amadeus

Rethink Travel Global Survey
France insights

2020

Introduction

As of 20th October 2020, government statistics show France has recorded 1,282,769 confirmed cases resulting in 36,020 deaths attributed to COVID-19. The impact to the country has been devastating, resulting in thousands of job losses, many of those jobs in travel, tourism and hospitality.

Censuswide surveyed 6,074 respondents who've traveled abroad in the last 18 months in France, Germany, India, Singapore, UK and US between 14.09.2020 - 22.09.2020.

CENSUSWIDE
THE SURVEY CONSULTANTS

The following is a summary of findings in France. Similar reports focused on the other five countries plus a global report can be found at **amadeus.com/rethinktravel**

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

France insights

The biggest concerns about traveling in light of COVID-19

The biggest concerns for French travelers are the fear of being stranded in their destination if travel options are cancelled or changed (42%), and Government imposed quarantine at destination or upon return home (42%), followed by reduced enjoyment of their travel experience due to restrictions at destination (34%). Only 10% of people were concerned about access to information on which destinations are safe to travel to.

42% Fear of being stranded

42% Government-imposed quarantines at either end of the journey

34% Reduced enjoyment due to restrictions

10% Concerned about access to information about where is safe to travel to

But different kinds of travelers are concerned about different things – respondents who are long-haul flight passengers were less likely than respondents who are short-haul flight passengers to be concerned about the inability to enforce social distancing on planes (20%

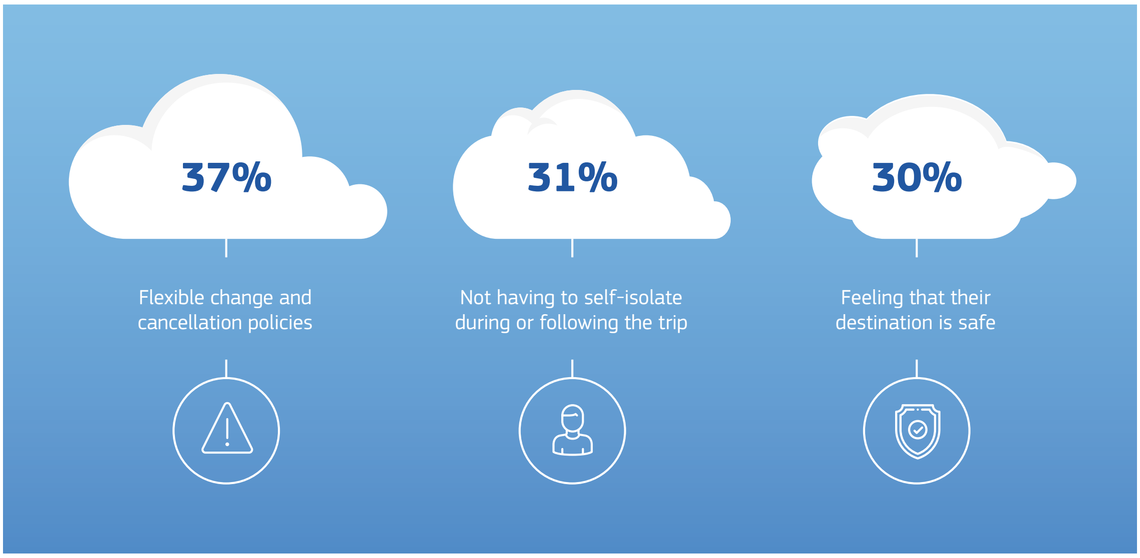
vs 25%), but slightly more likely to be concerned with safety and cleanliness on public transport in general (21% vs 19%).

People who only travel for business are **less likely to be concerned about reduced enjoyment of the travel experience due to restrictions at destination** (19% vs 37% for leisure only travelers), but are **more likely to have concerns over access to information on which destinations are safe to travel to** (1415% vs 8% for leisure only travelers).

Different age groups also have different concerns: people aged 55-74 were the most likely to express concern around Government imposed quarantine at destination or upon return home (60%) or fears of being stranded in the destination if travel options are cancelled or changed (54%), and people aged 16-24 were the least likely to be worried about those issues (33% and 36% respectively).

The conditions that would make French respondents feel comfortable traveling

The biggest thing that French travelers noted as needing to be fulfiled for them to feel comfortable traveling is **flexible change/cancellation policies and payment terms to avoid penalties/ losing money,** which was selected by 37% of respondents, followed by not having to self-isolate at destination or on return home (31%) and feeling that their destination is safe (30%).



Flexible change/cancellation policies and payment terms to avoid penalties/losing money were of less importance to respondents who are business passengers (23%), who were **slightly more likely to be comforted by frequent communication from travel brands about the status of their trip in advance of travel (24%).**

Overall 23% identified technology that reduces human contact, queues and physical touchpoints as a source of comfort when traveling, with preference for this being highest among respondents who are Boomers.

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

Automated cleaning processes (36%), contactless payments (34%) and mobile apps to provide on-trip notifications and alerts (33%) were the most popular technologies that respondents noted would increase their confidence to travel in the next 12 months.

