

Market Update. As of 22 May 2020.



Central Europe Middle East.

Current situation.

- Germany:
 - Border between Germany and Switzerland open June 15th.
 - Germany's biggest tour operator TUI announced to cut 8'000 jobs, even though receiving massive federal support
 - The German tourism industry asks the government for a national tourism summit to get further financial help.
- Poland
 - Steady increase of 300-500 cases every day, no signs of a slowdown yet.
 - Polish government announced lifting of some restrictions. Hair salons, restaurants, leisure and sports institutions will be allowed to open under strict rules. Schools will stay closed until the summer vacation.
 - Border controls will continue until mid-June, then opening very likely.

Central Europe Middle East. Current situation.

- CZ
 - Discussions about opening borders for tourists with following countries: Austria, Slovakia (probably opening on 8.6.), Slovenia, Croatia, Greece, Tunisia, Egypt, Italy, Canary Islands, Turkey, Hungary, and Germany.
 - 4th phase of relaxing restrictions planned on 25 May (almost back to normality).
- Russia
 - World's second-highest number of infections.
 - Moscow and St. Petersburg extended lockdown until May 31. Face masks and gloves mandatory in public. Big construction businesses allowed to work.
 - Citizens are being advised to plan the summer holidays inside Russia.

Central Europe Middle East.

Current situation.

- Nordics
 - Sweden's Foreign Ministry extended recommendation to avoid non-essential overseas trips until July 15th, Norway until August 20th.
 - Borders to Denmark remain closed to foreign visitors but slow re-opening inside the country
 - SWISS plans to re-service Copenhagen and Göteborg and increase Stockholm capacity from June 08 on. Finnair services Zürich 3x a week already.
- Austria
 - All shops re-opened again. Restaurants open as of May 15, hotels as of May 29. “Austrians stay in Austria!”-campaign planned. Re-opening of border with Germany and Switzerland on June 15.

Central Europe Middle East.

Current situation.

- GCC
 - Infection numbers still growing. Qatar reported record figures. But, in most GCC countries restaurants, hotels are operating again.
 - Public beaches closed, private beaches open if you stay in the hotel overnight.
 - People can't leave home at night, wearing masks all the time outside of their home.
 - Schools are closed until September 2020.
 - Emirates resumes flights to 9 destinations (e.g. LHR, CDG, FRA) by May 22. Travelling in both directions only possible with special permission given by the Ministry of Foreign Affairs of the UAE. Other destinations shall follow.
 - Low oil price is a huge economic problem in Arab countries. Big lay-offs, financial problems within state budgets. KSA announced VAT increase from 5 to 15%, effective July 1st 2020.

Europe West.

Current situation.

- France
 - French government launching massive support plan for tourism sector, total 18 billion euros.
 - French residents can start to book their holidays in France and ask tourism providers to guarantee full refund if necessary.
 - Borders with Switzerland are planned to reopen on June 15th. The French are mostly expected to stay in their country this summer, but the border opening could generate last-minute travel to Switzerland.

Europe West.

Current situation.

- Italy
 - Italy grants a total of 55 billion in state aid. Approx. 10% will sustain the tourism sector. 20 million will be used by ENIT to promote vacations in Italy with a campaign "Viaggio Italia".
 - Families with yearly incomes below 40K EUR will receive a max 500EUR bonus for holidays in Italy to be booked through a travel agency or tour operator.
 - As from 3 June onwards, Italians will again be allowed to travel nationwide. Opening borders with CH and other EU countries announced but not yet approved
 - The infections number in Italy are constantly decreasing but remain at a relatively high level in Lombardy. This leads to internal political tensions as holiday regions in the south do not want to receive tourists from the more affected regions in the north.

Europe West.

Current situation.

- Spain
 - Until June 15 restriction on non-essential travel to and from countries in the European Union and Schengen associated countries remain. In addition, a 14-day self-quarantine was announced until the end of the state of emergency by May 24 with a probable extension until the end of June
 - Madrid and Barcelona will remain in Phase 0 as of Monday 18, the rest of Spain is either already in Phase 1, or will move to this stage

Europe West.

Current situation.

- UK
 - “Stay home” was replaced with “stay alert” message. Public transportation increasing frequencies; however, travelers are advised to walk/bike or drive if possible, and avoid rush hour
 - UK furlough scheme has been extended until October; the 25% of the UK workforce who are currently paid 80% of their salary (up to a maximum amount) via this scheme will continue to get paid involuntary leave. Many in the travel and hospitality industry are participating in this program, including STC UK.
 - SWISS and other airlines plan to restart/increase flights from the UK to Switzerland in June, despite a continued global travel advisory and the expected introduction of a two-week self-isolation to be introduced for everyone arriving in the UK also in June. Details including exceptions are not yet known.

Europe West.

Current situation.

- Benelux
 - NL: With the opening of the borders between Germany and Switzerland planned for 15 June, the access and travel for Dutch guests will also be possible again. No strict travel restrictions are in place between the Netherlands and Germany and the actual recommendation not to travel might therefore be suspended soon.
 - BE: Belgium will initiate Phase 2 of the exit plan from 18 May. Schools, shops and museums will reopen. All cultural, sports, tourism and recreational events remain prohibited until 30 June. Cancellation of mass events until 31 August. General travel ban in Belgium till June 8.



Switzerland.

Americas.

Current situation.

- US
 - According to the Congressional Budget Office (CBO), the coronavirus pandemic could wipe out 40% of the US economy, quadruple the federal deficit to \$3.7 trillion and push national debt to nearly \$27 trillion.
 - No change in travel restrictions.
- Canada:
 - First provinces (Alberta, Quebec, Ontario) announcing plans to reopen the economy in the next couple of weeks. Ontario, first measures to ease the lockdown May 25, 2020
- Brazil:
 - Growing figures of infected people in all states. Several states analyzing a complete lockdown. Growing political instability.

