

# GERMAN SKIERS

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NORWAYS MARKET POSITION AMONG GERMAN  
SKIERS

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INNOVATION NORWAY



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# PURPOSE AND DATA



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## Purpose

Innovation Norway is strategically working on attracting skiers from Germany to Norway. A key element in this task is to have updated information on the skiing market in Germany. This includes information about Norway's position on the German ski market as well as knowledge about how German ski tourists travel and what they do on their ski holiday. This knowledge is essential when developing campaigns aimed at attracting German skiers.

This report provides updated information about Norway's position on the German ski market compared to the major competing destinations in Europe as well as information about preferences and behavior of the German ski tourists.

Analogous reports are made for the ski markets in Denmark, South Eastern United Kingdom and Sweden.

## Data

This report is based on **4.193** online interviews with Germans aged 18 years or older. **1.009** of them have been on at least one ski holiday in the past season (October 2018 to April 2019).

All interviews are conducted between May 16<sup>th</sup> and July 7<sup>th</sup>, 2019.

The number of interviews in each region are:

- **Berlin:** 961 (354 ski tourists)
- **Mecklenburg-Vorpommern:** 271 (59 ski tourists)
- **Niedersachsen and Bremen:** 1.178 (302 ski tourists)
- **Schleswig-Holstein:** 517 (127 ski tourists)
- **Hamburg:** 547 (167 ski tourists)

# METHOD

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## Design

The study is designed to display the distribution of travels rather than respondents, i.e. if a respondent went on more than one ski holiday during the past season, each of his/her holidays are included in the distributions.

All respondents are asked how many ski holidays they went on in the past season. Respondents who state that they were on one ski holiday are asked which country they went to, with whom they traveled, the size of their travels party, the number of nights they spent and if they went alpine skiing, snowboard, cross country skiing and/or off-piste skiing.

Respondents stating that they went on more than one ski holiday in the past season were asked the same questions for each of their holidays separately. Thus, each holiday accounts for a separate holiday in the data analysis.

## Measured market share

The share of the market is measured in three different ways:

- **Travels:** The market share for each country is calculated by looking at the number of travels that have gone to a specific country as a percentage of all travels.
- **Travellers:** The market share for the specific country is calculated by looking at the size of the travel group that the respondent travelled with to the country. For each country, the market share is the sum of the size of the travel group to this country divided by the sum of all travel groups.
- **Nights spent:** The market share is calculated as the number of nights spent in a country as a percentage of the total number of nights spent in all countries.

## Data processing

The collected data has been weighted and processed to make the best possible estimates of the real population distributions. The data processing has been conducted analogously to the previous reports to ensure consistency.

## Comparison with previous seasons

In selected charts, results are compared with results from previous seasons. However, due to statistical uncertainty, any developments over time should be interpreted with caution.



