU countries, including Sweden.

3 Finding potential Swedish trade partners

“Travel events are one of the most important sources to find potential trade partners”
(Mr Curt Landin, tourism industry expert)

Swedish tour operators and travel agencies are one of the most important trade channels to enter the Swedish tourism market, especially for inbound tour operators. Some Swedish tour operators and travel agencies visit the countries they are interested in and search there for local partners themselves. However, it is always better to be pro active. But how can tourism providers and inbound tour operators in developing countries find potential Swedish trade partners? This chapter will discuss the most important possibilities.

3.1 Travel events

Many Swedish tour operators and travel agencies had the first contact with their current local trade partners at travel events. Tourism providers and inbound tour operators in developing countries seeking to enter the Swedish outbound tourism market are therefore advised to attend, and moreover, exhibit at travel events, especially in Sweden. Travel trade events are important in order to get into contact with potential Swedish partners; travel consumer events are important to create awareness among Swedish consumers. A lot of travel events have separate days for trade visitors and consumers.

Good preparation for travel events is vital. In general, a lot of companies exhibit at travel events. It is therefore important to scan the list of exhibitors before visiting the event and decide which companies could be interesting partners.

Many trade fairs provide the option of making pre appointments with exhibitors on their website. Making pre appointments is strongly recommended, since in this way you are sure that exhibitors will have time to talk to you. Pre appointments should already be made 4 to 5 months in advance. Providing good promotion material at the stand is also very important. Use posters, pictures and brochures/leaflets to draw the attention of visitors. Instead of handing out heavy brochures, it would be wise to put information on CD-roms and give these to visitors.

The most important travel event in Sweden is TUR (<http://www.tur.se>), which is held every year in March, in Göteborg. TUR represents about 980 national and international exhibitors. Other, smaller travel events in Sweden are:

- Travel - <http://www.travel2011.se> - trade and consumer travel event, held annually, in March, in Malmö with about 120 national and international exhibitors.
- Vildmarksmässan - <http://www.vildmarksmassan.se> - outdoor and adventure event including adventure tourism, held annually, in March, in Stockholm.

Many Swedish travel professionals also visit other travel events in the EU such as ITB Berlin or the World Travel Market in London. Refer to Table 3.1 for an overview of important travel events in other EU countries.

Table 3.1 Travel events in the EU

Where	What	When
Denmark (Herning)	Ferie for Alle (http://www.ferieforalle.dk)	Annually, February
Finland (Helsinki)	Matka (http://www.matkamessut.fi)	Annually, January
France (Paris)	IFTM Top RESA (http://www.iftm.fr)	Annually, September
Germany (Frankfurt)	IMEX Incentives, meetings and events (http://www.imex-frankfurt.com)	Annually, May
Germany (Berlin)	ITB Berlin (http://www.itb-berlin.com)	Annually, March
Norway (Oslo)	Reiseliv (http://www.messe.no/en/ntf/Projects/reiseliv)	Annually, March
Spain (Barcelona)	EITBM Meetings and events (http://www.eibtm.com)	Annually, December
Spain (Madrid)	FITUR (http://www.fitur.ifema.es)	Annually, January
The Netherlands (Utrecht)	Vakantiebeurs (http://www.vakantiebeurs.nl)	Annually, February
The UK (London)	World Travel Market London (http://www.wtmlondon.com)	Annually, November

Source: Facts Figures Future (2011)

3.2 Travel trade associations

Almost all EU countries have a trade association that represents national travel and tourism companies, including tour operators and travel agencies. In Sweden this is SRF, the Association of Swedish Travel Agents and Tour Operators (<http://www.srf-org.se>). The association has about 200 members, which are mainly smaller-scale tour operators and niche tour operators and travel agencies. Tourism providers and inbound tour operators in developing countries can contact the association for information about and contact data of members. SRF also provides a list of members on their website. Select the English version, click on 'List of members' and select 'View all companies'.

There are also regional travel trade associations. An interesting association for Latin American countries is, for example, Lata Nordic (<http://www.lata-nordic.com>), a travel trade organisation that promotes travel from Scandinavia (especially Sweden) to Latin America. They organise familiarisation trips for Nordic tour operators and travel agencies, work with embassies and offer matchmaking activities. Members are both Nordic and Latin American tourism companies. For Asian countries, PATA Sweden (<http://www.patasweden.se>) would be interesting, as they promote travel from Sweden to Asia and the Pacific. Contact these organisations or visit their websites for more information about members.

3.3 National tourism boards / Tourism promotion organisations

Tourism providers and inbound tour operators in developing countries are advised to register with their national tourism board and/or tourism promotion organisation. National tourism boards and/or tourism promotion organisations often have an extensive network, a lot of knowledge about

international business and, in addition, sometimes organise matchmaking events. Moreover, some Swedish tour operators indicated that they found their current local tourism trade partners through tourism boards or tourism promotion organisations in the destination country.

3.4 Internet

Internet research

The Internet is also a very important source to find potential partners. On the Internet you can find exhibitor lists of travel events, member lists of travel and tourism trade associations, but also company databases. Some interesting Internet sources where tourism companies in developing countries could look for potential Swedish partners are:

- Allabolag - <http://www.allabolag.se> - Swedish company database (only in Swedish, but you can use Google translate for translation, <http://translate.google.com>). Go to 'Bransch', select 'Resebyrå & Turism' and choose 'Researrangemang' or 'Resebyråer' for a list of Swedish tour operators and travel agencies.
- Kompass - <http://www.kompass.com> - paid worldwide B2B company search engine. Type in the keyword 'Tour operator' and select 'Sweden' for an overview of Swedish tour operators.
- Reseguiden - <http://www.reseguiden.se> - Swedish travel comparison site (you can use Google translate for translation). Go to 'Destinations', select your continent and click on your country for an overview of travel deals to your country and the tour operators/travel agencies that offer these deals.
- Who-is-Where - <http://www.whoiswhere.se> - paid Swedish travel directory with data of more than 3,000 companies in the Swedish travel and tourism industry, including tour operators.

- World Tourism Directory - <http://www.worldtourismdirectory.com> - an international country by country database for the tourism industry. Go to 'Country directories', click on 'Europe' and select 'Sweden' for an overview of different categories of tourism related companies and organisations in Sweden.

