Inbound COVID-19 Sentiment Tracker

Market Snapshot – Germany

Read the full report for Wave 4 here (PDF, 8MB)

If you need the data in a different format, please contact research@visitbritain.org

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
**Germany Market Summary**

### Travel Intentions

- **Intending to travel abroad for leisure**
  - Wave 1: 65%
  - Wave 2: 67%
  - Wave 3: 81%
  - Wave 4: 87%

- **Journey purpose**
  - Holiday: 91%
  - Visit friends or relatives: 32%
  - Other leisure purposes: 16%

- **Planning stage**
  - Trip booked: Wave 1: 8%, Wave 2: 9%, Wave 3: 19%, Wave 4: 22%
  - Destination chosen: Wave 1: 26%, Wave 2: 27%, Wave 3: 27%, Wave 4: 29%
  - Trip planned: Wave 1: 33%, Wave 2: 37%, Wave 3: 31%, Wave 4: 32%
  - Intend to travel: Wave 1: 33%, Wave 2: 27%, Wave 3: 23%, Wave 4: 18%

### Among leisure trip intenders:

- 76% consider Europe
- 7% consider Britain

### Among Britain intenders:

- 45% consider Scotland
- 40% consider England
- 26% consider London
- 14% consider Wales

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**Travel Preferences**

- **Top activities**
  - Dining out: 50%
  - Outdoor nature activities: 44%
  - Outdoor activities: 43%
  - History and heritage: 42%
  - Iconic tourist attractions: 41%

- **Destination types**
  - Large city: 30%
  - Coastline: 52%
  - Mountains or hills: 22%
  - Will roam around: 30%
  - Small/mid-sized city/town: 23%
  - Country/village: 19%

- **Top Travel Companions**
  - With your spouse/partner: 70%
  - With friends: 23%
  - With children (under 18): 22%
  - Alone: 19%
  - With adult family members: 14%
  - As part of a tour group: 1%

- **Top modes of transport within Britain**
  - Own car vehicle: 41%
  - Public transport - Train: 38%
  - Public transport - Tube/subway: 36%

- **Top modes of transport to Britain**
  - Plane – via nonstop flight: 86%
  - Plane – via connecting flight: 68%
  - Own/rented vehicle – via Channel Tunnel: 60%

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

Top travel drivers

...for any international trip

Money-back guarantee should I wish to cancel my trip 39%
Removal of quarantine policies in destination country 34%
Stable political environment in destination country 30%
Removal of quarantine policies in home country 26%
Decrease in coronavirus cases at destination 26%

...for a trip to Britain

Money-back guarantee should I wish to cancel my trip 30%
Removal of quarantine policies in destination country 25%
Assurance that there will be a range of/ enough things to do at destination 22%
Decrease in coronavirus cases at destination 20%
An attractive offer e.g. discounts on flights or accommodation 19%

Travel Concerns – for travel to Britain*

Change in quarantine requirements on my return home 48%
Limited / restricted experiences at destination 46%
Other people not following COVID-19 policies/procedures 46%
Access to healthcare if I contract COVID-19 abroad 44%
Contracting COVID-19 during my journey/trip 40%
Accessibility of affordable air fares 39%
Affordability of robust travel insurance 36%
Costs of mandatory COVID-19 tests 35%
Extra admin involved with new policy/rules during the trip 34%
Locals’ attitude towards international tourists 25%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test should that be required 81%
I will look for less crowded places, even if I miss attractions 66%
I will favour international destinations closer to my home country 61%
Booking through a travel agent is a safer option at the moment 60%
I would be comfortable using public transport within the destination 56%
I will think more about sustainability when planning future holidays 56%
I will leave booking until later/last minute 55%
I will delay my next international trip until Omicron is under control 46%
I will favour destinations I have been before rather than new places 46%
I will favour local destinations instead of traveling internationally 42%
I will be intending to take fewer but longer holidays 39%

*% very & somewhat concerned
**% completely & somewhat agree

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated