

Innovation Norway France Travel Trade insights

- Webinar France, 2020, 9th of June at 9:30

Agenda

**1 – General situation in France
COVID**

**2 – The tourism sector in France:
impact, feedback & advices**

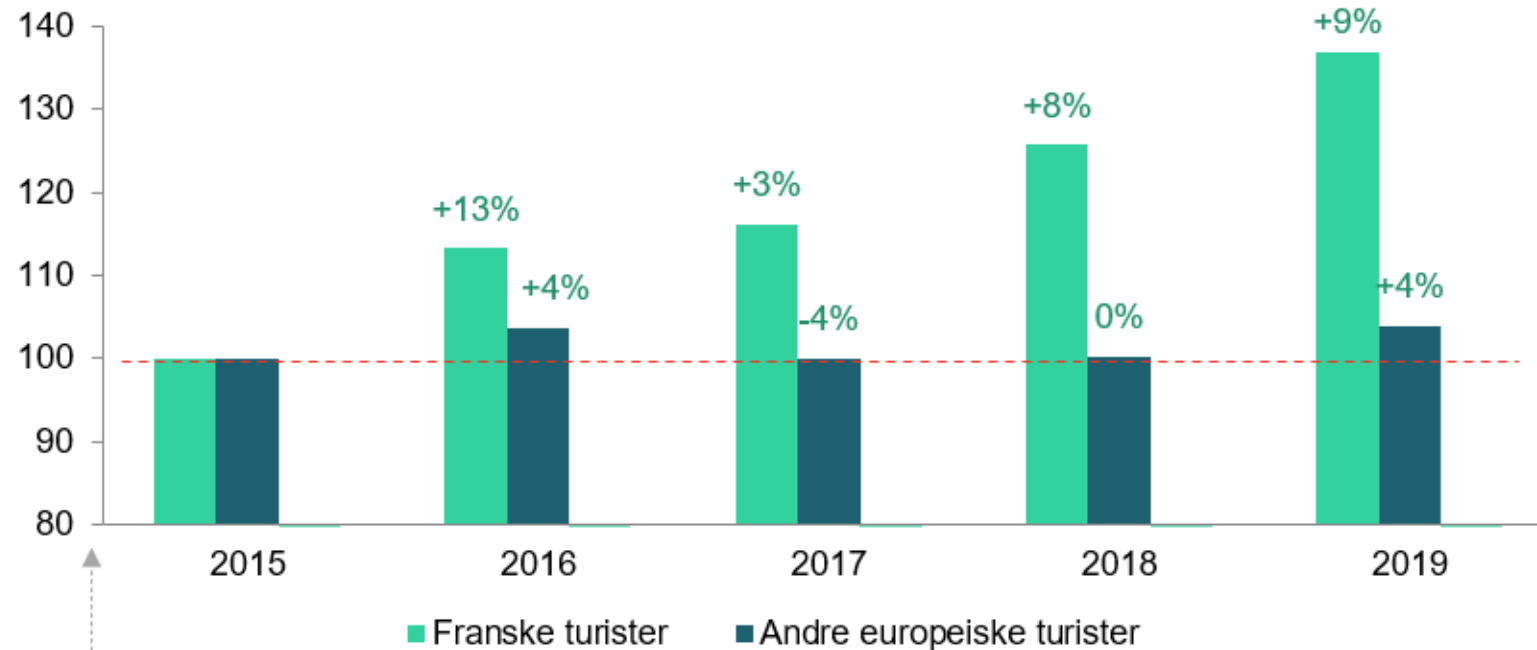
3 – Activities for 2020

4 – Questions & Answers

1 – General situation in France COVID

Before the crisis

Utviklingen av de franske turistenes kommersielle overnattingsdøgn



tistikk

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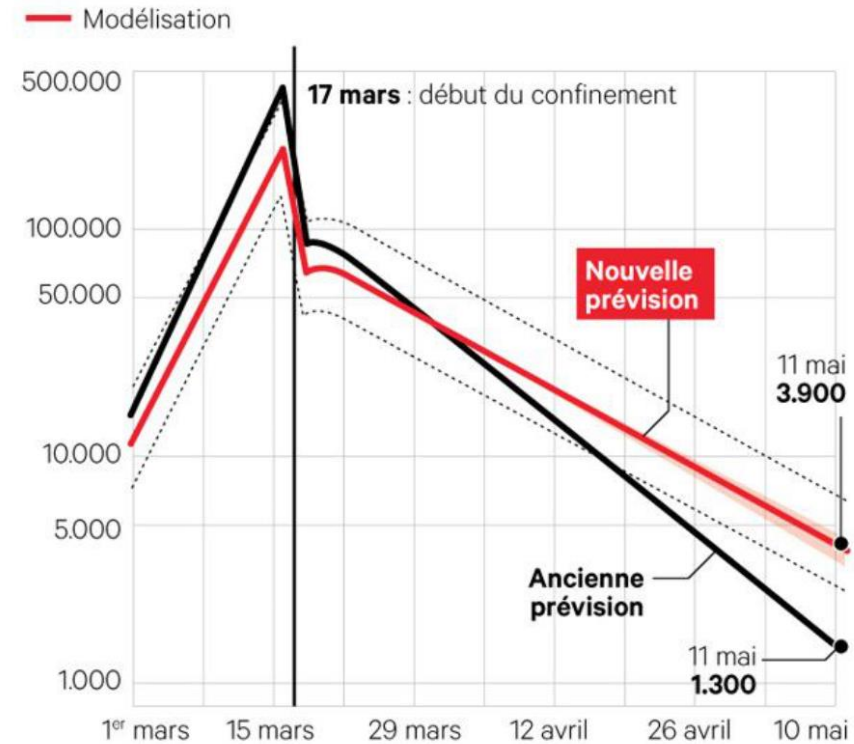
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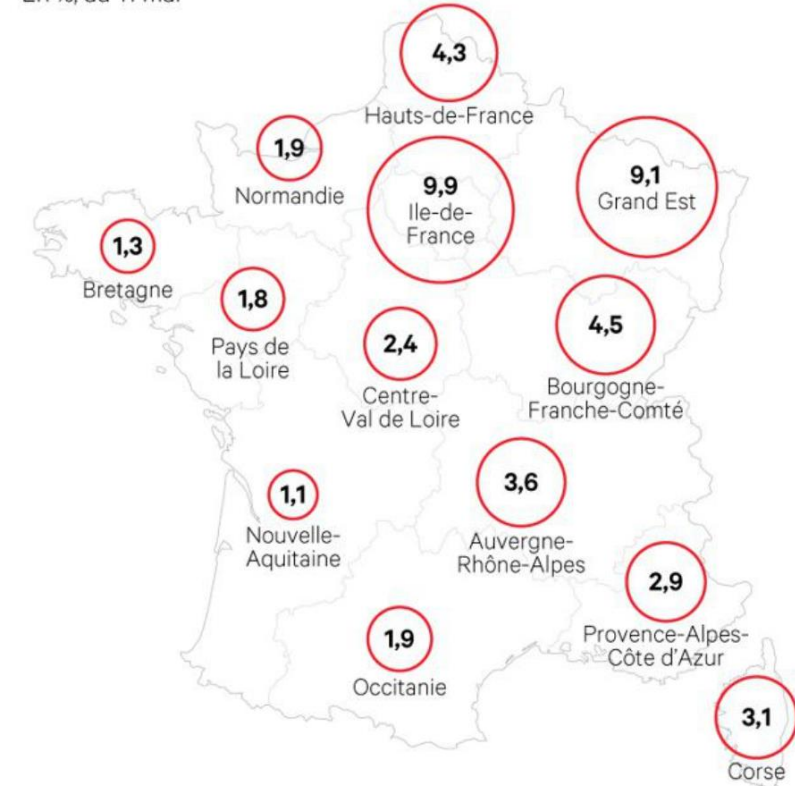
Contaminations quotidiennes en France

En nombre, échelle logarithmique



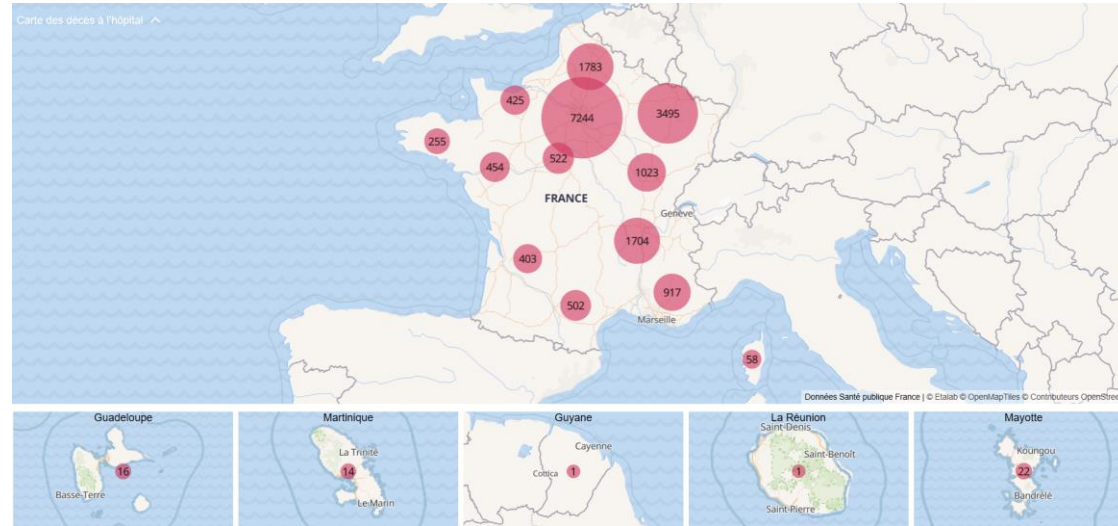
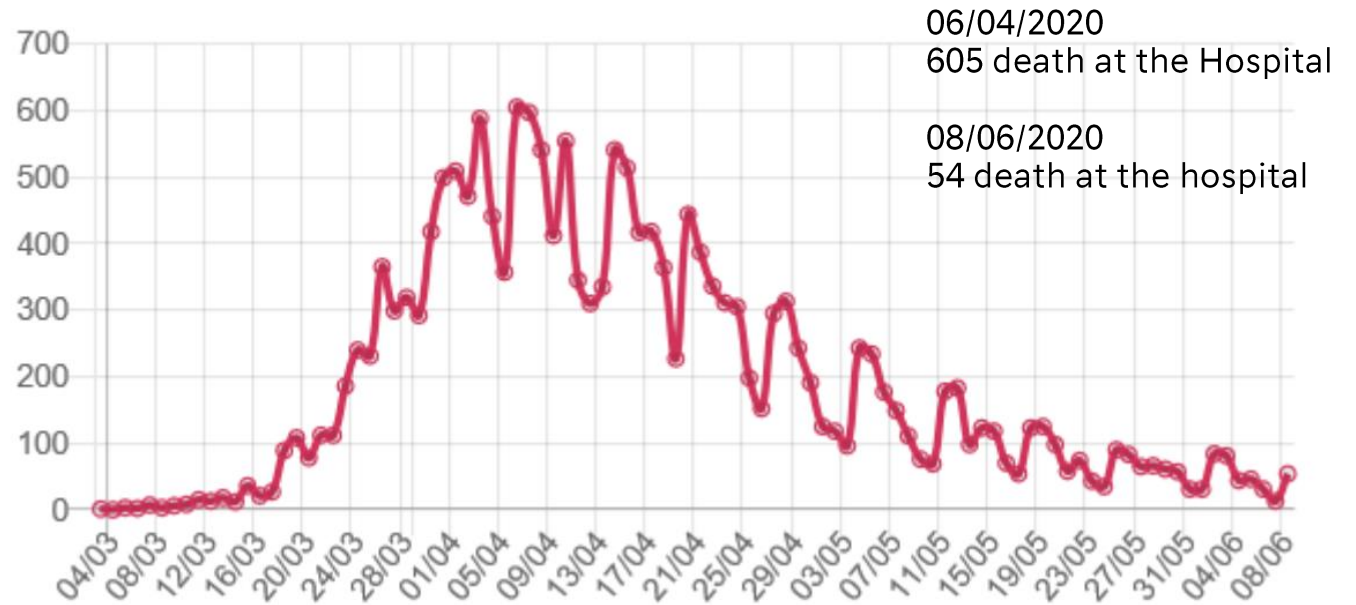
La population contaminée par région

