

Travel Barometer

–

Spring 2023

Survey conducted in the UK,
Germany,
Sweden, Denmark, the
Netherlands
and France
in March 2023



Introduction

Background

Innovation Norway's Travel Barometer is used to measure travel expectations, travel plans and the general desire to travel in the main European markets. The barometer takes the temperature of these markets and shows how tourists from Sweden, Denmark, Germany, the Netherlands, the UK and France are adapting and prioritising at a time of significant uncertainty and challenge.

In most markets, the desire to travel has recovered to pre-pandemic levels, even though inflation, war, climate change and the pandemic are influencing the travel plans of a large proportion of tourists.

This report contains the main findings from the survey conducted across the markets. The survey was conducted between 10-21 March. The report was produced by Gyger and Epinion in collaboration with Innovation Norway.

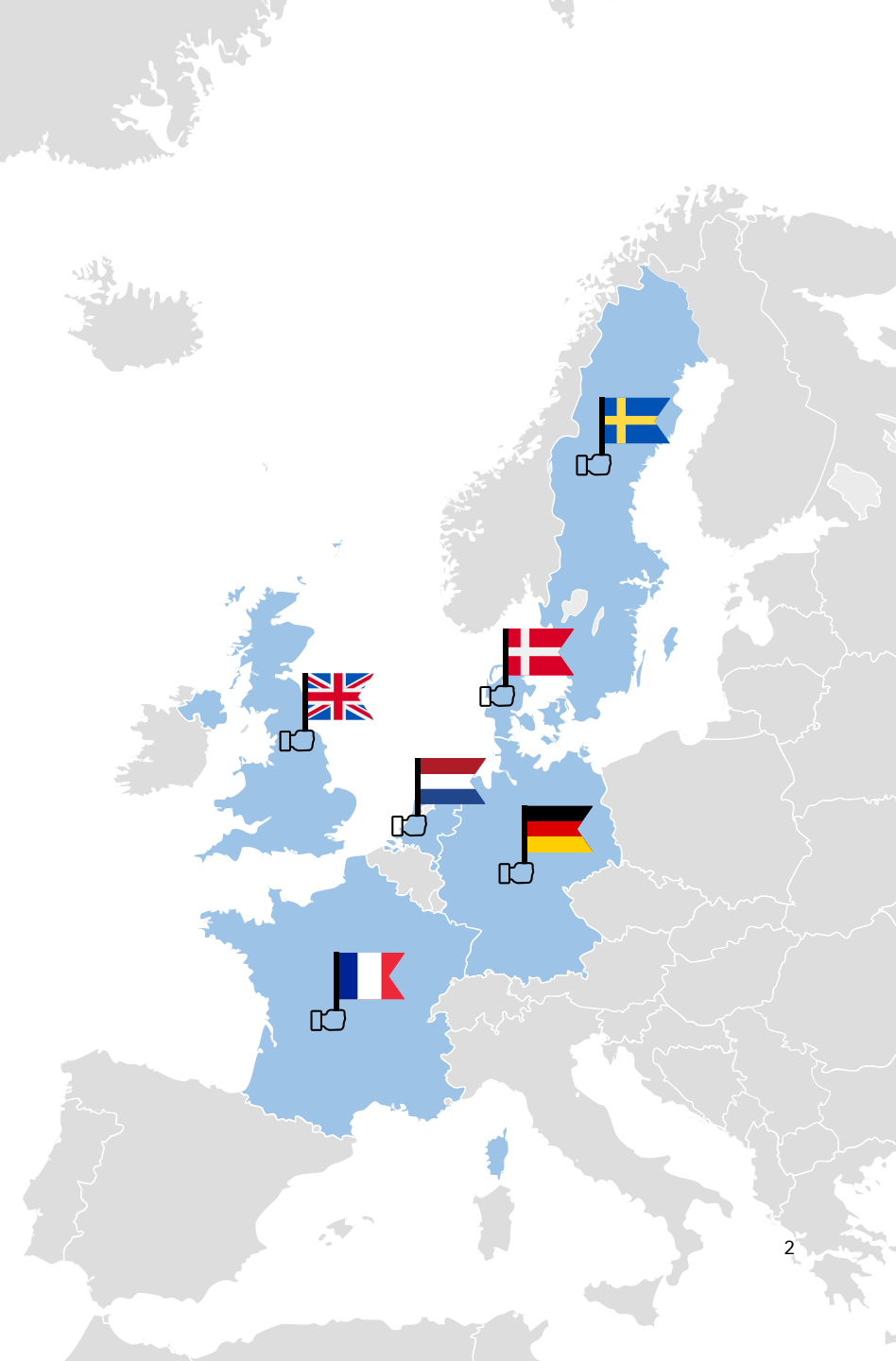
Data and reader guide

The analysis is based on interviews with 6,116 potential tourists*. Around 1,000 interviews were conducted with potential tourists in each market. Germany (1,052), France (1,004), the UK (1,016), the Netherlands (1,003), Sweden (1,037) and Denmark (1,020).

The main results are presented in the first part of the report. The second half presents an overview of what characterises those who are considering or planning to visit Norway in the next 12 months or 3 years.

* Target group surveyed:

The survey is based on interviews with potential tourists. These are defined as people who have been on at least one holiday and/or travelled abroad for leisure purposes in the past 3 years and who are interested in holidaying abroad in the next 3 years. The interviews were limited to a few specific geographic areas in some countries (see page 7 for more details).



Summary of findings



Travel expectations are back to pre-pandemic levels. Many more want to travel abroad in the next 12 months. The proportion has increased from 49% before the summer season 2022 to **59%** now. This is the highest level of intention to travel measured in all countries, with the exception of Germany, since the outbreak of the pandemic.



8 out of 10 tourists responded that their travel plans have been influenced by price rises, unpredictability, war, Covid and the climate crisis. **Price rises** for travel and a demanding economic situation means that many are looking for cheaper travel and for opportunities to save money on holiday.



Interest in Norway is at **record high** levels. Some 6% of the population in the surveyed markets are considering visiting Norway in the next 12 months. Interest in visiting Norway has increased in all of the countries. **Nature experiences** are a must for a large majority and the interest in experiencing fjords, mountains, the Northern Lights and cruises is higher among those considering Norway in advance of this year's summer season than it was last year. The interest in city and cultural experiences is somewhat lower.



The majority of tourists want to act responsibly with respect to nature, the environment and the climate when travelling. Those considering visiting Norway in the next 12 months are more interested in sustainability than other tourists. They are more likely to choose **climate-friendly transport and destinations** that take sustainability seriously.

The majority are adapting their travel plans based on inflation and uncertainty, but expect to travel more than ever



Less attention is being paid to the pandemic, although it is still influencing travel plans

What are we seeing?

The pandemic is still influencing the travel choices of around 50% of tourists. Especially in Germany and Denmark.



How is this affecting tourists?

Danes, Brits and those under 35 were more likely to respond that the possibility of a resurgence of the pandemic is influencing their travel choices.



Price rises and a demanding economy mean that many are looking for cheaper holiday alternatives

What are we seeing?

Rises in travel prices are affecting more than 60% of tourists.



How is this affecting tourists?

Many are adapting their plans by choosing cheaper destinations and travel and/or spending less money on trips.



Women and young people are most affected

What are we seeing?

Women are adapting their travel plans to a much greater extent than men



How is this affecting tourists?

Women are more affected than men by tighter personal finances, price rises, war and the climate crisis. They are adapting their travel choices to a far greater extent.



The uncertain situation is affecting markets in different ways

What are we seeing?

Norway is more attractive in all markets, especially in Sweden, Denmark and the UK



How is this affecting tourists?

The Danes and Swedes considering Norway in the coming year are more worried about how the war will develop and are also more likely to holiday in their home country.

Main findings

Main findings per market

UK

The desire to travel has risen sharply, from 62% (April 2022) to 70% now. Norway has jumped up the list of countries Brits want to visit. Norway has leaped from 18th to 9th place (April 2022 to March 2023). Brits who are considering Norway stand out in that they are more influenced by the climate, war, pandemic and a demanding economic situation. They are more interested in both nature and cultural experiences and would love to experience the Northern Lights and a cruise.

No one has travelled abroad more in the past 3 months than the Dutch, and no one is more eager to travel in the coming years. The Dutch who are considering Norway are interested in many other destinations. Nature experiences and peace and quiet distinguish a holiday in Norway from a holiday elsewhere. They are less interested in hiking, fishing and cycling on trips to Norway than in other countries. Those considering Norway are in particular young men with an average to high income.



Germany

In Germany, the desire to travel has not returned to 2019 levels. The proportion who want to travel abroad has been between 58% to 62% of the population since autumn 2020. Norway is popular and back in the top 10 (of the countries included in the survey). No one is more interested in nature experiences, the Germans want to experience the fjords and Northern Lights, and a variety of activities. They like to choose destinations that take sustainability seriously and climate-friendly transport.

Denmark

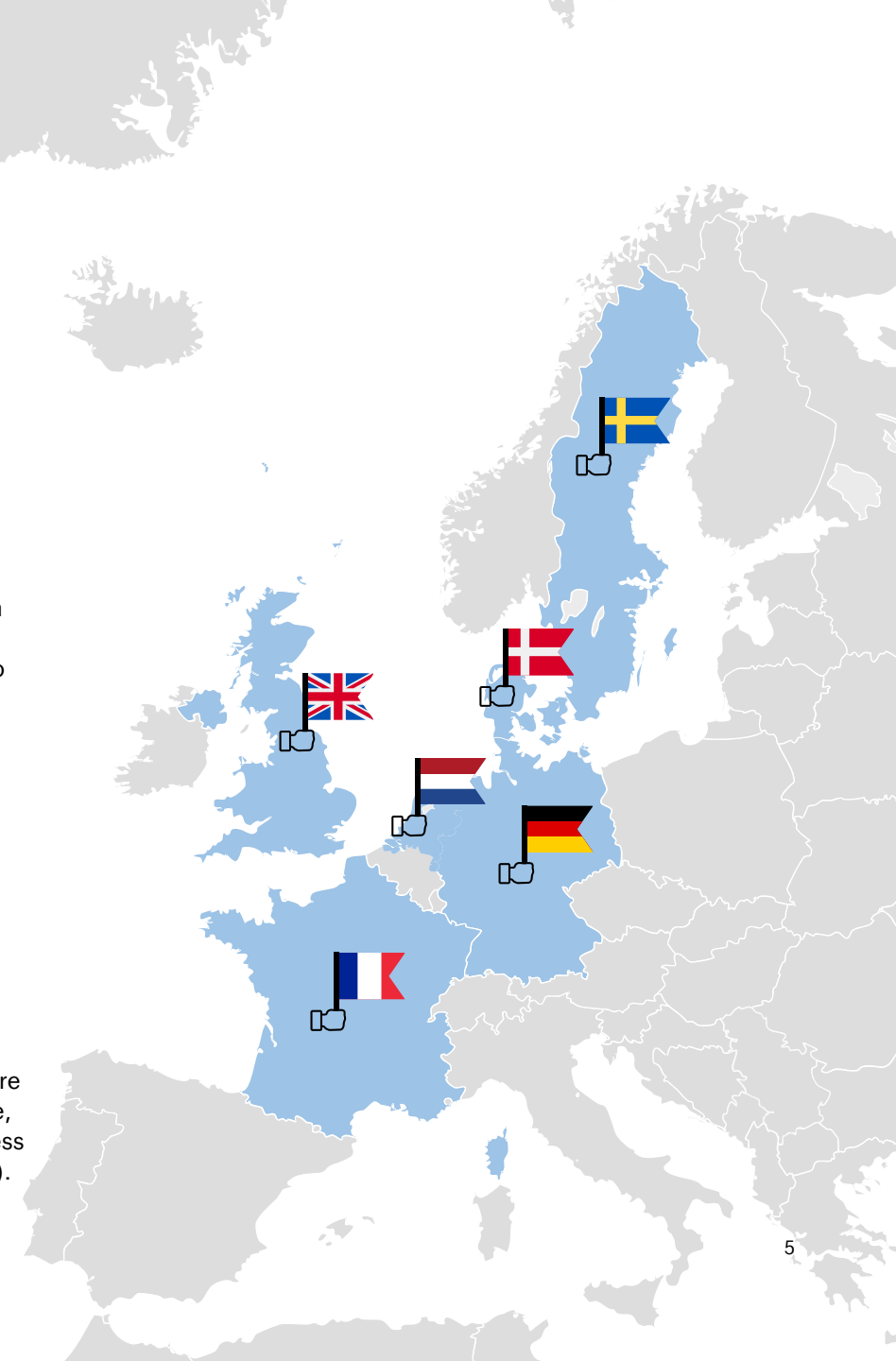
Enthusiasm for travel is increasing in Denmark and is 5% higher than in 2019. Some 7% of the population is considering visiting Norway in the next 12 months. The Danes considering Norway have travelled a lot and are more influenced by the risk of cancellations and chaos at airports. They are young, with good personal finances, but generally choose cheaper trips. Winter holidays score strongly, although 60% are considering a summer holiday with quality time, nature experiences and peace and quiet.

France

In France, the desire to travel is higher than in 2019. Norway is most popular among young men with high incomes. The Northern Lights are by far the main experience for Frenchmen; more than half would like to visit Norway in the winter. Nature activities in winter are more attractive than nature activities in summer. Frenchmen are keen to experience culture and history on a trip to Norway.

