



Visit Finland

Webinar: COVID-19 - Outlook on tourism industry in European markets after the outbreak

UK, Spain, Russia, Italy, France & Germany

23.04.2020

Main topics

- Update on the market
- Visit Finland actions on the market
- Greetings and opinions from European Travel Trade
- Vision: What happens after the coronavirus?
- Opportunities and trends

Agenda

- 1. Introduction | Mervi Toivonen**
- 2. Overnight statistics and estimated losses | Katarina Wakonen**
- 3. Market presentations | Visit Finland market representatives**

10.25 United Kingdom – Caroline Stanton

10.35 Spain – David Campano

10.45 Russia – Aleksandra Shakhnovich

10.55 Italy – Barbara Demartin

11.05 France – Sanna Tuononen

11.15 Germany – Jyrki Oksanen

- 4. Q&A | Visit Finland market representatives**





Mervi Toivonen

Director, Head of Global Sales Promotion
Visit Finland | Business Finland

Katarina Wakonen

Manager of Business Intelligence
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Scenarios for Finnish Tourism Industry

- Co-operation between MEE, Statistics Finland, The Finnish Hospitality Association MaRa and Visit Finland
- Three scenarios for decision making
 - Baseline scenario
 - Optimistic scenario
 - Pessimistic scenario

How Visit Finland is monitoring the markets

Visit Finland is tracking the mood and travel intentions of our markets, to identify the right time to start market activities:

- Data from booking engines (flight searches and bookings)
- Google Trends Analysis
- Visits on visitfinland.com
- Market Updates
- Start using Future Platform –tool
- Nordic co-operation

A significant drop in inbound travel is expected across all regions

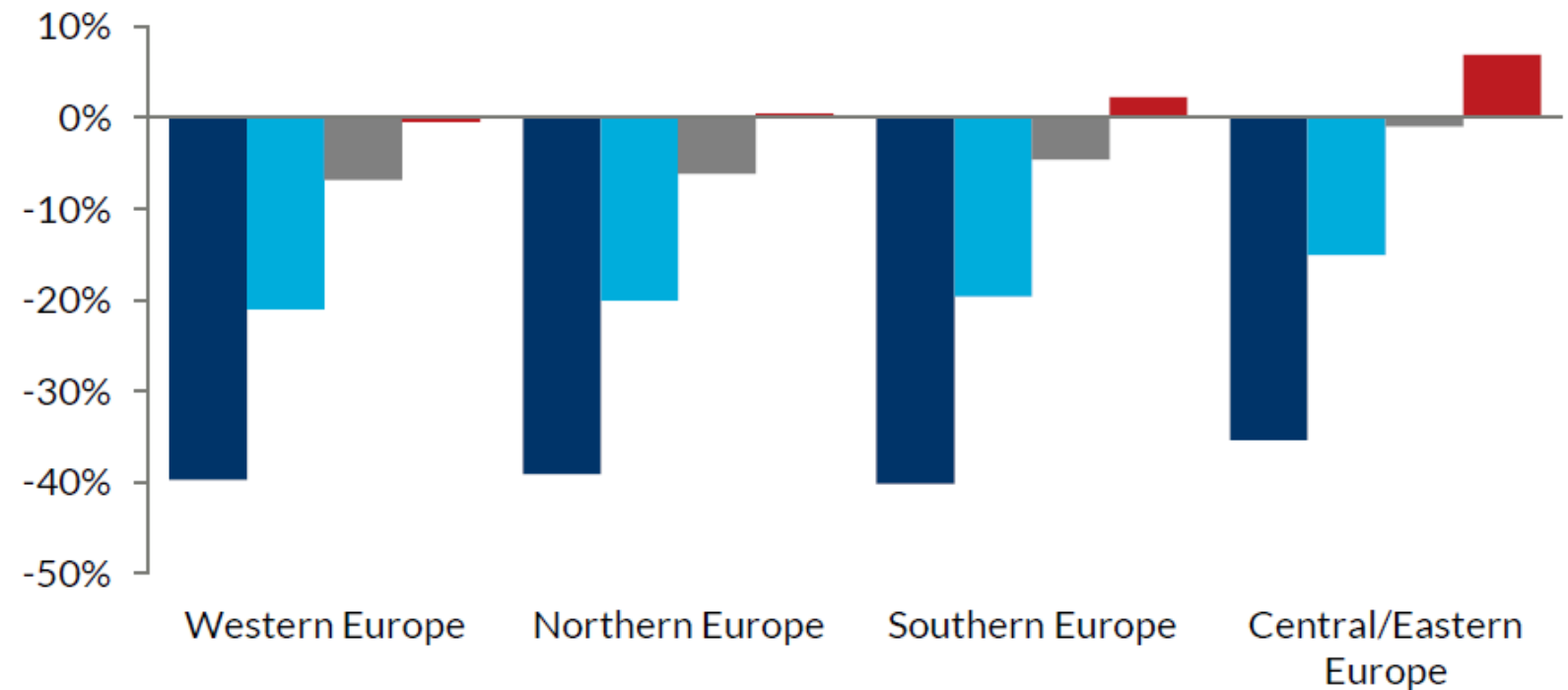
European inbound travel is forecast to decline 39% in 2020, equating to 287 million fewer international arrivals

Change% from previous year		
	2020	2021
Denmark	-40	37
Finland	-36	32
Iceland	-40	34
Norway	-36	31
Sweden	-36	34

