amadeus

Rethink Travel Global Survey

2020

Introduction

French novelist Gustave Flaubert famously wrote, “Travel makes one modest. You see what a tiny place you occupy in the world.” For millions who cherish wanderlust, that modesty has grown in 2020 as people in most countries have experienced how swiftly and unexpectedly travel can be taken away, and how an individual’s sphere of discovery can contract from the entire globe to one’s home in a matter of hours.

In March 2020, when the majority of travel came to a halt, Amadeus, a global leader in travel technology, immediately turned its attention to what its customers across the travel sector – airlines, airports, hotels, travel agencies, rail providers, corporations and more – required to mitigate the devastation to their businesses.

Airlines needed to minimize the impact of disruption for passengers and employees. Airports needed ways to be agile to rapidly adapt as traffic volumes scaled down, and health screening, and hygiene and social distancing measures moved front and center. Hotels needed resources for crisis management and business continuity assurance, and travel agents and corporations needed support helping travelers get home as quickly and safely as possible as major countries closed their borders.

As cases of COVID-19 escalated across the world, it was evident that travel would change for all of us, so in June 2020 Amadeus began an initiative to rethink travel and explore ways enterprises and governments can work together to make an expedient return to travel safely while also recognizing that out of a crisis comes opportunities to rebuild better than before.

Fueled by a desire to help the industry further understand travelers’ requirements as we move towards a return to travel, Amadeus commissioned this research with global insight-driven research firm Censuswide to learn more about travelers’ top concerns and what types of technology would help them feel safe and comfortable enough and help spur recovery of the travel sector. The survey was conducted September 14 – 22, 2020.

Informed by over 6,074 respondents residing in France, Germany, India, Singapore, UK and US, who’ve traveled in the past 18 months, the study found that technology plays a crucial role in supporting recovery, as over 4 in 5 (84%) travelers said technology would increase their confidence to travel in the next 12 months by addressing concerns around mixing with crowds, social distancing and physical touchpoints.

CENSUSWIDE
THE SURVEY CONSULTANTS

This report summarizes findings across the six countries involved in the survey. Additionally, separate reports with more details about each country can be found here: **amadeus.com/rethinktravel**

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

Research findings will outline:

1. Traveler sentiment, confirming largely known concerns about traveling in light of COVID-19.
2. Traveler preferences, identifying areas of concern that need to be addressed and how they differ between countries, demographics and traveler type.
3. Technology's ability to rebuild traveler confidence, including specific technologies that can allay travelers' major concerns.

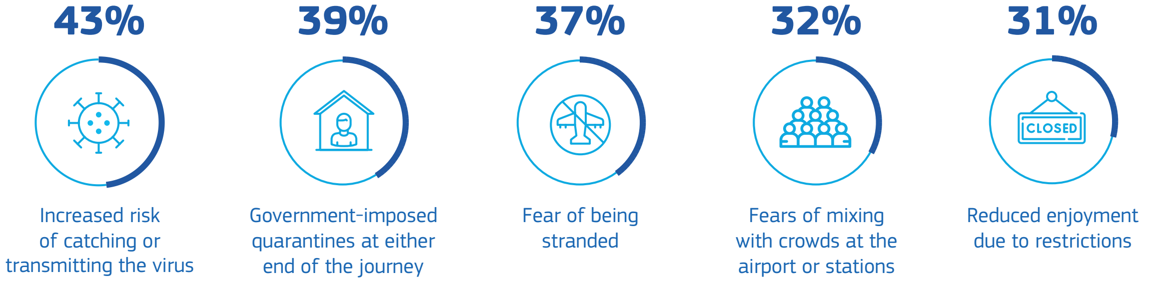
Note that throughout the reports reference to traveler / travelers refers to survey respondents, all of whom indicated they have traveled in the last 18 months.

