

Market insight



Sweden

Analysis of tourist profiles, traveler flows, transportation and target groups

Feb 2019

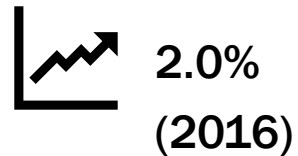


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PROMOTE ICELAND

Market profile

Economy

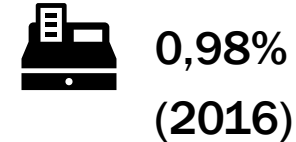
Real GDP Growth



GDP per capita



Consumer price inflation



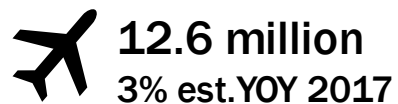
Population



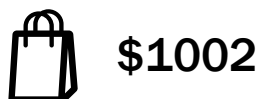
Travel & Tourism

GLOBAL

Total Outbound Trips



Average spend per trip



ICELAND

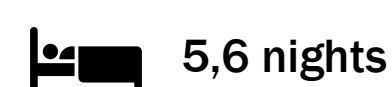
Swedish visitors to Iceland 2018



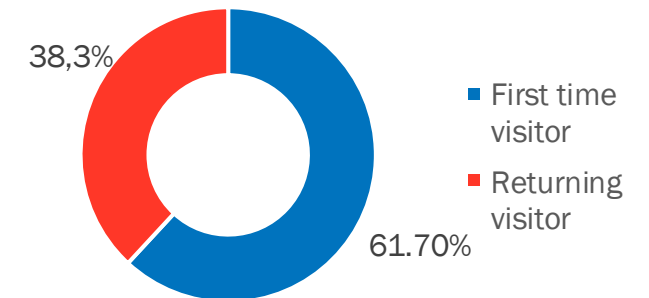
Share of guest nights



Average length of stay



Likelihood of return visit



Air Transportation

All year direct flights


- Stockholm

Seasonal direct flights

Airlines



Air capacity to Iceland 2018

 302 thousand seats
-14,7% YOY (2017-2018)



Seasonality

Swedish travelers are important for Iceland. Visitors have a similar pattern of arrivals as total arrivals. Flight availability increases during the summer months.