Sweden

A record number of Swedes (8%) are considering visiting Norway in the coming year. These people travel a lot, are more likely to visit destinations in Northern Europe and are more likely to be older men with a high income. They want to experience nature, culture and history. They are more interested in acting responsibly with respect to nature and the environment, and, for example, want to adapt by flying and travelling less (NB: they travel more than the average).

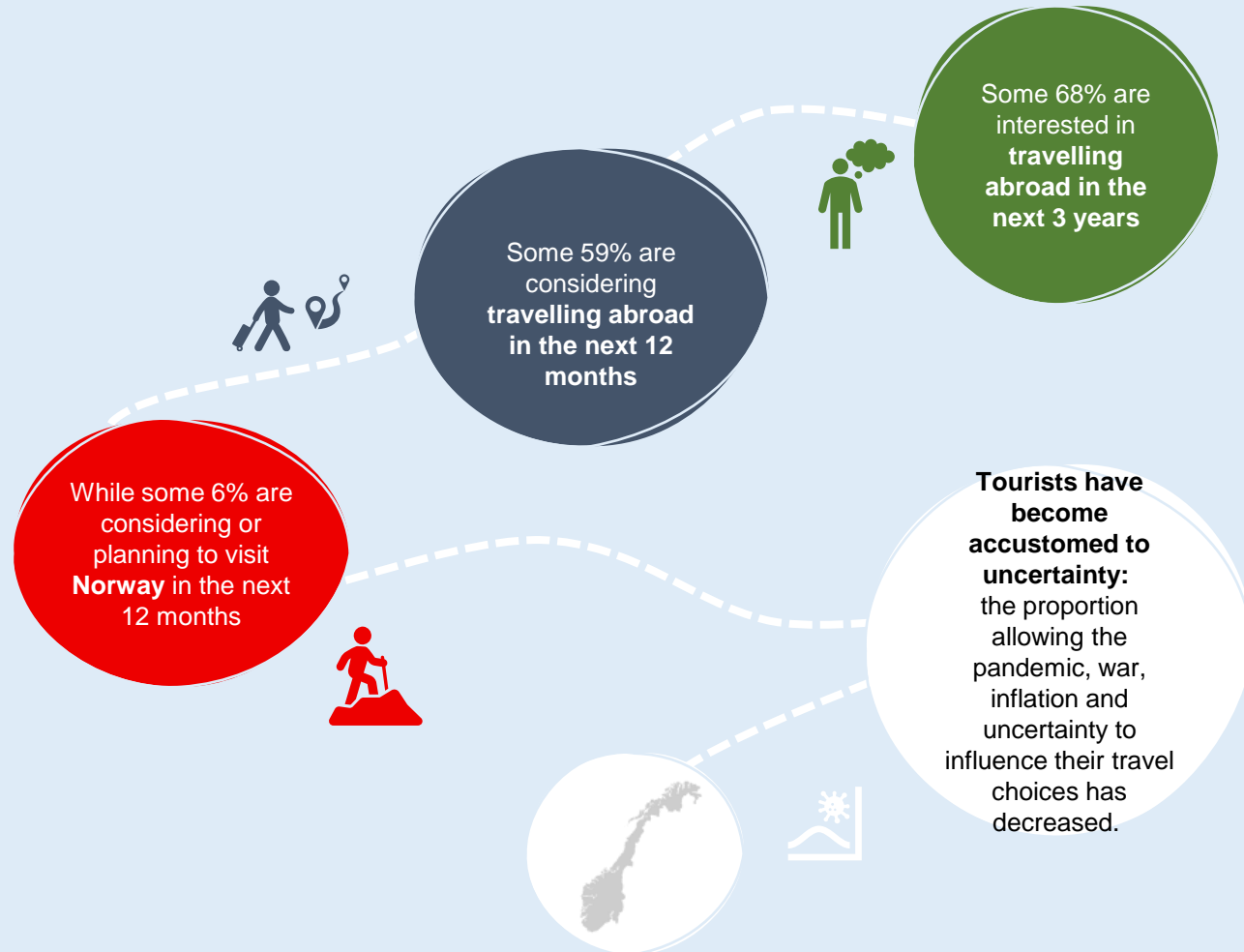


Future travel expectations

How many people are expecting to holiday abroad in the next 12 months? How many are considering visiting Norway? Will they book a package holiday in Norway?



Travel expectations are high despite unrest and uncertainty



The proportion of people interested in travelling abroad in the next 3 years has increased in all markets, with the exception of France. All markets, with the exception of Germany, are back to pre-pandemic levels.

The proportion considering travelling abroad in the next 12 months is 10 percentage points higher than it was in autumn.

The most enthusiastic about travelling are those with a high income and young people under 35. The proportion who have been on 3 or more trips abroad in the past 3 years has increased from 47% in autumn to 52% in this survey. The youngest travel the most, although the strongest growth has been in the 56+ age group. Some 65% of the group with the highest income has been abroad 3 or more times in the past 3 years.

The interest in visiting Norway is very high in this survey.

The desire to travel in general and to Norway in particular

The report looks at various target groups: note the icons and colours, they are used throughout the report

- The survey was conducted among the **target group** that has been on holiday abroad in the past 3 years and that is interested in travelling abroad on a holiday or leisure trip in the next 3 years (marked in green on the right). The target group has increased and is now at pre-pandemic levels in all markets with the exception of Germany.
- The report particularly focuses on that segment of the target group that is planning to travel abroad in the next 12 months (marked in blue on the right)
- The report particularly focuses on those considering or planning to visit Norway in the next 12 months and the next 3 years (marked in red).

Areas in which interviews were conducted:

Sweden, Denmark and the Netherlands: Covered nationally.

UK: Bedfordshire and Hertfordshire, Berkshire, Buckinghamshire and Oxfordshire, Essex, Inner London, Outer London, Kent, Surrey, East and West Sussex (the area around London).

France: Ile de France and Rhone-Alpes (the areas around Paris and Lyon).

Germany: Baden-Württemberg, Bayern, Berlin, Hamburg, Hessen, Niedersachsen, Nordrhein-Westfalen, Rheinland-Pfalz, Schleswig-Holstein and Mecklenburg-Vorpommern

Overview of the various target groups in the survey



Entire population



Those interested in travelling abroad in the next 3 years (target group for the survey)



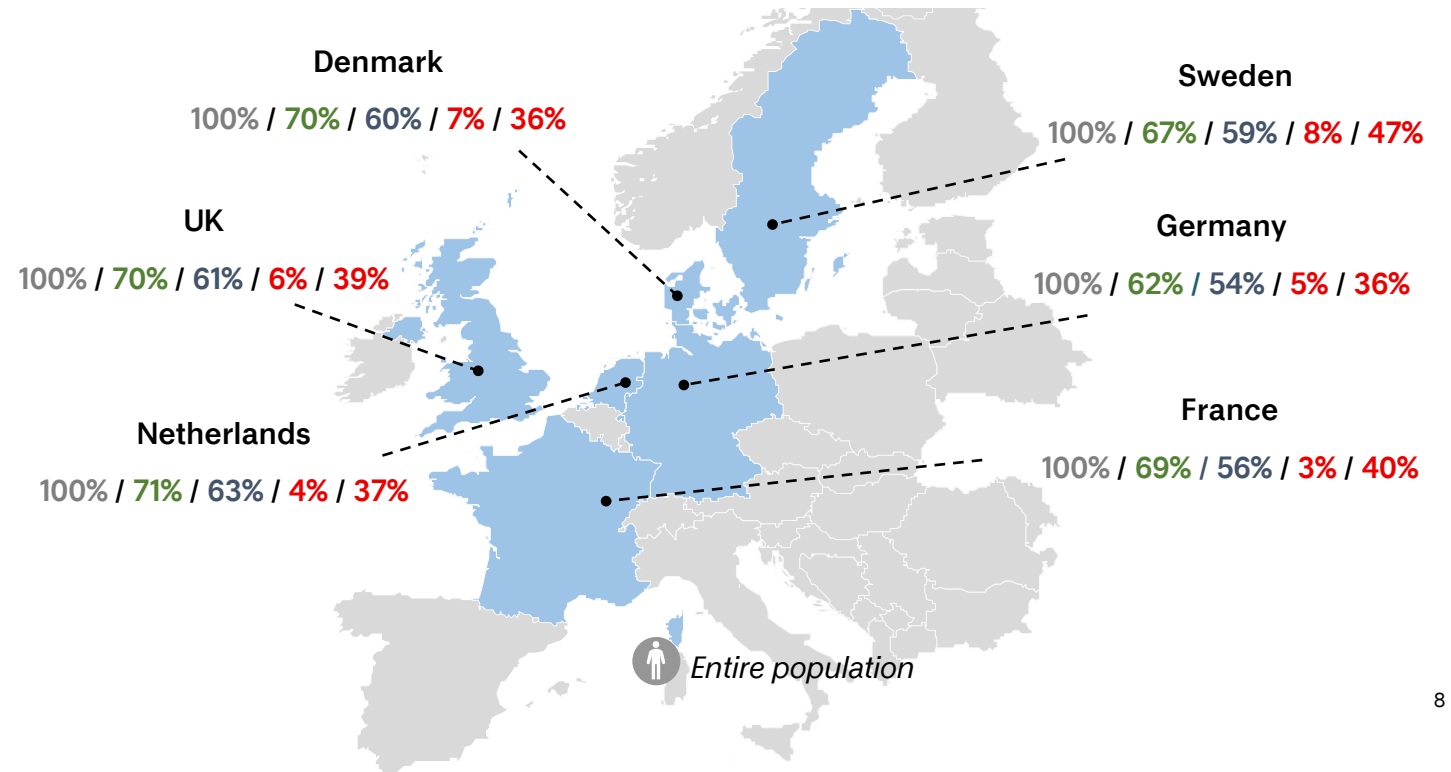
Those considering or planning to travel abroad in the next 12 months



Those considering or planning to visit Norway in the next 12 months



Those who would like to holiday in Norway in the next 3 years



Proportion of potential tourists before and after the Covid

Travel expectations are back to pre-pandemic levels

The proportion who want to travel abroad is back to pre-pandemic levels in all countries, except for Germany (see next page).

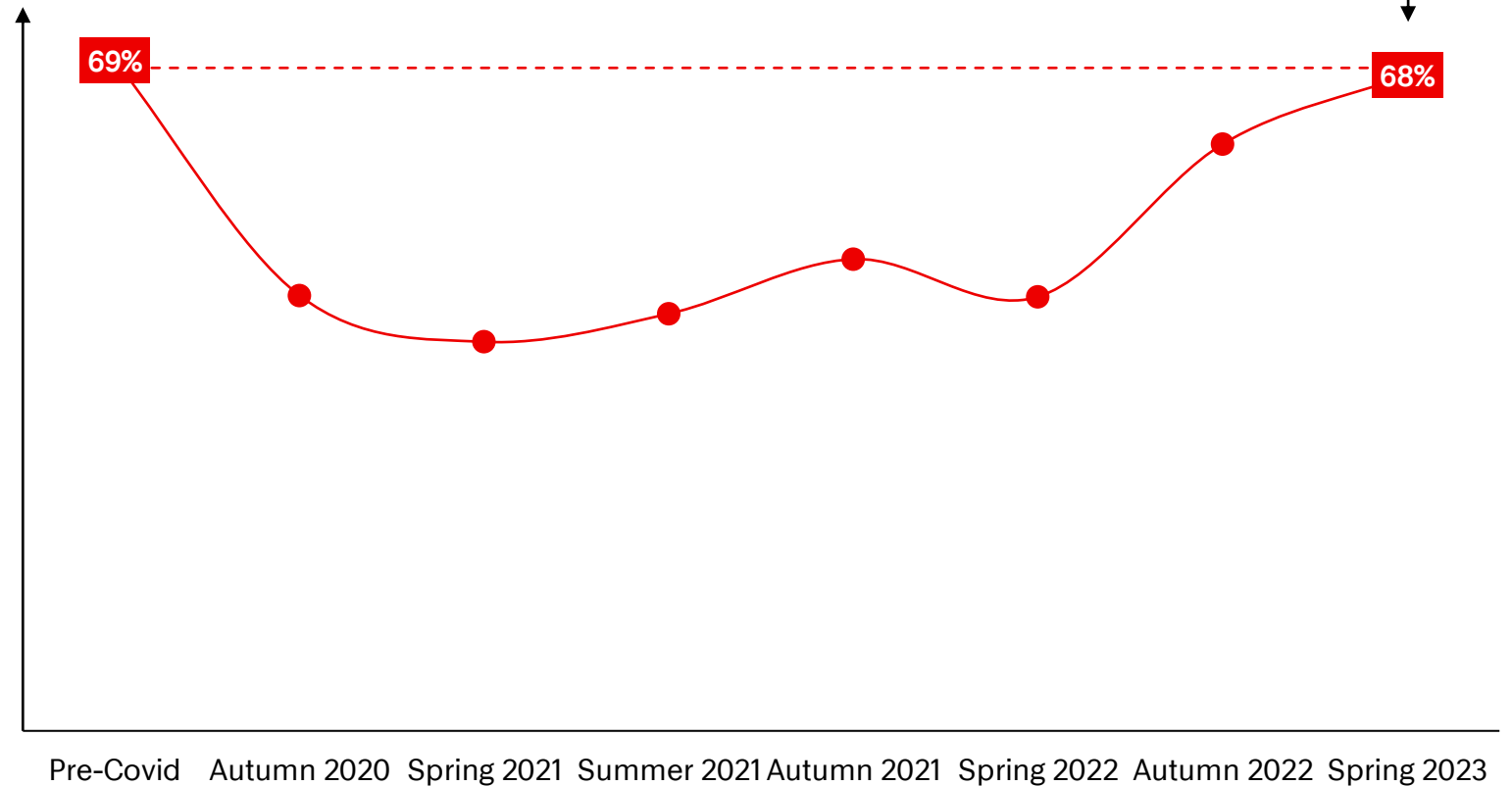
Definitions of potential tourists before and after the Covid.