Key overall findings will include:

- The majority of travelers say technology like mobile notifications alerting the traveler of changes and contactless payments and mobile boarding to reduce touch would increase their confidence to travel in the next 12 months.
- These trends continue when looking at the latest needs and wants from travelers. Travelers want technology to help with social and physical distancing, regular updates in uncertain times and ensuring accuracy and effectiveness of national test, track and trace programs.
- Similarly, technology plays a key part in alleviating concerns with many travelers citing that availability of full information and contactless payment experiences would make them more likely to travel.
- Looking to the future, more travelers expect to make fewer trips over the next 12 months due to their confidence over the safety of travel rather than government travel restrictions. A good proportion of these travelers 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 while many would also like touchless/contactless payments to be accepted around the globe.

Traveler Sentiment

When posed with several current concerns about travel, we found, not surprisingly, yet still important to establish, that the five biggest concerns about traveling in light of COVID-19 among survey respondents are:



While there has been much focus in the news about cancellations and refunds, we found that travelers are aware of new purchasing policies introduced by travel suppliers to decrease the risk in purchasing travel, since losing money if trips are cancelled (26%) was less important than concerns about health, last-minute disruption and social distancing.

Generational differences around travel concerns: younger generations are more concerned about hygiene and sanitation while older generations focus on social distancing

Interestingly, when looking at age demographics, it appears that younger generations are more concerned about hygiene and sanitation while older generations are more concerned about physical distancing and the travel experience. For example, Baby Boomers (55-74 years old) are the most likely age group to be most concerned about mixing with crowds in airports or at transport hubs such as stations (40%), the inability to enforce social distancing on planes (39%) and reduced enjoyment of the travel experience due to restrictions at destination (36%).

Meanwhile, Millennials (25-39 years old) were the most likely of all age groups to be most concerned that accommodation is adhering to necessary health and safety guidelines (e.g. deep cleans in between guest stays) (29%), the safety and cleanliness of public transport (32%) and trusting car hire companies are adhering to necessary health and safety guidelines (e.g. deep cleans in between users) (17%).

Country comparisons around travel concerns: France is an outlier when it comes to concerns around the increased risk of catching or transmitting the virus

When it comes to the various countries, most markets said that their biggest concern about traveling in light of COVID-19 was the increased risk of catching or transmitting the virus: in the UK (48%), US (42%), India (39%), Germany (38%) and Singapore (56%). The outlier here was France, where fears of being stranded in the destination if travel options are cancelled or changed (42%) and government-imposed quarantine at destination or upon return home (42%) had a higher percentage than increased risk of catching or transmitting the virus (32%). However, over 2 in 5 travelers in the UK (41%) also said one of their biggest fears when traveling in light of COVID-19, is the fear of being stranded in the destination if travel options are cancelled or changed.

Over half (54%) of travelers in Singapore said government-imposed quarantine at destination or upon return home was one of their biggest concerns about traveling in light of COVID-19, compared to less than 3 in 10 (27%) travelers in the US. Another notable difference was that over a fifth (22%) of travelers in India said one of their biggest concerns was access to information on which destinations are safe to travel to, compared to 1 in 10 travelers in France (10%) and the UK (10%).

Meanwhile, European travelers seem to not be as concerned by needing to trust that car hire companies are adhering to necessary health and safety guidelines retrospectively, as less than 1 in 10 travelers in the UK (6%), France (8%) and Germany (9%) said this was one of their biggest fears when traveling in light of COVID-19. Further, over a third (35%) of UK travelers said one of their biggest concerns when traveling in light of COVID-19, is the inability to enforce social distancing on planes. When compared to their neighbors, just under a fifth French travelers felt the same

Almost 2 in 5 (37%) UK travelers said concerns over losing money if trips are cancelled was one of their biggest concerns about traveling in light of COVID-19, compared to just over a fifth (21%) of US travelers. And, interestingly, having to wear facemasks for long periods of time, seem to be a barrier to travel for UK (32%) and German (30%) travelers as at least 3 in 10 in each country said this was one of their biggest concerns when traveling in light of COVID-19.