Europe inbound travel by destination region

% difference from 2019 levels

■ 2020 ■ 2021 ■ 2022 ■ 2023

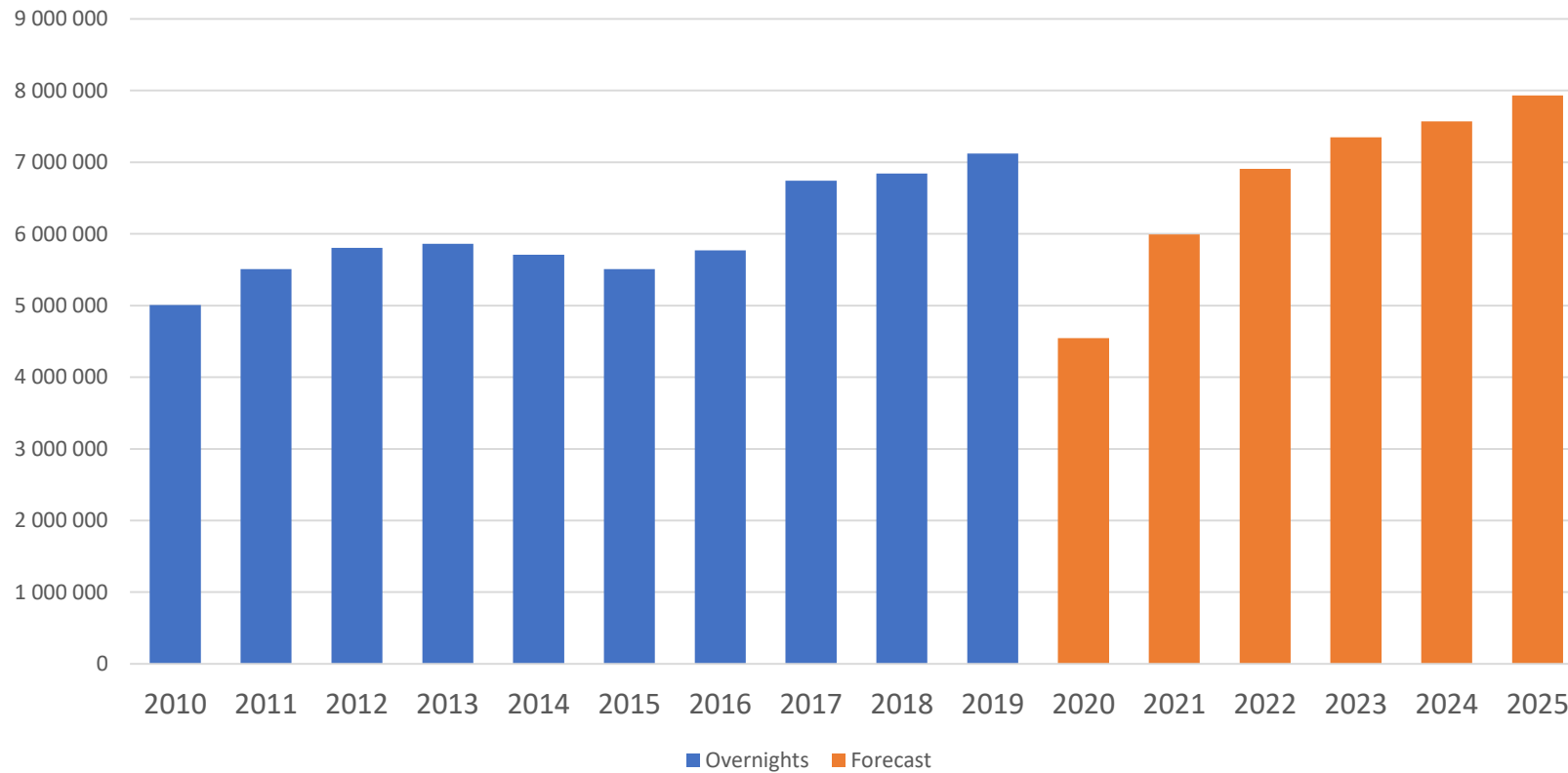


Source: Tourism Economics



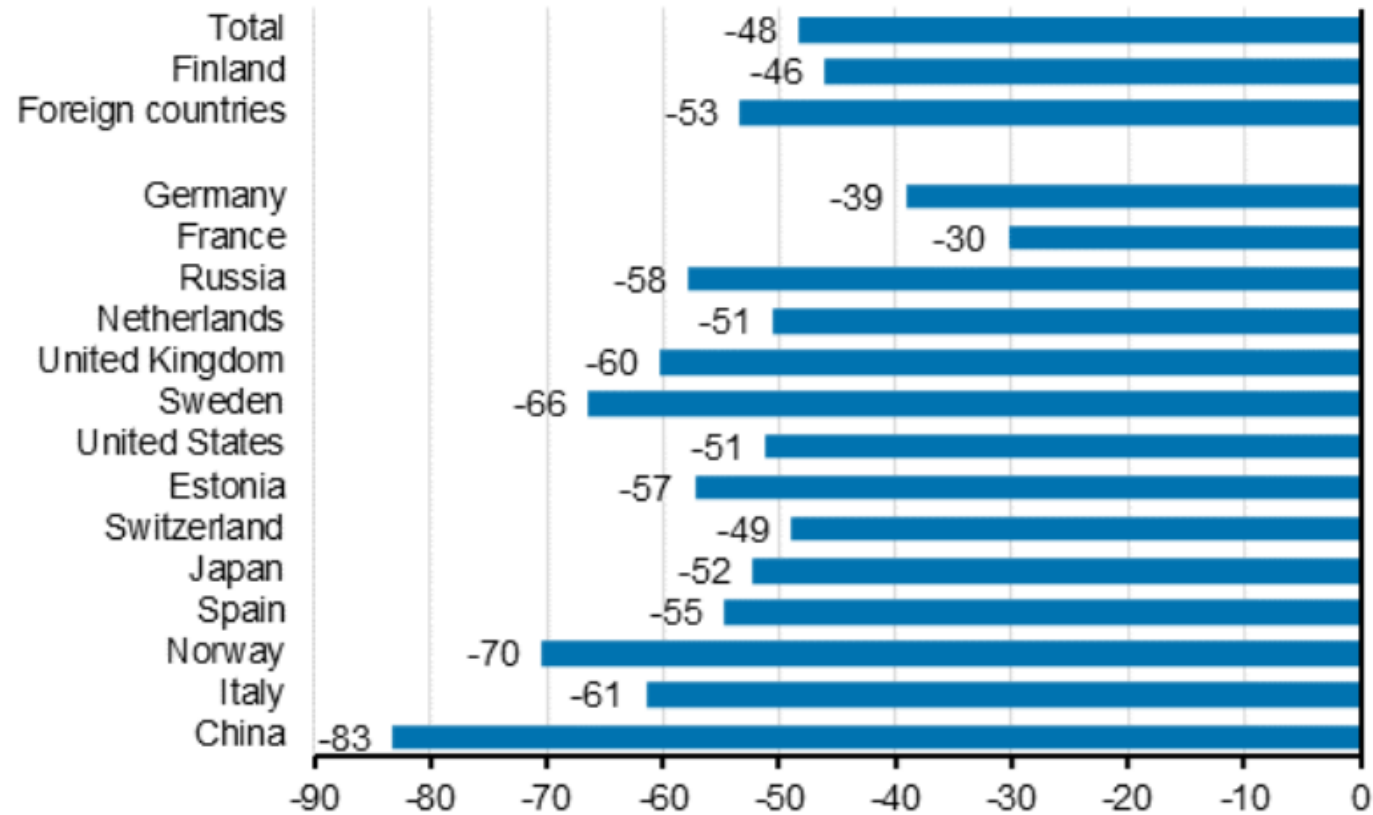
Oxford Economist Forecast:

