



Key Figures for Norwegian Travel and Tourism

2019



Contents

01	Key Figures	06
02	The importance of tourism to Norway	08
03	Tourism Year 2019	16
04	Environmental considerations	49
05	Norwegians' attitude towards tourism	53
06	Norwegians' holiday habits	61
07	Cruises	65
08	International meetings	69

The past year as we understand it

At the time of writing, the travel and tourism industry all over the world is in a crisis that few can see the full extent of. Overnight, borders were closed, flights were grounded, and hotels and other places of hospitality and attractions were closed. Few could imagine that the world could change so quickly from one day to the next. After extensive global efforts to prevent the spread of Covid-19, all holiday and business trips were cancelled after mid-March. The newest figures from the World Tourism Organization (UNWTO), which have now been published, show a 97 per cent decline in international arrivals in May.

Norwegian tourism was probably on its way to another year of increased value creation

Overnight Stay Statistics from Statistics Norway published for February 2020 are the latest in a series of indicators of strong growth in tourism in Norway. For the most part, there has been continuous growth from abroad since January 2014. 2015 was an unusual year for Norwegian tourism. The decline in the oil sector led to fewer overnight business trips, and holiday and leisure traffic was the sole driver behind the growth. In the following years, holiday traffic has been a strong driver in Norwegian tourism throughout the year.

Total tourist expenditure is estimated to be NOK 186 billion according to figures from Statistics Norway. This means that the industry accounts for 4.2 per cent of Norway's GDP. The travel and tourism industry employed 168,700 people in 2018, an increase of 2.2 per cent from the previous year. At the same time, the number of full-time equivalents in Norway as a whole increased by 1.8 per cent. This means that the industry increased its share of employment in Norway for the sixth year in a row. Transport and food service establishments employ the most people, followed by accommodation providers.

2019 had lower international growth than expected

International arrivals increased by 4 per cent in 2019 and reached a new milestone with 1.5 billion cross-border journeys. Despite growing, this number was lower than expected. Much of this can be blamed on lower demand in Europe. The year was marked by uncertainty on the world's stock exchanges, uncertainty around Brexit, and the trade war between the US and China. It was also the year that Thomas Cook and several low-cost travel companies went bankrupt.

In Norway, we had challenges with the period of the greatest growth being the summer season and in places that already had many tourists. Innovation Norway's Norwegian Citizen Survey shows that there was growing dissatisfaction among Norwegians living in smaller areas that at times had many visitors. You can read more about this and the 2019 Tourism Year as a whole in the brochure.

Task from the Government

In the letter of assignment from the Ministry of Trade, Industry and Fisheries, it states: "Innovation Norway will gather, compile and disseminate statistics and market analysis relevant to the travel and tourism industry". Only a small part of this is covered in this brochure. **More information and the whole report can be found on Innovation Norway's website visitnorway.no/innsikt**



Margrethe Helgebostad
Analytics Manager, Tourism

01 Key Figures 2019



Key Figures

	2012	2013	2014	2015	2016	2017	2018	2019	Change from last period
Employment in the tourism industry									
Full-time equivalents, salaried employees, and self-employed people	153,000	153,800	157,000	159,200	162,600	165,100	168,700 ¹		2%
Tourist consumption in Norway by consumer group. Current prices. Figures in millions									
Total consumption	136,882	145,156	151,416	158,669	170,002	176,306	186,308 ¹		6%
Foreign tourist consumption in Norway	36,574	38,214	40,629	45,407	50,201	52,564	55,349 ¹		5%
Norwegian domestic tourist consumption in Norway	78,008	84,158	86,939	90,101	95,463	98,885	105,259 ¹		6%
Norwegian industries' business travel costs in Norway	22,300	22,784	23,848	23,161	24,338	24,857	25,700 ¹		3%
Tourism consumption. Figures in million NOK²									
Total expenditure							128,800	124,900	-3
Norwegian tourists							109,000	107,800	-1
Foreign tourists							19,900	17,100	-14
Overnight stays for leisure²									
All overnight stays for leisure							87,856,661	93,706,324	7%
Norwegian overnight stays for leisure							78,178,223	83,678,267	7%
Foreign overnight stays for leisure							9,678,437	10,028,057	4%
Overnight stays for business²									
All overnight stays for business							15,925,228	16,769,905	5%
Norwegian overnight stays for business							14,344,903	15,478,671	8%
Foreign overnight stays for business							1,580,325	1,291,234	-18%
Commercial overnight stays³									
All commercial overnight stays	29,914,832	29,243,016	30,306,594	31,653,839	33,114,132	33,296,767	33,812,674	35,179,554	4%
Norwegian commercial overnight stays	21,974,364	21,551,330	22,152,158	22,825,068	23,387,248	23,348,139	23,684,456	24,478,073	3%
Foreign commercial overnight stays	7,940,468	7,691,686	8,154,436	8,828,771	9,726,884	9,948,628	10,128,218	10,701,481	6%
Cabin rental overnight stays									
All cabin rental overnight stays	988,467	1,101,595	1,181,185	1,075,030	1,062,287	1,013,696	979,538	924,301	-6%
Norwegian cabin rental overnight stays	283,046	276,100	292,219	323,118	297,879	257,452	232,230	156,589	-33%
Foreign tourist cabin rental overnight stays	705,421	825,495	888,966	751,912	764,408	756,244	747,308	767,712	3%
Cruise tourism									
Number of visiting cruise passengers	588,000	620,000	574,000	511,000	658,882	749,414	852,241	944,994	11%
Number of day visitors from cruises docking in Norwegian ports	2,573,335	2,996,114	2,667,362	2,494,921	2,700,000	3,045,000	3,436,376	3,329,917	-3%
All holiday and leisure travel									
All holiday and leisure travel	17,000,000	19,190,000	19,140,000	17,880,000	17,320,000	18,350,000	22,220,000	18,500,000	-17%
Holiday and leisure travel in Norway	9,590,000	11,590,000	11,670,000	10,660,000	10,820,000	11,370,000	15,660,000	11,080,000	-29%
Holiday and leisure travel abroad	7,410,000	7,600,000	7,480,000	7,230,000	6,530,000	6,990,000	6,550,000	7,410,000	13%

¹ Preliminary figures.² The Tourism Survey was expanded in 2018, so there are no figures for previous years.³ Term used for overnight stays in commercial accommodation such as hotels, campsites, cabin villages, and youth hostels.

02 The importance of tourism to Norway



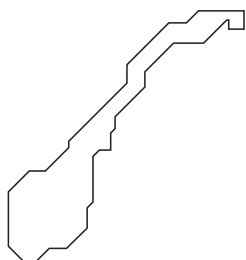
Norway has had strong development in tourism

This has resulted in more overnight stays and a positive contribution to the Norwegian economy. Total tourist consumption was estimated to be NOK 186 billion in 2018 according to preliminary figures from Statistics Norway. This increase of 6 per cent from 2017 corresponds to NOK 10 billion. Norwegian domestic tourist consumption increased by 6 per cent, and foreign tourist consumption by 5 per cent. Finally, we come to Norwegian industries'

expenses for business trips in Norway. This represents 14 per cent of the total consumption and an increase of 3 per cent compared to 2017.

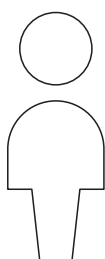
The importance of tourism to Norway is increasing in line with the rest of the Norwegian economy

The importance of tourism to Norway in 2018



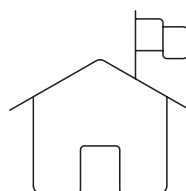
4.2% of GDP

Amounts to 121 billion



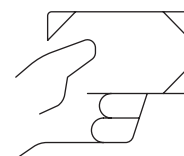
7 out of 100

Jobs in the travel and tourism industry, amounting to 168,700 employees



186 billion

Total tourist expenditure



55 billion

Foreign visitors' share of total tourist consumption, which amounts to 30 per cent

Good growth in revenues from tourism

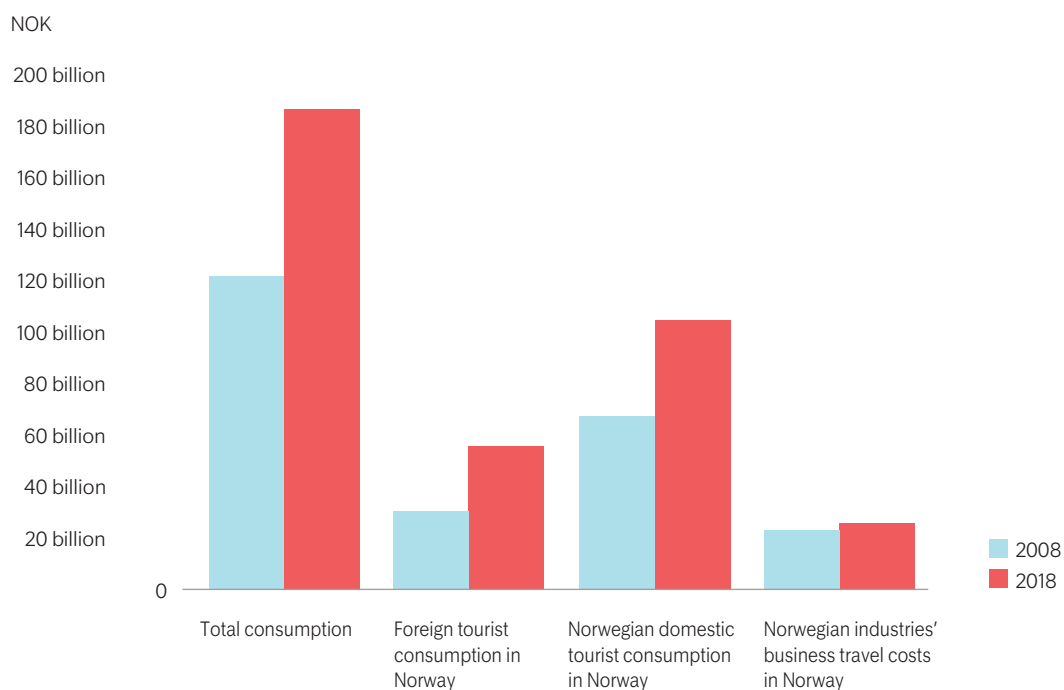
Positive development in the past 10 years

From 2008 to 2018, tourist expenditure increased from NOK 121.6 billion to NOK 186.3 billion.

This increase of 53 per cent corresponds to NOK 64.7 billion. Foreign tourists contributed to 34 per cent of the growth in the period. It is unusual that foreign tourists account for such a large share of the increase in

absolute figures because there are far fewer foreigners contributing to the figures than Norwegians. The same tendency is found again in figures from Statistics Norway for overnight stays, showing a development in commercial overnight stays. Here we see that foreign overnight stays represent 38 per cent of the growth in the same period.

Tourist consumption

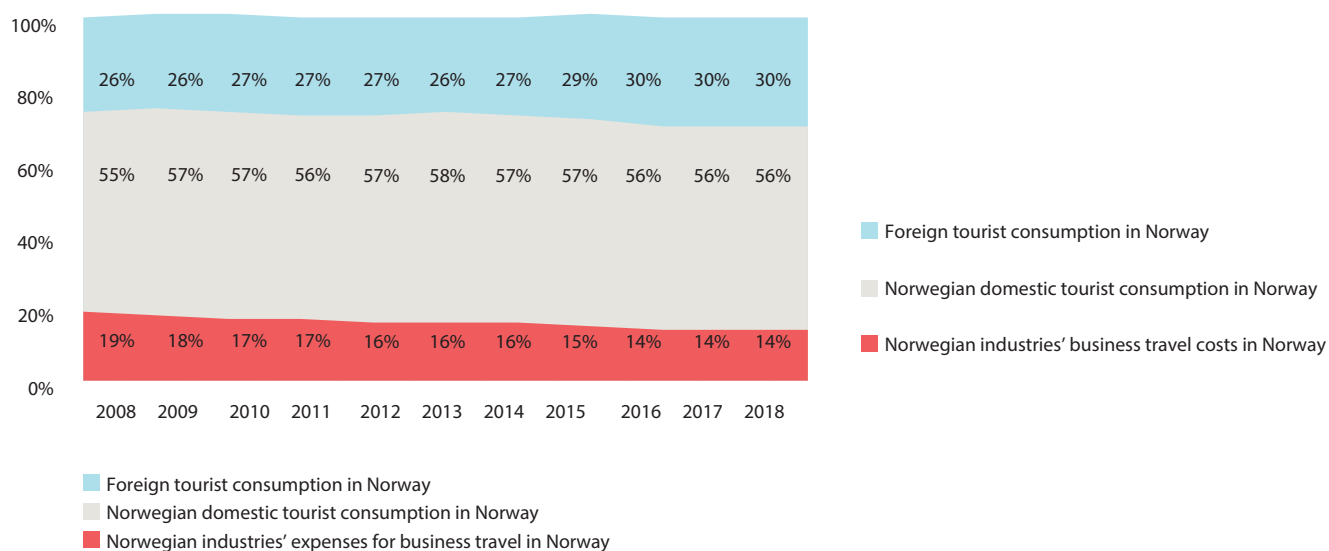


Foreign visitors contribute to record high

Of course, it is Norwegians who contribute the most to tourist consumption, be it spending on leisure or business trips here at home or the use of travel agents and tour operators. This has increased, but the contribution from foreign travellers has increased at a faster rate.

The expenditure by foreign tourists in Norway represents 30 per cent of the total consumption, which is a new record measured in absolute figures. Expenditures have increased from NOK 31 billion in 2008 to NOK 55 billion in 2018. This means that foreigners' share of consumption has gone from 26 per cent to 30 per cent.

There has been strong development in the contribution to the Norwegian economy from foreign tourists since 2007
Distribution of tourist consumption 2007-2018



Source:

Tourism Satellite Accounts, Statistics Norway

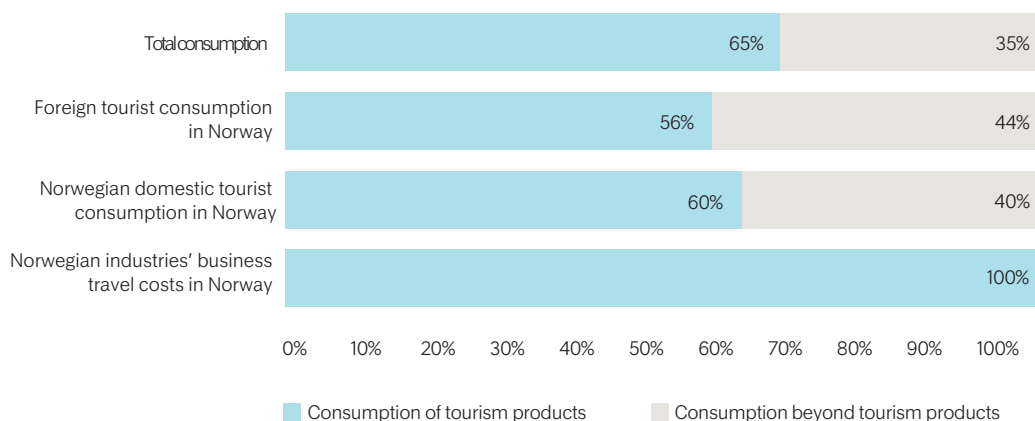
More industries make more money from tourism

Of the total consumption of NOK 186 billion, NOK 121 billion, which is a 65 per cent share, goes to the purchase of goods and services that come under what is defined as tourism products. At the same time, 35 per cent, or NOK 65.3 billion, goes towards the purchase of goods and services from other industries in Norway.

Preliminary figures from Statistics Norway show that growth in the travel and tourism industry was 2.6 per cent in 2018. In comparison, Norway's GDP increased by 2.2 per cent. This means that the travel and tourism industry grew faster than the economy of Norway as a whole that year.

Much of what Norway earns from tourism goes towards the purchase of goods and services that are not tourism products

Distribution of consumption of NOK 186 billion



Source:

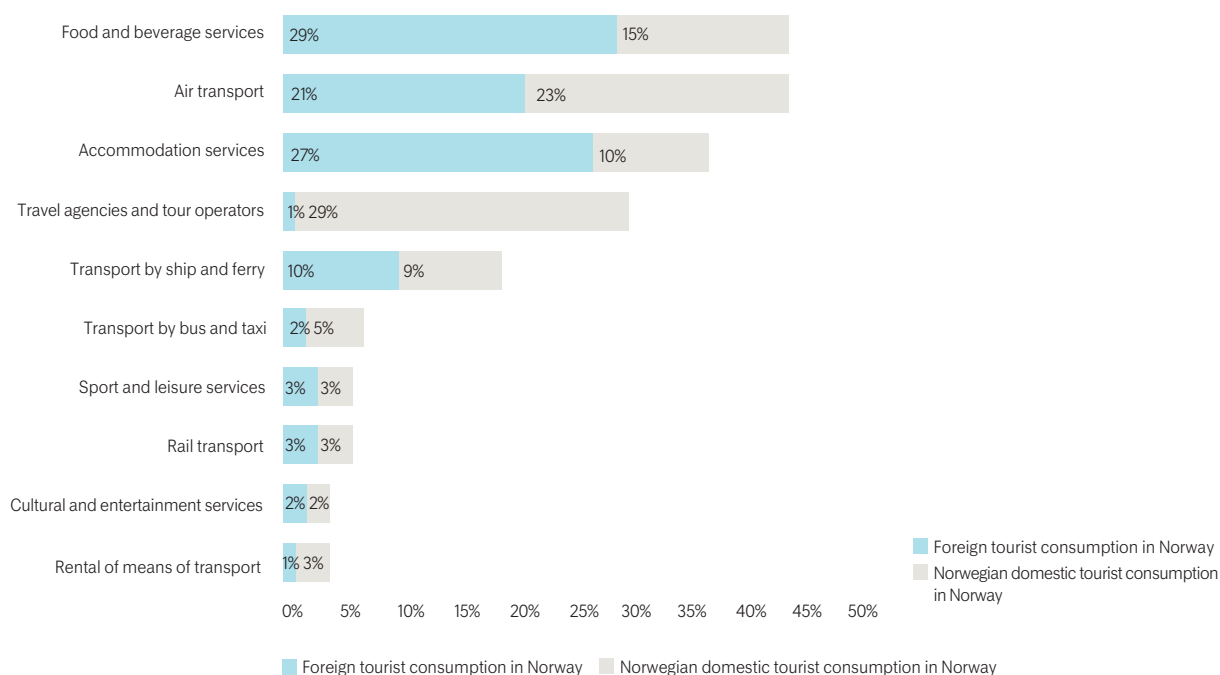
Tourism Satellite Accounts, Statistics Norway

NOK 121 billion was spent on goods and services that fall under what are called tourism products. This could be transport, accommodation, food and beverage services, and cultural and entertainment activities. Different types of transport services make up 42 per cent of the tourism

product, while food and beverage services represent 30 per cent and accommodations represent 16 per cent. The chart below shows how consumption is distributed between Norwegian and foreign tourists.

Distribution of tourist expenditure

The chart is sorted according to the largest total expenditure



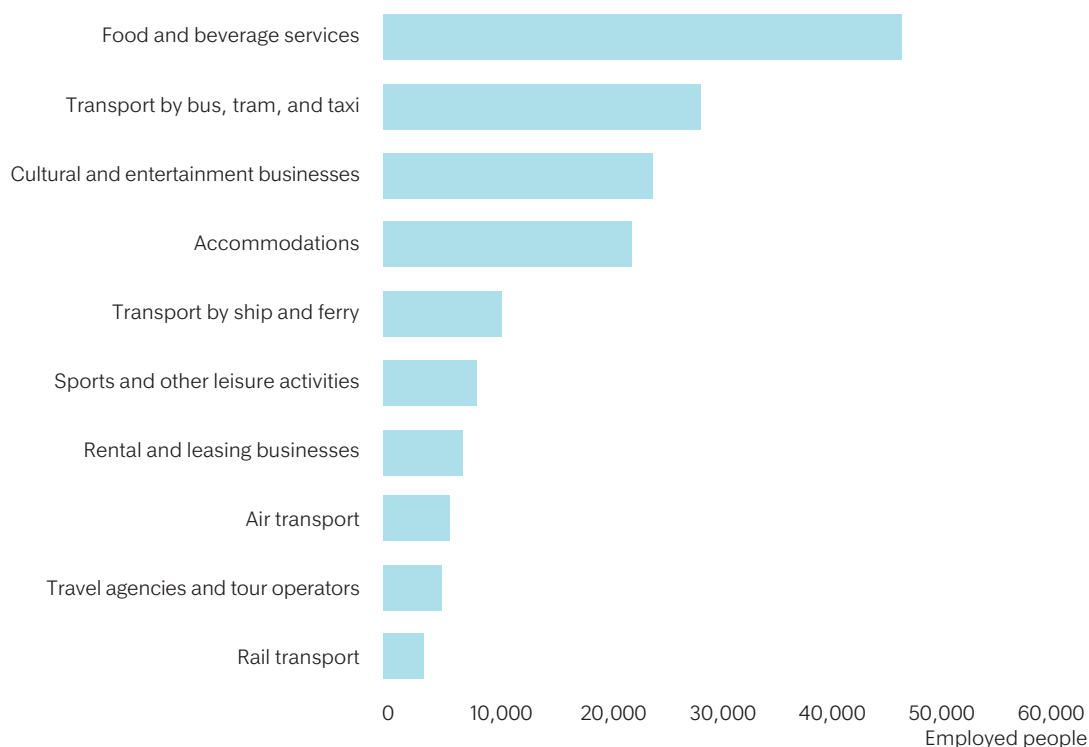
7 out of 100 work in the travel and tourism industry

In 2018, there were 168,700 employees in the travel and tourism industry, which is a 2.2 per cent increase from the previous year. At the same time, the number of full-time equivalents in Norway as a whole increased by 1.8 per cent. This means that the industry increased its share of employment in Norway for the sixth year in a row. The share of people employed in the travel and tourism industry accounts for 7.1 per cent of all employment in Norway.

