

## Summary

# Visitor Management and Local Community Development in the West Norwegian Fjords World Heritage Site

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*This reports estimates a total number of 920 000 visitors in Aurland/Flåm in 2015, including 182 000 cruise ship passengers. The estimate for the Geiranger area is 815 000 visitors, among them 315 000 cruise ship passengers.*

*The majority of the visitors are on a round trip travel, with relatively short stay in the respective areas. Nevertheless, approximately one third of the visitors to the Nærøysfjord area spend at least one night in Aurland municipality, while half the number of the Geiranger visitors spend at least one night in Stranda or Norddal municipalities.*

*75 percent of the domestic visitors and 60 percent of the foreign visitors were aware of the world heritage site status before the visit, however, relatively few state that the status was of significant importance for deciding to visit the areas.*

*Visitor expenditures in Aurland municipality are estimated to 470 million NOK in 2015, while the expenditures i Stranda and Norddal municipalities were estimated to 417 million NOK.*

Sustainable management of nature and culture implies that a balance between protection of these values, the opportunity of unique experiences for visitors, and benefits for the local community, has to be achieved. These principles are established in the «World Heritage and Sustainable Tourism Programme» (UNESCO 2012), where sustainable tourism constitutes an integrated part of area management.

A well-developed and well managed tourism sector in the two areas is considered necessary to maintain this balance and secure environmental, sociocultural and economic sustainability. Tourism management represents both a framework and a policy instrument to control the development in the respective areas.

Policy-making and strategy formulation in the local planning requires substantial knowledge on the structure and nature of the tourism in the two areas. Number of tourists in different segments, behaviour and attitudes, preferences as regards attractions and experiences, satisfaction issues, mobility and means of transport are essential variables. Also knowledge on how and to what extent tourism contributes to the local economy is essential.

## Data collection I: The on-site field survey

The first step in local data collection was a two page paper questionnaire distributed and collected among visitors on-site. In total, 3 204 questionnaires were collected. In the Nærøysfjorden area, 1 076 questionnaires were collected in Aurland (of which 128 from cruise passengers), and 350 and 384 in the neighbouring municipalities Vik and Lærdal, respectively.

In the Geiranger area a total of 1 394 questionnaires were collected, of which 671 in Geiranger (290 from cruise passengers). 723 questionnaires were collected at the ferry

crossing Linge – Eidsdal, north of Geiranger, comprising car travelling tourists entering the Geiranger Area or leaving the area.

## Round trip tourism is dominating

A majority of the visitors– 63 percent in the Nærøyfjord area (Aurland municipality) and 80 percent in the Geirangerarea – are on a type of round trip travel (table A).

Table A Main type of trip by place of interview (cruise passengers not included). Percent.

	Aurland municipality	Lærdal	Vik	Geiranger	Eidsdal/Linge	All
Round trip in Norway by car, MC, mobil home	43,7	59,7	57,4	59,8	74,9	58,0
Round trip in Norway by coach	5,6	0,5	0,0	18,3	0,3	4,5
Other type of round trip	13,8	0,3	0,3	5,4	2,5	6,1
All round trip travellers	63,0	60,5	57,7	83,6	77,7	68,6
Mountain hiking with overnight stay	7,6	5,3	3,7	1,9	2,4	4,6
Biking Rallarvegen mountain road/Flåm valley	1,6	0,3	0,9	0,5	0,4	0,9
Other holiday trip with overnight stay in the area	9,8	11,1	15,4	5,9	5,4	9,0
Total other type of holiday	19,0	16,6	20,0	8,4	8,2	14,5
Day visitors	7,7	10,8	8,9	4,9	11,1	8,8
Travelling through the area	8,5	12,1	13,4	3,2	2,9	7,5
More than one type of trip stated	1,7	0,0	0,0	0,0	0,1	0,6
	100,0	100,0	100,0	100,0	100,0	100,0

Most of the round trip travellers go by private car, MC or mobile home. In the Nærøyfjord area we also find other types of round trip travellers, mainly organised round trips including ship, Flåmsbanen railway and bus (like for instance the trip «Norway in a nutshell»). In Geiranger we also find a significant number of coach travellers.

