

Digital Day of Competence D-A-CH 2026



Digital Day of Competence D-A-CH 2026 - Program

11.00 - 11.20

Welcome & update D-A-CH market by Ulrike Sommer & Ulrike Katrin Peters, Innovation Norway Hamburg

11.20 – 11.45

Bente Grimm, from FUR - Forschungsgemeinschaft Urlaub und Reisen e.V. & Reiseanalyse

“Tourism Demand in Germany: Cultural Travel Trends, Holiday Motivations and Activities – Insights and Opportunities for Norway”

11.45 – 12.00

Q&A

12.00-12.10

Coffee break

12.10-12.30

Thomas Marx, CEO of tour operator Vianova Reisen: “Product building & distribution channels shoulder season”

12.30-12.45

Q&A

12.45-13.00

Round up & open question session, hosted by Ulrike Sommer & Ulrike Katrin Peters

General situation Germany

Economy

Overall economic situation – recovery

- **GDP growth:** +1.3% (real, latest Joint Economic Forecast)
- **Inflation:** 2.9% (Aug. 2026; ifo)
- **Private consumption:** remains weak, pressured by higher energy prices and purchasing-power losses
- **Labour market:** remains weak; recovery expected to reach employment with a time lag

- **Business sentiment improving:** ifo Business Climate Index 89.9 in September, up from 88.8 in August (5th increase)
- **Investment push:** >€120bn federal investment planned in 2026, backed by a €500bn infrastructure & climate fund for 2025–2036

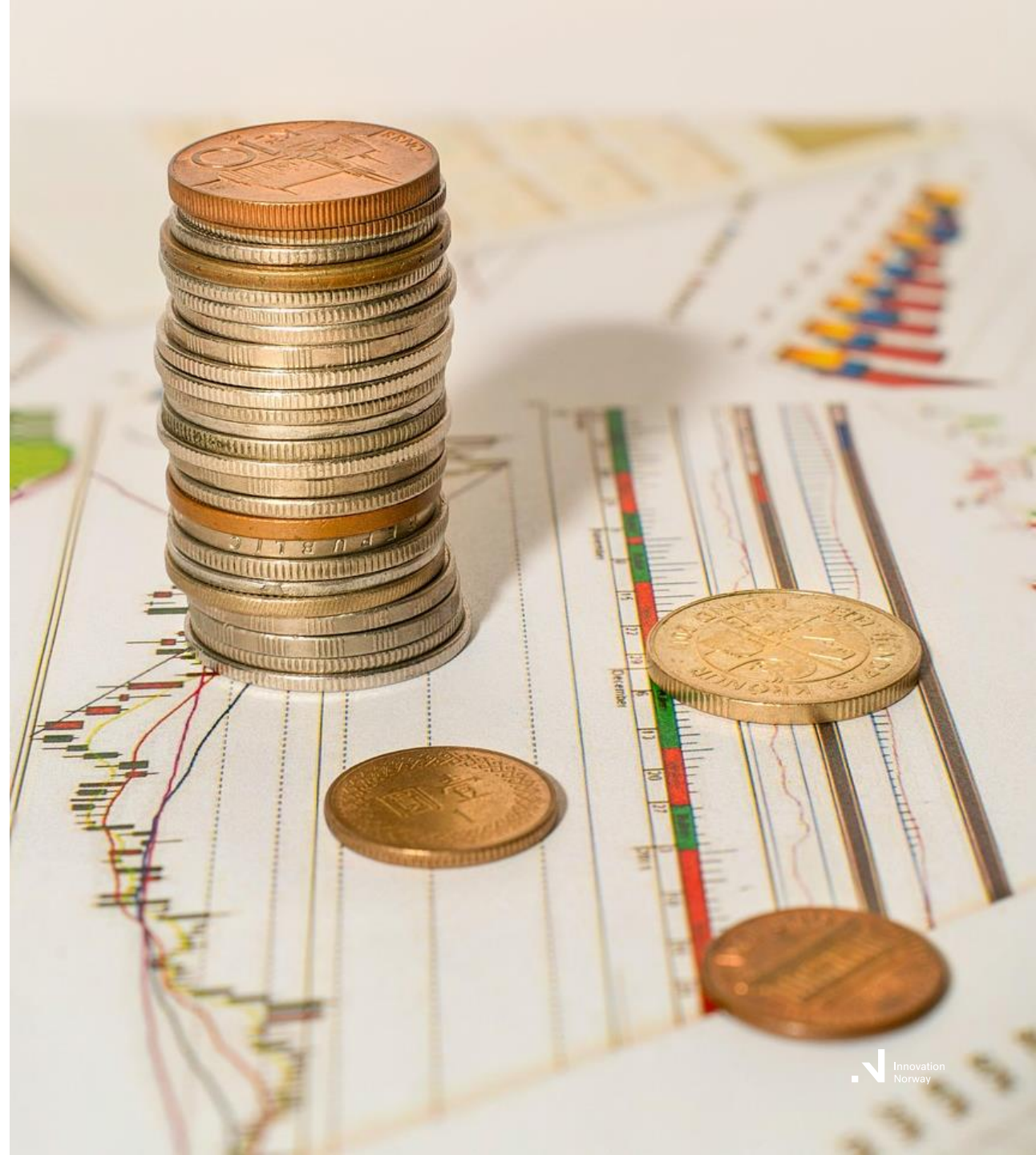
- **Key risks:** high energy prices, geopolitical uncertainty, structural challenges and temporary supply/production constraints

- Source: Bundesbank Monatsbericht [publikatio...desbank.de], MK Prognose [imk-boeckler.de] DIW Berlin Prognose [diw.de], Destatis Pressemitteilung [destatis.de]; ifo Institut Original [ifo.de]; Statista [de.statista.com]



What's on Germany's mind in autumn 2026?

