aMaDEUS

Rethink Travel
Global Survey
India insights

2020

Introduction

By the end of October 2020, India surpassed 8 million confirmed cases and 120,000 deaths caused by COVID-19. The impact to the country has been devastating, resulting in millions of job losses, many of those jobs in travel, tourism and hospitality.

Given its role in the travel community as a global provider of technology to the travel industry, and knowing it requires a community response to get the world traveling again, Amadeus has been engaging with its customers and industry partners to rethink travel. This survey is part of the company's commitment to understand how to reignite traveler confidence, ultimately ensuring travel continues to be a key driver of global progress, positivity and prosperity.

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

Below are some of the key insights for the Indian market[1]. Similar reports focused on the other five countries plus a global report can be found at **amadeus.com/rethinktravel**

[1] 1,005 respondents who've traveled abroad in the last 18 months in India
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

India insights

The biggest concerns about traveling in light of COVID-19

The predominant concern for Indian travelers[2] (39%), was the increased risk of catching or transmitting the virus. Indian respondents also cited the safety and cleanliness of public transport (37%) and Government-imposed quarantine at either end of the journey (35%) as one of their biggest concerns about traveling in light of COVID-19.

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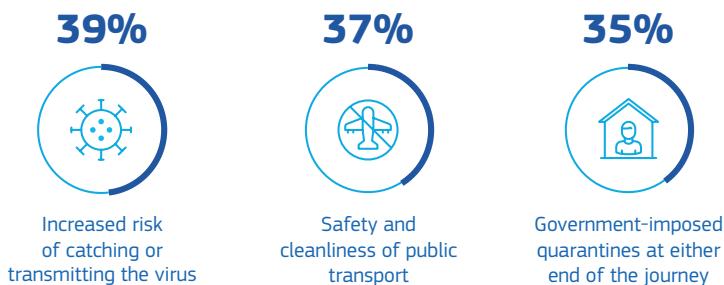
Meanwhile, respondents who have traveled only for **business in the past 18 months were less concerned about the increased risk of catching and transmitting the virus (26%) compared to those who have traveled just for leisure in the past 18 months (43%).**

[2] Travelers refers to Indian respondents who have traveled abroad in the last 18 months

However, concerns over losing money due to trip cancellations ranked similarly between the two groups – (16%) and (17%) respectively.

More respondents who have traveled on a long-haul flight in the past 18 months noted that being stranded in the destination if travel options are cancelled or changed was one of their biggest concerns about traveling in relation to COVID (31%), in comparison to those who have traveled on a short haul flight over the past 18 months (27%) . Similarly, more respondents who have been on a long-haul flight in the last 18 months noted that the Government imposing a quarantine at their destination or upon return home was one of their biggest concerns (39%) compared to short haul flyers (34%).

The conditions that would make respondents feel comfortable traveling

Access to technology that reduces human contact, queues and physical touchpoints was the ultimate factor that would need to be fulfiled for Indian respondents to feel comfortable traveling (40%).

40%	40%	39%
Access to technology that reduces human contact	Limiting passenger numbers	Effective track & trace systems
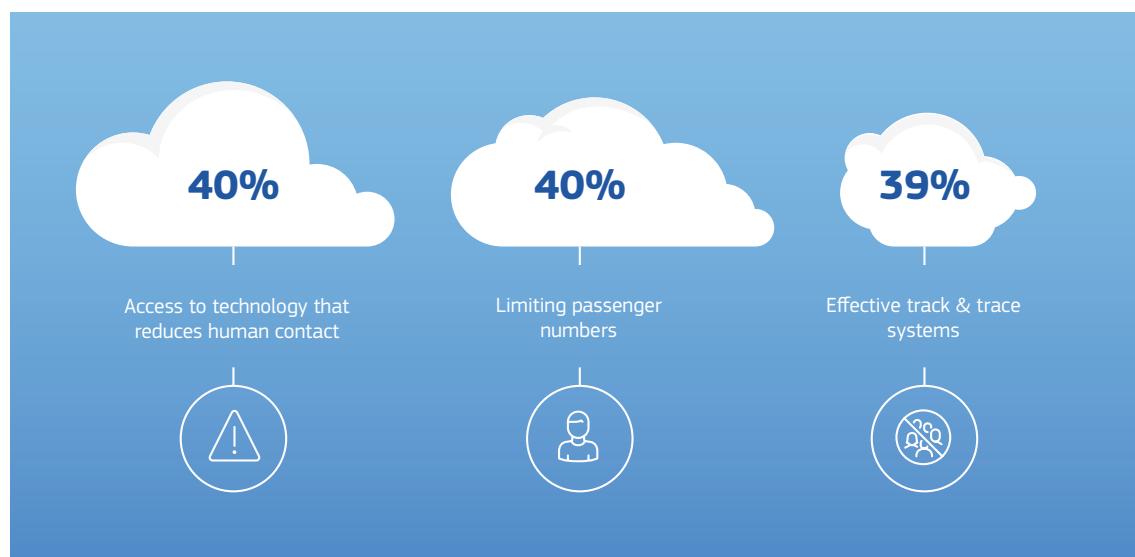
This was followed by the need for effective test, track and trace programs to be in place to contain infections (40%); visibility to and assurance of sanitization, hygiene and safety measures in hotels and accommodations (39%) and limiting the number of passengers on planes to reduce contact (38%).

