

# Foreign Northern Lights Tourists 2024



# Northern Lights Tourism Winter 2024

**The purpose of this report is to provide insight into Norwegian Northern Lights tourism during the 2024 winter season.**

Northern Lights tourism in Northern Norway experiences strong growth. Booking.com indicates that holidays to experience the dark nighttime sky will be the number one trend for 2025. Stakeholders report strong growth and maximum capacity has been exceeded at the airport in Tromsø. International air traffic at Tromsø Airport increased by 133 per cent during the first four months of 2024.

Tourists visit Northern Norway from large parts of the world and this report presents an overview of what they want to experience, how much money they spend, how long they stay and whether they are satisfied with their experiences in Norway.

The tourism survey is an interview survey conducted throughout Norway all year round. The interviews are conducted by Norstat and the report has been drawn up by Epinion and Gyger in close collaboration with Innovation Norway. The report looks at Northern Lights tourism during the winter of 2024 through eight different topics.

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# Summary of findings

## Northern Lights and culture go hand in hand

Tourists visit Northern Norway to experience the Northern Lights, as they are spectacular, new and exciting.  
65 per cent are visiting Norway for the first time and want to do and experience a lot during their holidays.

9 in 10 want to experience both nature and cultural experiences. A large majority (71%) participate in organised outdoor activities/activities with a guide.

Tourists want to get to know places, enjoy culinary experiences and purchase local products during their holidays.

## Gold cards on Northern Lights holidays

Tourists spend a lot of money on their Northern Lights holidays, 3 in 10 spend more than NOK 3,000 per day.

The average consumption exceeds NOK 2,700 and tourists over the age of 50 years have the highest expenditure.

4 in 10 have purchased a package holiday. Those who have purchased package holidays spend more money both per day and on their holidays overall. The vast majority travel to Norway by air and 1 in 3 also travel by air domestically within Norway.

## Huge volume growth

The Northern Lights are attracting more and more international visitors to Northern Norway. The number of overnight stays during the Northern Lights season (October-April) has more than doubled since the pandemic (from 2018/2019).

Figures from Eurostat show that the number of overnight stays reported via Airbnb, Booking.com, Tripadvisor and Expedia Group has tripled since the 2018/2019 season. In the same period, Statistics Norway recorded a growth of 65 per cent at hotels, campsites and cabin clusters in Northern Norway.

## Ambassadors for Norway

Northern Lights tourists are ambassadors for Norway. A majority gave a score of 10 out of 10 when asked whether they would recommend Norway as a destination. NPS is 77, which is considerably higher than for other winter tourists.

Many tourists originate from overseas markets, the UK and Southern Europe. These tourists have a higher willingness to recommend and are more satisfied with their holidays, including when it comes to other types of holidays in Norway. Nevertheless, there is still room for improvement, especially when it comes to culinary experiences and access to local products that tourists can purchase before they go home.





# Topic 1:

## **Foreign Northern Lights tourists – an overview**

Definition of a Northern Lights tourist  
and an overview of the  
characteristics of such tourists.

## Northern Lights tourists

Tourists who visit Norway and want to experience the Northern Lights do not only visit Northern Norway. They also visit other parts of the country. In order to analyse “Northern Lights tourists”, tourists have been defined as having the intention to experience the Northern Lights and having had at least one overnight stay in Northern Norway and/or at Hurtigruten/Havila.

This definition is in line with the manner in which Northern Lights tourists have been defined previously and makes it possible to compare the results from the 2024 winter season with corresponding figures for 2023 and 2019.



*Can you go into more detail regarding the activities you have done or plan to do?*

Experiencing the  
Northern Lights

Northern  
Lights safari

### Northern Lights tourists in Northern Norway

A Northern Lights tourist in Norway is defined as a holidaymaker who meets both of the following criteria:

- 1) Have responded that they either want to experience the Northern Lights and/or participate in Northern Lights safaris
- 2) Have at least one overnight stay in Northern Norway or have stayed on Hurtigruten/Havila overnight and have at least one overnight stay on land.

Topic 1: Foreign Northern Lights tourists – an overview

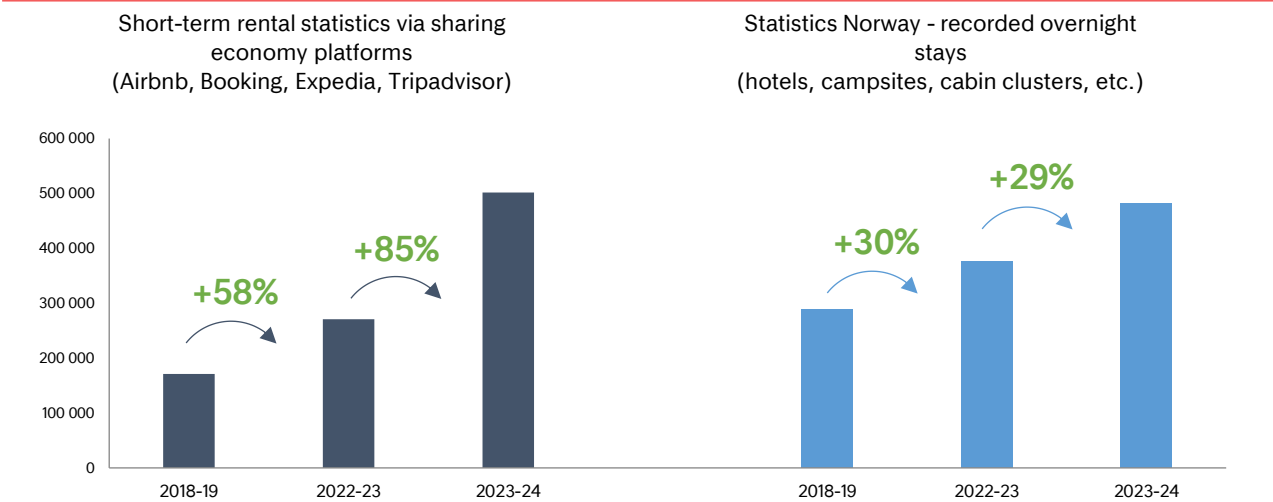
# Huge growth in Northern Lights tourists

In this report, we take a look at the Northern Lights tourists who visited Norway during the January to April period in 2024. The Northern Lights season starts in autumn and lasts for the entire winter season. Volume growth, measured by the number of guest nights, has been very high both during the autumn season (October-December) and the winter/spring season (January-April).

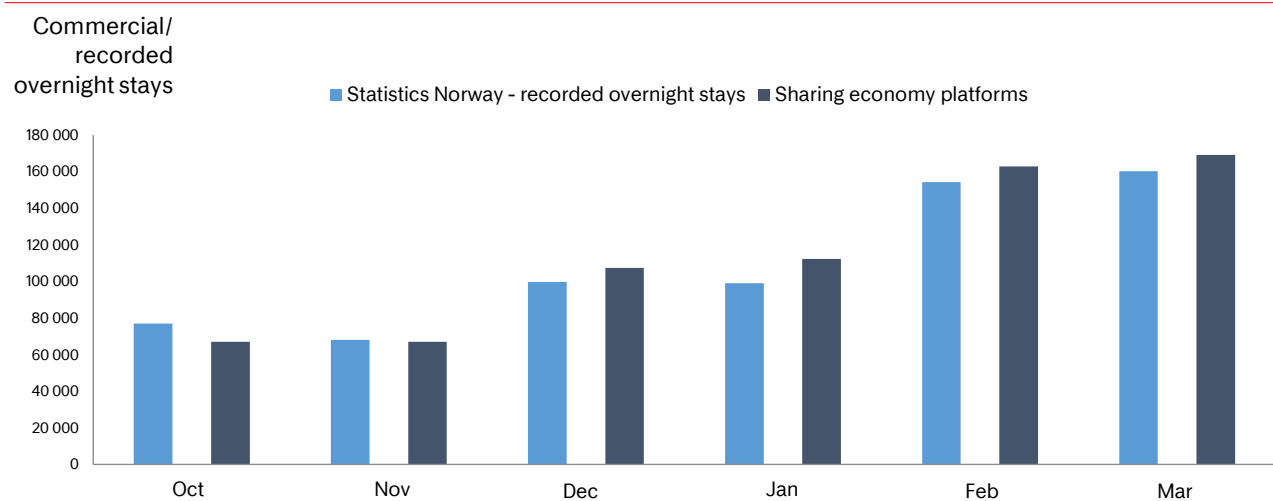
Statistics Norway produces statistics on commercial guest nights based on reports from hotels, campsites, cabin clusters and youth hostels (SSB in the graph). Additionally, experimental statistics are produced by Eurostat based on data collected from major international distributors/intermediaries (Airbnb, Booking.com, Tripadvisor and Expedia Group). These statistics are considered experimental as there is a need for further quality checks to ensure that guest nights are not counted twice in both national statistics and statistics from Eurostat. This means that guest nights reported to Statistics Norway via hotels, campsites or cabin clusters will also be reported by the intermediaries. When these numbers are added together, as we do here, they may be too high.

Despite these reservations, there has undoubtedly been strong growth in overnight stays in Northern Norway during the Northern Lights season. Growth is significantly stronger for guest nights reported via the large international stakeholders than guest nights reported to Statistics Norway in the ordinary manner. In the 2023/2024 season, more international guest nights were reported for the first time in the international statistics from Eurostat (743,391) than via Statistics Norway (727,306). The formidable growth also means strong growth in Northern Lights tourists' total expenditure.

## Distribution of international overnight stays in Northern Norway during the 2018/2019 to 2023/2024 Northern Lights seasons



## Distribution of registered international guest nights in Northern Norway during the 2023/2024 Northern Lights season



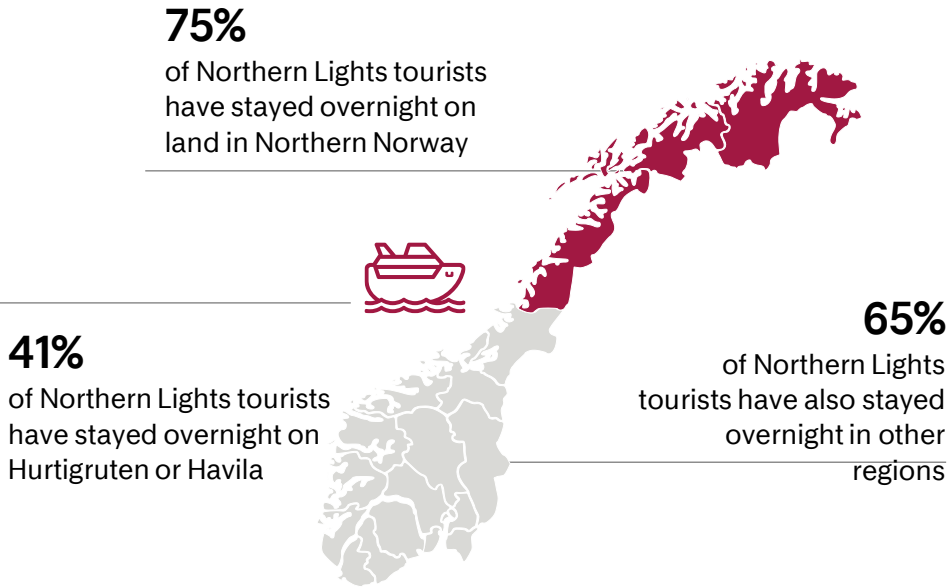
Source: Statistics Norway's accommodation statistics and cabin rental statistics.  
Source: Eurostat, Overnight stays via international sharing economy platforms  
Note: Statistics Norway's accommodation statistics and the cabin rental statistics include both holidaymakers and business travel.

Topic 1: Foreign Northern Lights tourists – an overview

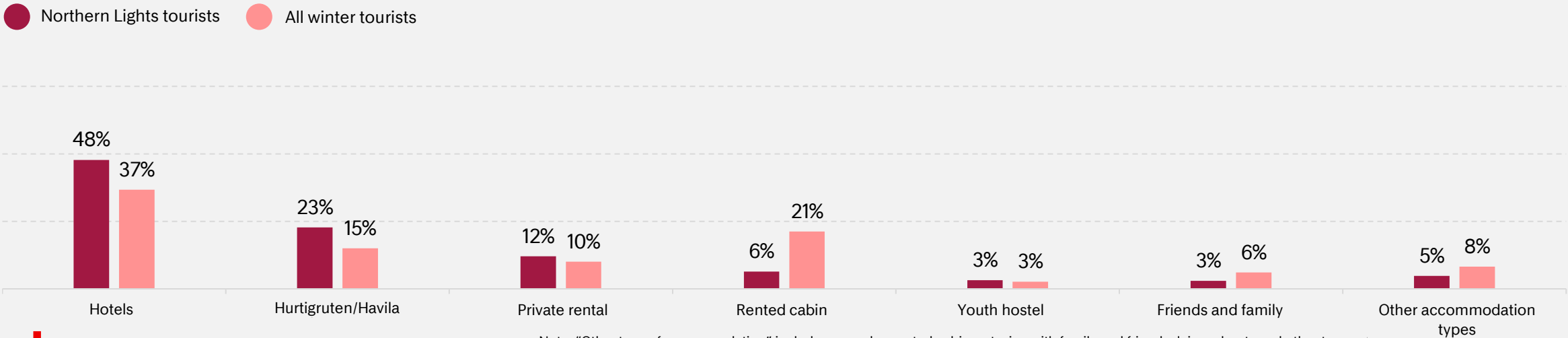
Accommodation

The vast majority of Northern Lights tourists visited Northern Norway during their holidays. No less than 65 per cent have also stayed overnight in other regions during their holidays. An average Northern Lights tourist has nearly 10 overnight stays during their holiday and more than 6 in 10 are visiting Norway for the first time. This suggests that many tourists take the opportunity to experience more than the Northern Lights when they are in Norway.

More than 60 per cent of overnight stays take place at hotels or Hurtigruten/Havila. 18 per cent have rented privately, but this accounts for 12 per cent of all overnight stays. Hurtigruten/Havila is most used by those in the 60+ age range and 1 in 3 overnight stays for those under 30 years of age are private or at cabins.



Distribution of tourists' overnight stays by accommodation type



Note: "Other type of accommodation" includes owned or rented cabins, staying with family and friends, leisure boats and other types of accommodation.

## Characteristics of foreign Northern Lights tourists

65 per cent of Northern Lights tourists are visiting Norway for the first time and participate in many different types of activities and experiences. The majority agree that they want to experience the spectacular nature.

There are many adult couples on Northern Lights holidays, more than half are travelling only with their partner and 2 in 5 are over 50 years of age. Adult couples largely stay at hotels or travel on Hurtigruten/Havila.

Northern Lights tourists spend more money than the average tourist visiting Norway. A total of 3 in 10 have a daily expenditure exceeding NOK 3,000 during their holidays.

Northern Lights tourists are not solely made up by adult couples, the group also includes young people travelling with friends, particularly from Asia, the USA and Southern Europe. Young people are interested in adrenaline and excitement and more inclined to participate in skiing activities such as alpine skiing, cross-country skiing, summit ski trips or longer hikes to known nature attractions.



Northern Lights tourists want to experience **spectacular nature** and **natural phenomena**



Northern Lights tourists **experience a lot** and **participate in a multitude of activities** during their holidays in Norway



Half of them researched **sustainability** when planning their trip to Norway



**3 in 10** have a **daily expenditure exceeding NOK 3,000** during their holidays



**More than half** of Northern Light tourists **travel with their spouse/partner** only



A majority of Northern Lights tourists **respond that they are very likely (10 out of 10)** to **recommend Norway** as a destination.



**2 in 5** Northern Light tourists are **over 50 years of age**



**65%** are visiting **Norway** for the first time



**9 in 10** want to experience both **nature and cultural experiences** during their holidays



**2 in 5** have been on a **cruise** in Norway during this trip



**The foreign Northern Lights tourist**



# Northern Lights tourists over time

The willingness to recommend Norway as a destination (NPS) has reached new heights. Northern Lights tourists have been consistently more satisfied with most things during this winter season. It is particularly those over the age of 50 who increase NPS.

