



# MARKET: CHINA

25th May 2020

## CHALLENGES

- The governmental restrictions on international travels are still in effect, so the biggest challenge for tour operators **is to survive** as they don't have any income at the moment while they have to bear the financial burden such as rental and labor cost.
- In order to go through the tough time, many of them have turned to do the **domestic travel business**.

## BOOKING SITUATION

The tour operators have no idea when they can be back to work until they get the notice of resuming sales from the government.

At present, **the government still forbids any sales** including pre-sales of outbound travel products.

➤ So, **there is no booking for Norway** at the moment.

## BORDERS & TRAVEL ADVICE

- China has not reopened its border for leisure travel and **there is no specific information about it yet.**
- The official advice for overseas travel is **“try to avoid international travels otherwise should accept 14 day’s quarantine in designated places when occurred”.**
- Currently, reports says China is negotiating agreements with Japan, South Korea and Singapore to resume **necessary business travel.**
- Destinations close to China have been more active in resuming Chinese tourism. The director of Visit Thailand says **“they would resume Chinese tourists' visit to the country as soon as October and encourage small groups”.** The Maldives says **“it plans to open its border in early July and resumes tourism in early October”.**

## OTHER

Although tour operators are staying at home, they are still keen to learn the destination knowledge which could be used for the future development of new products. **So online trainings, webinars and sales supportive materials such as latest images and short videos are welcomed.**



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# MARKET: FRANCE

25th May

# CHALLENGES

## OPERATIONAL CHALLENGES

- The employees are still on **partial unemployment**. **Some travel agencies are closed**. Teleworking is for most of the administrative staff and the manager's office.
- **Less human resources** but still a lot of work to do to be on time when the world will open again.
- Besides the handle of the postponements, the cancellations, and the talks with the insurances, they also **need time to prepare the season for 2021**.
- For the moment they survive thanks to the support of their insurance, the state measures (loans, partial unemployment...) as well as some cash left. **However the situation should not last too long**.

## BOOKING & CANCELLATION CHALLENGES

- Vouchers system valid for 18 months in France. Challenges on **maintaining the same price level** for next year.
- Cancellations with the **providers on land have been done with flexibility**. They mentioned otherwise problems with some airlines.
- **Difficulties to develop 2021** because everything is on stand-By: How will be the new travel rules, what about the airlines and the prices for winter ...?



# BOOKING SITUATION

- **The summer in Norway is dead for the French!** is the reaction of the interviewed TO following the announcement from the Norwegian government on Friday 15th May regarding leisure travel to / from Norway.
- **The majority of the clients postpone their cancelled travel to the next summer season.** Groups are easier to postpone than individuals. Vouchers are not necessarily guaranteed for the same country destination.
- At the moment for the majority of the people **it is too early to think after the summer holidays.**
- **Hopes for autumn winter 2020 – 2021.** Some new bookings have been observed before and during the crisis and **Norway is perceived as a safe country** to travel to. It is important to prepare a plan ( price product, availabilities ... ) to communicate to the TO's when demands start again. This is particularly relevant as we have been pro active in communicating “All Norway All Year” in the past years as well as we observed a **good development of the winter and autumn seasons.**
- A new study made by Horwarth HTL for BPI France – confirms that **French people will prioritize reunion with family and friends in non-commercial accommodation this summer.** International trips for 2020 are expected to drop by 53% . The study also confirms that bookings to tour operators shall **begin slowly from September for travel in Autumn/Winter 2020-2021.**

## BORDERS & TRAVEL ADVICE

- **Domestic situation** : On May 14th the French PM announced that French citizens could go on Summer holidays (July & August) in France and the overseas department. **Per now a leisure travel restriction of 100 km (leisure trips) applies until June 2nd.** The government shall come back on new travel updates this week.
- **Borders with other European countries** are closed until at least June 15th for leisure trips and until further notice for countries outside Europe. **The quarantine rule shall not apply for travellers from European countries.** However a reciprocity rule (**voluntary quarantine**) will be set with other neighbour countries implementing quarantine like UK and Spain.



