

**Norway's Tourist Barometer
Forecast for Norwegian and foreign
holiday and leisure traffic in Norway for the 2019 winter
season**

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Innovation Norway's forecasts are clear; optimism continues into 2019

This is shown in Norway's Tourist Barometer, an expert panel composed of Norwegian tourism industry and foreign players selling Norway

- The expert panel is optimistic at the start of this year's winter season. In the survey they were asked to rate this year's winter season compared with the 2018 winter season.
- As many as 89 percent believe this year's winter will be better or similar to last year. These are good figures, viewed in the light of an increase of six percent in foreign overnight stays last winter.
- 41 percent of the participants believe this year's winter will be better than last year, and 49 percent believe it will be similar. Only 11 percent expect a decline. There is optimism on the part of the vast majority of markets that took part in the survey. Both from the major skiing markets, but also from smaller volume markets, that primarily come to Norway to experience the Northern Lights.
- The most decisive factor for the winter season is good snow conditions and that Danes and Swedes come. Therefore, it is worth noting that 78 percent of the Danish respondents are expecting a growth this winter. An increase of 27 percent is expected by the Swedish respondents, while the remainder expect the same volume as last year.

Growth to northern Norway

Depends on good snow conditions

- Northern Lights tourism has made the Norwegian winter product more robust by attracting tourists from other markets and target groups than the traditional ski segment.
- Northern Norway in particular has experienced a strong increase in overnight stays with guests from the USA, Asia and Southern Europe, but Britons and Germans are also attracted to the Northern Lights, the Hurtigruten Coastal Express and Arctic winter adventures. There is good optimism from the United States and southern Europe. There is somewhat less optimism among the British respondents, and much suggests that the decline we have had in recent years continues into 2019.
- Even with a good growth in northern Norway in recent years, ski tourists are the largest group, and a great deal depends on *snow conditions*. If there are good snow conditions, the time is often short between making the decision and arriving in Norway. The fact that Easter is late this year may lead to fewer people visiting the mountains, and ski destinations losing out on important traffic at the end of the season.

The world's population is travelling like never before.

Figures from the World Tourism Organization (UNWTO) show that 2018 was the eighth year in a row with major growth in international tourism. UNWTO's figures for the first half of 2018 show a growth of six percent. The forecasts predict an increase of four to five percent for the year, so the growth in the first half-year is much stronger than expected.

The Norwegian krone is still weak

Norway remains highly competitive. The Norwegian krone has remained relatively low compared with many other countries' currencies. This means that foreign tourists get more for their money in Norway. In particular, the number of Danish overnight stays during the winter season has been shown to follow the krone exchange rate. A weak krone leads to more Danish overnight stays, and vice versa.

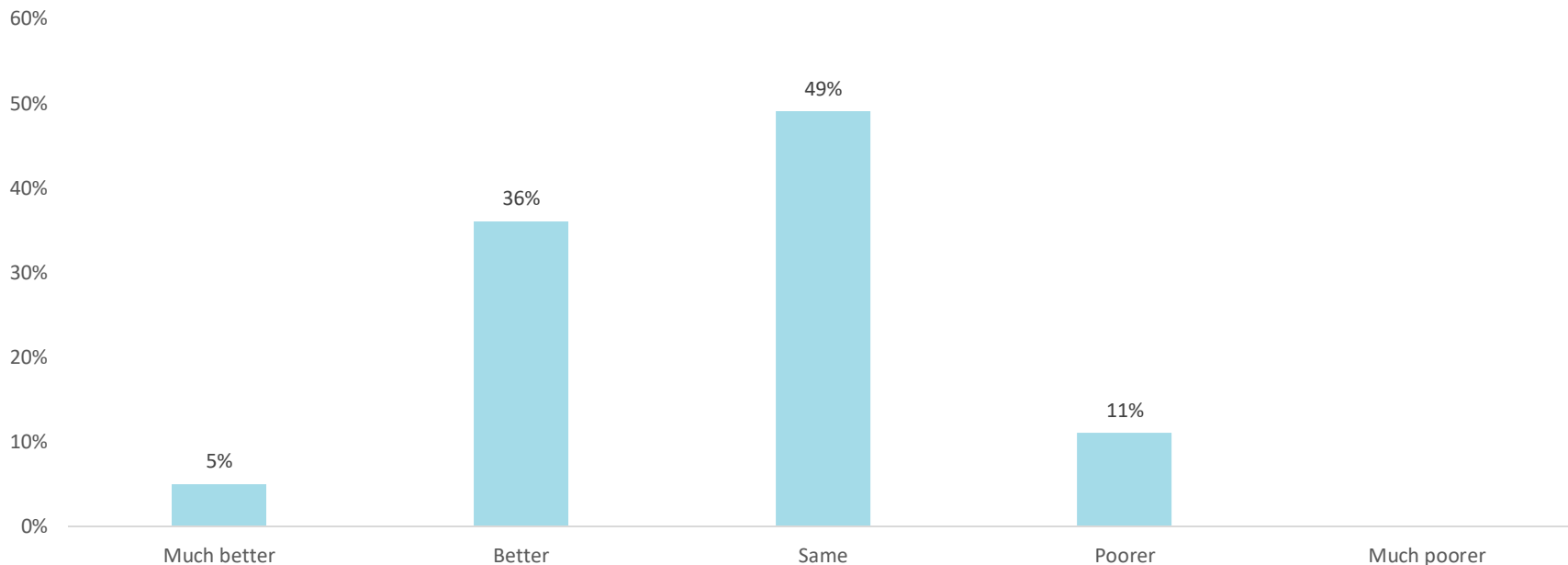
Considered one of the safest destinations in the world

