

## Overseas impact monitoring

VisitBritain's overseas staff were asked to report on the impact COVID-19 is having on bookings, outbound travel and what the travel trade in market is seeing. Below are the responses received by **09:30 Friday 5 June 2020**.

**Summary**

- On 3 June, Foreign Affairs Minister Heiko Maas announced that the German Government will lift the global travel warning for German citizens for 31 European countries from 15 June.
- Germany continues to advise against travel to countries which have quarantine measures in place (including the UK).
- TUI Germany has increased the commission for travel agencies to 12% for every new booking in the month of July (as an incentive for additional bookings and as a support for their distribution partners).
- A number of airlines globally are opening up more routes. From June there will be additional flights into the UK from Brazil, Denmark, France, Italy, Norway and the USA.
- Spain's Im Group (Rumbo.es and Lasminute.es) have said – "We are starting to see some good results". "After a 95% drop in bookings in April, we are now starting to see good results in bookings in markets such as Spain, France, Italy, Germany and the United Kingdom, clearly exposing that, despite the recent experience, there still maintains that desire to enjoy vacations abroad," said Corradino
- A survey by Infratest Dimap on behalf of ARD in Germany shows 50% of German citizens have no travel plans for the summer. Another 31% want to spend their holidays in Germany and 19% in other European countries.
- A survey shared on 27 May found nearly three quarters of Canadians say they will be nervous about flying until a vaccine is developed for COVID-19.
- A survey carried out by the Brazilian Tour Operator Association (BRAZTOA) shows that 70% of Brazilians want to travel this year. In 2020 the majority of respondents state they want to travel with in Brazil, but in 2021 50% of respondents wanting to travel internationally.

Market	Feedback
Australia	<ul style="list-style-type: none"> <li>- Qantas is boosting domestic flights by 40%</li> <li>- Media coverage in "Traveller" of top ten places to go in 2021, does not include the UK.</li> <li>- Media coverage of Britain at the moment contains criticism of the UK's quarantine plan.</li> </ul>
Brazil	<ul style="list-style-type: none"> <li>- Brazil has again extended its restrictions of the entrance of tourists without residence permits until 22 June.</li> <li>- Latam Brazil will restart its flights between São Paulo and London (LHR) on 16 June 2020</li> <li>- British Airways is restarting daily flights between São Paulo and London (LHR) on 16 June 2020. Flights between Rio de Janeiro and London (LHR) are to recommence on 1 July 2020 six times per week.</li> <li>- A survey carried out by the Brazilian Tour Operator Association (BRAZTOA), in partnership with the University of Brasília (UNB) and Amplia Mundo states:               <ul style="list-style-type: none"> <li>o 70% of Brazilians want to travel this year.</li> <li>o 78% of Brazilian travellers feel frustrated if they do not receive all the information necessary to feel safe and 69% feel uncomfortable with unexpected events.</li> <li>o 56% of respondents believe there is a high probability of becoming infected when traveling in 2020. On the other hand, 70% of Brazilians intend to travel later this year.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ In 2020 there is a predominance of travel intentions to national destinations (60%), with the Northeast (21.8%) and Southeast (19.8%) regions in the lead. Regarding international destinations, Europe (15%) and North America (10%) stand out.</li> <li>○ However, in 2021 the intention to travel to international destinations is greater (51%), with Europe (21.6%) and North America (14.4%) leading. With regard to the profile of travellers, more than 80% of them want flexibility and freedom in their travels, with the majority preferring to travel to tourist areas</li> </ul>
Canada	<ul style="list-style-type: none"> <li>- A survey shared on 27 May found nearly three quarters of Canadians say they will be nervous about flying until a vaccine is developed for COVID-19. The poll of 1,001 Canadians aged 18 years and older was conducted by Nanos Research from 17-19 May.           <ul style="list-style-type: none"> <li>○ The most worried are 55-plus Canadians, 84% of whom agreed or somewhat agreed that they would be worried to fly without a vaccine, compared to 65% or those aged 18 to 54.</li> <li>○ Nearly one in four (24%) of overall survey respondents said they would not worry. Regionally, those from Ontario and British Columbia are most concerned.</li> </ul> </li> </ul>
Denmark	<ul style="list-style-type: none"> <li>- On 6 June, BA will resume direct flights between Copenhagen and LHR.</li> <li>- Scandinavian Airlines (SAS) is evaluating options for the Copenhagen to London route. No plans to resume yet. SAS will provide two weeks' notice ahead of its resumption of direct flights. From 30 June, it will double its current capacity, resuming a number of direct routes including from Copenhagen to Stavanger, which will link to Aberdeen</li> <li>- Ryan Air flights from Aarhus are currently available to book from 4 July to London Stansted.</li> <li>- Gislev Rejser, one of the larger tour operators in Denmark with a wide range of Britain product is currently offering information and advice to customers. Danish borders remain closed until 31 August and they are planning to carefully open up for advertising next month. Customers are currently rebooking trips to countries they are allowed to enter such as Norway, Germany and Denmark. Gislev is hoping to be able to carry out their sold out September and October groups to the UK.</li> </ul>
France	<ul style="list-style-type: none"> <li>- On social media, the team is starting to get questions from consumers re Summer plans e.g.: is it ok to travel or not? Will places be open or not?</li> <li>- Orly airport is gradually reopening from 26 June, Terminal 3 will open first. Terminal 3 hosts Air France, British Airways, Transavia amongst other companies. Increased health and safety and social distancing measures will be put in place, in addition to thermal cameras to check passengers' temperature.</li> <li>- Some positive figures showing the beginning of tourism recovery:           <ul style="list-style-type: none"> <li>○ Europe recovery: Association of travel companies is seeing 20% of usual bookings on Europe</li> <li>○ 50% of travel agencies are now open</li> <li>○ 72% of tourism think-tank members anticipate recovery for the second semester</li> <li>○ +15% reservations last week vs last year on OTA MisterFly</li> <li>○ 3 times more camping reservations since last week and the easing of lock-down; campsites anticipate near-normal occupancy for July-August</li> </ul> </li> </ul>
Germany	<ul style="list-style-type: none"> <li>- On 3 June, Foreign Affairs Minister Heiko Maas announced that the German Government will lift the global travel warning for German citizens for 31 European countries from 15 June.</li> <li>- Initially this will exclude Spain and Norway as entry restrictions for German citizens are currently still in place for both countries. For these European countries the German Foreign Office will be providing country-specific advice updated daily.</li> <li>- Germany continues to advise against travel to countries which have quarantine measures in place (including the UK).</li> </ul>

