

Visit Norway Italy

Milan, 12th June 2020

June 3rd

Phase 3... Italy restarts

Phase 3: what does it mean...

- **June 3rd**: It's now possible to travel around Italy. Italy reopened the borders for EU and Schengen citizens, without any quarantine.
Hotels, restaurants and bars open again (today 90% of bar and restaurants are open while 60% of hotels are still closed).
- **June 15**: Face masks are no longer mandatory in most of Italy except indoor where are still required (cinemas, theatres, shops etc).
- **June 15th** : Cinemas and theatres , reopen. Max. 200 people indoor and 1.000 outdoor. Distance: 1m.
- **July 15th**: Opening of discotheques. Distance: 2m.

Travelling in Italy from 3rd of June

- **Trains:** High speed trains are starting to operate again and regional trains are operating with 100% of the fleet.
- **Airports:** 24 Italian airports (the main ones) are fully operational. Some limitations for people travelling to Sardinia until **June 12th**.

Flights: still not normal but...

- **SAS Scandinavian Airlines:** Opens up **Milan-Copenhagen** from **15th June** (Monday, Wednesday, Friday e Sunday)
- **Lufthansa:** Lufthansa has been one of the few companies operating during the lockdown.
The Lufthansa Group will operate from and to Italy with **241** flights per week starting from the month of July.
- **Air France-KLM Group:** Starting from **1st June**, the group will gradually resume connections from Milan Malpensa airport and, by the end of June, will operate eleven weekly flights to Paris Charles de Gaulle and one per day to Amsterdam Schiphol.
- **KLM:** starting from **1st June** operates daily flights to Rome Fiumicino, Milan Malpensa, Venice and Florence.
KLM will also reactivate connections with Bologna, Cagliari, Catania and Genoa in July.
- **Air France:** starting from **8th June** Air France will gradually resume connections from Naples airport to arrive, by the end of the month, to operate one flight a day to Paris Charles de Gaulle.
- **Brussels Airlines:** reactivate flights on **15th June**. The airline will offer a summer flight plan, which will cover approximately 30% of the summer program originally planned by Brussels Airlines in Europe.
Between 15th June and 31st August, the airline will gradually add destinations to its flight network.
In Europe, a total of 45 destinations will be covered in 20 countries including Spain, Portugal, Greece, **Italy**, France and Denmark.
- **Ryanair:** will start again connections with Italy from **21st June**, will increase the number of routes and their frequency starting from 1 July, reaching 500 routes, as an integral part of the operating for summer 2020.

