

**Norway's Tourist Barometer**  
**Forecast for Norwegian and foreign**  
**holiday- and leisure traffic in Norway for the**  
**2018 winter season**

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## Innovation Norway's forecasts are clear; Optimism at the start of the year's winter season

- The expert panel composed of representatives from the Norwegian and foreign tourism industry are optimistic at the start of this year's winter season.
- 52 percent of those who took part in the survey think that this winter will be better than last year's, and 42 percent think it will be similar. Only six percent expect a decline.
- Norway is popular, the low Norwegian krone exchange rate and an early Easter are contributory factors.
- Winter 2017 was the first winter season with a small decrease owing to the late snowfall and poor skiing conditions at many locations in the country. A decline in visitors from Denmark, which is the highest volume market in winter, was the decisive factor in the winter season not being as good as previously predicted.
- Despite the decline, the number of overnight stays by foreign guests was 11 percent higher than in 2013.



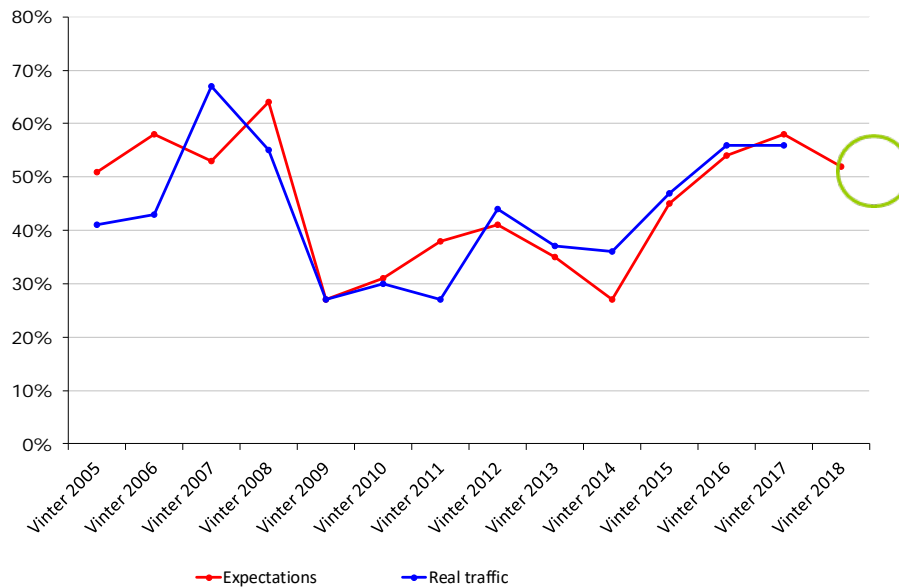
Photo: Bård Løken - Visitnorway.com

- There is great optimism from all the markets in which Innovation Norway runs a winter campaign. Both from the major skiing markets, but also from smaller volume markets, that primarily come to Norway to experience the Northern Lights. Although the Swedish and Danish ski segments are still the largest in winter, the Northern Lights initiative, which is an important joint effort between the tourism industry and Innovation Norway, has resulted in a more robust Norwegian winter product 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.
- The most decisive factor for the winter season is that the Danes continue to come. Therefore, it is encouraging that the Danish respondents express optimism. A great deal is attributable to the low Norwegian krone exchange rate. The number of Danish overnight stays during the winter season has been shown to follow the krone exchange rate to some extent. A weak krone leads to more Danish overnight stays, and vice versa.

