

Summary:

Norwegian Foreign Visitor Survey 2011

TØI Report 1166/2011

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Oslo 2011, 67 pages Norwegian language*

In 2011 a total of 5.0 million foreign guests stayed overnight in Norway, while 1.3 million were on a day trip from abroad. In addition, 457,000 cruise passengers came to Norway, which is more than ever. The number of overnight business visitors increased by three per cent, while the number of holiday visitors showed a four per cent increase from 2010 to 2011. Foreign overnight visitors spent a total of 32.6 million guest nights in Norway in 2011, four per cent more than in 2010. The most important source markets for overnight visitors are Germany, Sweden and Denmark. Arrivals from Germany went down two per cent and from Denmark one per cent. However, most other markets increased, so the total for all nationalities went up four per cent. About one out of four guest nights is spent with relatives or friends, and an almost equal share at hotels or boarding/guest houses. Camping sites and cabins are also widely used as accommodation.

The 2011 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 2011 the survey covers all travel out of the country by ferry, aeroplane, train, car, and chartered or scheduled bus or coach. Only those journeys made by foreign residents commuting to Norway are excluded, because such travel is not defined as international *tourism* (United Nations World Tourism Organisation, 1994). An overview of cruise ship traffic is also provided.

The year 2011

In 2011 the calculated total number of arrivals in Norway from abroad was just below 6.7 million (table A). This number includes around 5.0 million guests who spent at least one night in Norway, 1.3 million guests on day trips, and 457,000 cruise passengers who visited one or more Norwegian ports.

Of those who stayed overnight in Norway about 1.1 million were on business trips and 3.9 million on holiday trips. Overnight visitors spent a total of 32.6 million guest nights in Norway - a four per cent increase from 2010. Business travellers accounted for 5.3 million of those guest nights, and holiday tourists for 27.3 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).

Table A: Foreign business and holiday travel in Norway 2011 (in thousands). Border registration upon departure from Norway.

	Total	By road	By ferry	Cruise	By air	By rail/bus
Arrivals in total	6 693	2 780	1 042	457	2 281	133
- Day trips	1 273	901	215		145	12
- Cruise passengers	457			457		
- Overnight stays	4 963	1 879	827		2 137	121
-- business trips	1 096	217	73		785	22
-- holiday trips	3 867	1 662	754		1 352	99
Guest nights in total	32 596	9 802	7 524		14 662	608
- business trips	5 290	948	499		3 728	115
- holiday trips	27 306	8 854	7 025		10 934	493
Number of motor vehicles	1 249	1 034	215			
Private cars	1 146	946	200			
Camper cars/motor homes	68	60	8			
Private cars with caravans	18	14	4			
Busses/coaches	17	14	3			

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

It is the *holiday and leisure* travel segment that shows the biggest increase in the period 2006-2011 (figure A). The growth in the holiday traffic has continued through 2011 both measured by the number of arrivals, which increased by four percent, and by the number of guest nights, which increased by five percent from 2010 to 2011. The growth in 2010 was, however, much stronger than in 2011. During the last three years the growth in the holiday traffic, as measured in arrivals, has been considerable.