- Economy & cost of living
- Political reforms
- Energy & geopolitics
- Climate & infrastructure (e.g. historic low water levels)
- AI & digital transformation



Travel trade situation DACH

Executive summary

Five messages Norwegian suppliers should remember

01

Demand is resilient

Travel remains a priority, but customers plan more carefully.

02

Value beats price

Clear inclusions and strong differentiation are essential.

03

Booking is polarised

Very early and very late bookings coexist.

04

Digital discovery accelerates

77% of trips include an online-booked component; AI is entering planning.

05

Norway fits the growth themes

Coolcation, rail, soft adventure and shoulder seasons.

A large, mature and highly intermediated market

Germany combines high travel intensity with a strong organised travel sector

67.7m

Holiday trips of 5+ days
2025

57.1m

Holiday travellers
2025

80.5%

Travel intensity
2025

2,300

Tour operators
Germany

49.4%

Organised market share
€43.4bn

10.7%

Product portals
€9.4bn

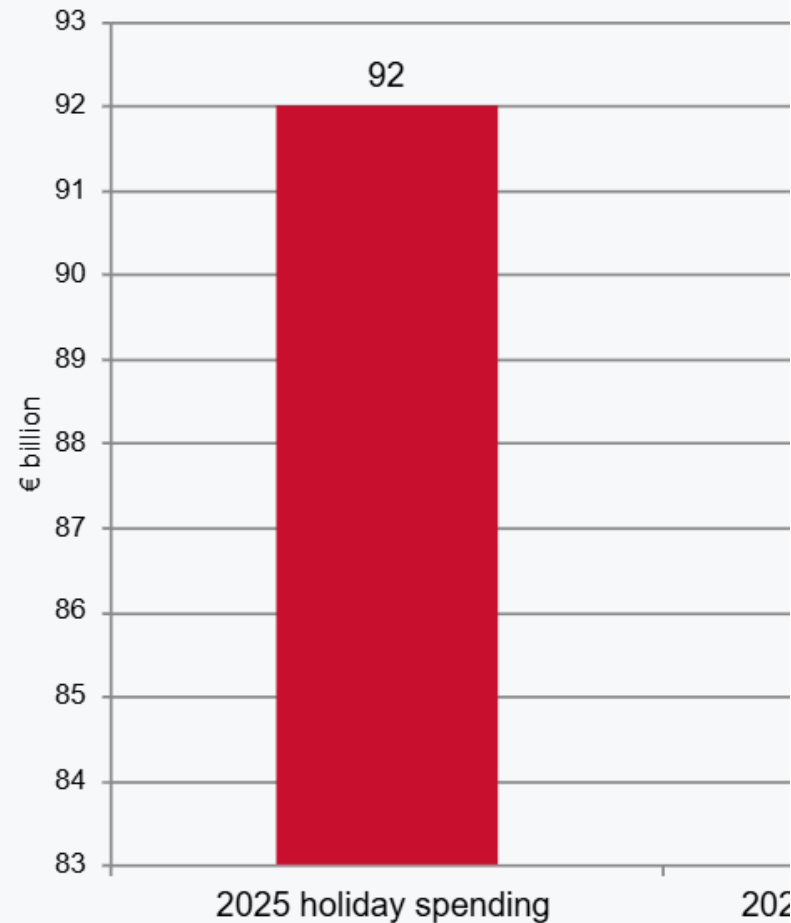
39.9%

Direct suppliers
€35.1bn

More than 50% of German organiser trips are booked in a travel agency.

Travel remains a priority

Spending rises even when traveller volumes flatten



“Travel remains a central need for many people, even when they plan more cost-consciously.”

Albin Loidl, DRV President

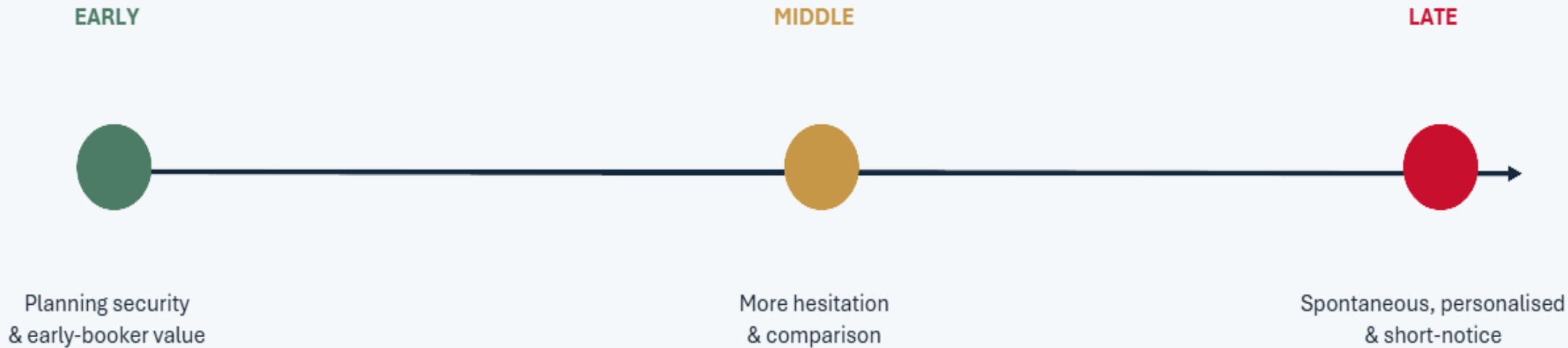
- 2026 DRV forecast: +3% travel spending
- Traveller volume: broadly stable
- Economic and geopolitical uncertainty still shapes decisions

