



AMADEUS

Rethink Travel Global Survey Singapore insights

2020

Introduction

The impact of COVID-19 to the country has been devastating, resulting in multiple job losses, with many of those jobs in F&B, 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 the France, Germany, India, Singapore, UK and US between 14.09.2020 - 22.09.2020. Below are some of the key insights for the Singapore market¹.

CENSUSWIDE
+
THE SURVEY CONSULTANTS

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

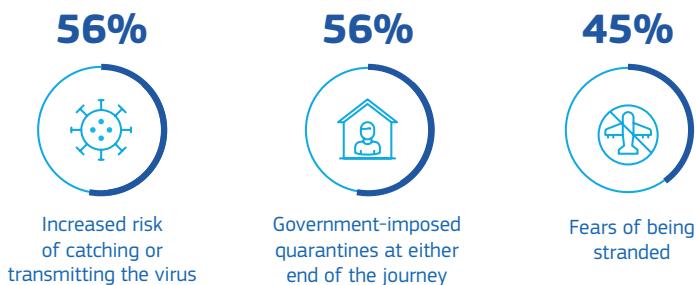
¹ 1,000 respondents who've traveled abroad in the last 18 months in Singapore
For reference: Generation Z = 16-24 year olds; Millennials = 25-39 year olds; Generation X = 40-54 year olds; Boomers = 55-74 year olds; 75+ Silent Generation

Singapore insights



Travelers' Concerns

Increased risk of catching or transmitting the virus is the biggest concern about traveling, in light of COVID-19 for over half of Singapore travelers² (56%), followed by Government imposed quarantine at the destination or upon return home (54%), and fears of being stranded in the destination if travel plans are changed or cancelled (45%)



The concerns do vary across travelers' age and depending on the type of travel that respondents have made over the last 18 months. The increased risk of catching or transmitting the virus is the highest concern for Gen Z (62%) and Millennials (54%),

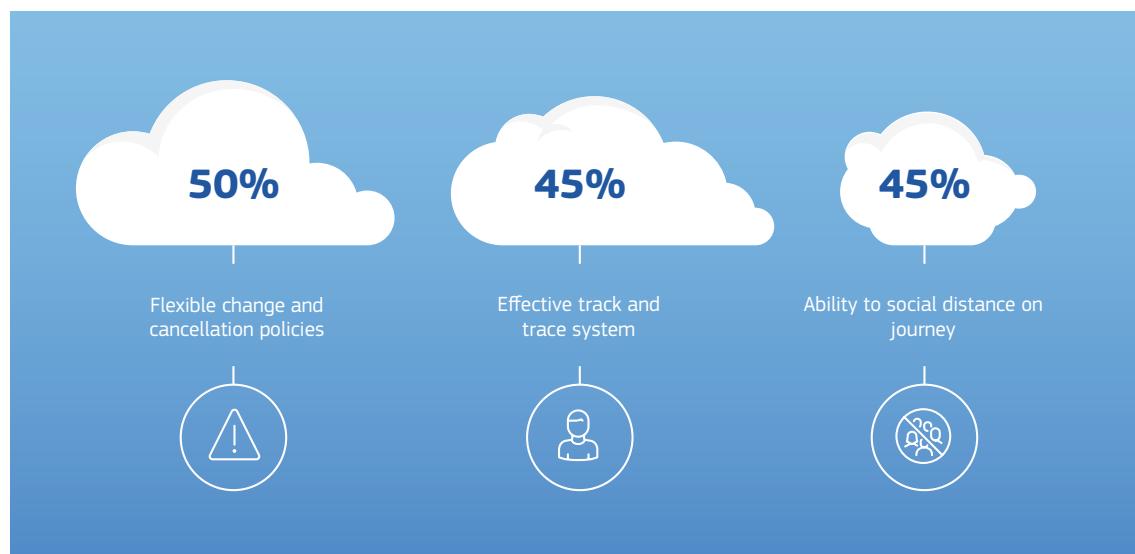
²Travelers refers to Singapore respondents who have traveled abroad in the last 18 months

however Government imposed quarantine at destination or upon return home ranks as the biggest concern for both Gen X (60%) and Boomers (69%). months (43%).

