

SWEDISH SKIERS

NORWAYS MARKET POSITION AMONG SWEDISH
SKIERS

INNOVATION NORWAY



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PURPOSE AND DATA

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Purpose

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

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

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

Data

This report is based on **4.169** online interviews with Swedish respondents aged 18 years or older. **1.023** 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 16th and July 7th, 2019.

The number of interviews in each region are:

- **Norr:** 209 (88 skiers)
- **Mitt:** 458 (169 skiers)
- **Öst:** 1.728 (345 skiers)
- **Väst:** 745 (223 skiers)
- **Syd:** 882 (198 skiers)

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

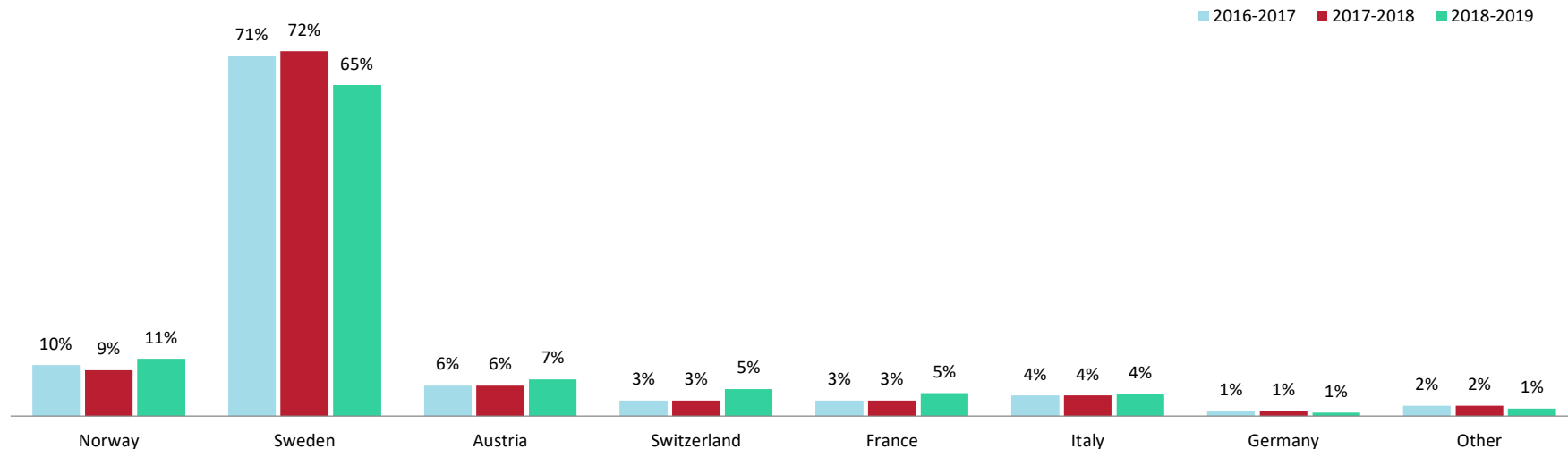
NORWAY'S MARKET SHARE REMAINS UNCHANGED ON THE SWEDISH MARKET

KEY FINDINGS:

Last season, Norway's share of the Swedish ski holidays was 11%, which is about the same level as the previous two seasons. The majority of the Swedish ski holidays are held within Sweden. However, Sweden's market share seems to have decreased remarkably from 2017/2018 to 2018/2019.