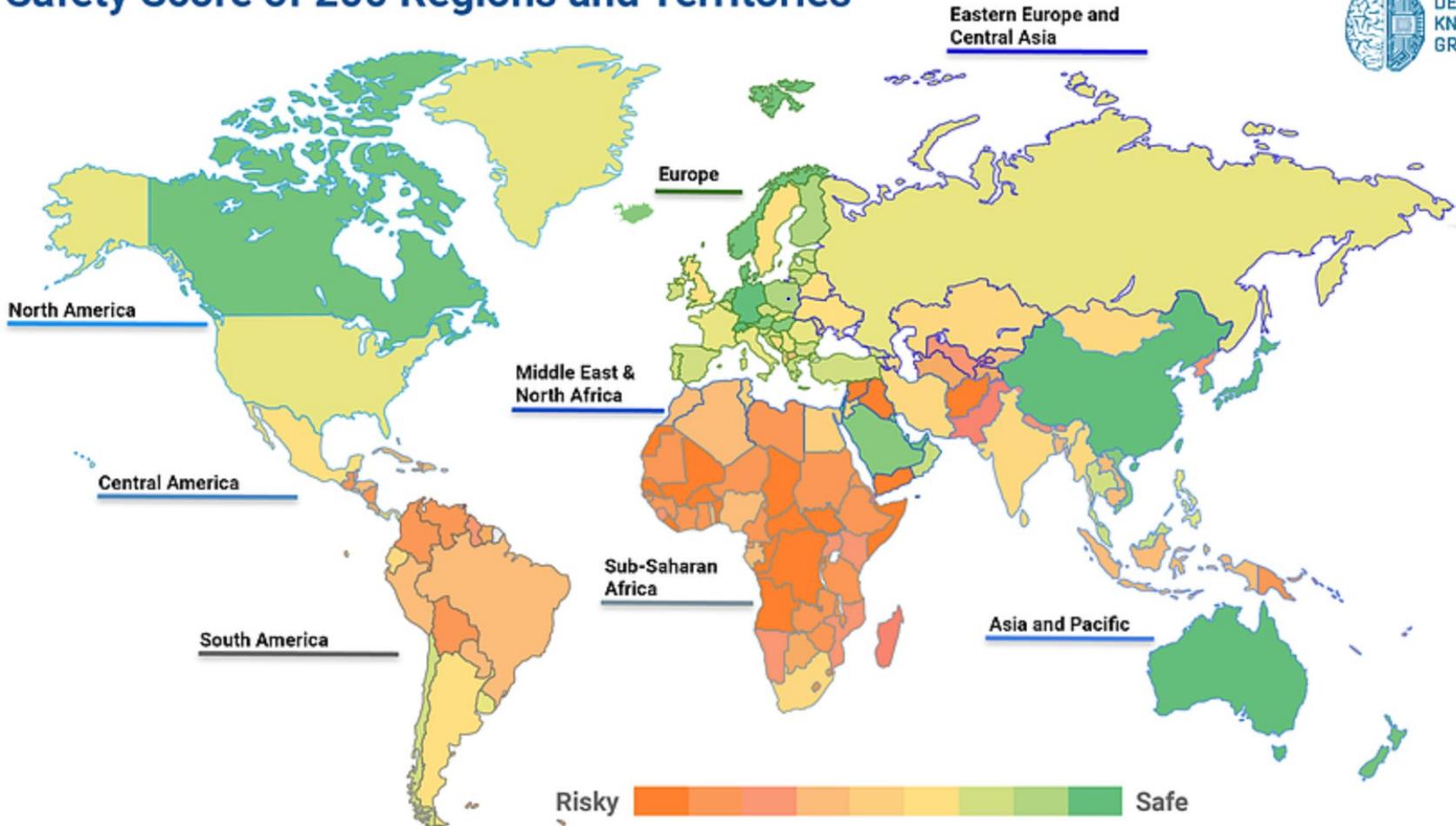
Starting to open the borders...

- Already **open** to Italian tourists:
Albania, Croatia (with some restrictions), Estonia, Lettonia, Lithuania, France, UK (quarantine), Romania, Serbia, Slovenia, Sweden
- **From 15th June**: Austria, Belgium, France, Germany, Greece (maybe Jul 1st) Iceland (Mandatory test) Kosovo, Latvia, Holland, Ireland (quarantine), Poland, Slovenia (quarantine). Switzerland, Turkey.
- **From July 1st**: Spain, Malta
- **From Jul 20th**: Cyprus
- Countries with **still closed** borders: *Belgium, Bosnia, Denmark, Finland, Montenegro, **Norway**, Poland, Czech Republic, Russia, Slovakia, Ukraine and Hungary.*
These are measures that could be changed in the coming days, also given the EU mediation that pushes for a common line linked to epidemiological criteria.



Safety score travel

Safety Score of 200 Regions and Territories



News from the market

News from the market after the virus

- Even with the start of phase 3 the way to go out from the crisis is still long.
- Tourism is still under pressure with many companies on the verge of bankruptcy.
- Most of the tour operators and travel agencies staffs are still furloughed or on temporary layoffs.
- Travel agencies are open but at the moment few business.
- Expectation to restarting little by little.