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**MARKET: Germany, Austria,  
Switzerland**

# CHALLENGES

## Operational challenges

- All tour operators report on short time work for all or most colleagues. **Insecurity** about when business starts again is high, **some shift their business to new products in domestic travel or to close-by-countries that open up borders earlier** (mid June).
- A lot small and medium size tourism companies **face bankruptcy** and existential threats without bookings and income from summer business. About 97% of German travel businesses have less than 20 employees and a **fitting governmental support is missing**. Travel industry waits for rescue package and demonstrates on streets. A voucher system that is covered by the state is supposed to be on its way and might ease the situation a bit.

## Booking & cancellation challenges

- Many tour operators (TO) were frustrated by the Friday press update from Norway concerning border openings. This means for all TO that **summer season to Norway is lost**. Should the borders really open on 20.7. this should be communicated in long term. The biggest challenge is actually the **lack of predictability**, since locks are extended in the long term and openings are only theoretically promised. This particularly **unsettles the guests**. **Even if border openings are indicated, there is no information about the associated conditions**
- Daily work is on : **Cancelling and or rebooking trips up to 15.6.** until the day when Germany is supposed to relax travel restrictions across borders again. **Trips to Norway are cancelled up to 20.7.** Some TO (bigger ones) try to be very flexible in bookings and cancellation conditions to serve the customers best and keep them as customer. Other cannot offer as much flexibility in cancellations deadlines. Airlines still do not pay back pre-payments, neither do some other big carriers.
- Bus tour operators do not only face border closures but also **face restrictions for bus travel**. They desperately wait for conditions to change and also demonstrate for rescue package.

# BOOKING SITUATION

- Some TOs report to work on **products for autumn, winter** (x-mas, new year eve and more) and 2021 and **hope for bookings to start after reopening of borders**. Some TO re-structure their existing products to fit customers wishes even better.
- **Bookings for winter and 2021 are starting**, but very slowly significantly below the previous year's level. This will change only when freedom of travel and specific names for possible conditions have been restored. **TO expect bookings for summer 2021 from September**.
- Some TO report on no booking right now but hope this to change after end of travel restrictions.
- Most TO report on **most rebookings for 2021 (not within 2020)**.
- One TO sees a big chance for Norway **to increase and support autumn/shoulderseason tourism in 2020, if Norway would prepare accordingly and would have tourist attractions/infrastructure open and not closed as normal in autumn**. This might be a new product/possibility for TO as well to send groups.
- Some **TO expect good chances for tourism to Norway in the future (after corona)**, since people will not dare to travel far. **Norway offers big space (little populated) and great nature, appears safe, has a strong government and is easy to reach from Germany/home**.
- One TO also sees difficulties for Norway in the future, when opening up later than other countries, as other destination will open up earlier and even former Norway fans might test out other destinations and then might be lost for Norway in the future.

## BORDERS & TRAVEL ADVICE

- **German federal state has opened borders to some neighbouring countries.** Since 16.5. the border to Luxemburg, Austria and France has been opened up. **From 15.6. more openings are expected.** German federal states have differing opening rules. Most have restaurants open and some have opened hotels. Schleswig Holstein opened for tourism on 18.5., but restrictions concerning number of beach visitors are expected - especially on holidays such as "Himmelfahrt" and pentecost weekend. Not all entrances to the beaches are open. NRW opened up earlier. Niedersachsen allows hotels to open at 24.5. etc. All Corona rules in federal states can be found here: <https://www.bundesregierung.de/breg-de/themen/coronavirus/corona-bundeslaender-1745198>
- **Hygiene rules** and concepts are mandatory everywhere.
- Germans **are not allowed to travel abroad until June 15th.** But they are allowed to travel domestically.
- There are bilateral agreements: Germany opened borders to Austria, France, Luxemburg on 15<sup>th</sup> May. Openings to other EU countries are in process.

# OTHER

If opening up borders the touristical **products should be ready to offer a good customer experience**, so that holiday is really what one expects from it. Quarantine must be removed also when opening borders.

The message of the Norwegian government to go for a Nordic countries solution on opening borders are bewildering, since Iceland and Finland open up earlier for German tourists, even for groups and prepare accordingly. **The opening date for German tourist is not clearly communicated.** A TO offers to test out “social distancing and hygienical correct” trips, if wanted and needed.

A group tour operator states that Germans are willingly to travel - even when facing restrictions. **But safety and closeness to Germany will be important.**

One TO reports an **increase in prices after Corona but sees this as wrong signal** when wanting to restart business.