Particularly foreign visitors are round-trippers, 73 percent in the Nærøyfjord area and 90 percent in the Geiranger area. Among Norwegian tourists the proportion of day visitors and people just travelling through the area is relatively high.

## Significant local accommodation

Despite the high proportions of round trip travellers, there is a relatively high proportion of travellers (not including cruise ship passengers) who spend at least one night in the respective areas.

Aurland:

- Every third visitor spent the night before and/or the next night within Aurland municipality. 50 percent of these visitors spent both last night and next night in Aurland.
- 12-13 percent of the visitors in Aurland spent at least one night in neighbouring areas (inner parts of the Sogn region), while 10 percent spent one night in Voss (the municipality south of the Nærøyfjord area).
- 20 percent of the visitors in Aurland spent the previous and/or the next night in Bergen or in the Hardanger region.

Lærdal:

- Just above 40 percent of the visitors interviewed in Lærdal stated that they had spent the night before in the inner parts of the Sogn region, mainly Lærdal (18 percent), Aurland and Sogndal. 60 percent planned to spend the next night in this region, of which 25 percent in Lærdal.

The Geiranger area (the municipalities of Stranda and Norddal):

- About half the number of the respondents spent at least one night in the area, and one third of these (15 percent) spent both the previous and the next night in the area.
- 29 percent of the Geiranger visitors spent the previous night – and 26 percent would spend the next night – in neighbouring municipalities in the Sunnmøre region. The most important of these is Rauma municipality, from which the Trollstigen serpentine road is the major access to Geiranger from the north.

## Accommodation

Foreign visitors find accommodation mostly in hotels, B & B or similar accommodation (40 percent), camping sites (36 percent) and rented cabins (7 percent). 8 percent stated that they spent last night camping outside commercial camping sites.

For Norwegian visitors, private accommodation is much more common, 52 percent only stated hotels, camping sites or rented cabins as they accommodation the previous night.

The figures are relatively similar in both the Nærøyfjorden and the Geiranger areas.

## Length of stay

The main picture is that short stays are dominant among those who do not stay overnight. In Nærøyfjord about 60 percent of the respondents stayed less than two hours, while the corresponding figure for Geiranger is about 50 percent. Around 30 percent stay between 2 and 5 hours. In Vik and Lærdal 85 and 75 percent, respectively, stay less than two hours.

Table B How long do you stay in this place before you travel on? Not including visitors with overnight stay. Percent.

Duration	Ordinary day visitors				Cruise ship passengers		
	Nærøyfjorden	Geiranger	Lærdal	Vik <sup>4</sup>	Duration	Nærøyfjorden	Geiranger
0-2 hours	61,7	51,2	75,9	84,9	0-2 hours	6,3	14,3
2-5 hours	27,0	30,0	17,9	8,6	2-4 hours	21,3	35,1
Day visit > 5 hours	11,2	18,8	6,1	6,5	> 4 hours	72,4	50,7
	100,0	100,0	100,0	100,0		100,0	100,0

Cruise passengers stay longer. A large majority in Flåm (Nærøyfjorden) stay more than four hours (72 percent), while 51 percent of the cruise passengers in Geiranger stayed more than four hours ashore. In both areas a large proportion of cruise passengers attend shore excursions like the Flåmsbanen railway and round trips by coach.

<sup>4</sup> Gjelder kun besøkende som har oppgitt stopp i Fresvik eller Viksøyri.

### The world heritage site status is well known

The world heritage site status of the two Western Norway fjord areas is well known among visitors. Most Norwegian visitors – 70 percent in the Nærøyfjord area and 74 percent in the Geiranger area – were aware of this before the visit. The status is also well known by foreign visitors, appr. 60 percent of the visitors in both areas.