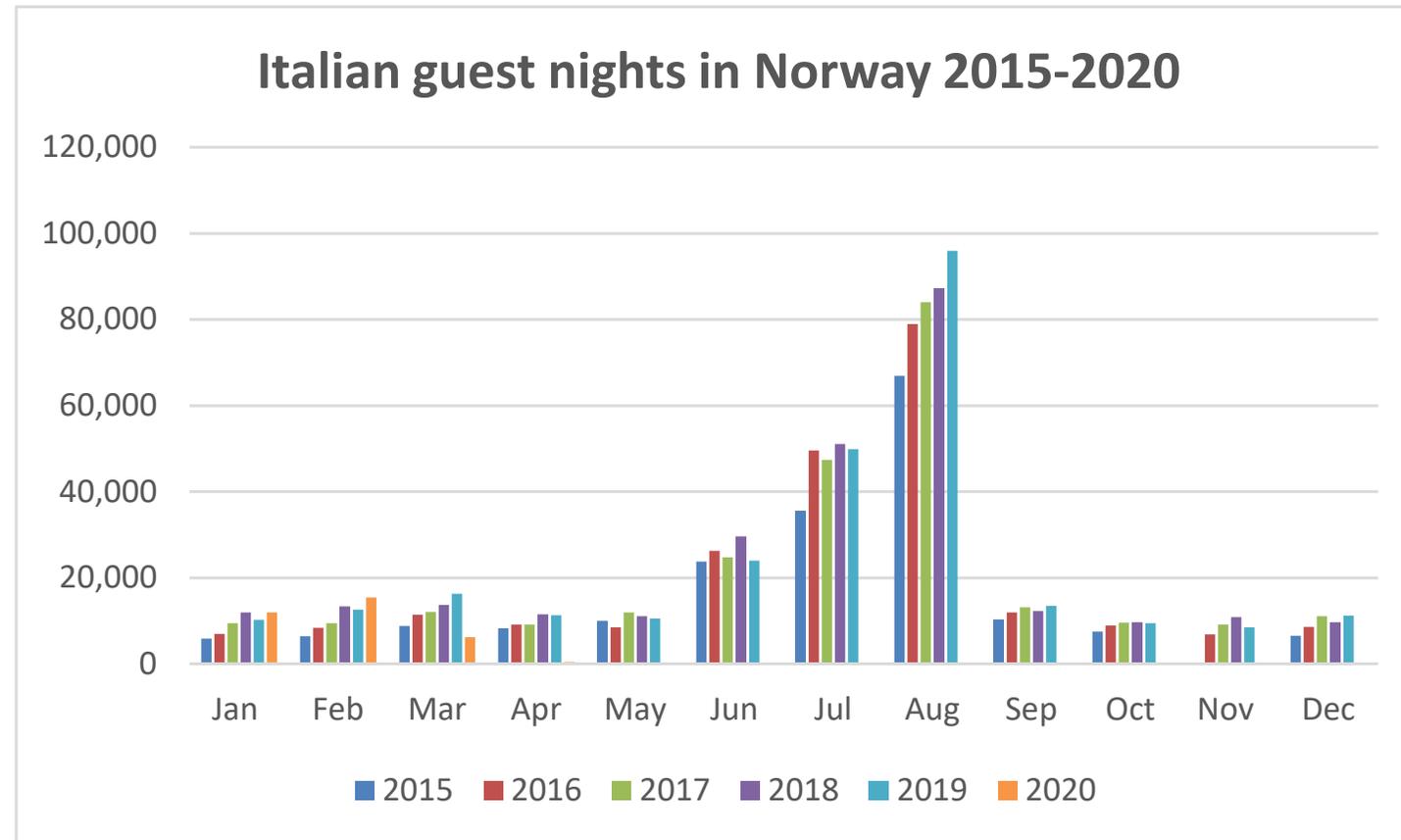
News from the market after the virus (Norway)

- At the moment all the trips booked to Norway by Italian tour operators until end of July have been cancelled.
- The bookings for the summer have completely stopped since the situation is so unclear.
- TOs are still hoping that there will be some traffic in August/September (mainly FIT and not groups).
Waiting for news from the Norwegian government.
- Specialized Tour Operators are focusing on the next winter season and the interest is very high.
- Specialized Tour Operators are starting to have requests for Iceland which opened for tourists (even if with restrictions).
- Short/medium haul trip will start before which will be good for countries like Norway.

