



Visit Finland

Kairos Travel Trends Report 2021 – Sweden market results

Visit Finland 20.12.2021

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Methodology

Kairos Travel Trends 2021 study, commissioned by Visit Finland, provides data on recent and future trends in the Scandinavian market. In total 1,297 Swedish, 1,250 Danish, 1,242 Norwegian and 1,401 Finnish respondents, aged 16-74 years, were reached through online panel. The samples are representative on geography, age and gender, and have been weighted according to national population size. The survey was conducted in September 2021. It includes also qualitative data collection.

Unique multi-method approach

TRENDWATCH

- Trend Database
 - Statistics
 - Spottings

WEB-SURVEY

- More than 4000 interviews in Sweden, Denmark, Norway and Finland
- Present leisure trends as well as future plans.
 - Quantified numbers, representative for age, gender and geography
 - Multi-dimensional analysis

CONSUMER DIARIES

Drivers and barriers in leisure spending
Values and preferences in depth



1. Past trips and plans for the next years

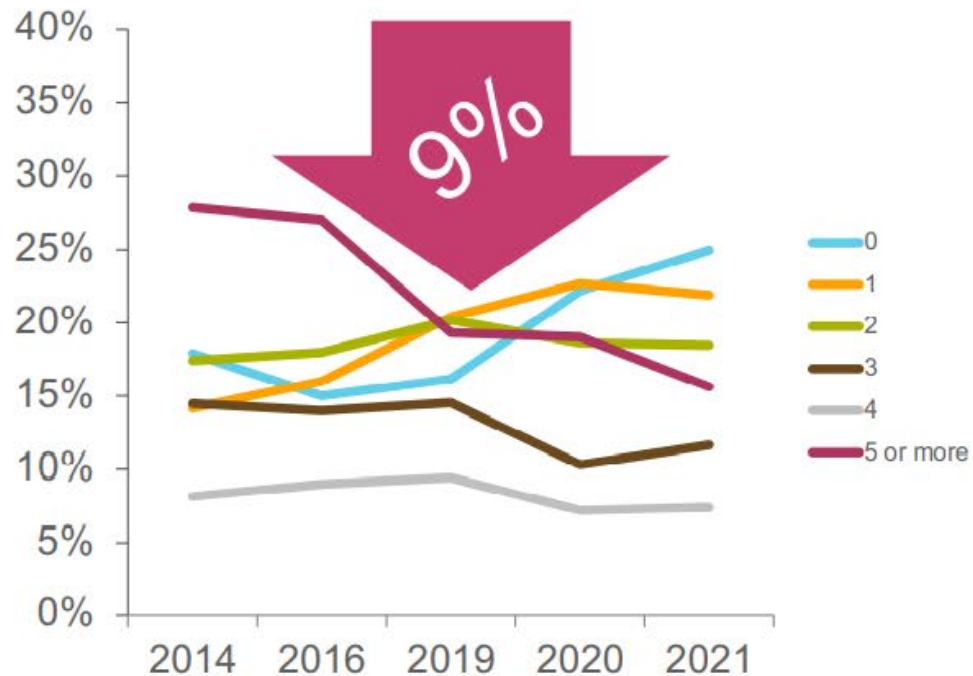
- Swedes have been traveling domestically
- But more a thinking about traveling abroad next year
 - And many are still undecided!
- 6% in Sweden believe they will travel to Finland next year
 - 10% in the coming three years
- The main holiday in Sweden takes places during the summer
- Increasing need for flexibility in uncertain times
- Helsinki most popular destination on the Swedish market (5%)
 - Coast and archipelago in second 4,4%
 - Lapland in third 2%
 - Lakeland in fourth 1%



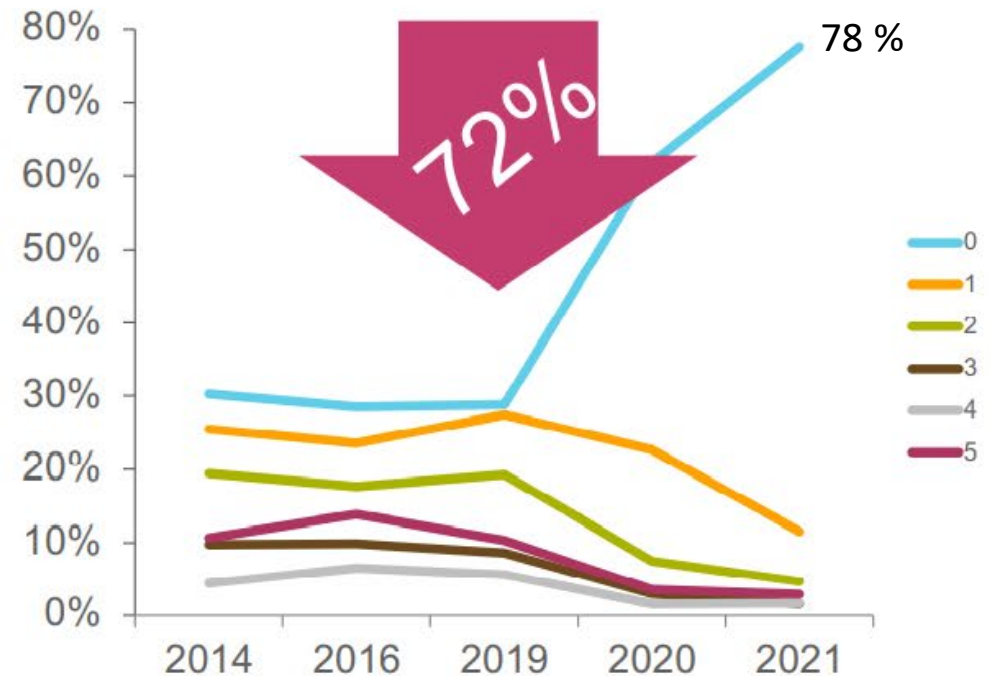


Less domestic and outbound trips in Sweden

Domestic trips: 20M in 2021 (22M) (24M)



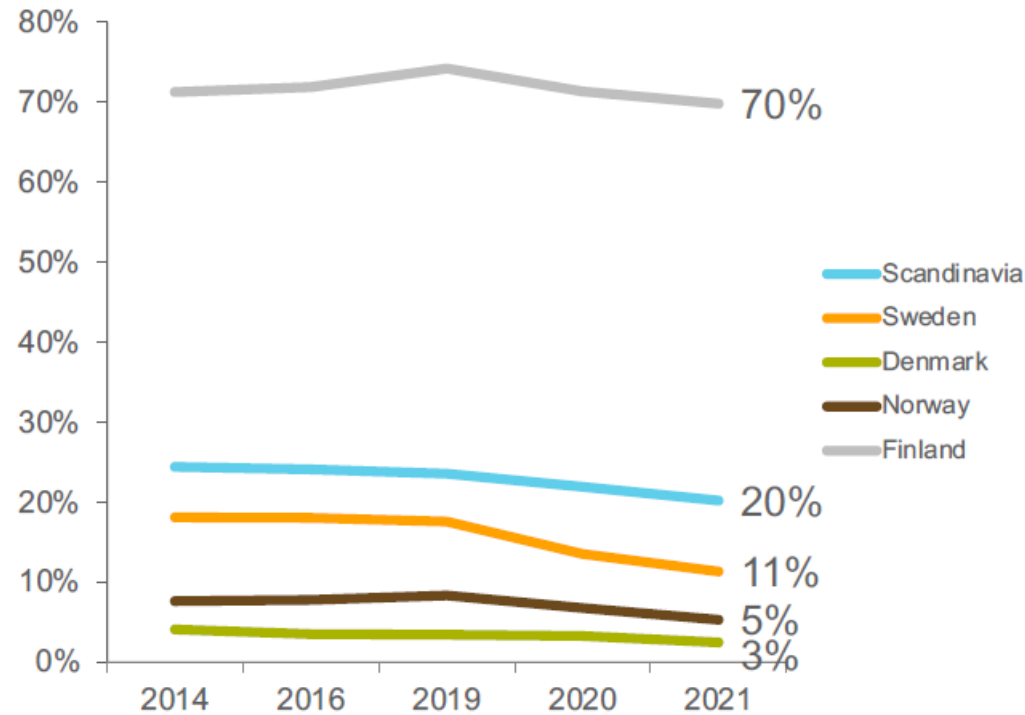
Outbound trips: 4,5M in 2021 (7,4 M) (16M)





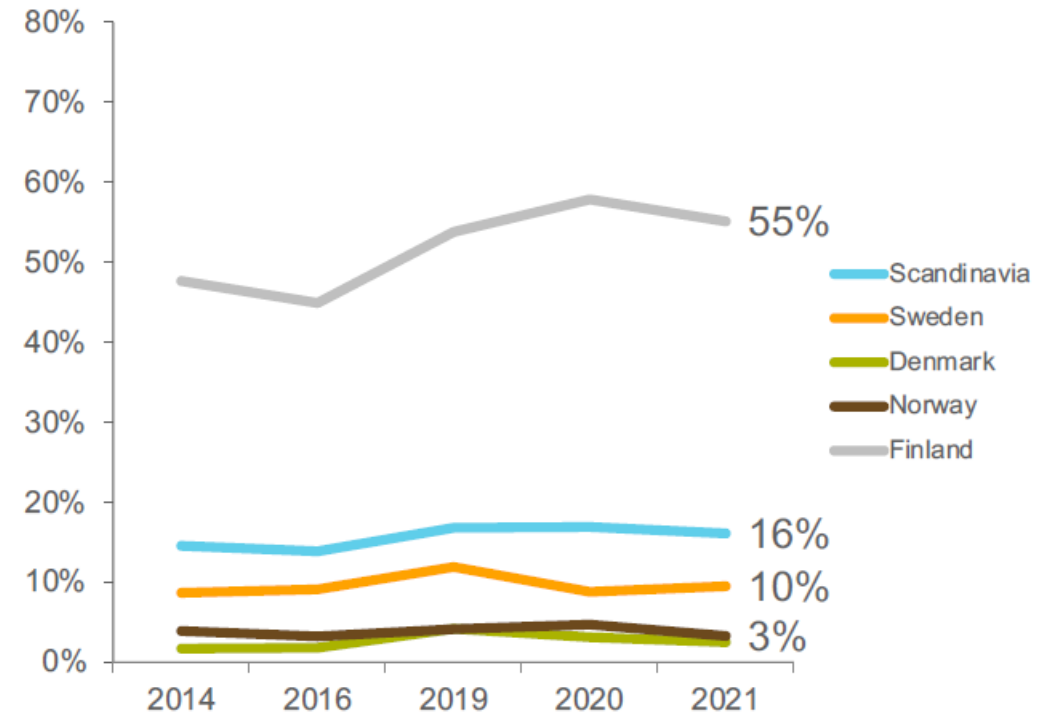
Increase in Swedes planning to travel to Finland in the last year

Share that have been to Finland



In which of these countries/regions have you been on a private trip during the last 3 years?