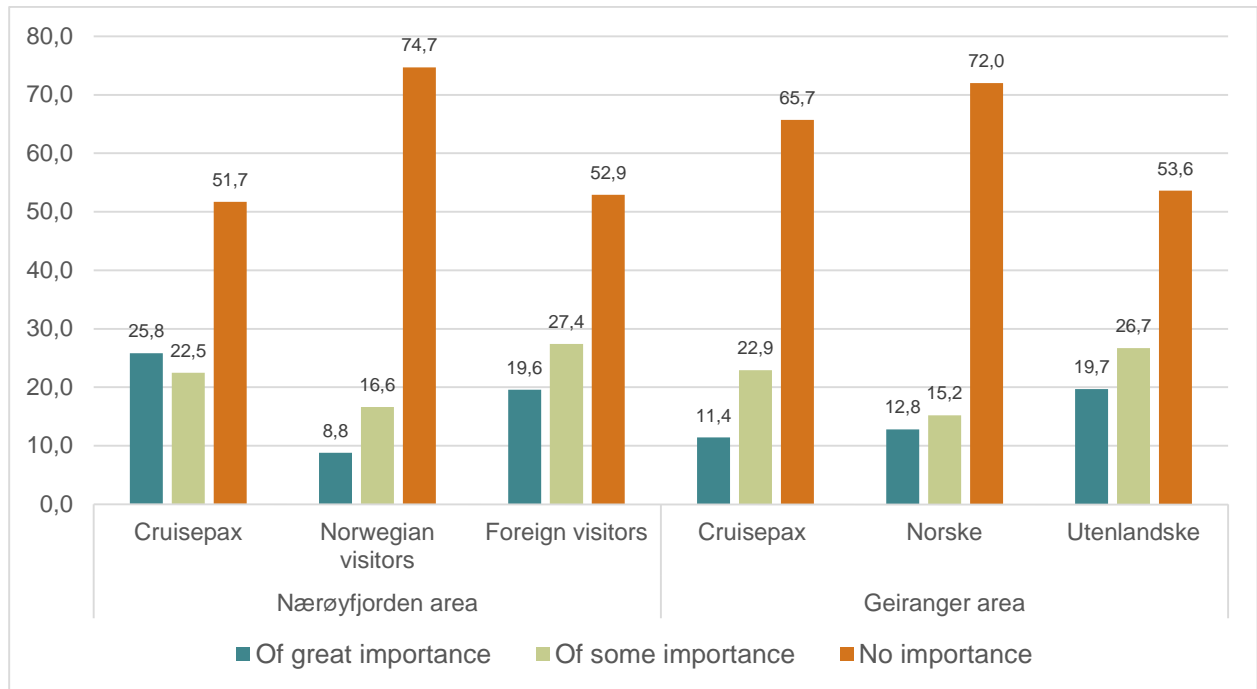


Figure 1 The importance of world heritage site status for deciding to visit the area. Visitors who knew about the status before the decision only Percent.

Although well known, the world heritage site status has overall a limited impact on travel decisions. Among visitors who knew about the status (figure 1), other than cruise passengers, about 20 percent of the foreign visitors in both areas stated that the status was of great importance for their decision to visit the area. This constitutes about 11 percent of all visitors – whether they knew about the status or not. Among all Norwegian visitors, 6 percent in Nærøyfjorden and 10 percent in Geiranger stated that the world heritage site status was of great importance.

Among cruise passengers (all) there are 13 percent of the Flåm visitors and 6 percent of the Geiranger visitors who states that the status was of great importance for choosing a cruise trip that included the respective destinations.

### Knowledge of and visits to local attractions

The knowledge of local attractions and experiences (figure 2) is relatively good among the visitors in the Nærøyfjorden area (not including cruise passengers). The “Flåmsbanen” railway and the fjord cruise are the best known and most popular.