Booking behaviour is becoming more polarised

Early commitment and short-notice spontaneity exist side by side

“They book either very early or rather late, and autumn is more popular.”

DACH Tour Operator Survey 2026



Price sensitivity is rising, but value still converts

The task is to make Norway's premium visible and understandable

“The more expensive trips become, the more sensitive customers become.”

Sabine Brinkmann, Briotours

Show what is included

Meals, transfers, equipment, guiding

Reduce perceived risk

Clear cancellation and weather policies

Prove distinctiveness

Local access, hosts, scenery, know-how

Offer price architecture

Good / better / best, not one expensive option

Six demand trends that favour Norway

The strongest opportunities combine climate, nature, meaning and convenience

01

Coolcation

Cooler climates, fresh air, nature

02

Shoulder seasons

Better value, fewer crowds

03

Soft adventure

Hiking, cycling, kayaking, wildlife

04

Rail & low-friction mobility

Scenic travel and no-car itineraries

05

Authenticity

Food, culture, hosts and local stories

06

Wellbeing & slow travel

Nature immersion and recovery

Shoulder seasons are moving into the mainstream

Autumn is no longer only a niche extension to summer

“In October, November and December, we see clear double-digit booking growth.”

Nina Hammer, HolidayCheck travel expert

Norway product ideas

- September hiking + local food
- October colours + culture
- Early winter + northern lights
- Value-led midweek packages

AUTUMN IS A PRODUCT

Build a reason to travel, not only a cheaper season.

Where the trade sees growth opportunities

Products that simplify complexity and make experience value tangible

Self-drive & modular FIT

Strong performance and demand for customised niches

Premium small groups

Higher service, local access and less crowding

Culture + nature

A strong DACH fit, especially outside peak summer

Rail-based round trips

Ameropa expanded Norway itineraries from 12 to 18

Soft adventure

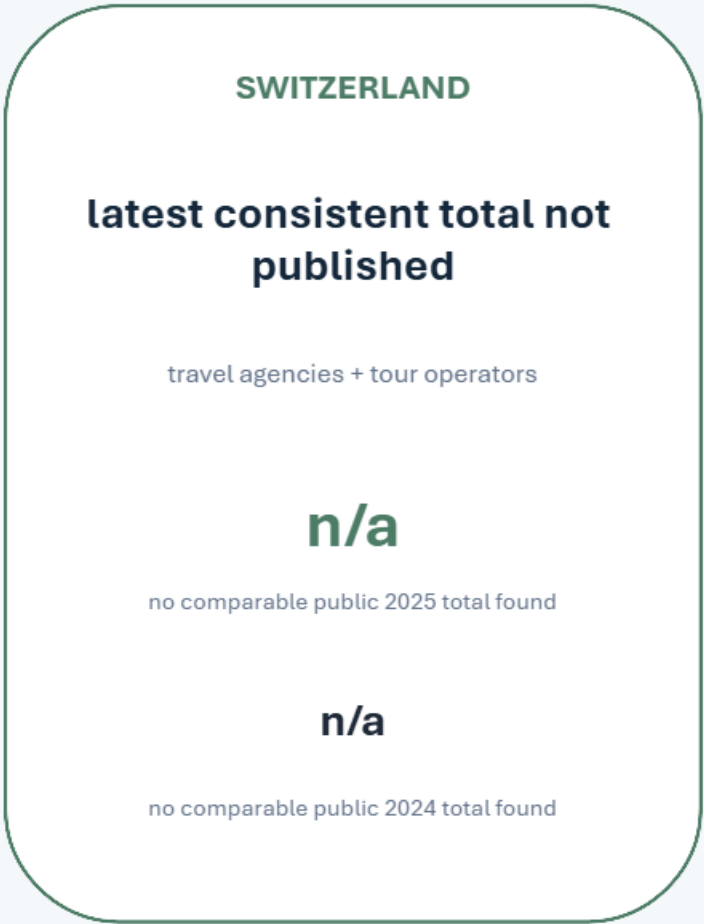
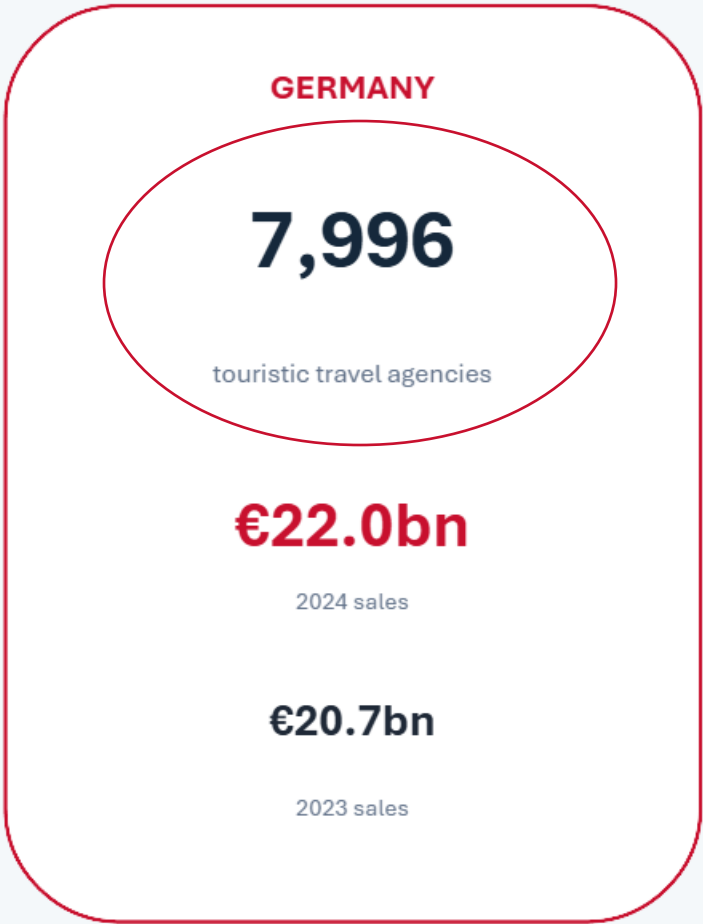
Accessible activity rather than extreme sport

