

Travel Barometer – Autumn 2022

Survey conducted in the United Kingdom, Germany, Sweden,
Denmark, the Netherlands and France in September 2022

Report – Innovation Norway

Introduction

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BACKGROUND

Innovation Norway has been producing a Travel Barometer on a regular basis since the spring of 2020. This Barometer examines and provides insights into our desire to travel, our expectations and any barriers that exist in the Norwegian market and the markets in Sweden, Denmark, Germany, the Netherlands, England and France.

At the moment the travel plans of more than fifty per cent of travellers are being affected by the unrest and uncertainty generated by heavy price increases and war in Europe. The survey that we conducted one year ago was characterised by optimism and the fact that many people were wanting to make up for what we had lost during the pandemic. Interest in Norway has suffered a major hit in this survey as a result of these heavy price increases, unrest and uncertainty.

This report contains the main findings shown in the foreign market survey that was conducted during the second half of September. The report was produced for Innovation Norway by Gyger and Epinion.

DATA AND READER GUIDE

The analysis is based on interviews of 4,646 potential tourists*. 700-800 in each of the markets in Germany, France, England, the Netherlands, Sweden and Denmark. The data was collected between 13 September and 21 September.

The first part of the report presents the overall results across the markets. The second half of the report presents an overview the characteristics of people who are thinking about visiting Norway.

* Target group surveyed:

The survey is based on interviews of potential tourists. Potential tourists are defined as tourists who have travelled abroad for holiday or leisure purposes in the past 3 years and who are also interested in holidaying abroad in the next 3 years. The interviews were limited to certain geographical areas in some countries (see page 7).



Summary of findings



More people are wanting to travel abroad over the next 3 years in all six markets with the exception of Germany. Over the next 3 years and the next 12 months Norway is less attractive than it has been during the last year. Being associated with being cold and expensive during a highly uncertain economic climate is probably not a competitive advantage. Interest remains highest in high-income groups.



Price increases on travelling and a demanding economic situation for many households are having an impact on the travel plans of more than fifty per cent of travellers. This means that many people are wanting to go on fewer holidays and choose cheaper destinations. High-income groups are less affected by price increases and want to do more travelling.



Interest in Norway showed a sharp decline in all markets in this autumn's survey. There has been a decline in all the brand surveys covering beautiful scenery when compared to the pre-pandemic surveys. It is especially the youngest target groups that agree to a lesser extent that Norway is characterised by magnificent scenery and fantastic fjords and mountains.



Sustainability was much more important to more people during the pandemic – across all markets and age groups. In all markets, with the exception of Denmark, more than 60 percent of travellers are keen to take responsibility for ensuring that "the way I travel does not have a negative impact on nature, the environment and the climate". There are fewer people outside Scandinavia who agree that travelling to Norway is a sustainable choice for them.

Travel plans are being affected by unrest and uncertainty



The pandemic is receiving less attention, but it is still creating uncertainty

What are we seeing?

The pandemic is still affecting travel choices for around 50% of travellers. Especially in Germany and Denmark.



How is this affecting travellers?

There are strong indications that the pandemic is affecting destination choices and is adding an extra dimension of uncertainty.



Young people are traveling less

What are we seeing?

The desire of young people to travel has decreased since our last survey.



How is this affecting travellers?

Fewer people under the age of 35 are wanting to visit Norway during the next 3 years. This is having a great impact on the types of experiences being prioritised by people wanting to travel to Norway. More nature and history.



Heavy price rises and an uncertain economic situation are affecting people's travel plans

What are we seeing?

Inflated travel prices are affecting more than 50 per cent of travellers.



How is this affecting travellers?

Over the next 3 years and the next 12 months Norway is less attractive than it has been during the last year.



The uncertain situation is affecting markets in different ways

What are we seeing?

Norway is less attractive outside Scandinavia.



How is this affecting travellers?

Many people are placing priority of undertaking fewer trips and travelling to neighbouring countries. Many people are choosing cheaper destinations and are wanting to spend less money on their holidays.

Main findings per market

England

The desire to travel increased, but England is the market most affected by price increases and economic downturn. Interest in Norway plummeted by just under 20 percentage points. Those thinking about international travel during the next 12 months are considering far fewer destinations than previously and Spain is at the top of the list, although both France and the United States have seen an upswing. The Northern Lights are still on the wish list of many.

Germany

The desire to travel is waning and has returned to the same level as that which applied during the pandemic. This is having a severe impact on interest in Norway. In our previous two surveys, around 70 per cent of the target group were interested in travelling to Norway. This has now dropped to 52 per cent. Price increases and a deteriorating economic situation are affecting between 60 and 70 per cent of travellers. Those wishing to visit Norway want to include nature experiences, peace and tranquility.

France

The desire to travel in France has increased significantly since our previous survey. 70% are thinking about travelling abroad during the next 12 months. Italy and Spain are at the top of the list and at the same time more people are thinking about travelling to Norway than they were during our previous survey. Inflated travel prices and the risk of cancellations is affecting more than 60 per cent of French travellers. Nature experiences, culture and history are important for more than 50 per cent of people holidaying in Norway.

Netherlands

The desire to travel in the Netherlands has returned at more or less the same level as that which applied before the pandemic. The Netherlands stands out with inflation, war, the coronavirus and the climate have less of an impact on travel choices. Interest in traveling to Norway has also dropped there. The Dutch are considering far fewer destinations now than in April, which indicates that they are being more reticent, even though when compared to the other countries fewer Dutch people are affected by unrest and uncertainty.

Denmark

The desire of the Danes to travel has returned to pre-pandemic levels and 5 per cent of the population are wanting to travel to Norway during the next 12 months. This is lower than last year. Interest in Norway is waning and inflation and economic downturn are affecting Danish holiday choices. As far as the Danes are concerned, Norwegian holidays are all about nature experiences, quality time, skiing and physical activities during the winter and summer. The Danes prefer winter holidays in Norway.

Sweden

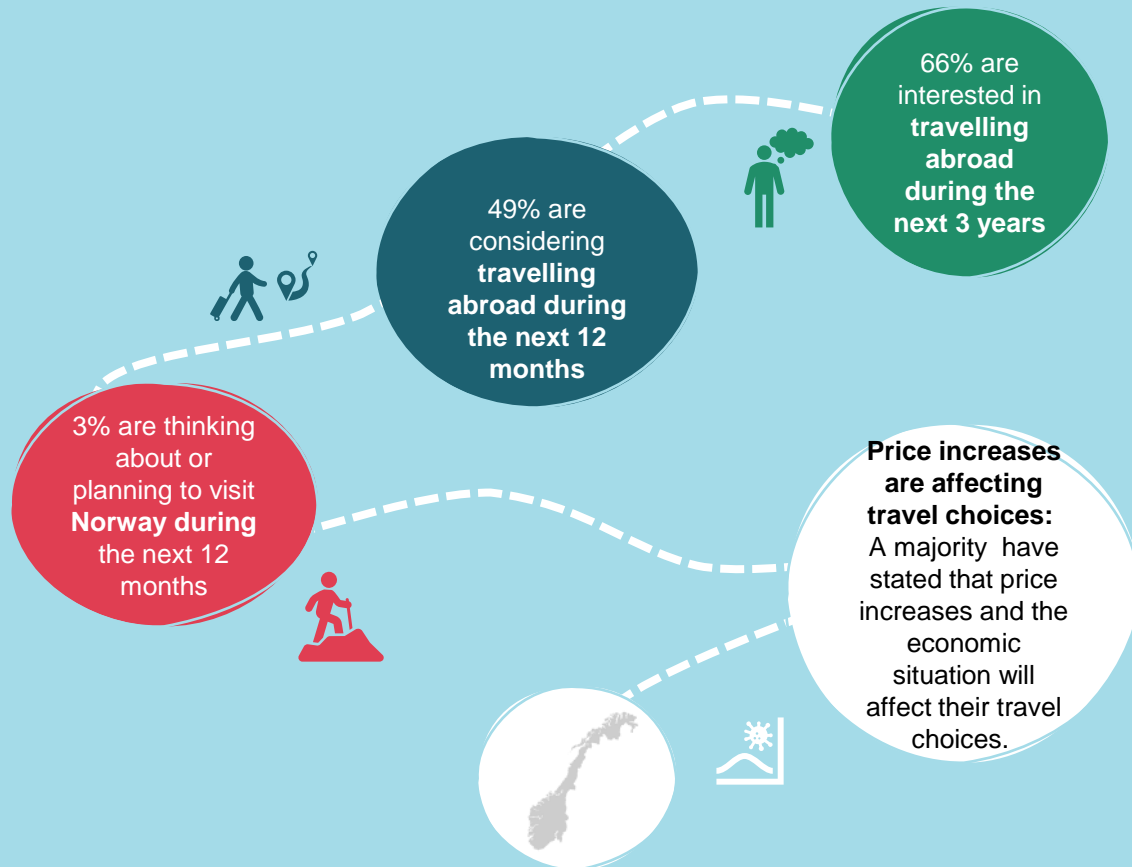
The war in Ukraine is affecting the travel choices of Swedes more than in most other markets, although even in Sweden inflation and the economy are the main factors. Spain is a clear winner for Swedes, who are also considering fewer destinations. Interest in Norway has picked up over the past year, after a low during the pandemic. This survey has once again shown a substantial decline in interest.



Future travel expectations

How many people are expecting to take a foreign holiday during 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



There is an increase in the percentage of people interested in travelling abroad during the next 3 years in all markets, with the exception of Germany. The percentage of people considering travelling abroad and to Norway during the next 12 months is significantly lower than it was in our corresponding survey conducted at the same time last year. The optimism we saw in our Travel Barometer during the autumn of 2021 has been replaced by a more hesitant attitude as a result of price increases and a demanding economic situation.

The desire to travel remains highest in the group with the highest income. Many people are wanting to choose cheaper destinations and fewer trips.

Interest in travelling to Norway has fallen sharply both for the next 12 months and over the next 3 years.

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** which is interested in travelling abroad on a holiday or leisure trip during the next 3 years (marked in green on the right). This group still constitutes a smaller percentage of the population now than it did before the pandemic in all of the markets except for France and Denmark.
- The report particularly focuses on those thinking about or planning to travel abroad during the next 12 months (marked in blue on the right)
- Special attention is paid to those who are considering visiting Norway in the next 12 months (marked in red), as well as those interested in visiting Norway in the next 3 years (also marked in red).

