

“*opinionway*” for **Allianz**  **Partners**

International Travel Confidence Index

Report Germany 

May 2022 – 2nd Wave



ESOMAR²²
Corporate





Methodology



“ Methodology



Study carried out on a sample of **1,020 persons** in Germany.



The samples were interrogated online on CAWI system (Computer Assisted Web Interview).



The samples were drawn up according to the quota method, with regard to the criteria of sex, age, socio-professional category, region of residence and size of agglomeration.



Fieldwork carried out between May 3rd and May 11th 2022.



OpinionWay carried out this survey by applying the procedures and rules of **ISO 20252**



OpinionWay also points out that the results of this survey must be read taking into account the margins of uncertainty: 1.4 to 3,1 points at most for a sample of 1000 respondents.



Any publication, total or partial, must contain the following mention:

« OpinionWay survey for AWP – International Vacation Confidence Index »
and no resumption of the survey can be dissociated from this title.



Results





Level of confidence in travelling this summer

Q. Generally speaking, how confident are you that you will go on vacation this summer (sometime between June and September)?



69% ^{▲+17}

Total confident

31% ^{▼-17}

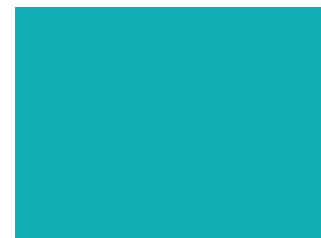
Total not confident

38%



Very confident

31%



Somewhat confident

17%



Not very confident

14%



Not at all confident

▲▼ Evolutions vs November 2021 (confidence in travelling last winter)



Level of confidence in travelling this summer

Q. Generally speaking, how confident are you that you will go on vacation this summer (sometime between June and September)?



	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o+	Yes	No
Total - Confident	69%	75%	64%	87%	80%	76%	61%	55%	81%	66%
...Very confident	38%	42%	34%	49%	43%	43%	34%	27%	47%	35%
...Somewhat confident	31%	33%	30%	38%	37%	33%	27%	28%	34%	31%
Total – Not confident	31%	25%	36%	13%	20%	24%	39%	45%	19%	34%
...Not very confident	17%	14%	19%	10%	12%	15%	18%	25%	13%	18%
...Not at all confident	14%	11%	17%	3%	8%	9%	21%	20%	6%	16%



Level of confidence in travelling this summer

Q. Generally speaking, how confident are you that you will go on vacation this summer (sometime between June and September)?



	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
Total - Confident	69%	65%	67%	66%	78%	80%	65%	53%	61%	80%	87%
...Very confident	38%	32%	36%	35%	46%	41%	39%	31%	27%	45%	59%
...Somewhat confident	31%	33%	31%	31%	32%	39%	26%	22%	34%	35%	28%
Total – Not confident	31%	35%	33%	34%	22%	20%	35%	47%	39%	20%	13%
...Not very confident	17%	17%	19%	16%	14%	12%	20%	26%	20%	13%	8%
...Not at all confident	14%	18%	14%	18%	8%	8%	15%	21%	19%	7%	5%