In addition to the sources mentioned above, search engines such as Google (<http://www.google.com>) can also be used to look for potential partners. Search with keywords like 'Tour operator', 'Travel agency' or 'Holiday packages' and your country name. Limit your search by only searching for Swedish country extensions. You can do this by typing 'site:.se' behind the keywords you are searching with. It could be very helpful to translate your search keywords into Swedish.

Website

Sweden has the highest Internet penetration rate in the EU (92%). Having a professional, high quality website is therefore very important for tourism companies in developing countries seeking to target the Swedish market, not only to increase their credibility and professional image, but also to increase the chance of being found by Swedish tour operators and travel agencies and increase their exposure among Swedish travellers. A website has to appeal immediately to visitors. Pictures and videos will help to present information in an attractive way. Other important elements that tourism companies in developing countries should use on their websites are clear product descriptions, testimonials of partners with whom they are already working, customer testimonials and obtained certifications/awards and memberships.

It is also important to have a good website marketing strategy. A tourism company can have a good website, but if it does not pay attention to website marketing, potential partners and consumers might not find the website. Important tools for website marketing are Search Engine Marketing (SEM), Affiliate Marketing, Google AdWords, submitting a website to portals and directories, exchanging links with related websites and social media. The Australian Tourism Data Warehouse has developed the 'Tourism e-kit' that advises tourism providers on how to make use of possibilities on the Internet. It covers a wide range of subjects from how to develop a good website to search engine marketing and online product distribution. For more information, go to http://www.atdw.com.au/tourism_e_kit.asp.

Social media

Social media play an increasingly important role in the destination selection process of both Swedish tour operators and consumers. Almost one fifth of Swedes use social media when they are in the decision making process of their holiday destination and this percentage is expected to increase

significantly. Therefore, tourism companies in developing countries are advised to make use of social media, not only to promote their product, but also to monitor what is written about their company. It is very important to respond quickly and in a positive way when something negative has been written.

Facebook (<http://www.facebook.com>) is the most important social media network in Sweden. Sweden has the third largest percentage of Facebook penetration in the EU (47%), behind Denmark and the UK (both 49%). Tourism companies in developing countries should therefore make a company page on Facebook and participate in Facebook travel groups. Other important social media platforms for the Swedish tourism market are:

- Lonely Planet - <http://www.lonelyplanet.com> - travel community.
- Mintur - <http://www.mintur.se> - Swedish online travel community.
- Resdagboken - <http://www.resdagboken.se> - Swedish online travel community.
- Reseguiden - <http://www.reseguiden.se> - popular travel search engine and community (only in Swedish).
- Thorn Tree Travel Forum of Lonely Planet - <http://www.lonelyplanet.com> - travel community.
- Travelforum - <http://www.travelforum.se> - Swedish forum for travellers.
- TripAdvisor - <http://www.tripadvisor.se> - travel forum.
- Twitter - <http://www.twitter.com> - a rapidly growing online community.
- Vagabond - <http://www.vagabond.se> - Swedish consumer travel magazine with an online community.
- YouTube - <http://www.youtube.com> - video sharing platform.
- Zoover - <http://www.zoover.se> - website with holiday reviews of destinations and accommodations all over the world.

3.5 Travel magazines and television programmes

Swedish travel trade and consumer magazines contain news articles about the tourism industry, including news about tour operators and travel agencies. Swedish tour operators and travel agencies advertise in travel magazines as well. Some magazines also have a travel guide/directory on their website. It can therefore be worthwhile for tourism companies in developing countries to check Swedish travel and tourism trade and consumer magazines and their websites in order to find potential trade partners. According to industry experts, advertising in Swedish travel magazines could also be useful for branding. Table 3.2 gives an overview of the most important travel trade and consumer magazines in Sweden.

Table 3.2 Travel trade and consumer magazines in Sweden

Who	What	Frequency
Aftonbladet resa (http://www.aftonbladet.se)	Consumer travel magazine	10 times a year
Allt om Resor (http://www.alltomresor.se)	Consumer travel magazine	Monthly
Escape360 (http://www.escape360.com)	Consumer luxury travel magazine	8 times a year
När & Fjärran (http://sverigestidskrifter.se/medlem/tidskrifter/nar-fjaran)	Consumer travel magazine	Monthly
RES (http://res.se)	Consumer travel magazine	6 times a year
Travelnews (http://www.travelnews.se)	Travel trade magazine	10 times a year
TTG Nordic (http://www.ttg nordic.com)	Nordic travel trade magazine	Monthly
Turism & Resor (http://www.hitodit.com)	Travel trade magazine	6 times a year
Vagabond (http://www.vagabond.se)	Consumer travel magazine	Monthly
Vi Tidningen (www.vi-tidningen.se)	Consumer magazine	Monthly

Source: Facts Figures Future (2011)

The Swedish television has different programmes that are focussed on travel. The most common TV channels in Sweden are SVT and TV4, which generally broadcast one or two travel programmes throughout the year. Examples are “Resebyrå” (SVT - <http://svt.se/2.150424/resebyran>) and “När & Fjärran” (TV4 - <http://www.tv4.se>). Other TV-programmes sometimes also include travel themes. An example is “Go kväll” (http://svt.se/2.154626/kol_start) a programme that is broadcasted every evening and once a week includes a travel report. The names of travel programmes tend to change from time to time. For tourism companies in DCs a television broadcast about their destination would be a great change to promote their destination and tourism products and expand their exposure among potential Swedish trade partners.

3.6 Familiarisation trips

Another way for tourism providers and inbound tour operators in developing countries to find potential Swedish trade partners is to invite Swedish tour operators, travel agents or journalist on a trip to their destination so that they can become familiar with what the destination has to offer. These trips are called ‘fam trips’ and are usually the joint effort of the private sector, national tourism boards, tour operators and airlines. After the trip, tour operators might consider setting up a travel programme to the visited destination and will most likely need local partners. Journalists could write an article about the trip which increases the exposure of the destination and its local tourism companies.

3.7 Approaching potential Swedish partners

Each tour operator and travel agency in Sweden is unique, with their own destinations, types of holidays and customers. To increase the chance of finding a suitable trade partner, tourism providers and inbound tour operators in developing countries

are advised to focus on Swedish tour operators and travel agencies active in the same niche market. Some interesting potential trade partners in Swedish niche outbound tourism markets can be found in Chapter 4 ‘Swedish niche outbound tourism markets’.