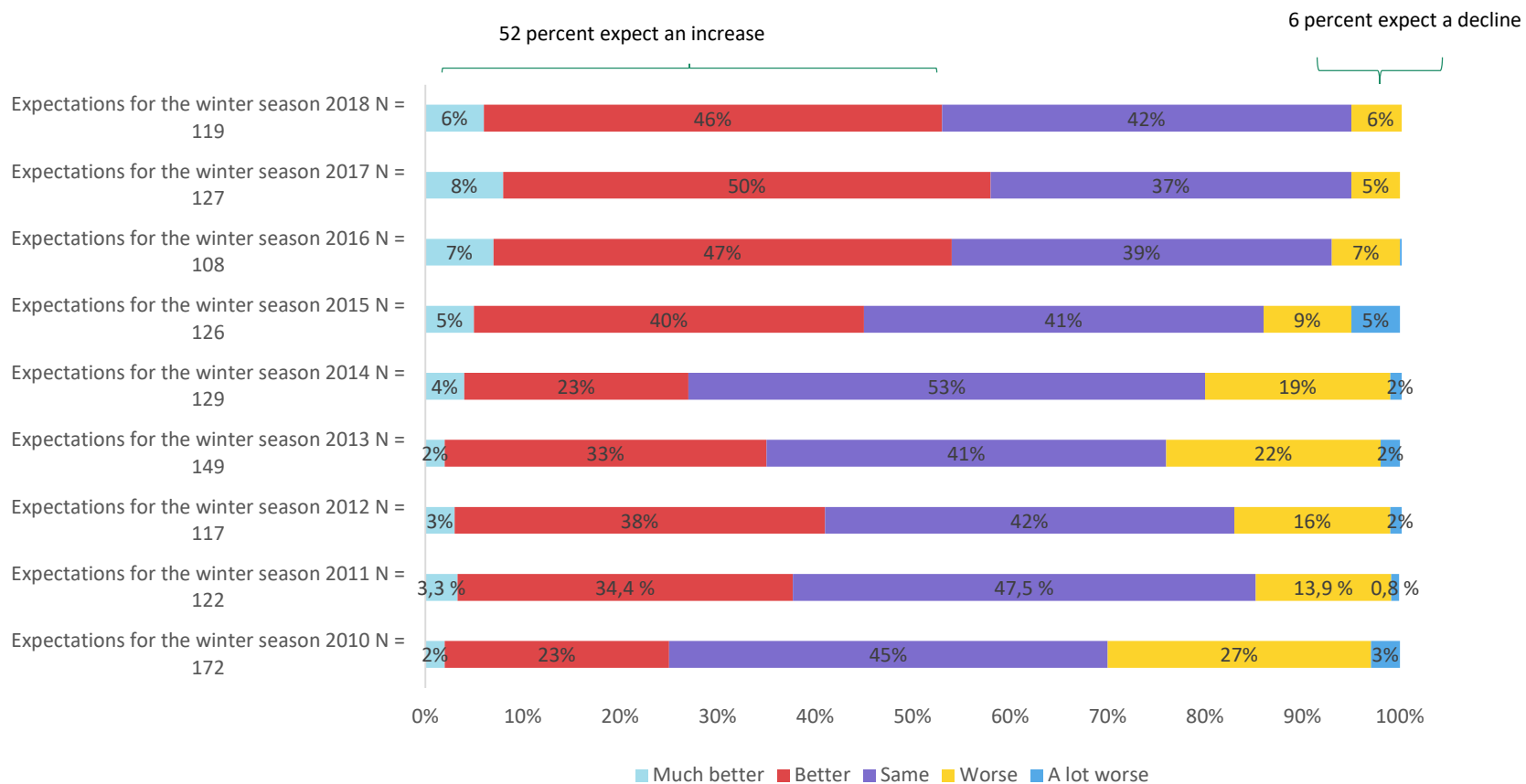
# Positive expectations for the winter traffic

The ratio between anticipated- and actual winter traffic

Question:  
What are your expectations to traffic to Norway during the forthcoming winter season compared to the previous winter season?



