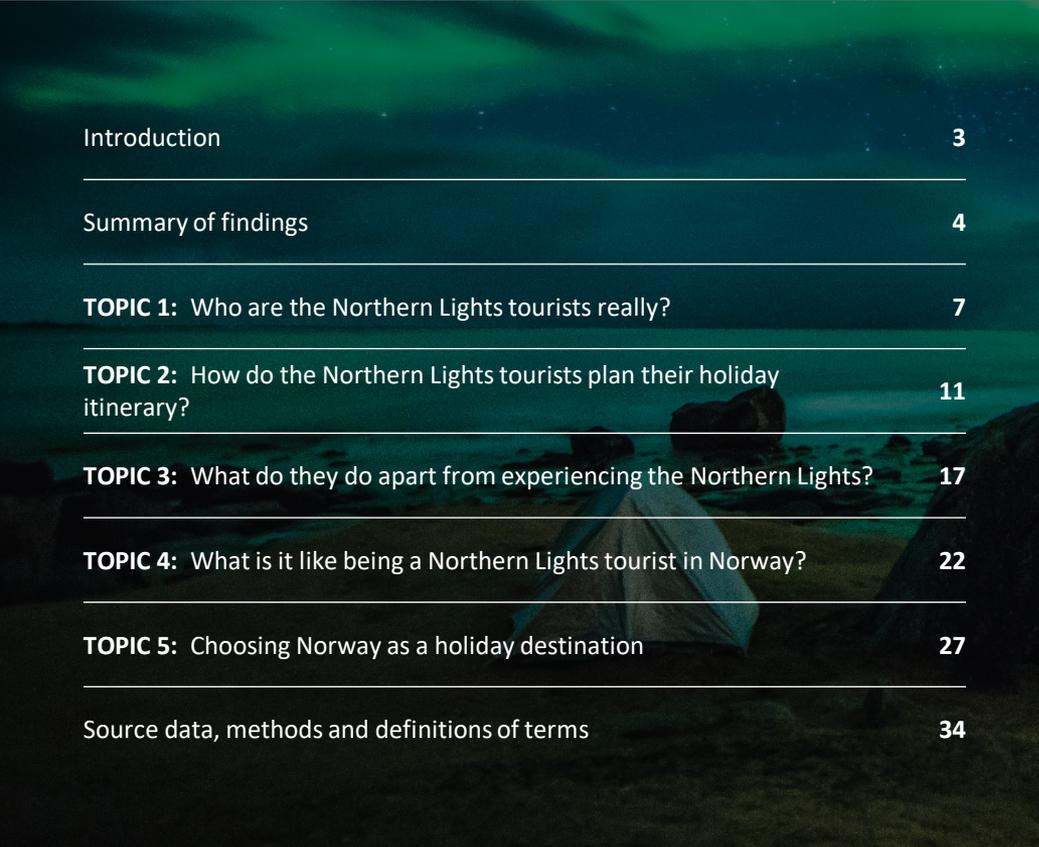


NORTHERN LIGHTS TOURISM

TOURISM SURVEY – WINTER 2019

INNOVATION NORWAY



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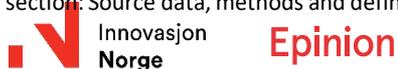
INTRODUCTION

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This report aims to provide a deeper insight into the foreign Northern Lights tourists who visited Norway during the winter season 2019.¹

Norway is one of the best places in the world to experience the Northern Lights. This magical and truly unique phenomenon attracts thousands of tourists to Norway each year. But who are these Northern Lights tourists really and how do they differ from other winter tourists? The results presented in this report indicate, among other things, that the Northern Lights tourists spend a lot of money, are very engaged in local activities and are generally very satisfied with their stay. Therefore, this is both an interesting and important target group for Norway as a tourist destination. We take a closer look at this and other findings in this report.

The report focuses on the foreign Northern Lights tourists in Norway and is based on 2,128 interviews. It was produced by Epinion on behalf of Innovation Norway and is divided into five different topics, with each topic introduced by a brief description of its content. You can read more about the reporting approach used and see a detailed overview of the source data in the final section: Source data, methods and definitions of terms.



- 1. Topic 1: Who are the Northern Lights tourists really?** To begin with, we provide an overview of the expenditure, volume and nationality of the Northern Lights tourists in Norway.
- 2. Topic 2: How do they holiday?** Here we take a closer look at the Northern Lights tourists' form of accommodation, means of transport to Norway and their daily expenditure.
- 3. Topic 3: What else do they do?** In this topic we take a closer look at the Northern Lights tourists' preferred activities in Norway, as well as the purpose of their holiday.
- 4. Topic 4: What is it really like being a Northern Lights tourist in Norway?** We look at the satisfaction and willingness to recommend of the Northern Lights tourists in Norway, and examine this in light of overtourism and their perception of Norway as a sustainable tourist destination.
- 5. Topic 5: Choosing Norway as a holiday destination.** Finally, we take a closer look at the Northern Lights tourists' expectations with respect to their trip to Norway.

For more information about the report's source data, please see the methods section of this report.

¹The report is based on data collected in the period January-April 2019.

We hope you enjoy reading the report!

SUMMARY OF FINDINGS



Northern Lights tourists are a unique group of winter tourists

Northern Lights tourists are a unique target group with their own preferences and purposes behind their holidays. For example, only 5% of the Northern Lights tourists are also skiing tourists. Therefore, this indicates that this is a group of winter tourists who visit with the express purpose of experiencing the Northern Lights.



“A once in a lifetime experience”

Northern Lights tourists are characterised by the fact that they plan their trips well in advance and say themselves that unique experiences are decisive in their choice of travel destination. Even though Norway as a whole generally enjoys high degrees of satisfaction and willingness to recommend, we can see that the Northern Lights tourists are even more satisfied and willing to recommend.



Northern Lights tourists spend a lot of money

Northern Lights tourists often take part in more activities that cost money. For example, one in three Northern Lights tourists goes dog sledding. This is also reflected in their high daily expenditure. We can also see that many of them take their time when they visit Norway. This correlates with the fact that they see this as a “*once in a lifetime experience*”.



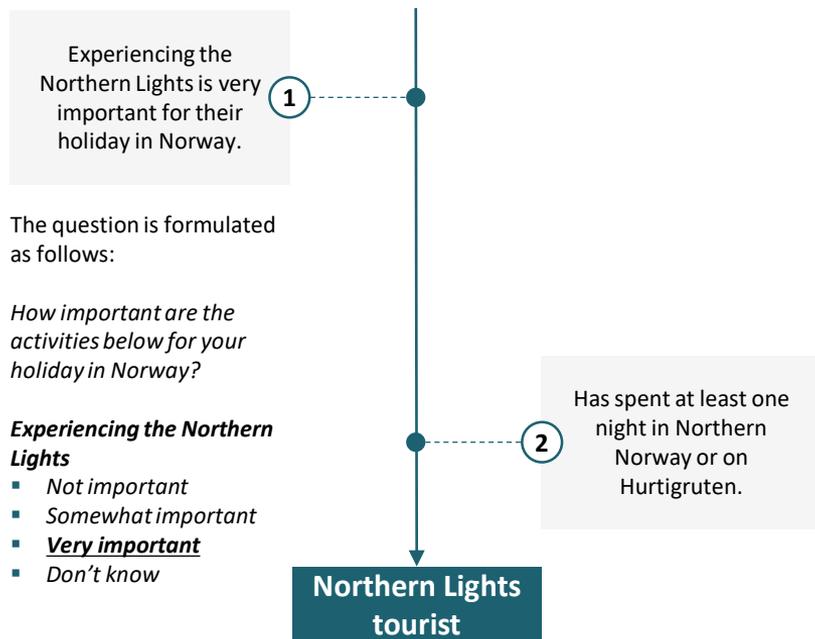
Northern Lights tourists are often older married couples

Many of those who visit Norway on holiday to experience the Northern Lights are older married couples travelling without children.

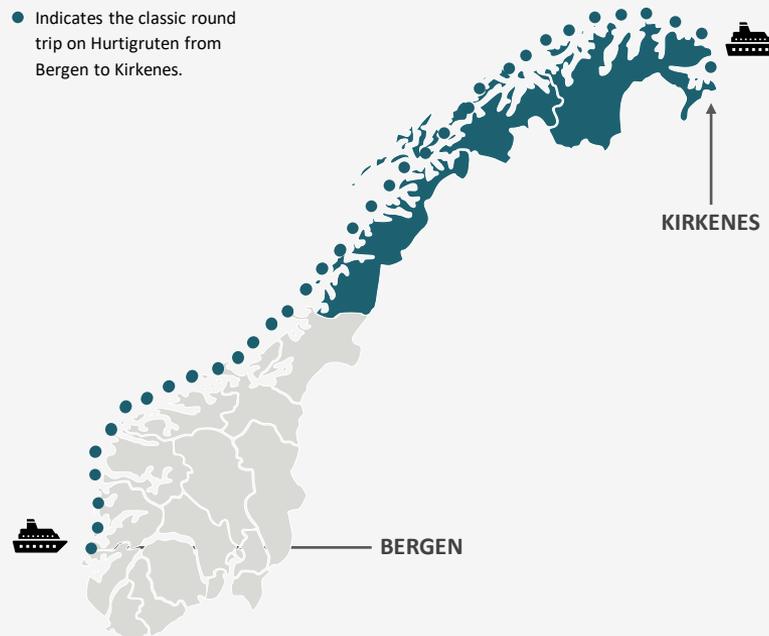
We can also see that tourists from Germany and the UK represent the largest markets for Northern Lights tourism.

DEFINITION OF A NORTHERN LIGHTS TOURIST

Here, a Northern Lights tourist is defined as a holidaymaker who meets **both** of the following criteria:



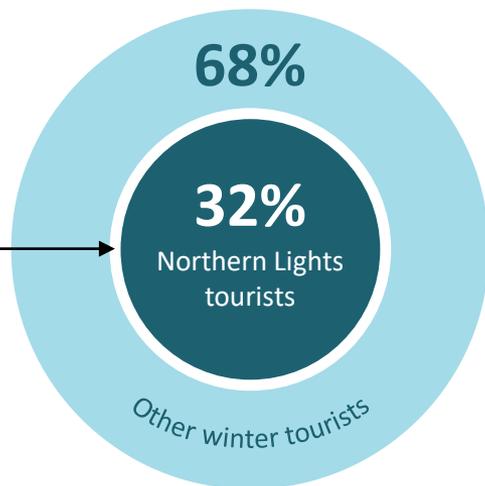
● Indicates the classic round trip on Hurtigruten from Bergen to Kirkenes.



Note: 47% of Northern Lights tourist have spent at least one night on Hurtigruten and 64% have spent at least one night in Northern Norway.

NORTHERN LIGHTS TOURISM'S SHARE OF WINTER TOURISM IN NORWAY

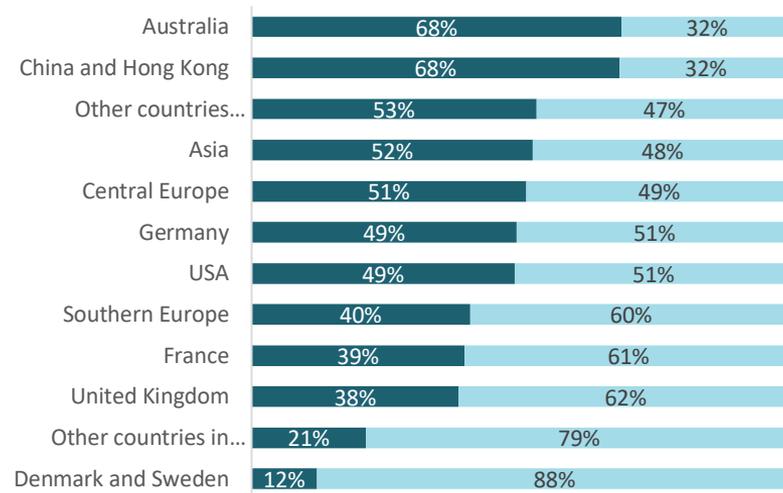
PROPORTION OF WINTER TOURISTS
IN NORWAY WHO ARE NORTHERN
LIGHTS TOURISTS



A LARGE PROPORTION OF THE NORTHERN LIGHTS TOURISTS COME FROM THE MORE FAR AWAY MARKETS

32% of the foreign tourists in the winter season 2019 were precisely Northern Lights tourists – i.e. they stated that experiencing the Northern Lights was very important for their holiday and that they stayed in either Northern Norway or on Hurtigruten (ref. previous page). The remaining 68% of winter tourists includes skiing tourists and city holiday tourists. Breaking this down further by the foreign markets indicates that it is especially Australia, China and Hong Kong that stand out with respect to Northern Lights tourism, with shares of no less than 68%. In contrast, only 12% of the winter tourists from Denmark and Sweden can be defined as Northern Lights tourists, for example.