Share that is planning to travel to to Finland

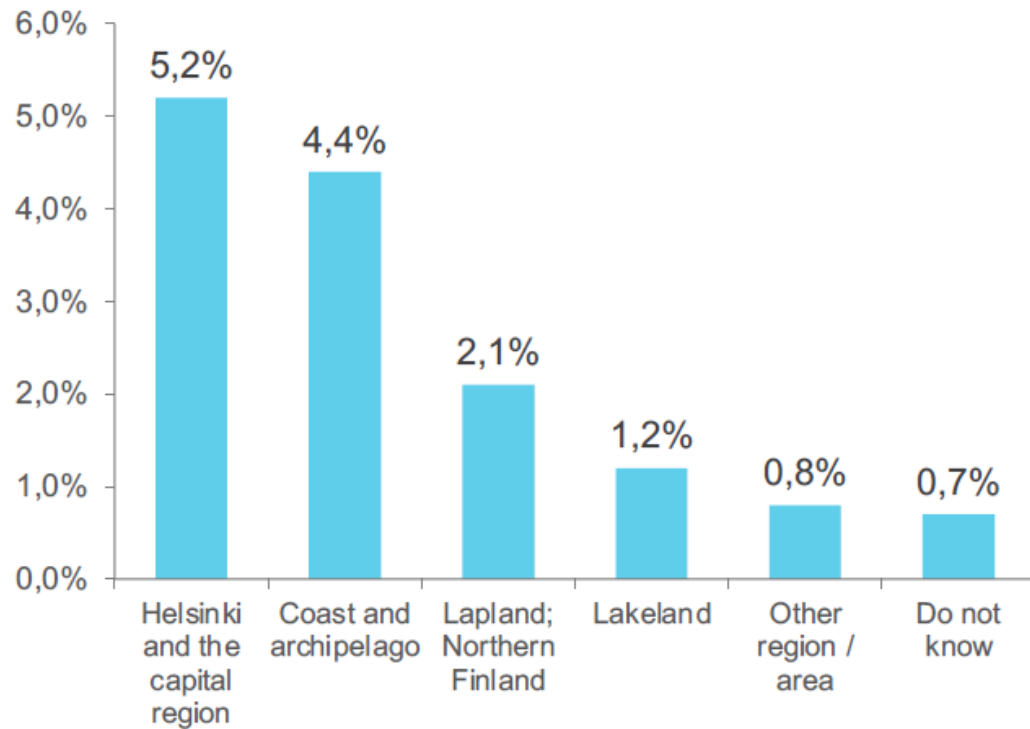


Can you imagine that you "fairly certain" are going to travel for a long or a short private trip to one or several of these countries/regions in the next 3 years?

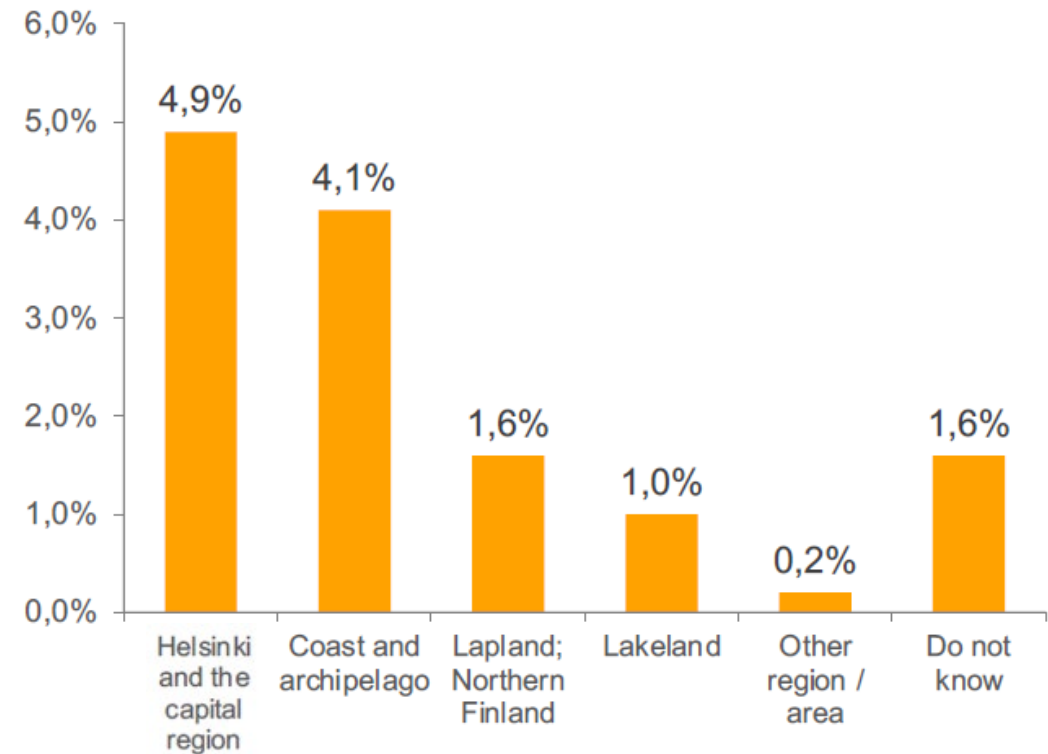


Most Swedes have been and is planning to travel to Helsinki and the Coast.

Share that have visited different parts of Finland



Share that is planning to travel to different parts of Finland

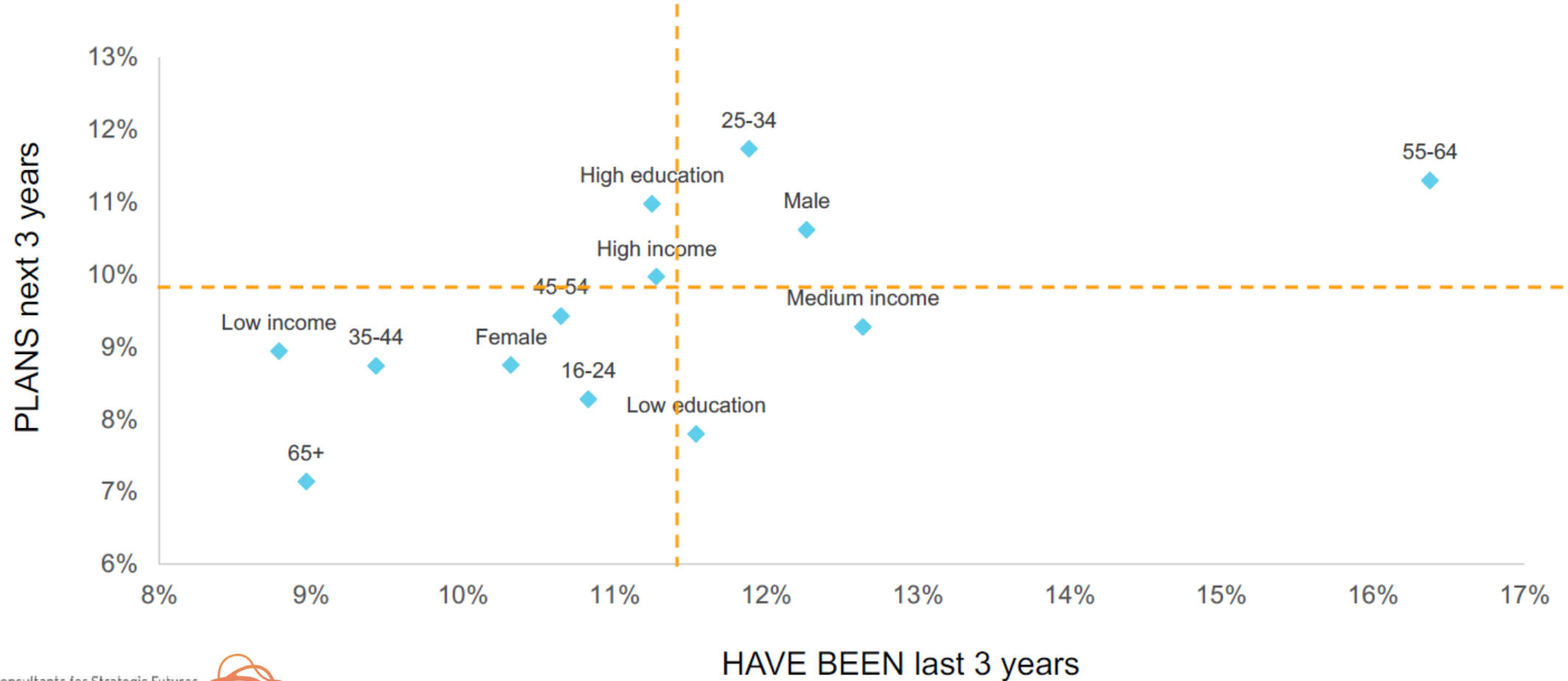




Swedish market

Finland by socio-demographics

The yellow dotted lines represent the share of Swedes who have visited Finland in the last three years (vertical line), and the share who intend to visit Finland in the coming three years (horizontal line)

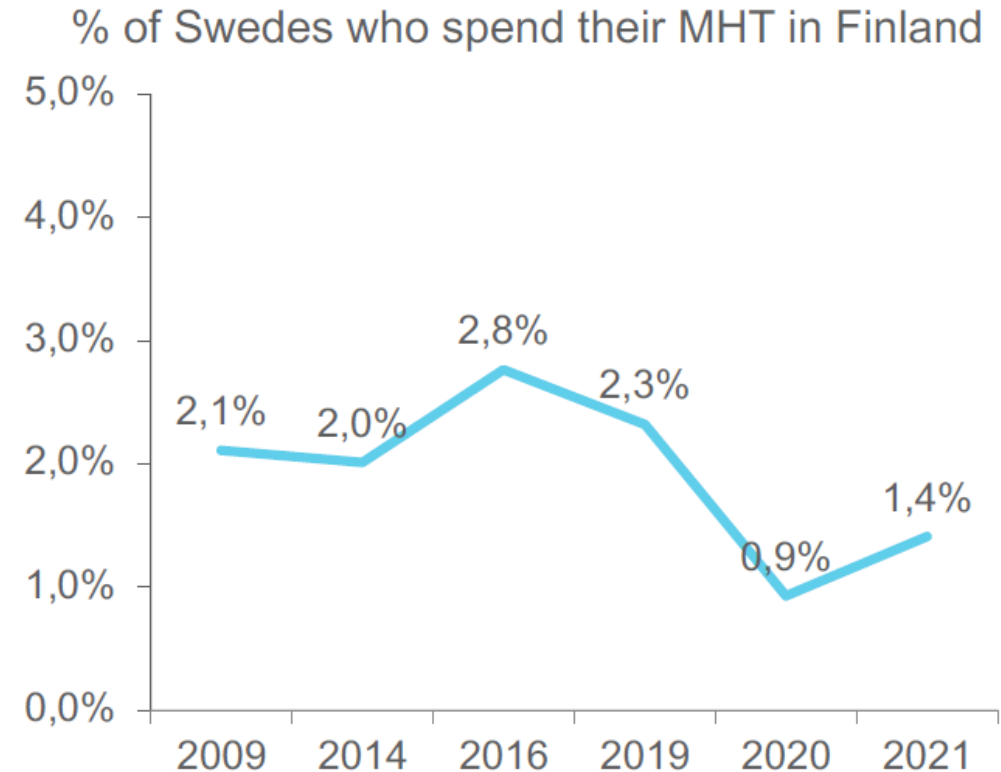




Sweden top 10

Where did you go during your most important private trip in the last 12 months? (Rank and % 2019)

