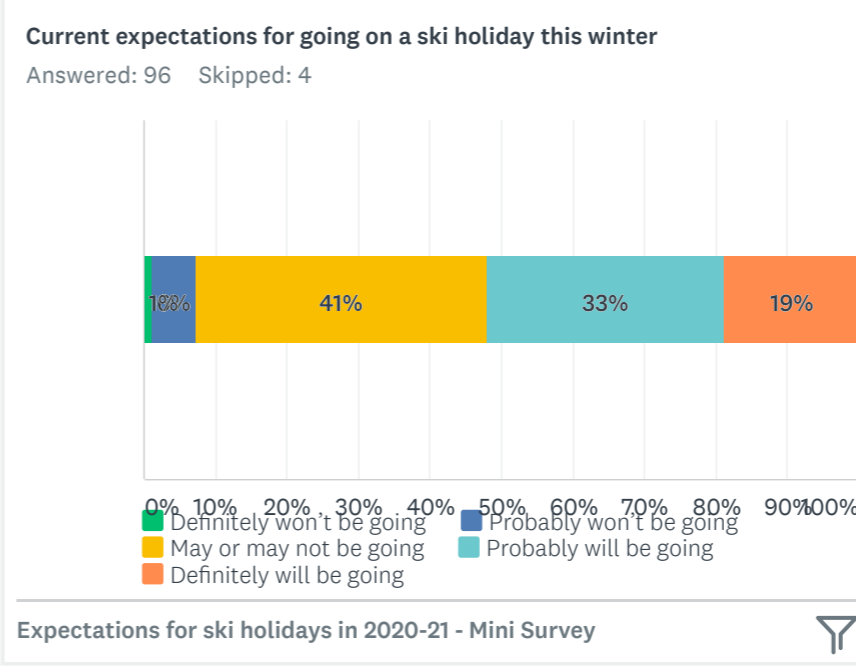
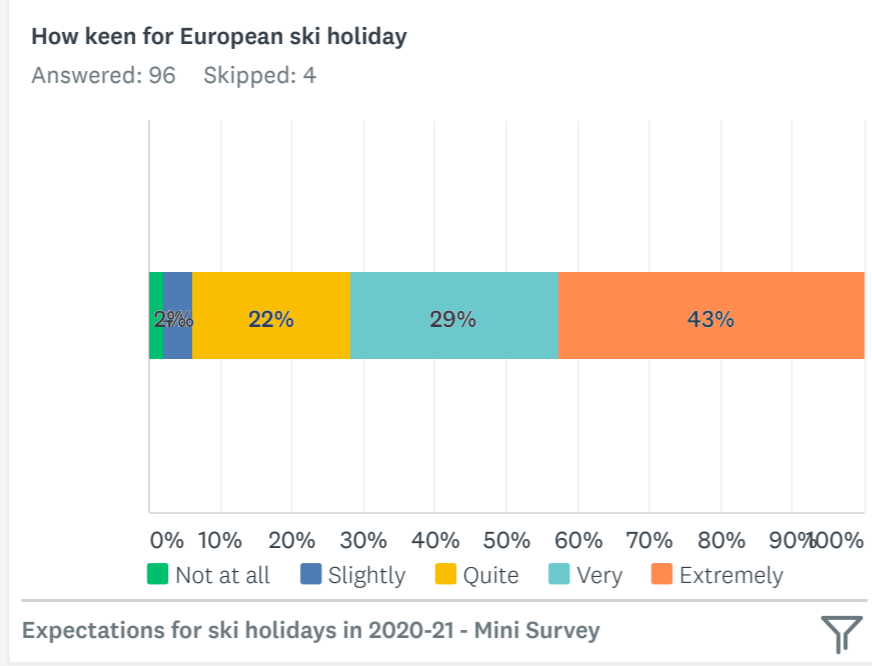


Survey ran from 25 May to 4 June 2020 and conducted among people that have made enquires or shown interest in ski holidays to Jasna, Slovakia (n=100).

Majority of ski holiday makers still wanting and expecting a European Ski Holiday next winter...

