

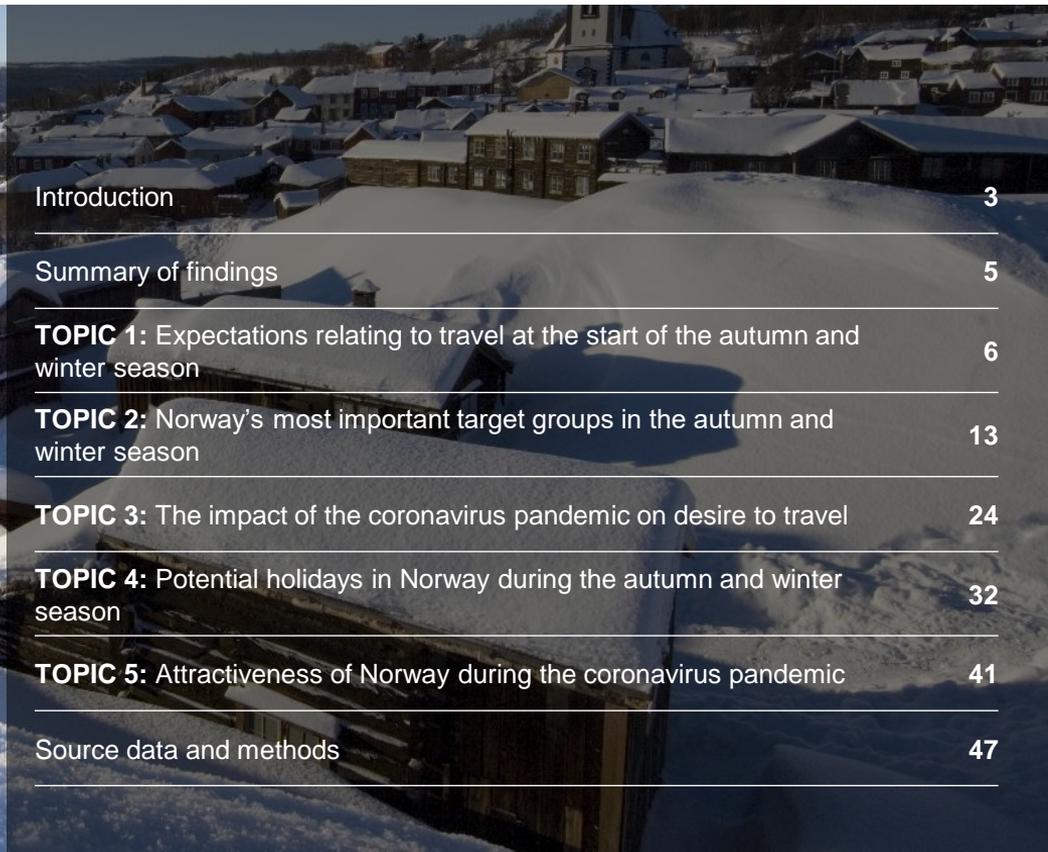
# Coronavirus Barometer – autumn and winter 2020/21

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Survey carried out in the United Kingdom, Germany, Sweden,  
Denmark, the Netherlands, and France in weeks 36 to 38, 2020

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Report – Innovation Norway



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# Introduction

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## BACKGROUND

The coronavirus crisis has turned Norwegian tourism on its head, and the tourism industry is facing a demanding autumn and winter season. This is why it is more important than ever to update the information on the options available in order to persuade tourists from important local markets to visit Norway when the situation permits.

Innovation Norway has initiated a Coronavirus Barometer with the aim of providing regular insights into the general desire to travel and attitudes to holidays in Norway in six of the main European markets. The results of the first survey completed in September 2020 are presented in this report.

The report has been prepared by Epinion and Gyger in partnership with Innovation Norway. Please feel free to get in touch with the undersigned if you have any queries.

We hope you enjoy reading the report!

Margrethe Helgebostad  
Innovation Norway

## DATA AND READER GUIDE

The analysis is based on interviews with 1000 potential travellers\* in Germany, France, the United Kingdom, the Netherlands, Sweden, and Denmark. The results provide a snapshot of expectations between 2 and 21 September. The situation is changing constantly, and this will impact the results.

In the report, we wish to highlight areas where there are substantial differences between markets. We will show collective figures for areas where the results are the same across markets. The report focuses in particular on people who state that they expect to travel abroad in autumn/winter.

### \* The target group surveyed:

The survey is based on interviews with potential travellers. Potential holidaymakers are defined as holidaymakers who have travelled for holiday or leisure purposes over the last three years and who also state that they are interested in holidaying abroad over the next three years. The interviews are limited geographically to the areas listed on page 8.



# Summary of findings



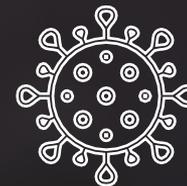
Despite the coronavirus situation, quite a few people are still considering travelling in the autumn and winter season.



Although people who are keen to travel are less concerned about infection, most people are awaiting developments before they book their trips. It is important for them to be able to get refunds for any cancelled trips.



Norway is an attractive holiday destination, but only 1 in 3 potential tourists is aware of what Norway has to offer in autumn and winter.



Coronavirus has made all destinations less attractive, but Norway is one of the least-impacted countries.

## Main points per market

### UK

The desire to travel among British tourists is on par with the average. Southern Europe is the most popular destination, but Norway comes out on top of all the countries in northern Europe. British tourists are worried about coronavirus, and the potential challenge for Norway is that they are extremely worried about travelling by air.

### Germany

German tourists are still keen to travel, but their favourite destinations in autumn/winter are their neighbouring countries of Austria, the Netherlands, and southern Europe. Just under 1 in 10 potential tourists is considering Norway in autumn/winter. German tourists are generally less concerned about coronavirus infection on holiday. Their greatest concern relates to travelling by coach, rail, and air.

### France

Despite the coronavirus pandemic, the French largely consider Norway to be one of the more attractive destinations, and almost 1 in 5 tourists is considering or planning a trip to Norway in autumn/winter. The attractiveness of Norway has increased in France during the pandemic. French tourists are particularly worried about being stranded in a foreign country or ending up in quarantine if they travel abroad.

### Netherlands

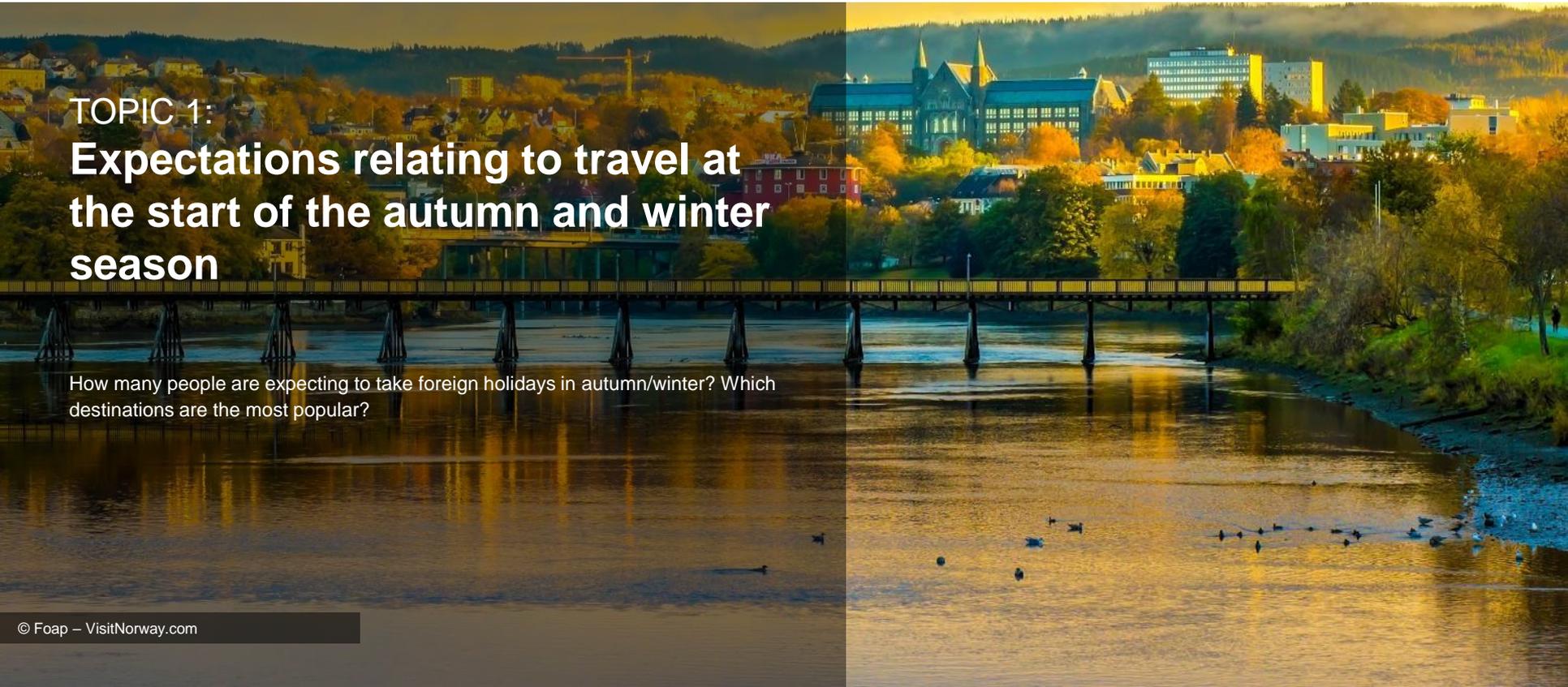
Norway is one of the most attractive destinations for tourists from the Netherlands in autumn/winter. Almost 1 in 5 potential tourists is considering visiting Norway. The Northern Lights and experiencing nature are what arouse their interest. Tourists from the Netherlands are generally not worried about infection on holiday, but it is important for them to be able to travel by car and to be able to buy a complete package if they are going to travel.

### Denmark

The desire to travel among Danes in autumn/winter is generally low, and the ones who wish to travel are primarily considering Germany. Danish tourists will await developments in the coronavirus pandemic before booking trips in autumn/winter. The percentage of people considering skiing holidays abroad appears to be unchanged, but 1 in 4 Danes considers Norway to be a less attractive destination during the coronavirus pandemic.

### Sweden

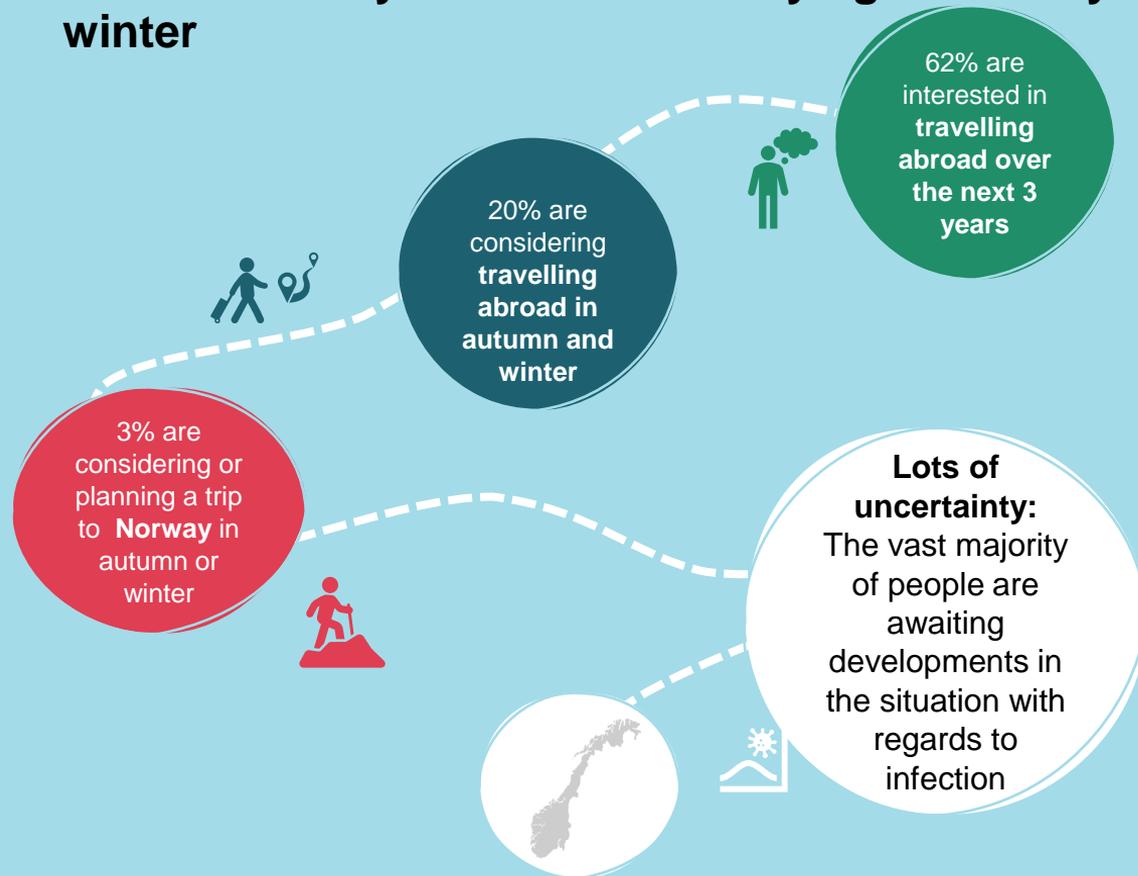
The percentage of the population that is expecting to travel in the future has remained largely unchanged from before the coronavirus outbreak in Sweden. However, not many Swedish tourists are expecting to travel abroad in autumn/winter, and those who are considering travelling want to head for the warmer climate of southern Europe. The recommendations of the authorities are crucial to whether or not Swedes wish to travel.



TOPIC 1:  
**Expectations relating to travel at  
the start of the autumn and winter  
season**

How many people are expecting to take foreign holidays in autumn/winter? Which destinations are the most popular?

# There are many barriers to holidaying in Norway in autumn and winter



## Many have a desire to travel abroad, some of them in autumn and winter

Between 56% and 65% of the adult population have holidayed abroad over the last three years and are interested in travelling abroad again over the next three years. Between 16% and 23% are considering travelling abroad in autumn and winter.

