

Coronavirus Barometer – Winter 2021 / 2022

Survey conducted in the United Kingdom, Germany, France,
the Netherlands, Denmark and Sweden in the period
November-December 2021

Report – Innovation Norway

Introduction

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BACKGROUND

The coronavirus crisis has resulted in many tourists postponing, cancelling or changing their travel plans in the last 2 years. Unpredictability, constantly changing travel rules, new variants, quarantine and great uncertainty have turned the travel habits of very many people upside down. The survey shows that this has created a huge, pent-up desire to travel for large groups in each of the markets. We can see that many people expect to holiday abroad and that many expect to do so more than once in the next 12 months. There are grounds for optimism, so it just remains to be seen whether this potential translates from a huge desire to travel to actual trips.

Since spring 2020, Innovation Norway has conducted a Coronavirus Barometer survey that takes the temperature of, and provides insights into the desire to travel, expectations and barriers in, both the Norwegian market and the markets in the United Kingdom, Germany, France, the Netherlands, Denmark and Sweden. This report contains the main findings from the foreign market survey conducted in November and December. The report was produced by Gyger and Epinion in collaboration with Innovation Norway.

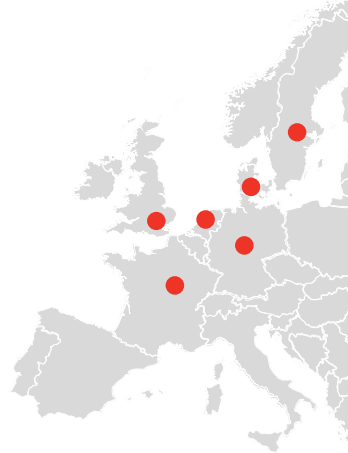
DATA AND READER GUIDE

The analysis is based on interviews of 12,000 potential tourists; 2,000 in each of the markets in the United Kingdom, Germany, France, the Netherlands, Denmark and Sweden. The data was collected* between 15 November and 9 December.

The first part of the report presents the results across the markets. It shows the trends over time from Autumn 2020 to July 2021. The second half of the report presents an overview of what characterises those who are considering visiting Norway in the coming 12 months.

* Target group surveyed:

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



Summary of findings



Significantly increased desire to travel across the markets. No fewer than 90% of those who want to travel abroad in the next 3 years want to travel as early as in the next 12 months. The Danes and Dutch are the most eager to travel abroad as early as winter 2022, while more Germans will wait until the summer.



The desire to travel has increased, as has the desire for new experiences. While relaxation remains the most important factor, a large minority are interested in experiencing a lot when they (finally) have an opportunity to travel abroad again. In particular, those who want to travel to Norway in the next 12 months want to experience a variety of impressions and experiences.



Norway is more popular than ever before during the pandemic. Two out three would like to travel here in the next 3 years and 7% as soon as this year. Those who want to visit Norway are looking for a wide range of experiences and the idea of 'touring Norway' is especially popular in Germany and the Netherlands.



Sustainability has become a far more important factor during the pandemic, across the markets. In this survey, tourists are more interested in making sustainable choices while on holiday (stay longer, travel outside peak season and shop locally) than refraining from travelling (fly less and not travel abroad). Much indicates that the underlying desire to travel is very strong among a large proportion of tourists and that this is influencing exactly how they want to do their bit for nature, the climate and the environment.

Main findings per market

UK

The UK has rediscovered its desire to travel. British people considering Norway are more interested in culture and luxury than tourists from other markets. They want to explore and experience Norway's history, cultural heritage, architecture, art and, not least, the atmosphere and food culture in the destinations. Many would like to purchase local food products to take home. The Northern Lights are the most tempting attraction, although visiting Oslo and Bergen are also high up on the list. Those who want to visit Norway are interested in sustainability and often choose destinations and businesses that demonstrate that they take this seriously.

Germany

The desire to travel in Germany is a huge, although it is largely in the summer that they expect to travel abroad again. Those Germans who are considering Norway are more interested in the winter, Easter and autumn holidays than other German tourists. At the top of their list is a holiday where they can explore and discover new things and/or an active holiday. Were they to come to Norway, a large majority would want to experience both Oslo and Bergen. A large group find experiences in nature, history and cultural heritage, food culture and the new Munch Museum attractive.

France

The desire to travel in France has increased steadily since autumn 2020 and will soon be back to pre-pandemic levels. The French largely expect to travel in the summer, although many also want to travel abroad in the Easter holidays. More than 70% of those who want to travel abroad in the next 3 years are interested in visiting Norway. The French are more interested in culture and food experiences than others. On a trip to Norway, they would want a variety of experiences, both in summer and in winter.

Netherlands

The Dutch expect to travel as early as this winter, although Norway is particularly tempting in the summer. Experiences in nature are the main attraction and they are more interested in relaxing on a holiday in Norway than others. This does not mean that they do not want to be physically active, but they score somewhat lower on cultural experiences than the UK and France, although higher than Sweden and Denmark. A large minority in the Netherlands are interested in cultural experiences and most want to experience food culture and purchase local foods to take home with them.

Denmark

The Danes' desire to travel is back to pre-pandemic levels. Those who are considering Norway are particularly interested in experiencing the mountains, activities in nature and natural attractions in the summer and alpine skiing in the winter. Very many are interested in visiting Oslo, although the interest in city and cultural experiences in Norway is lower in Denmark than in other countries in the survey. Danes feel less responsibility for nature and the environment than tourists from other countries, although the feeling of responsibility has increased a lot during the pandemic.

Sweden

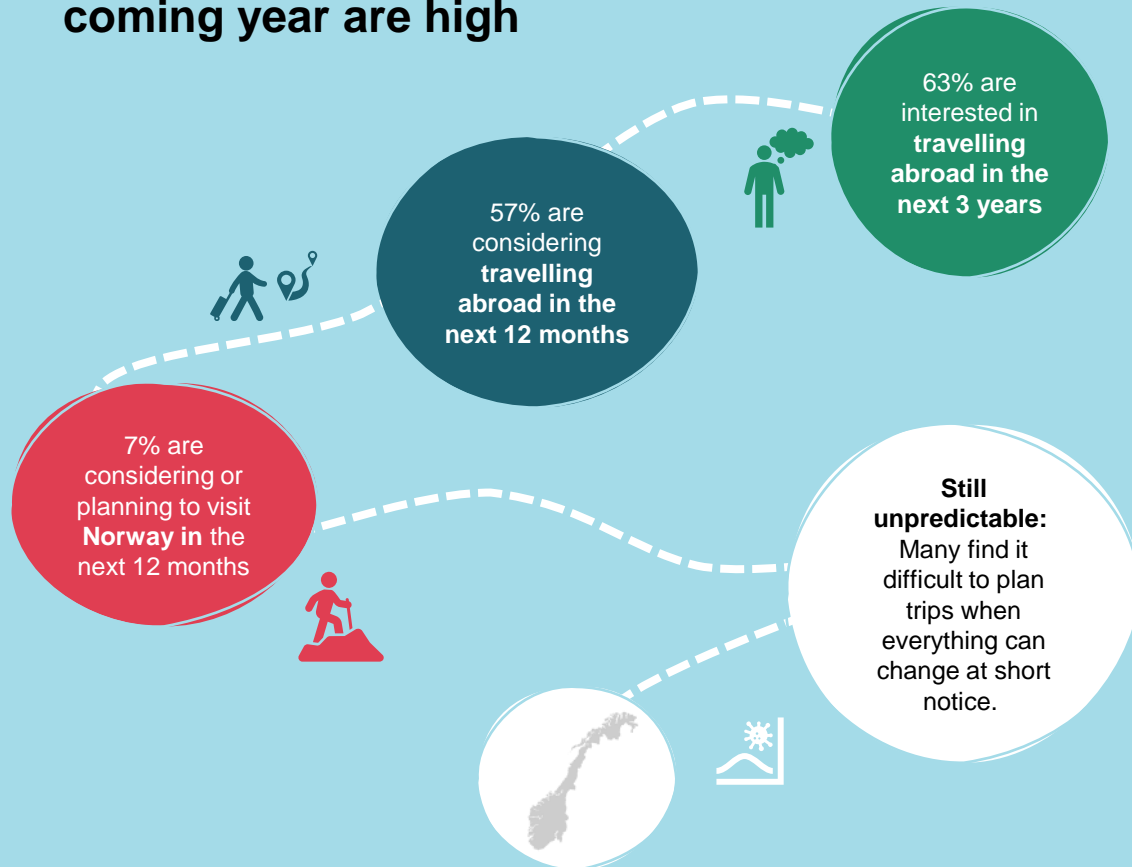
The attractiveness of Norway as a destination is increasing sharply after falling heavily during the first phase of the pandemic. No fewer than 72% of those who want to travel abroad in the next 3 years are interested in visiting Norway. This is an increase from just 56% in the June survey. The Swedes are interested in visiting many cities like Oslo, Bergen, Trondheim and Tromsø. They are more likely to want to visit friends and acquaintances and go to festivals and events. Nature is also a big draw in Sweden, both in the summer and in the winter.