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 go on holiday to Norway during the next 3 years

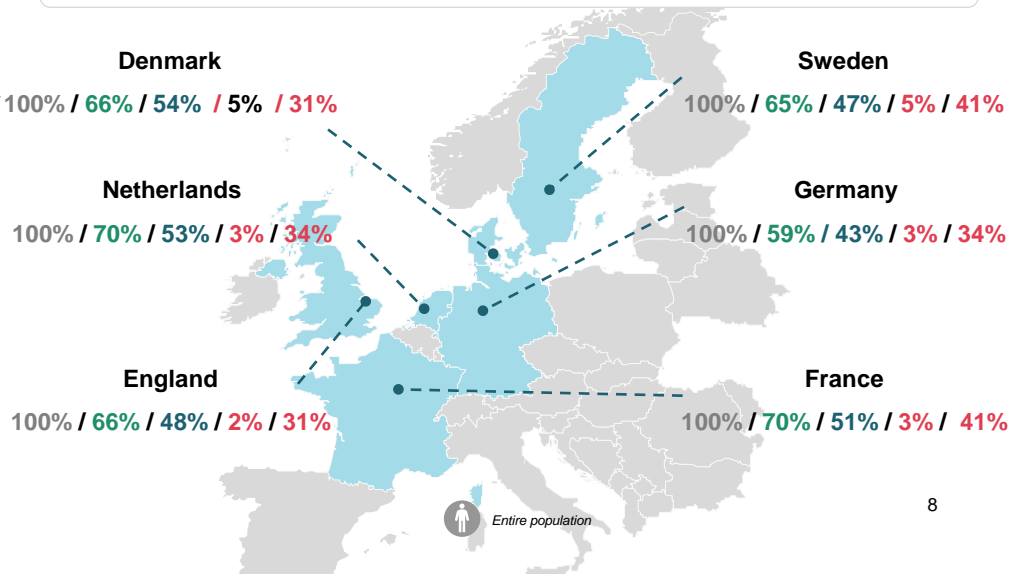
Areas in which interviews were conducted:

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



Percentage of the population interested in holidaying abroad during the next 3 years

The percentage is rising compared to April 2022 in all markets, except in Germany where it is falling sharply.

Definitions of potential tourists before and after the coronavirus

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

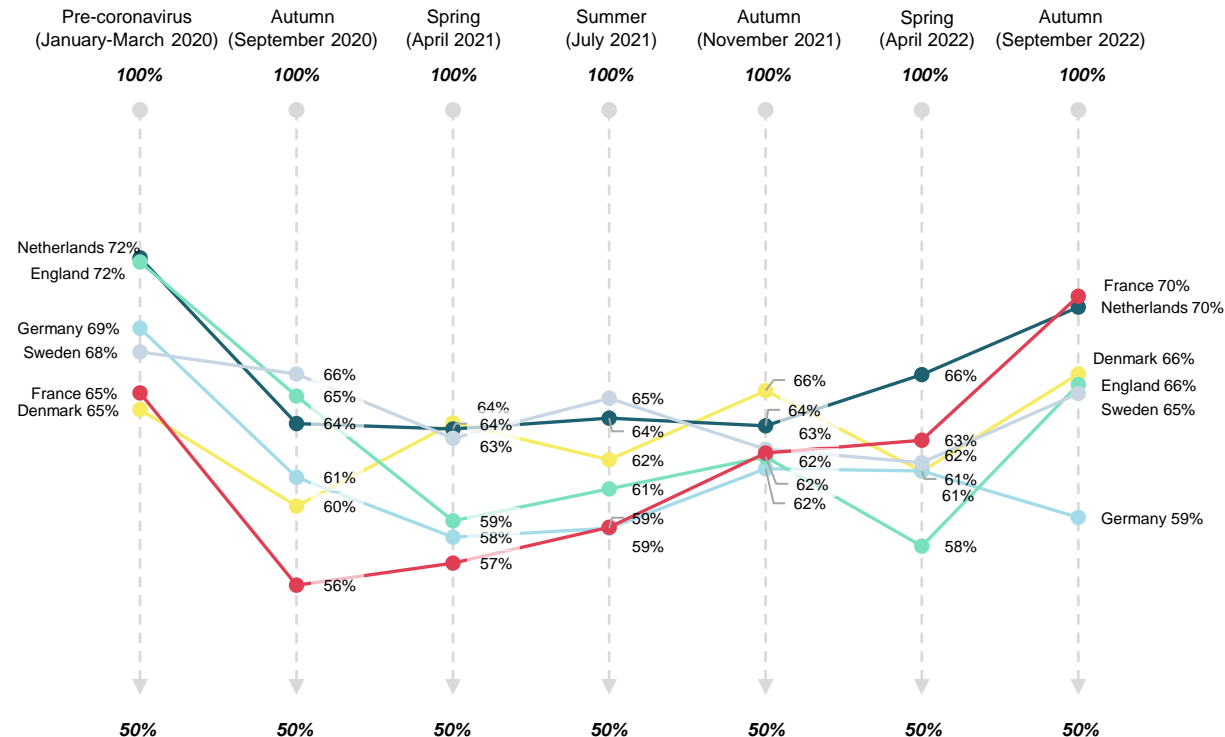
Pre-coronavirus potential tourists: People who have been on holiday or travelled abroad for leisure purposes in the past 3 years.

Post-coronavirus 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.



Entire population

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



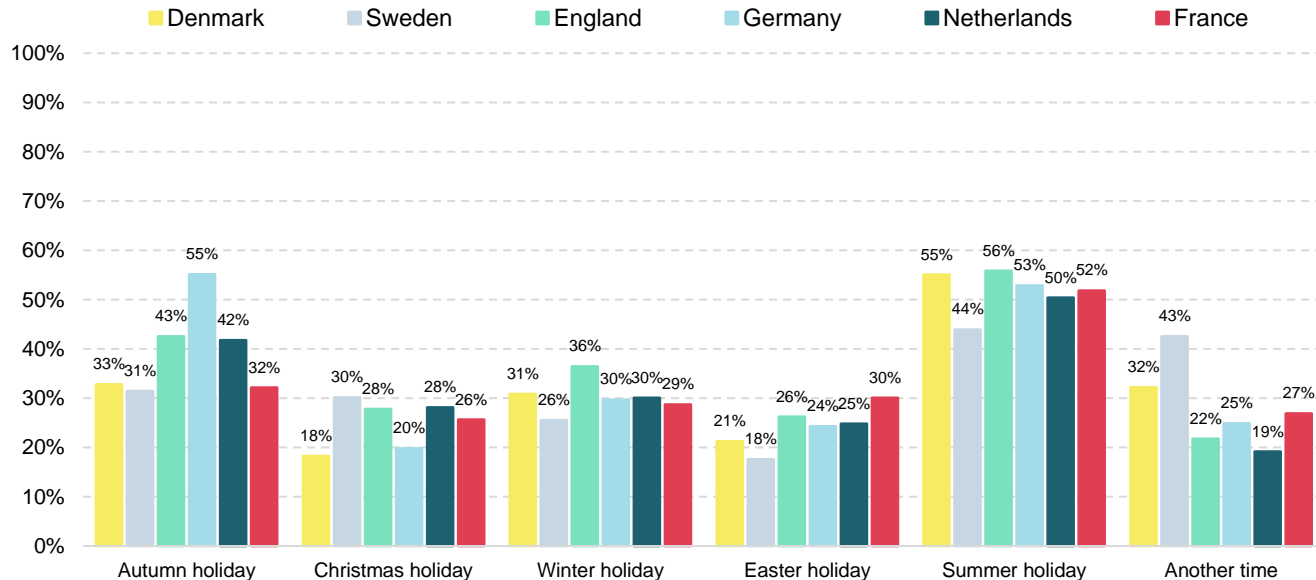
Many are wanting to travel as early as this autumn and winter

- The desire to travel is still high and many people, especially in Germany, are looking to take a holiday abroad as early as this autumn.
- Many people are expecting to or are considering going abroad this winter. Summer holidays are not quite as dominant now as they were during the spring. This is probably because many people have a shorter planning perspective when times are turbulent.



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

When do you expect to travel abroad on holiday? You can select several alternatives.
Percentage of people interested in travelling abroad.



Price increases on travel are currently having the greatest impact on people's travel choices

Looking at the statements on the right, 62 per cent of respondents said that one or more of the factors in the graph were affecting their travel choices over the next 12 months to a "very high degree".

Travellers are slightly more worried now than they were before the summer in all areas with the exception of developments in the war in Ukraine.

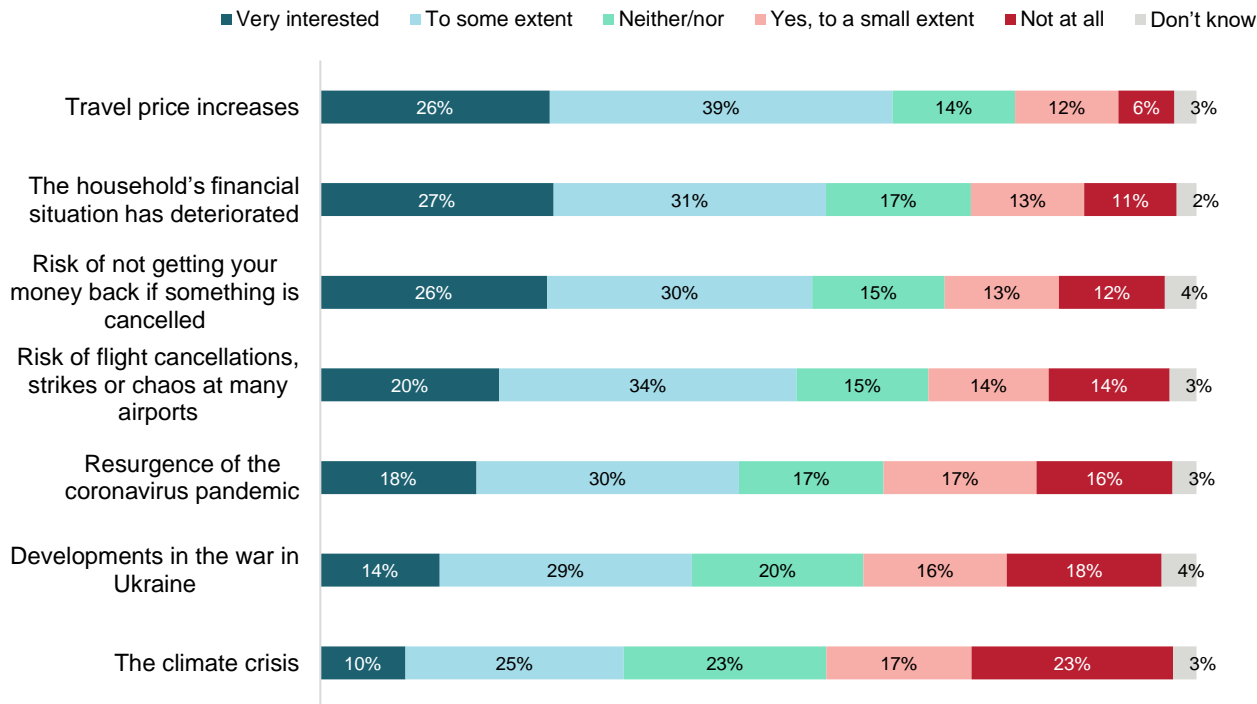
NB: This survey was conducted between 13 September and 21 September and therefore does not include developments during the past month.



