

Key Figures for Norwegian Travel and Tourism

2023



Contents

01	Introduction and Key Figures	3
02	The importance of tourism to Norway	8
03	International tourism and Norway's market share	15
04	Tourism Year 2023	24
05	Commercial overnight stays	35
06	Characteristics of holidaymakers	51
07	Environmental considerations	61
	The label for sustainable destinations	65
08	Norwegians' holiday habits	67
09	Cruise tourism and Norway's market share	70
10	Event tourism	76
11	International meetings/Conferences	79
00	Innovation Norway in brief	84
00	Definitions	85

01

Introduction and Key Figures



2023: Back to normal?

Since the pandemic, it has taken some time for tourists to return to Norway. While Norwegians continued to discover their own country, it took some time for foreign tourists to return. In 2022, the number of overnight stays by foreigners was eight per cent below 2019 levels. As of April 2023, there has however been a steady monthly growth, and the year ended with four per cent more foreign commercial overnight stays compared to 2019.

Is the mix of guests different today?

The most notable change since the pandemic has been that the largest markets have grown further and constitute a greater share of total overnight stays. When we look at the market mix from abroad, Germany has strengthened its position as our most important market, and it has increased its share from 18 per cent in 2019 to 21 per cent in 2023. With 2.3 million commercial overnight stays, the German market is twice the size of the American one, which is our second biggest market with 1.1 million overnight stays. Sweden, the Netherlands, Denmark, the United Kingdom and France follow respectively.

The United States is the only overseas market to be above its pre-pandemic level

Arrivals from Asia have still not recovered back to their previous levels, but this is not unique to Norway. Figures from UN World Tourism Organization (UNWTO) show that departures from Asia had not returned to normal in 2023. This means that the share of overseas commercial overnight stays is 19 per cent, compared to 24 per cent in 2019. In addition to German commercial overnight stays at hotels, campsites and holiday cabins, there has been a significant growth in the number of German cruise passengers and tourists in campervans outside of campsites. The largest number of German overnight stays mean that Germany is once again our largest foreign market, measured in economic contribution. Even though German holidaymakers do not have the highest average daily expenditure, they stay in the country for longer and there is a greater number of them, meaning that overall, they provide the greatest economic contribution.

Increase in overnight stays by Norwegians

After a long period of travel restrictions, overnight stays by Norwegians continue to increase, and they are increasing more than those of foreigners. This means that the share of overnight stays by Norwegians has increased from 70 per cent in 2019 to 73 per cent in 2023. According to Statistics Norway's Travel Survey, Norwegians went on holiday more compared to 2019, and almost as many as in the peak year of 2021, when we had limited travel options. Statistics Norway also reports that more Norwegians only took holidays within Norway. For the first time in a normal year, we have spent over half the holiday budget in Norway.

This may be related to the fact that the Norwegian krone has weakened significantly since 2019

The competitive exchange rate index, which measures Norway's competitiveness, has increased from 114 in 2019 to 129 in 2023. This development means that foreign tourists get more for their money when they visit Norway, while Norwegians experience reduced purchasing power abroad.

Growth from abroad is going to other forms of accommodation than hotels

Holiday traffic is driving growth in 2023, with a significant increase in both campervans and cruise tourists. Business traffic has not returned to previous levels, and the same applies to international meetings and conferences in Norway. The number of hotel stays is overall one percent above 2019, thanks to a four percent increase in Norwegian stays. The number of foreign hotel stays is five percent below 2019. Growth from abroad has largely been in camping, both on and off campsites, which is not captured in official statistics.

As such, it is positive that Innovation Norway could again carry out The Tourism Survey, which provides insight into overnight stays outside of official statistics. The basic data for 2023 shows a significant increase in the number of foreign tourists staying in campervans or tents, both at and outside of campsites, as well

as a larger proportion spending the night in privately rented homes and cabins.

Additionally, the number of cruise passengers visiting the country increased significantly. While the number of cruise passengers globally increased by seven percent from 2019, the number of cruise passengers in Norway increased by a remarkable 61 percent. The number of cruise tourists rose from 945,000 in 2019 to 1.5 million in 2023. As a curiosity, it can be mentioned that Norway accounts for 4.8 percent of all cruise tourism in the world, while for all land-based tourism (international arrivals), it is around 0.5 percent. The share of cruise tourism is nearly 10 times higher than that of land-based tourism.

The challenge is that the summer season is the peak season for both land-based and cruise tourism, which makes the work of visitor management and directing tourist flows even more important.

2023 marks the tenth anniversary of the labelling scheme for Sustainable Destinations

Sustainable Destination label Sustainable Destinations is a tool offered by Innovation Norway to destinations that want to work in a long[1]term and focused manner for sustainable tourism. Qualifying for the label does not mean that the destination is sustainable, however the label obliges the destination to long-term and structured work for more sustainable tourism. Concrete measures and solutions are implemented in collaboration with tourism, municipalities and important stakeholders in the local community, and destination management has been set up across the entire country to coordinate the desired destination development in a more sustainable direction. The challenge of overtourism, greenhouse gas emissions and damage to nature is not unique to Norway, and

there are many similar national programs globally underway as Norway celebrates its tenth anniversary. Innovation Norway’s work is carried out in line with international frameworks for sustainable tourism. The standard for the label scheme covers the full meaning of the term ‘sustainability’ and is also linked to the UN’s Sustainable Development Goals.

Read about this and more in the brochure. We hope you enjoy reading the report!

Further information and full reports can be found on Innovation Norway’s website visitnorway.no/innsikt

Margrethe Helgebostad
Special Advisor for Tourism/Oslo



Photo: Astrid Waller/Innovation Norway.

Key Figures

	2012	2016	2019	2020	2021	2022	2023	Change over the most recent period:
Employed persons in the tourism industry								
Number of employed persons in the tourism industry	153,000	162,600	220,100	198,400	191,400	n/a	n/a	-4%
Tourist consumption in Norway by consumer group. Current prices. Figures in millions								
Total consumption	136,882	170,002	194,300	129,750	147,821	n/a	n/a	14%
Foreign tourist consumption in Norway	36,574	50,201	59,425	19,046	18,699	n/a	n/a	-2%
Norwegian domestic tourist consumption in Norway	78,008	95,463	107,570	96,036	113,989	n/a	n/a	19%
Norwegian industries' expenses for business travel in Norway	22,300	24,338	27,335	14,668	15,133	n/a	n/a	3%
The tourism industry's share of GDP		4.30%	4.2%	3%	3%	n/a	n/a	0%
Total tourism consumption (holiday and business travellers) in Norway. Figures in billions.								
Total expenditure			124,9	n/a	n/a	n/a	134,6	8%
Norwegian tourists			107,8	n/a	n/a	n/a	107,3	0%
Foreign tourists			17,1	n/a	n/a	n/a	27,3	60%
Overnight stays at commercial venues ¹								
All commercial overnight stays	29,914,832	33,114,132	35,179,554	23,720,833	27,092,046	36,127,194	37,044,492	3%
Norwegian commercial overnight stays	21,974,364	23,387,248	24,478,073	20,402,530	23,782,515	26,313,965	25,907,064	-2%
Foreign commercial overnight stays	7,940,468	9,726,884	10,701,481	3,318,303	3,309,531	9,813,229	11,137,428	13%
Overnight stays via Norwegian holiday home providers								
All overnight stays in Norway	988,467	1,062,287	924,301	959,043	657,375	1,426,642	1,558,058	9%
Overnight stays by Norwegians	283,046	297,879	156,589	463,351	479,289	1,008,503	384,817	-62%
Overnight stays by foreigners	705,421	764,408	767,712	495,692	178,086	418,139	1,173,241	181%

	2012	2016	2019	2020	2021	2022	2023	Change over the most recent period:
Overnight stays through foreign sharing platform operators Airbnb, Booking.com, Expedia Group and Tripadvisor								
All overnight stays in Norway			3,970,205	2,465,418	2,770,666	4,719,221	n/a	70%
Overnight stays by Norwegians			1,136,346	1,467,014	1,936,722	1,670,237	n/a	-14%
Overnight stays by foreigners			2,833,859	998,404	833,944	3,048,984	n/a	266%
Cruise tourism in Norway								
Number of visiting cruise passengers	588,000	658,883	944,944	20,211	41,445	1,080,768	1,523,263	41%
Norwegian holiday and leisure travel								
All holiday and leisure travel domestic and foreign	17,000,000	17,320,000		16,030,000	19,989,999	23,750,000	24,780,000	4%
Holiday and leisure travel in Norway	9,590,000	10,820,000		14,630,000	18,400,000	17,830,000	18,270,000	2%
Holiday and leisure travel abroad	7,410,000	6,530,000		1,380,000	1,590,000	5,920,000	6,510,000	10%

1 – Generic term used for overnight stays in commercial accommodation such as hotels, campsites, cabin villages, and youth hostels.

Source: Statistics Norway and Innovation Norway

02

The importance of tourism to Norway



Norway has had strong development in tourism

Here are figures from 2019, which was the last normal year Statistics Norway has published data from.



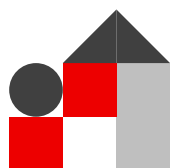
4.2% of GDP

Amounts to 126.3 billion*



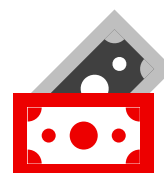
7 in 100

Jobs in the travel and tourism industry, amounting to 182,900 employees



194,330 billion

Total tourism consumption



59.4 billion

Foreign visitors' share of total tourist consumption amounts to 31%

Source: Tourism Satellite Accounts, Statistics Norway. When this brochure was finalised in mid-2024, Statistics Norway had not published data more recently than 2021.

Tourist consumption

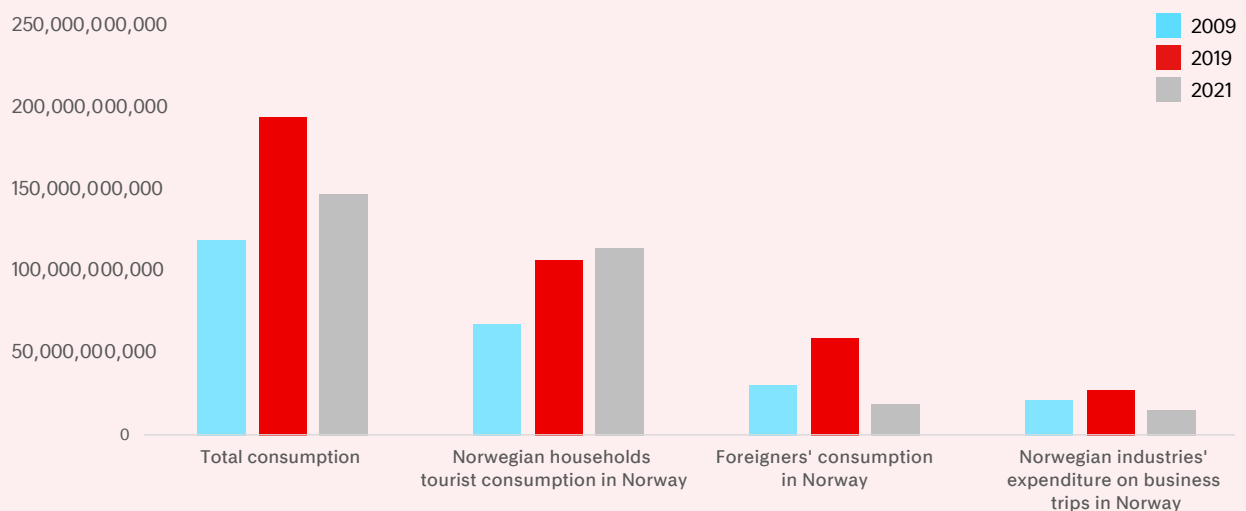
According to figures from Statistics Norway, the total tourist consumption in 2019 was calculated as being NOK 194.3 billion. Of this, NOK 126.3 billion went on the purchase of goods and services defined as tourism products, such as transport, accommodation, catering, distribution, cultural activities and entertainment.

The travel and tourism industry’s contribution to national GDP was 4.2 per cent, a share that has remained stable in recent years. This indicates that the importance of tourism to Norway is increasing in line with the rest of the Norwegian economy.

The tourism year 2021 was a year of records, both high and low. The 2021 results were clearly affected by the pandemic, with a total tourist consumption

of NOK 147.8 billion. This represents a 24 per cent drop from 2019, when tourist consumption was NOK 194.3 billion. Foreigner visitors’ share of tourist consumption was at a record low in 2021, falling from 30.6 per cent in 2019 to 12.6 per cent in 2021. At the same time, 2021 was a year where Norwegians could not make many trips abroad, something which is reflected in the figures. A total of NOK 114 billion was used on domestic holidays – a new record. Statistics Norway has never registered such high consumption since it began publishing such figures in 2007.

Distribution of total consumption

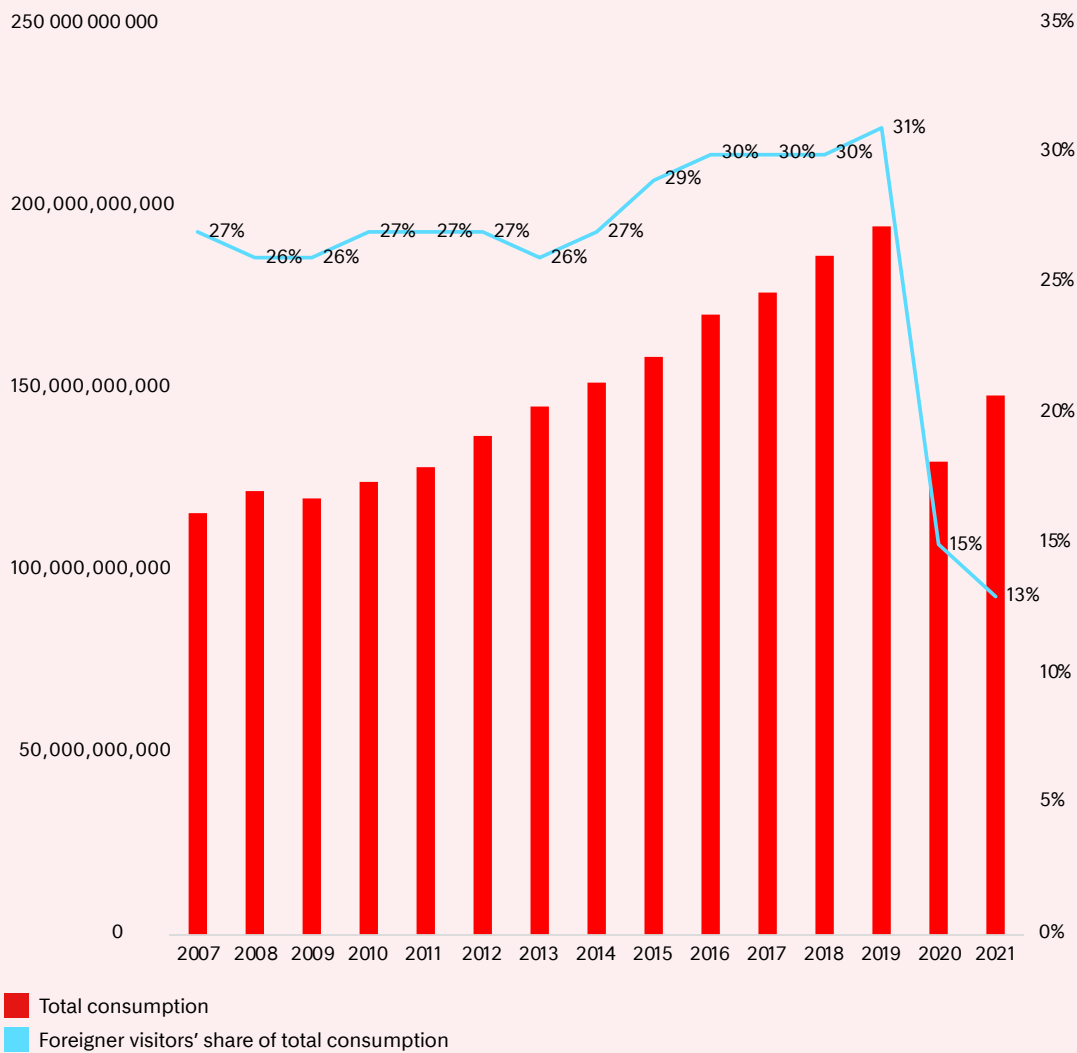


Source: Tourism Satellite Accounts, Statistics Norway

Strong growth in tourist consumption, and foreign tourists' contribution increases

Between 2007 and 2019 tourist consumption increased from NOK 115.5 billion to NOK 176.3 billion. This 68 per cent increase corresponds to around NOK 79 billion. At the same time that general growth has been good, growth from foreign tourists has been even greater than that of Norwegians. This

means that foreign tourists' share of tourist consumption has increased from 27 per cent in 2007 to 31 per cent in 2019. This share fell significantly during the pandemic and was down at 13 per cent in 2021.



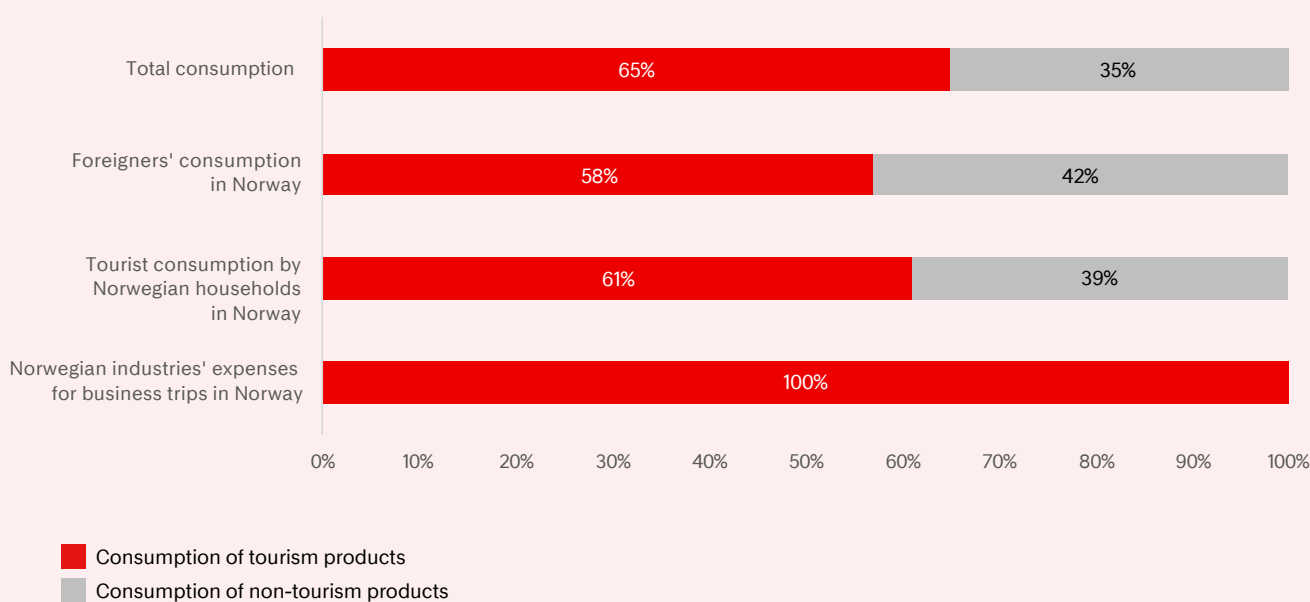
Source: Tourism Satellite Accounts, Statistics Norway

The majority of tourism consumption went to the tourism industry, but a significant proportion also went to other industries

Even though 65 per cent of the total tourist consumption of NOK 194.3 billion went to tourism products, purchases of goods and services from other industries made up 35 per cent, or NOK 68 billion, of this.

Of the total tourist consumption of NOK 194.3 billion, NOK 126.3 billion went to tourism products such as transport, accommodation, catering, distribution, cultural activities and entertainment. If we examine

the different aspects of the tourism industry, air transport made up the largest contribution at NOK 34 billion. This is followed by catering services with just under NOK 26 billion, accommodation with NOK 20.3 billion and travel agency and tour operator services with just under NOK 20 billion. The chart below shows how consumption is distributed between Norwegian and foreign tourists.

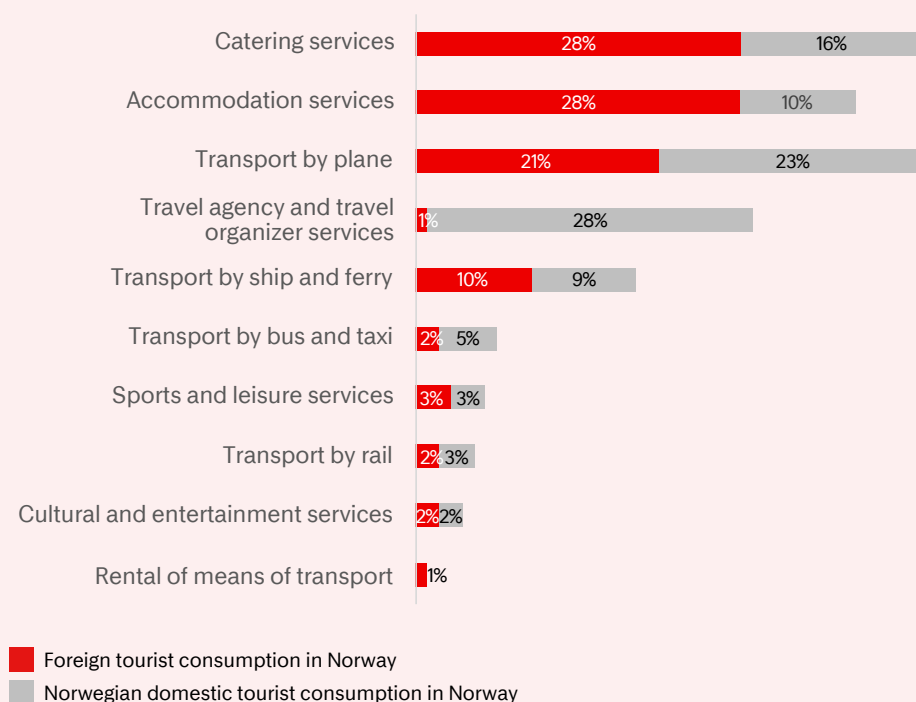


Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

Distribution of tourist expenditure 2019

43 per cent of total tourist expenditure was spent on various transport services. 21 per cent went to hospitality and 16 per cent to accommodation.

The graph is sorted by highest total consumption



Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

7 in 100 people work in the tourism industries

In 2019, there were 182,900 employees in the travel and tourism industry, which is a two per cent increase from the previous year. The share of employees in the tourism industry constituted 7.4 per cent of all employment in Norway, meaning that seven in every 100 employees in Norway works in the tourism industry. Most of these, 31 per cent, are employed in hospitality businesses. This is followed at 28 per cent by the transport sector, which includes buses, trams, taxis, boats, ferries, airplanes and other forms of transport. Accommodation establishments employ 14 per cent.

Decrease during the pandemic

During the pandemic, the share of employment in the tourism industry fell from 7.4 per cent to 6.6 per

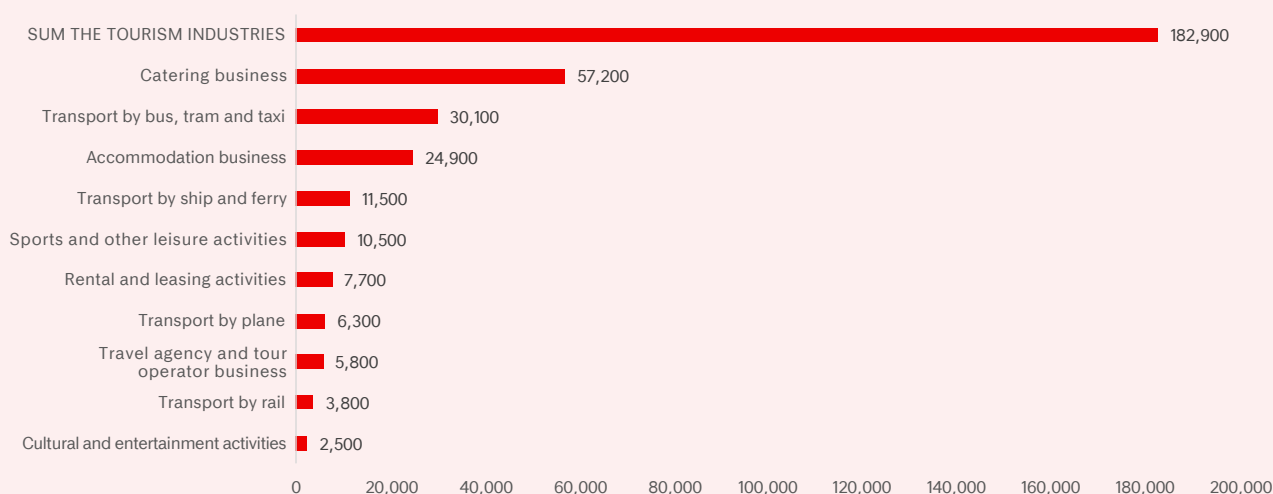
cent of all employment in the country. In 2021, there were 162,000 full-time equivalents (FTEs) related to the tourism industry, a decrease of 3,600 the previous year and almost 21,000 fewer than in 2019.

At the same time, the number of FTEs on mainland Norway increased by 1.5 per cent, something which shows that the tourism industry was losing ground.

The tourism industry normally has more employed persons than FTEs. This was also the case in 2021, even though the decrease in the number of employed persons was 3.5 per cent. In 2021, there were 191,400 people connected to the tourism industry, 7,000 fewer than in 2020.

182,900 people were employed in the tourism industry in 2019

Distribution of the number of employees in the industry



Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

03

International tourism and Norway's market share



Global tourism on the road to recovery

International tourism experienced a significant upturn in 2023, with 1.28 billion cross-border journeys with at least one overnight stay. This represents an increase of 34 per cent from 2022, though the number of arrivals is still 12 per cent below 2019 levels. There is variation between the various parts of the world, and inbound travel to European countries is six per cent below 2019 levels.

