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# Exploring Domestic Tourism in the Nordics 2022 – Survey results

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# General information about the survey

This is a results report of a survey conducted as a part of the project **Exploring Domestic Tourism in the Nordics**. The project was financed by the Nordic Council of Ministers and coordinated by the Ministry of Economic Affairs and Employment of Finland.

The survey was directed at tourism companies and organisations in all the Nordic countries and autonomous areas. The main aim was to explore how the tourism sector enterprises and other organisations in different Nordic countries see the potential and future of domestic tourism and what kind of support they need in order to better operate in the domestic tourism market.

The survey was conducted as an internet questionnaire that was distributed with the help of stakeholders in different countries and in social media groups. The survey link was shared in the countries' tourism networks (for example, through the DMOs and business support organisations). The link was also distributed in social media through paid for marketing targeting tourism industry actors. Additionally, since the initial distribution gave low number of responses in some countries, additional responses were also collected from an internet panel where the survey was directed to people working in the tourism sector. The survey was open for responses from November 2022 to January 2023. The survey received in total 480 responses (distribution via link: 295 pcs, panel: 185 pcs).

The focus of the survey was to map the needs of enterprises regarding domestic tourism, emphasising an explorative approach; therefore, representative sampling was not the key priority while conducting the survey. The results should be viewed as the opinions of the collected sample of people working in the tourism industry, and they are not representative of the whole tourism industry. In particular, the low number of responses from Denmark, Norway and the autonomous areas must be taken into account when interpreting the survey results.

## Key results

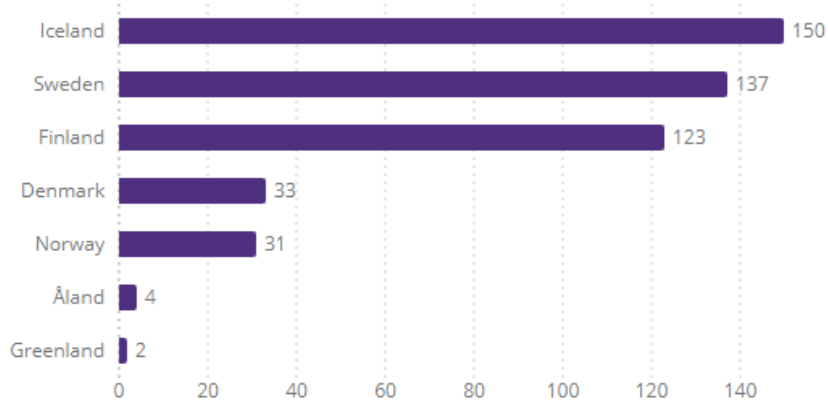
34 %	expect the <b>share of domestic tourism of their revenue to increase in the next three years</b> . 20 % expect the share to decrease.
73 %	are <b>interested in attracting more domestic tourists</b> in the future. 9 % are not interested in that.
43 %	have <b>created, developed or received useful practices to enhance domestic tourism in their enterprise</b> or organization during the pandemic.
44 %	think that <b>marketing campaigns to increase domestic tourism</b> would <b>benefit the domestic tourism in their region</b> . Additionally, <b>opportunities to collaborate and network with other businesses</b> and <b>developing the local infrastructure, transportation, and accessibility</b> were seen as beneficial by many (both 40 %).
51 %	think that <b>the most significant pull factors for domestic tourism</b> in the next three years is <b>the increase of interest in nature tourism destinations</b> . Also, <b>the increase of interest in sustainable and responsible modes of tourism</b> is strongly considered as a pull factor (49 %).

## Background information

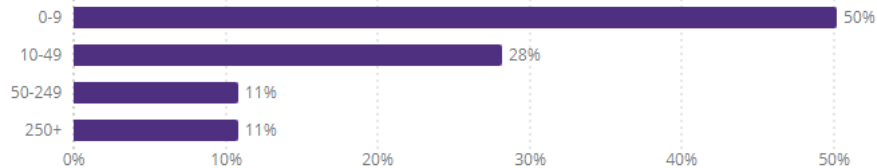
*Photo: Benjamin Suomela/norden.org, licenced under CC BY-NC-SA 4.0*

# Background information

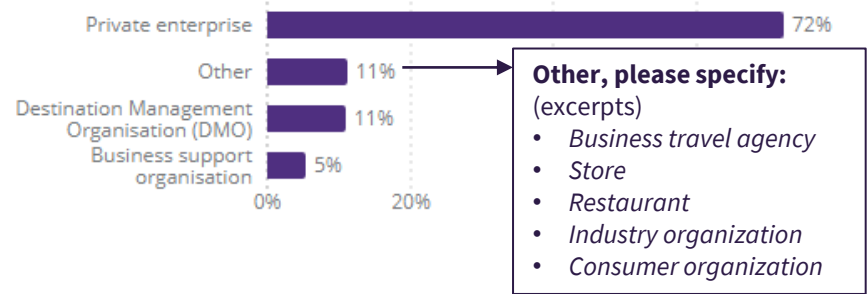
Country or autonomous region 480



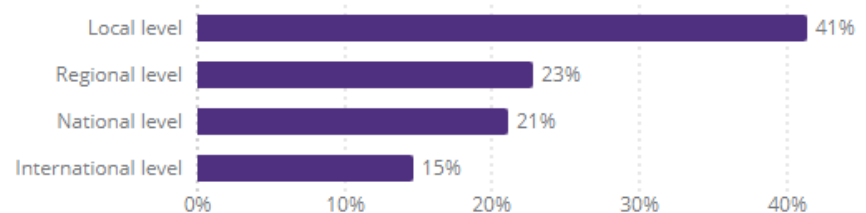
What is the (peak level) number of employees in your company? 480



What type of organisation do you represent? 480



Does your organization mainly operate on 478



## Background information – By country

Does your organization mainly operate on...	Iceland (n=150)	Sweden (n=137)	Finland (n=123)	Norway (n=31)	Denmark (n=31)
Local level	<b>49 %</b>	<b>51 %</b>	25 %	<b>42 %</b>	29 %
Regional level	21 %	19 %	<b>30 %</b>	19 %	23 %
National level	18 %	16 %	<b>27 %</b>	19 %	<b>32 %</b>
International level	12 %	14 %	18 %	19 %	16 %

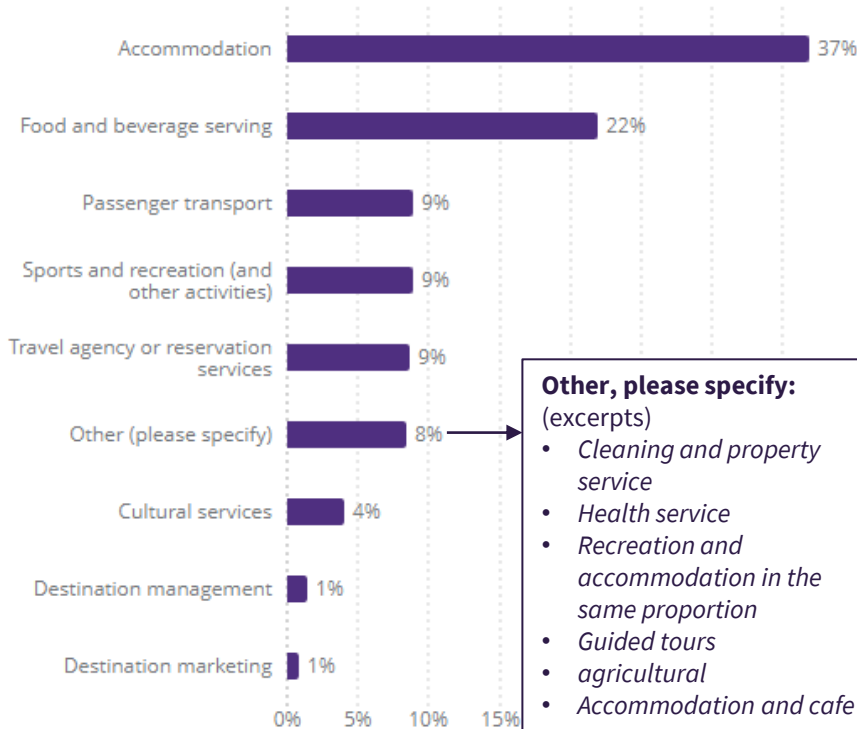
What type of organisation do you represent?	Iceland (n=150)	Sweden (n=137)	Finland (n=123)	Norway (n=31)	Denmark (n=33)
Private enterprise	<b>80 %</b>	74 %	67 %	71 %	61 %
Other	9 %	11 %	18 %	6 %	0 %
Destination Management Organisation (DMO)	7 %	14 %	8 %	19 %	<b>24 %</b>
Business support organisation	5 %	1 %	7 %	3 %	<b>15 %</b>

What is the (peak level) number of employees in your company?	Iceland (n=150)	Sweden (n=137)	Finland (n=123)	Norway (n=31)	Denmark (n=33)
0-9	<b>71 %</b>	35 %	<b>51 %</b>	39 %	27 %
10-49	23 %	<b>39 %</b>	20 %	32 %	<b>36 %</b>
50-249	4 %	14 %	11 %	13 %	<b>24 %</b>
250+	2 %	12 %	<b>17 %</b>	<b>16 %</b>	12 %