TOs want to rely on existing partners and **hope for flexible and cost-free re-booking possibilities** if needed.





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# MARKET: INDIA

25th May 2020

# CHALLENGES

- Inspire and encourage travellers once the situation improves that it's safe to travel
- Uncertainty is the biggest challenge and we don't know when the travel eco system will be up and running
- Communication of which borders are open & where is it safe to travel is likely to be a challenge as things improve
- If the airlines & hotels may end up being more expensive than earlier, it will pose a new challenge
- Getting refunds for cancelled bookings is continuing to be a challenge. Either the refunds are stuck with airlines or with some aggregators & one or both may file for bankruptcy
- Rescheduling future holidays to the same destinations

## BOOKING SITUATION

- Depending on the situation by July or August, **we may see travellers planning their holidays from September to December**
- We have done a small research to find out if customers are enquiring about their holiday plans. The response we received was that they are even though it may account for only 25-30% of their enquiries as compared to normal years. Though most enquiries now account for domestic or geographically closer destinations, **we are expecting enquiries for Europe to pick up by September**
- There has been a sentiment of domestic travel picking up in July & we may see international travel pick up by August to places like Mauritius, Middle East, Maldives & Sri Lanka. Europe is only likely to pick up by September. As Central Europe has been badly affected, there is a **growing sentiment about Scandinavia being safe & travellers will consider it**. Products around winters particularly Christmas & New Year along with Northern Lights could be popular

## BORDERS & TRAVEL ADVICE

- India closed borders for all international flights, except cargo, **until May 31**
- On March 17, India had suspended issuing visas to citizens of France, Spain and Germany until further notice. **This will be reviewed in the first week of June.**
- Domestic flights are likely to start in early June
- The Indian government stepped up **tougher border control measures** to combat the Covid-19 outbreak as the number of patients is rising mostly from travel history to affected countries. The fresh restrictions both for outbound and inbound travel now include major European countries including France, Spain and Germany
- An advisory has been issued for all **incoming international passengers returning to India to self-monitor their health** and follow the recommended “DOs and DON’Ts”
- The advisory also calls for passengers with travel history to China, Hong Kong, Republic of Korea, Japan, Italy, Thailand, Singapore, Iran, Malaysia, France, Spain and Germany to **undergo self-imposed quarantine for a period of 14 days from the date of their arrival**, and their employers to facilitate work-from-home for such employees during this period

## OTHER

- The world post COVID-19 would be a different place & the travellers may have changed consumption or travel patterns forever. **Travelling as FITs or with small family & friends' groups for longer duration** or self-drive may be some of the new trends to watch out for. Travel packaging would undergo a complete change. Focused on **conscious, sustainable & environment-friendly holidays** may become more important than ever before
- **The travel fraternity in India has been extremely positive.** They have communicated in videos or social media to stay safe for now. There have been a lot of creative videos engaging them to dream now and travel later. The airlines are already waiting to launch campaigns with attractive promotions once the situation is normal
- We are trying to make the most of the given time and situation by conducting **destination training webinars and online sessions for our travel trade partners.** The idea is to enhance their knowledge & skills, keep them active & motivated and future-ready to be able to grab opportunities as soon as the market picks up. We are targeting to train in excess of 2000 travel professionals by the end of July
- The COVID-19 has provided us with this **one opportunity of additional time and detailed training sessions.** While typically a training session lasted an hour in normal situations, today, we have had deeply engaging training sessions for up to 4 hours

## OTHER

- Tour operators are introducing some packages for **solo destinations** that may allow minimum air travel, longer stay, less check-in check-out & hence, **make them feel safer**
- Group travel may see a trends with **a full-size bus with 50% occupancy** that allows social distancing & safe travels
- For early bookings to Norway, it will be imperative for us to create a strong communication that sounds **both welcoming & that we are ready to receive them**



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## **MARKET: Italy**

*Per 25th May 2020*

# PRESENT CHALLENGES

## Re-opening of borders

- **Uncertainty related to the reopening of borders** around Europe/Schengen area and secondarily also the rest of the world.

## Situation after the re-opening

- **Who will be there and how?** The longer it last, the harder it will be to recover.
- The **purchasing power** of the travellers
- **Liquidity** of the companies (TOs and TAs).
- Flight connections.

