

# Tourist survey

# Summer

Holidaymakers in Norway  
summer season 2024



**Epinion**



# Summer tourism in Norway

**The purpose of this report is to provide an insight into the findings from the Tourist Survey for the 2024 summer season.**

There were more overnight stays in Norway, both from Norwegians and foreigners, in the summer season of 2024 than in the summer of 2019. The accommodation statistics from Statistics Norway show a 7% growth in commercial overnight stays, while the experimental statistics published by Eurostat, which highlight overnight stays via sharing platforms like Airbnb, Booking.com, Expedia and Tripadvisor, show an even larger growth during the same period. At the same time, findings from the Tourist Survey show that there were many more overnight stays in tents and campervans outside of campsites, which are not included in any statistics.

The Tourist Survey is an interview-based 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 shows findings from the survey in 6 different topics.

If you wish to delve deeper into the results of the survey, you can take a closer look at the background report for the 2024 summer season.

## Contents

### **Topic 1: Tourism during the summer season – an overview**

Initially, we present some overall findings for foreign and Norwegian holiday tourists, as well as an overview of modes of transport to and within Norway and types of accommodation.

### **Topic 2: Expenditure and travel companions**

Which nationalities spend the most on their Norway holiday per day and in total for the entire trip? Which activities increase expenditure? How long will the tourists stay in Norway?

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

What type of outdoor experiences and activities do summer tourists engage in? What motivates them to experience nature?

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

Who are the cultural tourists, where do they come from, and what do they want to experience on their holiday in Norway?

### **Topic 5: Satisfaction and willingness to recommend**

Where do the most satisfied tourists come from? What are the critics dissatisfied with? What are the promoters satisfied with?

### **Topic 6: The importance of sustainability**

Do the environment, climate and nature influence tourists when planning their holiday? What do they do in order to travel sustainably in Norway?

### **Appendix Source data, methodology and definitions**



# Summary of findings

## More tourists with high expenditure

Tourists are spending more money, both per day and in total, compared to 2023. This is because there are more tourists with high spending habits, which raises the average expenditure.

16 per cent of foreign tourists spend more than NOK 3000 per day, are much more likely to purchase package holidays, arrive by aeroplane, and stay in hotels or on Hurtigruten/Havila cruises. More than 1 in 4 holidaymakers from the USA, the UK, and Switzerland & Austria belong to this group.

## Many are positive about visitor contributions

More than 1 in 3 holidaymakers from Germany, the UK, the USA, France, and Switzerland & Austria are willing to pay extra to ensure nature and the environment are better safeguarded. In addition, 1 in 3 campervan tourists are also willing to pay more.

Norwegians and Danes are less positive about paying extra. Only 1 in 5 Norwegians and only 16 per cent of Danes are positive.

## Happy to recommend Norway

The vast majority are very satisfied with their holiday in Norway and are happy to recommend Norway as a destination to others.

Both Norwegians and foreigners feel to a much greater extent that prices are consistent with quality on their holiday. More than 50 per cent are satisfied with the accommodation, service and hospitality of the locals.

There is potential for development in providing guests with greater opportunities to experience local culture and lifestyle, better access to local products, and offering Norwegians a more attractive range of activities.

## Nature + Culture = A perfect match

Nearly 7 out of 10 foreign tourists want to experience both nature and culture during their holiday in Norway. This is especially the case for tourists under the age of 50, those on a round trip and tourists from the US, UK, France, Switzerland & Austria.

As much as 84 per cent want to experience nature and/or outdoor activities. The main motivations for foreign tourists are experiencing spectacular nature, peace and quiet, being physically active, enjoying quality time together, and getting to know the places they visit.

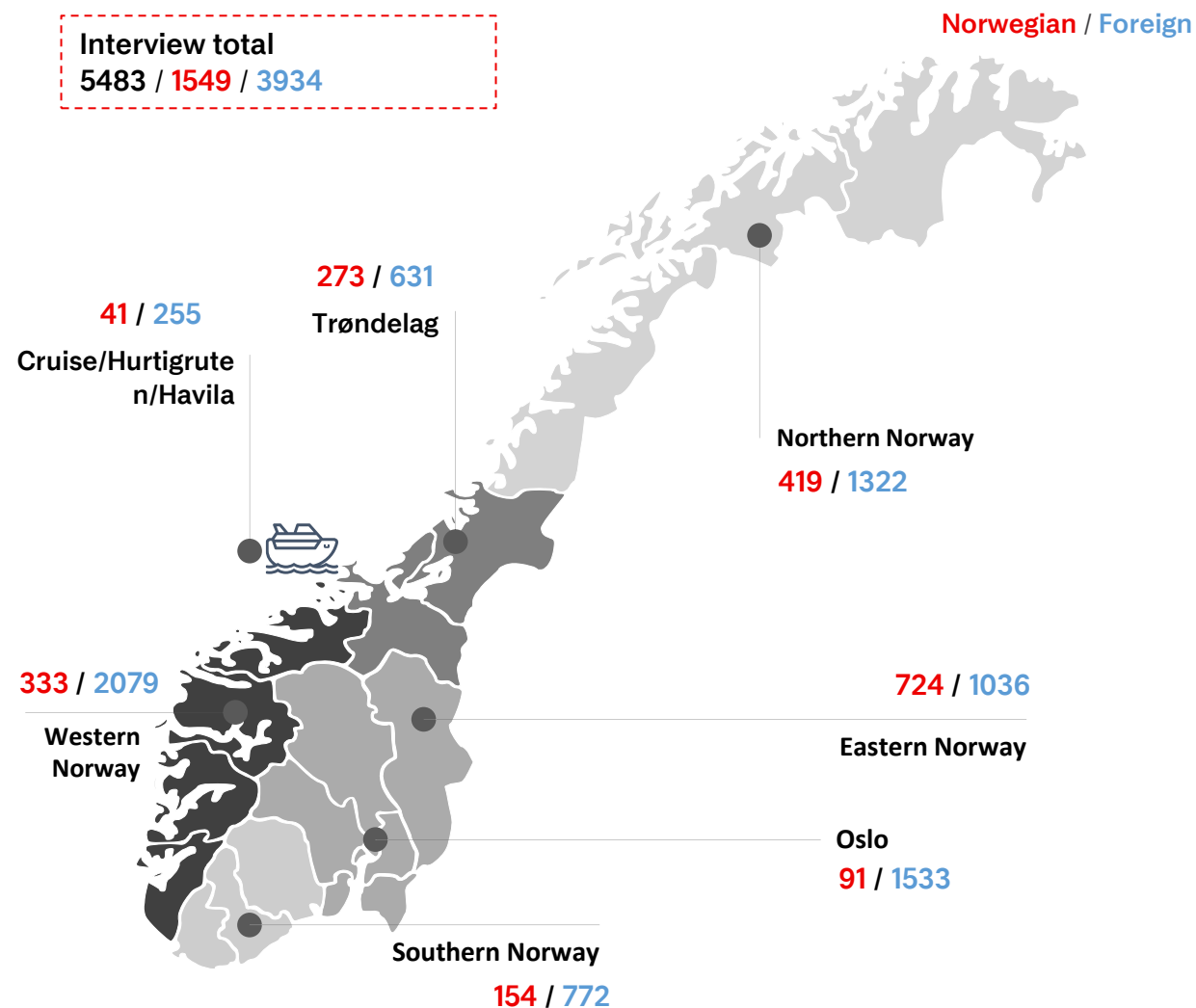


# The Tourist Survey is a nationwide survey conducted among Norwegian and foreign tourists travelling in Norway

Interviews are conducted throughout the year. In the summer of 2024 (May-August), **5483** interviews were conducted, and the interviews are divided into six regions. The map on the right shows overnight stays in each region, and overnight stays on Hurtigruta/Havila.

The data collection was carried out according to a sampling plan aimed at conducting a sufficient number of interviews with tourists in these regions, from selected international markets, staying at various types of accommodation and travelling by different modes of transport, etc.

The distribution of interviews with overnight stays in the various regions.



NB: Tourists can stay overnight in multiple regions. Therefore, the numbers add up to more than the total number of interviews.

# Significantly more tourists than before the pandemic

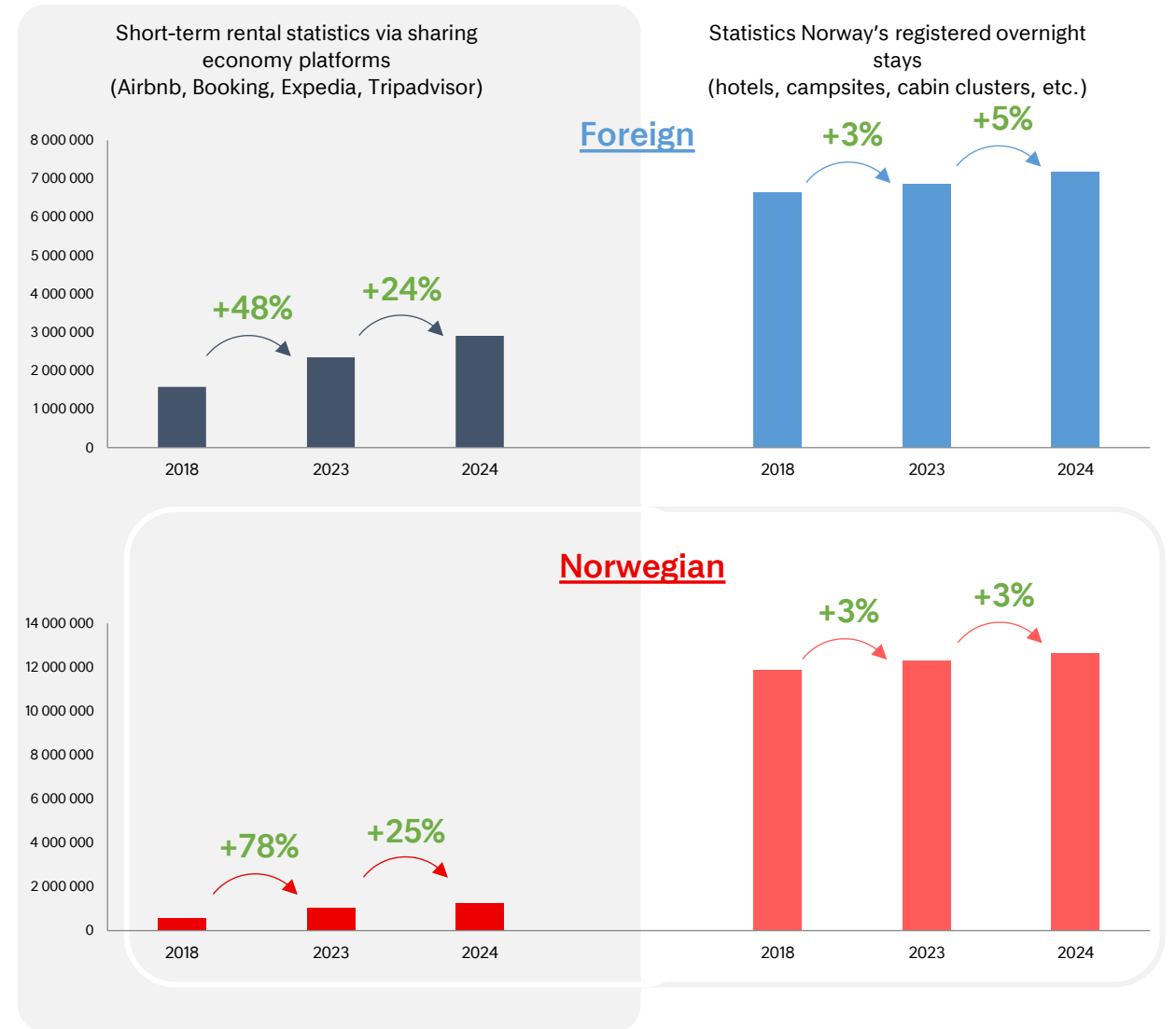
In this report, we take a look at the tourists who visited Norway during the May to August period in 2024.

Statistics Norway publishes 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. There is a risk that some of the guest nights are reported in both the statistics from Statistics Norway and in the statistics from Eurostat.

At the same time, we know that there are a number of guest nights that are not reported in any statistics, either because they are cabins listed on Finn.no, guest nights on Hurtigruten, Havila, or Norwegian Trekking Association cabins, which are not included in the accommodation statistics. In addition, there are many guest nights in tents and campervans outside campsites that are also not reported in any statistics.

Growth is significantly stronger for guest nights reported via the major international actors than guest nights reported to Statistics Norway in the ordinary manner. However, most is included in Statistics Norway's statistics. During the summer season 2024, 10,512,160 foreign guest nights were reported to Statistics Norway and 2,909,600 guest nights from AirBnB, Booking.com, Expedia and Tripadvisor to Eurostat.

## Distribution of overnight stays in Norway during the summer seasons 2019, 2023 and 2024



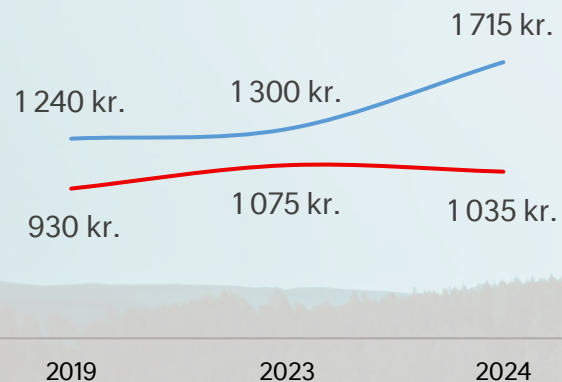
Source: Statistics Norway's accommodation statistics and cabin rental statistics.

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.

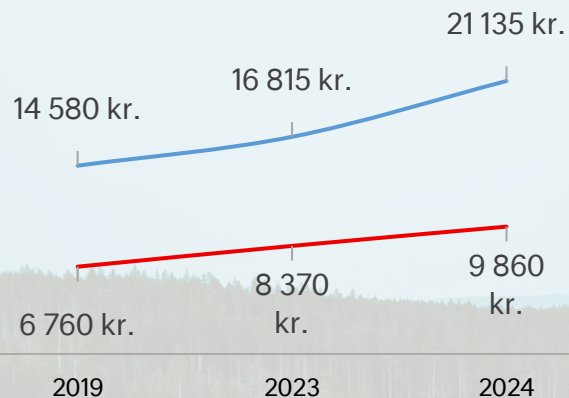
## Daily expenditure

Foreign tourists Norwegian tourists



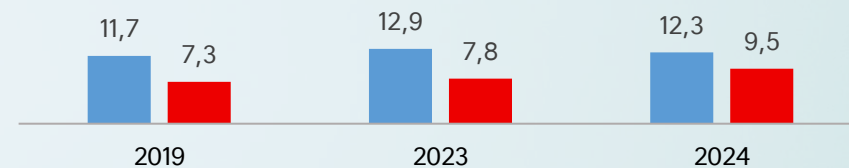
## Total expenditure

Foreign tourists Norwegian tourists



## Commercial overnight stays

Foreign tourists Norwegian tourists



Number in millions, source SSB

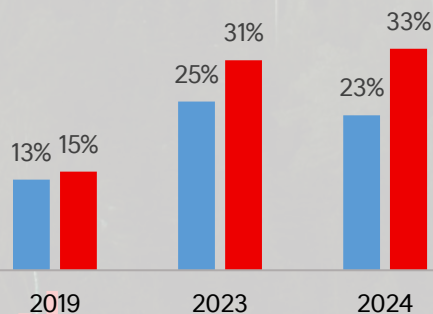
## NPS

Foreign tourists Norwegian tourists



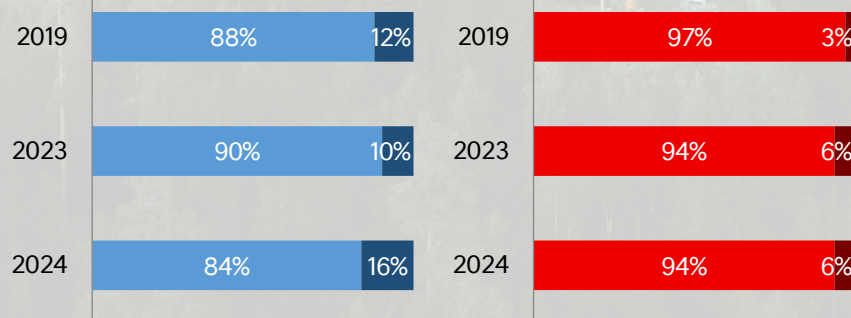
## Price in relation to quality

Foreign tourists Norwegian tourists



## Proportion of high / low expenditure<sup>1</sup>

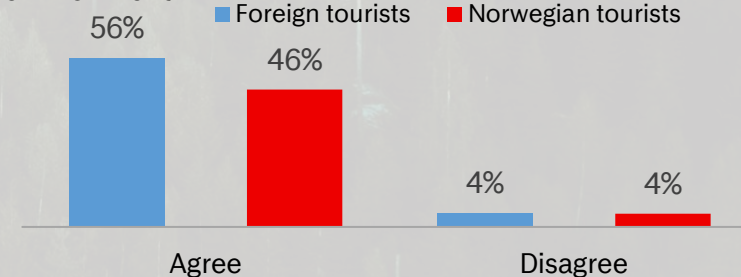
Low consumption High consumption Low consumption High consumption



<sup>1</sup>Low expenditure refers to a daily expenditure of less than NOK 3000, while high expenditure refers to a daily expenditure of NOK 3000 or more.

## It was easy to find destinations, means of transport and experiences that do a little extra for nature and the environment

Foreign tourists Norwegian tourists







# Topic 1:

## **Tourism during the summer season – an overview**

Initially, we present some overall findings for foreign and Norwegian holiday tourists, as well as an overview of modes of transport to and within Norway, and different types of accommodation.

# Characteristics of foreign summer tourists

The majority of foreign tourists are on a round trip, and they want to experience a wide range of nature and cultural experiences during their holiday.

Nearly half are visiting Norway for the first time. This is especially the case for tourists from Southern Europe and overseas markets. In the nearby markets, there are many loyal Norway fans. Approximately 1 in 3 tourists from Sweden and Denmark visit Norway at least once a year.

The vast majority use cars for their journeys in Norway, and more and more people travel by campervan. The tourists based in Northern Norway and in Southern Norway are most willing to recommend Norway.

Tourists in Southern Norway are most satisfied with the food at restaurants, the service, the accommodation, and the friendly local population. Those who visit Oslo are more satisfied with the opportunities to experience local culture and lifestyle, museums, and feel that it is easier to find out what to do and experience.



More than 2 out of 3 want to **experience both culture and nature**



1 in 5 travel around Norway in campervans



1 in 4 participate in **organised outdoor activities or activities with a guide**

## Foreign summer tourists

Nearly half are **visiting Norway for the first time**



More than half are on a **round trip**, and nearly half visit **3 or more regions**





# Characteristics of Norwegian summer tourists

For Norwegians on holiday in Norway, summer holiday means hiking, nature experiences, and the beach, sun and swimming.

Nearly 4 out of 10 overnight stays are at the homes of friends and acquaintances or in their own cabin.

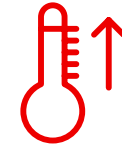
Approximately 40 per cent are interested in culinary experiences, history, cultural heritage, attractions, and sights. 1 in 5 want to experience local food culture, and 16 per cent want to visit a specific restaurant.

17% go to a concert, the theatre or a performance while on holiday.

Quality time together with others and being physically active are the main motivation factors for Norwegians on holiday in Norway.



More than 1 in 3 travel with children under 18



Nearly 1 in 10 will avoid heatwaves and extreme heat



1 in 3 spend at least one night with family, friends, or acquaintances.



1 in 2 will seek out the beach, sun and swimming activities



More than 1 in 10 go to a concert during their holiday



They are focused on experiencing quality time with others and being physically active.

Norwegian summer tourists



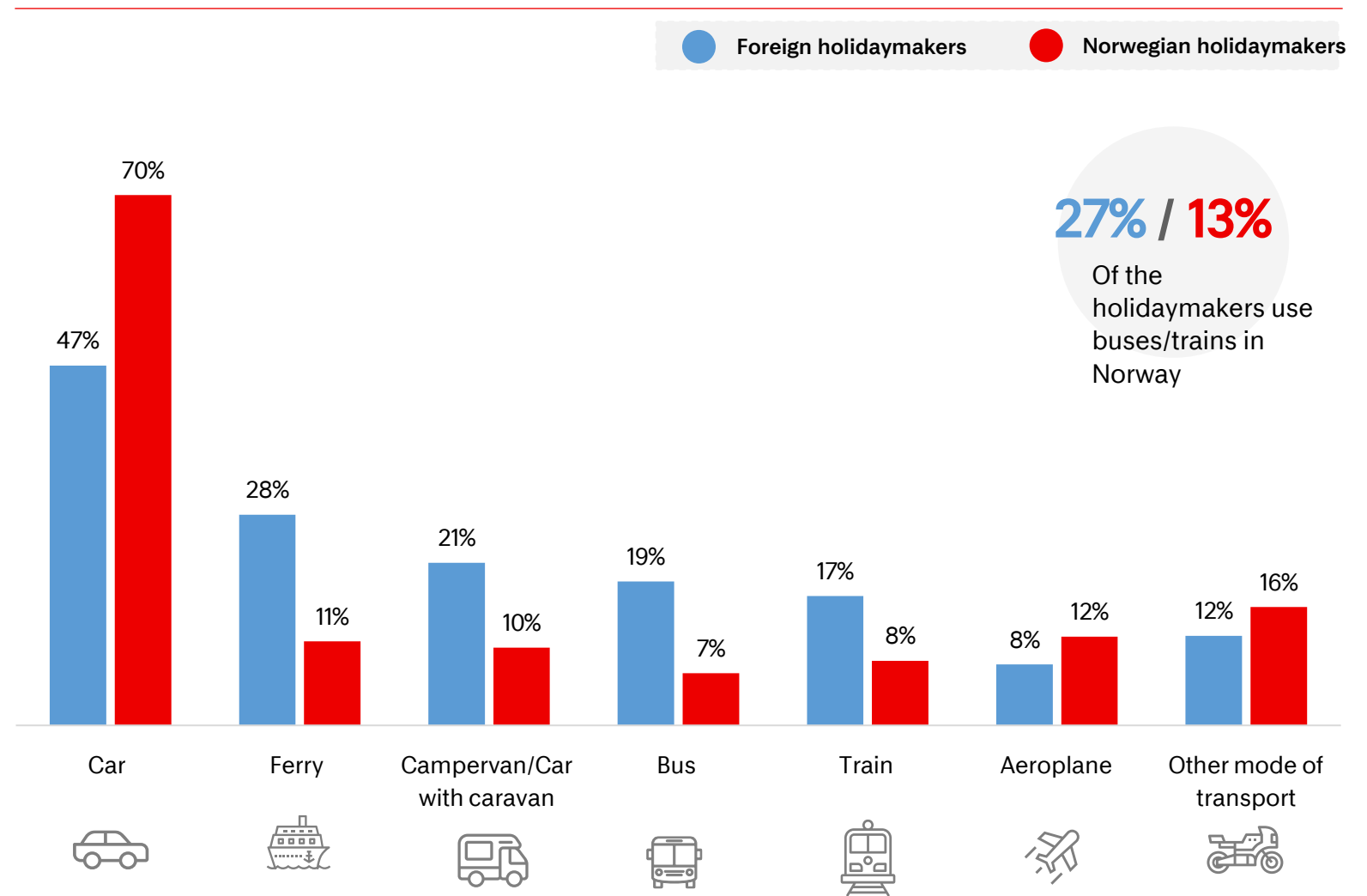
## Topic 1: Summer season – an overview

# More than half use a car when travelling in Norway

The proportion of people travelling by aeroplane on their holiday in Norway has decreased significantly from 2019, as has the proportion travelling by bus and train.

It is more common to use trains and buses after arriving in Norway by aeroplane than other types of transportation. When the proportion of visitors arriving by aeroplane decreases, the proportion using buses and trains also decreases.

Modes of transport used by holidaymakers when travelling in Norway



NB: It is possible to choose multiple modes of transport if more than one means of transport has been used while travelling in Norway. Therefore, the numbers add up to more than 100%. 'Car' includes petrol/diesel car, hybrid car and electric car. 'Cruise' includes Hurtigruten, Havila and other ferry/cruise companies. 'Other' includes taxi, bike, leisure boat, motorcycle, tram/rail and others.



Topic 1: Summer season - an overview

## More in campervans and fewer by aeroplane than before the pandemic

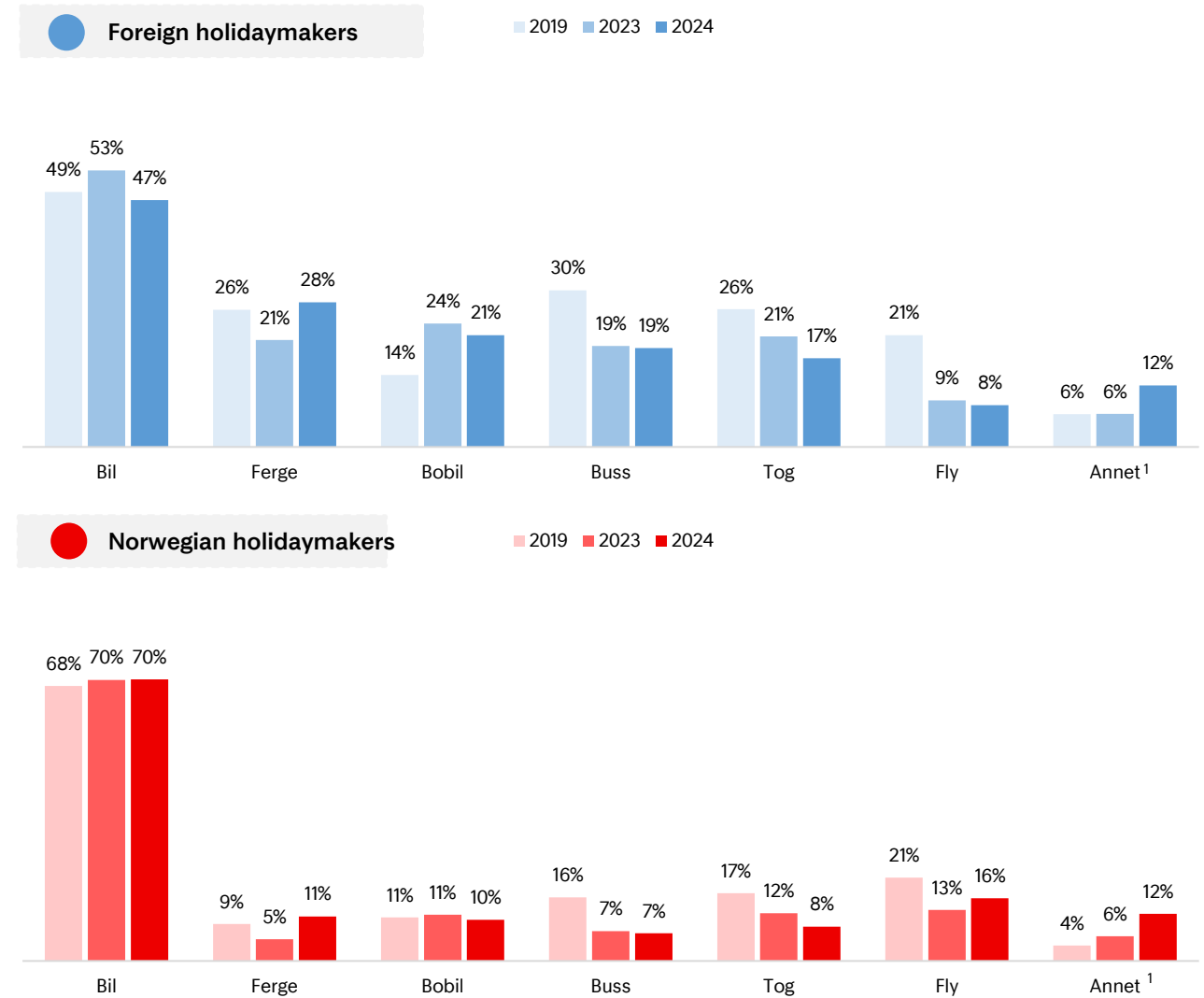
A larger proportion of tourists now use campervans during their holidays in Norway compared to before the pandemic. 2 out of 10 tourists use a campervan as their mode of transport for their holiday in Norway. They come primarily from Germany, the Netherlands, Switzerland, Austria and France.

The proportion of travellers flying domestically during their holiday in Norway has been halved since 2019, and the same applies to the proportion travelling by bus and train.

It is common to combine flying to Norway with travelling by train and bus within the country. When the proportion of travellers arriving by aeroplane decreases, the proportion travelling by bus and train within Norway also decreases.