- 4,5 million foreign overnights in **Finland** in 2020 – a drop of 36% from previous year.
- Last year's level will be reached in 2023.



Nights spent by foreign tourists decreased by 53% in March 2020

Change in overnight stays in March 2020/2019, %



All top European destinations show similar outlook for the Summer

Top 10 European destination countries for long-haul travellers – June, July & August 2020

	YoY % var	% Share
Italy	-57.5%	14.0%
United Kingdom	-54.7%	14.0%
France	-54.0%	10.5%
Spain	-56.7%	8.4%
Germany	-53.5%	6.7%
Russia	-42.6%	5.0%
Greece	-47.7%	4.2%
Netherlands	-52.8%	4.2%
Portugal	-50.7%	3.5%
Ireland	-42.6%	3.4%

* Only excludes Intereuropean travel



Bookings confirmed as 12 April 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

visitfinland.com 1.2.-19.4.2020

Compared to same period in 2019



Coming up: innovative content ideas like a Finnish recipe generator

- Paid traffic has decreased **significantly due to all paid campaigns being on hold at the moment**
- Organic traffic has decreased but **much less** than paid traffic
 - Sweden and Japan are the countries that have **increased** in organic traffic
 - Russia and Italy have decreased only a little bit, less than 10%
 - Bigger organic decreases from (over -30%): China, Germany, Spain
- **Most read articles** including all language versions:
 - 21 Reasons to Love Finland
 - 8 Most Beautiful Northern Light Shots from Finland
 - COVID-19 Coronavirus Guidance for travelers to Finland
- Most traffic still comes from **Google search**, this has not changed – The potential demand has not suffered!

VF social media 1.2.-19.4.2020

Compared to same period in 2019



- Social media posts have been driven down, we try to stay neutral and respectful
- Content has been focusing on calmness and how locals live during these times (especially on Instagram that is 100% user-generated content)

FACEBOOK (ENG) – Popular posts

- "Finland chosen as the happiest country in the world"
- "Travel to Finland on hold because of the Coronavirus"

INSTAGRAM (ENG) – Popular image themes

- Ice swimming, winter landscapes, cute animals, Northern Lights

TWITTER (ENG) – Popular tweet themes with @ourfinland

- Exceptional images during the crisis, like empty Helsinki streets
- Beautiful nature images and ice swimming



Caroline Stanton

Market representative | United Kingdom
[Visit Finland](#) | [Business Finland](#)

United Kingdom – Update on the market

General Information

PM Boris Johnson addressed the nation on the 23rd March and the UK went into lockdown with an extension review 7th May 2020. Most businesses want a clear exit strategy; however the Government will not make any major decisions until we at least see the death rate lowering and coronavirus cases falling to a low level. A vaccine is being trialled today 23rd April in the UK, developed by Oxford University

Flight situation

- Finnair 2 flights per day from London Heathrow - Helsinki until 30 June
- Norwegian has cancelled all flights until the end of June
- EasyJet has secured funding to ground its planes for 9 months

Travel bans

- The Foreign Office has changed its restrictions to advise against all non-essential travel “indefinitely”. The previous travel ban was put in place on 17 March for an initial period of 30 days, but the advice has now been extended with no end date in sight.
- UK has not closed its borders - Professor Van-Tam who discussed the reasons for not closing the borders more in-depth. He said: “Our scientists have been very clear from the outset that this would not work as a measure to prevent the ingress of coronavirus into the UK.
- Brits are not allowed to travel to all but 11 countries in the world

United Kingdom – Update on the market

Travel Trade

- Over 140k UK companies have **applied for Furlough**, the government's Coronavirus Job Retention Scheme, which sees the state cover them for up to 80% of their employees' wages if they cannot work because of the coronavirus. The scheme is extended until June. Airlines, tour operators and travel agencies have all taken advantage of this generous scheme
- The government is set to **underwrite cancellation refunds given out by the travel industry as part of a £4bn relief package**. They are drawing up plans to guarantee refunds to customers of holiday companies that have had their holiday cancelled
- In a survey of 416 travel agents across the UK & Ireland, **almost one in three (32%) had made a sale in the week ending 10 April**, despite high street premises being closed and many retail staff believed to be on furlough. 75% said sales were down from the previous week – and **58% said they had received no customer enquiries at all**.
- Tour operators have been **postponing bookings and booking new holidays for 2021 and 2022**
- TTG Travel Agent Tracker survey showed that **72% of UK agents want to hear from suppliers about training and business support** during the ongoing crisis
- UK Travel companies are working together in April to give **NHS workers a free holiday once travel restrictions are lifted**. Launched earlier this month, the #TreatOurNHS initiative has since received an outpouring of support across social media. With over 100 accommodation owners offering their services to the NHS, frontline workers will be treated to a selection of free holidays

United Kingdom – Actions on the market

- All UK FAM's events and workshops are postponed or cancelled for 2020
- Communicating daily with the travel trade
- Virtual meetings
- Zoom and Teams training and webinars- most recently 16 April 22 travel industry trained on 'Finland From Your Armchair' AITO (Association Independent Tour Operators) organised slots for its Tourist Board members
- Antor (Association National Tourist Boards) are organising virtual meetings on a weekly basis to share news, ideas with others and they are arranging some virtual trade networking opportunities
- Visit Finland are taking part in 'Antor Meets the Travel Trade'. This will take place 8 June using Travel EXPO365 technology
- Working together with TTG, Travel Bulletin and other Travel trade media
- Regular communication with our PR agency
- Finlandtravelexpert.com online training updated – travel Industry incentive to complete the training - 'love to shop' vouchers they can spend at supermarkets and online retailers
- Planning for 2021 actions in the UK



United Kingdom – Greetings and opinions from Travel Trade

Baltic Travel Company

"We have clients who have postponed their holidays, but most of the affected area ones have decided to cancel completely. They have said they would like to book with us again later, so we're keeping our fingers crossed for that!"