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

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

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



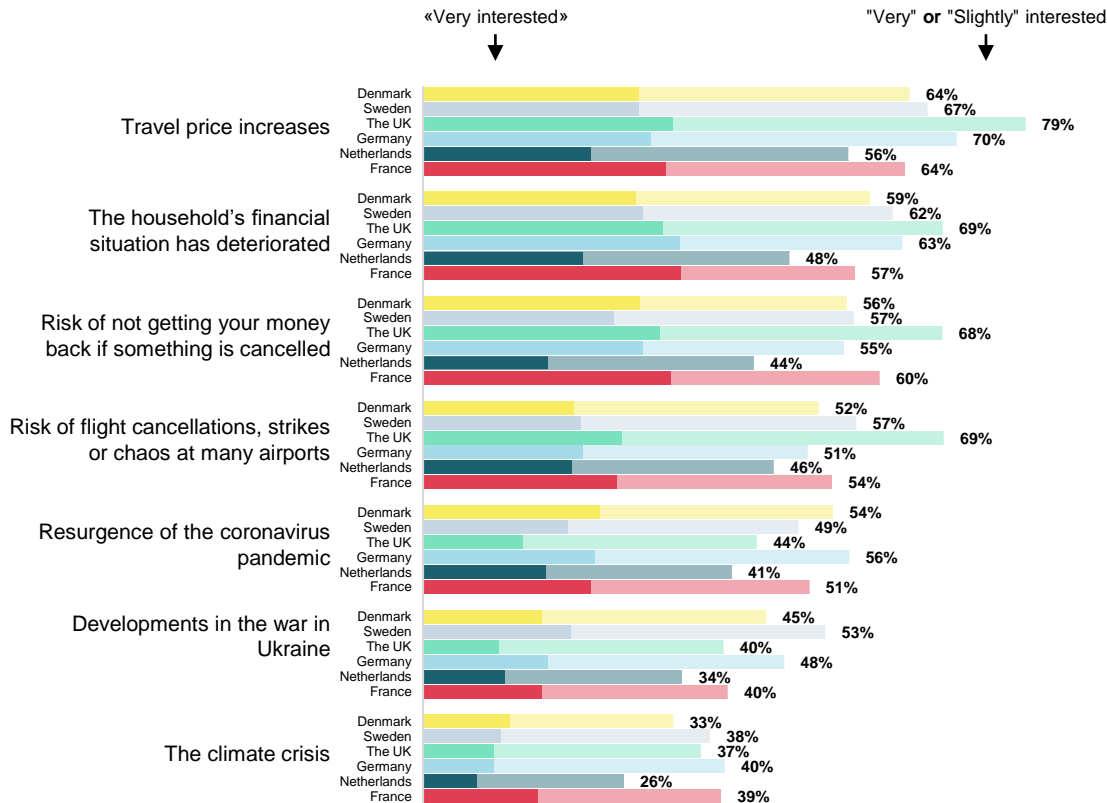
Price increases are affecting people's travel choices and plans

- Concerns about price increases and household finances are having the greatest impact on travellers.
- Inflation is having the greatest impact in the UK and Germany in particular. Interest in travelling is waning in Germany.



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

To what extent do you expect the following to affect your travel choices over the next 12 months?
Percentage of those who are very «very» or «slightly» interested in travelling abroad during the next 3 years.



Travellers are wanting to choose cheaper destinations and spend less money on their holidays

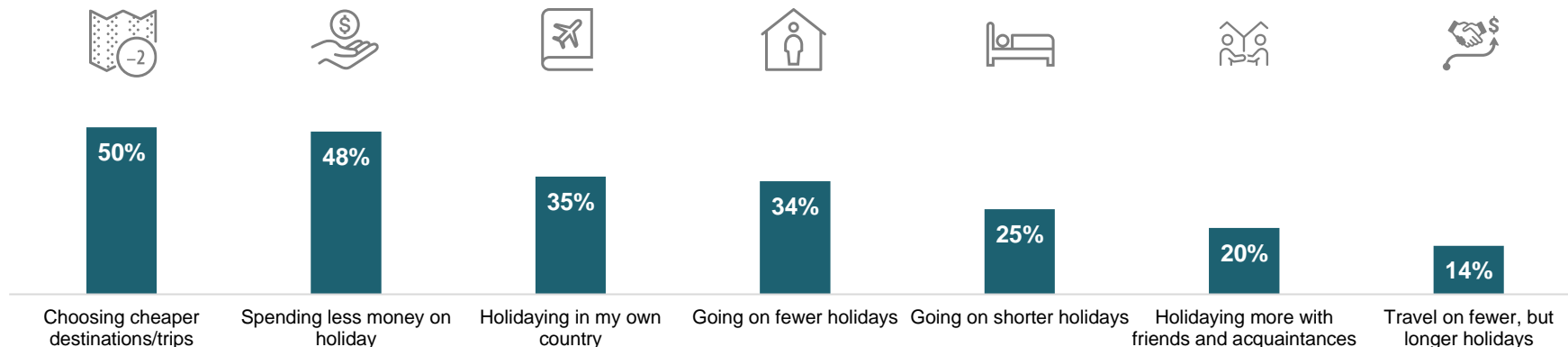
Travellers will choose cheaper destinations and spend less money on holidays than before due to price increases and the economic downturn. This is probably an important explanation as to why interest in Norway over the next 12 months and especially over the next 3 years has dropped significantly in this survey. Expensive and cold is probably not a competitive advantage when coupled with high inflation and high energy prices.



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

* and who have said that their financial situation would affect their travel plans (i.e. price increases on travel, their household finances or the risk of not getting their money back if something was cancelled.)

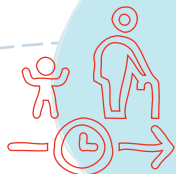
How will the economy affect your travel choices? Average across markets.



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



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



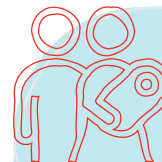
Primarily **people over the age of 50**, – those under 40 are most affected



People with **the highest incomes** are **least affected**



Men are less likely to think that they are affected



Families with children are more affected

– Danish and English families with children in particular are affected by a downturn in their finances

Norway is still best known for its magnificent scenery, fjords and mountains

There has been a decline in all the hallmarks signifying beautiful landscapes in those surveys that were carried out before the pandemic and up until the present day.

Far more people agree or strongly agree that Norway is characterised by good culinary experiences and local specialties and that progress has also been made in respect of the locals (in Norway) being accommodating.



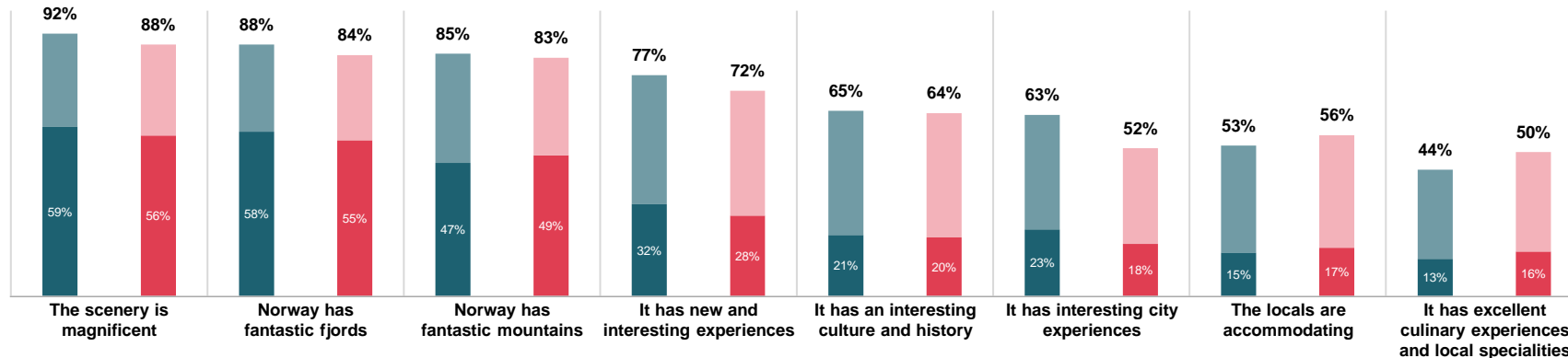
*This page looks at people who are **interested in travelling abroad during the next 3 years***

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

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

Dark colours and white percentages = "Strongly agree"

Black percentages = "Strongly agree" + "Agree"



Young people are less likely to think that Norway is characterised by magnificent scenery and fantastic fjords and mountains

It is not easy to know if young people are less aware of and have less knowledge about Norway's magnificent scenery or if they simply experience it as being less impressive than older people. The survey contains no doubts that young people are far less likely than older people to agree or strongly agree – across all markets – that Norway is characterised by magnificent scenery and fantastic fjords and mountains.

