

Coronavirus consumer sentiment testing in France and Germany

Summary of key findings

6 August 2020

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Methodology:

- Markets: France and Germany
- Online survey: 15 mins. survey length, sample of 500 respondents per market, fieldwork from 16-20 July 2020
Nationally representative sample as the starting point, respondents had to intend to holiday abroad in the next 6 months to qualify
Those defined as “open to Britain in the next 12 months” include respondents who stated they
 - intend to visit in the next 7-12 months, or
 - intend to visit in the next 6 months, or
 - already booked future visit to destination.Combined they make up a sample of 109 respondents France and 112 in Germany
- Focus groups on 15, 16 and 20 July 2020
8 holiday makers intending to go on holiday abroad in the next 6 months to qualify
- Carried out by VisitBritain and OMD

Executive summary of the key findings (1/2)

Among those who intend to go on a holiday abroad in the next 6 months, net intend to visit Britain stood at 12% of French and 11% of German respondents which means it ranks joint third in the French and second in the German market.

Those respondents who have a connection to Britain – be that through previous visitation or knowing family or friends who reside in Britain – are more likely to consider a holiday in Britain in the near future.

More than three in five respondents who are open to visiting Britain in the next 12 months said they are likely to take a plane for going on holiday in the next six months, followed by their private vehicle or the train. More than one in five of the French consider taking the ferry or a hire car, almost one in five of the Germans to go on holiday by coach.

About two in five respondents who are open to travel to Britain over the course of the next 12 months are aged 18-34, and more than one in four are in the age group of 34-44 showing a strong representation of younger age groups.

More than half of respondents open to Britain as a destination among the French and more than three in five among the Germans stated that they take on average two to three trips abroad per year, which makes them frequent travellers.

About half of the Germans and French who are open to Britain, stated that they would most likely travel with their partner, almost half of the French and more than a third of the Germans are likely to travel as a family with children.

Most of those open to visiting Britain show a high propensity to book directly with the provider, while about a third are likely to book online via a travel agent/tour operator or price comparison website.

Executive summary of the key findings (2/2)

Hotel/guest houses are, on average, the most likely accommodation option for those open to holidaying in Britain

Factors which are important for taking a decision for a holiday in the next 6 months for those open to visiting Britain in the next 12 months: Reassurance about health and safety is key as in both markets factors that fall into this category were among the most important for the respondents' decision to go on holiday abroad in the next six months. Advice from governments in France and Germany respectively, and in the holiday destination also featured highly as well as the flexibility of booking terms. Welcome from locals is important, too.

The findings also indicate that a destination for a culture trip was considered as quite important and Britain might be able to leverage the strong draw its culture has in normal times also during the recovery from the pandemic.

For the French curiosity prevails as, on average, a new holiday destination featured highest up in the factors of importance. The French who are open to Britain over-index on the following factors when compared to the general sample in the market: city breaks, road trips, a destination close to home and a familiar holiday destination.

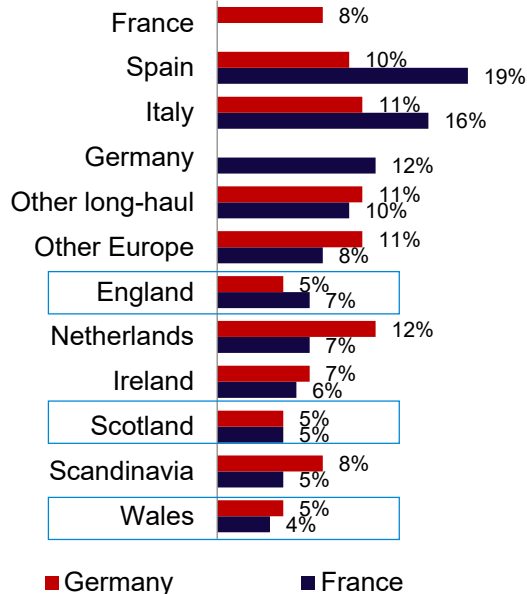
The Germans who are open to Britain over-index on the following factors when compared to the general sample in the market: city breaks, road trips, a destination close to home and a familiar holiday destination.