Future travel expectations

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

Uncertainty remains, although travel expectations for the coming year are high



The proportion of the population interested in travelling abroad in the next 3 years fell during the pandemic, but the desire to travel is now rising again. Of those who expect to travel abroad in the next 3 years, no fewer than 90% want to travel as early as within 12 months.

Very high interest in Norway, both in the next 3 years and as early as the next 12 months, across the markets.

Continued great uncertainty and unpredictability
The majority still find it difficult to plan trips abroad when everything is constantly changing.

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

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

Overview of the various target groups in the survey



Entire population



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



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



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



Those who would like to go on holiday to Norway in the summer season / winter season in the next 3 years

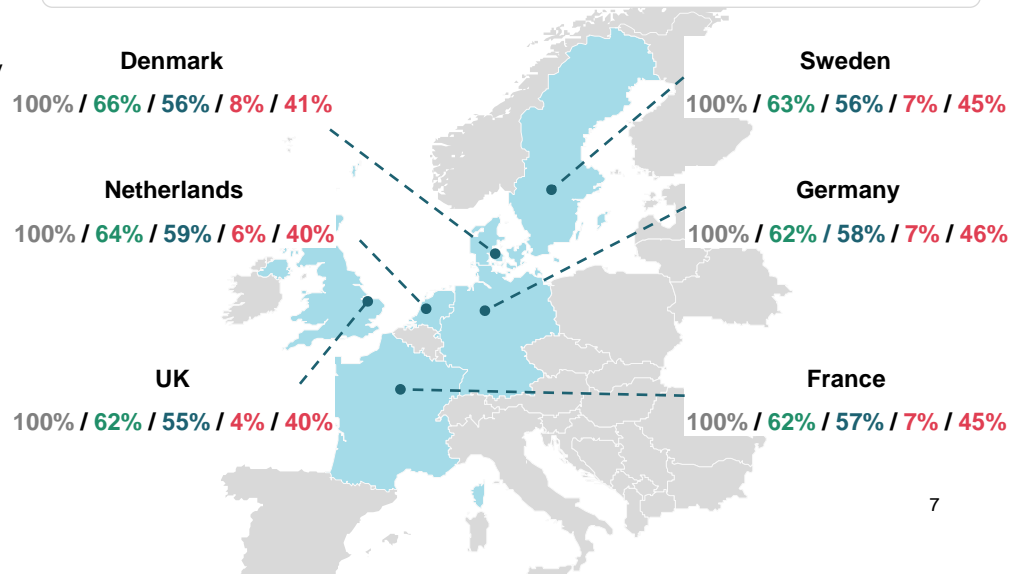
Areas in which interviews were conducted:

Sweden, Denmark and the Netherlands: Covered nationally.

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

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

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



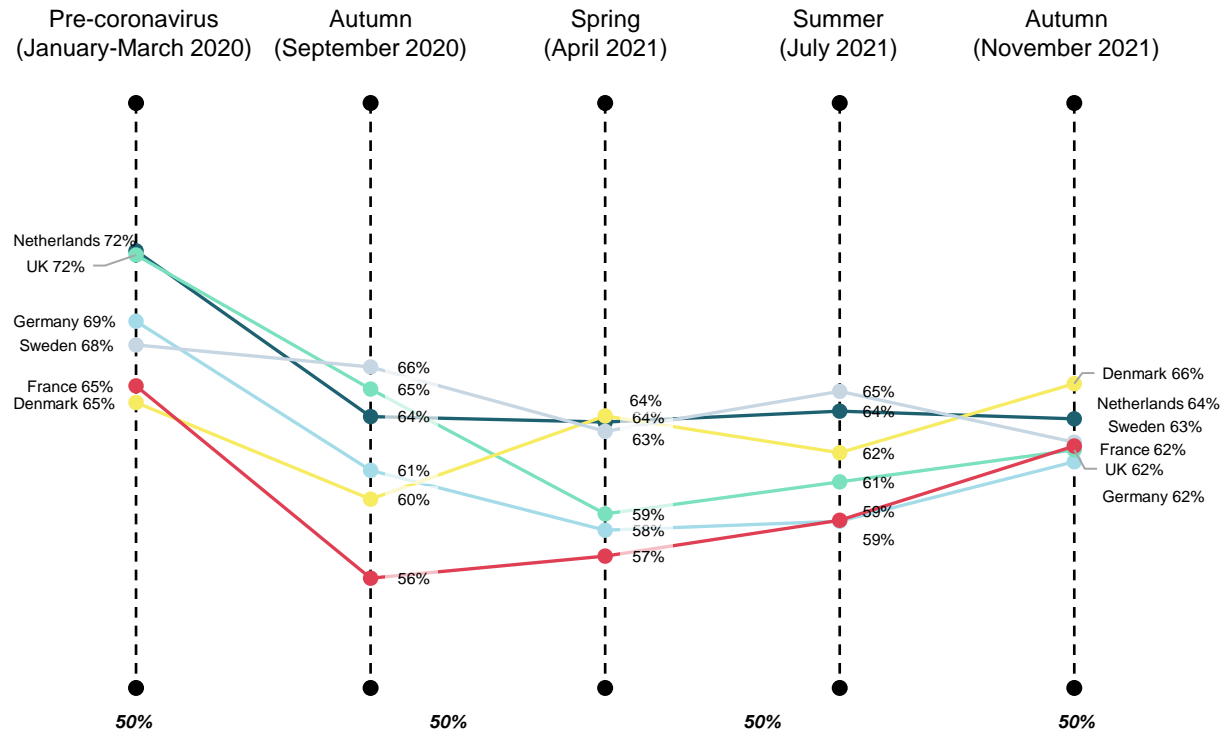
Proportion of the population interested in holidaying abroad in the next 3 years

Definitions of potential tourists before and after the coronavirus

Prior to the outbreak of the coronavirus pandemic, previous travel behaviour was the best indicator of future travel behaviour.
Pre-coronavirus potential tourists: People who have been on holiday or travelled abroad for leisure purposes in the past 3 years.

