
Summary:

International and domestic air travel in Norway 2015

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This report presents results from the 2015 Norwegian Air Travel Survey for Avinor's airports.

Information from 155 000 passengers was collected and analyzed. Results show that domestic leisure traffic increased by 5 percent while commuting by air was reduced by 11 percent from 2013 to 2015. 48 percent of domestic traffic is now related to work. On Avinor's international scheduled network foreigners increased their share of the traffic from 37 percent in 2013 to 44 percent in 2015. Work related traffic fell by 2 percent while leisure traffic increased by 18 percent. The leisure share increased from 66 to 70 percent. Foreigners made up 80 percent of the growth in leisure traffic, and increased their share of the leisure traffic from 30 percent in 2013 to 38 percent in 2015. SAS is the biggest operator in the domestic market, with a 47 percent market share. For travel between Norway and international destinations however, more passengers chose to fly with Norwegian than with SAS in 2015.

The survey also shows that the share of public transport in ground access increased to 71 percent for Oslo, 52 percent for Trondheim and 42 percent to Bergen.

About the survey

In the 2015 Air Travel Survey (RVU 2015), 155,000 passengers responded to questions about their travel. The survey covers all domestic air travel and all travel between Norway and international destinations, with the exception of traffic to/from Moss Airport Rygge and Sandefjord Airport Torp.

Domestic air traffic

In 2015, Norwegians made an average of 2.4 domestic air journeys like in 2013. As previously, it is the population of North Norway that travels most by air domestically, the population of Troms being the most frequent travelers with an average of 6.6 air journeys in 2015, up from 6.2 in 2013.

SAS is still the largest airline on the domestic network, with a market share of 47 percent. Norwegian has 35 percent of the market and Widerøe 18 percent. Traffic growth for Widerøe was 2.7 percent per year in the period 2013-2015. Corresponding figures for SAS and Norwegian was 1.7 and -2.4 percent respectively.

Altogether, domestic air travel grew by 0.8 percent per year from 2013 to 2015, which is significantly lower than the 3.2 percent annual growth in the 12-year period 2003-2015.

Travel for private purposes comprises 52 percent of domestic air travel in Norway, and 48 percent is business traffic. In the period 2003-2015 business travel grew at a rate of 2.4 percent per year and leisure travel at 4.0 percent.

The average fare for domestic journeys increased from NOK 2 000 in 2013 to NOK 2 120 in 2015. Business travelers paid an average fare of NOK 2 430, and leisure travelers paid NOK 1 850.

There is now direct competition on most of the major domestic routes. From Oslo Airport (OSL), the only main routes that do not have competition between the airlines are those to Kristiansund (operated by SAS) and Bardufoss (operated by Norwegian).

Air traffic between Norway and international destinations

International scheduled air traffic from Avinor's airports grew by as much as 5.5 percent annually between 2013 and 2015. This is far more than the growth in domestic travel. Leisure travel is the only driver of the growth in international traffic. In the period 2003-2015, the number of scheduled air leisure trips increased from 4.3 to 12.6 million. In the last two years, the number of leisure trips is up by almost 2 million. Business travel has grown at a significantly lower rate, up from 3.3 million journeys in 2003 to 5.35 million journeys in 2015. Leisure travel constitutes 70 percent of international scheduled air travel, compared to 55 percent in 2003. The growth in international traffic was until 2013 particularly driven by Norwegian leisure travelers. From 2013 to 2015, however, foreigners accounted for 82 percent of the growth in leisure traffic and 88 percent of the growth in total international scheduled traffic.

Norwegian is the largest operator with a market share of 36 percent in 2013. SAS had 26 percent of the market. Low-cost airline Wizz Air opened routes from Norway in 2009, and had a market share of 4 percent in 2015.

15 percent of the international scheduled traffic has an intercontinental destination. North America is still the most popular destination, and USA had the highest passenger growth in absolute figures. As previously, New York is the single most popular intercontinental destination. Seven of the top 15 intercontinental destinations are still in North America.

Fares to/from international destinations have generally been falling since 2003, but jumped in 2015, in particular for business trips. Until 2013 the relative price of leisure travel compared to business travel kept increasing. This changed in 2015, as the relative price of leisure travel to many destinations decreased.

Access to airports

The survey also shows that the share of public transport in ground access increased from 60 percent in 2007 to 66 percent in 2013 and 71 percent for Oslo Airport due to an increased share for rail traffic (42 percent in 2007, 49 percent in 2013 and 57 percent in 2015). For Trondheim the public transport share has increased from 43 percent in 2013 to 52 percent in 2015. For Bergen the share increased from 34 to 42 percent.