	<ul style="list-style-type: none"> <li>- A survey by Infratest Dimap on behalf of ARD (Germany's National TV broadcaster) shows:           <ul style="list-style-type: none"> <li>o 50% of German citizens have no travel plans for the summer.</li> <li>o 31% want to spend their holidays in Germany and 19% in other European countries.</li> <li>o 84% of people say that they already know if and where they are going on holiday this summer. Only 15% are still uncertain.</li> </ul> </li> <li>- TUI Germany has increased the commission for travel agencies to 12% for every new booking for the month of July (as an incentive for additional bookings and as a support for their distribution partners).</li> <li>- TUI Germany has announced details of its summer holidays relaunch planning initially for Spain, Greece, Portugal and Cyprus.</li> <li>- EasyJet has announced that they will be resuming operations in Germany from 1 July 2020 and are planning to fly to 50% of their pre-crisis destinations by the end of July and 75% at the end of August. Flights to regional British airports from Germany will start in August or September.</li> <li>- With the global travel warning being lifted from 15 June 2020 and several neighbouring countries opening their borders to Germans for holiday visits a summer holiday abroad is now becoming increasingly realistic for Germans again. Due to the reduced number of flights and flight capacity and general nervousness destinations that can be reached by car are likely to have an advantage this summer.</li> </ul>
GCC	<ul style="list-style-type: none"> <li>- Increasingly negative consumer sentiment on social media around UK Government's decisions.</li> <li>- There was also coverage of 3 Saudi nationals who contracted COVID-19 after travelling to Britain.</li> </ul>
Italy	<ul style="list-style-type: none"> <li>- 7 million Italians are likely to go on holiday in Italy in June.</li> <li>- Vueling restarts 19 routes from Italy during June. London-Gatwick features in the list of 10 direct routes.</li> <li>- EasyJet has launched a promotion to celebrate the return of international connections. Book to travel between July and October 2020, prices start at €14.99 pp from Malpensa to destinations including London-Luton.</li> <li>- Alitalia and Blue Air have announced a gradual reopening of scheduled flights but not featuring any British destinations.</li> <li>- Wizz Air announced its 29<sup>th</sup> base in Milan. The airline will base 5 Airbus A321s in Milan in July 2020. The aircraft will support the operation of 20 new routes for London Luton and other European destinations.</li> </ul>
Netherlands	<ul style="list-style-type: none"> <li>- Press conference held on Wednesday 3 June: Prime Minister Mark Rutte and Minister De Jonge told on television about the summer holidays 2020 and COVID-19. Detailing that as of 15 June, travel advisories for several European countries will be changed from orange to yellow. The change means the health risk of these countries is comparable to that in the Netherlands and that these countries are happy to receive Dutch tourists.</li> <li>- Travel advisories will remain orange for the United Kingdom (because the risk to health is considered to be greater there).</li> </ul>
Norway	<ul style="list-style-type: none"> <li>- According to four tour operators, countries that have experienced a large number of COVID-19 cases and deaths are seen as less safe to visit. Among these the UK and Sweden were mentioned.</li> <li>- The majority of sold UK groups have been re-booked for 2021. There are still groups confirmed for late autumn but these are also expected to be moved to next year.</li> </ul>

