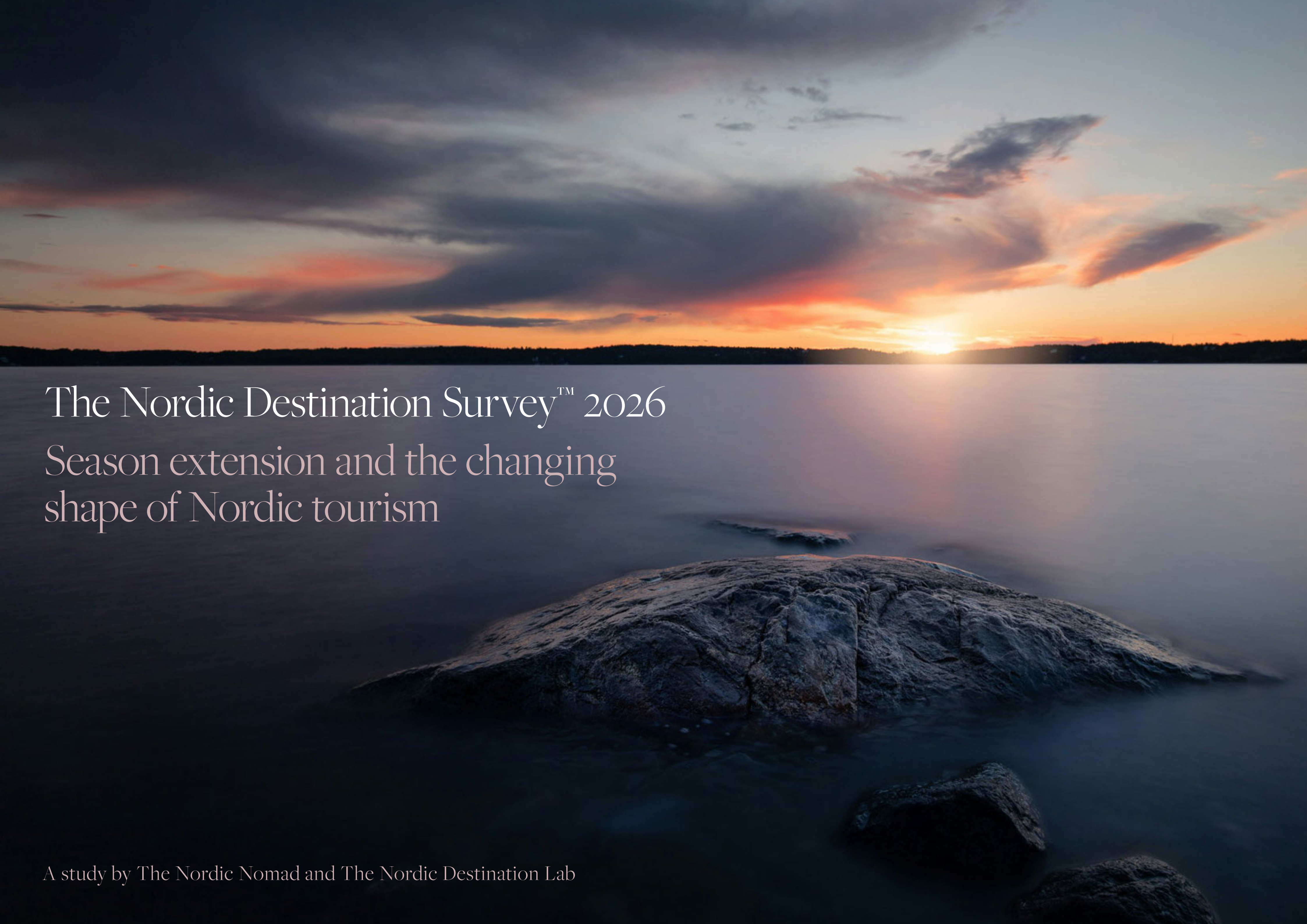


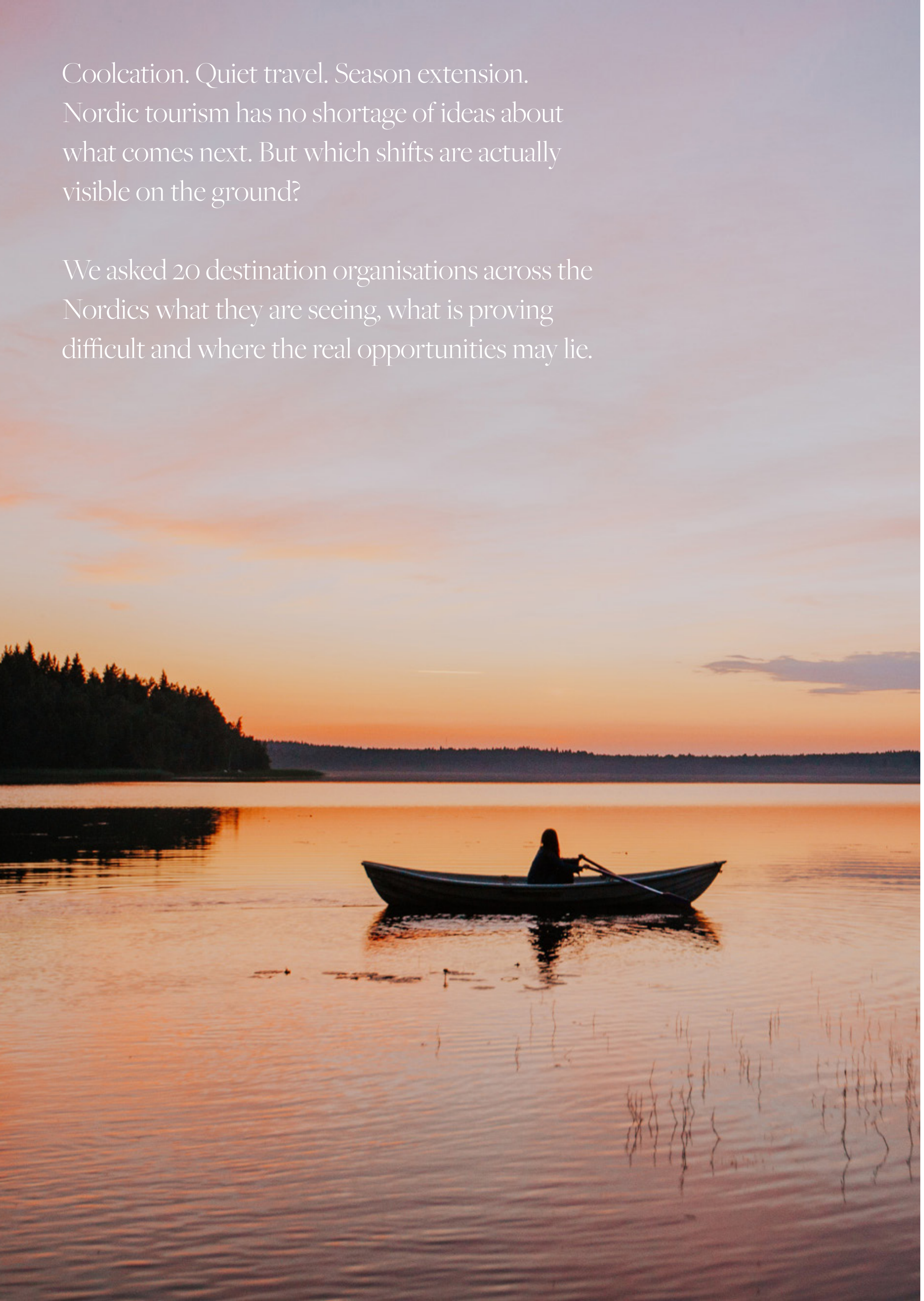
The Nordic Destination Survey™ 2026

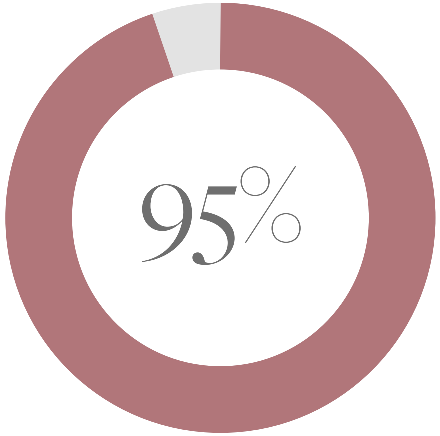
Season extension and the changing shape of Nordic tourism

A study by The Nordic Nomad and The Nordic Destination Lab

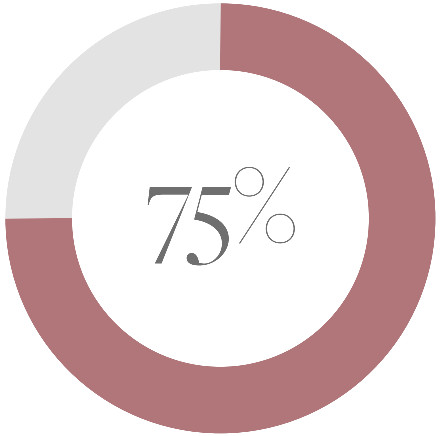
Coolcation. Quiet travel. Season extension. Nordic tourism has no shortage of ideas about what comes next. But which shifts are actually visible on the ground?

We asked 20 destination organisations across the Nordics what they are seeing, what is proving difficult and where the real opportunities may lie.

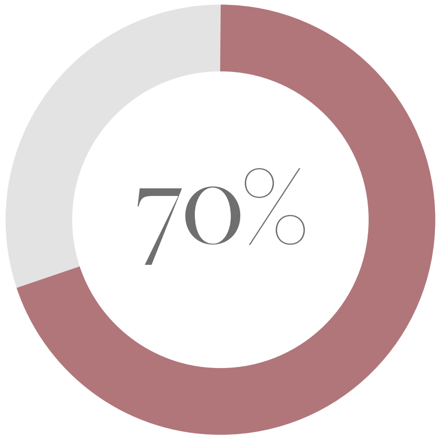




19 of 20 responding Nordic destination organisations identify product or experience availability as a barrier to effective season extension.



15 of 20 describe season extension as a clear and defined strategic priority.



14 of 20 say visitors seek calm, silence or low-stimulus experiences outside peak season to some extent or to a large extent.

Contents

01. Executive summary

> “We can market the destination, but if nothing is open when people arrive, it doesn’t work.”

SURVEY RESPONDENT, REGIONAL DANISH DESTINATION, ANONYMISED

Making a season work

Our survey of 20 Nordic destination organisations points to a clear shift: season extension is becoming a destination-development issue, not primarily a marketing one.

95% identify product or experience availability as a barrier to effective season extension.

The problem is concrete. A destination can look compelling in November and still offer too little to book, eat, see or do when visitors arrive. That is pushing season extension beyond campaigns and into opening periods, transport, bookability and coordination between businesses. Making another season attractive is not enough if the destination cannot support the trip.

