

the Nordic Tourism Collective

A photograph of two men, Paul Wagner and Andy Fairburn, sitting at a dark table in a cafe. Paul is on the left, wearing a grey sweater, and Andy is on the right, wearing a dark blue turtleneck. They are both holding white mugs of tea. On the table are two plates of toasted cheese sandwiches, a small foil-wrapped packet of crisps, and a small metal container with salt and pepper. The background features a large black and white line drawing of a street scene with people and a car. The text 'alvinmark.com' is visible in the background drawing.

Paul
Wagner

Toasted cheese sandwich

Andy
Fairburn

'Builders' tea

Cheese&Onion crisps

Gill Haynes



Eliina Pavljuk



The Nordic Tourism Collective is a 'not for profit, collaborative network for Nordic & Baltic tourism'

Community:

- NTOs, DMOs, DMCs, Hotels, Transport, Attractions, Activities, Venues & other suppliers
- Global travel buyers who sell the Nordics
- Technology players
- Sustainability partners
- Intelligence partners
- Other Associations



Partners

ETOA

**NORDIC
MARKETING**

**EUROPEAN
TRAVEL
COMMISSION**


TerraVerde
Solutions for Greener Tourism


Global Travel & Tourism
**Resilience
Council**


GSTC

**GATEWAY
SOUTH** 

Foresight
Marketing


**PEAR
ANDERSON**


GVA


tmi



WORLD TOURISM ASSOCIATION
FOR CULTURE & HERITAGE

**WORLD
TRAVEL &
TOURISM
COUNCIL**

PATA[®]
Pacific Asia Travel Association



**The Nordic Tourism Collective is a
'not for profit, collaborative network
for Nordic & Baltic tourism'**

Our Activities:

- Dedicated Nordic B2B events
- Working Groups
- Webinars
- Nordic Trend Tracker
- **Tech**matters
- **Green**matters
- **Young**Vikings
- Captains**Cruise**



*If there is anything more you think we
can do to support and enhance
sustainable tourism to
the Nordic region...*

please let us know!



Planned activities 2025/26

The Nordic Marketplace 16-17 February 2026

Tivoli Hotel & Congress Center, Copenhagen

Hosted in cooperation with our industry partners ETOA and NordicMarketing

Bundle packages available with **Nordeuropa**, the online event for DACH & Benelux markets

Webinars: 2025

Emergence of the Polish Market

High-end travel - the future for the Nordics

Low season tourism and regional trends

Techmatters - Find your tech solution



Partner activities 2025

GEM
Global European
Marketplace

31 Oct-3 Nov 2025 | London



18 November 2025 | Online



European
Travel
Marketplace
Asia-Pacific

25 November | Online



ETOA

Nordic Trendtracker



2024 Observations & insights



NORDIC TOURISM COLLECTIVE

Summary

The year of 2024 turned out to be a good one for both suppliers and buyers alike.

Confidence

As the year of the season, suppliers and buyers were generally optimistic. Although the covid years were shadowed by the Ukraine conflict and a geopolitical shadow over the more Eastern countries of the Nordic area, the Nordic Consumer confidence was high and most suppliers were anticipating a good season. As the season got underway, however, buyers and suppliers were to some extent pessimistic. As the year turned, suppliers and buyers became more reflective and 2024 now becoming the most off-used word along with challenging and intensive.

There is no doubt that 2024 has been a good year for most Nordic suppliers and buyers, with many exceeding their targets but the frequency of comments that reflect an intense and busy year perhaps reflects the issue of resources and our ability to get our staff working in an industry as volatile and unpredictable as our own. Comments were equally optimistic for our increase and sluggish European economies.

Markets

The general market of course is the USA, fuelled by a strong dollar and a robust economy, adds from the USA arrived in their numbers. As Europe's target travelling market, the DACH markets (Germany, Austria and Switzerland) and the UK, France, Italy and Spain. The top five markets all have yet to return. Some suppliers have seen some returning like Greece, Italy, France, South Korea and South East Asia, but European markets have decreased.

Expectations

There is a slight tension between the supplier sentiment and that of the buyers. The suppliers are more optimistic, improving, unpredictable and busy.



Suppliers had been thinking 2024 was as others their year would end. The buyers started optimistically but then became more realistic as the season progressed. The buyers more aware of local market conditions and the effects of inflation and other consumer confidence issues.

Results

- The Nordic market trends for products are:
 - Value based
 - Seasonality
 - New destinations
 - Emergence of the 20-35 segment
 - Return of the Baltic
 - Upgrades in demand for Norway
 - Expansion of interest in Iceland
 - Continuation of low bookings

From mid summer, many Nordic suppliers recorded an increase in visitor spend, with clients paying more for products and services. As the year turned, however, to reflect their season or trend in the traditional shoulder seasons. Good interest was also shown in the return of the Baltic region.

