

Key Figures for Norwegian Travel and Tourism

2024



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01

Introduction and Key Figures



Tourism Year 2024

'A year characterised by growth and equal seasonal distribution'

2024 was a year characterised by good growth measured by the number of overnight stays and tourism expenditure. According to estimates, 103.9 million overnight stays were recorded alongside a total expenditure of NOK 145.5 billion from Norwegian and foreign holidaymakers and business travellers. As in previous years, the majority of this growth was driven by holidaymakers. Cruise tourism has also been significant, with figures from the Norwegian Coastal Administration showing that 1.5 million international cruise tourists visited Norway. With an average of four port calls per tourist, this amounts to around 5.9 million cruise overnight stays along the Norwegian coast. Norway's share of global cruise tourism constituted 4.3 per cent, while the share of land-based international tourism has remained stable at 0.5 per cent over a number of years.

2024 was the year of recovery for international tourism

While 2023 was the year that Norwegian tourism returned to pre-pandemic levels, 2024 was the year of recovery for international tourism and was only one per cent below the peak of 2019. However, there are regional variations. While arrivals to European countries were one per cent higher, arrivals to Asia were one per cent lower. The same goes for departures from Asia.

This development is also reflected in the figures for Norway. The United States is the only overseas market that has seen growth in the number of overnight stays compared to 2019. The increase from the United States has been so great that it is now Norway's second largest foreign market, beaten only by Germany – which remains the largest both in the number of overnight stays and financial contribution.

Major growth in overnight stays outside of official statistics

Estimates on the number of overnight stays include all overnight stays that are part of the official Statistics



Good growth across the year

Norway has seen consecutive monthly growth from abroad since April 2023 and strong growth outside of the high season. This development has contributed to the share of foreign commercial overnight stays in the summer season going down from 60 per cent in 2019 to 55 per cent in 2024.

Norway data, data from Hurtigruten and Havila, and all other overnight stays outside of official statistics.

These are covered in the Tourism Survey. The basic data for the Tourism Survey 2024, like 2023, shows a significant increase in the number of foreign tourists staying in campervans or tents, both at and outside of campsites, as well as a larger proportion spending the night in privately rented homes and cabins. However, the proportion of overnight stays in hotels has decreased slightly. This is because the average length of stay is significantly longer for those staying in private accommodation and/or travelling in a campervan than those on a hotel holiday.

This also means that 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. This is primarily due to the fact that a greater proportion of tourists come to Norway from Germany, the Netherlands, Belgium, Switzerland and Austria using their own car, and a smaller proportion are arriving from Asia and countries outside of Europe. The vast majority are satisfied with their holiday in Norway and are happy to recommend Norway as a destination to others.

Norwegians continue explore their own country as a holiday destination

Since the pandemic, the tourism industry in many countries has experienced a major growth in domestic travel – and Norway is no exception. According to Statistics Norway’s Tourism Survey, 2021 was, perhaps not surprisingly, a record year with the highest number of holidays in Norway ever recorded by Norwegians, and this trend is continuing. In 2024, Norwegians had a total of 19.8 million domestic trips – an increase from both the record year of 2021 and a whole 8.7 million more than 2019. And for the second year in a row in a normal year, Norwegians spent over half of their total holiday consumption on domestic holidays.

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

The Competition Price Index, which measures Norway’s competitiveness, has increased from 114

in 2019 to 131 in 2024. This represents a growth of 15 per cent. This means that it is far more expensive for Norwegians to go on holidays abroad, while foreign visitors get more for their money.

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

According to the Tourism Survey, 46 per cent of holidaymakers in 2024 were first-time visitors, and among Northern Lights tourists, a total of 62 per cent were in Norway for the first time. Experiencing the Northern Lights is a ‘once in a lifetime experience’ for many. At the other end of the scale, we have ski tourists who come year after year, and only three per cent of Swedish ski tourists were in Norway for the first time.

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



Margrethe Helgebostad
Special Advisor for Tourism/Oslo

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Further information and more reports can be found on Innovation Norway’s website for tourism:

https://

reiseliv.innovasjon Norge.no/

https://

reiseliv.innovasjon Norge.no/artikkel/reports

Key Figures

	2019	2020	2021	2022	2023	2024	Change over the most recent period:
Employed persons in the tourism industry							
Proportion employed in the tourism industry	220,100	198,400	191,400	n/a	n/a	n/a	-4%
Tourist consumption in Norway by consumer group (current prices). Figures in billions							
Total consumption	194.3	129.8	147.8	n/a	n/a	n/a	14%
Foreign tourist consumption in Norway	59.4	19.0	18.7	n/a	n/a	n/a	-2%
Norwegian domestic tourist consumption in Norway	108	96	114	n/a	n/a	n/a	19%
Norwegian industries' expenses for business travel in Norway	27.3	14.7	15.0	n/a	n/a	n/a	3%
The tourism industry's share of GDP	4.2%	3%	3%	n/a	n/a	n/a	0%
Total tourism consumption (holiday and business travellers) in Norway. Figures in billions							
Total expenditure	124.9	n/a	n/a	n/a	134.6	145.5	8%
Norwegian tourists	107.8	n/a	n/a	n/a	107.3	110.4	3%
Foreign tourists	17.1	n/a	n/a	n/a	27.3	35.1	29%
Spending by holidaymakers in Norway. Figures in billions							
Total expenditure	84.6	n/a	n/a	n/a	90.2	90.4	0%
Norwegian holidaymakers	70.0	n/a	n/a	n/a	65.1	60.4	-7%
Foreign holidaymakers	14.6	n/a	n/a	n/a	25.1	30.0	20%
Expenditure by business travellers in Norway. Figures in billions							
Total expenditure	40.4	n/a	n/a	n/a	44.4	55.1	24%
Norwegian business travellers	37.9	n/a	n/a	n/a	42.2	50.0	18%
Foreign business travellers	2.5	n/a	n/a	n/a	2.2	5.1	132%
All overnight stays (holidaymakers and business travellers) in Norway. Figures in millions							
Number of overnight stays	110.5	n/a	n/a	n/a	100.1	103.9	4%
Norwegian tourists	99.2	n/a	n/a	n/a	81.8	84.4	3%
Foreign tourists	11.3	n/a	n/a	n/a	18.3	19.6	7%
Holiday-related overnight stays in Norway. Figures in millions							
All holiday overnight stays	93.7	n/a	n/a	n/a	85.2	87.9	3%
Holiday overnight stays by Norwegians	83.7	n/a	n/a	n/a	68.6	70.6	3%
Holiday overnight stays by foreigners	10.0	n/a	n/a	n/a	16.6	17.3	4%

	2019	2020	2021	2022	2023	2024	Change over the most recent period:
Business-related overnight stays in Norway. Figures in millions							
All overnight stays for business	16.8	n/a	n/a	n/a	14.9	16.0	7%
Norwegian overnight stays for business	15.5	n/a	n/a	n/a	13.2	13.7	4%
Foreign overnight stays for business	1.3	n/a	n/a	n/a	1.7	2.3	35%
Overnight stays at commercial venues ¹. Figures in millions							
All commercial overnight stays	35.2	23.7	27.1	36.1	37.0	38.5	4%
Norwegian commercial overnight stays	24.4	20.4	23.8	26.3	25.9	26.1	1%
Foreign commercial overnight stays	10.7	3.3	3.3	9.8	11.1	12.4	12%
Overnight stays via Norwegian holiday home providers							
All overnight stays in Norway	924,301	959,043	657,375	1,426,642	1,558,058	1,800,608	16%
Overnight stays by Norwegians	156,589	463,351	479,289	1,008,503	384,817	437,481	14%
Overnight stays by foreigners	767,712	495,692	178,086	418,139	1,173,241	1,363,127	16%
Overnight stays via foreign sharing platform operators Airbnb, Booking.com, Expedia Group and Tripadvisor							
All overnight stays in Norway	3,970,205	2,465,418	2,770,666	4,719,221	6,426,851	8,310,929	29%
Overnight stays by Norwegians	1,136,346	1,467,014	1,936,722	1,670,237	2,034,170	2,452,739	21%
Overnight stays by foreigners	2,833,859	998,404	833,944	3,048,984	4,392,681	5,858,190	33%
Cruise tourism in Norway							
Number of visiting cruise passengers	944,944	20,211	41,445	1,080,768	1,523,263	1,535,235	1%
Norwegian holiday and leisure travel. Figures in millions							
All holiday and leisure travel domestic and foreign	18.5	16.0	20.0	23.8	24.8	27.0	9%
Holiday and leisure travel in Norway	11	14.6	18.4	17.8	18.3	19.8	8%
Holiday and leisure travel abroad	7.4	1.4	1.6	5.9	6.5	7.2	11%

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

Source: Statistics Norway, Norwegian Coastal Administration, Eurostat and Innovation Norway

02

The importance of tourism to Norway



Norway has had strong development in tourism

In this chapter, data from 2021 and 2019 is used, with the latter representing the last normal year with published figures from Statistics Norway.

As of today, there are no newer official data from Statistics Norway than 2021.



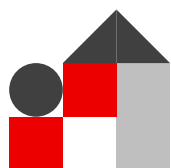
4.2% of GDP

Amounts to 126.3 billion*



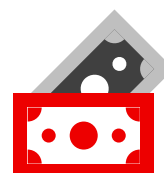
7 in 100

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



194,330 billion

Total tourism consumption



59.4 billion

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

Tourist consumption

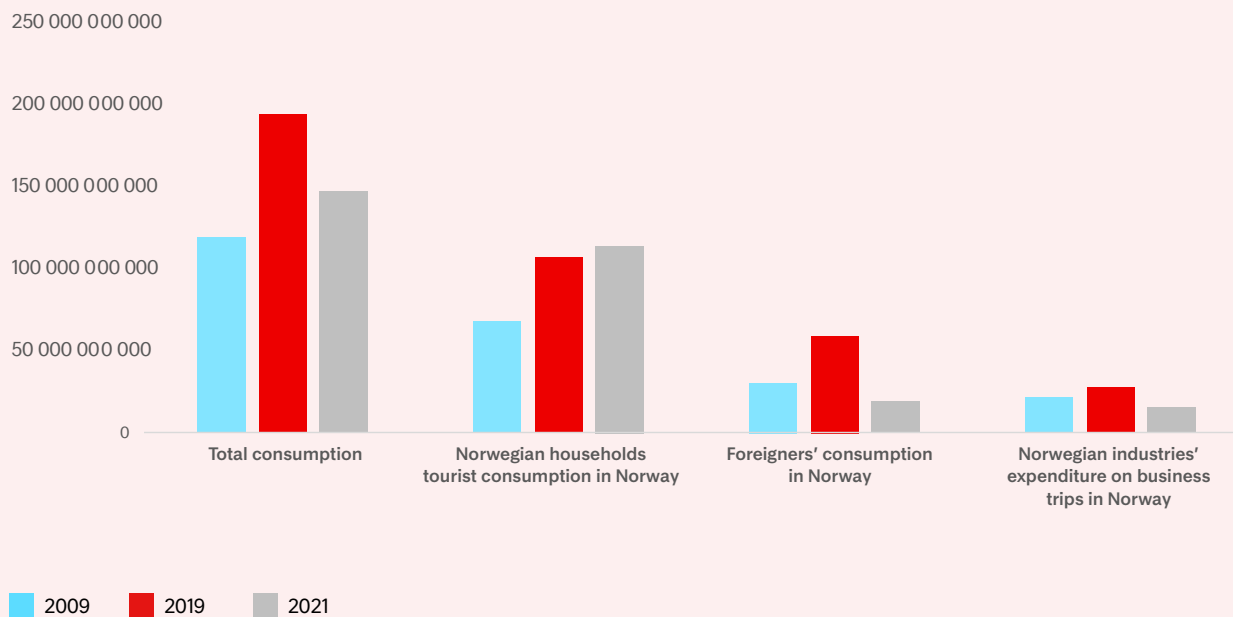
According to figures from Statistics Norway, the total tourist consumption in 2019 was calculated as being NOK 194.3 billion. Of this, NOK 126.3 billion went on the purchase of goods and services defined as tourism products, such as transport, accommodation, catering, distribution, cultural activities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

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

The tourism year 2021 was a year of records, both high and low. The 2021 results were clearly affected

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

Distribution of total consumption

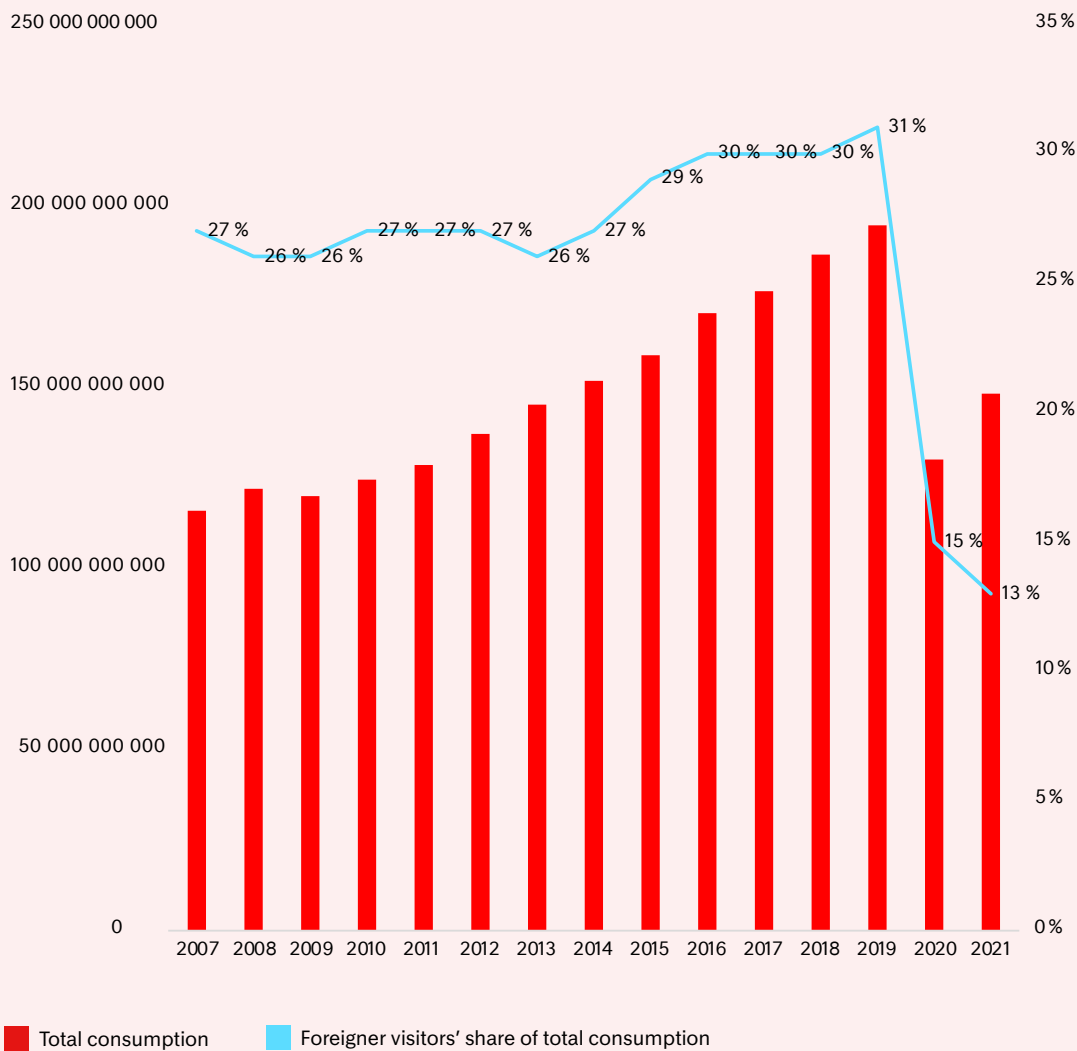


Source: Tourism Satellite Accounts, Statistics Norway

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

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

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



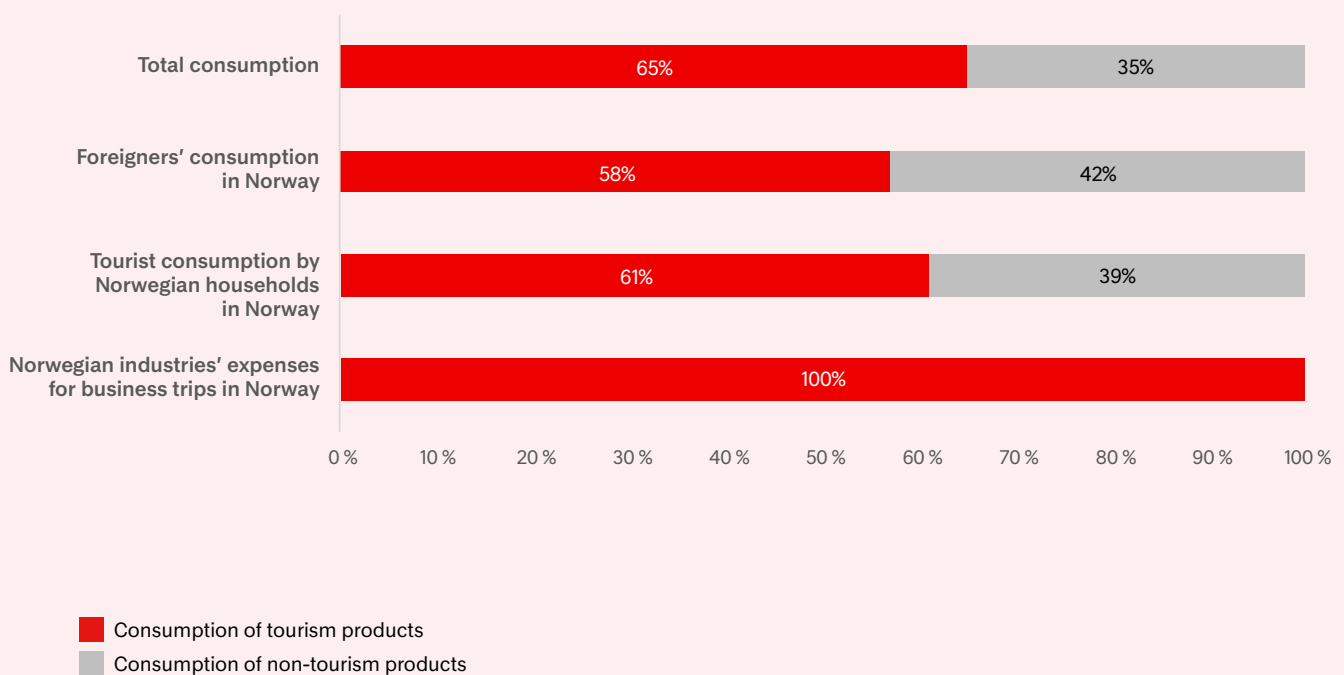
Source: Tourism Satellite Accounts, Statistics Norway

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

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

Of the total tourist consumption of NOK 194.3 billion, NOK 126.3 billion went to tourism products such as transport, accommodation, catering, distribution,

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

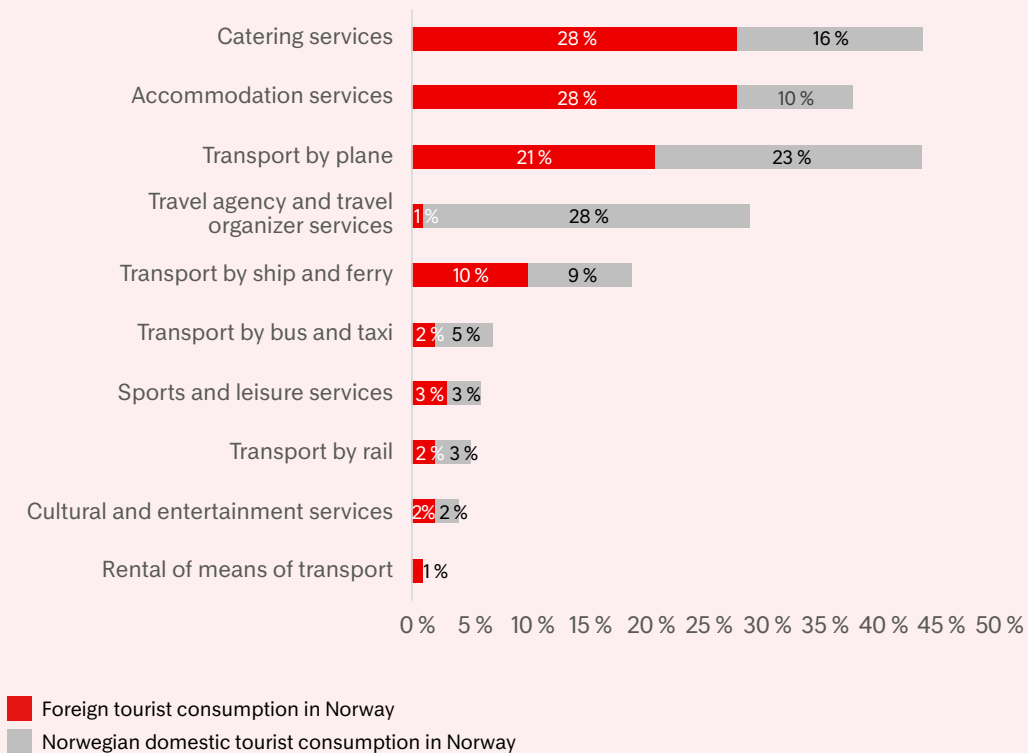


Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

Distribution of tourist expenditure 2019

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

The graph is sorted by highest total consumption



Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

7 in 100 people work in the tourism industries

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

Decrease during the pandemic

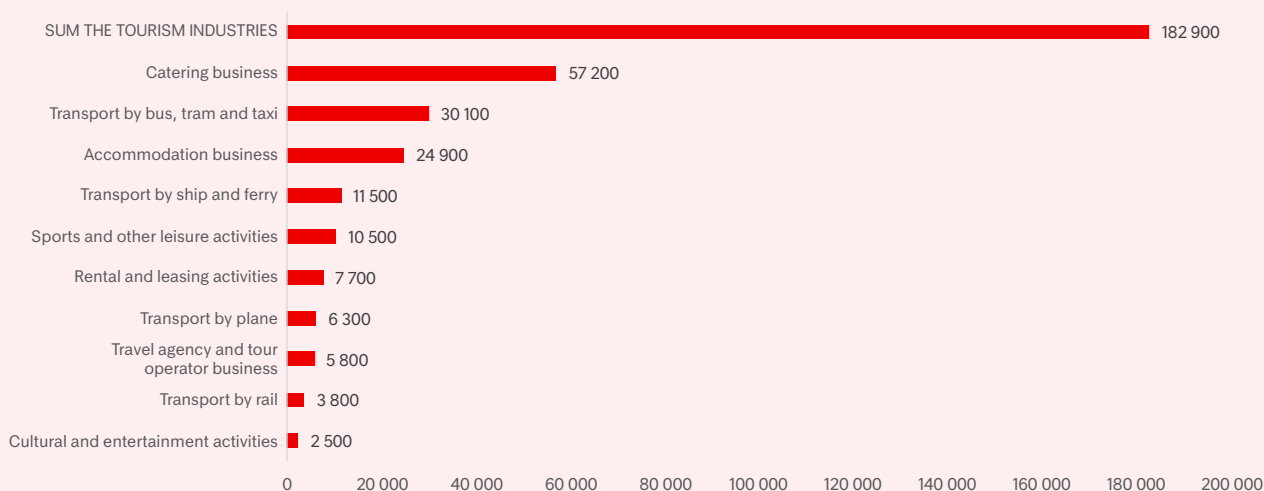
During the pandemic, the share of employment in the tourism industry fell from 7.4 per cent to 6.6 per cent of all employment in the country. In 2021, there

were 162,000 full-time equivalents (FTEs) related to the tourism industry, a decrease of 3,600 the previous year and almost 21,000 fewer than in 2019. At the same time, the number of FTEs on mainland Norway increased by 1.5 per cent, something which shows that the tourism industry was losing ground.

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

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

Distribution of the number of employees in the industry



Source: Tourism Satellite Accounts, 2019 data. Statistics Norway

03

International tourism, Norway's share and future expectations



World tourism returned to pre-pandemic levels in 2024

International tourism increased positively in 2024 and the number of journeys across national borders with one overnight stay or more was 1.4 billion. That is 11 per cent more than in 2023, and the number of arrivals is only one per cent below 2019. There is a large difference between the various parts of the world in the strength of their post-pandemic recovery.

The Middle East, Africa and Europe are above 2019 levels

While arrivals to Europe are one per cent higher, it is the Middle East and Africa that have seen the strongest increase. Arrivals to the Middle East are 34 per cent higher than before the pandemic and arrivals to Africa have seen a seven per cent increase. Arrivals to America are three per cent lower, and arrivals to Asia and the Pacific countries are still 13 per cent below 2019 levels and remain the part of the world struggling the most to recover. South Asia is doing the best, and in terms of individual destinations, it is arrivals to the Maldives that have increased the most, by 20 per cent, followed by Japan at 16 per cent. Fiji increased by ten per cent and Sri Lanka by seven per cent compared to 2019.

Forecasts from UN Tourism predict a growth in 2025 of between three and five per cent on 2024.

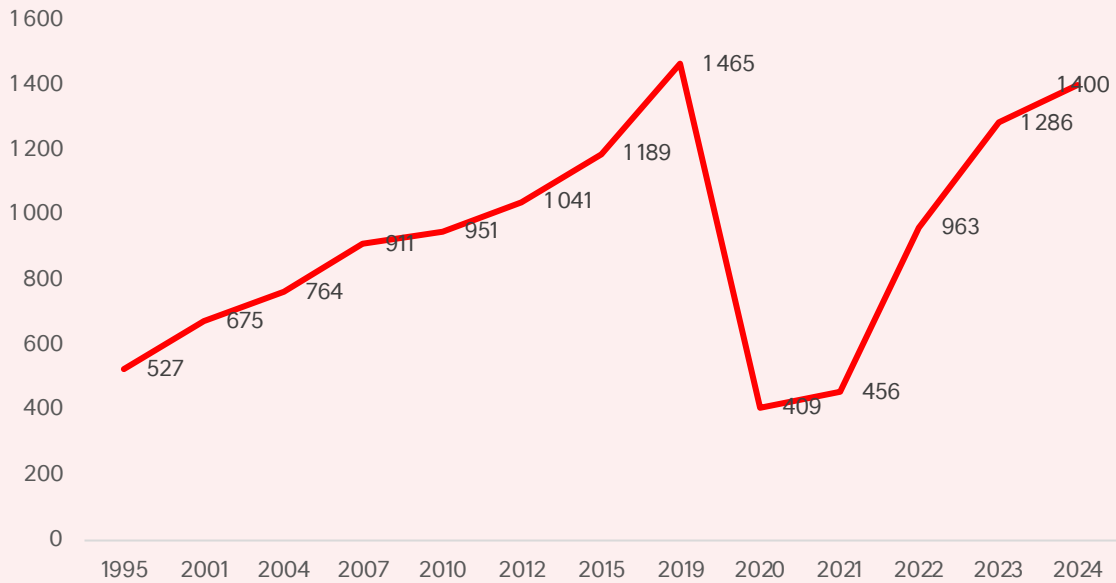
2020 was the worst year for international tourism with only 400 million cross-border journeys involving one night or more. This increased to 415 million trips in 2021. After ten years of continuous growth and a good start to 2020, all global travel came to an abrupt halt. From 1.5 billion cross-border journeys in 2019, the number of trips decreased by 73 per cent in 2020, resulting in the worst ever year for international tourism. Travel and tourism picked up slightly in 2021, with 4 per cent growth compared to the previous year. Nevertheless, the number of cross-border journeys made is 72 per cent below the 2019 level.

Norwegians continue explore their own country as a holiday destination

Since the pandemic, the tourism industry in many countries has experienced a major increase in domestic travel – and Norway is no exception. According to Statistics Norway's Tourism Survey, 2021 was a record year with the highest number of holidays in Norway ever recorded by Norwegians. This trend has continued in subsequent years. In 2024, Norwegians had a total of 19.8 million domestic trips – an increase from both the record year of 2021 and a whole 8.7 million more than 2019.

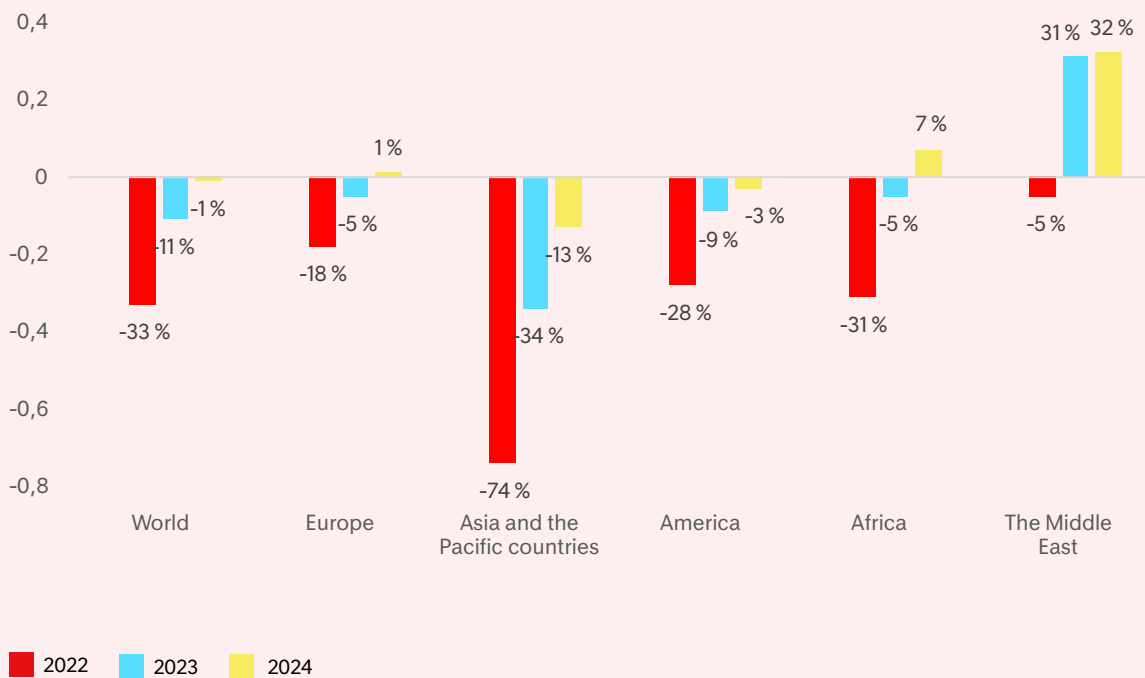
International tourist arrivals involving at least one overnight stay

Figures in millions



Large variations between the parts of the world

% change in arrivals from 2019



Source: UN World Tourism Organization (UNWTO)

Europe is the most visited

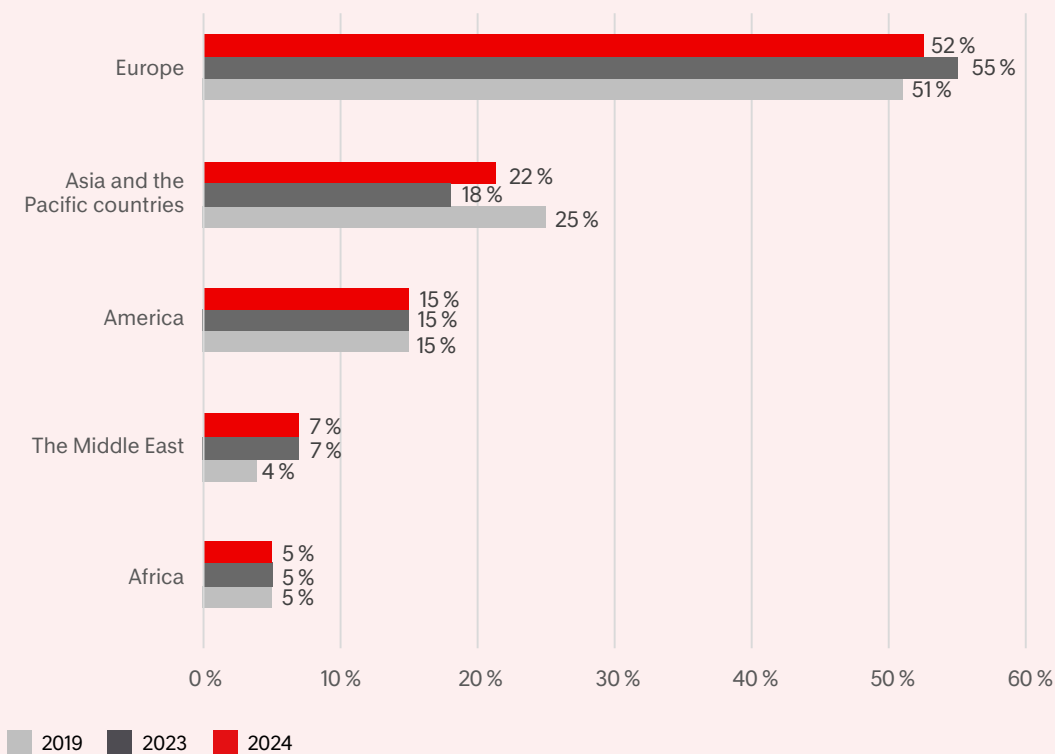
52 per cent of all arrivals in 2024 were to a European country. Europe has always been the most visited part of the world. While this has always been the case, Europe’s share was falling up to the pandemic. In 2019, Europe’s market share was 51 per cent, while in 1980 it was 63 per cent. The fact that the share in 2024 is higher than before the pandemic may be related to the fact that arrivals to Asia and the Pacific countries have not fully recovered and that many are travelling less now than they were up to 2019.

