

Visit Norway Italy

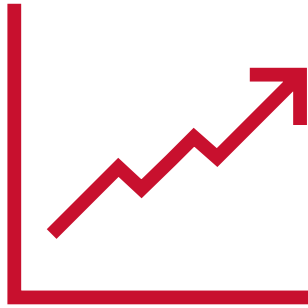
19th April 2023

Marco Bertolini – Travel Trade Manager Italy

 Norway

Facts & Figures

Key Figures Italy



Inflation rate

7,7 %

(March 2023)



Unemployment rate

8,0 %

(February 2023)



GDP forecast 2023

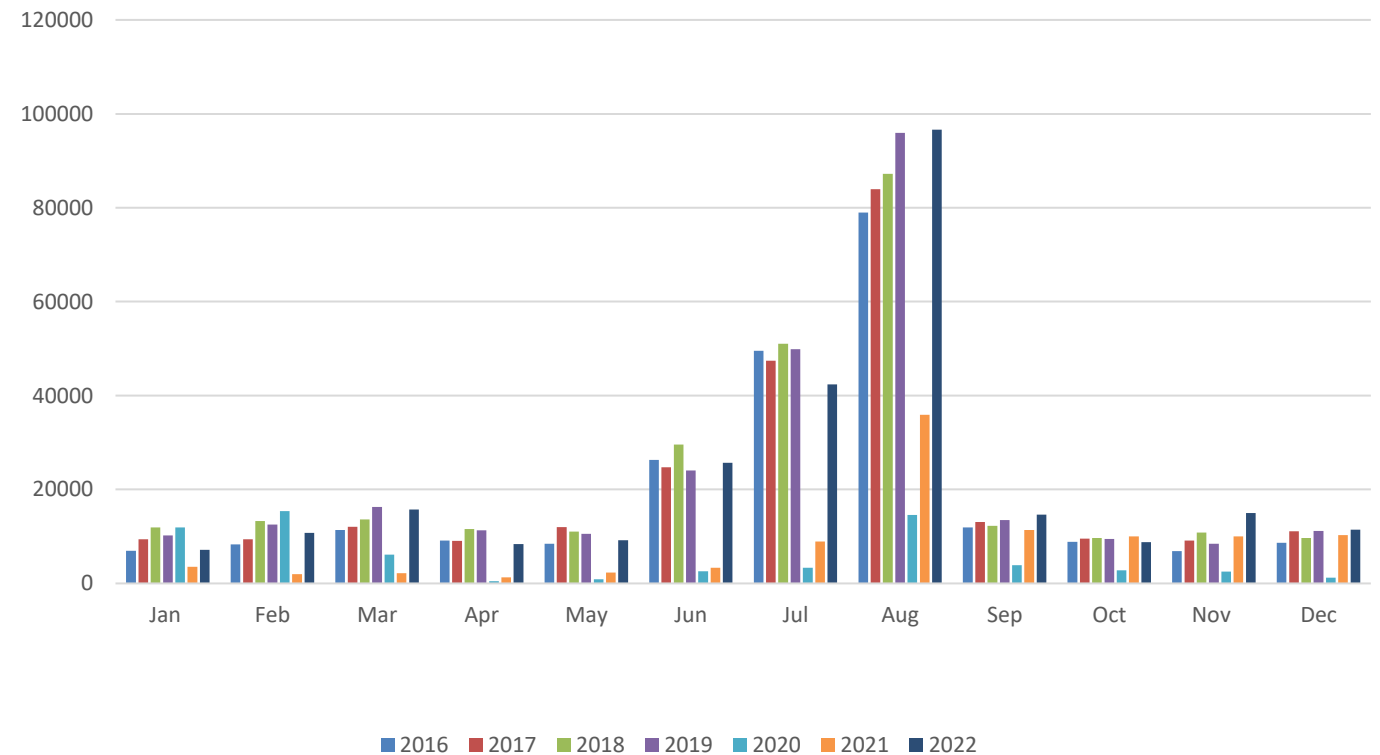
+1,4%

(March 2023)