Demand among regular European ski holiday makers for this coming winter remains healthy 72% very or extremely keen

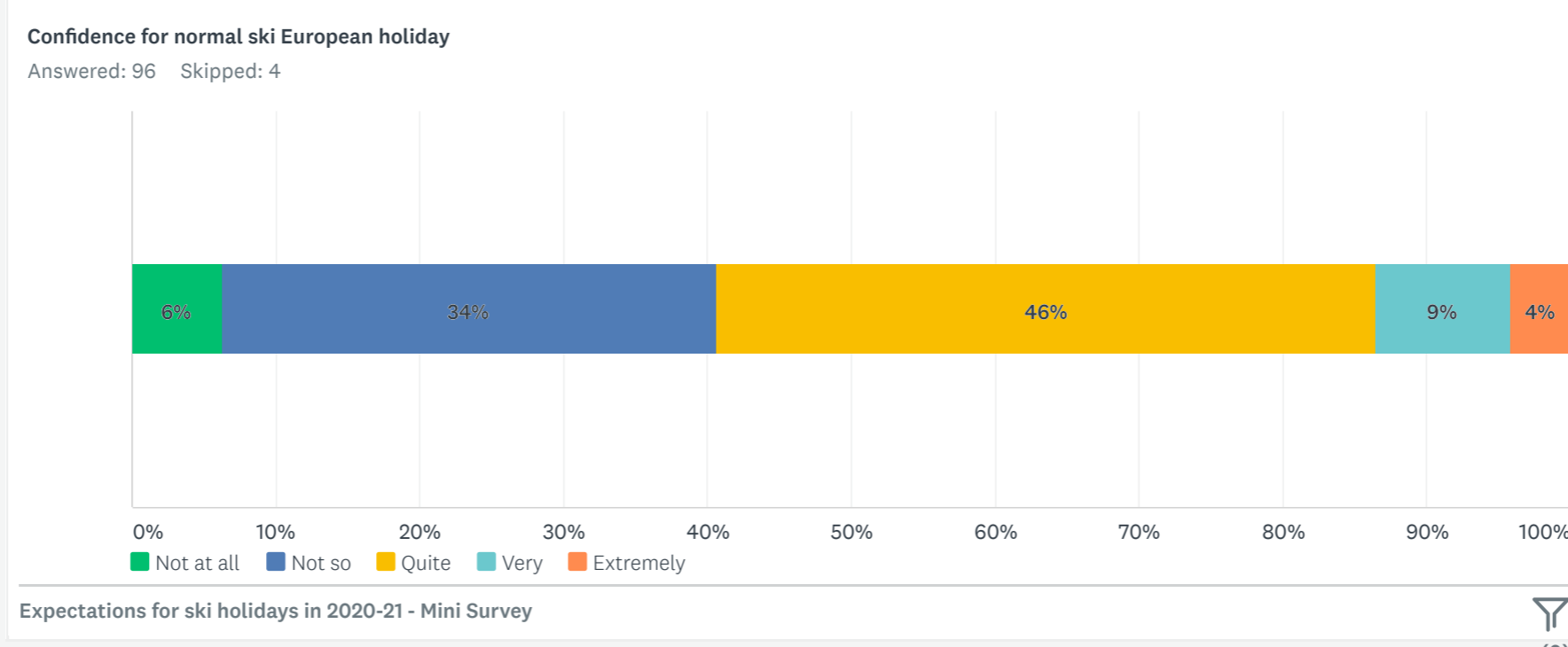
Just over half say they are expecting (52% definitely/probably) to go on a ski holiday, with a further 41% still undecided. Very few people have written off a ski holiday for this coming winter.



But confidence for a normal ski holiday is low...

Just 13% are extremely/very confident for a normal ski holiday.