### Modes of transport used by holidaymakers when travelling in Norway over time

The proportion of holidaymakers who have specified their mode of transport



<sup>1</sup> The Other category includes the following categories of transport: 2019 - Motorcycle, Other, Has not used any means of transport; 2023 - Motorcycle, Other; 2024 - Taxi, Bike, Leisure Boat, Motorcycle, Tram/Rail, Other

## Topic 1: Summer season - an overview

# Car or campervan is the most common mode of transport within Norway, regardless of the mode of transport to Norway

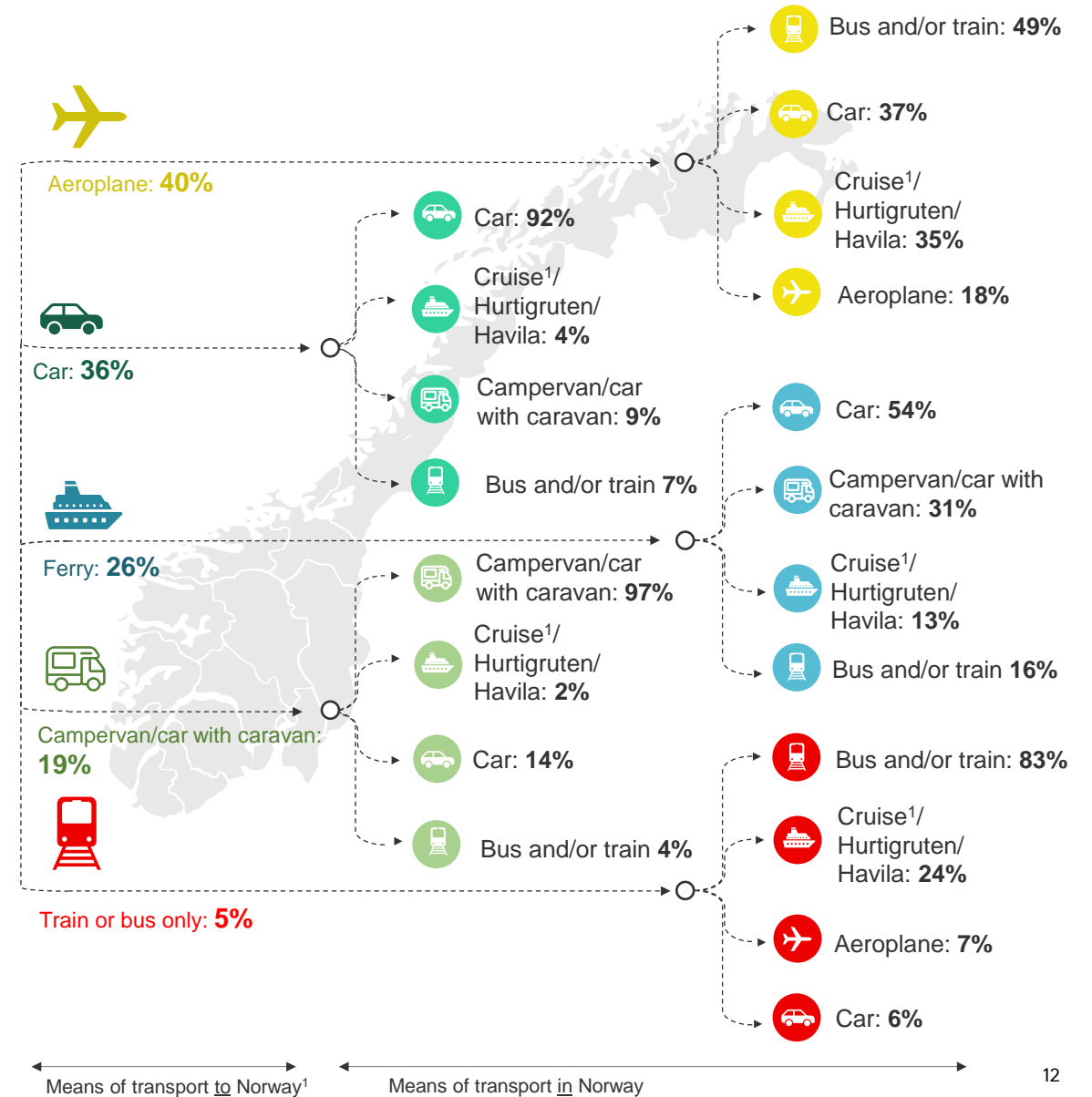
The mode of transport to Norway is a good indicator of the types of transportation tourists use within Norway, especially for those arriving by car/campervan, but also for those arriving by bus and train.

A large majority of tourists from overseas markets, as well as those from Southern Europe, arrive by aeroplane to Norway.

Approximately 4 out of 10 tourists from the Netherlands, Germany, Denmark and Belgium arrive by ferry, most of them in combination with a car or campervan.

A very small percentage arrive only by train and bus. Significantly more people use trains and buses in combination with flights; they are not included in the group that uses only trains and buses.

## Combination of means of transport to and within Norway for foreign holidaymakers





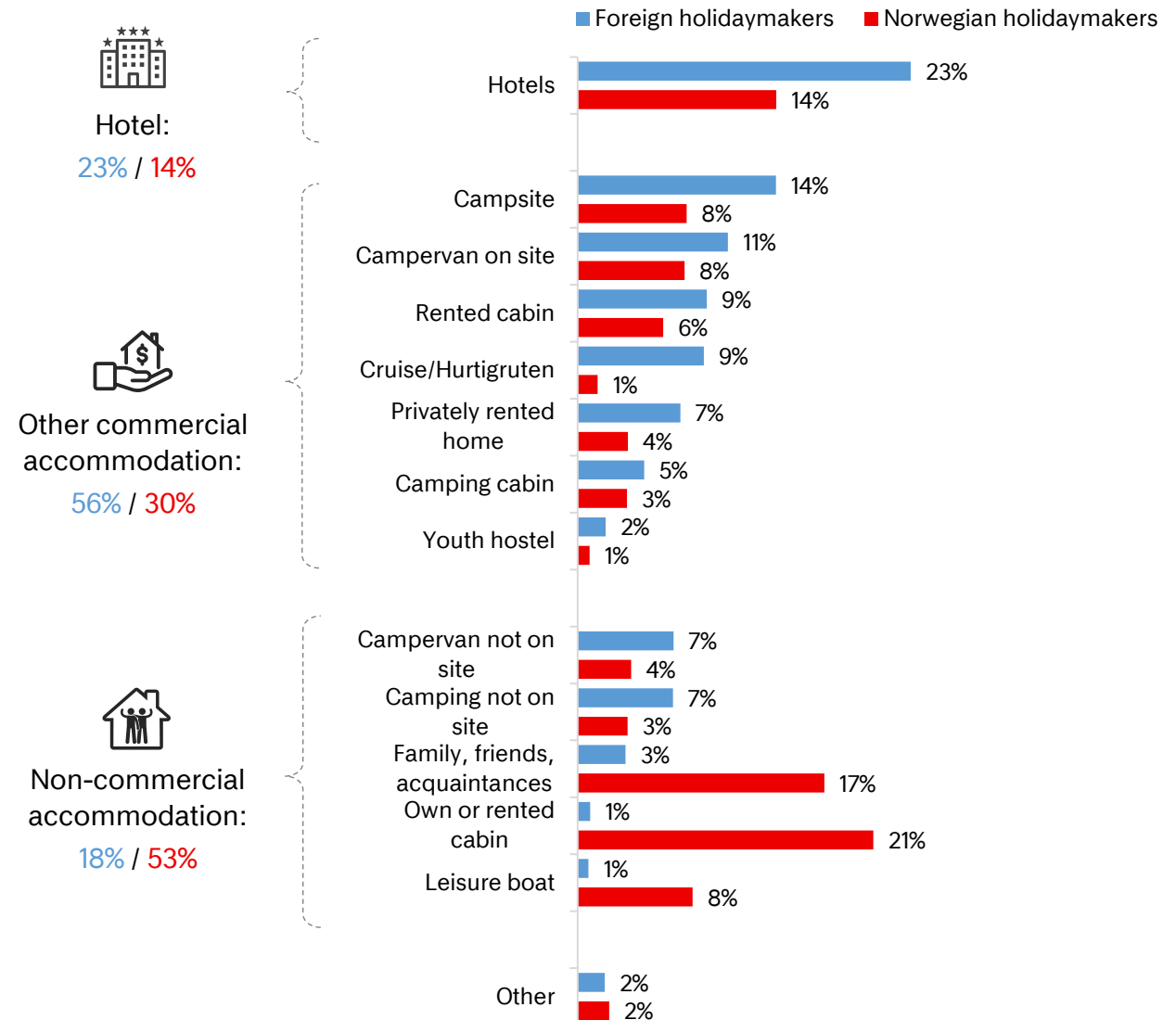
## Topic 1: Summer season - an overview

# What types of accommodation do foreign and Norwegian tourists use?

Tourists who spend more than half of their overnight stays in hotels spend significantly more money per day on their trip. They are more likely to visit Oslo and Northern Norway, and less likely to visit Southern Norway and Western Norway. They are more interested in culinary, art and cultural experiences. If they combine hotels with other types of accommodation, it is primarily Hurtigruten/Havila. They spend more money on all types of services, activities and experiences, including outdoor activities.

Campervan tourists are the opposite. They spend almost NOK 1000 less per day than an average tourist from abroad. They spend one out of three nights in a campervan or tent outside of campsites. They enjoy outdoor activities that are free of charge, and the largest expense is transportation costs within Norway.

## Distribution of holidaymakers' overnight stays according to accommodation type



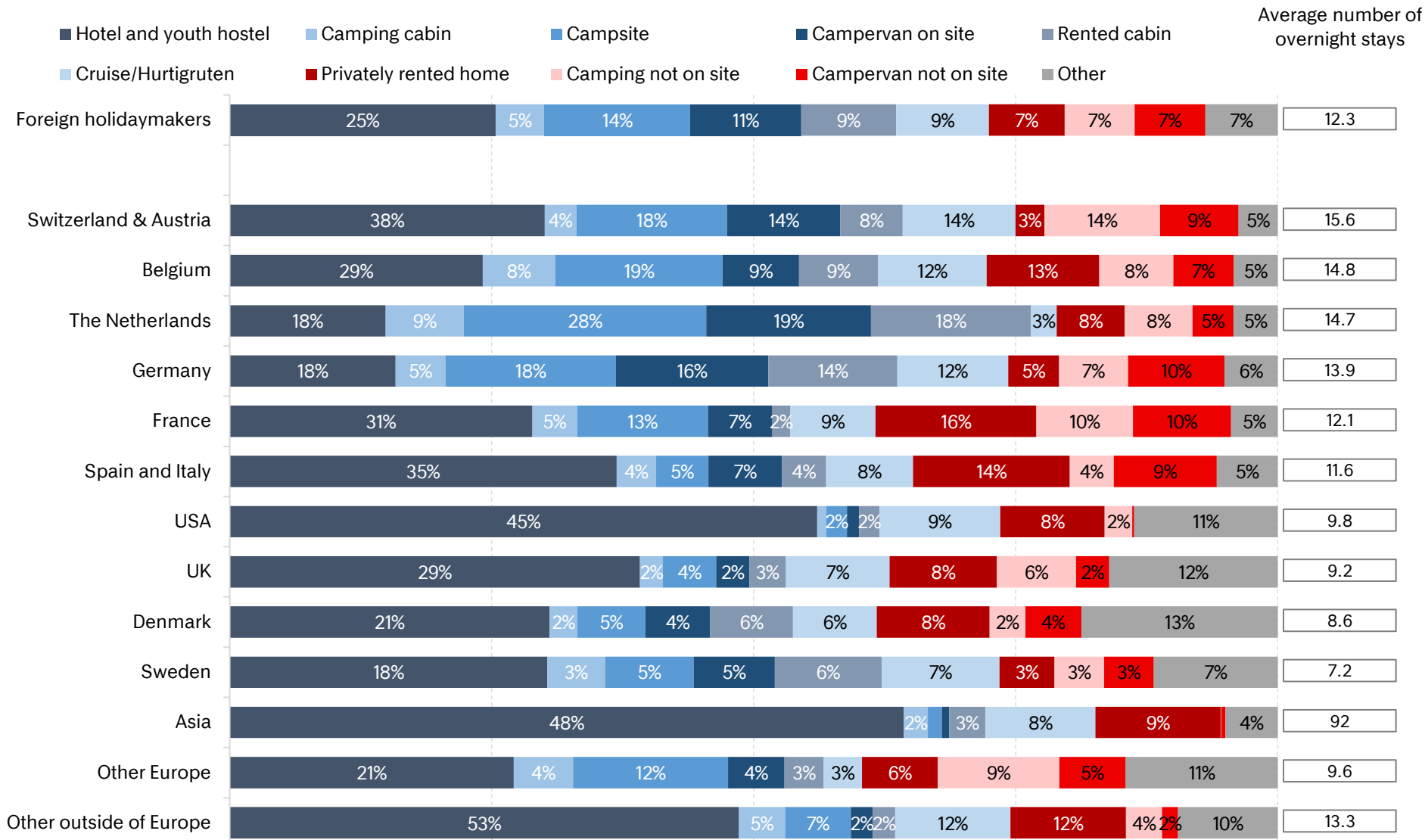
## Fewer overnight stays in hotels

The proportion staying at hotels has decreased after the pandemic.

Tourists from Southern Europe are more likely to rent private homes (France 16%, Italy and Spain 14%).

More visitors choose camping and campervans, both on and off campsites. This applies in particular to Germany, the Netherlands, Belgium and Switzerland & Austria.

Tourists from overseas markets are much more likely to stay in hotels.





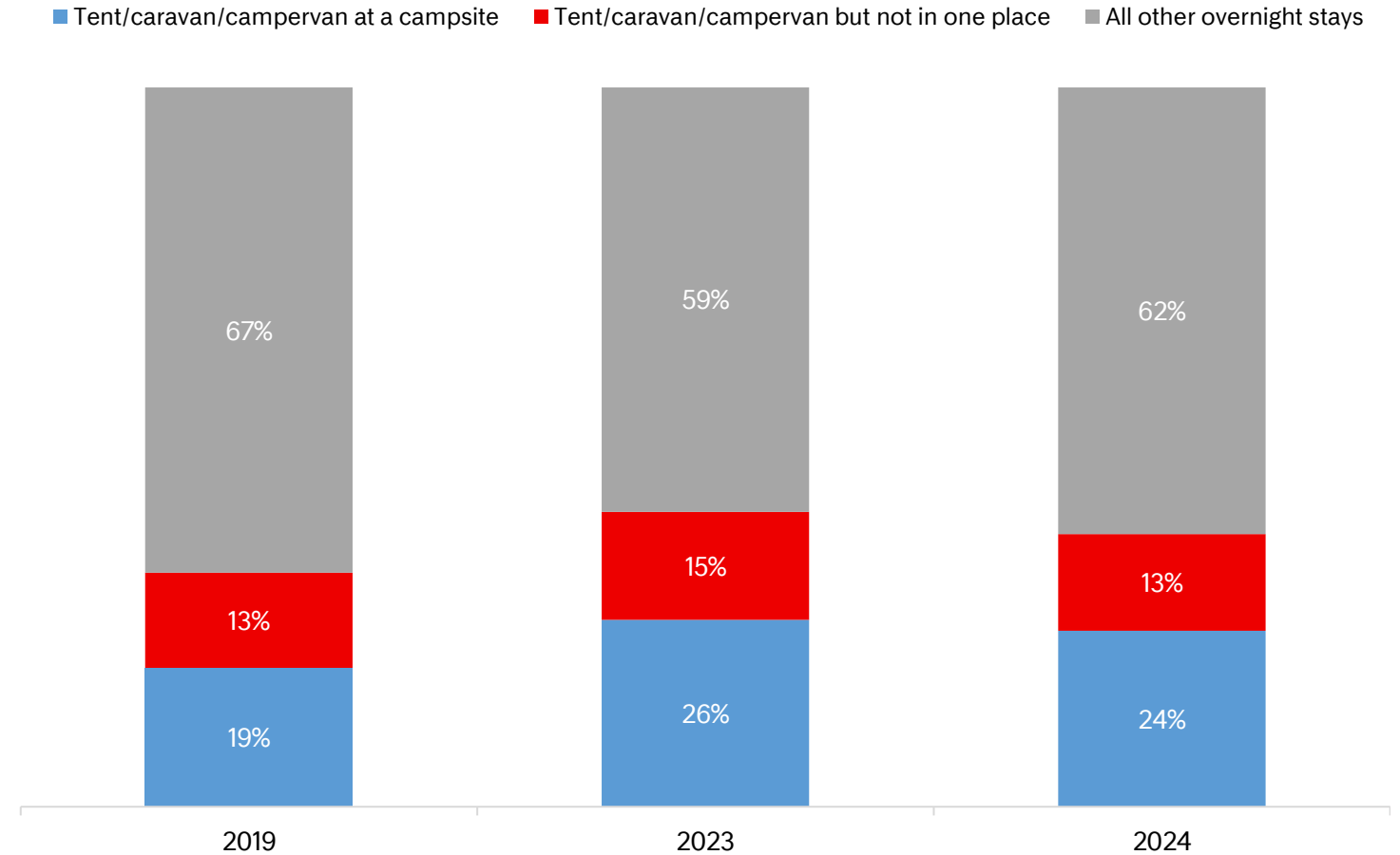
## Topic 1: Summer season - an overview

# Major growth for foreign overnight camping stays

As the introductory slides show, the number of overnight stays during the summer season has increased in recent years, and the particularly interesting thing is that the proportion of people staying in tents or campervans at campsites has increased more than other types of accommodation. The same applies to overnight stays outside of campsites.

## The distribution of foreign holidaymakers' overnight stays at accommodation types over time

The proportion of holidaymakers who have specified the type of accommodation



## Topic 1: Summer season - an overview

# Those who only use buses and trains to Norway


Visitors arriving by bus and/or train to Norway are significantly younger than the average, 1 in 4 being under the age of 30. They are more likely to travel by bus and train within Norway as well.

This group consists of two very different groups – those travelling in an organised group, and those travelling individually by bus and train.

They have taken sustainability into much greater consideration when planning their trip (60%), and 1 in 3 have chosen to avoid destinations due to climate and environmental considerations (33%).

They are more likely to stay in hotels and hostels, and have visited Oslo to a much greater extent. They are more likely to travel alone (11%).



 Tourists arriving by bus and train to Norway

 All foreign holidaymakers

Tourists arriving by bus and train to Norway are foreign holidaymakers who have only travelled to Norway by either train or bus.



**4.8 / 2.9**  
Average number of travelling companions<sup>1</sup>



**12% / 25%**  
Travelling with children under 18 years of age



**44% / 42%**  
Are women



**45.8 years of age**  
/ **49.5 years of age**  
Average age



**NOK 2545 / NOK 1715**  
Average daily expenditure<sup>2</sup> while on holiday in Norway



**72% / 42%**  
Choose climate-friendly modes of transport in order to safeguard nature, the environment and the climate



**10 / 12.3**  
Average number of overnight stays in Norway

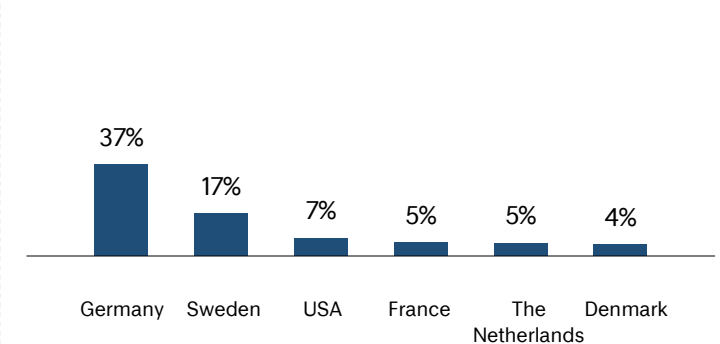


**83% / 27%**  
Use trains and/or buses when travelling in Norway



**17% / 2%**  
Travelling as part of an organised trip

Top 6 holiday markets



<sup>1</sup>Travel companions refer to the total number of people travelling together on this holiday.

<sup>2</sup>The average expenditure has been rounded to the closest NOK 5.



## Topic 1: Summer season - an overview

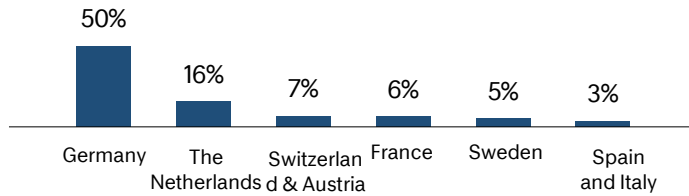
# Foreign campervan tourists

 Campervan tourists

 All foreign holidaymakers

Campervan tourists are foreign holidaymakers who have either travelled **to** or **around** Norway in campervans, or have stayed overnight in campervans on or off a campsite.

Top six holiday markets for campervan tourists



Half of the campervan tourists are from Germany and are primarily in the 50+ age group. They spend much less money per day and on the holiday overall, despite the fact that they stay in Norway for a longer period of time. On average, they camp 5.6 nights in tents or campervans outside campsites. It accounts for 32 per cent of the overnight stays in Norway.

Campervan tourists go hiking (85%), cycle (26%), and fish (22%) to a greater extent than others.

The main motivating factors are experiencing peace and quiet (76%), and experiencing spectacular nature (68%). They are very satisfied with their holiday and are likely to recommend Norway as a travel destination.



23%

Of the foreign travellers are campervan tourists



2.7 / 2.9

Average number of travelling companions<sup>1</sup>



28% / 25%

Travelling with children under 18 years of age



36% / 42%

Are women



52.7 years of age /

49.5 years of age  
Average age



NOK 740 / NOK 1715

Average daily expenditure<sup>2</sup> while on holiday in Norway



35% / 33%

Will pay extra to ensure that nature and the environment are better taken care of



17.4 / 12.3

Average number of overnight stays in Norway



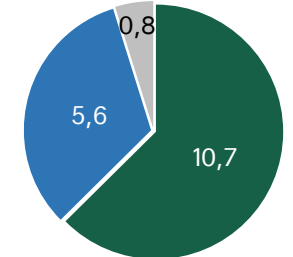
27% / 35%

Investigate sustainability when planning their trip



73 / 70  
NPS

Number of overnight stays according to accommodation types



■ Tent/caravan/campervan at a campsite  
■ Tent/caravan/campervan outside a campsite  
■ Other accommodation types



<sup>1</sup>Travel companions refer to the total number of people travelling together on this holiday.

<sup>2</sup>The average expenditure has been rounded to the closest NOK 5.

## Topic 1: Summer season - an overview

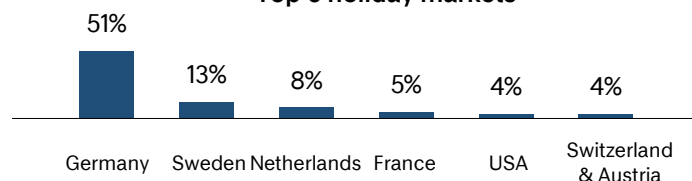
# Fishing tourists

Fishing tourists

All foreign holidaymakers

Fishing tourists are foreign tourists who have engaged in fishing activities on their trip in Norway.

Top 6 holiday markets



The fishing tourists are predominantly men, and they are in Norway to pursue their interests and harvest nature's resources.

At the same time, nearly half of them travel with children, particularly those aged 13-17. One in four travel with friends, so spending quality time with others is also important for fishing tourists.

Germany is by far the largest market, but tourists from many parts of Europe come to Norway to fish. More than 7 out of 10 overnight stays are in tents (24%), cabins/private rentals (29%), or campervans (20%). They are more likely to visit Southern Norway and Western Norway.

In addition to fishing, they want to experience the outdoors, go hiking, sunbathe and swim, and take boat trips. 3 out of 4 who fish also want to experience culture.



**3.4 / 2.9**  
Average number of travelling companions<sup>1</sup>



**45% / 25%**  
Travelling with children under 18 years of age



**34% / 42%**  
Are women



**48.5 years of age**  
/ **49.5 years of age**  
Average age



**NOK 1095 / NOK 1715**  
Average daily expenditure<sup>2</sup> while on holiday in Norway



**16%**  
Of the foreign travellers are fishing tourists



**13.8 / 12.3**  
Average number of overnight stays in Norway

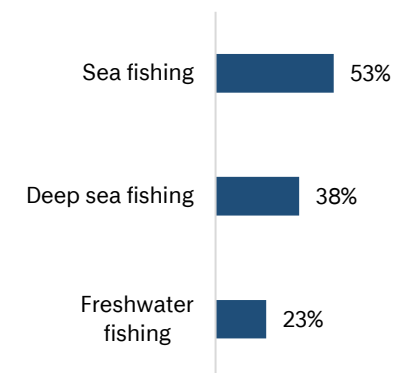


**48% / 18%**  
Want to harvest food resources from nature



**28% / 20%**  
Want to pursue their interests during their holiday in Norway.

Which fishing activities are most popular?



<sup>1</sup>Travel companions refer to the total number of people travelling together on this holiday.

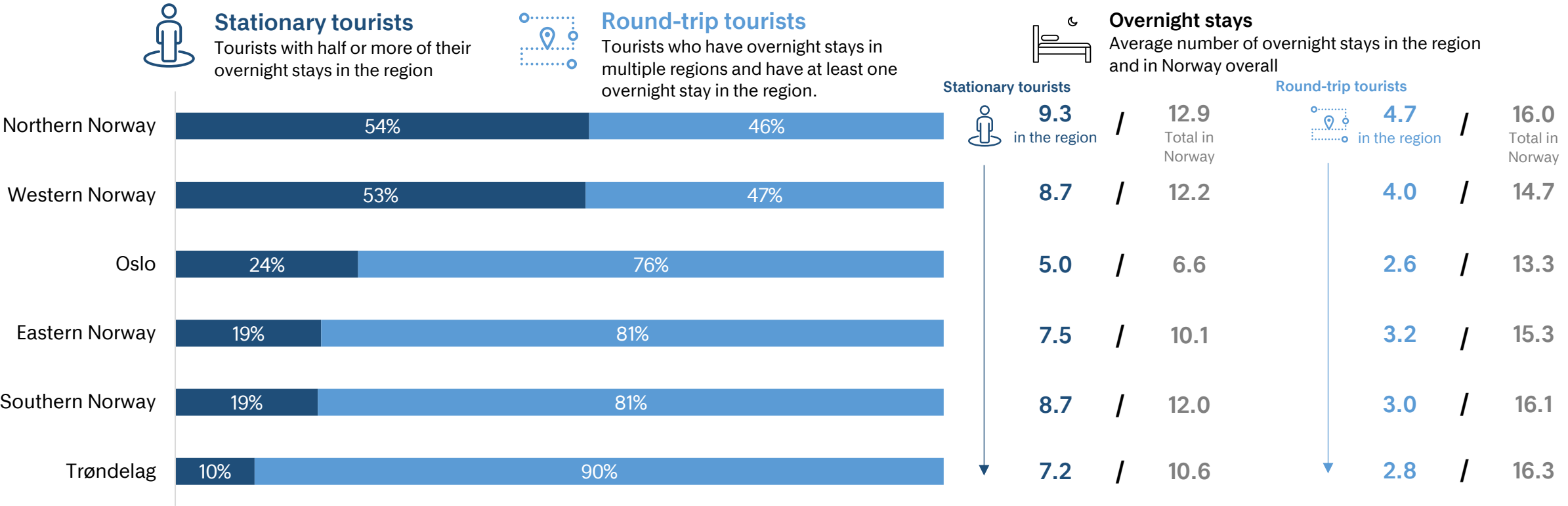
<sup>2</sup>The average expenditure has been rounded to the closest NOK 5.

Topic 1: Summer season - an overview

6 out of 10 on a round trip during the summer

6 out of 10 foreign travellers are on a round trip in Norway. They have overnight stays in several regions and do not have half or more of their overnight stays in any single region. Northern Norway (54%) and Western Norway (53%) have the largest proportion of tourists who spend more than half of their stay in Norway in the region. In Northern Norway, stationary tourists have 9.3 overnight stays in Northern Norway out of their total 12.9 overnight stays in Norway during their trip. Round-trip tourists have 4.7 overnight stays out of their total of 16 overnight stays in Northern Norway. Southern Norway and Trøndelag have the largest proportion of round-trip tourists. Many tourists visit the region as part of a larger round trip, also travelling to Northern Norway and/or Western Norway during their journey.

Foreign stationary and round-trip tourists across regions



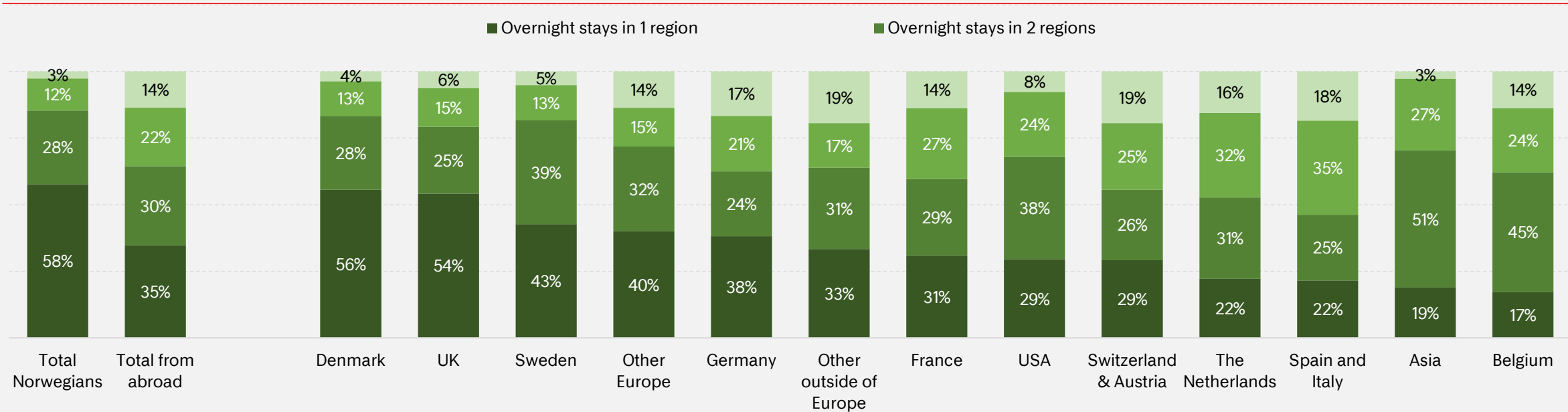


Topic 1: Summer season - an overview

# The majority have overnight stays in two or more regions on their holiday

The majority from all markets, with the exception of Denmark and the UK, visit more than one region on their journey in Norway. Tourists from Spain & Italy, the Netherlands, Austria & Switzerland and France engage in round trips the most, and more than 40 per cent from these countries have overnight stays in 3 or more regions on their journey.

The number of different regions holidaymakers have overnight stays in during their trip to Norway (Western Norway, Eastern Norway, Northern Norway, Oslo, Southern Norway, Trøndelag)  
Number of regions per market



NB: 39 holidaymakers have only had overnight stays on Havila/Hurtigruten or another cruise line. These are not included in the calculations.