Prior to the outbreak of the Covid pandemic, previous travel behaviour was the best indicator of future travel behaviour.

Pre-Covid potential tourists: People who have been on holiday or travelled abroad for leisure purposes in the past 3 years.

Post-Covid potential tourists: People who have been on holiday or travelled abroad for leisure purposes in the past 3 years and who are interested in holidaying abroad in the next 3 years.

Proportion of potential tourists

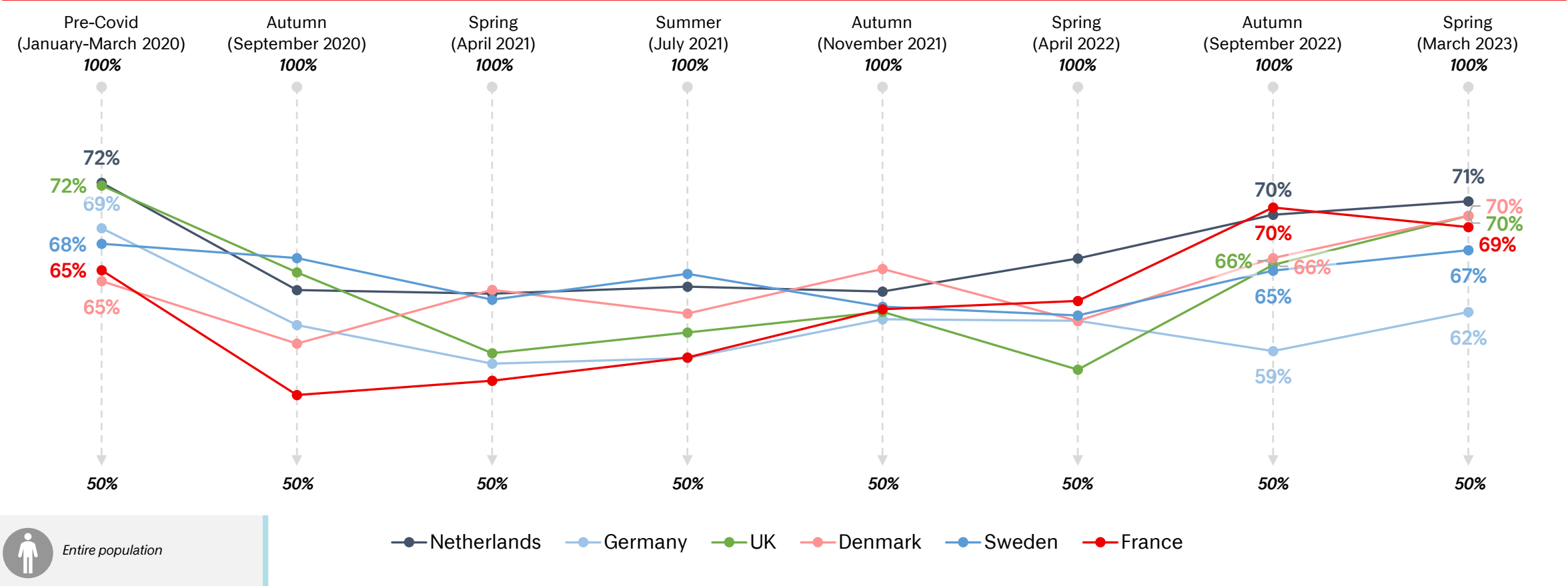


Entire population

Proportion of potential tourists before and after Covid

Most markets are back to 2019 levels

Development in the proportion of potential tourists – those interested in travelling abroad in the next 3 years



Destinations in the next 12 months

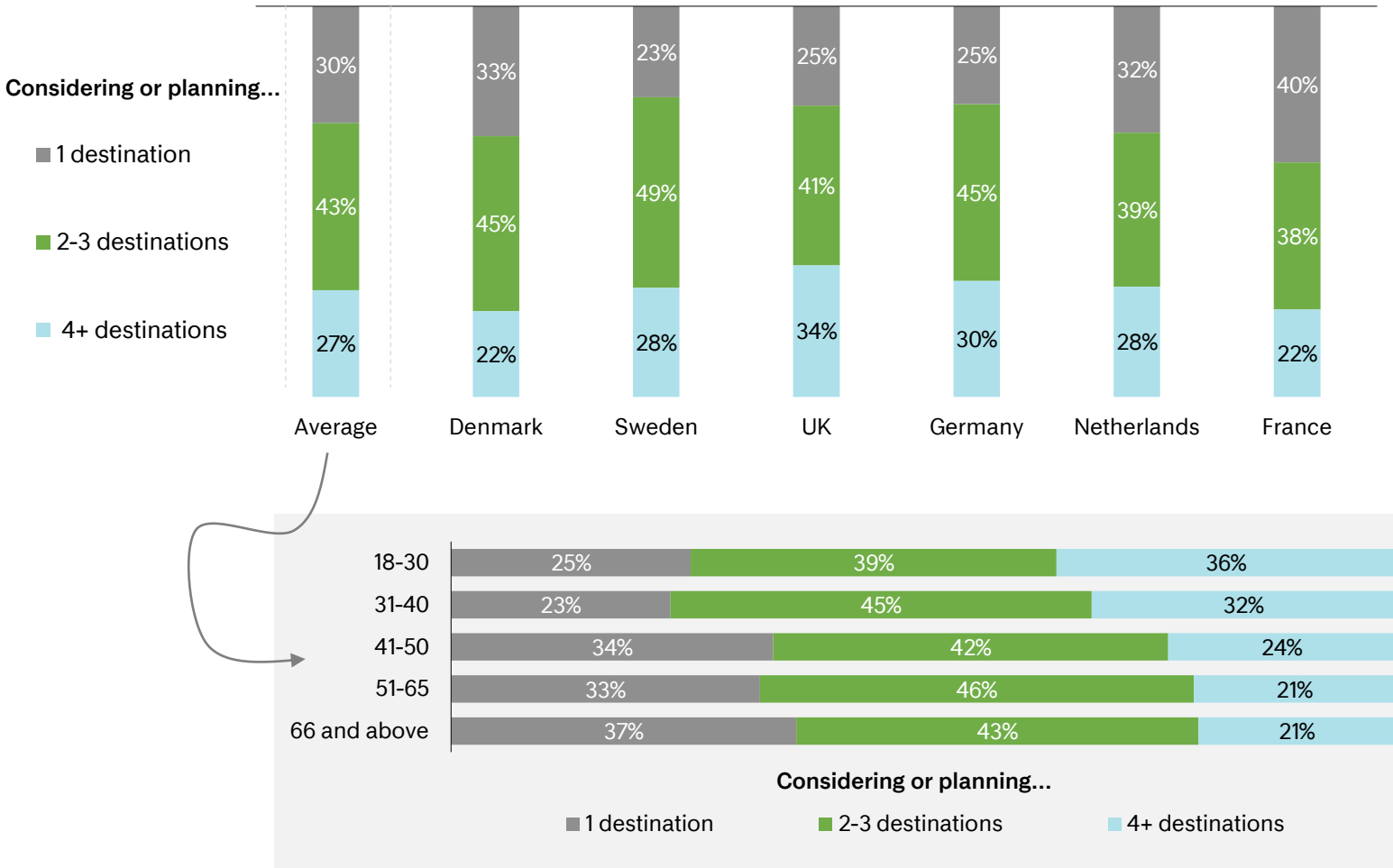
2 out of 3 are considering several destinations

Tourists from all countries, with the exception of France, are considering more destinations now than in the autumn survey. The proportion considering 4 or more destinations has increased from 22% to 27%.

The youngest are more likely to consider overseas destinations, while older tourists are more likely to prefer closer destinations.

 This page looks at people who are *interested in travelling abroad in the next 12 months*

Which countries are you considering or planning to visit on a holiday/leisure trip in the next 12 months? The percentages indicate the proportion of those interested in travelling abroad in the next 12 months



Destinations in the next 12 months

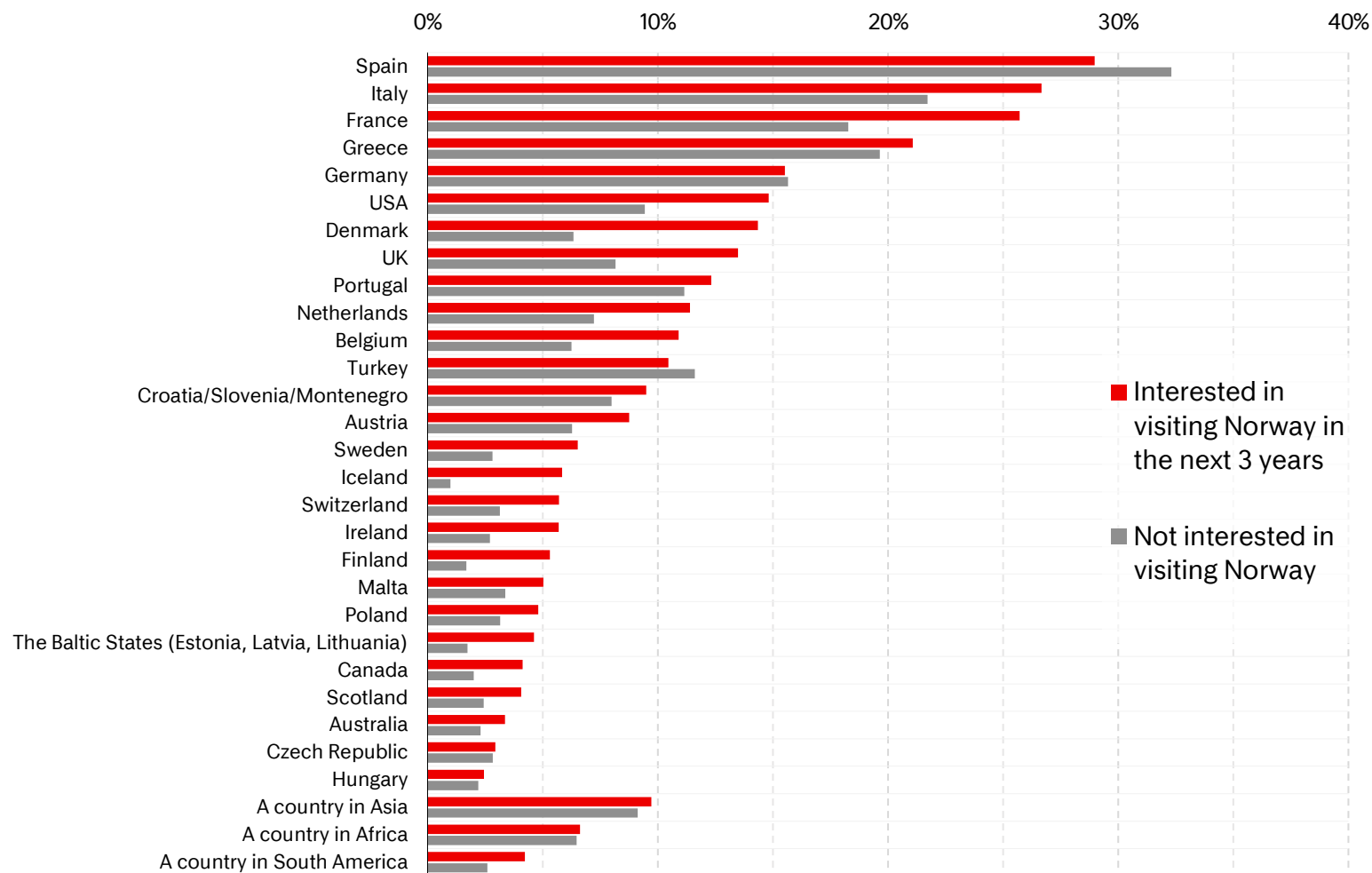
Those who want to visit Norway have more destinations on their wish list than the average

Those interested in visiting Norway are less interested in sun and heat, and less interested in holidaying in Spain and Turkey.

Norway is more likely to be on the wish list of those with the highest incomes in Denmark, the UK, Germany and France.

Those under 35 and more likely to prefer Norway are from the UK, the Netherlands and Denmark, while the oldest considering Norway (55+) are from Germany and Sweden.

Which countries are you planning to visit or considering visiting on a holiday/leisure trip in the next 12 months? Average across markets



This page looks at people who are *interested in travelling abroad in the next 12 months*

Influence of surroundings

Uncertainty is not deterring people from holidaying abroad

In the autumn survey, 62% responded that one of the following factors is influencing or will influence their travel choices 'to a large extent in the next 12 months'. In this survey, that proportion has fallen to 47%.