- 1. Sweden 85% (#1, 36%)
- 2. Spain 2,4% (#2, 7%)
- 3. Germany 1,8% (#13, 2%)
- 4. **Finland 1,4% (#11, 2%)**
- 5. Greece 1,3% (#3, 7%)
- 6. Croatia 1,3% (#12, 2%)
- 7. Denmark 1,0% (#10, 2%)
- 8. Norway 0,9% (#7, 3%)
- 9. Italy 0,7% (#5, 4%)
- 10. Cyprus 0,6% (#18, 1%)



2. Transportation, accommodation and holiday forms

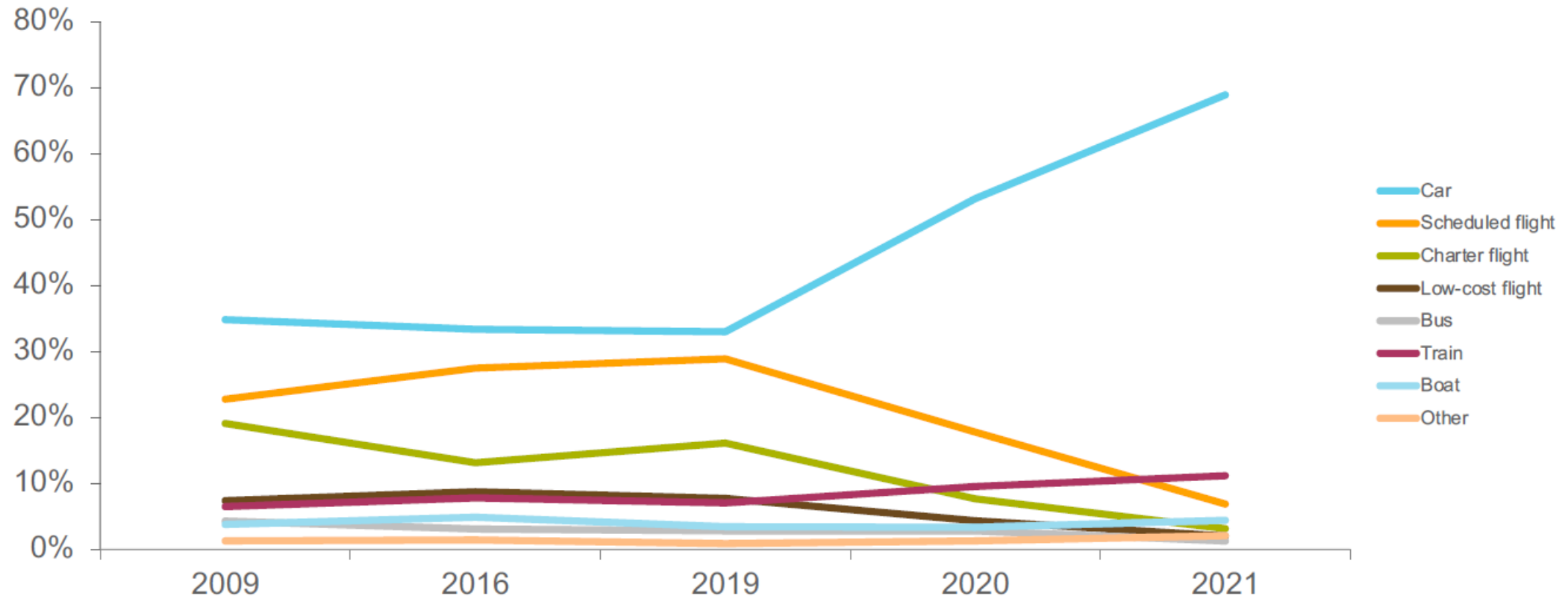
- The car has increased as a means of transportation
 - 8% have access to an electric/hybrid vehicle
 - 33% believe that access to charging is important when deciding what destination to travel to
- Swedes have been living in cottages, both their own and rented, as well as with family and friends
- More people in Sweden have been living in tents and in caravans and motorhomes
- We want to do more on our vacation and activities such as hiking, cycling and nature experiences have increased
- Winter activities show growth potential, as well as spa and all inclusive





The car has been the most popular choice of transport - slight increase in train travel.

How did you travel there?



Winners

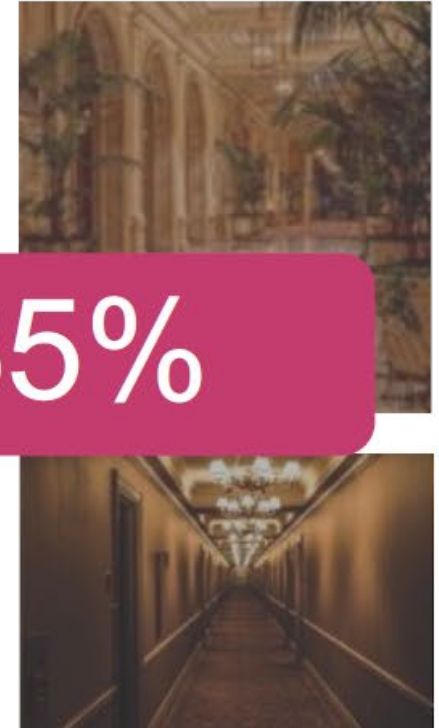
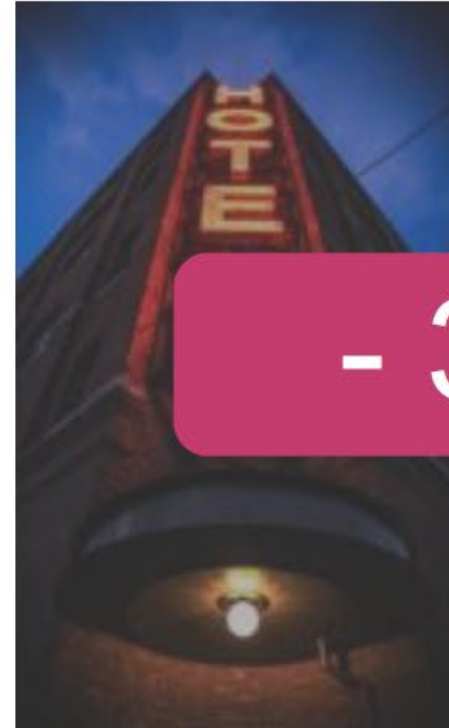


Motorhome/RV



Caravan

Losers



★★★ - 72%

★★★★ - 37%

★★★★★ - 30%

★★★★★ - 24%

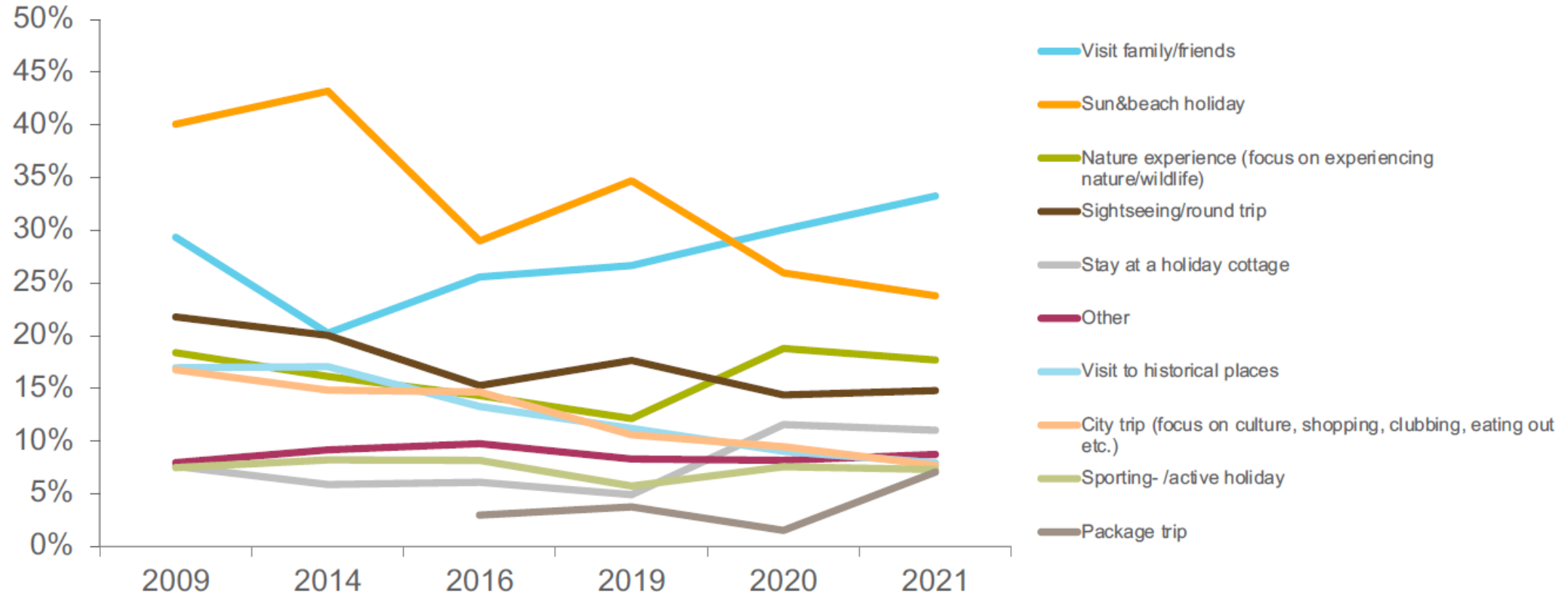




Visiting family/friends overtakes Sun & beach. Nature experiences take the third spot. Increase in package trips!

Which type of holiday was it? Top 10 (Several alternatives possible)

Main holiday trip, i.e. the most important, private, leisure trip taken in the last 12 months.



Sun and beach, City trips still playing in their own league

(Arrow show if there has increase/decrease in the share that is planning to try the holiday form between 2019 and 2021)

Holiday forms done in the past three years, and plans for the coming three years.

Holiday form	Have	Plan
Sun and beach	53%	55%
City trip	47%	47%
Sightseeing/round trip by car	25%	22%
Visit of an amusement park/ zoo/ theme park/aqua park	24%	22%
Cottage holiday (rented cottage)	20%	21%
Ski holiday (down-hill skiing)	17%	18%





Spa, Hiking and down-hill skiing show growth potential – limited potential for cruises

(Arrow show if there has increase/decrease in the share that is planning to try the holiday form between 2019 and 2020)

Holiday forms done in the past three years, and plans for the coming three years.