## Relatively great interest in Norway in autumn and winter

There is quite a lot of interest in Norway among the 20% of people wishing to travel. Norway is perceived to be a more attractive destination than many other countries at the moment.

## Major uncertainty among people considering Norway

Even among people who are actively considering travelling to Norway in autumn and winter, 8 out of 10 are adopting a wait-and-see approach and awaiting developments in the situation as regards infection. At the same time, 7 out of 10 state that they will only book travel with businesses that they can rely on, and where they can get their money back if they have to cancel or if the trip is cancelled.

## This report considers different target groups: Follow their icons and colours throughout the report

- The survey was conducted among the target group of people who are interested in holidaying abroad over the next three years (marked green on the right). The percentage of the population wishing to travel is lower than it was prior to coronavirus (see the section entitled Source data and methods).
- This report focuses in particular on tourists who are considering or planning a holiday abroad in autumn and winter (marked blue on the right)
- In places, there is emphasis on the target group that is considering planning travelling to Norway in autumn/winter (marked red)

### Overview of target groups in the survey



Entire population



Potential tourists who would consider holidaying abroad over the next 3 years if the situation so permits (the main target group for the survey)



Tourists who are considering or planning travel abroad in the autumn and winter season



Tourists who are considering or planning travel to Norway in the autumn and winter season

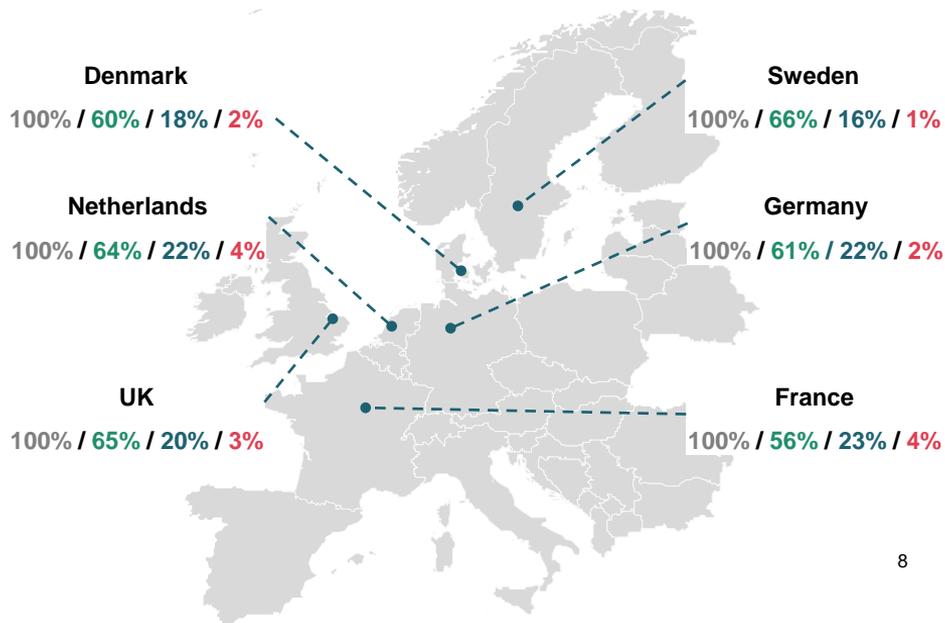
### Geographical areas where data collection/interviews have taken place

**Sweden, Denmark and Netherlands:** Nationally.

**UK:** Bedfordshire and Hertfordshire, Berkshire, Buckinghamshire and Oxford shore, 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



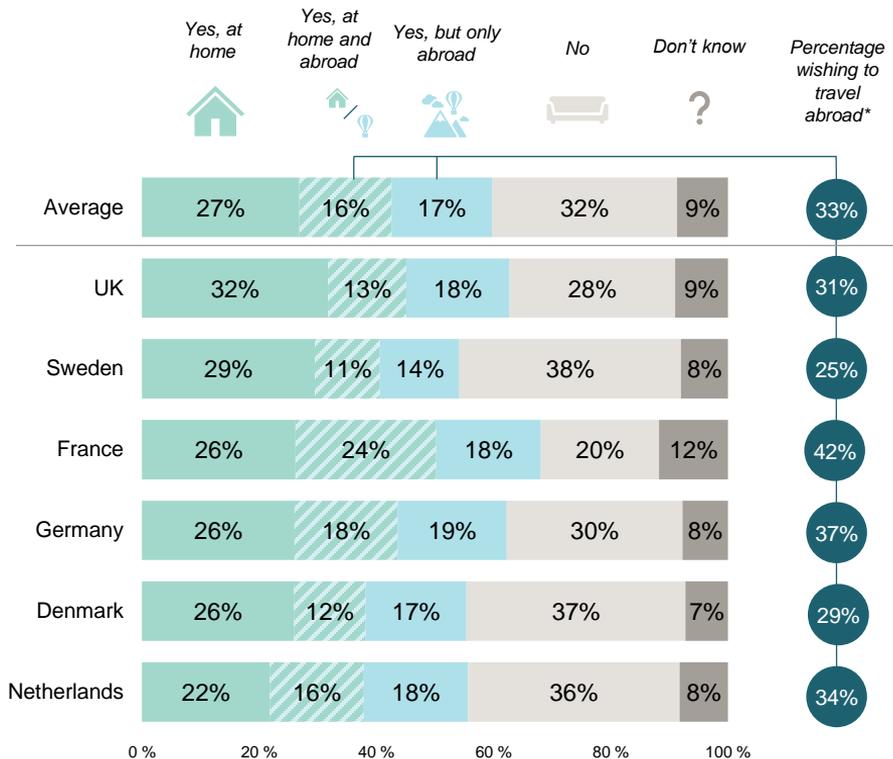
## There are major differences between the markets with respect to the extent to which the people who normally travel are considering travelling abroad in autumn and winter

- Many people are considering or planning holidays in their own countries in autumn and winter.
- At the same time, there is a large group of people across markets who are expecting to or at least considering travelling abroad in autumn/winter.



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

At the current time, are you planning to or are you considering taking a holiday involving overnight stays in autumn and winter?

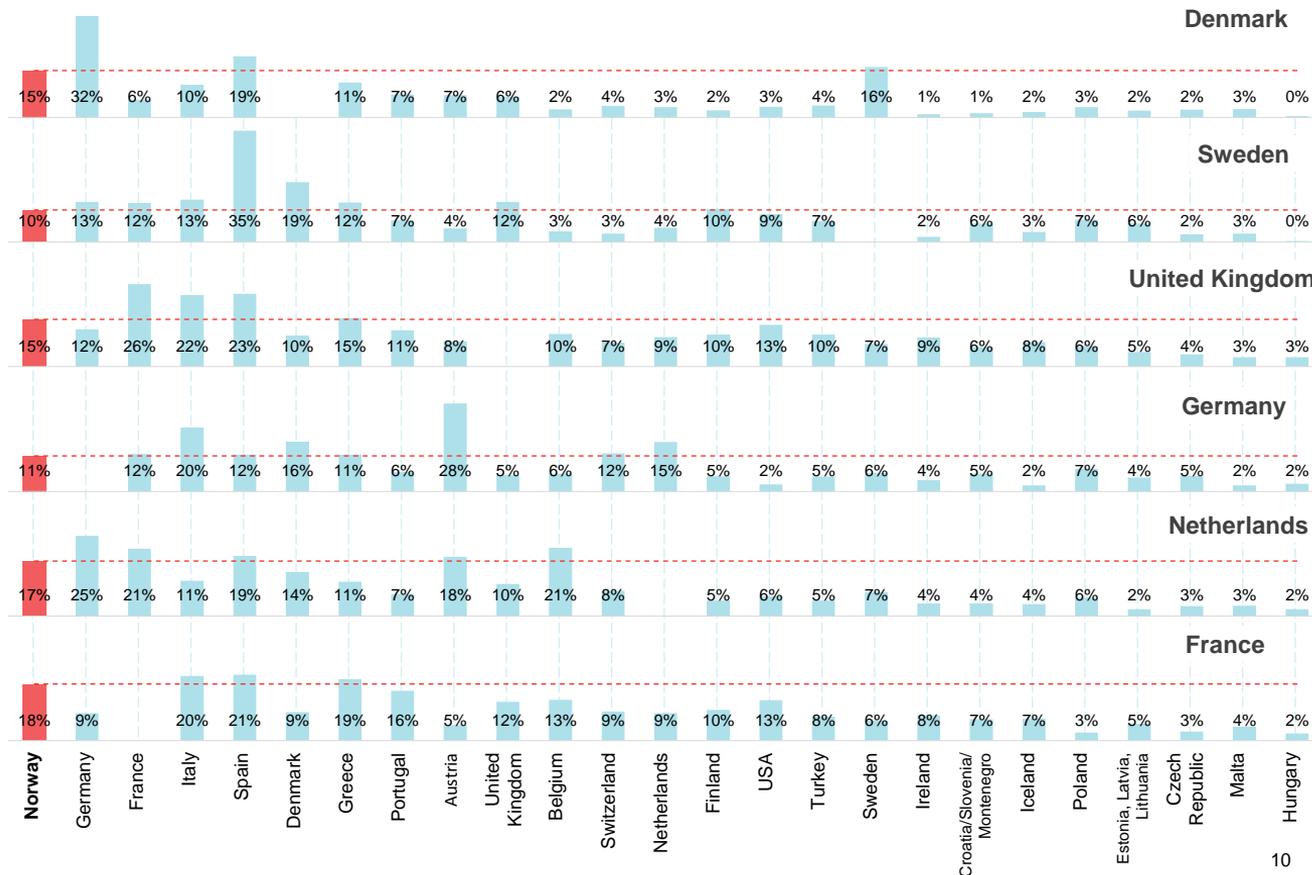


\* This percentage is higher than in slide 8 because we are now looking at the percentage of people who are interested in travelling over the next three years, not the percentage of the population as a whole.

## Which country are you planning to visit or are considering visiting on a holiday/leisure trip this autumn/winter?

Percentages are the number of tourists who are considering or who are planning to travel abroad in autumn/winter

People who are planning to travel abroad have Norway high up on the list of countries they are considering



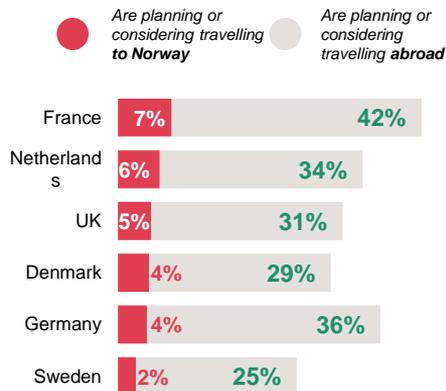
This page looks at people who are *interested in travelling abroad in autumn and winter*

# People who are considering travelling abroad in the autumn and winter season are consistently much less worried

 Considering **traveling** abroad in autumn and winter

 Not **considering traveling** abroad in autumn and winter, but interested in travelling abroad over the next 3 years

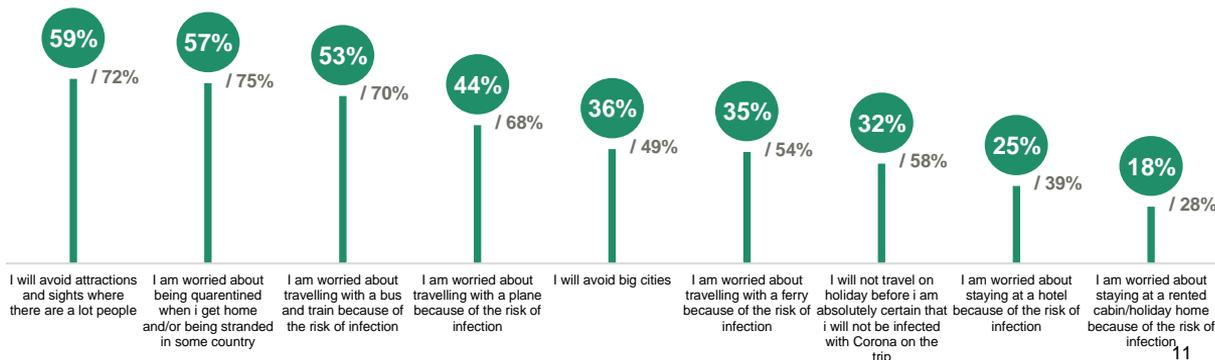
## Norway's share of the market in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?