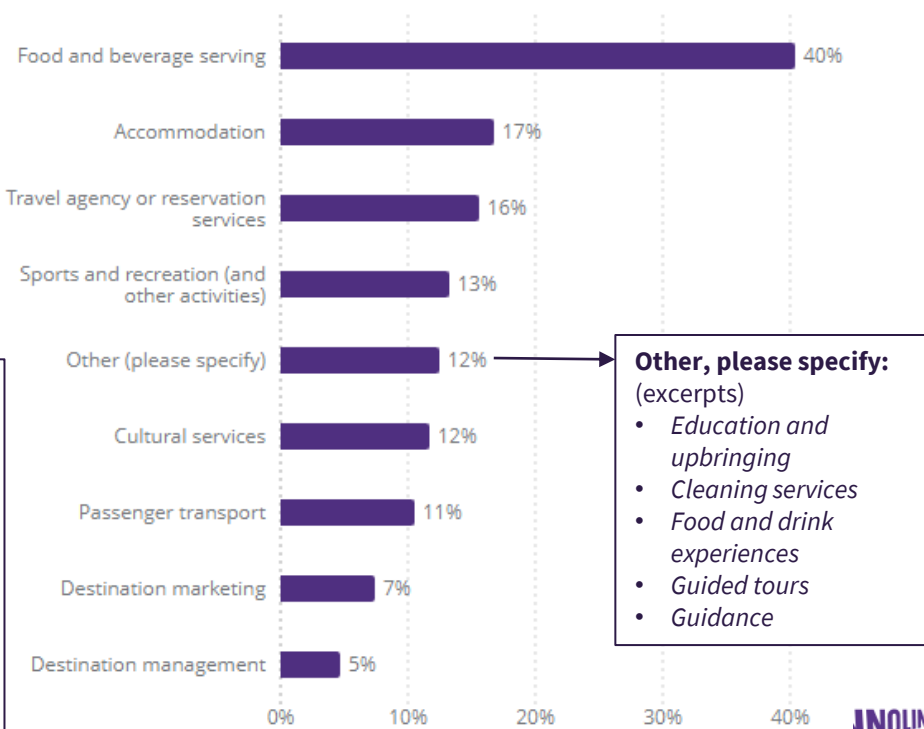
Groups of at least 5 answers are included in the tables.

# Background information

Please select your organisation's main line of business 347



Is your organisation engaged in other lines of businesses 257



## Background information – By country

Please select your organisation's main line of business	Iceland (n=120)	Sweden (n=101)	Finland (n=82)	Norway (n=22)	Denmark (n=20)
Accommodation	40 %	42 %	38 %	27 %	0 %
Food and beverage serving	6 %	27 %	27 %	59 %	35 %
Passenger transport	17 %	2 %	7 %	0 %	15 %
Sports and recreation (and other activities)	8 %	10 %	10 %	9 %	5 %
Travel agency or reservation services	14 %	2 %	4 %	5 %	30 %
Other (please specify)	9 %	9 %	10 %	0 %	5 %
Cultural services	6 %	5 %	1 %	0 %	5 %
Destination management	0 %	3 %	1 %	0 %	5 %
Destination marketing	0 %	1 %	2 %	0 %	0 %

The top 3 of each country highlighted in green.

Groups of at least 5 answers are included in the tables.

## Domestic tourism in general

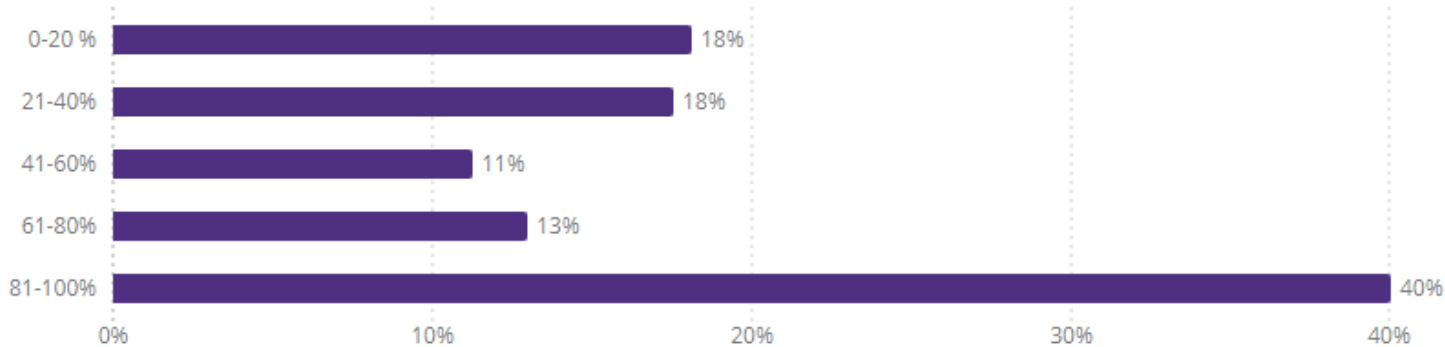
*Photo: Yadid Levy/norden.org, licenced under CC BY-NC-SA 4.0*



# The share of tourism in general

What is approximately the share of tourism in general of your revenue? 347

Asked if "Private enterprise".



By country:	Iceland (n=120)	Sweden (n=101)	Finland (n=82)	Norway (n=22)	Denmark (n=20)
0-20 %	3 %	25 %	27 %	32 %	20 %
21-40%	5 %	19 %	26 %	41 %	30 %
41-60%	8 %	18 %	7 %	5 %	20 %
61-80%	8 %	16 %	18 %	0 %	20 %
81-100%	75 %	23 %	22 %	23 %	10 %

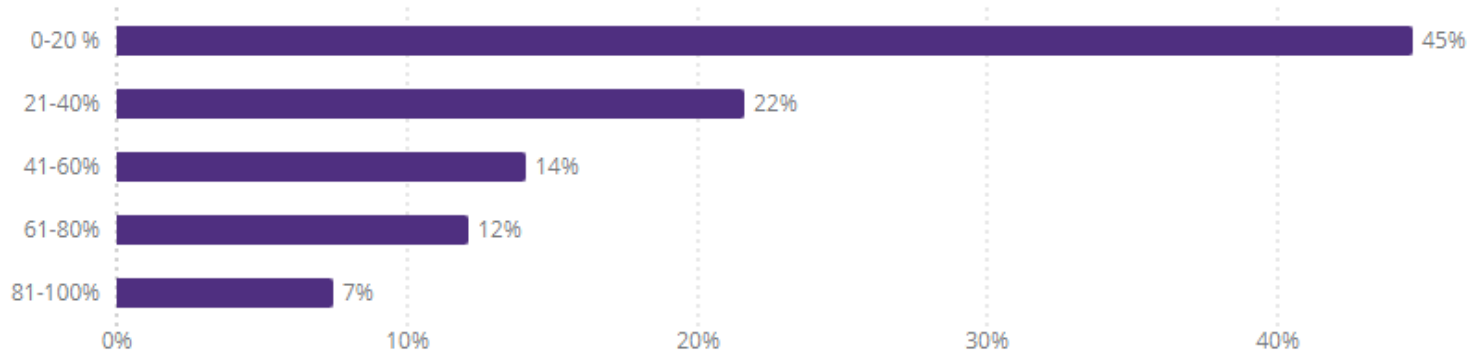
By operating level:	Local level (n=139)	Regional level (n=71)	National level (n=78)	International level (n=57)
0-20 %	24 %	10 %	19 %	12 %
21-40%	14 %	31 %	17 %	11 %
41-60%	10 %	18 %	8 %	11 %
61-80%	13 %	7 %	13 %	21 %
81-100%	39 %	34 %	44 %	46 %

Groups of at least 5 answers are included in the tables.

# The share of domestic tourism

What is approximately domestic tourism's share of your revenue? 347

Asked if "Private enterprise".



