

# Travel Barometer

## Autumn 2023

Survey conducted in the United Kingdom, Germany, Sweden, Denmark, the Netherlands and France in September 2023



Epinion



# 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 travellers from Sweden, Denmark, Germany, the Netherlands, the UK and France are adapting and prioritising at a time of significant uncertainty and challenge.

Before summer, the desire to travel was back at the same level as before the pandemic in most markets. Expectations have now declined somewhat. The economy and inflation are creating uncertainty, but extreme weather, war and the pandemic also affect the travel plans of a large proportion of travellers.

The report was produced by Gyger and Epinion in collaboration with Innovation Norway, and shows the most important results across the markets.

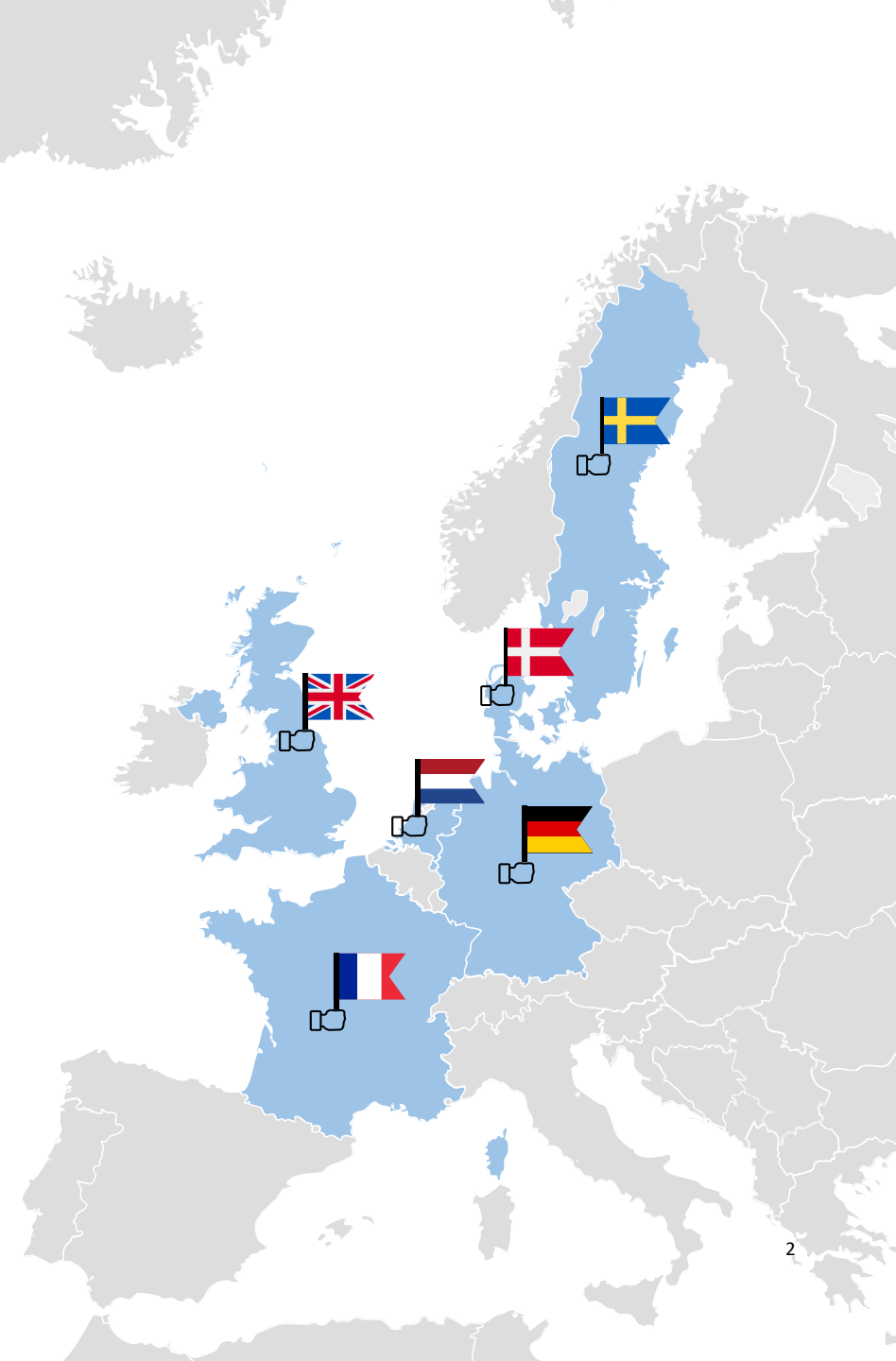
## Data and reader guide

Data collection was conducted from 15 September to 27 September. The analysis is based on interviews with 6229 potential travellers\* in Germany (999), France (1013), England (1018), the Netherlands (1092), Sweden (1036) and Denmark (1071).

The first topic of the report is the overall results, followed by an overview of the associations with and interest in Norway among those considering or planning to travel to Norway in the next 12 months or 3 years. The report has separate topics on the importance of sustainability and important target groups in the winter season.

### \* Target group surveyed:

The survey is based on interviews with potential travellers. These are defined as people who have been on at least one holiday and/or travelled abroad for leisure purposes in the past three years and who are interested in holidaying abroad in the next three years. The interviews were limited to certain geographical areas in England and France (see page 7 for more details).



## Summary of findings



Travel expectations remain at a high level, particularly in Sweden and Denmark. The proportion who want to travel abroad in the next 12 months remains high. In Germany, the proportion of people who want to travel abroad is significantly below the pre-pandemic level. At the beginning of 2020, **69 per cent** stated that they were interested in travelling abroad, but now the proportion is down to **57 per cent**.



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



Interest in Norway is **high**, especially in travel over the next 3 years. The share has increased in all markets, with the exception of Germany. In Germany, interest is stable despite the fact that the overall market has declined. This means that there is also increased interest in Norway in Germany. 4 per cent of those interested in Norway are considering visiting as early as in the next 12 months. Interest is highest in Sweden, where as much as 8 per cent are considering travelling to Norway in the coming year. 1 in 5 are interested in **experiencing a snowy winter**.



The risk of **extreme weather events** affects the travel plans of half of all travellers. In particular, the Swedes, Danes and English take weather risks into consideration when planning their holiday. The majority of travellers want to take responsibility for nature, environment and climate when they travel. Those considering Norway are more concerned about sustainability, and increasingly believe that **travelling to Norway is a sustainable choice**.

## 8 out of 10 adapt their travel plans to a greater or lesser extent to keep control of their budget, avoid extreme weather and reduce uncertainty



### The risk of extreme weather affects travel plans in all markets

#### What are we seeing?

Extreme weather is already affecting the travel choices of about half of travellers.



#### How is this affecting travellers?

The Danes, Swedes and English, as well as women and those under the age of 35 take the risk of extreme weather into account to the greatest extent when planning their holiday.



### 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 travellers?

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 travellers?

Women are more affected by tighter finances, inflation, war, extreme weather and the climate crisis than men, and adapt their travel choices to a much greater extent.



### Norway has strengthened its position in all markets

#### What are we seeing?

Norway is more attractive in all markets, especially in the somewhat longer term



#### How is this affecting travellers?

A vast majority of travellers in all markets are interested in travelling to Norway in the next 3 years. The challenge is to get more people to turn this interest into departure for Norway.

## Main findings

# Main findings per market

### England

The proportion who want to travel abroad in the next 12 months has increased by 10 percentage points from 48 to 58 per cent. Norway is much more popular now than at the start of last year's winter season. As many as 32 per cent of those interested in Norway are considering a winter holiday in Norway. It is just as popular for a summer holiday. The risk of extreme weather affects the holiday plans of 55 per cent of Britons, the highest of all markets.

### The Netherlands

The Dutch have travelled a lot in the last 3 years. They are less worried about the economy, extreme weather, climate, war and the pandemic than all other markets. The Dutch who are considering Norway, are interested in silence and tranquillity and spectacular nature experiences, no one is more interested in going on a tour of the country and they want to enjoy nature activities such as hiking, cycling and fishing on their Norwegian holiday. 1 in 3 have been here on holiday before.

### Germany

Only 57 per cent of Germans are interested in travelling abroad in the next 3 years. A significant decrease from 2019, which cannot be explained by the expansion of the geographical area. As many as 6 out of 10 are interested in travelling to Norway. Germans are concerned about sustainability, and there is a larger proportion in Germany who want to fly less, choose destinations that are closer and vacation in their home country than in any of the other markets.

### Denmark

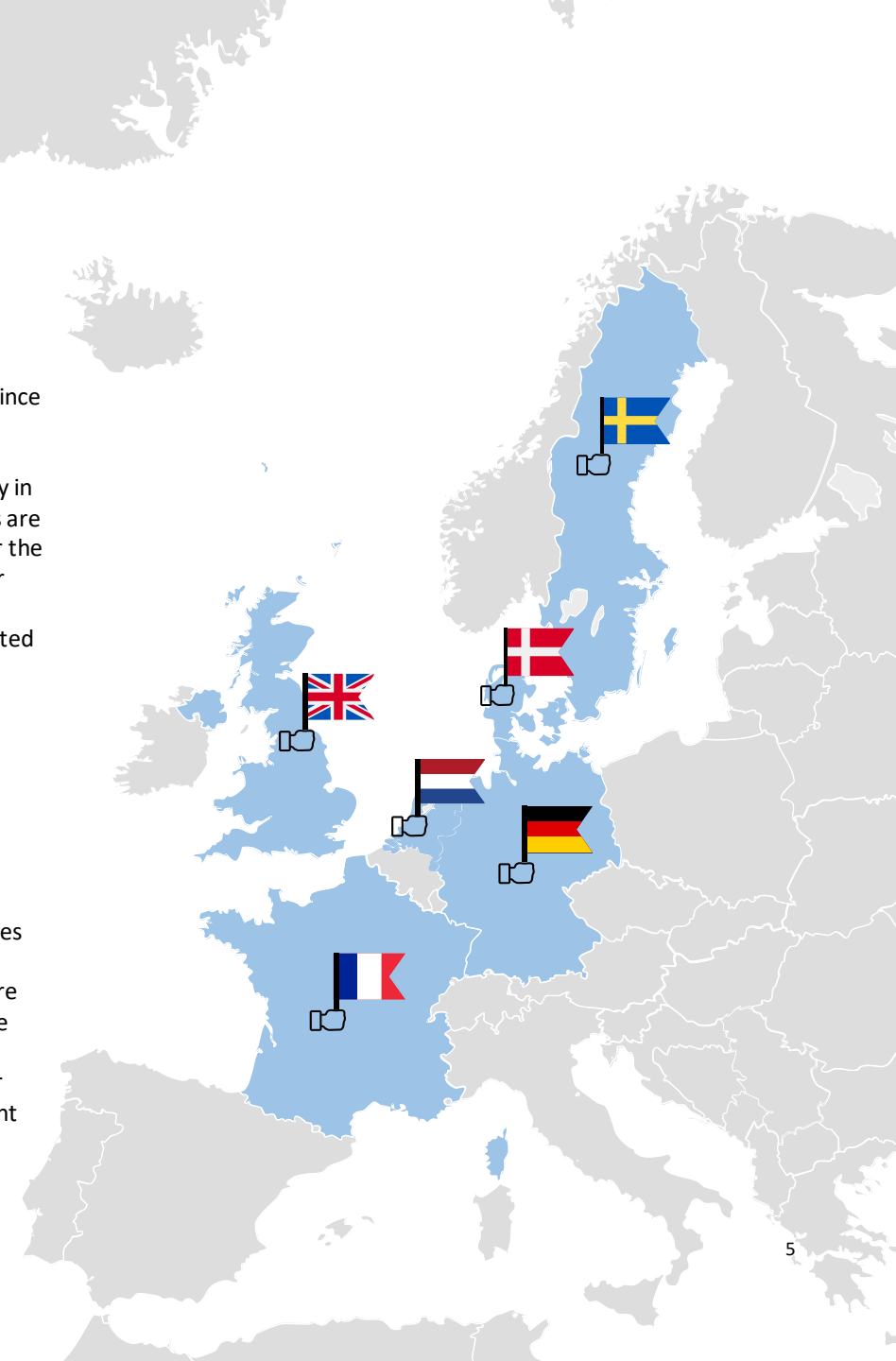
The enthusiasm for travel in Denmark is constantly reaching new heights. As much as 72 per cent are interested in holidaying abroad in the next 3 years. This is the highest of all markets and 7 percentage points higher than in the period just before the pandemic. The proportion considering Norway in the next 12 months remains high, with a record number (44%) considering Norway in the next 3 years. Danes who are considering Norway are significantly more concerned about sustainability and are more worried about the economy, climate, price rises and war.

### France

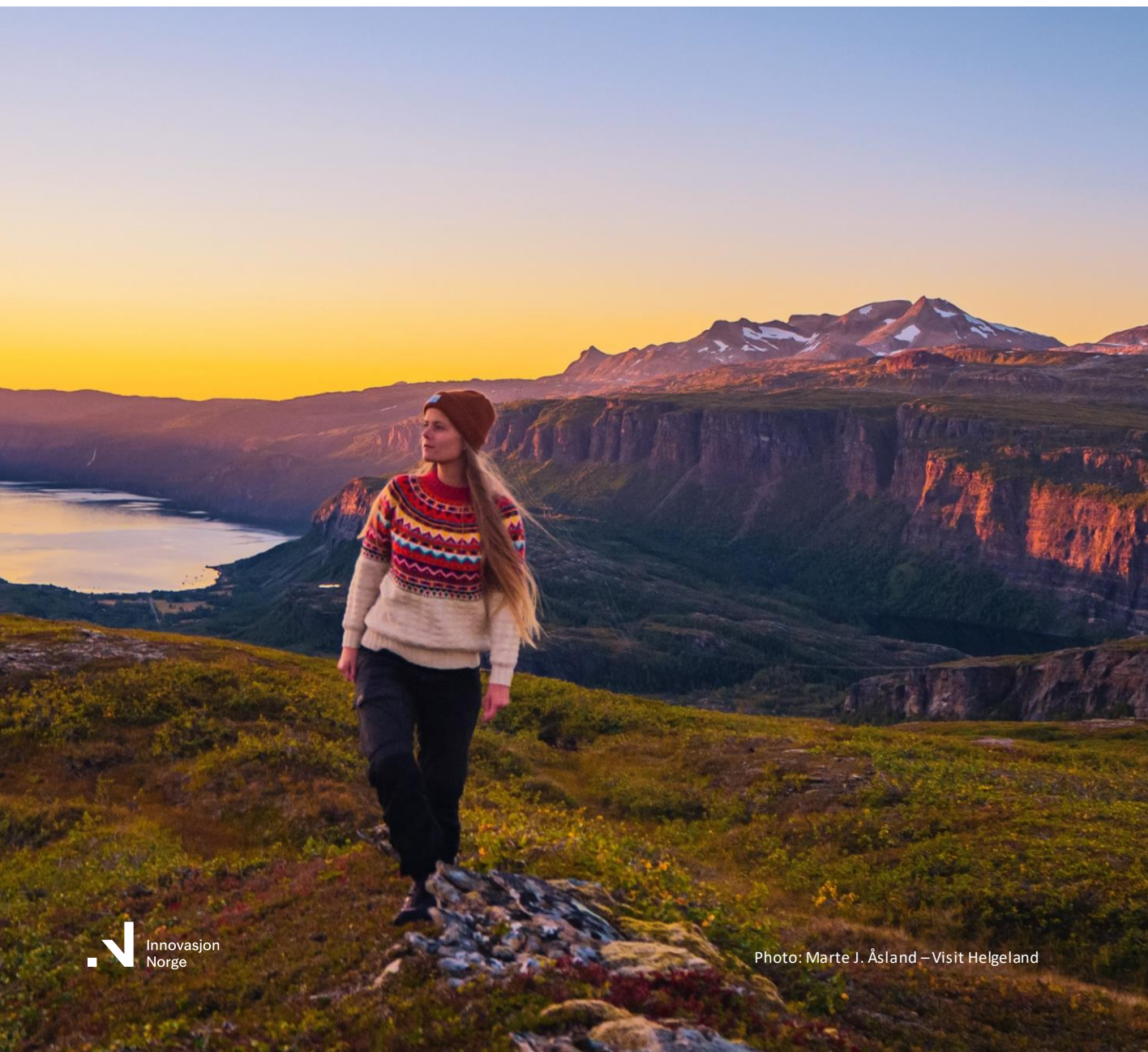
The desire to travel in France has fallen since the previous survey, partly because the geographical area of the survey has expanded. Fewer are considering Norway in the next 12 months. The Northern Lights are by far the most important experience for the French, and Christmas, winter and Easter holidays in Norway have broad appeal in France. Only 15 per cent of those interested in Norway have been here before. This is much lower than in all other markets.

