

Summary:

Norwegian Foreign Visitor Survey 2010

In 2010 a total of 4.8 million foreign guests stayed overnight in Norway, while 1.4 million were on a day trip from abroad. Both holiday and business travel from abroad showed a 10 per cent increase from 2009 to 2010, as measured by the number of overnight guests. Foreign overnight visitors spent a total of 31.3 million guest nights in Norway in 2010, 9 per cent more than in 2009. The most important source markets for overnight visitors are Germany, Sweden and Denmark. German overnight arrivals grew by 18 percent in 2010, and in 2010 Norway had more tourist arrivals than ever before.

The 2010 Norwegian Foreign Visitor Survey covers in principle all travel to and from Norway by foreign residents, regardless of travel purpose and accommodation used. Both holiday and business travels are included, and in 2010 the survey covers all travel out of the country by ferry, aeroplane, train, car, and chartered or scheduled bus or coach. An overview of cruise ship traffic is also provided. Only those journeys made by foreign residents commuting to Norway are excluded, largely because such travel does not fit with the notion of international *tourism*.

The year 2010

In 2010 the calculated total number of arrivals in Norway from abroad was just below 6.6 million (table A). This number includes around 4.8 million guests who spent at least one night in Norway, 1.4 million guests on day trips, and 411,000 cruise passengers who visited one or more Norwegian ports.

Table A: Foreign business and holiday travel in Norway 2010 (in thousands). Border registration upon departure from Norway.

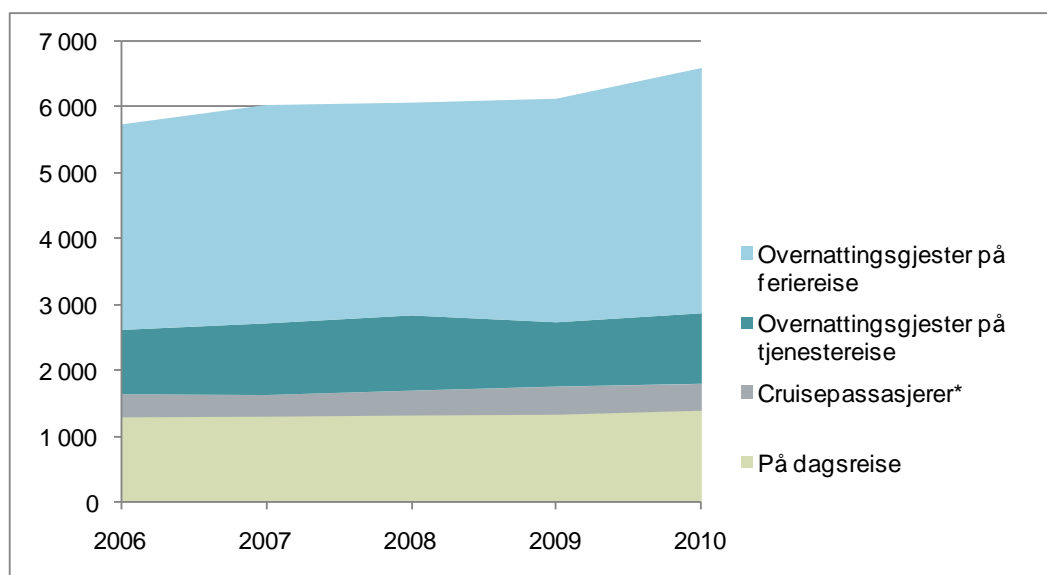
	Total	By road	By ferry	Cruise	By air	By rail/bus
Arrivals in total	6 578	2 820	1 038	411	2 182	127
- Day trips	1 400	1 001	213		174	12
- Cruise passengers	411			411		
- Overnight stays	4 767	1 819	824		2 008	115
-- business trips	1 064	229	66		747	22
-- holiday trips	3 703	1 590	758		1 261	93
Guest nights in total	31 346	8 995	7 721		14 050	580
- business trips	5 257	913	462		3 774	108
- holiday trips	26 089	8 082	7 259		10 276	472
Number of motor vehicles	1 284	1 018	202			
Cars	1 188	1 000	188			
Camper cars/RVs	58	50	8			
Cars with caravans	21	18	3			
Busses/coaches	17	14	3			

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*Note: Numbers for cruise passengers refer to foreign passengers who have had one or several visits in Norwegian ports.