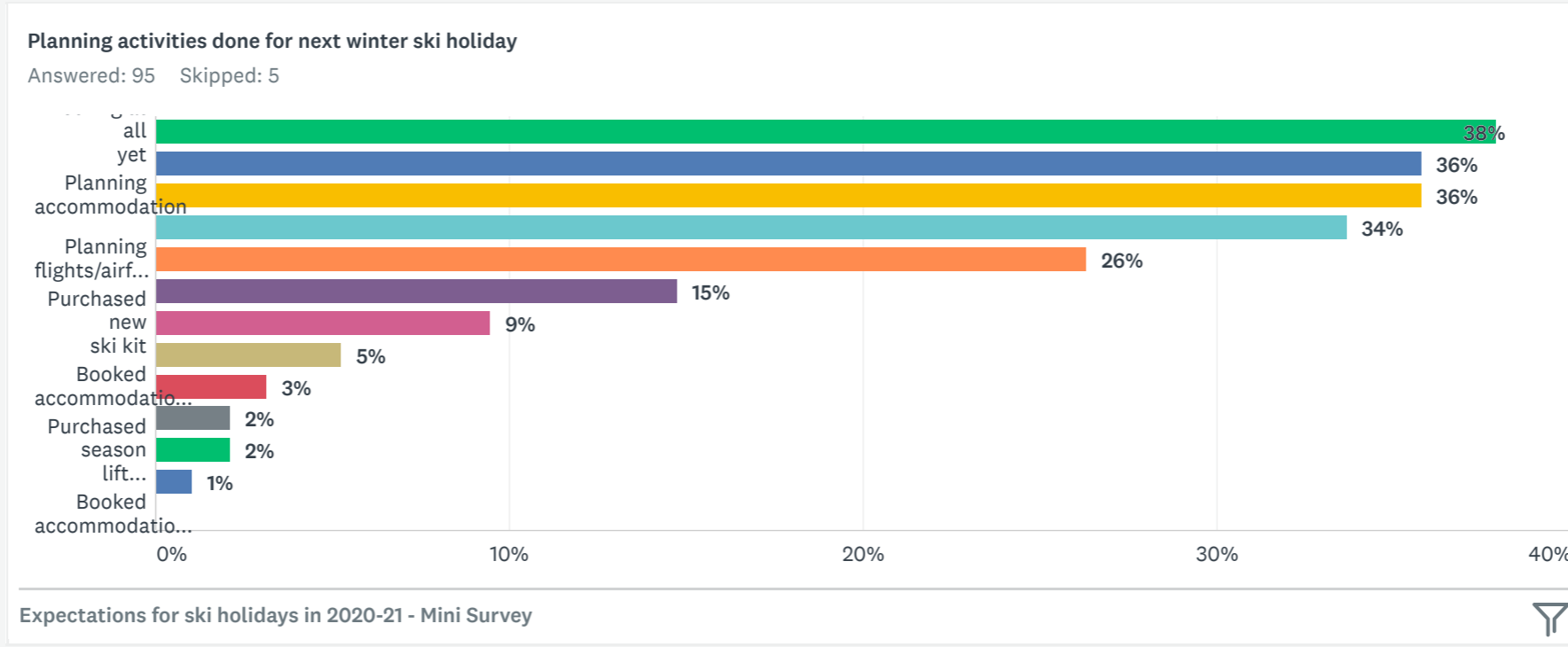
Four in 10 people Not at all/Not so confident for normal ski holidays.



And most taking a "wait and see" approach to planning and booking...

At this stage planning for ski holidays has largely been "passive", with many doing nothing yet (38%), and just over one third researching by exploring new ski destinations (36%) or searched/enquired about accommodation (36%).

Only 5% have made some form of booking for next winter.



Many people expect resorts and flights to operate normally, but hold concerns about financial losses and unexpected cancellations...

The greatest concern for ski holidays is not being compensated for enforced cancellations (38% very/extremely concerned) followed by cancellations at any time (30% very/extremely concerned)

Most people seem less concerned about a ski season not happening at all, little concerned about flights or resorts not operating or borders being closed. Concern for the Covid-19 virus itself is low.