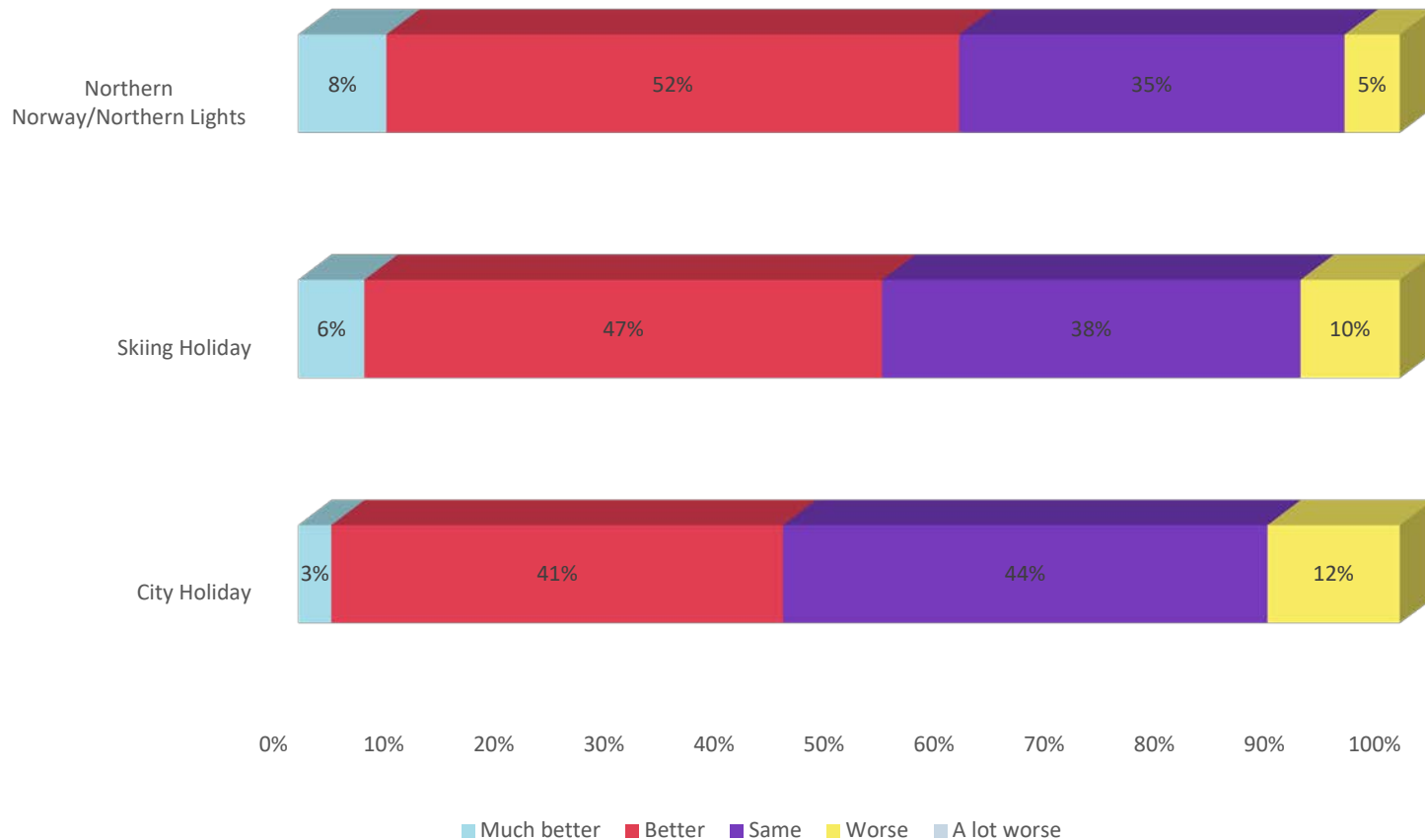
# Expectations over time



# Optimism among providers that aim at different target groups

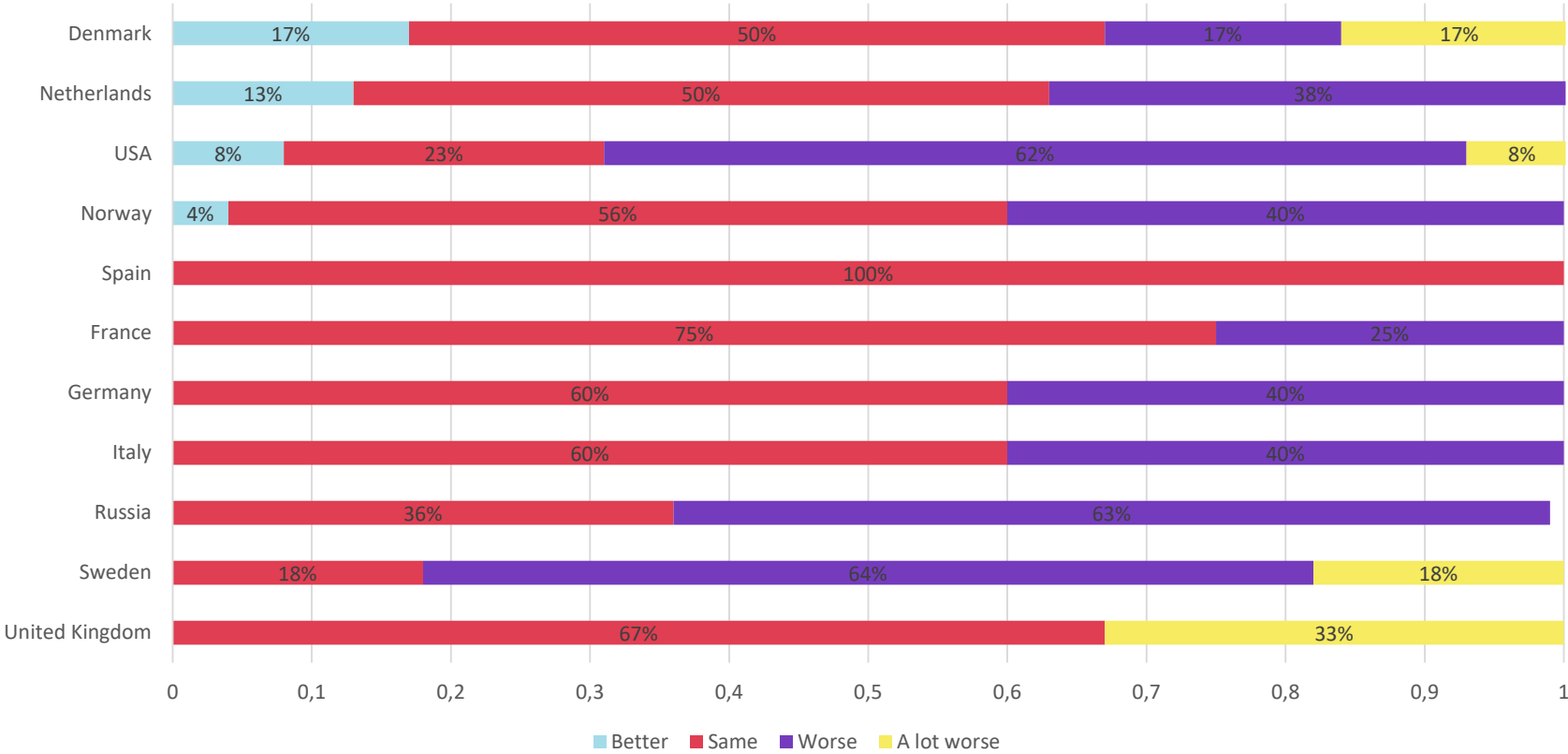
