

BART - Public-Private Partnership in Barents Tourism

Kick-off meeting in Rovaniemi 16th-17th March 2011

BACKGROUND OF TOURISM DEVELOPMENT IN SWEDISH LAPLAND

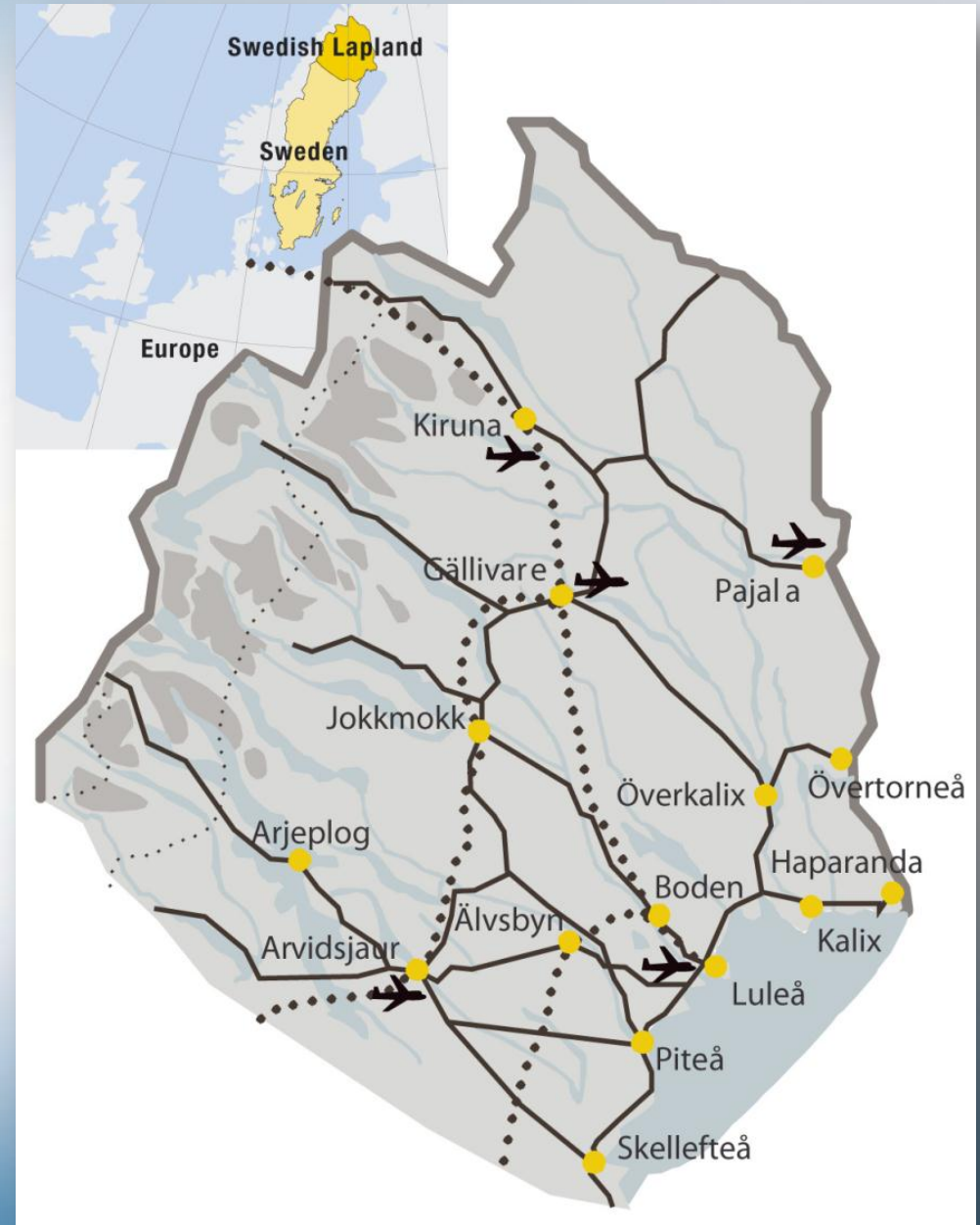
Dr. Hans Gelter

**Dept. of Arts, Communication and Education
Luleå University of Technology**



Destinations

- Piteå Presenterar
- Vildmarksälven i Älvsbyn
- Destination Arctic Circle
- Visit Luleå
- Boden Turism
- Destination Jokkmokk
- Visit Gällivare
- Kiruna Lappland
- Heart of Lapland
- Destination Skellefteå