After having selected a list of interesting potential trade partners in the Swedish tourism market, the next step is to approach them. Personal contact is highly advisable. This is easiest during a travel trade event. Other options to meet potential partners in person are making a sales tour through Sweden or organising familiarisation trips. It is also possible to contact potential trade partners by telephone, email or via social media, such as Facebook, Twitter or Linked-In, but a good sales talk is vital.

The first contact is very important, so you have to be well prepared and leave a good impression. You should at the very least take a look at the website of the potential trade partner before approaching him. Some critical success factors for a first approach are:

- Use photos and videos to illustrate your tourism product.
- Focus on your Unique Selling Point (USP), why is your product so special?
- Be clear about prices and commissions.
- Use facts, for example market share figures.
- Study your competition.
- Use references from current partners and customer testimonials to create reliability. If you have certifications, have won an award or are a member of a trade association, mention this as well.
- Use formal and clear language.
- If potential partners come back to you with questions or doubts, answer them as soon as possible.
- Be aware of cultural differences between Sweden and your country. Swedes are, for example, very punctual and organised.

Useful sources for further research

- AUMA - <http://www.auma.de> - database of worldwide trade events, including travel and tourism.
- Centre for the Promotion of Imports from developing countries (CBI) - <http://www.cbi.eu> - information about how to plan, prepare and participate at trade events.
- E-kit of the Australia Tourism Data warehouse - http://www.atdw.com.au/tourism_e_kit.asp - downloadable tutorials in writing and video about online opportunities for tourism companies.
- International Tourism Trade Fairs Association - <http://www.ittfa.org> - information about travel events.
- Kwintessential - <http://www.kwintessential.co.uk/etiquette/doing-business-sweden.html> - information about how to do business in Sweden.
- Swedish Chambers - <http://www.swedishchambers.se> - offers contacts, knowledge and capacity to exporters in developing countries. Refer to their guide 'Exporting to Sweden' for more information about the Swedish business culture.

4 Swedish niche outbound tourism markets

*“Demand for niche products such as adventure, golf, safari, spa, culture, religion and cruise tourism is increasing in Sweden”
(Mr Curt Landin, tourism industry expert)*

This chapter will provide information about important Swedish niche tourism market trends that have been identified by industry experts: adventure tourism, cruise tourism, cultural tourism, eco/sustainable tourism and sun and beach tourism. For each of these niche markets market characteristics, potential partners and prices will be discussed.

4.1 Adventure tourism

Market characteristics

Adventure tourism is one of the fastest growing tourism segments in Sweden. Nowadays, Swedish travellers are looking for more adventurous, active holidays that provide them with new, unique experiences. They want to enrich themselves during their holiday instead of just escaping from daily life.

Swedes are quite active people. In particular, walking, hiking and cycling are popular activities. Swedish research institute Frilufts Forskning conducts research about outdoor recreation activities by Swedes. According to their latest research, 92% of Swedes walk for pleasure or physical activity at least six times a year, 88% hike in the forest/nature at least six times a year and 73% cycle on roads at least six times a year.

Other outdoor activities in which Swedes participate at least once a year are:

- Fishing (39%)
- Skiing (39%)
- Bird-watching (38%)
- Motor-boating (36%)
- Running in nature (35%)

- Hiking on a trail outside a mountain region (30%)
- Nordic walking (25%)
- Mountain hiking (16%)
- Playing golf (15%)
- Mountain biking (13%)
- Kayaking/canoeing (12%)
- Diving/snorkelling (11%)
- Sailing/surfing (9%)
- Hunting (9%)
- Horseback riding (7%)
- Rock climbing (7%)

According to a survey of Swedish tour operator Ving, around 10% of Swedes are interested in adventurous holidays and 9% in active holidays that include activities such as hiking, cycling and horseback riding. These figures together with the fact that Swedes are active people and are looking for more adventurous holidays makes the Swedish outbound adventure tourism market a promising market for tourism companies in developing countries.

There are two important target groups in Sweden for adventure tourism companies in developing countries:

- Young people. Among young Swedes travelling is increasing, particularly after finishing high school or university. They are particularly interested in sports-related adventurous activities, backpacking and overland tours.
- Senior age group. In general, this group is very healthy and has the time and money to travel. They are especially interested in adventure tourism that includes light physical activity, culture, history and meeting local people.

Trends

An increased demand has been noticed for active, sports-related adventure tourism, such as climbing, hiking and diving. Another trend within adventure tourism is an increased interest in meeting locals. Swedes would like to experience the culture of local people and participate in activities with them.

India, Nepal, Thailand and Latin American countries are particularly popular adventure tourism destinations for Swedes. A survey among Swedish adventure travellers in 2009 revealed the following most popular adventure destinations: Machu Picchu in Peru (37%), Angkor Wat in Cambodia (16%), Tah Mahal in India (12%), Hong Kong, Beijing and the Chinese Wall in China (7.5%) and a trip Buenos Aires/Rio de Janeiro in combination with the Iguazu waterfalls (6.0%).

Potential partners

Adventure tourism companies in developing countries seeking to enter the Swedish outbound tourism market are advised to target Swedish niche tour operators and travel agencies specialised in adventure tourism. Some interesting players on the Swedish outbound adventure tourism market are:

- Adventure Lovers - <http://www.adventurelovers.se> - specialised in trekking trips and mountain climbing expeditions.
- African Adventure - <http://www.africanadventure.se> - customised adventure trips to Africa, specialised in safari and hunting holidays.
- Avenyrresor - <http://www.avenyrresor.se> - worldwide adventure tour operator with a sustainable travel program.
- Carpe Adventures - <http://www.carpeadventures.se> - worldwide adventure tour operator.

- Dyk & Resespecialisten - <http://www.dykresespecialisten.se> - specialised in diving trips around the world.
- Diving Travel - <http://www.divingtravel.se> - tour operator specialised in diving holidays, mainly to developing countries.
- Kenzan - <http://kenzantours.se> - small-scale adventure/safari tour operator to Africa, the Indian Ocean, South America, Asia and the Pacific.
- Kilroy Travels - <http://travels.kilroy.se> - worldwide adventure tour operator that targets younger people and students.
- P&H Travel - <http://www.phtravel.se> - specialised in diving trips.
- STA Travel - <http://www.statravel.se> - worldwide adventure tours.
- Swed-Asia Travels - <http://www.swedasia.com> - specialised in adventure holidays to Asia.
- Trackers - <http://www.trackers.se> - worldwide tailor-made adventure and 'explore' trips.
- Världens Resor - <http://www.varldensresor.se> - adventure tour operator.
- Wiresor - <http://www.wiresor.se> - specialised in hiking holidays.