### Sweden

A record number of Swedes (52%) are considering travelling to Norway in the next 3 years. Of these, 4 out of 10 have been to Norway in the last 6 years. Swedes who are interested in Norway are more worried about extreme weather and more concerned with taking care of nature, the environment and climate. Travelling to Norway is a sustainable choice for 71 per cent of these. While on holiday, they want to be physically active and experience silence and tranquillity. The summer holidays are definitely the time most people prefer to travel to Norway.





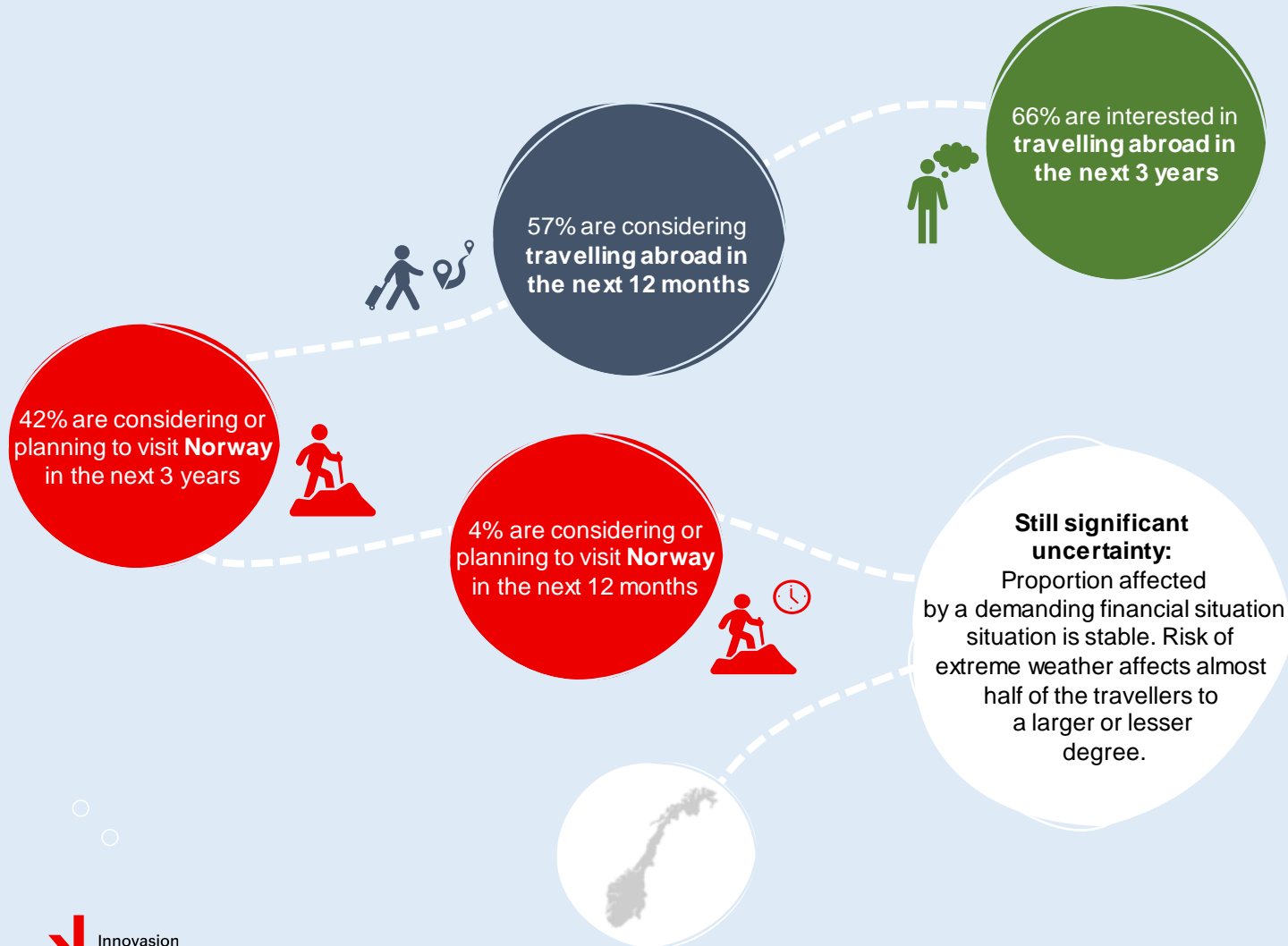


# Topic 1:

## **Future travel expectations**

How many people are expecting to holiday abroad in the next 12 months?  
How many are considering visiting Norway? What barriers to travel exist?

## Travel expectations are high despite unrest and uncertainty



There is an increase in the percentage of people interested in travelling to Norway during the next 3 years in all markets, with the exception of Germany. There are slightly fewer who are interested in travelling abroad, both in the next 3 years and 12 months, therefore the increased interest in Norway is especially gratifying.

The enthusiasm for travel in the coming year is strongest among those with high incomes, without children living at home who are not affected by the demanding economic situation or particularly concerned about sustainability. These have also travelled abroad the most in the previous three years.

The desire to travel in general and to Norway in particular

## The size of different target groups

- 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 geographical area of the survey has expanded in England, Germany and France since the last survey (see below). The expansion increases the proportion of active travellers (the target group) by 1 percentage point in Germany and decreases the proportion by 2 percentage points in France, while the proportion in the target group is virtually unchanged in England.
- Sections of the report take a closer look at the part of the target group that wants to travel abroad in the next 12 months (highlighted in blue on the right)
- The group considering travelling to Norway in the next 12 months and/or the next 3 years (highlighted in red) is of course an important target group in the report.

Areas in which interviews were conducted:

**Sweden, Denmark Germany and the Netherlands:** Covered nationally.

**England:** Bedfordshire and Hertfordshire, Berkshire, Buckinghamshire and Oxfordshire, Essex, Inner London, Outer London, Kent, Surrey, East and West Sussex as well as Cambridgeshire (**NEW**) (the area around London).

**France:** Occitanie, Nouvelle Aquitaine, Ile de France and Rhone-Alpes (Areas around Toulouse (**NEW**), Bordeaux (**NEW**), Paris and Lyon).

## 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)



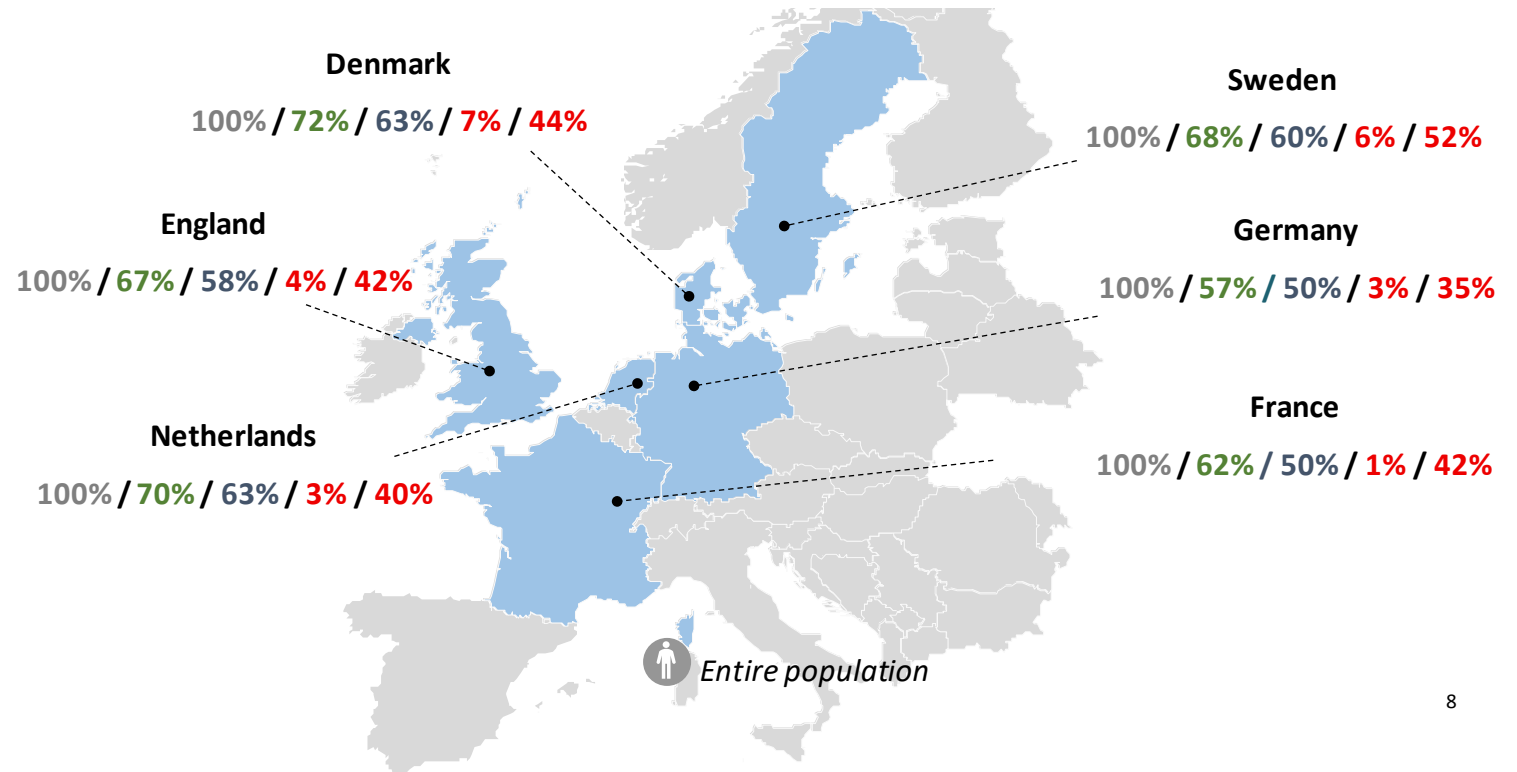
Those considering or planning to travel abroad in the next 12 months



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



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





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

## The proportion who want to travel abroad in the next 3 years is falling in Germany, France and England

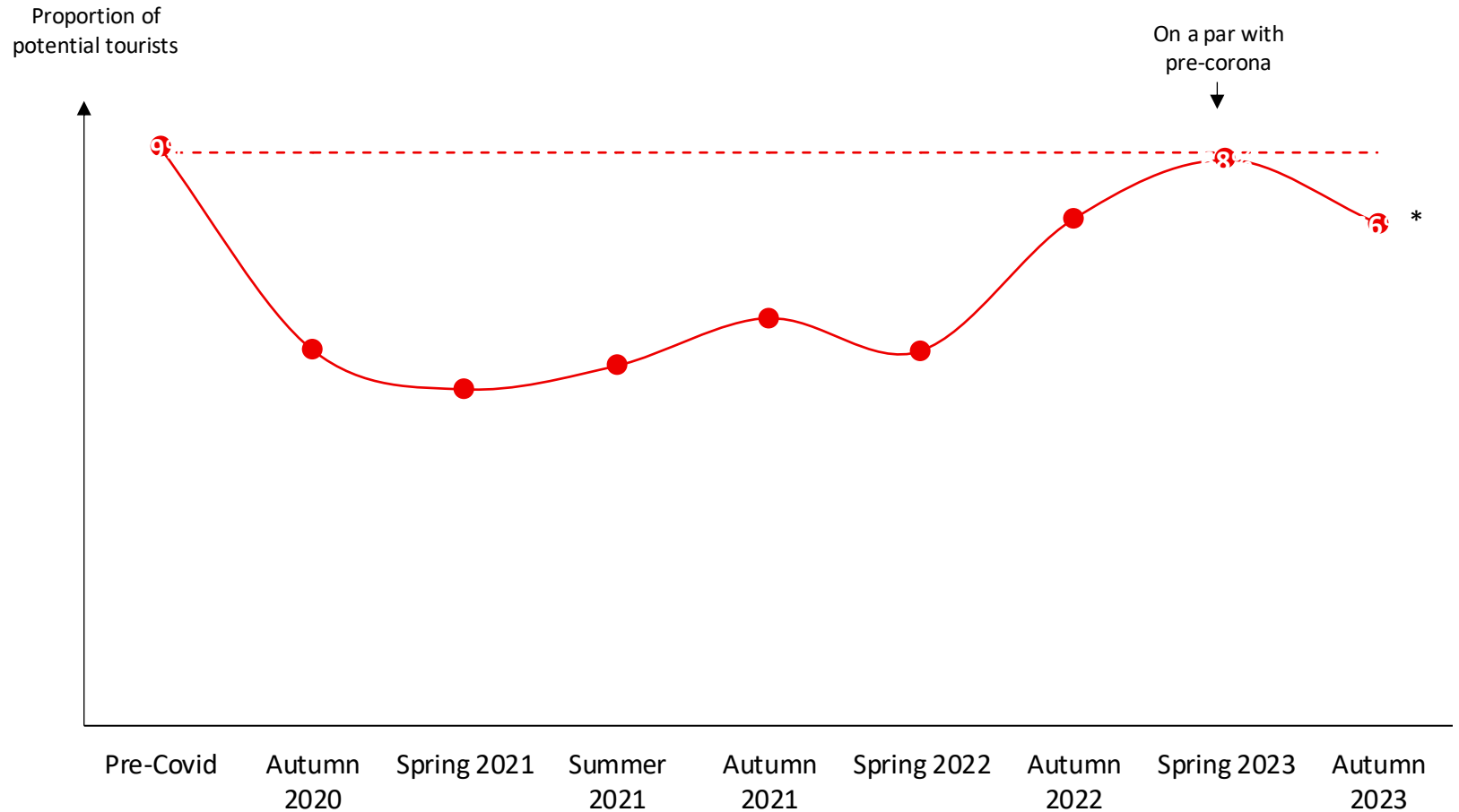
Overall, the proportion is at the same level as in autumn 2022.