## Governmental measures - effects

- How will the situation evolve after the **expiry of social safety** nets implemented by the Italian government.
- Real effect of governmental measures to help the travel industry: more focus on domestic market **with big risk to forget the travel industry focusing on outgoing.**

# BOOKING SITUATION

## In general:

- People **are not booking any trips** at the moment, there is too much uncertainty.

## Regarding Norway:

- Italian tour operators **have cancelled or are cancelling all bookings until June 20<sup>th</sup>** after the last communications from the Norwegian Government
- Tour operators, travel agencies and clients are still hoping to be able to get to **travel to Norway late this summer.**

# OTHER

## Border situation and travel advice:

- Italy is planning to open borders for all European/Schengen countries **from June 3<sup>rd</sup> without any quarantine.**
- Italy is pushing that no European country inside EU will have special agreements one with the other/s.

## Information to the Norwegian travel industry:

Theme webinars related to presentation of **new products towards product managers** are very much appreciated.



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# MARKET: JAPAN

25th May 2020

# Sum-up of the current situation

- *What are your biggest challenges right now?*
  - *Possible 2<sup>nd</sup> wave of the pandemic*
  - *Possible travel restrictions*
  - *Possible bankruptcy within travel agents*
  - *Possible fare increases due to virus prevention measures (less seat capacity in airplanes, coaches, restaurants etc)*
- *How are the bookings in the future, and when do they start? (this fall or from next year?)*
  - **SERIES**
    - *Some agents have released Autumn Tours and Winter tours, but they will need to adjust as these were launched in April*
    - *Considering launching new tours asap when the overseas travel open*
    - **FOCUS ON:**
      1. *Domestic for Summer / Autumn*
      2. *Short haul overseas travel (Taiwan, Korea) for Autumn*
      3. *Europe – depending on flights and restrictions*
  - **MICE/ADHOC**
    - *CXL Mice will be postponed till 2021 or 2022*
    - *CXL AdHoc will be postponed to Q3 2020 and 2021, og given up to materialize*
    - *School Tours will be shifted to domestic or short haul destinations*
    - *Small size AdHoc groups will be gradually recovered after summer*
  - **FIT**
    - *Individual travellers incl business travellers will start to travel when necessary restrictions removes*

# CHALLENGES

- Possible 2<sup>nd</sup> wave of the pandemic
- Possible travel restrictions
- Possible bankruptcy within travel agents
- Possible fare increases due to virus prevention measures (less seat capacity in airplanes, coaches, restaurants etc.)



# BOOKING SITUATION

## Series

Some agents have released **Autumn Tours and Winter tours**, but they will need to adjust as these were launched in April

Considering launching new tours asap when the overseas travel open

### Focus on:

Summer & Autumn : domestic travel

Autumn: Short haul travel overseas (Taiwan, Korea)