By country:	Iceland (n=120)	Sweden (n=101)	Finland (n=82)	Norway (n=22)	Denmark (n=20)
0-20 %	<b>72 %</b>	27 %	28 %	<b>41 %</b>	<b>45 %</b>
21-40%	19 %	30 %	17 %	23 %	15 %
41-60%	6 %	21 %	16 %	18 %	20 %
61-80%	2 %	<b>18 %</b>	<b>20 %</b>	5 %	<b>20 %</b>
81-100%	2 %	5 %	<b>20 %</b>	<b>14 %</b>	0 %

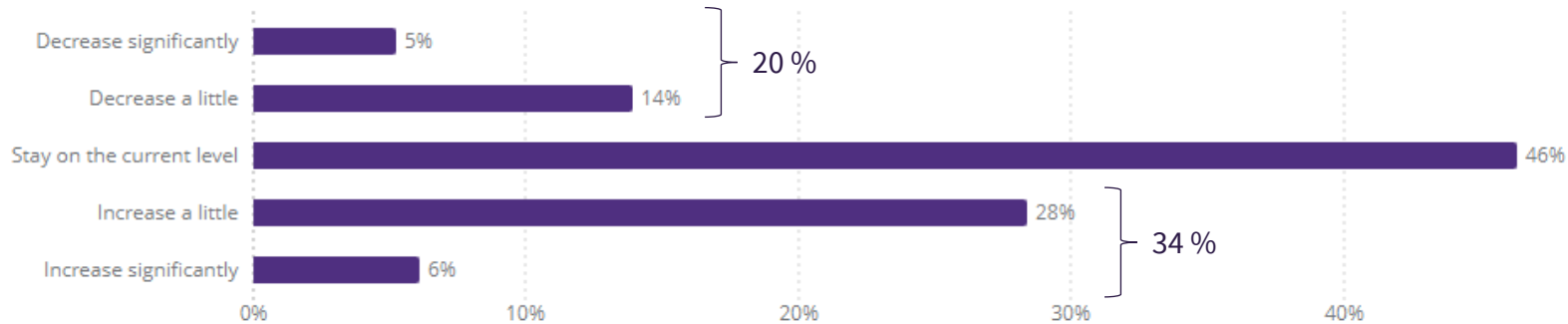
By operating level:	Local level (n=139)	Regional level (n=71)	National level (n=78)	International level (n=57)
0-20 %	<b>55 %</b>	37 %	38 %	39 %
21-40%	27 %	25 %	14 %	16 %
41-60%	11 %	23 %	8 %	21 %
61-80%	4 %	7 %	<b>23 %</b>	<b>23 %</b>
81-100%	4 %	8 %	<b>17 %</b>	2 %

Groups of at least 5 answers are included in the tables.

# Expectations regarding domestic tourism

In the next three years, do you expect the share of the domestic tourism of your revenue to... 345

Asked if "Private enterprise".



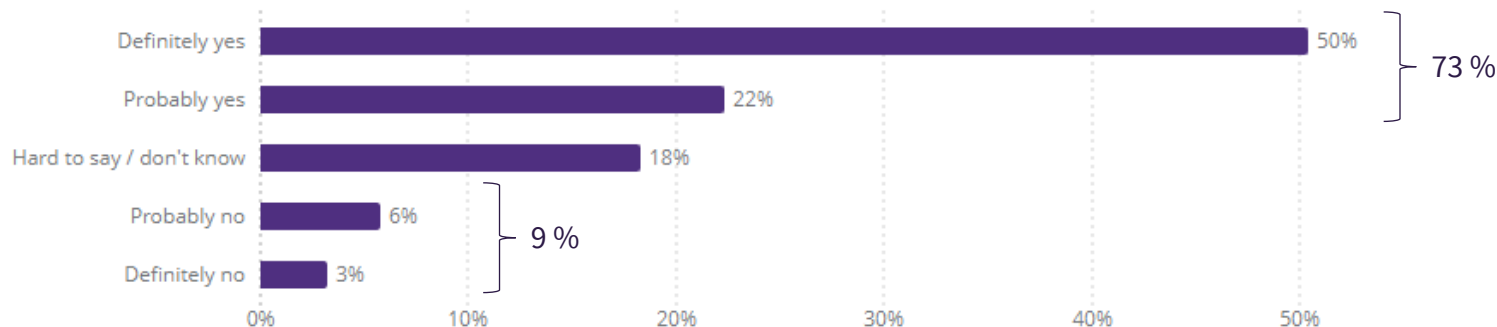
By country:	Iceland (n=120)	Sweden (n=101)	Finland (n=80)	Norway (n=22)	Denmark (n=20)	By operating level:	Local level (n=138)	Regional level (n=70)	National level (n=78)	International level (n=57)
Decrease significantly	8 %	4 %	1 %	9 %	5 %	Decrease significantly	8 %	7 %	0 %	4 %
Decrease a little	8 %	14 %	14 %	23 %	40 %	Decrease a little	17 %	19 %	8 %	9 %
Stay on the current level	56 %	46 %	38 %	41 %	40 %	Stay on the current level	49 %	39 %	50 %	47 %
Increase a little	22 %	32 %	41 %	23 %	10 %	Increase a little	22 %	33 %	31 %	33 %
Increase significantly	7 %	5 %	6 %	5 %	5 %	Increase significantly	4 %	3 %	12 %	7 %

Groups of at least 5 answers are included in the tables.

# Attracting more domestic tourists

In general, are you interested in attracting more domestic tourists in the future? 345

Asked if "Private enterprise".



By country:	Iceland (n=120)	Sweden (n=101)	Finland (n=80)	Norway (n=22)	Denmark (n=20)
Definitely yes	47 %	56 %	51 %	50 %	42 %
Probably yes	23 %	15 %	29 %	18 %	32 %
Hard to say / don't know	16 %	23 %	15 %	23 %	16 %
Probably no	10 %	1 %	5 %	9 %	5 %
Definitely no	4 %	5 %	0 %	0 %	5 %

By operating level:	Local level (n=138)	Regional level (n=70)	National level (n=78)	International level (n=57)
Definitely yes	49 %	55 %	54 %	43 %
Probably yes	17 %	25 %	24 %	29 %
Hard to say / don't know	24 %	8 %	18 %	18 %
Probably no	7 %	10 %	1 %	5 %
Definitely no	4 %	1 %	3 %	5 %

Groups of at least 5 answers are included in the tables.

# Please describe the three most typical preferences for domestic tourists in one or two words:

The most mentioned words by country.

## Iceland (n=128):

- *Gott / Góða / Góð / Góðan* (n=52)
- *Þjónusta / Þjónusta* (n=28)
- *Verð* (n=20)
- *Náttúra / Náttúru* (n=17)
- *Afþreying / Afþreyingu* (n=15)
- *Mat* (n=13)
- *Ódýrt / Ódýra* (n=13)
- *Veður* (n=10)
- *Gistingu* (n=10)
- *Upplifun* (n=10)

## Sweden (n=90):

- *Mat / Matupplevelser* (n=23)
- *Natur / Naturupplevelser* (n=16)
- *Bra / God / Gott* (n=15)
- *Upplevelse* (n=8)
- *Prisvärt / Pris* (n=8)
- *Dryck* (n=7)
- *Service* (n=7)
- *Evenemang* (n=5)
- *Kultur* (n=4)
- *Kvalitet* (n=4)

## Finland (n=99):

- *Luonto* (n=28)
- *Hinta / Edullinen / Edullisuus / Hinnoittelu* (n=18)
- *Hyvä / Hyvät* (n=15)
- *Rauha / Rauhallisuus* (n=13)
- *Elämykset / Elämys* (n=13)
- *Helppous / Helppo* (n=13)
- *Palvelut / Palvelu* (n=10)
- *Ruoka* (n=9)
- *Aktiviteetit / Aktiviteetti* (n=8)
- *Sijainti* (n=6)

## Norway (n=22):

- *Opplevelse* (n=5)
- *Mat / Spisegjester* (n=5)
- *Natur / Naturopplevelser* (n=4)
- *Lokal* (n=2)
- *Pris* (n=2)

## Denmark (n=23):

- *Natur / Naturen / Naturoplevelser* (n=8)
- *Kultur / Kulturoplevelser / Kulturarv* (n=6)
- *Mad* (n=4)
- *Gode / God* (n=4)
- *Outdoor* (n=3)
- *Afslapning* (n=2)
- *Oplevelser* (n=2)
- *Tryghed* (n=2)

# Impacts of the pandemic

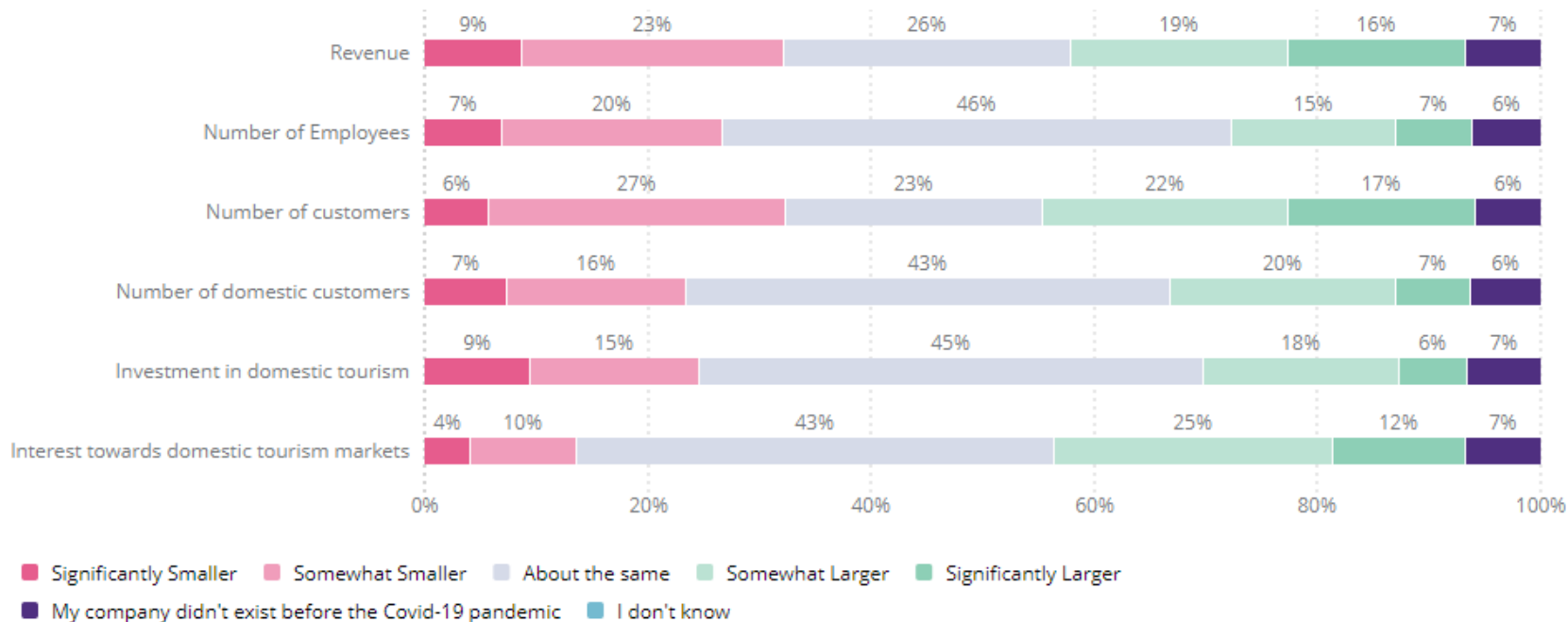
*Photo: Johannes Jansson/norden.org, licenced under CC BY-NC-SA 4.0*