Holiday form	Have	Plan	
7. Shopping trip	16%	17%	
Hiking	15%	18%	↑
Cottage holiday (own/borrowed)	15%	15%	↑
All-inclusive	14%	16%	
Spa holiday	12%	15%	
Cruise with ferry in the Baltic Sea/Nordic Sea	12%	11%	↓
Cruise with traditional cruise ship in the Baltic Sea/Nordic Sea	6%	6%	↓





Cross-country skiing, motorhomes and cycling expected to grow

(Arrow show if there has increase/decrease in the share that is planning to try the holiday form between 2019 and 2020)

Holiday forms done in the past three years, and plans for the coming three years.

Holiday form	Have	Plan	
Ski holiday (cross-country skiing)	6%	7%	↑
A combination of business trip and holiday trip	6%	5%	
Caravan	6%	5%	
Motorhome/campervan	4%	5%	↑
Cycling holiday	4%	5%	
Training holiday	4%	7%	↓
Round trip by bus	3%	5%	↓





Food trips, training and winter holidays show growth potential

(Arrow show if there has increase/decrease in the share that is planning to try the holiday form between 2019 and 2020)

Holiday forms done in the past three years, and plans for the coming three years.



Holiday form	Have	Plan
Take part in a course	3%	5%
Golf trip	3%	4%
Culinary food trip	3%	6%
Study trip	3%	4%
Cruise holiday in other, more, exotic parts of the world	2%	4%
Interrail	2%	7%
Winter holiday (snowmobile/ dog sledging/ icebreaker/ whale safari)	2%	4%
Sailing	2%	2%
Cruise holiday in the Mediterranean	2%	3%



3. Spending and status in travelling

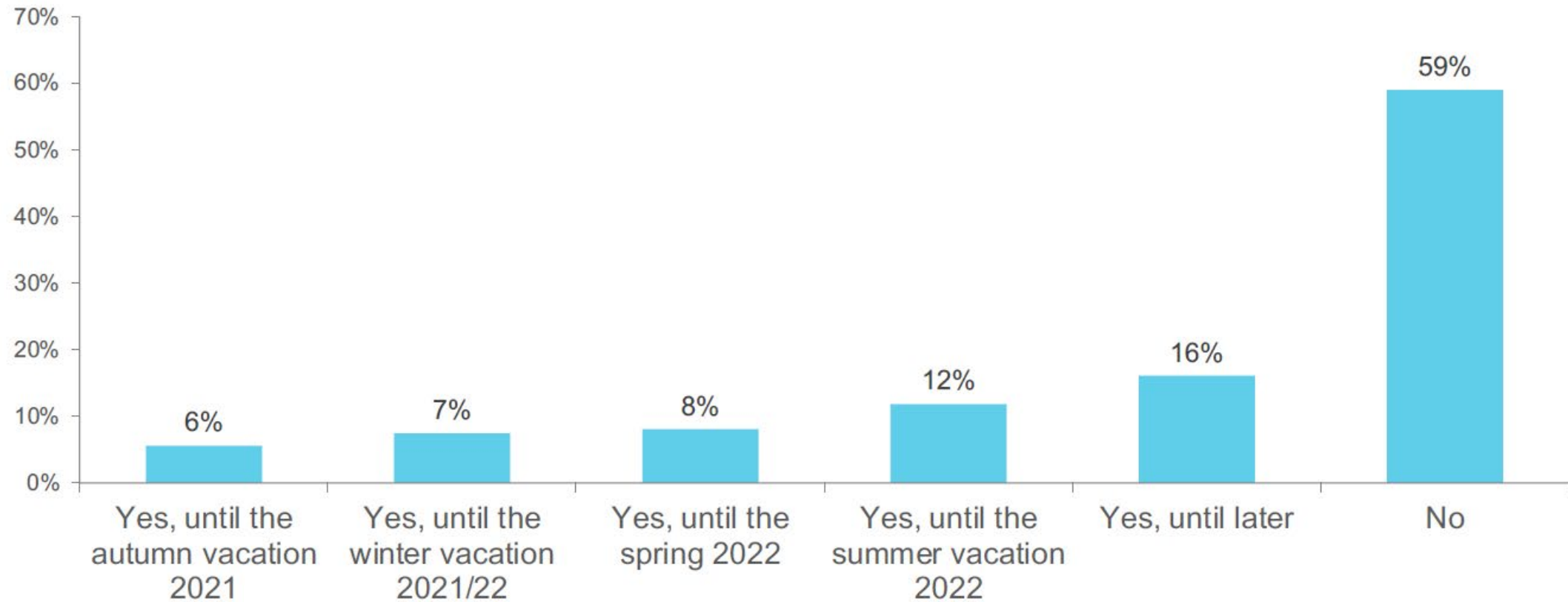
- 40% of Swedes have saved money to travel later
- 28% have saved vacation days
 - 70% of these more than 7 days!
- Swedes are planning to spend more on travel in general the coming three years, especially on:
 - Restaurants and experiences on the destination
 - Short weekends trips and hotels
 - Sustainable travelling
 - Services and amenities that makes traveling easier
- Cozy is status! And so is nature, close, relaxation and active holidays
- However, many Swedes also believe that exotic experiences is associated with status (55%)
- Young people in Sweden want more stretchy experiences while older is more drawn towards cozy





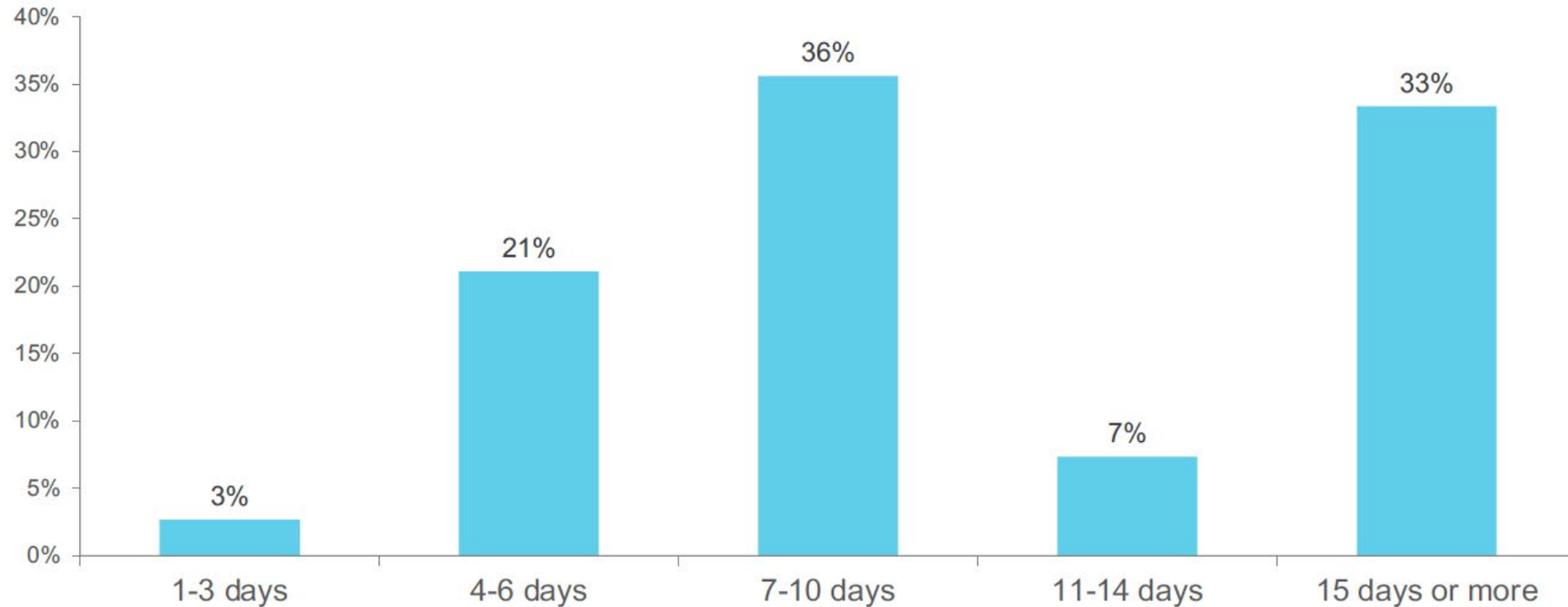
40% of Swedes have saved money to travel later

Have you saved money to travel later this year/when travel restrictions have been eased up?



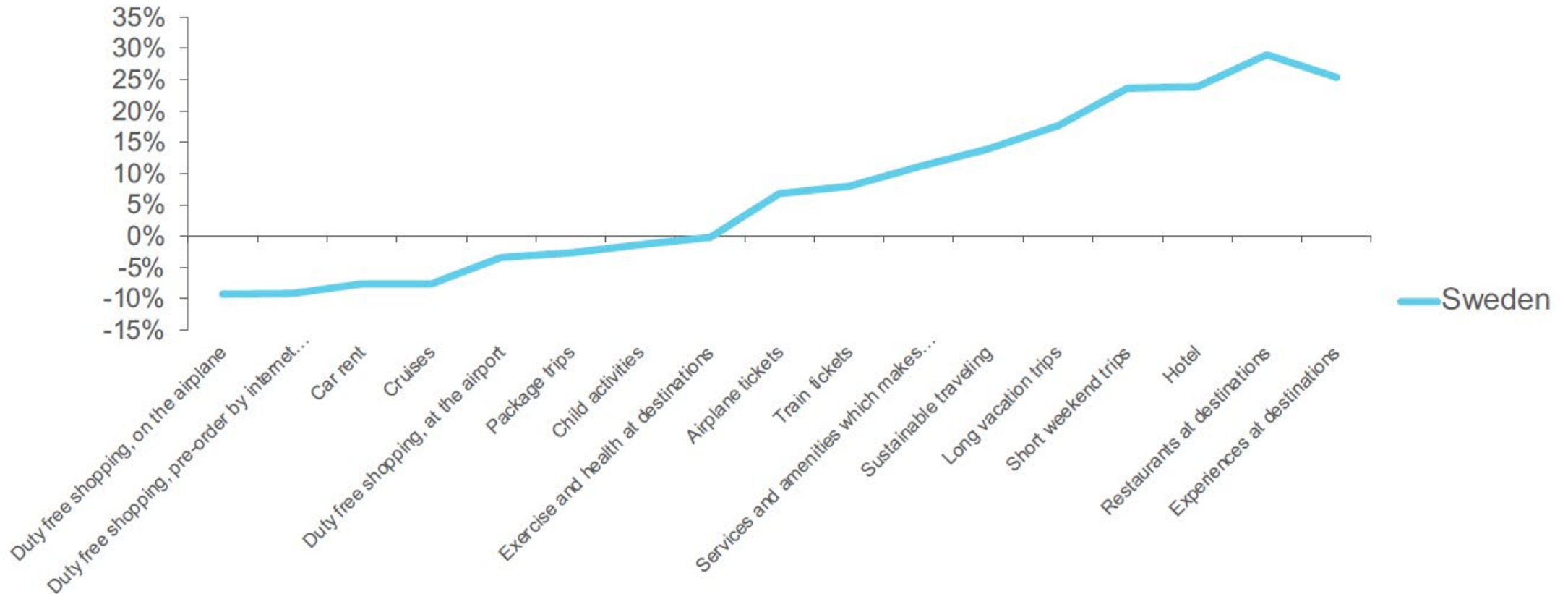
...and many have saved a lot of days.
70% have saved more than 7 days

How many vacation days have you saved?