Daily expenditure is relatively stable, tourists get more for foreign currency and increasingly felt that prices were consistent with quality. They also stay one more day, which contributes to an increase in total expenditure per person.

## Characteristics



**2.8 / 2.8 / 3.7**  
Average number of travelling companions\*



**9.5 / 9.2 / 9.2**  
Average number of overnight stays in Norway



**77 / 71 / 73**  
NPS\*\*\*



**NOK 2,795 / NOK 2,615 / NOK 2,240**  
Average daily expenditure during their holiday in Norway\*\*



**29% / 24% / 12%**  
Very satisfied that prices were consistent with quality



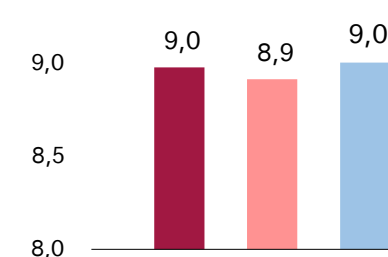
**52% / 45% / 42%**  
Very satisfied with the opportunity to experience local culture and lifestyle



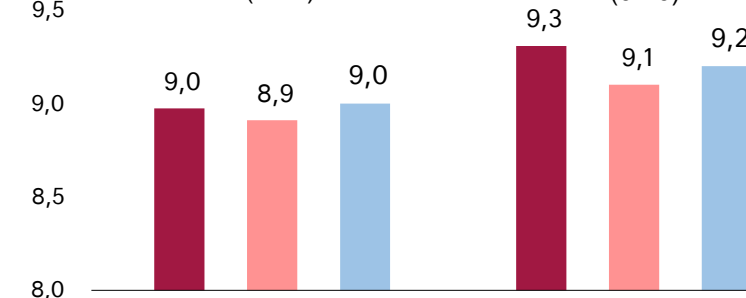
**68% / 62% / 68%**  
Very satisfied with accommodating locals



Average overall satisfaction (0-10)



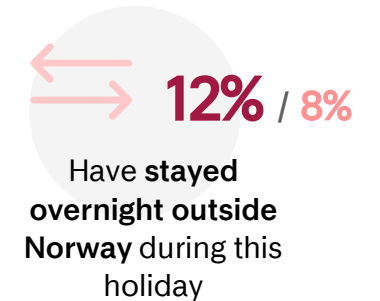
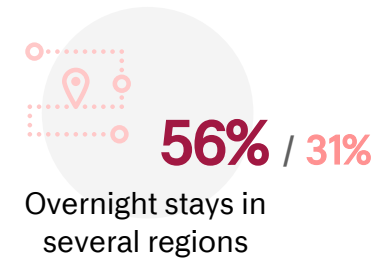
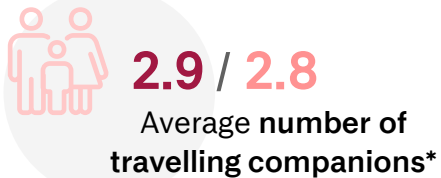
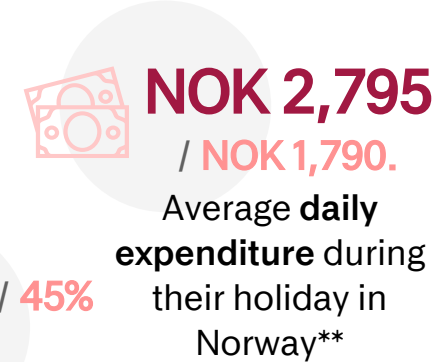
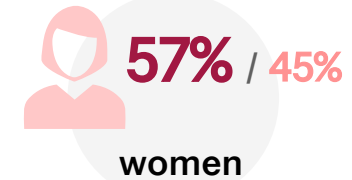
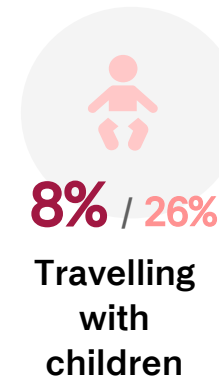
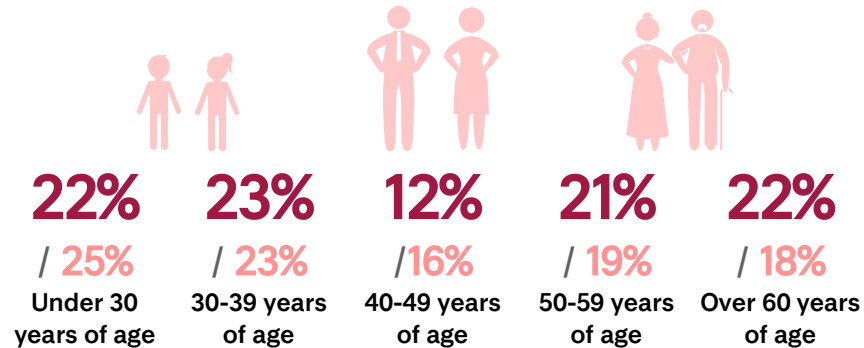
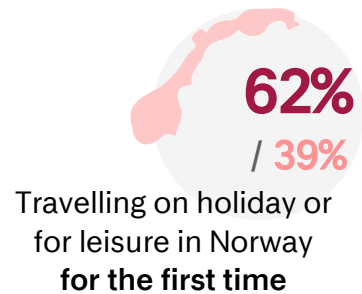
Average willingness to recommend (0-10)



## Topic 1: Foreign Northern lights tourists – an overview

# Who are Northern Lights tourists compared to all other winter tourists?

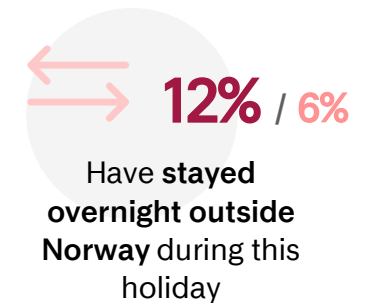
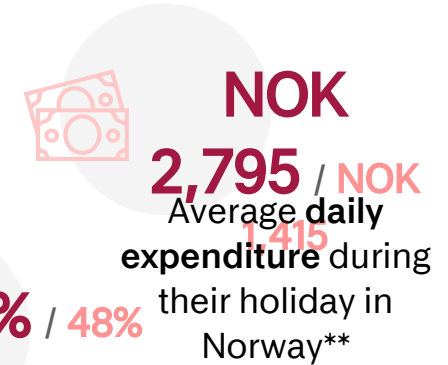
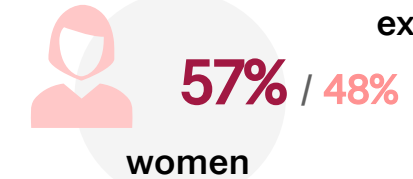
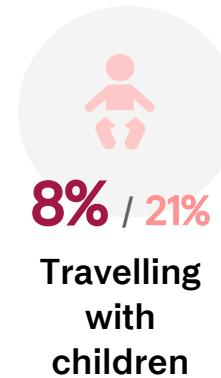
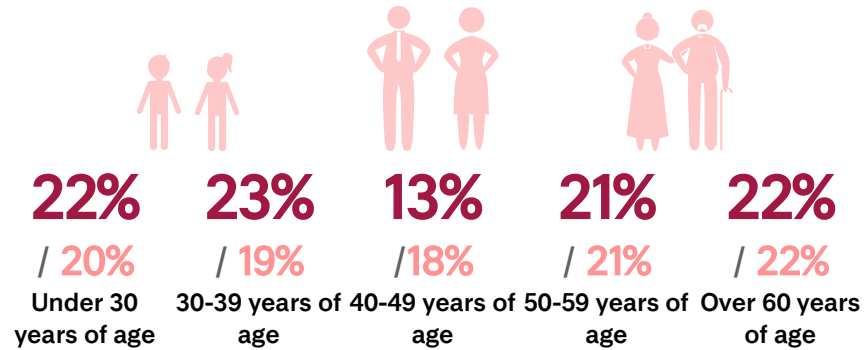
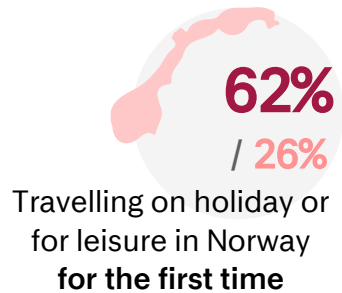
● Northern Lights tourists / ● All winter tourists



## Topic 1: Foreign Northern lights tourists – an overview

# Who are Northern Lights tourists compared to tourists wanting to experience the midnight sun?

● Northern Lights tourists / ● Tourists wanting to experience the midnight sun







## Topic 2:

# A market overview

Characteristics of tourists from selected markets – the USA, Australia and Canada, the UK, Southern Europe, Germany and Asia.

## Topic 2: A market overview

# Northern Lights tourists from the USA, Australia and Canada

They are primarily interested in experiencing spectacular nature and exploring something new and exciting, both nature and cultural experiences.

8 in 10 are visiting Norway for the first time. Nearly 4 in 10 are over 60 years of age and "all" arrive by air, 4 in 10 also travel by air domestically within Norway. They are more likely to visit Western Norway and Oslo.

They will stay at hotels and on Hurtigruten/Havila.

They are excellent ambassadors for Norway, with an NPS of 82. They are more satisfied with most things than the average tourist. It is worth noting that only half are very satisfied with the food at eateries.

They have a high daily expenditure and a long stay and spend a lot of money in Norway.

\* Travel companions refer to the total number of people travelling together on this holiday.

\*\* Average daily expenditure is rounded to the closest NOK 5.

\*\*\*See definition of NPS in the Appendix.

### Characteristics



**2.5 / 2.8**

Average number of travelling companions\*



**12.7 / 9.5**

Average number of overnight stays in Norway



**82/77**

NPS\*\*\*



**51.1 years / 44.9 years**

Average age



**NOK 3,040 / NOK 2,795.**

Average **daily expenditure** during their holiday in Norway\*\*



**55% / 44%**

I want to experience cold weather, snow and winter



**30% / 40%**

Have purchased all or part of the trip as a package holiday



**94% / 62%**

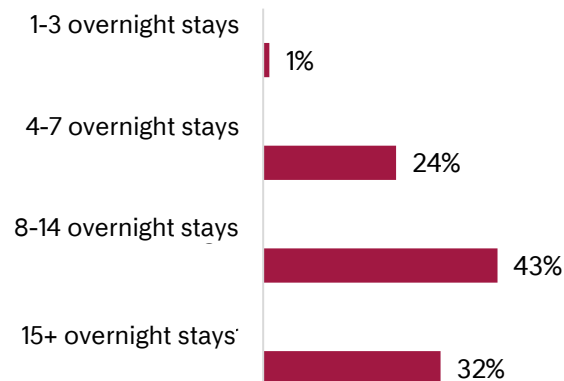
Experiencing history and cultural heritage



**35% / 50%**

Have looked into sustainability when planning the holiday

### Length of stay for Northern Lights tourists from the USA, Australia and Canada



# Northern Lights tourists from Germany

German tourists in search of the Northern Lights differ significantly from German summer tourists. They spend considerably more money, are more likely to purchase package holidays, they are younger and 75 per cent arrive in Norway by air.

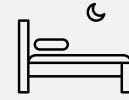
At the same time, they share a yearning for nature experiences, the fjords, peace and quiet with the summer tourists. 4 in 5 want to go on hikes and 67 per cent want to experience a snowy winter, while 29 per cent want to experience saunas.

Just under 4 in 10 have a daily expenditure exceeding NOK 3,000, which means that German winter tourists have a considerably higher daily expenditure than German summer tourists.

## Characteristics



**3.0 / 2.8**  
Average number  
of travelling  
companions\*



**8.6 / 9.5**  
Average  
number of  
overnight stays  
in Norway



**86 / 77**  
NPS\*\*\*



**48.4 years /  
44.9 years**  
Average age



**NOK 3,280 /  
NOK 2,795.**  
Average daily expenditure\*\*  
during their holiday  
in Norway



**44% / 40%**  
Have purchased all  
or part of the trip as  
a package holiday



**69% / 51%**  
I am looking for  
peace and quiet

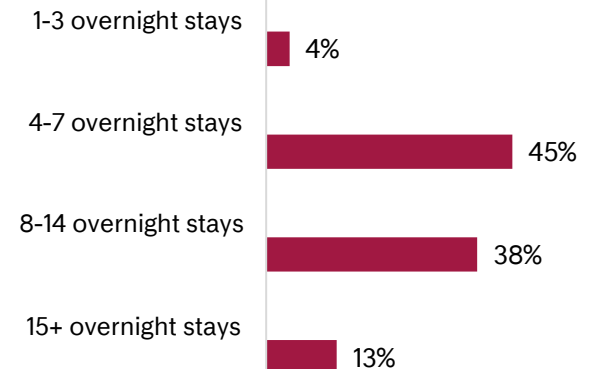


**73% / 64%**  
Hiking/walking



**45% / 50%**  
Have looked into  
sustainability  
when planning  
the holiday

## Length of stay for Northern Lights tourists from Germany





# Northern Lights tourists from the UK

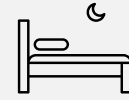
British Northern Lights tourists are older than the average, nearly half are between 50 and 70 years of age and 67 per cent travel with their spouse/partner.

Half purchased the trip as part of a package holiday that includes transport to and within Norway, accommodation and meals for the vast majority. Activities and excursions are also included for more than half of those purchasing package holidays. Northern Lights tourists from the UK purchase all-inclusive packages.

## Characteristics



**2.4 / 2.8**  
Average number  
of travelling  
companions\*



**8.1 / 9.5**  
Average  
number of  
overnight stays  
in Norway



**85 / 77**  
NPS\*\*\*



**51.5 years /  
44.9 years**  
Average age



**NOK 3,610 /  
NOK 2,795.**  
Average daily expenditure\*\*  
during their holiday  
in Norway



**51% / 40%**  
Have purchased all  
or part of the trip as  
a package holiday



**62% / 44%**  
I want to  
experience cold  
weather, snow and  
winter

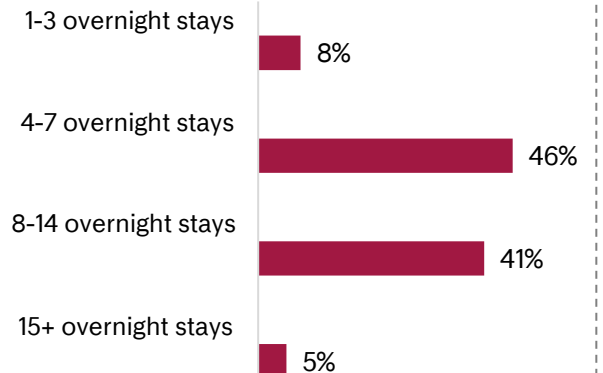


**68% / 62%**  
Experiencing history  
and cultural heritage



**61% / 50%**  
Have looked into  
sustainability  
when planning  
the holiday

## Length of stay for Northern Lights tourists from Germany



# Northern Lights tourists from Southern Europe

Visitors from Southern Europe are young, with an average age below 40 years. 1 in 3 travel with friends.

Southern Europeans are more likely to privately rent (21%), via AirBnB or similar. Regardless of market, young people are more likely to privately rent during their holidays. 39 per cent of those under 30 and 28 per cent of those between 30 and 40 have privately rented accommodation during their holidays. 72 per cent of overnight stays take place in Northern Norway.