Supplier feedback

Question: Please give ONE word that best gives an evaluation of business so far in 2024.

At the beginning of the season, suppliers were generally optimistic with many looking forward to a good season ahead. However, with inflation and unpredictable, improving, unpredictable and busy.

Although the covid years were behind us, continued uncertainties in Ukraine cast a geopolitical shadow over the most Eastern destinations, the Baltics. Consumer confidence was relatively high and most suppliers were anticipating a good season.

As the season got underway, most suppliers were happy with the visitor numbers climbing. Whilst the Baltic States slowly increased their numbers, however, in the Nordics visitor numbers were booming and exceeding expectations and many suppliers were reporting a good year, especially earlier in the Nordic region.

By the time the year draws to a close, suppliers appear to more reflective with 'Busy' now becoming the most off-used word along with challenging and intensive.

There is no doubt that 2024 has been a good year for most Nordic suppliers with many destinations and opportunities exceeding their targets but the frequency of comments that reflect an intensive and busy year perhaps reflects the issue of resources and our ability to staff up to satisfactory levels in an industry as volatile and unpredictable as our own.

NORDIC TOURISM COLLECTIVE

Buyer feedback

Question: Please give ONE word that best gives an evaluation of business so far in 2024.

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Buyer feedback

Question: Please give ONE word that best gives an evaluation of business so far in 2024.

At the beginning of the season buyers were generally optimistic with many looking forward to a good and encouraging season although wary of an increase in challenges given the slow start and uncertainty in the market.

As the season got underway, however, almost all buyers were seeing good business numbers and were optimistic of a bright year with words such as Good, growing, excellent and steady leading to confidence among buyers.

At the end of the year, the picture is a little more mixed with no clear cut consensus apparent. There were excellent, positive and steady leading but there was also more, busy and even sad.

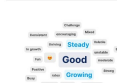
The vast majority of buyers had a good year with many underpinning expectations but during an otherwise excellent year, some buyers were concerned about the economy and increase in inflation. From about a third in many Nordic destinations and also capacity and seasonal issues that created problems in some pinch-point destinations.

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Survey December 2024



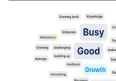
Survey August 2024



Survey January 2024



Survey December 2024



Survey August 2024



NordicTrendTracker Buyers Q1 2025

- In one word, how would you best describe business in Q1 of 2025?
- What impact has the imposition of US tariffs had, or you expect will have, on business?
- If yes, does this apply to any specific segments?
- What impact has the US position on Greenland had, or you expect will have, on business?
- If yes, does this apply to any specific markets?
- How do you expect business to be this year, compared to 2024?
- What looks to be your strongest holiday trend at the moment (please tick any which are relevant)

In one word, how would you best describe business in Q1 of 2025?
Wordcloud Poll 23 responses 23 participants



Our aim is to help **support the digitalisation of Nordic Tourism** through sharing, educating and raising awareness on all things Travel Technology related.

Techmatters

by NORDIC TOURISM COLLECTIVE

- Practical support for Tourism businesses in understanding the different types of technology and how they interact
- Support with informative content and knowledge sharing
- Encouraging Collaboration between sectors to drive sustainable technological development and digital design.
- Webinars, showrooms and events

