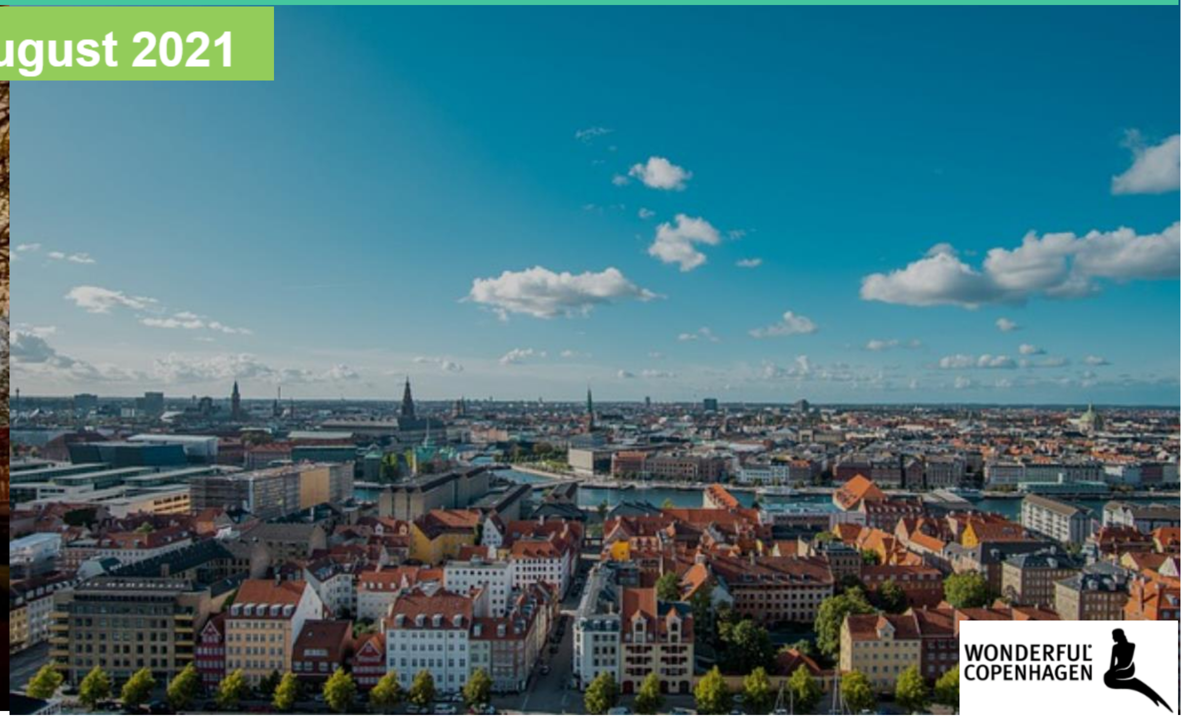
CITY BREAK PLANNING SURVEY

WAVE 2 - August 2021



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SURVEY METHODOLOGY

Survey specifications

- Markets surveyed: France, Germany, Italy, Netherlands, Norway, Sweden, UK
- Target: people having traveled abroad at least once in the past 3 years
- Fieldwork period: 20-27th August 2021
- Data collection: online interviews on Access Panel
- Sample Size: 500 completes per country (total of 3 500 completes)

General guidance on confidence level:

Sample size	100	200	300	400	500
Margin error	+/- 8%	+/- 6%	+/- 5%	+/- 4%	+/- 4%

For all questions asked to the total sample (not filtered), the margin error is +/- 4%

GENDER

	France	Germany	Italy	Netherlands	Norway	Sweden	UK
Female	52 %	52 %	51 %	50 %	53 %	51 %	52 %
Male	48 %	48 %	49 %	50 %	47 %	49 %	48 %

AGE

	France	Germany	Italy	Netherlands	Norway	Sweden	UK
18-34yo	35%	34%	36%	34%	29%	28%	33%
35-49yo	30%	32%	32%	30%	31%	23%	30%
50-75yo	35%	34%	32%	36%	40%	48%	37%

TOPLINES (1/2)

CITY BREAK TRAVEL INTENTIONS:

- **7 in 10 respondents on average would consider an international city break the next 6 months** (vs 6 in 10 in October 2020), confirming a **strong and increased demand for travel.**
- **French and Italians** are again the most enthusiastic while Netherlands, Norway and Swedish remain more conservative. On average, 3 respondent in 10 has already booked *(vs 1 in 5 in October 2020),* showing more confidence and maturity in the trip planning process today.
- With large vaccination rates boosting confidence for travel, the demand for **receiving attractive offers grow** and concerns focus on **uncertainties about sanitary rules when returning home** (quarantine, test etc), probably fueled by a lack of stability and predictability or policies applying.
- **Health and safety** remain an obstacle for a city break for 1 in 4 respondent, but it has **widely dropped vs 2020** (4 in 10). The decrease of Covid cases at destination is still seen as a key factor, yet the consumer mind is shifting from a "is it safe to go on a city break" to "is it safe and worth money wise".
- The sensitivity to deals has increased also due to **budgetary arbitrage taking place in consumers' mind. In the current mindset**, expectations for **flexibility in booking** remains essential.
- **Travel horizon** shows a great interest for the **summer shoulder season** (September/October), no matter the market. The demand for **Festive holidays and celebration** (Dec/Jan) also develops as a next possible window for a city break in travellers' mind. However Christmas plans may change according to the sanitary context evolution in Autumn.

DESTINATION PLANNING:

- All destinations have improved their safety perception, but **Nordics cities are still seen as the safest in overall.**
- **Copenhagen is ranked 2nd after Oslo** on this essential Covid-safety reputation facet.
- **45% of city break planners would certainly or probably visit Copenhagen** *(+ 6% vs 2020 - Best evolution vs Oslo and Stockholm)*.
- The likelihood to visit Copenhagen is quite consistent across markets, with higher rates though in geographically close markets (**Sweden and Norway**) and in **Italy** where 1 in 2 city trip planners would consider the Danish capital. In non-Nordic markets, the gap vs Stockholm is tight but slightly in favour of Copenhagen.
- The competition rises significantly from **Paris, London** and Southern EU cities (**Barcelona, Rome**) which record spectacular jumps in consideration rates.

TOPLINES (2/2)

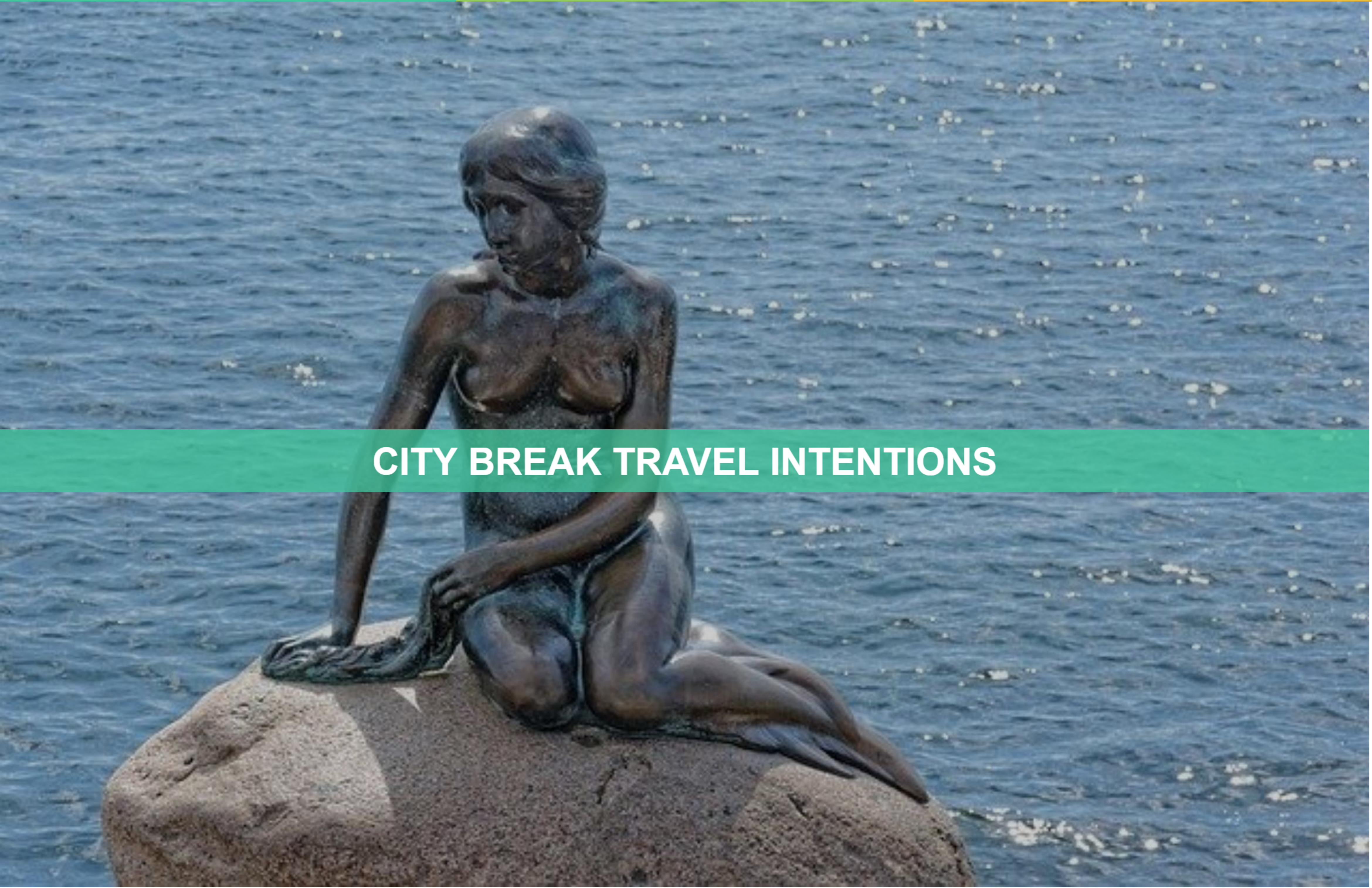
TRAVEL PREFERENCES:

