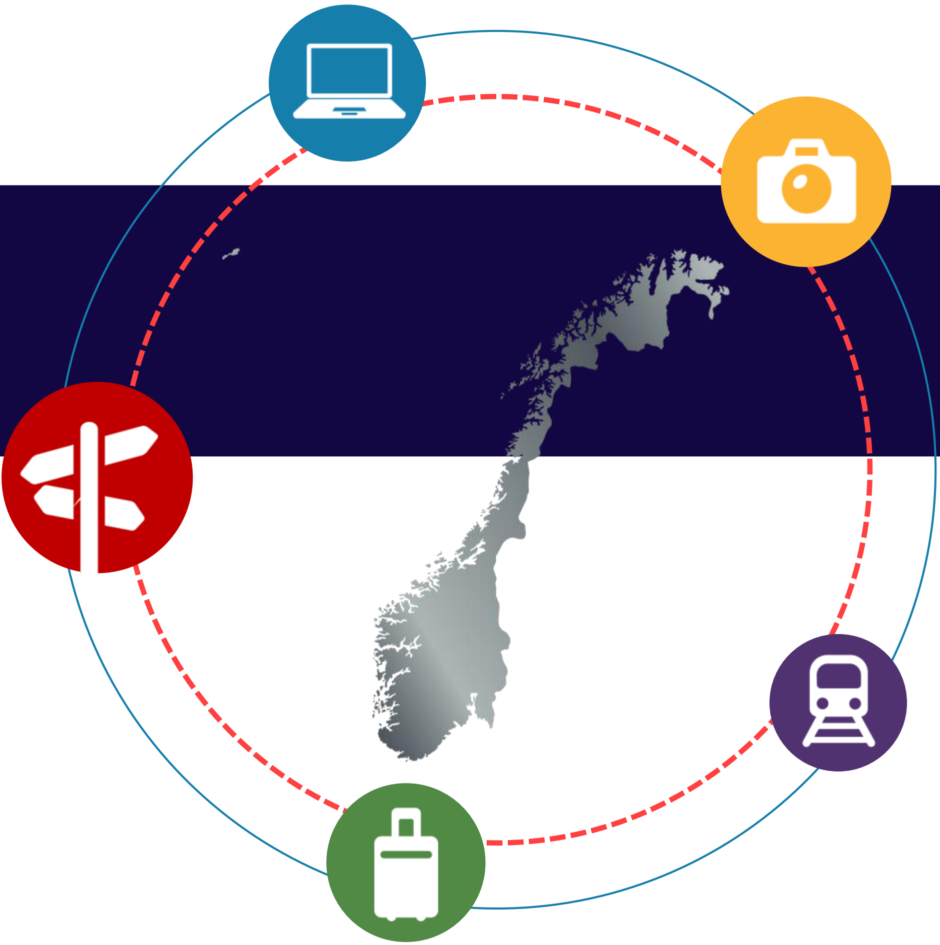
Market and Trade Profile: Norway



Norway

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Norwegian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Norwegian visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Norwegian consumer trends, booking, planning and further travel behaviour of this source market. Motivations for Norwegians to travel to Britain are also highlighted.
- **Chapter 3: Access and travel trade** shows how the Norwegianstravel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Norwegian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents

Chapter 1:
Inbound market statistics

Chapter 1: Inbound market statistics

Chapter summary

- The Norwegian outbound market is forecasted to account for almost 15 million trips abroad with at least one overnight stay by 2025. The UK was the 4th most popular destination for such trips in 2016.
- The Norwegians rank globally in 22nd place for international tourism expenditure with US$15.9bn.
- Norway was the 16th largest inbound source market for the UK for volume and 15th most valuable for spending in 2016.
- The Norwegian source market has a good seasonal spread with Q4 (Oct-Dec) and Q2 (Apr-Jun) the strongest quarters.
- 94% of departing Norwegians are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short break.

2016: £411m spend in UK

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips), UNWTO, VisitBritain/IPSOS 2016, CAA 2016 based on leisure visitors

Chapter 1.1: Key statistics

Key insights

- Norway is Britain's 16th largest source market in terms of visits and 15th most valuable for visitor spending (2016).
- 44% of spending came from Norwegian holiday trips and 19% from business visits, 18% from visits to friends and/or relatives and 17% from visits for miscellaneous purposes.
- Holiday and business visits from Norway achieved record levels in 2014. Since then, there has been a decline in visits across journey purposes in recent years, likely as a result of economic struggles.
- London is the leading destination for Norwegians a trip to Britain but North West, Scotland and the South East are also popular (based on average nights spent in the UK in 2014-2016).
- The most popular activities undertaken by Norwegian travellers in Britain include dining in a restaurant, shopping, going to the pub, sightseeing, socialising with locals and visiting parks and gardens.

The UK was 4th most popular destination for Norwegian outbound travel (2016)

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips)

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	15.9
Global rank for international tourism expenditure	22
Measure	**2016**
Number of outbound overnight visits (m)	10.1
Most visited destination	Sweden

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	609	2,589	281
2008	688	3,397	399
2009	573	2,573	314
2010	649	2,807	355
2011	739	3,442	523
2012	771	3,393	445
2013	838	3,703	529
2014	874	4,157	548
2015	771	3,552	426
2016	700	3,222	411
Share of UK total in 2016	1.9%	1.2%	1.8%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics (outbound overnight trips)

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	700	-9%	16
Nights (000s)	3,222	-9%	19
Spend (£m)	411	-3%	15

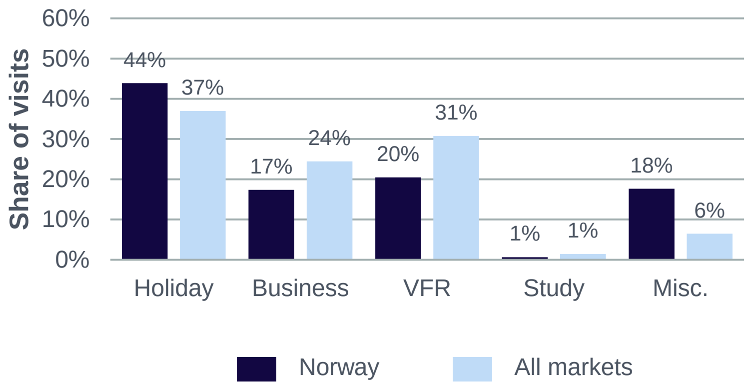
After a weaker performance in 2015, 2016 and earlier in 2017 most likely caused by difficult economic conditions in Norway, there were 171,000 visits to the UK in July-September 2017 (up 22% on the same period in 2016). If this trend continues, it will be a sign that the market is starting to rebound with better economic prospects positively influencing outbound travel.

Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	4	£134	£593
Business	3	£194	£631
Visiting Friends/ Relatives	6	£87	£509
All visits	5	£128	£587

1.1 Key statistics: journey purpose

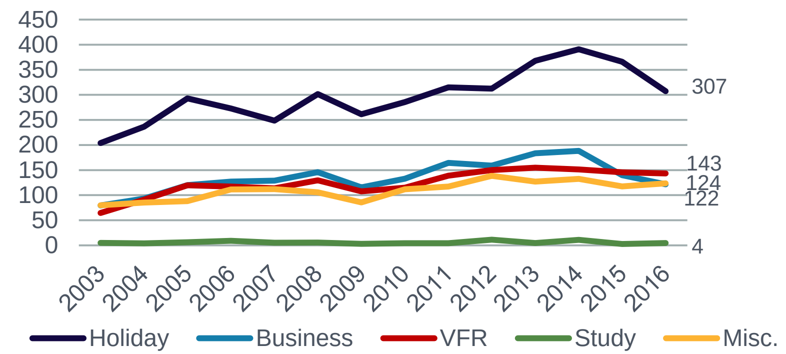
Journey purpose 2016



- In 2016, 44% of all visits to the UK from Norway were made for holiday purposes, followed by 20% made to visit friends and/or relatives.
- 82% of holiday visits from Norway to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average four times in the past ten years (a high visit frequency) and spent £2,513 in the UK in total, the fourth highest out of the European markets and compares to the average European holiday repeat visitor‘s spend of £1,626 in the same time.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015

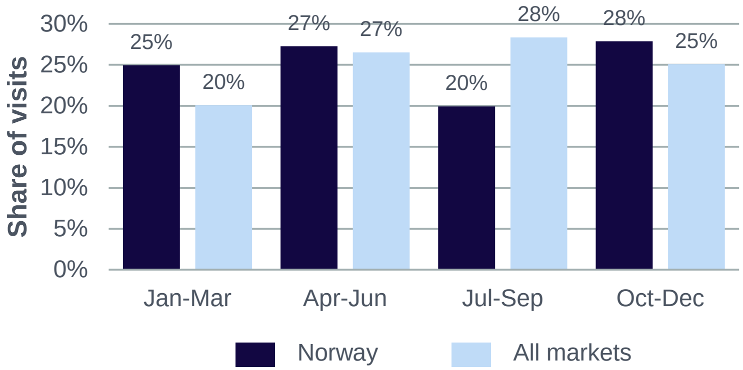
Journey purpose trend (visits 000s)



- Holiday visits lead in terms of volume of visits from the Norwegian market. In 2016, 44% of spending came courtesy of holiday visitors, 19% from business visits, 18% from visits to friends and/or relatives and 17% from visits for miscellaneous purposes.
- Holiday and business visits achieved record levels in 2014 prior to a decline in visits across journey purposes in recent years – likely due to the economy.
- 96% of those coming to the UK for business visits (excl. expats) had been to the UK before as had 89% of those coming to visit friends or relatives who live in the UK.

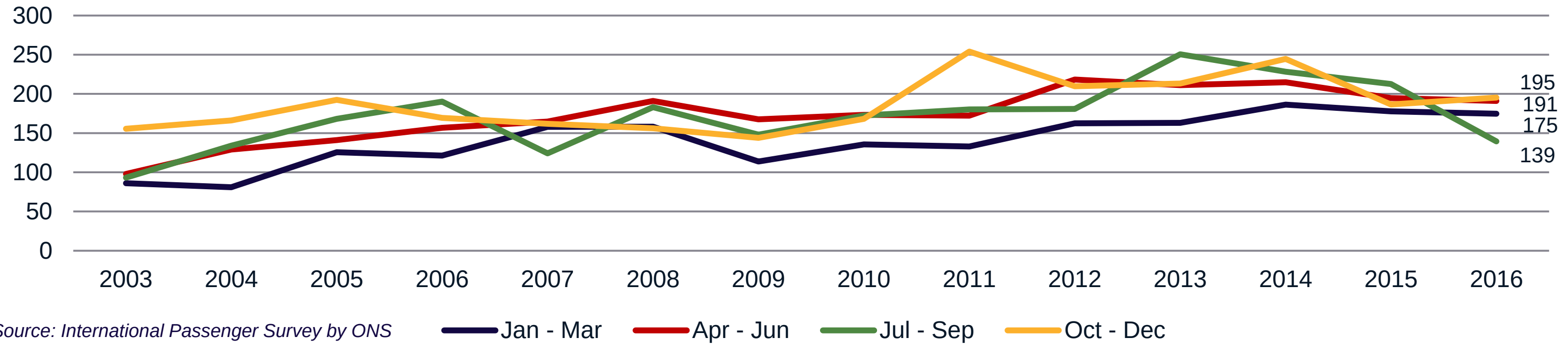
1.1 Key statistics: seasonality

Seasonality 2016



- In 2016, 28% of visits from Norway to the UK were made in the last quarter followed by 27% between April and June. The summer quarter, which is high season for many other markets, saw a below average share of Norwegian visits with 20%. 1 in 4 visits from Norway were made in the first quarter.
- The summer quarter, one of the most popular times for travel to the UK in recent years, has seen a decline since its peak in 2013 and was the smallest quarter by volume in 2016.

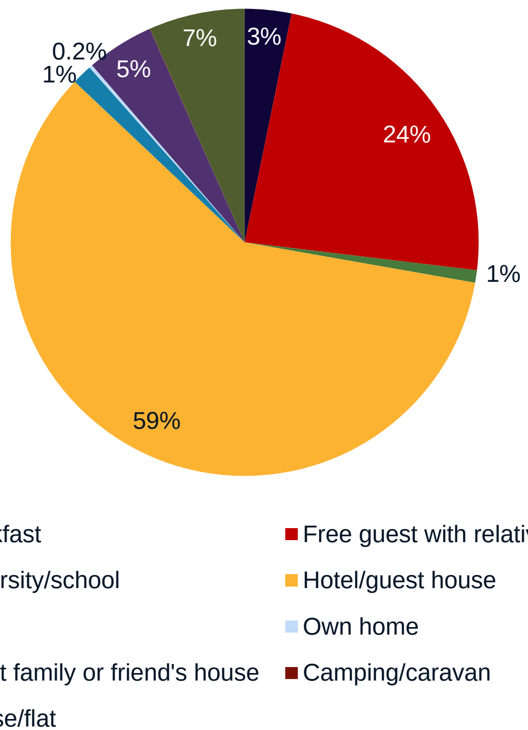
Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS

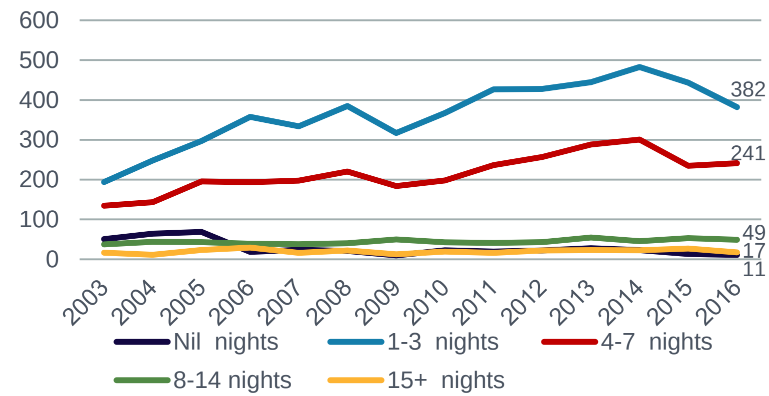
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, % share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Norwegian visitors.
- Two forms of accommodation dominate the picture with more than half of Norwegian visitor nights spent at a ‘hotel/guest house’ (59%) and 24% spent staying for free with relatives or friends who reside in the UK. A small share stayed in rented houses/flats, was a paying guest at a family or friend’s house or stayed at a bed & breakfast in 2016.

