



Forecast for Norwegian and foreign holiday and leisure traffic in Norway

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Optimism at the start of the summer season – there are many signs that the fifth summer season in a row with good growth from abroad is about to start

With four good summer seasons in a row, the Norwegian tourism industry and foreign actors who sell Norway as a destination are optimistic. Innovation Norway's forecasts are clear: the expert panel comprised of 160 representatives of the tourism industry at home and abroad is expecting another good summer.

The expectations for large and important summer markets such as Germany, the Netherlands and Sweden are high. Much indicates that the growth from the USA and China will continue. There are bigger challenges with the traffic from the United Kingdom, which has slowed a bit in the last year.



Mattias Fredriksson/Fjord Norway

The world's population is travelling like never before. Long-term brand building between the Norwegian tourism industry and Innovation Norway is producing results. A weak Norwegian krone and Norway being considered a safe travel destination may be some of the factors behind the good growth

- **The world's population is travelling like never before and we are also benefiting from this increased wanderlust**

Figures from the World Tourism Organization (UNWTO) show that 2017 was the seventh year in a row with major growth in international tourism. There was a total of 1.32 billion international tourist arrivals around the world. That is 7% more than in 2016 and represents 83 million more trips across national borders.

- **The Norwegian krone is still weak**

Norway remains highly competitive. The Norwegian krone has been relatively weak in relation to many other currencies, which means foreign tourists get more for their money during their stay.

- **Considered one of the safest destinations in the world**

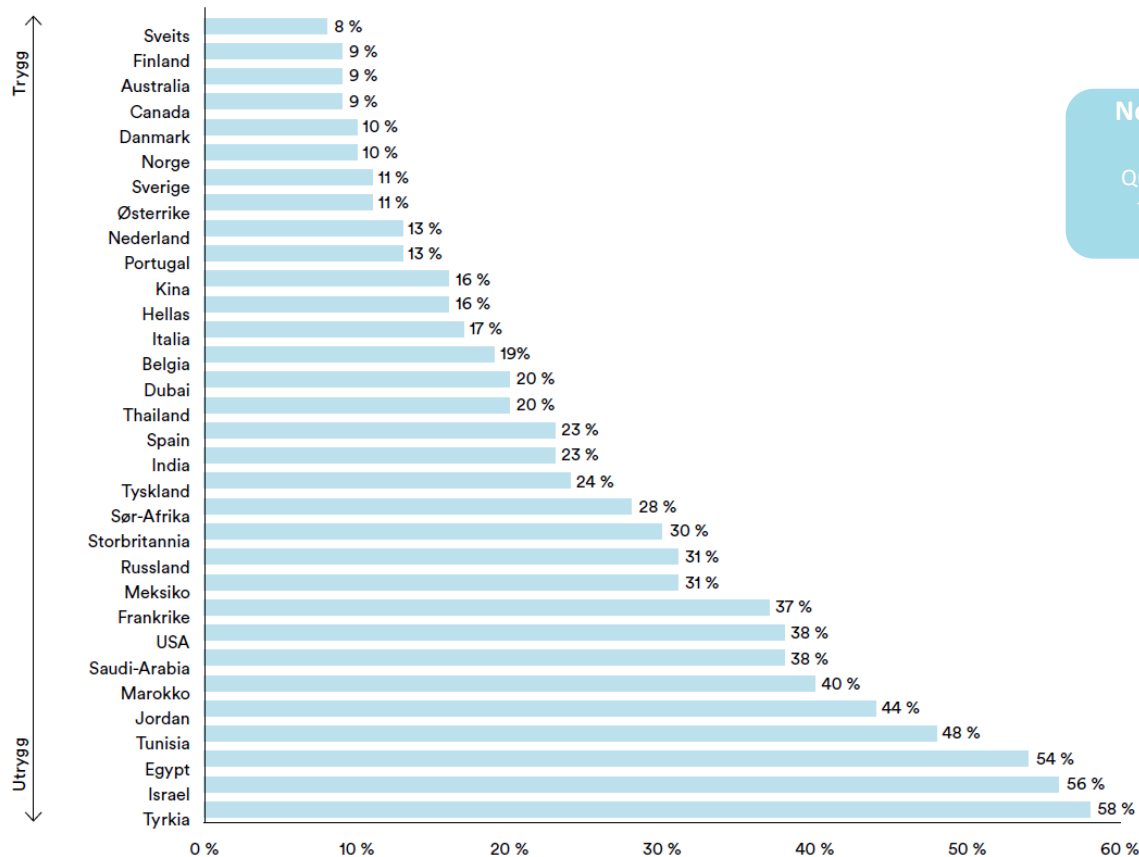
Figures from IPK International show that Norway is still considered one of the safest travel destinations in the world.

- **Long-term brand building**

A good partnership between the Norwegian tourism industry and Innovation Norway has generated greater interest. Innovation Norway's own tracker survey shows that interest in Norway as a holiday destination continues to rise in important foreign markets. This is also resulting in more searches concerning Norway online. The number of holiday-related searches increased by 16% from 2016 to 2017.