Looking at flexible change and cancellation policies and payment terms to avoid penalty or losing money, **business and leisure travelers had similar sentiments.** 3 in 10 (30%) of Indian travelers who have just traveled for business in the past 18 months noted that this condition would need to be fulfiled for them to feel comfortable traveling and a third (33%) of those who have only traveled for leisure in the past 18 months noted that this condition would need to be fulfiled. It's interesting to note that only 23% of Generation Z said this would make them feel comfortable to travel.

The technologies that would increase confidence in travel amongst Indian respondents in the next 12 months

Mobile applications that provide on-trip notifications and alerts, emerged as the most appealing technology for Indian travelers that would increase their confidence to travel in the next 12 months (56%). This was followed by the need for contactless payments (54%) and mobile boarding which offers the ability to have airline boarding passes on their phones (51%).

For Millennial and Generation X respondents, automated cleaning processes ranked similarly in technologies that would increase their confidence to travel in the next 12 months (49% vs 52% respectively).

Meanwhile, passengers who have traveled on a **long-haul flight in the past 18 months were more likely to require mobile boarding than those who have traveled on a short-haul flight in the past 18 months** (62% vs 53% respectively). While 50% of respondents who have just traveled for leisure in the past 18 months noted that contactless payments would increase their confidence to travel in the next 12 months, compared to 47% of respondents who have just traveled for business.

What Indian travelers would most like technology to do for them

34% of those surveyed would like to see tech that would minimize face-to-face or physical contact with others. Indian travelers also favoured technologies that would reduce queues and congestion in public places (32%), protect financial data and personal information (32%) and reduce the requirement of physical documents (31%).

Technologies that ensure the accuracy and effectiveness of national test, track and trace programs were most important to Generation X (40%), Millennials (33%), and Generation Z (21%).

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

Half of the Indian respondents who have any biggest concerns about traveling, in light of COVID selected contactless payment experiences at the airport, in-flight and accommodations, as well as the availability of full information at the point of search, booking and just before traveling (50% each) as tech experience that would make them more likely to travel.

These were followed by the need for **mobile applications informing travelers of a destination's safety measures and requirements,** and access to technology enabling check-in, pass-through security and boarding without the need for physical checks (47% each).

Travelers' hopes and expectations for the future of travel

Of all Indian respondents, 43% agreed that they expect to make fewer trips over the next 12 months due to lack of confidence about the safety in light of Covid-19. Meanwhile, 37% agreed they expect to make fewer trips over the next 12 months due to Government travel restrictions, with 31% citing that they expect to make few trips over the next 12 months due to the increasing pressure on household finances.

Regional perspectives

- In South India, **43%** of respondents said the increased risk of catching or transmitting the virus was one of their biggest concerns, compared with **29%** of respondents in the northeast of the country.
- **35%** of those in West India said the ability to wear a mask comfortably throughout the journey was a condition that would need to be fulfiled for them to feel comfortable traveling whilst only **23%** of respondents in Northeast India feel the same way.
- **63%** of respondents in West India said contactless payments would increase their confidence to travel in the next 12 months, compared with **45%** in East India.
- **30%** of travelers in North India said they would most like to see technology that will help them to reduce the environmental impact of travel, compared to **24%** of respondents who cited it in South India
- **42%** of those in the south of the country who have any biggest concerns about traveling, in light of COVID said a mobile-optimised universal digital travel identification that enables one identity check during their trip would make them more likely to travel, compared to **33%** of respondents who cited it in Northeast India
- **47%** of respondents in East India expected to make fewer trips over the next 12 months due to lack of confidence regarding safety of travel in light of Covid-19 compared with **38%** in West India.

Conclusion

The survey demonstrates that there is a continued appetite for travel, however, it is evident 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 faces 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.