Understanding traveler preferences

It's important for the travel industry to understand traveler preferences and how they have changed due to COVID-19 in order to adapt and recover. The research explores what travelers would need to be fulfilled in order to feel comfortable traveling, and just 4% of travelers saying that there are no conditions that would need to be fulfilled for them to feel comfortable traveling. The top five most cited conditions that travelers need to be fulfilled to feel comfortable traveling are:

1. Flexible change and cancellation policies and payment terms to avoid penalty or losing money **(39%)**
2. Limiting the number of passengers on the plane to reduce contact **(38%)**
3. Being able to socially or physically distance throughout the journey (transport, airport terminals, transfers, hotels) **(36%)**
4. Visibility to and assurance of sanitization, hygiene and safety measures in hotels and other accommodations **(36%)**
5. Effective test, track and trace programs in place to contain infections **(34%)**

While these are mainly centered around sanitation and social distancing, technology plays a key role here. Indeed, 3 in 10 (30%) travelers said that they would need technology that reduces human contact, queues and physical touchpoints to be fulfilled to feel comfortable traveling, while the same percentage (30%) said they would need on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance. Interestingly, only 23% said good deals and discounts while less than 3 in 10 (27%) said the ability to comfortably wear a mask throughout the journey.

Generational differences in travel preferences: stark contrasts appear when it comes to social distancing

When it comes to generational differences, there is a stark difference between older and younger generations when it comes to social distancing. For example, while almost half (47%) of Baby Boomers (55-74 year olds) say that they would need to be able to socially or physically distance throughout the journey to feel comfortable, less than 3 in 10 (27%) of Gen Z (16-24 year olds) say the same. Interestingly, technology that reduces human contact, queues and physical touchpoints is most important to Millennials (25-39 year olds) (33%) but on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance is most important to Baby Boomers (55-74 year olds) (35%).

Country comparisons in travel preferences: social distancing is more important to travelers in Singapore than France

Looking at the countries, being able to socially or physically distance throughout the journey (transport, airport terminals, transfers, hotels) is most important to travelers in Singapore to feel comfortable traveling (45%) and least important to travelers in France (28%). Similarly, having effective test, track and trace programs in place to contain infections is most important to travelers in Singapore (45%) but least important to travelers in France (26%).

Two in 5 (40%) travelers in India say they would need technology that reduces human contact, queues and physical touchpoints to be fulfilled to feel comfortable traveling while well over a third (38%) of travelers in Singapore would need on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance.

Almost 2 in 5 travelers in both the UK (39%) and US (38%) say they'd need to be able to socially or physically distance throughout the journey for them to feel comfortable traveling. French travelers seemingly care the least about limiting the number of passengers on the plane to reduce contact (27%), whilst over 2 in 5 (42%) UK travelers say they'd need a limited number of passengers to feel comfortable.

Two in 5 (40%) UK travelers say they'd need to not have to self-isolate at the destination or on return home for them to feel comfortable traveling, which is significantly higher than just under a quarter (24%) of US travelers. Less of a priority is perceived safety of the destination for US and Germany as just under a third (32% each) of both US and German travelers say they'd need to feel as though it is a 'safe' destination, for them to feel comfortable traveling. In addition, just under double the amount of US travelers than German travelers say they'd need the ability to comfortably wear a mask throughout the journey to feel comfortable traveling (31% compared to 16%).

Once again, the data makes it clear that consumers want to be assured that they can be physically distant from one another, be up-to-date with the latest information and be assured that measures are being taken in terms of hygiene and sanitation as well as to test and trace.

Technology as tools to re-build traveler trust

Technology receptiveness among travelers: social distancing and regular updates in uncertain times remain key

It’s important to look not only at what is needed but what is wanted, as fulfilled desires can increase customer satisfaction and turn an average experience to a great experience. Further, desires and wants can often reveal where the consumer pain points lie.

The top five things travelers would most like technology to do for travel is:

1. Reduce queues and congestion in public spaces **(38%)**
2. Minimize my face-to-face or physical contact with others **(31%)**
3. Protect my financial data and personal information **(31%)**
4. Notify in advance when there is a delay **(29%)**
5. Ensure the accuracy and effectiveness of national test, track and trace programs **(28%)**

Lower on the list but still notable is that over a quarter (27%) of travelers say they would most like technology to offer support/options to manage disruption (e.g. rebooking, manage hotel compensation if needed, etc.) and the same percentage (27%) say they would most like technology to provide access to support if needed throughout my trip, holiday or vacation. Just slightly less (26%) of travelers say they would most like technology to reduce the need for to have physical documents.