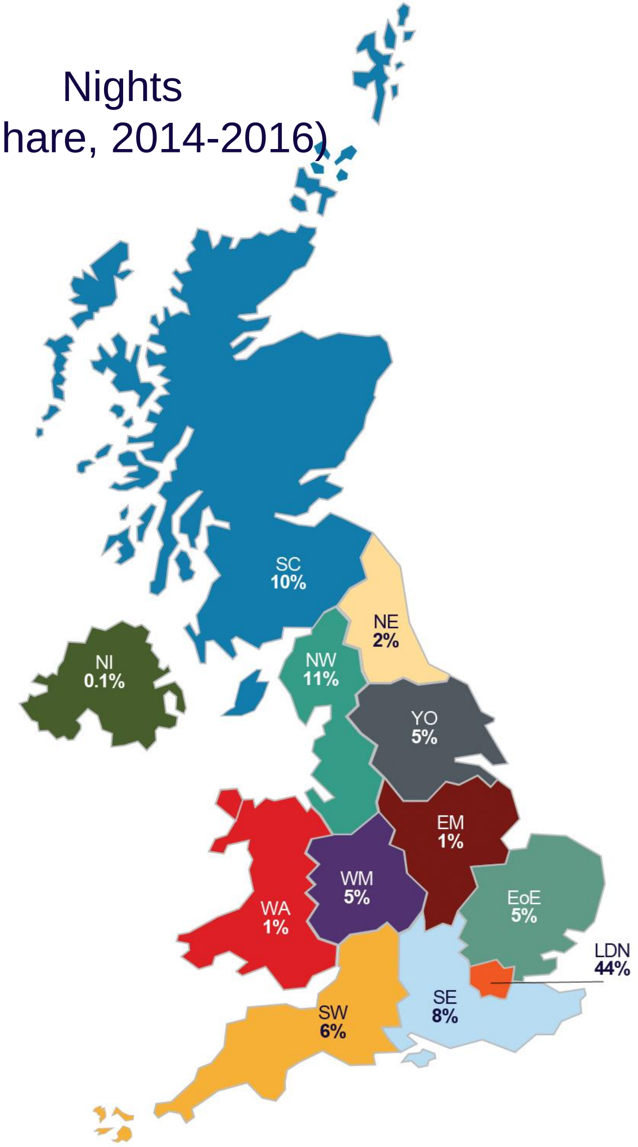
1.1 Key statistics: regional spread

Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	3,644	782
Scotland (SC)	380	95
Wales (WA)	48	7
Northern Ireland (NI)	2	1
London (LDN)	1,598	429
North East (NE)	84	17
North West (NW)	409	96
Yorkshire (YO)	176	22
West Midlands (WM)	174	20
East Midlands (EM)	48	8
East of England (EoE)	195	27
South West (SW)	215	30
South East (SE)	307	69
Nil nights (Nil)	N/A	16

Source: International Passenger Survey by ONS

Nights
(% share, 2014-2016)

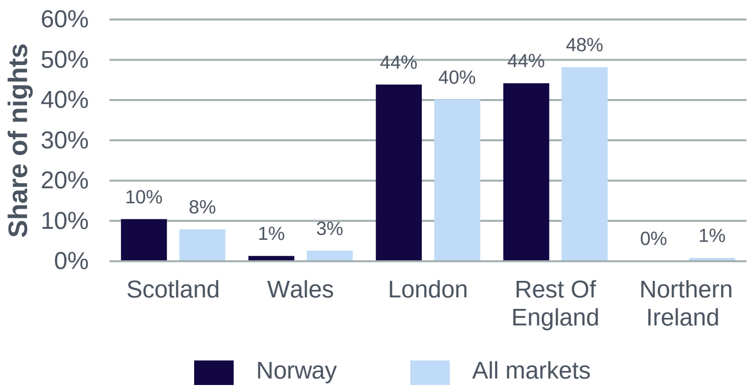


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

Town	Visits (000s, 2012-2016)
London	2,164
Edinburgh	233
Manchester	230
Liverpool	170
Aberdeen	168

Regional spread 2014-2016

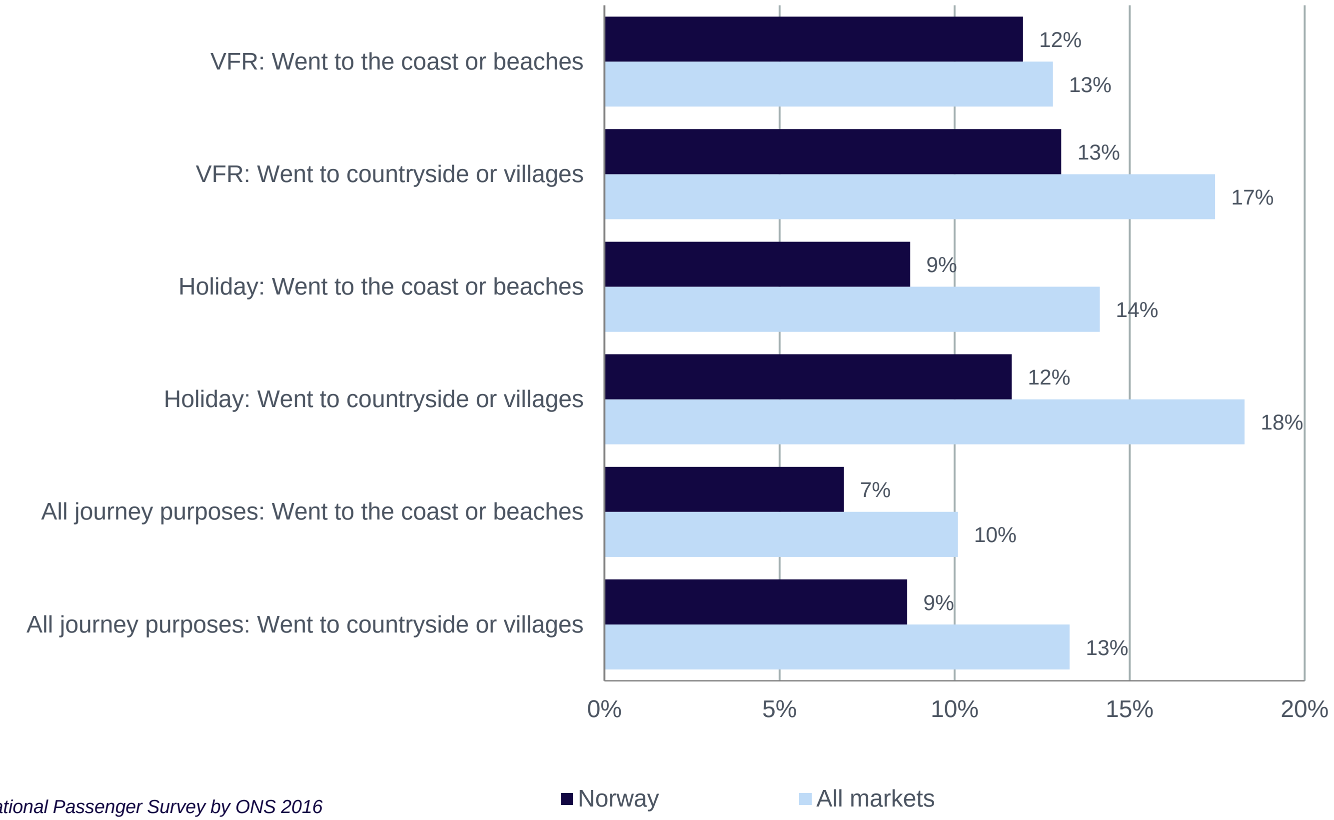


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

- London is the leading destination for a trip to Britain, accounting for 44% of visitor nights, but the North West, Scotland and the South East are also popular based on the average nights Norwegians spent in the UK in 2014-2016.
- Visitors from Norway have a slightly below average propensity to visit rural and coastal areas of Britain. Visits to family and/or friends tend to be most likely to feature this activity.
- 6% of visits from Norway were bought as part of a package or an all-inclusive tour which is in line with the all market average. Visits for miscellaneous journey purposes which includes sports have an above-average propensity to be booked as part of a package or an all-inclusive tour (please note ONS definition of package holiday on page 16).
- Transport within London is most commonly booked during their trip. Most other forms of transport are more typically bought during the trip rather than in advance, with the exception of car hire which one in ten Norwegian visitors book prior to their stay in Britain.

1.1 Key statistics: visits to coast, countryside and villages

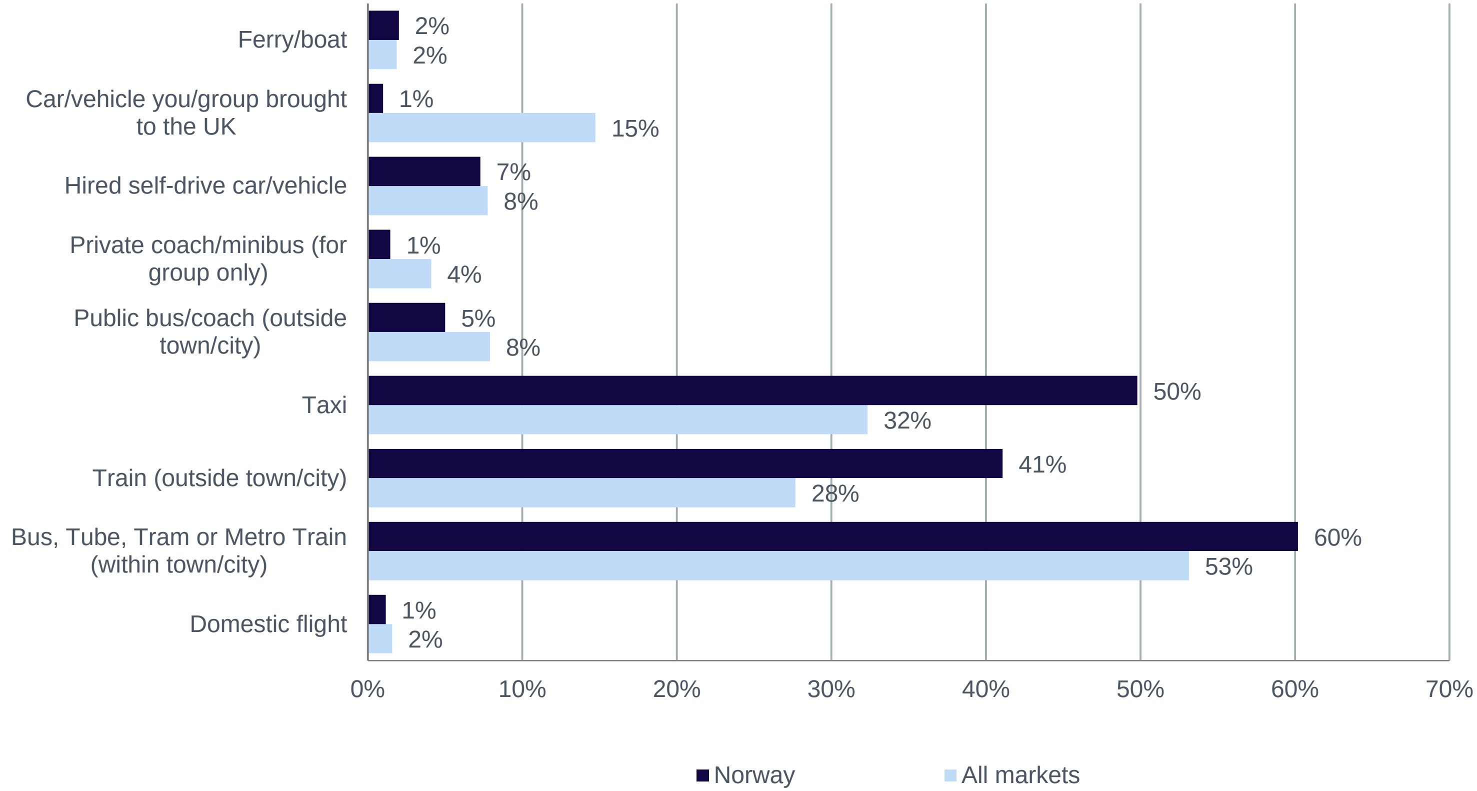
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

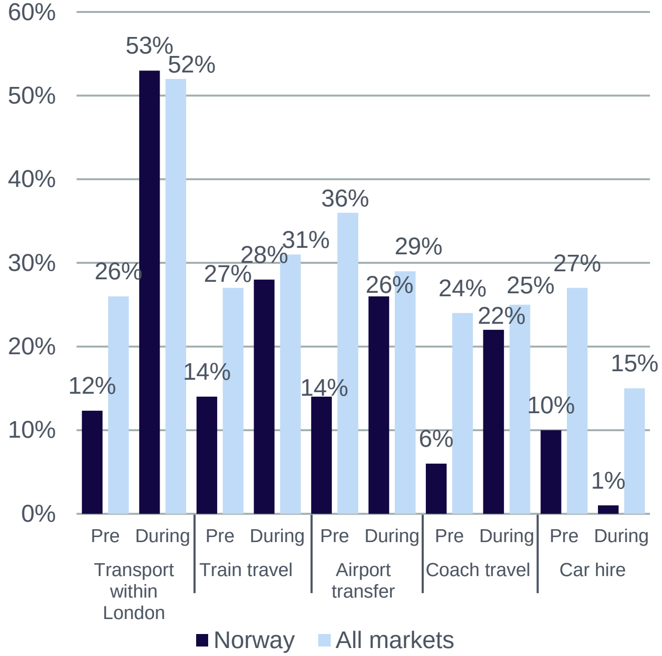
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS, 2013