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

Development in the proportion of potential tourists – those interested in travelling abroad in the next 3 years (survey's target group)



Entire population

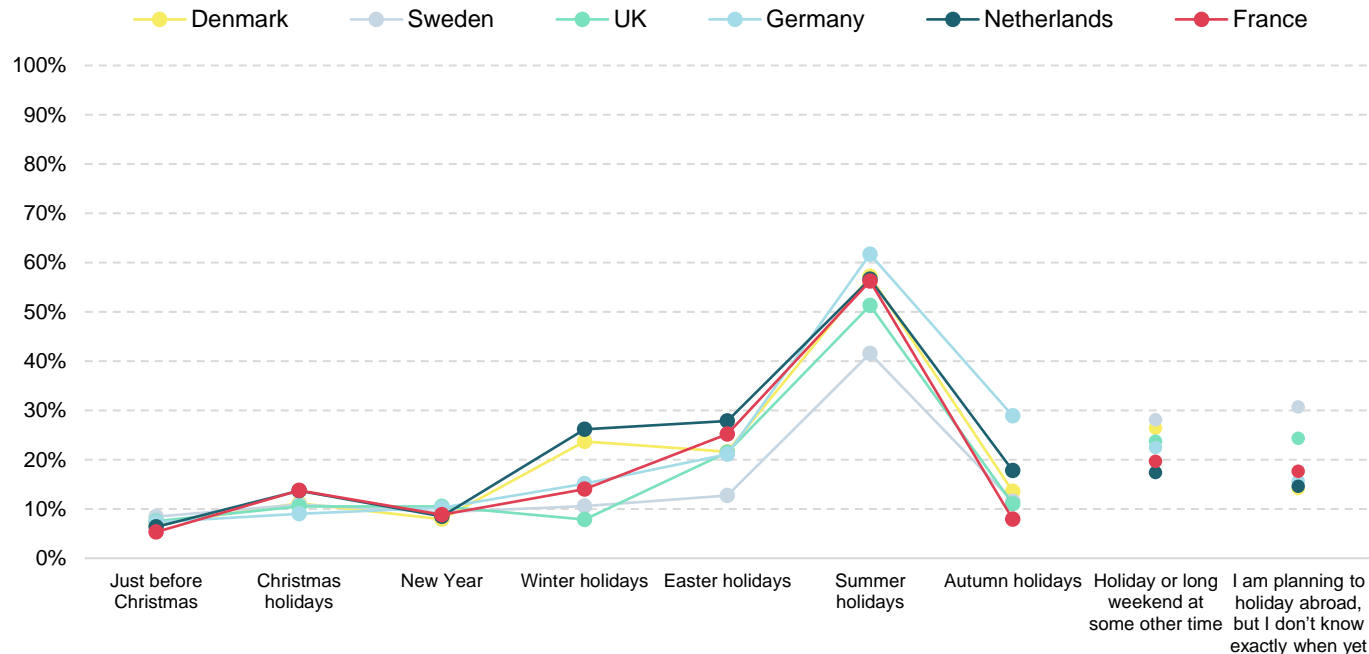
Travel boom in the summer?

- The Dutch and Danes have high expectations of travelling abroad as early as the winter holidays and Easter holidays. The Germans are more reticent and do not want to travel until the summer.
- Swedes want to travel but have to a lesser extent decided when they will travel. They appear to be awaiting developments.



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

When do you expect to travel abroad on holiday in the next 12 months? You can choose multiple alternatives.
Proportion of those interested in travelling abroad in the next 12 months



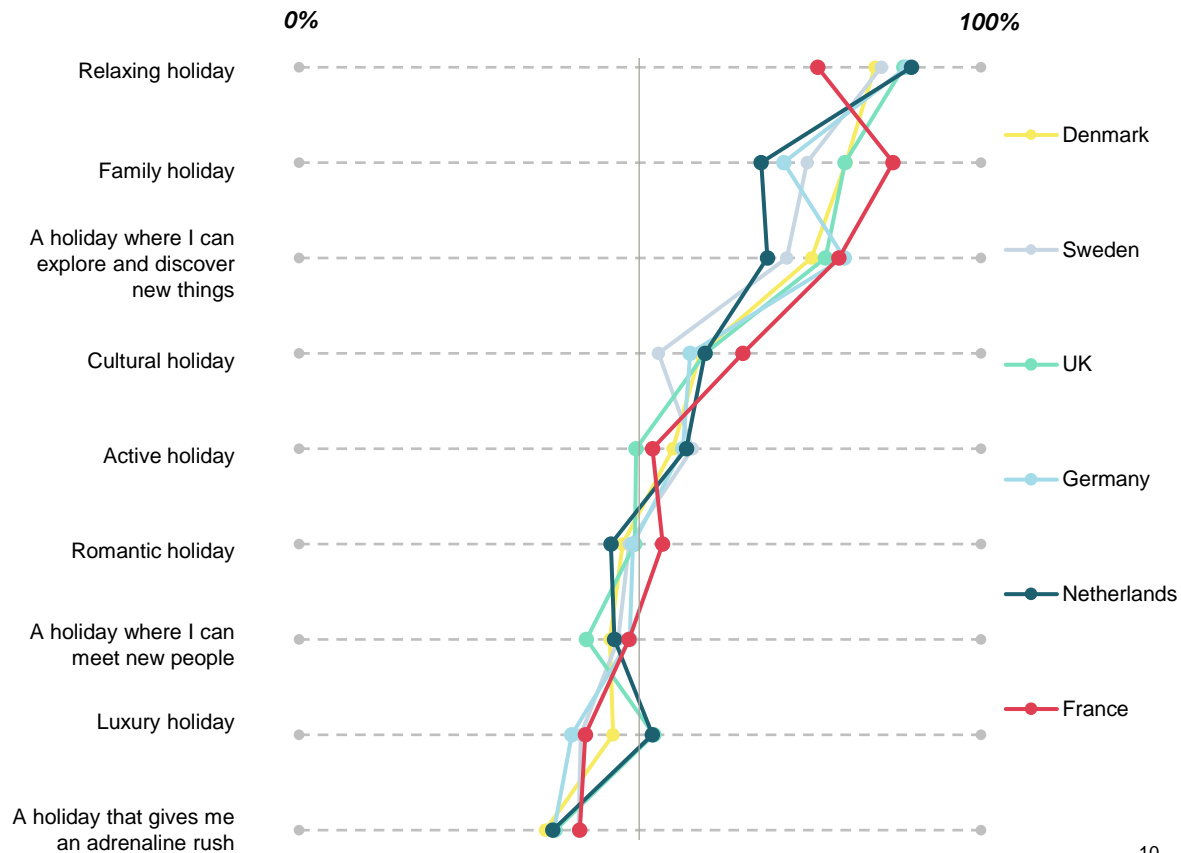
Great potential for many types of holiday

- Relaxation and family are the most important for most people across the markets.
- After almost 2 years of the pandemic, a very large number respond that they want to go on holiday to explore and discover new things. In Germany, this is more important than a family holiday. No fewer than 50% respond that it is important.