Spørsmål:

Ville du bekymre deg for terrortrusler hvis du reiste til følgende destinasjoner?



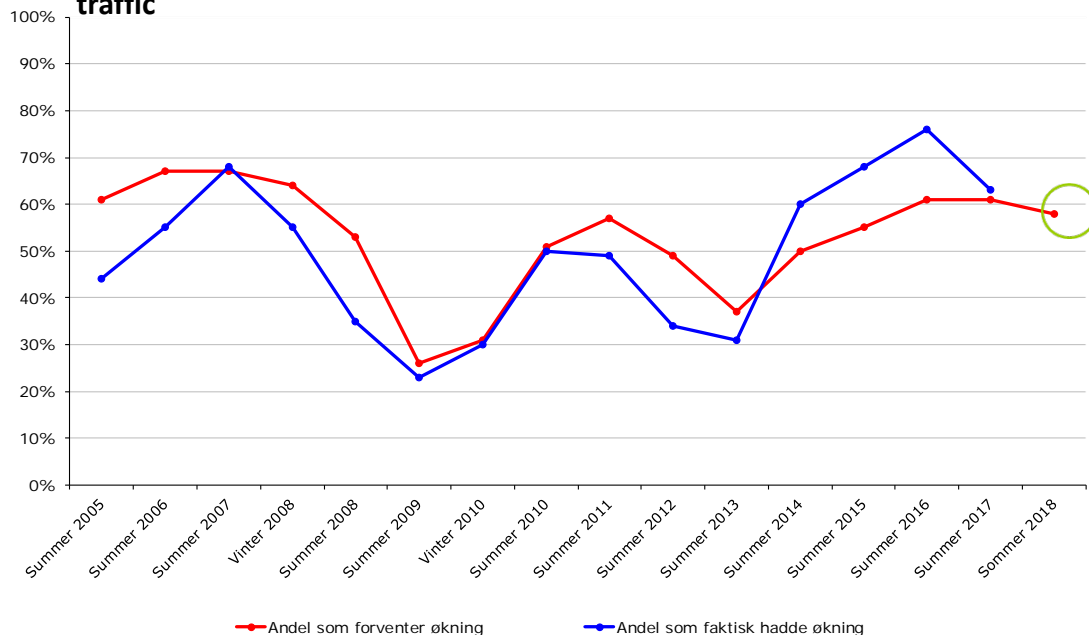
Norway is considered one of the safest travel destinations in the world

Question: Would you be concerned about the threat of terror if you travelled to the following destinations?

The strong growth in the summer months in the last few years exceeded the Norwegian tourism industry's expectations

This year, 58% believe this year's summer season will be better than last year's. We are thus starting the fifth summer season in a row with good tourism growth