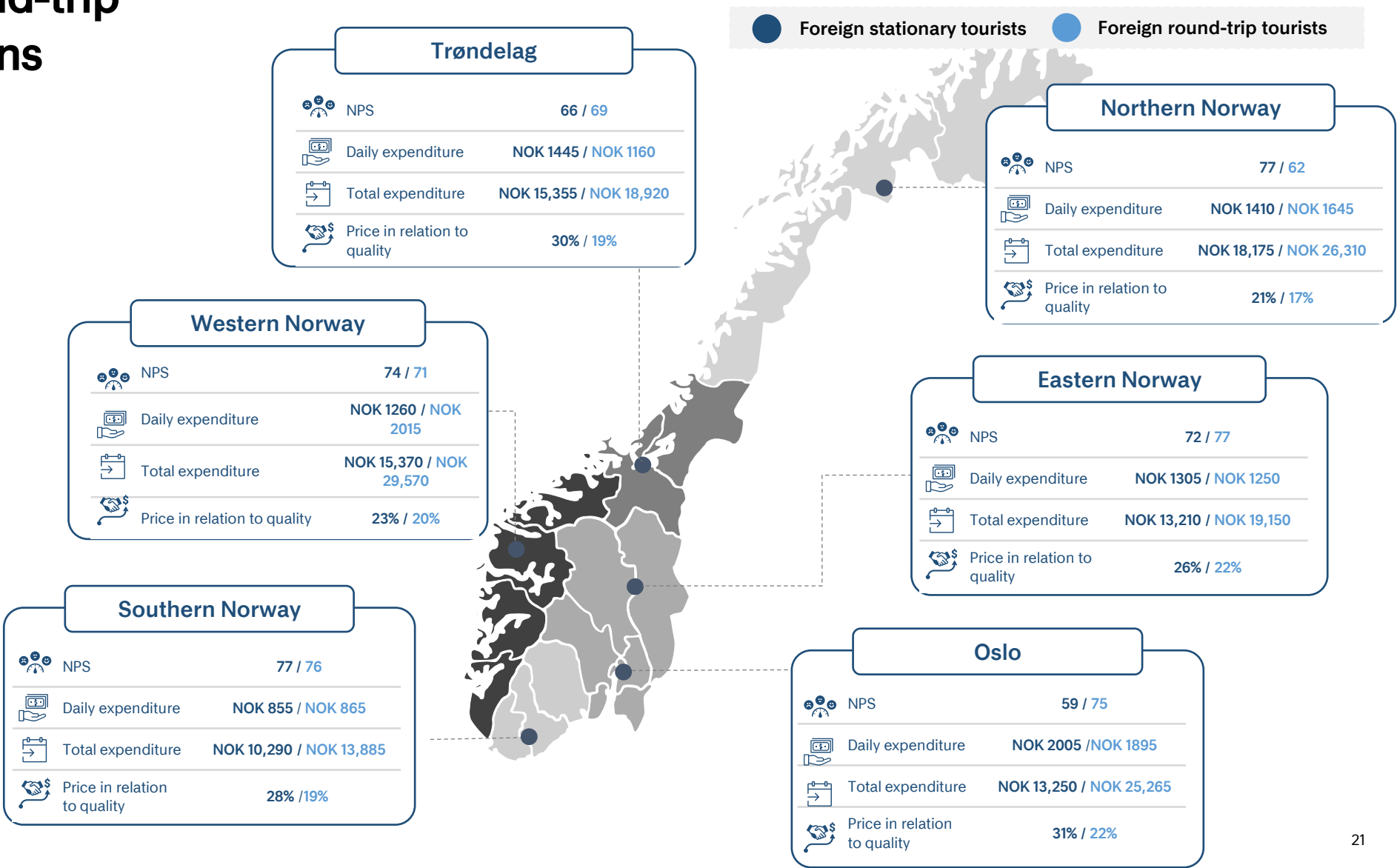
# Stationary and round-trip tourists in the regions

For some regions, there are significant differences between stationary tourists and round-trip tourists in terms of how satisfied they are and how much money they spend.

Tourists who have visited Oslo are much more likely to recommend Norway if they visit Oslo as part of a round trip, rather than if they are staying in Oslo as their base. The opposite is true for Western Norway and Northern Norway.

There are more Swedes on stationary holidays in Eastern Norway and in Oslo, with a higher number of younger tourists. These groups are less willing to recommend Norway as a travel destination.

Round-trip tourists spend more money in total, while stationary tourists are generally more satisfied with the price relative to the quality.





## Topic 2: **Expenditure and travel companions**

Here, we take a look at where the holidaymakers come from, how much money they spend, who they travel with and the type of accommodation they use.



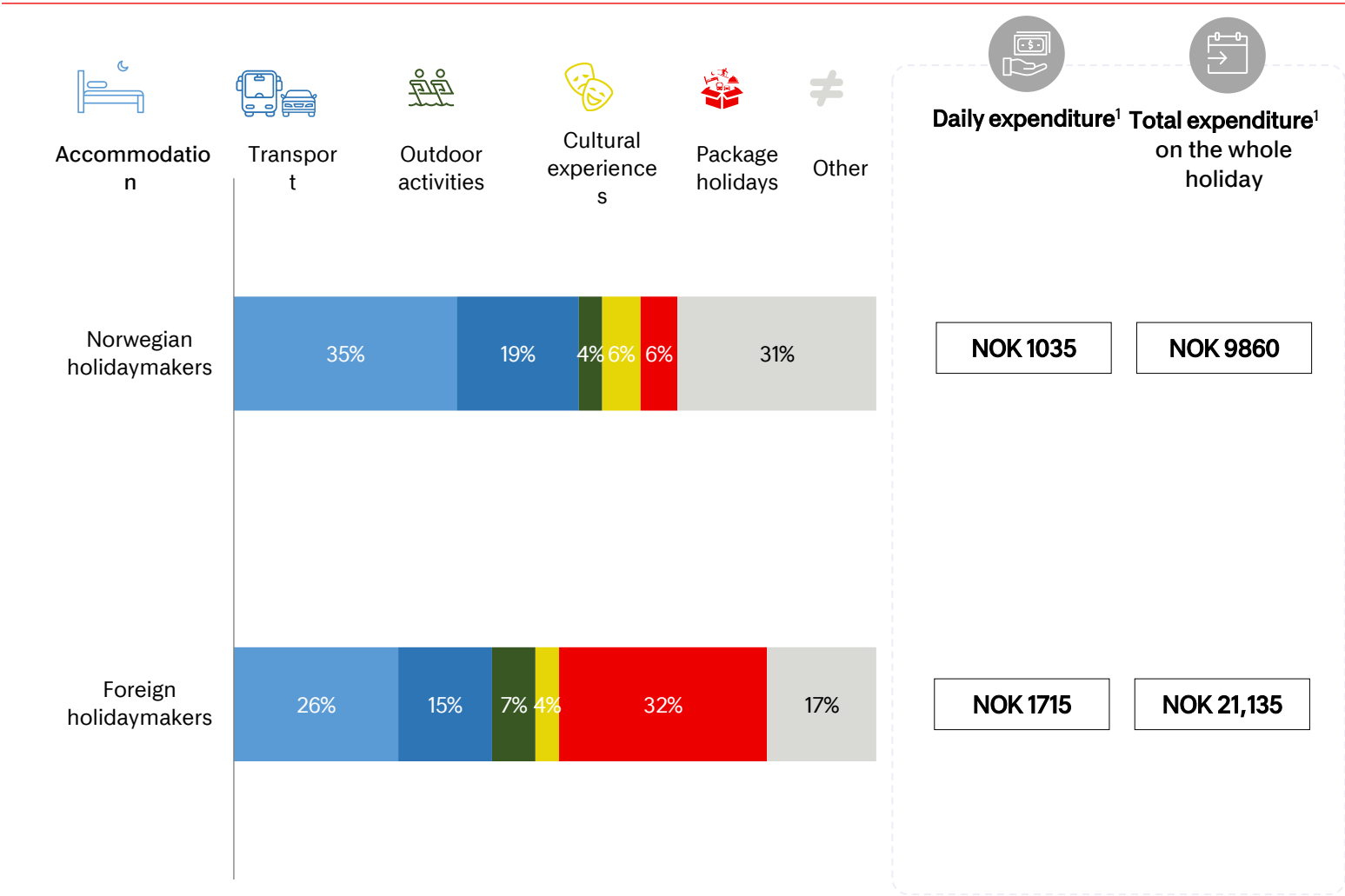
# Daily expenditure and total holiday expenditure

1 in 5 purchases all or part of their trip as a package holiday, and the cost of package holidays accounts for 32 per cent of the expenditure for all foreign tourists. Of those who spend more than NOK 3000 per day, nearly 6 out of 10 have purchased a package holiday, compared to only 2 out of 10 of tourists overall.

Norwegians on holiday spend a much larger proportion of their budget on other expenses, including restaurants and dining, shopping and groceries.

The graph shows how daily expenditure is distributed across various expense items for Norwegian and foreign holidaymakers.

Average daily expenditure per person



NB: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages at or below 2% are not included.

The daily expenditure used on transport to Norway is not included in the calculation of the expenditure for foreign travellers.

<sup>1</sup>The average expenditure has been rounded to the closest NOK 5.

Topic 2: Expenditure and travel companions

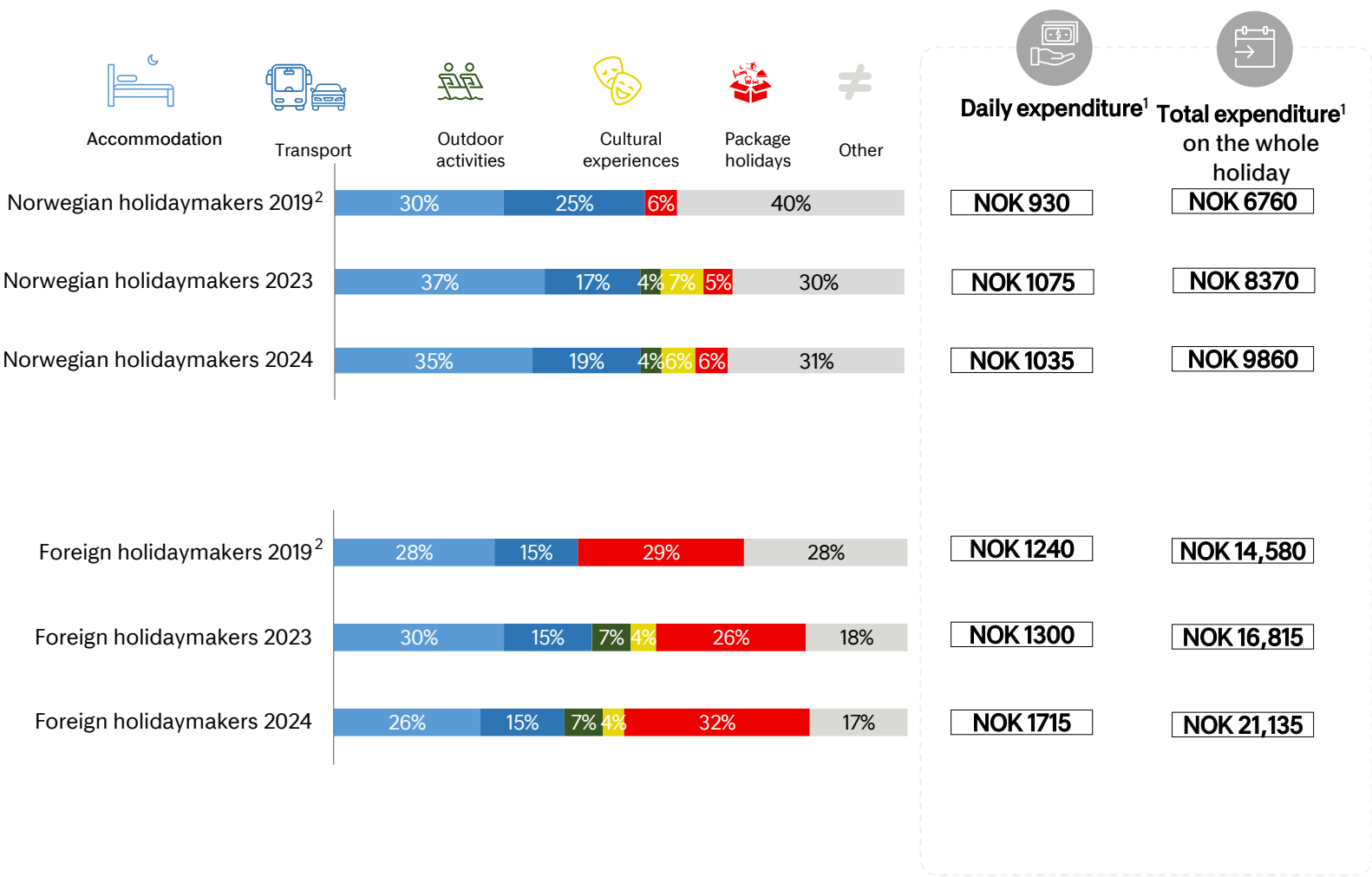
# Expenditure over years

A smaller proportion of overnight stays for foreign tourists was in hotels during the summer of 2024 (23%), compared to the summer of 2019 (31%). Tourists staying in hotels and on Hurtigruten/Havila spend more money than tourists who choose other types of accommodation. This is an important explanation for why the average expenditure has not increased more after the pandemic.

At the same time, the average length of stay has increased by 0.5 days from 2019 to 2024. This means that total expenditure has increased more than daily expenditure after the pandemic.

The graph shows how daily expenditure is distributed across various expense items for Norwegian and foreign holidaymakers.

Average daily expenditure per person

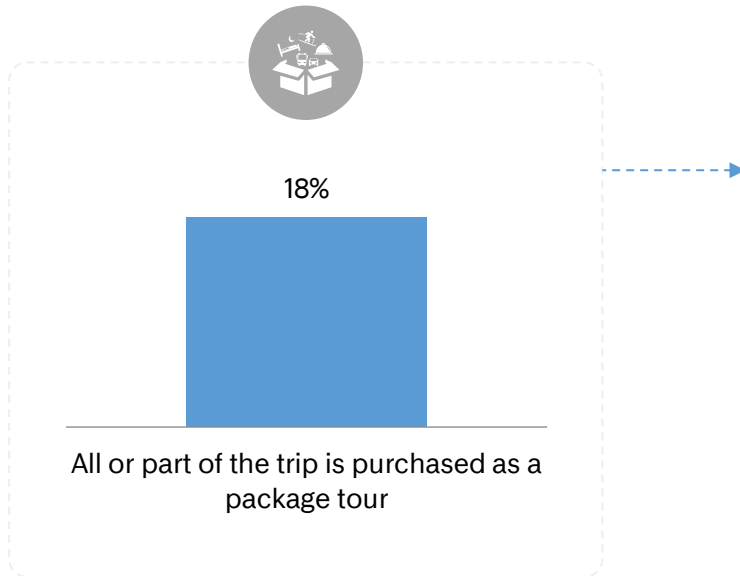


NB: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages at or below 2% are not included.  
The daily expenditure used on transport to Norway is not included in the calculation of the expenditure for foreign travellers.  
<sup>1</sup>The average expenditure has been rounded to the closest NOK 5.  
<sup>2</sup> In 2019, expenditure on outdoor activities and cultural experiences is included in the 'other' expenditure group.

## Topic 2: Expenditure and travel companions

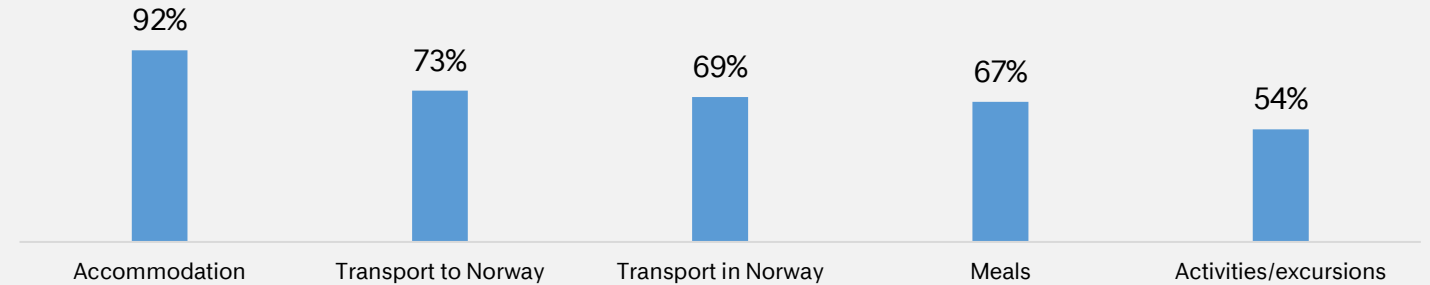
# What is included in package holidays?

Very few tourists from the Netherlands purchase package holidays, while the highest proportion of package holidays is from Asia and Denmark.



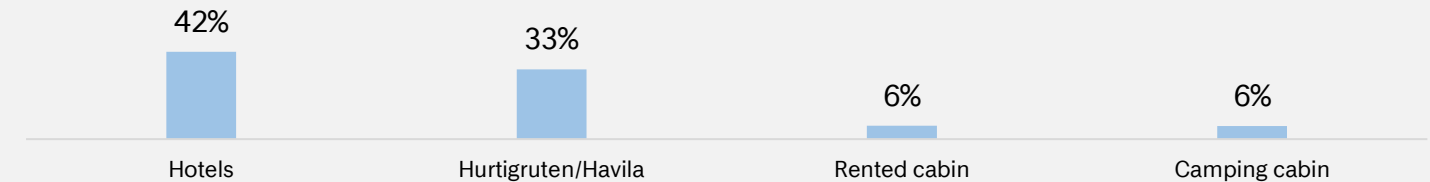
### What is included in the package holiday?

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



### Distribution of overnight stays according to top 4 accommodation types

Distribution of overnight stays according to different types of accommodation for international Northern Lights tourists who have stated that accommodation is part of their package holiday.



NB: 13 per cent of all foreign summer tourists have purchased a package holiday that includes all or parts of their transport to Norway. 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 summer tourist spends an average of NOK 5245 on transport to Norway, which amounts to NOK 420 per day.



Topic 2: Expenditure and travel companions

# Americans and Asians spend the most

Americans and Asians spend the most money per day on their holiday. They spend more money per day on all the expenditure items we measure. More on accommodation and activities, and more on other expenditure (restaurants, shopping etc.).

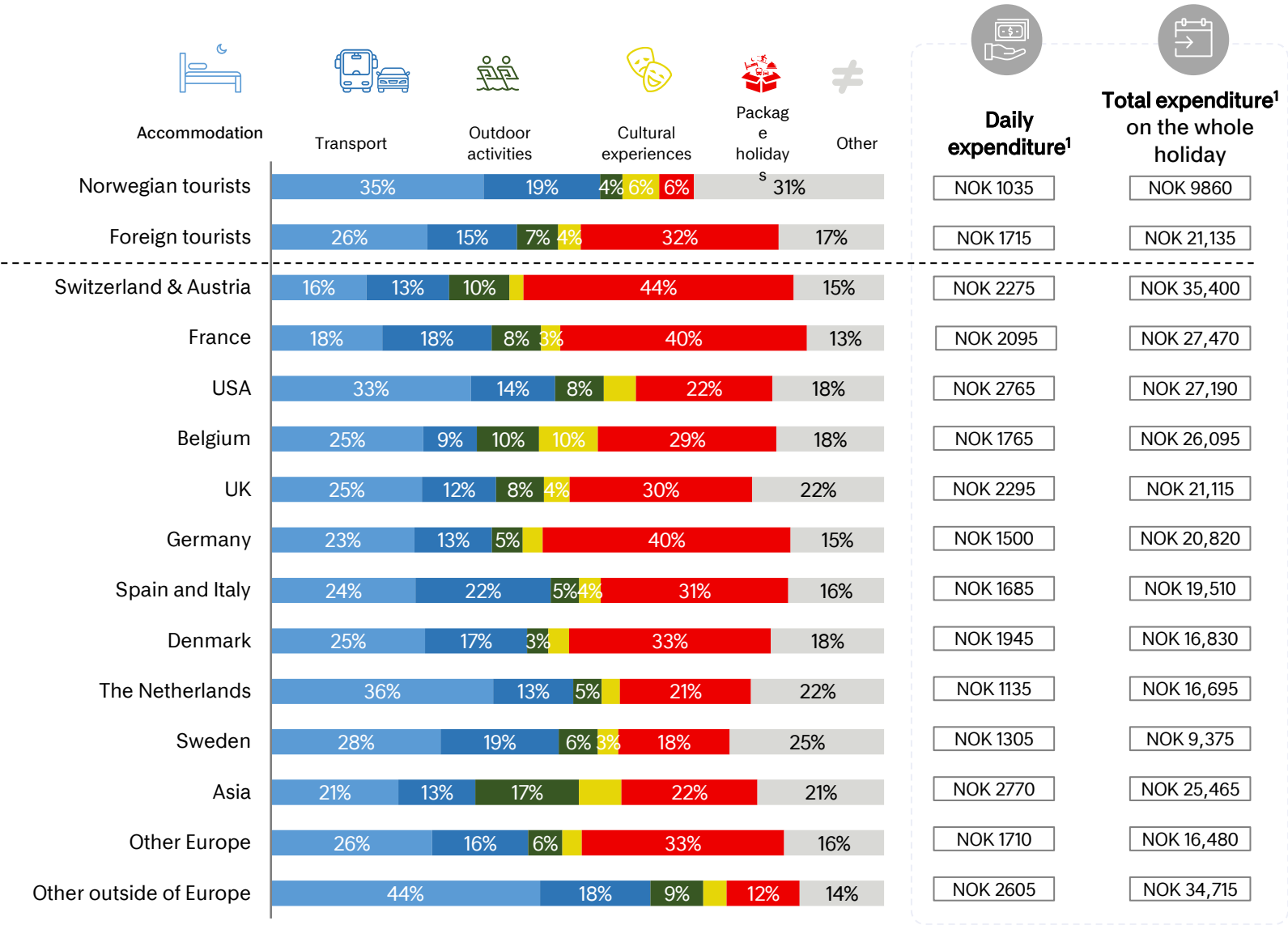
The Netherlands stands out with the lowest expenditure while also staying the longest in the country (14.7 days). One in four travels by campervan, and 4 out of 10 overnight stays are at campsites. Only 16% of overnight stays are in hotels or Hurtigruten/Havila.

Switzerland/Austria have a high proportion of camping outside campsites (18%), yet still have a high expenditure. They also have a high proportion of stays in hotels and on Hurtigruten/Havila. Those who have purchased package holidays have bought expensive ones, contributing to raising the average expenditure.

**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 checked for typing errors and outliers (for both very low and very high expenditure).

Average daily expenditure and total expenditures on holiday per person



NB: 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.

<sup>1</sup>The average expenditure has been rounded to the closest NOK 5.

## Topic 2: Expenditure and travel companions

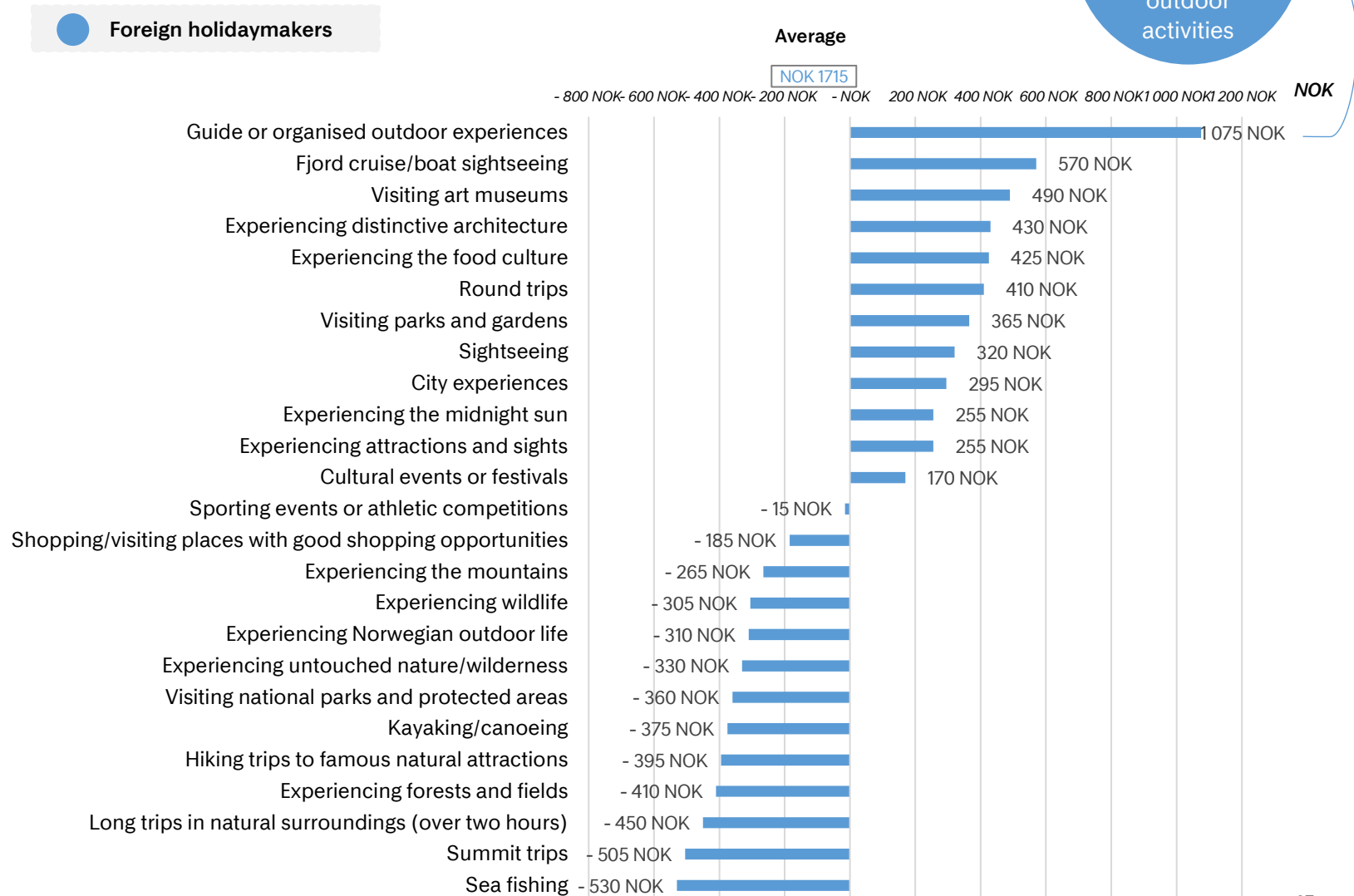
# What drives expenditure?

Those with the highest expenditure stay much more frequently at hotels, Hurtigruten/Havila, and tend to visit Northern Norway and Oslo to a greater extent. They stay in Norway for 1-2 weeks, are in the 50+ age group, and primarily travel with a spouse/partner. 1 in 3 are from Germany, but there are also many Americans, French, British, and tourists from Austria/Switzerland.

7 out of 10 arrive by aeroplane. They are more interested in trying something new and seeking a varied range of activities, as well as avoiding heatwaves and extreme heat. A total of 6 out of 10 have purchased package holidays and participated in organised outdoor activities/activities with a guide.

They are keen to experience spectacular scenery in general and the midnight sun in particular. They dine more often at restaurants, are more interested in culinary experiences, and are more satisfied with the food options. Many have culinary experiences included in their package holiday.

Foreign holidaymakers' average daily expenditure<sup>1</sup> across selected activities



Topic 2: Expenditure and travel companions

# Activities that affect expenditure

The graph shows the relationship between the activities tourists engage in and their average daily expenditure.

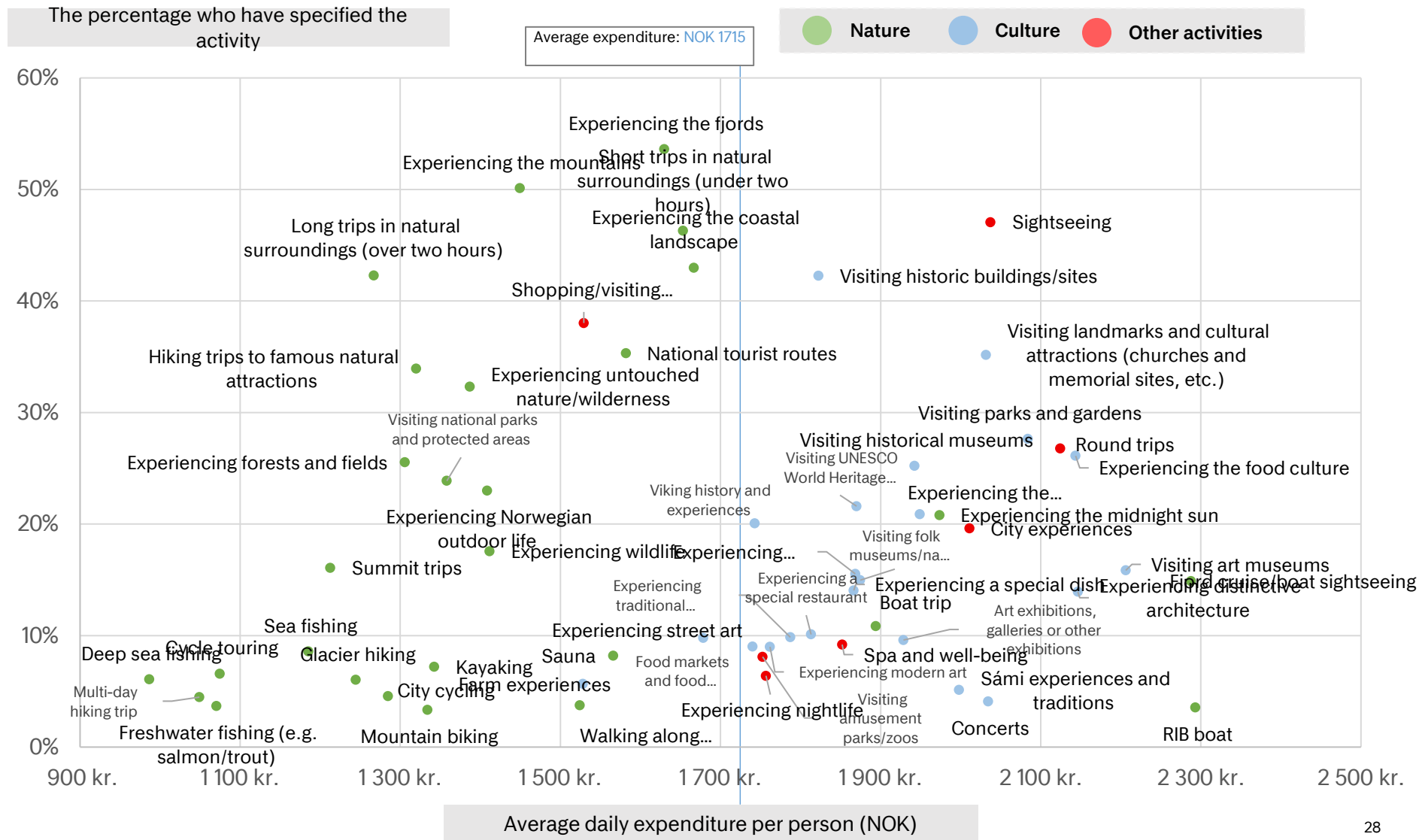
The vertical axis shows the percentage of tourists who have engaged in a particular activity.

The horizontal axis shows average daily expenditure.

Those positioned far to the right and high up have both an expenditure well above average and a high number of participants doing the activity, such as sightseeing, landmarks and cultural attractions.

