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Nordic Centre for Spatial Development

## State of the Nordic Region 2016

# Close-up on migration and tourism

Lisbeth Greve Harbo and Lise Smed Olsen,  
Research Fellows



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# Migration terms

- **Internal / international migration:** migration between administrative levels and based on previous place of registration
- **Immigration / emigration:** national level
- **In-migration / out-migration:** regional / municipal level
- **Net-migration:** the difference between emigration and immigration or between in-migration and out-migration (+/-)

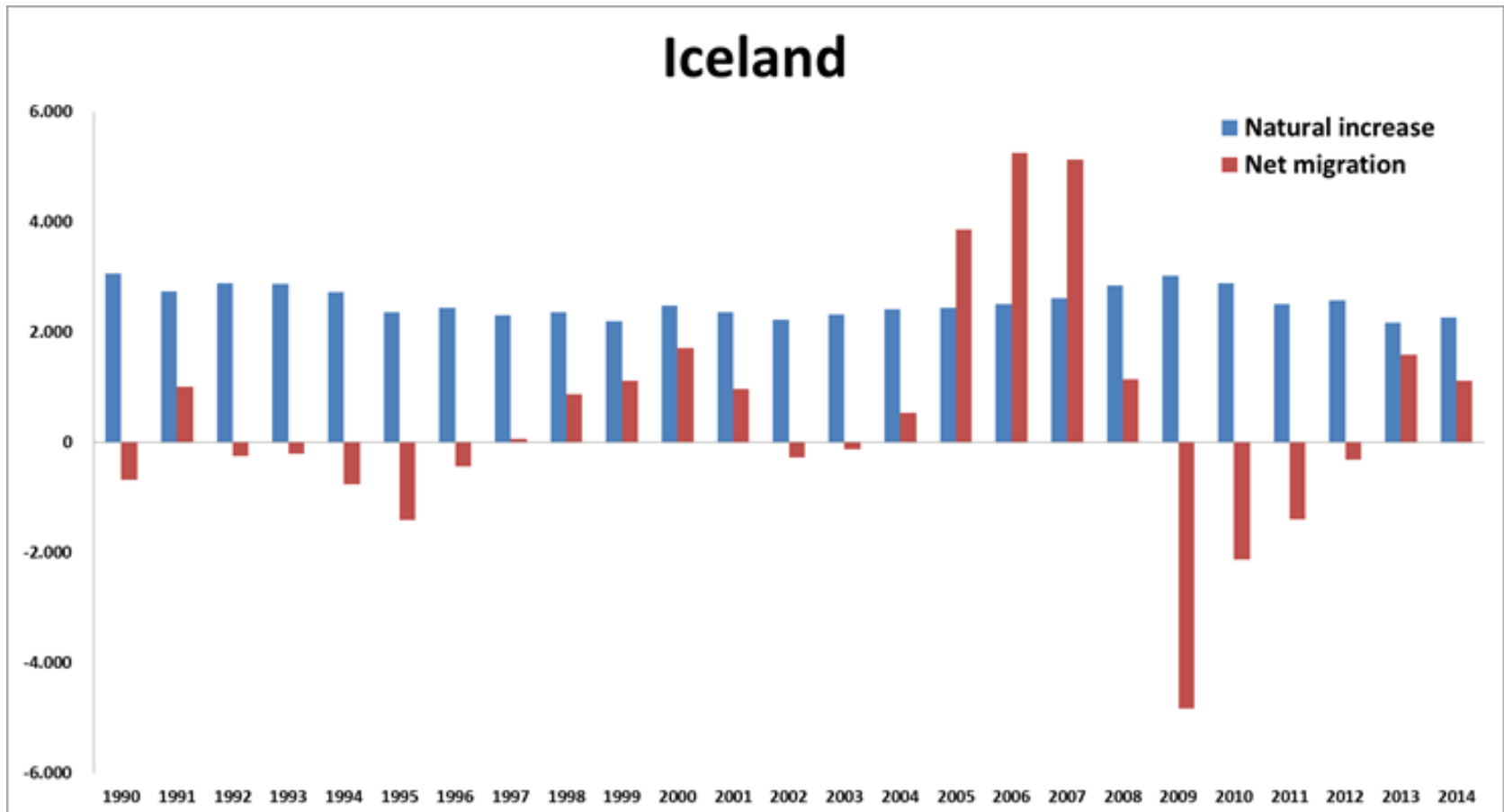
# Migration has been the main component of population growth in the Nordic Region