For more information about how to find potential Swedish trade partners, refer to Chapter 3.

Prices

To give an indication of the prices of adventure holiday packages to developing countries offered by Swedish tour operators, Table 4.1 presents some examples of consumer prices for different types of adventure holidays. These prices are only an indication, as prices can fluctuate during the year, per tour operator and per destination.

Table 4.1 Consumer prices of adventure holiday packages to developing countries offered by Swedish tour operators, 2011, in €, price on 21 April 2011

Destination	Activities	Length	Price from * (€)	Tour operator
Philippines	Diving	15 days/14 nights	1,714	http://www.phtravel.se
Peru	Trekking	17 days/14 nights	2,169, excl. Flights	http://www.adventurelovers.se
Tanzania	Safari	14 days/13 nights	2,984	http://kenzantours.se
Sri Lanka	Cycling	15 days/14 nights	1,266, excl. Flights	http://www.carpeadventures.se
Colombia & Ecuador	Hiking	21 days/20 nights	3,778	http://www.varldensresor.se

* Used exchange rate is: 1 EUR = 8.95 SEK

Source: Facts Figures Future (2011)

Useful sources for further research

- Adventure Travel Trade Association - <http://www.adventuretravel.biz> - global association for the adventure tourism industry. Publishes news and research about the adventure tourism market and has a member database, including Swedish adventure tour operators and travel agencies.
- Dyk - <http://dyk.net> - monthly Scandinavian dive magazine. Information about diving travel around the world and a diving guide including a list of Swedish diving tour operators.
- Dykarna.nu - <http://www.dykarna.nu> - Scandinavian diving community with a forum, photo sharing, information about diving destinations and more.
- Friluftsforskning - <http://www.friluftsforskning.se> - Swedish reports about outdoor recreation and nature-based tourism.
- Vildmarksmässan - <http://www.vildmarksmassan.se> - outdoor and adventure event, including adventure tourism. This event is held annually, in March, in Stockholm.

4.2 Cruise tourism

European market characteristics

Cruise tourism is booming in Europe. In 2009, Europe was the second largest source market for cruise passengers (35% market share), behind North America (60%). Over the last five years, Europe has been gaining market share in terms of cruise passengers from 22% in 2005 to 35% in 2009.

Despite the global recession, 4.9 million Europeans took a cruise holiday in 2009, an increase of 12% compared to 2008. Most cruise holidays taken by

Europeans stay within Europe. In 2009, about 57% of European cruise passengers took a cruise to the Mediterranean/Atlantic Islands, 18% went on a cruise to Northern Europe and the remaining 25% took a cruise holiday to the Caribbean or other regions outside Europe. However, cruises to the Caribbean or other regions outside Europe showed a growth of 19% between 2008 and 2009, whereas cruises to the Mediterranean/Atlantic Islands only grew by 7%. Table 4.2 gives an overview of the number of cruise passengers from the most important European countries between 2005 and 2010.

Table 4.2 Number of cruise passengers per country, most important European countries, 2005-2010, in thousands, growth 2005-2010 in %

	2005	2006	2007	2008	2009	2010	Growth 2005-2010
Total Europe	3,126	3,409	4,004	4,422	4,944	5,451	74%
UK	1,071	1,204	1,335	1,477	1,533	1,621	51%
Germany	639	705	763	907	1,027	1,219	91%
Italy	514	517	640	682	799	889	73%
Spain	379	391	518	497	587	645	70%
France	233	242	280	310	347	387	66%
Scandinavia	42	62	94	123	173	168	300%
Benelux	42	64	82	92	110	126	200%
Austria	39	44	52	59	80	93	138%
Switzerland	51	56	64	65	76	91	78%
Other	117	123	175	211	213	212	81%

Source: European Cruise Council (2011)

The UK was the largest European source market for cruise passengers in 2010, representing almost 30% of European cruise passengers. The UK was followed by Germany (22%) and Italy (16%). The Scandinavian countries together (including Denmark, Norway, Sweden and Finland) ranked sixth in terms of cruise passengers (3.1% market share), representing 168 thousand cruise passengers in 2010. Moreover, Scandinavian countries showed the highest growth in cruise passengers between 2005 and 2010 (300%).

Swedish market characteristics

Swedes are increasingly interested in cruising. In 2009, 72 thousand Swedes went on a cruise holiday which represented 1.3% of the total number of European cruise passengers. This number is expected to increase by 30% in 2011 as a result of decreasing prices of cruise holidays. The Mediterranean/Atlantic Islands is the most popular cruise destination for Swedes, with a market share of approximately 54%. About 16% of Swedes go on a cruise holiday to Northern Europe and 30% go to the Caribbean or other regions outside Europe, which is 5% more than the European average of 25%.

According to a survey of Swedish tour operator Ving, 7% of Swedes are interested in cruise holidays. Another survey revealed that 45% of Swedes consider a cruise when planning their holiday and another 67% can imagine exchanging their skiing holidays for a cruise holiday.

Destination selection

The increased demand for cruise holidays together with the 30% market share for cruises to regions outside Europe makes the Swedish outbound cruise tourism market an interesting market for tourism companies in developing countries. However, cruise line operators look at some important factors before they select a destination:

- Revenue potential. There must be sufficient interest in the destination and costs at the destination (port charges, provisioning) must not be too high.
- Attractiveness. A destination must be attractive, unique, iconic and/or worthwhile for cruise passengers.
- Safety. A destination must be able to accommodate cruise ships and their passengers safely.
- Access. The destination port must be in a position to receive cruise ships (e.g. the wharf must be of sufficient length, the water has to be of sufficient depth, the cruise ship has to be able to turn around). Furthermore, the destination must provide a constant level of access, regardless of sea conditions.
- Local infrastructure, facilities and capacity. A destination must have good transport facilities, sufficient accommodation, restaurants and tour guides to cater to the needs of cruise passengers, a wide range of shore excursions, good shopping facilities and preferably be located near to an international airport.
- Local service. A destination must dispose of friendly, informative guides and hospitable locals.

Cruise companies generally work with only a few inbound tour operators in each cruise region. They rely on their inbound tour operators to make arrangements for tours/activities at the port of call. Inbound tour operators have a great influence on the success of a cruise destination. It is therefore very important for destinations to form strong alliances with the inbound tour operators who work or want to work with cruise line operators.