Of those who stayed overnight in Norway about 1.06 million were on business trips and 3.70 million on holiday trips. Overnight visitors spent a total of 31.3 million guest nights in Norway; a nine per cent increase from 2009. Business travellers accounted for 5.3 million of those guest nights, and tourists for 26.1 million. The business traffic was relatively evenly distributed over the year, while 70 per cent of holiday guest nights took place during the summer season (May-September).

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Figure A: Foreign business and holiday travel in Norway 2005- 2009 (thousand arrivals) by type of travel. (From top to bottom graph area: Holiday overnight guests, business overnight guest, cruise passengers, day visitors).

It is the *holiday and leisure* traffic that shows the biggest increase in the period 2006-2009 (figure A). The growth in the holiday traffic has continued through 2010 both measured by the number of arrivals, which increased by 10 percent, and by the number of guest nights, which increased by nine percent from 2009 to 2010. The growth in 2010 was much stronger than the year before. Among the larger markets there has been a considerable growth in the number of Swedish, German, Polish, and Russian guest nights in the time period from 2006 through 2010, while the decrease has been relatively largest for Japanese guest nights in that time period.

On an annual basis, 30 per cent of the guest nights by holiday visitors were spent at the homes of relatives or friends, 19 per cent at camping sites (including camping outside regulated campgrounds), 23 per cent at hotels or guest/boarding houses, and 22 per cent in either rented, borrowed or owned cabins.

The number of foreign motor homes has risen again after a decline in 2009. Approximately 58,400 foreign motor homes visited Norway in 2010, and visitors travelling in these vehicles spent a total of 2.1 million guest nights in the country. Those are the highest numbers ever recorded for motor homes/RVs in Norway. It is also calculated that 21,000 foreign cars towing caravans/campers visited Norway in 2010, which is about 200 more than the year before. The number of foreign scheduled buses or coaches visiting Norway was 17,100 in 2010, which is close to the top recording of 17,700 in 2008. The bus passengers generated just over 2.3 million guest nights altogether. However, there is considerable uncertainty concerning this number, since it is based on relatively few observations.

After a steep decline in foreign *business traffic* to Norway in 2009, there was again an increase of 10 per cent in the number of arrivals and eight per cent in

guest nights for business visitors. Germany, Great Britain and the USA are still the most important markets outside Scandinavia as measured in business travel guest nights. Business travel from the two first-named nations showed growth again in 2010, while business travel from the USA is declining. Hotels are still the most commonly used form of accommodations for foreign business visitors. Many such visitors also spend the night at accommodations (e. g. houses or apartments) provided by their employer.

Around 1.40 million *day visitors* visited Norway in 2010, which is about 62,000 more than the year before. *The cruise ship traffic* has increased considerably over the last few years. However, the calculations show a small decline in the number of foreign cruise passengers who have had one or more visits in Norwegian ports (411,000), compared to the top year 2009 (430,000). Yet, the number of cruise ship visits in Norwegian harbours in 2010 is the largest ever recorded with 1.647 ships. There was still a considerable growth in cruise passengers from Germany, who accounted for 34 per cent of all foreign cruise passengers in Norwegian ports. There was, however, a decrease in passengers from other countries in Norwegian waters compared to the year before.

Winter season

Overall figures

About 1.1 million foreign guests spent at least one night in Norway during the first four months of 2010, an increase of two per cent in relation to the year before. The number of guest nights grew by three per cent from the preceding year (Table B).

