

# Sweden - travel and tourism: Volume growth driving the market (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

Sweden shares borders with Norway, Finland and Denmark and comprises forests, lakes, mountain ranges, and historical sights. Having such geographical heritage, domestic tourism dominated the sector; a trend set to continue over the forecast period (2017-2021). Although international arrivals were below the regional average, they are forecast to improve due to an increase in disposable income.

Leisure is the primary purpose of travel and Sweden's passenger airlines market and in 2016 was in line with the regional average in terms of seats available. However, it will record growth owing to an influx of domestic and international arrivals.

MarketLine Premium's industry reports provides a comprehensive overview and include sections on risk and reward, key industry trends and drivers, SWOT analysis, industry benchmarking, competitive landscape, industry innovation, deals and key developments.

### KEY HIGHLIGHTS

Economic growth to foster domestic trips and tourism campaigns to drive international arrivals

In Sweden, domestic trips accounted for 64.1% of all trips taken in 2016, recording a

CAGR of 6.7%, from 44.5 million in 2012 to 57.7 million in 2016. This was primarily driven by a marketing strategy initiated in collaboration with Airbnb, the government's sustainable destination development program 2012-2015, the Freedom to Roam campaign, and a tax deduction. International arrivals accounted for 14.5% of total trips in Sweden.

Increase in domestic and international travellers to drive growth

Total revenue generated from hotels reached US\$3.9 billion in 2016 after a decline of -1.1% during the review period due to price wars. Revenue will post a forecast-period CAGR of 4.9% to reach US\$4.8 billion in 2021.

Growth international and domestic trips fuelled by LCCs

Total passenger airlines revenue increased at a CAGR of 0.8%, from US\$4.7 billion in 2012 to US\$4.8 billion in 2016. The load factor for passenger airlines rose from 69.5% in 2012 to 75.3% in 2016 and will reach 81.1% in 2021 due to a rise in number of trips for leisure and business purposes.

## SCOPE

**Risk & Reward Index** - The Risk & Reward Index compares the lucrativeness of the Swedish travel and tourism industry with other countries in the region via a set of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including revenue and expenditure in key segments and trends driving market performance.

**Industry SWOT Analysis** - Discover the strengths, weaknesses, opportunities and threats impacting market performance.

**Industry Benchmarking** - Benchmarks the Swedish travel and tourism industry's performance against regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, travel intermediary revenue, and tourism expenditure growth.

**Competitive Landscape** - Overview of players in the Swedish travel and tourism

industry, specifically airlines, hotels and car rental companies split by category and compared against their peers across a set of relevant industry indicators.

## REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Swedish travel and tourism industry compared to other countries in the Europe?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Swedish travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Swedish travel and tourism industry?

What are the Swedish travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Swedish travel and tourism industry?

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