Looking at the future...

Starting from...

- Statistics regarding Italian guest nights in Norway in February 2020 up with **23%**
- Even if most of the traffic is taking place in the summer season there has been a **huge interest in Norwegian winter** (Northern lights but not only)
- Willingness from the travel trade to sell winter products **not only in Northern Norway** (increasing number of Italian TO programming winter in the fjords).



And not forget that...

- Norway is an **attractive new** destination: high percentage of newcomers among the Italian tourists coming in Norway.
- They **travelling around** Norway: Vestlandet (70%), Oslo (58%), Nord-Norge (51%), Trøndelag (41%).
- Very **satisfied** of Norway as a travel destination.
- 1 out 5 book the trip through **travel agency/tour operator**.
- 3 out of 4 main accommodation **hotel**.
- On average Italian are spending around **10 days** per trip in Norway
- Age of travelers: **82%** under 55 years old
- Daily expenditure per person during summer holiday **NOK 1.385**
- More than ever Norway is seen as a **safe** holiday destination.

And not forget that...

- Increasing number of Tour Operators programming/selling Norway.
- Still committing on the destination:
- Ex: Giver Viaggi e Crociere
- **6 winter charter flights** from Milan – Tromsø with the following dates:
- 04-08.12.20, 15-19.02.21, 19-23.02.21, 23-27.02.21, 27.02-03.03, 03-07.03.21
- Tour to Svalbard in connection with charter flights.
- **Summer 2021: 7 charter flights:**
- Malpensa – Tromsø: 05.07.21, 19.07.21, 02.08.21, 16.08.21
- Malpensa - Bodø: 12.07.21, 26.07.21, 09.08.21

Insights...

Survey - Outdoor 2020

- It will be an unusual summer that we are going to live, marked by the coexistence with the coronavirus. Among the many unknowns created by the health emergency, one thing is certain: **the holidays will be closer, slower, aware and safe.**
- In this scenario there is a sector of the travel industry in Italy that more than any other today seems to respond to the needs of the traveller, in compliance with current safety standards: open air hospitality. A sector that, continuing a path of growth and redevelopment now underway for some time, on the eve of the next season is a candidate as a possible alternative for a new way of experiencing the holiday made in Italy.
- **DOMESTIC OUTDOOR TOURISM:**
- Turnover of outdoor tourism in 2019 around 8.5 billion euros (of which 5.2 billion euros for hospitality services and 3.3 billion euros for catering services), with a share of trips to Italy that wins 25% of the total: of the almost 80 million trips of Italians to Italy and abroad last year (Istat, February 2020), 20 million were outdoor (estimate on stays in villages and camping and traveling trips made with caravans and the like) for a total of 92 million overnight stays, equal to 23% of the total.
- Longest outdoor holidays in the last year are summer in eight out of ten cases (from June to September), carried out in Italy for the same share, with relevance of **Puglia** (13%), **Tuscany** (11%) and **Sicily** (10%). **69%** of them were mainly beach holidays and made in pairs (**53%**) or with the whole family (**34%**). The mountain was chosen by **16%**, followed by cities and places of art with **12%**.

Source: Tourism Observatory By Human Company in collaboration with Institute Piepoli .

