Tourism in northern Sweden
Experience the opportunities in unique surroundings
TOURISM IN SWEDEN
Why Sweden for tourism investments?

- Tourism is the fastest-growing industry in Sweden
- Sweden is ranked nine in the world for Travel and Tourism competitiveness
- Sweden has unique, beautiful and unexploited natural environments
- Sweden has a rich cultural heritage

1. World Economic Forum 2013
More reasons for Sweden

- There is a large increase in international visitor volumes
- There is a demand for new products and services, e.g. hotels and activities
- Sweden has good infrastructure, low cost airlines and regular flights
- Sweden has a stable, well-performing and growing economy
Tourism in Sweden

• International travelling + 110% (1995-2012)\textsuperscript{1}
  - Europe + 85%
  - Sweden + 120%

• Sweden is the Nordic country with most international guests

• Tourism turnover in Sweden
  SEK 284.4 billion, +3.9% (2013)\textsuperscript{2}
  - Goal to reach SEK 500 billion in 2020

• The tourism sector in Sweden is 3% of GDP compared to the EU average, 6%

\textsuperscript{1}UNWTO, World Tourism Organization
\textsuperscript{2}Swedish Agency for Economic and Regional Growth
Target groups for Sweden

• Active Families
• Double Income, No Kids (DINKs)
• Wealthy, Healthy Older People (WHOPs)
• The Global Company (MICE)
TOURISM IN VÄSTERBOTTEN
Reasons to invest in tourism in northern Sweden

• An exotic, attractive and fast growing destination
• Great demand for high quality accommodation hotels and lodges
• Market opportunities for activity companies offering new experiences.
• Excellent opportunities for ski resort development
• A service minded culture characterized by courtesy
Tourism growth in Västerbotten

### Nights spent

<table>
<thead>
<tr>
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<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Västerbotten province</td>
<td>+6%</td>
<td>+6.1%</td>
<td>-0.8%</td>
<td>+2.0%</td>
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<tr>
<td>Sweden</td>
<td>+2.7%</td>
<td>+0.4%</td>
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<td>+2.2%</td>
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### International markets

<table>
<thead>
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<th>2011</th>
<th>2012</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Västerbotten province</td>
<td>+13.1%</td>
<td>+12.5%</td>
<td>+2.6%</td>
<td>+3.5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>+5.4%</td>
<td>-0.5%</td>
<td>-3.6%</td>
<td>-1.9%</td>
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</table>

**Total tourism turnover:** 7.54 Billion SEK (850,400,000 €)

**Employs 5,000 people on a yearly base (2% of population) 2012**

During June, July and August compared to the same period 2013, the total accommodation revenue at hotels, holiday villages and youth hostels in Västerbotten increased by +13.9%. That is the second highest increase in the whole country.
Target groups for Västerbotten

Extreme skiers
Adventure seekers
Health and Wellness travels
Meetings and Incentives
Extended business trips
4 Distinct seasons

Winter

Summer

Spring

Autumn
Skiing

- Västerbotten offers skiing for everyone: families, pros, off-piste skiers, snowboarders and cross-country skiers
- 28 ski-slopes, ranging from mom-&-pop-slopes to full scale ski-resorts
- The village of Tärnaby is where Swedish skiing legends, Ingemar Stenmark and Anja Pärson grew up and it is where Sweden’s alpine stars train for the next season
- Areas for Ski resort development available
The Sami

The Sami are one of the world’s indigenous peoples, around 70 000 Sami are spread out in four countries: Russia, Finland, Norway and Sweden. This large land area is called Sápmi.

- In Sweden there are 20 000 Sami.
- 10% of the Sami in Sweden are employed in reindeer husbandry.
- Traditional Sami trades also include handicrafts, hunting and fishing. More recent trades include tourism, media, art and music.
Hunting in Swedish Lapland

The last wilderness area in Europe
- Northern Sweden offers perhaps Europe's best conditions for hunting grouse and moose.
- A growing interest from hunters from all over the world to come and experience the wild hunt of the north.
Fishing in Swedish Lapland

Västerbotten has fishing waters for everybody, beginners and pros. A number of the fishing waters are internationally renowned and entice crowds of Swedish and foreign tourists to visit every year.