En %, au 11 mai



« LES ÉCHOS » / SOURCE : INSTITUT PASTEUR

Data 8th June 2020



So the crisis (1/2)

Stay home & take care

Lockdown measures – 17th March to 11th May - from 1km 1hour to 100km unlimited time

17th March to 11st May - Total lockdown

16th March the President announced the lockdown in France

- We had to choose the day after at noon where we wanted to stay during the lockdown.
- Kindergarten, primary school, middle schools (collèges), high schools (lycées) and universities have been closed as restaurants, bars, cultural institutions etc... and “all businesses not essential to the life of the nation” said Macron.
- Full lockdown – 1 hour 1 km – A declaration had to be completed every time you went out – punishable by a fine (135 EUR).
- Every evening at 20:00, France applauds its medical staff ...
- Work at home
- Partial unemployment (17th April / 9M)
- 13th April the President announced that the lockdown will continue until May, 11th.
- Soon, a specific plan will be implemented for sectors that, such as tourism, hotels, restaurants, culture and events, will be permanently affected.
- Charge cancellations and specific helps will be put in place.
- And schools and businesses will reopen...
- 28th April Speech of the Prime Minister Edouard Philippe to clarify all the new measures
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Tourism: impacts on the French travel sector: Report dated 22nd April: Visit Norway Innsikt (in Norwegian)

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Stay aware & take care

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11th May to 2nd June – Red zones versus green zones – Travelling is not allowed over 100km from your home unless imperative reasons <https://www.gouvernement.fr/en/coronavirus-covid-19> - Since May 11th, lockdown measures are gradually being relaxed.

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- Working from home must be preferred whenever possible.
- Schools reopen gradually.
- Most shops (also hairdresser), outdoor activities, libraries, small museums etc...
- No more than 10 people may gather in any one place at present.
- Gatherings of more than 5,000 people will not be authorised before August 31st at the earliest.

The lockdown is still here.

The Prime Minister announced May, 14th that French people will be allowed to go on holiday in France in July and August ☺

At the same time E. Philippe announced a #PlanTourisme of 18 billions euros
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Edouard Philippe ✓
@EPhilippePM



Le tourisme fait face à la pire épreuve de son histoire moderne. Son sauvetage est une priorité nationale : pour permettre au secteur de surmonter la crise, nous mettons en place un [#PlanTourisme](#) sans précédent de 18 milliards d'euros.

#PLANTOURISME

Le tourisme en France

- 2 millions d'emplois directs et indirects
- 8% du PIB
- Numéro 1 mondial
(90 millions de touristes étrangers en 2019)



And now!

Protect, test, isolate

Lockdown Phase II
Still 3 départements are orange vs green zones
2nd June to 22nd June
From 2nd June unlimited km & time we are free!

- Transport
- Bars & restaurants (just terraces in the orange zone)
- Schools (just 10 to 15 pupils by classroom but since the 11th May: on 50 500 schools (1 M pupils) in FR around 80-85% are opened) Presence is not mandatory
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Lockdown Phase III
From the 22nd June (perspectives)
Everything should be open and the orange zones should become green zones

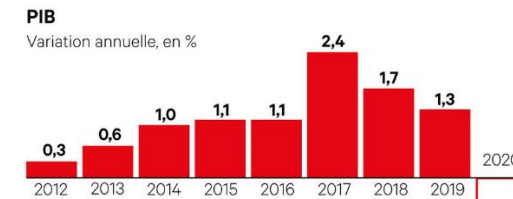
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Calendar:

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Graphics GDP (status 20/05)
GDP – 8%
but at -11% now

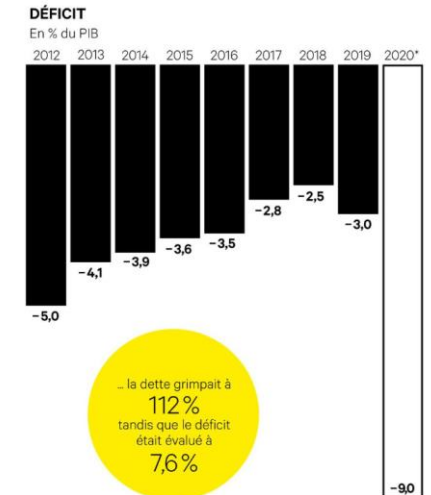
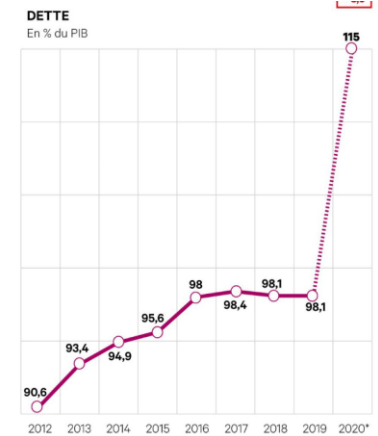
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*PRÉVISIONS DU GOUVERNEMENT *LES ÉCHOS / SOURCES : INSEE, BERCY

Economical and moral consequences

Economic Crisis

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Forecasts announced 8% GDP deficit. It is now 11% GDP deficit

Unemployment rate: end 2019 8,1% to more than 10%

- State-guaranteed loans are huge - French banks have granted 93 billion euros in government-guaranteed loans to 490,000 companies
- Unprecedented plan to save the economy

Moral Crisis

Eight weeks of total lockdown.

The chock has been brutal. «Restez chez vous» Stay at Home

Confinement = precariousness, disease, economic crisis, death, separation from family & friends, loneliness, stress work & kids at home ...

VERSUS for others it encourages introspection, a well-deserved break, a new quality of life and a way to do new things at home like cooking, reading, doing yoga ... Everything that was futile in life is gone.

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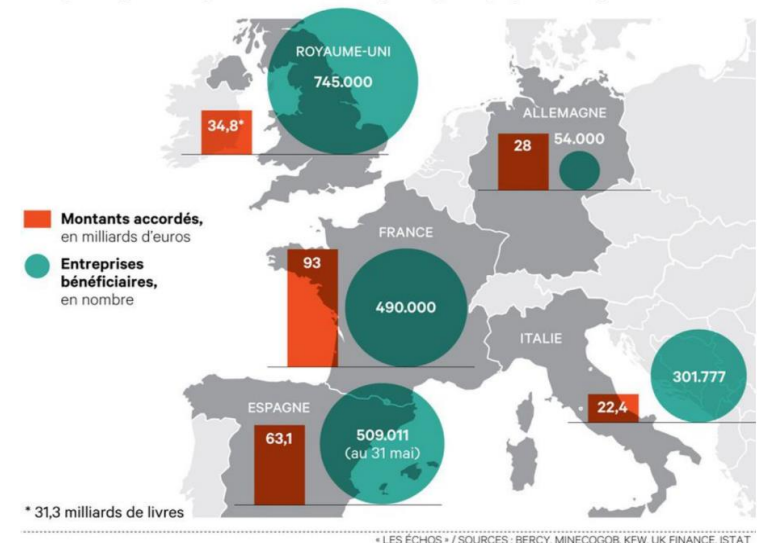
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Live in the countryside / return to nature / Eat local food / Buy local and less / Take time / flexibility / better quality of life / short circuit consumption / the do it yourself

Emphasize and progress of trends with the confinement. (ex: 8 on 10 executive workers ready to leave Paris) e-life / focus of the essential / rationalization consumption / desires for collectivity / health / relationship to work

Les prêts garantis par l'Etat dans les principaux pays d'Europe



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<https://www.ifop.com/publication/le-confinement-laboratoire-du-consommateur-de-demain/>

https://www.huffingtonpost.fr/entry/apres-le-coronavirus-notre-societe-va-changer-et-confirmer-ces-6-tendances_fr_5e7254c6c5b6f5b7c53cd8d5?utm_hp_ref=fr-homepage

2 – What about the travel sector?