- **While Nature/outdoor** and **Cultural activities** remain high on the traveller's bucket list, city breakers show **extended interest in many other activities including those exposing to more contacts**: leisure parks, nightlife, events, shopping...
- With the vaccination and "Green Pass" in place in many countries' restaurants, **food-related interest** is on the rise.
- The concept of **"local immersion"** remains highly expected in most markets.
- **Main sanitary measures expected are the "new basics"**: control of visitor capacity, masks and cleaning/disinfection standards.
- Though not advocated massively, the **quality of air conditioning** provides also reinsurance to visitors in cultural attractions.
- **Hotel remains the most popular option** for about 3/4 of potential city breakers. **Holiday homes and private rentals** are also well envisaged while staying with friends/relatives still represent 20% of future choices for lodging.
- Half of respondents still would prefer **city break destinations accessible by car or train** (as opposed to air).

ATTITUDES TOWARD VISITING ATTRACTIONS:

- **The vaccine has softened the concern about the risk of infection** when travelling abroad and **more people now feels comfortable visiting attractions** even if the virus spread has not been contained yet, suggesting some **expectations to go back to normal.**
- As a consequence, if the preference for outdoor/less crowded experiences vs indoor/busy attractions remains, it tends to diminish vs 2020. In overall, less travellers mention the pandemic will drastically change activities they would want to take during a city break.
- Though less essential than before, travellers still expect a **clear communication from attractions about sanitary precautions taken**
- **Desires to visit "physical" cultural attractions** (as opposed to digital ones) remain despite higher risk of infection
- **2 in 3** respondents claim **considering cultural attractions more or as much as before the pandemic** in the prospect of a city break. Some obstacles still exist for visiting cultural attractions compared to more "obvious" activities in mind in Covid era such as outdoor/nature activities. The growing interest in food activities (and/or shopping in some markets) also **may act as "competing" activities in mind.**

CITY BREAK TRAVEL INTENTIONS



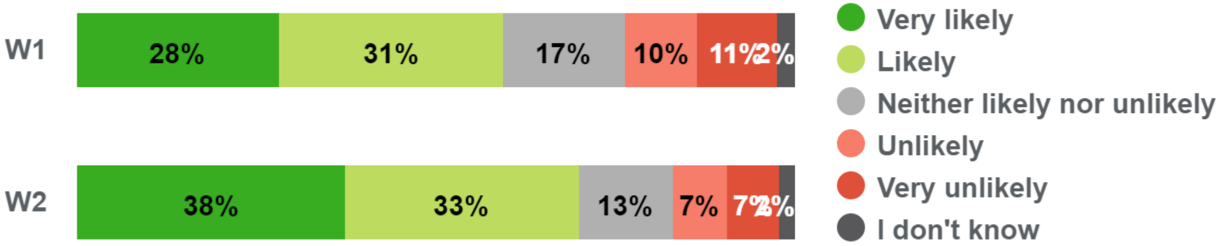
In a context of a high and rising demand for city breaks, the consumer sentiment is shifting more towards money-related triggers including expectations for attractive deals. With less dominant focus on health, growing demand for stable rules and booking flexibility expresses for accelerating trip planning.

Trends October 20 Vs. August 21 - all markets consolidated

ACTIVATORS FOR CONSIDERING A CITY BREAK

	W1	W2
A significant decrease in Corona virus cases at destination	37 %	37 %
Flexible booking, which can be cancelled or modified at no cost	32 %	33 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	27 %	31 %
An attractive offer (discounts on flights / accommodation)	19 %	28 %
The development of more effective treatment for the Corona virus	35 %	22 %
Friends or family expressing a desire to travel abroad on a city break	10 %	12 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	8 %	8 %
More flights available to the cities I want to visit	7 %	7 %

TRAVEL CONSIDERATION FOR A LEISURE CITY BREAK (6 MONTHS)

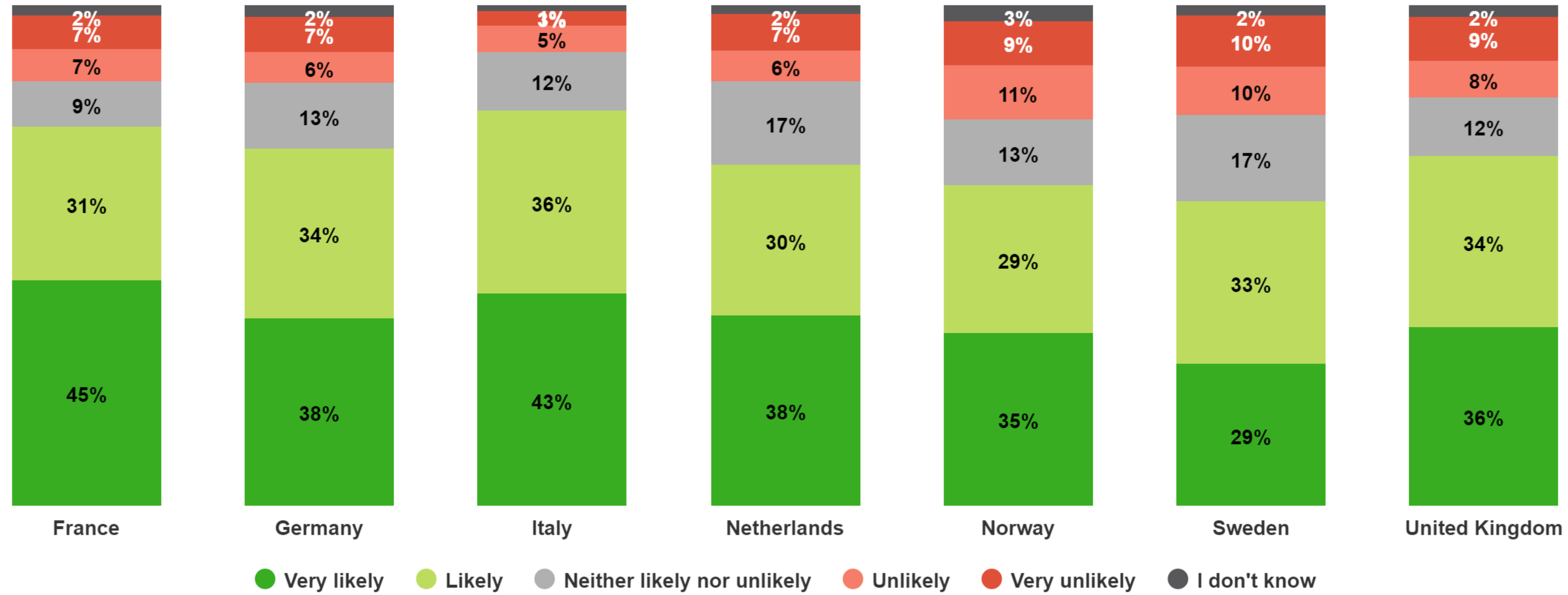


OBSTACLES FOR CONSIDERING A CITY BREAK

	W1	W2
Uncertainty/concerns about mandatory COVID-19 test and quarantine rule upon arrival when returning home	53 %	41 %
Uncertainty/concerns about travel restrictions	37 %	35 %
I am not certain that conditions will allow me to enjoy the full experience at destination	32 %	27 %
Uncertainty/concerns about my health and safety	41 %	24 %
Uncertainty/concerns about the sanitary context at destination	32 %	24 %
It’s too expensive / not in my budget priorities to come	14 %	23 %
No time to plan a trip abroad for the time being	18 %	21 %
I prefer visiting destinations nearby, in my own country	12 %	17 %
Uncertainty/concerns about lack of flights / flight cancellations	22 %	14 %
Government authorities recommend not to plan any travelling	28 %	13 %
I would feel safer planning trips outside of cities (nature / coastal vacations)	12 %	11 %
I do not like taking short leisure city break in general	8 %	10 %

French and Italians are still the most enthusiastic *(more than 75% positive)* while Netherlands, Norway and Swedish remain more cautions. In average 3 respondent in 10 has already booked their trip *(vs 1 respondent in 5 for October wave)*.

