

Summary:

Norwegian Travel Survey for Foreigners 2012

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In 2012 a total of about 5.2 million foreign guests stayed overnight in Norway, while 1.3 million were on a day trip from abroad. In addition, 580,000 cruise passengers came to Norway, which is more than ever. The number of overnight business visitors increased by six per cent, while the number of holiday visitors showed a three per cent increase from 2011 to 2012. Foreign overnight visitors spent a total of 33.7 million guest nights in Norway in 2012, three per cent more than in 2011. The most important source markets for overnight visitors are Germany, Sweden, and Denmark. Arrivals of overnight visitors from Sweden increased by five per cent, from Denmark by eight per cent, while the number of German visitors stayed about the same as in 2011. Most other markets also increased, so the arrivals total for all nationalities went up four per cent, and guest nights by three per cent. There was a growth in guest nights in both the winter and summer seasons 2012, by five and two per cent accordingly.

The 2012 Norwegian Travel Survey for Foreigners 2012 is a simplified version of the earlier Norwegian Foreign Visitor Survey (“Gjesteundersøkelsen”). It 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 2012 the survey covered 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 the cruise ship traffic is also provided.

Due to reduced financing of the survey in 2012, it was not possible to conduct interviews with foreign travellers on the various transport modes in the manner it has been done in previous years. Due to lack of interview data from 2012, it has been necessary to use such data from the Norwegian Foreign Visitor Survey 2011 (summer and autumn) and 2010 (winter) to calculate key background variables such as purpose of travel, length of stay, nationality distribution, etc. where such data are missing for 2012. Therefore, the results presented in this report have higher level of uncertainty than previous years’ published survey results.

The year 2012

In 2012 the calculated total number of arrivals in Norway from abroad was just above 7.0 million (table A). This number includes around 5.2 million guests who spent at least one night in Norway, 1.3 million guests on day trips, and 588,000 cruise passengers who visited one or more Norwegian ports.

Of those who stayed overnight in Norway about 1.2 million were on business trips and 4.0 million on holiday trips. Overnight visitors spent a total of 33.7 million guest nights in Norway - a four per cent increase from 2011. Business travellers accounted for 5.6 million of those guest nights, and holiday tourists for 28.0 million. The business traffic was relatively evenly distributed over the year, while about 70 per cent of holiday guest nights took place during the summer season (May-September).

Table A: Foreign business and holiday travel in Norway 2012 (in thousands). Border registration upon departure from Norway.

	Total	By road	By ferry	Cruise	By air	By rail/bus
Arrivals in total	7 021	2 859	1 002	588	2 439	133
- Day trips	1 278	882	226		158	11
- Cruise passengers	588			588		
- Overnight stays	5 155	1 977	776		2 281	122
-- business trips	1 157	227	66		841	23
-- holiday trips	3 998	1 750	710		1 440	99
Guest nights in total	33 654	10 271	6 950		15 824	609
- business trips	5 637	975	446		4 097	119
- holiday trips	28 017	9 296	6 504		11 727	490
Number of motor vehicles	1 262	1 067	195			
Private cars	1 156	974	182			
Camper cars/motor homes	70	63	7			
Private cars with caravans	18	15	3			
Busses/coaches	18	15	3			

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

In the time period from 2007 to 2012 the increase in overnight guests has been the greatest for travellers coming by road or by airplane, while fewer came by ferry (figure A). The number of overnight visitors who arrived by plane has increased by seven per cent in 2012. Arrivals by road have also had a stable growth; and the number grew by five per cent from 2011 to 2012.