70% see demand for calm, silence or low-stimulus experiences outside peak season.

But another season does not always need more product. Darkness, forests, empty landscapes and fewer people can become travel assets precisely because summer has ended. The opportunity may be to recognise what becomes more valuable in another season, then decide how much development it needs.

Other signals are less established. Climate is entering some travel decisions, but the survey does not establish a distinct Nordic coolcation market. Sustainability work is widespread, while communication is becoming more selective and evidence-led. Taken together, the findings suggest a shift from selling another season to making it work – commercially, practically and experientially.

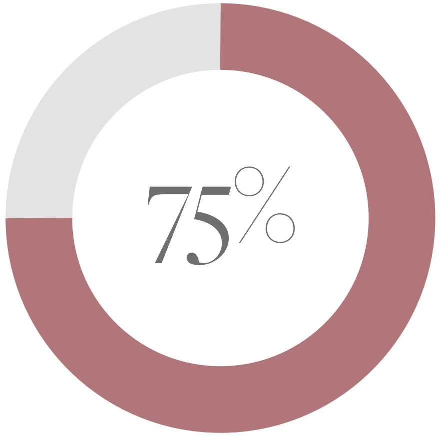
The next question is what kind of season is worth creating in the first place.

02. Season extension

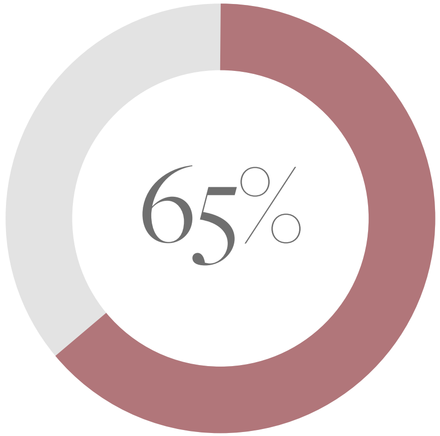
The Nordic season is being redrawn

“Our competitiveness depends on the quality of the overall visitor experience rather than the success of individual businesses.”

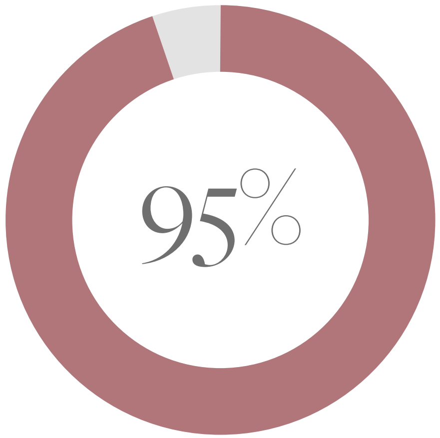
THOMAS JOHANSSON, PROJECT LEAD, WINTER DESTINATION NETWORK, OSLO



15 of 20 respondents describe season extension as a clear and defined strategic priority for their destination.



13 of 20 respondents primarily see season extension as a long-term structural goal for their destination.



19 of 20 respondents identify product or experience availability as a barrier to effective season extension.

It comes as no surprise that Nordic destinations want a longer season. More interesting is what that ambition now involves.

The survey describes work on opening periods, products, events, transport, distribution, partnerships and the visitor experience itself. Season extension is becoming part of how destinations are developed and managed.