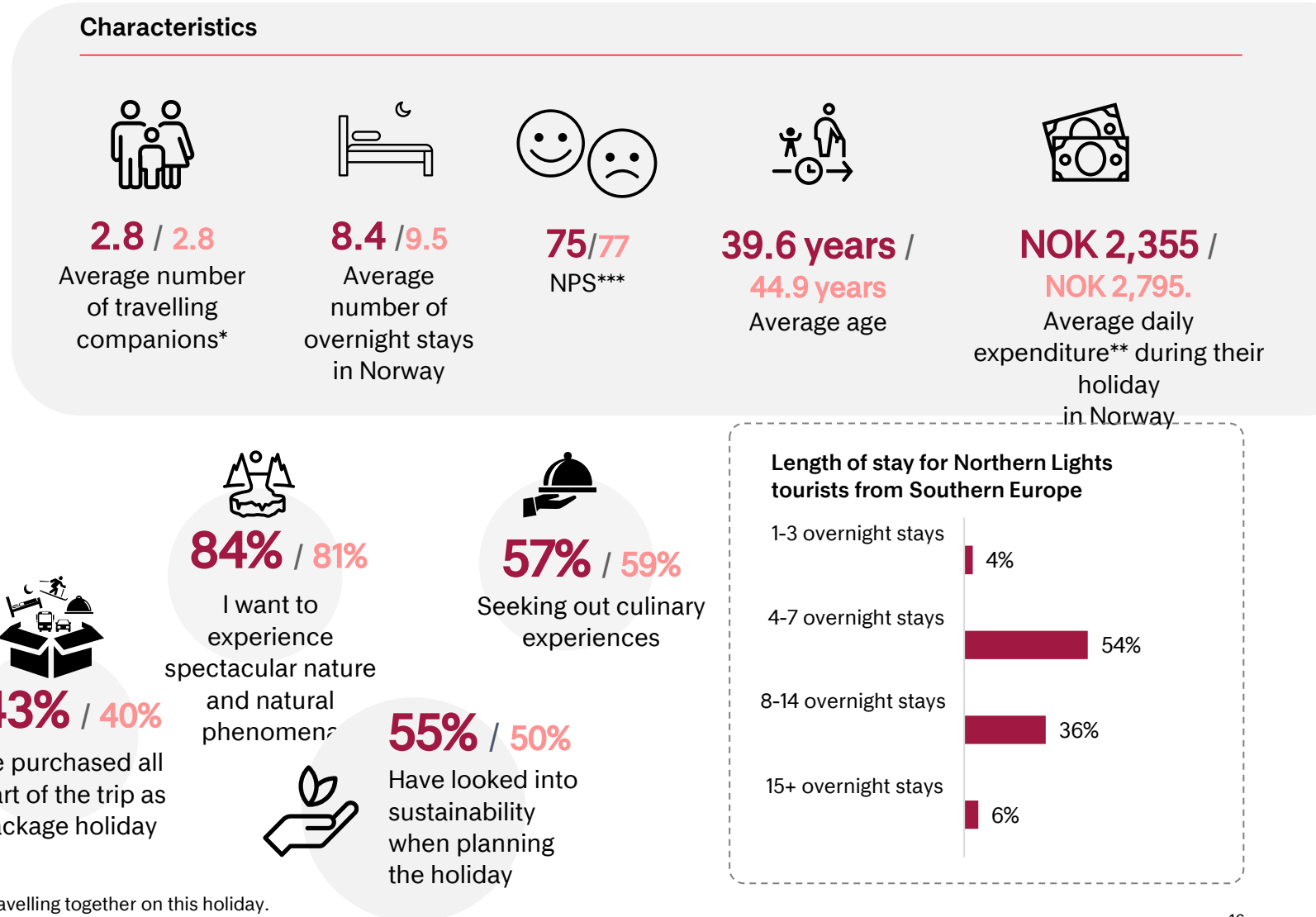
They are more interested in cultivating their own interests. 16 per cent want the nature experience to provide an adrenaline rush and excitement and plan to participate in skiing activities during their holidays.

Southern Europeans are consistently less satisfied with culinary experiences, museums and cultural offerings and the consistency between prices and quality.

\* Travel companions refer to the total number of people travelling together on this holiday.

\*\* Average expenditure is rounded to the closest NOK 5.

\*\*\*See definition of NPS in the Appendix.



# Northern Lights tourists from Asia

3 in 4 Asian visitors are under 40 years of age. They are more interested in a varied range of activities but considerably less interested in physical activity. They want to experience the Northern Lights, mountains and a snowy winter.

9 in 10 want to go sightseeing and 6 in 10 are interested in shopping and excellent shopping opportunities.

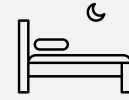
They are considerably more interested in sustainability than the average and 68 per cent say that they looked into this when planning their holidays.

73 per cent are visiting Norway for the first time, the majority of overnight stays are at hotels and 2 in 10 have also stayed overnight in other countries during this holiday.

## Characteristics



**2.5 / 2.8**  
Average number  
of travelling  
companions\*



**7.9 / 9.5**  
Average  
number of  
overnight stays  
in Norway



**74/77**  
NPS\*\*\*



**37.1 years /  
44.9 years**  
Average age



**NOK 3,050 /  
NOK 2,795.**  
Average daily expenditure\*\*  
during their holiday  
in Norway



**38% / 40%**  
Have purchased all  
or part of the trip as  
a package holiday



**81% / 81%**  
I want to  
experience  
spectacular nature  
and natural  
phenomena

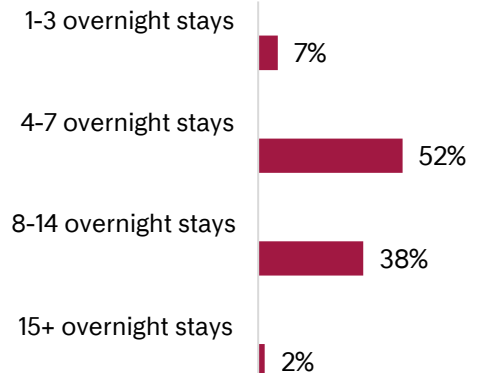


**68% / 50%**  
Have looked into  
sustainability  
when planning  
the holiday



**71% / 59%**  
Experiencing  
attractions and sights

## Length of stay for Northern Lights Tourists from Asia







## Topic 3: **Nature experiences and outdoor activities**

Overview of the nature experiences and outdoor activities tourists plan and participate in during a Northern Lights holiday and the motivations for seeking out such experiences.

### Topic 3: Nature experiences and outdoor activities

## Northern Lights tourists want to experience spectacular nature and natural phenomena

65% of Northern Lights tourists are visiting Norway for the first time. The vast majority want to experience the spectacular nature. The Northern Lights, winter, cold and snow constitute new experiences in themselves, but Northern Lights tourists want to get to know the places they visit, try new activities and explore culture and history.

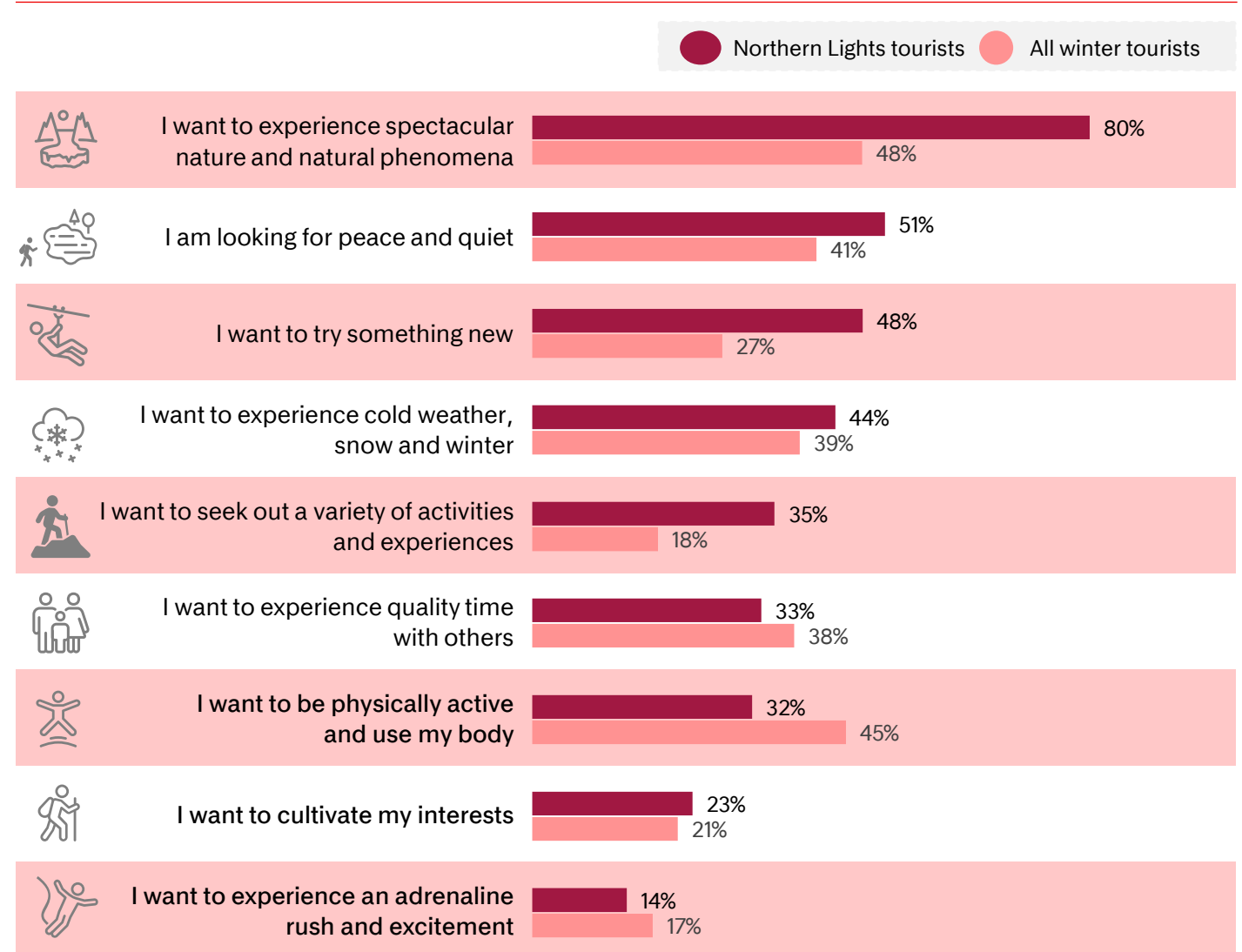
The vast majority of Northern Lights tourists want to experience both nature and culture, both peace and quiet and a varied range of activities and experiences.

Although they want to have many experiences during their holidays, plenty indicates that it is the spectacular nature experiences in general and the Northern Lights in particular that attract an increasing number of tourists.

9 in 10 are both nature and culture tourists, one of the strengths associated with several Norwegian destinations and Hurtigruten/Havila is the opportunity to experience the Northern Lights in cities and places with a varied range of spectacular nature experiences and cultural experiences.

When you spend time out in nature on this holiday in Norway, which of the following statements best describes what you are looking for?

The proportion of tourists who selected "Yes".



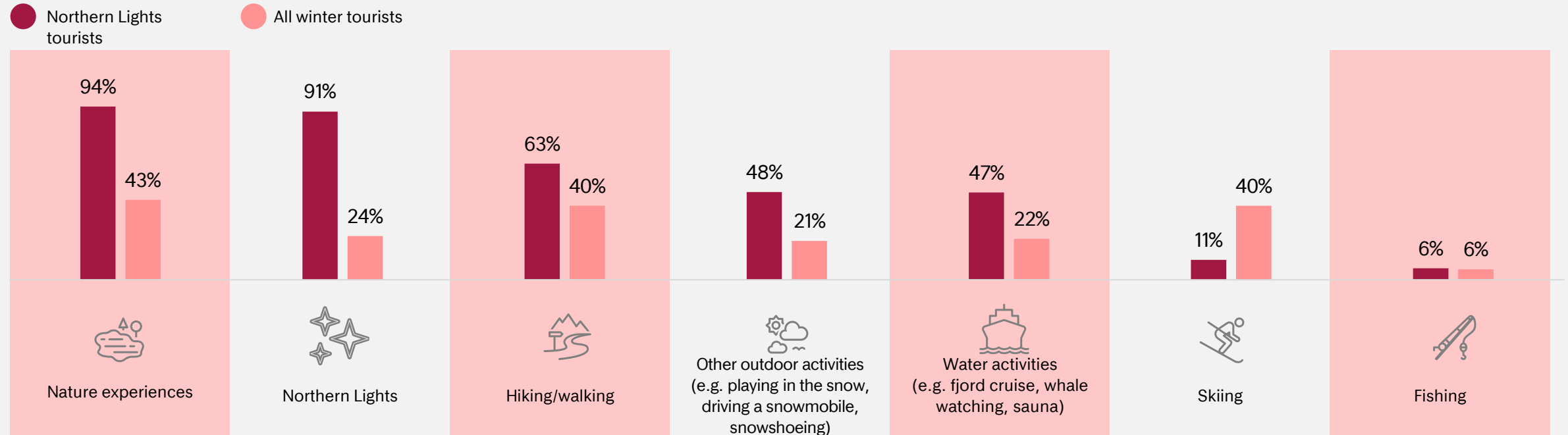
### Topic 3: Nature experiences and activities

## Northern Lights tourists combine the Northern Lights with other experiences

The search for the Northern Lights draws tourists to the north, but they also want to experience the fjords, mountains, wilderness, cold, snow, boating, dog sledding, culture, history, Sami traditions and food culture, etc. while visiting the region.

Have you already, or do you intend to do any of the following outdoor activities on this trip in Norway? / Have you done any of the following outdoor activities on this trip in Norway?

The proportion of tourists who selected the activity





### Topic 3: Nature experiences and activities

## The most popular activities for Northern Lights tourists

Americans are more likely to participate in organised outdoor activities such as Northern Lights safaris, dog sledding and snowmobiling trips.

Germans are slightly more interested in short hikes and the opportunity to experience wildlife.

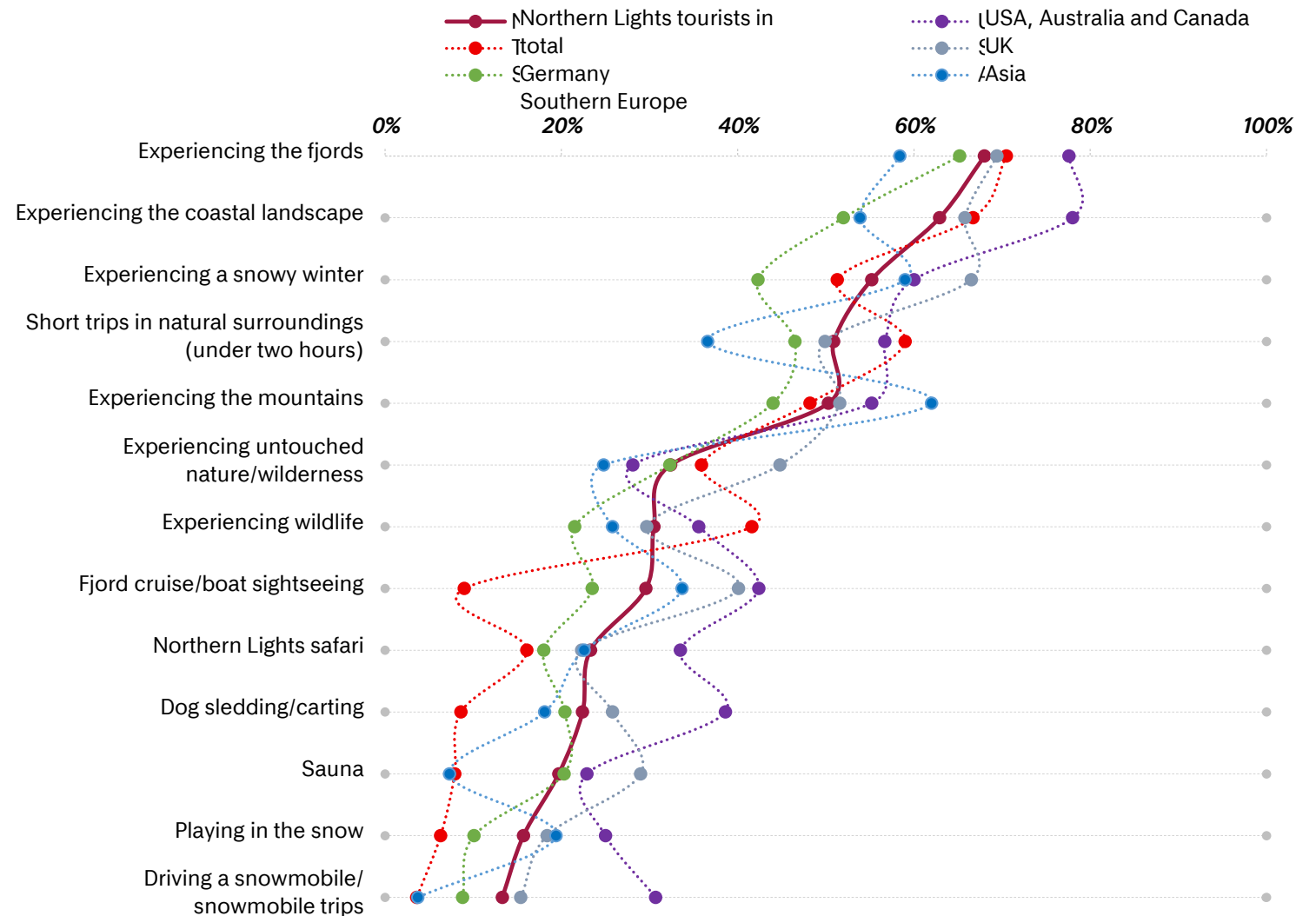
Brits are more interested in experiencing a snowy winter, the wilderness and saunas.