Europe, which accounts for more than half of all arrivals, is still the most visited continent.




Tourism is defined as all activities that people participate in outside their normal place of residence, irrespective of purpose. This means that tourism includes all travel, both leisure and business travel

Breakdown of international tourist arrivals

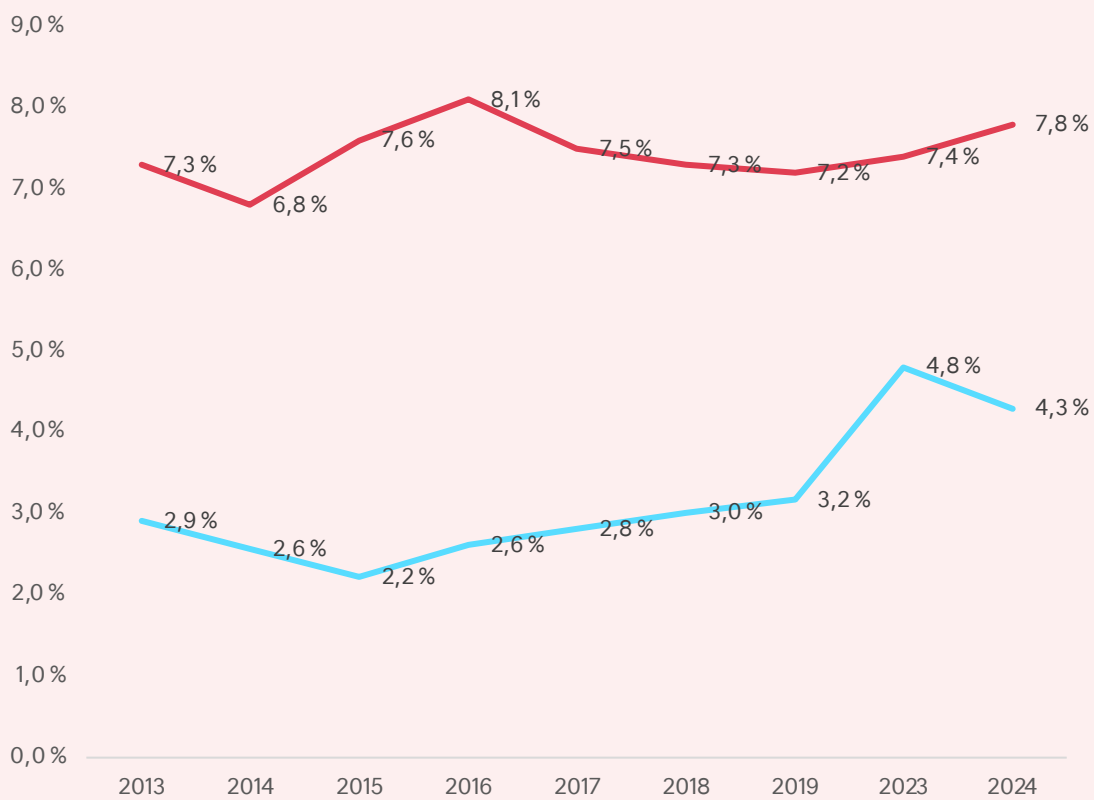


Source: UN World Tourism Organization (UNWTO)

Norway's share of international tourism and of international cruise tourism



Norway's share of international tourism is 0.5 per cent



■ Norway's share of arrivals in Northern Europe ■ Norway's market share of all cruise passengers

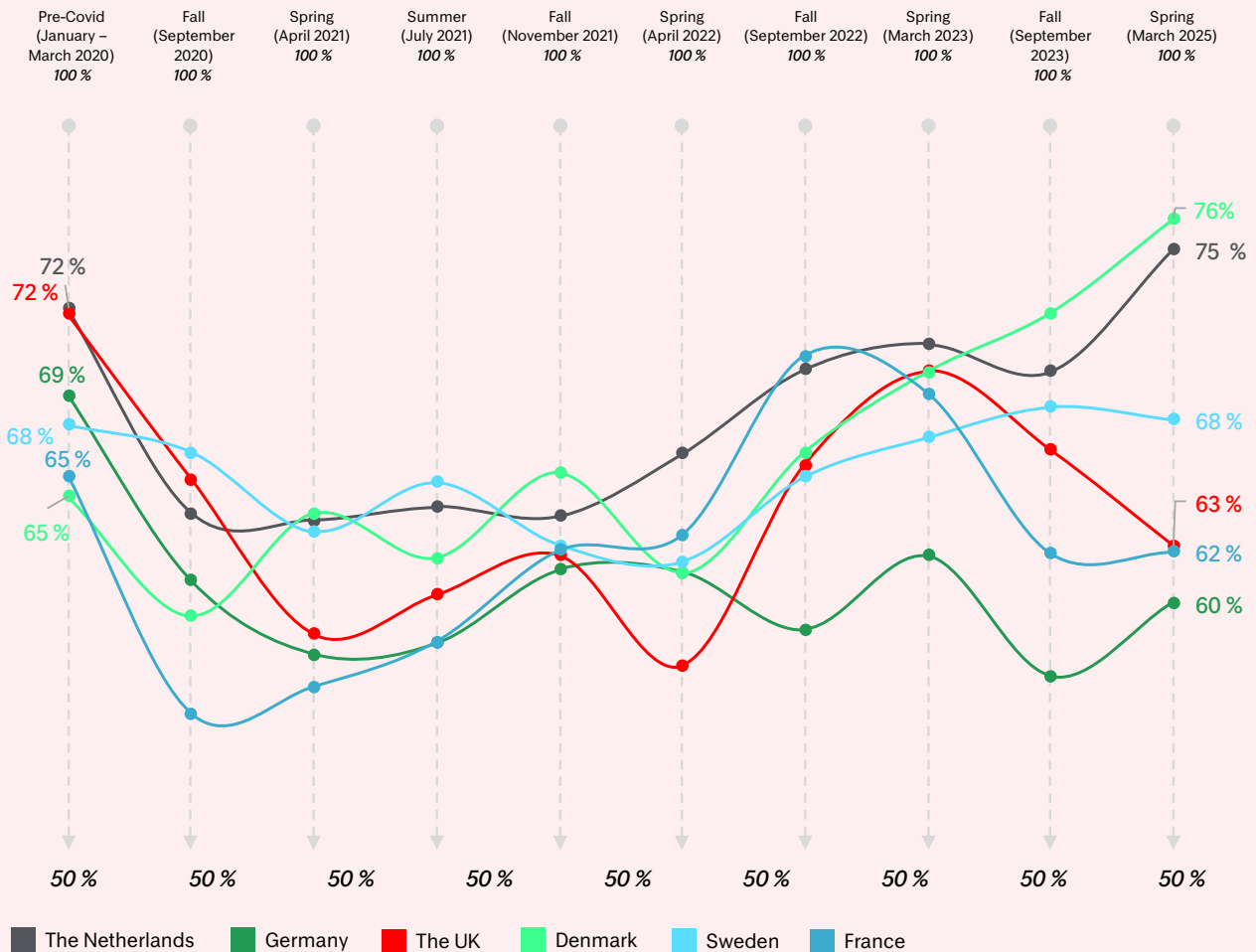
Source: Statistics Norway, UN Tourism, the Norwegian Coastal Administration and Cruise Lines International Association (CLIA)

Proportion of potential tourists is still slightly down compared to pre-Covid period

The proportion of the population that has been on holiday abroad in the past 3 years and wants to travel abroad in the coming 3 years is almost at the same level as in 2019. However, there is large variation between markets, as shown in the graph below. There are more people from Denmark and the Netherlands who want to travel abroad than before the pandemic, while the UK and Germany

are still significantly down. Currently, slightly fewer people want to travel abroad in the coming year than during the same period in 2023. It is probably due to the fact that many people experience uncertainty related to their own economy and the political and economic situation in general when the Survey was carried out in spring 2025.

Sharp increase in the proportion of people who want to travel abroad in Denmark and the Netherlands



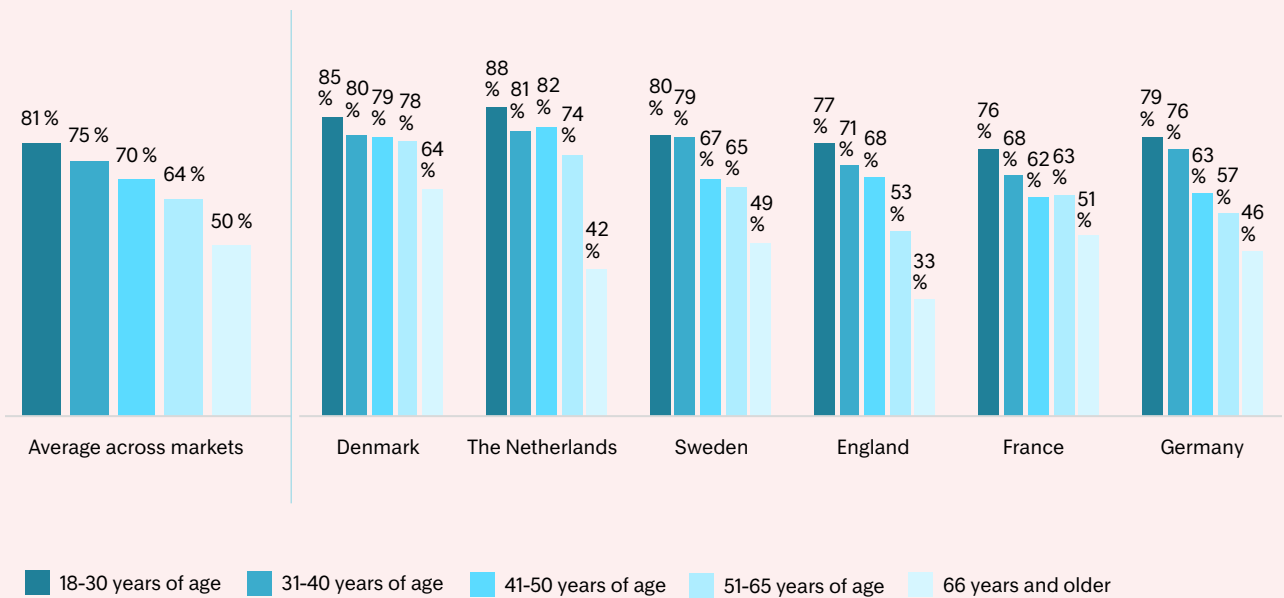
Source: Travel Barometer, Innovation Norway

Interest in travelling abroad steadily decreases with increasing age

Over 80 per cent of people aged 18-34 plan to travel abroad on holiday over the course of the next three years. By way of comparison, the same is true for only half of those aged 66 or older. In Denmark and the Netherlands, there is a strong desire to travel for those in all age groups up 65 years old, while interest in other markets begins to taper off for

people in their forties. This phenomenon is a major part of explaining why the target group for travel is significantly greater in Denmark and the Netherlands than in other markets.

Development in the proportion of potential tourists – those interested in travelling abroad in the next three years – across age groups



Source: Travel Barometer, spring 2025, Innovation Norway

04

The Norwegian Tourism Year 2024



Number of overnight stays and expenditure

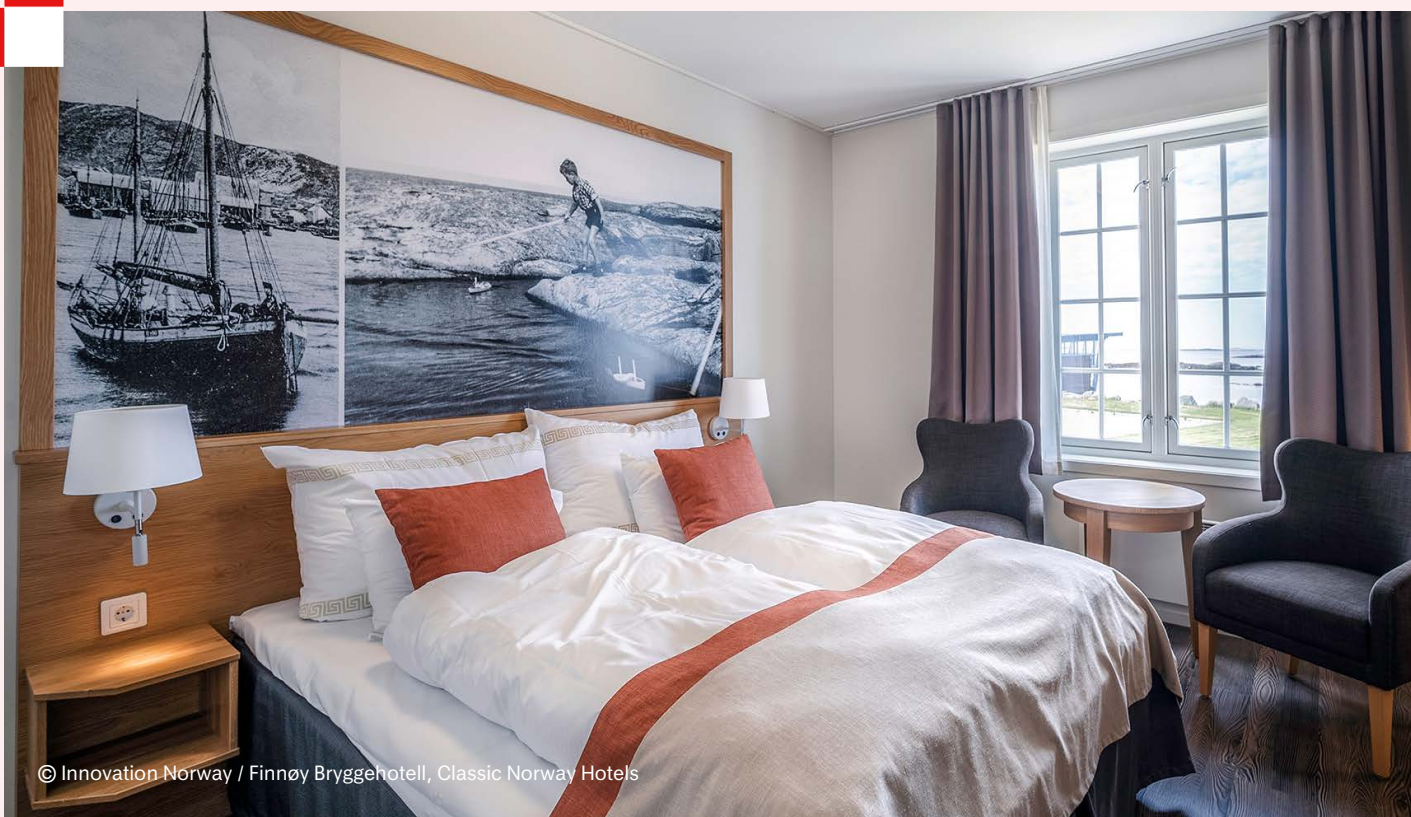
As previously mentioned, tourism includes all activities that people participate in outside their normal place of residence, irrespective of purpose. This includes both holiday and business travel.

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

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

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

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



Total volume and expenditure of travellers visiting Norway in 2024

60 per cent of the total expenditure on travel in Norway in 2024 is related to leisure travel and 40 per cent to business travel. Norwegians account for NOK 3 out of 4 spent on travel in Norway.

There has been an increase in both overnight stays and expenditure from 2019 to 2024. In 2024, estimates show that there were 103.9 million overnight stays and a total expenditure of NOK 145.5 billion.

Export revenues from foreign tourists have increased by about NOK 10 billion from 2019 to 2024. Tourists are spending more money per day and in total, while there has also been significant growth in volume.

Tourists who have travelled the longest spend the most money. The top five markets measured in average daily expenditure are China, Australia, the United States, Canada and the United Kingdom.

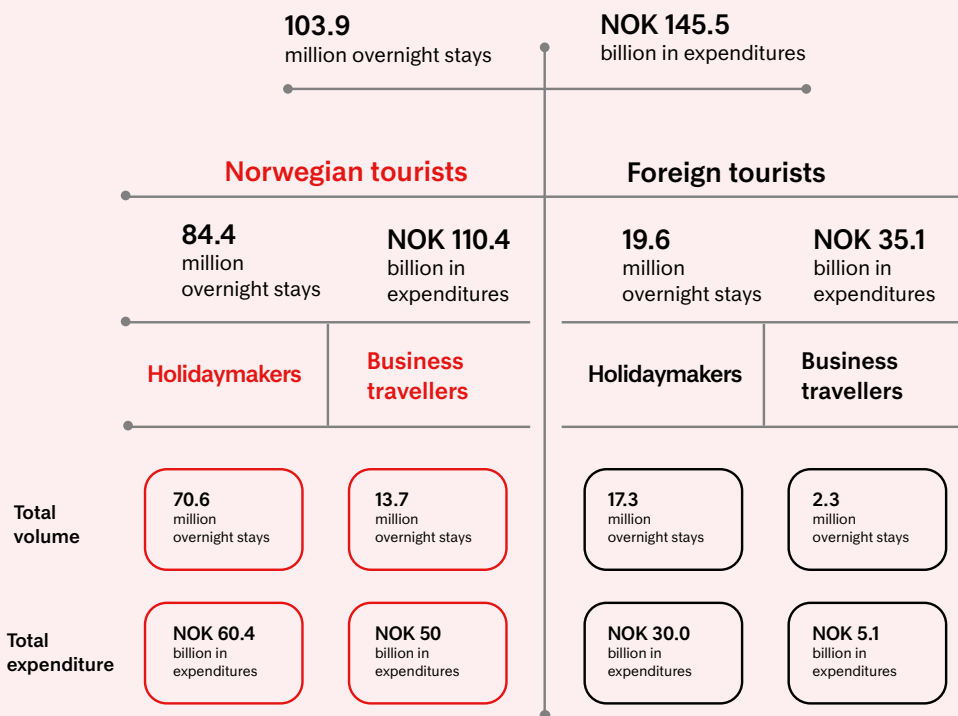
The British market is in a unique position with high expenditure, good growth and relatively short distance to travel.

Expenditure calculations are challenging

There is uncertainty when calculating expenditure and overnight stays. There are few statistics on the volume of overnight stays beyond commercial overnight stays recorded in Statistics Norway's overnight stay statistics or on distribution between holiday and leisure and business trips, other than what is recorded in the hotel statistics by Statistics Norway.

The calculation uses a number of different sources to estimate total volume and expenditure in addition to Statistics Norway's statistics; samples from the Tourist Survey, statistics from Hurtigurten and Havila, the Norwegian Travel Habit Survey on aeroplanes and Statistics Norway's Tourism Survey for Norwegians.

The greatest degree of uncertainty is associated with the estimates for Norwegians, business travellers and travellers who have few commercial overnight stays.



Source: The Tourism Survey, Innovation Norway

A weakened exchange rate gives foreign visitors more for their money

In recent years, the Norwegian Krone has been relatively weak against the Euro, Sterling, US Dollar, Danish Krone, and Swedish Krona. This has been beneficial to the tourism industry as an export industry.

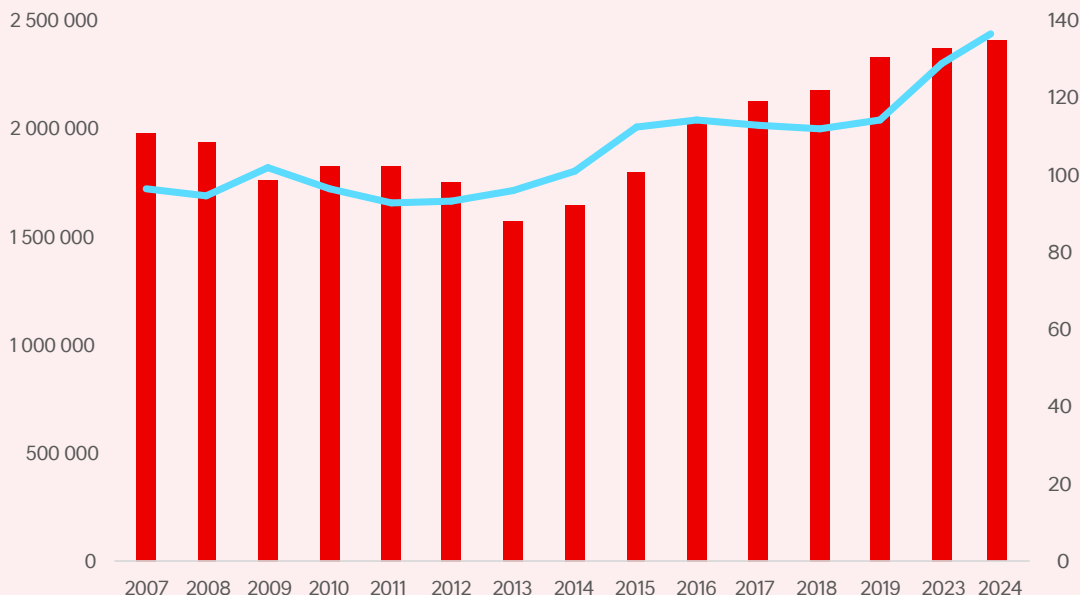
Norway's ability to compete can be measured using the Competition Price Index. An increase on this index indicates a weak Krone, which makes Norway more competitive, and vice versa. The weaker the Krone exchange rate, the more competitive Norway becomes.

Norway's competitiveness has increased since 2019

The Norwegian krone has weakened significantly in recent years, meaning foreign tourists get more for their money during a holiday to Norway. In 2019, the Competition Price Index was at 114, while in 2024 it had increased to 131. This represents a growth of 15 per cent.

Competition Price Index % (July)

Foreign commercial overnight stays (July)



Competition Price Index % (July) Foreign commercial overnight stays (July)

Source: Norges Bank and Statistics Norway

Holiday and leisure expenditure has increased by more than 50 per cent between 2019 and 2024

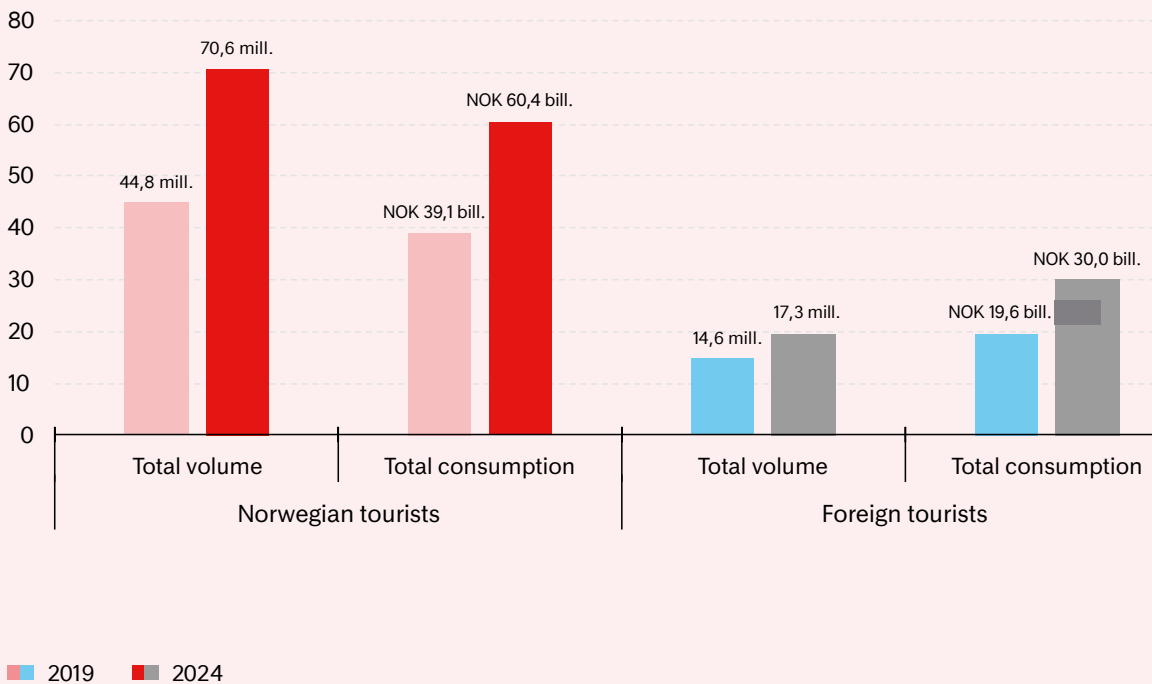
This estimate points to a significant growth in holiday and leisure expenditure in Norway from 2019 to 2024. Expenditure from foreign tourists has increased in excess of NOK 10 billion and expenditure from Norwegian holidaymakers and leisure travellers has increased in excess of NOK 20 billion.

leisure overnight stays. According to Statistics Norway’s Tourism Survey, there has been particular growth in non-commercial accommodation amongst Norwegians since the pandemic. During the pandemic, many bought cabins and sharing platforms made it easier to rent out cabins.

Inflation over the same period was 22.8 per cent, meaning that expenditure has increased more than inflation. For Norwegians, increased expenditure is down to far more holiday and

For foreign holidaymakers, the growth in expenditure is down to both a growth in volume and that expenditure has grown more than inflation.

Developments in total volume and expenditure for Norwegian and foreign holiday and leisure travellers.



Source: The Tourism Survey, Innovation Norway

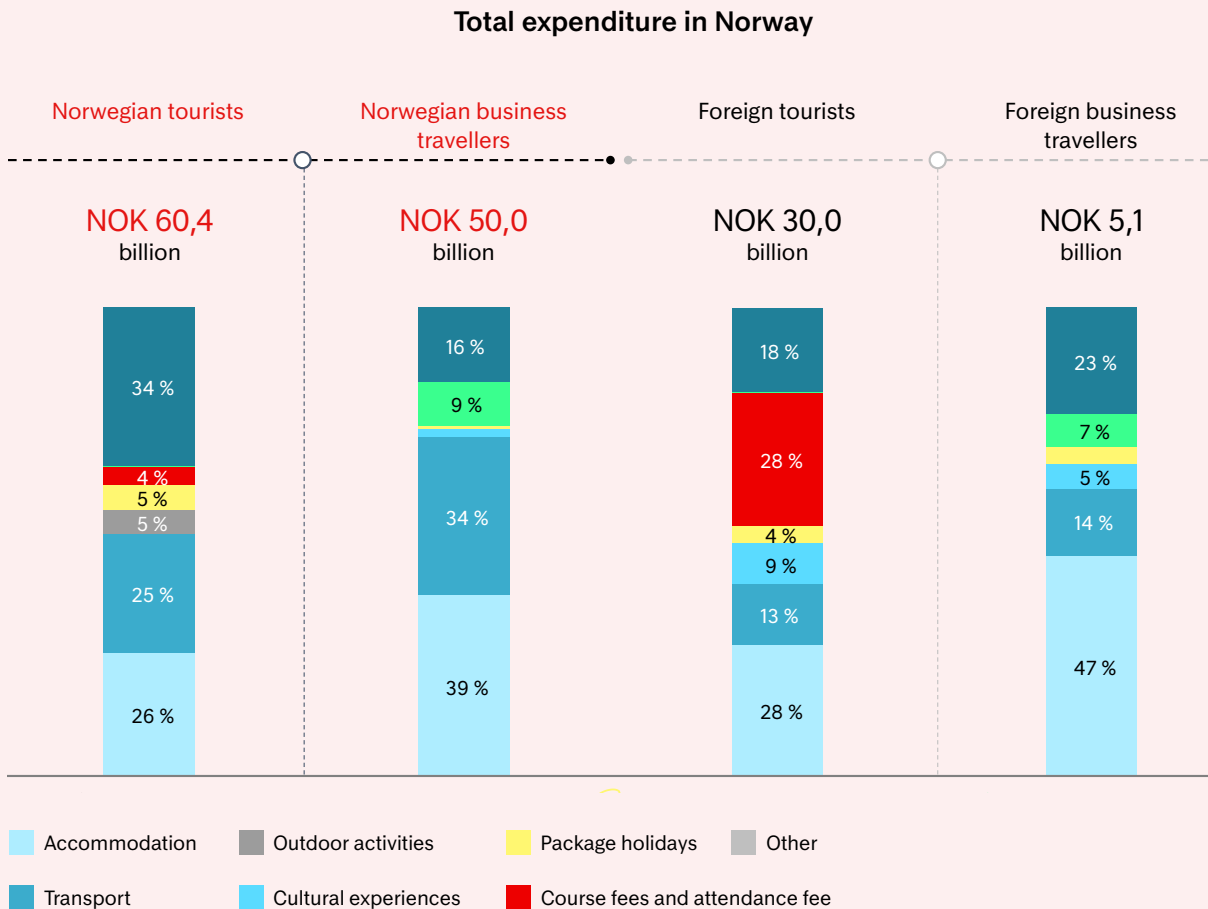
More overnight stays by foreigners leading to a greater total expenditure

Total expenditure for foreign holidaymakers has increased from 2019 due to both more overnight stays and higher expenditure. The proportion spent on accommodation, transport and package holidays is about the same as 2019 levels.

Norwegians spend a far greater proportion of their expenditure on 'other' expenses. These include shopping, buying groceries, restaurants and eateries.

Package holidays are a markedly greater share of total expenditure for foreign holidaymakers. More than one in four foreign holidaymakers book the entirety or parts of their holiday as a package deal. The vast majority of packages include accommodation (88 per cent) and/or transport to Norway (59 per cent).