Italian Guest Nights in Norway 2016 - 2022

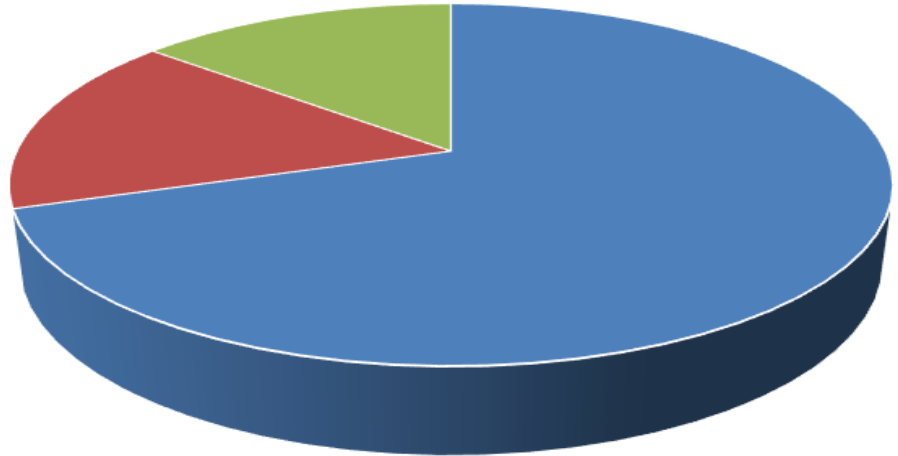
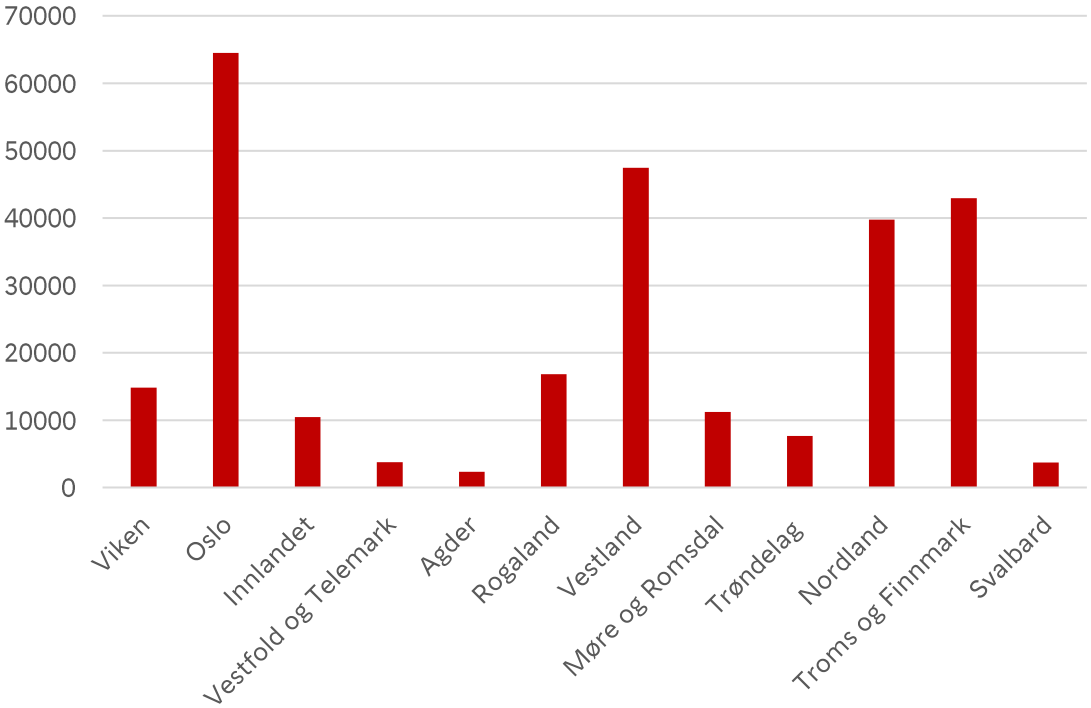
- The bulk of the traffic from Italy takes place in the summer season, **62%** of all overnight guests are concentrated in the period from June to August.
- However, we see a tendency to travel off season. More and more Italians are traveling to Norway to experience winter, and especially the northern light safaris have become increasingly popular.
- The most attractive destinations are **Fjord Norway, Northern Norway, and Oslo.**
- Guest nights for Italians in Norway in 2022 were at **97% of 2019 levels**, which means it was almost back to pre covid-19 levels (considered one of the best year ever) with 4 months over 2019 figures (Jun, Aug, Sep, Nov, Dec).

Italian guest nights in Norway 2016-2022



Italian Guest Nights in Norway 2022 by County

Type of Accommodation 2022



■ Hotel ■ Camping ■ Cabins & Youth Hostels

News from the Market

The latest news from the specialists

- **Winter** sales went well for Norway and the Nordics in general.
- **Summer** sales seem to be good for most of them so far. Ups and downs in the bookings.
- FIT good.
- Small groups.
- **Fjords** seem to have a very good appeal and an increase in requests from clients.
Northern Norway: Lofoten always on top of the requested destinations
North Cape not the same appeal as in the past.





