amadeus

Rethink Travel Global Survey

Germany insights

2020

Introduction

According to statistics from the Robert Koch Institute[1] there have been almost 500,000 confirmed infections in the Federal Republic of Germany since the beginning of the coronavirus pandemic, with almost 10,500 deaths attributed to the disease. The impact on the country and the economy is serious and has already led to the loss of thousands of jobs, many of them in the tourism and hospitality sectors.

Censuswide surveyed 6,074 respondents who've traveled abroad in the last 18 months in France, Germany, India, Singapore, UK and US between 14.09.2020 - 22.09.2020.

CENSUSWIDE
THE SURVEY CONSULTANTS

Below are some of the key insights for the German market.[2] Similar reports focused on the other five countries plus a global report can be found at **amadeus.com/rethinktravel**

[1] As of 30 October 2020
[2] 1,002 respondents who've traveled abroad in the last 18 months in Germany
For reference: Generation Z = 16-24 year olds; Millennials = 25-39 year olds; Generation X = 40-54 year olds; Boomers = 55-74 year olds; 75+ Silent Generation

Germany insights

The biggest concerns about traveling in light of COVID-19

The biggest concern for German travelers is the increased risk of catching or transmitting the virus (38%), followed by Government imposed quarantine at destination or upon return home (37%) and fears of being stranded in the destination if travel options are cancelled or changed (37%). Only 11% of people were concerned about access to information on which destinations are safe to travel to.

38%
Increased risk of catching or transmitting the virus

37%
Government-imposed quarantines at either end of the journey

37%
Fear of being stranded

11%
Concerned about access to information about where is safe to travel to

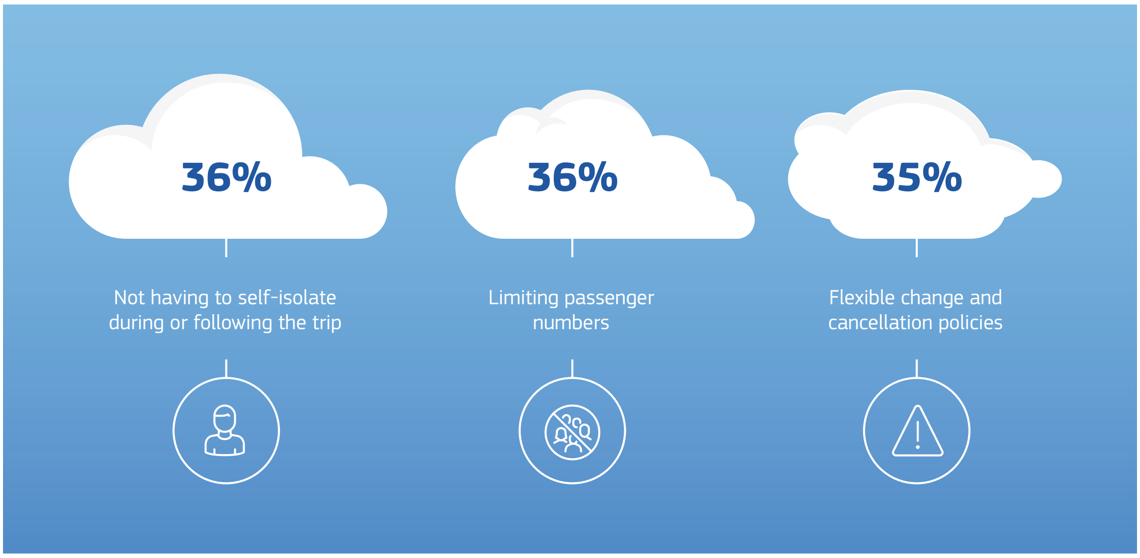
But different kinds of travelers are concerned about different things - people who only travel for business are **much less likely to be concerned about Government enforced quarantine at destination or upon return home (11% vs 41% for leisure only travelers),** but are more likely to have concerns over safety and cleanliness of public transport (24% vs 18% for leisure only travelers).

Respondents who have traveled on a long-haul flight in the last 18 months were more likely than respondents who have traveled on a short-haul flight in the last 18 months to be concerned about having to wear a mask for long periods of time (33% vs 29%), and about the inability to enforce social distancing on planes (36% vs 33%).

Different age groups also have different concerns: the inability to enforce social distancing on planes is a concern for 41% of 55-74 year olds, but only 17% of 16-24 year olds. Concerns over being stranded in the destination if travel options are cancelled or changed and reduced enjoyment of the travel experience due to restrictions at destination were also higher with older age groups (40-54 and 55-74).

The conditions that would make German respondents feel comfortable traveling

The biggest things that German travelers noted as needing to be fulfiled for them to feel comfortable traveling were not having to self-isolate at destination or on return home, selected by 36% of respondents, and limiting the number of passengers on the plane to reduce contact (also 36%), followed by flexible change and cancellation policies and payment terms to avoid penalty or losing money (35%).



Respondents who are business travelers said that being able to socially or physically distance throughout the journey and limiting the number of passengers on planes to reduce contact (20% each) would need to be fulfiled for them to feel comfortable traveling. Respondents who are long-haul travelers were more likely to be reassured (43%) than respondents who are short-haul travelers (37%) by not having to self-isolate at destination or on return home.

Overall 22% identified technology that reduces human contact, queues and physical touchpoints as a source of comfort when traveling, with preference for this being **highest with those who regularly travel for both business and leisure (34%).**

The technologies that would increase confidence in travel among German respondents in the next 12 months

Contactless payments (36%), mobile apps to provide on-trip notifications and alerts (33%) and mobile boarding (32%) were the most popular technologies that respondents noted would increase their confidence to travel in the next 12 months.