	1990	2015	Total	Natural increase	Net migration
Total population	23.2 mio	26.5 mio	3.3 mio		
Population change (absolute)				1.3 mio	2.0 mio
Population change (percent)			14 %	5 %	9 %

# Migration as the main component varies between the countries

	Population change, 1990-2015 (percent)		
	Total	Natural increase	Net migration
Norway	22,0	9,5	12,6
Sweden	14,3	3,9	10,4
Denmark	10,2	3,4	7,8
Åland	19,3	3,8	14,6
Greenland	0,8	22,9	-21,0
Faroe Islands	1,9	15,9	-13,9
Finland	10,0	5,2	4,6
Iceland	29,7	25,1	4,5

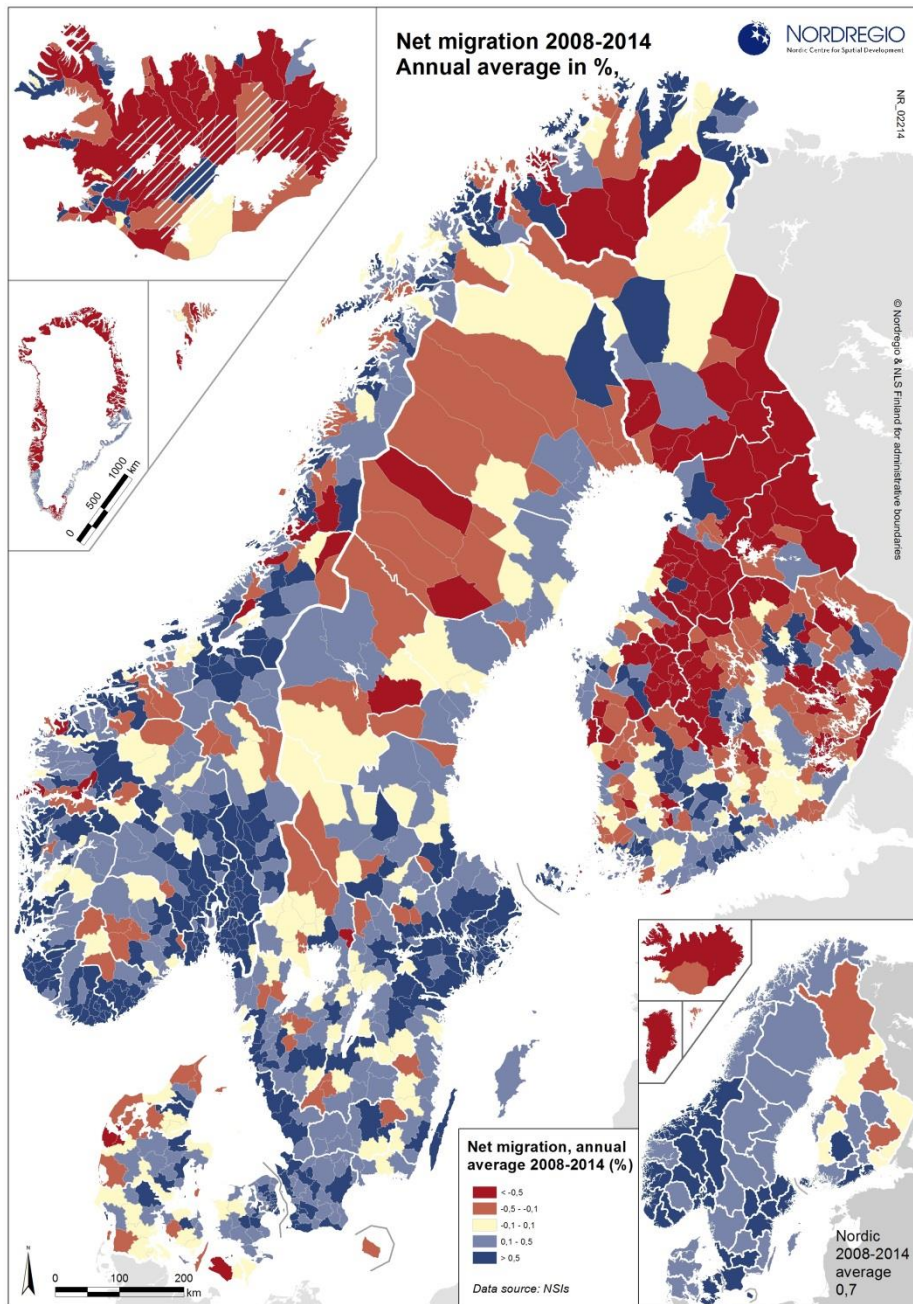
# Migration patterns varies over time



# Migration from where\* varies over time

From/To <u>Denmark</u>	2008	2011	2014
<b>Nordic countries</b>	804	1054	1970
<b>BSR</b>	11192	5954	6375
<b>EU</b>	6751	7862	11881
<b>USA</b>	474	1216	737
<b>Syria</b>	99	707	5420
<b>Others</b>	9939	5821	11082

\*where being last country of registration rather than nationality



## Migration patterns at regional and municipal level

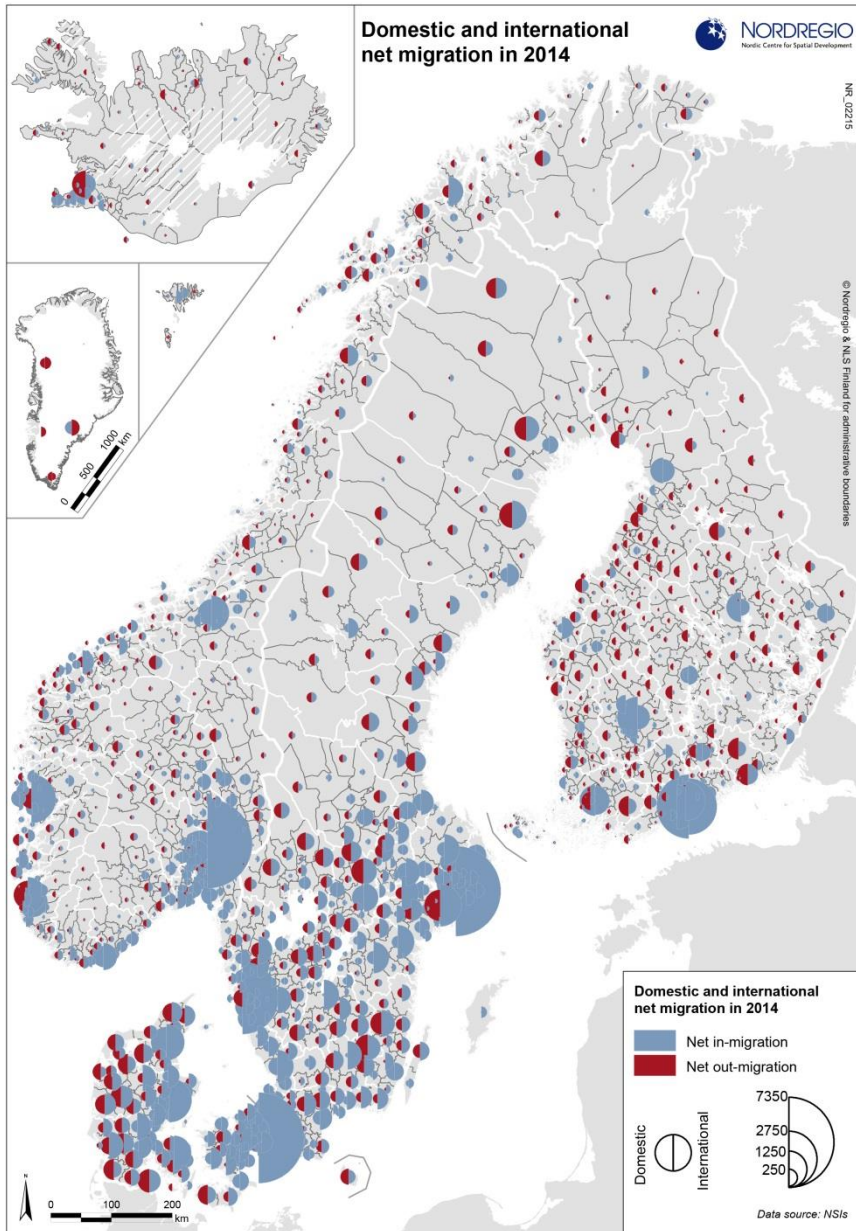
Clear pattern at regional level:

- Positive net-migration in Denmark, Sweden, Norway
- Out-migration from Greenland, Faroe Island and Iceland

More complex at municipal level:

- General confirmation of the urbanisation process
- But also exemptions from this general trend





# Importance of international net in-migration

- In absolute numbers, international immigration also concentrate in the metropolitan regions
- International immigration makes up for the internal out-migration from several peripheral and rural municipalities
  - without which they would be marked by even higher rates of depopulation



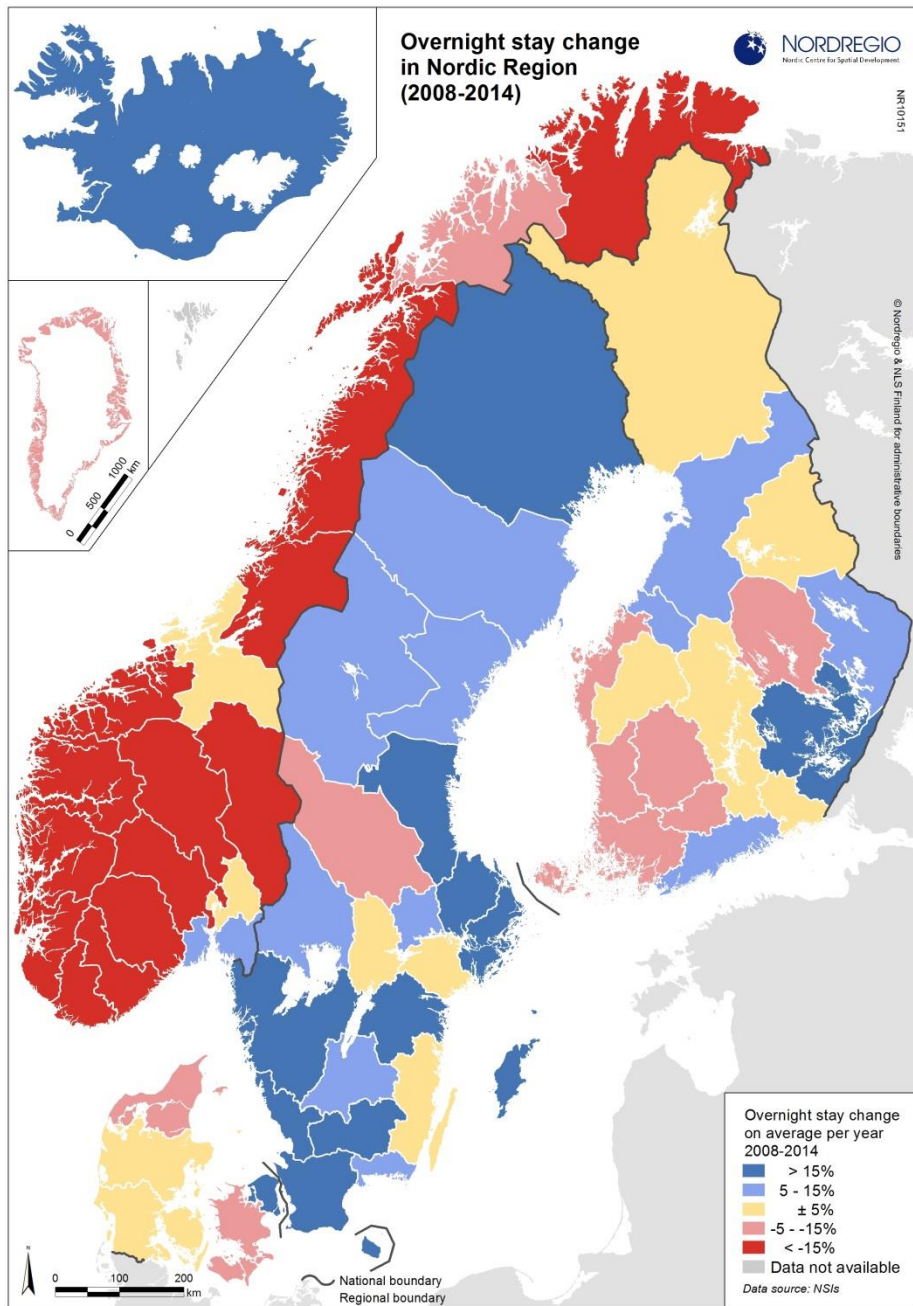
# Role of in-migration at local and regional level