Southern Europeans participate less than the average tourist across all activities, spend less money during their holidays and are more interested in cultivating interests, so they may do more of fewer activities.

Asians are less interested in other nature experiences than the Northern Lights and more interested in sightseeing and cultural experiences.

Can you go into more detail regarding the activities you have done or plan to do?\*

The proportion of tourists overall who selected the activity



### Topic 3: Nature experiences and activities

## Other activities for Northern Lights tourists

In general and regardless of market, few tourists participated in any of the smaller outdoor activities. Here there are significant differences between the markets.

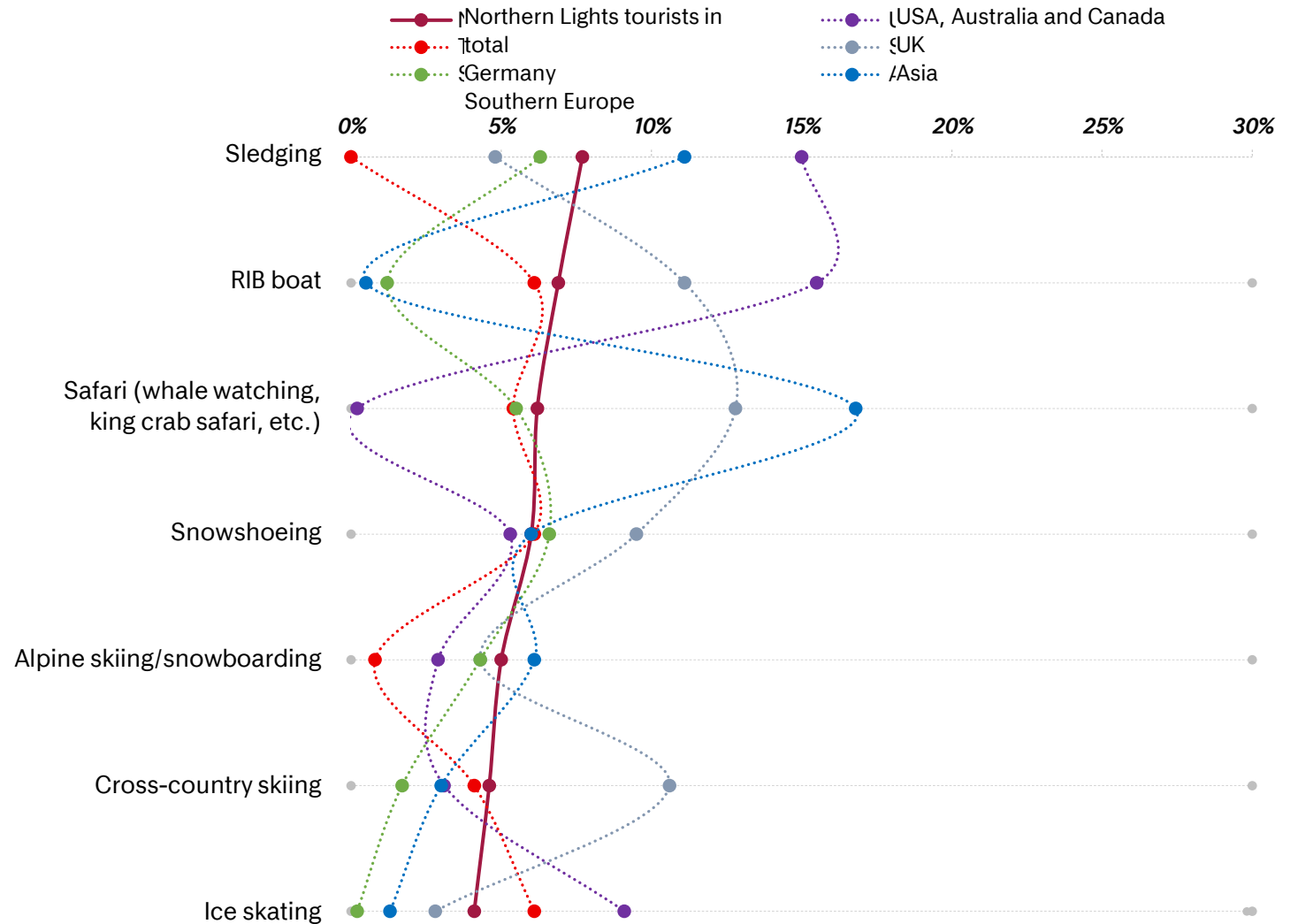
Americans are most interested in fjord/boat safaris (previous page) and trips out on RIB boats.

Brits are more interested in cross-country skiing and snowshoeing.

Asians are primarily interested in safaris and sledding, but also slightly more interested in alpine skiing/snowboarding.

Southern Europeans are not particularly interested in any of these activities apart from snowshoeing. Around 6 per cent of Southern Europeans participate in summit ski trips/ramoné skiing.

Can you go into more detail regarding the activities you have done or plan to do?  
The proportion of tourists overall who selected the activity





## Topic 4: **Cultural and city experiences**

Overview of the cultural experiences and activities tourists plan and participate in during a Northern Lights holiday and the motivations for seeking out such experiences.

#### Topic 4: Cultural and city experiences

## Cultural experiences mean that tourists get to know the places they visit better

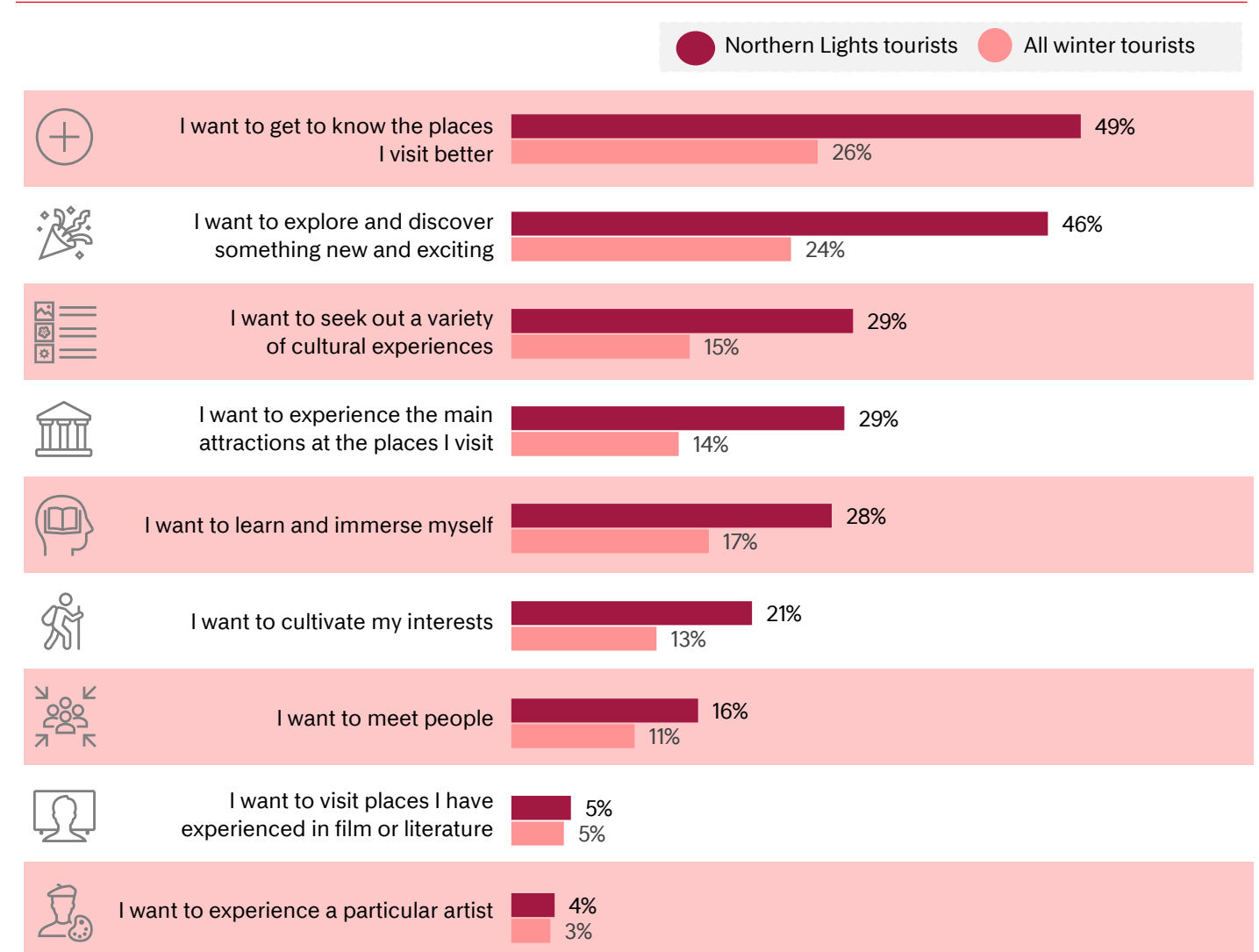
9 in 10 Northern Lights tourists are cultural tourists. The majority want to experience sightseeing, history and cultural heritage and culinary experiences during their holidays.

They primarily want to experience culture to get to know places better, discover something new and exciting and learn.

NB: Only those who responded that they have participated in or plan to participate in cultural experiences are asked follow-up questions about what they are looking for when they seek out cultural experiences. The figures have been converted to the proportion of all Northern Lights tourists and all other winter tourists in total.

### When seeking cultural experiences on this holiday in Norway, which of the following statements best describes what you are looking for?

The proportion of tourists overall who selected "Yes".



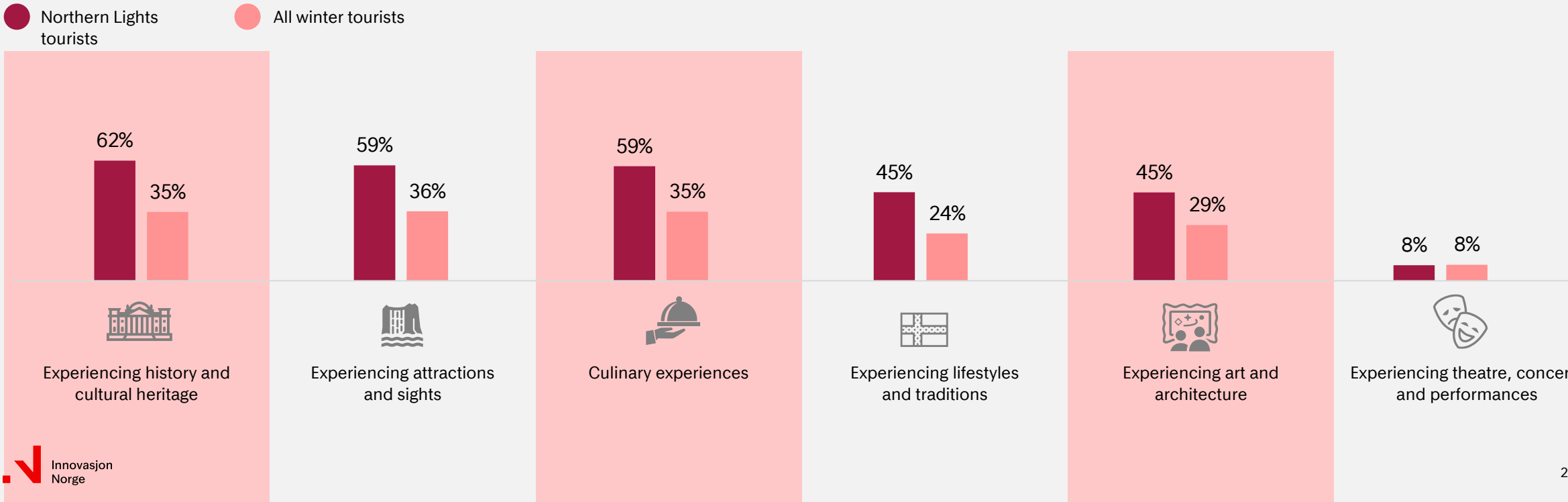


Topic 4: Cultural and city experiences

9 in 10 are cultural tourists, this applies to all age groups and countries

The interest in history and cultural heritage, art and architecture increases with age. Culinary experiences, lifestyle and traditions are (nearly) as important for all age groups and markets. Tourists over the age of 50 years are consistently more satisfied with attractions, sights, museums and cultural offerings. Fewer people are satisfied with culinary experiences and the opportunities to experience local culture and lifestyles.

Have you done any of the following cultural activities on this trip in Norway?  
The proportion of tourists who selected the activity



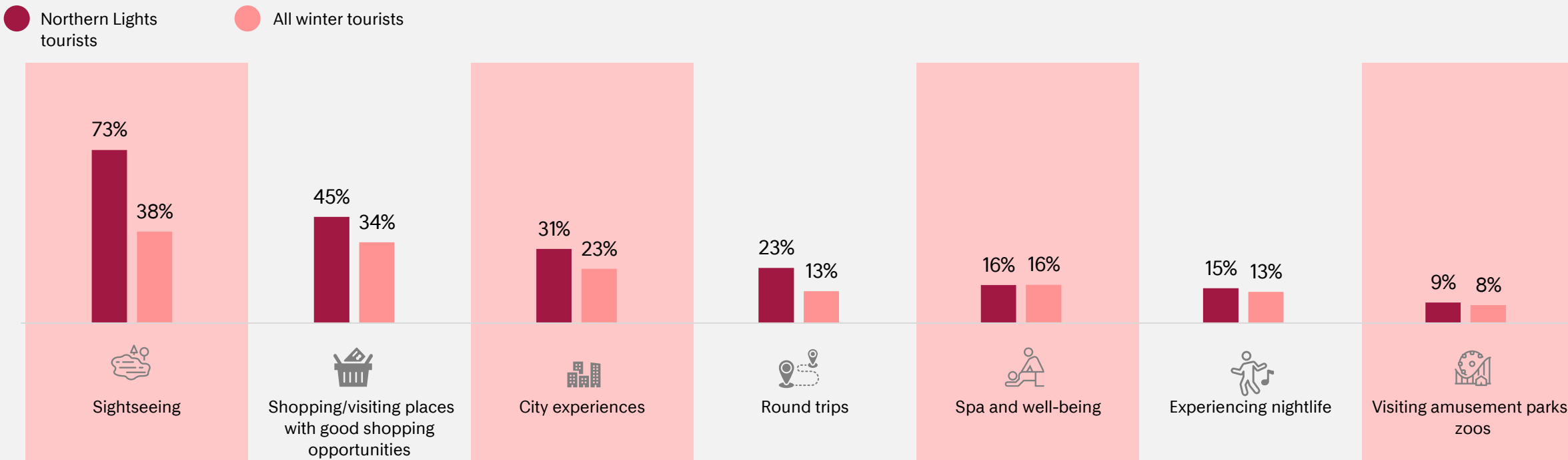
Topic 4: Cultural and city experiences

# Sightseeing is especially important for Americans and Asians

Those under 30 are more interested in nightlife. Those under 40 are more interested in spa and well-being. Asians and those over 50 want to shop during their holidays. 1 in 2 Americans want to have city experiences.