2020 was the worst year for international tourism with only 400 million cross-border journeys involving one night or more. This figure increased to 415 million trips in 2021. After ten years of continuous growth and a promising start to 2020, all global travel came to an abrupt halt. From 1.5 billion cross-border journeys in 2019, the number of journeys decreased by 73 per cent in 2020, resulting in the worst ever

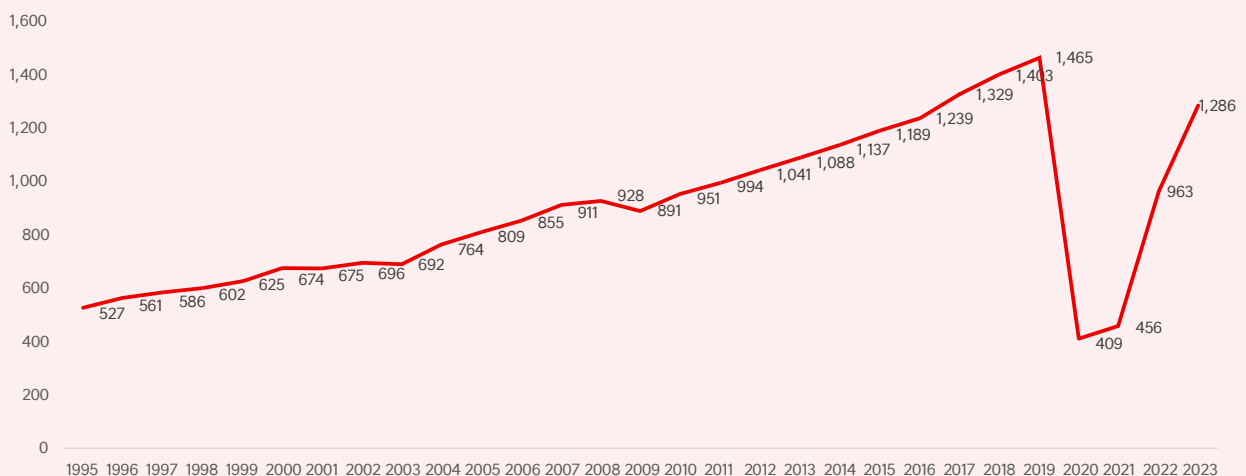
year for international tourism. Travel and tourism grew somewhat in 2021, increasing four per cent on the previous year, but the number of cross-border journeys was still 72 per cent below 2019 levels.

More holidays at home

A strong increase in domestic travel has helped tourism in many countries, including Norway. Statistics Norway’s Travel Survey shows that 2021 was a record year featuring the highest number of holiday trips made in Norway by Norwegians. Results from 2023 show that Norwegians made fewer domestic holiday trips compared to the record year of 2021, but still far more than in 2019. Read more in Chapter 8 about Norwegians’ holiday habits.

International tourist arrivals involving at least one overnight stay

Figures in millions



Source: UN World Tourism Organization (UNWTO)

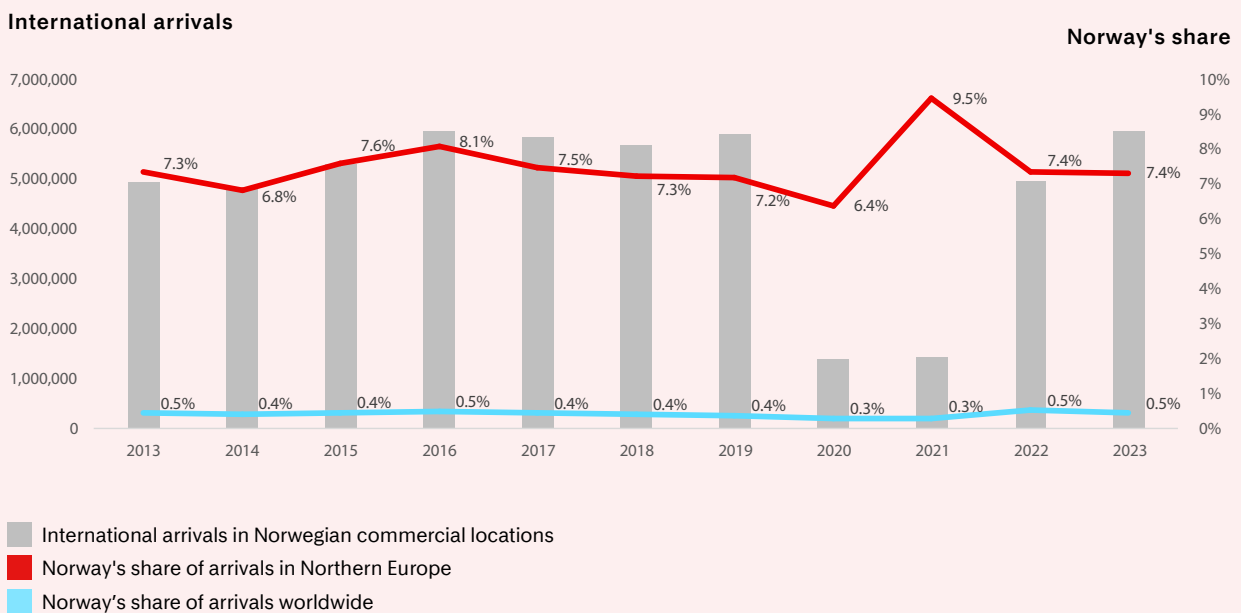
Norway has 0.5 per cent of all arrivals in the world

Norway’s share of international arrivals is 0.5 per cent, a share that has remained relatively stable over time. Up until the pandemic, world tourism has experienced eleven years of continuous growth, and arrivals to Norway had followed this trend. Norway’s share of arrivals to Northern Europe has had a corresponding development, and we have kept pace with other countries. Over time, Norway’s share of arrivals to Northern Europe has sat at 7.4 per

cent. In 2016, this share was up at 8.1 per cent, and in 2021, it was abnormally high, but this was due to the limited travel opportunities that year.

While Norway’s share of land-based tourism was at 0.5 per cent in 2023, our share of international cruise traffic increased to 4.8 per cent in 2023. For more information on cruise traffic in Norway, see the chapter on said topic.

Foreign arrivals at commercial locations and Norway’s market share in Northern Europe and the world



Source: Cross-border travel with a minimum of one overnight stay
UN World Tourism Organization (UNWTO) and Statistics Norway.



Tourism is defined as all activities that people participate in outside their normal place of residence, irrespective of purpose.

This means that tourism includes all travel, including holiday and business travel.

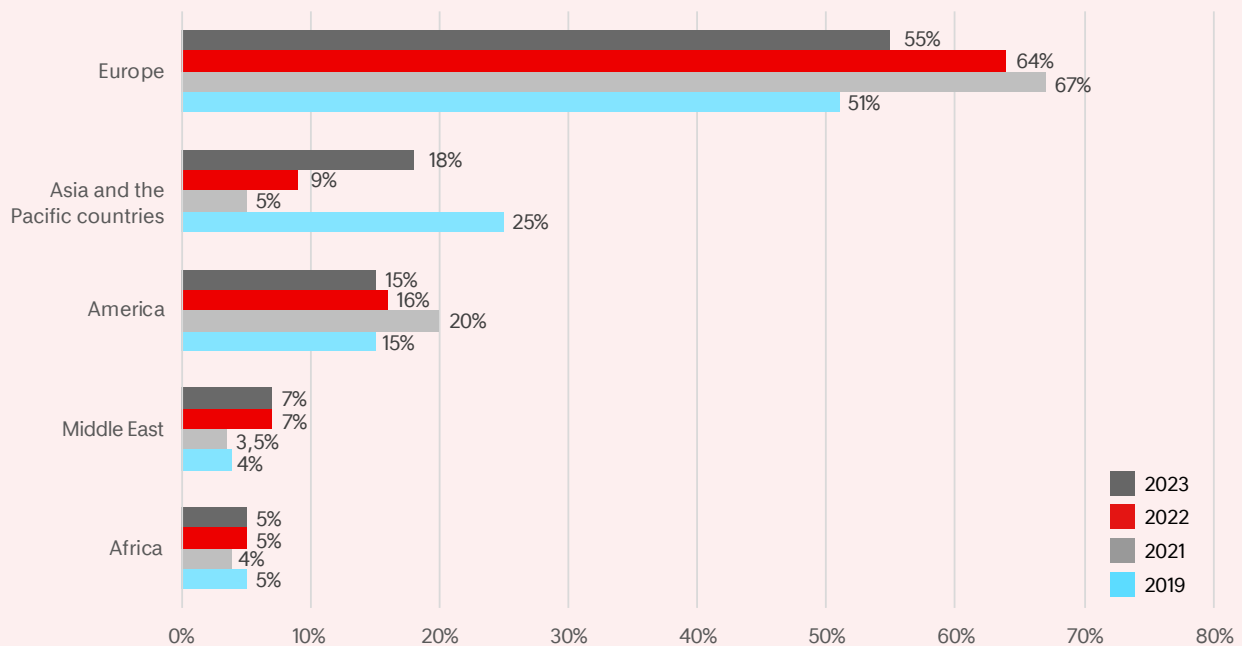


Europe is the most visited

In 2023, arrivals to European countries constituted 55 per cent of all international arrivals. Europe has historically been most visited destination in the world, but this share has varied over time. In 1980, this share was 63 per cent, while in 2019 it had fallen to 51 per cent. The increase in 2023 can partially be explained by the fact that arrivals to Asia and the Pacific region have still not fully recovered to pre-pandemic levels, while many are travelling less than they did before 2019.

over half of all international arrivals. The pandemic hit the world hard in March 2020, but resumption of travel has varied depending on countries’ vaccination rollout and management of inbound restrictions. Three years later, world tourism is still 12 per cent below pre-pandemic levels. The Middle East has had the fastest resumption in travel, with 22 per cent more international arrivals in 2023 compared to 2019. In contrast, Asia and the Pacific region, which was the hardest hit during the pandemic, has had the slowest resumption.

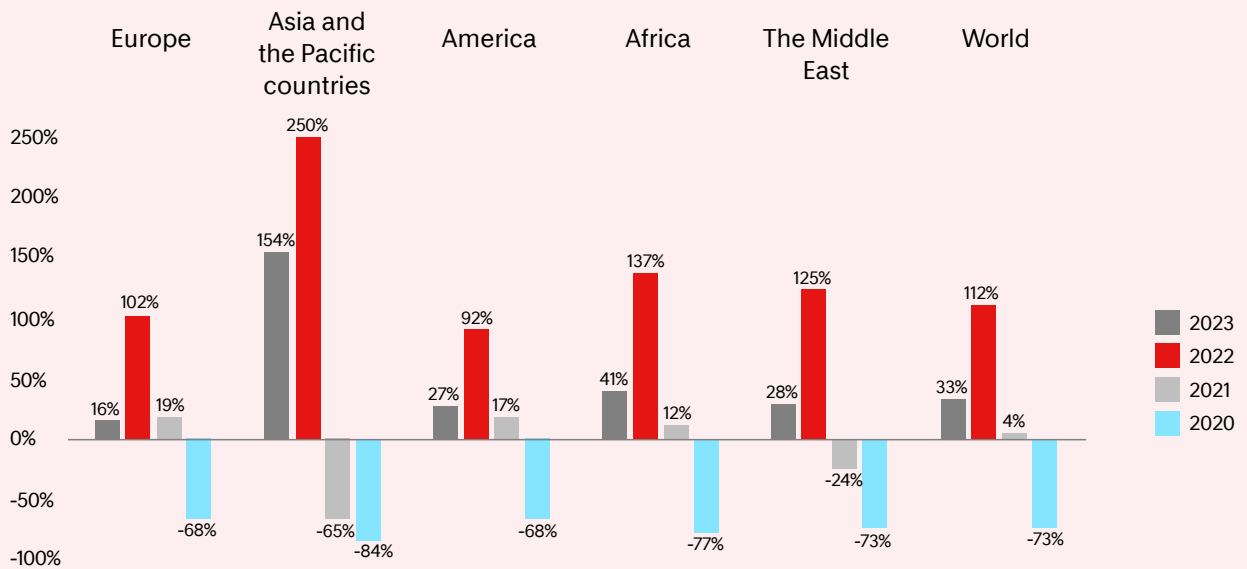
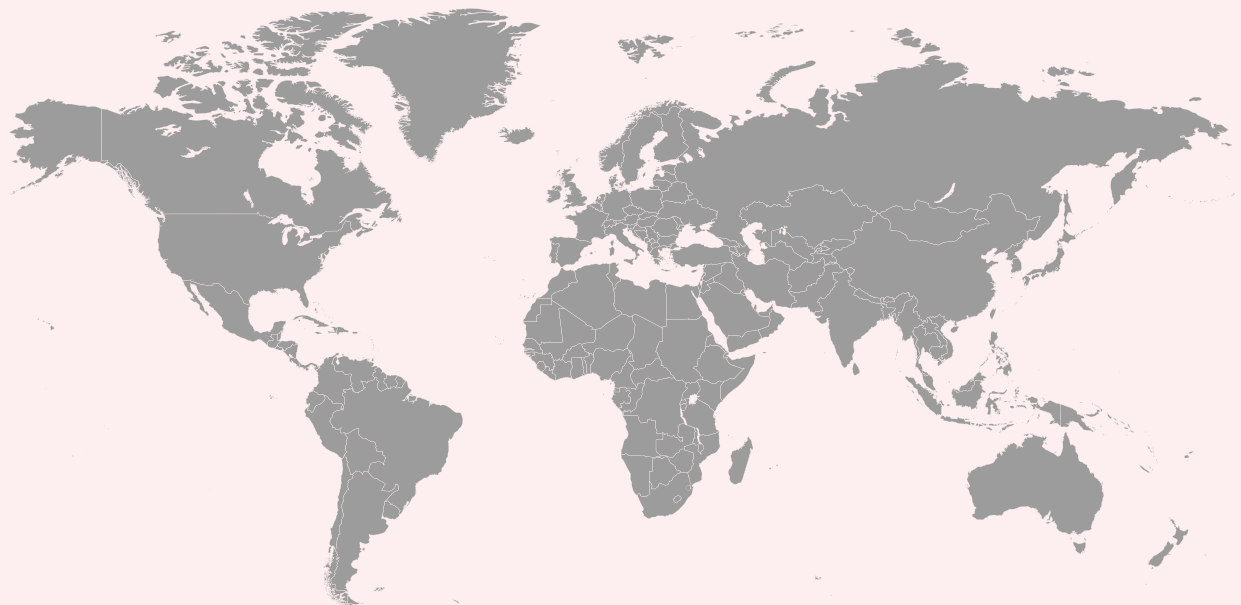
Despite the global impact of the impact, Europe is still the most visited destination in the world with



Source: UN World Tourism Organization (UNWTO)

Changes in the number of tourist arrivals globally

Tourist arrivals with at least one overnight stay

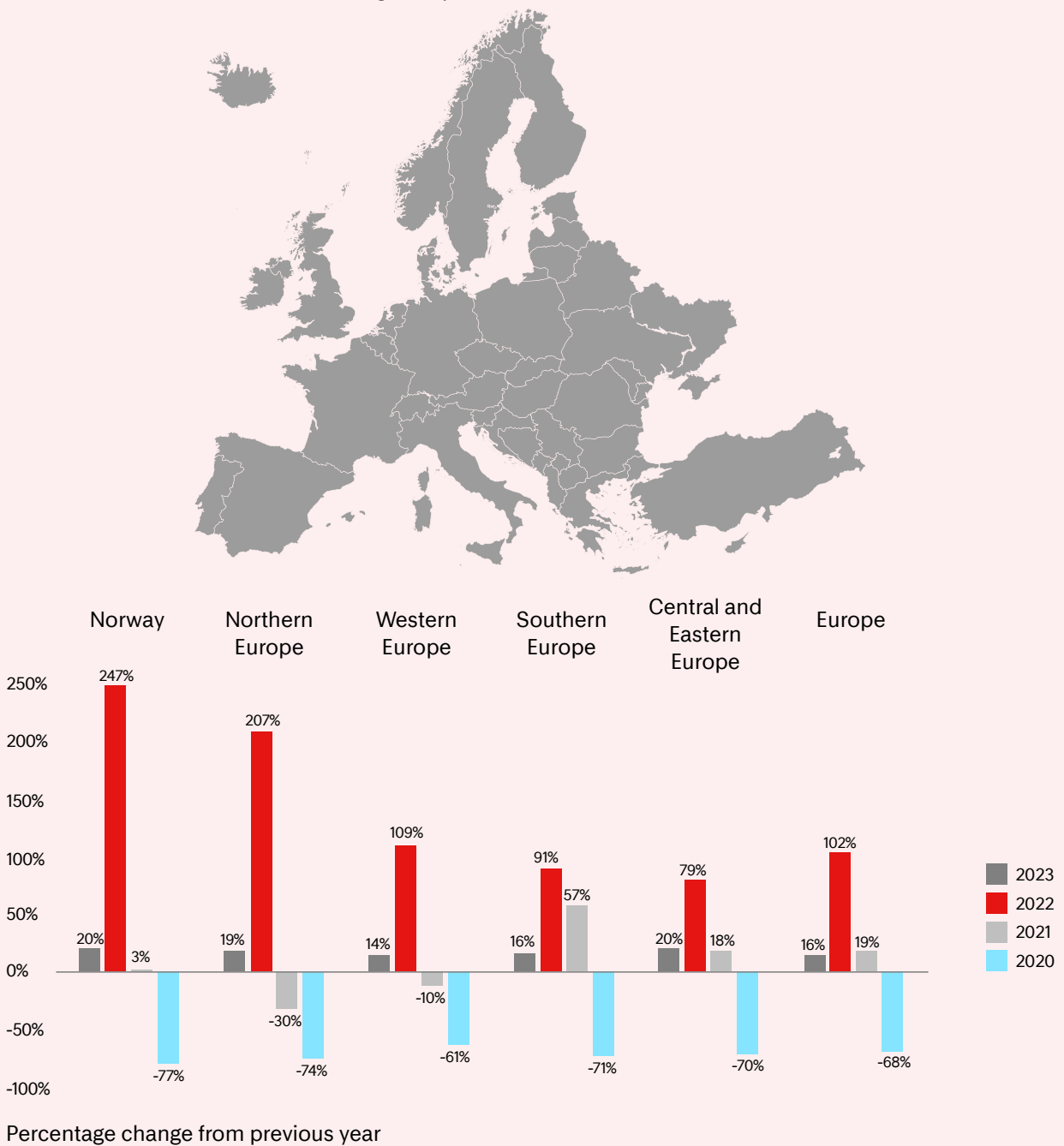


Percentage change from previous year

Source: UN World Tourism Organization (UNWTO)

Changes in the number of tourist arrivals in Europe and Norway

Tourist arrivals with at least one overnight stay



Source: UN World Tourism Organization (UNWTO) and Statistics Norway

Reduced number of trips abroad

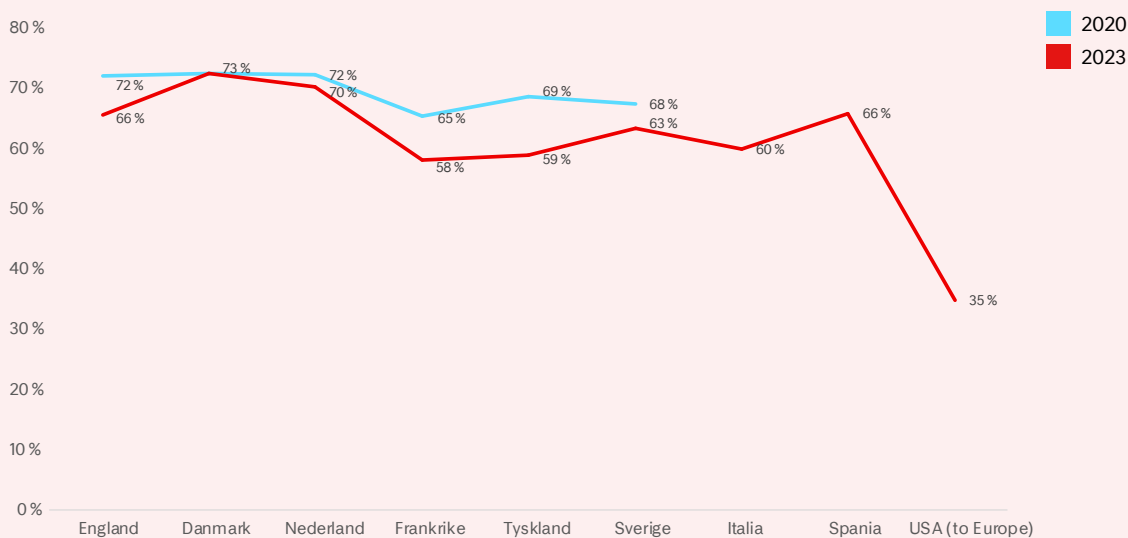
On the previous pages, we saw that global tourism in 2023 was still not back at 2019 levels. Many report that it is primarily holiday traffic that has contributed to growth. We have seen a similar trend in Norway after the pandemic: course and conference traffic, as well as business travel have still not returned to their previous levels. This is discussed further in Chapter 5.

Fewer trips abroad as well

We can see the same trend through Innovation Norway’s Travel Barometer, which is carried out across six markets. In the December 2023 survey, only Danes travelled abroad as much as they did before the pandemic. The survey paints a good picture of how large a proportion of the population of Sweden, Denmark, the United Kingdom, Germany, the Netherlands and France actually go on holiday

abroad. We call these people “active travellers”. These are people who have been on holiday abroad in the past three years and who are interested in holidaying abroad in the next three years. In Denmark, 73 per cent of the population fulfil these criteria, which is the same level as before the pandemic. On the opposite end we have Germany, where the share has decreased from 69 per cent at the start of 2020 to 59 per cent now. New to this year is that we also have data from Spain and Italy, which shows that 66 per cent and 60 per cent of the population of these countries, respectively, have travelled and plan to take a holiday abroad. In the US, we do not just measure interest in travelling abroad, but also holidays to Europe. For this, 35 per cent responded that they had both been on holiday to Europe in the past three years and are interested in returning over the course of the next three.

The target group* is still less than before the pandemic



*By target group we are referring to the share of active travellers in the population who have both been on holiday abroad in the last three years and are interested in going on holiday abroad in the next three years. This survey was carried out for the first time in Italy, Spain and the US in 2023.

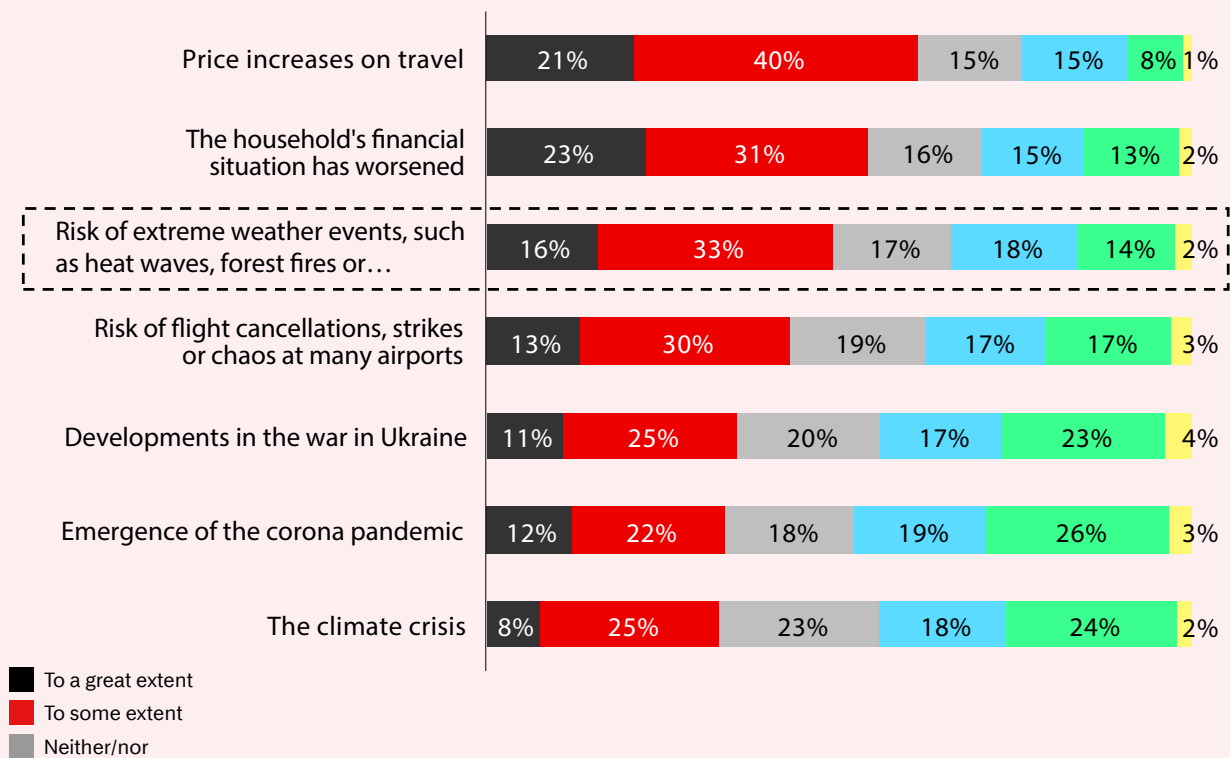
Source: Travel Barometer and Segmentation Survey, Innovation Norway

How surroundings affect travel plans

Eight out of ten respondents state that unpredictability, price rises, extreme weather, war, COVID-19 and/ or the climate crisis affect their travel plans. Price rises for travel and a demanding economic situation means that many are looking for cheaper travel and destinations. The risk of extreme weather events affects the travel plans of half of all travellers. This is especially true for Swedes, Danes and Brits, who take weather conditions into consideration when travelling.

45 per cent respond that one of the factors in the graph below will influence their travel choices “to a large extent” in the next 12 months. Extreme weather affects the travel choices of about half of travellers. Women, young people and families with children are those most affected, and it is also these groups who are most concerned about sustainability.

To what extent do you expect the following to influence your holiday plans in the next 12 months? Proportion of those interested in travelling abroad in the next three years. Average across the six markets.