Although the tourists are less influenced, 8 out of 10 respond that one or more of these factors will influence their travel choices to some extent. Adaptability is perhaps the new normal, and the majority of tourists do it relatively quickly.

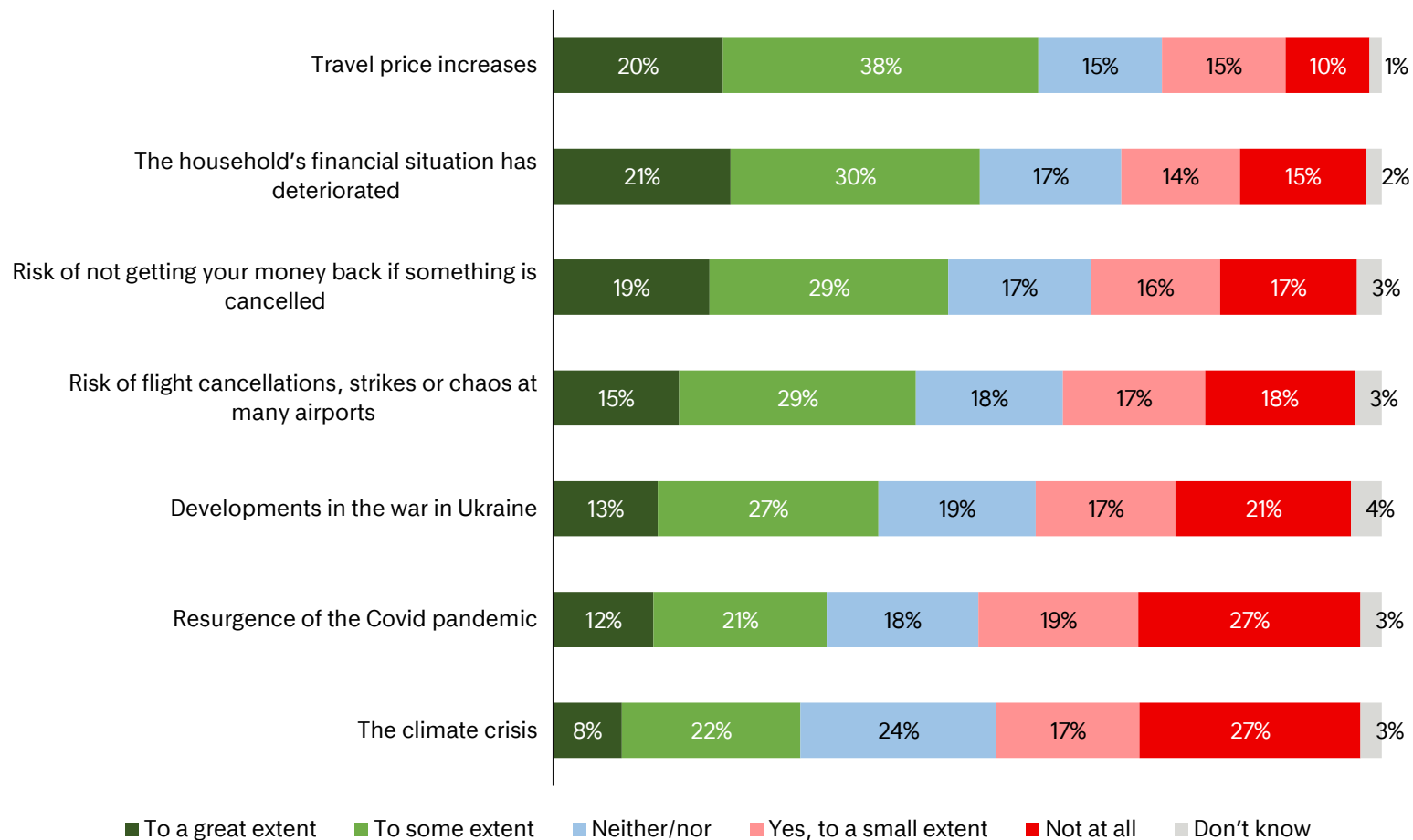
The influence of the war in Ukraine is about on a par with what it was in the autumn. The proportion responding that the climate crisis has no influence whatsoever on their travel choices has increased from 23% to 27% from autumn 2022 to now.



This page looks at people who are *interested in travelling abroad in the next 3 years*

To what extent do you expect the following to influence your travel choices in the next 12 months?

Proportion of those interested in travelling abroad in the next 3 years. Average across markets.



Influence of current events

Price rises, the pandemic, cancellations and the climate crisis have little influence on the tourists

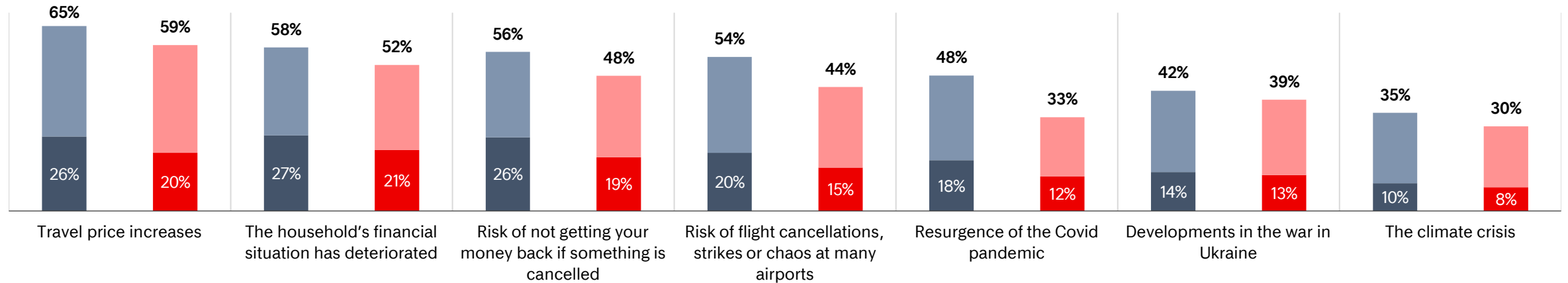
Inflation and a demanding economic situation are influencing the travel choices of a large proportion of the tourists. Those with the lowest incomes are affected the most, together with families with children living at home. Women are significantly more affected than men by the factors measured.

In the UK and France, the tourists are more influenced by the risk of cancellations. The climate crisis also has a greater influence on the travel plans of the tourists in these countries who are considering Norway. Norway is more attractive to Swedes and Danes who respond that the war in Ukraine is influencing their travel plans.

To what extent do you expect the following to influence your travel choices in the next 12 months?

Proportion of those interested in travelling abroad in the next 3 years.

Dark colours and white percentages = 'To a great extent'
Black percentages = 'To a great extent' + 'To some extent'



■ Spring 2023 ■ Autumn 2022



This page looks at people who are *interested in travelling abroad in the next 3 years*

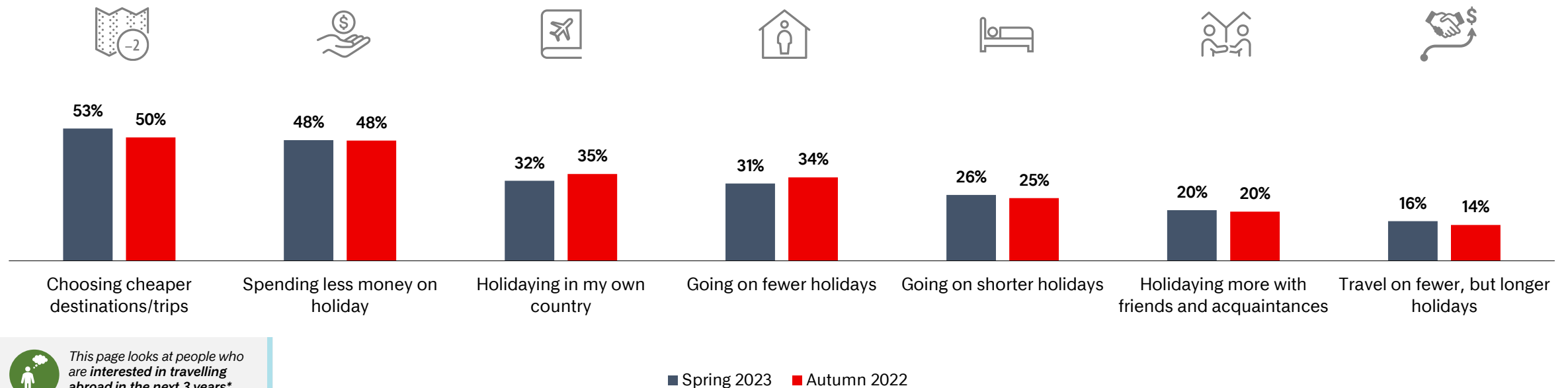
Impact of inflation and the economic downturn

Many are adapting their travel choices to a demanding economic situation

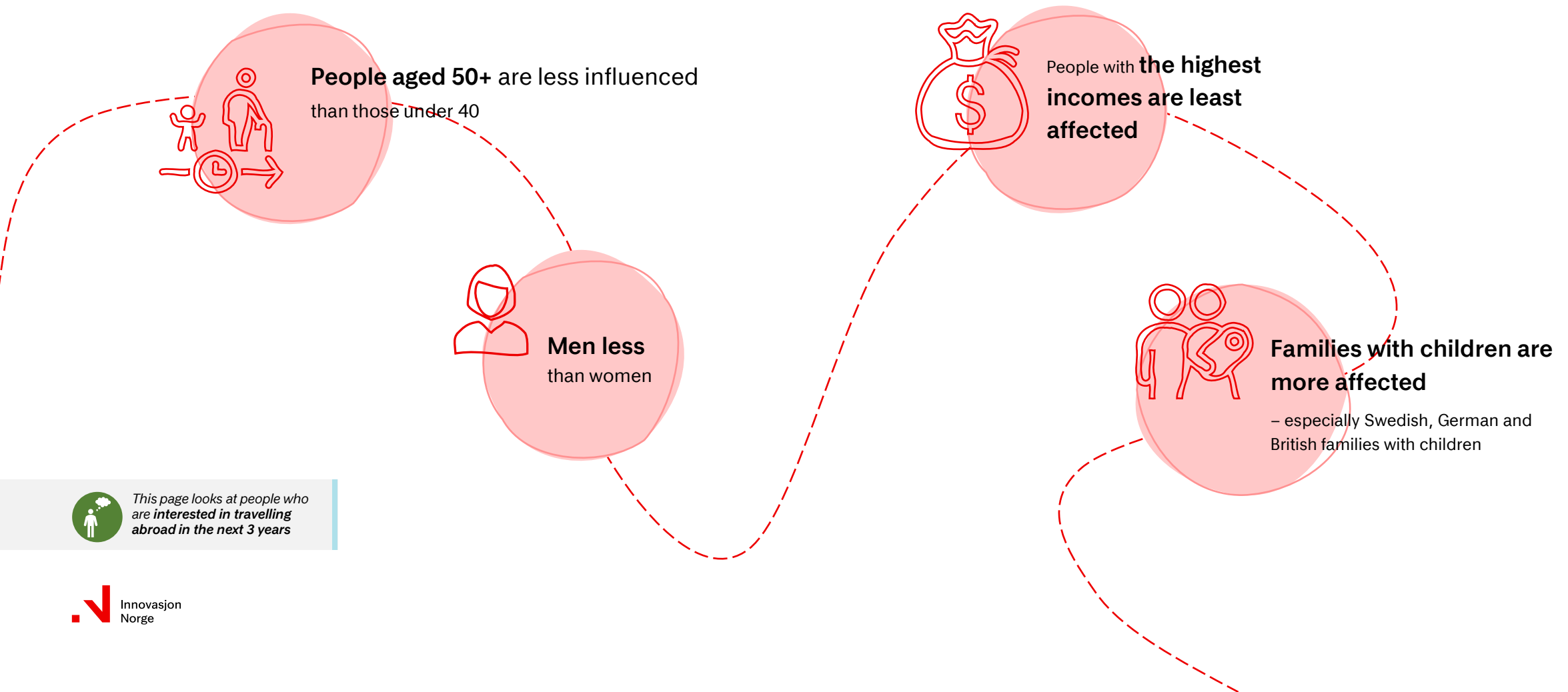
The majority are adapting their travel plans by choosing cheaper destinations and/or by spending less money on holiday than they otherwise would have done.

Men are more likely to choose to shorten their holidays, while women are more likely to prefer cheaper destinations. Those under 35 are more open to fewer and shorter vacations. The differences in how tourists in different income groups adapt to a demanding economic situation are surprisingly small. In general, those with the highest incomes travel significantly more.

