Rethink Travel Global Survey
UK insights

2020

Introduction

As of 20th October 2020, government statistics show the United Kingdom has recorded almost 900,000 confirmed cases resulting in nearly 45,000 deaths attributed to COVID-19. The impact to the country has been devastating, resulting in thousands of job losses, many of those jobs in travel, tourism and hospitality.

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 UK market[1]. Similar reports focused on the other five countries plus a global report can be found at **amadeus.com/rethinktravel**

[1] 1,030 respondents who've traveled abroad in the last 18 months in the UK
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

UK insights

The biggest concerns about traveling

The biggest concern, for almost half of UK travellers[2] (48%) is the increased risk of catching or transmitting the virus, followed by the fear of being stranded in the destination if travel options are cancelled or changed (41%) and Government-imposed quarantines at either end of the journey (40%).

48%	41%	40%
Increased risk of catching or transmitting the virus	Fear of being stranded	Government-imposed quarantines at either end of the journey

Fewer UK respondents who have travelled on a long-haul flight in the last 18 months noted that **being stranded in the destination if travel options are cancelled or changed was one of their biggest concerns about traveling in relation to COVID, in comparison to those who have travelled on a short-haul flight** (39% vs 44%). Similarly, fewer respondents who have been on a long-haul flight in the last 18 months

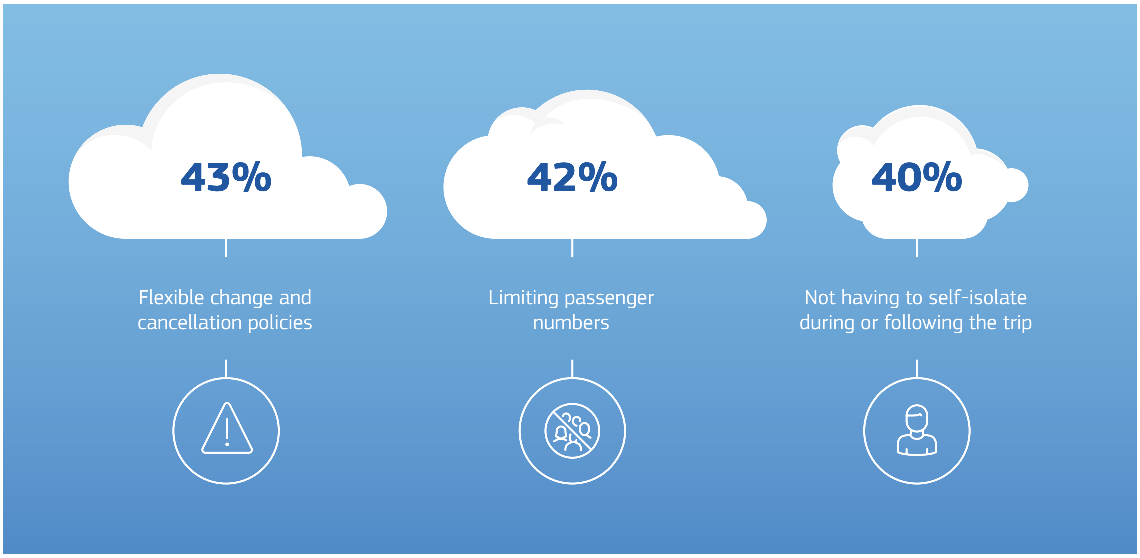
[2] Travelers refers to UK respondents who have traveled abroad in the last 18 months

noted that the Government imposing a quarantine at their destination or upon return home was one of their biggest concerns compared to short-haul flyers (41% vs 44%).

Different age groups also have different concerns: **Concern over the inability to enforce social distancing on planes rises steadily with age,** from 18% of Generation Z (16-24) who classed this as one of their biggest concerns about traveling, to 45% for Boomers (55-74).

What can be done to make people feel comfortable to travel again?

The biggest thing that UK travellers need for them to feel comfortable traveling is flexible change/cancellation policies and payment terms to avoid penalties or losing money, which was selected by 43% of respondents. This was followed by limiting passenger numbers on planes to reduce contact (42%) and not having to self-isolate during or following the trip (40%).