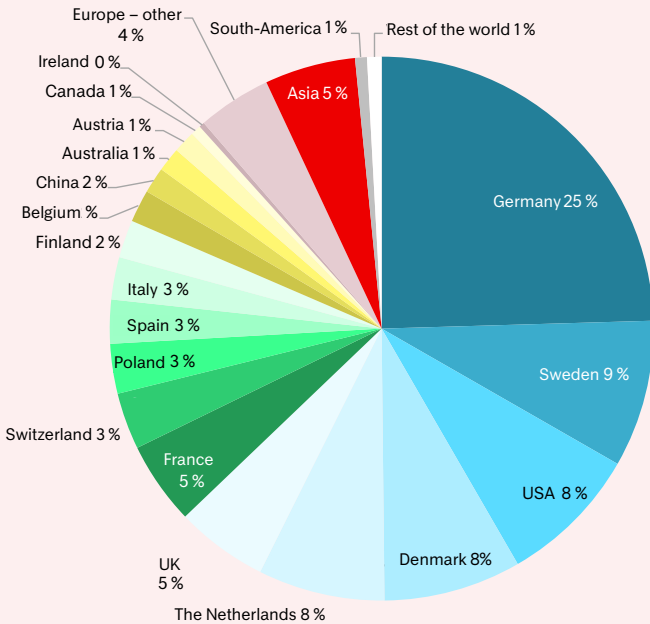
Distribution of expenditure per item



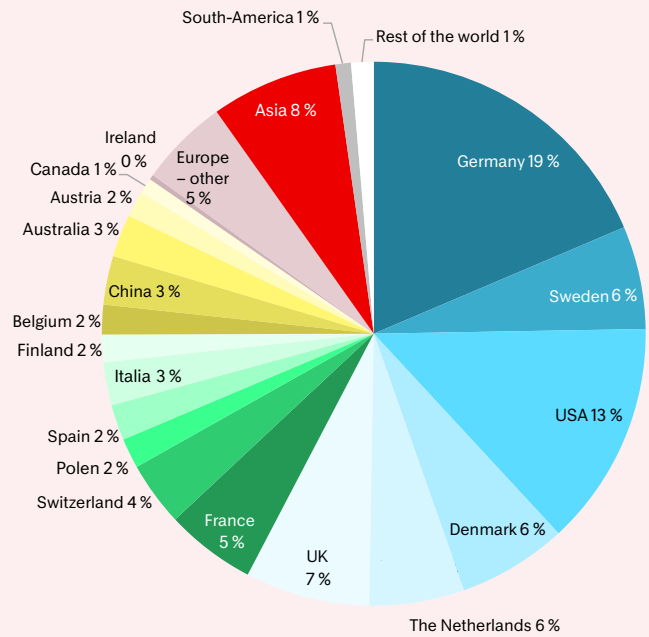
Foreign holidaymakers' share of overnight stays and expenditures

Germany is the largest market overall measured both by overnight stays and expenditure; however, since German tourists spend less money per day than the average, they only constitute 19 per cent of volume measured in expenditure, but a whole 25 per cent measured in the number of overnight stays. This means that one in four foreign overnight stays in Norway are from Germans. The reverse is true for Americans, who make up only 8 per cent of overnight stays, but account for 13 per cent of expenditure.

Foreign holidaymakers' share of overnight stays



Foreign holidaymakers' share of expenditures



Source: The Tourism Survey, Innovation Norway

The economic contribution of the foreign holiday markets

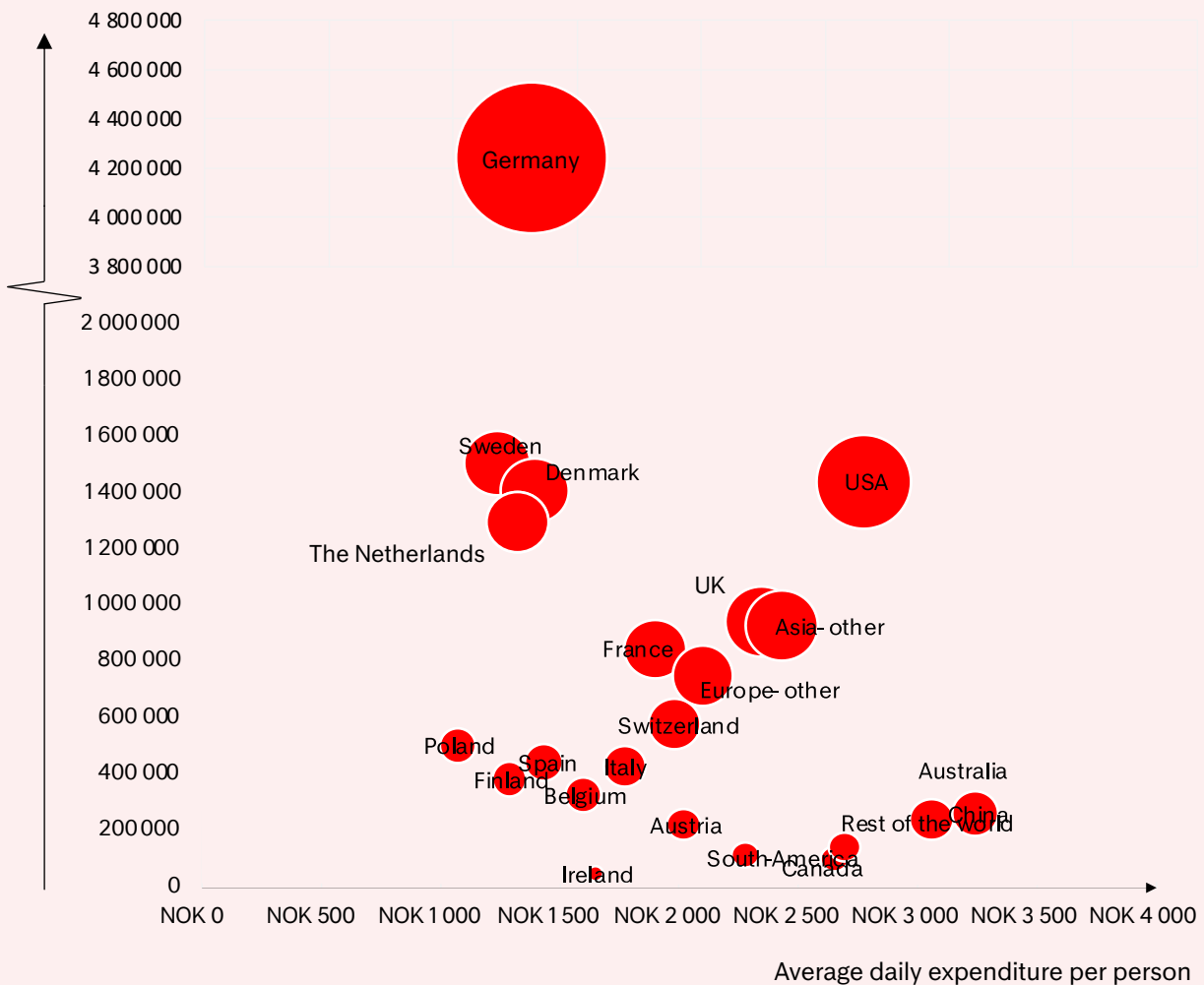
There are a number of important foreign markets in Norway

Below, we can see the total expenditure for the various foreign holiday markets. The total expenditure is calculated based on the total volume (number of overnight stays) and the average daily expenditure per person (per market).

We see that Germany continues to be one of the most important markets for Norway, primarily due to the large volume (many overnight stays). The US is another important market, but this is more due to a high daily expenditure per person.

The total expenditure of the holiday markets in Norway

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



Source: The Tourism Survey, Innovation Norway

Total volume and expenditure of the foreign holiday markets

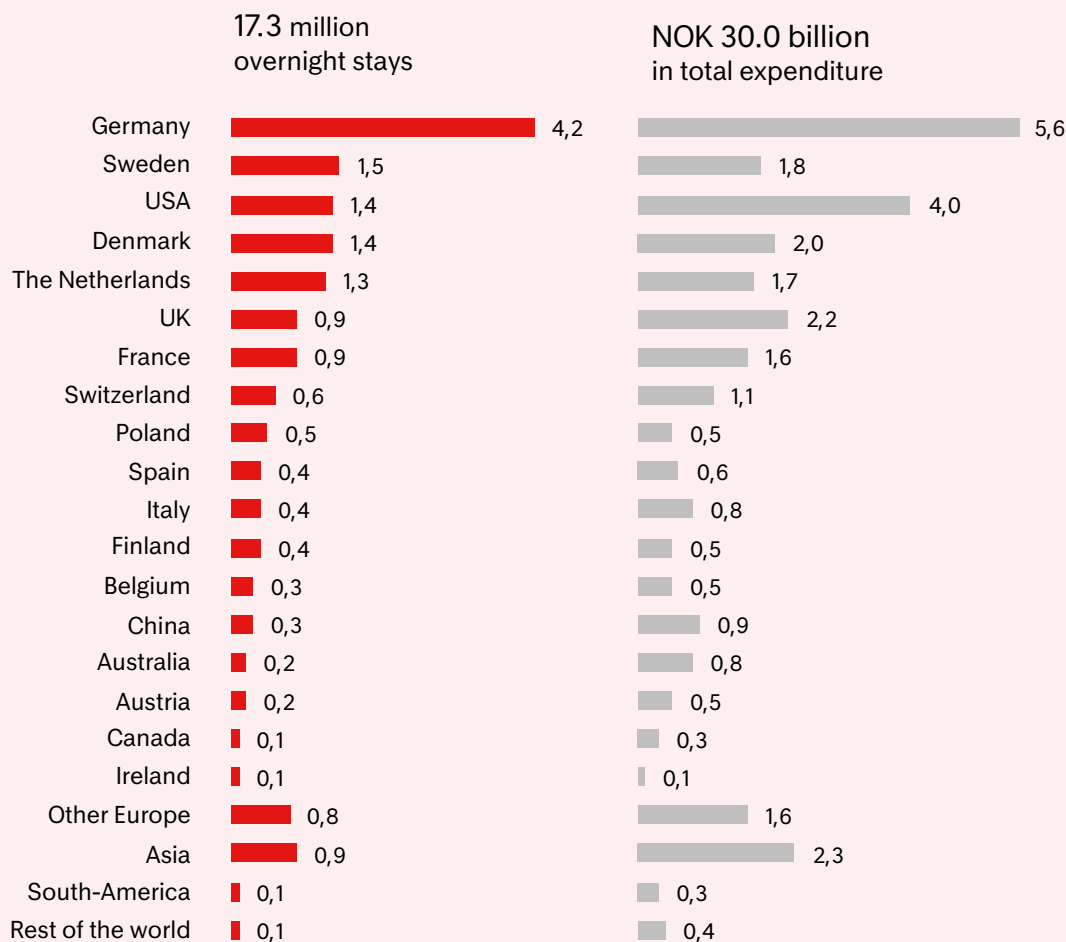
All the Nordic markets, as well as Germany, the Netherlands and Poland, have a lower daily expenditure than average. This means that these markets are of less significance measured in expenditure than volume of overnight stays.

The important neighbouring markets of Germany, Sweden, the Netherlands and Denmark account for 49 per cent of overnight stays in Norway, but only 37 per cent of expenditure.

For the United States, United Kingdom, Australia, China and the rest of Asia, the relationship is reversed. These markets account for 22 per cent of overnight stays and for 34 per cent of foreign holiday expenditure in Norway.

The United Kingdom is in a unique position as a relatively close market with far higher daily expenditure than average, and is thus of greater significance in terms of expenditure than volume.

Total volume and expenditure per foreign holiday market.



Source: The Tourism Survey, Innovation Norway

More than half of expenditure goes on purchasing package holidays and accommodation

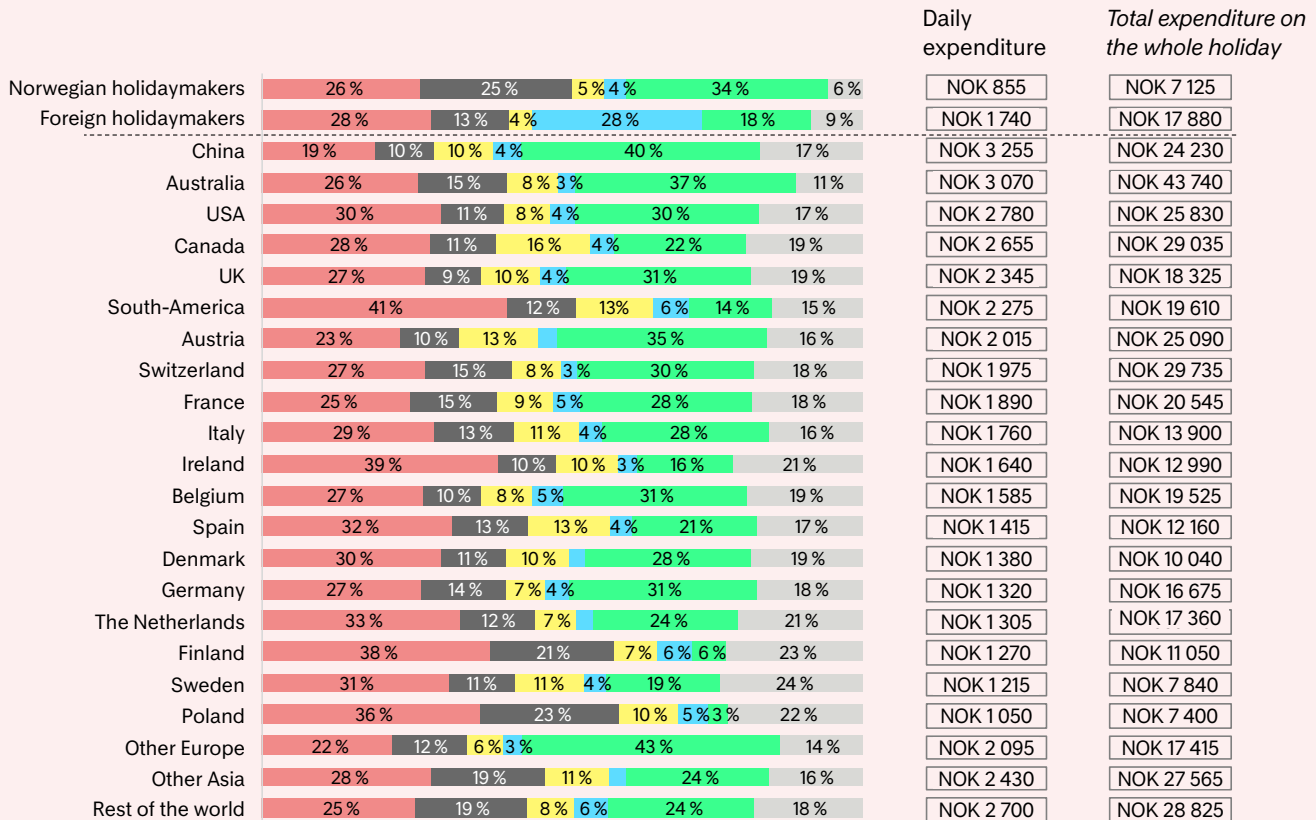
The tourists who have travelled the farthest spend the most money per day on their holiday in Norway, even if transport costs to Norway are not included in the calculation of expenditure. The top five markets measured in average daily expenditure are China, Australia, the United States, Canada and the United Kingdom.

The graph shows daily expenditure and total expenditure per person on the holiday in Norway, and how the expenditure is distributed across

different types of expenses. Nearly NOK 6 out of 10 goes towards accommodation and package holiday expenses for foreign guests. Norwegians spend a larger proportion of their expenditure on 'other' items, which covers all other types of expenses such as restaurants and eateries, shopping, etc.

Markets with a high proportion of package holidays can have artificially high expenditure because transport to Norway is often included in the package. This is especially true of the Danes, the Chinese and the British.

Average daily expenditure and total expenditures on holiday per person



Accommodation Outdoor activities Package holidays
 Transport Cultural experiences Other

NB: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100 per cent. Percentages of or below 3 per cent are not included. Course fees and attendance fees are not included as they account for less than 1 per cent of expenditure. Daily expenditure on transport to Norway is not included in the calculation of daily expenditure and total expenditure. Transportation may be included in the calculation for those who have purchased package holidays. The average expenditure has been rounded to the closest NOK 5.

Source: The 2024 Tourism Survey, Innovation Norway

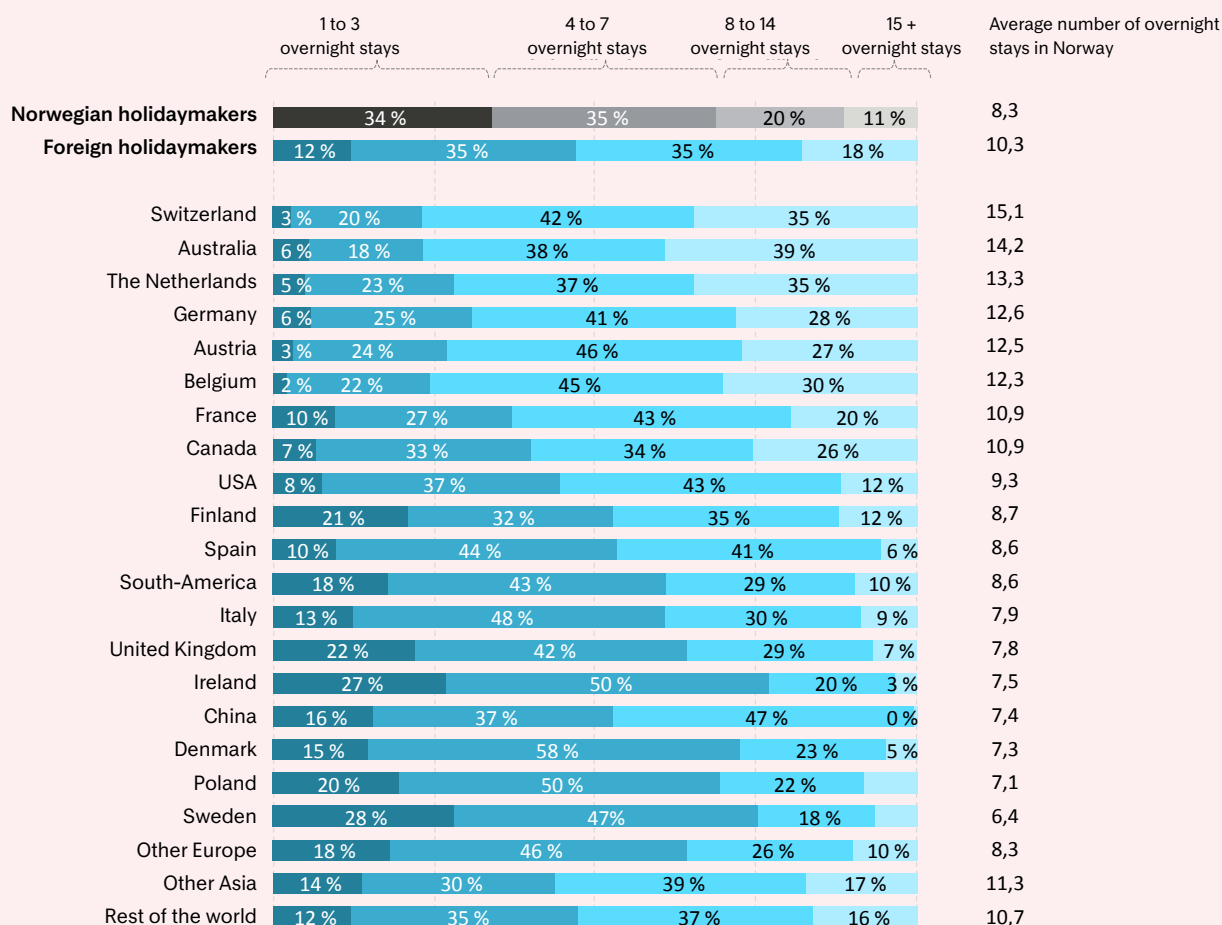
About 70 per cent of international tourists in Norway stay for between four and fourteen days

Larger numbers of travellers from Switzerland, Australia, the Netherlands, Belgium, Germany and Austria are in Norway for 15 nights or more, especially during the summer season. These tourists contribute to increasing the average length of stay for these markets.

Across all markets, the vast majority of tourists in Norway stay from 4 to 14 days. 6 out of 10 Danish tourists stay in Norway for between 4 and 7 days.

The average length of stay is approximately the same as in 2019 for foreign holidaymakers overall.

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



Source: The 2024 Tourism Survey, Innovation Norway

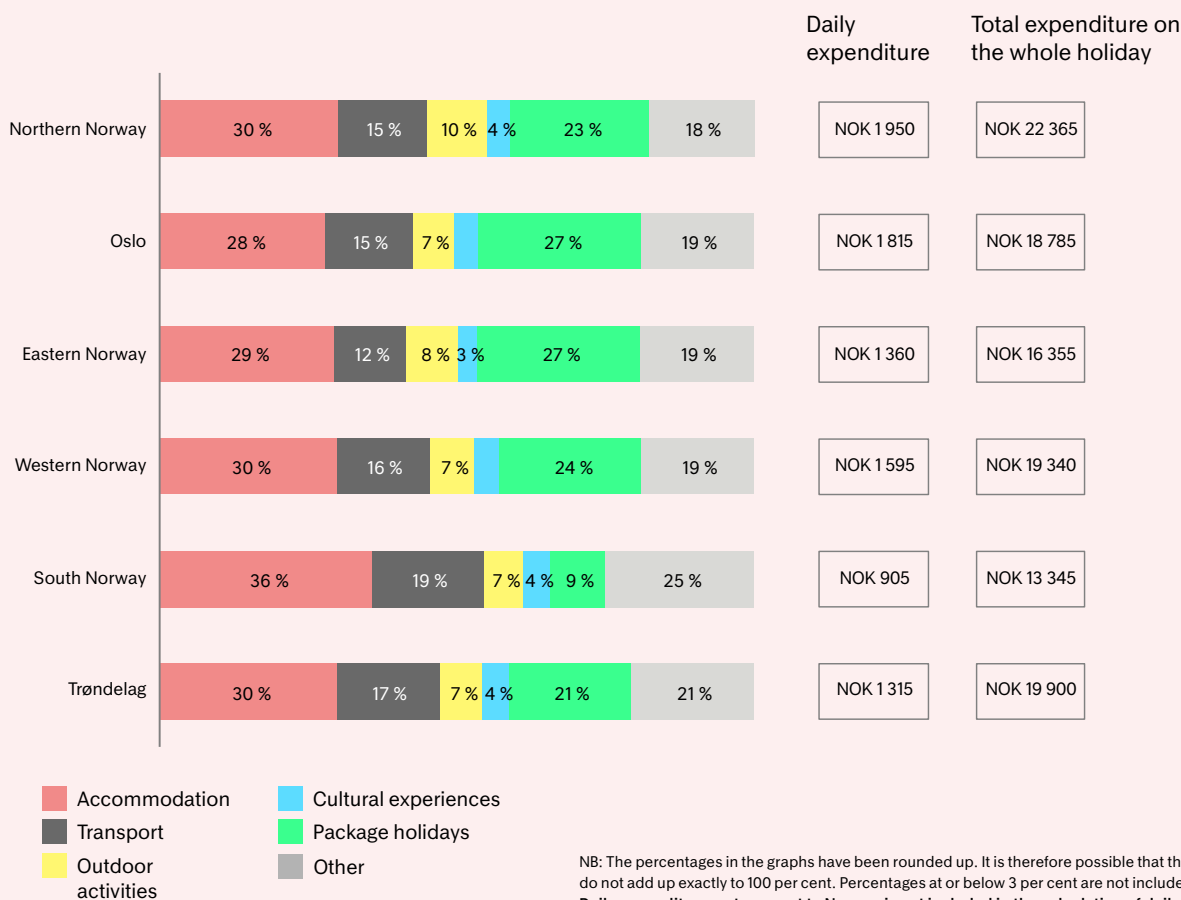
NB: Percentages at or below 2 per cent are not included.

Tourists in Northern Norway spend the most money

Tourists visiting Northern Norway in the winter season are primarily responsible for pushing expenditure up. In Northern Norway, it is tourists with a base in the region who push expenditure up, but for the other regions (with the exception of Trøndelag) it is round-trip tourists who raise daily expenditure.

Almost one in three tourists in Northern Norway spend more than NOK 2,000 per day, and that is not including transport to Norway. Almost half of tourists with a base in Northern Norway have participated in organised outdoor activities or activities with a tour guide, which is far higher than tourists visiting other regions.

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 per cent. Percentages at or below 3 per cent are not included.

Daily expenditure on transport to Norway is not included in the calculation of daily expenditure and total expenditure.

The average expenditure has been rounded to the closest NOK 5. The expenditure figures in the regions are from the Tourism Survey, as the consumption model is imprecise in terms of holiday type and holiday market within the regions.

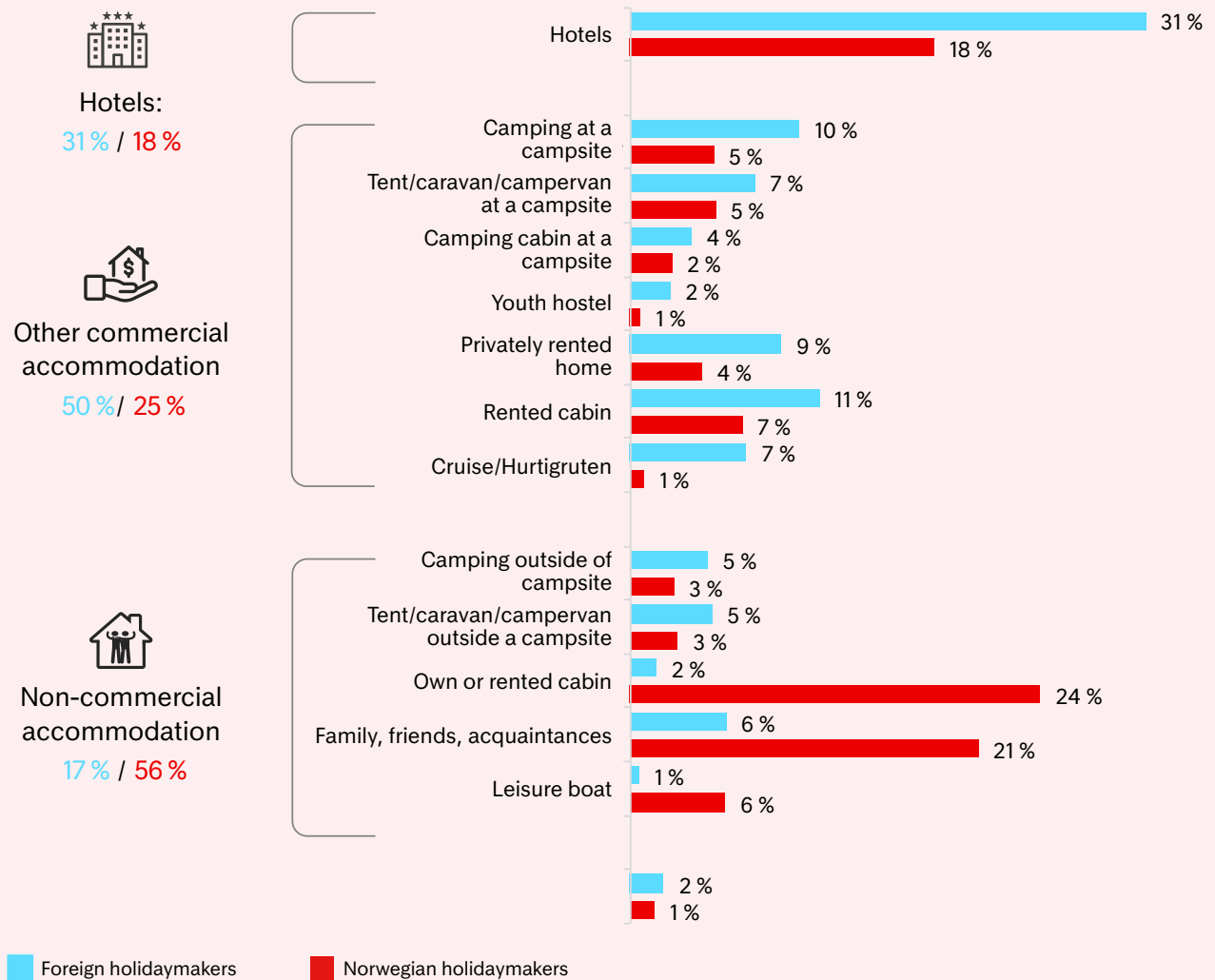
Source: The 2024 Tourism Survey, Innovation Norway

One in three foreign overnight stays are at hotels

Foreign tourists stay more in hotels, rented private homes and rented cabins outside of the summer season.

The proportion of people staying in rented private homes and rented cabins has increased significantly since the pandemic, and the proportion staying in hotels has declined.

Distribution of holidaymakers' overnight stays according to accommodation type



Source: The Tourism Survey, Innovation Norway

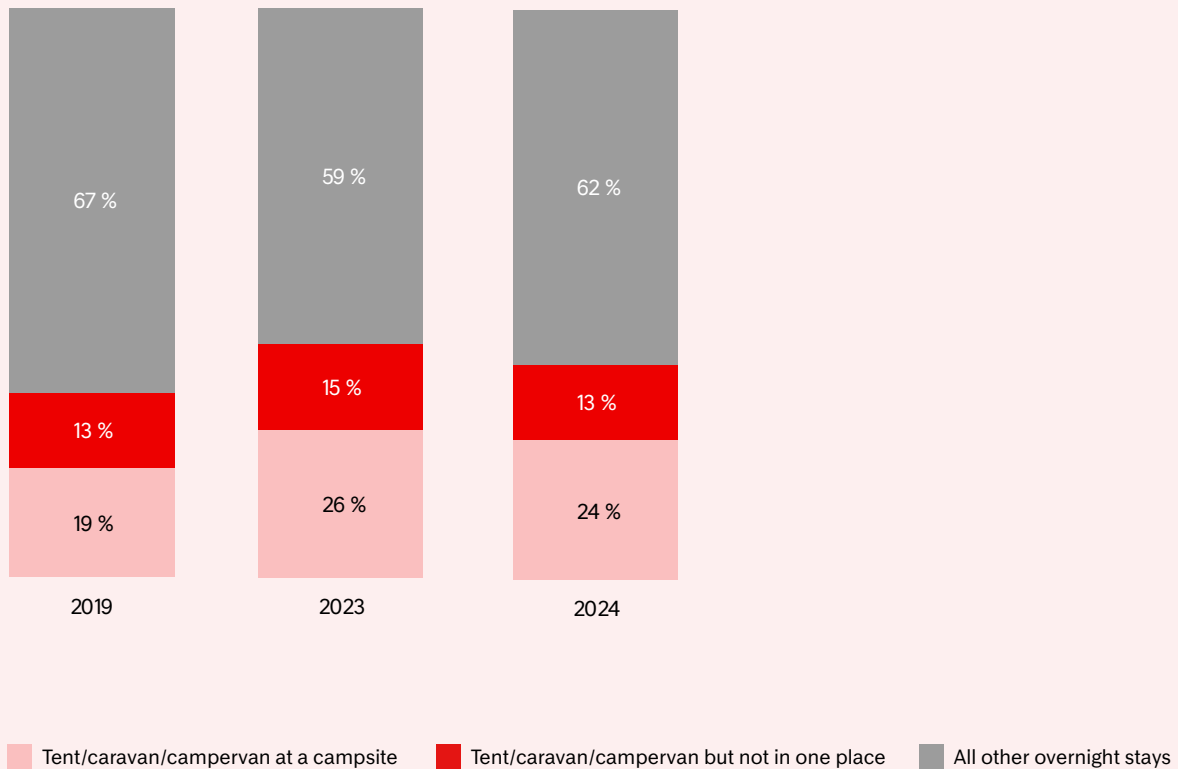
Major growth of foreign overnight camping stays

When we look at developments in foreign overnight stays, there has not only been solid growth since 2019, but also a marked increase in the proportion of those choosing to go camping or stay in a campervan, both at and outside of official campsites. This type of overnight stay has grown

more than others, while the graph shows that fewer are choosing to stay at hotels. The number of foreign overnight stays has increased from 7.06 million in 2019 to 7.6 million in 2024; this growth of eight per cent corresponds to about 582,000 more overnight stays at hotels.