Source: Travel Barometer, Innovation Norway

04

Tourism Year 2023



Tourists' overnight stays and expenditure

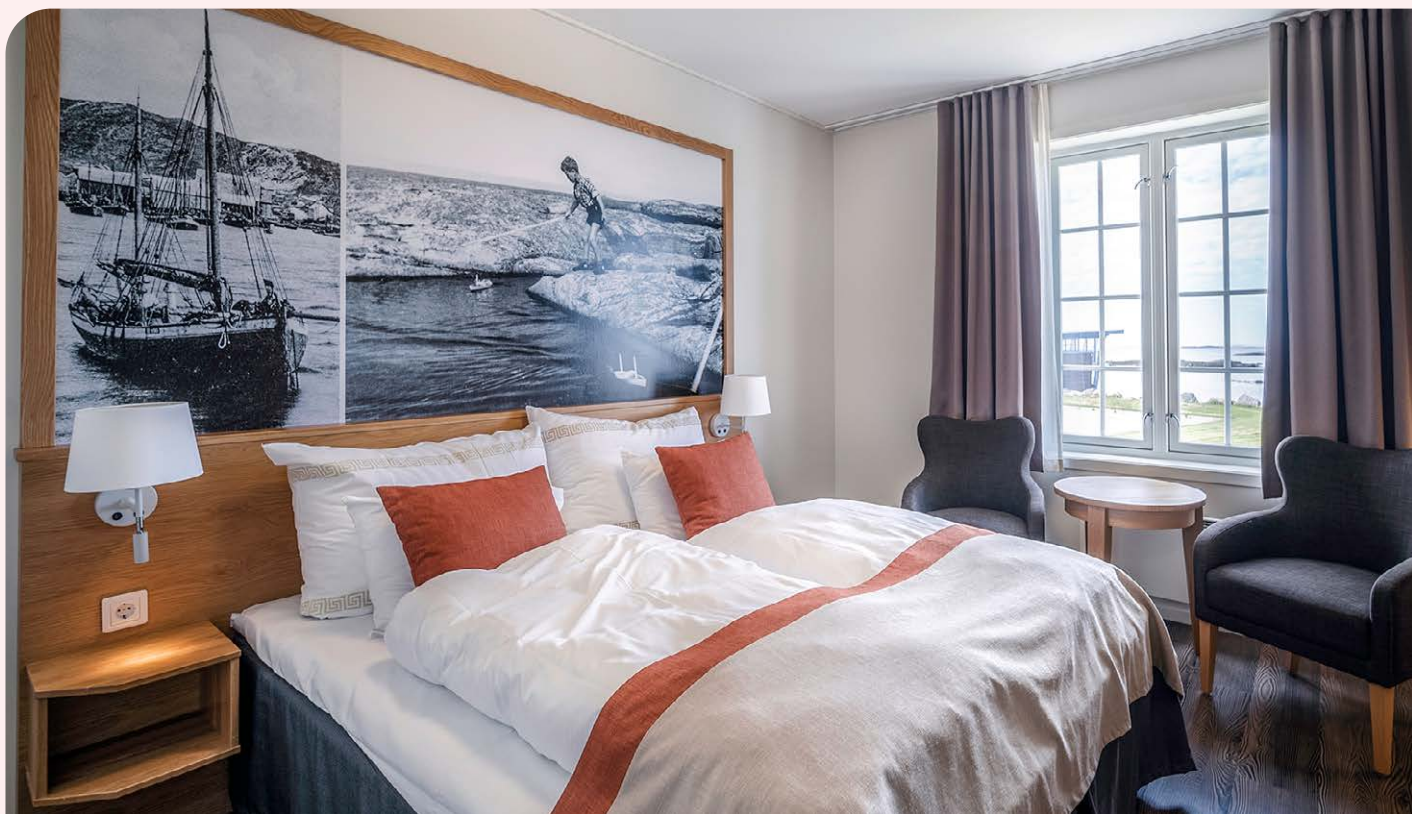
As previously mentioned, tourism includes all activities that people participate in outside their normal place of residence, irrespective of purpose. This includes both holiday and business travel.

On the following pages, we present an overview of the number of overnight stays and expenditure in Norway, divided between holiday and business travel. After this, the holidaymakers' expenditure is analysed more closely, focussing on where expenditure is going as well as the various markets' economic contribution to the country.

The data were gathered from the Tourism Survey, a sample survey that also includes overnight stays with friends and acquaintances, in personal or

rented cabins or in RVs outside of campsites. These are overnight stays that are not included in the official statistics from Statistics Norway, which only includes accommodation types such as hotels, campsites, hostels, holiday cabins and renting via Norwegian holiday home providers.

Even though the majority of overnight stays in Norway are recorded in these statistics, there are increasingly more overnight stays that fall outside of them. The last part of this chapter focuses on overnight stays registered by Statistics Norway, including commercial accommodation (hotels, campsites, holiday cabins and hostels) and overnight stays with holiday home providers.



Total volume and expenditure of travellers visiting Norway in 2023

A significant share of overnight stays and expenditure in 2023 can be ascribed to Norwegians. Over the course of 2023, 100.1 million overnight stays were registered in Norway, which led to a total expenditure of NOK 134.6 billion. Norwegians accounted for 82 per cent of overnight stays and 80 per cent of expenditure, of which the majority of overnight stays

were related to holiday tourism.

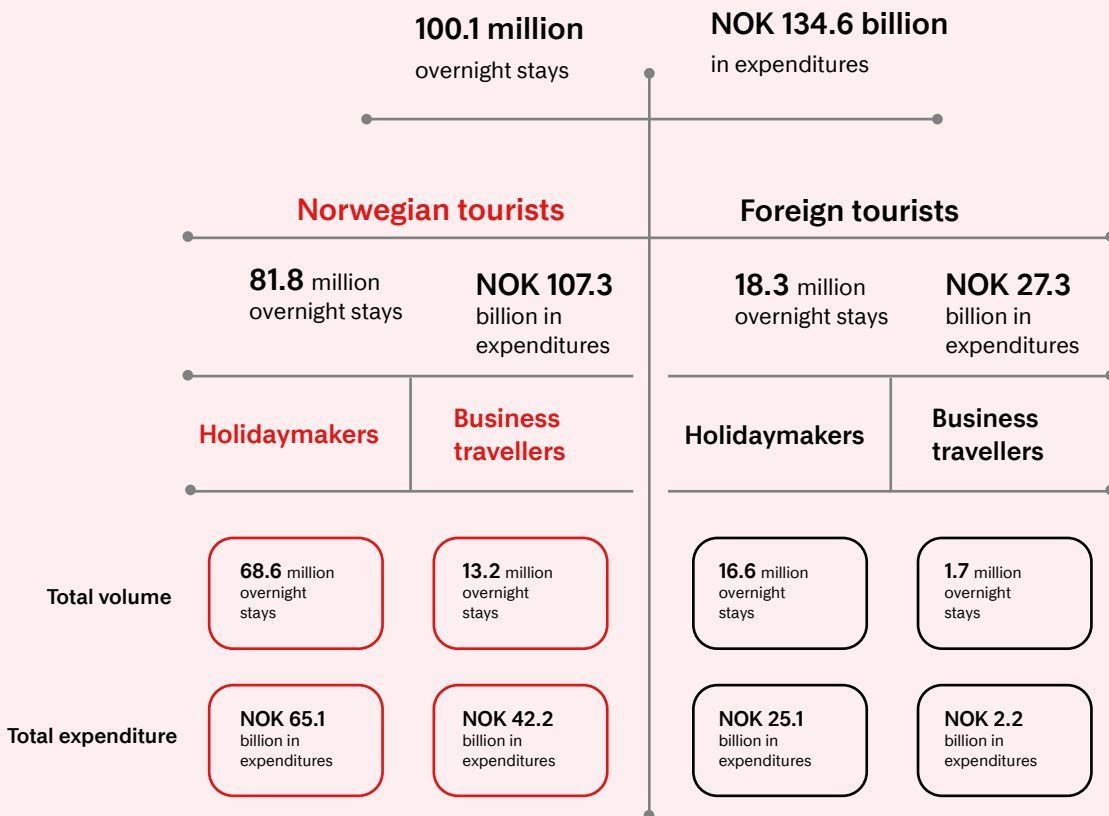
This also means that foreign travellers had a higher expenditure per overnight stay (daily expenditure) than Norwegian travellers. Foreign holidaymakers had a daily expenditure of NOK 1,510, compared to NOK 950 for Norwegian holidaymakers.

Daily expenditure:

The average number of that tourists in Norway spend per night in NOK.

Overnight stays:

The number of overnight stays in Norway in the expenditure model is based on Statistics Norway's Accommodation Statistics, the Norwegian Travel Habit Survey (RVU) and the Tourism Survey (2023).



Source: The 2023 Tourism Survey, Innovation Norway

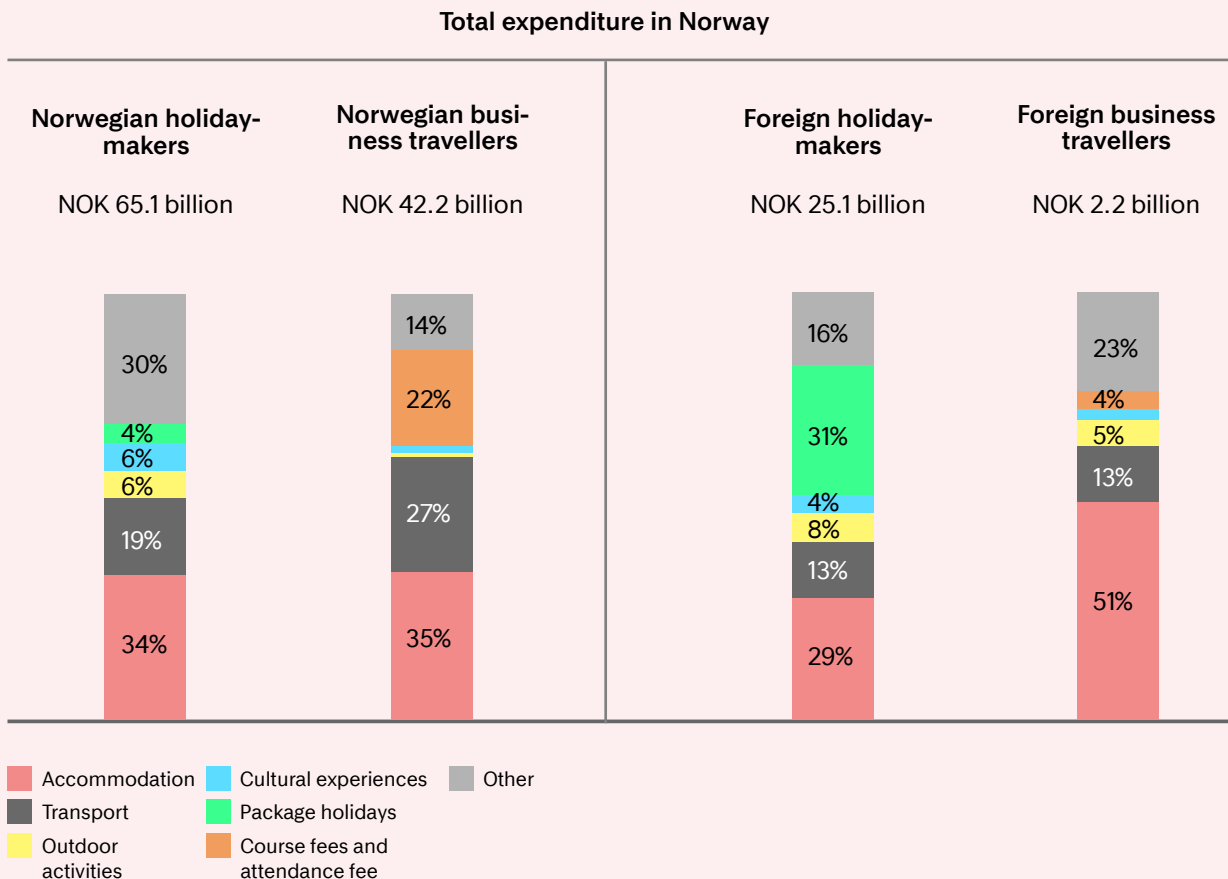
More overnight stays by foreigners leading to a greater total expenditure

Total expenditure for foreign holidaymakers is higher due to a greater number of overnight stays by foreigners. For Norwegian holidaymakers, total expenditure comes primarily from overnight stays, followed by transport, when discounting other expenditure items. Package holidays constitute a considerably larger portion of total expenditure for foreign holidaymakers compared to Norwegians. At the same time, Norwegian holidaymakers spend more on accommodation than foreign holiday-makers. This may be related to the fact that a larger

proportion of Norwegian holidaymakers stay at hotels. Since the pandemic, Norway has seen a large increase in camping and self-catered accommodation. The number of foreign overnight stays in hotels in 2023 was still below 2019 levels.

Norwegian business travellers spend more on course fees in Norway than foreign business travellers, while foreign business travellers spend more on accommodation.

Distribution of expenditures per type of traveller 2023



Source: The 2023 Tourism Survey, Innovation Norway

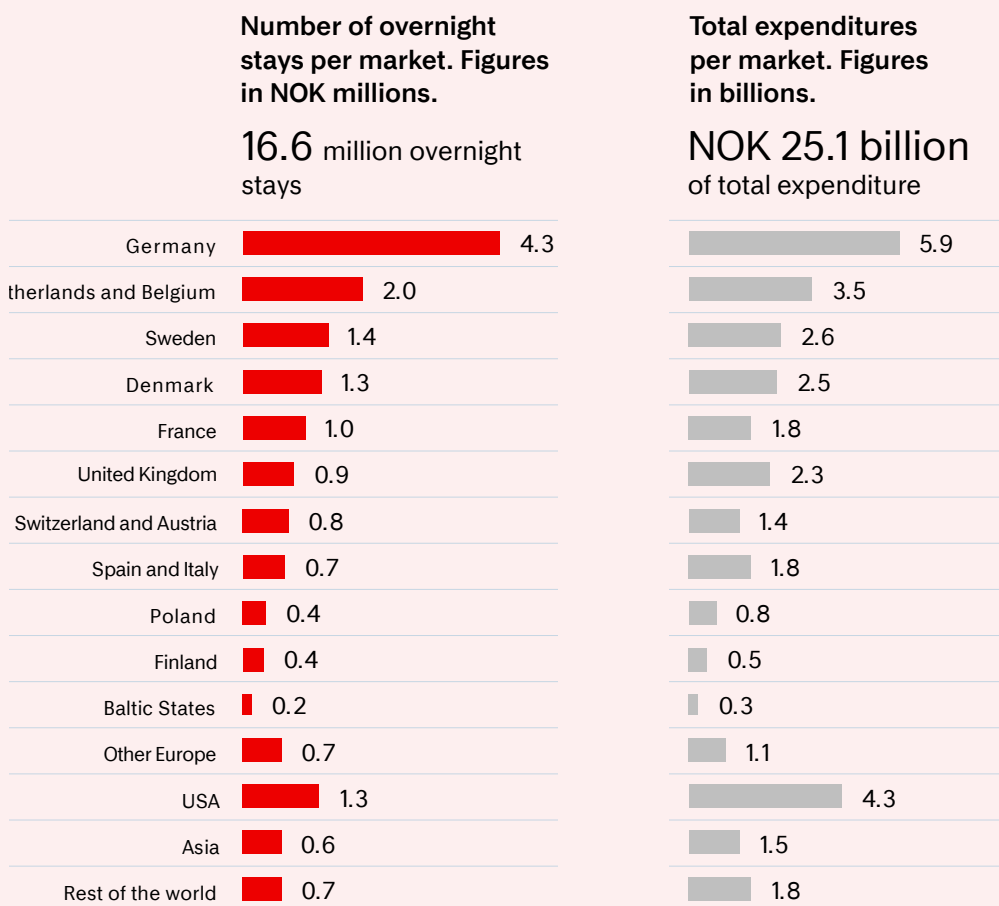
Foreign holidaymakers – number of overnight stays and expenditures

There is great variation in both the number of overnight stays and expenditure among foreign holidaymakers. As the graph below shows, there are major variations in both the number of overnight stays and expenditures between the different foreign holiday markets. We can see that if a market has more overnight stays in Norway, then the economic contribution from this market is large, even if the individual holidaymakers do not have a high average daily expenditure.

of this, with 4.3 million overnight stays and total expenditures of NOK 5.9 billion. Even though they do not have the highest daily expenditure, this is made up for by Germans staying in the country for longer and in larger numbers.

However, some foreign markets stand out, such as holidaymakers from the US, UK, Spain and Italy. These markets have higher total expenditures compared to other markets with an equivalent volume of overnight stays due to their higher average daily expenditure.

Holidaymakers from Germany are a good example



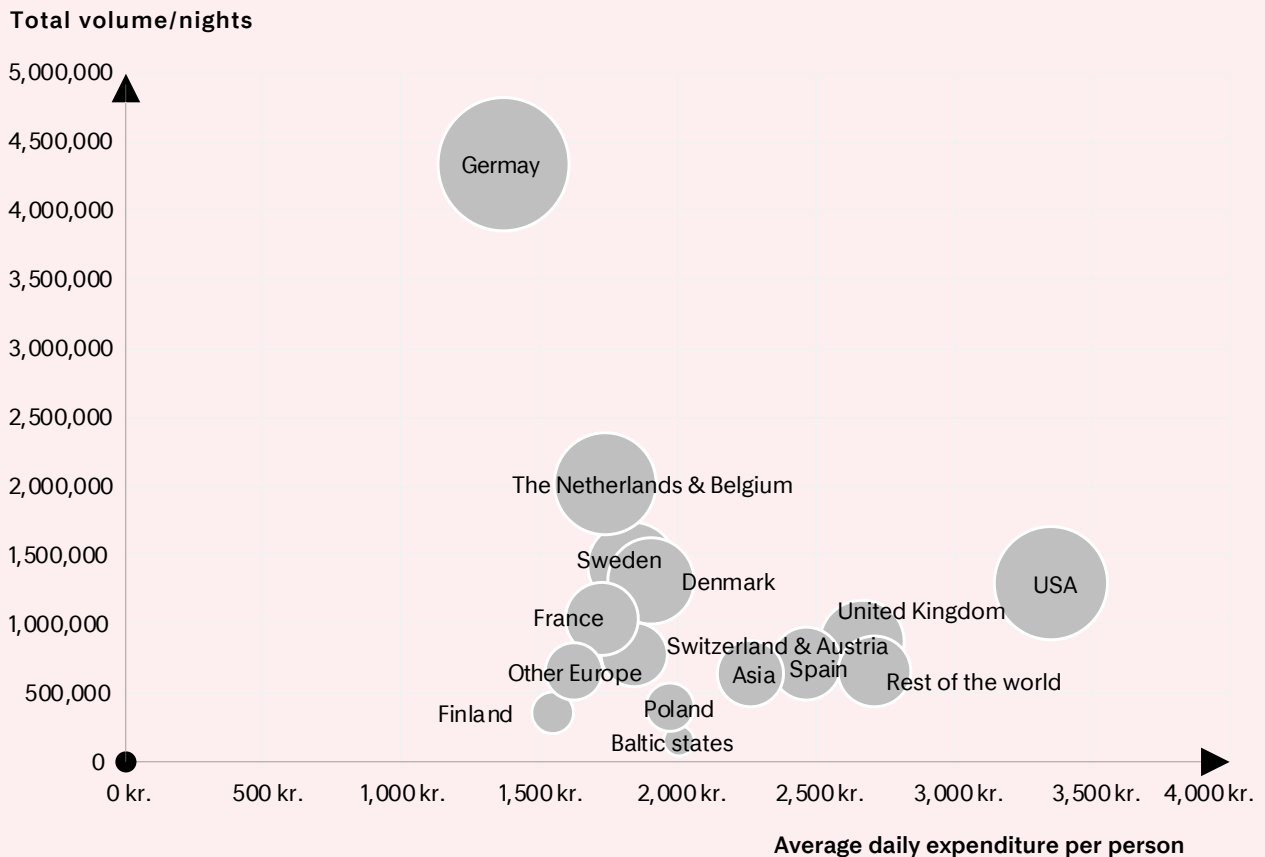
Source: The 2023 Tourism Survey, Innovation Norway

The economic contribution of the foreign holiday markets

The graph below show total expenditures of the various foreign holiday markets. The total expenditure is calculated based on the total number of overnight stays per market and the average daily expenditure per person. Germany once again takes the number one spot and continues to be one of the most important markets for Norway measured by economic contribution. This is primarily due to the high number of overnight stays throughout 2023. The average daily expenditure of German tourists is not as high as Americans.

The US is another important market, but the economic contribution comes primarily from a high per person daily expenditure, despite fewer overnight stays by Americans in Norway compared to Germans. This is not immediately obvious when looking at commercial overnight stay figures from Statistics Norway. A larger number of German holidaymakers come to Norway by campervan and stay at locations that are not obliged to send data to Statistics Norway.

The size of the circle shows the market's total expenditures in Norway



Source: The 2023 Tourism Survey, Innovation Norway

More expensive accommodation increases total expenditures

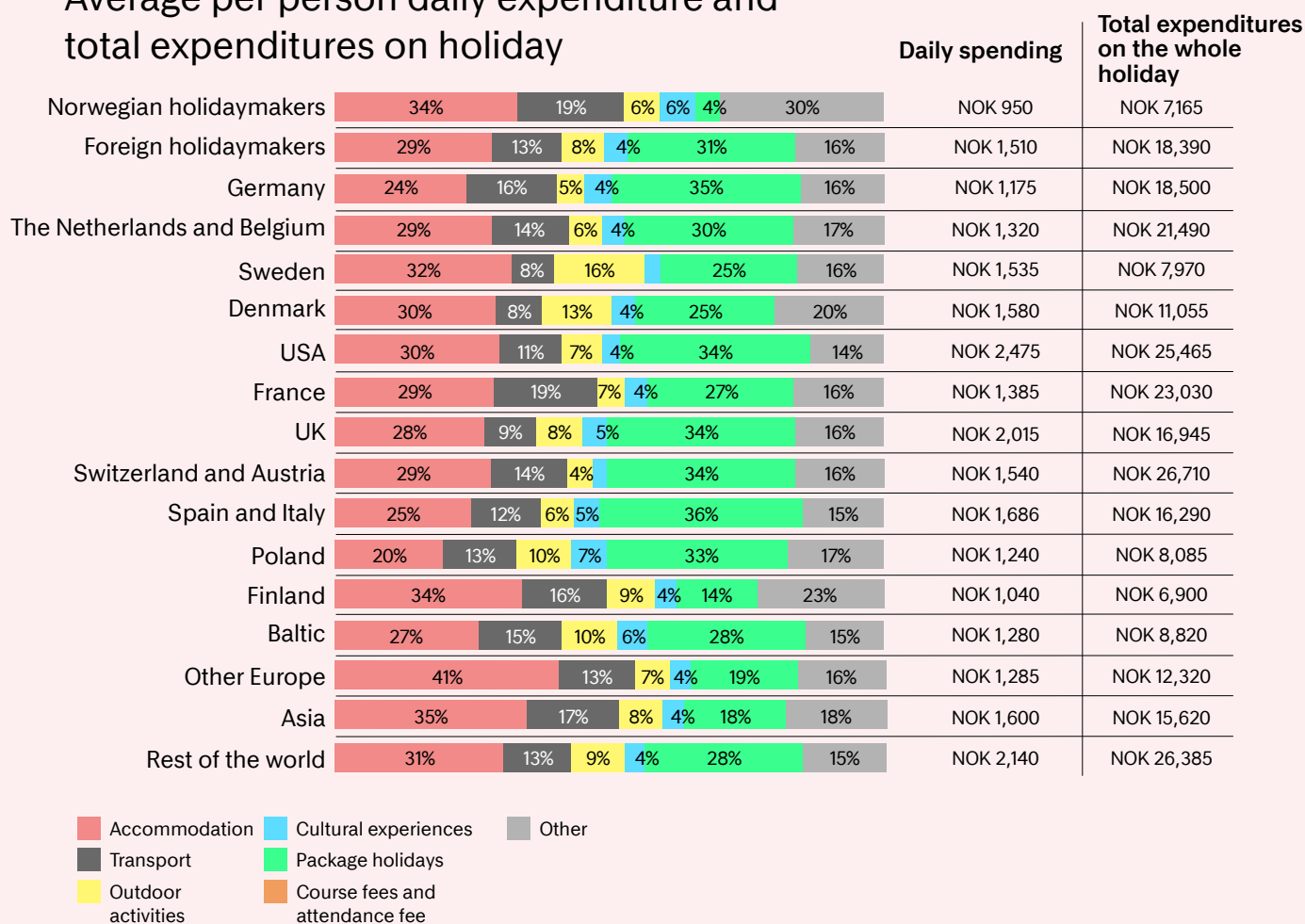
What differentiates holidaymakers in Norway from one another is how much they spend on accommodation. Holidaymakers staying at hotels, especially expensive hotels, have a higher daily expenditure than others.

that Norwegians spent far less money on package holidays, and a larger amount of their expenditures went on accommodation and a category we call "other", which includes expenditures beyond the main categories shown below.

The graph below shows the distribution of how holidaymakers from different markets spent their money while on holiday in Norway. The largest share of expenditures by foreign travellers went on package holidays and accommodation. Norwegian tourists' expenditure habits differ from foreign travellers' in

The markets that spent the most money on their holiday are holidaymakers from the US and the UK. The expenditure items that generally had a lower spend are cultural experiences and outdoor activities.

Average per person daily expenditure and total expenditures on holiday



Source: The 2023 Tourism Survey, Innovation Norway

A weakened exchange rate

Development of the Competition Price Index and number of foreign overnight stays go closely together. In recent years, the Norwegian Krone has been relatively weak against the Euro, Sterling, US Dollar, Danish Krone, and Swedish Krona. This has been beneficial to the tourism industry as an export industry.

Norway's ability to compete can be measured using the Competition Price Index. An increase on this index indicates a weak Krone, which makes Norway more competitive, and vice versa. The weaker the Krone exchange rate, the more competitive Norway becomes.

Norway's Competitiveness Strengthened Since 2019

The Norwegian krone has weakened significantly in recent years, making it more affordable for foreign tourists to get more value for their money during their holidays in Norway. In 2019, the competitiveness index was at 114, while in 2023, it had increased to 129. This is a growth of 13 percent.



Source: Norges Bank and Statistics Norway

Different types of overnight stays

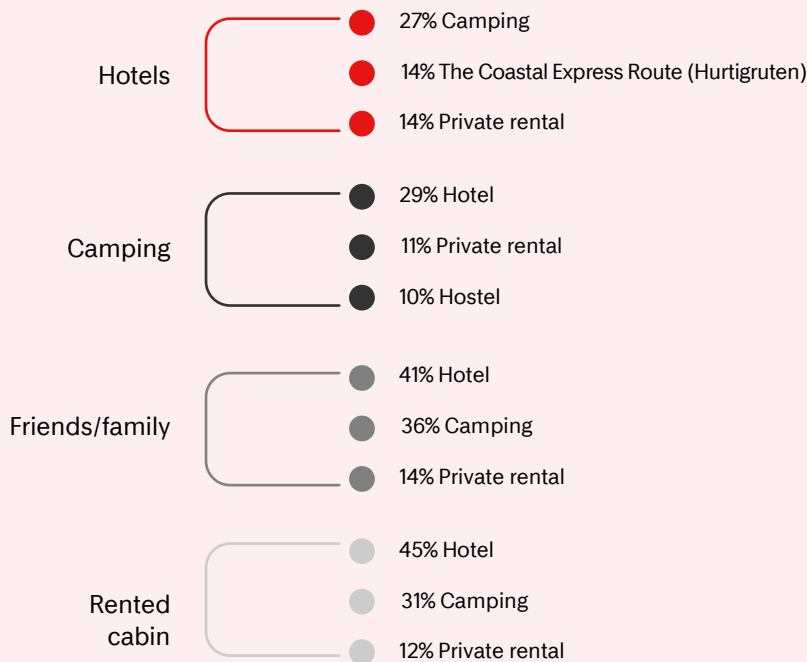
Tourists do not necessarily stick to one type of accommodation during holidays in Norway. Many combine different types of accommodation, as illustrated below. For example, slightly over 40 per cent of foreign holidaymakers who stayed with friends and family also had overnight stays in hotels. Similarly, 45 per cent of those who use private

rentals also had overnight stays in hotels. Choice of accommodation type is therefore synonymous with choosing a single accommodation type, which may be due to the large number of round trips taken by foreigners.