“ Importance of the summer vacations

Q. How important are summer vacations (June - September) for you?

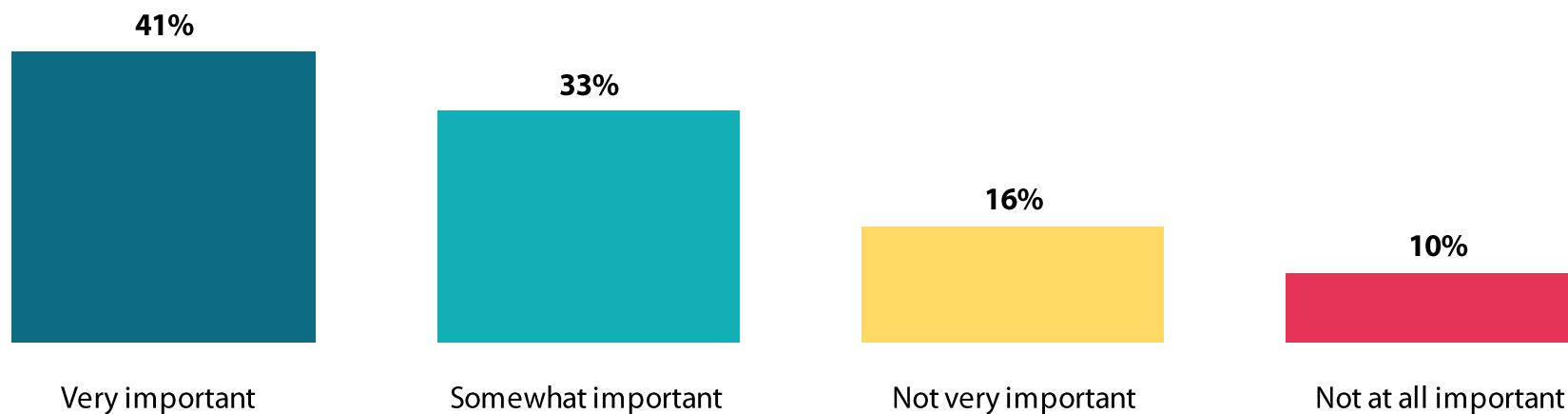


74% ▲ +26

Total important

26% ▼ -26

Total not important



▲ ▼ Evolutions vs November 2021 (Importance of winter vacations)



Importance of the summer vacations

Q. How important are summer vacations (June - September) for you?



	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o+	Yes	No
Total Important	74%	76%	71%	77%	88%	85%	68%	54%	90%	68%
...Very important	41%	43%	39%	50%	50%	46%	39%	26%	53%	37%
...Somewhat important	33%	33%	32%	27%	38%	39%	29%	28%	37%	31%
Total Not important	26%	24%	29%	23%	12%	15%	32%	46%	10%	32%
...Not very important	16%	16%	17%	18%	7%	10%	15%	32%	8%	19%
...Not at all important	10%	8%	12%	5%	5%	5%	17%	14%	2%	13%

“ Importance of the summer vacations

Q. How important are summer vacations (June - September) for you?



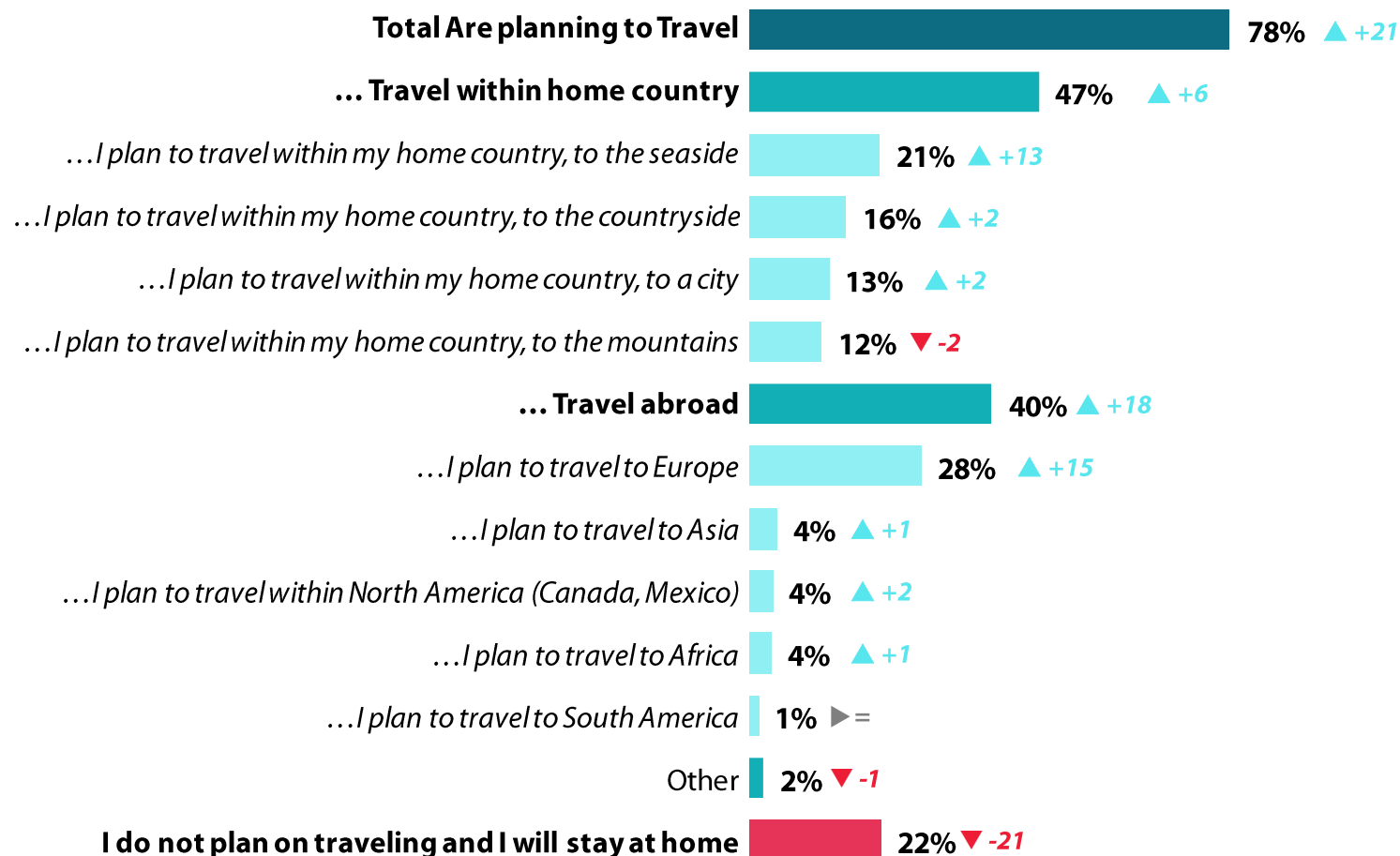
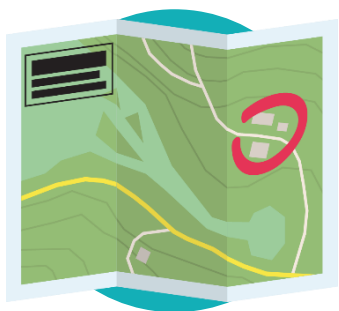
	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
Total Important	74%	71%	74%	73%	80%	79%	69%	58%	67%	82%	86%
...Very important	41%	40%	37%	42%	44%	48%	39%	33%	34%	48%	52%
...Somewhat important	33%	31%	37%	31%	36%	31%	30%	25%	33%	34%	34%
Total Not important	26%	29%	26%	27%	20%	21%	31%	42%	33%	18%	14%
...Not very important	16%	16%	15%	17%	12%	14%	22%	21%	21%	12%	10%
...Not at all important	10%	13%	11%	10%	8%	7%	9%	21%	12%	6%	4%



