

# BRITISH SKIERS

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NORWAYS MARKET POSITION AMONG BRITISH  
SKIERS

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INNOVATION NORWAY



Purpose and data

3

Method

4

**Theme 1:**  
Market share

5

**Theme 2:**  
Previous and futuristic visitor intention

11

**Theme 3:**  
What characterises the British skiers?

15

# PURPOSE AND DATA

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## Purpose

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

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

Analogous reports are made for the ski markets in Denmark, Germany and Sweden.

## Data

This report is based on **2.186** online interviews with British respondents aged 18 years or older, all living in London or South East England. **608** 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:

- **London:** 628 (217 skiers)
- **South East England:** 1.495 (391 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:

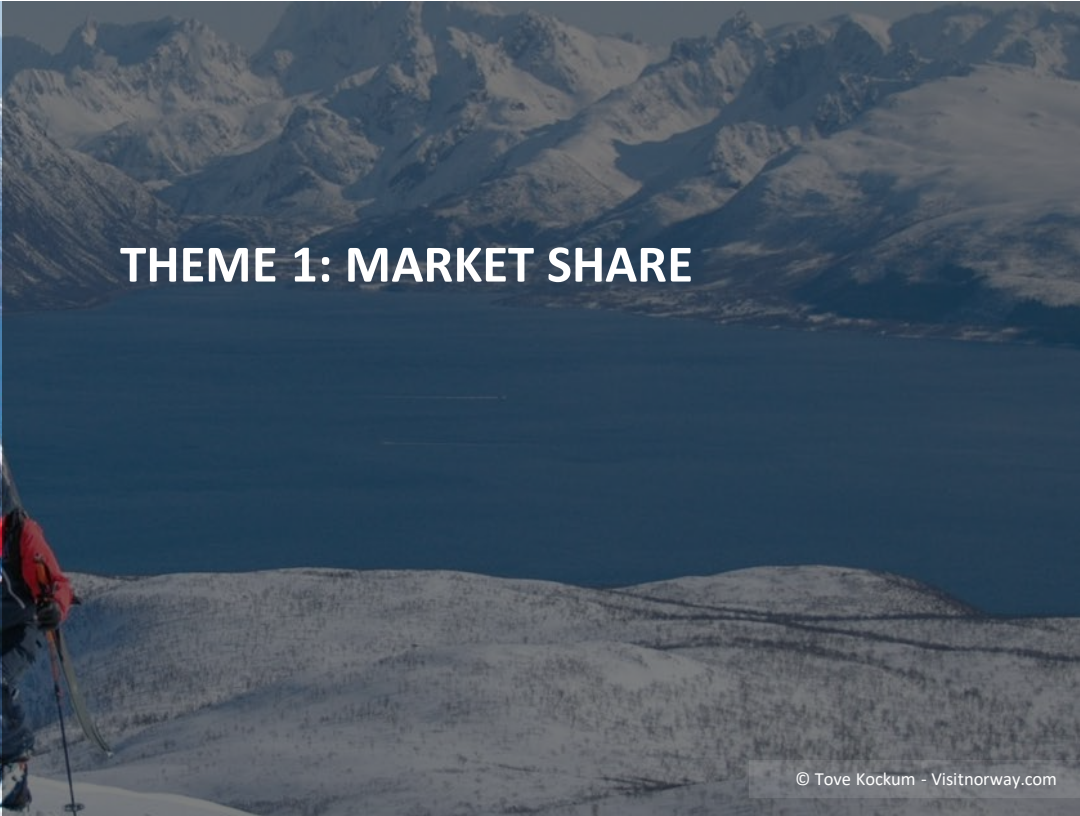
- **Travels:** The market share for each country is calculated by looking at the number of travels that have gone to a specific country as a percentage of all travels.
- **Travellers:** The market share for the specific country is calculated by looking at the size of the travel group that the respondent 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.