Foreign holidaymakers' average daily expenditure across selected activities

The colours of the circles show the type of activity





## Topic 2: Expenditure and travel companions

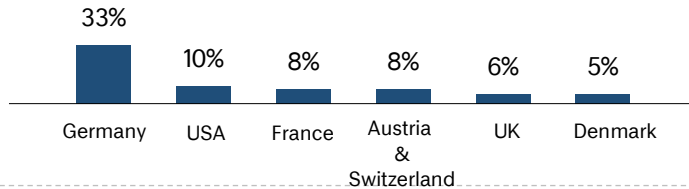
# Tourists who spend more than NOK 3000 per day

 Tourists with expenditure over NOK 3000 per day

 All foreign holidaymakers

A foreign holidaymaker, spending more than NOK 3000 per day on their holiday

Top 6 holiday markets



The vast majority are keen on experiencing both spectacular nature and cultural attractions during their holiday. Nearly 8 out of 10 overnight stays are at hotels or on Hurtigruten/Havila, and 7 out of 10 arrive by aeroplane.

They are much more likely to purchase package holidays that include almost everything: accommodation (95%), meals (81%), activities/excursions (52%), and transport to and within Norway (79%, 85%). A total of 46 per cent have participated in organised outdoor activities/activities with a guide. These tourists are more satisfied in most areas, yet they are less willing to recommend Norway than the average, with an NPS of 66.



**3.4 / 2.9**  
Average number of travelling companions<sup>1</sup>



**16% / 25%**  
Travelling with children under 18 years old



**47% / 42%**  
Are women



**53.7 years of age / 49.5 years of age**  
Average age



**NOK 6110 / NOK 1715**  
Average daily expenditure<sup>2</sup> while on holiday in Norway



**56% / 47%**  
Are visiting Norway for the first time



**9.9 / 12.3**  
Average number of overnight stays in Norway



**65 / 70**  
NPS



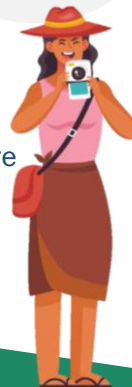
**16%**  
Of the foreign travellers are tourists with high expenditure



**46% / 23%**  
Have had outdoor experiences with a guide or as an organised trip



**58% / 18%**  
Have purchased all or part of the trip as a package holiday



<sup>1</sup>Travel companions refer to the total number of people travelling together on this holiday.

<sup>2</sup>The average expenditure has been rounded to the closest NOK 5.

## Topic 2: Expenditure and travel companions

# The vast majority on holiday in Norway are over 30 years old

Only 16 per cent of foreign holidaymakers are under the age of 30.

Tourists over 50 years old have higher expenditure and take longer holidays in Norway. They are more likely to travel with Hurtigruten/Havila but also by campervan.

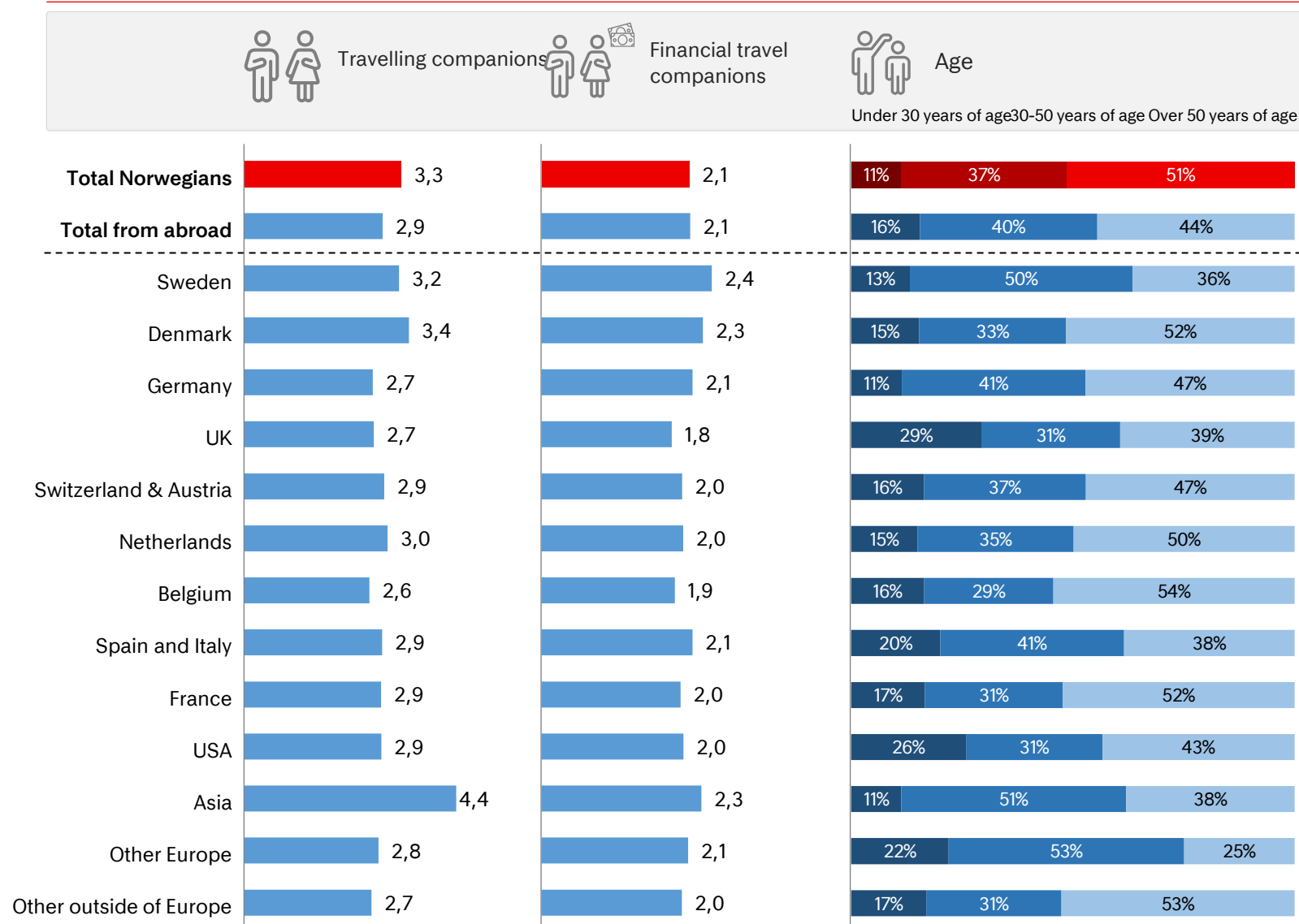
The youngest tourists spend 1 in 4 nights camping in tents, are more likely to rent privately, but they also spend 1 in 5 overnight stays at a hotel.

### Definition of travel companions

**Travel companions** refers to the number of people who specify they are travelling together.

**Financial travel companions** refers to the number of people travelling together who share finances and expenses during the trip.

## Average number of travelling companions per holiday market



## Topic 2: Expenditure and travel companions

# 1 in 5 travel with children on their holiday.

Tourists from neighbouring countries are much more likely to travel with children, and especially with young children. This is especially the case for Swedes, where 1 in 3 travel with children, and 63 per cent travel with children under 7 years old.

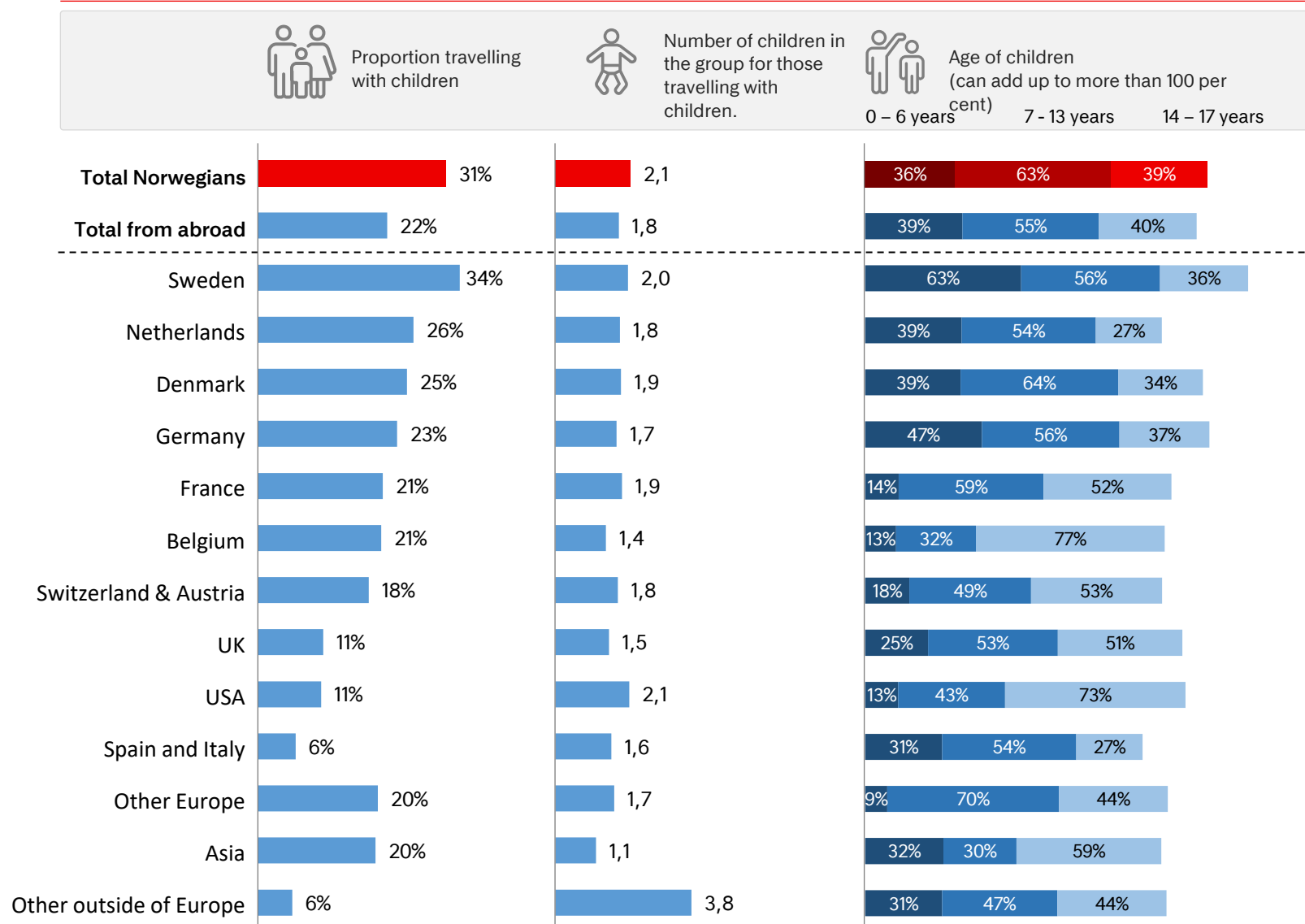
It is particularly the age group 40-50 years that travels with children (57%).

### Definition of travel companions

**Travel companions** refers to the number of people who specify they are travelling together.

**Financial travel companions** refers to the number of people travelling together who share finances and expenses during the trip.

## Average number of travelling companions per holiday market



Topic 2: Expenditure and travel companions

# The vast majority are in Norway for two weeks or less

Among tourists from the Netherlands, Belgium, Germany, and Switzerland & Austria, there is a large group of visitors who stay in Norway for 15 nights or more. These tourists contribute to increasing the average length of stay for these markets.

In all markets, the vast majority of tourists in Norway stay for up to two weeks.

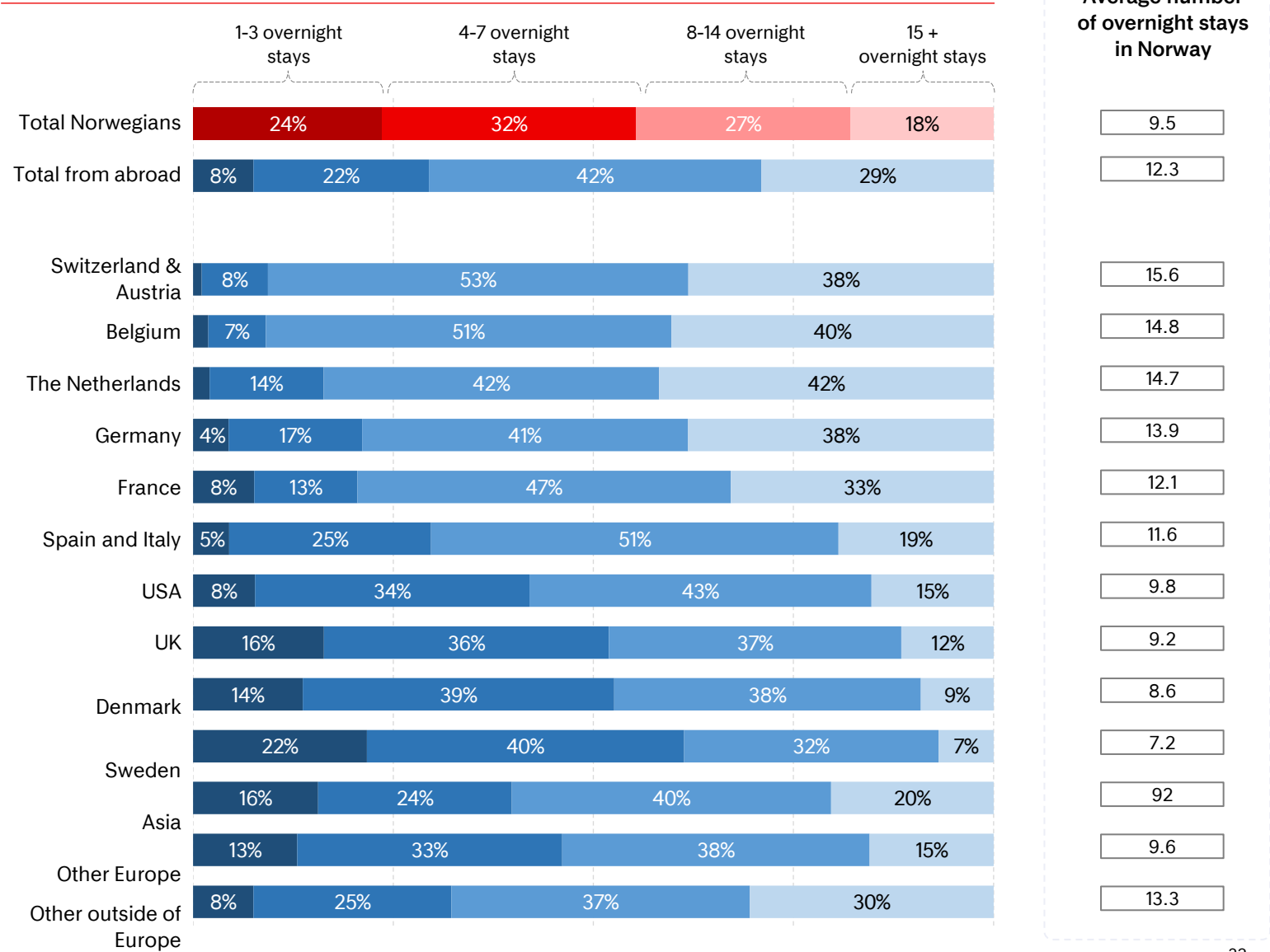
The majority of tourists from Denmark, Sweden and the UK are in Norway for up to 1 week.

Tourists from the USA are more likely to combine their holiday in Norway with visits to other countries, with 1 in 4 having overnight stays in other countries in addition to Norway during their trip. The same applies to visitors from other countries outside Europe and from Asia, who are on a round trip and visit several countries in addition to Norway.



NB: Percentages at or below 2% are not included.

Number of overnight stays divided into intervals and the average number of overnight stays.







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

Here we take a closer look at the types of outdoor experiences and activities that summer tourists engage in.

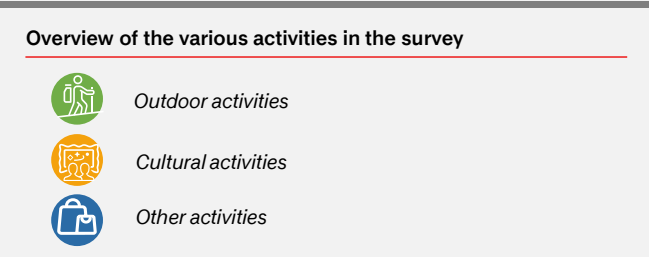
Topic 3: Nature experiences and outdoor activities

Overview of the activities

In the Tourist Survey, there are many questions where tourists respond about what they have done or plan to do during their holiday.

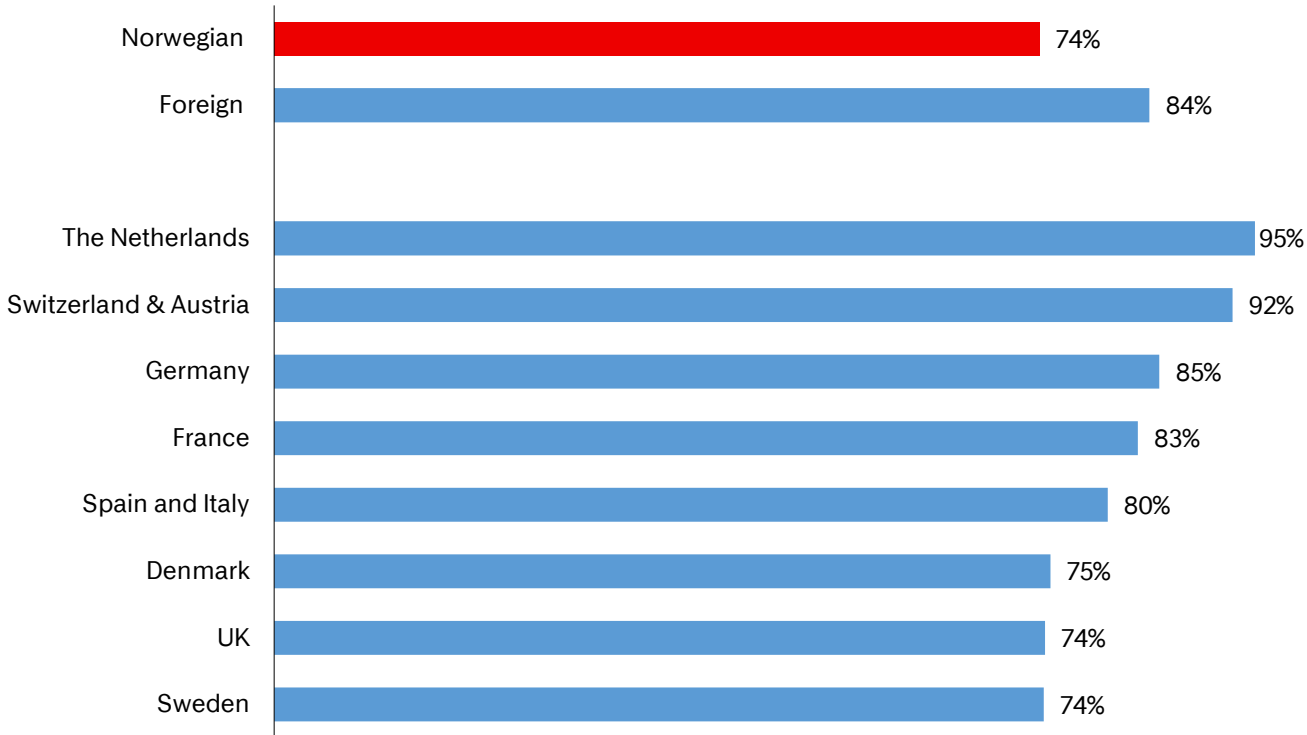
All tourists are asked introductory questions about activities in some general categories, such as nature experiences, hiking, cycling, fishing, water activities, and sunbathing and swimming. Only those who respond positively that they have done or plan to do any of these activities receive more detailed follow-up questions. For example, if a tourist answers yes to fishing during their holiday, they will be asked whether they have done sea fishing, deep-sea fishing, freshwater fishing, or other fishing activities.

Below is an overview of the nature experiences and outdoor activities tourists engage in during their holiday, including both the main categories and the detailed activities. Note that only those who have responded positively about fishing have been asked about deep-sea fishing, etc. The same applies to nature experiences; only those who have responded positively have been asked about fjords, mountains and coastal landscapes.



Proportion of tourists with outdoor activities from selected markets

Have specified one or more outdoor activities



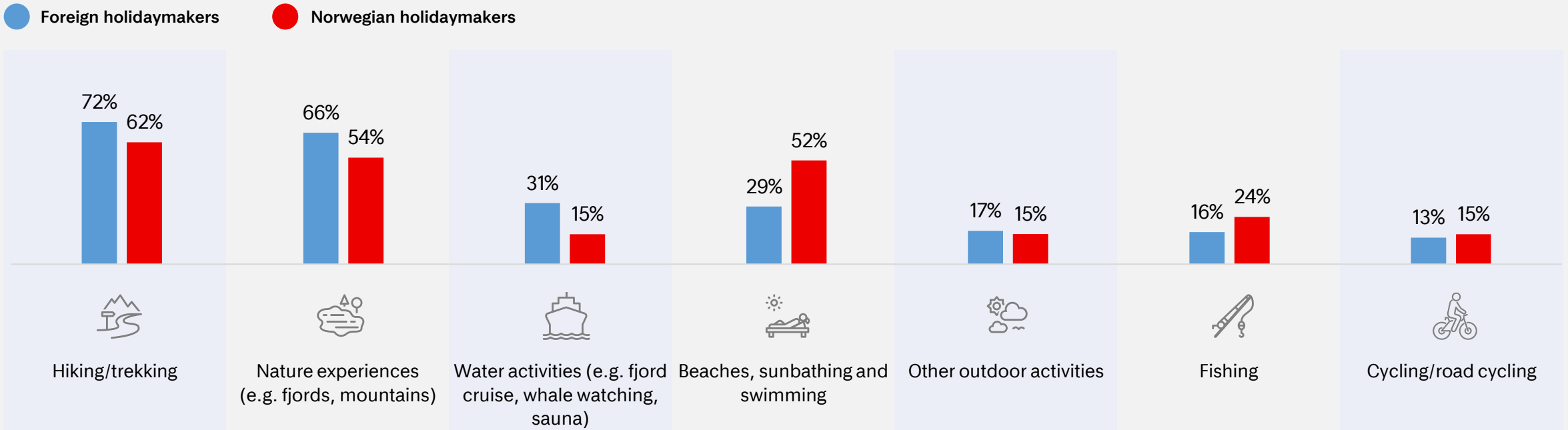
# The vast majority engage in outdoor activities

Various forms of hiking and trekking are the most popular outdoor activities among foreign tourists, closely followed by nature experiences such as exploring fjords, mountains, the midnight sun, and wilderness. As many as 30 percent want to experience sun and swimming on their holiday. Only six per cent of those travelling for holiday and leisure purposes do not intend to participate in any of the outdoor activities listed in the graph below.



## Have you already done, or do you plan to do, any of the following outdoor activities on this trip to Norway?

The proportion of holidaymakers who have specified the activity.



Topic 3: Nature experiences and outdoor activities

# Spectacular nature and peace and quiet are important for the majority of people

Foreign tourists are 'nature tourists', meaning they have sought out nature experiences and/or outdoor activities during their holiday in Norway. They do this primarily to experience spectacular nature and peace and quiet.

Many also come to keep cool and avoid heat waves and extreme heat. This is especially the case for tourists from Spain/Italy (39%) and Switzerland/Austria (32%).

Norwegians (19%) and Germans (18%) are more interested in harvesting natural resources. People from the UK, Asians, and tourists from countries outside Europe are more interested in trying something new and seeking a diverse range of activities and experiences.

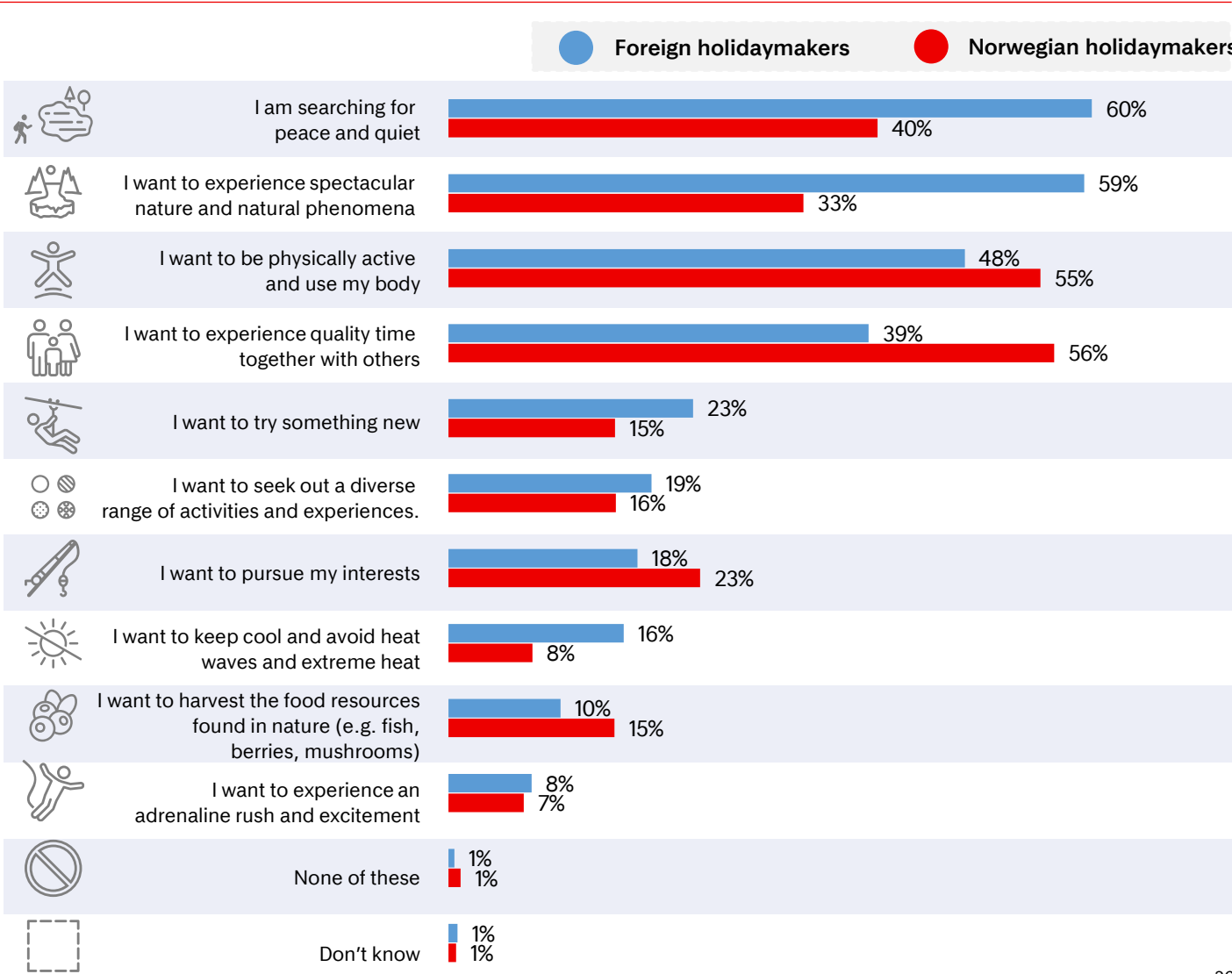


Outdoor activities



NB: This page focuses on the motivations of holidaymakers who have engaged in outdoor activities. Percentages are based on all holidaymakers.

When you spend time outside in nature on this holiday in Norway, which of the following statements best describes what you are looking for?  
The proportion of holidaymakers who have specified 'Yes'.





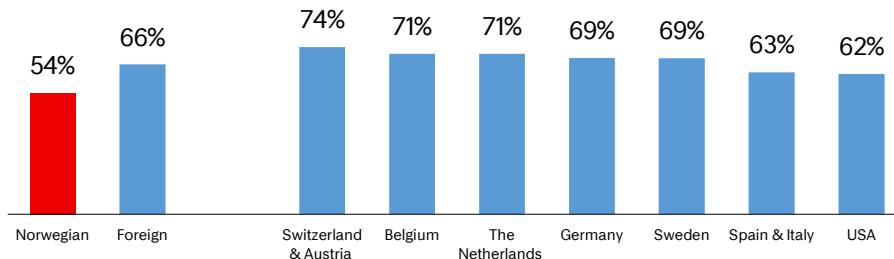
### Topic 3: Nature experiences and outdoor activities

## Fjords and mountains top the list of nature experiences

2 out of 3 foreign tourists want to experience nature on their holiday in Norway. The fjords and mountains top the list of nature experiences tourists want to have on their trip.

The fjords are the most popular, and nature experiences are most appealing to those under 50 years old.