Travel Plans for the summer vacations

Q. What are your travel plans for your summer vacation (June - September)?

Multiple answers, total over 100%



▲ ▼ Evolutions vs November 2021 (Travel plans for winter vacations)



Travel Plans for the summer vacations

Q. What are your travel plans for your summer vacation (June - September)?

Multiple answers, total over 100%



	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o and more	Yes	No
Total Are planning to Travel	78%	82%	76%	81%	86%	84%	75%	69%	89%	75%
... Travel within home country	47%	47%	48%	46%	53%	51%	42%	44%	57%	44%
... to the seaside	21%	20%	23%	18%	28%	25%	18%	17%	28%	19%
... to the countryside	16%	15%	17%	13%	15%	19%	14%	15%	21%	14%
... to a city	13%	14%	12%	17%	15%	14%	10%	11%	15%	12%
... to the mountains	12%	13%	11%	12%	13%	17%	9%	7%	19%	9%
... Travel abroad	40%	44%	36%	49%	44%	44%	38%	28%	45%	38%
...I plan to travel to Europe	28%	30%	26%	23%	30%	35%	27%	22%	35%	26%
...I plan to travel to Asia	4%	6%	3%	14%	5%	3%	4%	2%	4%	5%
...I plan to travel within North America	4%	6%	2%	10%	6%	3%	2%	1%	6%	3%
...I plan to travel to Africa	4%	3%	4%	5%	6%	4%	2%	1%	5%	3%
...I plan to travel to South America	1%	2%	1%	3%	2%	2%	1%	-	2%	1%
Other	2%	1%	3%	1%	1%	1%	4%	3%	1%	3%
I do not plan on traveling and I will stay at home	22%	18%	24%	19%	14%	16%	25%	31%	11%	25%