DISTRIBUTION OF NORTHERN LIGHTS TOURISTS AND OTHER WINTER TOURISTS BY MARKET



■ Northern Lights tourists



TOPIC 1: WHO ARE THE NORTHERN LIGHTS TOURISTS REALLY?

To begin with, we take a closer look at who the Northern Lights tourists really are. Here, we look more closely at, among other things, where they come from, their characteristics and who they travel with. What is unique about the Northern Lights tourists and how do they differ from other winter tourists?

WHERE DO THE NORTHERN LIGHTS TOURISTS COME FROM?

ALMOST ONE IN FIVE OF ALL NORTHERN LIGHTS TOURISTS ARE FROM GERMANY

Germany represented the largest foreign market for Northern Lights tourists in the winter season 2019, with a share of 17%. The second largest market was the UK with a share of 14%.

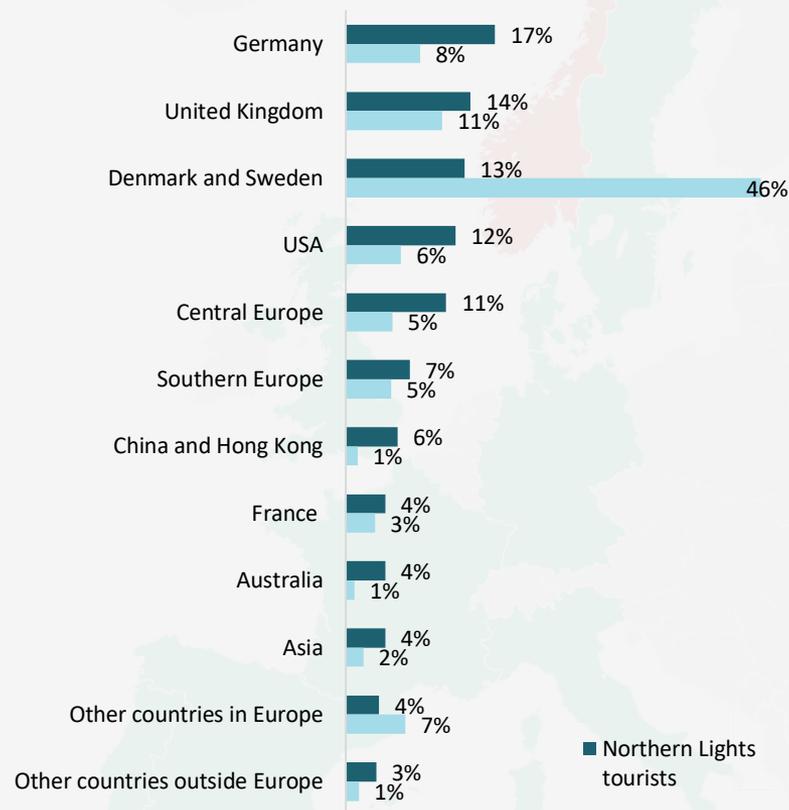
A RELATIVELY SMALL PROPORTION OF WINTER TOURISTS FROM OUR NEIGHBOURING COUNTRIES ARE NORTHERN LIGHTS TOURISTS

Our neighbouring countries, Denmark and Sweden, often account for a relatively large proportion of the tourists in Norway. On the other hand, when it comes to Northern Lights tourism, Denmark and Sweden are not the largest foreign markets, even though they account for a large proportion of other winter tourism (46%).

Did you know...?

Among young Northern Lights tourists (18-34), a larger proportion come from China and Hong Kong (11%), while a smaller proportion come from the UK (6%) and Germany (11%).

NATIONALITY BREAKDOWN OF NORTHERN LIGHTS TOURISTS AND OTHER WINTER TOURISTS



Note: The distribution of the foreign tourists' overnight accommodation was based on the random sample (Tourism Survey).

NORTHERN LIGHTS TOURISTS TRAVELLING COMPANIONS

FEW NORTHERN LIGHTS TOURISTS TRAVEL WITH CHILDREN

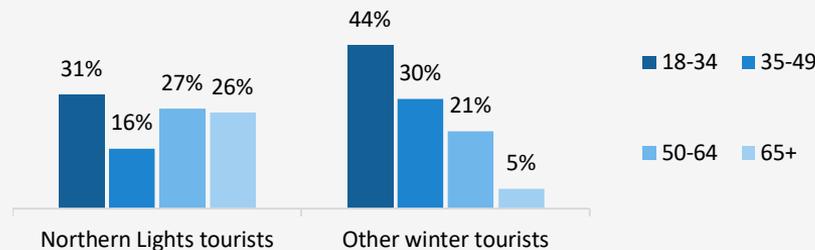
Around half of the Northern Lights tourists state that they are travelling as a couple, i.e. people travelling with a spouse/partner or boyfriend/ girlfriend (48%). The remaining proportions mainly consist of Northern Lights tourists who either state they are travelling with others (25%) or travelling with other family members (18%). Only 4% of the Northern Lights tourists were travelling with children.

In contrast, we can see that a significantly larger proportion of the other winter tourists can be categorised as families with children. Around one in four of the other winter tourists state that they are travelling together with at least one child under 18.

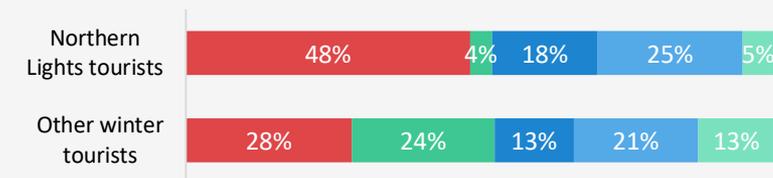
MANY NORTHERN LIGHTS TOURISTS ARE OLDER

The fact that the proportion of families with children is small is also reflected when you look at age distribution. We can see that the Northern Lights tourists are often older, with more than half being over 50. In contrast, only about one in four of the other winter tourists are over 50. On the other hand, we can also see that a relatively large proportion of the Northern Lights tourists belong to the youngest age group, 18-34.

DISTRIBUTION OF RESPONDENTS BY AGE



TRAVELLING COMPANIONS



- 
Couples
 People travelling with a spouse/partner or boyfriend/girlfriend
- 
Families with children
 People travelling with at least one child under the age of 18
- 
Trips with other family members
 People travelling with children over the age of 18/other family members
- 
Travelling with others
 People travelling with colleagues, friends, a tour group or others
- 
Travelling alone
 People travelling alone



TOPIC 2: HOW DO THE NORTHERN LIGHTS TOURISTS PLAN THEIR HOLIDAY ITINERARY?

The Northern Lights tourists plan their holiday itineraries in slightly different ways. Some choose to spend a long period in Norway, while others choose to spend just a few nights. Nevertheless, we can see that the Northern Lights tourists generally stay longer in Norway than other winter tourists. In this topic, we want to look more closely at who these people are, the means of transport they use to get to Norway, and their expenditure.

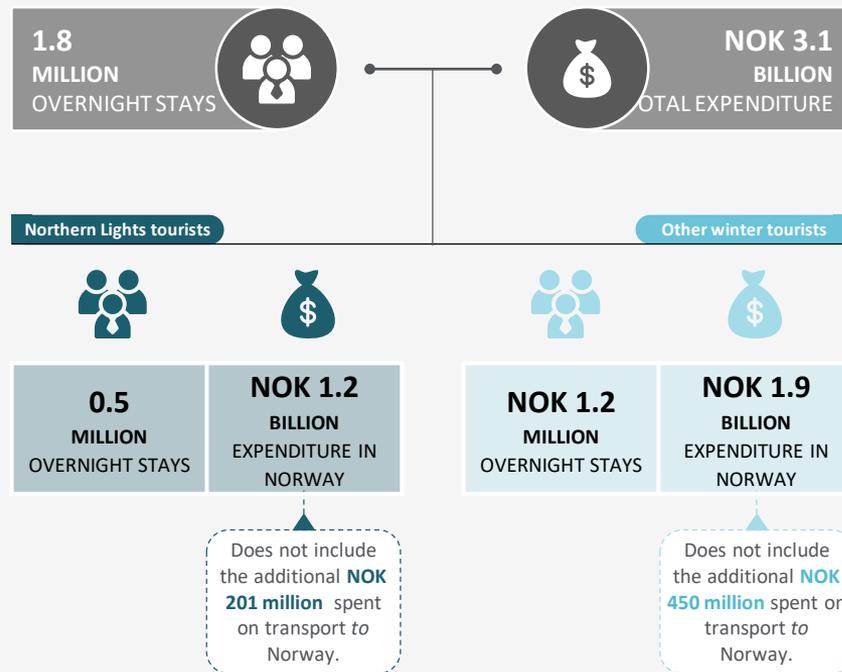
THE NORTHERN LIGHTS TOURISTS' OVERALL VOLUME AND EXPENDITURE

NORTHERN LIGHTS TOURISTS ACCOUNT FOR ALMOST 40% OF THE OVERALL EXPENDITURE OF WINTER TOURISTS

Even though the Northern Lights tourists 'only' account for around one in four of the overnight stays made by winter tourists, they nevertheless account for almost 40% of the overall expenditure. This indicates that the daily expenditure of the Northern Lights tourists is high and significantly higher than that of other winter tourists.

Note: Please remember that the figures are only based on the period January-April 2019.

OVERALL VOLUMES AND EXPENDITURE FOR FOREIGN WINTER TOURISM IN NORWAY



THE NORTHERN LIGHTS TOURISTS' ACCOMMODATION AND TRAVELLING COMPANIONS

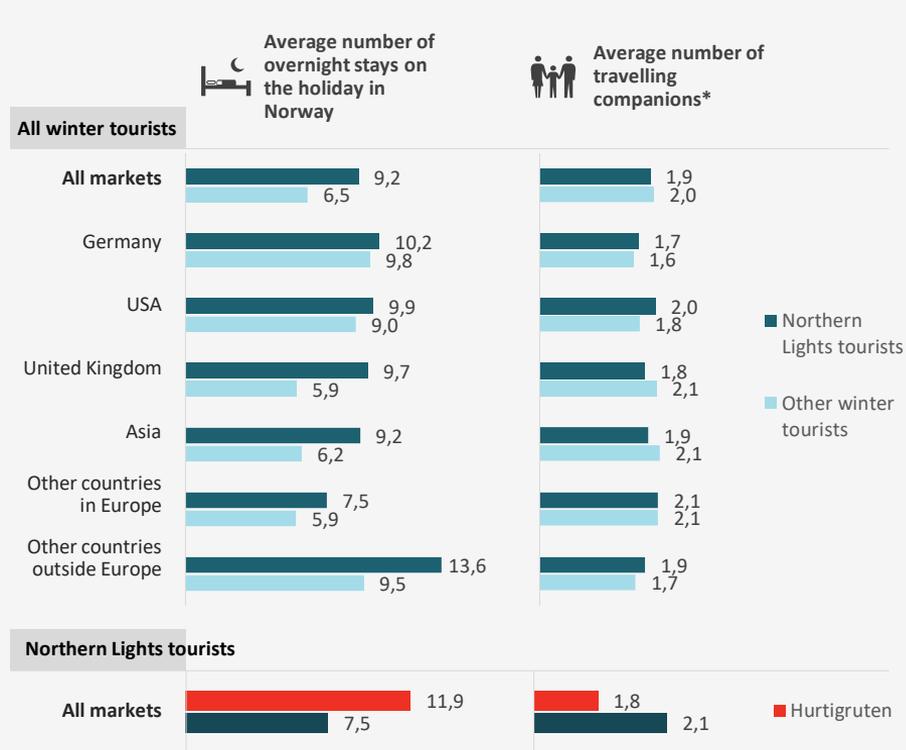
THE NORTHERN LIGHTS TOURISTS OFTEN SPEND LONGER ON HOLIDAY IN NORWAY

On average, the Northern Lights tourists spend 9.2 nights of their holiday in Norway, while the average for other winter tourists is 6.5 nights. When you look at this distributed in the various foreign markets, you can see that this generally applies, regardless of the market. 47% of the foreign Northern Lights tourists spend at least one night on Hurtigruten, where many of them want to experience the Northern Lights. A round trip on Hurtigruten lasts 11 days and we can, therefore, also see that it is especially the Northern Lights tourists on Hurtigruten that stay longer in Norway, with an average of 11.9 overnight stays.