If you are interested in the value creation figures for your county or municipality, these are available at www.visitnorway.no/innsikt

Most people work in transport and hospitality, with shares of 31 per cent and 29 per cent respectively. Next comes the accommodation industry, with a share of 14 per cent.

Even more people working in tourism



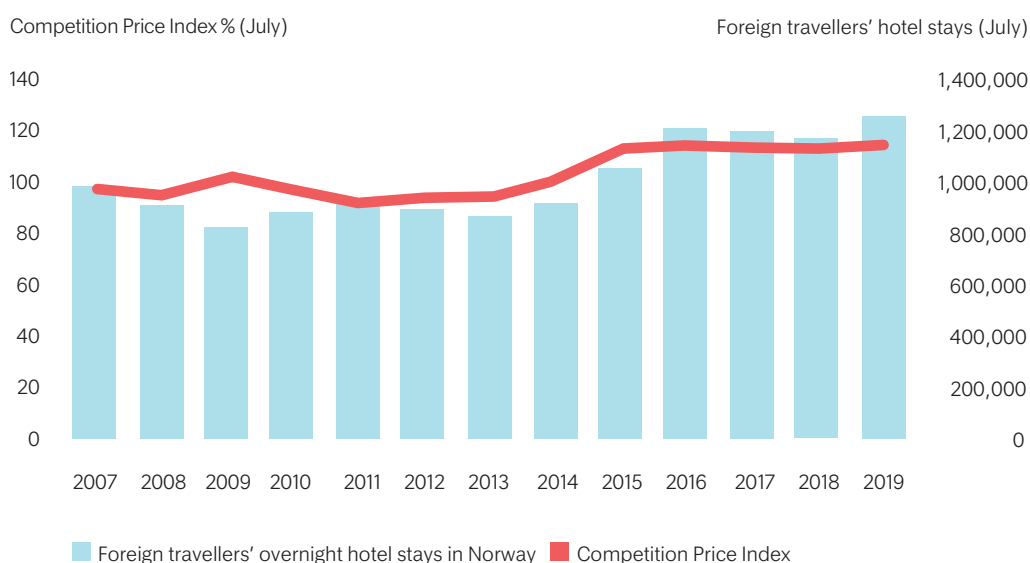
A weakened exchange rate

In recent years, the Norwegian Krone has been relatively weak against the Euro, Sterling, US Dollar, Danish Krone, and Swedish Krona. This benefits the travel and tourism industry because it is an export industry. Norway's ability to compete can be measured using the Competition Price Index. A rise in this index means a weaker Krone,

making Norway more competitive, and vice versa. The weaker the Krone exchange rate, the more competitive Norway becomes. This means that foreign tourists get more for their money in Norway, and there is a clear correlation: a lower exchange rate leads to an increasing number of overnight stays from foreign tourists.

Development of the Competition Price Index and foreign overnight stays go together

The exchange rate makes it a little more affordable to holiday in Norway.



03 Tourism Year 2019



Another record year for world tourism

There have been 10 years of continuous growth

Figures from the UNWTO show that there were 1.5 billion cross-border trips in 2019, not including day trips. In addition, day trips are not included in the figures. This is an increase of 4 per cent from 2018, which means one million more journeys.

Tourism is defined as all activities that people participate in outside their normal place of residence, irrespective of purpose. This means that tourism includes all trips, both holiday trips and business travel.

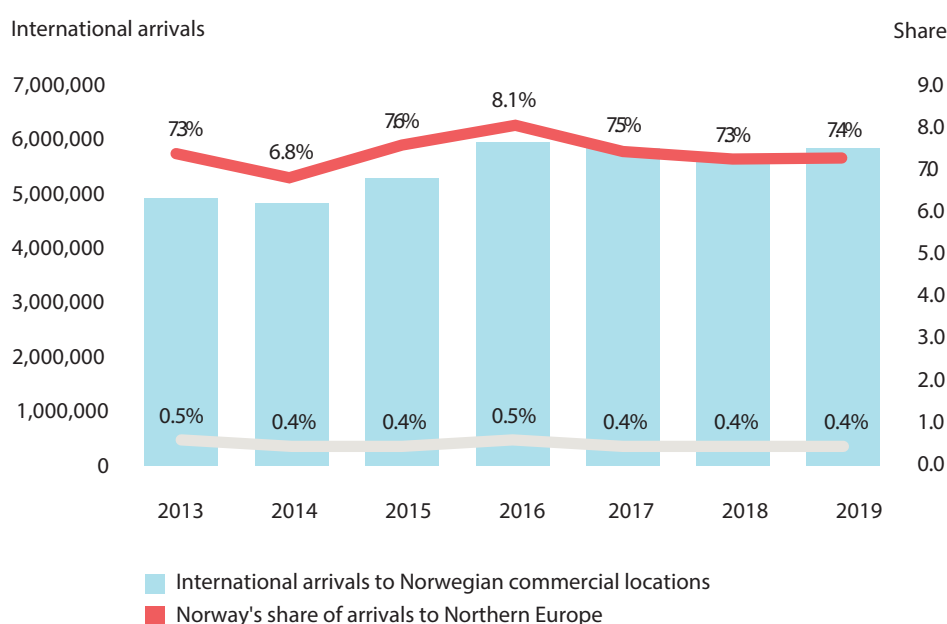
Lower international growth than expected

The growth of 4 per cent was lower than expected. The year was marked by uncertainty around Brexit, concern about the world's stock exchanges, social unrest in Hong Kong, and a trade war between the US and China. It was also the year that Thomas Cook and several low-cost airlines in Europe went bankrupt.

Travel to Norway increased by 3 per cent in 2019, and because travel to Northern Europe did not increase by more than 1.5 per cent, Norway's share of travel to the region increased from 7.3 per cent in 2018 to 7.4 per cent in 2019. Norway's share of all inbound travel in the world was 0.4 per cent.

Foreign arrivals at commercial locations and Norway's market share in Northern Europe and the world

Cross-border travel with a minimum of one overnight stay



Europe is the most visited

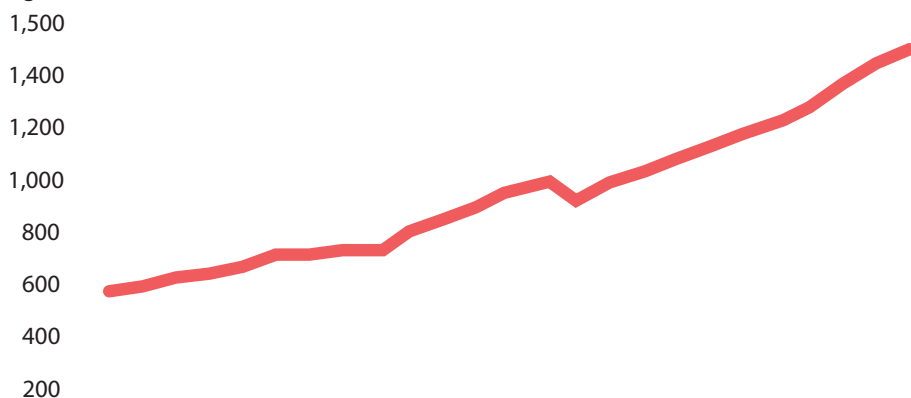
Europe, which accounts for more than half of all arrivals, is still the most visited continent. That is how it has always been, but its market share is falling. In 2019, Europe's market share was 51 per cent, while in 1980 it was 63 per cent.

There were 1.5 billion cross-border trips with at least one overnight stay in 2019.

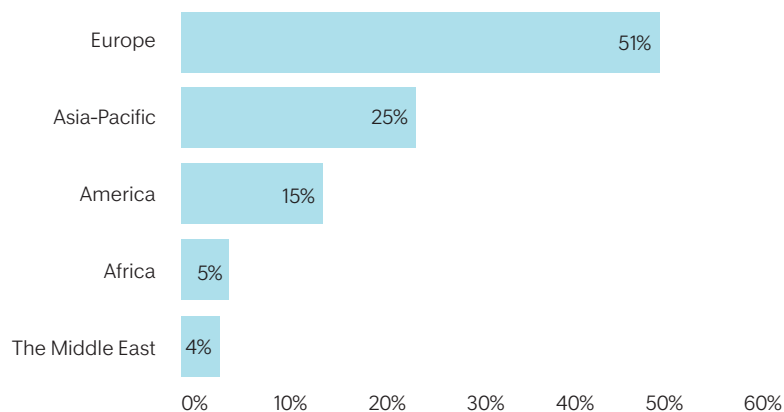
New record for global tourism

International tourist arrivals with at least one overnight stay

Figures in millions

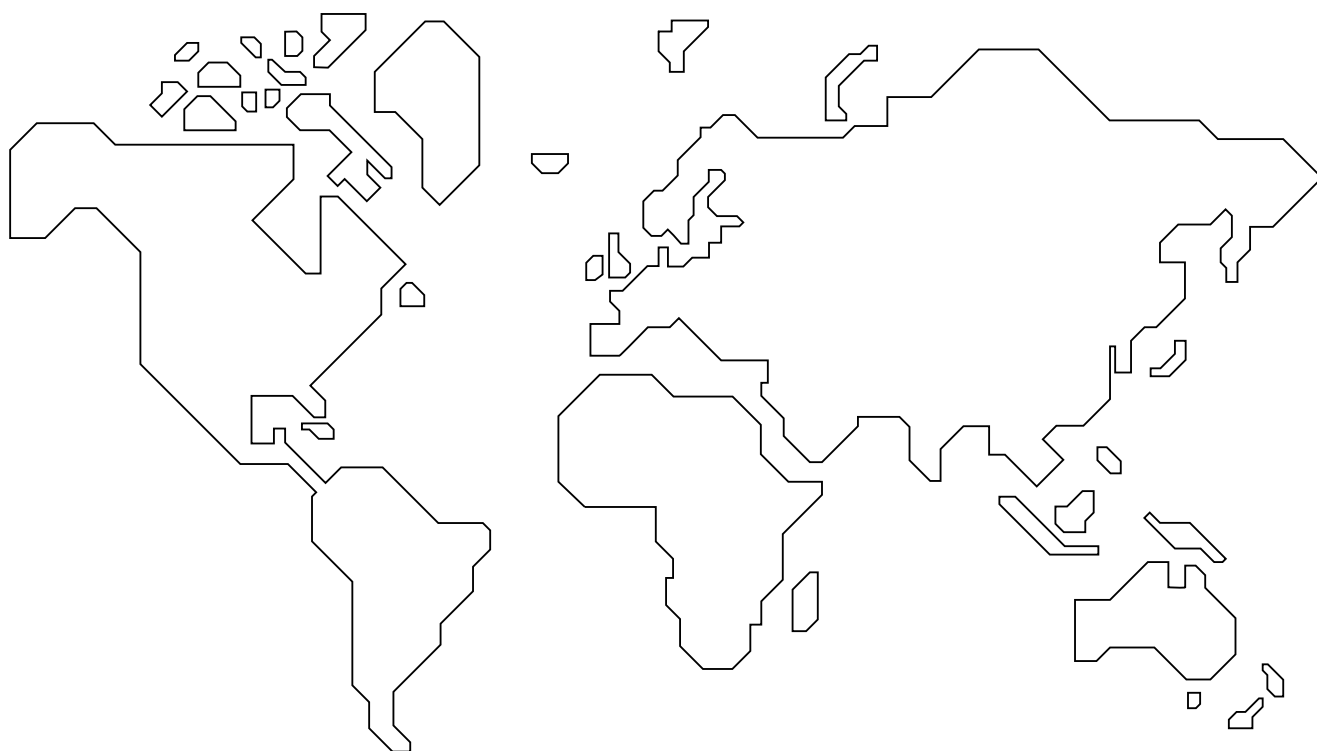


Breakdown of international tourist arrivals

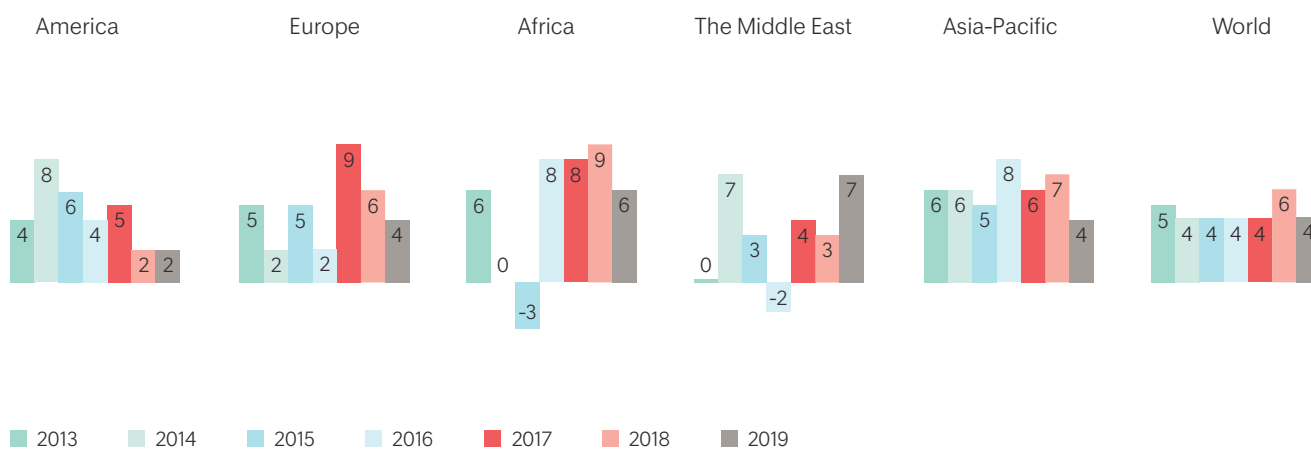


Changes in the number of tourist arrivals globally

Tourist arrivals with at least one overnight stay.

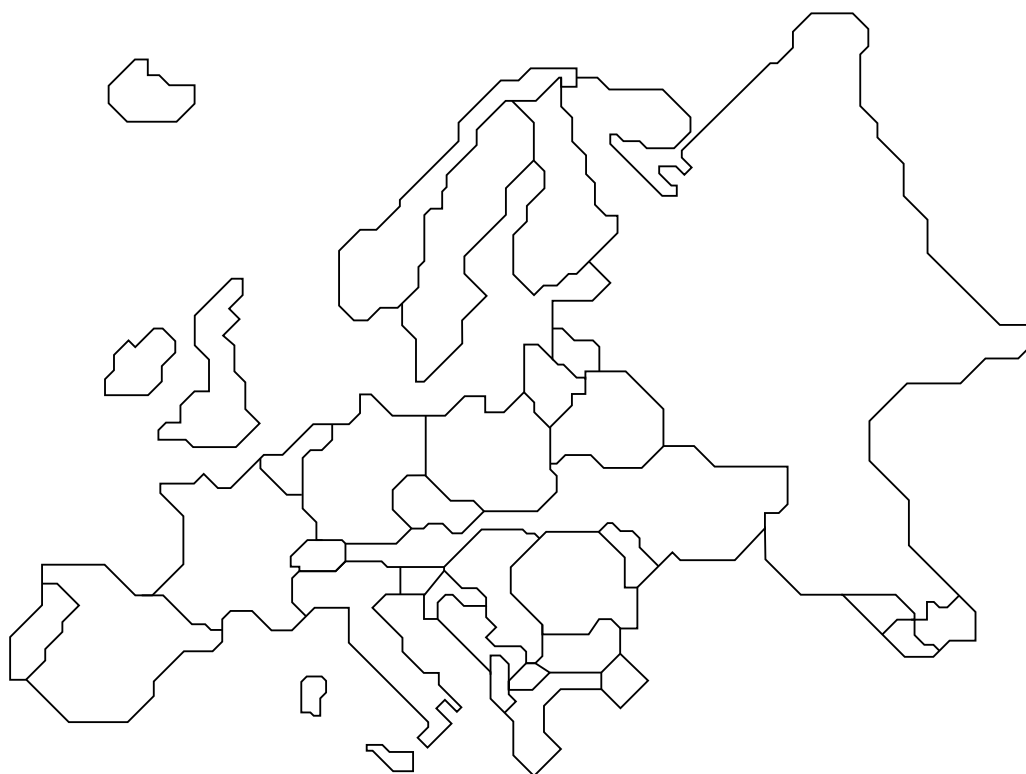


All figures in %

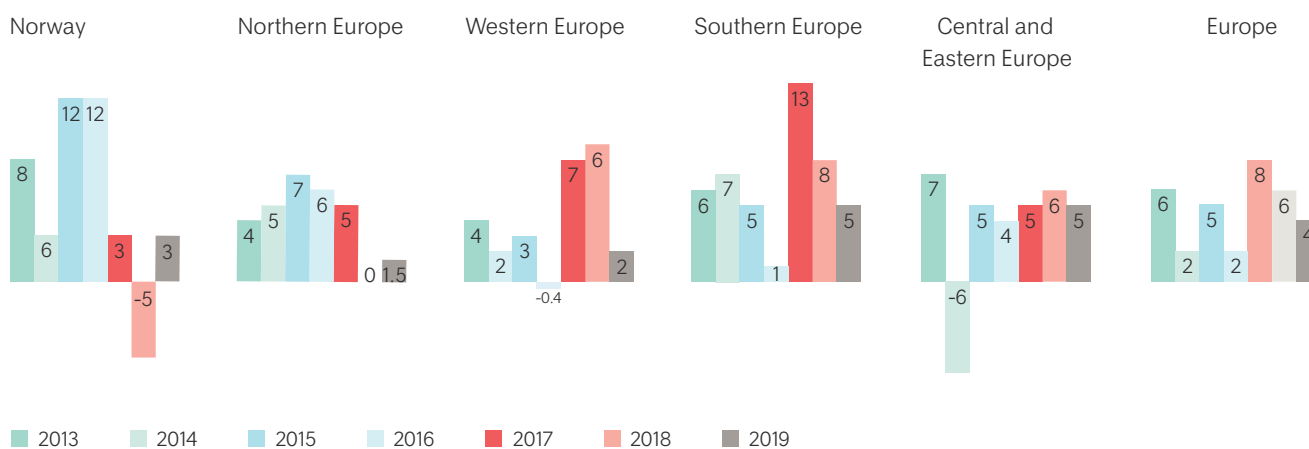


Changes in the number of tourist arrivals in Europe and Norway

Tourist arrivals with at least one overnight stay.



All figures in %

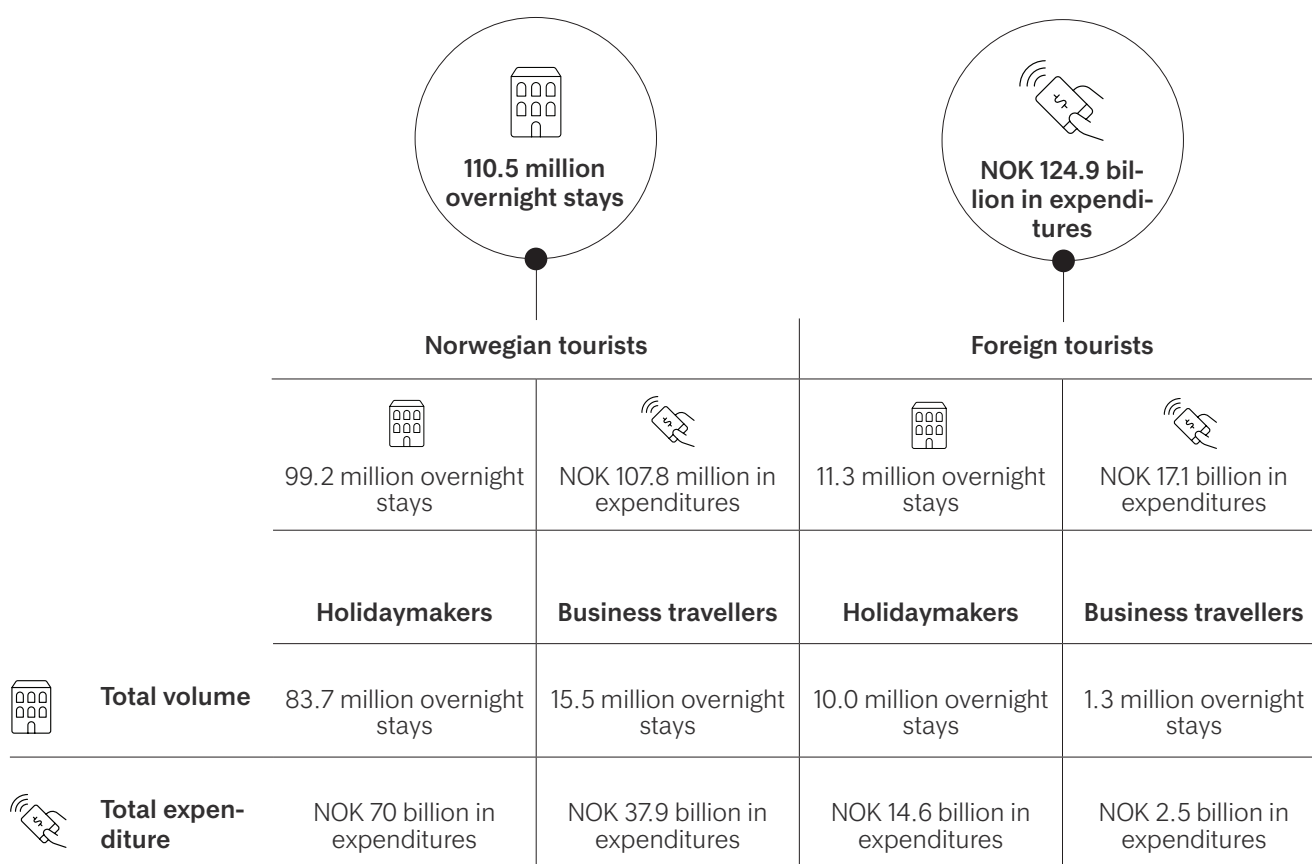


Number of overnight stays and expenditure in 2019

Norwegians account for the most overnight stays and the highest expenditure

During 2019, there were 110.5 million registered overnight stays in Norway and a total expenditure of NOK 124.9 billion. Norwegians accounted for 90 per cent of the overnight stays and 86 per cent of the expenditure. Many of the Norwegians' overnight stays can be attributed to visits from friends and family and trips to their own cabins.