TRAVEL CONSIDERATION FOR A LEISURE CITY BREAK (6 MONTHS)



CITY BREAK TRIP ALREADY BOOKED?

France	Germany	Italy	Netherlands	Norway	Sweden	United Kingdom
Yes 36%	Yes 34%	Yes 26%	Yes 30%	Yes 26%	Yes 20%	Yes 30%

Summer shoulder season is well considered as short term horizon for most markets. The end-or-year Festive celebrations also show as a next possible window for city trip planning, notably for Northern/Nordic markets.

TRAVEL HORIZON AMONG CITY BREAK BOOKERS

	August 2021	September 2021	October 2021	November 2021	December 2021	January 2022	February 2022
France	35%	34%	29%	17%	22%	16%	13%
Germany	31%	33%	28%	12%	19%	12%	13%
Italy	20%	36%	23%	14%	24%	19%	19%
Netherlands	26%	44%	29%	18%	24%	21%	14%
Norway	19%	35%	27%	24%	31%	16%	16%
Sweden	27%	32%	22%	25%	27%	14%	20%
United Kingdom	16%	39%	28%	27%	28%	26%	16%

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Uncertainties about sanitary rules (tests, quarantines), though less mentioned vs 2020, remain the largest obstacle for travellers. The UK and Norway express high concerns about travel restrictions. Sweden reports more timing contraints compared to other markets, while Italy evokes uncertainties on budget priorities. The fear on living the full experience is still high in mind for most markets.

OBSTACLES FOR CONSIDERING A CITY BREAK

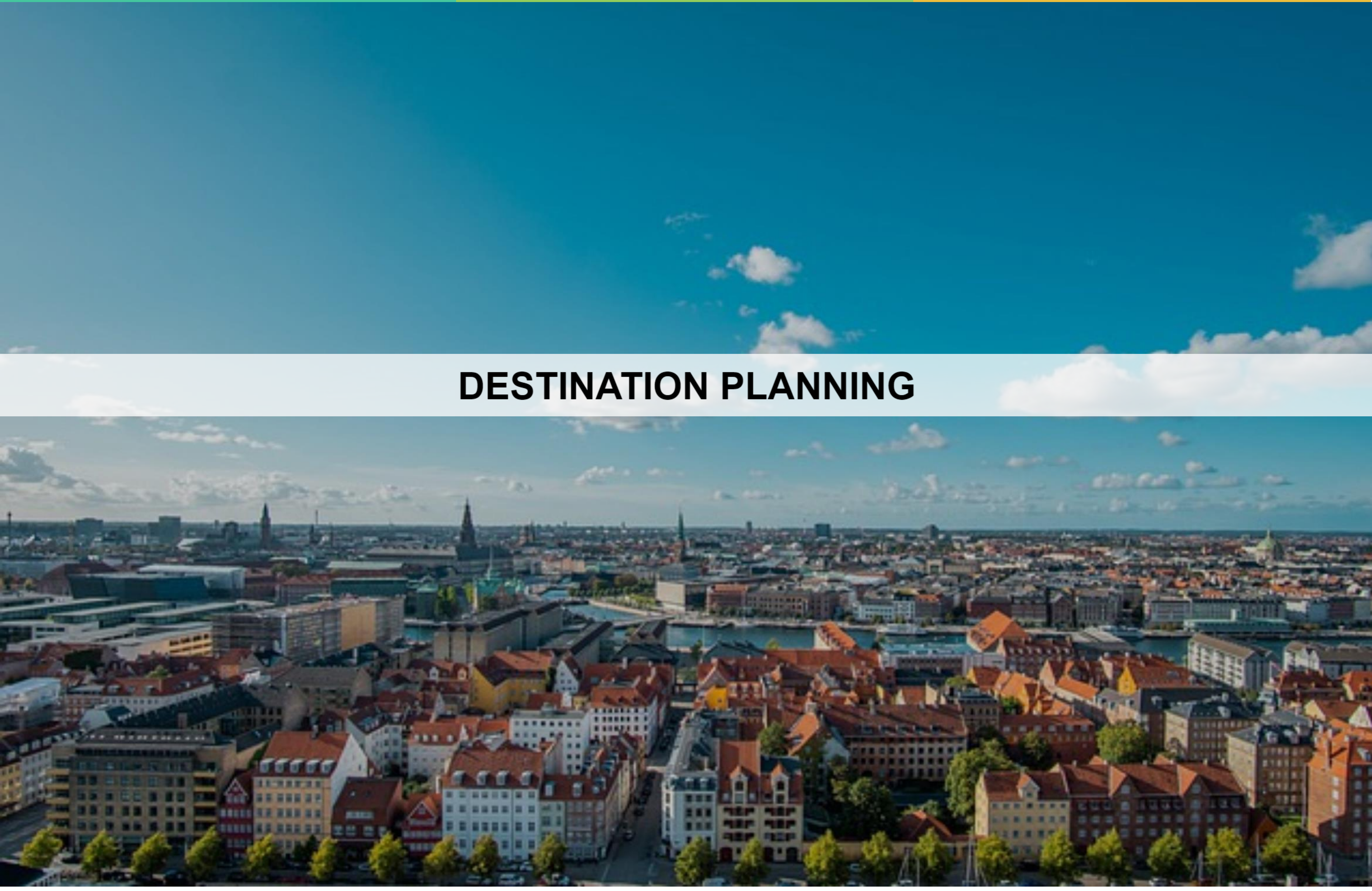
	France	Germany	Italy	Netherlands	Norway	Sweden	United Kingdom
Uncertainty/concerns about mandatory COVID-19 test and quarantine rule upon arrival when returning home	43%	45%	31%	31%	46%	25%	62%
Uncertainty/concerns about the sanitary context at destination	35%	22%	31%	11%	15%	36%	18%
Uncertainty/concerns about travel restrictions	29%	33%	18%	25%	45%	26%	58%
I am not certain that conditions will allow me to enjoy the full experience at destination	27%	26%	29%	20%	19%	36%	30%
I prefer visiting destinations nearby, in my own country	23%	26%	29%	12%	17%	14%	7%
It's too expensive / not in my budget priorities to come	20%	18%	27%	23%	29%	25%	17%
Uncertainty/concerns about my health and safety	20%	32%	33%	21%	24%	16%	30%
Uncertainty/concerns about lack of flights / flight cancellations	16%	14%	11%	9%	12%	7%	29%
No time to plan a trip abroad for the time being	15%	28%	9%	15%	20%	45%	7%
Government authorities recommend not to plan any travelling	9%	7%	7%	5%	18%	24%	14%
I do not like taking short leisure city break in general	9%	5%	4%	20%	11%	10%	8%
None of the above	7%	4%	2%	4%	4%	5%	1%
I would feel safer planning trips outside of cities (nature / coastal vacations)	5%	13%	9%	13%	12%	9%	11%
Other	0%	8%	11%	4%	5%	9%	10%

The number of Covid cases is still a major "landmark" for travel activation across markets, however stability in rules and booking flexibility required for planning are now equally important. Dutch are particularly looking for deals while Germans and British are sensitive to stability and flexibility for booking.

ACTIVATORS FOR CONSIDERING A CITY BREAK

	France	Germany	Italy	Netherlands	Norway	Sweden	United Kingdom
A significant decrease in Corona virus cases at destination	40%	39%	47%	28%	30%	38%	46%
Flexible booking, which can be cancelled or modified at no cost	36%	42%	47%	23%	28%	29%	36%
An attractive offer (discounts on flights / accommodation)	33%	28%	35%	33%	23%	24%	23%
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	26%	39%	30%	16%	31%	31%	45%
Completed Corona virus vaccination for me and my friends / family traveling with me	23%	27%	27%	16%	23%	27%	19%
The development of more effective treatment for the Corona virus	18%	25%	36%	18%	19%	25%	18%
Friends or family expressing a desire to travel abroad on a city break	18%	8%	7%	13%	11%	14%	13%
More flights available to the cities I want to visit	8%	8%	6%	5%	7%	6%	7%
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	8%	8%	5%	8%	14%	7%	5%

DESTINATION PLANNING



All destinations report more positive safety perception but Nordics cities are still seen as the safest. Copenhagen is ranked #2 on this essential reputation facet, helping the Danish Capital city to consolidate a solid competitive position in consideration rates. The competition rises from Paris, London, Rome and Barcelona.

Trends October 20 Vs. August 21 - all markets consolidated

LIKELIHOOD TO VISIT...

