

## Norway

### Tourism in the economy

In 2014, Norway's GDP stood at USD 499.7 billion. In 2011, the Norwegian tourism industry employed almost 150 000 people, and tourism represented 3.2% of total GDP. Annual wealth creation attributable to tourism was NOK 70 billion in 2013. Wealth creation in the tourism industry increased by 24% between 2010 and 2013, and doubled in the preceding ten-year period. However, despite the relatively high absolute growth in the Norwegian tourism industry, the share of total value creation has decreased from 6% in 2001 to 5% in 2013.

Exchange rate conditions in 2015 have benefitted tourism in the country, making a visit to Norway more attractive and less expensive.

### Tourism governance and funding

The main responsibility for development and regulation in the tourism industry lies with the Economic Policy Department at the Ministry of Trade and Fisheries. Innovation Norway is a state-owned company which functions as the National Tourism Administration. It works to promote nationwide development of tourism in order to increase overall economic growth within the tourism industry. Innovation Norway focuses on product and business development as well as international promotion and brand-building in order to attract a higher proportion of international tourists to Norway and increase profitability within the sector. This is achieved through various projects and activities, in close partnership and co-operation with the travel industry.

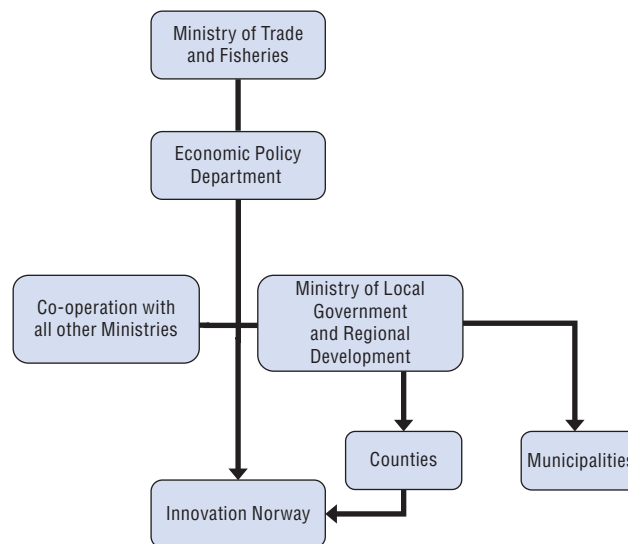
The Ministry of Trade and Fisheries co-operates with other ministries in order to co-ordinate policies in relation to the tourism industry. Co-operation with counties and municipalities is achieved in partnership with the Ministry of Local Government and Regional Development.

Some regional and local authorities have put in place strategies for tourism in their area of responsibility. A number also give financial support to the local destination management company.

Local municipalities play an important role in the tourism industry, having responsibility for infrastructure, waste management, national parks and local attractions. They are also responsible for tourist information. Local authorities are involved in marketing, planning and regulation.

The Ministry of Trade and Fisheries funds Innovation Norway on an annual basis. Between 2011 and 2013, there was a steady increase in funding from NOK 250 million to NOK 260 million, but in 2014 the level of funding dropped back to NOK 245 million.

### Norway: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Trade and Fisheries, 2016.

### Tourism policies and programmes

Norway's abundant nature and scenery are its main tourism attractions. In 2007, the Norwegian Government introduced Sustainable Norway 2015 to increase awareness of sustainable tourism, and to create an associated vision that gives baseline values and a clear direction for tourism development.

Sustainable tourism underpinned by a conscious and consistent effort on all matters concerning the environment, social matters and local prosperity is seen as a vital ingredient in building a stronger tourism economy in Norway. It also defines how Norway is keen to present itself to visitors. The country wishes to invite its guests to enjoy a memorable experience based on authentic local culture, food and history offered by welcoming and responsible hosts working in conjunction with their local community (Box 2.5).

This has required a holistic, inclusive and innovative approach that brings tourism into the new green economy. A Plan of Action has been drawn up to increase sustainability in travel and tourism, with responsibility shared between the Government, Innovation Norway and the tourism industry. A key feature has been the development and launch of a sustainable destination standard in 2015. The standard includes 45 criteria and 108 indicators to be measured, registered and monitored, covering nature, culture, environment, social values, community involvement and economic viability (Box 1.23).

The Government is preparing a *White Paper on Norwegian Tourism* for publication in spring 2016. Several ministries are involved in the process of mapping the challenges and developing policies to address these, including the Ministries for Transport, Environment and Agriculture.

The main priority is to define policies that will support the profitability and competitiveness of tourism. Norway is a high cost country and seen by incoming tourists as an expensive place to visit. Prices of goods, services and salaries are higher than in competing tourism destinations. Other challenges include the fact that the tourism industry is somewhat fragmented, although a large part of the industry is now working together towards a more efficient structure. The low season can be very challenging for the profitability of many tourist businesses.

## Statistical profile

Table 1. Norway: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	15 260	14 160	13 280	15 060	15 450
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	53 820	50 010	43 530	53 130	56 060
Hotels and similar establishments	10 320	9 000	9 540	10 500	11 320
Specialised establishments	..	..	..	..	..
Other collective establishments	12 190	12 390	10 460	11 370	11 330
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
<b>Top markets</b>					
Germany	1 637	1 595	1 511	1 306	1 385
Sweden	959	933	999	980	1 022
Denmark	914	841	859	821	735
Great Britain	520	519	572	581	614
Netherlands	800	742	679	517	539
Nights in all types of accommodation	7 903	7 844	7 897	7 635	8 094
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	7 590	8 150	9 260	9 280	9 190
Same-day visitors (excursionists)	..	..	..	..	..
<b>Top destinations</b>					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION NOK</b>					
<b>Inbound tourism</b>					
Total international receipts	..	43 103	44 404	..	..
International travel receipts	27 791	29 326	31 176	33 218	35 562 p
International passenger transport receipts	..	13 777	13 228	..	..
<b>Outbound tourism</b>					
Total international expenditure	..	103 763	112 351	..	..
International travel expenditure	84 766	90 086	98 122	108 115	118 138 p
International passenger transport expenditure	..	13 677	14 229	..	..

.. Not available; | Break in series; p Provisional data

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320343>

Table 2. Norway: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2013	2010	2011	2012	2013	2014
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>15 327</b>	<b>144 200</b>	<b>147 700</b>	..	..	..
Accommodation services for visitors	3 172	22 100	22 800	..	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	10 060	40 700	41 800	..	..	..
Passenger transport	..	49 900	50 600	..	..	..
Air passenger transport	..	9 100	9 000	..	..	..
Railways passenger transport	..	4 600	4 600	..	..	..
Road passenger transport	..	26 600	27 400	..	..	..
Water passenger transport	..	9 600	9 600	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	7 300	7 300	..	..	..
Travel agencies and other reservation services industry	2 095	5 000	5 100	..	..	..
Cultural industry	..	12 900	13 700	..	..	..
Sports and recreation industry	..	6 300	6 500	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320353>

Table 3. Norway: Internal tourism consumption

Million NOK

	2011		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>94 096</b>	<b>34 430</b>	<b>128 526</b>
Tourism characteristic products	65 897	19 004	84 901
Accommodation services for visitors	7 935	5 122	13 057
Food and beverage serving services	11 279	5 295	16 574
Passenger transport services	27 679	7 167	34 846
Air passenger transport services	16 856	3 966	20 822
Railways passenger transport services	1 905	508	2 413
Road passenger transport services	3 685	494	4 179
Water passenger transport services	5 233	2 199	7 432
Passenger transport supporting services	..	..	..
Transport equipment rental services	302	207	509
Travel agencies and other reservation services industry	16 402	225	16 627
Cultural services	1 066	440	1 506
Sports and recreation services	1 234	548	1 782
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	28 199	15 426	43 625
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320366>



From:

## OECD Tourism Trends and Policies 2016

Access the complete publication at:

<http://dx.doi.org/10.1787/tour-2016-en>

### Please cite this chapter as:

OECD (2016), "Norway", in *OECD Tourism Trends and Policies 2016*, OECD Publishing, Paris.

DOI: <http://dx.doi.org/10.1787/tour-2016-31-en>

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