

amADEUS

Rebuild Travel Survey

Spain

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.

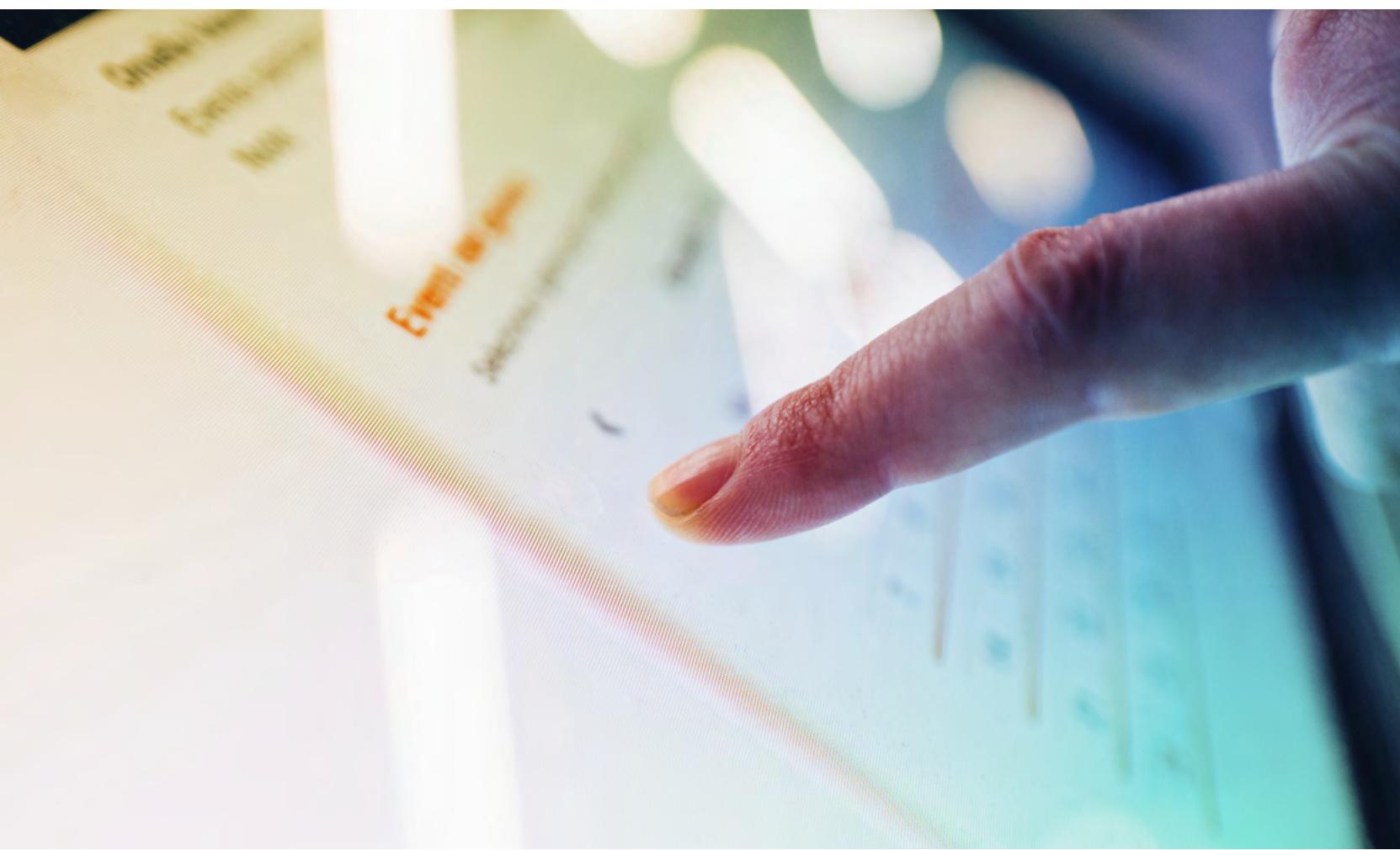
Similar reports focused on the other eight countries plus a global report can be found at amadeus.com/rebuildtravel

Appetite for travel in the next year is high but clear guidelines are necessary

- **Over three quarters (79%) of Spanish travelers are eager to travel and hope to do so in the next year, with 46% expecting to travel for business to a destination requiring a flight later this year**
- **Europe is the top destination for both Spanish business and leisure travelers (46% and 64%) with over a third (34%) expecting to take two trips in the next year**
- Almost a third (31%) of travelers agree that the current international restrictions and guidelines on travel are confusing and unclear, making them less likely to book travel

Travelers are willing to share health data to get traveling again

- **95% of Spanish travelers would be willing to provide personal information and health data for the effective use of digital health passports**
- Spanish travelers are most comfortable providing digital health data for international travel (78%) compared to domestic travel (46%)
- 46% of Spanish business travelers would be willing to share their digital health data to visit an office or business event/conference
- 39% of leisure travelers would be willing to share their digital health data for an excursion or activity at destination