Combination of several types of accommodation for holidays in Norway

Have had at least one overnight stay at:

Share who have also stayed at:



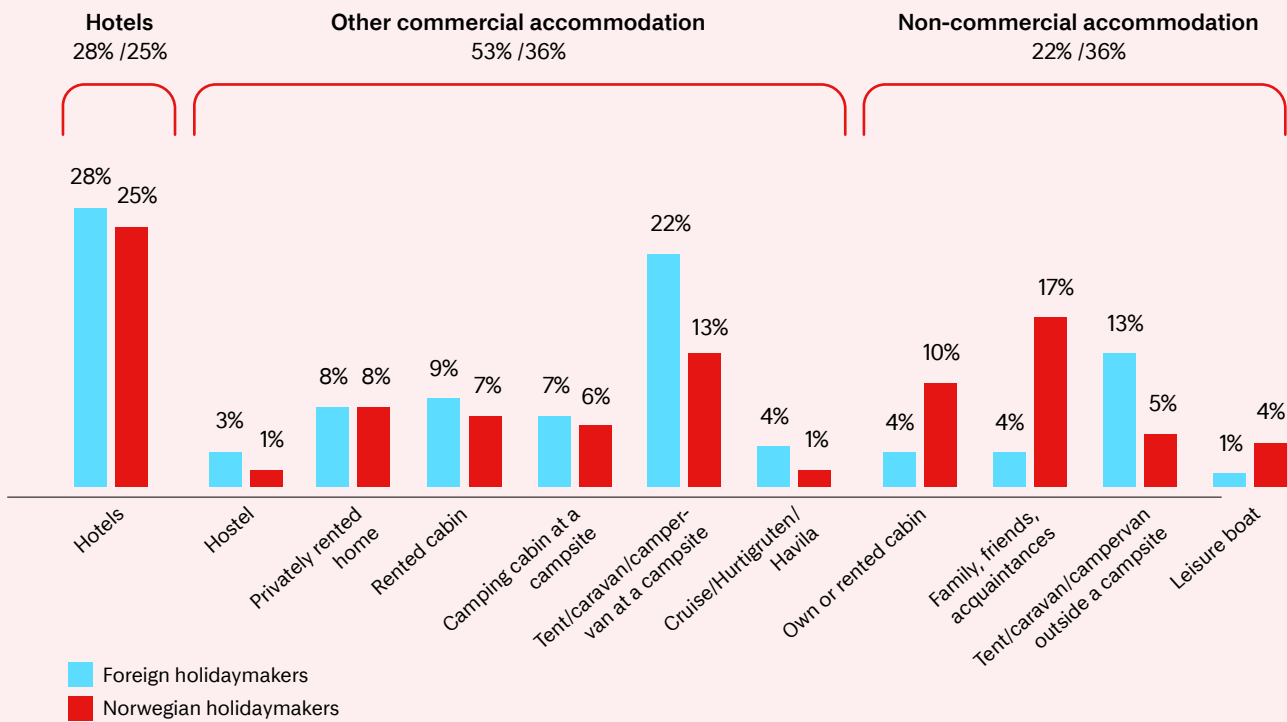
Source: The 2023 Tourism Survey, Innovation Norway



More choosing to stay at campsites

The number of overnight stays at hotels is lower than in 2019, and Norway has seen good growth in self-catered accommodation, such as cabins and camping. Overnight stays at “non-commercial accommodation”, which are not included in Statistics Norway’s figures for overnight stays, are also included.

Distribution of holidaymakers overnight stays by accommodation type



At Cruise/Hurtigruten/Havila. These figures do not contain all overnight stays on cruises in Norway shown on page 70.

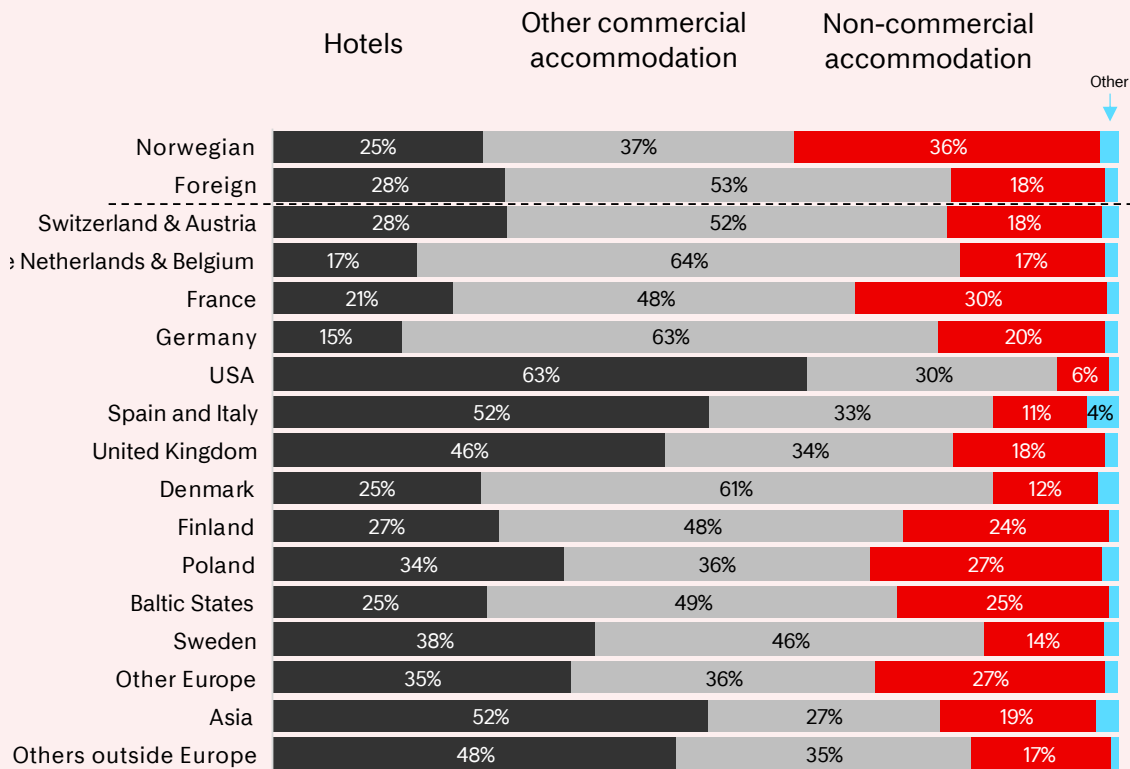
Source: The 2023 Tourism Survey, Innovation Norway

More foreign holidaymakers choosing non-commercial accommodation

Even though hotels and other commercial accommodation remain the most popular choice for both Norwegians and foreigner travellers, we are seeing an increase in the number of foreign travellers choosing non-commercial accommodation. This may be related to a greater trend in Europe, with more choosing holidays in campervans than previously.

At the same time, there are some markets, such as the US, Spain and Italy, where hotels and other commercial accommodation still dominate. There are still more Norwegian holidaymakers using non-commercial accommodation compared to foreign holidaymakers.

Distribution of holiday accommodation per market

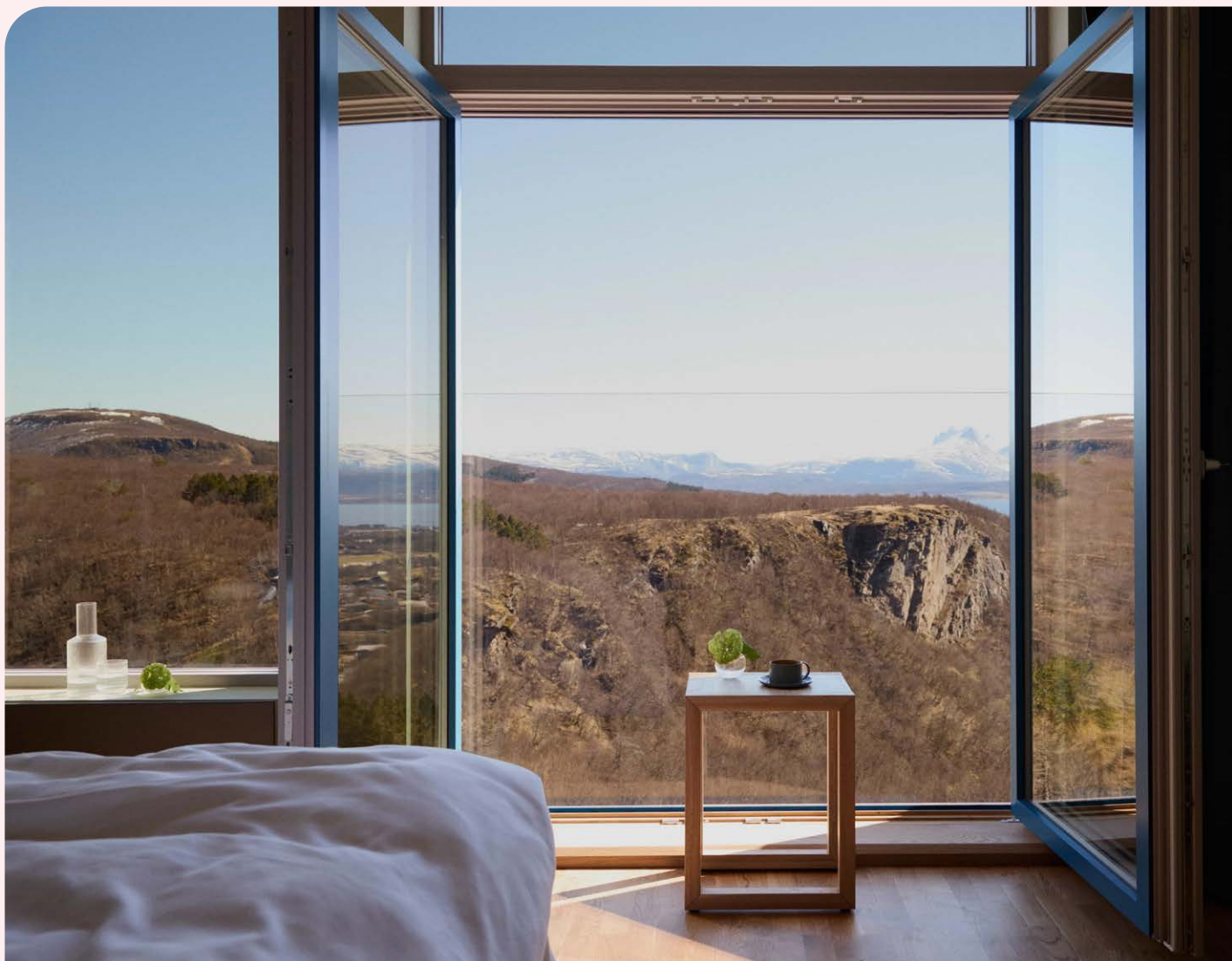


NB: The percentages in the graphs are have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages at or below 3% are not included.

Source: The 2023 Tourism Survey, Innovation Norway

05

Commercial overnight stays



Major growth in self-catered accommodation

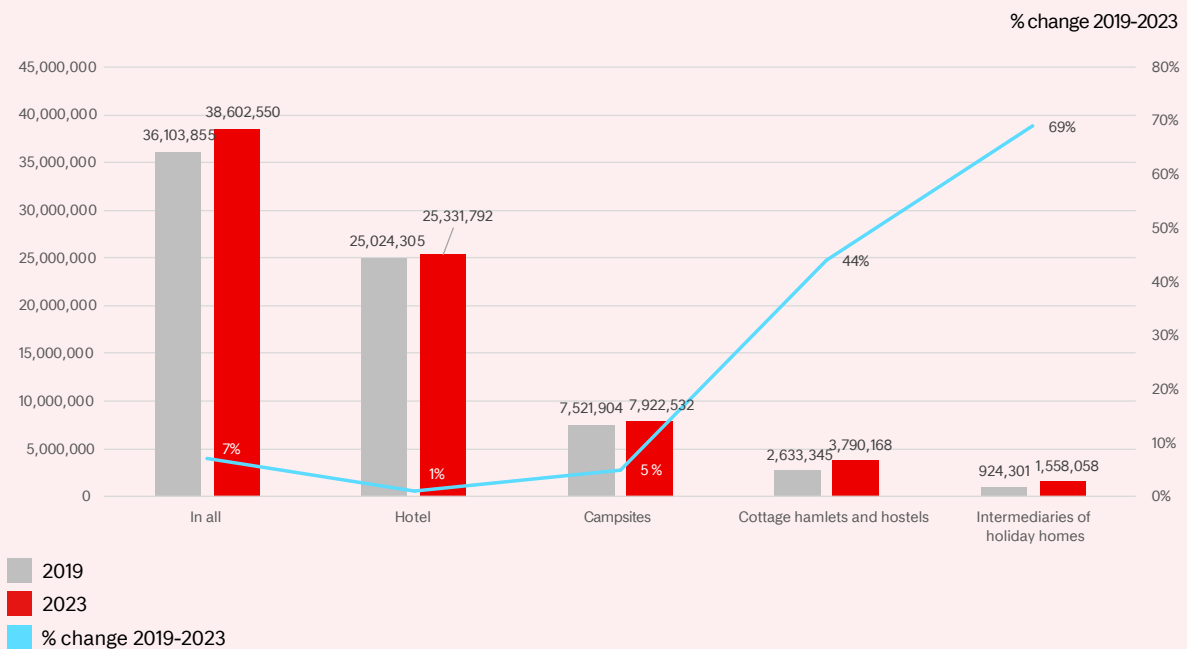
Commercial accommodation and overnight stays through holiday home providers are those shown in the official statistics of the number of overnight stays in Norway. Calculations from the Tourism Survey of overnight stays outside of the official statistics are also included, as shown on the preceding pages.

In 2023, there were 38.6 million overnight stays at commercial accommodations and through Norwegian holiday home providers. This is an increase of seven per cent compared to 2019, equivalent to 2.5 million more overnight stays. 307,500 of the overnight stays from that growth were at hotels, while a total of 1.6

million were at holiday cabins and hostels. Furthermore, 600,000 were through holiday home providers, and 400,000 was an increase in the number of overnight stays at campsites.

The relatively low growth for hotels results in the share of overnight stays at hotels falling from 69 per cent in 2019 to 66 per cent in 2023. The increase in the number of overnight stays at hotels of one per cent is due to an increase of four per cent among Norwegian travellers. The number of foreign overnight stays at hotels is still five per cent below 2019 levels.

Commercial overnight stays and overnight stays through holiday cabin providers



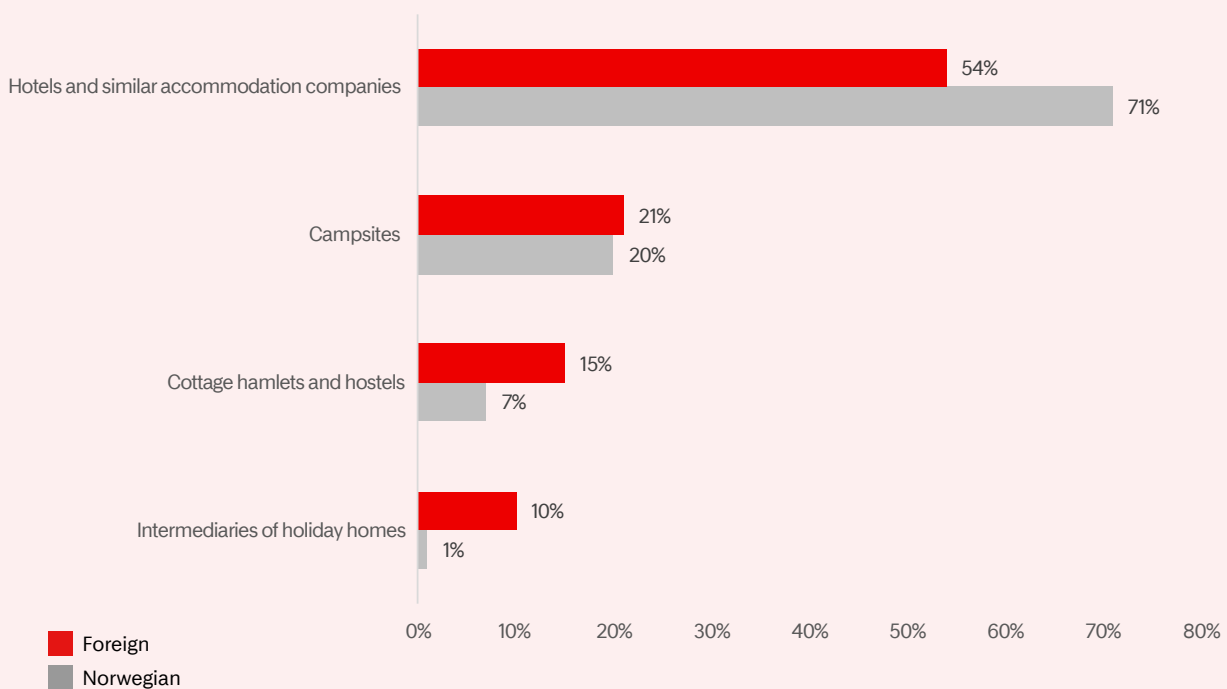
Source: Statistics Norway

Commercial overnight stays and overnight stays through Norwegian providers

71 per cent of all Norwegian commercial overnight stays in 2023 were at hotels. This is in comparison to 54 per cent for all overnight stays by foreigners. This represents a decrease from 2019, where the proportion was 66 per cent. The number of foreign

overnight stays at hotels has fallen by five per cent compared to 2019, going from 7 million to 6.7 million in 2023. At the same time, there has been an increase in overnight stays by foreigners at campsites, in holiday cabins and at hostels.

Distribution of commercial overnight stays and overnight stays through Norwegian providers



Source: Statistics Norway

Germany strengthens its position

For many years Germany has been the largest foreign market for Norwegian tourism, and in 2023, the country only increased its importance. With over 2.3 million overnight stays, Germany now represents 21 per cent of all overnight stays by foreigners. This 18 per cent growth corresponds to 345,630 more overnight stays than in 2019. Furthermore, the Tourism Survey shows us that many Germans utilise accommodation that is not included in official statistics, particularly campervans outside of campsites.

The Netherlands is another market that has shown strong growth since the pandemic. Beyond a

significant increase in the figures for overnight stays from Statistics Norway, there has also been strong growth in overnight stays outside of campsites.

When we look at the top foreign markets, Germany comes out on top with an even greater market share. The US has taken second place from Sweden, which held that spot in 2019. This is followed by the Netherlands, Denmark and the UK in the same order as 2019. In 2019, the six largest markets held a 58 per cent market share and have increased this share to 63 per cent in 2023.



Commercial overnight stays

	2007	2013	2016	2019	Share in 2019	2020	2021	2022	2023	Share in 2023	Change 2022- 2023	Change 2019- 2023
Total	28,663,930	29,243,016	33,114,132	35,179,554	100%	23,720,833	27,092,046	36,127,194	37,044,492	100%	3%	5%
Norwegian	20,338,157	21,551,330	23,387,248	24,478,073	70%	20,402,530	23,782,515	26,313,965	25,907,064	73%	-2%	6%
Total foreign visitors	8,325,773	7,691,686	9,726,884	10,701,481	30%	3,318,303	3,309,531	9,813,229	11,137,428	27%	13%	4%
Germany	1,703,050	1,309,550	1,687,582	1,955,111	18%	565,953	788,659	2,213,667	2,300,749	21%	4%	18%
USA	330,727	303,199	496,626	956,174	9%	203,954	211,696	819,080	1,109,159	10%	35%	16%
Sweden	912,915	999,339	1,189,888	1,103,425	10%	397,600	376,801	996,498	1,098,202	10%	10%	0%
The Nether- lands	873,342	519,989	658,478	773,696	7%	171,852	217,594	1,056,754	1,018,928	9%	-4%	32%
Denmark	1,006,816	835,121	828,916	755,652	7%	589,832	262,335	830,456	825,675	7%	-1%	9%
UK	755,172	581,496	734,876	649,981	6%	288,742	179,954	567,273	677,195	6%	19%	4%
France	291,826	285,525	372,107	451,608	4%	65,530	114,200	461,000	499,152	4%	8%	11%
Switzerland	121,970	139,545	204,456	243,469	2%	43,380	57,178	267,826	322,008	3%	20%	32%
Spain	313,766	174,862	304,303	343,513	3%	43,286	70,186	267,916	308,466	3%	15%	-10%
Italy	228,275	164,254	235,288	273,372	3%	65,730	101,058	265,617	288,373	3%	9%	5%
Belgium	65,857	81,671	130,164	160,179	1%	27,845	48,978	192,687	233,524	2%	21%	46%
Austria	64,536	67,776	98,760	112,522	1%	23,402	37,288	118,856	134,212	1%	13%	19%
Australia	41,620	61,294	87,498	125,339	1%	22,041	4,052	54,115	115,147	1%	113%	-8%
China	70,694	161,878	392,529	471,822	4%	27,614	6,135	25,146	90,472	1%	260%	-81%
South Korea	40,609	57,042	88,157	104,339	1%	5,670	749	22,365	75,340	1%	237%	-28%
Canada	23,548	38,724	43,022	57,935	1%	8,993	3,871	46,904	65,196	1%	39%	13%
India	n/a	n/a	n/a	106,608	1%	27,152	13,661	41,295	62,851	1%	52%	-41%
Singapore	n/a	n/a	n/a	38,623	0%	6,190	1,286	24,614	47,531	0%	93%	23%
United Arab Emirates	n/a	n/a	n/a	40,068	0%	3,345	3,748	35,088	46,625	0%	33%	16%
Brazil	13,847	38,999	35,582	50,726	0%	11,001	4,516	30,326	43,666	0%	44%	-14%
Thailand	n/a	n/a	n/a	53,132	0%	10,931	2,790	15,118	33,110	0%	119%	-38%
Taiwan	n/a	n/a	n/a	49,079	0%	4,325	194	5,103	32,991	0%	547%	-33%
Japan	115,962	103,882	111,579	100,283	1%	8,833	4,807	14,819	32,704	0%	121%	-67%
Malaysia	n/a	n/a	n/a	24,238	0%	4,115	1,110	9,840	20,616	0%	110%	-15%
Russia	130,434	211,805	105,285	154,189	1%	19,033	16,401	20,711	17,339	0%	-16%	-89%
Mexico	6,716	12,413	11,082	15,138	0%	3,071	2,560	12,316	17,297	0%	40	14
Indonesia	n/a	n/a	n/a	25,140	0%	3,996	969	6,471	13,638	0%	111%	-46%
Qatar	n/a	n/a	n/a	13,669	0%	4,781	5,602	12,581	13,350	0%	6%	-2%
Other countries	1,214,091	1,543,322	1,910,706	1,492,451	14%	660,106	771,153	1,378,787	1,593,912	14%	16%	7%

Source: Statistics Norway

Overnight stays via Norwegian holiday home providers

In addition to commercial accommodation, which includes hotels, campsites, hostels and holiday cabins, Statistics Norway also publishes data on accommodation from Norwegian holiday home providers. From 2019 to 2023, the number of such overnight stays increased from 924,300 to 1.56 million, a growth of 69 per cent. The number of overnight stays by foreigners has increased by 53 per cent, while the number of overnight stays by Norwegians has more than doubled over the same

period. In contrast to commercial overnight stays, where Norwegians are dominant, Denmark is the largest market for overnight stays through Norwegian providers, followed closely by Norway. German overnight stays also hold a significant share, and together these three markets make up 73 per cent of the total.

Until 2019, Statistics Norway only published data for a few markets.

	2019	2023	% change	Share in 2023
In total	924,301	1,558,058	69%	100%
Total foreign visitors	767,712	1,173,241	53%	75%
Denmark	242,730	396,784	63%	25%
Norway	156,589	384,817	146%	25%
Germany	229,459	358,490	56%	23%
Sweden	186,151	240,883	29%	15%
The Netherlands	37,141	65,150	75%	4%
British	14,336	27,748	94%	2%
Belgium	n/a	5 200	n/a	0
Switzerland	n/a	5,450	n/a	0
Austria	n/a	5,355	n/a	0
France	2,272	2,920	29%	0
Italy	n/a	1,171	n/a	0
Spain	n/a	701	n/a	0
Other countries	55,623	63,389	14%	4%

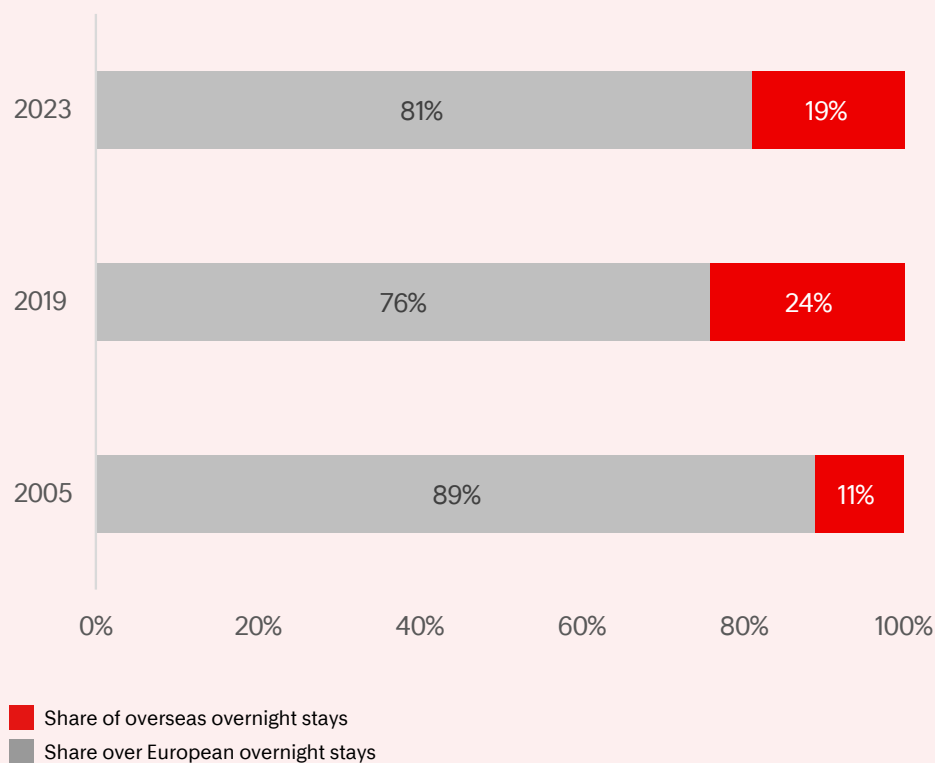
Source: Statistics Norway



Distribution of overnight stays between European and overseas markets

European countries have always been important for Norwegian tourism, but up to 2019 they were not growing at the same rate as overseas markets, which took an increasingly large share each year. In 2005, the overseas market represented 11 per cent of foreign overnight stays. In 2018, this share had

increased to 23 per cent, and in 2019 it was at 24 per cent. However, by 2023 this had dropped to 19 per cent. It is only Americans who have returned to their previous levels. Of the 11.1 million foreign overnight stays that year, 2.1 million came from overseas markets, of which 1.1 million were Americans.