# NORWAY'S MARKET SHARE IN THE UNITED KINGDOM HAS DECREASED SLIGHTLY

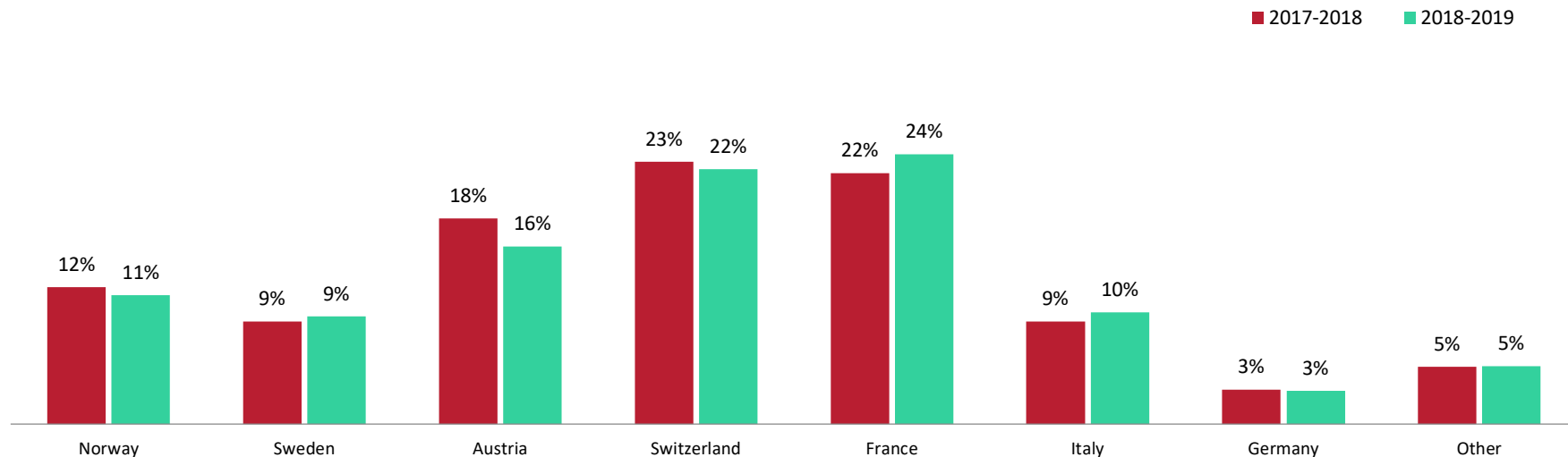
## KEY FINDINGS:

Measured by the share of travels undertaken by British skiers in the past skiing season, Switzerland and France remain the most popular destinations among the British skiers.

Norway's share of the British skiing market seems to have experienced a minor decrease from last season. However, as the difference is very small, this difference may be caused by statistical uncertainty rather than an actual change in the market.