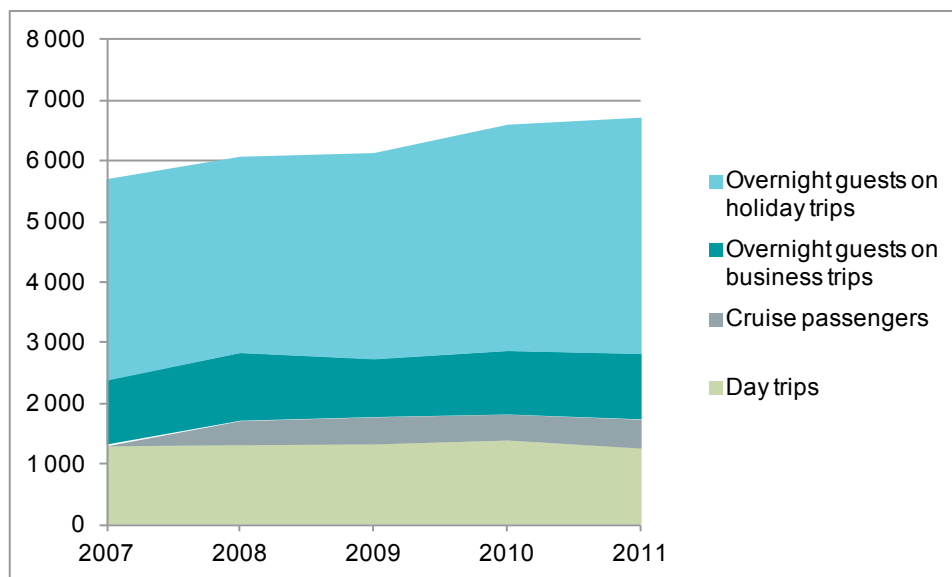


Figure A: Foreign business and holiday travel in Norway 2007-2011(1000 arrivals) by type of travel.

Among the larger markets the growth has been strongest in the number of arriving Swedes and Germans, but also for Russians and other European markets including visitors from the Baltic States and several countries outside of Europe.

German holiday guests accounted for 23 per cent of all foreign guest nights in Norway in 2011, while Swedish and Danish guests accounted for 15 and 10 per cent accordingly. Visitors from the USA accounted for five per cent of foreign holiday guest nights, the same share as visitors from Great Britain.

On an annual basis, 30 per cent of the guest nights by holiday visitors were spent at the homes of relatives or friends, 20 per cent at camping sites (including camping outside regulated campgrounds), 21 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 continued to grow in 2011. Approximately 68,000 foreign motor homes visited Norway in 2011, and visitors travelling in these vehicles spent a total of 2.3 million guest nights in the country. Those are the highest numbers ever recorded for motor homes in Norway. It is also calculated that 17,700 foreign cars towing caravans/campers visited Norway in 2011, which is about 3,300 fewer than the year before. The number of foreign scheduled buses or coaches visiting Norway was 17,500 in 2010, which is equal to the earlier top recording in 2008. The bus passengers generated just over 2.4 million guest nights altogether. However, there is considerable uncertainty concerning this number, since it is based on relatively few observations.

Foreign *business travel* to Norway increased by three per cent measured by number of arrivals, but shorter average stay resulted in just a one per cent increase in guest nights for business visitors compared to 2010. Sweden is clearly the most important market, followed by Great Britain, Germany, Denmark and Poland, measured in business travel guest nights. 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 or business partner.

Around 1.27 million *day visitors* visited Norway in 2011, which is about nine per cent less than the year before. *The cruise ship traffic* has increased considerably over the last few years. After a small decline in the number of foreign cruise passengers who have had one or more visits in Norwegian ports in 2010, the number rose again to 457,000 in 2011. This is 27,000 more compared to the previous top year 2009 (430,000). The number of cruise ship visits in Norwegian harbours in 2011 is the largest ever recorded with 1,679 ships. The largest absolute growth came from British cruise passengers (14,000 more) and German cruise passengers (9,000 more). German passengers represent the biggest market, and accounted for 33 per cent of all foreign cruise passengers in Norwegian ports.

Winter season

About 1.5 million foreign guests came to Norway during the winter season. About 1.2 million of those spent at least one night in Norway during the first four months of 2011, an increase of five per cent in relation to the year before, and the highest number ever recorded. The number of guest nights grew by four per cent from the

preceding year. Table B shows some key figures for the winter season visitor travel during the period from 2007 through 2011.

Table B: Foreign business and holiday travel in Norway, winter seasons 2007-2011 (in thousands). Border registration upon departure from Norway

	2007	2008	2009	2010	2011	Change in per cent 2010-2011
Arrivals in total	1 416	1 515	1 456	1 472	1 524	4
- Day trips	360	383	365	358	355	-1
- Overnight stays	1 056	1 131	1 091	1 114	1 169	5
-- business trips	307	337	294	327	349	7
-- holiday trips	749	794	797	787	820	4
Guest nights in total	5 769	6 044	6 060	6 232	6 480	4
- business trips	1 285	1 398	1 302	1 506	1 570	4
- holiday trips	4 484	4 646	4 758	4 726	4 910	4

The number of overnight guests on holiday was four per cent higher than in 2010, while the increase by seven per cent for business travellers was the most noticeable development. Business travellers, however, only accounted for 29 per cent of all arrivals during the 2011 winter season, about the same as the year before.

Figure B displays the share of overnight guests distributed by nationalities.

