

Future of Travel – Germany

IPSOS / EUROP ASSISTANCE BAROMETER

3rd JULY, 2020



METHODOLOGY GERMANY



Sample

In Germany, the survey was conducted on a representative sample of each the population, aged 18 years and older, put together using the quota method (gender, age, profession) after stratification by region and by city size.



Timeline

The field studies were carried out between June 16th and June 24th 2020



Method of data collection

Online survey

GERMANY



INTEND TO GO ON HOLIDAYS IN 2020

72%

Vs Europe 81%

HOLIDAYS IN THEIR OWN COUNTRY 68%

Vs Europe 77%

HOLIDAYS ABROAD 31%

Vs Europe 35%

HOLIDAY PREFERENCES*

Beach holidays 28%



BUDGET* €1,583

Vs Europe €1,604

MODES OF TRANSPORTATION

SUMMER 2020

OWN CAR 69%

PLANE 17%

TRAIN 16%

TOTAL 2020-2021

OWN CAR 60%

PLANE 22%

TRAIN 18%

ACCOMODATION

HOTEL 48%

PRIVATE RENTALS 30%

GUEST-HOUSE 12%

INSURANCE COVERAGE

IN THE PAST 45%

Vs Europe 51%

IN THE FUTURE 46%

Vs Europe 51%

GAME CHANGERS



1. IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION





CONTEXT

CONCERNED FOR HEALTH

One's health / his/her family health

53%

ECONOMIC IMPACT

Dismissed from his /her job / Decrease of work activity /
Loss of a part of revenue

31%

GOT SICK / IMPACTED BY COVID-19

Oneself or family

7%

A1. Are you concerned about the following regarding COVID-19?

Base : All

A3. Which of the following, if any, has happened to you as a result of COVID-19?

Base : All

A2. Which of the following has happened to you as a result of COVID-19?

Base : All

2.

TRAVELLING IN A POST-COVID WORLD



INTENT TO TRAVEL IN 2020



GERMANY

HOLIDAY PLANS IN 2020

72%

Will *certainly or probably* travel...



European
Average

81%

INCLUDING

33%

who will *certainly* travel...

68%
...inside the country



31%
...abroad



28%
...inside the country



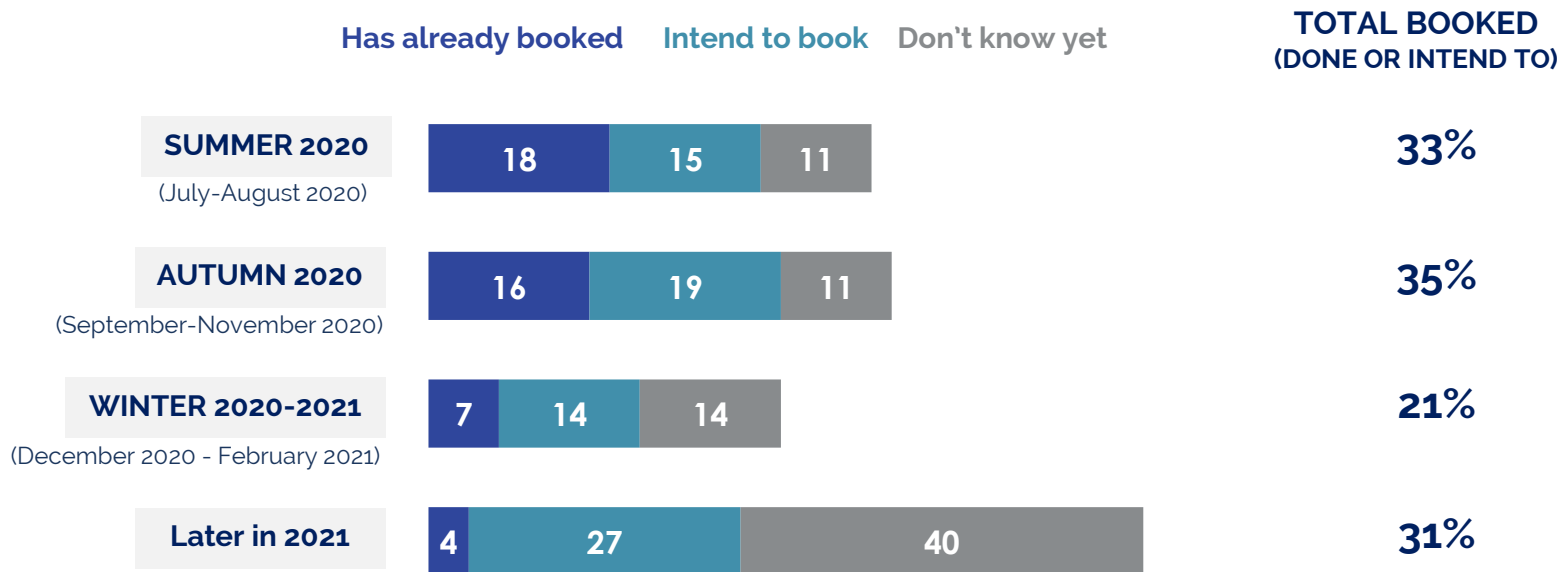
12%
...abroad



INTENT TO TRAVEL PER PERIOD



Despite a great will to travel (i.e previous page), a huge uncertainty remains regarding the future travels: **many respondents don't know if they are going to book holidays in the coming months, or don't book anything**