Feedback & advices

Situation in the tourism sector in France

- **Summer holidays in France**
 - Emotional and economical reasons
 - Smaller budgets
 - National campaigns
 - Toward longer seasons ?
- **Border situation and quarantaine rules**
- **Transportation**
 - Train to restart fully mid-June
 - Wish to reopen Orly airport on 26th June
 - [Flight transport slowly starting up again](#)



Impact on travel demand

- Emotional and economical effects
- Toward more social and environmental commitments in the industry

Interest for Norway

Need after confinement

- Being surrounded by nature again
- Less crowded places
- More sustainable tourism
- Avoiding trips in big groups

Searches

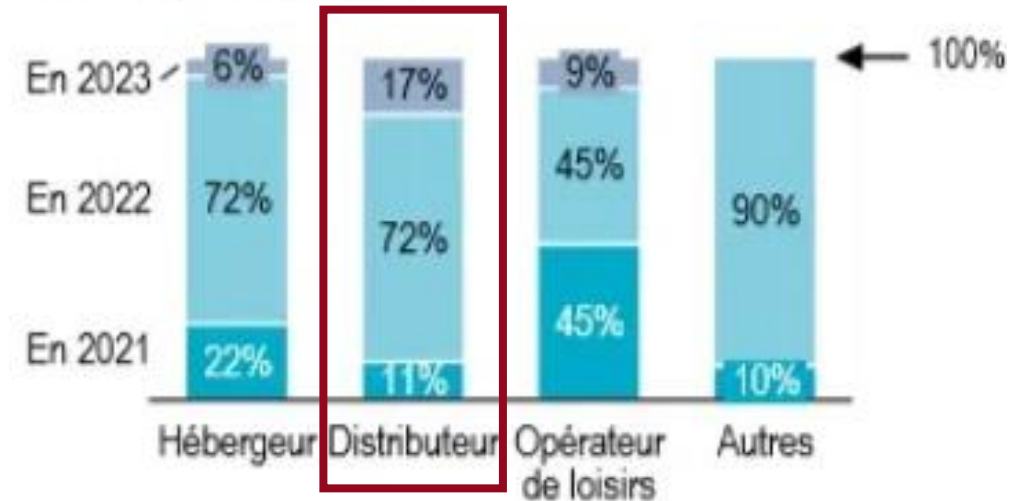
- High but 91 plus days ahead or without any dates (Expedia)



Generic Impact on B2B' - some key numbers

- International travels [represent 83% of French TO's income](#)
- **Loss of 85% activity** between [April and December 2020](#) [according to SETO](#)
- [Signs of improvements](#) signaled from Travel agencies and some [hopes for Autumn-Winter 2020](#)
- Expect to be back at initial turnover level from before crisis in 2022-2023

Détail par secteur



Back to before crisis's turnover – [source Roland Berger barometer](#)

Impact on travel agencies – survey from May 8th



70%

des sociétés sondées ont demandé un report de leurs échéances fiscales et/ou sociales. C'est la solution privilégiée par les entreprises du tourisme.

50%

C'est la proportion d'entreprises interrogées ayant sollicité un prêt garanti par l'État (PGE). Plus de la moitié d'entre elles l'ont obtenu.



43%

des répondants ont fait appel au fonds de solidarité. Les modalités d'accès à ce fonds ont d'ailleurs été élargi afin d'en faire bénéficier les entreprises sans salarié.

24,4%

C'est le temps de travail moyen des salariés des entreprises interrogées. Il était de 40% début avril.

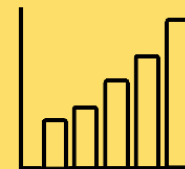


69%

C'est la part des entreprises interrogées dont le temps de travail est inférieur à 20%.

73%

des sociétés sondées indiquent utiliser les avoirs autorisés par l'ordonnance sur les voyages à forfait systématiquement.



83%


des répondantes déclarent avoir enregistré une activité nulle au mois d'avril 2020.

40%

des entreprises prévoient une activité nulle pour les mois de juillet, août et septembre 2020. Ce sera le cas par exemple des agences spécialistes des voyages scolaires.



© Tour Hebdo, avec Canva – Source :

 <https://www.tourheβδο.com/actualites/economie/infographie-coronavirus-la-situation-des-entreprises-du-tourisme-a-fin-avril-551894.php>

Feedback from TOs and future bookings

- **Company situation :**
 - partial unemployment
 - managing bookings
 - planning 2021
- **Booking situation :**
 - Reports and vouchers
 - Groups – individuals
 - Challenge to keep the same prices
- **What outlook ?**
 - Summer in France
 - Autumn & Winter : some hopes
 - Main focus on 2021 - potential
 - 'Uncertainty about Flights

Recommendations

- Communicate on pricing 2021 / new products
- What sustainability choices have you made ?

Interface Tourism Report :

“Three conditions for recovery:
administrative, technical, **psychological**”

- Be safe / Reassure on safety measures and cancellation policy
- Be welcomed / What do you do in terms of hospitality and human relations ?



(15th May) TRUST IS THE NEW CURRENCY

Zurab Pololikashvili UNWTO Secretary-General

The latest data shows 100% of all destinations have restrictions in place. Depending on when and where travel restrictions are lifted, international tourist numbers could fall between 60 and 80% this year.

The lifting of travel restrictions, first within nations and then across international borders, will allow the many social and economic benefits tourism brings to return not just in Europe but around the world.

The EU plan, which owes much to the work of Commissioner Breton, is an example for the rest of the world to follow.

The coordinated rolling out of new health and safety protocols for every part of the tourism value chain – including travel, accommodation, food and leisure – will make it safer to travel.

Trust is the new currency of our ‘new normal’. And tourism is ideally positioned to be the vehicle to channel trust.

If people trust in governments and in the tourism sector to keep them safe from harm, they will indeed travel tomorrow.

Sources <https://www.unwto.org/news/covid-19-may-statement-unwto-secretary-general>

3 – VN B2B Activities 2020

- **B2B webinar Go Nordics**

End of June (possible dates 23-25): first webinar

Theme: Corona status + Autumn

Day 1 – Corona status all together (15 min max) + 2 countries Autumn & Day 2 – 3 countries Autumn

September – October : second and third webinar

- **Digital NTW** 8 & 9 September

- **Digital Workshop** "[Alternatives routes & new season](#)" in October (13.-15. oct. date to be decided) – the Norwegian suppliers meet French product managers - Teams room by theme or regions.

- **Travel Trade Fair** [IFTM Top Resa](#) postponed to midt – end of November (more info next week) –VN presence to be evaluated – without partners – just VN on behalf of the industry

- **Newsletter: news from Norway** sent regularly to TO's – A new template is on preparation.

- **Next webinar Travel Trade Insights for France the 16th of June** at 9:30 on Whereby

- Stay informed about the B2B activities on this link <https://business.visitnorway.com/en/b2b-activities/>