Table B: Foreign business and holiday travel in Norway, winter seasons 2006-2010 (in thousands). Border registration upon departure from Norway

	2006	2007	2008	2009	2010	Change in per cent 2009-2010
Arrivals in total	1357	1 416	1 515	1 456	1 472	1
- Day trips	364	360	383	365	358	-2
- Overnight stays	993	1 056	1 131	1 091	1 114	2
-- business trips	273	307	337	294	327	11
-- holiday trips	720	749	794	797	787	-1
Guest nights in total	5 518	5 769	6 044	6 060	6 232	3
- business trips	1 082	1 285	1 398	1 302	1 506	16
- holiday trips	4 436	4 484	4 646	4 758	4 726	-1

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The number of overnight guests on holiday was a bit lower than in 2009, while the increase by 11 per cent for business travellers was the most noticeable development. Business travellers, however, only accounted for 29 per cent of all arrivals during the winter season.

Holiday and leisure travel

The neighbouring countries of Sweden and Denmark are the most important markets for foreign winter tourism in Norway, although Germany and Great Britain also constitute important markets (Table C). German, British, and Polish holiday guests account for most of the growth in the number of holiday guest nights, while the two main markets Sweden and Denmark had a decline in 2010. The number of German guest nights increased by 12 per cent and the number of British guest nights rose by 10 percent. There was also a relative increase in guest nights from other countries than those specified in the table.

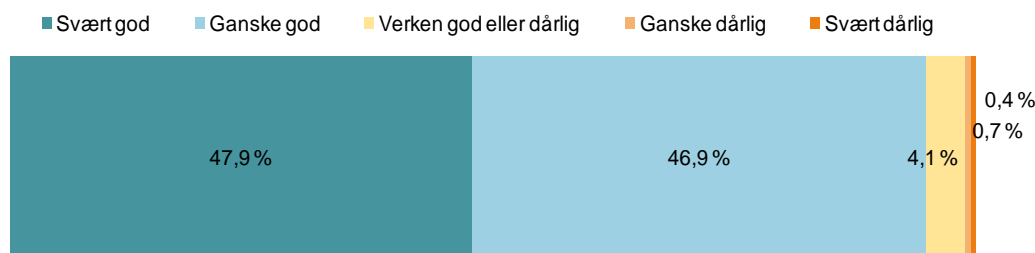
Table C: Foreign holiday travel in Norway winter seasons 2008-2010 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

	Number of arrivals				Number of guest nights			
	2008	2009	2010	Change in per cent 2009-2010	2008	2009	2010	Change in per cent 2009-2010
Total	794	797	787	-1	4 646	4 758	4 726	-1
Sweden	256	267	261	-2	1 015	1 273	1 139	-11
Denmark	218	206	193	-6	1 325	1 243	1 135	-9
Finland	18	16	18	9	77	65	68	5
Great Britain	60	64	63	-2	391	369	406	10
The Netherlands	17	17	16	-4	117	113	103	-9
Germany	67	61	69	13	547	502	564	12
Poland	34	37	35	-4	274	292	332	14
Other Europe	81	86	91	6	511	559	564	1
USA	10	11	10	-10	93	92	97	5
Other countries	33	32	31	-3	296	250	318	27

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Approximately 378,000 *ski tourists* came to Norway on their winter holidays in 2010. About 48 per cent of all overnight guests were on a *skiing holiday*. This corresponds to around 2.3 million guest nights spent in Norway by foreign skiers. On average, the German ski tourists stayed in Norway more than two days longer than ski tourists from Sweden and Denmark. Among ski tourists 73 per cent of guest nights are spent in either rented, borrowed or owned cabins. About 20 per cent of nights are spent in hotels or guest/boarding houses, while only two per cent are spent with friends or relatives.

Most tourists report that they are well pleased with their stay in Norway (figure B), and many state that they plan to return to Norway for another skiing holiday.



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Figure B: Evaluation of the visit to Norway by foreign ski tourist, winter season 2010 (per cent). (Ledger, left to right: Very Good, Quite good, Neither good nor bad, Quite bad, Very bad.)