C4. Have you made some travel reservations for the following period(s)? Yes, you booked a trip(s) before the lock-down/Yes, you booked a trip(s) during the lock-down/Yes, you booked a trip(s) after the lock-down/You haven't booked a trip(s) yet, but you intend to /You won't travel during this period/You booked a trip but it's been cancelled by the company/agency/You don't know yet

Base : All



MAIN TRIP BUDGET IN 2020/2021

AVERAGE IN GERMANY

€ 1,583

Vs European Average

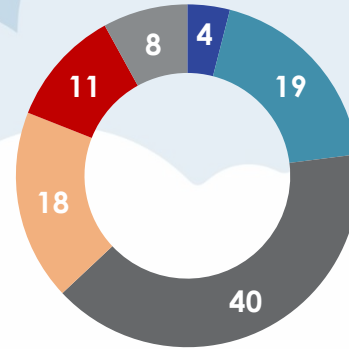
€ 1,604

Vs Germany Summer Holiday Barometer 2019

€ 2,467

**DECREASED
29%**

**INCREASED
23%**



Increase a lot Increase slightly Stay as usual Decrease slightly Decrease a lot DK

C13. What do you consider as your full budget for your next main trip?
Base : Intend to travel in 2020/2021

C12. How might your budget for your main leisure trip change? Will it:
Base : Intend to travel in 2020/2021








MAIN TRIP BUDGET – DETAIL PER COUNTRY



Exchange rate applied : 1 USD = €0,888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0,029

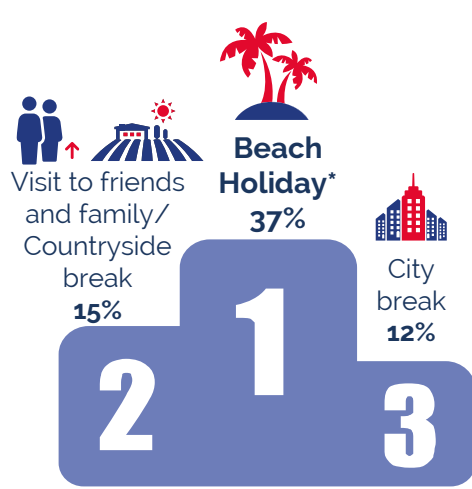
HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP



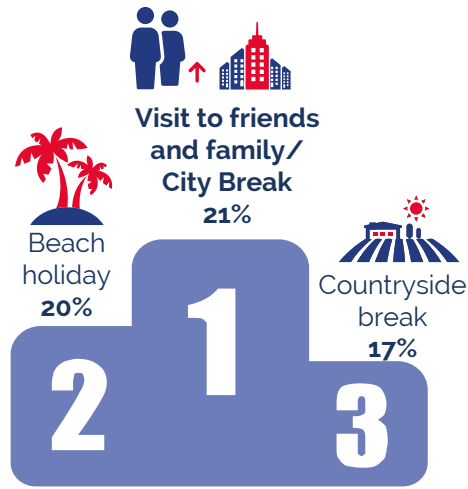
	 TOTAL IN GERMANY	 EUROPEAN AVERAGE	<i>SINGLE TRAVELERS</i>	<i>2 PEOPLE TRAVELLING</i>	<i>AT LEAST 3 PEOPLE</i>	<i>FAMILIES</i>
 Beach holiday	28%	29%	13%	27%	33%	37%
 Visit to friends and family	21%	20%	44%	20%	15%	17%
 City break	15%	12%	19%	17%	14%	10%
 Countryside break	14%	14%	8%	12%	18%	21%
 Touring holidays	7%	12%	3%	11%	6%	3%

C6. Ideally, what kind of trip are you planning ?
Base : Those who have planned a main trip (in total)