The graph shows the relationship between expectations and actual traffic

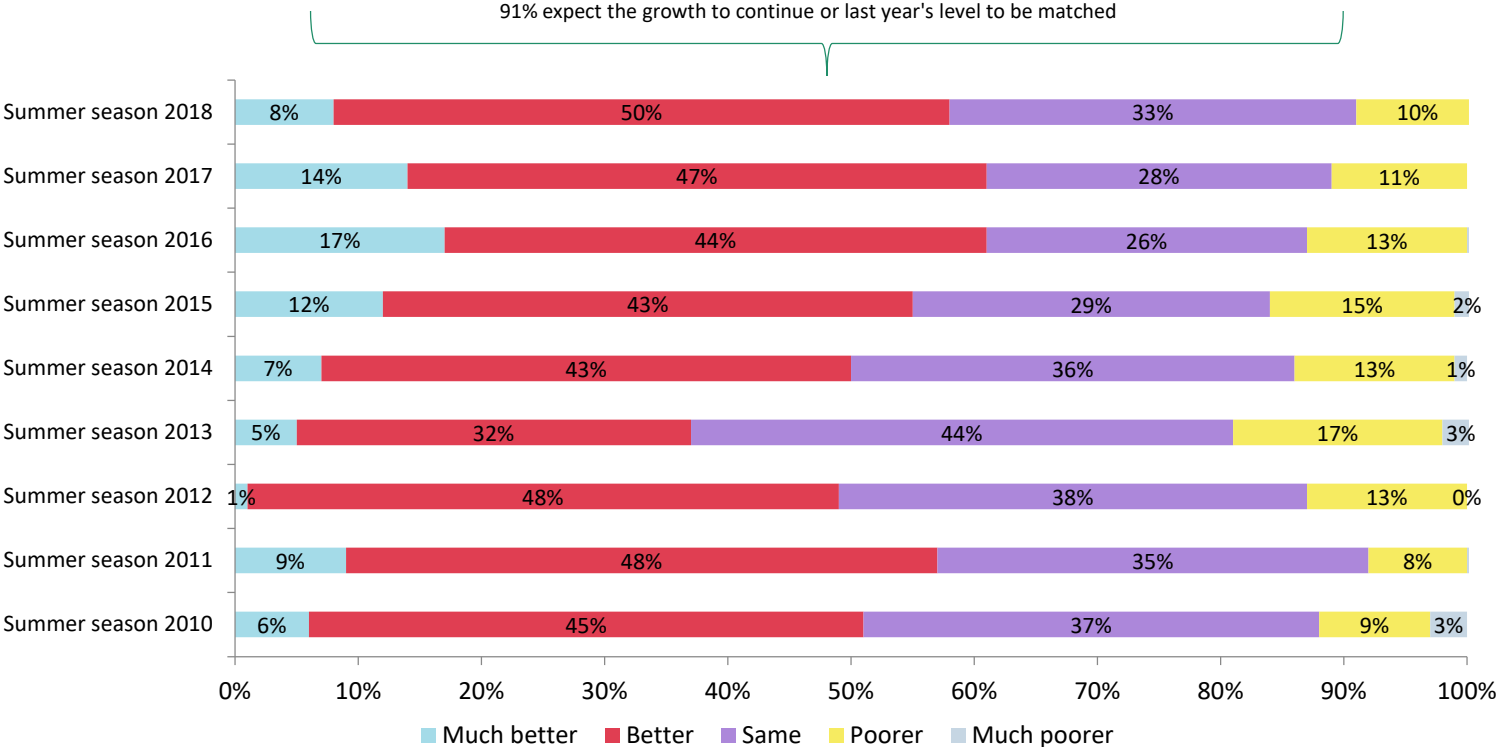


Question:

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

At the start of the summer season, 58% expect the growth to continue. 33% think the summer will be as good as last year, while 10% expect a downturn.

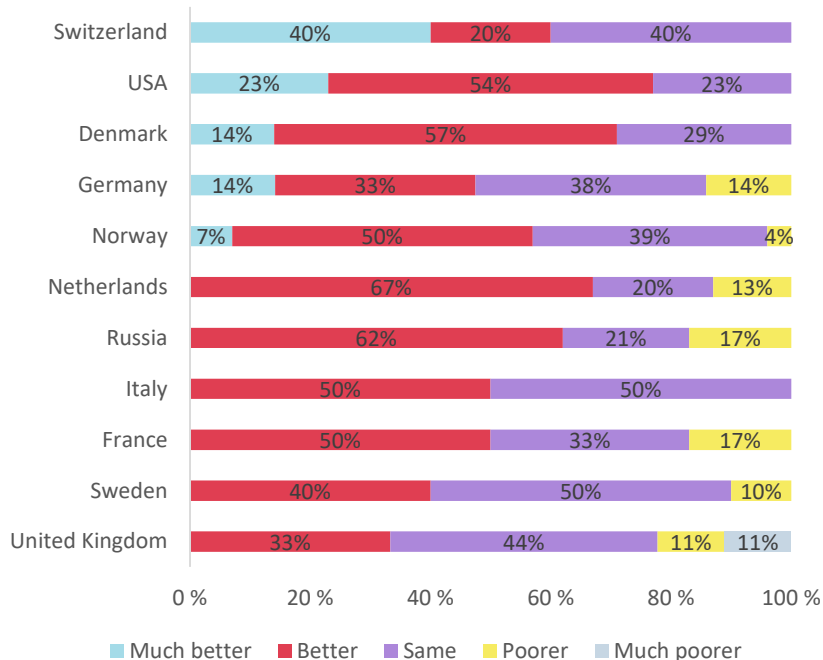
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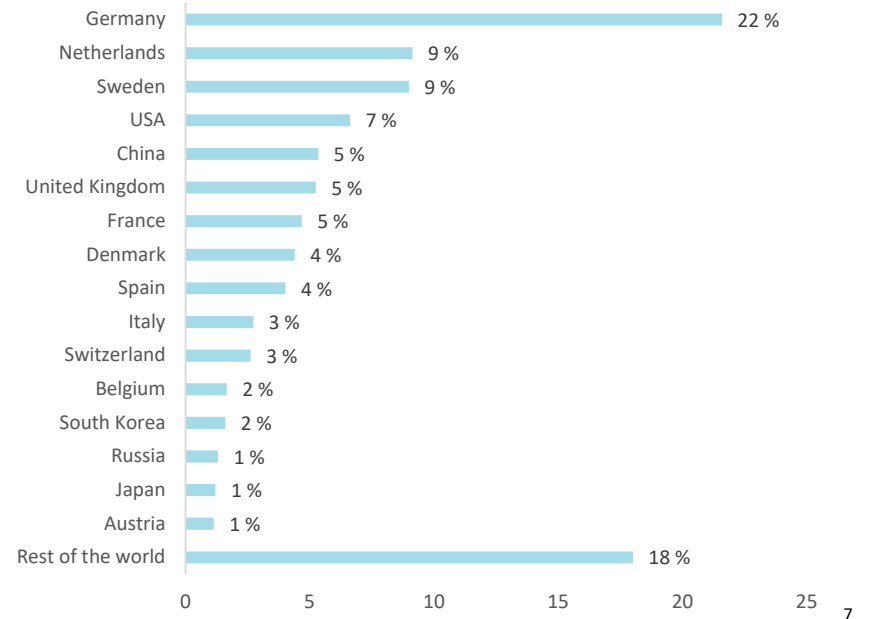
Expectations per market and size of the market

The expectations for large and important summer markets such as Germany, the Netherlands and the USA. Much indicates that the growth from the USA and China will continue. There are bigger challenges with the traffic from the United Kingdom, which has slowed in the last year.