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

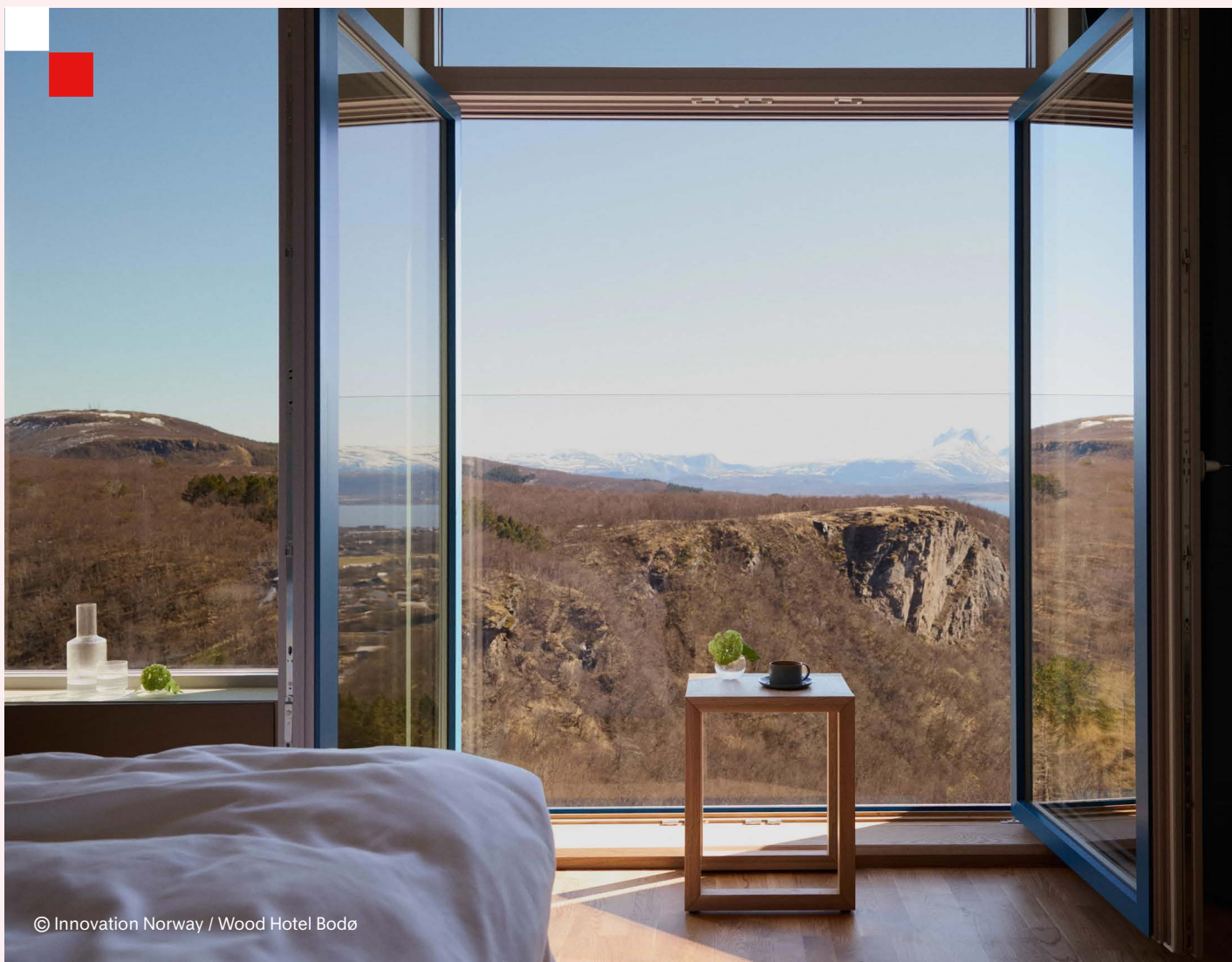
The proportion of holidaymakers who have specified the type of accommodation



Source: The Tourism Survey, Innovation Norway

05

Commercial overnight stays

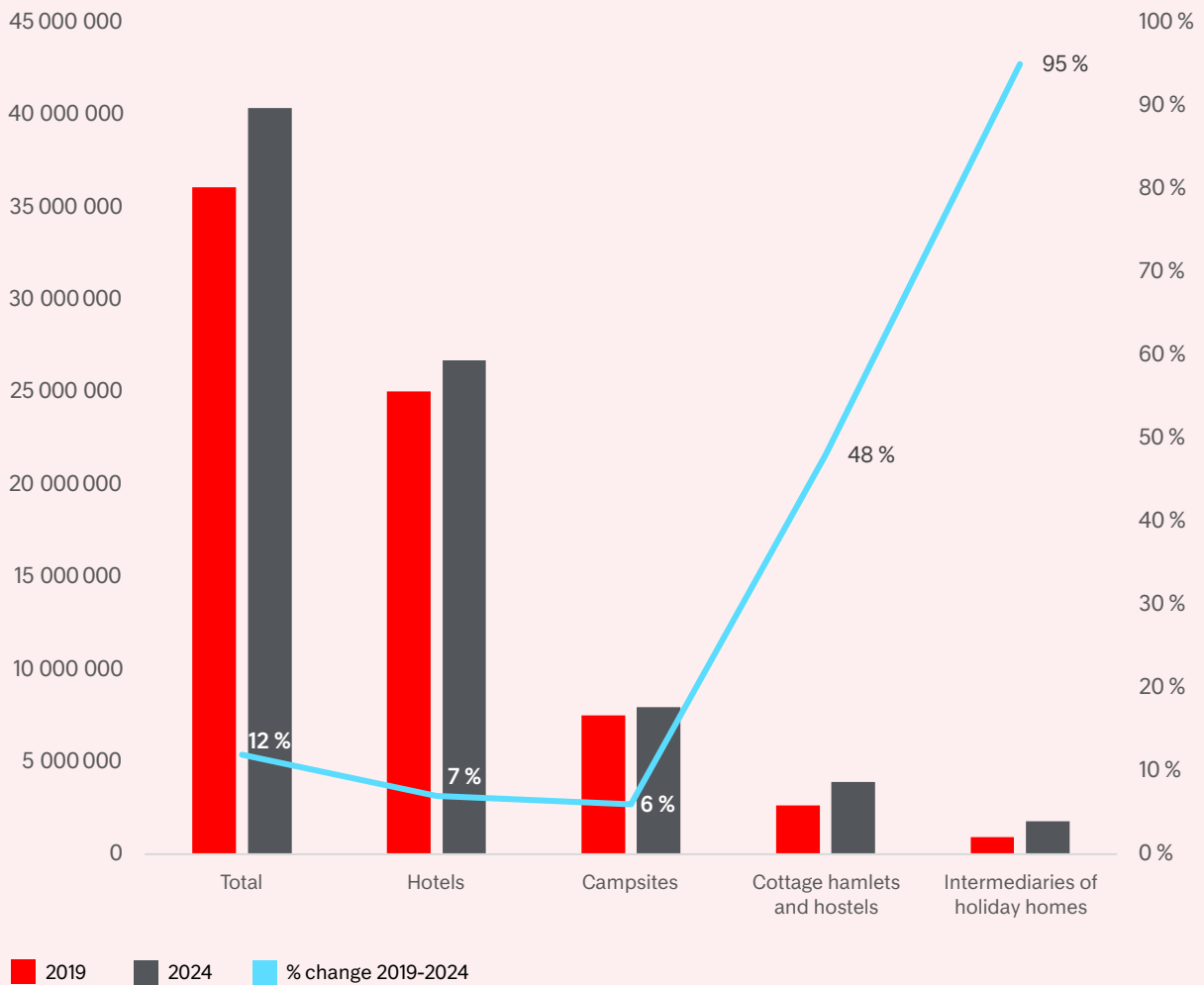


Strong growth also in recorded types of overnight stays

In 2024, there were 40.4 million overnight stays with commercial accommodation and via Norwegian holiday home providers. This is an increase of twelve per cent compared to 2019, equivalent to 4.3

million more overnight stays. Just from 2023, the number of recorded overnight stays has increased from 38.6 to 40.4 million, which is an increase of 1.79 million in the space of a year.

Distribution of commercial overnight stays and overnight stays through holiday home providers



Source: Statistics Norway

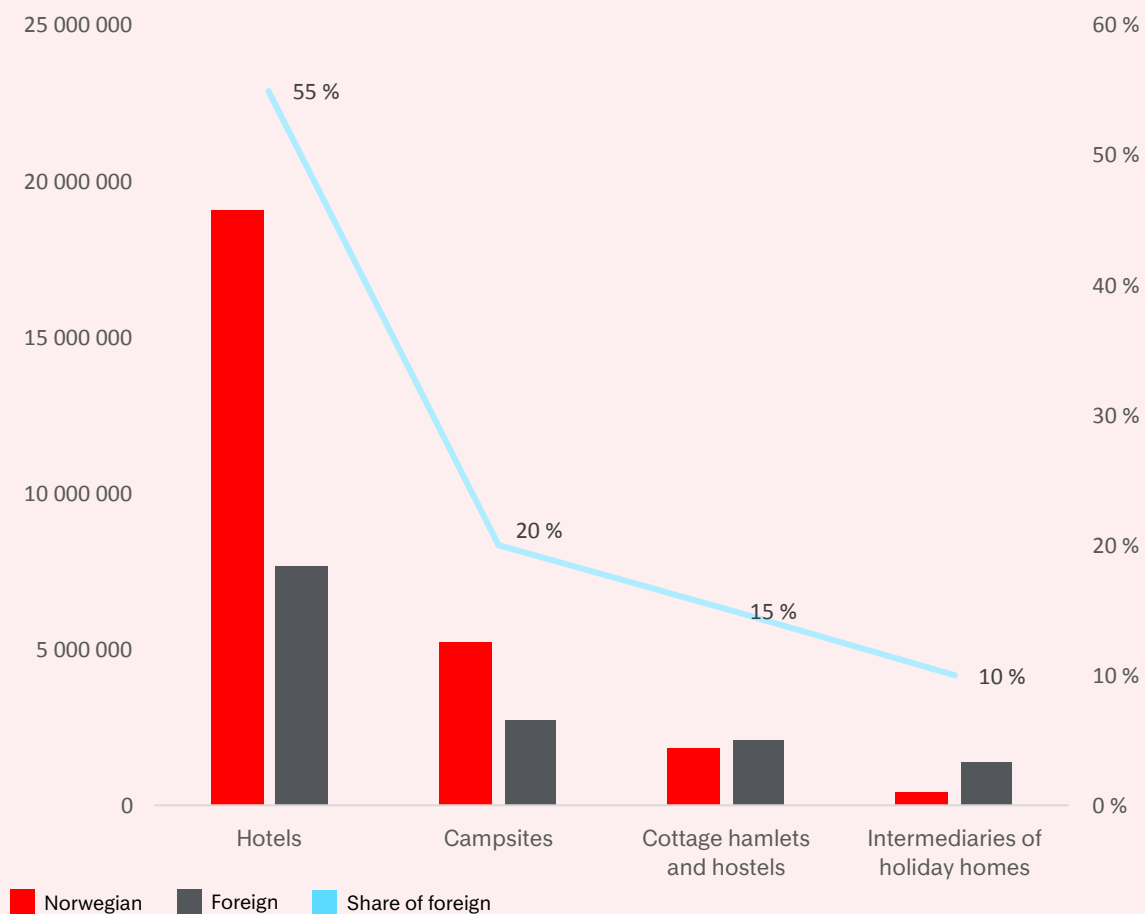
Commercial accommodation and overnight stays through holiday home providers are those shown in the official statistics of the number of overnight stays in Norway. Calculations from the Tourism Survey of overnight stays outside of the official statistics are also included, as shown on the preceding pages.

In 2024, there were 40.4 million overnight stays with commercial accommodation and via Norwegian holiday home providers. This is an increase of twelve per cent compared to 2019, equivalent to 4.3 million more overnight stays. Just from 2023, the number of recorded overnight stays has increased from 38.6 to 40.4 million, which is an increase of 1.79 million in the space of a year.

Growth from 2019 to 2024 has gone to hotels and cabin villages

The growth of 4.3 million more overnight stays from 2019 is distributed across a number of different accommodation options, but 40 per cent of the growth, representing a growth of 1.7 million has gone to hotels, 30 per cent has gone to cabin villages and hostels, 20 per cent to cabin providers and 10 per cent to camping. The fact that 60 per cent of the growth has gone to other types of overnight stay than hotels, means that the number of hotel overnight stays has gone from 69 per cent in 2019 to 66 per cent in 2024.

Commercial overnight stays and overnight stays through holiday home providers



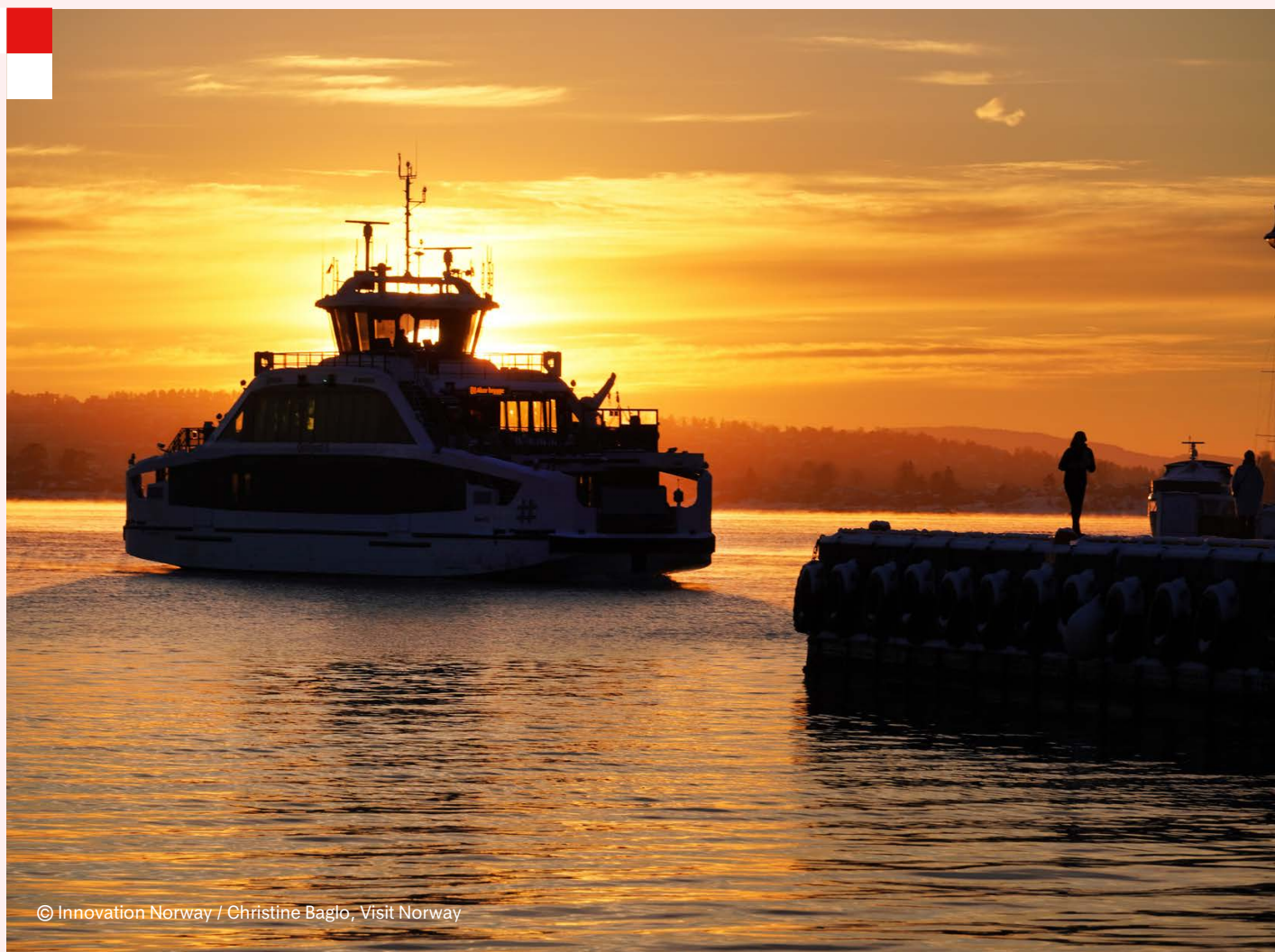
Source: Statistics Norway

Germany continues to strengthen its position

For many years, Germany has been the largest foreign market for Norwegian tourism, and this remains the case in 2024.

With a total of 2.8 million overnight stays at hotels, campsites, hostels, cabin villages and via Norwegian holiday home providers, Germany is the largest foreign market. Furthermore, Germany is the largest market measured by cruise passengers, which is discussed further on the chapter on cruise tourism. Furthermore, the Tourism Survey shows us that many Germans utilise accommodation that is not included in official statistics, particularly campervans outside of campsites.

Measured in commercial overnight stays, the United States is the second largest market, but if we include overnight stays through holiday home providers, Sweden is the next largest with 1.5 million overnight stays. The top markets are the same as in 2019, with significant markets being Germany, the United States, Sweden, the Netherlands, Denmark and the United Kingdom. Together, these represented a 57 per cent share in 2019 and 61 per cent in 2024.



Good growth from the vast majority of markets

From 2024-2025, there was good growth from the majority of markets in the table below, with the exception of decreases from the Netherlands, Belgium and, unsurprisingly, Russia. Arrivals from Europe increased in 2023, but 2024 is the first time we have seen good development from more overseas markets beyond the United States. China

was the largest Asian market in 2024, with 219,700 overnight stays. This is a whole 143 per cent more than the previous year, but still half of that in 2019. This good growth from outside of Europe means that the proportion of overnight stays has gone from 19 per cent in 2023 to 21 per cent in 2023. See the overview on page x



Commercial overnight stays

	2019	Share in 2019	2020	2021	2022	2023	2024	Share in 2024	Change 2023-2024	Change 2019-2024
Total	35,179,554	100%	23,720,833	27,092,046	36,127,194	37,044,492	38,587,930	100%	4%	10%
Norway	24,478,073	70%	20,402,530	23,782,515	26,313,965	25,907,064	26,162,501	68%	1%	7%
Total foreign visitors	10,701,481	30%	3,318,303	3,309,531	9,813,229	11,137,428	12,425,429	32%	12%	16%
Germany	1,955,111	18%	565,953	788,659	2,213,667	2,300,749	2,423,756	20%	5%	24%
USA	956,174	9%	203,954	211,696	819,080	1,109,159	1,325,349	11%	19%	39%
Sweden	1,103,425	10%	397,600	376,801	996,498	1,098,202	1,230,241	10%	12%	11%
The Netherlands	773,696	7%	171,852	217,594	1,056,754	1,018,928	911,930	7%	-11%	18%
Denmark	755,652	7%	589,832	262,335	830,456	825,675	860,582	7%	4%	14%
UK	649,981	6%	288,742	179,954	567,273	677,195	776,631	6%	15%	19%
France	451,608	4%	65,530	114,200	461,000	499,152	551,427	4%	10%	22%
Switzerland	243,469	2%	43,380	57,178	267,826	322,008	349,074	3%	8%	43%
Spain	343,513	3%	43,286	70,186	267,916	308,466	344,779	3%	12%	0%
Italy	273,372	3%	65,730	101,058	265,617	288,373	348,330	3%	21%	27%
Belgium	160,179	1%	27,845	48,978	192,687	233,524	228,064	2%	-2%	42%
China	112,522	4%	23,402	37,288	118,856	134,212	219,674	1%	143%	-53%
Australia	125,339	1%	22,041	4,052	54,115	115,147	143,413	1%	25%	14%
Austria	471,822	1%	27,614	6,135	25,146	90,472	141,363	1%	5%	26%
India	104,339	1%	5,670	749	22,365	75,340	95,695	1%	52%	-10%
South Korea	57,935	1%	8,993	3,871	46,904	65,196	85,187	1%	13%	-18%
Canada	106,608	1%	27,152	13,661	41,295	62,851	81,672	1%	25%	41%
Singapore	38,623	0%	6,190	1,286	24,614	47,531	69,791	0%	47%	81%
Taiwan	40,068	0%	3,345	3,748	35,088	46,625	60,967	0%	85%	24%
Brazil	50,726	0%	11,001	4,516	30,326	43,666	55,585	0%	27%	10%
Thailand	53,132	0%	10,931	2,790	15,118	33,110	51,221	0%	55%	-4%
United Arab Emirates	49,079	0%	4,325	194	5,103	32,991	48,323	0%	4%	21%
Japan	100,283	1%	8,833	4,807	14,819	32,704	46,276	0%	41%	-54%
Malaysia	24,238	0%	4,115	1,110	9,840	20,616	24,767	0%	20%	2%
Mexico	154,189	0%	19,033	16,401	20,711	17,339	24,441	0%	41%	61%
Qatar	15,138	0%	3,071	2,560	12,316	17,297	17,643	0%	32%	29%
Indonesia	25,140	0%	3,996	969	6,471	13,638	16,366	0%	20%	-35%
Russia	13,669	1%	4,781	5,602	12,581	13,350	10,090	0%	-42%	-93%
Other countries	1,492,451	14%	660,106	771,153	1,378,787	1,593,912	1,882,792	15%	18%	26%

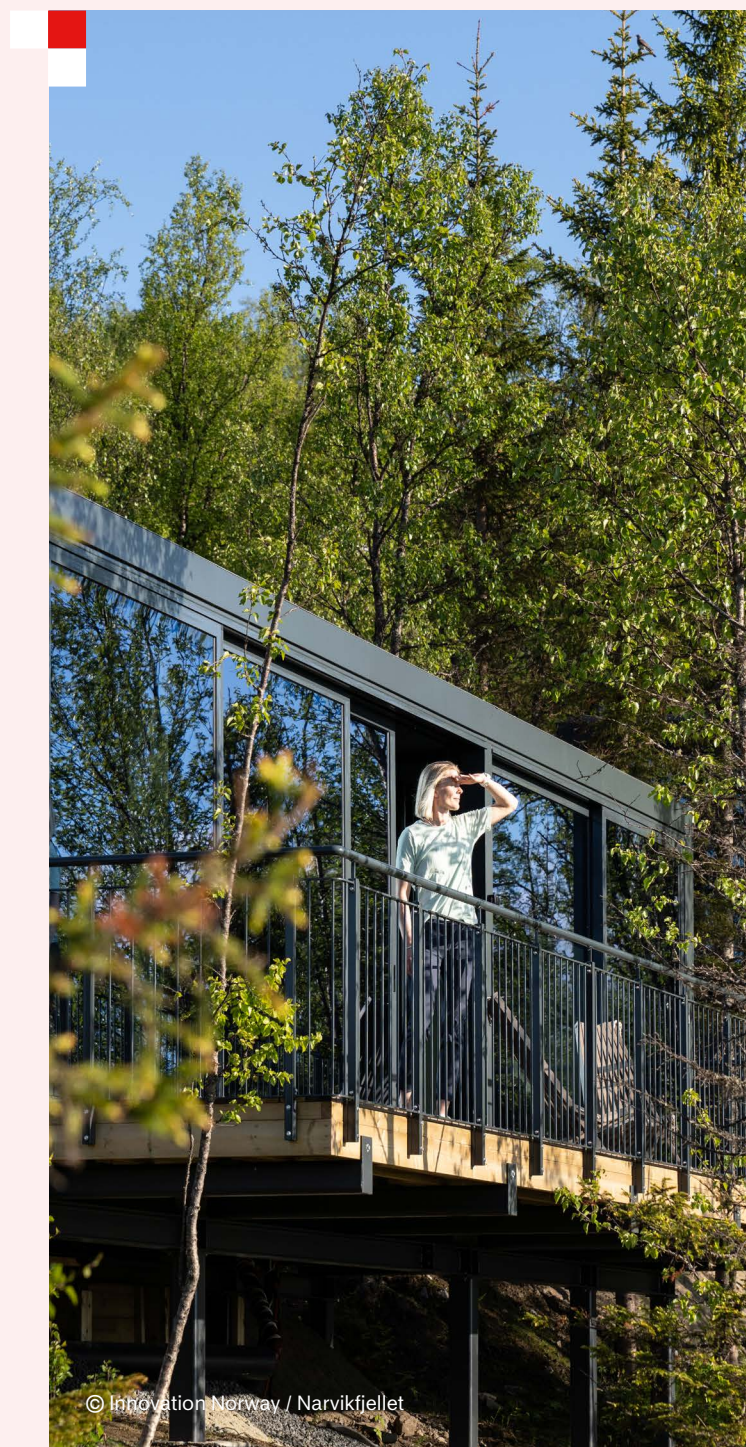
Source: Statistics Norway

Overnight stays via Norwegian holiday home providers

In 2024, there were 1.8 million overnight stays via Norwegian holiday home providers. This is double that of 2019 and the majority of these overnight stays are from Danes, Norwegians, Germans and Swedes.

	2019	2024	% change	Share in 2024
Total	924,301	1,800,608	95%	100%
Total foreign visitors	767,712	1,363,127	78%	76%
Denmark	242,730	473,528	95%	26%
Norway	156,589	437,481	179%	24%
Germany	229,459	388,260	69%	22%
Sweden	186,151	301,967	62%	17%
The Netherlands	37,141	60,681	63%	3%
UK	14,336	42,510	197%	2%

Source: Statistics Norway

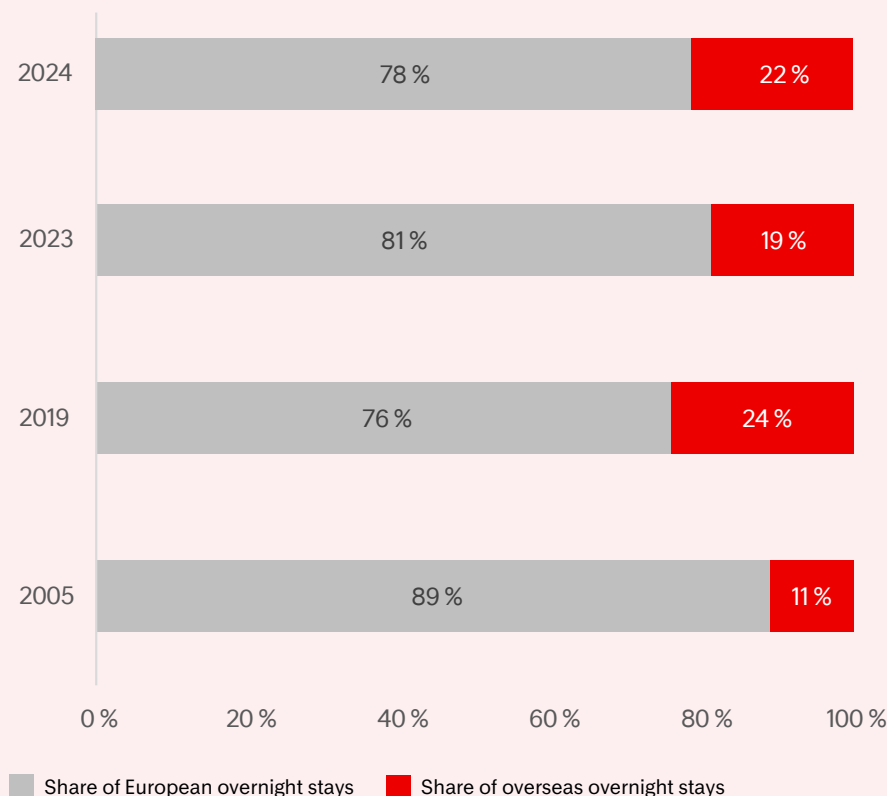


Distribution of overnight stays between European and overseas markets

European countries have always been important for Norwegian tourism, but up to 2019 they were not growing at the same rate as overseas markets, which took an increasingly large share each year. In 2005, the overseas market represented 11 per cent of foreign overnight stays. In 2018, this share had increased to 23 per cent, and in 2019 it was at 24 per cent. However, by 2023 this had dropped to 19 per cent. It is only Americans who have returned to their previous levels. Of the 11.1 million foreign overnight stays that year, 2.1 million came from overseas markets, of which 1.1 million were Americans.

2024 was the year that arrivals from Asia began to increase. Nevertheless, American overnight stays are dominant amongst overseas guests. Of the 2.7 million overseas overnight stays in 2024, 1.3 million were American. This means that American overnight stays represented 49 per cent of all overseas overnight stays this year. There is a large leap down to China, which is the second largest overseas market with just under 220,000 overnight stays.

Share of overnight stays from Europeans and the rest of the world



Source: Statistics Norway

Prioritising holiday travel – business traffic has not returned

Holiday and leisure traffic has also driven growth in 2024

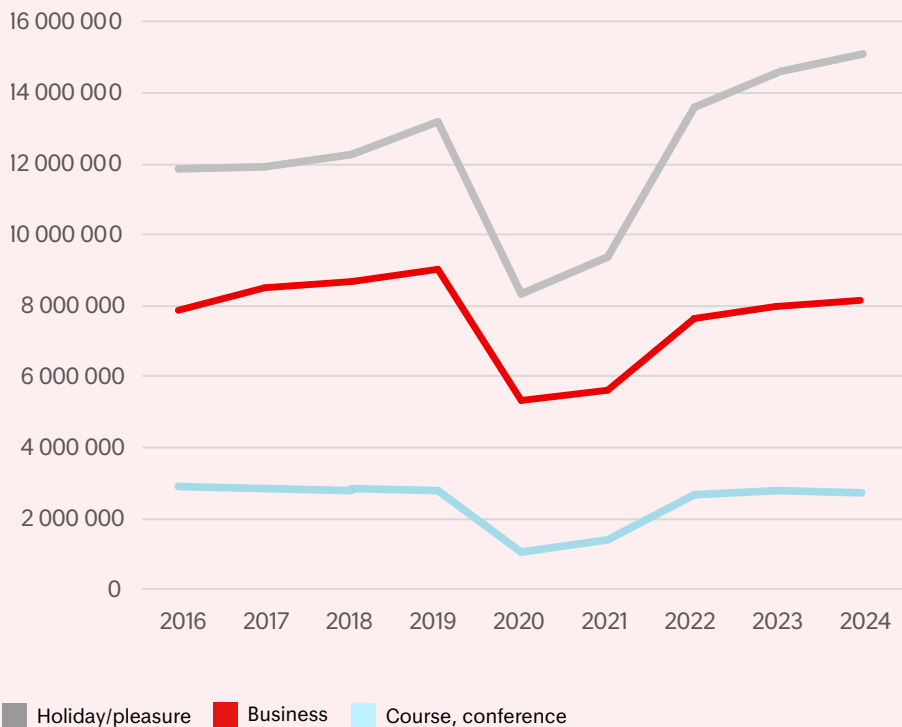
Statistics Norway reports only the purpose of an overnight stay in the hotel statistics. This is not done for overnight stays at campsites, hostels or cabin villages. It can be assumed that the majority of these overnight stays are holiday-related. The hotel statistics show that in 2024 26.7 million overnight stays at hotels were recorded, which is an increase of seven per cent from 2019. The entire growth in the period can be put down to holiday traffic alone, which is 18 per cent higher compared to 2019. Neither overnight business trips (-6 per cent) nor course and conference-related overnight stays (-4 per cent) are

back to their pre-pandemic levels. There also are not as many international congresses in Norway, which you can read more about on page x.

Hotels saw strong growth in both Norwegian and foreign overnight stays

In contrast to 2023, where the number of foreign hotel overnight stays still lagged behind 2019 levels, 2024 has seen strong growth compared to 2019. The number of foreign hotel overnight stays is eight per cent higher and the number for Norwegians is six per cent higher. Compared with 2023, business traffic also increased in 2024, while holiday traffic has increased every year.

