



Innovation
Norway

Report



Key figures for Norwegian travel and tourism 2018

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Photos pages 2–3
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New record year for the tourism industry

IN RECENT YEARS Norway has experienced a strong increase in foreign tourists, which has had a positive effect on the Norwegian economy. Total tourism consumption is estimated at NOK 176.6 billion, and foreigners' contribution of NOK 52.6 billion to the total is record high.

Even with strong growth in foreign visitors, the majority of those who spend their holidays here are Norwegians. Figures from Statistics Norway show that 70 percent of all holiday trips that Norwegians had in 2018 were in their own country. This is more than in 2017, and is largely due to the increase in shorter holidays, such as weekend trips.

In addition to Norwegians, it is the home markets that dominate. 93 percent of all commercial overnight stays come from Norwegians and Europeans. This means that seven percent of total overnight stays come from visitors outside Europe. The impression might be that the proportion is greater, and this is natural, since growth from countries outside Europe has been the greatest in recent years. The world's population travels even more, the world is perceived as getting smaller, and low-cost direct routes result in a change to the composition of those who visit us. In 2005, 11 percent of all foreign overnight stays were from countries outside Europe. Now this share is 23 percent. So not only will there be more visitors to Norway, but growth from overseas markets is greater than that from European markets

Tourism creates pride

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 limited to the summer months from May to August. It is also during this period that there has been the greatest growth in recent years. The growth in the summer season is not evenly distributed throughout the country, but is mainly concentrated in specific limited areas.

High tourist concentration in limited periods of the year, creates new challenges, and residents of these over-populated areas emphasise problems related to traffic and wear and tear on nature, and four out of ten think that tourists do whatever they like. There is also consensus that we could be better at earning money from those who visit us.



Margrethe Helgebostad

Market insight, tourism

Cultural activities drive consumerism and value creation

As opposed to natural activities that are, in many cases, free of charge, thus cultural activities increase consumption. This is precisely why the combination of cultural and natural activities is important. Norway has a strong position in nature-based tourism. It is a foundation we should be proud of and build upon, but we must also add other values.

Experiencing nature is important for most people who spend their holidays here, and the wish to experience cultural activities comes in addition. If we are to ensure future growth, extend the season and gain increased value creation, we need to give people more reasons to choose us. Not instead of nature, but in addition to nature. We need to get better at giving of ourselves, developing a broader range of experiences, greater diversity, more culture and adventures, and demonstrate that a holiday in Norway is a sustainable alternative. 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. Read more about this and more in the brochure.

Innovation Norway conducts a series of surveys

Most of the data in the Key Figure Brochure is obtained from surveys conducted by Innovation Norway. The

Tourism Survey provides a great deal of information about Norwegian and foreign tourists in Norway. An important aim is to document the importance of the tourism industry to the Norwegian economy. While the Tourism Survey is conducted in Norway, the Brand Tracker measures Norway's strengths and weaknesses at home and abroad. Does the target group have the associations to Norway that we would like them to have? The survey provides insight into motives for traveling on holidays and what determines whether to book a holiday in Norway. The latest addition is a survey of Norwegians, aimed at measuring Norwegians' attitudes to tourism, for better or for worse.

Assignment from the Government

The assignment letter from the Norwegian Ministry of Trade, Industry and Fisheries states: "Innovation Norway will collect and compile statistics, further develop market data and other analyses and documents that are relevant to the tourism industry as well as actively disseminate information about markets and international trends in the tourism industry." Only a small excerpt from this is included in this brochure.

More detailed information and full reports can be found on Innovation Norway's tourism website: visitnorway.no/innsikt.

Have fun reading!
Margrethe Helgebostad

Key Figures

	2012	2013	2014	2015	2016	2017	2018	Change last period
Employment in the tourism industry								
Full time equivalents, salaried employees and self-employed persons	153,000	153,700	156,800	159,100	162,400	166,400 ¹	N/A	2%
Tourist consumption in Norway, by consumer group. Current prices. Figures in NOK millions.								
Total consumption	136,882	145,156	151,416	158,669	169,795	176,618 ¹	N/A	4%
Foreign tourist consumption in Norway	36,574	38,214	40,629	45,407	50,201	52,632 ¹	N/A	5%
Norwegian domestic tourist consumption in Norway	78,008	84,158	86,939	90,101	95,339	99,004 ¹	N/A	4%
Norwegian industry's business travel costs in Norway	22,300	22,784	23,848	23,161	24,255	24,982 ¹	N/A	3%
Expenditure. Figures in millions.²								
Total expenditure							128,800	
Norwegian tourists							109,000	
Foreign tourists							19,900	
Holiday overnight stays²								
All holiday overnight stays							103,781,889	
Norwegian holiday overnight stays							92,523,127	
Foreign holiday overnight stays							11,258,762	
Non-commercial holiday overnight stays²								
All non-commercial overnight stays							44,599,197	
Norwegian non-commercial overnight stays							43,490,846	
Foreign non-commercial overnight stays							1,108,351	
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	2%
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	1%
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	2%
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	-3%
Norwegian cabin rental overnight stays	283,046	276,100	292,219	323,118	297,879	257,452	232,230	-10%
Foreign cabin rental overnight stays	705,421	825,495	888,966	751,912	764,408	756,244	747,308	-1%
Cruise tourism								
Number of visiting cruise passengers	588,000	620,000	574,000	511,000	658,882	749,414	852,241	14%
Number of day visitors from cruises to Norwegian ports	2,573,335	2,996,114	2,667,362	2,494,921	2,700,000	3,045,000	3,436,376	13%
Number of cruise ship port calls to Norwegian ports	2,066	2,187	1,985	1,787	1,809	2,067	2,135	3%
Norwegian holiday and leisure travel								
All holiday and leisure travel domestic and foreign	17,000,000	19,190,000	19,140,000	17,880,000	17,320,000	18,350,000	22,220,000	21%
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	38%
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	-6%

¹ Preliminary figures

² The tourism survey was expanded in 2018, therefore figures are not available for previous years

³ Generic term for overnight stays in commercial accommodation such as hotels, campsites, cabin villages and youth/family hostels



The figures include both Norwegian and foreign business and leisure travellers, and there is a predominance of Norwegians. As many as 92.4 million overnight stays, corresponding to a share of 89 percent are Norwegians on business travel or holidays in their own country. 11.3 million overnight stays are by foreigners who are resident outside Norway.

Of the foreign overnight stays 9.7 million are holiday-related, and 1.6 million are in connection with business travel. For Norwegians most overnight stays are in connection with holidays. A total of 78.1 million overnight stays are holiday-related, and 14.3 million are business-related. Foreign tourists spent NOK 19.9 billion (15 %) of a total expenditure of NOK 128.8 billion.

NORWEGIAN AND FOREIGN TOURISTS

103.7
Millions of overnight stays

128.8
NOK billions of total expenditure

NORWEGIAN TOURISTS

92.4
Millions of overnight stays

109.0
NOK billions

FOREIGN TOURISTS

11.3
Millions of overnight stays

19.9
NOK billions

HOLIDAYMAKERS

78.1
Millions of overnight stays

74.2
NOK billions

BUSINESS TRAVELLERS

14.3
Millions of overnight stays

34.7
NOK billions

HOLIDAYMAKERS

9.7
Millions of overnight stays

16.0
NOK billions

BUSINESS TRAVELLERS

1.6
Millions of overnight stays

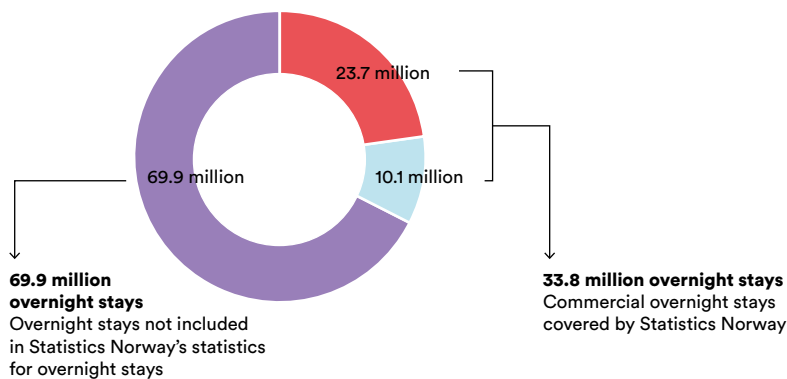
3.8
NOK billions

Number of overnight stays

Total expenditure

In 2018, overnight stays in Norway totalled 103.7 million. 33.8 million of these were overnight stays in commercial accommodation, whereas 69.9 million were overnight stays not included in Statistics Norway's statistics, such as accommodation in privately owned or borrowed cabins, staying with friends and acquaintances, or via online platforms such as Airbnb and the like.

Total number of overnight stays in Norway in 2018



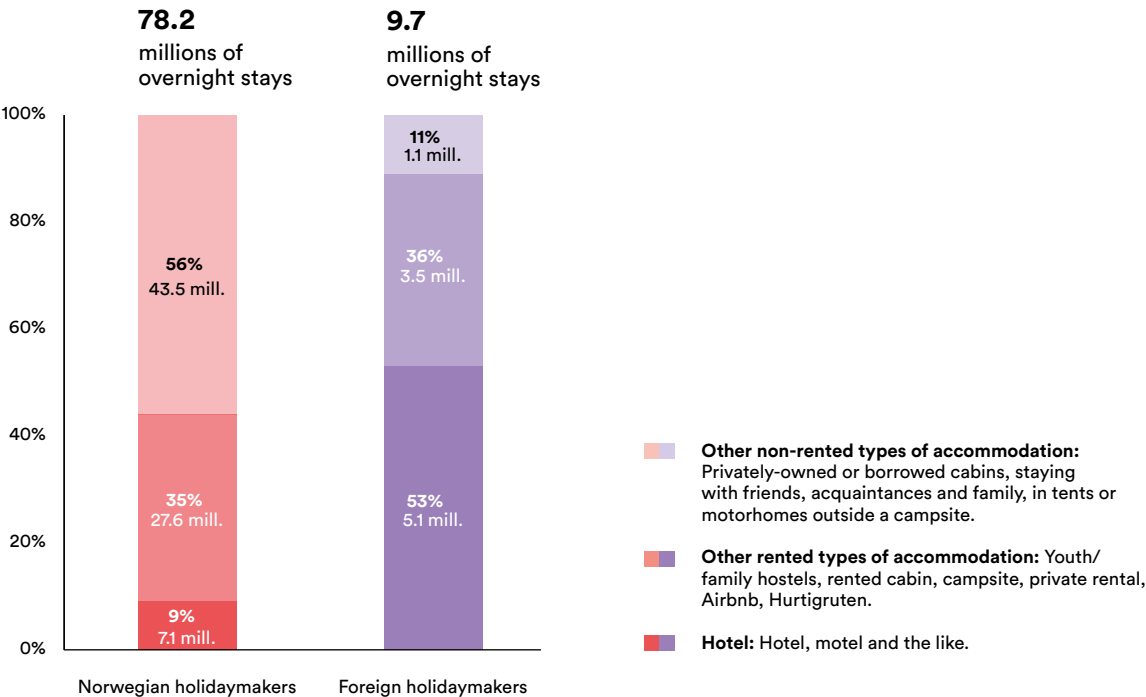
- Hotel overnight stays (as stated in Statistics Norway's accommodation statistics).
- Other overnight stays: Campsites, cabin villages, youth/family hostels (as stated in Statistics Norway's accommodation statistics).
- Other overnight stays (not included in the accommodation statistics): All types of overnight stays that are not reported. This applies to overnight stays in rented/borrowed cabins, Airbnb, staying with friends, family, acquaintances, etc.

Just over half of all foreign overnight stays are in hotels

The tourism survey shows that 53 percent of all foreign holiday accommodation is in hotels, while 36 percent is at campsites, youth/family hostels, Hurtigruten or cabins/rooms/apartments rented from private owners. The last group consists of holidaymakers who stay with friends and acquaintances, borrow a cabin or stay in tents and motorhomes outside a campsite. This is the smallest category, but totals 1.1 million overnight stays.

However, the last category is the most common for Norwegians. 56 percent of all holiday overnight stays are in "Other non-rented accommodation" such as accommodation in privately-owned or borrowed cabins, staying with friends and family, and in tents and motorhomes outside a campsite. Only 7.1 million, representing nine percent of all Norwegian holiday overnight stays, are in a hotel.

Distribution of holidaymakers' overnight stays



The distribution of the Norwegian overnight stays is based on the Norwegian Travel Survey, while the distribution of the foreign overnight stays is based on the Tourism Survey.

Scope of tourism in the regions

Calculation of expenditure per region

The expenditure per region is calculated based on the tourists' average daily expenditure and the number of overnight stays in the respective region. For example, if a tourist has an average expenditure of 1,000 NOK per day and spends half of their holiday in southern Norway, this will correspond to an expenditure in southern Norway of 500 NOK per day (50% x 1,000 NOK). The calculation therefore also assumes that tourists' expenditure is evenly distributed throughout the holiday.

Holiday tourism's volume and total expenditure per region

TRØNDELAG



7.5/3.6

Millions of
overnight stays



8.3/1.7

NOK billions

NORTHERN NORWAY



16.2/2.4

Millions of
overnight stays



14.2/2.6

NOK billions

FJORD NORWAY



15.9/3.8

Millions of
overnight stays



10.5/4.3

NOK billions

EASTERN NORWAY*



22.7/2.2

Millions of
overnight stays



21.2/2.4

NOK billions

SOUTHERN NORWAY



5.5/0.8

Millions of
overnight stays



10.3/0.7

NOK billions

OSLO & AKERSHUS



7.5/3.6

Millions of
overnight stays



9.7/4.3

NOK billions

■ Norwegian holidaymakers ■ Foreign holidaymakers

* Eastern Norway, excluding Oslo & Akershus

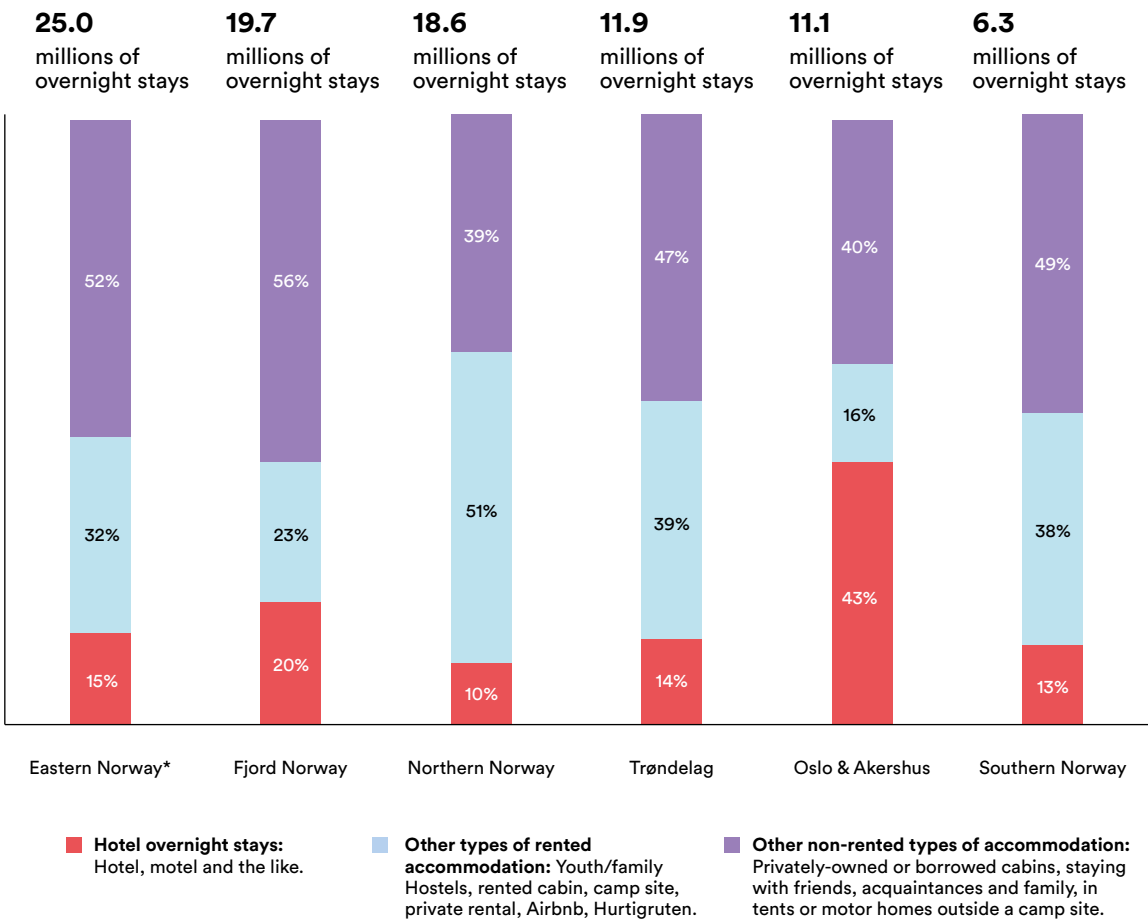
Source The Tourism Survey, Innovation Norway

Holiday overnight stays per region

The large proportion of overnight stays excluding hotels that is common to all regions, is due to the fact that Norwegians mainly use other types of accommodation. The proportion for foreigners is 42 percent, as shown on page 10. However, Oslo & Akershus, has the highest level of hotel overnight

stays in the country, although other types of accommodation also dominate here. In Northern Norway other types of rented accommodation dominate. While in Eastern Norway, Southern Norway and in Trøndelag and Fjord Norway, non-rented accommodation is the most used.

Holiday overnight stays during the year



* Eastern Norway, excluding Oslo & Akershus

Source The Tourism Survey, Innovation Norway

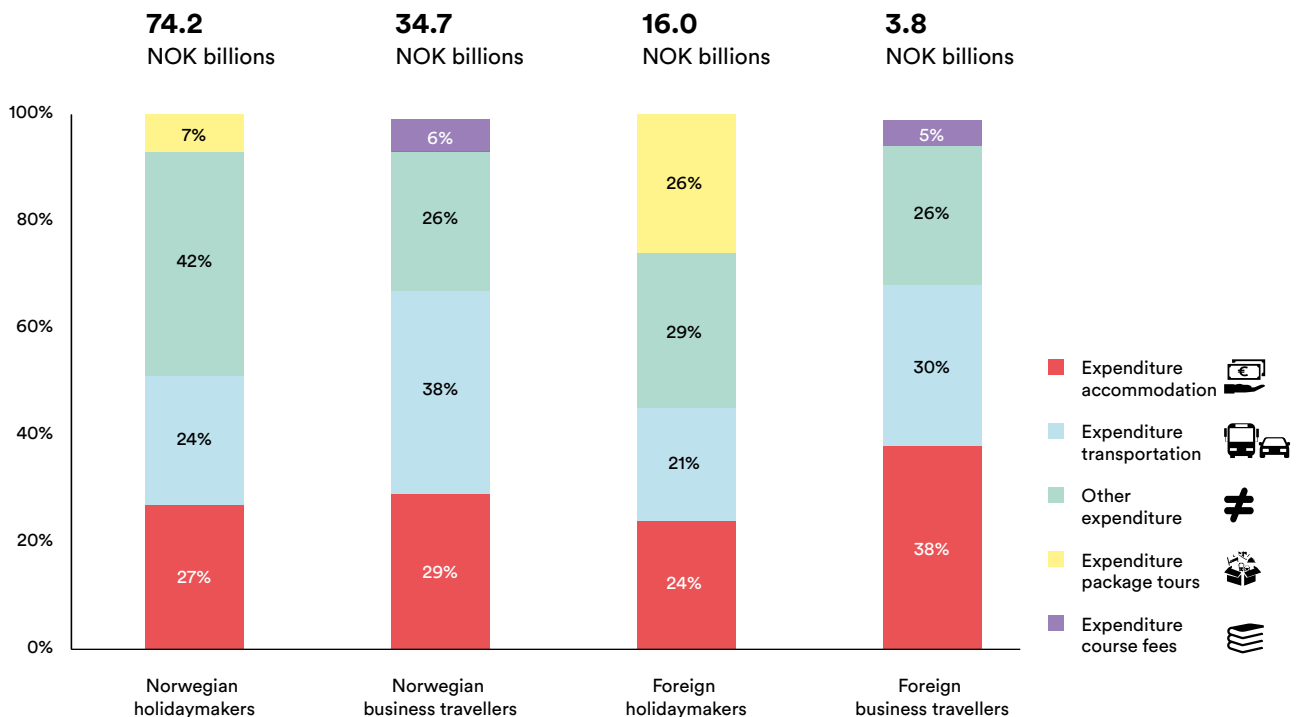
Distribution of expenditure

Not surprisingly, much of the holiday budget is spent on accommodation and transportation, and it is those who are here on holiday, that have the greatest share of "Other expenditure". This is money that is spent on shopping, experiences, food and the like. Business travellers spend the greatest proportion on accommodation. This is related to the fact that the vast majority of business travellers stay in hotels.

The Tourism Survey shows that 28 percent of the foreign visitors had purchased a package tour in 2018. This does not only apply to visitors who come from far away but also to Swedes, Danes and Germans. These figures include transport to Norway, but most of the money goes directly to Norwegian tourism. This includes everything from accommodation, transportation in Norway, food and beverage services, ski passes and other prepaid activities.

Tourists are asked how much money they have spent on transportation to and from Norway, hotels, package tours and, where relevant, course fees for business travellers. The "Other expenditure" category includes spending in Norway excluding accommodation, such as shopping, activities, experiences and the like.

Total expenditure distributed by different expenditure items



In 2018, "Expenditure transportation" covers the total expenditure on transportation to Norway and within Norway.

In 2019, it only covers transportation in Norway. In this analysis, Q2, Q3 and Q4 are from 2018, while Q1 is from 2019.

Source The Tourism Survey, Innovation Norway

The economic contribution of the foreign holiday markets

The figure shows the average daily expenditure and the total number of overnight stays in Norway. The size of the circle indicates the amount of money that each market contributes.

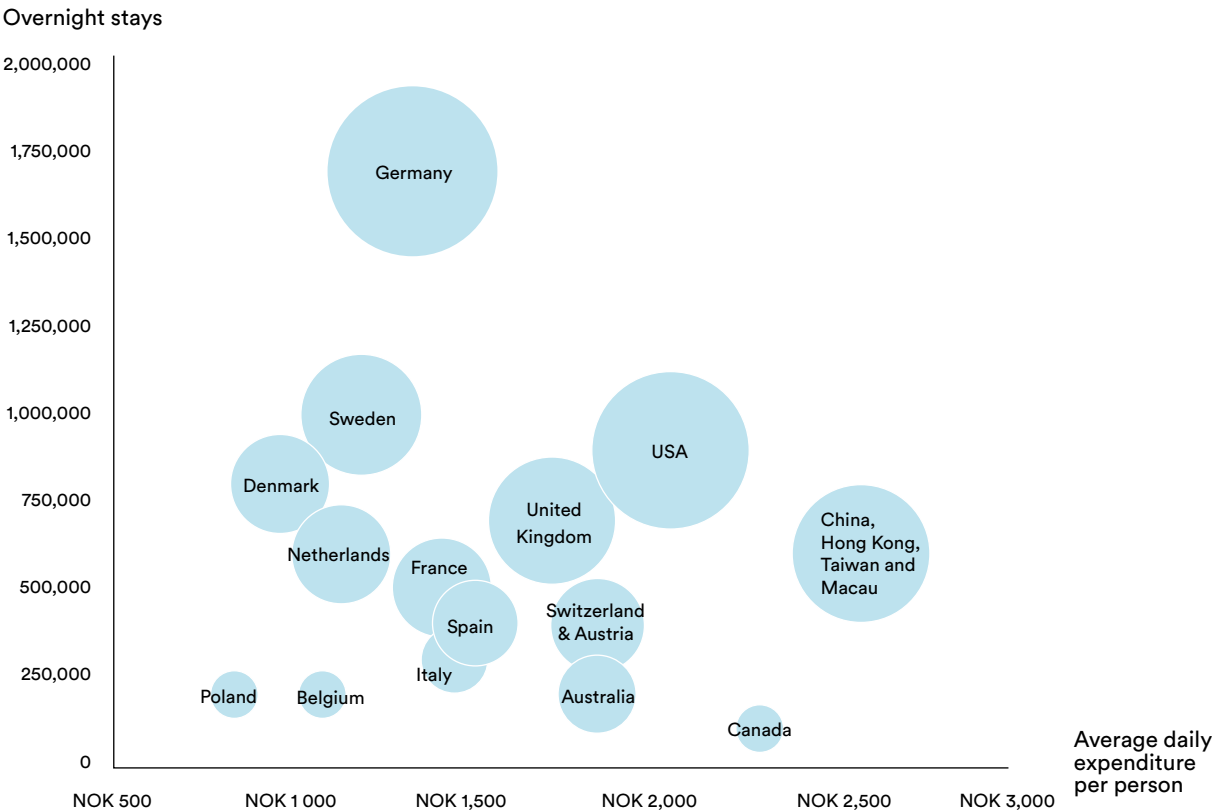
As the figure shows, there are huge differences in both expenditure and overnight stays. German holidaymakers have an average daily expenditure of about NOK 1,335. This is not the group that spends most money per day, but many Germans spend long holidays in Norway, and with a total of 1.7 million overnight stays, their total expenditure is NOK 2.3 billion.

The tourism survey has adopted a new model for calculating expenditure

The recent change in data collection has made it possible to estimate a more precise daily expenditure and total expenditure per market. Therefore, expenditure figures cannot be compared to previous reports.

