

Summary:

Norwegian Foreign Visitor Survey 2008

The 2008 Foreign Visitor Survey covers in principle all travel to and from Norway by foreign residents, regardless of the purpose of the travel and/or accommodation used. Both holiday and business travel are included, and in 2008 the survey covers all travel out of the country by ferry, aeroplane, train, car, and chartered or scheduled coach. An overview of cruise ship traffic is also provided. Only those journeys made by residents of other countries with permanent work in Norway are excluded, largely because such travel does not fit with the notion of international *tourism*.

2008

The overall picture of guest traffic shows that in 2008 the total number of arrivals in Norway from abroad was almost 6.2 million. This includes around 4.45 million guests who spent the night in Norway, 1.35 million guests on day trips and 380,000 cruise passengers who visited one or more Norwegian ports.

Of those who stayed overnight in Norway, 1.2 million were on business trips and 3.25 million were on holiday trips. This traffic resulted in a total of 29 million nights spent in Norway by guests, an increase of one per cent from 2007. Business travellers accounted for 5.6 million of these guest nights, and tourists 23.7 million. The business traffic was relatively evenly distributed over the year, while 70 per cent of overnight stays by tourists were linked to the summer season (May-September).

After several years of strong growth, the *holiday and business traffic* fell by one per cent in terms of the number of arrivals in 2008. Overnight stays fell by two per cent, according to calculations. Among the large markets, the Nordic countries, the Netherlands, Poland and Russia experienced growth, while the fall was greatest for Great Britain, Italy, Switzerland and the USA.

On an annual basis, 28 per cent of the overnight stays by holiday guests were at the homes of relatives and friends, 23 per cent at camping sites (including camping outside regulated sites), 22 per cent at hotels or guest houses, and 21 per cent at holiday cabins.

It is calculated that around 55,000 foreign motor homes visited Norway in 2008. This is the highest number ever recorded. It is also calculated that 21,500 foreign cars towing caravans visited Norway in 2008. This figure is similar to that for 2007. The number of foreign tourist coaches has for the last few years been put at around 13-14,000, while in 2008 the number is 17,700. However, there is considerable uncertainty concerning this number since it is based on relatively few observations.

Foreign *business traffic* into Norway continues to grow strongly. Germany, Great Britain and the USA are the most important markets outside Scandinavia. Hotels are the most common form of accommodation used by foreign business travellers. Many also spend the night in flats or houses made available to them by their employer.

Around 1.35 million *day trippers* visited Norway in 2008, an increase of 3 per cent from the year before. *Cruise traffic* also increased. Calculations show that 380,000 cruise passengers made one or more day trips from Norwegian ports in 2008. The number of cruise passengers from Great Britain and Germany continues to grow strongly, while there are fewer and fewer Americans on cruises in Norwegian waters. Spain and Italy are also important markets for the Norwegian cruise industry.

Winter traffic

All travel

More than 1.15 million foreign overnight guests arrived in Norway in the first four months of 2008, an increase of nine per cent in relation to the year before. The number of guest nights increased by seven per cent overall. The growth was strongest among business travellers, who nonetheless still only accounted for 30 per cent of all arrivals during the winter season.

Table A shows the key overall numbers for winter traffic for the years 2006-2008.

Table A: Foreign business and holiday travel in Norway, winter seasons 2006–2008 (in thousands). Border registration upon departure from Norway.

	2006	2007	2008	Change in per cent 2007–2008	2008			
					By road	By ferry	By air	By rail/bus
Arrivals in total	1 357	1 416	1 537	9	656	293	557	32
Day trips	364	360	387	7	257	74	54	2
Overnight stays	993	1 056	1 150	9	399	218	503	30
– arrivals, business trips	273	307	354	15	56	19	271	9
– arrivals, holiday trips	720	749	797	6	344	200	232	21
Guest-nights in total	5 518	5 769	6 180	7	1 866	1 425	2 740	149
– guest-nights, business trips	1 082	1 285	1 466	14	174	116	1 125	51
– guest-nights, holiday trips	4 436	4 484	4 714	5	1 692	1 309	1 615	98

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Holiday and leisure travel

The neighbouring countries of Sweden and Denmark are the most important for Norwegian winter tourism, although Germany and Great Britain are also important markets (Table B). The large Danish winter holiday market has been stagnant/in decline for a number of years, but showed clear growth in 2008 with respect to both arrivals and guest nights. The Swedish market grew by two per cent in 2008 in terms of the total number of guest nights. The number of holiday

guests from Germany increased by ten per cent, while the number of British winter holiday guests fell by five per cent between 2007 and 2008.