Travel Plans for the summer vacations



Q. What are your travel plans for your summer vacation (June - September)?

Multiple answers, total over 100%



	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
Total Are planning to Travel	78%	78%	80%	77%	84%	83%	72%	64%	73%	85%	90%
... Travel within home country	47%	51%	48%	42%	45%	46%	49%	42%	49%	48%	45%
... to the seaside	21%	33%	27%	13%	13%	17%	19%	15%	23%	19%	24%
... to the countryside	16%	12%	16%	16%	12%	18%	19%	17%	14%	17%	18%
... to a city	13%	10%	13%	11%	13%	15%	15%	5%	14%	15%	13%
... to the mountains	12%	10%	8%	12%	12%	18%	12%	15%	9%	13%	14%
... Travel abroad	40%	36%	43%	41%	44%	47%	30%	29%	30%	46%	59%
...I plan to travel to Europe	28%	25%	32%	25%	34%	35%	19%	14%	21%	35%	45%
...I plan to travel to Asia	4%	7%	5%	6%	4%	2%	3%	7%	3%	4%	7%
...I plan to travel within North America	4%	5%	3%	4%	1%	5%	5%	2%	3%	5%	5%
...I plan to travel to Africa	4%	3%	5%	4%	3%	2%	3%	2%	3%	5%	5%
...I plan to travel to South America	1%	2%	1%	1%	2%	2%	1%	-	-	2%	3%
Other	2%	1%	2%	5%	3%	2%	2%	6%	2%	2%	1%
I do not plan on traveling and I will stay at home	22%	22%	20%	23%	16%	17%	28%	36%	27%	15%	10%