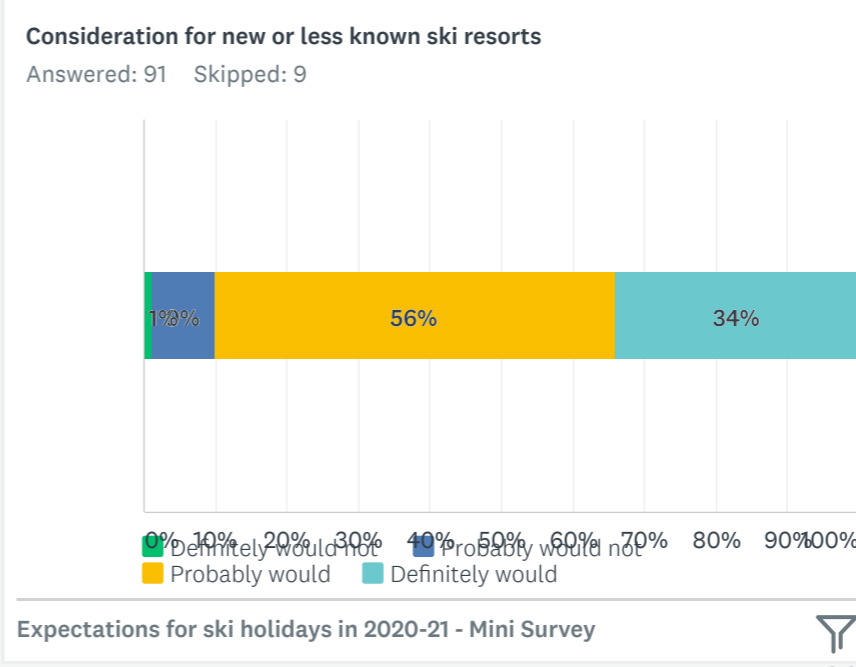
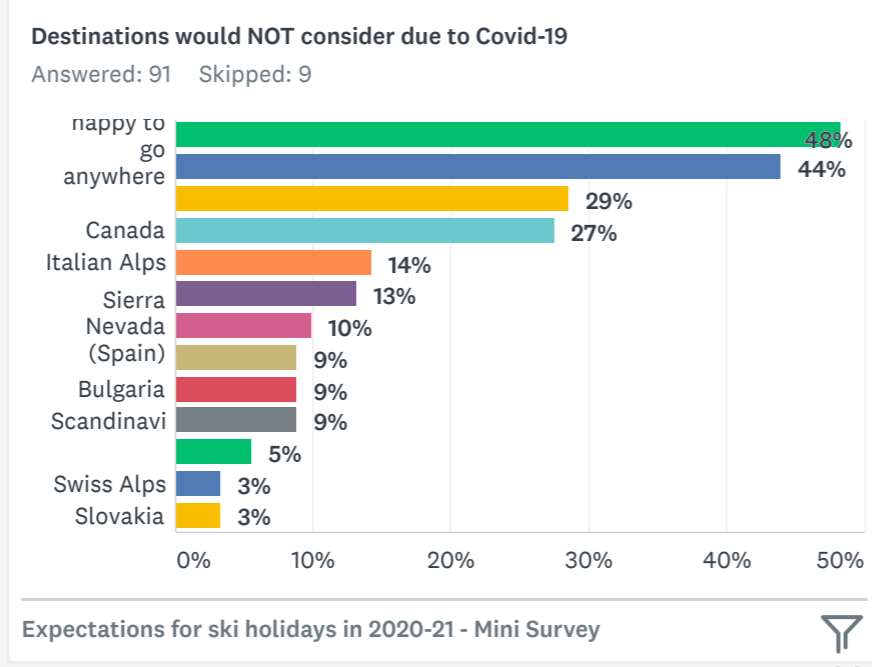
Rating of Concerns for European Ski Holidays

Concern	% rating Very/Extremely concerned
Not being compensated for cancellations	38%
Cancellations at any time	30%
No après ski events/limited F&B	23%
Being stranded	22%
Virus outbreaks at resorts/destinations	19%
Ski resorts operating with restrictions	16%
Ski resorts not operating at all	5%
Borders not being open at all	4%
Catching Covid-19 whilst on holiday	4%
Flights not operating at all	1%

Some minor concern over certain destinations with half happy to go anywhere, and most open to new or less known resorts...