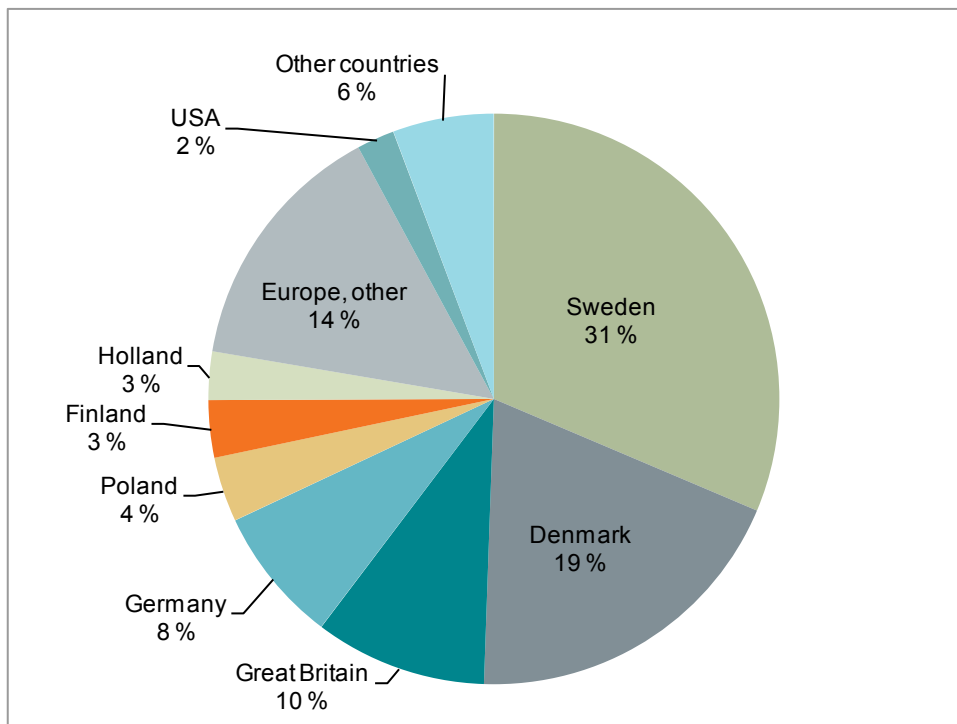


Figure B: Foreign overnight visitors in Norway by country of residence. Winter season 2011. Percentage share.

The Swedes represented 31 per cent of foreign visitors to Norway during the winter season 2011. Along with the Danes (19 per cent) visitors from those two countries accounted for about half of the foreign visitors in Norway in the winter season.

Both the number of overnight holiday visitors and the number of guest nights grew by four per cent from the winter season in 2010. 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).

Table C: Foreign holiday travel in Norway winter seasons 2009-2011 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

	Number of arrivals				Number of guest nights			
	2009	2010	2011	Change in per cent 2010-2011	2009	2010	2011	Change in per cent 2010-2011
Total	797	787	820	4	4 758	4 726	4 910	4
Sweden	267	261	271	4	1 273	1 139	1 198	5
Denmark	206	193	188	-3	1 243	1 135	1 092	-4
Finland	16	18	21	16	65	68	77	13
Great Britain	64	63	64	3	369	406	376	-7
The Netherlands	17	16	21	27	113	103	123	21
Germany	61	69	63	-9	502	564	487	-14
Poland	37	35	32	-9	292	332	290	-13
Other Europe	86	91	110	21	559	564	753	34
USA	11	10	12	23	92	97	121	25
Other countries	32	31	38	23	250	318	393	24

It is first and foremost Dutch, Finnish and holiday guest from the USA who led the relative growth in the number of holiday guest nights. Regarding the two main markets Sweden and Denmark, the Swedes' number of guest nights grew by five per cent, while the Danes' declined by four per cent in 2011. The number of Dutch guest nights rose by 21 percent, while the number of German guest nights fell by 14 per cent. There was also a relative increase in guest nights from visitors from the USA and from other countries than those specified in the table.

Summer season

Excluding cruise passengers, a total of 3.9 million foreign visitors came to Norway in the summer of 2011. That is about the same as the previous year. Close to 2.9 million foreign guests spent one or more nights in the country, corresponding to around 22 million guest nights. That is about 0.5 million more guest nights than in 2010 (two per cent more).