4 – Questions & Answers

Ta gjerne kontakt med oss 😊



Léa Pinsard
Tourism Consultant
lea.pinsard@innovationnorway.no



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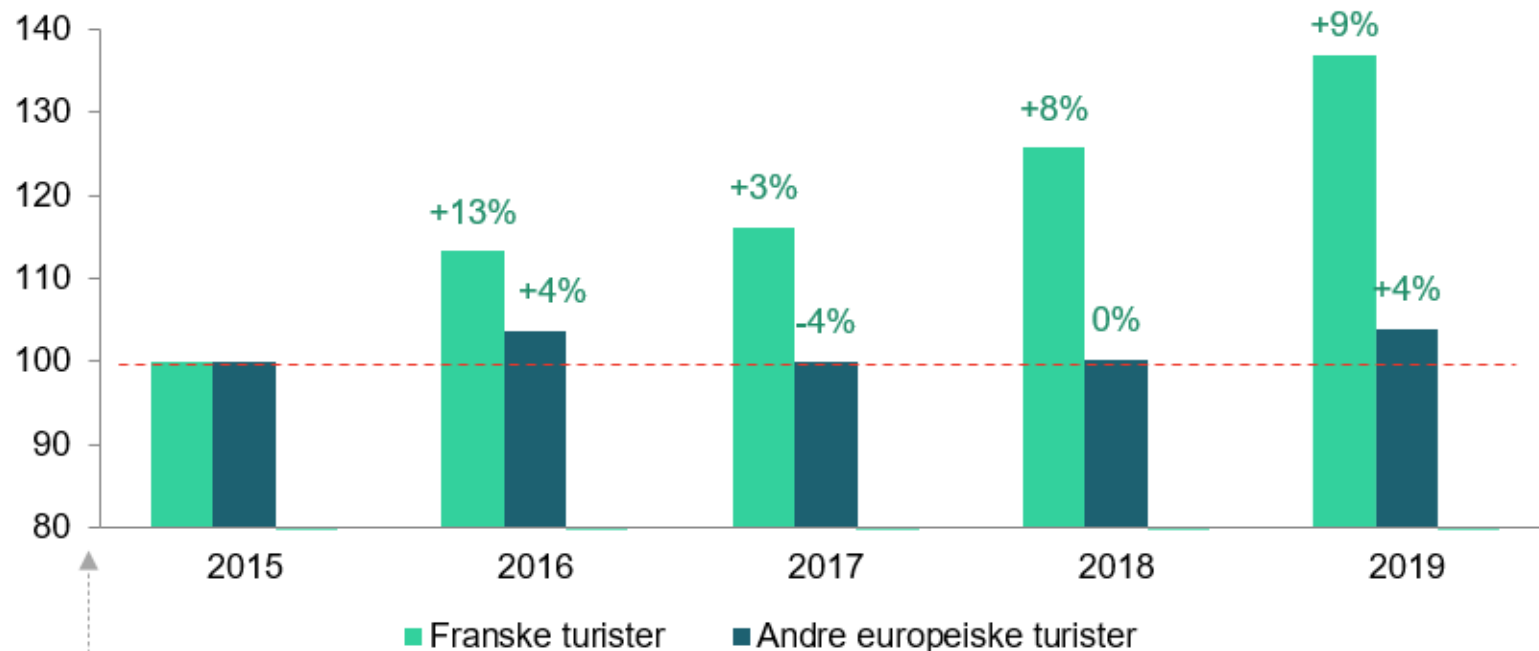
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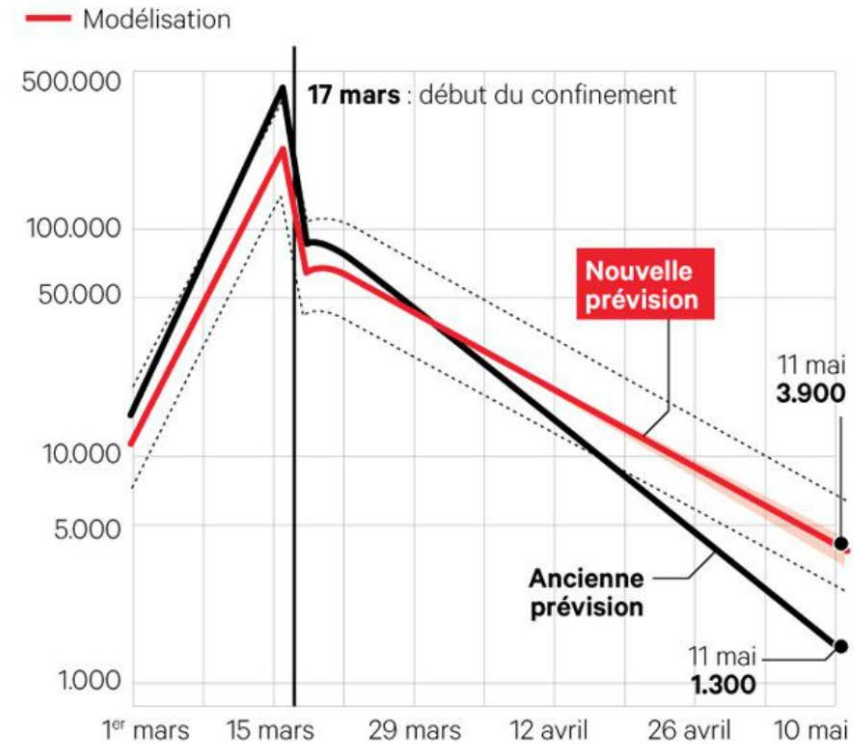
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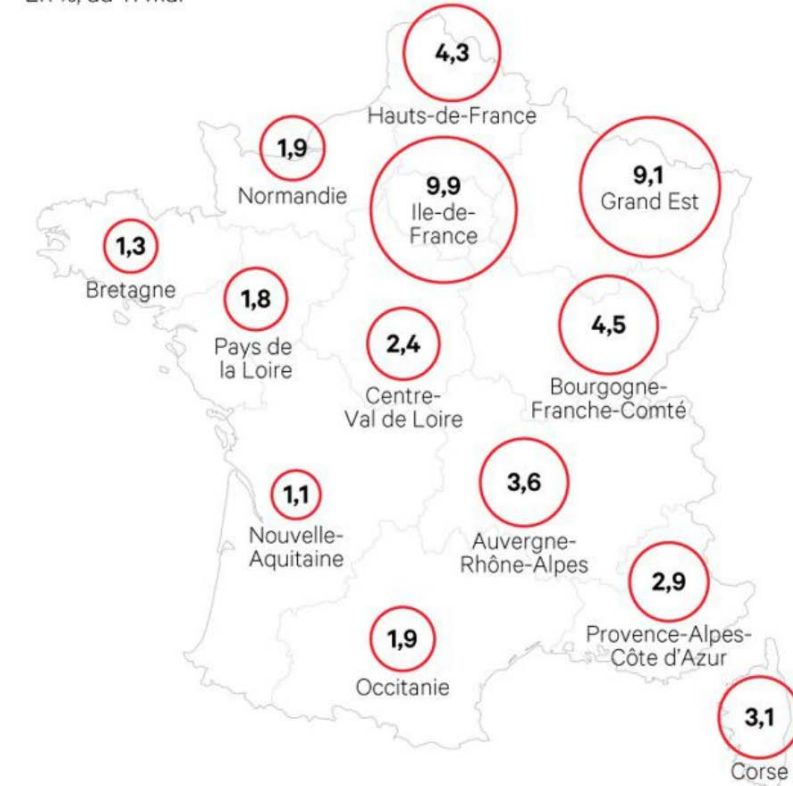
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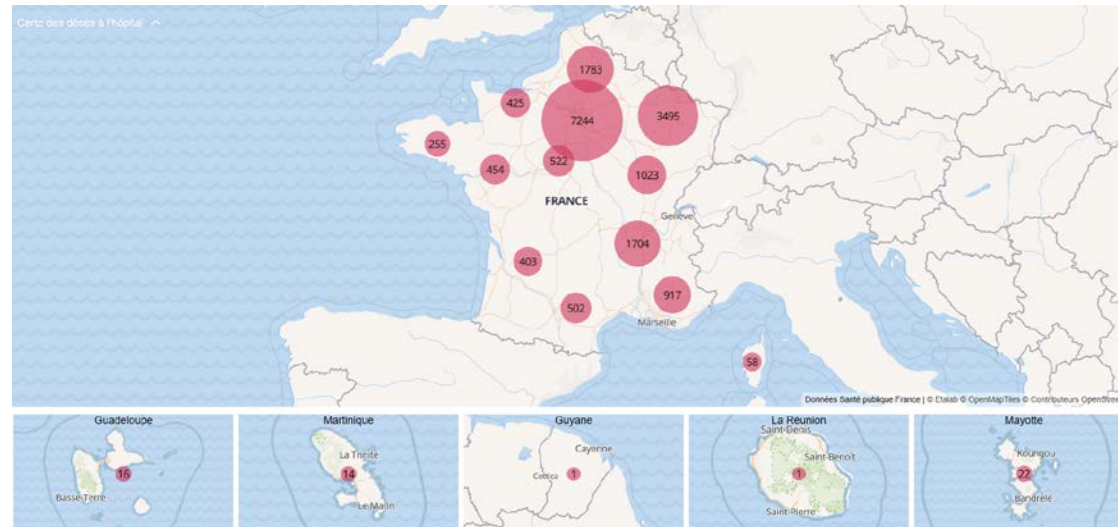
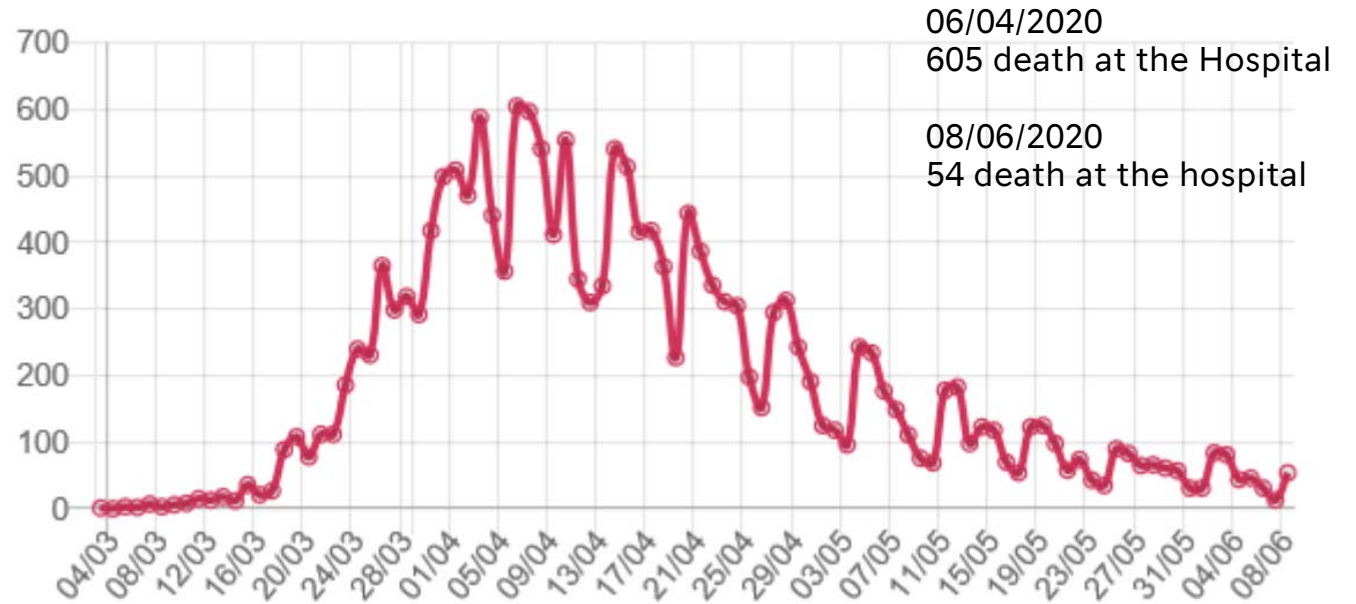
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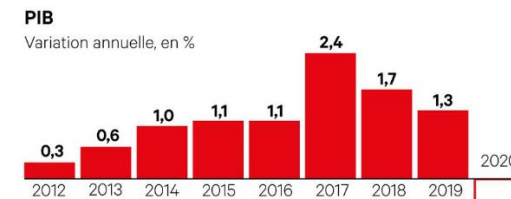
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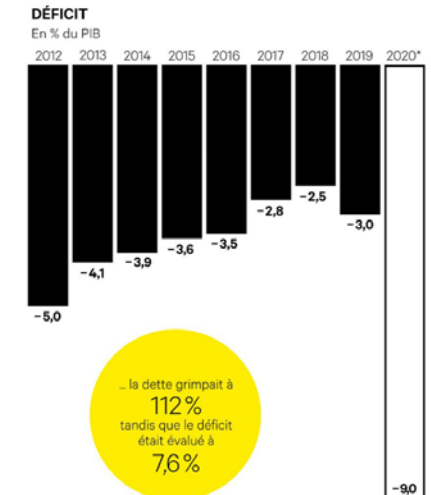
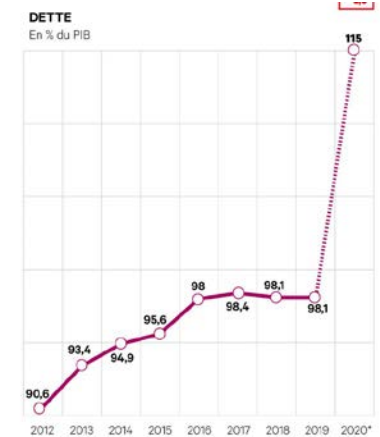
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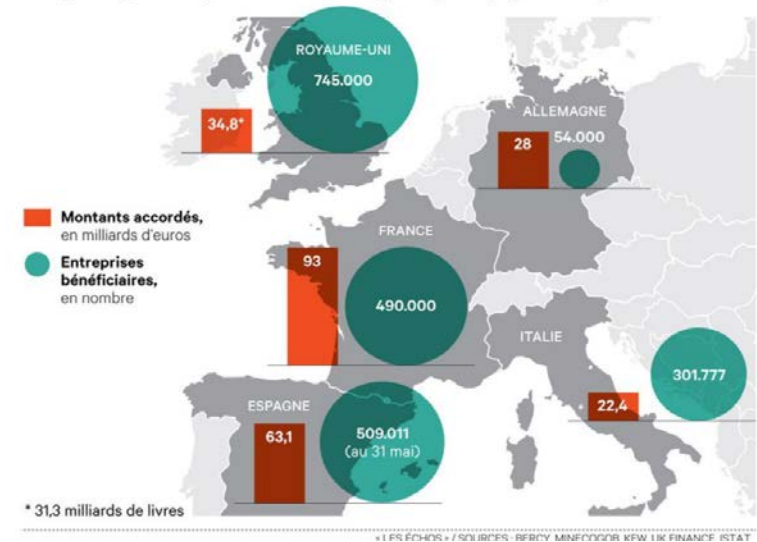
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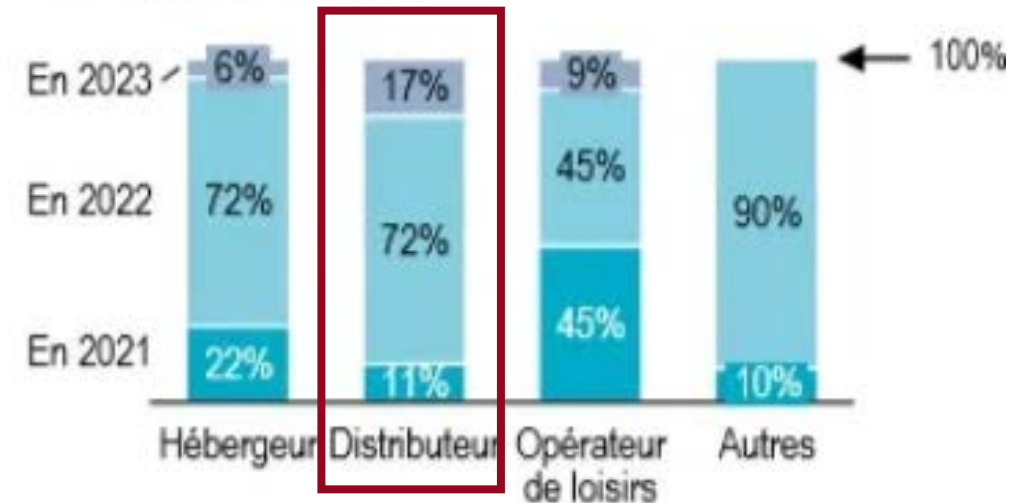
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Generic Impact on B2B' - some key numbers