Autumn: Europe – depending on flights & restrictions

## MICE/ADHOC

CXL Mice will be **postponed** till 2021 or 2022

CXL AdHoc will be **postponed** to Q3 2020 and 2021, og given up to materialize

School Tours will be shifted to **domestic or short haul destinations**

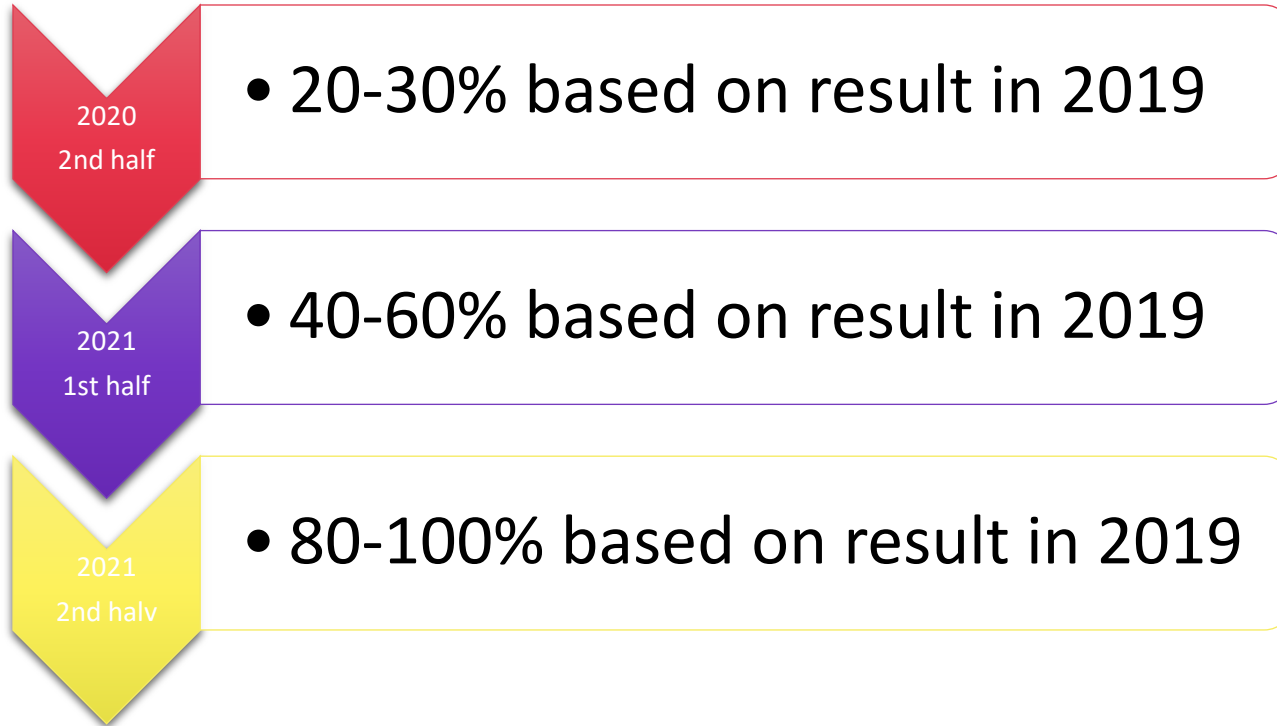
Small size AdHoc groups will be gradually recovered after summer

## FIT

Individual travellers incl business travellers **will start to travel when necessary restrictions removes**

## Sum-up of the current situation 2

- *Forecast outbound business to Europe (Tumlare Corporation, Japan)*



# Sum-up of what they say they need from Visit Norway and other relevant information you receive in the dialogues

- *Travel promotion – needing support from NTOs, trade partners etc*

|                 | Apr | May | Jun | Jul                 | Aug             | Sep | Oct  | Nov            | Des      | Jan-Mar    | Apr-Jun   | Jul, Aug |
|-----------------|-----|-----|-----|---------------------|-----------------|-----|------|----------------|----------|------------|-----------|----------|
| TOPIC           |     |     |     | Summer vacation     |                 |     |      |                | New Year | Spring vac | GW        |          |
| DOMESTIC TRAVEL |     |     |     | BIG TRAVEL CAMPAIGN |                 |     |      |                |          |            |           |          |
| OVERSEAS TRAVEL |     |     |     |                     | KOREA<br>TAIWAN |     | ASIA | EUROPE & USA   |          |            |           |          |
| INCOMING        |     |     |     |                     |                 |     |      | CHARTER FLIGHT |          |            | All World |          |

# OTHER

## Preferable destinations after Covid-19:

- DOMESTIC:
  - **Less crowded destinations**, without using public transportation
  - **Hiking and camping** in the mountains with few people
  - Choosing accommodation with **low risk of infection and avoiding buffet**
- OVERSEAS:
  - **Safe areas**



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## **MARKET: Russia**

*Per 25th May 2020*

# CHALLENGES

## Overcoming the crisis

- The biggest challenge is **to overcome the crisis**
- Russian tour operators hope to keep the company and continue their work after the crisis. The main challenge is to **survive a year without profit.**

## Refunds & re-bookings

- Many tour operators have difficulties to refund money for the summer bookings, they offer to **rebook the trip** to the end of this year, or to the 2021.
- Some tour operators have challenges to rebook flight tickets in Norway (Norwegian, SAS).

## BOOKING SITUATION

- For the time being Russian tour operators do not have any new bookings on future trips.  
**Completely stop!**
- When the border will be open again, the sale for the autumn and winter products will start. **Not earlier than August/September 2020.**
- **After New Year 2021** – the sale of summer products 2021 will start in Russia.