The markets' total expenditure in Norway

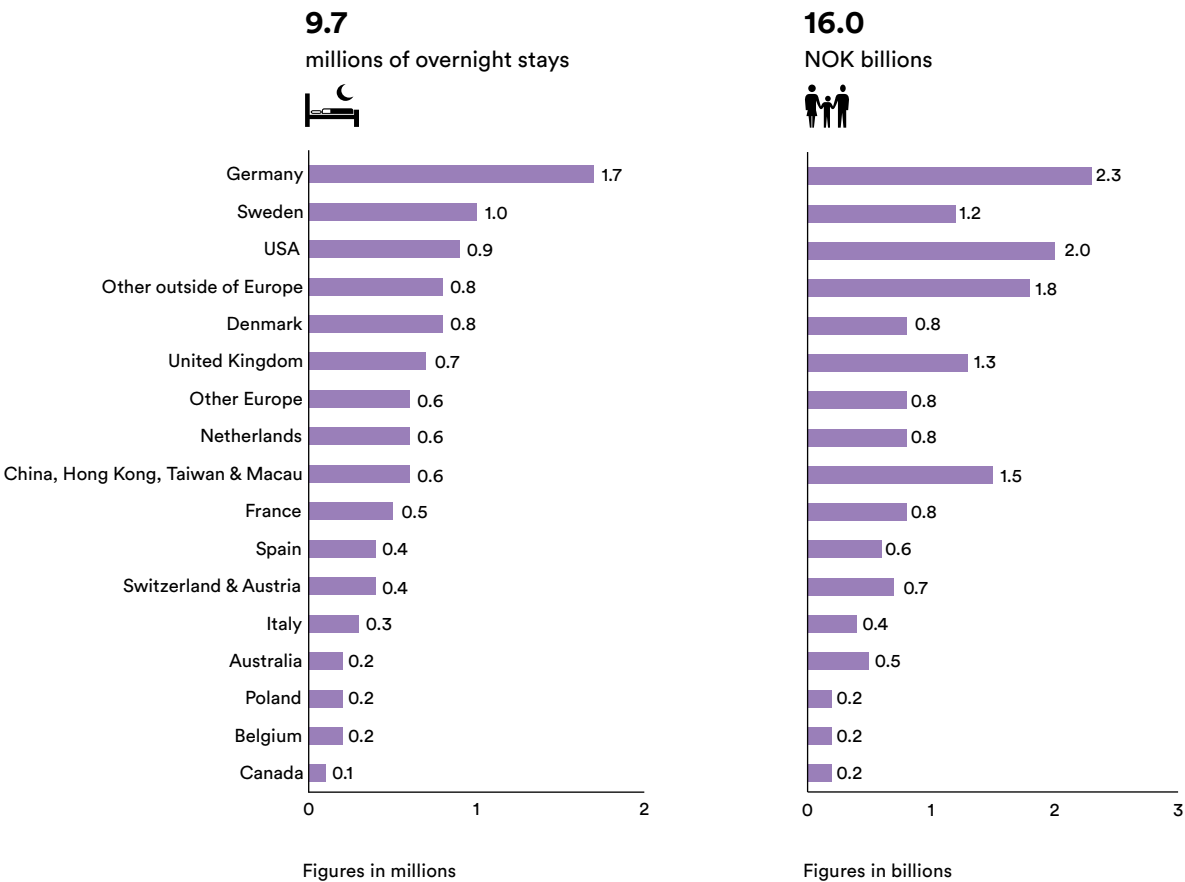
The size of the circles shows the markets' total financial contribution



Total volume and expenditure of the foreign holiday markets

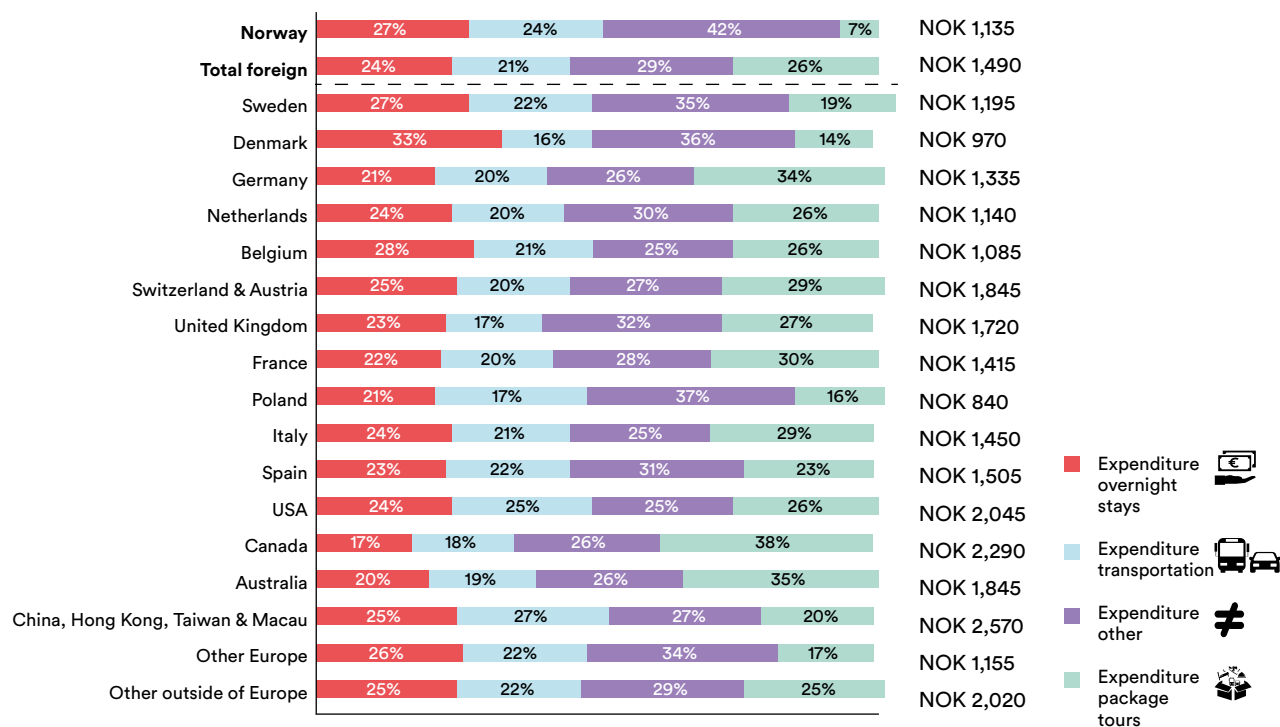
The graphs show the same as the previous page, number of overnight stays and total expenditure per market. Germany is the largest, both in terms of the number of overnight stays and expenditure. There are more Swedish, than American overnight stays, but Americans spend more.

Total volume and expenditure distributed by the foreign holiday markets



Average daily expenditure and what it is spent on

Average daily expenditure distributed by holiday markets



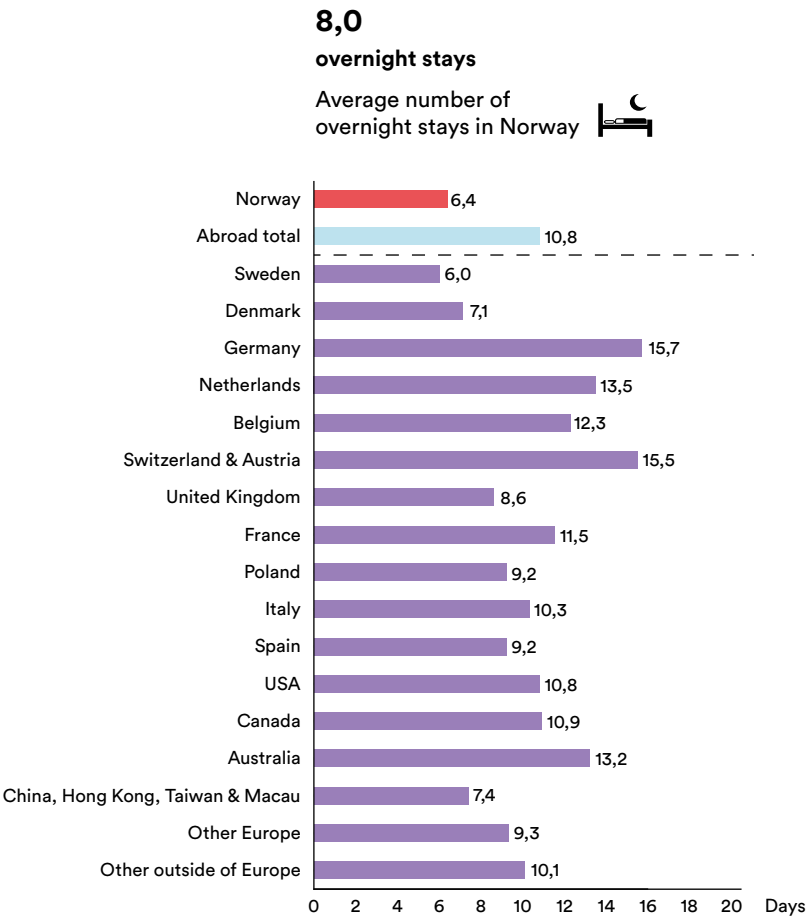
In 2018, "Expenditure transportation" covers the total expenditure on transportation to Norway and within Norway.

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Average number of overnight stays in Norway

The average tourist stays here for eight days.

Average number of overnight stays in Norway



The importance of tourism to Norway

TOURISM accounts for 4.3 percent of GDP.

In recent years, Norway has experienced a strong increase in foreign tourists, which has had a positive effect on the Norwegian economy. Total tourism expenditure is estimated at NOK 176.6 billion according to preliminary figures from Statistics Norway. That is NOK 6.6 billion more than in 2016.

Foreign visitors contribute a record-breaking amount

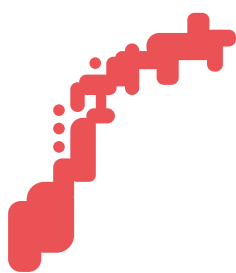
The contribution by foreign tourists amounts to NOK 52.6 billion, representing a share of 30 percent. That is NOK 2.4 billion more than the year before, representing a growth of five percent.

One of ten new jobs is in tourism

The tourism industry employs 166,400 people, which is two percent more than in 2016. Most jobs are in transportation and food and beverage services. The need for new manpower is growing at the same pace as the rest of the economy, and every tenth new job in Norway in 2017 was in the tourism industry. This is the same figure as for 2016.

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

The importance of tourism to Norway



**4,3%
GDP**



7 of 100 jobs in
tourism
industry,
represents 166,400 employed



177 bill.
Total tourist expenditure



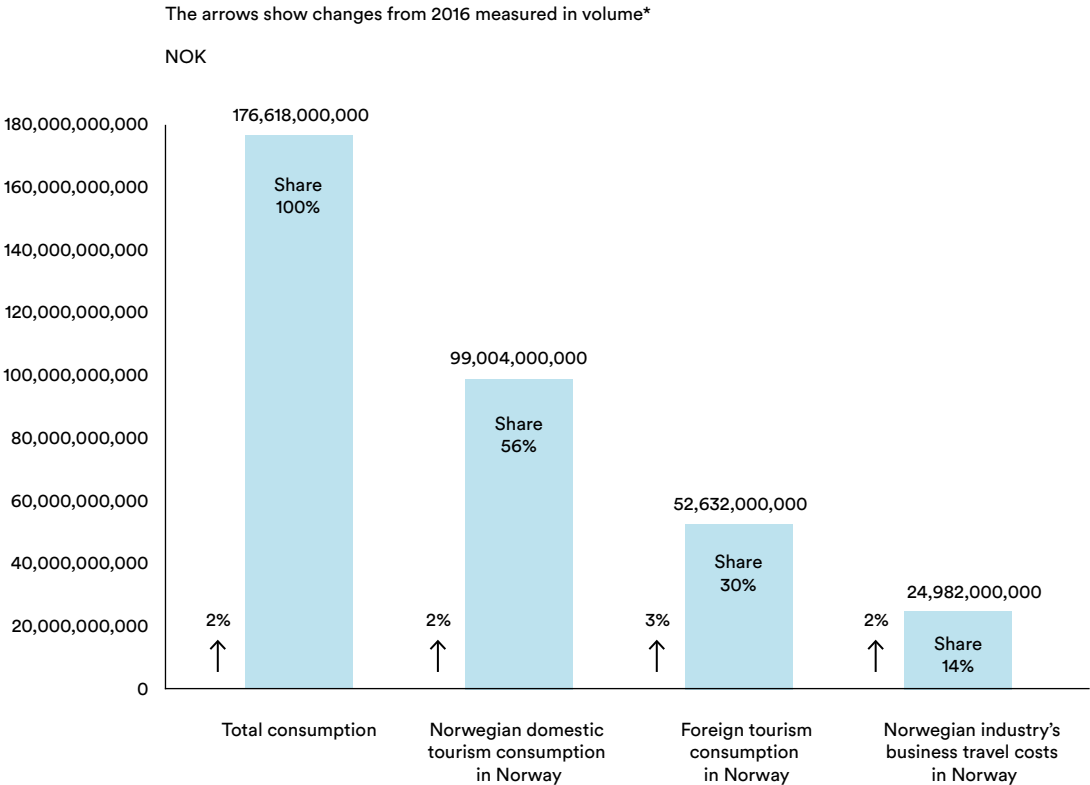
**53
bill.**

Foreign visitors' proportion
of total tourism expenditure
amounts to 30 per cent

Each year Statistics Norway publishes satellite accounts for tourism, which aims to say something about the economic impact of tourism on the Norwegian economy.

The importance of tourism to Norway increases at the same pace as the rest of the Norwegian economy

Total tourism consumption increases by four per-cent, from NOK 170 billion to almost NOK 177 billion. Adjusted for price change in the period, the growth is two percent.



*Volume growth is adjusted for price changes
Source Tourism satellite accounts, Statistics Norway

Good development from 2007

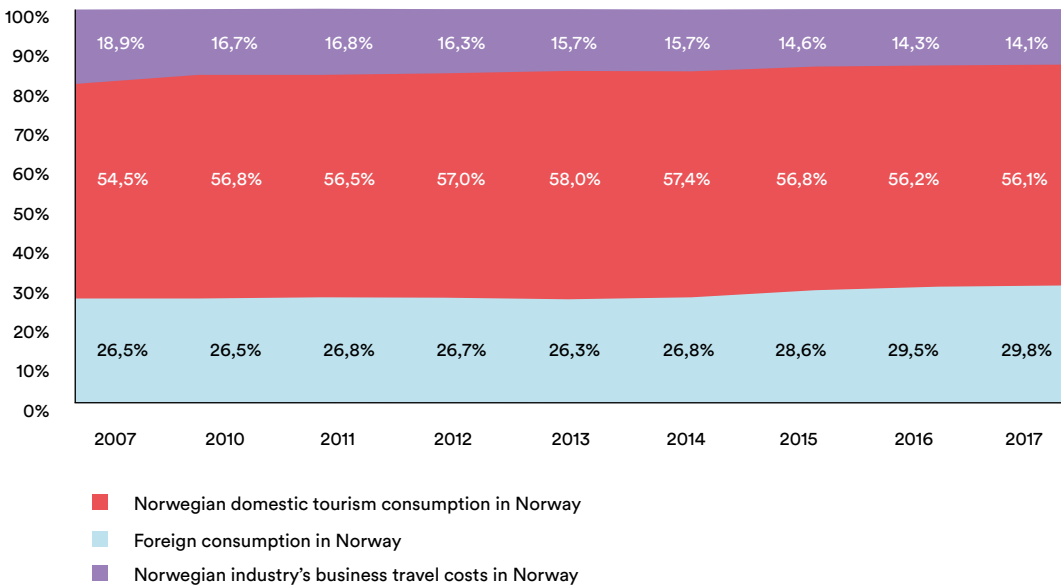
From 2007, which is the year before the financial crisis, the overall tourism consumption has increased by 33 percent. Foreigners' consumption has increased by 40 percent. This is a high figure considering that there are far fewer foreign tourists in

Norway than Norwegians. In addition, Norwegian industry's business travel costs in Norway are also included in the figures. Of the increase of NOK 30.9 billion, the contribution from foreigners is NOK 14.7 billion, representing 48 percent of the growth.

Note the growth in foreign consumption from 2013. Not only does it increase, but growth is greater than from the domestic market.

Foreign tourists contributed half of the growth from 2007 to 2017

Share of tourist consumption in Norway



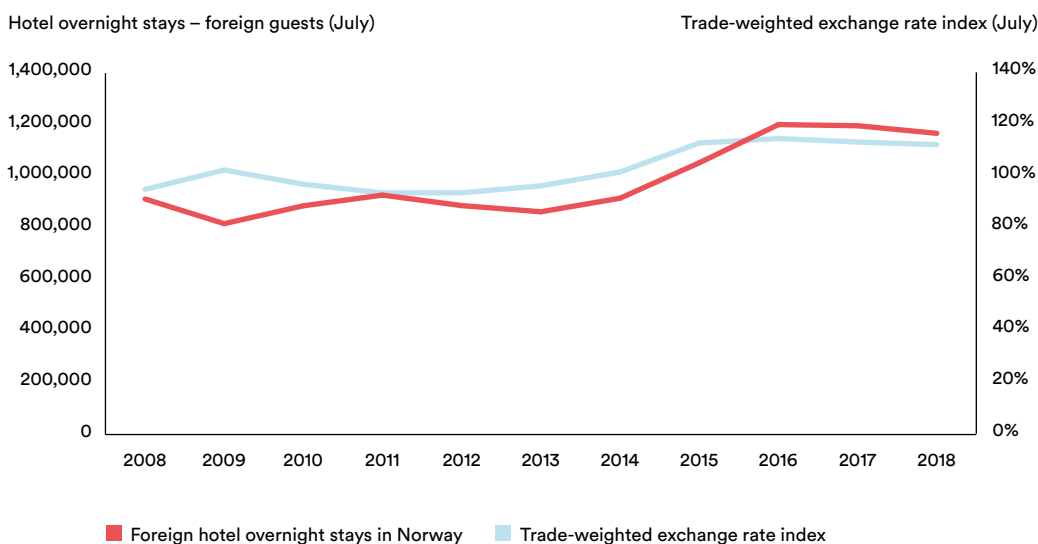
A weakened NOK exchange rate gives tourists more for their money

In recent years, the Norwegian kroner has been relatively weak against the Euro, GBP, U.S. dollar and the Danish and Swedish kroner. Tourism is an export industry, which benefits from a weak Norwegian Kroner exchange rate. Norway's ability to compete can be measured using the trade-weighted exchange rate index. A rise in this index means a weaker kroner, thus making Norway more

competitive, and vice versa. The weaker the kroner exchange rate, the more competitive Norway becomes.

This in turn means that foreign tourists get more for their money in Norway. There is also a clear correlation here. When the kroner exchange rate goes down, foreign overnight stays go up.

The development of the competition Index and foreign overnight stays follows each other



Overnight stays in July are used to isolate holiday traffic from business traffic, which is not affected.

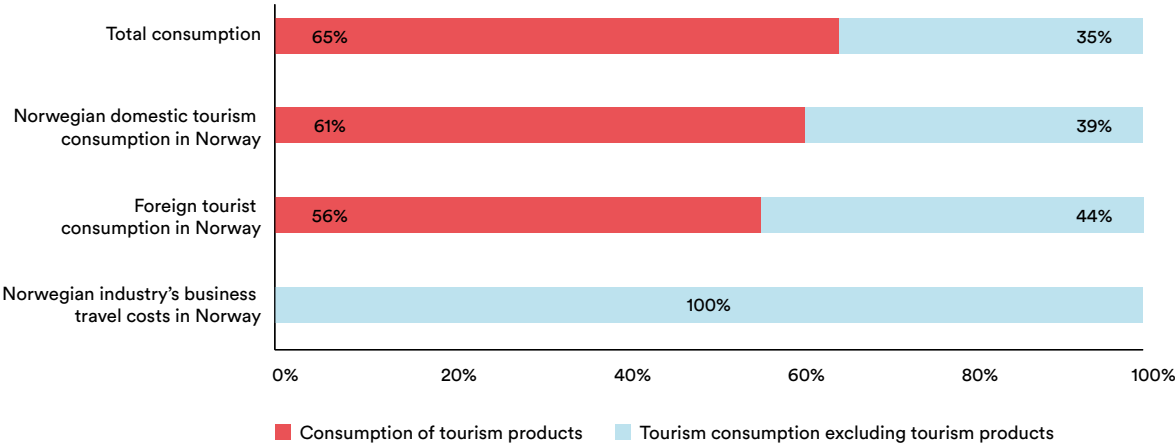
Source: Statistics Norway and Norges Bank

Tourists' contributions to the Norwegian economy not only benefit the tourism industry

The tourism industry is defined as accommodation, transportation, food and beverage services, travel agency and tour operator services, as well as cultural and entertainment services. 65 percent of all consumption is spent on these industries, while 35 percent goes to other

industries. If we look only at foreign tourists, they spend a greater amount of money than Norwegian tourists during their holidays here, on goods and services that are outside of the tourism industry.

What do they spend the money on?



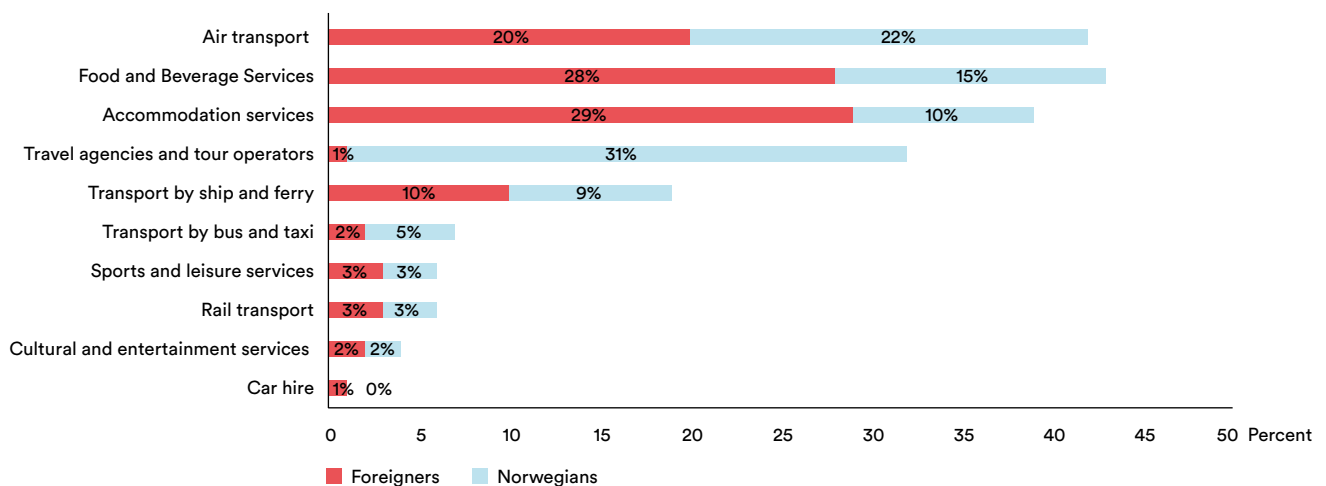
Consumption is distributed differently between foreigners and Norwegians

What is interesting is how consumption is distributed between foreigners and Norwegians. If we look at what tourists spend money on in the way of tourism products, foreigners spend most on accommodation, food and beverage services and air travel, while 44 percent goes to the consumption of goods and services that are exclusive of what are defined as tourism products in Norway.

31 percent of Norwegians' consumption goes to travel agencies and tour operator services, with air transport in second place. 39 percent of consumption goes to goods and services other than tourism products.

A closer look at how the consumption of tourism products is distributed

The graph is sorted according to total expenditure





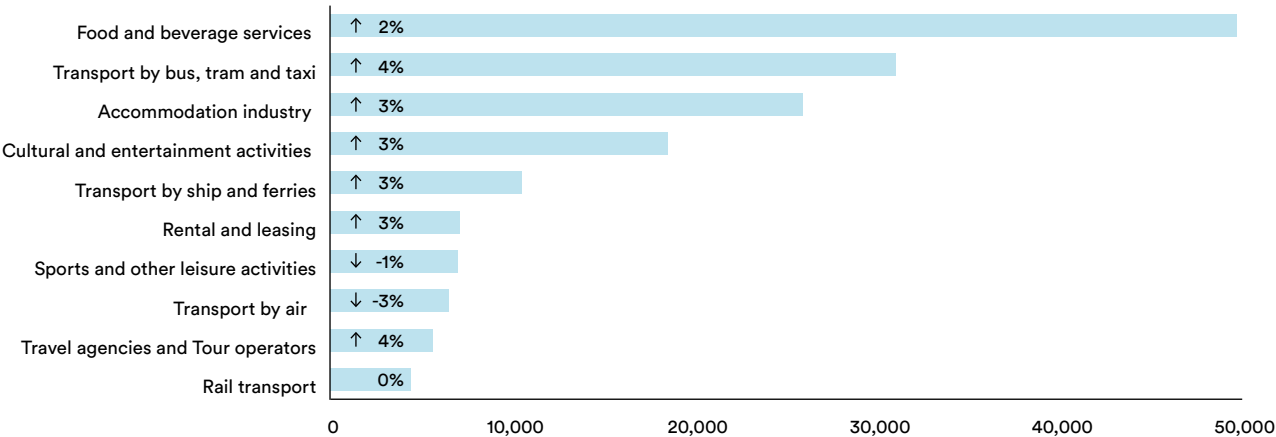
More employed persons in the tourism industry

The tourism industry employed 166,400 people in 2017. This is an increase of two percent, corresponding to 3,900 more employed persons. Transportation and food and beverage services have the most employees with a share of 31 and 30 percent respectively. Next come the accommodation industry that employs 16 percent of everyone in the tourism industry.

If you are interested to find out the number of employed persons in your county or municipality, these figures are available at www.visitnorway.no/innsikt

Employed persons in the tourism industry

The arrows indicate the change from 2016.





Tourism year 2018

International tourism and Norway's share

TOURISM YEAR 2018 gave a new record for global tourism.

The world's population travels like never before and statistics from UNWTO show that there were 1.4 billion journeys across borders, including one overnight stay or more. This is an increase of six percent from 2017. This means that the number of international arrivals reached 1.4 billion two years before UNWTO's forecasts predicted, which in 2010 assumed an average annual growth of four percent.

Despite the record; 2018 is the second year in a row where growth to Norway is lower than average growth both in the world, and to Europe.

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

Europe is still most frequently visited

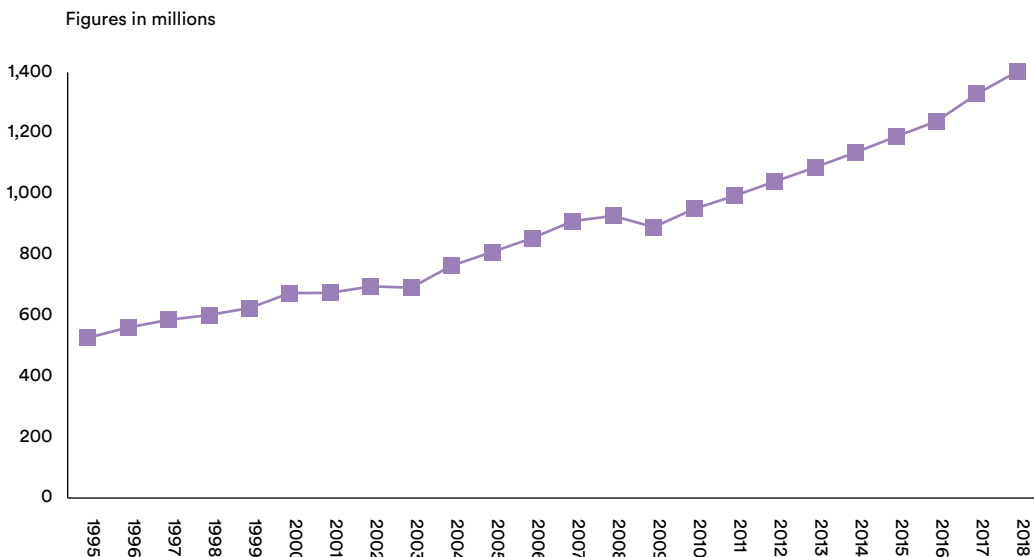
Europe, which accounts for more than half of all arrivals, is still the most visited continent. This has always been the case, but the market share is declining. In 2018, Europe's

market share was 50.8 percent, in 2014 it was 52 percent, while in 1980 it was 63 percent.