Fly fishing under the midnight sun
Food and culinary experiences

- Västerbotten’s fantastic countryside and nature supply unique products that create extraordinary culinary experiences:
  
  - Reindeer and elk, salmon and salmon trout, grouse, chanterelles, cloudberries, lingon- and bill berries
  
  - The amazing Västerbotten Cheese, the favorite among many starred chefs the world over, and often served at gala dinners such as the Nobel Dinners

- Food tourism in Västerbotten is still under explored and there are vast opportunities for the right actor
Music & Culture

• Västerbotten offers a wide range of cultural activities, opera, festivals, theatre, movie and festivals etc. It is a region with a great urge to express itself.

• Umeå is the European Capital of Culture 2014

• The band Refused is as great a music export as ABBA
Largest markets
Guest nights spent in Västerbotten

Guest nights from largest markets 2013

- Sweden 1 190 873
- Norway 239 522
- Germany 31 969
- Finland 27 864
- Poland 11 021
- Not specified 8 543
- USA 5 961
- Denmark 5 494
- Great Britain 5 052
- Netherlands 5 002
Accommodation alternatives in Västerbotten

- Guest nights by type of establishment
  - Hotel 84%
  - Holiday Village 9%
  - Youth Hostel 7%

- Category of guests staying at hotels in Västerbotten
  - Business 56%
  - Leisure 24%
  - Group 13%
  - Conference 7%

Accommodation capacity – Dec 2013 and Dec 2012

<table>
<thead>
<tr>
<th></th>
<th>Hotel</th>
<th>Holiday Villages</th>
<th>Youth Hostels</th>
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<tr>
<td></td>
<td>No.</td>
<td>Rooms</td>
<td>Beds</td>
<td>No.</td>
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<tr>
<td></td>
<td>62</td>
<td>3 468</td>
<td>7 501</td>
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<tr>
<td>2012</td>
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<td>3 455</td>
<td>7 614</td>
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Investing in your future

EUROPEAN UNION
European Regional Development Fund

Regional Partner
THE SWEDISH TRADE & INVEST COUNCIL
Main reason for travel

Source: Swedish Agency for Economic and Regional Growth - Tillväxtverket
Ten most frequent activities

Source: Swedish Agency for Economic and Regional Growth - Tillväxtverket
Type of accommodation in Sweden

![Bar chart showing the percentage of business travelers using different types of accommodation in Sweden from 2011 to 2013. The chart indicates that hotel/pension is the most popular choice, followed by rented home/apartment/cottage and family/friends.]

Source: Swedish Agency for Economic and Regional Growth - Tillväxtverket
Type of accommodation in Sweden

Source: Swedish Agency for Economic and Regional Growth - Tillväxtverket
Infrastructure - it’s easy to get to Västerbotten

- The region has six airports and 260,000 people – one hour to Stockholm
- Three European highways runs through the province
- Excellent road connections
- Two north-south railroads and 1 east-west railroad
- Two deep sea ports and a ferry line to Finland
- World-renowned mobile and fiber-based broadband with extensive GSM and 3G network coverage.
Investment opportunities in Västerbotten

- **Tourism is expected to double until 2020**
  Large investments in accommodation, ski resorts, city hotels, activity companies and infrastructure required

- **Opportunities for;**
  Property developers, real estate investors, activity companies, hotel and accommodation companies, food tourism, travel operators, tourism entrepreneurs, etc.
Västbotten offers

Types of investment:

- Strategic alliance
- Joint venture
- Shared product development
- M&A
- Swedish R&D center
- Nordic sales and support
- Branch office
- Regional HQ

How VIA can assist:

- Arrange investor meetings
- Identify opportunities
- Find syndication partners
- Matchmaking
- Market and industry info
- Establishment support
Next steps

• **Define:** You specify what you are looking for. Specific sector, type of investment, preferred type of company or partnership, etc.

• **Search:** We use our network to find options for you. Could be companies to partner with, IP to acquire, R&D projects to join...

• **Meet:** We set up meetings for you with Swedish companies.
  - *On location in Sweden*
  - *By phone or online video conference*
Västerbotten Investment Agency (VIA) is a regional investment promotion agency dedicated to make the Västerbotten province the most attractive choice for foreign investors and companies thinking about establishing or expanding their business operations in North Sweden.

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