THERE ARE MINOR DIFFERENCES BETWEEN THE WINTER TOURISTS WITH RESPECT TO NUMBER OF TRAVELLING COMPANIONS

On the other hand, the average number of travelling companions indicates there are minor differences between the winter tourists, both in relation to the type of winter tourist as well as between the markets. Here we can see that the Northern Lights tourists have an average of 1.9 travelling companions, while other winter tourists have an average of 2.0 people. In contrast to total overnight stays, here it is the mainland tourists in Northern Norway who pull up the average with respect to travelling companions with their average of 2.1 people.

AVERAGE NUMBER OF OVERNIGHT STAYS IN NORWAY AND NUMBER OF TRAVELLING COMPANIONS IN THE DIFFERENT MARKETS



* Travelling companions specifies the number of people with whom the respondent is sharing expenses. Therefore, the total number of people in the travel group may be higher.

THE NORTHERN LIGHTS TOURISTS' OVERNIGHT STAYS DISTRIBUTED BY TYPE OF ACCOMMODATION

A RELATIVELY LARGE PROPORTION OF THE NORTHERN LIGHTS TOURISTS USE AIRBNB ACCOMMODATION

The figure on the right shows the distribution of the Northern Lights tourists' overnight stays by accommodation type. This shows that 40% of all the Northern Lights tourists choose accommodation on Hurtigruten and 33% choose hotel accommodation.

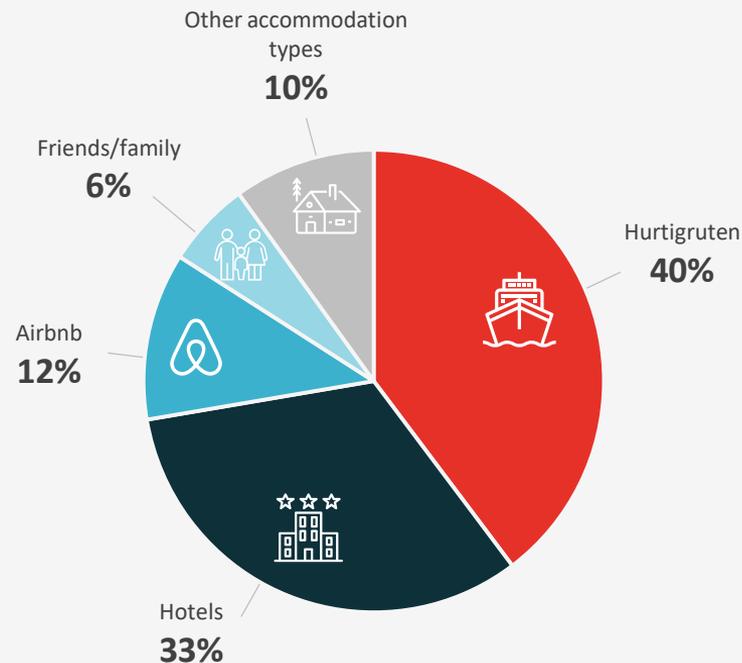
It is also worth noting that a relatively large proportion of the Northern Lights tourists use Airbnb accommodation, with a proportion of no less than 12%.



Did you know...?

No less than 23% of the young Northern Lights tourists (18-34) use Airbnb accommodation, while only 9% use Hurtigruten.

DISTRIBUTION OF THE NORTHERN LIGHTS TOURISTS' OVERNIGHT STAYS BY ACCOMMODATION TYPE



Note: "Other type of accommodation" includes hostels, rented cabins, own cabins, private rental other than Airbnb, as well as various types of camping.

TRANSPORT TO NORWAY

THE VAST MAJORITY OF THE NORTHERN LIGHTS TOURISTS FLY TO NORWAY

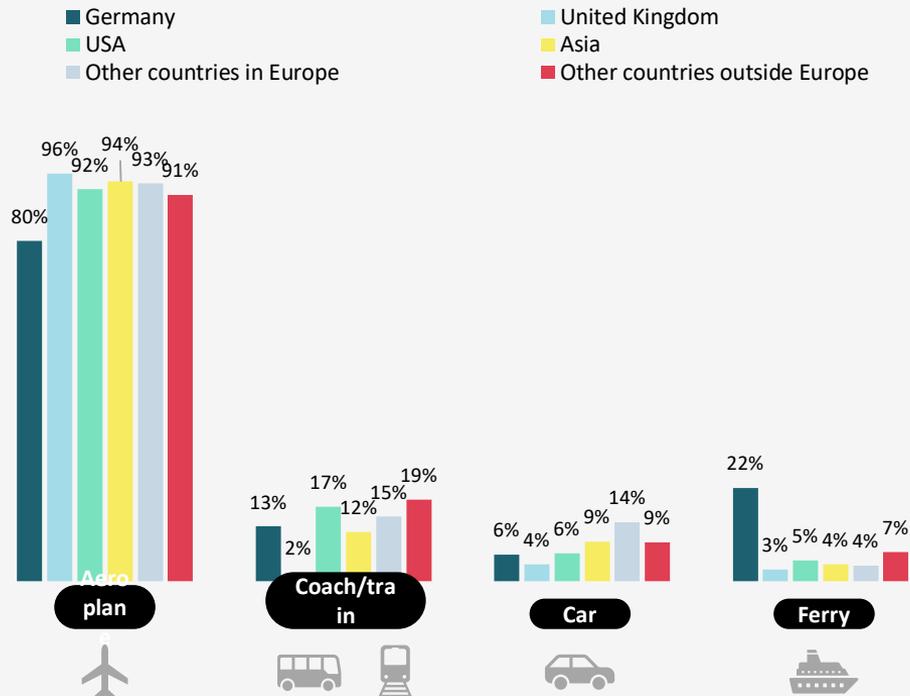
On the right is an overview of the Northern Lights tourists' means of transport to Norway. This is further broken down by the four largest foreign markets for the Northern Lights tourists. Here we can see that the vast majority of the Northern Lights tourists choose to fly as their primary means of transport to Norway. This is of course not surprising given that the Northern Lights are often experienced in the north of the country, which is the part of Norway that is most difficult for the vast majority of markets to get to using means of transport other than flying.

Nevertheless, we can see that a relatively large proportion of the German Northern Lights tourists (22%) also use a ferry as a means of transport to Norway. However, it is worth noting here that the majority of those who have chosen coach/train have also chosen flying or ferry as a means of transport to Norway since it is possible to choose multiple means of transport to Norway.

Note I: A new feature of the questionnaire for 2019 is that it is now possible to choose multiple means of transport if one has used more than one on the journey to Norway. The figures therefore add up to more than 100%.

The question is formulated as follows: Which means of transport did you primarily use to travel to Norway on this trip?

THE NORTHERN LIGHTS TOURISTS' MEANS OF TRANSPORT TO NORWAY



Note II: This distribution is based on the four largest nationalities from the random sample (see page 9).

TRANSPORT IN NORWAY

MANY NORTHERN LIGHTS TOURISTS COMBINE MULTIPLE MEANS OF TRANSPORT ON THEIR HOLIDAY TRAVEL TO AND IN NORWAY

On this page we want to focus on the means of transport for travel in Norway. In the figure on the right, transport *in* Norway is distributed between two primary means of transport options *to* Norway: aeroplane or ferry.

Here we can see that of the 91% of the Northern Lights tourists who choose flying as their primary means of transport *to* Norway, around half of them also travel *in* Norway by flying, although 39% of them also use a coach/train.

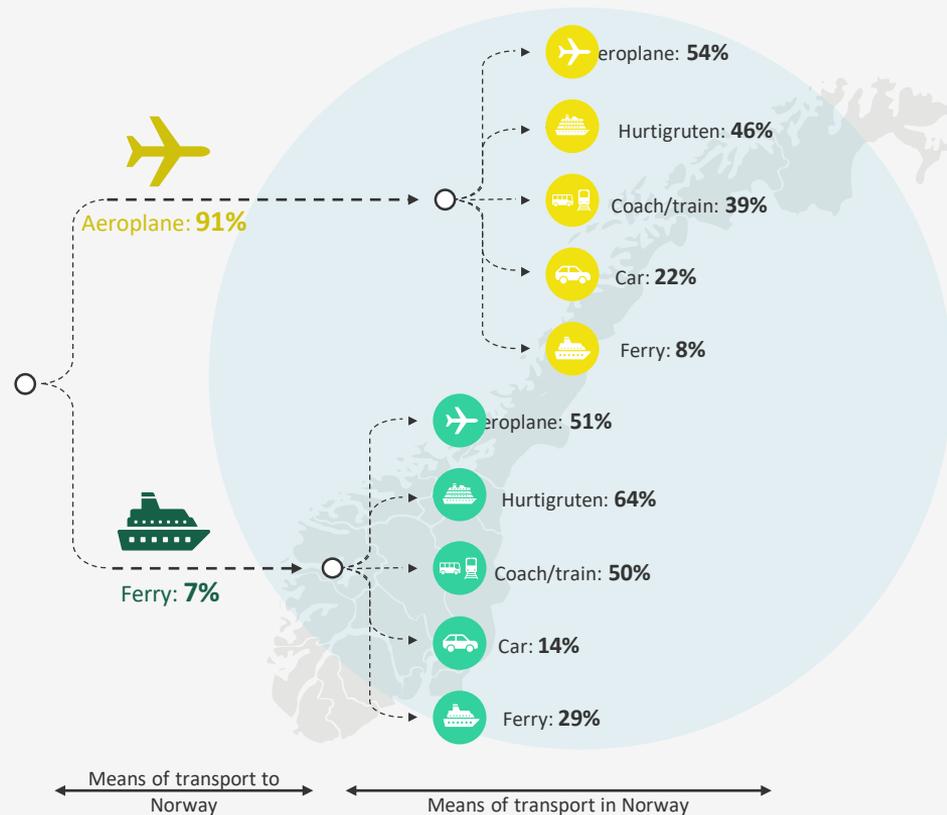
As in the case of means of transport to Norway, it is also possible to choose multiple means of transport for means of transport in Norway. Therefore, this means that even if many state that they use a coach/train as a means of transport in Norway, this is often in combination with other means of transport.



Did you know...?

62% of the Northern Lights tourists that travel around Norway by coach/train also travel via domestic flights.

WHICH MEANS OF TRANSPORT DO THE NORTHERN LIGHTS TOURISTS USE FOR THEIR TRAVEL TO AND IN NORWAY?



Note: Only a selection of means of transport are shown in the figure for the sake of clarity. Please note that it is possible to choose more than one means of transport in the question. The question is formulated as follows: Which means of transport have you primarily used/will primarily use while you are in Norway?

THE NORTHERN LIGHTS TOURISTS' DAILY EXPENDITURE

NORTHERN LIGHTS TOURISTS GENERALLY SPEND SIGNIFICANTLY MORE THAN OTHER WINTER TOURISTS

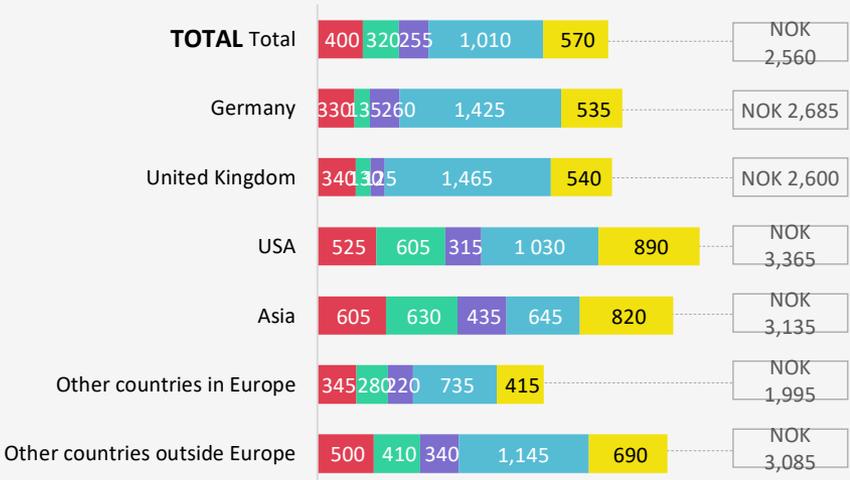
Northern Lights tourists have an average daily expenditure of NOK 2,560, while the daily expenditure of other winter tourists is NOK 1,670. In other words, Northern Lights tourists generally have a higher daily expenditure than other winter tourists, and on average almost NOK 900 more per 24-hour period. The high expenditure among foreign Northern Lights tourists applies almost regardless of nationality.