1. Current annual economic facts & figures (statistics) of the region

Tourism industry business units:

About 550 Tourism business in 2009

(Data: Jan-Erik Jaensson, Swedish Lapland)



1. Current annual economic facts & figures (statistics) of the region

Tourism industry turnover:

3,37 billion SEK 2009

50% increase from 2003 (2,24 billion SEK)

(Data: Jan-Erik Jaensson, Swedish Lapland)



1. Current annual economic facts & figures (statistics) of the region

Tourism industry turnover:



OMSÄTTNING PER KATEGORI OCH TOTALT

(i miljoner kr)	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Förändr. fr 2001 %
Hotell	485	615	450	423	501	672	732	753	1 059	1 168	1 127	+166
Stugbyar	93	96	118	131	143	132	129	134	139	157	121	-7,6
Camping	198	128	109	140	163	174	172	185	240	225	189	+35
Vandrarhem	7	8	8	9	26	28	26	30	32	33	41	+356
Stuga/Rum	229	119	128	148	109	91	134	106	91	94	81	-45
Släkt/vänner	320	432	454	347	373	546	577	599	457	390	427	+23
Fritidshus	81	103	155	126	149	211	220	105	183	166	151	+20
Övrig övernattnng	137	163	80	55	136	74	124	142	88	56	46	-16
Dagbesök	627	323	388	401	475	311	491	364	255	480	663	+65
TOTALT	2 177	1 987	1 890	1 780	2 076	2 240	2 605	2 419	2 545	2 767	2 847	+60
Andel av Sverige	4,04%	3,65%	3,64%	2,98%	2,94%	2,95%	3,31%	3,19%	3,20%	3,47%	3,43%	+15

TEM Mätning: Samhällsekonomisk effekt 444 miljoner (år 2009)

1. Current annual economic facts & figures (statistics) of the region

Tourism industry man-year:

2500 man-year 2009

21% increase since 2003 (500 persons)

(Data: Jan-Erik Jaensson, Swedish Lapland)



1. Current annual economic facts & figures (statistics) of the region

Registered tourist overnights:



2,3 million guest nights
(of which 762.000 are camping guests)
25% foreign guests



(Data: Swedish Lapland)

1. Current annual economic facts & figures (statistics) of the region

Total amount of annual tourist arrivals:

% 2009-10 Total no tourists 2010

•Kiruna	+ - 0	358661
•Luleå	- 2	242775
•Piteå	- 1	153518
•A-kommunerna	+ 1	139970
•Skellefteå	+ 2	127718
•Heart of Lapland	+10	129877
•Gällivare	+ 5	82243
•Jokkmokk	- 9	67154
•Boden	+12	38535
• TOTAL Swedish Lapland		1340451

The Swedish
market share
increased 14% in
2008-2009



(Data: Swedish Lapland)



1. Current annual economic facts & figures (statistics) of the region

Total amount of annual tourist arrivals:

Nationality (exclusive camping)	% 2008-09	Total no tourists 2009	
• Sweden	- 7	1 031 920	(75%)
• Norway	+17	132 345	
• Germany	+11	60 773	
• Finland	+22	41 811	25% foreign guest nights =
• UK	- 12	21 421	4th International
• France	+ 3	13 670	destination in Sweden
• Denmark	- 3	7 816	
• Italy	+67	6 900	
• USA	+ - 0	5 998	
• The Netherlands	- 11	5 599	
• Spain	+14	5 032	
• Russia	- 7	4 291	
• Japan	+58	4 270	

(Data: Swedish Lapland)

2. Remarks on the regional tourism strategies and development

Current state of strategic tourism development:

1) Strategic local destination development according to the Graffman KraftProcessen™ Process completed in most destinations.