Market share as percentages of travels



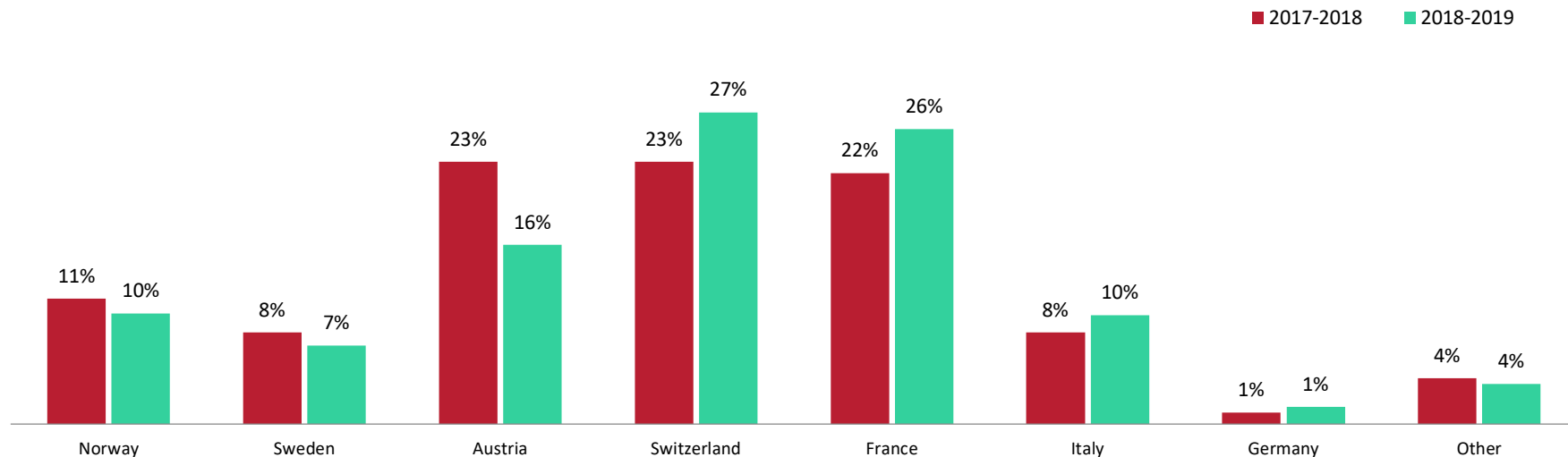
# NORWAY'S MARKET SHARE IN THE UNITED KINGDOM HAS DECREASED SLIGHTLY

## KEY FINDINGS:

Also when measuring by the share of travellers, Norway's market share seems to have decreased slightly from the 2017/2018 season. However, Austria's decrease is much more remarkable.



Market share as percentages of travellers



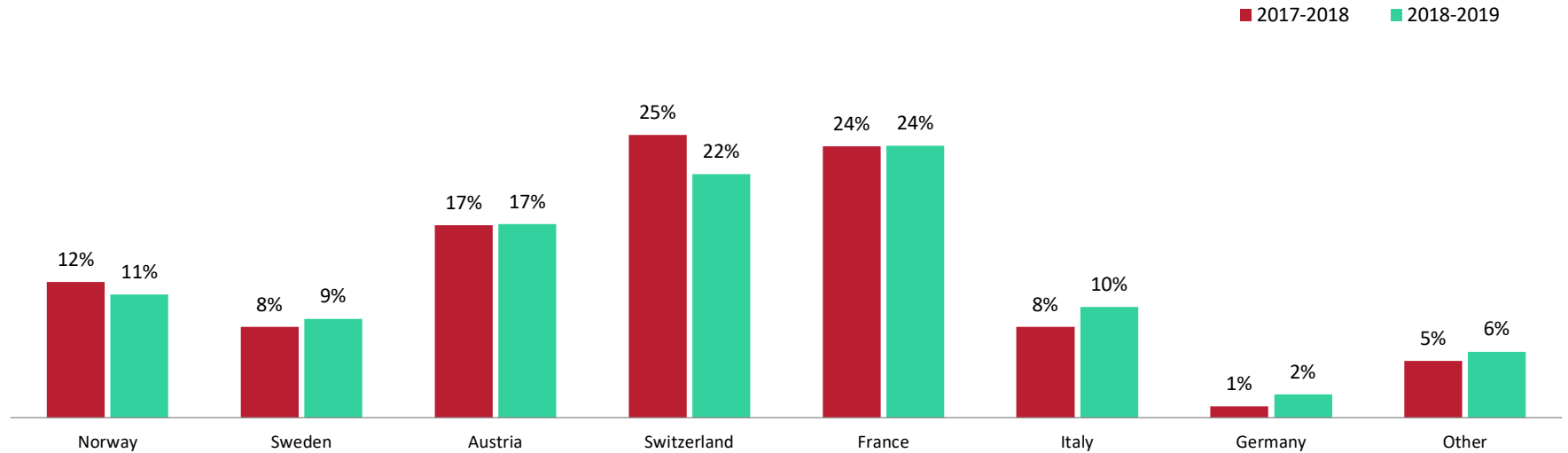
# NORWAY'S MARKET SHARE IN THE UNITED KINGDOM HAS DECREASED SLIGHTLY

## KEY FINDINGS:

Finally, when looking at market share in terms of the total number of nights spent by British skiers in each of the countries, once again Norway's market share has decreased slightly.



