

amadeus

Driving Change: Future Trends in Mobility 2024

Amadeus Insights

Driving Change:  
**Future Trends  
in Mobility  
2024**

It's how travel works.

# Foreword



Welcome to the report “Driving Change: Future Trends in Mobility 2024,” where we navigate the evolving landscape of the mobility industry through the lens of our comprehensive traveler survey. This report delves into the preferences, behaviors, and attitudes of travelers as they adapt to the ever-changing world of travel. Our goal is to provide a clear understanding of the many factors that influence mobility choices for today’s travelers, enabling you to better serve the travelers of tomorrow.

As we embark on this voyage through data and insights, we invite you to join us in uncovering the trends that are shaping the future of how we move when we take a trip. This report is not just a collection of statistics; it’s a narrative of progress, challenges, and the potential for innovation in the realm of mobility services.

Together, we will uncover the story that the numbers convey, setting the wheels in motion on this enlightening journey.

**Peter Altmann,**

Vice President, Mobility and Travel Protection, Hospitality, Amadeus




# About the Survey

**600** travelers from all regions responded to this survey:

- Asia Pacific
- Europe, the Middle East and Africa
- Americas

The survey was conducted by Amadeus from March to May 2024.



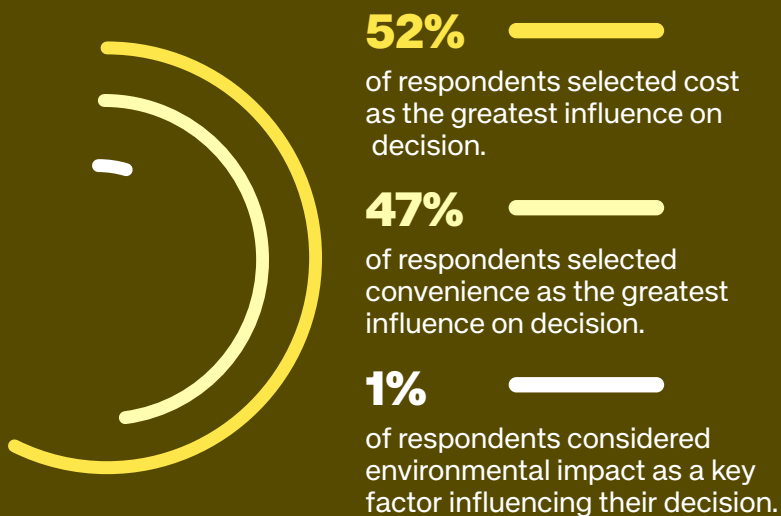
# Let's take a deep dive into the **Results**