Trends

Theme cruises

Interest in theme cruises is increasing in Sweden. Some examples are senior cruises, health cruises, culture cruises and food and wine cruises.

Fly & cruise

Cruise itineraries are becoming more globalised. Instead of taking a cruise with departure from a Scandinavian port, more and more Swedes are interested in taking a fly & cruise. This means that they first fly to a destination, for example, Brazil, take a cruise trip in that region and then fly back to Sweden. The fly & cruise trend increases the potential for cruise tourism in developing countries.

Lower prices for cruise holidays

A few years ago it was very expensive to go on a cruise holiday and cruise holidays were seen as a luxury mainly taken by senior people and people with higher incomes. However, due to the global crisis, the cruise industry was forced to lower its prices and this allowed people who normally could not afford a cruise holiday to now book such a holiday. Nowadays, the cruise industry does not only focus on seniors and people with higher incomes, but also on younger people and families. In Sweden, families with children in particular are discovering the cruise market.

Potential partners

One of the largest cruise line operators in Sweden is Stena Line (<http://www.stenaline.com>), but they only operate in Northern Europe. There are no registered Swedish cruise lines operating in developing countries. However, there are some specialised cruise tour operators and travel agencies in Sweden that represent cruise line operators and sell cruise holidays. They can talk to the cruise line operators with whom they are working and influence them in their destination selection process. Tourism companies in developing countries seeking to enter the Swedish cruise tourism market are therefore advised to target Swedish niche tour operators and travel agencies specialised in cruises. Some interesting players on the Swedish cruise tourism market are:

- Cruise Market - <http://www.cruisemarket.se> - Swedish travel agency specialised in cruise holidays.
- Cruise Selection - <http://www.cruiseselection.se> - cruise specialist to the Mediterranean and Caribbean.
- Globetrotter - <http://www.globetrotter.se> - worldwide cruises including developing countries, part of Thomas Cook.
- Grand Tours - <http://www.grandtours.se> - sea and river cruises and spa and health holidays.
- Hummingbird Lifestyle - <http://www.hummingbirdtravel.se> - cruise specialist, especially to the Caribbean.
- Kryssnings Specialisten - <http://www.kryssningsspecialisten.se> - cruise specialist.
- Polarquest - <http://www.polarquest.se> - organises cruise expeditions to the Arctic and Antarctica with its own vessels.
- Travelbeyond - <http://www.travelbeyond.se> - tour operator that also sells cruise holidays.

- Tour Pacific - <http://www.tourpacific.se> - cruise specialist to the Pacific.
- Wondercruises - <http://www.wondercruises.se> - worldwide cruise specialist, part of TUI Travel.

For more information about how to find potential Swedish trade partners, refer to Chapter 3.

Prices

The prices of cruise holidays have gone down significantly. To give an indication of the prices of cruise holiday packages to developing countries offered by Swedish tour operators, Table 4.3 presents some examples of consumer prices for different cruise holidays. These prices are only an indication, as prices can fluctuate during the year, per tour operator and per destination.

Table 4.3 Consumer prices of cruise holiday packages to developing countries offered by Swedish tour operators, 2011, in €, price on 21 April 2011

Destination	Type of cruise	Length	Price from * (€)	Tour operator
West Africa	Fly & cruise	18 days/17 nights	1,216, excl. flights	http://www.globetrotter.se
Middle East	Fly & cruise	9 days/8 nights	1,901	http://www.grandtours.se
South America	Fly & cruise	16 days/15 nights	1,474, excl. flights	http://www.hummingbirdtravel.se
Argentina & Antarctica	Fly & cruise	22 days/21 nights	8,335, excl. flights	http://www.polarquest.se
South East Asia	Fly & cruise	6 days/5 nights	440, excl. flights	http://www.travelbeyond.se

* Used exchange rate is: 1 EUR = 8.95 SEK

Source: Facts Figures Future (2011)

Useful sources for further research

- Cruise Business Online - <http://www.cruisebusiness.com> - news articles about the global cruise industry, including Sweden.
- Cruise Europe - <http://www.cruiseeurope.com> - organisation that promotes cruise tourism in Northern and Western Europe. Has a member database with European cruise operators.
- Cruise Industry News - <http://www.cruiseindustrynews.com> - news about the global cruise industry, including Sweden.
- Cruise Industry Wire - <http://www.cruiseindustrywire.com> - news portal for the global cruise industry, including news about the Scandinavian/Swedish cruise market.
- Cruise Lines International Association - <http://www.cruising.org> - global cruise association.
- European Cruise Council - <http://www.europeancruisecouncil.com> - represents the leading cruise operators in Europe. Publishes reports and news articles about the cruise market in European countries and has a member database of European cruise line operators.
- Kryssningnet.net - <http://www.kryssning.net> - Swedish portal with information about the cruise industry.
- Seatrade Europe - <http://www.seatrade-europe.com> - European trade event for the cruise industry. This event is held biannually, in September, in Hamburg, Germany.
- Tourism New Zealand - <http://www.tourismnewzealand.com> - publishes interesting documents about working with the cruise sector.

4.3 Cultural tourism

Market characteristics

Demand for outbound cultural trips by Swedes is increasing, as Swedes are increasingly interested in discovering new cultures and activities and like to explore unknown regions. The Swedish outbound cultural tourism market is therefore a promising market for cultural tourism companies in developing countries. In particular, Swedish people in the 50+ age category are interested in outbound cultural holidays and generally have more time and money to travel than other groups.

According to a survey of Swedish tour operator Ving, 23% of Swedes are interested in a holiday with a lot of excursions, 21% are interested in

combination holidays that combine sunbathing with activities and 19% are interested in city breaks. Another survey of the European Commission revealed that more than 48% of Swedes say that local culture, lifestyle and traditions are their main expectations from a holiday to a developing country. This is more than the EU average of 33%. Furthermore, 7.9% of Swedes say culture and/or religion is the major motivation for their main holiday, which is 2.0% more than the European average.

Trends

Meeting local people

There is an increased interest from Swedes in cultural trips that include contact with local

people. Swedish travellers are no longer satisfied with only observing cultural heritage sites and events; they also want to have interaction with local cultures, for example, by participating in handicraft workshops with them or cooking together.

City trips

Swedes are taking more outbound cultural city trips. Due to a lack of time, most city trips are no longer than 4 days and destinations are within Europe. However, as a result of the favourable exchange rate of the Swedish Crown against the US Dollar, long haul city trips to, for example, New York, Bangkok and Miami are also on the rise.