Kraftmodellen™



KraftProcessen™ – frågor och uppmaningar



2. Remarks on the regional tourism strategies and development

Current state of strategic tourism development:

2) Implement the Swedish National Strategy (by Visit Sweden) with the intention to increase tourism export and double tourism turnover in 10 years. (Source: Jan-Erik Jaensson, Swedish Lapland)

Vision och mål 2020 Nationella strategin



Omsättning	2010	2015	2020
	252 000 0000	350	500
Exportvärde	94 000 000	150	250
Sysselsatta i antal årsverken	160 0000	200 000	300 000
Exportmogna destinationer		25	35



Urban Nature
Swedish Lifestyle
Natural Playground
Vitalised Meetings

Visit Sweden Market strategy:

1) The Global Traveler - well traveled, well educated, wealthy:



DINK's – Double Income No Kids

Experienced travelers, limited time, individualistic, image.



WHOP's – Wealthy Healthy Older People

Culture & nature experiences, learning.



Active Family – Wealthy, active traveling family

Largest segment, strong economy, seek security and family activities

2) The Global Company



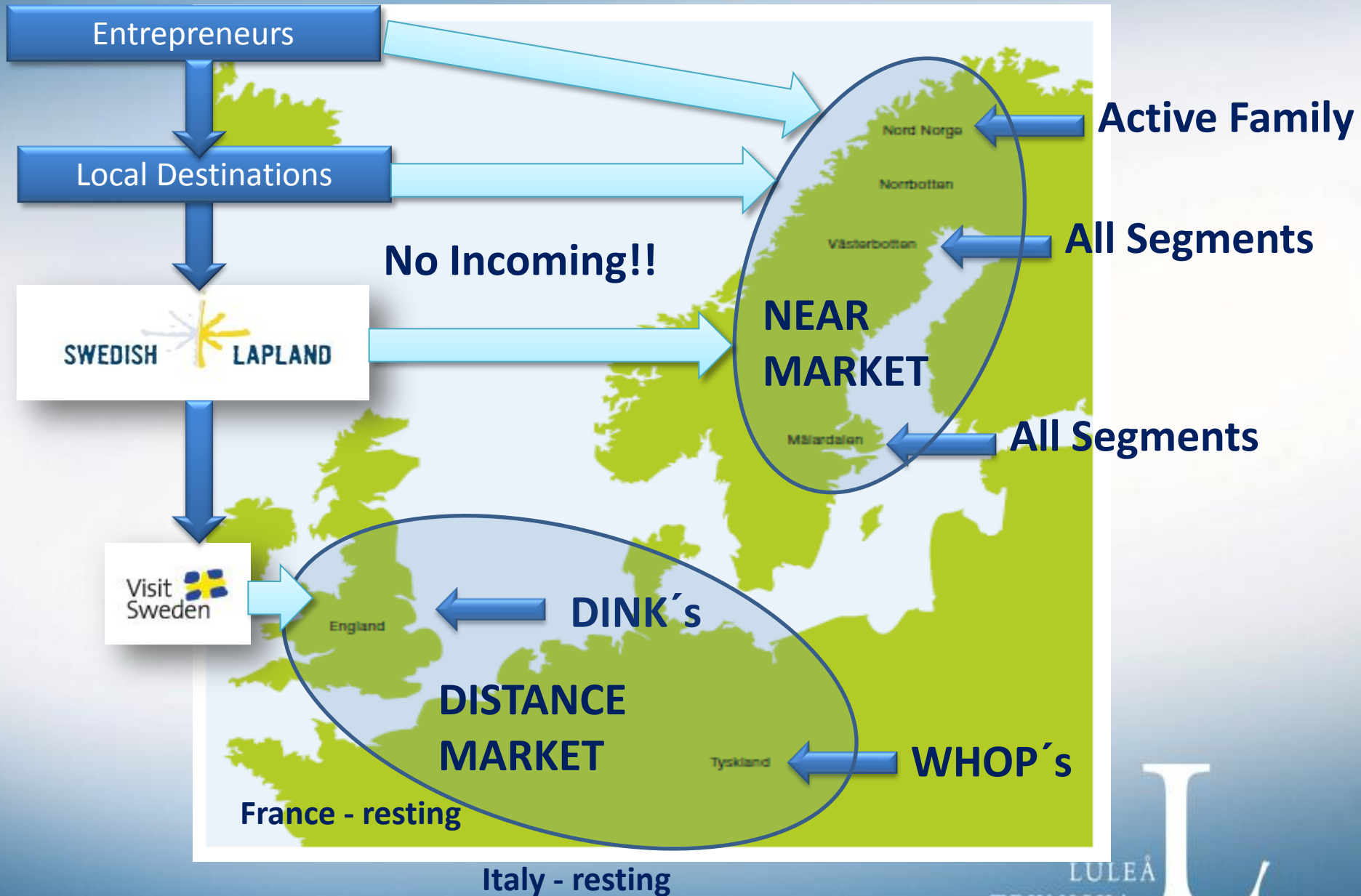
Cooperate Meetings – B2B opportunities



Visit Sweden, 2008



Market Strategy & Priority



2. Remarks on the regional tourism strategies and development

Current state of strategic tourism development:

2) Focus in implementing this strategy will be to increase the number of export ready products and tourism businesses and destinations.

. (Source: Jan-Erik Jaensson, Swedish Lapland)

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2. Remarks on the regional tourism strategies and development

Current state of strategic tourism development:

2) Increase the number of export ready products and tourism businesses by **improving tourism business quality**.



Tourist firm sustainability certification - Productification



Eco tourism product certification



Sveriges Guideföbund

Guide certification

“Värdskap” – Hospitality - Hostmanship

ICT competence & on-line sale

2. Remarks on the regional tourism strategies and development

The three most important strategic guidelines for development:

1. Increase tourism export
2. Increase coordination & effectiveness in cooperation between companies and between destinations in the region
3. Attracting risk capital for investments in tourism and infrastructure