For the most part the increase comes from increased holiday travel. About 84 per cent of overnight guests were on holiday trips, the remaining 16 per cent were on business trips. Holiday guests accounted for 89 per cent of the total number of

guest nights in the summer season, a slightly higher share than in the previous year (87 per cent).

Table D depicts the main features of foreign guest travel to Norway in the summer season May - September 2011.

Table D: Foreign business and holiday travel in Norway, summer seasons 2007-2011 (in thousands). Border registration upon departure from Norway.

	2007	2008	2009	2010	2011	Change in per cent 2010-2011
Arrivals in total	3167	3079	3 559	3 918	3 928	0
- Day trips	629	626	648	696	580	-17
- Cruise passengers*	332	381	430	411	457	11
- Overnight stays	2 539	2 453	2 481	2 811	2 891	3
-- business trips	454	494	413	462	451	-2
-- holiday trips	2 085	1 960	2 069	2 350	2 440	4
Guest-nights in total	19 728	18 943	18 869	21 021	21 542	2
- business trips	2 468	2 853	2 360	2 530	2 315	-8
- holiday trips	17 260	16 090	16 509	18 491	19 227	4
Number of motor vehicles						
Private cars	575	544	604	633	624	-1
Camper cars/motor homes	48	52	52	56	65	17
Private cars with caravans	21	21	19	20	17	-16
Busses/coaches	7	11	9	11	10	-6

*The number of cruise passengers include passengers who have visited one or more Norwegian ports. All cruise visits are assumed to have taken place in the summer season.

Of those making overnight stays, about 40 per cent arrived by road and about an equal share by aeroplane. The other main means of arrival were by ferry (19 per cent) and train/coach (two per cent).

The number of guests staying overnight increased by three per cent, and the total number of nights spent grew by two percent from the previous summer. The growth was, however, slower than the year before (13 and 11 per cent accordingly). The average stay was 7.4 nights, which is slightly shorter (0.1 nights) than in 2010.

Most of the overnight guests came from Sweden, Germany, Denmark and Finland. The number of overnight guests from Finland grew substantially (18 percent) compared to the previous summer, while most of the other main markets had minor declines.

The Germans had about the same number of guest nights as the previous summer (one per cent increase) in spite of fewer German arrivals. The number of Danish guest nights decreased by four per cent, and the Swedish total decreased by two per cent. Germans accounted for 26 per cent of the total number of foreign guest nights during the summer of 2011 (figure C). The most noticeable growth came from visitors from Italy, Switzerland Finland and Russia, while there were fewer French car tourists in particular compared to the summer of 2010 (table E). For other nationalities the changes were relatively minor.