% Top 2 box (Definitely + Probably)

	W1	W2
London	44 %	52 %
Rome	43 %	52 %
Paris	42 %	51 %
Barcelona	38 %	50 %
Amsterdam	42 %	49 %
Copenhagen	39 %	45 %
Berlin	40 %	45 %
Stockholm	39 %	42 %
Prague	36 %	42 %
Lisbon	35 %	42 %
Oslo	36 %	38 %
Dublin	35 %	38 %
Brussels	28 %	33 %
Aarhus / Århus	17 %	22 %

SANITARY SAFETY PERCEPTION

Net Score (% Safe - Unsafe)

	W1	W2
Oslo	7 %	31 %
Copenhagen	5 %	29 %
Stockholm	2 %	27 %
Berlin	-3 %	21 %
Amsterdam	-8 %	17 %
Dublin	-6 %	16 %
Brussels	-18 %	13 %
Aarhus / Århus	-10 %	11 %
Rome	-16 %	11 %
Prague	-11 %	11 %
Lisbon	-14 %	8 %
Paris	-33 %	6 %
Barcelona	-35 %	5 %
London	-31 %	5 %

The likelihood to visit Copenhagen is quite consistent across markets, with higher rates though in geographically close markets (**Sweden and Norway**) and in **Italy** where 1 in 2 city trip planners would consider the Danish capital. In non-Nordic markets, the gap vs Stockholm is tight but slightly in favour of Copenhagen.

LIKELYHOOD TO VISIT... *% Top 2 box (Definitely + Probably)*

	France	Germany	Italy	NL	Norway	Sweden	UK
London	51%	42%	63%	46%	58%	44%	63%
Rome	60%	50%	68%	42%	47%	39%	58%
Paris	63%	51%	66%	43%	45%	36%	55%
Barcelona	60%	46%	62%	46%	45%	37%	59%
Amsterdam	47%	50%	64%	50%	44%	33%	53%
Copenhagen	37%	35%	54%	35%	64%	52%	39%
Berlin	41%	52%	54%	46%	41%	35%	43%
Stockholm	36%	32%	49%	31%	46%	63%	38%
Prague	39%	40%	57%	36%	43%	30%	47%
Lisbon	55%	37%	58%	35%	35%	26%	44%
Oslo	33%	29%	44%	29%	65%	34%	33%
Dublin	36%	28%	52%	32%	39%	26%	50%
Brussels	40%	28%	43%	36%	32%	17%	37%

Aarhus / Århus	13%	18%	18%	18%	41%	23%	21%

Copenhagen is among the TOP best rated cities for all markets surveyed, on this essential dimension of sanitary safety.

SANITARY SAFETY PERCEPTION - *Net Score (% Safe - Unsafe)*

	France	Germany	Italy	NL	Norway	Sweden	UK
Oslo	16%	13%	48%	40%	41%	22%	36%
Copenhagen	22%	20%	49%	42%	25%	13%	34%
Stockholm	25%	14%	49%	41%	1%	22%	38%
Berlin	24%	21%	39%	36%	10%	-6%	28%
Amsterdam	16%	7%	37%	33%	7%	-14%	32%
Dublin	14%	0%	44%	21%	4%	-15%	41%
Brussels	17%	4%	34%	24%	5%	-19%	23%
Rome	18%	-2%	43%	16%	1%	-21%	24%
Prague	14%	-3%	33%	23%	6%	-23%	26%
Lisbon	10%	-8%	28%	21%	-4%	-20%	28%
Paris	21%	0%	19%	10%	-3%	-21%	19%
Barcelona	13%	-8%	14%	16%	-4%	-27%	28%
London	12%	-12%	11%	12%	-4%	-28%	40%
Aarhus / Århus	-6%	1%	10%	25%	27%	5%	17%

NOTE: Arhus has a high score for "I don't know"for French (39%), Italy (42%), Netherlands (38%) and UK (38%). We explain these scores due to its lowest awareness vs other cities.

TRAVEL PREFERENCES

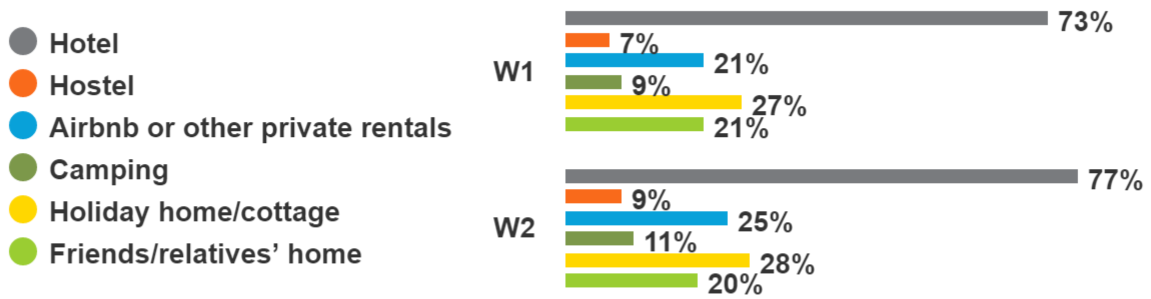
While Nature/outdoor and **Cultural activities** remain high on the traveller's bucket list, city breakers show **extended interest in many other activities including those exposing to more contacts**: leisure parks, nightlife, events, shopping...With the vaccination and "Green Pass" in place in many countries' restaurants, **food-related interest** is also on the rise. **Controls on visitor capacity** is the most expected sanitary safety measure.

Trends October 20 Vs. August 21 - all markets consolidated

ACTIVITIES ENVISAGED FOR NEXT CITY BREAK

ACTIVITIES	W1	W2
Visiting cultural attractions (museums, historical sites, churches, castles etc.)	52%	51%
Nature / outdoor activities (hiking, swimming, fishing, sailing, exploring nearby woods etc.)	50%	50%
Taking gastronomic activities (restaurants, cafés and food markets)	47%	51%
Shopping (city mall, souvenirs, handicrafts etc.)	41%	45%
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places meeting locals…)	40%	41%
Guided tours / Excursions	32%	34%
Visiting leisure attractions (theme parks, escape rooms, canal boat tours etc.)	28%	34%
Spa/wellness activities	22%	25%
Attending events (concerts, theatre, dance show, sports etc.)	19%	24%
Exploring the city's nightlife (i.e. bars, nightclubs)	19%	23%
Activities for children	12%	14%
I don't know	7%	5%

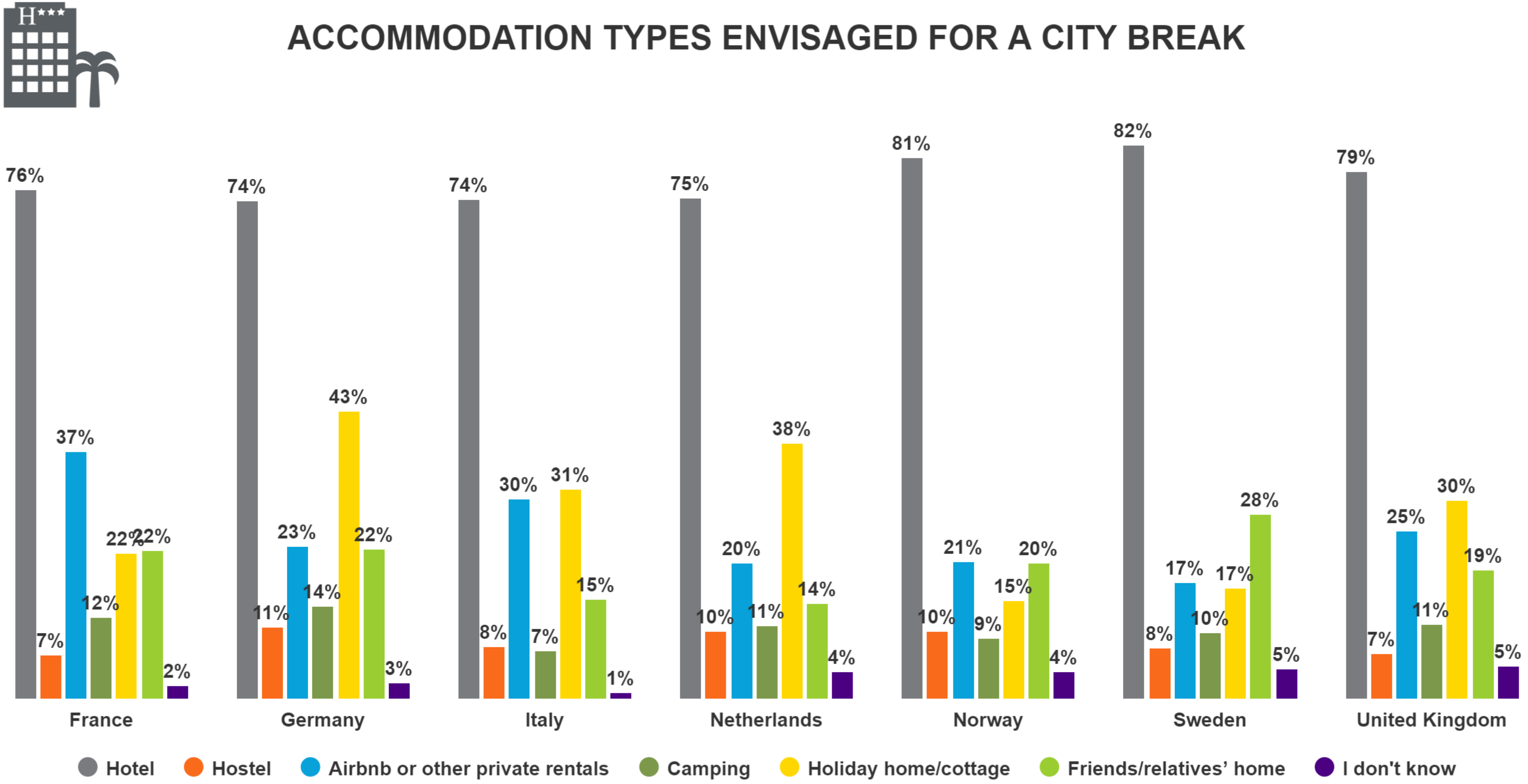
ACCOMMODATION TYPES ENVISAGED FOR A CITY BREAK