Table B: Foreign holiday travel in Norway, winter seasons 2006-2008 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

Total	720	749	797	6	4 436	4 484	4 714	5
Sweden	245	250	258	3	980	1 002	1 020	2
Denmark	209	201	219	9	1 291	1 167	1 332	14
Finland	17	18	18	-2	74	85	80	-6
United Kingdom	63	64	61	-5	452	421	401	-5
The Netherlands	16	15	18	13	122	113	121	7
Germany	63	63	69	10	520	508	558	10
Other Europe	72	97	110	13	638	792	797	1
USA	11	11	10	-2	129	89	98	10
Other nations	20	30	34	13	230	307	307	0

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More than half of all overnight guests who came to Norway on their winter holidays in 2008 said they were on a *skiing holiday*. This corresponds to around 420,000 *skiing tourists*, who spent a total of 2.8 million guest nights in Norway. On average the German skiing tourists stayed in Norway longer than skiing tourists from Sweden and Denmark. More than three quarters of the overnight stays were in cabins: rented, borrowed or self-owned cabins. Danish, Swedish and British skiing tourists tended strongly towards alpine skiing, while Germans largely focused on cross-country skiing/touring.

Summer traffic

All travel

Table C gives a picture of foreign guest traffic in Norway between the months of May to September 2008. Excluding cruise passengers, a total of around 3.145 million foreign visitors came to Norway in the summer of 2008. 2.5 million foreign guests spent one or more nights in the country, which corresponds to around 19.5 million guest nights. 80 per cent of overnight guests were on holiday trips, the other 20 per cent were on business trips. Holiday guests accounted for 85 per cent of the total guest nights in the summer season.

A large percentage of the summer arrivals occurred by car at the road border crossings with Sweden and Finland, though a lot of these involved people who were on day trips and who did not spend the night in Norway. Of those making overnight stays, 40 per cent arrived by aeroplane and 39 per cent by road. The other means of arrival were ferry (19 per cent) and train/coach (2 per cent).

Table C: Foreign business and holiday travel in Norway, summer season 2008 (in thousands). Border registration upon departure from Norway.

	Total	By road	By ferry	By air	By rail/bus
Arrivals in total	3 145	1 416	574	1 101	54
- Day trips	638	449	99	85	5
- Overnight stays	2 507	967	475	1 016	49
-- arrivals, business trips	500	86	39	365	10
-- arrivals, holiday trips	2 008	881	436	651	40
Guest-nights in total	19 474	5 743	5 080	8 313	338
- guest-nights, business trips	2 895	438	309	2 077	71
- guest-nights, holiday trips	16 579	5 305	4 771	6 236	267
Number of vehicles					
Private cars	564	451	113		
Camper van	53	47	5		
Private cars with caravan	21	18	3		
Buses	11	6	5		

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Both the number of guests staying overnight and the total number of nights spent fell by 1 per cent in the summer of 2008. The average stay was 7.8 nights, the same as in 2007. Most of the overnight guests came from Sweden and Germany, though many also came from Denmark, Finland, Great Britain and the Netherlands. The number of guests from Sweden, Poland and Russia grew significantly, while the clearest reductions were in the numbers coming from Great Britain, Italy, Switzerland, Spain and the USA, among others.

The length of stays in Norway varies a lot, depending to a certain extent on the guest's country of residence (Table D). While Swedes and Finns spent an average of three to four nights in Norway, Dutch and German guests spent between ten and 11 nights. Germany is clearly the largest single market in terms of the number of overnight stays, with almost 4.7 million guest nights. Sweden, Denmark, the Netherlands, Great Britain, Poland and the USA also represent substantial guest nights volumes in the summer.

Table D: Foreign guest nights in Norway by country of residence, summer seasons 2005–2008, and by mode of transport upon departure, summer season 2008 (thousands).