Nici Pagels
TechMatters -
Programme Lead

**Travel Tech Enthusiast.
Digitalisation Geek.
Growth Expert.**

nici@nordictourismcollective.com

Techmatters
by NORDIC TOURISM COLLECTIVE

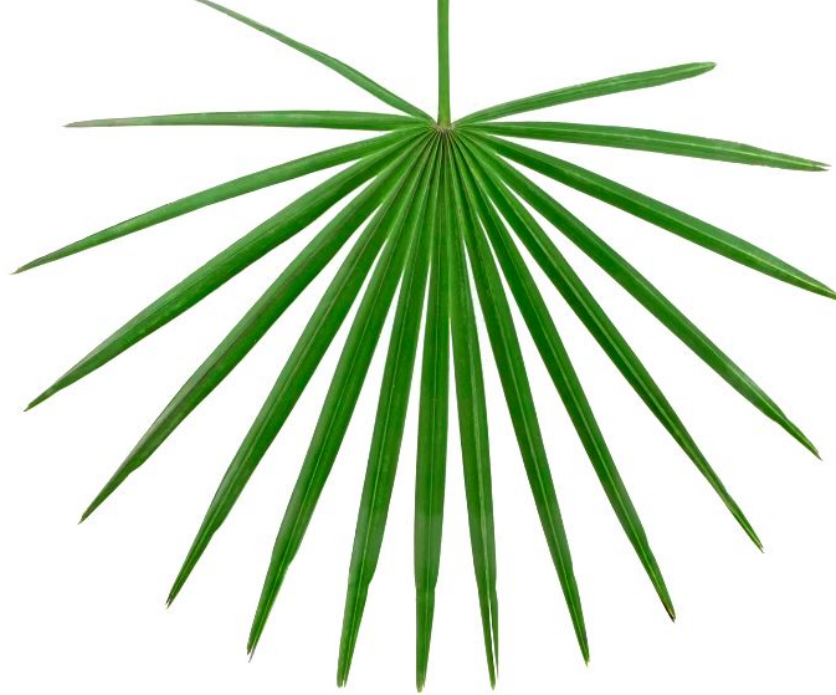


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Greenmatters

- Board level “impact finder” workshops
- Responsible communications guidance
- ESG Regulations
- Carbon Measurement
- Supplier Chain analysis
- Frameworks for creating sustainable products
- Climate change risk assessments
- Training programmes
- Carbon awareness courses



In cooperation with



The future of our tourism industry

30x Nordic tourism professionals under 30 years of age

To hear their views, ideas, dreams and challenges

Young Vikings

Discussion topics

- Sustainability
- Marketing and Product Development
- Technology
- Geo-politics and Xcultural understanding

Providing a platform to succeed and inspire



Young vik

by NORDIC TOURISM CO

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Progr



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Looking to the future

Our mission is to promote sustainable tourism throughout the Nordic region:

Achieved by means of:

- A thriving industry full of real careers and exciting opportunities for the young
- Healthy yet responsible air and sea routes, to and in the region
- An industry which is ready to be deeply integrated with its sustainable principles
- An industry embracing technology
- Finding real solutions for more year-round tourism
- Deep collaboration throughout the industry in the future

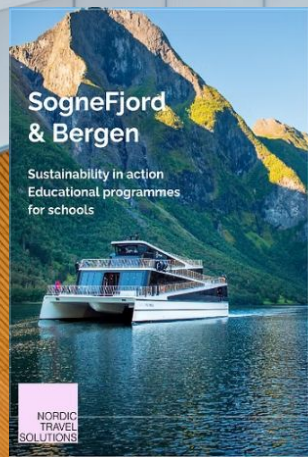
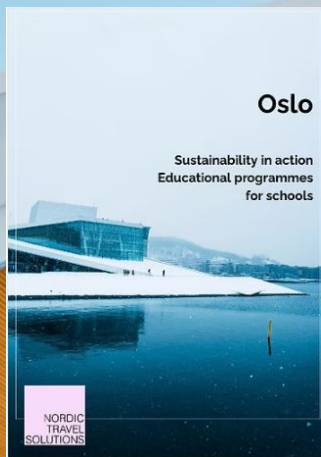
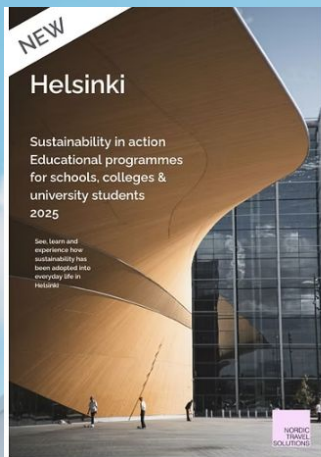
Nordic Travel Solutions

Marketing & representation services in UK

NORDIC
TRAVEL
SOLUTIONS

- Representation
- UK market research
- Training
- Promotions & events
- Workshops