Figures from IPK International show that Norway is still considered one of the safest travel destinations in the world.



89 percent expect the 2019 winter season to be the same as last year or better

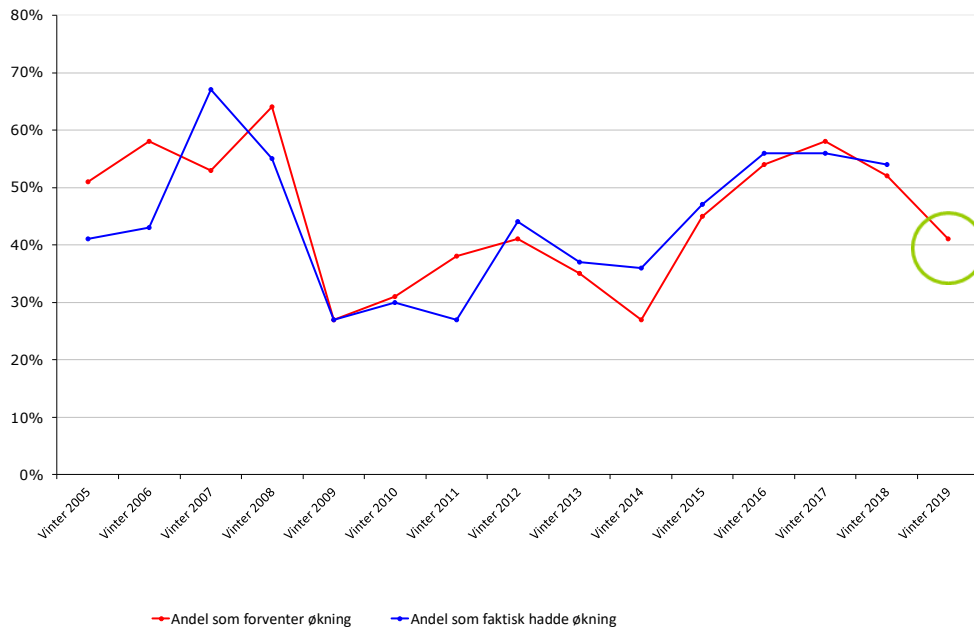
Half of this figure expect the winter season to be the same as last year, while 41 percent expect continued growth. Only 11 percent believe this year's winter season will be poorer than last year. Compared to previous years, expectations are somewhat lower, but these are expectations on the top of good results.



41 percent of those who participated expect a continued growth into the 2019 winter season.

Question:

What are your expectations for traffic development to Norway this winter season, compared with last winter?