Multi-generational travel

Shared experiences with flexible activity levels

Travel agencies remain commercially relevant across DACH

Latest publicly verifiable figures; years and definitions are not fully harmonised



Important: 2026 is not a completed reporting year. The slide therefore uses the latest completed or officially published figures and flags gaps rather than estimating them.

Use DACH as one region, but not as one customer

These are commercial working hypotheses, to be validated by segment and partner

GERMANY

Scale and channel depth

- Large addressable market
- Strong travel-agency role
- High comparison intensity
- Lead with value and clarity

AUSTRIA

Nature familiarity

- Active and alpine affinity
- Strong organiser relationships
- Compact market
- Lead with novelty and combinations

SWITZERLAND

Premium potential

- Higher-value FIT potential
- Quality and convenience
- Smaller volume
- Lead with exclusivity and service

What the travel trade needs from Norwegian suppliers

Commercial readiness matters as much as product quality

 **Fast response times**

 **Clear net and retail pricing**

 **Reliable availability**

 **Bookable packages**

 **High-quality visual assets**

 **English and German descriptions**

 **Named contact persons**

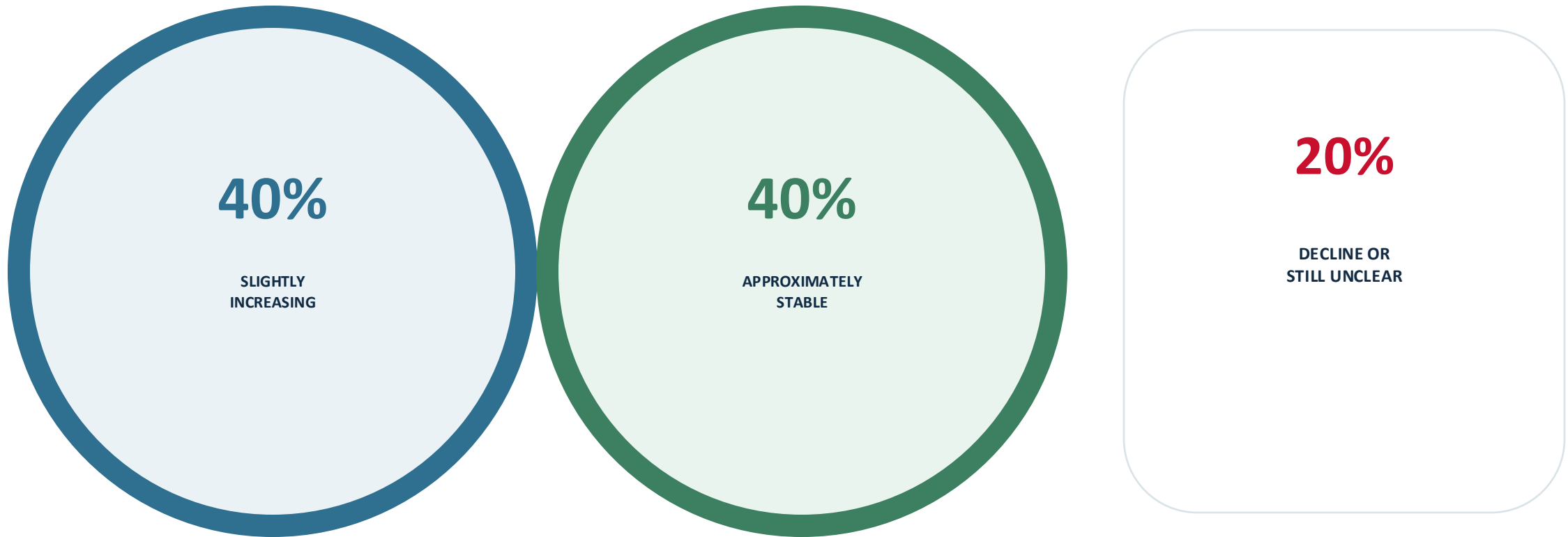
 **Practical access information**

 **Flexible cancellation terms**

 **Sustainability evidence**

The outlook for Norway is cautiously positive

Expectations from Tour operators in DACH for Norway bookings in the coming year



The market does not expect a major downturn, but growth cannot be taken for granted.