Question:

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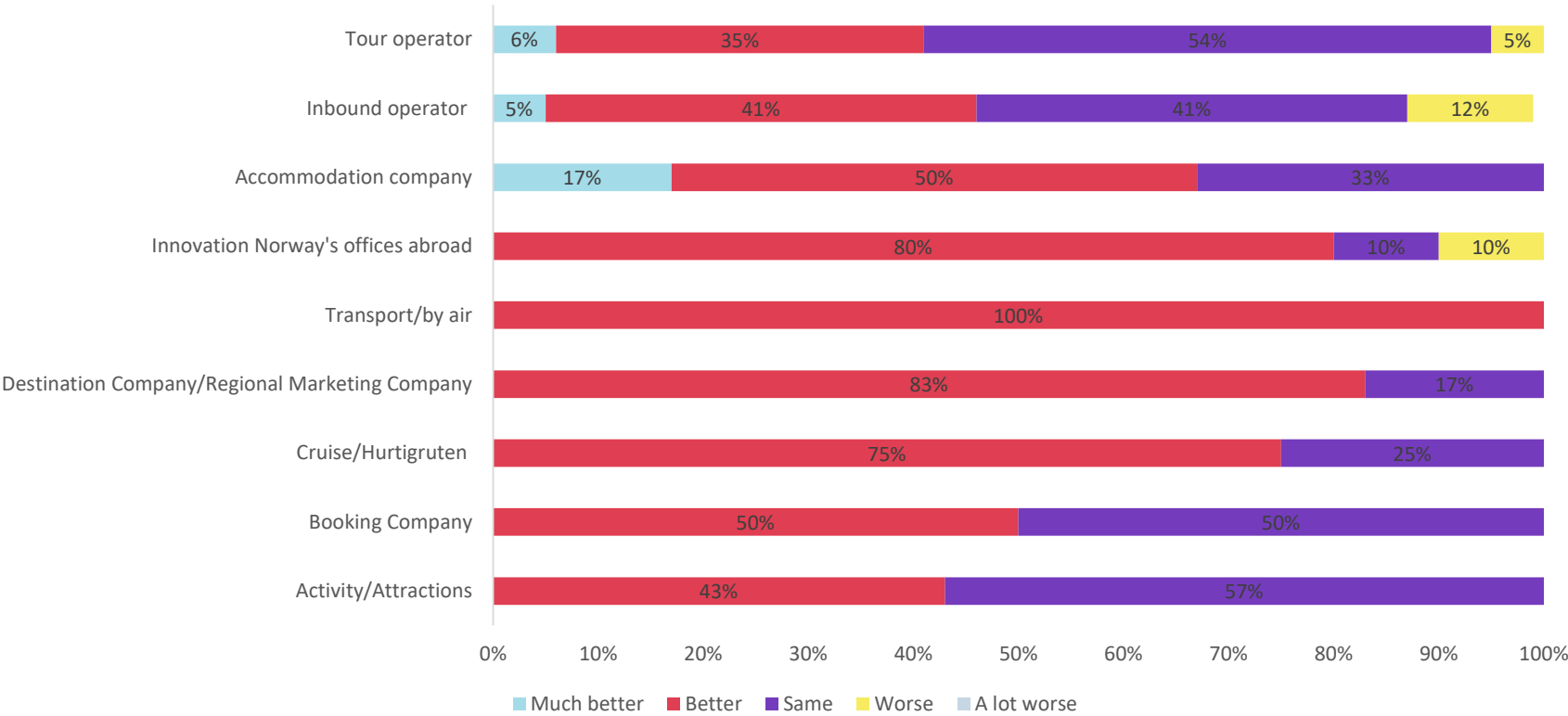
# Expectation per market

