Welcome to Allianz Partners

Behind you for what’s ahead
Our Company

We are part of the Allianz Group (Number 1 insurer 2021 Interbrand Best Global Brand Rankings)

Travel Insurance company protecting customers worldwide with innovative and high-tech products and services
We serve customers around the globe

- Commercial activities in 75 countries
- Serving customers in 70 languages
- Working with 50+ car brands in 30+ countries
- 58 million Cases handled*
- 213 Countries and territories in which medical interventions occurred**
- 59 million Calls handled*
- 8,500 Medical repatriations*
- 48 Awards
- 904,000 medical providers worldwide

*each year
**covers territories/islands such as St Martin, St Barthelemy, Canary Islands
Methodology

Study carried out on a sample of 9,005 persons in the following countries:

- FRANCE: 1,000 persons
- GERMANY: 1,001 persons
- UK: 1,000 persons
- ITALY: 1,000 persons
- SPAIN: 1,002 persons
- NETHERLANDS: 1,001 persons
- AUSTRIA: 1,001 persons
- SWITZERLAND: 1,000 persons
- USA: 1,000 persons

Fieldwork carried out between November 2nd and November 9th 2021.
Level of travel confidence

The top 3 most confident countries concerning the ability to go on vacation this Winter are Spain (71%), Italy (69%) and the United States (66%)

Switzerland (58%), France (58%), the UK (55%), Germany (52%) and Austria (51%) is the second group of confidence
Importance of Winter vacations

(directly linked to the travel confidence)

Spanish (73%), Americans (69%) and Italians (64%) are most likely to consider this vacation important. Followed by UK (58%).

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Respondents</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>1,000 persons</td>
<td>42%</td>
</tr>
<tr>
<td>Germany</td>
<td>1,001 persons</td>
<td>48%</td>
</tr>
<tr>
<td>UK</td>
<td>1,000 persons</td>
<td>58%</td>
</tr>
<tr>
<td>Italy</td>
<td>1,000 persons</td>
<td>64%</td>
</tr>
<tr>
<td>Spain</td>
<td>1,002 persons</td>
<td>73%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,001 persons</td>
<td>45%</td>
</tr>
<tr>
<td>Austria</td>
<td>1,001 persons</td>
<td>46%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1,000 persons</td>
<td>49%</td>
</tr>
<tr>
<td>USA</td>
<td>1,000 persons</td>
<td>69%</td>
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</tbody>
</table>
Likelihood to travel this Winter
(directly linked to the travel confidence)

Italians and Spaniards are the most likely to go on Winter vacation

<table>
<thead>
<tr>
<th>Country</th>
<th>Likelihood</th>
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<tbody>
<tr>
<td>France</td>
<td>51%</td>
</tr>
<tr>
<td>Germany</td>
<td>57%</td>
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<tr>
<td>UK</td>
<td>62%</td>
</tr>
<tr>
<td>Italy</td>
<td>77%</td>
</tr>
<tr>
<td>Spain</td>
<td>78%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>59%</td>
</tr>
<tr>
<td>Austria</td>
<td>61%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>60%</td>
</tr>
<tr>
<td>USA</td>
<td>68%</td>
</tr>
</tbody>
</table>

% who plan to travel this winter
Travel plans: abroad or domestic

The majority plans to have Winter vacation within the home country.

Only Switzerland has more people planning to spend their Winter vacation abroad vs. at home.

The preferred Winter travel destination is one’s home country.
For the majority of countries, travel Winter is not important to them and plan to stay at home

<table>
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<td>UK</td>
<td>1,000 persons</td>
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<tr>
<td>Italy</td>
<td>1,000 persons</td>
</tr>
<tr>
<td>Spain</td>
<td>1,002 persons</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,001 persons</td>
</tr>
<tr>
<td>Austria</td>
<td>1,001 persons</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1,000 persons</td>
</tr>
<tr>
<td>USA</td>
<td>1,000 persons</td>
</tr>
</tbody>
</table>

I don’t plan to travel and I will stay at home

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>49%</td>
</tr>
<tr>
<td>Germany</td>
<td>43%</td>
</tr>
<tr>
<td>UK</td>
<td>38%</td>
</tr>
<tr>
<td>Italy</td>
<td>23%</td>
</tr>
<tr>
<td>Spain</td>
<td>22%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>41%</td>
</tr>
<tr>
<td>Austria</td>
<td>39%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>40%</td>
</tr>
<tr>
<td>USA</td>
<td>32%</td>
</tr>
</tbody>
</table>
The health crisis is the most selected reason for not travelling in Germany, and the second in the UK, USA and Austria.

Meanwhile saving money is the most selected in USA, Italy and Spain.
The average budget anticipated by Americans for Winter vacation this year is by far the highest: €2993 ($3382)

Travel expenses in USA are high (long distances by plane)

IT and SP, plan to spend time with their siblings and domestic travel is not expensive (train or car)

Americans plan to spend the most: €2993

While the Spaniards ($932) and the Italians ($764) plan to spend the least.
The main precautions travelling with the pandemic up to today are: being vaccinated, reservations with flexibility to change/modify, taking a Covid19 test before and/or after travelling.

TOP3 Precautions per country
Conclusions

• **The travel confidence** this Winter is directly linked to the importance that is given to winter holidays. The countries who are more keen on travelling this Winter are SP, IT and US, specially local. Although the level of confidence is pretty good in all countries.

• **The preferred destination** is the home country, although countries like Switerland and Netherlands have more intention to travel abroad.

• US citizens plan to **spend the most during these winter vacation period**, mainly due to the transport, and IT and SP the least, as the destinations at their home country are feasible (train or car).

• The countries that **give more importance to this Winter vacational period** are also the countries who plan to travel more.

• **Health crisis is still a concern**, and vaccination seems to be the major precaution that people take in order to travel (also due to the countries restrictions for border traspasing).

• Although the second topic that still worries the surveyd countries is related to the **potential effect of the health crisis on their reservations** for lodging and transport.
Our mission in the Travel industry is not just about offering insurance solutions but helping the Society and the Tourism industry to keep up with their confidence in traveling. Allianz Partners’ role is to provide with the tools, information, and solutions that allow people to be confident again and aim to go on traveling.

This is why we’ve created and launched Allyz, a platform that shares with any traveler all the information and resources that might need before, during, and after their trip.

https://es.allyz.com/
Thank you!