- International travels [represent 83% of French TO's income](#)
- **Loss of 85% activity** between [April and December 2020](#) [according to SETO](#)
- [Signs of improvements](#) signaled from Travel agencies and some [hopes for Autumn-Winter 2020](#)
- Expect to be back at initial turnover level from before crisis in 2022-2023

Détail par secteur



Back to before crisis's turnover – [source Roland Berger barometer](#)

Impact on travel agencies – survey from May 8th



70%

des sociétés sondées ont demandé un report de leurs échéances fiscales et/ou sociales. C'est la solution privilégiée par les entreprises du tourisme.

50%

C'est la proportion d'entreprises interrogées ayant sollicité un prêt garanti par l'État (PGE). Plus de la moitié d'entre elles l'ont obtenu.



43%

des répondants ont fait appel au fonds de solidarité. Les modalités d'accès à ce fonds ont d'ailleurs été élargi afin d'en faire bénéficier les entreprises sans salarié.

24,4%

C'est le temps de travail moyen des salariés des entreprises interrogées. Il était de 40% début avril.

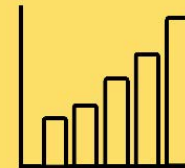


69%

C'est la part des entreprises interrogées dont le temps de travail est inférieur à 20%.

73%

des sociétés sondées indiquent utiliser les avoirs autorisés par l'ordonnance sur les voyages à forfait systématiquement.



83%


des répondantes déclarent avoir enregistré une activité nulle au mois d'avril 2020.

40%

des entreprises prévoient une activité nulle pour les mois de juillet, août et septembre 2020. Ce sera le cas par exemple des agences spécialistes des voyages scolaires.



© Tour Hebdo, avec Canva – Source :

 <https://www.tourheβδο.com/actualites/economie/infographie-coronavirus-la-situation-des-entreprises-du-tourisme-a-fin-avril-551894.php>



Feedback from TOs and future bookings

- **Company situation :**
 - partial unemployment
 - managing bookings
 - planning 2021
- **Booking situation :**
 - Reports and vouchers
 - Groups – individuals
 - Challenge to keep the same prices
- **What outlook ?**
 - Summer in France
 - Autumn & Winter : some hopes
 - Main focus on 2021 - potential
 - 'Uncertainty about Flights

Recommendations

- Communicate on pricing 2021 / new products
- What sustainability choices have you made ?

Interface Tourism Report :

“Three conditions for recovery:
administrative, technical, **psychological**”

- Be safe / Reassure on safety measures and cancellation policy
- Be welcomed / What do you do in terms of hospitality and human relations ?



(15th May) TRUST IS THE NEW CURRENCY

Zurab Pololikashvili UNWTO Secretary-General

The latest data shows 100% of all destinations have restrictions in place. Depending on when and where travel restrictions are lifted, international tourist numbers could fall between 60 and 80% this year.

The lifting of travel restrictions, first within nations and then across international borders, will allow the many social and economic benefits tourism brings to return not just in Europe but around the world.

The EU plan, which owes much to the work of Commissioner Breton, is an example for the rest of the world to follow.

The coordinated rolling out of new health and safety protocols for every part of the tourism value chain – including travel, accommodation, food and leisure – will make it safer to travel.

Trust is the new currency of our ‘new normal’. And tourism is ideally positioned to be the vehicle to channel trust.

If people trust in governments and in the tourism sector to keep them safe from harm, they will indeed travel tomorrow.

Sources <https://www.unwto.org/news/covid-19-may-statement-unwto-secretary-general>

3 – VN B2B Activities 2020

- **B2B webinar Go Nordics**

End of June (possible dates 23-25): first webinar

Theme: Corona status + Autumn

Day 1 – Corona status all together (15 min max) + 2 countries Autumn & Day 2 – 3 countries Autumn

September – October : second and third webinar

- **Digital NTW** 8 & 9 September

- **Digital Workshop** "[Alternatives routes & new season](#)" in October (13.-15. oct. date to be decided) – the Norwegian suppliers meet French product managers - Teams room by theme or regions.

- **Travel Trade Fair** [IFTM Top Resa](#) postponed to midt – end of November (more info next week) –VN presence to be evaluated – without partners – just VN on behalf of the industry

- **Newsletter: news from Norway** sent regularly to TO's – A new template is on preparation.

- **Next webinar Travel Trade Insights for France the 16th of June** at 9:30 on Whereby

- Stay informed about the B2B activities on this link <https://business.visitnorway.com/en/b2b-activities/>

4 – Questions & Answers

Ta gjerne kontakt med oss 😊



Léa Pinsard
Tourism Consultant
lea.pinsard@innovationnorway.no



Delphine Vallon
Tourism Consultant
delphine.vallon@innovationnorway.no

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.

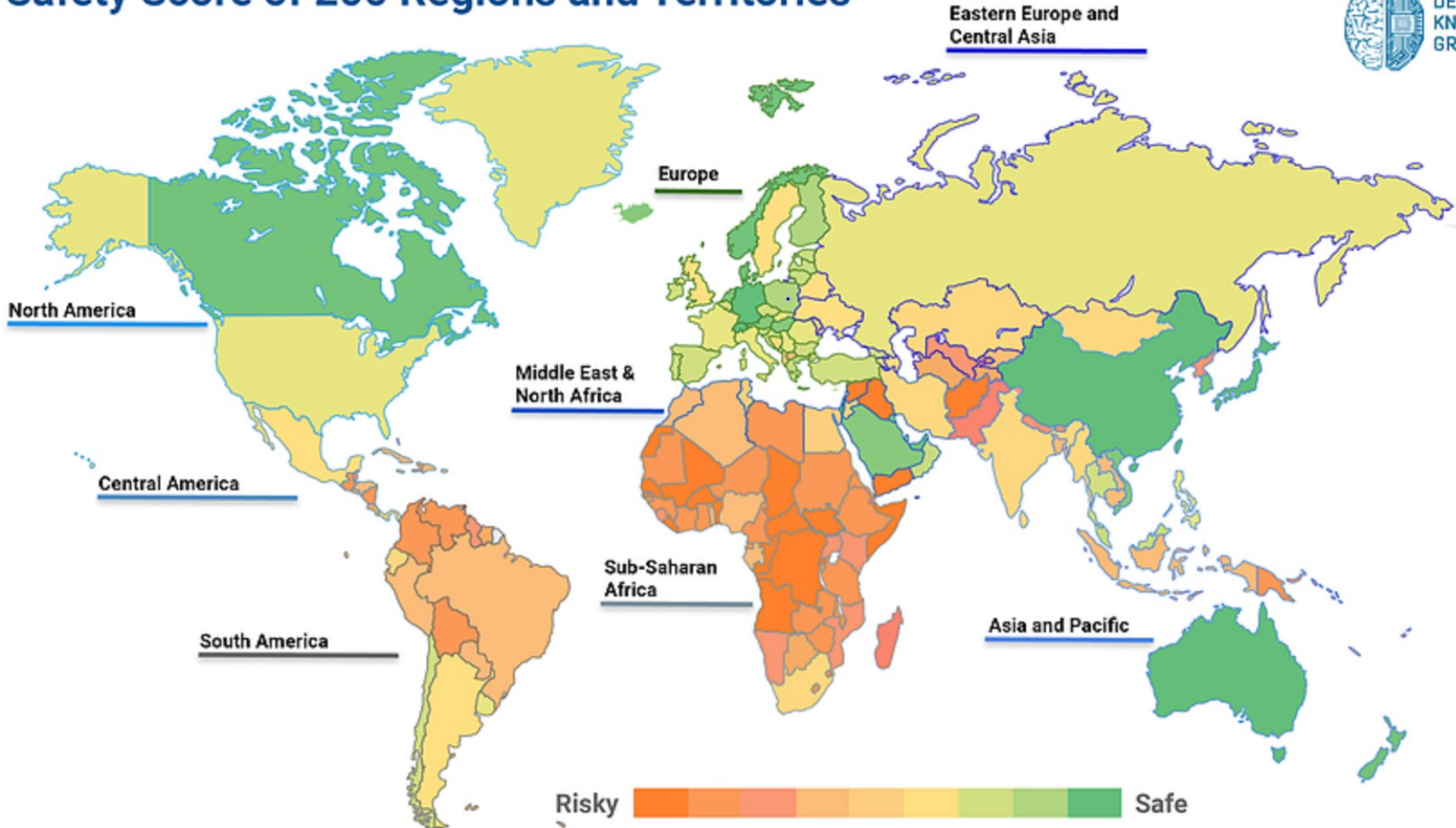
Starting to open the borders...