Offering a variety of experiences and a mix of unknown or lesser known and iconic British places or activities performed best among the French and German respondents. Providing experiences in nature or with a cultural angle were welcome. Respondents were asking for information about what the customer experience now looks like with health & safety precautions and how it can still be fun.

The ease of travel during the transition period is also important to highlight as some respondents were confused.

Tough competition to attract those who consider holidaying abroad

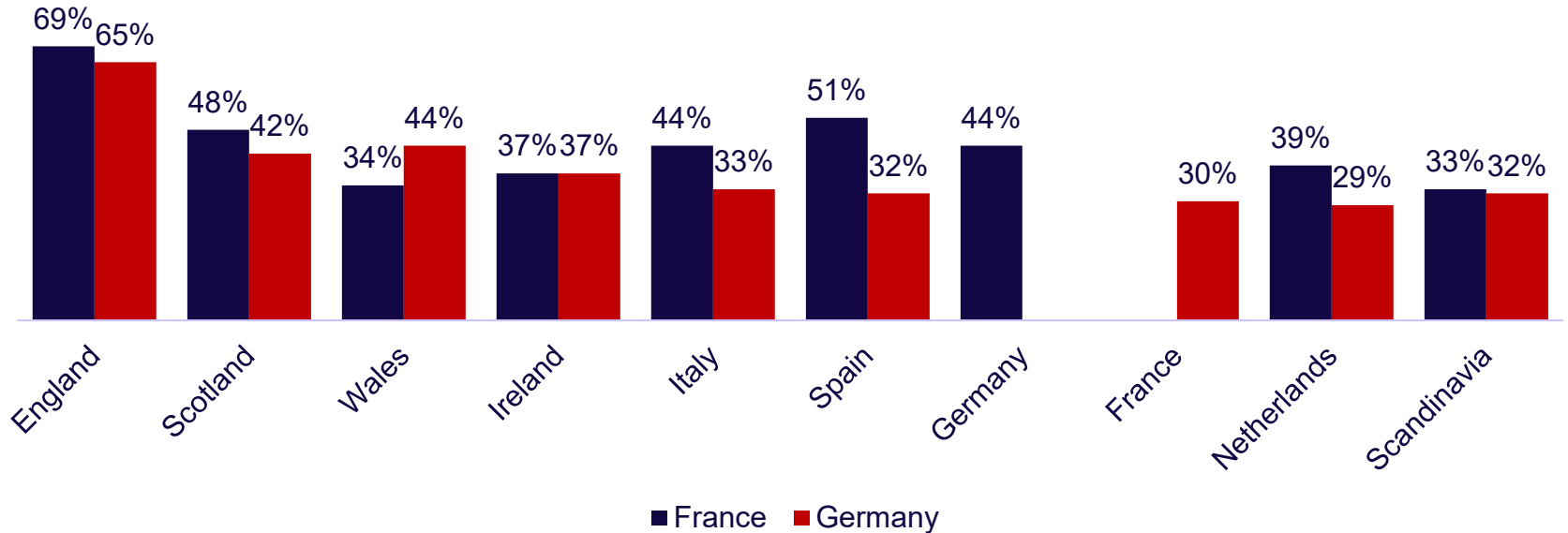
Destinations intending on visiting in the next 6 months:
(including those already booked)



- Interest in staycations is very high among German and French audiences this year. Britain finds itself in tough competition with other destinations. While British nations individually are among the lesser considered destinations, combined they fare better.
- Net intention of visiting Britain on holiday in the next six months stood at 12% in the French audience and at 11% among German respondents. This means for the French, Britain ranks joint third with Germany behind Spain and Italy. For the Germans, Britain ranks second behind the Netherlands, ahead of Spain – albeit by small margins.
- Those with a connection to Britain from previous visitation or knowing friends or family who reside in Britain were more likely to consider visitation in the near future.