The 95% figure is central to that shift. Almost every respondent identifies product or experience availability as a barrier. Demand alone cannot create a season if there is too little to eat, book, visit or do once a traveller arrives.

That puts much of the work beyond the campaign.

Bornholm – a different island for a familiar visitor

Bornholm is interesting because the seasonal shift is already visible in the numbers. Commercial overnight stays grew by 7.7% in 2025, but growth was stronger in October (+12%), November (+31%) and December (+50%) than in June or July, both at +4%. May and September also outperformed the core summer months.

For Bornholm, repeat visitors may be part of the answer. Helle Mogensen, Press and Communications Manager at Destination Bornholm, sees familiarity with the island as a potential route into other seasons:

> "When guests have visited Bornholm several times in summer, they often want to return at another time of year."

The island they return to is not simply summer Bornholm with fewer people. Mogensen points to raw nature, peace and quiet as qualities of autumn and winter. Familiarity with the destination can make visitors curious about another version of it.

This gives season extension another potential audience: people who have already been persuaded to come.

Bornholm is also adapting around that demand. Destination Bornholm brings tourism businesses together before winter to establish who intends to remain open and to strengthen cooperation between operators during the quieter months.

Season extension here reaches beyond attracting visitors. It affects how the destination organises itself around them.

Oslo – winter becomes destination management

Oslo starts from a different position. Skiing, ice skating, winter hiking and sauna culture already sit alongside restaurants, museums, architecture, shopping and nightlife. For residents, moving between city life and winter nature is ordinary.

The Winter Destination Network, led by VisitOSLO with partners across tourism, culture, transport and the public sector, was created to strengthen Oslo as an international winter destination. Thomas Johansson, project lead for the Winter Destination Network, describes the starting point:

“The opportunity was not to invent a new tourism product, but to make this local lifestyle more accessible and understandable for international visitors.”

That distinction is important. Oslo already had much of the raw material for a winter proposition. The destination work concerns how those separate parts become a coherent experience for someone without local knowledge. Johansson puts the organisational challenge plainly:

“No single organisation can deliver Oslo’s winter offering alone.”

Season extension therefore changes who needs to be involved. A DMO can create demand, but the experience depends on businesses, transport providers, cultural institutions, activity operators and public bodies delivering different parts of the same trip.

Season extension
What is changing?

01

Season extension is becoming destination development

Opening periods, products, partnerships, transport and the visitor experience sit alongside marketing in the responses.

02

Availability is the dominant barrier

Nineteen of 20 respondents identify product or experience availability as an obstacle. A longer season needs enough of the destination to function.

03

Existing visitors can become an off-season market

Bornholm shows how familiarity with a destination can create interest in experiencing it under different seasonal conditions.

04

Existing assets can support another season

Oslo’s winter proposition starts with behaviours, places and experiences that already form part of local life.

05

More organisations become part of the tourism proposition

Season extension depends on connections between actors that visitors experience as a single destination.

Season extension
How might we think about it?

Season extension is often framed as a demand problem: how do we persuade more people to travel in November?

The survey suggests an earlier question:

— *What would have to be true for November to function as a tourism season here?*

That might concern demand. It might concern opening hours, transport, bookability, products, information or coordination.

A destination can successfully create interest in another season before it has created a visitor experience capable of supporting that interest.

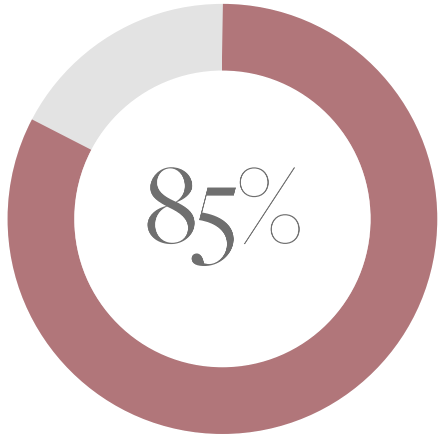
The survey's strongest finding is therefore not simply that Nordic destinations want longer seasons. It is that season extension is moving into the structure of destination development itself.

03. Coolcation

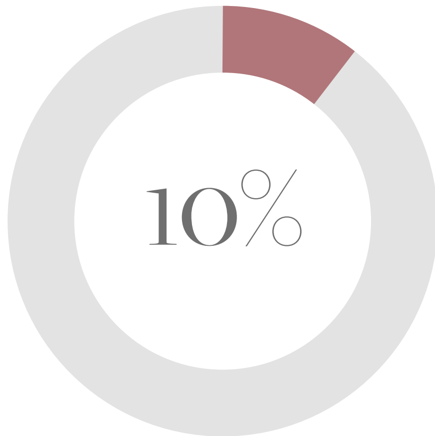
Climate is entering the travel decision, but the evidence is still uneven

“Thus far, it’s mostly been press inquiries that focus on hushpitality and coolcation.”

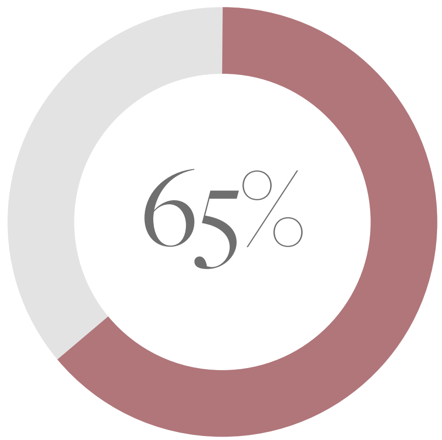
SURVEY RESPONDENT IN REGIONAL DANISH DESTINATION, ANONYMISED



17 of 20 respondents see at least some change in when visitors come or why they choose their destination – but the survey does not establish climate as the cause.



2 of 20 explicitly use climate, temperature or seasonality as part of their destination positioning.



13 of 20 use climate, temperature or seasonality indirectly in their positioning, without framing it as a specific travel trend.

The survey shows changing visitor patterns, but not one clear cause.

Seventeen of the 20 participating destinations have noticed at least some change in when or why visitors come. That includes stronger shoulder seasons, later bookings, event-led demand and shifts between international markets. It should not be read as evidence that climate is behind 85% of the change.

Climate does appear repeatedly in the open responses. Læsø sees Southern European visitors commenting on its summer temperatures. Oslo hears weather mentioned as part of the destination choice. In Vejle, the signal comes directly from conversations with visitors.

Vejle – climate becomes part of the decision

VisitVejle is hearing heat enter visitor conversations across several European markets. Tourism coordinator Sabina Bechmann Hejlesen says visitors from Germany, Belgium, the Netherlands and Britain have mentioned heat as a factor. A colleague has heard similar comments from visitors from Greece, Spain and Italy.

Most still come primarily for attractions such as LEGOLAND and LEGO House. For some, cooler weather forms part of the choice. For others, it is a bonus. Sabina Bechmann Hejlesen, Tourism Coordinator, Sustainability, Business Tourism and Projects at VisitVejle, says:

"I see it becoming part of the reason for visitors to look towards Denmark, but we haven't asked directly if they were considering Denmark already, or the heatwaves influenced their travel plans."