Potential partners

Cultural tourism companies in developing countries seeking to enter the Swedish outbound tourism market are advised to target Swedish niche tour operators and travel agencies specialised in cultural tourism. Some interesting players on the Swedish outbound cultural tourism market are:

- Explore Tours - <http://www.exploretours.se> - worldwide cultural tour operator with a focus on meeting local people and fair and sustainable travel.
- Favorit Resor - <http://www.favoritresor.se> - specialised in cultural trips like music, art, architecture, gardens and wine and gourmet within Europe and to the Middle East.
- Gränslösa Resor - <http://www.granslosaresor.se> - specialised in culture, nature and sustainable trips to Asia and Central America with a focus on meeting local people.
- Iventus Travel - <http://www.iventustravel.se> - tour operator specialised in art and culture travel to Eastern Europe, the Middle East and Central Asia.

- Jambo Tours - <http://www.jambotours.se> - 'green' tour operator specialised in cultural, nature and safari holidays.
- King Tours - <http://www.kingtours.se> - tour operator specialised in cultural trips to the Middle East.
- Lotus Travel - <http://www.lotustravel.se> - tour operator specialised in cultural trips to Asia.
- Tagalong - <http://www.tagalong.se> - small-scale tour operator specialised in cultural holidays.
- Tånga Tours - <http://tangatours.se> - specialised in cultural holidays to the Caucasus region and the Middle East.
- Tema Resor - <http://www.temaresor.se> - specialised in cultural theme holidays, part of TUI Travel.
- Thabela Travel - <http://www.thabelatravel.com> - cultural round trips to Africa, South America and Asia.
- Travelbeyond - <http://www.travelbeyond.se> - tour operator that organises cultural 'experience' and gourmet trips.
- Wiresor - <http://www.wiresor.se> - specialised in cultural theme holidays such as wine and gourmet.

For more information about how to find potential Swedish trade partners, refer to Chapter 3.

Prices

To give an indication of the prices of cultural holiday packages to developing countries offered by Swedish tour operators, Table 4.4 presents some examples of consumer prices for different types of cultural holidays. These prices are only an indication, as prices can fluctuate during the year, per tour operator and per destination.

Table 4.4 Consumer prices of cultural holiday packages to developing countries offered by Swedish tour operators, 2011, in €, price on 21 April 2011

Destination	Activities	Length	Price from * (€)	Tour operator
Cambodia & Vietnam	Cultural	17 days/16 nights	3,179	http://www.exploretours.se
Guatemala & Costa Rica	Cultural	16 days/15 nights	4,455	http://www.thabelatravel.com
India & Nepal	Cultural	14 days/13 nights	2,961	http://www.temaresor.se
Tanzania	Cultural	8 days/7 nights	3,743	http://www.tagalong.se
Tadzhikistan, Uzbekistan, Turkmenistan & Kazakhstan	Cultural	19 days/18 nights	3,737	http://www.iventustravel.se

* Used exchange rate is: 1 EUR = 8.95 SEK

Source: Facts Figures Future (2011)

Useful sources for further research

- European Cultural Tourism Network - <http://www.ectn.eu.com> - network of European cultural tourism professionals, including Sweden.
- RES - <http://res.se> - bimonthly Swedish consumer travel magazine with a focus on cultural city trips.
- Swedish Ministry of Culture - <http://www.regeringen.se> - go to the English version, select 'Government and ministries' and click on 'Ministry of culture' for news and contact information.

4.4 ECO / Sustainable tourism

Market characteristics

Eco/sustainable tourism is a popular topic of discussion in Sweden. The most important travel trade event in Scandinavia, TUR, dedicated its last two editions to 'Fair Travel, Sustainability and CSR in the travel industry'. Also non-profit organisations such as Schyst Resande and the Swedish Fair Trade Center are striving to create awareness of eco/sustainable tourism among Swedes. As a result, interest in eco/sustainable tourism is increasing which offers interesting opportunities for eco/sustainable tourism companies in developing countries.

More and more Swedes are concerned with the impact of their travel on nature and local people when they go on holiday. They want to preserve the environment as much as possible and improve the well-being of the local people. A survey conducted in 2009 revealed that social considerations were the most important factor for 31% of Swedes when choosing a holiday destination, compared to an EU average of 10%.

Trends

Sustainable measures

Most Swedish tour operators have already adapted to the trend of eco/sustainable tourism in some way. They have, for example, implemented eco/sustainable measures in their operating guidelines and have set up sustainable travel programs. Sweden is one of the world's first countries that has created a quality label for eco tourism, called 'Naturens Bästa'. Although this label is only valid for tourism within Sweden, it does give an indication of the importance of eco/sustainable tourism for Swedes.

Volunteer travel

Demand for volunteer travel is increasing in Sweden, especially among younger people. This has resulted in a new niche market of tour operators specialised in volunteer holidays. Sweden is among the top 5 countries in the world when it comes to volunteer travel.

Potential partners

Eco/sustainable tourism companies in developing countries seeking to enter the Swedish outbound tourism market are advised to target Swedish niche

tour operators and travel agencies specialised in eco/sustainable tourism. Some interesting players on the Swedish outbound eco/sustainable tourism market are:

- Amzungo - <http://www.amzungo.com> - organises volunteer trips.
- Äventyrsresor - <http://www.aventyrsresor.se> - worldwide sustainable adventure tour operator.
- Ecowatch - <http://www.ecowatch.se> - eco tourism tour operator specialised in nature and wildlife tours.
- Good Travel - <http://www.goodtravel.se> - tour operator specialised in learning and volunteering trips.
- Gränslösa Resor - <http://www.granslosaresor.se> - specialised in sustainable, nature and culture trips to Asia and Central America with a focus on meeting local people.
- Jambo Tours - <http://www.jambotours.se> - 'green' tour operator specialised in nature, safari and cultural holidays.
- Läs och Res - <http://www.lasochres.se> - sustainable tours to countries with non-western cultures.
- Naturresor - <http://www.naturresor.com> - specialised in worldwide ecotourism.
- Nordic Latin Travel - <http://nordiclatintravel.com> - specialised in eco/sustainable travel to Latin America.
- Planet Wildlife - <http://www.planetwildlife.com> - sustainable tour operator specialised in wildlife holidays.
- Travelbeyond - <http://www.travelbeyond.se> - tour operator that also organises eco trips.
- Världens Resor - <http://www.varldensresor.se> - organises eco/nature trips.
- Volontärresor - <http://www.volontarresor.se> - specialised in volunteer trips.