HOLIDAY PREFERENCES PER PERIOD IN 2020 FOR THE MAIN LEISURE TRIP



SUMMER 2020



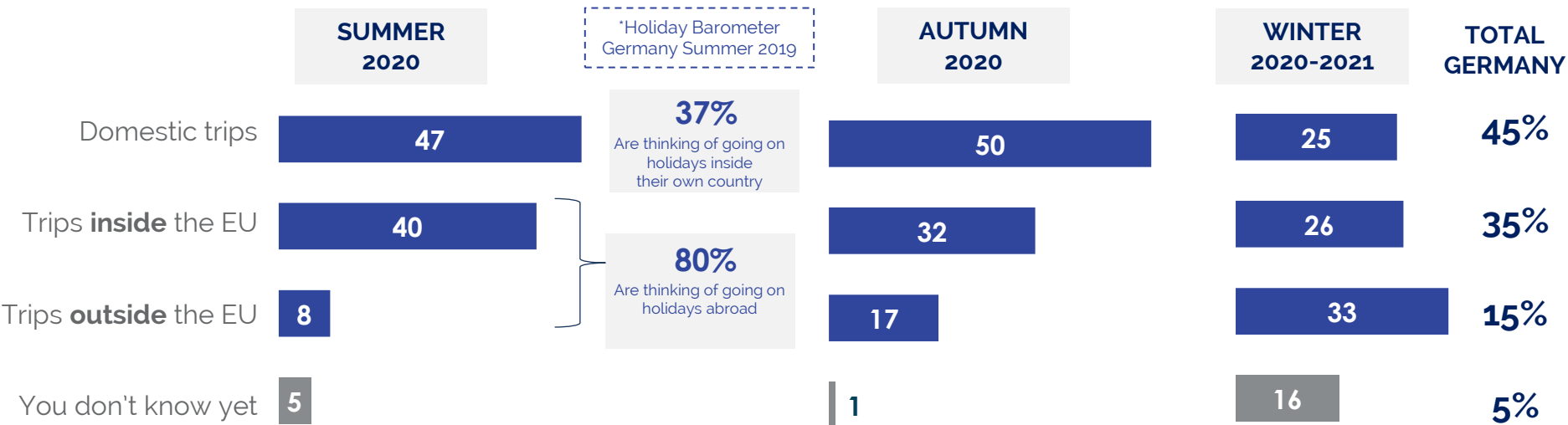
AUTUMN 2020



WINTER 2020-2021

** in the summer Holiday Barometer, seaside was also the top destination for the Germans who intended to go on summer holidays*

LOCATIONS OF TRIPS PLANNED FOR THE MAIN LEISURE TRIP IN 2020



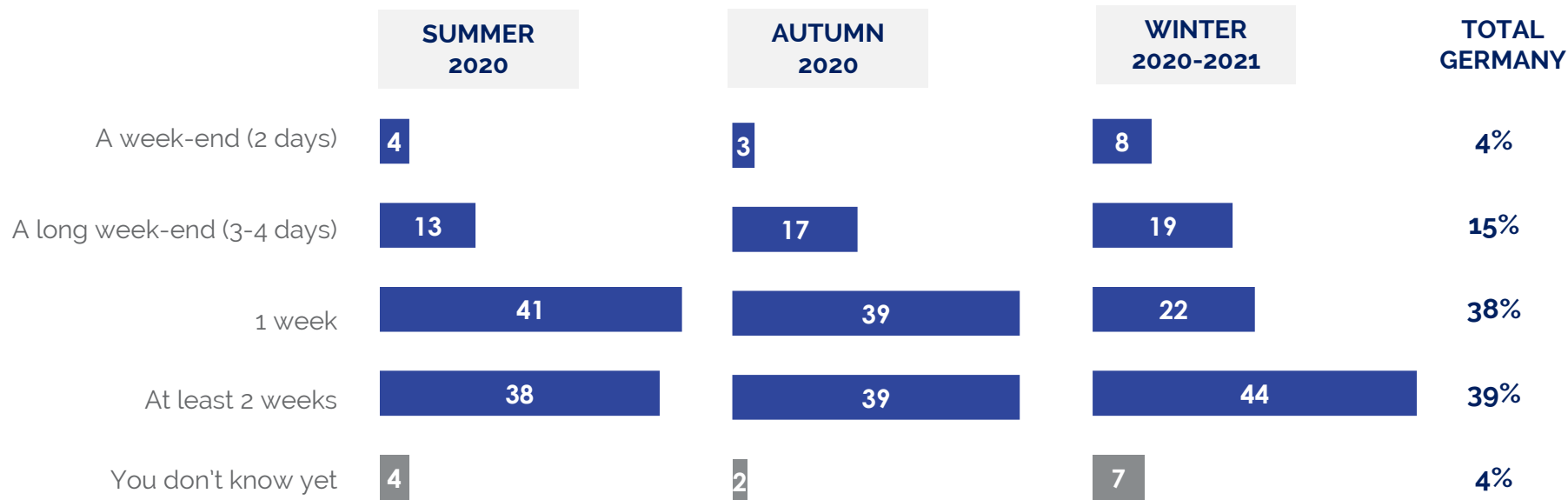
C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:

Base : Those who have planned a main trip (per period)

REMINDER FROM 2019 HOLIDAY BAROMETER : Where are you thinking of going for your holidays this summer ?

