Rebuild Travel Survey

2021

Introduction

The second year of the COVID-19 crisis has continued to challenge the travel industry; however, we have seen progress as we explore new ways to rebuild travel. As travel opens up around the world, Amadeus, a global leader in travel technology, continues to focus on the needs of the traveler and how to get the world traveling safely again. Over the last 12 months, Amadeus commissioned three global traveler surveys to understand traveler sentiment during this unique time. This latest traveler research focuses on attitudes on travel as well as concerns, sentiment towards travel health data, openness to technology, and sustainable travel.

Censuswide surveyed respondents between 2nd-14th September, 2021, across nine markets, including France, Germany, India, Russia, Singapore, Spain, the UAE, the UK and the US, who've traveled abroad in the last 18 months, with 1,000 respondents per market. The survey aims to understand traveler sentiment to safe travel in light of COVID-19 as restrictions begin to ease in some areas around the world. Similar reports focused on the nine countries surveyed can be found here.

Travel restrictions and guidelines

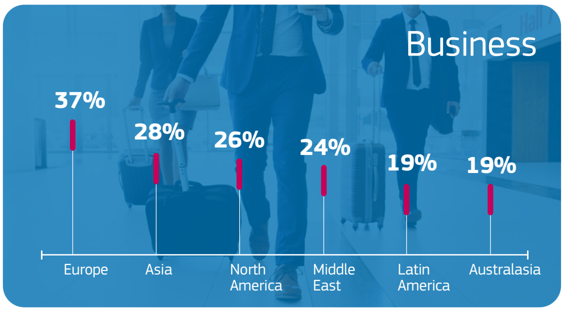
75%+

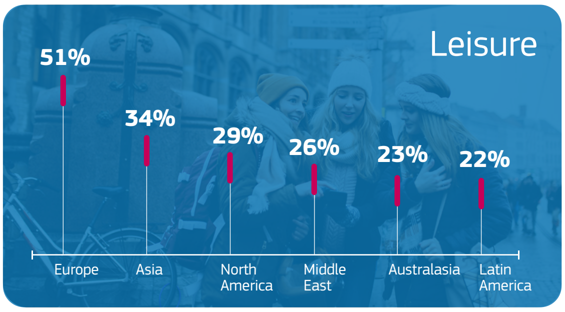
Over three quarters of travelers surveyed agree[1] that they are eager to travel and hope to do so in the next year

Travel expectations in the next year

Looking ahead to the next year, over three quarters (77%) of travelers surveyed agree[1] that they are eager to travel and hope to do so in the next year. Half (50%) agree[1] that they will be traveling for business to a destination requiring a flight later this year. The lists below provide more detail about the percentage of respondents who expect to travel to that region in the next year, broken down by those stating they will go for business and those for leisure.

Furthermore, travelers expect to take an average of two trips over the next year. This hopefulness and expectation of multiple trips should be some welcome news for the travel industry.





Country differences for travel expectations in the next year

High percentages of respondents in all countries agree[1] that they are eager to travel and hope to do so in the next year, with Russia at the highest end (87%) and the UK at the lowest (69%). With that said, trends indicate that perhaps travelers will be remaining close to their home country, rather than traveling further afield. For example, Spanish (46%), British (40%) and German (41%) respondents say they expect to travel to Europe for business in the next year - and higher percentages say the same for leisure (64%, 56% and 62%, respectively) – less than 2 in 5 US (37%) and Singaporean (32%) respondents say the same.

Similarly, Singaporean travelers surveyed are the most likely to say they expect to travel within Asia (excluding the Middle East) for business (45%) or leisure (55%) in the next year and US travelers surveyed are the most likely to expect to travel within North America for business (39%) or leisure (53%). Again, demonstrating the same trend, travelers from the UAE are the most likely to say they expect to travel within the Middle East for business (51%) or leisure (47%).

Generational differences for travel expectations in the next year

What is a stand-out from across the generations is that Millennials surveyed are the most likely to expect to travel for business across all regions in the next year. Comparatively, Gen Z surveyed are the most likely to expect to travel to Asia, North America, Latin America, Australasia, and the Middle East for leisure in the next year, but bucking this trend is the Baby Boomer generation who are the most likely to expect to travel to Europe for leisure in the next year. However, overall, Baby Boomers surveyed are the most likely to agree[1] that they are eager to travel and hope to do so in the next year (84%), followed by Gen X (78%), Millennials (77%) and Gen Z (72%).