- #1 General development of infection **55%** / 61%
- #2 That it is possible to travel safely and securely **51%** / 51%
- #3 That it is easy to cancel and get a refund **46%** / 47%
- #4 Travel advice from the authorities **44%** / 42%
- #5 That it is possible to travel where I would like to go **39%** / 28%
- #6 The household's financial situation **23%** / 29%
- #7 That it is possible to take the holiday spontaneously **21%** / 16%
- #8 That it is easy to travel to the destination by car **21%** / 19%

## Travel concerns during the coronavirus pandemic Percentage of "agree" or "agree strongly"



# Well-travelled young men with good incomes are more likely to be considering travel abroad in autumn and winter

 Considering **traveling** abroad in autumn and winter

 Not **considering traveling** abroad in autumn and winter, but interested in travelling abroad over the next 3 years

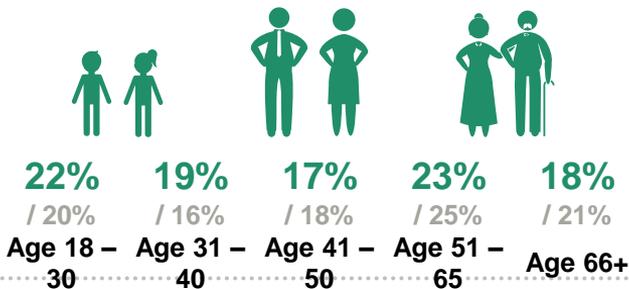
Norway has become **more attractive** during the COVID-19 pandemic



Norway has become **less attractive** during the coronavirus pandemic



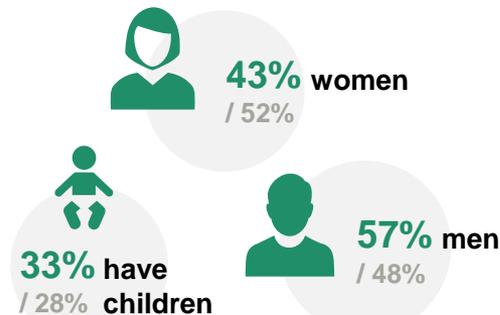
44% / 34%  
Have a **higher income** than average



Have been on holiday in **Norway** over the last three years



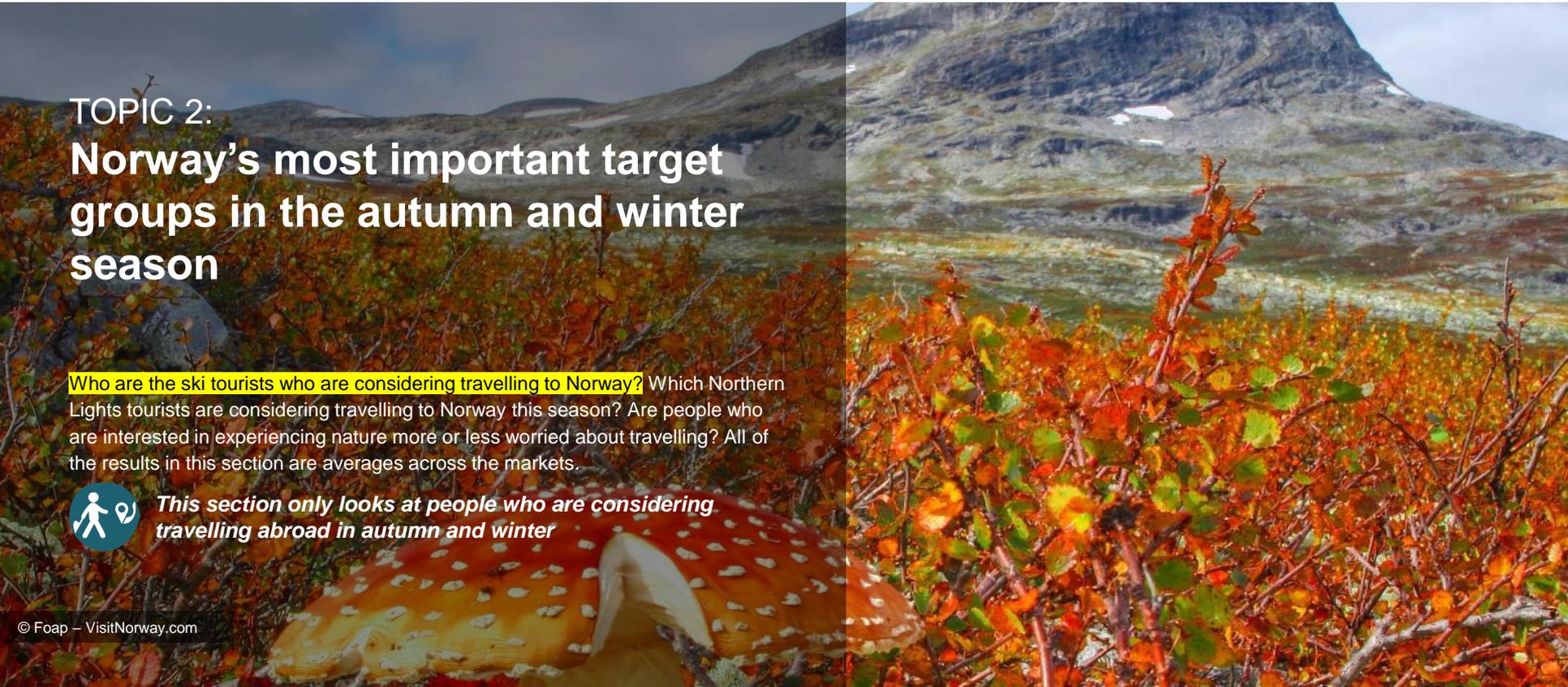
Have been on **holiday abroad more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic



More important to **put together a trip myself** during the coronavirus pandemic



## TOPIC 2: Norway's most important target groups in the autumn and winter season

**Who are the ski tourists who are considering travelling to Norway?** Which Northern Lights tourists are considering travelling to Norway this season? Are people who are interested in experiencing nature more or less worried about travelling? All of the results in this section are averages across the markets.

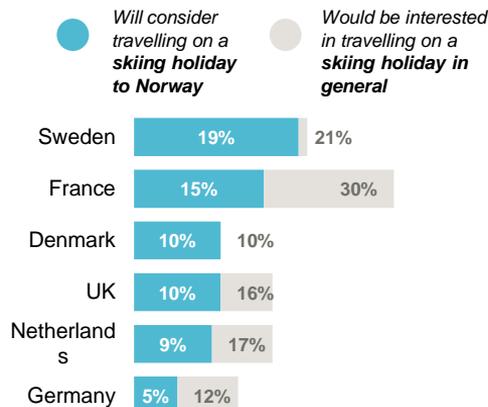


*This section only looks at people who are considering travelling abroad in autumn and winter*

# Potential ski tourists who want to travel to Norway

- Considering **travelling** abroad in autumn and winter on a **skiing holiday**
- Considering **travelling** abroad in autumn and winter, but not on a **skiing holiday**

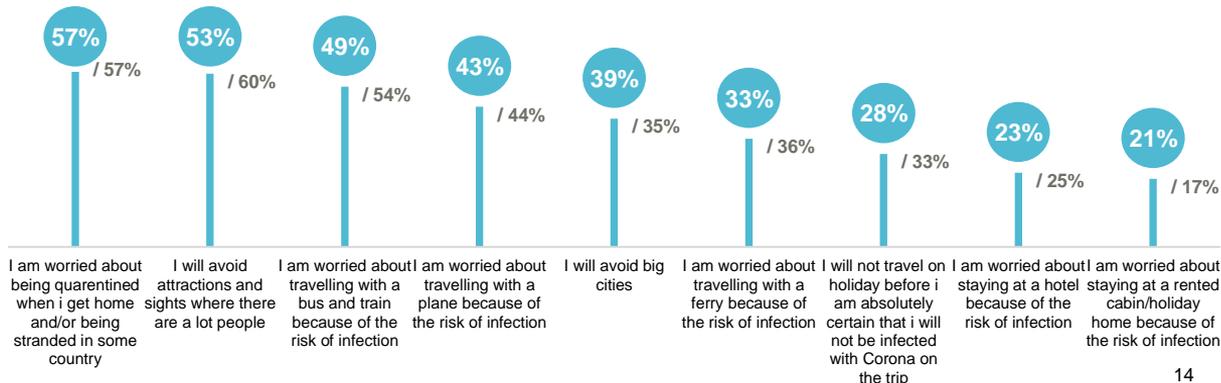
## Norway's share of the market for skiing holidays in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?

- #1 General development of infection **51%** / 56%
- #2 That it is possible to travel safely and securely **45%** / 53%
- #3 That it is easy to cancel and get a refund **44%** / 46%
- #4 Travel advice from the authorities **42%** / 45%
- #5 That it is possible to travel where I would like to go **42%** / 37%
- #6 The household's financial situation **27%** / 21%
- #7 That it is easy to travel to the destination by car **26%** / 20%
- #8 That it is possible to take the holiday spontaneously **22%** / 21%

## Travel concerns during the coronavirus pandemic Percentage who "agree" or "strongly agree" with the statements



# Characteristics of people who are considering skiing experiences abroad in autumn/winter

Norway has become **more attractive** during the coronavirus pandemic



Norway has become **less attractive** during the coronavirus pandemic

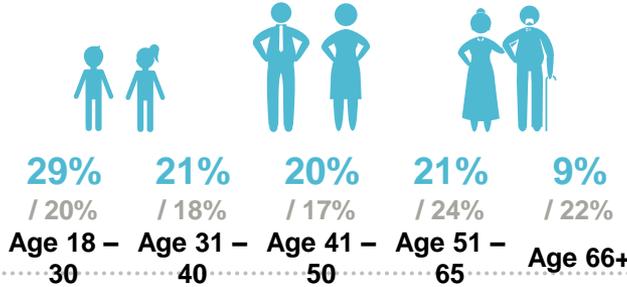


52% / 41%  
Have a **higher income** than average

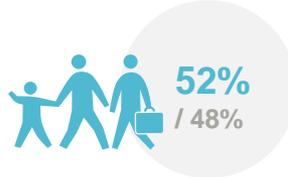


Considering **travelling** abroad in autumn and winter on a **skiing holiday**

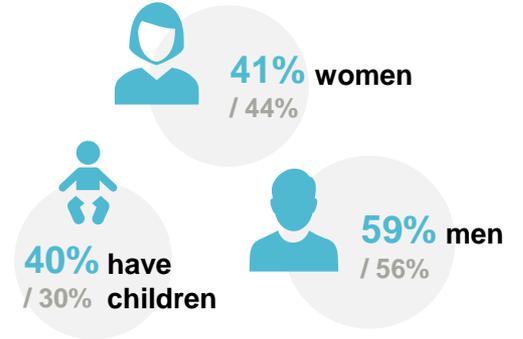
Considering **travelling** abroad in autumn and winter, but not on a **skiing holiday**



Have been on holiday in **Norway** over the last three years



Have been on holiday **more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic



More important to **put together a trip myself** during the coronavirus pandemic

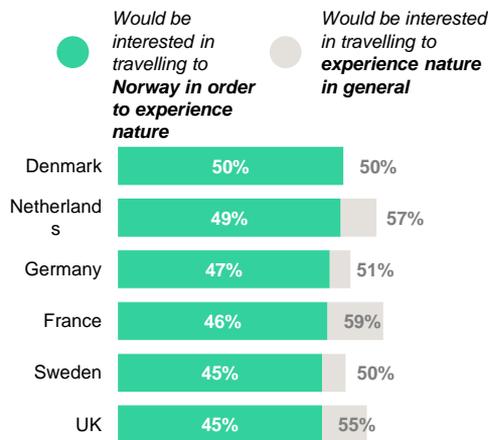


# Potential tourists to Norway who want to experience nature

 Considering **travelling** abroad in autumn and winter *In order to experience nature*

 Considering **travelling** abroad in autumn and winter, *but not to experience nature*

## Norway's share of the nature experience market abroad in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?

- #1** General development of infection **57%** / 53%
- #2** That it is possible to travel safely and securely **54%** / 48%
- #3** Travel advice from the authorities **47%** / 41%
- #4** That it is easy to cancel and get a refund **46%** / 44%
- #5** That it is possible to travel where I would like to go **42%** / 35%
- #6** That it is easy to travel to the destination by car **24%** / 18%
- #7** That it is possible to take the holiday spontaneously **23%** / 19%
- #8** The household's financial situation **23%** / 23%

## Travel concerns during the coronavirus pandemic



# Characteristics of people who are considering travelling abroad to experience nature in autumn/winter

 Considering **travelling** abroad in autumn and winter to experience nature

 Considering **travelling** abroad in autumn and winter, but not to experience nature

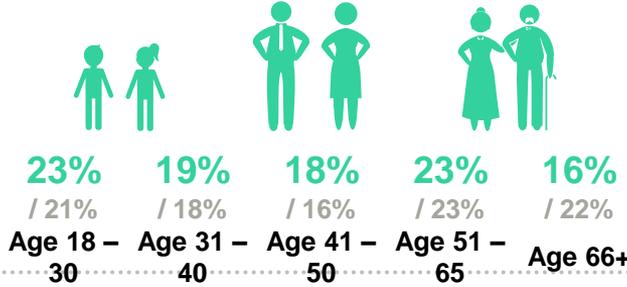
Norway has become **more attractive** during the coronavirus pandemic



Norway has become **less attractive** during the coronavirus pandemic



43% / 45%  
Have a **higher income** than average



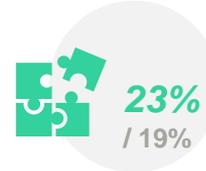
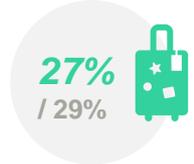
Have been on holiday **in Norway** over the last three years



Have been on holiday **more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic

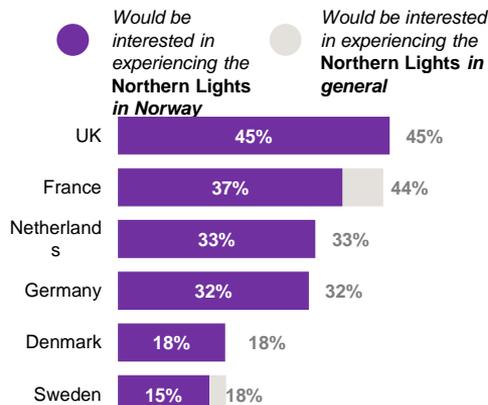


More important to **put together a trip myself** during the coronavirus pandemic

# Potential Northern Lights tourists who want to travel to Norway

-  Considering **travelling** abroad in autumn and winter in order to experience the **Northern Lights**
-  Considering **travelling** abroad in autumn and winter, but not for the **Northern Lights**

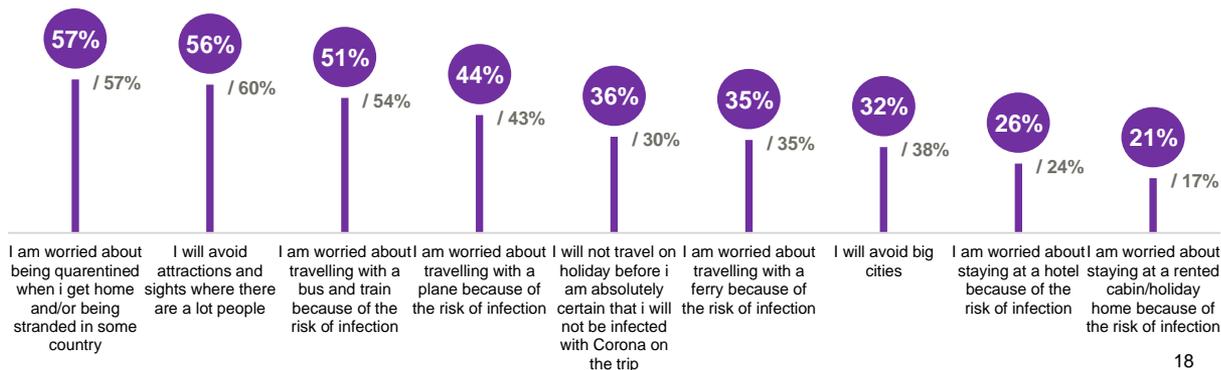
## Norway's share of the market for Northern Lights experiences in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?