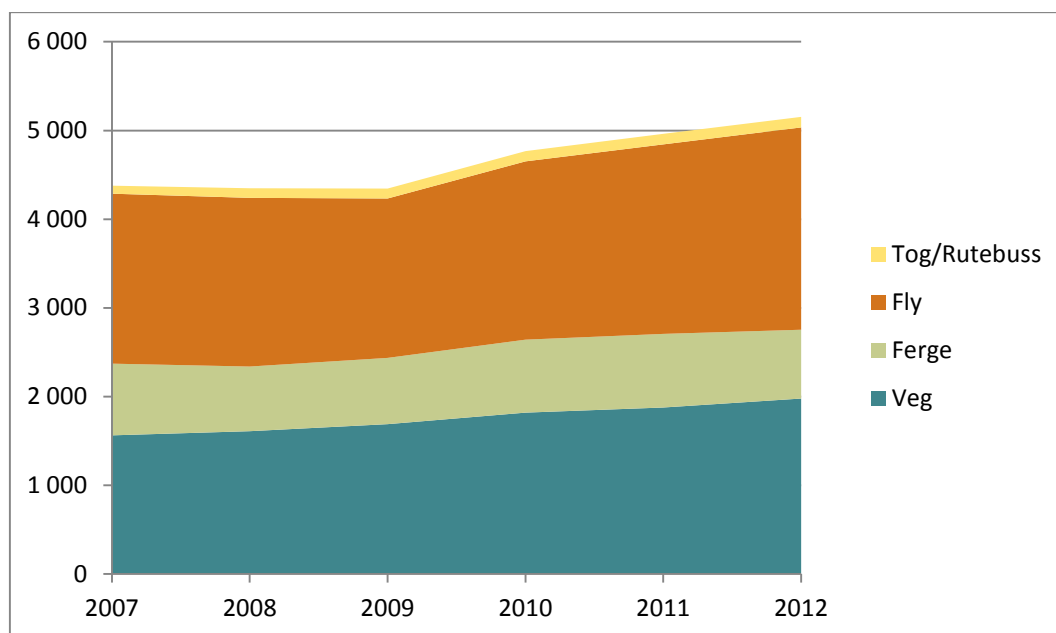


Figure A: Foreign business and holiday travel in Norway 2007- 2012 (thousand arrivals) by mode of transport for overnight visitors. (From top to bottom graph area: Train and scheduled bus, airplane, ferry and road traffic).

In 2012 it was the markets in the Nordic countries, Great Britain, Austria and Russia, where in the number of arriving visitors grew the most. Japan, France and Belgium are among the few markets that showed a decrease in 2012.

German holiday guests accounted for 22 per cent of all foreign guest nights in Norway in 2012, while Swedish and Danish guests accounted for 16 and 10 per cent accordingly. Holiday visitors from the Poland accounted for six per cent of foreign holiday guest nights, while visitors from Great Britain, the Netherlands, and the USA had five per cent each.

On an annual basis, around 30 per cent of the holiday guest nights were spent at the homes of relatives or friends, about 20 per cent at camping sites (including camping outside regulated campgrounds), 20 per cent at hotels or guest/boarding houses, and 20 per cent in either rented, borrowed or owned cabins.

The number of foreign motor homes continued to grow in 2012. Approximately 70,000 foreign motor homes visited Norway in 2012, and visitors travelling in these vehicles spent a total of 2.4 million guest nights in the country. Those are the highest numbers ever recorded for foreign motor homes in Norway. It is also calculated that 17,900 foreign cars towing caravans/campers visited Norway in 2012, which is a few hundred more than the year before. The number of foreign scheduled buses or coaches visiting Norway was 17,900 in 2012, which was slightly higher than the earlier top recording in 2011. The bus passengers generated just over 2.4 million guest nights altogether.

About 1.2 million *foreign business travellers* came to Norway in 2012, who spent 5.6 million guest nights in all in the country. Foreign business travel to Norway increased by six per cent measured by number of arrivals; and there was a seven per cent increase in guest nights for business visitors compared to 2011. Sweden is clearly the most important market (about one million guest nights), followed by Great Britain, Germany, Denmark and Poland (about 0.5 million) 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/client.

Around 1.28 million *day visitors* visited Norway in 2012, which is one per cent more than the year before. *The cruise ship traffic* has increased considerably over the last few years, and especially in 2012. The number of foreign cruise passengers (i.e., who have had one or more visits in Norwegian ports in 2012) rose again to 588,000 in 2012. This is 130,000 more passengers compared to the previous top year 2011. The number of cruise ship visits in Norwegian harbours in 2012 was the largest ever recorded with 2,064 ships. German and British passengers represent the biggest markets. Both Germany, Great Britain, USA and Spain were source markets with considerable growth in incoming cruise passengers.