SANITARY MEASURES EXPECTED FOR CULTURAL/LEISURE ATTRACTIONS

MEASURES	W1	W2
Reduced visitor capacity	42%	40%
Wearing of mask compulsory for both employees & visitors	40%	34%
Increased standards of cleaning/disinfection	36%	34%
Set up distances in queue lines	25%	23%
Increased availability of alcoholic gel / soap	23%	20%
Temperature checks at the entrance	22%	17%
Touch-free payments	17%	18%
Availability of masks on demand	16%	17%
Virtual queue line instead of standing in the queue	13%	15%
The quality of air conditioning	11%	17%
Increased availability of medical staff / health center / helpline	11%	11%
An app to plan & optimize your visit in real time	10%	12%

Hotel remains the most popular option for about 3/4 of potential city breakers. Holiday homes are also well envisaged (notably for Germans and Dutch) while staying with friends/relatives still represent 20% of future choices for lodging. Private rentals is high in mind of French and Italians.



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The interest for gastronomy is particularly high among French and Nordic markets, while culture acts as a key driver in Italy (including guided tours) and in the UK. The local immersion remains highly attractive for most markets.

ACTIVITIES ENVISAGED FOR NEXT CITY BREAK

	France	Germany	Italy	Netherlands	Norway	Sweden	United Kingdom
Taking gastronomic activities (restaurants, cafés and food markets)	62%	53%	58%	48%	44%	51%	38%
Nature / outdoor activities (hiking, swimming, fishing, sailing, exploring nearby woods etc.)	61%	53%	50%	53%	43%	47%	43%
Visiting cultural attractions (museums, historical sites, churches, castles etc.)	51%	49%	64%	48%	42%	52%	49%
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places meeting locals…)	45%	39%	50%	42%	36%	43%	36%
Shopping (city mall, souvenirs, handicrafts etc.)	42%	41%	43%	49%	46%	46%	45%
Guided tours / Excursions	38%	31%	50%	36%	22%	36%	29%
Spa/wellness activities	34%	27%	29%	17%	22%	27%	20%
Visiting leisure attractions (theme parks, escape rooms, canal boat tours etc.)	30%	34%	36%	33%	32%	37%	35%
Attending events (concerts, theatre, dance show, sports etc.)	26%	24%	22%	20%	26%	24%	25%
Exploring the city's nightlife (i.e. bars, nightclubs)	23%	21%	31%	17%	22%	23%	24%
Activities for children	18%	16%	12%	12%	13%	12%	18%
Digital cultural activities (theater streamed online, digital museum tours, streamed workshops / lectures, streamed concerts etc.)	16%	13%	16%	8%	10%	11%	15%
Educational activities (workshops, lectures, talks etc.)	15%	11%	12%	11%	9%	8%	11%
I don't know	2%	4%	1%	4%	7%	6%	8%

The focus on capacity management in attractions is particularly sensitive in Northern/Nordic markets. Italians and French are more focusing on everyone wearing masks and increased standard disinfection procedures, while air conditioning would be quite reinsuring for British and Dutch visitors.

SANITARY MEASURES EXPECTED FOR CULTURAL/LEISURE ATTRACTIONS

	France	Germany	Italy	Netherlands	Norway	Sweden	United Kingdom
Wearing of mask compulsory for both employees & visitors	42%	40%	45%	23%	27%	28%	34%
Increased standards of cleaning/disinfection	37%	34%	43%	27%	33%	34%	31%
Reduced visitor capacity	37%	48%	30%	44%	42%	44%	36%
Set up distances in queue lines	24%	21%	21%	26%	18%	29%	20%
Touch-free payments	21%	18%	10%	16%	24%	16%	22%
Increased availability of alcoholic gel / soap	18%	15%	16%	19%	29%	22%	22%
Temperature checks at the entrance	18%	14%	25%	13%	13%	11%	23%
An app to plan & optimize your visit in real time	17%	10%	16%	17%	8%	10%	9%
Availability of masks on demand	14%	17%	15%	16%	23%	17%	17%
The quality of air conditioning	13%	15%	16%	20%	14%	16%	23%
Virtual queue line instead of standing in the queue	12%	13%	16%	15%	13%	23%	12%
Increased availability of medical staff / health center / helpline	9%	14%	16%	9%	10%	9%	12%

ATTITUDES TOWARDS TRAVEL AND ATTRACTIONS

The vaccine has softened the concern about the risk of infection when travelling abroad fuels reassurance for visiting attractions. The overall sentiment trend related to travel and attractions expresses expectations for a "caution back to normal" experience, even if busy indoor experiences still are less attractive vs outdoor and less crowded sites in the pandemic context.

Trends October 20 Vs. August 21

IMPACT OF CORONAVIRUS ON TRAVEL PREFERENCES *(% Top 2 box: Strongly agree / Agree)*

	W1	W2
My choice of future travel destinations will depend heavily on how well the destination is controlling the Corona virus outbreak	79 %	72 %
I am very concerned about the risk of infection with the Corona virus when travelling abroad.	67 %	55 %
I would prefer city break destinations accessible by car or train, as opposed to by air.	52 %	49 %

IMPACT OF CORONAVIRUS ON ACTIVITIES CHOICE *(% Top 2 box: Strongly agree / Agree)*

	W1	W2
I prefer outdoor activities to indoor activities (visiting museums, attractions etc.), because it lowers the risk of exposure to the Corona virus.	67 %	63 %
I will look for less crowded places to visit, even if it means "missing" must-see attractions.	66 %	59 %
The outbreak of the Corona virus has drastically changed the type of activities that I am willing to take part in during city breaks	65 %	57 %
When going on a city break abroad, I would rather visit attractions / areas used by locals, as opposed to the more touristy areas	51 %	52 %

IMPACT OF CORONA VIRUS ON VISITING ATTRACTIONS *(% Top 2 box: Strongly agree / Agree)*

	W1	W2
It is essential to me, that attractions explicitly indicate what precautions they have taken to ensure a safe visit, with minimal risk of exposure to the Corona virus.	70 %	63 %
I feel comfortable visiting attractions, even though the spread of the Corona virus has not yet been fully contained	33 %	42 %
If possible, I would prefer digital tours of museums rather than physically visiting a museum, because of the risk of infection with the Corona virus.	32 %	29 %

The control of Coronavirus outbreak is still a major criteria for chosing a destination, especially for Italians, French and British. Germans seems more inclined to take their car or the train for a city break, contrary to Nordic markets, while Dutch and British are looking for less restrictions and sanitary requirements.

IMPACT OF CORONAVIRUS ON TRAVEL PREFERENCES

(% Top 2 box: Strongly agree / Agree)

	FRANCE	GERMANY	ITALY	NETHERLANDS	NORWAY	SWEDEN	UNITED KINGDOM
My choice of future travel destinations will depend heavily on how well the destination is controlling the Corona virus outbreak	75 %	72 %	78 %	69 %	66 %	69 %	75 %
I am very concerned about the risk of infection with the Corona virus when travelling abroad.	54 %	56 %	62 %	47 %	54 %	48 %	65 %
I prefer to travel to destinations with limited restrictions (no requirements for facemask, isolation etc.)	52 %	51 %	49 %	59 %	49 %	37 %	60 %
I would prefer city break destinations accessible by car or train, as opposed to by air.	50 %	60 %	51 %	56 %	40 %	38 %	51 %

A preference for outdoor activities reaches a consensus across markets, though less obvious in Norway and the Netherlands. Those markets seem more open than others to visit again busy and must-see places. Th perception of impact on projected city break activities is higher in France.