- 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.

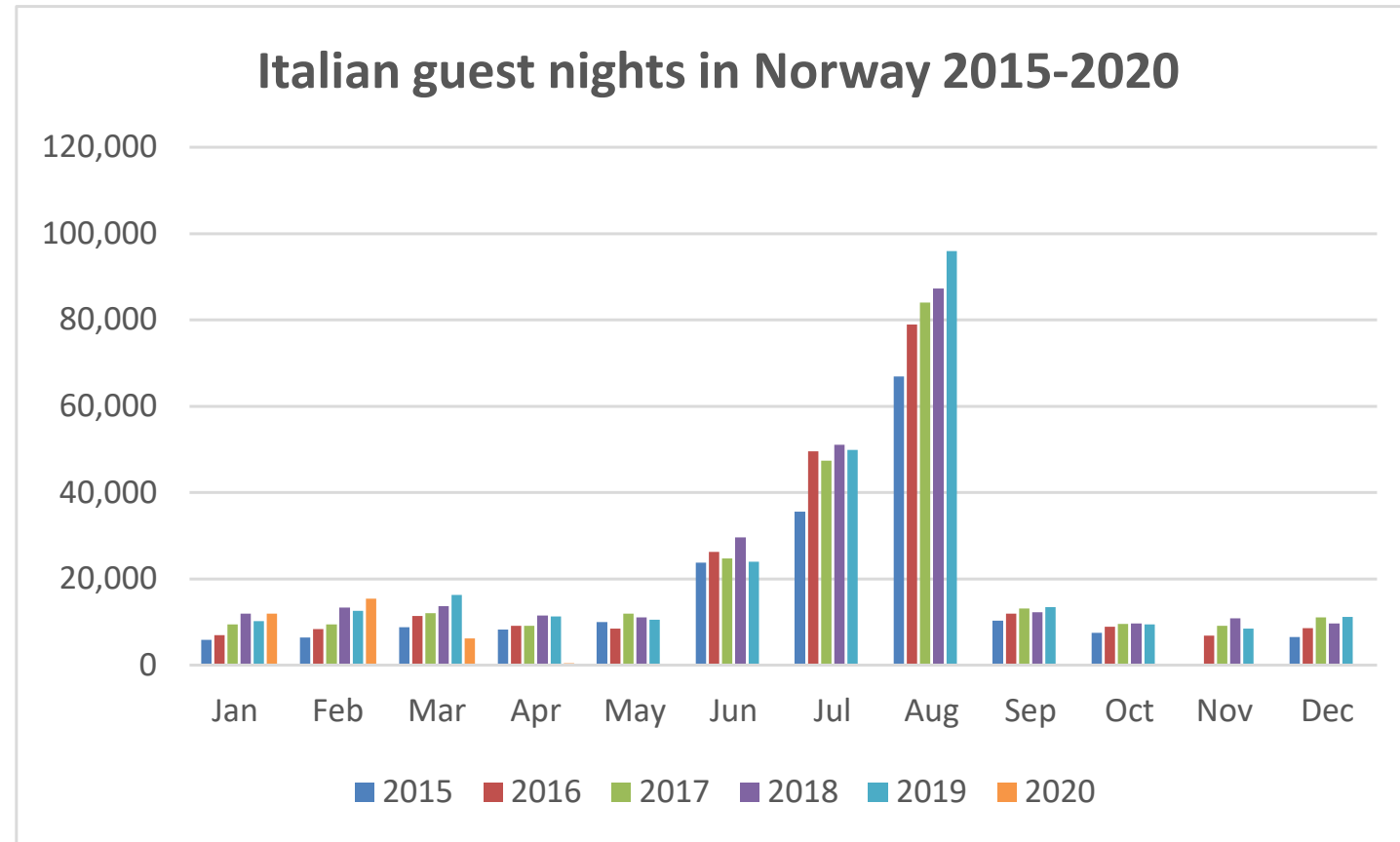
News from the market after the virus (Norway)

- 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 .

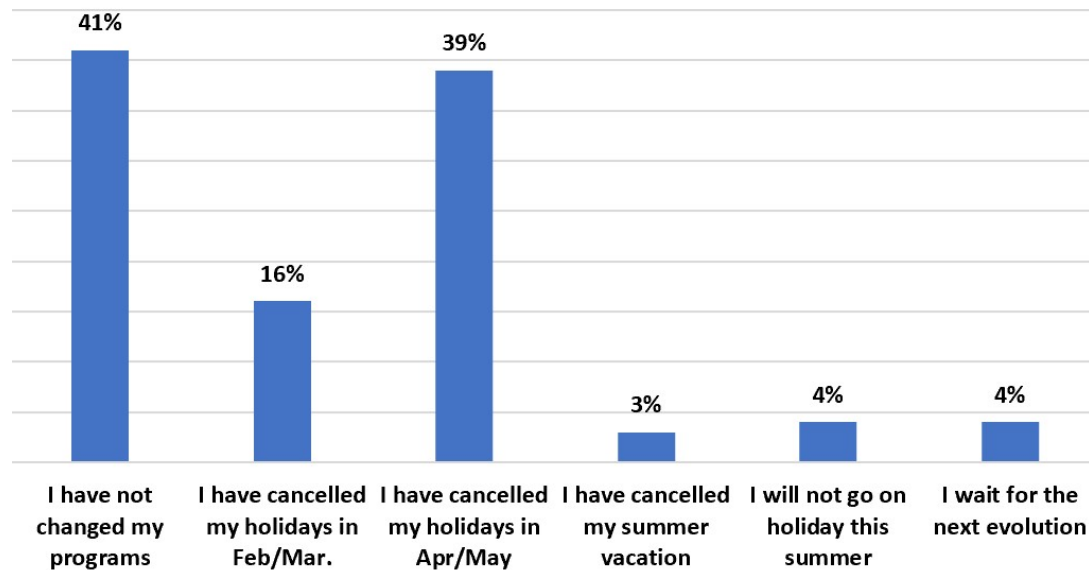
Survey – Summer 2020

- **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 .

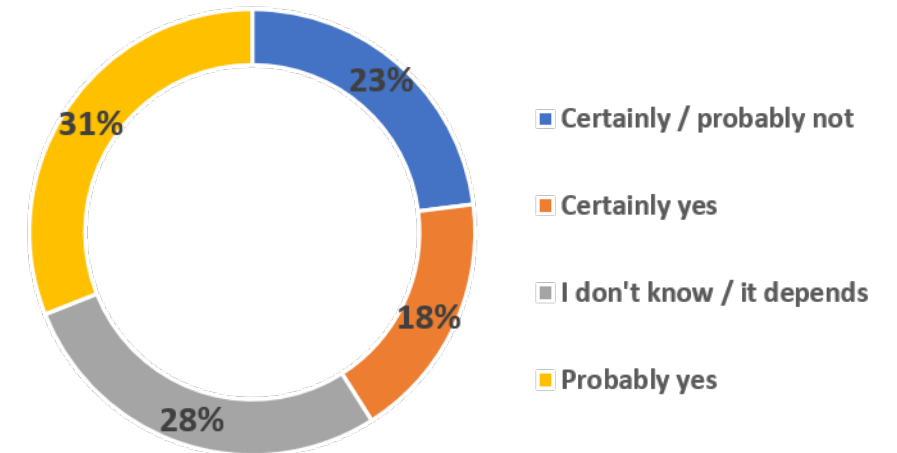
An unusual summer

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
RESPONSIBILE TRADE



ELISABETH ONES – VISIT NORWAY
DIRETTRICE ENTE DEL TURISMO NORVEGESE



MARCO BERTOLINI – VISIT NORWAY
RESPONSIBILE TRADE



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

NORWAY POWERED BY NATURE
GIVER VIAGGI E CROCIERE

Gattinoni 09.06.20

NORVEGIA
15 MIN CON L'ESPERTO

GATTINONI
MY NETWORK
NORWAY POWERED BY NATURE

Contact us:

- Marco Bertolini
Industry Specialist Italy
E-mail: marco.bertolini@innovationnorway.no
- Elisabeth Ones
Market Specialist Italy
E-mail: elisabeth.ones@innovationnorway.no



Rusland

Status og aktiviteter
Webinar 08.06.2020

Olga Philippenko
Markeds- og bransjespesialist Rusland
Olga.Philippenko@innovationnorway.no

AGENDA

- Russland: Hva skjedde på markedet – før Covid-19?
- Turoperatører å merke seg - Status før COVID 19
- Prognoser etter pademien, reiseplaner etter lettelse av restriksjoner
- Tilbakemeldninger fra russiske turoperatører
- Grensen situasjon & reiseråd
- Økonomisk situasjon i Russland
- B2B activities in Russia


Russland: Hva skjedde på markedet – før Covid-19?