Winter season

About 1.6 million foreign guests came to Norway during the winter season 2012. About 1.2 million of those spent at least one night in Norway during the first four months of 2012; an increase of six per cent in relation to the year before, and the highest number ever recorded. The number of guest nights grew by five percent from the preceding year. Table B shows some key figures for the winter season visitor travel during the period from 2008 through 2012.

The growth in the number of winter arrivals from 2008 to 2012 was seven percent, and the number of guest nights grew by 13 percent in the same time period; despite a decline during (the financial crisis in) 2009 and 2010 compared to the 2008-level.

Table B: Foreign business and holiday travel in Norway, winter seasons 2008-2012 (in thousands). Border registration upon departure from Norway

	2008	2009	2010	2011	2012	Change in % 2011 – 2012
Arrivals in total	1 515	1 456	1 472	1 524	1 622	4
- Day trips	383	365	358	355	383	8
- Overnight stays	1 131	1 091	1 114	1 169	1 240	6
-- business trips	337	294	327	349	344	-1
-- holiday trips	794	797	787	820	895	9
Guest nights in total	6 044	6 060	6 232	6 480	6 822	5
- business trips	1 398	1 302	1 506	1 570	1 558	-1
- holiday trips	4 646	4 758	4 726	4 910	5 264	7

The number of overnight guests on holiday was nine per cent higher than in 2011, while there was a slight decrease of one per cent for business travellers. Holiday travellers accounted for 72 per cent of all arrivals during the 2012 winter season, one percentage point above the year before.

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

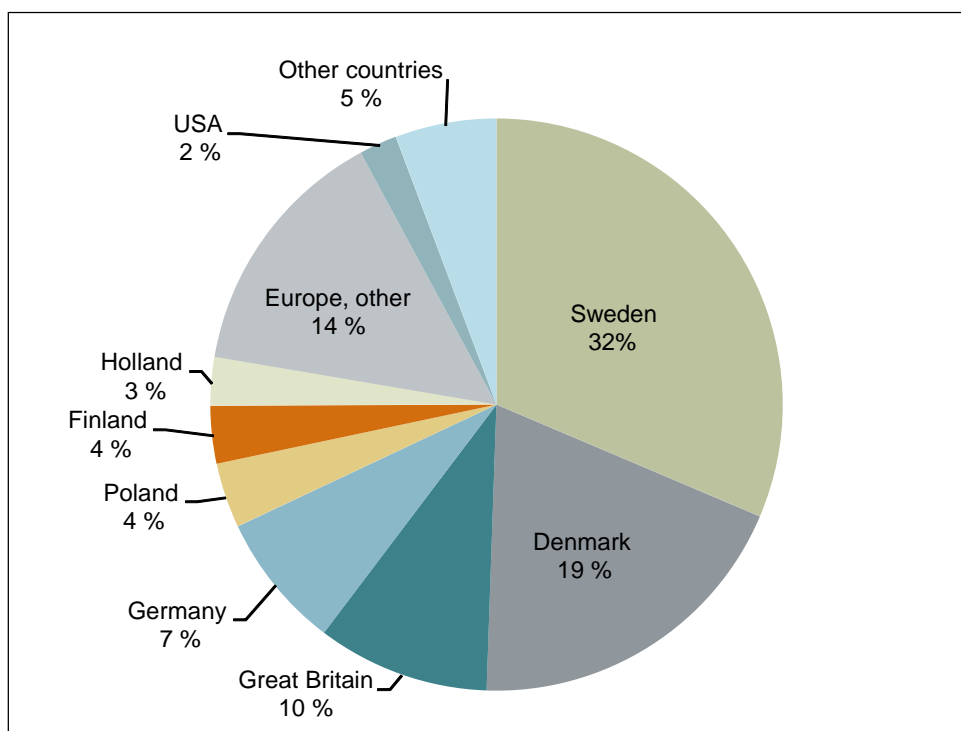


Figure B: Foreign overnight visitors in Norway by country of residence. Winter season 2012. Percentage share.

The Swedes represented 32 per cent of foreign visitors to Norway during the winter season 2012. 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. The Finns only represent a small share of four per cent overnight visitors in the winter season.

The British also are important (10 per cent of visitors) in terms of the share of overnight visitors, and were more than the Germans (seven per cent) and the Dutch (three per cent) in total. Visitors from Poland represented four per cent, and those from other European countries 14 per cent altogether.

