



amadeus

Rebuild Travel Survey

United States of America

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 once more. 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 to travel as well as concerns, sentiment towards travel health data, openness to technology and sustainable travel.

Censuswide surveyed respondents between September 2nd-14th, 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 traveler sentiment to safe travel in light of COVID-19 as restrictions begin to ease in some areas around the world. Below are some of the key insights for the US market.

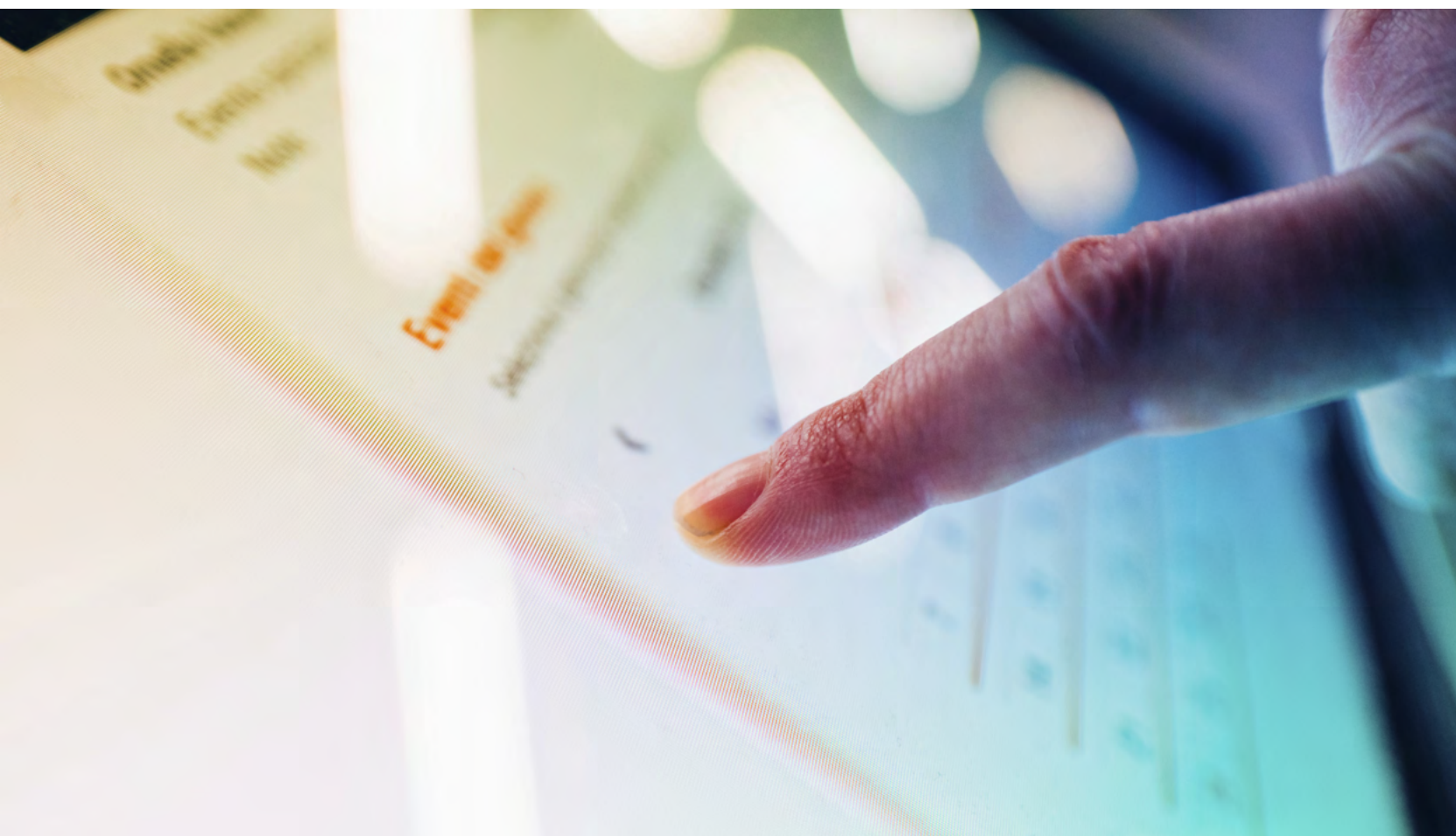
Similar reports focused on the other eight countries plus a global report can be found at amadeus.com/rebuildtravel

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

- **73% of US travelers are eager to travel and hope to do so in the next year, with 48% expecting to travel for business to a destination requiring a flight later this year**
- **North America is the top destination for both business and leisure travelers (39% and 53% respectively) with almost a quarter (24%) expecting to take two trips in the next year**
- Just over a third (34%) of travelers agree that the current international restrictions and guidelines on travel are confusing and unclear, making them less likely to book travel. Almost a third (32%) of business travelers report that they will not be doing any international travel due to unclear restrictions and guidelines, compared to just under a quarter (24%) of leisure travelers

Travelers are willing to share health data to get traveling again

- **Over 9 in 10 (91%) US travelers would be willing to provide personal information and health data for the effective use of digital health passports**
- US travelers are most comfortable providing digital health data for international travel (58%) compared to domestic travel (47%)
- 44% of US business travelers would be willing to share their digital health data to visit an office or business event/conference
- 37% of leisure travelers would be willing to share their digital health data for an excursion or activity at destination

