amadeus

Rethink Travel Global Survey
US insights

2020

Introduction

By the end of October 2020, the United States surpassed 9 million confirmed cases and approached 231,000 deaths caused by COVID-19. The impact to the country has been devastating, resulting in millions of job losses, many of those jobs in travel, tourism and hospitality.

Given its role in the travel community as a global provider of technology to the travel industry, and knowing it requires a community response to get the world traveling again, Amadeus has been engaging with its customers and industry partners to rethink travel. This survey is part of the company's commitment to understand how to reignite traveler confidence, ultimately ensuring travel continues to be a key driver of global progress, positivity and prosperity.

This survey was conducted September 14-22, 2020, by global insight-driven research firm Censuswide. Its purpose is to explore traveler sentiment in light of COVID-19, how expectations and demands have changed, and what measures can be put in place to strengthen traveler trust and confidence.

CENSUSWIDE
THE SURVEY CONSULTANTS

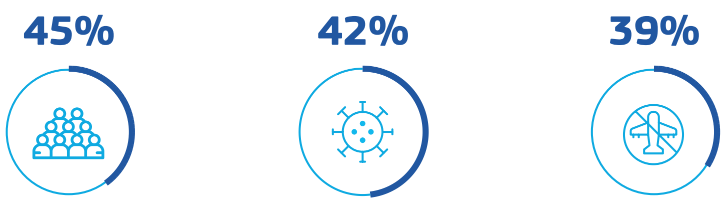
The following is a summary of findings in the United States[1]. Similar reports focused on the other five countries plus a global report can be found at **amadeus.com/rethinktravel**

[1] 1,004 respondents who've traveled abroad in the last 18 months in the US
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

U.S. insights

Traveler Concerns

The biggest concern for US travelers[1] (42%) is the increased risk of catching or transmitting the virus, followed by the safety and cleanliness of public transport (39%) and fears about mixing with crowds in airports and other transport hubs (34%).



But different kinds of travelers are concerned about different things. More US respondents who have traveled on a long-haul flight in the last 18 months noted that government-imposed quarantines at their destination or upon return home was one of the biggest

[1] Travelers refers to US respondents who have traveled abroad in the last 18 months

concerns about traveling in relation to COVID-19, in comparison to those who have traveled on a short-haul flight over the past 18 months (32% vs 25%). Half (50%) of respondents who have been on a long-haul flight in the last 18 months, noted that the increased risk of catching or transmitting the virus was one of their biggest concerns, in comparison to over 2 in 5 (45%) short-haul flyers

Business travelers less concerned about virus transmission compared to leisure

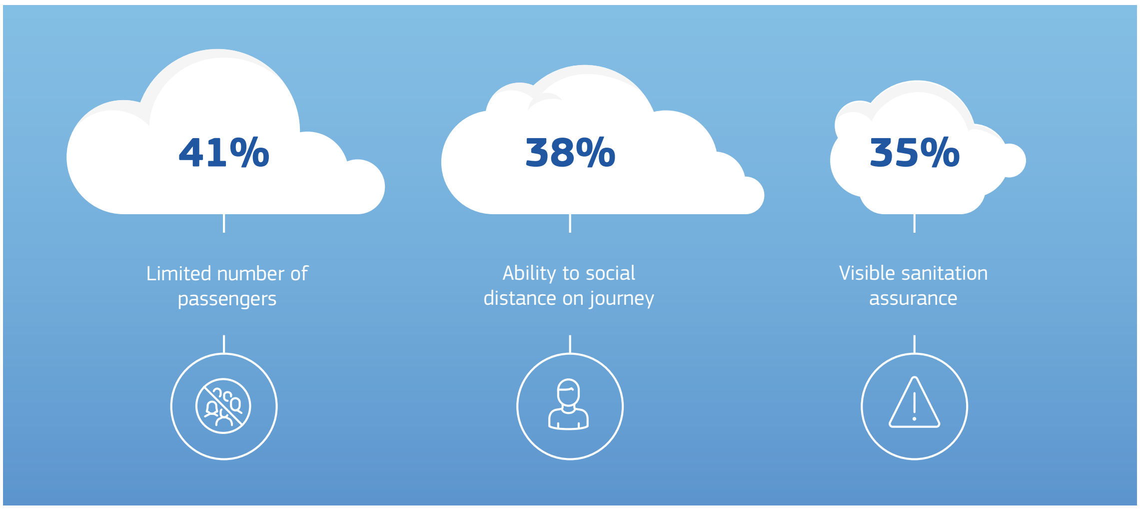
A quarter (25%) of US respondents who **traveled only for business in the past 18 months noted that the increased risk of catching or transmitting the virus was one of their biggest concerns about traveling in light of COVID-19. This was less than those who have just traveled for leisure in the past 18 months, which was almost half (48%).** However, more business travelers noted that access to information on which destinations are safe to travel to, was one of their biggest concerns about traveling, compared to those who traveled for leisure in the past 18 months (18% vs 11%).