## THEME 1: MARKET SHARE

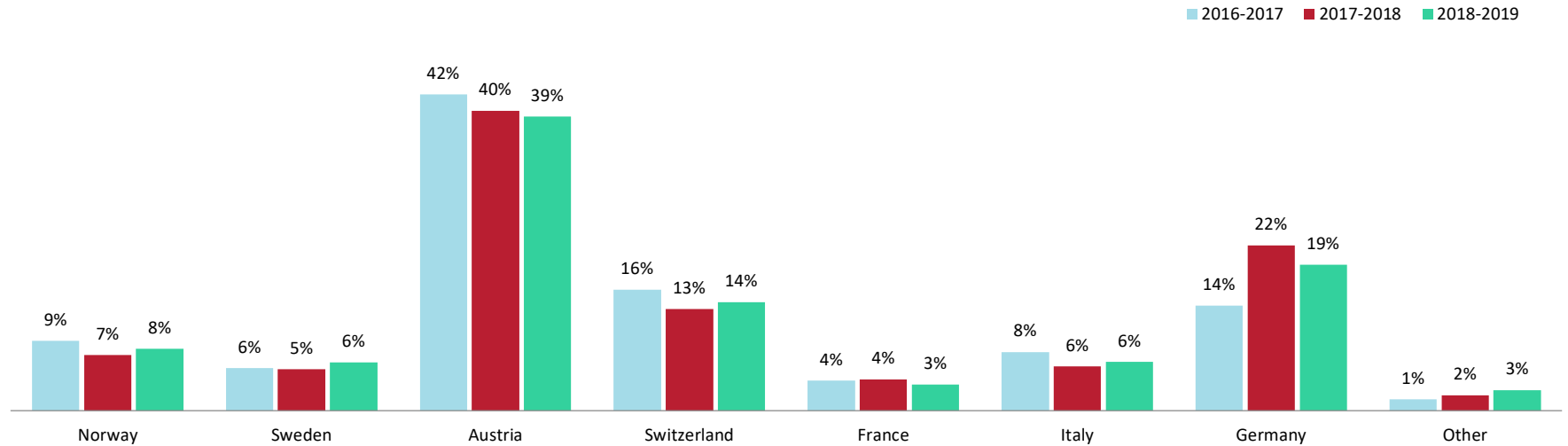
# NORWAY HOLDS A STEADY POSITION ON THE GERMAN SKI MARKET

## KEY FINDINGS:

Norway holds a quite steady position on the North German market, with a total market share of about 8%, which is a level similar to Sweden and Italy. The most popular destination among the North German skiers is Austria, followed by Germany and Switzerland.



Market share as percentages of travels



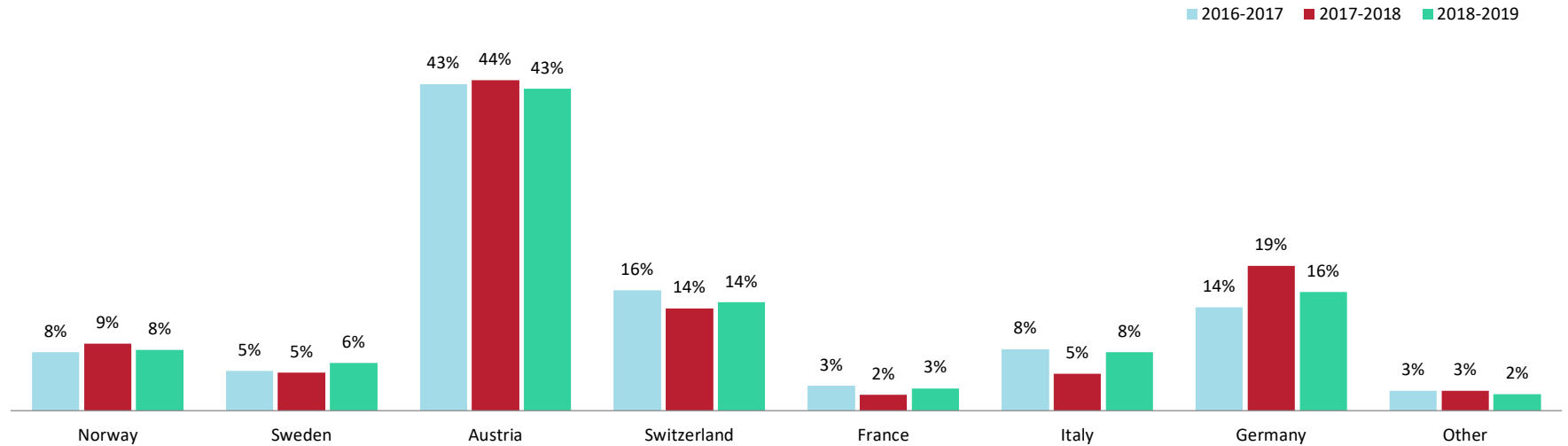
# NORWAY HOLDS A STEADY POSITION ON THE GERMAN SKI MARKET

## KEY FINDINGS:

A very similar pattern is seen when looking at the distribution of travellers rather than travels. It can be noted that the distribution has been remarkably steady over the past three seasons.