### 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 three years.

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

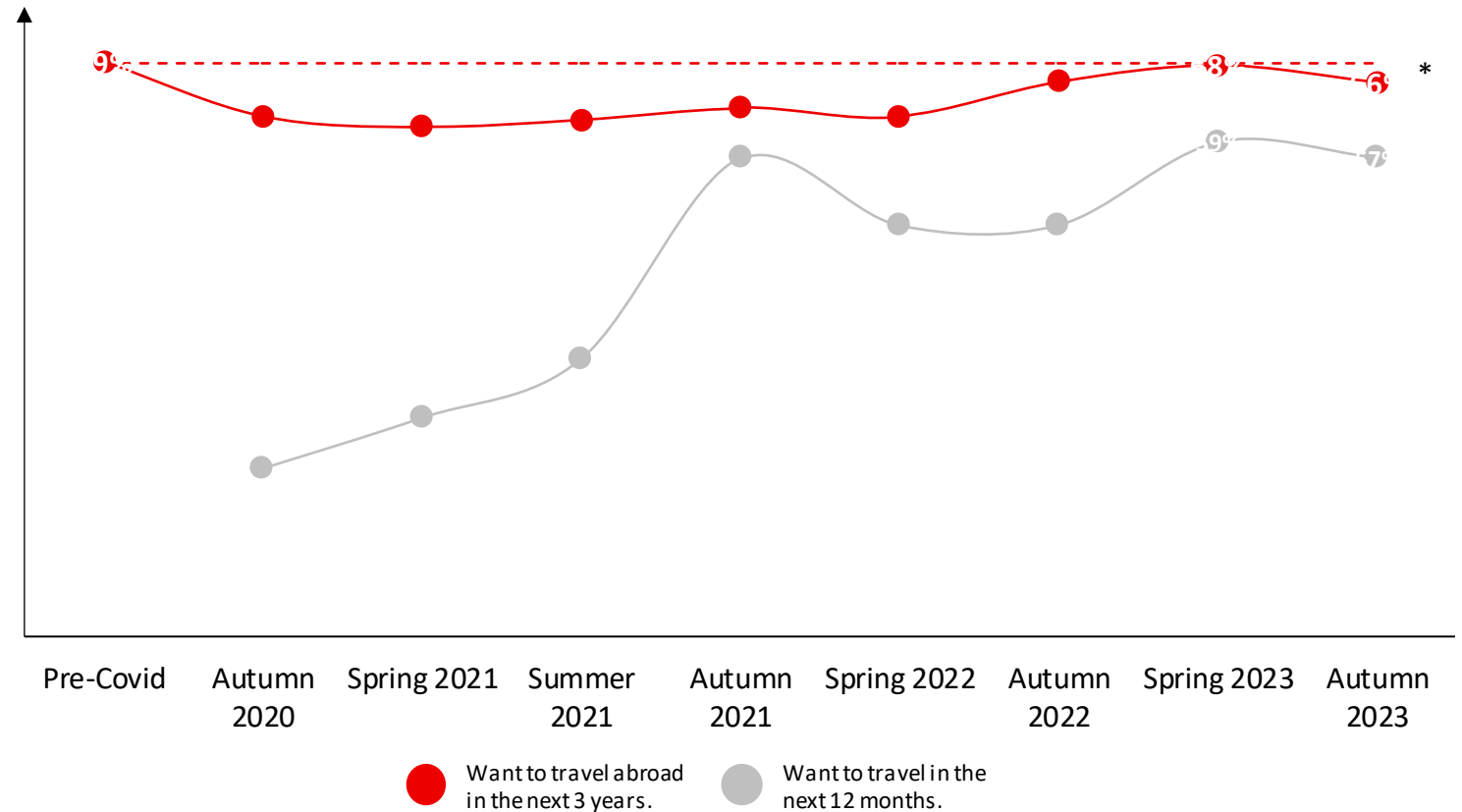


Proportion of people who want to travel abroad in the next 3 years.

## The vast majority of those who want to travel in the next 3 years want to go abroad as early as in the coming year

The desire to travel, the interest in going abroad in the next 3 years, also suffered a slight blow during the pandemic, but the proportion who wanted to travel remained high.

Few thought it would be possible to travel abroad in the near future during the pandemic. From autumn 2020 until spring 2021, the vast majority were reluctant to travel abroad in the short term. As the pandemic receded in the autumn of 2022, the intention to travel abroad for the next 12 months jumped. Faith in the future was back and tourism was expecting a rebound. War, inflation and a challenging economic situation severely dampened travel intentions in 2022. The polls in 2023 show that over 85 per cent of those who want to go abroad expect to travel in the next 12 months. There is little doubt that there is a major underlying desire to travel, regardless of turbulence and uncertainty.



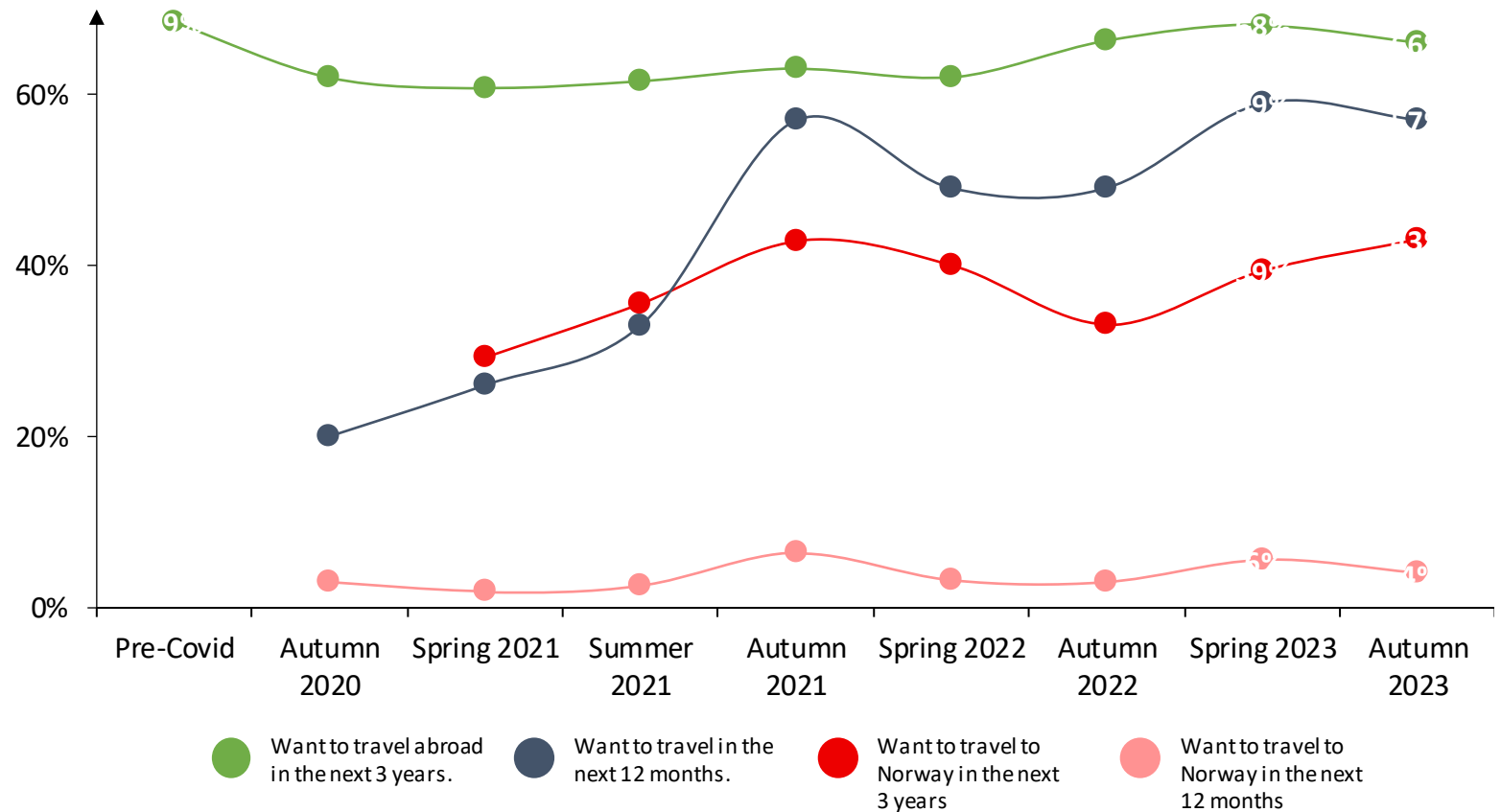
Proportion of people who want to travel abroad in the next 3 years.

## It's a long way from interest in Norway to departure for Norway

The gap between the interest in travelling to Norway in the next 3 years and 12 months is partly due to the fact that interest in Norway in the next 3 years measures their attitude towards Norway, more than a specific travel intention. The proportion who want to travel to Norway in the next 3 years, shows that they "would like to go on a holiday to Norway in the next 3 years". These respondents are positive but have not chosen Norway over another country or destination.

Those who have responded Norway in the next 12 months, on the other hand, have chosen Norway from a list of 30 other countries and regions, without being asked about Norway. In addition, there is a big difference between being open for travelling in a somewhat unclear future (3 years) and already being set on Norway in the coming year.

The group that wants to travel in the next 12 months has a much stronger intention to choose Norway over other countries.

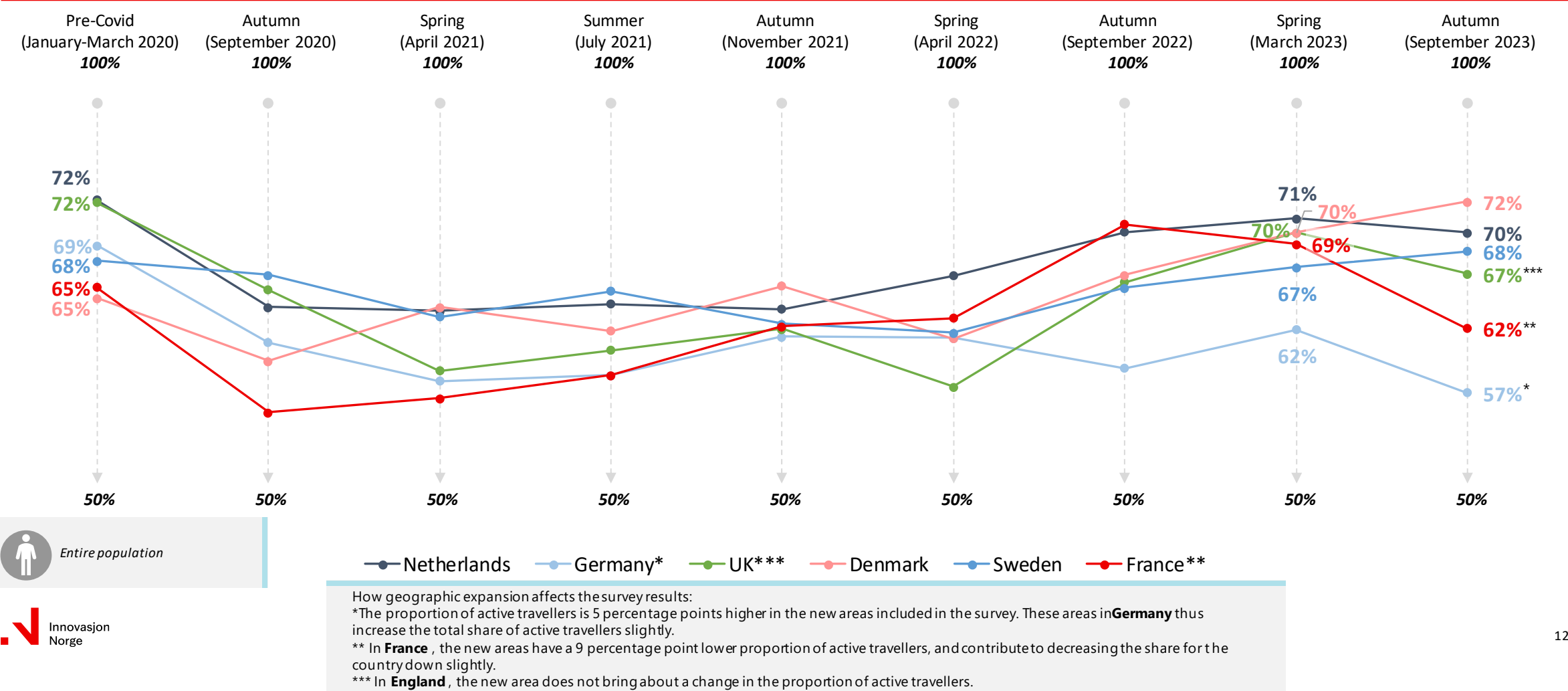


Entire population

Proportion of people who want to travel abroad in the next 3 years.

# Sharp increase in the proportion of people who want to travel abroad in Denmark in recent years

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






Destinations in the next 12 months

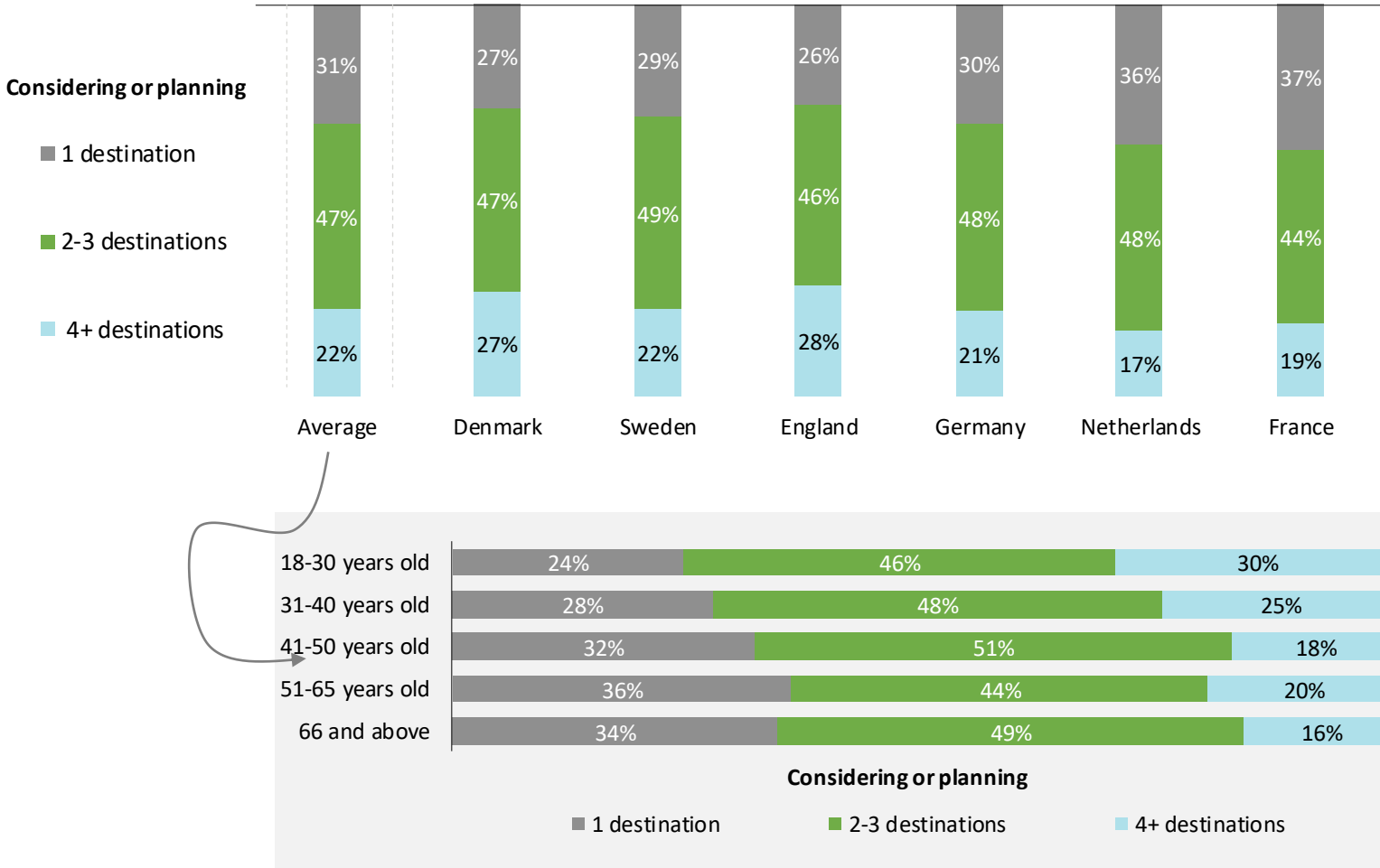
# 2 out of 3 are considering several destinations

The French and Dutch are increasingly considering only one specific destination for the next 12 months. 1 in 5 ticked four or more countries/destinations that they are considering or planning to visit. In all markets, travellers are considering fewer destinations now than in the spring. It is a natural seasonal fluctuation that travellers consider more destinations in April than in September.