The number of overnight stays in Norway is based on Statistics Norway's Accommodation and Intermediaries of Cabins Statistics, the Norwegian Travel Habit Survey (RVU), Avinor's Air Travel Survey, and the Tourism Survey.



Source:

The Tourism Survey, Innovation Norway

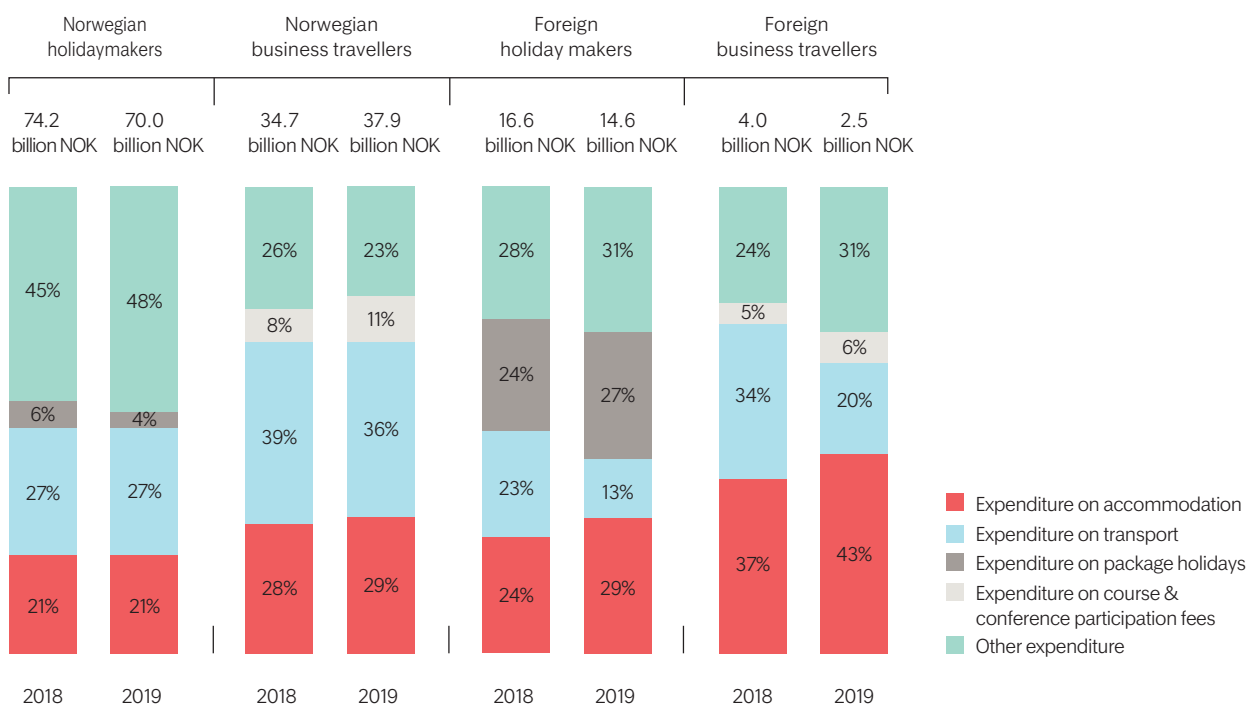
Consumption slightly decreased in 2019

Consumption has decreased among both Norwegian and foreign holidaymakers compared to 2018. This was also true for foreign business travellers. Norwegians, on the other hand, spend more money on business trips in Norway. Expenditures among Norwegians on holiday in their own country decreased from NOK 74.2 billion in

2018 to NOK 70 billion in 2019. The decrease corresponds to NOK 4.2 billion. Norwegian business travellers had an increased expenditure of NOK 3.2 billion. Here, more was spent on accommodation and more went to course & conference participation fees.

Distribution of expenditure

Total expenditure in Norway



Overnight stays and expenditures by foreign holidaymakers

There were a total of 10 million overnight stays for leisure by foreign travellers, with an expenditure of NOK 14.6 billion for their Norwegian holidays.

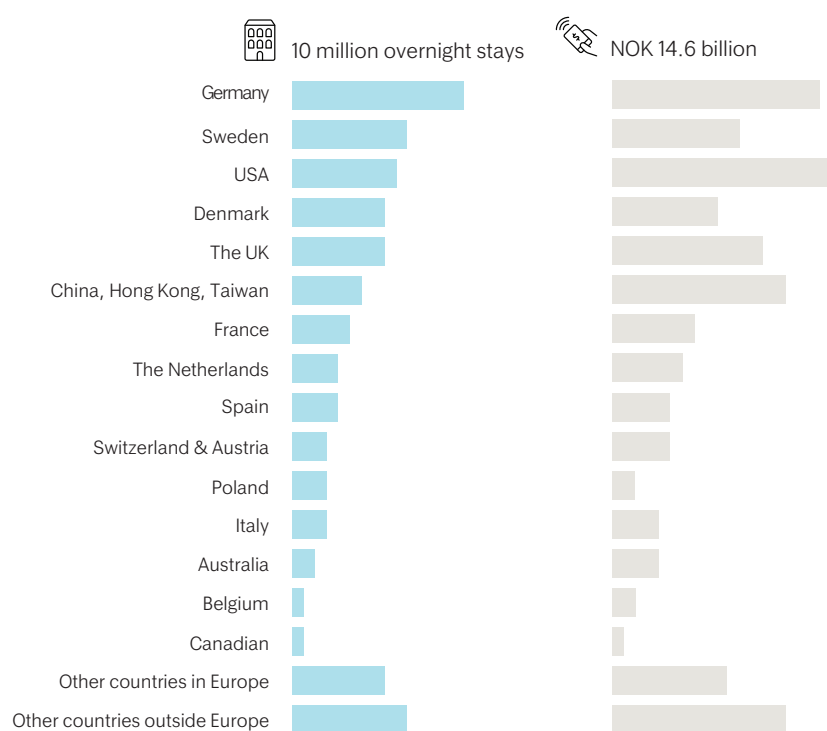
The total expenditure is calculated based on the number of nights and the average daily expenditure per person (per market).

Germany is the largest holiday market

There were 1.5 million overnight stays by Germans for leisure, with an expenditure of NOK 1.8 billion in 2019. Sweden and the US followed in the number of overnight stays. However, Americans had a higher average daily expenditure than Germans, with the total

contribution from Americans being NOK 1.9 billion. Visitors from China, Hong Kong, and Taiwan stand out for having a high average daily expenditure. There were no more than 600,000 overnight stays in total from these markets, but the expenditure was NOK 1.5 billion.

Per market



Source:

The Tourism Survey, Innovation Norway

Holiday markets' financial contributions

There are several important markets for Norwegian tourism.

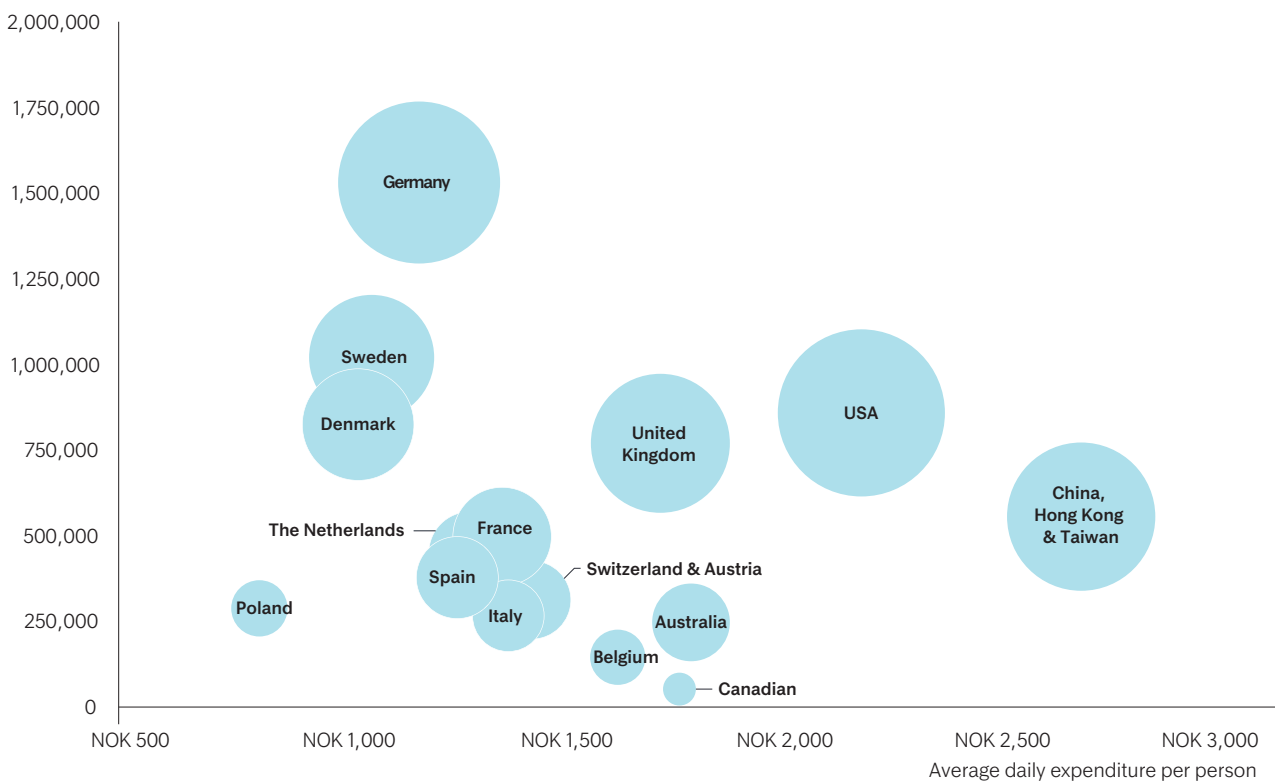
Some are important because many tourists come from there, meaning that there is also a large financial contribution. From other markets, there are fewer tourists, but a high daily expenditure, so Norway still benefits from tourists from these markets.

As shown on the previous page, Germany is an important market. This is primarily because there are many German tourists who are here for many days. The US is another important market, but this is more due to a high daily expenditure per person.

The total expenditure of the holiday markets in Norway

The size of the circle show the market's total financial contribution

Overnight stays



Source:

The Tourism Survey, Innovation Norway

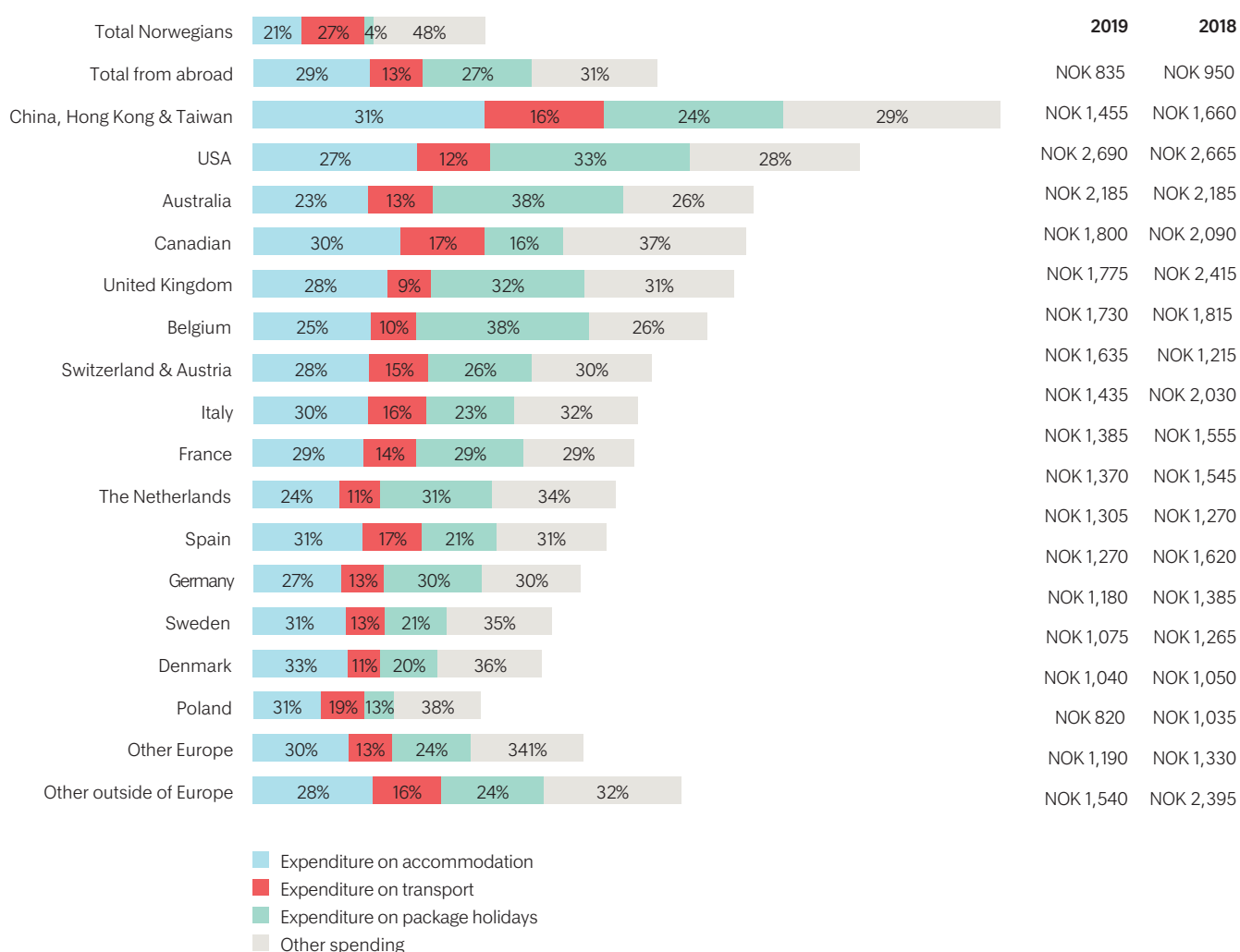
Foreign holidaymakers have a higher daily expenditure than Norwegians

The average daily expenditure for a foreign holidaymaker is NOK 1,455, while for a Norwegian holidaymaker it is NOK 835. The difference amounts to NOK 620 per person per day.

The vast majority of foreign holidaymakers have a higher daily expenditure than Norwegians (with the exception of Poles), but there are big differences. Nearby markets have consistently lower expenditures in Norway compared to those who have travelled a long way to experience the country. At the top of the list with the highest daily expenditures are travellers from China, Hong Kong, Taiwan, the US, Australia, and Canada.

The chart *overleaf* shows what tourists on holiday in Norway spend on goods and services that aren't prepaid in a package holiday and what they spend on accommodation and transport.

Average daily expenditure per holiday market



The vast majority travel with another person

There are no great differences in the size of the travel party between the holiday markets

The average number of those travelling together in a party is two, both for Norwegian and foreign holidaymakers. There are minor variations between the foreign markets, with holidaymakers from Denmark having a bigger party size than, for example, Sweden.

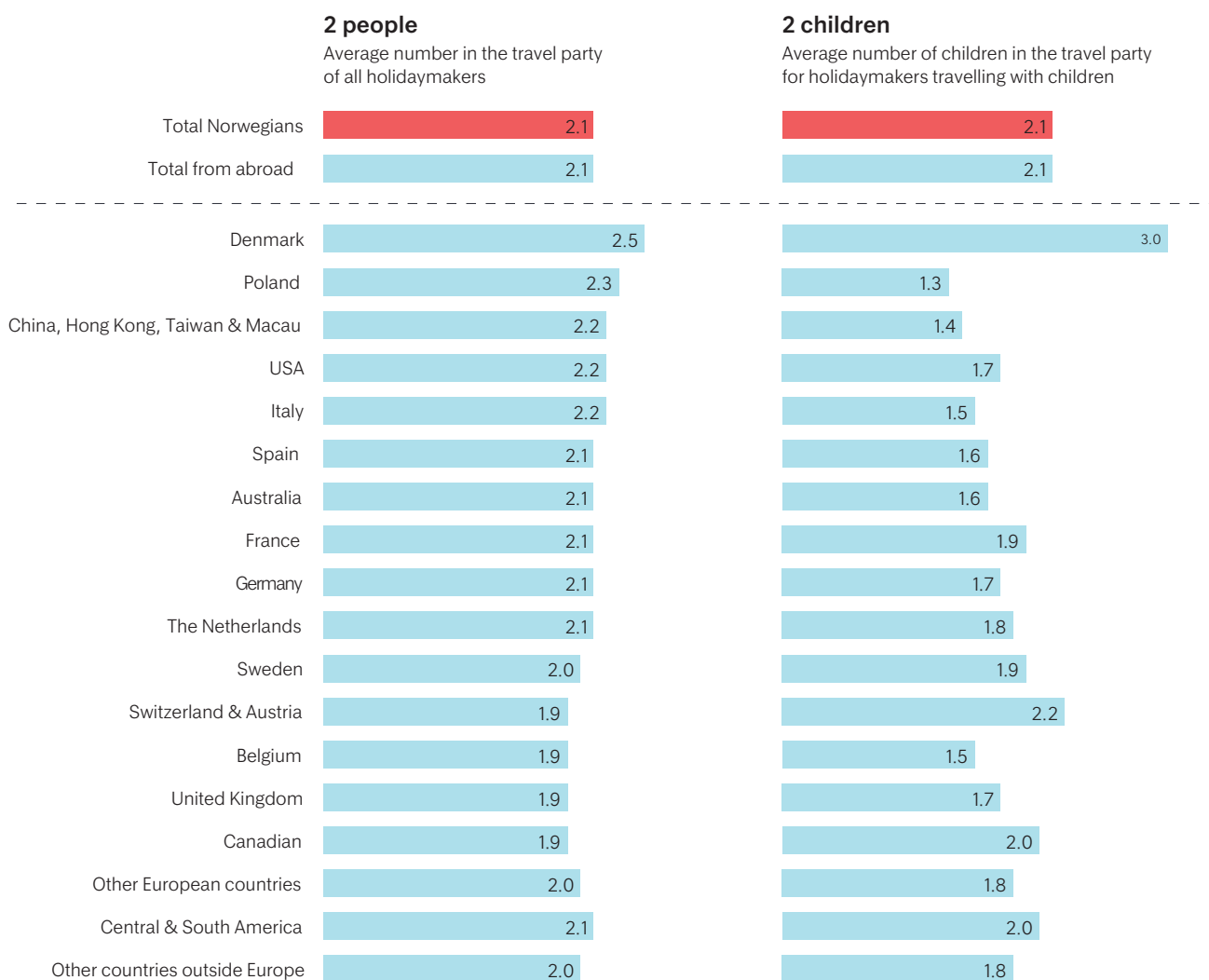
There are some big differences when it comes to the number of children travelling in the group

Although the average number of children under 18 in the travel party is generally similar between Norwegian and foreign holidaymakers, there is a difference between the foreign holiday markets.

See graph on the next page.

There are not many foreign families with children coming to Norway on holiday, other than those who come on a skiing holiday. Only 13 per cent of all foreign holidaymakers have children under the age of 18. Among foreign ski tourists, the share is 33 per cent.

Average number in the travel party and children under 18



Foreign tourists are on holiday twice as long as Norwegians

Foreign holidaymakers have significantly longer holidays than Norwegians, and the variations are large between the holiday markets.

An average holiday in Norway lasts a week

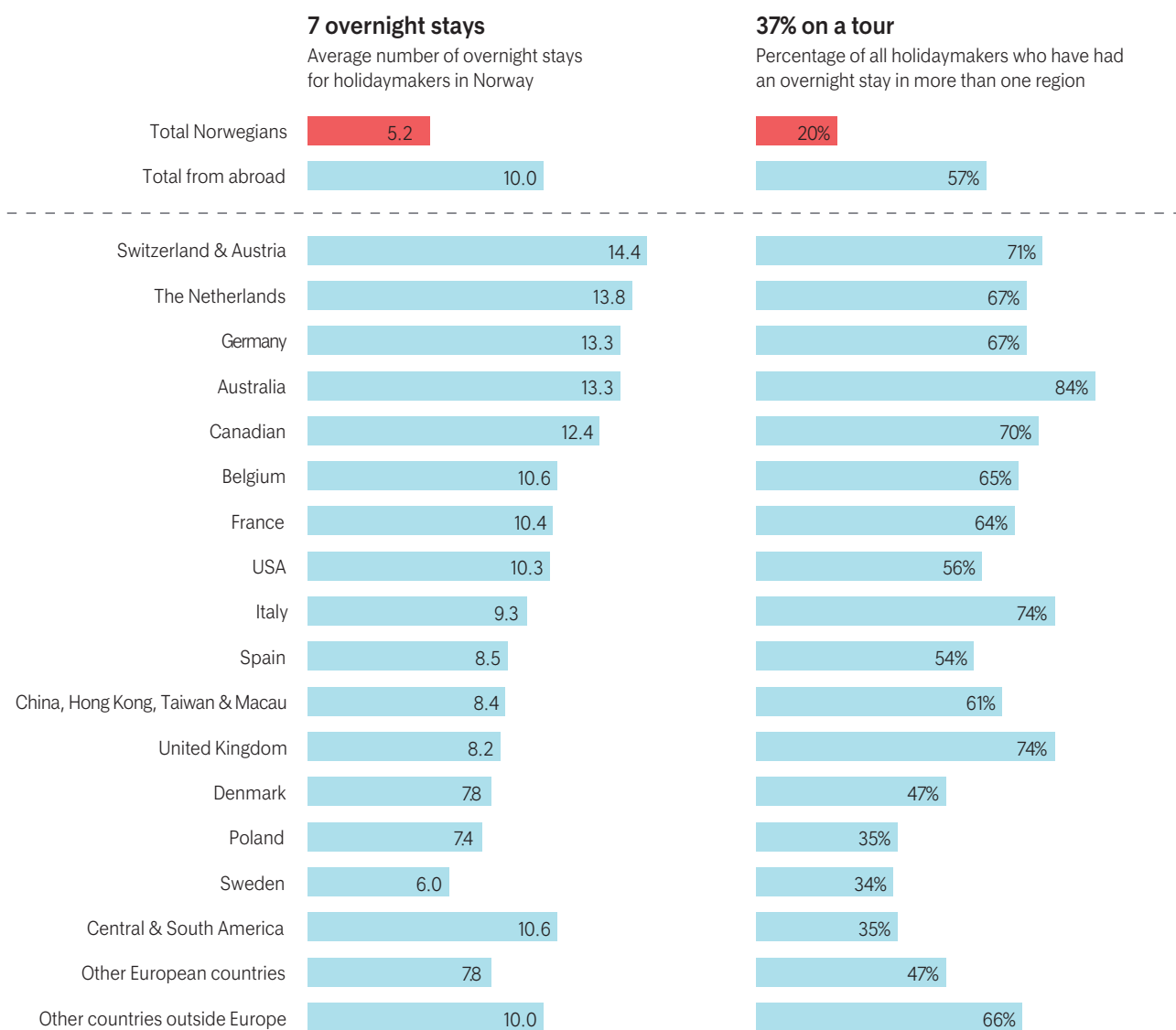
Foreign holidaymakers stay for an average of 10 nights, while an average holiday in Norway for Norwegians is 5 nights.