Market share as percentages of travellers



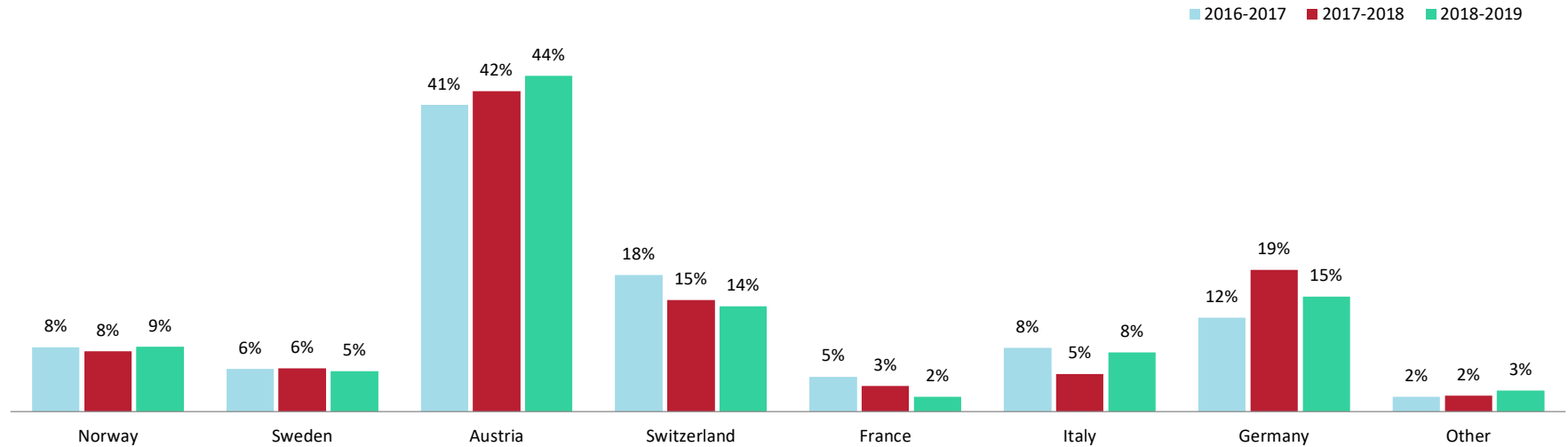
# NORWAY HOLDS A STEADY POSITION ON THE GERMAN SKI MARKET

## KEY FINDINGS:

Finally, when turning the focus to the distribution of nights spent at each destination, Austria seems to have gained market shares over the past three years, while Switzerland has lost market shares. However, the changes are very limited.