Road and driving conditions generally receive positive evaluations by car tourists on Norwegian roads during the winter of 2010.

Summer season

Overall figures

Table D depicts the main features of foreign guest traffic in Norway in the period May - September 2010.

Table D: Table D: Foreign business and holiday travel in Norway, summer seasons 2006-2010 (in thousands). Border registration upon departure from Norway.

	2006	2007	2008	2009	2010	Percentage 2009-2010
Arrivals in total	3029	3167	3079	3 559	3 918	10
- Day trips	628	629	626	648	696	7
- Cruise passengers*	355	332	381	430	411	-4
- Overnight stays	2 401	2 539	2 453	2 481	2 811	13
-- business trips	420	454	494	413	462	12
-- holiday trips	1 981	2 085	1 960	2 069	2 350	14
Guest-nights in total	18 388	19 728	18 943	18 869	21 021	11
- business trips	2231	2 468	2 853	2 360	2 530	7
- holiday trips	16 157	17 260	16 090	16 509	18 491	12
Number of motor vehicles						
Cars	534	575	544	604	633	5
Motor homes/Camper cars	39	48	52	52	56	7
Cars with caravans	19	21	21	19	20	4
Busses/coaches	9	7	11	9	11	18

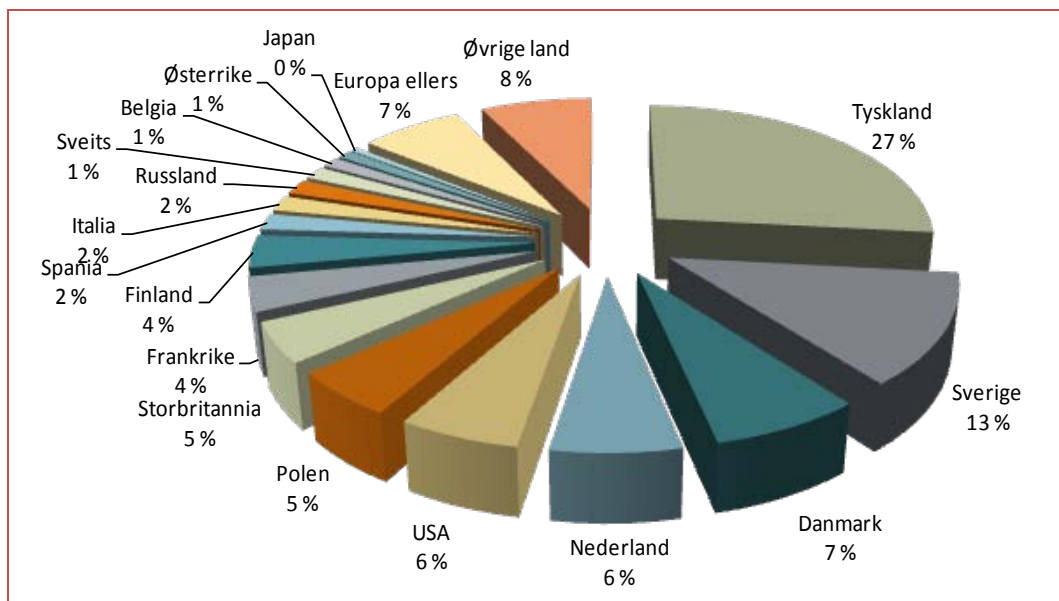
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*The number of cruise passengers includes all passengers who have visited Oslo port and/or Bergen port. From 2007 and onwards the numbers include passengers who have visited one or more Norwegian ports. All cruise visits are assumed to have taken place in the summer season.

Excluding cruise passengers, a total of 3.5 million foreign visitors came to Norway in the summer of 2010. That is around 400,000 more than the previous year. Close to 2.8 million foreign guests spent one or more nights in the country, corresponding to around 21 million guest nights. That is about 2.2 million more guest nights than in 2009. 84 per cent of overnight guests were on holiday trips, the remaining 16 per cent being on business trips. Holiday guests accounted for 87 per cent of the total number of guest nights in the summer season, a slightly higher share than in the previous year.