- ✓ Økonomien gikk bedre og det var en økning i antall russiske gjester.
- ✓ Grunnen var i stabil valutakurs (EUR/RUB)
- ✓ Flere russiske turister reiste til utlandet de siste årene tross sanksjoner:
 - for 2019 – var det 45,3 mln. turister fra Russland, **økning med 8%** i forhold til 2018.
 - for 2019 **økte** antall russiske gjestedøgn i Norge **med 15 %** og utgjorde 154.189 overnattinger.
 - De 2 første månedene var det økning fra Russland til Norge med 19 prosent vekst.
- ✓ Vi forventet en økning til Norge på 15% -20% i 2020.

Nøkkeltall 2020 før COVID-19:

- BNP: 1,3 %
- Arbeidsløshet: 4,6 %
- Overnattinger: 154.189 +15%
- Overnattinger hiå:
- Operatører som selger Norge: 87
- Antall operatører på NTW: 21 (27 deltager)

Russland: Hva skjedde på markedet – før Covid-19?

- ✓ Stabilitet på reiselivsmarkedet
 - ✓ Russiske turister velger: kortere opphold, spare på tilleggstenester, turpakker blir mer tiltrekkende igjen.
 - ✓ Flesteparten av turister kommer fra Moskva og St.Petersburg på grunn av gode transportforbindelser og høyere levestandard.
 - ✓ Russere blir også stadig mer interessert i aktiv ferie.
 - ✓ Den mest attraktive destinasjonen er Fjord Norge som tiltrekker de fleste russiske turister.
 - ✓ Havfiske er populært blant russere som alltid.
 - ✓ Russland er et nærmarked for Norge og norske reiselivsbedrifter.
- 

Top ten Schengen source countries in the world:

N o.	Country where consulate is located	Uniform visas applied for	Total uniform visas issued (including MEV)	Multiple entry uniform visas (MEVs) issued	Total LTVs issued	Uniform visas not issued	Not issued rate for uniform visas	Share of MEVs
1	RUSSIAN FEDERATION	4,133,100	4,054,685	3,350,160	1,013	61,863	1.5%	82.6%
2	CHINA	2,971,032	2,847,049	973,540	165	111,794	3.8%	34.2%
3	INDIA	1,141,705	1,012,487	632,881	1,352	123,175	10.8%	62.5%
4	TURKEY	906,862	812,108	614,066	1,390	87,651	9.7%	75.6%
5	MOROCCO	705,293	544,062	233,420	1,841	144,895	20.5%	42.9%
6	ALGERIA	668,386	374,287	110,896	1,864	287,234	43.0%	29.6%
7	BELARUS	645,722	643,474	550,656	195	1,766	0.3%	85.6%
8	SAUDI ARABIA	394,200	363,308	310,025	4,880	22,096	5.6%	85.3%
9	THAILAND	337,607	322,801	176,177	311	13,027	3.9%	54.6%
10	UNITED KINGDOM	277,743	258,744	149,621	1,044	12,013	4.3%	57.8%

Figures published by the European Commission on 4 May (compiled with data from MS capitals) show that the consulates of the Schengen States received almost 17 million applications worldwide for short-stay visas in 2019, a considerable increase of 5.9% since 2018. The three largest source countries all experienced solid growth, with applications in **Russia** registering a strong increase of +11.8% compared to 2018 and topping 4 million for the first time in five years. However, this is still much lower than the all-time high of 7 million visa applications registered in Russia in 2013.

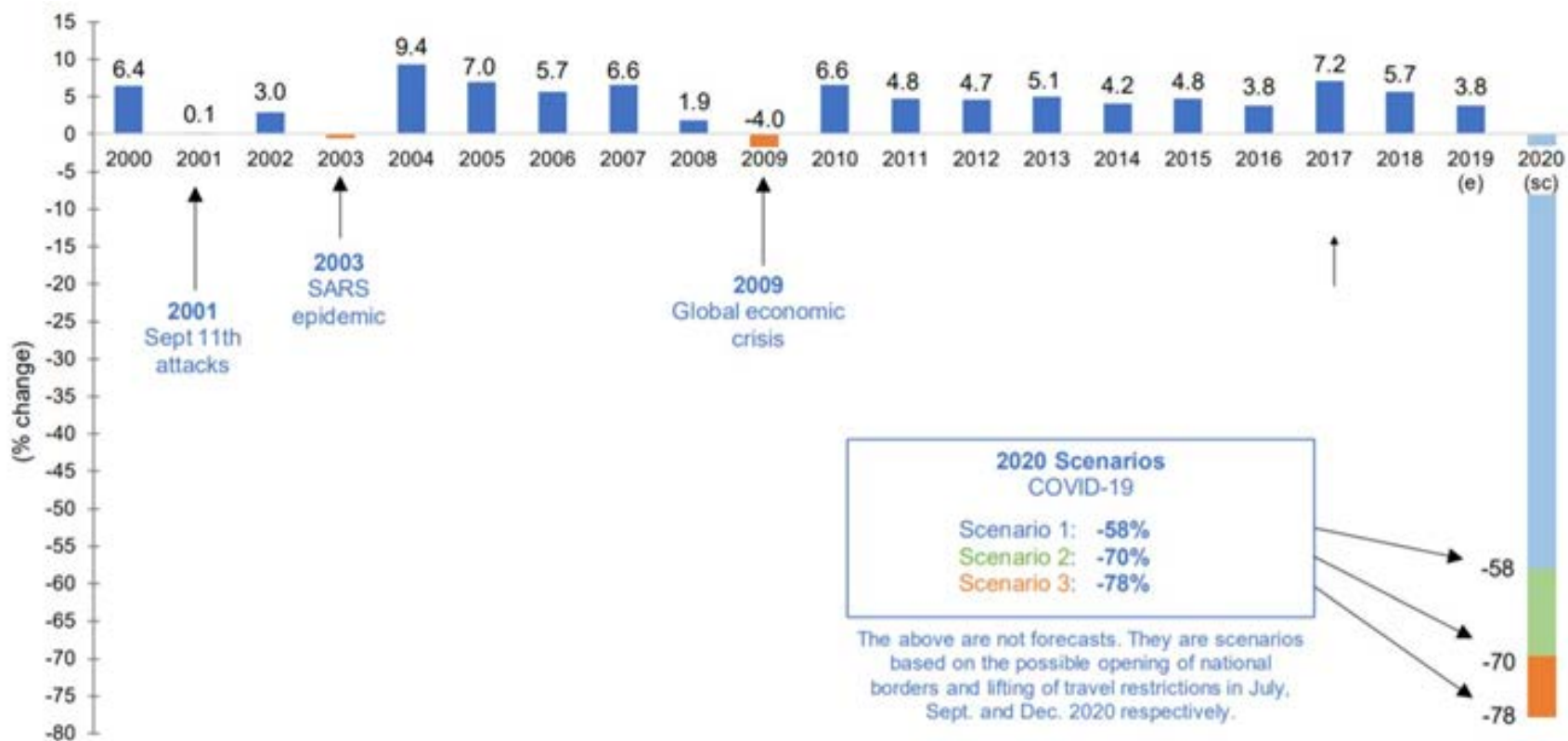
Russland: Turoperatører å merke seg

Status før COVID 19

- ✓ Turoperatørene bekreftet økningen i etterspørselen ved sesongstart i 2020.
- ✓ Det ble booket flere gruppereiser, og interessen til Norge som reisemål økte.
- ✓ Økning i etterspørselen etter turprodukter til Norge hadde ledet til at turoperatørene lanserte nye produkter i tilknytning til Norge:
 - programmer med fleksible datoer og varighet;
 - utvidet sesongen, nye vinterturer;
 - turer til ulike norske regioner;
 - ikke-standard programmer, slik som kombinasjoner av omvisningsturer med fiske eller fjordcruiser.
 - mer spesifikke programmer som fokuserer på aktive produkter (hiking, biking, fishing), mat- og kulturopplevelser, luksusturer.



ANKOMST AV INTERNASJONALE TURISTER, 2000-2019. Og SCENARIER for 2020 (ENDRING I %)



STATUS ETTER COVID - 19



- Russiske turister anser Norge som et trygt og attraktivt reisemål, lite skadet av Covid-19.
- I tillegg er det et pluss at Norge er tilgjengelig med bil og bussturer.
- Nå venter russerne på å få vite når grensen åpnes igjen, slik at de kan utforske norsk natur i kombinasjon med aktiv ferie.
- En nylig undersøkelse blant mer enn 1500 brukere av den elektroniske hotellbooking-tjenesten ostrovok.ru viser at 49 prosent av russiske turister savner turer til Europa.
- Flertallet av russiske turister (88%) foretrekker å reise på ferie til utlandet etter at den epidemiologiske situasjonen vil ha blitt normalisert. 44% av turistene i nær fremtid ville reise på ferie til Europa, 23% til Asia. Bare 12% ville velge å reise til Russland.

PROGNOSE ETTER PANDEMIEN

La oss tenke oss at den epidemiologiske situasjonen i verden har stabilisert seg, og Du planlegger din ferie. Hvor er Du mest sannsynlig vil reise? i %

Europa	44
Asia	23
Russland	12
USA eller Canada	4
CIS land	3
Andre	14

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Tenk deg at den epidemiologiske situasjonen i verden har stabilisert seg, og du planlegger din ferie. Hvor er Du mest sannsynlig til å reise? i %

	18-34	35-44	45-54	55+
Rusland	7	13	13	17
CIS land	3	1	7	3
Europa	42	41	41	50
Asia	25	32	19	15
USA eller Canada	6	1	3	3
Annet	16	12	17	13

De eldre turister er, jo mer de er klar for å reise til Rusland etter den epidemiologiske situasjonen har normalisert (17% av respondenter over 55 år gammel prioriterer Rusland som et prioritert reisemål). På samme tid, blant unge reisende (fra 18 til 34 år gamle) Rusland er en upopulær reisemål (7%). De foretrekker å reise på ferie til Europa (42%) eller Asia (25%).

Hvordan tror Du kostnadsnivå vil endre ... etter slutten av pandemi?", i %

	flybilletter	togbilletter
Kostnadene vil øke	74	62
Det vil være på samme nivå	18	33
Kostnadene vil reduseres, men bare litt	7	4
Kostnadene vil bli betydelig redusert	1	1

De fleste turister som **forventer en prisøkning for tog og flybilletter** etter slutten av pandemien. De er mer sannsynlig å forvente en prisøkning for flybilletter enn togbilletter (74% mot 62%).