There are large differences between the different foreign markets. Holidaymakers from Sweden are here for an average of 6 nights, while travellers from Switzerland and Austria are here an average of 14.4 nights.

Over a third of the holidaymakers visit more than one region

Around one fifth of Norwegians and more than a half of foreign travellers visit more than one region. Foreign tourists are much more likely to travel around Norway, and they stay in the country the longest.

Average number of overnight stays and percentage of tours



It is not uncommon to combine different types of accommodation

Several of those who stay with friends or family, or stay in an Airbnb, also stay in a hotel during their holiday

It is not the case that visitors only take advantage of one type of overnight accommodation during their holiday in Norway. It turns out that many combine different types of

overnight accommodation during their trip. For example, around a quarter of foreign tourists who stayed with friends or family also stayed in a hotel. Similarly, 36 per cent of those who had overnight stays in an Airbnb also had overnight stays in hotels.

Combination of several types of accommodation for holidays in Norway

Have had at least one overnight stay at:

Share who have also stayed at:



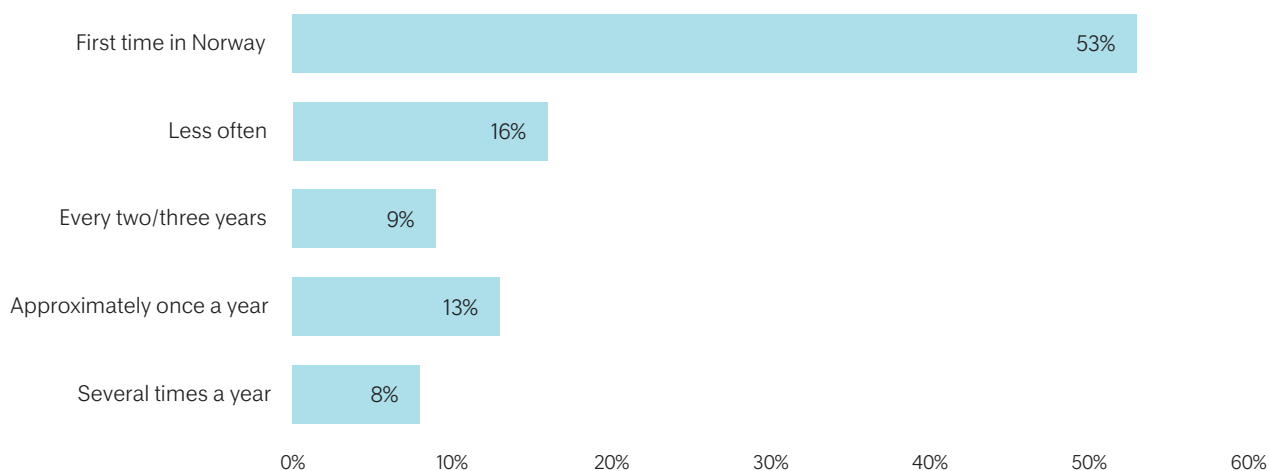
Note: Accommodation presented as camping covers three forms of camping: camping at a campsite, wilderness camping, and camping cabins.

A little over half were in Norway for the first time

For a holiday destination, it is natural for the country to have a good mix of first-time visitors and tourists who return year after year. In 2019, 53 per cent of all foreign holidaymakers were here for the first time. This means that 47 per cent had been here before. Among those who had been here previously, the biggest share were from Denmark, Sweden, and Germany.

Among those who visit us often, it is the Danes, Swedes, and Germans who are loyal friends of Norway

Percentage who had previously been on holiday in Norway

**Source:**

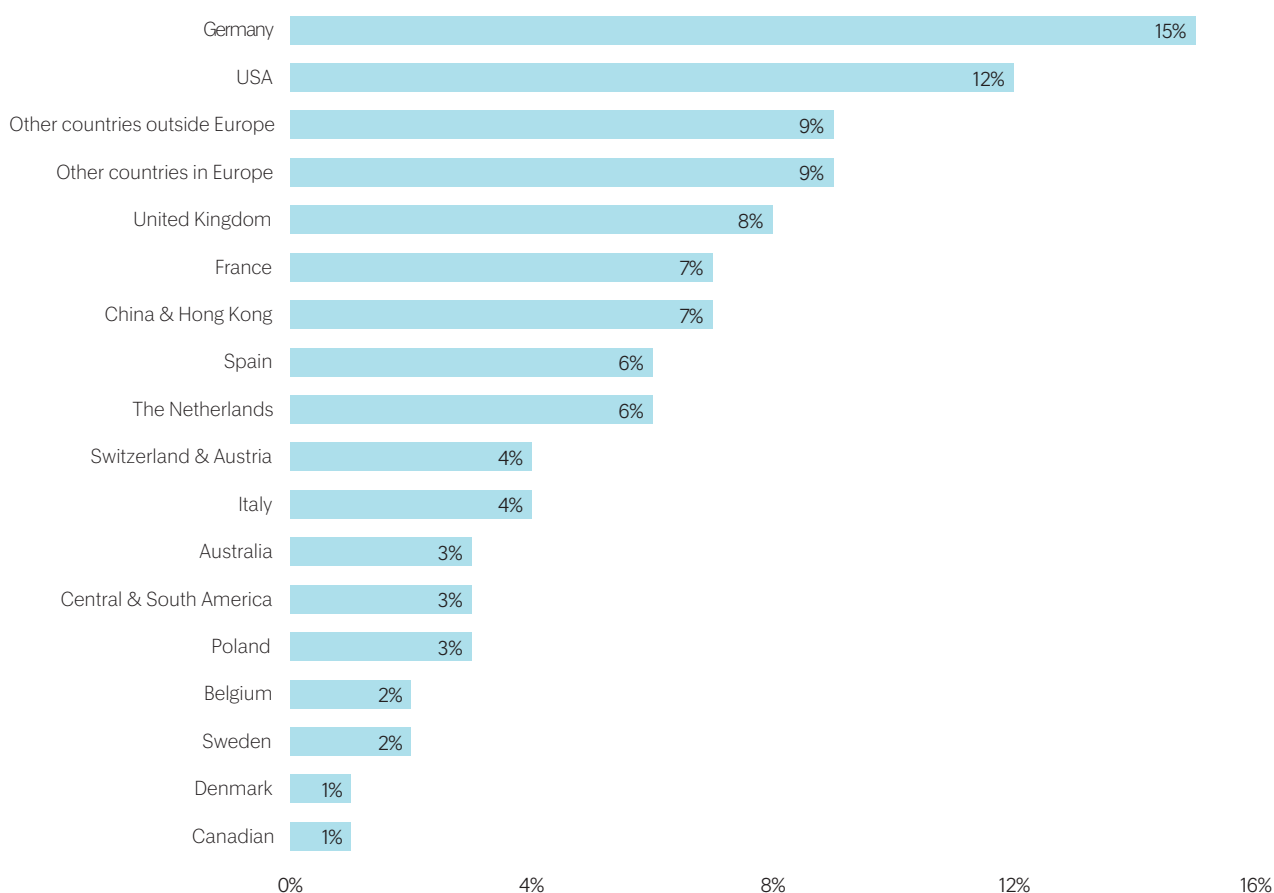
The Tourism Survey, Innovation Norway

Most first-time visitors are from Germany and the US

Among those who were on holiday in Norway for the first time, a majority of them were Germans, followed by Americans. 73 per cent of all American tourists were in Norway for the first time. This also characterises other

overseas markets, where a holiday to Norway is a once-in-a-lifetime trip. In 2019, many Italians and Spaniards were in Norway for the first time too.

Share of first-time visitors 2019



Source:

The Tourism Survey, Innovation Norway

What sets each region apart?

There are quite large regional variations when it comes to the number of visitors, how much money they spend there, and their satisfaction with their holiday experience. Whether they experienced a degree of overtourism during their stay also differs.

Fjord Norway and the Oslo region are the most visited

This is particularly true for foreign tourists, with 53 per cent of these visiting Fjord Norway and 52 per cent visiting the Oslo region. The same trend is found again among Norwegian holidaymakers. A quarter of these visit Fjord Norway, and around a fifth visit the Oslo region. Nevertheless, it is Eastern Norway (excluding Oslo) that is the region with the highest number of Norwegian overnight stays during the year. The circles show the proportion of overnight stays, and they indicate that foreign

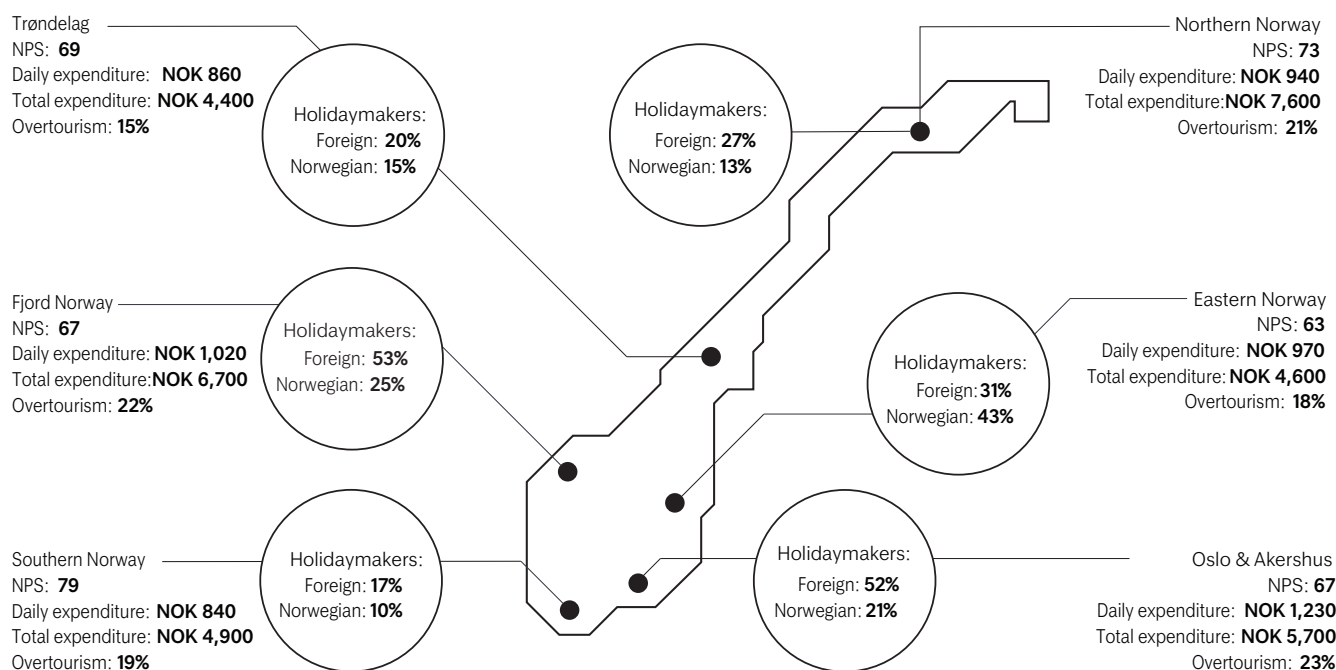
holidaymakers are increasingly travelling around Norway with overnight stays in several regions.

Tourists spend the most money per holiday in Northern Norway, with an average expenditure of NOK 7,600.

The average daily expenditure in Northern Norway is lower than in both Oslo and Fjord Norway, but because tourists spend more days in the region, the total is higher.

The tourists in Southern Norway are the most likely to highly recommend a holiday in the region (NPS 79), and it is visitors to Oslo and Fjord Norway who experienced overtourism to the greatest extent. In Oslo, 23 per cent experienced overtourism, as did 22 per cent of visitors to Fjord Norway.

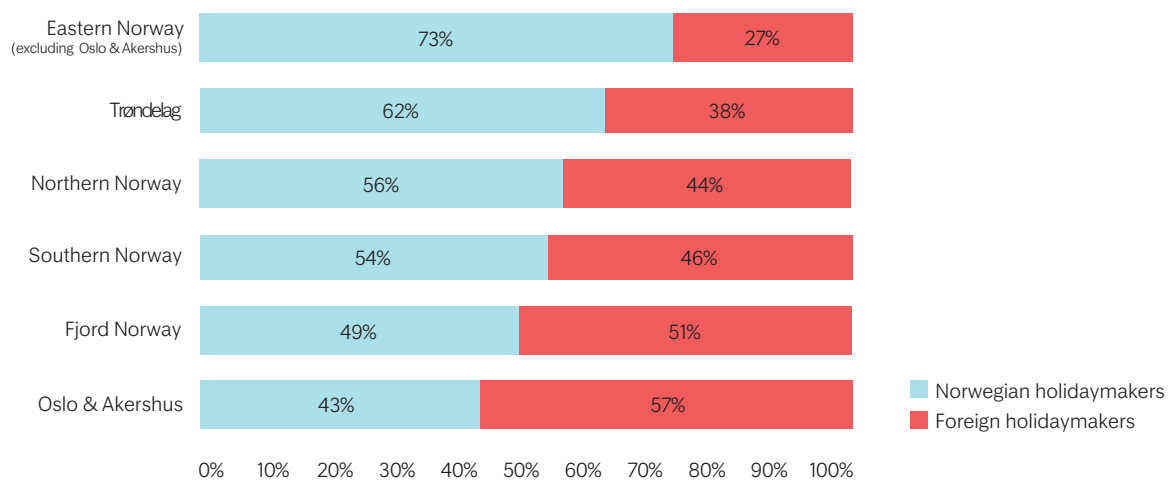
The circles show the proportions of tourists who had one or more overnight stays in the region



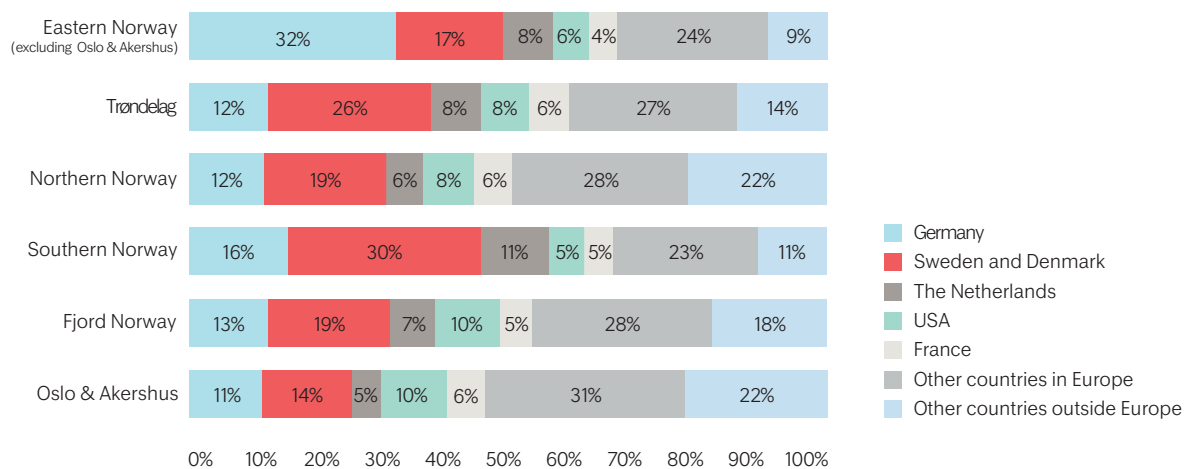
Source:

The Tourism Survey, Innovation Norway

Percentage of Norwegian and foreign holidaymakers by region



Percentage of foreign holidaymakers by region in the largest foreign markets



Source:
The Tourism Survey, Innovation Norway

Mode of transport to and in Norway

Many foreign holidaymakers come to Norway by air, but far fewer take flights to get around the country.

It is common to combine several different means of transport while travelling to and around Norway

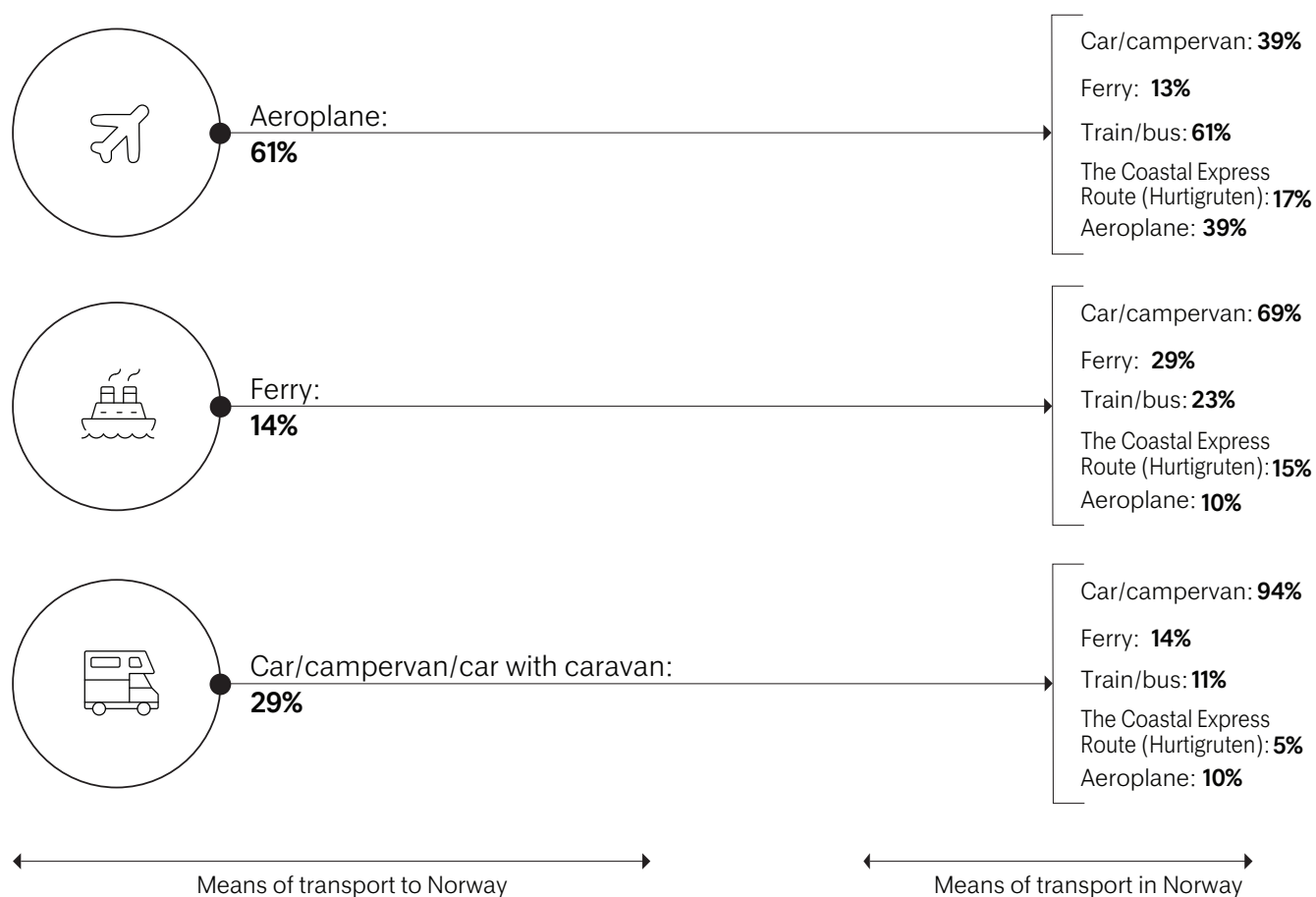
The figures on the next page show the usage of different transport to Norway sorted into plane, ferry, car/campervan, or car and caravan. 61 per cent of foreign travellers arrive in Norway with air travel as the primary means of transport, but only 40 per cent of them travel further in the country by plane. In fact, there is a larger share who travel farther by train or bus among those who

arrive by air. Just under a third of foreign holidaymakers travel to Norway by car/campervan or with a car and caravan. Of these, as expected, most travel farther in Norway with the same means of transport. This also applies to around 70 per cent of those who come to Norway by ferry.



Overview of means of transport used to and in Norway by foreign holidaymakers

Means of transport to and in Norway



Only a selection of means of transport are shown in the figure for the sake of clarity.
 Please note that it is possible to choose more than one means of transport in the question.
 The question is formulated as follows: Which means of transport have you primarily used/will primarily use while you are in Norway?