- #1** General development of infection **55%** / 54%
- #2** That it is possible to travel safely and securely **50%** / 51%
- #3** That it is easy to cancel and get a refund **45%** / 46%
- #4** Travel advice from the authorities **45%** / 44%
- #5** That it is possible to travel where I would like to go **42%** / 37%
- #6** The household's financial situation **28%** / 21%
- #7** That it is possible to take the holiday spontaneously **27%** / 20%
- #8** That it is easy to travel to the destination by car **22%** / 21%

## Travel concerns during the coronavirus pandemic Percentage who "agree" and "strongly agree" with the statements



# Characteristics of people who are considering Northern Lights experiences abroad in autumn/winter

● Considering **travelling** abroad in autumn and winter in order to experience the Northern Lights

● Considering **travelling** abroad in autumn and winter, but not to experience the Northern Lights

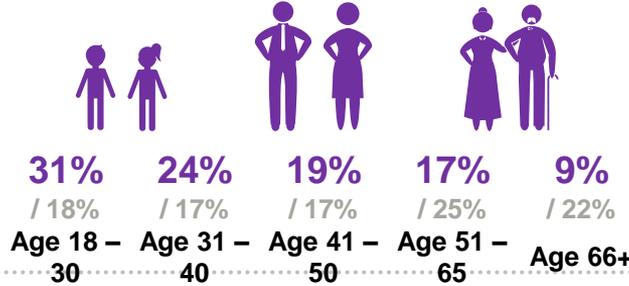
Norway has become **more attractive** during the coronavirus pandemic



Norway has become **less attractive** during the coronavirus pandemic



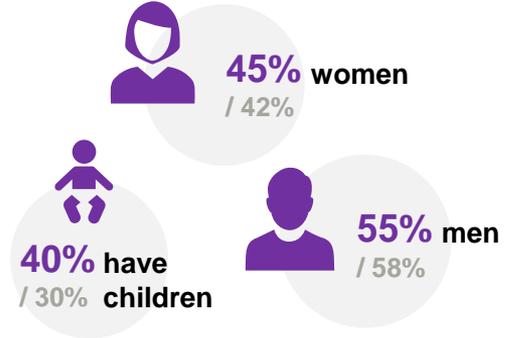
43% / 44%  
Have a **higher income** than average



Have been on holiday **in Norway** over the last three years



Have been on holiday **more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic

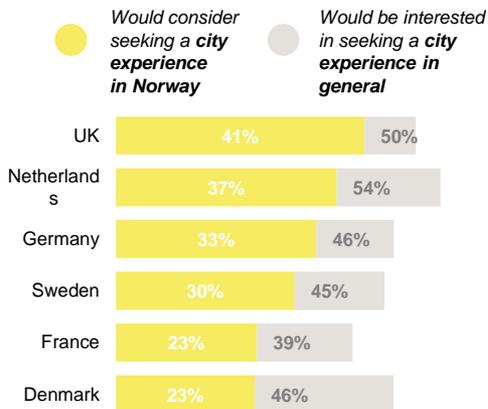


More important to **put together a trip myself** during the coronavirus pandemic

# Potential tourists who want city experiences in Norway

-  Considering **travelling for city experiences** abroad in autumn and winter
-  Considering **travelling** abroad in autumn and winter, but not for a **city experience**

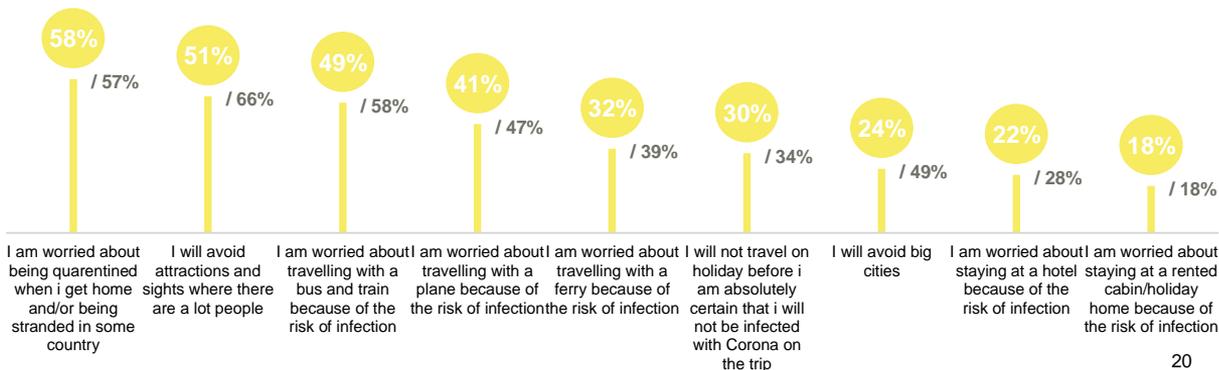
## Norway's share of the market for city experiences in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?

- #1** General development of infection **54%** / 56%
- #2** That it is possible to travel safely and securely **51%** / 52%
- #3** That it is easy to cancel and get a refund **47%** / 44%
- #4** Travel advice from the authorities **45%** / 44%
- #5** That it is possible to travel where I would like to go **42%** / 35%
- #6** The household's financial situation **24%** / 21%
- #7** That it is possible to take the holiday spontaneously **23%** / 19%
- #8** That it is easy to travel to the destination by car **19%** / 24%

## Travel concerns during the coronavirus pandemic Percentage who "agree" and "strongly agree" with the statements



# Characteristics of people who are considering a city experience abroad in autumn/winter

● Considering **travelling** abroad for a **city experience** in autumn and winter

● Considering **travelling** abroad in autumn and winter, but not for a **city experience**

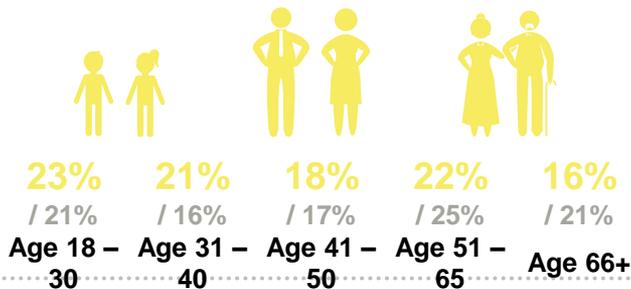
Norway has become **more attractive** during the coronavirus pandemic



Norway has become **less attractive** during the coronavirus pandemic



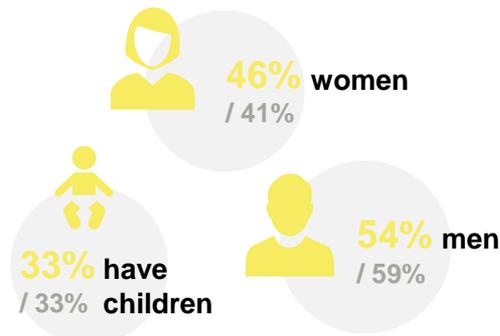
42% / 46%  
Have a **higher income** than average



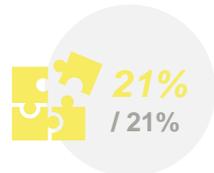
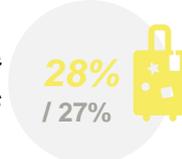
Have been on holiday **in Norway** over the last three years



Have been on holiday **more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic



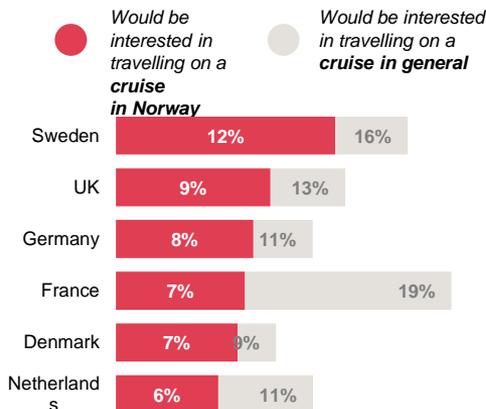
More important to **put together a trip myself** during the coronavirus pandemic

# Potential cruise tourists who want to travel to Norway

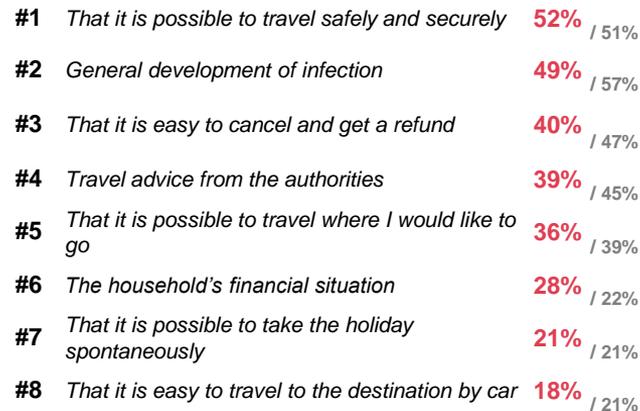
● Considering **travelling** abroad on a **cruise** in autumn and winter

● Considering **travelling** abroad in autumn and winter, but not on a **cruise**

## Norway's share of the market for cruises in autumn/winter



## What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter?



## Travel concerns during the coronavirus pandemic Percentage who "agree" and "strongly agree" with the statements



# Characteristics of people who are considering a cruise abroad in autumn/winter

Considering **travelling** abroad on a **cruise** in autumn and winter

Considering **travelling** abroad in autumn and winter, but not on a **cruise**

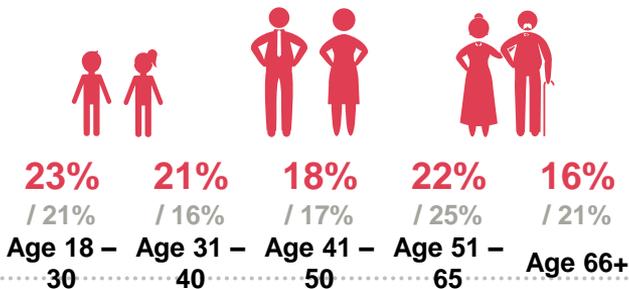
Norway has become **more attractive** during the coronavirus pandemic



Norway has become **less attractive** during the coronavirus pandemic



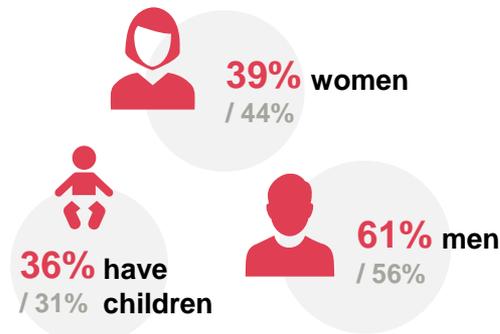
38% / 45%  
Have a **higher income** than average



Have been on holiday in **Norway** over the last three years



Have been on holiday **more than four times** over the last three years



Combined package tours **more important** during the coronavirus pandemic



More important to **put together a trip** myself during the coronavirus pandemic



TOPIC 3:  
**The impact of the coronavirus  
pandemic on desire to travel**

How many people are holding off travelling on account of the uncertain situation?  
What are the barriers to booking trips? In what locations are travellers most  
worried about being infected?



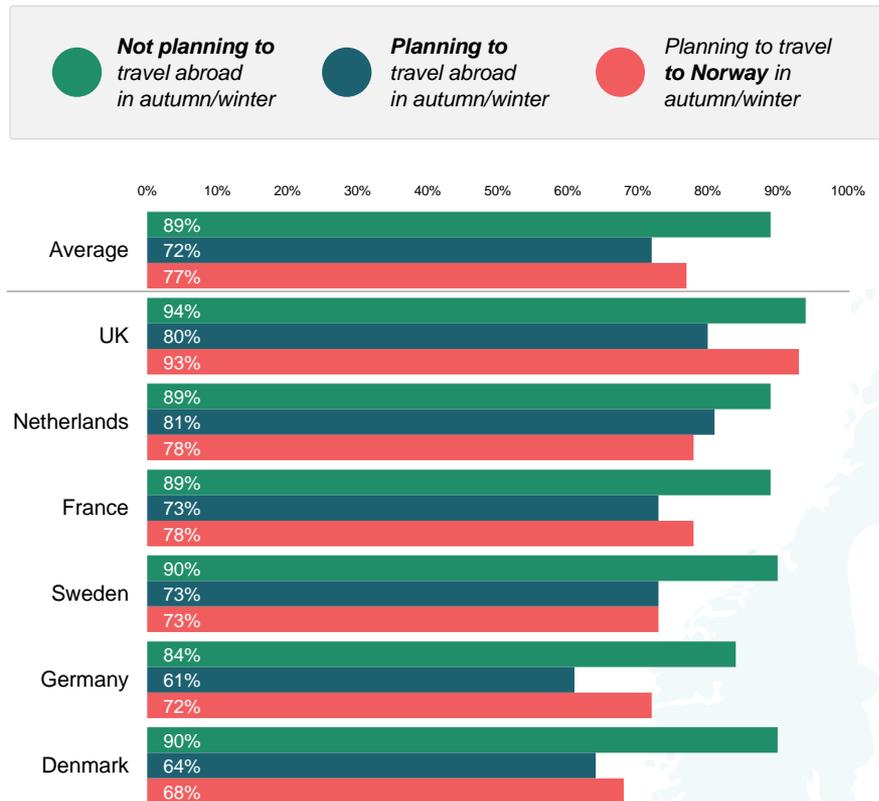
***This section looks at** people who are interested in travelling  
abroad over the next 3 years*

How many people are waiting to see how the pandemic develops before they decide?

## Almost everyone agrees that they want to consider developments before they decide to travel abroad

- Even among people who are considering or planning travel abroad, 7 out of 10 say that they are waiting to see how the pandemic develops before they make a final decision.
- These findings highlight the fact that the development of the pandemic will be absolutely crucial to whether the desire to travel triggers actual bookings and travel.