Once again, there are trends indicating the latest needs and wants from travelers around social distancing, regular updates in uncertain times, and reassurance that health measures are being taken seriously.

Generational differences in technology and the desires of the traveler: older generations want technology to help with social distancing while younger generations focus on experience

The age demographics vary in what they would most like technology to do for travel. For example, Baby Boomers (55-74 year olds) surveyed are the most likely (48%) of the age groups to want technology to reduce queues and congestion in public spaces as well as being the most likely (35%) age group to want technology to minimize their face-to-face or physical contact with others; this echoes the earlier data where older generations are more concerned around social distancing than younger generations. Millennials (25-39 years old), on the other hand, are the most likely of the age groups to want technology to help make booking travel easier, more intuitive and tailored to their needs, demonstrating a desire for a more personalized experience. Millennials (25-39 years old) are also the most likely of the age groups to want technology to help them to reduce the environmental impact of travel (24%), debunking the common perception that it’s Gen Z (16-24 years old) who are the most active in environmental concerns.

Country comparisons in technology and the desires of the traveler

Similar to how technology can increase confidence, travelers in Singapore and India have the highest percentages of respondents who would like technology to improve the travel experience. For example, over 2 in 5 (45%) of travelers in Singapore would most like technology to reduce queues and congestion in public spaces; while over a quarter (27%) of travelers in India would most like technology to provide more accurate recommendations when they are searching for travel, the highest across the countries.

Regarding a personalized experience, more than double the amount of US travelers (26%) say they'd most like technology to make booking travel easier, more intuitive and tailored to their needs compared to German travelers (12%). Meanwhile, just over a quarter of French and US travelers (26% each) say they'd most like technology to provide access to support if needed throughout their trip, holiday or vacation when thinking about travel.

Looking further into physical contact and social distancing, a quarter (25%) of UK travelers and just over a quarter (26%) of US travelers say they'd most like technology to reduce the need for them to have physical documents when thinking about travel. In addition, 3 in 10 German and UK travelers (30% each) say they'd most like technology to minimize their face-to-face or physical contact with others.

Technology and increasing confidence

Majority of travelers say technology would increase their confidence

Technology and innovation will be key in building traveler confidence and industry recovery. This is illustrated as over 4 in 5 (84%) travelers say technology would increase their confidence to travel in the next 12 months.

The data revealing concerns surrounding last-minute disruption and fears of being stranded and the statistics around confidence echo this. Indeed, the most cited technology that would increase confidence to travel in the next 12 months are mobile applications that provide on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance (42%). The same percentage (42%) say contactless payments (e.g. Apple or Google pay, PayPal, Venmo) would increase their confidence to travel in the next 12 months and just slightly less (39%) say mobile boarding (e.g. having your boarding pass on your mobile phone). Further, over a third (36%) say self-service check-in would increase confidence to travel in the next 12 months and 34% say automated cleaning processes e.g. cleaning robotics. Three in 10 (30%) say facial recognition technology (e.g. at security checks or airport or hotel check-in) while just slightly less (29%) say self-scanning luggage. Finally, 1 in 5 (20%) say voice recognition technology (e.g. for hotel service requests) would increase confidence to travel in the next 12 months.

Generational differences in technology increasing confidence: Millennials most receptive to technology

Technology as a means to increase confidence resonates the most with Millennials (25-39 years old) across all technologies tested. For example, almost half (48%) of Millennials (25-39 years old) say mobile applications that provide on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance, would increase their confidence to travel in the next 12 months, less than a third (32%) of Baby Boomers (55-74 years old) say the same. Similarly, over a third (35%) of Millennials (25-39 years old) say facial recognition technology (e.g. at security checks or airport or hotel check-in) would increase their confidence compared to a quarter (25%) of Baby Boomers (55-74 years old).