The youngest consider significantly more specific overseas destinations than the older.

 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 going abroad in the next 12 months



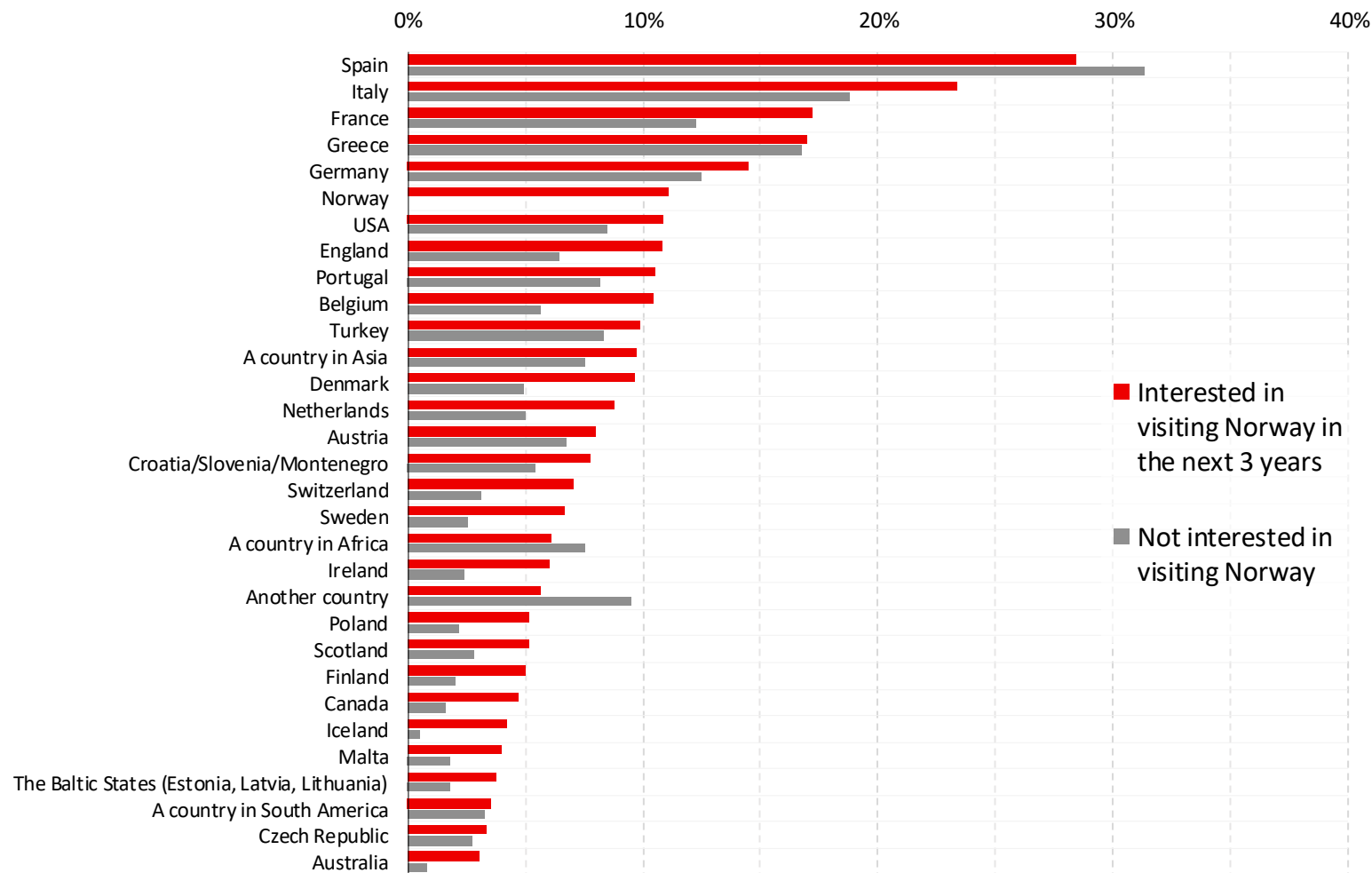
Destinations in the next 12 months

## Norway has moved up two spots as of autumn 2022

Norway has surpassed the United States and England, moving up from 8th to 6th place on the list of destinations for those interested in travelling abroad in the next 3 years. No fewer than 41 per cent of those interested in travelling abroad are also interested in visiting Norway.

Those interested in visiting Norway are less interested in sunshine and warmth, and less interested in holidaying in Spain and Turkey.

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

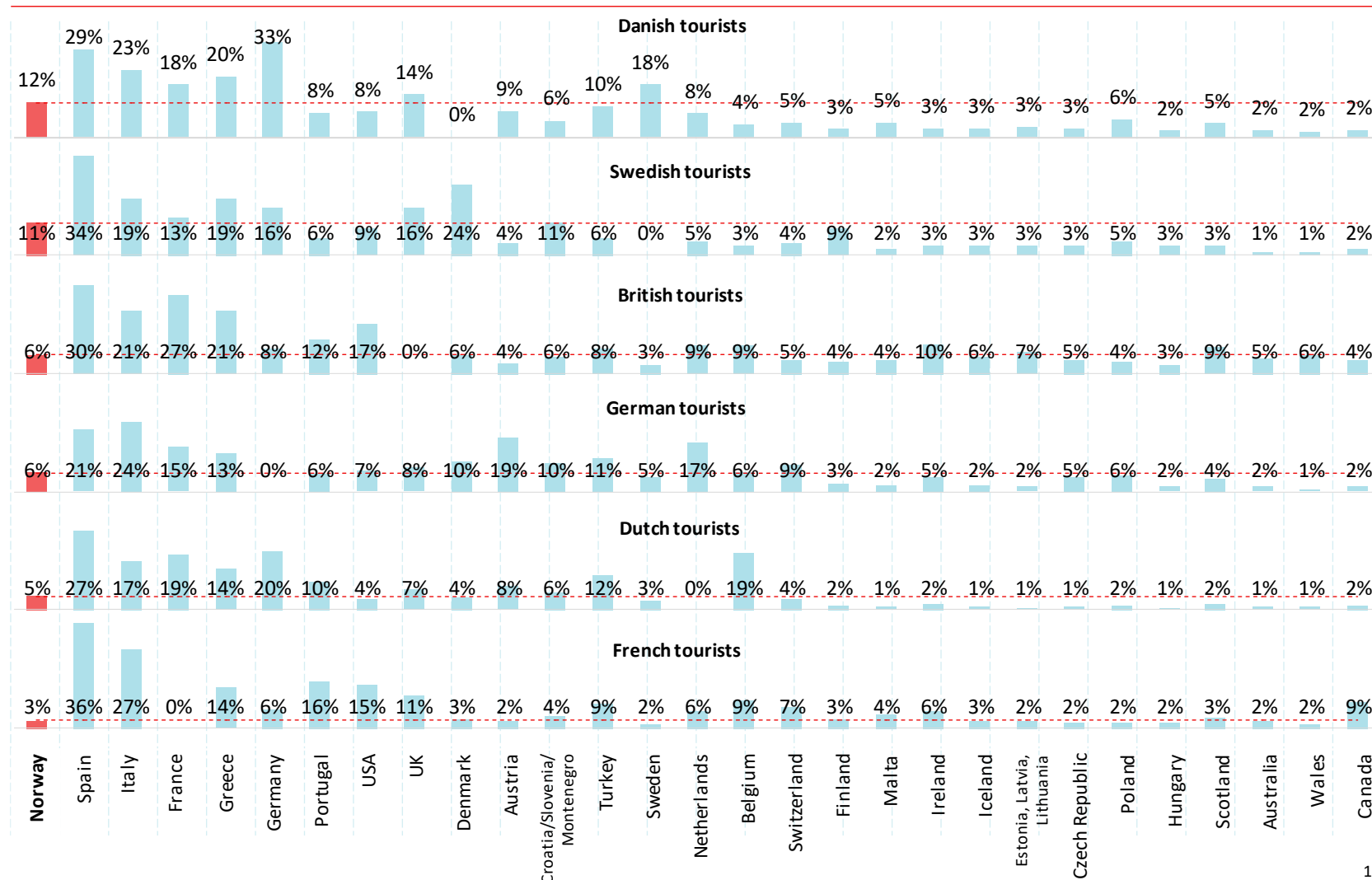


This page looks at people who are interested in travelling abroad in the next 12 months

Destinations in the next 12 months

## Norway is higher on the wish list in all markets than in autumn 2022

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 going abroad in the next 12 months



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

Destinations in the next 12 months

## Norway in the top 10 in Sweden and Denmark

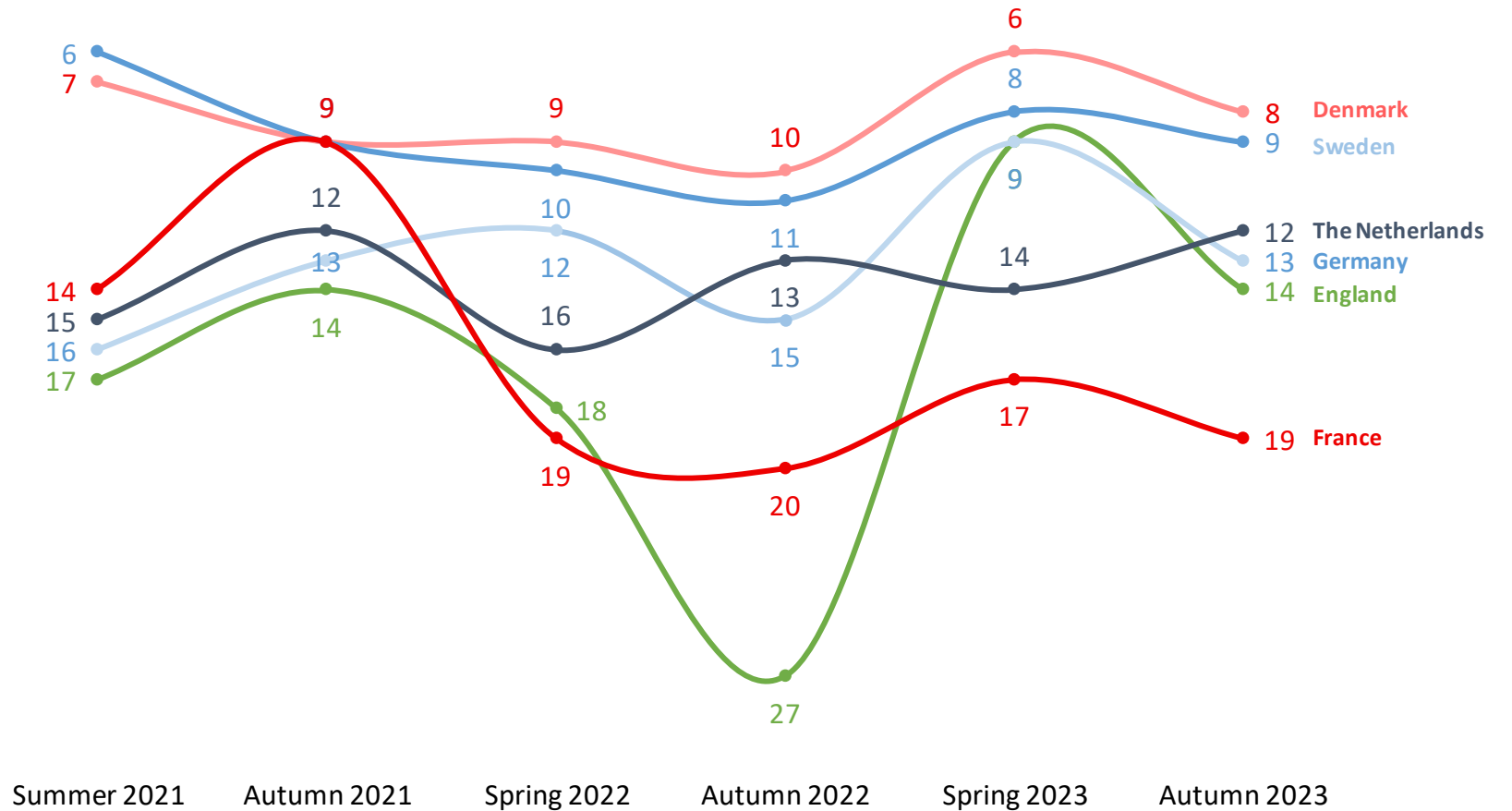
Norway is more popular in all markets, with the exception of the Netherlands, than before the 2022 winter season.

Travellers could choose between 28 countries and three regions as potential destinations for the next 12 months.

In England and Denmark, which are very important winter markets, Norway is in a very good position ahead of the coming winter season.

### Norway's ranking over time:

Among those interested in travelling abroad in the next 12 months



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



Influence of surrounding area

## Uncertainty remains unchanged, but more people want to travel in the coming 12 months

45% respond that one of the following factors is influencing or will influence their travel choices “to a large extent” in the next 12 months.

Extreme weather affects the travel choices of about half of all travellers. Women, young people and families with children are most affected. These are also the ones who are most concerned about sustainability. Weather events affect travellers to a greater extent than the climate crisis, although the proportion affected by the climate crisis has also increased slightly.

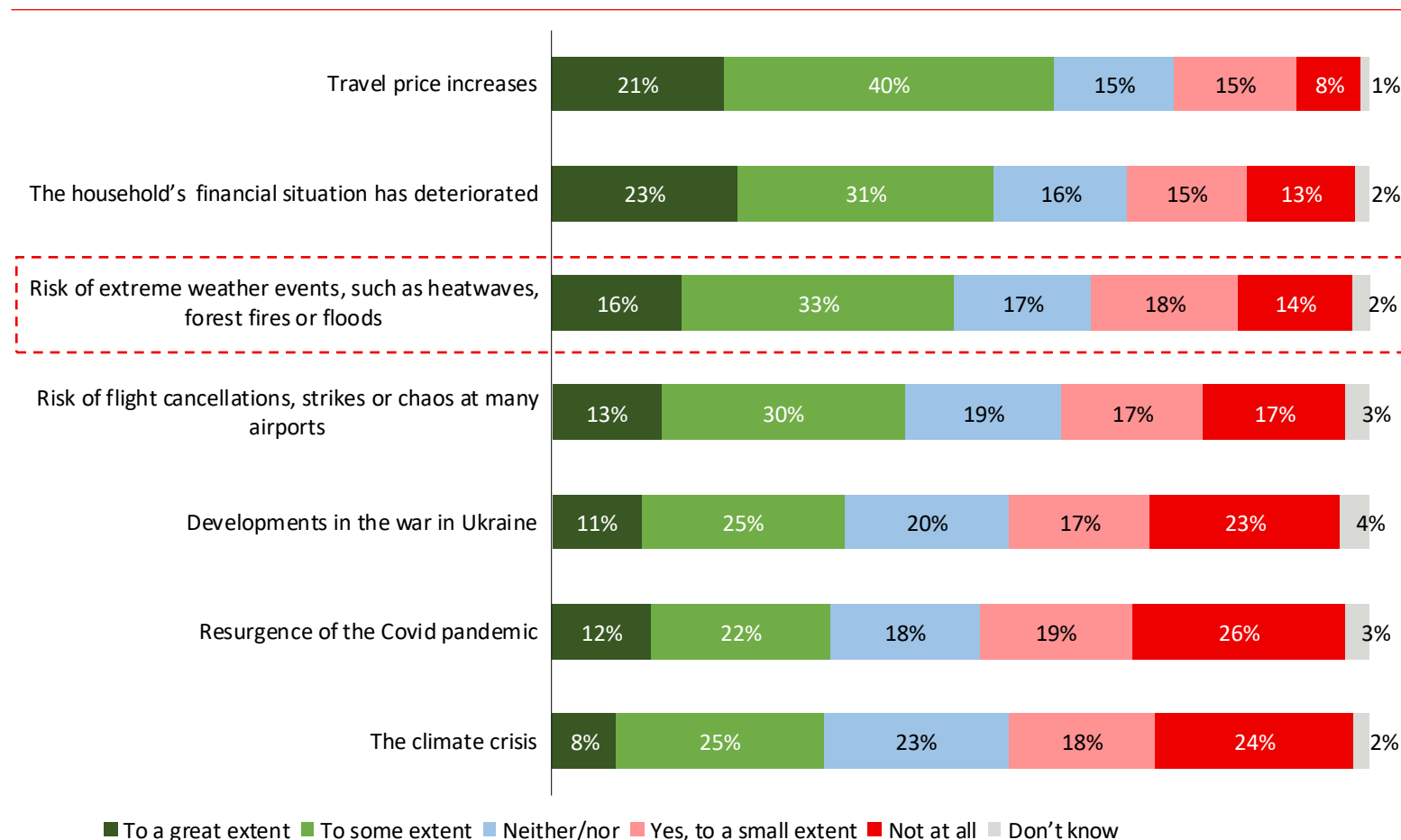
The impact of the war in Ukraine has decreased somewhat. The poll was taken before the war between Israel and Hamas started.