(Source: Jan-Erik Jaensson, Swedish Lapland)

2. Remarks on the regional tourism strategies and development

Key organizations and actors in tourism development:

1. **Swedish Lapland** – Regional destination organization
2. **Local destination organizations** (*Visit Luleå, Piteå Presenterar, Heart of Lapland* etc.) & **Municipalities**
3. **Swedish Agency for Economic and Regional Growth** “Tillväxtverket” – stimulate and support enterprises and business
4. **County Administrative Board** “*Länsstyrelsen*” - EU-Interreg projects, Business sponsoring
5. **County Council** “*Landstinget*” – Cultural & Business development
6. **Swedish Rural Economy and Agricultural Societies** “*Hushållningssällskapet*” – Stimulate nature-based and agricultural tourism
7. **The federation of Swedish Farmers LRF-** “*Lantbrukarnas Riksförbund*” – Stimulate Agricultural experiences and tourism
8. **Luleå University of technology** – Research & Development
9. **ALMI Företagspartner AB** – Risk capital, financing, counselling
10. **Swedish Travel and Tourist Industry Federation RTS** “*Rese och Turistnäringen i Sverige*” – business & development projects

2. Remarks on the regional tourism strategies and development

List 3-5 most important ongoing tourism projects:

According to Swedish Lapland:

1. Partnership with Visit Sweden in marketing
2. Direct airlines from abroad to Kiruna
3. Direct airlines from abroad to Luleå
4. Partnership in Meetings & Incentive with Destinations Stockholm, Malmö/Skåne and Göteborg/Västra Götaland

(Source: Jan-Erik Jaensson, Swedish Lapland)

2. Remarks on the regional tourism strategies and development

List 3-5 most important ongoing tourism projects:

According to **County Council** "*Landstinget*" :

1. Prevent local destination competition by developing Swedish Lapland organization, and to allocate resources to marketing the region instead of local municipalities
2. Developing communication infrastructure (train, airlines, roads, ship lines) in the region and in the Kolarctic area
3. Direct airlines from Europe for short break visits
4. Developing a common on-line booking system for the whole destination for the whole tourism spectra (communication, lodging and activities)
5. Developing the structure and efficiency of EU Structure Founding and attracting risk capital to upgrade tourist facilities and attractions.