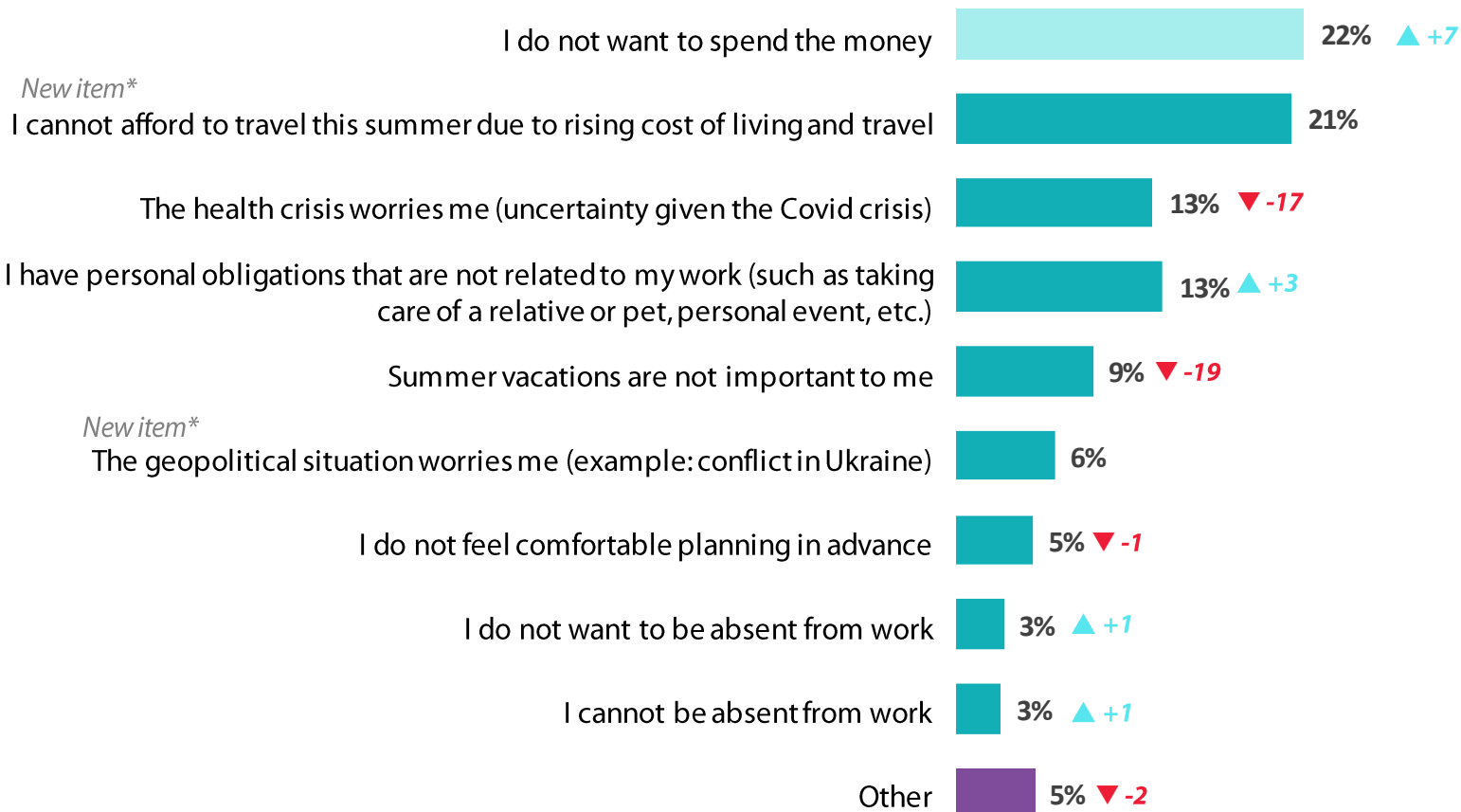


Reasons for not planning to travel during the summer vacations



Q. Why are you not planning on taking a vacation this summer (June - September)?

Question asked only to those who do not plan on traveling



▲ ▼ Evolutions vs November 2021 (winter vacations) / *New item (no comparison)

Budget planned to be spent

Q. How much do you anticipate spending for on your summer vacation (June - September), for your household?

Question asked only to those who plan on leaving on vacation



1 680 € ▼ -90€

Planned to be spent on average



Budget planned to be spent

Q. How much do you anticipate spending for on your summer vacation (June - September), for your household?

Question asked only to those who plan on leaving on vacation



	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o and more	Yes	No
300€ or less	11%	11%	12%	27%	7%	15%	4%	10%	11%	11%
301 – 599€	10%	9%	11%	17%	10%	5%	13%	11%	8%	11%
600 - 999€	9%	8%	10%	7%	12%	5%	10%	13%	6%	10%
1 000 – 1 999€	20%	20%	20%	11%	29%	19%	22%	17%	21%	20%
2 000 – 2 999€	14%	15%	13%	4%	12%	18%	16%	12%	20%	12%
3 000€ or more	14%	19%	9%	18%	13%	16%	12%	11%	20%	12%
Don't know / Refuse	22%	18%	25%	16%	17%	22%	23%	26%	14%	24%
Average (€)	1680	1882	1459	1329	1696	1833	1776	1521	2080	1506

Budget planned to be spent

Q. How much do you anticipate spending for on your summer vacation (June - September), for your household?

Question asked only to those who plan on leaving on vacation



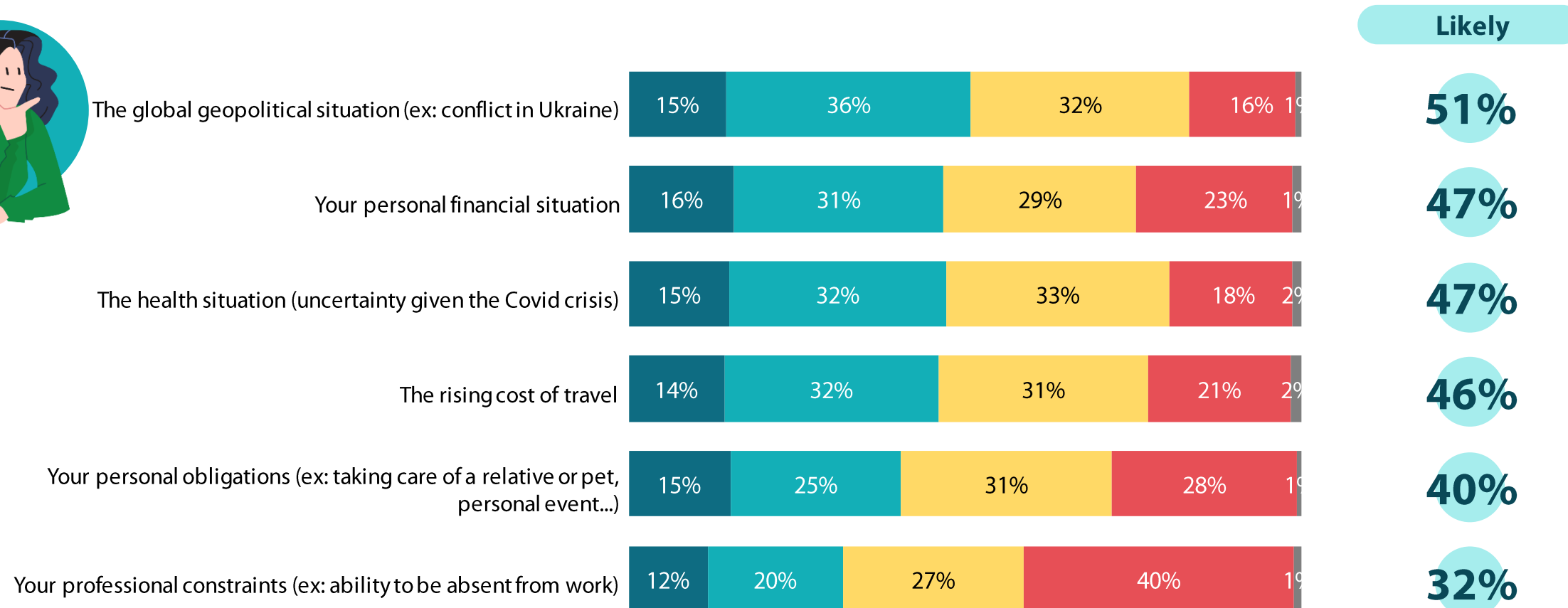
	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month*	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
300€ or less	11%	6%	13%	13%	6%	13%	14%	23%	15%	5%	10%
301 – 599€	10%	13%	8%	18%	6%	6%	13%	17%	15%	9%	3%
600 - 999€	9%	13%	8%	7%	9%	9%	8%	7%	13%	10%	4%
1 000 – 1 999€	20%	13%	20%	19%	33%	20%	19%	13%	20%	23%	20%
2 000 – 2 999€	14%	14%	14%	9%	19%	12%	15%	6%	7%	19%	25%
3 000€ or more	14%	13%	15%	15%	7%	18%	14%	-	10%	16%	27%
Don't know / Refuse	22%	28%	22%	19%	20%	22%	17%	34%	20%	18%	11%
Average (€)	1680	1657	1902	1636	1504	1731	1566	672	1246	1750	2544