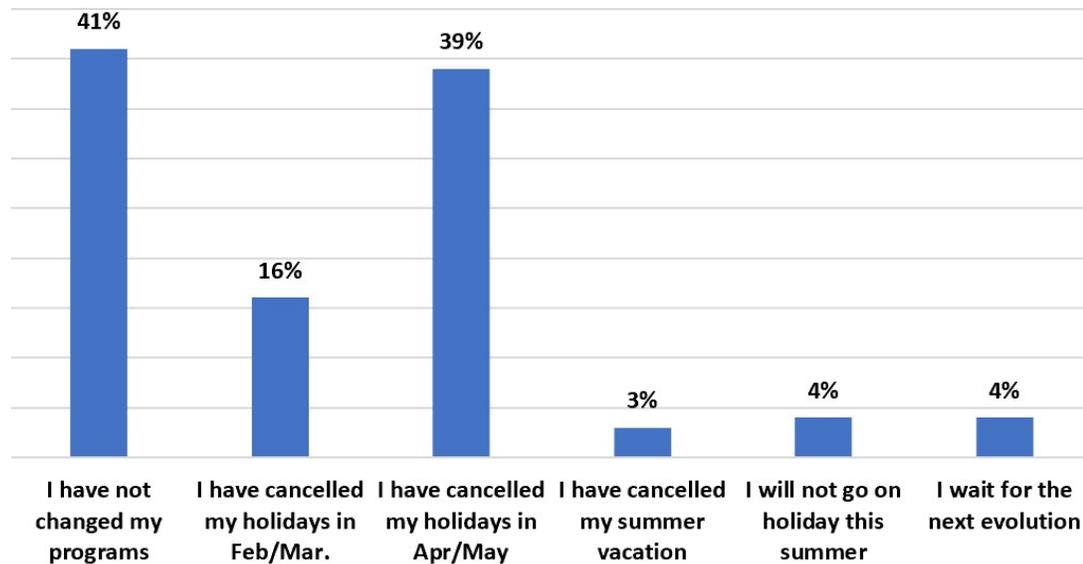
Survey – Summer 2020

- **41%** of respondents said that the health emergency did not change their holiday plans, **6%** had to cancel their holidays in February-March, **39%** cancelled their scheduled trips in April-May and **3%** summer holidays. There is no shortage of those who say they will not go on vacation (**3%**) and those who wait for the evolution (**4%**).
- However, **69%** of Italians declare their intention to go on vacation in the next 12 months and, although the share is **-14%** points compared to a similar survey carried out a year ago, there is still a strong desire to return to normality, of which holidays are an important part. The propensity to vacation increases significantly (**77%**) among those who went on holiday last year, and grows even more among those who have made an outdoor holiday in the village, camping or road trip in the last year (**80%**).
- **POSITIONING THE OUTDOOR HOLIDAY.** The open air tourism is the sector that has experienced strong growth in the last ten years and which in some ways has led a sort of cultural revolution in the collective perception of tourism itself in general.
- According to the Observatory data, almost half of the interviewees (**49%**) aspire to an outdoor holiday: **35%** are people who already stay in open-air structures and **14%** of tourists who have different types of holidays . Among the different types of open air holidays, the **village** receives the highest rating, as 58% of respondents like it, followed immediately after by the **road trip** (44%) and the **camping** (42%).
- **PROFILE OUTDOOR TOURIST.** Men are practicing outdoor tourism (**45%** of the total of men interviewed against **40%** of the total among women), included in the age group between **35 and 64 years** (53%) and fairly uniformly among the residents of the different Italian regions.
- "Our future world - global megatrends that will change the way we live") Istituto Piepoli places the outdoor tourist in the "Great" cluster expectations ", which refers to the increasingly marked desire in people to have psychologically rewarding experiences in any purchase and consumption / use of a product or service.
- **SUSTAINABLE TOURISM.** 75% favourable area for sustainable tourism, corresponding to those who say that they would certainly (17%) or likely (58%) pay more for a sustainable holiday.

Source: Tourism Observatory By Human Company in collaboration with Institute Piepoli .