A large percentage of the summer arrivals occurred by car at the road border crossings with Sweden and Finland. About one third of these visitors were on day trips, and did not spend the night in Norway. Of those making overnight stays, about 40 per cent arrived by road and about an equal share by aeroplane. The share of airborne tourists grew again after a noticeable drop in 2009. The other main means of arrival were by ferry (18 per cent) and train/coach (one per cent).

The number of guests staying overnight increased by a full 13 per cent, and the total number of nights spent grew by 11 percent from the previous summer. The average stay was 7.5 nights, which is slightly shorter (0.1 nights) than in 2009. Most of the overnight guests came from Sweden, Germany, and Denmark. The number of overnight guests from Germany grew substantially (24 percent) compared to the previous summer.



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Figure C: Foreign guest nights in Norway by country of residence, summer season 2010 (percentage share).

The Germans also head the growth with respect to guest nights (28 per cent), while the number of Danish guest nights increased by nine per cent, and the Swedish total increased by two per cent. Germans accounted for 27 per cent of the total number of foreign guest nights during the summer of 2010 (figure C). The recent growth markets of Poland and Russia recovered somewhat after a sharp decline in 2009. Many markets in Europe (e.g. Belgium, Switzerland, Italy and

others) showed again a nice relative growth. However, there were some reductions in the number of Dutch and Japanese guest nights during the summer of 2010.

The average length of stay in Norway varies a lot, depending on the guests' country of residence (Table E). While Swedes and Finns spent an average of about four nights in Norway, Dutch, Polish, German and American (USA) guests spent between 9 and 11 nights in the country. Germany is clearly the largest single market in terms of the total number of guest nights. With almost 5.6 million guest nights, the Germans outnumbered visitors from all the Nordic countries combined in terms of guest nights. Sweden, Denmark, the Netherlands, Great Britain, Poland and the USA also represent substantial guest night volumes in the summer season.

Table E: Foreign guest nights in Norway by country of residence, summer seasons 2007–2010, and by mode of transport upon departure, summer season 2010 (thousands).

	2007	2008	2009	2010	% chg. 2009-10	2010				
						Avg. # nights	By road	By ferry	By air	By rail/bus
Total	19 727	18 943	18 869	21 021	11	7,5	6 128	5 736	8 826	331
Sweden	2 165	2 387	2 595	2 648	2	3,9	2 106	57	364	121
Denmark	1 568	1 509	1 405	1 526	9	6,5	372	668	476	10
Finland	690	731	729	781	7	4,1	647	1	132	1
Gr. Britain	1 333	1 163	933	963	3	7,1	21	130	799	13
Netherlands	1 492	1 570	1 386	1 308	-6	9,0	410	468	422	8
Belgium	250	227	190	247	30	7,0	34	49	158	6
France	856	791	796	818	3	8,5	197	21	594	6
Germany	4 838	4 386	4 389	5 599	28	10,1	1 135	3 459	986	19
Italy	392	307	339	381	12	8,6	131	6	234	10
Switzerland	271	210	254	313	23	9,3	62	26	216	9
Austria	160	151	182	199	9	8,3	88	12	93	6
Spain	458	427	388	398	3	7,8	44	2	346	6
Poland	908	1 263	942	1 094	16	9,6	401	27	664	2
Russia	220	285	282	371	32	8,9	207	0	162	2
Other Europe	1 258	1 294	1 257	1 456	16	9,6	266	437	690	63
USA	1 451	1 013	1 043	1 220	17	10,4	0	5	1 199	16
Japan	112	109	103	102	-1	4,9	0	0	100	2
Other countries	1 305	1 140	1 686	1 597	-5	10,5	7	368	1 191	31

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Overnight stays with friends and relatives (24 percent of guest nights) have nearly surpassed hotels and guest houses (20 + 5 per cent) as the most common form of accommodation during the summer measured in shares of guest nights. About 23 per cent of nights were spent camping at or outside of commercial camping sites. Rented, borrowed, or owned cabins were used a bit more (19 per cent) compared to the previous summer (17 per cent). Three per cent of all foreign overnight stays were made on board the *Hurtigruten* coastal ship express, which was the same share as in 2009 and 2008. Altogether there were only minor changes in the structure of overnight stays during the summer period from 2008 to 2010.