Destinology

"At the moment we are suffering high cancellations and not taking any new enquiries, it's about safety first and ensuring our customers are all happy campers, which feels good"

Railbookers

"My team has worked hard to postpone most bookings, carefully calling every one of our valued customers. We remain positive about our developments with the Nordic countries including Finland for 2021. We appreciate your support"

Winged Boots

"We are working tirelessly and offering flexibility with rebooking and amending. We are booking holidays with increased flexibility up to and including departures for 2022 for additional peace of mind."

Happy Tours

"Together we will cross this horrible time and bring back people around the world to your beautiful Finland"

Marco Polo

"Post coronavirus I think people will want destinations away from crowds with lots of space so today I have started mentioning the Finnish Lake District to Marco Polo clients"

United Kingdom – What happens after the coronavirus?

- Immediately after the lockdown ends, it is predicted that a **surge in interest as Brits look to make up for lost time, missed Easter holidays, missed Summer**
- There will be undoubtedly a **boom in domestic UK travel** with hotels set to entice customers with attractive prices and value-added experiences.
- **Eurotunnel, ferries and villa companies** are finalising plans to make it attractive for Brits to drive to France and Spain for self-catering holidays
- Taking holidays are high on the list of things consumers want to do when the crisis is over, **over 60% say that they would want to wait for a period of a few weeks after the confinement is over before feeling comfortable enough to book**. 1 in 5 say that they won't feel comfortable about booking a holiday until vaccines against the coronavirus are available
- **18 – 20-year old's** will be some of the first to travel abroad as they are young, adventurous and are not as scared of the virus as research shows they generally have mild symptoms and recover well
- Concerns about the **over 70's market and if they will have to remain in lockdown** in the UK for a prolonged period. Also travel insurance premiums will be high when they are able to travel

United Kingdom – Opportunities and trends

- **Outdoors and nature** - nature, space, wellness and clean air - (Only 9% of Britons want life to return to "normal" after the coronavirus outbreak is over, a survey suggests, people have noticed significant changes during the lockdown, including cleaner air, more wildlife and stronger communities)
- **Luxury** – a resilient group looking to travel as soon as they are can do so. These include:
 - London based, **higher income 80k plus**, investors, well-connected, well-travelled , work City of London, in Finance, Tech. Law Media and Marketing - with the flexibility. finance and passion to travel quickly before winter
 - **Affluent families** with young kids with the flexibility and finance to travel before schools (hopefully) back in September
- **Online searches** ran mid-March to mid-April on eDreams ODIGEO show July, August, September are at similar levels, making it clear that British user's willingness to take their holidays throughout the whole of Summer into September. 32% of the searches in April were to continental countries.
Gen Z, millennials and Gen X make up 26% of the online searches
- **Develop good digital tools** and virtual training for travel companies
- **Develop more price conscious packages** for the younger Brits that can embark on travel first
- **For Finland there is now an opportunity to become a high-desire and sustainable destination** when Brits can finally travel

David Campano

Market representative | Spain
Visit Finland | Business Finland



Spain – Update on the market

General Information

- Declared the State of Emergency last 14th March
- Lockdown until 9th May
- The Spanish government is allowing some business and industrial activity to restart as of 14.04.20 as long as they ensure the safety of their workers

Flight situation

- Finnair plans to restart operations in Spain as of 1.07
- Norwegian expects to resume their operations in Spain beginning June

Travel bans

- Spanish Foreign Affairs Ministry advises against traveling to any country in the world unless it is essential until further notice.
- On March 16, the Spanish government announced the closing of its land borders, allowing only citizens, residents and others with special circumstances to enter the country.

Spain – Update on the market

Travel Trade

- IMF (International Monetary Fund) forecasts 8% **economic contraction** in Spain due to coronavirus crisis
- **Unemployment rate** could soar to nearly 21%, (7 points above 2019 level) according to the organization's 'World Economic Outlook' report - April 2020
- **Tourism industry** in Spain represents almost 15% of the GDP ; following **Exceltur** (Alliance for Excellency in Tourism) Tourism GDP in Spain, due to the unfavorable effects of Covid 19, would decrease in 2020, -54,733 million euros, a -32.4% drop.
- Main **travel agencies associations** have been lobbying Spanish government to change the current EU Directive policies on package travel arrangements where TA's are obliged to refund the money back to the customers in case of cancellations. It is already agreed as a temporary measure that a voucher may be offered in lieu of a refund. Objective is to secure as much as possible the survival of the sector because of their financial difficulties
- **Survey** carried out to more than 350 agents in Spain at the end of March: asking "what do you think will be the most demanded destination until the end of this year" the vast majority said domestic tourism will lead the recovery in summer time, medium haul destinations within Europe are expecting to climb up for winter time and long haul destinations will start to have demand beginning 2021
- Huge **social media** campaign from main TA's/TO's: "**Save tourism**: don't cancel your trip, postpone it"

Spain – Actions on the market

- Monitoring closely the situation and getting feedback from our main partners on a daily basis.
- Meetings with Travel associations in Spain. (CEAV. ACAVE...etc.)
- All our workshops and fams are suspended until further notice. Will revise later on if posible to carry out any of these activities in Q4.
- Promoting webinars and inspirational content with travel partners (i.e. Booking Fax) / Viajes El Corte Ingles ("viaja desde casa") / Travelview
- Recovery Plan 2020: ready to reactivate the market with our existing joint marketing agreements this year asap: most probably winter season.
- Working on Market Plan Strategy for 2021