Photo by Saad Butt / VisitNorway.com

The latest news from the specialists

- Iceland is definitely our biggest competitor
Finland ok but mostly for winter.
Sweden and Denmark are not so trendy
- More qualified requests.
In some cases, less requests but ending in good sales.
- **Issues:**
 - More and more difficult to handle groups (problems with hotel rooms mainly in cities)
 - No quick answers from the suppliers, if any.
 - Flights very expensive

The network after Covid

- In Italy there are **6483** agencies with a regular license:
 - **643** tour operators
 - **240** incoming tour operators
 - **5600** travel agencies (retailers)
- Geographical distribution:
 - Northern Italy **50%**
 - Central Italy **20%**
 - Southern Italy **20%**
 - Sardinia and Sicily **10%**
- The effects of Covid:
 - since 2021 **1357** companies **closed**
 - **991 in 2021**
 - **366 in 2022**following more or less the same pattern of the geographical distribution



Advance booking is back

- After some years of last minute the **advance booking** seems to be back
- Price increase didn't discourage travelling during Easter holidays
- **Good trend** for sales through the agency network
- April 2023 one of the best ever (even before pandemic)





Photo by Trolltunga Active

Advance booking is back

- Top destinations for Easter and spring:
 - Egypt and Indian Ocean
 - City Breaks in Europe and...
 - **Iceland and Norway.**
- Rediscovery of travelling as a value
- **New needs** from the clients:
 - explore** the destination
 - nature** related experiences
 - get in touch with **local communities**

Easter in Travel Agencies

- **Very good sales for Easter**, following the good trend of the previous months (despite prices increase)
Unexpected also for TOs and TAs
- Travel Agencies are selling **more trips abroad**: **+11%** (compared to 2022)
- On top European capitals
- Short haul: Spain, France, Portugal...
- Medium haul: Egypt, Israel but also **the Nordics** (Iceland, Finland, Norway)
- Long haul: Caribbean, Usa, Japan, Thailand
- This trend is higher in North-west and centre Italy.



More on sustainability

- Travellers are keener on spending more if the trip is sustainable
- A change in the mindset:
 - **64%** of Italian travellers are influenced by environment and sustainability when planning a trip (**71%** among under 35)
- Most of the Italians seem willing to pay from **10 to 20%** more for services and to operators working in a sustainable way
- Many travellers wish for a **portal** dedicated to sustainable travels.



News from the Market in pills:

- **More flights:**
- **Norwegian will have direct flights in high-season from Rome – Oslo and Bergen, Milan – Oslo and Bergen. Pisa, Napoli, Catania and Venice – Oslo 3 times a week. Sardinia, Bari-Palese, Bologna and Verona – Oslo twice a week.**
- **SAS will have direct flights in high-season from Rome – Oslo, Milan – Oslo, and once a week Milan – Bergen and Stavanger. Palermo and Venice – Oslo twice a week.**
- **63% of Italians evaluate visiting new places** when choosing a destination. (marco-institut.de)
- For summer 2022 the Italians budgeted € 1.607 to spend on holiday. One out five Italians planned a holiday this winter (2023). (allianz-partners.com)
- **Expected expenditure in 2023 of € 1.900.** The payment form Buy Now Pay Later, will support the spending capacity. (compass.it)
- **28% of Italians turn to travel agencies**, seniors more accustomed to doing so. (compass.it)
- **67% of bookings come from OTAs.** (blastness.com)

News from the market in pills:

- **The number of cruise passengers is rising.** *Crociéristime* estimates there will be 1 000 000 Italian cruise passengers in 2023. In 2022 there were 900 000 Italian cruise passengers (close to 2019 levels), where 7-day cruises in summer are the most popular. Increasingly popular with younger people, 7 out of 10 passengers are under 50 years old. ([crociéristime.it](https://www.crociéristime.it))
- Tourism in 2022 benefitted from longer stays and higher spending by tourists eager to travel everywhere. In 2023 tourists may be more **cautious about spending** due to inflation and have shorter and closer trips that contain transport costs. ([unwto-ap.org](https://www.unwto.org))
- Research indicates **culture** as one of the main drivers of the global tourism industry. Estimates that the sector will reach 12 billion dollars in revenue by 2028. ([cittaidentitarie.it](https://www.cittaidentitarie.it)) ([globeNewswire.com](https://www.globeNewswire.com))

Activities in the Italian Market 2023

NTW 2023 Oslo

- Adventure Overland
- Alidays Travel Experiences (**NEW**)
- Alpitour
- Antarctica Travel Company
- Blueberry Travel Company
- Boscolo Tours
- Cosmos – Globus Family of Brands
- Easyweeks Tour Operator
- Giver Viaggi e Crociere
- Go Europa
- Il Diamante Tour Operator (**cancelled**)
- International Tours Caldana
- Le Vie del Nord
- Naar Tour Operator (**NEW**)
- Norama Tour Operator Luxe & Adventure Travels
- Nordic Light Travel by Ambrosiana Viaggi
- Terre Polari Viaggi
- The Wilderness Society
- TUI Musement
- Viaggigiovani.it
- WeRoad (**cancelled**)



Travel Trade Italy 2023

- **Nordic Workshop 2023 (23/3/23):**
Physical
45 Nordic suppliers (15 Norwegians)
82 Italian buyers (from 66 companies)
Very good evaluation on both sides!
- Close dialog with the Italian tour operators and carriers. Regular info about the situation in Norway and about Norwegian travel industry.
- Participation at **TTG**; the most important trade fair in Italy **11-13 October 2023**.
- TO – mapping.