How will the economy affect your travel choices? Average across markets



Characteristics of those who are not influenced by a downturn in their household finances



This page looks at people who are *interested in travelling abroad in the next 3 years*

Development of hallmarks relating to brand Norway

Norway is without doubt best known for its magnificent scenery, fantastic fjords and mountains

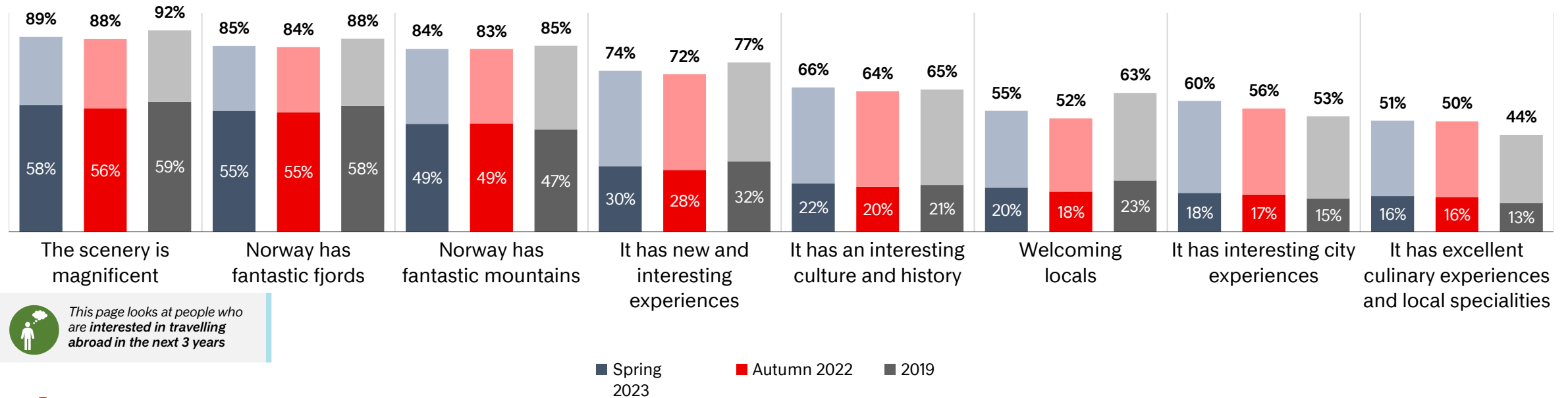
More people than before the pandemic now agree that Norway offers exciting city experiences and good food experiences. There was a significant decline in 'Welcoming locals' across the markets. Those who have holidayed in Norway are more likely to agree that Norway has welcoming locals.

The oldest are especially enchanted by Norwegian nature; the score for magnificent scenery, fantastic fjords and mountains decreases the younger the tourist.

How well do these characteristics match your image of Norway as a travel destination?

Proportion of those who 'Agree' or 'Strongly agree' among those people who are interested in travelling abroad in the next 3 years. Average across markets

Dark colours and white percentages = 'Strongly agree'
Black percentages = 'Strongly agree' + 'Agree'



This page looks at people who are interested in travelling abroad in the next 3 years

Development of brand Norway across age groups

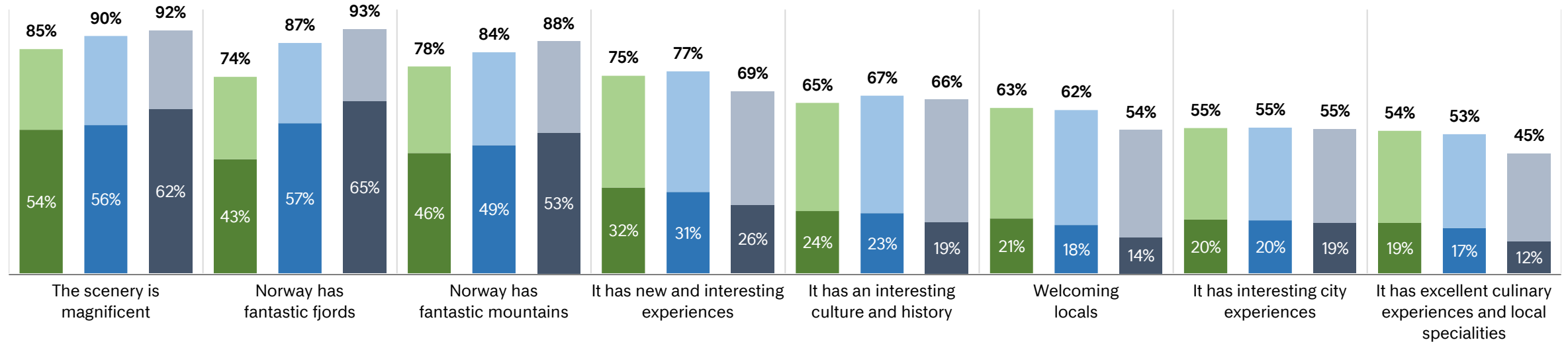
The youngest are less impressed by Norwegian nature

It is difficult to know whether this is because the youngest are not familiar with and do not know about Norwegian nature and its natural attractions, or whether they simply find this less attractive than those who are older. The survey leaves little doubt that the youngest are less fascinated by Norway's nature and more excited about the locals and food experiences.

How well do these characteristics match your image of Norway as a travel destination?

Proportion of those who 'Agree' or 'Strongly agree' among those people who are interested in travelling abroad in the next 3 years. Average across markets

Dark colours and white percentages = 'Strongly agree'
Black percentages = 'Strongly agree' + 'Agree'



This page looks at people who are *interested in travelling abroad in the next 3 years*



18-34



35-55



56+

Interest in traveling to Norway in the next 3 years

Many would like to holiday in Norway in the next 3 years

Between 50% to 70% of those interested in travelling abroad are interested in going on holiday or a leisure trip to Norway in the next 3 years. Now that it is possible to travel in large parts of the world again, it is very encouraging that interest in Norway is high across the markets.

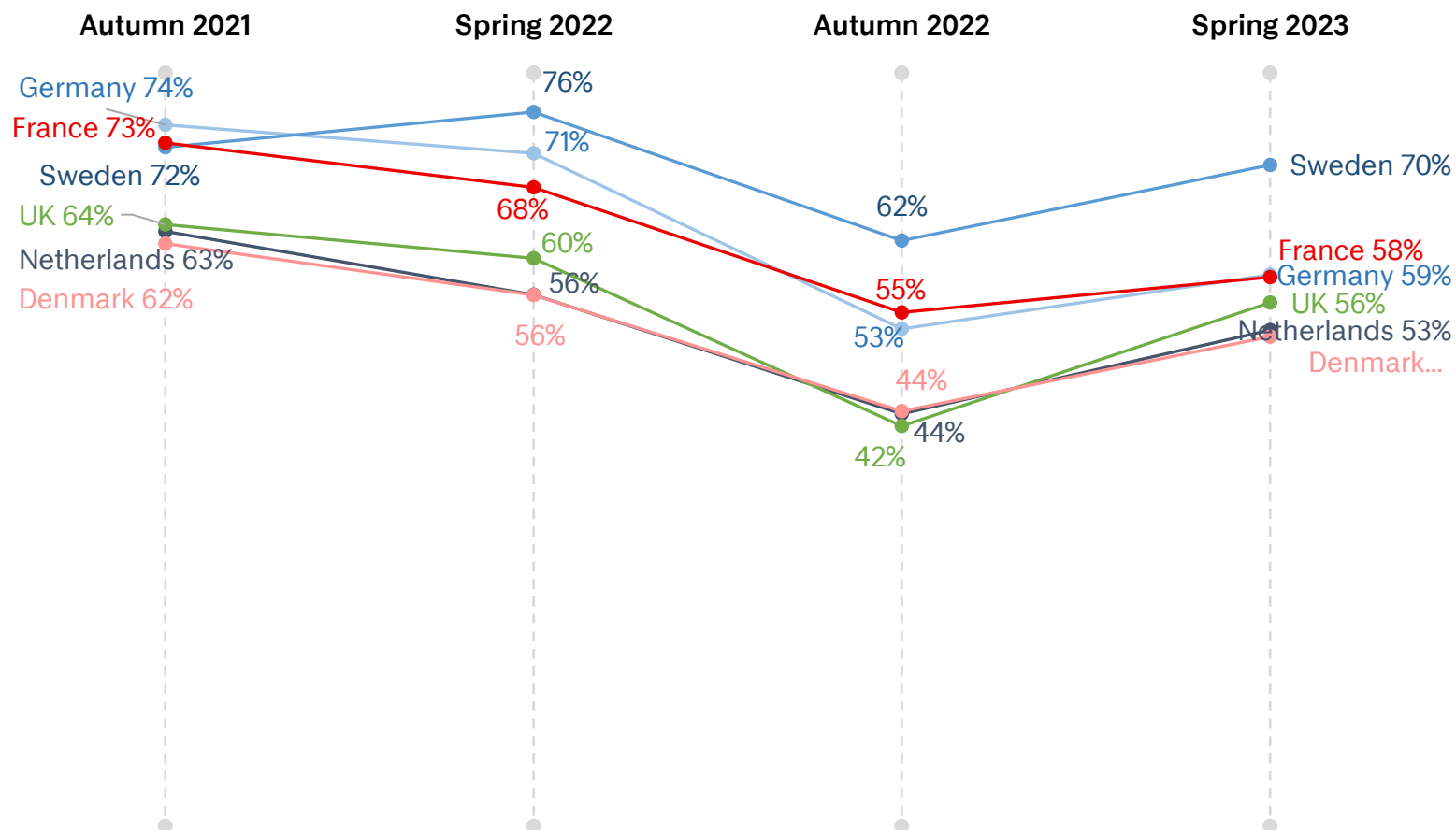
In the next year, we can perhaps expect an influx of older Swedes, young Danes, Brits in pursuit of the Northern Lights, and Germans and Dutch people who enjoy nature experiences.

A very favourable exchange rate means that even those interested in finding affordable destinations and holidays can find what they are looking for in Norway.



This page looks at people who are *interested in travelling abroad in the next 3 years*

Development in the proportion of the target group interested in visiting Norway in the next 3 years
Proportion of people interested in travelling abroad in the next 3 years.



Timing of travel in the next 3 months

Germans and Swedes are most likely to consider a summer holiday in Norway

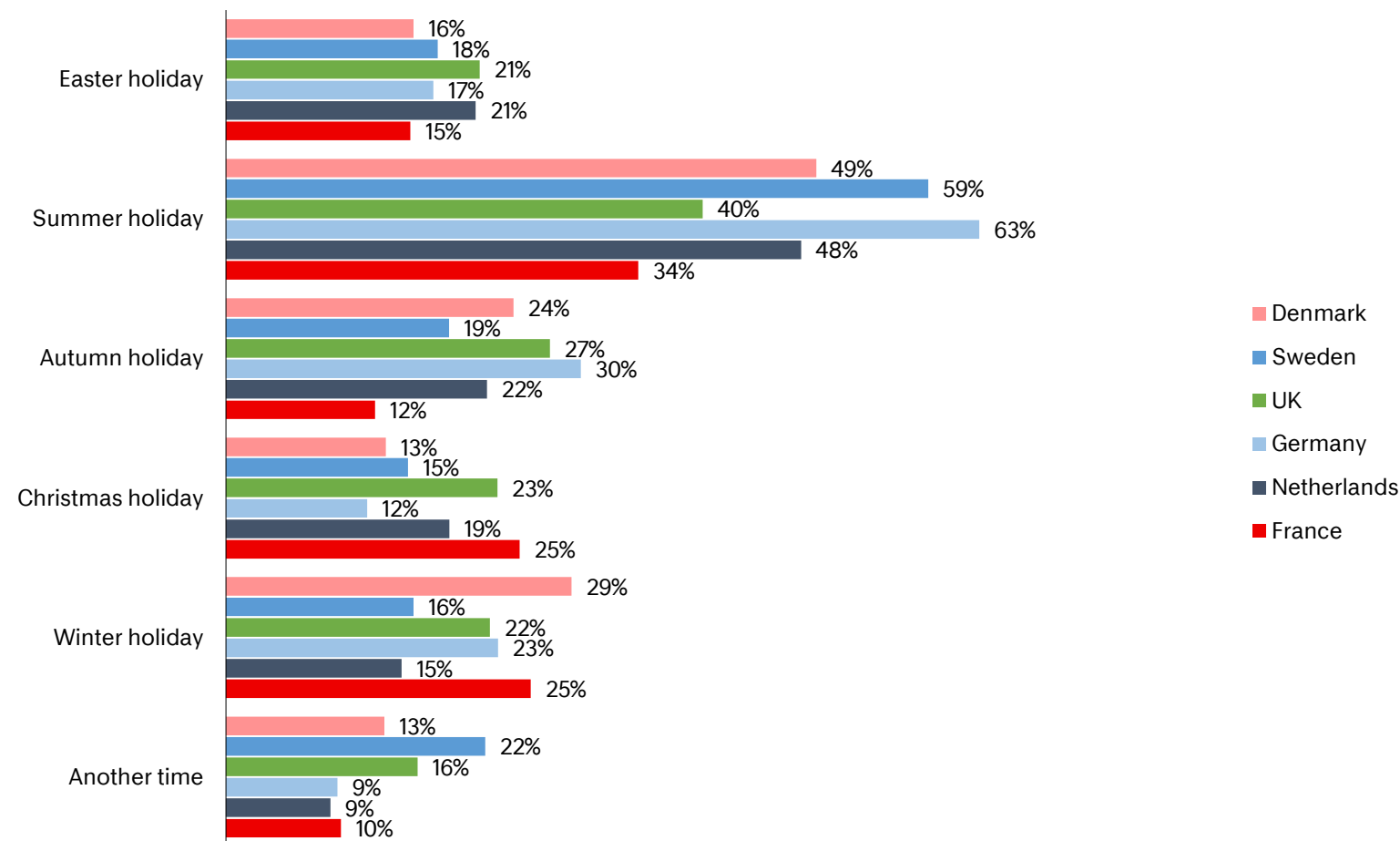
Many are considering Christmas and winter holidays in Norway in the next 12 months.