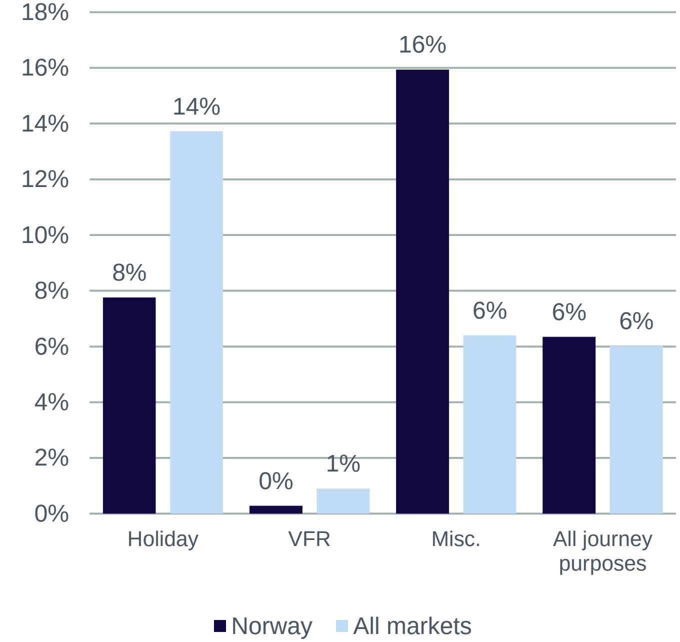
1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

1.2 Visitor demographics

Visitor characteristics

- There are considerably more male than female visitors from Norway for business and for miscellaneous trips.
- More than four-in-five holiday visitors are making a repeat visit to Britain (excl. UK nationals).
- Most visits from Norwegian residents to the UK were made by Norwegian nationals (87%), 6% by British nationals.
- 94% of departing Norwegian travellers are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.
- 90% of departing Norwegians felt ‘Very’ or ‘Extremely’ welcome in Britain.

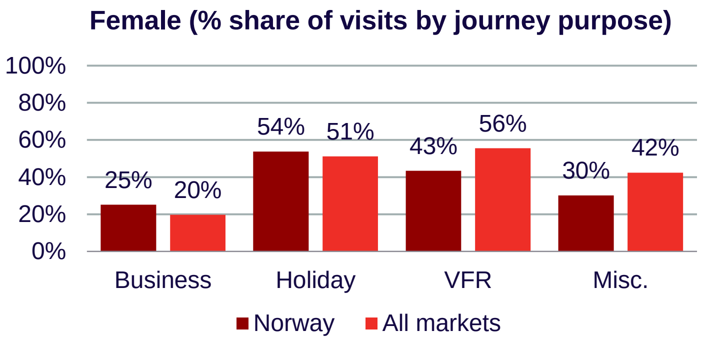
94%
‘Very’ or
‘Extremely’ likely
to recommend Britain

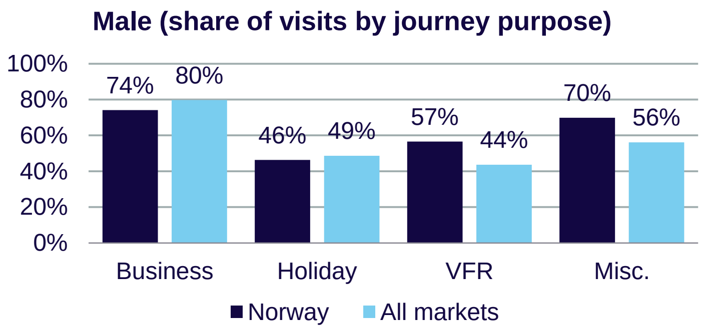
Source: International Passenger Survey by ONS, CAA 2016 based on leisure visitors

1.2 Visitor demographics: gender and age groups

Visitor demographics:

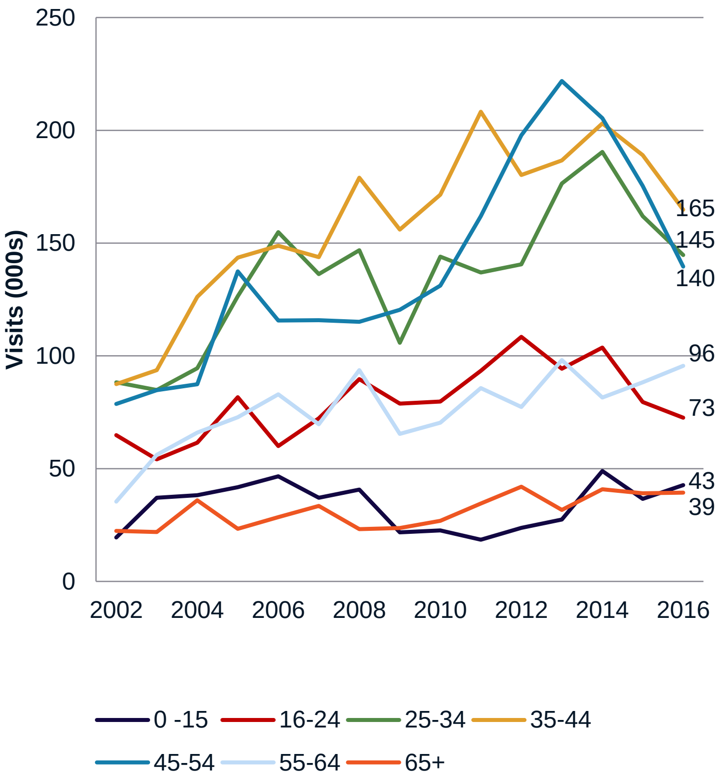
gender ratio of visits from Norway:
42% female, 57% male





Source: International Passenger Survey by ONS

Age group trend

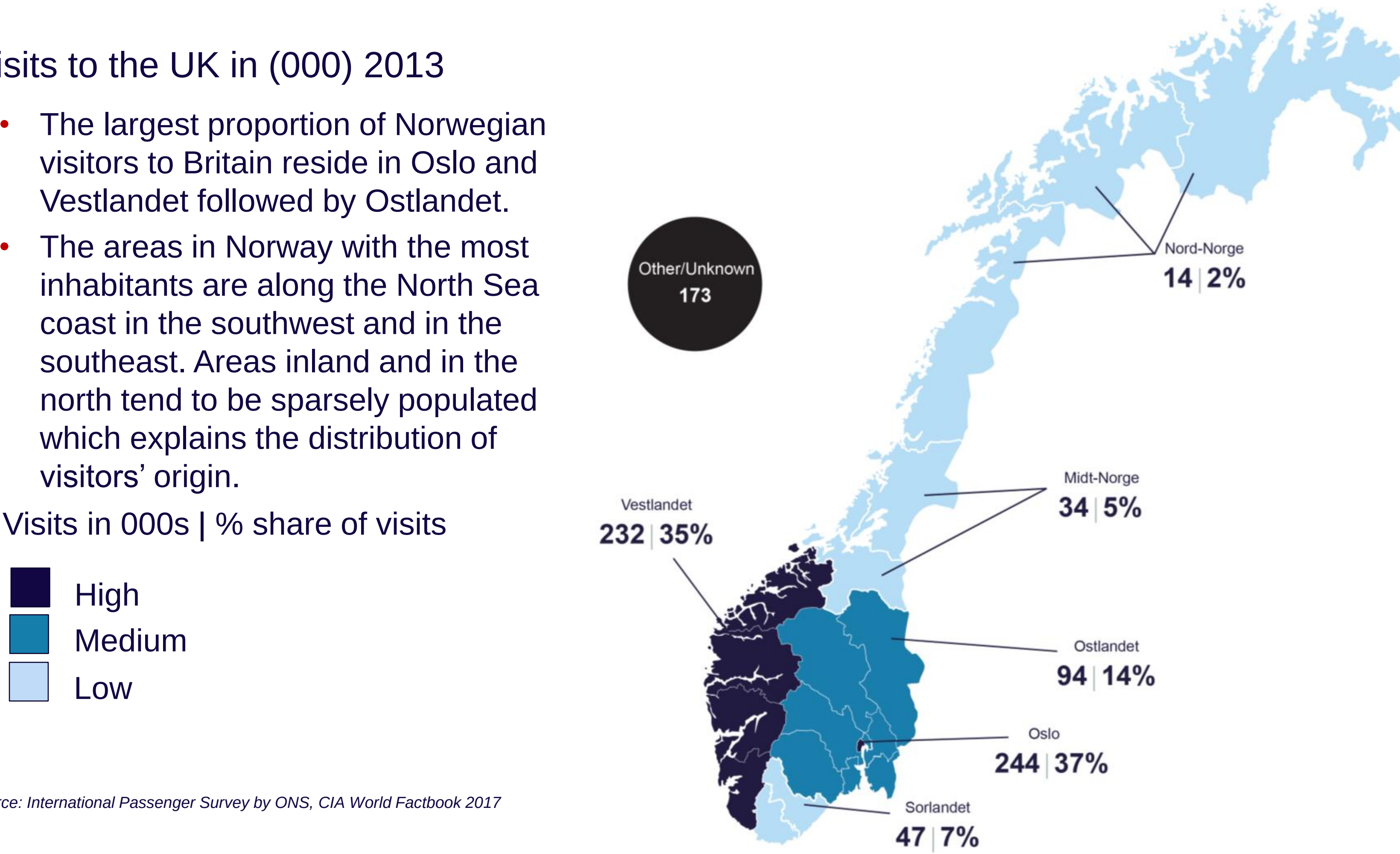


1.2 Visitor demographics: origin

Visits to the UK in (000) 2013

- The largest proportion of Norwegian visitors to Britain reside in Oslo and Vestlandet followed by Ostlandet.
- The areas in Norway with the most inhabitants are along the North Sea coast in the southwest and in the southeast. Areas inland and in the north tend to be sparsely populated which explains the distribution of visitors' origin.

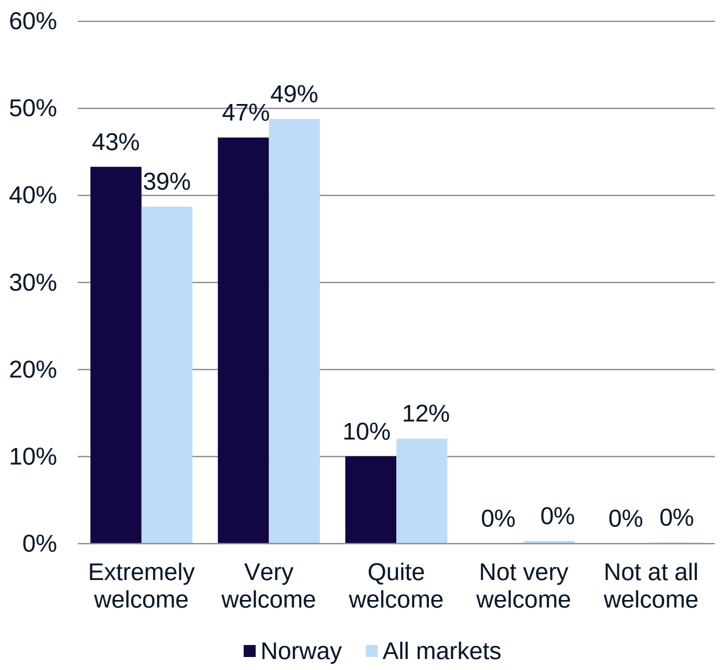
Visits in 000s | % share of visits



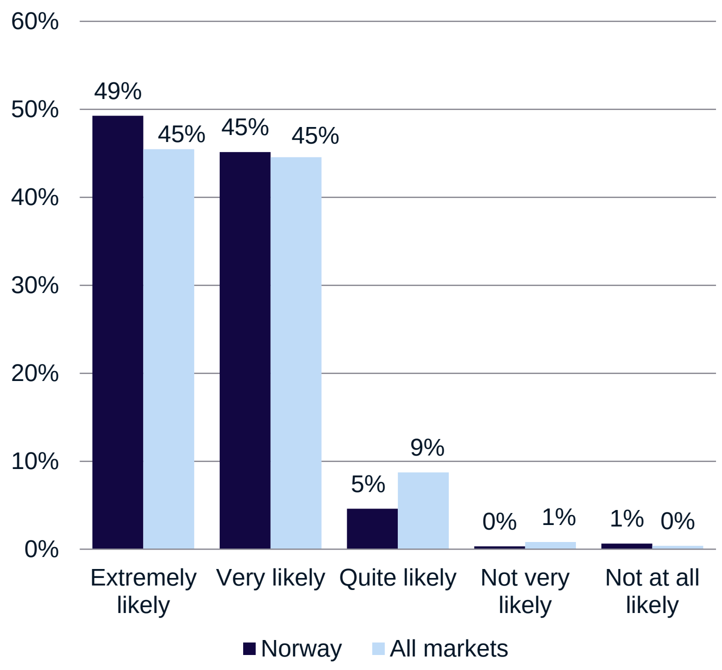
Source: International Passenger Survey by ONS, CIA World Factbook 2017

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016; asked to leisure visitors

1.3 Britain and competitors

Market size, share and growth potential

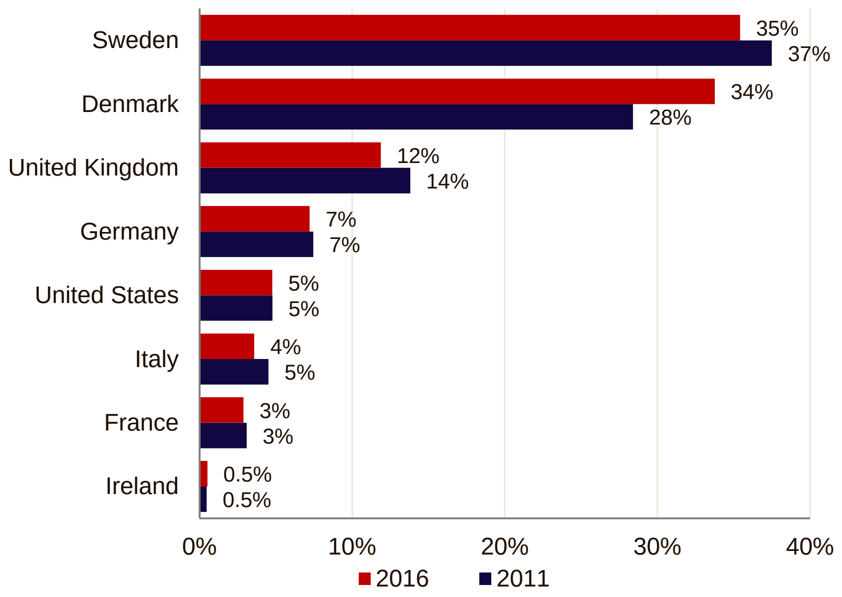
- Britain was the 4th most visited destination by Norwegian travellers in 2016, behind Sweden, Denmark and Spain.
- Forecasts suggest there is the potential for more than 46% growth in the number of Norwegian outbound overnight trips in the 2016-2025 period. The number of visits to Britain is also forecasted to grow by 39% by the same year.
- Of those who came to Britain for a holiday, more than half said that they only considered Britain, no alternative destination.*
- In total, Norwegians took 21.9 million domestic and international trips in 2016. More than 63% of these were domestic (+1% on 2015). Trips going abroad decreased by 8% year-on-year.