Hotel overnight stays by purpose of overnight stay



Source: Statistics Norway

Development and seasonal expansion

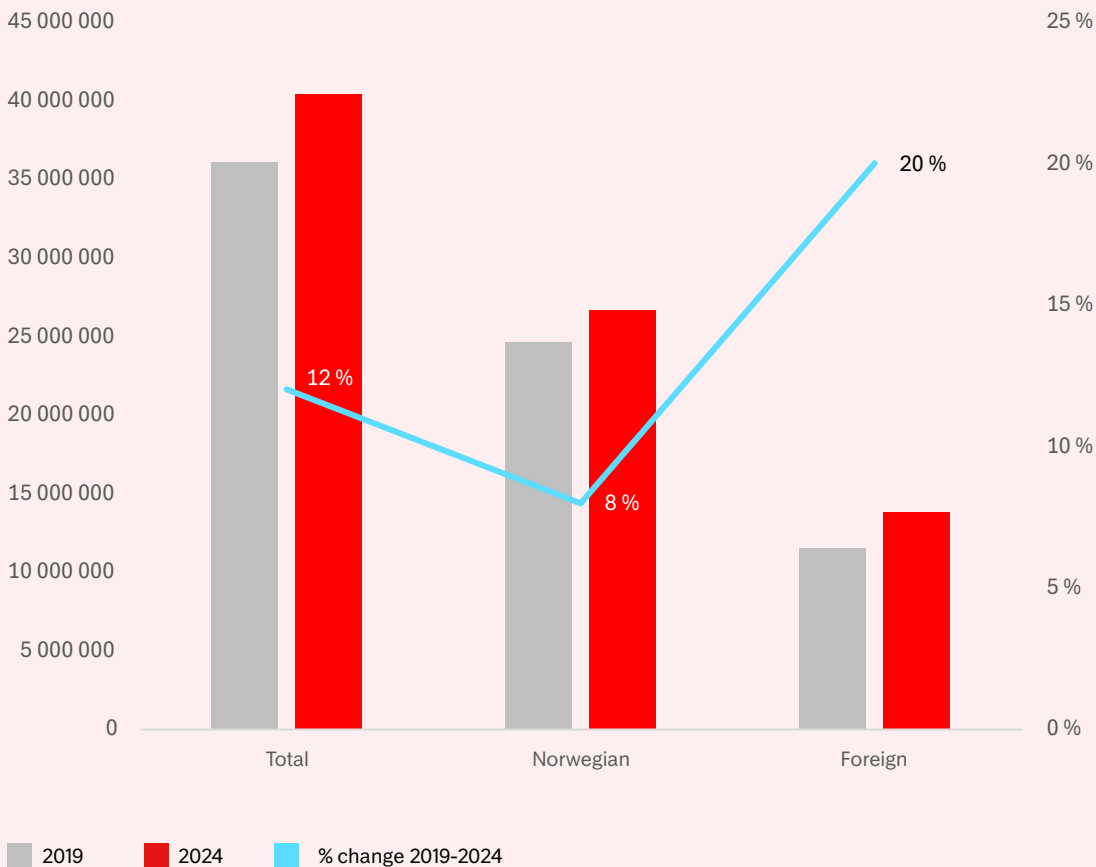
The number of commercial overnight stays via providers has increased from 36.1 million in 2019 to 40.4 million in 2024. This 12 per cent growth corresponds to 4.3 million more overnight stays. The number of Norwegian overnight stays has risen from 24.6 million to 26.6 million, an increase of eight per cent, equivalent to almost two million. At the same time, the number of foreign overnight stays has increased from 11.5 million to just under 13.8

million, which amounts to a growth of 20 per cent, or 2.3 million overnight stays during the period.

Foreign share strengthening

Despite the fact that Norwegian overnight stays still make up the majority, relative growth has been greater among foreign guests. As a result, the proportion of Norwegian overnight stays has decreased from 68 per cent in 2019 to 66 per cent in 2024.

Commercial overnight stays and overnight stays through holiday home providers



Source: Statistics Norway

A closer look at foreign overnight stays

Based on the official statistics for Norway, close to 13.8 million foreign overnight stays were recorded in 2024. Of these, hotel overnight stays constituted the largest share, followed by campsites, cabin villages and hostels, as well as overnight stays offered via Norwegian holiday home providers.

Most nights at hotels

The number of foreign hotel overnight stays was 7.6 million in 2024, representing a share of 55 per cent, and 2.7 million, equivalent to 20 per cent, were recorded at campsites. Overnight stays at cabin villages and hostels reached two million in 2024, representing a 20 per cent share. Finally, the number of overnight stays via Norwegian holiday home providers was just under 1.4 million, representing ten per cent of all overnight stays.

Hotel overnight stays dominate

During 2024, 7.6 million foreign hotel overnight stays were recorded, which corresponds to 55 per cent of the total number. Campsites accounted for 2.7 million nights, which amounts to 20 per cent. Overnight stays at cabin villages and hostels totalled two million, equivalent to 15 per cent. Finally, just under 1.4 million overnight stays were

offered through Norwegian holiday home providers, representing ten per cent of the total.

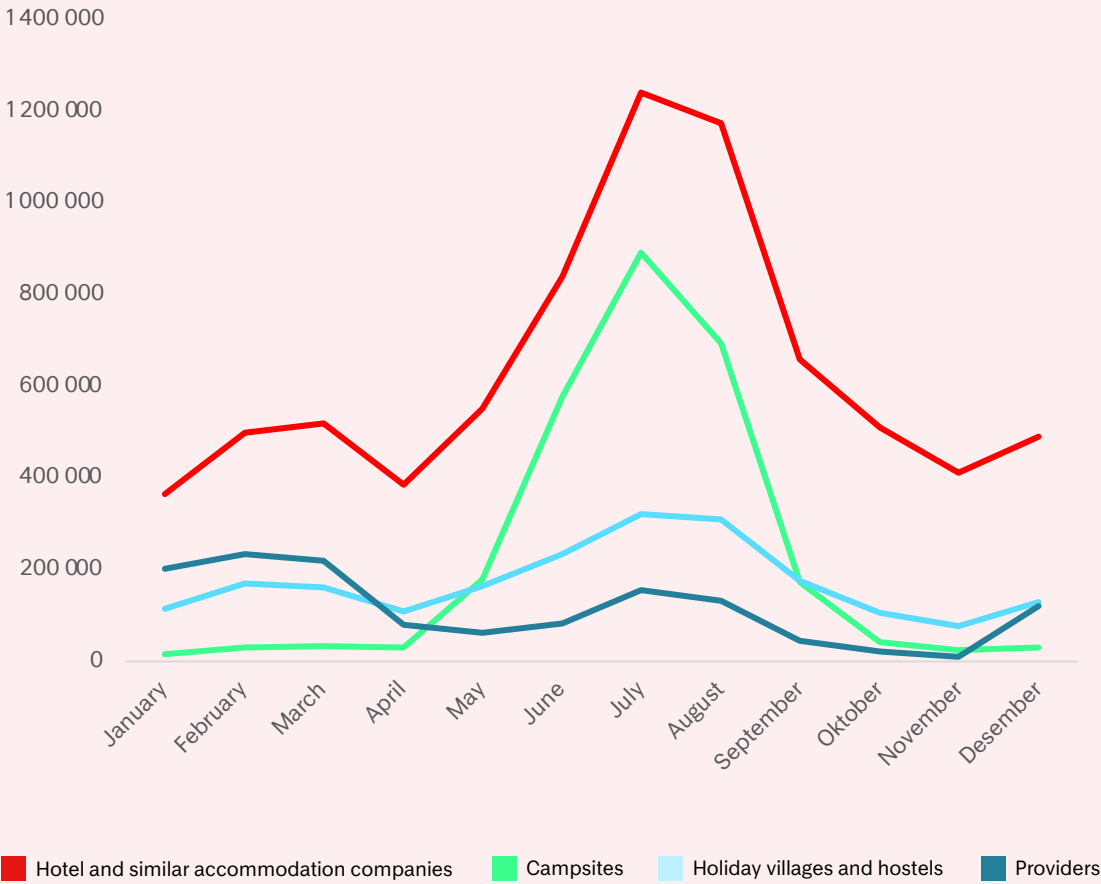
Share of foreign hotel overnight stays declines from 2019

The number of foreigner overnight stays increased from 7 million in 2019 to 7.6 million in 2024; however, the largest increase in the period has been in other types of overnight stay, meaning the proportion of foreign hotel overnight stays has dropped from 66 per cent in 2019 to 55 per cent in 2024.

Decrease in the proportion of foreign hotel overnight stays since 2019

Although the number of foreign overnight stays increased from 7 million in 2019 to 7.6 million in 2024, the largest growth in the period has been seen within other types of overnight stay. This means that the proportion of foreign hotel overnight stays decreased from 66 per cent in 2019 to 55 per cent in 2024.

Foreign overnight stays throughout 2024 by accommodation type, collected by Statistics Norway



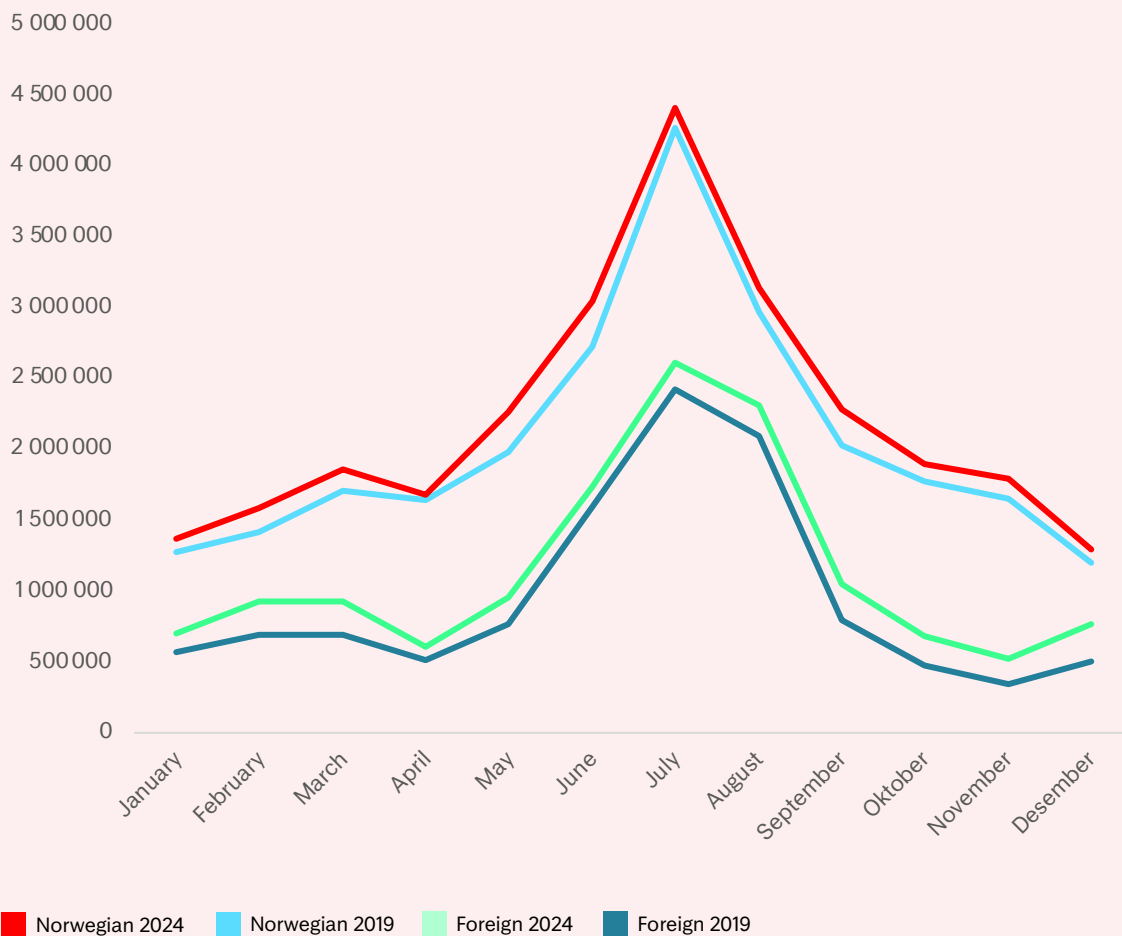
Source: Statistics Norway

Seasonal distribution of commercial overnight stays

Of the total 40.4 million recorded commercial overnight stays by Statistics Norway in 2024, 51 per cent took place during the summer season from May to August. This represents a decrease of one percentage point compared to 2019, when 52 per cent of all overnight stays occurred during this period. If you look at Norwegian overnight stays, 48 per cent were recorded in the summer season of 2024, a level that has remained unchanged since

2019. However, the most notable development is among foreign overnight stays, where the share for the summer season has fallen from 60 per cent in 2019 to 55 per cent in 2024. As illustrated in the graph below, the number of foreign overnight stays has also increased during the summer season, but the strongest growth has taken place outside of the high season. This development has contributed to a more balanced seasonal distribution of overnight stays.

Commercial overnight stays and overnight stays through holiday home providers



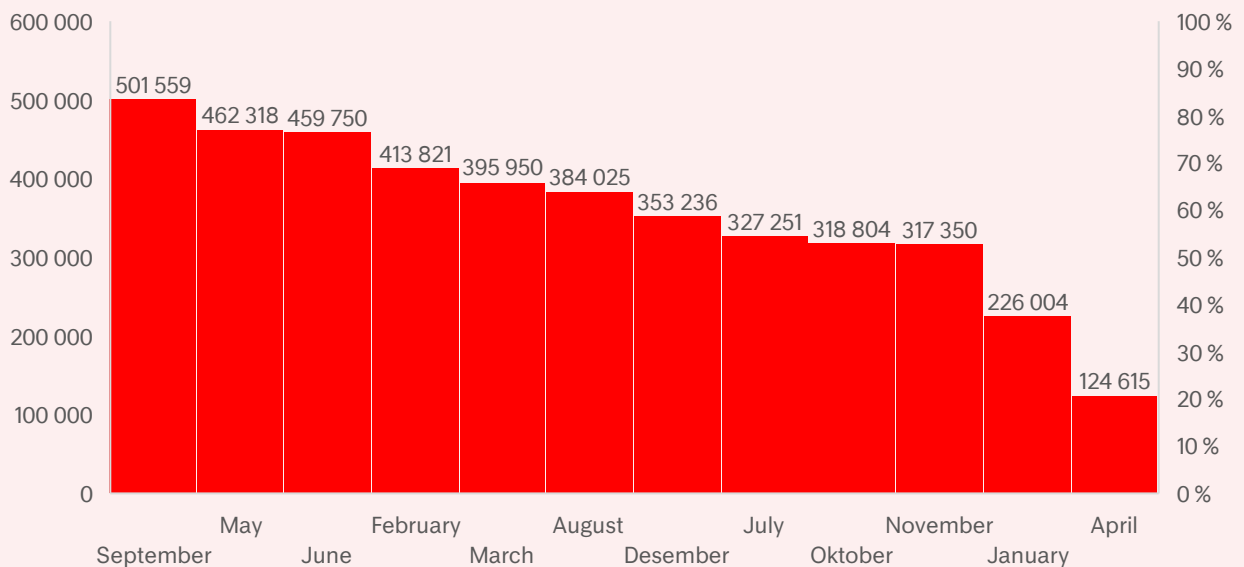
Source: Statistics Norway

Number of recorded overnight stays increased by 4.3 million from 2019 to 2024

The number of recorded overnight stays increased from 36.1 million in 2019 to 40.9 million in 2024. The growth of 4.3 million overnight stays is distributed throughout the year as the graph below shows, with the largest growth being in September, May and June. As of 2023, the number of overnight stays has increased by 1.8 million recorded overnight stays.

Even though the summer season still has the most recorded overnight stays of 2024, the growth is greater at other times of the year. This has resulted in the share of overnight stays in the summer season of May to August decreasing from 52 per cent in 2019 to 51 per cent in 2024. Of the growth of 4.3 million from 2019, 1.6 million were in the period May to August, while 2.7 million were distributed across the remaining months.

Growth in Norwegian and foreign overnight stays in the period 2019-2024 distributed throughout the year



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

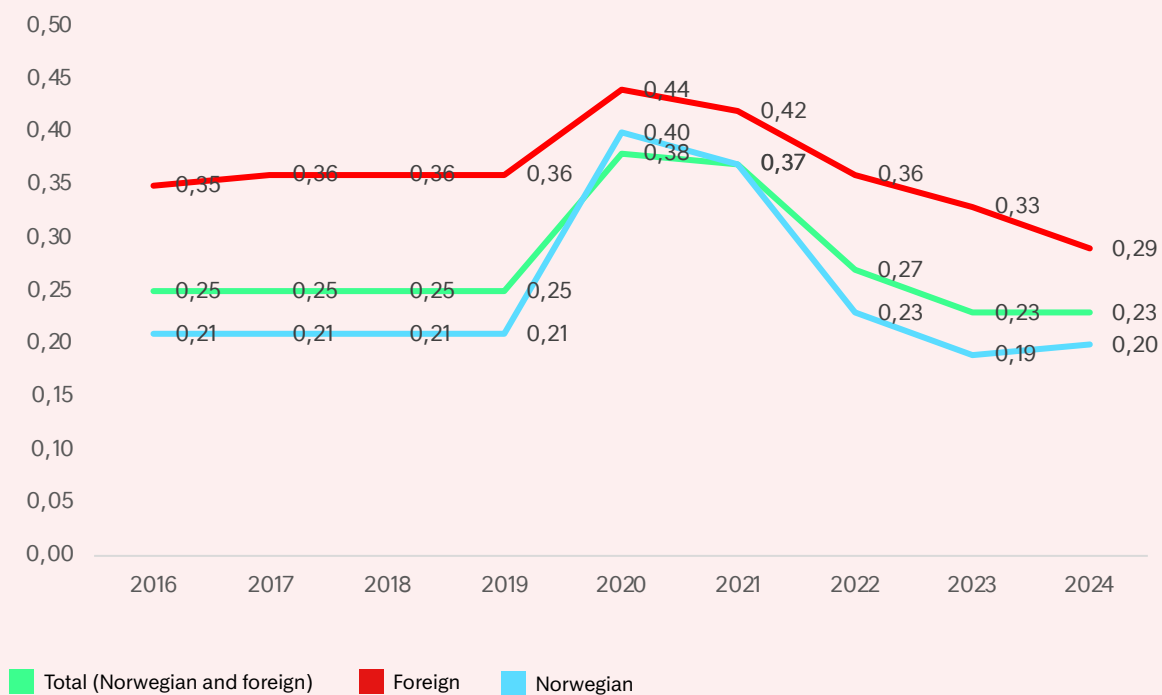
Source: Statistics Norway

Development of the Gini index over time

The Gini index, also known as the Gini coefficient, reached a record low in 2024. With a good growth throughout the year and especially with months with lower numbers of overnight stays, the Gini coefficient for both Norwegian and foreign overnight stays is at a record low. The number of foreign overnight stays are more evenly distributed between the 12 months of the year and has gone from 0.33 in 2023 to 0.29 in 2024. This means that the total for recorded overnight stays in Norway is at a record low of 0.22 in 2024. In the chapter on cruise tourism in Norway, you will also see that the number of cruise passengers is more evenly distributed throughout the year in 2024, compared to 2023.

What do these numbers mean?
 The closer to zero the better! The Gini index, or Gini coefficient, is a statistical measurement of distribution, expressed as a value from 0 to 1. If a destination, or country, has an equal number of overnight stays or cruise tourists every month throughout the year, the value will be zero. The goal is to achieve as low a value as possible.

Gini index for commercial overnight stays and overnight stays from holiday home providers



Source: Statistics Norway and Innovation Norway

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

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

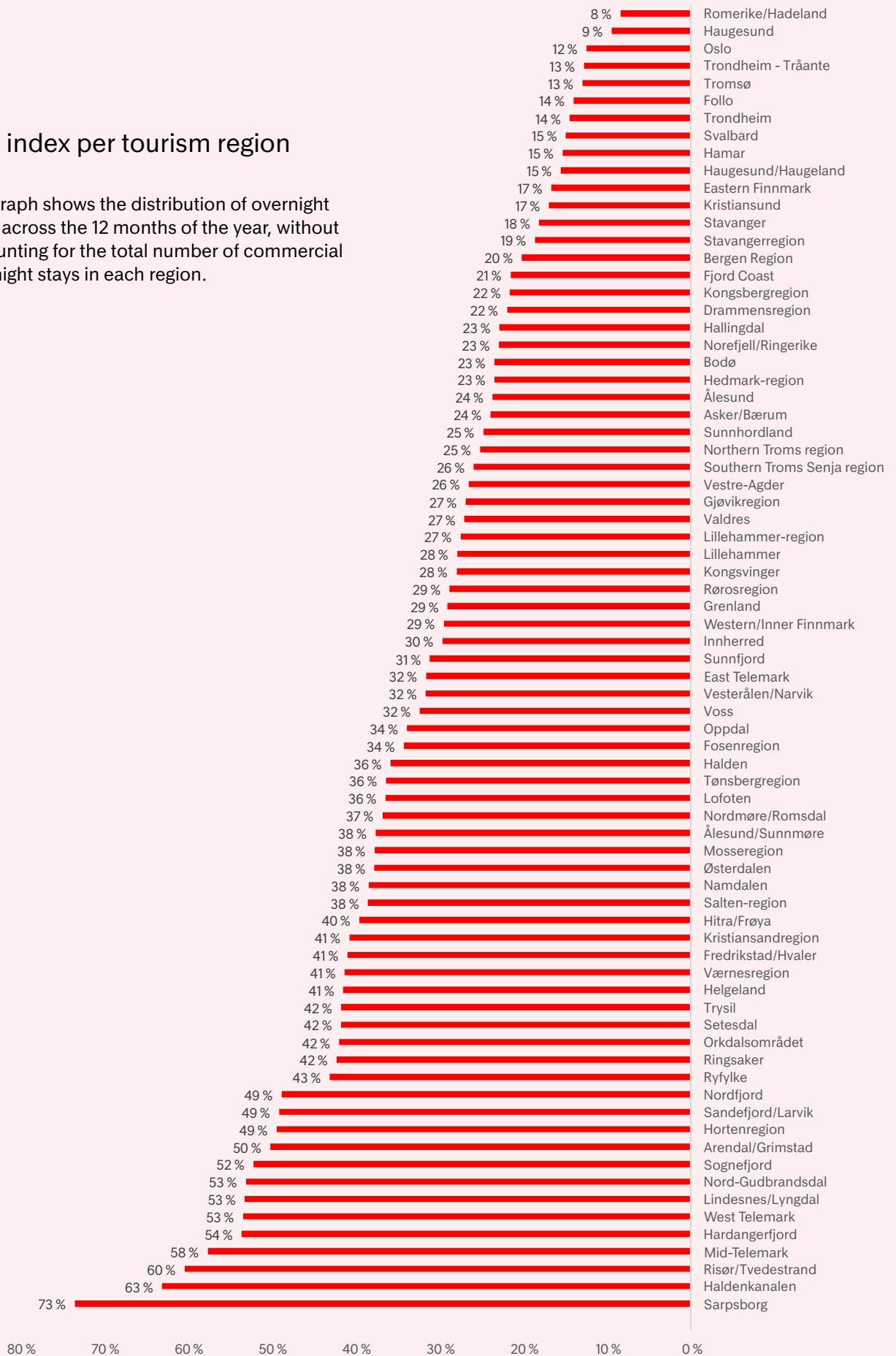
The Romerike/Hadeland region stands out as the tourism region with the most equal distribution of commercial overnight stays through 2024, with an index score of 8. This is closely followed by Haugesund, Oslo, Tromsø, Follo, Trondheim, Svalbard, Hamar, the tourism region of Haugesund/

Haugeland, East Finnmark, Kristiansund, Stavanger and the Bergen region. The graph shows the distribution of overnight stays across the year, and nothing if there are many or few overnight stays. As such the graph on page x shows a collection of cities and tourism regions with the number of overnight stays during 2024 and the distribution of these. Oslo and Bergen have done the best, with Oslo with 6.7 million overnight stays and Bergen with 3 million having the most even distribution over the year.



Gini index per tourism region

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



Source: Statistics Norway and Innovation Norway

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

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

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

Seasonal fluctuation and overnight stays per tourism region and city



Source: Statistics Norway and Innovation Norway

A closer look at the distribution of overnight stays from different markets

As the previous pages show, the number of overnight stays has increased by 2.3 million in 2024 compared to 2019.

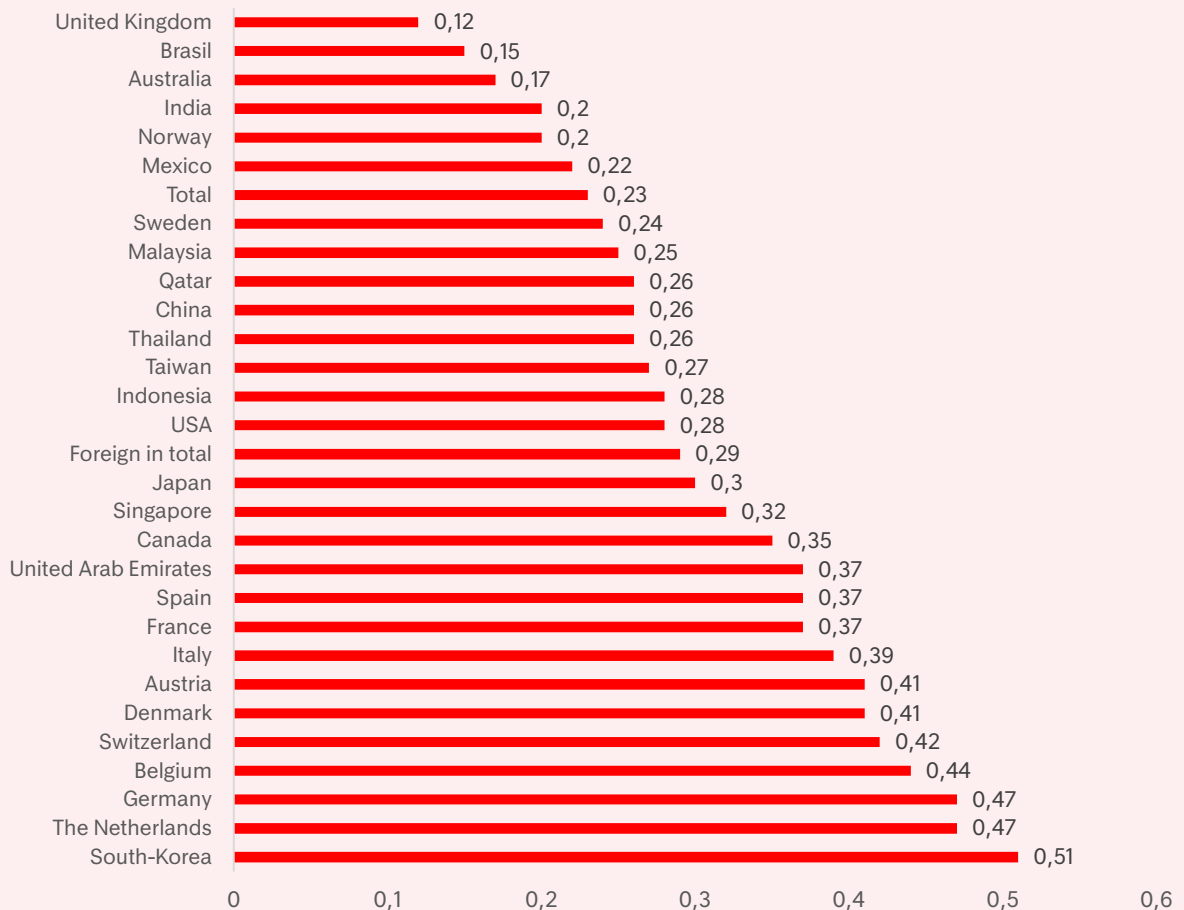
Good growth throughout the year

Of the growth of 2.3 million more overnight stays, just under 719,000 were in the summer months of May to August, representing 31 per cent of growth. The rest is spread throughout the year. There is differentiation in how overnight stays from different markets are spread throughout the year. Some markets come primarily in the summer season, but the UK stands out with good seasonal expansion. Brits come to

Norway in the summer and they visit the country in the winter to ski or to experience the Northern Lights.

The graph does not show how many overnight stays there are for each market, but instead how the overnight stays in Norway are spread throughout the 12 months of the year. The UK represents our sixth largest international market with its share of six per cent in 2024 and is the market that achieves the most even distribution of overnight stays over the course of the year with a score of 0.12. At the other end of the scale, we find Germany with a score of 0.47, which is the largest market with 2.3 million commercial nights, constituting a 20 per cent share.

Gini index per market



Source: Statistics Norway and Innovation Norway

06

Characteristics of holidaymakers



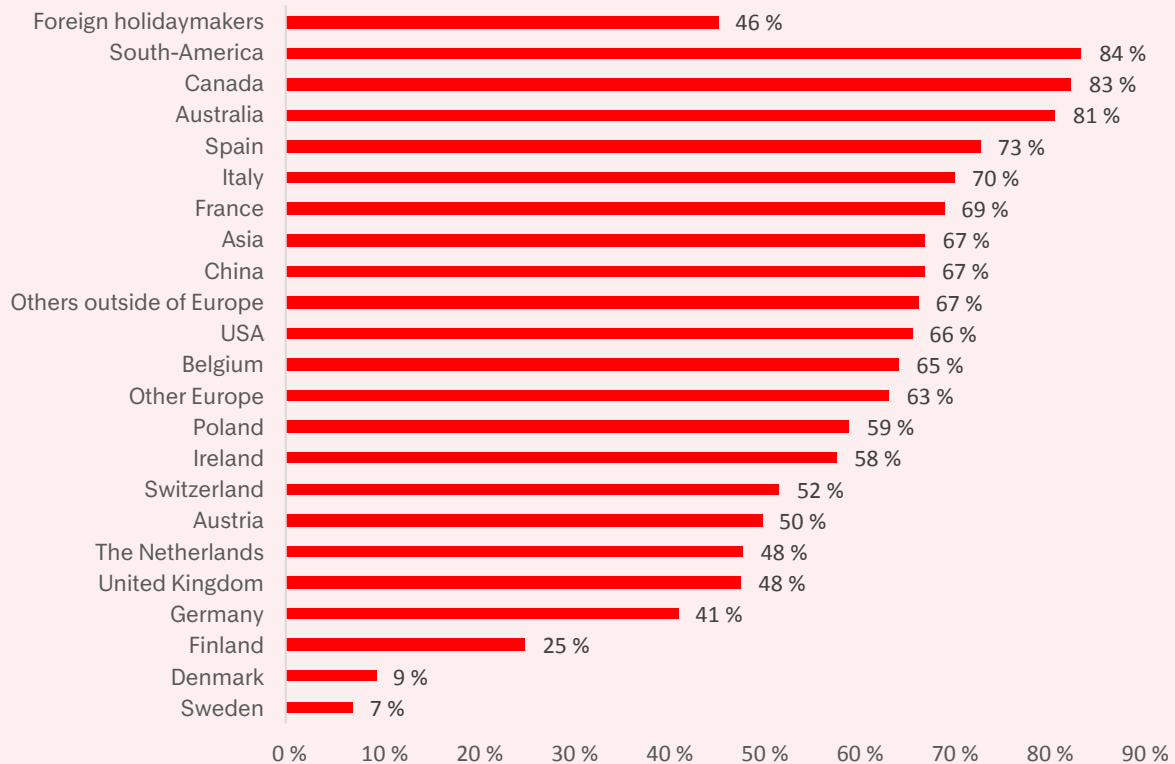
Norway has a good mixture of return visitors and first-time visitors.

Just over half of the holidaymakers in 2024 had visited the country before

According to the Tourism Survey, 46 per cent of holidaymakers in 2024 were first-time visitors. This relationship between new and return visitors has remained stable compared to both 2023 and 2019. In 2024, Northern Norway, Oslo and Western Norway had the highest proportion of first-time visitors, while the Eastern Norway region had a large proportion of return visitors, particularly amongst ski tourists. Of these ski tourists, only 39 per cent were on holiday in Norway for the first time, with a particularly high proportion of return visitors from

Denmark and Sweden. Only three per cent of the Swedish ski tourists and eleven per cent of the Danish ski tourists were visiting Norway for the first time, while French ski tourists made up the largest group of new visitors, with 79 per cent being first-time travellers. Around 40 per cent of ski tourists from Britain and Germany were on their first visit. The tourist group consisted the most of first-time visitors was Northern Lights tourists in the winter. Of these, 62 per cent were in Norway for the first time.