Respondents **who have traveled on a long-haul flight in the past 18 months were slightly more likely to say that mobile apps that provide on-trip notifications and alerts would increase their confidence to travel** in the next 12 months than respondents who have traveled on a short-haul flight in the past 18 months (36% vs 35%), while the most popular technology for respondents who have traveled on a short-haul flight in the past 18 months was automated cleaning processes. **Business travelers were drawn to contactless payments over other choices.**

Age plays some part in preferences here - while only 34% of the 16-24 group would have their confidence to travel in the next 12 months increased by automated cleaning processes, that rises to 40% for the 55-74 group. Conversely, 31% of the 16-24 group said mobile boarding would help to increase their confidence to travel in the next 12 months versus only 21% of the 55-74 group.

The technology experiences that would address French travelers' biggest concerns about traveling in light of COVID-19 and make them more likely to travel

91% of French travelers[1] who have any biggest concerns about traveling in light of COVID-19 responded that at least one of the suggested technologies could address their concerns and would make them more likely to travel. Availability of full information at point of search, booking and just before travel was the most commonly selected technology experience that would address concerns and encourage respondents to travel (33%), followed by a universal digital traveler identification stored on your mobile phone that enables one identity check during your entire trip (32%) and mobile apps with information about the destination city's safety measures and requirements (31%).

Availability of full information at point of search, booking and just before travel was most important among Boomers (42%, compared to 29% for the 16-24 group), while the universal digital ID identification stored on your mobile phone was more popular with respondents who are short-haul travelers (36%) than with respondents who are long-haul travelers (30%).

[1] Inverse of respondents who selected 'None of the above' when answering 'Considering your biggest concerns about traveling in light of COVID-19, which of the following technology experiences would make you more likely to travel?' (9%)

What French travelers would most like technology to do for them when thinking about travel

Overall, the three biggest things that French travelers most wanted technology to do when thinking about travel were for it to:

- Reduce queues and congestion in public spaces (37%)
- Notify in advance when there is a delay (29%)
- Protect my financial data and personal information (29%)

Respondents who are long-haul travelers were less likely to want technology to minimize their face-to-face or physical contact with others when thinking about travel than those respondents taking short-haul flights (21% vs 29%). **The most popular choice (23%) for respondents who are business travelers when thinking about travel was make booking travel easier, more intuitive and tailored to their needs.**

Age was a factor here - older generations were much **more likely to be interested in tech reducing queues and congestion in public spaces** (51% for Boomers vs 27% for Generation Z) and **minimizing face to face or physical contact with others** (37% for Boomers vs 17% for Generation Z) when thinking about travel.

Travelers' hopes and expectations for the future of travel

A majority (64%) expect that they won't have to make fewer trips due to government travel restrictions in the next 12 months[2]. This actually increases when looking at personal confidence - 73% expect that they won't have to make fewer trips because of their own worries about COVID-19, though this decreases with age (it's only 61% for Boomers)[3].

While overall only 22% of respondents agreed that they would like to see a clear way to identify sustainable travel options and a mechanism to reduce carbon emissions in travel, this rose to **29% for Generation Z and to 30% for respondents who regularly travel for both business and leisure.**

Regional variations

- Respondents from the Paris region were the most likely to say that there was at least one technology which make them feel better about traveling **(95%)** - those from the Centre region were the least likely **(87%).**
- People from Lille are particularly concerned about being stranded in the destination due to travel cancellations/changes - **52%** listed it compared to **42%** nationwide.
- Marseille had the highest number of respondents reporting that they wanted technology to help them to reduce their environmental impact of travel **(24%).**

[2] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to government travel restrictions' (36%)
[3] Inverse of respondents who selected 'I expect to make fewer trips over the next 12 months, due to my lack of confidence about the safety of travel in light of COVID-19' (27%)

Conclusion

The survey demonstrates that there is a continued appetite for travel, however, it is clear that travelers are looking for their concerns to be addressed. The positive news for the industry is that many of these concerns and preferences can be addressed with technology that is available today, whether it is to provide better access to information, ensure social distancing, reduce physical content or more.

As the industry has faced the challenges of COVID-19, we have seen the acceleration of technology development and adoption, all designed to foster increase confidence among travelers and help the industry to adapt to the changed environment. It is evident from this survey that technology will play a key role in encouraging demand as people start to travel once more. In the same way we have seen across workplaces, retail environments and in entertainment, technology offers huge potential to rethink how we experience the world.

At Amadeus, we work with our customers across all areas of travel, deploying technology that improves both the traveler experience and operational efficiency.

For our airline customers, we provide departure control solutions that ensure social distancing, dispersed seating on airplanes and the capacity to automatically rebook should a journey be disrupted. At airports, we are deploying biometric and self-service solutions to help reduce physical contact and speed the flow of passengers through an airport in a way that instils confidence. For hotels, we deliver solutions to help manage strict cleaning schedules, enabling compliance with the latest protocols and standards.

As touchless experiences become key to unlocking travel, we are delivering for our customers, whether it is through contactless payments, remote and self-service bag drop solutions or mobile or voice activated kiosks. Additionally, through our focus on innovation we offer a wide range of customer service solutions from AI-powered chatbots that can answer critical questions about travel policies and a travel alerts notifier that delivers key information via SMS or email, key to keeping travelers informed throughout their journeys.

At the core of our approach is a commitment to working in partnership with our customers. Our teams are working with customers each day to create the solutions that will not only help them address the immediate challenges of today, but equip them for the renewal and recovery we want to see.