# BORDER SITUATION

## Border situation & travel advice

- According to representatives of the Finnish Consulate General in St. Petersburg, the issue of lifting restrictions on crossing the **Russian-Finnish border has been postponed until June 14, 2020.**
- The largest Russian airline Aeroflot suspended international flights up to **August 1, 2020.**
- The domestic market will probably be re-opened from **June 1, 2020.**
- Travel advice from the Russian government – **stay at home or travel in Russia.**

# OTHER

## Information to the Norwegian travel industry

- Do not give up but **think about the future. People still will be traveling** in the future.
- There are some **uncertainties about Norwegian suppliers**: who will survive and who manages to overcome the crisis. It is important for tour operators' programs to know in order to make new bookings for the next season. The information should be structured by regions.
- Tour operators are requested to get **new rates for 2021**.
- Tour operators are **hungry for digital activities** (webinars, Workshops) with Norwegian suppliers about new programs, new products like GO VIKINGS and other thematical trips.



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## **MARKET: Spain**

26th May 2020

# CHALLENGES

- **Trying to survive** ( The Spanish government promise cash packages)
- Trying to **maintain the staff operative** ( The Spanish government support the salary of the employees in certain percentage )
- Trying to **convince the clients to postpone the trip instead of cancel it**, but most of them want their money back, which is impossible for the tour operator and travel agencies to accomplish due to the facts that the clients money are in "other hands" in this moment. ( Air companies, different suppliers, etc....etc.....)
- Trying to **sell the already "open destinations"** ...Slovenia, Switzerland, .....

## BOOKING SITUATION

- The booking situation has exploded this week, ( from yesterday 25<sup>th</sup> of May) after the Prime Minister press conferences, where Mr. Sanchez said to the Spanish that from the 1<sup>st</sup> of July they will be able to travel and have holidays
- The majority of the bookings were made in Spain, most of the OTA's web pages "crash down" like Booking.com , Logitravel, among others.
- The best accommodation were apartments, Bed & Breakfast, rural houses, and hotels in this orders

## BORDERS & TRAVEL ADVICE

- Spain will **open to the world the 1st of July** 😊
- Before the first of July, potential tourist have to respect a quarantine periode of 14 days
- At the moment Spaniards can not cross regional "borders"
- Spain is divided into different zone and phases, for example Madrid is in fase 1 while Canarias Island are in phase 2. **Different phases allowed different kind of mobility and business**

## OTHER

- ✓ Tour operators need fresh and official information from Norway and from Norwegian suppliers regarding the post covid travelling rules
- ✓ Webinars are more popular than ever. The content are basically focus on the post covid situation
- ✓ Tour operators are expecting Norway to open borders in a bilateral way
- ✓ FIT or small group will be the trend of the new season, small accommodations like B&B, cabins, apartment are the most demand





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**MARKET: 22 th of May - Sweden**

# CHALLENGES

## The biggest challenges remain:

- Trying to get through this crisis alive **without any income but only costs**
- Concerns are about **losing employees**
- **No borders opening** for leisure travel before end of year.

# BOOKING SITUATION

- Trips abroad to be executed **from end July 2020 are not cancelled in most TOs portfolios**, as travel restrictions are set for 15/7.
- Special interest niche **TOs report 90% rescheduling** and a **very good booking prognose for 2021** .
- General niche TOs report **more cancelations than rebooking/rescheduling** and have a struggle to get bookings for 2021.
- Buss TOs that have other possible income (local public transport agreements) than Leisure Travels **have a better chance to survive** for a longer period with travel restrictions.

## BORDER SITUATION

- *Per today Sweden and UD discourages abroad travel till 15/7. We hope to get further information beginning of June.*
- *The domestic travel advice is 2 h from your home.*
- *We follow the discussion about open borders between Nordic countries closely.*

# OTHER

In the dialogue with Swedish tour operators, they talk about the different phases they have been going through:

1. **Chock:** Cancellation, bringing guests home, cost control
2. **Survival:** Plan to survive, keeping business alive, what to do during pandemic
3. **Limbo:** Plan for post-corona, what position can we take, what do our clients wish for, which suppliers will survive, what to focus on.
4. **New Normal:** no one knows only speculations.

**The current status is phase 3.** A limbo situation where extensional issues and questions are raised. For those that see they can survive this year with the current situation and actions taken, are **now looking for new cooperation and aim for developing a product portfolio** they think will be the most relevant for their clients in a post-corona time.