# Impacts of the pandemic

In comparison to time before Covid-19 pandemic, what is the situation in your company now? 343

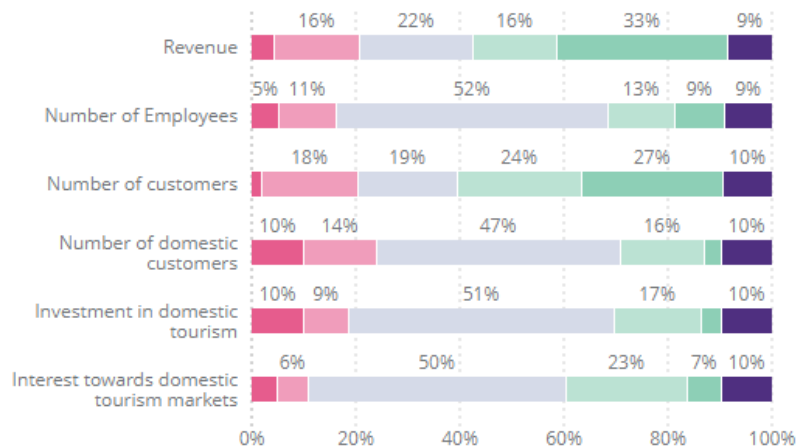
Asked if "Private enterprise".



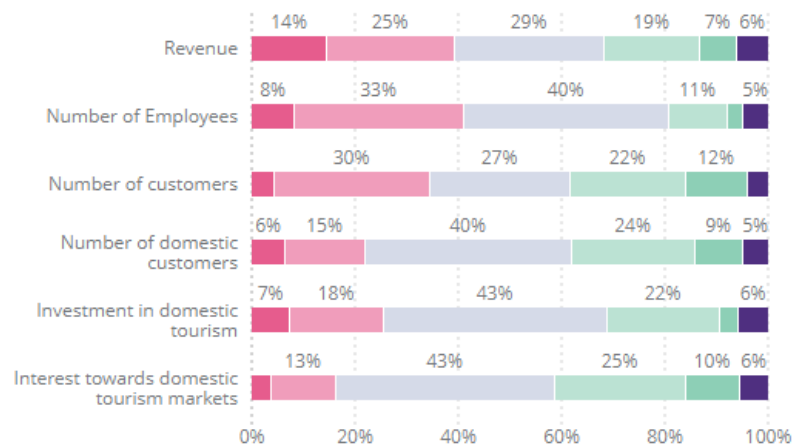
# Impacts of the pandemic – By country

In comparison to time before Covid-19 pandemic, what is the situation in your company now?

Iceland (n=119):



Sweden (n=100):



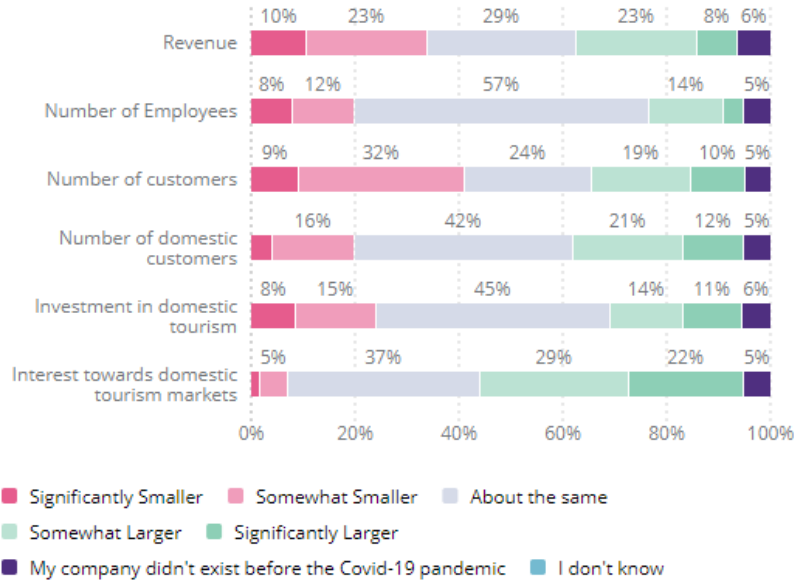
■ Significantly Smaller
 ■ Somewhat Smaller
 ■ About the same
 ■ Somewhat Larger
 ■ Significantly Larger
 ■ My company didn't exist before the Covid-19 pandemic
 ■ I don't know

■ Significantly Smaller
 ■ Somewhat Smaller
 ■ About the same
 ■ Somewhat Larger
 ■ Significantly Larger
 ■ My company didn't exist before the Covid-19 pandemic
 ■ I don't know

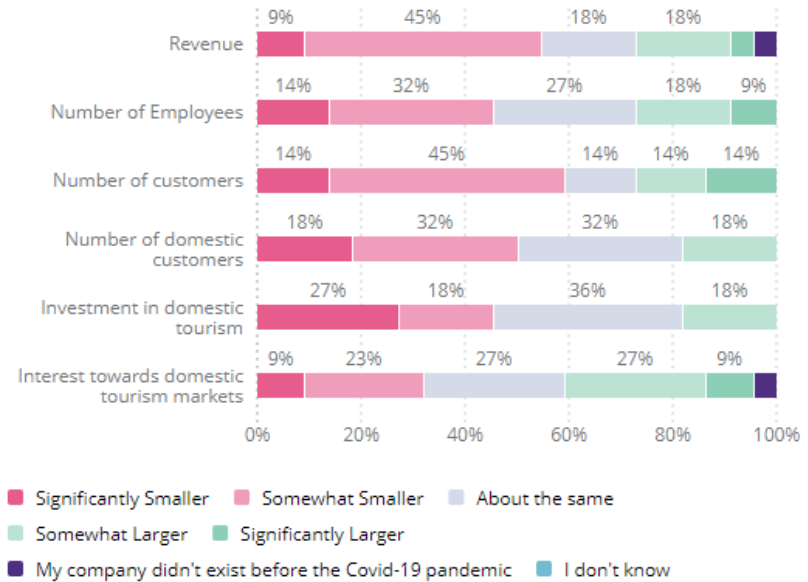
# Impacts of the pandemic – By country

In comparison to time before Covid-19 pandemic, what is the situation in your company now?

Finland (n=80):



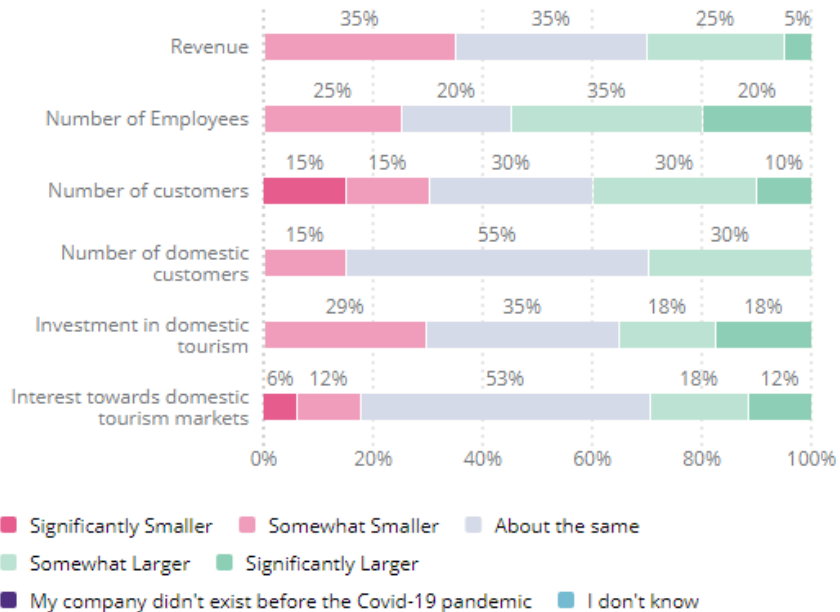
Norway (n=22):



# Impacts of the pandemic – By country

In comparison to time before Covid-19 pandemic, what is the situation in your company now?