For more information about how to find potential Swedish trade partners, refer to Chapter 3.

Prices

To give an indication of prices of eco/sustainable holiday packages to developing countries offered by Swedish tour operators, Table 4.5 presents some examples of consumer prices for different types of eco/sustainable holidays. These prices are only an indication, as prices can fluctuate during the year, per tour operator and per destination.

Table 4.5 Consumer prices of eco/sustainable holiday packages to developing countries offered by Swedish tour operators, 2011, in €, price on 21 April 2011

Destination	Activities	Length	Price from *(€)	Tour operator
Ecuador	Nature related group travel	15 days/ 14 nights	2,940, excl. flights	http://www.planetwildlife.com
Uganda	Volunteer work	4 weeks	1,106 full board, excl. flights	http://www.volontarresor.se
Thailand, Cambodia, Vietnam & Laos	Nature related group travel	30 days/ 29 nights	3,855	http://www.varldensresor.se
Guatemala, Belize, Honduras & Nicaragua	Mix of cultural, nature and adventurous group travel	24 days/ 23 nights	1,609, excl. flights and admission fees	http://www.lasochres.se
Zimbabwe	Active nature group travel	13 days/ 12 nights	5,028	http://www.naturresor.com

* Used exchange rate is: 1 EUR = 8.95 SEK

Source: Facts Figures Future (2011)

Useful sources for further research

- Fair Trade Center - <http://www.fairtradecenter.se> - promotes fair trade with developing countries, including travel.
- Hållbar turism - <http://www.hallbarturism.com> - Swedish blog about sustainable/ethical tourism.
- International Ecotourism Society - <http://www.ecotourism.org> - eco/sustainable tourism providers from developing countries can become a member. Members have access to a large network of ecotourism related companies, also from Sweden.
- Naturens Bästa - <http://www.naturensbasta.se> - national quality label for ecotourism within Sweden.
- Schyst Resande - <http://www.schystresande.se> - stimulates sustainable tourism among Swedes.
- Swedish Ecotourism Society - <http://www.ekoturism.org> - stimulates eco tourism within Sweden, but also abroad. Has a member database, including Swedish eco tourism tour operators and travel agencies.
- Vildmarksmässan - <http://www.vildmarksmassan.se> - outdoor and adventure event, including adventure tourism. This event is held annually, in March, in Stockholm.

4.5 Sun and beach tourism

Market characteristics

Sun and beach tourism is the most important outbound tourism segment in Sweden and offers great potential for tourism companies in warm and sunny developing countries. Almost all Swedish tour operators and travel agencies offer sun and beach holiday packages and these kinds of holidays are taken by almost all age categories in Sweden.

Industry experts estimate that sun and beach holidays represent a market share of 70-80% of the total Swedish outbound tourism market. One of the main reasons for this large share is that many Swedes want to escape from the cold and harsh Swedish winter by travelling to warm and sunny destinations. In winter, Thailand, Egypt and the Canary Islands are very popular sun and beach holiday destinations for Swedes. In summer, Spain, Turkey and Greece are favoured.

In actual fact, in their daily life, Swedes love (sun) bathing. Swedish research institute Friluftsforskning conducts research about outdoor recreation activities by Swedes. According to their latest research, more than 79% of Swedes sunbathe in their garden at least six times a year, 74% bathe in a lake or sea at least six times a year and 38% bathe in a pool at least six times a year.

According to a survey of Swedish tour operator Ving, more than 73% of Swedes are interested in a sun and beach holiday and 21% are interested in combination holidays that combine sunbathing with activities. Another survey of the European Commission revealed that more than 26% of Swedes have sun and beach as the major motivation for their main holiday trip, which is 7% more than the EU average.

Trends

An important trend in the Swedish outbound sun and beach tourism market is 'experiencing'. Swedish travellers still want to sunbathe or swim during their holiday, but in combination with 'experiencing'. They want to combine sun and beach with other activities like meeting local people, hiking, a safari, a cultural tour, meditation, or a visit to a big city.

Potential partners

Sun and beach tourism companies in developing countries seeking to enter the Swedish outbound tourism market are advised to target Swedish tour operators and travel agencies specialised in sun and beach tourism. Many sun and beach holiday packages are relatively standard and offered by major charter tour operators, but there are some smaller interesting players as well that focus on a

specific region or offer more tailor-made sun and beach trips. Interesting players on the Swedish sun and beach tourism market are:

- Airtours - <http://www.airtours.se> - tour operator specialised in sun and beach holidays, currently only to Mediterranean countries.
- Apollo Resor - <http://www.apollo.se> - large charter tour operator of worldwide sun and beach holidays.
- Deluxe Vacations - <http://www.deluxe.se> - specialised in sun and beach holidays to the Caribbean.
- Detur - <http://www.detur.se> - tour operator specialised in worldwide sun and beach holidays to Turkey, Tunisia and Egypt, part of Detur International.
- Escape Travel - <http://www.escapetravel.se> - sun and beach holidays to the Caribbean and the Indian Ocean.
- Fritidsresor - <http://www.fritidsresor.se> - large charter tour operator that offers worldwide sun and beach holidays.
- Globetrotter - <http://www.globetrotter.se> - worldwide sun and beach holidays, part of Thomas Cook.
- Jambo Tours - <http://www.jambotours.se> - 'green' tour operator that also offers sun and beach holidays.
- Oden Resor - <http://www.odenresor.se> - travel agency that offers many sun and beach holiday packages.
- Retravel - <http://www.retravel.se> - sun and beach holidays, mainly to Africa.
- Solresor - <http://www.solresor.se> - tour operator of worldwide sun and beach holidays.
- Tour Africa - <http://www.tourafrica.se> - organises trips to Africa, including sun and beach holidays.
- Tour Pacific - <http://www.tourpacific.se> - specialised in sun and beach holidays to the South Pacific.
- Travelbeyond - <http://www.travelbeyond.se> - tour operator that also organises sun and beach holidays.
- Ving Sverige - <http://www.ving.se> - large charter tour operator that offers sun and beach holidays.

For more information about how to find potential Swedish trade partners, refer to Chapter 3.