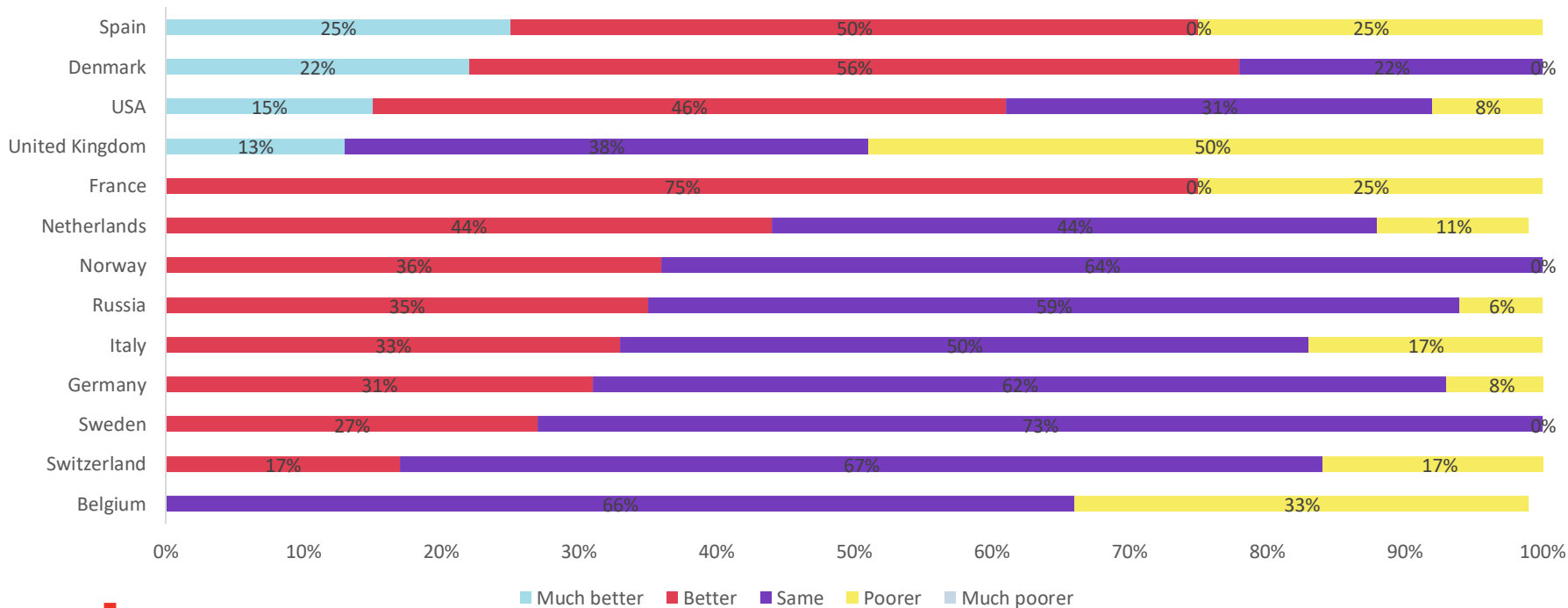


Expectations over time

Half of this figure expect the winter season to be the same as last year, while 41 percent expect continued growth. Only 11 percent believe this year's winter season will be poorer than last year. Compared to previous years, expectations are somewhat lower, but these are expectations on the top of good results.

