aMaDEUS

Rebuild Travel Survey

United Kingdom

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 traveller and how to get the world traveling safely again. Over the last 12 months, Amadeus commissioned three global traveller surveys to understand traveller sentiment during this unique time. This latest traveller 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 travelled abroad in the last 18 months, with 1,000 respondents per market. The survey aims to understand traveller sentiment to safe travel in light of COVID-19 as restrictions begin to ease in some areas around the world.
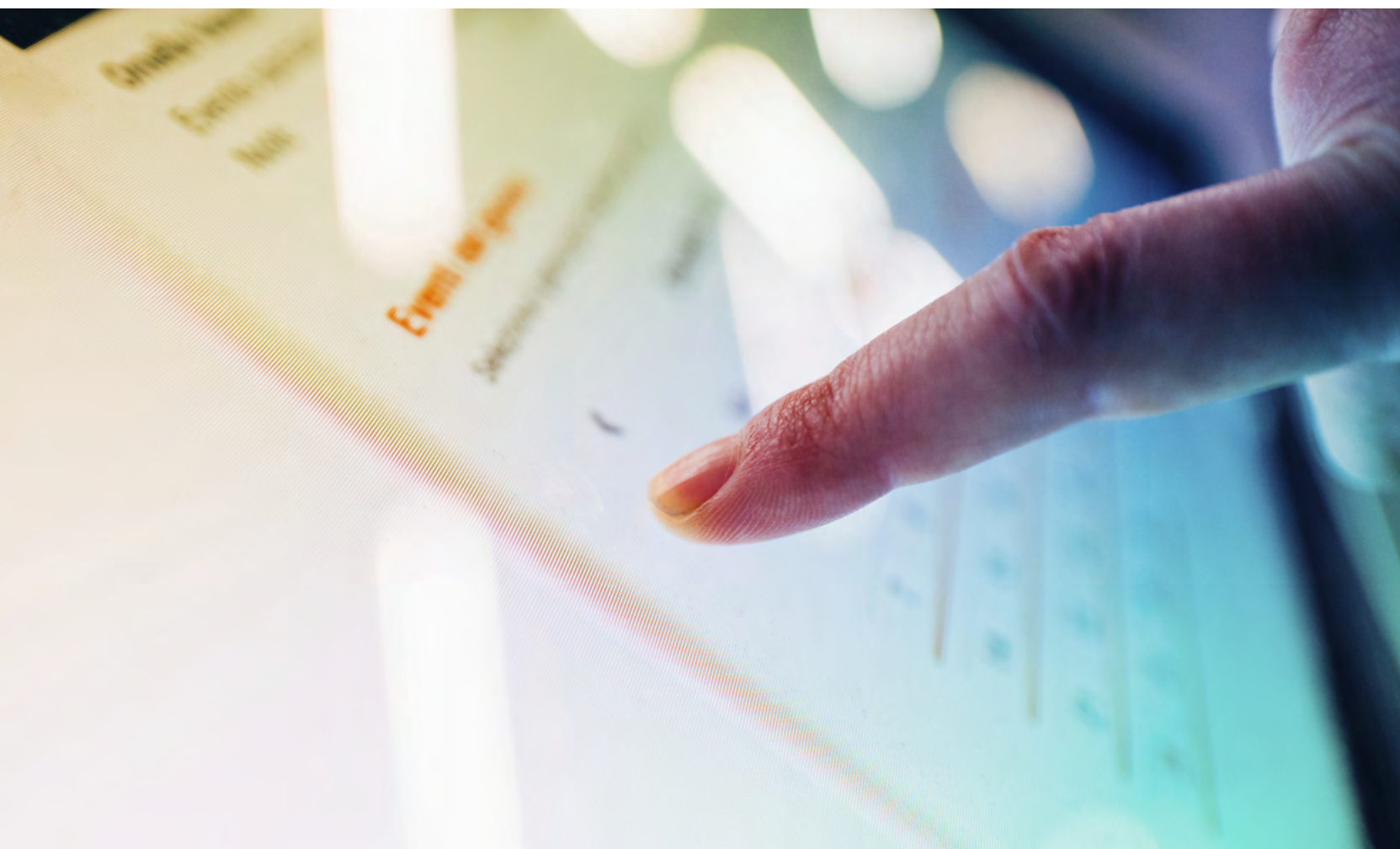
Similar reports focused on the other eight countries plus a global report can be found at amadeus.com/rebuildtravel

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

- **69% of UK travellers are eager to travel and hope to do so in the next year, with 44% expecting to travel for business to a destination requiring a flight later this year**

- **Europe is the top destination for both business and leisure travellers (40% and 56%) with over a third (34%) expecting to take two trips in the next year**

- 45% of travellers 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

- **96% of UK travellers would be willing to provide personal information and health data for the effective use of digital health passports**

- UK travellers are most comfortable providing digital health data for international travel (58%) compared to domestic travel (38%)

- 41% of UK business travellers would be willing to share their digital health data to visit an office or business event/conference