Expectations per market at the start of the summer season 2018

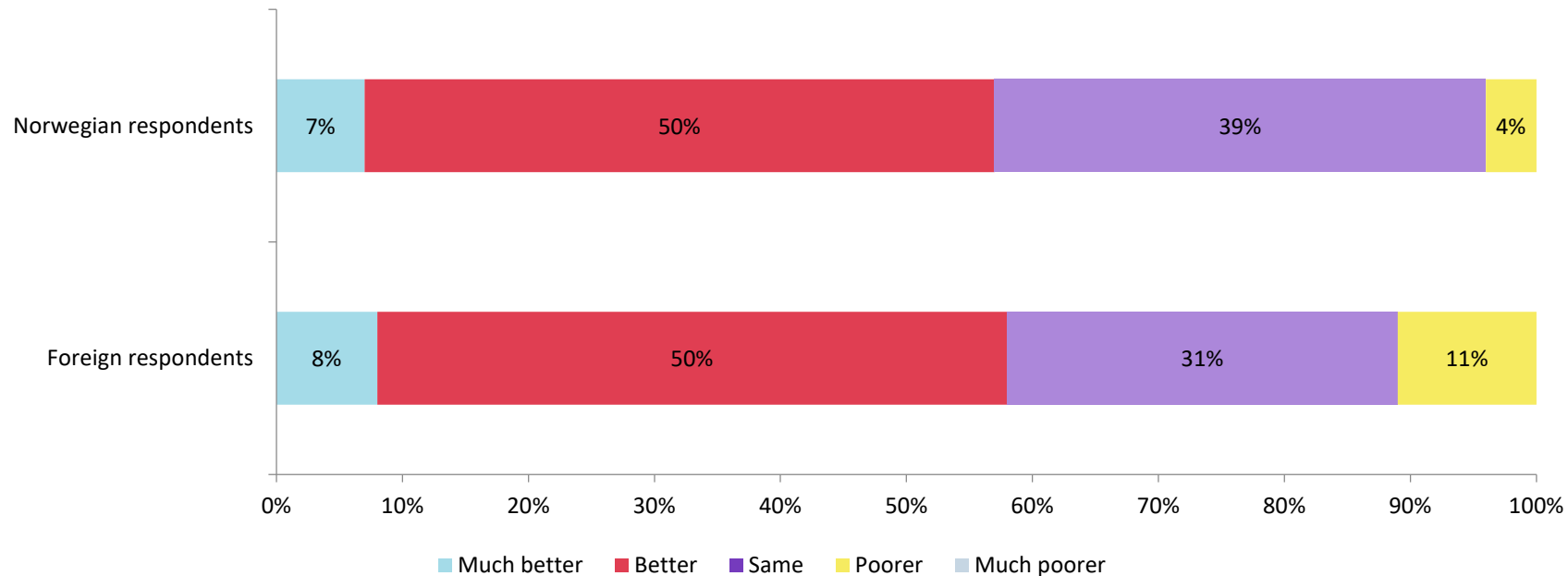


The size of the market measured as the proportion of commercial overnight stays in the 2017 summer season