Market share as percentages of nights spent





# NORWAY HOLDS A LARGER MARKET SHARE AMONG CROSS COUNTRY SKIERS

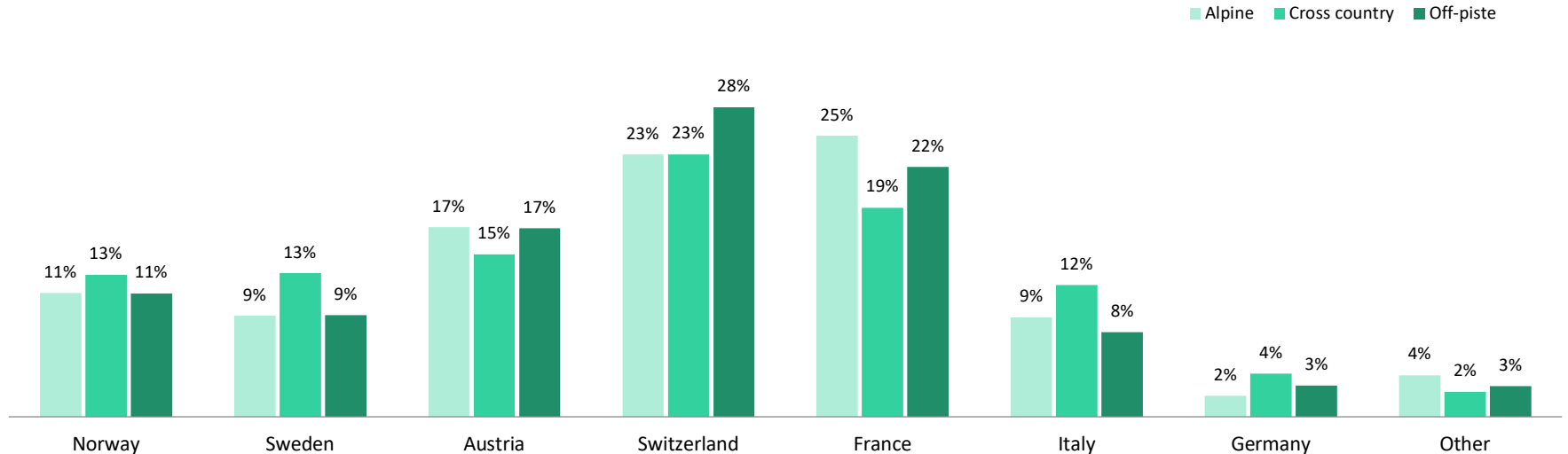
## KEY FINDINGS:

In this figure, we see that the market shares deviate slightly when distinguishing between the three different types of skiing.

Norway holds a slightly greater market share among the British cross country skiers than the alpine and off-piste skiers. However, even among cross country skiers, Austria, Switzerland and France hold greater market shares than Norway on the British market.