Market share as percentages of nights spent





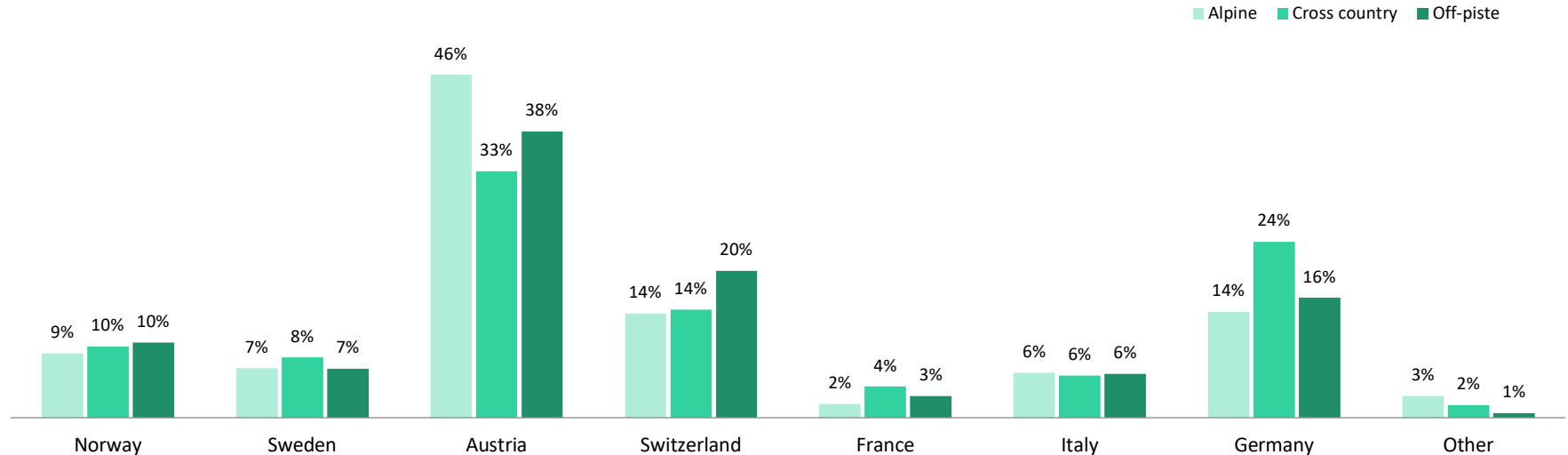
# NORWAY HOLDS EQUAL MARKET SHARES AMONG GERMAN ALPINE AND CROSS COUNTRY SKIERS

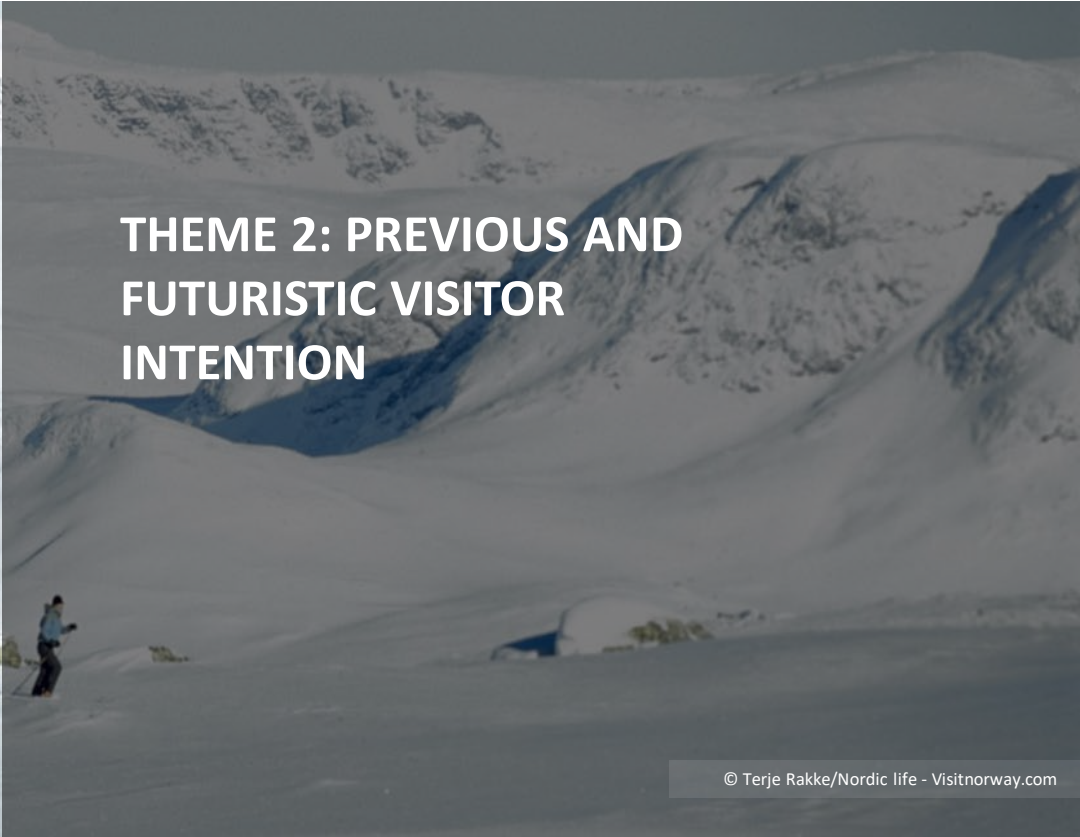
## KEY FINDINGS:

Norway's market share in Germany is on a similar level across all three types of skiing. This is rather unusual compared to other markets, where Norway usually holds a greater market share among cross country skiers. The German cross country skiers more often choose to spend their ski holiday within Germany.