Source: Statistics Norway

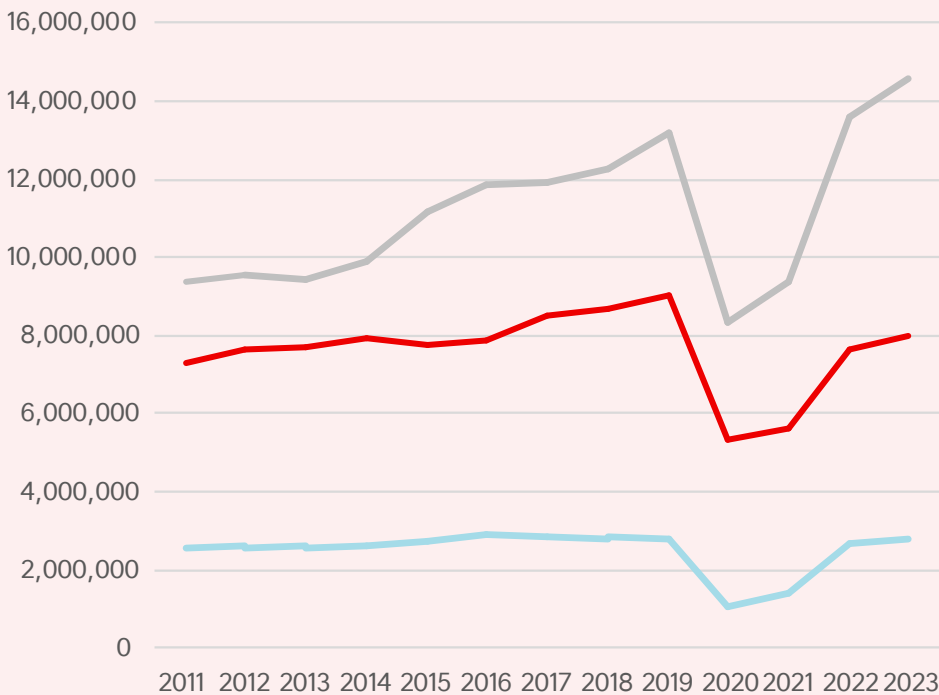
Prioritising holiday travel – business traffic has not returned

In 2023, 25.3 million overnight stays at hotels were registered, an increase of one per cent on 2019. This growth is due to a four per cent increase in Norwegian overnight stays at hotels. However, the number of foreign overnight stays at hotels has not returned to its pre-pandemic level, at five per cent below this.

Holiday and leisure traffic driving growth

The number of holiday-related overnight stays at hotels is ten per cent higher than the 2019 level. Business travel, however, is down 11 per cent, while course and conference-related overnight stays have increased in 2023, sitting just one per cent below 2019 levels.

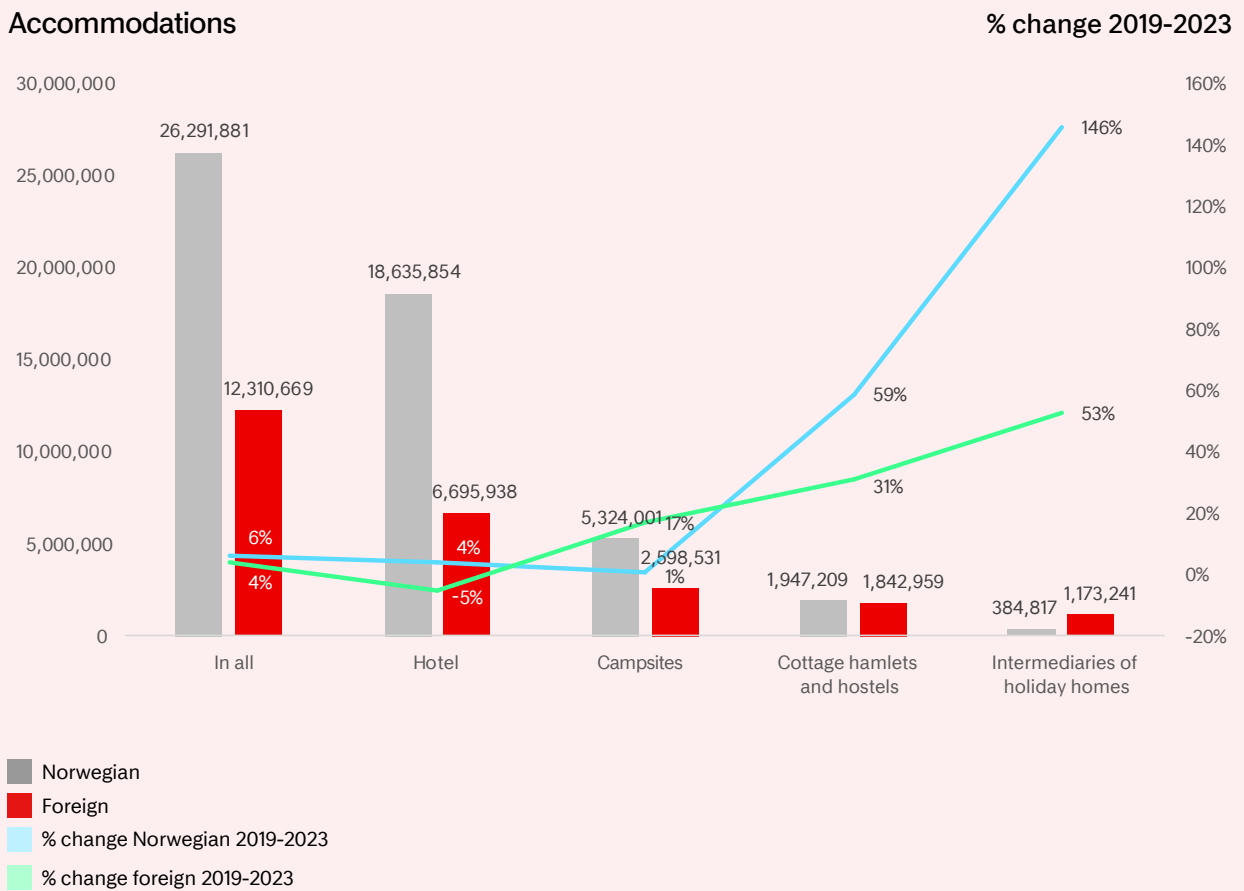
Overnight stays at hotels



- Course, conference
- Business
- Holiday/pleasure

Source: Statistics Norway

Commercial overnight stays and overnight stays through holiday home providers



Source: Statistics Norway

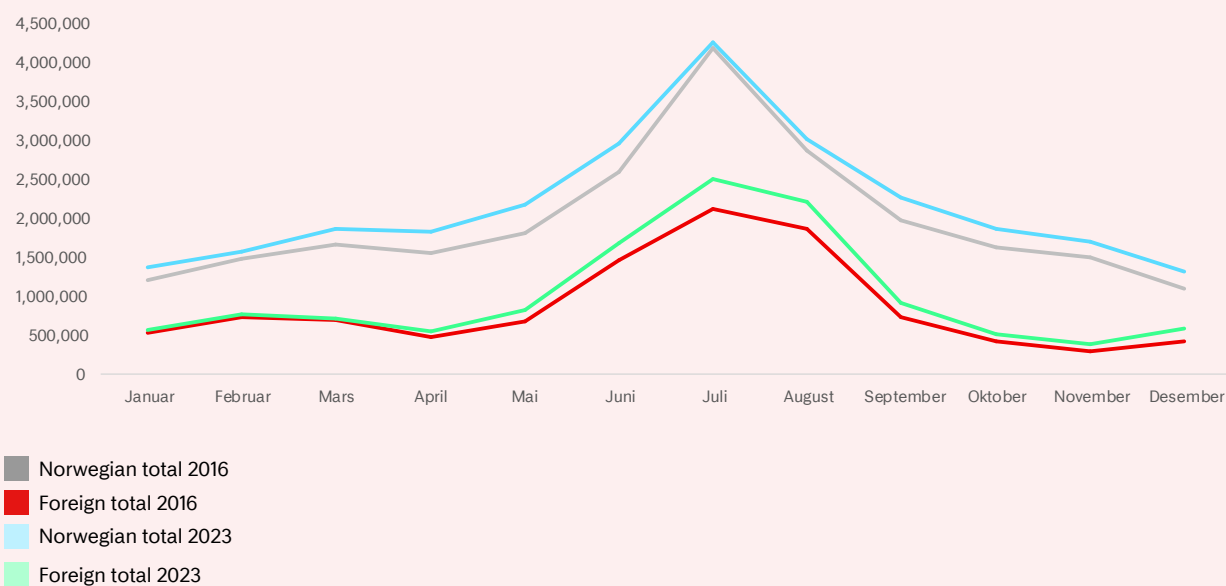
Commercial overnight stays and overnight stays through Norwegian providers

Figures published by Statistics Norway show that the number of overnight stays by Norwegians has increased from 23.7 million in 2016 to 26.3 in 2023. The number of overnight stays by foreigners increased from 10.5 million to 12.3 million for the same period. When we look at the distribution of overnight stays throughout the year, the growth in overnight stays by Norwegians is spread evenly across the year. This is reflected in the GINI coefficient, which measures seasonal adjustments, and which has decreased

from 21 in 2016 to 19 in 2023. Contrary to this, the development in overnight stays by foreigners has gone in the opposite direction. As the graph shows, we have seen a positive development in overnight stays by foreigners over the course of the year, but the growth is greatest in July and August. The proportion of overnight stays by foreigners in these two months has increased from 38 per cent in 2016 to 39 per cent in 2023.

Commercial overnight stays and overnight stays through holiday homes providers sees good development from 2016

Accommodations



Source: Statistics Norway

All of Norway – all year round

Over recent years, Norwegian tourism has attempted to extend the season, and important goal of the national tourism strategy. As shown in previous data, we have registered more overnight stays throughout the year. Though the growth in the number of overnight stays is significantly greater in the summer season, which has led to the GINI coefficient stabilising at the same level as before the pandemic.

In 2023, an increase of 2.5 million overnight stays was recorded.

The number of recorded overnight stays increased from 36.1 million in 2019 to 38.6 million in 2023. This increase of 2.5 million overnight stays is illustrated in the graph, which shows the distribution across the year.

September saw the largest increase, with 365,430 more overnight stays recorded than in 2019. This is followed by the summer months of May and June, after which comes February, April and December. July is the month with the largest total overnight stays, with 6,784,195 overnight stays, but this was also the month with the lowest growth in 2023.

Even though the summer season still has the most recorded overnight stays of 2023, the growth is greater at other times of the year. This has resulted in the share of overnight stays in the summer season decreasing from 52 per cent in 2019 to 51 per cent in 2023. Of the total growth of 2.5 million overnight stays, 900,000 were in the summer months, while 1.6 million were split across the remaining months.

Increase in recorded overnight stays



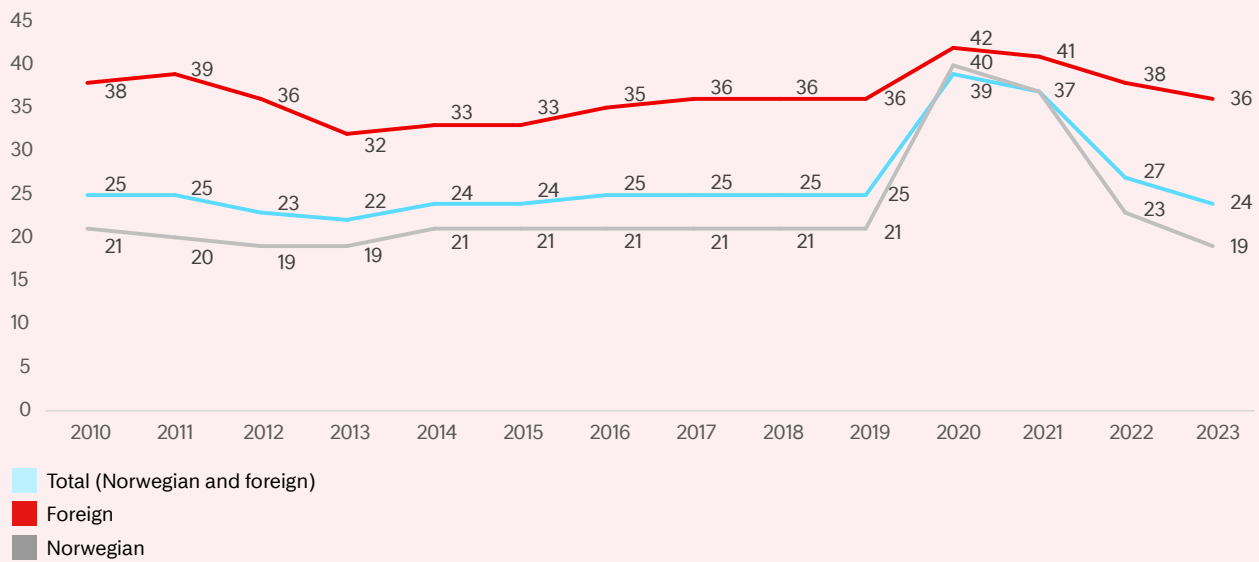
Overnight stays recorded by Statistics Norway as commercial overnight stays and overnight stays through Norwegian providers

Source: Statistics Norway

We have achieved a better seasonal adjustment in overnight stays by Norwegians, with an index of 19. In comparison, the index for overnight stays by foreigners is higher, at 36, due to the highest number of overnight stays in the summer months.

What do these numbers mean? The closer to zero the better! The GINI index, or GINI coefficient, is a statistical measurement of distribution, expressed as a value from 0 to 100. If a destination, or country, has an equal number of overnight stays every month throughout the year, the value will be zero. The goal is to achieve as low a value as possible.

Development of the GINI index over time



Source: Statistics Norway and Innovation Norway



Source: Statistics Norway and Innovation Norway

Many destinations are working strategically on distribution of traffic throughout the year

An important goal for many destinations is to ensure year-round jobs in the tourism industry through an even distribution of visitors across the years. This is achieved by focussing on different target groups in holiday and leisure segment, as well as business traffic such as courses, conferences and events etc.

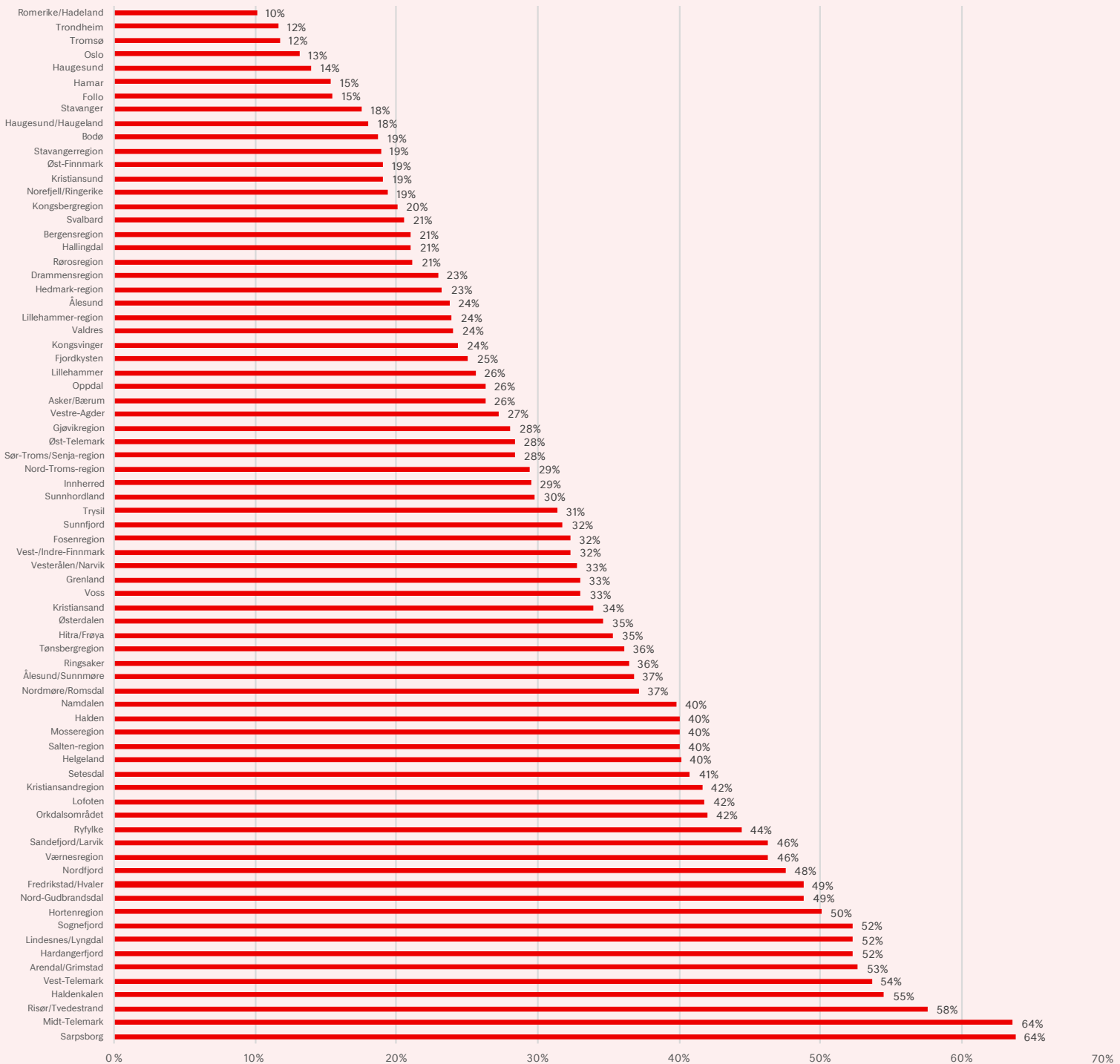
The Romerike/Hadeland region stands out as the tourism region with the most equal distribution of

commercial overnight stays through 2023. With a total of 1.5 million overnight stays, the region is on par with Tromsø and even higher than Trondheim, measured in commercial overnight stays. Both of these regions have also seen a good distribution of overnight stays. Oslo takes fourth place, but is the largest tourism region with 6.35 million overnight stay over the course of the year.



GINI index per tourism region

The graph shows the distribution of overnight stays across the 12 months of the year, without accounting for the total number of commercial overnight stays in each region.



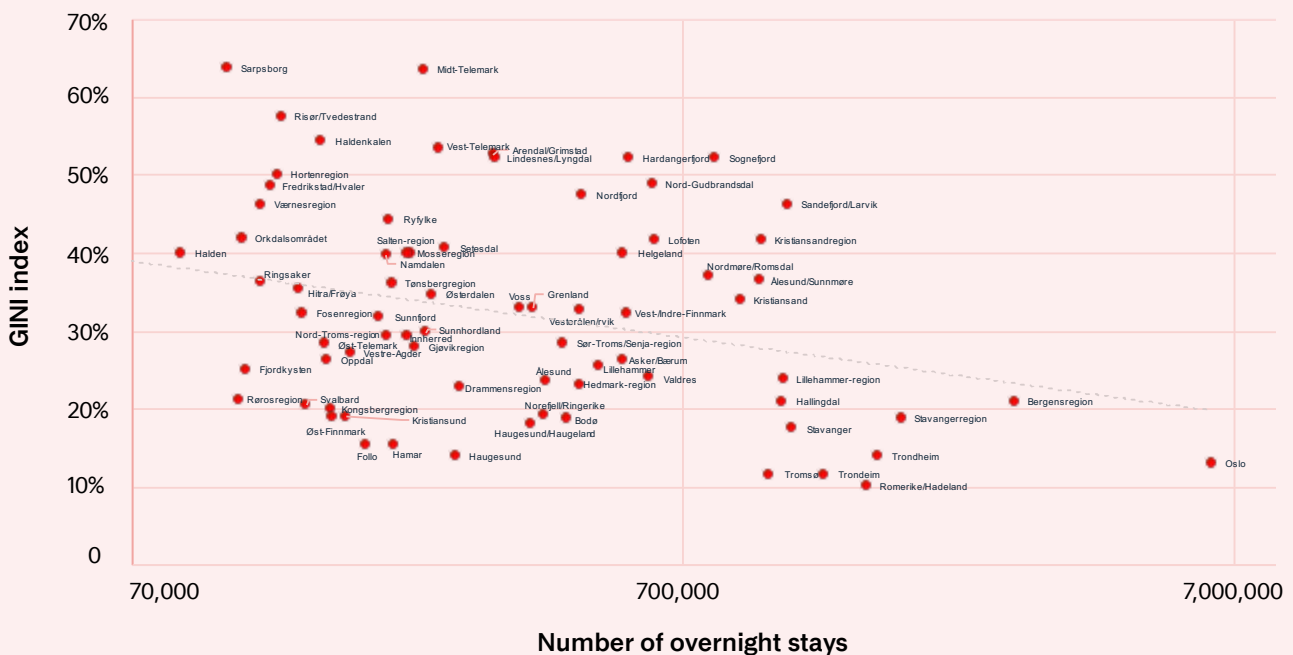
Source: Statistics Norway and Innovation Norway

Oslo has the highest number of overnight stays and the best distribution across the year.

It is also illuminating to look at a destination's number of overnight stays in relation to the distribution across the year. The closer to 0 per cent the score is, the better the distribution. If a region has exactly the same number of overnight stays each month, the score will be 0 per cent. On the

other hand, if all overnight stays occur in a single month, the score will be 100 per cent. At the bottom right of the graph we can see Oslo and the Bergen region, which stand out with the most overnight stays and an even distribution across the year.

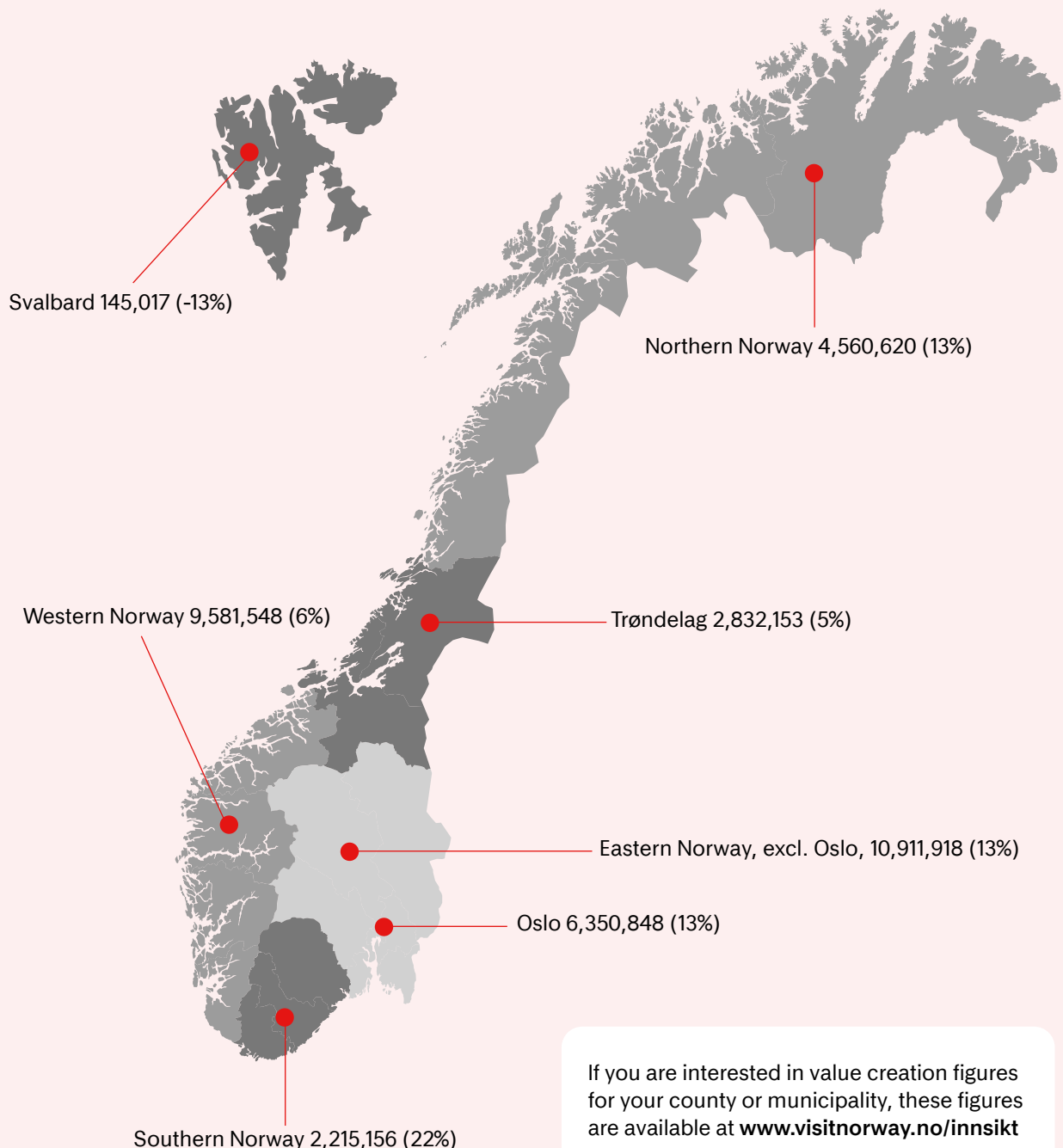
Seasonal fluctuation and overnight stays per tourism region and city



Source: Statistics Norway and Innovation Norway

Commercial overnight stays per region

The figures in brackets are the change from 2019-2023.