IMPACT OF CORONAVIRUS ON ACTIVITIES CHOICE

(% Top 2 box: Strongly agree / Agree)

	FRANCE	GERMANY	ITALY	NETHERLAN...	NORWAY	SWEDEN	UNITED KINGDOM
I prefer outdoor activities to indoor activities (visiting museums, attractions etc.), because it lowers the risk of exposure to the Corona virus.	67 %	62 %	67 %	58 %	57 %	63 %	67 %
The outbreak of the Corona virus has drastically changed the type of activities that I am willing to take part in during city breaks	65 %	59 %	58 %	47 %	55 %	57 %	61 %
I will look for less crowded places to visit, even if it means "missing" must-see attractions.	63 %	61 %	62 %	51 %	57 %	58 %	63 %
When going on a city break abroad, I would rather visit attractions / areas used by locals, as opposed to the more touristy areas	52 %	52 %	52 %	51 %	51 %	49 %	55 %

Travellers still expect a clear communication of pandemic precautions taken by attractions, especially in Italy and France. Sweden are the most reticent in visiting attractions while French and Italiens are the most comfortable. The logistic troublesome for planning attractions' visit does not seem to be a major concern for most markets. Visiting physical cultural attractions (as opposed to digital) remain a strong preference, while health concerns are diminishing.

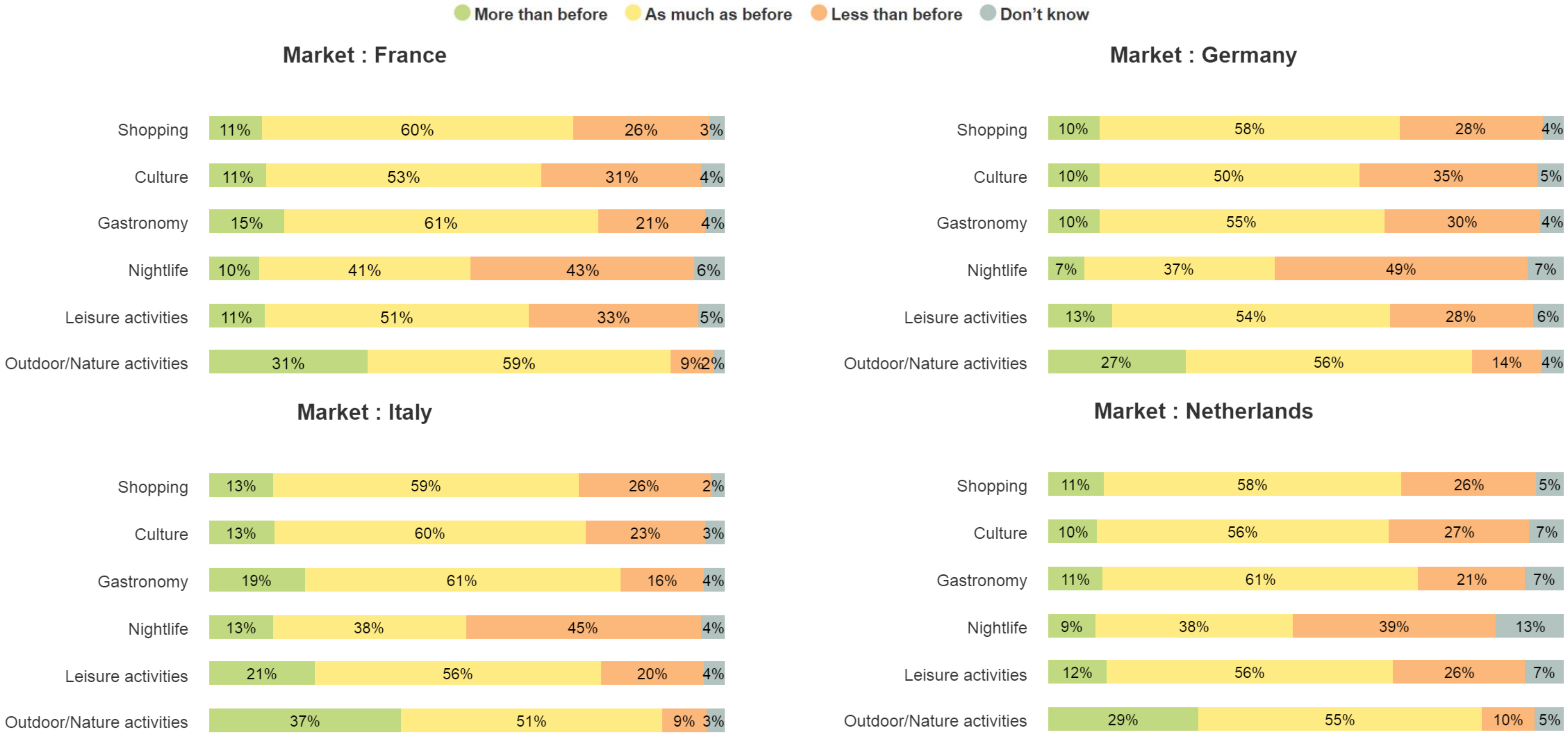
IMPACT OF CORONA VIRUS ON VISITING ATTRACTIONS

(% Top 2 box: Strongly agree / Agree)

	FRANCE	GERMANY	ITALY	NETHERLANDS	NORWAY	SWEDEN	UNITED KINGDOM
It is essential to me, that attractions explicitly indicate what precautions they have taken to ensure a safe visit, with minimal risk of exposure to the Corona virus.	71 %	64 %	73 %	50 %	59 %	58 %	66 %
I feel comfortable visiting attractions, even though the spread of the Corona virus has not yet been fully contained	50 %	41 %	48 %	41 %	39 %	27 %	49 %
I am less interested in visiting cultural attractions, because it is a hazzle troublesome to organize attraction visits when you are required to have a valid COVID-19 pass and book a timeslot for your visit at the attraction.	46 %	48 %	40 %	42 %	48 %	38 %	50 %
I wish more digital experiences were developed, that I could participate in from home (online lectures, concerts, workshops, museum tours etc.)	38 %	32 %	39 %	27 %	33 %	30 %	39 %
If possible, I would prefer digital tours of museums rather than physically visiting a museum, because of the risk of infection with the Corona virus.	29 %	31 %	33 %	27 %	28 %	22 %	35 %

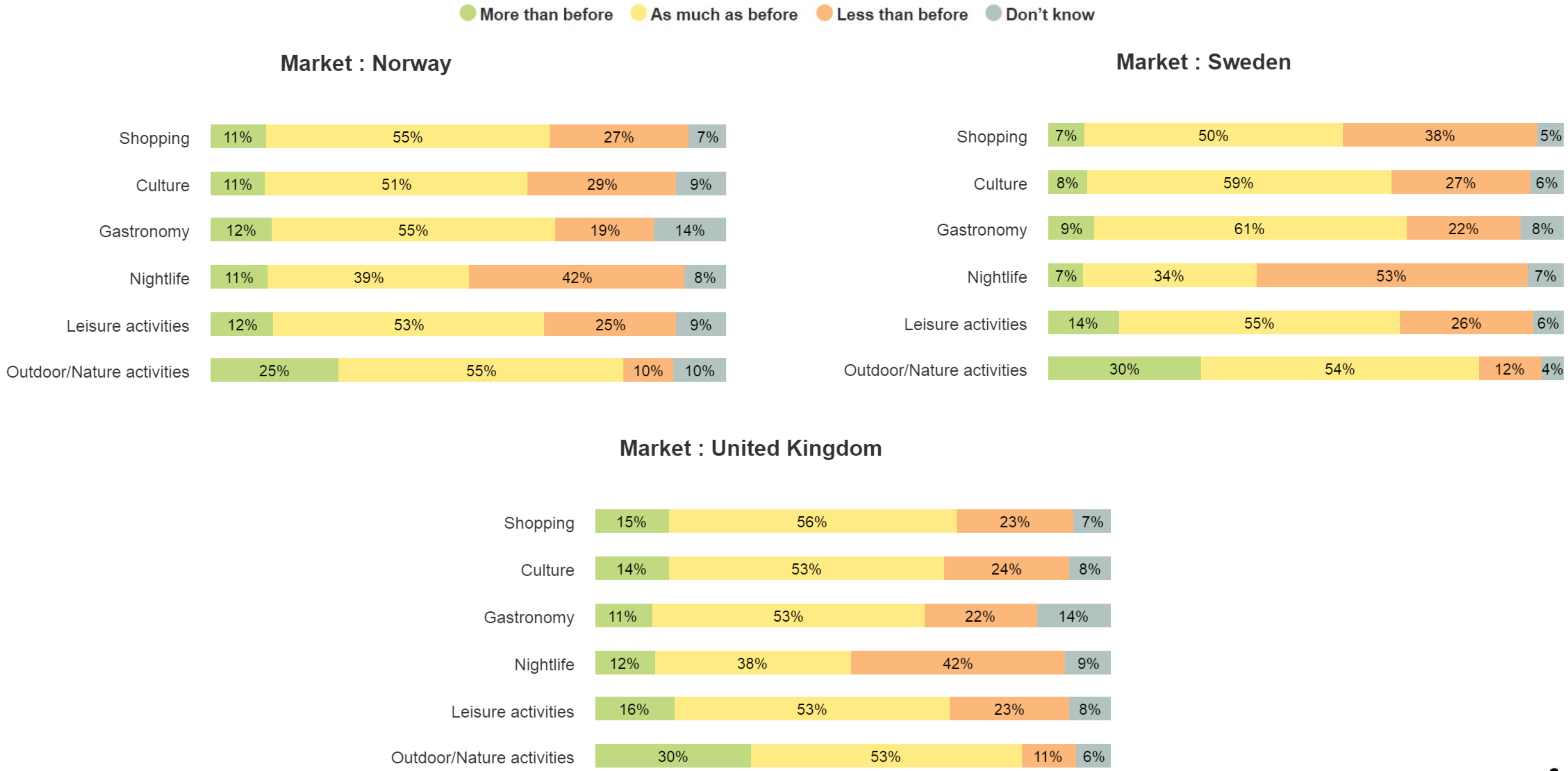
Perceptions around what city breakers would do more or less compared to pre-Covid confirms the obvious preference for outdoor/nature activities, but in most markets, other categories of experiences are envisaged more or as much as before. The only exception is the anticipated decline for nightlife experiences (which in many place is still known to be closed or very restricted). Italy shows higher interest for culture vs other markets.