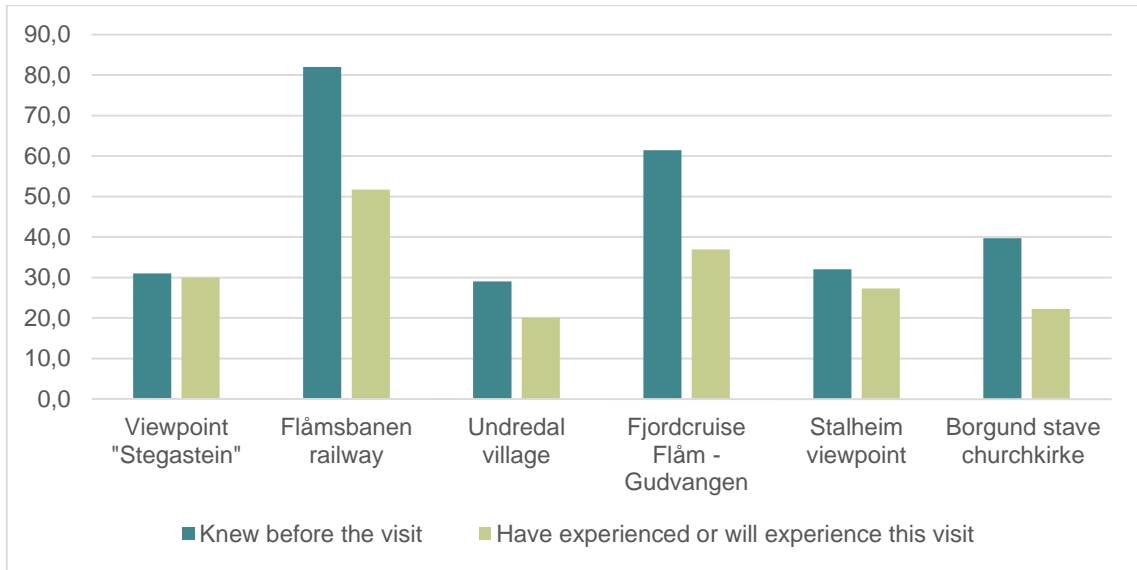


Figure 2 Attractions in the Narøyfjorden area. Visitors who knew the attraction before the visit and who experience the attraction during the visit. Exclusive cruise passengers. Percent.

The National Tourist Road between Geiranger and Trollstigen is the most well-known attraction in the Geiranger area, while also the viewpoint Dalsnibba mountain, the ferry trip and the sightseeing on the Geiranger fjord is known by more than 50 percent of the visitors.