Italian Alps (14%) and French Alps (13%) the top European destinations people would avoid due to virus concerns

Long haul travel to US, Canada and Japan less appealing due to virus concerns

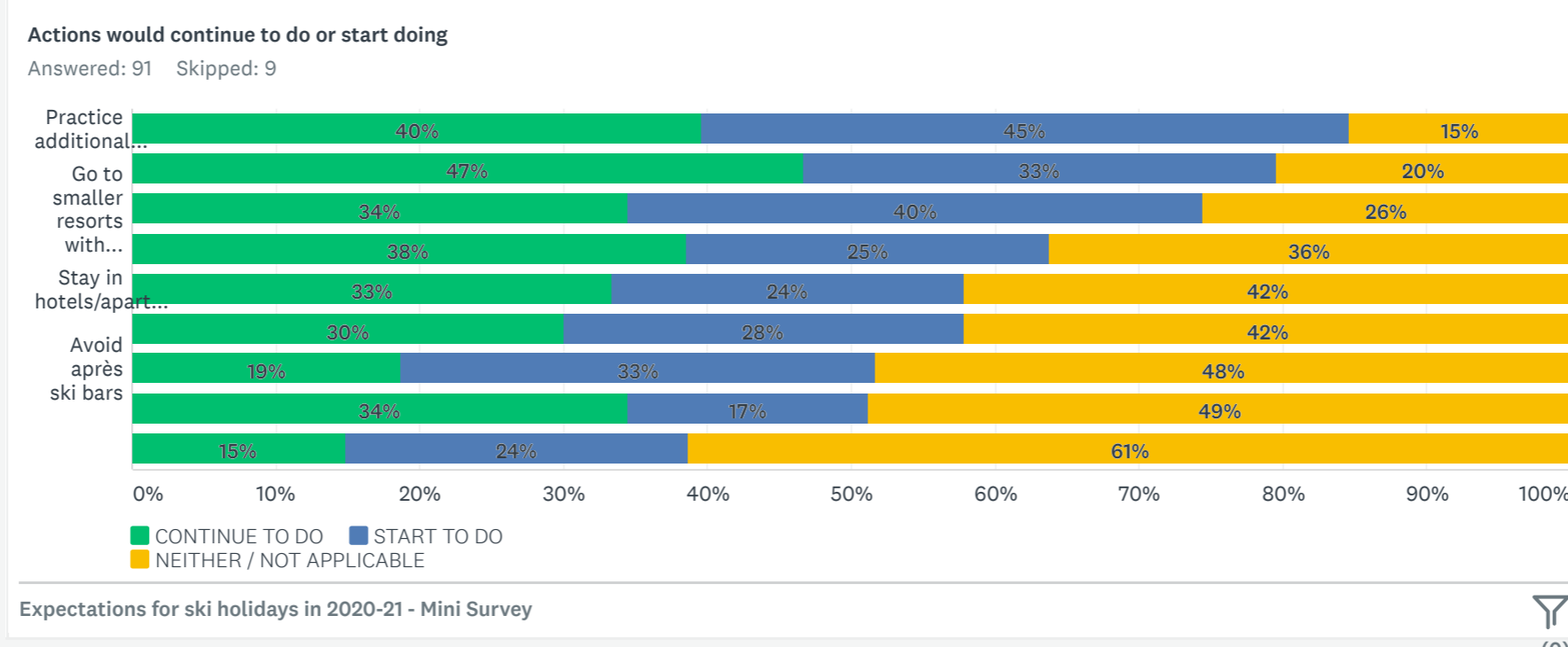


Current ski holiday-maker planning sees smaller resorts and self-managed holidays becoming more appealing, with Apres bars likely to see lower trade...

The largest absolute increase in new ways to do ski holidays is going to smaller resorts with less people - with 4 in 10 people starting to do so (54% growth).

One third will start to avoid Apres Ski bars, on top of the 12% that already do so (64% growth).