IMPACT OF CORONA VIRUS ON ACTIVITIES (1/2)



Similar trends are observed in Nordic markets and in the UK, with outdoor anticipated more on the bucket list vs other activities, and nightlife more restricted. In overall. Sweden seems more conservative on projected activities in overall compared to Norway.

IMPACT OF CORONA VIRUS ON ACTIVITIES (2/2)



TCI Research Travel Competitive Intelligence

WONDERFUL COPENHAGEN

MARKET POTENTIAL PROFILING

PROFILING CONSUMERS OPEN TO A CITY BREAK IN COPENHAGEN

Defined as travelers with positive intention for visiting Copenhagen in the next 6 months (definitely, probably) AND stating Copenhagen is a safe place to visit in the context of the Covid-19

FRENCH OPEN TO COPENHAGEN (N=136)

LIKELYHOOD TO VISIT

Paris	46%
Rome	40%
Barcelona	38%
London	38%
Copenhagen	35%
Lisbon	35%
Amsterdam	28%
Stockholm	28%
Berlin	26%
Dublin	25%
Oslo	25%
Prague	25%
Brussels	24%
Aarhus / Århus	13%

CITY TRAVEL ACTIVATORS

Flexible booking, which can be cancelled or modified at no cost	53 %
A significant decrease in Corona virus cases at destination	47 %
An attractive offer (discounts on flights / accommodation)	47 %
Completed Corona virus vaccination for me and my friends / family traveling with me	33 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	27 %
More flights available to the cities I want to visit	20 %
The development of more effective treatment for the Corona virus	13 %
Friends or family expressing a desire to travel abroad on a city break	7 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	7 %

THEY WOULD STAY IN...

Hotel	80%
Airbnb or other private rentals	42%
Holiday home/cottage	28%
Friends/relatives' home	21%
Camping	14%
Hostel	13%

ACTIVITIES TO PROMOTE

Taking gastronomic activities (restaurants, cafés and food markets)	63 %
Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	61 %
Visiting cultural attractions (museums, historical sites, castles etc.)	57 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	49 %
Guided tours / Excursions	43 %
Shopping (city mall, souvenirs, handicrafts etc.)	40 %
Visiting leisure attractions (theme parks, escape rooms etc.)	33 %
Spa/wellness activities	32 %
Attending events (concerts, theatre, dance show, sports etc.)	32 %
Exploring the city's nightlife (i.e. bars, nightclubs)	24 %
Activities for children	24 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	23 %
Educational activities (workshops, lectures, talks etc.)	20 %

AGE

18-34yo	30%
35-49yo	42%
50-75yo	28%

GERMANS OPEN TO COPENHAGEN (N=133)

LIKELYHOOD TO VISIT

Copenhagen	36%
Paris	36%
Rome	36%
Amsterdam	35%
Berlin	32%
Barcelona	31%
Prague	30%
London	29%
Lisbon	29%
Stockholm	27%
Oslo	26%
Dublin	23%
Brussels	20%
Aarhus / Århus	18%

CITY TRAVEL ACTIVATORS

Flexible booking, which can be cancelled or modified at no cost	57 %
A significant decrease in Corona virus cases at destination	48 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	48 %
The development of more effective treatment for the Corona virus	43 %
Completed Corona virus vaccination for me and my friends / family traveling with me	43 %
An attractive offer (discounts on flights / accommodation)	38 %
Friends or family expressing a desire to travel abroad on a city break	19 %
More flights available to the cities I want to visit	14 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	10 %

THEY WOULD STAY IN...

Hotel	77%
Holiday home/cottage	48%
Airbnb or other private rentals	32%
Friends/relatives' home	24%
Hostel	19%
Camping	15%

ACTIVITIES TO PROMOTE

Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	60 %
Taking gastronomic activities (restaurants, cafés and food markets)	52 %
Visiting cultural attractions (museums, historical sites, castles etc.)	46 %
Shopping (city mall, souvenirs, handicrafts etc.)	40 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	38 %
Visiting leisure attractions (theme parks, escape rooms etc.)	38 %
Guided tours / Excursions	35 %
Spa/wellness activities	32 %
Attending events (concerts, theatre, dance show, sports etc.)	27 %
Exploring the city's nightlife (i.e. bars, nightclubs)	23 %
Educational activities (workshops, lectures, talks etc.)	17 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	16 %
Activities for children	14 %

AGE

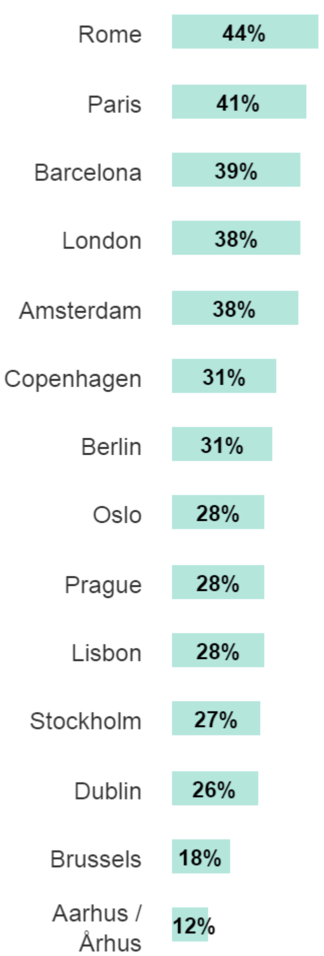
18-34yo	40%
35-49yo	33%
50-75yo	27%

TCI Research
Travel Competitive Intelligence

WONDERFUL COPENHAGEN

ITALIANS OPEN TO COPENHAGEN (N=216)

LIKELYHOOD TO VISIT



CITY TRAVEL ACTIVATORS

A significant decrease in Corona virus cases at destination	59 %
Flexible booking, which can be cancelled or modified at no cost	59 %
The development of more effective treatment for the Corona virus	53 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	44 %
Completed Corona virus vaccination for me and my friends / family traveling with me	38 %
An attractive offer (discounts on flights / accommodation)	34 %
More flights available to the cities I want to visit	9 %
Friends or family expressing a desire to travel abroad on a city break	6 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	3 %

THEY WOULD STAY IN...

Hotel	81%
Airbnb or other private rentals	33%
Holiday home/cottage	28%
Friends/relatives' home	15%
Hostel	7%
Camping	7%

ACTIVITIES TO PROMOTE

Visiting cultural attractions (museums, historical sites, castles etc.)	67 %
Taking gastronomic activities (restaurants, cafés and food markets)	60 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	56 %
Guided tours / Excursions	52 %
Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	51 %
Shopping (city mall, souvenirs, handicrafts etc.)	42 %
Visiting leisure attractions (theme parks, escape rooms etc.)	32 %
Spa/wellness activities	32 %
Exploring the city's nightlife (i.e. bars, nightclubs)	31 %
Attending events (concerts, theatre, dance show, sports etc.)	26 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	19 %
Activities for children	15 %
Educational activities (workshops, lectures, talks etc.)	13 %

AGE

DUTCH OPEN TO COPENHAGEN (N=136)

LIKELYHOOD TO VISIT

Berlin	43%
London	40%
Amsterdam	38%
Rome	35%
Barcelona	33%
Copenhagen	32%
Dublin	31%
Prague	30%
Brussels	29%
Paris	27%
Stockholm	27%
Oslo	26%
Lisbon	26%
Aarhus / Århus	15%

CITY TRAVEL ACTIVATORS

An attractive offer (discounts on flights / accommodation)	52 %
Flexible booking, which can be cancelled or modified at no cost	48 %
A significant decrease in Corona virus cases at destination	34 %
Completed Corona virus vaccination for me and my friends / family traveling with me	31 %
The development of more effective treatment for the Corona virus	24 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	21 %
Friends or family expressing a desire to travel abroad on a city break	17 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	10 %
More flights available to the cities I want to visit	10 %

THEY WOULD STAY IN...