Both the number of overnight holiday visitors and the number of guest nights grew compared to the winter season 2011, i.e. by nine and seven per cent accordingly. 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 2010-2012 by country of residence. Number of arrivals and guest nights for overnight guests (in thousands)

	Number of arrivals				Number of guest nights			
	2010	2011	2012	Change in % 2011-2012	2010	2011	2012	Change in % 2011 - 2012
Total	787	820	895	9	4 726	4 910	5 264	7
Sweden	261	271	294	9	1 139	1 198	1 293	8
Denmark	193	188	198	5	1 135	1 092	1 159	6
Finland	18	21	26	27	68	77	104	35
Great Britain	63	64	72	12	406	376	426	13
Netherlands	16	21	25	20	103	123	152	24
Germany	69	63	67	6	564	487	510	5
Poland	35	32	33	3	332	290	274	-6
Other Europe	91	110	126	14	564	753	798	6
USA	10	12	15	20	97	121	137	13
Other countries	31	38	40	4	318	393	411	5

It was first and foremost the Dutch, Finns, Britons and holiday guest from the USA who led the relative growth in the number of holiday guest nights. Regarding the two main markets, the Swedes' number of guest nights grew by nine per cent, while the Danes' went up four per cent in 2012. The number of Dutch guest nights rose by 24 percent, while the number of German guest nights rose by five 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. Polish guest nights, however, fell by six percent.

Summer season

Table D depicts the main features of foreign guest travel to Norway in the summer season May - September 2012.

Including cruise passengers and day visitors, a total of 4.1 million foreign visitors came to Norway in the summer of 2012. That is four per cent more than the previous year. Close to 3.0 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 2011 (two per cent more).

For the most part, the increase in visitor totals came from increased holiday travel. About 83 per cent of overnight guests were on holiday trips, the remaining 16 per cent were on business trips. It was business-related travel that increased relatively most in the summer of 2012, with 10 per cent more arrivals and 16 per cent more guest nights compared to the summer of 2011. Although business travel increased the most, the holiday traffic is still dominating incoming travel during the summer. Holiday guests accounted for 83 per cent of foreign arrivals and 88 per cent of the total number of foreign guest nights in the summer season.

Table D: Foreign business and holiday travel in Norway, summer seasons 2008-2012 (in thousands).
Border registration upon departure from Norway.

	2008	2009	2010	2011	2012	Change in % 2011– 2012
Arrivals in total	3079	3 559	3 918	3 928	4 080	4
- Day trips	626	648	696	580	532	-8
- Cruise passengers*	381	430	411	457	588	29
- Overnight stays	2 453	2 481	2 811	2 891	2 960	2
-- business trips	494	413	462	451	496	10
-- holiday trips	1 960	2 069	2 350	2 440	2 464	1
Guest-nights in total	18 943	18 869	21 021	21 542	21 955	2
- business trips	2 853	2 360	2 530	2 315	2 678	16
- holiday trips	16 090	16 509	18 491	19 227	19 277	0

*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 (17 per cent) and train/coach (two per cent).

The number of guests staying overnight increased by two per cent, and the total number of nights also grew by two percent from the previous summer. Most of the overnight guests came from Sweden, Germany, Denmark and Finland. The number of overnight guests from Denmark grew the most (nine percent more) compared to the previous summer. Most of the other main markets also had noticeable increases, while two per cent fewer Germans visited Norway during the summer of 2012.

From 2008 to 2012 the number of summer arrivals grew by a whole 33 percent, and the number of guest nights grew by 16 percent in the same time period.

Table E and Figure C show the distribution of guest nights by nationality, and percentage share of total number of guest nights.

All together the number of guest nights rose by two per cent from the summer of 2011 to the summer of 2012. Out of the 22.0 million guest nights spent in Norway by foreign visitors, the Germans still had the largest share with almost 5.6 million – in spite of a small decline in arrivals during the summer of 2012. The Germans had two per cent fewer guest nights in Norway, while the Swedes and Danes had seven and five per cent more accordingly.

The Swedes constitute the second largest market measured in guest nights during summer, but have still only half as many guest nights in the country as the Germans have. Visitors from Denmark, Finland, the Netherlands, Great Britain, Poland, and the USA also represent substantial guest night volumes in the summer season, with about one million guest nights in Norway for all of those nationalities.