1

# Factors influencing mobility choices

## Cost remains the key influential factor in choosing a mode of transportation

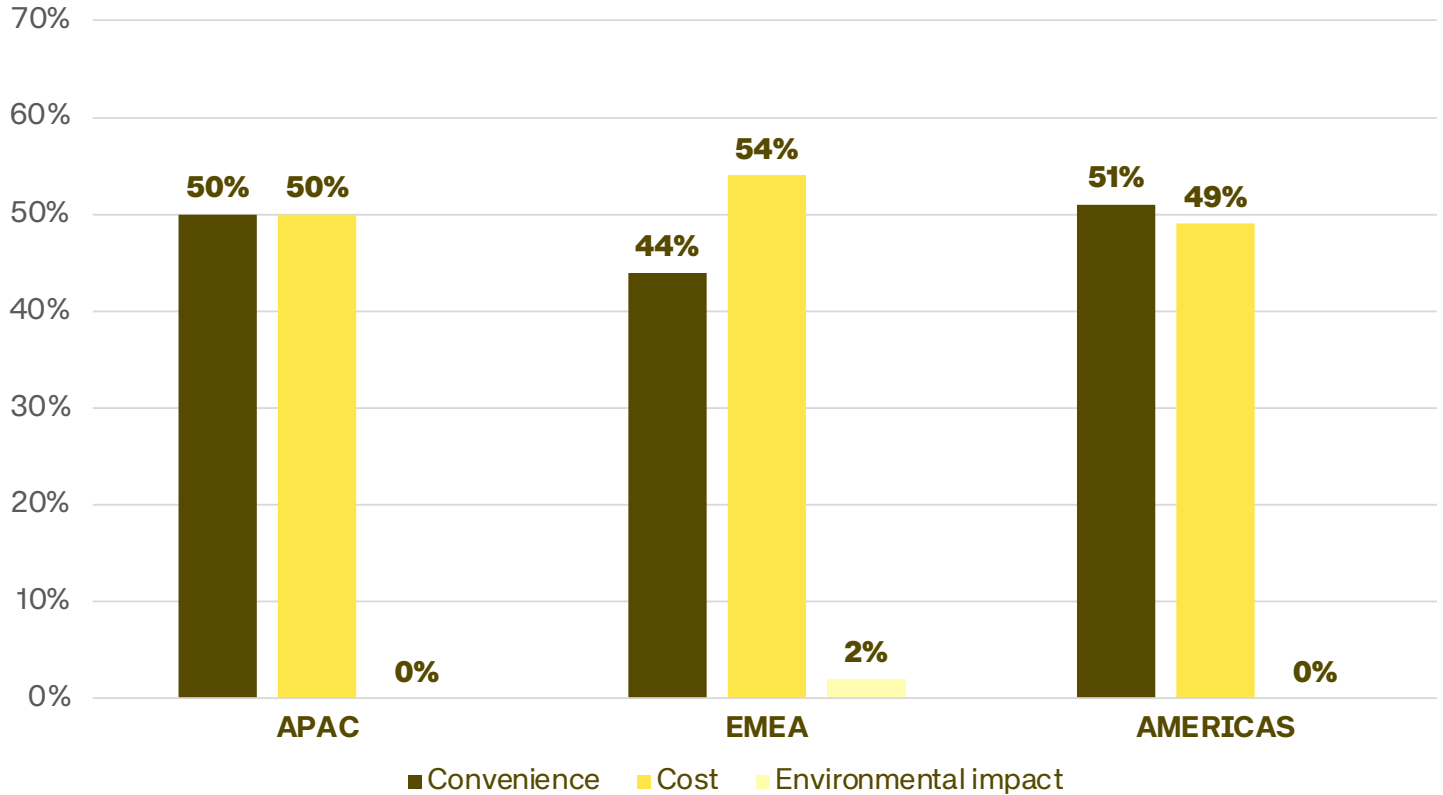
### Key factor in choosing a mode of transportation



Despite declaring willingness to pay for more sustainable options, travelers still prioritize economic and practical concerns when it comes to mobility.

# Regional breakdown

When choosing a mode of transportation for your journey, which factor has the greatest influence on your decision?



**EMEA** is the only region where a few respondents selected environmental impact as a consideration. For **EMEA**, cost (**54%**) was the most influential factor, followed by convenience (**44%**).

In the **AMERICAS**, convenience was the primary factor for **51%** of respondents, with cost following closely at **49%**.

In **APAC**, convenience and cost were equally ranked as influential in decision-making, each at **50%**.

Overall, environmental impact was not a primary factor; while awareness and emphasis on sustainability varied by region, they remained very low.

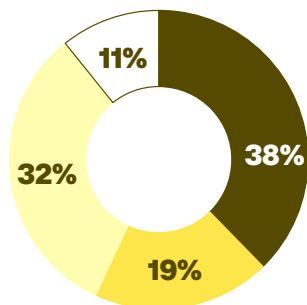


2

# Eco-friendly transportation: a green dilemma

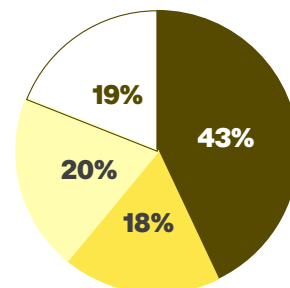
## Diverse attitudes toward sustainable transportation

Do you actively seek out or prefer eco-friendly transportation options such as electric cars, electric scooters, or bikes?