Five priorities for converting interest into bookings

Tips from tour operators from DACH: What Norwegian tourism partners can do now

1

Strengthen the value proposition

Demonstrate what customers receive for their travel budget.

2

Make pricing transparent

Help operators explain total trip cost early.

3

Improve accessibility

Competitive air and ferry connections are part of the value equation.

4

Enable faster booking

Later decisions require fast availability, quotations and confirmations.

5

Develop alternatives to hotspots

Use lesser-known regions, shoulder seasons and differentiated experiences.

Turn destination desire into a product customers can justify and operators can sell efficiently.

Sustainability & MICE

SUSTAINABILITY

Aspiration meets price

What 2026 studies reveal about travellers, MICE buyers and society in Germany – and where Norway can score.

Since 1 Jan 2026, tourist vessels under 10,000 GT may only operate emission-free in Norway's World Heritage fjords (ADAC Reisen).



Norway is seen as credibly green

75%

associate Norway with “takes the environment and climate seriously”

Agreement, avg. of six markets, April 2026

Germans choose consciously

German travellers want to make sustainable choices and see Norway as a reliable destination.

Climate shapes travel choices

The climate crisis influences the travel choices of 4 in 10 respondents – especially younger people and families.

But: less concrete action

Willingness to take concrete action for nature and the environment is lower than during the pandemic.

Source: Innovation Norway, Travel Barometer 2026 (Gyger/Epinion), 5,966 interviews in 6 markets, 985 in Germany; fieldwork 25 Mar–7 Apr 2026



Proof, not promises

50

Certified destinations

hold the “Sustainable Destination” label – 64 destinations in 163 municipalities are in the scheme, GSTC-recognised.

2026

Emission-free heritage fjords

Since 1 Jan 2026, tourist vessels under 10,000 GT may only operate emission-free in the UNESCO fjords.

3%

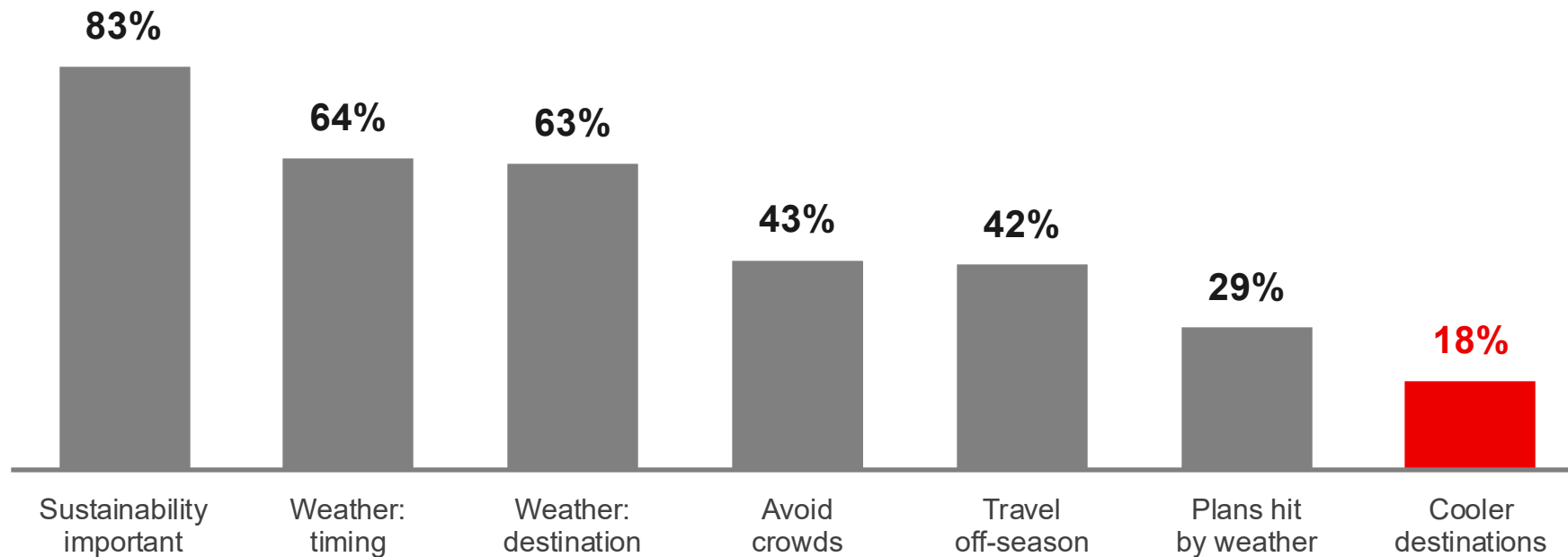
Visitor levy possible

From summer 2026, busy municipalities may charge up to 3% on overnight stays – for local infrastructure.