For under half (47%) of respondents in Singapore who have traveled just for business in the last 18 months, Government imposed quarantine at destination or upon return home is one of their biggest concerns about traveling in relation to COVID, while increased risk of the virus is one of the biggest concerns for almost 3 in 5 (58%) of those who have traveled just for leisure in the past 18 months. Money is also seemingly a bigger concern for leisure travelers, with just under 3 in 10 (29%) leisure travelers noting that one of their biggest concerns is losing money if trips are cancelled compared to just 9% of business travelers.

The conditions needed to help travelers feel comfortable traveling

Concerns over losing money is high for Singapore travelers, as the conditions that would most need to be fulfilled for them to feel comfortable traveling (50%) would be flexible change and cancellation policies and payment terms to avoid penalty or losing money. **An effective test, track and trace program to contain infections is also a high priority for Singapore travelers, as almost half (45%) of respondents noted that this condition would need to be fulfilled for them to feel comfortable traveling.**



The ability to distance and limit number of people is a priority, with **45% wanting to be able to socially or physically distance throughout journey, and with 44% wanting to limit the number of passengers on a plane to reduce contact**. When it comes to the type of journey, limiting the number of passengers on a plane to reduce contact is slightly more important for travelers who have been on a short-haul flight in the last 18 months (47%) compared to those that have been on a long-haul flight over the same period of time (45%).

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

Mobile applications to provide **on trip-notifications and alerts is seemingly the most appealing technology for Singapore travelers** as 57% noted it as a technology that **would increase their confidence to travel in the next 12 months**; followed by a contactless payments experience (54%) and mobile boarding and self-service check in (both 48%).

When it comes to age, **Boomers in Singapore appear slightly more receptive to contactless technology compared to younger generations**. Over half (55%) of Boomers noted facial recognition technology would increase their confidence to travel in the next 12 months compared to 40% of Gen Z respondents and 43% of Millennials. 57% of Boomers identified payments as a technology that would increase their confidence to travel in the next 12 months, compared to 49% of Gen Z and 55% of Millennials.

Mobile technology is important for business travelers, **with almost half of respondents who have traveled only for business in the last 18 months interested in mobile applications to provide on-trip notifications and alerts as well as mobile boarding (47% each)**. Mobile applications are also important for respondents who have just traveled for leisure over the last 18 months, with 55% noting it would increase their confidence to travel in the next year, closely followed by contactless payments (53%).

What travelers would most like technology to do for them

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

- Reduce queues and congestion in public spaces (45%)
- Ensure the accuracy and effectiveness of national test, track and trace programs (39%)
- Protect financial data and personal information (37%)

Reducing need for physical documents was noted by 38% of respondents who have only traveled for business over the last 18 months as one of the main things that they would most like technology to do when thinking about travel. 47% of travelers who have only traveled for leisure over the past 18 months identified reduction in queues and congestion in public spaces as one of the main things that they would most like technology to do when thinking about travel, closely followed by protection of their financial data and personal information (40%).

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

Availability of full information at point of search, booking and just before travel was the most selected (56%) option amongst those who have any biggest concerns about traveling in light of COVID-19, as the technology experience that would make respondents more likely to travel, followed by a contactless experience at hotels (52%) and contactless payment experience at hotels, includes mobile check-in and check-out, keyless entry and voice activated room service (52%). Remote baggage check-in away from the airport was the least likely technology to encourage travelers (23%).

Contactless experiences are the most likely technology that would make respondents who have just traveled for business over the past 18 months more likely to travel with over half (53%) selecting a contactless experience at hotels, followed by 40% for contactless payments experiences at the airport, in-flight, ground transport and accommodations.

Travelers' hopes and expectations for the future of travel

Personal confidence about the safety of travel in light of COVID-19 means **over half (53%) of Singapore travelers expect to make fewer trips over the next 12 months**. This is closely followed by 52% of respondents who agree that they expect to make fewer trips due to Government travel restrictions.

Contactless and convenience is important for Singapore travelers, 46% would like touchless/contactless payments to be accepted around the world, so that they do not need to carry or exchange cash or input PIN numbers when traveling and **44% would like one universal digital traveler identification on their mobile phone that includes all necessary documentation and immunity status, that meant they only had to prove it once from leaving home to arriving at their destination**. A larger majority of respondents who have traveled just for leisure over the past 18 months (55%) agree that they expect to make fewer trips due to Government travel restrictions, compared to those respondents who have traveled just for business during this same timeframe (38%).

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 contact 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.

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 also equip them for the renewal and recovery we want to see.