Her conversations also point to something more specific than temperature itself. Visitors want to remain active on holiday – to hike, explore and spend time outside as well as relax. Some, she says, have contrasted that with friends travelling further south.

"Some have mentioned that they have friends who have been in southern parts of Europe and have just been by the pool or indoor all day because it's too hot to explore."

The relevant proposition may therefore be what milder weather allows visitors to do, rather than cooler temperatures alone.

Læsø – temperature becomes a reason to go

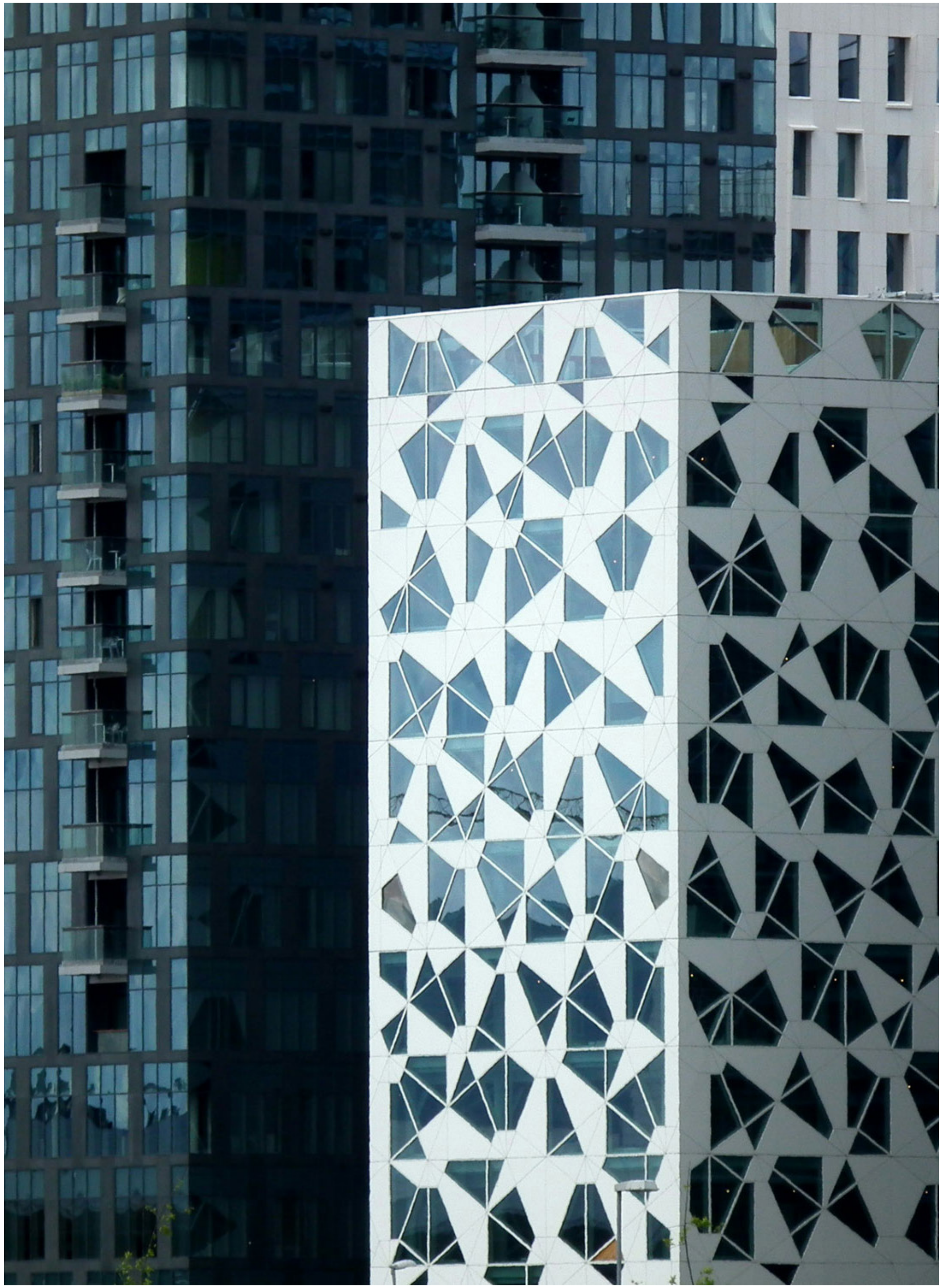
Tom Andersson, Marketing and Communication Consultant at Læsø Tourism and Business Association, says Læsø and North Jutland are receiving visitors from Italy, Spain, Portugal, France and Switzerland. VisitDenmark's national 2024 figures showed growth of 18% from Italy and 7% from France, although those figures cannot be attributed specifically to Læsø.

Læsø has recently gained access to more detailed ferry booking data, which may help the destination understand those markets better. There are other signals too. Journalists from Le Figaro, Le Monde, TV5 Monde and Italy's National Geographic have visited the island, and Andersson recalls a French couple arriving at the tourist office after reading about Læsø in Le Monde.

Summer 2026 strengthened his view of the climate connection:

"Yes, I just the other day wrote with the Italian Journalist from Rome – we had 30 degrees, and he had 39! It is also regarded as one of the reasons-to-go."

Andersson calls cooler temperatures "one of the reasons-to-go", not the sole reason. For Læsø, climate appears to be adding to an existing destination proposition rather than replacing it.



Oslo – seasonality becomes part of the city experience

VisitOSLO sees another form of climate-related demand. Thomas Johansson, project lead for the Winter Destination Network in Oslo, describes what the destination is seeing:

"Increasingly, we are seeing visitors choose Oslo because they are looking for a more active and seasonal city experience."

Johansson is careful about the role of weather:

"Weather is not the only reason visitors choose Oslo, but it has become an increasingly important component of the overall destination appeal."

In Oslo, seasonality changes what a city trip can include, from skiing and hiking to sauna, swimming, museums, restaurants and city life.

The counter-signal

Not every destination sees the same shift. One respondent from a Finnish destination reports no noticeable change in visitor timing or motivation. A respondent from a regional Danish destination said that coolcation had, at the time of the survey, generated more interest from journalists than from visitors.

More Southern European visitors do not automatically equal coolcation. Enjoying cooler weather after arrival does not prove that temperature drove the booking.

The survey points to an emerging climate signal with different expressions in different destinations, not one established Nordic coolcation pattern.

Coolcation
What is changing?

01
Climate can contribute to a decision without driving it

Vejle shows heat adding weight to a destination choice still led by established attractions

02
Weather can change what travellers are able to do

Milder conditions can preserve hiking, cycling, walking and exploring as part of the holiday.

03
Temperature is becoming part of destination value

Læsø hears visitors explicitly connect its summer climate with the reasons for travelling there.

04
Seasonality itself can be an attraction

Oslo sees interest in a city experience where weather, nature and distinct seasons remain visible parts of the trip.

05
The evidence is still uneven

Direct visitor feedback, changing source markets and press interest are useful signals, but they are not interchangeable proof.

Coolcation

How might we think about it?