Market share as percentages of travels



NORWAY'S MARKET SHARE REMAINS UNCHANGED ON THE SWEDISH MARKET

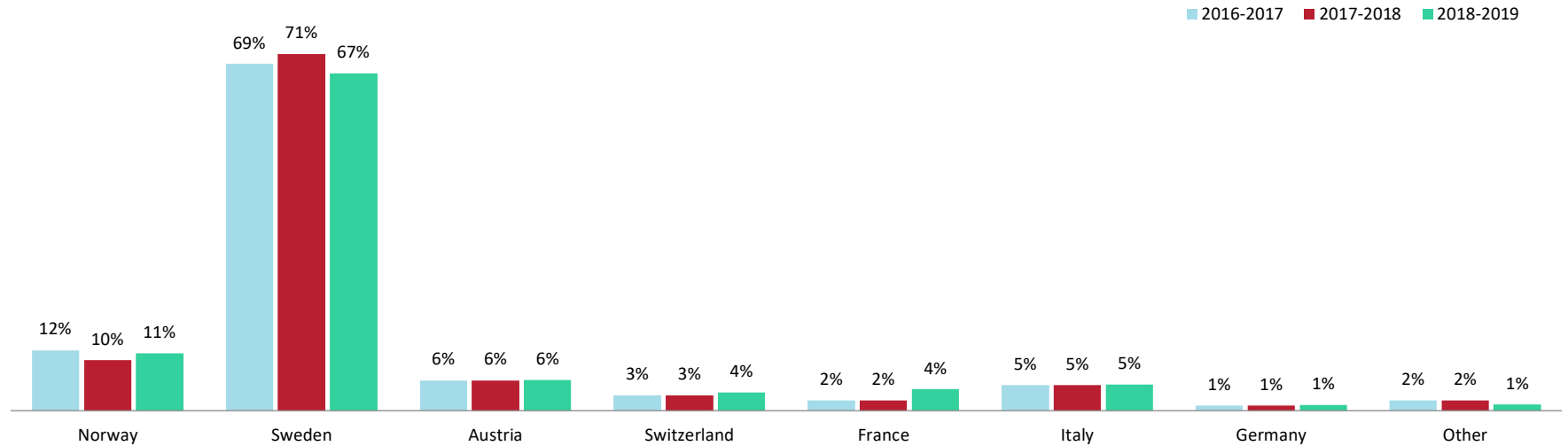
KEY FINDINGS:

The distribution of ski travellers is very similar to the distribution of ski travels. 2 of 3 ski travellers went skiing within Sweden, while 11% visited Norway.

Remarkably few Swedish ski tourists visit destinations like Austria and Switzerland, which are among the favourite destinations on the Danish ski market.