educational sustainability tours

Partners

**150 Tour
operators**

**375 travel
agents**



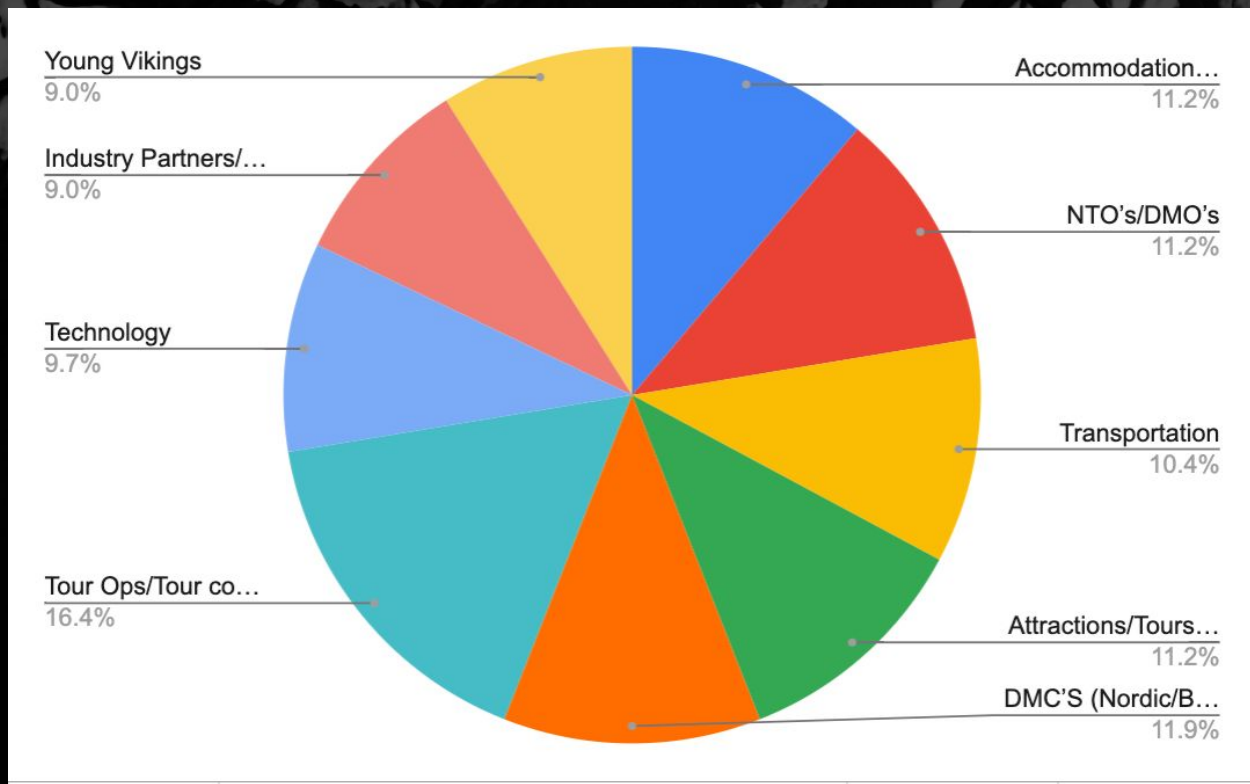
TRAVEL WEEKLY



NORDIC
TRAVEL
SOLUTIONS

CaptainsCruise2025

"It's the only event where you can network, be inspired, learn and enjoy all at the same time, dedicated to the entire Nordic and Baltic tourism industry"





NORDIC TOURISM COLLECTIVE

Agenda



Andy Fairburn

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Program

27.08.2025

28.08.2025

29.08.2025

Show all locations

07:00 - 09:15

Grande Buffet (DECK 6)



Breakfast

09:15 - 10:15

Starlight (DECK 7)



Morning sessions

Welcome to the Captains Cruise on behalf of Nordic Tourism Collective...

[show more](#)

Speaker



Andy Fairburn

Director @ Nordic Tourism Collective



Paul Wagner

Director @ Nordic Tourism Collective



Nina Tähtinen

International Sales Director @ Tallink Silja Line

10:15 - 10:30

Starlight



Coffee break

Coffee Brea...

[show more](#)

10:30 - 12:30

Starlight



Global market updates

Market updates from our representatives around the world...

[show more](#)

12:30 - 13:30

Grande Buffet (DECK 6)



Lunch

13:30 - 14:20

Starlight



S1 - Seasonality

Overcoming the obstacles in achieving balanced seasonali...

[show more](#)

Speaker



Roberto Perez

CEO Nordic Ways @ Travel & Events Nordic Ways



Patrick Richards

Director @ TerraVerde Sustainability

TALLINK | SILJA LINE



SOKOS HOTELS



What makes the CaptainsCruise different?

It's the only event where you get quality time to network and learn

It should help you get a perspective before we are back in high season

Chance to not only meet buyers/suppliers but industry partners as well

We want to keep shaping and developing this event and concept

We want this to complement the high quality national activities of the NTO's

We want you to go back inspired, motivated and full of ideas

The more you interact the more you will get out of it!

Get involved

We will help you get the most out of your day and evening

- We will share all the content with you from the Market updates
- Feel free to ask our experts questions during the networking breaks
- Share any thoughts with the panelists during the sessions
- Session 4 is to hear from you using the Slido App
- We will share the results of these polls with you after the event
- We will ask you for feedback after the event to make it even better