*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 surrounding area

## Economy and weather have the biggest impact on travel plans

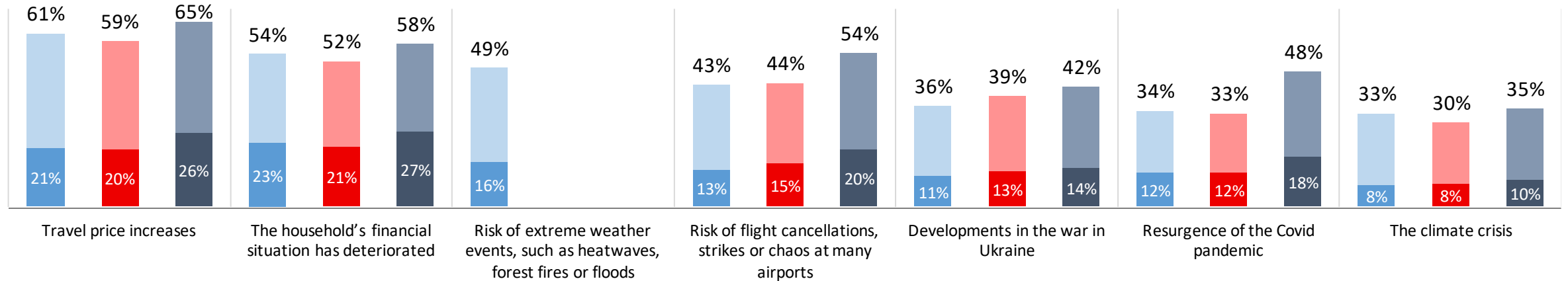
Inflation and a demanding economic situation are influencing the travel choices of the majority of the tourists. Those with the lowest incomes are affected the most, together with families with children living at home. Women are significantly more affected by a deteriorating economic situation than men.

Those interested in travelling to Norway in the next 3 years are significantly more affected by both travel price increases and their household's financial situation than those who are considering Norway as early as in the next 12 months.

### 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'



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

■ Autumn 2023 ■ Spring 2023 ■ Autumn 2022

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



**People over the age of 50** are affected to a lesser extent than people between 18 and 50 years.



**Men are less affected** than women



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



**Families with children are more affected**  
– especially French and British families with children



**People who have been on more than four foreign holidays** in the past three years are less worried about the economy



**The Dutch are less worried** than other markets



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

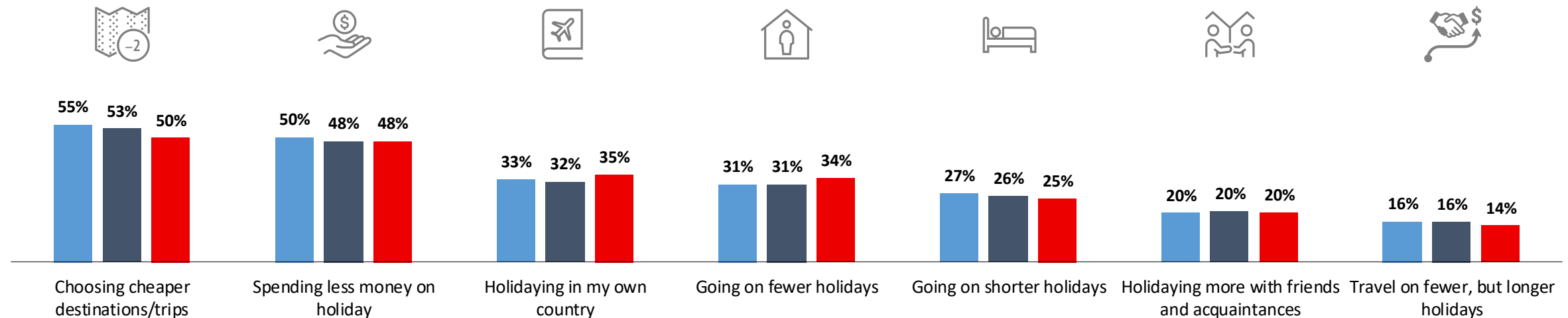
Impact of inflation and the economic downturn

## 7 out of 10 are affected by inflation and/or a worsening economic situation

The majority of those who are affected by price increases and/or a deterioration in their household's financial situation are adapting their travel plans by choosing cheaper destinations and/or by spending less money on holidays than they otherwise would have done.

Those under 35 are open to fewer, but longer vacations. The differences in how tourists in different income groups adapt to a demanding economic situation are small. In general, those with the highest incomes travel significantly more. Those interested in travelling to Norway in the coming year are more inclined to choose holidays with shorter durations and cheaper destinations.

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



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

■ Autumn 2023 ■ Spring 2023 ■ Autumn 2022





## Topic 2:

# **Associations with and interest in Norway as a destination**

What do potential visitors associate with Norway as a destination? What do they want to experience on a holiday in Norway and what time of year do they want to travel here?

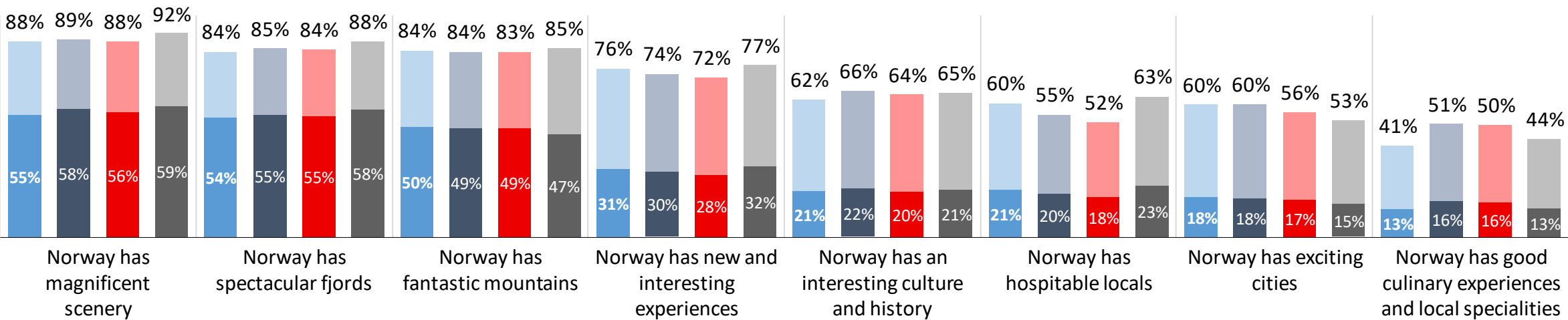
# Norway is without doubt best known for its magnificent scenery, fantastic fjords and mountains


Norway is climbing back towards pre-pandemic levels for hospitable locals. The Swedes, Danes and Dutch pull the result down, while the French and English agree more that Norway has hospitable locals. Is it the issues of closed borders and restrictive policies during the pandemic that are losing their grip? The positive trends are represented in all markets, and it is the youth who are most positive.

## 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

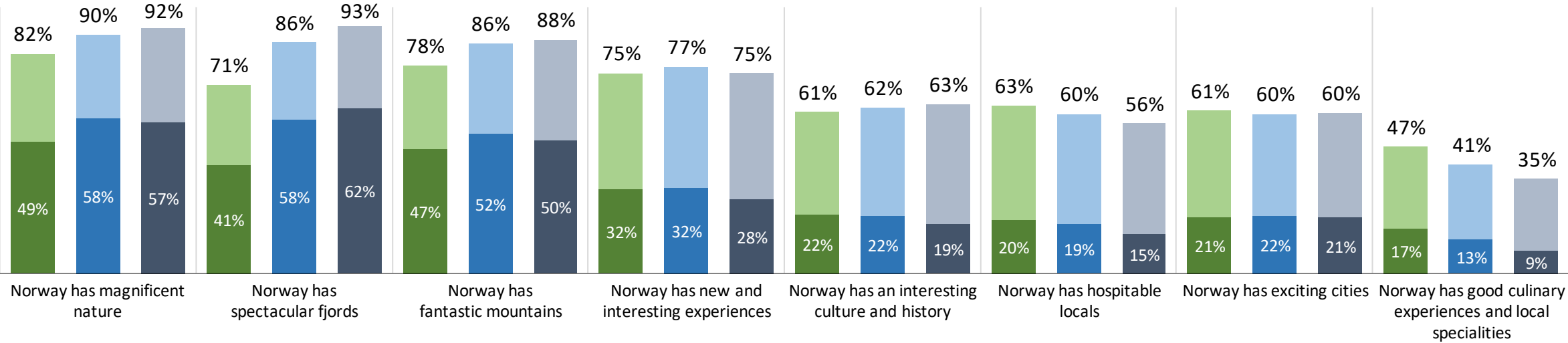
# The youngest are less impressed by Norwegian nature


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 captivated by Norway's nature and more enthusiastic 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+

Development of brand Norway across those who have or have not visited Norway

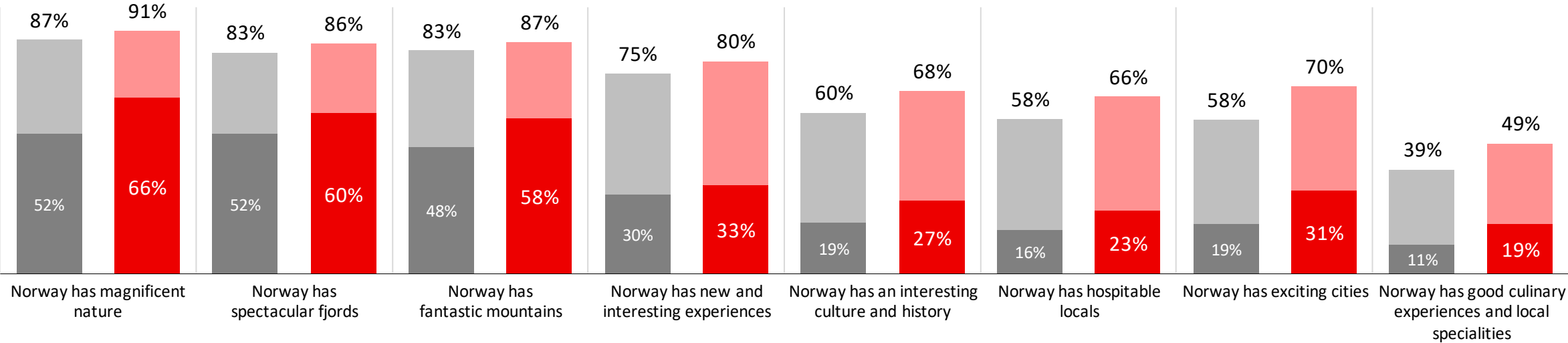
# Those who have been to Norway are enthusiastic about more than nature


"Everyone" agrees that Norway has magnificent scenery. Those who have visited Norway are significantly more positive about the culinary experiences and the locals than those who have not been here. However, it is worth noting that only 19 per cent of those who have been to Norway before, strongly agree that there are good culinary experiences and local specialties in Norway, and that half are neutral or disagree with the statement.

## 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

 Have not been on holiday in Norway over the last 6 years

 Have been on holiday in Norway over the last 6 years



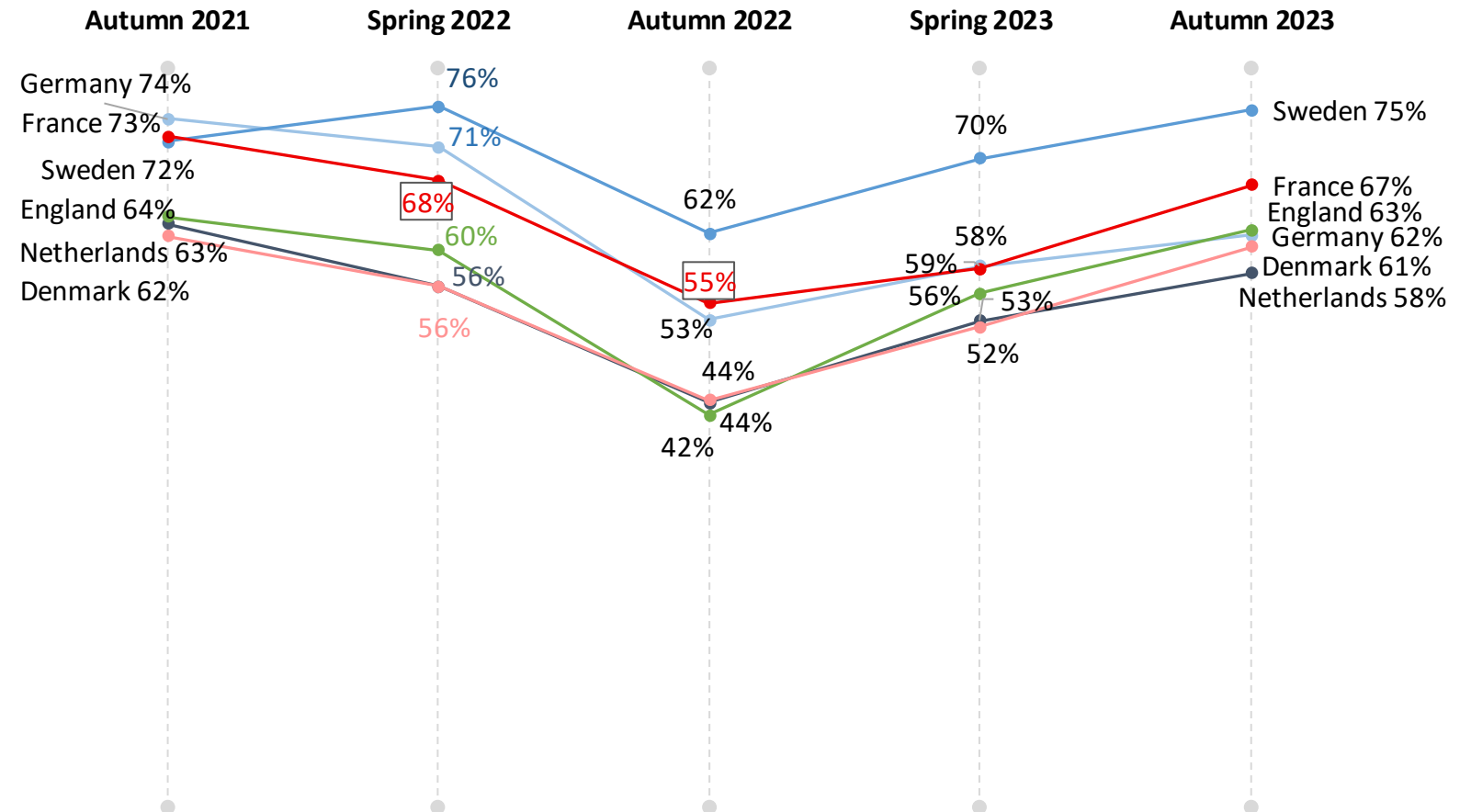
Interest in travelling to Norway in the next 3 years

## Norway is increasingly popular

Between 58 and 75 per cent of all those interested in travelling abroad are interested in going on holiday or a leisure trip to Norway in the next 3 years. It is encouraging that interest in Norway is high across markets.