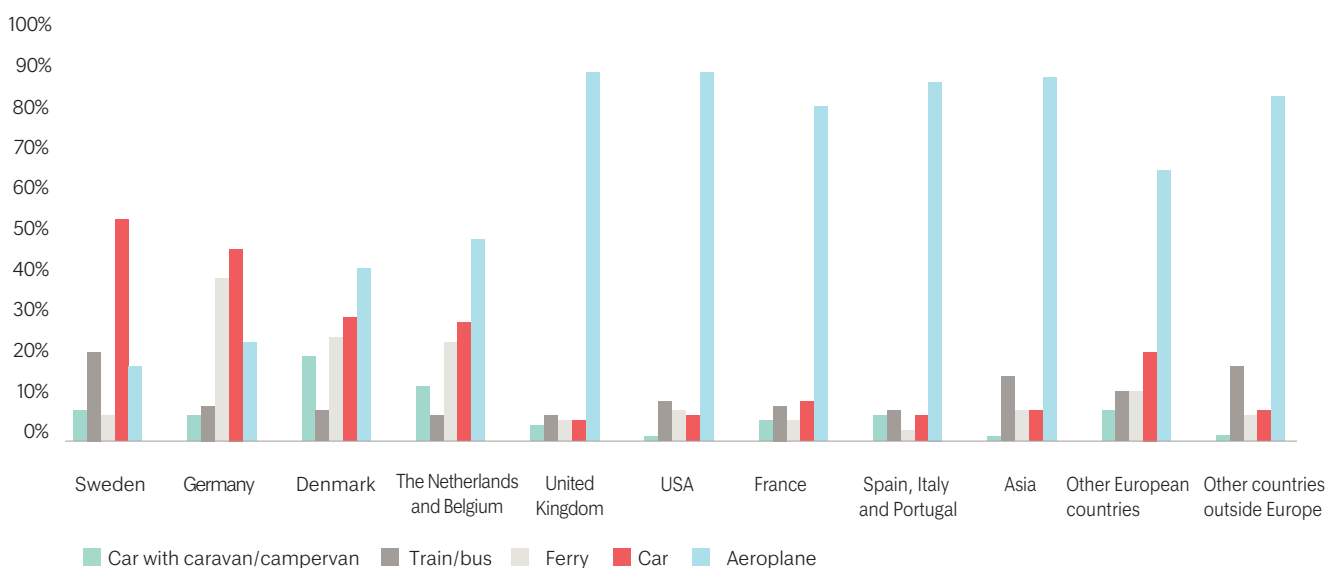
Holidaymakers from closer markets to a greater extent travel by car

Aeroplanes are the most-used mode of transport to Norway for foreign travellers. Naturally, this varies between the markets, and holidaymakers from closer markets use the car as a means of transport to Norway to a greater degree.

Germany, the Netherlands, and Belgium stand out

There is a significantly greater spread in the use of different types of means of transport between German, Dutch, and Belgian holidaymakers. There is a greater share who travel by air than those from Denmark and Sweden. At the same time, there is a large share who arrive by car (either with or without a caravan) or take a ferry.

Mode of transport to Norway by foreign holiday markets

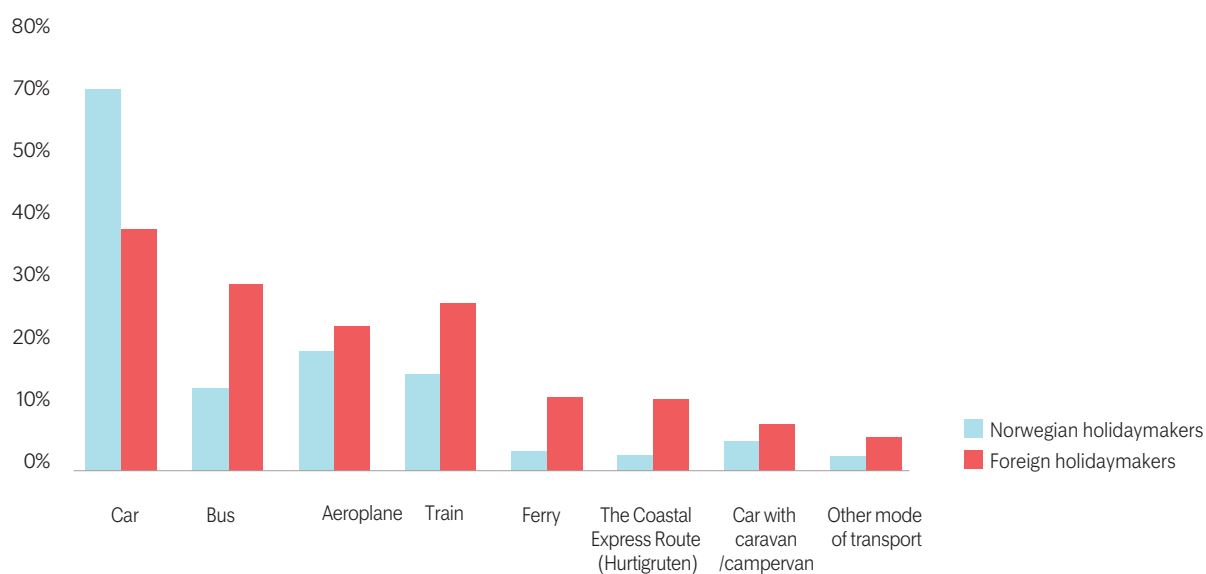


Norwegians mainly use a car

70 per cent of Norwegian holidaymakers travel around Norway by car, while the corresponding share for foreign travellers is 45 per cent. There is greater variation in the use of means of transport among foreign tourists.

Many come to Norway by air and then choose other means of transport during their stay. For example, 34 per cent take the bus, and 31 per cent travel by train.

Holidaymakers' choice of transportation for their journey to Norway



Another record number of commercial overnight stays

In 2019, there were 35.2 million overnight stays in commercial accommodations. This is an increase of 4 per cent, which means 1.4 million more overnight stays compared to 2018. The number of overnight stays for Norwegians increased by 3 per cent and for foreign travellers by 6 per cent.

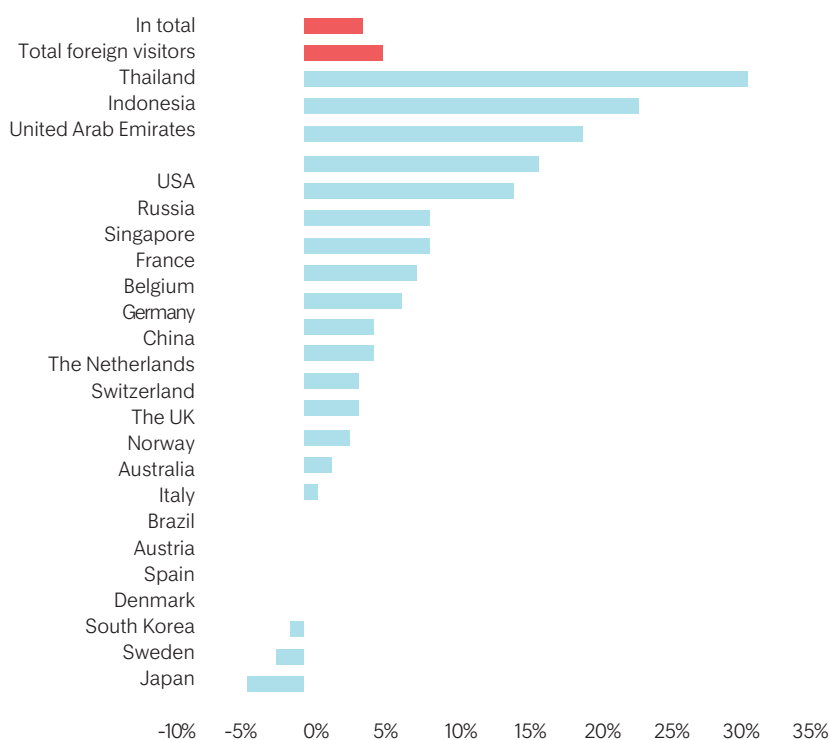
Positive development in the number of visitors from 2014 to 2019

The period after the financial crisis in 2007 was tough for the Norwegian tourism industry. The economic downturn affected many of our main markets, while the Norwegian krone exchange rate made it expensive to holiday here.

This started to change in January 2014, and since then there has been continuous growth up until March 2020. Unfortunately, the growth was not equal around the country. Fjord Norway, the Oslo region, and Northern Norway had the largest growth.

Germany, Sweden, the US, and Denmark are the largest foreign markets for Norwegian tourism. Germany has been at the top for a long time. In 2019, Germany was the market that spent the most money in Norway and was where most first-time visitors were from.

Percentage change in 2019



Source:
Statistics Norway

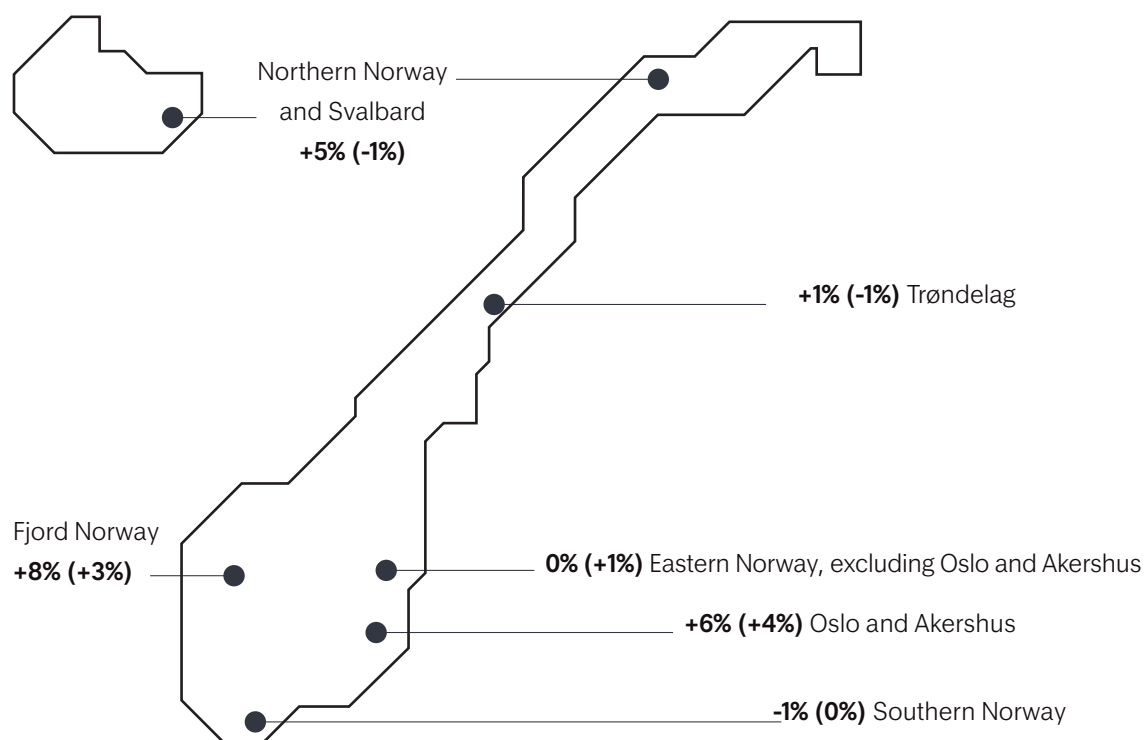
Commercial overnight stays

The table is sorted by the largest share in 2019

	2007	2010	2013	2016	2017	2018	2019	Share in 2019	Change 2018–2019	Change 2007–2019
In total	28,663,930	28,540,497	29,243,016	33,114,132	33,296,767	33,812,674	35,179,554	100%	4%	23%
Norway	20,338,157	20,637,311	21,551,330	23,387,248	23,348,139	23,684,456	24,478,073	70%	3%	20%
Total foreign visitors	8,325,773	7,903,186	7,691,686	9,726,884	9,948,628	10,128,218	10,701,481	30%	6%	29%
Germany	1,703,050	1,637,206	1,309,550	1,687,582	1,725,066	1,830,027	1,955,111	18%	7%	15%
Sweden	912,915	958,838	999,339	1,189,888	1,168,554	1,126,646	1,103,425	10%	-2%	21%
USA	330,727	315,436	303,199	496,626	671,385	815,656	956,174	9%	17%	189%
Denmark	1,006,816	914,053	835,121	828,916	776,196	757,113	755,652	7%	0%	-25%
The Netherlands	873,342	799,515	519,989	658,478	716,308	735,973	773,696	7%	5%	-11%
United Kingdom	755,172	520,428	581,496	734,876	716,930	627,203	649,981	6%	4%	-14%
China	70,694	68,133	161,878	392,529	476,767	450,827	471,822	4%	5%	567%
France	291,826	318,280	285,525	372,107	382,769	414,147	451,608	4%	9%	55%
Spain	313,766	245,638	174,862	304,303	346,610	342,877	343,513	3%	0%	9%
Italy	228,275	222,540	164,254	235,288	250,876	271,612	273,372	3%	1%	20%
Switzerland	121,970	133,159	139,545	204,456	225,576	234,924	243,469	2%	4%	100%
Belgium	65,857	88,866	81,671	130,164	145,375	148,671	160,179	1%	8%	143%
Russia	130,434	172,811	211,805	105,285	123,604	133,851	154,189	1%	15%	18%
Australia	41,620	43,917	61,294	87,498	113,341	122,733	125,339	1%	2%	201%
Austria	64,536	76,045	67,776	98,760	97,424	112,046	112,522	1%	0%	157%
South Korea	40,609	38,008	57,042	88,157	120,540	104,921	104,339	1%	-1%	-14%
Japan	115,962	104,014	103,882	111,579	111,976	104,463	100,283	1%	-4%	-10 %
Thailand	n/a	n/a	n/a	n/a	n/a	40,306	53,132	0%	32%	265%
Brazil	13,847	22,882	38,999	35,582	68,167	50,485	50,726	0%	0%	n/a
United Arab Emirates	n/a	n/a	n/a	n/a	n/a	33,357	40,068	0%	20%	266%
Singapore	n/a	n/a	n/a	n/a	n/a	35,387	38,623	0%	9%	n/a
Indonesia	n/a	n/a	n/a	n/a	n/a	20,280	25,140	0%	24%	n/a

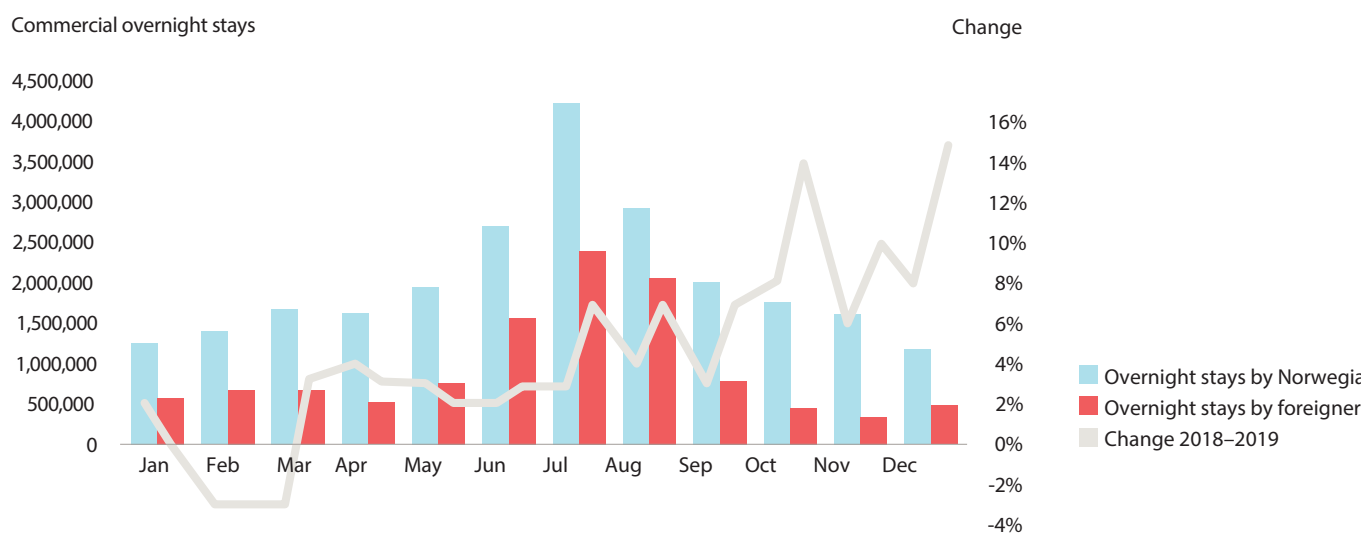
Change in commercial overnight stays per region in 2019

Figures in the brackets show the change from 2018



Distribution of Norwegian and foreign overnight stays throughout the year and change from 2018

There was good growth from abroad throughout the whole of 2019 in general. Especially from July to the end of the year.



Source:

Statistics Norway's Accommodation Statistics and Intermediaries of Cabins Statistics

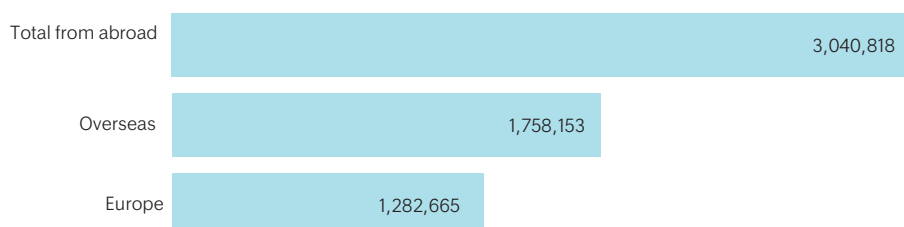
The world's population travels ever more, and more people are finding their way here

In 2005, 11 per cent of all foreign commercial overnight stays were from countries outside of Europe. Now this share is 24 per cent. So not only are there more visitors to Norway, but growth from overseas markets is greater than that from European markets.

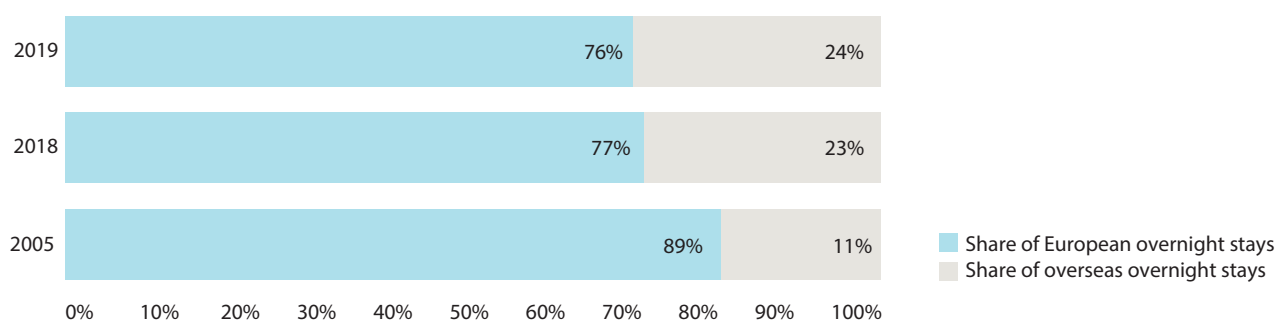
From 2005 to 2019, the number of foreign overnight stays increased by 3 million. Just under 1.8 million, corresponding to 58 per cent, are from countries outside of Europe.

The chart shows growth in overnight stays in the period 2005–2019

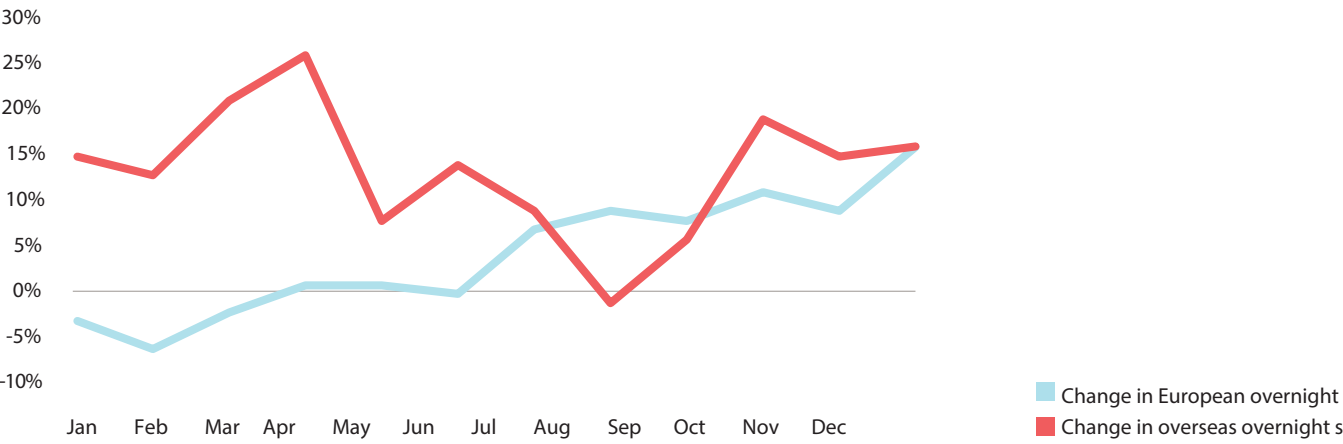
Since 2005, more than half the growth from abroad has been from countries outside Europe



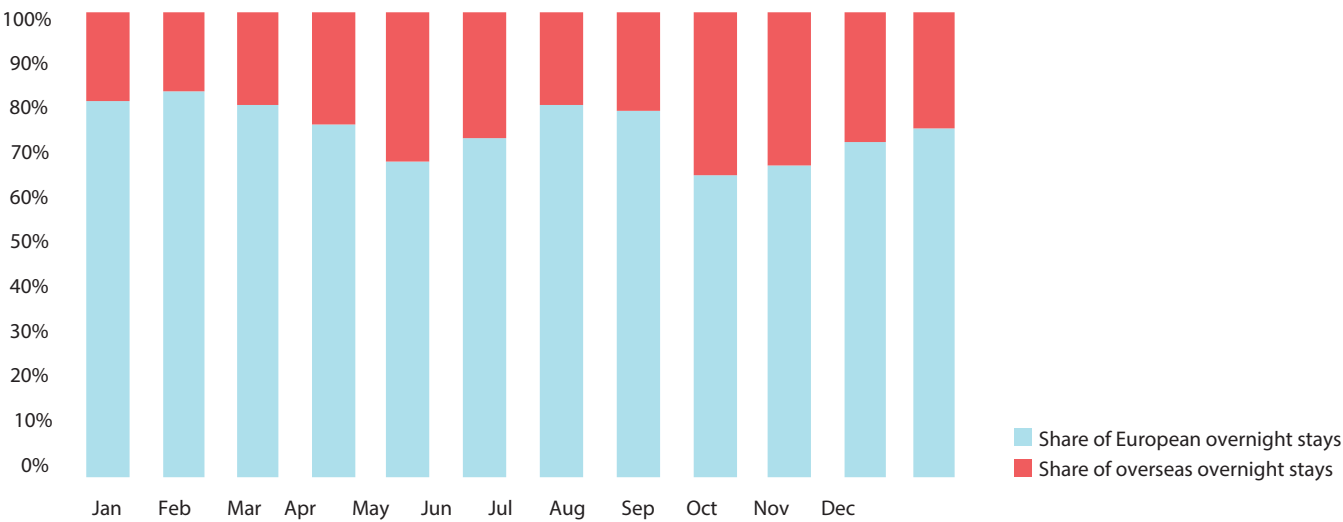
Share of foreign overnight stays, sorted by European and overseas markets



Change in European and overseas overnight stays through 2019



Share of European and overseas overnight stays through 2019



Perception of Norway as a holiday destination

Many people want to experience both nature and culture

The fact that Norway has a beautiful natural environment is well known and is taken as a given by many people. Norway holds a strong position as a nature-based travel destination. At the same time, we have managed to expand the associations of what a holiday to Norway has to offer.