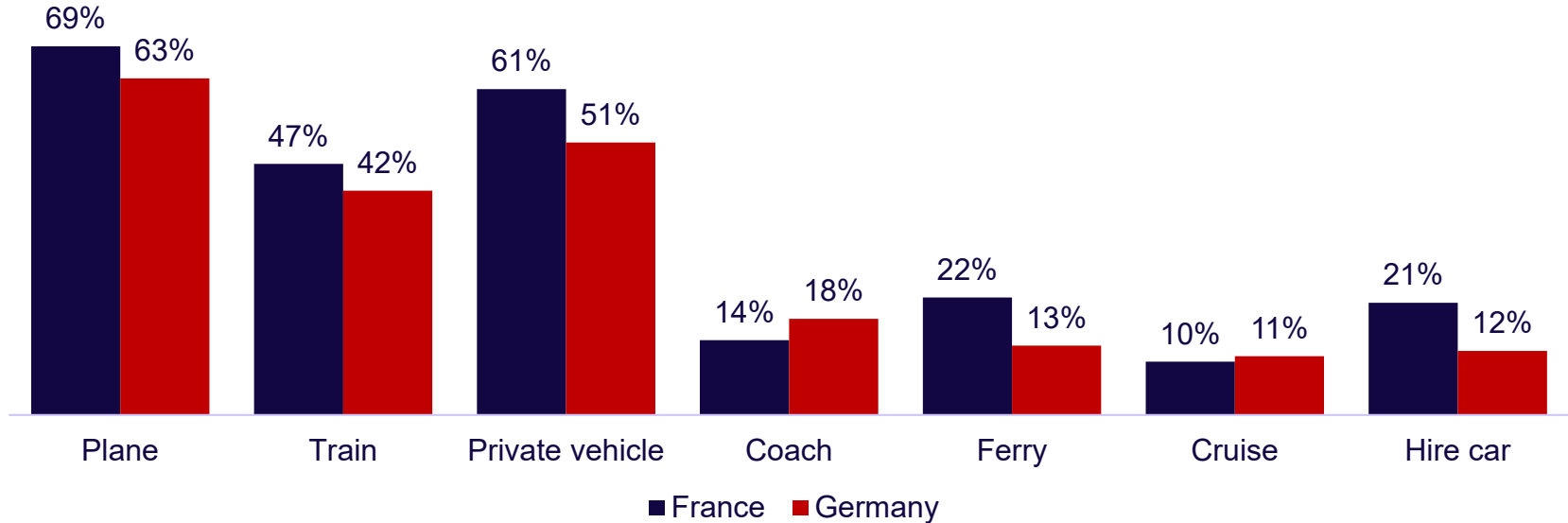
Destinations abroad considered for a holiday

Destinations abroad considered by those open to Britain in the next 12 months



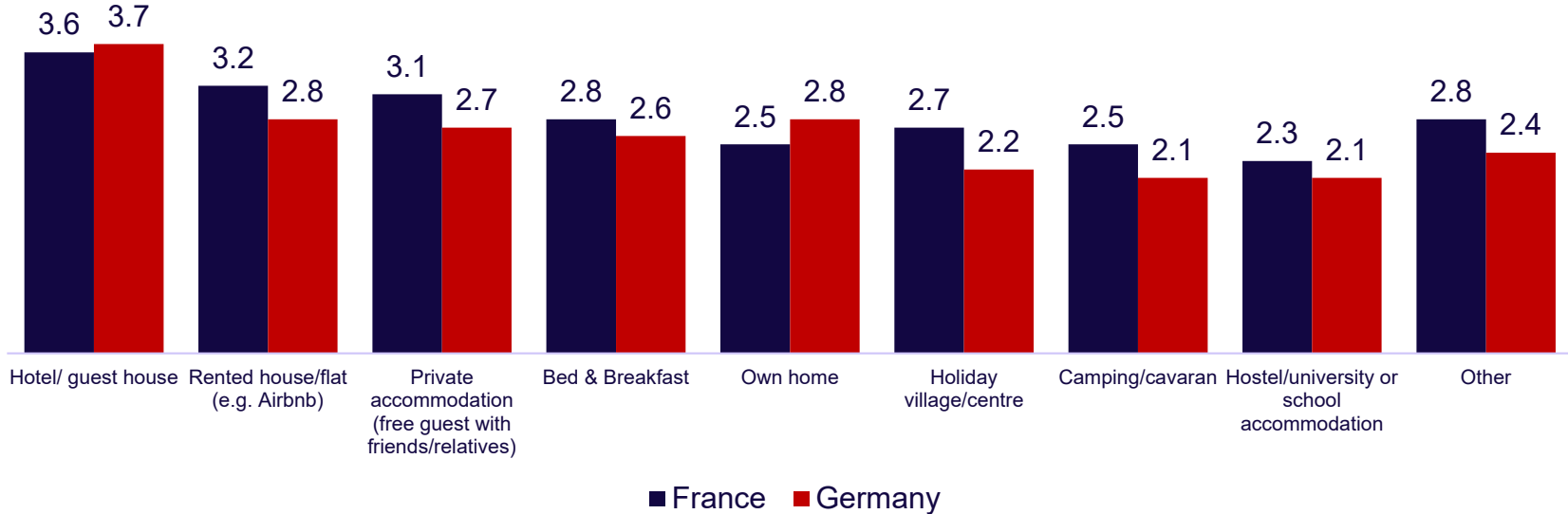
Plane, private vehicle and train are the most considered modes

