

Summary:

Norwegian Foreign Visitor Survey 2009

Foreign holiday and business travel in Norway

The Norwegian Foreign Visitor Survey 2009 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 2009 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*.

The year 2009

In 2009 the calculated total number of arrivals in Norway from abroad was just over 6.0 million. This includes around 4.29 million guests who spent at least one night in Norway, 1.33 million guests on day trips, and 430,000 cruise passengers who visited one or more Norwegian ports.

Of those who stayed overnight in Norway, 1.05 million were on business trips and 3.24 million were on holiday trips. In total, the visitors generated 28.3 million guest nights in Norway; a decrease of two per cent from 2008. Business travellers accounted for 5.3 million of these guest nights, and tourists 23.0 million. The business traffic was relatively evenly distributed over the year, while 70 per cent of overnight stays took place during the summer season (May-September).

After a decrease in 2008, the *holiday and leisure traffic* grew by one per cent in terms of the number of arrivals in 2009. The number of guest nights, however, fell by one per cent, according to calculations. Among the larger markets, the Nordic countries, Poland and Russia experienced growth during the overall period 2004 - 2009, while the decline was greatest in relative terms for Italy, USA and Japan.

On an annual basis, 26 per cent of the overnight stays by holiday guests were spent at the homes of relatives and friends, 18 per cent at camping sites (including camping outside regulated campgrounds), 23 per cent at hotels or guest houses, and 21 per cent at holiday cabins.

It is calculated that around 54,600 foreign motor homes visited Norway in 2008. Although 400 fewer than in 2008, this is the second highest number ever recorded. It is also calculated that 20,400 foreign cars towing caravans visited Norway in 2009, which is 900 less than the year before. From the top recording of foreign tourist coaches of 17,700 in 2008, the number was reduced to 15,200 in 2009. However, there is considerable uncertainty concerning these numbers, since they are based on relatively few observations.

After several years of growth in foreign *business traffic* into Norway, there was a decline of seven per cent in business related arrivals during 2009, and a decline of five percent in guest nights. Germany, Great Britain and the USA are still the most important markets outside Scandinavia, although all these source markets showed a considerable decrease from 2008 to 2009. 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 1.33 million *day trippers* visited Norway in 2009, which is about even with the year before. *Cruise ship traffic* also increased from 2008 to 2009 by 49,000 passengers, to a total 430,000. The number of cruise passengers from Germany continues to grow strongly. The number increased by 21,000 to 116,000 from 2008 to 2009. The number of British passengers increased by 3 000 to 118,000, while number of American passengers remained at 50,000. Spain, Italy, The Netherlands, and France are also important markets for the Norwegian cruise industry.

Winter traffic

All travel

About 1.09 million foreign overnight guests arrived in Norway during the first four months of 2009, which is a decrease of four per cent in relation to the year before. However, the number of guest nights was on par with the year before. The number of overnight guests on holiday was about the same as in 2009, while there was noticeable decrease of 13 per cent for business travellers. Business travellers, however, only accounted for 29 per cent of all arrivals during the winter season.

Table A shows the key overall numbers for winter traffic for the years 2007-2009.

Table A: Foreign business and holiday travel in Norway, winter seasons 2007–2009 (in thousands). Border registration upon departure from Norway.

	2007	2008	2009	Change in per cent 2008–2009	2009			
					By road	By ferry	By air	By rail/bus
Arrivals in total	1 416	1 515	1 456	-4	644	269	509	33
- Day trips	360	383	365	-5	245	68	50	2
- Overnight stays	1 056	1 131	1 091	-4	399	202	460	31
-- arrivals, business trips	307	337	294	-13	57	15	216	7
-- arrivals, holiday trips	749	794	797	0	342	187	244	24
Guest-nights in total	5 769	6 044	6 060	0	1 903	1 288	2 645	224
- Guest-nights, business trips	1 285	1 398	1 302	-7	200	108	956	38
- Guest-nights, holiday trips	4 484	4 646	4 758	2	1 703	1 180	1 689	186

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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). It is the Swedish holiday guests who are responsible for the growth in the number of holiday guest nights, while the other main international markets all had a decline. The large Danish winter holiday market showed a decrease in terms of guest nights in Norway during the winter season 2009, but is still above 2007-level. The number of British winter holiday guests grew with seven percent in terms of arrivals, although the number of British guest nights fell by six percent. Holiday guests from Germany decreased by eight per cent, both measured in number of arrivals and guest nights.