Have had or plan to have **nature experiences** on this holiday in Norway



Outdoor activities

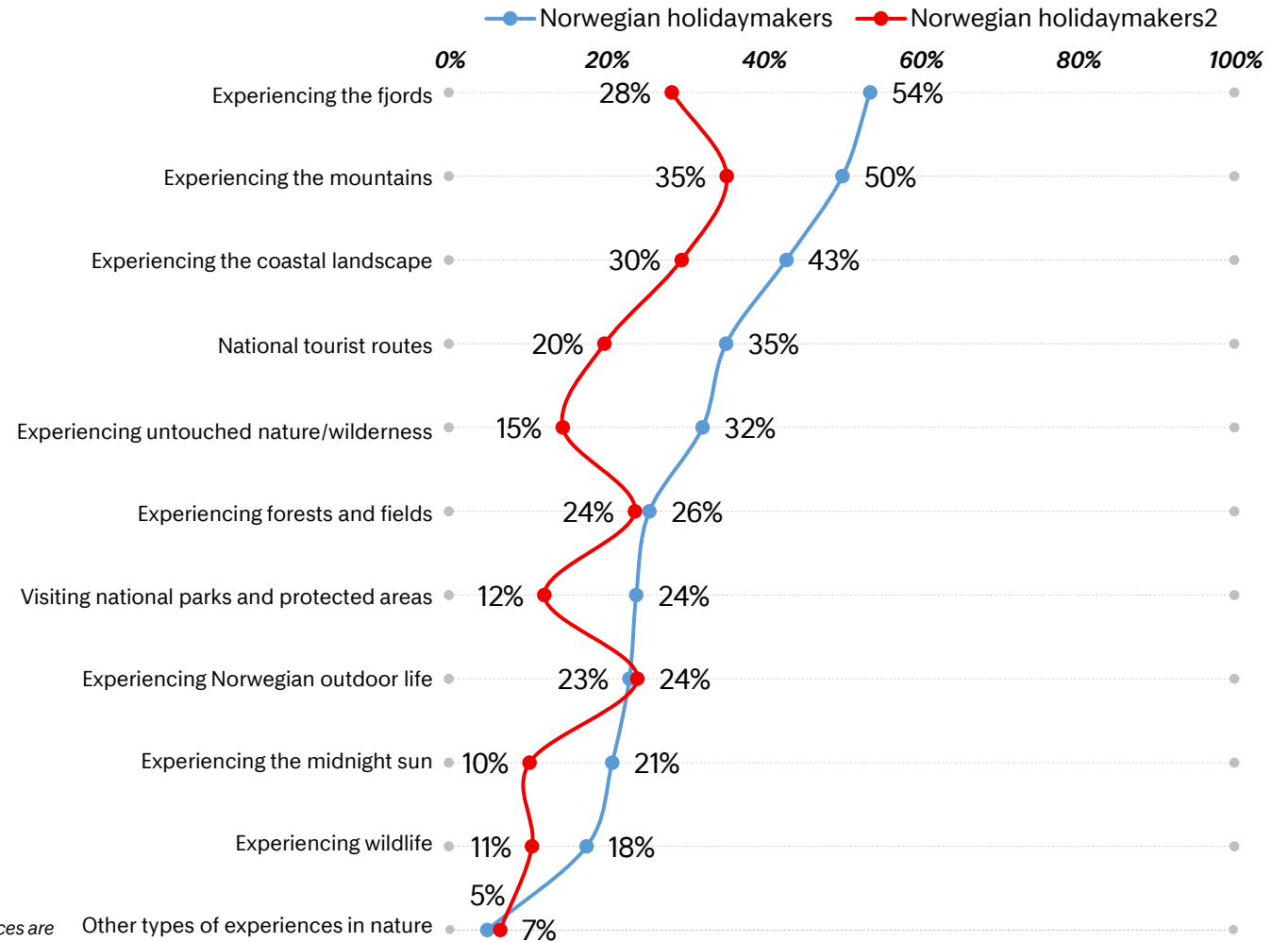


Innovasjon Norge

<sup>1</sup>Only those who have answered that they have or want to participate in nature experiences are given follow-up questions encouraging them to elaborate on the nature experiences they have participated in or want to participate in. The figures in the graph on the right are converted to the percentage of all holidaymakers.

### What type of activities (nature experiences) have you done or plan to do?

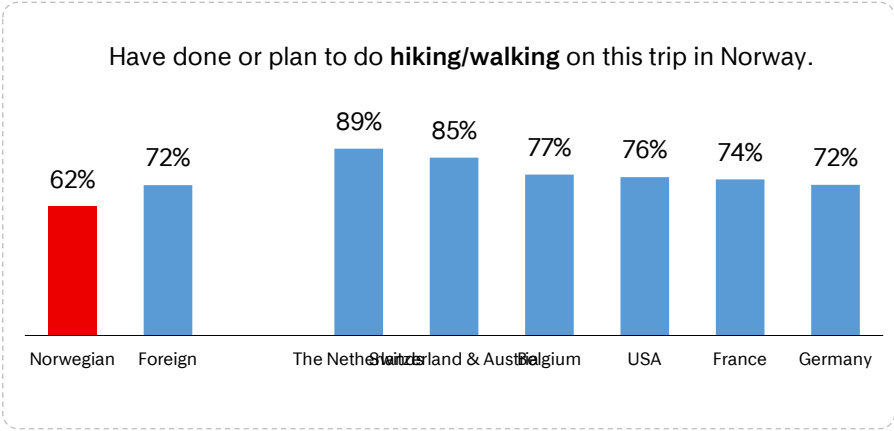
The proportion of holidaymakers who have specified the activity<sup>1</sup>



Topic 3: Nature experiences and outdoor activities

# Hiking is the most popular outdoor activity while on holiday in Norway

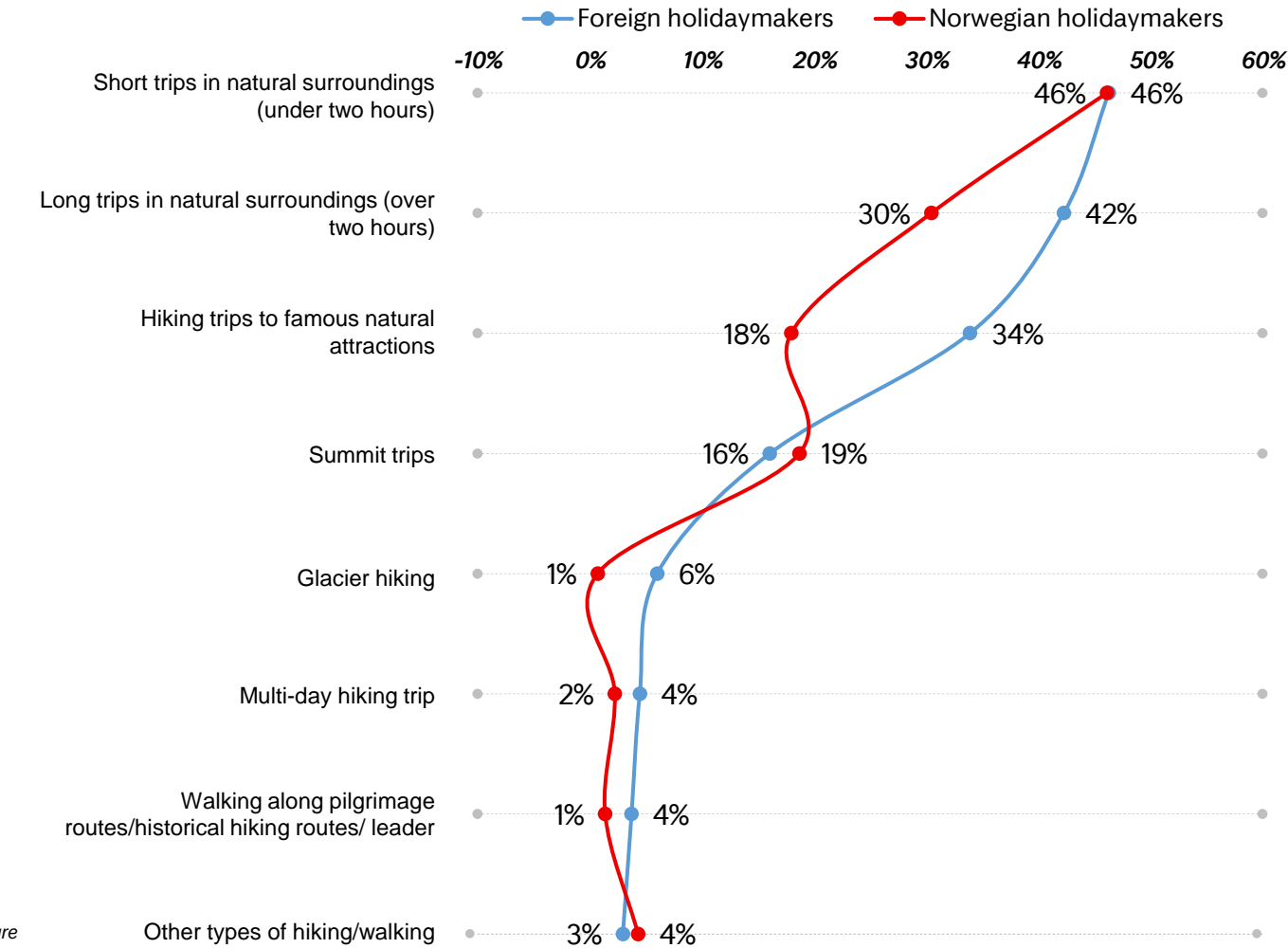
Americans settle for short trips. The Dutch prefer longer hikes (56%), trips to well-known natural attractions (45%), and summit trips (21%). Tourists from Switzerland/Austria and France can be compared to the Dutch; they also prefer longer hikes and summit trips.



<sup>1</sup>Only those who answered that they have participated in or want to participate in nature experiences are given follow-up questions encouraging them to elaborate on the hiking experiences they have participated in or want to participate in. The figures in the graph on the right are converted to the percentage of all holidaymakers.

## What type of (hiking) activities have you done or do you plan to do?

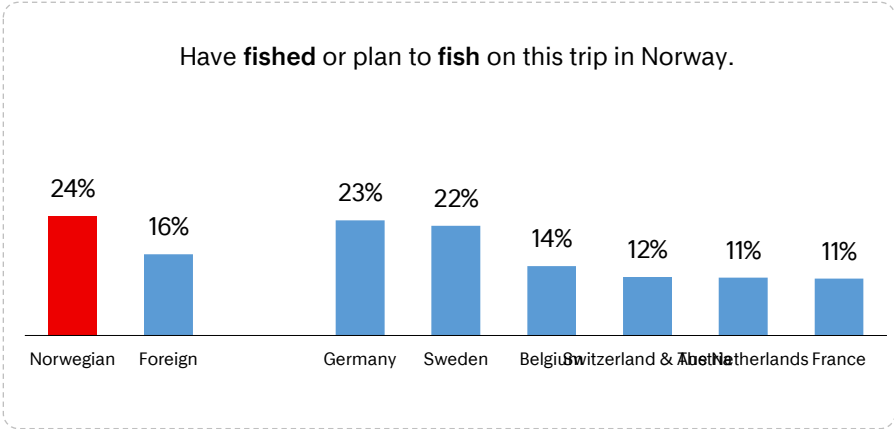
The proportion of holidaymakers who have specified the activity<sup>1</sup>



Topic 3: Nature experiences and outdoor activities

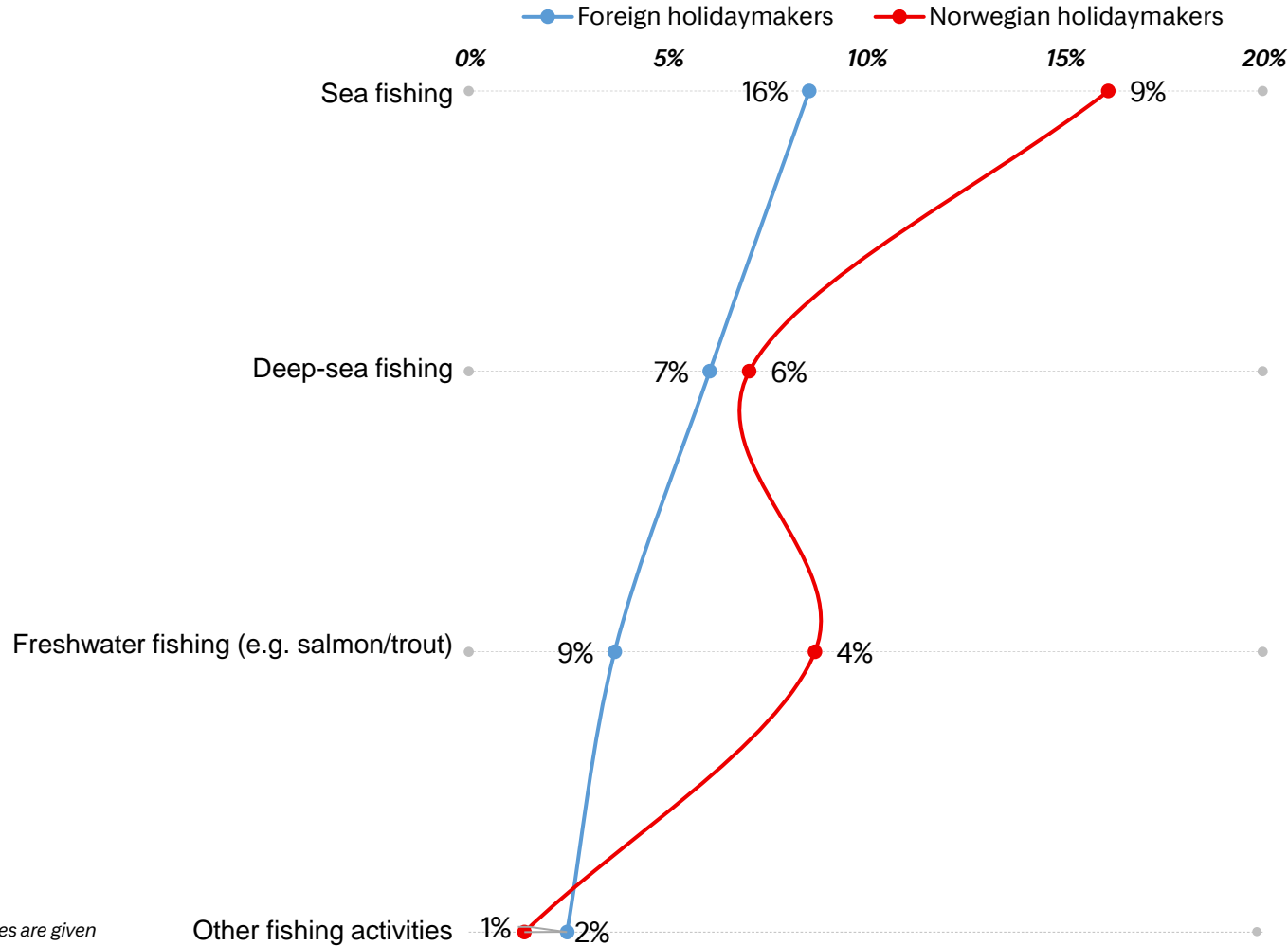
1 in 5 from Germany and Sweden fish

Swedes are most likely to engage in deep-sea fishing and freshwater fishing, while Germans are equally likely to go sea fishing and deep-sea fishing, but they fish in freshwater to a much lesser extent.



<sup>1</sup>Only those who have answered that they have or want to participate in fishing activities are given follow-up questions encouraging them to elaborate on the fishing activities they have participated in or want to participate in. The figures in the graph on the right are converted to the percentage of all holidaymakers.

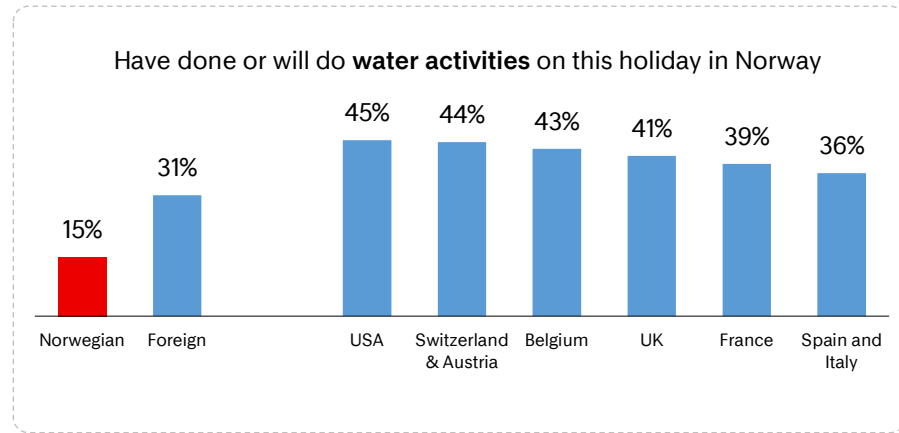
What type of (fishing) activities have you done or plan to do?  
The proportion of holidaymakers who have specified the activity<sup>1</sup>



### Topic 3: Nature experiences and outdoor activities

## The interest in fjord cruises increases with the distance to Norway

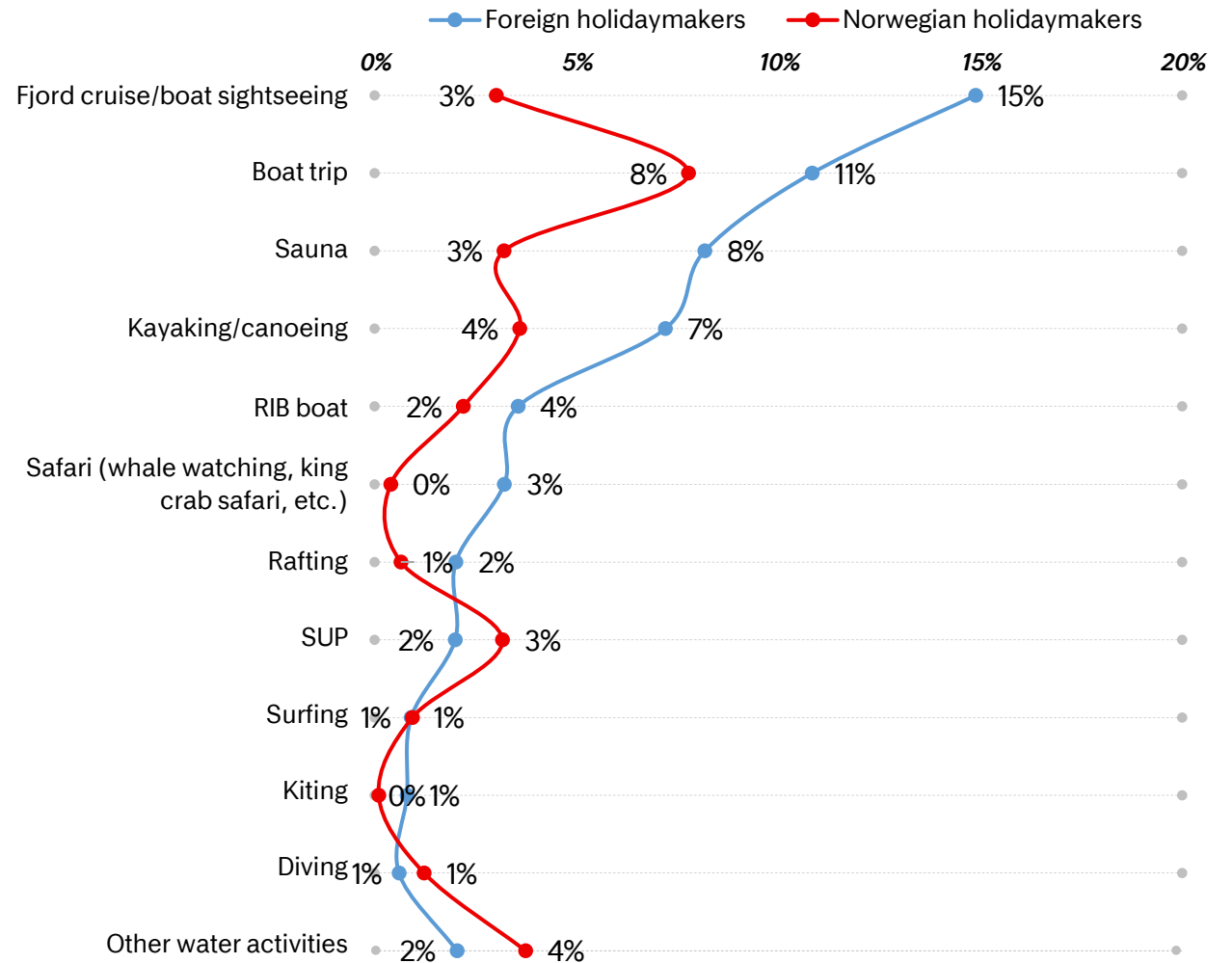
The interest in fjord cruises, boat sightseeing and RIB boat trips is highest among Americans, closely followed by tourists from Switzerland & Austria and Asia. The interest in kayaking/canoeing is highest in the USA (11%), Spain & Italy (11%), and France (10%).



Outdoor activities

### What type of (water) activities have you done or are you planning to do?

The proportion of holidaymakers who have specified the activity<sup>1</sup>



<sup>1</sup>Only those who have answered that they have or want to participate in water activities are given follow-up questions encouraging them to elaborate on the water activities they have participated in or want to participate in. The figures in the graph on the right are converted to the percentage of all holidaymakers.



### Topic 3: Nature experiences and outdoor activities

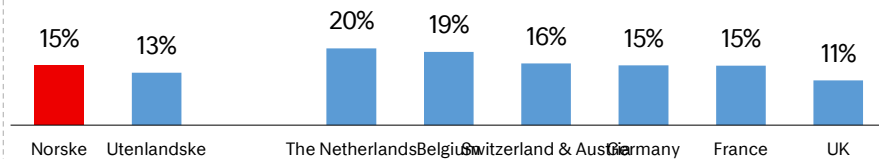
## Cycle touring is the most popular cycling activity

Very few people report using a bicycle as a means of transport in Norway (3%), but many cycle during their holidays.

Approximately

1 in 10 from Norway, the Netherlands, Switzerland & Austria and Germany go on cycling trips. Campervan tourists are the most enthusiastic cyclists, but many cyclists also stay in hotels.

Have done or will do **cycling/road cycling** activities on this holiday in Norway



Outdoor activities

### What type of (cycling) activities have you done or are you planning to do?

The proportion of holidaymakers who have specified the activity<sup>1</sup>

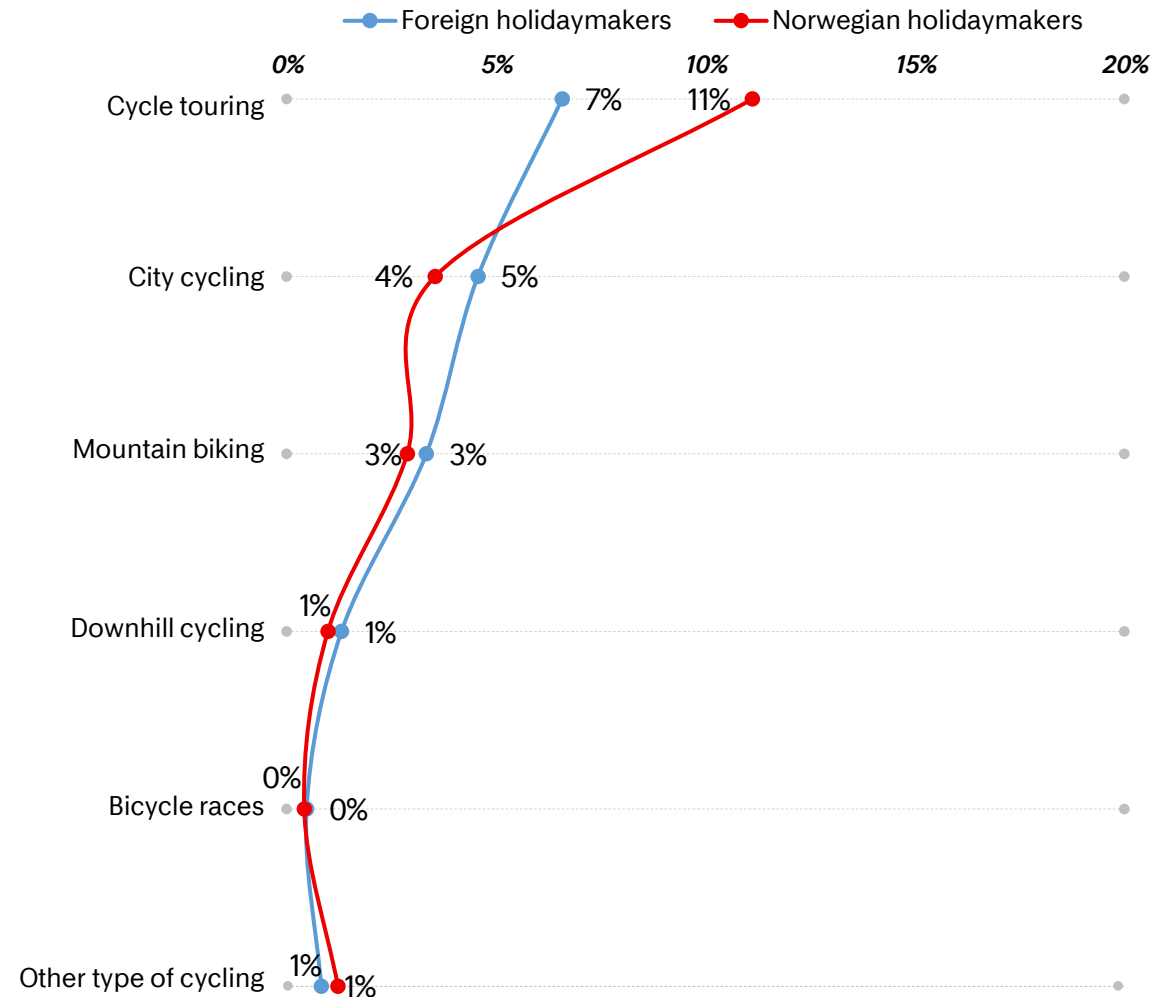




Photo: Foap - VisitNorway.com

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

Who are the cultural tourists, where do they come from and what do they want to experience on their holiday in Norway?

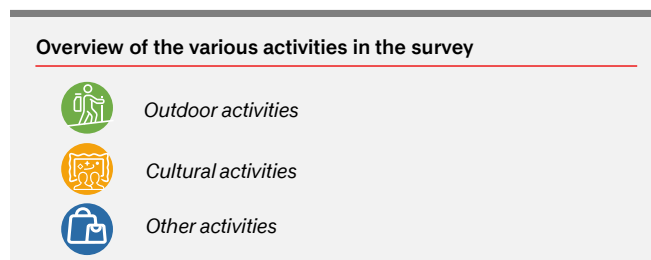
## Topic 4: Cultural and city experiences

# Overview of cultural activities and experiences

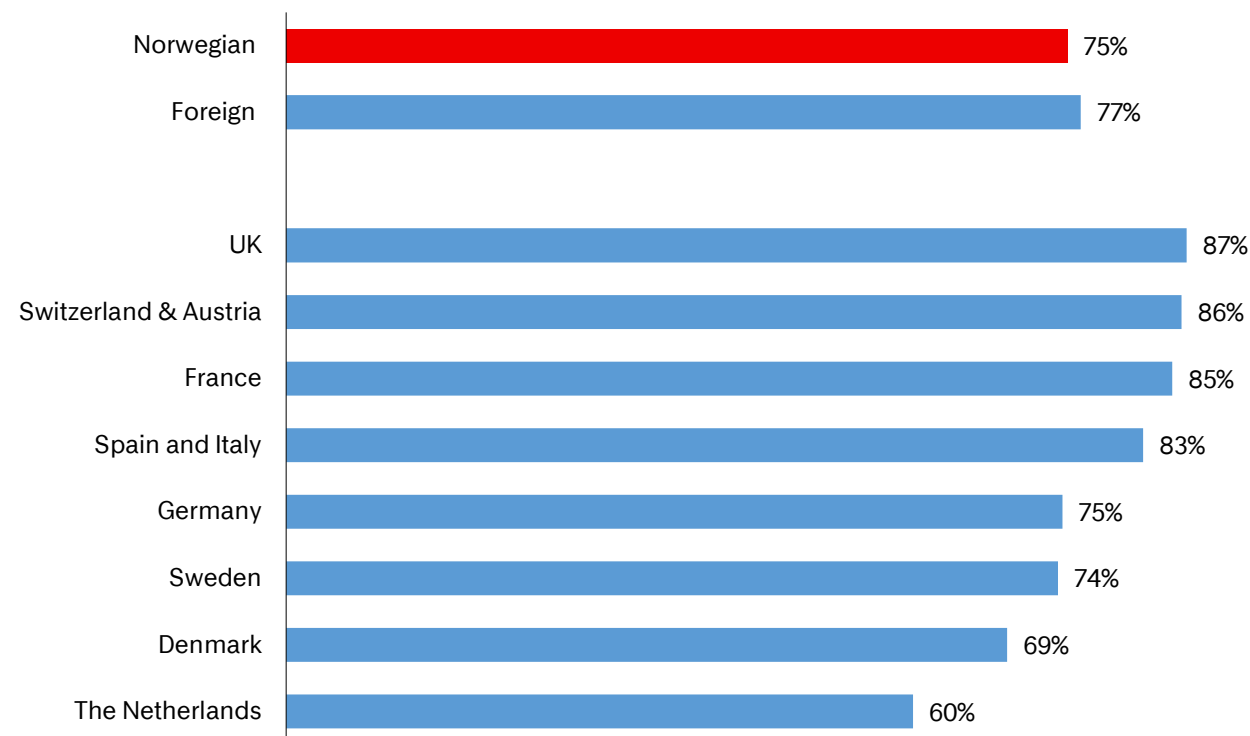
All tourists are asked introductory questions about various forms of cultural activities and experiences.

- history and cultural heritage
- art and Architecture
- theatre, concerts and performances
- attractions and sights
- lifestyles and traditions
- culinary experiences

If they have answered that they have done or plan to do any of the activities mentioned above, they receive follow-up questions about specific activities and experiences within the respective categories. 77 per cent of foreign tourists participate in at least one cultural activity during their holiday.



**Proportion of tourists involved in cultural activities for Norway and foreign markets**  
Has specified one or more cultural activities



Topic 4: Cultural and city experiences

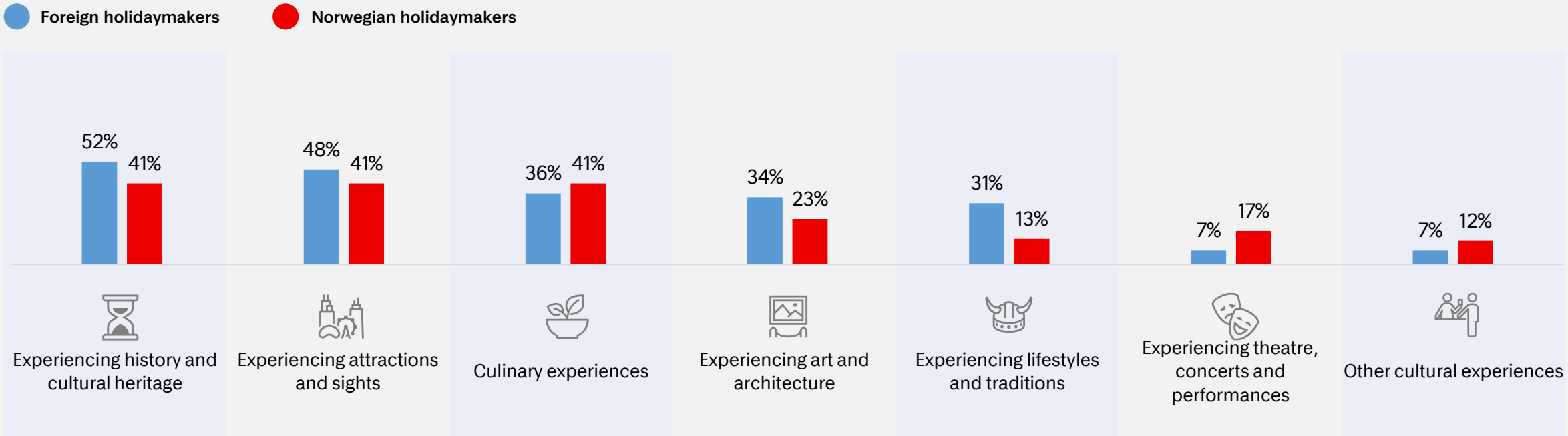
# The majority want to experience history and cultural heritage

Experiencing history and cultural heritage, attractions and sights is the most popular activity across all age groups. Tourists under the age of 40 are most interested in culinary experiences, culture and lifestyle, while older tourists tend to be more interested in art and architecture. Tourists from Spain, Italy, and the USA are most interested in culinary experiences, while Norwegians are much more likely to attend theatres, concerts and performances during their holiday.