Breaking this down further by the markets shows that it is the Northern Lights tourists from the US and Asia in particular that have a high daily expenditure, with average expenditure of NOK 3,365 and NOK 3,135 per 24-hour period, respectively.

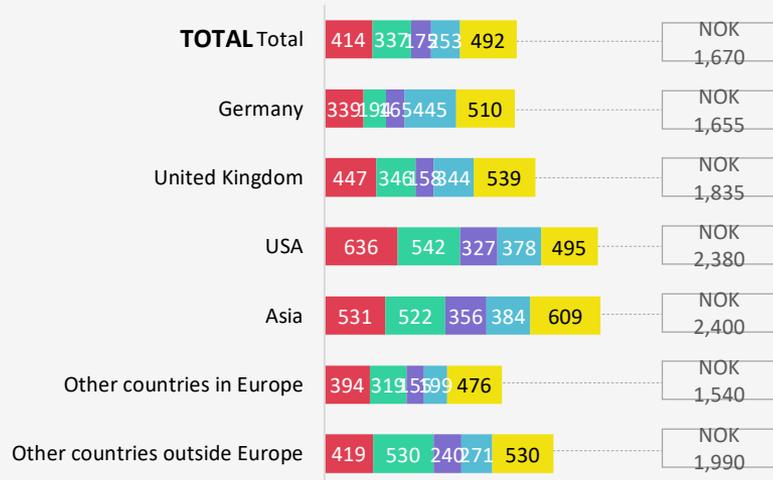
AVERAGE DAILY EXPENDITURE DISTRIBUTED BY MARKET



Northern Lights tourists



Other winter tourists

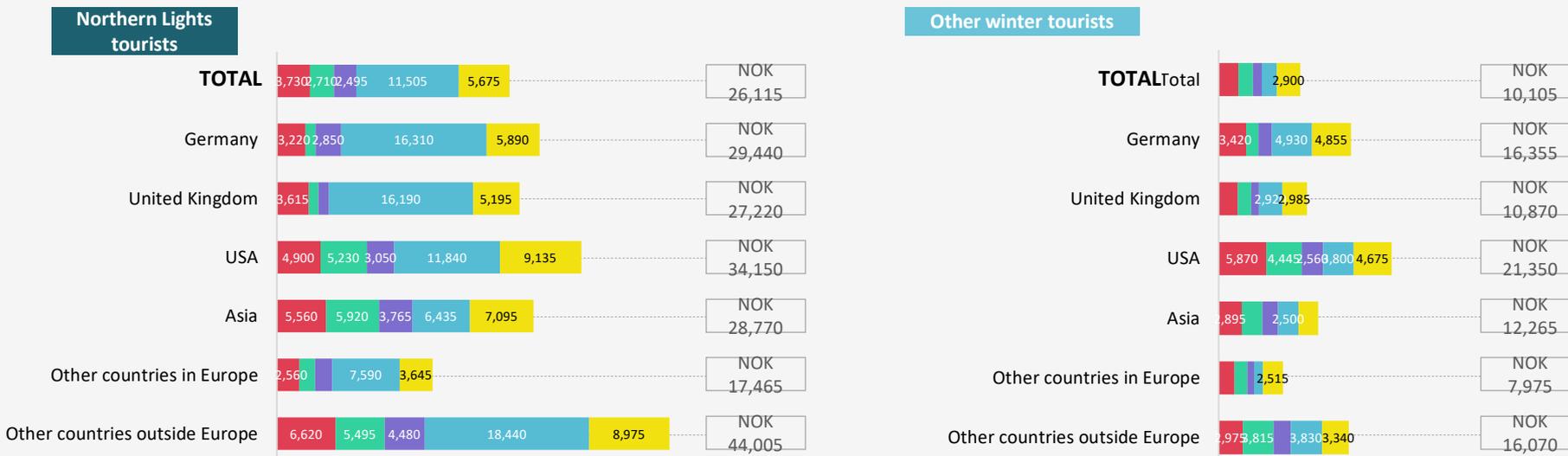


THE NORTHERN LIGHTS TOURISTS' TOTAL EXPENDITURE PER PERSON

THE DIFFERENCES IN EXPENDITURE ARE PERHAPS EVEN CLEARER WHEN ONE LOOKS AT OVERALL EXPENDITURE

This page shows the average total expenditure per person for the entire trip, instead of per 24-hour period as on the previous page. The differences in expenditure between the Northern Lights tourists and other winter tourists are perhaps even clearer here. The large differences are partly due to the daily expenditure (ref. previous page) and partly due to the fact that the Northern Lights tourists generally often stay longer in Norway than other winter tourists. The average total expenditure for the Northern Lights tourists is around NOK 26,000 per person. Of the different expenditure items, it is often the expenditure on transport to Norway and, to some extent, the expenditure on packages, that can be regarded as contributing less to local revenues. On the other hand, we can see here that the expenditure on transport to Norway only accounts for a minor proportion of the overall expenditure for the trip for most markets.

AVERAGE TOTAL EXPENDITURE PER PERSON DISTRIBUTED BY MARKET

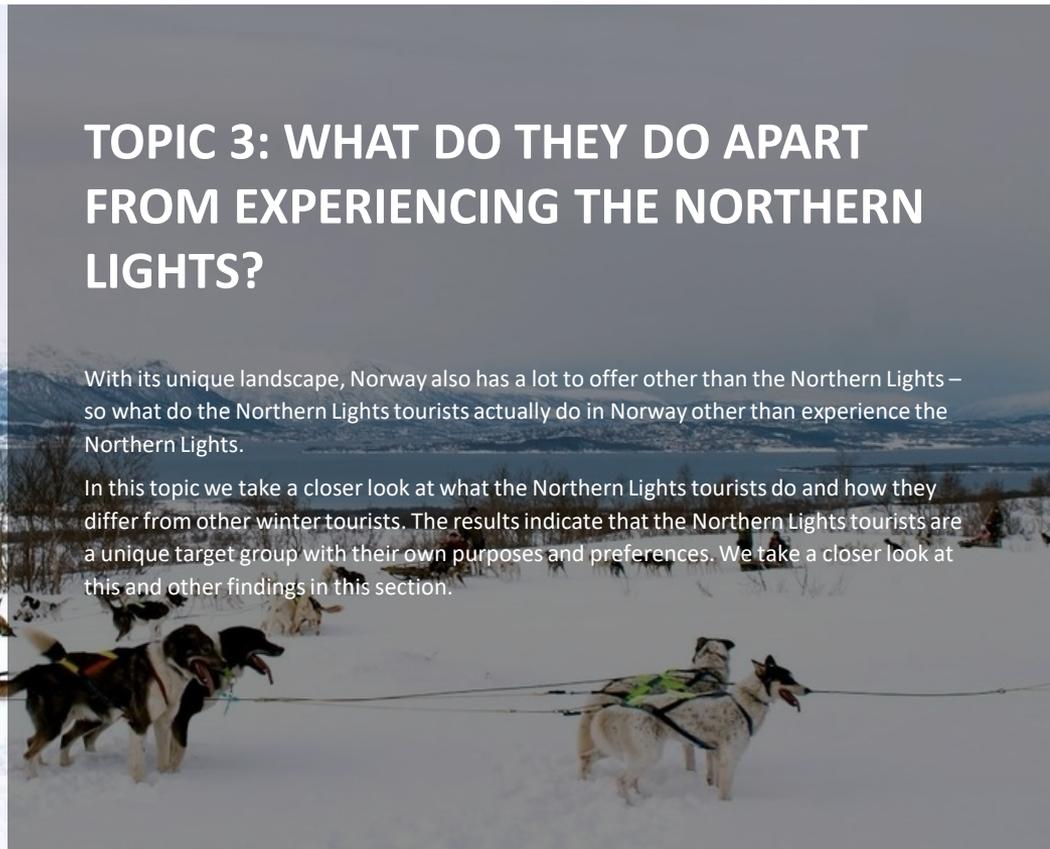


Note: For the sake of clarity, amounts of less than NOK 2,000 have not been included in the figure.

TOPIC 3: WHAT DO THEY DO APART FROM EXPERIENCING THE NORTHERN LIGHTS?

With its unique landscape, Norway also has a lot to offer other than the Northern Lights – so what do the Northern Lights tourists actually do in Norway other than experience the Northern Lights.

In this topic we take a closer look at what the Northern Lights tourists do and how they differ from other winter tourists. The results indicate that the Northern Lights tourists are a unique target group with their own purposes and preferences. We take a closer look at this and other findings in this section.



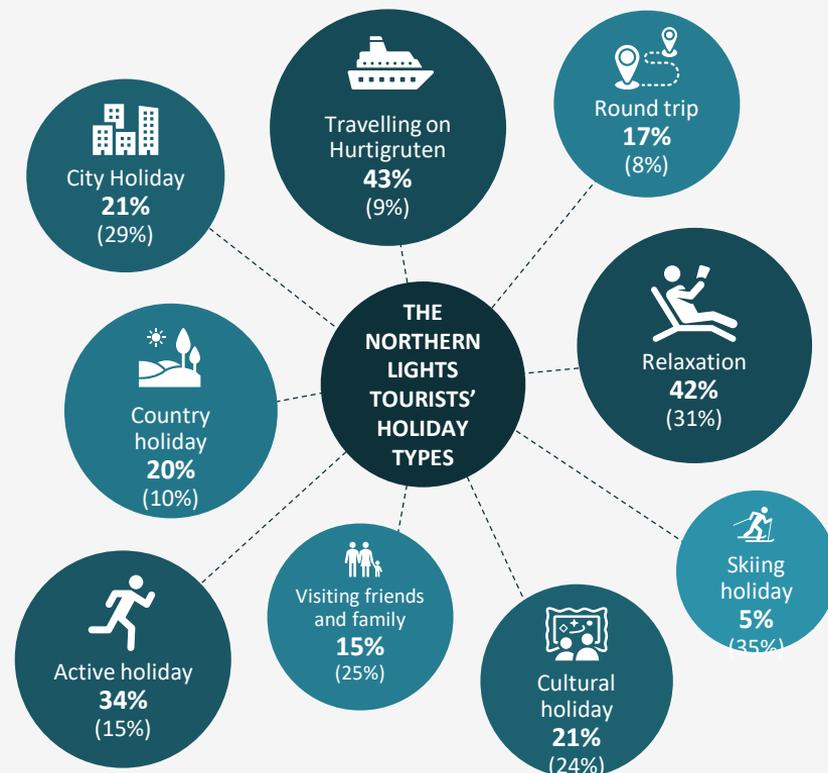
PURPOSE OF THE HOLIDAY

THERE ARE TWO FACTORS IN PARTICULAR THAT DISTINGUISH NORTHERN LIGHTS TOURISTS FROM OTHER WINTER TOURISTS

The figure on the right shows what winter tourists state as the purpose of their holiday. Here there are two factors in particular that distinguish Northern Lights tourists from other winter tourists. Travelling on Hurtigruten and having a relaxing holiday were more likely to be stated by the Northern Lights tourists than the other winter tourists, with proportions of 43% and 42%, respectively. In contrast, a skiing holiday and city holiday were stated by more other winter tourists, with proportions of 35% and 29%, respectively.

It was possible to choose more than one purpose for the holiday. In those cases where this was done, all of the types of holiday specified are included.

PROPORTION WHO STATED THE FOLLOWING PURPOSE OF THE HOLIDAY



XX% = Figures in bold state the percentages for the Northern Lights tourists.
(XX%) = Figures in brackets state the percentages for other winter tourists.

