

*Does Norway have a potential as a skiing destination for Europe and Russia within the B2B sector?*

Market report ski potential  
December 2020

*Austria, Denmark, France, Germany, Italy, Netherlands, Russia, Spain, Sweden, Switzerland, United Kingdom*

# Potential in numbers

This preliminary report uncovers that there is **indeed a potential** for Norway to develop skiing products towards the B2B sector in Europe & Russia.

## To sum up in numbers:

- **Around 190 tour operators** in Europe and Russia are offering skiing holidays as a product.
- **Around 80 to 100 tour operators** have the potential of developing their existing skiing portfolio to Norway or start including Norway as a skiing destination.

*Please note that the numbers below are estimates and based on the market as per today. They are susceptible to change due to COVID and future developments.*

Market	No. of TOs offering skiing products	No. of TOs that have the potential of developing ski travel to Norway
Austria/Germany/Switzerland	Around 40	Between 5 and 10
Denmark	5	Difficult to predict due to COVID and future developments
France	Around 20	Around 3
Italy	10 to 15	10 to 15
Netherlands	15	Difficult to say due to COVID and future developments
Russia	>30	Around 30
Spain	15 to 20	6 to 10
Sweden	>26	6 to 10
United Kingdom	>30	17

## Barriers (1)

- We have looked at the barriers that Norway is challenged with and which we have to work with in order to develop the country into an attractive skiing destination.
- Some barriers are common for almost all markets, as described here

## Barriers – for several markets

- **High competition**
  - Europe offers well developed and well-known skiing destinations such as the Alps (France, Switzerland & Italy)
- **Lack of product knowledge**
- **Booking policy**
  - Booking policies are often experienced as too rigid and not adapted to tour operators.
- **Price**
  - Norway is perceived as a more expensive destination than the Alps.
- **Accessibility**
  - Access is considered more complicated than to the Alps (applies for some markets only: FR, ES, IT, UK, DE/AT/CH, although easier for northern part of Germany due to ferry connection).

## Barriers (2)

As you can see below, some barriers are more specific to markets. This depends on the market specific needs but also on geography.

### **Other barriers – specific to markets**

#### **Austria/Germany/Switzerland**

- Relatively small stations, less after-ski offers
- No restaurants/chalets on the slopes
- Shorter ski-school hours
- Not all stations have as high quality lifts as in the Alps
- Competition from Austria/the Alps

#### **France**

Great loyalty to their resorts (3 of 4 customers) - might be more difficult to make them change their skiing habits

#### **Italy**

Competition from Slovenia in addition to the Alps

#### **Russia**

Competition from Sweden and Finnish Lapland in addition to the Alps

# Strengths (1)

**But Norway also has strengths, and most markets mention the following:**

- Snow guarantee
- Longest ski season in Europe
- Safe destination
- Good quality on snow and slopes
- Family-friendly destination
- «Ski in / ski out»
- No crowds / no waiting time for the lifts

## Strengths (2)

### **Other market-specific strengths are:**

#### **Austria/Germany/Switzerland**

Amazing landscapes, cottage holidays, more peaceful, less skiing accidents, no alcohol on the slopes

#### **France**

Sustainable destinations & providers

Norway's authenticity when it comes to skiing – «the cradle of skiing»

#### **Netherlands**

Close, feels «like home».

#### **Russia**

Possible to drive to Norway with your own car

#### **Sweden**

Higher mountains than in Sweden, possibility of combining cross-country with alpine skiing

#### **United Kingdom**

Efficient ski lift facilities

# Booking patterns

- We do not have exact numbers as to how many book their skiing holidays directly or with a tour operator.
- In most markets, it is reported that direct bookings are high when it comes to this type of holidays but that clients are more likely to book via a tour operator when:
  - They do not know the destination
  - They would like a unique skiing experience

# Summary

## To sum-up, the report shows the following:

- Norway has the **potential within the B2B sector** to place itself as a skiing-destination in European markets.
- Norway is not well known as a ski destination, and that will be the main challenge in the beginning: **to establish Norway as an alternative to already known destinations**
- **Accessibility depends a lot on the markets** and in some it can be a strength whereas in others a challenge. That will influence the kind of products that are highlighted, for example:
  - Where accessibility is a challenge: Focus on Norway as an exclusive skiing destination, competing with other far away countries such as USA, Canada and Japan. Combine the experience with other cultural and soft activities. (FR/ES/IT)
  - Where accessibility is not a challenge: Focus on Norway as a family-friendly destination, great combination between alpine and cross-country skiing, good snow and no crowds. (UK/SE/DE/AT/CH/Russia/NL/DK)
- **Competitive pricing and good booking solutions** for tour operators are crucial elements in most markets if the destination shall be able to develop.