## Have you already done, or do you plan to do, any of the following outdoor activities on this trip to Norway?

The proportion of holidaymakers who have specified the activity





#### Topic 4: Cultural and city experiences

## They want to get to know the places they visit better.

Most people who engage in cultural activities want to get to know the places they visit better. This is especially the case for tourists from the UK, Spain & Italy, but also for Norwegians.

Those who come from far away are more interested in exploring something new and exciting, as well as a diverse range of cultural activities and experiences.

Tourists under the age of 40 are more interested in meeting people, learning and immersing themselves, and pursuing their own interests.

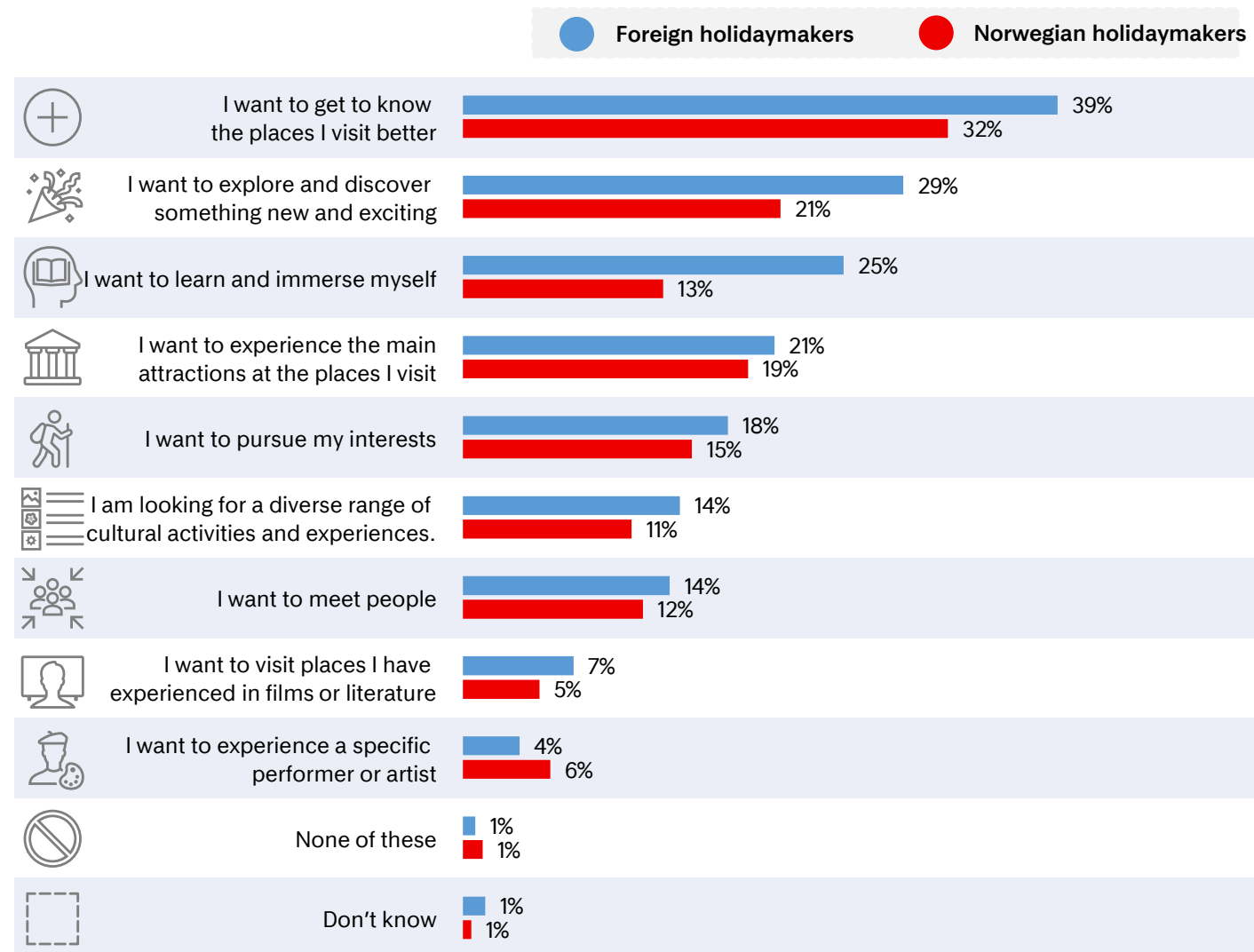
The oldest tourists prioritise visiting the most important attractions and sites.



Cultural activities

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

The proportion of holidaymakers who have specified 'Yes'<sup>1</sup>

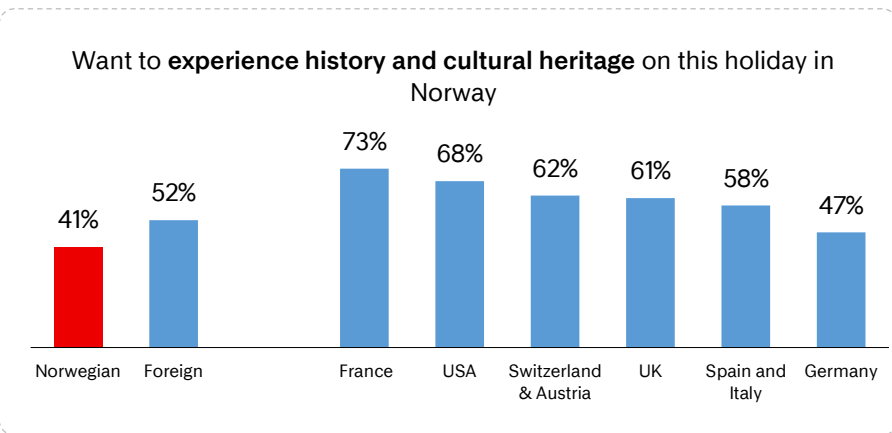


## Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

Tourists with high expenditure are more interested in art and architecture. Those aged 50+ are more focused on history, world heritage, and the Viking Age.

The tourists visiting Oslo do the most of these activities and experiences.



Cultural activities

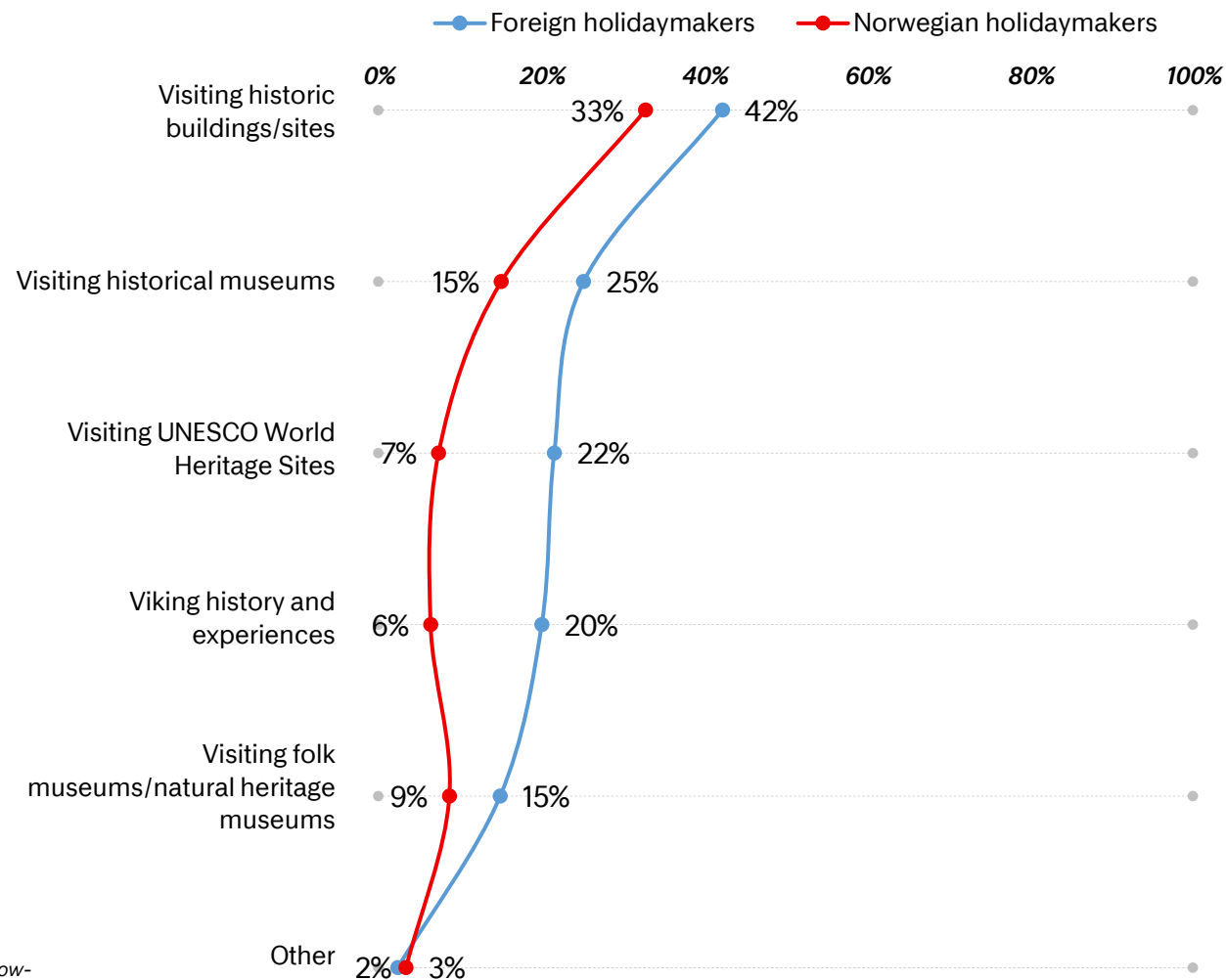


Innovasjon Norge

<sup>1</sup> Only those who have answered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. The numbers have been converted to represent the percentage of all holidaymakers. The figures in the graph to the right have been calculated as the proportion of all holidaymakers.

## Can you go into more detail regarding the historical/cultural heritage activities you have done or are planning to do?

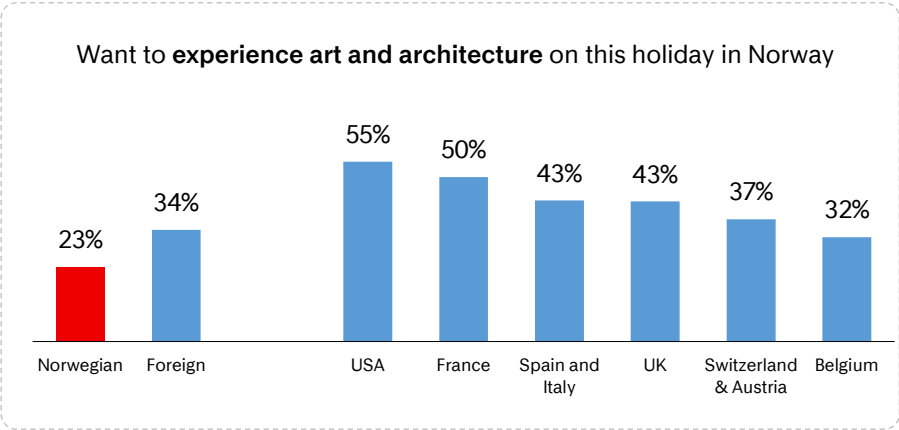
The proportion of holidaymakers who have specified the activity<sup>1</sup>



Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

Those interested in art are more likely to visit Oslo, and spend more money per day and in total on their holiday. Tourists under the age of 40 are more interested in modern art, and those over the age of 70 are more interested in art exhibitions and architecture.



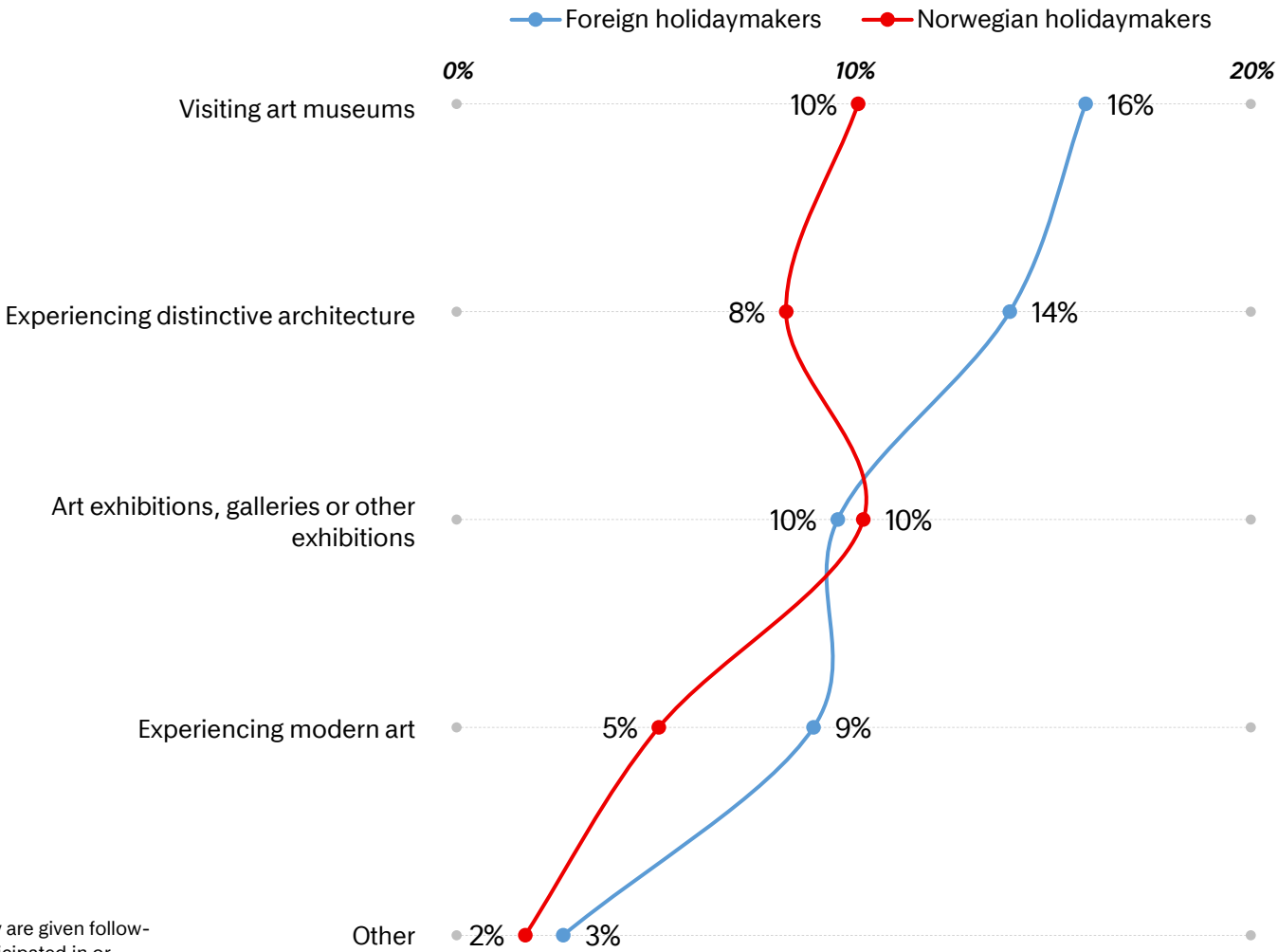
Cultural activities



<sup>1</sup>Only those who have answered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. *The numbers have been converted to represent the percentage of all holidaymakers.*  
*The figures in the graph to the right have been calculated as the proportion of all holidaymakers.*

## Can you go into more detail regarding the art/architecture activities you have done or are planning to do?

The proportion of holidaymakers who have specified the activity<sup>1</sup>

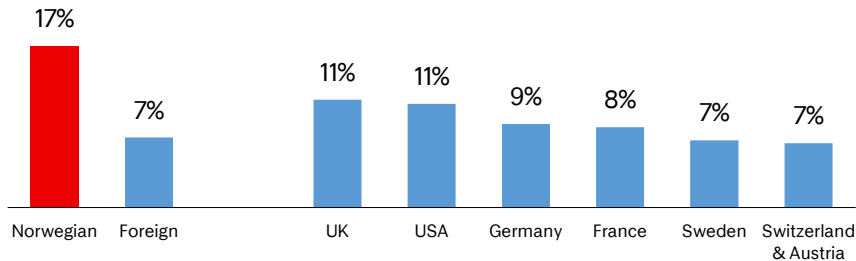


## Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

As many as 17 per cent of Norwegians plan to attend a theatre, concert, or performance during their holiday. Among foreigners, it is especially the age group between 30 and 40 that attends concerts and similar events. They are more likely to visit Oslo and Southern Norway.

Want to **experience theatre, concerts and performances** on this holiday in Norway

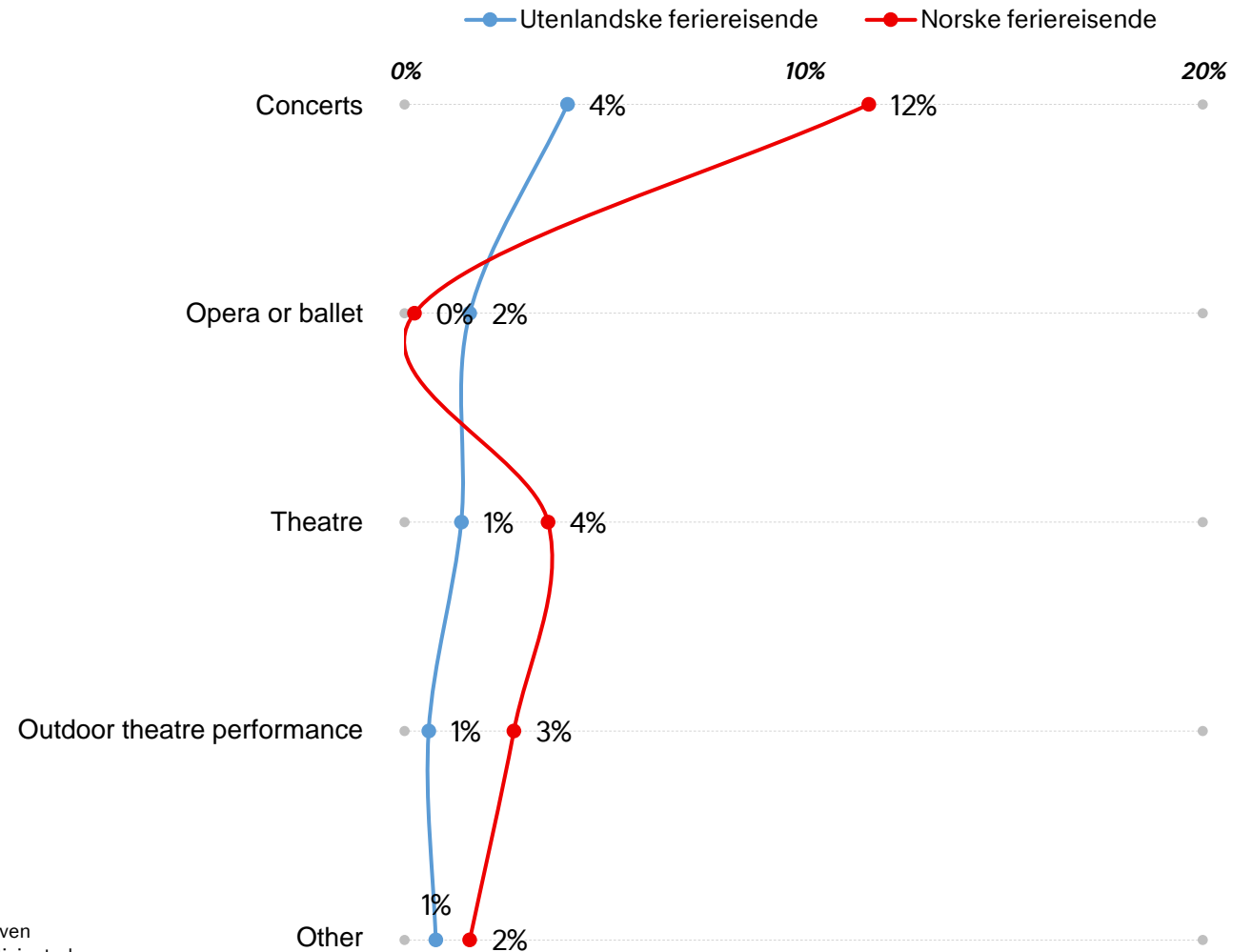


Cultural activities

<sup>1</sup>Only those who have answered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. *The numbers have been converted to represent the percentage of all holidaymakers. The figures in the graph to the right have been calculated as the proportion of all holidaymakers.*

## Can you go into more detail regarding the theatre/concert/performance activities you have done or are planning to do?

The proportion of holidaymakers who have specified the activity<sup>1</sup>

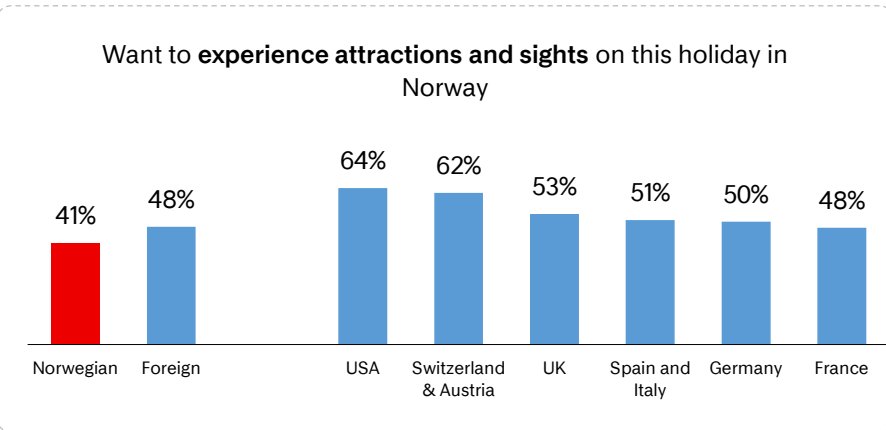




## Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

The oldest tourists are most interested in sights and cultural attractions, while the younger tourists are more interested in parks, gardens and outdoor art. Americans want to experience all these attractions, but are not that interested in street art. Street art is popular for tourists from Switzerland & Austria (23%).



Cultural activities

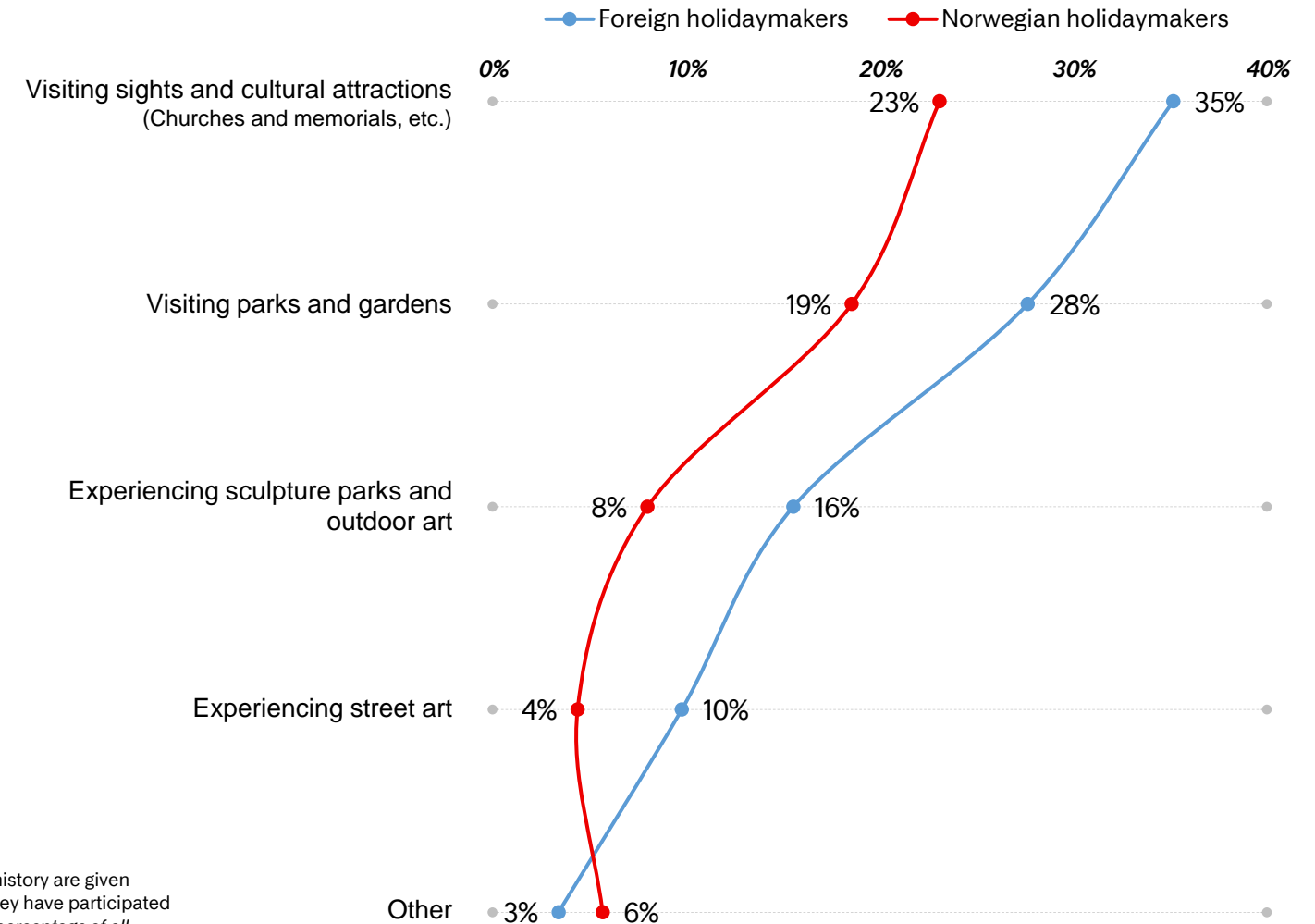


Innovasjon Norge

...ered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. The numbers have been converted to represent the percentage of all holidaymakers. The figures in the graph to the right have been calculated as the proportion of all holidaymakers.

## Can you go into more detail regarding the attractions and sights you have visited or are planning to visit?

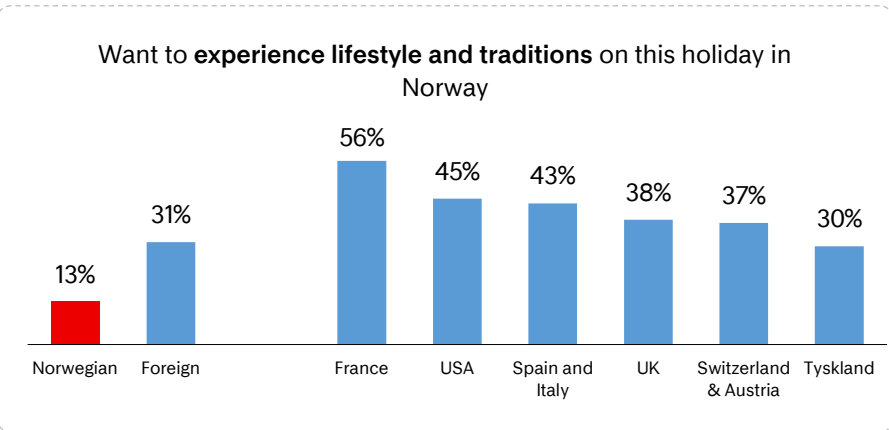
The proportion of holidaymakers who have specified the activity<sup>1</sup>



## Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

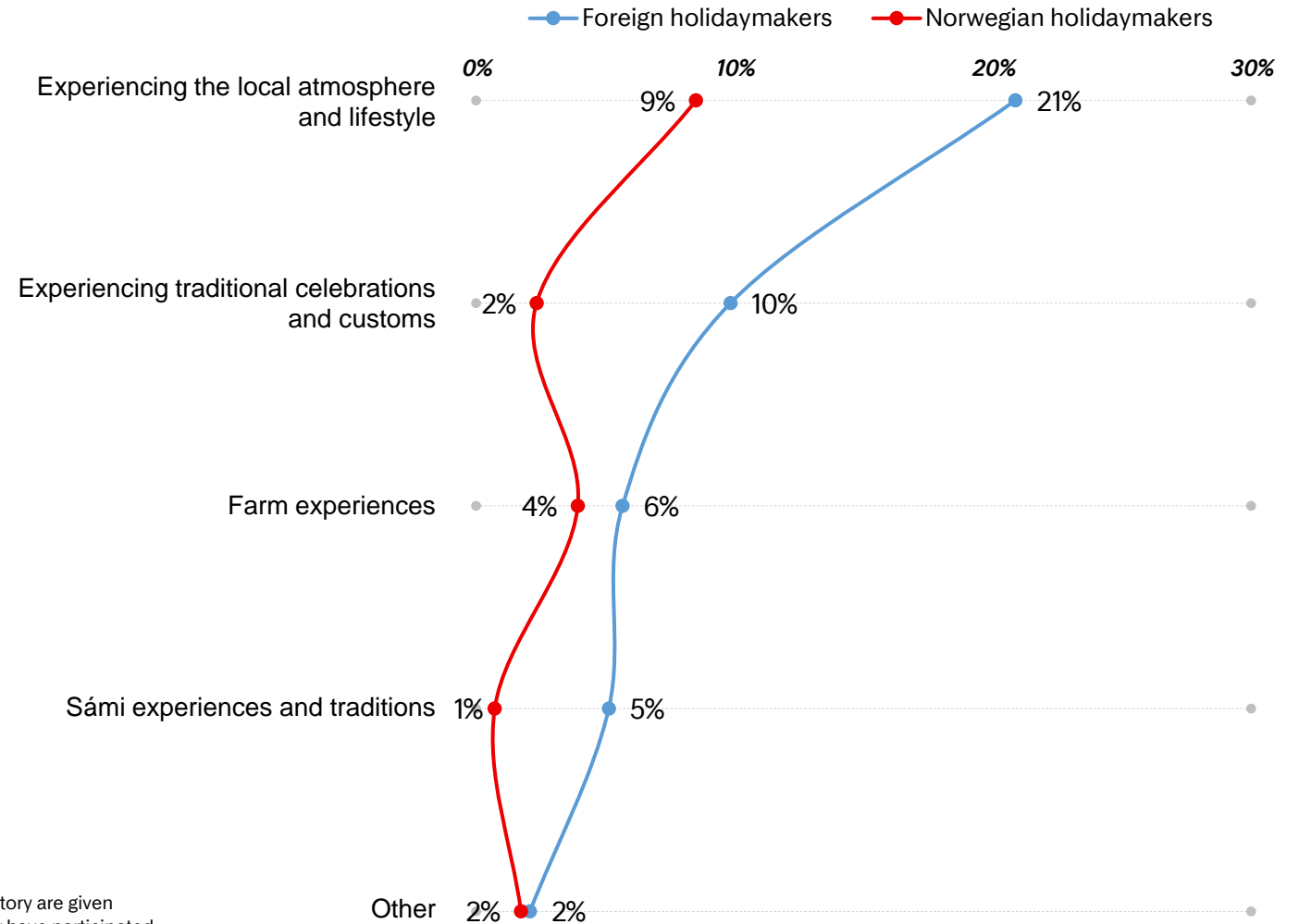
Tourists under the age of 40 are more interested in traditional celebrations and the local atmosphere, while those over 40 are a bit more interested in experiencing Sámi traditions.