- 30% of leisure travellers would be willing to share their digital health data for an excursion or activity at destination
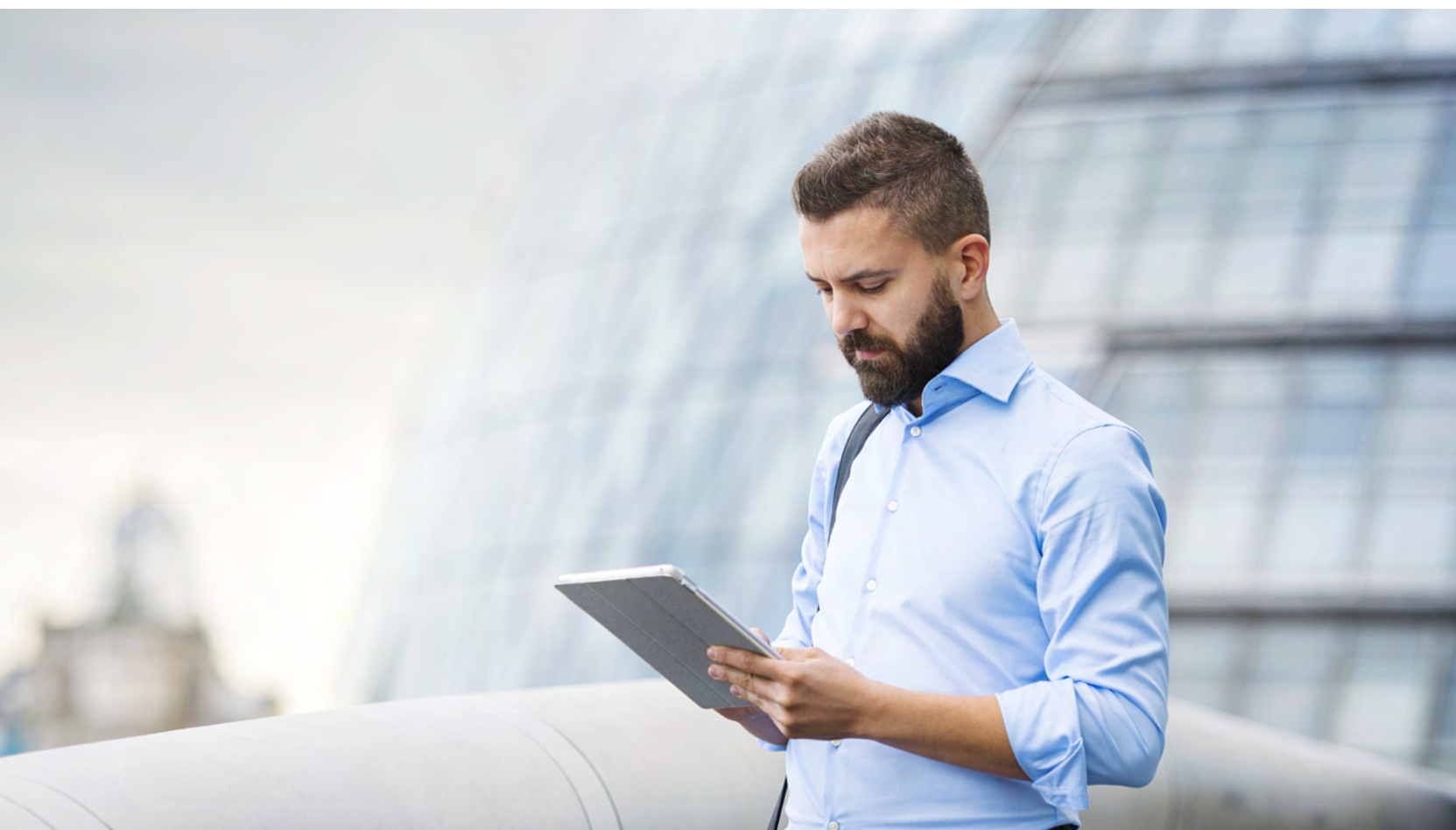
Concerns remain around traveling in light of COVID-19

- **The biggest concern for UK travellers is the cost of testing before and after travel (37%)** followed by self-isolation before and after travel (36%) the risk of catching COVID-19 while traveling and changing restrictions resulting in last minute cancellations (34%). **Only 3% of respondents don't have any concerns about traveling in light of COVID-19**

- Different kinds of travellers are concerned about different things – people who travel for business are less likely to be concerned about cost of testing before and after travel (28% vs 46% leisure)

- Leisure travellers are less concerned about increased queues while traveling due to additional document checks (20% vs 27% for business)

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

- **Self-service check in (40%), automated and flexible cancellation policies (35%) and mobile boarding (34%) are the most popular technologies that UK respondents noted would increase their confidence to travel in the next 12 months**

- Leisure travellers were more likely to prefer self-service check in (45% vs 35% for business travellers) and automated and flexible cancellation policies (41% vs 30% for business travellers)

- 29% of business travellers would like to see self-scanning luggage technology to increase their confidence to travel

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

- **43% of UK travellers believe greater availability or accessibility to green modes of transport e.g., electric planes or trains would help the travel industry to become more sustainable long term**

- Making sustainable travel more cost-competitive (39%) and solar or wind-powered technologies (36%) are also top ways to help the industry

- Public reporting on the impact of sustainability initiatives is a stronger option for business travellers to help the industry (31% vs 23% for leisure)

- When it comes to different generations, making sustainable travel more cost-competitive is a more appealing option for older travellers (95% Gen X & Boomers) compared to younger travellers (74% Gen Z & Millennials)

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 traveller 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 traveller sentiment towards sustainable travel, too. Conversations on sustainable travel have been accelerated by the pandemic and Amadeus is committed to supporting travellers and our customers to help make sustainable travel a reality and understanding traveller sentiment towards different solutions.

Sentiment towards digital health data varies globally, but digital health verification will be increasingly important to help increase traveller 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, travellers 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 traveller identification and document validation across the traveller 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 traveller experience.

Amadeus continues to work in partnership with customers and partners to innovate and deploy technology that improves both the traveller experience and operational efficiency.