06

Characteristics of holidaymakers



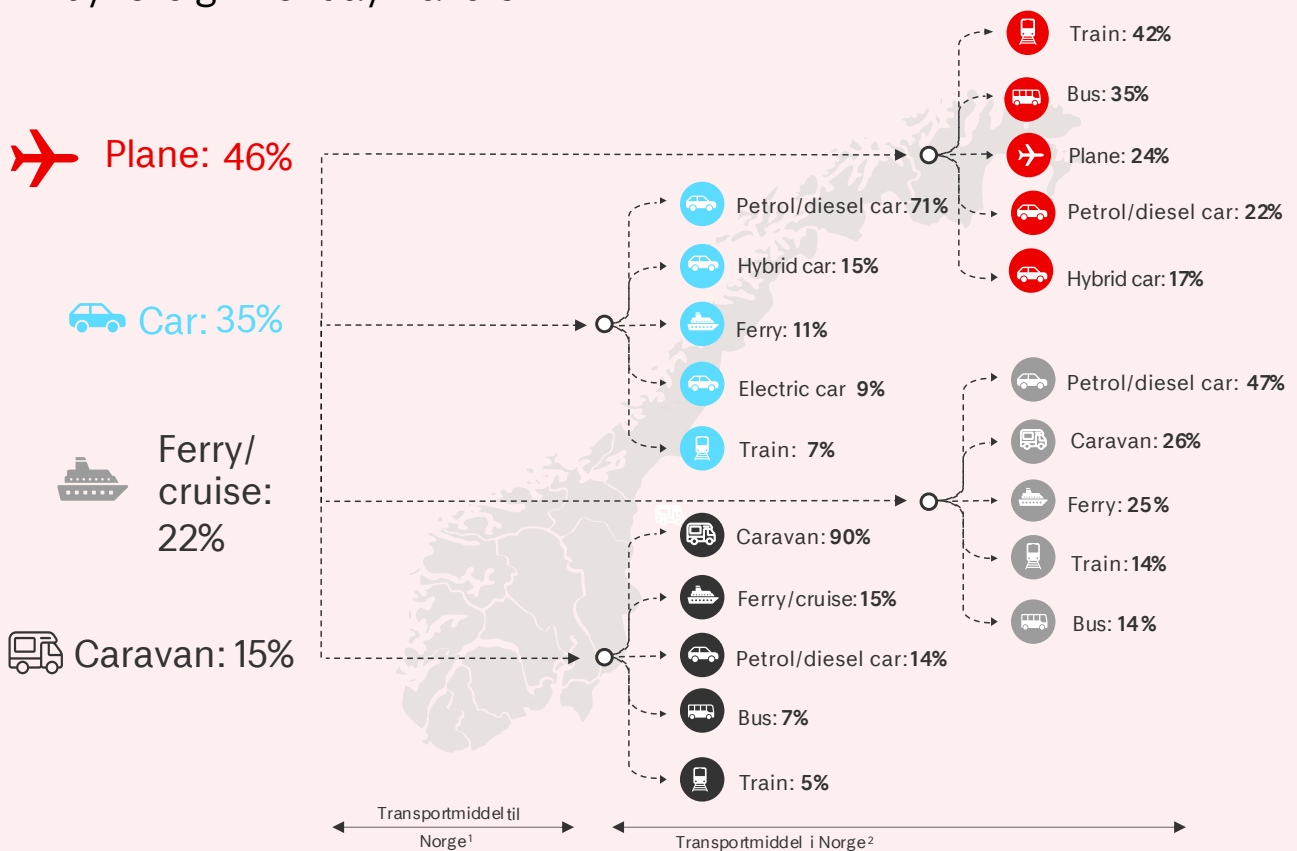
Fewer holidaymakers arriving by plane and using trains

In 2023, 46 per cent of foreign holidaymakers arrived to Norway by plane, a decrease from 61 per cent in 2019. This reduction is due to travellers from Asia not returning to the same extent, as well as a significant increase in the number of visitors from neighbouring markets using cars and campervans.

extent to travel around the country. This has led to the share using trains during their visit to Norway decreasing from 34 per cent in 2019 to 24 per cent in 2023, while the share using buses has sunk from 27 per cent to 22 per cent over the same period.

Those arriving in Norway by plane use means of transport such as trains and buses to a greater

Combination of means of transport to and in Norway by foreign holidaymakers

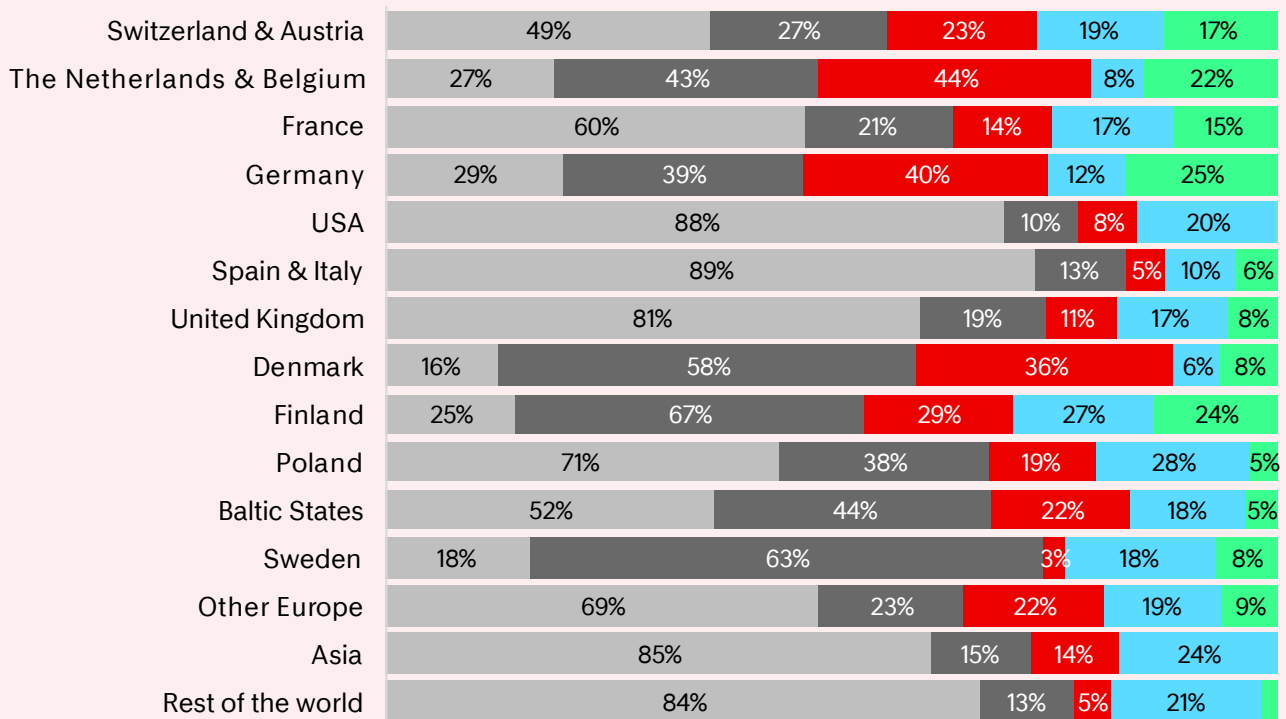


NB: 1: It is possible to choose multiple forms of transport if there is a need for more than one means of transport for travel to and within Norway. Therefore, the numbers add up to more than 100%. "Ferry/Cruise" (to Norway) includes Color Line, Fjordline and other ferry/cruise lines.

2: "Ferry/Cruise" (in Norway) includes Hurtigruten, Havila and other ferry/cruise lines.

Source: The 2023 Tourism Survey, Innovation Norway

Mode of transport to Norway by holiday market



Aeroplane
 Train/bus
 Car
 Campervan
 Ferry/Cruise

Source: Innovation Norway

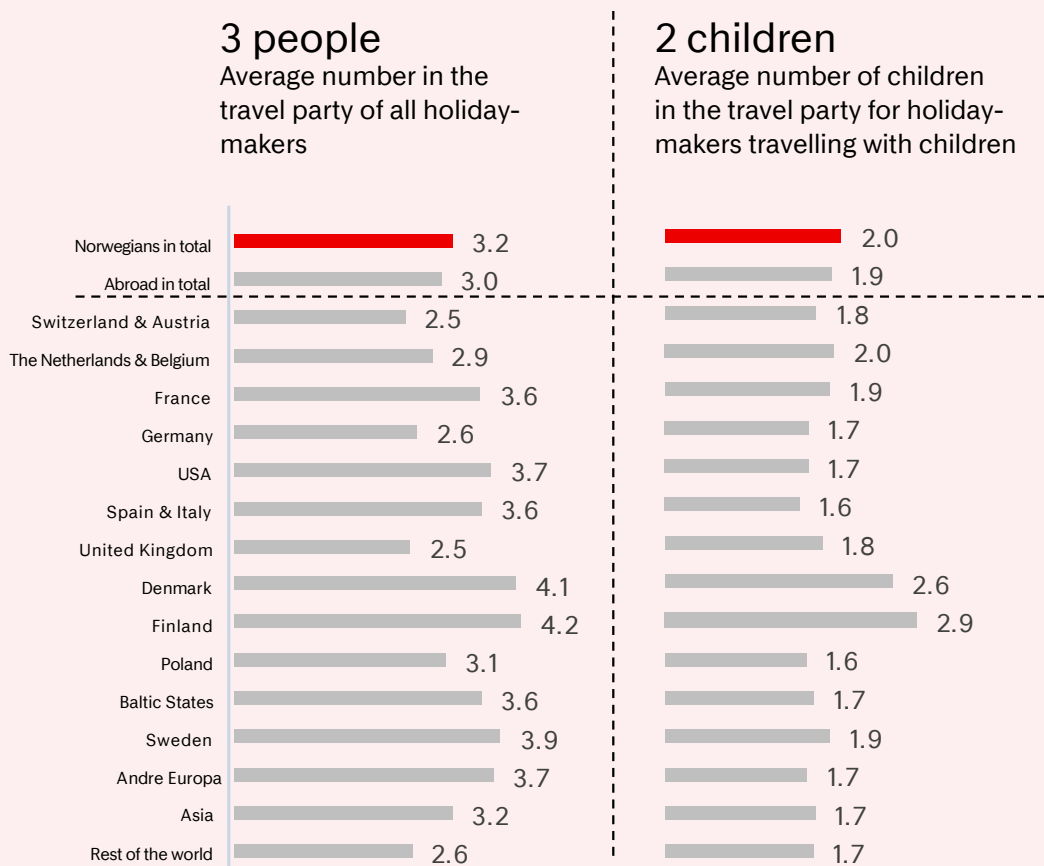


On average, travelling in groups of three

There are small variations between markets when it comes to the number of people in a travel party. On average, Norwegians travel in groups of three for holidays in Norway, and the same is true of our foreign visitors.

Those that do stand out somewhat are Danes and Finnish families with children, who on average have a few more children with them on holidays to Norway. A significant proportion of Danes travelling in larger groups are ski tourists during the winter.

Average number of travelling companies in a group



Source: The Tourism Survey, Innovation Norway

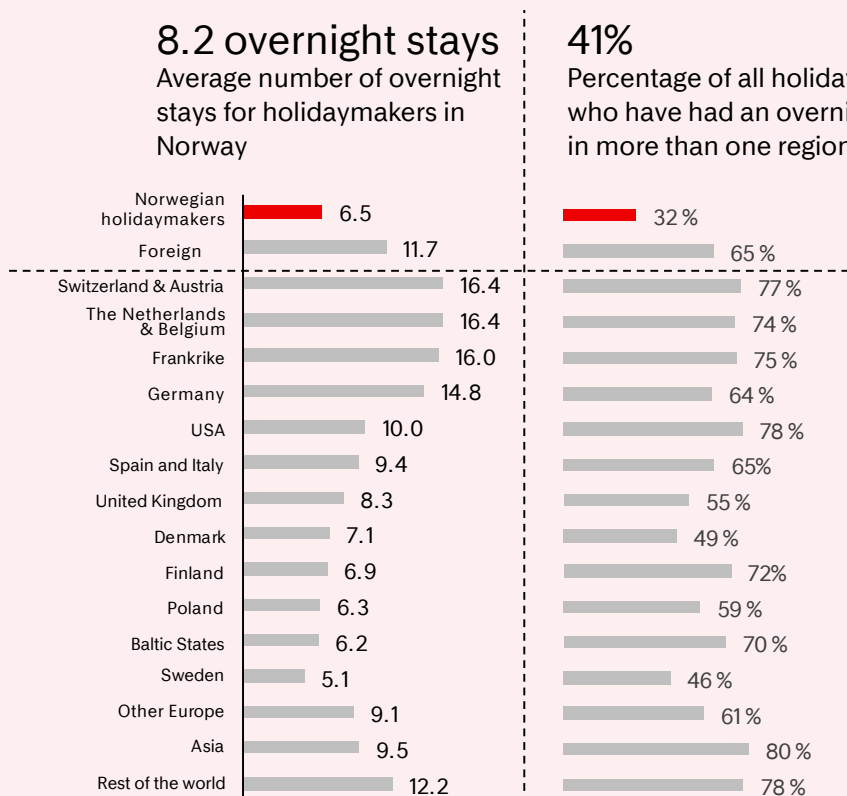
Foreign tourists are on holiday almost twice as long as Norwegians

The average number of overnight stays for holidaymakers in Norway is 8.2 nights. Norwegian holidaymakers have an average of 6.5 nights, while foreign holidaymakers have an average of 11.8 nights.

Norway is long country with lots to experience both in the south and the north

Our foreign visitors do not just spend many days in the country, but they use their time to travel around and visit several reasons. This does not just apply to those coming with their own car or campervan, but also for visitors from the US and Asia who arrive in greater numbers by plane.

Average number of overnight stays and percentage of tours



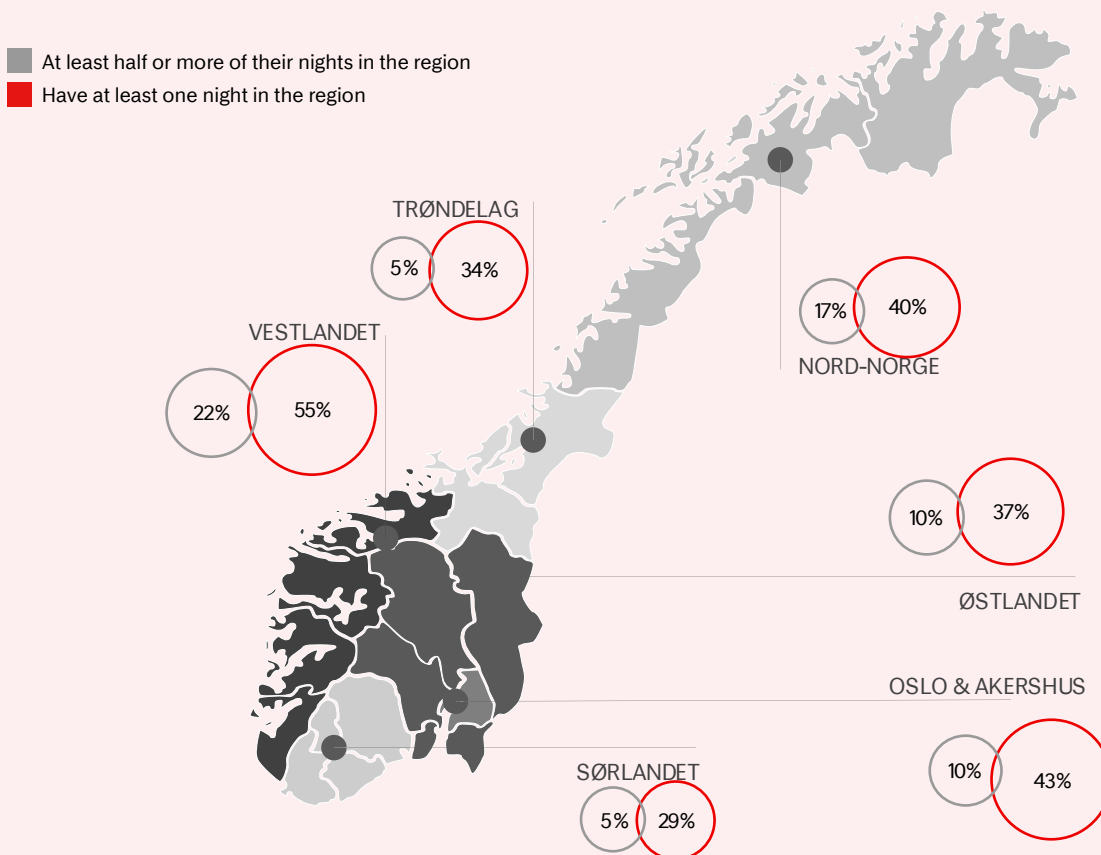
Over half of foreign holidaymakers visit Western Norway

Western Norway, Oslo and Akershus are the most visited region, while Southern Norway is the least visited.

The figures show the percentage of foreign holidaymakers that either stayed for only one night in a region or who stayed for half or more of their nights in Norway in the region. Western Norway is the most

visited region for foreign holidaymakers in 2023, with 55 per cent staying for at least one night there. Furthermore, Oslo and Akershus, as well as Northern Norway, top the list of where foreign holidaymakers spend their time. Southern Norway is the region with the fewest foreign overnight stays, but is where Norwegians dominate.

Share of tourists who have stayed overnight in the different regions



Source: The Tourism Survey, Innovation Norway

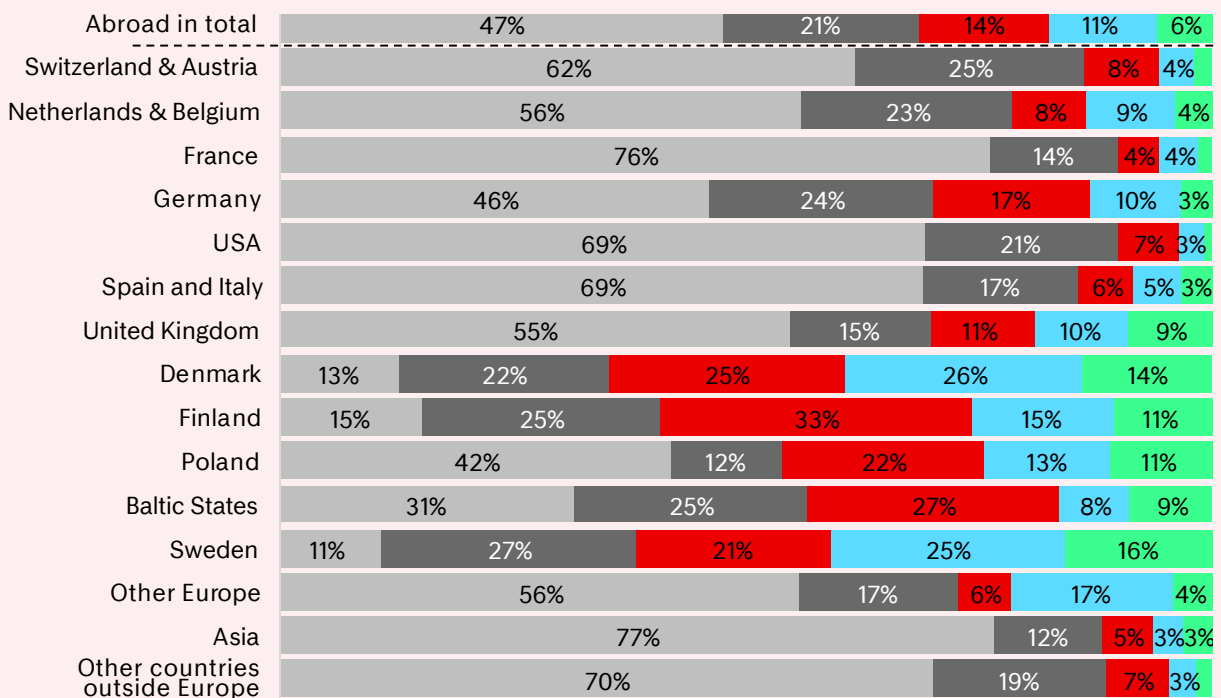
Norway has a good mixture of return visitors and first-time visitors

In 2023, 47 per cent of holidaymakers were in Norway for the first time, a decrease from 53 per cent in 2019. This reduction in first-time visitors may be down to the significant increase from neighbouring markets and that travellers from Asia have not returned to the same extent.

The largest share of first-time visitors come from countries outside of Europe. This is a trend we have

observed over several years: the longer you travel, the more a trip to Norway becomes a “once-in-a-lifetime” experience. This may also be related to the fact that expenditures amongst these visitors are higher than those from our neighbours who visit the country multiple times. Only 11 per cent of Swedes and 13 per cent of Danes came here for the first time in 2023.

How often do you travel to Norway on holiday?



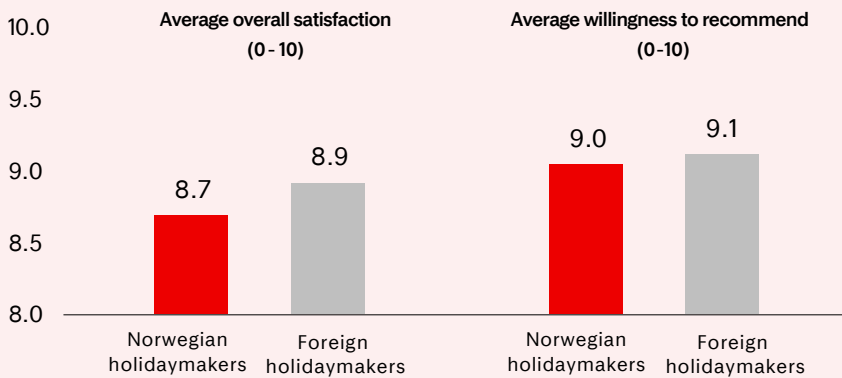
First time in Norway
 Less than every other/third year
 Every two/three years
 Approximately once a year
 Several times a year

Source: The 2023 Tourism Survey, Innovation Norway

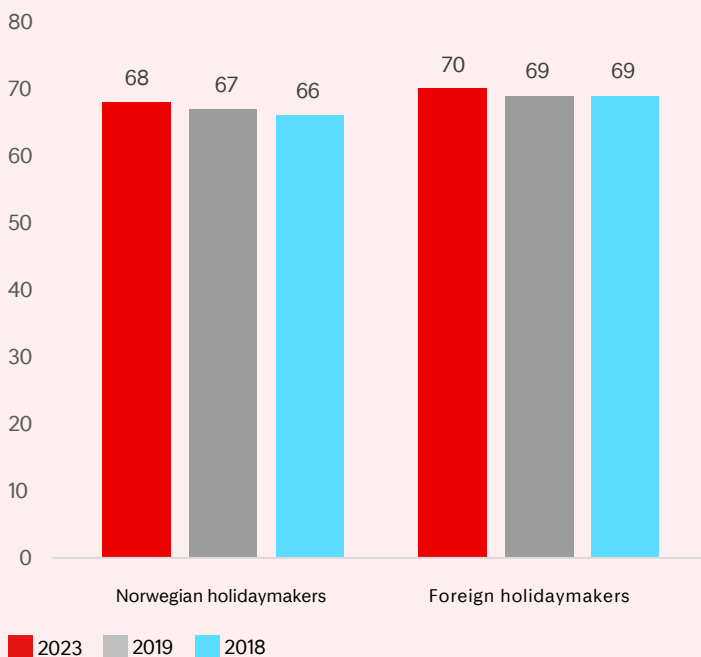
High satisfaction with holidays in Norway and many would recommend Norway as a destination

The average satisfaction among holidaymakers in Norway is generally high. Satisfaction was roughly equal for both foreigners and Norwegian tourists, and the share that would recommend Norway as a destination to others is also equivalent. A measure used to assess loyalty is the Net Promoter Score

(NPS). Both Norwegian and foreign tourists are highly likely to recommend Norway as a holiday destination after holidaying here, though it is slightly higher among foreign visitors. Something interesting to note is that NPS has increased for both Norwegian and foreign visitors from 2018 to 2023.



Net Promoter Score (NPS) over time



NPS Definition

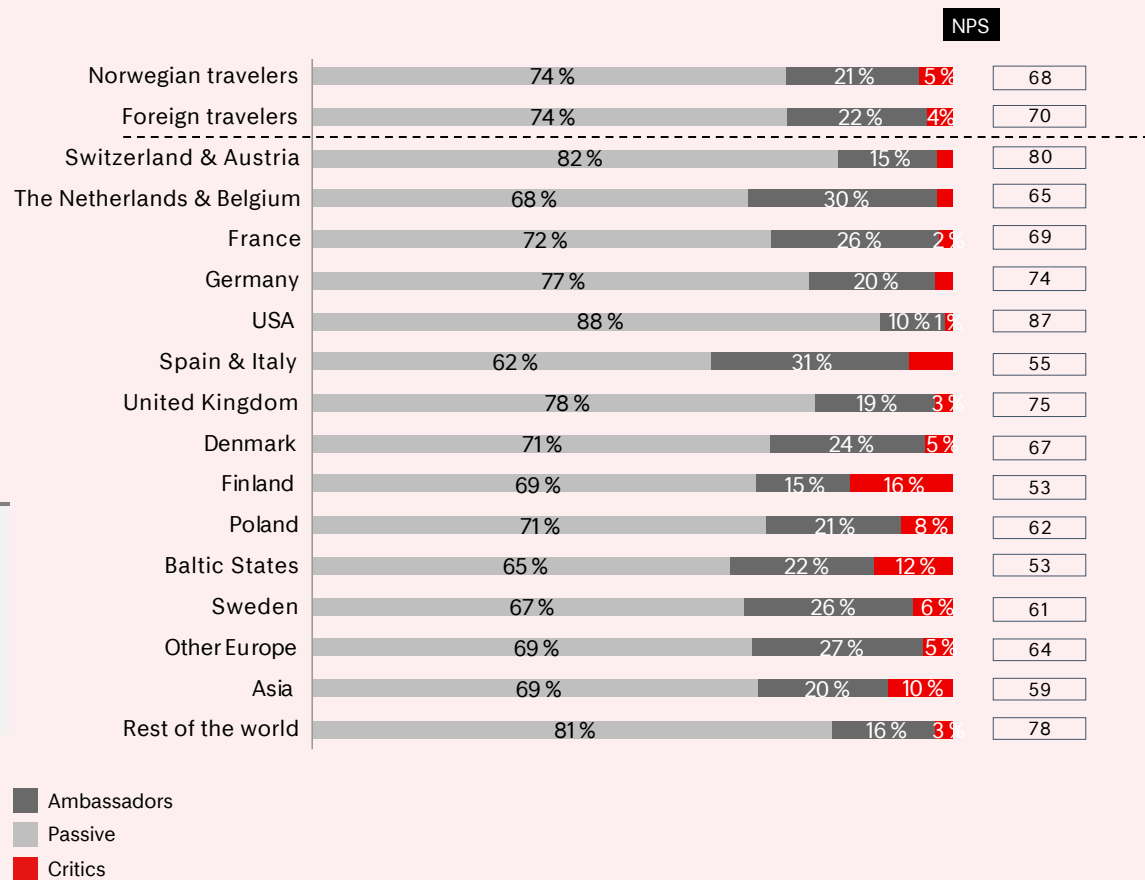
Net Promoter Score (NPS) is a tool for gauging one type of loyalty, and in this context it specifies the percentage of tourists who would recommend the area as a holiday destination. NPS is calculated on the basis of the following question: "On a scale of 0 to 10, where 0 is very unlikely and 10 is very likely, to what extent would you recommend Norway as a tourist destination to others?"

Those who enter a score of 0 to 6 are described as being critics, those who enter a score of 7 or 8 are described as being passive, and those who enter a score of 9 or 10 are described as being ambassadors. The NPS value is defined as the percentage of tourists who are ambassadors, minus the percentage of critics. i.e. $NPS = \% \text{ ambassadors} - \% \text{ critics}$.

Generally speaking, our visitors are satisfied with their holiday in Norway

The graph to the right shows the NPS score by nationality. Travellers from the US and the world, excluding Europe, are generally the most satisfied with their trip to Norway. Within Europe, we see that travellers from the UK, Switzerland and Austria are the most satisfied with their trip to Norway, while travellers from Italy and Spain are the least satisfied generally speaking in Norway.