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

How well do the following types of holiday match the trips abroad you are expecting to take in the next 12 months?
Choose the most important



People want to take greater responsibility for nature and the environment when they travel

- The proportion who have become more interested in taking responsibility for the environment, climate and nature when they travel has risen sharply in every market except for France.
- The Danes stand out as being less interested in this, although here too the proportion who are environmentally aware has increased sharply from 2019 to the present day.
- **NB:** the question has been rephrased and it not directly comparable

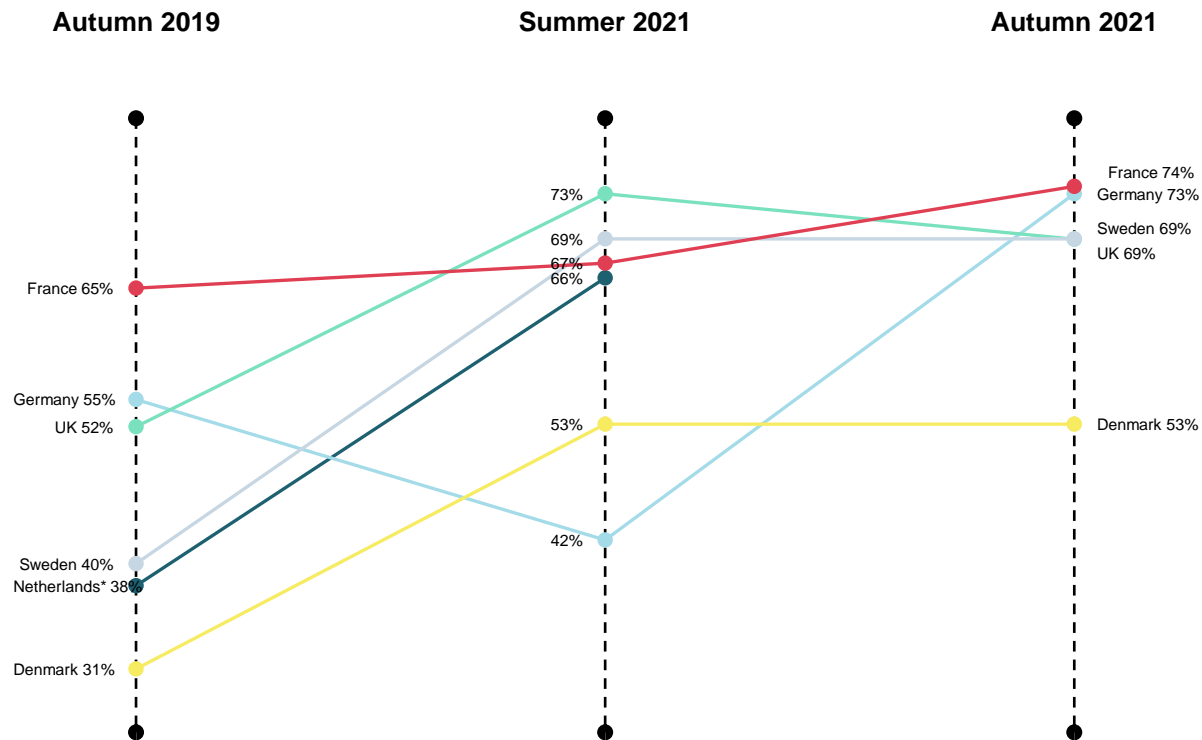


*This page looks at people who are **interested in travelling abroad in the next 3 years***

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

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

Proportion that responded strongly agree or disagree.



* The Netherlands in Autumn 2021 is hidden due to a translation error.

** Phrasing was from 2019: I'm considering changing the way I travel due to concerns about the environment/climate.

More want to stay longer when they travel

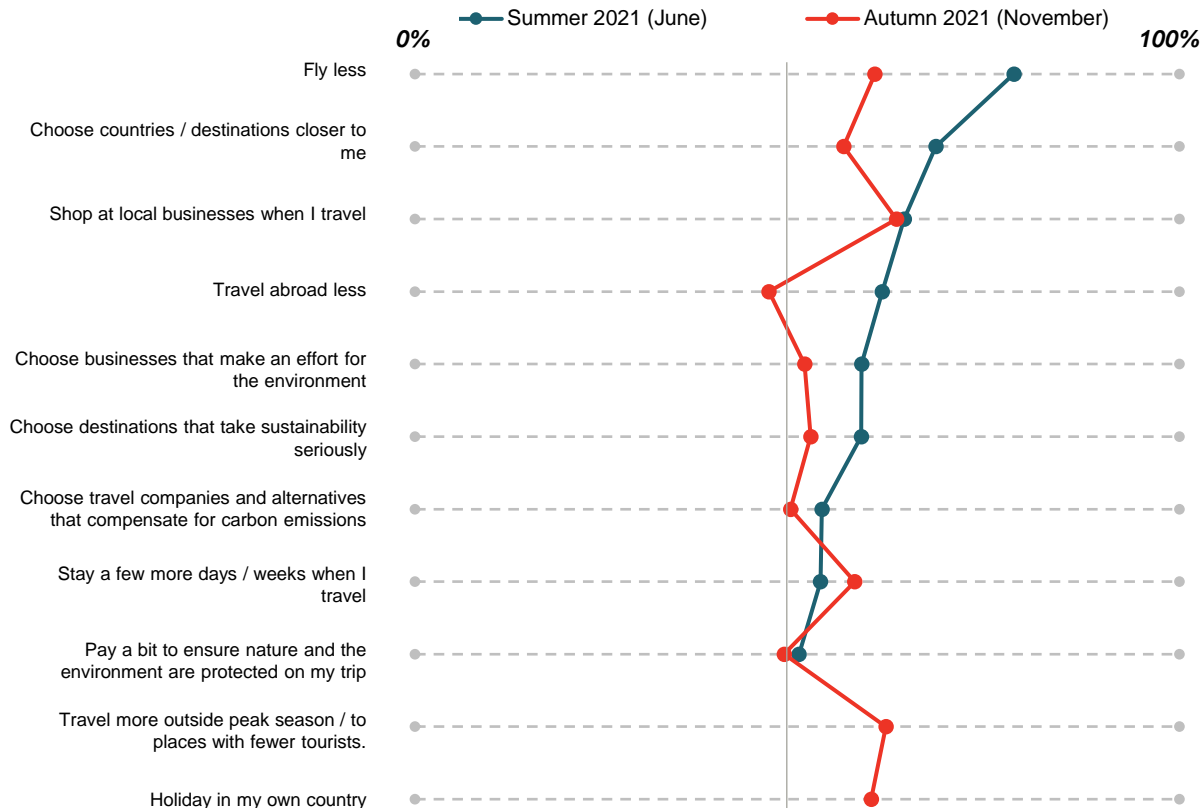
- The proportion who want to fly less and travel abroad less has decreased noticeably since the previous survey. This may be because it is impossible to fly less than people have done recently or because many feel a strong urge to travel and would rather make other changes to avoid the negative effects on the environment, climate and nature.
- It appears that they underlying need to travel may be so strong that people are less willing to fly less and choose destinations that are closer.



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

Will you do any of the following to counteract the way you travel having a negative impact on the environment, climate and nature?

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



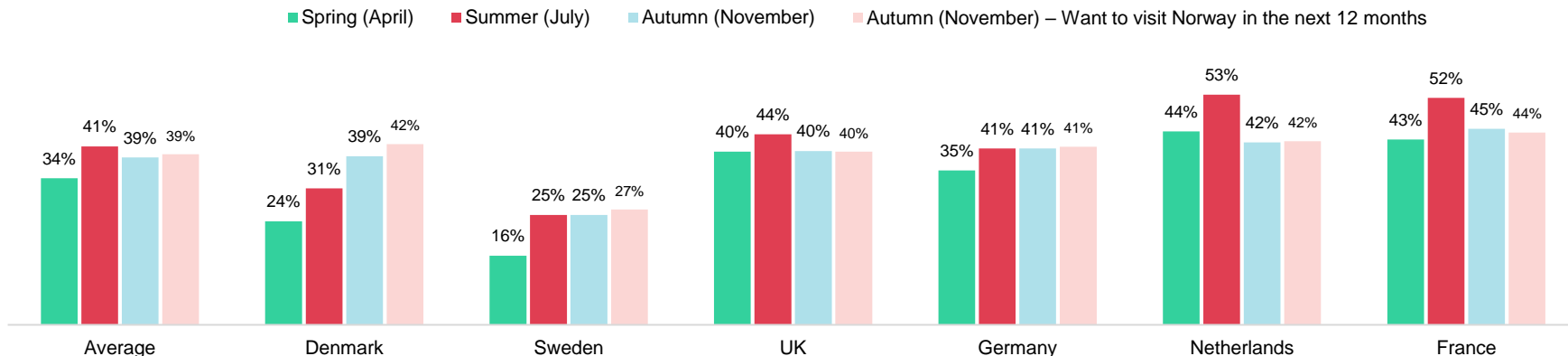
A large proportion prefer package holidays when holidaying in Norway

- The proportion who respond that they want to purchase a package holiday when visiting Norway has been stable in all markets during the pandemic.
- The proportion who want to buy package holiday for any holiday in Norway has increased sharply in Sweden and Denmark.



