

Nordic

Market Summary

The Nordic region has recorded an increase in arrivals for the February 2010 calendar year to date, compared to the same period in 2009. Sweden and Norway have shown significant increases in total visitors for the same period, which is consistent with trade feedback that consumer confidence is returning to the market.

In terms of leisure arrivals specifically, Nordic Holiday visits, representing the largest visitor segment, have increased slightly while Visiting Friends and Relatives visits have shown good growth for the two months to February 2010. Business visits, whilst only a small proportion of the market, have shown growth for this period.

The recent Iceland volcanic eruption and ensuing flight disruptions across Europe have had a significant impact on consumer transportation to and from Europe as well as economic impacts for the countries affected. It is too soon however to assess and report on the full impact on Australian travel and tourism.

1. Market News

- Swedish consumer confidence rose to 15.5 points in March, up from 13 points the previous month, says the National Institute of Economic Research. *Source: Reuters, March 24, 2010*
- Finnish consumer and industry confidence slipped slightly in March from February. Consumer confidence stood at 15.4 points in March compared with 15.9 points in February say Statistics Finland. *Source: Reuters, March 29, 2010*
- Finland's economy contracted 7.8 per cent in terms of GDP in 2009, higher than the Euro zone average of 4.1 per cent. *Source: www.stat.fi, March 1, 2010*
- According to the Swedish public employment service Arbetsformedlingen, Sweden's unemployment rate rose to 5.7 per cent in January 2010, corresponding to some 265,000 unemployed, up from 4.5 per cent in January 2009. *Source: www.silobreaker.com/statistics, February 10, 2010*
- Compared with other countries, the recession in Norway has been less severe. When the downturn hit the Norwegian economy, it was met by strong fiscal and monetary stimulus and large oil revenues give much freedom in economic policy, says the government. *Source: www.fnh.no/en, January 14, 2010*

2. Consumer Insights

- Finnish research firm Taloustutkimus says that 31 per cent of Finns plan to spend more on travel in 2010 than they did last year. More than half of Finns are planning a trip abroad, with 46 per cent saying that their next trip abroad would be to a city and 27 per cent saying it would be a beach resort. *Source: Esmerk Finnish News, January 19, 2010*
- According to the Association of Finnish Travel Agents, Finns went on fewer package holidays last year compared with the year before. The most popular destinations remained Spain, Greece and Thailand. *Source: Esmerk Finnish News, January 18, 2010*
- Wealthy Swedes plan to spend more money on summer holidays in 2010 than they did last year. 70 per cent of the country's 1,472 millionaires expect to take four weeks off while 16 per cent expect to take over two months off for a holiday. *Source: Esmerk Swedish News March 17, 2010*
- Sweden took the number one spot from the United States to top the annual rankings on the usage of telecommunications technologies such as mobile phones and computers. *Source: Reuters, February 11, 2010*
- Swedish consumers made visa card purchases worth a combined total of SEK 340 billion (€33.63 billion) in 2009. The annual statistics mark a 10 per cent increase from 2008 and indicate that credit/debit card payments are growing in popularity. *Source: Esmerk Swedish News, February 2, 2010*
- The most popular destination for Swedes this summer is Turkey's Alanya. Sales of charter travel to Turkey are up 40 per cent compared with sales during the same period last year. *Source: www.swedishwire.com March 16, 2010*
- Research from Cyprus indicates that Swedish tourists spend an average of €31 a day on the island during their holidays, representing the lowest average amount spent by visitors to the Mediterranean island. *Source: www.swedishwire.com March 16, 2010*

For the latest in visitor arrivals, please visit 'Research and Statistics' at www.tourism.australia.com

3. Trade Update

- Team Benns has opened a new office in Oslo, Norway selling tailor made travel to Australia and New Zealand for the 40 year old and over FIT market.
- There have been significant moves in Scandinavian online travel with news that TravelStart has sold its European business to Swedish rival eTRAVELi a consortium of web-based travel brands. The deal gives the eTRAVELi group a major presence in the Nordic market through its wide portfolio of consumer brands including TravelStart, FlyBillet, Seat24 and GoToGate. *Source: www.tnooz.com/2010/01/21/news, January 21, 2010*

- As at March 2010, there were 322 Aussie Specialist agents in the Nordic market, of which 74 per cent were fully qualified.