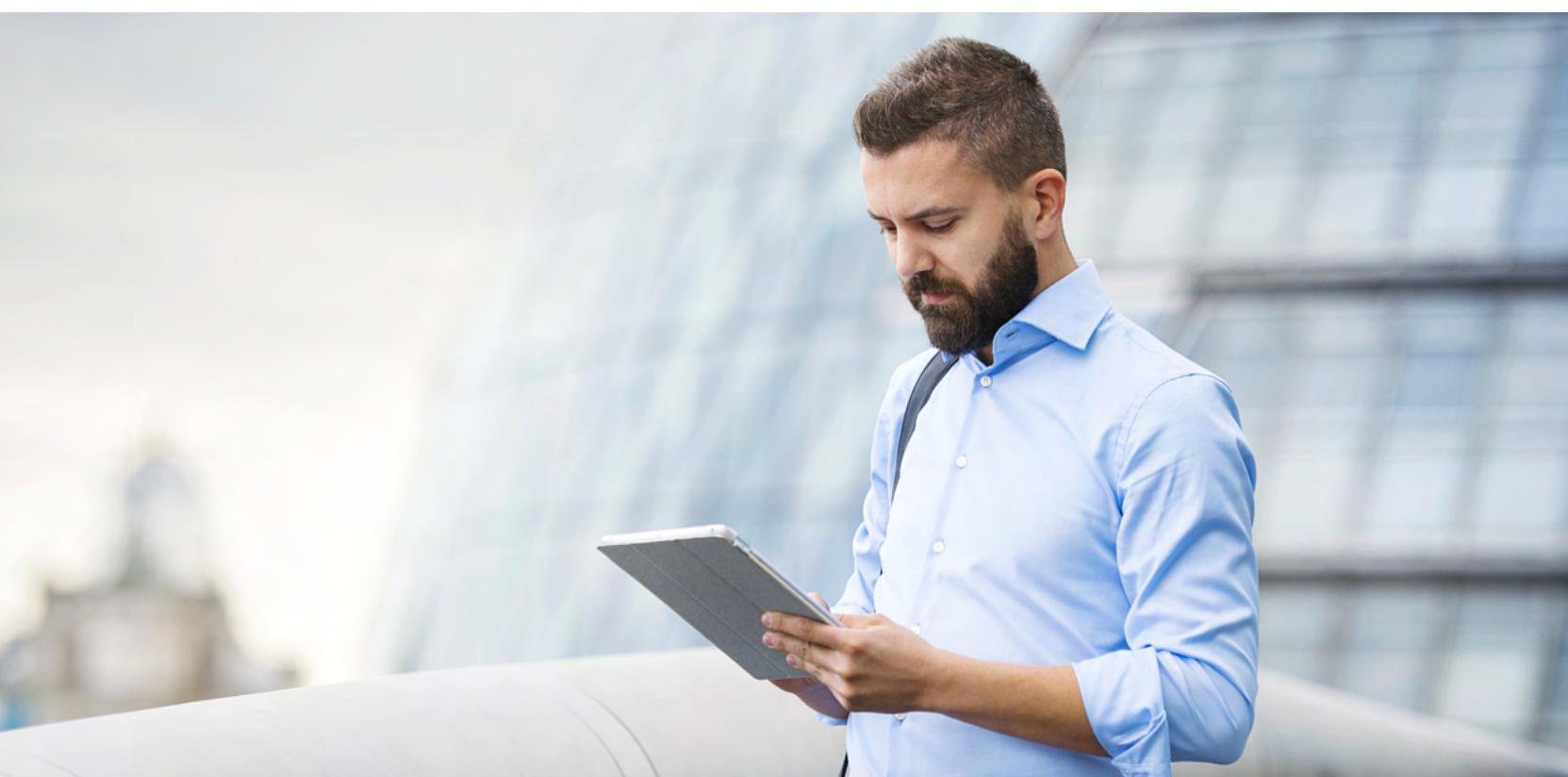


Concerns remain around traveling in light of COVID-19

- **The biggest concern for Spanish travelers is self-isolation/quarantine before and after travel (49%)** followed by fears of catching COVID-19 while traveling (42%) and changing restrictions resulting in last minute cancellations and without a refund on bookings already made (36% respectively). **Only 3% of respondents 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 self-isolation before and after travel (44%) but more concerned about increased queues while traveling (24%)
- Leisure travelers are generally more concerned about changing restrictions without a refund on bookings already made (38%) and resulting in last minute cancellations (39%)

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

- **Automated and flexible cancellation policies (51%), mobile boarding (48%) and mobile apps that provide on-trip notifications and alerts (46%) are the most popular technologies that Spanish respondents noted would increase their confidence to travel in the next 12 months**
- Respondents who are leisure travelers were more likely to prefer automated and flexible cancellation policies (44% vs 58% for respondents who are business travelers)
- Business travelers are more likely to prefer self-service check-in (36% vs 33% leisure) and different methods of payments (35% vs 28% for leisure)
- Leisure travelers are more likely to prefer an app to store digital health data on their devices (46% vs 39% for business)



For the future of travel, sustainability is high priority for travelers

- Over half of Spanish travelers (51%) believe greater availability to green modes of transports such as electric planes and trains would help the travel industry to become more sustainable long term
- Making sustainable travel more cost-competitive (49%) and solar or wind-powered technologies (45%) are also top ways to help the industry
- 38% of business travelers would see transparency around travel companies' sustainability policies as an option, and over a third (34%) for public reporting on the impact of sustainability initiatives
- When it comes to different generations, opportunities for travelers to be involved in the preservation of tourist destinations is a stronger option for younger travelers (74% Gen Z & Millennials) compared to older travelers (55% Generation X & Boomers)

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