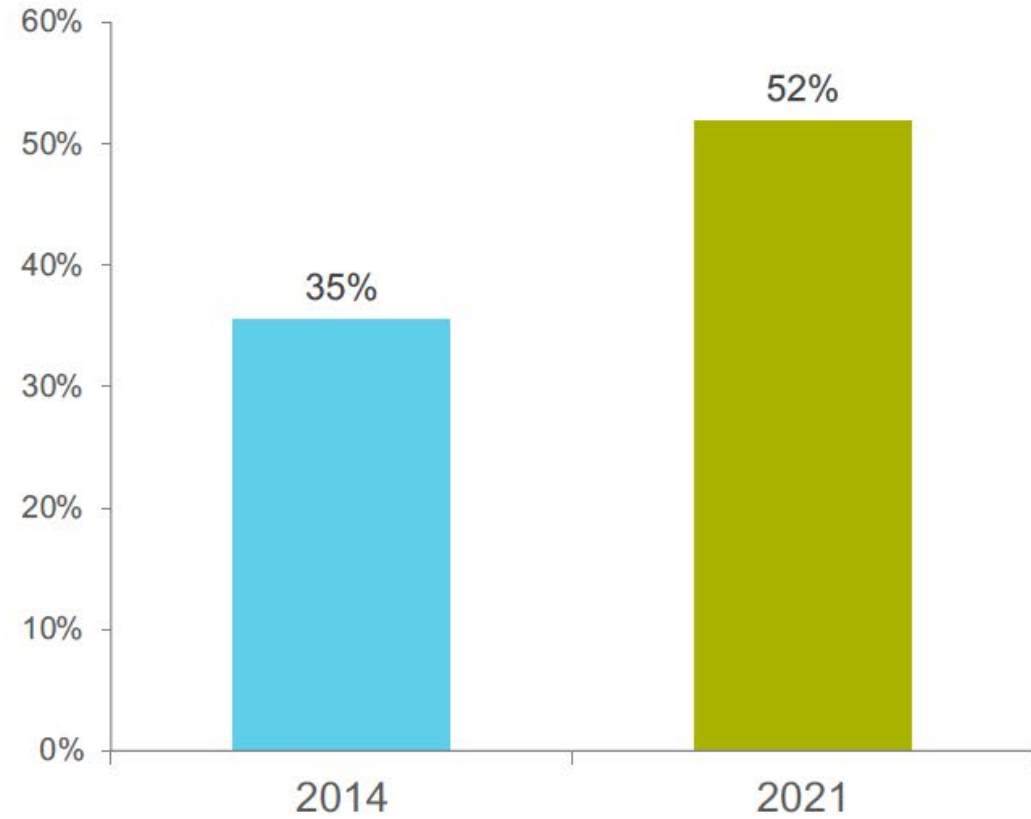


Spending in 3 years, more or less?

Do you believe that you during the coming three years will spend more, less, or equal amounts of money on the following activities. % more minus % less



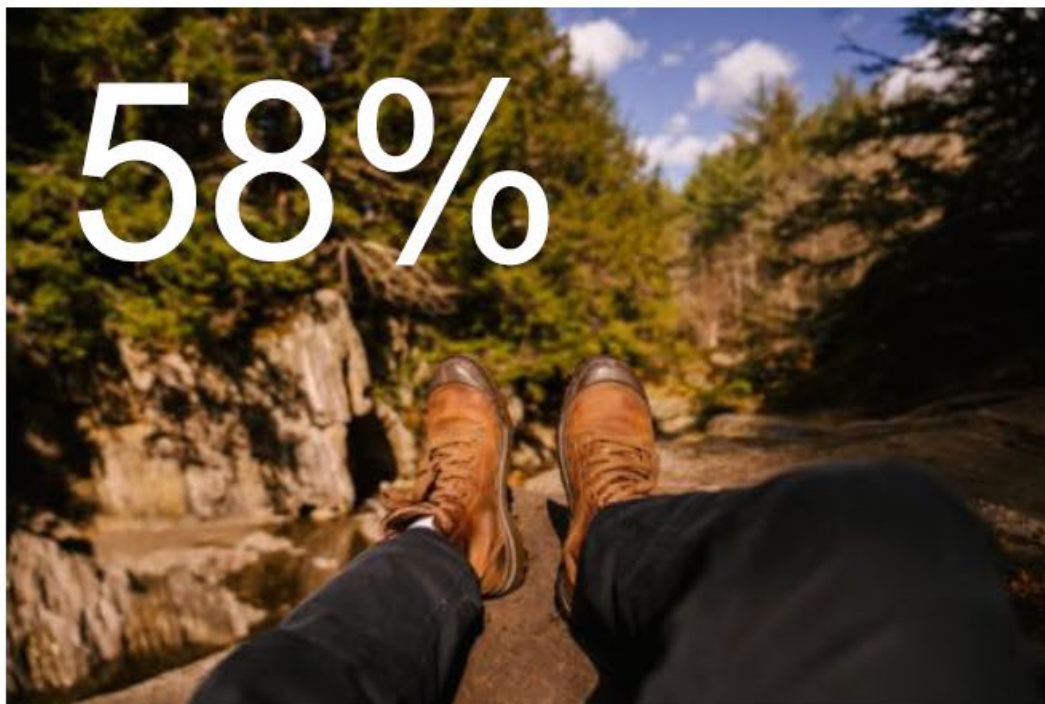
Nature is growing in status



Share that think being in nature on holiday is associated with high status



High status to both relax and be active



To rest and relax on holiday



To be active on holiday





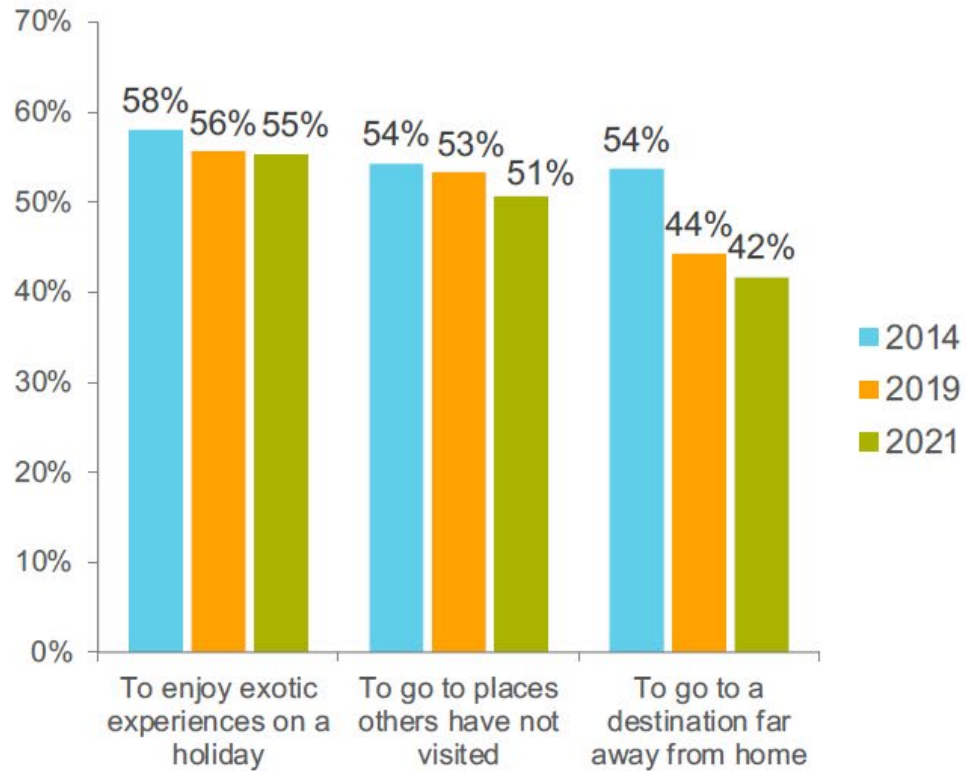
Exotic still high status...

55%

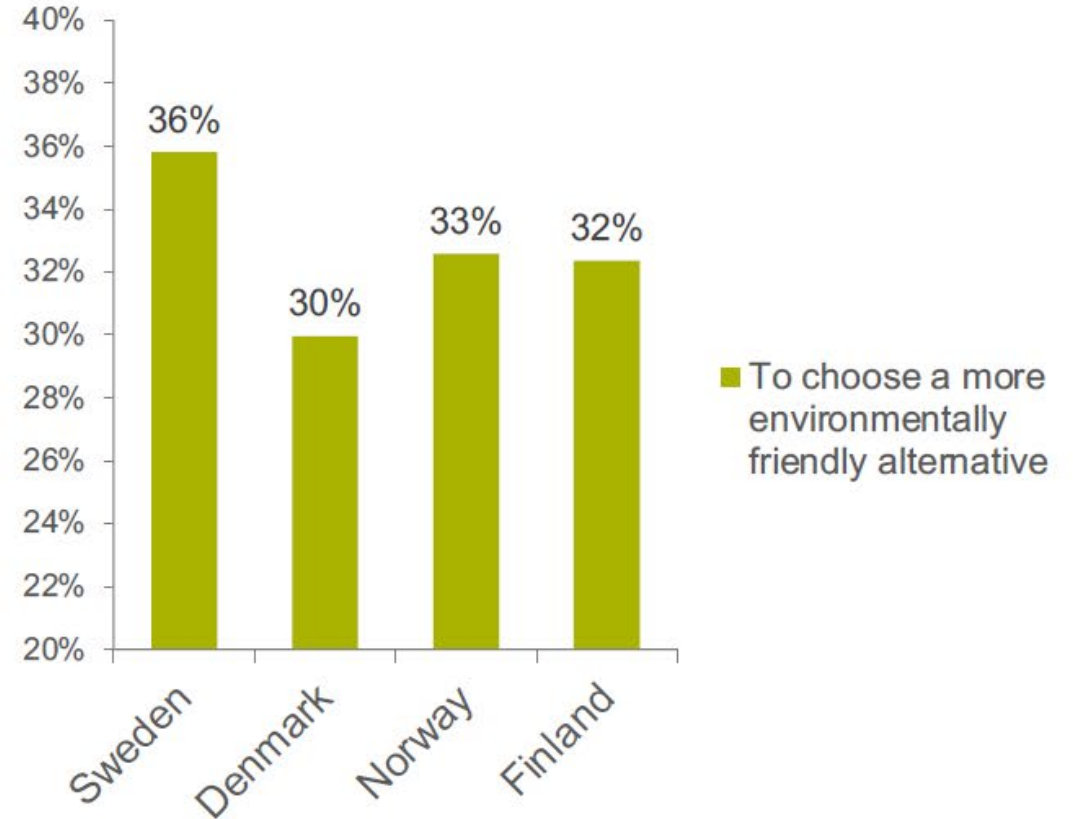
Share that think "to enjoy exotic experiences" is associated with high status



Exotic still high status, but is this the beginning of the end for the globetrotter?



