Forecast for Norwegian and foreign holiday and leisure traffic in Norway

Margrethe Helgebostad
Optimism at the start of the summer season

With three good summer seasons in a row, the Norwegian tourism industry and foreign actors who sell Norway as a destination are optimistic.
Innovation Norway's forecast is clear: we are looking at another great summer

• The purpose of the Tourist Barometer is to provide an overview of the expected growth in traffic broken down by markets and sectors.

• After three record summers in a row, the level is not merely expected to stay high; many expect a further rise in volumes.

• The expert panel is made up of 133 representatives from the tourism industry at home and abroad. They are tour operators, inbound operators, accommodation providers, carriers, Hurtigruten, activity and attraction enterprises, local tourist offices, regional destination marketing companies, and Innovation Norway's marketing managers in the respective markets.

• The good results from the Tourist Barometer are supported by data from booking solutions that shows that the number of sold air tickets to Norway with one or more overnight stays is currently 15 per cent higher for the period 1 May – 31 August 2017 than it was for the same period in 2016. Innovation Norway's Tourism Survey shows that 45 per cent of all holidaymakers arrive in Norway by air.

• Optimism reigns in all markets where Innovation Norway is promoting tourism. However, the answers given by the British and French respondents were somewhat mixed.
The majority come in the summer
In 2016, the number of foreign overnight stays rose by 10 per cent, with no less than 74 per cent of that rise coming in the summer months.

• After three great summers of fantastic traffic growth, one might expect it to level off. However, the expert panel believes that the number of tourists in Norway will continue to rise. Large parts of the country had a good summer season last year. Southern Norway, mountain areas in Norway, and Northern Norway reported great summers. However, it was the fjord countries, with their 15 per cent rise in foreign overnight stays in the summer season 2016, that especially noticed the increased interest in Norway as a holiday destination.

• The tourism industry in Norway is largely a seasonal industry, with more than half of all overnight stays in the summer months of May to August. Some regions of the country can even experience periods when there are too many tourists, while others would welcome more.
A look back
There have been three great summer seasons in a row, and further growth is expected.

The number of commercial overnight stays increased by 10% from 2014 to 2016.
- Norwegian overnight stays: 6%
- Foreign overnight stays: 21%

Source: Statistics Norway
Tourism in Norway is largely seasonal. In 2016, 52 per cent of all overnight stays came in the summer season, and of the 10 per cent growth from abroad in 2016, 74 per cent came in the summer months of May to August.
Fjord Norway saw the largest growth in foreign overnight stays in the 2016 summer season. It is worth noting that there were just as many foreign overnight stays as Norwegian overnight stays in the summer season. The four fjord counties that make up Fjord Norway had more foreign overnight stays than Eastern Norway with its seven counties.
The growth seen in the last few years has been higher than the tourism industry had dared hope for.

61 per cent believe that this year’s summer season will be better than last year’s.

Question: What are your expectations for the traffic to Norway this coming summer season compared to last summer season?
At the start of the summer season, 61 per cent expect the growth to continue, while 28 per cent think this summer will be the same as last year. 11 per cent expect a decline in numbers.

---

**Question:**
What are your expectations for the traffic to Norway this coming summer season compared to last summer season?

**Source:** Norway's Tourist Barometer and Innovation Norway
Expectations for the summer season: Norwegian vs. foreign respondents

The Norwegian respondents are, as always, the most optimistic, but expectations are generally high.

Source: Norway's Tourist Barometer and Innovation Norway
Expectations per market and size of the market

The responses from British and French respondents are mixed. Optimism reigns for the majority, while among the British, 33 per cent expect fewer visitors in the summer. Of the French respondents, 27 per cent are not as optimistic at the start of the summer.

Asia and Spain are not included because there were too few respondents.

Innovation Norway promotes Norway as a holiday destination in Norway, Germany, Sweden, the Netherlands, the UK, the USA, Denmark, China, France, Spain, Italy, Japan, South Korea and Russia.
Expectations for the summer season per sector

54 per cent of the foreign tour operators, who represent the largest single group in the survey, believe this year's summer season will be better than 2016's.

Source: Norway’s Tourist Barometer and Innovation Norway
Innovation Norway's Tourism Survey shows that 45 per cent of foreign holidaymakers arrive in Norway by air.

As per May 2016, 15 per cent more air tickets have been booked for the summer season.
15 per cent more air tickets to Norway with one or more overnight stays have been booked for the period 1 May - 31 August 2017 than had been in the same period in 2016.

The graph shows the share of sold air tickets per nationality. The figures in brackets are the percentage change from the 2016 summer season.

Forwardkeys sammenstiller bestillinger fra de store bookingløsninger som Amadeus, Sabre, TravelPort with Galileo & Worldspan, TravelSky, Abacus og Axess.

Kilde: Forwardkeys
The 15 per cent rise in the number of booked air tickets breaks down as follows in relation to the number of nights tourists will stay in Norway before leaving the country.

- 1 night: 11%
- 2 nights: 15%
- 3 nights: 19%
- 4-5 nights: 9%
- 6-8 nights: 25%
- 9-13 nights: 14%
- 14-21 nights: 14%

Source: Forwardkeys
Means of transport to Norway for holidaymakers per nationality

- All foreign holidaymakers
- USA
- United Kingdom
- Spain
- France
- Switzerland
- Italy
- Other outside Europe
- China
- Other Europe
- Germany
- Denmark
- Netherlands
- Sweden

Legend:
- Aeroplane
- Ferry
- Car
- Car with campervan/motor home
- Train
- Tourist coach/scheduled coach
- Motorcycle
Background and methodology

• An electronic questionnaire was sent out and was accessible from 8 May to 30 May 2017.
• 133 participated in the survey.
• The purpose of the Tourist Barometer is to provide an overview of the expected growth in traffic broken down by markets and sectors.
• Those who participate in the survey have over the last 12 months been involved in Innovation Norway's campaigns and activities, with the exception of the Norwegian inbound operators.
• The expert panel is made up of representatives from the tourism industry at home and abroad. These represent tour operators, inbound operators, accommodation providers, carriers, cruises, activity and attraction enterprises, local tourist offices, regional destination marketing companies, and Innovation Norway's marketing managers in the respective markets.
• The survey is conducted twice a year, before the summer and winter seasons.
• This is the 29th time the Norwegian Tourist Barometer has been conducted.
Tusen takk!
www.innovasjonnorge.no