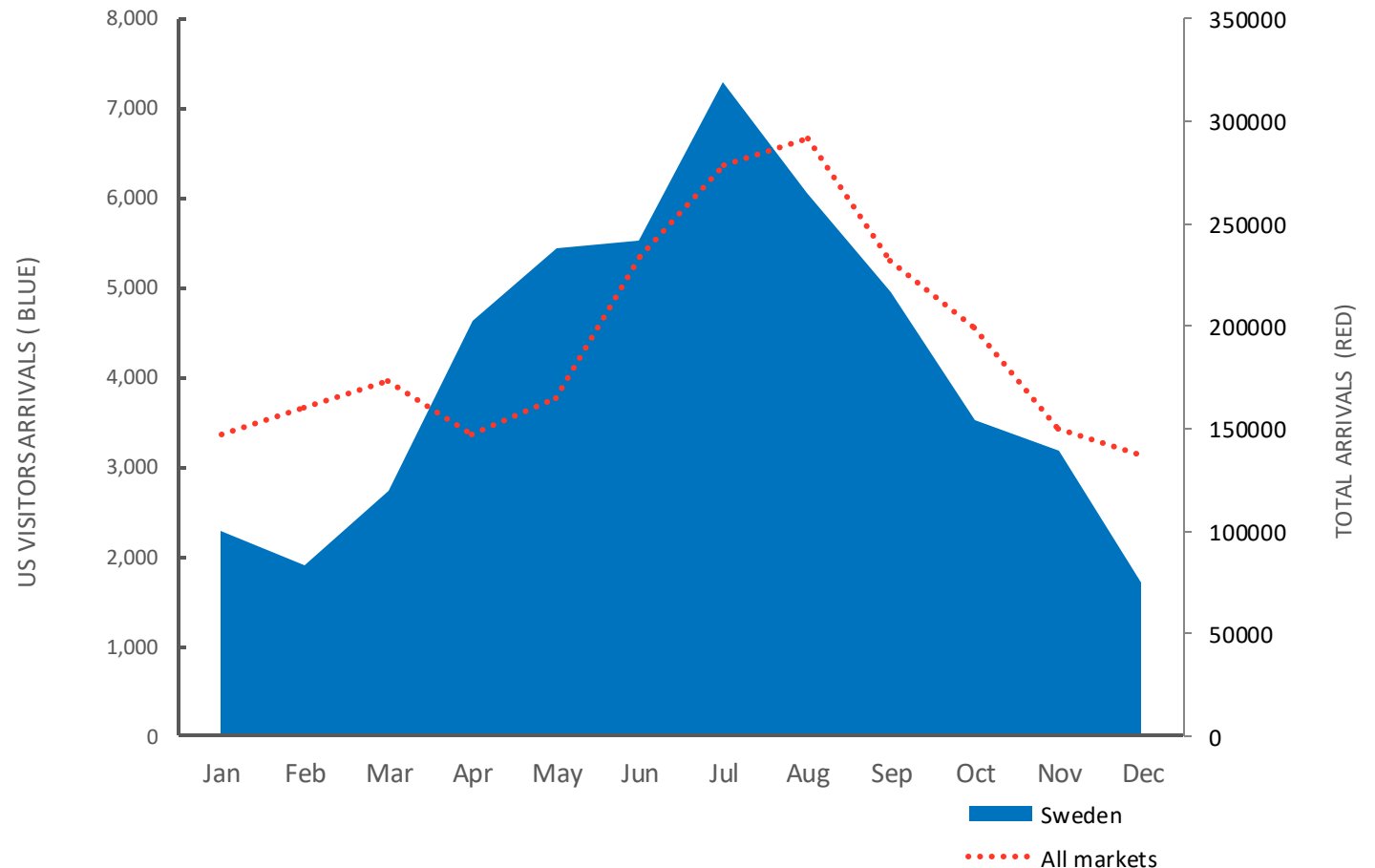
COME DURING

SUMMER: 38%
(JUNE - AUGUST, ALL MARKET AVG 35%)

WINTER: 24%
(JAN - MARCH, NOV - DEC
ALL MARKET AVG 33%)

SPRING: 20%
(APRIL - MAY, ALL MARKET AVG 14%)

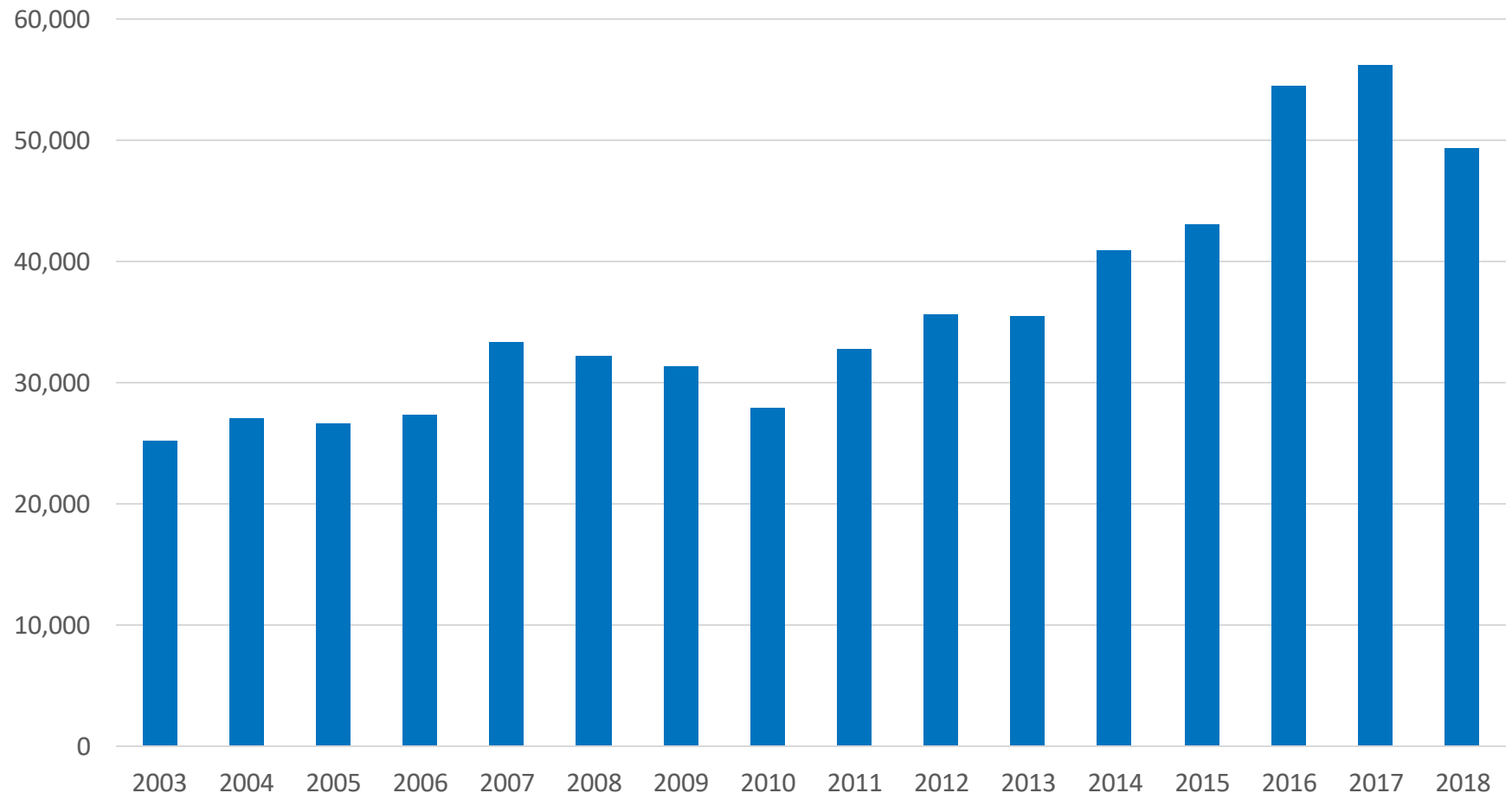
AUTUMN: 17%
(SEPT - OCT, ALL MARKET AVG 19%)