	%
Hotel	79%
Holiday home/cottage	42%
Airbnb or other private rentals	31%
Friends/relatives' home	18%
Camping	16%
Hostel	13%

ACTIVITIES TO PROMOTE

Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	59 %
Shopping (city mall, souvenirs, handicrafts etc.)	54 %
Visiting cultural attractions (museums, historical sites, castles etc.)	51 %
Visiting leisure attractions (theme parks, escape rooms etc.)	48 %
Taking gastronomic activities (restaurants, cafés and food markets)	46 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	46 %
Guided tours / Excursions	40 %
Exploring the city's nightlife (i.e. bars, nightclubs)	26 %
Attending events (concerts, theatre, dance show, sports etc.)	25 %
Spa/wellness activities	24 %
Educational activities (workshops, lectures, talks etc.)	17 %
Activities for children	13 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	13 %

AGE

18-34yo	48%
35-49yo	25%
50-75yo	27%

NORWEGIANS OPEN TO COPENHAGEN (N=213)

LIKELYHOOD TO VISIT

Copenhagen	52%
Oslo	48%
London	41%
Rome	30%
Barcelona	28%
Stockholm	27%
Prague	26%
Paris	24%
Aarhus / Århus	23%
Berlin	23%
Amsterdam	22%
Dublin	21%
Brussels	19%
Lisbon	18%

CITY TRAVEL ACTIVATORS

Flexible booking, which can be cancelled or modified at no cost	37 %
A significant decrease in Corona virus cases at destination	33 %
An attractive offer (discounts on flights / accommodation)	33 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	33 %
Completed Corona virus vaccination for me and my friends / family traveling with me	33 %
The development of more effective treatment for the Corona virus	20 %
Friends or family expressing a desire to travel abroad on a city break	15 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	15 %
More flights available to the cities I want to visit	11 %

THEY WOULD STAY IN...

Hotel	87%
Airbnb or other private rentals	26%
Friends/relatives' home	19%
Holiday home/cottage	17%
Hostel	12%
Camping	11%

ACTIVITIES TO PROMOTE

Taking gastronomic activities (restaurants, cafés and food markets)	49 %
Shopping (city mall, souvenirs, handicrafts etc.)	48 %
Visiting cultural attractions (museums, historical sites, castles etc.)	45 %
Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	41 %
Visiting leisure attractions (theme parks, escape rooms etc.)	40 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	38 %
Attending events (concerts, theatre, dance show, sports etc.)	28 %
Exploring the city's nightlife (i.e. bars, nightclubs)	27 %
Guided tours / Excursions	23 %
Spa/wellness activities	22 %
Activities for children	14 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	12 %
Educational activities (workshops, lectures, talks etc.)	10 %

AGE

18-34yo	33%
35-49yo	33%
50-75yo	34%

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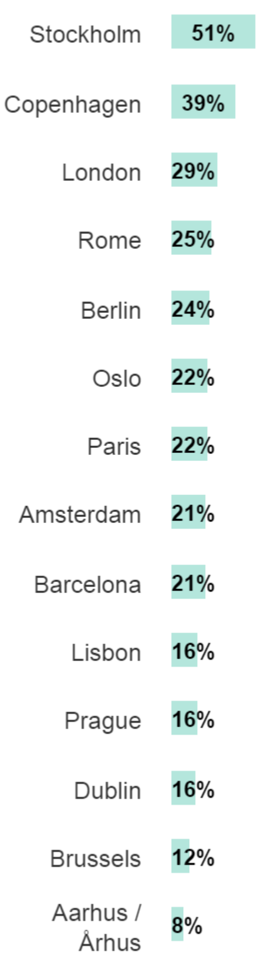
Travel Competitive Intelligence

WONDERFUL COPENHAGEN

SWEDISH OPEN TO COPENHAGEN (N=186)

LIKELYHOOD TO VISIT



CITY TRAVEL ACTIVATORS

Completed Corona virus vaccination for me and my friends / family traveling with me	40 %
A significant decrease in Corona virus cases at destination	38 %
The development of more effective treatment for the Corona virus	33 %
An attractive offer (discounts on flights / accommodation)	33 %
Flexible booking, which can be cancelled or modified at no cost	33 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	30 %
Friends or family expressing a desire to travel abroad on a city break	20 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	8 %
More flights available to the cities I want to visit	5 %

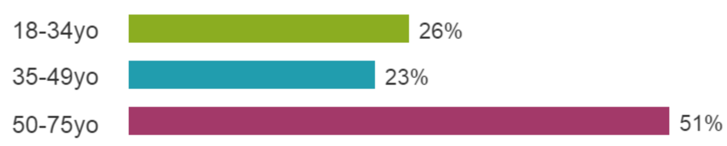
THEY WOULD STAY IN...

Hotel	90%
Friends/relatives' home	34%
Airbnb or other private rentals	22%
Holiday home/cottage	17%
Hostel	10%
Camping	9%

ACTIVITIES TO PROMOTE

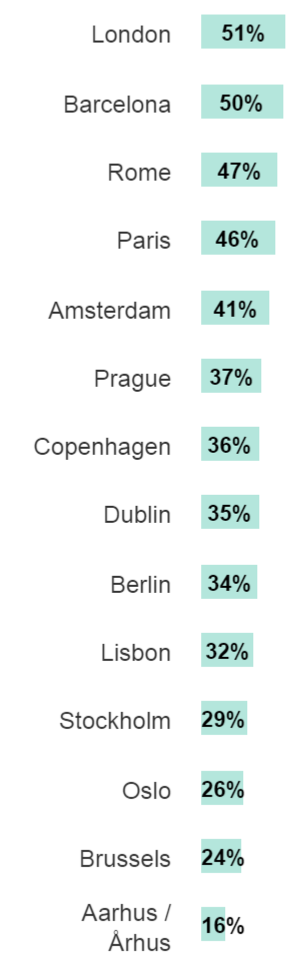
Taking gastronomic activities (restaurants, cafés and food markets)	61 %
Visiting cultural attractions (museums, historical sites, castles etc.)	60 %
Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	58 %
Shopping (city mall, souvenirs, handicrafts etc.)	55 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	52 %
Visiting leisure attractions (theme parks, escape rooms etc.)	44 %
Guided tours / Excursions	42 %
Spa/wellness activities	32 %
Attending events (concerts, theatre, dance show, sports etc.)	30 %
Exploring the city's nightlife (i.e. bars, nightclubs)	28 %
Activities for children	16 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	12 %
Educational activities (workshops, lectures, talks etc.)	10 %

AGE



BRITISH OPEN TO COPENHAGEN (N=147)

LIKELYHOOD TO VISIT



CITY TRAVEL ACTIVATORS

Flexible booking, which can be cancelled or modified at no cost	60 %
Stable rules and regulations in relation to travelling abroad (restrictions, quarantine policies, mandatory tests etc.)	60 %
A significant decrease in Corona virus cases at destination	50 %
An attractive offer (discounts on flights / accommodation)	40 %
The development of more effective treatment for the Corona virus	30 %
Completed Corona virus vaccination for me and my friends / family traveling with me	30 %
Friends or family expressing a desire to travel abroad on a city break	20 %
More flights available to the cities I want to visit	10 %
Recommendations from friends / family who have travelled during / after the Corona virus outbreak	0 %

THEY WOULD STAY IN...

	%
Hotel	89%
Airbnb or other private rentals	39%
Holiday home/cottage	34%
Friends/relatives' home	22%
Camping	16%
Hostel	12%

ACTIVITIES TO PROMOTE

Visiting cultural attractions (museums, historical sites, castles etc.)	56 %
Shopping (city mall, souvenirs, handicrafts etc.)	50 %
Nature / outdoor activities (hiking, swimming, fishing, sailing, etc.)	48 %
Taking gastronomic activities (restaurants, cafés and food markets)	45 %
Visiting leisure attractions (theme parks, escape rooms etc.)	44 %
Experiencing the locals' lifestyle (e.g. looking for the "hidden" local places…)	44 %
Attending events (concerts, theatre, dance show, sports etc.)	41 %
Guided tours / Excursions	34 %
Exploring the city's nightlife (i.e. bars, nightclubs)	29 %
Spa/wellness activities	25 %
Digital cultural activities (theater streamed online, digital museum tours etc.)	25 %
Activities for children	21 %
Educational activities (workshops, lectures, talks etc.)	16 %

AGE