Market share as percentages of travellers



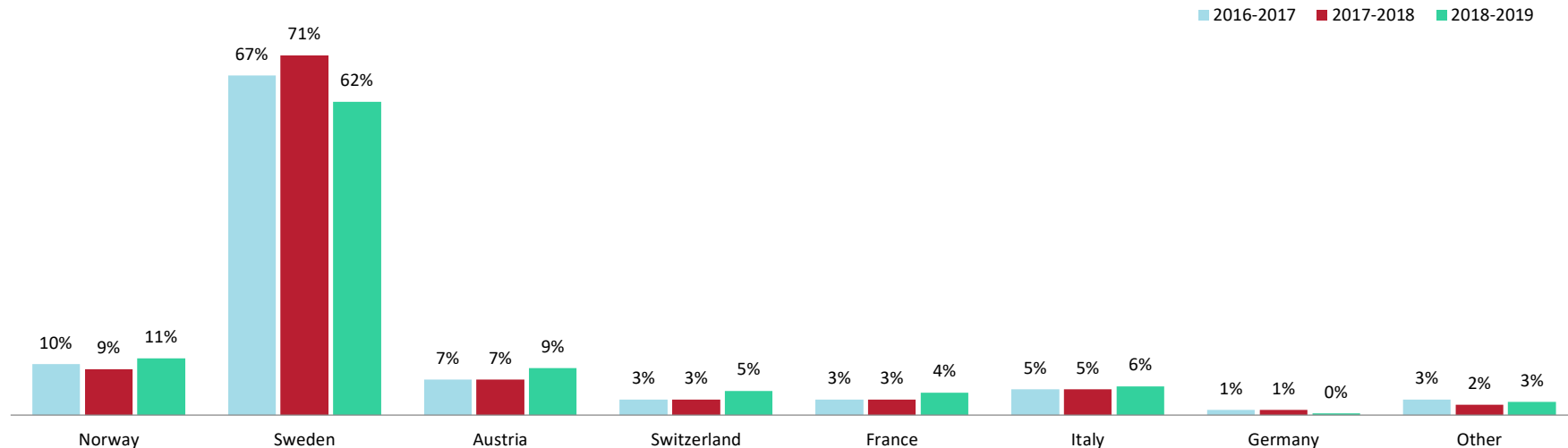
NORWAY'S MARKET SHARE REMAINS UNCHANGED ON THE SWEDISH MARKET

KEY FINDINGS:

When looking at the distribution of the total number of nights spent on ski holidays, Austria holds a slightly larger market share, while Sweden's market share is smaller than when looking at travels and travellers. This is related to the fact that the Swedish skiers tend to go on shorter ski holidays in Sweden than in Austria.



Market share as percentages of nights spent



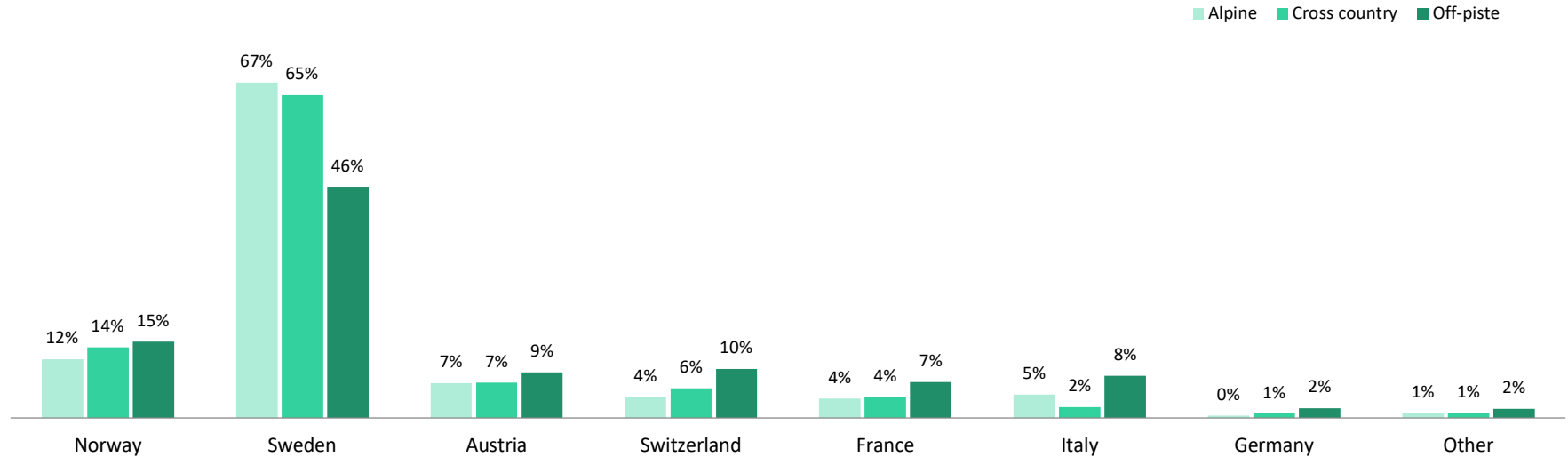
NORWAY HOLDS A LARGER MARKET SHARE AMONG SWEDISH OFF-PISTE SKIERS

KEY FINDINGS:

When looking at last season's market shares across different types of skiing, it is seen that Norway holds a slightly greater market share among off-piste skiers than alpine skiers.