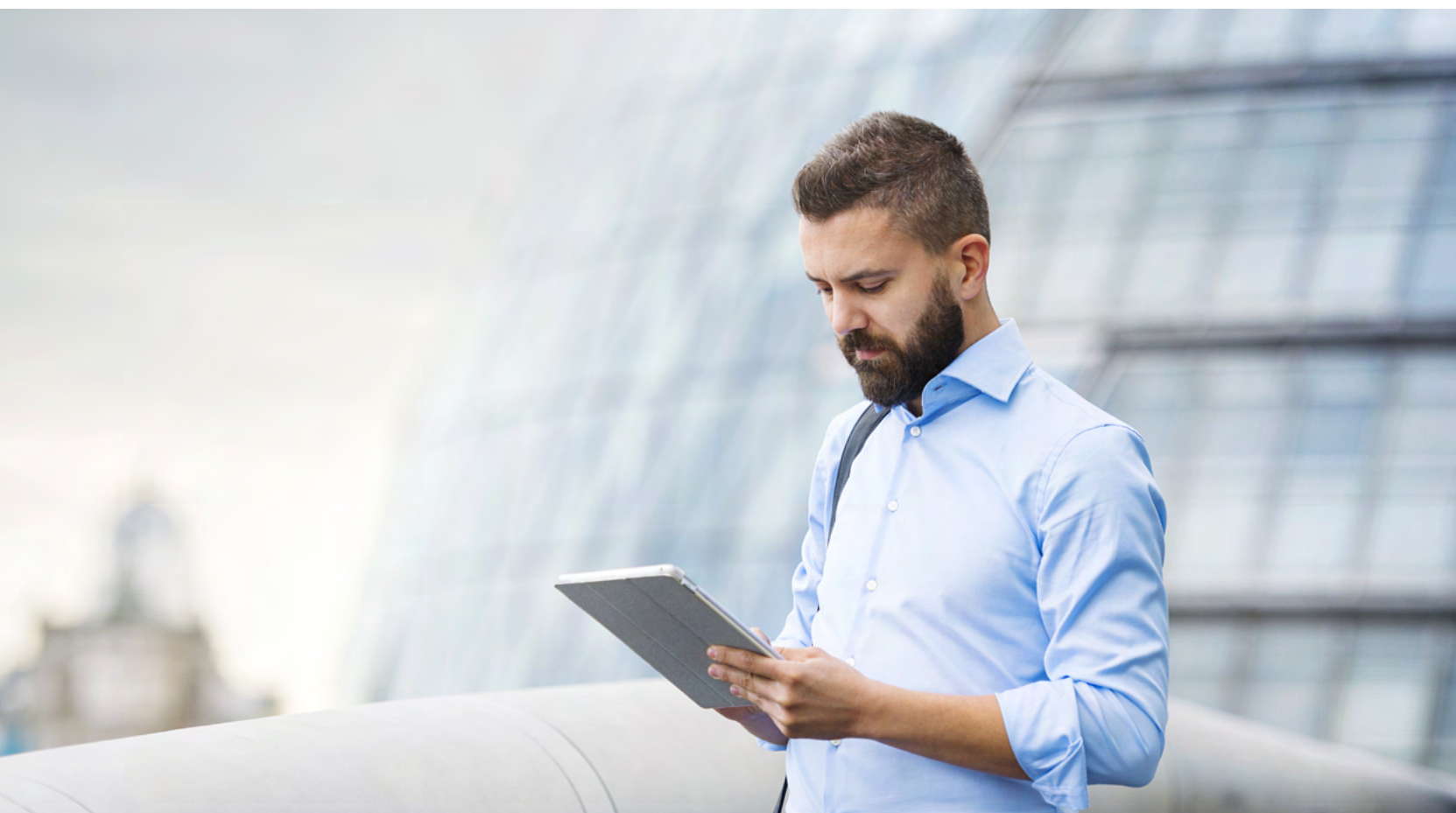


Concerns remain around traveling in light of COVID-19

- **The biggest concern for US travelers is the risk of catching COVID-19 while traveling (43%),** followed by changing restrictions resulting in last minute cancellations (36%) and changing restrictions without a refund on bookings already made (35%). **Only 6% 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 more concerned about increased queues while traveling due to additional document checks (29% vs 19% of leisure travelers), but less concerned changing restrictions resulting in last minute cancellations (32% vs 40%)

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

- **Self-service check in (43%), mobile applications that provide on-trip notifications and alerts (39%) and automated and flexible cancellation policies (39%) are the most popular technologies that US respondents noted would increase their confidence to travel in the next 12 months**
- Leisure travelers were more likely to prefer automated and flexible cancellation policies (46% vs 31% for business travelers), and self-service check in (49% for leisure vs 38% for business travelers)
- A third (33%) of business travelers would like to see facial recognition technology to increase their confidence to travel



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

- **39% of US travelers 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 (38%) and transparency around travel companies' sustainability policies (38%) are also top ways to help the industry
- Opportunities for travelers to be involved in the preservation of tourist destinations is a stronger option for business travelers to help the industry (42% vs 31% for leisure)
- When it comes to different generations, making sustainable travel more cost-competitive is a more appealing option Generation X and Baby Boomers (46%) compared to Gen Z and Millennials (33%).

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 in the long-term.

When it comes to the concerns around traveling in light of COVID-19 we have seen a shift in the past year towards anxiety around last minute cancellations, refunds and an increasing 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 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, IBM Digital Health Pass and ICC AOKpass, to accelerate global adoption, which is critical to unlock international travel in the coming months.

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