2. Remarks on the regional tourism strategies and development

List 3-5 most important ongoing tourism projects:

According to me:

1. Spaceport Sweden, Kiruna. Virgin Galactic
2. Tree Hotel, Haralds
3. Stoon Moose
4. Bothniabanan – sustainable transports

Virgin Galactic Arctic Spaceport Sweden - Kiruna



2012



Sir Richard Branson

Spaceport Sweden
open for business

ABOUT US SERVICES INFRASTRUCTURE ADVENTURES NEWS MEDIA GALLERY CONTACT US HISTORY LINKS

OUR MISSION

The aim of Spaceport Sweden is to become Europe's first and most obvious place for personal suborbital spaceflights. Spaceport Sweden is based in Kiruna, a modern city with excellent communications and extensive infrastructure in the unique northern Scandinavian wilderness. Our spaceflights go right through the Aurora - the northern lights!

Welcome to contact us!

NEWS

2008-01-23
Spaceport Sweden's report from the unveiling of the new SpaceShipTwo Virgin Galactic's spaceship - now we know what it looks like! A report from the unveiling in New York City 23 January 20...

2007-10-24
Spaceport Sweden attend the New Mexico Spaceflight symposium
On October 24 & 25, 2007, Ole Rikberg and Bengt Jönsson represented Spaceport Sweden at the International Space...

FIRST FLIGHT

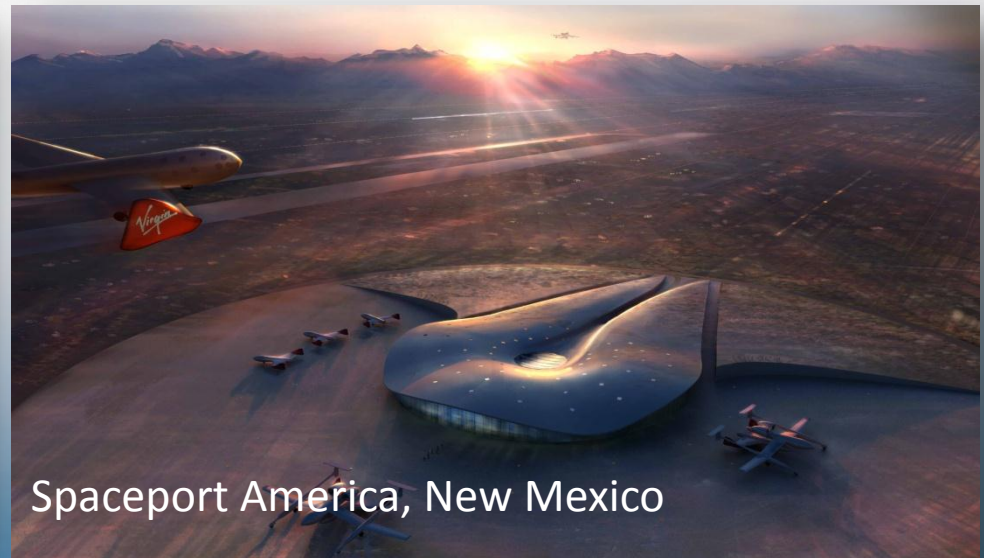
2012 we will give ordinary people the opportunity to become non-professional astronauts by taking off from Spaceport Sweden. We will do this together with Virgin Galactic, the world's first commercial space line, as they have chosen Spaceport Sweden as their unique winter play ground.