Market share of different skiing types as percentages of travels





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

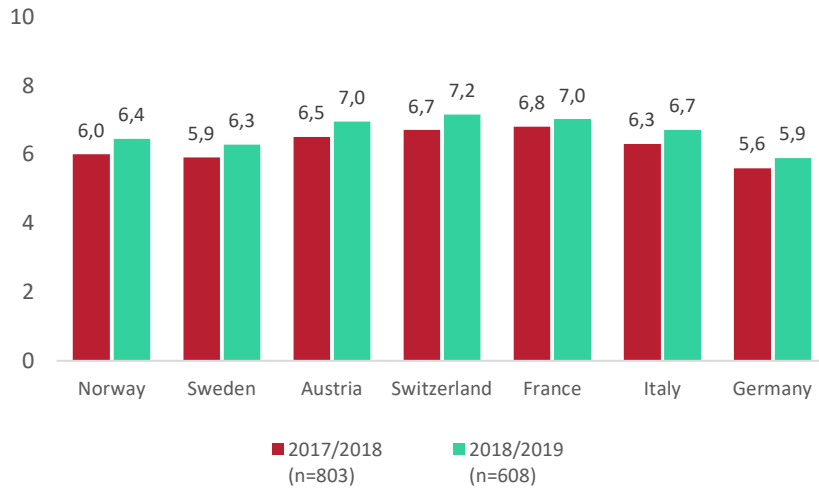
# BRITISH SKIERS FIND IT AS LIKELY TO GO SKIING IN NORWAY AS IN SWEDEN

## KEY FINDINGS:

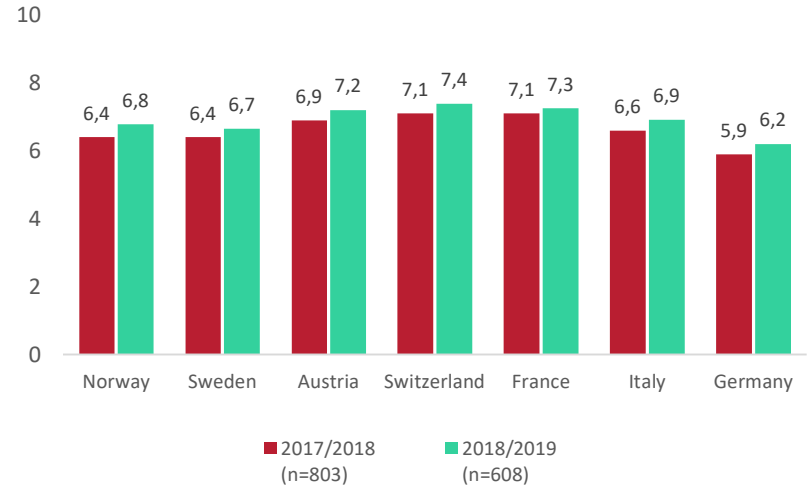
The British skiers find it quite likely to visit Norway next season or at another point of time in the future. The British skiers find it approximately as likely to visit Norway as Sweden, and less likely to visit Germany.



Average probability that British ski tourists visit each country next season



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



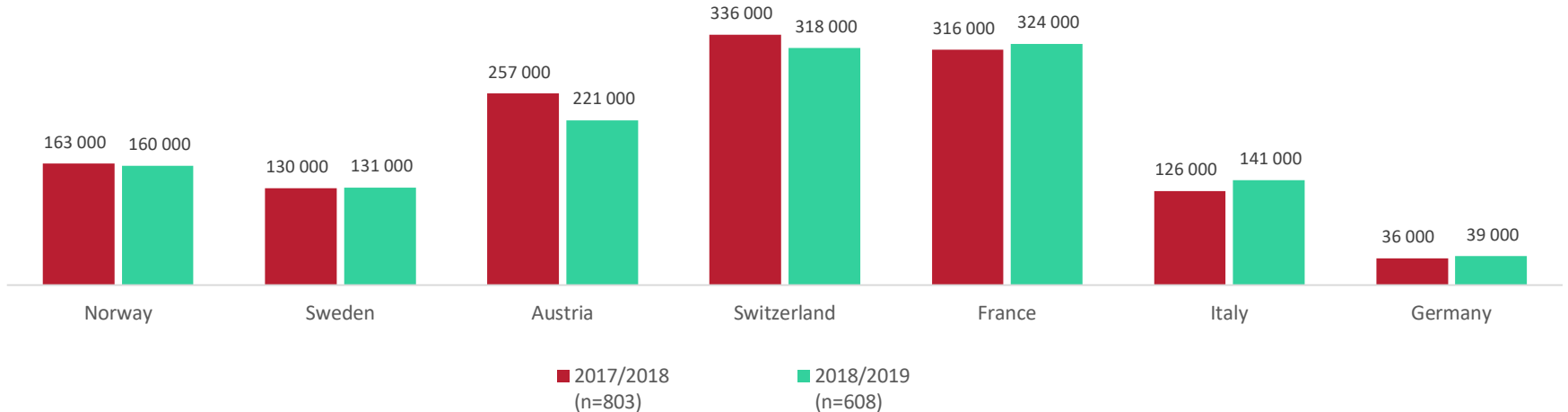
# AN ESTIMATED 160.000 BRITISH SKIERS VISITED NORWAY LAST SEASON ON A SKI HOLIDAY

## KEY FINDINGS:

An estimated 160.000 British ski tourists went skiing in Norway in the last season, which is on the same level as the previous season. The number of British ski tourists in Austria dropped by approximately 36.000 persons, while the estimated number of British ski tourists in Italy increased by about 18.000 persons.