Table B: Foreign holiday travel in Norway, winter seasons 2007-2009 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

	Number of arrivals				Number of guest nights			
	2007	2008	2009	Change in per cent '08-'09	2007	2008	2009	Change in per cent '08-'09
Total	749	794	797	0	4 484	4 646	4 758	2
Sweden	250	256	267	4	1 002	1 015	1 273	25
Denmark	201	218	206	-6	1 167	1 325	1 243	-6
Finland	18	18	16	-8	85	77	65	-16
United Kingdom	64	60	64	7	421	391	369	-6
The Netherlands	15	17	17	-2	113	117	113	-3
Germany	63	67	61	-8	508	547	502	-8
Other Europe	97	115	123	7	792	797	851	7
USA	11	10	11	10	89	93	92	-1
Other nations	30	33	32	-3	307	296	250	-15

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Approximately 430,000 *skiing tourists* came to Norway on their winter holidays in 2009. More than half of all overnight guests who completed the survey reported that they were on a *skiing holiday*. This corresponds to around three million guest nights spent in Norway by foreign skiers. On average, the German ski tourists stayed in Norway 3-4 days longer than ski tourists from Sweden and Denmark. About two thirds of the overnight stays were made in cabins, including rented, borrowed, or own property cabins. Most of the ski tourist report to be fairly skilled in skiing. Few are beginners, while the largest share of beginner-level skiers came from non-Nordic countries.

Summer traffic

All travel

Table C depicts the main features of foreign guest traffic in Norway from May to September 2009. Excluding cruise passengers, a total of around three million foreign visitors came to Norway in the summer of 2009. Close to 2.4 million foreign guests spent one or more nights in the country, which corresponds to around 18.5 million guest nights. That is about one million fewer guest nights than in 2008. Over 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, which is similar to the year before.

A large percentage of the summer arrivals occurred by car at the road border crossings with Sweden and Finland, although one out of three of these visitors were on day trips, and did not spend the night in Norway. Of those making overnight stays, 47 per cent arrived by road and 32 per cent by aeroplane. The share of airborne tourist fell considerably from 41 percent in 2008, and road tourist share grew accordingly. The other main means of arrival were ferry (18 per cent) and train/coach (2 per cent).

Table C: Foreign business and holiday travel in Norway, summer season 2009 (in thousands). Border registration upon departure from Norway.

	Total	By road	By ferry	By air	By rail/bus
Arrivals in total	3 080	1 471	567	986	56
- Day trips	645	466	103	72	4
- Overnight stays	2 435	1 005	464	914	52
-- arrivals, business trips	452	91	32	321	8
-- arrivals, holiday trips	1 983	914	432	593	44
Guest-nights in total	18 495	5 537	5 028	7 595	335
- Guest-nights, business trips	2 683	418	269	1 942	54
- Guest-nights, holiday trips	15 812	5 119	4 759	5 653	281
Number of vehicles					
Cars	596	482	114		
Camper cars/RVs	52	46	6		
Cars with caravans	20	17	3		
Busses/coaches	9	7	2		

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The number of guests staying overnight fell by one per cent, and the total number of nights spent fell by two per cent during the summer of 2009. The average stay was 7.6 nights, which is slightly shorter (0.2 nights) than in 2008. 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 grew substantially (17 percent), while the Germans recaptured some of the decline from 2007 to 2008. The Danes were at about the same level, while the recent growth markets of Poland and East European countries were among the markets in Europe with the most noticeable decline. The number of tourists coming from the USA and Japan showed noticeable decline.

The average 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 about four nights in Norway, Dutch, Polish and German guests spent between 10 and 11 nights in the country. Germany is clearly the largest single market in terms of the total number of overnight stays. With almost 4.4 million guest nights, the Germans outnumbered visitors from Sweden and Denmark in terms of guest nights. Sweden, Denmark, the Netherlands, Great Britain, Poland and the USA also represent substantial guest nights volumes in the summer season.

Table D: Foreign guest nights in Norway by country of residence, summer seasons 2006–2009, and by mode of transport upon departure, summer season 2009 (thousands).