Have you done or are you planning to do any of the following activities on your holiday in Norway? / Have you done any of the following activities on your holiday in Norway?

The proportion of tourists who answered that they have done or plan to do the following activities during their holidays



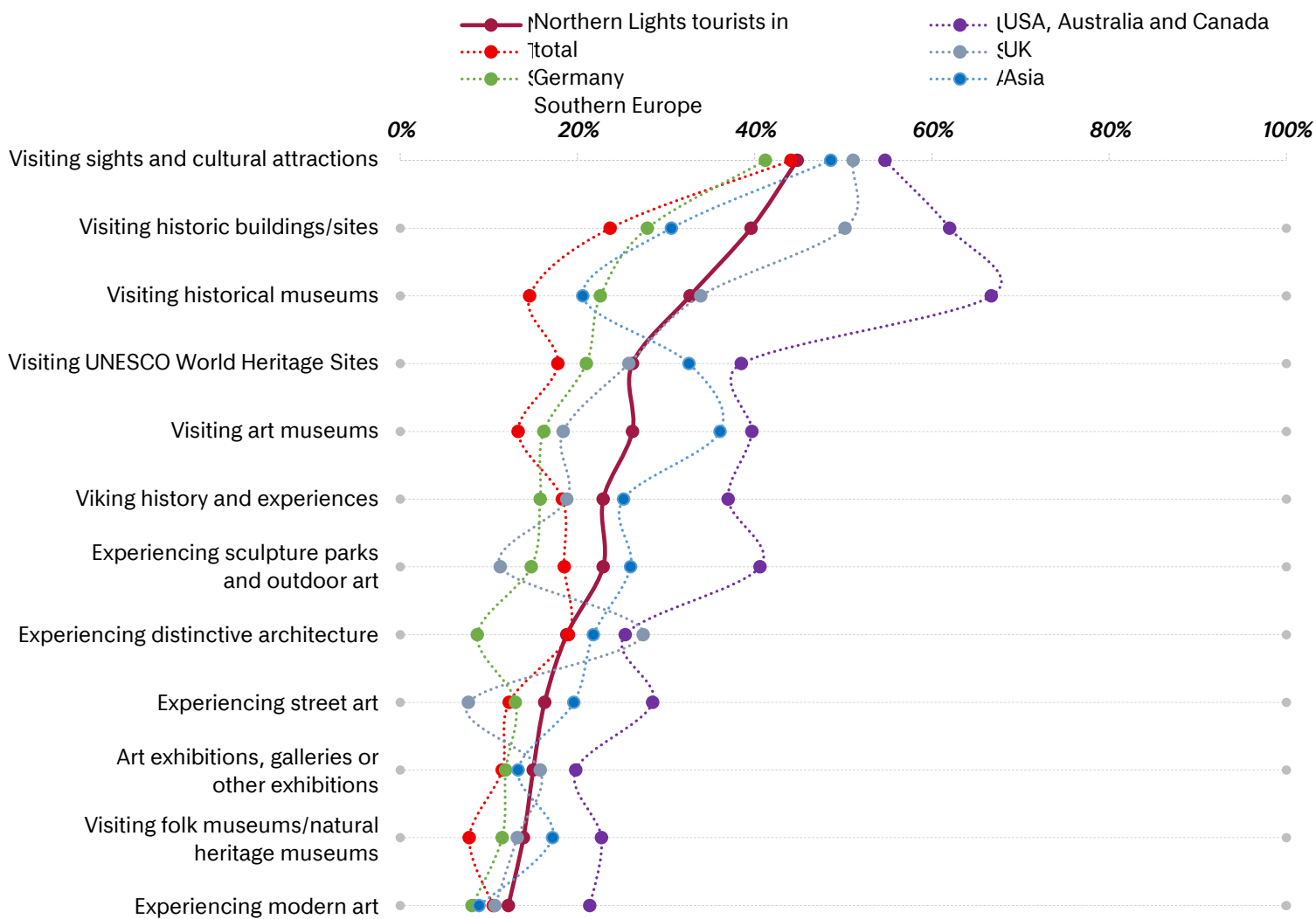
Topic 4: Cultural and city experiences

# Americans stay the longest and do the most

Americans (as well as Australians and Canadians) spend more time in Norway than those visiting from other markets. This also means that they have more time available to experience a wider range of both nature and cultural experiences.

## Can you go into more detail regarding the cultural activities you have done or plan to do?\*

The proportion of tourists overall who selected the activity



\* Only those who answered that they have participated in or want to participate in cultural experiences are given a follow-up question encouraging them to elaborate on the nature experiences they have participated in or want to participate in. The figures have been converted to the proportion of all Northern Lights tourists and other winter tourists.

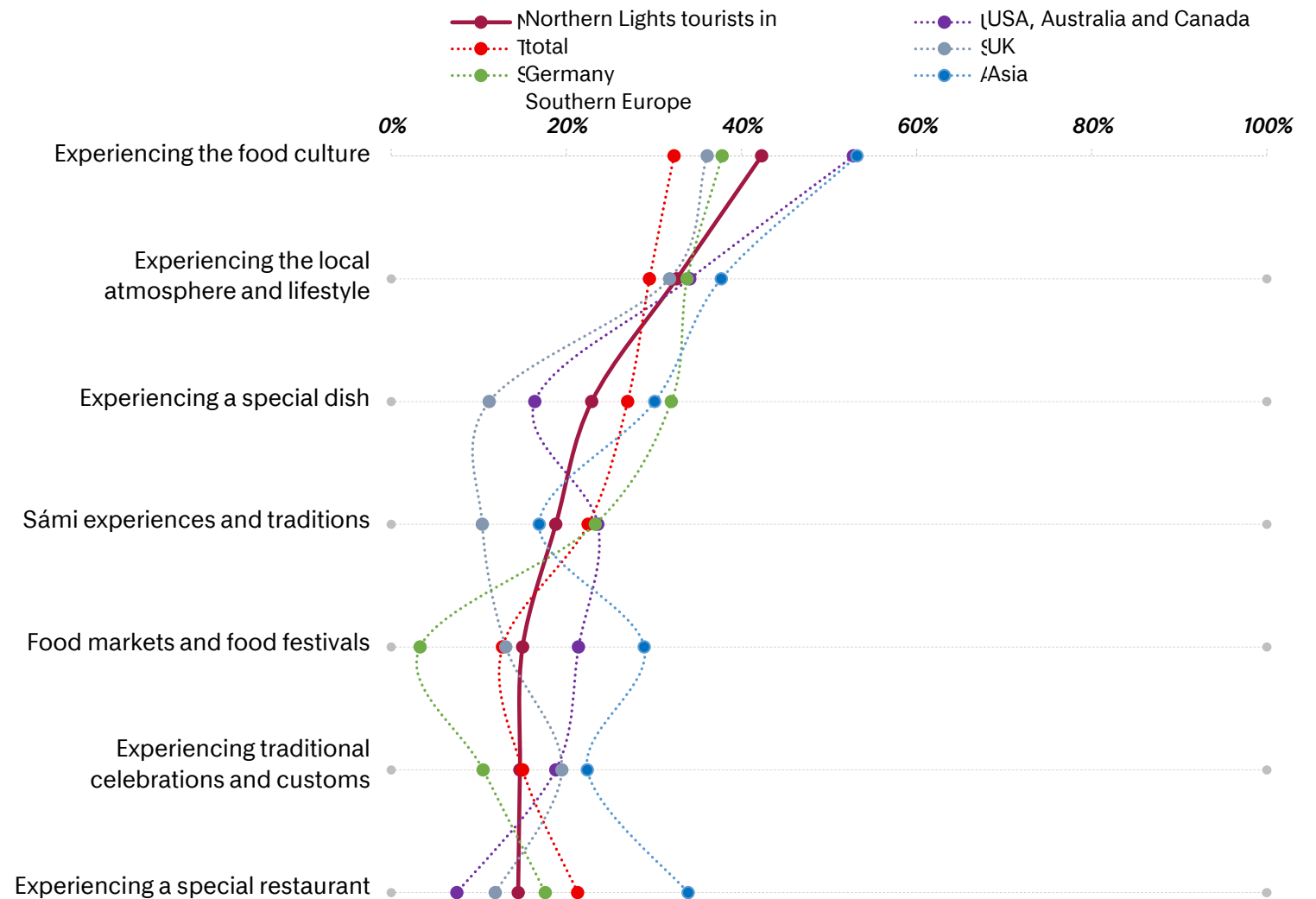
## Topic 4: Cultural and city experiences

# Asians are most interested in food culture and lifestyle

Americans and Asians are most interested in experiencing the (Northern) Norwegian lifestyle and food culture. The greatest similarity between the markets (and different age groups) is in the interest in local lifestyle, Sami experiences and traditions and traditions and traditional celebrations and customs.

Can you go into more detail regarding the cultural activities you have done or plan to do?\*

The proportion of tourists overall who selected the activity





# Topic 5:

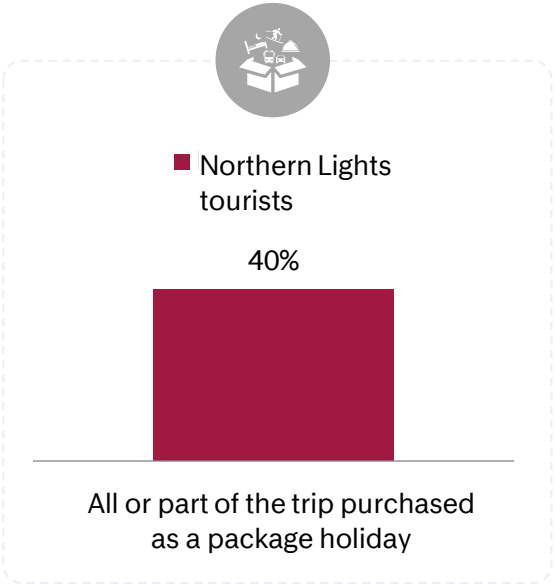
## **Expenditure and travel companions**

Northern Lights tourists' expenditure is influenced by the markets they originate from, who they travel with, how long their holidays are and whether or not they have purchased a package holiday.



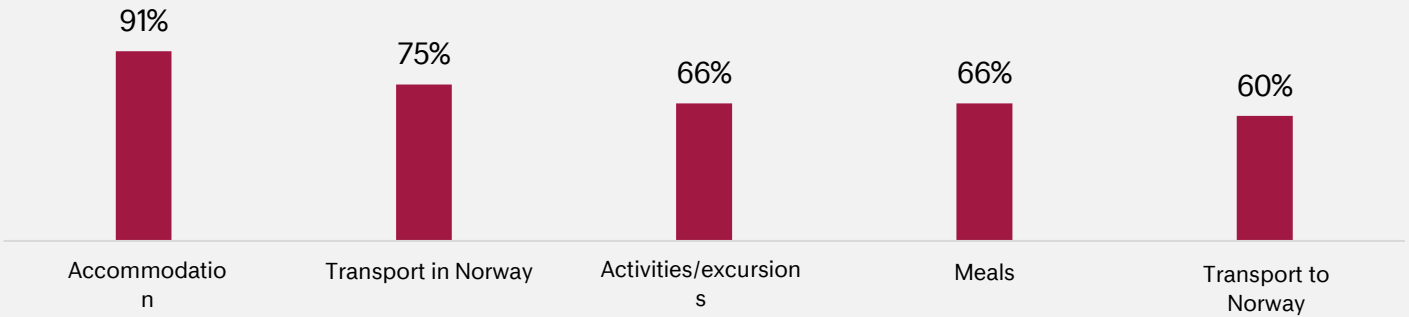
# What is included in the package holiday?

Tourists who purchase package holidays spend more money. They are more likely to stay at hotels and on Hurtigruten/Havila and they are older than those who organise their entire trip independently.



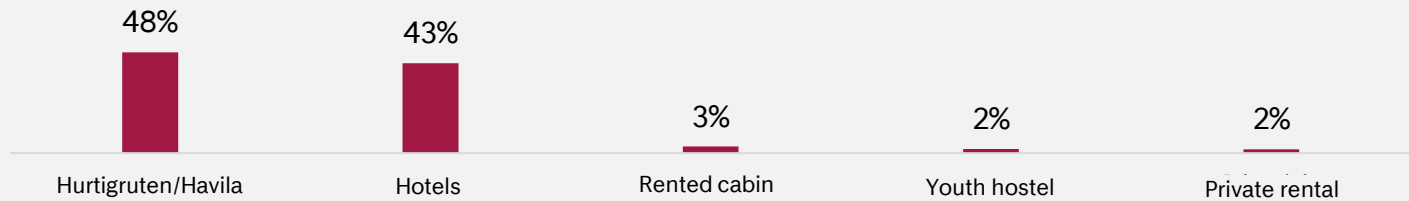
## What is included in the package holiday?

The proportion of foreign Northern Lights tourists on package holidays who stated that the activity was part of the package holiday



## Breakdown of overnight stays by accommodation type

The proportion of foreign Northern Lights tourists on package holidays who stated that accommodation was part of the package holiday



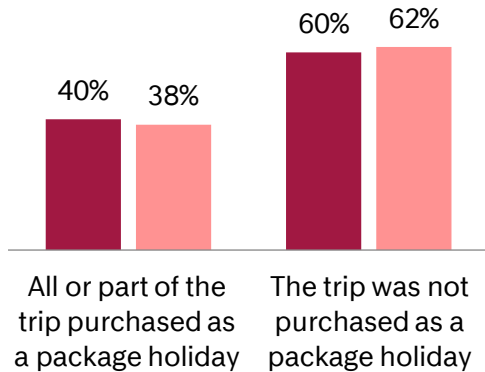
## Topic 5: Expenditure and travel companions

# 4 in 5 participate in organised outdoor activities

4 in 5 Northern Lights tourists participate in one or more organised outdoor activities. These tourists have a higher daily expenditure than those who do not participate in this type of activity. This applies regardless of whether or not they have purchased a package holiday. 66 per cent of tourists on package holidays have purchased packages that include activities/excursions, while as many as 8 in 10 of those on package holidays participate in organised trips during their holidays. A large majority of those who have not purchased package holidays also participate in organised outdoor activities.