Question:  
What are your expectations to traffic to Norway  
for the forthcoming winter season compared to the previous winter season?



# Expectation per sector

Question:  
What are your expectations to traffic to Norway  
for the forthcoming winter season compared to the previous winter season?





# A weaker Norwegian kroner exchange rate means more foreign overnight stays

Hotel overnight stays - foreign guests

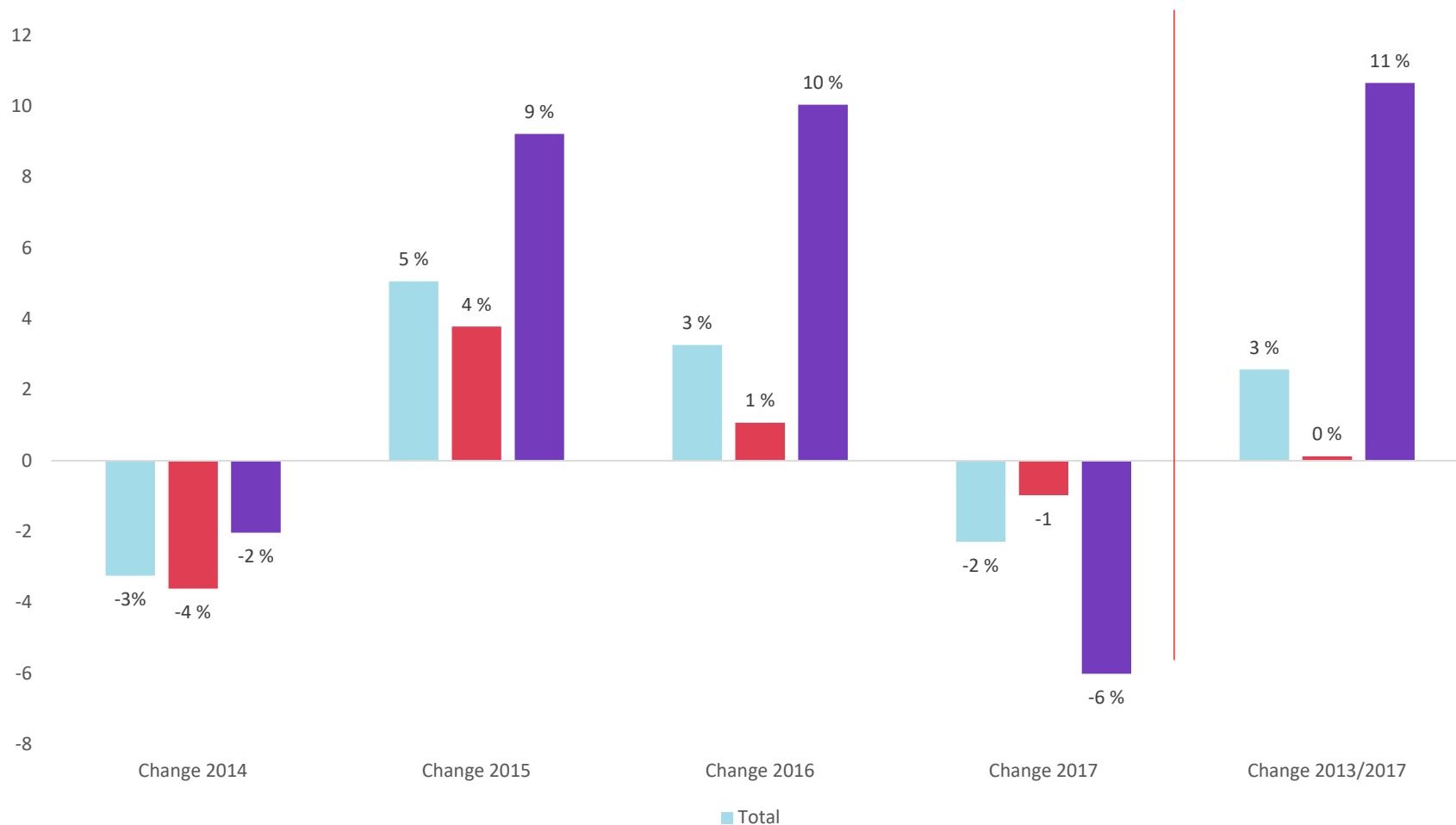
Trade-weighted exchange rate index %



# A retrospective view of previous winter seasons

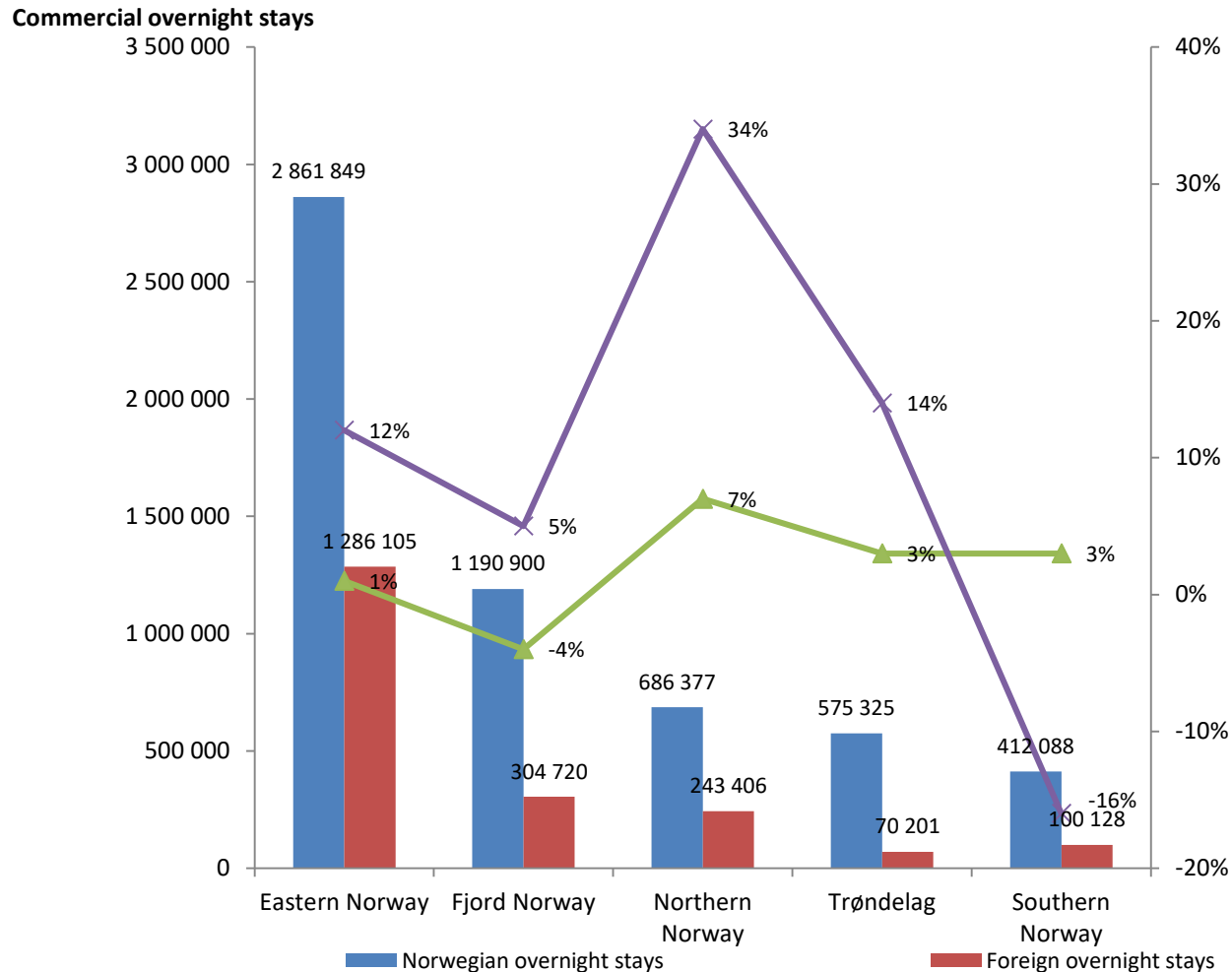