■ It depends ■ No ■ No preference □ Yes, always

Please explain why you selected 'It depends' as your response to the question, 'Do you actively seek out or prefer eco-friendly transportation options such as electric cars, electric scooters, or bikes?'



■ Cost ■ Availability ■ Distance of the trip □ Convenience

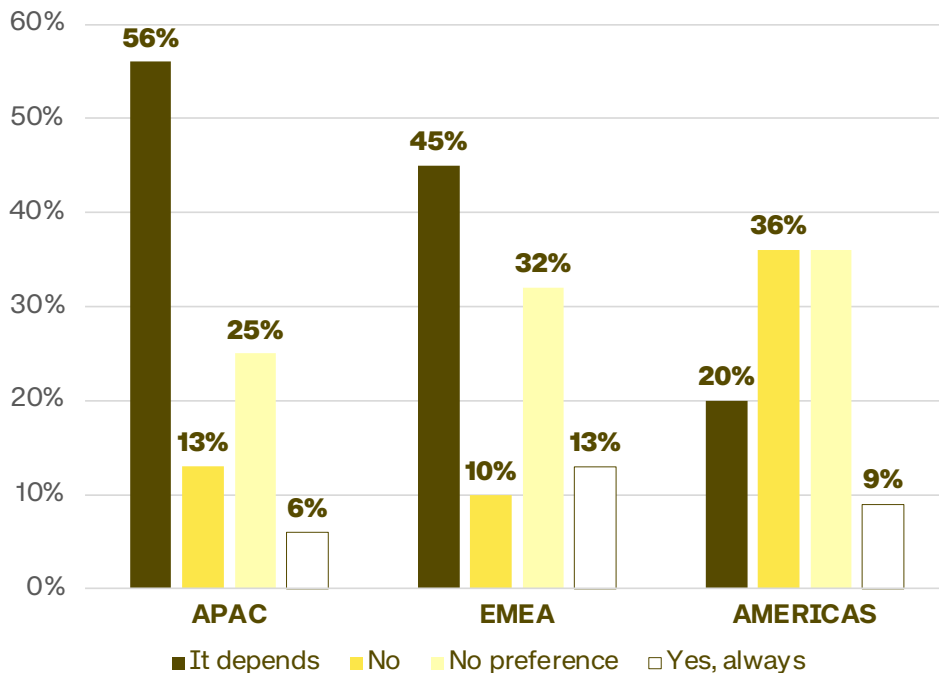
While there was a willingness to choose eco-friendly transportation (**38%**), practical considerations such as cost, and availability remained key factors in the decision-making process.

The lack of readily available, eco-friendly options was considered by some to be a barrier that might hinder more widespread adoption, despite the underlying interest in such alternatives.

Many respondents remained neutral, indicating they don't have a strong preference for or against eco-friendly modes of transport (**32%**).

## Regional breakdown

Do you actively seek out or prefer more eco-friendly transportation options such as electric cars, electric scooters, or bikes?