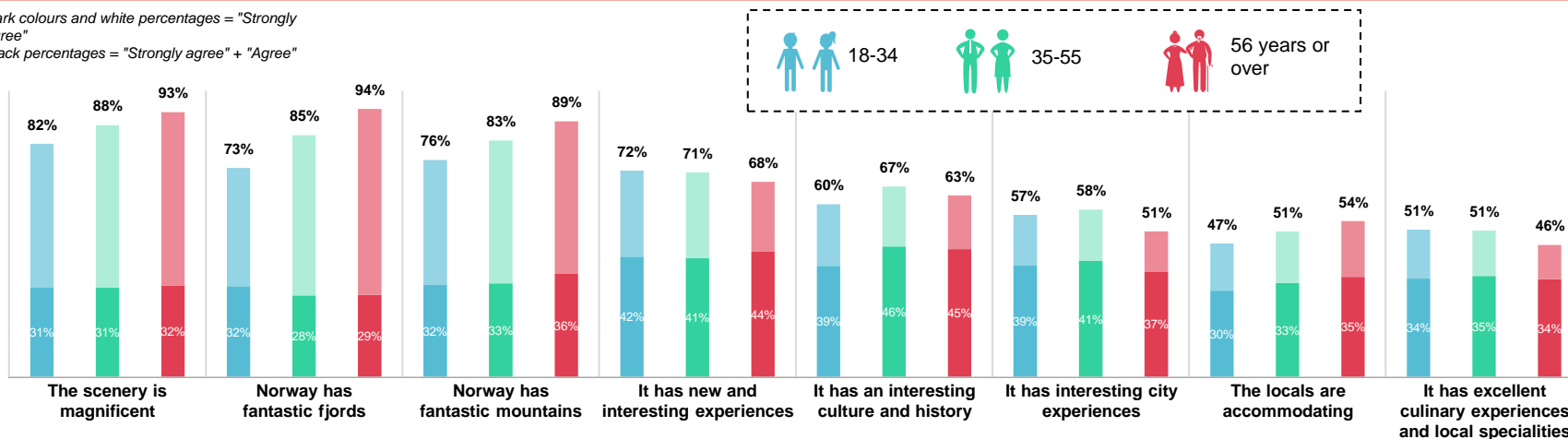


This page looks at people who are **interested in travelling abroad during the next 3 years**

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Black percentages = "Strongly agree" + "Agree"



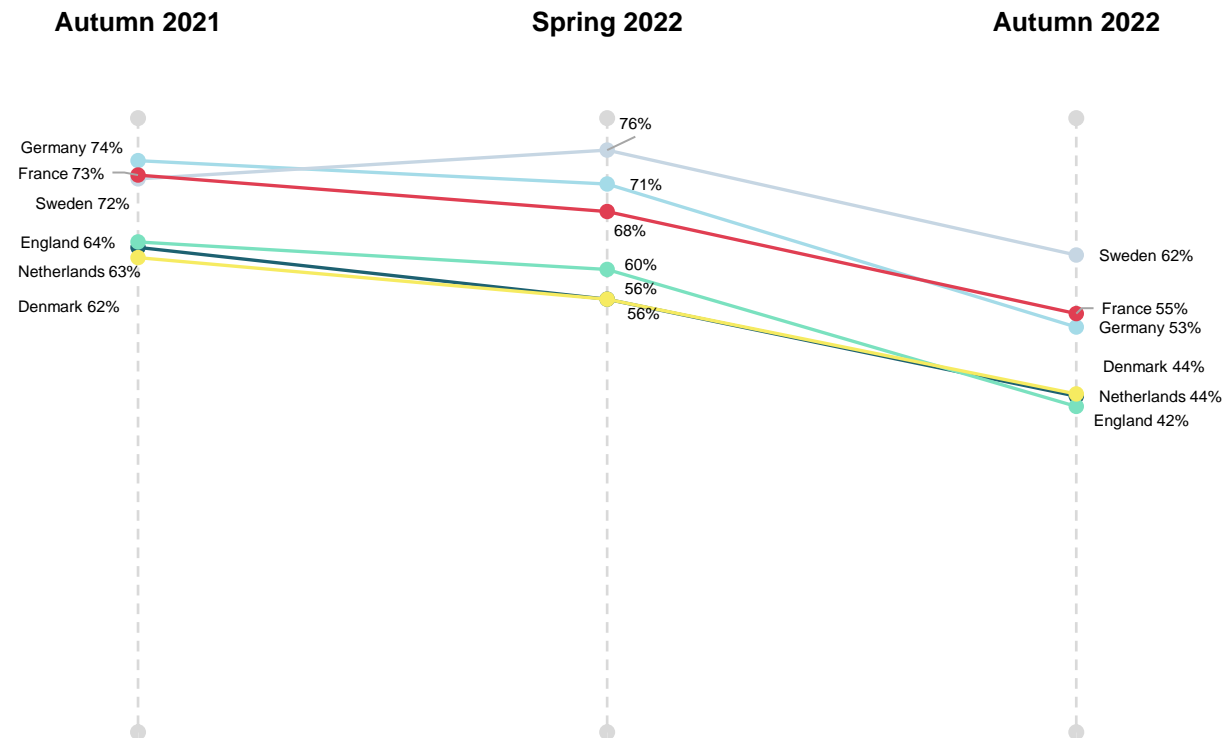
Fewer people are interested in traveling to Norway during the next 3 years

The percentage of the population interested in travelling to Norway during the next 3 years is falling in all countries compared to the surveys conducted in April and the autumn of 2021.



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

Development in the percentage of the target group interested in travelling to Norway over the next three years
Percentage of people interested in travelling abroad during the next 3 years.



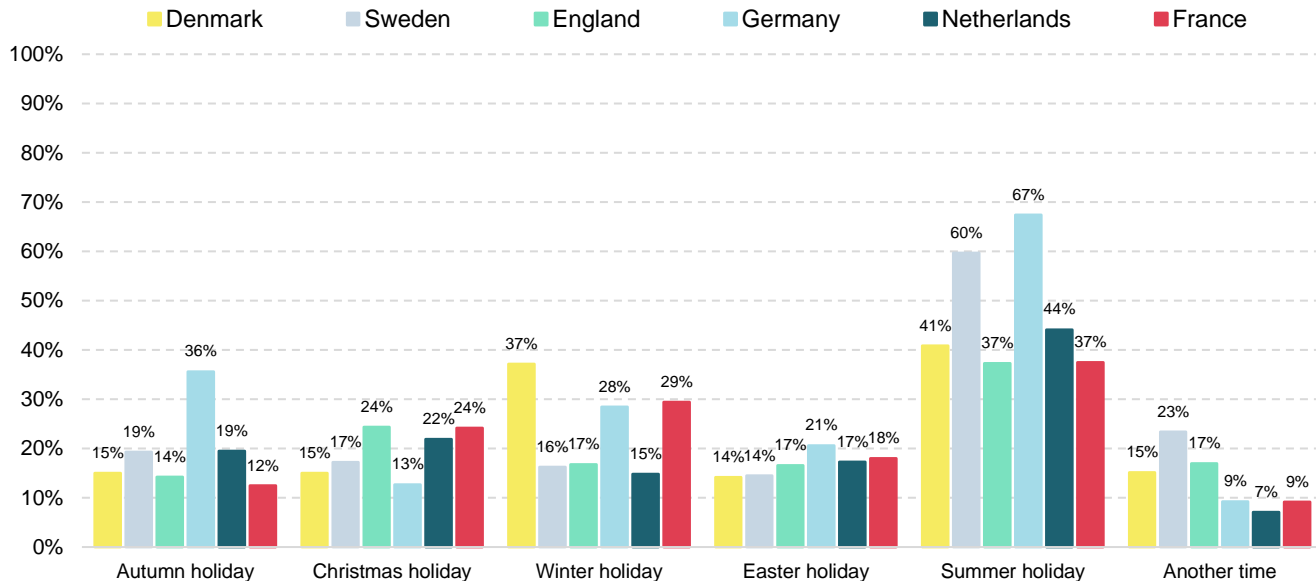
The travel boom may be lower than expected this summer

- Winter holidays in Norway are most attractive in Denmark, but the French, Germans and English would also like to go to Norway during the winter. Seeing the Northern Lights tops the list of experiences that travellers would like to have on a Norwegian holiday.



People who would like to go on holiday to Norway during the next 3 years

When are you thinking about going on holiday to Norway during the next 3 years? You can select several option.
Percentage of people interested in travelling to Norway during the next 3 years.



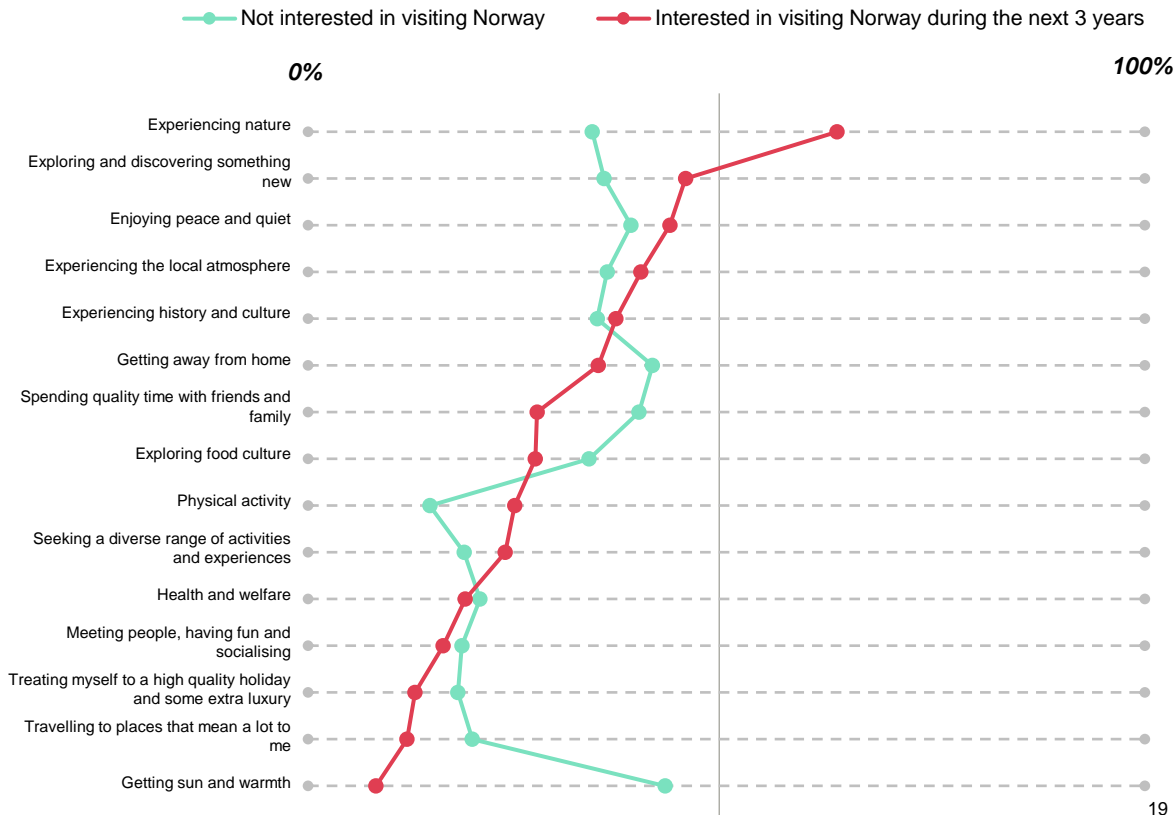
Want to experience nature when holidaying in Norway

- People who are interested in travelling to Norway want to experience nature on such a holiday. People who are interested in Norway stand out clearly in this respect.
- This applies across all markets and age groups
- A new feature of this survey is that those people who have said that they are interested in Norway have been asked specifically about holidaying in Norway. Previously this question has been formulated in general terms about holidaying abroad.