*Due to the small number of interviews, the results should be interpreted with caution

“ The obstacles when planning summer vacations

Q. How likely is it that any of the following items could lower your aspirations for your summer travel plans? (ex: change the destination, reduce the duration or the budget, or even cancel your plans)

Question asked only to those who plan on leaving on vacation



● Very likely
● Somewhat likely
● Somewhat unlikely
● Very unlikely
● You already cancelled or changed your plans



The obstacles when planning summer vacations



Q. How likely is it that any of the following items could lower your aspirations for your summer travel plans? (ex: change the destination, reduce the duration or the budget, or even cancel your plans)

Question asked only to those who plan on leaving on vacation

	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o and more	Yes	No
The global geopolitical situation (ex: conflict in Ukraine)	51%	51%	51%	66%	51%	53%	50%	39%	59%	47%
Your personal financial situation	47%	44%	49%	60%	60%	53%	38%	30%	54%	44%
The health situation (uncertainty given the Covid crisis)	47%	49%	46%	54%	49%	52%	42%	40%	56%	44%
The rising cost of travel	46%	46%	47%	46%	50%	58%	37%	35%	53%	44%
Your personal obligations (ex: taking care of a relative or pet, personal event...)	40%	40%	41%	71%	54%	41%	33%	19%	49%	38%
Your professional constraints (ex: ability to be absent from work)	32%	33%	31%	55%	52%	36%	22%	6%	49%	25%



The obstacles when planning summer vacations



Q. How likely is it that any of the following items could lower your aspirations for your summer travel plans? (ex: change the destination, reduce the duration or the budget, or even cancel your plans)

Question asked only to those who plan on leaving on vacation

	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month*	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
The global geopolitical situation (ex: conflict in Ukraine)	51%	51%	51%	56%	50%	48%	50%	58%	55%	52%	45%
Your personal financial situation	47%	48%	46%	45%	48%	48%	46%	66%	55%	39%	36%
The health situation (uncertainty given the Covid crisis)	47%	48%	50%	53%	43%	39%	49%	45%	55%	43%	43%
The rising cost of travel	46%	51%	45%	47%	40%	42%	50%	50%	54%	44%	35%
Your personal obligations (ex: taking care of a relative or pet, personal event...)	40%	40%	45%	44%	34%	41%	37%	50%	43%	41%	36%
Your professional constraints (ex: ability to be absent from work)	32%	33%	30%	28%	27%	33%	37%	36%	34%	33%	29%

*Due to the small number of interviews, the results should be interpreted with caution