Those who would like to go on holiday to Norway in the summer season / winter season in the next 5/3 years

You have responded that you would like to holiday in Norway in the next 5 / 3 years. How are you most likely to book your holiday in Norway?
"I would book most of the holiday via a tour operator who can arrange package tours that include most things (e.g. transport and accommodation)"
The proportion who responded 'Yes' of those planning or considering a holiday in Norway in the next 5 / 3 years.



The competition for tourists in the next 12 months

Which destinations are most popular? Who is considering visiting Norway?

Southern Europe most popular

Even though the interest in Norway is increasing, it is also increasing for other countries. Norway is rising in Europe and falling in Scandinavia compared with the survey in June 2021:

DEN: 7th (June) to 9th place (Nov / Dec)

SWE: 6th (June) to 9th place (Nov / Dec)

UK: 17th (June) to 14th place (Nov / Dec)

GER: 16th (June) to 13th place (Nov / Dec)

NL: 15th (June) to 12th place (Nov / Dec)

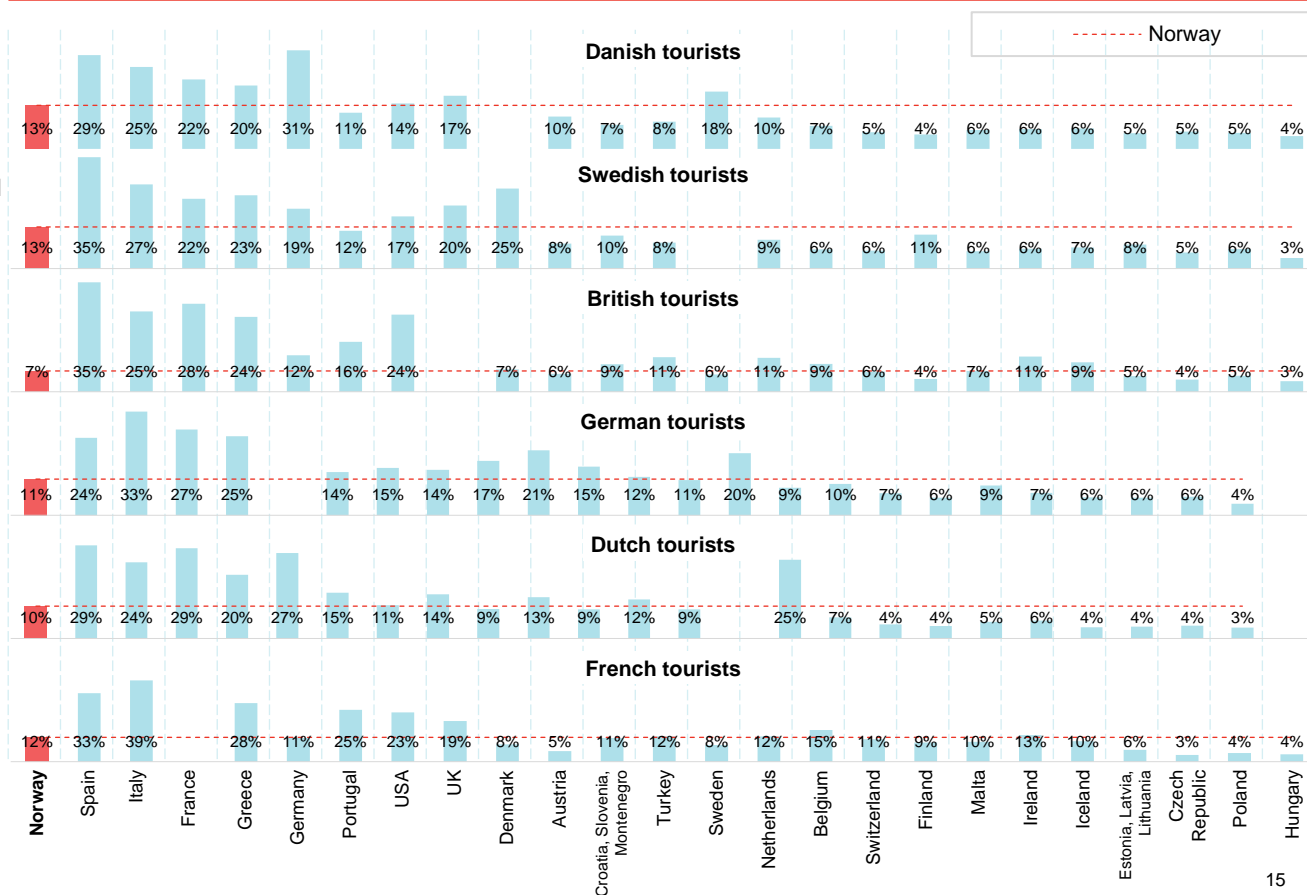
FRA: 14th (June) to 9th place (Nov / Dec)



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

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

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



Those interested in Norway turned their eyes to the north.

Those who respond that they are considering visiting Norway in the next 12 months are also more interested in visiting the other Scandinavian countries.

Spain especially is less tempting for those considering visiting Norway in the next 12 months.



*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?



Destinations being considered by those who want to visit Norway

Rank	Country
#1	Sweden
#2	Denmark
#3	Italy
#4	Germany
#5	France
#6	Spain
#7	Greece
#8	UK
#9	USA
#10	Netherlands



Destinations being considered by those who do not want to visit Norway

Rank	Country
#1	Spain
#2	Italy
#3	France
#4	Greece
#5	Germany
#6	UK
#7	USA
#8	Portugal
#9	Denmark
#10	Netherlands