*This page looks at people who are **interested in travelling abroad during 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



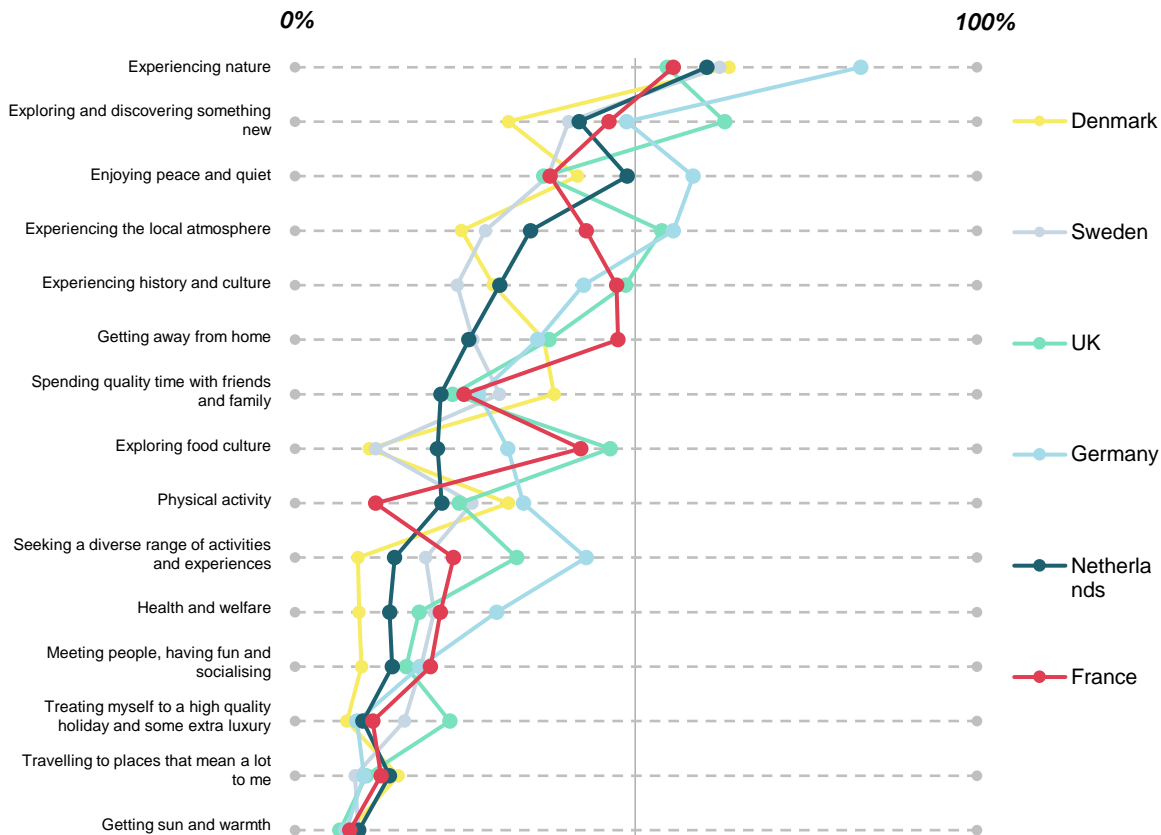
Peace, exploration and physical activity set Norway apart from other destinations

- Nature experiences reign supreme as something everyone wants to have on a holiday in Norway. At the same time, they are far more interested in physical activity, exploring and discovering something new than travellers not interested in visiting Norway.
- In Germany, Denmark and the Netherlands, peace and quiet are much more important among those interested in Norway than elsewhere.
- History and culture are important in France and England, but these are not experiences where those interested in Norway differ most from other travellers.



People interested in travelling on holiday to Norway during the next 3 years

Which of these experiences are a must when you go on holiday to Norway?
Percentage of people interested in travelling to Norway during the next 3 years



Interest in Norway highest among those with high incomes

- Interest in Norway has fallen in all markets and among all income groups, but it has fallen least among those with the highest incomes. Consequently a higher percentage of those people who are interested in visiting us have higher incomes in this survey.
- Percentage of those interested in travelling abroad during the next three years:
- High income: 69% during the spring and 59% during the autumn.
- Average income: 66% during the spring and 55% during the autumn.
- Low income 64% during the spring and 50% during the autumn

People interested in travelling on holiday to Norway during the next 3 years

Income level of people interested in traveling to Norway during the next three years .Average across markets



The majority want to take responsibility for nature, the environment and the climate when travelling

- The heat wave this summer did not cause an increase in those people wanting to take responsibility for nature, the climate and the environment, but price increases, war and unrest have not caused a drop in this percentage either.
- In those markets where we conduct our Travel Barometer, the Danes always come out at the bottom in respect of this issue. Their responses are fully in line with the Norwegian responses when we pose the same question here in Norway.

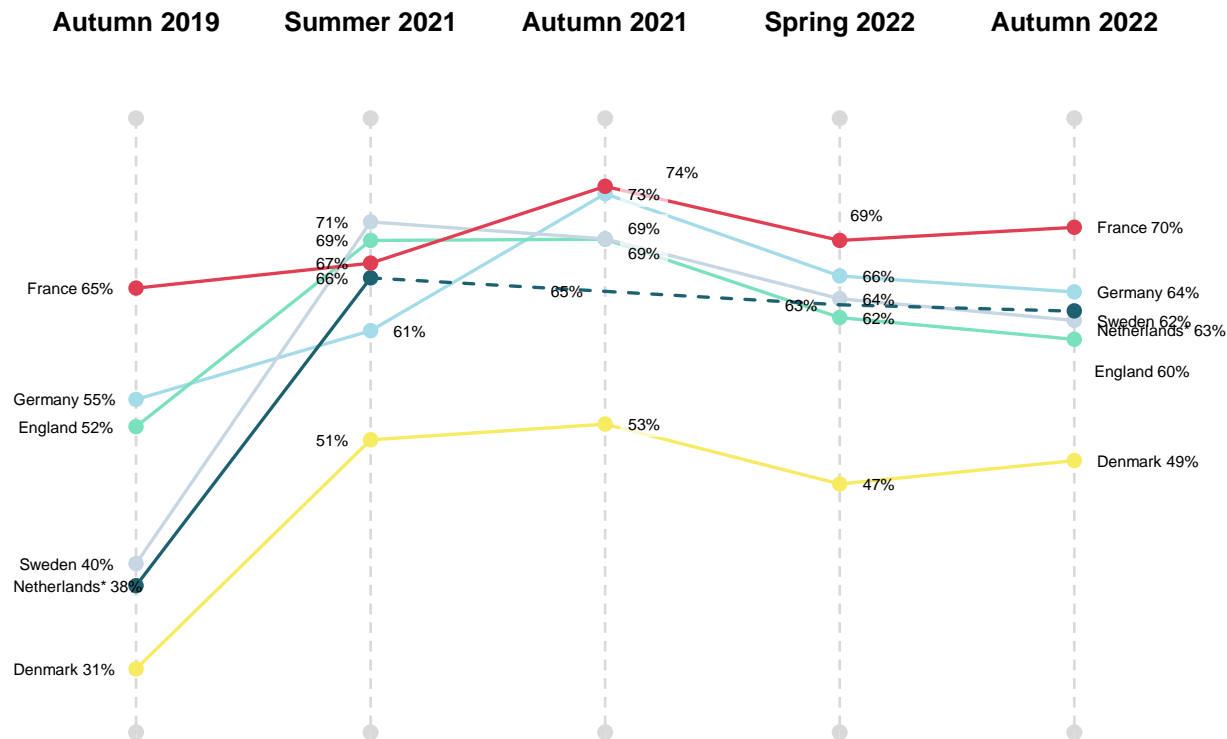


This page looks at people who are **interested in travelling abroad during the next 3 years**

To what extent do you agree or disagree with the following statement:

I am interested in fulfilling my responsibility to ensure that the way I travel does not have a negative impact on the environment or 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.

More people want to fly less

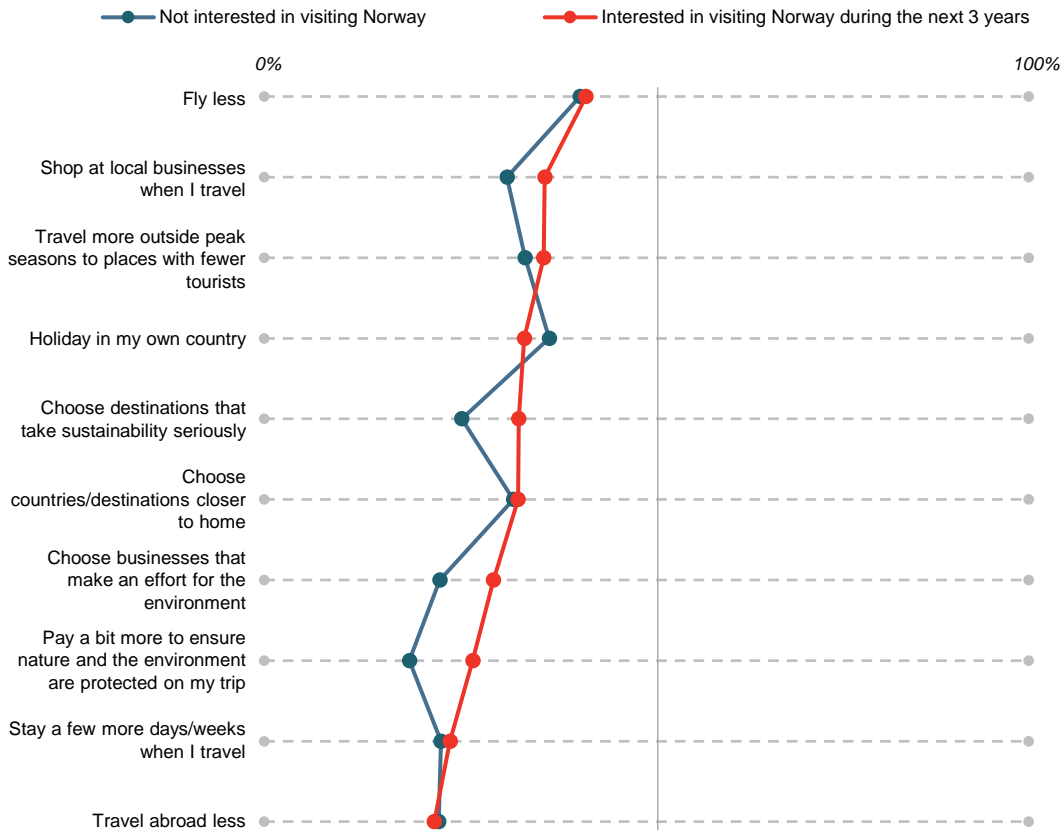
- It is older people, people with the highest incomes and students who are most keen to fly less.
- Women are more willing to travel more in their own country, shop locally and travel outside peak seasons.
- People with children living at home are less willing to change their behaviour than those without children living at home.



