Structure and geography of the inbound tourist flow distribution in Norway

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Abstract

Norway is a highly developed country with unique landscapes on a global scale and therefore very attractive for tourists. The aim of the study is to identify the geographical features of the distribution of the incoming tourist flow to Norway. The article examines the dynamics and structure of the inbound tourist flow to Norway for the period from 2005 to 2019. The study is based on statistics on tourism and population posted on the official website of the Central Bureau of Statistics of Norway. Cartographic analysis made it possible to identify the main countries from which tourists come to Norway and the proportion of these countries (both on a national scale and in the context of provinces), as well as to classify the provinces by the volume and share of inbound tourist traffic, tourist load. Most tourists to Norway come from Germany, Sweden and the North Sea countries, and recently the number of tourists from the USA and China has sharply increased. Among the provinces, Oslo, Hordaland and Akershus are the leaders in terms of incoming flow, and the tourist load per capita is highest in the Spitsbergen archipelago, the provinces of Western and Northern Norway. The role of cruise transportation of tourists is shown. The main development problems are highlighted. Based on the Norwegian experience, recommendations are given for the development of tourism in the Russian Arctic.

Keywords list (en): inbound tourism, tourist flow, Norway, tourism geography, Arctic tourism, cruises

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Introduction. Norway is one of the richest countries of the world with a share of tourism in its gross domestic product being 9%. The main tourist resource of Norway is unique fiord coastal landscapes. The cost of services in the country is also one of the highest in the world that to a large extent predefines the structure of tourist flow. The article uses administrative and territorial division of Norway as in 2019. This year predated the beginning of world tourism crisis connected with pandemic of COVID-19, that allowed us to examine tourism geography in Norway from its height and to the steep downfall of the scale of inbound tourism.

The goal of the research is to identify the geographical features of the distribution of the incoming tourist flow to Norway.

Informational basis and level of prior studies of the problem. There are rather few studies dealing with geography of international tourism in Norway. Analysis of publications on this topic revealed several main lines of the research. One of them is dedicated to the duration of tourists stay in Norway [12]. The other relates to the research of an image of the country by international visitors [10]. As Norway is a country with the highly developed tourist sector, it faces the problem of “extra-tourism” that means an excess amount tourist causing deterioration of the tourist center. This problem is dealt by a large group of researchers [16]. As well, the target of research can be the whole tourist sector of economy of Norway in the context of innovation development of tourism as in studies by Zakharov A.N. and Ignatyeva A.A. [2], and the strategies of its development as in the article by Mosalyov A.I. [8].

Geographical aspects of tourism in Norway are mentioned in works on features of tourism development for certain territories (e.g. on Lofoten Islands [3] or Finnmark province [11]) or on different kinds of tourism (in particular, to ecological [1; 4] or ethnic one, which includes Saami [9]). Generally, we must admit that geography of touristic flows in Norway is insufficiently researched.

Previously we conducted a research of geography of inbound tourism flow in Finland [7]. It was identified that the territories which are the part of transboundary touristic recreational regions (TTRR) [5; 13–15], as a rule, have higher tourist flow and larger share of tourists from neighboring country. Norway has an extended land border with Sweden, Finland and a small part of the border with Russia, where we identified Russian-Finnish-Norwegian TTRR of microlevel with a small annual tourist flow [6]. Tourist flow from Russia to Norway is small and decreased considerably since 2013.

Methodology and novelty of the research. As an informational basis of the research there was used the official statistics on tourism in Norway, which is in open access at the site of the Central Bureau of Statistics of Norway. The peculiarities of Norwegian statistics are that the amount of inbound international tourists is not divided by the countries of arrival. For that reason, to examine the structure of international tourist flow at countries level we used the statistics of overnights staying of international tourists. The article as well used statistics on number of passengers of cruises, which is recently published in annual reports on tourism. To evaluate the load of international tourist flow on 1 resident we additionally used the data on number of residents in provinces. As a result of the conducted cartographic analysis we classified provinces of Norway on value of tourist flow, a share of tourists from some specific countries and tourist load (a ration of number of tourists to number of people living in a province). There was also a typology of provinces developed at the basis of leadership of specific countries in general number of international tourists.

Results of the research. Counting of arriving from abroad tourists to Norway is done in two ways. The first one is a traditional: number of arriving tourists based on statistics from places of accommodation (hotels, camping etc.). This allows to count the number of tourists used their services, but there is no published date on countries of their arrival. Pic.1 presents the dynamics of inbound tourist flow to Norway in 2004-2019 based upon the statistics on number of inbound tourists and their use of accommodation facilities.
Statistics on inbound international tourists to Norway divided up by the countries is available for the other index that is several overnight stayings of tourists in accommodation facilities. Recording of the indicator started since 2005. Unfortunately, it does not allow to see the number of tourists from certain countries but let us examine their share and relation between the countries. Pic. 2 shows the distribution of tourist flow between counties of arrival.

Throughout the study period, Germany is the leader in the number of overnight stayings in Norway - the number of overnight stayings in 2019 compared to 2005 increased by 12% and increased to 1.96 million, and in total, the share of tourists from Germany in the structure of
overnight stays is 18%. Its leadership is due to three reasons: the geographical proximity of Germany and Norway, the visa-free regime (both countries are part of the Schengen area) and the high average income of residents of Germany.

Sweden takes the second place in the number of overnight stayings in Norway. Since 2005, the number of overnight stayings by Swedish tourists has grown by 27% and amounted to 1.1 million in 2019 (10% of all overnight stayings). Sweden has a long land border with Norway, like Germany, is part of the Schengen area and has a high average income of the population.

EU countries with similar parameters among the leaders in terms of entry to Norway (the Netherlands, Denmark and the UK) have a negative trend in the number of overnight stayings. At the same time, a significant increase in the number of overnight stayings for tourists from the United States (almost 2 times) and from China (7.5 times) is noteworthy.

In general, in inbound tourism, the prevalence of countries facing the North Sea, that is, geographically close to Norway, is noticeable. There are also quite a large number of tourists from Sweden, which directly borders on Norway and has close historical and cultural ties with it. In 2005, this was especially noticeable: the countries of the North Sea and Sweden provided 67.3% of the inbound tourist flow. This ratio was maintained until 2009 inclusive. As a result of the post-crisis growth in tourist traffic, the share of these countries began to decline steadily, reaching 48.9% in 2019. The share of these countries was replaced mainly by the United States and China, the total share of which increased from 5% in 2005 to 13.3% in 2019, as well as other EU countries (first of all, these are countries with a high population: France, Spain, Poland, Italy, as well as Finland bordering Norway), the share of which increased by 5.3% over the specified period.

Pic. 3 shows the overall scale of inbound tourism in 2019 at the county level of Norway, which is also distributed by the share of foreigners in the total number of tourists. Inbound tourist traffic in Norway is generally not characterized by over-concentration in one or two centers: in the main tourist center of Oslo, the capital of the country, 23% of the tourist flow (965 thousand international tourists) is concentrated, and in the second largest center, the province of Hordaland (here the old the city of Bergen, several large waterfalls, Eidjford and other attractions) - 16% of the tourist flow (661 thousand international tourists). Five more provinces have an annual tourist flow of more than 200 thousand: these are Akershus and Buskerud provinces located near Oslo, Sogn og Fjordane (there is the longest fjord in the world Sognefjord, the Briksdalsbreen glacier and Stavirka in Urnes - a UNESCO World Heritage Site), Troms, located in the Arctic Circle, and Rogaland, home to the oil capital of Norway Stavanger and one of the most accessible fjords for tourists, the Lysefjord. The smallest tourist flow is recorded in Svalbard, as it is the most remote and inaccessible territory, where tourism opportunities are significantly limited.

In terms of the share of international tourists, in addition to the metropolitan provinces and provinces of Western Norway, the two polar provinces of Troms and Finnmark stand out, as well as the Spitsbergen archipelago, which has a special international status. In the Arctic, traditional Norwegian fjords are complemented by beautiful aurora borealis, and bowhead whales and polar bears can also be seen on a cruise to Spitsbergen. Also, in the county of Finnmark there is one of the most northern points of Europe - Cape North Cape, to which a road is laid. The smallest share of international tourists is in the provinces of Southern Norway and Trøndelag.

Cruise transportation of tourists is also of interest, since good views of the shores of the fjords are often opened from the water. The cost of a seat on a cruise ship is quite high, but a tourist can get all the necessary services on board. Data is publicly available for the 12 largest Norwegian cruise ports in terms of passenger traffic, so they are also mapped. The busiest cruise ports are Bergen (576,000 cruise passengers in 2019), Stavanger (460,000 cruise passengers) and Geiranger (Møre og Rumsdal county, 402,000 cruise passengers), all located in Western Norway. It should also be noted that the leading cruise ports include two Arctic ones: Tromsø, which is also the base port for cruises to Svalbard and other Arctic territories, and Honningsvag, located near the North Cape.
Pic. 4 shows the load of international tourist flow per 1 inhabitant, calculated as the ratio of the number of international tourists to the population of the provinces. This indicator usually directly depends on the total volume of the flow of international tourists, but it also allows us to highlight the territories that are most attractive in natural terms and therefore usually have a relatively low population density. In Norway, by this indicator, the Svalbard archipelago is leading by a large margin, where there are 12 tourists per inhabitant. This can be explained by the low number of resident population in the archipelago - less than 3 thousand people. The provinces of Western (Hordaland and Sogn og Fjordane), Northern Norway (Troms and Finnmark) and Oslo also stand out in terms of the load of international tourist flow per capita, where the share of international tourists is high.
Pic. 4. The proportion of the number of international tourists to the number of inhabitants in the regions of Norway in 2019.

Pic. 5 shows the allocation of Norway provinces on the leadership of the leading international tourists supplying countries in 2019. In 13 provinces out of 19, tourists from Germany make up the majority of the inbound flow. Most of their share in the provinces of Western and...
Northern Norway, and in Eastern Norway - the smallest. Moreover, in two provinces (Akershus and Buskerud) their share is even less than 10%. It is noteworthy that in the main tourist center of the country, Oslo, there are fewer tourists from Germany than from the United States, and in Akershus, which borders Oslo and where Oslo International Airport (Gardermoen) is located, the majority since 2016 are tourists from China (a similar phenomenon observed in Helsinki).
Pic. 5. Allocation of Norway provinces on the leadership of the leading international tourists supplying countries in 2019

In two other provinces (Ostfoll and Hedmark), bordering Sweden and having a small general tourist flow, the majority of foreign tourists are Swedish citizens. Their share is also significant in almost all provinces bordering on Sweden, which suggests the development of cross-border tourism and the existence of cross-border tourist and recreational regions (TTRR).

As mentioned above, in Oslo, US tourists have the highest proportion of all international tourists. Also, the share of US tourists is high in Hordaland, Trondelag and Troms. In general, the share of tourists from the United States is highest in the provinces with a large tourist flow. Probably, the rapid growth of tourist flow from the USA, which has occurred in recent years, is associated with the successful promotion of the Norwegian tourist product in this country.

Tourists from Denmark make up the majority in Telemark, where the tourist flow is small, and Buskerud, where the average tourist flow is recorded. Also, the share of tourists from Denmark is high in almost all provinces of Eastern Norway. It is possible that there is a Norwegian-Danish TTRR: this is facilitated not only by geographical proximity, but also by the kinship of languages, culture and a common historical past.

British and Dutch tourists do not have a predominant share anywhere, however, due to the high volume of tourists from these countries, they are also noticeable in some provinces. Thus, tourists from the Netherlands have a significant share in Sogne og Fjordane, Oppland and the provinces of southern Norway. And tourists from Great Britain - in Rogaland, Hedmark and on the Spitsbergen archipelago.

The cross-border nature of tourism is indicated by the high proportion of tourists from Finland in the neighboring Finnmark county. The share of Russian tourists there is small (about 5%), but this is the highest figure for Russia among all Norwegian provinces. Earlier, the Russian-Finnish-Norwegian TTRR has already been allocated.

Conclusions. As a result of the study, the scale of inbound tourism in Norway, the structure of the inbound tourist flow and its distribution throughout the country were determined.

The geography of international tourism in Norway differs markedly from the neighboring countries of the Baltic region. Although these countries are important generators of tourist flow and have a high proportion of their tourists in some border regions, the largest tourist flow to Norway comes from Germany. It should also be noted that there is a fairly large flow of tourists from other large EU countries, as well as a rapidly growing flow of tourists from the USA and China. Thus, the role of the coastal territories of Norway in tourism is much higher than that of the borderlands.

The highest tourist load (per capita) falls not only on the traditional tourism centers for Norway (Bergen, Sognefjord), but also on the Arctic territories, the ecosystems of which are considered highly vulnerable. This requires regulation of tourist flow, and such measures are already being taken (in particular, there is a tourist tax on Svalbard, which is paid by travel agencies from each ticket sold).

Most of Norway's tourism area is coastal, and the example of Norway can be used to develop tourism in the Russian Arctic. Although the natural beauty is difficult to compare, the anthropogenic part of the cultural landscape differs too much not in favor of Russia: the gap between the beautiful ceremonial maritime facade of Norwegian coastal cities and the harsh military-industrial maritime facade of most Russian cities (for example, Murmansk) is too large. In addition, there are many other obstacles in Russia: underdeveloped port and road infrastructure, visa restrictions and a lack of qualified personnel in the tourism industry.

Remarks:


References:


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Аннотация

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