Some 3 in 10 (30%) UK travellers identified technology solutions as a source of comfort.[3] **Just under 2 in 5 (39%) respondents who have only travelled for leisure in the past 18 months identified that an effective test, track and trace program to help contain the spread of infection would need to be fulfilled for them to feel comfortable traveling.**

Technologies that would boost confidence in travel in the next 12 months

Contactless payments (37%), self-service check-in (36%) and mobile apps with COVID related notifications and guidance[4] (34%) were the most popular technologies that respondents noted would increase their confidence to travel in the next 12 months.

[3] 30% of UK respondents selected ‘Technology that reduces human contact, queues and physical touchpoints’ as a condition that would need to be fulfilled for them to feel comfortable traveling
[4] 34% of UK respondents who selected ‘Mobile applications that provide on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance’ as a technology that would increase their confidence to travel in the next 12 months

Respondents who have travelled on a long-haul flight in the past 18 months noted that voice recognition technology (15%) and automated cleaning processes (29%) would increase their confidence to travel in the next 12 months, more so than those who have travelled on a short-haul flight in the past 18 months (11% and 25% respectively). While short-haul travellers had a greater preference than long-haul travellers for getting updates via a mobile app to increase their confidence in traveling in the next year (35% vs 32%).

Age plays a big part in preferences here - Boomers were the most likely to report that there were no technologies that would increase their confidence to travel in the next 12 months (43%).

Technology enabled experiences that would address travellers' biggest concerns

80% of UK travellers who have any of the biggest concerns about traveling in light of COVID-19, responded that at least one of the suggested technologies could assuage their concerns and would make them more likely to travel.[5] The availability of comprehensive information was the most commonly selected technology experience that could address concerns and encourage respondents to travel (43%). This was followed by contactless payment experiences at the airport, in-flight, using ground transport and accommodations (34%) as well as contactless experiences at hotels including mobile check-in and check-out, keyless entry and voice activated room service (34%).

The role UK travellers want technology to play in the journey

Overall, the three biggest things that UK travellers most want technology to do when thinking about travel are:

- Reduce queues and congestion in public spaces (41%)
- Ensure the accuracy and effectiveness of national test, track and trace programs (31%)
- Minimise face-to-face or physical contact with others (30%)

Those surveyed who have travelled on a long-haul flight in the past 18 months, were more likely to want technology to reduce dependence on physical documents than those who have taken a short-haul flight within the same time period (29% vs 25%).

Age played a big factor here – older generations were much less likely to be interested in technology that makes booking travel easier, more intuitive and tailored to their needs (12% for boomers vs 21% for Generation Z) and technology that could help them reduce their environmental impact (12% for boomers vs 22% for Generation Z). Interest in technology providing an accurate and effective national test, track and trace program was reversed, increasing by age, from 25% for Generation Z to 38% for boomers.

[5] 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?' (20%)

Travellers' hopes and expectations for the future of travel

A narrow majority (55%) do not expect to make fewer trips due to travel restrictions in the next 12 months.[6] This gets narrower when looking at personal confidence in traveling – 53% do not expect to make fewer trips over the next 12 months because of their lack of confidence about the safety of travel in light of COVID-19[7].

43% agreed that they would like a **standardised global test, track and trace program to provide reassurance that any outbreaks can be addressed quickly,** while only 15% agreed that they would like to see more robots or automation throughout their traveling journey, from the initial travel agent to the airport and hotel.

Regional perspectives

- Having to wear masks for long periods of time is a big concern for just 15% of respondents in the South West of England, compared to 36% of respondents in the East Midlands.
- 42% of those in the East Midlands are concerned about enjoying their travel experience less due to the restrictions at destination.
- 40% of respondents from Wales specified that they'd need personal medical certificates or immunity certificates as a travel requirement to make them feel comfortable, compared to 22% across the country.

Conclusion

The survey demonstrates that there is a continued appetite for travel, however, travellers are clearly 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 and 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 travellers 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 traveller experience and operational efficiency.

[6] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to government travel restrictions' (45%)
[7] 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' (47%)

For our airline customers, we provide departure control solutions that accommodate 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 hygiene 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 travellers 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 all want to see.