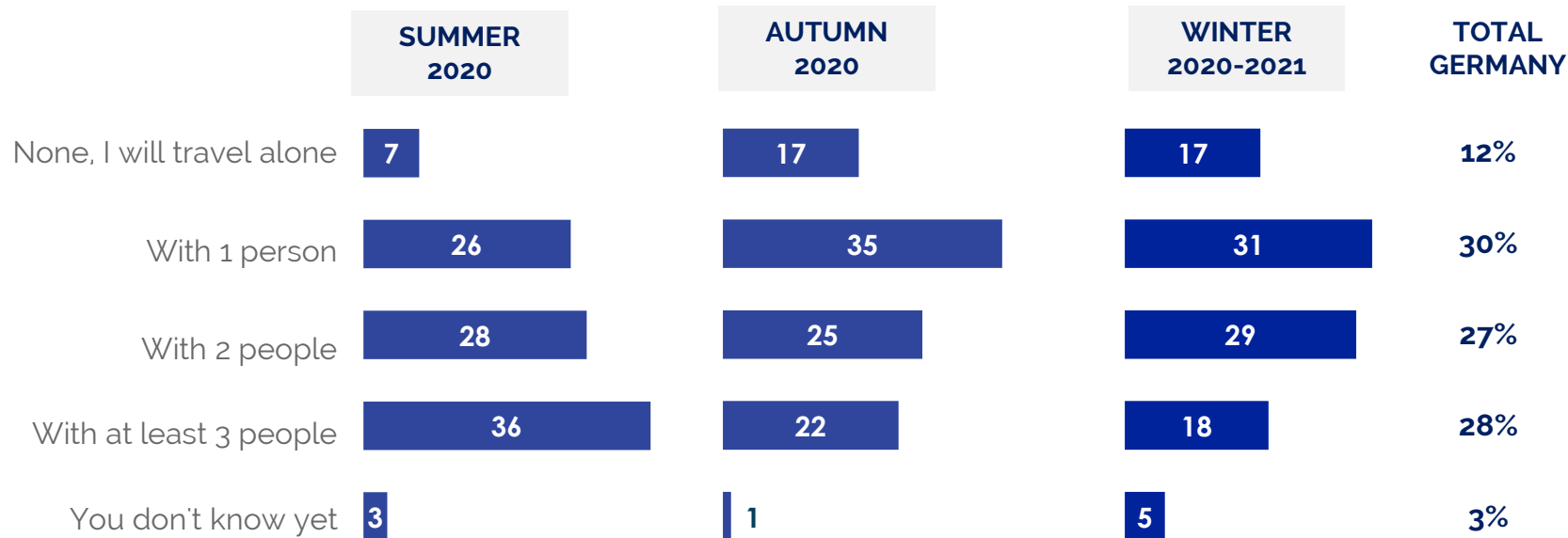
Base: Intend to go on Holiday this summer 2019

TRIPS' DURATION IN 2020 FOR THE MAIN LEISURE TRIP IN 2020



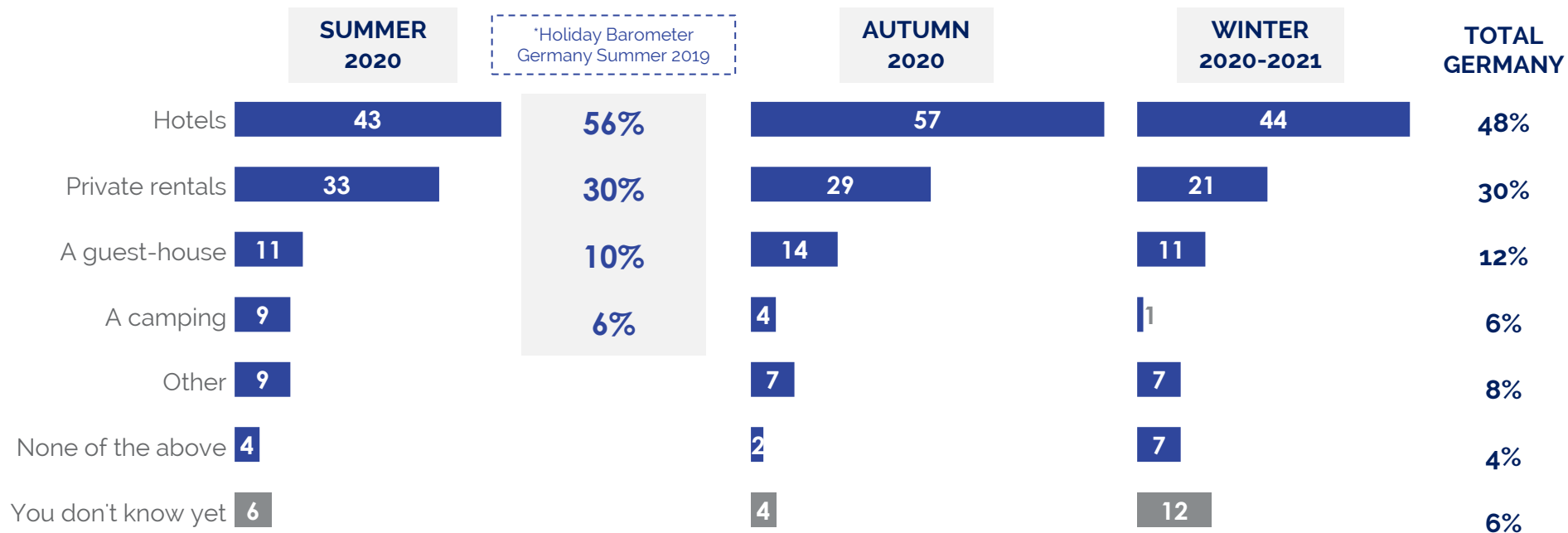
C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?
 Base : Those who have planned a main trip (per period)