Britain ranks 4th
for Norwegian outbound destinations by volume

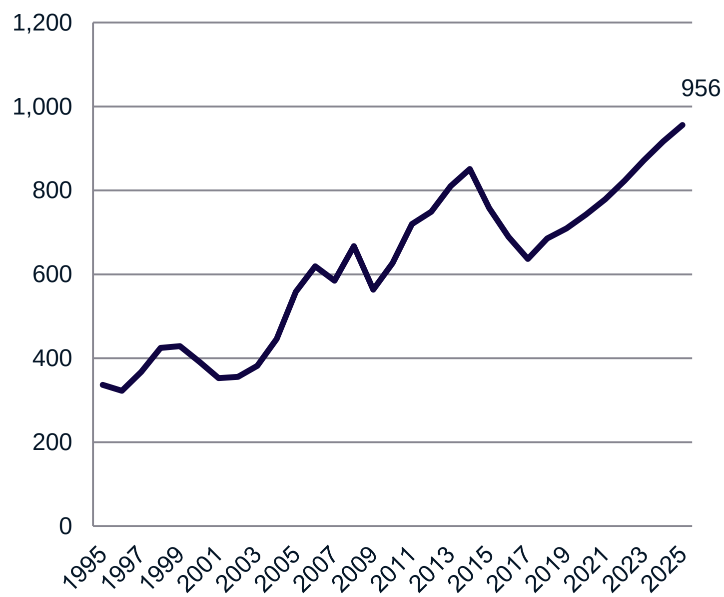
Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Statistik sentralbyrå Statistics Norway
**indicates low base*

1.3 Britain and competitors

Britain's market share of Norwegian visits among competitor set



Historic and potential visits from Norway to Britain (000s)



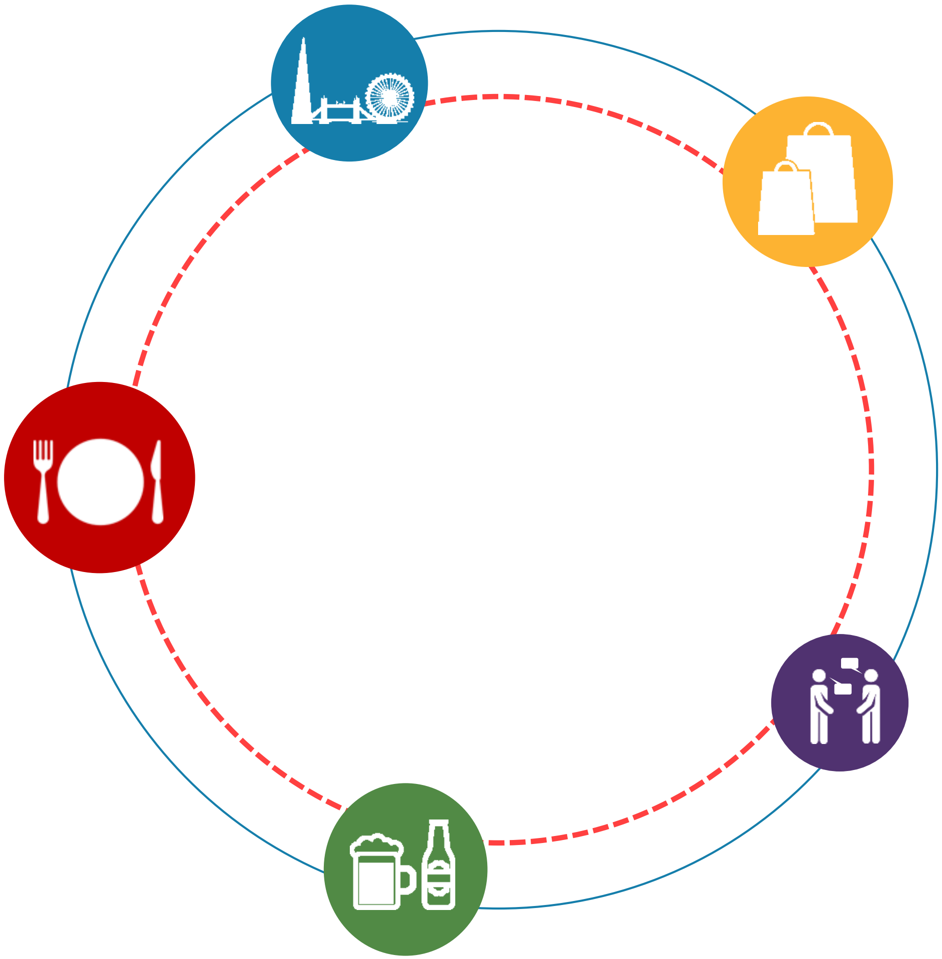
Source: Oxford Economics, outbound overnight visits

1.4 Inbound activities

Inbound Britain activities

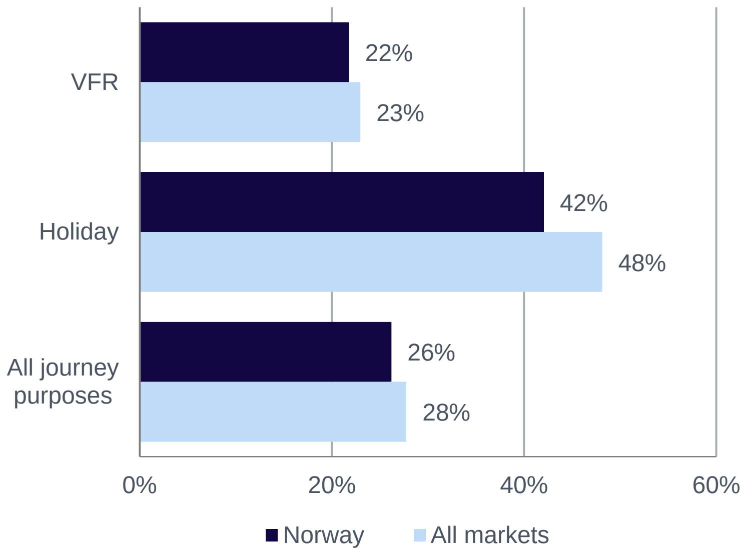
- Three in four Norwegian visits involve dining in a restaurant and more than half going to a pub. Almost a third like to socialise with locals while here.
- Shopping is the second-most popular activity for Norwegian visitors in the UK.
- Sightseeing plays a key role, too, with almost two in five visits featuring this activity.
- Nearly half of holiday visits involve time in a park or garden.
- About 85,000 visits per annum feature time watching football.
- Almost a quarter of Norwegian holiday visits went to the theatre, opera, musical or ballet while in Britain in 2016 (above average propensity).

Source: International Passenger Survey by ONS

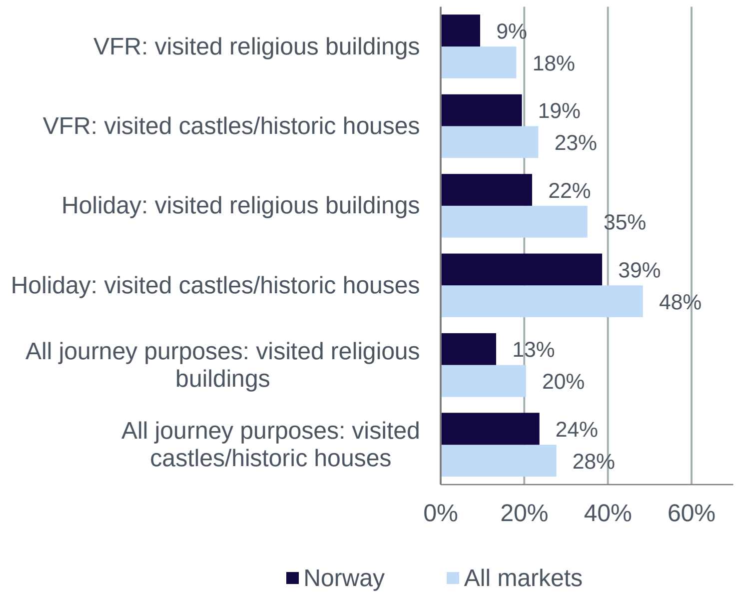


1.4 Inbound activities

Propensity to visit museums and galleries



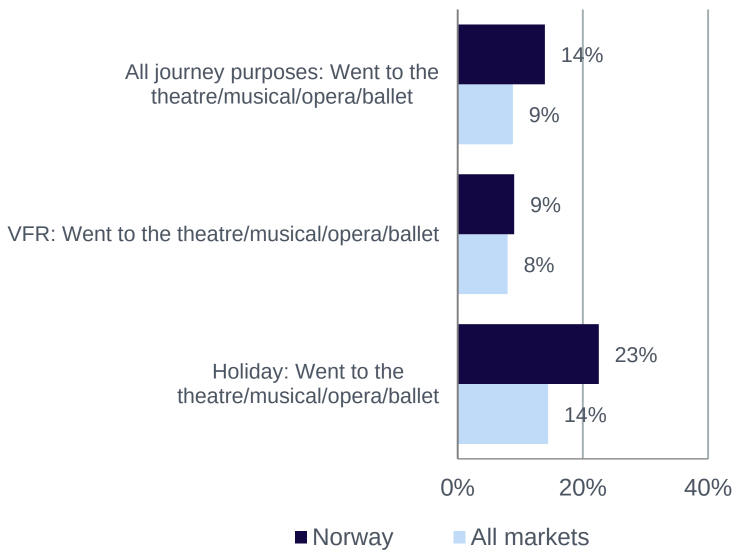
Propensity to visit built heritage sites



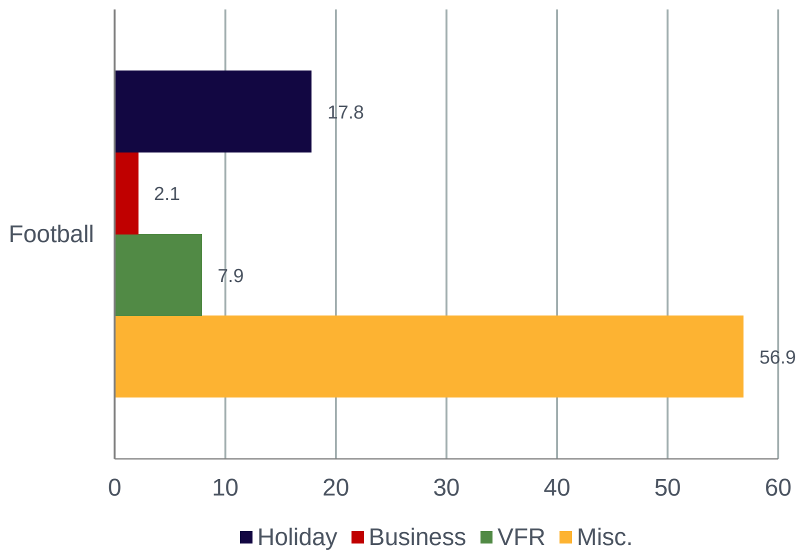
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to attend the performing arts



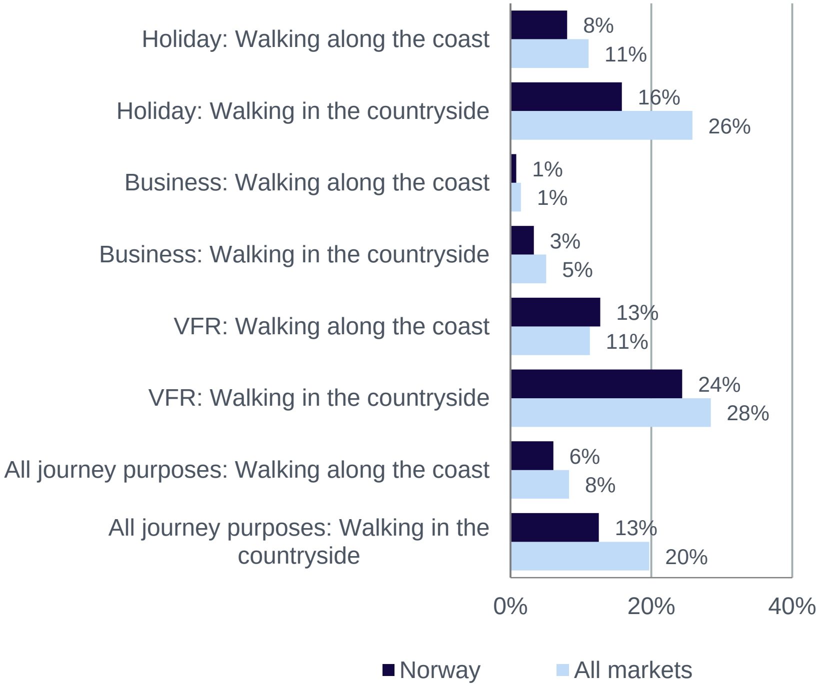
Number who went to watch football live during trip (000s)