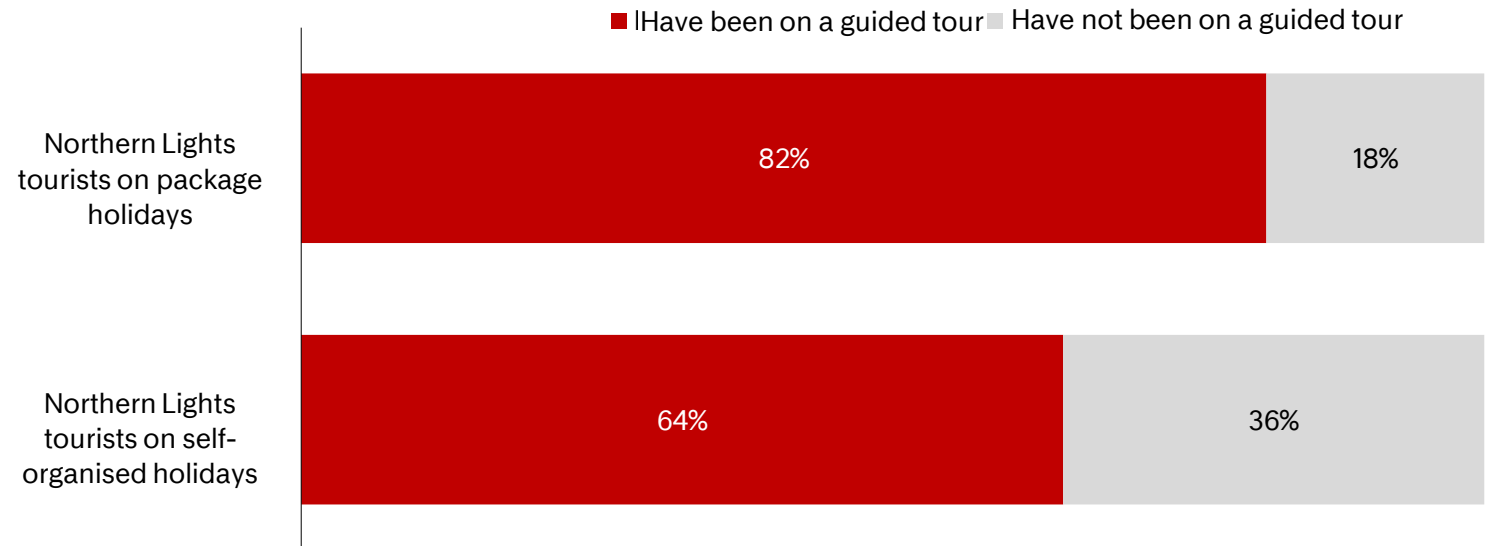


Northern Lights tourists  
All winter tourists



## Were any of the outdoor activities/experiences of nature with a guide or organised trips?

The proportion of foreign Northern Lights tourists on package holidays or self-organised holidays



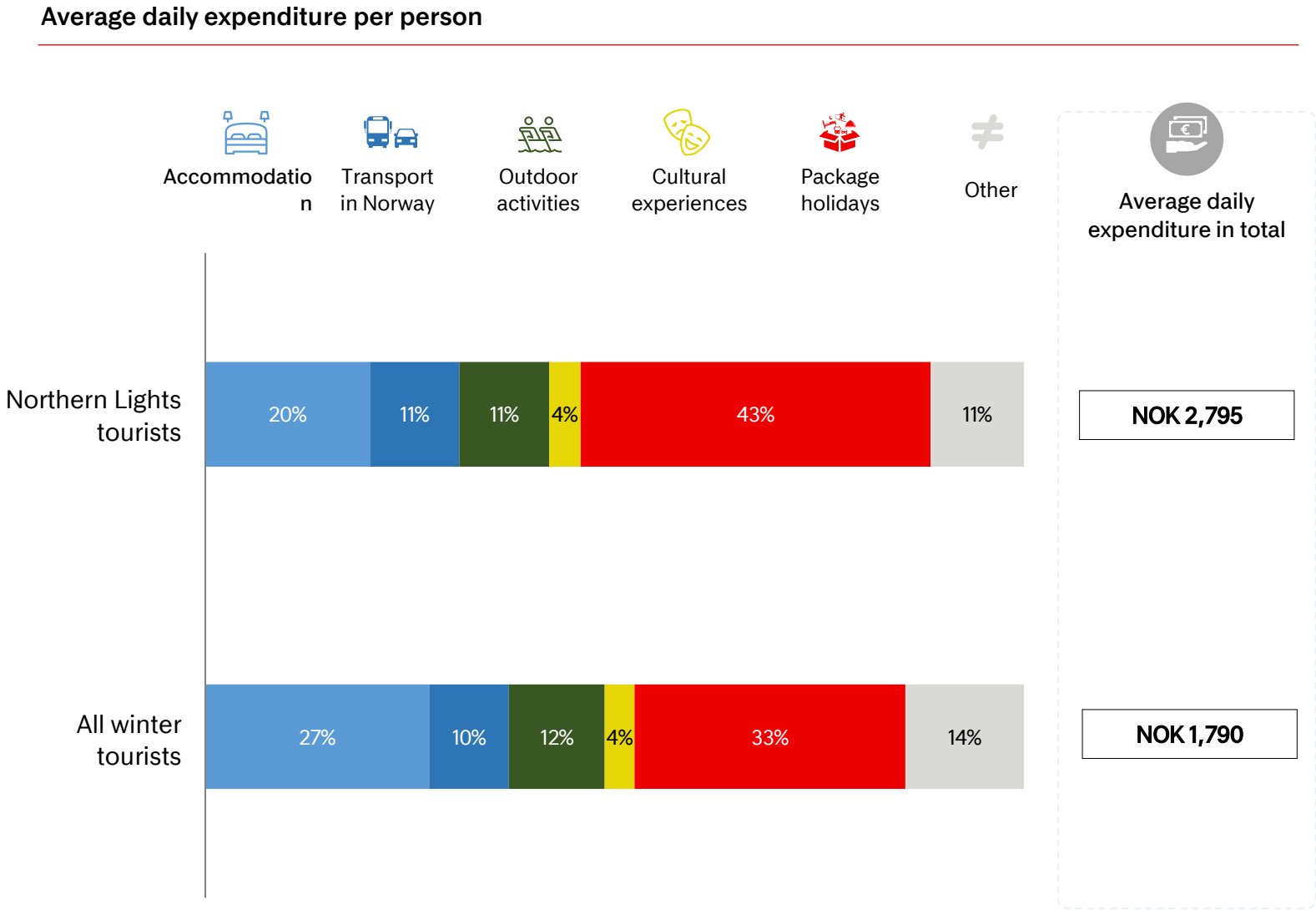
Topic 5: Expenditure and travel companions

# Northern Lights tourists have a high expenditure during their holidays in Norway

4 in 10 Northern Lights tourists have purchased all or parts of their trip as a package holiday. More than 40 per cent of expenditure during the Northern Lights holiday can be attributed to the price of the package holiday.

9 in 10 of those who purchase package holidays purchase packages that include accommodation. A smaller proportion of expenditure is therefore attributed to accommodation and a greater proportion is attributed to the price of the package.

A majority, 6 in 10, of those on package holidays have also purchased packages that include activities, meals and transport in Norway. Northern Lights tourists have an average expenditure of NOK 1,000 more per day than the average for all winter tourists (note that Northern Lights tourists are also included in the average). This means that Northern Lights tourists spend more money on outdoor activities, cultural experiences, shopping, restaurant visits, etc., than other winter tourists. They participate in more activities, are more likely to use a guide and access a greater proportion of the overall offerings available at the destinations they visit.



Note: The percentages are rounded so it is possible that the numbers do not add up exactly to 100%. Percentages at or below 2% are not included.  
Daily expenditure on transport to Norway is not included in this calculation.

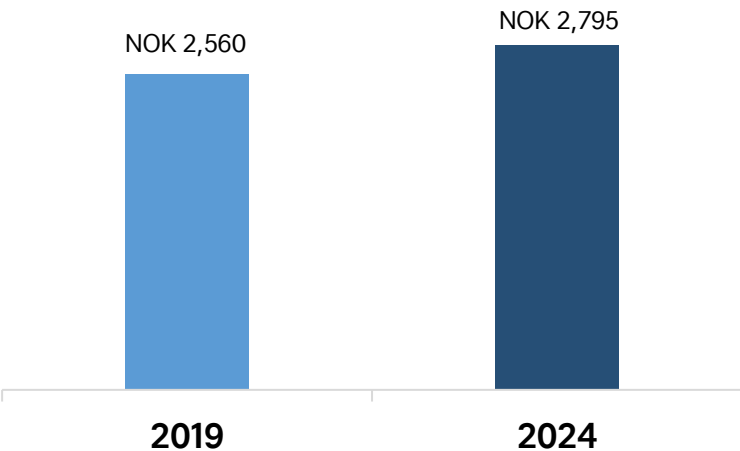


# Northern Lights tourists' daily expenditure

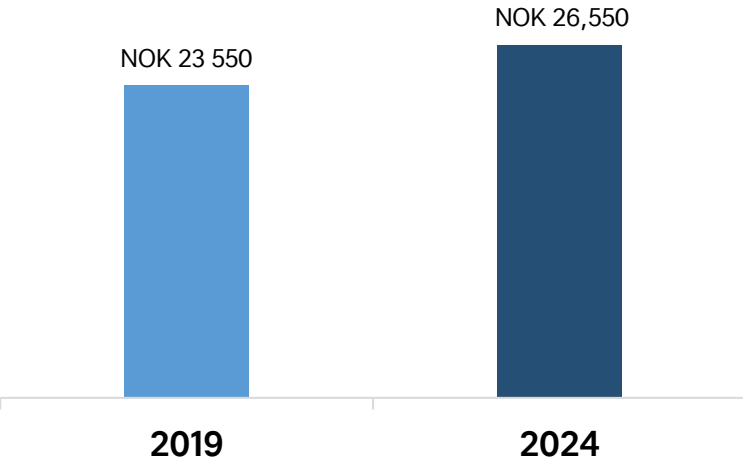
Daily expenditure remains relatively stable compared to both 2019 and 2023. The proportion who have purchased package holidays is at around the same level as in 2019. Holidays have become slightly longer than before the pandemic, which has contributed to an increase in total expenditure per person and there are more people in the shared financial group of travel companions, which means that the total expenditure for travel companions has increased. At the same time, there were considerably more tourists in 2024 than in 2023 and 2019. This also means that overall tourist expenditure has increased significantly.

**Calculation of daily expenditure and total expenditure:**  
Respondents have stated how much money they have spent on the trip to Norway overall and broken down by different expenditure items. Expenditure has been stated for the entire group sharing finances. Daily expenditure per person has been calculated by dividing by the number of travel companions and number of overnight stays. Expenditure has been controlled for typing errors and outliers (for both very low and high expenditure).

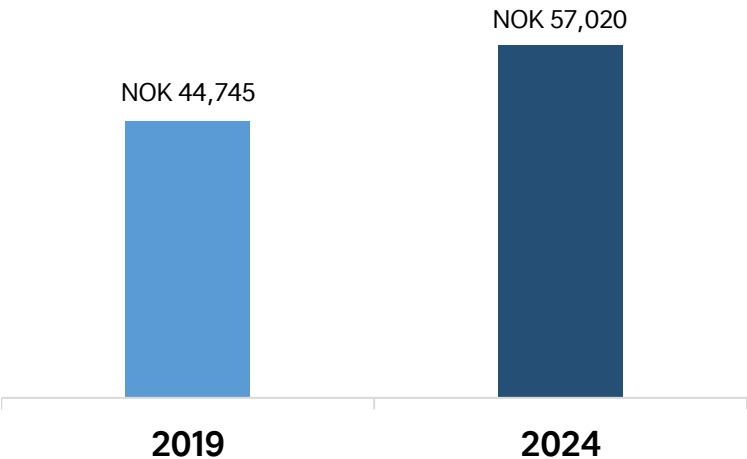
Average daily expenditure (NOK) per person for Northern Lights tourists



Average total expenditure (NOK) per person for Northern Lights tourists



Average total expenditure (NOK) for the entire group of travel companions with shared finances



Note: 40 per cent of Northern Lights tourists have purchased a package holiday. 60 per cent of these say that all or parts of transport to Norway were included in their package. For these tourists, transport to Norway has been included as part of the expenditure on the holiday. For other tourists, transport to Norway has not been included in the calculation of expenditure. A Northern Lights tourist whose transport to Norway is not included spends an average of NOK 8,120 on transport to Norway, which amounts to NOK 718 per day.

Topic 5: Expenditure and travel companions

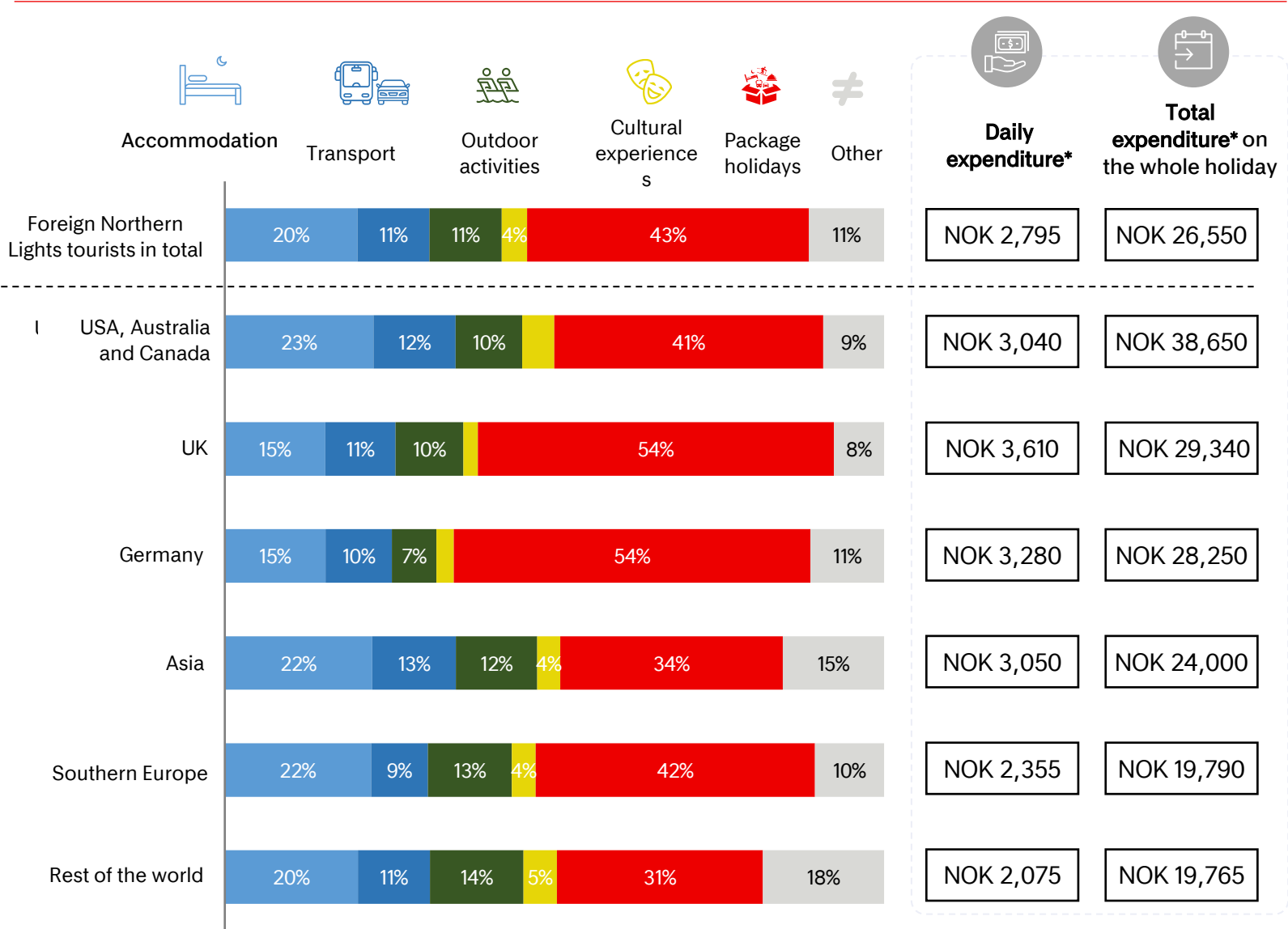
A large proportion of expenditure is associated with package holidays

More than 40 per cent of expenditure associated with Northern Lights holidays relates to package holidays. All major Northern Lights markets, such as Germany, the UK and the USA, have a higher expenditure than the average.

Tourists from Germany spend considerably more money on a trip to experience the Northern Lights than on holidays at other times of the year. 55 per cent of German holidaymakers have purchased package holidays. More than 9 in 10 of these purchase package holidays that include transport to Norway. This means that they end up with artificially high expenditure, as transport to Norway is not included in the calculation of expenditure for those who are not on a package holiday or whose transport is not included in a package holiday.

Tourists from the USA and Asia whose transport is not included in their package holidays spend an average of NOK 960 and NOK 830 respectively per day on transport to Norway.