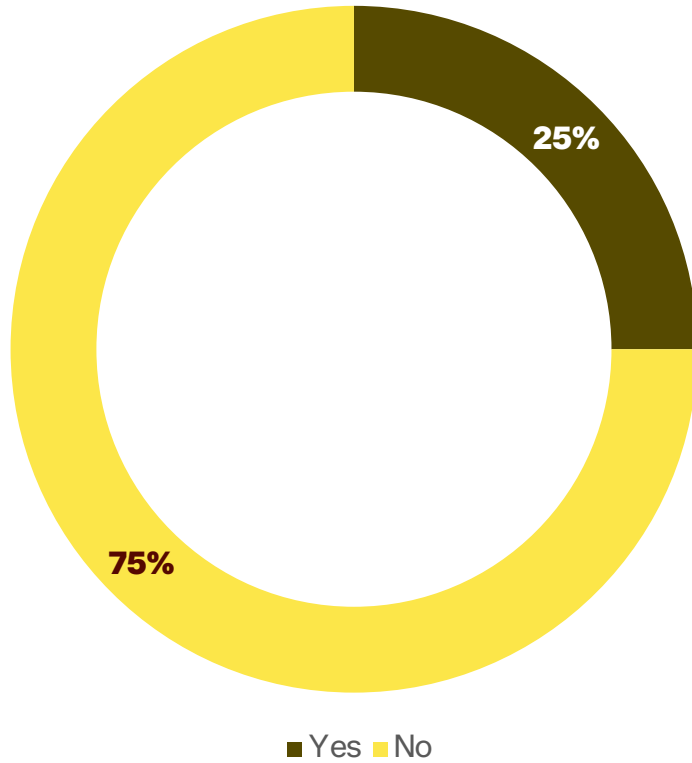


Here the graph illustrates the varying degrees of preference for more eco-friendly transportation options such as electric cars, scooters, and bikes across the various global regions.

It highlights a significant difference in attitudes, with **APAC** showing the strongest consideration to various options (**56%**), depending on the situation, while the **AMERICAS** have the highest percentage of respondents who do not prefer eco-friendly options (**36%**) compared to other regions.

# Transportation preference

Over the past year, have you experienced a change in your preferred mode of transportation?



**75%** of respondents did not experience a change in their preferred mode of transportation. This finding suggests a strong adherence to established transportation habits among the majority of respondents. It may indicate potential challenges in encouraging a shift towards more eco-friendly transportation options, as displayed earlier.

For those who experienced a change, the main reason was the pursuit of more eco-friendly options, with an increased usage of ride-hailing services, trains, and hybrid cars being cited as examples.