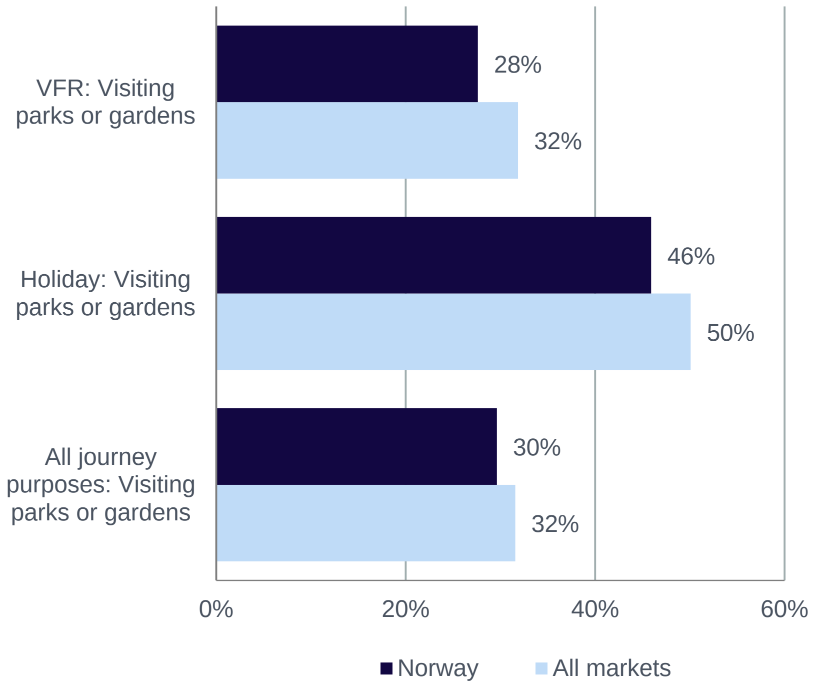
Source: International Passenger Survey by ONS 2011 and 2016

1.4 Inbound activities

Propensity to go for a walk



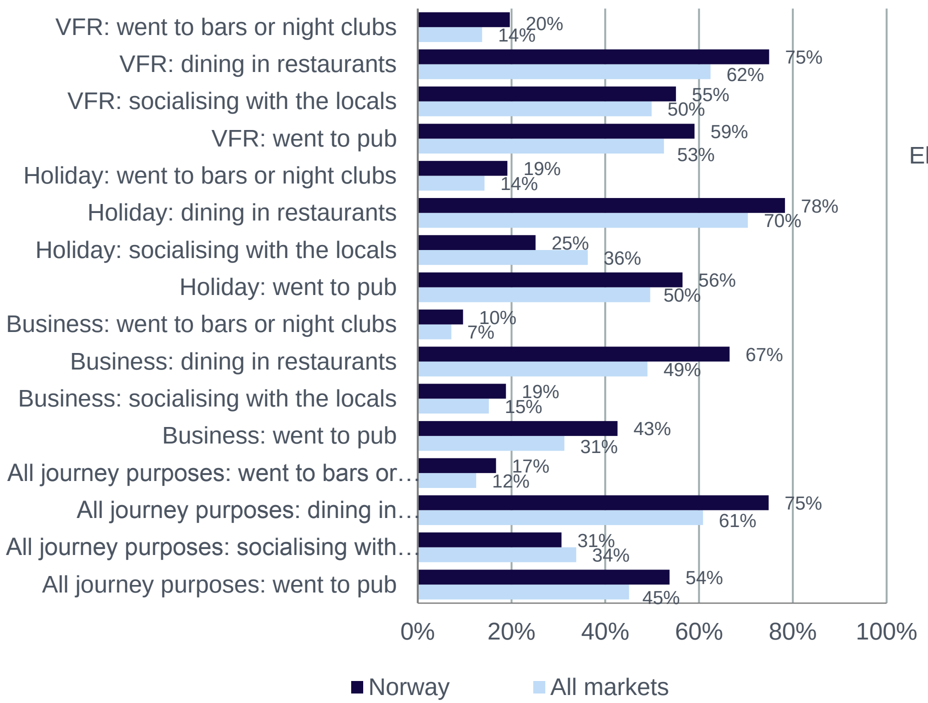
Propensity to visit a park or garden



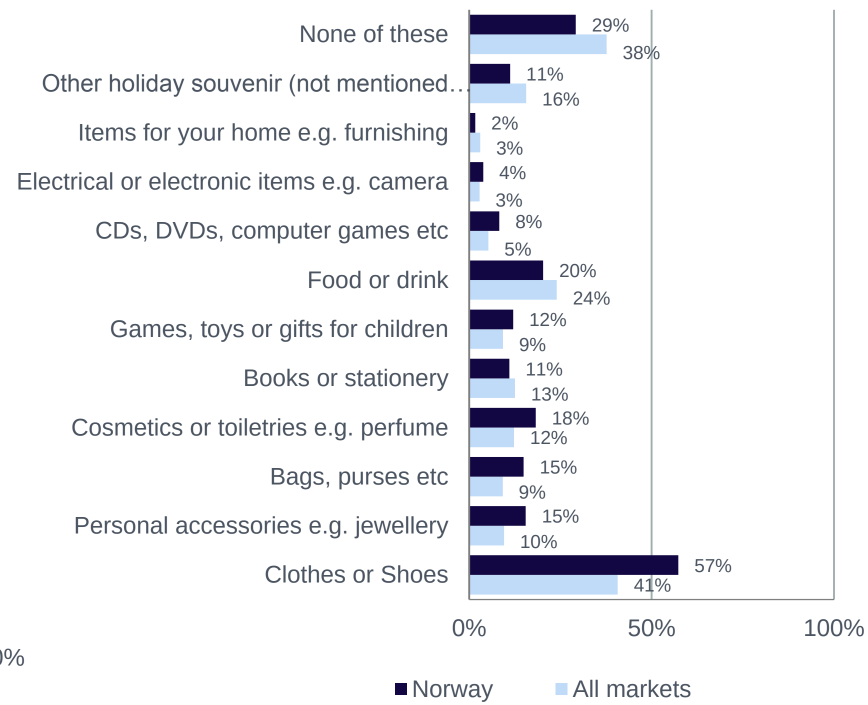
Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals



Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

Chapter 2:

Understanding the market

2.Understanding the market

Chapter summary

- Norway has a population of about 5 million.
- The volume of Norwegian domestic saw increases in the January – September 2017 period compared to the same time in 2016. 63% of Norwegian trips taken in 2016 were trips within Norway.
- 41% of Norwegian holiday visitors tend to start thinking about their trip to Britain as early as half a year or more in advance.
- 45% of bookings were made in the three to six month window before the arrival to Britain and two in five of Norwegian bookings happened within two months before the trip.
- Friends, family and colleagues are by far the most important influence on the holiday destination choice followed by price comparison websites and accommodation provider websites.

2.5%
Forecasted growth rate of the Norwegian economy in 2018.

Source: Oxford Economcis, VisitBritain/IPSOS 2016, Statistics Norway SBB 2017

2.1 Structural drivers

Demographics & society

- Population of about 5 million.
- Norway has a parliamentary constitutional monarchy.
- There are 18 counties (fylker): Akershus, Aust-Agder, Buskerud, Finnmark, Hedmark, Hordaland, Møre og Romsdal, Nordland, Oppland, Oslo, Østfold, Rogaland, Sogn og Fjordane, Telemark, Troms, Trøndelag, Vest-Agder and Vestfold. (Nord-Trøndelag and Sør-Trøndelag merged to Trøndelag as of 1 January 2018.)
- The highest populated areas are in the South and along the coast in the southeast; areas inland of the north tend to be scarcely populated.
- The 3 official languages are Bokmål Norwegian, Nynorsk Norwegian and Sami (the latter is an official language in 9 counties). There are also small Finnish-speaking minorities. Norwegian people often have a good command of English and expect and usually enjoy speaking English when in Britain.
- Norwegian employees are usually entitled to 25 days of annual leave and there are 13 public holidays per year in Norway.

5.3m Norwegian population

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2017 estimate
Total population	5,291,000
Median age	39
Average annual rate of population change in 2017 - 2022	0.9%

Economic indicators

Indicator	2017	2018	2019
Real GDP	2.3%	2.5%	2.1%
Consumer spending	2.5%	2.6%	2.1%
Unemployment rate	4.2%	3.9%	3.7%
Wage index	4.2%	3.5%	3.5%
Consumer prices	1.8%	1.9%	2.4%

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: general market overview

General market conditions

- Norway was Britain's 16th largest source market in terms of visits and 15th most valuable for visitor spending in 2016.
- The Norwegian economy had experienced a downturn since 2014 but has shown signs of recovery in 2017. 2018 GDP growth is expected to outperform 2017 at a rate of 2.5%. Consumer sentiment also continues to rebound.

Key demographic and economic data

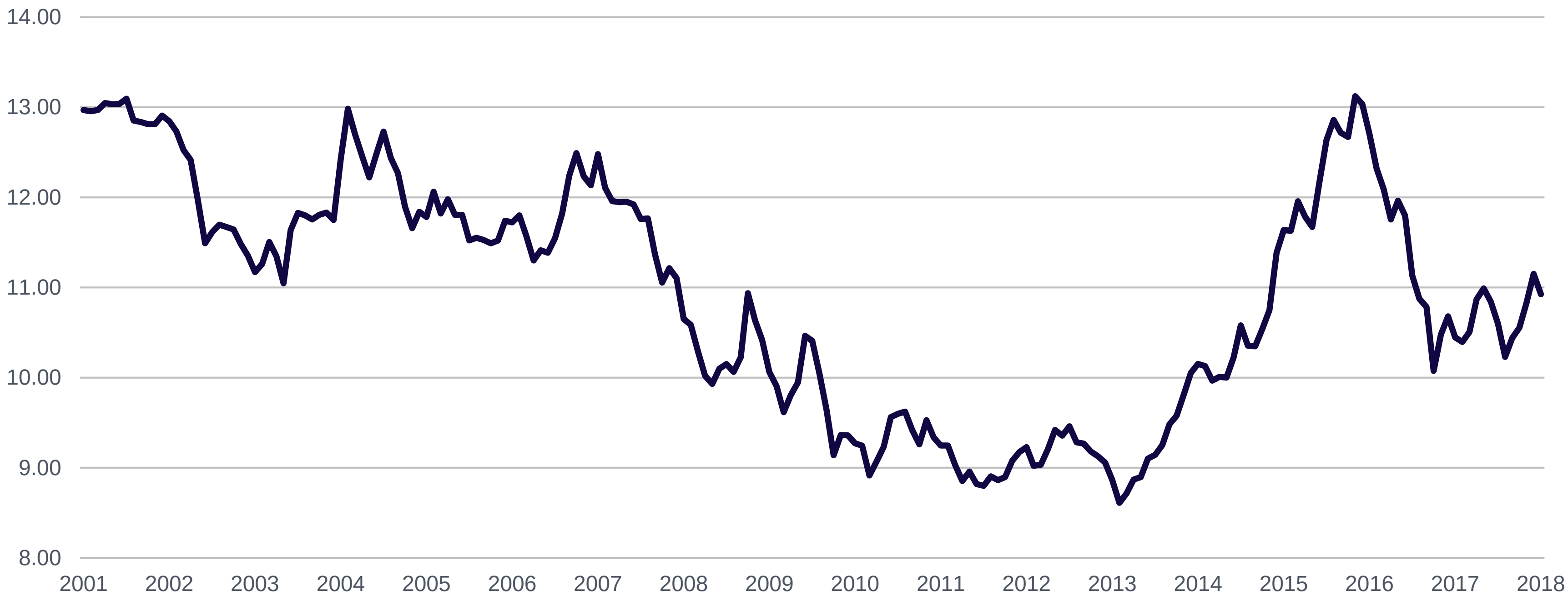
Measure (2017 data)	Norway	Eurozone
Population (m)	5.3	337.7
GDP per capita PPP (US$)	64,270	38,972
Annual average GDP growth over past decade (%)	1.1	0.6
Annual average GDP growth in 2017 (%)	2.3	2.4

Source: Bank of England, Oxford Economics, CIA World Factbook 2017

- The country has a population of about 5 million with a median age of 39.
- Most people in Norway are well-educated and enjoy a very high standard of living with real GDP per capita in purchasing power parity terms of more than US$64,000, forecasted to increase in the years to come.
- Exchange rate: comparing the monthly average for December 2015, when GBP was very strong vs. NOK, and December 2017, the cost of GBP has become 14% more affordable for Norwegian visitors to the UK.

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in NOK)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England

2.2 Consumer trends

- Active holidays have become a trend for Norwegians. Many like to go on such a holiday within Norway. Domestic airline searches show that many are looking for areas where nature and active experiences are easily accessible. Holiday statistics by FINN travel for 2017 also show that often outdoors activities in mountains are combined with activities which are sea-bound like swimming, boating, etc.
- The majority of Norwegians book their holidays online and are familiar with e-commerce, especially younger age groups.
- The sharing economy is also a growing trend in Norway and Norwegians are familiar with companies like AirBnB and Uber.
- The volume of Norwegian domestic travel saw increases in the January – September 2017 period compared to the same time in 2016.