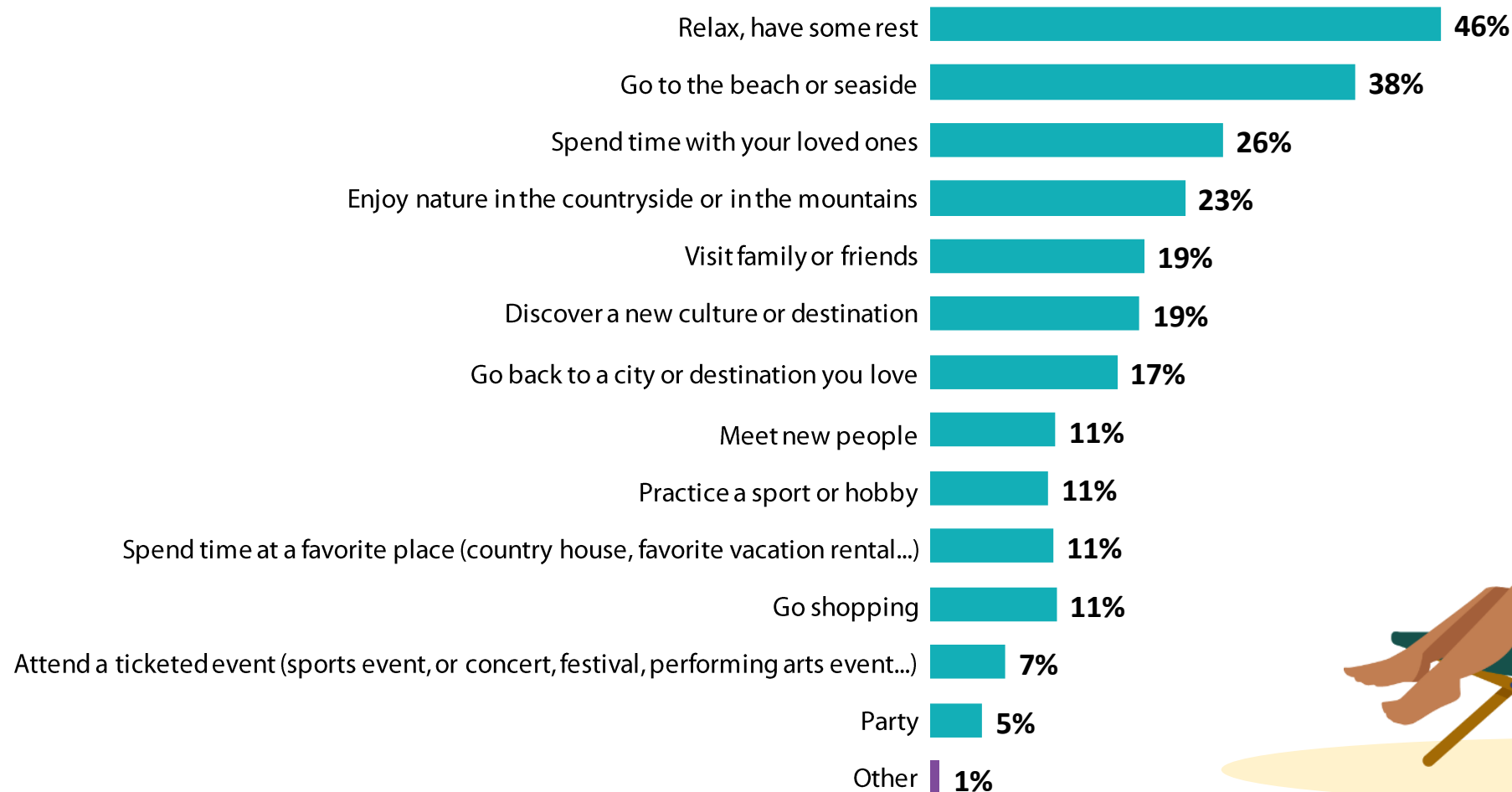


Expectations for the summer vacations

Q. What do you hope to do during your summer holiday?

Question asked only to those who plan on leaving on vacation

Multiple answers, total over 100%



GERMANY
(833 persons)