How much do you agree or disagree with the statement: *“I want to see how the coronavirus pandemic develops and wait to decide whether I should travel abroad”*  
Percentage who “agree” and “strongly agree” with the statement



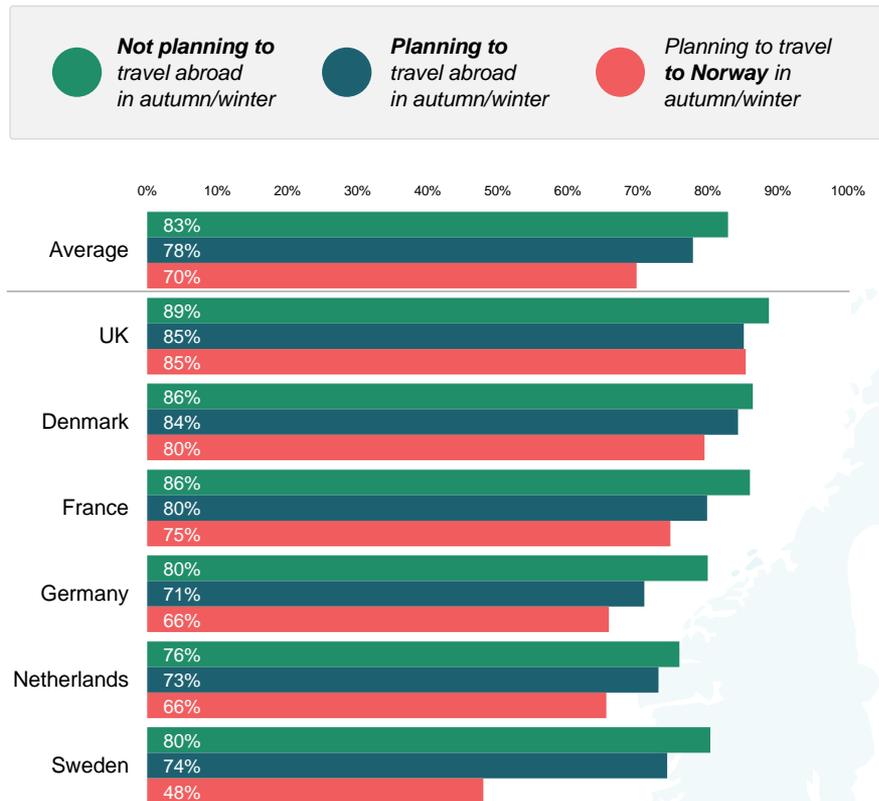
The importance of being able to cancel and get a refund

## 7 out of 10 people who are considering travelling to Norway will only make purchases if they can get their money back

- For the people who are considering or planning travel, having the opportunity to cancel their trips and get their money back is crucial.
- In an uncertain and unpredictable situation, it is natural for the vast majority of people to be concerned about whether they can get their money back if developments of the pandemic and travel restrictions mean that they have to cancel or that their trip will be cancelled.

How much do you agree or disagree with the statement: *“I will only book travel with stakeholders that I can rely on, and where I can get my money back if I have to cancel or the trip is cancelled”*

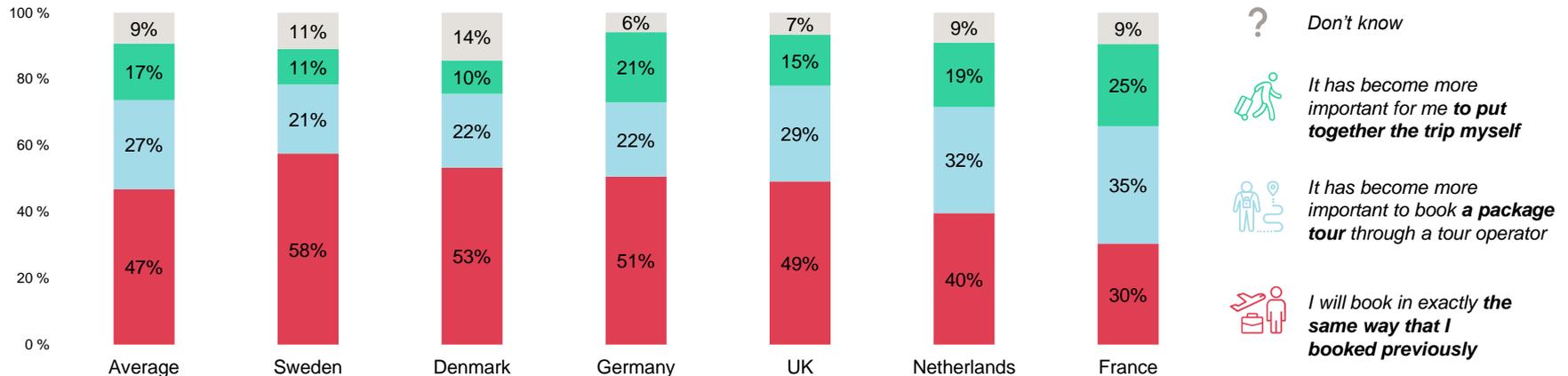
Percentage who “agree” and “strongly agree” with the statement



# Most people will book travel in the same way as before the pandemic, but a larger percentage are also of the opinion that it has become more important now to book a package tour with a tour operator, particularly among those from the Netherlands and France

- About 10%–25% of people responded that putting together their trips themselves has become more important.
- These figures are shown collectively because there was no significant difference between people who want to travel abroad in autumn/winter and people who do not. The exception is that more people said that it has become more important put together their trips themselves among people who want to travel, 21% versus 15%.

Has the uncertain situation during the coronavirus pandemic affected the way in which you would book travel?



## Many people miss being able to travel freely and without worrying about being infected.

### Nuances in the markets

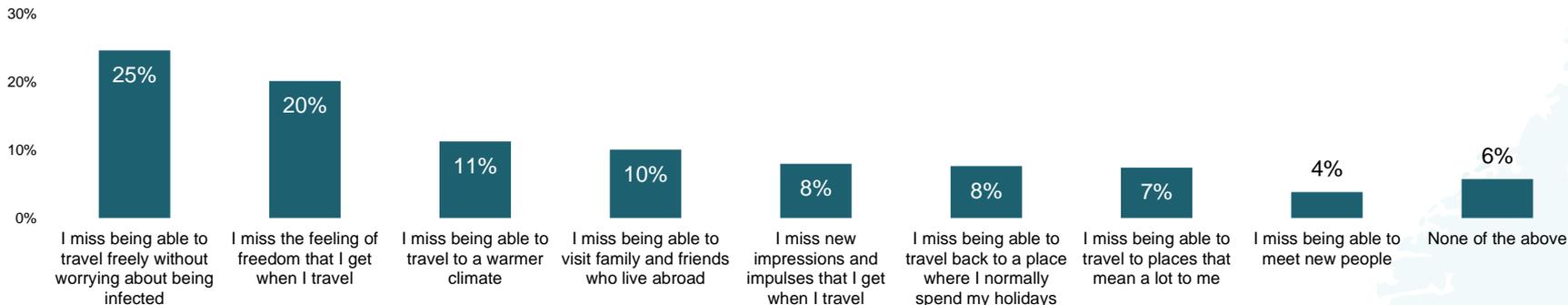
The British and the French are more likely to miss visiting family abroad than people from the other countries.

The Danes and Swedes do not miss the freedom to travel to any particular degree.

In particular, the Swedes miss being able to travel to a warmer climate.

The Danes miss being able to travel without being worried about the risk of infection.

Which of the following best describes what you miss most during the coronavirus crisis? Average across markets



**In particular, the general development of infection and the fact that it is possible to travel safely and securely are crucial to whether people actually travel abroad. Easy cancellation and refunds are also very important to many people.**

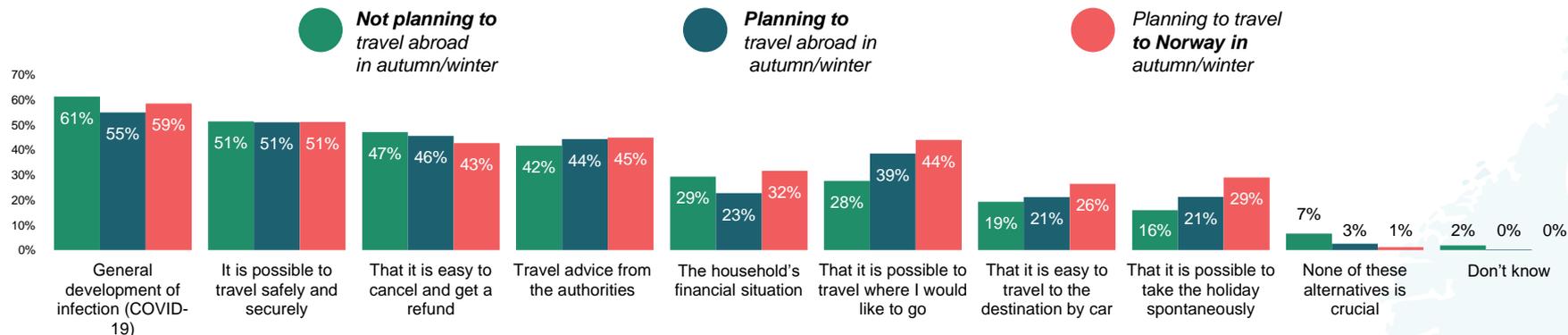
#### Nuances in the markets

The British place less emphasis on the authorities' recommendations and more emphasis on it being possible to travel safely and securely and on it being easy to cancel and get a refund.

The Swedes place significantly less emphasis on the general development of infection.

In the Netherlands and Germany, great emphasis is placed on it being easy to travel to the destination by car.

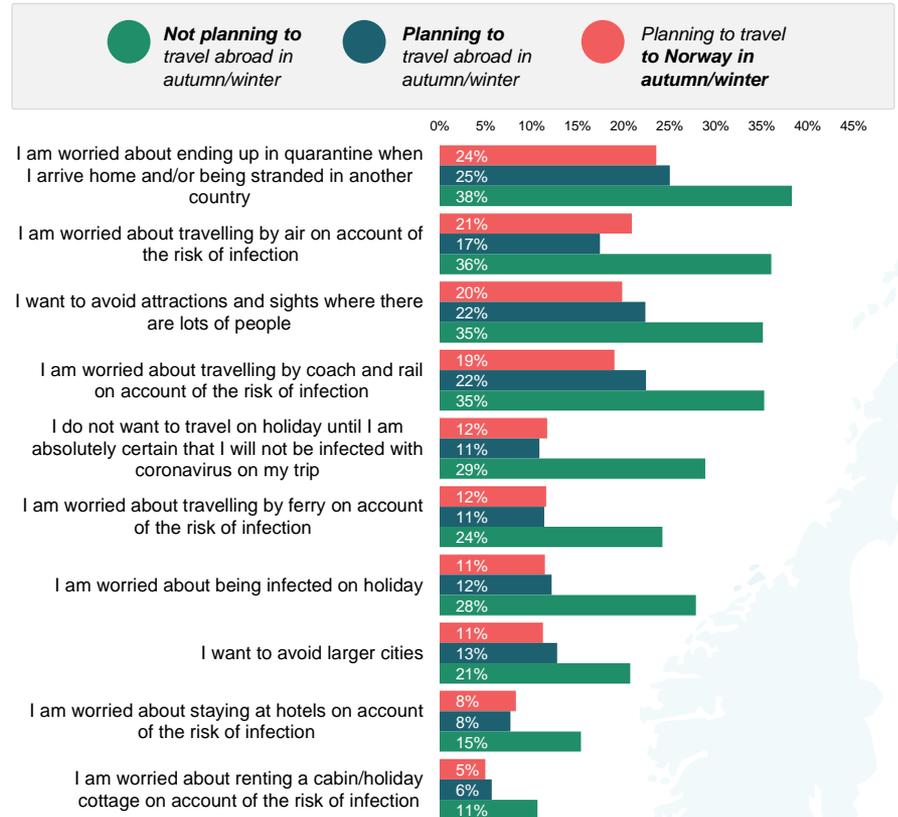
What will be the deciding factor in whether you choose to holiday abroad in the autumn/winter? Average across markets.



# People who want to travel are generally less worried about being infected

- Among people who want to travel, the biggest concern is that they may end up in quarantine or be stranded in another country. Some people are also worried about travelling by air, coach, and rail, and many people want to avoid attractions and sights where there are lots of people.
- People who are very worried have already decided to stay at home and do not want to travel abroad at all, as the situation is now.

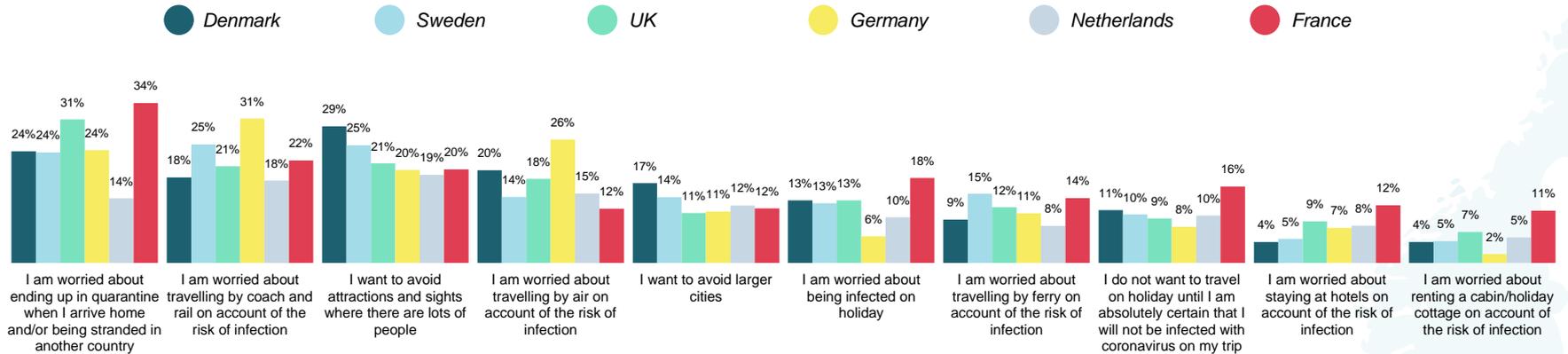
To what extent do you agree or disagree with the following statements on travelling during the coronavirus pandemic?  
Average percentage of "agree strongly" across markets



# There are clear differences between the markets with respect to the most worrying aspects during the coronavirus pandemic

- Worries about quarantine are greatest in France and the UK and lowest in the Netherlands.
- Worries about travelling by rail, coach, and air remain high in Germany.
- In Denmark, people are most worried about the risk of infection at attractions and sights where there are lots of people.

To what extent do you agree or disagree with the following statements on travelling during the coronavirus pandemic? Percentage of travellers planning a trip abroad and who “agree strongly” with the statement.