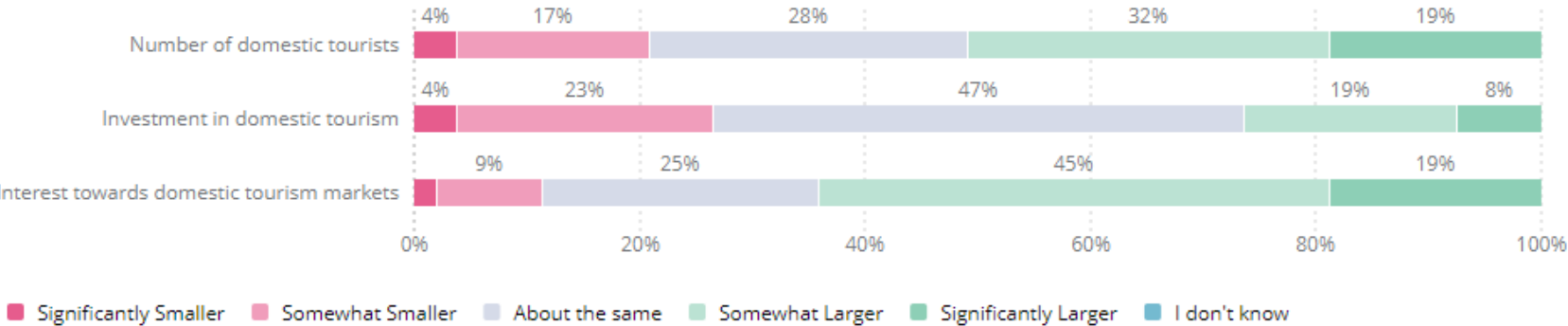
Denmark (n=20):



# Impacts of the pandemic

Asked if "Destination Management Organisation (DMO)".

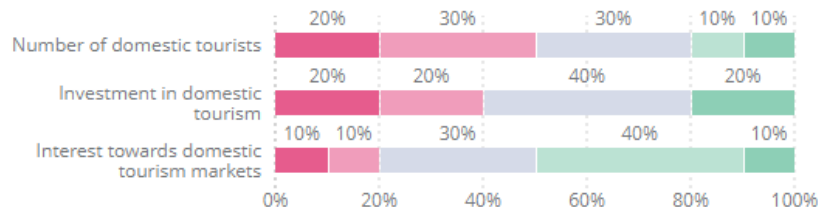
In comparison to time before Covid-19 pandemic, what is the situation in your region now? 53



# Impacts of the pandemic – By country

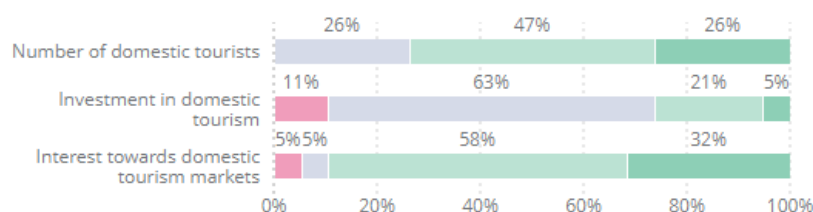
In comparison to time before Covid-19 pandemic, what is the situation in your region now?

Iceland (n=10):



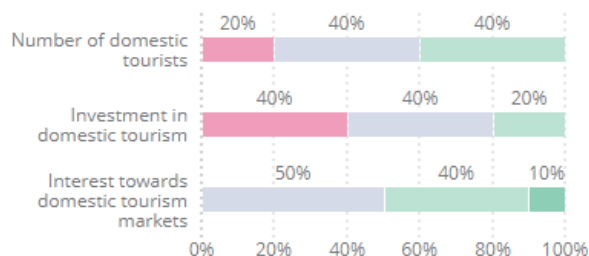
Significantly Smaller Somewhat Smaller About the same Somewhat Larger Significantly Larger I don't know

Sweden (n=19):



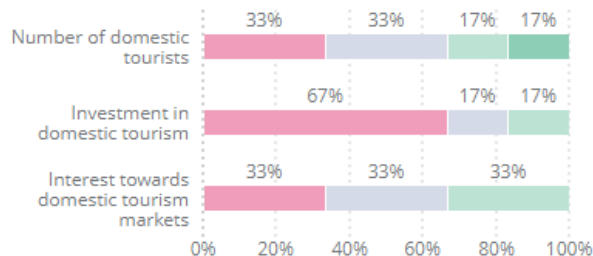
Significantly Smaller Somewhat Smaller About the same Somewhat Larger Significantly Larger I don't know

Finland (n=10):



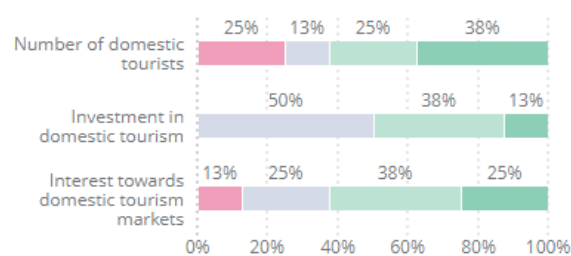
Significantly Smaller Somewhat Smaller About the same Somewhat Larger Significantly Larger I don't know

Norway (n=6):



Significantly Smaller Somewhat Smaller About the same Somewhat Larger Significantly Larger I don't know

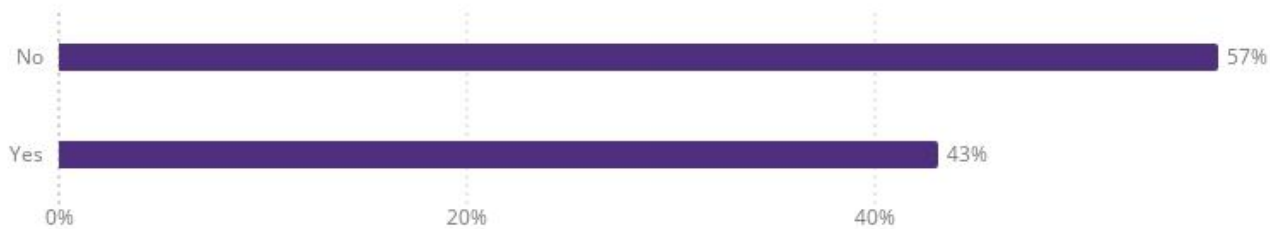
Denmark (n=8):



Significantly Smaller Somewhat Smaller About the same Somewhat Larger Significantly Larger I don't know

# Useful practices to enhance domestic tourism

During the pandemic, have you created, developed or received useful practices to enhance domestic tourism in your enterprise or organization? 480



By country:	Iceland (n=150)	Sweden (n=137)	Finland (n=123)	Norway (n=31)	Denmark (n=33)
No	64 %	61 %	50 %	45 %	48 %
Yes	36 %	39 %	50 %	55 %	52 %

By organisation type:	Private enterprise (n=347)	Other (n=54)	Destination Management Organisation (DMO) (n=53)	Business support organisation (n=26)
No	59 %	70 %	34 %	50 %
Yes	41 %	30 %	66 %	50 %

Groups of at least 5 answers are included in the tables.

# If yes: What kinds of practices have you created, developed or received? (excerpts)

## Iceland

- *New services that appeal to locals*
- *Greater automation of work processes*
- *More highland hikes for Icelanders, packages with accommodation with us and food and a hike for 1 day.*
- *Organized domestic tours*
- *Virtual tours are still in development*
- *The owners of the company used the time to expand the company, which is now being completed. With expansion, products such as beer scrub and kelp scrub are added, as well as the company establishing a brewery. The accommodation is now bigger and the spa facilities are also expanding considerably.*

## Sweden

- *Faster product development mainly for nature tourism. Closer dialogue with housing facilities in terms of product development*
- *Digital marketing*
- *Advertising*
- *Through associations and new friends, my network of contacts expanded.*
- *Local offers*

## Finland

- *availability of disinfectant at the entrance and COVID testing.*
- *Downsizing of staff*
- *More Self-service*
- *Wider local cooperation.*
- *Content for domestic tourism, targeted promotion of domestic destinations*

## Denmark

- *Quality*
- *Strengthened my company's social media*
- *Partnerships and company agreements with large companies in Denmark*

## Norway

- *We invest much more and market ourselves much more on sustainability and climate friendliness. I see that this is something that many people are interested in, and we believe that it is something that everyone must show in the future.*
- *We have created packages and adopted a more appropriate booking system*