*This page looks at people who are **interested in travelling abroad during 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?

Percentage of active travellers. Average across markets.



More people want to stay longer when they travel

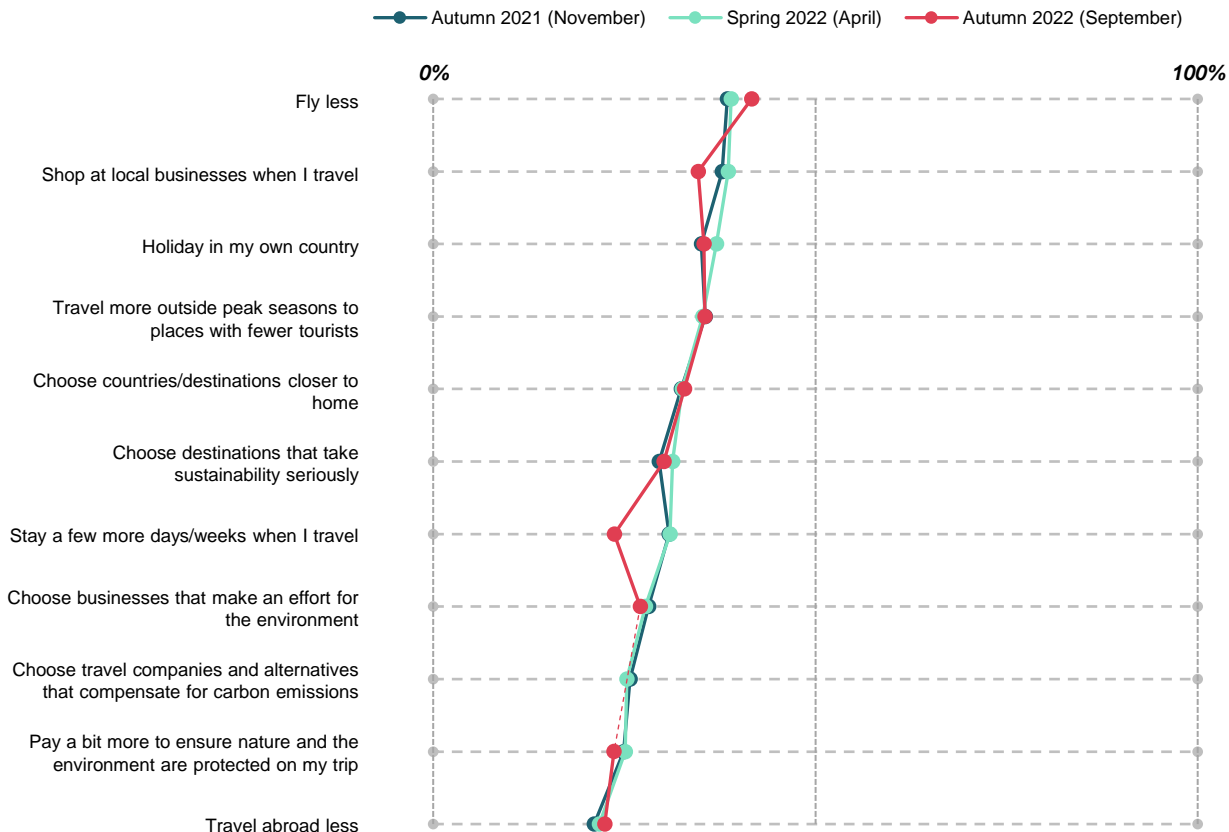
- There are only minor differences relating to the measures that travellers are willing to take in order to prevent the way in which they travel from having a negative impact on nature and the climate.
- There are fewer people interested in longer stays and this is probably connected to the fact that travellers are wanting to spend less money and to take shorter holidays as a result of the economic situation.



*This page looks at people who are **interested in travelling abroad in the next 3 years** and **who want to take responsibility for ensuring that the way they travel does not have a negative impact on nature, the climate and the environment***

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 percentage of those who are interested in travelling abroad during the next 3 years and who want to take responsibility for ensuring that the way they travel does not have a negative impact on the environment, climate and nature. Average across markets.



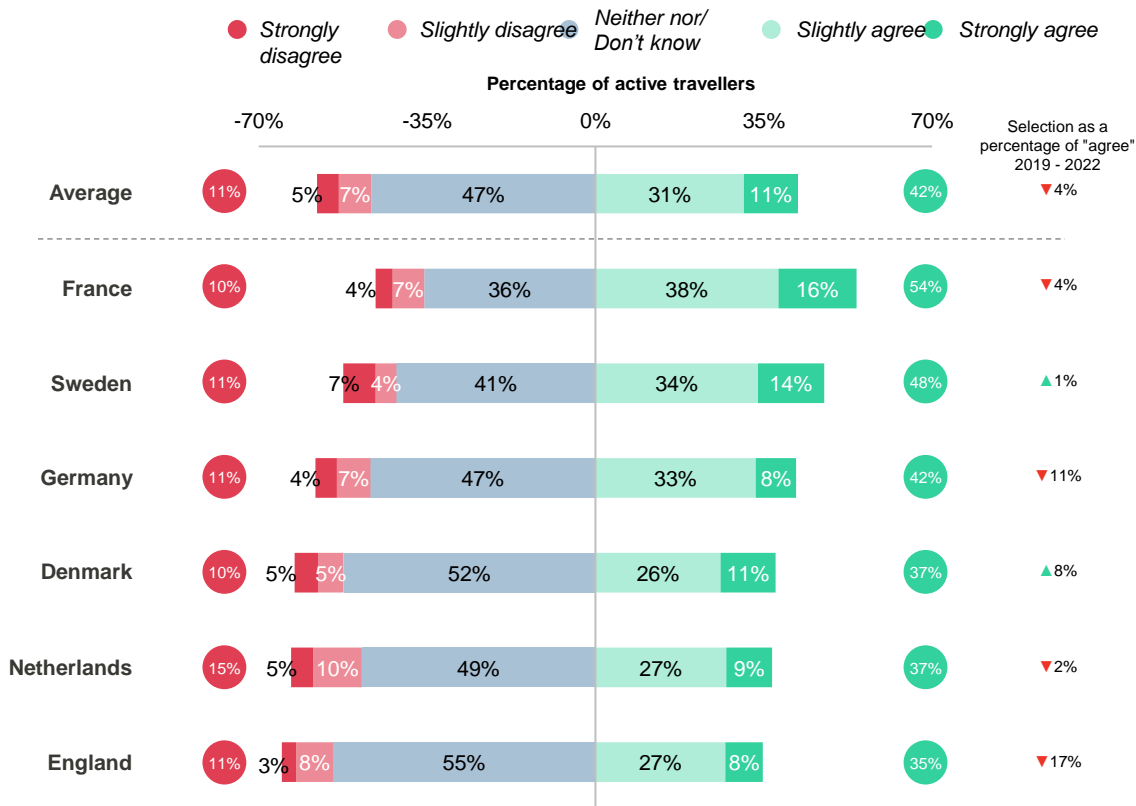
Travelling to Norway is a sustainable choice for many people

- A trip to Norway is perceived as being a more sustainable choice now than before the pandemic in Sweden and Denmark.
- Those who are interested in Norway believe to a much greater extent that Norway is a sustainable choice than those who are not interested in traveling to Norway.
- Young people, families with children and men also perceive to a greater extent that travelling to Norway is a sustainable choice.



This page looks at people who are **interested in travelling abroad during 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 percentage stating that they would like to purchase a package holiday when visiting Norway has been stable. This is slightly lower among those wishing to travel to Norway during the next 12 months.
- The percentage is highest among families with children and those under the age of 35.



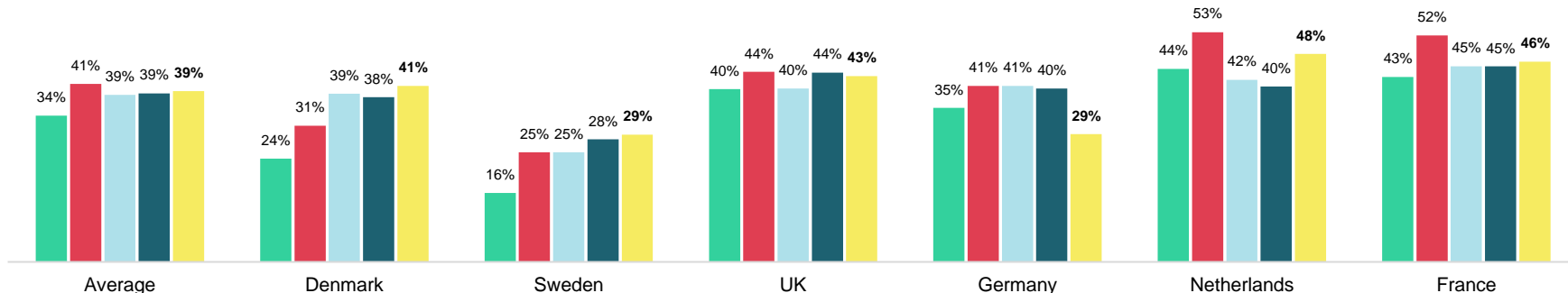
People interested in travelling on holiday to Norway during the next 3 years

You have said that you would like to holiday in Norway during 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)"

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

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



Destinations during the next 12 months

Norway slightly less popular in the majority of markets

Norway's rankings over time:

DK: #7 during summer '21 → #9 → during autumn '21 → #9 during spring '22 #10 Now

SV: #6 during summer '21 → #9 during autumn → '21 #10 → during spring '22 #11 Now

EN: #17 during summer → '21 #14 → during autumn '21 → #18 during spring '22 #27 Now

DE: #16 during summer → '21 #13 → during autumn '21 → #12 during spring '22 #15 Now

NL: #15 during summer '21 → #12 d→ uring autumn '21 → #16 during spring '22 #13 Now

FR: #14 during summer → '21 #9 → during autumn '21 → #1 → 9 during spring '22 #20 Now