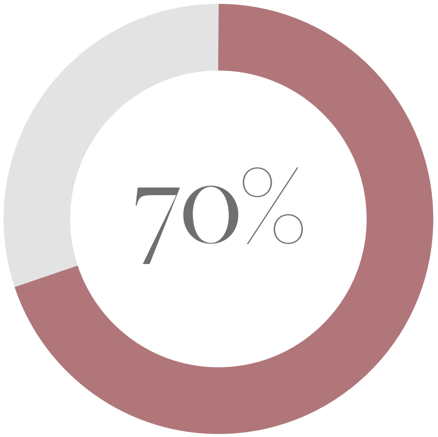
Before making coolcation part of a destination strategy, ask:

- *What are visitors saying without being prompted?*
- *Does the signal show up in bookings, stays, searches or source markets?*
- *Is climate driving the choice, influencing it or simply appreciated after arrival?*

For now, destinations have more to gain from measuring coolcation than from marketing it.

04. Quiet travel

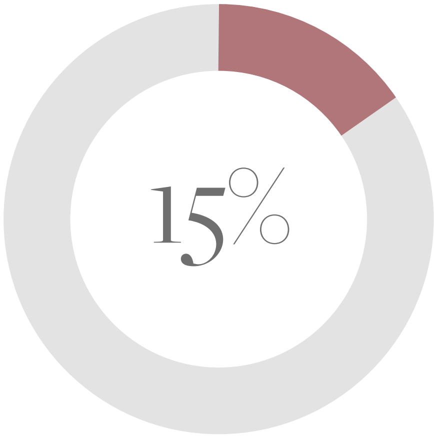
Calm, darkness and space are becoming strong travel assets



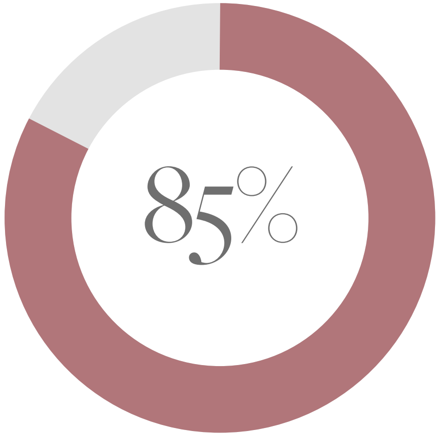
14 of 20 respondents see demand for calm, silence or low-stimulus experiences outside peak season to some or a large extent.

“A destination’s most everyday qualities can sometimes be what an international visitor values most.”

ELLEN KLOFSTEN, SOCIAL MEDIA MANAGER, VISIT SKÅNE



3 of 20 respondents see strong demand for calm, silence or low-stimulus experiences outside peak season.



17 of 20 respondents see at least limited demand for calm, silence or low-stimulus experiences outside peak season.

Quiet, darkness, forests, remote islands and low population density appear repeatedly in the responses. So do better sleep, empty landscapes and the absence of crowds or organised activity.

These are often qualities the destination already has. The challenge is recognising which ones visitors value and deciding how much intervention they need.

Skåne – giving quiet a language

Visit Skåne tested the idea directly with Stay Quiet. The initiative invited people to Skåne to stay in a remote forest cabin under one condition: they had to remain quiet during their stay.

Hundreds applied, from the UK to Mongolia. Ellen Klofsten, Social Media Manager at Visit Skåne, says the applications contained different personal stories but repeated the same themes: everyday stress, noisy cities, lives moving at high speed and limited access to quiet nature:

> "Many of the applications confirmed the premise of Stay Quiet itself: people feel stressed in everyday life and long for quiet, nature and a pause from a life moving at high speed."

Visit Skåne already had the forests, quiet landscapes and outdoor experiences. Stay Quiet gave those conditions a context that allowed visitors to recognise their value. The organisation now wants to explore how stillness and quietude can translate into packaged visitor experiences.

That raises the next question: how much should be added before the character of the experience starts to change?

Læsø – develop the experience, not the landscape

On Læsø, tranquillity is already part of the island's proposition. Tom Andersson, Marketing and Communication Consultant at Læsø Tourism and Business Association, describes the approach through what he calls its site-specific qualities: tranquillity, nature, the geological landscape of Denmark's youngest land and cultural heritage:

"Very little new is being built and a lot of initiatives are being made to support the visitors' experiences of these qualities – storytelling, digital information, hiking routes, nature guides and so on."

A trail can improve access, a guide can deepen understanding and digital information can help visitors find their way. None requires filling the landscape with more activity.

Åland – making the free things commercially viable

Visit Åland's Light in the Dark project developed off-season experiences around nature, local life and active adventure. Active Adventure performed best in marketing, with kayaking, island hopping and hiking packaged with guides, local meals and storytelling.

But there is a clear commercial problem. Noora Löfström, Managing Director at Visit Åland, describes the challenge:

> "It is hard for tourism businesses to see what you can commercialize and how to monetize it, as nature, the dark sky and quiet are basically free."

Guides, food, accommodation, transport and other services can create commercial value around those free assets. But Löfström also points to practical limits: quiet cannot always be guaranteed, winter weather is becoming less predictable and smaller off-season volumes can make experiences difficult to operate economically.

Visit Åland's work identified what it calls the Nature Tribe: visitors drawn to sea, forest, silence and local, genuine experiences, for whom the departure of the summer crowds can itself be part of the appeal.

The question is not simply whether quiet has value. It is how businesses can earn around it without undermining it.

Quiet travel
What is changing?

01
Quiet is becoming a stated reason to travel

Skåne received hundreds of applications centred on stress, noise and a desire for quiet. Åland has identified an audience drawn to sea, forest, silence and local experiences outside the main season.

02
Ordinary local qualities can be scarce elsewhere

Easy access to forest, space, quiet or darkness may barely register for residents while carrying real value for visitors.

03
Product development can start with interpretation

Naming an experience, mapping it, explaining a landscape or providing a route can make an existing quality easier to recognise and use.

04
Commercial value does not require building more

Åland exposes the economic question behind quiet travel while Læsø shows how access can improve with limited physical intervention.

05
Quiet can strengthen another season

Quiet, darkness, space and low density can become more pronounced when visitor numbers fall and the landscape changes.

Quiet travel
How might we think about it?

Before creating a new quiet-travel product, ask:

- *Which qualities do visitors value that we barely notice ourselves?*
- *Does the experience need a new product or clearer framing and access?*
- *What can businesses legitimately charge for around an asset that may itself be free?*
- *At what point would additional activity start to weaken what people came for?*

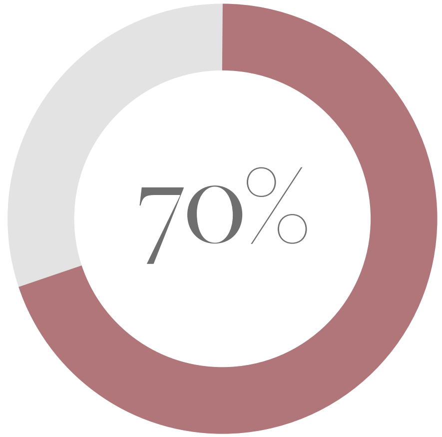
Quiet travel does not necessarily call for more product. In some destinations, the work starts with recognising an existing quality and helping visitors experience it without designing it away.