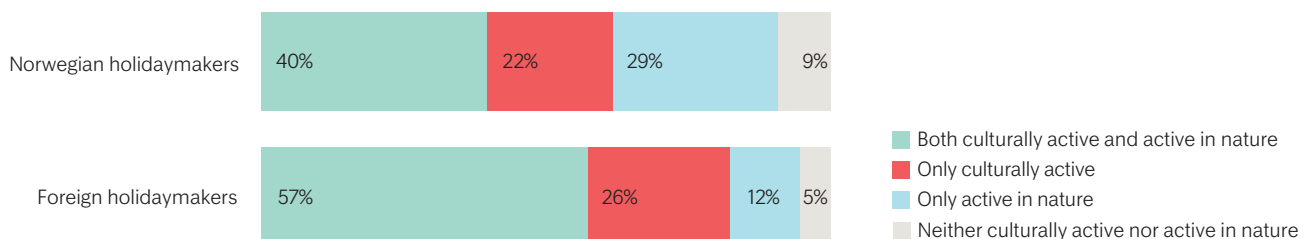
Culture and nature go hand in hand

Many tourists to Norway come to experience both culture and nature. In contrast to activities in nature, which are free in most cases and therefore lead to low expenditure, cultural activities result in increased consumption. It is precisely for this reason that the combination of

The Tourism Survey shows that visitors, who today have interests that extend beyond experiencing nature, have a greater daily consumption and are more satisfied with their holiday in Norway.

culture and nature is important. Among the foreign tourists in 2019, 57 per cent responded that both cultural experiences and experiences in nature were important for their holiday in Norway. At the same time, 26 per cent responded that they were only interested in cultural experiences. The smallest group were the foreign tourists who only came for activities in nature.

Activities considered important for a holiday to Norway



Source:

The Tourism Survey, Innovation Norway

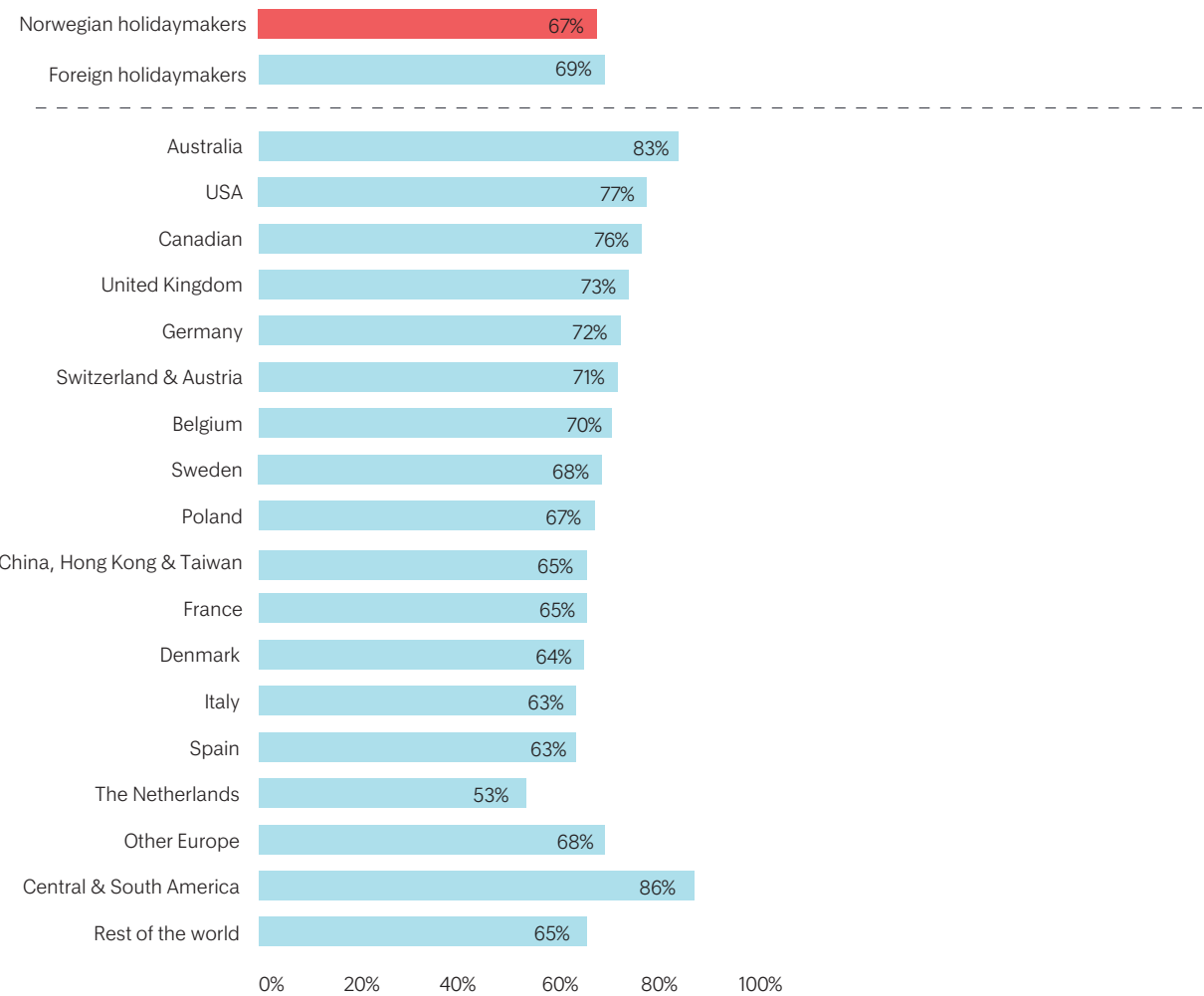
Australians and Americans are our foremost ambassadors

The Net Promoter Score (NPS) is calculated on the likelihood of recommendations from visitors on a scale of 0 to 10. Ninety per cent of our visitors answered between 7 and 10 on the question of whether they would recommend a holiday in Norway to others.

Overall this result is good, but the answers varied between markets. Australians, Americans, and Canadians were our foremost ambassadors and were those who would most strongly recommend to others to travel to Norway.

NPS across holiday markets

Net Promoter Score



What increases the likelihood of spending your holiday in Norway?

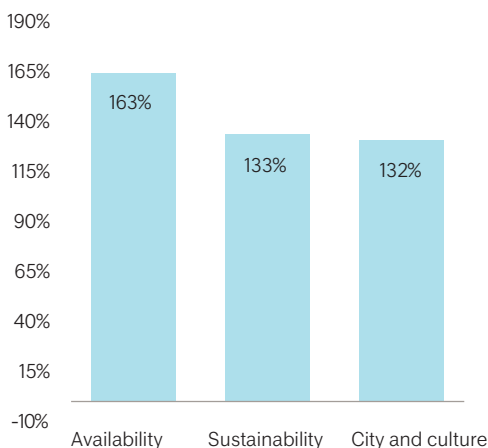
The fact that Norway has beautiful scenery is well known by many, but it is not the only reason more people are choosing to come here. The Brand Tracker shows that the most significant factors for choosing a holiday to Norway are accessibility, sustainable options, and an exciting city and cultural life.

It must be easy to travel to Norway, but also easy to travel within the country. It is a competitive advantage to show that one has access to sustainable alternatives during one's holiday and that during a holiday to Norway one can experience city and cultural offerings.

How likely is it that you will go on holiday to Norway within the next 12 months?

On a scale of 0 to 10, where 0 is that you definitely will not and 10 that you definitely will go on holiday to Norway.

Average brand efficiency in %



% = How much more likely it is that tourists go to Norway on holiday if they strongly agree with only the one brand associated with Norway as a holiday destination.

Example of interpretation:

A tourist who strongly agrees with only "City and culture" as a hallmark of Norway as a holiday destination is 132% more likely to visit Norway than a tourist who does not agree with any brand as a hallmark of Norway.

Source:

Brand Tracker, Innovation Norway

Many people take a long time to plan a trip to Norway

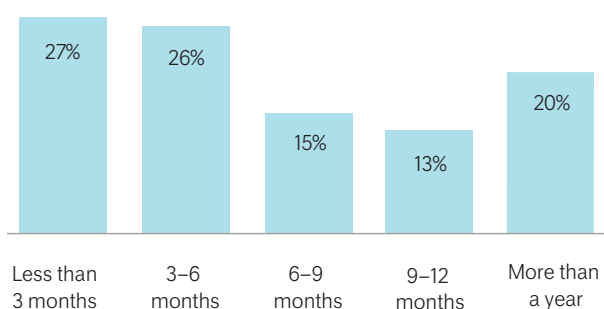
Half of the tourists plan a holiday to Norway more than 6 months before they depart

One in five of those holidaying here in 2019 had begun planning their trip a year before departure. However, many people book shortly before they travel. Although many people take a long time to consider a Norwegian holiday, 63 per cent of the tourists book the trip less than 3 months before departure.

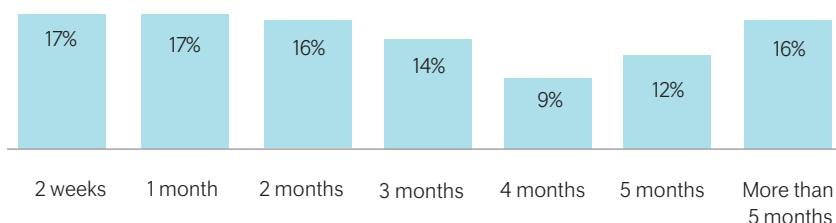
63 per cent of tourists book the trip less than three months before departure.

Planning and booking the holiday in Norway

How long before you visited Norway did you first consider this trip to Norway?



How long before departure did you book the first part of your trip to Norway?



Source:

The Tourism Survey, Innovation Norway

04 Environmental considerations



Are we changing travel patterns due to environmental concerns?

As shown on page 47, there is a competitive advantage to highlighting access to sustainable options while on holiday in Norway. In the same survey, potential tourists to Norway were asked if they want to change the way they travel due to concerns about the environment/climate.

The survey is conducted regularly in Norway, Sweden, Denmark, the UK, Germany, the Netherlands, and France. Among the respondents, most people want to change the way they travel in France, and the fewest people are interested in Norway.

At the top are France and Germany, where, respectively, 64 per cent and 55 per cent agree. At the bottom are Norway and Denmark, with 26 per cent and 33 per cent, respectively. In Sweden, 41 per cent agree with the claim.

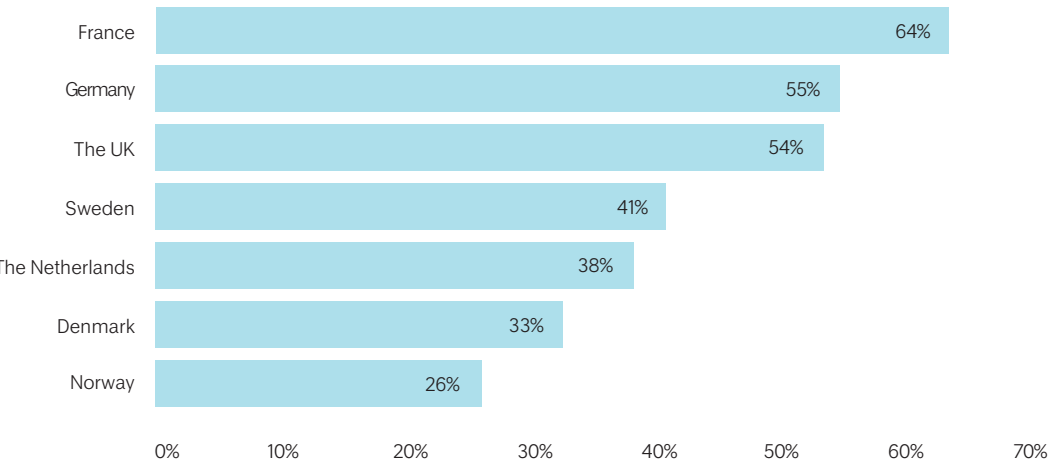
Those who want to change travel patterns received the follow-up question: "In what way do you want to change your behaviour?" Perhaps not surprisingly, travelling less by plane was high for several countries, but not in France. Only 39 per cent here said they wanted to travel less by air. Choosing destinations that take care of the local environment was the most important for tourists from France.

Few answered that they wanted to travel abroad less

Of those who answered that they wanted to change the way they travel, there were relatively few who wanted to travel abroad less. Among Norwegians, 39 per cent answered that they wanted to travel abroad less.

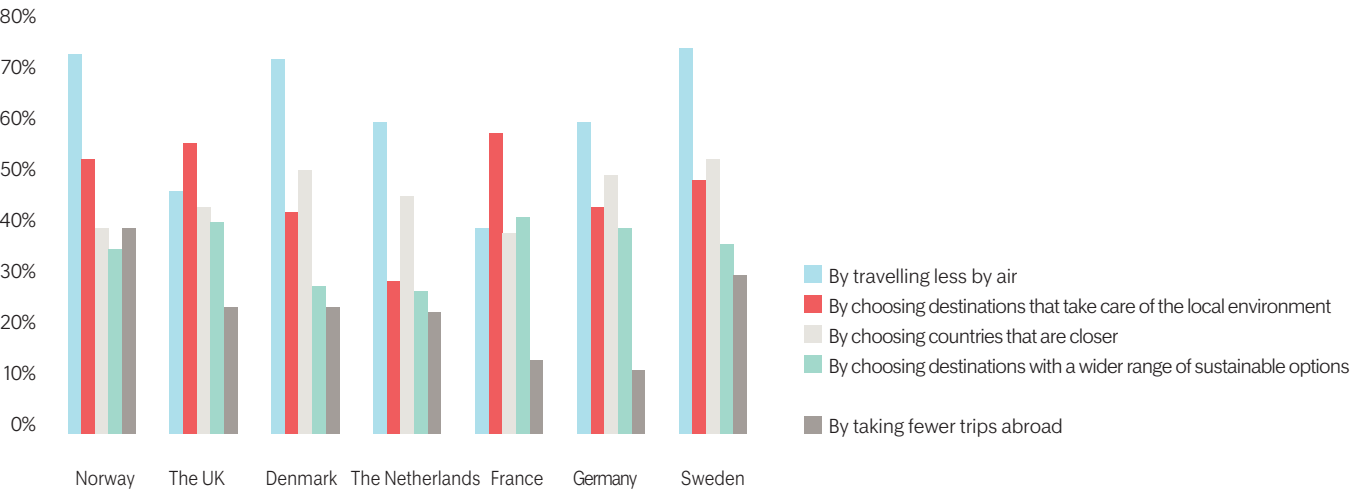
To what extent do you agree or disagree with the following statement:
I'm considering changing the way I travel due to concerns about the environment/climate

Here, the responses were either strongly agree or agree



In what ways are you considering changing the way you travel?

The phenomenon of “flygskam” – quite literally flight shame – is real, but not as strong in all markets. Those who answered that they would make changes to their travel due to the environment (as shown above) received a follow-up question: In what ways are you considering changing the way you travel? Please select all that apply.

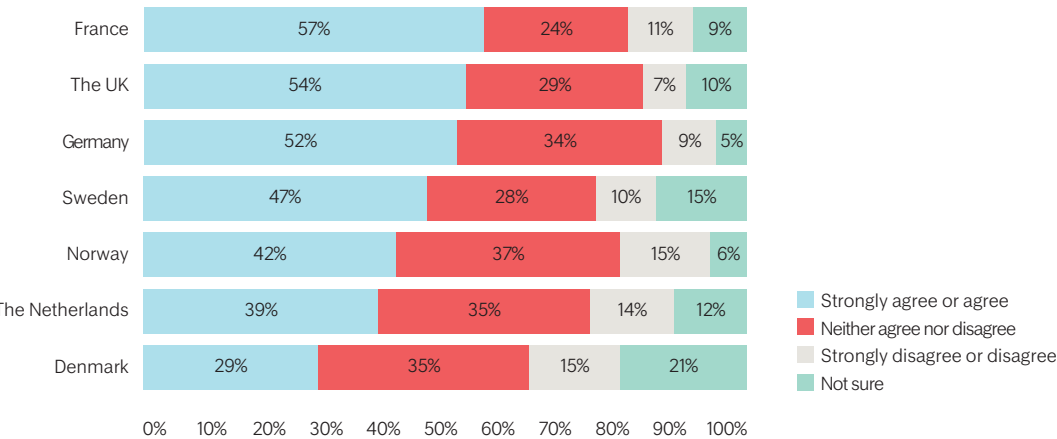


Will travelling to Norway be a good choice?

Over half the population in France, the UK, and Germany consider a holiday to Norway to be a good choice from a sustainability perspective. It is interesting that Danes,

Swedes, and Norwegians agree to a lesser extent. Only 42 per cent of Norwegians consider a holiday in their own country to be a sustainable option.

Travelling to Norway will be a sustainable choice for me



Young environmentalists want to travel to Norway

Among those aged 18–35, the likelihood of visiting Norway increases significantly if they also say that they want to change the way they travel due to concerns about the environment/climate.



05 Norwegians' view of tourism



Norwegians' attitudes towards tourism

Norwegians are proud that foreign tourists choose to come here, and there is consensus that tourism provides increased prosperity, economic growth, and employment. At the same time, resource administration in tourism faces several challenges. The travel and tourism industry in Norway is largely seasonal, with more than half of all overnight stays taking place during the summer months from May to August. It is during this period that the growth has been greatest in some parts of the country.

To take the issue of overtourism seriously, Innovation Norway conducted nationwide surveys that measured Norwegians' views on tourism in 2018 and 2019. We also asked the same of tourists here: Have you been bothered by overtourism during your stay?

The Norwegian Citizen Survey

There are enough respondents here to say something about Norway overall and about each region and Oslo separately. In addition, the results are presented by geographical areas that have a lot of tourism during the summer season as well as areas with ski tourism and northern lights tourism in the winter season.

High-pressure areas in the summer.

Stavanger, Bergen, Ålesund, Stranda (Geiranger), Lofoten, Aurland, Stryn, and Longyearbyen.

Skiing destinations:

Hemsedal, Geilo, Hafjell, Kvitfjell, Trysil, Norefjell, Lillehammer, Voss, and Myrkdalen.

Northern lights tourism:

Tromsø and Svalbard.

NB: There can be many tourists in other places, too. The fact that there are more visitors than permanent residents is often a challenge. This is a citizen survey, so we rely on there being enough people living in these places to be able to interview them.

The scope of tourism

We can divide Norway's population into three categories when it comes to attitudes towards tourism

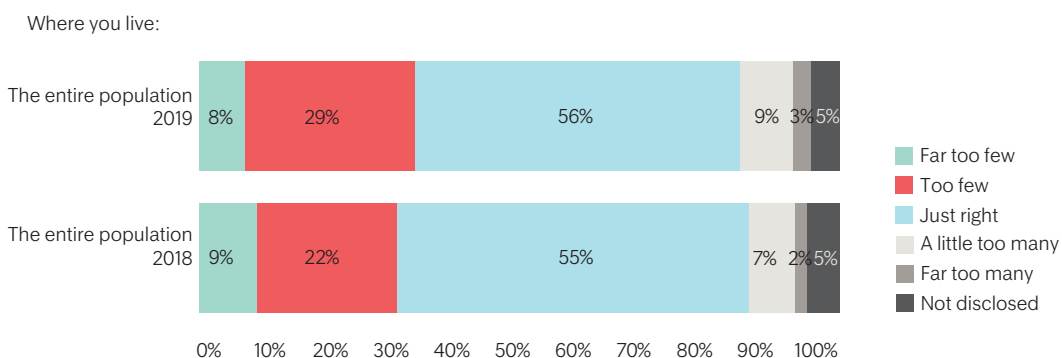
A little over half of the population feel that the current volume of tourists (in 2019) is just right. Then come those who think there are too few tourists. This applies to 37 per cent of the population. Finally comes the group who thinks there are too many tourists. They make up 12 per cent. The challenge is that the share of tourists in some areas has increased from 2018, and it is among residents who live in places where there has been strong

growth in recent years that there is the greatest feeling of overtourism. Cruise tourists, campervans, and other visitors.