Spain – Greetings and opinions from Travel Trade



- **Jordi Rivera, CATAI** : "Nordic countries in general and Finland in particular are perceived in the market as safe and reliable destinations; the price factor will be decisive, much more than factors such as the tourism sustainability of the destination or the product in a first stage in order to be able to generate demand and cover fixed costs that they can't cope at the moment. If we want to keep the operations already planned for December, we need from the Finnish suppliers as much flexibility as possible as we cannot take risks".
- **Francisco Erena, TUI** : "We believe that demand will begin to recover for the winter season; our message to our customers is clear: book now with all the flexibility when changing or canceling your itinerary.
- **Roza Pazos, POLITOURS**: "I hope we can start the recovery for winter time in Lapland; we have to make sure that we are competitive enough in pricing and offering to revive the market"
- **Inigo Castillo, PANAVISION**: "Our core business are groups; we are re-inventing ourselves to offer FIT's, as groups segment will not recover until at least 2021.
- **Oriol Balmaña, TRAVELKIDS**: "We have not noticed any cancellations (yet) on Lapland winter travels for families. Instead of this we keep on a good promotions and selling rhythm for our operations planned next winter. Small groups and tourism based on "living nature" sport programs will be sure more demanded as people is going to be crazy to do things completely opposite to "stay at home" memories.
- **Javier Roig, FINNAIR**: " We expect to start recovering the Finnish market for Q4"
- **Antonio López de Ávila, TDDS (Tourism Data Driven Solutions)** : "mantra of the new tourism: Travel is FUN, SAFE & HEALTHY!"

Spain – What happens after the coronavirus?

- **Observatur:** (main outbound tourism association in Spain): recovery will take place in 3 phases:
Summer (domestic tourism)
Autumn-Winter: Medium Haul destinations, Europe
2021: Long Haul

Majority of tourism associations in Spain agree on the need to "sell" security and the ability to do quick tests on travellers.

- **Domestic tourism** expected to lead the tourism industry demand recovery.
- **Rethinking** the tourism model: there is widespread common thought among the main players in the industry for after COVID-19: "no more tourism at any price mentality"
- Different **Hotel Business Associations** in Spain are working on the development of a common protocol that serves as the basis for obtaining a new post-pandemic certificate: 'COVID Free Hotels', which guarantees the safety of customers and workers of the establishments, in order to reopen then when the health crisis is over

Spain – Opportunities and trends



Opportunities: Segments

- ✓ Luxury Travel (5% increase in 2019 Vpy above the european average increase; forecasted before COVID-19 9-10% increase for 2020)-Traveller Made : more than 400 travel agents in 69 countries (20 associates in Spain)
- ✓ Wellness (Sauna)
- ✓ MICE (small group max. 10pax)
- ✓ FIT's
- ✓ Outdoor activities (social distance in a clean & safe environment etc.)
- ✓ Bleisure (Helsinki area)
- "Traditional travel agencies could become more **digital**
- Develop platform / tools aimed to create our travel agents experts in Finland (**e-learning**s, webinars, draws..etc.) become a "Sisu agent"

Trends

- **Main messages to the trade:** Emphasize our **STRENGTHS:** Nature, cleanest air, space, "the country of Healing Powers" - Linked to safety and Sustainability –The purpose of travel
- **Main message from the trade** to the finnish partners: **FLEXIBILITY** ; need to gain confidence back to the market and first rebuild volumes to our destination.
- Spanish **OTA's / GDS** studies shows strong demand for Winter 2020 (same level of searches from potential travelers as in 2019)



Aleksandra Shakhnovich

Market representative | Russia
[Visit Finland](#) | [Business Finland](#)

Russia – Update on the market

Gradual lockdown in different regions since 30.3. and at least until 30.04.2020

- Epidemic peak is expected in May-June

International transportation

- All Finnair and Aeroflot flights to Russia are cancelled until further notice
- Allegro and Tolstoi trains are cancelled until further notice
- Land borders are functioning with limitations

Travel bans

- Russian citizens are banned from travelling abroad until further notice
- Travel within Russia is not prohibited, but all the hospitality facilities are closed

Russia – Update on the market

- B2B news & expectations
 - Unemployment growth & real incomes fall
 - Overall instability risk threatening to economics and social welfare
 - Oil prices are volatile which directly affects rouble rate
- Travel communications are now focusing on dreaming and experiencing the destinations from home through inspiring consumers by videos, VR, storytelling and live streams
- Russia is investing heavily in domestic tourism development

Russia – Actions on the market

- **B2C**

- All paid marketing and media visits on hold until further notice
- Day of Finland postponed till 2021
- Tracking local influencer-marketing trends and seeking for new opportunities

- **B2B**

- Big projects currently on hold
- Arranging workshops in Moscow and St. Pete if possible, 09/2020
- Co-op with Russian TO's and Finnish partners, focus on product development

We are monitoring the situation to be ready for action when possible

Russia – Greetings and opinions from Travel Trade

Elena Kharkova, Head of Scandinavian department, PAC Group:

"It is hard to say something for the nearest future. Beginning of the summer season is already lost, but I wish to hope, that we could sell at least part of summer. Currently, we are planning our ski products. I'm planning charter flights to Rovaniemi and Kajaani, hopefully programs will be ready at the beginning of summer. We follow the situation constantly, and are ready for fast reaction to the changes"

Russia – Greetings and opinions from Travel Trade



Anna Tverdokhlebova, Director, St. Petersburg Travel Shop:

"The biggest problem is lack of knowledge when the epidemic will end. Different sources are speaking different things. In the beginning, Russian Ministry of Health was predicted June as optimistic option, and autumn as pessimistic. So, we needed to change our plans already several times. We'll take a closer look in May, if start of sales will be possible in July. Many companies are re-planning their destination range to domestic tourism, which will cause over supply.

I think, that amount of clients will decrease because of reducing income. Recovery time for regular citizens will be long. Exchange rates have been growing as well. Honestly, outlook for nearest future looks pessimistic. Currently, there is no new sales at us. We try to work with our audience; make live sessions in SoMe, lucky draws to keep people interested. For example last week we had Lumene-themed live session.