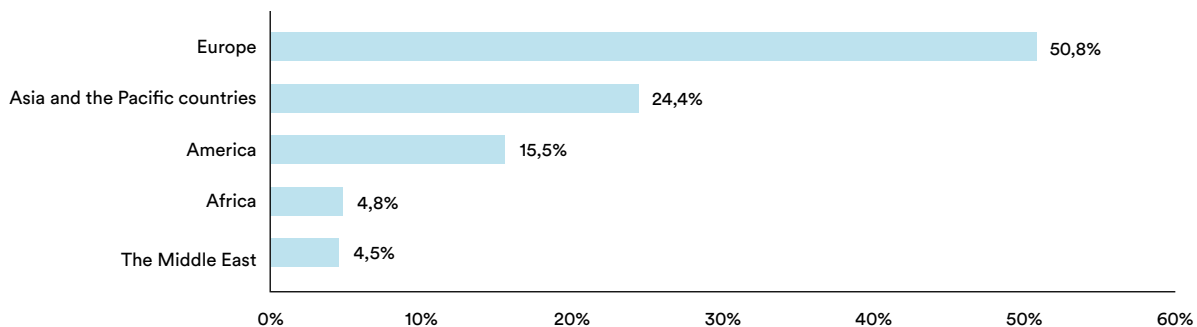
New record for global tourism

International tourist arrivals with at least one overnight stay.

There were 1.4 billion trips across national borders with at least one overnight stay in 2018.



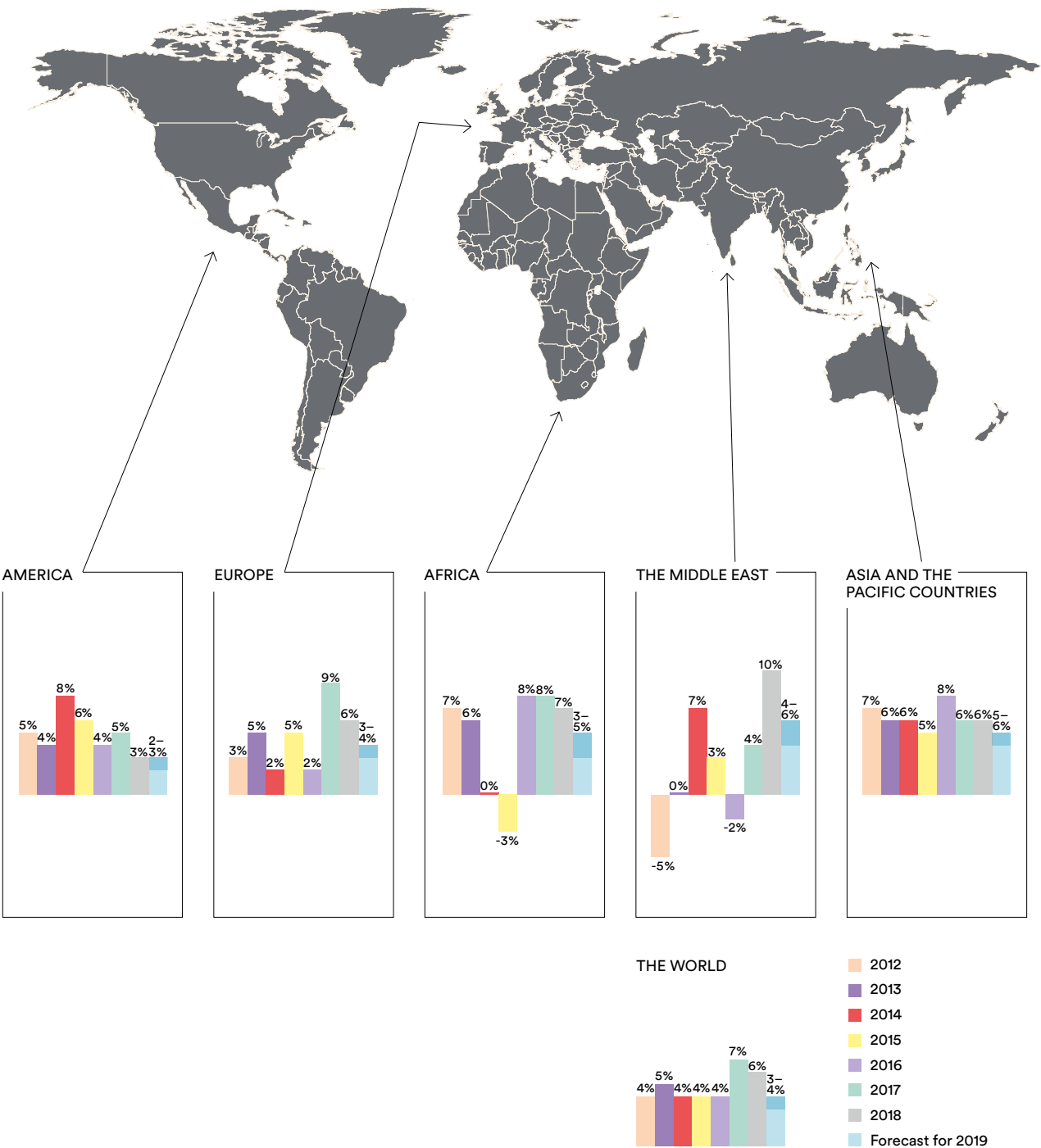
Breakdown of international tourist arrivals





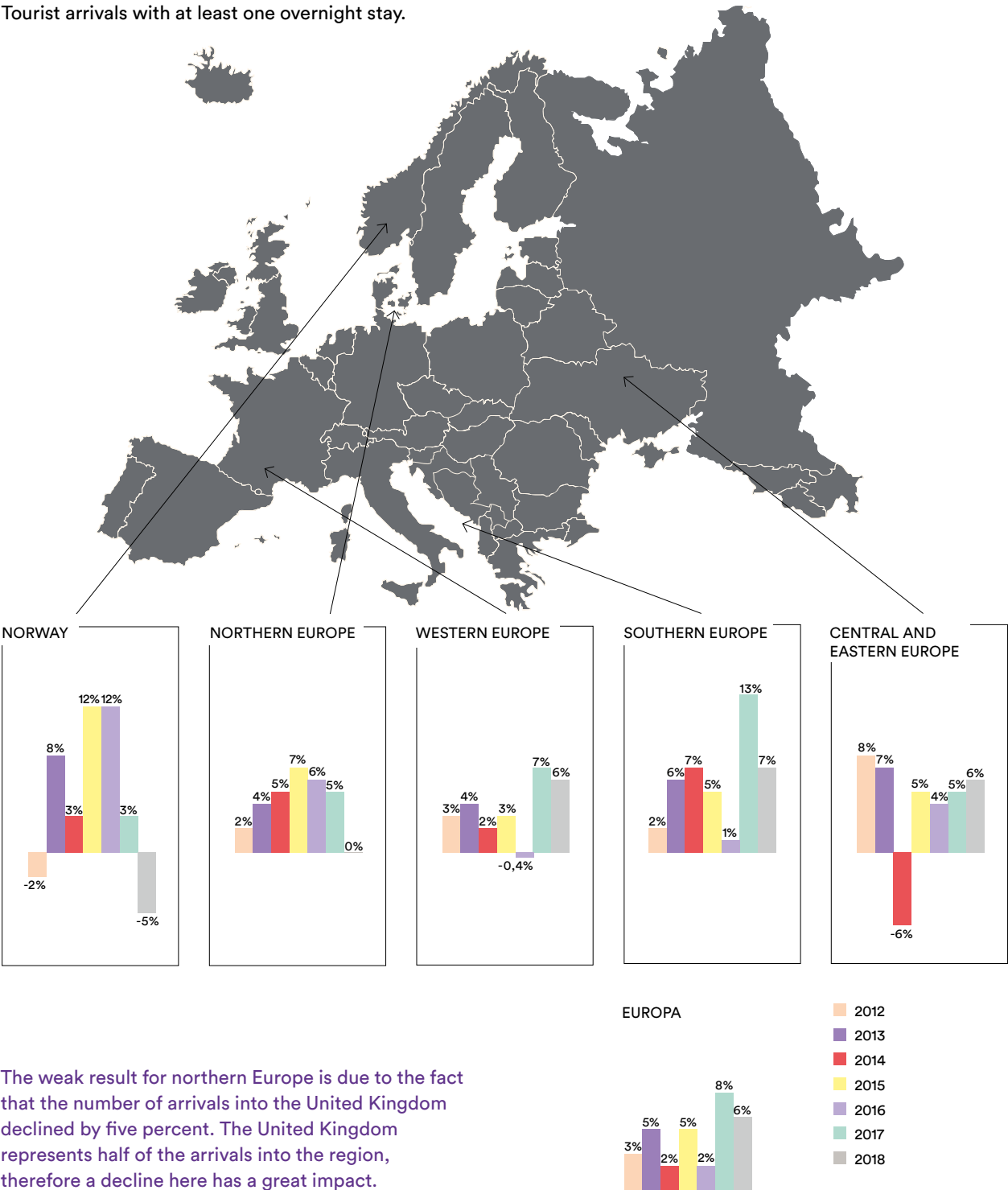
Changes in the number of tourist arrivals globally

Tourist arrivals with at least one overnight stay.



Changes in the number of tourist arrivals in Europe and Norway

Tourist arrivals with at least one overnight stay.

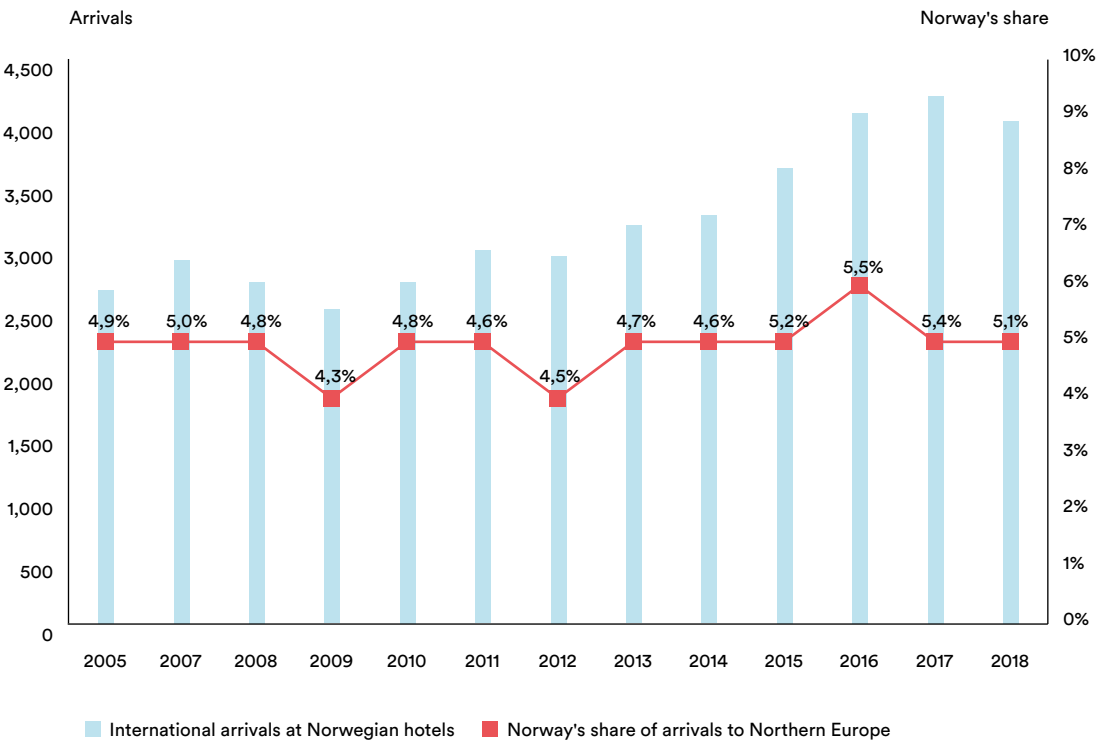


Arrivals into Norway decline

After two strong years, when arrivals into Norway increased more than the rest of the world and our neighbouring countries, the trend turned in 2017. Then arrivals into Norway also increased, but at a slower pace. Figures for 2018 show that foreign arrivals to Norwegian hotels decreased by five percent. Arrivals to Europe lie at

six percent, but growth is not equally distributed within the region. Northern Europe has the weakest result with a modest 0.2 percent. Arrivals to the UK (-5%), that represent half of the arrivals into the region, is the cause of the region's low figures.

International tourist arrivals at Norwegian hotels and Norway's market share in Northern Europe

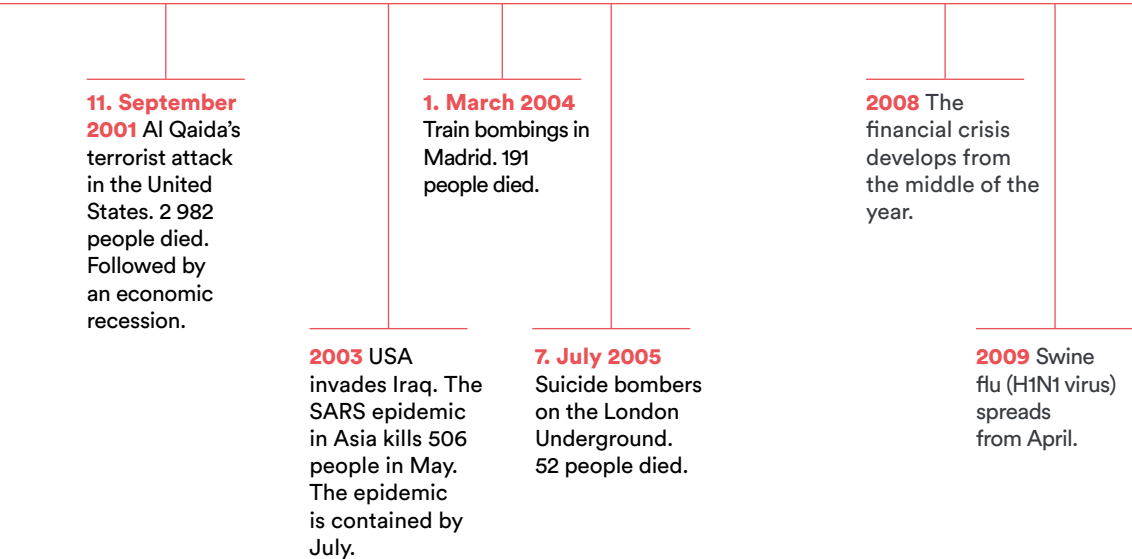




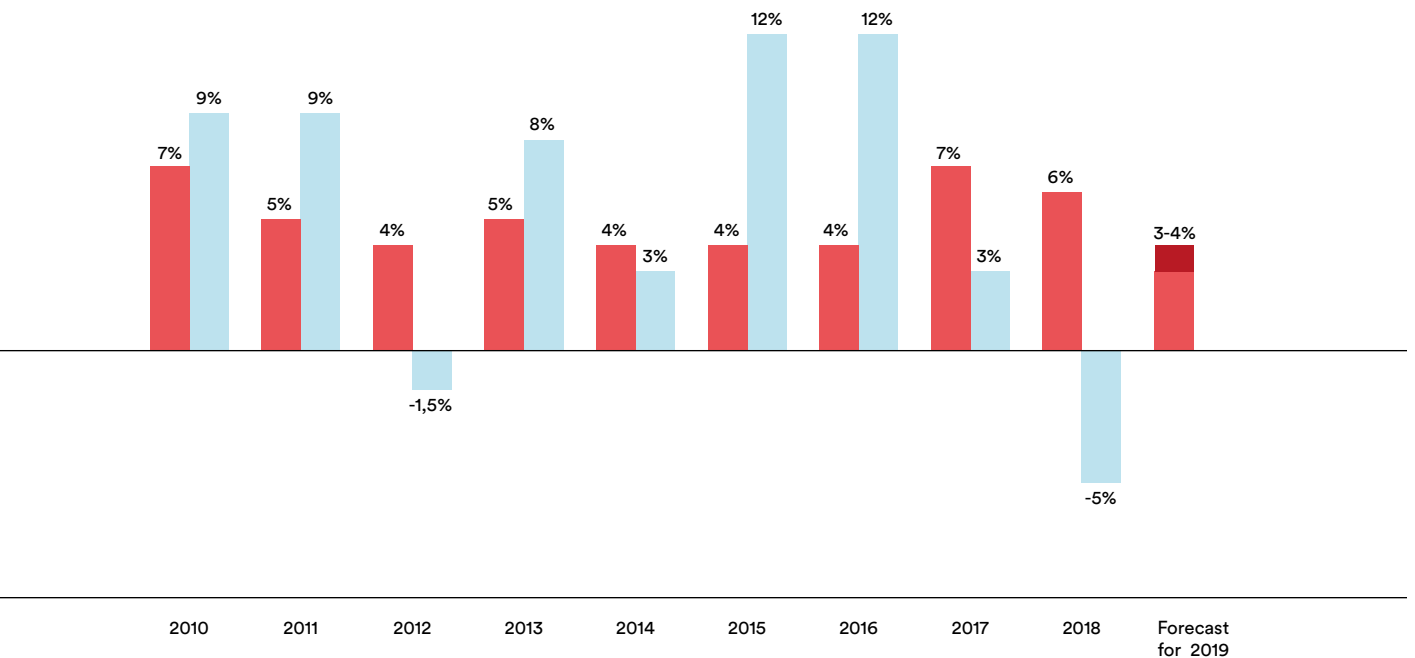
Arrivals in the world and at Norwegian hotels



Some events and acts of terrorism that may affect tourism



■ International tourist arrivals
 ■ International tourist arrivals at Norwegian hotels



2010
Volcanic eruption in Iceland in April.

22. July 2011
Terrorist attacks in Norway. 77 people died.

12. January 2016 Suicide attacks in a tourist area of Istanbul. 13 foreign tourists died.
28. June 2016 Suicide attack at the Ataturk airport in Istanbul. 36 people died.

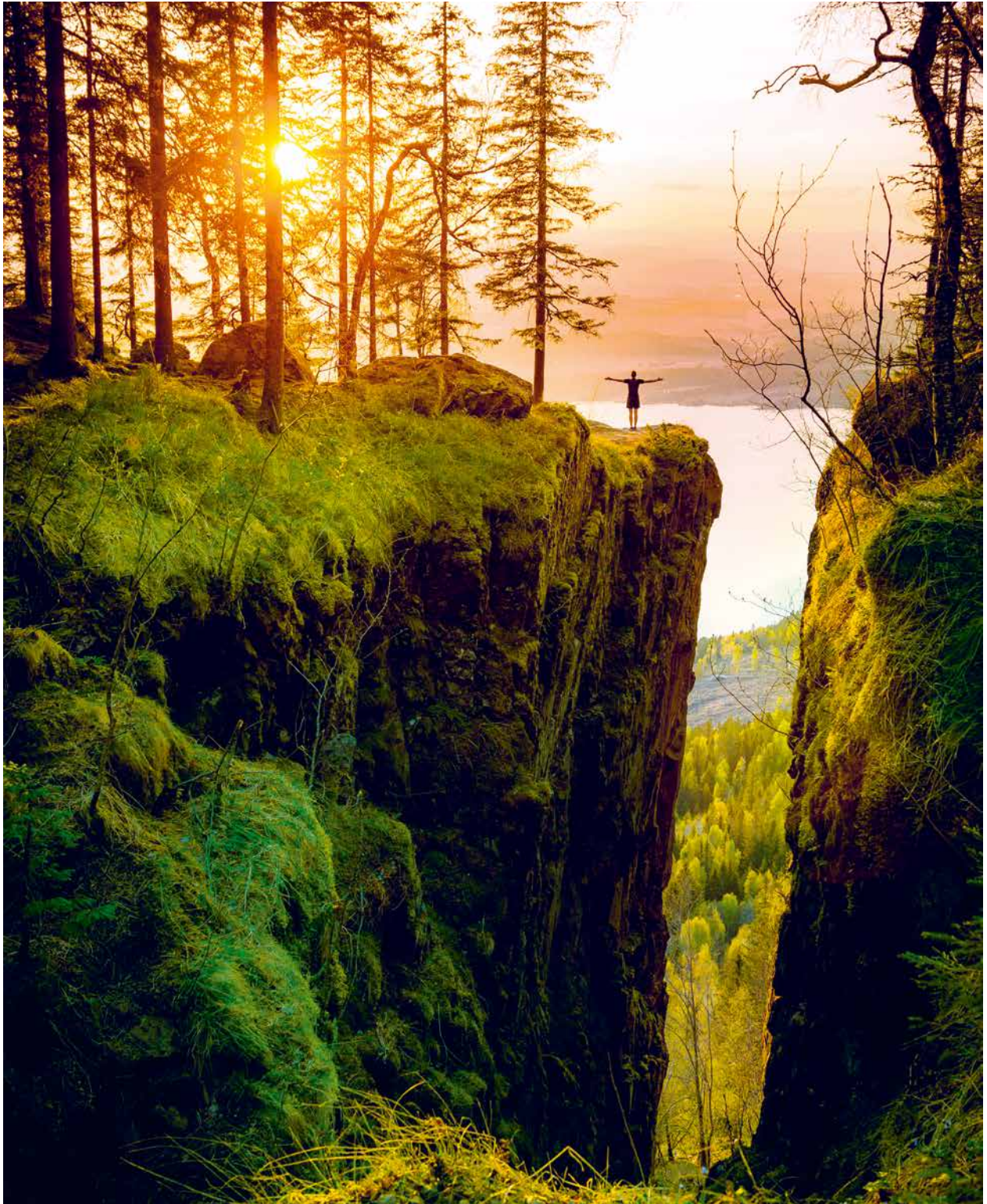
7. January 2015 Terrorist attacks against the satire magazine Charlie Hebdo's editorial offices in Paris. 12 people died.
14. February 2015 Terror at cultural centre and synagogue in Copenhagen. Two people died.
19. August 2015 Terrorist attack on tourist attraction in Istanbul, Turkey.
10. October 2015 Terror at the train station in Ankara. 500 wounded.
13. November 2015 Terrorist attacks various locations in Paris. 130 people died.

14. July 2016 Terrorist attacks on the promenade in Nice. 86 people died.
19. December 2016 A heavy goods vehicle drove into a Christmas market in Berlin. 12 people died.
31. December 2016 A man carried out an attack on a nightclub in Istanbul. 39 people died.

11. December 2018 Terrorist attack on Christmas markets in Strasbourg. Eight people killed.

Brexit affected the United Kingdom. Affected both entry and exit statistics.

22. March 2017 Terrorist attack at Westminster, London. 6 people died.
3. April 2017 Suicide attack in an underground carriage in St. Petersburg 14 people died.
7. April 2017 A truck drove into a department store in the pedestrian area in the centre of Stockholm. Five people died.
23. May 2017 Suicide attack after a concert in the Manchester Arena. 22 people died.
3. June 2017 A van drove into pedestrians on London Bridge, and then stabbed people in Borough Market. Seven people died.
17. August 2017 A van drove into the crowd in La Rambla street, Barcelona. 14 people died.



Tourism year 2018

Characteristics of the Norwegian tourism year

2018 WAS YET ANOTHER RECORD YEAR for Norwegian tourism. Norway is still considered to be one of the safest travel destinations in the world and the quest for Norway is increasing.

2018 was characterized by a good winter season with good snow conditions, and a glorious summer season with record temperatures in much of the country. Even with a good increase in the number of overnight stays during the winter months (+ 6%), tourism's challenges were further amplified with the greatest growth in the summer months (+ 2%). Of the 534,000 additional commercial overnight stays in 2018, 365,770 occurred during the summer season. That represents a share of 68.5 percent. The equivalent figure for 2017 was 66 percent.

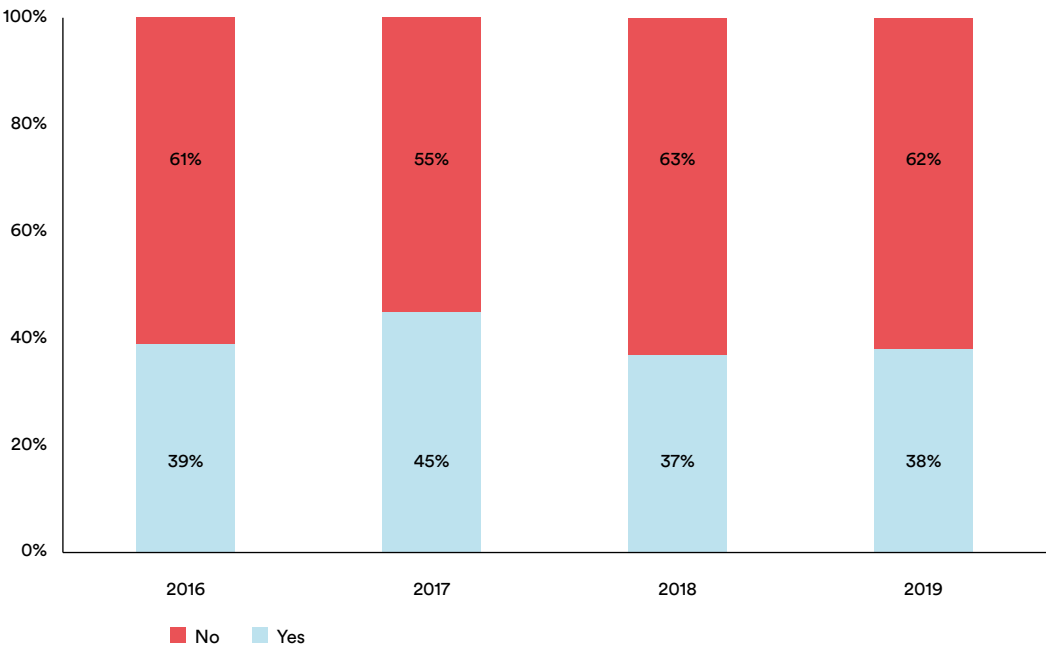
The trend from 2017 continues also in respect of an uneven distribution across the country. In 2018, Fjord Norway (+ 3%) and the counties of Eastern Norway (+ 2%) experienced an increase in the number of commercial overnight stays.