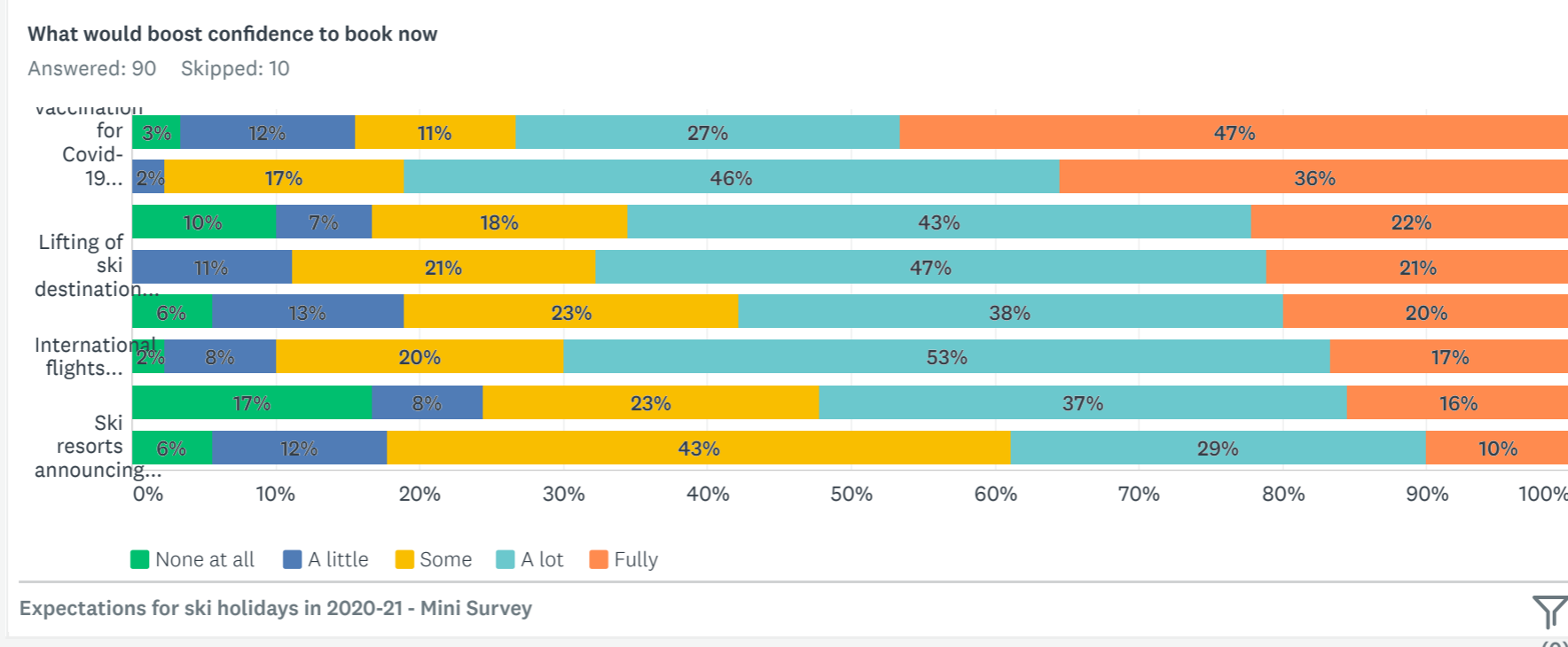
"Self" orientated holidays to increase with self-driving from UK (24% starting, 62% growth, but still remains the lowest of actions taken), choosing self-catering (25% starting, 40% growth), and hotel rooms/apartments over shared chalets (24% starting, 42% growth)



Operators can drive consumer confidence with flexible booking and cancellation policies...

Biggest impact on confidence to book ski holidays will come from operators operating flexible booking conditions, which would boost confidence fully/a lot for 82% of people.

Resumptions of flights (70%), lifting of lockdowns on UK or destination (65% or 68%) and announcements from ski resorts on normal winter operations (61%) are the other top confidence boosters for booking ski holidays now.



In summary

Consumer are keen to ski Europe, and accept ski holidays may not be normal in some respects. Despite expecting resorts, flights and borders to be operating, they lack confidence to book right now.

Operators should continue to plan for ski holidays next season, but start defining what they may look like for guests (ie what is the "new normal". A particular emphasis on actions and responses in the event of cancellations/disruptions, and flexible booking conditions to reduce the fear of cancellations would lift confidence to book.

The demand for smaller resorts, self-managed holidays increases, whilst activities such as Apres Ski bars and events will be less appealing.

This coming winter presents opportunities for:-

- Smaller resorts
- Self-controlled holidays
- Operators offering booking flexibility with refund security

And challenges for:-

- Super resorts (more so in France/Italy)
- Apres bars and restaurants

For further details contact:

Justin Garrett
Director - Jasna Adventures
justin@JasnaAdventures.co.uk
+421 907 216 380