Respondents traveling only for business were more likely to be attracted to facial and vocal recognition technologies (28% and 24% respectively) than those traveling only for leisure (18% and 11% respectively). **Respondents who are leisure travelers were more likely to prefer self-service check-in (27% vs 15% for respondents who are business travelers) and contactless payments (35% vs 30% for respondents who are business travelers).**

Age plays some part in preferences here - 32% of Generation Z would have their confidence to travel in the next 12 months increased by mobile boarding, but that drops slightly to 30% for Boomers. 38% of respondents who are Boomers said that no technology would increase their confidence to travel in the next 12 months (compared to 14% of Generation Z).

The technology experiences that would address travelers' biggest concerns about traveling in light of COVID-19 and make them more likely to travel

83% of German travelers[3] who have any biggest concerns about traveling in light of COVID-19 responded that at least one of the suggested technologies could address their concerns and would make them more likely to travel. **Availability of full information at point of search, booking and just before travel was the most commonly selected technology experience that would address concerns about traveling in light of COVID-19 (36%),** followed by contactless payment experiences at the airport, in-flight, ground transport and accommodations (34%) and contactless experiences at hotels (31%). Remote baggage check-in away from the airport was the tech least likely to address concerns about traveling in light of COVID-19 and encourage respondents to travel (16%).

Availability of full information at point of search, booking and just before travel was most important to Millennials (39%, compared to 33% for Boomers) while the contactless payment experiences at the airport, in-flight, ground transport and accommodations was more popular with respondents who are long-haul travelers (41%) than with respondents who are short-haul travelers (36%).

[3] Inverse of respondents who selected 'None of the above' when answering 'Considering your biggest concerns about traveling in light of COVID-19, which of the following technology experiences would make you more likely to travel?' (17%)

What German travelers would most like technology to do for them

Overall, the three biggest things that German travelers most wanted technology to do when thinking about travel were for it to:

- Reduce queues and congestion in public spaces (38%)
- Minimize their face-to-face or physical contact with others (30%)
- Protect their financial data and personal information (29%)

Age was a factor here - older generations were much more likely to be interested in tech reducing queues and congestion in public spaces (45% for Boomers vs 30% for Generation Z) and ensuring the accuracy and effectiveness of national test, track and trace programs (28% for Boomers vs 17% for Generation Z).

Travelers' hopes and expectations for the future of travel

A majority (59%) expect that they won't have to make fewer trips due to travel restrictions in the next 12 months.[4] This actually increases when looking at personal confidence - 64% expect that they won't have to make fewer trips because of their own worries about COVID-19[5], though this decreases with age (it's only 57% for those aged 55-74).

While overall only 20% of respondents agreed they would like to see a clear way to identify sustainable travel options and a mechanism to reduce carbon emissions in travel, this rose to 32% for respondents who regularly travel for both business and leisure. Respondents who are long-haul flight travelers were more likely to agree that they would like to see an effective 'test, track and trace' program in place that adheres to global standards to provide reassurance that any outbreaks can be addressed quickly (42%, compared to 35% overall).

Regional perspectives

- Respondents from the Hessen region were the most likely **(at 13%)** to say that they had no biggest concerns about traveling in light of COVID-19- those from the Niedersachsen region were least likely **(6%).**
- Safety and cleanliness of public transport is of greater concern to Berlin respondents **(22%)** compared to **18%** in both Baden-Wurttemberg and Bayern. Whilst Government imposed quarantine is of biggest concern to respondents in Baden-Wurttemberg **(45%)**
- One universal traveler identification is more important to Berlin respondents then Bayern **(23% vs 19%)** and more Bayern travelers expect to make fewers trip over the next 12 months due to Government travel restrictions compared to Berlin respondents **(46% vs 32%)**

[4] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to government travel restrictions' (41%)
[5] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to my lack of confidence about the safety of travel in light of COVID-19' (36%)

Conclusion

The survey demonstrates that there is a continued appetite for travel, however, it is clear that travelers are looking for their concerns to be addressed. The positive news for the industry is that many of these concerns and preferences can be addressed with technology that is available today, whether it is to provide better access to information, ensure social distancing, reduce physical content or more.

As the industry has faced the challenges of COVID-19, we have seen the acceleration of technology development and adoption, all designed to foster increase confidence among travelers and help the industry to adapt to the changed environment. It is evident from this survey that technology will play a key role in encouraging demand as people start to travel once more. In the same way we have seen across workplaces, retail environments and in entertainment, technology offers huge potential to rethink how we experience the world.

At Amadeus, we work with our customers across all areas of travel, deploying technology that improves both the traveler experience and operational efficiency.

For our airline customers, we provide departure control solutions that ensure social distancing, dispersed seating on airplanes and the capacity to automatically rebook should a journey be disrupted. At airports, we are deploying biometric and self-service solutions to help reduce physical contact and speed the flow of passengers through an airport in a way that instils confidence. For hotels, we deliver solutions to help manage strict cleaning schedules, enabling compliance with the latest protocols and standards.

As touchless experiences become key to unlocking travel, we are delivering for our customers, whether it is through contactless payments, remote and self-service bag drop solutions or mobile or voice activated kiosks. Additionally, through our focus on innovation we offer a wide range of customer service solutions from AI-powered chatbots that can answer critical questions about travel policies and a travel alerts notifier that delivers key information via SMS or email, key to keeping travelers informed throughout their journeys.

At the core of our approach is a commitment to working in partnership with our customers. Our teams are working with customers each day to create the solutions that will not only help them address the immediate challenges of today, but equip them for the renewal and recovery we want to see.