## TOPIC 4: Potential holidays in Norway during the autumn and winter season

How attractive is Norway as a holiday destination? How familiar are travellers with potential activities in Norway in autumn and winter? What holiday experiences will they be seeking in Norway?

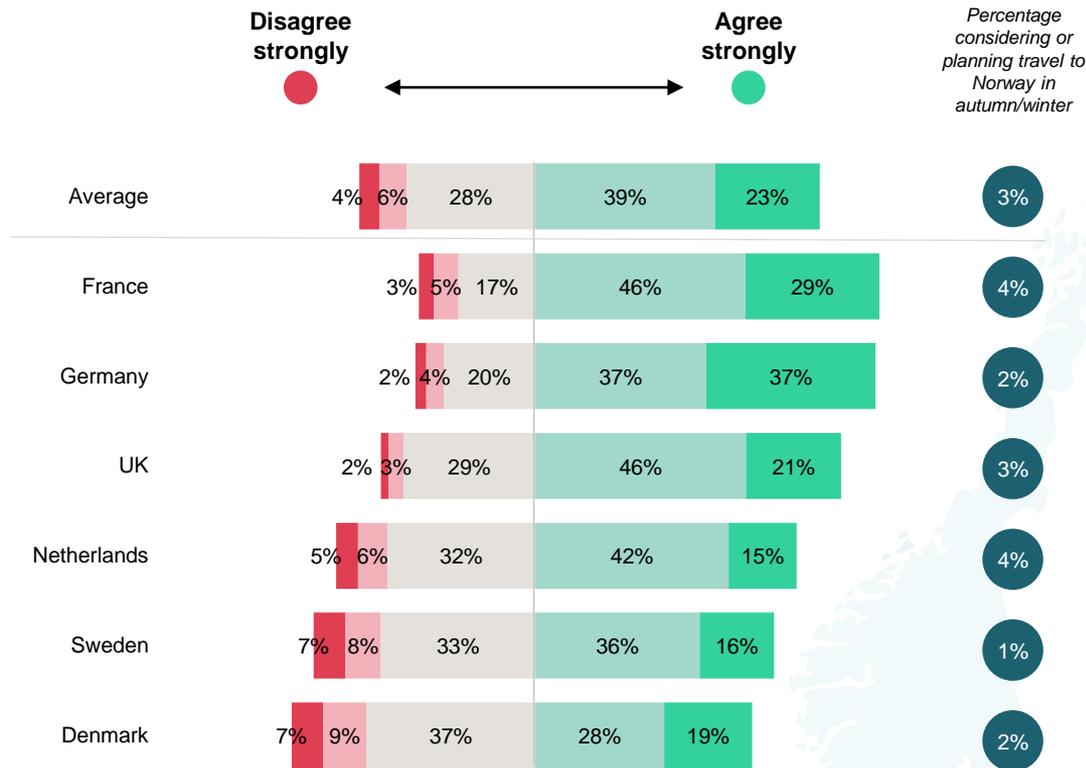


*This section looks at people who are interested in travelling abroad over the next 3 years*

# Most travellers consider Norway to be an attractive destination

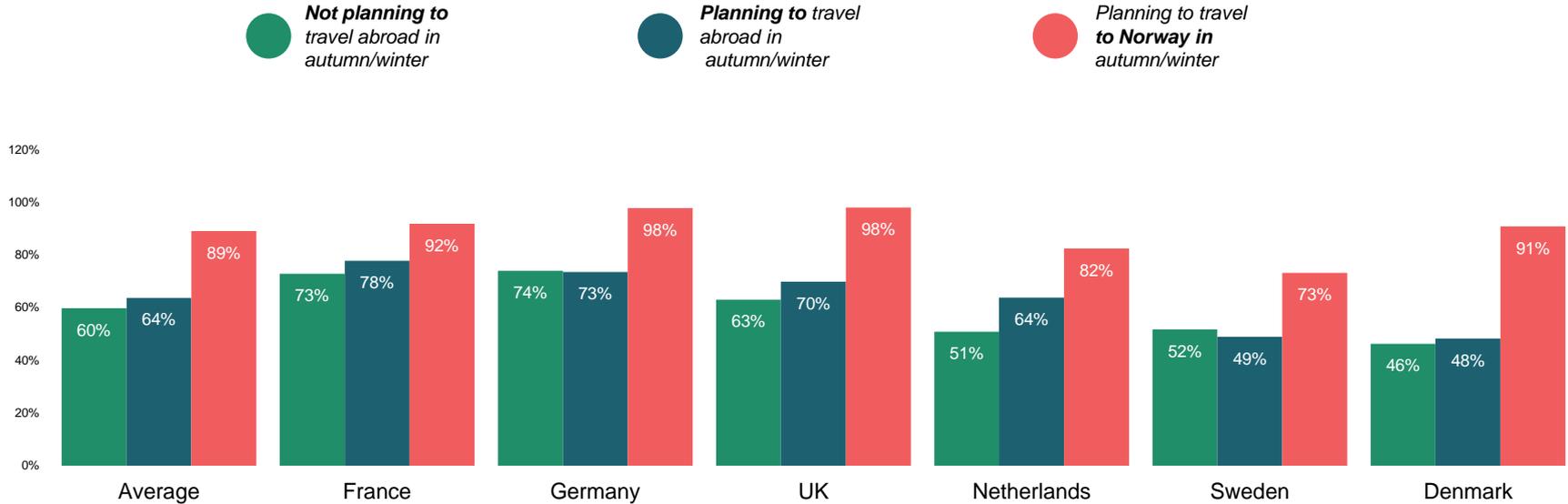
- Norway is perceived as an attractive destination, and more than 6 out of 10 tourists across the markets state that holidaying in Norway is attractive.
- French and German tourists are most likely to agree that Norway is attractive, while the neighbouring countries of Sweden and Denmark perceive Norway as attractive to a lesser extent.

To what extent do you agree or disagree that holidaying in Norway is attractive?



# Naturally enough, Norway is deemed to be most attractive among people stating that they are considering or planning travel to Norway

To what extent do you agree or disagree that holidaying in Norway is attractive? Percentage who “agree” and “strongly agree” with the statement



# There is agreement that there are lots of exciting things to experience in Norway, but by no means is everyone familiar with what is actually available to do and experience in the autumn and winter season

- More than half feel that there are a lot of exciting things to experience in Norway in autumn and winter, but only a third of respondents are very familiar with what can actually be done and experienced on a holiday in Norway at this time of year.
- Familiarity with what can be done and experienced in Norway in the autumn/winter season is relatively similar across markets, with the exception of the Netherlands and the UK.
- There is no clear link between familiarity with what can be done and experienced on holiday in Norway and thinking there are lots of exciting things to experience in Norway.

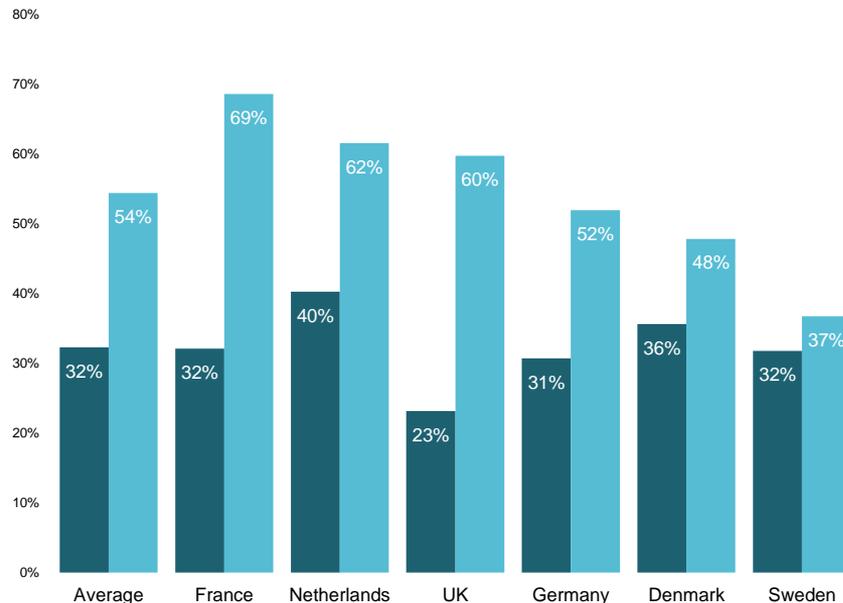
To what extent do you agree or disagree with the following statement about holiday  
Percentage who “agree” and “strongly agree” with the statements.



*I am very familiar with what can be done and experienced on a holiday in Norway in autumn and winter*



*There are lots of exciting things to experience in Norway in autumn and winter*

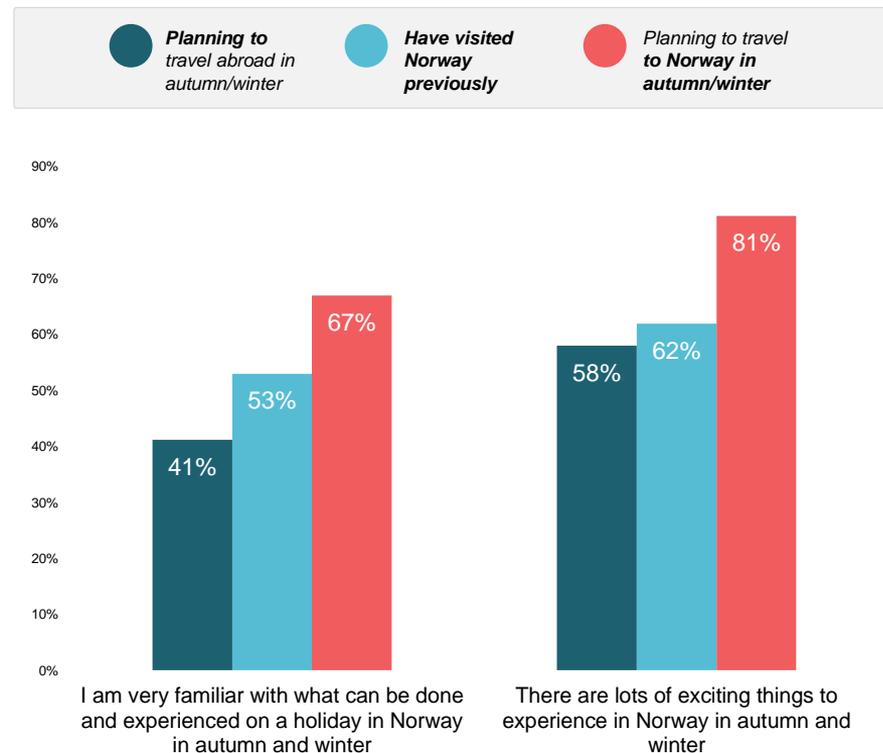


## Norway is attractive, even to people who do not plan to visit Norway in autumn and winter

- People who are planning to visit Norway, or who have visited Norway previously, are of course more familiar with what can be experienced here.
- Of course, the attractiveness is greatest among people who are considering or planning a visit to Norway in autumn/winter. The attractiveness is also high among people who have visited Norway previously but who have no immediate plans to visit Norway in autumn/winter.

### To what extent do you agree or disagree with the following statement about holidaying in Norway?

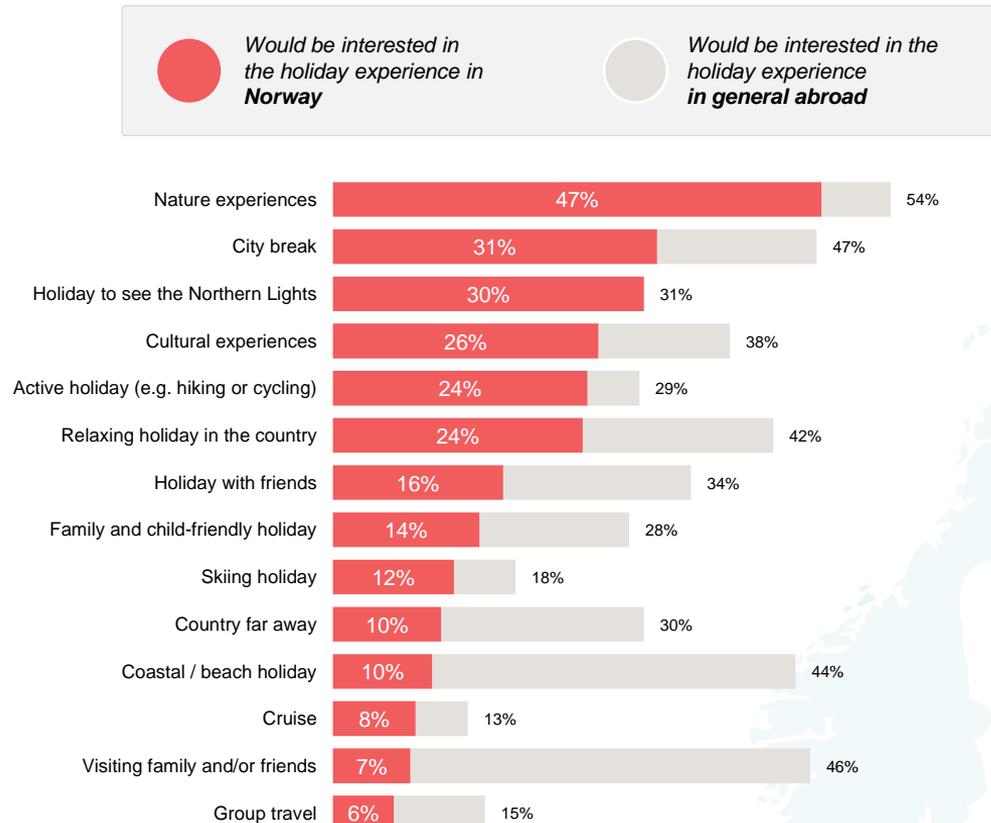
Percentage who “agree” and “strongly agree” with the statements



## In particular, people who prefer experiencing nature are interested in experiencing it in Norway

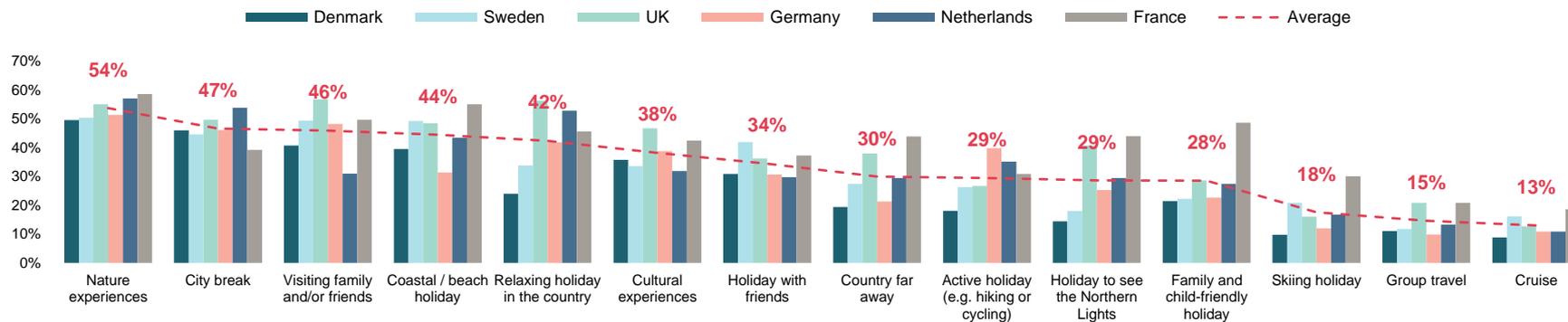
- Norway has a good grasp of tourists who are interested in holiday experiences such as experiencing nature, the Northern Lights, and active holidays.
- Norway is also interesting among tourists who are on the lookout for city and cultural experiences. Most of these are considering such experiences in Norway.
- The market for skiing holidays is smaller than nature experiences and city experiences, but Norway is a relevant destination among people who are interested in travelling on skiing holidays. Two out of three ski tourists are considering travelling to Norway on a skiing holiday.

