

Welcome to the Nordic Networking Voyage



NORDIC TOURISM COLLECTIVE

ETOA

Event Sponsors

Headline Sponsor



Venue & Hosting Sponsor



Lunch Sponsor Reception Sponsor



Break Sponsors



NORDIC TOURISM COLLECTIVE

ETOA

Agenda

11:00	Welcome
11:15	Session 1 - 2022 Market update and recovery
12:00	Lunch Sponsored by GetYourGuide
13:00	B2B Networking 13 assigned one-to-one meetings
14:45	Break Sponsored by Liepaja region
15:00	B2B Networking Free-flow meetings
15:45	Break Sponsored by Savonlinna Travel
16:00	Session 2 - Tourism resource crisis
16:45	Closing Words
17:00	Conference programme ends delegate cabin check-in
18:30	Drinks Reception Sponsored by Profitroom
19:30	Dinner
22:00	End of Programme



Welcome

Paul Wagner & Andy Fairburn, Nordic Tourism Collective
Tom Jenkins, ETOA – European tourism association

Richard Stone, DFDS
Tarja Koivisto, Visit Finland



NORDIC TOURISM COLLECTIVE

ETOA

2022 Market update and recovery

s1



NORDIC TOURISM COLLECTIVE

ETOA

Agenda

- Current challenges
- Forecasts and data - 2022
- European markets
- Long-haul markets
- The wind behind us
- Winter 22/23
- Audience feedback and discussion



Ukraine

- Emotional impact
- Proximity to our Baltic and Nordic region
- Conflict is still in the early stages and constantly being fed to us
- Russian market itself was important to the region
- Destination Russia was also important to many markets
- Russian airspace
- Geographical naivety of Europe in the US market
- Humanitarian crisis

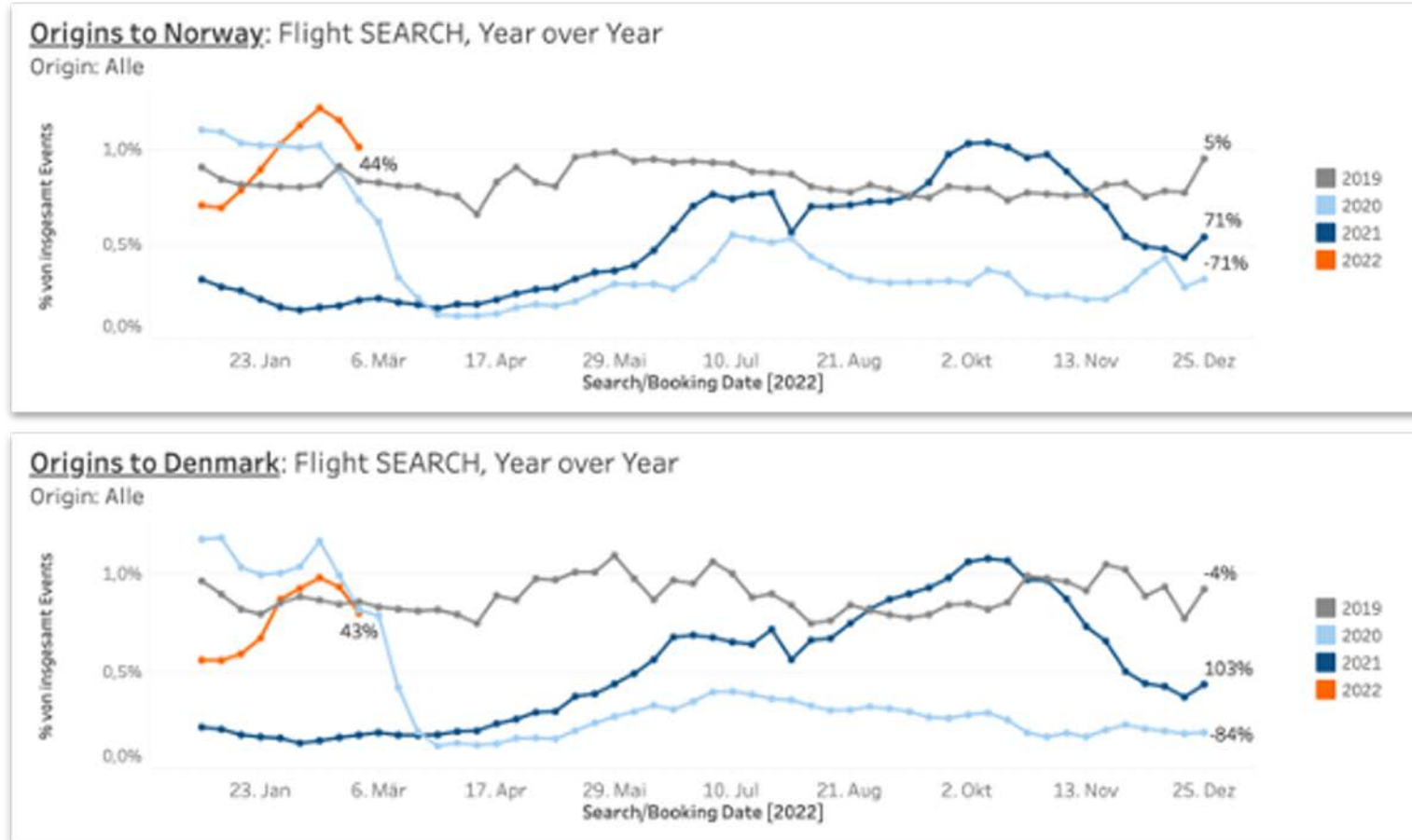


Other challenges

- Vaccine regulations in Europe
- Airline routes from some destinations
- Inflation/cost increases due to covid and rising oil and gas prices
- Anxious mentality due to 2 years of covid and new crisis
- Tourism resources (next session)