Because the number of tourists is not equal throughout the country, or throughout the year, the Norwegian Citizen Survey has enough respondents to say something about Norway overall and per region and for Oslo separately. In addition, the results are presented by geographical areas that have a lot of tourism in the summer season, as well as areas with a lot of ski tourism and northern lights tourism in the winter season.

The volume is just right for half the population

but there was a change last year in Norwegians' attitudes towards tourism



Source:

The Norwegian Citizen Survey, Innovation Norway

Greatest strain in the summer season

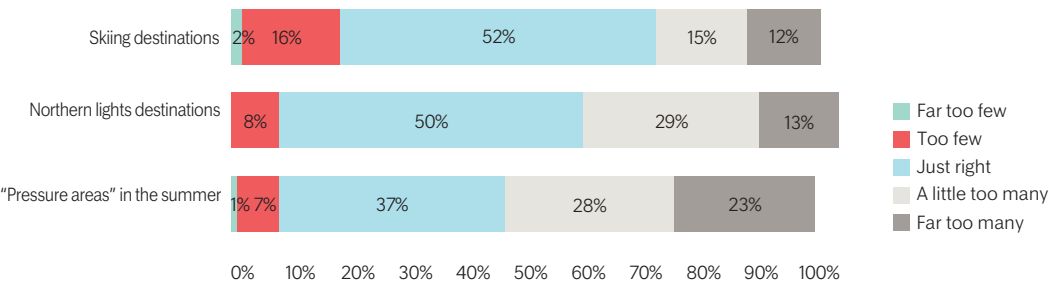
In the summer season, residents of the area of Fjord Norway, Lofoten, and Svalbard in particular notice the pressure from tourism. Here, half answered that there are slightly too many to far too many tourists. During the winter season, we have gathered responses from people who live by larger skiing destinations and those who live in areas with northern lights tourism. The results show that inhabitants of skiing destinations are the least bothered by tourism. Here, a smaller proportion answered that there are too many tourists. Among those who have northern lights tourism, the proportion is slightly higher, and 42 per cent answered here that there are too few tourists.

In the regions in between, it is quite similar, with some exceptions. In the fjord counties and in Northern Norway,

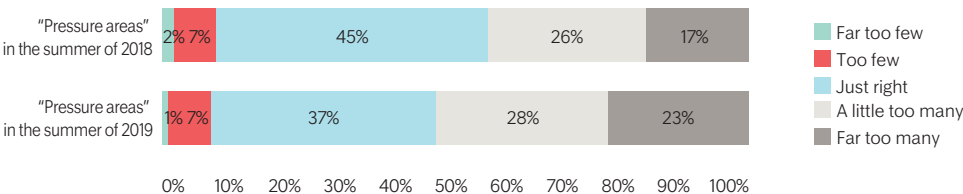
more people (2 in 10) say that the tourist volume is too high compared to the country as a whole (1 in 10). Among those who think that the number of tourists is too high, this means that for most there are "a little too many from time to time".

In particular, the volume of cruises is considered to be too high for an increasing amount of the population (3 out of 10 in 2018 to 4 out of 10 in 2019). On the other hand, in 2019 more people considered the volume of individual tourists to be too low. Many of the results are the same across the country, but it is especially those who have many tourists in Fjord Norway and in Northern Norway who are increasingly experiencing that the number of cruise tourists, and partly tourists with campervans, is too high.

Greatest strain in the summer season



There are areas with a lot of tourism in the summer that reported a greater strain during the 2019 summer season than they did in 2018



All in all, Norwegians are positive about tourism

Tourism creates pride

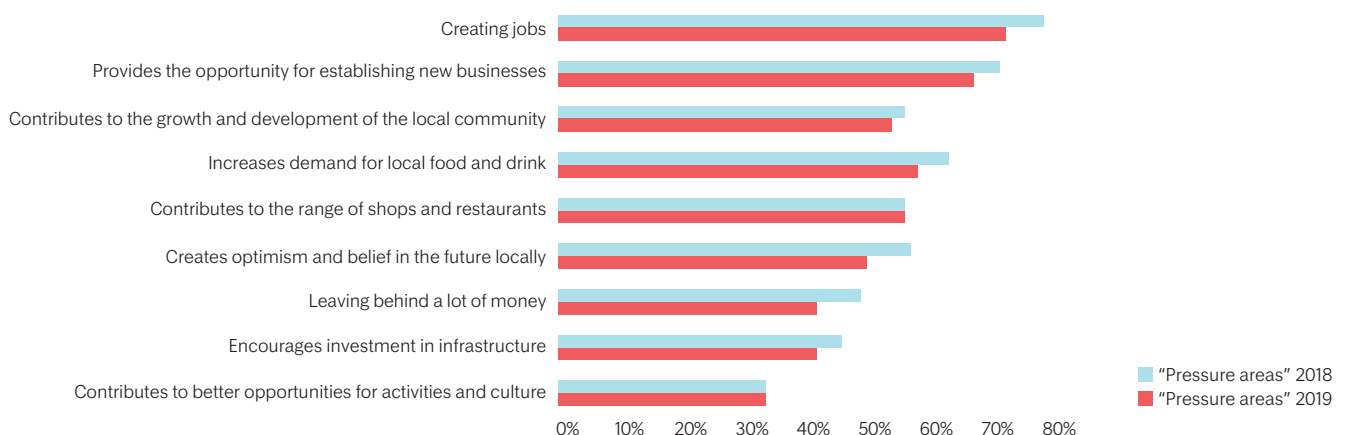
Norwegians are proud that foreign tourists choose Norway as a travel destination. We agree that tourists who visit us get world-class products and experiences, and we want those who visit us to have a good time.

Just over half of Norwegians believe that tourism contributes to local growth and creates optimism and belief in the future. The inhabitants in these pressure areas share the same positive view as the rest of the population, while those near ski resorts stand out by

placing less emphasis on business growth and more emphasis on other positive characteristics. Norwegians think that tourism brings more positive than negative aspects. People in areas with a lot of tourism are more likely than the rest of the population to be aware of the positive impacts of tourism. At the same time, they are aware of the flip side.

Fewer (4–5 out of 10) believe tourism has a positive effect on local infrastructure and cultural offerings or that tourists spend a lot of money in the area.

People living in the "pressure areas" are more aware of the positive side of tourism than the rest of the population, but the enthusiasm has dropped this year



Source:

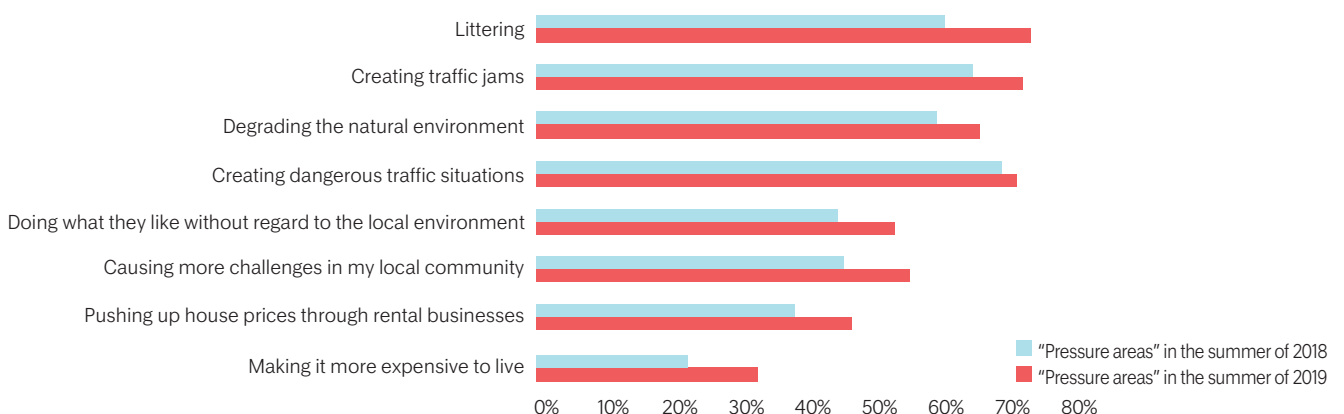
The Norwegian Citizen Survey, Innovation Norway

Litter and creating dangerous traffic situations

Negative effects of tourism are often associated with littering and traffic conditions, while they are to a small extent associated with an increased local cost of living and house prices. In the high-pressure areas, the negative feedback is more varied, while at the same time more people experience these negatives than the population elsewhere in the country.

Littering is mentioned most often, while those in the high-pressure areas experience more negative side effects. In particular they mention the traffic situation and the effect on nature.

In addition to the positive aspects of tourism, views on the negative consequences have increased in areas with a lot of tourism.



Source:

The Norwegian Citizen Survey, Innovation Norway

How did Norwegians in 2019 want tourism to develop?

What if you were allowed to decide the future of tourism? The survey shows that there are more people who want further growth in tourism where they live rather than a reduction. This is especially true in the regions of Eastern Norway (except Oslo) and Southern Norway, but the answers are not so different for the other parts of the country. In the fjord counties and in the northernmost regions, polarisation is hinted at, with 2 out of 10 wanting

a reduction, compared to 1 in 10 in the rest of the country. The growth ambition is often linked to "somewhat more, all year round". The polarisation is due to the fact that of the inhabitants in these areas with many tourists in the summer, the proportion who want a reduction was higher in 2019 (4 in 10) than in 2018 (3 in 10), and in particular in the summer season.

Do visitors experience overtourism?

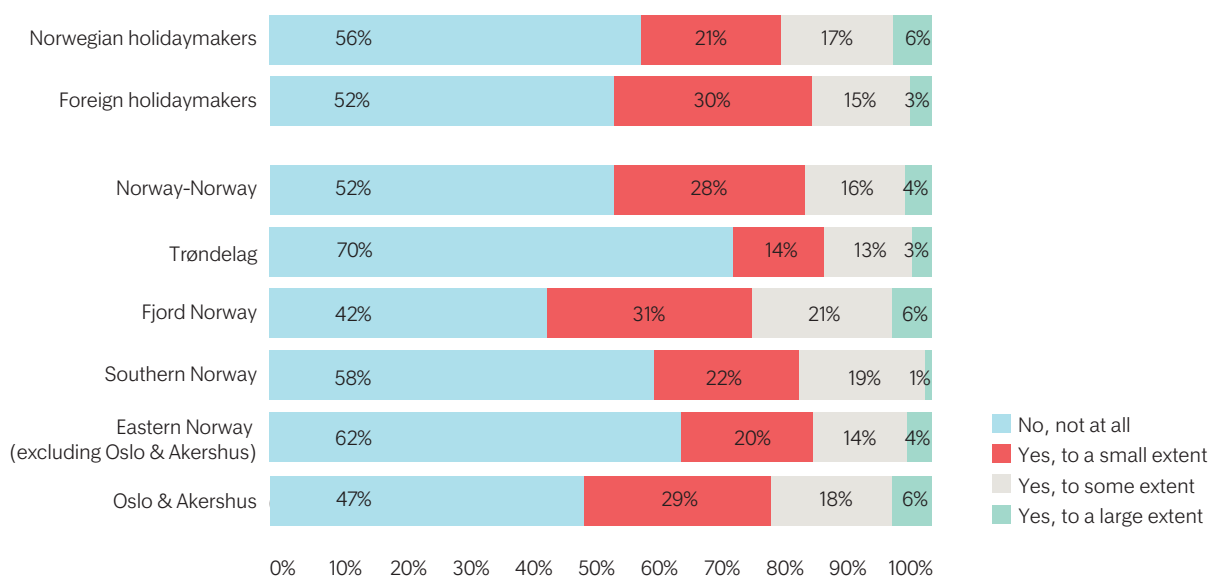
Norwegians report to a greater extent that they experience overtourism compared to foreign holidaymakers

23 per cent of Norwegian holidaymakers and 18 per cent of foreign tourists say that they felt the places they visited were overcrowded to a large degree due to too many tourists there.

This was particularly true of Fjord Norway and Oslo, where over half of the tourists reported that they experienced overtourism to a high degree in the places they visited. Trøndelag is the region of Norway where tourists least experienced overtourism.

Overtourism experienced among holidaymakers distributed by region

The question is formulated as follows: To what extent do you agree with this statement: "The places I visited felt crowded because there were too many tourists there"?



06 Norwegians' holiday habits



Norwegians are at the top of European holidaymakers

Norwegians travel the most in Europe

According to figures from Eurostat, Norwegians are at the top of the list of Europeans who go on holiday. We are only beaten by Finland, which took first place. More than 9 out of 10 Norwegians over the age of 15 went on at least one holiday in 2019. This is far above the European average of 62 per cent.

We enjoy ourselves in cabins

Despite the fact that 2 out of 3 holiday trips are in Norway, two thirds of holiday spending is on overseas holidays. This is due to the fact that when Norwegians travel domestically, more than 6 out of 10 overnight stays are in private accommodation. This is either in a cabin, a summerhouse, or with friends and family. As little as 12 per cent of overnight stays are in hotels, while on holidays abroad over half choose to stay in hotels.

Spain and Sweden at the top

When we're not on holiday in our own country, we take trips to Spain and Sweden. Denmark takes third place in

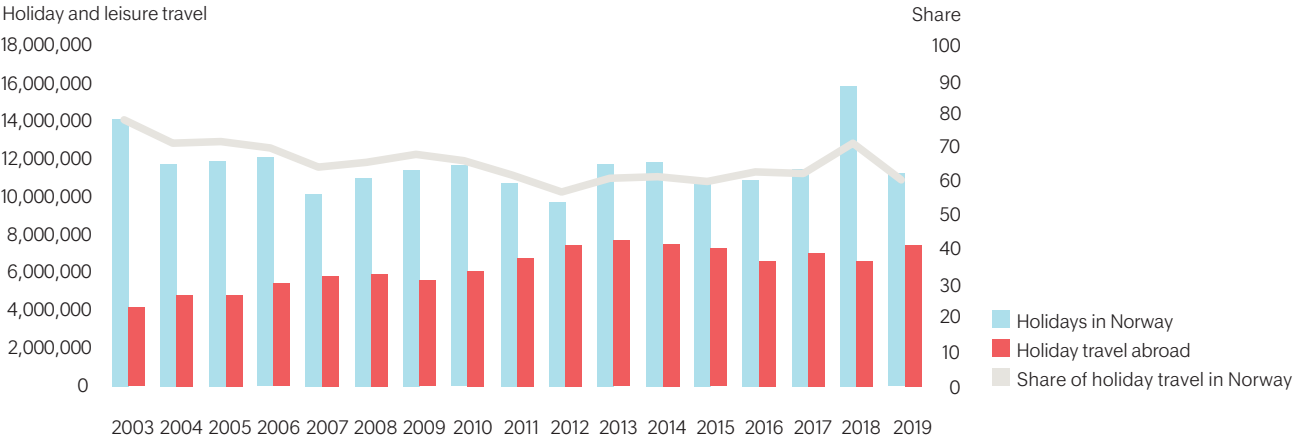
60 per cent of all holiday travel by Norwegians in 2019 was in their own country, while only 26 per cent of the holiday budget was spent here.

where Norwegians go on holiday. In 2019, Norwegians went on a total of 18.5 million holidays domestically and abroad. This is a decrease of 17 per cent, meaning 3.7 million fewer journeys, compared to 2018. The decrease is due to 4.6 million fewer trips in Norway. The number of trips abroad increased by 860,000.

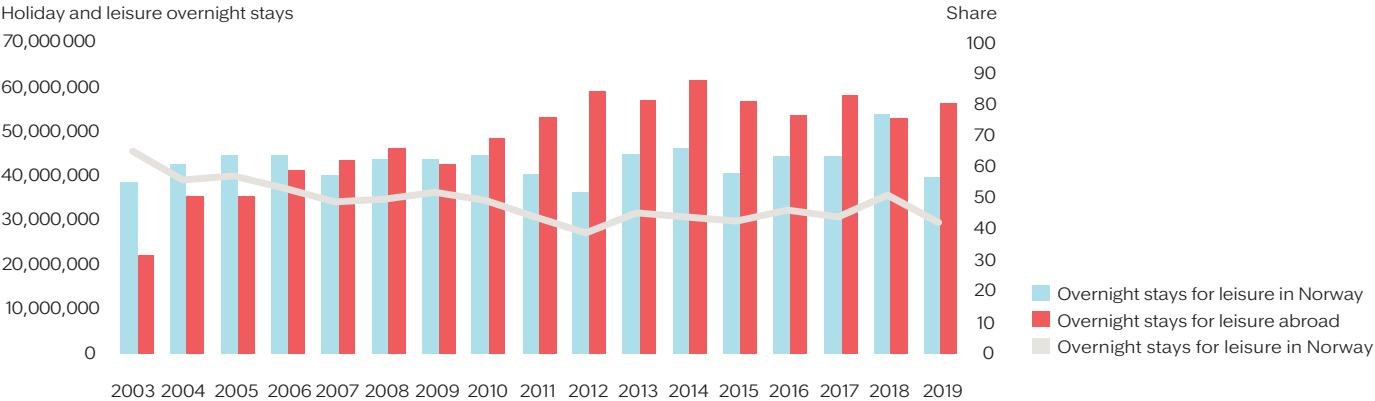
Norwegians have always holidayed the most in their own country, and this isn't a particularly Norwegian phenomenon

As a whole, European residents follow the same travel pattern when it comes to the distribution between domestic and international travel. Approximately two thirds of trips made by European citizens are in their own homeland, as shown by figures from the European Statistical Office (Eurostat).

more time abroad and fewer nights in Norway,



Holiday and leisure overnight stays

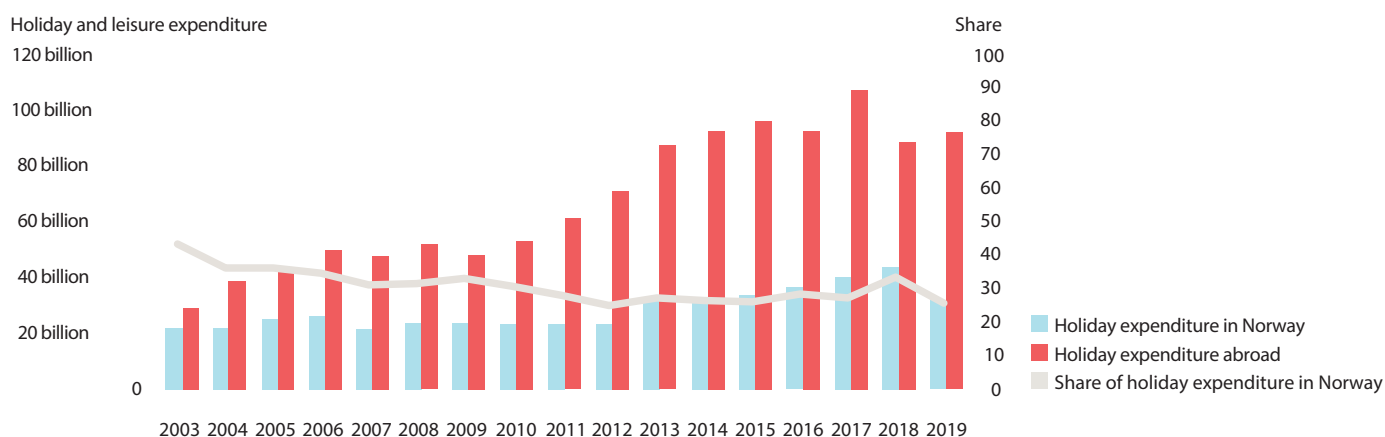


We spend more money on holidays overseas

Norwegians spent slightly less than NOK 123 billion on holiday travel in 2019. This is a decrease of 7 per cent, meaning NOK 8.6 billion less than the year before. The

decrease is due to Norwegians spending NOK 12 billion less on holidays within Norway. The expenditure on foreign holidays increased by NOK 3.4 billion.

Holiday and leisure expenditure



07 Cruises



Cruise tourists make up a small percentage of all holiday traffic

Cruise tourists are a small percentage of all holiday traffic in Norway, but Norway's share of international cruise tourism is greater than our share of land-based tourism.

Today, Norway's share of international cruise tourism is around 3 per cent, and this is steadily rising. The market share of cruises is considerably higher than other forms of tourism, where Norway's share of world tourism is 0.4 per cent (see page 17).

In 2019, there were 944,994 cruise passengers, which is an increase of 11 per cent from 2018. Cruise ships often visit several ports, and if one counts the same guests at all ports the ship visited the total would be 3.3 million day visitors to Norwegian ports.

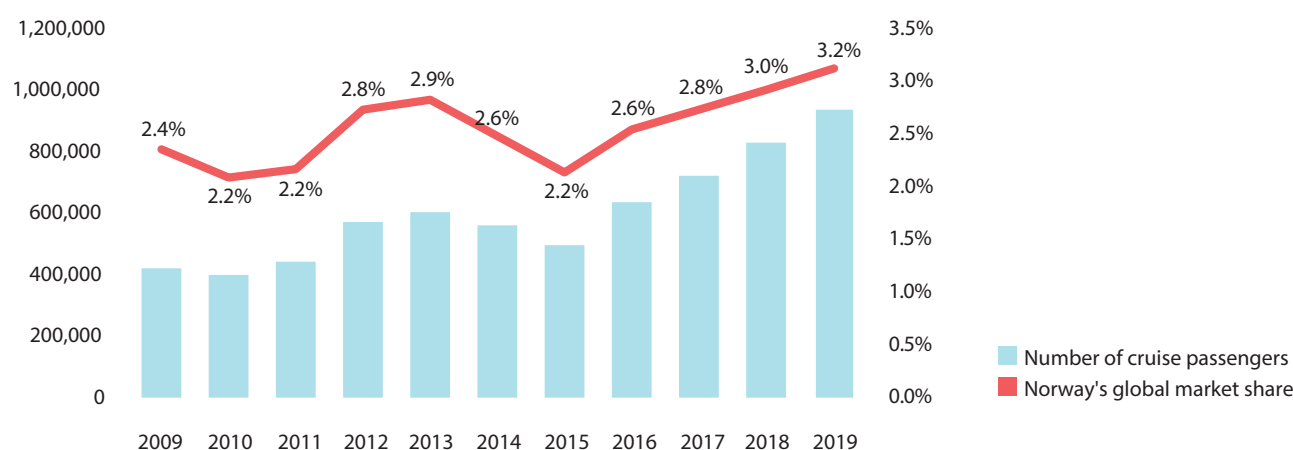
Mostly Germans

Germany is Norway's largest market when it comes to tourism. Most overnight stays from Germans are on land, and the largest share of cruise passengers are also German. In 2019, 37 per cent of all cruise passengers were German, followed by Brits and Americans. In total, these nationalities represent 72 per cent of all cruise passengers.