Sustainability higher status in Sweden



4. Sustainability and post-corona travel trends

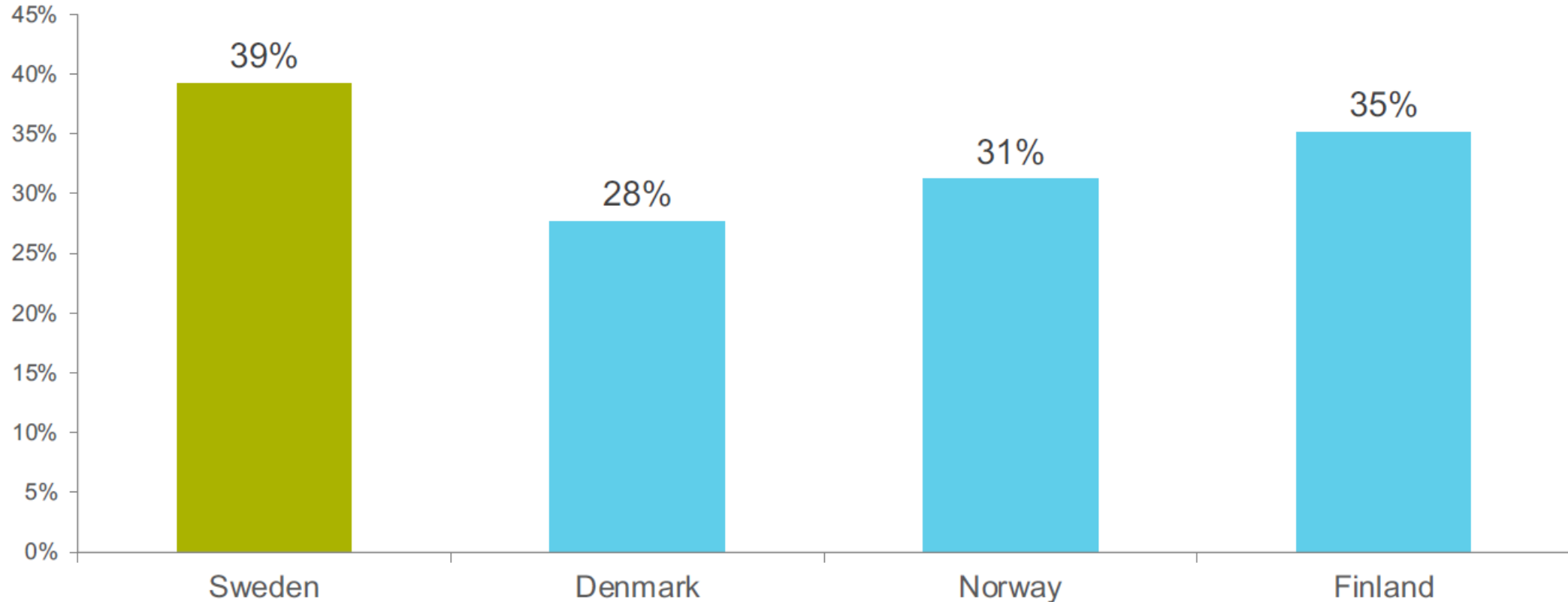
- Sustainability will remain important, and that Swedes will seek to travel closer to home and use more environmentally friendly transportation
- Eco-friendly offers and destinations will attract Swedes
- Swedes want to travel more and continue to travel by car and in a sustainable matter
 - More will fly, but not as many as before the pandemic
- In Sweden, people will travel more, both domestically and abroad
 - And make both more shorter and longer trips
- Hotels will bounce back, and the demand for cottages will continue to be higher than before the pandemic
- Swedes are still a bit undecided about virtual trips and bleisure
 - BUT – there is potential!





Higher willingness to change in Sweden!

Will you change your traveling during the following 12 months due to the climate change debate?



% that will change how they travel due to the climate change debate



ECO FRIENDLY OFFERS!

I will choose an eco-friendly offer from a normal tour operator



I will choose an eco-friendly tour operator

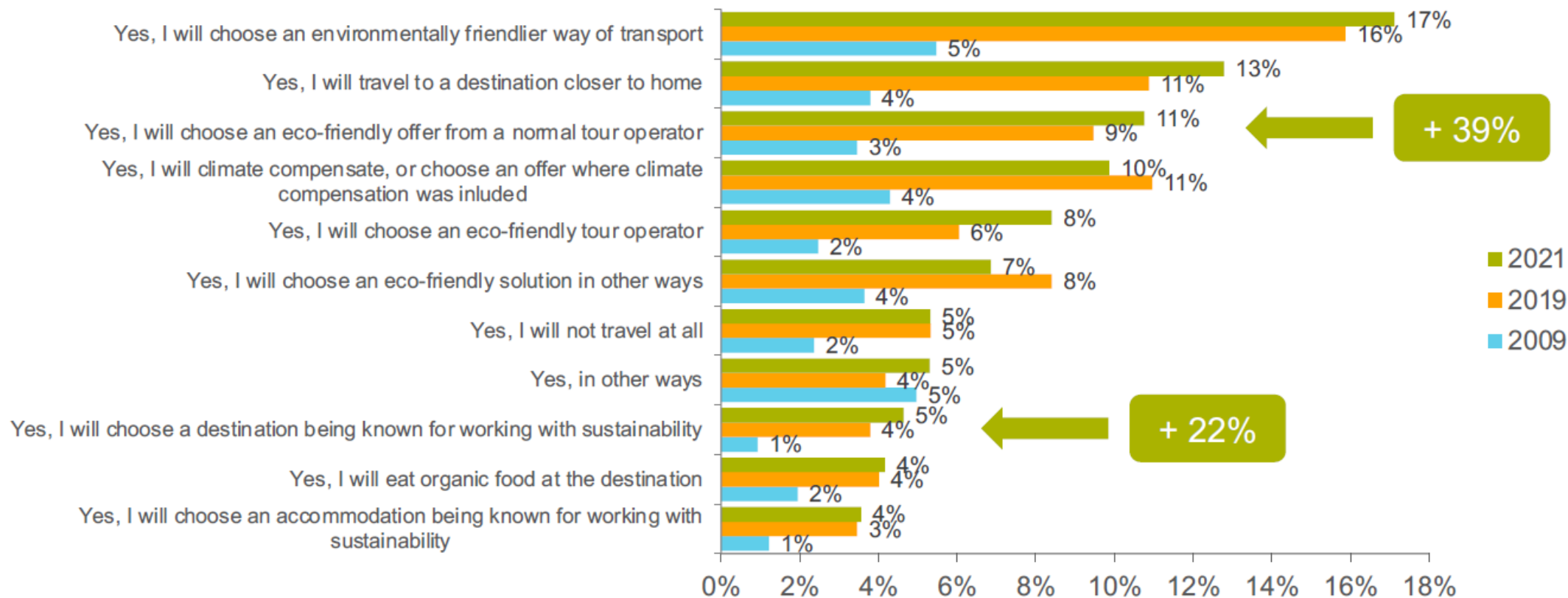




Transport and close continues to increase.

More important for tour operators to have eco-friendly offers and to be know for working with sustainability as a destination

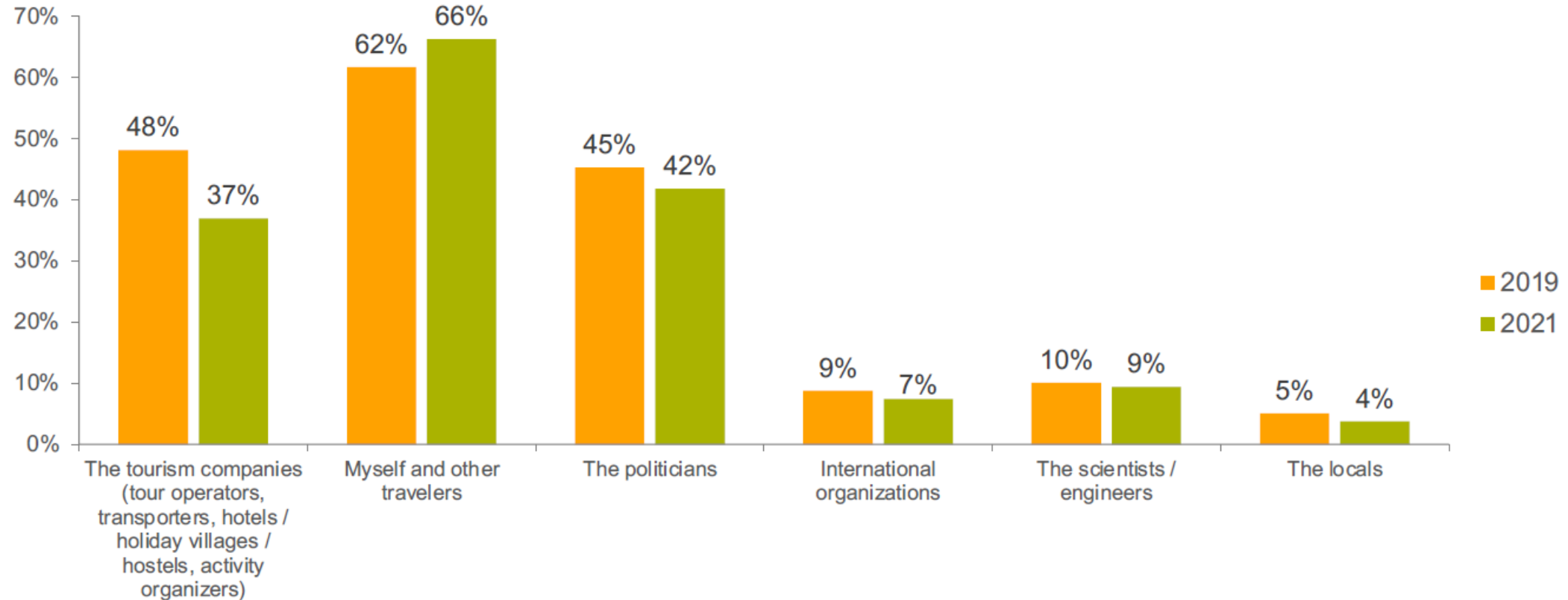
Will you change your traveling during the following 12 months due to the climate change debate?