Concerns can be addressed by age group

Different age groups also have different concerns: Gen X (ages 40-54) were the most likely to express concern around having to wear masks for a long period of time (39%) and government-imposed quarantines at their destination or upon return home (33%), while Baby Boomers (ages 55-74) were by far the most concerned about any single issue, with 75% indicating that the increased risk of catching/transmitting the virus was one of their biggest concerns. **Concern over social distancing on planes rises steadily with age from 17% for Generation Z to 46% for Baby Boomers.**

Building confidence in travel

The **biggest thing that US travelers noted as needing to be fulfilled to feel comfortable traveling is a limitation on the number of passengers on the plane to reduce contact,** selected by 41% of respondents, followed by being able to socially or physically distance throughout their journey (38%), and visible sanitation methods and assurance of sanitization, hygiene and safety measures in hotels and other accommodation (35%).



Social distancing was slightly more likely to be of comfort to respondents who have traveled on a long-haul flight in the past 18 months (43%) than those who have been on a short-haul flight within this time (40%). Though, 44% of both agreed that there would need to be limits on the number of passengers on planes to reduce contact, for them to feel comfortable traveling.

Overall only **28% of US respondents identified contact-reducing technological solutions[2] as a condition that would need to be fulfilled before they felt comfortable traveling** - dropping to only 22% for those who mainly travel for business.

Technologies that would increase confidence among US travelers in the next 12 months

Mobile apps that provide on-trip notifications and alerts, for example if there is a localized outbreak or changes in government guidance (42%), mobile boarding (41%) and self-service check-in (38%) were the most popular tech options that would increase respondents confidence to travel in the next 12 months.

Respondents who have traveled on a **long-haul flight in the last 18 months noted that self-scanning luggage (35%)** and automated cleaning processes (41%) would increase their confidence to travel in the next 12 months, more so than those who have traveled on a short-haul flight in the last 18 months (31% and 38% respectively). While **those who have traveled only for business in the past 18 months were more interested in facial recognition technology (30%) and voice recognition technologies (26%) to increase their confidence to travel in the next year,** than those who have traveled only for leisure (21% and 14% respectively).

95% of US travelers who have any biggest concerns about traveling in light of COVID-19, responded that at least one of the suggested technologies could ease their concerns and would make them more likely to travel[3]. Availability of full information **was the most commonly selected technology experience that could address concerns** and encourage respondents to travel (47%), followed by contactless technology at hotels (40%) and contactless experiences at hotels, includes mobile check-in and check-out, keyless entry and voice activated room service (40%) and contactless payment experiences at the airport, in-flight, ground transport and accommodations (40%). Remote baggage check-in away from the airport appealed to 25% of respondents.

Of all the groups investigated, **business travelers were the most likely to be reassured by technology** - 97% of respondents **who have any biggest concerns about traveling in light of COVID-19 and have traveled just for business in the last 18 months**, identified at least one of the suggested options as a technology experience that would make them more likely to travel[4].

[2] 28% of US 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

[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?' (5%)

[4] Inverse of respondents who have any biggest concerns about traveling in light of COVID-19 and have traveled just for business in the last 18 months, 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?' (3%)

What US travelers would most like technology to do for them

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

- Reduce queues and congestion in public spaces **(33%)**
- Protect financial data and personal information **(32%)**
- Minimize face-to-face or physical contact with others **(31%)**

Those surveyed who have traveled 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 24%).

Age was a factor as well - older generations were much more likely to be interested in tech reducing queues and congestion in public spaces (59% for Baby Boomers vs 19% for Generation Z) and minimizing face-to-face or physical contact with others (51% for Baby Boomers vs 23% for Generation Z). Generation X contained the highest proportion of people wanting tech to reduce the environmental impact of travel (30%, vs 20% for Generation Z and 16% for boomers).

Travelers' hopes and expectations for the future of travel

A majority (69%) of US travelers expect that they won't have to make fewer trips due to travel restrictions in the next 12 months[5]. This gets narrower when looking at personal confidence in traveling - 59% 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[6].

38% agreed that they would like a standardized global test, track and trace program **to provide reassurance that any outbreaks can be addressed quickly**, with an equal number interested in touchless/contactless payments to be accepted around the globe, so that they don't need to carry or exchange cash or input PIN numbers when traveling. Twenty-six percent (26%) expressed an interest in wanting to use biometrics when traveling to remove physical checks and reduce queues, rising to 32% for US respondents who have been on a long-haul flight in the past 18 months.

[5] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to government travel restrictions' (31%)
[6] 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' (41%)

Regional variations

- Having to wear masks for a long period of time is a biggest concern for **34%** of respondents in the Southwest, but just **25%** in the West noted it as one of their biggest concerns about traveling, in light of COVID-19
- Increased risk of catching or transmitting the virus is the biggest concern for **53%** of Chicago respondents, compared to **44%** of Los Angeles respondents and **43%** of New Yorkers
- The ability to limit the number of passengers on a plane is the top condition that would need to be fulfilled for **46%** of New Yorkers. Feeling as though a destination is safe is the top condition for **41%** of Los Angeles respondents
- Mobile boarding is the most selected technology that would increase traveler confidence in the next 12 months for 47% of Washington DC respondents

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.