Holiday and leisure travel

During the summer of 2010, around 2.35 million foreign overnight guests arrived in Norway on holiday trips (Table F). The modest growth from 2008 to 2009 of one percent had escalated to 14 per cent growth in 2010. The summer guests spent an average of 7.9 nights in the country, which is a bit (0.1 nights) shorter than in 2009. Taken together this resulted in 18.5 million guest nights, almost two million more than in 2009, due to the growth in the number of arrivals. Germany accounted for what was decidedly the largest proportion of foreign guest nights (28 per cent) in the summer of 2010, which is more than all Swedish, Danish and Finnish guest nights during the summer of 2010 combined.

Table F: Number of arrivals and guest nights for foreign holiday visitors with at least one overnight in Norway, summer seasons 2008–2010, and by mode of transport upon departure, summer season 2010 (in thousands).

	2007	2008	2010	% chg. 2009-2010	2010			
	Total	Total	Total		By road	By ferry	By air	By rail/bus
Overnight holiday visitors	1 960	2 069	2 350	14	1 019	495	786	51
Guest nights	16 090	16 509	18 491	12	5 672	5 538	6 987	294
Average length of stay in nights	8,2	8,0	7,9	-1	5,6	11,2	8,9	5,8

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The most common form of overnight accommodation for holiday visitors was staying with friends or relatives, which comprised 26 per cent of all guest nights. Camping, either in camping cabins, tents, motor homes, or in caravans – on or off commercial camping grounds – was the second most used form of accommodation. This category accounted for 25 per cent of overnight stays. Another 23 per cent of guest nights were spent in hotels or guest/boarding houses, which is a slightly higher share than in 2009 (22 per cent).

Business and official travel

Business traffic measured by the number of arrivals grew again by 12 per cent in the summer of 2010 following a sharp drop the year before. The average length of stay in Norway decreased from 5.9 nights to 5.5 nights. In sum, this resulted in 2.5 million business-related guest nights, which were 170,000 more nights than during the previous summer.

Aeroplanes are still the dominant means of transport for business travellers from abroad, representing 70 per cent of guest nights spent. About 40 per cent of overnight stays were made in hotels, guest/boarding houses, etc., which is around six percentage points higher than in 2009.

Other

Around 18 per cent of the overnight visitors interviewed in the summer stated their travel purpose as visiting friends, while nine per cent were visiting relatives. About half of the respondents stated they were on some other form of holiday travel. Three per cent indicated that they were visiting a seminar, business course, or conference, while one per cent were on a congress or meeting, and eight per cent on some other form of business travel.

There are certain differences with respect to travel companions, depending on whether the trip is made for holiday or business purposes. About two out of three summer holiday visitors travel with their spouse or domestic partner, while only one out of five business travellers do so. The latter usually travel with colleagues or friends, something which this applies to only 18 per cent of the holiday visitors.

The car tourists were generally quite pleased with the road and driving conditions, as judged by those aspects which were included in the summer season survey. In general about half of the tourists evaluate these conditions to be either very good or quite good, and only 10-20 per cent consider conditions to be bad or very bad. It is the aspect "access to resting areas" that received the best evaluations, while "road surface standard" received the least positive evaluations.

Several indicators seem compatible with a favourable assessment of Norway as a travel destination. Relatively high visiting frequency and many return visitors, generally positive evaluations of the stay, and positive evaluations of road and driving conditions both summer and winter, are in sum favourable feedback messages from the visitors.