The impact of travel restrictions and guidelines

The travel industry continues to face disruption with various restrictions still in place across the globe for travelers and less than 2 in 5 (38%) travelers surveyed agree[1] that the current international restrictions and guidelines around where and how to travel are clear - making it easy for them to book and travel for business/ leisure. On the contrary, 35% agree[1] that the current international restrictions and guidelines around where and how to travel are confusing and unclear - making them less likely to book and travel for business/ leisure and a further 27% agree[1] they will not be traveling internationally due to the unclear guidance around restrictions.

Country differences regarding the impact of travel restrictions and guidelines

Travelers in Russia are by far the most likely to agree[1] that the current international restrictions and guidelines* around where and how to travel are clear - making it easy for them to book and travel for business/ leisure (53%) and travelers in the UK by far the least likely to agree[1] with this (25%). In between these are Spain (42%), France (38%), the UAE (38%), India (36%), the USA (36%), Singapore (36%) and Germany (34%).

UK travelers surveyed are the most likely to agree[1] that the current international restrictions and guidelines around where and how to travel are confusing and unclear - making them less likely to book and travel for business/ leisure (45%), and respondents in Russia are the least likely to agree[1] with this (27%). However, UK travelers and Singaporean travelers are both the most likely (34%) to agree[1] that the current international restrictions and guidelines around where and how to travel are confusing and they will not be traveling internationally due to the unclear guidance around restrictions. Russian travelers surveyed are, again, the least likely to agree[1] with this (17%). In between these two countries sit India (32%), the USA (28%), Germany (25%), France (24%), the UAE (24%) and Spain (21%).

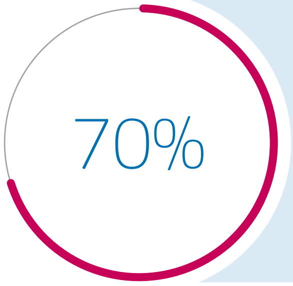
Generational differences regarding the impact of travel restrictions and guidelines

Although the differences between generations are less pronounced than differences between countries, Gen X travelers surveyed are the most likely to agree[1] that the current international restrictions and guidelines around where and how to travel are clear - making it easy for them to book and travel for business/ leisure (40%), followed by Baby Boomers (40%) and Millennials (38%), while Gen Z (32%) are the least likely to agree[1].

Moreover, Gen Z are the most likely to agree[1] that the current international restrictions and guidelines around where and how to travel are confusing and unclear and they will not be traveling internationally due to the unclear guidance around restrictions (30%), followed by Millennials (27%), Gen X (24%) and Baby Boomers (24%).

What's apparent is that there is a great appetite for travel over the next year, but confusion over the various restrictions and guidance is causing issues for many travelers.

Sentiments towards travel health data



7 in 10 travelers surveyed would be willing to provide personal information and health data using digital health passports/ certificates for international travel

7 in 10 (70%) travelers surveyed would be willing to provide personal information and health data using digital health passports/certificates for international travel. Travelers seem less willing to provide this information for domestic travel (e.g., staycations) (45%); however, and fewer would be willing to share this for office or business events/conferences (39%). Less than 2 in 5 (35%) respondents would be willing to provide personal information and health data using digital health passports/certificates for an excursion or activity at the destination. Just 7% of respondents would not be willing to provide personal information and health data in any environment for the effective use of digital health passports/certificates.

Country differences regarding digital health passports/certificates

With 78% agreeing, Spanish travelers surveyed are the most likely to be willing to provide personal information and health data using digital health passports/certificates for international travel, followed by travelers in Singapore (77%), UAE (77%), Russia (73%), India (72%), Germany (70%), France (64%), UK (58%) and the USA (58%). Moreover, travelers in India are the most likely to be willing to provide personal information and health data using digital health passports/certificates for domestic travel (49%), followed by travelers in France (48%), USA (47%), Spain (46%), Singapore (44%), Russia (44%), the UAE (43%), Germany (43%) and the UK (38%).