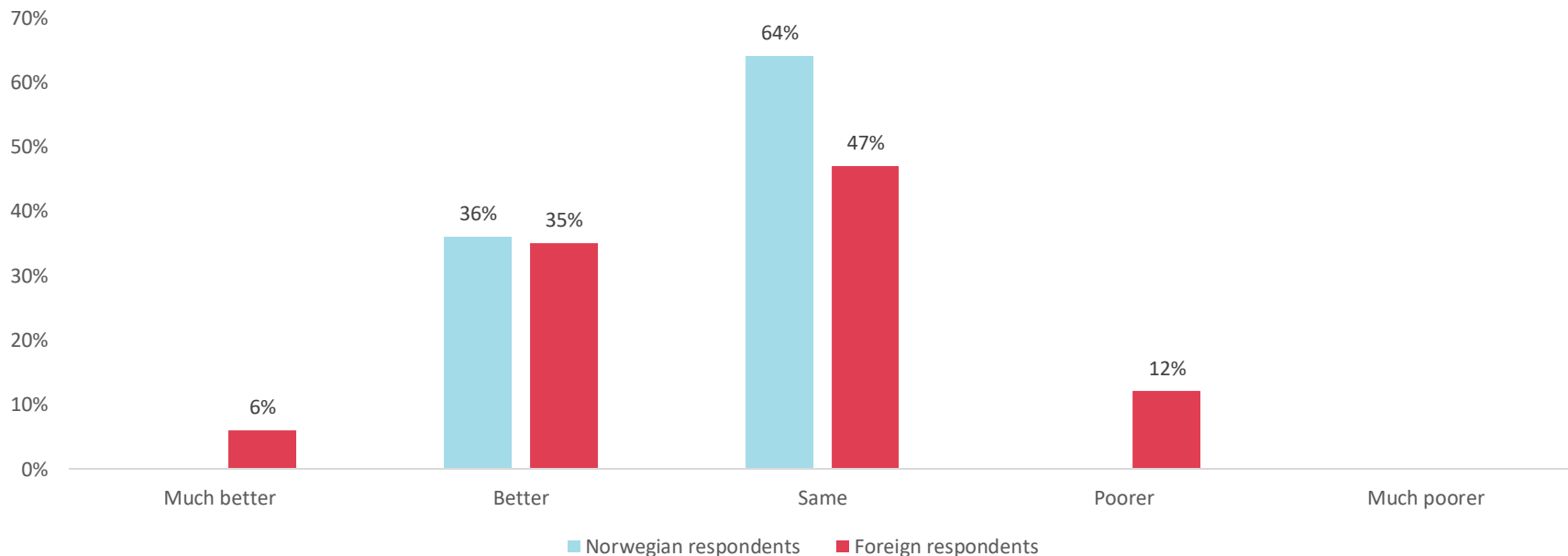


Expectation per market

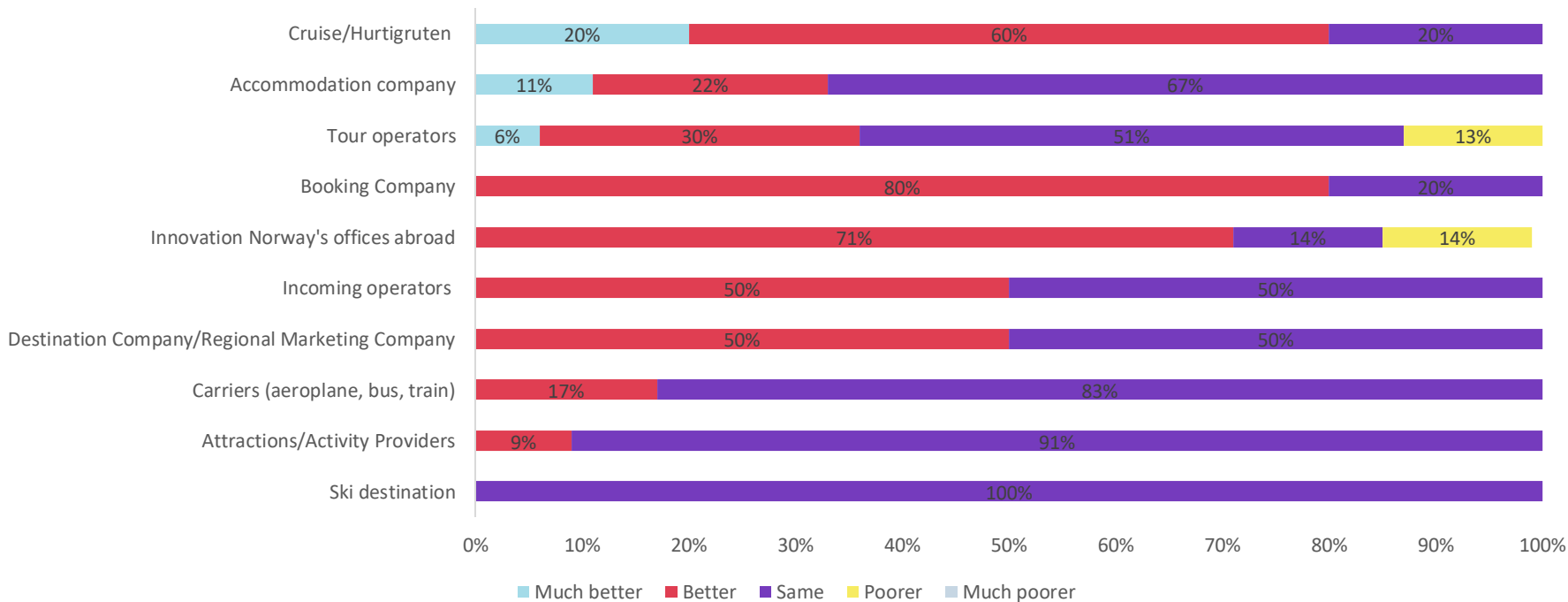


Expectations vary more when we view the responses from the Norwegian and foreign respondents

The foreign respondents, mainly represented by tour operators, are traditionally somewhat more divided than the Norwegian industry. 12 percent expect a decline this winter, while 12 percent expect this year's winter to be much better.