Share of first-time visitors in 2024



Source: The Tourism Survey, Innovation Norway

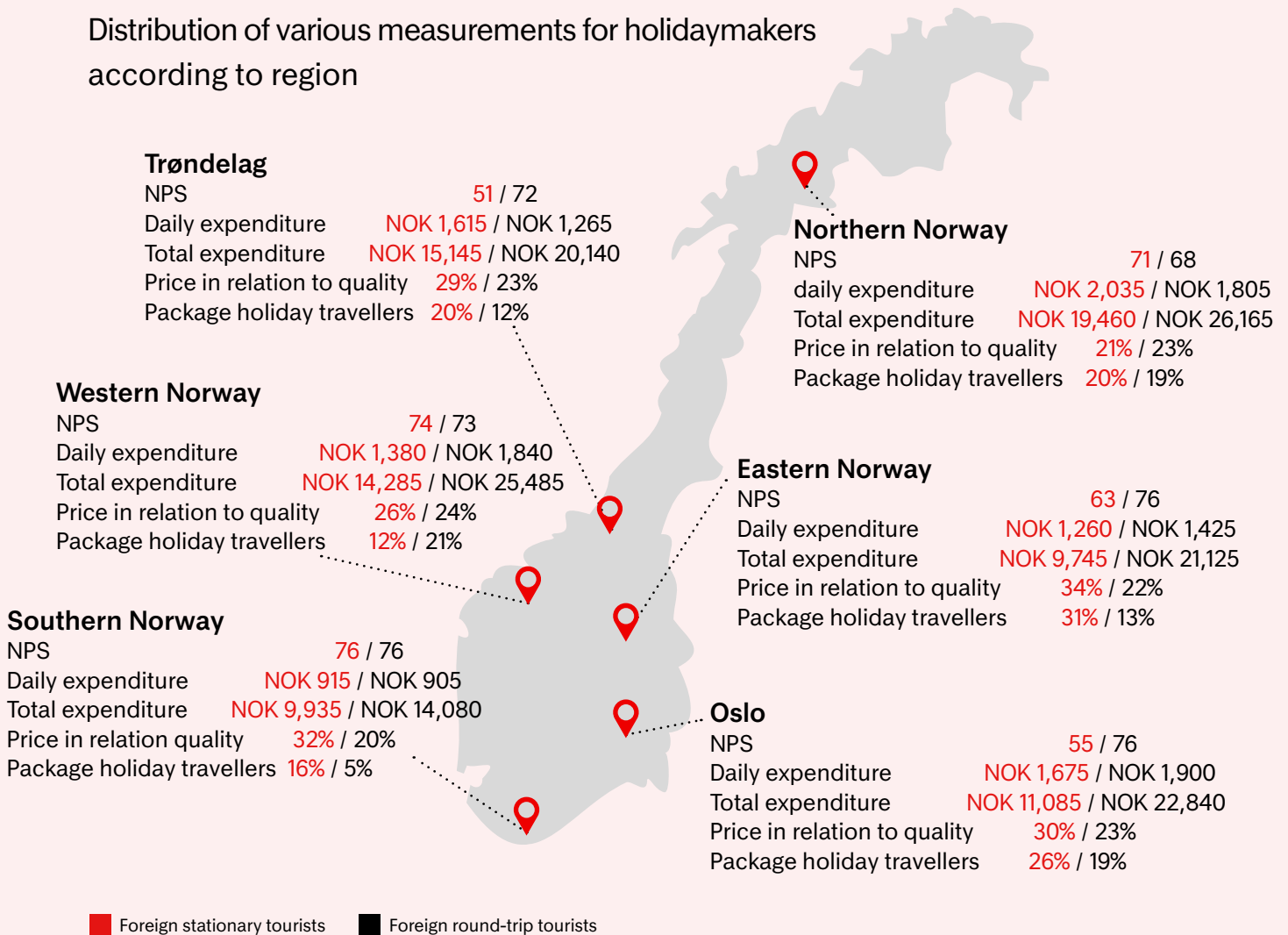
Stationary and round-trip tourists in the regions

For the tourists who have visited Trøndelag, Eastern Norway and Oslo, there are major differences in the willingness to recommend (NPS) of the stationary tourists and round-trip tourists. This is largely due to the fact that there are many stationary tourists from Scandinavia.

The tourists who visit Southern Norway have the highest NPS score, but have the lowest daily expenditure.

The tourists based in Northern Norway have the highest daily expenditure and are very willing to recommend Norway. They are, to a higher degree, in Norway for the first time and 7 out of 10 arrived by plane.

Distribution of various measurements for holidaymakers according to region



Most first-time visitors in Northern Norway, Oslo and Western Norway

There is a much larger proportion of first-time visitors among round-trip tourists than stationary tourists in all regions except Northern Norway, where there is a roughly equal distribution.

6 out of 10 people who stay in Oslo as part of a round trip were in Norway for the first time. The

proportion staying at hotels was highest in Oslo and Northern Norway.

Tourists using Oslo or Northern Norway as their base are younger than average, and tourists visiting Southern Norway and Western Norway are the oldest.

Distribution per region

Trøndelag

Aeroplane to Norway 56% / 32%
 Share of overnight stays at hotels 31% / 27%
 Non-commercial overnight stays 20% / 23%
 First-time visitors 39% / 45%
 Average age 42 / 47

Western Norway

Aeroplane to Norway 36% / 56%
 Share of overnight stays at hotels 26% / 31%
 Non-commercial overnight stays 19% / 18%
 First-time visitors 48% / 54%
 Average age 45 / 47

Southern Norway

Aeroplane to Norway 9% / 10%
 Share of overnight stays at hotels 13% / 14%
 Non-commercial overnight stays 28% / 24%
 First-time visitors 27% / 49%
 Average age 47 / 47

Northern Norway

Aeroplane to Norway 71% / 56%
 Share of overnight stays at hotels 42% / 35%
 Non-commercial overnight stays 18% / 19%
 First-time visitors 53% / 54%
 Average age 41 / 46

Eastern Norway

Aeroplane to Norway 25% / 27%
 Share of overnight stays at hotels 20% / 21%
 Non-commercial overnight stays 22% / 24%
 First-time visitors 21% / 49%
 Average age 43 / 46

Oslo

Aeroplane to Norway 64% / 58%
 Share of overnight stays at hotels 42% / 39%
 Non-commercial overnight stays 46% / 19%
 First-time visitors 44% / 60%
 Average age 39 / 46

■ Foreign stationary tourists ■ Foreign round-trip tourists

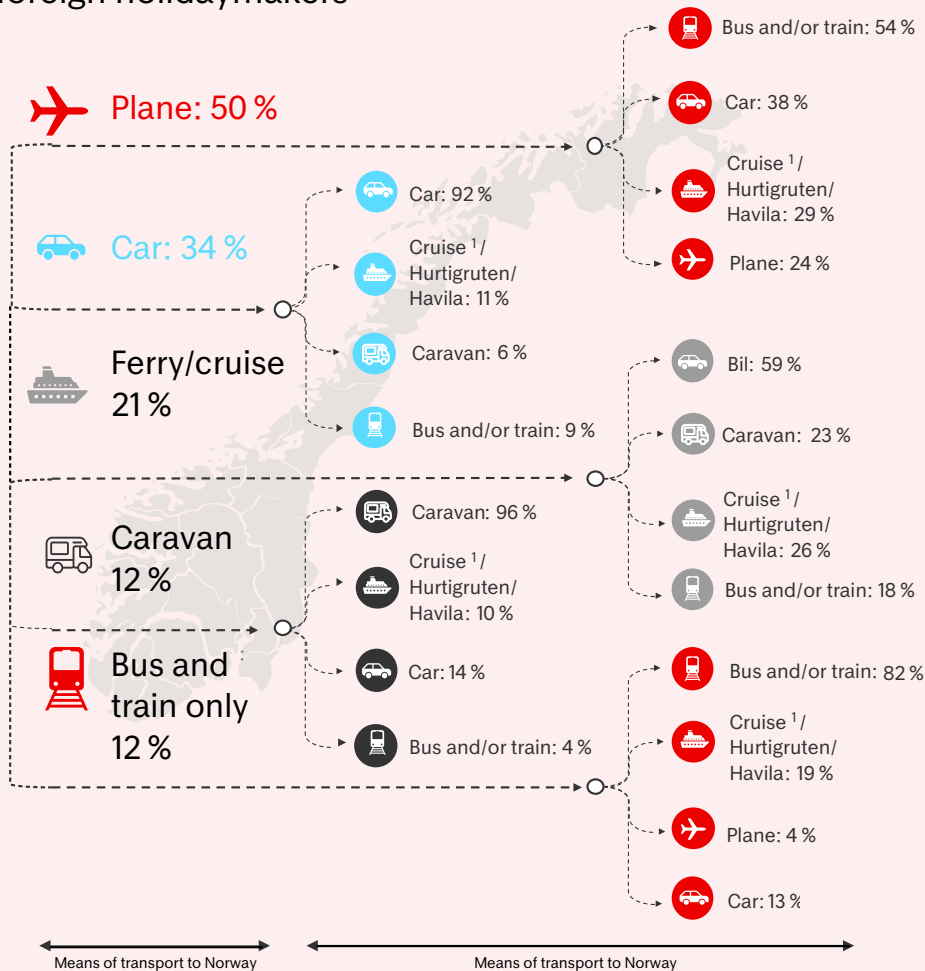
Half of arrivals are by aeroplane

Even though most people arrive by aeroplane, there are increasing numbers coming by car and campervan than before the pandemic. This is due in particular to the greater increase in German tourists than tourists from other countries since the pandemic, and the proportion coming from overseas markets having gone down. Six per cent arrive by only bus or train, meaning that they do not combine their travel with, for example, aeroplanes. These tourists also use buses and trains to a far greater extent on their trip to Norway.

More using buses and trains outside of the summer season

The proportion of people using planes on their holiday to and within Norway is higher outside of the summer season. The same is true of the proportion using trains and buses. Danes and Swedes on skiing holidays in particular are responsible for pushing up the proportion of people using a car in the winter.

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



NB: It is possible to choose multiple modes of transportation if more than one means of transport has been used during the journey to and within Norway. Therefore, the numbers add up to more than 100 per cent. 'Car' includes petrol/diesel car, hybrid car and electric car. 'Ferries' include Color Line, Fjordline and other ferry/cruise lines, while the category 'bus or train only' covers those who have only used buses and/or trains on their trip to Norway. The category 'Cruise' only includes cruise tourists who have at least half of their overnight stays on land in Norway.

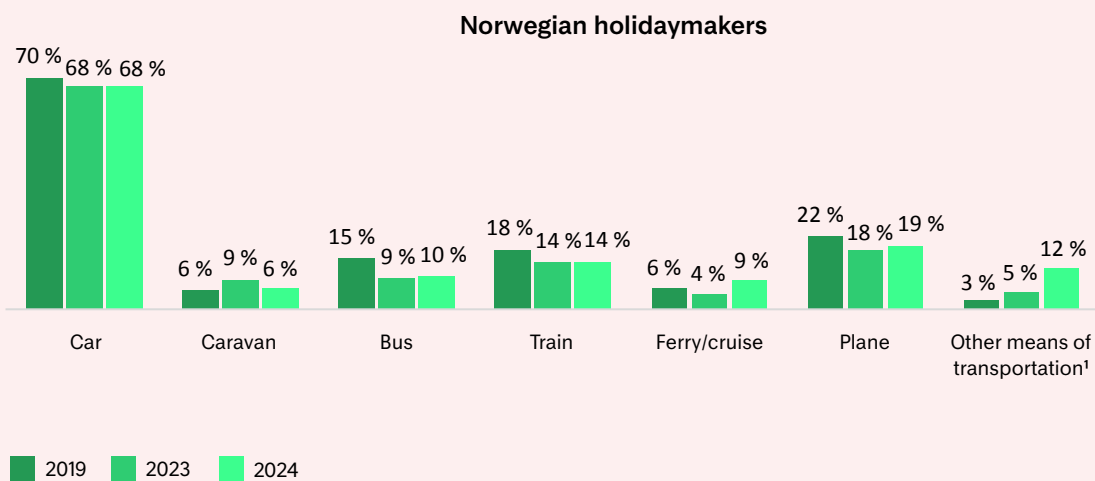
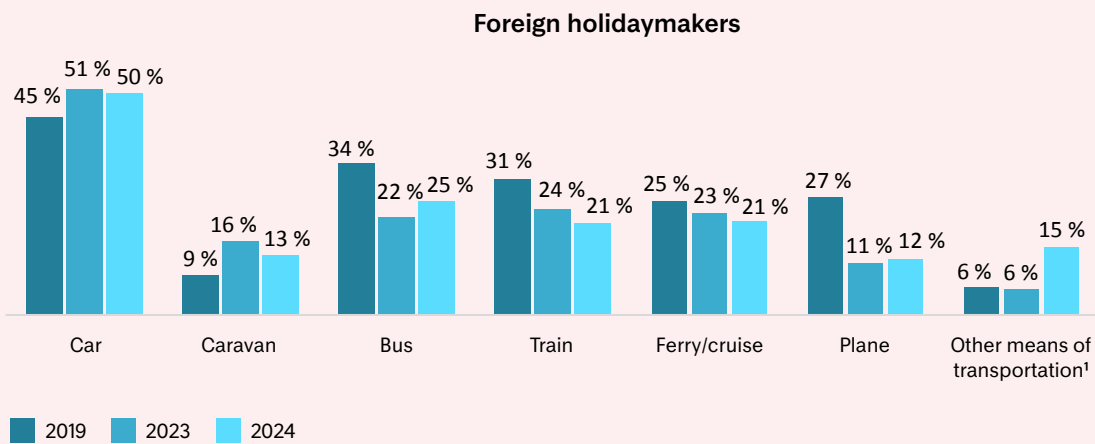
More in cars/campervans and fewer by aeroplane than before the pandemic

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.

This is primarily due to a larger proportion of tourists coming from Germany, the Netherlands, Belgium, Switzerland and Austria, and a smaller proportion coming from Asia, the United States and other countries outside Europe.

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

The proportion of holidaymakers who have specified their mode of transport



¹The 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.

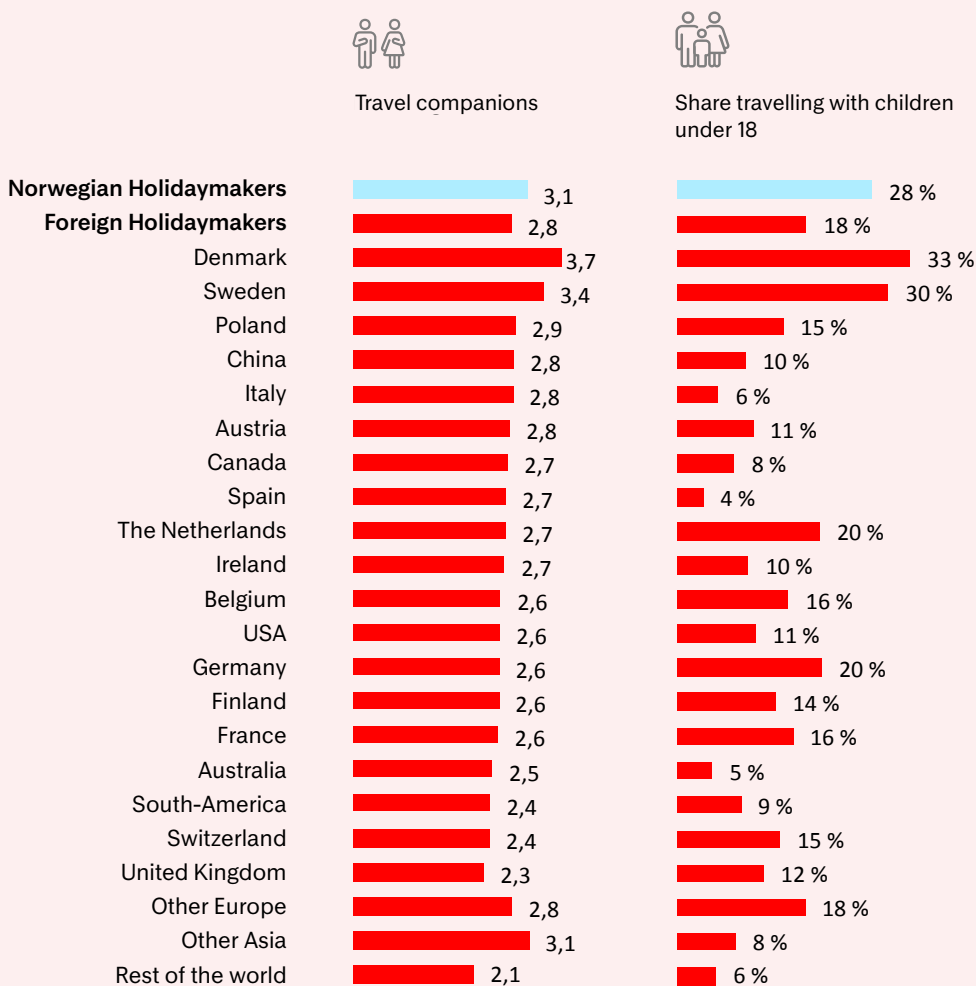
Source: The Tourism Survey, Innovation Norway

Swedes and Danes travel together the most

Swedish and Danish travellers differ in that they travel with more companions than those from other countries. They travel to a greater extent with children. 1 in 3 Swedes and 2 in 5 Danes travel with their children on holiday in Norway. Even though

more people travel together from Sweden and Denmark, tourists from neighbouring countries are among those who spend the least per person and for the travel group overall.

Average number of travelling companions per holiday market



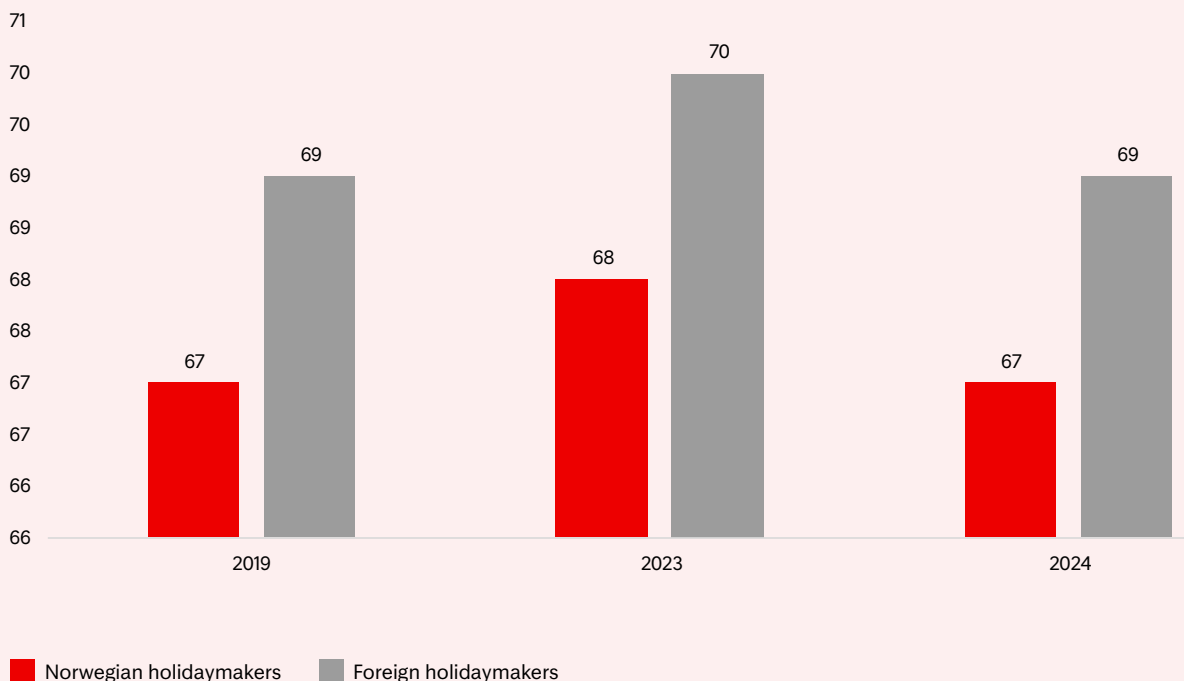
Source: The Tourism Survey, Innovation Norway

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

The average satisfaction among holidaymakers in Norway is generally high. Satisfaction was roughly equal for both foreigners and Norwegian tourists, and the share that would recommend Norway as a destination to others is also equivalent. A measure used to assess loyalty is the Net Promoter Score (NPS). Both Norwegian and foreign tourists are highly likely to recommend Norway as a holiday destination after holidaying here, though it is slightly higher among foreign visitors. The NPS increased slightly in 2023, but 2024 was back to 2019 levels.

The vast majority of foreign tourists would recommend Norway as a travel destination to friends and acquaintances. They are still least satisfied with the price to quality relationship, but satisfaction has increased in line with the weakening krone.

In order for more people to be able recommend Norway as a travel destination, it is most effective to make it easier to experience local culture and lifestyle, make attractive local products more available and ensure that it is easy to find destinations, means of transport and experiences that do something for nature and the environment.



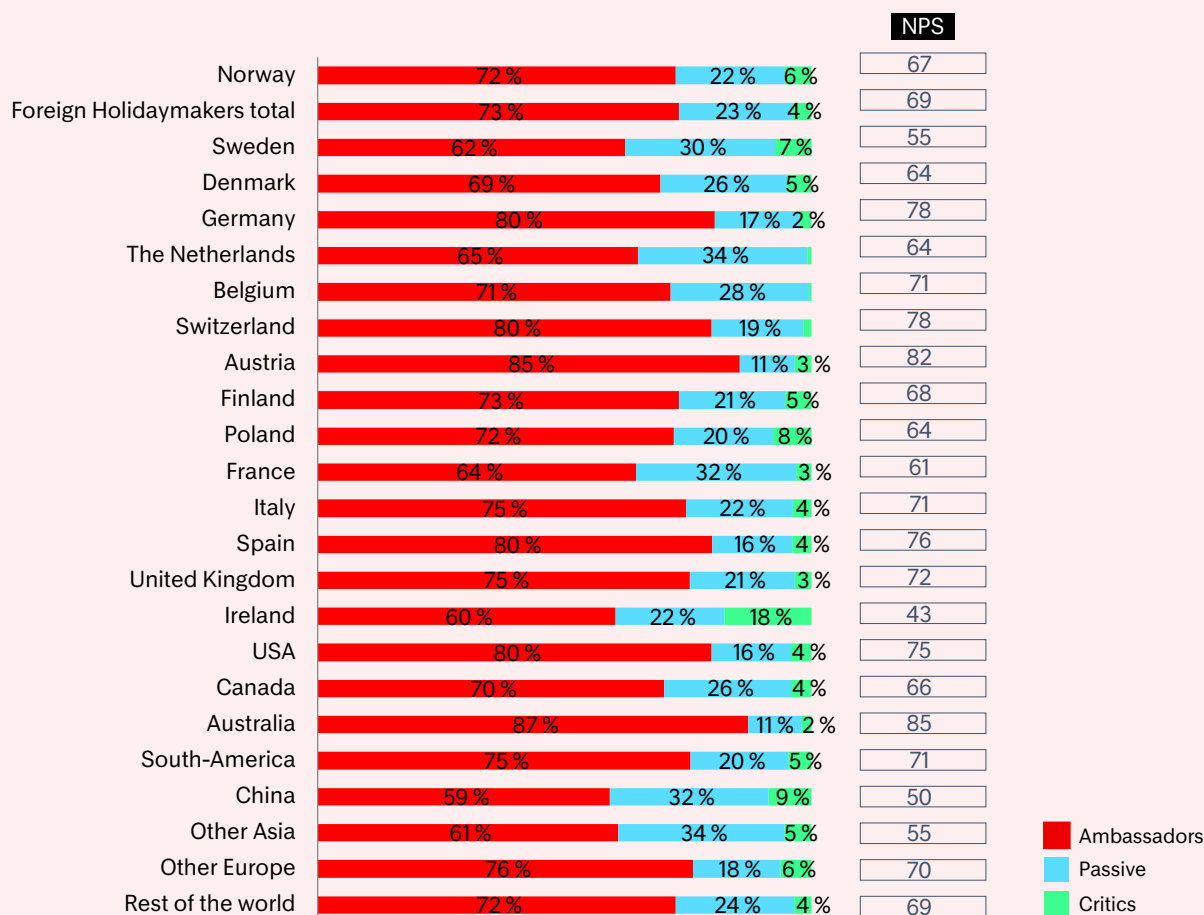
Source: The Tourism Survey, Innovation Norway

3 out of 4 would recommend Norway to friends and acquaintances

More than half of the tourists, both from Norway (58%) and abroad (55%), 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, Poles, Chinese and Irish. Most of those who lower the NPS are passive – neither critical nor enthusiastic.

Tourists from Germany, Austria, Switzerland, the United States, Spain and Australia are most likely to recommend a holiday in Norway.

NPS (Net Promoter Score)



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 = % ambassadors – % critics.

Source: The Tourism Survey, Innovation Norway

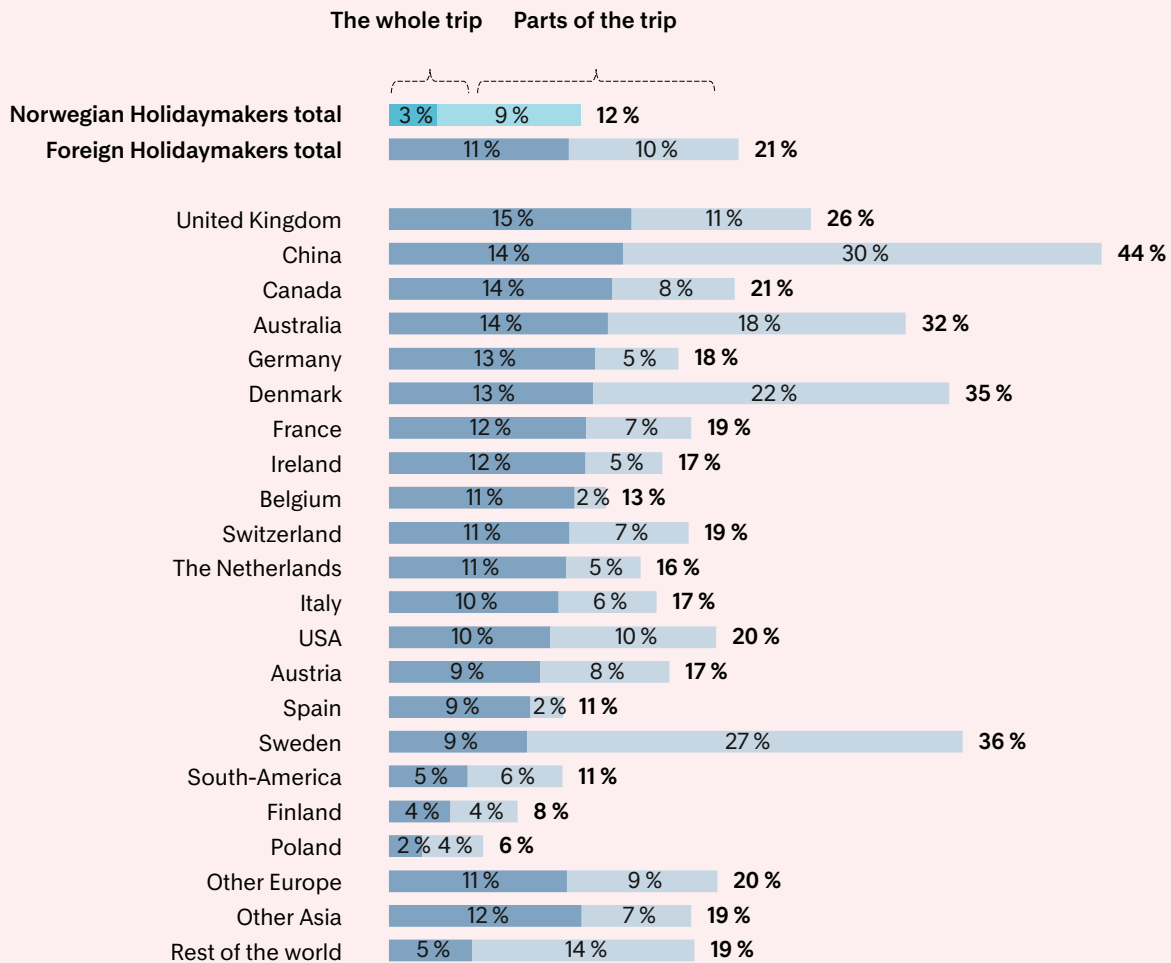
1 in 5 have purchased all or part of the trip as a package holiday

It is far more likely that someone will buy a package holiday in winter and autumn than during the summer season. Swedes and Danes buy more parts of their trip as a package holiday, especially ski holidays in the winter.

It is worth highlighting that a package holiday in this context is 'a package which includes at least two of the following services: transport, overnight accommodation, two or more meals per day and/or activities/excursions.'

Travellers from other markets state to a greater degree that they have purchased their entire trip as a package holiday.

Share of holidaymakers who have purchased all or part of the trip as a package holiday



Source: The Tourism Survey, Innovation Norway

07

Environmental considerations and the label for sustainable destinations

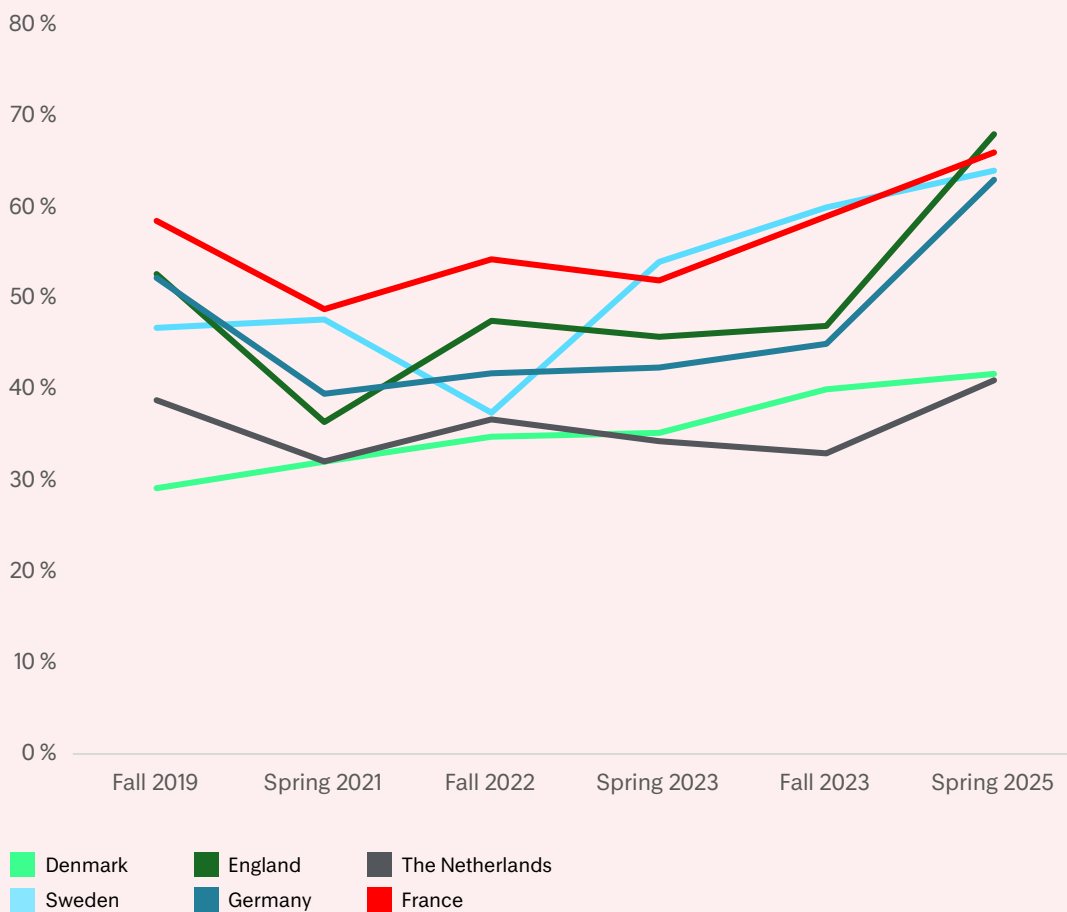


Far more consider a holiday to Norway as a good choice for nature, climate and the environment.

The image of Norway as a choice for protecting the climate and environment has seen a positive development since 2019. This goes in particular for the United Kingdom, where 68 per cent of the travelling population consider Norway as a good choice. France follows next with 66 per cent, then

Sweden with 64 per cent, Germany with 63 per cent, Denmark with 42 per cent and the Netherlands with 41 per cent. In all surveys, Denmark and the Netherlands have the lowest opinion of Norway, but the share is also higher in the latest survey than some previous ones.