05. Sustainability

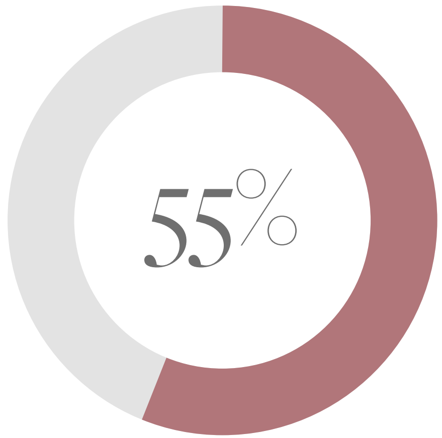
After the slogans, evidence matters more

"We do not attempt to use the term sustainability in our communication, nor similar terms. However, we seek to let this remain an unspoken underlying tone throughout all of our communication."

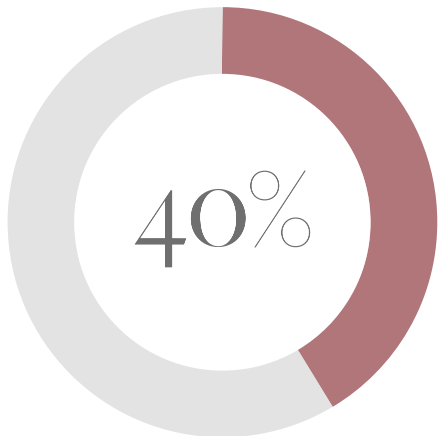
SURVEY RESPONDENT, DANISH DESTINATION ORGANISATION, ANONYMISED



14 of 20 respondents feel fairly or very confident communicating sustainability without overstating impact or intention.



11 of 20 respondents identify environmental impact as one of the hardest aspects of sustainability to communicate credibly.



8 of 20 respondents identify long-term change versus short-term actions as one of the hardest aspects of sustainability to communicate credibly.

Most respondents feel confident communicating sustainability, yet more than half identify environmental impact as one of the hardest aspects to communicate credibly.

The open responses help explain that tension. Sustainability appears throughout the practical work destinations describe: certification, transport, waste, product development, business support, accessibility, social impact and long-term planning. What varies is how much of that work becomes visitor-facing communication.

Some respondents are deliberately selective. One avoids the word sustainability altogether. Another argues that sustainability should largely be prioritised through local action rather than communicated to guests.

Confidence does not necessarily mean saying more.

Drawing the line at evidence

The limits become clearest when respondents are asked what is difficult to communicate credibly. One survey respondent identifies environmental impact, local economic effects and the distinction between long-term change and short-term actions before offering a simpler test:

> "Really anything where we do not have data to back up statements."

That shifts the question from what a destination wants to say to what it can demonstrate.

The survey contains plenty of activity behind that caution. Destinations describe certification, greener transport, business workshops, resource and waste management, social impact, visitor flows and annual sustainability targets.

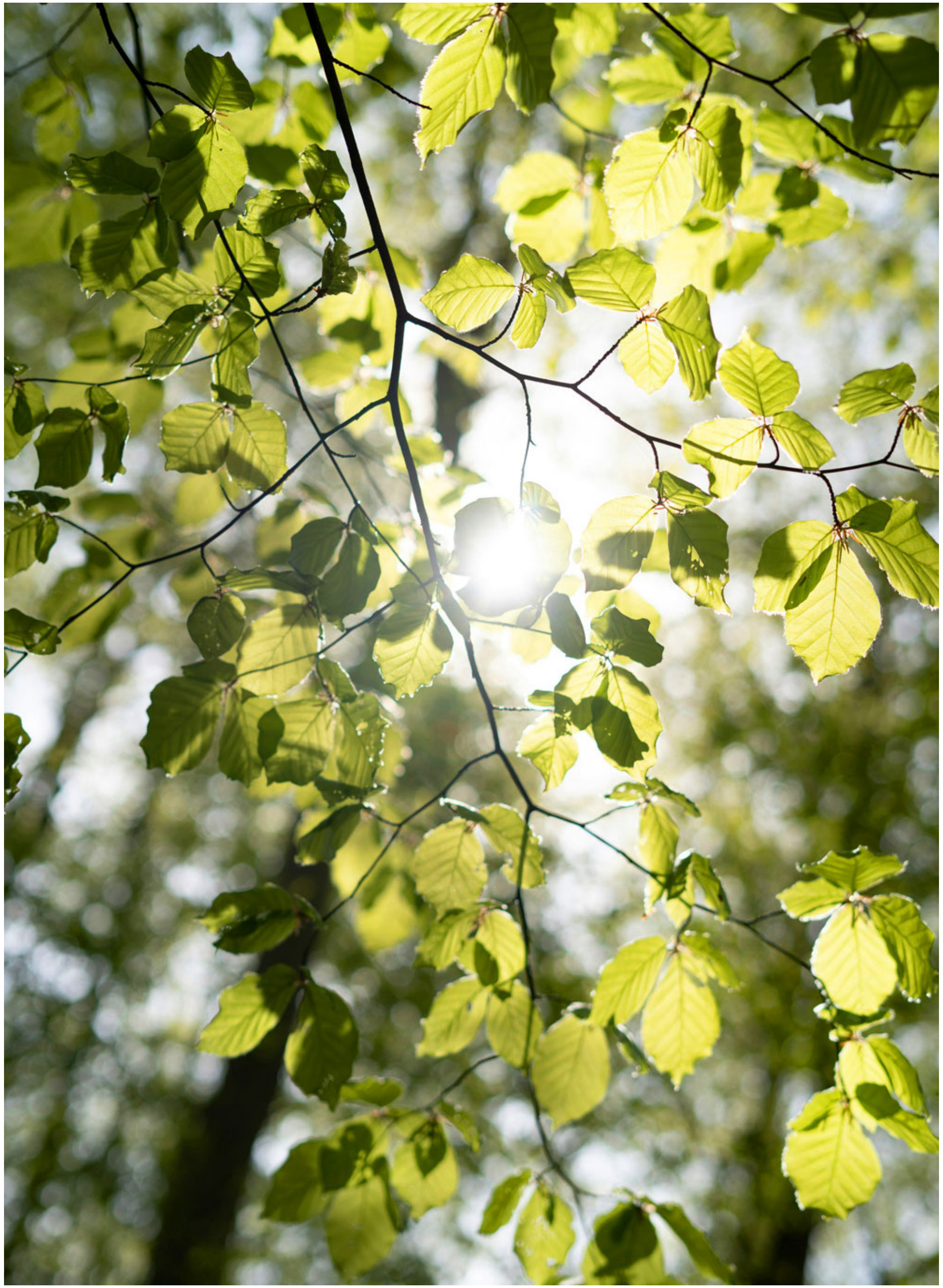
The work can be broad while the claims remain narrow.

Skåne – putting measurement into the strategy

Visit Skåne provides a current example of what that can look like in practice. Its Tourism Matters roadmap treats tourism as part of wider societal development and includes balanced visitor flows, responsible tourism and innovation among its strategies towards 2030.