NPS (Net Promoter Score)



Source: The 2023 Tourism Survey, Innovation Norway

Satisfaction and willingness to recommend

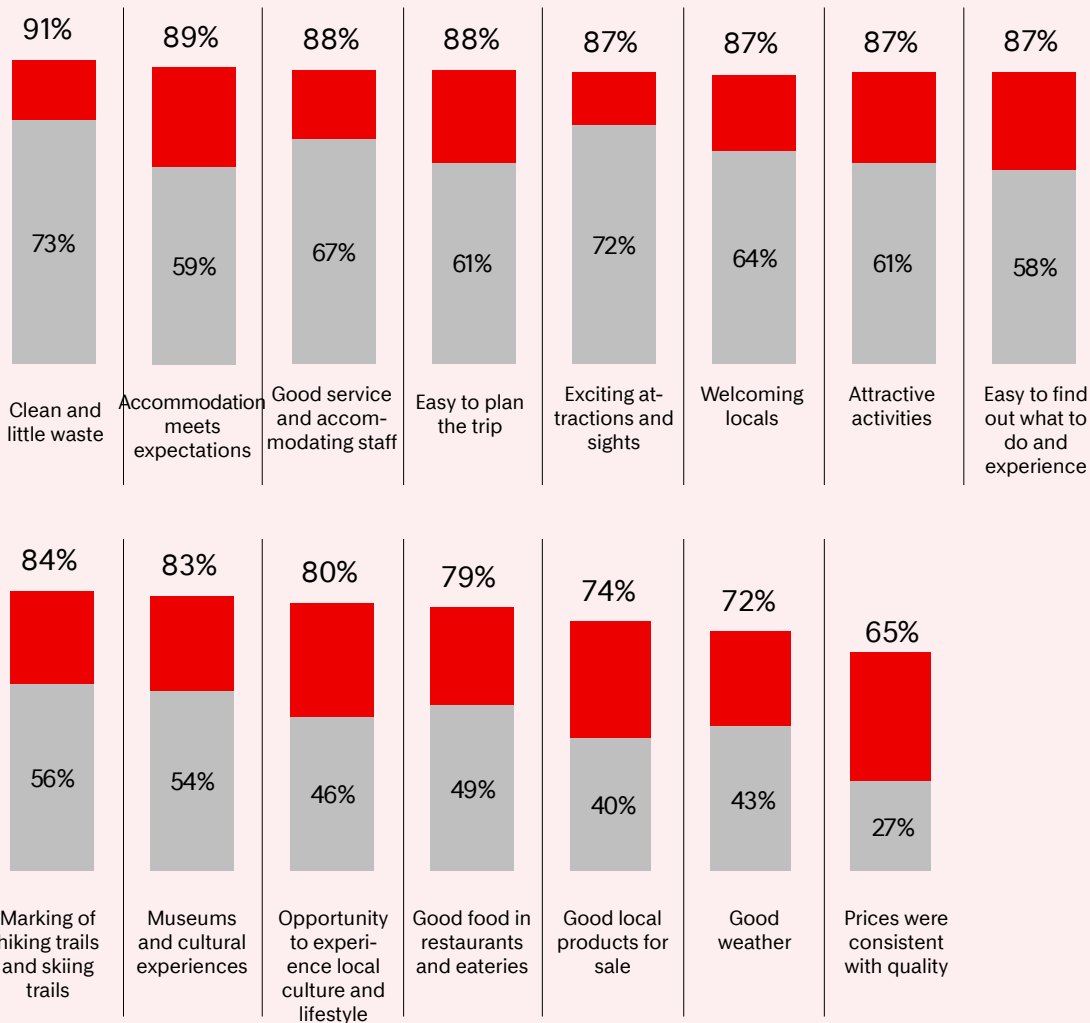
Foreign holidaymakers were most satisfied with how clean and little waste there was, accommodation, service and how easy it is plan a trip to Norway

Interesting facts:

When it comes to visitor satisfaction, the question of “Price in relation to quality” often scores the lowest. What is noteworthy is that there has been a positive development in this area. In 2023, there were significantly fewer who answered “Very satisfied” compared to 2018. This indicates an improvement in the perception of value for money over time. This improvement may be down to the weaker Krone exchange rate and/or an increase in the quality of the Norwegian tourism product.

How satisfied or dissatisfied are you with the following?

■ Very satisfied
■ Very satisfied + somewhat satisfied



07

Environmental considerations



Norway is a sustainable choice for an increasing number of Danes and Swedes

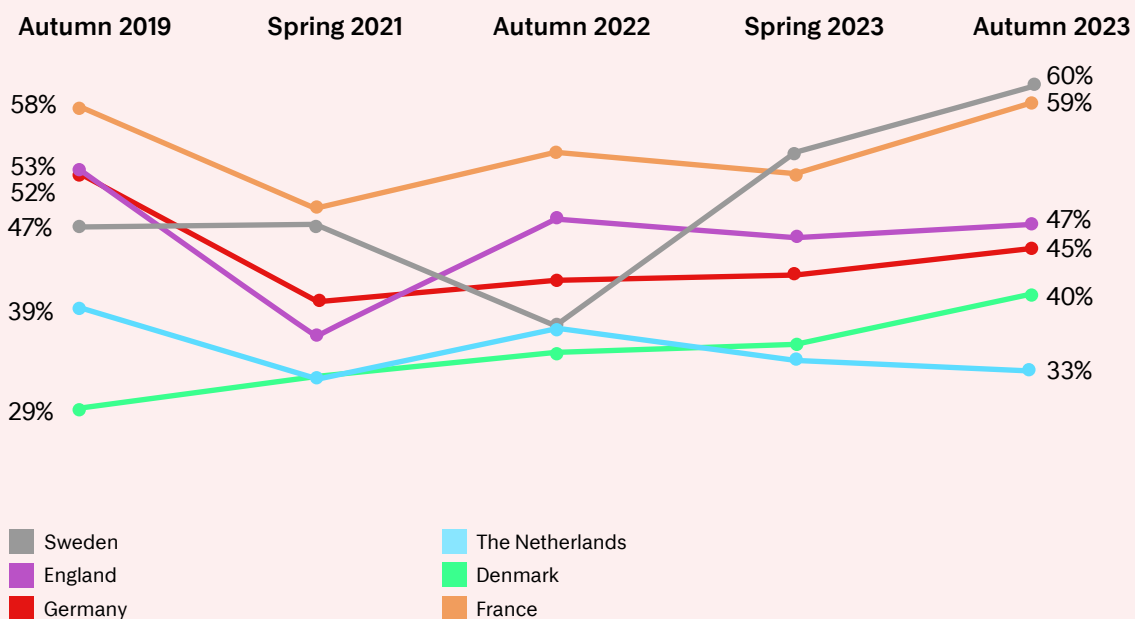
A trip to Norway is perceived as being a more sustainable choice for Swedes and Danes now than before the pandemic. For all other countries, this is at the same level or lower than it was before the pandemic.

The young, families with children, men and those with the highest incomes are more likely to perceive visiting Norway to be a sustainable choice for them.

For many travellers, sustainability is largely about climate-friendly transport and proximity. It is therefore natural that Norway as a sustainable choice strengthens in the markets closest to us.

To what extent do you agree or disagree with the following statement:

Travelling to Norway will be a sustainable choice for me.
Proportion who responded strongly agree or slightly agree.



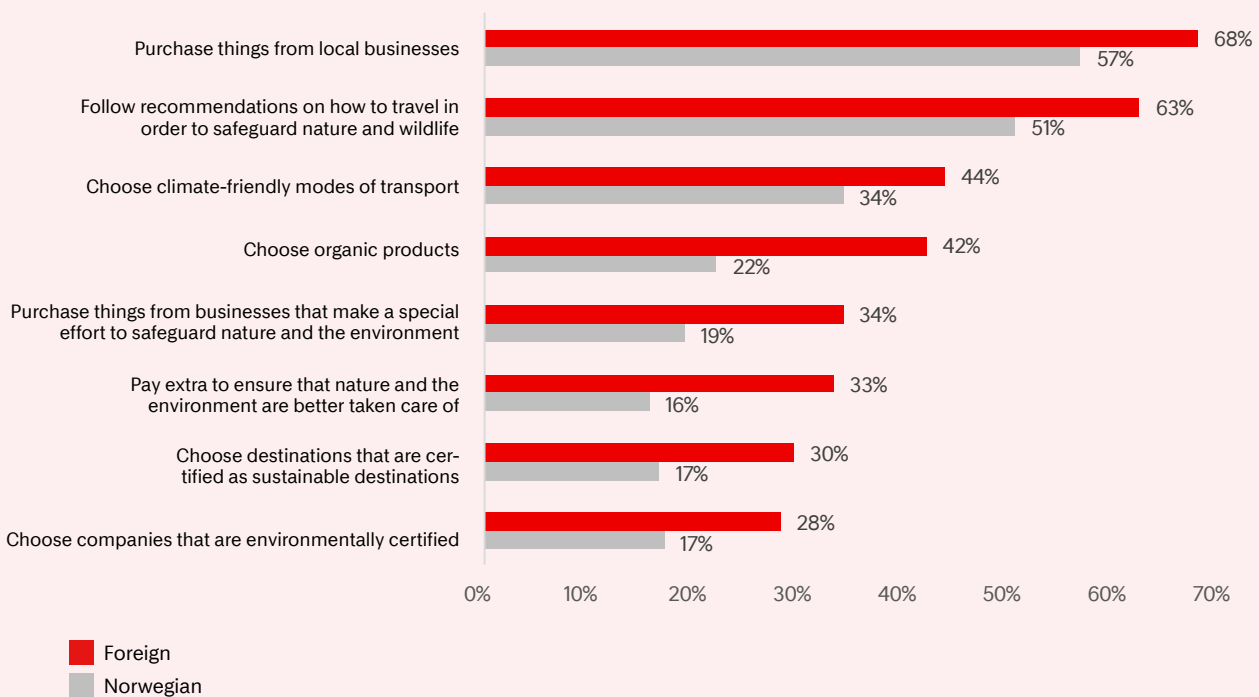
Source: Travel Barometer, Innovation Norway

Environmental consciousness among foreign tourists in Norway

Foreign tourists show a significantly higher degree of environmental consciousness during their stay in Norway compared to Norwegian tourists. The Travel Barometer from Innovation Norway shows that 68 per cent of foreign visitors shopped from local enterprises, while 63 per cent followed advice and recommendations on how they should travel to

safeguard nature and wildlife. Furthermore, 44 per cent answered that they chose environmentally-friendly means of transport, and 42 per cent had chosen organic products. Additionally, 30 per cent answered that they had chosen to visit destinations that are certified as sustainable destinations

Have you done any of the following in order to safeguard the environment, the climate and nature?



Source: The tourism survey, Innovation Norway

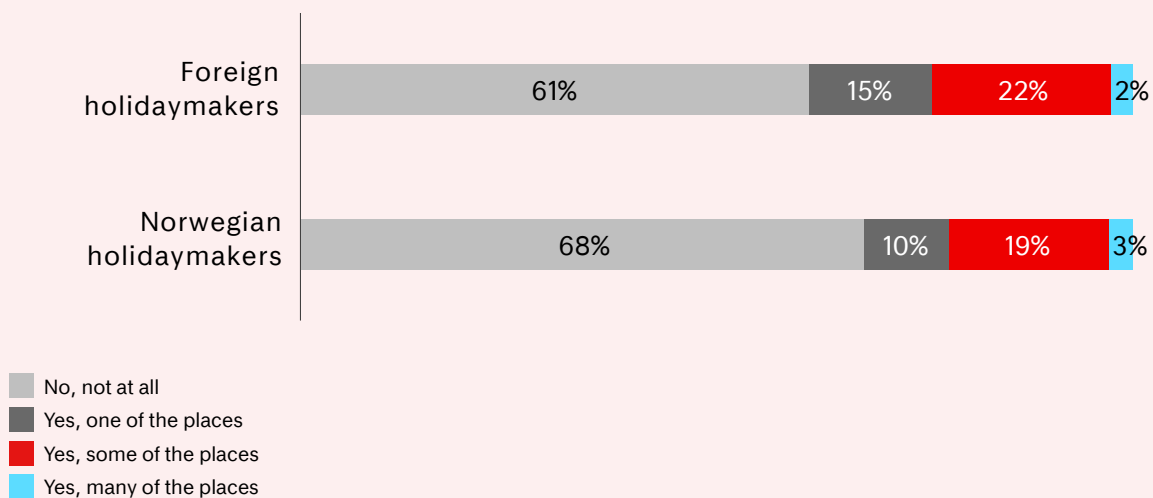
Over-crowded attractions and destinations negatively affect satisfaction

Foreign tourists find to a greater degree that places are over-crowded (39%) compared to Norwegian tourists (32%). Satisfaction with their holiday was also affected by over-crowded attractions and destinations. Both Norwegian and foreign travellers are four points less satisfied with their holiday if they experienced overtourism. At the same time, foreign holidaymakers are generally more satisfied with their holiday. Despite this, there is still a high degree of satisfaction, regardless of whether they experienced overtourism or not.

Satisfaction surveys provide important knowledge for implementing measures that can ensure effective management and organisation at destinations. A key tool for strengthening the strategic direction of the destination is Innovation Norway’s development tool, Sustainable Destinations, which is explained further on the next page.

To what extent do you agree with this statement:

“The places/attractions I visited felt crowded because there were too many tourists there”



Source: The tourism survey, Innovation Norway

Label for Sustainable Destinations – A decade of long-term innovation

Sustainable Destinations is a tool offered by Innovation Norway to destinations that want to work in a long-term and focussed manner for sustainable tourism. Qualifying for the label does not mean that the destination IS sustainable, however the label obliges the destination to long-term and structured work for more sustainable tourism.

In 2013, Innovation Norway launched what is likely the first national label for destinations working in a long-term manner for a more value-creating, inclusive and responsible tourism. In 2023, the label scheme celebrated its tenth anniversary and almost 50 Norwegian destinations are approved for the label. Since the beginning, its aim has been to provide tourism with a tool for a more sustainable development in tourism. Tourism provides opportunities for value creation, employment and local development, but also provides challenges that need to be resolved in partnership with industry, municipalities and local communities.

The label scheme is a voluntary scheme that aims to

contribute to increased sustainability through better governance of local tourism. The target group for the tool is a site, city or rural area wanting to make increased sustainability in tourism more concrete than some lofty ambition. Concrete measures and solutions are implemented in partnership between tourism, municipalities and important stakeholders in the local community. The stakeholders agree on shared plans and priorities, and the destination measures progress over time on a number of indicators that cover the entire breadth of the term sustainability. Different guides and tools are offered to the destinations in the process. At the core of the work is a standard that highlights measures that the destination can and must implement. For example, this could be cooperating on the proper arrangement of hiking trails and attractions in vulnerable natural areas, or it could involve working for good accessibility for everyone visiting the destination, regardless of physical ability. The aim is to strengthen both management capability and value creation through more sustainable solutions and priorities, and that jointly the destination should



be more attractive for residents and guests wanting to experience the local culture, and nature, enjoy local food and use local accommodation.

The destination also works on solutions for guests wanting to travel in an environmentally-friendly way to and around the destination, and measures for guests to be able to contribute to local value creation as much as possible through the use of local services and enterprises.

As a part of this work, the destinations must carry out surveys among the arriving guests, enterprises and not least the residents. The surveys investigate satisfaction and the hopes they have for tourism in the destination. The market for sustainable enterprises and products is increasing, and with it the requirements to document the sustainability. Sustainability in tourism is about long-term commitment to concrete goals, and is most successful when tourism develops through broad-based cooperation.

10 principles of sustainable tourism

As the basis of the scientific content in the Sustainable Destinations label, Innovation Norway has created a concept called the 10 principles of sustainable tourism. These build on the idea that tourism is good for many local communities, both great and small, but also that tourism that develops without a good framework, clear goals and management can lead to challenge for the local community, guests and the tourism industry itself. The challenge of overtourism, greenhouse gas emissions and damage to nature is not unique to Norway, and Innovation Norway works in line with international frameworks for what we mean by sustainable tourism. The standard for the label scheme is also associated with the UN's Sustainable Development Goals.



08

Norwegians' holiday habits



Norwegians travel the most in Europe

According to figures from Eurostat, Norway is the European country with the highest share of the population that goes on holiday over the course of the year. Data from Eurostat shows that Norway already topped the list in 2012, with 91 per cent of the population having been on holiday over the course of the year. Even though Finland took first place for some years, Norway once again took the top spot on the list in 2018, 2019 and 2022, with around 90 per cent of the population going on holiday every year.

In contrast, Bulgaria was at the other end of the list, with only 28 per cent of the population having been on holiday. This is followed by Romania, Italy, Greece, Portugal, Estonia, Croatia and Lithuania.

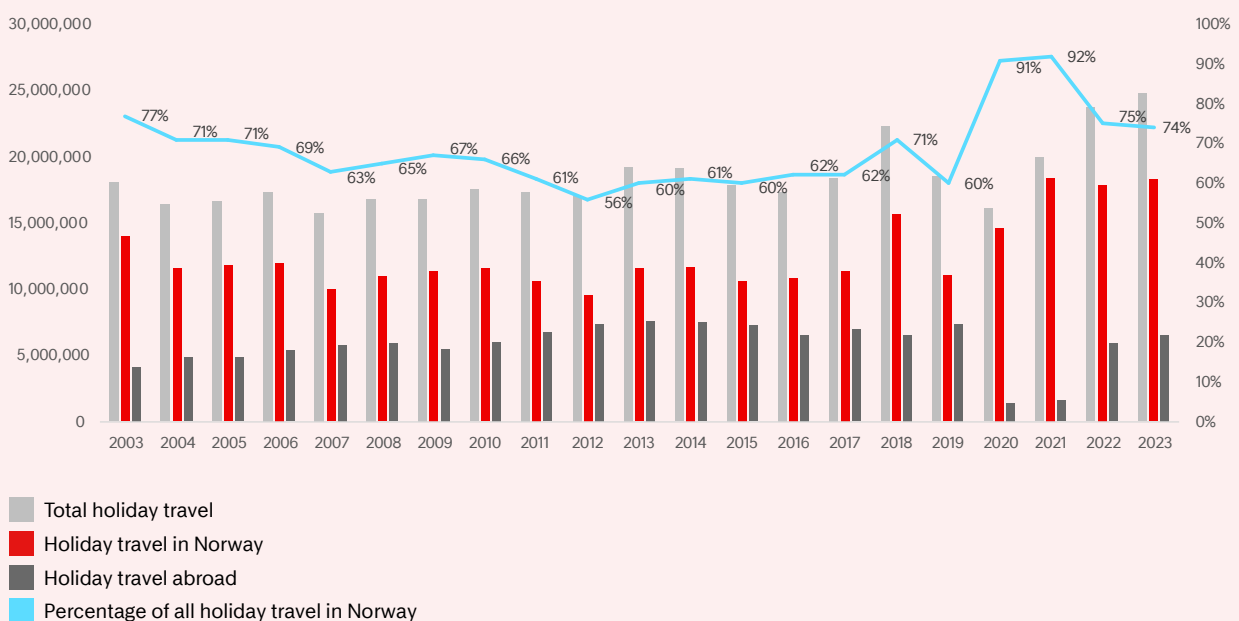
Norway still the top destination for Norwegians

In 2023, Norwegians took a total of 24.78 million holiday trips, both at home and abroad. This represents an increase of 34 per cent compared to 2019. The number of domestic holidays is almost at the level of the record year of 2021, when travel options were limited. From 2019 to 2023, the number of holiday trips has increased from 18.5 million to 24.8 million, an increase of 34 per cent, corresponding to 6.3 million trips. Of these seven million more are domestic trips, while overseas trips have decreased by 900,000.

Norwegians travelled more than in 2019, and a larger proportion of all holidays are domestic

Holiday and leisure travel

Share of holiday and leisure travel in Norway



Source: Tourism Survey, Statistics Norway

More of the holiday budget spent on domestic travel

For the first time in a normal year, Norwegians spent the majority of the holiday budget in their own country. Norwegians have always spent most of their holidays at home, either spending overnight stays at hotels, with friends or acquaintances, or in their own or a rent cabin. However, the majority of the holiday budget has traditionally been spent on overseas travel. This changed in 2023.

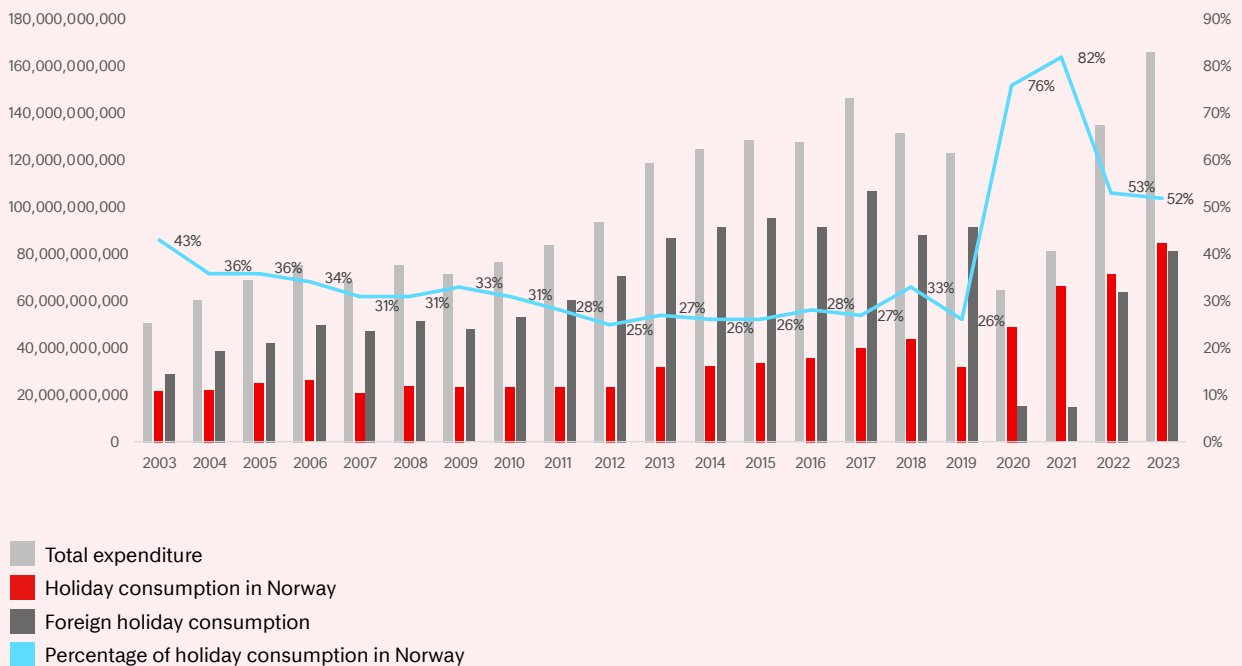
In 2019, 60 per cent of all holiday travel was domestic, while only 26 per cent of the holiday budget was spent in Norway. Now the proportion of domestic

travel has increased to 74 per cent, and for the first time, except for the pandemic years, Norwegians are spending a greater share of the holiday budget at home rather than abroad. In 2023, 54 per cent of the holiday budget was spent on holidays in Norway.

Norwegians spent a record of almost NOK 166 billion on holidays in 2023, an increase of NOK 42.6 billion from 2019. The amount spent on trips abroad is lower than in 2019, while expenditure on domestic holidays has increased by NOK 53 billion, from NOK 31.7 billion in 2019 to NOK 84.8 billion in 2023.

Holiday and leisure consumption

Proportion used in Norway



Source: Tourism Survey, Statistics Norway

09

Cruise tourism and Norway's market share



Number of cruise passengers in the world

In 2023, there were 31.7 million cruise passengers globally, according to figures from Cruise Lines International Association (CLIA). This represents an increase of seven per cent compared to 2019. Over the same period, growth in Norway was 61 per cent, with the number of cruise tourists increasing from 945,000 in 2019 to 1.5 million in 2023.

Biggest growth in North America

If we examine cruise traffic globally, the greatest growth was in North America, which with its 18.1 million cruise tourists accounts for over half of all cruise passengers, with a 57 per cent share. This is followed by Europe, which with 8.2 million passengers has a 26 per cent share. Asia, however, has not returned to its pre-pandemic levels in 2023, with the number of cruise passengers 37.7 per cent below 2019 levels.

While Norway’s share of international land-based tourism was at 0.5 per cent in 2023, our share of international cruise traffic increased to 4.8 per cent in the same year.

Global share	2019	2023	% change
World	29.7 million	31.7 million	6.8%
North America	15.4 million	18.1 million	17.5%
Europe	7.7 million	8.2 million	6.5%
Asia	3.7 million	2.3 million	-37.7%
Australia, New Zealand and the Pacific region	1.35 million	1.34 million	- 1%
South America	935,000	996,000	6.6%

Source: Cruise Lines International Association (CLIA)

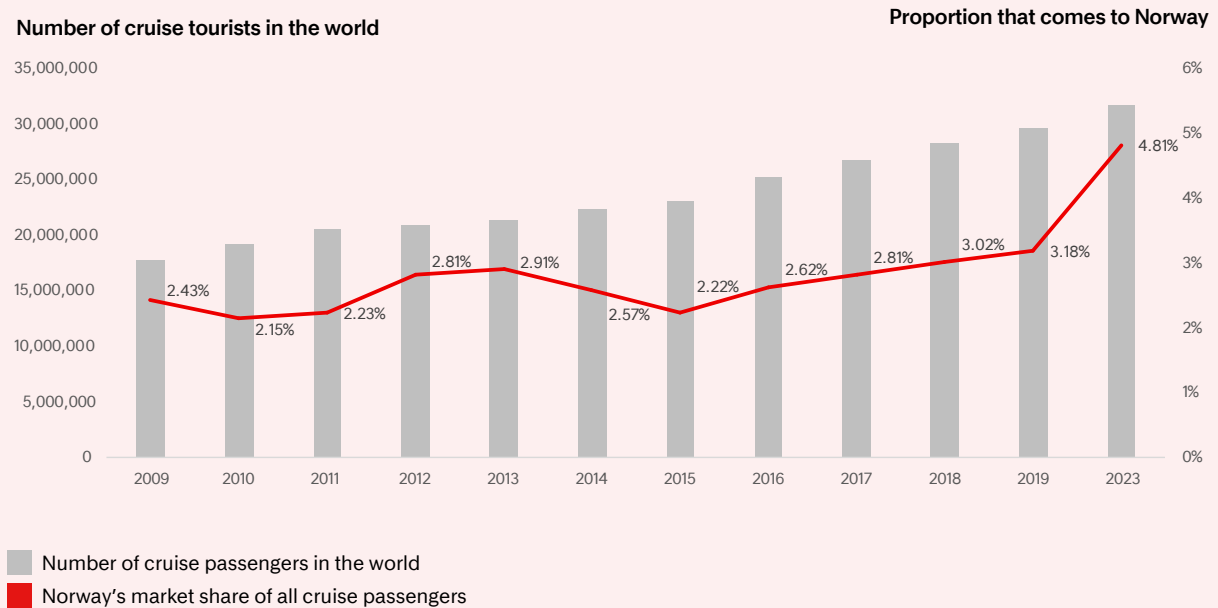
The development of cruise tourism in Norway

Norway's share of international cruise traffic is increasing. Even though cruise tourists are a small percentage of all holiday traffic in Norway, Norway's share of international cruise tourism is greater than our share of land-based tourism. While Norway's share of international land-based tourism was at 0.5 per cent in 2023, our share of international cruise traffic increased to 4.8 per cent in the same year.

cent on 2019. Over the same period, the number of cruise passengers increased from 945,000 in 2019 to 1.5 million in 2023, a growth of 61 per cent. This enormous growth has led to Norway's share of international cruise tourists increasing from 3.18 per cent to 4.81 per cent.