## ■ Maintain / increase population

- Maintain/increase municipal/regional transfers
- Maintain services for the good of the whole population
- Potential for new opportunities on the local labour market?

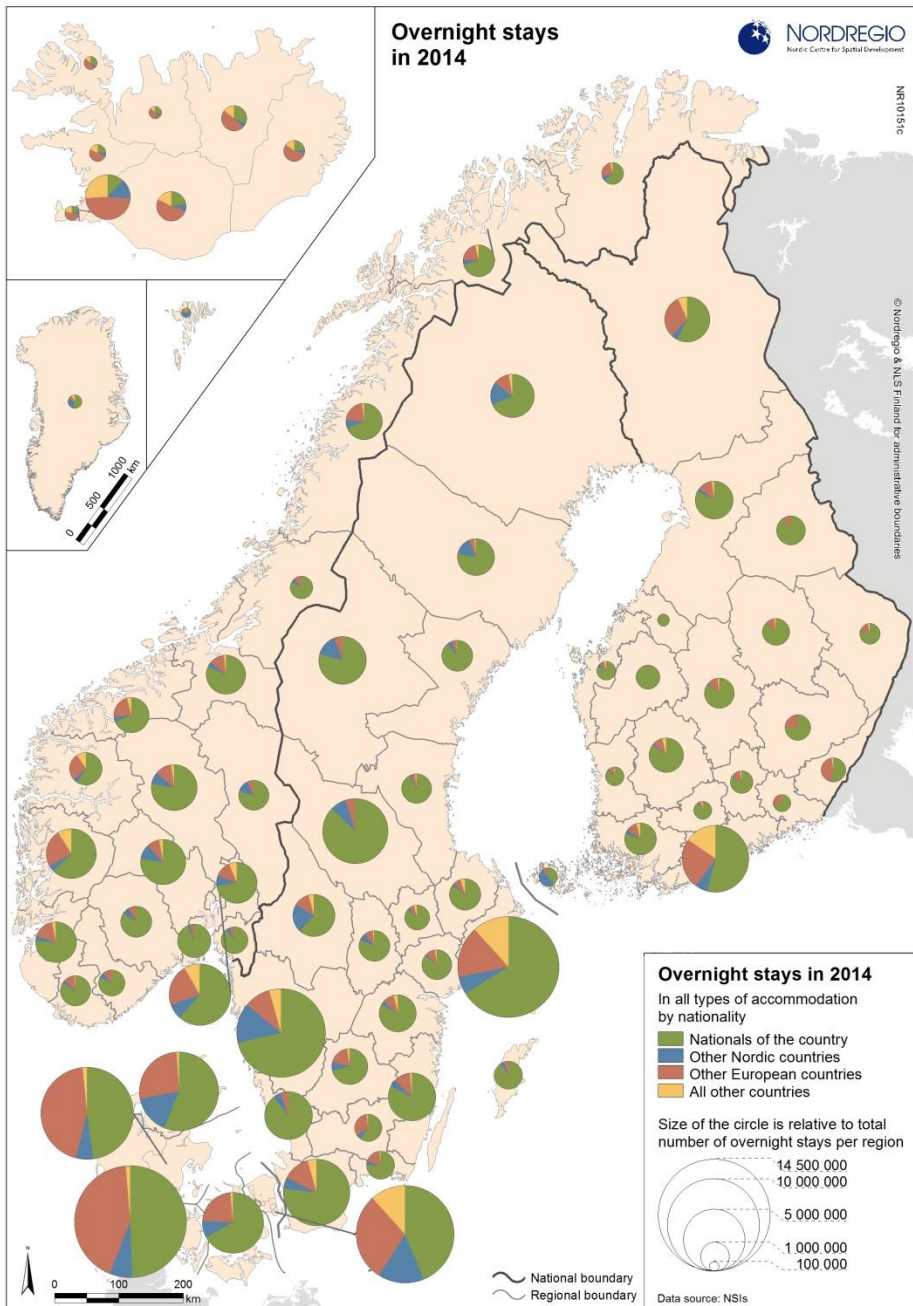
## ■ Meet local demands for labour

- Need for specialised employees
- Unable to attract internal labour
- Important local sectors with demand for international employees.
  - One of these is tourism where we in some local labour markets see a significant number of foreign employees