## Development of domestic tourism

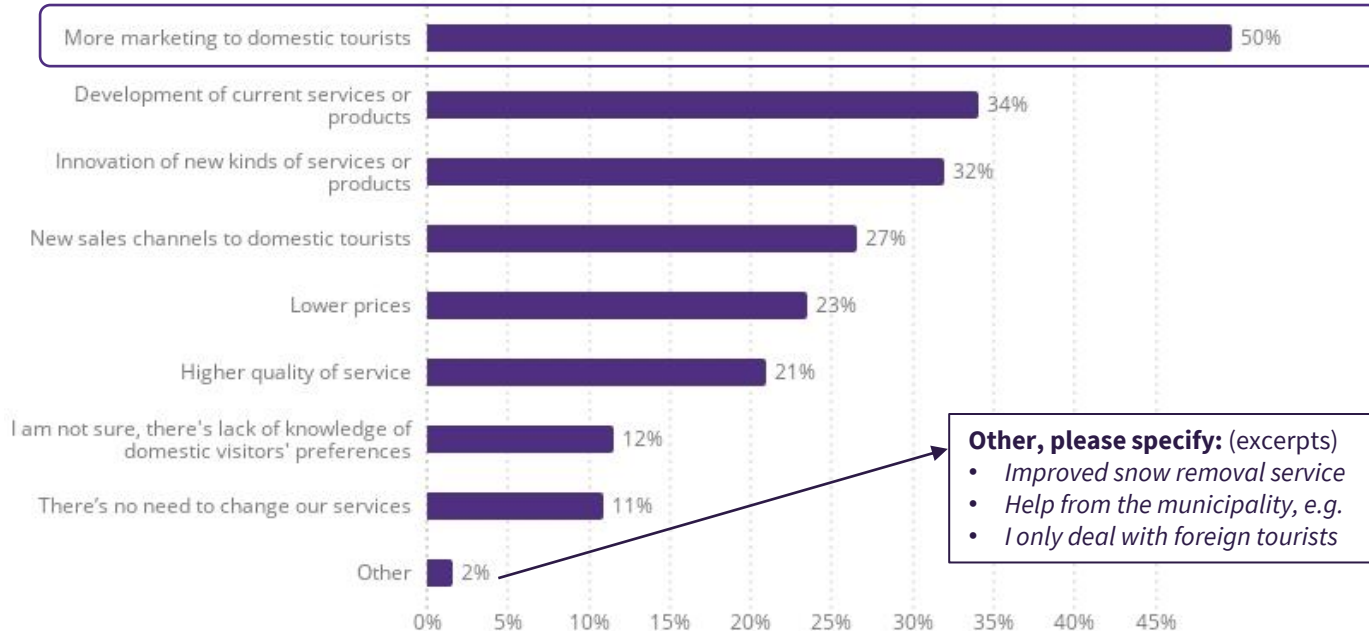
*Photo: Benjamin Suomela / Norden.org, licenced under CC BY-NC-SA 4.0*



# Meeting the needs of domestic tourists

How do you think the offering of your company could be developed to better meet the needs of domestic tourists? (Choose up to 3 alternatives) 320

Asked if "Private enterprise".



# Meeting the needs of domestic tourists

How do you think the offering of your company could be developed to better meet the needs of domestic tourists?

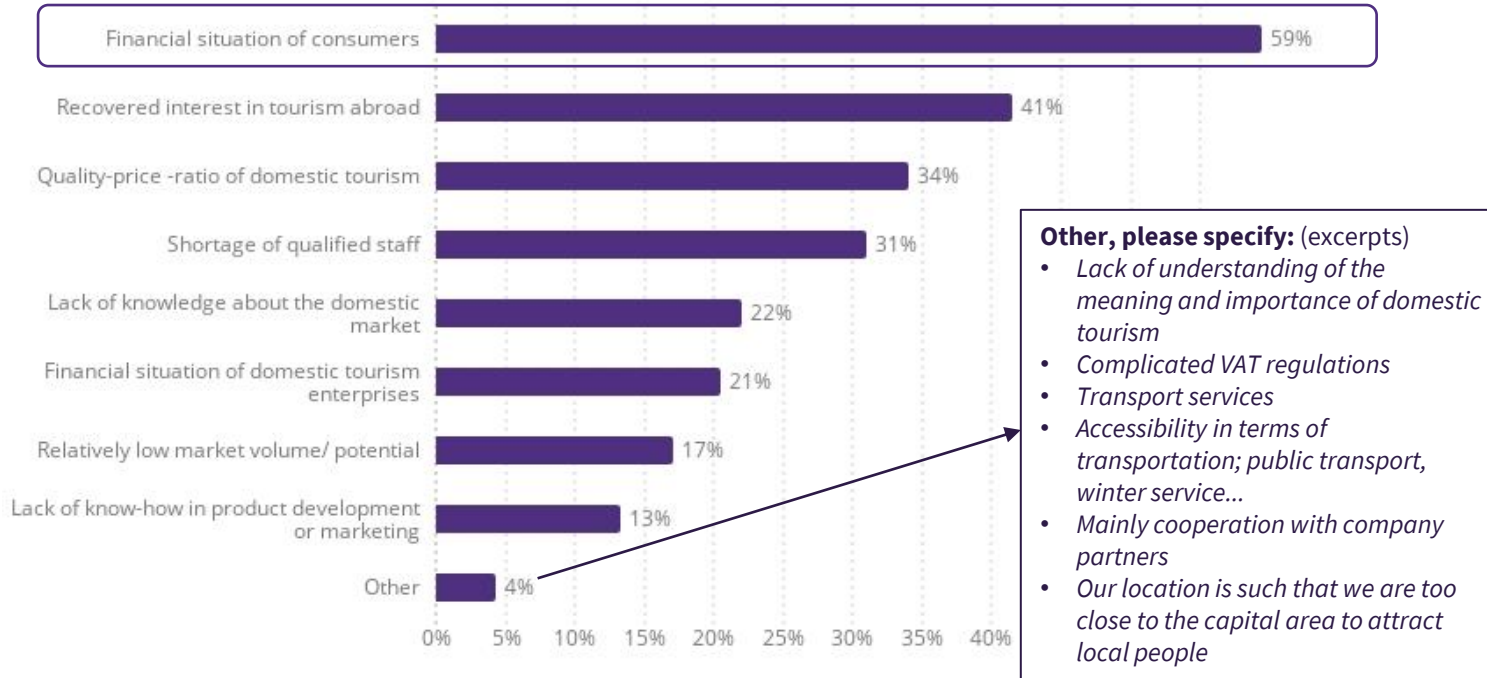
By country:	Iceland (n=117)	Sweden (n=96)	Finland (n=66)	Norway (n=19)	Denmark (n=20)
More marketing to domestic tourists	52 %	50 %	45 %	47 %	45 %
Development of current services or products	32 %	32 %	<b>41 %</b>	21 %	<b>45 %</b>
Innovation of new kinds of services or products	27 %	25 %	<b>45 %</b>	26 %	<b>45 %</b>
New sales channels to domestic tourists	28 %	25 %	24 %	<b>47 %</b>	15 %
Lower prices	23 %	25 %	18 %	26 %	<b>35 %</b>
Higher quality of service	12 %	<b>30 %</b>	21 %	21 %	<b>30 %</b>
I am not sure, there's lack of knowledge of domestic visitors' preferences	<b>17 %</b>	8 %	11 %	11 %	0 %
There's no need to change our services	15 %	10 %	6 %	0 %	15 %
Other	3 %	1 %	0 %	0 %	0 %

Groups of at least 5 answers are included in the tables.

By operating level:	Local level (n=132)	Regional level (n=65)	National level (n=65)	International level (n=56)
More marketing to domestic tourists	<b>55 %</b>	46 %	45 %	46 %
Development of current services or products	33 %	32 %	35 %	38 %
Innovation of new kinds of services or products	23 %	<b>45 %</b>	28 %	<b>43 %</b>
New sales channels to domestic tourists	<b>29 %</b>	22 %	<b>31 %</b>	23 %
Lower prices	20 %	<b>34 %</b>	15 %	25 %
Higher quality of service	17 %	15 %	<b>25 %</b>	<b>30 %</b>
I am not sure, there's lack of knowledge of domestic visitors' preferences	11 %	14 %	14 %	7 %
There's no need to change our services	13 %	9 %	11 %	9 %
Other	2 %	2 %	2 %	0 %

# The most significant challenges

In your opinion, which are the most significant challenges for domestic tourism in the next three years? (Choose up to 3 answers) 468



# The most significant challenges

In your opinion, which are the most significant challenges for domestic tourism in the next three years?