	<ul style="list-style-type: none"> <li>- Operators are currently focussing on marketing Norway to Norwegians. There is generally no demand for international travel at the moment.</li> <li>- SAS is looking into the possibility of opening up OSL/LHR once travel bans are lifted. All depending on implications of the quarantine rules etc.</li> <li>- The Ministry of Foreign Affairs' travel advice is extended until 20 August.</li> </ul>
Russia	<ul style="list-style-type: none"> <li>- Prime Minister Mishustin recommended that Russians should not plan summer holidays abroad this year and holiday in Russia instead.</li> <li>- Information from luxury operators is that some affluent families are looking into booking villas and using private charter flights.</li> </ul>
Spain	<ul style="list-style-type: none"> <li>- Some physical travel agencies are re-opening slowly in June according to the de-escalation plan, but only around a 20-30%.</li> <li>- Airlines have been opening up routes to Spain following the Prime Minister's announcement that Spain will be open for tourism from July. Condor will fly from 8 airports in Germany; and the following airlines will fly to Spain from multiple European destinations: Ryanair; Iberia Airlines; Vueling; Jet2.com.</li> <li>- Spain's Im Group (Rumbo.es and Lasminute.es) have said – "We are starting to see some good results". "After a 95% drop in bookings in April, we are now starting to see good results in bookings in markets such as Spain, France, Italy, Germany and the United Kingdom, clearly exposing that, despite the recent experience, there still maintains that desire to enjoy vacations abroad, "said Corradino</li> </ul>
Sweden	<ul style="list-style-type: none"> <li>- Many tour operators still have a large number of groups confirmed for August through October. Both operators and clients are keen for these to go ahead, the quarantine rules put them at risk. Customer sentiment for certain travel categories (Outdoor, cycling/hiking, garden tours etc) is still positive for the UK.</li> <li>- Both London Heathrow and Stockholm/Arlanda are classed as high-risk airports by EASA. SAS, together with the airports, are lobbying the warning to be down-graded from high risk.</li> <li>- Garden operator, Rosebud's Tours, has a group trip to the UK in September which isn't cancelled and planned to go ahead depending on quarantine and air traffic.</li> </ul>
USA	<ul style="list-style-type: none"> <li>- New York City is set to enter phase one of reopening on 8 June. Every state in the US has begun gradually reopening on a regional or local basis.</li> <li>- American Airlines announced it will start to <a href="#">inform passengers when flights are getting full</a> and will give them options to switch flights.</li> <li>- Frontier Airlines has implemented mandatory temperature checks for passengers.</li> <li>- The US will ban the arrival of <a href="#">Chinese passenger flights</a> from 15 June.</li> <li>- <b>General capacity update:</b> <ul style="list-style-type: none"> <li>o <b>BA:</b> 6 live routes with reduced capacity, Portland to Heathrow service to resume 2<sup>nd</sup> Sept</li> <li>o <b>Virgin:</b> no passenger flights in June, LA and New York JFK to Heathrow to resume July 1<sup>st</sup> with rest of passenger service to be resumed as early as 13<sup>th</sup> July</li> <li>o <b>American Airlines:</b> daily flights on 4 routes set to resume 4<sup>th</sup> June with additional resumptions in July</li> <li>o <b>United Airlines:</b> 2 live routes with reduced capacity, majority of resumptions from 24<sup>th</sup> Oct, Washington/San Fran to Heathrow set to resume in July/August</li> <li>o <b>Delta:</b> 2 live route from Detroit/Atlanta to Heathrow, 4 routes set to resume on 1<sup>st</sup> August</li> </ul> </li> </ul>