IMPORTANCE OF DIFFERENT EXPERIENCES FOR THE HOLIDAY IN NORWAY

EXPERIENCES ARE GENERALLY IMPORTANT FOR THE NORTHERN LIGHTS TOURISTS

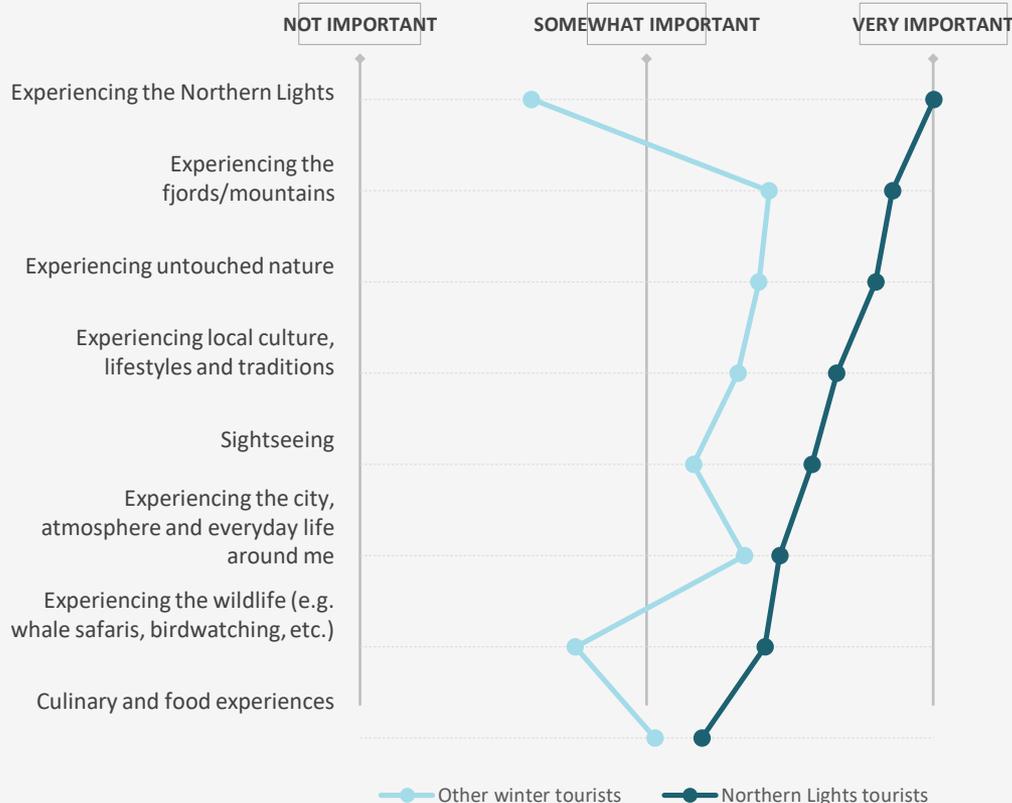
We can see that all of the experiences are regarded as important for the Northern Lights tourists in Norway, but also more important than for the other winter tourists.

Naturally, experiencing the Northern Lights is the most important experience for the Northern Lights tourists (ref. the definition of a Northern Lights tourist), but so is, for example, experiencing the wildlife and sightseeing.

Furthermore, it is worth noting that almost all the Northern Lights tourists state that experiencing the fjords/mountains and the untouched nature is very important for their holiday in Norway.

Note: "Don't know" has been excluded in the calculation of the average. Between 1% and 7% responded "Don't know" to the various questions.

HOW IMPORTANT ARE THE FOLLOWING EXPERIENCES FOR YOUR CURRENT HOLIDAY IN NORWAY? (Average)



WHAT ACTIVITIES DO THE NORTHERN LIGHTS TOURISTS DO IN NORWAY?

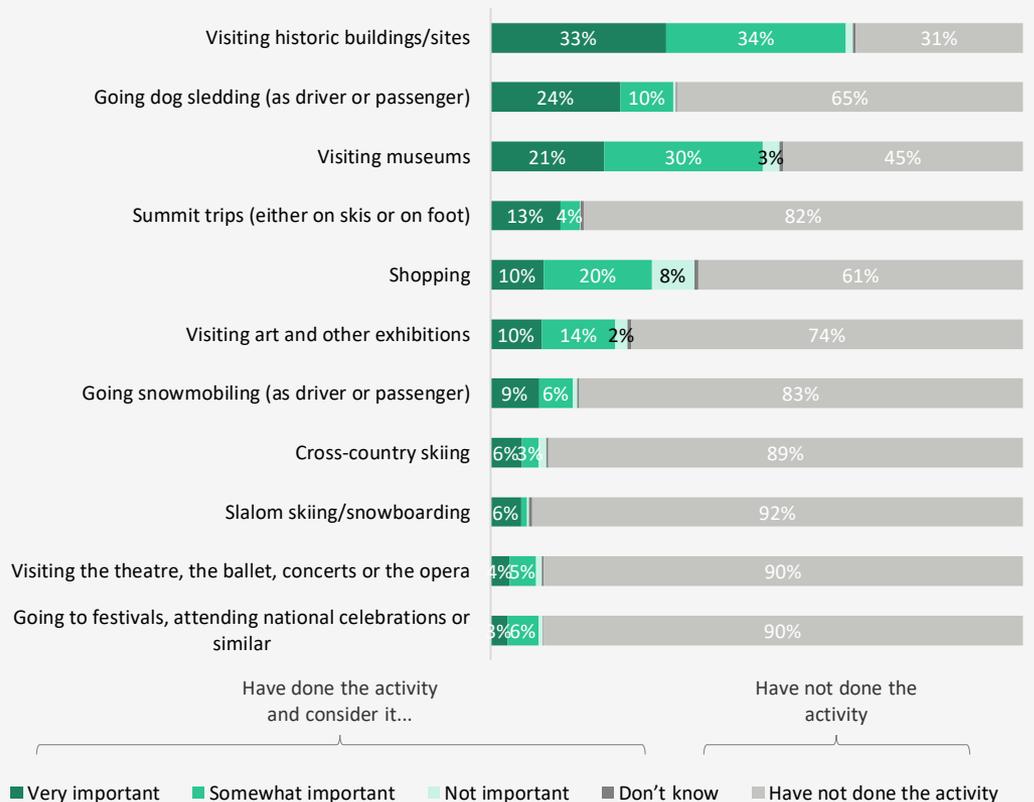
MANY NORTHERN LIGHTS TOURISTS CONSIDER GOING DOG SLEDDING IMPORTANT FOR THEIR HOLIDAY

The figure on the right shows the distribution of the Northern Lights tourists' activities based on their importance for their holiday in Norway.

It is worth noting that one in every three Northern Lights tourists has been dog sledding, and that the largest proportion also considers this activity *important* (very important + somewhat important) for their holiday in Norway. This is completely unique to this target group and interesting since this can also be described as an expensive activity in which the money spent largely remains in the local community.

It is also evident that visiting historic buildings/sites and visiting museums are also two activities that stand out among the Northern Lights tourists. Here we can see that 67% and 51%, respectively, consider these activities *important* for their holiday in Norway.

DISTRIBUTION OF THE NORTHERN LIGHTS TOURISTS' ACTIVITIES BY IMPORTANCE FOR THEIR HOLIDAY IN NORWAY



Note: For the sake of clarity, percentages of less than 2% have not been included in the figure.

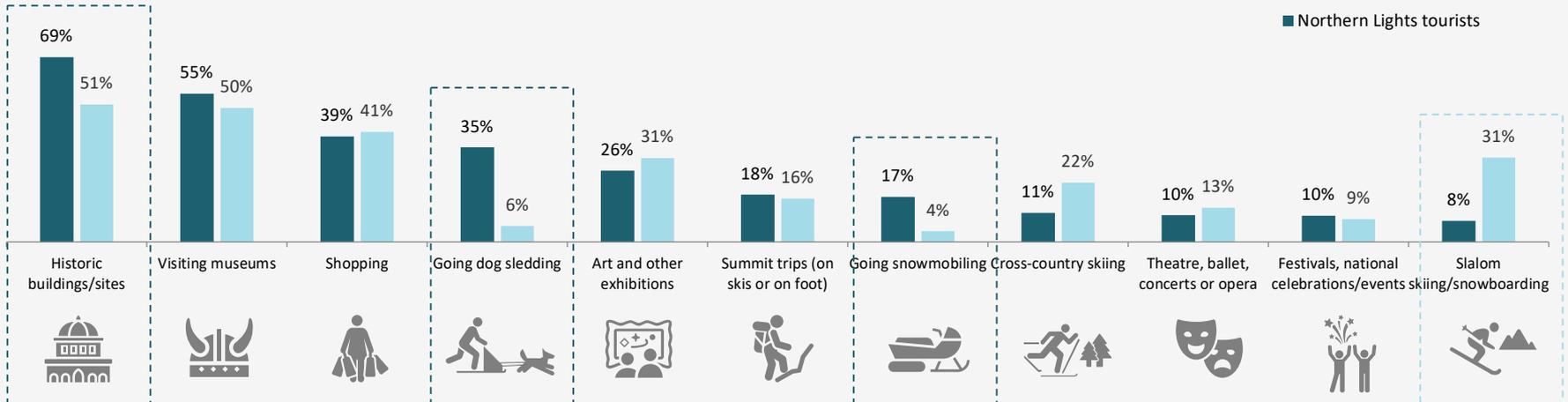
WHICH ACTIVITIES DO THE NORTHERN LIGHTS TOURISTS DO COMPARED WITH OTHER WINTER TOURISTS?

A SIGNIFICANTLY LARGER PROPORTION OF THE NORTHERN LIGHTS TOURISTS GO DOG SLEDDING THAN OTHER WINTER TOURISTS

The figure below shows an overview of the activities the Northern Lights tourists do compared with other winter tourists in Norway. Here we can see that the largest proportion of the Northern Lights tourists visit historic buildings/sites and museums. When the Northern Lights tourists are compared with other winter tourists, we can also see that a large proportion of the Northern Lights tourists also go dog sledding and snowmobiling. For example, 35% of the Northern Lights tourists state they have been dog sledding, while the figure is only 6% for other winter tourists.

THE PROPORTION WHO STATE THAT THEY HAVE DONE THE FOLLOWING ACTIVITIES ON THEIR HOLIDAY

 = Activities where the Northern Lights tourists stand out



Note: This figure only shows those activities that at least 5% of the Northern Lights tourists have done.



TOPIC 4: WHAT IS IT LIKE BEING A NORTHERN LIGHTS TOURIST IN NORWAY?

This topic looks at how satisfied the Northern Lights tourists are in Norway, as well as how willing they are to recommend it as a destination to others. Are there any differences between the Northern Lights tourists and other winter tourists? We look at this in light of the assessment of different factors and the degree to which the Northern Lights tourists expect and experience overtourism in Norway, as well as the extent to which Norway is perceived to be a sustainable tourist destination.

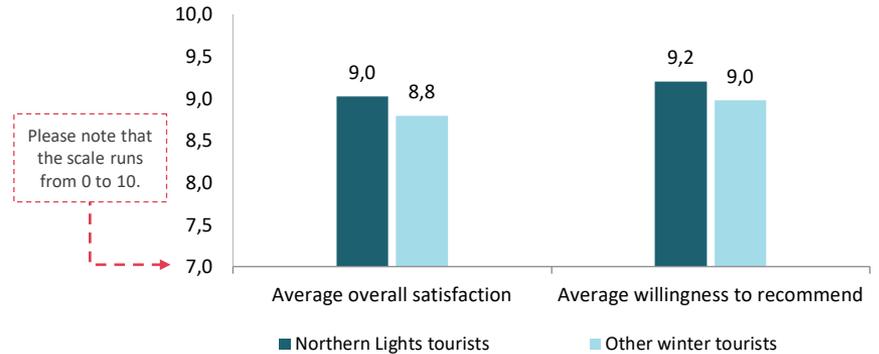
OVERALL SATISFACTION AND WILLINGNESS TO RECOMMEND AMONG THE NORTHERN LIGHTS TOURISTS IN NORWAY

OVERALL SATISFACTION AND WILLINGNESS TO RECOMMEND ARE HIGH AMONG THE NORTHERN LIGHTS TOURISTS

The figure on the right shows that overall satisfaction and willingness to recommend are high among the Northern Lights tourists in Norway. Here we can see that the Northern Lights tourists have both a higher average overall satisfaction (9.0 compared with 8.8) and a higher willingness to recommend (9.2 compared with 9.0) than other winter tourists. The table below shows the scores achieved for the assessment of the various sub-parameters of satisfaction. This shows that the Northern Lights tourists score higher on all satisfaction parameters.