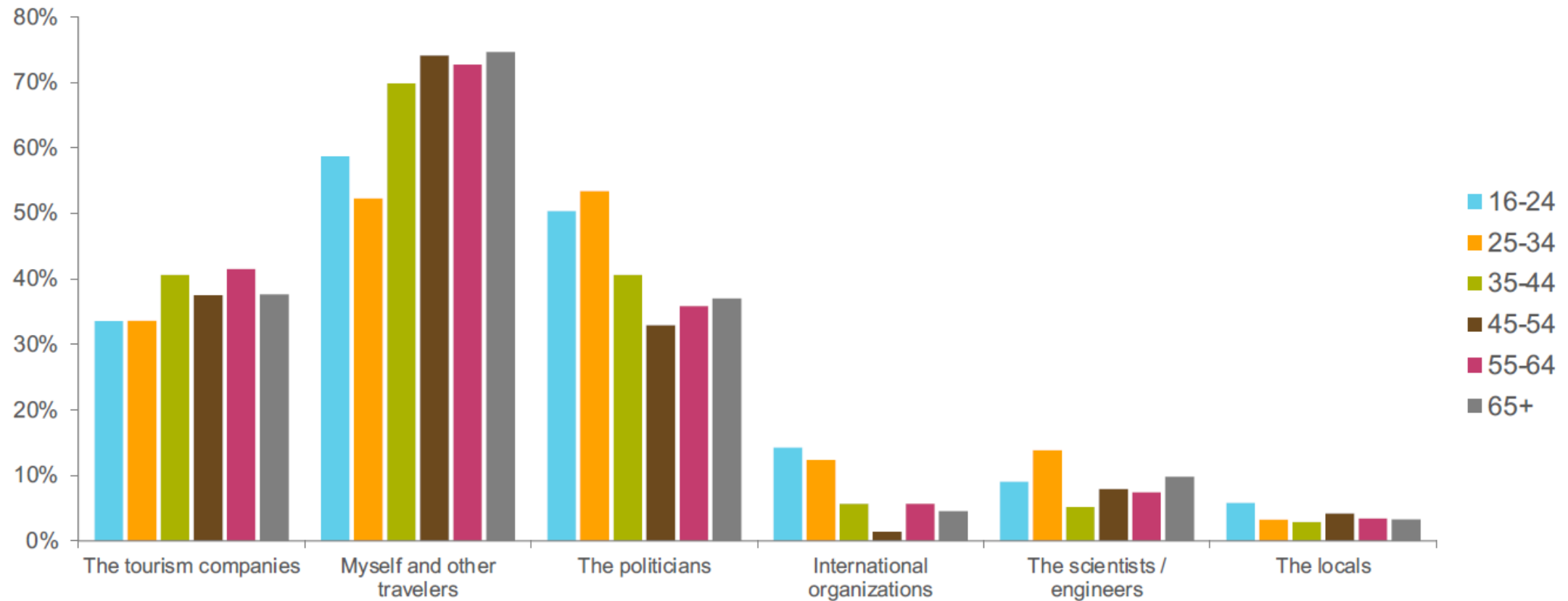
Swedes feel they are responsible!

Who do you think is most responsible for reducing the negative impact of the holiday traveler on the environment? (Choose two)





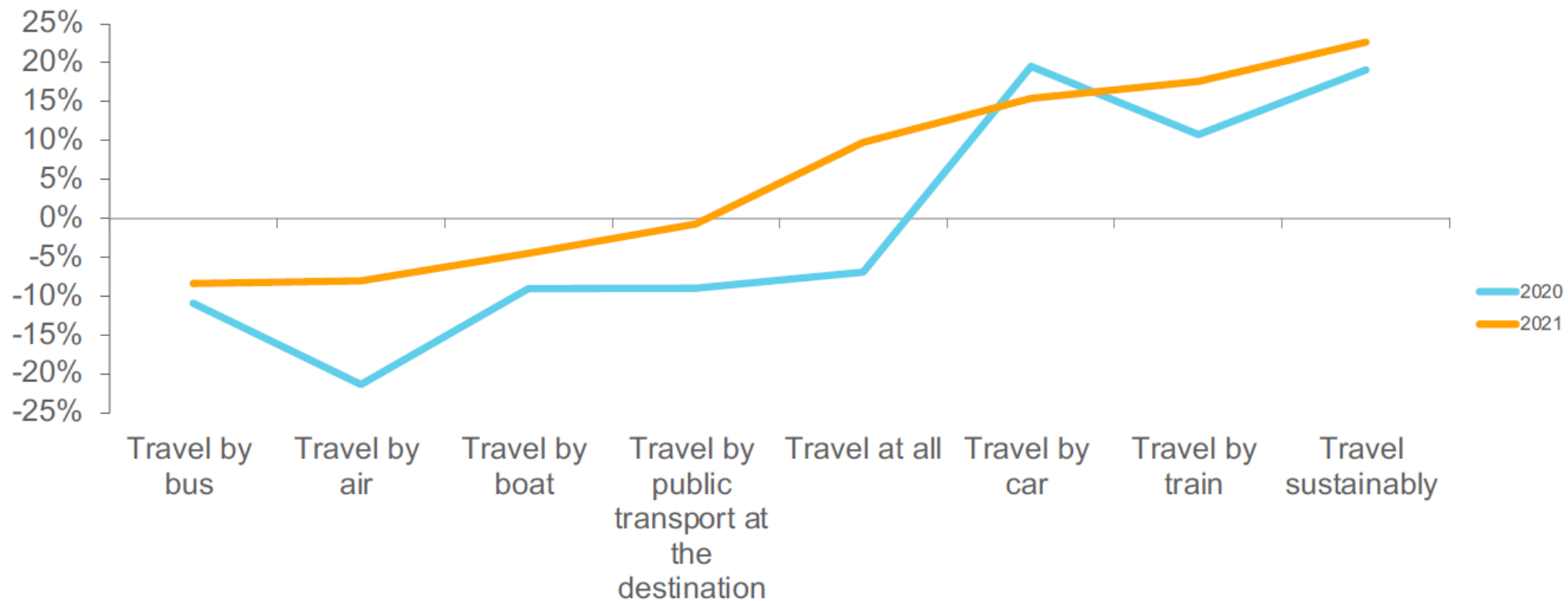
Especially older demographics! Young Swedes hold politicians more accountable





More Swedes think they will travel, and more sustainable. Still, more believe they will fly less

In comparison with the time before Corona, to what extent do you think you will do the following when the pandemic is over?. (% more minus % less)





Looks like hotels will start to bounce back. Cottages will remain popular

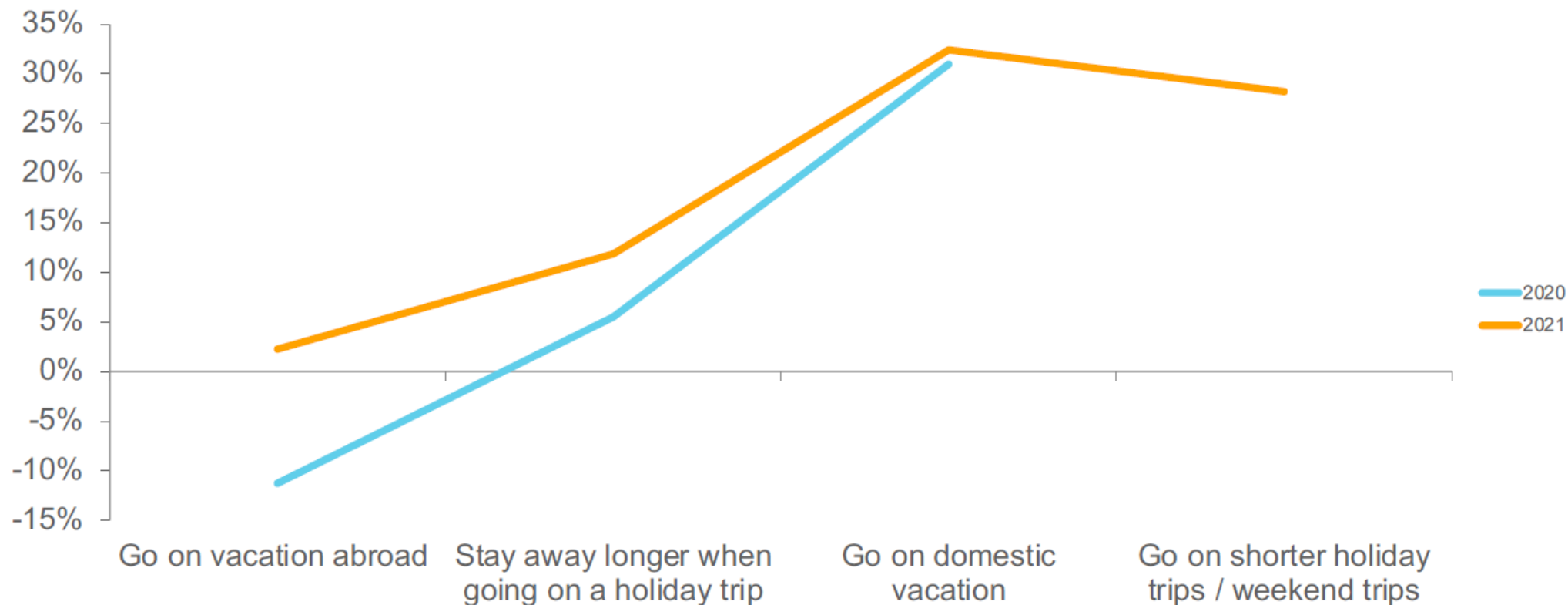
In comparison with the time before Corona, to what extent do you think you will do the following when the pandemic is over?. (% more minus % less)





More, both domestic and abroad! More, both longer and shorter trips!