Table E: Foreign guest nights in Norway by country of residence, summer seasons 2009–2012, and by mode of transport upon departure, summer season 2012 (thousands).

	2009	2010	2011	2012	% chg. 2011- 2012	Avg. no. of nights	2012		
							By road	By ferry	By air
Total	18 869	21 021	21 542	21 955	2	7.4	7 149	5 207	9 277
Sweden	2 595	2 648	2 641	2 821	7	4.2	2 040	48	579
Denmark	1 405	1 526	1 464	1 540	5	6.2	331	683	512
Finland	729	781	926	972	5	4.2	850	2	120
Gr. Britain	933	963	1 016	992	-2	6.5	49	133	799
Netherlands	1 386	1 308	1 306	1 310	0	8.8	490	390	422
Belgium	190	247	248	250	1	9.2	61	67	116
France	796	818	718	679	-5	7.8	83	43	546
Germany	4 389	5 599	5 680	5 566	-2	10.2	1 228	3 171	1 142
Italy	339	381	561	586	4	9.1	284	28	263
Switzerland	254	313	427	510	19	11.1	197	67	234
Austria	182	199	205	243	19	8.8	82	30	125
Spain	388	398	429	421	-2	9.4	19	9	386
Poland	942	1 094	1 174	1 287	10	11.1	558	66	661
Russia	282	371	420	420	0	7.9	293	0	125
Other Europe	1 257	1 456	1 421	1 449	1	7.2	569	202	664
USA	1 043	1 220	1 207	1 250	4	10.9	0	14	1 219
Japan	103	102	104	59	-43	5.4	0	0	57
Other countr.	1 686	1 597	1 595	1 600	0	8.9	15	254	1 307

The largest relative growth came for visitors from Switzerland, Austria, Poland and Italy, plus the Nordic countries, while noticeably fewer Japanese visitors came to Norway during the summer of 2012.

The Germans accounted for 25 per cent of the total number of foreign guest nights in Norway summer 2012 (figure C). The Swedes had 13 per cent of guest nights and the Danes seven per cent.