In 2018, the corresponding share was 68 per cent.

The cruise passengers visited an average of 3.5 Norwegian ports in 2019, which is a decrease from 2018.

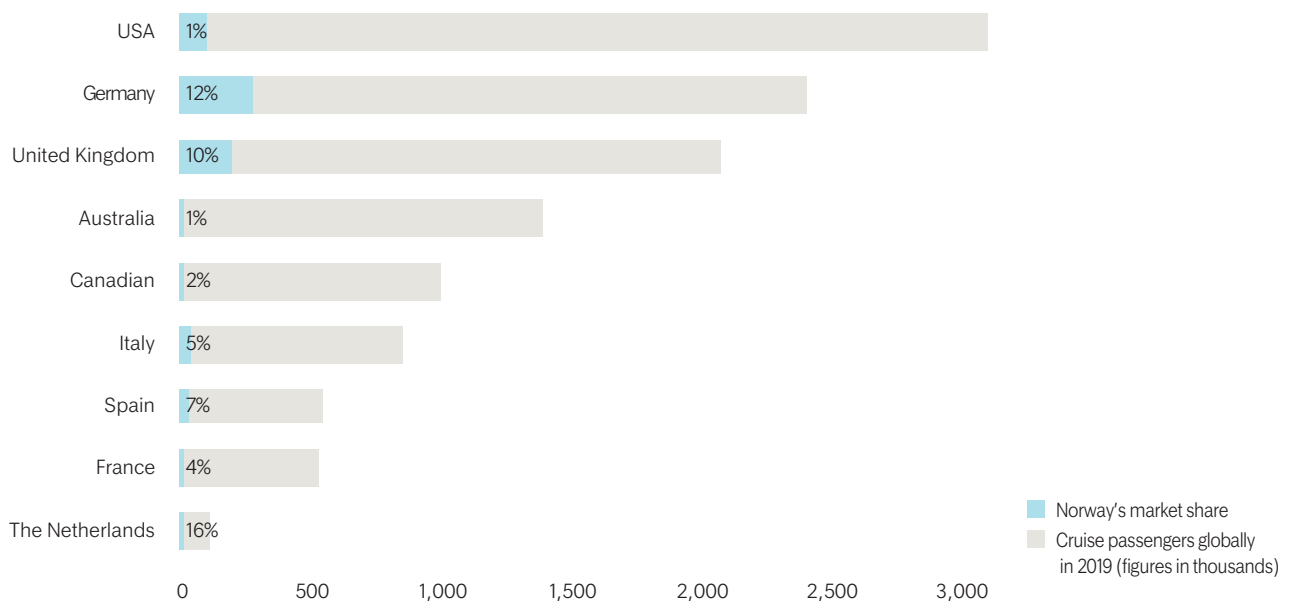
The development of cruise tourism in Norway



Source:

2019 Cruise Trends and State of the Cruise Industry Outlook, Cruise Lines International Association (CLTA), and the Norwegian Coastal Administration

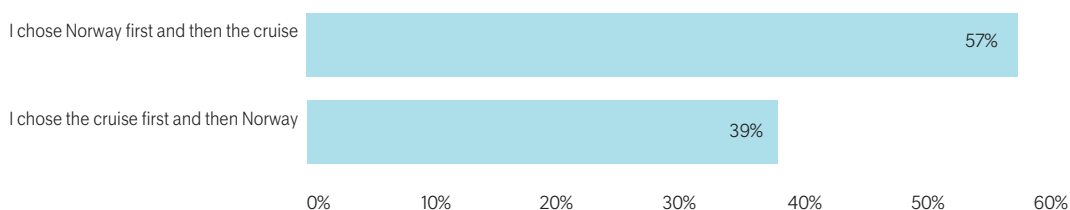
Norway's market share among the various nationalities



Some argue that cruise passengers are not keen to experience Norway as a travel destination because they are first and foremost on a cruise. In the Cruise Survey conducted by Innovation Norway in the summer of 2019, passengers were asked that exact question. 57 per cent answered that it was important for them to experience Norway, while 39

per cent said being on a cruise was the most important. The answers are due to the fact that there is a large variation in the schedule of cruises that visit Norway. Some cruises are only in a Norwegian port as a part of a tour to several countries, while other cruises have a longer trip around Norway, where the ship visits many ports along the Norwegian coastline.

The majority come to experience Norway



Source:

CLTA, the Norwegian Coastal Administration, and the Cruise Survey 2019, Innovation Norway

Nationalities with the most visitors on cruises to Norway

The table shows nationalities with more than 10,000 different cruise passengers in 2019. Each passenger visited 3.5 ports on average, so there was a total of 3,339,917 day visits to Norwegian ports.

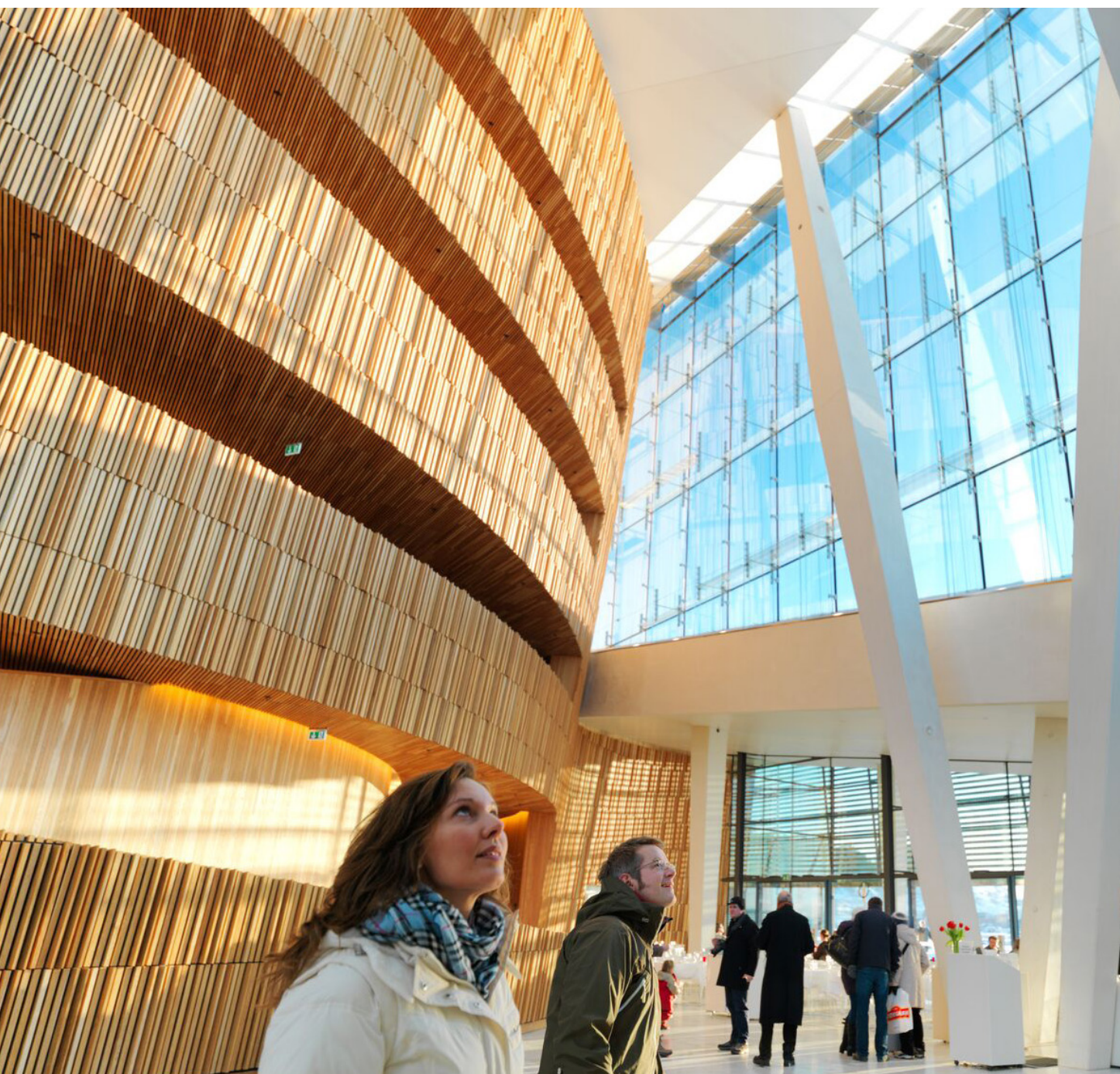
Nationality	2019	Change 2018-2019
Germany	351,980	28%
British	209,060	5%
USA	117,388	12%
Italy	37,833	-5%
Spain	37,610	-4%
Canadian	20,703	12%
The Netherlands	20,696	15%
France	18,322	-9%
Australia	17,224	-10%
Belgium	11,464	-5%
Austrian	10,836	3%
Other nationalities	91,878	-3%
Total	944,994	11%

Most visited ports in 2019

Measured in the number of passengers, Bergen is once again the port with the most passengers, followed by Stavanger and Geiranger.

Port	Number of passengers in 2019	Change 2018-2019
Bergen	576,000	-4%
Stavanger	460,000	38%
Geiranger, The Geiranger Fjord	402,335	13%
Ålesund	355,551	16%
Flåm	257,988	0%
Oslo	233,383	24%
Olden, Nordfjord	176,225	1%
Romsdal Ports (all three)	168,086	-11%
Tromsø	155,160	9%
Trondheim	146,269	-2%
Honningsvåg, Nordkapp	143,717	1%
The Hardanger Fjord, Eidfjord	138,457	4%
Other ports	116,746	-75%
Total	3,329,917	-3%

08 International meetings



496 conferences were held

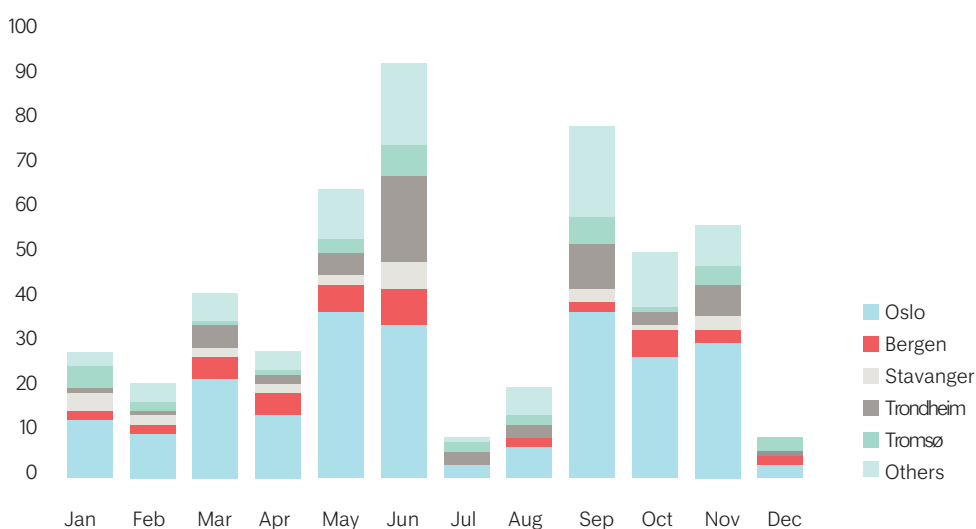
In 2019, 496 conferences were held in Norway. The vast majority were held in Oslo, Bergen, Stavanger, Trondheim, and Tromsø, which are the five congress cities of Norway. This is natural because the larger cities have the hotel capacity to host larger conferences, have direct flights, and have access to convention centres that smaller destinations do not.

At the same time, the conferences are often for academic communities, and the concentration of these is the greatest in cities with large universities and other educational and research environments.

Conferences offer year-round tourism

Travel and tourism in Norway is largely seasonal, with over half of all overnight stays in the summer months of May to August. In 2019, 311 out of the 496 conferences were held outside of the summer months. This means 63 per cent of all conferences that year, which helped to fill hotel beds outside of the main season. Conferences are important for tourism because they have high profitability, thus providing ripple effects for host cities far beyond the travel and tourism season. At the same time, conferences provide significantly greater value to academic communities, regions, and the nation as a whole than the direct value creation in the implementation of each conference.

Congresses during 2019



Source:

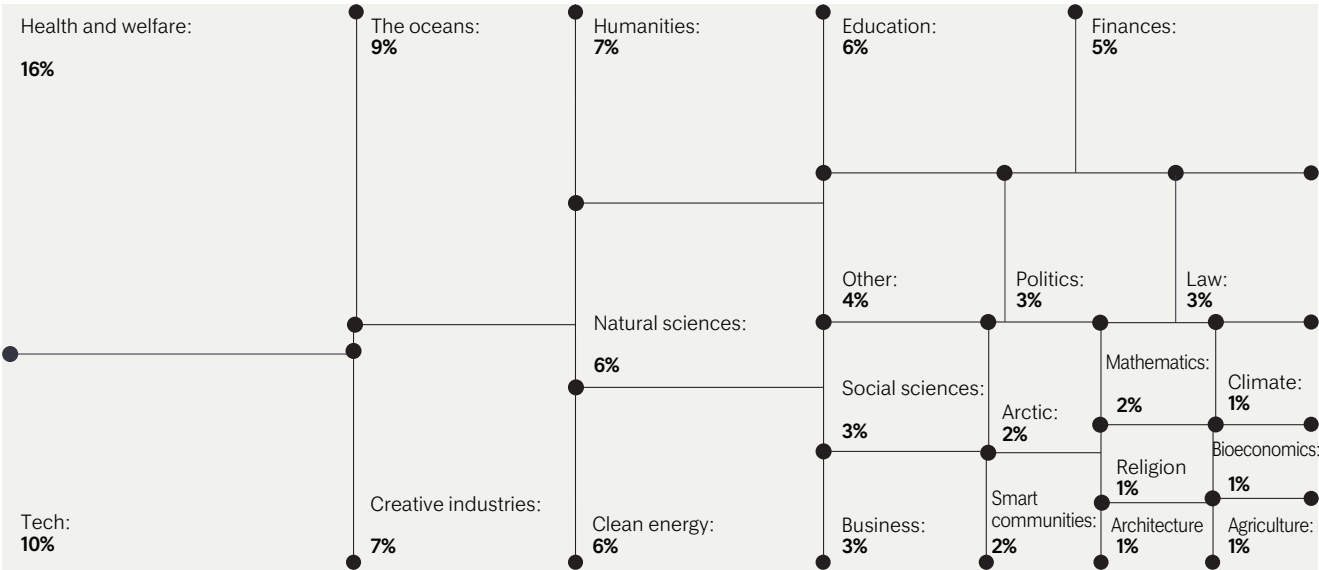
Conference Statistics collected by Innovation Norway

Themes for conferences in Norway

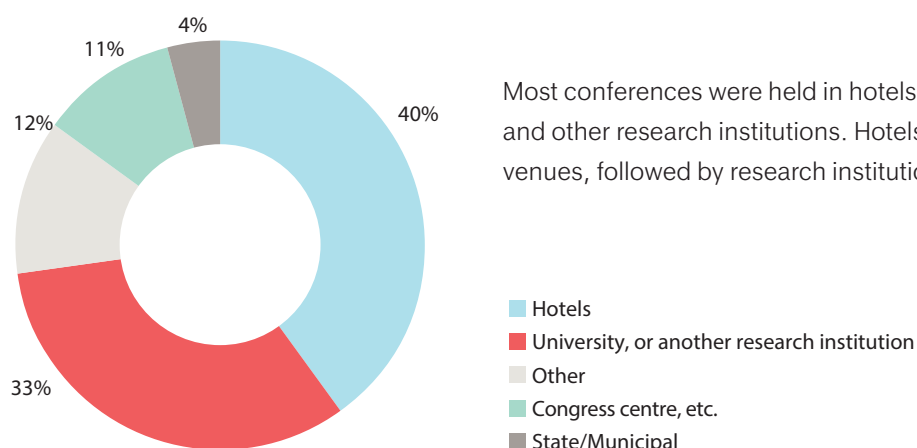
There is a great variety in terms of where conferences are held in Norway and what the themes are. In 2019, the theme of health and welfare was the most common conference theme. This was followed by technology and oceanography. These themes reflect major research areas connected to the universities and other research and educational institutions where there is a large focus

on the development of new technology and the transfer of expertise.

Internationally leading conferences contribute to the visibility and stimulation of Norwegian academic communities, to innovation and development, and to the image of Norway as leading and competent.



Overview of where conferences were held



Most conferences were held in hotels in 2019. After this come universities and other research institutions. Hotels were most often used as conference venues, followed by research institutions such as hospitals and universities.

International Congress and Convention Association – Global*

Rotation Typically, a conference alternates annually or every other year in different countries. The initiative to host often comes from a local academic community or national association.

The duration of conferences in Norway is approximately 2–5 days

The number of conference attendees in Norway ranges from 50 to 7000.

The average is around 270 delegates per conference.

Lead time There are often long decision-making processes, and conferences often have a lead time of 3–5 years or more.

The decision-making process The International Congress and Convention Association (ICCA) estimates that two thirds of the larger conferences require an official application procedure from local members (academic community) but that the percentage of more centralised processes is increasing.**

Key Figures 2019

496

Conferences

2.8

Average length of conference in days

273

Average number of attendees per conference

3,940

Daily expenditure in NOK

Source:

Conference Statistics collected by Innovation Norway.

The Tourism Study, Innovation Norway*Source: University of Agder and ICCA, **Source: ICCA Association Meetings Bidding and Decision Making Manual

Innovation Norway in brief

Innovation Norway's objective is to be the Norwegian government's and the county authorities' main instrument for achieving value-creating business development throughout the country.

With a regional presence in both Norway and abroad, Innovation Norway is uniquely positioned to stimulate profitable business development based on the regions' differing conditions and business opportunities.

Innovation Norway has many clients, and they all require us to contribute to long-term, sustainable value creation in Norway and to work with companies both individually and within networks.

Innovation Norway has a broad and complex social responsibility. The core of this work is to contribute to value creation by creating profitable enterprises and socio-economically profitable business development across the country.

Innovation Norway's programmes and services are intended to create successful entrepreneurs, more companies with growth potential, and more innovative business clusters.

Our customer groups range from entrepreneurs, business ventures in the early start-up phase, and small businesses, to large groups of companies with growth potential in all sectors and industries. Common to all the groups is that they see opportunities in making use of the expertise and assistance that Innovation Norway provides on behalf of a society that attaches importance to new, forward-looking business development.

With its nationwide network of offices, Innovation Norway is able to meet its customers in their business environment. Internationally, customers are served through our offices in the most important markets worldwide.

Innovation Norway is owned by the Ministry of Trade, Industry and Fisheries (51 per cent) and the County Councils (49 per cent combined).

Definitions

Arrival A holiday or business trip with at least one overnight stay.

Brand Tracker Innovation Norway conducts weekly surveys in Denmark, Norway, Sweden, the UK, Germany, the Netherlands, and France. The survey includes questions about the likelihood of the respondent travelling to Norway and their perceptions of Norway as a tourist destination. The survey also indicates whether the marketing work being conducted is providing the desired results.

Commercial overnight stays Overnight stays at hotels, campsites, cabin villages, and youth hostels.

Competitive Price Index A nominally effective exchange rate calculated on the basis of the exchange rate of the Norwegian Krone against Norway's 28 most important trade partners.

Foreigner A person who lives outside of Norway.

Holiday A trip where the main purpose is stated to be:

- visiting friends or family
- holiday and leisure trips, including ski trips
- shopping

Long trips Four or more overnight stays.

Overnight stays Number of overnight stays per trip.

Regions Fjord Norway: Møre and Romsdal, Sogn and Fjordane, Hordaland and Rogaland.
Northern Norway: Finnmark, Troms, and Nordland.
Southern Norway: Telemark, Vest-Agder, and Aust-Agder.
Eastern Norway: Oslo, Akershus, Buskerud, Oppland, Hedmark, Vestfold, and Østfold.

Short trips One to three overnight stays.

Summer season The period covering May to August.

The Tourism Survey Innovation Norway conducts a year-round nationwide survey where Norwegian and foreign leisure and holiday tourists, together with business travellers, are interviewed at tourist attractions, ski resorts, ports, airports, etc.

The Travel Survey

A sample survey conducted by Statistics Norway, the purpose of which is to map Norwegians' travel habits domestically and abroad.

Tourism satellite accounts The purpose of tourism satellite accounts is to describe the economic effect of tourism in a way that is comparable and consistent with other parts of the economy as described in the national accounts. The Tourism Satellite Account forms an integral part of the annual national accounts and is compiled by Statistics Norway.

Tourist arrivals Includes figures for holiday, leisure, and business trips with a minimum of one overnight stay.

Tourist/tourism Activities of people travelling and staying in places outside of their ordinary place of residence, regardless of purpose, for less than a year. Individuals who are employed in the country they are visiting fall outside the scope of this definition.

Travel party This refers to people travelling together with shared finances.

UNWTO World Tourism Organization.

Winter season The period covering January to April.