When borders will be re-opened, we will focus on budget tours, that combine cultural aspect with relaxation, beautiful nature, anti-stress. It would be great from Finnish side to show clients, that country is happy with opening the borders and happy to receive Russian tourists – for example some special greetings at the hotel for the group would be very nice. **We will be saved by good prices, reasonable deadlines and high service quality.** One motivator as traveling to Finland is 5-year Schengen visa.

For the new year period, we wish to see offers for budget Russian-speaking holiday programs. But programs should be authentic, not "russian-style". It would be great to see authentic Finnish offerings and Finnish food. Some health-oriented programs could be also in trend in my opinion, but of course everything depends on the price."

Russia – Greetings and opinions from Travel Trade

Viktor Topolkaraev, General Director, Intourist:

"If the situation with coronavirus continues under optimistic scenario, at least domestic tourist market can be re-opened during the summer. Outgoing and incoming travel will resume in autumn-winter. It is important to understand, that after border re-opening people will still need at least one month to make a decision to travel".

At least, the domestic market segments will change; first travelers will be young adults, because families will be afraid of traveling for a while. Demand for flights will be reduced as well; people will start traveling more by car. Flight operators should reduce their prices, so people will be interested in their offerings again, the demand needs to be stimulated"

Darya Domostroeva, Head of Media and Partnerships Russia, Intourist:

"First tourists to Finland will be inhabitants of North-West region of Russia. Most of them will use own cars asking TO for booking accommodation or other services. Our recommendations for the Finnish partners are as follows: offer maximum commission percentage for tour operators, participation in different marketing actions, developing online maps, offering some bonuses for tourists – for example, Israeli hotels are offering free upgrade to a full board if a tourist booked a half board"

Russia – Greetings and opinions from Travel Trade

Artur Muradyan, General Director, "Space Travel":

"It is too early to speak about the deferred demand in Russia after corona pandemic, we don't have enough facts. But already now, it's clear, that quite a lot will depend on those countries, that will open their borders for Russians first. So far, it's obvious that Thai option with virus test certificates won't stimulate the demand, even if the flight connection resume. Theoretically speaking, when the restrictions are lifted, the first wave of tourists might consist of young travelers. The elderly people are highly unlikely to go anywhere until winter 2021."

Taras Kobishchanov, General Director, "Russian Express":

"After coronavirus, the demand will largely depend on the countries that will be opening their borders first, and how long it will take for other destinations to re-open. Therefore, due to the limited offer, supply will create the demand. For example, if the Black sea resorts are open up, their key visitors will be families and senior travelers. If we look at the situation when the whole world will be open again, I believe that Russian young adults will start traveling to the Western Europe, Goa and Thailand."

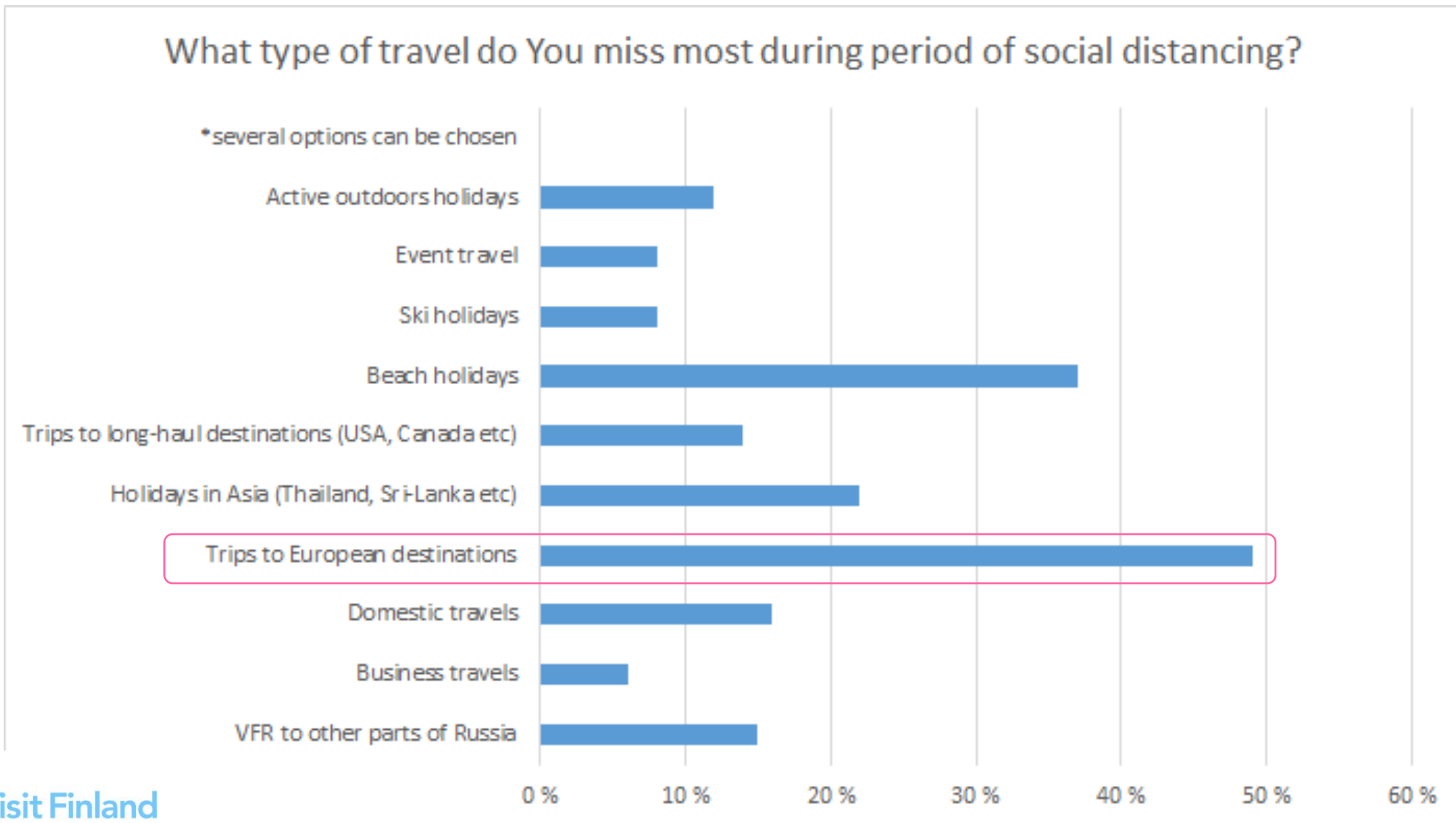
Russia – What happens after the coronavirus?