NUMBER OF PEOPLE TRAVELLING TOGETHER FOR THE MAIN LEISURE TRIP IN 2020



C9. For your main leisure trip you would like to plan in SUMMER 2020 / FALL AUTUMN 2020 / WINTER 2020-2021, what is the average number of people travelling with you?
 Base : Those who have planned a main trip (per period)

TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020

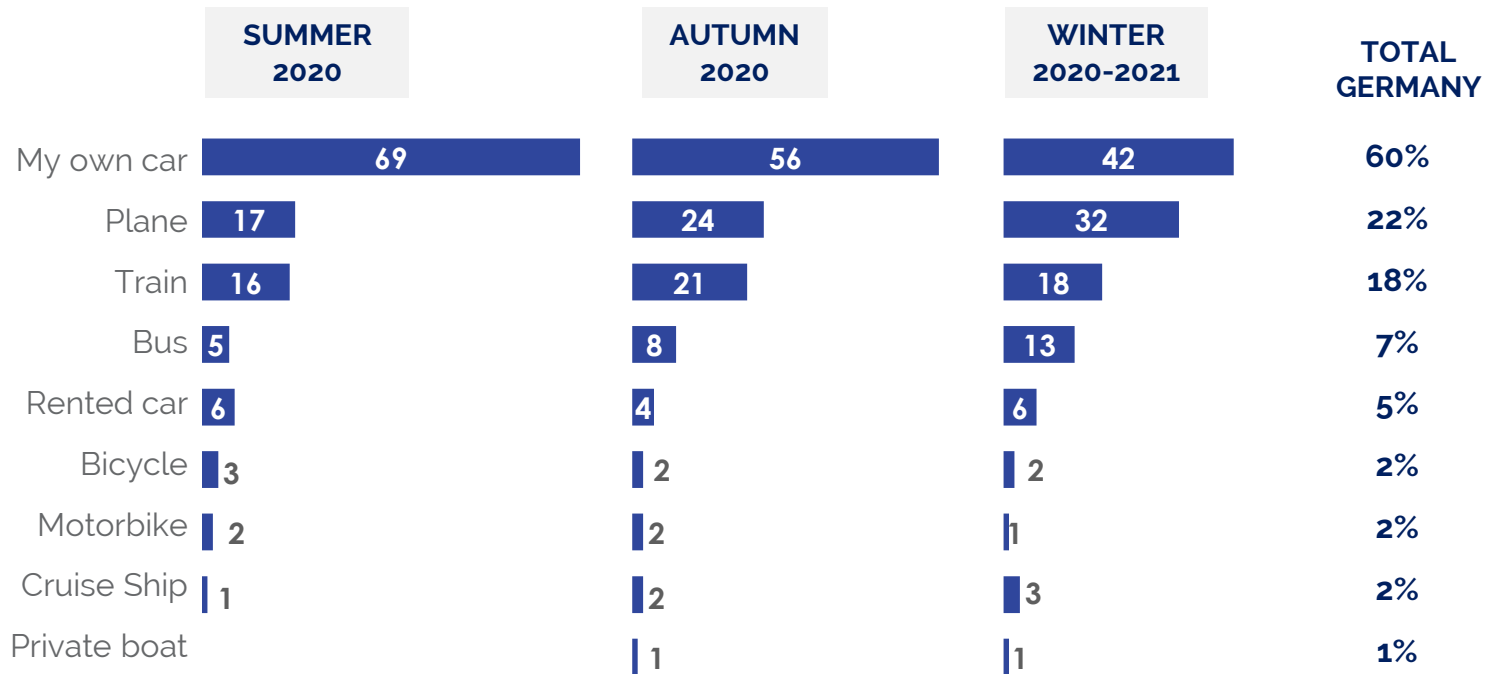


C10. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:
 Base : Those who have planned a main trip (per period)

REMINDER FROM 2019 HOLIDAY BAROMETER : Regarding your accommodations during your summer trip in 2019, do you mostly intend to
 Base: Intend to go on Holiday this summer 2019