Modes of transport considered by those open to Britain in the next 12 months



Hotels/guest houses remain the most considered type of accommodation

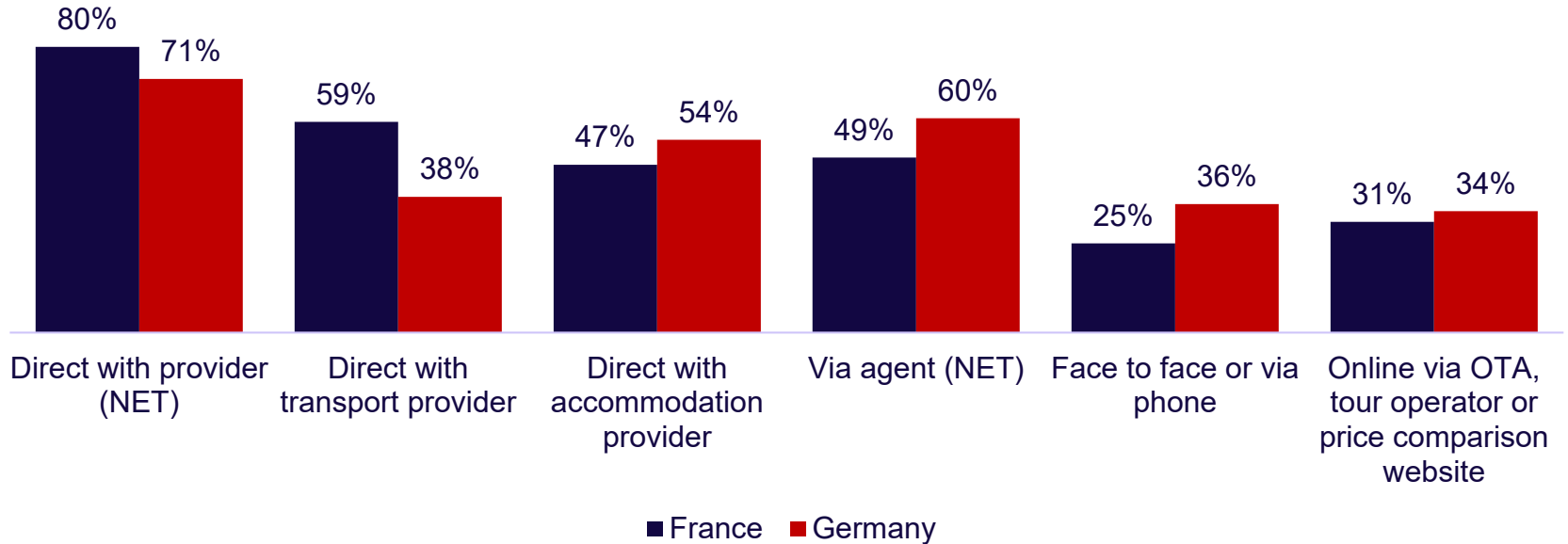
Type of accommodation considered by those open to Britain in the next 12 months (average)