Developments in the German market differ markedly from developments in all other markets. The proportion who want to travel abroad is significantly lower than before the pandemic, as is interest in Norway as a destination.

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



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

Timing of travel in the next 3 months

## In England, winter is more popular than summer in Norway

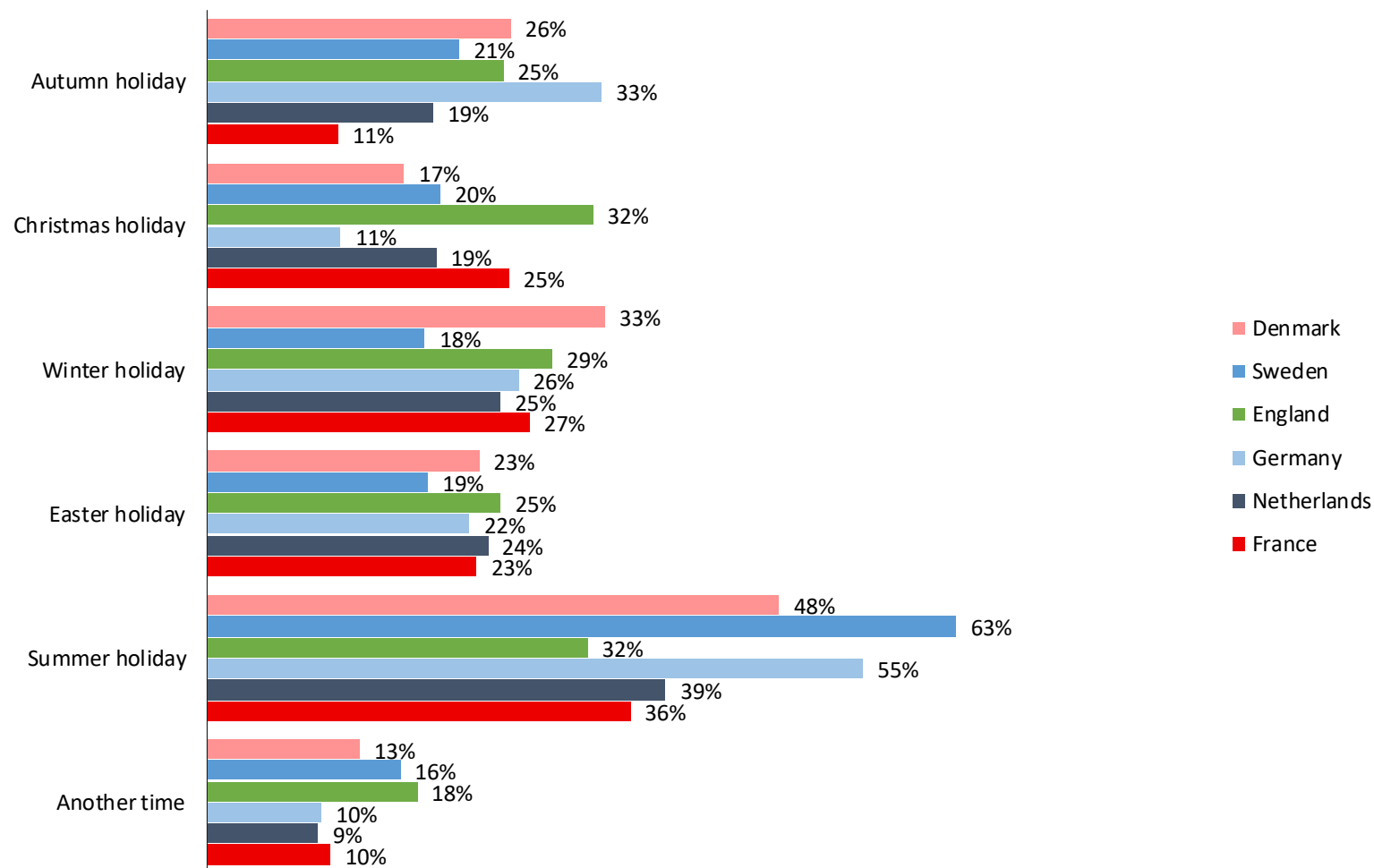
Interest in Christmas and winter holidays in Norway has increased since the survey in April. No fewer than 32 per cent of Britons who interested in travelling to Norway would like to do so at Christmas, up from 23 per cent in the spring. There are just as many who are considering summer holidays in Norway

Danes prefer winter holidays and 1 in 3 are considering winter holidays in Norway. Many are considering Christmas and winter holidays in Norway in the next 12 months.



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 is very important on a holiday in Norway

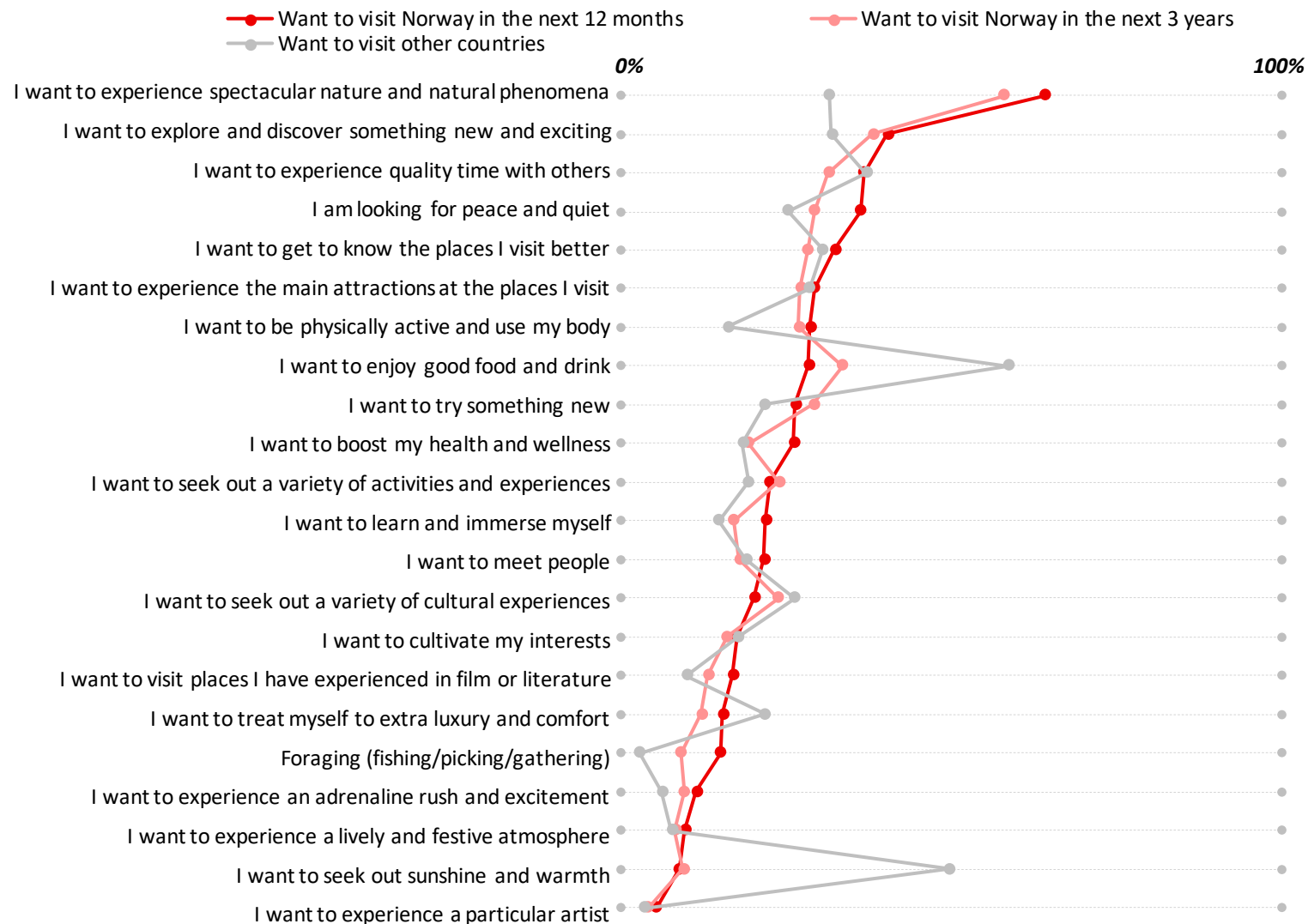
Those who are interested in Norway differ from other travellers in particular by being more interested in nature experiences, silence, exploring something new, physical activity, getting an adrenaline rush and foraging (fishing/picking/gathering). They are less concerned about sunshine and warmth, enjoying food and drink, comfort and extra luxury.

Those who have been in Norway during the last six years are more concerned with physical activity and foraging (fishing/picking/gathering), cross-country skiing and alpine skiing.

 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



Experiences in Norway and elsewhere in the world

## The fjords are a must for those who have immediate plans for Norway

The fjords, followed by historical and cultural sites and the Northern Lights are the top 3 experiences among those interested in travelling to Norway the next 12 want to have.

The fjords and the Northern Lights are equally important among those who have not been on holiday in Norway in the last six years. For those who have already been here, the fjords are the main draw.

The Northern Lights are more important for those considering Norway in the next 3 years, but those who dream of the Northern Lights have less immediate plans to make their dream a reality.



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

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

— Want to visit Norway in the next 12 months — Want to visit Norway in the next 3 years — Want to visit other countries



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 and England. Outdoor activities in winter are most attractive for tourists from outside Scandinavia.

Interest in experiencing a snowy winter, alpine skiing, snowboarding and cross-country skiing has increased significantly from the autumn 2022 and spring 2023 surveys.

4 out of 10 have chosen one or more physically active experiences (nature activities during the summer, alpine skiing or snowboarding, cross-country skiing or nature activities during the winter months)



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

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



Experiences in Norway and elsewhere in the world

## Many people want to experience culture and history in Norway

As many as 55 per cent of those considering Norway in the coming year want to seek out historical and cultural sites on their next holiday here. Only the fjords are more popular than historical and cultural sites.

Cultural experiences are a natural part of the holiday among those who come to experience the distinctive nature of Norway. They are less important for those who come for alpine skiing.



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

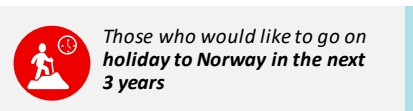
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— Want to visit Norway in the next 12 months — Want to visit Norway in the next 3 years — Want to visit other countries



## Nature experiences a must when holidaying in Norway

Those who are 66 years and older are far away from alpine skiing and snowboarding, which means that there are few in this age group who are interested in alpine skiing. Germany is close to round trips and the Danes are close to quality time with others. This means that many in this market would like to experience this






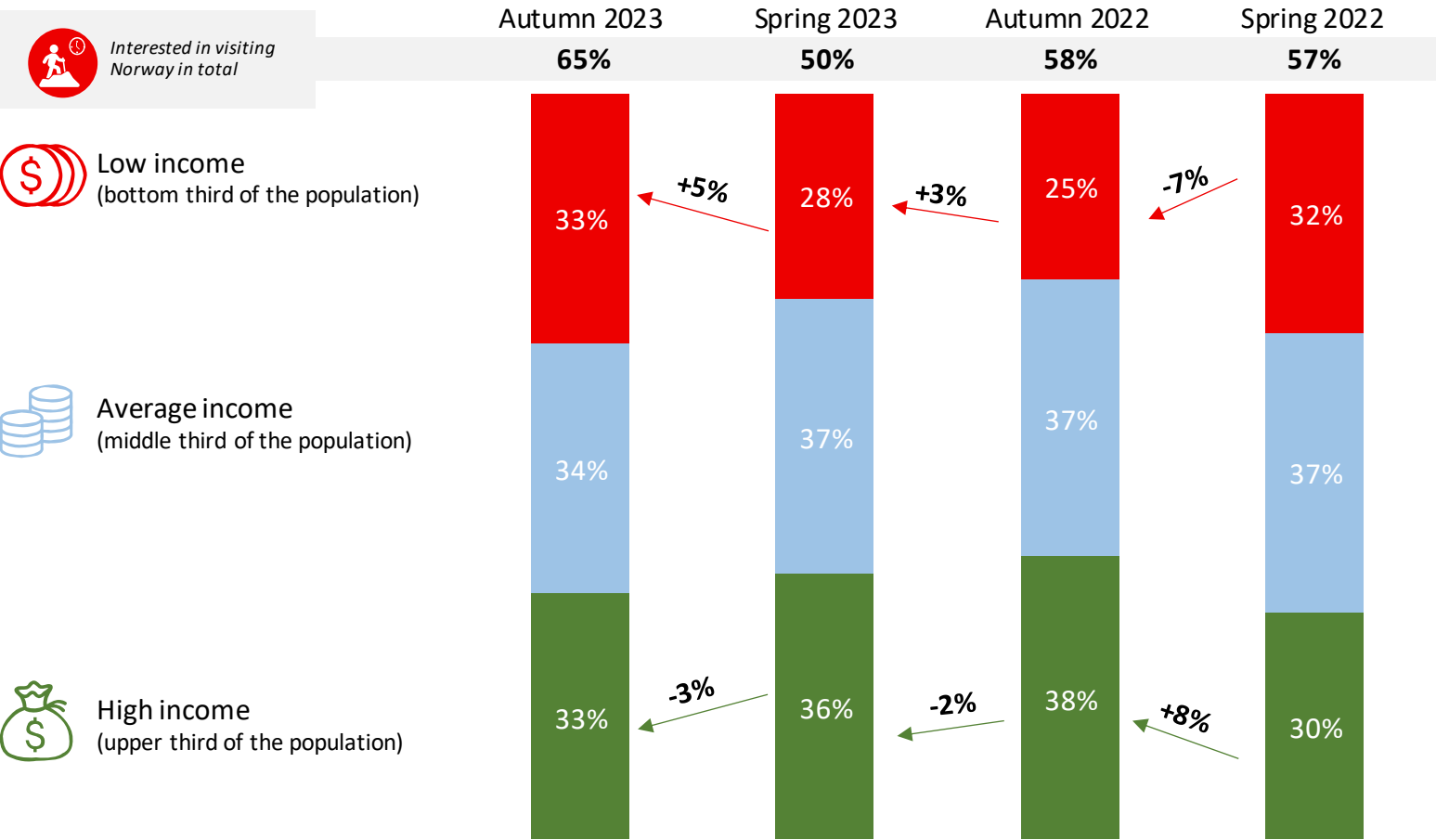
# Interest in Norway has increased among those with the lowest incomes

Interest in travelling to Norway in the next 3 years has increased in the group with the lowest income. There is still a higher interest among those with high incomes to travel to Norway in the coming 12 months. Those with low incomes are positive, those with high incomes are almost travel-ready.

Those with the highest incomes are less affected by inflation and a demanding economic situation, and they travel considerably more than those with lower incomes.