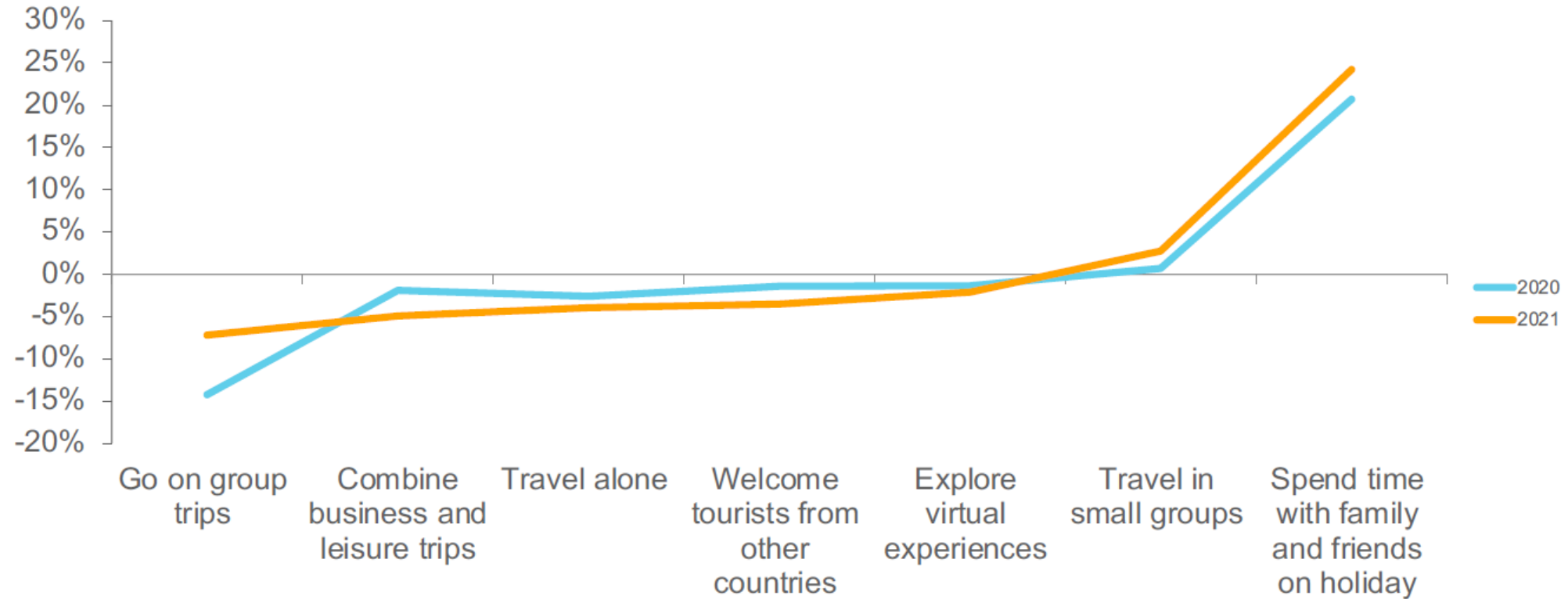
In comparison with the time before Corona, to what extent do you think you will do the following when the pandemic is over? (% more minus % less)





Swedes are still undecided about virtual trips and bleisure

In comparison with the time before Corona, to what extent do you think you will do the following when the pandemic is over?. (% more minus % less)

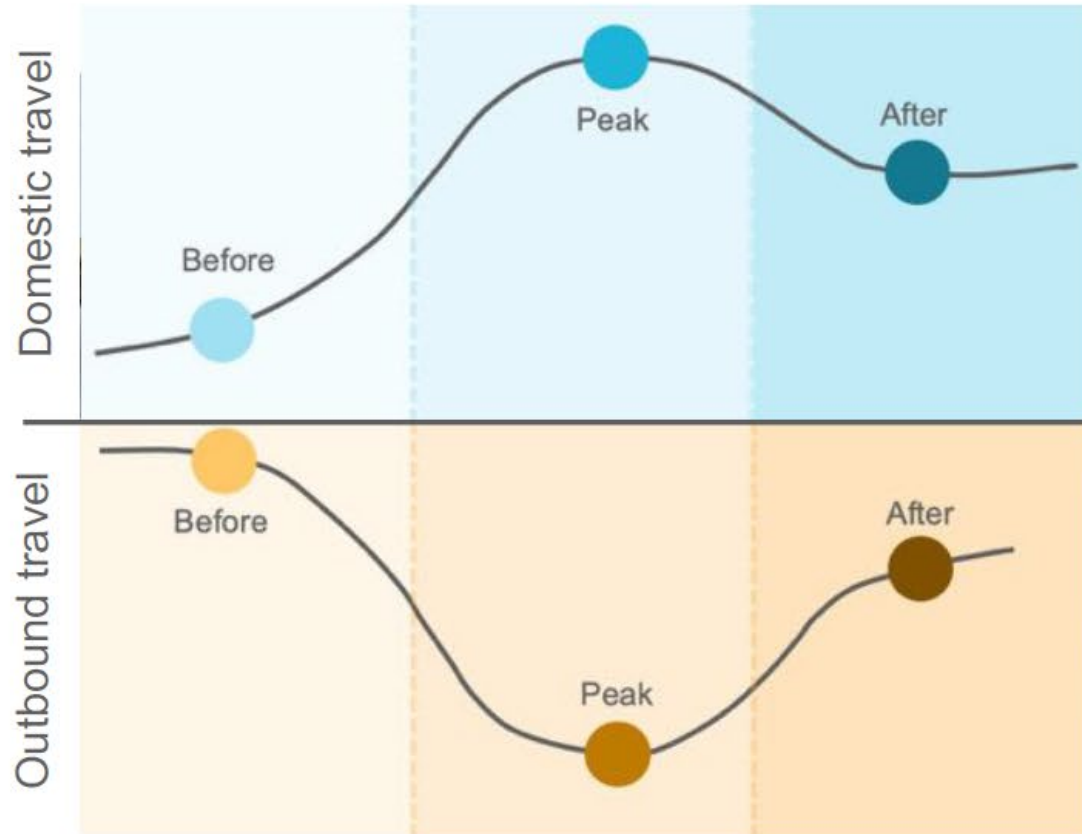




Travel patterns:

What does the change look like?

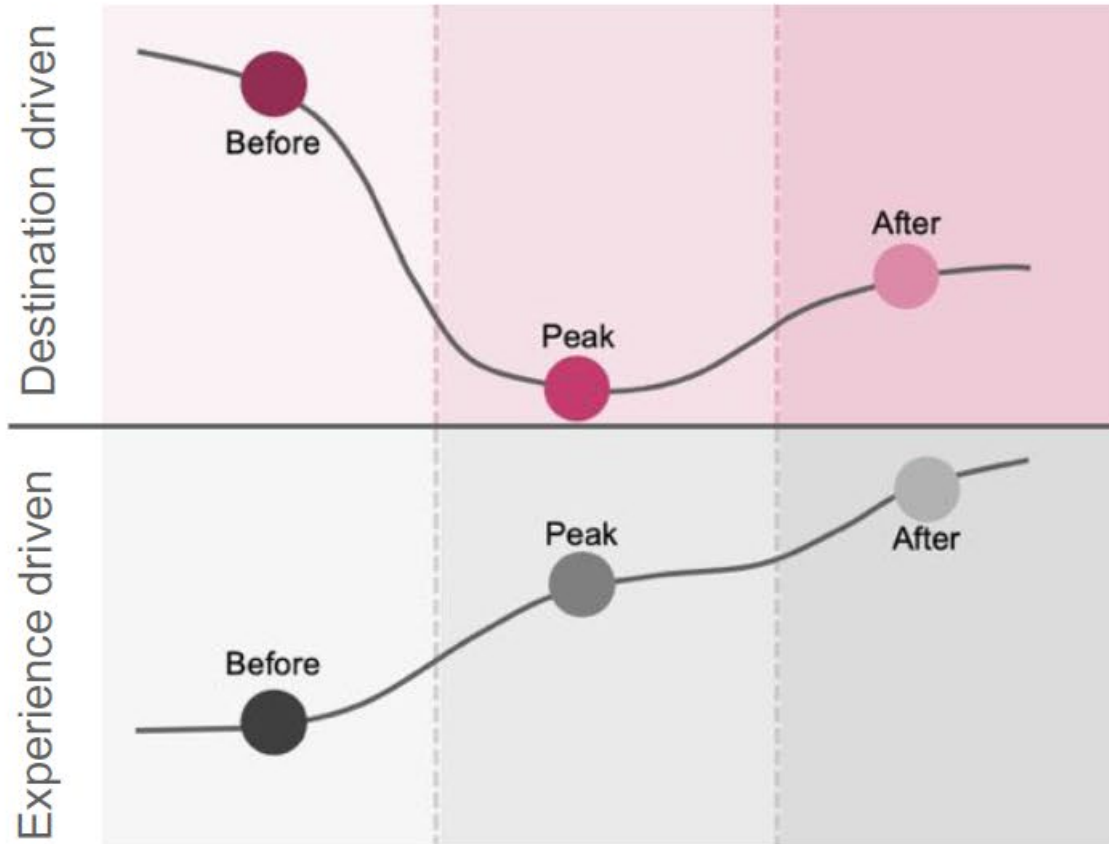
Domestic vs Outbound



Driving forces:

What does the change look like?

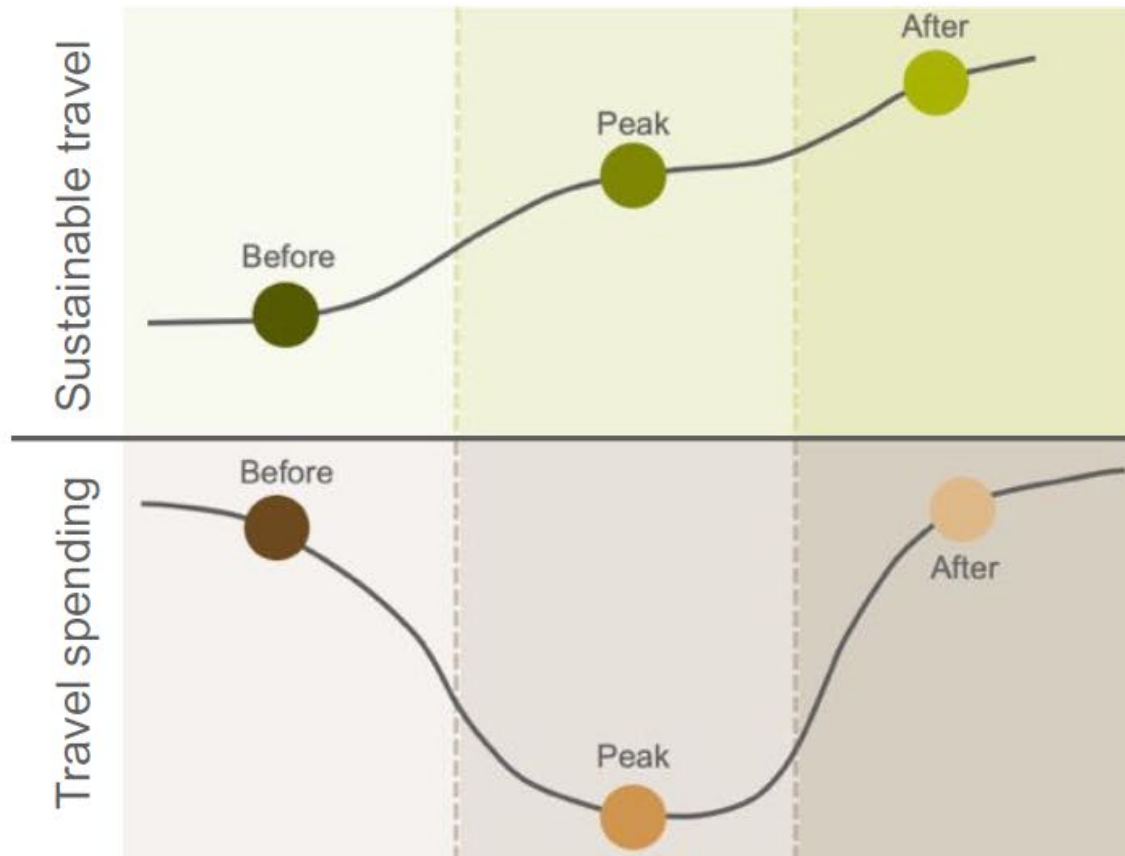
Destination vs Experience



Values:

What does the change look like?

Sustainability vs Spending





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