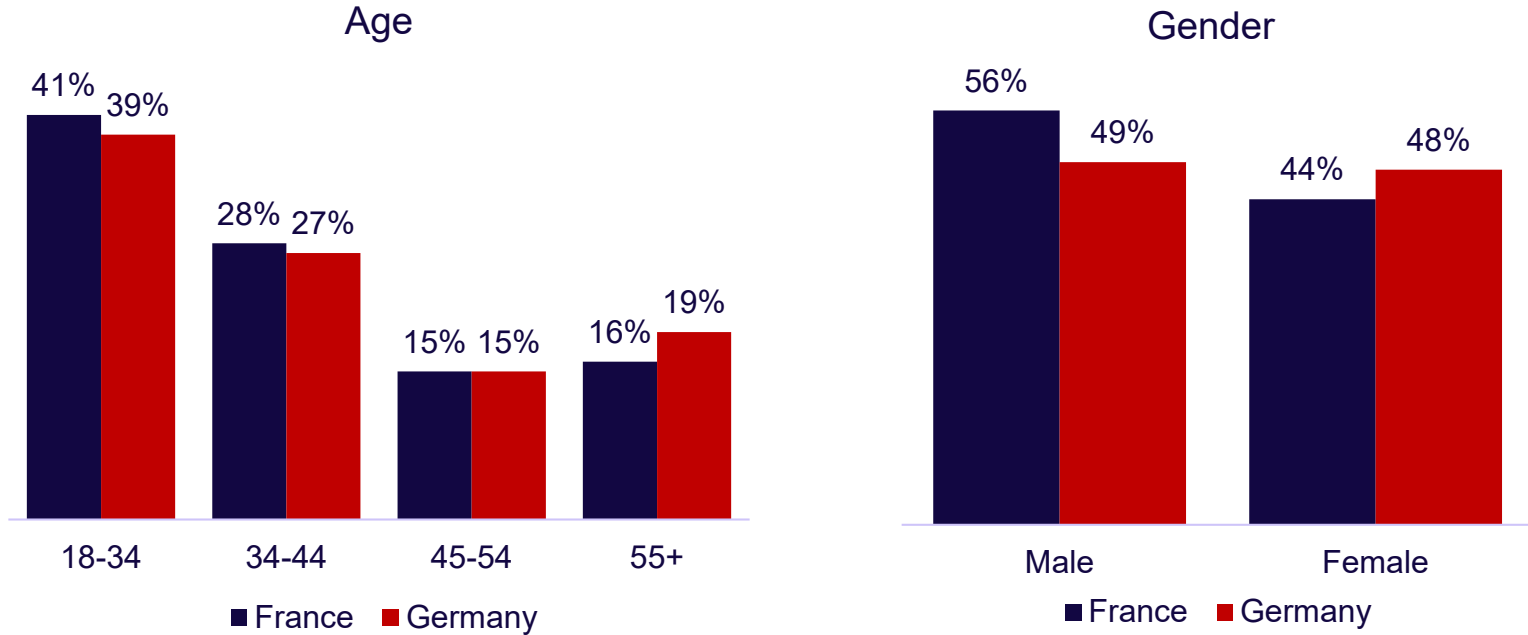
Source: VisitBritain/OMD July 2020, Q9. Which type of accommodation might you be likely to stay in on a holiday abroad in the next 6 months? (multiple answers permitted) Base: Those intending on holidaying overseas in the next 6 months and open to Britain in the next 12 months, Scale: Very unlikely =1 to Very likely=5