Cultural activities

<sup>1</sup>Only those who have answered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. The numbers have been converted to represent the percentage of all holidaymakers. The figures in the graph to the right have been calculated as the proportion of all holidaymakers.

Can you go into more detail regarding the cultural activities you have done or are planning to do?  
The proportion of holidaymakers who have specified the activity<sup>1</sup>

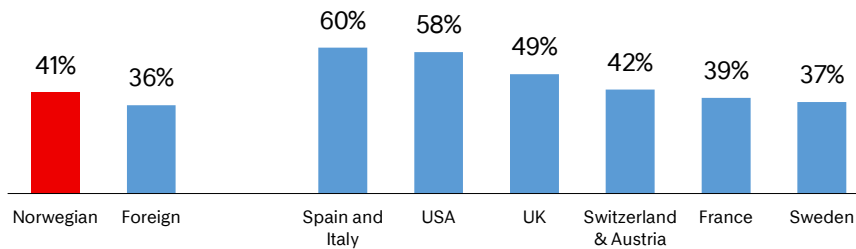


## Topic 4: Cultural and city experiences

# What type of cultural activities do summer tourists do?

Tourists in Northern Norway and Trøndelag are most interested in experiencing food culture, while in Oslo, most are interested in visiting a specific restaurant and exploring food markets. Those under the age of 50 are most interested in culinary experiences. Tourists in Northern Norway are most interested in experiencing a special dish. Tourists from Spain & Italy are most interested in culinary experiences on their holiday in Norway.

Want to have **culinary experiences** on this holiday in Norway

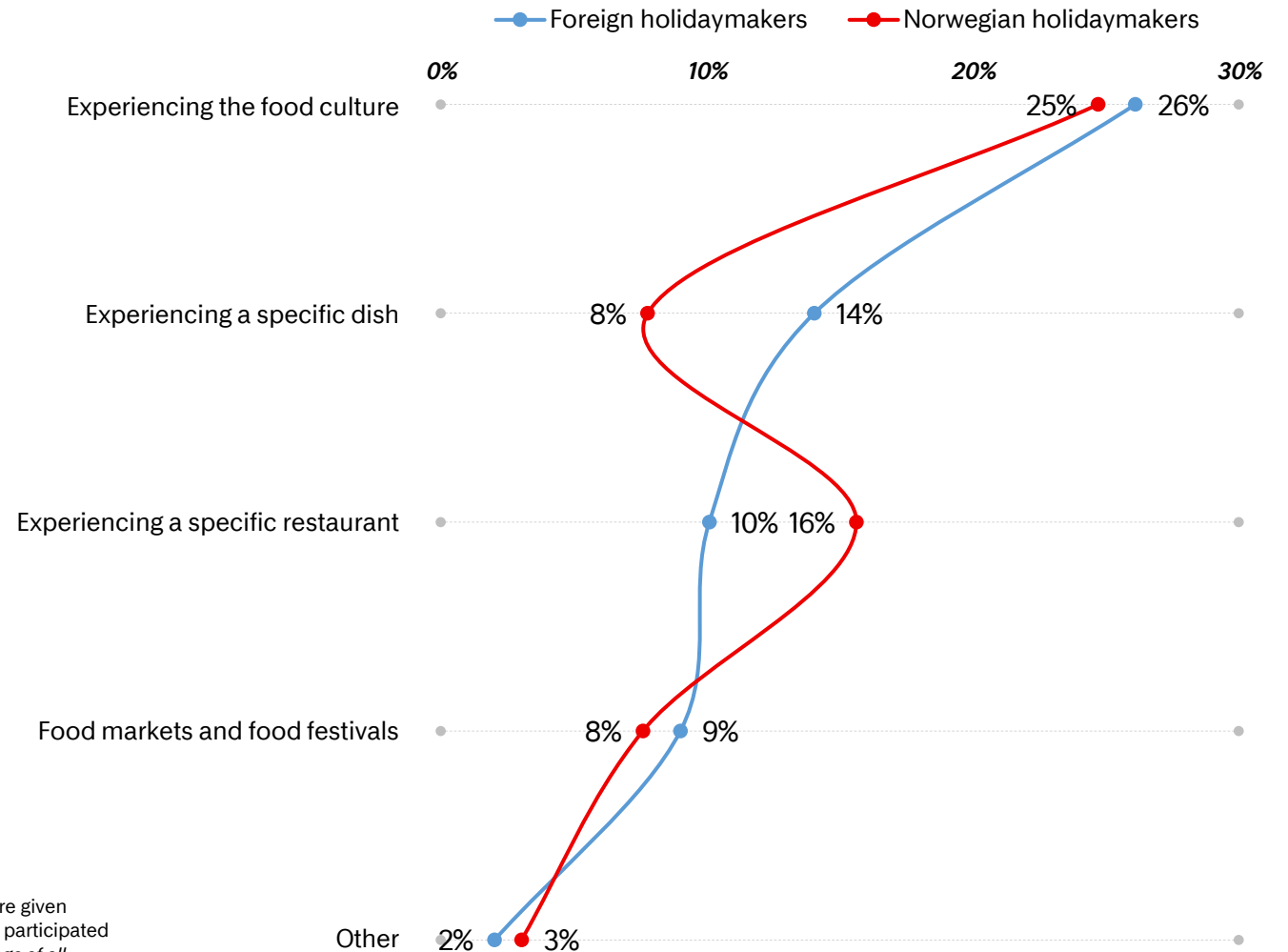


Cultural activities

ered that they want to experience culture, art and history are given follow-up questions encouraging them to elaborate on the cultural activities they have participated in or want to participate in. The numbers have been converted to represent the percentage of all holidaymakers. The figures in the graph to the right have been calculated as the proportion of all holidaymakers.

## Can you go into more detail regarding the culinary experiences you have had or are planning to have?

The proportion of holidaymakers who have specified the activity<sup>1</sup>



## Topic 4: Cultural and city experiences

# What other activities do summer tourists do?

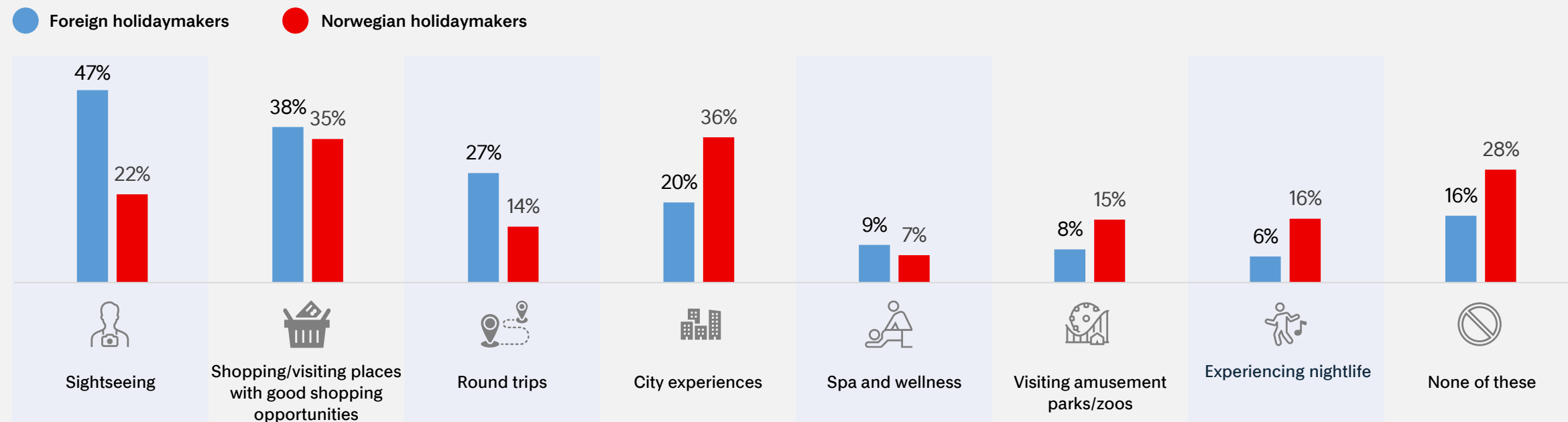


Other activities

Round-trip tourists are most interested in sightseeing, Asians appreciate good shopping opportunities, and 1 in 5 French tourists seeks spa and wellness experiences. Spa and wellness are most in demand among the 30–40 age group. The youngest are most interested in nightlife, and those between the ages of 60 and 70 would like to go sightseeing. The majority of tourists over 60 years old are on a round trip.

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

The proportion of holidaymakers who have specified the activity





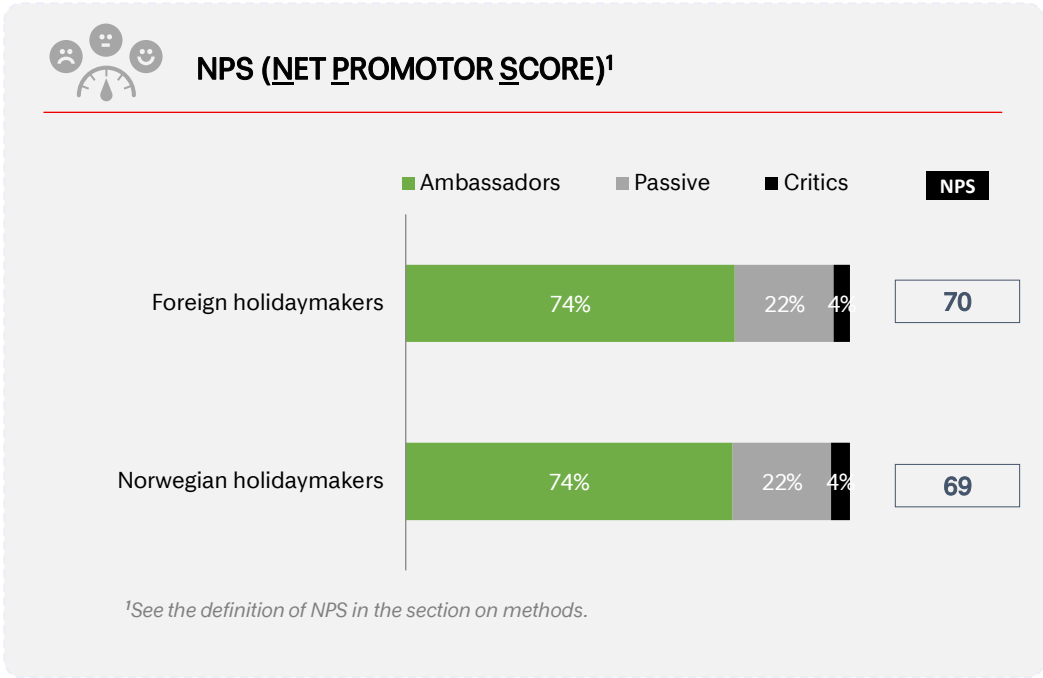
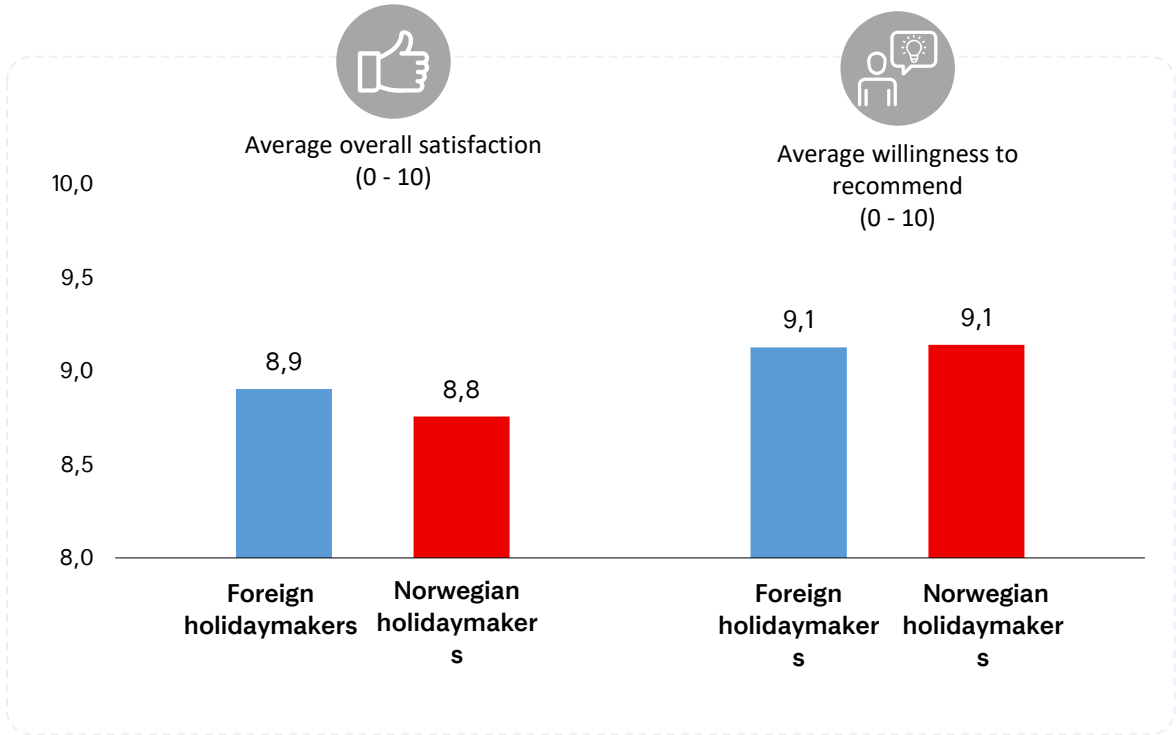
## Topic 5: **Satisfaction and willingness to recommend**

Where do the most satisfied tourists come from? What are the critics dissatisfied with? What characterises those who recommend Norway as a travel destination to others?



The tourists are very satisfied and are happy to recommend Norway as a travel destination to others.

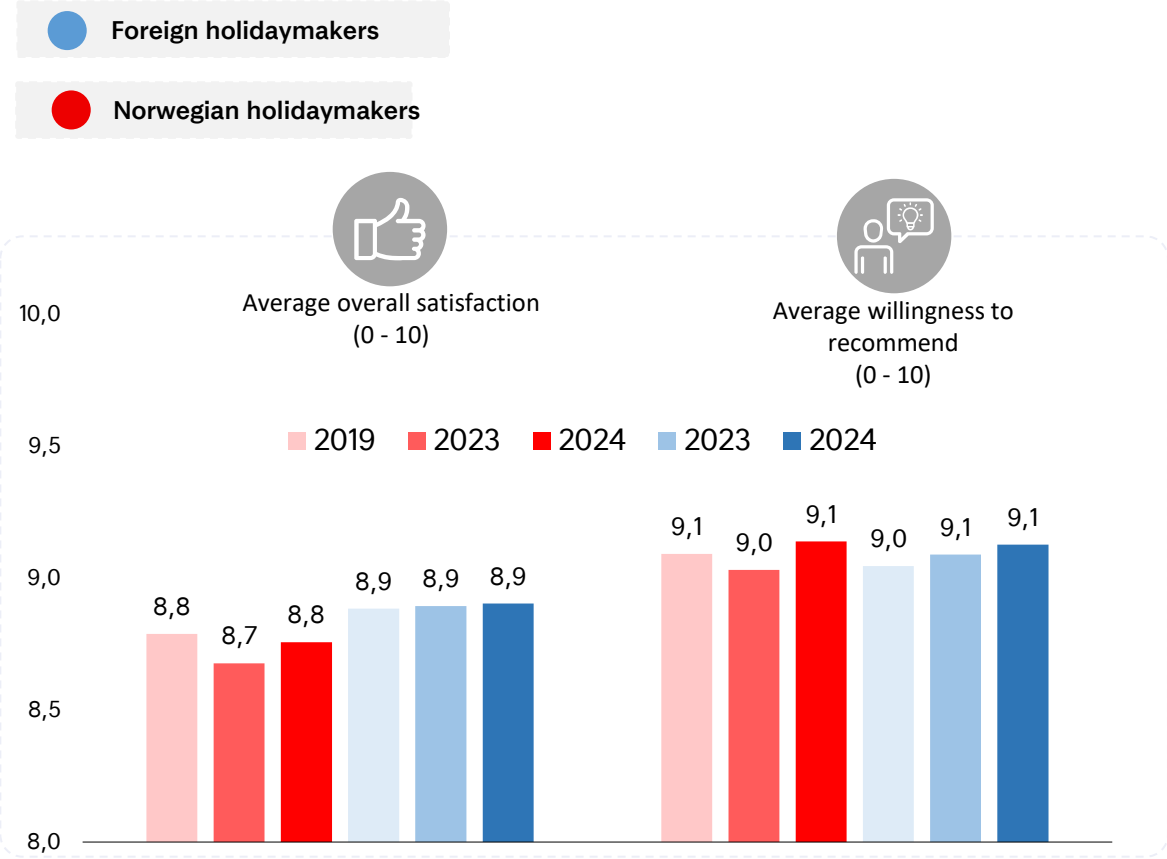
Satisfaction and willingness to recommend are highest among those who don't spend much money. Those who spend more than NOK 3000 per day have an NPS of 66. Tourists under the age of 40 lower the NPS. Tourists interested in culture, history and culinary experiences have higher NPS (75). The same applies to those who have participated in organised trips in nature (74).



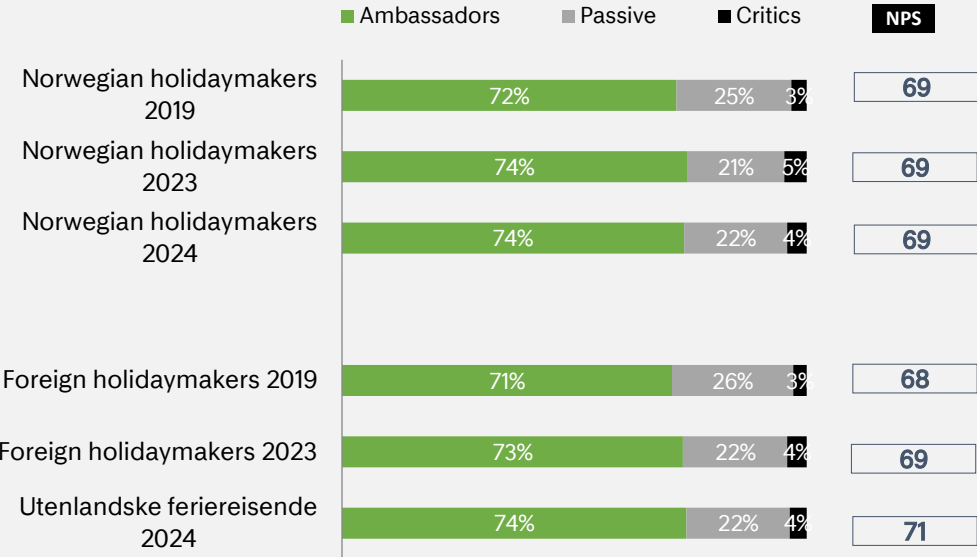
Topic 5: Satisfaction and willingness to recommend

The tourists are very satisfied and are happy to recommend Norway as a travel destination to others.

Satisfaction and willingness to recommend are at approximately the same level as before the pandemic. NPS has increased slightly this summer season, but overall satisfaction regarding holidays in Norway remains completely stable at a very high level.



NPS (NET PROMOTOR SCORE)<sup>1</sup>



<sup>1</sup>See the definition of NPS in the section on methods.

Topic 5: Satisfaction and willingness to recommend

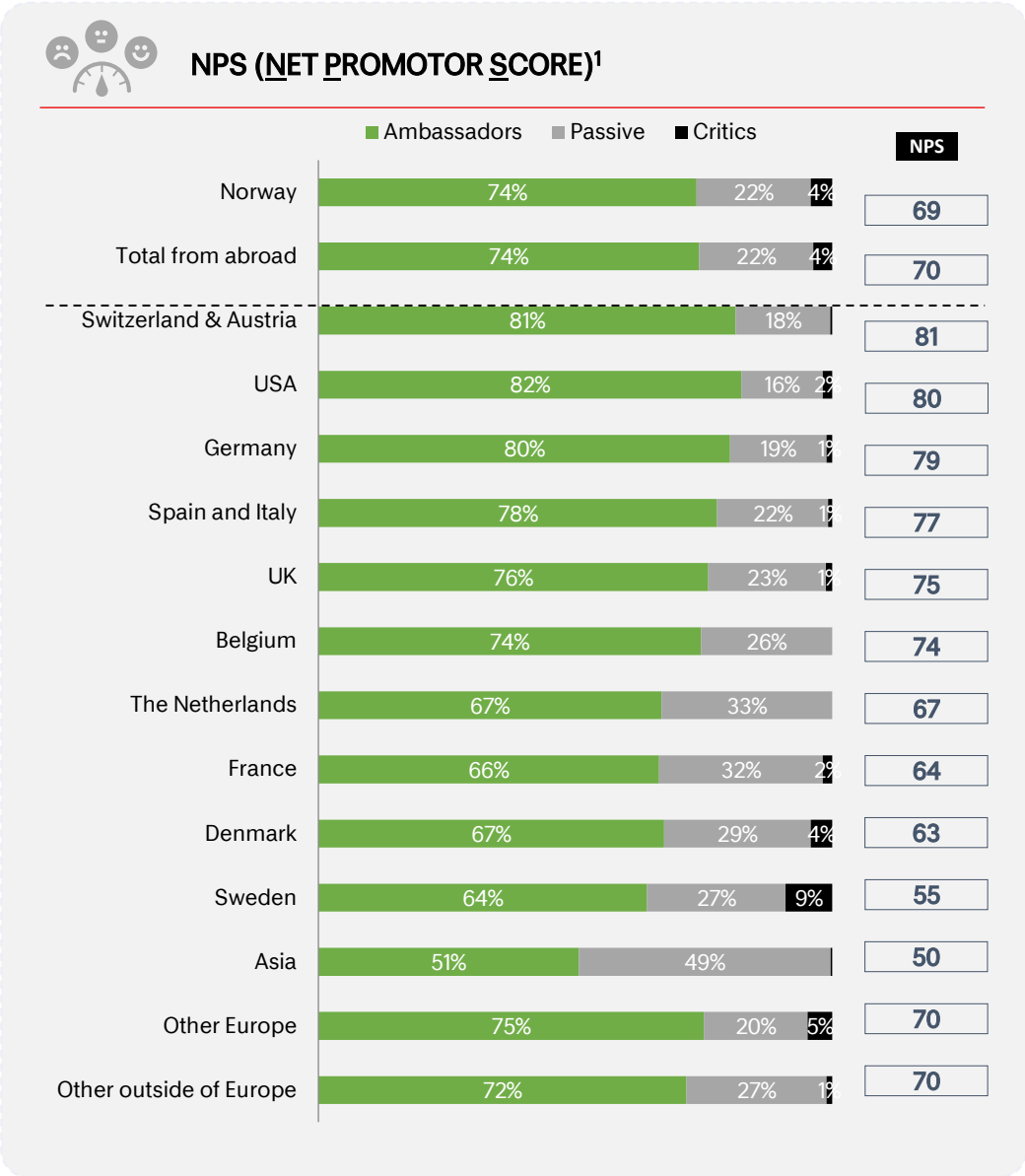
# The vast majority are happy to recommend Norway as a travel destination

More than half of the tourists, both from Norway (58%) and abroad (56%), rate 10 out of 10 when asked if they would recommend Norway as a travel destination to others. Few are directly critical (rating 0-6), except for the Swedes. Most of those who lower the NPS are passive – neither critical nor enthusiastic.

Tourists from the USA and the UK are the most satisfied with their holiday in Norway.

**NPS Definition**

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



56

Topic 5: Satisfaction and willingness to recommend

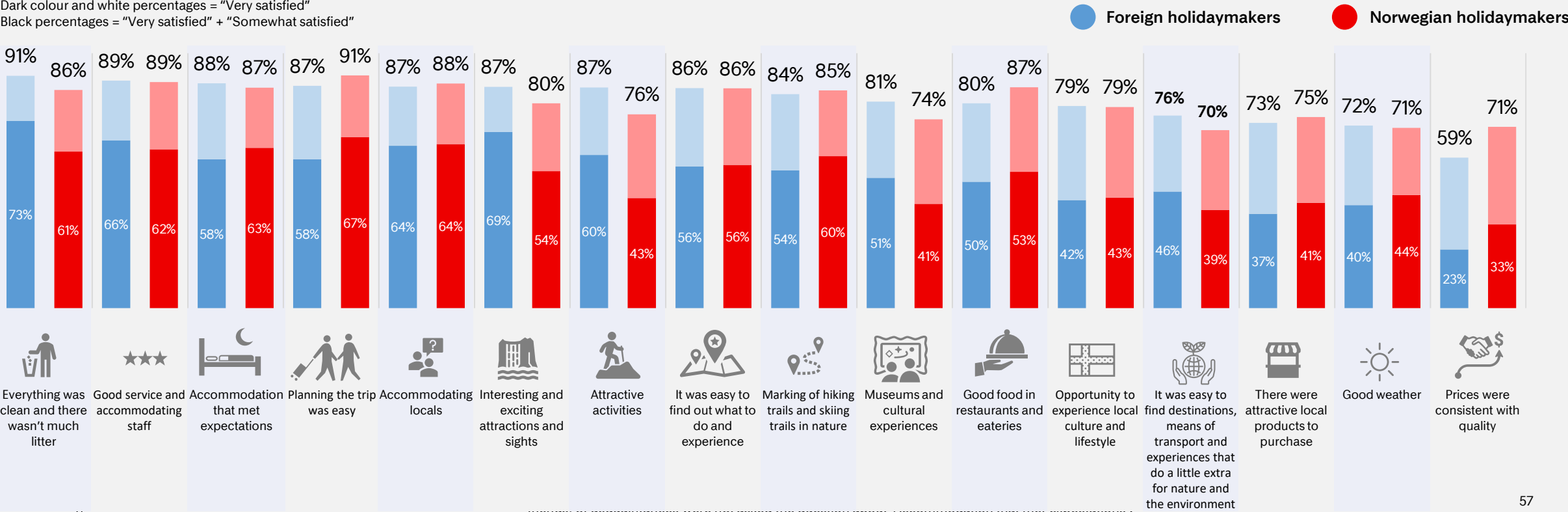
# Most satisfied with the accommodation, hospitality and service

For most measured parameters, more than half of respondents say they are very satisfied with their experience in Norway, but there are a few points that bring the score down slightly. These points include 'prices were consistent with quality', 'attractive local products to purchase', 'opportunity to experience local culture and lifestyle', and 'it was easy to find destinations etc. that do a little extra for nature and the environment'. Here, less than 50 per cent of foreign tourists responded 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 5: Satisfaction and willingness to recommend

# Foreign tourists are less satisfied with price and quality in 2024

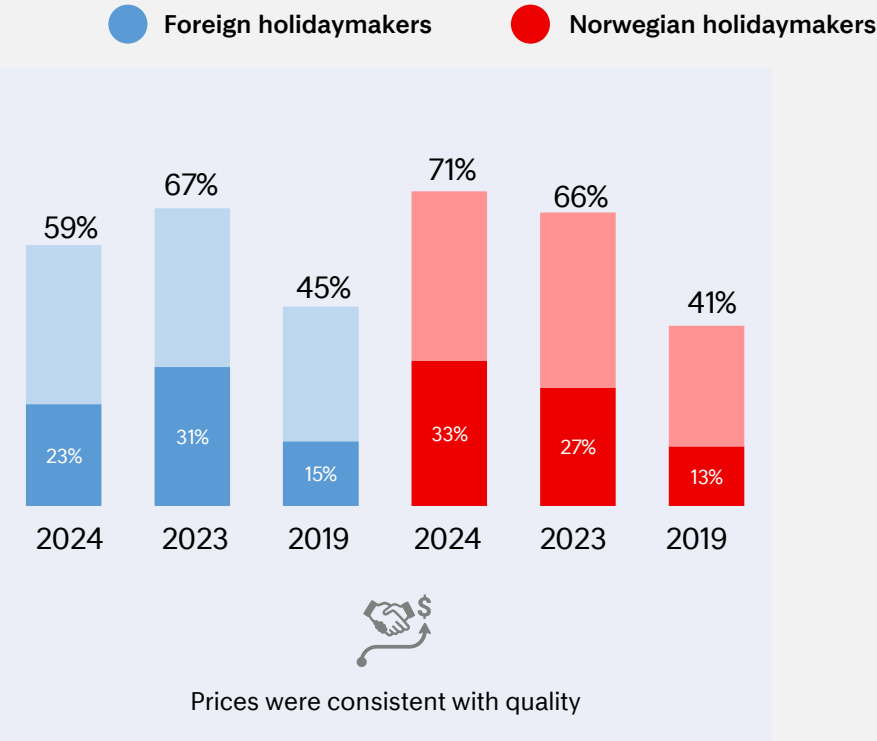
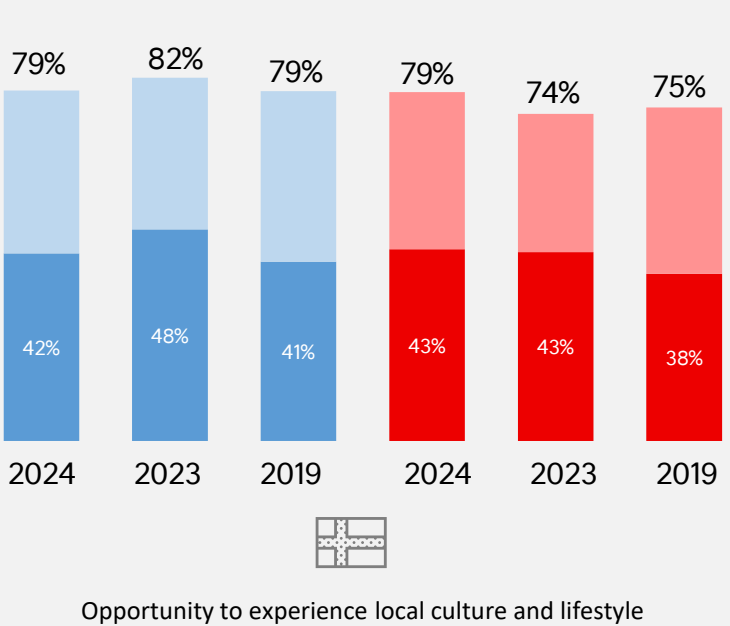
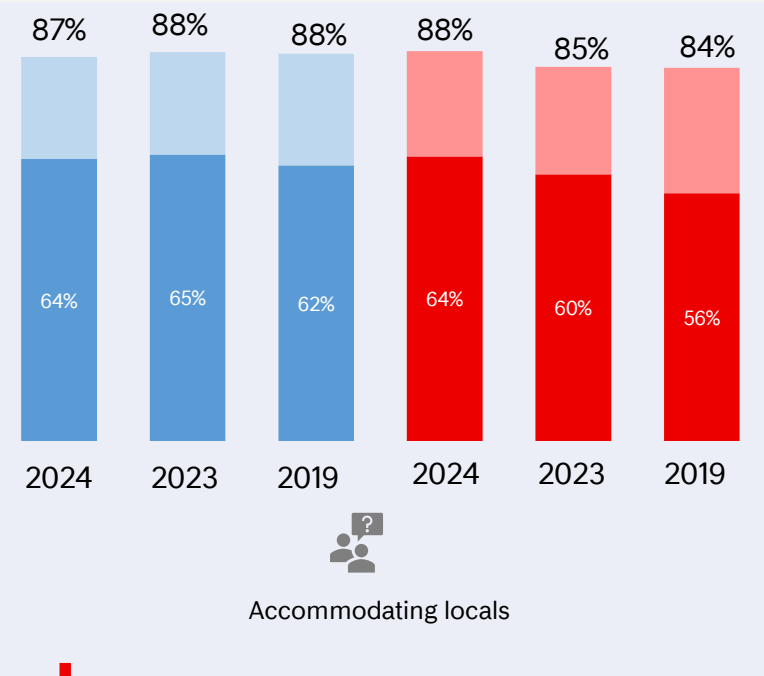
Satisfaction with 'prices were consistent with quality' has declined somewhat compared to the summer of 2023. Americans (42%) and Danes (41%) are least satisfied.