Average daily expenditure and total expenditure per person for Northern Lights tourists



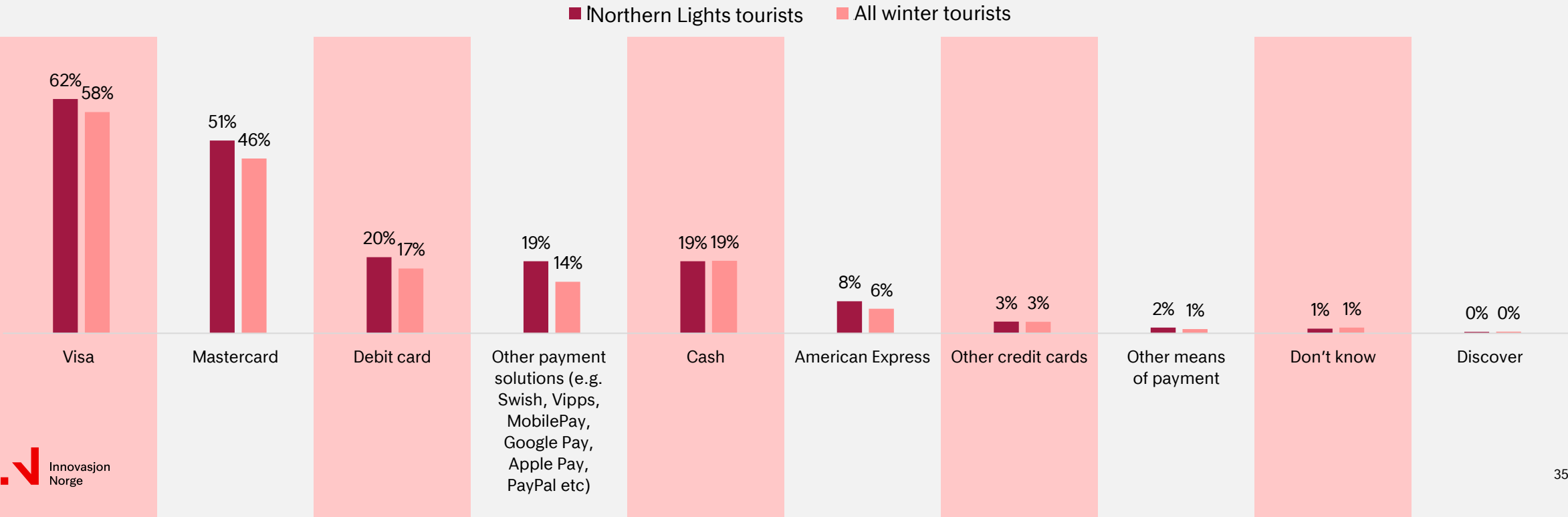
Note: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages of or below 3% are not included.  
Daily expenditure on transport to Norway is not included in the calculation of daily expenditure and total expenditure. On average, this amounts to NOK 720 per day for tourists whose package holiday does not include transport.  
\*The average expenditure has been rounded to the closest NOK 5.

# Only 1 in 5 use cash

Most people only use digital means of payment, not cash, during their holidays in Norway. Northern Lights tourists are more likely to use “other payment solutions” and this share has increased from 14 per cent in 2023 to 19 per cent in 2024.

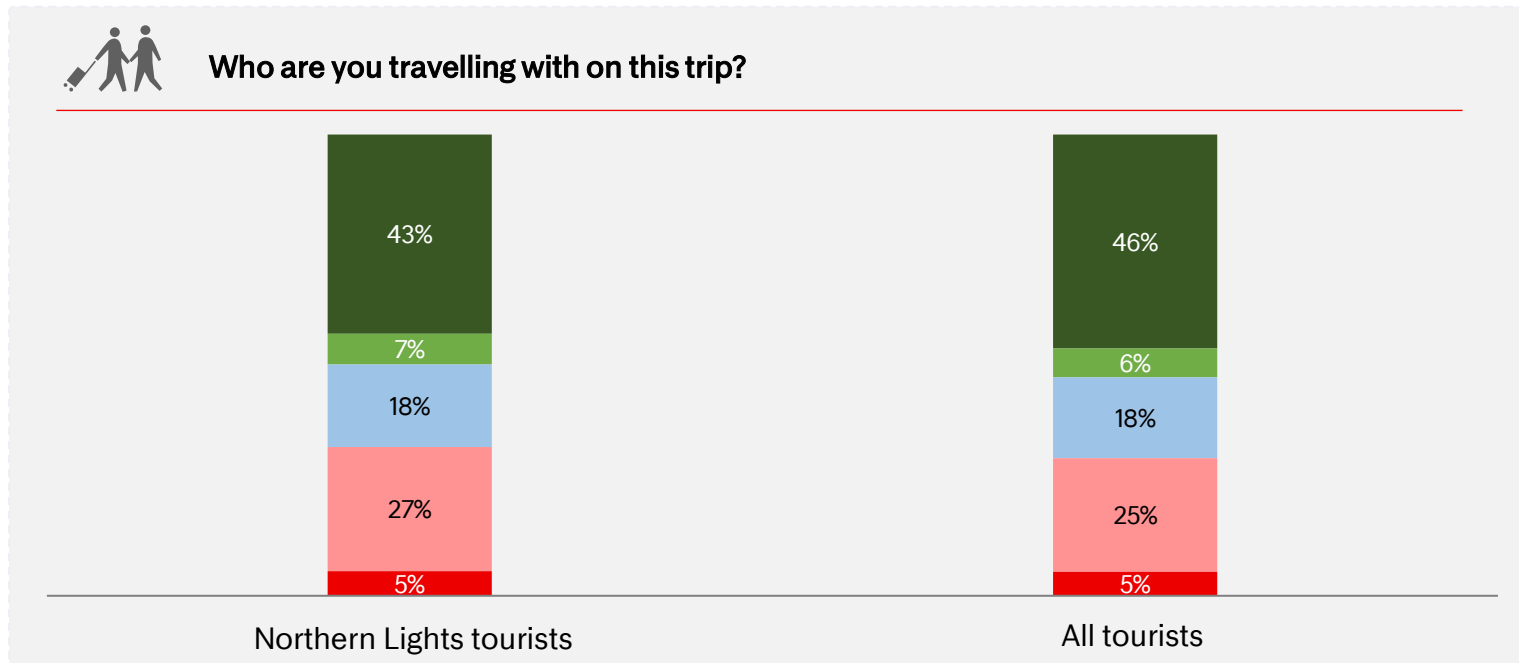
## What means of payment have you used in Norway on this trip?

The proportion of tourists who have stated that they used the means of payment



## The majority travel only with a spouse/partner on a Northern Lights holiday

43 per cent of Northern Lights tourists travel only with a spouse/partner. These are the tourists who spend the most money on their holidays. There is also a large group who travel primarily with friends, but also a few in this group who travel as part of an organised trip together with others. There are few families with children and few people who travel alone on a Northern Lights holiday.



**Couple:** People travelling only with a spouse/partner.



**Families with children:** People travelling with at least one child under the age of 18 years



**Travelling with (extended) family:** People travelling with children over the age of 18/other family members or relatives.



**Travelling with others:** People travelling with friends/colleagues/as part of a tour group or someone else.



**Travelling alone:** People travelling alone





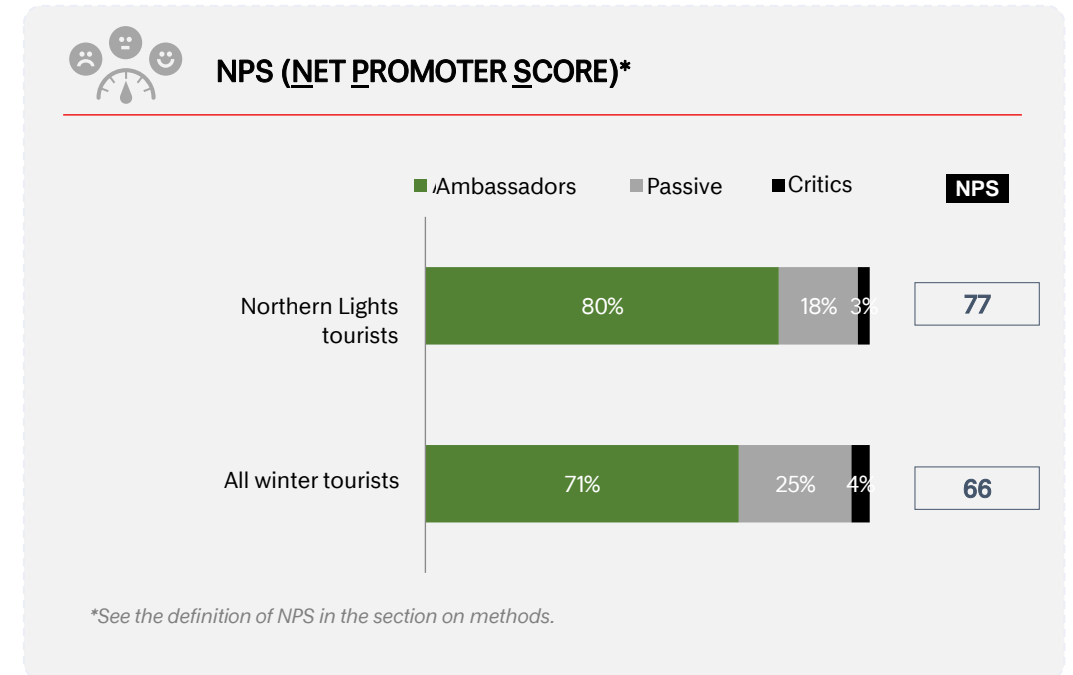
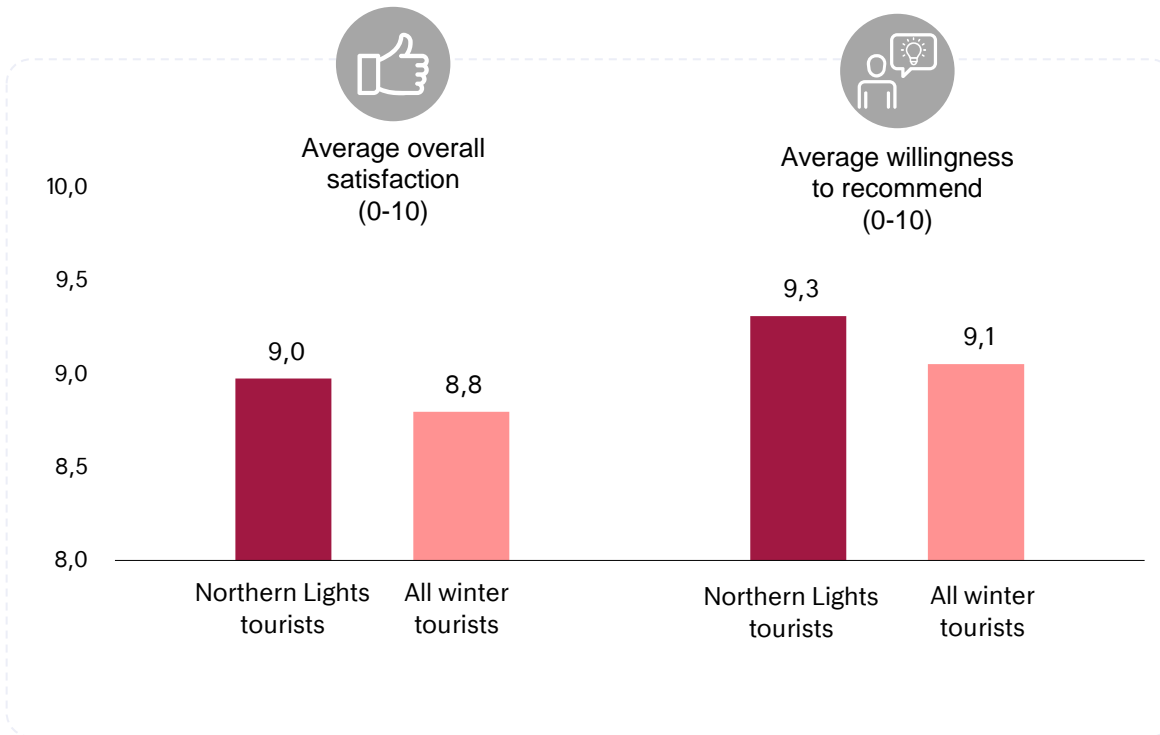
## Topic 6: **Satisfaction and willingness to recommend**

Northern Lights tourists are ambassadors for Norway and are very satisfied with their holidays overall.

## Topic 6: Satisfaction and willingness to recommend

# Northern Lights tourists are ambassadors for holidays in Norway

One important reason why there are more ambassadors among Northern Lights tourists is the fact that the composition of the tourists differs. There are more Brits, Americans and Asians and they are consistently more willing to recommend Norway, regardless of holiday type. NPS has increased considerably from 2023 (71) and is now higher than in 2019 (73).



Topic 6: Satisfaction and willingness to recommend

# Northern Lights tourists are very satisfied with most things

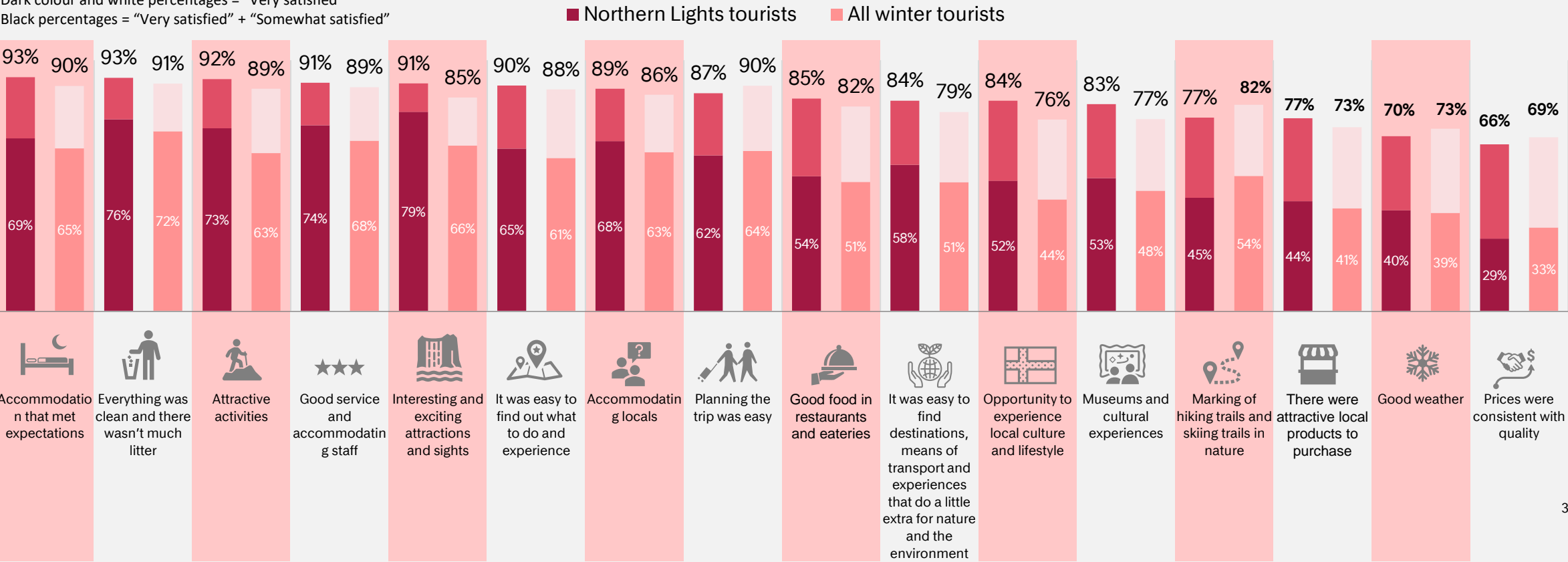
Over half of Northern Lights tourists are very satisfied in all areas measured, with the exception of “marking of hiking trails and skiing trails”, “that there were attractive local products to purchase”, “good weather” and “prices were consistent with quality”. Ski tourists are considerably more satisfied with prices being consistent with quality, with no less than 38 per cent responding that they were very satisfied.

## How satisfied or dissatisfied are you with the following?

The proportion of “Somewhat” and “Very” satisfied.