High propensity to book directly with the provider

Booking channels considered by those open to Britain in the next 12 months

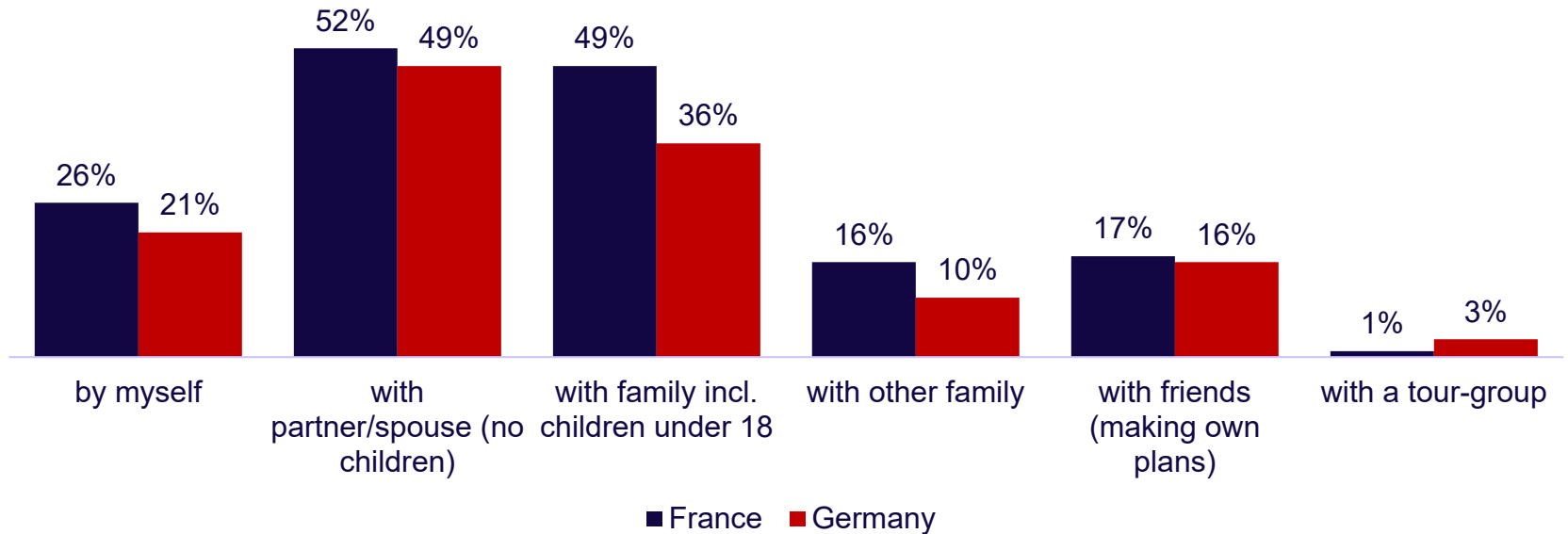


The younger age group has a higher propensity to travel in the short term

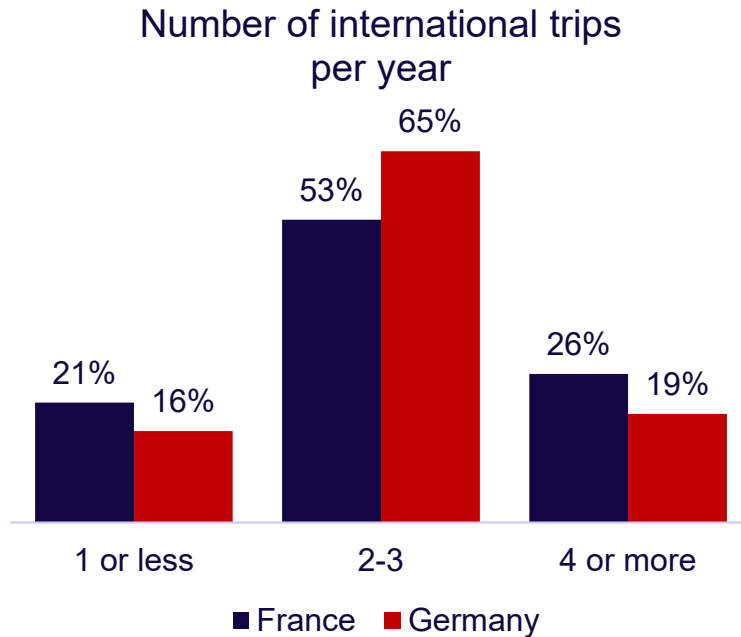


Most expect to travel as a couple or family with children

Travel partners of those open to Britain in the next 12 months



Multiple trips abroad per year, are common among those open to Britain



Most important factors for going on holiday among the French



- Curiosity about a new destination prevails, and reassurance around health and safety, hygiene in particular, are key.
- Flexibility of booking terms is essential and welcome from locals is important.
- Many French show a need for official travel advice and information.
- Culture remains a key draw.
- Those open to Britain also slightly over-index for city breaks and road trips, destinations close to home, and a familiar holiday destination.