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MODES OF TRANSPORTATION PREFERRED FOR THE MAIN LEISURE TRIP IN 2020



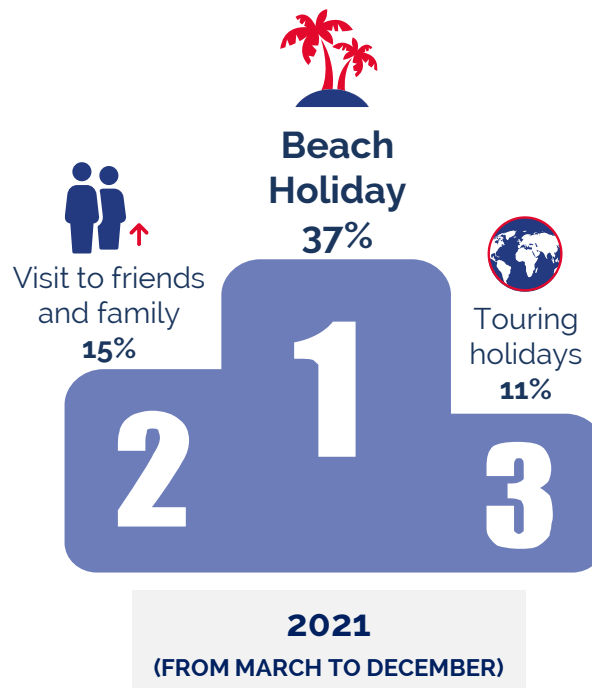
C10bis. Which mode(s) of transportation are you planning to be using in as a priority during these your main leisure trips after COVID 19 in the next months?
 Base : Those who have planned a main trip (per period)

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GAME CHANGERS



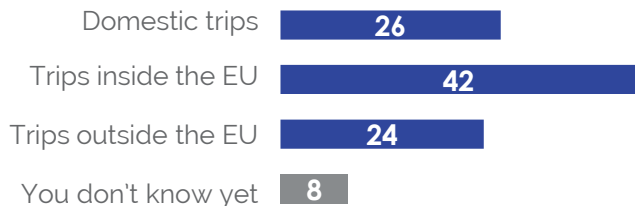
HOLIDAY PREFERENCES FOR 2021 (FROM MARCH TO DECEMBER)



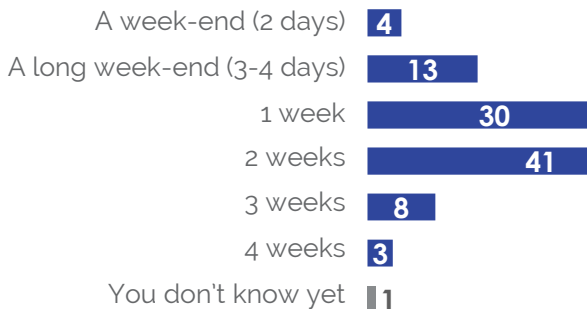
TRENDS FOR 2021 (FROM MARCH TO DECEMBER)



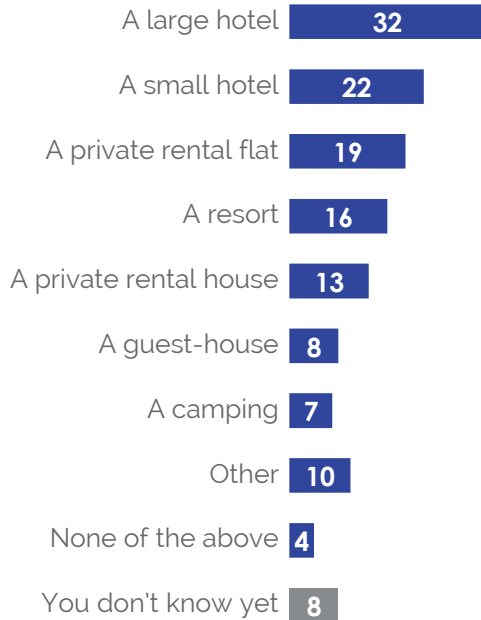
LOCATION



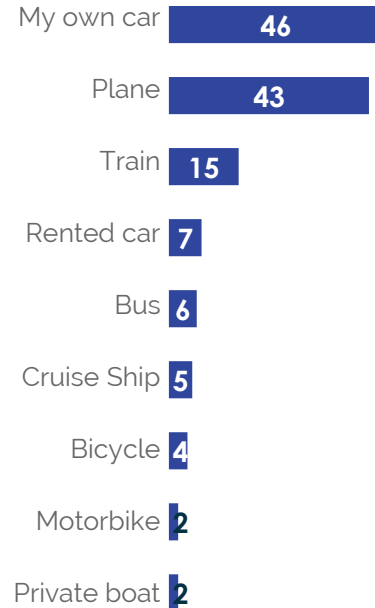
DURATION



TYPE OF LOCATION

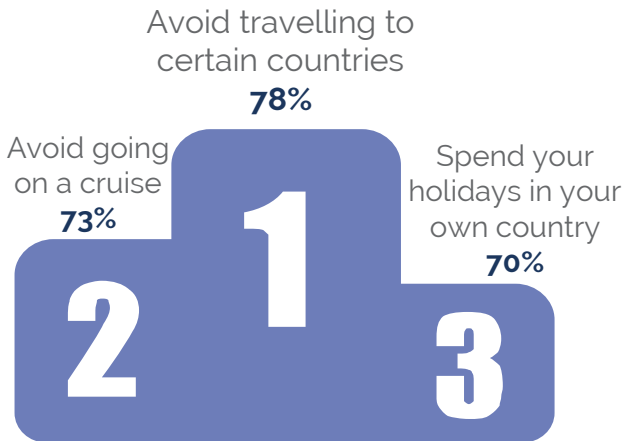


TRANSPORTATION



C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:
 C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering
 C10. Ideally, for your main leisure trip you would like to plan in 2021, are you considering staying in:
 C10bis. Why will you choose this mode of transportation? Is it because:
 Base : Those who have planned their main leisure trip from March to December 2021