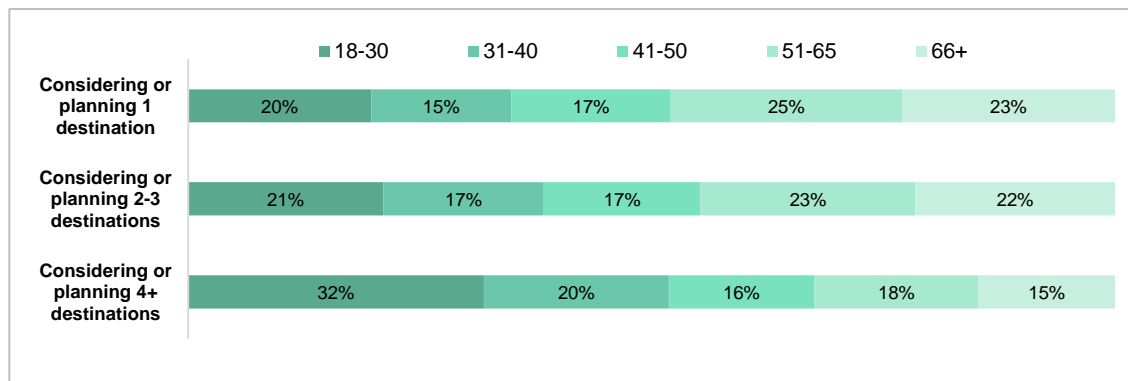
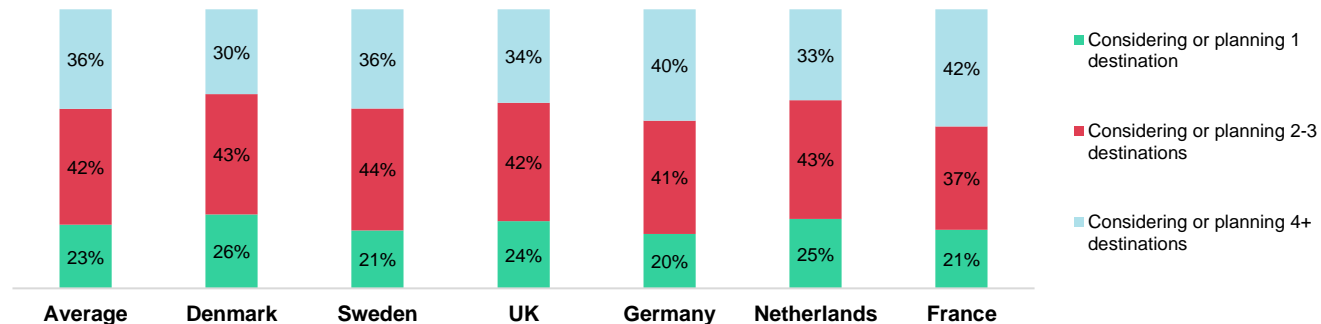
Great desire to travel among those who want to travel in 2022

In Germany and France, 40% are considering no fewer than four or more specific countries / regions from a list of 30 as relevant destinations for the next 12 months.

It is particularly the youngest who consider many countries relevant destinations.

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

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



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

To Norway on a holiday of discovery

- More than half of those who are considering Norway want to travel to explore and discover new things. This is, along with relaxation, the most important holiday for this group.
- With the exception of a family holiday, those considering Norway want to experience more types of holiday than those who are considering other countries.



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

How well do the following types of holiday match the trips abroad you are expecting to take in the next 12 months?

Choose the most important



Those interested in Norway expect more trips – year-round

- Those considering Norway generally have higher expectations of being able to travel during all holiday periods and outside them in 2022.
- Of the Danes planning to travel in the next 12 months, 21% expect to travel in the winter holidays. Among those considering Norway, no fewer than 32% expect to travel abroad during the winter holidays.

When do you expect to travel abroad on holiday in the next 12 months? You can choose multiple alternatives.
Proportion of those interested in travelling abroad in the next 12 months



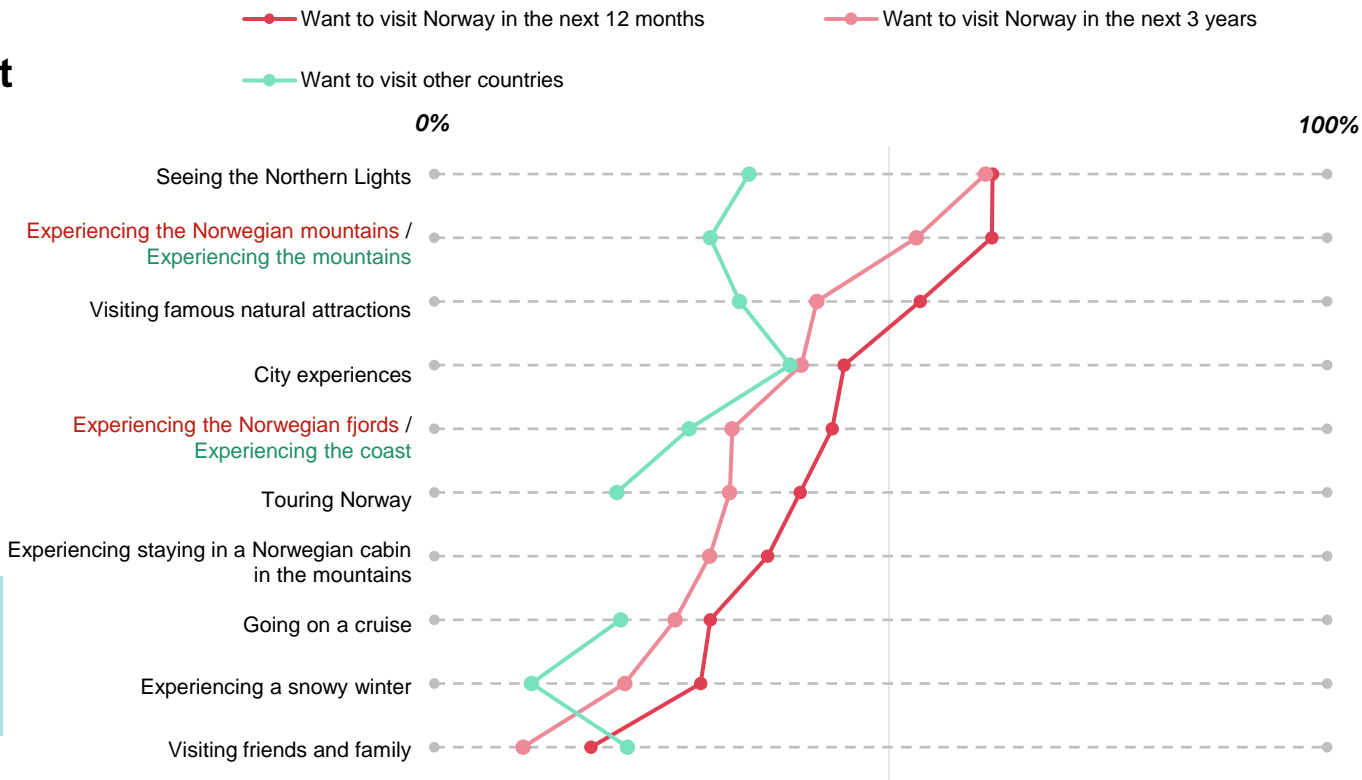
*This page looks at people who are **interested in travelling abroad in the next 12 months***

Fjords and Northern Lights most important attractions for most

- It is the Northern Lights, mountains, historic sites and cultural heritage, as well as outdoor activities in the summer, that attract most of those considering visiting Norway in the next 12 months.
- Common to a majority of the tourists is the fact that they want to experience a lot on a holiday in Norway.

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

The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



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

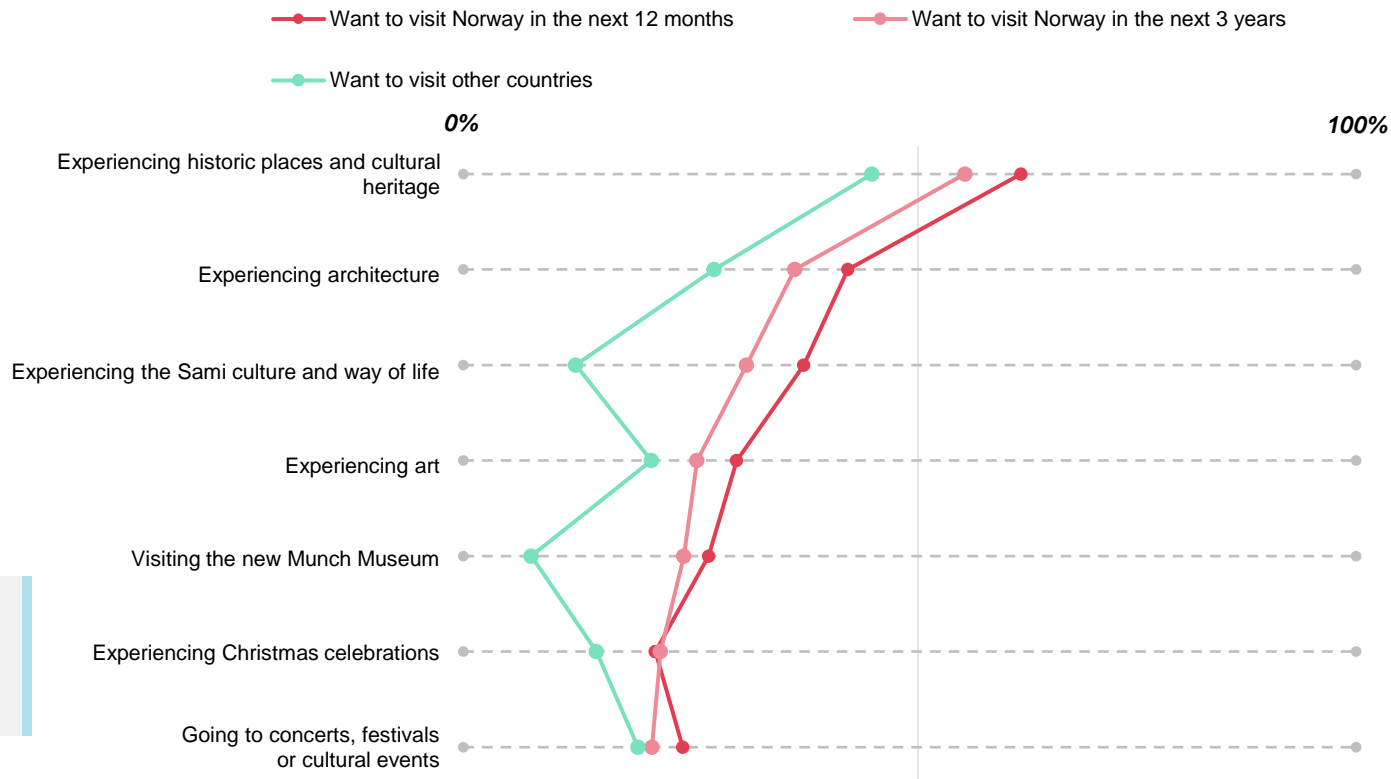
Very many want to experience culture and history in Norway

- Most want to experience both nature and different types of cultural experience on a holiday in Norway.
- Just under 30% of those considering Norway want to visit the new Munch Museum on a holiday in Norway.
- The survey shows that the interest in cultural experiences is high across the countries, although it is particularly high in the UK and France.

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

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

The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



A large proportion want to be physically active, especially in the summer

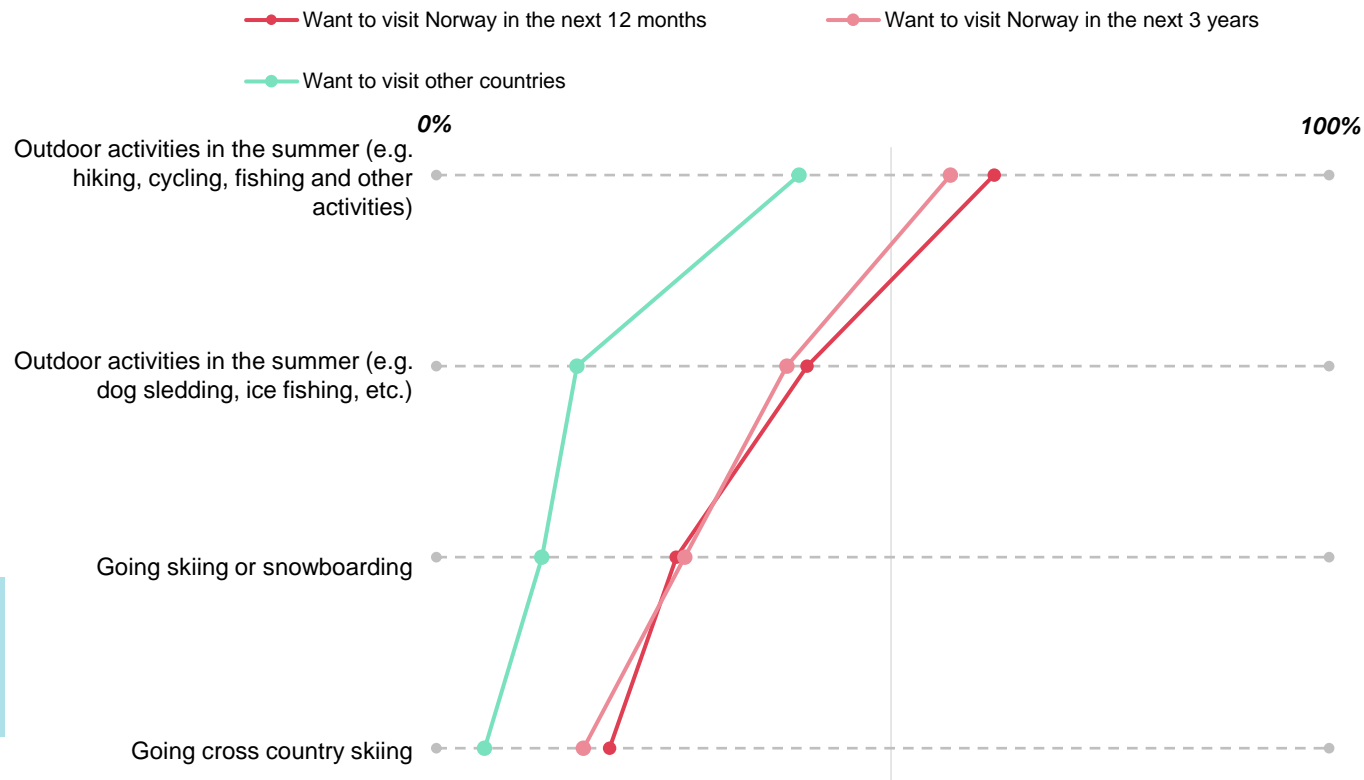
- The interest in alpine skiing is highest in Denmark and Sweden, while the French are far more interested in other outdoor activities in the winter.
- The interest in outdoor activities in the summer is high in all markets, but lowest in Denmark and the UK.



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

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

The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



“Taste of place to get a sense of place”