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

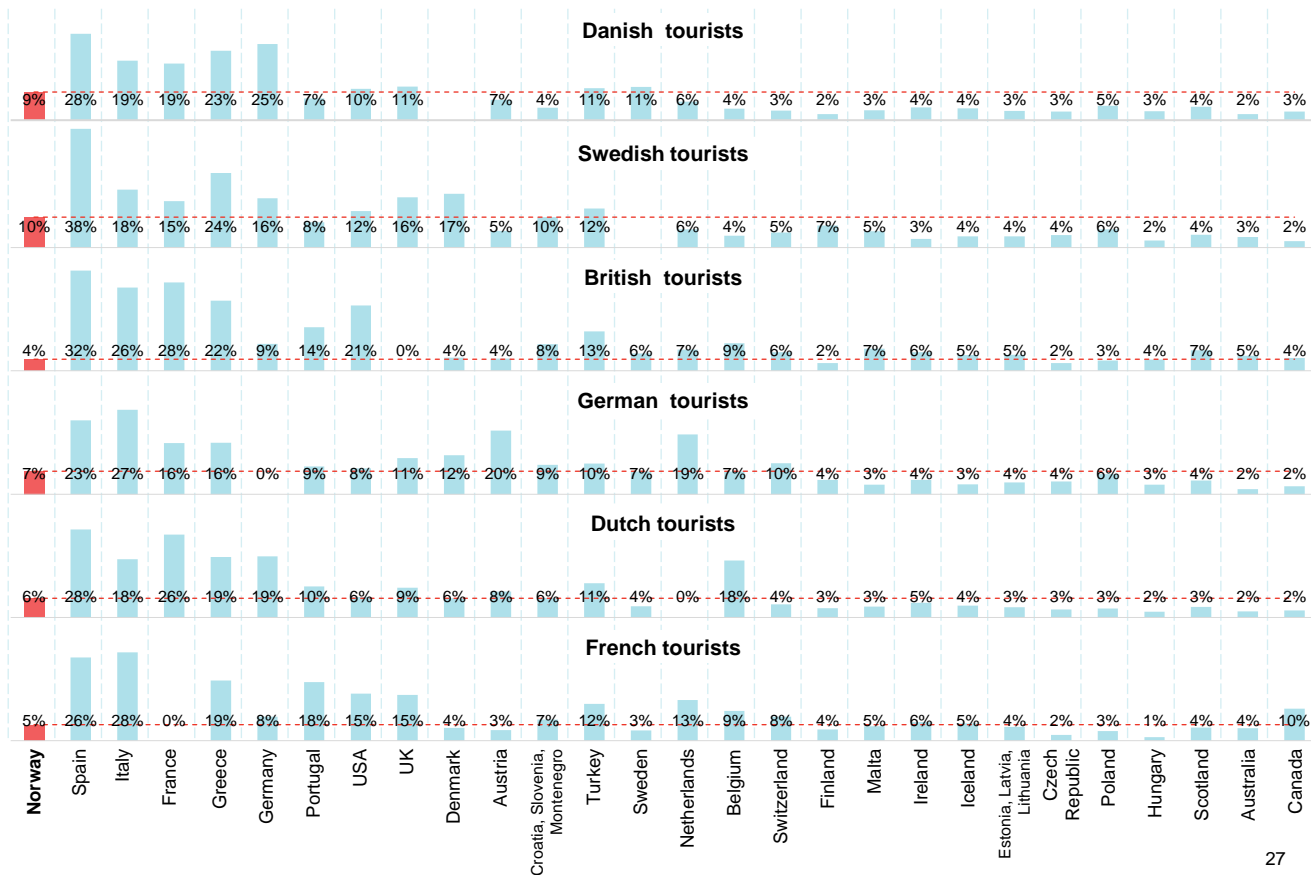


Innovasjon Norge

Epinion

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

The percentages indicate the percentage of those interested in travelling abroad during the next 12 months



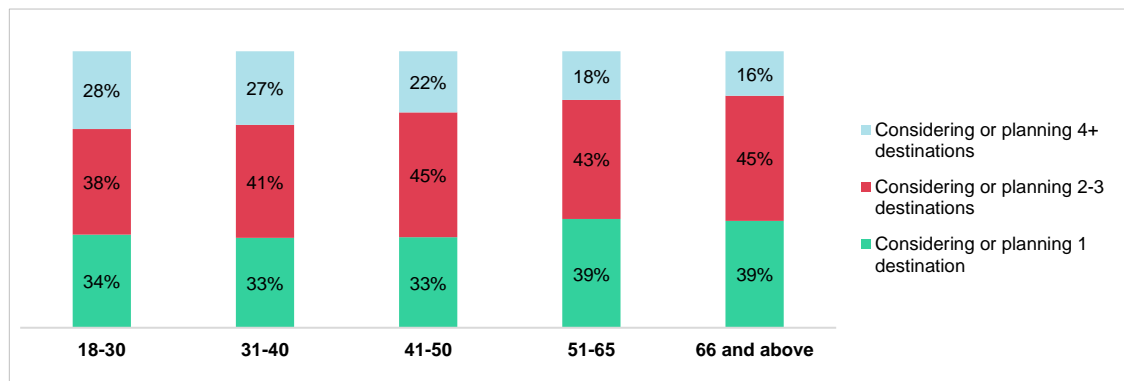
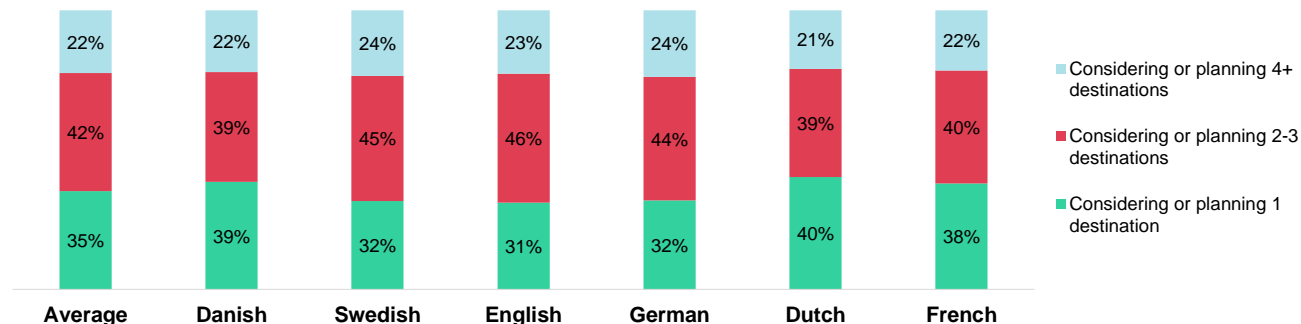
Travellers considering fewer destinations

In those markets where this survey was conducted, those wishing to travel are considering fewer destinations than in previous surveys. In our last survey, 21 per cent were considering just one destination – this has now increased to 35 per cent.

This may be related to the fact that many people want to go on fewer holidays and spend less money when on holiday. At the same time, autumn is the low season for holidays, something which could also affect the respondents' answers.

Which countries are you thinking about or planning to visit on a holiday/leisure trip during the next 12 months?

The percentages indicate the percentage of those interested in travelling abroad during the next 12 months



People wishing to travel to Norway have many destinations on their wish list

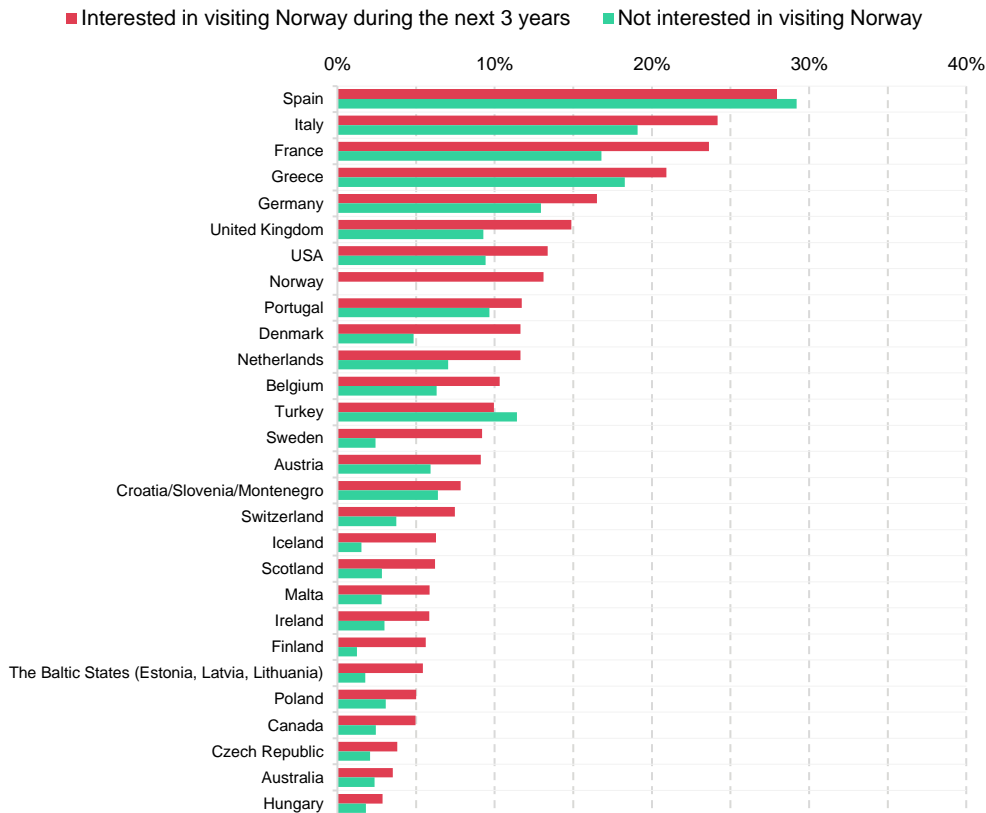
People wishing to travel abroad during the next 12 months and who are interested in travelling to Norway during the next 3 years are far more interested in travelling to all other countries, with the exception of Spain and Turkey.

There is little doubt that there will be a battle to attract these tourists in the future.