If you were to travel on holiday abroad in autumn/winter, which holiday experiences would you consider in Norway in autumn/winter? Average across markets.



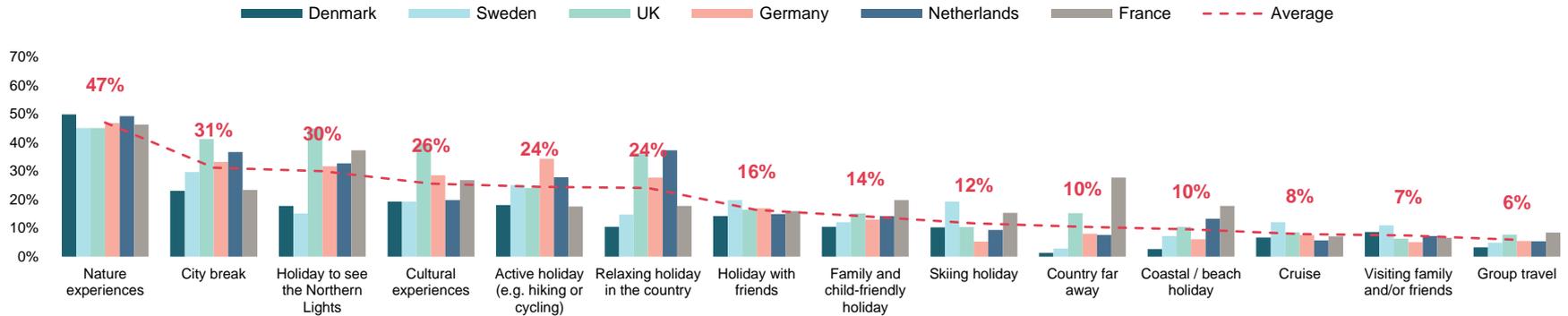
# The most popular holiday experiences across the markets are experiencing nature, city experiences, and visiting family and friends. There are significant differences between the markets.

If you were to travel on holiday abroad during the autumn/winter, how likely are you to be interested in the following holiday experiences on such a trip?  
Percentage responding “likely” and “very likely”.



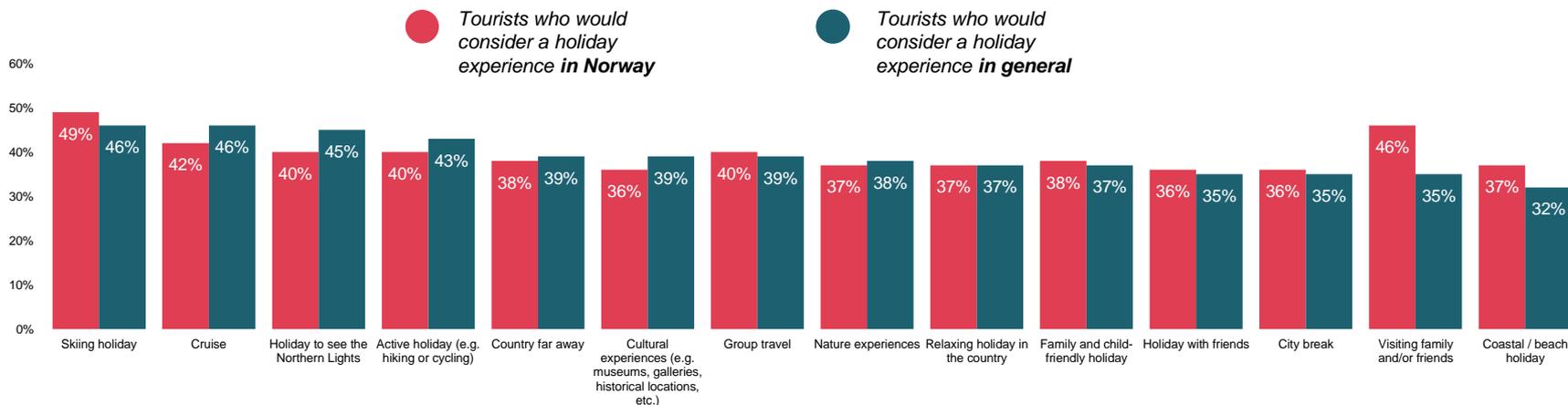
**For Norway, experiencing nature, city experiences, and Northern Lights experiences are the most popular holiday experiences in this season. There are major variations between the markets. For example, German tourists are more likely to demand active holidays.**

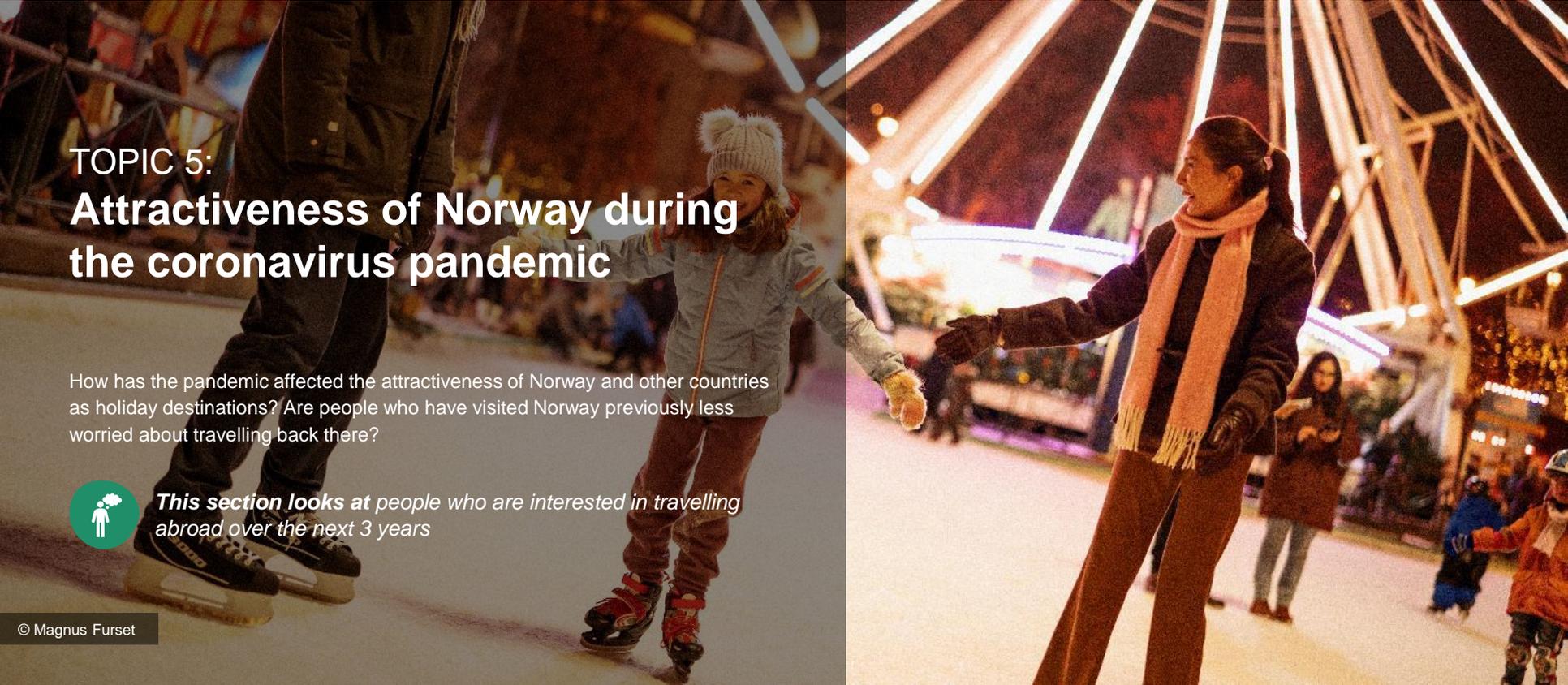
Which of these holiday experiences would you consider seeking in Norway?



# Familiarity with what can be experienced and done in Norway is similar, regardless of which holiday experiences are demanded. People who are considering skiing holidays, cruises, Northern Lights experiences, and active holidays have the greatest familiarity.

I am very familiar with what can be done and experienced on a holiday in Norway in autumn and winter  
Percentage of “agree” and “agree strongly” among people wishing to seek a holiday experience. Average across markets.





TOPIC 5:  
**Attractiveness of Norway during  
the coronavirus pandemic**

How has the pandemic affected the attractiveness of Norway and other countries as holiday destinations? Are people who have visited Norway previously less worried about travelling back there?



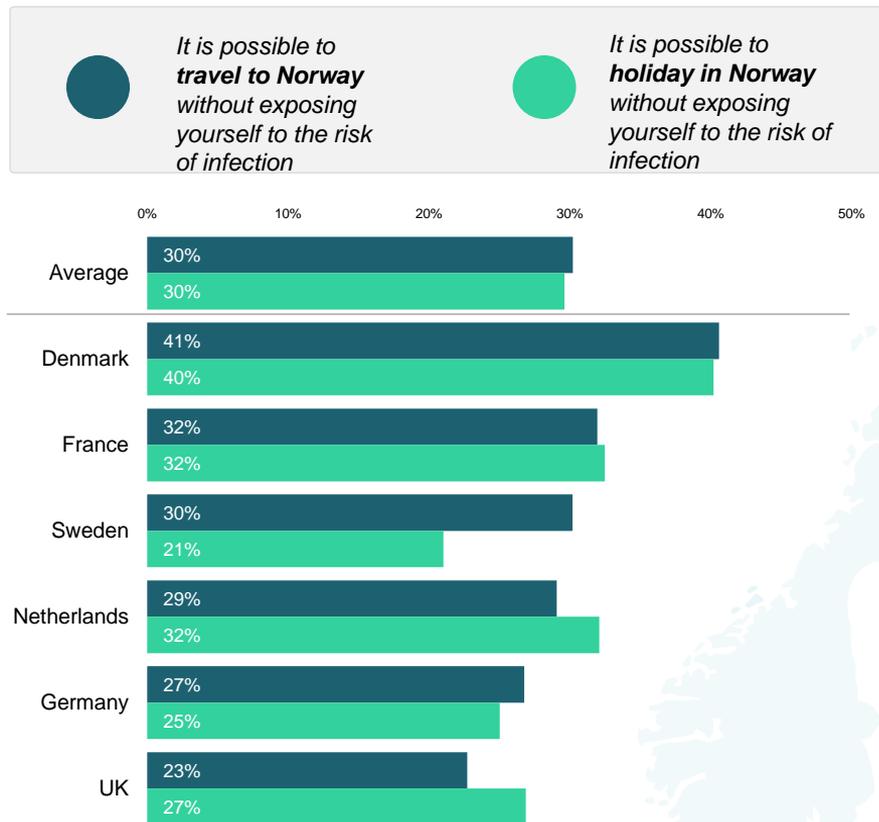
***This section looks at** people who are interested in travelling abroad over the next 3 years*

## There are worries about infection in connection with both travelling to and holidaying in Norway, but there are major differences between the markets

- The British and the Dutch are more worried about travelling to Norway – particularly by air – than about holidaying in Norway.
- The Swedes are most worried about exposing themselves to the risk of infection on holiday in Norway.
- The Danes are by far the least worried about being infected when both travelling to and holidaying in Norway.

### To what extent do you agree with the following statement about holidaying in Norway?

Percentage who “agree” and “strongly agree” with the statements

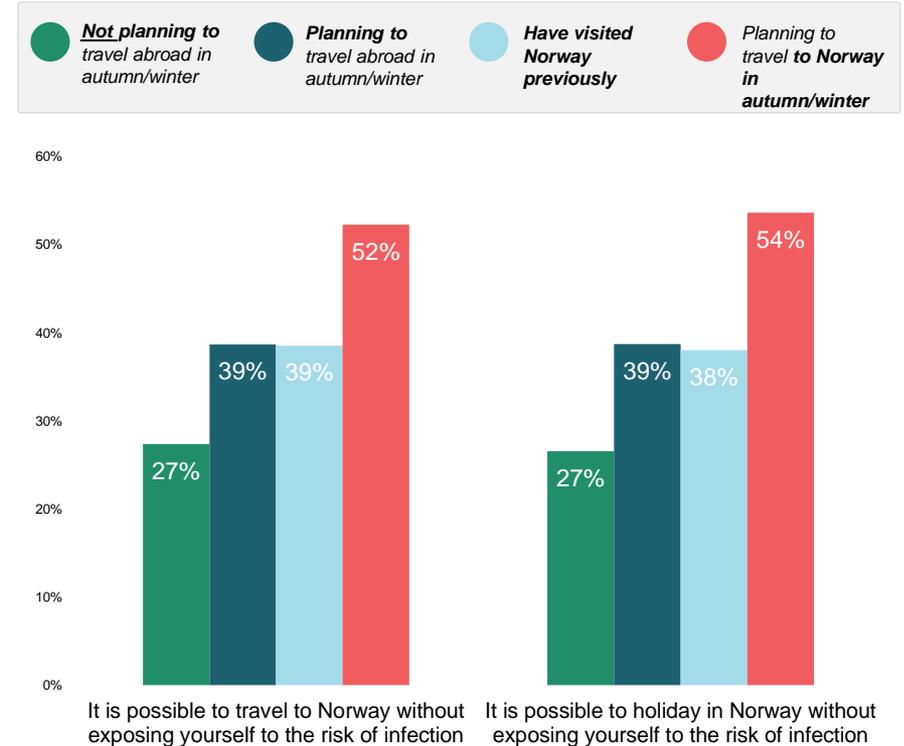


# People who are considering travelling to Norway are less worried about exposing themselves to the risk of infection

- Among people who are considering or planning to travel to Norway in autumn or winter, half agree that it is possible to get to Norway without exposing themselves to the risk of infection.
- A greater proportion of these also consider it possible to holiday in Norway without exposing themselves to the risk of infection.