To what extent do you agree or disagree with the following statement?
 Travelling to Norway will be a sustainable choice for me. Proportion who responded strongly agree or slightly agree.



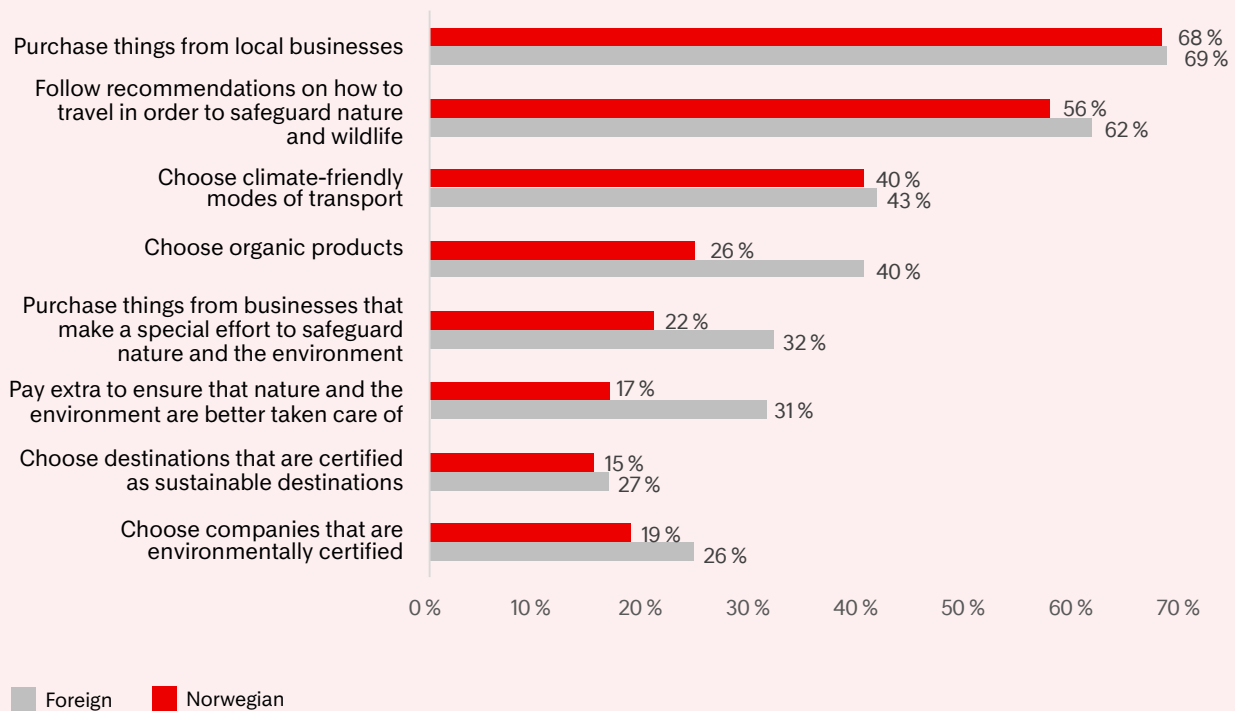
Source: Travel Barometer, Innovation Norway

Environmental consciousness among foreign tourists in Norway

Foreign tourists show a significantly higher degree of environmental consciousness during their stay in Norway compared to Norwegian tourists. The Travel Barometer from Innovation Norway shows that 69 per cent of foreign visitors shopped from local enterprises, while 62 per cent followed advice and recommendations on how they should travel to safeguard nature and wildlife. Furthermore, 43 per cent answered that they chose environmentally-friendly means of transport, and 40

per cent had chosen organic products. Additionally, 27 per cent answered that they had chosen to visit destinations that are certified as sustainable destinations. Generally, responses from foreign visitors gathered in spring 2025 are one per cent below the 2023 survey.

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



Source: The Tourism Survey, Innovation Norway

Label for Sustainable Destinations – Eleven years of long-term innovation

Sustainable Destinations is a tool offered by Innovation Norway to destinations that want to work in a long-term and focussed manner for sustainable tourism. Qualifying for the label does not mean that the destination is sustainable, however the label obliges the destination to long-term and structured work for more sustainable tourism. In 2013, Innovation Norway launched the first national programme for a label for destinations working in a long-term manner for a more value-creating, inclusive and responsible tourism. At year-end 2024, 41 destinations were labelled as Sustainable Destinations, and a further 14 were in the process of receiving the label.

Since the beginning, its aim has been to provide tourism with a tool for a more sustainable development in tourism. Tourism provides opportunities for value creation, employment and local development, but also provides challenges that need to be resolved in partnership with industry, municipalities and local communities.

The label scheme is a voluntary scheme that aims to contribute to increased sustainability through better governance of local tourism. The target group for the tool is a site, city or rural area wanting to make increased sustainability in tourism more concrete than some lofty ambition. Concrete measures and solutions are implemented in partnership between tourism, municipalities and important stakeholders in the local community. The stakeholders agree on shared plans and priorities, and the destination measures progress over time on a number of indicators that cover the entire breadth of the term sustainability. Different guides and tools are offered to the destinations in the process. At the core of the work is a standard that highlights measures that the destination can and must implement. For example, this could be cooperating on the proper arrangement of hiking trails and attractions in

vulnerable natural areas, or it could involve working for good accessibility for everyone visiting the destination, regardless of physical ability. The aim is to strengthen both management capability and value creation through more sustainable solutions and priorities, and that jointly the destination should be more attractive for residents and guests wanting to experience the local culture, and nature, enjoy local food and use local accommodation.

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

10 principles of sustainable tourism

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

08

Cruise tourism

– Norway as a cruise destination and development in a global perspective



Number of cruise passengers in the world

The number of cruise passengers in the world has increased from 31.7 million in 2023 to 34.6 million in 2024 according to figures from the Cruise Lines International Association (CLIA). This is a growth of nine per cent. Destinations such as the Caribbean, the Bahamas and Bermuda are the most popular, followed by the Mediterranean and other European destinations.

Biggest growth in North America

If we examine cruise traffic globally, the greatest growth was once again in 2024 in North America, which with its 20.53 million cruise tourists accounts for over half of all cruise passengers, with a 57 per cent share. In 2023, this share was 53 per cent. This is followed by Europe, which with 8.44 million passengers has a 24 per cent share, down from 26 per cent in 2023. Asia and the Pacific countries have increased from 2023, but are still below pre-pandemic levels as of 2024. South America had 1.17 million cruise passengers, which represents good growth on 2023 and 2019.

Strong growth in the number of cruise passengers in Norway from 2019 to 2024

In 2024, there were 1.5 million unique cruise passengers in Norway. This is unchanged from 2023, but from 2019 the number of cruise passengers has gone from 945,000 to 1.55 million which is an increase of 62 per cent. This means that Norway’s share of international cruise tourism is at 4.3 per cent.

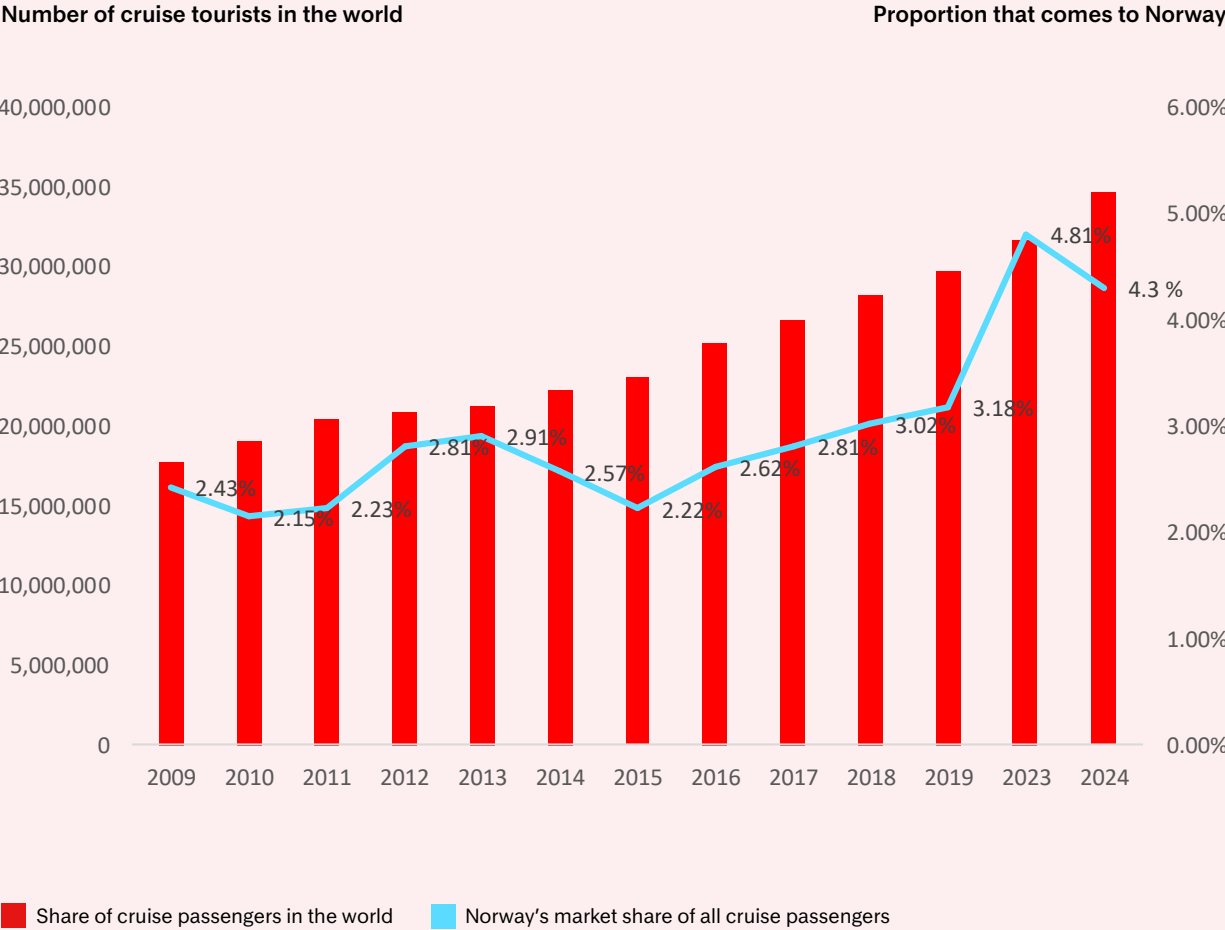


While Norway’s share of international land-based tourism was at 0.5 per cent, our share of international cruise traffic is at 4.3 per cent.

Global share	2019	2023	2024	% change 2023-2024	% change 2019-2024
World	29.7 million	31.7 million	34.6 million	9.30%	16.00%
North America	15.4 million	18.1 million	20.53 million	13.40%	33%
Europe	7.7 million	8.2 million	8.44 million	2.80%	10%
Asia-Pacific	5.09 million	3.67 million	4.03 million	9.80%	-21%
South America	1.04 million	997,000	1.17 million	7.80%	12.50%
Norway	945,000	1.5 million	1.5 million	0%	62%

Source: Cruise Lines International Association (CLIA) and the Norwegian Coastal Administration

Developments in international cruise traffic and Norway’s share



Source: Cruise Lines International Association (CLIA) and the Norwegian Coastal Administration

The development of cruise tourism in Norway

In 2024, there were 1,535,235 unique cruise passengers in Norway. On average, each passenger visited four Norwegian ports, and the total number of recorded arrivals at Norwegian ports amounted to 5,882,432. This can be compared to how land-based tourism is measured, where the number of overnight stays is used to say something about volume. It is worth noting that some voyages can dock at two different ports in a single day, which means that the same passenger may be counted multiple times. However, such cases are exceptions and constitute a smaller share.

Slight decrease from 2023 to 2024

In 2024, 3,654 cruise calls were recorded at Norwegian ports, a reduction of 158 calls compared to the record year of 2023. The decrease came in

the high season of June, July and August, and to a lesser extent in September and November. The decrease in the number of calls caused the number of cruise passengers to fall from 5,942,434 in 2023 to 5,882,432 in 2024. This change corresponds to a one per cent decrease, or approximately 60,000 fewer passengers.

Significant growth from 2010 to 2024

Cruise traffic to Norwegian ports has experienced a marked increase over the past 14 years. The number of cruise calls has more than doubled, from 1,654 in 2010 to 3,654 in 2024, corresponding to a growth of 121 per cent. In addition to an increase in the number of calls, the evidence suggests that cruise ships have got bigger as the average number of cruise passengers on board has gone from 1,141 to 1,610.

Good development from 2010-2024

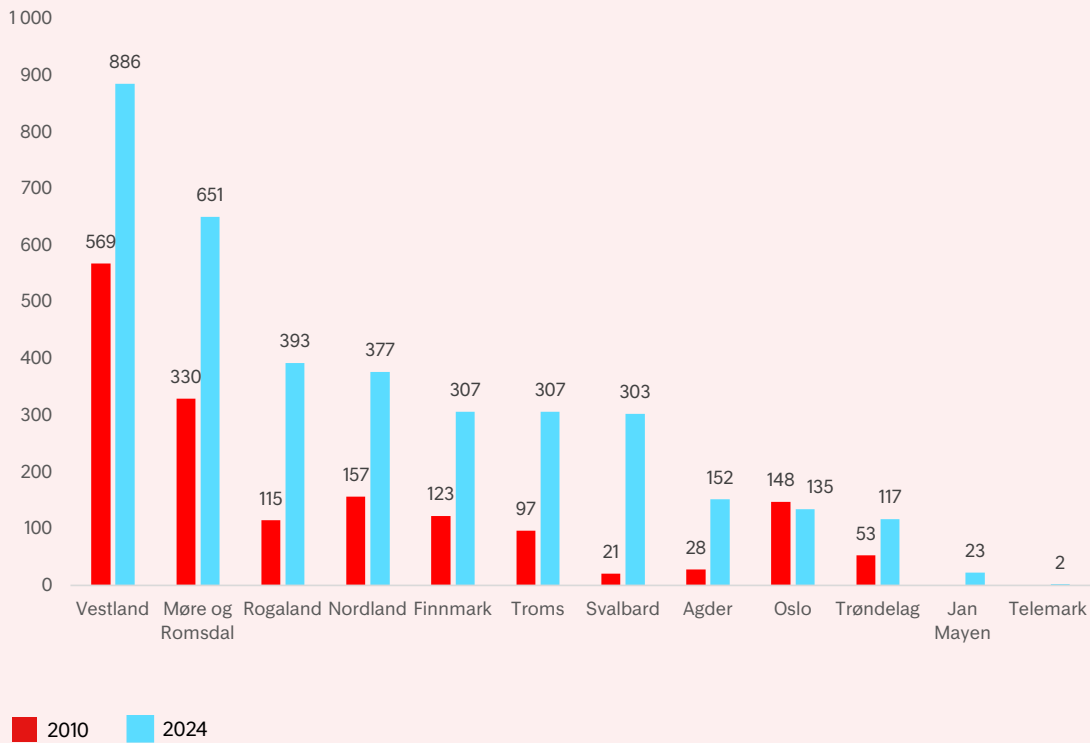
	Number of calls	Number of passengers	Average number of passengers on board
2010	1,654	1,887,709	1,141
2011	1,682	2,157,880	1,283
2012	2,171	2,887,533	1,330
2013	2,262	3,058,750	1,352
2014	2,171	2,814,829	1,297
2015	1,839	2,543,520	1,383
2016	1,960	2,559,684	1,306
2017	2,130	2,965,839	1,392
2018	2,459	3,463,715	1,409
2019	2,634	3,739,508	1,420
2020	434	118,609	273
2021	361	141,438	292
2022	3,413	4,087,277	1,198
2023	3,812	5,942,434	1,559
2024	3,654	5,882,432	1,610

Western Norway and Northern Norway continue to attract cruise tourists

Cruise tourists have a shared interest with land-based travellers: They come to Norway to experience the spectacular nature of Western Norway and Northern Norway. If we look at which ports received the most cruise calls in 2024, Western Norway is the undisputed favourite, followed by Northern Norway. Counties in Western Norway top the list with 886 calls, an increase of 317 since 2010. Møre and Romsdal alongside Rogaland follow after, and

together this part of the country saw 1,930 cruise calls in 2024. In Northern Norway, Finnmark, Troms and Svalbard had a total of 1,294 cruise calls in 2024, and the region has seen, alongside Western Norway, the greatest growth since 2010. Oslo is the only county that saw a decrease in cruise arrivals in 2024 compared to 2010.

Cruise calls by county 2010-2024



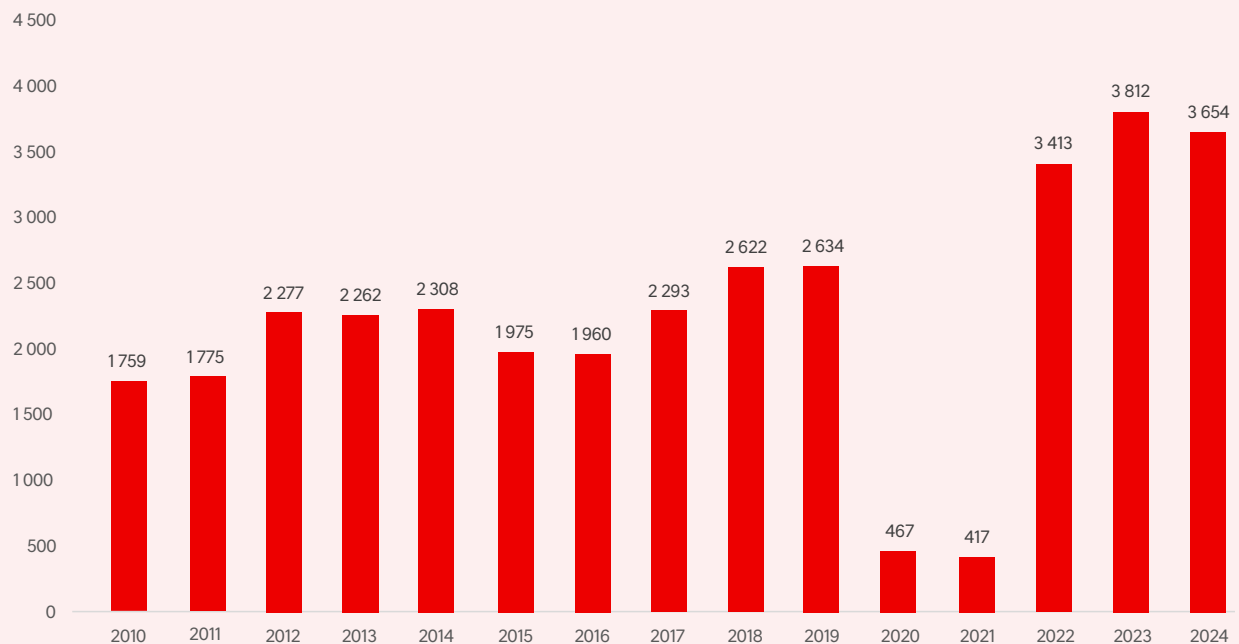
Source: Norwegian Coastal Administration

Number of port calls and distribution throughout the year

3,654 cruise ships anchored in one or more Norwegian ports over the course of 2024.

With the exception of the pandemic years of 2020 and 2021, there has been a steady increase in both port calls and cruise passengers since 2016. Cruise traffic in 2023 has doubled compared to 2016. In 2024, the trend and number of calls flattened out with 3,654 cruise calls, which is 158 fewer than in the record year of 2023.

Port calls in Norway from 2010 to 2024

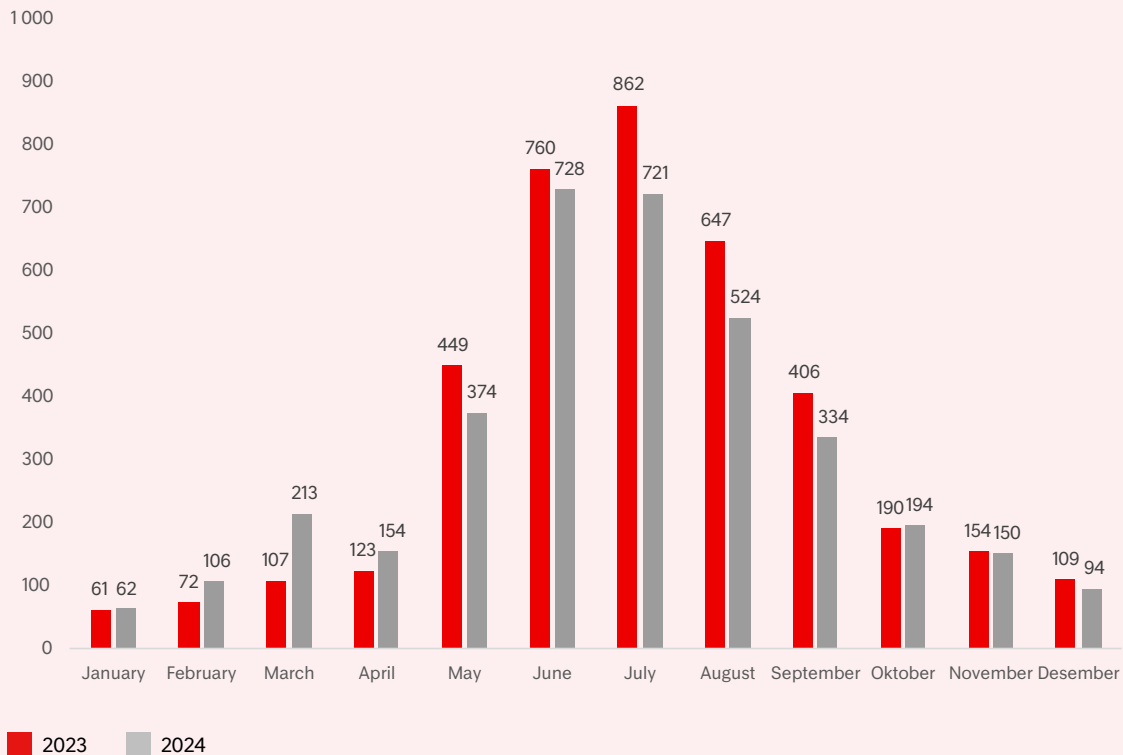


Source: Kystdatahuset service, Norwegian Coastal Administration

Significant growth outside of the high volume season

In 2024, there were a total of 3,654 cruise calls in Norway, which is 286 fewer calls compared to the previous year, and the figures show a positive development in several areas. During the high volume season, which includes June, July and August – with over half of the year’s total arrivals (54 per cent) – there was a decrease of 296 calls. At the same time, the months with fewer arrivals, such as February, March and April, show a total increase of 171 cruise calls. This indicates a wider spread of cruise traffic outside of the traditional peak months.

Cruise calls per month 2023-2024



Source: Kystdatahuset service, Norwegian Coastal Administration

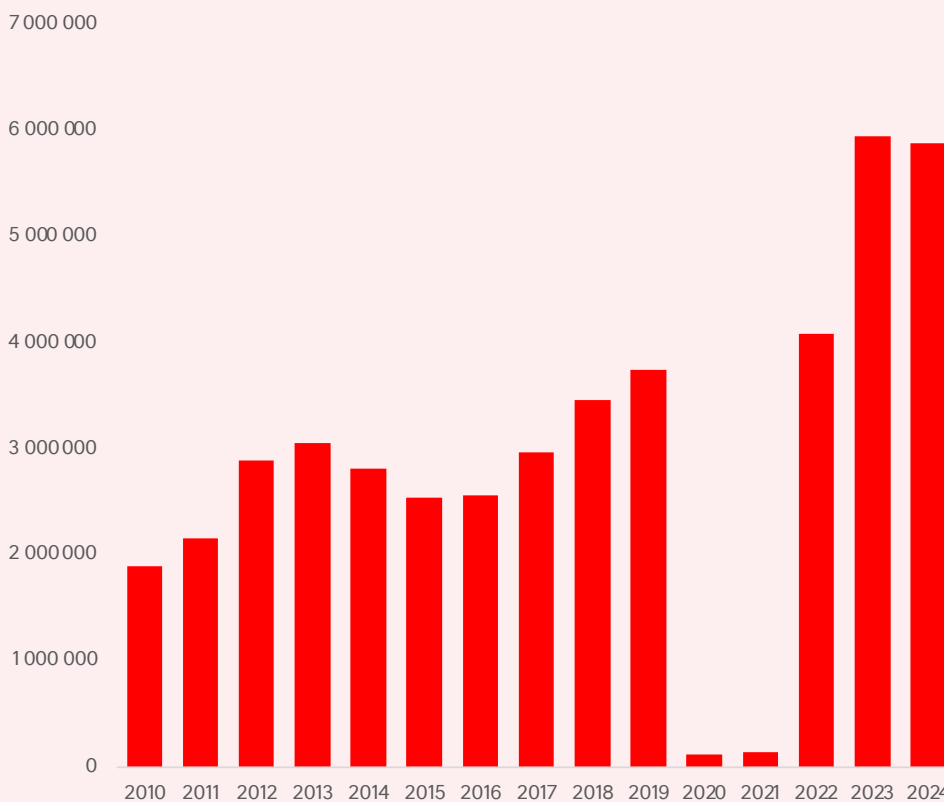
Number of cruise passengers and distribution throughout the year

Stabilisation of cruise traffic and improved seasonal distribution in 2024

After the record year of 2023, Norway recorded a total of 5,882,432 cruise passengers at Norwegian ports in 2024, a decline of 1,764 compared to the previous year. This reduction reflects the decrease in the number of cruise arrivals in June, July and August. In addition, there was a slight decrease in September and November. Beyond this, however,

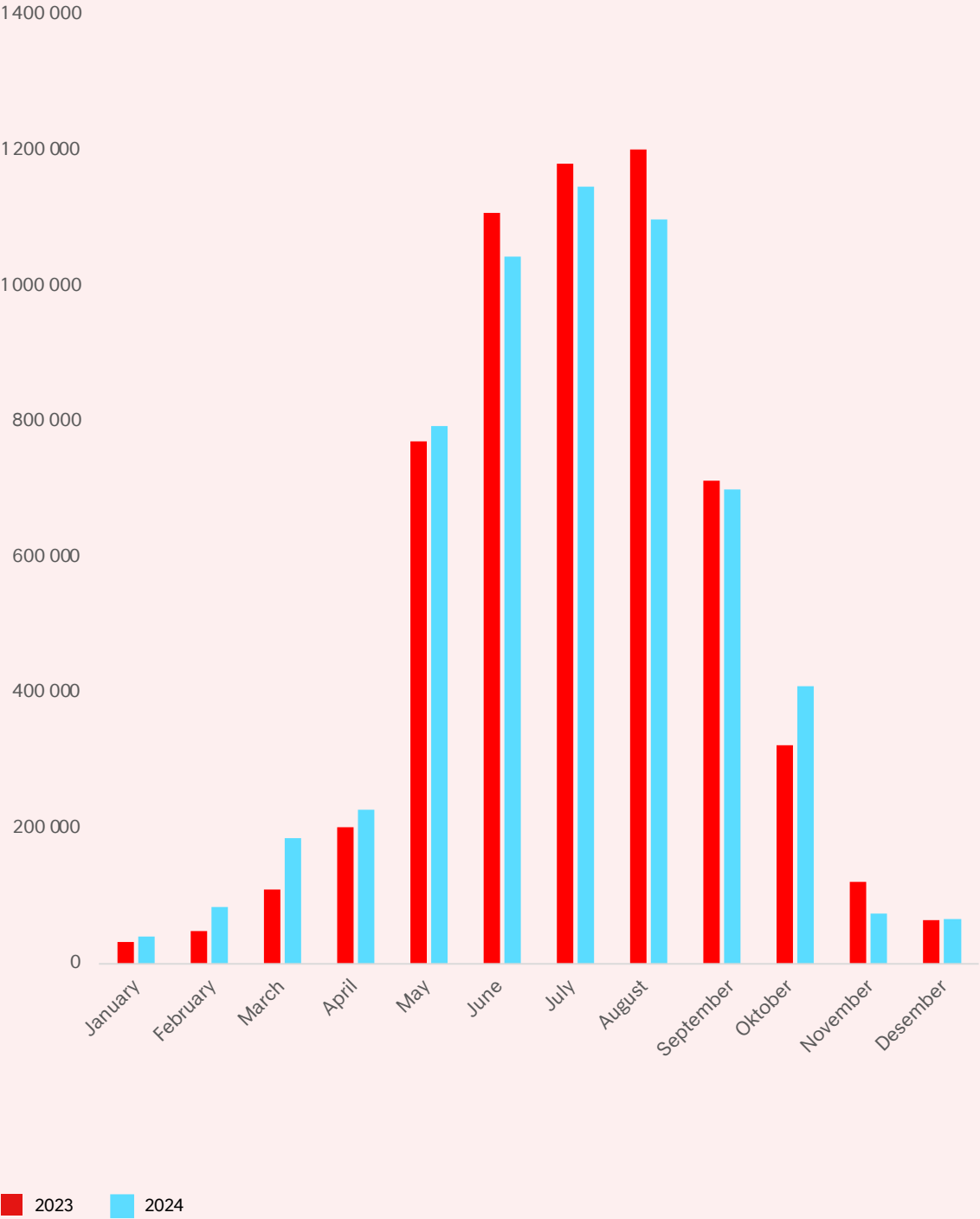
there was a marked increase in the number of passengers in the remaining months of the year. The fact that the cruise industry is able to spread traffic is reflected in the Gini coefficient, which is a measure of traffic distribution. The coefficient went from 0.50 in 2023 to 0.47 in 2024. Despite improved seasonal distribution, the summer months of June, July and August remain the busiest, with 56 per cent of all cruise passengers arriving during these months.

Cruise passengers 2010-2024



Source: Kystdatahuset service, Norwegian Coastal Administration

Cruise passengers per month 2023-2024



Source: Kystdatahuset service, Norwegian Coastal Administration

The three largest nationalities of German, British and American make up an impressive 77 per cent of all cruise passengers that visited Norway

Germany is also the largest market measured by cruise tourists. While most German overnight stays were at hotels, campsites and cabin villages, German cruise passengers totalled 1.5 million in 2024. This corresponds to a 45 per cent market share of all cruise passengers this year. This is a decrease of two per cent from 2023, but the number of German cruise passengers is double that of 2019.

After Germany, the United Kingdom has half as many cruise passengers, representing a 21 per cent share. The third largest market is the United States, followed by Italy, Spain, the Netherlands, Canada, France, Australia and Belgium, which is last on the overview with 14,300 cruise passengers. Overall, other nationalities totalled 131,000, but this is spread across many nationalities.