[Book your flight!](#)

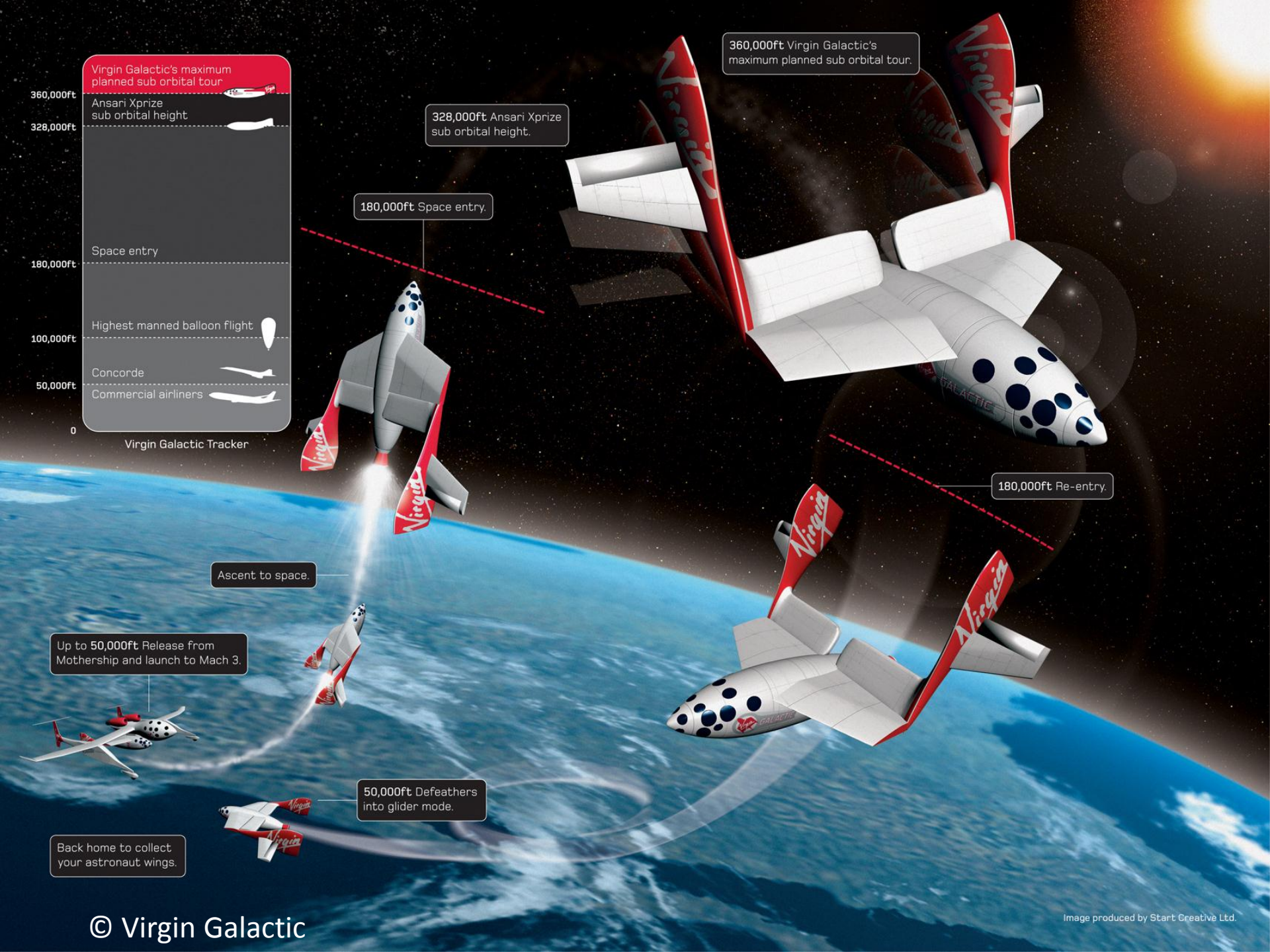
[Download our brochure!](#)

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www.ssc.se



Spaceport America, New Mexico



Virgin Galactic's maximum planned sub orbital tour

360,000ft

Ansari Xprize sub orbital height

328,000ft

328,000ft Ansari Xprize sub orbital height.