Market share of different skiing types as percentages of travels





## THEME 2: PREVIOUS AND FUTURISTIC VISITOR INTENTION

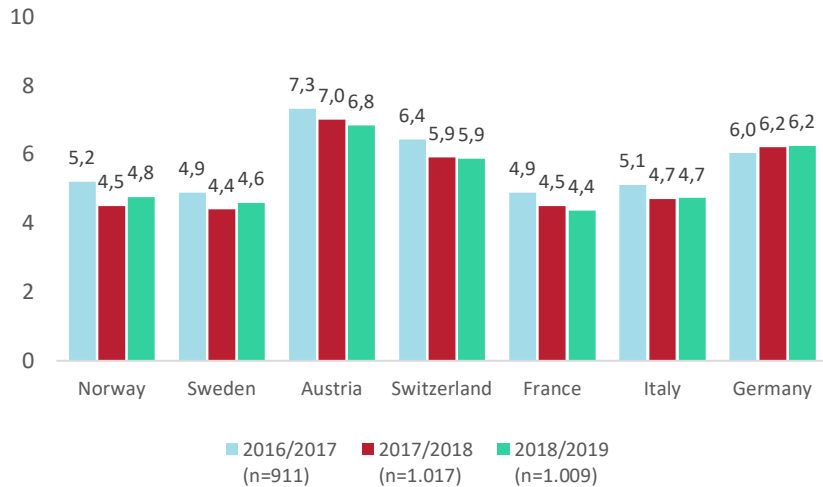
# THE PROBABILITY OF VISITING NORWAY IS LARGELY UNCHANGED

## KEY FINDINGS:

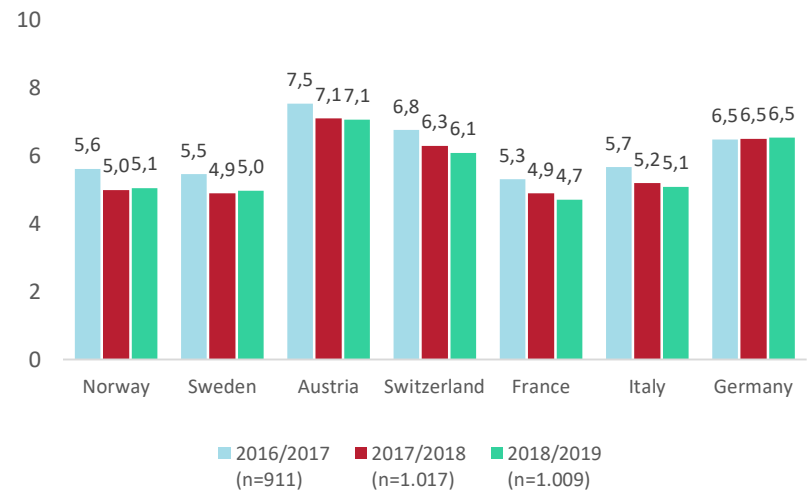
The German skiers find it about as likely to visit Norway on a future ski holiday as Sweden and Italy. Besides Germany, Austria and Switzerland are among the favorite destinations for future ski holidays. However, this tendency may be slowly changing, as the German skiers now find it less likely to choose Austria and Switzerland for future ski holidays than they did two years ago.



Average probability that German ski tourists visit each country next season



Average probability that German ski tourists visit each country in the future



# JUST BELOW 200.000 NORTH GERMAN SKI TOURISTS VISITED NORWAY IN THE LAST SEASON

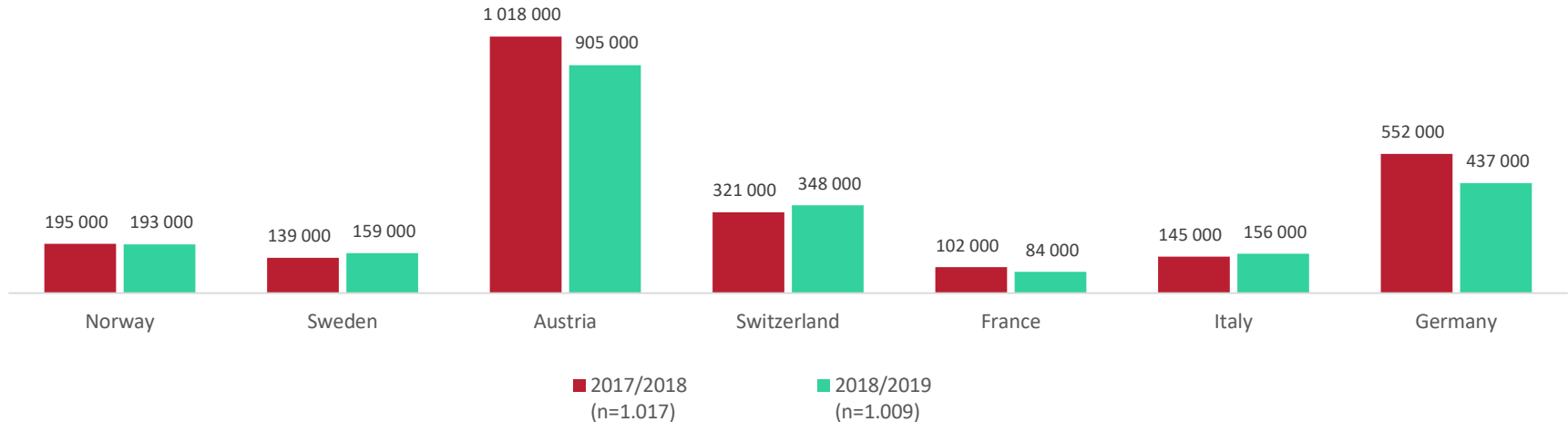
## KEY FINDINGS:

It is estimated that just about 193.000 adult skiers from Northern Germany visited Norway during the past season, which is almost just as many as the previous season.

