Institute of Transport Economics
Norwegian Centre for Transport Research

ENGLISH **Summary**

The Norwegian Air Travel Survey 2023

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Domestic traffic reached 14.6 million journeys in 2023. This was 93% of the traffic volume in 2019, which was the last normal operating year before the pandemic. The leisure market has almost fully recovered after the pandemic (97% of the 2019 level), while work-related travel was at 88% of the 2019 traffic. The share of work-related journeys now accounts for 41% of domestic air traffic, compared to 43% in 2019 and 50% in 2013.

On the routes between Norway and other countries, there were 20.4 million passengers in 2023. This was 89% of the level in 2019. Here too, leisure traffic has recovered faster after the pandemic (92% of the 2019 level), while the number of work-related trips between Norway and other countries was 81% of the 2019 traffic. The number of leisure trips abroad by Norwegians stagnated in the years leading up to the pandemic, while the number of foreign tourists to Norway increased significantly.. Out of the pandemic, incoming tourism has also recovered more than Norwegians' leisure travels out of the country. Business travel continues to weaken compared to leisure travel. In 2023, 24% of air travel to/from Norway at Avinor's airports was related to work purposes. In 2019, the share was 27%, and in 2013 it was 34%.

About the survey

Avinor's Air Travel Survey 2023 (RVU 2023) is the most recent in a long series of surveys that Avinor has conducted among its passengers since 1972. In RVU 2023, 37,000 domestic passengers and 90,000 international passengers responded to questions about the journey they completed. The survey was conducted at nine airports. All airlines and most of the routes from Avinor's airports of significance are represented in the survey.

Domestic air traffic – almost full recovery for the leisure market and an increasingly higher share of foreigners

The average number of domestic flights taken per capita has decreased and is now at 1.9 trips. In 2019, the number was 2.2 trips, while the number was 2.4 trips ten years ago. Travel frequency is decreasing in all parts of the country, but relatively speaking, the reduction was greatest among residents of Eastern Norway and least in Northern Norway, with only a 3% reduction in travel frequency from 2019 to 2023.

SAS is still the largest operator in the domestic market with a market share of 42% in 2023. Norwegian had a market share of 37%, while Widerøe had 21%. SAS lost market shares through the pandemic. The number of passengers transported on domestic routes in 2023 was only 83% of the level in 2019. For Norwegian, the corresponding figure was 92%, while Widerøe had 17% more passengers on their domestic flights in 2023 compared to 2019.

The share of business travel is dropping. In 2023 it accounted for 41% of all domestic air travel, compared to 50% ten years ago. In particular, the number of journeys related to oil and gas operations are down. The share of these journeys fell from 13% in 2013 to 8% in 2023. But other types of business travel also continues to fall – the trend indicates a decline in domestic business traffic going forward.

The leisure market has almost fully recovered after the pandemic - traffic volume in 2023 was 97% of the level in 2019. The trend indicates falling growth rates. From 2013 to 2019, the number of domestic leisure trips increased on average by 3.0% per year. The average growth in the ten previous years was 3.8% per year. The most important sub-market is still "visit friends/relatives" (VFR), accounting for 24% of all domestic traffic in 2023. However, the growth in the years leading up to the pandemic (2013-2019) was lower for VFR trips than for holiday and weekend trips, respectively 1.8% and 4.1% per year. Domestic holiday and weekend trips were at the same level in 2023 as before the pandemic.

The number of foreigners on domestic flights continues to increase. 18% of domestic journeys are now made by residents abroad. From 2013 to 2023, the number more than doubled, from 1.2 million to 2.5 million trips. The route with the highest number was Oslo-Tromsø with 116,000 foreign passengers in 2023, equivalent to 10% of the total number of travellers on the route. The highest share of foreigners in 2023 was Oslo-Svalbard (25%) and Bergen-Tromsø (17%).

Oslo-Trondheim is the largest domestic route with 1.90 million passengers in 2023. Oslo-Bergen is the second largest with 1.84 million passengers, while Oslo-Stavanger is the third largest with 1.45 million. The traffic on these routes was respectively 90%, 92% and 87% of the level in 2019.

International air traffic – strongly affected by the pandemic, but approaching 2019 levels

International air travel to/from Norway was severely affected by the COVID-19 pandemic and travel restrictions from March 2020 to the first half of 2022. Traffic dropped from 24.6 million trips in 2019 to 21.9 million trips in 2023, of which 20.4 million were scheduled flights and 1.5 million charter flights. Oslo Airport holds a market share of 66%. Since 2013, traffic growth has been stronger for inbound passengers (passengers residing abroad coming to Norway) than for outbound passengers (Norwegians travelling abroad). The number of international leisure trips to/from Avinor's airports increased from 9.2 million trips in 2013 to 13.1 million trips in 2023. At all major airports, the number of Norwegian business trips decreased from 2019 to 2023.

The market is still dominated by Norwegian and SAS, who now carry just over three out of five international passengers. The most important destination country for intercontinental trips remains USA, followed by Thailand. Amsterdam has overtaken Copenhagen as the most important transfer airport abroad.

Norwegians' international holiday and leisure travel increased by 0.6 million trips from 2013 to 2019, but the decline over the four years from 2019 to 2023 meant that the number of 6.5 million trips in 2023 was barely above the level from ten years earlier. In 2023, holiday/weekend trips accounted for almost 70% of leisure travel, and VFR about 30%. Alicante has surpassed London as the most popular destination for Norwegians, and Malaga has passed Copenhagen as the third largest destination. The share of short journeys (less than four nights) increased the most from 2013 to 2023, while journeys of more than seven nights decreased. From 2019 to 2023, the growth in foreigners' commercial overnight stays in Norway was higher than the growth in Norwegians' overnight stays. This trend has strengthened over the last year with a significant increase in foreign overnight stays and a slight decrease in Norwegian ones. International tourists travelling via Avinor's airports are mostly from the UK, Germany, and USA, which are the largest markets, with about 0.5 million travelers each. Visitors from Poland and France follow thereafter, with nearly 0.3 million each.

Traffic development

Aviation has experienced turbulent years, and there has been uncertainty regarding traffic development post-pandemic. Air travel in 2023 has not returned to pre-pandemic levels, neither domestic travel nor international journeys. Recovery has been weaker for business travel than for leisure travel. The trend before the pandemic showed that Norwegians are flying less domestically. This trend may continue, and we assume that there will be no further "catch-up" travel for domestic traffic. For international travel to/from Norway, the trend indicates that recovery may still occur, both for incoming journeys (international tourists and business travelers) and for Norwegians traveling abroad for leisure.