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

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



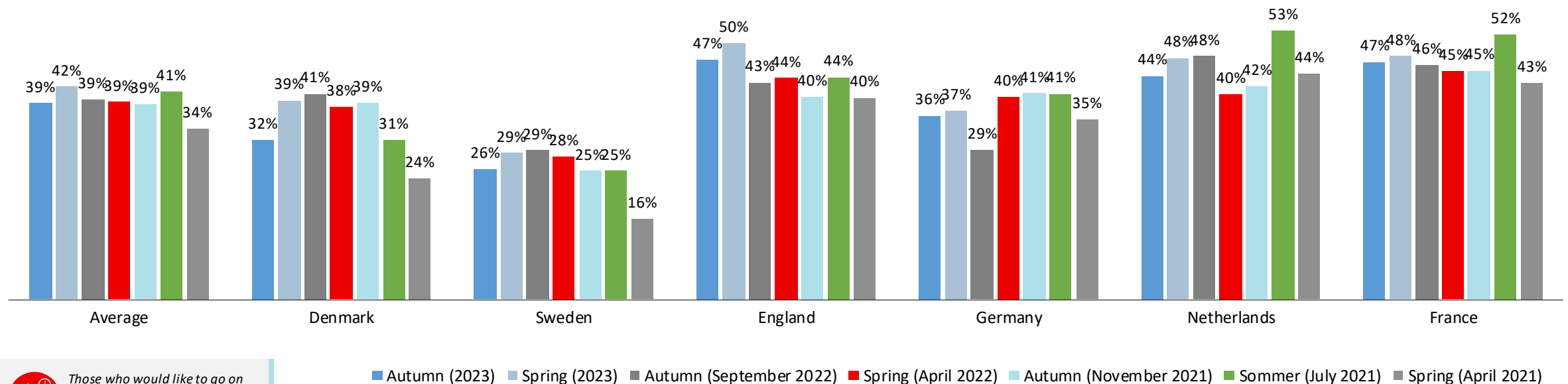
## Fewer want to book their Norwegian holiday as a package holiday

The proportion who would like to buy their Norwegian holiday as a package holiday is still much higher than it was before the pandemic, particularly in Denmark, Sweden and England. In Germany and the Netherlands, the proportion wanting to buy package holidays is back at the same level as before the pandemic.

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



## Topic 3:

# **The importance of sustainability**

What is the significance of sustainability for tourists? Is a holiday in Norway a sustainable choice?

Sustainability over time

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

The proportion who are keen to take responsibility for ensuring that their travels do not have a negative impact on nature, the environment and the climate is stable after a slight fall following the outbreak of war in Ukraine and subsequent price rises as well as a worsening economic situation for many.

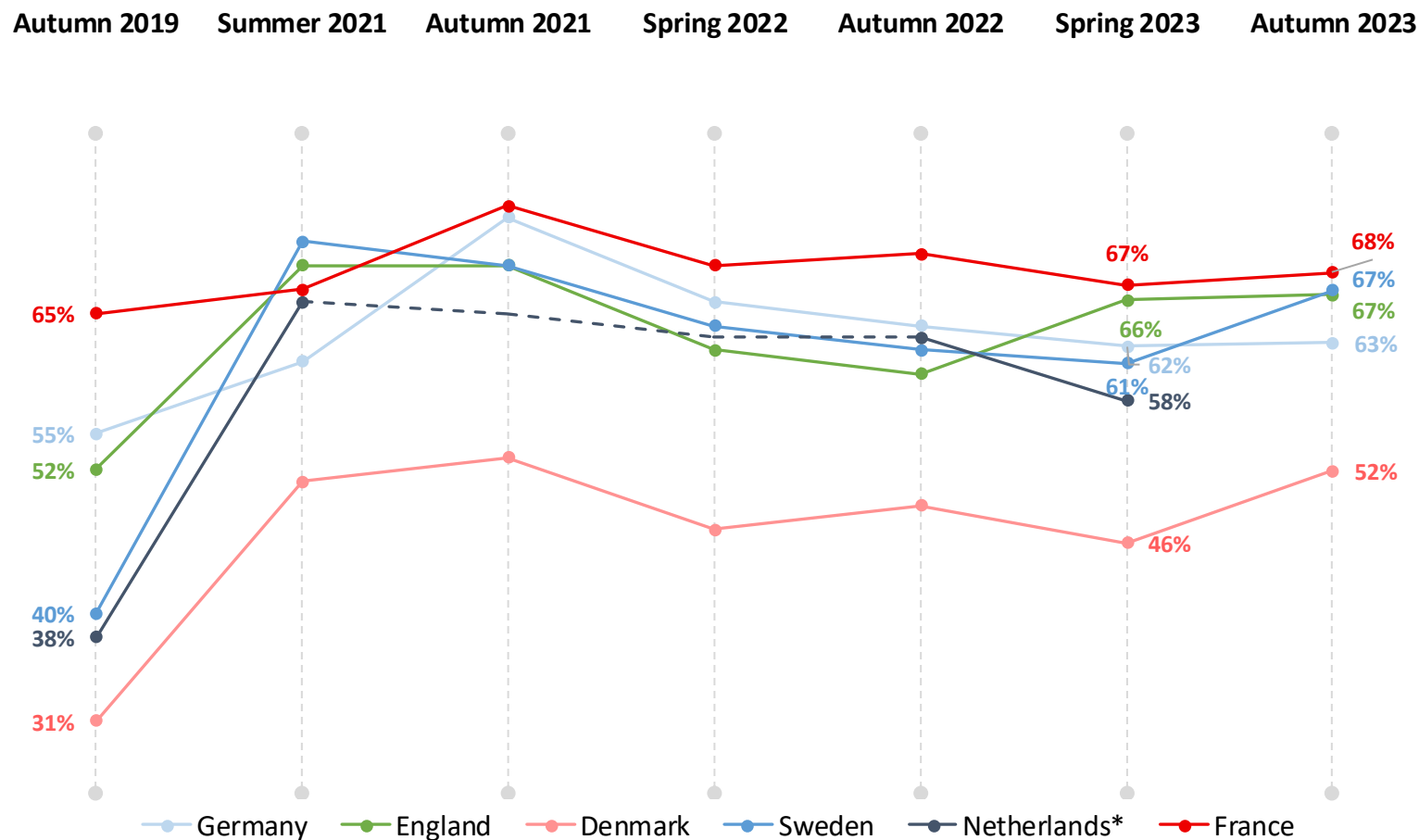
49 percent said the *risk of extreme weather events, such as heatwaves, forest fires or flooding*, affects their travel plans. Almost half are trying to adapt their travel plans to avoid extreme weather and the consequences of climate change.

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\*\*. Proportion who responded strongly agree or disagree.



\*The Netherlands in autumn 2021 and spring 2022, as well as autumn 2023 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

## Climate-friendly modes of transport most important for those considering Norway

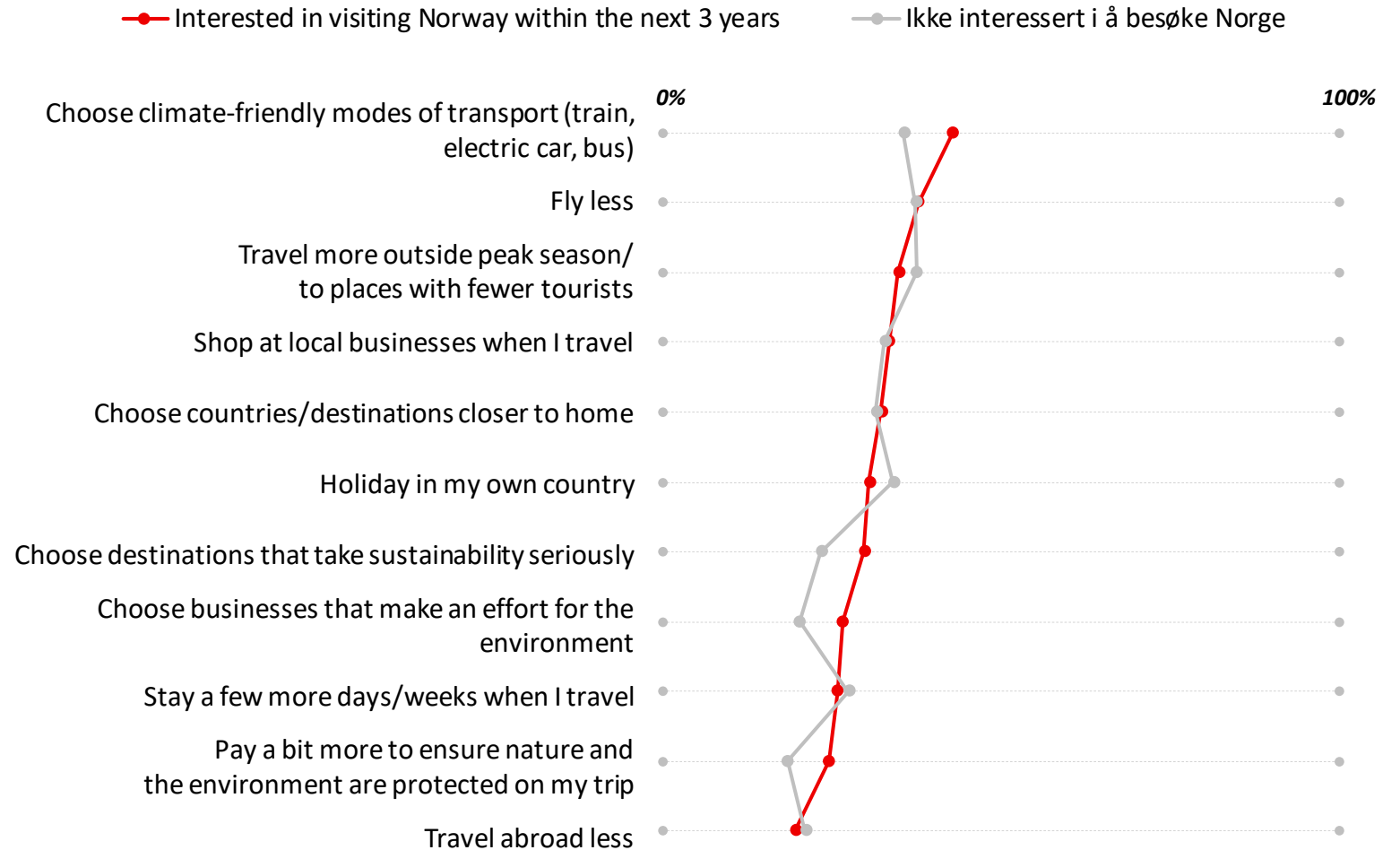
Those considering Norway in the coming 12 months score higher on all the options in the list on the right. They are also more willing to take responsibility for ensuring that the way they travel does not negatively affect the environment, climate and nature than the much larger group of travellers who are positive about Norway in the next 3 years.

Those who want to travel to Norway in the coming year travel significantly more than average. As much as 37 per cent have been on 4 or more trips abroad in the last 3 years, compared to 26 per cent on average for everyone interested in travelling abroad.



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

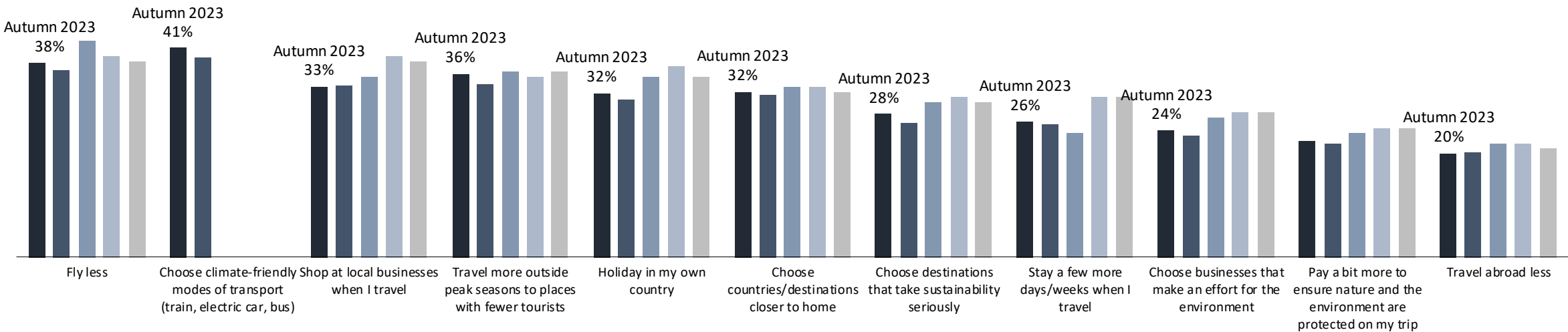
Will you do any of the following to prevent the way you travel from having a negative impact on the environment, climate and nature? Proportion of active tourists. Average across markets.



# Climate-friendly transport is most important for travellers

The vast majority of "measures" to travel sustainably have declined after the travel situation has normalised after the pandemic. The proportion who want to travel outside the high season and choose destinations/countries that are closer has remained relatively stable over the past two years. The choice of means of transport is most important across markets. As many as 48 per cent of Germans respond that they will fly less, which is 10 percentage points higher than Sweden (which is number two) with 38 per cent.

**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.



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

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


Norway is a sustainable choice

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

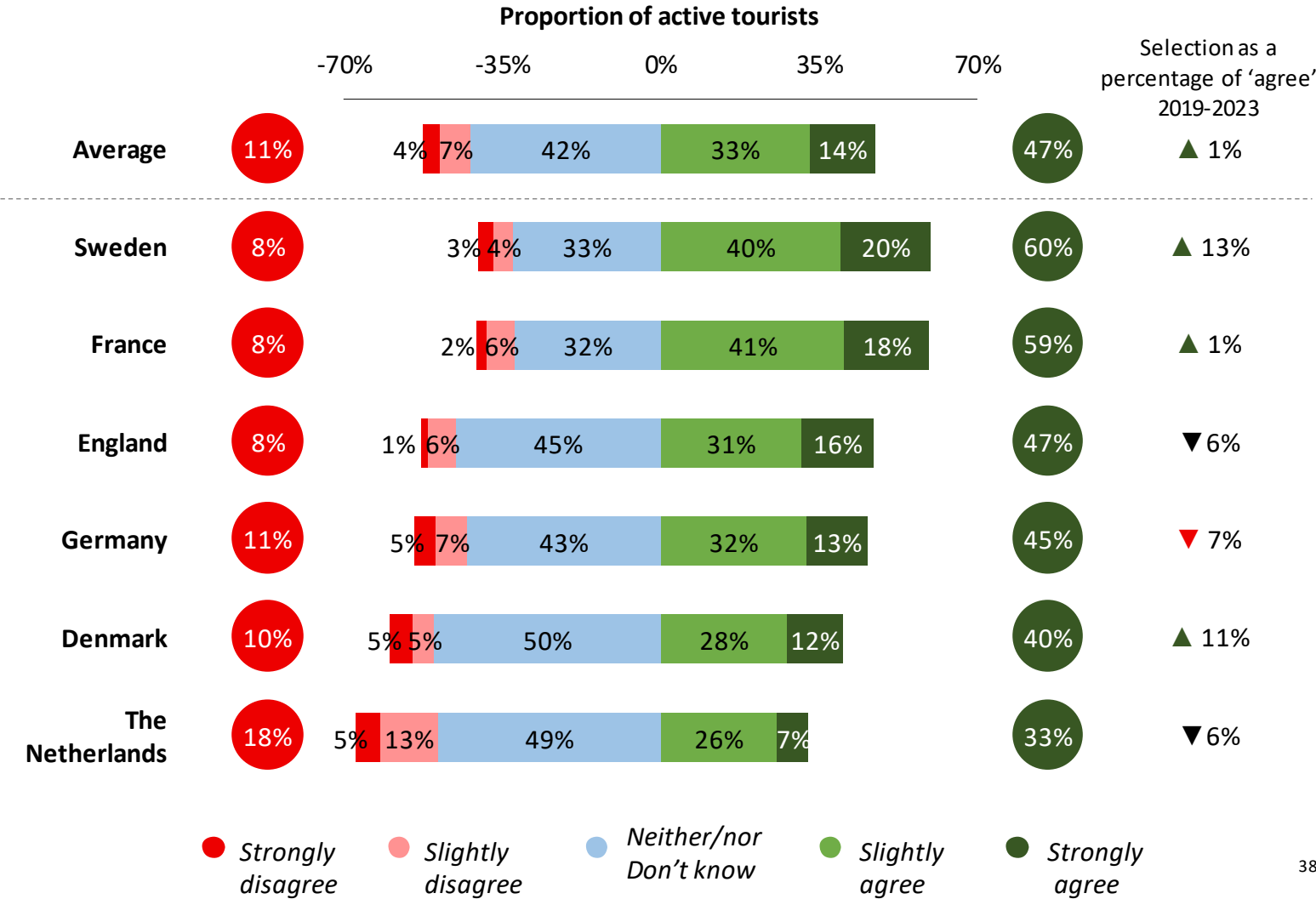
A trip to Norway is perceived as being a more sustainable choice now than before the pandemic in Sweden and Denmark.