Generational differences regarding digital health passports/certificates

Baby Boomers surveyed are the most likely to be willing to provide personal information and health data using digital health passports/certificates for international travel (77%), Gen X (72%), Millennials (71%) and Gen Z (61%), which echoes the same results for the percentage that agree[1] they are eager to travel and hope to do so in the next year. Older generations also seem more willing to share health data for domestic travel as Baby Boomers are the most willing to provide personal information and health data using digital health passports/certificates for domestic travel (49%), followed by Gen X (46%), Millennials (45%) and Gen Z (42%).

Concerns and confidence

Fears of catching COVID-19 while traveling and self-isolation/quarantine are the biggest concerns about traveling in light of COVID-19

The three biggest concerns about traveling in light of COVID-19 are:

Fears of catching COVID-19 while traveling from lack of social distancing, wearing of masks, etc. (41%)

Self-isolation/ quarantine before and after travel (41%)

Changing restrictions resulting in last minute cancellations (37%)

These concerns are greater than ones related to changing restrictions without a refund on bookings already made (34%), cost of testing before and after travel (29%), increased queues while traveling due to additional document checks (26%) and requirement of proof of vaccination (22%). Just 3% of travelers surveyed said they don't have any concerns.

Country differences in concerns while traveling in light of COVID-19

Travelers from France are the most likely to not have any concerns about traveling in light of COVID-19 (7%), followed by travelers from the USA (6%), Germany (4%), the UK (3%), Spain (3%), the UAE (3%), Russia (3%), India (2%), and Singapore (1%). The top concern differs across countries. Indeed, for travelers in Spain (49%), Germany (39%), Russia (39%) and France (41%), the top concern traveling in light of COVID-19 is self-isolation/quarantine before and after travel. For travelers in India (54%), the USA (43%), the UAE (45%) and Singapore (54%), however, the top concern is fear of catching COVID-19 while traveling from lack of social distancing, wearing of masks, etc. The key outlier is travelers in the UK, where the top concern is the cost of testing before and after travel (34%).

Age differences in concerns while traveling in light of COVID-19

Younger generations seem more concerned about catching COVID-19 while traveling while older generations seem more concerned about having to isolate. In more detail, the top concern for Gen Z (41%) and Millennial (42%) respondents is fears of catching COVID-19 while traveling from lack of social distancing, wearing of masks, etc. However, the top concern for Gen X (43%) and Baby Boomer (48%) respondents is self-isolation/quarantine before and after travel.

Technologies that will increase confidence to travel in the next 12 months

Technology and innovation seem to be key in building traveler confidence and the recovery of the industry, illustrated by the fact that just 3% of respondents said that no technology would increase their confidence to travel in the next 12 months. The top five technologies that would increase confidence to travel in the next 12 months are:

Mobile applications that provide on-trip notifications and alerts	Self-service check-in	Contactless mobile payments, e.g., Apple Pay	Automated and flexible cancellation policies	Mobile boarding
44%	41%	41%	40%	40%

These are followed by apps to store digital health data on devices (39%), different methods of payment (e.g., pay when you fly, vouchers) (35%), self-scanning luggage (35%) and facial recognition technology (30%).

Country differences: Technologies that will increase confidence to travel in the next 12 months

Across all countries, percentages are low for the number of respondents who say no technology will increase their confidence to travel in the next 12 months – with France and the USA at the highest end but still just 6%.

The top technology for increasing confidence to travel in the next 12 months differs per market, however. For respondents in the UK (40%), the USA (43%), the UAE (49%) and Singapore (53%) the top technology that would increase confidence is self-service check-in. However, for respondents in Spain (51%), Germany (42%) and France (44%), the top technology is automated and flexible cancellation policies. The outliers here are respondents in India where the top technology that would increase confidence is mobile applications that provide on-trip notifications and alerts (55%), and Russia where the top technology is contactless mobile payments (48%).

Age differences: Technologies that will increase confidence to travel in the next 12 months

Baby Boomers surveyed are the most likely to say no technology would increase their confidence to travel in the next 12 months (7%), followed by Gen X (5%), Gen Z (4%) and Millennials (2%). For Gen Z (40%), Millennials (44%) and Gen X (44%), the top technology that would increase their confidence to travel in the next 12 months are mobile applications that provide on-trip notifications and alerts; however, for Baby Boomers it's automated and flexible cancellation policies (49%).