58%

of Norwegians plan to take at least one weekend trip out of the country for 2018

Sources: Statistics Norway SBB 2017, Travel News January 2018, Virke Reises befolknings-undersøkelse, Innovasjon Norge, FINN travel

2.2 Consumer trends: overall travel trends

Travel trends

- About 63% of all Norwegian trips taken in 2016 were to domestic destinations (about 14 million). The volume of Norwegian trips saw growth in January – September 2017, up 2% on the same period in 2016.*
- Short domestic holiday trips had seen a slight decline when comparing January – September 2017 with the same time in 2016, accounting for just over 6 million trips. Long holiday trips have seen growth in the first nine months of 2017 compared to 2016.*
- Whilst Norwegian domestic trips outnumber outbound trips by volume, the picture for travel spend is almost inversed with only a third of Norwegian travel spend made for domestic trips (almost 53bn NOK) in 2016. In the January – September 2017 Norwegians have spent 9% more on trips than at the same time in 2016.*
- Active holidays have become a trend among Norwegians with many undertaking these activities in their homecountry. Holiday statistics by FINN travel for 2017 also show that often outdoors activities in mountains are combined with activities which are sea-bound like swimming, boating, etc.
- For weekend trips, countries with hip urban cities are relevant. 58% of Norwegians plan for at least one weekend trip out of the country in 2018. Denmark (Copenhagen), Sweden (Stockholm), United Kingdom (London) and Spain (Barcelona) are at the top of the list.
- The sharing economy is also a growing trend in Norway and Norwegians are familiar with companies like AirBnB and Uber.
- The majority of Norwegians book their holidays online and are familiar with e-commerce, especially the younger age groups.

* Trips stated include at least one overnight, short trips defined as one to three nights away from home, long trips as lasting four nights or more.

Source: Statistics Norway SBB 2017, Travel News January 2018, Virke Reises befolknings-undersøkelse, Innovasjon Norge, FINN travel

2.2 Consumer trends: motivation and attitudes to holidays

Motivation and attitudes to holidays

- Norwegians take an average of five flights a year and the average travel time is 3 hours and 53 minutes.
- 87% of Norwegians claim to be in control of both the schedule and the packing for their trip.
- 25% of Norwegians tend to avoid trying local cuisine on holiday, and prefer to eat at restaurants with food they know.
- Main motivations for travel include spending time with family and/or friends, recreation and sunbathing, experiencing new places, and food and drink. Active activities including skiing, hiking and kayaking are also important motivators for many Norwegians.
- Other interests that motivate Norwegians to travel include: music/concerts/festivals, art and culture, wellness, health and exercise and sporting events.
- Political stability and safety/security are also important factors for many Norwegians when choosing a travel destination.
- Recommendations from friends and family are the biggest source of inspiration when choosing a travel destinations.

Source: Onepoll.com for British Airways, SSB, Virke

2.3 Booking and planning

- A large proportion of Norwegian holiday visitors tend to start thinking about their trip early with 41% doing this as early as half a year or more in advance.
- 45% of bookings were made in the three to six month window before the arrival to Britain and two in five of Norwegian bookings happened within two months of the trip.
- Most bookings to Britain were made online. Hardly any Norwegian visitors book face to face which compares to a global average of 26% who book a holiday, i.e. transport and accommodation combined, in this way.

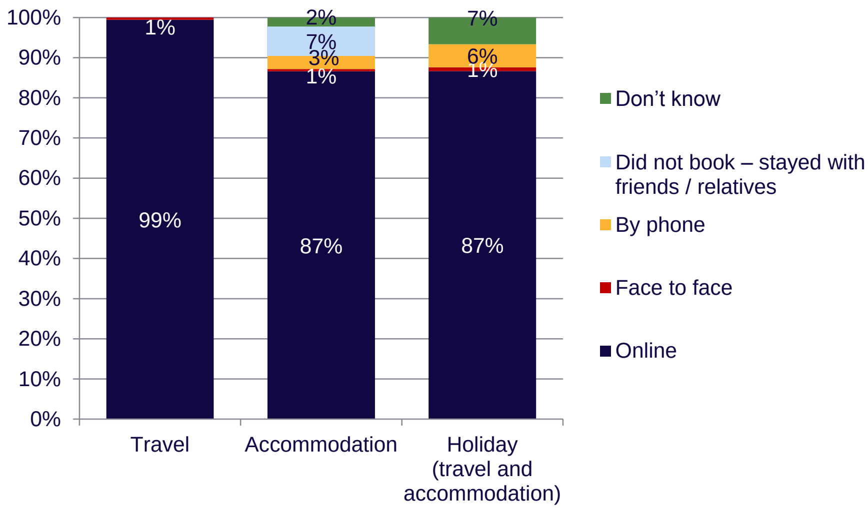
45%

of Norwegian visitors booked between three and six months of their arrival in Britain

Source: VisitBritain/IPSOS 2016

2.3 Booking and planning: booking channels and ticket sales

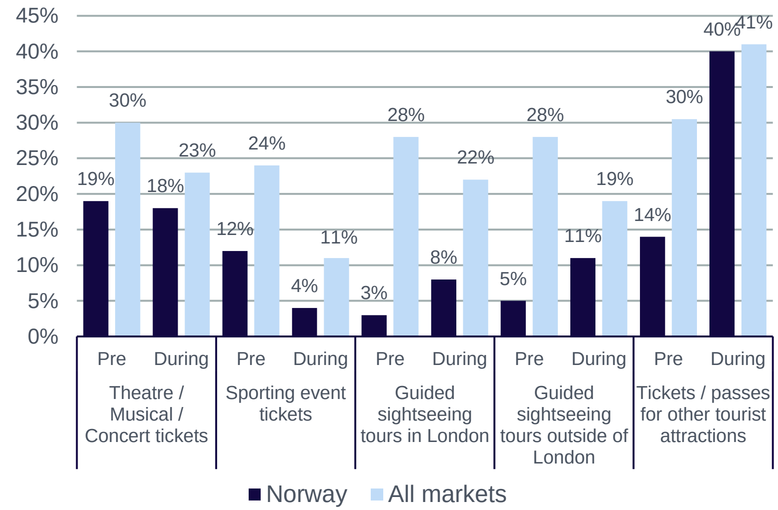
How trips to Britain were booked



- Norwegian visitors tend to be very comfortable with booking their trips to Britain online. Almost all Norwegians booked their travel on the Internet (i.e. transport to Britain).
- Hardly any Norwegian visitors book face to face which compares to a global average of 26% who book a holiday, i.e. transport and accommodation combined, in this way.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

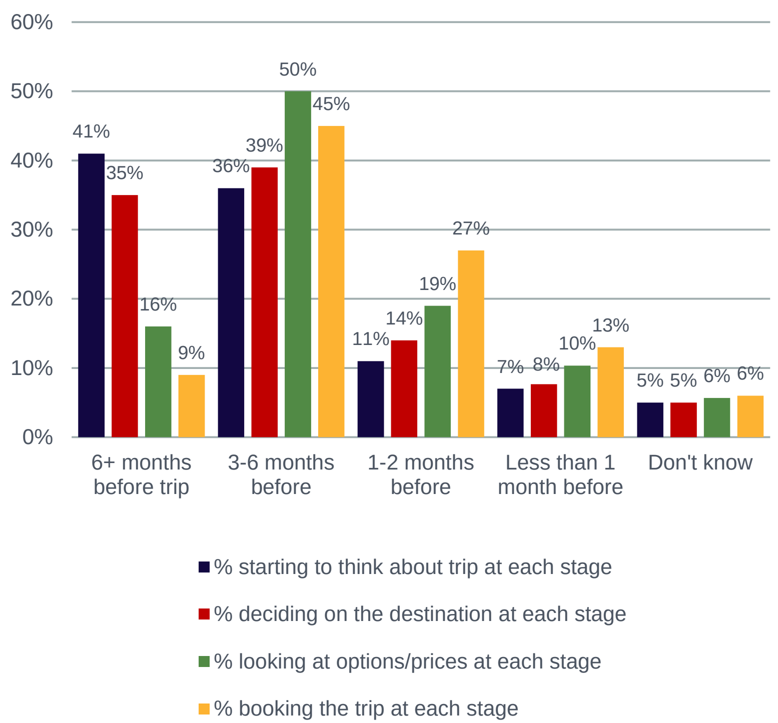
Propensity to make a purchase before or during trip



- Prior to trip: The proportion of purchases of the above items before the trip was below the all market average across all categories amongst Norwegian respondents with theatre/musical or concert tickets the most likely to be bought in advance of the trip to Britain.
- During the trip: Nearly one in five Norwegians bought theatre, musical or concert tickets during their trip – a similar proportion as those who booked these in advance. Almost two in five purchased tickets/passes for miscellaneous tourist attractions whilst in Britain.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- Around two in five Norwegian visitors start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; more than one in three did this three to six months in advance.
- 73% made their decision to travel to Britain at least three months prior to the actual journey (just below half of these six months or earlier).
- Half of Norwegian visitors looked at options and prices between three and six months ahead of the trip which compares to a global average of 37%. Roughly one in five checked options and prices between one and two months ahead of their trip.
- 45% booked their trip in the three to six months leading up to their trip and two in five booked within two months of arrival. Compared to other markets, Norwegians tend to neither have a strong tendency to be especially early nor late in their planning and booking behaviour.
- Most of the Norwegian visitors who booked travel separately booked their transport directly with the service provider (74%). 46% of those who booked accommodation separately purchased it directly from the accommodation provider and the same share from a travel agent/tour operator or travel comparison website. The share of the latter rises to more than half among those who bought travel and accommodation together.

2.4 Reaching the consumer

- The most influential information source for Norwegian visitors when making a holiday destination choice is, by far, friends, family and colleagues followed by price comparison websites and accommodation provider/hotel websites. Travel review websites and information from search engines also feature among some of the most important influences on where to go for a holiday.
- Whilst travel providers and online sources are popular for researching and making a destination choice, one in five Norwegians state that they consult travel guidebooks.
- Cultural attractions are the most important motivation for choosing Britain as a holiday destination. Norwegians are more likely than the average to cite the ease of getting to and around in Britain, vibrant cities and the ease of planning as motivations to choose Britain.
- 67% of Norwegians watched TV for 1.5 hours on an average day in 2016 (below the European average). 59% listened to the radio daily and 79% weekly in 2016.

Source: VisitBritain/IPSOS 2016, SBB

Friends, family & colleagues

#1 Influence for the destination choice of the Norwegians

2.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Public service television NRK broadcasts through 3 main channels: NRK1, NRK2, NRK3/NRKSuper
- Main commercial channels include TV2, TV3, TV Norge, Zebra, MAX, FEM, VOX
- 67% watched television on an average day in 2016 (average of 1.5 hours, below European average).
- Many viewers also have access to most Swedish and Danish channels as well as foreign news channels like the BBC
- Travel programmes include KulTour (TV2) and Walkabout (NRK)

Radio

- 59% listened to the radio on an average day, 11% online. 79% listened to the radio on a weekly basis.
- One quarter listens to DABradio
- Norwegians tend to have a preference for listening to news, entertainment and popular music.
- NRK P1 is the dominant player, P4 is the second largest.

Source: SBB

Newspapers

- On an average day, 39% of the population read newspapers issued on paper, 66% on a weekly basis.
- In total 73% read newspapers online.
- There are 227 printed newspapers in Norway
- National papers: VG, Aftenposten, Dagbladet, Dagsavisen.
- Dailies published in the four metropolitan areas of Oslo, Bergen, Trondheim and Stavanger: Aftenposten, Bergens Tidenede, Adresseavisen, Stavangers Aftenblad. All published daily with focus on entertainment, sports, culture and opinion pieces. Aftenposten, Adresseavisen and Stavangers Aftenblad all have travel sections.
- Local dailies: 52, local weekly papers: 71

2.4 Reaching the consumer: magazines and online media

Magazines

- Hjemmet is the biggest magazine, with Se og Hør as number 2, and Familien in third place.
- There has been a declining trend for women's magazines in the last couple of years, while more niche magazines, such as food, interior and gardening magazines, have experienced a increase in the last couple of years.
- 5% of Norwegians read weekly printed magazines on an average day, 7% printed plus online.
- Women and seniors are the main audience.
- On average the Norwegian population spent 2 minutes on reading weekly magazines per day, in 2016.
- Norwegian consumer travel magazines include Magasinet Reiselyst, Vagabond, REIS and Travel News.