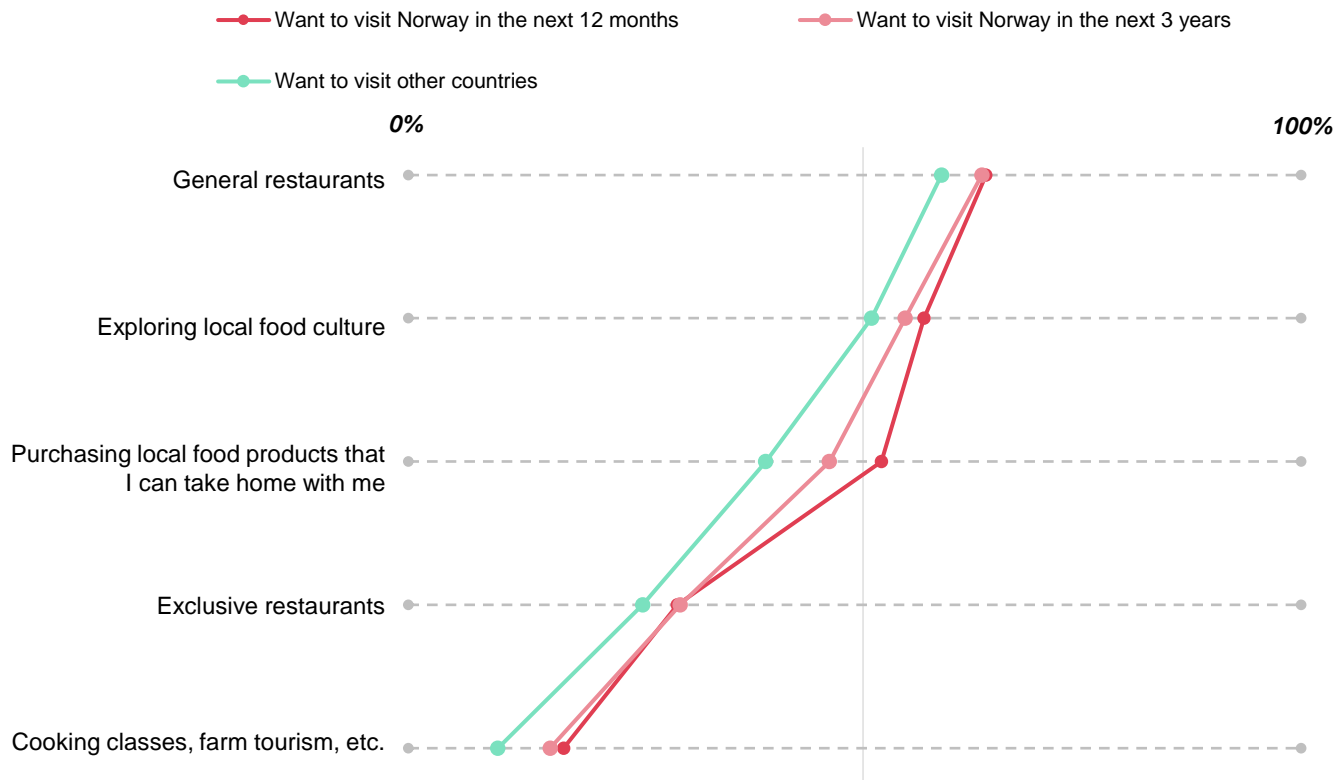
- This is how the World Food Travel Association defines food tourism. It is probably a suitable description for what tourists want to experience in Norway.
- More than 65% of French, British and German tourists want to explore the food culture of Norway. This is not as important for Swedes and Danes.
- The tourists from all markets want to take some tastes Norway home with them.



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

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

The percentages show the average proportion who respond that they will seek out these activities / experiences across the markets



Two out of three are interested in holidaying in Norway in the next 3 years

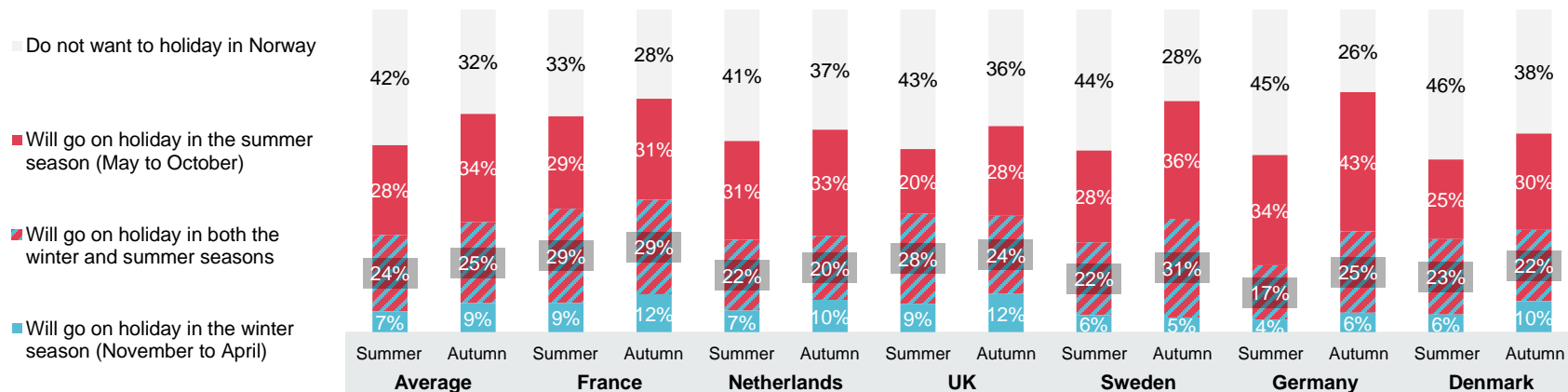
- The interest in Norway has increased significantly since the last survey, especially in Sweden and Germany.
- The interest in holidaying in Norway is greatest in the summer season in all markets, although the interest in holidaying in Norway in the winter season is also very high across the markets.



*This page looks at people who are **interested in travelling abroad in the next 5 / 3 years***

Do you want to holiday in Norway in the next 5 / 3 years in the summer season / winter season?*

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



Those who want to visit Norway in the next 12 months

- Norway is particularly attractive to tourists under 40. The interest declines with increasing age. This is partly explained by the fact that younger people have greater travel expectations for 2022 and are considering more countries than older people.
- For the vast majority it is not a question of nature or culture, rather both nature and culture on a holiday in Norway.
- Those who are considering Norway are more interested in sustainability than other tourists and significantly more interested in this than Norwegian tourists.

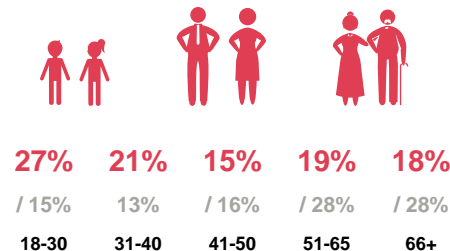
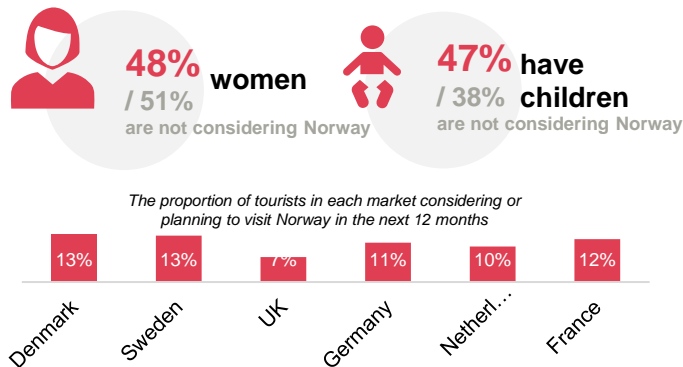
Top 5 activities in Norway

- 1 Seeing the Northern Lights
- 2 Outdoor activities in the summer (e.g. hiking, cycling, fishing and other activities)
- 3 Experiencing historic places and cultural heritage
- 4 Experiencing the Norwegian fjords
- 5 Exploring local food culture

Top 5 priorities for counteracting the travel's negative impact on the environment and climate

- 1 Shop at local businesses when I travel
- 2 Travel more outside peak season / to places with fewer tourists.
- 3 Fly less
- 4 Stay a few more days / weeks when I travel
- 5 Holiday in my own country

Demographic characteristics



Culture enthusiasts are more likely to want to visit Norway

- Those who are considering Norway are hungry for experiences and interested in culture.
- More of them respond that an interest in a specific city, history, exhibition or ski resort could be a decisive factor in their choice of destination.
- Those who chose destinations based on specific interests are also more interested in having a variety of experiences when they are on holiday in Norway and abroad in general.
- This means that it is important to address the needs of the (many) who want varied experiences during an eventful (touring) holiday in Norway. It is also important that those with special interests are able to immerse themselves in these while on holiday, regardless of whether this is looking to experience distinctive architecture, history or art.

Which of the following could in themselves be a decisive factor in where you choose to holiday abroad?

The percentages show the average proportion across the markets



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