Country comparisons in technology increasing confidence

Over double the amount of UK travelers (29%) say no technologies would increase their confidence to travel in the next 12 months, when compared to US travelers (12%). Travelers in India are the most likely of countries to have said the various technologies would increase their confidence to travel in the next 12 months, with the exception of self-service check-in and mobile applications that provide on-trip notifications and alerts, where travelers in Singapore had the highest percentage. For example, while over half (54%) of travelers in India say contactless payments would increase their confidence to travel in the next 12 months, just over a third (36%) of travelers in Germany say the same. Further, well over 2 in 5 (45%) travelers in India say facial recognition technology would increase their confidence to travel in the next 12 months, while just a fifth (20%) of travelers in Germany say the same.

European travelers seem to be in sync when it comes to what technologies would increase their confidence to travel in the next 12 months. This being the case, as a third of travelers in Germany (33%) and France (33%) and just over a third of travelers in the UK (34%) say mobile applications that provide on-trip notifications and alerts would increase their confidence to travel. European travelers also have similar mindsets when it comes to plane boarding technologies as just under a third of French (31%) and German travelers (32%) and a third of UK travelers (33%) agree mobile boarding would increase their confidence to travel in the next 12 months.

Interestingly, UK and German travelers are seemingly the least impressed with automated cleaning processes when it comes to travel needs, as just under a quarter from both countries (24%) said automated cleaning processes would increase their confidence to travel in the next 12 months.

Travelers want more information at the touch of a button

For the respondents who have concerns about traveling in light of COVID-19, over 2 in 5 (44%) say the technology experience that would make them more likely to travel would be availability of full information (e.g. what is open, what Government restrictions are in place, what quarantine) at point of search, booking and just before travel. 2 in 5 (40%) of these same respondents said contactless payment experiences at the airport, in-flight, ground transport and accommodations would make them more likely to travel and almost 2 in 5 (39%) said contactless experiences at hotels. For over a third (34%), biometrics (i.e. facial or voice recognition) to enable check-in, pass-through security and boarding without the need for physical checks would make them more likely to travel.

Generational differences and technology as a means to alleviate concerns

Millennials (25-39 years old) are the most receptive to technology experiences making them more likely to travel even considering their biggest concerns across all areas with one exception. For example, while almost half (48%) of Millennials (25-39 years old) who have concerns about traveling due to COVID-19 say that availability of full information (e.g. what is open, what Government restrictions are in place, what quarantine) at point of search, booking and just before travel would make them more likely to travel, compared to 38% of Gen Z (16-24 years old). The exception was that Gen X (40-54 years old) are the most likely (35%) of the age groups to say that contactless baggage check-in at the airport would make them more likely to travel.

Country comparisons and technology as a means to alleviate concerns

Again, in a similar trend to before, it was travelers in India and Singapore who were the most receptive to technology making them more likely to travel when thinking about their biggest concerns. Over half (52%) of travelers in Singapore say that contactless experiences at hotels, includes mobile check-in and check-out, keyless entry and voice activated room service would make them more likely to travel and almost 3 in 5 (56%) say availability of full information at point of search, booking and just before travel would make them more likely to travel. In India, almost half (47%) say that mobile applications informing of the destination city's safety measures and requirements would make them more likely to travel and the same percentage (47%) say biometrics (i.e. facial or voice recognition) to enable check-in, pass-through security and boarding without the need for physical checks would make them more likely to travel.

Delving into technology enabling the reduction of touch, just over a third (34%) of UK and German travelers who have any biggest concerns about traveling in light of COVID, say they would be more likely to travel if they were able to have a contactless payment experience at the airport, in-flight, ground transport and accommodations. Further, just over a third (34%) of US travelers who have any biggest concerns about traveling in light of COVID said a universal digital traveler identification stored on their mobile phone that enables one identity check during their entire trip would make them more likely to travel, compared to just under a quarter (24%) of UK travelers.

In other areas of technology, UK and German travelers who have any concerns about traveling in light of COVID, were the least receptive travelers to remote baggage check-in away from the airport as only 1 in 6 (16% each) said this technology experience would make them more likely to travel, compared to a quarter (25% each) of both French and US travelers.

And, being informed is more important to US travelers than French travelers. Indeed, almost half of US travelers who have any concerns about traveling, in light of COVID (47%) say availability of full information at point of search, booking and just before travel would make them more likely to travel, compared to only a third of French travelers who have any concerns about traveling in light of COVID (33%).

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 contact 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 increased 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.