Most important factors for going on holiday among the Germans

Most important factors for going on holiday in the next 6 months (average)



- German respondents put high importance on health and safety, and need official travel advice.
- Flexibility of booking terms essential.
- Welcome from locals is important
- Those open to Britain also slightly over-index for culture trips, city trips, visiting friends/relatives, road trips, and a destination close to home.

Source: VisitBritain/OMD July 2020, Q8. Please indicate how important each of the following are for your decision to holiday abroad in the next 6 months; Base: Those intending on holidaying overseas in the next 6 months and open to Britain in the next 12 months, Average where Very Important=7, and Not Important at all=1

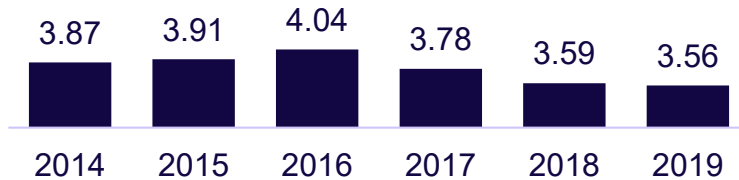


Appendix:
Market performance in 2019 for context

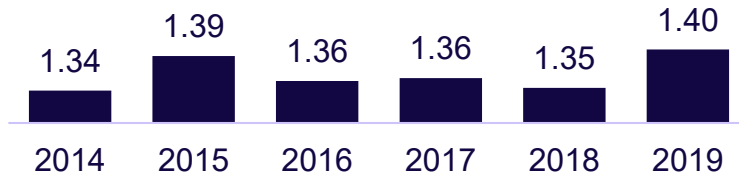
Based on International Passenger Survey
by ONS

Context: Market performance in 2019: France

Visits to the UK (million)



Visitor spend in the UK (£ billion)



France is the second most valuable inbound visitor market to the UK in the European set, fourth most valuable globally with visitor spending of £1.4bn in 2019.

It ranked first for volume among European markets, second for volume globally with 3.6m visits in 2019.

There were 921,000 visits from France worth a record £420m in Oct-Dec 2019.

The UK welcomed 1.5m holiday visits from France with visitor spend worth £717m in 2019.

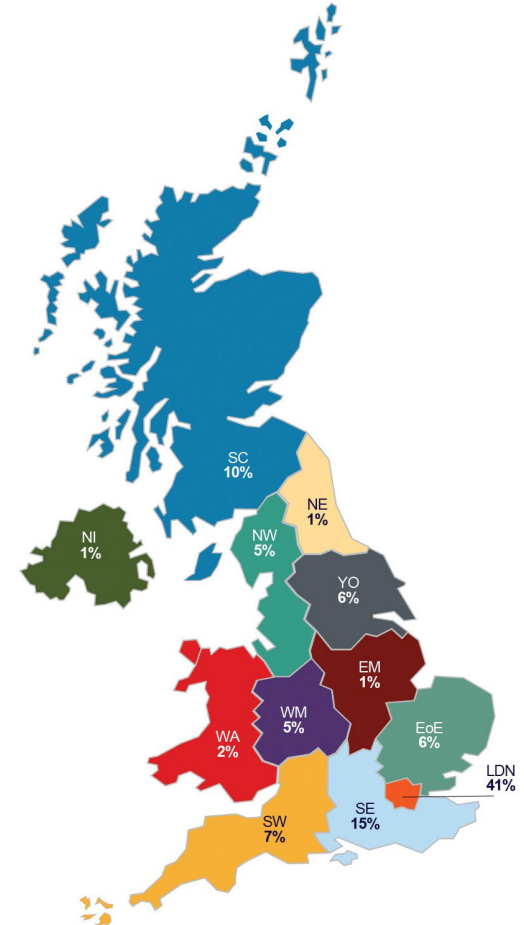
In 2019, 1.1m visits from France were made to see friends and/or relatives residing in the UK, with visitor spending worth £294m.