Forecast data - Norway and Denmark- 2022



Source: Sojern

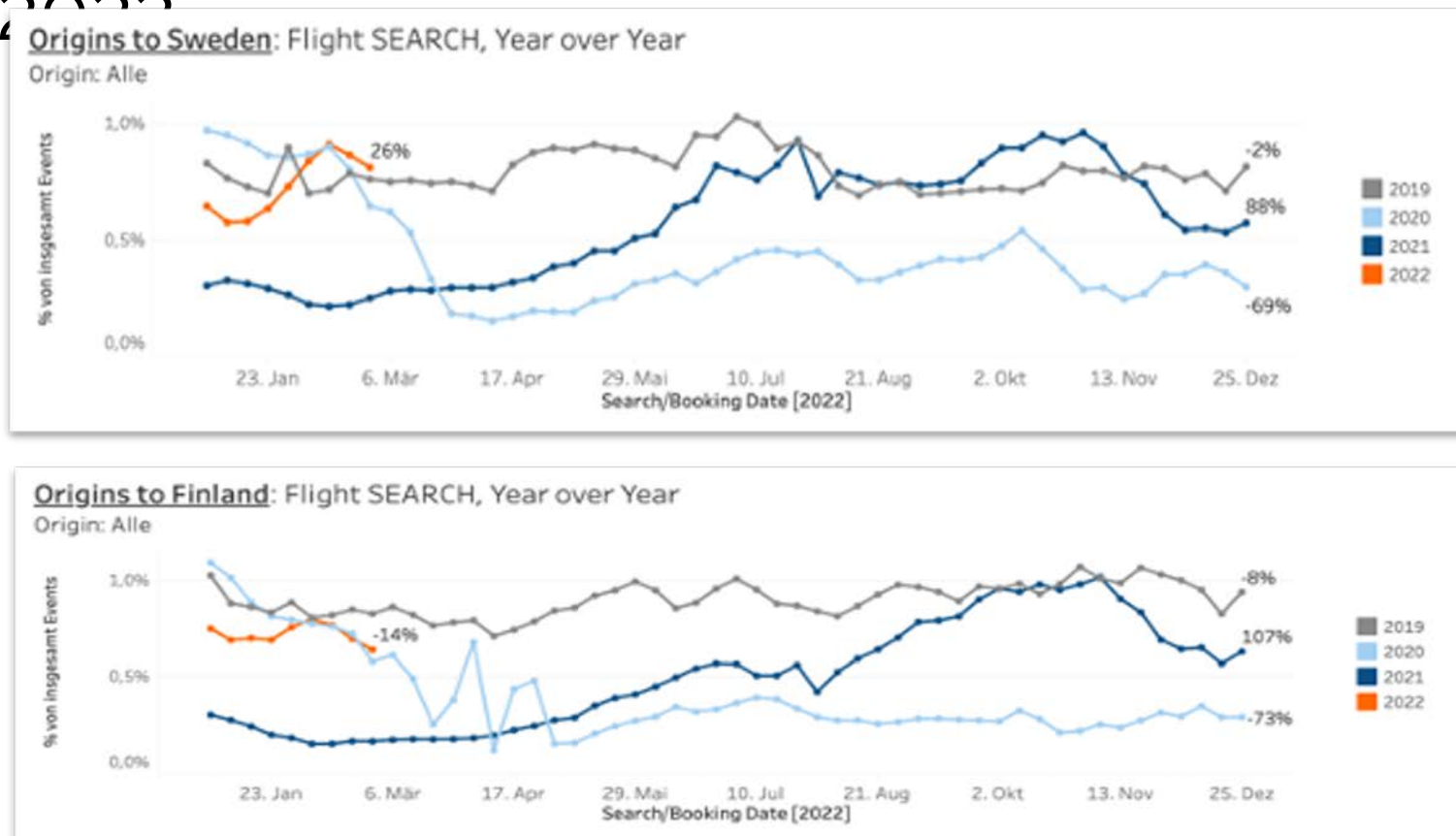


NORDIC TOURISM COLLECTIVE

ETOA

Forecast data - Sweden and Finland -

2022



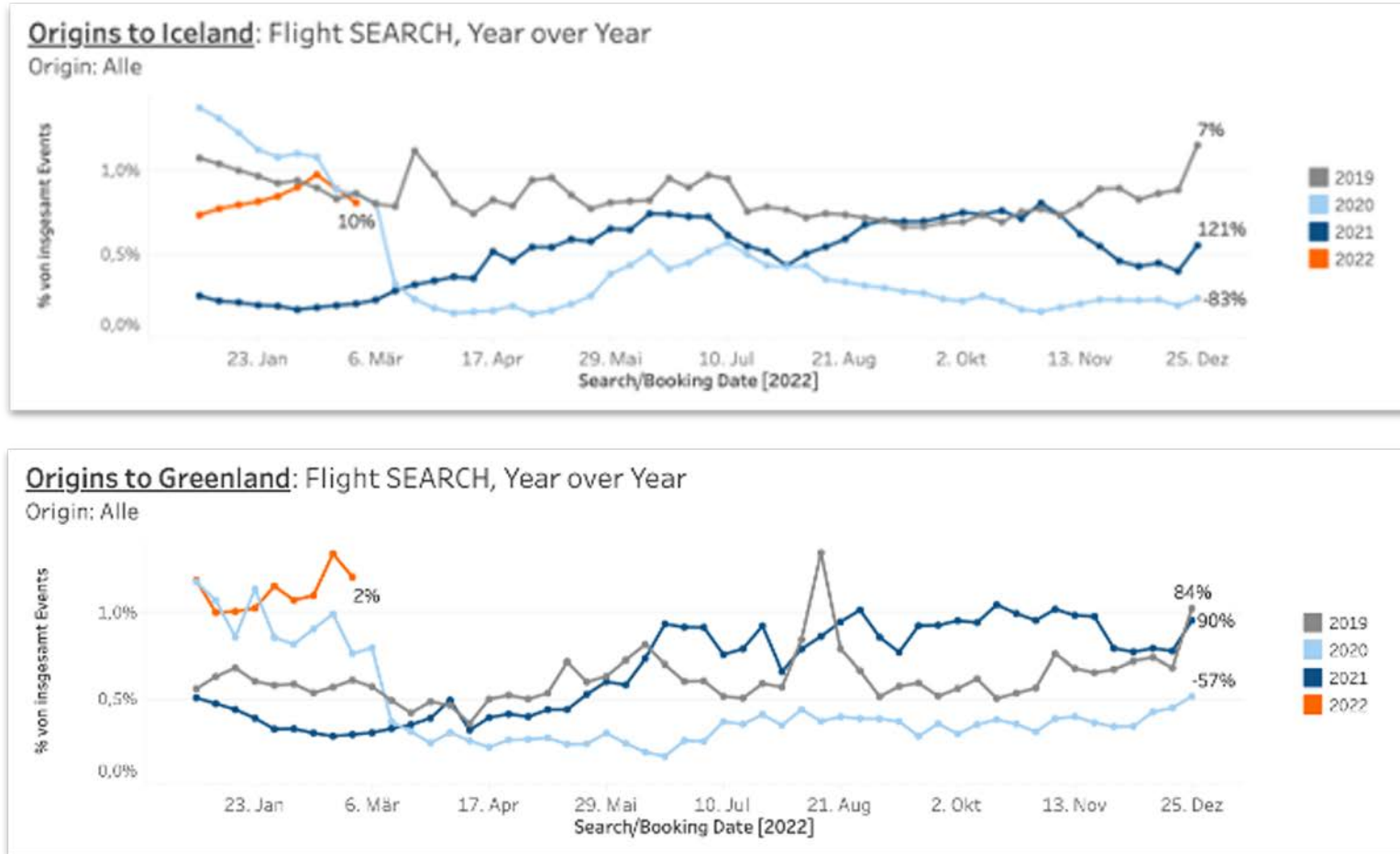