In 2026, the organisation also published a climate action plan organised around five areas: measure, reduce emissions, regenerate, collaborate and finance. Among its stated actions are developing methods for measuring tourism's climate impact, producing an annual climate report, reducing its own footprint and encouraging lower-impact travel choices.

The first verb is significant: measure. Before stronger claims can be made, the organisation is building the means to establish what is happening.



Oslo – making the work visible through standards

VisitOSLO takes a more established approach. Sustainability has been one of its business strategy pillars since 2016, covering the economic, environmental and social effects of tourism.

It also points to something unusually tangible: around 95% of Oslo's hotels, venues and suppliers have third-party sustainability certification. The organisation highlights standards including ISO 14001 and Eco-Lighthouse, which cover areas such as waste, energy, purchasing and transport.

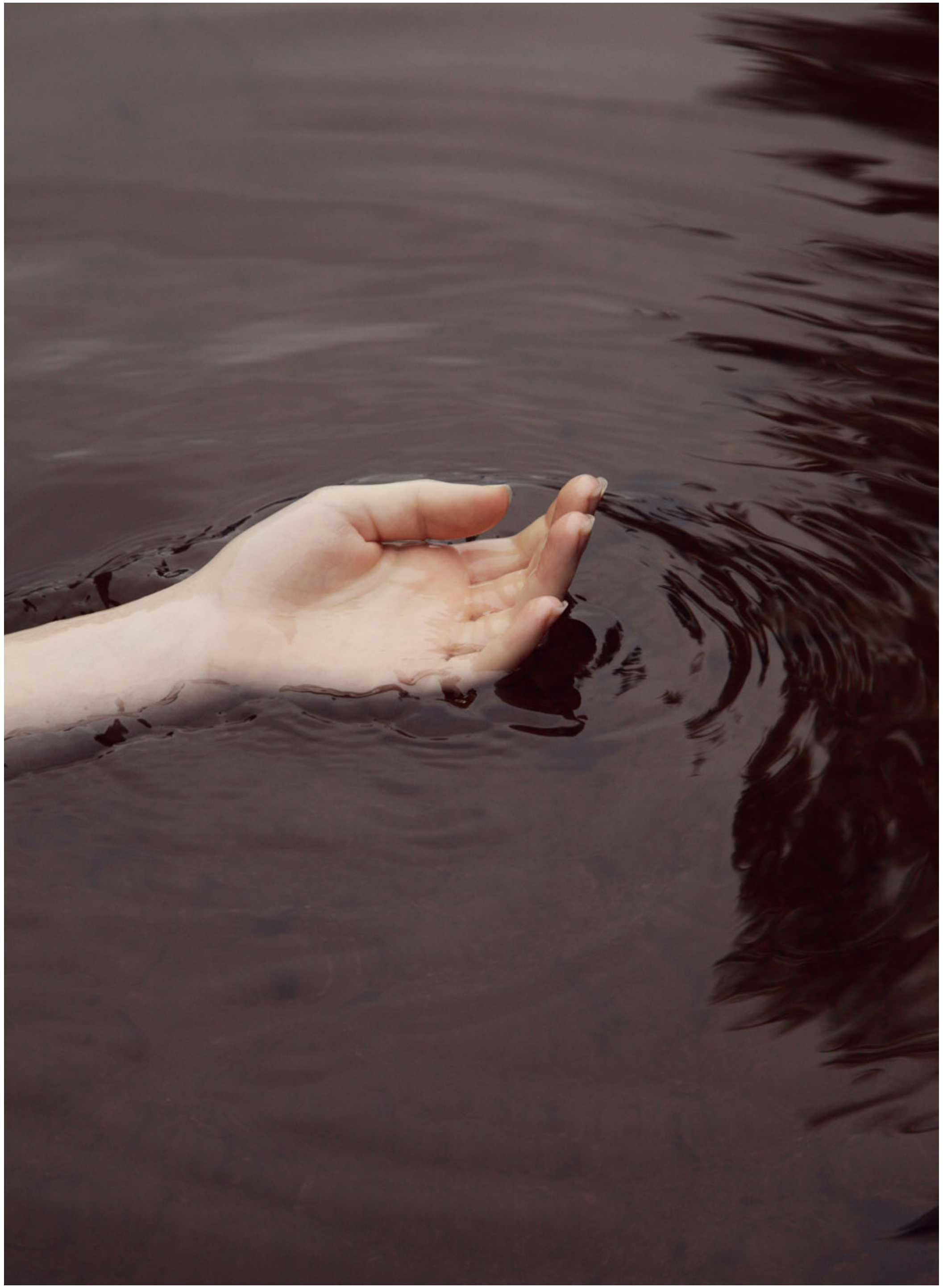
Here, certification provides a way of moving from a broad sustainability claim towards something independently defined and assessed.

Åland – building capacity through certification

Visit Åland offers another practical model. The organisation coordinates Green Key certification for tourism businesses on the islands. Participating accommodation providers, restaurants, conference venues and other businesses have to meet environmental requirements covering areas such as water and energy use, waste, cleaning, food and customer information.

That places part of the DMO's role upstream from visitor communication: helping businesses build practices that can later support credible information and claims.

Across the three examples, the tools differ – measurement in Skåne, widespread third-party certification in Oslo and industry capacity-building in Åland. The common ground is that credibility starts with the work behind the message.



Sustainability
What is changing?

01 Sustainability is moving into everyday destination management

The responses place sustainability across operations, product development, business support and long-term planning, rather than solely in communication.

02 Confidence can mean saying less

Most respondents feel confident communicating sustainability, but that confidence can include deciding when a claim should not be made.

03 Evidence is setting the boundary

Data and demonstrable results increasingly determine which sustainability claims destinations are prepared to make.

04 DMOs are building infrastructure for credibility

Measurement, certification and business support are creating systems through which sustainability ambitions can become verifiable practice.

05 The label itself is becoming optional

Some respondents distinguish between doing the work and communicating it as sustainability, including one that avoids the term altogether.

Sustainability

How might we think about it?

Before turning sustainability work into destination communication, ask:

- *Can we prove the claim?*
- *Are we describing a result, work in progress or an ambition?*
- *Does the visitor need this information?*
- *Would we still prioritise the action if we could not market it as sustainable?*

The survey does not show Nordic destinations backing away from sustainability. It shows substantial work happening behind the visitor-facing message and a more selective approach to what gets said.

Confidence may increasingly mean knowing which claims not to make.

06. What the survey tells us

Six findings for the next phase of Nordic tourism

The four themes in this survey began as separate questions: season extension, climate, quiet travel and sustainability.

Put together, they reveal a more complicated picture. A longer tourism season is not simply a matter of generating more demand. It raises questions about commercial risk, what a destination considers valuable, how quickly trends become strategy and how much development is actually desirable.

These are the findings we think deserve more attention.

Season extension has a first-mover problem

There is a circular problem behind the survey's 95% finding on product and experience availability. Businesses need visitors to justify staying open. Visitors need businesses to be open before they have a reason to come.