Market share of different skiing types as percentages of travels





**THEME 2: PREVIOUS AND
FUTURISTIC VISITOR
INTENTION**

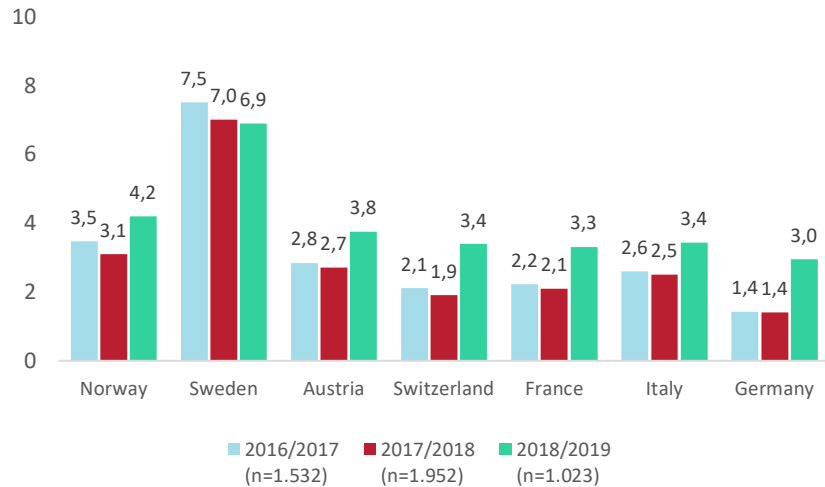
SWEDISH SKIERS ARE MORE LIKELY TO TRAVEL ABROAD IN THE FUTURE

KEY FINDINGS:

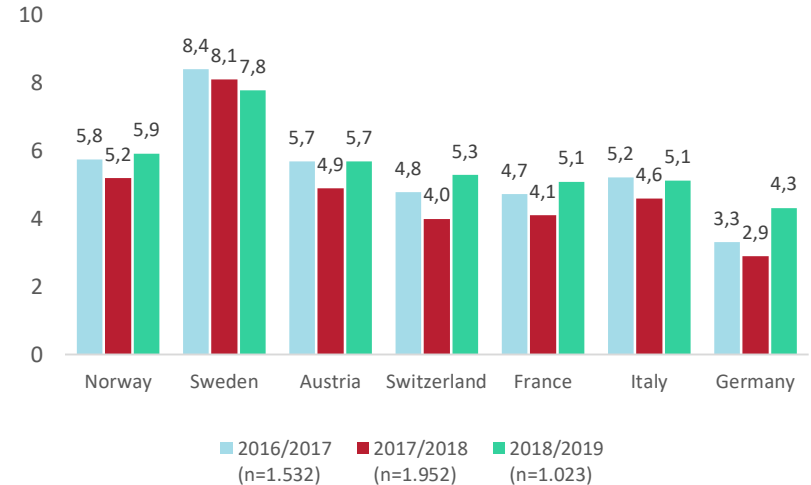
The Swedish ski tourists generally speaking find it most likely to go skiing in Sweden, when asking about next season as well as in the future. However, new travel patterns may be on the rise, as Swedes now find it less likely to choose Sweden as their future ski destination than they did two years ago. Instead, they find it more likely to visit destinations abroad, including Norway.