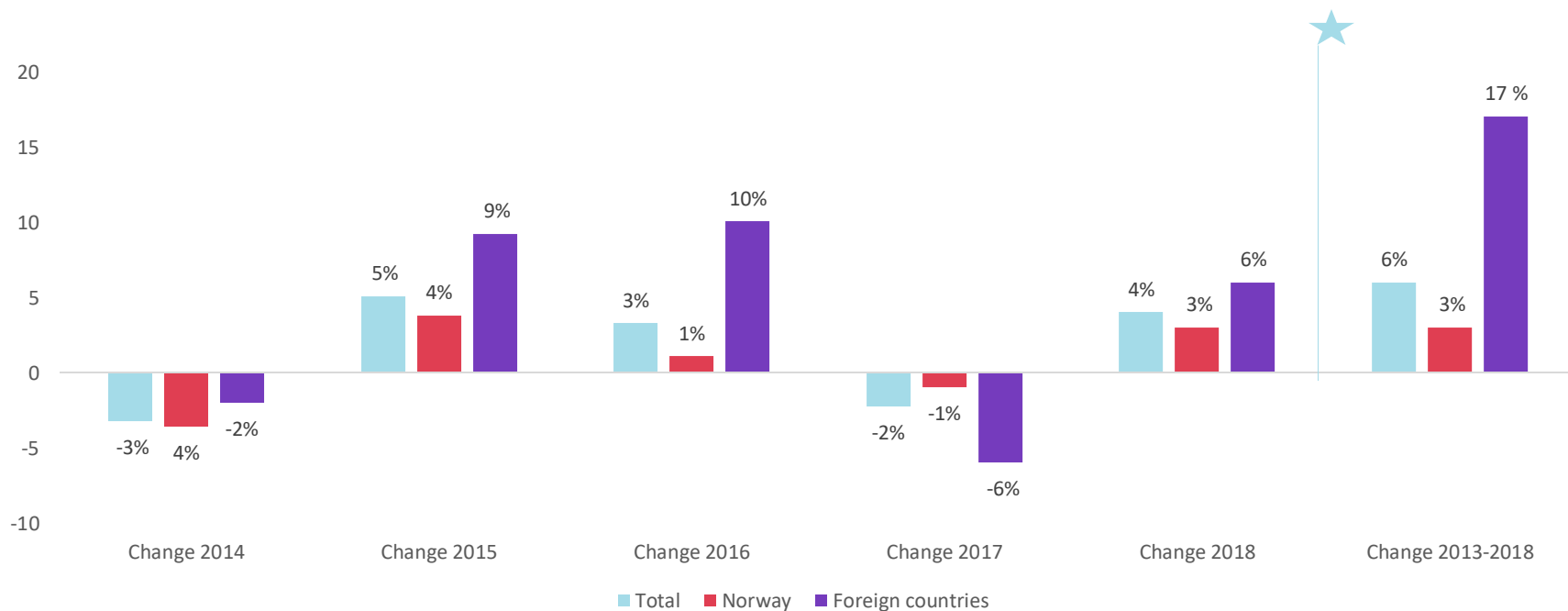
Expectations per sector



A retrospective view of previous winter seasons

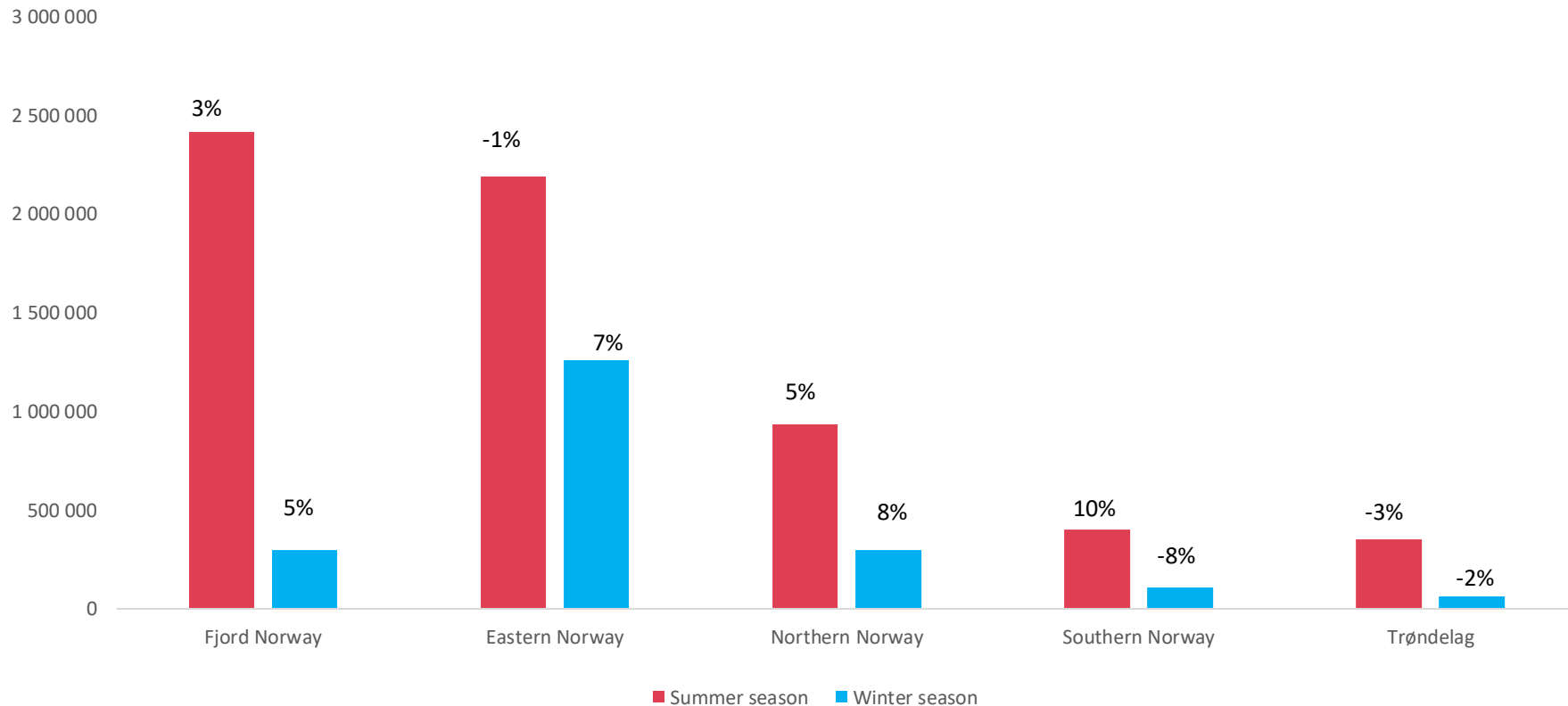
Winter Season 2014 – 2018

After two winter seasons of growth, it stagnated in 2017. The 2017 season was characterized by shortage of snow, and Easter was late. It picked up in 2018, and the number of foreign overnight stays increased by 6 percent. Despite this growth, the number of foreign overnight stays is one percent lower than in 2016.