 AVERAGE OVERALL SATISFACTION

 AVERAGE WILLINGNESS TO RECOMMEND



ASSESSMENT OF FACTORS (PERCENTAGE WHO ARE “VERY SATISFIED”)

 = Activities where the Northern Lights tourists particularly stand out



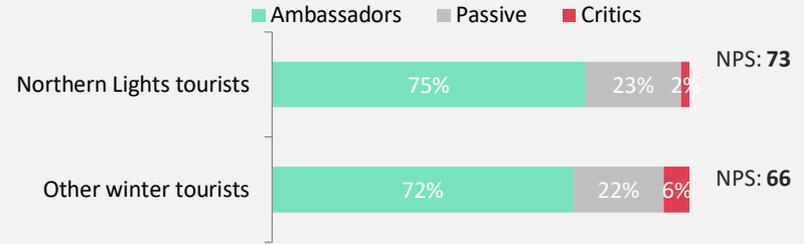
Note: The figure shows the proportion of the holidaymakers who have chosen answer option 5 (“very satisfied”) on a scale of 1 to 5.

WHAT DRIVES THE NORTHERN LIGHTS TOURISTS' WILLINGNESS TO RECOMMEND?

THE NORTHERN LIGHTS TOURISTS HAVE A HIGH 'NET PROMOTER SCORE'

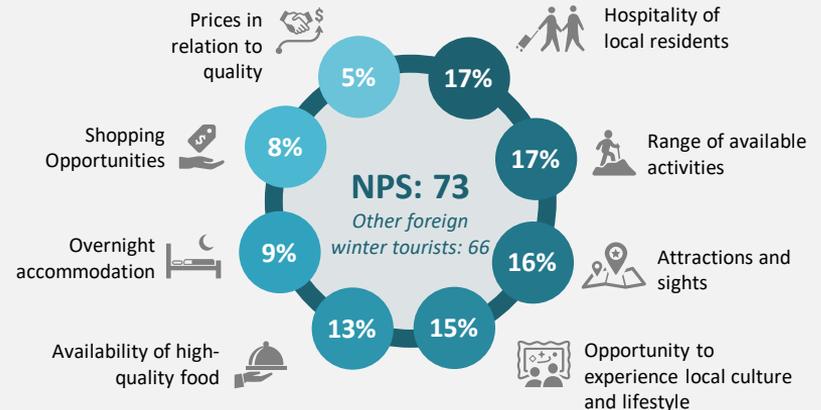
The calculation of the Net Promoter Score (NPS) shows that the Northern Lights tourists score much higher than other winter tourists. Northern Lights tourists score an NPS of 73, while other foreign winter tourists score 66. Hospitality of local residents, range of available activities and attractions and sights are the factors that particularly drive willingness to recommend among the Northern Lights tourists. Therefore, focusing on these areas could help to further increase willingness to recommend.

NPS (NET PROMOTER SCORE)*



Note: See the definition of NPS in the section on methods (page 35).

WHAT ARE THE FACTORS THAT DRIVE THE WILLINGNESS TO RECOMMEND OF THE NORTHERN LIGHTS TOURISTS IN NORWAY?



EXPECTATIONS AND EXPERIENCED OVERTOURISM IN NORWAY

THE NORTHERN LIGHTS TOURISTS EXPECT LITTLE OVERTOURISM, BUT ARE ALSO LESS BOTHERED BY THIS THAN OTHER WINTER TOURISTS

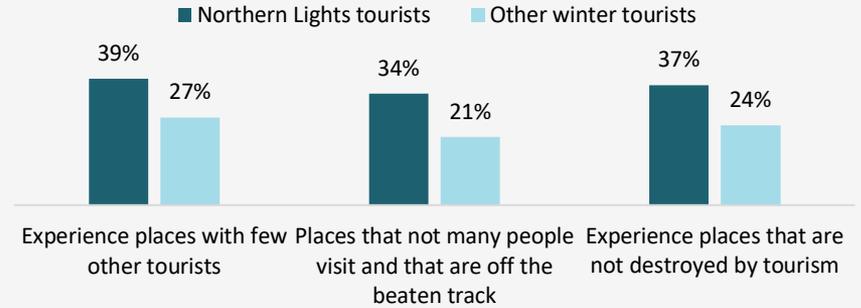
The figure in the upper right shows the proportions of *expected* overtourism in Norway among the Northern Lights tourists and other winter tourists. Here we can see that the Northern Lights tourists generally expect less overtourism in Norway than other winter tourists. For example, 39% of the Northern Lights tourists expect to experience places with few other tourists, while the corresponding proportion for other winter tourists is only 27%.

Furthermore, we can see from the proportions for *experienced* overtourism that the Northern Lights tourists are also generally less bothered by overtourism than other winter tourists. Here we can see that 78% of the Northern Lights tourists state that they did not experience any degree of overtourism in Norway, while just 1% state that they felt the places they visited were too crowded.

Did you know...?

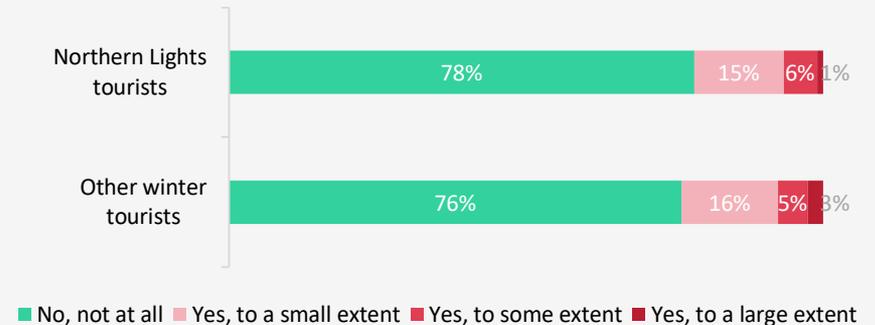
Among the Northern Lights tourists, it is especially the German tourists that state they experienced overtourism, with a proportion of 52% that state that they experienced varying degrees of this.

EXPECTATIONS REGARDING OVERTOURISM IN NORWAY



Note: The figure is based on the following question: "What expectations did you have before your trip to Norway?" The figure shows the proportion that agreed with the statement.

"THE PLACES I VISITED FELT CROWDED BECAUSE THERE WERE TOO MANY TOURISTS THERE"



OVERTOURISM AT DIFFERENT LOCATIONS

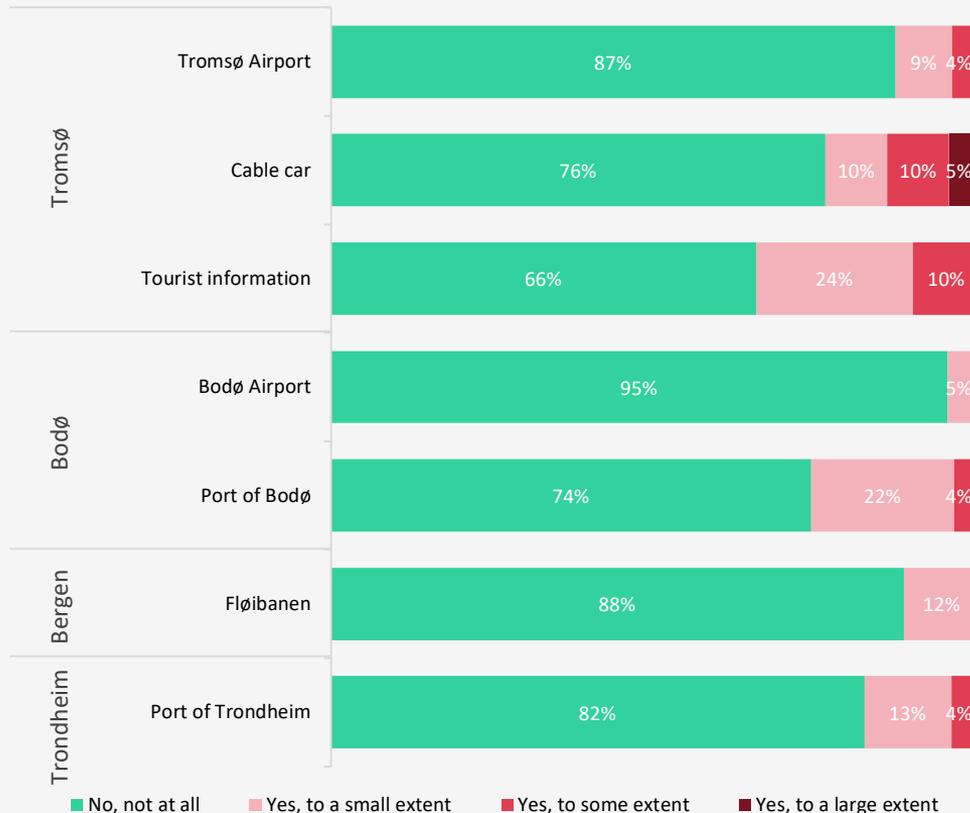
THE NORTHERN LIGHTS TOURISTS WHO VISITED TOURIST INFORMATION IN TROMSØ STATED A SOMEWHAT HIGHER DEGREE OF EXPERIENCED OVERTOURISM

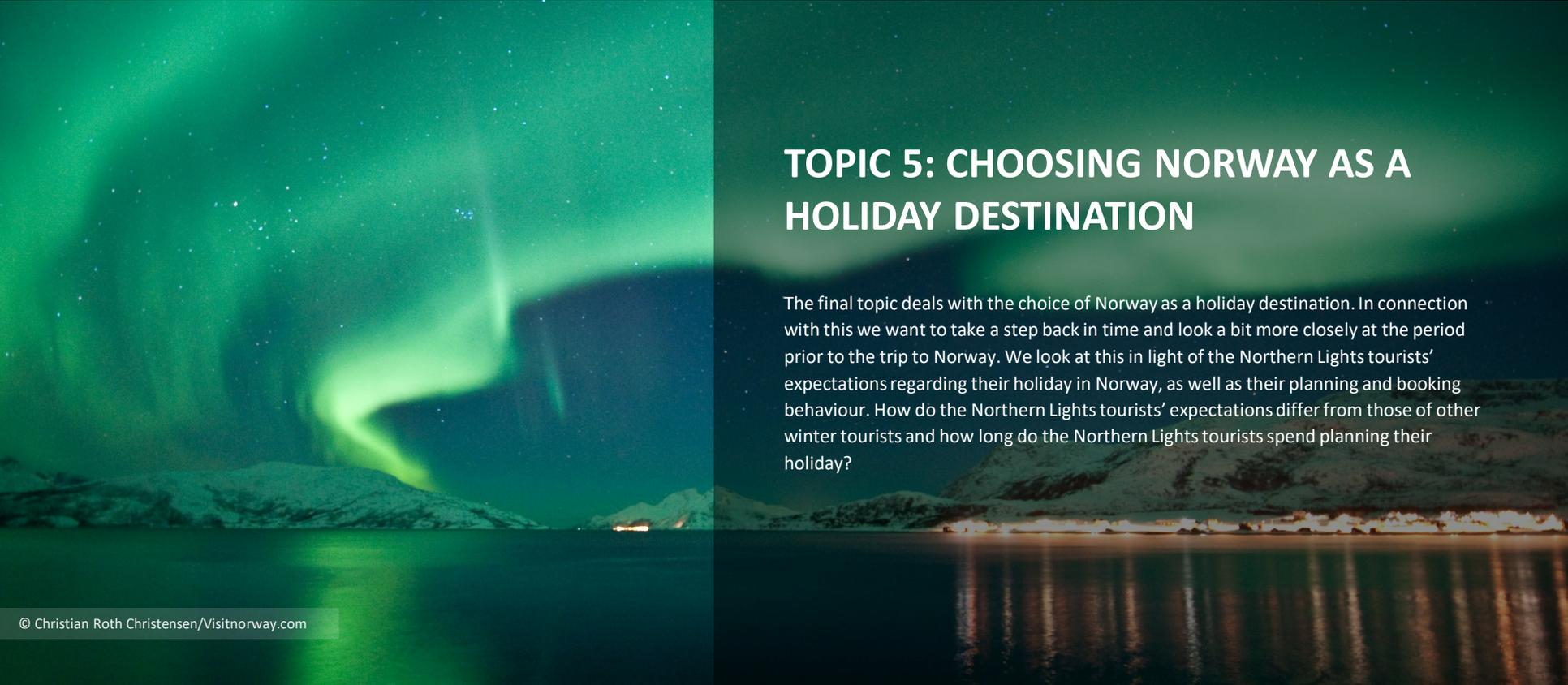
On this page we take a closer look at overtourism experienced by the Northern Lights tourists in light of where they were interviewed. It is important to point out that the question regarding overtourism does not directly relate to the location where the interview was conducted, rather it relates to the general perception of the places the tourists have visited. However, it is not inconceivable that the responses of the tourists were heavily influenced by the actual context they were in during the interview, as well as what they had experienced in the immediate period prior to the interview.