180,000ft Space entry.

Space entry

180,000ft

Highest manned balloon flight

100,000ft

Concorde

50,000ft

Commercial airliners

0

Virgin Galactic Tracker

360,000ft Virgin Galactic's maximum planned sub orbital tour.

180,000ft Re-entry.

Ascent to space.

Up to 50,000ft Release from Mothership and launch to Mach 3.

50,000ft Defeathers into glider mode.

Back home to collect your astronaut wings.

© Virgin Galactic

Image produced by Start Creative Ltd.



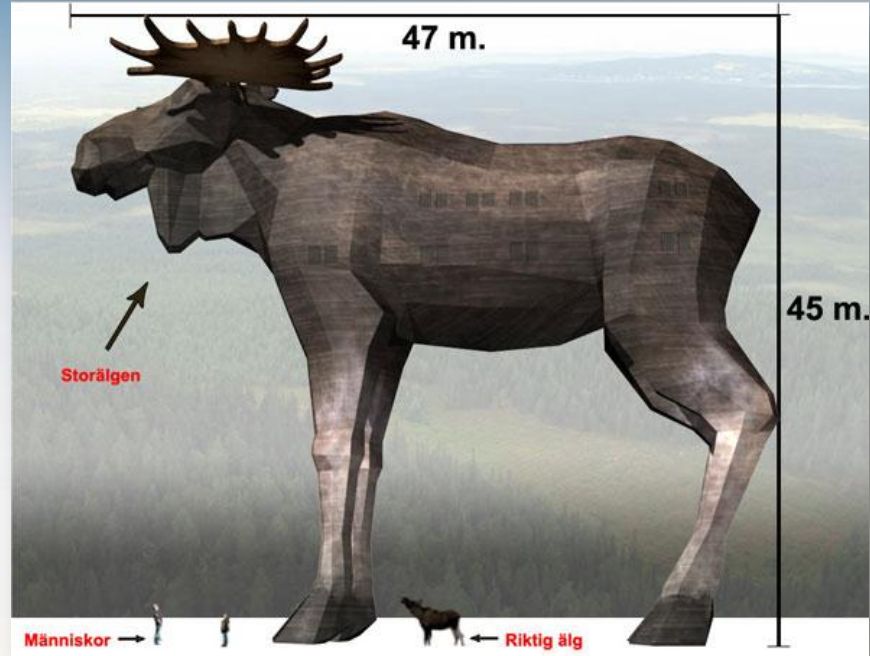
Tree Hotel Harads





Vy från Rörträsk

Stoorn, Västerbotten

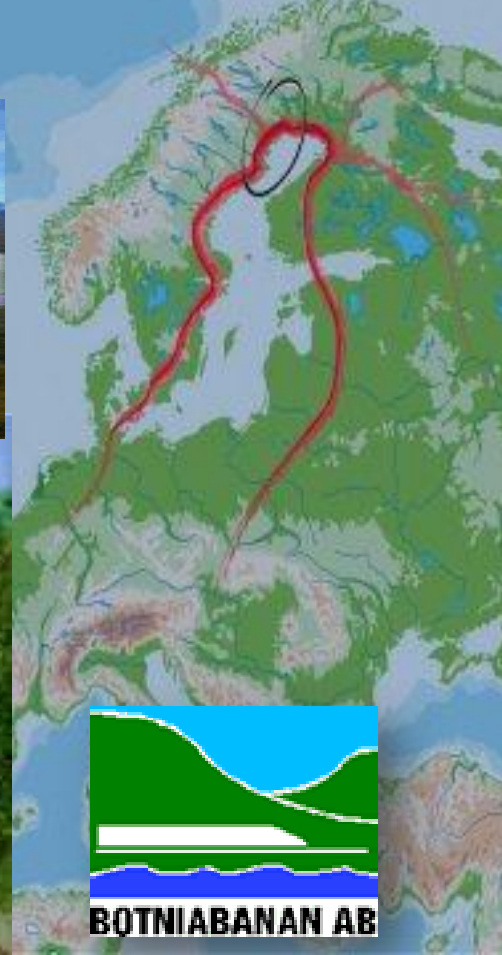




FUTURE?