- It may take incomes several years to return to the pre-virus levels
- A large number of TAs and TOs may go bankrupt
 - Tourism is not the only industry with a pessimistic revenue outlook
- Domestic travel will recover first
 - Travel to the neighboring countries might "open" next
- International travel: land borders probably will be opened first
 - Possibilities for car & bus travels
- Finland is considered as a safe and clean destination

Russia – Ostrovok.ru poll

Source: Ostrovok.ru, 04/2020



Russia – Opportunities and trends

- Luxury segment
 - Cottage escape to the nature, soft activities
 - Safety and cleanliness as one of the USP's
- Budget sightseeing tours and cruises
 - More experiences at lowest prices
 - Special offers, commissions, x-over
- Mid-class will be more looking for cheaper products than before

Russia – Opportunities and trends

- Main trends over the previous years to be continued:
 - Personalization
 - Online services
- Business travel:
 - Technical visits, sales missions combined with bleisure & vocational training

Reit Rimmel, CEO, Lux Express Group:

"According to the recent poll held amongst 1 500 St. Petersburg clients, 85% of them are planning to travel abroad within the first three months after the border-crossing restrictions are lifted. Half of the respondents are planning to travel to Estonia, and Finland was indicated second by every fifth respondent"

Barbara Demartin

Market representative | Italy
Visit Finland | Business Finland | AIGO Srl



Italy – Update on the market

Economic background

- **Lockdown** from 9/3 until 3/5 (up to now)
- **Recovery plan:** more than € 400 billions for the Italian companies
- **Support to tourism:** up to € 5 billions to finance the "Bonus for domestic tourism" in Summer 2020
- **GDP & Employment in Tourism:** 13.2% GDP; 3.5 millions Italians employees (15%)

Tourism Industry

- **National Association of Tour Operators (ASTOI and FTO):** Manifesto for Italian tourism to relaunch Italian travel industry
- **Flight connections:** 17 Italian airports are operating (out of 126)
 - Finnair cancelled flights until the end of June
 - Ryanair cancelled over 90% flights till 30/4
 - Norwegian cancelled flights till May (estimated to postpone till June)
- **B2B news:** TAs and TOs are on layoffs/holidays, TAs are closed to the public until 3/5. TOs are rescheduling cancelled trips for May/June

Italy – Actions on the market

- **Market intelligence:** qualitative survey – interviews to trade operators to monitor their work and contacts with clients during this situation, opportunities to share with DMOs based in Italy, sentiment and forecasts; brochure audit
- **Communication and training:** regular communications, bimestral newsletter and VF webinars (e.g. Spring in Finland, Finnish culture, Outdoors, nature, national parcs)
- **#stayHomedreamFinland:** FOC online brand campaign with eDreams for 1 month
- **“A coffee in...Helsinki”** webinar: coop with Il Diamante TO – Quality Academy on 28/5 (exp. 500 TAs)
- **Finland Video Show** on FB profile with Alpitour (96,000 followers) and Giver Viaggi (82,000 followers) in April/May
- **“Discover Saimaa region”** webinar: coop with Gattinoni network on 19/5 (1,000 TAs), as follow up after fam trip in January 2020
- **“Around the world”:** quiz game by Turismo & Attualità Academy (30,529 subscribers) with questions on 90 destinations including Finland and Denmark , 1 month, starting on 16/4
- **Finland specialists:** annual online training course on Finland with Turismo & Attualità Academy (30,529 subscribers)

Italy – Feedback from the Travel Trade

In general, there is a great desire to restart, according to safety rules for travelling (no queue at check-in, distance on flights, busses and restaurants, sanitization, etc.)

- Reprise of business in Summer (mainly Italy and short haul)
- Long haul travels expected to restart from Autumn (already some bookings from October)
- Training and online contents are the keywords*

Some statements from TOs

- **Cristina by Giver Viaggi:** “we are working on the Winter season but we think positive and still hope to keep and confirm some groups for July/August with less participants for safety rules”
- **Judit by Norama:** “we are based in Bergamo and it was very hard to work in the worst period also for personal reasons; we are now ready to restart ,depending on safety rules for travels”
- **Lara by Il Diamante/Quality Group:** “we are already working on the Winter products; we think that the high-end travelers will be the first ones to travel again”
- **Stefano by Blueberry Travel:** “we are using our time for internal trainings, to deepen the knowledge of destinations and plan new itineraries; we hope to start again after Summer”
- **Simone by Boscolo:** “we work intensively on training on iconic products and technical issues (ex. CRM, social media); we have launched a consumer campaign based on flexible bookings”



* Source: AIGO survey-march2020

Italy – What happens after the coronavirus?

- **Uncertain economic scenario** due to lack of liquidity, holidays availability, full reopening of companies and businesses, recession foreseen.
- Gradual restart of travels with new safety rules (social distance on airplanes, in museums, restaurants, busses, etc.); **new consumer behavior and security needs may reflect on the price**
- According to ConfCommercio survey, 83% of Italians will spend their holiday in Italy when global health crisis will be over, **17% will travel abroad**
- Clients who got a **voucher** as refund for cancellations may want to use it immediately **to break out of the restriction period**
- Increasing importance of **online contents** and **technology platforms** for socializing, training
- Travel industry looking at **Summer** for restart of travels, **mainly domestic and short haul**
- Possible **stop&go** in business

Italy – Opportunities and trends

- Finland is a **short-haul destination** (just 3hrs from Italy) sparsely populated/crowded. Cozy and pure nature, the happiest country in the world are strong points to capitalize on: now, more than ever it's time to talk about **the Finnish way of life**, the benefits of being in unspoilt nature, doing outdoor activities or simply relaxing.
- Betting on **all-year destination**: make more alternative areas known to the more crowded ones in order to better spread the arrivals
- Opportunity to **gain new visitors**, usually travelling to long haul destinations.
- Luxury tourism: **high-end travelers** are less affected and **will restart travelling easier**, also together with family for breathing fresh air, stay in nature
- **Travel with children**: related to high-end families and to schools holidays
- **Nature lovers**: will be looking for relaxation and open spaces, much missing these days.
- Greater potential for **Lapland marketed as whole region**, putting emphasis also on minor locations for northern lights
- **Travelers never stop dreaming: new, relevant and appealing online contents** by Finnish regions to catch the attention and motivate potential visitors (virtual tours, videos, podcasts..)