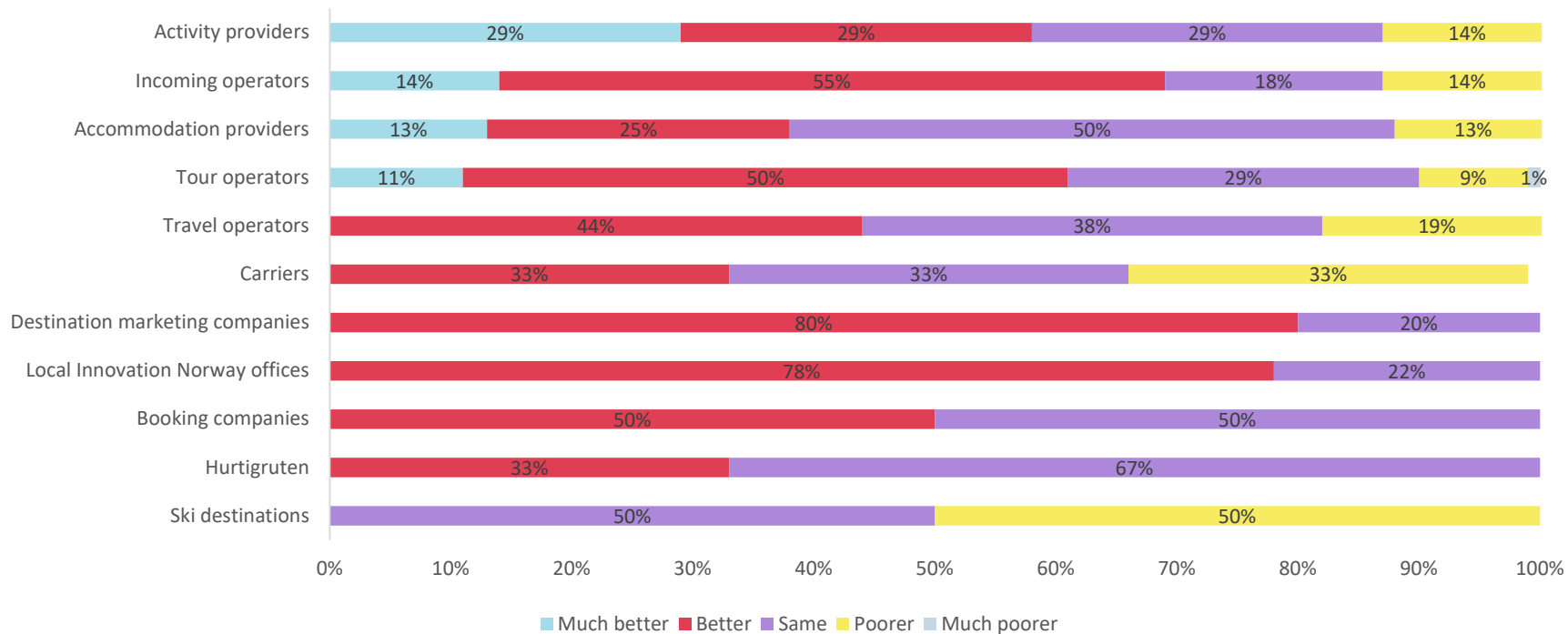
Expectations for the summer season: Norwegian v. foreign respondents

The expectations of Norwegian and foreign respondents are fairly similar



Expectations for the summer season per sector

61% of the foreign tour operators, who represent the largest single group in the survey, believe this year's summer season will be better than 2017's.



A look back

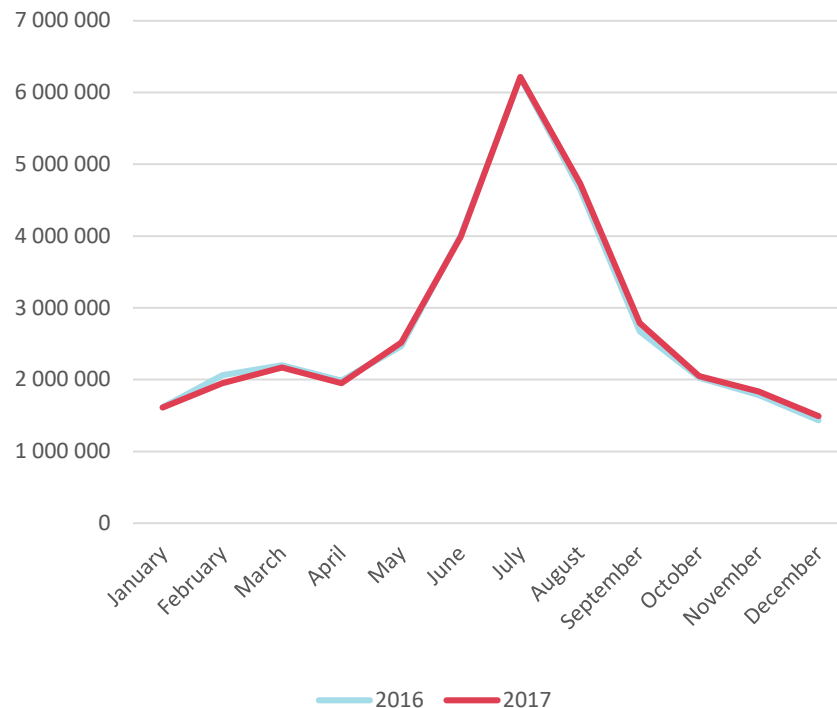
Traditionally, the tourism industry in Norway has been largely seasonal

More than half of all overnight stays occur in the summer months

Tourism provides greater prosperity, economic growth and employment across the world, but the economic benefits of tourism are not distributed equally. And neither are they in Norway. Traditionally, the tourism industry has been largely seasonal, with more than half of all overnight stays in the summer months of May to August. Some regions of the country can experience periods when there are too many tourists, while others would welcome more.