The proportion who strongly or slightly disagree has decreased since the previous survey in France and England, and there are more who perceive a trip to Norway as a sustainable choice. Those interested in Norway believe to a much greater extent that travelling to 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.





Sustainability over time

## Norway is a sustainable choice for an increasing number of Danes and Swedes

A trip to Norway is perceived as being a more sustainable choice for Swedes and Danes now than before the pandemic (autumn 2019). For all other countries, this is at the same level or lower than it was before the pandemic.

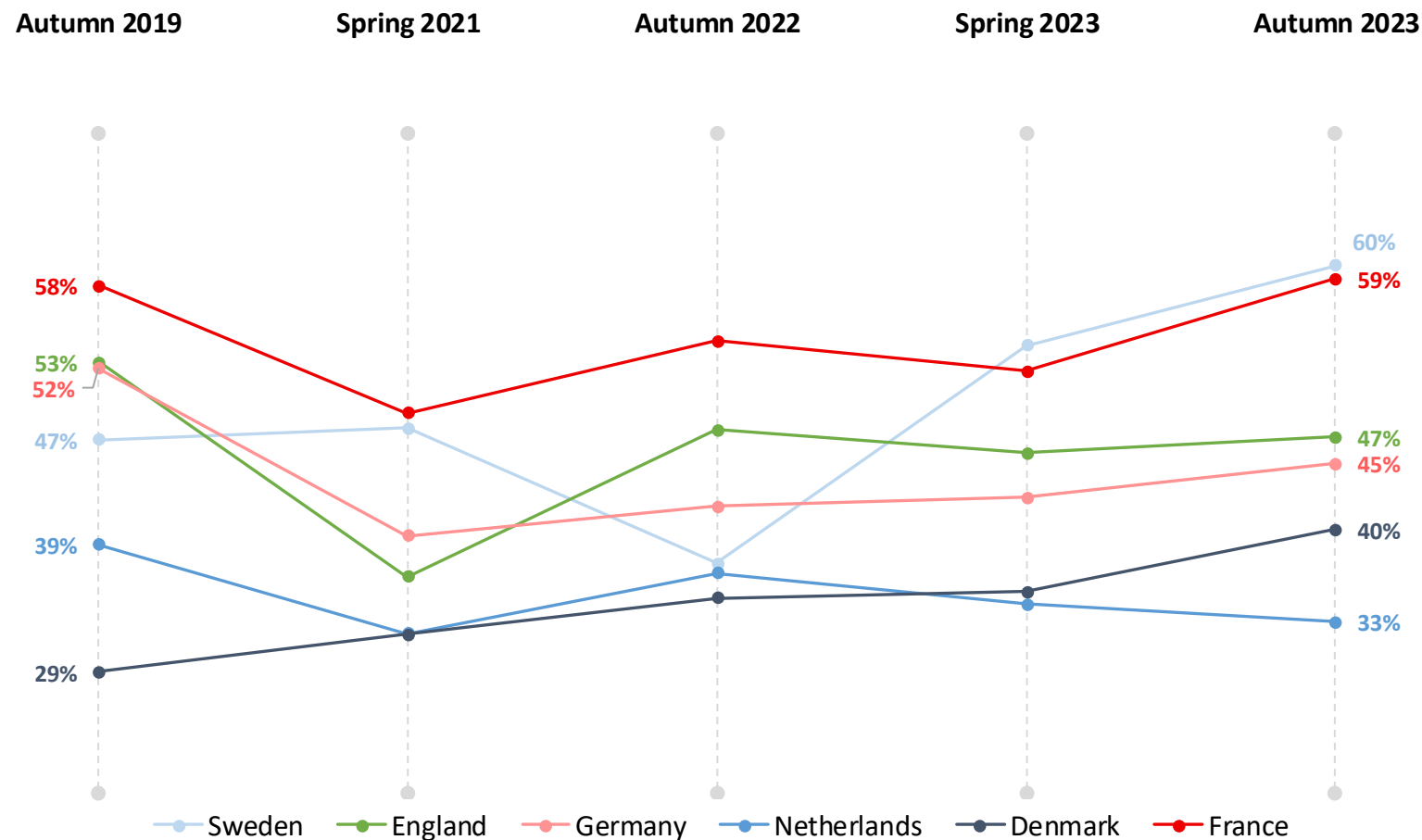
For many travellers, sustainability is largely about climate-friendly transport and proximity. It is therefore natural that Norway as a sustainable choice strengthens in the markets closest to us.



*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.

Proportion who responded strongly agree or slightly agree.



\*The question was not asked in the surveys in spring 2022, autumn 2021 and summer 2021.



## Topic 4: **Target groups**

How do ski tourists, Northern Lights tourists and city tourists perceive sustainability, what motives do they have for travel and how many potential tourists are there?

Photo: @ Rune Dahl

#### Topic 4: Target groups

## Potential for winter tourism in the markets

There is great potential to increase both ski and northern lights tourism in the coming years. There is a significant proportion in all measured markets that would like to travel to Norway for a winter holiday in the next 3 years.

Particularly in England and France, there are many who would like to travel to Norway on a skiing holiday, who have not been here before. At the same time, many people in Scandinavia who have been on holiday here would like to come again.

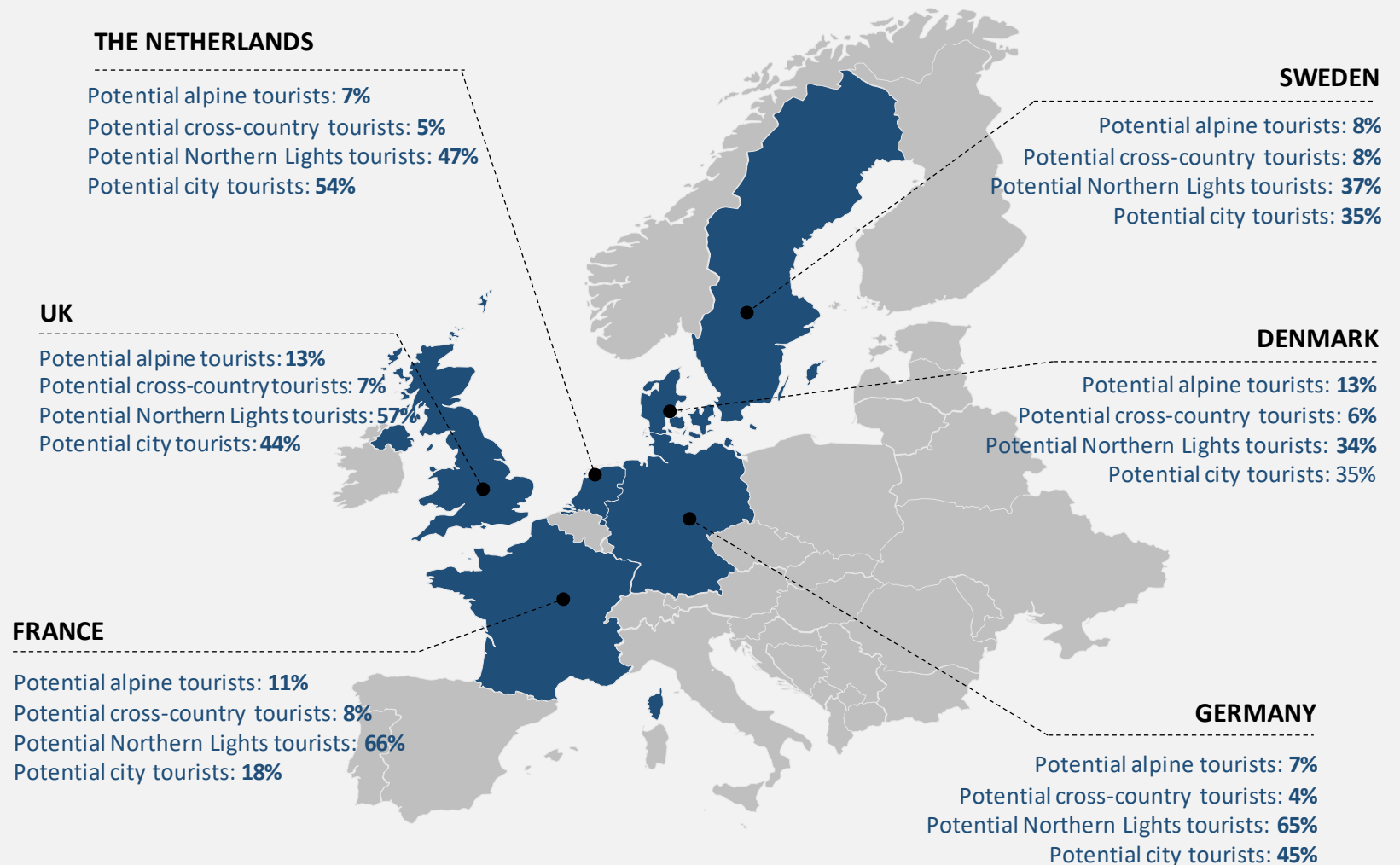
Explanation of the different target groups in the survey:

**Potential alpine tourists:** The proportion of active travellers interested in alpine skiing/snowboarding, either in Norway or abroad.

**Potential cross-country tourists:** The proportion of active travellers interested in cross-country skiing, either in Norway or abroad.

**Potential Northern Lights tourists:** The proportion of active travellers interested in seeing the Northern Lights, either in Norway or abroad.

**Potential city tourists:** The proportion of active travellers who want city experiences, either in Norway or abroad.

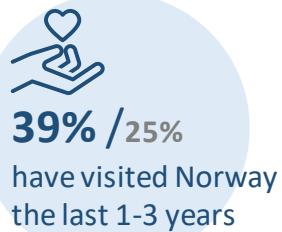
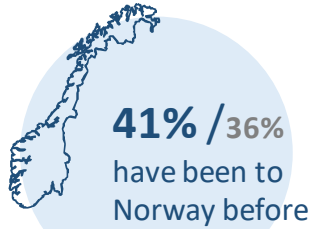


## Topic 4: Target groups

# Potential alpine tourists:

Potential alpine  
tourists:

Not in the target group



### Alpine tourists differ from others in that...

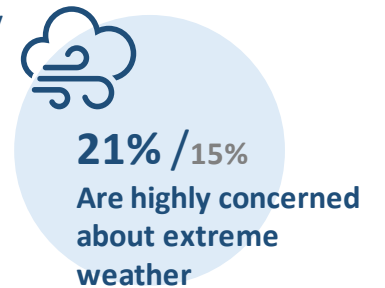
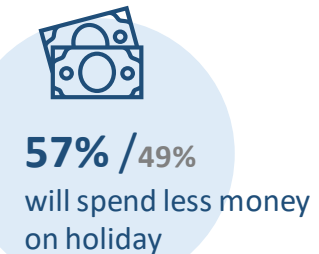
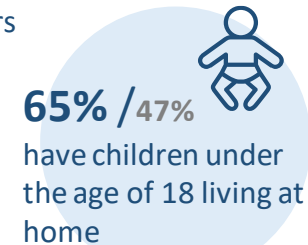
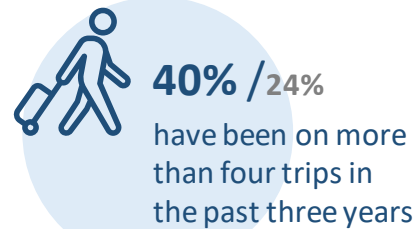
**22% / 7%**  
want to  
experience an  
adrenaline rush  
and excitement

**41% / 21%**  
want to be  
physically active

**39% / 20%**  
want to seek out a  
variety of  
activities and  
experiences

**18% / 7%**  
want to  
experience a lively  
and festive  
atmosphere

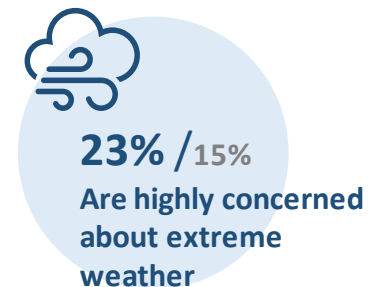
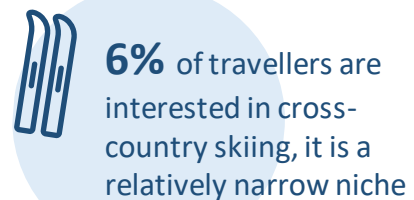
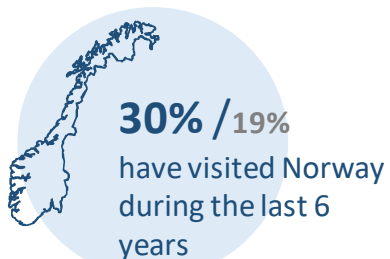
**28% / 15%**  
like to go to  
concerts, festivals  
and cultural events



## Potential cross-country tourists:

● Potential cross-country tourists:

● Not in the target group



### Cross-country tourists differ from others in that...

**10% / 3%**  
want to experience a particular artist

**22% / 11%**  
want to visit places from film or literature

**34% / 18%**  
want a boost in health and wellness

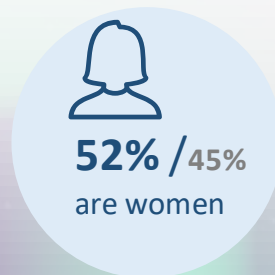
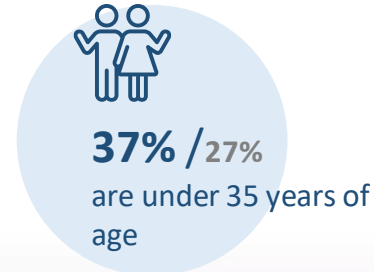
**36% / 19%**  
want to experience the Munch Museum in Oslo

## Topic 4: Target groups

# Potential Northern Lights tourists:

● Potential Northern Lights tourists:

● Not in the target group

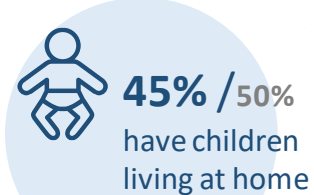
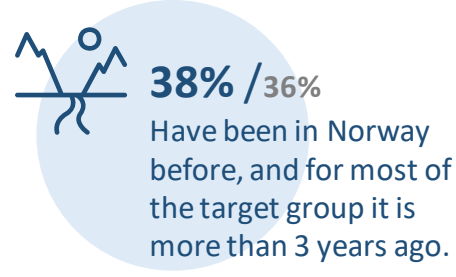




## Potential city tourists

Potential city tourists

Not in the target group



### City tourists differ from others in that...

**34% / 18%**  
want to seek out  
a variety of  
cultural  
experiences

**40% / 20%**  
want to  
experience the  
main attractions  
at the places  
I visit

**6% / 3%**  
want to  
experience a  
particular artist

**43% / 23%**  
want to  
experience  
architecture

**30% / 15%**  
want to  
experience art

**49% / 26%**  
want to experience  
museums, galleries  
and cultural  
attractions



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