Prices

To give an indication of the prices of sun and beach holiday packages to developing countries offered by Swedish tour operators, Table 4.6 presents some examples of consumer prices for different types of sun and beach holidays. These prices are only an indication, as prices can fluctuate during the year, per tour operator and per destination.

Table 4.6 Consumer prices of sun and beach holiday packages to developing countries offered by Swedish tour operators, 2011, in €, price on 21 April 2011

Destination	Activities	Length	Price from *(€)	Tour operator
Tunisia	Sun and beach	8 days/7 nights	1,329, incl. flights for two people	http://www.detur.se
Kenya	Sun and beach	8 days/7 nights	1,218	http://www.apollo.se
Vietnam	Sun and beach	12 days/11 nights	1,907	http://www.odenresor.se
Mexico	Sun and beach	8 days/7 nights	2,827, all inclusive	http://www.ving.se
Singapore & Bali	Sun and beach	13 days/12 nights	1,755	http://www.jambotours.se

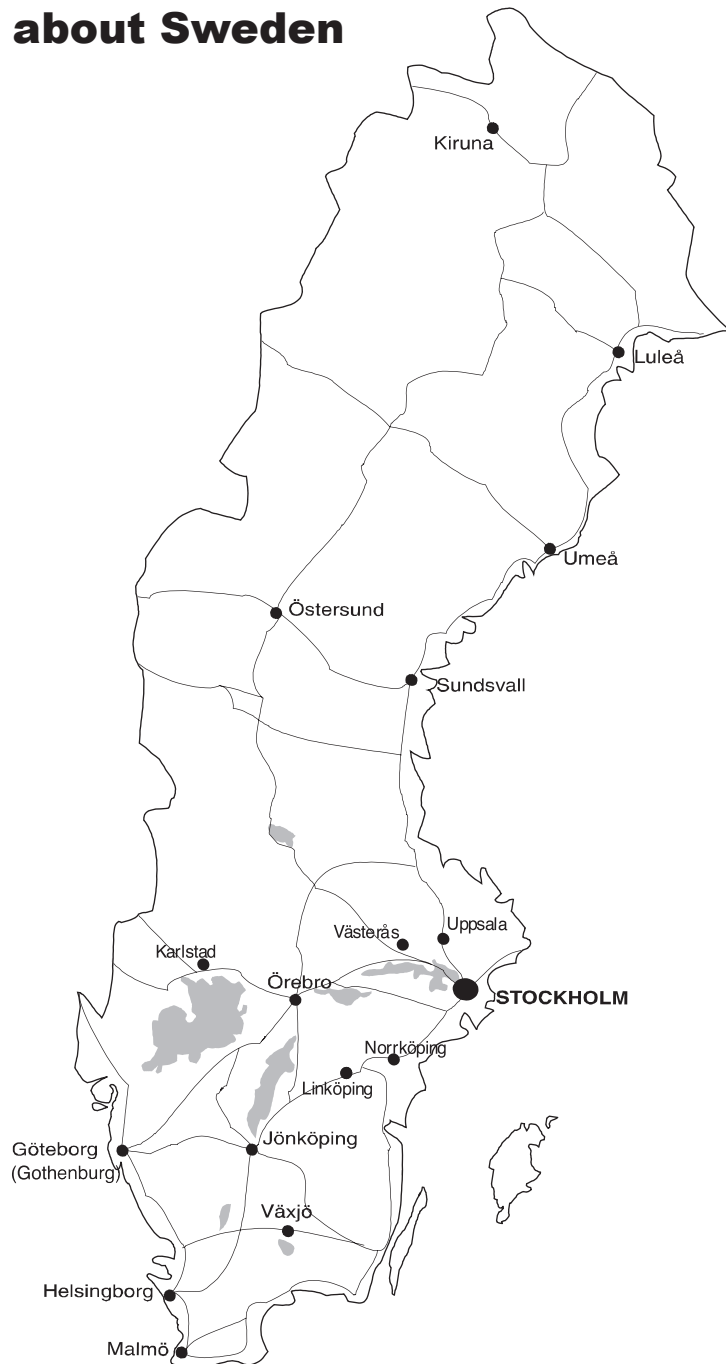
* Used exchange rate is: 1 EUR = 8.95 SEK

Source: Facts Figures Future (2011)

Useful sources for further research

- Resia - <http://www.resia.se> - press releases and surveys about the Swedish tourism industry, including sun and beach tourism.
- Ticket - www.ticket.se - press releases and surveys about the Swedish tourism industry, including sun and beach tourism.
- Vagabond - <http://www.vagabond.se> - press releases, articles and surveys about the Swedish tourism, including sun and beach tourism.
- Ving Sverige - <http://www.ving.se> - press releases and surveys about sun and beach tourism.

Facts about Sweden



Area: 449,964 sq.km
Population: 9.4 million

Capital: Stockholm.
Stockholm city: 847.100 inh.
Greater Stockholm: 2 mil. inh.

Business language:
Swedish, English

Religion:
Lutheran

Largest cities:
Stockholm city 847.100 inh.
Gothenburg 513.800 inh.
Malmö 298.900 inh.
Uppsala 197.800 inh.
Linköping 146.400 inh.
Västerås 137.200 inh.
Örebro 135.500 inh.
Norrköping 130.100 inh.
Helsingborg 129.200 inh.
Jönköping 127.400 inh.

Form of government:
Constitutional monarchy,
parliamentary democracy

Some distances:
Stockholm-Malmö 640 km
Stockholm-Gothenburg 490 km
Stockholm-Sundsvall 400 km
Stockholm-Kiruna 1310 km

Currency:
1 krona (SEK) = 100 öre

The European Union

- Austria
- Belgium
- Bulgaria
- Cyprus
- Czech Rep.
- Denmark
- Estonia
- Finland
- France
- Germany
- Great Britain
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxemburg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovak Rep.
- Slovenia
- Spain
- Sweden

The EES/EEA area
EU-countries, Iceland,
Liechtenstein and Norway

EFTA
Iceland, Liechtenstein,
Norway and Switzerland





Swedish Chambers

Swedish Chambers of Commerce
Trade Promotion
P.O. Box 16050, SE-103 21 Stockholm, Sweden
Visit: Västra Trädgårdsgatan 9, Stockholm
Phone: +46-8-555 100 00
Fax: +48-8-566 316 30
Internet: www.swedishchambers.se
E-mail: info@chambertrade.com

Market Report

Focus on the EU and Swedish Market

Outbound Tourism
May 2011