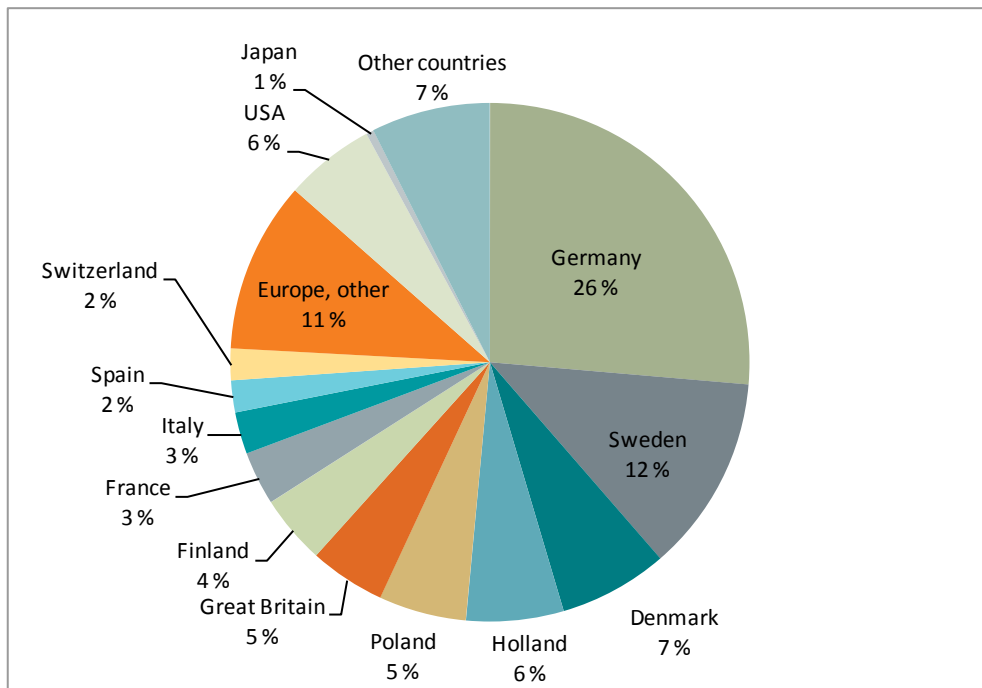


Figure C: Foreign guest nights in Norway by country of residence, summer season 2011 (percentage share).

Table E: Foreign guest nights in Norway by country of residence, summer seasons 2008–2011, and by mode of transport upon departure, summer season 2011 (thousands).

	2008	2009	2010	2011	% chg. 2010-11	Avg. # nights	2011		
							By road	By ferry	By air
Total	18 943	18869	21 021	21 542	2	7,5	6 819	5 619	8 755
Sweden	2 387	2 595	2 648	2 641	-2	4,2	1 932	45	486
Denmark	1 509	1 405	1 526	1 464	-4	6,5	315	669	466
Finland	731	729	781	926	19	4,1	825	1	100
Gr. Britain	1 163	933	963	1 016	6	7,5	47	157	799
Netherlands	1 570	1 386	1 308	1 306	0	9,1	466	411	422
Belgium	227	190	247	248		8,3	59	36	147
France	791	796	818	718	-12	7,8	81	25	605
Germany	4 386	4 389	5 599	5 680	1	10,2	1 169	3 443	1 043
Italy	307	339	381	561	47	8,9	272	23	255
Switzerland	210	254	313	427	36	10,2	191	30	194
Austria	151	182	199	205	3	8,5	79	13	107
Spain	427	388	398	429	8	9,1	19	4	398
Poland	1 263	942	1 094	1 174	7	10,8	533	32	607
Russia	285	282	371	420	13	8,2	274	0	144
Other Europe	1 294	1 257	1 456	1 421	-2	7,1	541	320	554
USA	1 013	1 043	1 220	1 207	-1	10,5	0	11	1 179
Japan	109	103	102	104	2	5,0	0	0	102
Other countries	1 140	1 686	1 597	1 595	0	9,0	16	399	1 147

Germany is clearly the largest single market in terms of the total number of guest nights. With almost 5.7 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.

The distribution of guest nights on different types of accommodations is quite stable over time, with only minor changes from one year to another. Overnight stays with friends or relatives represent one out of four guest nights spent in Norway, while stays in hotels and guest houses represent about an equal share. About 24 per cent of nights were spent camping at or outside of commercial camping sites. Rented, borrowed, or owned cabins were used for 18 per cent of guest nights.

It is also worth noticing that approximately 50 per cent of the guest nights are spent in other forms of accommodations than what is covered by Statistics Norway's (Statistisk sentralbyrå) commercial accommodation statistics.

Foreign visitors spent on average about 37 per cent of their guest nights in South Eastern Norway (Østlandet). Western Norway had 28 per cent of foreign guest nights, while Northern Norway had 14 percent. Mid-Norway (Trøndelag) and South West Norway (Sørlandet) had 11 and 10 per cent respectively.

During the summer of 2010, around 2.4 million foreign overnight guests arrived in Norway on holiday trips (Table F).

Table F: Number of arrivals and guest nights for foreign holiday visitors with at least one overnight in Norway, summer seasons 2009–2011, by mode of transport upon departure, summer season 2011 (in thousands).

	2008	2009	2011	% chg. 2010-2011	2011			By rail/bus
	Total	Total	Total		By road	By ferry	By air	
Overnight holiday visitors	2 069	2 350	2 440	4	1 056	509	823	53
Guest nights	16 509	18 491	19 227	4	6 308	5 385	7 226	308
Average length of stay in nights	8,0	7,9	7,9	0	6,0	10,6	8,8	5,8

Around 85 per cent of overnight visitors reported being on a holiday or leisure trip; and they represented 90 per cent of all foreign guest nights spent in the country in the summer. Norway is thus first and foremost a *holiday* destination when it comes to foreign visitors. Among the holiday guests 22 percent reported that they were visiting family, while 14 percent were visiting friends.