Sustainable travel

40%+

Well **over 2 in 5** travelers surveyed believe greater availability or accessibility to green modes of transport will help the industry to become more sustainable in the long term

Sustainability in the travel sector is a common discussion point and well over 2 in 5 (46%) travelers surveyed believe greater availability or accessibility to green modes of transport, e.g., electric planes/trains will help the industry to become more sustainable in the long term. A similar percentage (44%) think making sustainable travel more cost effective will help the industry to become more sustainable in the long term and just over 2 in 5 (41%) say the same of transparency around travel companies' sustainability policies. Furthermore, 2 in 5 (40%) respondents believe solar or wind-powered technologies to power hotels, attractions, and destinations will help the industry to become more sustainable in the long term. Finally, 37% of travelers surveyed think opportunities for travelers to be involved in the preservation of tourist destinations will help the industry to become more sustainable in the long term and 32% say the same of public reporting on the impact of sustainability initiatives.

Country differences: factors that will help the industry to become more sustainable in the long term

Travelers in India are the most likely to believe that public reporting on the impact of sustainability initiatives will help the industry to become more sustainable in the long term (40%), followed by travelers in Spain (37%), Singapore (37%), the UAE (35%), the USA (30%), Russia (32%), the UK (27%), Germany (26%) and finally, France (24%).

Meanwhile, from the factors tested, travelers in the UK (43%), Spain (51%), Russia (46%), India (51%), the USA (39%), the UAE (49%) and Singapore (53%) are most likely to believe greater availability or accessibility to green modes of transport, e.g., electric planes/trains will help the industry to become more sustainable in the long term. However, travelers in Germany (46%) and France (42%), are most likely to believe that making sustainable travel more cost-competitive will help the industry to become more sustainable in the long term.

Age differences: factors that will help the industry to become more sustainable in the long term

Gen Z (45%) and Millennials (46%) surveyed are most likely to believe greater availability or accessibility to green modes of transport, e.g., electric planes/trains will help the industry to become more sustainable in the long term, among the factors tested. However, Gen X (49%) and Baby Boomer (51%) travelers surveyed are most likely to believe that making sustainable travel more cost-competitive will help the industry to become more sustainable in the long term.

**Restrictions and guidelines in place in September 2021 when the survey was conducted.*
[1]Net agree: combines 'strongly agree' and 'somewhat agree'

Conclusion

Amadeus is committed to supporting the industry to rebuild travel. The travel industry is at a critical stage as demand for travel is growing as we see some restrictions ease, but traveler concerns still exist and must be addressed with innovative solutions to help increase confidence as quickly as possible and for the long-term.

When it comes to the concerns around traveling in light of COVID-19 we have seen an increase in anxiety around last minute cancellations, refunds and a growing demand for apps or solutions where digital health data and travel information can be stored in one place. The survey shows a willingness to use technology to help combat these concerns, which sends a positive message to our industry: by working together we can rebuild travel better. This is echoed in traveler sentiment towards sustainable travel, too. Conversations on sustainable travel have been accelerated by the pandemic and Amadeus is committed to supporting travelers and our customers to help make sustainable travel a reality and understanding traveler sentiment towards different solutions.

Sentiment towards digital health data varies globally, but digital health verification will be increasingly important to help increase traveler confidence and enable smoother travel experiences. This technology involves multiple stakeholders who need to work together. This is why Amadeus has developed the Safe Travel Ecosystem, a global program designed to help the industry overcome these challenges and accelerate recovery.

Digital health passports or certificates – whether to demonstrate health checks or vaccination status – need to be fully integrated into airline, airport and hospitality systems to avoid creating customer pain points, or friction, along the journey. In addition, travelers need to know that their personal information is safe and secure, and that they are in control of how it is used.

This is why Amadeus has added capabilities to Traveler ID, a secure platform for its travel provider customers, that connects, digitizes and automates traveler identification and document validation across the traveler journey, while meeting regulatory requirements. This platform connects the health certification touchpoints end-to-end, integrating multiple stakeholders involved in the process, providing a secure and frictionless way for passengers to show that they have the necessary health documentation to travel. Stakeholders connected with Traveler ID for Safe Travel include digital health passes such as IBM Digital Health Pass, and the medical testing company CENTOGENE, which allows the health documentation to be validated and authenticated during the check-in process.

Importantly, for airlines and airports, this solution can be integrated directly into their own digital channels, removing operational complexity and facilitating a smooth traveler experience. Amadeus continues to work in partnership with customers and partners to innovate and deploy technology that improves both the traveler experience and operational efficiency.