The tourists who were actively interested in experiencing local culture and lifestyle are neither more nor less satisfied than the average with the opportunities to do so during their holiday in Norway. Among the foreign tourists, those visiting Southern Norway are the most satisfied with the opportunities to experience local culture and lifestyle, as well as with the accommodating locals.

## 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"



NB: Tourists who have answered "Not relevant" have been excluded from the calculations. Those who have only stated that they stayed with family, friends, or acquaintances were not asked the question about 'Accommodation that met expectations'.



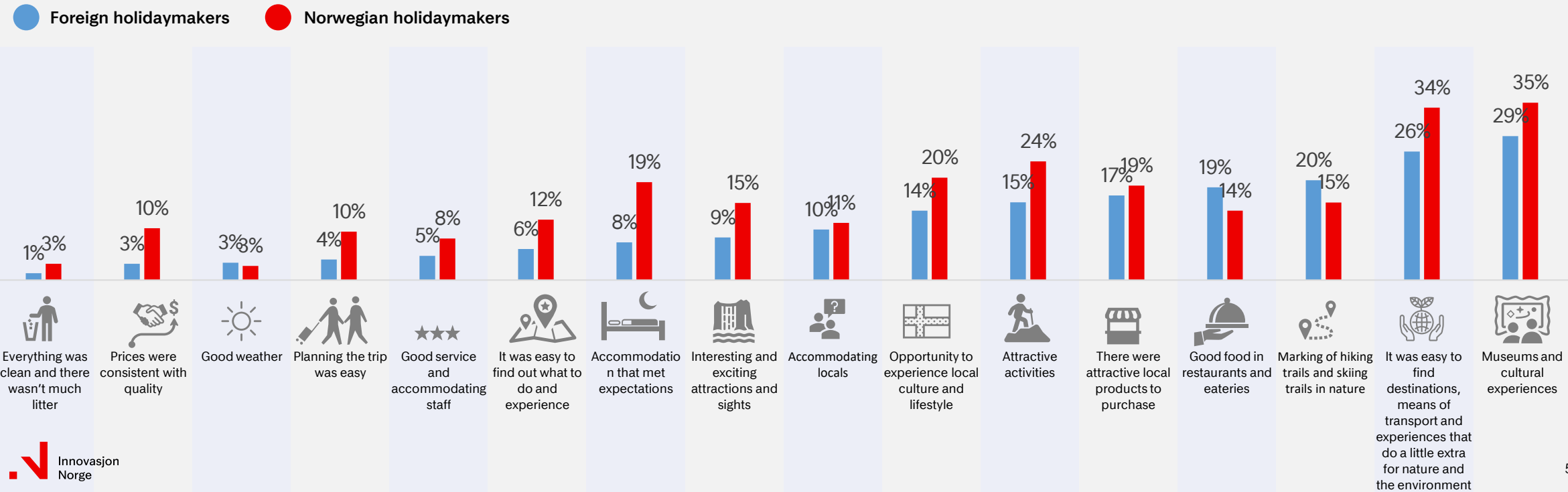
Topic 5: Satisfaction and willingness to recommend

# Museums and cultural experiences are ‘not relevant’ for 1 in 3 tourists

29 per cent of foreign tourists respond ‘not relevant’ when asked about their satisfaction with museums and cultural experiences. As many as 1 in 5 also respond that satisfaction with the food at restaurants/dining establishments is not relevant on their holiday. It is especially Germans and Dutch tourists in general, and campervan tourists in particular, who experience that restaurant food and museums are irrelevant on their holiday.

How satisfied or dissatisfied are you with the following?

The proportion of “Not relevant”.



NB: Tourists who have only stated that they stayed with family, friends, or acquaintances were not asked the question about ‘Accommodation that met expectations’.

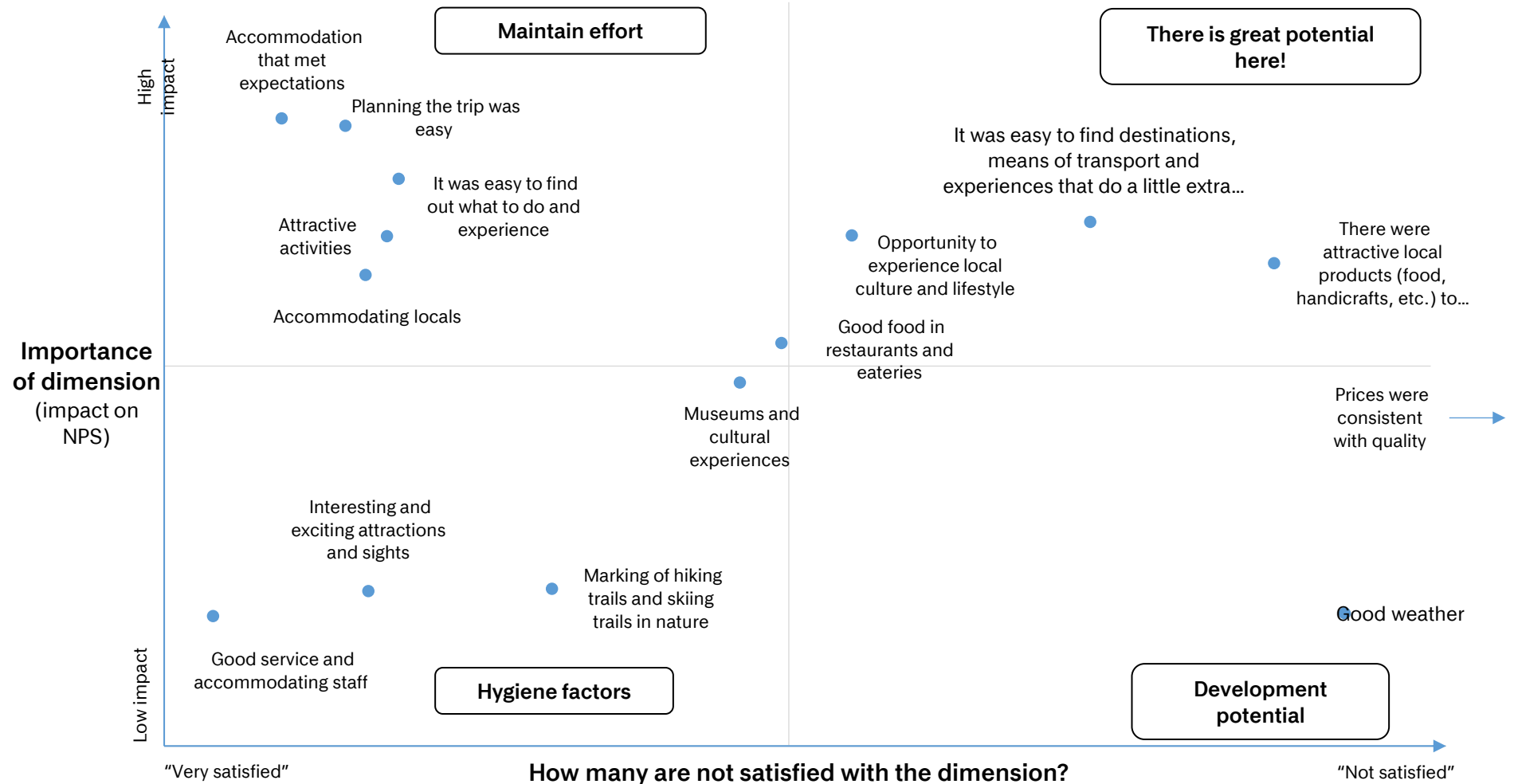
## Topic 5: Satisfaction and willingness to recommend

# Room to increase NPS by focusing more on local culture and products.

The potential map shows which areas tourists are most and least satisfied with and the impact that increased satisfaction would have on their willingness to recommend/NPS.

To increase NPS, the greatest impact comes from addressing the areas located in the upper right corner of the map. This is where the most tourists are currently dissatisfied, and improving their experience from passive/critical to satisfied would have a significant impact on NPS.

Prices consistent with quality have a significant impact, but it is worth noting that there is potential for improvement in offering more attractive local products, nature and environment experiences, and local culture and lifestyle.



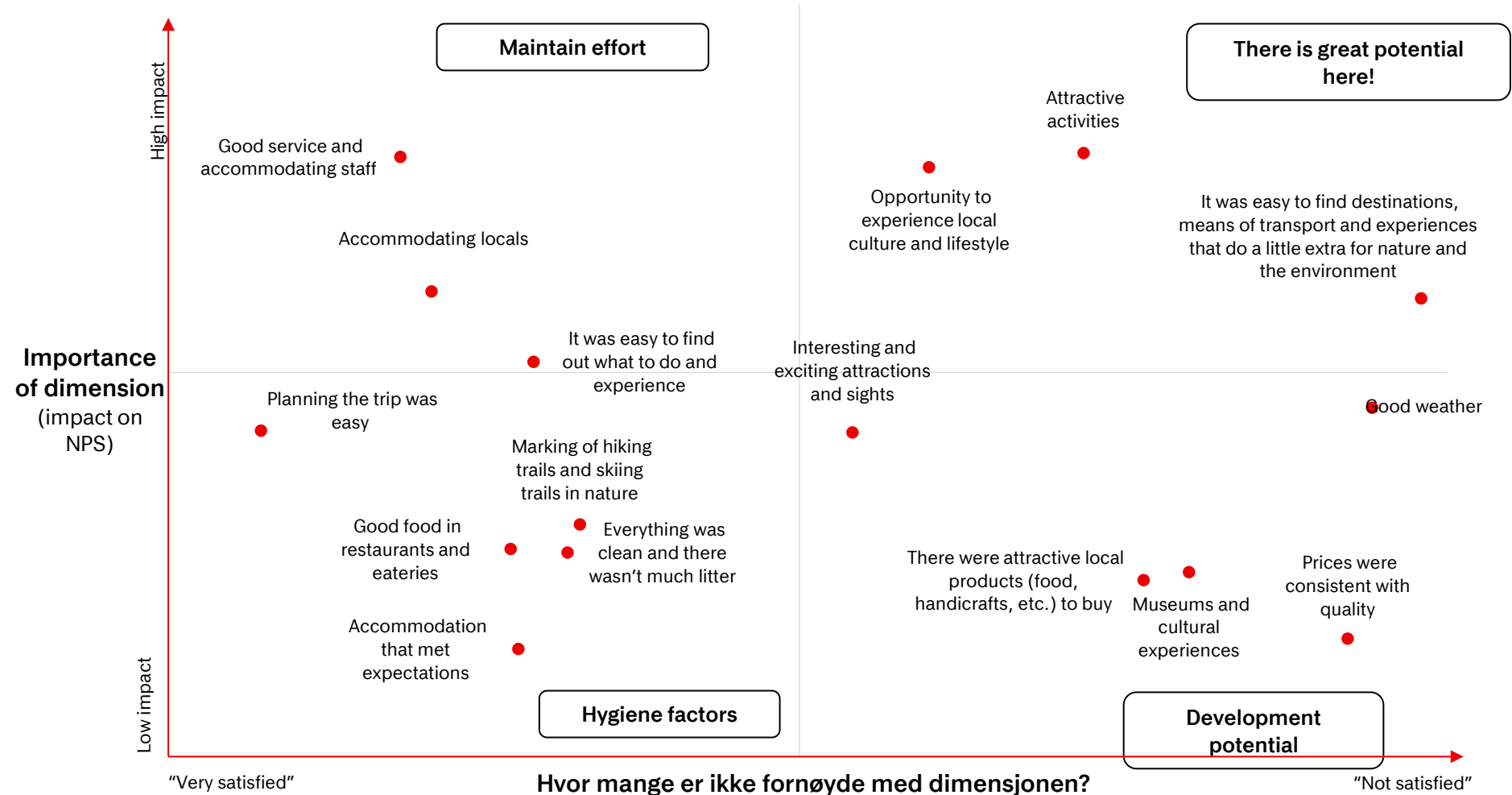
## Topic 5: Satisfaction and willingness to recommend

# An attractive range of activities is important for increasing Norwegians' willingness to recommend.

The potential map shows which areas tourists are most and least satisfied with and the impact that increased satisfaction would have on their willingness to recommend/NPS.

To increase NPS, the greatest impact comes from addressing the areas located in the upper right corner of the map. This is where the most tourists are currently dissatisfied, and improving their experience from passive/critical to satisfied would have a significant impact on NPS.

24 per cent of Norwegians are less satisfied with the range of activities on their holiday, and 21 per cent are less satisfied with the opportunities to experience local culture and lifestyle. Local culture and lifestyle will boost NPS for both Norwegians and foreign tourists.



**Norwegian holidaymakers**





Photo: Matias Fosso - Visit Norway

## Topic 6: **The importance of sustainability**

Do tourists consider the environment, climate, and nature when planning their holiday? What do they do in order to travel sustainably in Norway?

## Topic 6: The importance of sustainability

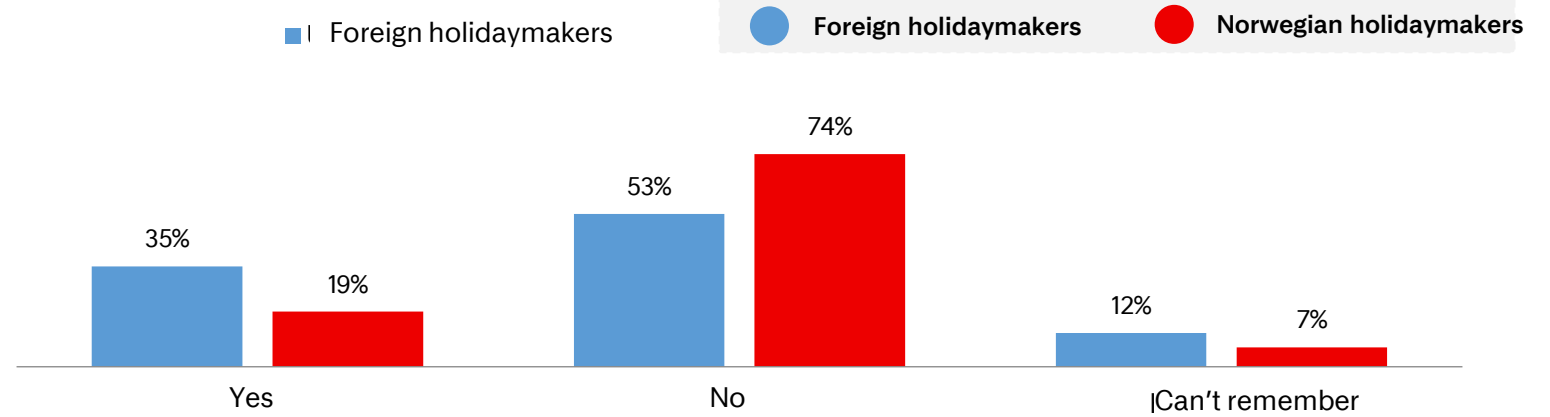
# 1 in 3 foreigners take nature and climate into consideration when planning their holiday

1 in 3 foreign visitors are concerned about sustainability when planning their holiday.

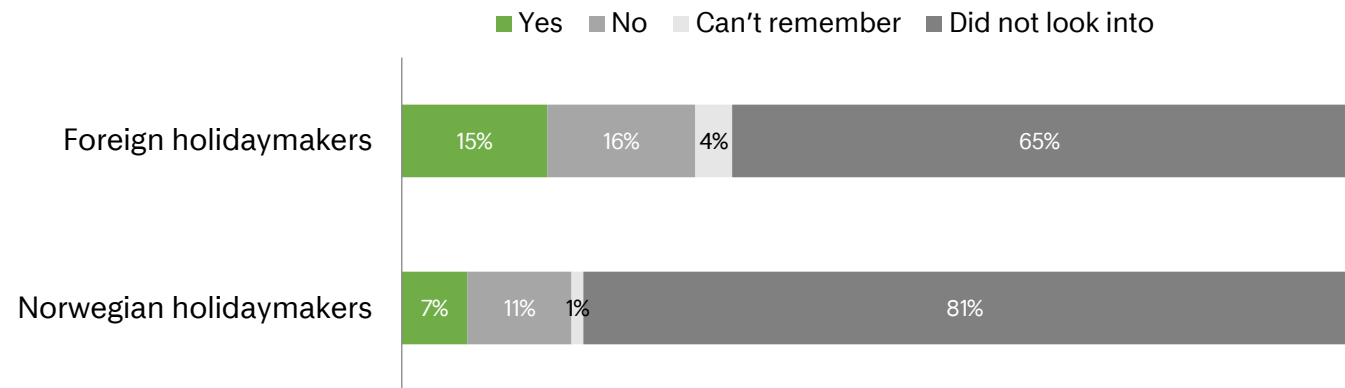
There are significant differences between the markets. Norwegians are less likely to look into whether destinations take care of nature or are climate-friendly when planning a holiday in Norway.

Approximately half of the foreign tourists who took nature and climate into consideration when planning their trip have ruled out certain destinations or experiences during the planning process.

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?





Topic 6: The importance of sustainability

# Tourists from Southern Europe are the most concerned about nature and climate

1 in 3 foreign visitors are concerned about sustainability when planning their holiday. Almost half of the tourists who looked into sustainability while planning their trip have ruled out certain destinations, modes of transport, and/or experiences out of consideration for nature and/or climate.

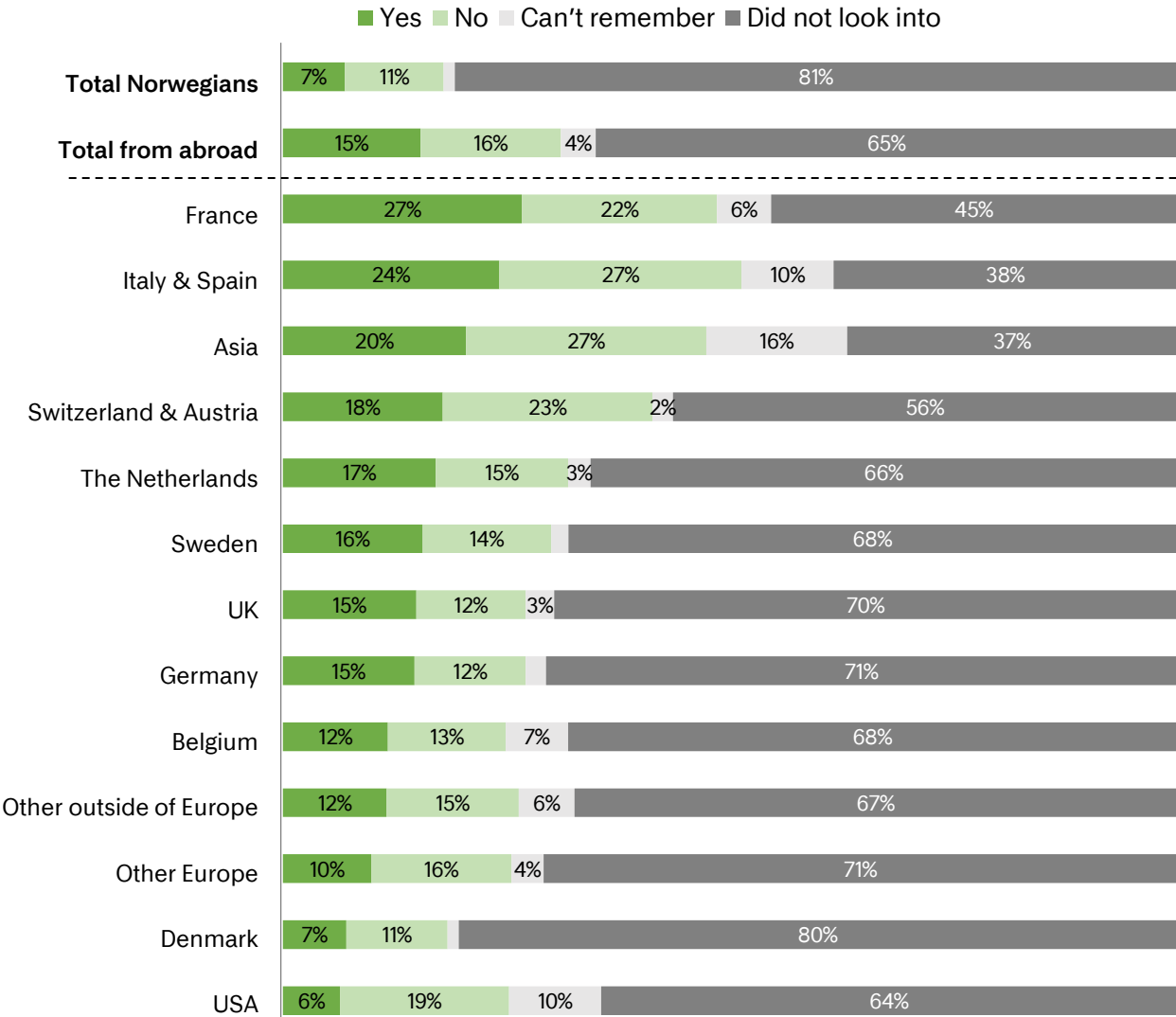
Approximately half of the tourists from France (49%) and Italy & Spain (51%) take nature and climate into consideration when planning their trip, and half of them choose to avoid certain providers/operators.

Danes and Americans are the least concerned about nature and the environment when travelling, but the few who prioritise sustainable travel are more likely to avoid providers/operators that do not take care of nature and/or climate.



NB: 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.

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?



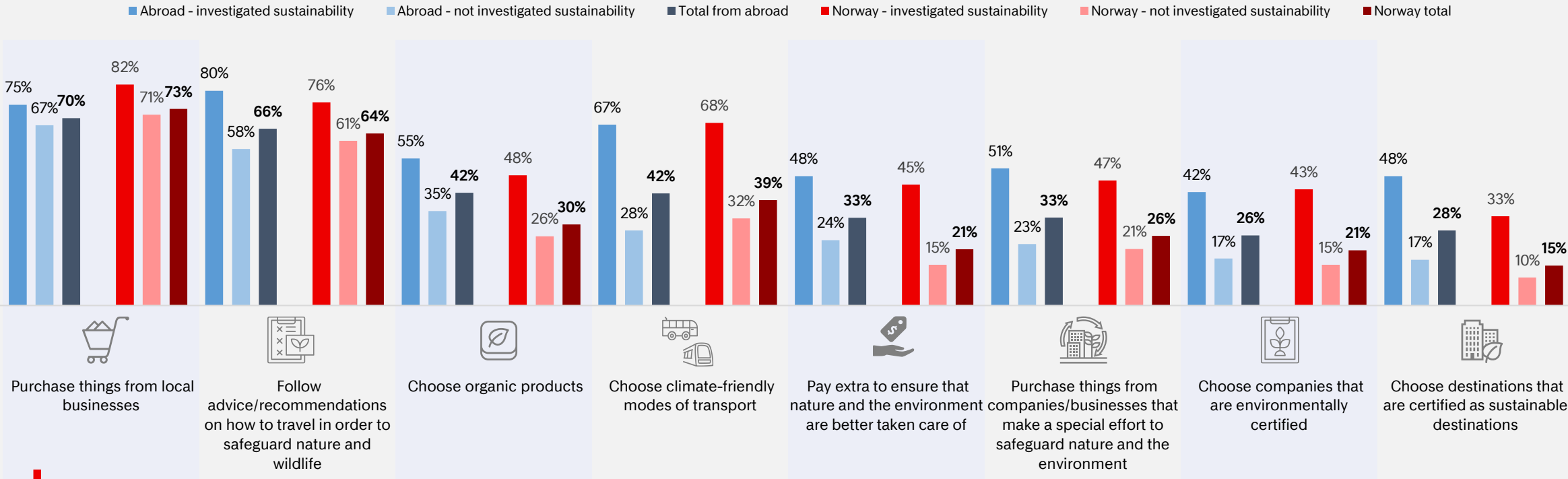
Topic 6: The importance of sustainability

Only 1 in 5 Norwegians will pay extra to safeguard nature and the environment

The tourists who took nature and climate in to consideration when planning their trip are more likely to make sustainable choices during their holiday in Norway. More than 7 out of 10 tourists prefer to shop from local businesses. 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. As many as 1 in 3 foreign tourists are willing to pay more to ensure that nature and the environment are better taken care of.

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





# Appendix:

## **Source data, methodology and definitions**

## Definition of terms

Terms	Definition
<b>Tourist</b>	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).
<b>Holidaymaker</b>	A tourist who has made a trip where the main purpose is specified as being a leisure trip.
<b>Financial travel companions</b>	Financial travel companions means individuals who travel together and share their travel expenses.
<b>Travel companions</b>	Travel companions means individuals who travel together.
<b>Other expenditure</b>	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.
<b>Package holidays</b>	A holiday purchased as a package trip from one provider/operator, i.e. a package which includes at least two of the following services: transport, overnight accommodation, two or more meals per day, activities/excursions.
<b>NPS</b>	<u>Net Promoter Score</u> (NPS) is a tool for measuring loyalty and, in this context, it specifies the percentage of tourists who would recommend Norway 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. $NPS = \% \text{ ambassadors} - \% \text{ critics}$ .



# Source data and methodology

This report shows findings from the Tourist Survey based on interviews with holidaymakers in Norway during the 2024 summer season. The table on the right shows the number of answers from Norwegian and foreign holidaymakers. The interviews were conducted by Norstat between May and August 2024. The sampling plan is designed based on Statistics Norway’s accommodation statistics. Tourists were interviewed at a number of different attractions, overnight accommodation, airports, ports, etc. Respondents who stated that they have stayed in Norway for more than six months are not included in the analysis. Overnight stays at hotels, campsites, or cabin villages (registered accommodation types) are weighted based on accommodation levels, with a weighting calculated on the basis of hotel, campsite, and cabin village overnight stays in the accommodation statistics from Statistics Norway (SSB). Overnight stays at other types of accommodation (unregistered types of accommodation) are weighted based on the distribution in the source data and the overall distribution of registered overnight stays from Statistics Norway and Hurtigruten.

The weighting works in such a way that each individual respondent is weighted to represent a proportion of the population. The weighted respondents therefore represent the total population. In order to avoid certain respondents from having an disproportionately large impact, the maximum weighting has been trimmed, ensuring that no respondent can have an excessively high weight. In this way, guests with many overnight stays are given more weight than guests with fewer overnight stays, without allowing individual guests to disproportionately impact the averages.

Number of interviews with tourists who stayed overnight in Norway during the summer season of 2024.

	Holidaymakers		Total
	Norwegian	Foreign	
Number of interviews 2024	1549	3934	5483
Number of interviews 2023	1022	7021	8043
Number of interviews 2019	1117	4181	5265



## Innovation Norway

Tel: (+47) 22 00 25 00  
Postboks 448 Sentrum,  
0104 Oslo  
Grev Wedels plass 9,  
0151 Oslo

[www.innovasjon norge.no](http://www.innovasjon norge.no)

## Epinion

Ryesgade 3F  
2200 Copenhagen N  
Denmark  
T: (+45) 87 30 95 00  
E: [copenhagen@epinionglobal.com](mailto:copenhagen@epinionglobal.com)  
[www.epinionglobal.com](http://www.epinionglobal.com)

## Gyger

Sigrid Oterholm Hoem

T: (+47) 90 78 77 80  
E: [sigrid@gyger.no](mailto:sigrid@gyger.no)