Dark colour and white percentages = “Very satisfied”

Black percentages = “Very satisfied” + “Somewhat satisfied”

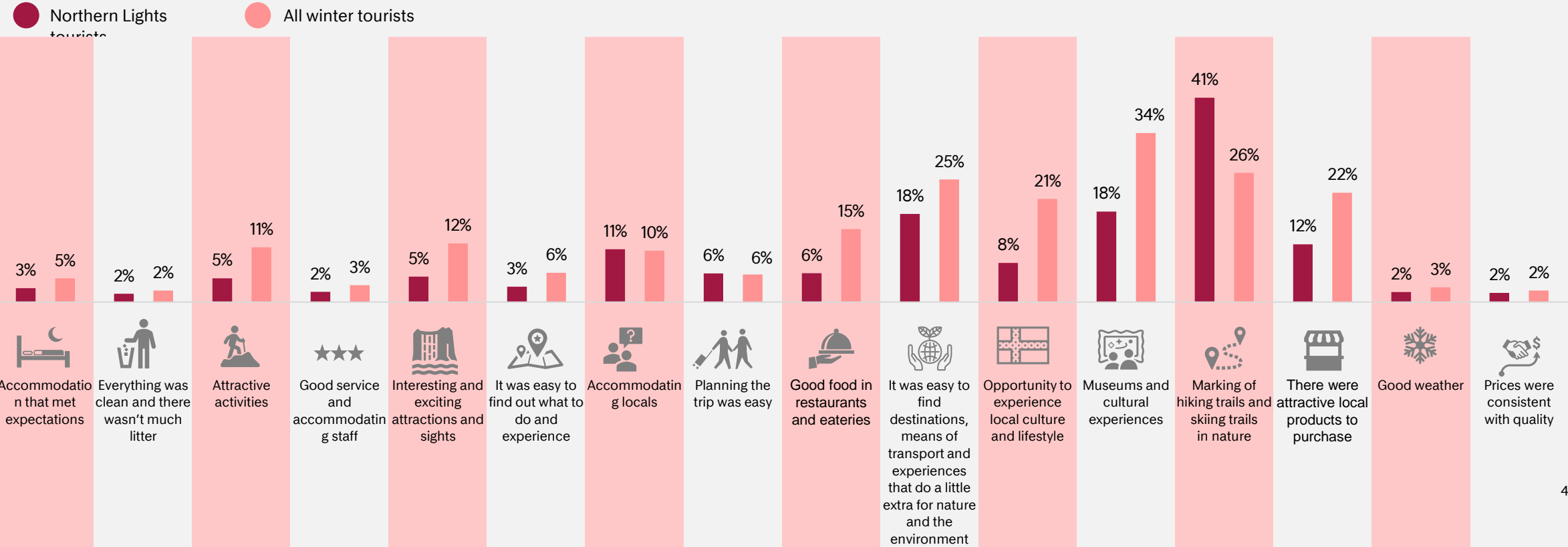


Topic 6: Satisfaction and willingness to recommend

Fewer “Not applicable”

There were fewer people who responded “Not applicable” compared to the previous year in relation to attractive activities, good food at restaurants and eateries and “attractive local products to purchase”. This indicates that the vast majority of tourists access a wide range of commercial offerings in Norway. The only area where the proportion of “Not applicable” has increased is for the “marking of hiking trails and skiing trails”. At the same time, more people used organised trips/guides than in 2023.

How satisfied or dissatisfied are you with the following?  
The proportion of “Not Applicable”.







# Topic 7:

## **Sustainability and Northern Lights tourism**

Northern Lights tourists are interested in nature, climate and the environment during their holidays.

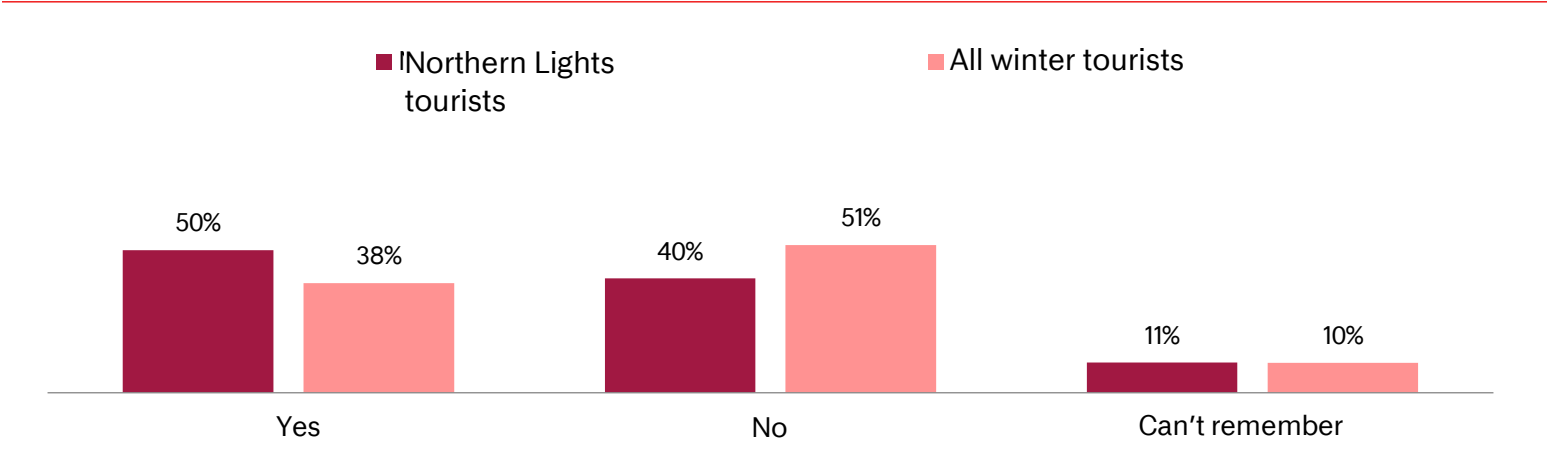
# Half look into sustainability when planning their holidays

Asians, Southern Europeans and Brits are more included to emphasise sustainability when planning their holidays. Those over 50 years of age in particular responded that they checked whether stakeholders were climate-friendly or looked after nature when planning their holidays.

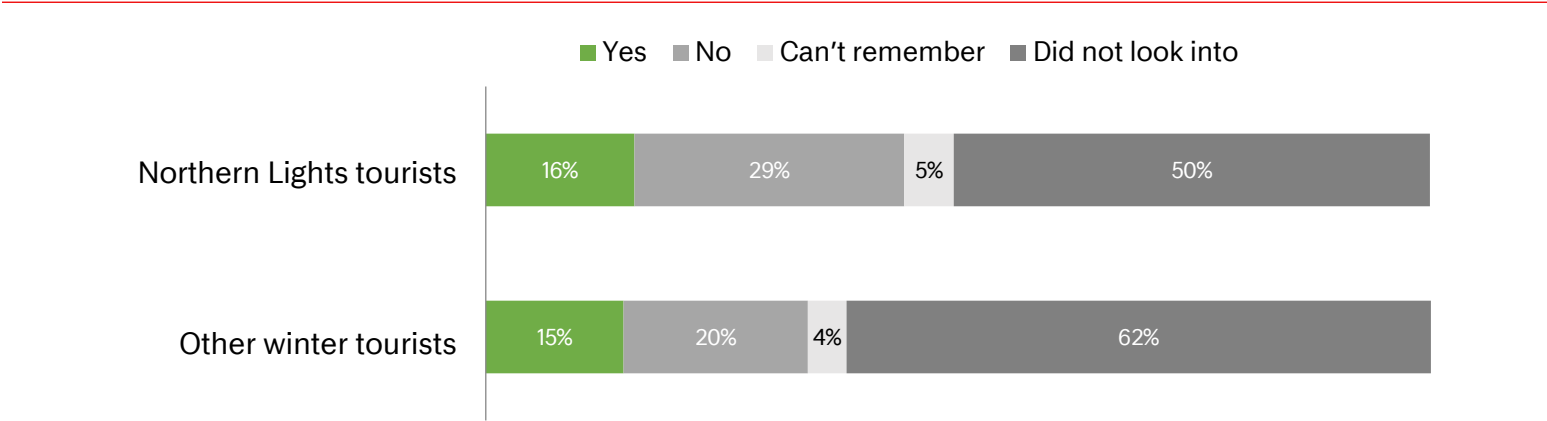
The proportion of respondents who eliminated stakeholders for reasons of nature and climate remains at the same level as last year.

58 per cent of Northern Lights tourists say that they are very satisfied with it “being easy to find destinations, means of transport and experiences that do a little extra for nature and the environment”.

During the planning of this trip, did you look into whether the destination(s), mode(s) of transport and/or experience(s) are environmentally friendly or climate-friendly?



When deciding where to go, were there any destinations, modes of transport and experiences you did not choose out of consideration for nature and/or the climate?



# More people want to shop locally

More than 7 in 10 want to shop with local enterprises. This is an increase of 10 percentage points from 2023.

It is therefore important to ensure that they are more satisfied with the opportunity to purchase local products. A total of 1 in 3 are willing to pay more to ensure that nature and the environment are better looked after.

## On this trip in Norway, are you going to or have you done any of the following in order to safeguard nature, the environment and the climate?

The proportion of Northern Lights tourists who responded “Yes” to whether they have done or plan to do the following during their holidays







## Topic 8:

# Potential target group for Northern Lights holidays

A little taste of relevant target groups for Northern Lights holidays based on the Innovation Norway target group study.



# Read more about relevant target groups

A holiday to experience the Northern Lights or other extraordinary winter experiences may be attractive to more target groups in international markets.

Quiet Nature, Adventure and Culture and Nature are three of the nine target groups described in Innovation Norway's target group study. The target groups are distinguished from one another by having different needs and expectations for their holidays and destination.

The target group study was conducted in Sweden, Denmark, Germany, the Netherlands, the UK, France, Spain, Italy and the USA in December 2023.

Insights about the target groups provide important tools for both strategic and practical discussions on strategy, innovation and sustainable development.

The overall results can be found in the main report "[Target Groups and Norway's position](#)" from July 2024.

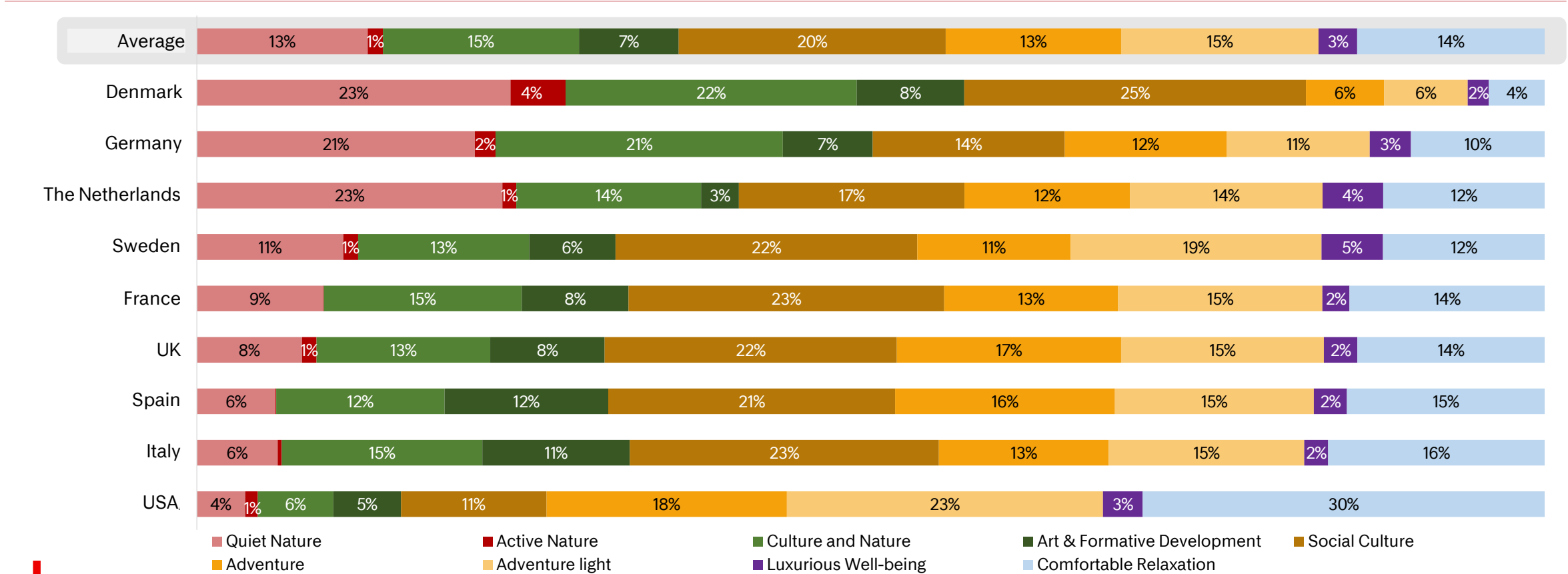


Topic 8: Potential target groups for Northern Lights holidays

Major differences between the markets

Target group size (share of overnight stays)\*  
Target group share of overnight stays during holidays in each market

There are major differences in how large a proportion of the market for holiday trips the different target groups make up in each country. It is important to note that there are consistently much greater differences in needs and preferences **between target groups** than **between countries/markets**.





# Appendix:

## **Data, methodology and definitions**

Overview of data, number of interviews and methodology for the weighting of data.

# Definition of terms

Terms	Definitions
Tourist	A tourist in Norway is defined as a person travelling in Norway outside their usual surroundings for more than one day, but for less than half a year (or 183 days). If the latter is not the case, the person is regarded as residing in Norway and is therefore not considered a tourist.
Northern Lights tourist	A Northern Lights tourist in Norway is defined as a foreign holidaymaker who has responded that they either want to experience the Northern Lights and/or participate in a Northern Lights safari and who has had at least one overnight stay in Northern Norway or on Havila/Hurtigruten.
All winter tourists	All foreign holidaymakers who have visited Norway during the winter season (January to April).
Travelling companions	Travel companions means individuals who travel together.
Other expenditure	Other expenditure includes the tourists' expenditure in addition to transport, accommodation, outdoor activities, cultural activities and package holidays. This could include the purchase of groceries, items from cafeterias and kiosks, restaurants, etc.
Package holidays	All or parts of the holiday is purchased as a package holiday from a supplier, i.e. a package including at least two of the following services: transport, accommodation, skip pass/ski school, two or more meals per day, activities/excursions.
NPS	<p><u>Net Promoter Score</u> (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: <i>"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?"</i>. Those who enter a score of 0 to 6 are described as being <i>critics</i>, those who enter a score of 7 or 8 are described as being <i>passive</i>, and those who enter a score of 9 or 10 are described as being <i>ambassadors</i>. The NPS value is defined as the percentage of tourists who are ambassadors, minus the percentage of critics, i.e. <math>NPS = \% \text{ ambassadors} - \% \text{ critics}</math>.</p>
Number of activities	Number of activities is calculated as the number of specific activities and experiences the respondent has specified at the lowest activity level, such as summit ski trips, art museums and experiencing the fjords.

# Data and methods

This report takes a closer look at foreign Northern Lights tourists in Norway during the 2024 winter season. The table on the right shows the number of responses from foreign holidaymakers in Norway, grouped by Northern Lights tourists and other winter tourists.

Data was collected by Norstat throughout the entire winter season (January to April). The interviews are based on a sampling plan established on the basis of the overnight accommodation statistics administered by Statistics Norway (SSB). Tourists were interviewed at attractions, overnight accommodation, airports, ports, ski resorts, etc.

Respondents who either responded that they have been in Norway for more than 6 months or that they are not staying in Norway overnight have been excluded from the analysis. Overnight accommodation at hotels, campsites and cabin clusters (registered types of accommodation) is weighted by accommodation level, with a weighting calculated on the basis of the hotel, camping and cabin cluster accommodation statistics from Statistics Norway. Overnight accommodation at other types of accommodation (unregistered types of accommodation) is weighted based on the distribution in the sampling/data and the overall distribution of overnight accommodation from all enterprises.

The weighting functions such that the individual respondent is weighted to represent a proportion of the population. The weighted respondents therefore represent the total population. In order to prevent individual respondents being of disproportionately significant importance, the maximum weighting has been trimmed. Visitors with many overnight stays therefore have a higher weighting than visitors with few overnight stays, but without individual visitors being able to disproportionately influence the averages. When we estimate an approximate number of overnight stays, this is done based on the assumption that the sample is representative of commercial tourism in Norway.

Number of interviews with foreign holidaymakers (ski tourists and other winter tourists) who have stayed in Norway overnight during the 2024 winter season

	Northern Lights tourists	Other winter tourists	Total
Number of interviews	800	2,610	3410



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