Swedes and Germans are most likely to consider a summer holiday in Norway. Interest in holidaying in Norway in the summer has fallen in Denmark, the UK and France. They are pushing their Norwegian holidays back.



Those who would like to go on holiday to Norway in the next 3 years

When are you thinking about going on holiday to Norway in the next 3 years? You can select several answers. Proportion of people interested in visiting Norway in the next 3 years.



Holiday experiences in Norway

Nature experiences are a must when on holiday in Norway

Sun and heat, meeting people and socialising, experiencing the local atmosphere and exploring food culture have become more important for those not considering Norway at the start of the spring and summer season.

For those interested in visiting Norway, nature experiences are a must.

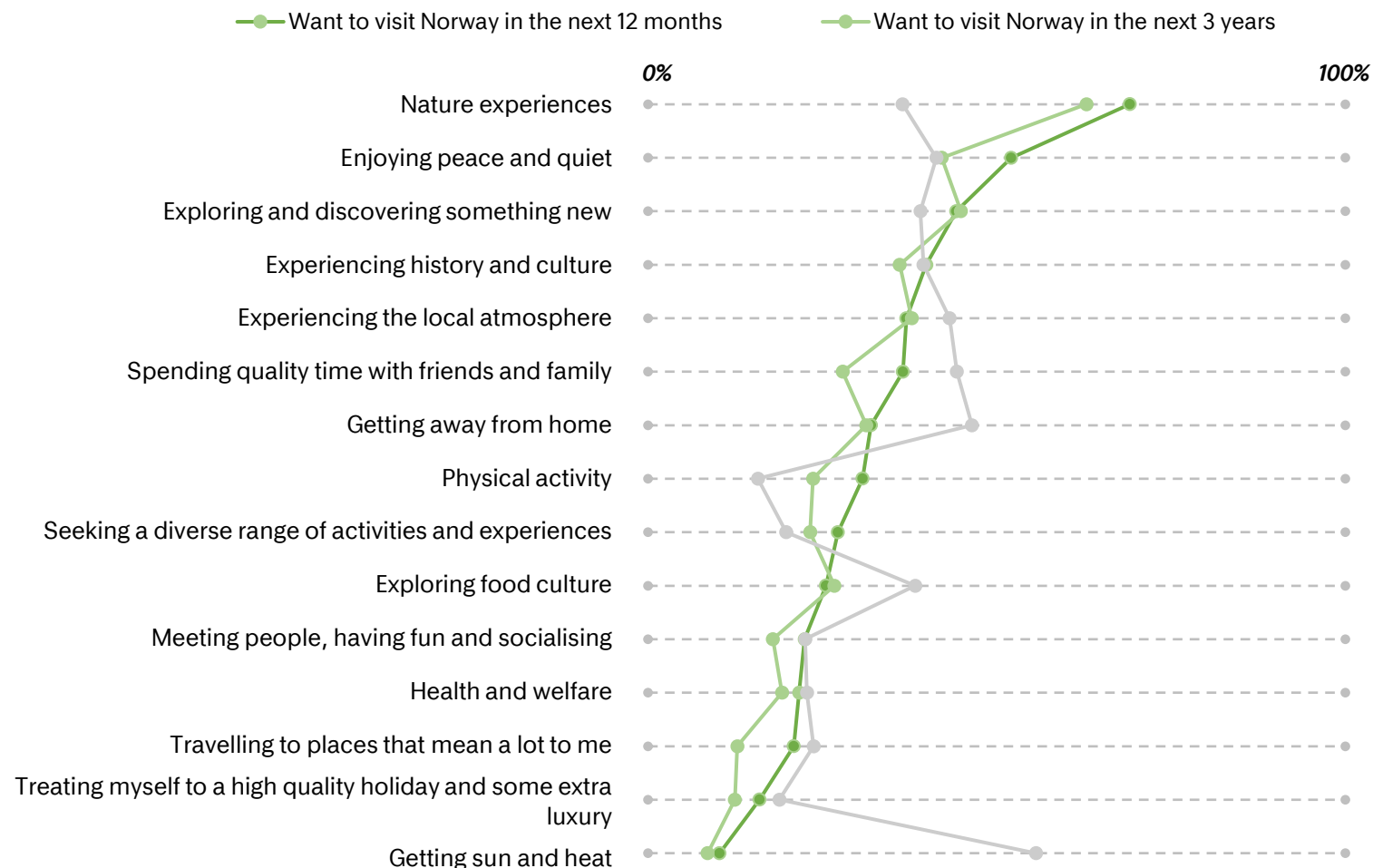
The types of activities, experiences and wishes/motivations behind their holidays distinguish potential Norwegian tourists from other tourists to a much greater extent than other tourist characteristics.



This page looks at people who are interested in travelling abroad in the next 3 years

Which of these experiences are a must when you go on holiday to [Norway/Abroad]?

Please select the most important options

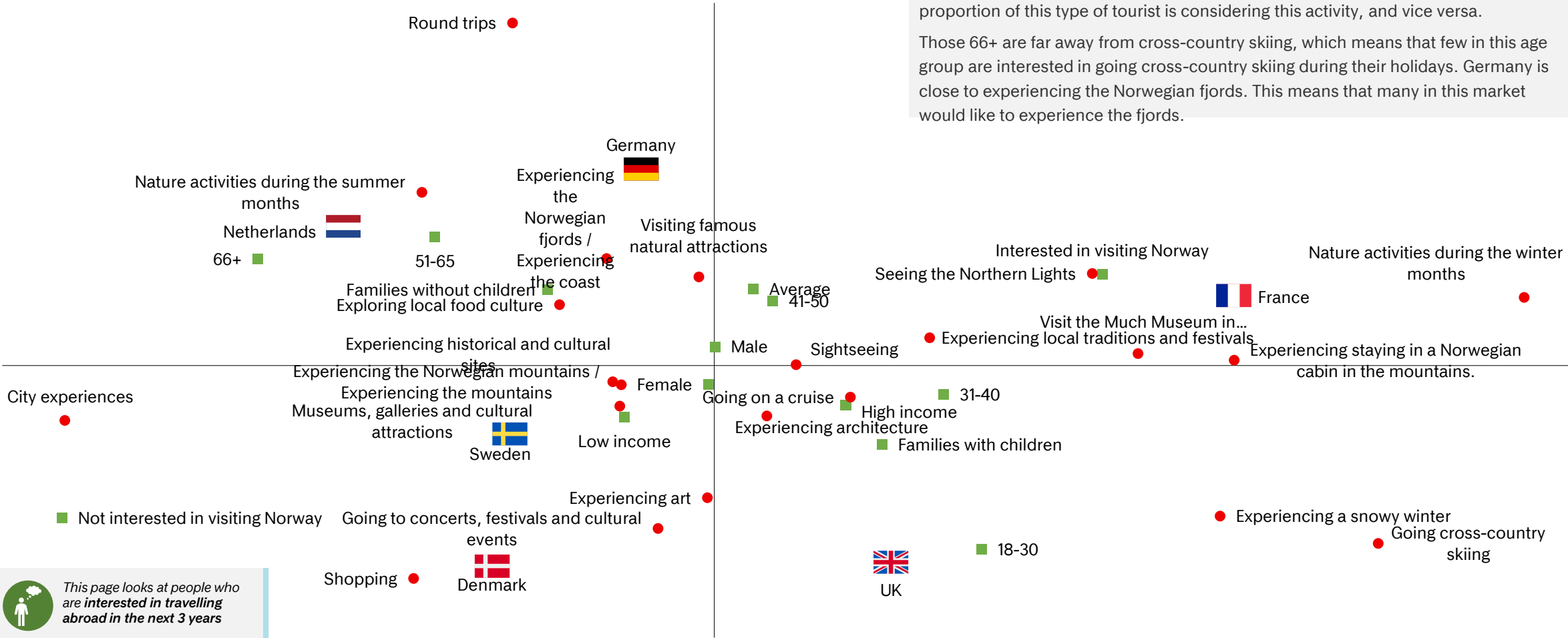



Nature experiences a must when holidaying in No

What the graph shows:

The graph illustrates how different activities relate to each other and to different types of tourists. The farther apart two points in the graph are, the smaller the proportion of this type of tourist is considering this activity, and vice versa.

Those 66+ are far away from cross-country skiing, which means that few in this age group are interested in going cross-country skiing during their holidays. Germany is close to experiencing the Norwegian fjords. This means that many in this market would like to experience the fjords.



 This page looks at people who are *interested in travelling abroad in the next 3 years*

Experiences in Norway and elsewhere in the world

The fjords are a must, as are the Northern Lights and mountains

Nature experiences, fjords, the Northern Lights and mountains, as well as historical and cultural sites, are most important for those considering visiting Norway in the next 12 months.

The mountains and fjords are most important for Danes and Swedes. The Northern Lights top the wish list of everyone outside Scandinavia.

What type of experiences will you seek out on your next holiday abroad/n Norway? The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



This page looks at people who are *interested in travelling abroad in the next 3 years*

Experiences in Norway and elsewhere in the world

Many want to be physically active on their Norwegian holiday

The interest in alpine skiing is highest in Denmark, the UK and Sweden. Outdoor activities in winter are most attractive for tourists from outside Scandinavia.

The interest in outdoor activities in summer is high, especially in Germany and the Netherlands. In this survey, those tourists who want to visit other countries are more interested than those considering Norway. This is because Germans, the Dutch and the French are more likely to want to go cycling and hiking in places other than in Norway.

What type of experiences will you seek out on your next holiday abroad/in Norway? The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



This page looks at people who are *interested in travelling abroad in the next 3 years*

Experiences in Norway and elsewhere in the world

Many people want to experience culture and history in Norway

Once people have decided to visit Norway, they also want to experience history and culture. Cultural experiences are a natural part of the holiday for tourists on a potential holiday in Norway.


What type of experiences will you seek out on your next holiday abroad/in Norway? The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



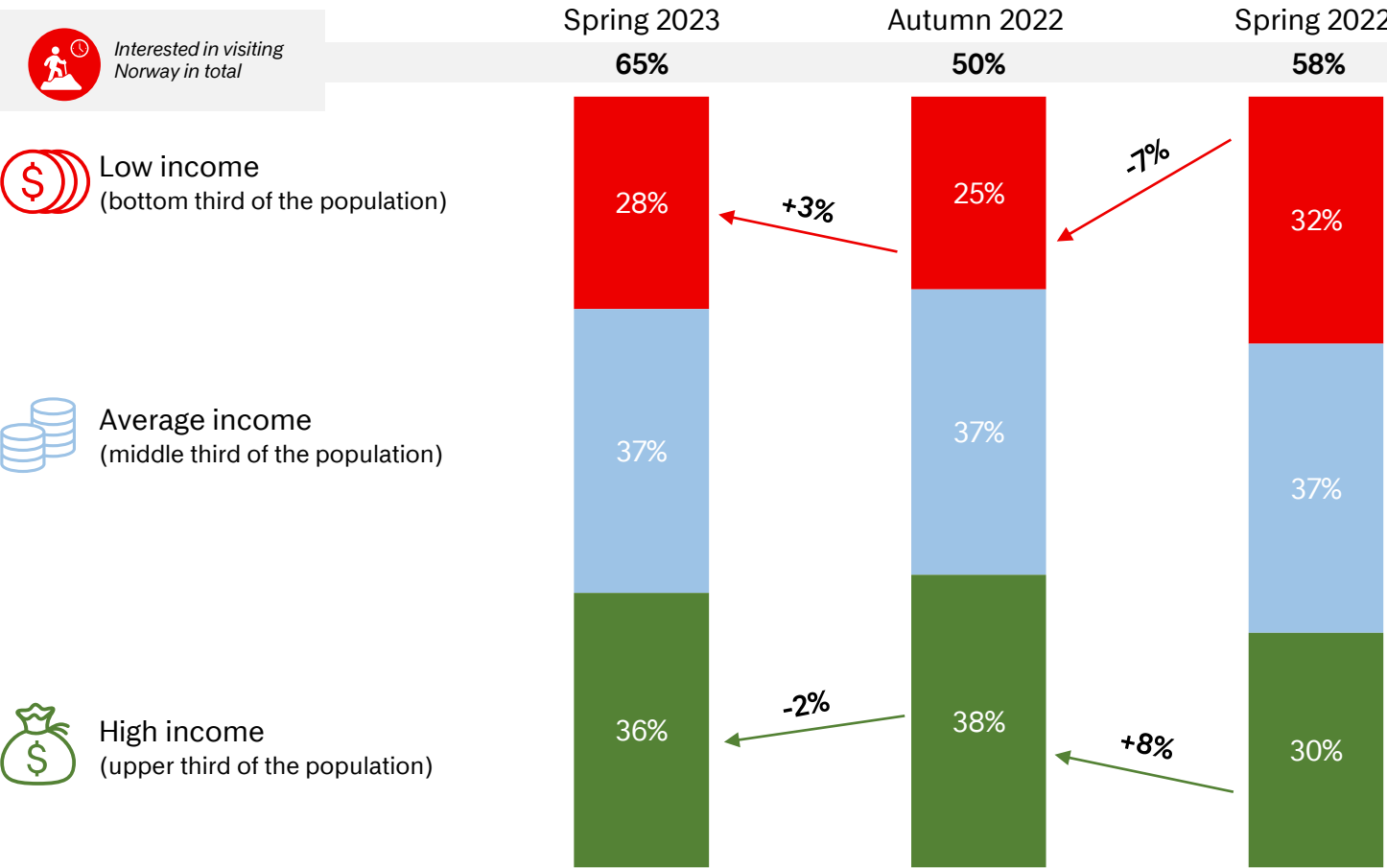
This page looks at people who are *interested in travelling abroad in the next 3 years*

Interest in Norway is stable among those with average incomes

Interest in Norway has increased again after a sharp fall last autumn. Price rises and an uncertain economic situation are influencing the travel plans of those with the lowest income. In the group considering Norway now, a larger proportion have high incomes than was the case a year ago. In the group considering Norway in the next 12 months, an even larger proportion have high incomes than among those interested in visiting here in the next 3 years.