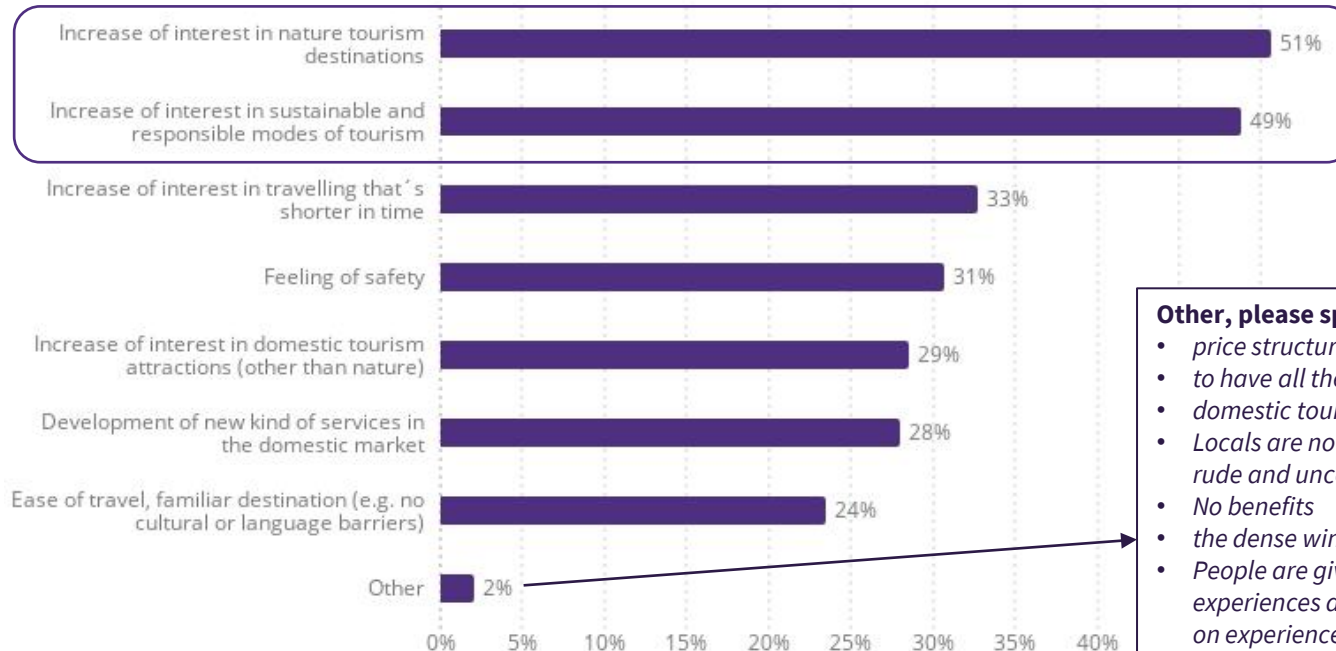
By country:	Iceland (n=146)	Sweden (n=133)	Finland (n=121)	Norway (n=29)	Denmark (n=33)
Financial situation of consumers	38 %	<b>68 %</b>	<b>79 %</b>	<b>62 %</b>	42 %
Recovered interest in tourism abroad	<b>51 %</b>	40 %	36 %	34 %	30 %
Quality-price -ratio of domestic tourism	<b>40 %</b>	24 %	<b>37 %</b>	34 %	<b>39 %</b>
Shortage of qualified staff	23 %	31 %	<b>40 %</b>	<b>38 %</b>	24 %
Lack of knowledge about the domestic market	<b>30 %</b>	22 %	14 %	14 %	<b>27 %</b>
Financial situation of domestic tourism enterprises	18 %	21 %	17 %	24 %	<b>39 %</b>
Relatively low market volume/ potential	<b>24 %</b>	11 %	16 %	17 %	15 %
Lack of know-how in product development or marketing	16 %	11 %	12 %	7 %	<b>21 %</b>
Other	7 %	2 %	2 %	10 %	6 %

Groups of at least 5 answers are included in the tables.

By organisation type:	Private enterprise (n=336)	Other (n=54)	Destination Management Organisation (DMO) (n=52)	Business support organisation (n=26)
Financial situation of consumers	58 %	61 %	<b>67 %</b>	54 %
Recovered interest in tourism abroad	40 %	37 %	44 %	<b>62 %</b>
Quality-price -ratio of domestic tourism	<b>35 %</b>	<b>37 %</b>	27 %	31 %
Shortage of qualified staff	27 %	30 %	<b>52 %</b>	<b>42 %</b>
Lack of knowledge about the domestic market	22 %	<b>33 %</b>	12 %	23 %
Financial situation of domestic tourism enterprises	20 %	<b>28 %</b>	17 %	23 %
Relatively low market volume/ potential	<b>18 %</b>	<b>17 %</b>	<b>19 %</b>	8 %
Lack of know-how in product development or marketing	11 %	13 %	<b>23 %</b>	19 %
Other	4 %	6 %	6 %	0 %

# The most significant pull factors

In your opinion, which are the most significant pull factors for domestic tourism in the next three years? (Choose up to 3 answers) 336



**The overall results are presented without Swedish answers**, because of the incorrect translation “pull factors” → “utmaningarna” (= challenges).

## Other, please specify: (excerpts)

- price structure of entertainment programs
- to have all the infrastructure in place
- domestic tourists do not buy day trips
- Locals are not an interesting target group, rude and uncontrollable.
- No benefits
- the dense winter season
- People are giving more gift certificates for experiences and others are spending more on experiences

# The most significant pull factors

In your opinion, which are the most significant pull factors for domestic tourism in the next three years?

By country:	Iceland (n=147)	Finland (n=119)	Norway (n=31)	Denmark (n=33)	Sweden (n=131)
Increase of interest in nature tourism destinations	50 %	54 %	45 %	45 %	34 %
Increase of interest in sustainable and responsible modes of tourism	45 %	54 %	52 %	52 %	41 %
Increase of interest in travelling that 's shorter in time	29 %	34 %	42 %	33 %	30 %
Feeling of safety	28 %	38 %	26 %	21 %	21 %
Increase of interest in domestic tourism attractions (other than nature)	33 %	24 %	29 %	30 %	28 %
Development of new kind of services in the domestic market	33 %	21 %	19 %	39 %	37 %
Ease of travel, familiar destination (e.g. no cultural or language barriers)	22 %	26 %	19 %	24 %	23 %
Other	4 %	1 %	0 %	0 %	6 %

Groups of at least 5 answers are included in the tables.

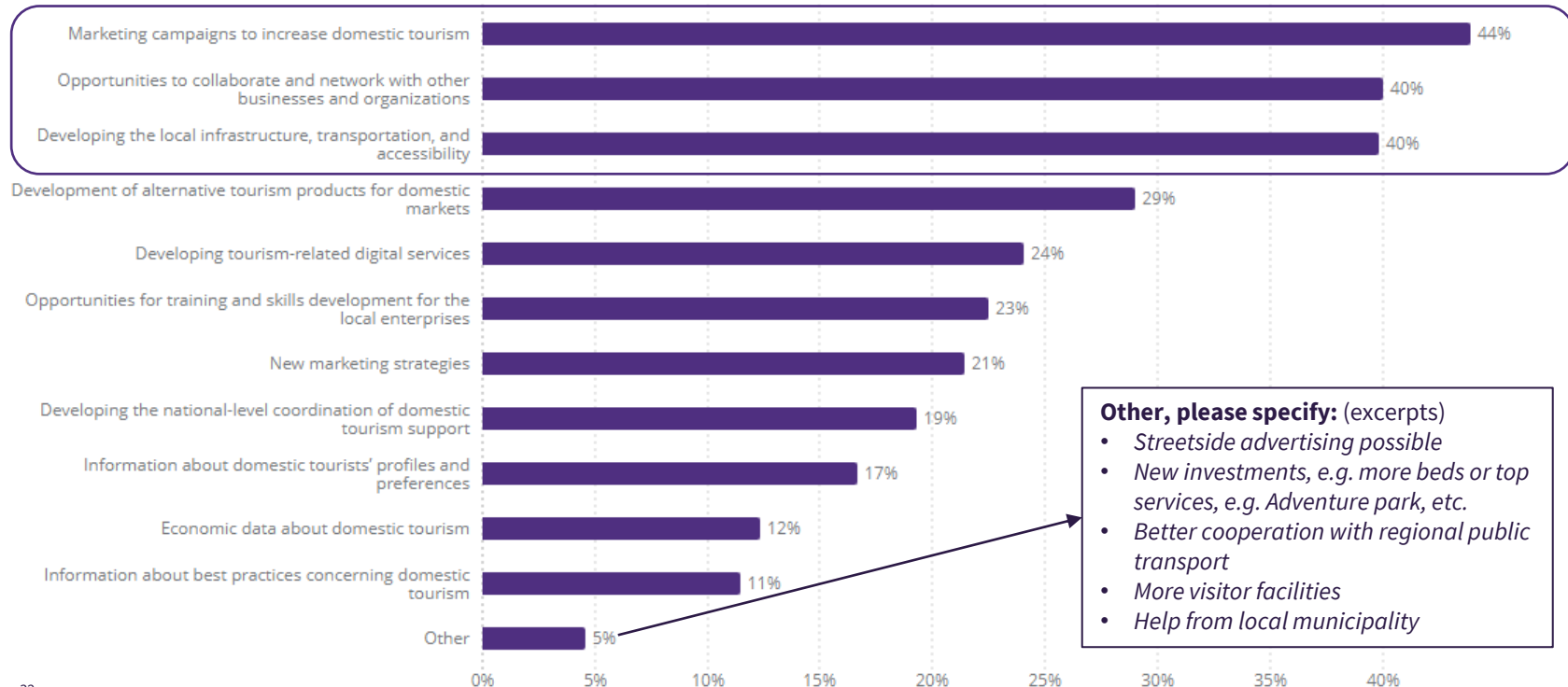
The Swedish answers are also included in the table.  
**The results are not comparable due to a translation error in the Swedish form.**

By organisation type:	Private enterprise (n=242)	Other (n=39)	Destination Management Organisation (DMO) (n=33)	Business support organisation (n=22)
Increase of interest in nature tourism destinations	51 %	46 %	48 %	59 %
Increase of interest in sustainable and responsible modes of tourism	46 %	56 %	55 %	55 %
Increase of interest in travelling that 's shorter in time	30 %	38 %	45 %	32 %
Feeling of safety	29 %	36 %	30 %	36 %
Increase of interest in domestic tourism attractions (other than nature)	28 %	23 %	36 %	36 %
Development of new kind of services in the domestic market	28 %	28 %	30 %	27 %
Ease of travel, familiar destination (e.g. no cultural or language barriers)	23 %	33 %	18 %	18 %
Other	3 %	0 %	0 %	0 %

The Swedish answers are not included in the table.