Norway is one of the safest travel destinations in the world

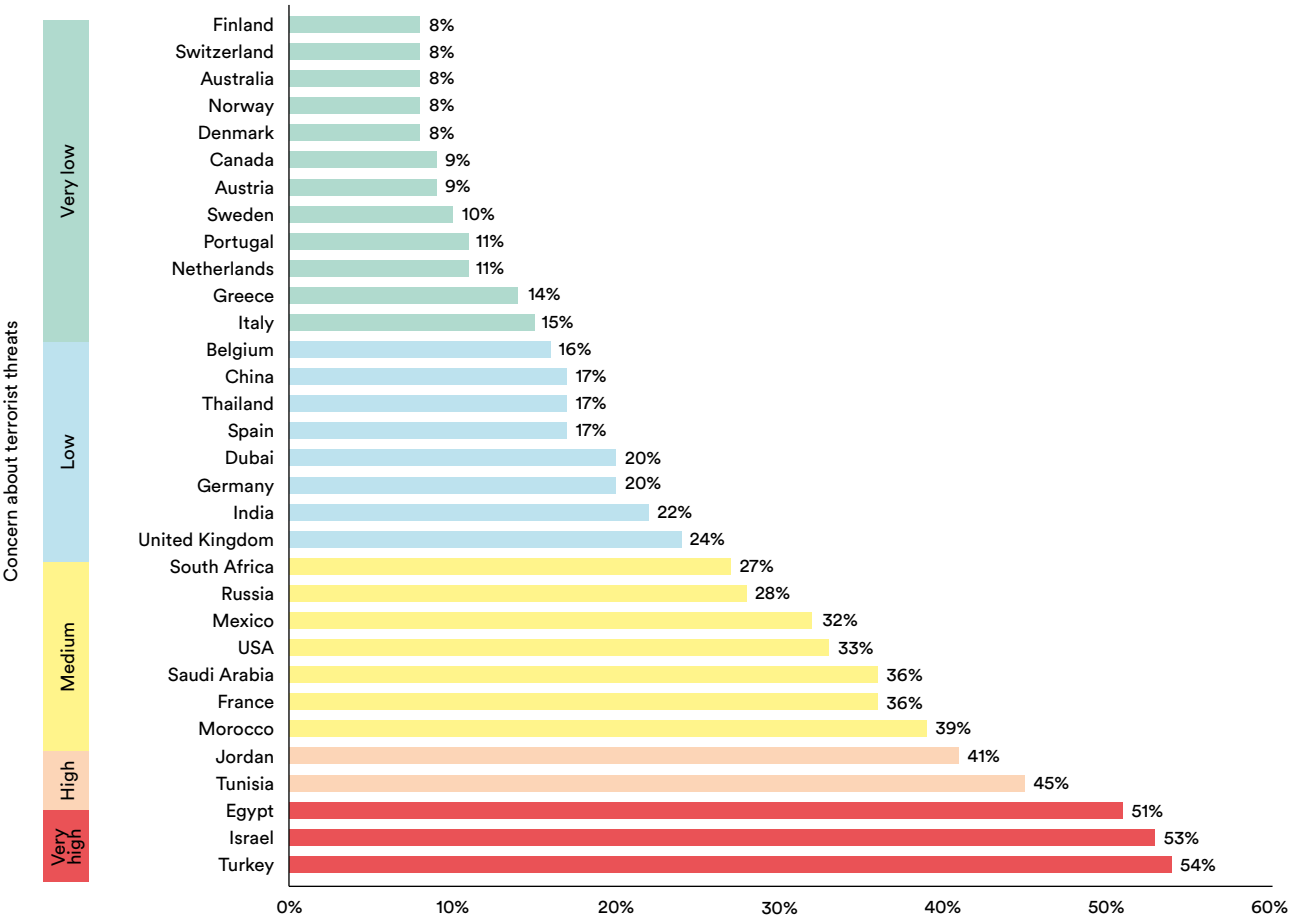
The fear of terror is still in the back of tourists' minds when they are planning their holidays and, at the beginning of 2019, 38 percent responded that fear of terrorism will have an impact on their choice of holiday destinations during the year. That is more than in 2018. As in previous years, Norway is considered to be one of the safest travel destinations in the world.

The analysis company IPK International conducts a World Travel Monitor® in 42 countries. In 2016, new questions were included, to find out more about the importance of terrorism for international tourism.

Question: Do terrorist attacks and terror alerts affect how you will travel during the next 12 months?



Question: Would you be concerned about terrorist threats if you travelled to the following destinations?



Increased interest in Norway is reflected in the increased number of searches for Norway online

Increased interest in Norway as a holiday destination is also reflected in the increased number of searches for Norway online. In 2018, there were 8.3 million tourism-related searches for Norway. This is an increase of 21 percent from 2017. Not surprisingly, most searches are from countries that already frequently visit Norway, such as Germany, the USA and UK. Spain and China are also high up on the list.

What do people search for when they are interested in holidaying in Norway?

Norway is also associated with this on online searches

scenic. Many search for fjords, glaciers and the Northern Lights, but also different types of accommodation, cities and outdoor activities.

Congresses and Conventions are increasing the most

In 2018, searches for Congresses and Conventions and sporting events increased the most. Increased interest in beer and local beer brewing is also reflected in searches for Norway. Searches for "Beer Tourism" have doubled.

Countries that most often search for holidays in Norway

	2017	2018	Change 2017–2018
Total number of searches	6,889,985	8,307,425	21%
Germany	798,413	988,172	23,8%
USA	688,760	787,871	14,4%
United Kingdom	537,627	562,384	4,6%
Spain	410,693	466,199	13,5%
China	212,978	353,345	65,9%
Sweden	267,253	324,840	21,5%
Netherlands	285,406	311,590	9,2%
Russia	186,902	222,524	19,1%
India	147,383	201,182	36,5%
Poland	169,438	199,924	18,0%
Japan	162,079	196,056	21,0%
Denmark	159,261	177,411	11,4%
Australia	115,942	135,245	16,6%
Austria	108,018	130,143	20,5%
Belgium	112,846	126,544	12,1%
Italy	101,827	121,444	19,3%
Canada	102,450	121,051	18,2%
Switzerland	101,704	116,289	14,3%
Brazil	82,202	103,398	25,8%
South Korea	79,778	103,280	29,5%
Other markets/the rest	2,059,025	2,558,533	24,3%

A report prepared by Bloom Consulting and commissioned by Innovation Norway shows the trend in searches for Norway as a tourist nation. The most widely used search engines in the world, which represent a share of 90 percent of all searches in the period are monitored.

Top 50 holiday-related keywords/phrases in 2018

Keywords	Number of searches	Keywords	Number of searches	Keywords	Number of searches
Fjords and Glaciers	1,156,045	Holiday Apartments	146,597	Beaches	28,930
Northern Lights	580,695	Tourism Attractions	130,687	Holiday Houses	28,369
Tourism	472,135	Things to Do	125,239	Holiday Rentals	27,728
Travel	469,930	Igloos Ice Hotels	71,054	Family Tourism	27,608
Camping	407,344	Midnight Sun	70,124	Bus Tours	26,786
Cruises	399,452	Natural Wonders	65,273	Angling	26,692
Cities	353,403	Cabins	55,569	Catamarans and Barges	25,565
Holiday Packages	330,009	Islands	54,712	Cathedrals	23,343
Places to Visit	310,902	Ski Resorts	54,128	Regions	22,759
Vacation Packages	257,037	Coastline	49,837	Lakes	22,005
Visit	229,423	Airbnb	48,861	Accommodation	21,770
Fishing	218,469	Road Trips	44,840	Surf	20,558
Skiing	202,532	Waterfalls	39,256	Bed and Breakfast	20,321
Hiking	198,280	Cottages	35,473	Kayaking	20,267
Tours	191,303	Hostels	33,099	Backpackers	20,121
Jungles and Forests	188,067	Cross Country Skiing	31,978	Restaurants	19,922
Hotels	185,552	Cycling	30,353		

50 keywords/phrases* with the greatest growth

Keyword	Increase 2017–2018	Keyword	Increase 2017–2018	Keyword	Increase 2017–2018
Congresses and Conventions	323,2%	Eco Tourism	40,2%	Cruises	33,4%
Sport Events	192,1%	Aquariums	39,7%	Ice Skating	33,2%
Beer Tourism	96,7%	Cafes	38,7%	Food Tourism	32,9%
Cross Country Skiing	89,9%	Tourism	38,4%	Catamarans and Barges	32,9%
Nature Reserves	86,6%	Rural Houses	38,1%	Bars and Pubs	32,7%
Snowboarding	70,6%	Telemark Skiing	38,0%	Saunas	32,5%
Wine Tourism	68,5%	Family Tourism	37,9%	Cities	32,4%
Guided Tours	66,8%	Adventure Parks	37,7%	Caravans	31,2%
Shopping Outlets	63,7%	Holiday Villages	36,9%	Wood Houses	31,1%
Beach Resorts	59,2%	Caves	36,1%	Boat Rentals	30,6%
River Cruises	57,9%	Sledding	36,0%	Things to Do	30,6%
UNESCO Tourism	53,7%	Sky Diving	35,1%	Bird Watching	29,7%
Airbnb	52,6%	Springs	35,1%	Places to Visit	29,4%
Islands	48,2%	Wildlife	35,1%	Coastline	29,3%
Midnight Sun	43,9%	Hunting	34,1%	Camping	29,2%
Road Trips	43,3%	Volcanoes	33,8%	Pilgrimage	28,6%
Road Tours	40,6%	Tents	33,6%		

*Keywords/phrases with more than 1,000 searches in the period

Source Bloom Consulting

New record in commercial overnight stays

There were 33.8 million overnight stays in commercial accommodation in 2018. That is an increase of 1.5 percent, which means just over half a million more overnight stays. Norwegian tourism has had a good development in recent

years. Especially from 2013, the number of overnight stays has increased by 4.6 million, which equals a growth rate of 16 percent. The number of Norwegian stays has increased by 10 percent, and foreign stays by 32 percent.

Markets in which Innovation Norway promotes tourism

The table is arranged according to the largest share in 2018

	2007	2010	2013	2016	2017	2018	Share 2018	Change 2017/2018	Change 2007–2018
Total	28,663,930	28,540,497	29,243,016	33,114,132	33,296,767	33,812,674	100%	2%	18%
Norway	20,338,157	20,637,311	21,551,330	23,387,248	23,348,139	23,684,456	70%	1%	16%
Total foreign	8,325,773	7,903,186	7,691,686	9,726,884	9,948,628	10,128,218	30%	2%	22%
Germany	1,703,050	1,637,206	1,309,550	1,687,582	1,725,066	1,830,027	18%	6%	7%
Sweden	912,915	958,838	999,339	1,189,888	1,168,554	1,126,646	11%	-4%	23%
USA	330,727	315,436	303,199	496,626	671,385	815,656	8%	21%	147%
Denmark	1,006,816	914,053	835,121	828,916	776,196	757,113	7%	-2%	-25%
Netherlands	873,342	799,515	519,989	658,478	716,308	735,973	7%	3%	-16%
United Kingdom	755,172	520,428	581,496	734,876	716,930	627,203	6%	-13%	-17%
China	70,694	68,133	161,878	392,529	476,767	450,827	4%	-5%	538%
France	291,826	318,280	285,525	372,107	382,769	414,147	4%	8%	42%
Spain	313,766	245,638	174,862	304,303	346,610	342,877	3%	-1%	9%
Italy	228,275	222,540	164,254	235,288	250,876	271,612	3%	8%	19%
Switzerland	121,970	133,159	139,545	204,456	225,576	234,924	2%	4%	93%
Belgium	65,857	88,866	81,671	130,164	145,375	148,671	1%	2%	126%
Russia	130,434	172,811	211,805	105,285	123,604	133,851	1%	8%	3%
Australia	41,620	43,917	61,294	87,498	113,341	122,733	1%	8%	195%
Austria	64,536	76,045	67,776	98,760	97,424	112,046	1%	15%	74%
South Korea	40,609	38,008	57,042	88,157	120,540	104,921	1%	-13%	158%
Japan	115,962	104,014	103,882	111,579	111,976	104,463	1%	-7%	-10%
Brazil	13,847	22,882	38,999	35,582	68,167	50,485	0%	-26%	265%

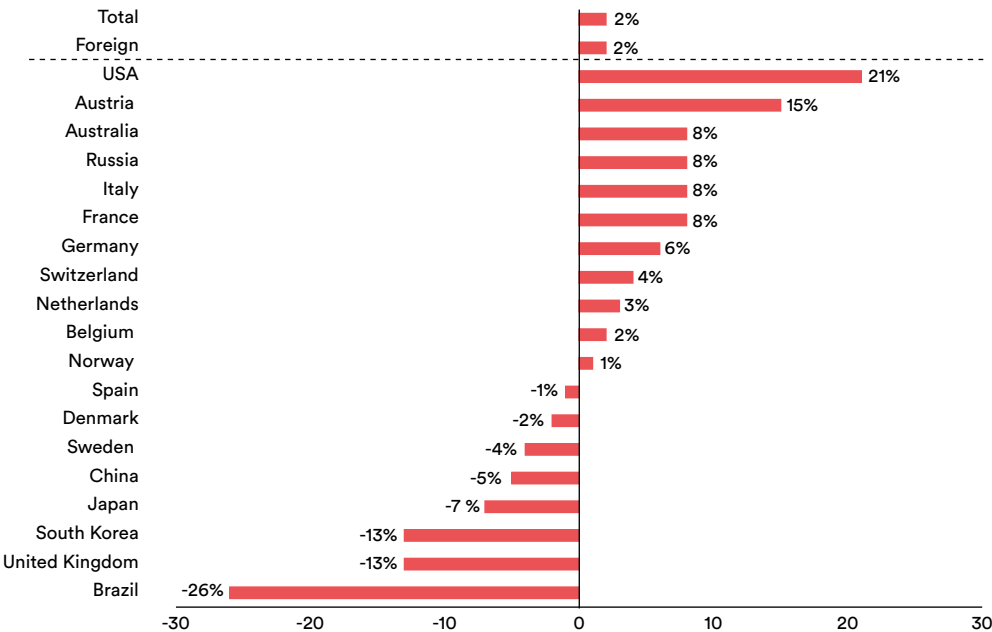
Composition of foreign overnight stays

The domestic market continues to be the most important for Norwegian tourism, but it does not grow at the same pace as the foreign markets, which take an increasing share of the market each year. In 2018, the United States is for the first time the third largest foreign market, ahead of Denmark, the Netherlands and the United Kingdom, and is

the market that has grown fastest in recent years. Only last year the United States was in sixth place in the survey of the largest markets. Another distinctive feature of the year that is worth highlighting is the decline from China by six percent. This means that the continuous growth in Chinese overnight stays in Norway from 2010 has been broken.

Percentage change markets

Change 2017–2018

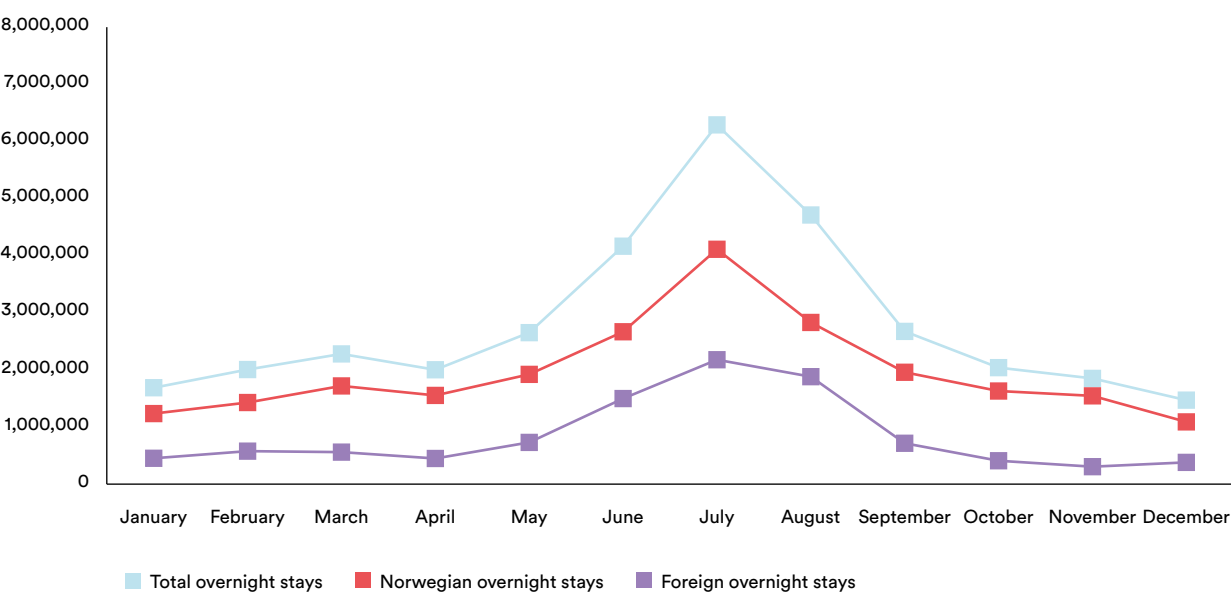


Commercial overnight stays throughout the year

The 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 also these months that have had the largest growth in recent years. There were

532,000 more overnight stays in 2018, and 68 percent of these were in the summer season. The equivalent figure for 2016 and 2017 was 66 percent.

Development in commercial overnight stays throughout the year



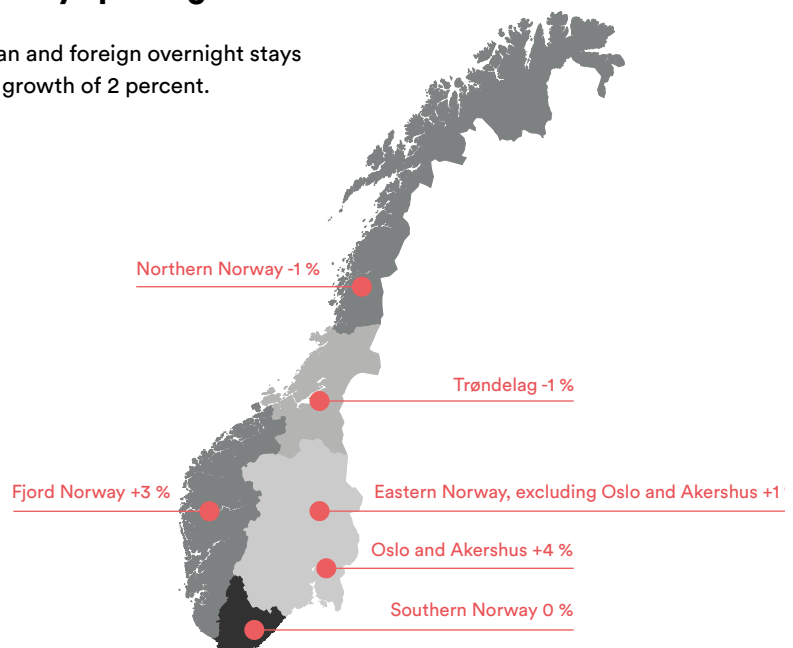
Increased number of overnight stays in Eastern Norway and Fjord Norway

The capital city and Fjord Norway have experienced good growth in both the summer and winter seasons. The remaining counties of Eastern Norway increased by one percent, mainly due to a good winter season.

The decline in Northern Norway maybe due to bad weather, which resulted in Norwegians failing to visit the region during the summer season.

Share of commercial overnight stays per region

The illustration shows the change in Norwegian and foreign overnight stays 2017-2018. The country as a whole had a total growth of 2 percent.



The world's population travels ever more frequently, and more people come here

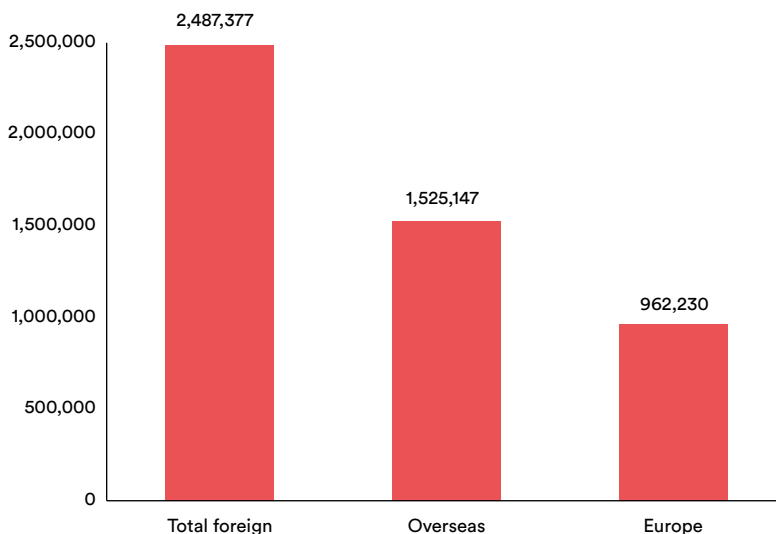
Figures from UNWTO show that the world's population travels more and more each year. Better and cheaper flights has meant that every little nook and cranny in the world is accessible for tourists, and more nationalities are also finding their way to Norway.

In 2005, 11 percent of all foreign commercial overnight stays were from countries outside Europe. Now this share is 23

percent. So not only will there be more visitors to Norway, but growth from overseas markets is greater than that from European markets.

From 2005 until 2018, the number of foreign overnight stays has increased by 2.5 million. A total of 1.5 million, corresponding to 61 percent, are from countries outside Europe.

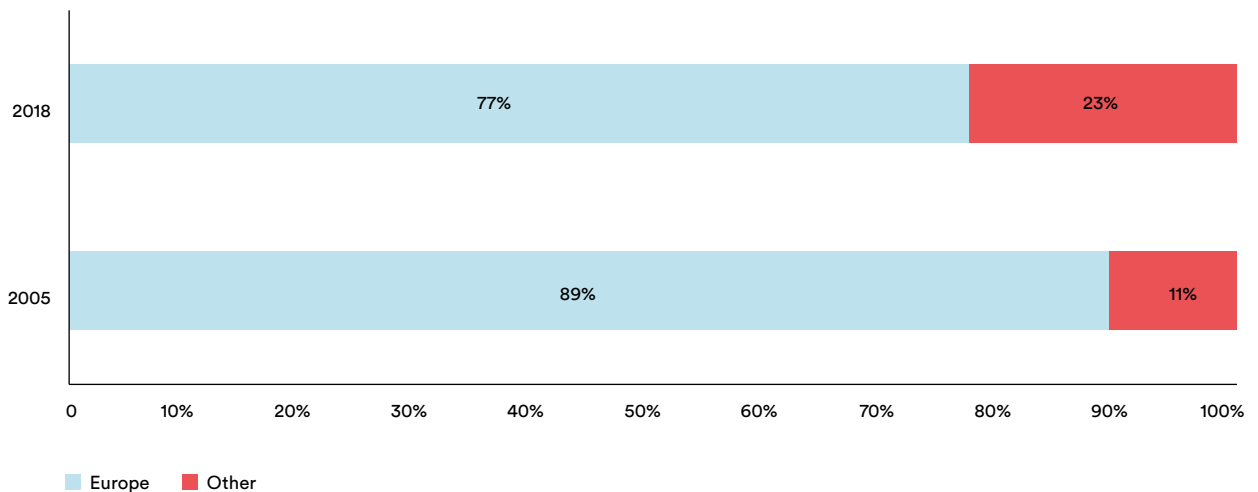
Development of foreign overnight stays from 2005–2018





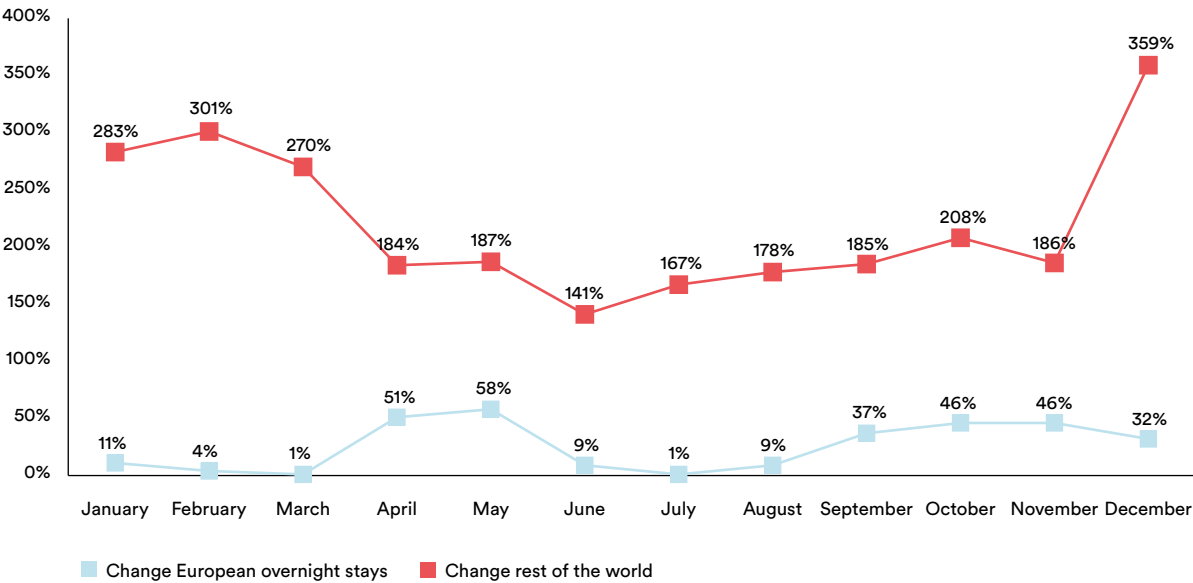
Development in overnight stays from countries outside Europe

The domestic market does not grow at the same pace as the foreign markets, which take an increasing share of the market each year. In 2005, 11 percent of all overnight stays were from countries outside Europe, in 2018 the share increased to 23 percent.



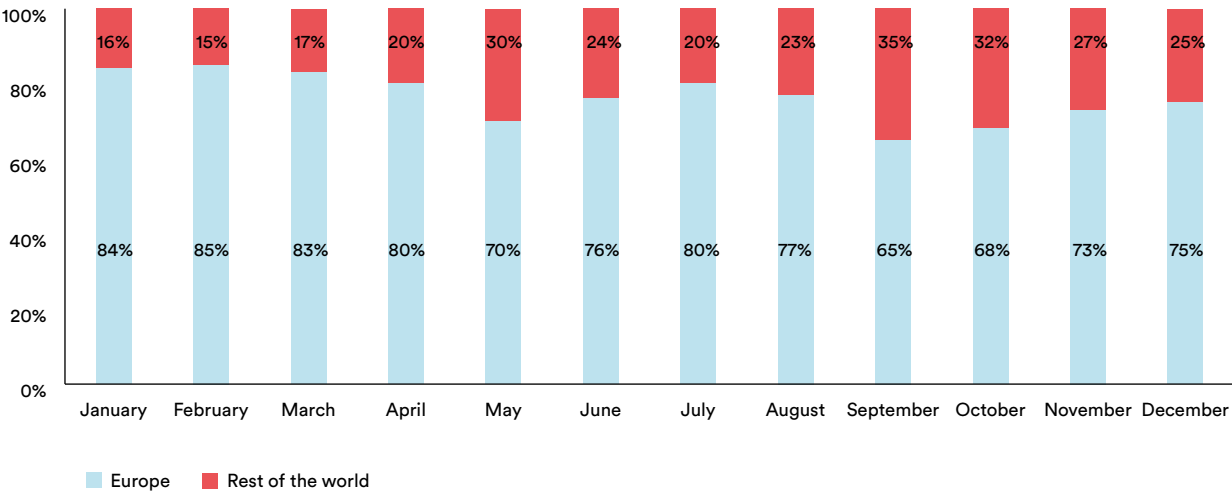
Development in foreign commercial overnight stays

Growth from foreign markets is strong throughout the year



Composition of the foreign overnight stays per month

The considerable growth from foreign markets contributes to a change in the composition of foreign overnight stays. In particular, growth has resulted in months such as May, September, October, November and December, constituting a significant proportion of foreign overnight stays.