TOP 3 RISK-FREE BEHAVIORS



	TOTAL GERMANY	YOUNG (<30 YO)	55-64 YO	MAIN TRIP IN GERMANY	MAIN TRIP OUTSIDE EU
Avoid travelling to certain countries	78%	66%	82%	88%	52%
Avoid going on a cruise	73%	69%	77%	81%	57%
Spend your holidays in your own country	70%	72%	68%	92%	38%
Favour close destinations you can come back from quickly	66%	62%	71%	77%	45%
Avoid amusement parks	64%	52%	71%	70%	56%
Avoid crowded places	63%	55%	66%	64%	50%
Avoid flying and going to airports	58%	50%	67%	72%	26%
Avoid taking the train and going to train stations	48%	35%	58%	50%	30%
Avoid staying at a hotel / resort	39%	44%	44%	45%	26%
Travel only when COVID-19 tested	27%	31%	31%	22%	21%

C20. At a personal level, do you plan to change anything way of travelling? when travelling, do you intend to:

Base : All

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RISK-FREE BEHAVIOURS



Yes certainly Yes probably Non probably not No certainly not Don't know

YES NO



3.

TRAVEL INSURANCE AND ASSISTANCE



INSURANCE COVERAGE



IN THE PAST...

45%

Covered by
a travel insurance

EUROPE

51%

IN THE FUTURE...

46%

Planned to purchase
travel insurance

EUROPE

51%

WAYS OF GETTING TRAVEL INSURANCE

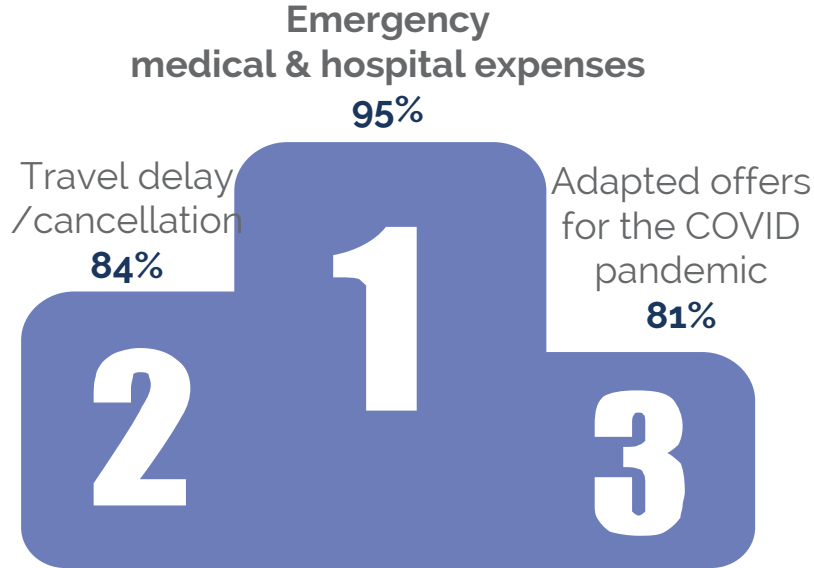


Planned to buy their travel insurance in the future through...