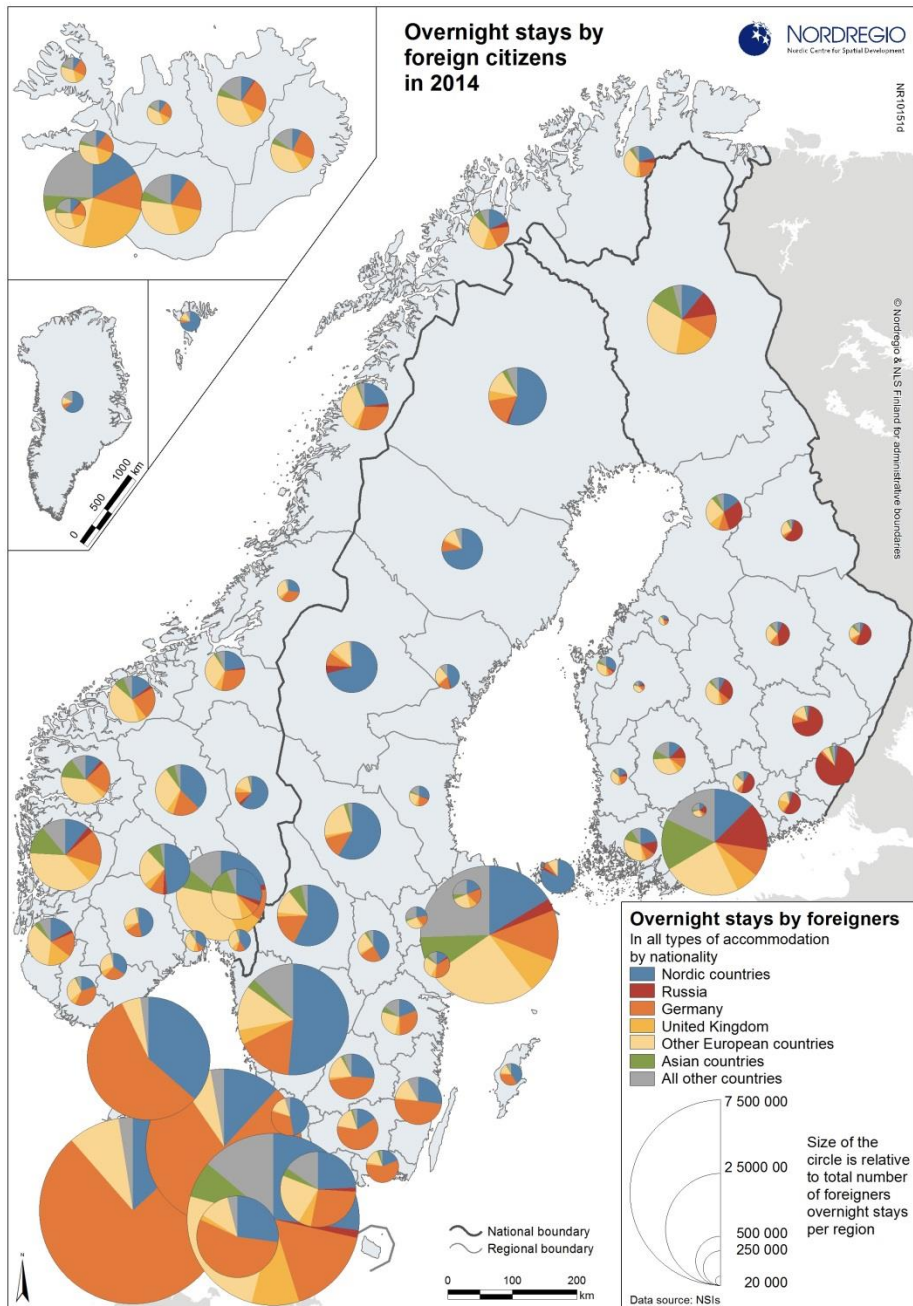
## Changes in overnight stays 2008-2014

- **Highest growth in Iceland** from 62% in Vesturland to 176% in Suðurnes
- **Sweden:** -9% in Dalarna / more than 20% increase in Stockholm and Kronoberg
- **Finland:** -13% in Kanta-Häme / 34% increase in Etelä-Karjala
- **Åland:** -14%
- **Denmark:** -9% in Nordjylland and Sjælland / 29% increase in Hovedstaden
- **Greenland:** -11%
- **Norway:** -47% in Sogn og Fjordane / 14% increase in Østfold



## Total number of overnight stays in 2014

- Concentration to capitals and other urban regions, the coastlines of DK and NO, Arctic destinations of FI and SE
- Domestic overnight stays form the majority in most regions – Iceland is the exception



## Overnight stays by foreign citizens in 2014

- Particularly in the Faroe Islands the share of overnight stays by other Nordic nationals is high (72% in 2014)
- A high share of German nationals in DK and South SE
- A high share of Russian nationals in FI
- A more varied mix of nationalities is evident in Iceland, Finnish Lapland, Norway, and in the capital regions



# Economic impact of tourism

- Tourism Satellite Accounts: a standard statistical framework
- Inbound tourism expenditure as a percentage of GDP:
  - Increasing impact in Iceland from 4.5% in 2009 to 7.4% in 2013 – above the OECD average of 4.7% (2012)
  - Steady impact in the other Nordic countries
    - 1.3% in NO, 1.9% in DK, 2.1% in FI, 2.5% in SE (2013)
- The regional economic impact of tourism is not uniformly documented across the Nordic Region



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