 Those who would like to go on holiday to Norway in the next 3 years

Income level of people interested in visiting Norway in the next three years
Average across markets



Sustainability over time

The majority act responsibly with respect to nature, the environment and the climate when travelling

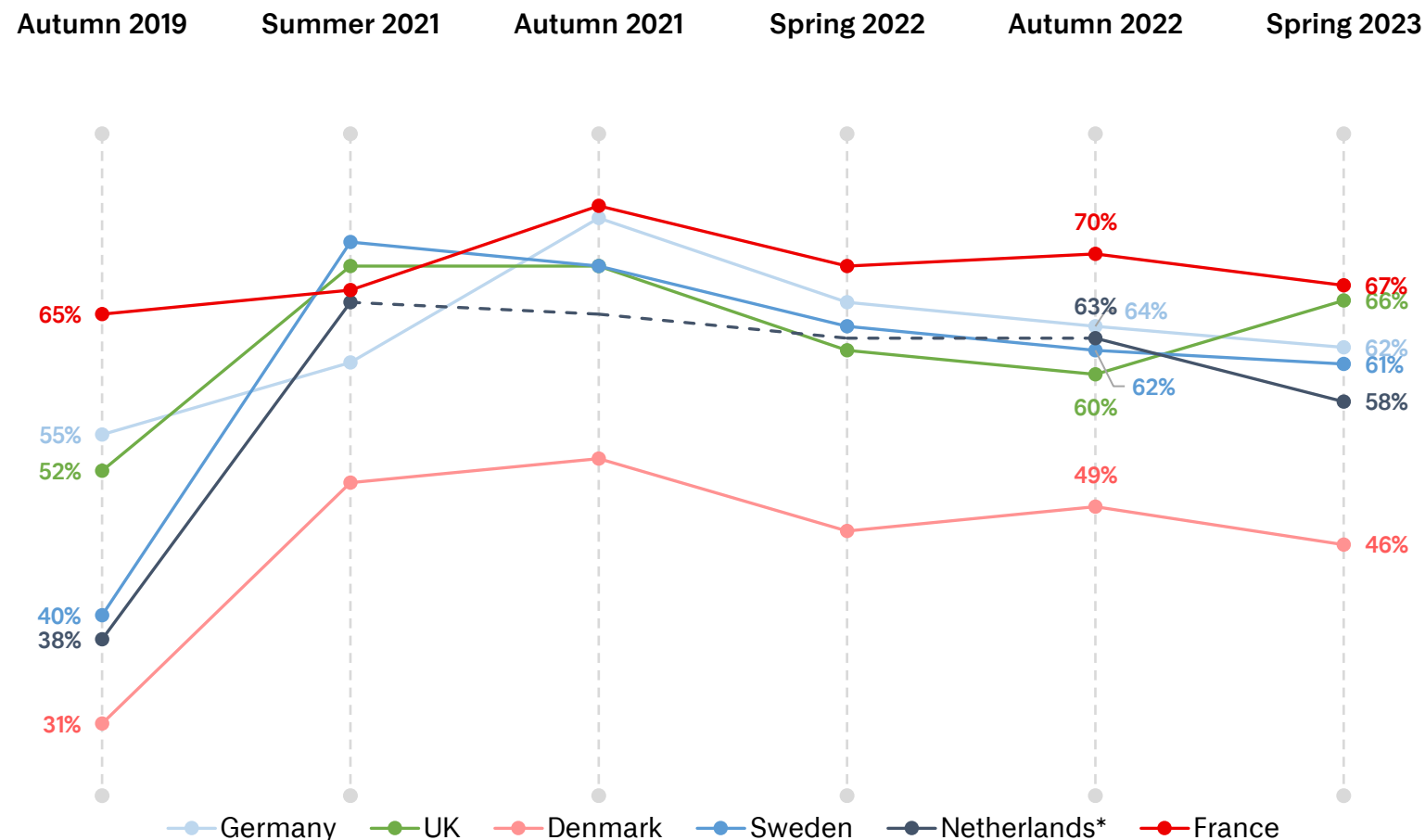
The proportion who take responsibility for ensuring that their travel does not have an adverse impact on nature, the environment and the climate is stable and high in all markets. There was a marginal decline in most countries following the outbreak of the war in Ukraine and increasing challenges due to inflation and political and economic turbulence.

Those considering visiting Norway are more concerned with acting responsibly in relation to nature and the environment than the average tourist.



This page looks at people who are *interested in travelling abroad in the next 3 years*

To what extent do you agree or disagree with the following statement: I am keen to ensure that how I travel does not have an adverse impact on nature, the environment and the climate**. Percentage who responded strongly agree or disagree.



*The Netherlands in Autumn 2021 and Spring 2022 is hidden due to a translation error, but the trend from Autumn 2021 to Spring 2022 represents a drop in line with other markets.

** In 2019 this was phrased as follows: I'm considering changing the way I travel due to concerns about the environment/climate.

Measures for more sustainable travel

Fly less and more climate-friendly modes of transport

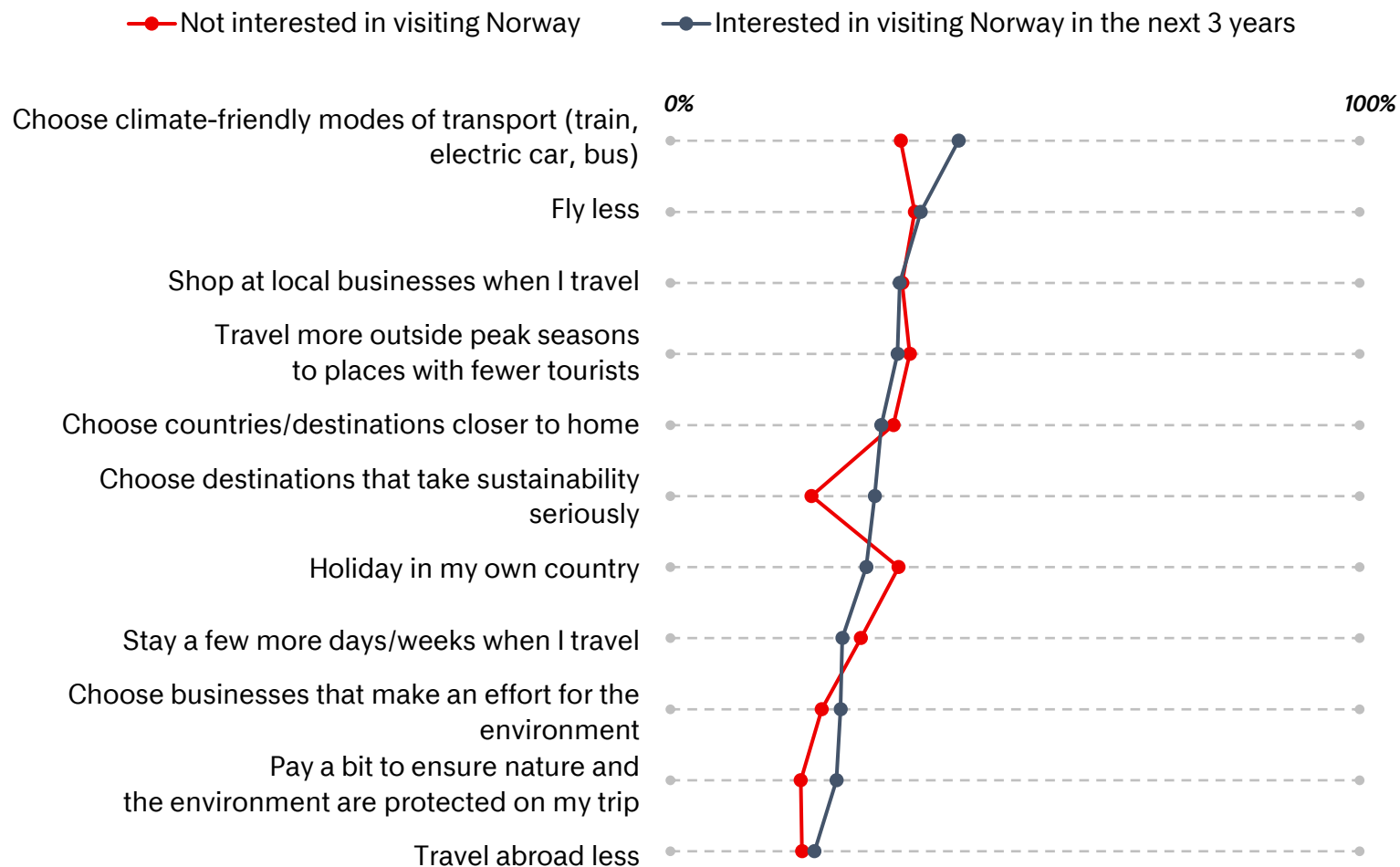
Climate-friendly transport was an option in the survey for the first time. It scores the highest or second highest in all markets. It is generally more important for those considering Norway than for other tourists.

The oldest want to shop more locally, fly less and travel outside peak season, the youngest are more likely to choose more climate-friendly transport when travelling.



This page looks at people who are *interested in travelling abroad in the next 3 years*

Will you do any of the following to prevent the way you travel from having a negative impact on the environment, climate and nature? Proportion of active tourists. Average across markets.



Measures for more sustainable travel

More people want to stay longer when they travel

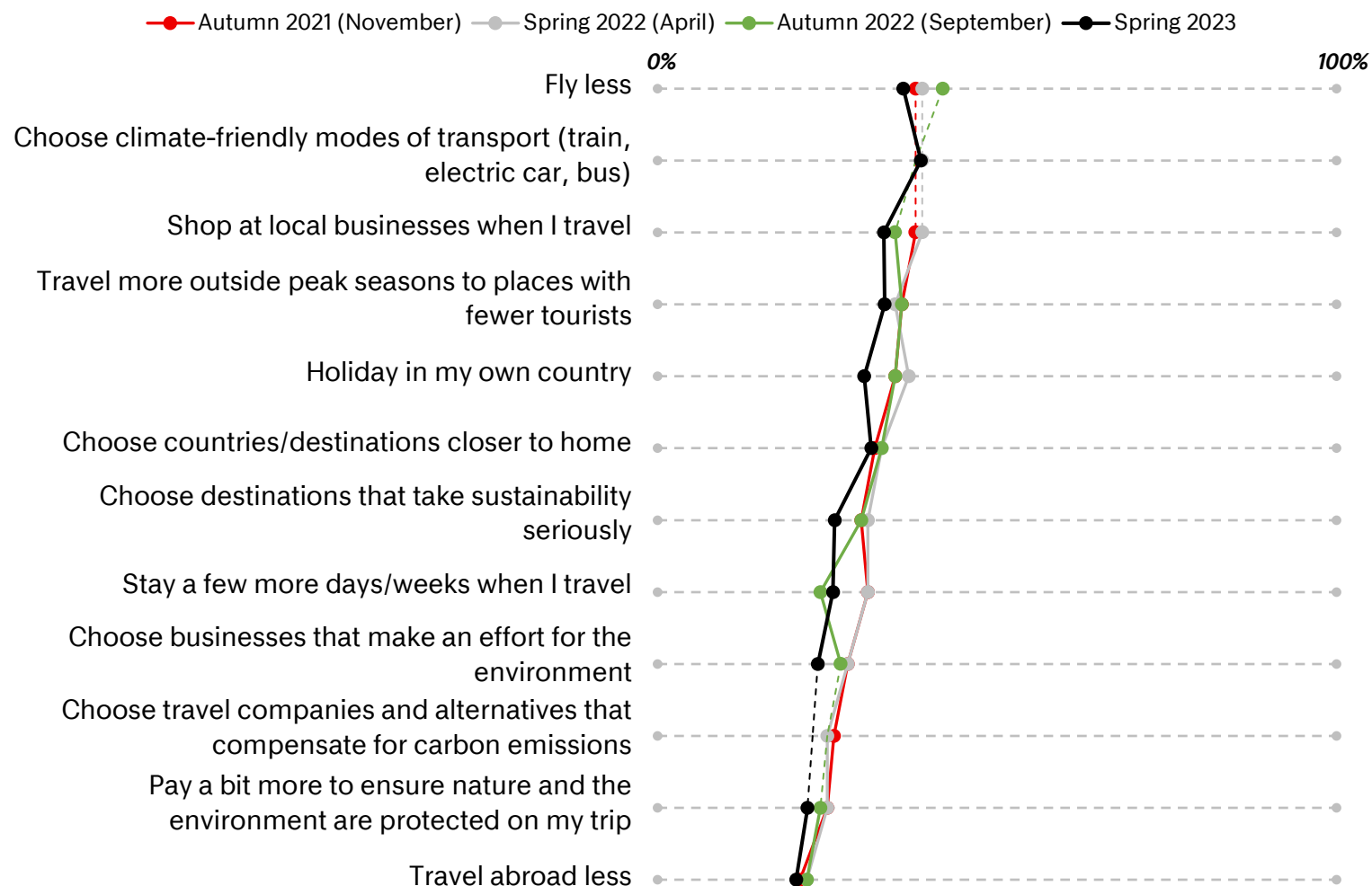
Some 60% will take 3 or more of the measures to ensure that how they travel does not have an adverse impact on the environment, climate and nature.