Source: Sojern



NORDIC TOURISM COLLECTIVE

ETOA

Forecast data- Iceland and Greenland - 2022



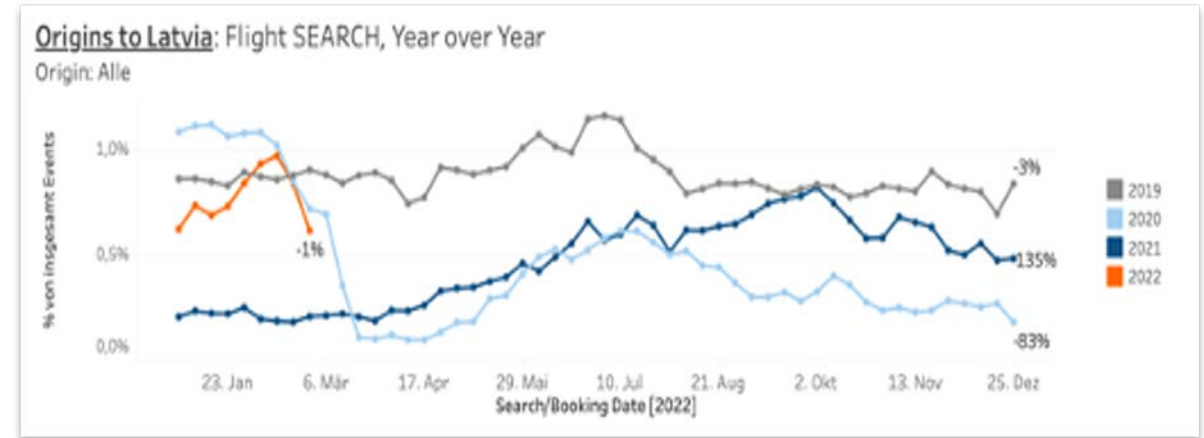
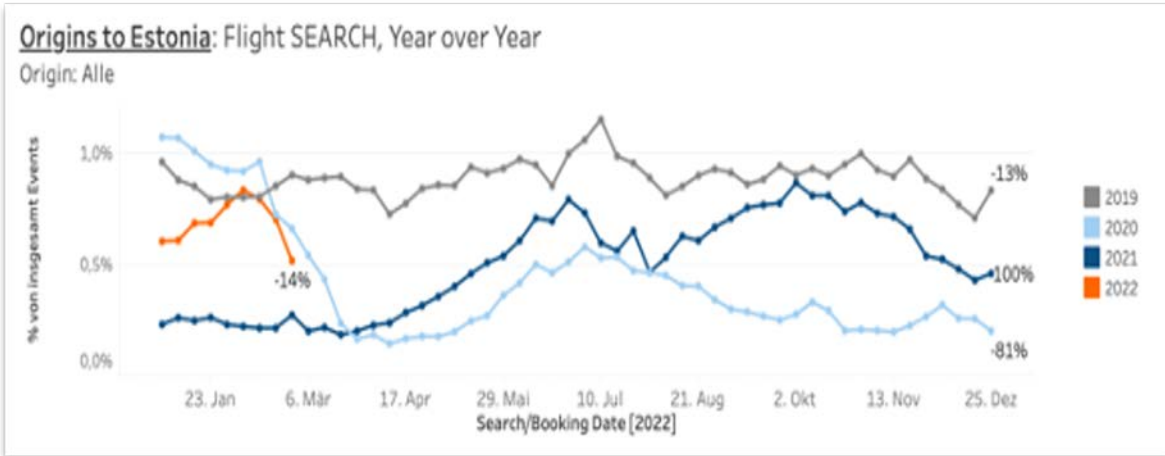
Source: Sojern