Even though there is growth in cruise activity in the shoulder and winter season, most cruise traffic comes in the summer.

Figures from Cruise Lines International Association (CLIA) show that in 2023 there were 31.7 million cruise passengers globally, an increase of seven per

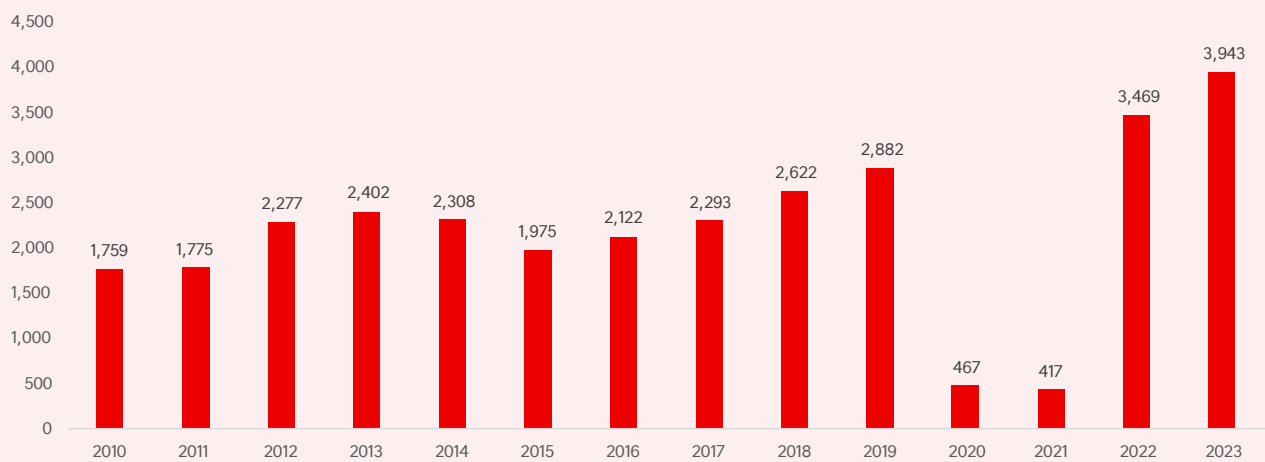


Source: Cruise Lines International Association (CLIA) and Innovation Norway

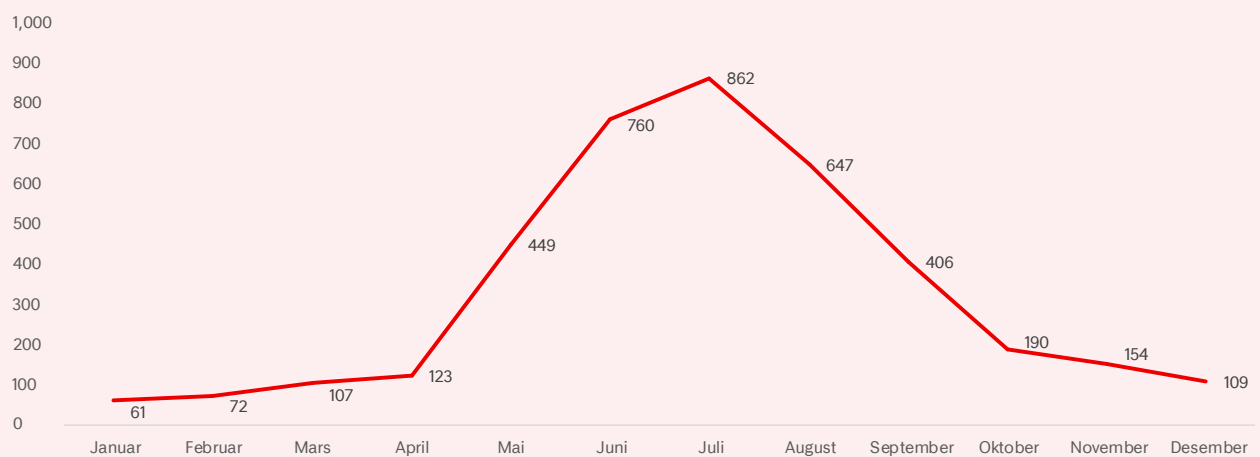
Number of port calls and distribution throughout the year

Over the course of 2023, 3,943 cruise ships anchored in one or more Norwegian ports. With the exception of the pandemic years of 2020 and 2021, there has been a steady increase in both port calls and cruise passengers since 2016. Cruise traffic in 2023 is twice as high as in 2016.

Number of port calls in Norway from 2010 to 2023



Distribution of the number of port calls per month



Source: Kystdatahuset service, Norwegian Coastal Administration

Passengers by port

Cruise passengers visited an average of four Norwegian ports, an increase on 2019 where the average was 3.5 ports.

Cruise traffic continues to increase in Norwegian ports, with Ålesund being the most popular.

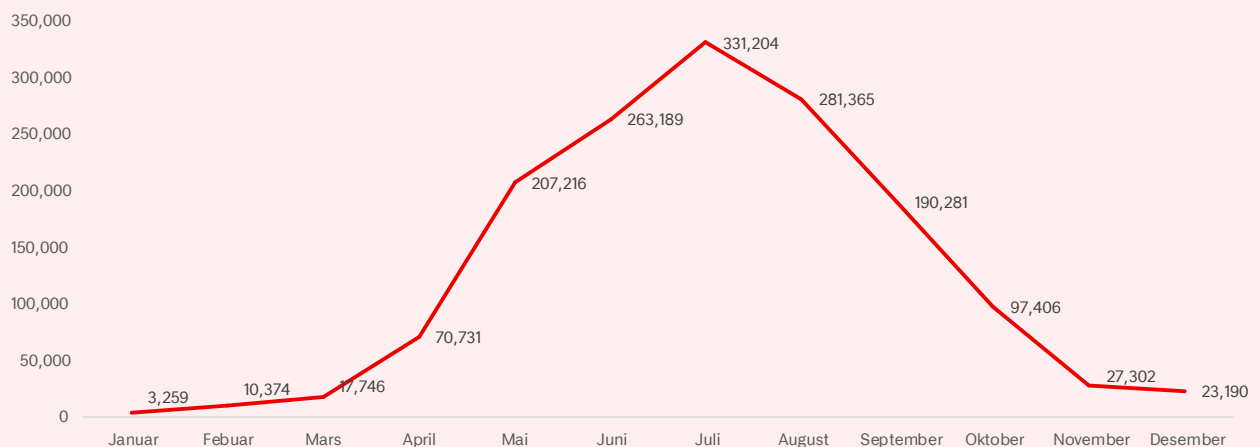
In total, 1,523,263 unique cruise passengers came to Norway, visiting an average of four Norwegian ports. This resulted in over 6.1 million recorded passengers in 2023. Passengers calling at multiple ports are counted again for each port they call at, which is comparable to land-based tourism where we count the number of overnight stays. It is worth noting that in a few cases, a cruise tourist may be counted by two different ports on the same day.

Place	Cruise passengers
Ålesund	655,033
Bergen	609,756
Stavanger	570,587
Geiranger	374,951
Haugesund	372,334
Olden	362,669
Kristiansand	357,498
Oslo	352,050
Hellesylt	280,550
Flåm	239,882

Cruise passengers per month

The cruise season has also become longer than before, though most come in the summer season, as the graph shows.

Cruisepassasjerer



Source: Kystdatahuset service, Norwegian Coastal Administration

Record number of Germans in Norway – both on land and at sea

Germany is Norway’s largest tourism market. In 2023, there was a significant increase of 486,000 more registered overnight stays from German tourists. There were also almost 353,000 more German cruise passengers.

In total, there were almost 705,000 German cruise passengers in Norway in 2023, twice that of 2019. In 2019, German cruise passengers accounted for 37 per cent of all cruise passengers, a share which has increased to 46 per cent. The number of cruise passengers is not only increasing, but the increase

from Germany is so high that they are also increasing their market share.

After Germany, the UK and the US are the largest cruise tourists to Norway. This is unchanged from 2019, and there is also good growth of 56 and 21 per cent respectively from 2019. Together, these three markets account for 77 per cent of all cruise tourists in 2023.

Nationalities with the most cruise passengers to Norway

Country	2019	2023	% change 2019-2023
Germany	351,980	704,891	100%
UK	209,060	325,594	56%
USA	117,388	141,601	21%
Italy	37,833	54,883	50%
The Netherlands	20,969	48,636	135%
Spain	37,610	46,760	24%
France	18,322	21,804	19%
Canada	20,703	20,190	-2%
Belgium	11,464	13,706	20%
Australia	17,224	12,790	-26%
Austria	11,029	10,320	-6%
Switzerland	9,406	9,977	6%
Other nationalities	82,229	110,111	34%
Total	944,944	1,523,263	61%

Source: Norwegian Coastal Administration

10

Event tourism



Cultural and sporting events play a crucial role for Norwegian tourism

Throughout the whole year, a broad range of events are held across the country, from small local events to major international festivals, concerts, religious ceremonies, marathons, as well as European and world championships in various sports.

Work has been carried out strategically to position Norway as an attractive host nation for such events. The purpose of Innovation Norway’s focus on events is to increase international sporting and cultural events in Norway, as well as further developing existing events.

According to Future Market Insights, the international event tourism market is growing at an annual rate of 4.1 per cent, and this growth is expected to increase to 4.3 per cent by 2034.

The Tourism Survey from Innovation Norway shows that events are an important motivating factor for tourists visiting Norway. Even though it is primarily Norwegians participating in events in Norway, the survey shows that one in four foreign visitors state attendance at an event as an important motivating factor for their visit.

Have you been, or will you be present or attend any of the following events on this trip in Norway?



Source: The Tourism Survey, Innovation Norway

Type of event our visitors attend

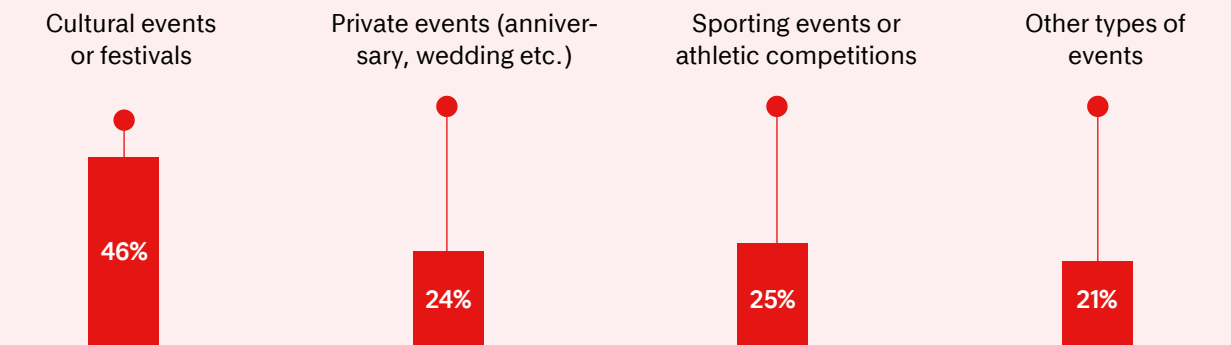
Cultural events and festivals at the top

If we look at the distribution by event type, cultural events and festivals are the most visited, followed by sporting events and athletics competitions. The distribution between the different events is

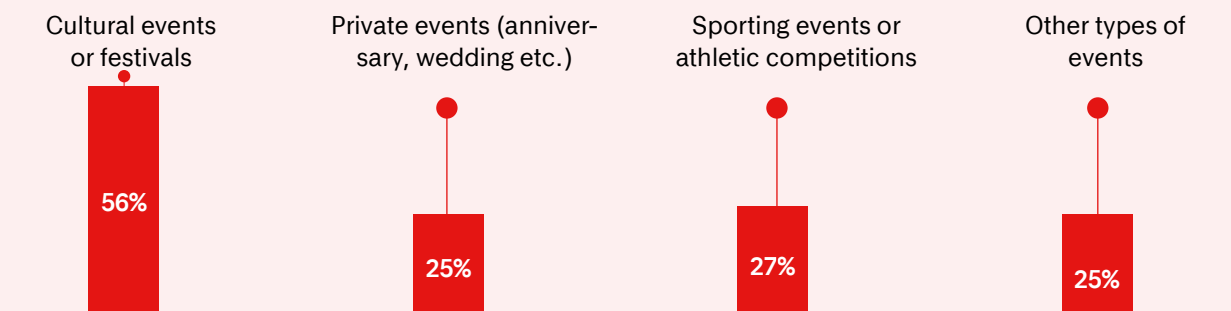
relatively equal among both Norwegian and foreign visitors. After cultural and sporting events, there are many who state that private events, such as marriages or anniversaries, as a motivation for their holiday.

Type of events on the holiday to Norway. Share of event tourists.

Norwegian event tourists



Foreign event tourists



Source: The Tourism Survey, Innovation Norway

11

International meetings/ conferences



In 2023, 294 conferences were held in Norway

As a part of Innovation Norway’s focus on tourism, the goal is to attract more international academic and research conferences. This contributes to economic growth, increased attractiveness for Norway as a destination, and promoting exports of Norwegian technology and expertise.

Most conferences were held in the five largest conference cities: Oslo, Bergen, Trondheim, Tromsø and Stavanger. These cities have the necessary infrastructure, such as direct flights, conference

centres and sufficient hotel capacity, which smaller locations often lack. This is also where the majority of universities, high schools and research institutes are located.

Few conferences in 2023

294 conferences were held in 2023, a decrease of 41 per cent on 2019 when there were 497 conferences. This development is not unique to Norway, but reflects a global trend, according to statistics from the Union of International Associations (UIA).

Development in the number of conferences in Norway 2019-2023

Bergen is the only conference city that had more conferences in 2023 compared to 2019. Oslo is in the top 21 in international rankings and 13th in Europe.



Source: Innovation Norway and the UIA (Union of International Associations)

Conferences as a focus area

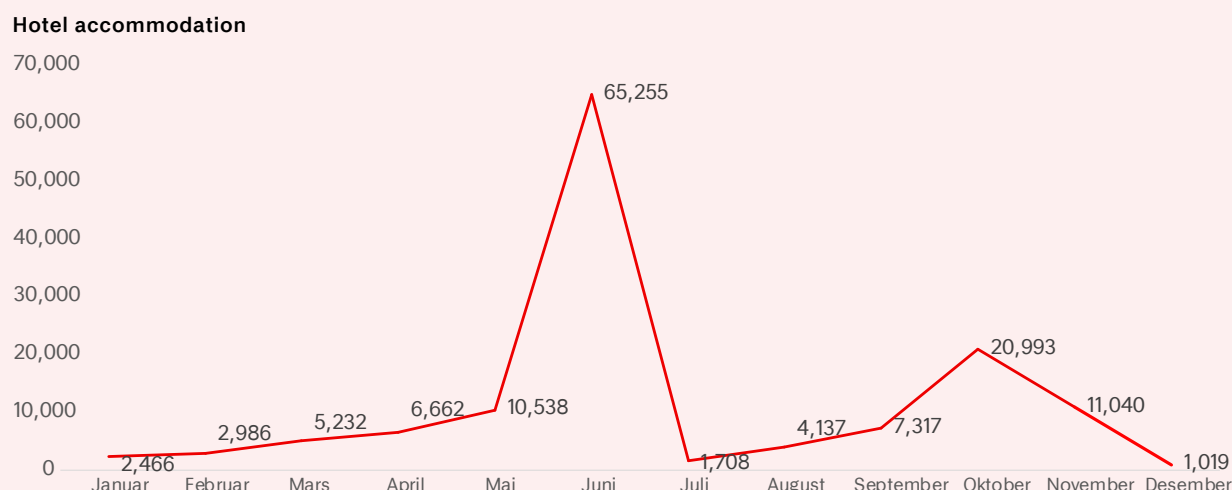
Innovation Norway has identified the most relevant professional areas that will be prioritised in the work of bringing more relevant conferences to the country.

These areas are:

- Clean energy
- Health and welfare
- The maritime industry
- Seafood and seafood production
- Bioeconomy
- Technology development

This priority is a result of already established Norwegian academic communities within private and public sector cooperation, including clusters and areas of opportunity. This is also based on the professional areas that the regions have highlighted as being important.

The distribution of conference-related overnight stays in hotels in 2023



The high number of conference-related overnight stays in June is due to Nor-Shipping which is held every other year.

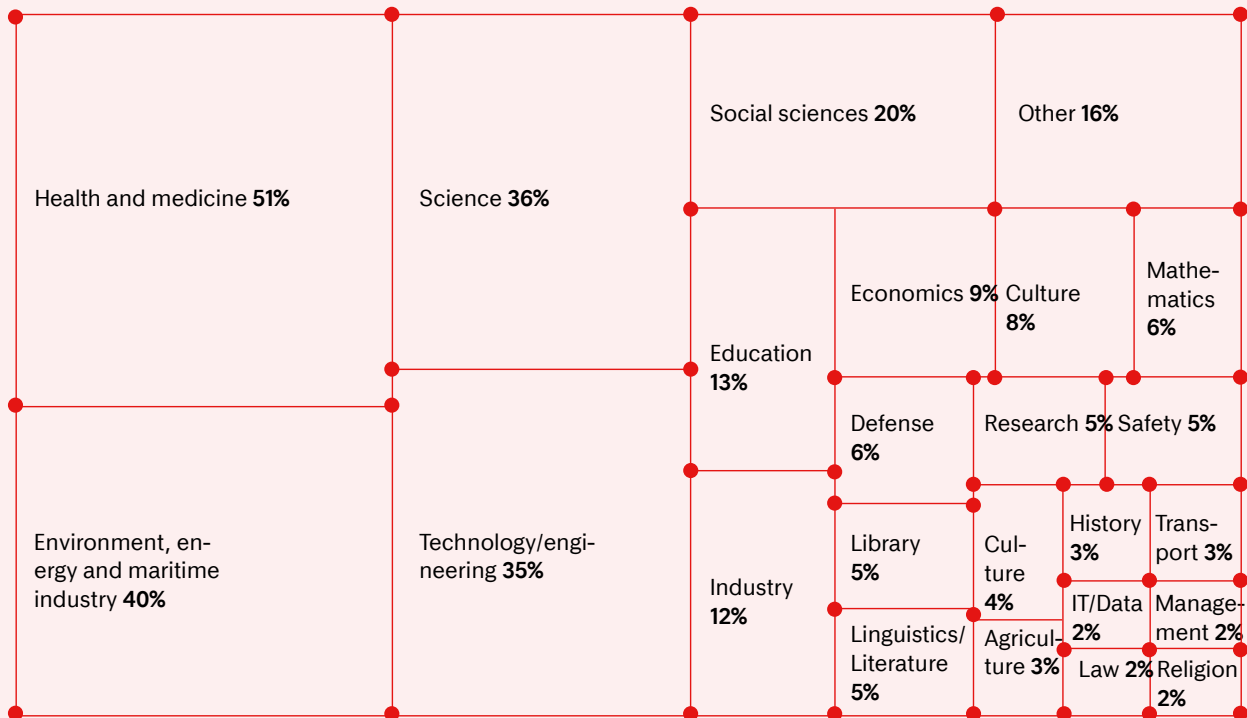
Source: Innovation Norway

Professional areas for conferences in Norway

In 2023, health and medicine were the dominant sector for conferences. The environment, energy and maritime industry followed with a total of 40 conferences. Furthermore, 36 science conferences were held and 35 for technology and engineering. These themes reflect major research areas connected to universities and other research and educational institutions where there is a large focus on the

development of new technology and the transfer of expertise.

Internationally leading conferences contribute to the visibility and stimulation of Norwegian academic communities, to innovation and development, and to the position of Norway as a leading and competent nation.



Source: Innovation Norway

Key facts about international conferences

- In 2023, we collected information on 294 international conferences. This is a decrease of 41 per cent from 2019 and 16 per cent from 2022.
- However, Norway is in 17th place in international rankings, which is a fall from 12th place in 2022. In a European context, Norway was in 11th place in 2023.
- Norway is ahead of Denmark, in 28th place and Sweden in 19th place. In international rankings, Belgium, the US and Japan held the top spots.



Innovation Norway in brief

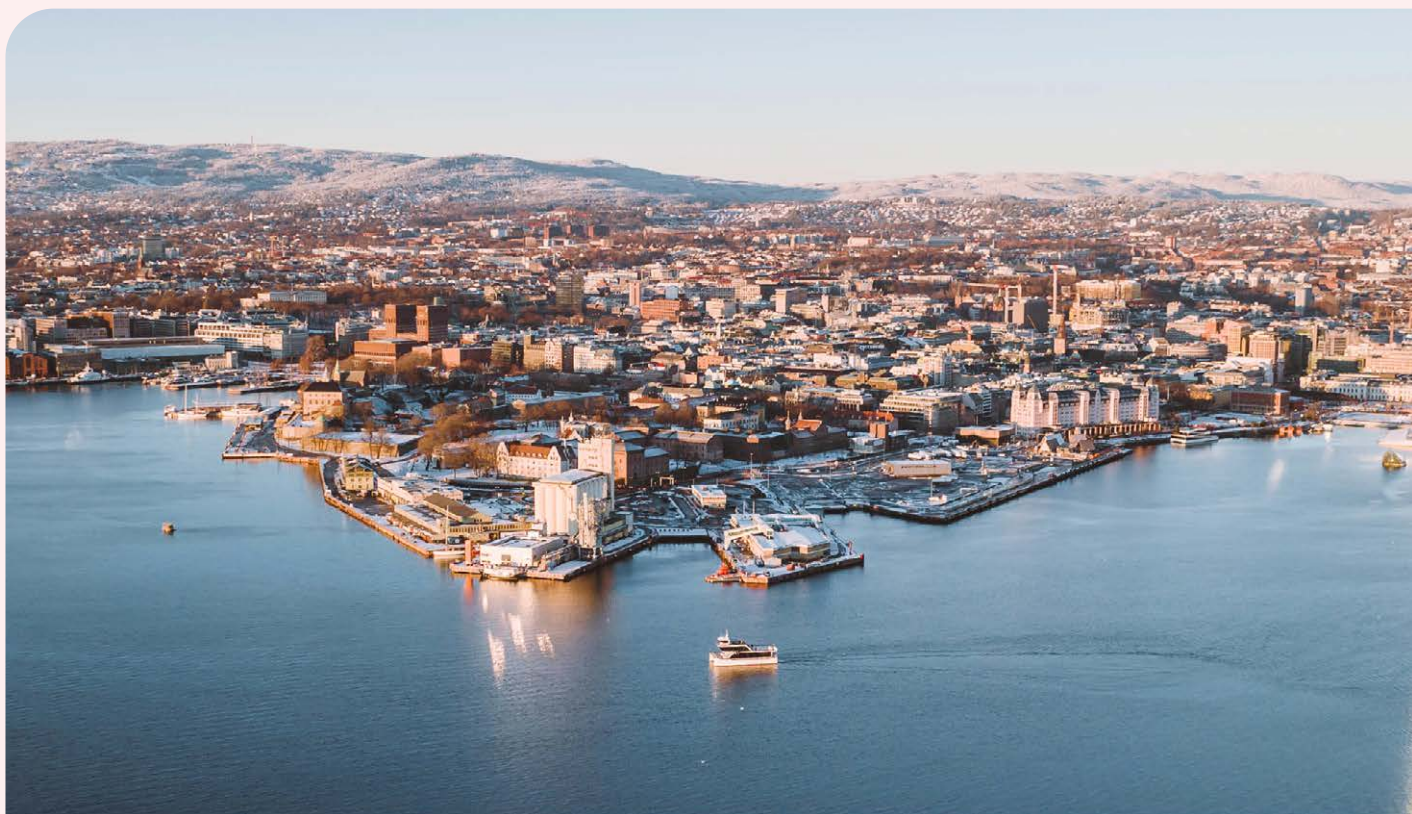
Innovation Norway's objective is to be the Norwegian government's and the county authorities' main instrument for achieving value-creating business development throughout the country

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

Innovation Norway has many clients, and 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, complex social mandate. The core of this work is to contribute towards value creation by creating profitable enterprises and socio-economically profitable business development throughout the country. Innovation

Norway's measures and services are designed 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 provides 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 per cent) and the regional authorities (49 per cent).



Definitions

Arrival A holiday or business trip with a minimum of one overnight stay.

Brand Tracker Innovation Norway conducts weekly surveys 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. The survey also indicates whether the marketing work being conducted is providing the desired results.

Commercial overnight stays Overnight stays at hotels, campsites, cabin villages, and hostels.

Competitive Price Index A nominally effective exchange rate calculated on the basis of the exchange rate of the Norwegian Krone against Norway's 28 most important trade partners.

Daily expenditure The average amount of Krone spent per overnight stay by tourists in Norway.

Foreigner A person who lives outside of Norway.

NPS: Net Promoter Score (NPS): Is a tool for gauging one type of loyalty, and in this context it specifies the percentage of tourists who would recommend the area as a holiday destination. NPS is calculated on the basis of the following question: "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 enter a score of 0 to 6 are described as being critics, those who enter a score of 7 or 8 are described as being passive, and those who enter a score of 9 or 10 are described as being ambassadors. The NPS value is defined as the percentage of tourists who are ambassadors, minus the percentage of critics. i.e. $NPS = \% \text{ ambassadors} - \% \text{ critics}$.

Summer season The period covering May to August.

The Tourism Survey Innovation Norway conducts a year-round nationwide survey where Norwegian and foreign leisure and holiday tourists, together with business travellers, are interviewed at tourist attractions, ski resorts, ports, airports, etc.

Tourism Satellite Accounts

The purpose of the Tourism Satellite Account is to describe the economic impact of tourism in a way that is comparable and consistent with other parts of the economy described in the national accounts. The Tourism Satellite Account forms an integral part of the annual national accounts and is compiled by Statistics Norway.

Tourist arrivals Includes figures for holiday, leisure, and business trips with a minimum of one overnight stay.

Tourist/tourism Activities of people travelling and staying in places outside of their ordinary place of residence, regardless of purpose, for less than a year. Individuals who are employed in the country they are visiting fall outside the scope of this definition.

Travel party This refers to people travelling together with shared finances. The Travel SurveyA sample survey conducted by Statistics Norway, the purpose of which is to map Norwegians' travel habits domestically and abroad.

Winter season The period covering January to April.

Key Figures for Norwegian Travel and Tourism

2023



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