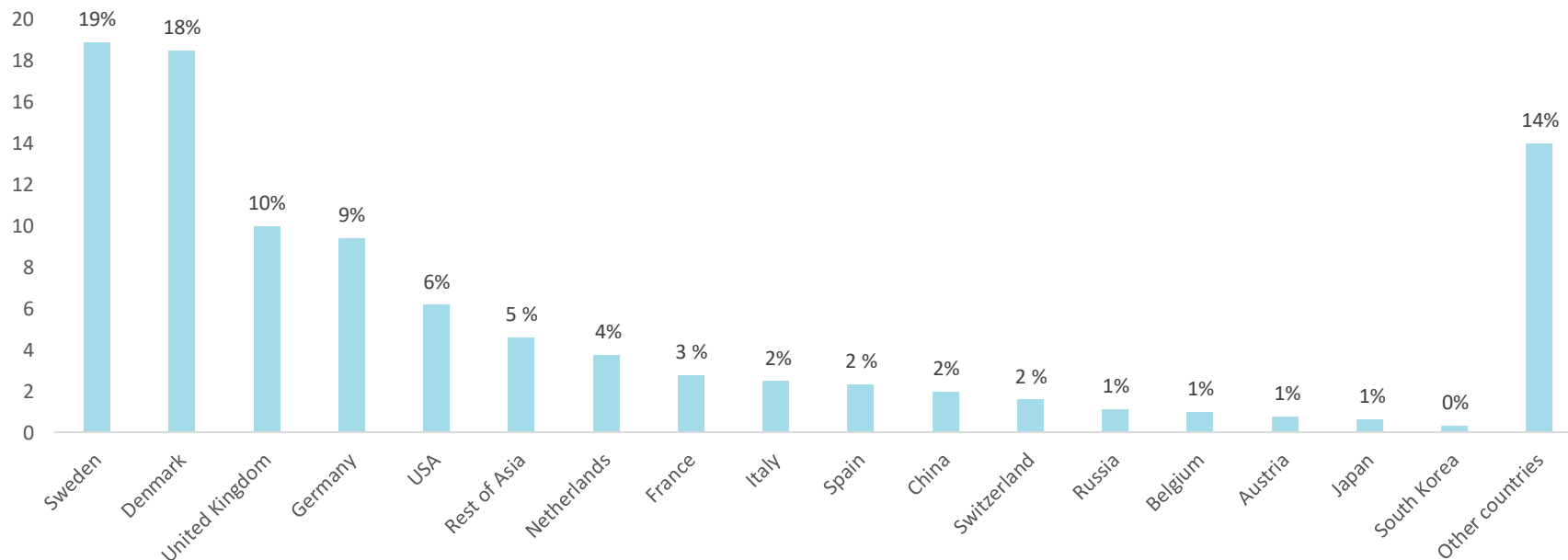
Development in foreign overnight stays 2018

Total for Norway
Summer season: 2%
Winter season: 6%



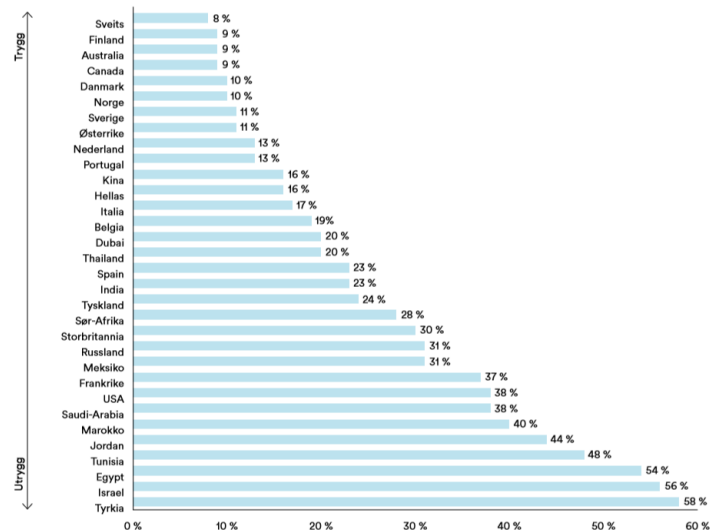
Composition of foreign overnight stays, winter season 2016

For the second year in a row, Denmark lost its top position as the largest winter market, and had to see itself beaten by Sweden.



Norway is considered one of the safest travel destinations in the world

Spørsmål:
Ville du bekymre deg for terrortrusler hvis
du reiste til følgende destinasjoner?



Background and methodology

- An electronic questionnaire was sent out and was accessible from 22 November - 18 December 2018.
- 137 participated in the survey.
- The purpose of the Tourist Barometer is to provide an overview of the expected growth in traffic, broken down by markets and sectors.
- Participants in the survey have been involved in Innovation Norway's campaigns and activities over the past 12 months, with the exception of the Norwegian inbound operators.
- The expert panel is made up of representatives from the tourism industry at home and abroad. These represent tour operators, inbound operators, accommodation providers, carriers, cruises, activity and attraction enterprises, local tourist offices, regional destination marketing companies, and Innovation Norway's marketing managers in the respective markets.
- The survey is conducted twice a year, before the summer and winter seasons.
- This is the 32nd time the Norwegian Tourist Barometer has been conducted.



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