Inbound COVID-19 Sentiment Tracker

Market Snapshot – Germany

Read the full report for Wave 3 here (PDF, 7.6MB)
Germany Market Summary

### Travel intentions

<table>
<thead>
<tr>
<th>Wave</th>
<th>Intending to travel abroad for leisure*</th>
<th>Visit friends or relatives</th>
<th>Other leisure purposes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>65%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>2</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>81%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Journey purpose

- **Holiday**: 91%
- **Visit friends or relatives**: 27%
- **Other leisure purposes**: 13%

### Planning stage

- **Trip booked**: 8%
- **Destination chosen**: 26%
- **Trip planned**: 33%
- **Intend to travel**: 33%

### Among leisure trip intenders:

- **78%** consider Europe
- **5%** consider Britain

### Among Britain intenders:

- **40%** consider Scotland
- **38%** consider England
- **18%** consider London
- **11%** consider Wales

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### Travel preferences

#### Top activities

- **Dining out**: 52%
- **Outdoor nature activities**: 44%
- **History and heritage**: 42%
- **Iconic tourist attractions**: 42%
- **Outdoor activities**: 39%

#### Destination types

- **31%** Large city
- **46%** Coastline
- **25%** Mountains or hills
- **26%** Will roam around
- **21%** Small/mid-sized city/town
- **17%** Country/village

#### Top Travel Companions

- With your spouse/partner: 68%
- With children (under 18): 26%
- With friends: 23%
- Alone: 20%
- With adult family members: 14%
- As part of a tour group: 1%

#### Top Accommodation

- Hotel chain: 59%
- Self catered property: 47%
- Bed and breakfast: 38%
- Friend’s/family house (free guest): 31%
- Boutique hotel: 26%

#### Top modes of transport within Britain

- Own car vehicle: 38%
- Public transport - Train: 35%
- Rent car/vehicle: 30%

#### Top modes of transport to Britain

- Plane – via nonstop flight: 80%
- Plane – via connecting flight: 67%
- Own/rented vehicle – via Channel Tunnel: 60%

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*(% definitely & probably) in the next 12 months

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated
Germany Market Summary

Top travel drivers

<table>
<thead>
<tr>
<th>...for any international trip</th>
<th>...for a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>38%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>34%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>32%</td>
</tr>
<tr>
<td>Removal of quarantine policies in home country</td>
<td>27%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>26%</td>
</tr>
</tbody>
</table>

Travel Concerns – for travel to Britain*

- Change in quarantine requirements on my return home: 53%
- Other people not following COVID-19 policies/procedures: 51%
- Access to healthcare if I contract COVID-19 abroad: 45%
- Limited / restricted experiences at destination: 45%
- Costs of mandatory COVID-19 tests: 42%
- Extra admin involved with new policy/rules during the trip: 41%
- Contracting COVID-19 during my journey/trip: 39%
- Affordability of robust travel insurance: 38%
- Accessibility of affordable air fares: 35%
- Locals’ attitude towards international tourists: 30%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test should that be required: 72% Agree, 4% No opinion, 24% Disagree

I will look for less crowded places, even if I miss attractions: 64% Agree, 6% No opinion, 30% Disagree

I will leave booking until later/last minute: 60% Agree, 7% No opinion, 33% Disagree

Booking through a travel agent is a safer option at the moment: 58% Agree, 8% No opinion, 34% Disagree

I will travel internationally as soon as I can after I get the vaccine: 56% Agree, 10% No opinion, 35% Disagree

I will favour local destinations instead of traveling internationally: 51% Agree, 6% No opinion, 43% Disagree

I will think more about sustainability when planning future holidays: 50% Agree, 11% No opinion, 39% Disagree

I would be comfortable using public transport within the destination: 49% Agree, 6% No opinion, 45% Disagree

I will favor destinations I have been before rather than new places: 44% Agree, 6% No opinion, 50% Disagree

I will be intending to take fewer but longer holidays: 33% Agree, 15% No opinion, 52% Disagree

Due to covid-restrictions, I will have more annual leave to use: 26% Agree, 11% No opinion, 64% Disagree

*% very & somewhat concerned

**% completely & somewhat agree

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