Tourism year 2018

Opinion of Norway as a holiday destination and characteristics of those who visit us

NOT ENOUGH to be beautiful.

The strongest associations people have to Norway are related to nature with fjords, mountains and the Northern Lights. Norway has a strong position in nature-based tourism, but if everyone who connects Norway with beautiful nature were to visit us, there would have been more tourists here. These associations must be expanded to attract more travellers with a high daily consumption, all year round. We need to tell stories about a Norway that offers interesting culture and history, and a variety of culinary experiences. That Norway is also a place for urban experiences and that we, as people, are welcoming and hospitable. At the same time, Innovation Norway's brand tracker shows that it is becoming ever more important to demonstrate that we have sustainable alternatives.

On the right path

The same survey shows that now more people than ever before associate Norway precisely with these statements. This is also reflected among those who visit us. They are looking to experience both culture and nature. It's no longer a case of one or the other, but both please.

Fjords, mountains and natural phenomena are the most common associations with Norway

The word cloud is based on the following question: "What is the first thing that comes to mind when you think about Norway as a travel destination and about holiday experiences in Norway?"

Top-of-mind results on Norway as a tourist destination

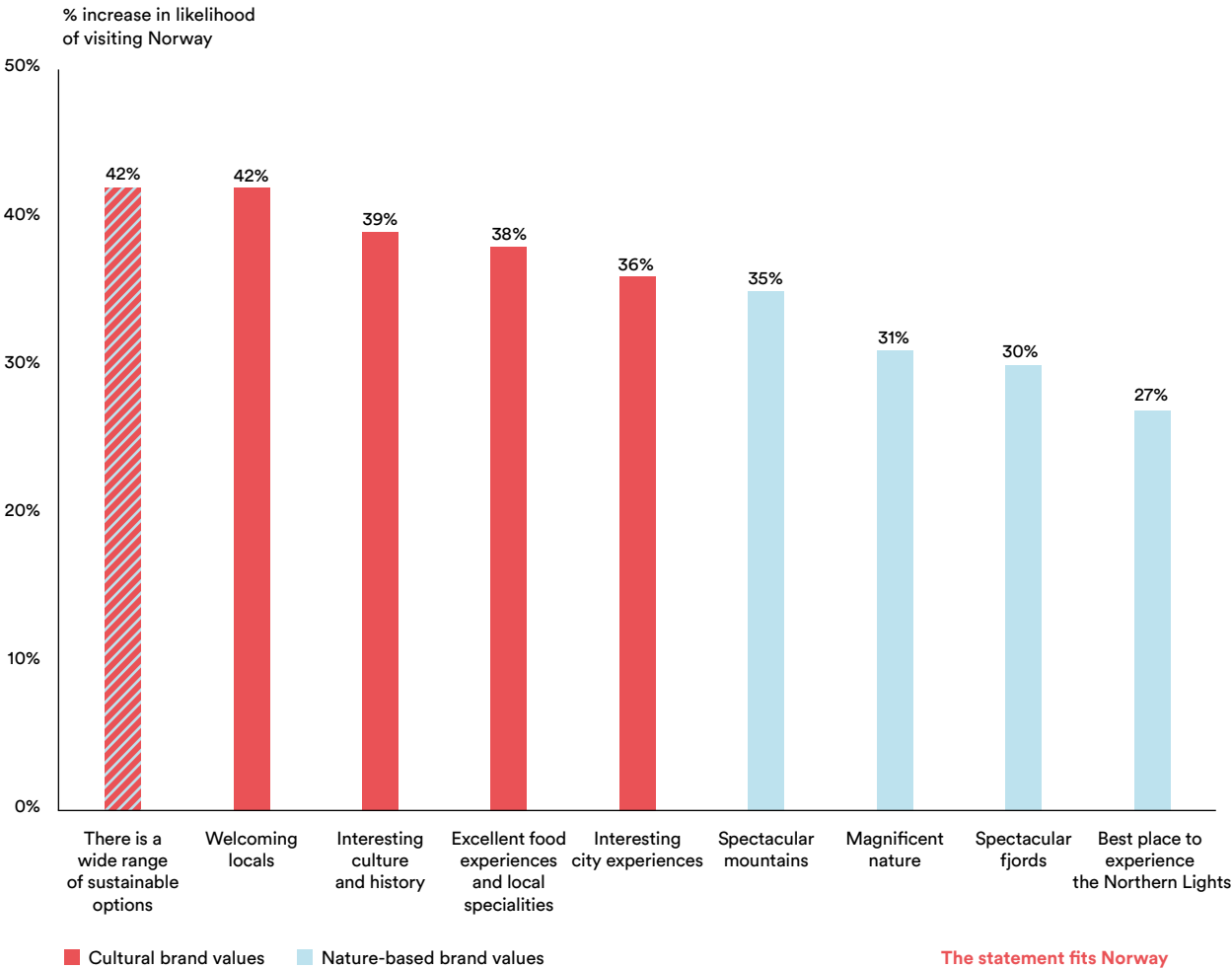


The link between culture and nature is very important

The chart shows that if we show more clearly that we can offer a wide range of sustainable options, the likelihood of travelling here increases by 42 percent. The same applies to associations that Norwegians are hospitable. If we can demonstrate that there are good opportunities to

experience interesting culture and history, the desire to travel increases by 39 percent. This is an indication that the link between culture, nature and sustainability is very important for Norway as a holiday destination in the future.

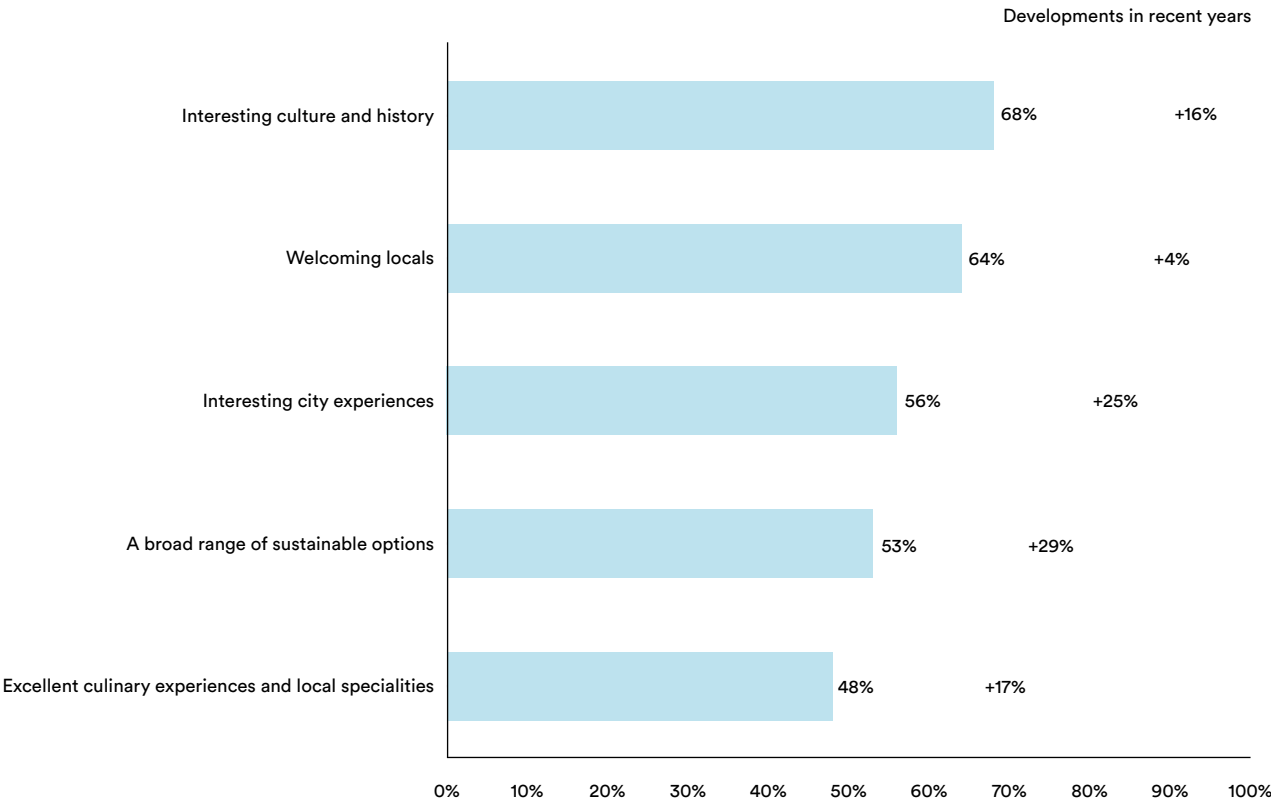
The likelihood of visiting Norway increases, when foreign tourists agree that the statement is relevant to Norway



Norwegian tourism on the right path

In recent years, Norwegian tourism has managed to move the target group's perception of Norway in the right direction. In 2018, 68 percent associated Norway with interesting culture and history. That is 16 percent more than a few years ago. More associate Norwegians with hospitality and 25 per cent more are sure that a holiday in Norway also offers exciting city experiences.

A Norwegian holiday is associated with more than just nature



Culture and nature hand in hand

– Many who visit us today come to experience both culture and nature.

A large proportion of holiday tourists in Norway considers that one or more cultural activities are important to the holiday, but often in combination with natural activities. Only about three percent of the foreign tourists are exclusively interested in cultural activities. Norway has a well-established position in nature-based tourism, so experiencing nature is important for most people spending their holidays here. The desire to experience culture comes in addition.

Cultural activities drive expenditure and value creation

In contrast to natural activities, which in most cases are free of charge, that result in low spending, cultural activities contribute to increased spending. This is precisely the reason why the combination of cultural-and nature-based activities is important, since it contributes to a greater extent to value creation.

Day Trip to Innerdalen
Thomas Rasmus Skaug
Visitnorway.com

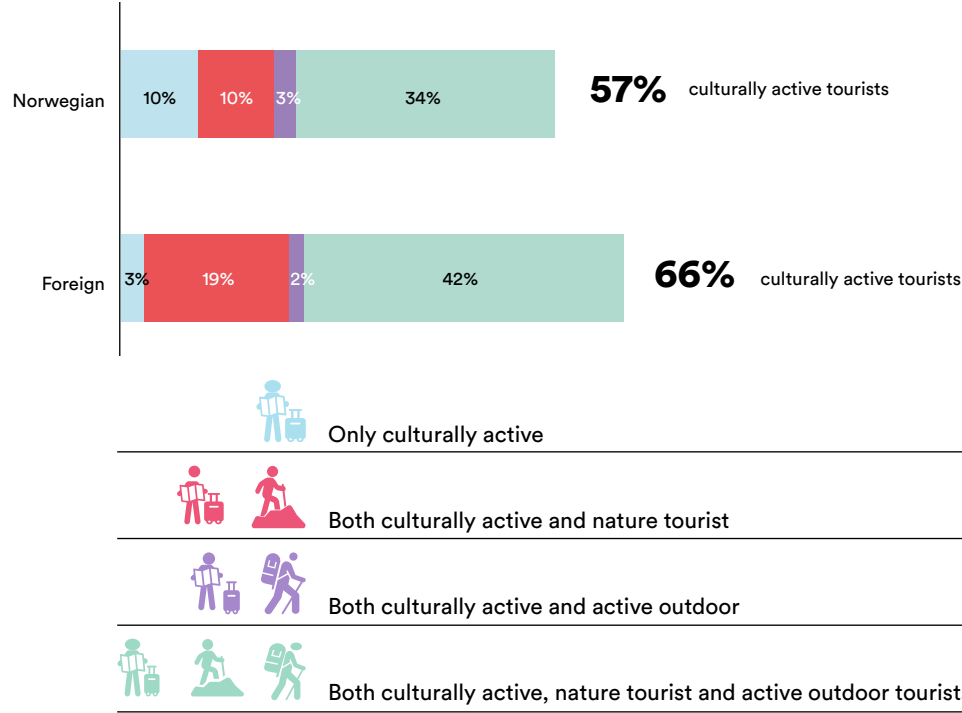


Culture fans are also interested in nature experiences

A large proportion of holidaymakers choose to combine several different types of activities and experiences during their stay in Norway. This is especially true of the foreign visitors, 42 percent of which respond that both culture, nature and outdoor activities are very important for them during their Norwegian holiday.

Only three percent of the foreign holidaymakers and ten percent of the Norwegians are solely interested in cultural experiences.

Combinations of activities/experiences



Different types of travellers are defined based on those who have stated...



The culturally active tourists

... that at least two of the following activities are "very important " for a holiday in Norway:

- Culinary experiences
- Visit historic buildings/sites
- Experience modern art
- Experience festivals, national celebrations and national events
- Visit theatre, ballet, concerts or opera performances
- Visit museums
- Experience local culture, lifestyle & traditions
- Discover the city and the life of the locals



Active outdoor tourists

... that at least two of the following activities are "very important " for a holiday in Norway:

- Engage in sporting activities (running, climbing, kiting, paragliding and soon)
- Go hiking/mountain hikes for more than two hours
- Cycling in nature (for example, in the terrain or in the woods)
- Cycling in the city or on roads
- Saltwater fishing
- Peak walking
- Freshwater fishing
- Kayaking/canoeing, rafting



Nature tourists

... that at least two of the following activities are "very important " for a holiday in Norway:

- Experience nature
- Experience the Northern Lights
- Experience the mountains
- Experience the fjords
- Visit national parks
- Experience the midnight sun
- Experience wildlife

Groups of foreign tourists

What is culture?

Some associate culture with museums, historical sites, theatres and concerts, while others think about local culture and way of life, eating local food and getting in

touch with locals. To understand those visiting Norway, the foreign visitors are divided into different groups, based on what they do during the holidays.

The foreign tourists can be grouped into five groups. One group is not interested in cultural activities at all. They represent a share of 29 percent. The rest take advantage of the various cultural facilities available in Norway.



Dronningruta
Christian Roth Christensen
Visitnorway.com



KODE Art Museums
Martin Håndlykken
Visitnorway.com



Concert audience
Bergen Reiselivslag/Eivind Senneset
VisitBergen.com

Non-users

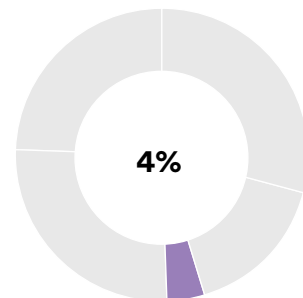
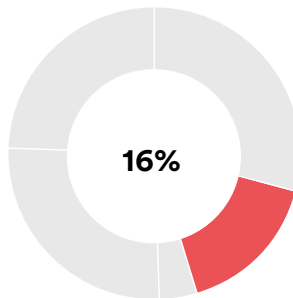
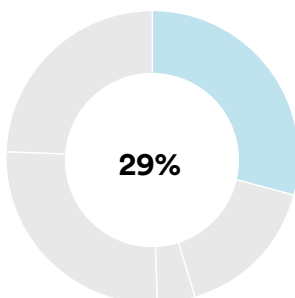
"Non-users" prioritise cultural activities on a very limited scale. There are other types of activities and experiences that are more important for this group on their holiday travel in Norway.

Cultural heritage and history

"Cultural heritage and history" are those who want to immerse themselves in the history and culture of the place they visit. They will visit historic buildings and sites, museums and go sightseeing.

Art and Stage

"Art and Stage" are those tourists who state that cultural experiences such as theatre, opera and concerts, modern art and museums are very important to their trip in Norway. Often in combination with culinary experiences and shopping.

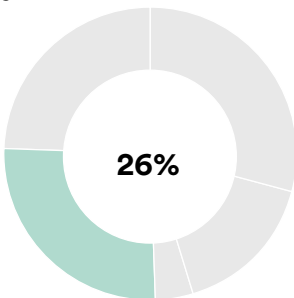




Vippa
Tord Baklund
Visitnorway.com

Lifestyle & Way of Life

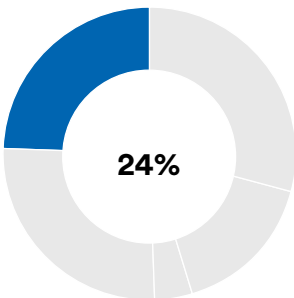
"Lifestyle and way of life" are the culturally interested tourists who are interested in getting to know the local population and local culture. They want to experience the city and the life of the locals, national celebrations and festivals, local history and lifestyle, not to mention culinary experiences and fine dining.



Guests at Hoelstuen
Benjamin A. Ward
Visitnorway.com

Major users

"Major users" are the tourists who consider that a wide range of cultural activities is important to their holiday in Norway. These are tourists who are looking for a variety of cultural experiences such as visiting historical sites and museums, experiencing local culture, culinary experiences etc.



Activities and daily expenditure for foreign holidaymakers

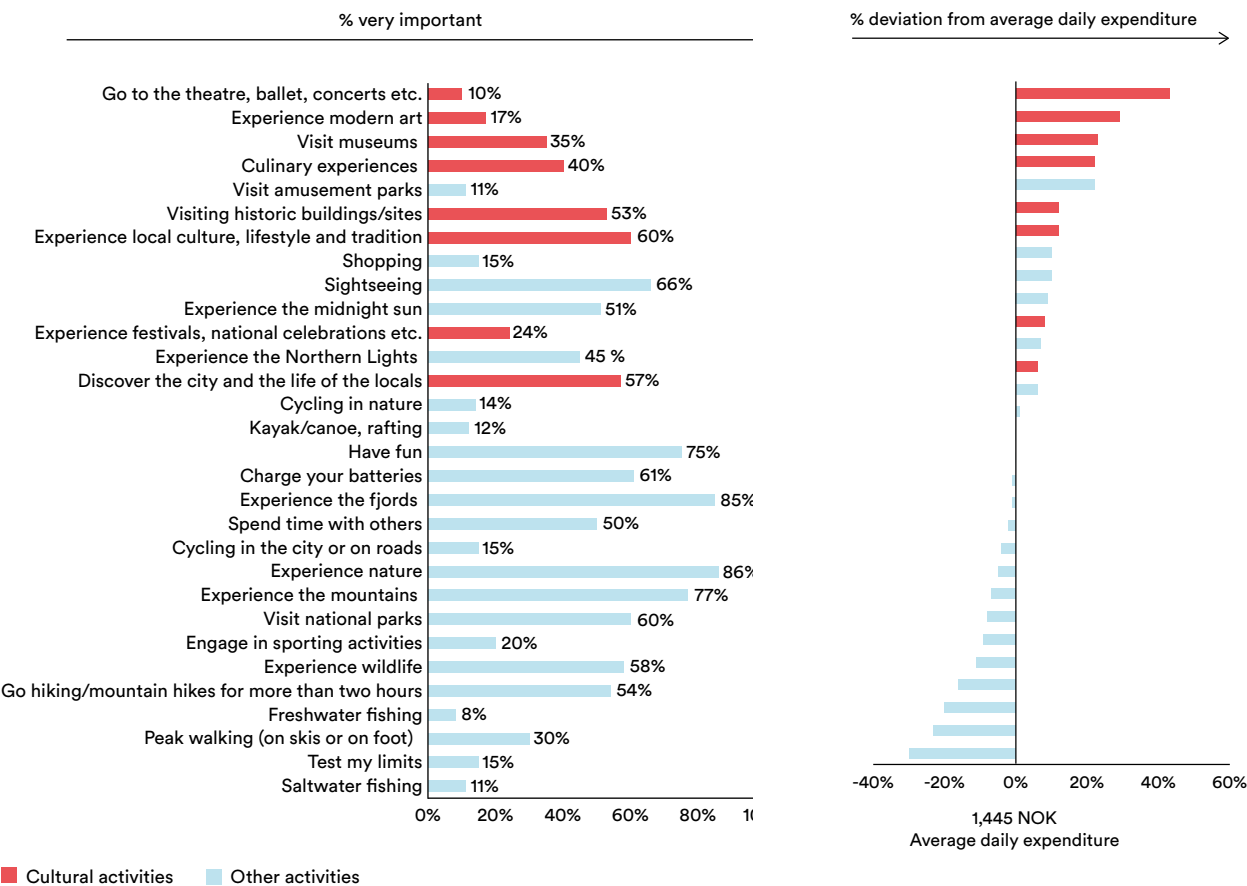
Foreign holidaymakers who are culturally active have a higher daily expenditure.

The foreign holidaymakers who state that the cultural activities (in red) are "very important", generally have a higher daily expenditure than the other foreign holidaymakers. This applies especially to those who attend theatre, ballet, concerts and/or opera performances, where the daily expenditure lies more than 40 percent above average. Sightseeing and experiencing local culture, lifestyle

and tradition are the cultural activities that most people state as being "very important", where the daily expenditure lies between 10–12 percent above average.

The cultural activity that yields the greatest overall economic significance (share of "very important" * expenditure) is culinary experiences.

Daily expenditure by activity. Based on the foreign holidaymakers who have stated that the activity is "very important" for their Norwegian holiday, summer 2018



Economic importance is calculated as follows:
percentage that has stated the activity as "very important"
*percentage of higher consumption.

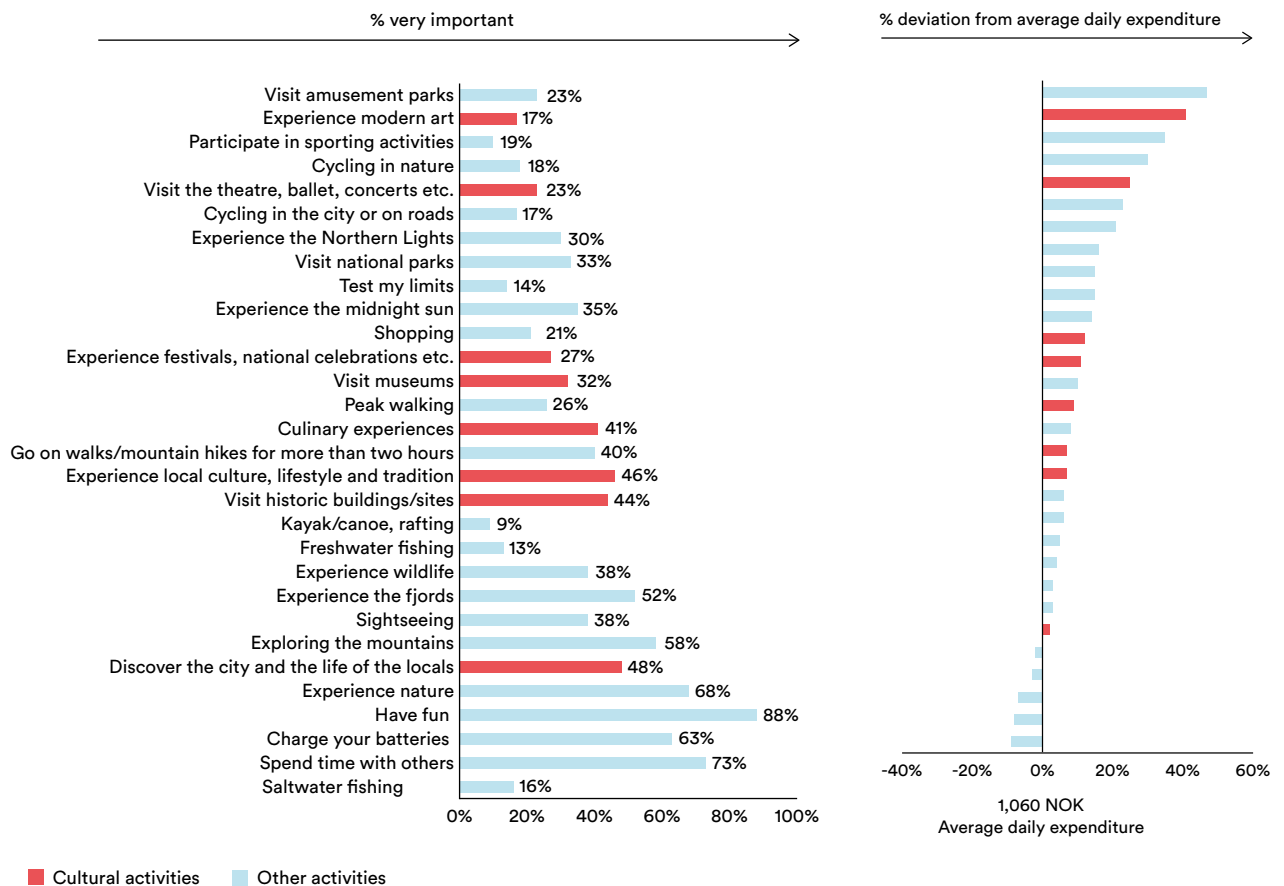
Activities and daily expenditure for Norwegian holidaymakers

In general, Norwegian holiday makers to a lesser extent state cultural activities as being "very important". Among the Norwegians who are actually culturally active, it is not to the same extent related to a higher daily expenditure, as is the case for foreign holidaymakers. However, there are some cultural activities that have a noticeably higher daily expenditure, also among Norwegians. For example, to experience modern art and attend theatre, ballet, concert and/ or opera performances.

The Norwegian holidaymakers who think culture is important, seem to have the cultural activity as a their purpose for the trip, and not as part of many other activities such as the foreign holidaymakers have.