Sources: Innovation Norway press release, 5 June 2026 · ADAC Reisen, Norway guide 2026

Heat and weather shape travel planning

GERMAN TRAVELLERS · share in %



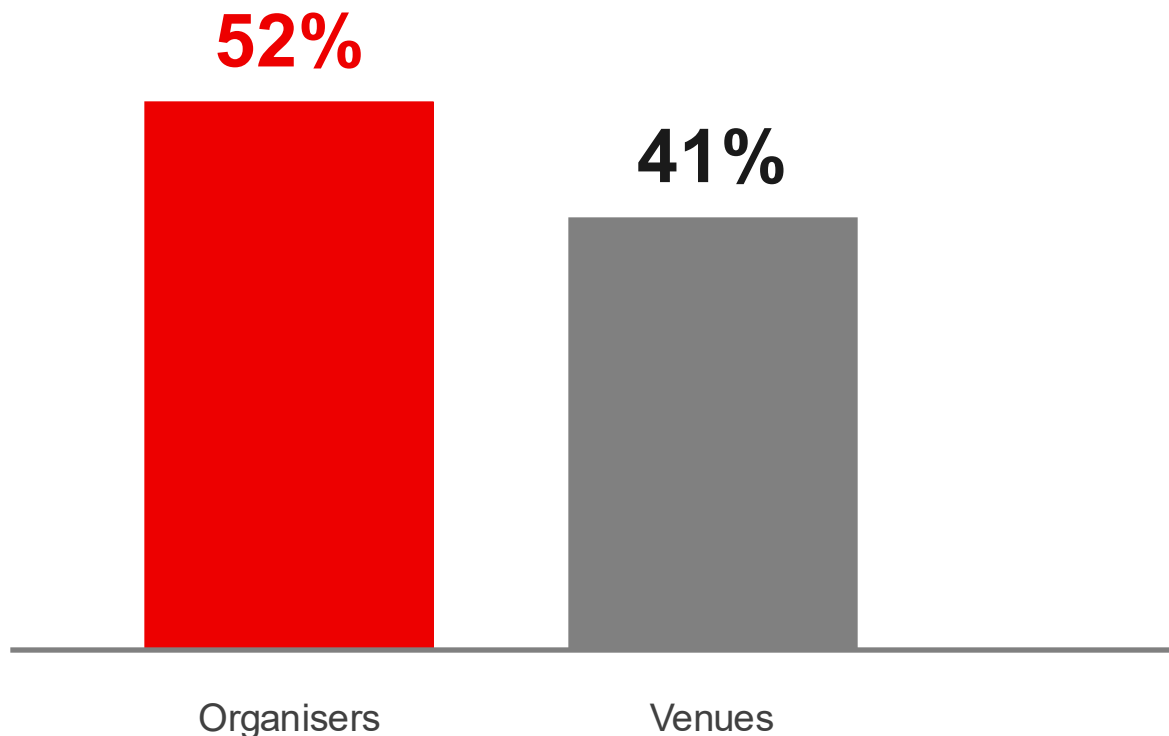
18%

of Germans plan to
visit cooler destinations
in future
Global: 25%

Source: Booking.com, Travel & Sustainability Report 2026 (32,500 respondents in 35 markets; German figures per press release of 28 Apr 2026)

MICE: sustainability becomes a tender criterion

Share that measured the CO₂ emissions of their events in 2025



57%

of companies won't pay extra for sustainable events (2023: 44%)

Required

Certificates, carbon footprints and sustainable procurement become tender conditions

52%

rail share of domestic business trips – cost, CO₂ and productivity decide

Sources: GCB/EVVC/GNTB, Meeting & EventBarometer 2025/26 · MICE Report 2025 · Innovation Norway, German MICE market (May 2026) · VDR Business Travel Analysis 2026

Business travel grows – within Europe

116.1m business trips in 2025
+8.3% despite recession

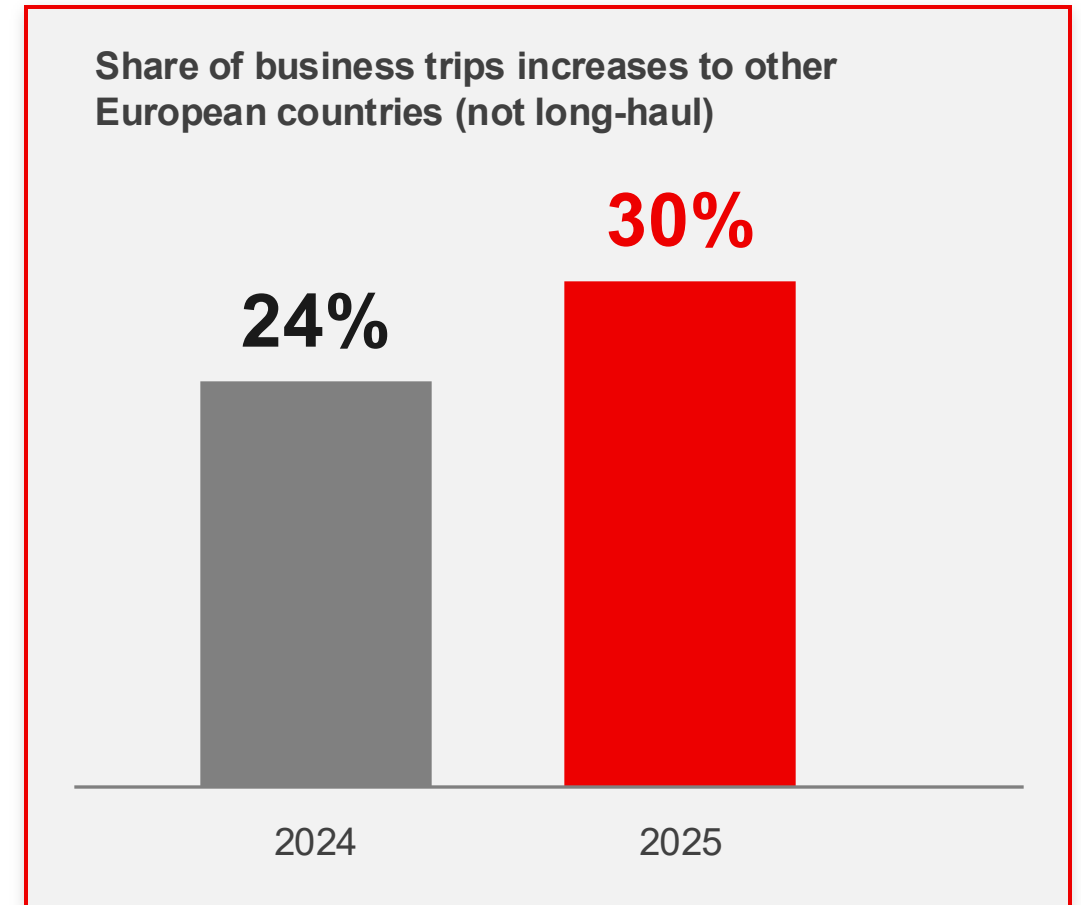
€418 per trip (–4.8%)