We can see no major differences in the results for experienced overtourism among the Northern Lights tourists based on interview location. On the other hand, we can see that the Northern Lights tourists interviewed at Tourist Information in Tromsø stand out a bit in that 34% state that they have experienced some extent of a form of overtourism.

Note: The figure only shows locations with at least 35 respondents.

“THE PLACES I VISITED FELT CROWDED BECAUSE THERE WERE TOO MANY TOURISTS THERE”





TOPIC 5: CHOOSING NORWAY AS A HOLIDAY DESTINATION

The final topic deals with the choice of Norway as a holiday destination. In connection with this we want to take a step back in time and look a bit more closely at the period prior to the trip to Norway. We look at this in light of the Northern Lights tourists' expectations regarding their holiday in Norway, as well as their planning and booking behaviour. How do the Northern Lights tourists' expectations differ from those of other winter tourists and how long do the Northern Lights tourists spend planning their holiday?

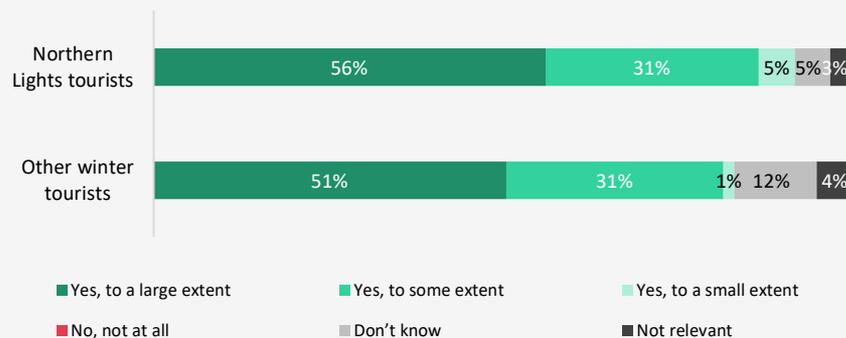
IS NORWAY PERCEIVED TO BE A SUSTAINABLE TOURIST DESTINATION?

THE NORTHERN LIGHTS TOURISTS ARE MORE LIKELY TO PERCEIVE NORWAY TO BE A SUSTAINABLE TOURIST DESTINATION THAN OTHER WINTER TOURISTS

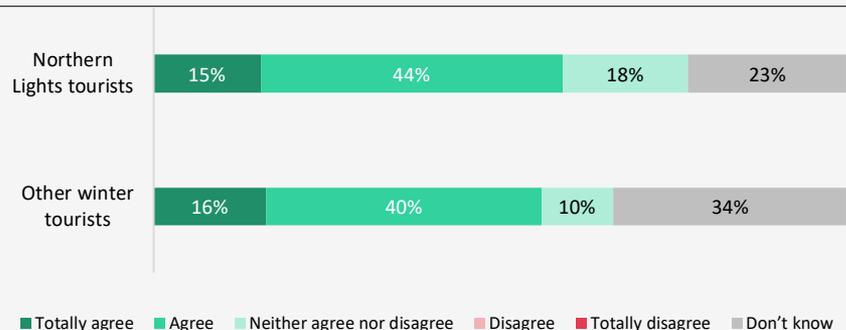
We can see that a large proportion considers Norway a sustainable tourist destination, and this is especially true among the Northern Lights tourists. For example, 56% of the Northern Lights tourists and 51% of the other winter tourists state that Norway is, to a *high degree*, a sustainable tourist destination. No winter tourists state that Norway is *not at all* a sustainable tourist destination.

The factor dealing with the extent to which a broad range of sustainable alternatives exists shows that 15% of the Northern Lights tourists totally agree with this statement and 16% of the other winter tourists. On the other hand, there is a far greater proportion of other winter tourists who totally disagree with this statement (34%) than is the case for the Northern Lights tourists (23%).

“NORWAY IS A SUSTAINABLE TOURIST DESTINATION”



“THERE IS A BROAD RANGE OF SUSTAINABLE ALTERNATIVES”



DIFFERENT EXPECTATIONS FOR THEIR HOLIDAY IN NORWAY

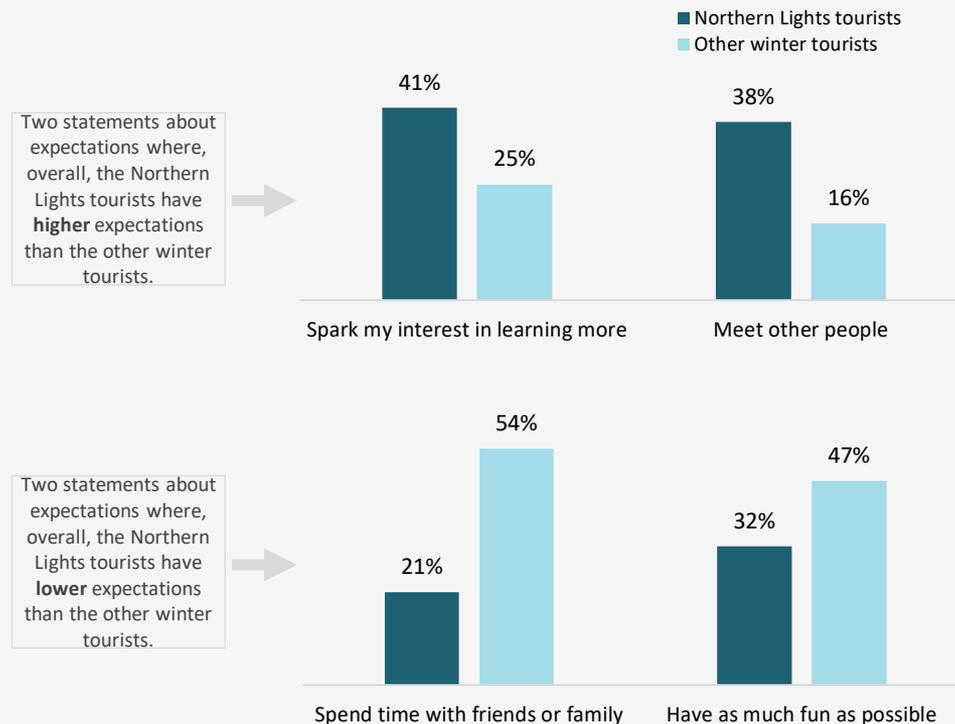
THE NORTHERN LIGHTS TOURISTS HAVE HIGHER EXPECTATIONS FOR THEIR HOLIDAY IN NORWAY WITH RESPECT TO THEIR INTEREST IN LEARNING MORE BEING SPARKED AND MEETING OTHER PEOPLE

The figure on the right shows the Northern Lights tourists' expectations for their holiday in Norway with respect to some selected parameters, compared with other winter tourists. The two top statements show expectations where the Northern Lights tourists score higher than the other winter tourists. For example, we can see that 38% of the Northern Lights tourists expect to have an opportunity to *meet other people*, while only 16% of the other winter tourists expect the same.

OTHER WINTER TOURISTS HAVE HIGHER EXPECTATIONS OF SPENDING TIME WITH FRIENDS AND FAMILY, AND HAVING FUN

The opposite is true for the bottom two statements which show that the Northern Lights tourists' expectations score lower than the other winter tourists. Here we can see that, among other things, only 21% of the Northern Lights tourists expect to *spend time with friends or family*, while more than half of the other winter tourists expect this.

"WHICH OF THE STATEMENTS BELOW DESCRIBE SOMETHING YOU THINK YOU CAN DO WHILE ON HOLIDAY IN NORWAY?"



Note: The figures are based on selected parameters from the question that reads: "Which of the statements below describe something you think you can do while on holiday in Norway?" The figure shows the proportion of tourists who agree that the statements describe something they believe you can do on holiday in Norway. Multiple answers could be selected.

A UNIQUE EXPERIENCE

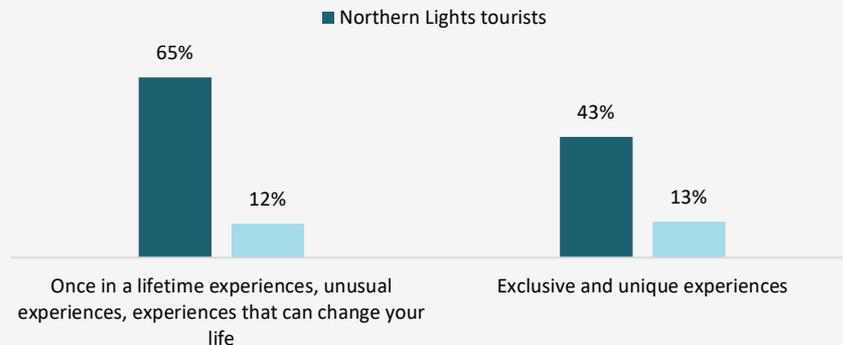
NORTHERN LIGHTS TOURISTS HAVE HIGH EXPECTATIONS FOR THEIR HOLIDAY

The figure at the top right shows that a large proportion of the Northern Lights tourists had great expectations prior to their trip to Norway. Here we can see that no less 65% of the Northern Lights tourists expected their holiday to be a *once in a lifetime experience*. In contrast, only 12% of the other winter tourists had the same expectation. Furthermore, 43% of the Northern Lights tourists state they expected exclusive and unique experiences, while the corresponding proportion for the other winter tourists was just 13%.

NORTHERN LIGHTS TOURISTS HAVE PLANNED THEIR TRIP TO NORWAY WELL IN ADVANCE COMPARED WITH OTHER WINTER TOURISTS

If we look at when the tourists first considered a trip to Norway, we can see that the Northern Lights tourists started well in advance of the other winter tourists. For example, we can see that 24% of the Northern Lights tourists considered visiting Norway more than 1 year before actually departing, while the corresponding proportion for other winter tourists is just 9%.

“WHAT EXPECTATIONS DID YOU HAVE BEFORE YOUR TRIP TO NORWAY?”



“HOW LONG IS IT SINCE YOU FIRST CONSIDERED THIS TRIP TO NORWAY?”



THE NORTHERN LIGHTS TOURISTS' INTEREST IN THE LOCAL COMMUNITY

THE NORTHERN LIGHTS TOURISTS SHOW GREAT INTEREST IN THE LOCAL COMMUNITY

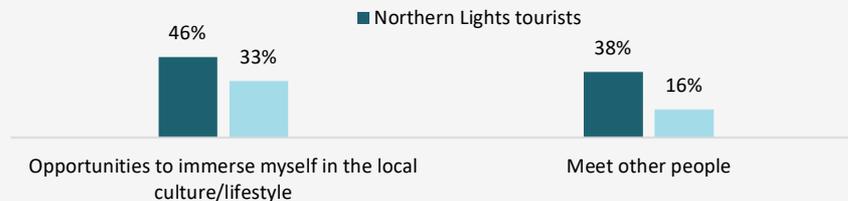
The figure at the top right shows that the Northern Lights tourists were more likely to expect they would have an opportunity to immerse themselves in the local culture/lifestyle (43%) and meet other people (38%) than the other winter tourists.