Expectations for the summer vacations

Q. What do you hope to do during your summer holiday?

Question asked only to those who plan on leaving on vacation

Multiple answers, total over 100%



	% Total	Gender		Age					Children below 16 y.o within the household	
		Man	Woman	18-24 y.o	25-34 y.o	35-49 y.o	50-64 y.o	65 y.o and more	Yes	No
Relax, have some rest	46%	43%	49%	21%	40%	47%	54%	52%	37%	49%
Go to the beach or seaside	38%	34%	42%	30%	36%	40%	45%	32%	36%	38%
Spend time with your loved ones	26%	23%	30%	20%	33%	27%	25%	24%	32%	24%
Enjoy nature in the countryside or in the mountains	23%	25%	20%	15%	15%	21%	27%	32%	24%	22%
Visit family or friends	19%	17%	21%	22%	14%	16%	20%	25%	18%	19%
Discover a new culture or destination	19%	17%	20%	16%	20%	18%	21%	18%	18%	19%
Go back to a city or destination you love	17%	18%	16%	23%	19%	10%	13%	25%	12%	18%
Meet new people	11%	15%	8%	15%	11%	9%	13%	10%	11%	11%
Practice a sport or hobby	11%	12%	10%	10%	15%	12%	9%	6%	11%	10%
Spend time at a favorite place	11%	11%	11%	15%	12%	10%	8%	13%	12%	11%
Go shopping	11%	10%	12%	15%	12%	14%	12%	4%	13%	11%
Attend a ticketed event	7%	8%	6%	15%	11%	6%	2%	5%	9%	6%
Party	5%	7%	3%	6%	5%	9%	2%	-	6%	4%
Other	1%	1%	1%	-	-	-	2%	2%	-	1%



Expectations for the summer vacations

Q. What do you hope to do during your summer holiday?

Question asked only to those who plan on leaving on vacation,
Multiple answers, total over 100%



	% Total	Region						Monthly incomes of the household			
		Hamburg, Bremen, Schleswig-Holstein, Niedersachsen	Nordrhein-Westfalen	Hessen, Rheinland-Pfalz, Saarland	Baden-Württemberg	Bayern	Berlin, Mecklenburg-Vorpommern, Brandenburg, Sachsen-Anhalt, Thüringen, Sachsen	Below 1000 €/month*	1 000 - 1 999 €/month	2 000 - 3 499 €/month	3 500 €/month or +
Relax, have some rest	46%	48%	50%	39%	52%	38%	45%	24%	51%	43%	44%
Go to the beach or seaside	38%	44%	37%	33%	45%	38%	33%	17%	40%	39%	41%
Spend time with your loved ones	26%	29%	24%	31%	25%	18%	30%	26%	25%	22%	32%
Enjoy nature in the countryside or in the mountains	23%	31%	21%	19%	21%	24%	21%	36%	15%	23%	27%
Visit family or friends	19%	28%	19%	19%	14%	14%	20%	23%	21%	20%	15%
Discover a new culture or destination	19%	14%	19%	20%	13%	28%	18%	20%	14%	19%	25%
Go back to a city or destination you love	17%	18%	19%	17%	16%	18%	13%	16%	19%	16%	17%
Meet new people	11%	10%	10%	16%	5%	13%	14%	4%	16%	11%	7%
Practice a sport or hobby	11%	12%	7%	7%	13%	15%	10%	10%	8%	12%	12%
Spend time at a favorite place	11%	10%	11%	11%	10%	9%	14%	19%	7%	11%	15%
Go shopping	11%	9%	11%	15%	7%	19%	9%	3%	12%	14%	11%
Attend a ticketed event	7%	6%	9%	10%	3%	5%	7%	11%	4%	9%	7%
Party	5%	4%	4%	6%	3%	7%	3%	-	3%	8%	6%
Other	1%	-	1%	-	-	1%	3%	2%	1%	-	1%



MAKE THE WORLD EASY TO UNDERSTAND SO WE CAN ACT NOW AND IMAGINE THE FUTURE.

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Founded in 2000 on this radically innovative idea at the time, OpinionWay was a forerunner in renewing the practices in the field of marketing and opinion research.

With continuous growth since its creation, the company has constantly opened up to new horizons to better address all marketing and societal issues, by integrating Social Media Intelligence, smart data exploitation, creative co-construction activities, online communities approaches and storytelling into its methodologies.

Today OpinionWay continues its dynamic growth by expanding geographically in high-potential regions such as Eastern Europe and Africa.

This is the mission that drives OpinionWay's employees and the foundation of the relationship they build with their clients.

The pleasure they derive from providing answers to the questions they ask themselves, reducing uncertainty about the decisions to be made, tracking relevant insights and co-constructing solutions for the future, feeds all the projects they work on.

This enthusiasm, combined with a genuine taste for innovation and sharing, explains why our customers express a high level of satisfaction after each collaboration – 8.9/10, and a high recommendation rate - 3.88/4.

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