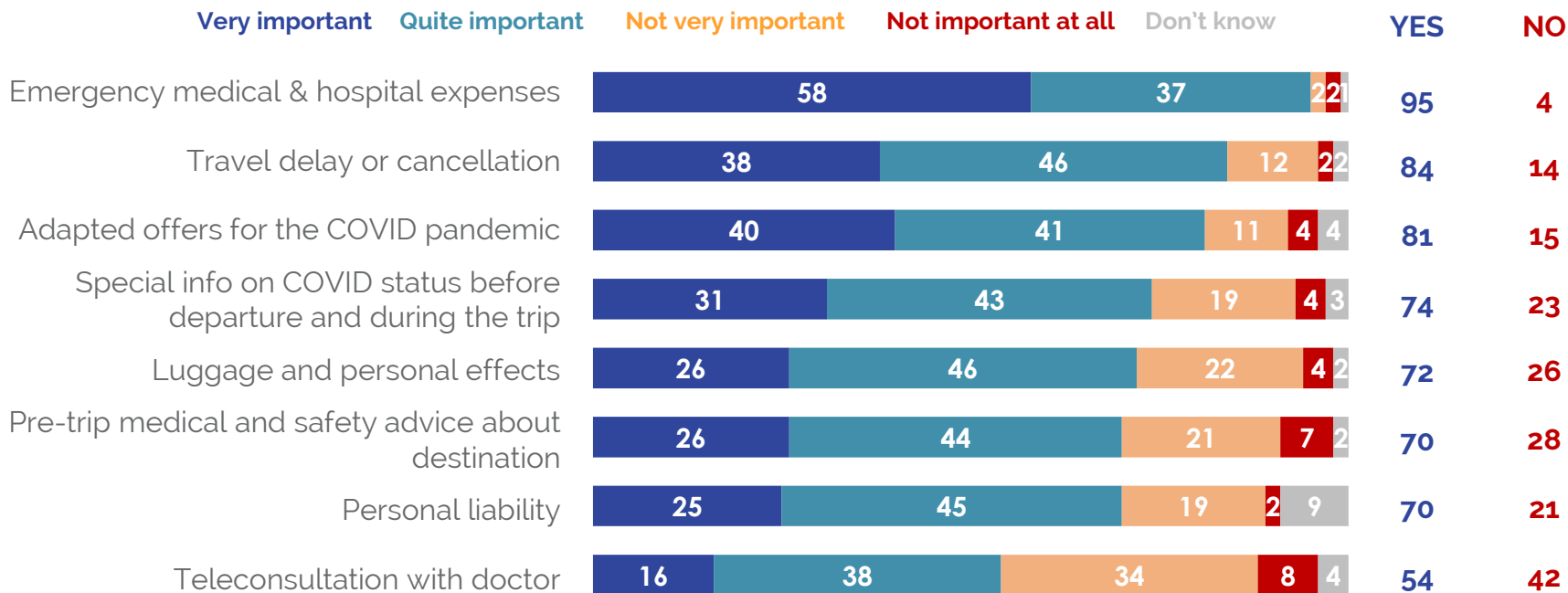


Directly from a travel insurance company : 20%
Through an insurance comparison website: 17%

TOP 3 TRAVEL INSURANCE COVERAGE



IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWINGS



4. COVID RELATED PRODUCTS



TOP 3 COVID-19 RELATED SERVICES



WILLING TO PAY FOR AT
LEAST ONE SERVICE

76%

Including

40% Certainly

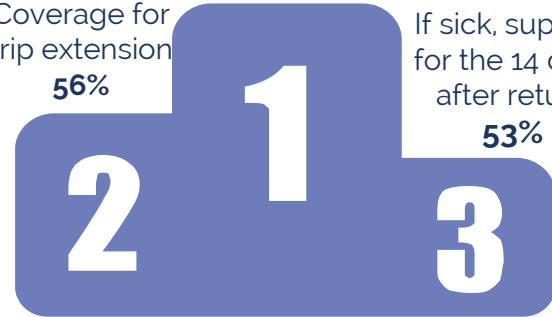
FIRST 3 SERVICES

Coverage for repatriation if holiday location is closing borders/imposing lock down

59%

Coverage for trip extension
56%

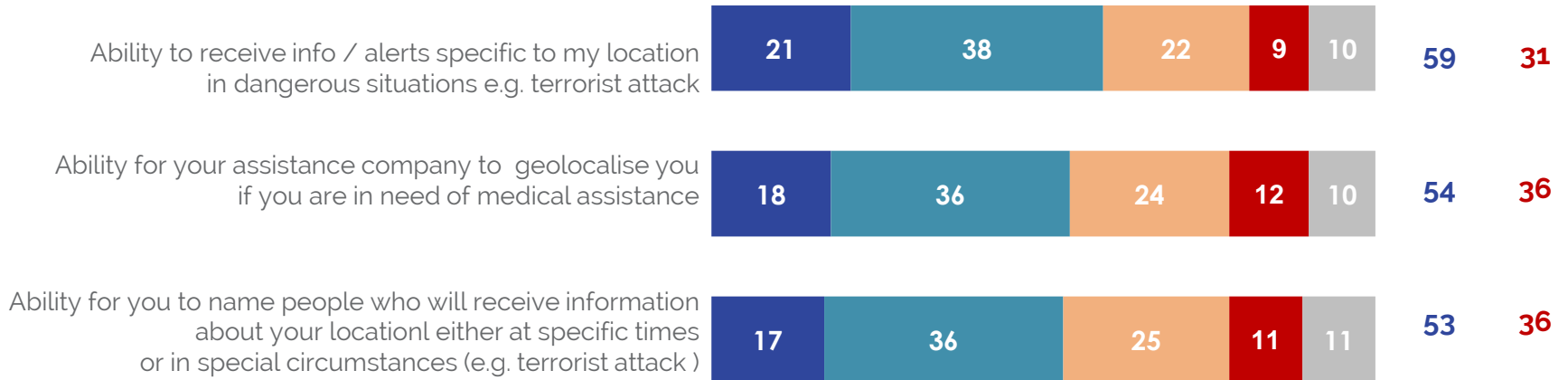
If sick, support for the 14 days after return
53%



FEELINGS OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLE



Much safer Quite safer Not very safer Not safer at all Don't know YES NO



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GAME CHANGERS

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