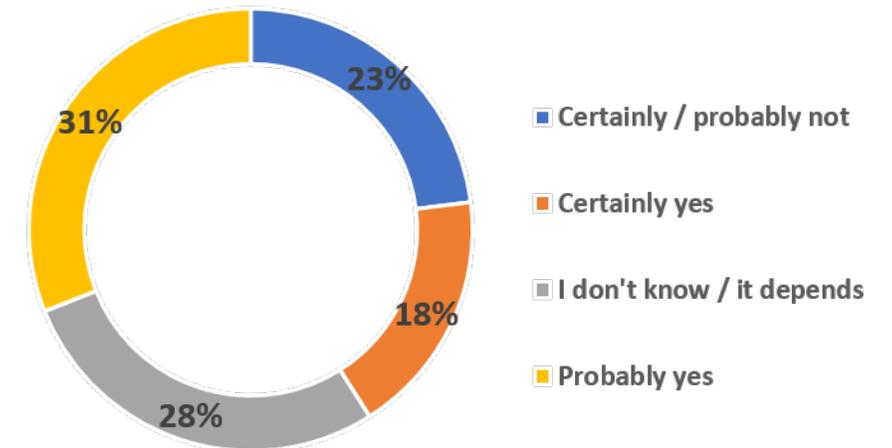
An unusual summer

Who has changed the holidays plans for Covid 19.
Multiple answer.



Source: Open, Osservatorio sul Turismo open air 2020. Total sample 2.053.

In nature Who in the coming months has thought of an alternative holiday



Short, green and on four wheels: the Italian holidays after the lockdown

- **The desire for holidays is still high.** The Italians, in fact, do not seem to want to give up their holidays:
- **48%** of the interviewees are considering a holiday between June and August (against 19% in April 2020 and against 70 percent in the same period last year).
- **Summer 2020: which holidays will they be?** Surely what has worried the Italians in recent months has not disappeared: fear and distrust will influence the choices of tourists; safety and health will remain the guiding elements of summer choices.
- **Which trends?** These include the reduction in the duration of holidays, the relaunch of a so-called proximity tourism, the choice of destinations outside the classic tourist routes in the key of a real rural revival, but also a **slower and more sustainable tourism**, in greater contact with nature and to discover and rediscover local traditions and micro-identities. Always the research of Confturismo-Confcommercio speaks for example of micro-holidays, lasting **3-4 days** and towards destinations possibly not too far from home. **35 Italians out of 100** would opt for this method, preferring places that are as open as possible and tend to be mountainous, perceived as safer and more controllable; surely the sea will not be snubbed, but a strong drop compared to the average is plausible, since the maritime destinations, between beaches, sea and evening life are more at risk of crowding. In general, however, **nature will be preferred**, to the detriment of the cities of art: only 15% of the respondents in the research of Confturismo-Confcommercio could evaluate the idea of visiting museums, exhibitions, monuments and cities of art (in 2019 they were 37%, perhaps for fear of being in closed spaces, in line, in contact with many people, and all this at the expense of the cultural tourism sector).

Source: Confturismo – Confcommercio / SWGC

Short, green and on four wheels: the Italian holidays after the lockdown

- **How will we move from our cities to vacation spots?** It is interesting to note that **holidays on wheels are preferred**, one's own vehicle (either **car** or **RVs**) in particular, but it seems that rental cars will also see an increase in requests, as well as rental of RVs. On the other hand, it is conceivable that there will be a collapse in travel by means of buses, trains and planes. The logistical choice and attention to the convenience of a trip are not aspects to be underestimated, and it is probable that the Italians will be **inclined to spend** some extras just to be more relaxed.
- **Between the destinations, only sea and mountains?** A greater attractiveness is expected for villages and internal areas, which will experience a strong revival for their typicality and culture. The search for isolation and safety, nature and the outdoors pushes us to plan trips and vacations with **greater environmental awareness**, with a renewed focus on the territories, communities and their products, in search of **experiences** and participation. And in fact the Touring Club speaks of **undertourism** or a "tourism that will privilege less known and crowded Italy, open air activities and slow tourism", in contrast with the concept of overtourism that has devastated our cities of art for years .
- **Will the tourist season be longer?** A final interesting fact is surely the hypothesis that the **tourist season may be longer**: in fact many are expected to choose to postpone their holidays in September to be more sure that the emergency has really passed, that there are no other peaks, that don't risk running into new restrictions.
- **Who will travel?** According to experts, individual or couple holidays will be privileged at the expense of groups; it will start gradually, the first to resume traveling will be the millennials (even if they have less purchasing power), then the families and finally the baby boomers couples.