Arrivals over time

- WOW started direct all year flight to Stockholm Arlanda late 2016 but reduced it to only June – October in 2018
- Icelandair will not offer direct flight during summer time to Gothenburg in 2019
- Norwegian launched direct flight twice a week in 2018 but cancelled it again.
- The decrease in 2018 can be directly linked to fewer available flight seats.

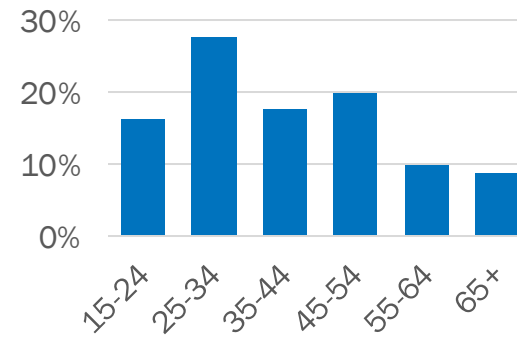
Visitor arrivals from Sweden



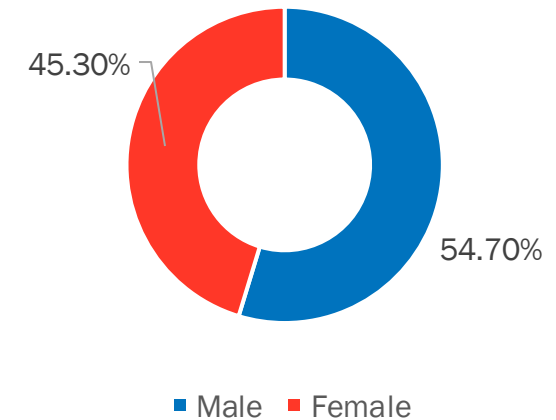
Traveler profile

- Sweden has the ninth highest per capita personal disposable income in the world and 25 legislated annual leave days per year.
- $\frac{3}{4}$ go on vacation every year.
- Outbound trips expected to increase to over 20 million in 2019.
- Swedes have the highest proportion of VFR-related trips of the Nordic Regions.
- The most visited places are UK, Spain and Poland is coming in strong as well.
- The travel trend in expected in Sweden is to travel further and stay for longer.

SW visitors by age



SW visitors by gender



MARKET SNAPSHOT PREPARED BY PROMOTE ICELAND

FEBRUARY 2019

Promote Iceland aims to enhance Iceland's good image and reputation, to support the competitive standing of Icelandic industries in foreign markets, to attract foreign tourists and investments to the country, and assist in the promotion of Icelandic culture abroad.

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