## Winter season 2014-2017

After two winter seasons of growth, it stagnated last year. The winter of 2017 was characterized by shortage of snow and Easter was late. Still, the number of overnight stays was three percent higher than in 2013. Thanks to 11 percent more foreign guests.



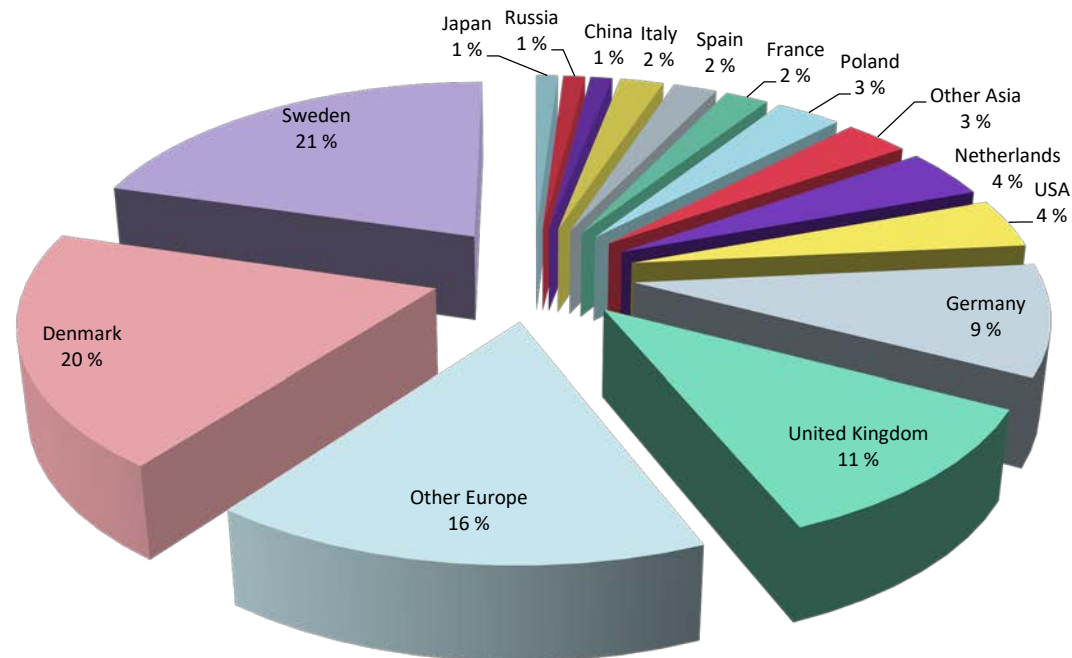
# Winter season 2016

Northern Norway had the highest percentage growth in both Norwegian and foreign overnight stays for the winter season 2015-2016.



For the first time, Denmark lost its top position as the largest winter market, and had to see itself beaten by Sweden.

## Composition of foreign overnight stays, winter season 2016



## Background and methodology

- An electronic questionnaire was sent out and was accessible during the period 15 November to 15 December 2017.
- 120 organisations participated in the survey.
- The purpose of the Tourist Barometer is to provide an overview of the anticipated growth in traffic, broken down by market and sector.
- 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, prior to the summer and winter seasons.
- This is the 30th time the Norwegian Tourist Barometer has been conducted.



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