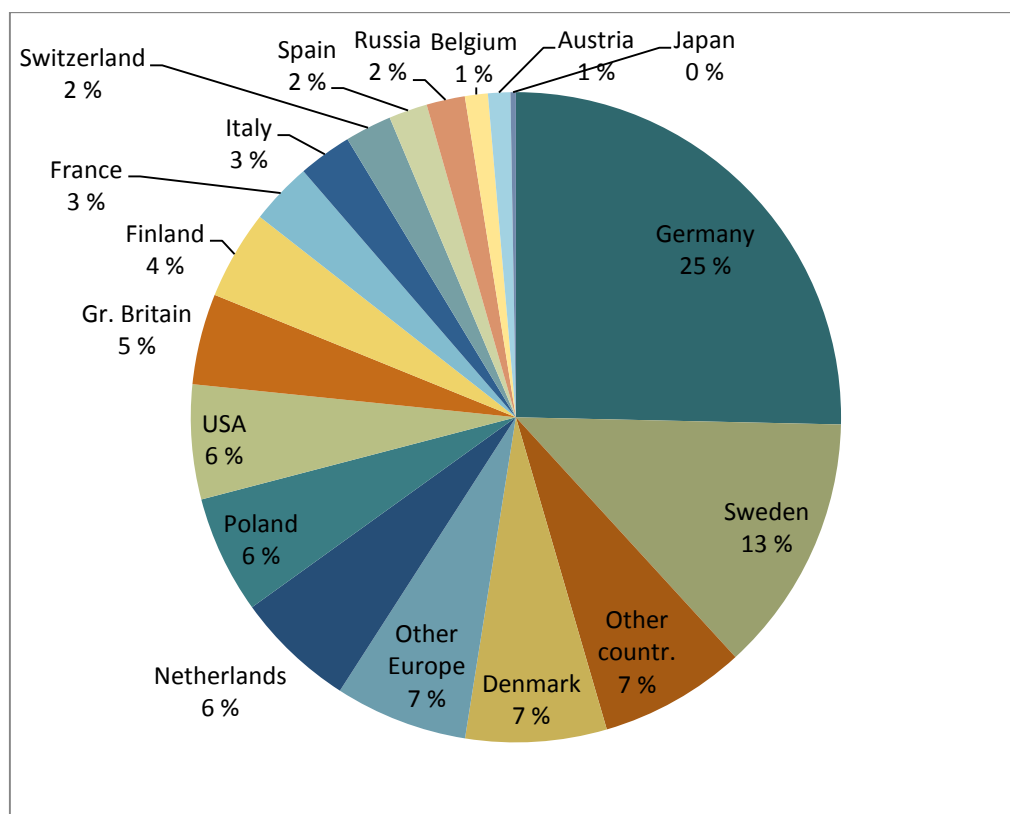


Figure C: Foreign guest nights in Norway by country of residence, summer season 2012 (percentage share).

During the summer of 2012, around 2.5 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 2010–2012, by mode of transport upon departure, summer season 2012 (in thousands).

	2010	2011	2012	% chg. 2011-'12	2012			
	Total	Total	Total		By road	By ferry	By air	By rail/bus
Overnight holiday visitors	2 350	2 440	2 464	1	1 109	468	838	49
Guest nights	18 491	19 227	19 277	0	6 617	4 987	7 388	285
Average length of stay in	7.9	7.9	7.4	-6	5.9	10.4	7.8	5.8

The number of holiday visits had a slight increase (one per cent), and the number of guest nights went up with about 50,000, which is marginally more than the summer of 2011. The incoming holiday traffic rose for both road and airborne tourists, while the ferry traffic showed a markable decrease.

During the summer of 2012 over half a million (553,000) Swedes arrived in Norway on a holiday or leisure visit, and almost the same number of Germans. About 198,000 Danish and 222,000 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.

With their 5.3 million guest nights German visitors accounted for what was definitely the largest proportion of all foreign guest nights (27 per cent) in the summer of 2012, which was more than all Swedish, Danish and Finnish guest nights combined. That is in spite of a decrease of three per cent in German holiday guest nights in Norway in the summer of 2012. Regarding the development otherwise, the relative growth was the strongest for the visitors from Switzerland, Austria, Poland and the Nordic countries. A few other markets, such as France, Belgium, Spain and Japan showed a decrease from the summer of 2011 to the summer of 2012.

Summer season business travel to Norway increased again compared to the summer the year before, when there was a decline in the amount of incoming business visitors. Business traffic measured by the number of arrivals went up 10 per cent in the summer of 2012, and the number of guest nights with 16 per cent. Business travellers arriving by air are dominating the market, and it was in this segment the increase was most noticeable. All together there were almost one half million trips to Norway by foreign visitors. Average length of stay for business visitors was 5.4 days, and the number of foreign business guest nights totalled 2.7 million in the summer of 2012.

Sweden constitutes the most important incoming business travel market. The Swedes' 434,000 business guest nights constituted 16 per cent of all occupational guest nights spent Norway. Germany, Great Britain and Denmark, and Poland are also important business travel markets. There was an increase in summer business guest nights in 2012 for most countries, except some countries outside of Europe, and in particular for Japan.

Autumn season

It is calculated that more than 1.3 million foreign visitors arrived Norway during the autumn season 2012. That is an increase of six percent for the previous autumn. About 363,000 of those were one-day visitors, while the remaining 956,000 visitors spent at least one night in Norway while here. Among the overnight visitors, about one-third were on a business or occupational trip, while the remaining visitors were visiting for holiday or leisure purposes. The relative share of business arrivals is higher during the autumn season compared to the winter or summer seasons.

A total of almost five million guest nights were spent in Norway by foreign visitors in the autumn of 2012, of which approximately 1.4 million were business guest nights and 3,5 million holiday/leisure guest nights. That is seven percent more guest nights in all than during the autumn of 2011.

The Swedes constitute by far the greatest autumn visitor market measured in arrivals (ca 350,000), and they constitute 37 per cent of all foreign visitors in the autumn. More than one million guest nights were spent by Swedes in Norway in the autumn. Apart from the Swedes, the Germans, Danes, Poles and Britons are among the largest single markets in the autumn, with about 0.6 million guest nights for the Germans, and 0.4 million each for the remaining three nationalities accordingly during the autumn of 2012.