NORDIC TOURISM COLLECTIVE

ETOA

Forecast data - Baltics - 2022



Source: Sojern



NORDIC TOURISM COLLECTIVE

ETOA

Forecast data as of 10 March

Flight searches the Nordics

	% of Total	L7D vs L14D	L14D vs L28D	L30D vs L60D
Spain	11,6%	-13,4%	-22,5%	14,5%
Germany	12,3%	16,1%	-14,1%	5,6%
Italy	8,4%	9,7%	-21,9%	29,8%
United States	9,3%	11,9%	-10,3%	70,9%
France	7,8%	1,6%	-21,5%	0,6%
Norway	9,2%	-3,5%	-13,5%	45,0%
Sweden	5,3%	14,0%	-3,5%	75,5%
United Kingdom	6,4%	11,4%	-16,8%	17,5%
Greece	3,0%	-6,4%	-18,4%	-4,8%
Eastern Europe Other	2,9%	11,9%	-14,9%	2,5%

Flight searches the Baltics

	% of Total	L7D vs L14D	L14D vs L28D	L30D vs L60D
Germany	16,8%	28,6%	-38,6%	-12,8%
United Kingdom	17,3%	27,9%	-34,1%	2,3%
Italy	9,1%	3,4%	-45,8%	25,5%
Spain	9,3%	30,8%	-38,7%	1,8%
France	6,9%	17,8%	-38,5%	-19,1%
United States	4,1%	12,2%	-36,5%	55,2%
Norway	5,0%	4,0%	-41,8%	26,9%
Sweden	3,2%	15,4%	-31,6%	23,7%
Ireland	3,5%	58,1%	-30,3%	17,1%
Eastern Europe Other	2,4%	13,6%	-33,5%	3,4%

Source: Sojern



NORDIC TOURISM COLLECTIVE

ETOA

Markets returning in the shorter term

- Domestic
- Neighbouring markets - Nordic and Baltic

Other European

- Germany
- Benelux
- UK
- France
- Spain
- Italy

and

- USA - where they feel confident and safe
- South America



Asia - long haul markets

Short/Mid Term

- Singapore/Malaysia
- Australia
- India
- South Korea
- Thailand
- Indonesia
- Philippines

Mid term:

- Japan
- Taiwan

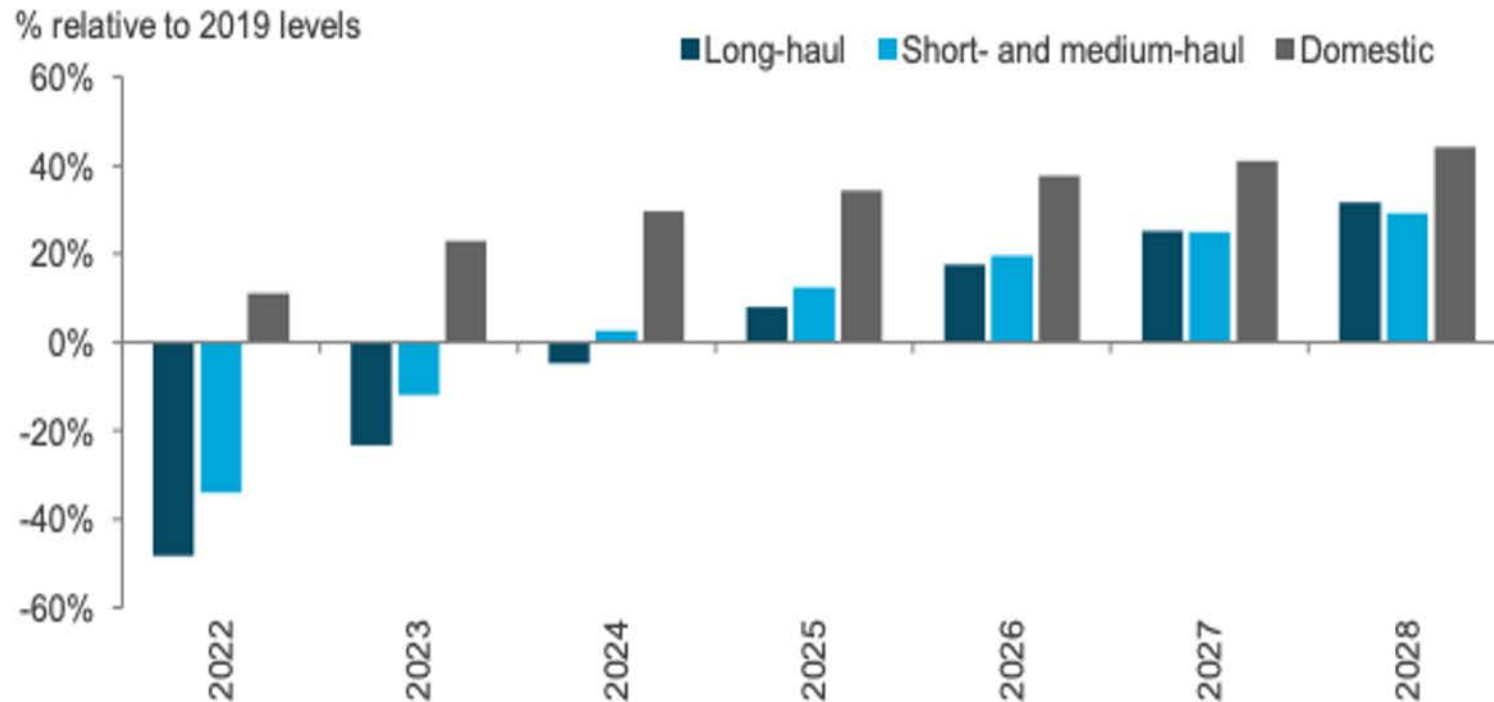
Long-term

- China
- Hong Kong



5 year forecast data

Global Overnight Visitors: Baseline Projections



Source: Tourism Economics



NORDIC TOURISM COLLECTIVE

ETOA

Data conclusions and observations

- Huge pent-up demand in all markets
- Current situation has stalled some travelling intentions
- Neighbouring, European and US markets looking the strongest
- Asia return is dependent on air routes and vaccine recognition
- Additional disposable income
- Higher inflation and cost of living
- After 2022 we may be in a much healthier situation



The wind is still behind us

- Covid restrictions are lifting rapidly
- Pent-up demand after 2 years of Covid
- Safety, health and hygiene reputation of the entire region
- Nature, open spaces, soft activities
- High quality destinations
- Excellent ferry routes from neighbouring markets
- Leaders in sustainable tourism, sooner or later, the key driver



Winter 2022/2023

- Additional flights
- High quality of winter destinations throughout the region
- Potential return of the long haul market
- Increased demand for sustainable destinations
- Hopefully a more friendly tourism environment



Up for Discussion! We would love to hear from you!

- Feedback from different suppliers on changes over the last month?
- Feedback from buyers as to changes in bookings
- Is there such thing as “Support tourism”
- Should our focus be on safety, nature and sustainability in 2022
- Situations change so quickly, resilience and adaptability is key
- Stay positive



Thank you

s1



NORDIC TOURISM COLLECTIVE

ETOA



Lunch Sponsor



13:00 Follow your agendas for the scheduled networking
Suppliers are seated, buyers visit them at the assigned time