€48.6bn total spending 2025

52% rail share domestically (air 13%)

62% expect growth in 2026

Blended travel is well-established.



German outbound MICE 26/27

Europe gains importance, but value & efficiency are key

Europe is on the rise

Cost pressure remains high

59% of German companies cite price increases as a major burden, **47% geopolitical risks** and **44% reduced budgets**.

MICE budgets remain resilient

Value over volume

63% of planners globally name **attendee engagement** as their primary event-success KPI, while 72% expect event costs to rise.

Experience matter

Key incentive-program design factors include **perceived value 56%**, **unique experiences 55%** and **flexibility 55%**.

Opportunity for Norway

Growing European mobility + demand for high-impact experiences creates an opportunity for distinctive, experience-led MICE destinations like Norway

Sources: ¹ VDR-Geschäftsreiseanalyse 2026 / VDR-Stimmungsbarometer 2026 (Germany); ² Amex GBT Global Meetings & Events Forecast 2026 (Europe); ³ Cvent Global Planner Sourcing Report 2026 (global); ⁴ IRF European Top Performers Study 2026 (Europe). vdr-service.de, vdr-service.de, stnet.ch, cvent.com, theirf.org

General information B2B

Work in D A CH

Economy

B2B D-A-CH events 2027

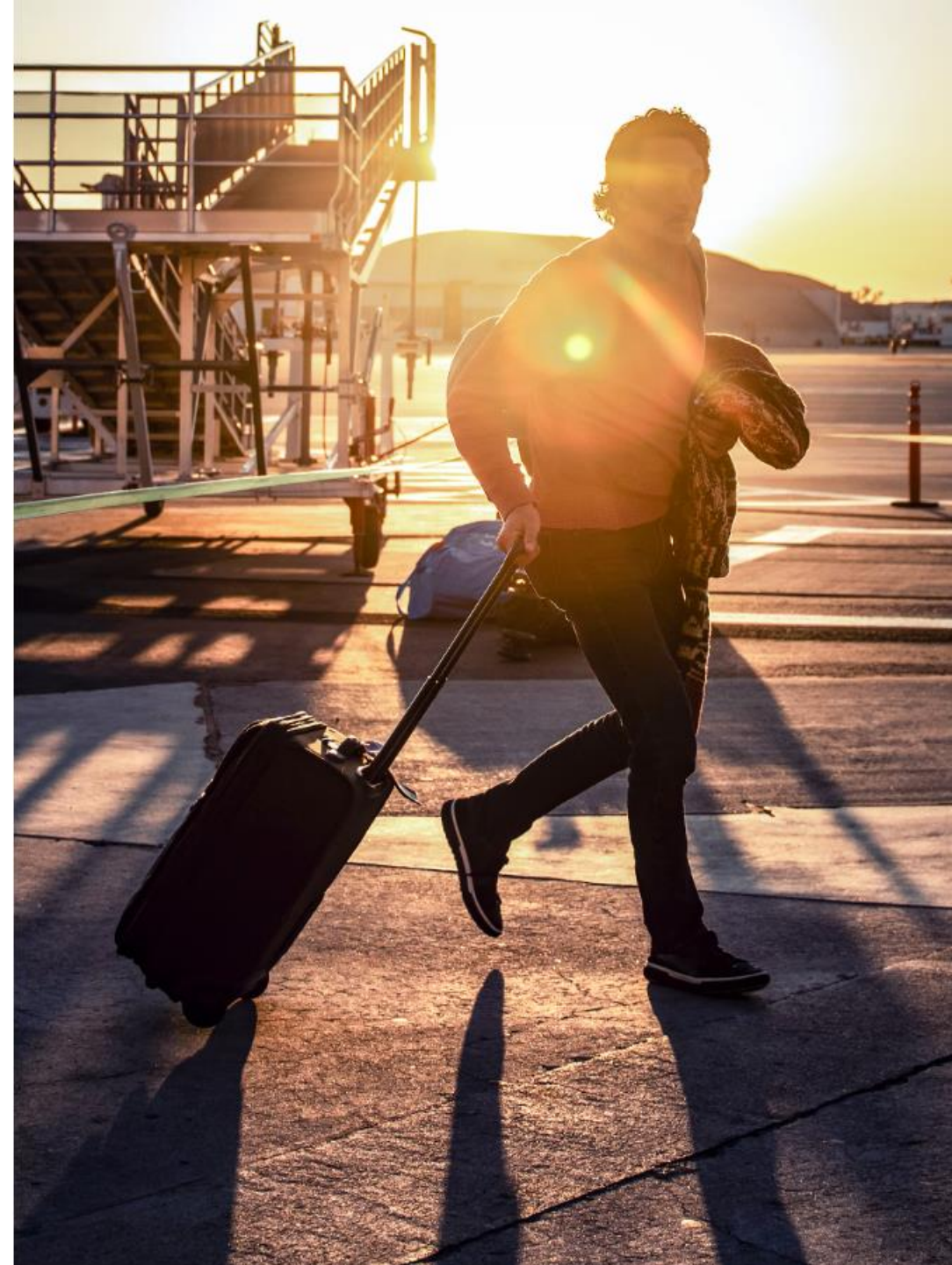
- ITB Berlin 2027, March
- Norwegian Travel Workshop with appr. 40 tour operators from DACH, April
- Travel agent event winter season in Austria, May
- Nordic Workshop in Hamburg, September
- Digital Day of Competence, September
- Travel trade event “Flavours & Market insight Workshop”, November in Dresden