During the summer of 2011 over half a million Swedes arrived in Norway on a holiday or leisure visit, and almost the same number of Germans. About 186,000 Danish and 231,000 Finns came for overnight holiday/leisure stays. Most of them came by car or other motor vehicle through the road border crossings or by ferry. Tourists from more distant countries, such as the USA, Japan or from Southern Europe arrived mainly by airplane.

German visitors accounted for what was decidedly the largest proportion of foreign guest nights (28 per cent) in the summer of 2011, which was more than all Swedish, Danish and Finnish guest nights combined.

Regarding the nationalities with the biggest relative growth in guest nights, visitors from Italy, Switzerland, Poland and Finland headed the growth. Relatively big markets like France and Denmark showed a noticeable decline. Summer visitors from the Netherlands have also become fewer the last couple of years.

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 guest nights, while cabins (own, rented or borrowed – off campgrounds) represented 18 per cent. Another 22 per cent of guest nights were spent in hotels or guest/boarding houses, which is a slightly lower share than in 2010 (23 per cent).

Summer season business travel to Norway declined compared to the summer the year before. Business traffic measured by the number of arrivals dropped by two per cent in the summer of 2011, and the number of guest nights dropped by eight per cent. Business travellers arriving by air are dominating the market, and it was in this segment the decline was most noticeable, resulting in fewer guest nights in total.

Although there were fewer Swedish business visitors who came to Norway during the summer season in 2011 than in 2010, Sweden still constitutes the most important incoming business travel market. Germany, Great Britain and Denmark are also important business travel markets. However, only Denmark, Finland and some countries outside of Europe had an increase in summer business guest nights in 2011. It was a clear tendency of shorter average stays, resulting in fewer guest nights overall.

Around 19 per cent of the overnight visitors interviewed in the summer stated their travel purpose as visiting friends, while 11 per cent were visiting relatives. About half of the respondents (54 per cent) 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.

Approximately one third (32 per cent) of the interviewed overnight visitors who visited Norway in the summer season 2011 stated that they were in Norway for the first time. One out of five (20 per cent) had been between one and three times in Norway before, while almost half had been in Norway more than three times.

Almost 40 per cent stated that they intended to visit Norway again within one year, and another 30 per cent intended to return within one to three years. About 23 per cent stated that they did not know if they would return, while only four per cent had no intention to come back to Norway.

Just above half of the overnight visitors had visited Oslo, 28 per cent had visited Bergen, 18 per cent Trondheim, 15 per cent Kristiansand/Arendal, 11 per cent Stavanger/Sandnes, and nine per cent Tromsø. Other important destinations are the fjords on the West Coast, i.e. Sognefjord, Hardangerfjord, and Geiranger/Trollstigen (12-18 per cent). 15 per cent had visited Lillehammer, while 10 per cent had visited Bodø/Fauske, Lofoten or North Cape in Northern Norway.

Regarding information sources important for the decision to travel to Norway, traditional sources like information from family or friends or own travel experience are still the most important. Guide books are also quite important to many, as well as coverage in TV, printed press, or magazines. Information through various Internet pages (like home pages of tour operators, transport companies, accommodations, or tourist organisations) seems to have less importance. Social media, like Facebook or Internet blogs, appear to have little importance on the decision to travel to Norway for most visitors.

Although electronic and social media appear to have somewhat more importance for first time visitors than for visitors who have visited Norway previously, the same tendency as for all visitors is still apparent for first timers: Traditional information sources still have the greatest importance for the decision to travel to Norway in the summer season.

On average the decision to travel to Norway was taken about six months prior to the trip for summer overnight visitors. There is considerable variation among travellers about when the decision was taken, especially among different nationalities or for different purposes of travel. As much as 75 per cent had not considered any other alternative destinations but Norway.

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 60 of the tourists evaluate these conditions to be either very good or quite good, and only around 10 per cent consider conditions to be bad or very bad. Almost half of the car tourists had heard of any of the National tourist routes, and 43 per cent reported having driven on at least one of them.

Scientific research results based on data from the Norwegian Foreign Visitor Survey show that there are, among other things, significant differences between nationalities with respect to monetary expenditure, length of stay, and decision timing related to visits in Norway.