NORDIC TOURISM COLLECTIVE

ETOA

Appointments



NORDIC TOURISM COLLECTIVE

ETOA

Event Sponsors

Headline Sponsor



Venue & Hosting Sponsor



Lunch Sponsor Reception Sponsor



Break Sponsors



NORDIC TOURISM COLLECTIVE

ETOA



Tourism resource crisis

s2



NORDIC TOURISM COLLECTIVE

ETOA

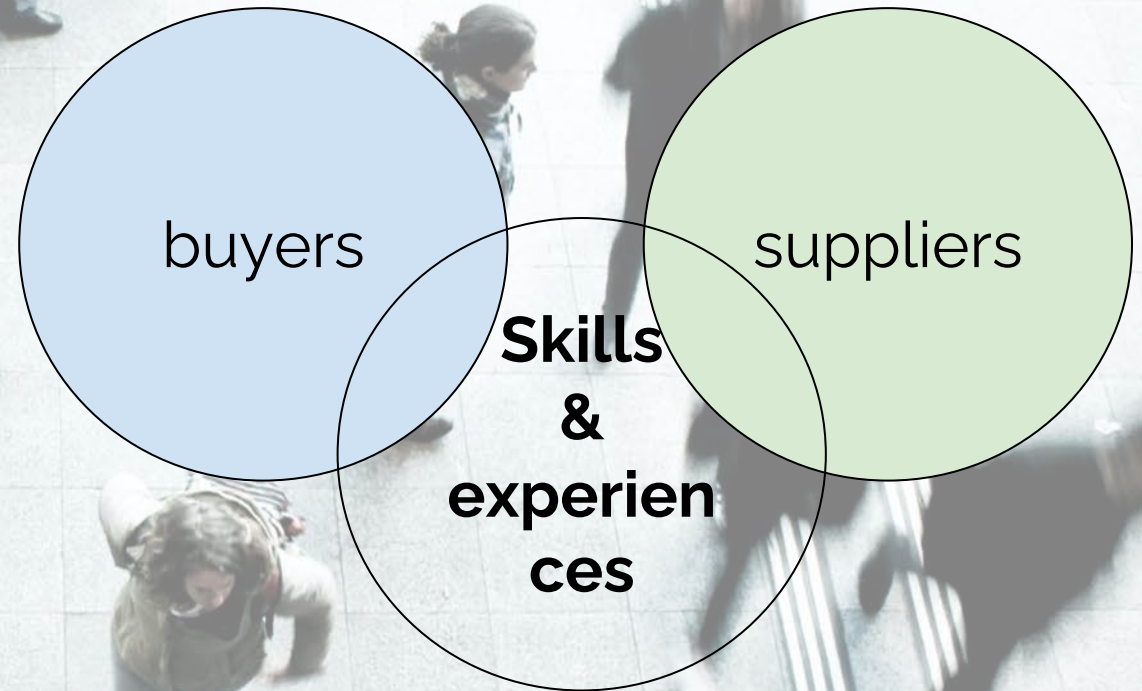
A resource crisis

- Scale of the problem
- Short term
- Long term
- Reskilling and upskilling
- Can sustainable tourism provide a part-solution?



WTTC figures

62
million
lost jobs



NORDIC TOURISM COLLECTIVE

ETOA

Short term

- Labour mobility across borders
- Removal of all travel restrictions
- Implementation of technological solutions
- Flexible working - hybrid and remote



Long term

- Create an industry that is secure, productive, and meaningful
- Address fears around financial security and unemployment.
- Focus on attracting and retaining new talent by
 - improving the perception of Travel & Tourism as a career choice
 - highlighting career growth opportunities
 - Improving retention
- Upskilling and reskilling



Reskilling and upskilling



NORDIC TOURISM COLLECTIVE

ETOA

Reskilling and upskilling



What are the jobs of the future?

A UNWTO survey identified 4 key areas:



NORDIC TOURISM COLLECTIVE

ETOA

Building and adding value

**Logistics became
more complex**

**Multiple
stakeholders**

**Experiential
tourism**



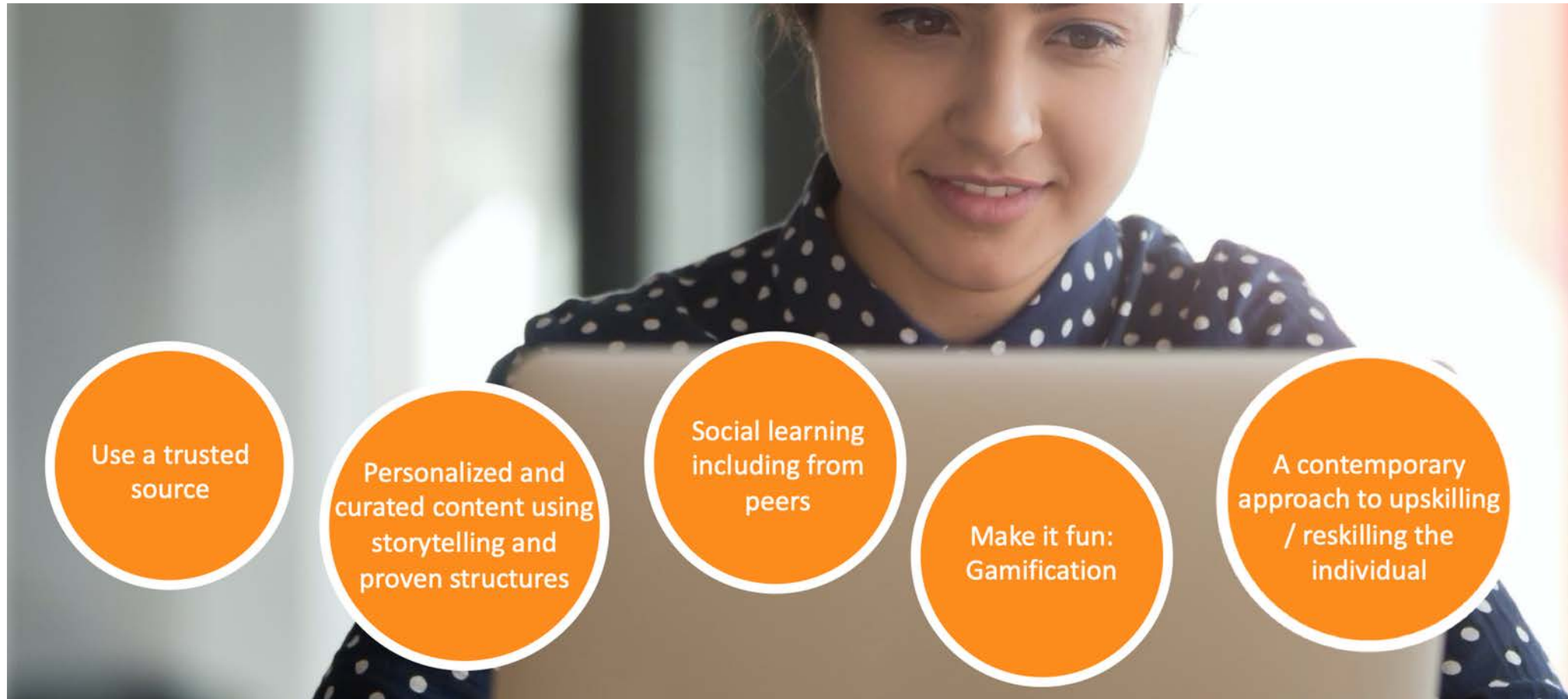
Embracing technology



NORDIC TOURISM COLLECTIVE

ETOA

What does good e-learning look like?



9 tips for tourism leadership



Sustainability



NORDIC TOURISM COLLECTIVE

ETOA

Can sustainability provide a recruitment-solution?

- Sustainable tourism can show that tourism is a force for good
- Sustainable Tourism provides:
 - Economic prosperity
 - Social equality and diversity
 - Benefits for local communities and providers
 - Preserves local and cultural heritage
- Nordic countries are leaders in sustainable tourism and ideally positioned

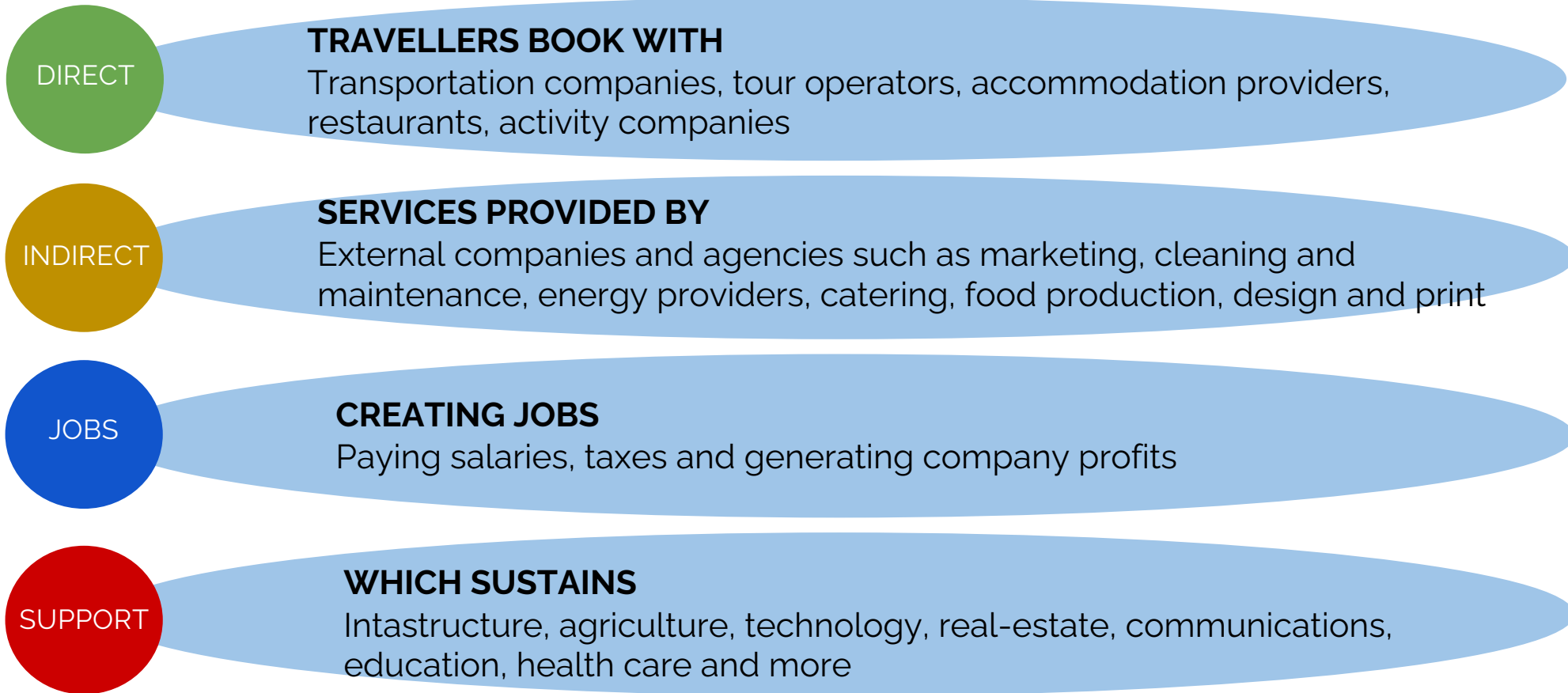


Sustainable tourism management

*Local communities, governmental agencies, NGOs and the tourism industry take a **multi-stakeholder approach** to maintain their country, region and town's cultural, environmental, economic and aesthetic integrity.*



Sustainable tourism management



Up for Discussion!