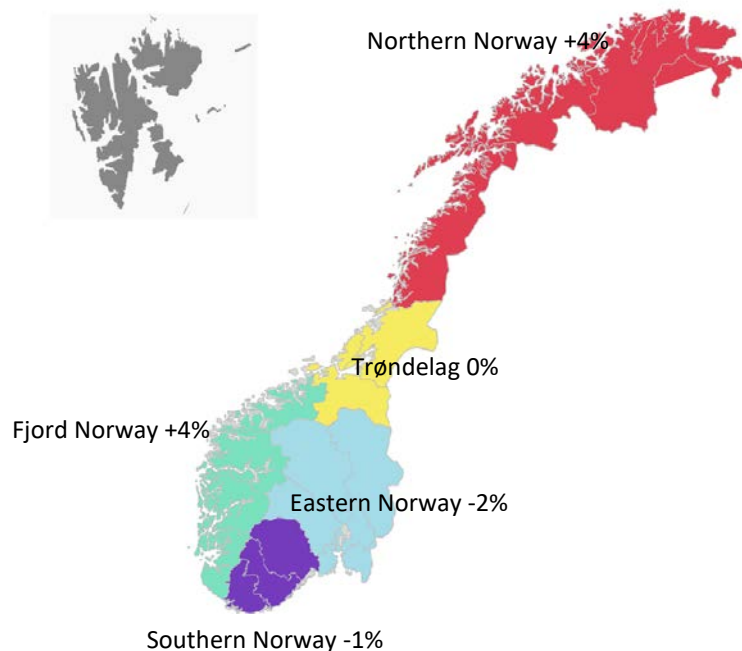
This trend was further reinforced in 2017

The tourism industry made a profit this year thanks to a good summer season. Figures from Statistics Norway show that 66% of the growth in the number of commercial overnight stays came in the summer season. This means that 52.4% of all overnight stays were in the four summer months. The growth in the summer months was not evenly distributed across the country either. To a large extent, it was concentrated around Fjord Norway and Northern Norway.



Only Fjord Norway and Northern Norway saw more overnight stays in the summer season 2017

The graph shows the change in commercial overnight stays per region in 2017



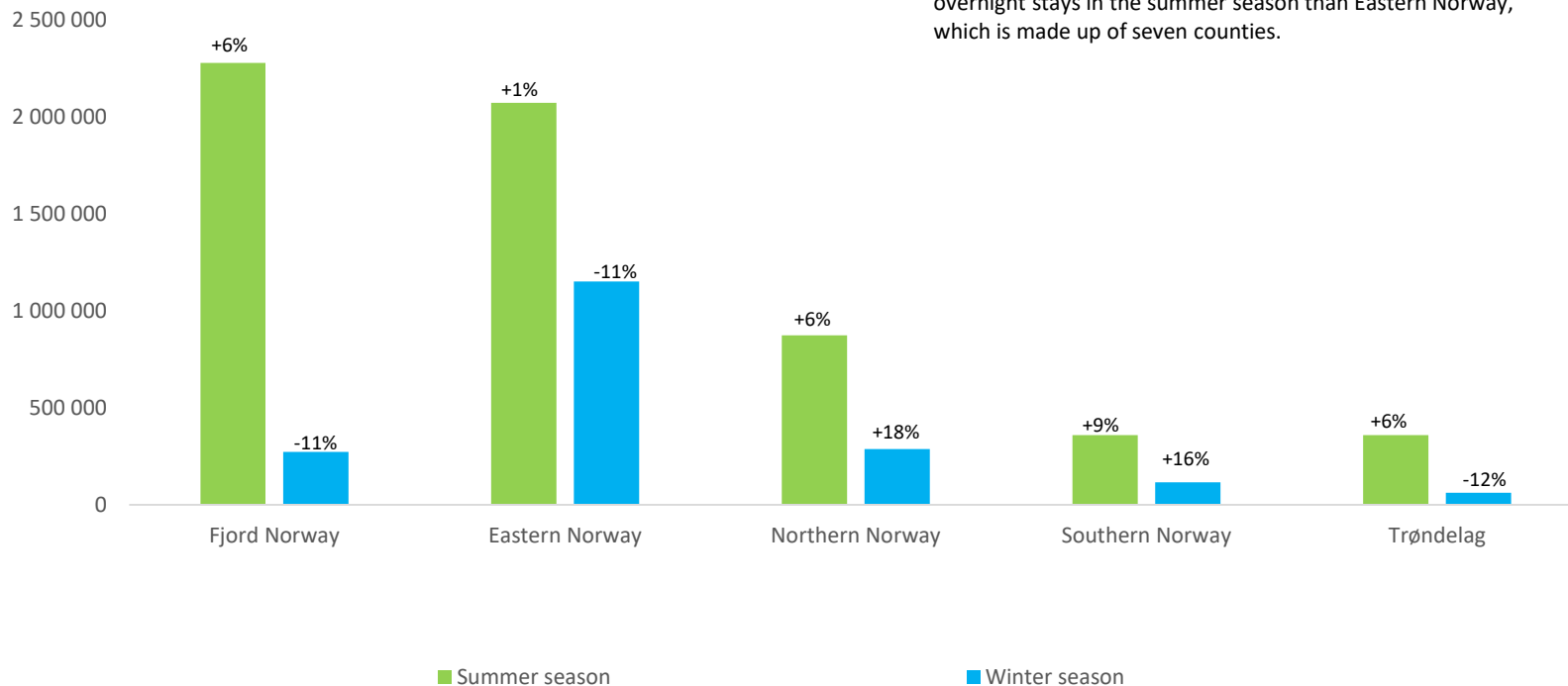
- Only Fjord Norway and Northern Norway saw a rise in overnight stays in 2017.
- Fjord Norway grew because of the growth in the summer season, while Northern Norway saw good growth in both the winter and the summer season.