Bothniabanan AB



3. Overall description of the tourism industry

What is the current state of the field in our region?

1. Weak connections academy (research) – business
2. In Northern Sweden weak tourism research & Education
3. Increased tourism – but lack of qualified personnel (higher education) (Regionala beredningsgruppen 2009, others)
4. Weak association (in Sweden) of tourism to the Sami Culture (Regionala beredningsgruppen 2009, others)
5. Low degree of sustainability and environmental concern (few eco-certificated business)
6. Weak infrastructure for communication

3. Overall description of the tourism industry

What are the three distinctive characteristics that describe the companies of our region?

1. Increased profit
2. Cooperation between companies
3. Offering genuine experiences

(Source: Jan-Erik Jaensson, Swedish Lapland)

1. Many Micro companies, few SME's or big companies
2. Many “hobby companies” with low educational degree, and low activity (seasonality)
3. Unclear business plans and product offerings –not ready for export

3. Overall description of the tourism industry

What is the three absolute strengths of our region?

1. **Norway** – Astonishing landscape and natural tourism resources
2. **Finland** – professionalism in organization, processes and business
3. **Russia** – enormous potential for tourism development - exotism

3- Overall description of the tourism industry

What is the strength of the partner regions?

1. Genuine
2. Exotic
3. Profitability based on quality

(Source: Jan-Erik Jaensson, Swedish Lapland)

1. Exotism – Arctic environment
2. Genuine – real people
3. Security (against terrorism, natural disasters, etc.)

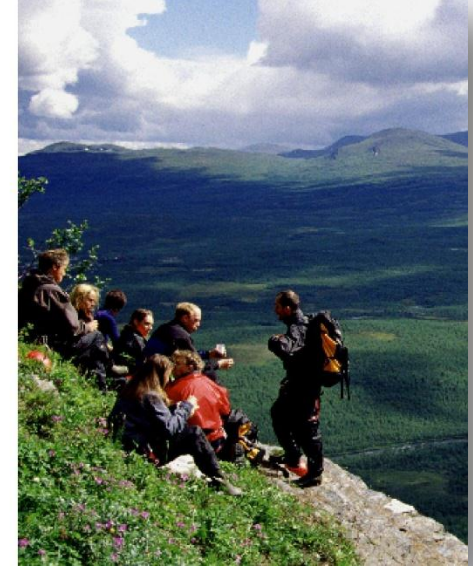
Core Values för Swedish Lapland



Authenticity



Contrasts



**Hospitality &
Hostmanship
(*värdskap*)**

Values of Swedish Lapland:

Natural (*Naturlig*)

Conciderate (*Omtänksam*)

Informal (*informell*)

Untamed (wild) (*Otämjd*)

Developer (*Utvecklare*)

Limitless (*Gränslös*)

3- Overall description of the tourism industry

What are the three major future challenges for the tourism industry in our region?

1. Infrastructure
2. Infrastructure
3. Infrastructure, must become easier to get here by train and flight.

(Source: Jan-Erik Jaensson, Swedish Lapland)

1. Environmental impact and costs of transportations.
2. Too many tourists - Disneyfication
3. Innovation

3- Overall description of the tourism industry

What definite expertise and/or elements our institution brings to the joint pool of BART?

1. Competence about the Experience Economy, Experience Production and Transmodern tourism.
2. Competence in sustainable and Eco-tourism.
3. Competence and experiences of micro-business reality in tourism.
4. Benchmarking competence and experience around the world.
5. Local and international networks in tourism research ad business.

Thank You for Your Attention!

www.ltu.se/mme

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