	2005	2006	2007	2008		2008			
	Total	Total	Total	Total	Length of stay	By road	By ferry	By air	By rail/bus
Total	17 449	18 388	19 727	19 474	7,8	5 743	5 080	8 313	338
Sweden	1 909	2 100	2 165	2 420	4,5	1 589	100	557	174
Denmark	1 672	1 486	1 568	1 593	7,0	332	702	541	18
Finland	703	607	690	732	3,7	603	1	126	2
United Kingdom	1 193	1 440	1 333	1 251	7,3	49	190	1 002	10
The Netherlands	1 297	1 324	1 492	1 577	11,1	650	559	359	9
Belgium	235	233	250	228	9,2	32	46	148	2
France	677	830	856	793	8,9	184	22	580	7
Germany	4 717	4 673	4 838	4 670	10,3	1 175	2 627	850	18
Italy	415	390	392	308	8,1	92	14	194	8
Switzerland	316	272	271	211	8,6	49	23	130	9
Austria	150	121	160	152	7,7	70	14	66	2
Spain	407	420	458	427	9,3	17	2	396	12
Poland*		683	908	1 269	10,2	544	37	688	0
Russia	136	201	220	286	8,6	145	0	139	2
Other Europe	1 474	1 153	1 258	1 291	8,7	212	385	685	9
USA	1 081	1 339	1 451	1 014	11,3	0	8	983	23
Japan	134	137	112	109	5,0	0	0	106	3
Other nations	933	979	1 305	1 143	9,8	0	350	763	30

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* Poland is included with the rest of Europe in 2005

Overnight stays were made most often at hotels or boarding houses. 26 per cent of overnight stays were made in such accommodation in the summer of 2008. The second most frequent form of overnight accommodation was staying with relatives or friends (22 per cent). 21 per cent of overnight stays were at camping sites. Cabins were also popular (15 per cent). Three per cent of all foreign overnight stays were made aboard the Hurtigruten coastal express. There were only minor changes in the nature of overnight stays from 2007 to 2008.

Holiday and leisure travel

In the summer of 2008, two million foreign overnight guests arrived in Norway on holiday trips (Table E). This represents a fall of four per cent from 2007. The guests spent an average of 8.3 nights in the country, which corresponds to 16.6 million guest nights. Germany accounted for what was decidedly the largest proportion of foreign guest nights – 26 per cent – in the summer of 2008.

Table E: Foreign holiday travel in Norway, summer seasons 2006-2008 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

	Number of arrivals				Number of guest-nights			
	2006	2007	2008	Change in per cent 2007-2008	2006	2007	2008	Change in per cent 2007-2008
Total	1 981	2 085	2 008	-4	16 157	17 260	16 579	-4
Sweden	387	392	404	3	1 724	1 772	1 863	5
Denmark	176	186	177	-5	1 250	1 359	1 327	-2
Finland	172	183	183	0	556	622	668	7
United Kingdom	139	132	111	-16	1 212	1 083	945	-13
The Netherlands	107	129	124	-4	1 228	1 393	1 472	6
Germany	416	429	404	-6	4 387	4 550	4 316	-5
Poland	50	68	105	54	619	796	1 070	34
Other Europe	346	352	340	-3	3 252	3 367	3 138	-7
USA	94	102	67	-35	1 119	1 222	828	-32
Other nations	94	112	93	-17	810	1 096	952	-13

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The most common form of overnight accommodation in the summer of 2008 for holiday guests was camping, either in camping cabins, tents, motor homes, or in caravans. This category accounted for 30 per cent of overnight stays. 24 per cent of overnight stays were made in hotels or boarding houses, while 23 per cent of overnight stays were made at the homes of relatives or friends.

In the summer of 2008, overnight guests who were on holiday or visiting relatives and friends were asked what they thought of their household's total income in relation to the general level of income in their own country. The differences between some countries were relatively large. Most Americans and Brits stated that their incomes were higher than the average for their home country, while guests from Germany and the Nordic countries had the lowest proportion of holiday guests who assessed their own level of income as relatively high.

Business and official travel

Business traffic measured by the number of arrivals grew by ten per cent in the summer of 2008. The average stay in Norway increased from 5.4 nights to 5.8 nights. The growth in the number of guest nights linked to business travel was therefore no less than 17 per cent. Aeroplanes are the dominant means of transport for business travellers from abroad, and 38 per cent of overnight stays were in hotels, boarding houses, etc.