	2006	2007	2008	2009		2009			
	Total	Total	Total	Total	Length of stay	By road	By ferry	By air	By rail/bus
Total	18 388	19 727	18 943	18 495	7.6	5 537	5 028	7 595	335
Sweden	2 100	2 165	2 387	2 658	4.3	1 919	75	518	146
Denmark	1 486	1 568	1 509	1 437	6.7	331	682	415	9
Finland	607	690	731	716	3.9	604	1	109	2
United Kingdom	1 440	1 333	1 163	1 007	7.1	27	89	884	7
The Netherlands	1 324	1 492	1 570	1 379	9.9	484	569	323	3
Belgium	233	250	227	212	9.5	38	43	124	7
France	830	856	791	772	8.9	197	24	543	8
Germany	4 673	4 838	4 386	4 382	10.0	982	2 554	824	22
Italy	390	392	307	306	8.4	90	14	191	11
Switzerland	272	271	210	218	8.9	68	27	114	9
Austria	121	160	151	162	8.7	93	8	55	6
Spain	420	458	427	412	9.3	46	2	360	4
Poland	683	908	1 263	1 006	10.9	338	37	631	0
Russia	201	220	285	286	9.3	163	0	121	2
Other Europe	1 153	1 258	1 294	1 257	8.3	154	425	627	41
USA	1 339	1 451	1 013	901	11.1	0	9	876	16
Japan	137	112	109	92	5.2	0	0	89	3
Other countries	979	1 305	1 140	1 292	9.9	3	459	791	39

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Overnight stays with friends and relatives (22 percent guest nights) have surpassed hotels or boarding houses (20 per cent) as the most common form of accommodation during the summer of 2009. The third most frequent form of overnight accommodation was camping sites (21 per cent). Cabins were also popular (17 per cent), and a bit more frequently used in 2009 than the year before. Three per cent of all foreign overnight stays were made aboard the *Hurtigruten* coastal express. Overall, there were only minor changes in the nature of overnight stays during the summer period from 2006 to 2009.

Holiday and leisure travel

During the summer of 2009, around two million foreign overnight guests arrived in Norway on holiday trips (Table E). The decline in 2008 of four per cent has changed into a slight increase of one per cent in 2009. The guests spent an average of 8.0 nights in the country, which is 0.2 nights shorter than in 2008. This reduction implies a slight decline in number of guest nights from 16.1 million in 2008 to 15.8 million in 2009. Germany accounted for what was decidedly the largest proportion of foreign guest nights – 24 per cent – in the summer of 2009; twice as much as the number of Swedish guest nights.

Table E: Number of arrivals and guest nights for foreign holiday visitors with at least one overnight in Norway, summer seasons 2007–2009, and by mode of transport upon departure, summer season 2009 (in thousands).

	2007	2008	2009	2009			
	Total	Total	Total	By road	By ferry	By air	By rail/bus
Overnight holiday visitors	2 085	1 960	1 983	914	432	593	43
Guest nights	17 260	16 090	15 812	5 119	4 759	5 653	281
Average length of stay	8.3	8.2	8.0	5.6	11.0	9.5	6.5

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The most common form of overnight accommodation in 2009 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. Another 22 per cent of overnight stays were made in hotels or boarding houses, which is a slightly lower share than in 2008 (24 percent). Around 23 per cent of overnight stays were made at the homes of relatives or friends - like the year before.

The foreign holiday visitors who came to Norway during the summer 2009, reported residing in quite different places in terms of level of urbanization. There was a slight majority (27 per cent) reported being from a middle-sized city (in European terms) with between 50,000 and 500,000 inhabitants, while slightly less (26 percent) came from a city with more than half a million people. One out of four came from a rural area or small town, while the minority resided in a smaller city of 50,000 or less.

Business and official travel

Business traffic measured by the number of arrivals fell by 10 per cent in the summer of 2009, which brought the numbers back to about 2007-level. The average length of stay in Norway increased from 5.8 nights to 5.9 nights. In sum, that resulted in a decrease to 2.68 million business-related guest nights, which were 170,000 fewer nights than during the previous summer.

Aeroplanes are still the dominant means of transport for business travellers from abroad, with air travellers representing 72 per cent of guest nights. About 36 per cent of overnight stays were made in hotels, boarding houses, etc., which is approximately two percentage points lower than in 2008.