Asia-Pacific. Current situation.

- China
 - First evaluation of "Chinese May Golden Week": 115 Mio Trips (2019: 195 Mio), with a total revenue of 6,74 Bill USD, only domestic traveling, and a clear trend to avoid public transportation (flights, trains, etc.) in favor of private transportation (car, car rental).
 - Greece and Georgia widely communicated as first countries the relaunch of international incoming tourism as of July 1, Finnair plans to relaunch flights to HKG per Jul 2. Germany plans first expatriate return flights to China end of May.
- SEA
 - Decrease all over SEA. Thailand, Vietnam, Malaysia opening up. Singapore, Indonesia and Philippines remain with lockdown restrictions, planned opening step by step. In Singapore, everything should be back to normal by June 1, except international travel. For Philippines and Indonesia, no clear date is set.

Asia-Pacific.

Current situation.

- Australia
 - Reopening in 3 stages, back to normal (except intl. travel) by mid July. Currently gatherings of 20 pax allowed, gyms, cinemas, galleries, beauty therapists, caravan parks and camping grounds reopening, some interstate travel.
 - The "Travel Bubble AU - NZ" is confirmed, and dates will be released soon, probably by end June. But further international travel is not likely to recover any time soon.
- India
 - Lockdown held until May 31. Government expected to lift hard lockdown very soon. Public transportation partly relaunched by May 31, ground before flights. International flights are not yet announced.
 - Big economic package by the government, priority 1 is agriculture, while support for the tourism industry has not yet been announced.

Asia-Pacific.

Current situation.

- Korea
 - Korea has lifted restrictions on May 6, returned to "everyday life quarantine", mask wearing is now mandatory. School opening announced, starting this week with high school, while primary / secondary levels follow early June.
 - Air traffic: Korean Air currently 13 international destination, 32 destinations by beginning June, incl. FRA, PAR, AMS, LON
- Japan
 - Improvement, government considers to lift the state of emergency by the end of this week, as well for Tokyo and Osaka. Government recommends "new lifestyle" guidelines, but the rules are not imposed. Economic recession is now reality. Travel behavior during the Golden Week holidays has been positively assessed, as people seemingly respected the recommendations, and only 10% of people have been travelling.

Watchlist.

Current situation.

- Iran:
 - Businesses back to work. Strong interest from clients. Travel trade: “book now – travel later”
- Israel:
 - LH starts flights on June 1, clients are booking with tour operators, border and quarantine situation not clear yet
- Ukraine:
 - Lockdown until 22 May, flight situation not yet clear

Watchlist.

Current situation.

- Turkey:
 - Lockdown until after Ramadan (end of May)
 - Turkish Airline flights resume partly as of May 20
 - Mandatory 14 days quarantine for incoming passengers
- Central Asia:
 - Partial ease of lockdown
 - Strong promotion of domestic tourism
- Argentina:
 - Borders are closed. Nobody can enter or leave Argentina.
 - The country has banned all commercial flight sales through 1 September 2020



SWISS: Ramping up operation.



A329 über Vierwaldstättersee.



Flight plan June 2020.

- Gradual expansion, 190 flights per week to 41 European destinations by the end of June from Geneva and Zurich
- Intercontinental services will also be expanded again from June with direct connections from Zurich:
 - New York JFK (4/W), Chicago (2/W), Newark (3/W), Singapore (1/W), Bangkok (1/W), Tokyo (2/W), Mumbai (3/W), Hong Kong (2/W), Johannesburg (1/W) weekly).
- Further expansion over the summer months is planned.
- All details available on [swiss.com](https://www.swiss.com)

Flight schedule Europe from Zürich and Genf.



ZRH												GVA									
	Frq	Week	1st	2nd	3rd	4th	Frq	Week	1st	2nd	3rd	4th		Frq	Week	1st	2nd	3rd	4th		
P2P	ZRH	AGP	4	4	4	4	ZRH	DUB	2	2	4	4	ZRH	MAN				2	2		
EU-EU	ZRH	AMS	4	4	6	6	ZRH	DUS	4	4	4	4	ZRH	MUC	6	6	6	6			
	ZRH	ARN	4	4	5	5	ZRH	FCO			4	4	ZRH	NAP			3	3			
	ZRH	ATH	5	5	5	5	ZRH	FLR			2	2	ZRH	NCE	2	2	4	4			
	ZRH	BCN	4	4	6	6	ZRH	GOT	2	2	2	2	ZRH	OPO	5	5	5	5			
	ZRH	BDS			2	2	ZRH	GWT	1	1	1	1	ZRH	OTP	4	4	4	4			
	ZRH	BEG	4	4	4	4	ZRH	HAM	4	4	6	6	ZRH	PMI	3	3	5	5			
	ZRH	BRU	2	2	4	4	ZRH	KBP			1	1	ZRH	PMO			2	2			
	ZRH	BUD	2	2	4	4	ZRH	LED			1	1	ZRH	PRG	4	4	4	4			
	ZRH	CDG	2	2	2	2	ZRH	LHR	5	7	11	11	ZRH	SKG				1			
	ZRH	CPH	4	4	5	5	ZRH	LIS	4	4	4	4	ZRH	TXL	5	7	11	11			
	ZRH	DME	2	2	2	2	ZRH	MAD	3	3	3	3	ZRH	VIE	6	6	6	6			
														ZRH	VLC	4	4	4	4		
														ZRH Total			101	105	148	149	
															GVA Total		7	7	44	44	



Switzerland.