① Safety

1 volt → threshold of feeling tingling
5 volts → Maximum current level human can withstand

② Basic Circuits

Current - equals flow and is measured in amps
Voltage - is the force and it is labeled as volts
Resistance - is the opposition and is measured in Ohms (Ω)

③ Circuit theory

Series Circuit: 
Parallel: 

④ Digital Logic

Or Logic: $X = A + B$
And Logic: $X = A \cdot B$
Inverter: \bar{A}
NAND: $X = \overline{A \cdot B}$
NOR: $X = \overline{A + B}$
XOR: $X = A \oplus B$
X NOR: $X = \overline{A \oplus B}$

⑤

Hexadecimal:

16^4	16^3	16^2	16^1	16^0
65536	4096	256	16	1

Ex: 00100

256 16 1

1 6 =

4

2.5v





NORDIC TOURISM COLLECTIVE

ETOA

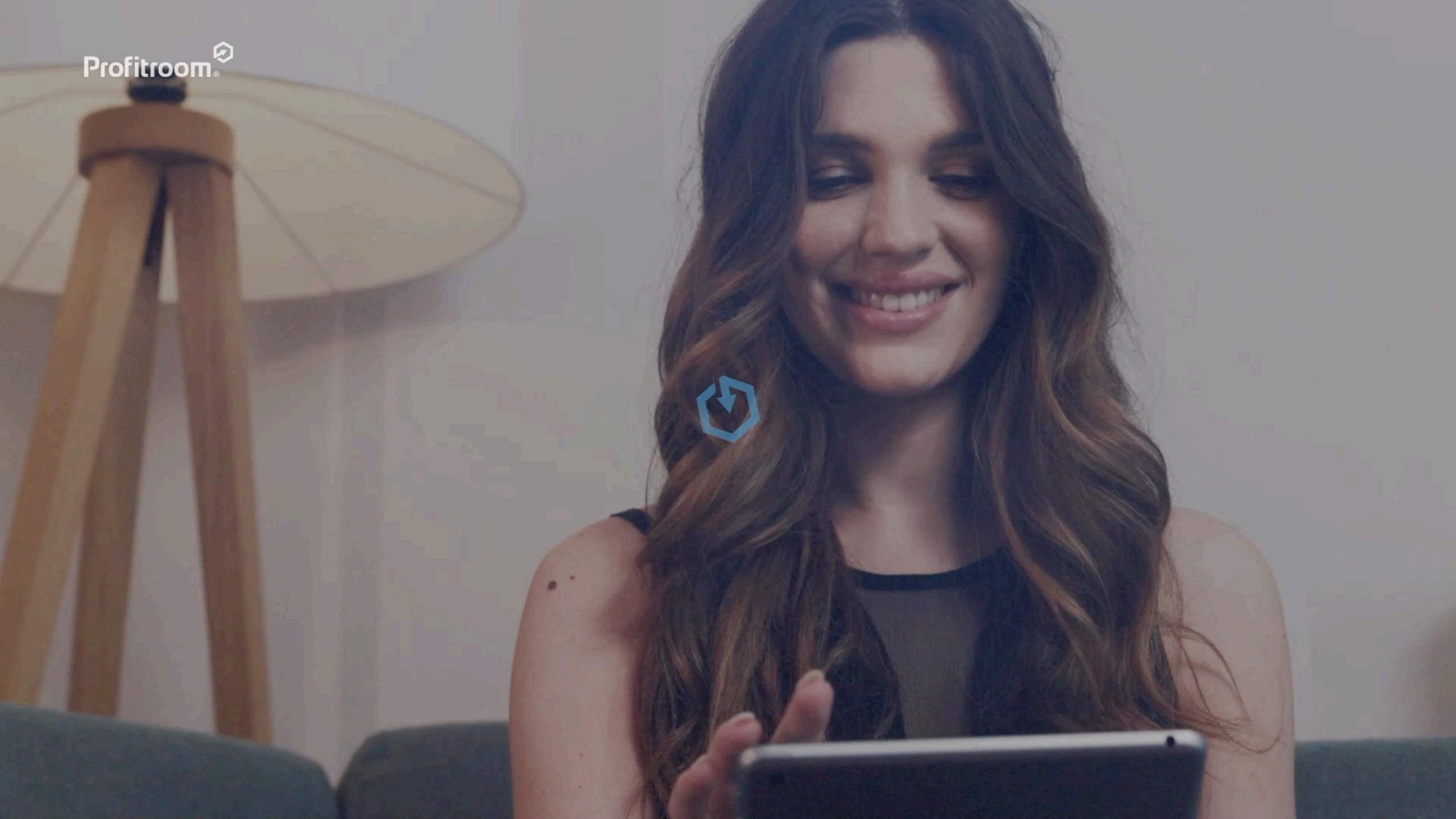
Thank you

s2



NORDIC TOURISM COLLECTIVE

ETOA



Reception Sponsor



18:30 Reception takes place in the Columbus Club, Deck 8
Drinks vouchers distributed on arrival

19:30 Buffet dinner in 7 Seas Restaurant, Deck 8



NORDIC TOURISM COLLECTIVE

ETOA

Event Sponsors

Headline Sponsor



Venue & Hosting Sponsor



Lunch Sponsor Reception Sponsor



Break Sponsors



NORDIC TOURISM COLLECTIVE

ETOA