# Beneficial factors

What would benefit domestic tourism in your region? (Choose up to 4 answers) 462



# Beneficial factors

What would benefit domestic tourism in your region?

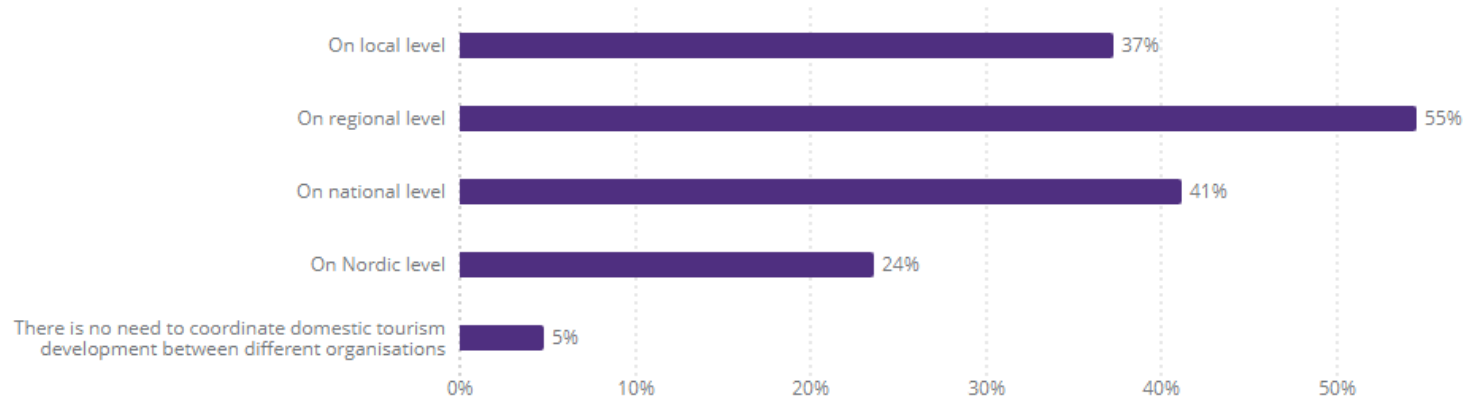
Groups of at least 5 answers are included in the tables.

By country:	Iceland (n=141)	Sweden (n=132)	Finland (n=119)	Norway (n=31)	Denmark (n=33)
Marketing campaigns to increase domestic tourism	49 %	39 %	49 %	42 %	27 %
Opportunities to collaborate and network with other businesses and organizations	43 %	32 %	40 %	48 %	52 %
Developing the local infrastructure, transportation, and accessibility	52 %	33 %	35 %	39 %	30 %
Development of alternative tourism products for domestic markets	35 %	21 %	31 %	23 %	30 %
Developing tourism-related digital services	24 %	24 %	27 %	32 %	6 %
Opportunities for training and skills development for the local enterprises	20 %	24 %	20 %	23 %	27 %
New marketing strategies	17 %	27 %	19 %	26 %	24 %
Developing the national-level coordination of domestic tourism support	22 %	18 %	17 %	23 %	18 %
Information about domestic tourists' profiles and preferences	13 %	20 %	18 %	6 %	15 %
Economic data about domestic tourism	5 %	21 %	9 %	6 %	24 %
Information about best practices concerning domestic tourism	12 %	9 %	12 %	16 %	15 %
Other	7 %	5 %	4 %	0 %	0 %

By organisation type:	Private enterprise (n=330)	Other (n=54)	Destination Management Organisation (DMO) (n=52)	Business support organisation (n=26)
Marketing campaigns to increase domestic tourism	43 %	50 %	38 %	54 %
Opportunities to collaborate and network with other businesses and organizations	38 %	41 %	54 %	31 %
Developing the local infrastructure, transportation, and accessibility	39 %	46 %	37 %	42 %
Development of alternative tourism products for domestic markets	30 %	30 %	17 %	38 %
Developing tourism-related digital services	22 %	28 %	31 %	27 %
Opportunities for training and skills development for the local enterprises	21 %	20 %	27 %	42 %
New marketing strategies	23 %	17 %	25 %	4 %
Developing the national-level coordination of domestic tourism support	18 %	19 %	23 %	23 %
Information about domestic tourists' profiles and preferences	15 %	17 %	21 %	31 %
Economic data about domestic tourism	10 %	22 %	19 %	8 %
Information about best practices concerning domestic tourism	11 %	13 %	13 %	8 %
Other	5 %	4 %	6 %	4 %

# Coordinating domestic tourism development

Do you think domestic tourism development should be coordinated between different organisations? 462



By country:	Iceland (n=141)	Sweden (n=132)	Finland (n=119)	Norway (n=31)	Denmark (n=33)
On local level	28 %	49 %	33 %	<b>55 %</b>	31 %
On regional level	55 %	50 %	<b>66 %</b>	48 %	38 %
On national level	38 %	37 %	<b>45 %</b>	<b>45 %</b>	<b>47 %</b>
On Nordic level	<b>30 %</b>	20 %	20 %	<b>29 %</b>	13 %
There is no need to coordinate domestic tourism development between different organisations	9 %	5 %	2 %	0 %	6 %

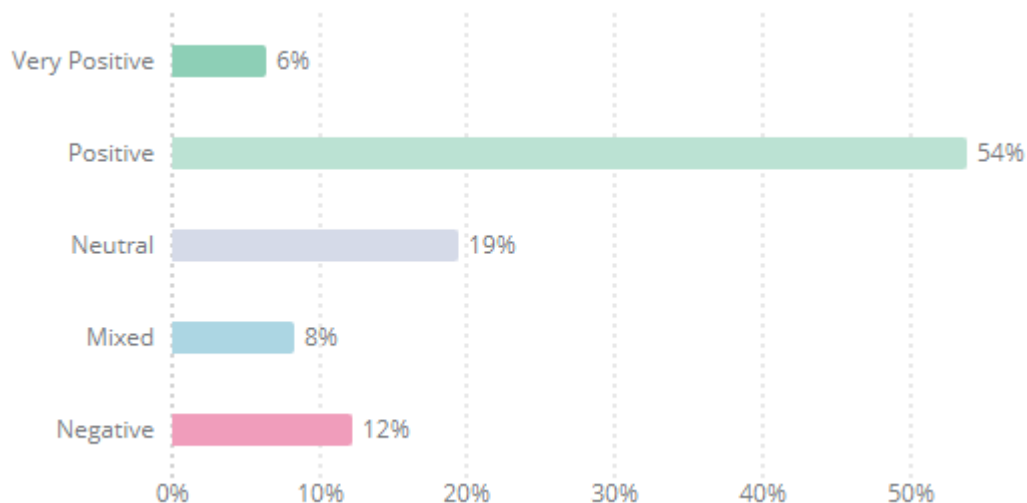
Groups of at least 5 answers are included in the tables.

By organisation type:	Private enterprise (n=330)	Other (n=54)	Destination Management Organisation (DMO) (n=52)	Business support organisation (n=26)
On local level	37 %	<b>41 %</b>	37 %	36 %
On regional level	54 %	56 %	51 %	<b>64 %</b>
On national level	36 %	50 %	<b>57 %</b>	<b>56 %</b>
On Nordic level	21 %	<b>33 %</b>	25 %	28 %
There is no need to coordinate domestic tourism development between different organisations	6 %	4 %	2 %	0 %

# How do you see the potential of domestic tourism in the Nordic countries?

**Sentiment analysis** classifies responses automatically to positive, neutral, negative or mixed classes.

The model is trained on a large and diverse set of real experience data to substantially increase classification quality and minimize uncertainties when the sentiment is not expressed as strongly / clearly. Classification is automatically made by artificial intelligence (other response languages than English have been automatically translated).



## **Very positive / positive:** (excerpts)

- *It is a market that has great potential, especially in relation to ski holidays*
- *Good opportunities for nature tourism*
- *Good potential. There is much that is not found in other countries. No need to go far. Comfortable.*
- *Domestic tourism have a positive potential in nordic countries in light of their appetite to explore nature*

## **Very negative / negative:** (excerpts)

- *The biggest threat is the economic situation*
- *Expensive vacations in Norway*
- *Not the best possible*

Thank you!

*Photo: Johannes Jansson/norden.org, licenced under CC BY-NC-SA 4.0*