Source: Confturismo – Confcommercio / SWGC

Short, green and on four wheels: the Italian holidays after the lockdown

- **Is the Italian tourism sector prepared for these changes?**
- It is all to be seen, it will be necessary to understand if the sector will be able to **reinvent** itself around the concepts of security and trust, to respond to the new needs of the tourist who places them at the peak of travel motivations, even before the price. The sector must be able to offer even greater **flexibility** in bookings (and no penalties for cancellations). Key role will be played by social networks and dedicated platforms; if before the lockdown they had already entered the tourist practices in the pre, during and post holiday phases, today they will certainly be a vehicle of information between tourists to ensure that hygiene protocols and anticovid measures are respected in the various destinations, there is attention adequate in terms of safety and there are no excessive crowds.
- Therefore the reviews will fully enter the processes of organizing a trip, going to influence both the demand of other tourists, and necessarily the offer. Furthermore, a growing propensity for the holiday is not imaginable, not only last minute, but even last second, therefore destinations must be prepared and focus on good brand communication and good territorial promotion that focuses on the new needs of the tourist and knows create trust and interest.
- More than the price to guide the purchase choices will in fact be safety, flexible policy and health reassurance and the ability to provide guarantees on four fronts: health, hygiene, reimbursement and experiential guarantees.

Source: Confturismo – Confcommercio / SWGC

Activities in the Italian market 2020

Travel Trade Italy 2020



Activities 2020

- **1** study trip for tour operators. IT (4 TO), and ES tour operators to Fjord Norway 16.-20.02.20, Go Viking concept
- **Tour operator visits** during BIT Borsa Italiana del Turismo. Tourism fair in Milan 10.-11.02.20.
- Close **dialog** with the Italian tour operators, carriers. Regular info about the situation in Norway and about Norwegian travel industry.
- **4** webinars for travel agencies in collaboration with tour operator Il Diamante, Giver Viaggi e Crociere and Gattinoni Travel Network.

Activities 2020

- Participation at **TTG**; the most important trade fair in Italy 14-16/10/2020.
- **Nordic Workshop Rome and Milan** postponed to 18-19/11/2020.
- TO – **mapping**

Webinars with tour operators – more than 900 participants

Il Diamante 11.05.2020

LARA CHINOTTI
PM SCANDINAVIA
ISLANDA
E ARTICO

LE CAPITALI SCANDINAVE
Città che guardano al futuro!

BARBARA DEMARTIN – VISIT FINLAND
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ELISABETH ONES – VISIT NORWAY
DIRETTRICE ENTE DEL TURISMO NORVEGESE



MARCO BERTOLINI – VISIT NORWAY
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Giver Viaggi e Crociere 15.05. and 04.06

**NORVEGIA DEL NORD
E AURORA BOREALE**
Un webinar per scoprire le meraviglie
invernali del Grande Nord con:

- Andrea Carraro, Giver Viaggi e Crociere
- Marco Bertolini, Visit Norway

GIOVEDÌ 4 GIUGNO @ 11:00
CLICCA E REGISTRATI AL WEBINAR

Gattinoni 09.06.20

NORVEGIA
15 MIN CON L'ESPERTO

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