In comparison, it is estimated that the number of North German skiers visiting Austria dropped by almost 100.000 from 2017/2018 to 2018/2019. However, the number of visits to Austria remains on a high level with an estimated 905.000 North German skiers visiting the country in the last season.



Number of ski tourists from Germany visiting the country last season



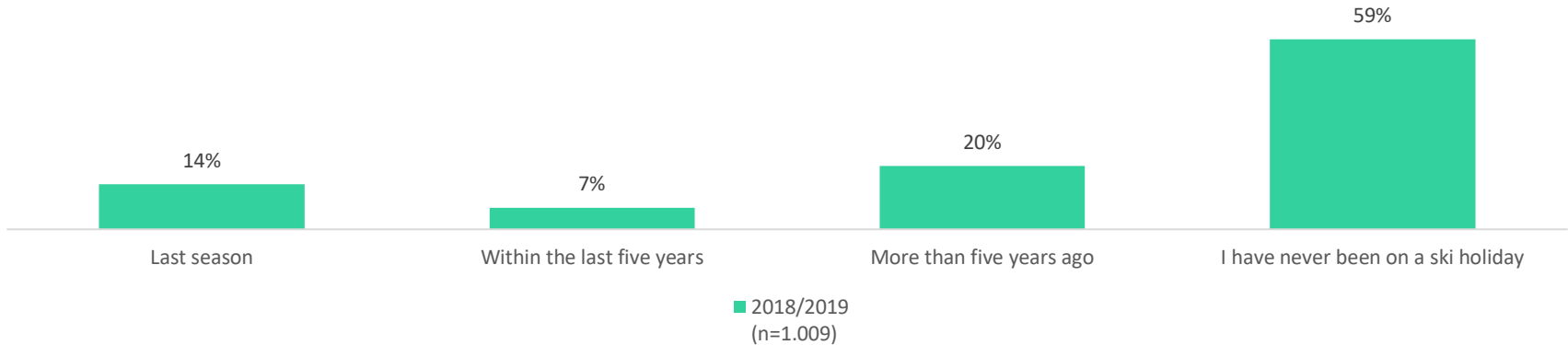
# ABOUT 20% OF THE GERMANS HAVE BEEN ON A SKI HOLIDAY WITHIN THE LAST FIVE YEARS


## KEY FINDINGS:

Around 21% of Germans living in Northern Germany have been skiing at least once within the past five years. Just about as many have been skiing at least once earlier than five years ago, while 59% have never been on a ski holiday.



Share of Germans who have been on a ski holiday





**THEME 3: TOURIST  
CHARACTERISTIC**

# CHARACTERISTICS OF A GERMAN SKI TOURIST

The North German ski tourists are 40 years old in average, and almost half of them have kids under 18.

29% of the ski tourists went on more than one ski holiday in the past season.

About half of the ski tourists travel in groups of 4 persons or more, and 25% travel with at least one child under the age of 12.

Comparing with the other markets, a remarkably large share of the German skiers go cross country skiing (51%).



**40** years

Average years of age



**29%**

Have been on 2 ski holidays or more in the last season



**47%**

Have at least one child at home under the age of 18



**25%**

Travel with at least one child under the age of 12



**52%**

Travel in groups of 4 persons or more



**31%**

Are on short trips (1-4 overnight stays)



**64%**

Go alpine skiing or snowboarding



**51%**

Go cross country skiing



**28%**

Go off-piste skiing

# CHARACTERISTICS OF A GERMAN SKI TOURIST IN NORWAY

More than half of the German ski tourists who visited Norway went on more than one ski holiday during the past season.

Most of them also visited Austria, while only a few visited Norway more than once (not displayed in the figure).

Comparing the German skiers in Norway with the other German skiers, the German skiers in Norway more often travel in larger groups (of 4 persons or more) and tend to stay on longer holidays.



Average years of age



Have been on 2 ski holidays or more in the last season



Have at least one child at home under the age of 18



Travel with at least one child under the age of 12



Travel in groups of 4 persons or more



Are on short trips (1-4 overnight stays)



Go alpine skiing or snowboarding



Go cross country skiing



Go off-piste skiing



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