Regional spread of French visits to the UK in 2019

The French travel the length and breadth of the UK:

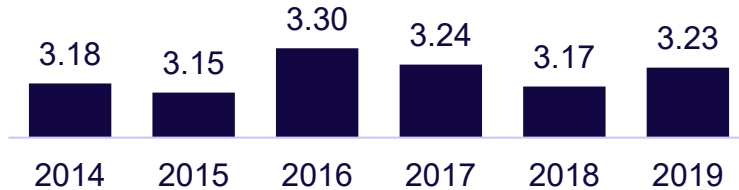
- 46% of visitor nights were spent in England outside London in 2019, 41% in London, 10% in Scotland, 2% in Wales, and 1% in Northern Ireland.
- 1.8m visits from France were made to London worth a record £762m.
- 8% of French visits were day visits in 2019.
- 45% of French visits are made by air, 39% via the Tunnel, 16% via the Channel.

Share of French visitor nights in 2019

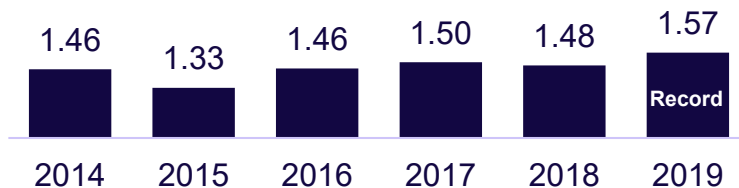


Context: Market performance in 2019: Germany

Visits to the UK (million)



Visitor spend in the UK (£ billion)



Germany is the most valuable inbound visitor market to the UK in the European set, the third most valuable globally with record spend of £1.6bn in 2019.

It ranked second for volume among European inbound source markets and third globally with 3.2m visits in the same year.

The German market set a visit volume record in Oct-Dec 2019 with 814,000 visits worth £385m.

The UK welcomed 1.5m holiday visits from Germany with record visitor spend of £863m.

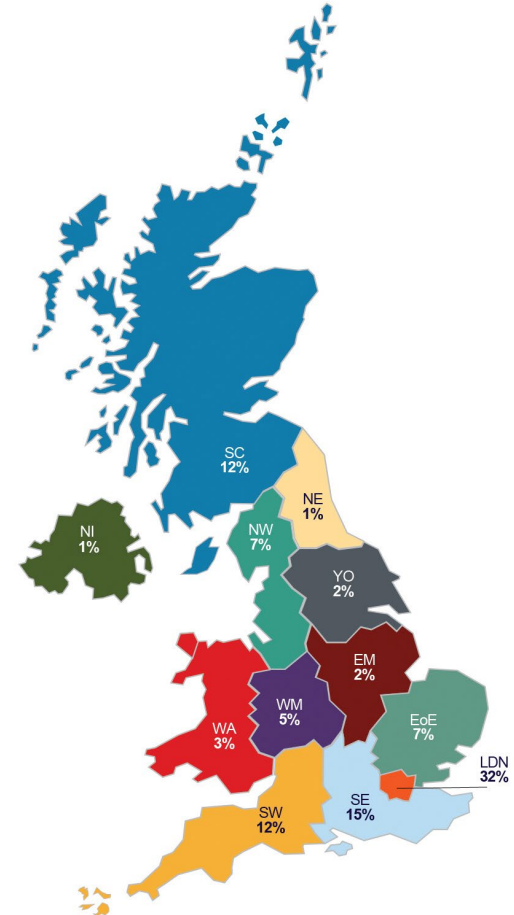
Visits to friends and/or friends residing in the UK set new volume and value records with 874m such visits worth £260m.

Regional spread of German visits to the UK in 2019

Germans travel the length and breadth of the UK:

- 51% of visitor nights were spent in England outside London in 2019, 32% in London, 12% in Scotland, 3% in Wales, and 1% in Northern Ireland.
- A record of 1.5m visits from Germany were made to London worth a record £707m.
- The North West saw a volume record of 260,000 German visits worth £81m.
- The South East saw a record for visitor spend: £201m from 515,000 visits.

Share of German visitor nights in 2019





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