For more information on the use of culture and nature by region, the full report can be found at visitnorway.no/innsikt

Daily expenditure by activity. Based on the Norwegian holidaymakers who have stated that the activity is "very important" for their Norwegian holiday, summer 2018



Economic importance is calculated as follows:
percentage that has stated the activity as "very important"
*percentage of higher expenditure

Differences between markets

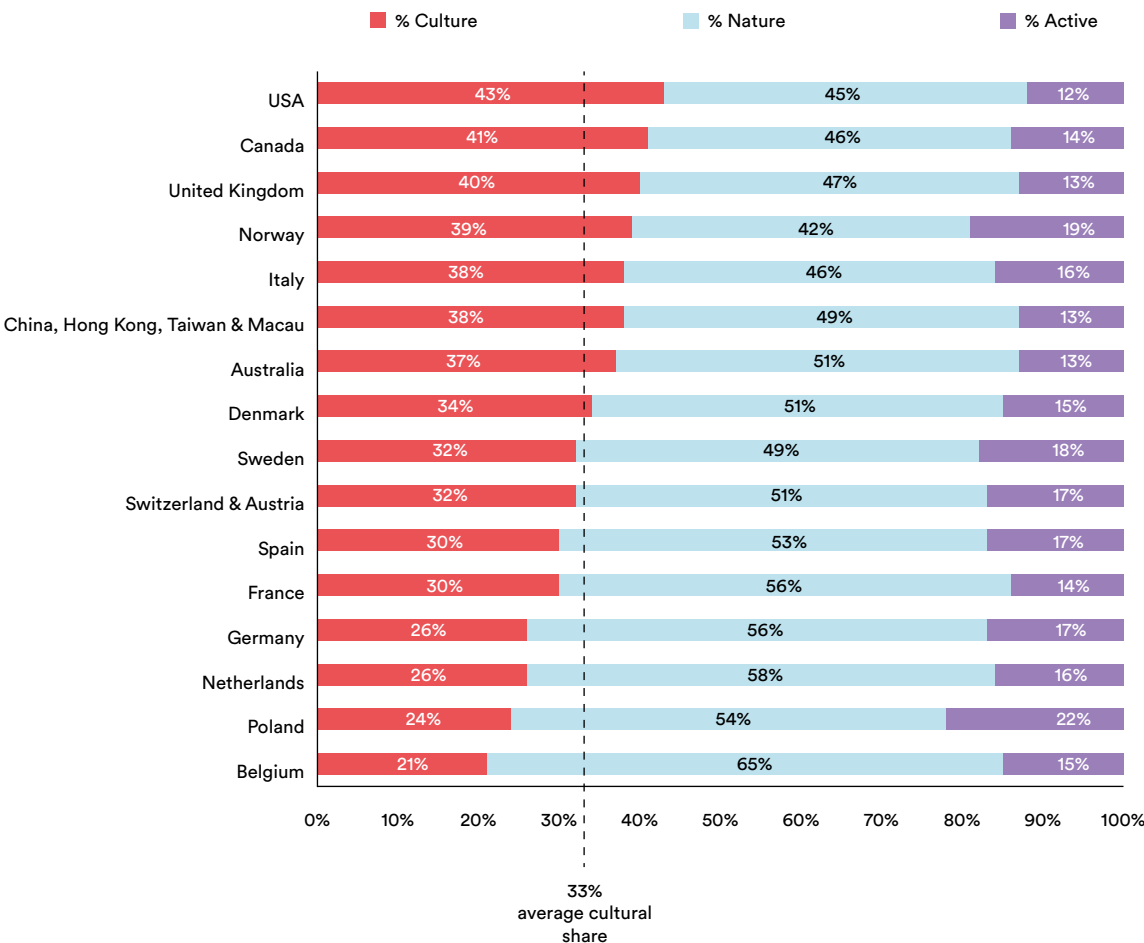
Distant markets are somewhat more concerned with culture, while the home market is more concerned with nature.

Tourists from the US and Canada are most interested in cultural activities, while the home market such as Belgium and Poland is considerably less interested. It is perhaps logical since the culture of the distant markets is often more unlike the Norwegian, and when they have travelled so far

they are interested to take part in all that Norway has to offer. There are also many cultural fans from the markets where many first-time visitors come from.

Regardless of this, it is the combination of culture and nature that is the motivation for the vast majority of foreign tourists. The smallest group is those who are only interested in an active holiday.

The importance of different types of activities distributed by foreign tourists



Satisfaction with Norwegian holiday

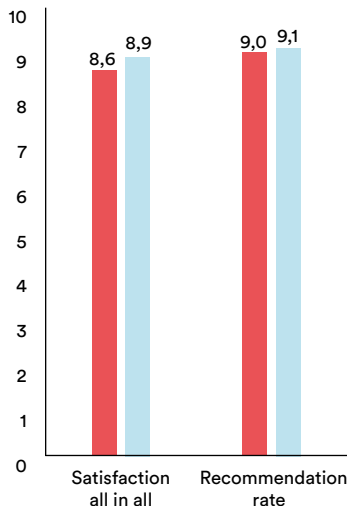
Satisfaction and recommendation willingness for Norwegian and foreign holidaymakers.

Those who spend their holidays here, are more than moderately satisfied with most things. The interesting thing is that both Norwegian and foreign holiday makers are unified in their feedback. Even though the foreigners

are slightly more satisfied with the holiday and would to a somewhat greater extent recommend a holiday in Norway to others. Unfortunately, it is once again, the ratio between price and quality that scores lowest, and the foreign tourists are slightly less happy with the shopping opportunities than the Norwegians.

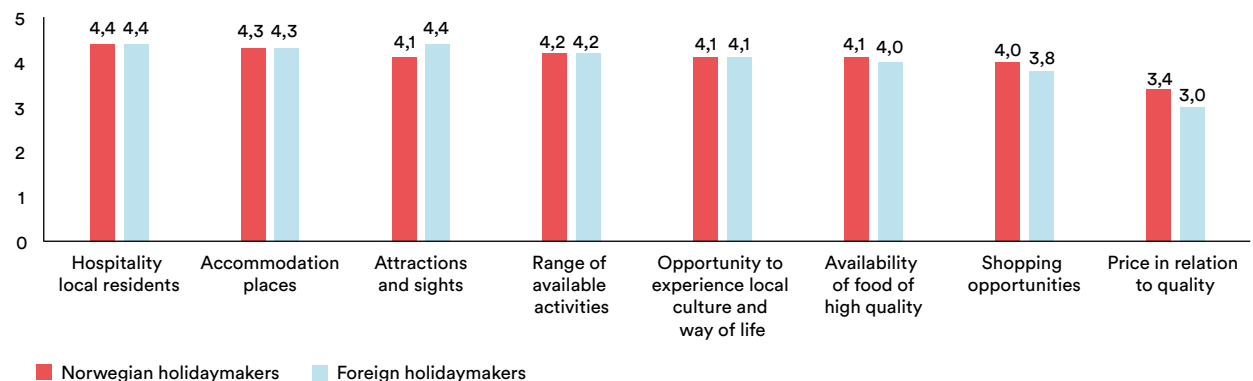
Satisfaction and recommendation

Scale from 0 to 10, where 10 is positive.



Satisfaction with parts of the holiday

Scale from 1 to 5, where 5 is positive.



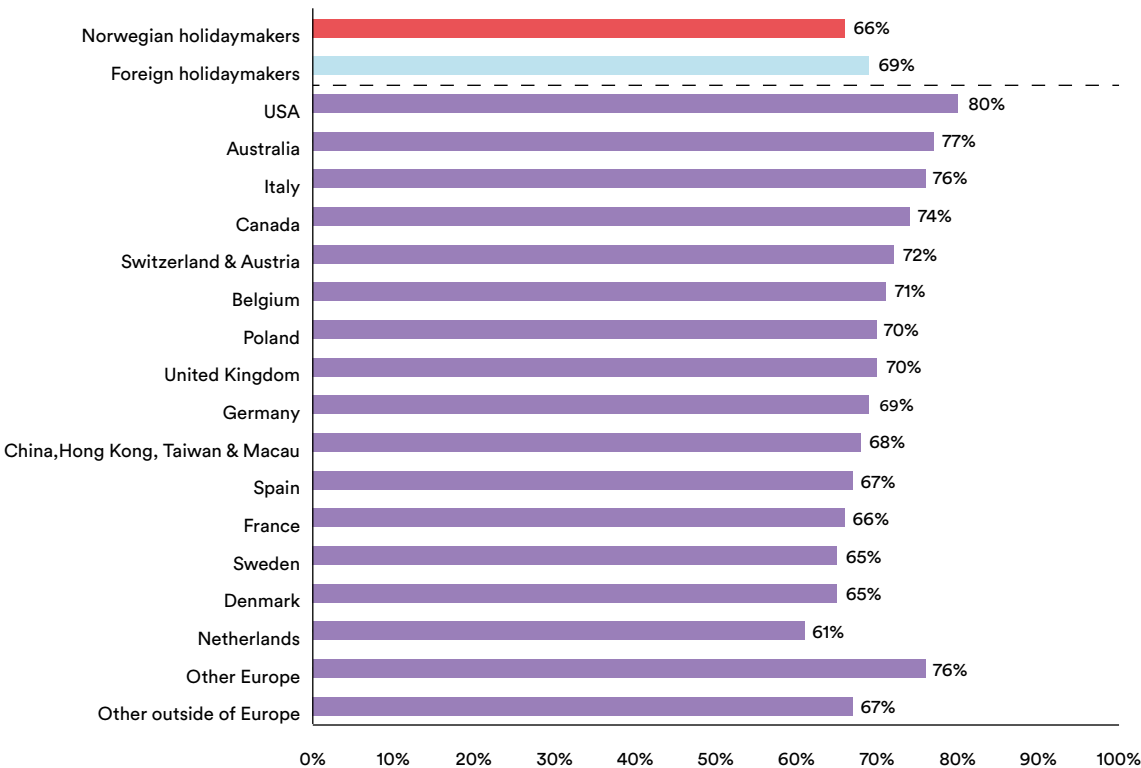
Americans are our foremost ambassadors

NPS stands for Net Promoter Score which is calculated from the visitors' recommendation willingness on a scale from 0–10.

90 percent of our visitors respond between seven and ten to the question of whether they would recommend a holiday in

Norway to others. Overall, the result is good, but the answers vary between markets. Americans, Australians and Italians are our foremost ambassadors, who will most strongly recommend others to travel to Norway. Those who give the fewest recommendations are the Dutch, Danes and Swedes, who contribute to lowering the average.

NPS across holiday markets



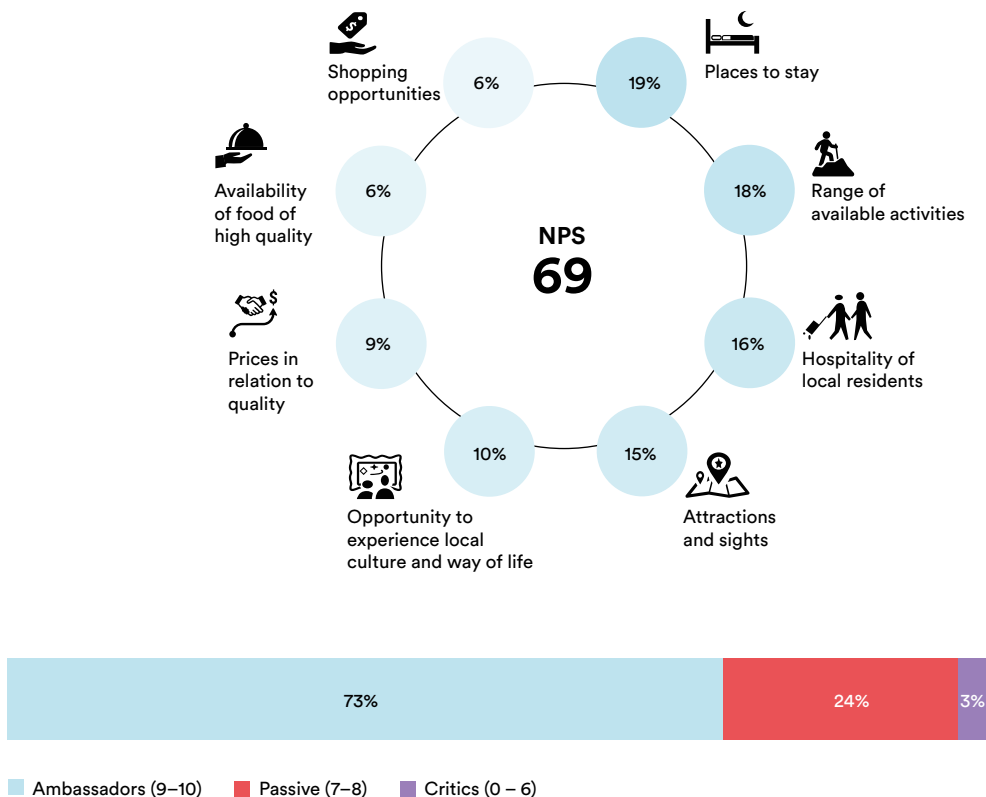
What does it take for those who visit us to recommend a Norwegian holiday to others?

One thing is how the tourists consider the various parts of the holiday, something else is whether they will recommend others to travel here. Analyses among the foreign holidaymakers show that accommodation has the greatest significance for the overall experience, closely

followed by activity opportunities and whether they think the locals are hospitable. Tourists are not satisfied with price in relation to quality, and this ratio explains nine percent of the overall satisfaction.

What conditions drive the willingness of foreign holidaymakers to recommend Norway?

On a scale of 0 to 10, where 0 is very unlikely and 10 is very likely, to what extent would you recommend Norway as a tourist destination to others?

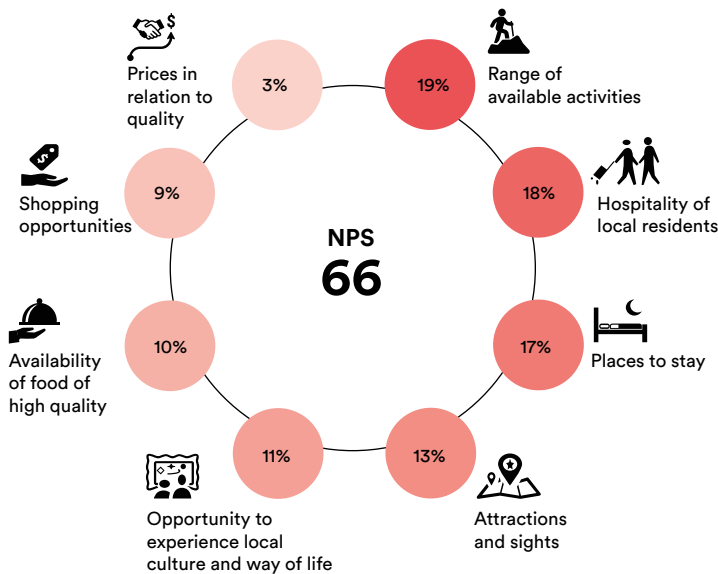


Those who spend their holidays here emphasize the same, irrespective of whether they are foreign or Norwegians who spend their holidays in their own country. It is activity opportunities, meeting with people and accommodation that are most important for Norwegians.

The interesting thing is that price in relation to quality, only affects the overall experience to a limited extent (3%). Although not even Norwegians think that price was consistent with the quality they experienced.

What are the factors that drive the willingness of Norwegian holidaymakers to recommend Norway?

On a scale of 0 to 10, where 0 is very unlikely and 10 is very likely, to what extent would you recommend Norway as a tourist destination to others?



Ambassadors (9-10) Passive (7-8) Critics (0-6)

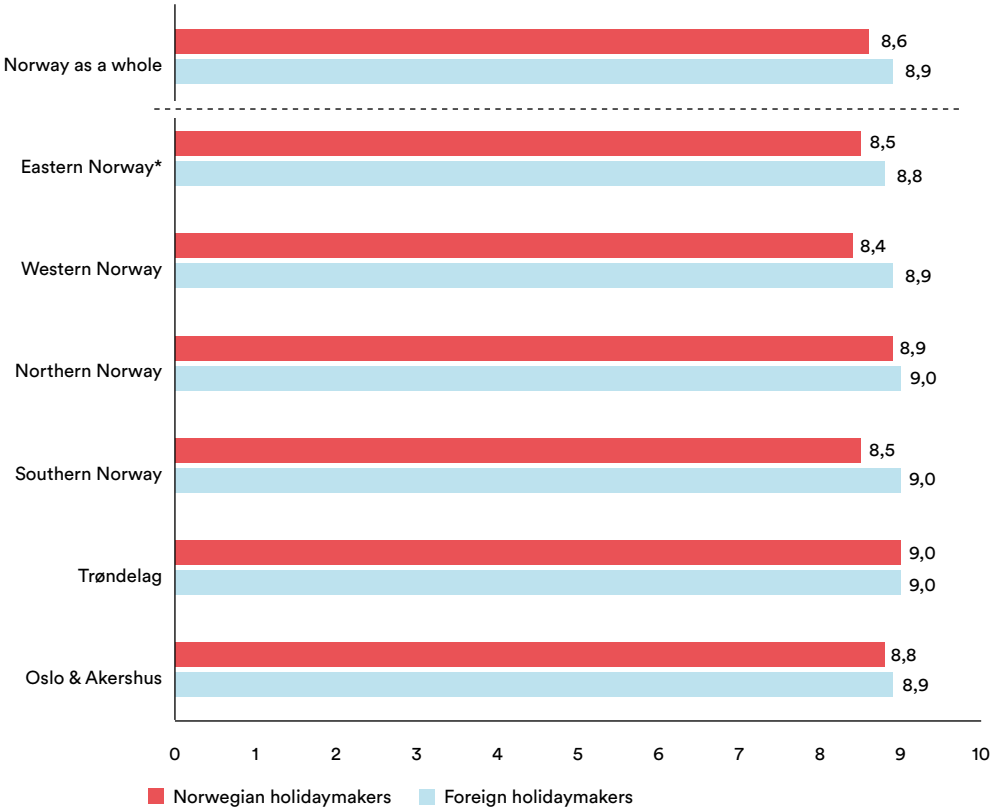
Tourists are most satisfied with holidays in Northern Norway and Trøndelag

The foreign tourists are above average satisfied with their stay in Northern Norway, Trøndelag and Southern Norway. The Norwegian holidaymakers agree with the assessment of Northern Norway and Trøndelag, but are also very satisfied with Oslo and Akershus.

For more information on satisfaction by region, the full report can be found at visitnorway.no/innsikt

Satisfaction distributed by region

Average on a scale from 1–10, where 10 is positive.



*Eastern Norway, excluding Oslo & Akershus
Source The Tourism Survey, Innovation Norway

Mode of transport to Norway

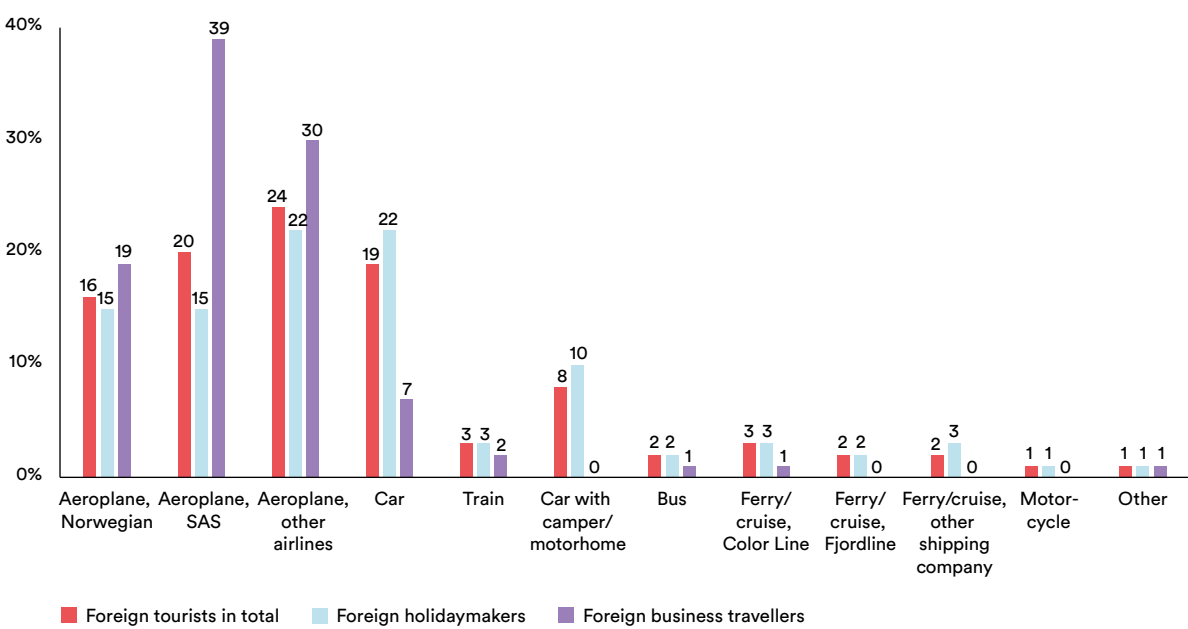
60 percent of everyone coming to Norway arrived by aeroplane

Of business travellers the proportion accounts for as much as 88 percent, and SAS is the airline of preference. Of those who come to Norway on holiday, the proportion is 52 percent.

A large proportion also comes by car. It is especially visitors from the home market such as the Netherlands, Sweden, Germany and Denmark who mainly come in their own car and/or by ferry.

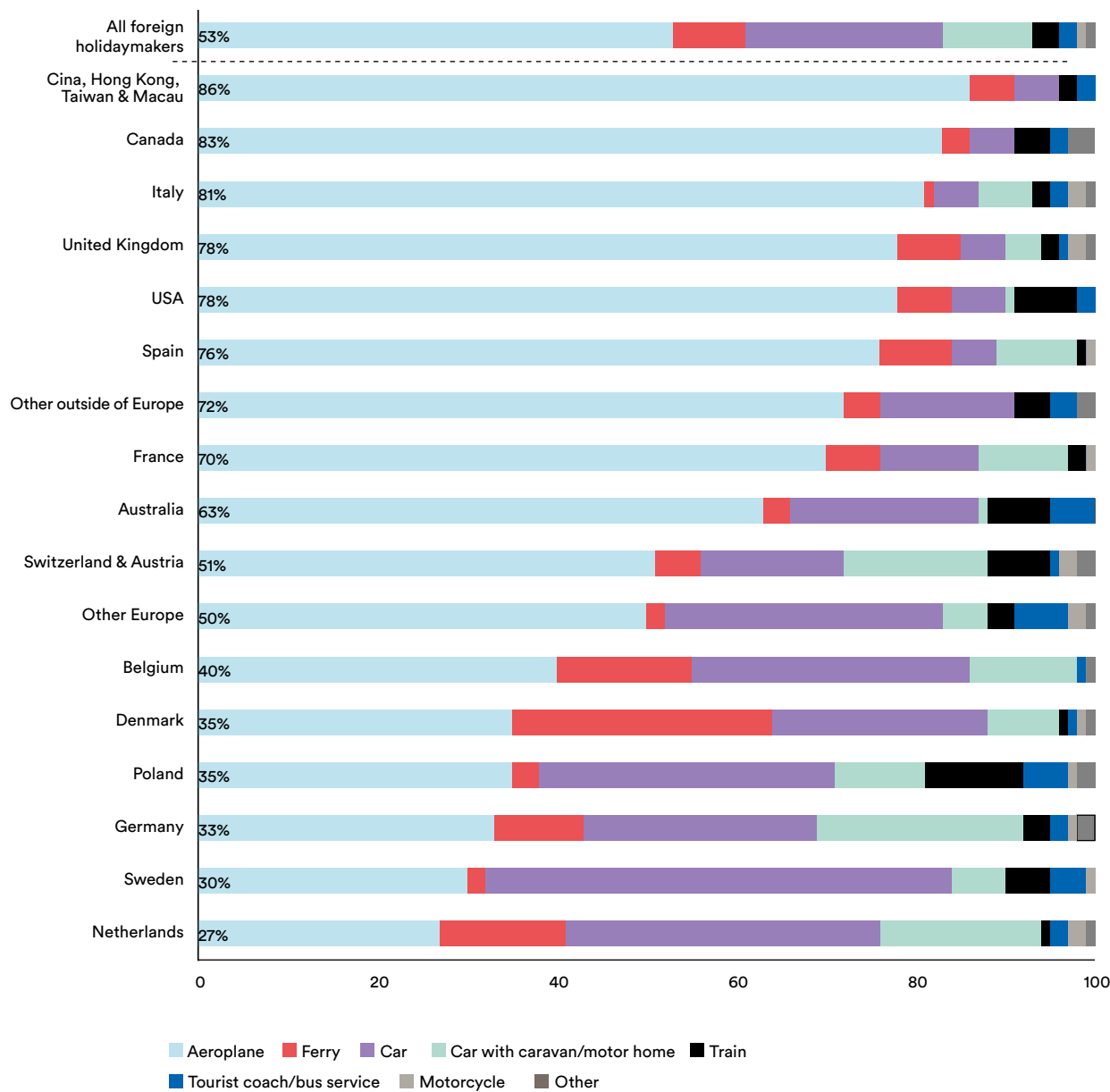
Mode of transport to Norway

Figure in percentage



Half of all holidaymakers come to Norway by air

Mode of transport to Norway per market





Experience of mass tourism in Norway

– Norwegians' and visitors' perspectives

FOR THE FIRST TIME, a nationwide survey has been conducted to feel the pulse of Norwegian's attitudes towards tourism. It is also the first time tourists have been asked about the topic.

After the two last summers' many debates about over tourism, Innovation Norway wanted to take the issue seriously. Therefore, a nationwide study was conducted for the first time in October 2018 to measure Norwegians' attitude towards tourism. There is no doubt that tourism provides increased prosperity, economic growth and employment, but lack of toilet facilities, littering and queues have characterized the media image.

The tourism industry in Norway is largely seasonal, with more than half of all overnight stays limited to the summer months. It is also during this period that there has been the greatest growth of tourists in recent years. The growth in the summer season is not evenly distributed throughout the country, but is mainly concentrated in specific limited areas. Therefore, it was important to measure Norwegians' attitude towards tourism in general, and defined pressure areas in particular.

The population survey is intended to measure Norwegians' attitudes towards tourism, for better or for worse. Both attitudes towards today's tourism, and the desired development.

The objective is to achieve sustainable development, but what is meant by sustainable development?

Sustainable development of the tourism industry assumes that both social, environmental and economic aspects are taken into account. Therefore, it is important to measure Norwegians' attitudes to tourism.