Hvordan tror Du det kostnadsnivå for overnattingen... vil endre seg etter slutten av pandemi?, i %

	Russiske hoteller	Utenlandske hoteller
Kostnadene vil øke betydelig	72	56
Det vil være på samme nivå	20	27
Kostnadene vil reduseres, men bare litt	7	12
Kostnadene vil bli betydelig redusert	1	5

Russiske turister er også **forberedt til å se at hotellkostnaden vil øke**, og det er forventet at priser for russiske hoteller vil øke mere enn utenlandske (72% mot 56%).

Reiseplaner etter lettelse av restriksjoner



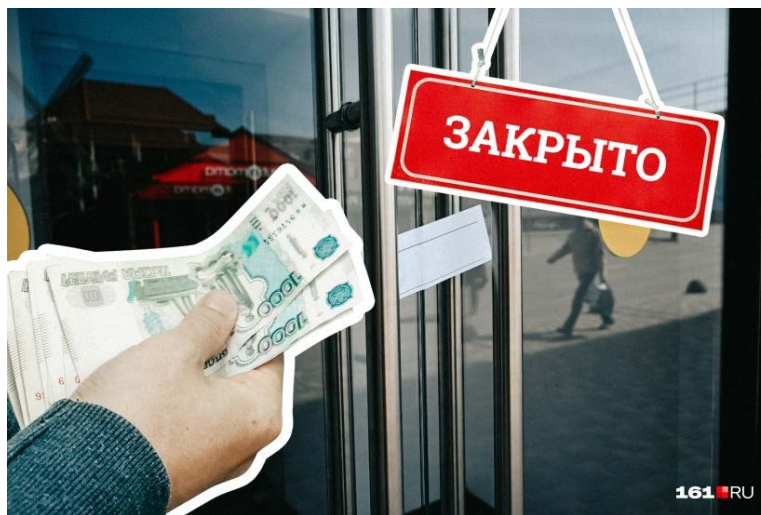
Ifølge Ipsos studie etter at restriksjonene er opphevet, og 36% av respondenter planlegger å reise på ferie i Russland i de neste seks månedene, og 20% av respondenter i byer med millioner av mennesker i alderen 18-65 år planlegger å reise til utlandet. Undersøkelsen ble gjennomført i perioden 18-20 mai 2020.

Tilbakemeldinger fra russiske turoperatører: SALG

- Den viktigste loven blir forhåpentligvis vedtatt om overføring av turoperatørers forpliktelser til turister for turer som ikke fant sted på grunn av coronavirus pandemi. Reiselivsnæringen i Russland kan tilby andre reiselivsprodukter og ikke ha krav til å returnere midler til kunder på en gang. Dette er nøyaktig hva som kunne ha ødelagt reiselivsbransjen i Russland.
- Turoperatørene flytter på turer til høsten og vintersesongen 2020/2021 og til neste sommeren.
- Bookingen for resten av 2020 er **stoppet helt**, siden situasjonen er så uavklart.
- Når grensen åpner igjen, vil salget for høst og vinter produkter starte. Ikke tidligere enn **august/september 2020**.
- **Etter nyttår 2021** – vil salg av sommer produkter 2021 starte i Russland.
- Mange selskaper er aktive og satser på E-learning og webinarer.
- Ingen store eller viktige turoperatører som selger Norge, er i konkurs per i dag.

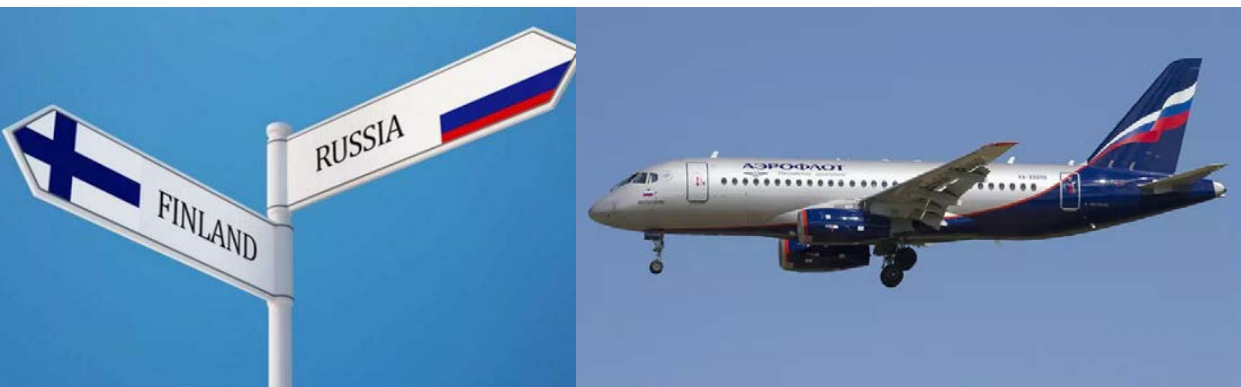
Tilbakemeldinger fra russiske turoperatører: UTFORDRINGER

- Den største utfordringen er å overleve.
- Mange turoperatører har problemer med å refundere penger til kunder, de kan ombooke tur til utgangen av dette året, eller til 2021.
- Alle avbestillinger med norske partnere ble gjort i henhold til standard prosedyrer. Alle er meget takknemlig for det!
- Noen turoperatører har utfordringer med å ombooke flybilletter i Norge (Norwegian, SAS).



Grensen situasjon & reiseråd

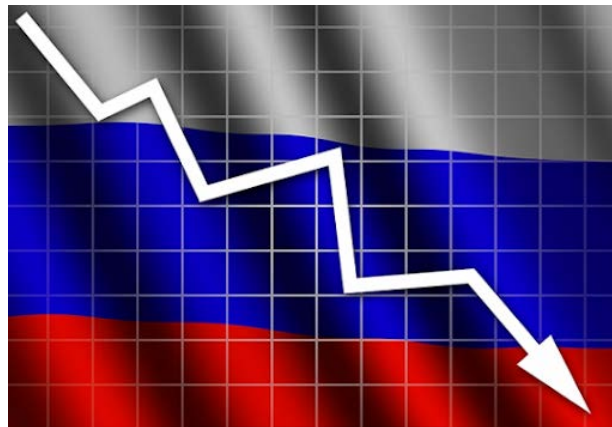
- Ifølge representanter fra det finske generalkonsulatet i St. Petersburg, i spørsmålet om å løfte restriksjoner for å krysse den **russisk-finske grensen har blitt utsatt til 14 juni 2020**. Suomi har planer om å åpne grensen med Russland fra 22. juni. Men russiske myndigheter uttrykker et håp om at grensen mot Finland vil være fullt åpnet før i begynnelsen av August.
- Det russiske utenriksdepartementet antydte at åpning av grenser med EU vil ikke skje **før i juli**.
- Det største russiske flyselskapet **Aeroflot** suspendert internasjonale flyvninger opp til **1 august 2020**.
- Det russiske innenlandsmarkedet er gradvis åpnet fra **1. juni 2020**.
- Reiseråd fra den russiske regjeringen – **vær hjemme og reis i Russland**.



I  **RUSSIA**

Prognosen av BNP og økonomisk situasjon i Russland

- Russland er på vei til en resesjon. BNP fra januar til april falt med 1,9%.
- IMF anslår i en ny rapport at BNP i Russland vil reduseres med 5,5 prosent i 2020, men at man vil se en bedring i løpet av 2021.
- Russlands sterke side er en relativt lav andel av tjenester som er mest sensitive til karantene, og en høy andel av offentlig sektor i strukturen av BNP og sysselsetting.
- I tillegg har landet store akkumulerte reserver og veldig liten statsgjeld.
- Russland har historisk utviklet en type land og samfunn som fungerer svært godt i mobilisering-modus.



Norway Tourist Board in Russia – Visit Norway



**Travel
Trade**

Local activities



**Mass
Media**

Global activities



**Social
Media**

Global activities

ВЫБИРАЙ И БРОНИРУЙ 
VISITNORWAY.RU

Web Site

VISIT NORWAY - TRAVEL TRADE DIGITAL ACTIVITIES 2020



Database over Russian
tour operators and
travel agencies



Digital Workshops,
Digital Webinars,
Digital NTW



Norway Expert
Official eLearning

Online e-learning
academy for tour
operators



Digital Fam trips for
Russian tour operators



Newsletters,
competitions, KAHOOT



Russland: Turoperatører som meldte seg på NTW 2020

Det er 21 turoperatører (27 deltager) som ble påmeldt fra Russland:

- Bussturer:** West Travel, Tourtrans Voyage, Viking Travel, Bon Tour, Petrotur
 - Grupper/FIT:** PAC GROUP, JAZZ Tour, GOOD TIME, Russian Express (NEW)
 - FIT:** Conti Plus (NEW), Grand Tour (NEW), IRIDA (NEW), Svoi Ludi (NEW), Quinta Tour, ICS Travel Group, Scantravel
 - VIP/Luxury:** Sodis Travel Company (NEW), Ulysse Travel Club (NEW), Tour Prestige Club
 - Fiske turer/aktive ferie:** World Fishing Russia (NEW), Travel Company Gamajun (NEW)
- 

Digital Workshops

**Russia- Moscow &
St Petersburg
Workshop
25th-27th August**

**MICE Workshop.
October 27th**

Webinars with Norwegian partners in Russia

Target group: product managers from Moscow and St.Petersburg

Theme / product: to be decided together with Norwegian partner.

Date: to be decided together with Norwegian partner.

Length: maximum 1 hour

Price: 750 NOK



Informasjon til norsk reiseliv



- Ikke gi opp, men **tenk på fremtiden**. Folk vil fortsette å reise.
- **Norge er og blir et viktig naboland**, tilgjengelig for de fleste pr bil og buss.
- Det er **usikkerhet om norske leverandører**: hvem som vil overleve krisen. Det er viktig for russiske turoperatører å vite det for å lage nye bestillinger for neste sesong. Informasjonen bør være strukturert pr. region.
- Turoperatører ber om å **få nye priser for 2021**.
- Turoperatører er **sultne på digitale aktiviteter** (Webinars, Workshops) med norske leverandører om nye programmer/nye produkter (for eksempel: GO VIKINGS, tematiske turer, ski ferie, MICE produkter).