The number of foreign overnight stays in the main seasons in 2017, and changes from the year before

Foreign overnight stays.

The regions have been sorted by the most foreign overnight stays in the summer season

The four counties that make up Fjord Norway had more foreign overnight stays in the summer season than Eastern Norway, which is made up of seven counties.



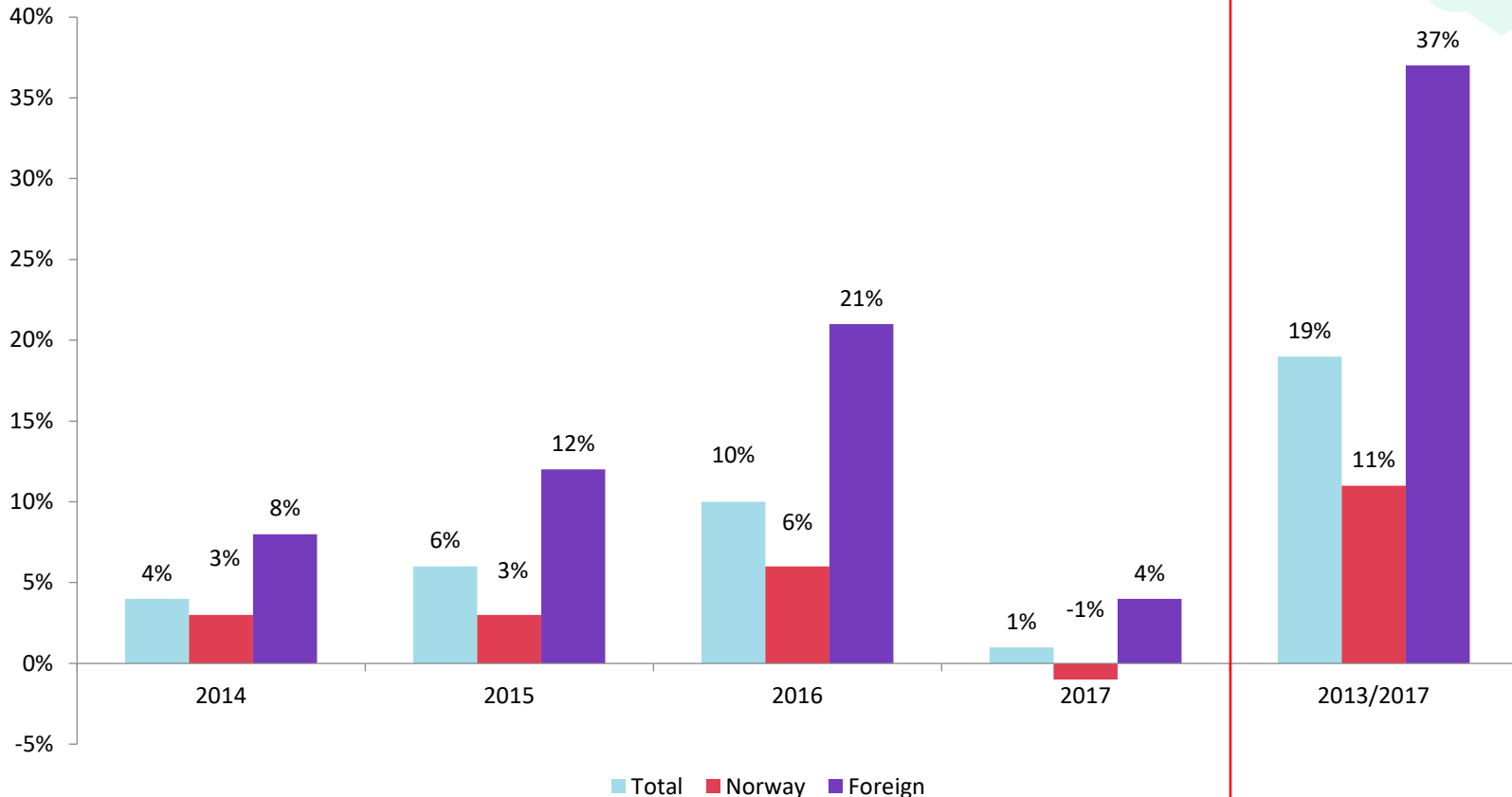
Summer season: May-August 13
Winter season: January-April