## **Sum-up of what they say they need from Visit Norway and other relevant information you receive in the dialogues**

You can read about one indepth interviews with important actor in the Swedish market:

[RK Travel Group \(Wholesales agent in Sweden\)](#)



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## **MARKET: UK, leisure**

*Per 25th May 2020*

# CHALLENGES

## Operational challenges

- Many staff are on furlough which puts a **lot of pressure on the rest of the staff**. It's been a huge job contacting all customers who were due to travel and advise them on their options.
- Most tour operators **have not received any refunds from airlines** since March and are still waiting.

## Booking challenges

- **Flights:** Norwegian and SAS schedules are **available ONLY 1 year in advance** which makes things difficult. Ryanair and Wizzair have now published more than a year in advance which helps a lot.
- **Accommodation:** Many hotel rates are **not available yet for 2021** via booking systems, but it usually works to contact the hotel directly.
- **Re-booking:** There are **availability issues for next year**. Tour operators wish to book customers that are re-booking for summer 2021 asap as they think big demand might be an issue.

# BOOKING SITUATION

- Most have cancelled all departures up to 30 June and **suspect they will cancel July and August** in due course.
- Many customers are **happy to re-book** (but mainly for same time next year). Priority now is to get the packages for 2021 priced and ready. One tour operator say 'most of the Norwegian summer itineraries finish in September so we don't have may bookings as yet for these later season dates. They tend to come in late spring but haven't due to the corona crisis.' **Norway winter holidays will be on websites soon.** They think the winter season will be quieter than usual but **hoping to get some Norway bookings in.**
- **There aren't many new bookings** as customers are unsure about the future. Norway's travel ban until 20 August will not only affect Norway but the trips that go to Scandinavia which include Norway.
- Tour operators haven't really had any new bookings to Norway during lock down but on the other hand **no cancellations for the autumn/winter season yet.**

# OTHER

## Positive image of Norway:

Another tour operator says “It’s been wonderful to see the **travel industry working together** to get a good and fair solution for everyone”.

- One tour operator sates ‘**Norway has done well this year** especially given the public positive perception of how Norway handled the pandemic.’
- **Space, nature and outdoor activities** will be of high demand.

## Information for the Norwegian travel industry:

- Encourage local suppliers, hotels and activity providers, to have **the rates ready for 2021 and keep the rates the same as this year** for those who are postponing their holidays to next year.
- **High end, self-contained cabins/apartments and chalets style accommodation** and possibly self-cater can be on high demand once people start to book again. We anticipate people wanting to base themselves ideally in a self-contained unit for their family.
- One tour operator speaks of the great success they’ve had with their rail itineraries from London and would like to develop similar road-trips from London even to Scandinavia as **people begin reviewing their relationship with flying**. They are searching for the best options for **traveling to Norway by road, rail and sea**.



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# **MARKET: USA & Canada**

25th May 2020

# CHALLENGES

- Right now the biggest challenge remains **survival**. Companies are still trying to figure out how to **get through this crisis alive**.
- Beyond that, the largest concerns cited include:
  - cash-flow
  - Income
  - losing employees
  - **potential second wave of COVID-19 in the fall**.

## BOOKING SITUATION

- 57% of bookings have **been rescheduled, rather than cancelled.**
- 92% of rescheduled bookings are **delayed a full year to 2021.**
- 60% reported prioritizing a **focus on generating long term business for 2021**, rather than salvaging short term business for 2020
- 76% report seeing a **specific opportunity for the Nordic countries** (Denmark, Sweden, Norway & Finland) in a post COVID-19 world.
- 52% say they **will prioritize Norway** as a destination when borders open again



# BORDERS & TRAVEL ADVICE

- The state of US borders is a major question mark. There seems to be **no ongoing long-term strategy** for how to manage the opening of America.
- As all 50 states are at different stages of dealing with this pandemic, there is **no single set of rules for the country as a whole**.
- **Travel advice varies wildly from state to state**. Some states are reopening almost everything. Some have yet to reopen anything at all. Moving forward, **a state-by-state or regional approach** to dealing with the US will be necessary.

## OTHER

- 60% want **webinars and ongoing education**.
- We are seeing a strong preference shift towards **individual, small group and FIT travel**, away from larger group travel filled with strangers.
- We are also hearing many operators that report a normal target demographic of 55+ now looking to **re-focus on younger travellers** they perceive may be quicker to consider international travel again.



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