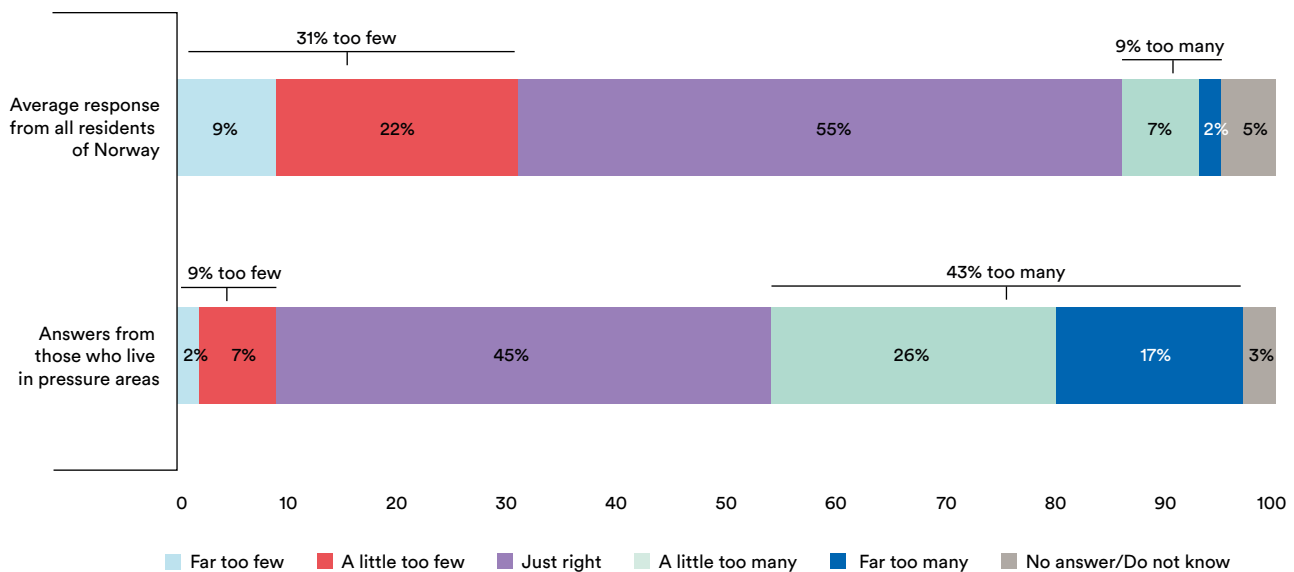
The sustainability term is threefold



Those who responded that there are "too many" tourists received a follow-up question. Here, the majority responded that there are not too many tourists all the time, but from time to time.

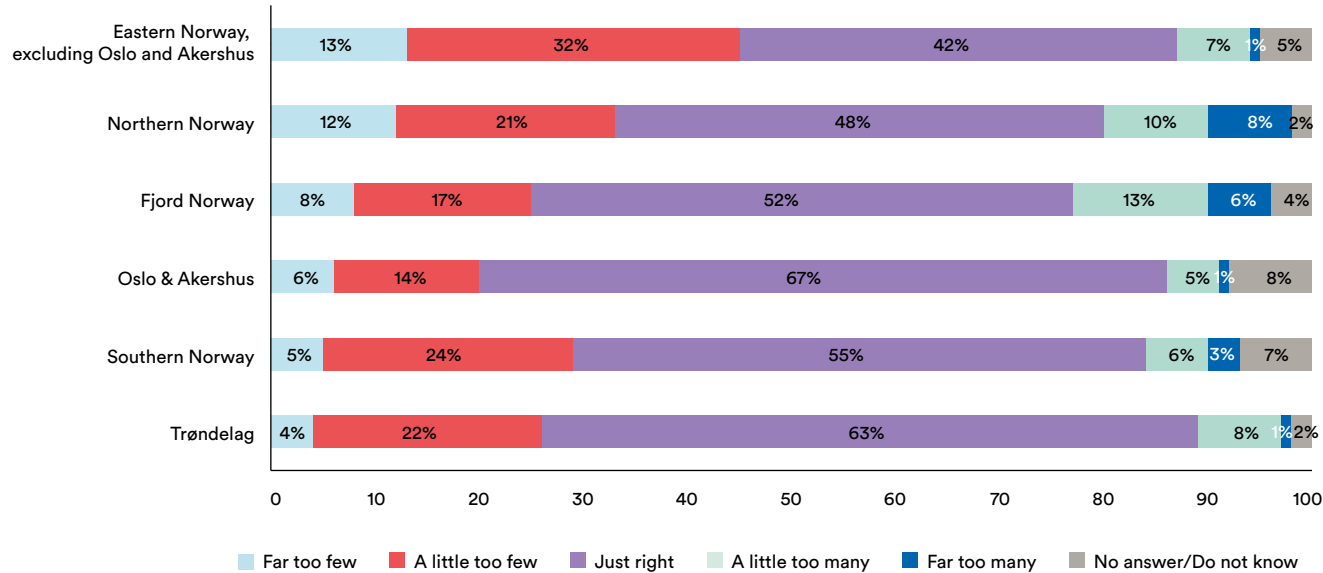
How do you view the number of tourists today..?

... where you live





Distributed by regions, it is perhaps not surprising that it is inhabitants of Fjord Norway and Northern Norway who mostly think there are too many tourists.



Norwegians are generally positive to tourism

Tourism creates pride

We are proud that foreign tourists choose Norway as their destination. We agree that tourists who visit us receive world-class products and experiences and we want those who visit us to have a good experience.

Results for the entire country show that Norwegians generally see that tourism creates jobs, increases the possibility of start-ups and contributes to the growth and

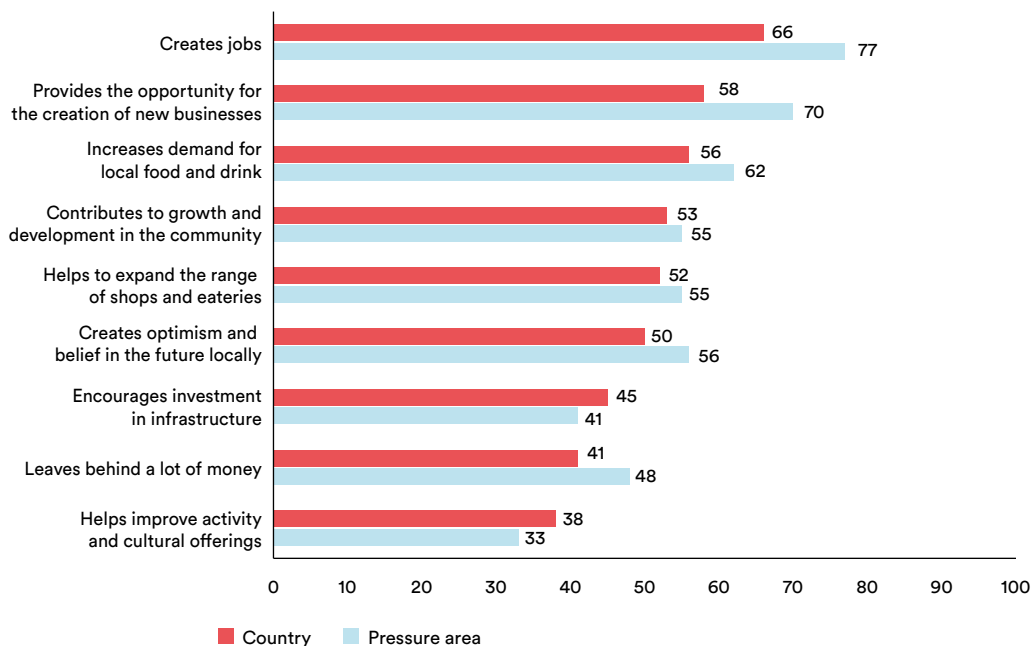
development of local communities. Simply contribute to optimism and belief in the future locally.

Norwegians think that tourism attracts more positive, than negative aspects. People in areas with a lot of tourism are more than the rest of the population, aware of the positive significance of tourism. At the same time as they are aware of the other side of the coin.

People in areas with a lot of tourism are aware of the positive significance of tourism, but there is agreement that tourism does not contribute to the improvement of infrastructure (roads, hiking trails, signage) or better activity and cultural offerings locally.

How much do you agree or disagree with the following statements about the benefits of tourism where you live?

Share Wholly/Partially agree.



Negative aspects of tourism

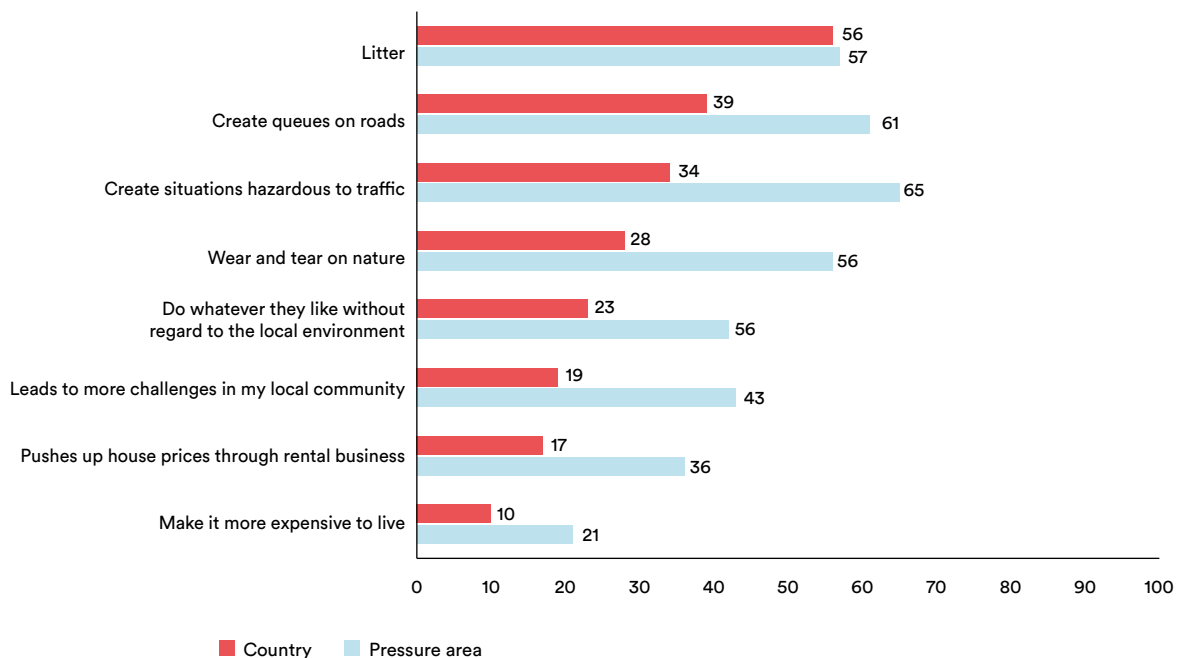
The fact that tourism is associated with littering is considered to be the same inside and outside the pressure areas. Otherwise in particular residents in pressure areas emphasize the problems with traffic, wear and tear on nature, and four out of ten believe that tourists do whatever they like.

There are shared opinions as to whether tourism is sustainable. Many believe tourists leave behind too little money, and that we can be better at earning money from those who come.

“Everyone” agrees that tourists are litter louts, although the country is much more divided in relation to the negative impact of tourism than the positive.

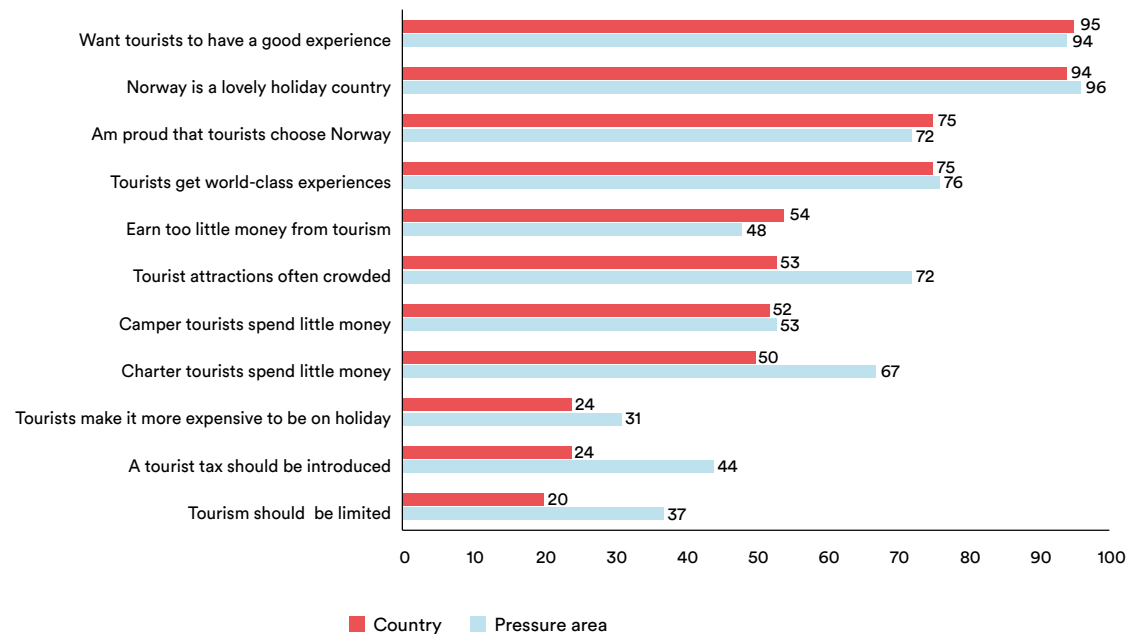
How much do you agree or disagree with the following statements about the challenges of tourism where you live?

Share Wholly/Partially agree.



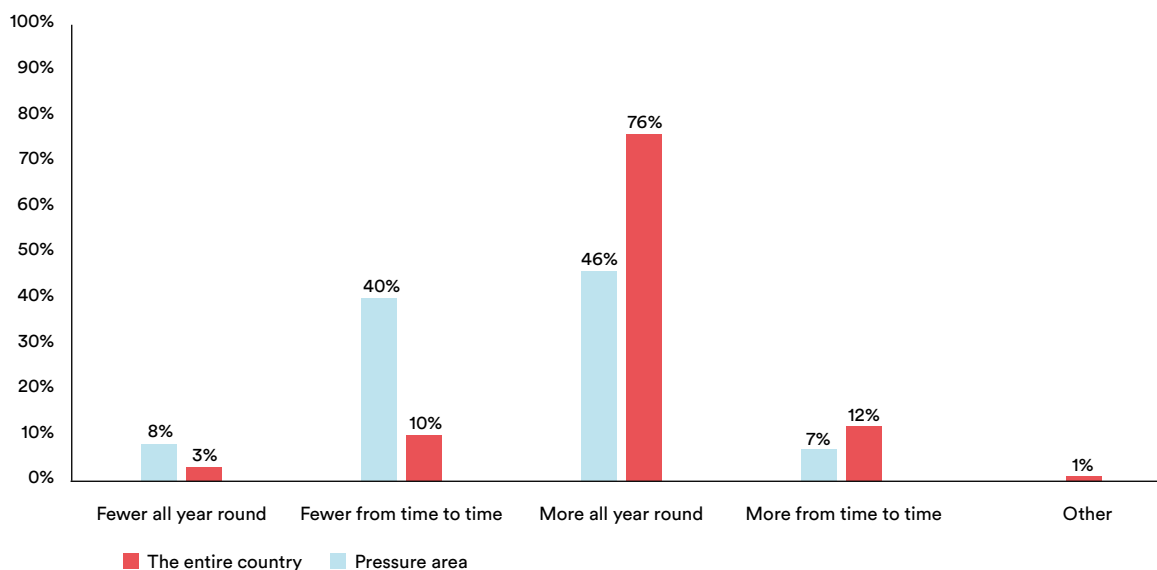
To what extent do you agree or disagree with the following statements?

Share Wholly/Partially agree.



Norwegians' view of future tourism: do we want the same to slightly increasing volume. Wishes for the future reflect current experiences

Among the most negative, according to current experiences, three out of ten want the number of tourists to be reduced, while half want stabilization at the current level. Among the most positive, eight out of ten say they want more tourists – three out of ten say "much more." That is to say, the desire for reduction is largely limited to the most negative.



How do visitors experience the situation?

IPK International is conducting a worldwide survey, which shows that 28 percent of all travellers in 2018 were bothered by mass tourism. And as much as 12 percent responded that the volume of tourists ruined the experience of the destination.

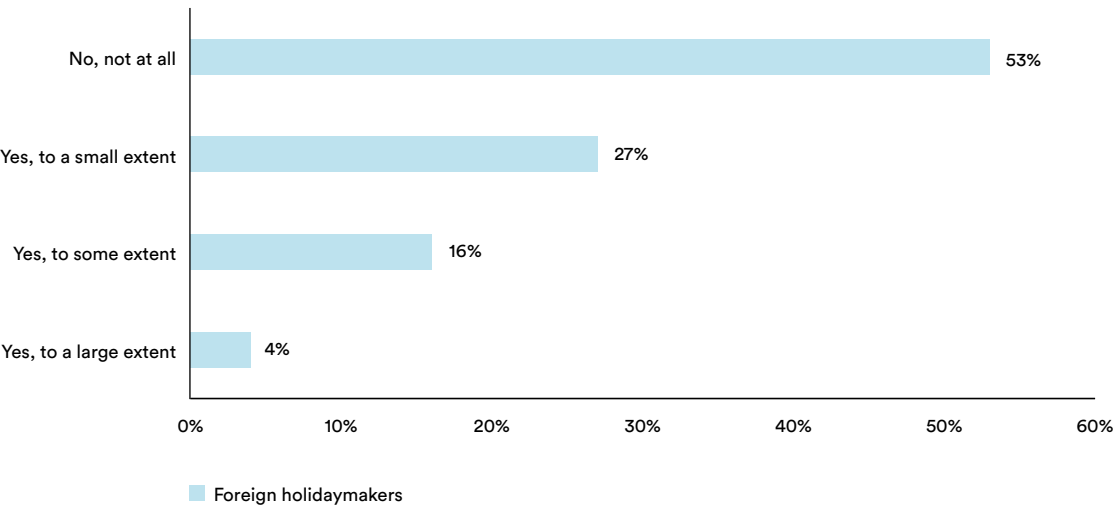
In Norway we asked tourists the same, and 47 percent of the foreign tourists responded that they had experienced

mass tourism to a varying extent. Only four percent responded "yes, to a great extent," while 43 percent responded that they had experienced something of this. What is interesting is that there is a direct correlation between this and satisfaction with the Norwegian holiday. Satisfaction with the stay is reduced proportionate to the degree of the experience of mass tourism.

47 percent of foreign tourists experienced a somewhat small or greater degree of mass tourism during their stay.

"The places I visited felt crowded because there were too many tourists there"

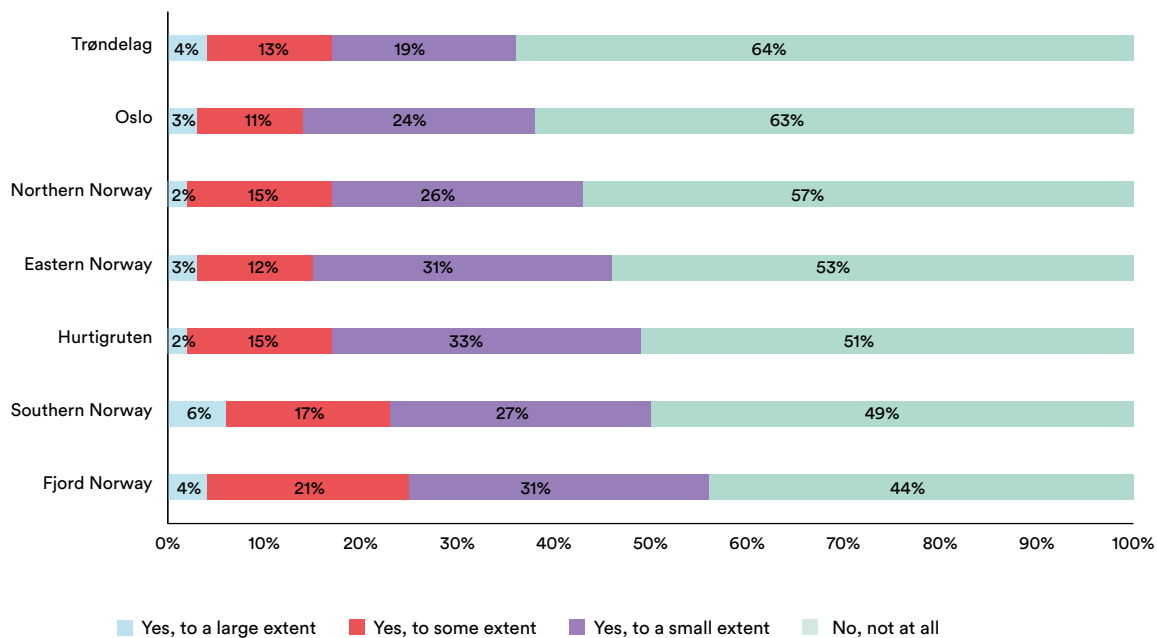
Holidaymaker summer 2018





"The places I visited felt crowded because there were too many tourists there"

Responses from foreign holidaymakers summer 2018

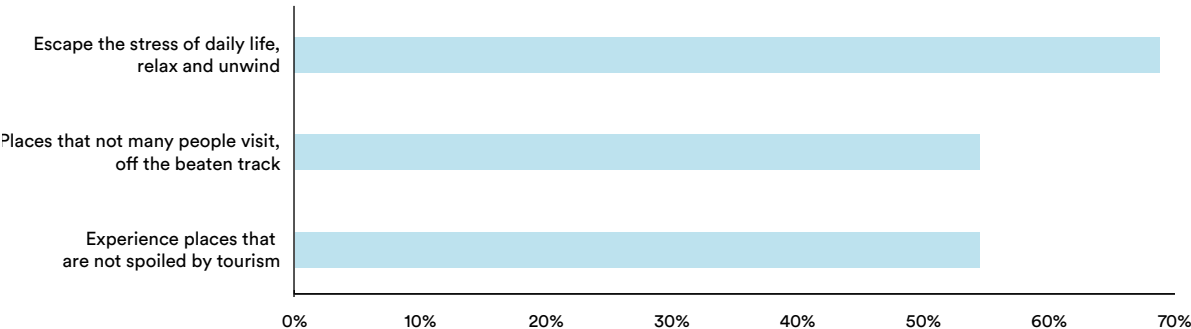


When foreign tourists are asked about their main reason for travelling here, more than half responded that they chose a holiday in Norway to get away from the stress of everyday life and unwind. Many also respond that they wanted to experience a place that does not have many visitors and

that is not spoiled by tourists. When they then experience that there are many other tourists here, the experience can be something different from what they had expected. It also has a negative impact on satisfaction with the visit.

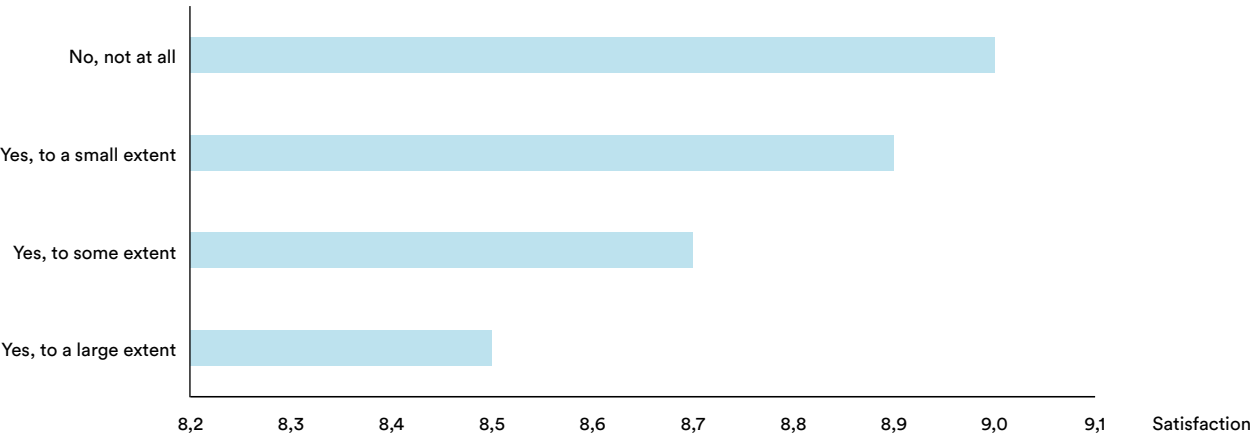
Expectations govern the experience

Many people associate Norway with a beautiful but deserted destination



There is correlation between experience of "mass tourism" and satisfaction with the holiday

Satisfaction with a Norwegian holiday declines when the tourist finds that it has been full





Norwegians' holiday habits at home and in foreign countries

FEWER HOLIDAYS ABROAD and more trips in their own country led to a reduction in spending.

In 2018, Norwegians went on a total of 22.2 million domestic and international holiday trips. That is an increase of 21 percent, which means 3.9 million more trips, compared to 2017. The number of holiday trips in their own country increased by 38 percent, which is less than 4.3 million more trips. The number of foreign holidays fell by six percent, which means a decline of 440,000.

The increase was in the number of short holidays

While it was especially the number of longer holiday trips abroad that fell, the number of shorter trips in their own country increased.

Shorter trips, are trips with a duration of up to three days, and it appears from the figures from Statistics Norway that the increase of holidays in Norway is due to a good increase in short holiday trips of 2,3 days. 2018 was a year characterized by a winter season with good snow conditions, and the summer was both long and warm in much of the country. This led to us taking shorter trips to get away/using weekends to go away.

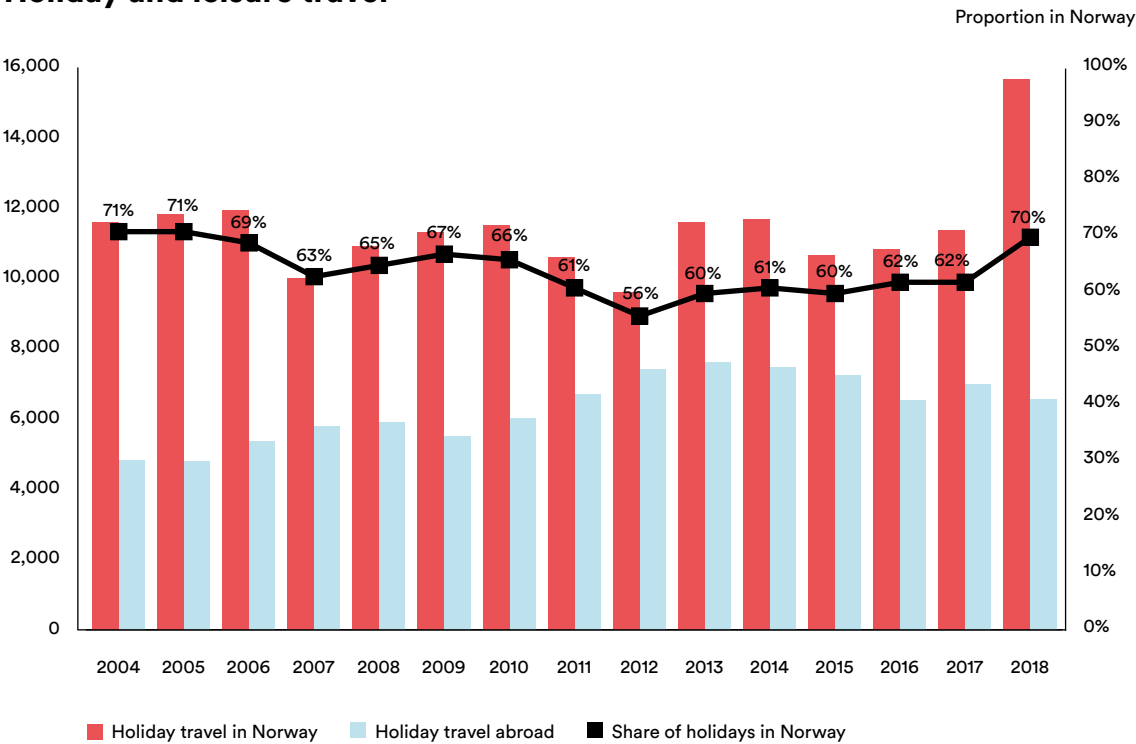
70 percent of all holiday trips were in Norway, but only 33 percent of the holiday budget was spent here. The rest was used on foreign holidays.