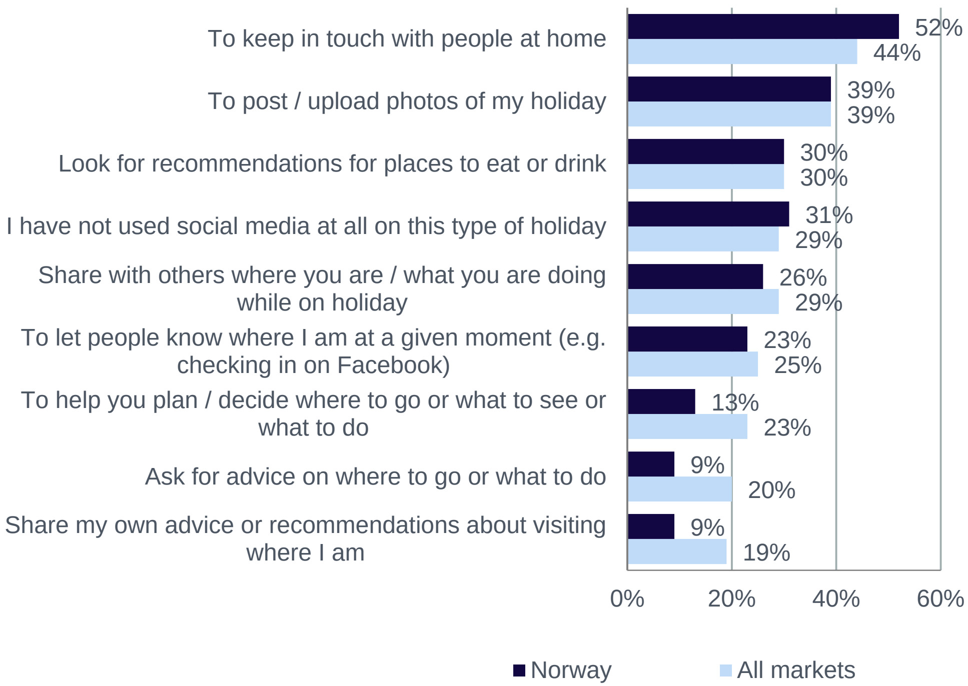
Online media

- The Internet is seen as the most important information source for Norwegians, ahead of TV, daily newspapers and radio.
- 89% use the internet daily, and 95% use it weekly.
- 7 in 10 Internet users in Norway use Facebook daily.
- 27% state Facebook as their main media to stay updated on news, however Facebook is not viewed as a highly trusted source for news. Traditional media is still viewed as the most trustworthy channel for news.
- 6 in 10 follow traditional media on Facebook.
- 1 in 3 Norwegians use Instagram daily; a further 33% use Instagram weekly or more frequently.
- Over 50 of adult Norwegians have a profile on Snapchat; 70% of these use it daily.
- 1 in 4 has a profile on Twitter, but only 1 in 4 of Norwegians on Twitter check it daily.
- 42% of Norwegians have a YouTube profile; 91% are users. Of those who have a profile, 80% use it weekly.

Source: IPSOS/VisitBritain, SBB

2.4 Reaching the consumer: social media on holiday

Use of social media on holiday

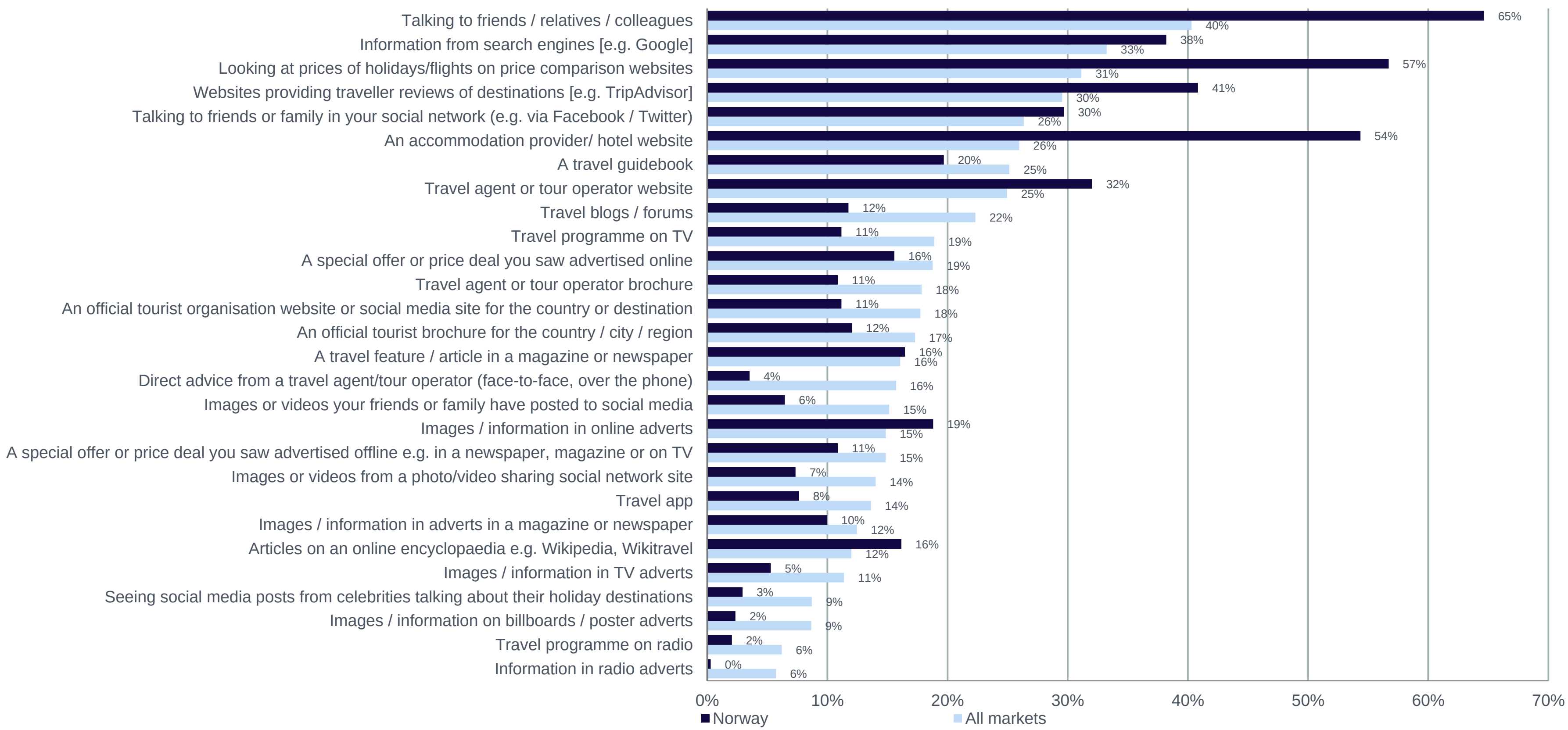


- The social media channels most used in the Norwegian market are Facebook, YouTube, Snapchat, Instagram, Google + and Twitter.
- More than half of Nowegians like to keep in touch with people at home and about two in five like to post/upload their holiday photos. Almost a third look for recommendations where to eat or drink. 61% like to stay connected whilst they are on holiday and 69% regard a smartphone as essential whilst they are on holiday, slightly below the all market average.
- 57% of Norwegian travellers love to take photos when they are on holiday which is a lower proportion than in many other markets. 63% of Norwegian travellers have shared holiday photos online or would like to do so and 36% have shared holiday video content or would like to do so (below average). Half of Norwegians have already used location technoloy to find places to visit. Fewer than average use social media to meet up with locals or fellow travellers.
- Only 15% enjoy writing reviews on social media of places they have been to on holiday and 41% place trust in reviews on social media (below average).

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

2.4 Reaching the consumer: influences

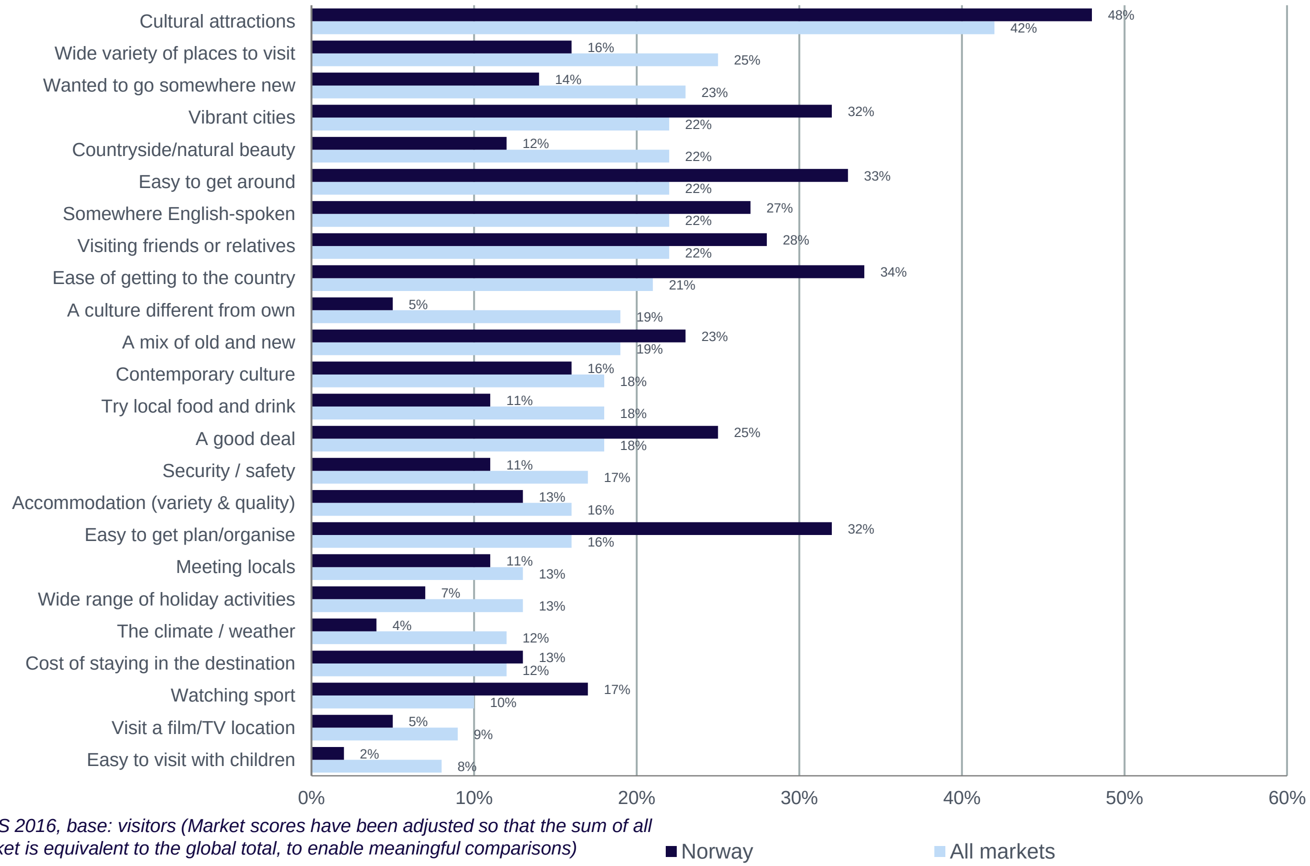
Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, *to enable meaningful comparisons)*

2.4 Perceptions of Britain: motivations

Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

Chapter 3:

Access and travel trade

3. Access and travel trade

- 99% of Norwegian visits were made by plane. The bulk of seat capacity comes in on the Oslo – London corridor although Scotland and other parts of England also enjoy direct access.
- Norwegian and Norwegian Air International combined account for about a third of annual seat capacity between Norway and Britain in 2017, followed by SAS, British Airways and Ryanair.
- The travel industry in Norway is made up of Tour operators (OTAs/Charter/Specialist), Carriers, MICE & Travel Agents.
- Britain product can mainly be found:
  1. Charter City Breaks by major charter tour operators (London dominates, Edinburgh, Manchester)
  2. Niche programmes by specialist operators (Gardens, Food & Drink, Sports)
  3. Coach touring by coach operators / medium sized tour operators

99%

of visits to Britain from Norway came by plane in 2016

Source: Apex Rdc 2017, International Passenger Survey by ONS

3.1 Access: key facts

- 99% of Norwegian visits to the UK were made by plane. It is a short non-stop flight: roughly about 2-4 hrs flight time, depending on the destination and origin airports.
- Annual seat capacity has seen declines since record capacity levels offered in 2013 – likely as a result of changes in demand on the back of the economic struggles.
- The bulk of airline seat capacity is from Oslo to London although numerous airports in Scotland and other parts of England enjoy direct access from Norway.
- Norwegian and Norwegian Air International combined account for about a third of annual seat capacity between Norway and Britain in 2017, followed by SAS, British Airways and Ryanair.
- Norwegian visitors departing Britain by air pay £13 in Air Passenger Duty.

Source: International Passenger Survey by ONS, Apex RdC 2017, non-stop flights only

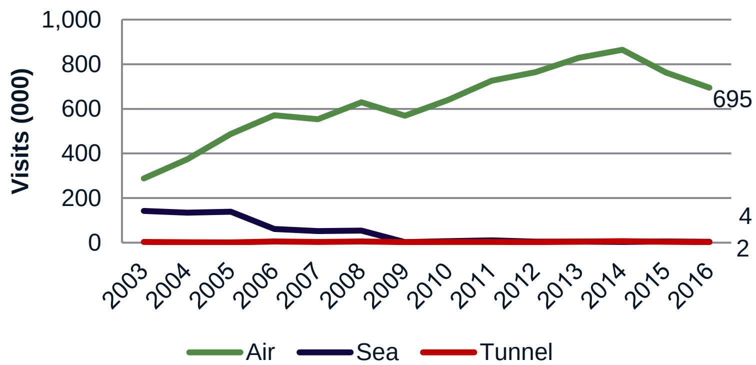
Almost all Norwegian visitors travel to the UK by plane.