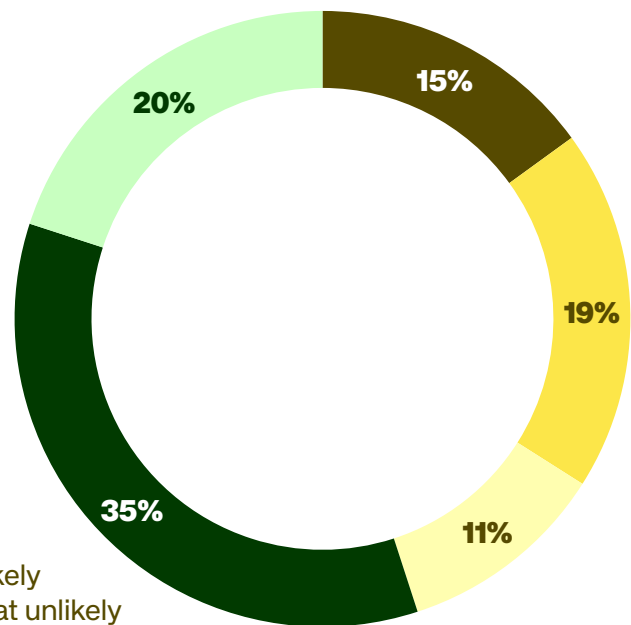


3

# The rise of peer-to-peer services: a market disruptor?

## Peer-to-peer services: a myth or a reality?

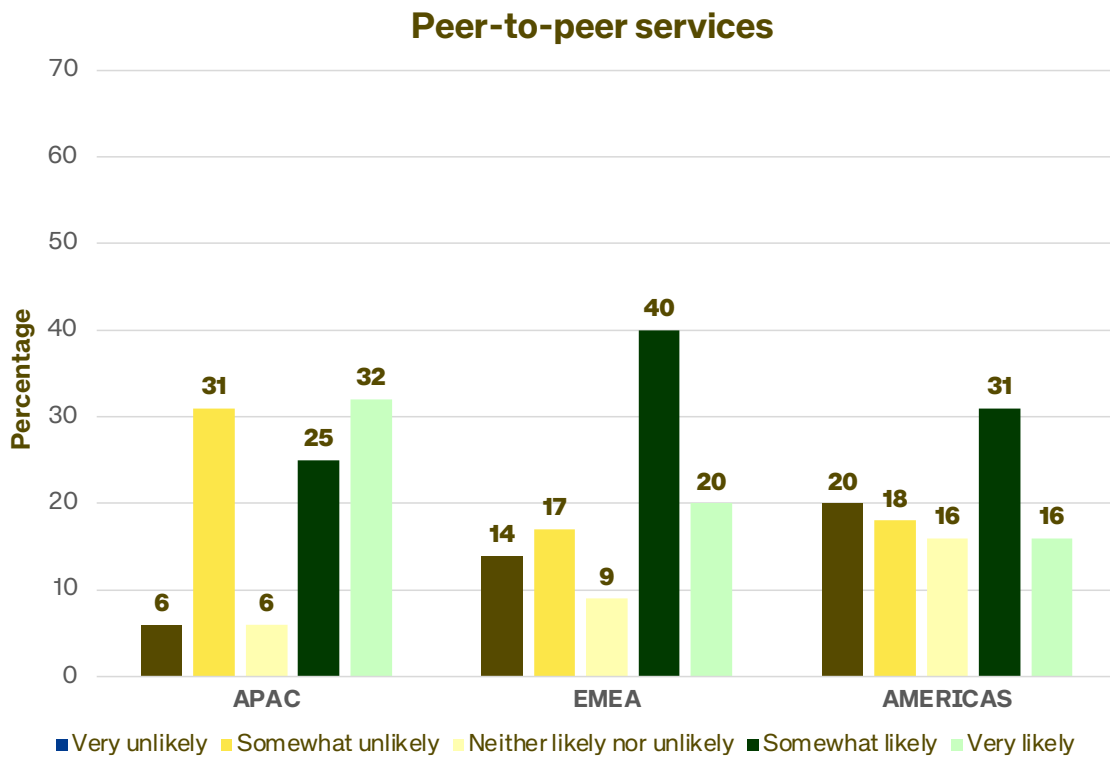
On a scale of 1 to 5 (with 1 being not likely at all and 5 being very likely), how likely are you, as a traveler, to consider utilizing peer-to-peer services in the future?



- Very unlikely
- Somewhat unlikely
- Neither likely or unlikely
- Somewhat likely
- Very likely

Often referred to as car sharing, peer-to-peer rental services are a type of car rental where people rent cars for short periods of time - often, on an hourly basis. It is an alternative to traditional car rental. Overall, over half of the survey respondents were open to utilizing peer-to-peer services.

## Regional breakdown



The most significant potential for adoption is in the **EMEA** region, where more than half the respondents (**60%**) were inclined to use peer-to-peer services.

In **APAC**, there is also a high potential for adoption, with **32%** of respondents indicating they were very likely to consider peer-to-peer services.

Finally, in the **AMERICAS**, almost half the respondents showed an interest in using peer-to-peer services; it's important to note, however, that **38%** are **NOT** inclined to use this service in this region. This variation

across the **Americas** might be attributed to the differences between **LATAM** and **NORAM** in terms of culture, infrastructure and other areas.



## Key takeaways on peer-to-peer services

Considering the growing trend toward shared economy services, it's evident that a significant number of travelers are open to embracing peer-to-peer platforms for their transportation needs.

Some respondents were keen to use these services for several reasons; they offer cost-effectiveness, convenience, competitive pricing, sustainability, and availability, all backed by transparent user reviews. As we move toward

a more connected and resource-conscious world, it's clear that these innovative solutions are not just a passing trend, but a reflection of what modern travelers seek.

