



AMADEUS

Rebuild Travel Digital Health Survey Singapore

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 Singapore market.

Similar reports focused on the other eight countries plus a global report can be found [here](#).

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

- Over three-quarters (79%) of Singaporean travelers would be willing* to store their travel health data electronically if it enabled them to pass through the airport faster with fewer face-to-face interactions, while 76% would be willing* if it enabled them to travel to more destinations.
- Almost three-quarters (74%) would be willing* to store their travel health data electronically if it meant it enabled them to travel sooner.
- Half of travelers (50%) would be happy for a digital health passport to be used at all times when traveling, while only 4% would not be comfortable using a digital health passport for future travel under any circumstances.
- Baby Boomers would be happier to use a digital health passport at all times when traveling than Gen Z travelers (51% and 45% respectively would be happy to use a digital health passport at all times when traveling).
- Singaporean travelers are more confident in providing health data for travel purposes (72%) or booking and checking in at a hotel (55%) than for working in an office (37%) or visiting a restaurant or bar (26%).

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

- The main concerns Singaporean travelers have in relation to data storage are security risks with personal information being hacked (47%), privacy concerns around what health information needs to be shared (39%) and a lack of global standards and accountability around how personal data would be treated (37%).
- Security concerns are highest amongst Baby Boomers (62% of Baby Boomers said they had concerns about security risks with personal information being hacked, which decreases to 49% amongst Gen Z).
- Overall, only 20% of Singaporean travelers are concerned about keeping data current and up to date with the latest regulations (20%) and 20% are concerned about losing health data information before or while traveling.
- Skepticism around digital health passports is highest amongst Gen Z (6% of Gen Z said they would not be comfortable using a digital health passport under any circumstances, which decreases to 1% amongst Baby Boomers).
- There is also variation in the different kinds of travelers – business travelers (37%) are less concerned about the security risks associated with personal information being hacked than leisure travelers (51%).

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

- **Almost two-thirds of Singaporean travelers (65%) would be comfortable using a digital passport if it was accepted by most countries and was regulated by international standards**, while almost 3 in 5 (57%) would be comfortable if only COVID-19-specific data was included in any health passport.
- **Under two-thirds of respondents (63%) would be more likely** to store health data on an app where a travel company has partnered with a trusted healthcare company.**
- Baby Boomers would be more comfortable using a digital passport if it was accepted by most countries and was regulated by international standards (79%) when compared Gen Z (54%), who would be more comfortable if they were traveling with a trusted brand/travel company that they use regularly when compared to Baby Boomers (39% and 29% respectively).
- Almost 3 in 4 travelers (74%) agreed*** that they 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 they already use, while only 64% agreed*** that they would be open to downloading a new third-party app to store health data, irrespective on 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 of Singaporean travelers (51%), reassure them that all their information is in one place (51%) and would reduce stress around travel (49%).

Concerns remain around traveling in light of COVID-19

- **The biggest concern for Singaporean travelers is mixing with crowds in airports or at transport hubs (63%),** followed by trusting that an accommodation is adhering to necessary health and safety guidelines (61%). **Only 3% 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 leisure are more concerned (66%) about mixing with crowds at transport hubs when compared to business travelers (49%), but business travelers are more concerned (47%) about third parties adhering to necessary cleaning guidelines when compared to leisure travelers (37%).**

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

- **Contactless payments (52%), mobile apps to provide on-trip notifications and alerts (50%) and mobile boarding (49%) are the most 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 (48% vs 40% for respondents who are business travelers) and mobile boarding (47% vs 41% for respondents who are business travelers).
- Singaporean travelers would be most comfortable using biometric facial recognition technology at boarding gates (66%) and hotel check-ins (51%), but less at car rental pick-ups (23%) and conferences and events (29%).

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