## To what extent do you agree with the following statement about holidaying in Norway?

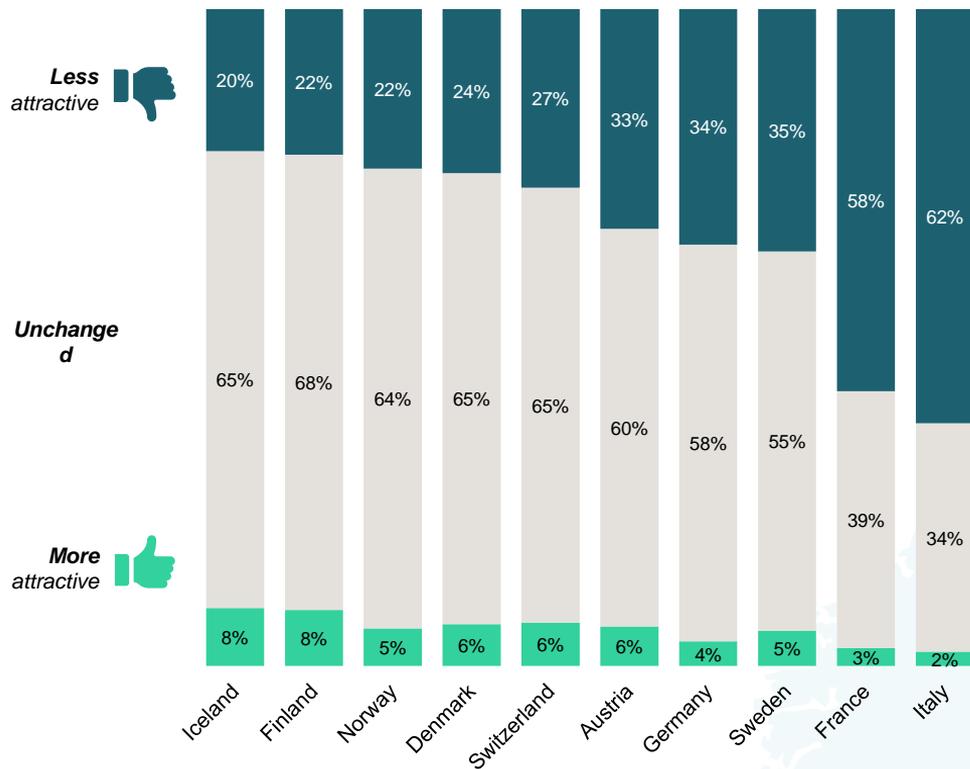
Percentage who “agree” and “strongly agree” with the statements



## All countries were deemed to be less attractive, but Norway is one of the countries that comes out best

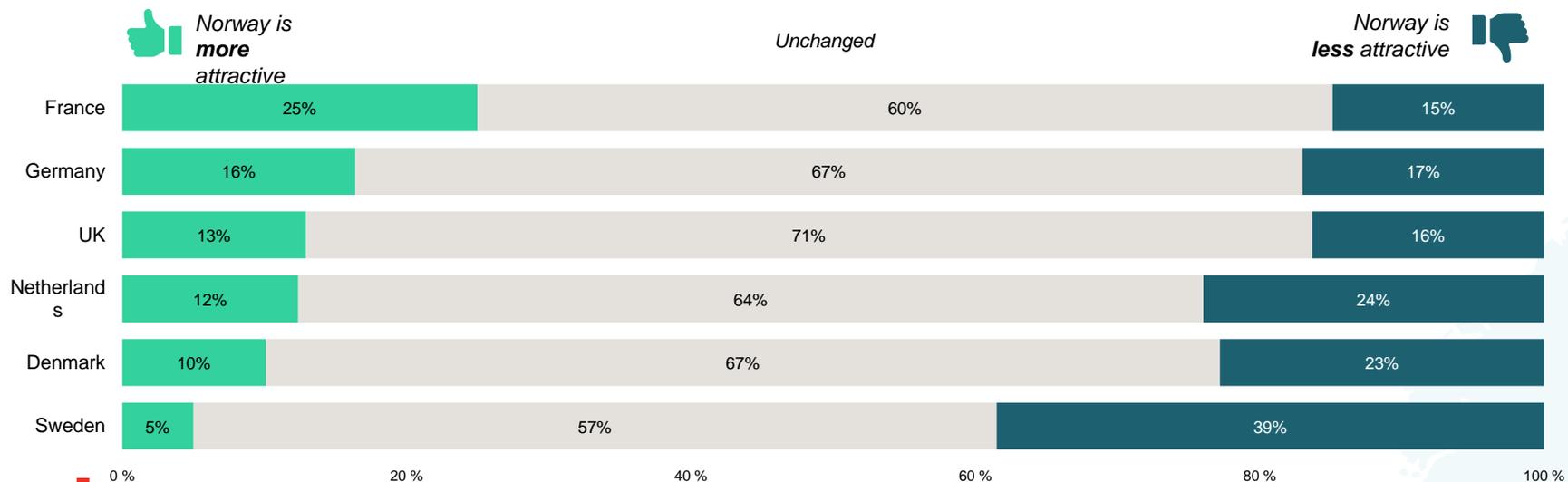
- All holiday countries are generally less attractive during the coronavirus pandemic.
- The majority have not changed their attitudes.
- Norway fares very well, as do Iceland, Finland, and Denmark.
- France and Italy in particular have experienced a brutal decline in attractiveness during the coronavirus pandemic.

In your opinion, have these countries become more or less attractive for you to travel to during the coronavirus pandemic? Average across markets.



**There are major variations in how the attractiveness of Norway has been affected by the coronavirus outbreak. The French largely perceive Norway to be more attractive, while the Danes and the Swedes do not share that view.**

Has Norway become more or less attractive for you to travel to during the coronavirus pandemic?

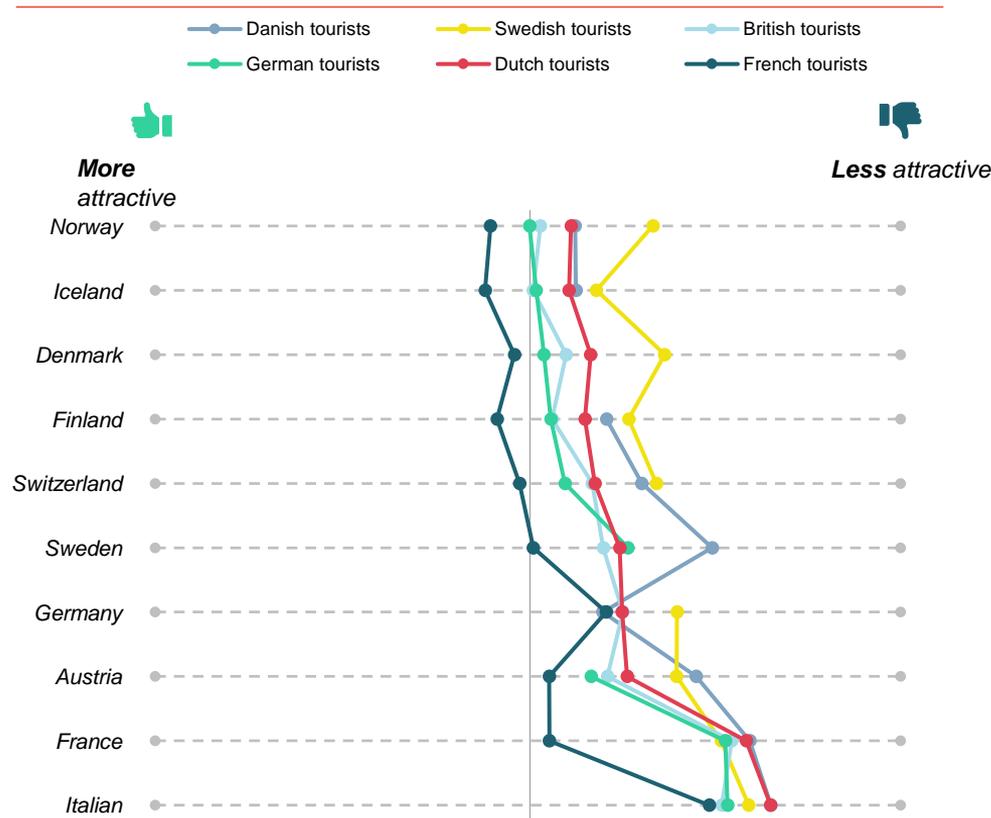


## All countries are finding that their attractiveness is declining during the coronavirus pandemic

- In France and Germany, the attractiveness of Norway has increased during the coronavirus pandemic.
- Other skiing destinations such as Austria, Switzerland, and Sweden have all found that their attractiveness has declined to a significant extent.
- Norway, Iceland, Denmark, and Finland were the most attractive countries during the coronavirus pandemic at the time of the survey.

### In your opinion, have these countries become more or less attractive for you to travel to during the coronavirus pandemic?

The graph shows the net attractiveness of the countries, calculated by: % more attractive - % less attractive



# Source data and methods



## The survey was carried out among people who are considering travelling

- As anticipated, there has been a decline in travel across all markets during the coronavirus pandemic, with the exception of Sweden. There has been less decline in the population here. In this respect, data from the survey were compared with Innovation Norway's brand tracker before coronavirus.
- This survey includes a requirement for respondents to be interested in travelling abroad over the next three years if so permitted by the situation.

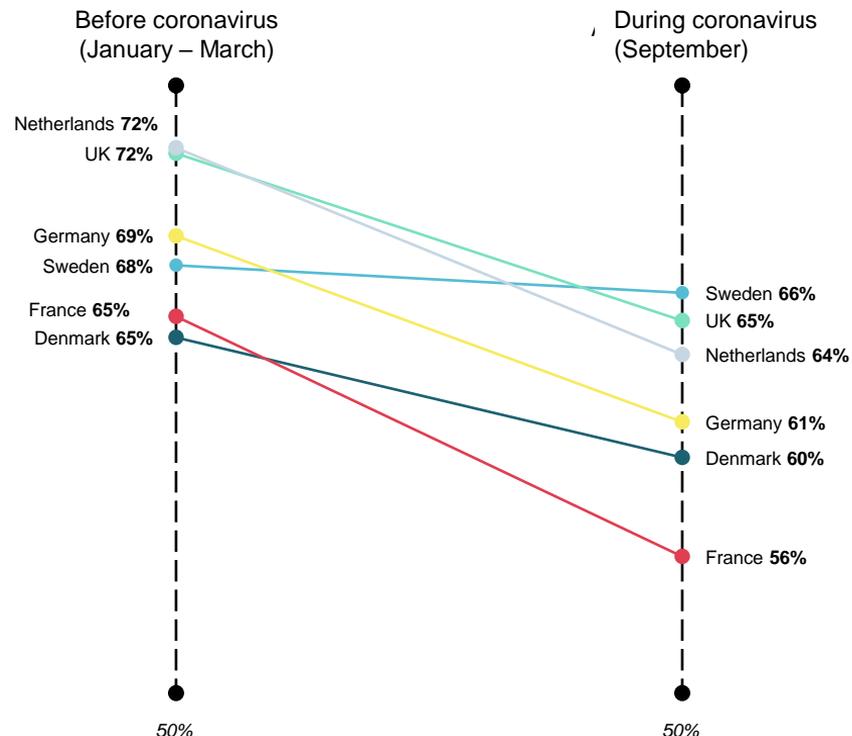
### Definitions of active tourists

Before the coronavirus pandemic broke out, previous travel behaviour was the best indicator of future travel behaviour. Since the outbreak, however, it has been necessary to introduce an additional loose criterion relating to being interested in travelling abroad in the future.

*Tourists active before coronavirus:* People who have been on holiday or travelled for leisure purposes abroad over the last three years.

*Tourists active during coronavirus:* People who have been on holiday or travelled for leisure purposes abroad over the last three years and who are interested in travelling on holiday over the next three years if permitted by the situation.

Percentage of active holidaymakers in the respective markets before and after the outbreak of the coronavirus pandemic



## Overview of the source data in the various markets

The survey of the impact of the coronavirus pandemic on desire to travel and travel plans has been carried out as an online questionnaire-based survey. The analysis is based on interviews with 1000 potential travellers\* in each of the markets in Germany, France, the United Kingdom, the Netherlands, Sweden, and Denmark. The results must be viewed in light of the fact that the data were gathered between 2 and 21 September.

The data were weighted so as to be representative according to the distributions for gender and age.

More data are available in the Innovation Norway dashboard.

### Number of interviews performed in the six European countries

	Number of people who are not planning to travel abroad	Number of people who are planning to travel abroad	Total
<b>UK</b>	828	347	1 175
<b>Denmark</b>	725	297	1 022
<b>Netherlands</b>	696	322	1 018
<b>France</b>	601	421	1 022
<b>Germany</b>	677	395	1 072
<b>Sweden</b>	759	264	1 023
<b>Total number of interviews</b>	4 286	2 046%	6 332

*The interviews are limited geographically to the focus areas listed below:*

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

**UK:** Bedfordshire and Hertfordshire, Berkshire, Buckinghamshire and Oxford shore, Essex, Inner London, Outer London, Kent, Surrey, East and West Sussex ("The area around London").

**France:** Ile de France, Rhone-Alpes ("The areas around Paris and Lyon").

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

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