4. Airline News

- Qatar Airways added flights to Copenhagen with four flights a week, non-stop from Doha, the airline's operational hub. After Stockholm, the Danish capital becomes the second Scandinavian destination served by Qatar Airways, the only Gulf carrier serving the region. The increased services will offer Scandinavian passengers greater accessibility to connecting flights to Australia. Source: www.asiatraveltips.com, February 21, 2010

5. Competitor News

- Swedish tourists are expected to flock to Sri Lanka this year with around 7,000 Swedish charter tourists planning to visit the island during the 2010 winter season. According to the Sri Lanka Tourism Promotion Bureau (SLTPB), Swedish charter tour groups are prioritising the Sri Lankan market. Source: www.sundaytimes.lk, January 31, 2010
- In 2009 the number of Finns visiting Indonesia was 11,500, representing a 135 per cent increase compared with the previous year. Due to this substantial growth, Indonesian tourism officials plan to target the Finnish market, stating that Finland offers very promising tourism prospects. Source: www.anakbawang.com, February 11, 2010
- Spain's Andalusia region says it plans to specifically target Nordic tourists and draw them away from other Spanish destinations. Source: www.theleader.info, January 21, 2010
- Thailand's Tourism Authority has identified the Nordic region as a key market for 2010. Source: www.traveldailynews.com, January 27, 2010
- Thai Airways International has increased services to Oslo from five weekly to daily non-stop services. Source: www.ttrweekly.com, January 29, 2010
- Finnair's scheduled traffic grew in March 2010 by 19 per cent compared with March the previous year. Long-haul traffic business class sales in particular are clearly better than before, says the airline. Asian traffic grew in March by 27 per cent with a total of 114,000 passengers travelling on Asian flights. Source: www.asiatraveltips.com April 1, 2010
- SAS Scandinavian Airlines, the national carrier of Denmark, Norway and Sweden, which flies a thrice-weekly Dubai-Copenhagen service during the winter season, is offering a special deal of AED3,350 (plus taxes and fees) in its premium economy class. Source: www.asiatraveltips.com/news February 3, 2010
- Scandinavian airline SAS has asked shareholders for USD\$672 million to keep it flying and has reported a bigger than expected quarterly loss. Source: Reuters February 9, 2010

6. Key Campaigns and Activities in Market

January to March campaigns and activities				
START DATE	END DATE	DESCRIPTION	TARGET AUDIENCE	PARTNERS
July 2009	June 2010	<p><i>International Media Hosting Programme (IMHP)</i>: Tourism Australia continues to pitch stories to media, arranging visits to Australia for print/online/broadcast channels in return for destination coverage. In the January-March period the following visits were delivered:</p> <ul style="list-style-type: none"> • <i>Escape 360</i> magazine and <i>Vagabond</i> magazine travelled on a group press trip to the NT and QLD to write Aboriginal/Outback/Coastal Lifestyle features 	Nordic First Time Experience Seekers	Various airlines, STOs and industry partners
January 2010	March 2010	<p><i>Resflex</i>: Online promotion on www.resflex.se and in the TUR print edition of Resflex to promote the new Aussie Specialist Program.</p>	Swedish Travel Trade	Resflex
16 March 2010	18 March 2010	<p><i>European New Product Workshop</i>: A three day in-market briefing and workshop event for Australia's new tourism product and product managers from key wholesalers and tour operators across the European markets</p>	Trade	DAP

April to June campaigns and activities				
START DATE	END DATE	PROJECT/EVENT	TARGET AUDIENCE	PARTNERS
April 2010	June 2010	<i>International Media Hosting Programme visits:</i> <ul style="list-style-type: none"> • <i>Stand By</i> magazine is travelling to ATE (SA) 	Nordic First Time Experience Seekers	Various airlines, STOs and industry partners
2 May 2010	16 May 2010	<i>Corroboree 2010:</i> Training event for 300 Aussie Specialist Travel agents from across Europe. Workshops with Australian industry on 5 to 8 May in Melbourne followed by famils throughout Australia (22 itineraries in total).	Aussie Specialist travel agents throughout Europe	Qantas; Tourism Victoria; State & Territory Tourism Organisations; Australian tourism industry
10 June 2010	19 June 2010	<i>Qatar Airways famil:</i> Eight travel agents from the Nordic region will travel to Victoria and Tropical North Queensland with Qatar Airways to showcase the regions and the new service from Stockholm to Melbourne.	Nordic travel agents	Qatar, Tourism Victoria, Tourism Queensland