Sanna Tuononen

Market representative | France
[Visit Finland](#) | [Business Finland](#)

France – Update on the market

- Lockdown since 17.3. and at least until 11.5.2020
- Flight situation:
 - 2 Finnair flights per day from Paris to Helsinki (March-End of June), 1.7 -> return to normal...?
 - Norwegian – all the flights cancelled until end of May (Paris & Nice)
- Travel bans
 - All the passengers coming to France or passing through French airports need a written declaration for the reason of their travel (just necessary travelling accepted)
 - Travel even inside France is forbidden for the unnecessary travelling
- B2B news
 - Temporary unemployment (or part-time solutions) for Tour operators and agencies
 - SETO's recommendation – cancellation until 29.5. - updated regularly
 - Summer “lost”, maybe “back to business” for the winter season 2020/2021
 - Communication now focusing on dreaming and experiencing the destinations from home, by inspiring customers through books, basic language courses, virtual tours etc.

France – Actions on the market

- Most of the joint promotion campaigns and other marketing campaigns are postponed
- B2C events cancelled (until end of August)
- PR trips and PR events postponed, but communication and relations stay active
- Maintaining communication and good relationship with travel trade partners in France
- Adonet (Association des Offices du Tourisme) meetings and common actions – exchange of ideas and good practices
- Promotional mini-site and Quiz e-learning program for B2B contacts (Miles Attack-platform)
- Ongoing follow up of the Covid situation in France and planning of activities for the “re-launch”
- Planning of 2021 activities in France

France – Greetings and opinions from Travel Trade

- **Scanditours:** "Winter sales started quite well before the worst Corona situation but are now almost paused. **We hope sales could come back in autumn** and that the winter season 2020/2021 would be almost normal...summer is mostly lost..."
- **Worldia:** " Clients are postponing their trips instead of cancelling. They want to **keep planning and dreaming**. For the moment "cancelled" trips are postponed to September. **Finland has a good advantage** of having lots of space and clean nature, important things in the near future for travellers".
- **Comptoir des Pays Scandinaves:** "We are postponing all the trips planned for May, June or July (postponed to 2021 summer). We are monitoring the situation and demand and hope winter season could be ok...**Clients are quite comprehensives and postpone their trips instead of cancelling**"
- **Nord Espaces:** "Situation is very difficult and complicated but we try to **stay positive**. We are selling next winter (there is some demand), but of course the demand is a lot lower than normally at this period. Summer is "over", and we are postponing the reservations"
- **Finnair France:** "Shenghen area will be probably the first "area" to open for travelling (after domestic travelling). Finland is our core market and strong, known products and images for the winter season need to be pushed when the borders open again."

France – Opportunities and trends

- After Corona-virus :
 - Ø First domestic travels (Summer/Autumn 2020), then Europe (Winter 2020/2021) & International (Spring 2021)
 - Ø Younger targets groups travelling first
 - Ø New mentality? Sustainability ? Less travels, more meaning
 - Ø Online visibility and digital solutions

- New target groups

- CSP ++ & Luxury products
- Outdoors & Nature travellers
- Families
- More FITs

- New/changed values

- Search for nature and “back to basic” holidays
- Wellbeing
- Family time more appreciated
- Tailor-made products
- Value for money!
- Security!



Jyrki Oksanen

Market representative | Germany
Visit Finland | Business Finland



Germany – Update on the market

General Information

- Lockdown is over in Germany 20th April, gradual return to normal life
- Schools, shops and services start again 4th May
- Government travel warning until 30th April

Flight & ferry situation:

- Finnair operates 19 flights a week Germany-Helsinki, 1st July onwards recovery plans, normal schedule depending on demand, maybe 2021
- Finnlines will start taking leisure travel passengers 13th May
- Lufthansa restart Frankfurt-Helsinki route
- For airlines damage is big, Easyjet and Ryanair keep selling tickets June-

Big question:

- Quarantine for arriving visitors to Finland 14 days. When is this lifted?

Germany – Greetings and opinions from Travel Trade



Wikinger Reisen, Moritz Mohs – Group travel

- July/August: we hope organize a limited amount of groups to Finland
- Concerns how our suppliers will manage the crisis and be available for our clients
- Demand will change short/ medium term. A return to the volumes of 2019 is expected 2025 on our whole global portfolio. For Finland we estimate to reach 2019 already in 2023.
- Consolidation of the flight market will speed up and we expect higher rates and worse group conditions
- Nature hotels will be our focus reducing accommodation in touristic centers and cities with big capacities.

Feelgood Reisen, Ralf Schröder – Individual travel

- For tour operators this crisis is challenging our existence in Germany. We have refund clients 100 % if the trip is cancelled due to covid-19. This means double work and zero income. State is supporting us with attractive credits, many SMEs are facing many thin years.
- I think our business will only recover 2022, 2021 seems challenging.

Voigt Travel, Cees van den Bosch – Charter operator

- Finland has to stick to the strong elements of its image. Nature, pure, quiet and safe. For this there will be a growing demand. Preserve the quality and image for winter and invest more time, faith, effort and means into summer and other shoulder seasons, like autumn.
- The focus for Finland needs again to be on its traditional and solid European source markets. Build up bilateral relationships.

Germany – Actions on the market

On the agenda this year

- Monitoring the markets on covid and resulting changes in distribution
- New strategy 2021-2023
- Virtual speed dating, themed group meetings
- CRM thematic updates
- Individual fam trips august 2020-
- Workshops September in Frankfurt, Brussels and Amsterdam
- OTA campaigns planned when travel bans are lifted
- Fvw academy online training updated with STF content
- PR activities continue and are increased when situation eases

Q&A

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