Average probability that Swedish ski tourists visit each country next season



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



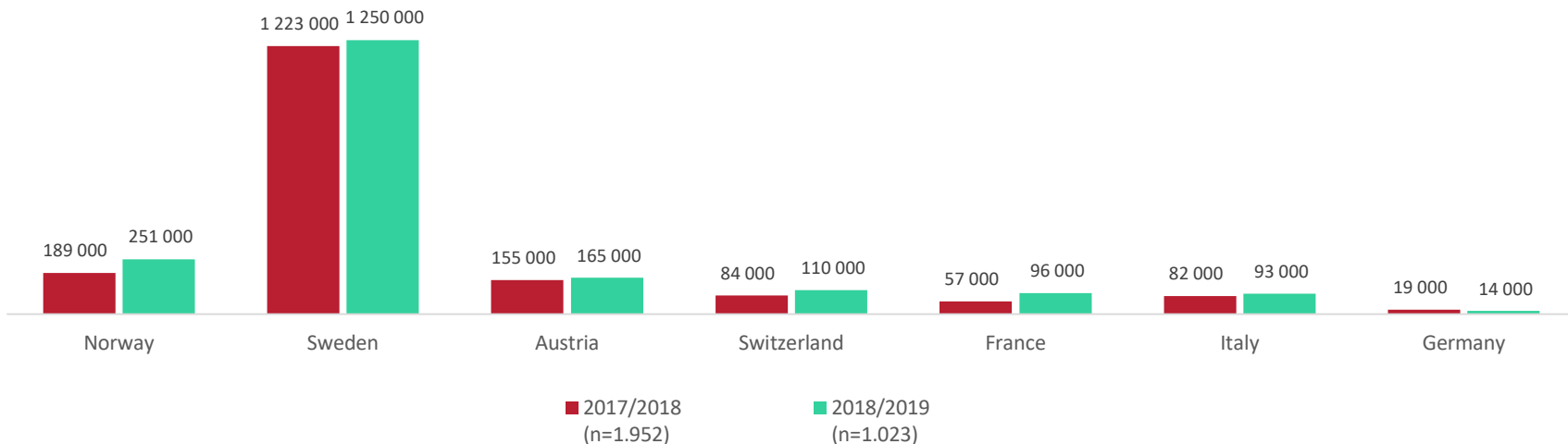
ABOUT 250.000 SWEDES WENT SKIING IN NORWAY IN THE LAST SEASON

KEY FINDINGS:

Just about 250.000 Swedish ski tourists above the age of 18 went skiing in Norway during the past season. This corresponds to an estimated increase of approximately 60.000 persons. About five times as many went skiing within Sweden.



Number of ski tourists from Sweden visiting the country last season



ABOUT 31% OF THE SWEDES HAVE BEEN SKIING WITHIN THE PAST FIVE YEARS

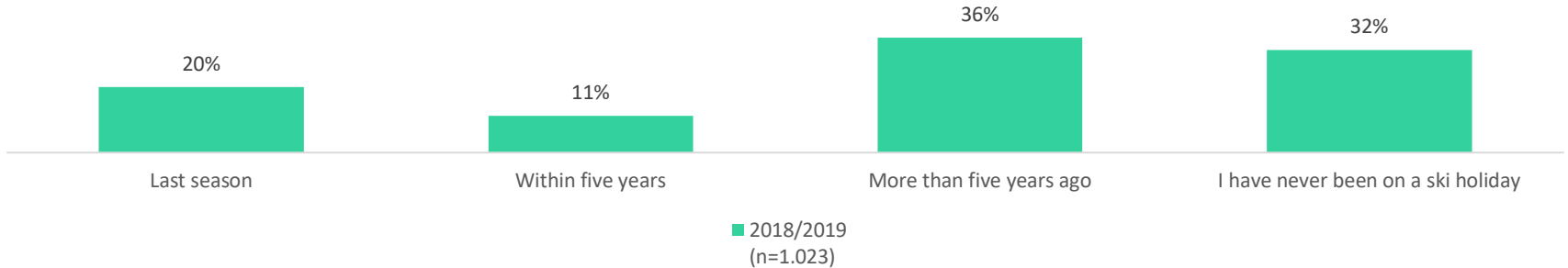
KEY FINDINGS:

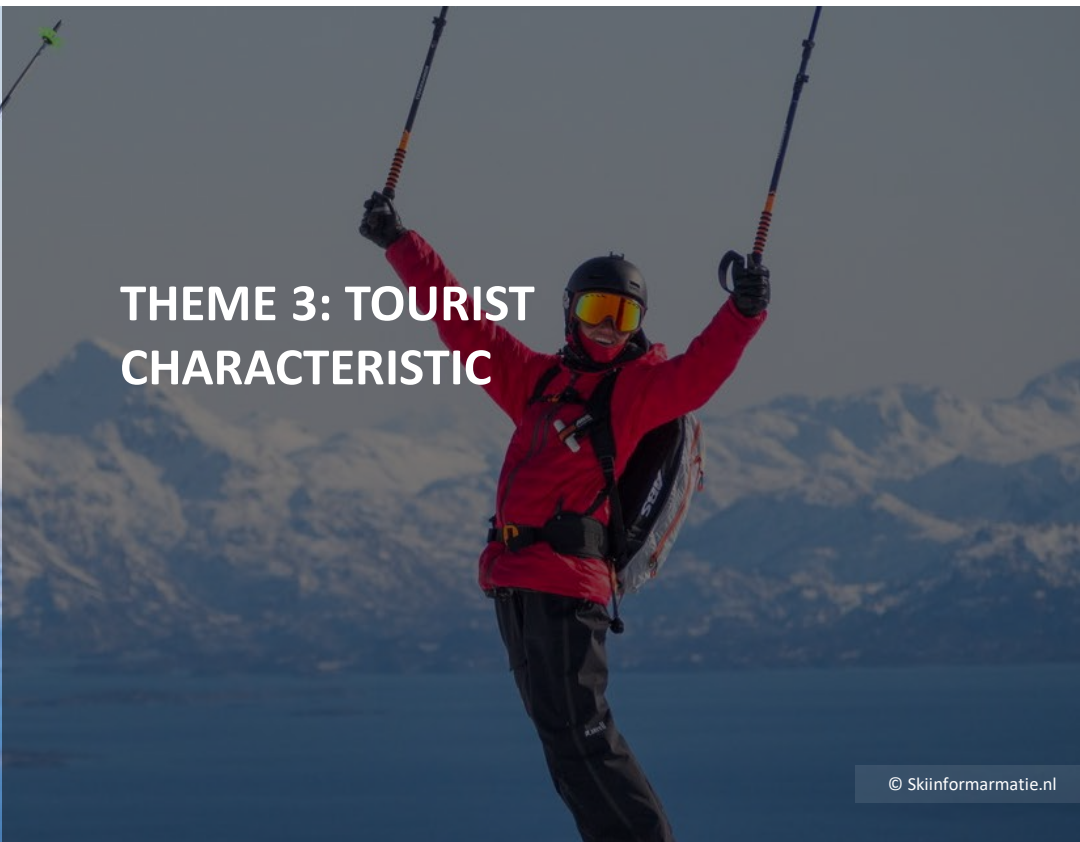
Around 31% of the Swedes have been on at least one ski holiday within the past five years. More than half of them went skiing in the last season.

36% have previously been on a ski holiday (but not within the past five years), and 32% have never been on a ski holiday.



Share of Swedes who have been on a ski holiday





THEME 3: TOURIST CHARACTERISTIC

CHARACTERISTICS OF A SWEDISH SKI TOURIST

31% of the Swedish ski tourists went skiing more than once during the past season.

62% of the Swedish ski tourists went in groups of 4 persons or more. In 28% of the cases, at least one child under the age of 12 was in the group.

70% of the Swedes went alpine skiing or snowboarding at least once, which makes alpine skiing the most popular type of skiing on the Swedish market.



41 years

Average years of age



31%

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



50%

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



28%

Travel with at least one child under the age of 12



62%

Travel in groups of 4 persons or more



56%

Are on short trips (1-4 overnight stays)



70%

Go alpine skiing or snowboarding



46%

Go cross country skiing



22%

Go off-piste skiing

CHARACTERISTICS OF A SWEDISH SKI TOURIST IN NORWAY

More than half of Swedish ski tourists who went skiing in Norway, went on more than one ski holiday during the past season. Most of them went skiing in Sweden on the other ski holiday(s).

Looking at the other facts, the Swedish ski tourists in Norway are very similar to the average Swedish ski tourist across the destinations.



38 years

Average years of age



56%

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



48%

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



24%

Travel with at least one child under the age of 12



65%

Travel in groups of 4 persons or more



56%

Are on short trips (1-4 overnight stays)



68%

Go alpine skiing or snowboarding



51%

Go cross country skiing



29%

Go off-piste skiing



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