Some respondents who are unlikely to use peer-to-peer services cited the reliability of the car (is the car safe? Is it regularly checked?) and the necessity for insurance as main challenges.

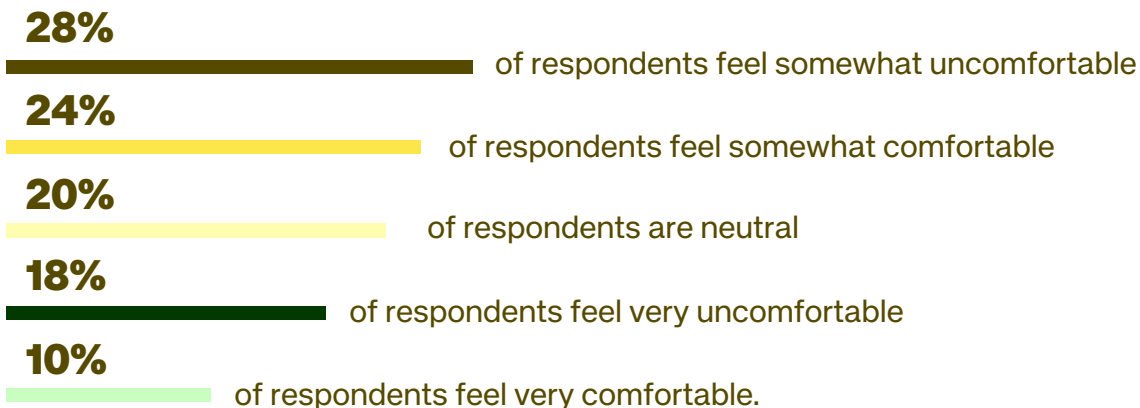


4

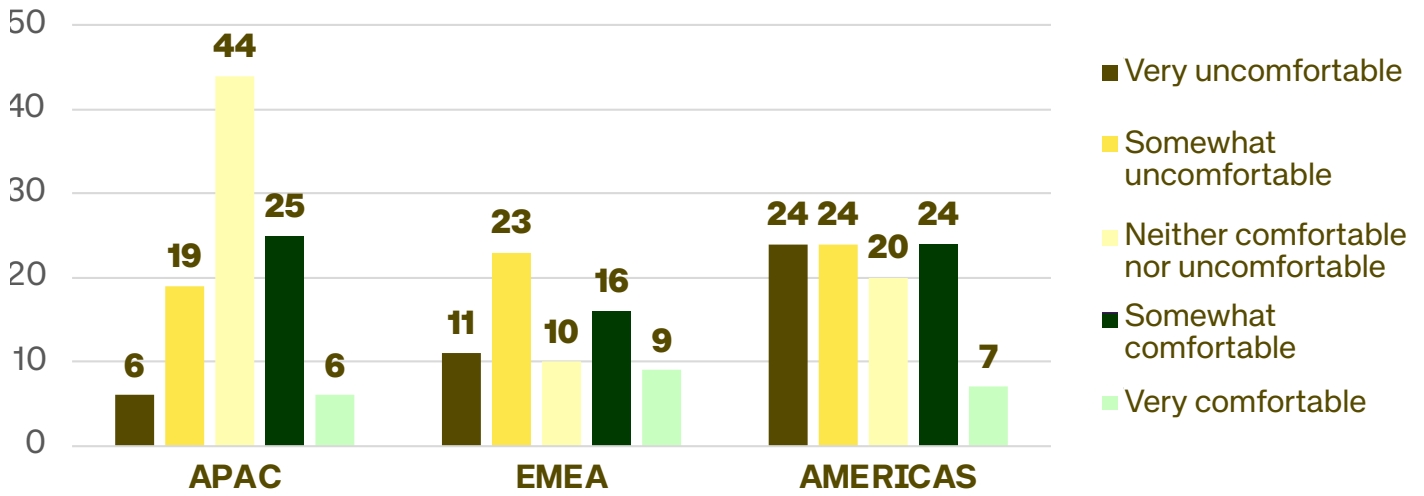
# Autonomous vehicles: How much do we trust technology?