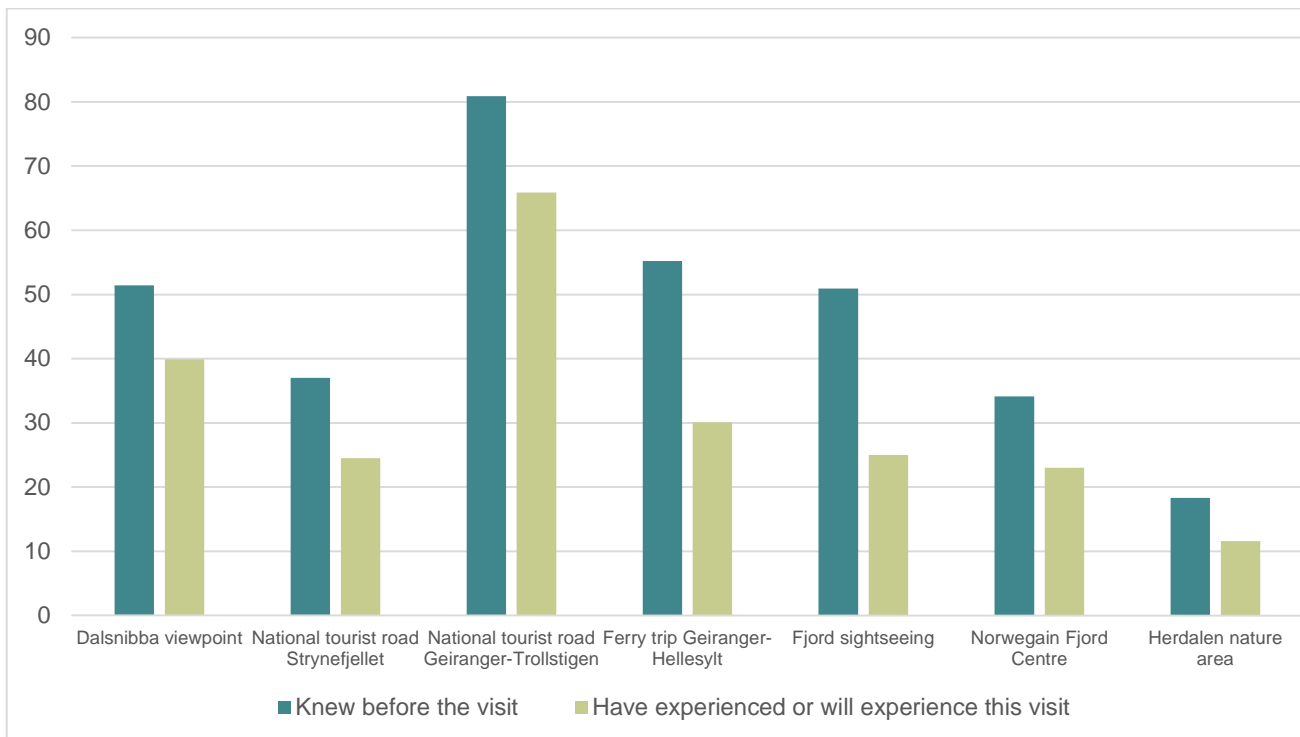


Figure 3 Attractions in the Geiranger area. Visitors who knew the attraction before the visit and who experience the attraction during the visit. Exclusive cruise passengers. Percent.

## **Data collection II: Online survey**

### **Main findings**

A more comprehensive survey was conducted online by using an electronic questionnaire. This was sent to the respondents who had accepted participation in the online survey by filling in their E-mail address in the on-site survey questionnaire. The final sample comprise a total of 647 respondents, of which 304 Nærøyfjord area visitors and 343 Geiranger area visitors.

The survey focused on the visitors' perceptions and attitudes towards nature and culture landscape elements, environmental issues, traffic, information, satisfaction with various parts of the tourism product etc, in the two areas.

There are generally very coinciding views of the importance of natural and human created landscape elements for the tourists' experience of the two world heritage sites:

Nature and landscape elements are of major importance in both Nærøyfjorden and Geiranger. In the eyes of the visitor, the fjord and mountain scenery characterizes the two world heritage sites, while individual elements such as beaches and caves are less important.

Man-made elements are also of major importance for the tourist experience of the two areas, albeit of somewhat less importance than the landscape elements. The cultural landscape is most important, while the visual experience of cruise ships is somewhat lower. The overall impression of building styles and aesthetics is also positive (the perception of commercial advertising signs is a bit more varied).

Regarding the degree of satisfaction with traffic conditions, there is some difference between the two areas. In both areas, traffic conditions in the village center in terms of for instance parking conditions and traffic congestion, are considered to be somewhat less satisfactory, and especially in Geiranger.

The arrangement for pedestrians and cycling is also considered to be better in the Nærøyfjord area than in Geiranger. Also regarding pollution and noise, Geiranger is regarded slightly worse than the Nærøyfjorden. However, the safety of activities on land and in the fjord is considered to be very high in both areas.

The Geirangerfjord World Heritage Site scores highest on information about the world heritage, which is probably related to high satisfaction with the Norwegian Fjord Centre in Geiranger. The overall impression is also that the tourists are well pleased with the tourist offers in both fjord areas, and in particular the local tourist information centers, the accommodation offers and the service setting of the tourism industry is appreciated. However, the price level scores relatively low on the satisfaction scale.

In both areas, many people experience good contact with locals and, in particular, many are very pleased with the general atmosphere and authenticity of the two world heritage sites. There is also a certain percentage of visitors who would like to contribute their own work to safeguard the world heritage.

## **Visitor numbers and tourism revenues**

Part 2 of this report visitor volume, tourism-related turnover and value creation figures for each of the municipalities Aurland, Lærdal, Stranda and Norddal.

### **Visitors and guest-nights in the Nærøyfjord area**

Estimated number of visitors (which stops) in Aurland municipality in 2015 is 921,400, of which 182,400 are cruise passengers who went ashore. Of the 739,000 who were not cruise passengers, about 450,000 travelled with the Flåmsbanen railway.

Outside cruise passengers, about 560,000 people made a stop in Flâm, 268,000 in Aurlandsvangen, 309 000 Gudvangen, 162 500 Stalheim and about 88 000 Undredal. Of those who stopped in Aurland municipality, about 180,000 also stopped in Lærdal.