The risk is rarely shared equally. A DMO can promote November, but it does not usually decide whether a restaurant opens on Tuesday, an attraction extends its season or an activity runs with six bookings instead of sixty. Each operator makes a commercial decision based partly on what everyone else is doing.

Bornholm offers a small but telling example. Tourism businesses meet before winter to establish who intends to remain open, how they can refer visitors to one another and how opening information can be communicated. Elsewhere in the survey, future booking data is being used to show attractions that there may already be enough demand to justify opening.

This suggests a useful role for destination organisations: reduce the uncertainty of going first. Demand data, shared calendars, referrals, transport coordination and visibility of what is already booked can make individual decisions less speculative.

The question to ask:

— *What evidence would businesses need to commit to another season?*

Value changes with the season

Tourism tends to describe the off-season by subtraction: less daylight, fewer visitors, fewer events, colder weather and more businesses closed. Several findings in this study make more sense when the equation is reversed.

Fewer visitors can mean more quiet. Darkness can become an experience rather than an inconvenience. Cooler weather can make hiking or exploring easier. A city with snow offers experiences that do not exist there in July. A familiar island can give returning visitors a reason to come back precisely because it feels different.

Seasonality does not only change demand. It can change the value of a destination's assets.

The instinctive response to a quieter season can be to fill it with more events, activities and reasons to come. Sometimes that will be necessary. But if November is treated simply as a quieter July, destinations risk overlooking what November has that July does not.

Instead of mapping only what a place has, it may be useful to map when each asset has its greatest value. A beach, forest, sauna, restaurant, dark sky, cultural institution or hiking trail does not offer the same proposition twelve months a year.

The question to ask:

— *What becomes more valuable here when the season changes?*

Not all value is sellable

Seventy per cent of respondents see demand for calm, silence or low-stimulus experiences outside peak season. Yet many of the qualities associated with that demand are free.

Åland puts the problem plainly: nature, darkness and quiet may have value to visitors, but tourism businesses still need something they can sell. A person enjoying an empty forest is not automatically an off-season economy.

The commercial opportunity often sits around the asset. Accommodation, food, guides, equipment, transport, routes, storytelling and access can turn a free quality into a trip that supports businesses.

But there is a limit. Add too much infrastructure to quiet and it may stop being quiet. Turn every empty landscape into an organised experience and some of its value disappears.

The product-development question is therefore not simply how to commercialise an asset, but how to create economic value around it without diminishing what made it valuable.

The question to ask:

— *What can businesses earn from around an asset without weakening the asset itself?*

Language can move faster than behaviour

Coolcation provides the clearest warning in the study. The signal is real enough to investigate. Visitors in Vejle and Læsø are talking about heat and cooler conditions, while Oslo sees weather becoming a more important part of its seasonal appeal.

But the evidence does not establish one Nordic coolcation market. One respondent reports that interest in coolcation and hushpitality has so far come primarily from the press.

Tourism can acquire new terminology faster than travellers acquire new habits. A phrase can move quickly through media, trend reports and industry conferences. Search interest can follow. None necessarily means that a commercially useful visitor segment has formed.

Terminology | Signal | Behaviour | Viable market

They are not the same thing. A new term can help a destination notice emerging behaviour. It should not substitute for evidence of it. Who is travelling? From where? When? What are they booking? Why did they choose the destination? Is the pattern growing and does it persist?

The question to ask:

What evidence would show that an emerging signal has become actual visitor behaviour?

Restraint is becoming a destination skill

Quiet travel, coolcation and sustainability appear to concern very different things. Read together, however, they share a question about restraint: when should a destination not add something?

A quiet landscape can lose its appeal through excessive development. A climate signal can become a weak proposition if marketing runs ahead of behaviour. A sustainability claim can lose credibility when communication runs ahead of evidence.

The opposite risk also exists. Doing nothing does not make an experience accessible, commercially viable or visible to potential visitors. The judgement lies between the two.

What needs developing? What needs connecting, explaining or measuring? And what should be left alone?

Development does not always mean adding. Sometimes it means coordinating what exists, giving an overlooked quality a language, gathering better evidence before deciding or protecting what makes the destination worth travelling for.

The question to ask:

– *What needs intervention here – and what is more valuable left alone?*

Success needs defining

What does a successful longer season actually look like?

It does not necessarily mean twelve equally busy months or maximising visitor numbers. Another viable month might support businesses that would otherwise close, create more stable employment, make better use of existing capacity or shift demand away from peak periods.

Season extension is not one objective. Its economic, social or destination value needs to be defined locally.

A tourism season is not simply a period when people can visit. It needs a reason to travel, sufficient demand and enough of the destination working around that demand to make the trip function.

The question to ask:

— *What would a successful additional season actually achieve here?*

The opportunity is not to make every month busier. It is to understand which other versions of the destination are worth making possible.

07. About the survey

The Nordic Destination Survey™ 2026 is an independent study by The Nordic Nomad and The Nordic Destination Lab, examining how destination organisations across the Nordic region are approaching season extension, changing traveller behaviour and destination development.

20 DESTINATION ORGANISATIONS

4 NORDIC COUNTRIES REPRESENTED

SWEDEN 8 · DENMARK 8 · NORWAY 2 · FINLAND/ÅLAND 2

Survey responses collected January 2026, with follow-up interviews conducted later in 2026.

The original survey combined quantitative multiple-choice questions with open responses, allowing participants to describe what they are seeing in their own destinations and how they are responding.

The participating organisations represent a mix of national, regional, city, municipal and other destination organisations. Participation was voluntary and respondents were self-selected.

The results therefore describe the experiences and views of the 20 participating organisations. They should not be interpreted as statistically representative of all Nordic destination organisations or Nordic tourism as a whole.

Percentages throughout the study refer to the 20 respondents unless otherwise stated. Where respondents could select more than one answer, percentages are reported independently and may therefore total more than 100%.

FOLLOW-UP INTERVIEWS

Selected respondents were invited to answer additional questions where their original responses raised issues that warranted further exploration.

Follow-up interviews were conducted later in 2026 and used to add context, test interpretations and understand the mechanisms behind individual survey findings. They should not be interpreted as additional survey responses. Named quotations from follow-up interviews are published with the respondent's permission.

ANONYMITY AND ATTRIBUTION

Individual survey responses are used anonymously unless explicit permission for attribution has been obtained.

Where a destination is named as an example without attribution to its survey response, the information has been independently verified through publicly available sources.

Anonymous quotations may be lightly edited for spelling or grammar where necessary, without changing their meaning. Quotations originally provided in another Nordic language may be translated into English, with the meaning retained and approval sought from the respondent where required.

HOW TO READ THE FINDINGS

The survey captures what destination organisations report seeing and doing. It does not independently establish causation.

A reported change in visitor behaviour, for example, does not by itself demonstrate that climate, a campaign or another single factor caused that change. Where evidence is still emerging, the study distinguishes between observed behaviour, visitor feedback, destination interpretation and wider hypotheses.

The purpose of the survey is not to establish a single Nordic tourism model. It is to identify shared challenges, emerging signals and practical approaches that other destinations can examine against their own data and circumstances.

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SHARING AND REFERENCING

All photography in this study is sourced from Unsplash.

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