Nationalities with the most cruise passengers to Norway. Figures show unique cruise passengers

Country	2019	2023	2024	% change 2023-2024	% change 2019-2024
Germany	351,980	704,891	688,405	-2%	96%
UK	209,060	325,594	325,952	0%	56%
USA	117,388	141,601	169,866	20%	45%
Italy	37,833	56,883	56,875	0%	50%
Spain	37,610	46,760	53,871	15%	43%
The Netherlands	20,696	48,636	33,469	-31%	62%
Canada	20,703	20,190	23,603	17%	14%
France	18,322	21,804	22,078	1%	20%
Australia	17,224	12,790	15,804	24%	-8%
Belgium	11,464	21,804	14,301	4%	25%
Other nationalities	102,664	130,408	131,011	0%	28%
Total	944,944	1,523,263	1,534,263	1%	62%

Source: Norwegian Coastal Administration

09

Norwegians' holiday habits

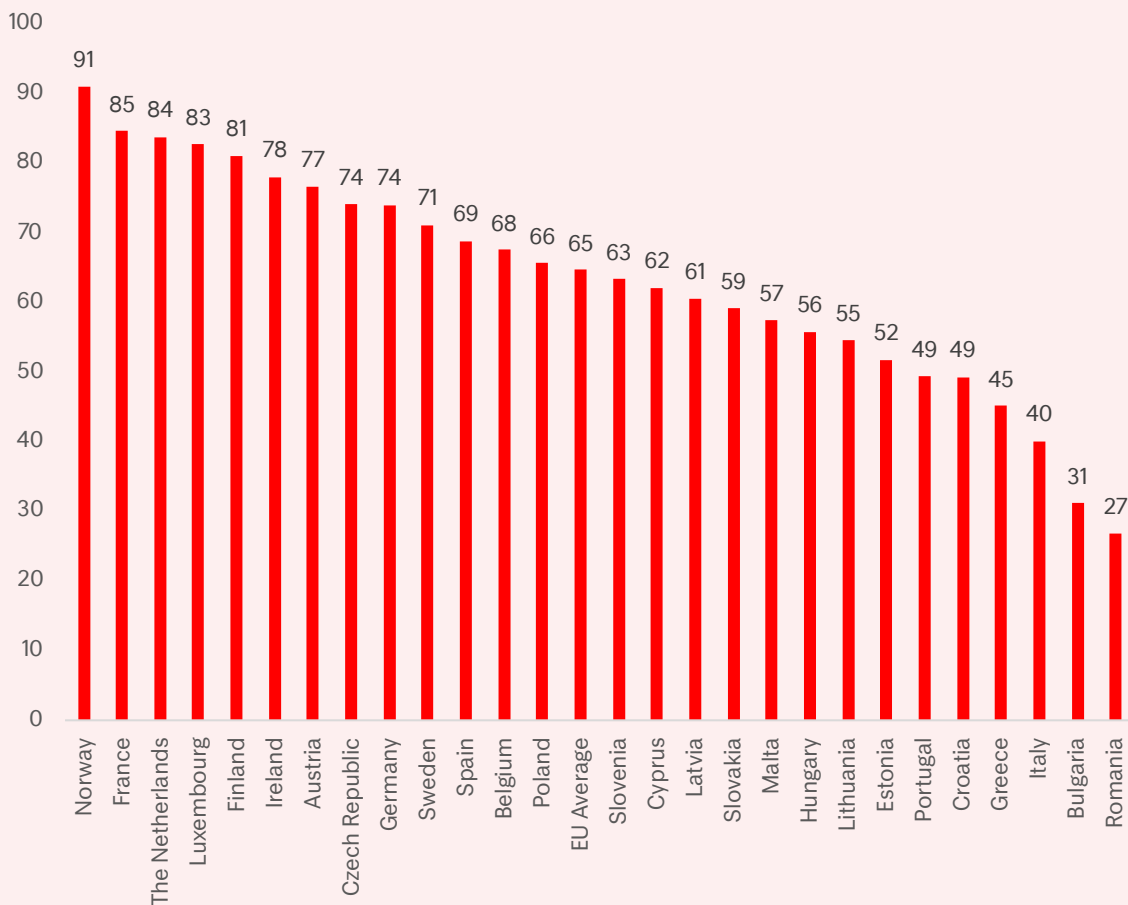


Norwegians travel the most in Europe

Figures for 2023 from Eurostat show that Norway was once again at the top of the list with the largest proportion of the population that has travelled for leisure or business purposes. A whole 91 per cent of us. We already topped the list in 2012, then we were bested by Finland, before we returned to the top in 2018, 2019, 2022 and 2023. France

and the Netherlands are now next on the list, and Finland is down to fifth place with 81 per cent of the population. At the other end of the scale is Bulgaria with only 28 per cent of the population having been on holiday. This is followed by Romania, then Italy, Greece, Portugal, Estonia, Croatia and Lithuania.

The proportion of the population that travelled for leisure or business in 2023. Includes both domestic and international travel



Source: Eurostat. Figures from 2024 were not public as of time of publication.

The vast majority of holiday trips were here at home

Norway still the top destination for Norwegians

Norwegians have always taken most of their holidays in a year in their own country. Here, trips to hotels, as well as holidays to family, friends, a personal or rented cabin or trips in a campervan are included.

In 2024, Norwegians took a total of 27 million holiday trips, both at home and abroad. This is a growth of nine per cent from 2023, meaning almost 2.3 million more holiday trips. The growth represents eight per cent more domestic holiday trips, and with 1.55 million more domestic holiday trips we ended the year with 19.8 million domestic holiday trips. There were 7.3 million foreign trips, representing a growth of 11 per cent, or 720,000 more trips.

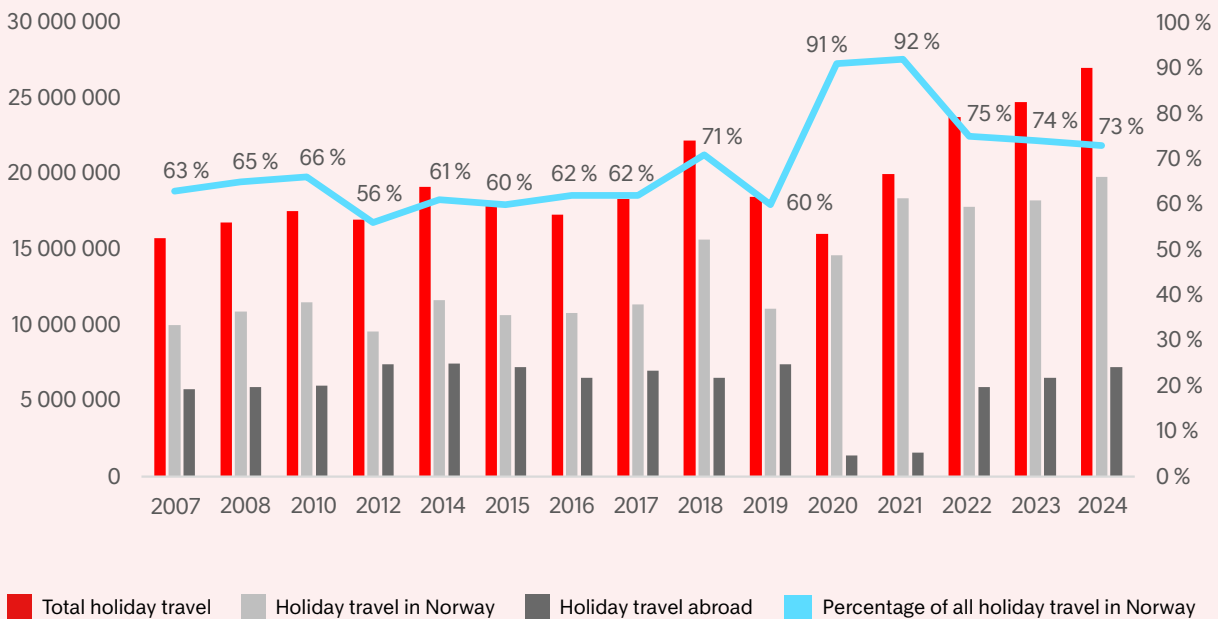
Only growth in number of Norwegian holidays from 2019

If we look at the development from 2019, Norwegians had two per cent fewer foreign trips in 2024. All growth in the number of holiday trips have gone to domestic travel. We had 79 per cent more domestic holiday trips in 2024 compared to 2019. Much of this may be related to the weak exchange rate and that it is significantly more expensive for Norwegian's to travel abroad. Read more about the development in the exchange rate on page 25. At the same time, there were far fewer who purchased cabins and holiday homes during the pandemic, which would normally be used during the holidays.

Many more domestic holiday trips compared to the high of 2021

Holiday and leisure travel

Share of all domestic holiday and domestic travel



Source: Tourism Survey, Statistics Norway

Norwegians continue to use most of their holidays domestically

2023 was the first time in a normal year that Norwegians used the vast majority of their holiday budget on domestic holidays, and that continued into 2024, with Norwegians using 52 per cent of total holiday consumption on domestic holidays. Before the pandemic, this share was at 26 per cent.

In total, Norwegians spend NOK 173.7 billion on holiday and leisure travel in 2024. This is a growth of five per cent from the year before, representing a growth of almost eight billion. Of this eight billion in growth, 5.3 billion went to domestic holidays, while 2.7 billion went to international travel.

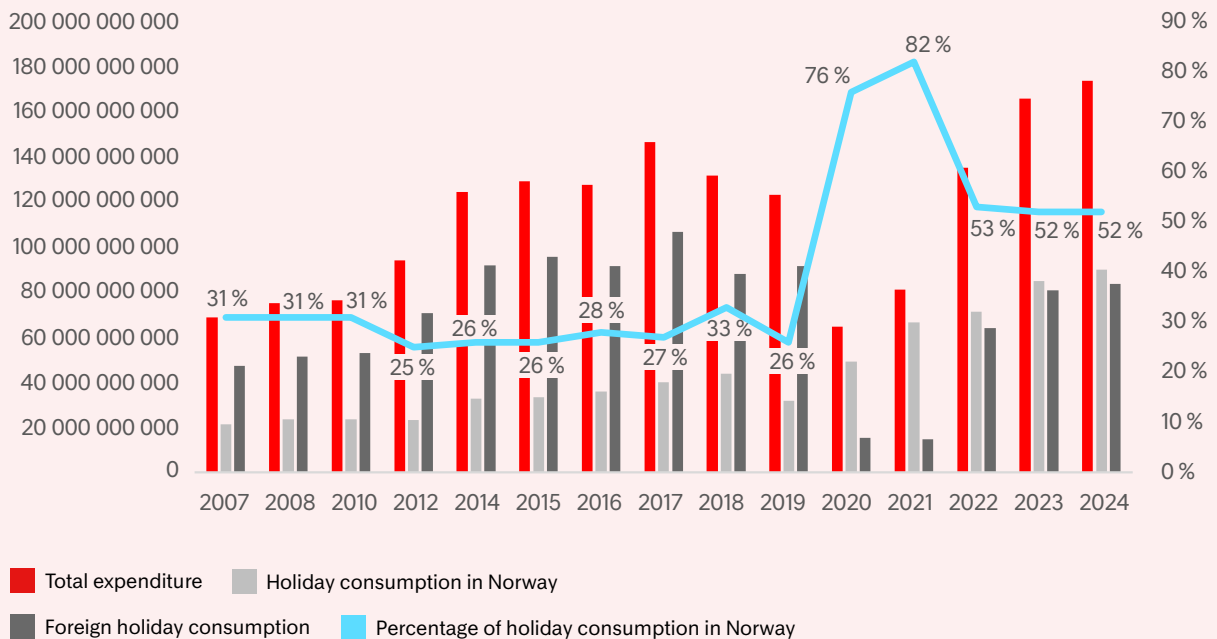
This means that we spent NOK 90.1 billion on Norwegian holidays and NOK 83.6 on international holidays. This is an increase of six and three per cent. As the page opposite shows, 73 per cent of all

holidays were domestic. Even though we are using an increasing amount of holiday consumption here at home, there is still a gap between the 73 per cent of all holidays and 52 per cent of total expenditure.

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

Holiday and leisure consumption

Share of holiday and leisure consumption in Norway



Source: Tourism Survey, Statistics Norway

10

Event tourism



Cultural and sporting events play a crucial role for Norwegian tourism

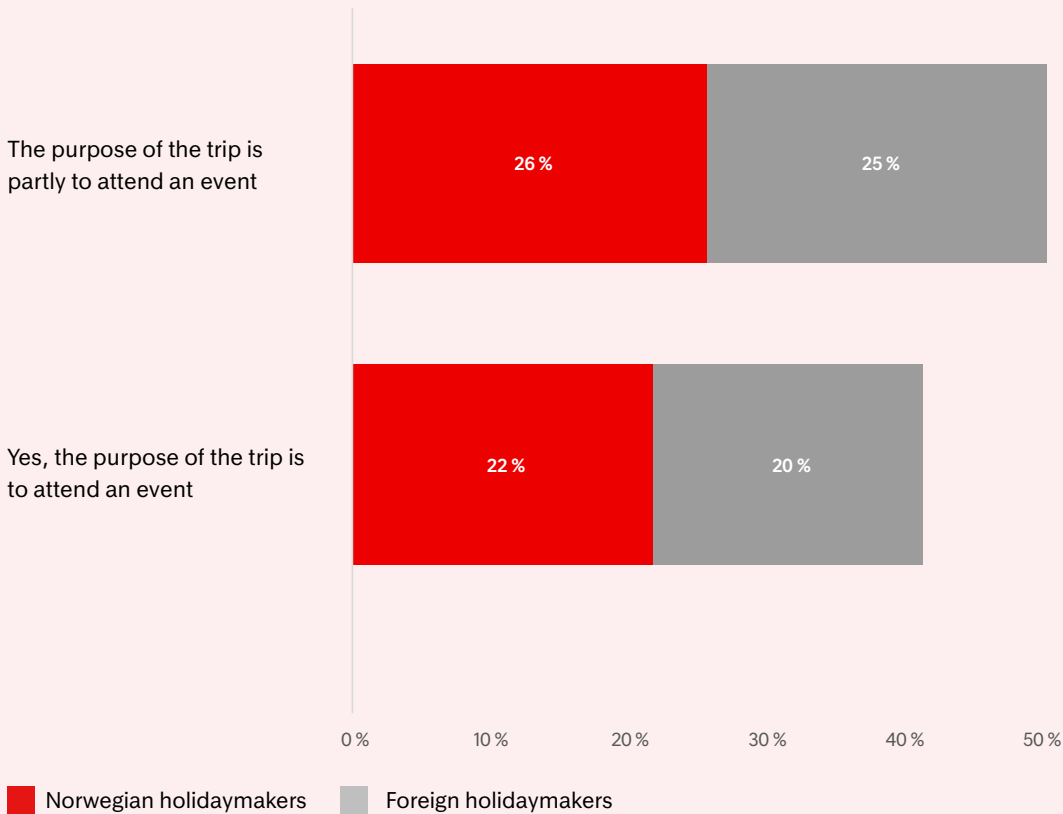
Throughout the whole year, a broad range of events are held across the country, from small local events to major international festivals, concerts, religious ceremonies, marathons, as well as European and world championships in various sports.

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

And this work is bearing fruit

The Tourism Survey by Innovation Norway shows that events are an important motivating factor for tourists visiting Norway. 48 per cent of all Norwegian holidaymakers and 44 per cent of foreign visitors visiting the country in 2024 stated that attending an event was the purpose of coming here either in whole or in part.

Is attending an event the main purpose of this trip?



Source: The 2024 Tourism Survey, Innovation Norway

Events with international participation in 2024

Sponsor Insight developed a survey of international sporting and cultural events in Norway on behalf of Innovation Norway.

The survey identified 1,651 events with international participants in Norway in 2024. These were spread across all counties in Norway and took place in all months of the year, with most being in August.

Music festivals	Other festivals	Cultural events and concerts	Sports
311 events	125 events	792 events	423 events
Estimated number of participants	Estimated number of participants	Estimated number of participants	Estimated number of participants
16,400 Norwegian (64% share)	11,000 Norwegian (87% share)	35,500 Norwegian (82% share)	583,800 Norwegian (89% share)
9,100 foreign (36% share)	1,600 foreign (13% share)	8,000 foreign (18% share)	71,900 foreign (11% share)
Estimated number of spectators	Estimated number of spectators	Estimated number of spectators	Estimated number of spectators
2,400,000 Norwegian (96% share)	772,300 Norwegian (99% share)	2,874,900 Norwegian (98% share)	1,302,600 Norwegian (94% share)
86,000 foreign (4% share)	10,500 foreign (1% share)	67,700 foreign (2% share)	84,300 foreign (6% share)

Source: Sponsor Insight

Events create turnover for the tourism industry throughout the year

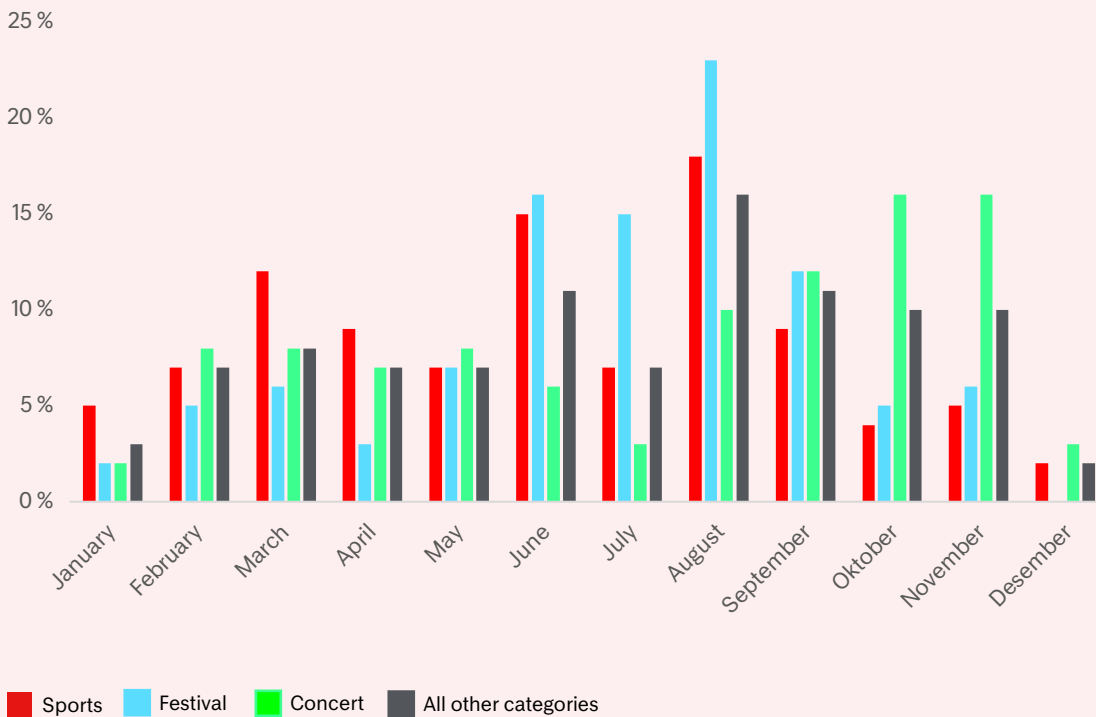
More events with international participation are held later in the year than earlier. Overall, August is the peak with 16 per cent of the surveyed events. 273 unique events made up this 16 per cent. This means that there were about nine events per day in August.

The majority of festivals are held during the summer months, while concerts peak in the autumn months. When it comes to sports, we can see that such

events are held relatively evenly throughout the year, but with peaks in June and August.

July is the month in which most of the population is on holiday and is possibly away – as such, it is less attractive to organise an event during this month.

Distribution of events throughout the year



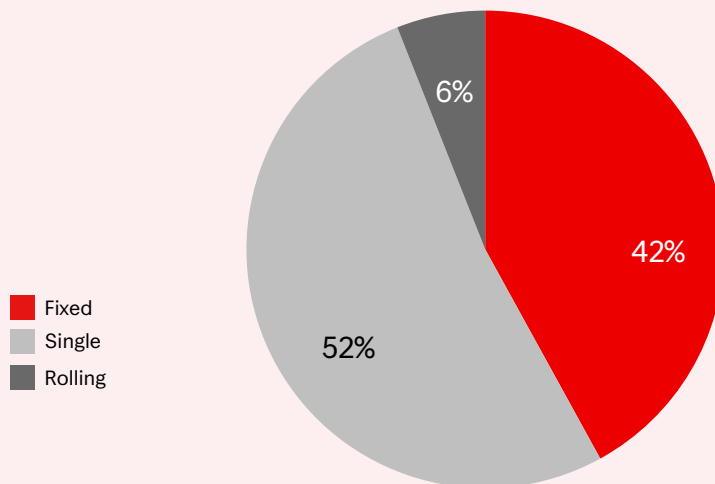
Frequency of events

According to the Sponsor Insights survey, 42 per cent of events are held at a fixed frequency. There are a number of positive effects to events being held at a fixed frequency, and often in the same place. Fixed frequency means annually or at a specific interval. It provides positive effects for organisers, communities, audiences and cultural life in general, such as stability and predictability, long-term collaborations and networks, development of the event’s program and content, economic growth for the local community and cultural and social identity.

Individual events typically include concerts, where the event is likely held only once, or there are only a fixed number of shows.

Six per cent of events are rolling

Rolling events are held at an uneven frequency in Norway and often in different places each time. These may include world or European championships: Norway last held the Ski World Cup in Oslo in 2011, the next time will be in 2025 in Trondheim. According to Future Market Insights, the international event tourism market is growing at an annual growth rate of 4.1 per cent and this growth is expected to increase to 4.3 per cent by 2034.



11

International meetings/ conferences



In 2024, 323 conferences were held in Norway.

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

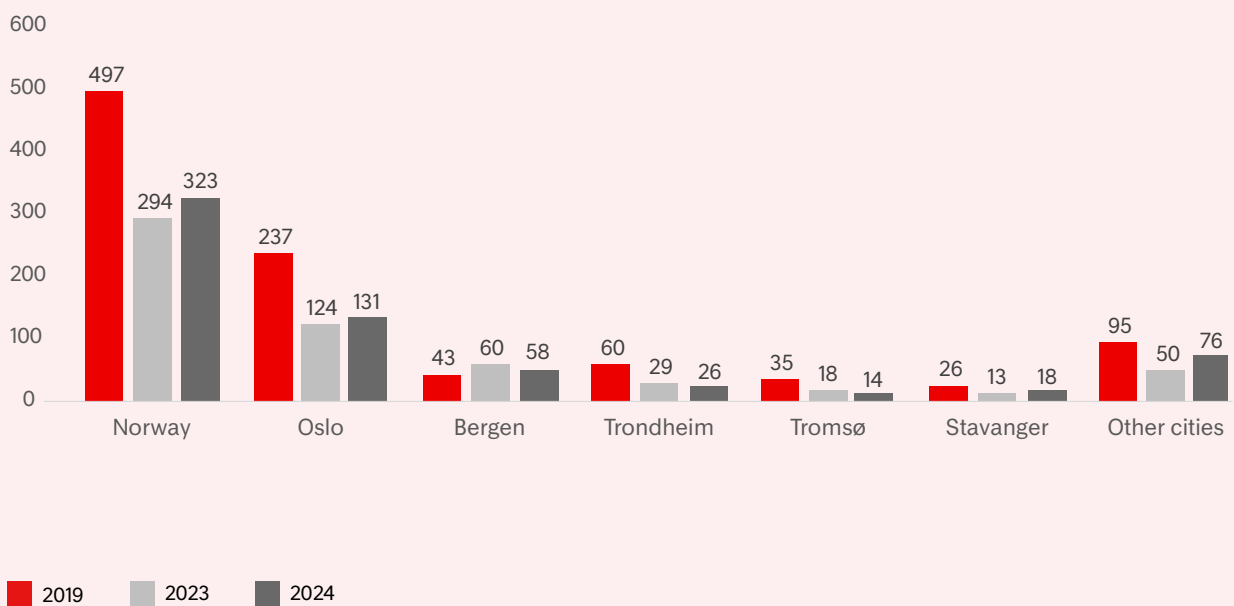
Most conferences were held in the five largest conference cities: Oslo, Bergen, Trondheim, Tromsø and Stavanger. These cities have the necessary infrastructure, such as direct flights, conference centres and sufficient hotel capacity, which smaller

locations often lack. This is also where the majority of universities, high schools and research institutes are located.

More conferences in 2024

In 2024, 323 conferences were held. This is a 35 per cent decrease from 2019 when there were 497 conferences. However, this is a positive development of 10 per cent from 2023 when there were 294 congresses. With the exception of Oslo, it is smaller cities in particular that have seen an increase in the past year.

Development in the number of conferences in Norway 2019-2024



Source: Economics Norway

Conferences as a focus area

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

These areas are:

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

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



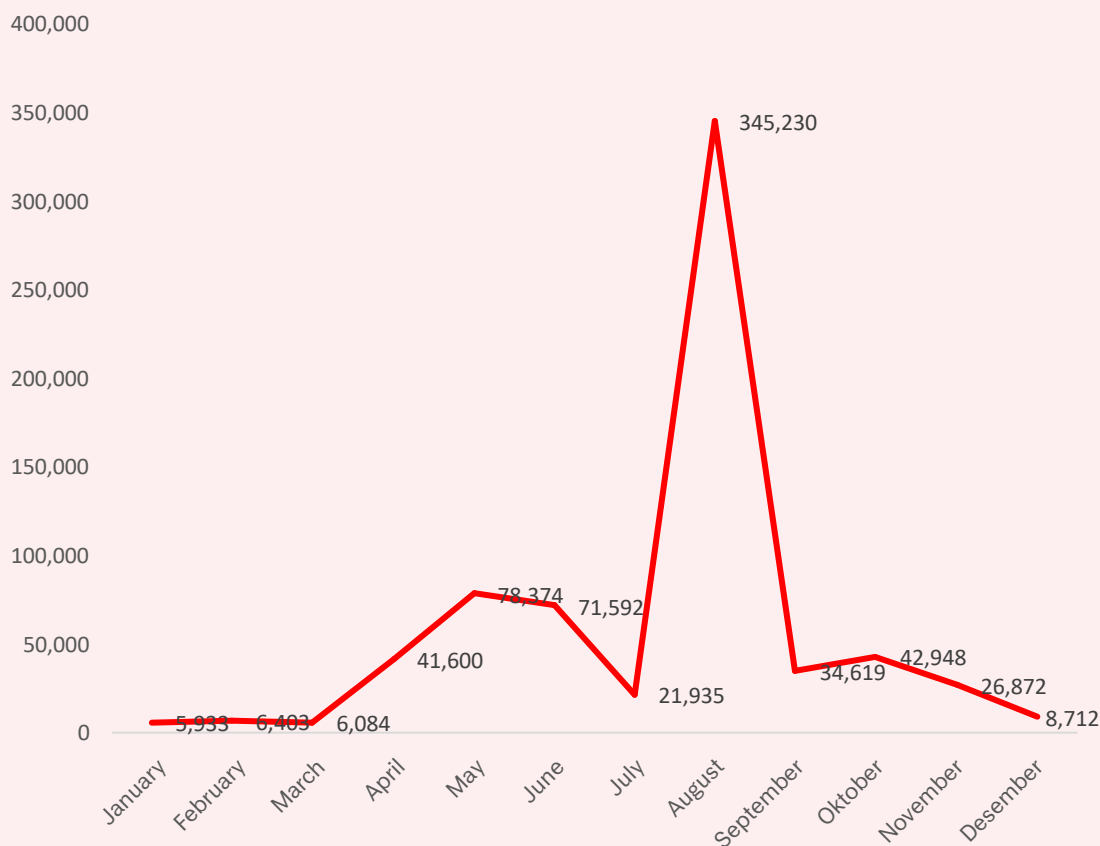
The distribution of conference-related overnight stays in hotels in 2024

Estimates of the number of overnight stays in hotels associated with conferences has been estimated to be 690,300. The high number of conference-related overnight stays in August is due to the ONS Conference which is held every other year.

not all conferences have figures or exact figures for the number of visitors. In addition, some of the participants may be local, or visitors who are staying with friends or family. This means that the actual figures may be lower or higher than illustrated here.

About the calculations: A note on the figures: The figures are based on available data from conferences held in 2024. However, it is important to note that

Overnight stays in hotels



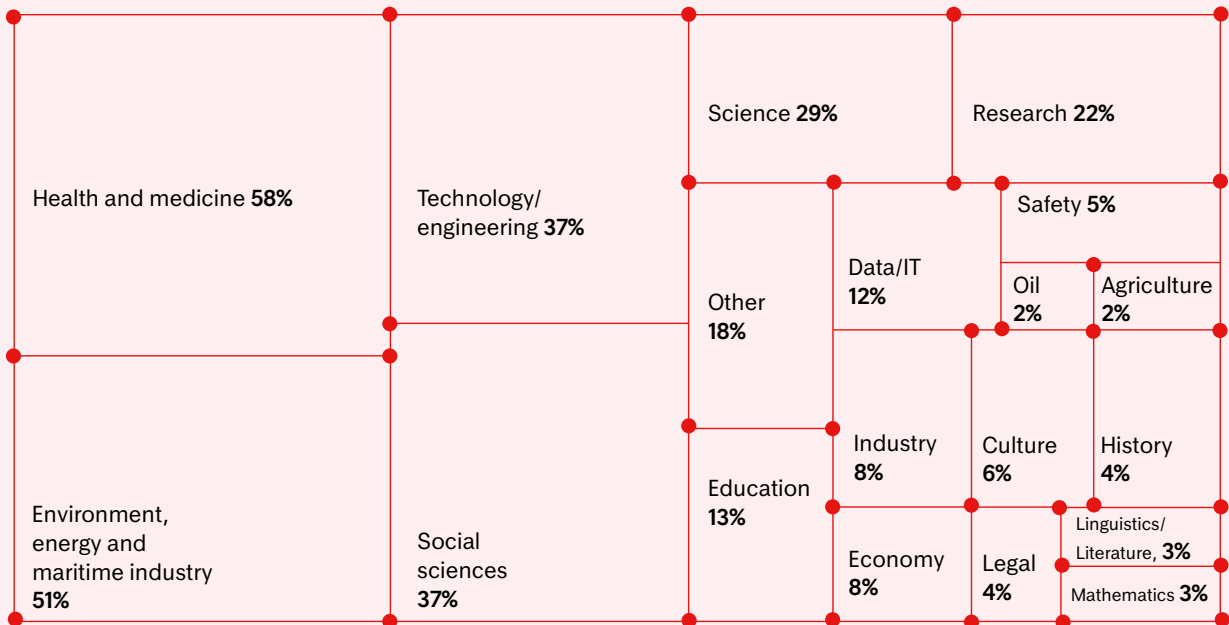
Source: Economics Norway

Professional areas for conferences in Norway

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

is a large focus on the development of new technology and the transfer of expertise.

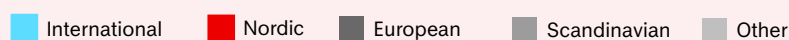
Internationally leading conferences contribute to the visibility and stimulation of Norwegian academic communities, to innovation and development, and to the position of Norway as a leading and competent nation.



Source: Economics Norway

Rotation pattern

Compared to 2023, 2024 saw a slight increase in international conferences, and slightly fewer purely European conferences.



Source: Economics Norway

Innovation Norway in brief

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

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

Innovation Norway has many clients, and they all require us to contribute to long-term, sustainable value creation in Norway and to work with companies both individually and within networks.

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

Innovation Norway's measures and services are designed to create more successful entrepreneurs, more companies with growth potential and more innovative business clusters. Our customer groups range from entrepreneurs, business ventures in the early start-up phase, and small businesses, to large groups of companies with growth potential in all sectors and industries. Common to all the groups is that they see opportunities in making use of the expertise and assistance that Innovation Norway provides on behalf of a society that attaches importance to new, forward-looking business development. With its nationwide network of offices, Innovation Norway is able to meet its customers in their business environment. Internationally, customers are served through our offices in the most important markets worldwide. Innovation Norway is owned by the Norwegian Ministry of Trade, Industry and Fisheries (51 per cent) and the regional authorities (49 per cent).



Definitions

Arrival A holiday or business trip with at least one overnight stay.

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

The Gini index: also known as the Gini coefficient, is a statistical measure of spread expressed as a value between 0 and 1. In this context, the index is used to analyse the distribution of overnight stays and cruise passengers throughout the 12 months of the year. If the travel destination has an even distribution of tourists each month, the Gini index will be 0, indicating a stable number of visitors throughout the entire year. In the opposite case, where a destination primarily receives visitors in the summer season, the index will be closer to 1. The lower the value of the Gini index, the better the seasonal distribution of visitors.

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

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

Brand Tracker Innovation Norway conducts weekly surveys in Denmark, Norway, Sweden, the UK, Germany, the Netherlands, and France. The survey includes questions about the likelihood of the respondent travelling to Norway and their perceptions of Norway as a tourist destination. The survey also indicates whether the marketing work being conducted is providing the desired results.

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

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

The Travel Survey A sample survey conducted by Statistics Norway, the purpose of which is to map Norwegians' travel habits domestically and abroad.

Tourism Satellite Accounts

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

Summer season The period covering May to August.

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

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

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

Foreigner A person who lives outside of Norway.

Winter season The period covering January to April.

Key Figures for Norwegian Travel and Tourism

2024



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