Number of ski tourists from United Kingdom visiting the countries on a ski holiday during last season



# ABOUT 14% OF THE BRITONS HAVE BEEN ON AT LEAST ONE SKI HOLIDAY WITHIN THE LAST 5 YEARS

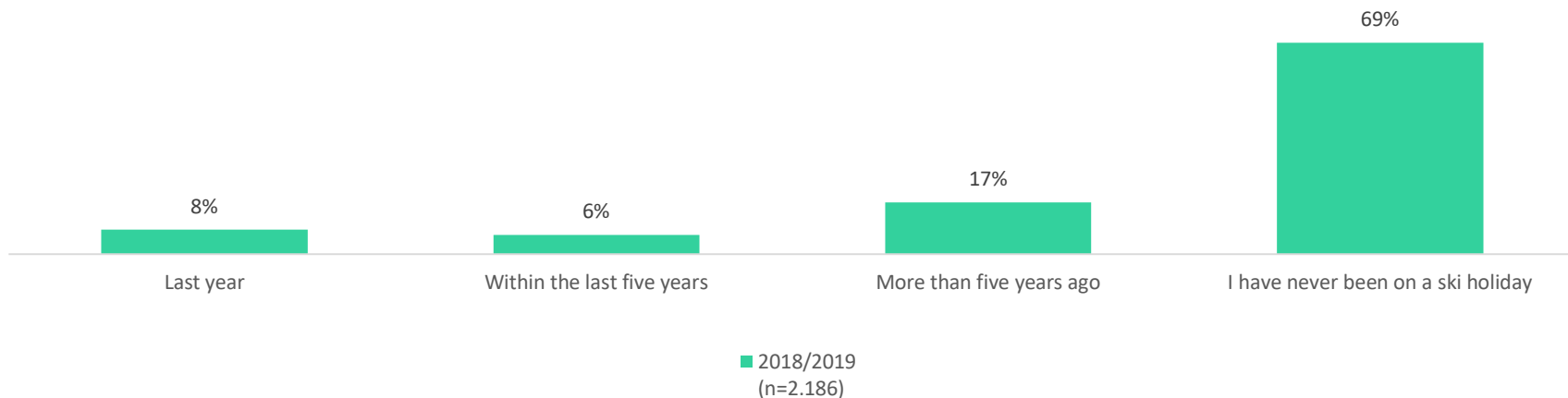
## KEY FINDINGS:

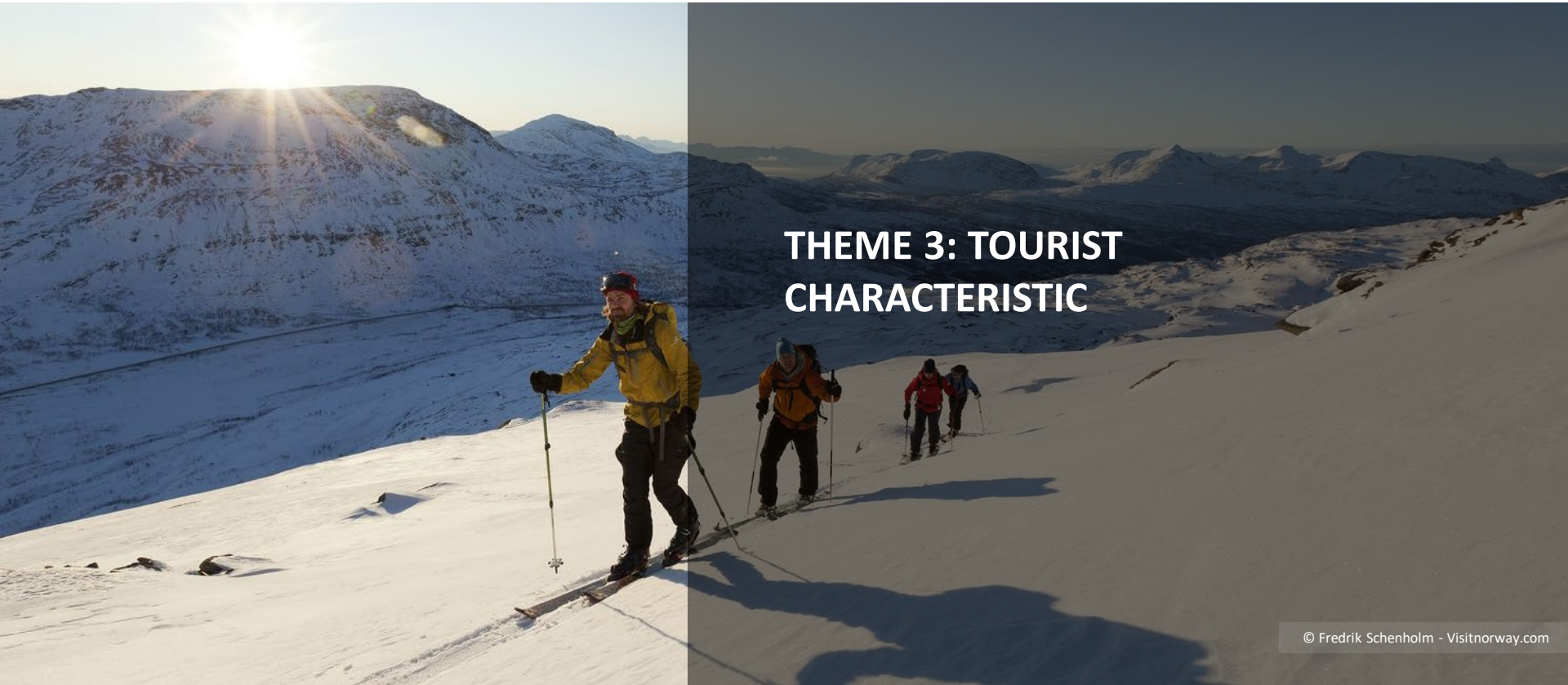
Around 14% of the British people living in the South East England and London have been on at least one ski holiday within the past 5 years. 8% went skiing in the last season.

This means that it is estimated that just above 1 million persons living in South East England and London went on a ski holiday during the last season.



Share of Britons who have been on a ski holiday





**THEME 3: TOURIST  
CHARACTERISTIC**

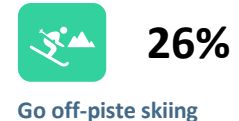
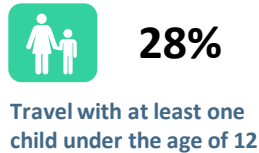
# CHARACTERISTICS OF A BRITISH SKI TOURIST

31% of the British skiers went on 2 ski holidays or more in the past season, while 69% went on just one ski holiday.

28% of the British ski tourists travel with at least one child under the age of 12 (possibly along with other companions as well).

56% travel in groups of 5 persons or more. 41% go on short holiday trips of 1-4 overnight stays.

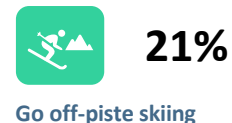
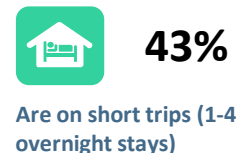
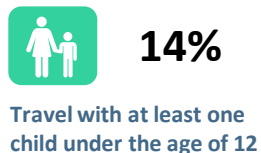
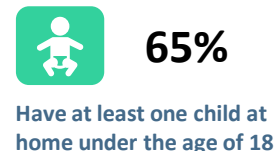
79% of the British skiers go alpine skiing or snowboarding, 41% go cross country skiing and 26% go off-piste skiing.



# CHARACTERISTICS OF A BRITISH SKI TOURIST IN NORWAY

In general, the British ski tourists going to Norway are similar to the British ski tourists travelling to other ski destinations.

Quite remarkably, however, 52% of the British ski tourists who went skiing in Norway, went on more than one ski holiday in the last season. Apart from Norway, most of them also went skiing in Austria, Sweden or Switzerland (not displayed in the figure).





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