Furthermore, we can see from the Northern Lights tourists' own perception of Norway that they are generally more interested in the local community than other winter tourists. For example, we can see that no less than 51% of the Northern Lights tourists state that they perceive the local population as pleasant, while only 29% of the other winter tourists do the same. For the factor "interesting culture and history", we can also see that the Northern Lights tourists score significantly better on this than other winter tourists, with a proportion of 46% who state that they totally agree with this statement.

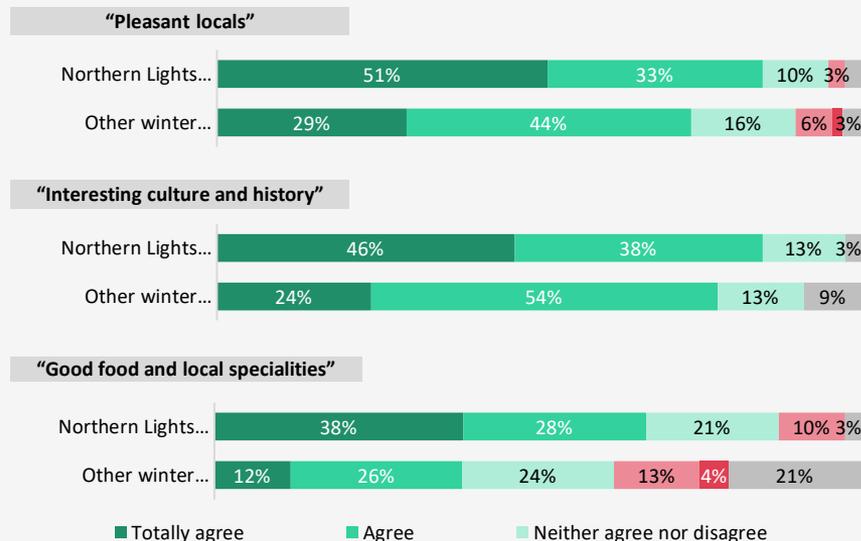
These results are also noteworthy because they indicate that the Northern Lights tourists make a positive contribution to the development of the local community, as well as the preservation of Norwegian culture and traditions.

Note: The figures are based on selected parameters of the two questions: "Which of the statements below describe something you think you can do while on holiday in Norway?" and "Below follow statements that may describe a holiday in Norway. State how well these statements match your own perception of Norway."

"WHICH OF THE STATEMENTS BELOW DESCRIBE SOMETHING YOU THINK YOU CAN DO WHILE ON HOLIDAY IN NORWAY?"



THE NORTHERN LIGHTS TOURISTS' PERCEPTIONS OF NORWAY



THE NORTHERN LIGHTS TOURISTS' BOOKING BEHAVIOUR

NORTHERN LIGHTS TOURISTS BOOK THEIR TRIP WELL IN ADVANCE COMPARED WITH OTHER WINTER TOURISTS

At the top right we can see that the Northern Lights tourists generally book the first part of their trip to Norway early. Here we can see that 16% of the Northern Lights tourists book more than 7 months before departure, while the corresponding proportion among other winter tourists is only 6%. In contrast, only 6% of the Northern Lights tourists book their trip 2 weeks before departure, while this is true for no less than 27% of other winter tourists.

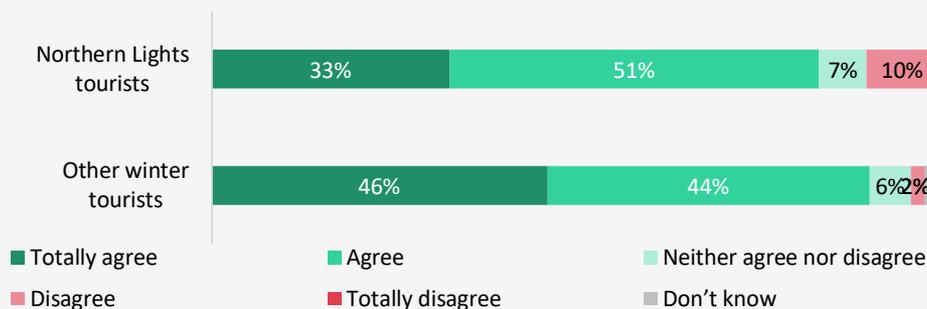
... BUT IT IS HARDER FOR THE NORTHERN LIGHTS TOURISTS TO PLAN A TRIP TO NORWAY

On the other hand, if we look at the factor related to how easy it is to plan a trip to Norway, we can see that the Northern Lights tourists are generally more negative than the other winter tourists. Here no less than 10% of the Northern Lights tourists state that planning a trip to Norway was very difficult. In other words, the Northern Lights tourists therefore have a greater need to plan their holiday well in advance!

"HOW LONG BEFORE DEPARTURE DID YOU BOOK THE FIRST PART OF YOUR TRIP TO NORWAY?"



"IT'S EASY TO PLAN A TRIP TO NORWAY"



THE NORTHERN LIGHTS TOURISTS' INFORMATION SEARCHES

NORTHERN LIGHTS TOURISTS USE OTHER INFORMATION CHANNELS MORE OFTEN THAN OTHER WINTER TOURISTS

The most widely used information channel among the Northern Lights tourists is Visitnorway.no with 38% of them stating that they use this channel. We can see that the Northern Lights tourists differ from other winter tourists in that a significantly larger proportion state that they use information channels such as travel agencies' websites, travel brochures, travel blogs, via email or phone, and Instagram.

The Northern Lights tourists' information channels can thus be grouped into two main categories: the more traditional channels (travel agencies, travel brochures, etc.) and the newer channels (such as Instagram and travel blogs).

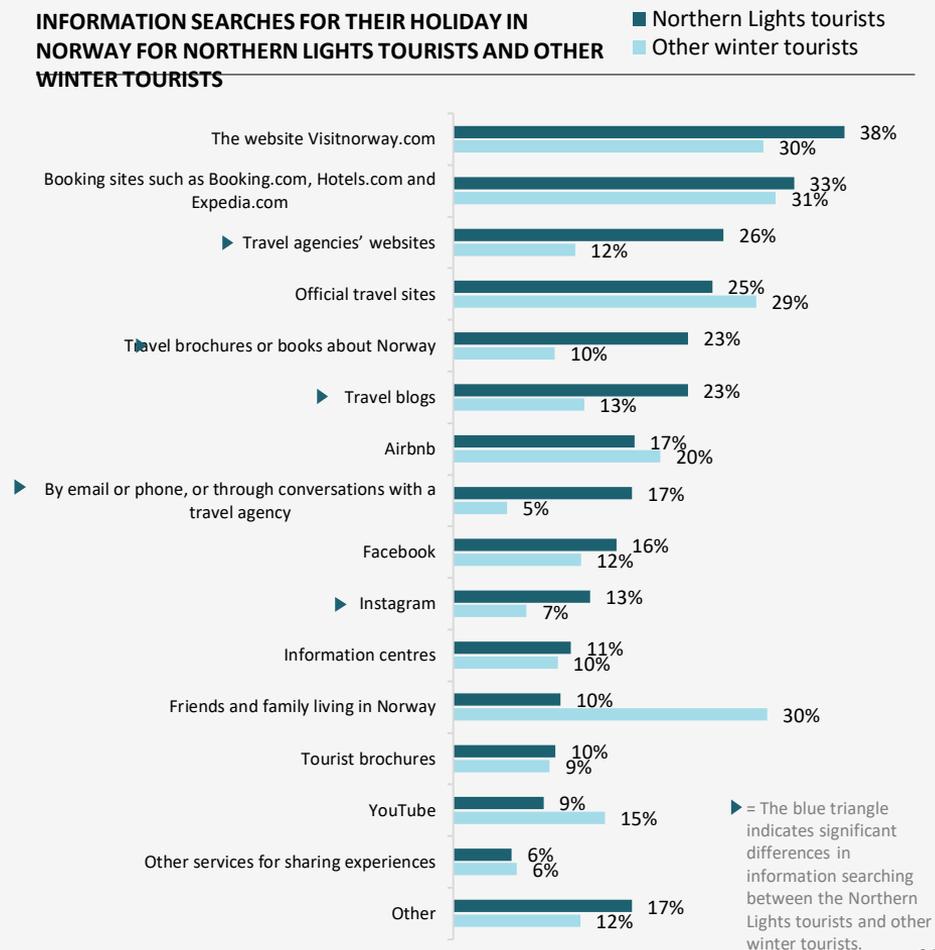
Did you know...?

It is particularly the young Northern Lights tourists who use travel blogs, Instagram, Airbnb and Visitnorway.com. On the other hand, they are less likely to use travel agencies' websites and travel brochures.



Note: The figure is based on the following question: "Which of the following options did you use to find information about what's available in Norway, or to book services or organise your trip."

INFORMATION SEARCHES FOR THEIR HOLIDAY IN NORWAY FOR NORTHERN LIGHTS TOURISTS AND OTHER WINTER TOURISTS



SOURCE DATA, METHODS AND DEFINITIONS OF TERMS

This last section describes the source data used for the analyses in the report and the methods that have been used, and also presents more detailed definitions of terms.

It is worth noting that the analyses in this report were based on two different data collection methods: both the main survey that was conducted on-site via interviews and tablets, as well as the follow-up survey that was sent via email to those who said they were willing to answer it.

DEFINITIONS OF TERMS

CONCEPT	DEFINITION
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 tourist who states that experiencing the Northern Lights is very important for their holiday in Norway and has spent at least one night in Northern Norway or on Hurtigruten.
Other winter tourist	A tourist who has visited Norway during the winter season, but who cannot be defined as a Northern Lights tourist. Therefore, this group also includes those tourists who have spent the night in places other than in Northern Norway and on Hurtigruten.
Regional areas in Norway	<ul style="list-style-type: none"> ▪ Northern Norway: Finnmark, Troms and Nordland ▪ Southern Norway: Telemark, Vest-Agder and Aust-Agder ▪ Trøndelag ▪ Western Norway: Møre og Romsdal, Sogn og Fjordane, Hordaland and Rogaland ▪ Eastern Norway: Buskerud, Oppland, Hedmark, Vestfold and Østfold ▪ The Oslo region: Oslo including Akershus
Travelling companions	Travelling companions means individuals who travel together and share their travel expenses.
Other expenditure	Other expenditure includes tourists' expenditure over and above expenditure on transport, overnight accommodation and package holidays. This could include purchasing groceries, items from newsagents, restaurants, etc., as well as course fees for holidaymakers.
Package holidays	A holiday purchased as a package trip from one provider, i.e. a package which includes at least two of the following services: transport, overnight accommodation, two or more meals per day, activities/excursions.
NPS	<u>Net Promoter Score (NPS)</u> 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 <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. NPS = % ambassadors – % critics.

SOURCE DATA AND METHODS

This report takes a closer look at tourists in Norway in the winter season 2019. The table on the right shows the number of responses from holidaymakers in Norway, grouped by Northern Lights tourists and other winter tourists.

All of the interviews were conducted by Epinion during the winter season 2019 (3 January – 22 April 2019). The interviews were based on a sampling plan that was established on the basis of the accommodation statistics administered by Statistics Norway (SSB). The tourists were interviewed at attractions, accommodation places, airports, ports, etc. in 2019. Respondents that either responded that they have been in Norway for more than 6 months, are not spending the night in Norway, or who are seasonal workers are not included in the analysis.

The overnight stays the tourists have had at hotels or campsites (registered accommodation forms) have been weighted at an accommodation level with a weighting calculated on the basis of hotel and camping overnight stays in the accommodation statistics from Statistics Norway (SSB). Overnight stays that tourists have spent in types of accommodation other than hotels and campsites (not registered accommodation forms) have been weighted based on the distribution in the source data and the overall distribution of overnight stays 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 such that each respondent is not given too high a weighting. In this way, the guests with many overnight stays are weighted heavier than guests with few overnight stays, but without individual guests being able to disproportionately affect the averages.

When we estimate an approximate number of overnight stays, this is done based on the assumption that the random sample is representative of the commercial tourism.

NUMBER OF INTERVIEWS WITH TOURISTS WHO HAVE STAYED OVERNIGHT IN NORWAY IN THE WINTER SEASON 2019

	NORTHERN LIGHTS TOURISTS	OTHER WINTER TOURISTS	TOTAL
Total on-site interviews	809	1,319	2,128
Total interviews from the follow-up web survey	117	134	251

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