Two out of three holidays are domestic

15.66 million holidays in Norway means that 70 percent of all holidays were spent in their own country. Norwegians have always spent most of their holidays in Norway, and this is not a particularly Norwegian phenomenon. In general, all EU citizens have the same travel pattern

as Norwegians in respect of the distribution between domestic and international travel. Approximately two of three trips made by EU citizens are in their own homeland, as shown by figures from the European Statistical Office (Eurostat).

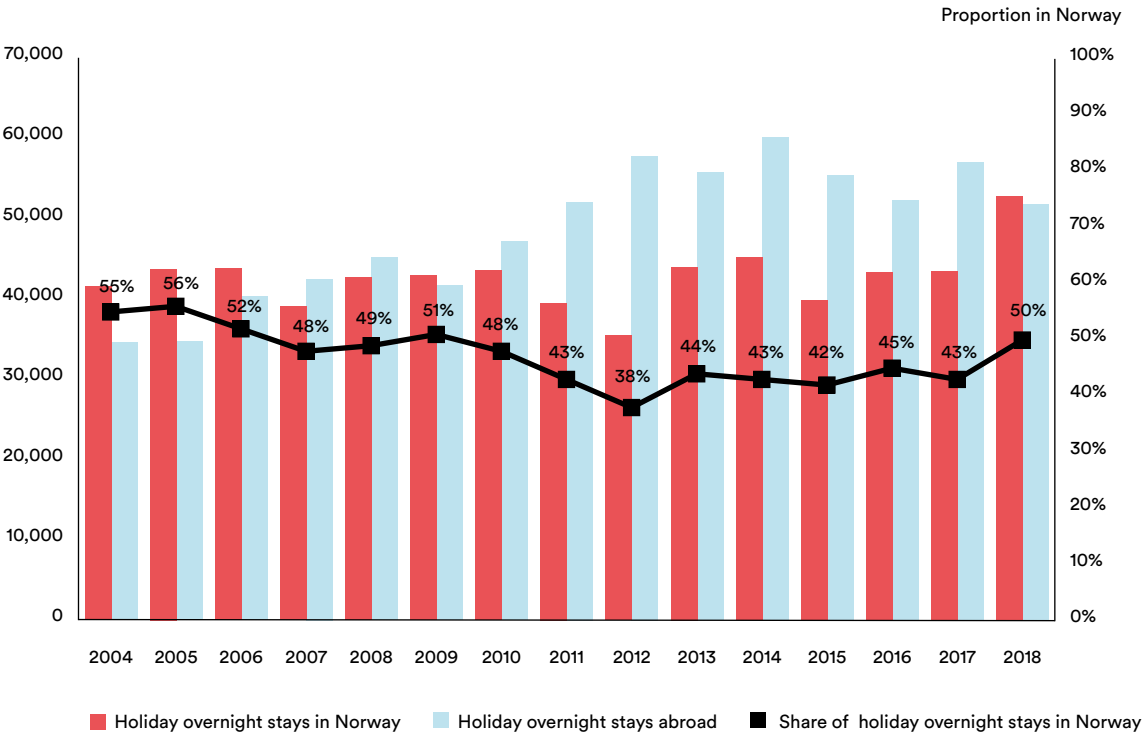
Holiday and leisure travel



Typical with short holiday trips

In contrast to foreign holidays, which last over several days, the typical Norwegian holiday is of a shorter duration, such as weekend getaways. Only 30 percent of all vacations here at home last four days or more.

Holiday and leisure overnight stays

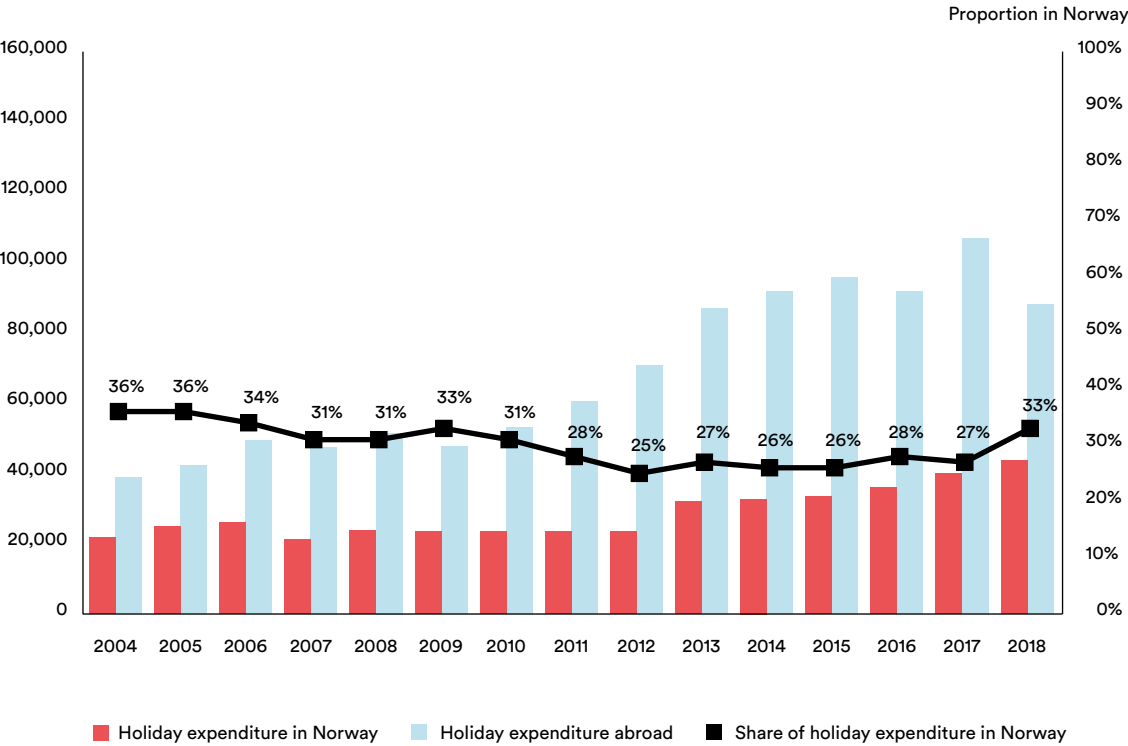


Spend more money overseas

Norwegians spent slightly less than NOK 132 billion on holiday travel in 2018. This is a decrease of ten percent, or NOK 15 billion, compared with 2017. The reason is that we travelled on fewer foreign trips. Norwegians spent

88 billions on holiday travel abroad, which is a decrease of 17 percent. Despite the fact that we spent most holidays in our own country, expenditure was NOK 43.6 billion, which is less than half of what we spent abroad.

Holiday and leisure expenditure



Cruise

CRUISE is only a small proportion of total holiday traffic.

With 27.2million passengers, 2018 was yet another year with growth in international tourism. This was a growth of five percent, corresponding to 1.4 million more cruise passengers that year.

One can perhaps get the impression that cruise as a holiday form is greater than what it really is. More and more people choose a cruise, but figures from IPK International show that cruise as a holiday form only represents a share of three percent of global tourism in 2018.

More come to Norway on a cruise holiday

There are also more who choose to come to Norway on a cruise. In 2018, 852 241 cruise passengers came to the Norwegian ports. That is a growth of 14 percent from 2017 and represents 102 827 more passengers. Cruise ship often visit several ports, so you will count the same guest at all the ports the ship visited during its stay in Norway, there was a total of 3 436 376 day visitors to Norwegian ports. It should be said that there are no statistics on whether these passengers actually went ashore in all the ports where they had the opportunity.

There are also the most Germans who come to Norway on a cruise

Germany is the largest market, measured in land-based tourism, and is also the largest market measured in the number of cruise passengers. In 2018, the main markets were Germany, the UK and the United States, which together represented a share of 68 percent of all cruise passengers.

Most visited ports in 2018

PORT	Number of passengers in 2018
Bergen	597,217
Geirangerfjorden Geiranger	356,707
Stavanger	333,000
Ålesund	306,647
Flåm	257,988
Romsdalsfjord (Molde, Åndalsnes & Eresfjord)	188,578
Oslo	187,698
Nordfjord Olden Loen	174,127
Trondheim Havn Trondheim	149,331
Nordkappregionen Havn IKS	142,757
Tromsø	141,945
Hardangerfjorden Eidfjord	133,636
Other ports	466,745
Total	3,436,376

Largest nationalities on cruises to Norway

COUNTRY	Number of passengers in 2018	Change from 2017
Germany	275,115	19%
United Kingdom	200,027	22%
USA	104,757	6%
Italy	39,898	6%
Spain	39,062	0%
France	20,215	-10%
Australia	19,111	25%
Canada	18,419	3%
Netherlands	18,023	-4%
Belgium	12,060	6%
Other nationalities	105,554	14%
Total	852,241	14%

International meetings

INNOVATION NORWAY has strengthened its efforts to attract more international congresses, and since 2011, statistics have been systematically extracted within this segment. For the past four years there has been a steady increase in the number of congresses in Norway.

Congresses are important for Norway for several reasons; the segment has high profitability, provides ripple effects for host cities way beyond the tourist seasons. This also contributes to building brand Norway and Norway's reputation internationally.

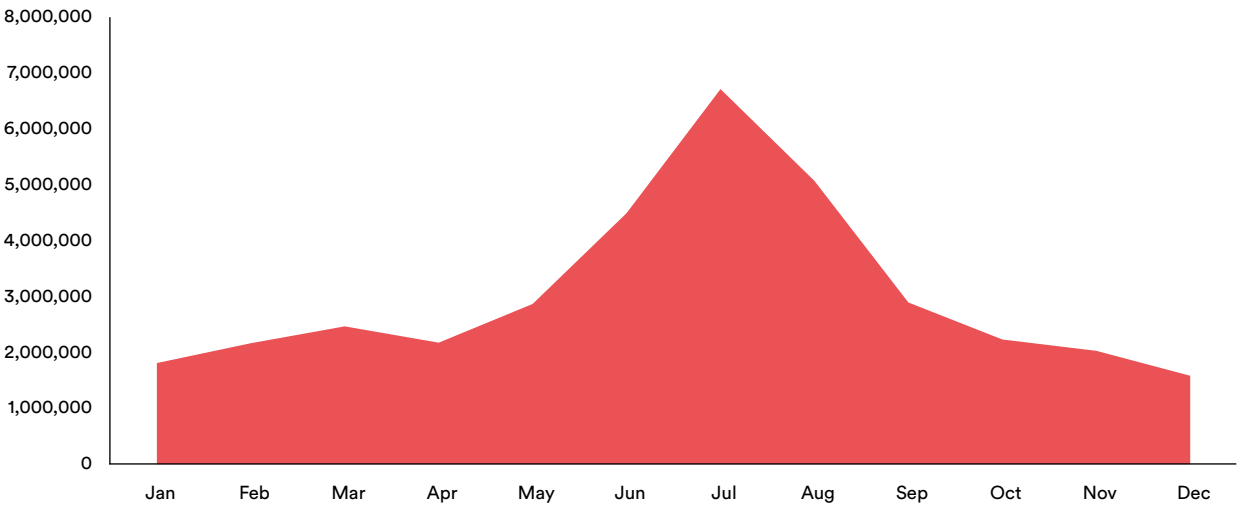
In 2018, 534 congresses were held in Norway, where the five congress cities in Norway, Oslo, Bergen, Stavanger, Trondheim and Tromsø, have the largest share of congresses held in Norway. This is quite natural as these cities, and especially Oslo have infrastructure with direct flights, and other transportation, as well as other facilities such as more hotels and congress centres than the smaller destinations. The congresses are also most often associated with academic environments, and their concentration is the largest in the cities with major universities and other educational and research environments.

There is still a large spread throughout Norway of congresses; both the location and the number of congresses outside these cities, including along the coast where there are many smaller academic environments. One example of this is the ISOCARP congress held in Bodø, with 525 international delegates.

The focus on congresses is in line with Innovation Norway's Tourism action plan «All of Norway all year round». According to Statistics Norway, there are the most overnight stays in Norway in July, as there are the most holiday and leisure tourists in Norway. The congresses are usually held outside of this period when the number of congresses and congressional delegates is minimal.

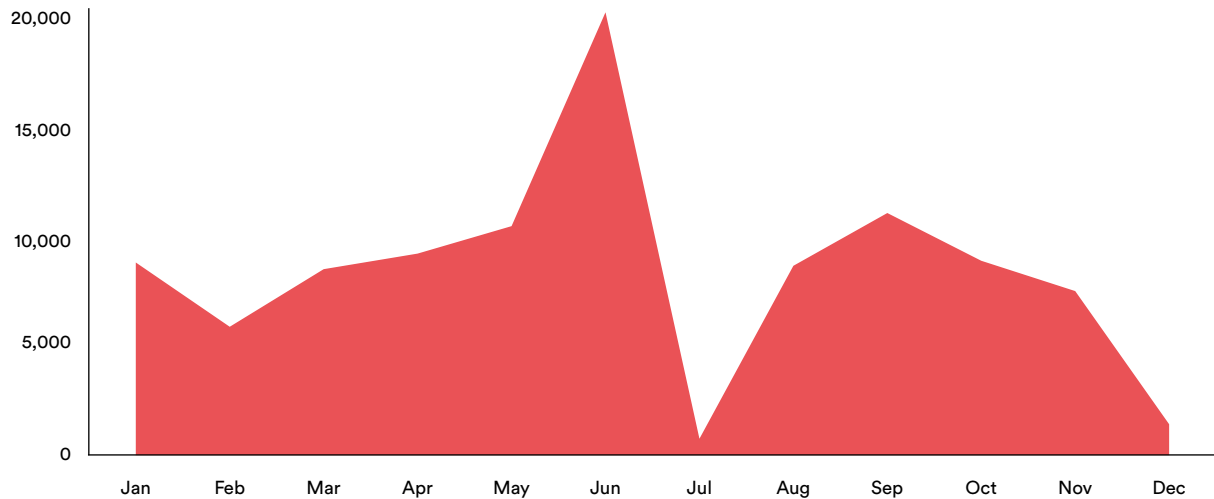
For the first time, Innovation Norway has surveyed the themes of the congresses held in Norway in 2018. The five largest categories reflect major research areas associated with universities and other research and teaching institutions, where there is a major focus on the development of new technologies and transfer of competence. Innovation Norway has, according to its strategy, identified six areas of opportunity, where investments have been made in recent years – four of these areas of opportunity are within the five largest sectors that arranged congresses in 2019.

Commercial overnight stays throughout the year



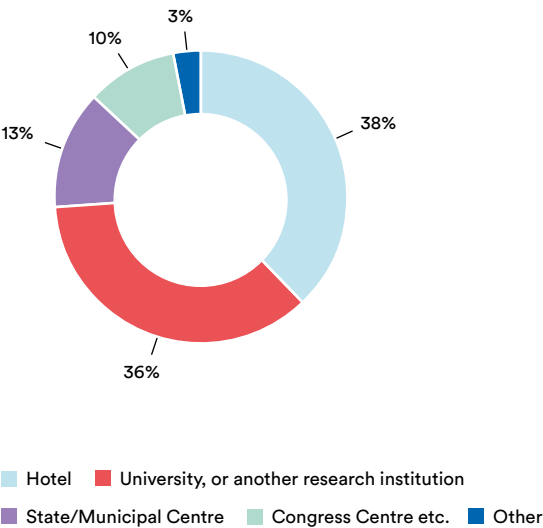
Source Statistics Norway

Congress participants throughout the year



Source Congress statistics collected by Innovation Norway

Congress locations



What is defined as an international congress?

Facts: International Association Conventions – Global.*

Rotation: Typically, a conference alternates annually or every other year in different countries and continents. The initiative to act as host often comes from a local academic environment or national association.

Duration: approx. 3-5 days.

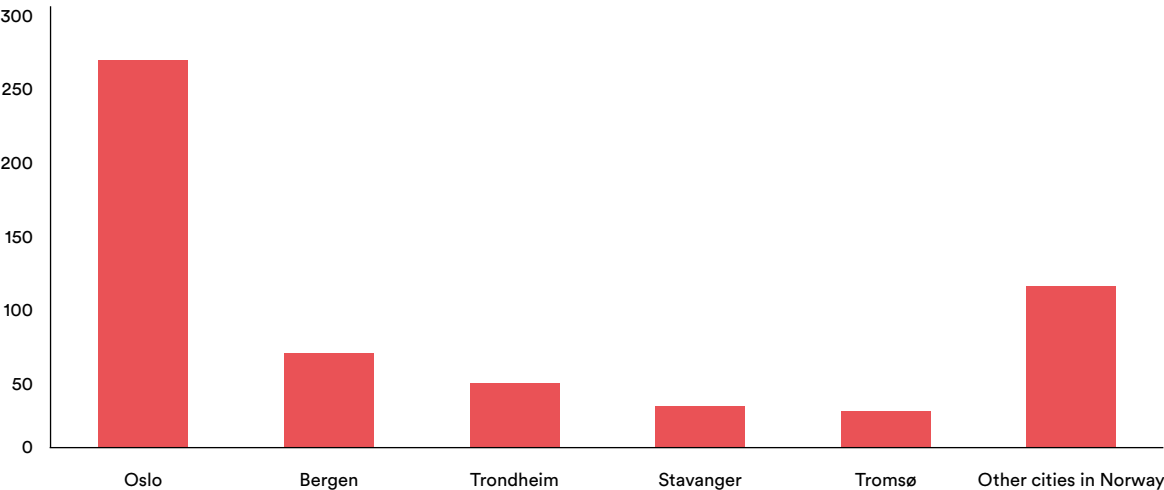
Number: 50-8,000 While in Norway the average is around 250 pax.

Decision time: Often there are long decision-making processes and the conference is often decided five years or more in advance.

The decision-making process: The ICCA estimates a growing minority of approximately 25-30 percent of all decision-making processes include an official application procedure, but are decided by a central initiator who selects the destination and venue based on predetermined and strict criteria.

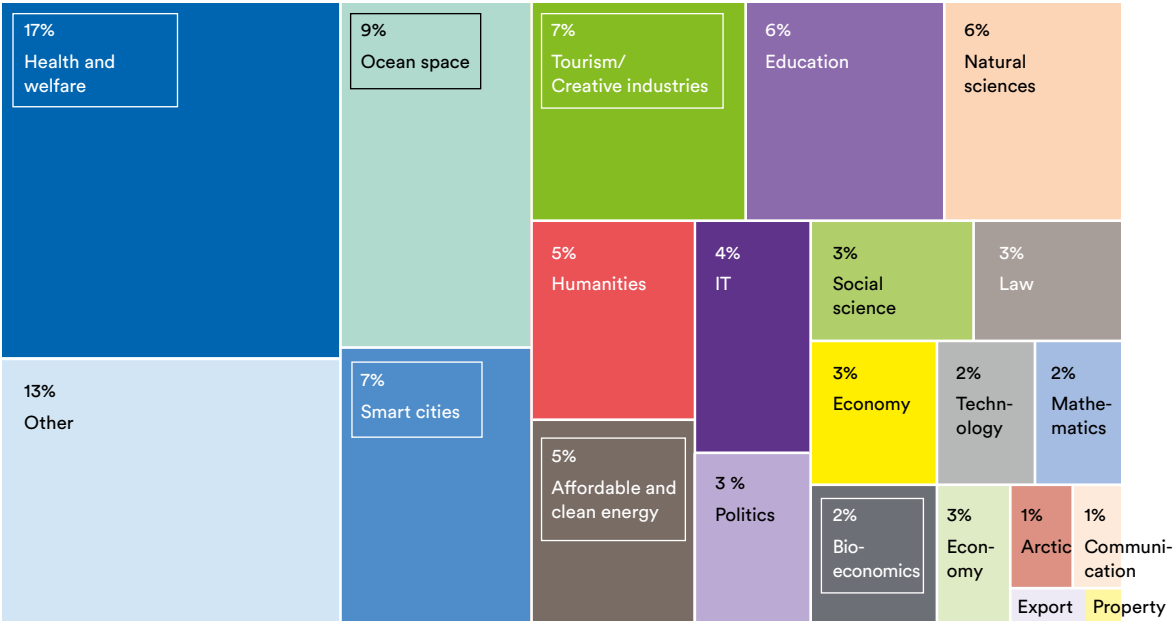
Source UIA og ICCA

Number of congresses distributed by city

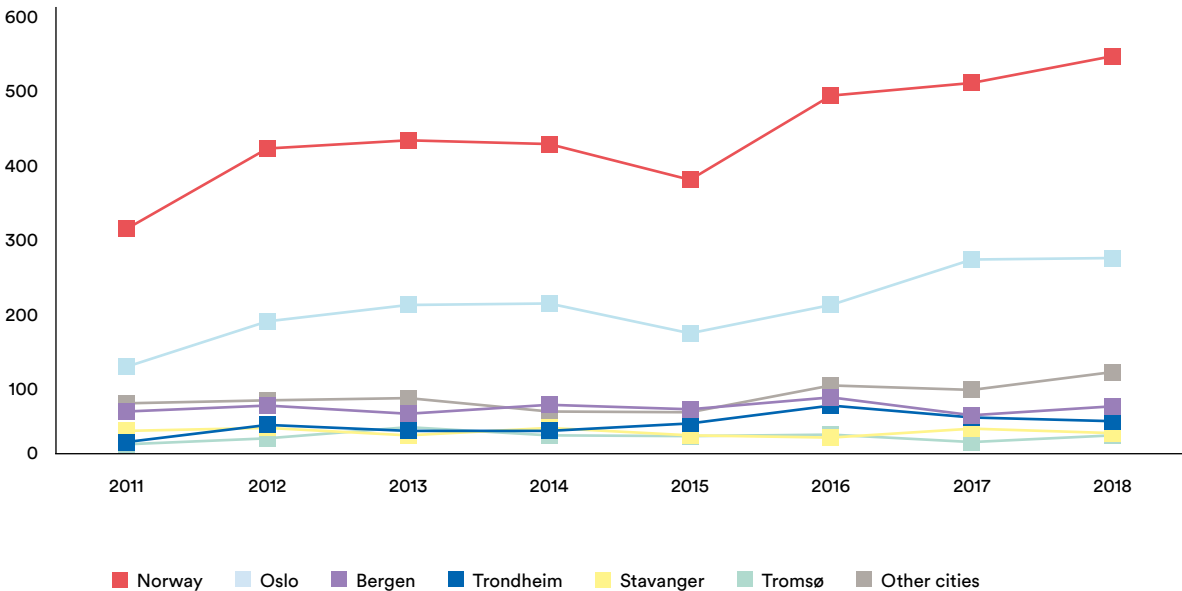


Themes of the congresses in Norway last year.

The themes of the framework are the six focus areas of Innovation Norway, i.e.; Health and welfare, Ocean space, Creative industries and tourism, Smart cities, Clean energy, Bioeconomics.



Development congresses in Norway 2011–2018



Innovation Norway in brief

INNOVATION NORWAY'S objective is to be the Norwegian Government and Regional authorities' main instrument for achieving value-creating business development throughout the country.

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

Innovation Norway has many clients, yet 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 responsibility is to contribute to value creation by creating corporate and socio-economic profitable business development throughout the country.

Innovation Norway's programmes and services are intended to create more 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 administers 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 Norwegian Ministry of Trade, Industry and Fisheries (51%) and the regional authorities (49%).



Definitions

ARRIVAL: Holiday or business travel with a minimum of one overnight stay.

BRAND TRACKER: Innovation Norway conducts weekly surveys in the majority of the main markets in which Norway is marketed as a tourist destination. The survey is conducted among people in our target group 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. At the same time, the survey also indicates whether the marketing work conducted is providing the desired results.

COMMERCIAL OVERNIGHT STAYS:

Overnight stays in hotels, campsites, cabin villages and youth/family hostels.

FOREIGNER: Person who lives outside Norway.

HOLIDAY TRAVEL: Travel for which the main purpose is reported to be:

- visiting family and friends
- holiday and leisure travel, including skiing holidays
- shopping

LONG HOLIDAYS: Four or more overnight stays.

NORWAY'S TARGET GROUP: When Innovation Norway markets Norway as a holiday destination, we specifically target people who are interested in experiences that are typical for Norway. For example, wild, untouched nature, beautiful scenery or outdoor activities such as skiing, walking, sport fishing, cycling or dog sledding. Other examples include local culture, art and way of life. In surveys, such as the Tracker, the respondent must have travelled within the last three years and had at least one overnight stay not paid for by their employer.

OVERNIGHT STAYS: Number of overnight stays during the trip.

REGIONS: Fjord Norway: Møre og Romsdal, Sogn og 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 HOLIDAYS: One to three overnight stays.

SUMMER SEASON: The period from the beginning of May to the end of August.

THE TRAVEL SURVEY: A sample survey conducted by Statistics Norway, the purpose of which is to survey Norwegians' travel habits in Norway and abroad.

TOURISM SATELLITE ACCOUNTS:

The purpose of the satellite accounts for tourism is to describe the economic effect of tourism, in a way that is comparable and consistent with other parts of the economy described by the national accounts. The satellite accounts for tourism are an integral part of the annual national accounts and are prepared by Statistics Norway.

TOURISM SURVEY: Innovation Norway conducts a nationwide and annual survey in which Norwegian and foreign holiday and leisure tourists, as well as business visitors are interviewed at tourist attractions, ski resorts, harbours, airports etc.

TOURIST ARRIVAL: Includes figures for holiday-, leisure- and business travel with at least one overnight stay.

TOURIST/TOURISM: Activities of individuals who travel and stay in places that are outside their ordinary place of residence, regardless of purpose, for a period of less than one year. Individuals who are employed in the country they are visiting fall outside the scope of this definition.

TRADE-WEIGHTED EXCHANGE

RATE INDEX: A nominal effective exchange rate calculated based on the exchange rate of the Norwegian kroner against Norway's 28 most important trade partners.

TRAVEL COMPANION: Travel companion means individuals who travel together with shared finances.

UNWTO: World Tourism Organization.

WINTER SEASON: The period from the beginning of January to the end of April.

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