The scores for many of these measures are lower in this survey than before. This may be because the list of alternatives has grown. Climate-friendly transport was added in spring 2023 and travel alternatives with climate compensation in autumn 2021.



This page looks at people who are *interested in travelling abroad in the next 3 years*

Will you do any of the following to prevent the way you travel from having a negative impact on the environment, climate and nature? The proportion interested in travelling abroad in the next 3 years and who want to ensure that how they travel does not have an adverse impact on the environment, climate and nature. Average across markets.



Norway is a sustainable choice

Visiting Norway is a sustainable choice for many people, especially Swedes

In Sweden and Denmark, visiting Norway is perceived as being more sustainable now than before the pandemic.

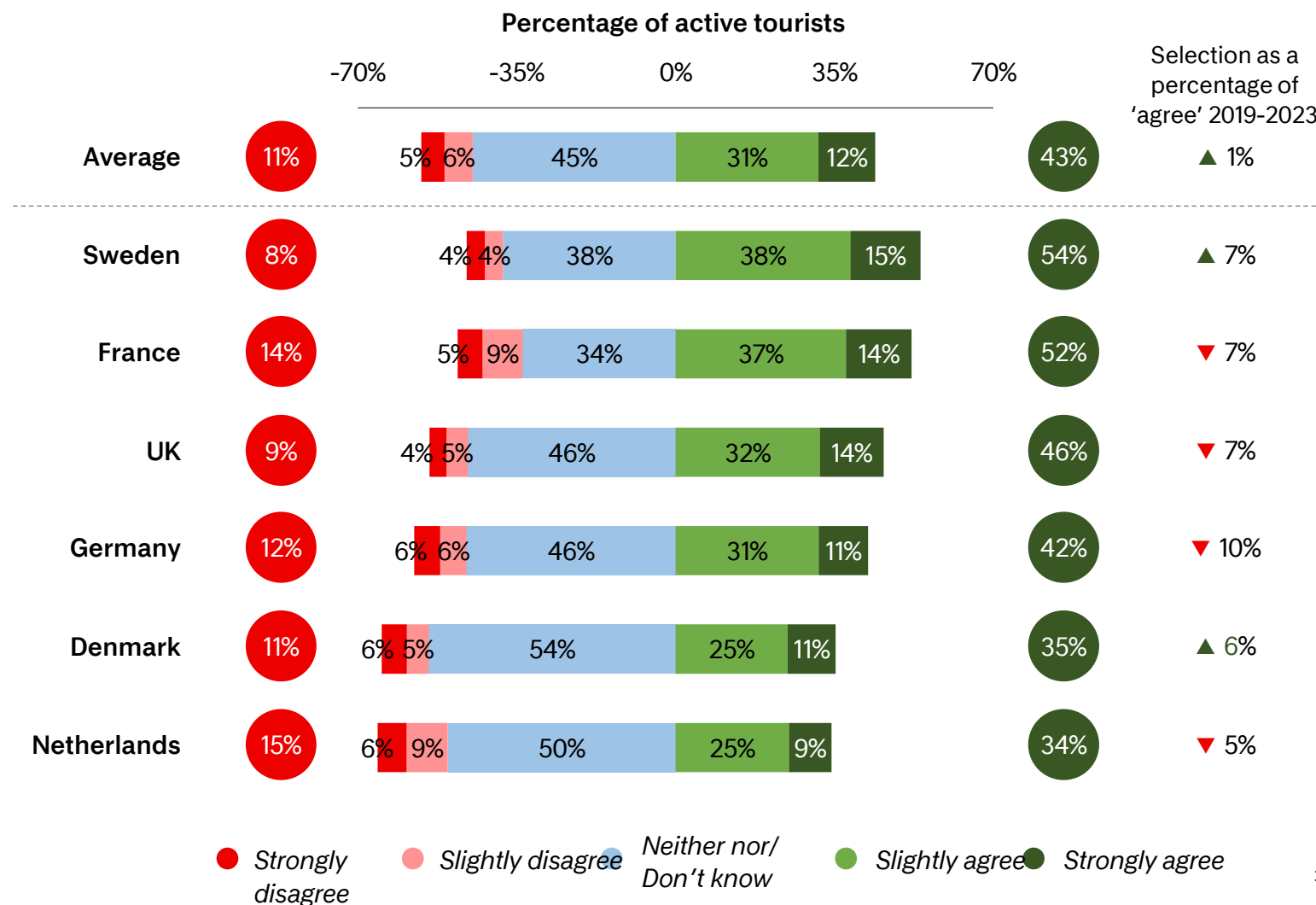
Those interested in Norway are far more likely to believe that visiting Norway is a sustainable choice for them.

The young, families with children, men and those with the highest incomes are more likely to perceive visiting Norway to be a sustainable choice for them.



This page looks at people who are *interested in travelling abroad in the next 3 years*

To what extent do you agree or disagree with the following statement:
Travelling to Norway will be a sustainable choice for me.



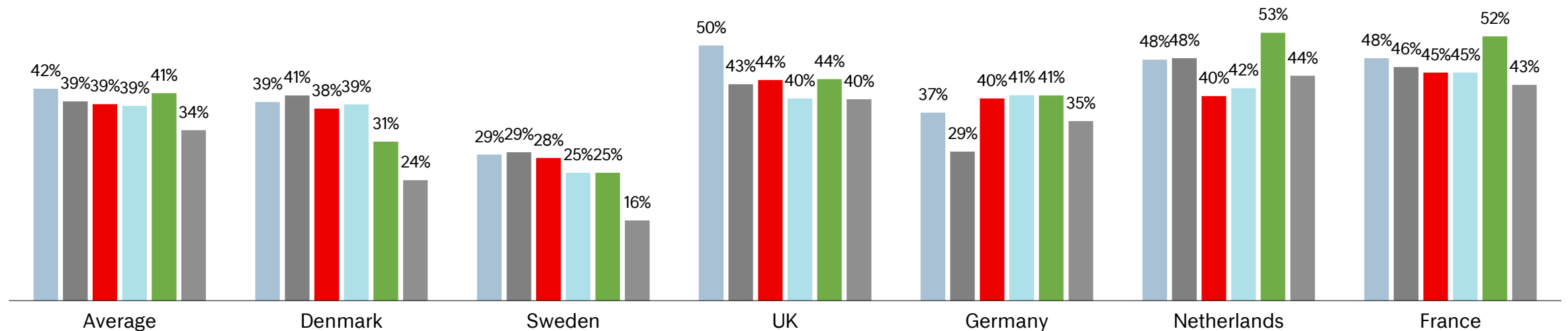
A stable, high percentage want a package holiday when holidaying in Norway

The proportion responding that they would like to purchase a package holiday when visiting Norway has been stable for the past 2 years. However, fewer of those who want to visit Norway in the next 12 months will book their trip via a tour operator or travel agent. They are more likely to plan and organise their trip themselves.

You have responded that you would like to holiday in Norway in the next 3 years. How are you most likely to book your holiday in Norway?

"I would book most of my holiday with a tour operator who is able to organise package trips that include most things (e.g. transport and accommodation)"

Proportion who said 'Yes' among those planning or considering a holiday in Norway in the next 3 years.



Those who would like to go on holiday to Norway in the next 3 years


■ Spring (2023) ■ Autumn (September 2022) ■ Spring (April 2022) ■ Autumn (November 2021) ■ Summer (July 2021) ■ Spring (April 2021)

Destinations in the next 12 months

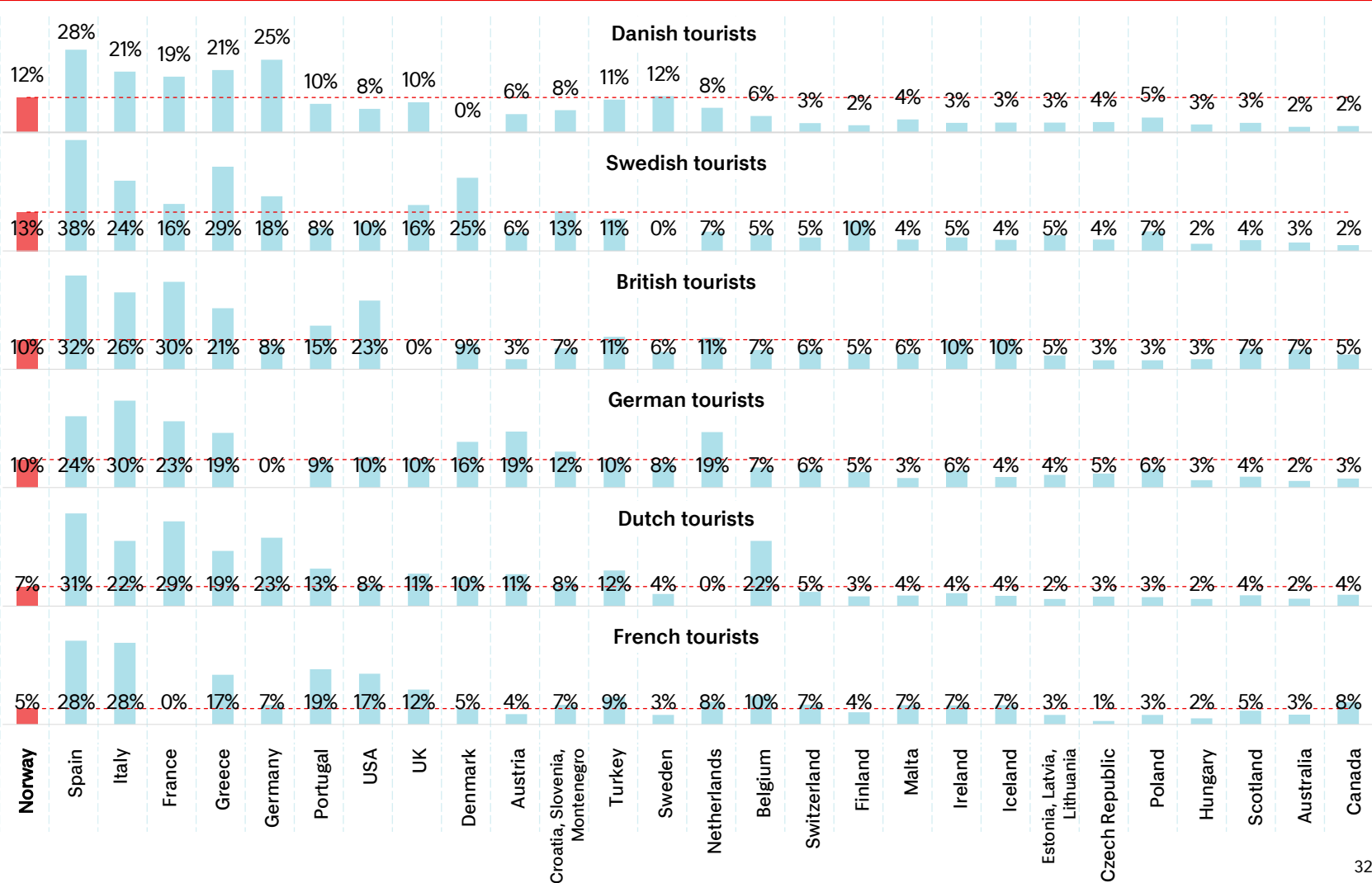
Norway is higher on the wish list in almost all markets

Norway's ranking over time:

| | Sum mer 2021 | Autu mn 2021 | Sprin g 2022 | Autu mn 2022 | Sprin g 2023 |
|----|--------------------|--------------------|--------------------|--------------------|--------------------|
| DK | #7 | #9 | #9 | #10 | #6 |
| SV | #6 | #9 | #10 | #11 | #8 |
| EN | #17 | #14 | #18 | #27 | #9 |
| DE | #16 | #13 | #12 | #15 | #9 |
| NL | #15 | #12 | #16 | #13 | #14 |
| FR | #14 | #9 | #19 | #20 | #17 |

 This page looks at people who are interested in travelling abroad in the next 12 months

Which countries are you considering or planning to visit on a holiday/leisure trip in the next 12 months? The percentages indicate the proportion of those interested in travelling abroad in the next 12 months



Innovation Norway

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

www.innovasjon norge.no

Epinion Copenhagen

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