amaDEUS

Rebuild Travel
Digital Health Survey

India

2021

Introduction

As the COVID-19 crisis has evolved, Amadeus, a global leader in travel technology, has been committed to better understanding what the traveler wants during and after this unique time. To gather more insights into how the travel industry can rebuild, this latest traveler research focuses on learning more about their top concerns around digital health data, their comfort levels with sharing and storing their data, and the solutions that may help to alleviate their concerns for future travel.

Censuswide surveyed respondents between 18-26 February, 2021, across nine markets, including UK, Spain, Germany, Russia, UAE, France, India, Singapore and the US, who've traveled abroad in the last 18 months, with 1,000 respondents per market. The survey aims to understand consumer sentiment to safe travel in light of COVID-19 and traveler receptiveness to providing digital health information to enable the opening up of travel. The survey also revisits the traveler sentiment issue, which was part of our first survey, in September 2020, to see if there are notable changes. Below are some of the key insights for the Indian market.

Similar reports focused on the other eight countries plus a global report can be found here.

Digital health passports will help make Indian travelers more likely to travel

- **Over three quarters (79%) of Indian travelers would be willing* to store their travel health data electronically if it meant it enabled them to travel sooner, 79% would be willing* if it enabled them to pass through the airport faster with fewer face-to-face interactions and 78% if it enabled them travel to more destinations.**

- **Almost 2 in 5 (57%) would be happy for a digital health passport to be used at all times when traveling,** while 7% would not be comfortable using a digital health passport for future travel under any circumstances.

- Respondents from East India are the least likely to use a digital health passport at all times when traveling (48%) compared to other regions, while travelers from West India are the most likely (61%).

- Travelers in India are more confident in providing health data for travel purposes (62%) or booking and checking in at a hotel (59%) when compared to doing so for working in an office (47%) or visiting a restaurant or bar (39%).

Security and privacy concerns remain the central challenge to digital health passport acceptance

- **The main concerns Indian travelers have in relation to data storage are security risks with personal information being hacked (34%), privacy concerns around what health information needs to be shared (34%) and a lack of transparency and control over where the data is shared (28%).**

  Overall, only 21% of Indian travelers are concerned about loss of information while traveling or before a journey and 24% are concerned about giving access to personal data to public authorities.

- **Skepticism around digital health passports is highest among Gen Z** (12% of Gen Z said they would not be comfortable using a digital health passport under any circumstances, which decreases to 5% and 4% for Millennials and Gen X respectively). Yet, this trend is reversed when it comes to security concerns, with 22% of Gen Z concerned about lack of transparency and control over where the data is shared, which rises to 31% and 30% amongst Gen X and Millennials respectively.

- There is also variation in the different kinds of travelers, with business travelers (23%) less concerned about what health information needs to be shared than leisure travelers (33%).

The checks and balances that need to be put in place to ease privacy concerns and build traveler confidence in digital health passports

- **Over half of Indian travelers (53%) would be comfortable using a digital passport if it was accepted by most countries and was regulated by international standards,** while 51% would be comfortable if only COVID-19-specific data was included in any health passport.

- Business travelers would be more comfortable using a digital passport if it was accepted by most countries and was regulated by international standards (45%), but this rises to 48% for leisure travelers.

- **8 in 10 (80%) would be more likely** to store health data on an app where a travel company has partnered with a trusted healthcare company.

- 82% of respondents said that they agreed*** that would be more likely to feel comfortable sharing health data if the airline they frequently travel with offered a way to store travel health data in an app, while 75% agreed*** that they would be open to downloading a new third-party app to store health data, irrespective of which airline or travel company they use.

- Having a travel app that could be used across the whole journey would greatly improve the overall travel experience (55%), reduce stress around travel (54%) and reassure that all information is in one place (51%).

Concerns remain around traveling in light of COVID-19

- **The biggest concern for Indian travelers is safety and cleanliness of public transport (56%),** followed by trusting that accommodation is adhering to necessary health and safety guidelines (49%). **Only 5% of travelers don't have any concerns about traveling in light of COVID-19.**

- **Different kinds of travelers are concerned about different things** – people who travel for business are less likely to be concerned about other travelers not wearing masks in public spaces and on forms of transport (30% vs 44% for leisure travelers), but more concerned about third parties adhering to necessary cleaning guidelines (39% vs 35% for leisure travelers).

- Fears about mixing with crowds in airports or at transport hubs were more acute in those aged 40-54 and 55-74 (56% and 67%, respectively), while families were more likely to be concerned about wearing a mask for long periods of time (51%) compared to solo travelers (44%).

The technologies that would increase confidence in travel among Indian respondents in the next 12 months

- **Mobile apps to provide on-trip notifications and alerts (51%), contactless payments (49%), facial recognition (48%) and mobile boarding (47%) continue to be popular technologies that respondents noted would increase their confidence to travel in the next 12 months.**

- Respondents who are leisure travelers were more likely to prefer mobile apps to provide on-trip notifications and alerts (50% vs 39% for respondents who are business travelers) and contactless payments (44% vs 37% for respondents who are business travelers).

- Indian travelers would be most comfortable using biometric facial recognition technology at boarding gates (57%), hotel check-ins (56%) and airport duty free shops (51%), but less likely at conferences and events (43%) and car rental pick up (42%).

- 31% of Gen Z would have their confidence to travel in the next 12 months increased by self-service check-in, but that rises to 45% for Millennials. **2% of Millennials said that no technology would increase their confidence to travel in the next 12 months compared to 6% of Generation Z.**

Conclusion

Amadeus is committed to supporting the industry to restart and rebuild travel. It recognizes that digital health verification will be increasingly important to both increase traveler confidence and assist in opening up international borders.

While the appetite for digital health verification among travelers, governments and the industry is high, it also presents challenges to the industry that need to be addressed by multiple stakeholders. 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 or airport 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 new 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. Privacy and security are central to the design of Traveler ID, ensuring that passengers choose when and where they want to provide digital evidence of their health status.

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 is also able to connect existing identity and health validation initiatives, such as CommonPass and ICC AOKpass, to accelerate global adoption, which is critical to unlock international travel in the coming months.

Beyond digital health data, the survey shows that there is an appetite for technology able to address the concerns of today's travelers, whether it is better access to information, ensuring social distancing or reducing physical contact.

One year on from the start of travel restrictions, technology deployment has accelerated across all parts of the sector, designed to foster increased confidence among travelers and help the industry to adapt. Amadeus continues to work in partnership with customers and partners to innovate and deploy technology that improves both the traveler experience and operational efficiency.

Notes to editor
*Statistic was obtained by combining 'Very willing' and 'Somewhat willing' responses
** Statistic was obtained by combining 'Much more likely' and 'Somewhat more likely' responses
*** Statistic was obtained by combining 'Strongly agree' and 'Somewhat agree' responses

For reference: Generation Z = 16–24 year olds; Millennials = 25–39 year olds; Generation X = 40–54 year olds;
Baby Boomers = 55–74 year olds; 75+ Silent Generation