Source: Statistics Norway

We are at a far higher level now than we were back in 2013

2017 was the fourth year in a row with growth in the summer season

Commercial overnight stays, change in the summer season

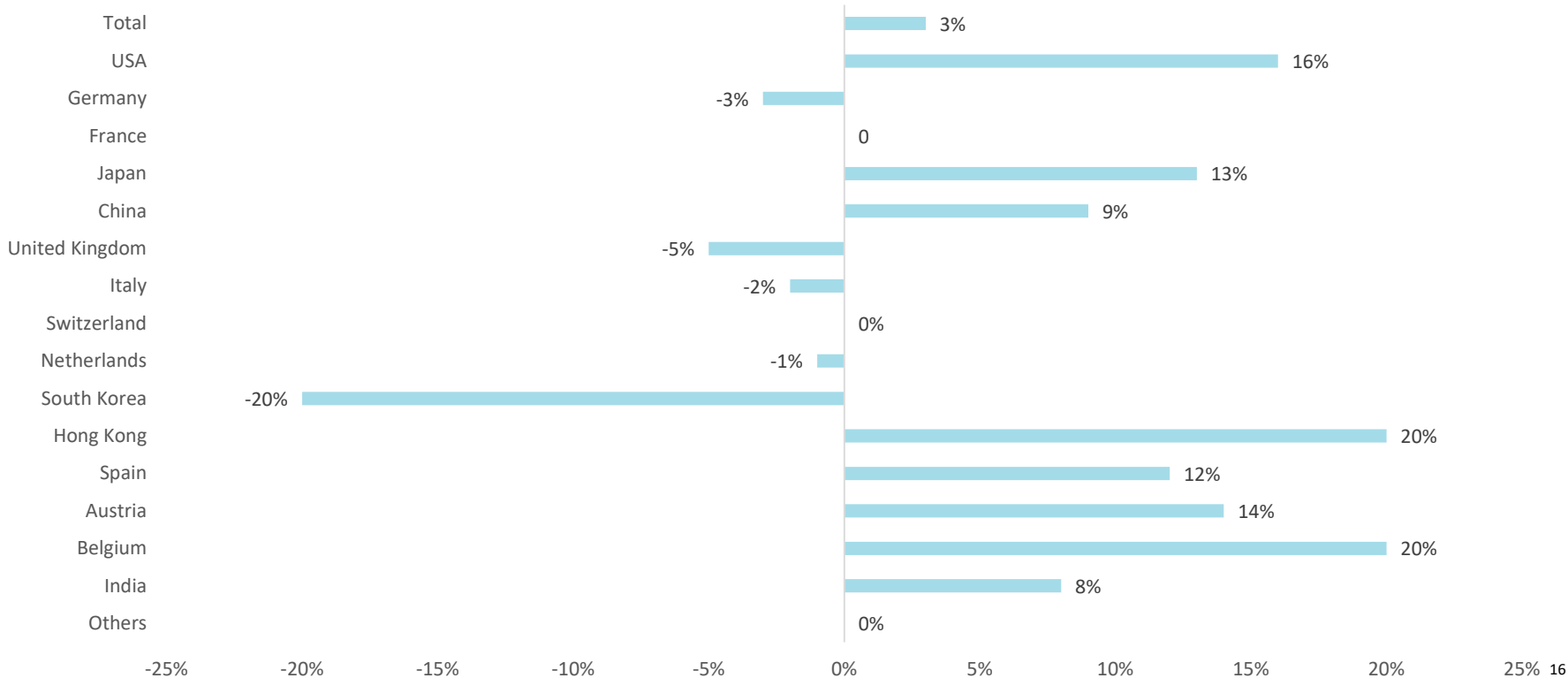


Innovation Norway's Tourism Survey shows that 45% of foreign holidaymakers arrive in Norway by air

2.6% more air tickets have been booked for the period 1 May to 31 August this year than compared with the summer season 2017.

The figures show a drop in May but good growth in the rest of the summer.

The graph is sorted by most air tickets booked from 1 May to 31 August, and shows the change from the same period in 2017



Background and methodology

- An electronic questionnaire was sent out and was accessible from 24 May to 9 June 2018.
- 160 participated in the survey.
- The purpose of the Tourist Barometer is to provide an overview of the expected growth in traffic broken down by markets and sectors.
- Those who participate in the survey have over the last 12 months been involved in Innovation Norway's campaigns and activities, with the exception of the Norwegian inbound operators.
- The expert panel is made up of representatives from the tourism industry at home and abroad. These represent tour operators, inbound operators, accommodation providers, carriers, cruises, activity and attraction enterprises, local tourist offices, regional destination marketing companies, and Innovation Norway's marketing managers in the respective markets.
- The survey is conducted twice a year, before the summer and winter seasons.
- This is the 31st time the Norwegian Tourist Barometer has been conducted.



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