The number of guest nights in commercial accommodation is estimated at approximately 132,000 in Aurland municipality in 2015, of which 75,000 in hotels, 32,000 in cabins / apartments / rooms and 25,000 in camping sites. In Lærdal there were a total of about 98,000, of which 45,000 in hotels, 28,000 in cabins / apartments / rooms and 25,000 in camping sites.

### **Visitors and guest-nights in the Geiranger area**

The total number of visitors to the Geiranger area is estimated at approximately 500,000, excluding cruise passengers.

The records for the Stranda harbour service shows that there were a total of 331,800 passengers on board the cruise ships that had arrived in the municipality. Assuming that about 95 percent goes ashore, this constitutes 315,000 visitors. Including these, we find a total number of visitors in Stranda and Norddal municipalities in 2015 of approximately 815,000 visitors.

Outside cruise passengers, about 430,000 visitors stopped in Geiranger, 89,000 in Hellesylt, 62,000 in Stranda (municipality center), 26,500 in Tafjord and 32,500 in the landscape area Herdalen. About 295 000 reported that they had stopped at the Trollstigen serpentine road. Number of guest nights in commercial accommodation in Stranda municipality is estimated at approximately 209,000 in 2015, of which 111,000 in hotels, 40,000 in cabins / apartments / rooms and 58,000 in camping sites. In Norddal the total estimate for 2015 is 75,000, of which 9,000 in hotels, 21,000 in cabins / apartments / rooms and 45,000 in camping sites.

### **Tourism-related turnover and value creation**

The survey at the respective locations provided the following figures for tourists' spending during the visit (excluding accommodation costs):

*Table C Tourist' spending during visit (per day). Summer 2015. Norwegian kroner (NOK).*

	Total	Norwegian visitors	Foreign visitors
Nærøysfjord area, excluding cruise passengers	535	434	578
Geiranger area, excluding cruise passengers	550	462	578
Cruise passengers Flâm (Nærøysfjord)	492	-	492
Cruise passengers Geiranger	480	-	480
Vik municipality (no cruise passengers)	321	271	408
Lærdal municipality (no cruise passengers)	406	355	447

The compilation of the individual expenditure figures and the estimated number of visitors provides usable estimates of total tourist consumption as seen from the demand side. However, both consumer figures and visitor numbers are subject to some uncertainty, and we lack accommodation costs. Therefore, we have also used figures for housing sales (Statistics Norway) and accounting figures from the Norwegian Enterprise Register as correction factors.

- We find a total tourism-related turnover in Aurland municipality in 2015 of approximately NOK 472 million, excluding value added tax. This is distributed by approximately 175 million in accommodation and catering, 132 million NOK in revenues at Flåmsbanen, 116 million kroner in various retail trade (including gasoline) and 48 million kroner in enterprises that conduct experience activities, guiding etc.
- The revenue of approximately NOK 472 million implies a value creation of approximately NOK 175 million, of which approximately NOK 105 million in earned salary income in Aurland municipality.
- Turnover in Lærdal in 2015 related to tourists who visit places in Aurland municipality is estimated at around NOK 65 million (excluding VAT).
- Total tourist-related turnover in Stranda municipality is estimated at approximately 349 million exclusive VAT. This amounts to NOK 179 million in accommodation and catering, NOK 87 million in various retail trade (including gasoline) and NOK 83 million on experience activities and guiding.
- In Norddal municipality, a total tourism-related turnover of NOK 68 million (excluding VAT) is estimated for 2015, of which NOK 27 million in accommodation and catering, NOK 40 million in various retail trade (including gasoline) and approximately NOK 1 million in experience activities / guiding.
- Total tourism-related value creation in Stranda and Norddal is estimated at NOK 113 million excluding VAT, including salary income of NOK 104 million.
- Difficulties in calculating visitor numbers and accommodation figures for Vik municipality, as well as poor availability of tourism enterprise accounting figures, implies that we have not been able to calculate tourism-related sales and value creation. It is, however, estimated that retail trade and gas sales to tourists amounted to approximately NOK 31 million in 2015.