MICE Events:

- Best of Events (BOE), Dortmund, January (tbc)
- Illerhaus MICE industry meeting, Hamburg, February (tbc)
- MCE North & Middle Europe, Hamburg, April (tbc)
- MICE Roadshow, 2 German MICE-city-hubs
- Meet Germany summits Munich, North-Rhine-Westphalia
- MICE Famtrip DACH markets

Please find our activity calender here:

<https://reiseliv.innovasjon Norge.no>



Grab a coffee & study our latest reports

You will find fresh reports here:

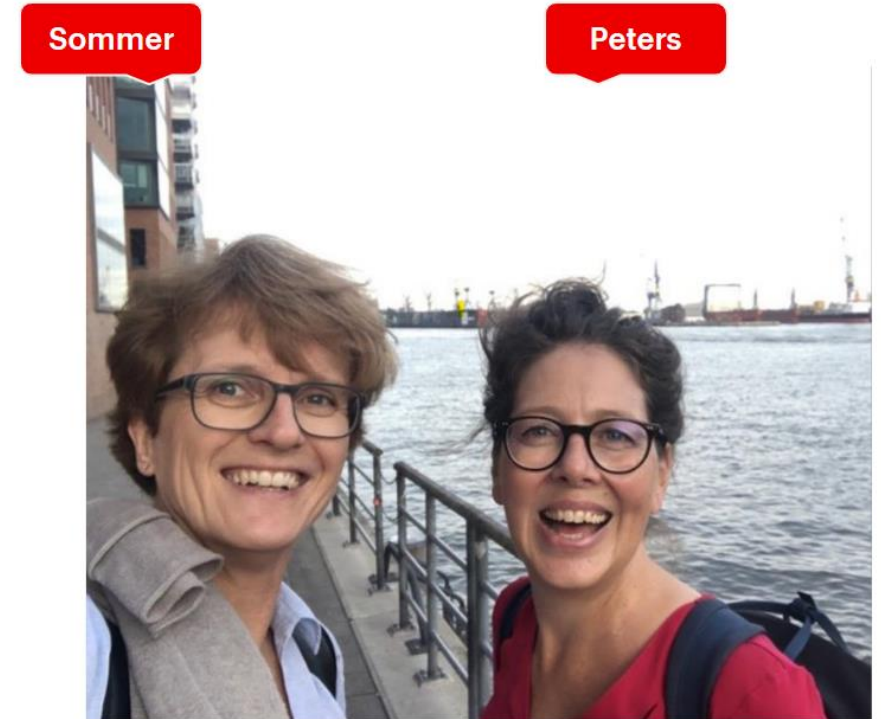
business.visitnorway.com



Ta gjerne kontakt med oss i Hamburg!

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Sources

Key market data, research and trade-media references

Official statistics & research

- German Travel Association (DRV), The German Travel Market: Facts and Figures 2025, published 2026
- Forschungsgemeinschaft Urlaub und Reisen (FUR), Reiseanalyse 2025/2026
- Verband Internet Reisevertrieb (VIR), Data & Facts on the Online Travel Market 2026
- Austrian Federal Economic Chamber (WKO), Travel Agency Industry Statistics, May 2026
- Swiss Travel Association (SRV), Annual Report 2024/25

Industry intelligence & internal sources

- Federal Statistical Office of Germany (Destatis) and Eurostat
- Federal Association of the German Tourism Industry (BTW)
- fww | TravelTalk, Touristik Aktuell, Reise vor9 and Counter vor9
- Internal DACH Tour Operator Survey 2026 and Visit Norway market updates
- Direct quotations should be checked against the original article/interview before external publication

Data note: DACH country figures use the latest publicly available reporting periods. Definitions differ by country, so direct comparisons should be interpreted with care.