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

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



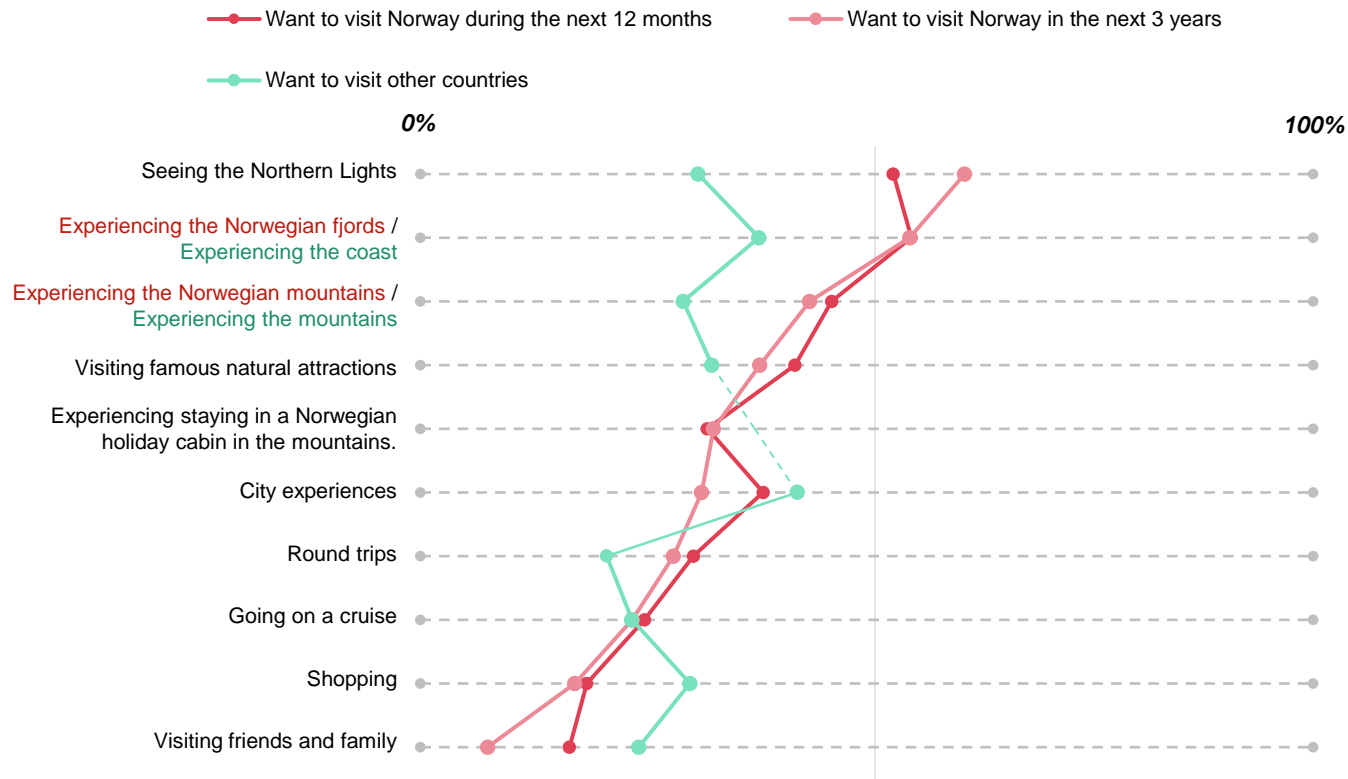
Fjords and mountains for people ready to travel

- Nature experiences, the Northern Lights, fjords and mountains are most important for people wanting to travel to Norway during the next 12 months.
- The mountains are most important for the Danes and Swedes. The Northern Lights top the wish list for English people.

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

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

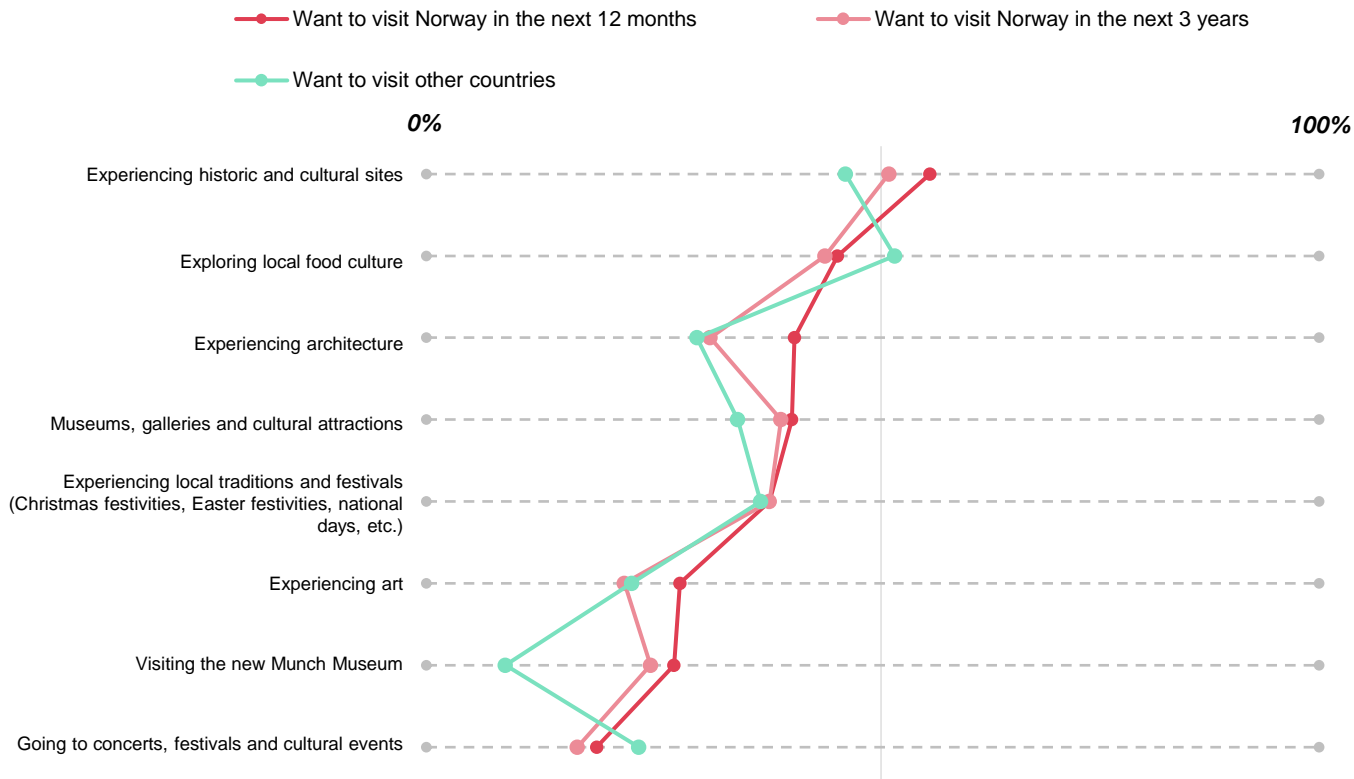


Many people want to experience culture and history in Norway

- Interest in culture and history in Norway is definitely most widespread in France and England.
- The Munch Museum is attractive in all markets

What type of experiences will you seek out on your next holiday abroad / in Norway?

These percentages indicate the average percentage of people who state that they will seek out these activities/experiences across the markets



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

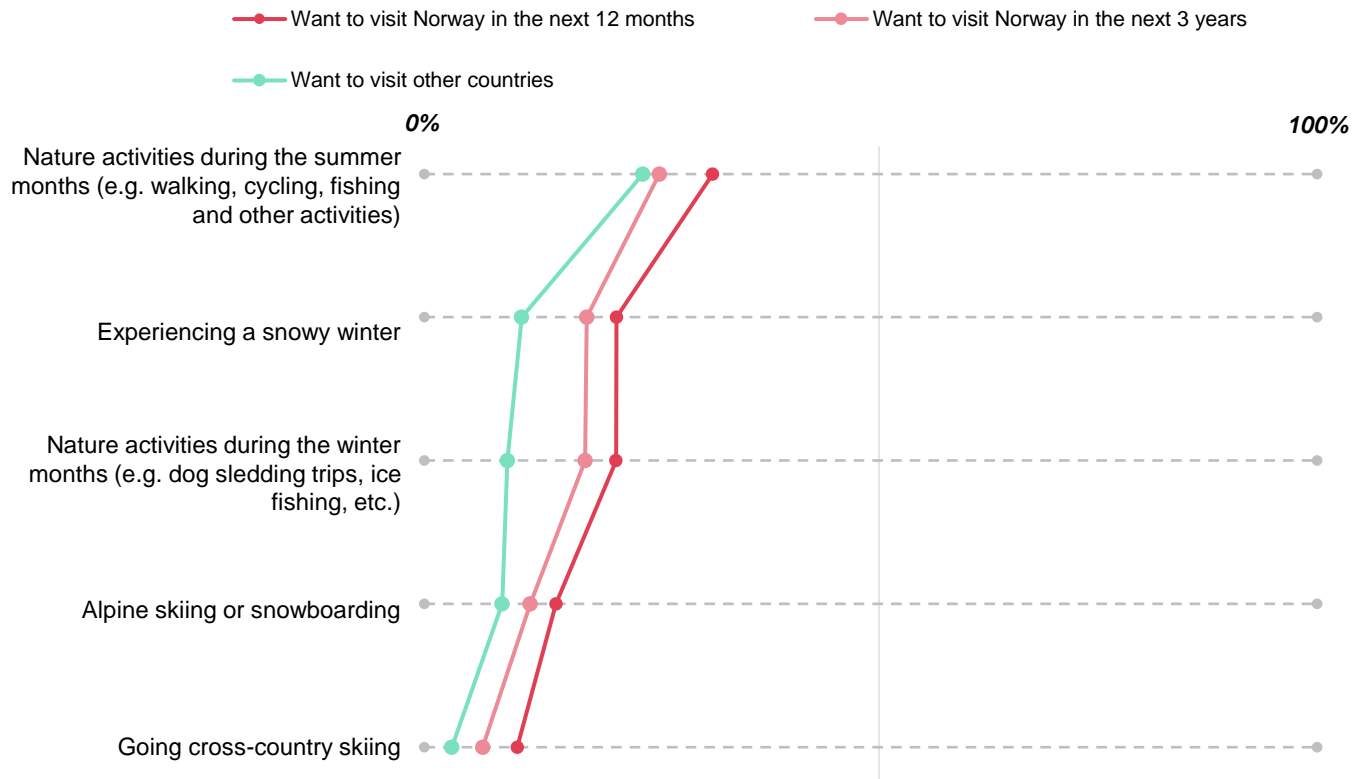
A high percentage of people are interested in being physically active, especially during the summer

- The interest in alpine skiing is highest in Denmark and Sweden, while the French are far more interested in other outdoor activities in the winter.
- The interest in outdoor activities in the summer is high in all markets, but lowest in Denmark and England.

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

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



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