Access to Britain

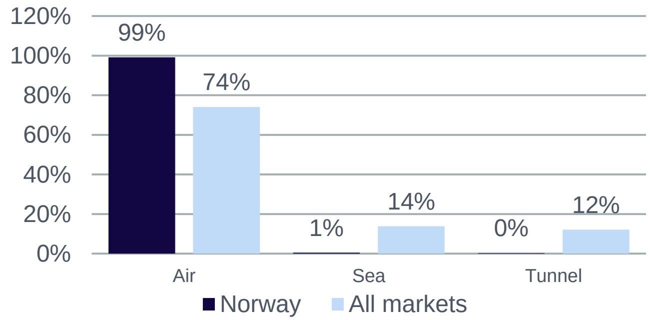
Measure	2017
Weekly aircraft departures	224
Weekly aircraft seat capacity	32,963
Airports with direct routes in Norway	8
Airports with direct routes in Britain	14

3.1 Access: mode of transport

Visits by mode of transport

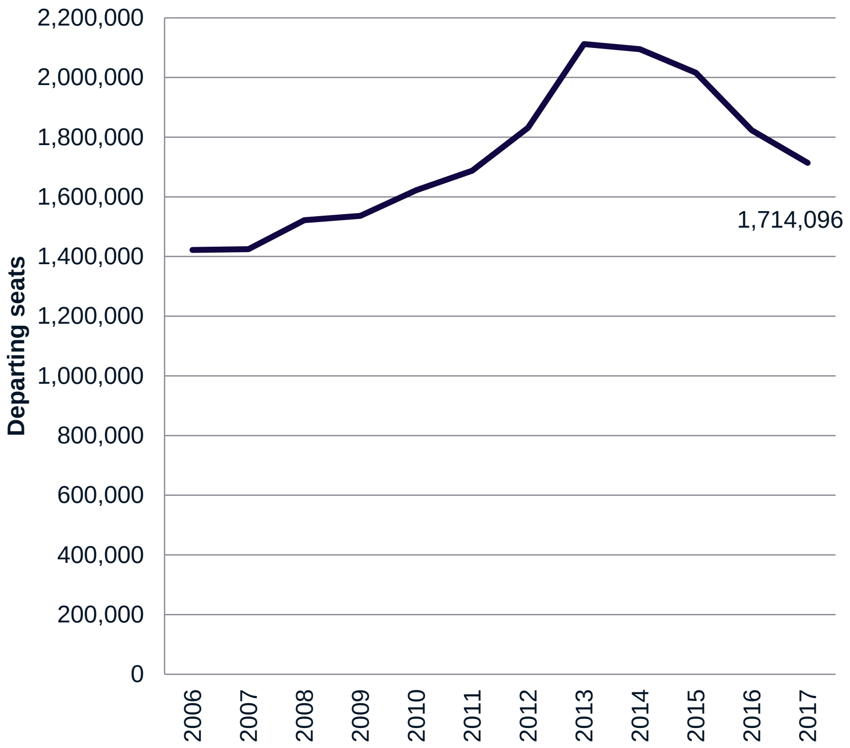


Annual share by mode (2016)



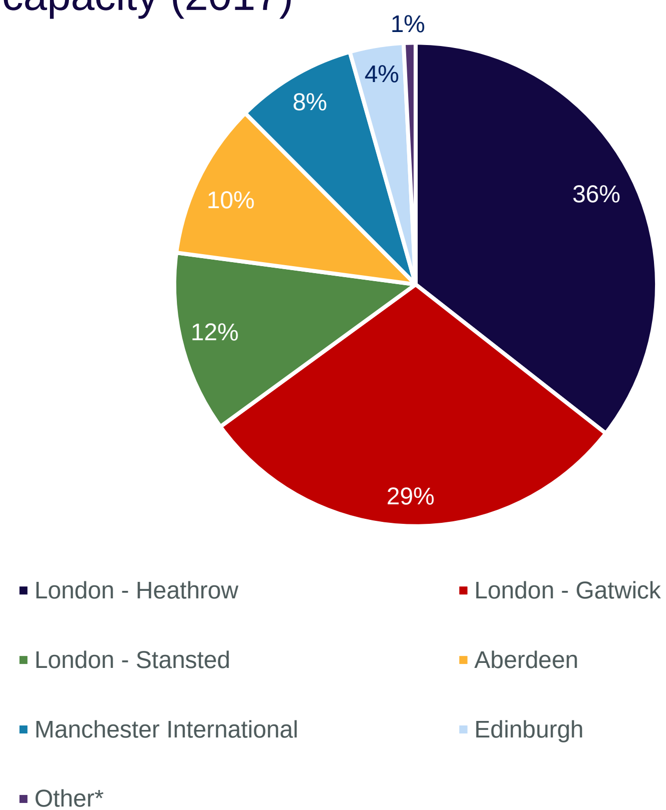
Source: International Passenger Survey by ONS, Apex Rdc, non-stop flights only

Origin airport annual seat capacity



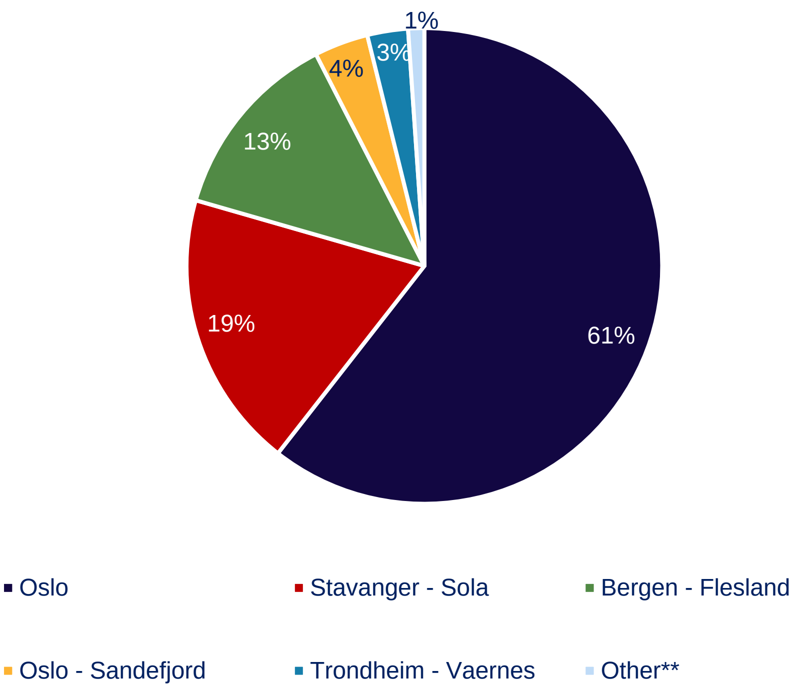
3.1 Access: capacity

Destination airport annual seat capacity (2017)



Source: Apex Rdc 2017: non-stop flights only

Origin airport annual seat capacity (2017)

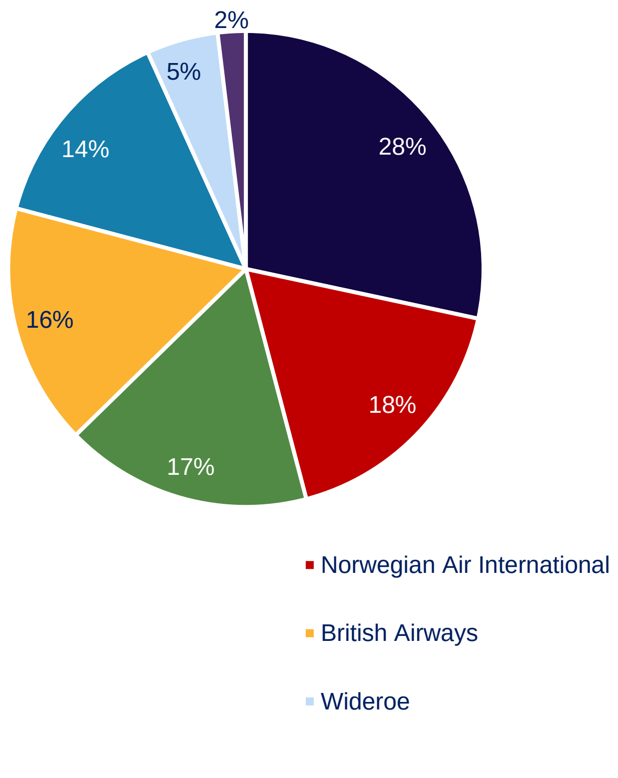


*Destination airports with less than 2% annual seat share grouped in other: Newcastle, Glasgow International, Shetland Islands – Sumburgh, Kirkwall, Bristol, Bournemouth International, Birmingham International and East Midlands

**Origin airports will less than 2% annual seat share grouped in other: Tromsø, Haugesund and Fagernes – Valdres

3.1 Access: capacity

Airline seat capacity by carrier (2017)



Source: Apex Rdc 2017: non-stop flights only

3.2 Travel trade: general overview

- The key centres for the travel trade are Oslo, Stavanger, Bergen and Trondheim. There is an hour's flight to other Nordic markets' major hubs in Sweden or Denmark from Oslo, too.
- The planning cycle varies, so it is possible to do business in Norway throughout the year.
- The Norwegian travel trade can be roughly split into these broad categories: charter operators, business travel and MICE operators, online operators and retail travel agents.
- Some operators are pan-Nordic as well, so it is possible to reach the whole region via a single contact.
- Norwegian visitors who booked their travel to Britain separately to accommodation were most likely to book directly with the airline/train/ferry operator (74%). 28% chose to book through a travel agent/tour operator/travel comparison websites. An equal share booked directly with the provider or through a travel agent/tour operator/travel comparison website when they booked accommodation stand-alone (46% each). More than half chose the latter option when they booked a holiday (travel and accommodation combined).

Source: VisitBritain/IPSOS 2016, base: visitors

Norwegians value building business relationships

3.2 Travel trade: Norwegian tour operators

Top ten operators in Norway in 2015/2016

Top Ten Tour Operators	Turnover NOK (000s)
Ving Norge AS	2,979,166
TUI Norge AS	2,035,401
Der Touristik Nordic AB (Apollo NO/SE/DK)	5,362,221
Travel Invest AS	609,280
Reisegiganten AS	558,900
Boreal Travel AS	558,900
Aircontact Group AS (Berg-Hansen Reisebureau)	1,321,171
Escape Travel AS	403,738
Kilroy Norway AS	304,851
Egencia Norway AS	280,262

Source: Largest companies.net

Top intermediaries in the Nordic region

Top intermediaries in the Nordic region
Escape Travel
Albatros Travel
Temareiser AS (NO)
eTraveli
RK Travel (mainly SE/NO)
TEMA Resor (Jambo Tours Scandinavia AB)
Apollo Travel Group
KulturRejser (SE/DK)

3.2 Travel trade: Norwegian holidays

Public holidays

National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
25 March	Palm Sunday
29 March	Maundy Thursday
30 March	Good Friday
1 April	Easter Sunday
2 April	Easter Monday
1 May	Labour Day
10 May	Ascension Day
17 May	National Day
20 May	Whit Sunday
21 May	Whit Monday
25 December	Christmas Day
26 December	Second Day of Christmas

Date	Local/School Holiday	Area
Week 7	Vinterferie	Stavanager
Week 8	Vinterferie	Oslo, Trondheim, Ålesund
Week 9	Vinterferie	Bergen
Week 40	Høstferie	Oslo, Kristiansand
Week 41	Høstferie	Trondheim, Stavanger, Bergen, Ålesund

Please note that some Norwegian businesses close for half a day before public holidays.

3.2 Travel trade: practical information

General practical information:

- Business hours are usually 08:00 – 16:00 with lunch taken between 11:30 and 13:00.
- When introduced expect to shake hands. Use first names rather than last names.
- Keep meetings short and have an agenda.
- Follow up quickly on any action points.
- Mid June to mid August can be difficult to arrange meetings/events etc due to summer school holidays and long vactions.
- Norwegians generally speak good English – so language is not an issue.

Sales calls

The Norwegian trade structure is consolidated and closely connected. The big players are carriers and tour operators; 4 major charter tour operators dominate mainstream leisure travel, while the mid size and niche operators are more relevant for Britain.

- Norwegians are not used to hierarchy and tend to be quite informal, but this does not mean unprofessional.
- Feedback in a business context tends to be direct.
- Norwegians are not used to 'the hard-sell', so a gentle, friendly approach will usually work better.
- Norwegians are generally perceived as being fairly quiet, they tend to listen and observe before commenting.
- Norwegians are generally in touch with British current affairs, humour and culture, so don't be afraid to bring it into a discussion.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Norwegian trade attend VisitBritain's ExploreGB conference & VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market and ITB.

3.3 Caring for the consumer

Caring for the consumer

- Norwegians tend to be familiar with British culture; Norwegians are in particular familiar with Premier League football and British TV programmes.
- Cleanliness is very important. Budget accommodation can be fine, but they are likely to expect them to be spacious, en-suite rooms.
- Value for money is a key priority for Norwegians and most appreciate offers of discounts.
- Whilst many Norwegians have good command of English, signage and information in their native language could make them feel more welcome. For two in five this fell below expectations in 2016.

Source. International Passenger Survey by ONS 2016

Language basics

English	Norwegian
Please	Vær så snill
Thank you	Takk
Yes	Ja
No	Nei
Sorry! (apology)	Unnskyld
Excuse me!	Unnskyld meg
Sorry, I do not speak Norwegian.	Jeg snakker ikke norsk

3.3 Caring for the Consumer

Caring for the Consumer:

- Norwegian perceptions of and satisfaction with British food tend to be lower than average, although roughly half of Norwegians stated that they are very satisfied with the food and drink offered in Britain.
- At home, Norwegians are often used to a cold lunch at around 11:30 and dinner at around 5:30pm but they are happy to adapt this when travelling.
- Breakfast in Norway tends to be continental breakfast, often with brown bread with cheese, ham and jam. Milk, fresh juice and black coffee often feature in preferred drinks. Norwegians travelling in the UK will often happily eat an English breakfast but perhaps not every day.
- Norwegians tend to like strong coffee and not being able to get decent coffee is often a source of complaint.
- Norwegians are comfortable with and used to paying with a credit card while in Britain.

Source. International Passenger Survey by ONS, 2015

3.3 Caring for the consumer: Norwegian language tips

Language tips for arrival and departure

English	Norwegian
Hello	Hei
My name is…	Jeg heter
Welcome to Britain	Velkommen til UK
Pleased to meet you!	Hyggelig å hilse på deg!
How are you?	Hvordan har du det?
Enjoy your visit!	Hygg deg!
Goodbye	Ha det bra
Did you enjoy your visit?	Har du hatt det fint?
Have a safe journey home!	Ha en god reise hjem
Hope to see you again soon!	På gjennsyn!

3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specific-research
- 2018 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about Norway or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly (Email: research@visitbritain.org)

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain visitbritain.org/understanding-international-visitors
- Technology and social media visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

We are here to support you and look forward to working with you.

To find out more about the Norwegian or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

VisitBritain

Market and Trade Profile: Norway

February 2018

visitbritain.org
visitbritain.com
@VisitBritainBiz
@VisitBritain
VisitBritain
VisitBritain