## Autonomous Vehicles: what travelers truly think

On a scale from 1 to 5 (with 1 being very uncomfortable and 5 being very comfortable), how comfortable are you with the idea of using autonomous vehicles for your travels?



Regional split



Globally, **28%** of respondents were somewhat uncomfortable with the idea of using autonomous vehicles, **18%** were very uncomfortable, and **20%** of respondents were neither comfortable nor uncomfortable with that idea. Only **10%** were very comfortable with the idea of using autonomous vehicles.

Regionally, in **APAC**, there was no strong sentiment regarding this concept. In **EMEA**, almost one-third (**23%**) of respondents were somewhat uncomfortable with this idea. In the **AMERICAS**, **31%** were feeling positive about autonomous vehicles, and another **20%** did not have an opinion.

## 5

# Switching providers: What drives choice?

## Traveler preferences: key criteria for switching providers A clear emphasis on cost-effectiveness, convenience and trust

When considering a switch from one travel provider to another, travelers prioritize the following three criteria:

### 1. Better price and value for money

A significant **43%** of respondents indicated that obtaining more value for their money is a top priority when considering a switch.

### 2. More convenient rental locations

**21%** of travelers responded that the ease of accessing rental services plays a crucial role in their decision-making process.

### 3. Positive ratings and reviews

**19%** of respondents noted that trustworthiness and reputation, as evidenced by positive ratings and reviews, influence their choice of provider.

An additional **16%** of respondents appreciated the option to skip the rental counter, highlighting the importance of convenience and efficiency in the travel experience.

## 6

# The one-stop-shop app: Is this really needed?

## One app for everything?

A significant **66%** of participants rated the concept of a single app for managing various mobility services as very useful, suggesting that the majority would value and potentially utilize a single app.

This reflects a trend towards integrated solutions that streamline the planning and execution of journeys.

Survey results highlighted an opportunity to develop a comprehensive mobility app that consolidates different transportation options. Such an app might simplify the user experience by offering a one-stop platform for booking and managing travel, which aligns with the high percentage of users who favor the idea.

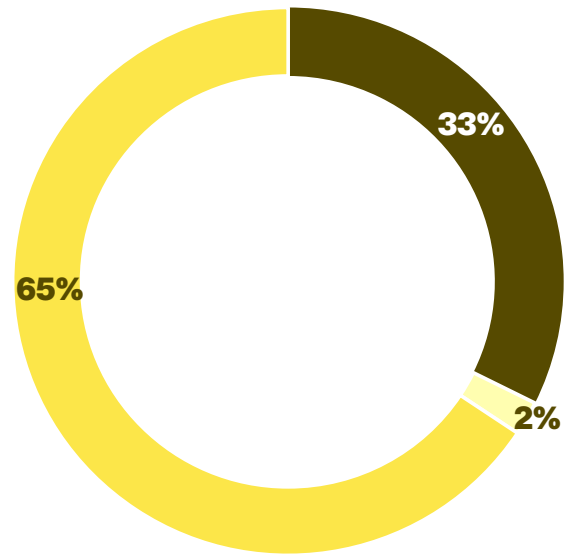
### Considerations for Development:

- **User interface:** Ensure the app is intuitive and user-friendly.
- **Service integration:** Seamlessly incorporate various mobility services.
- **Customization:** Allow users to personalize their experience based on preferences.
- **Accessibility:** Make the app accessible across different devices and platforms.

The overwhelming positive response to the concept of a unified mobility app underscores the potential market demand for such a product. It is advisable to consider the development of an app that taps into this growing interest

# Elevating travel with a one-stop booking solution?

How would an integrated booking experience, offering a hotel room along with services like car rental and travel protection in one simple reservation, impact your satisfaction?



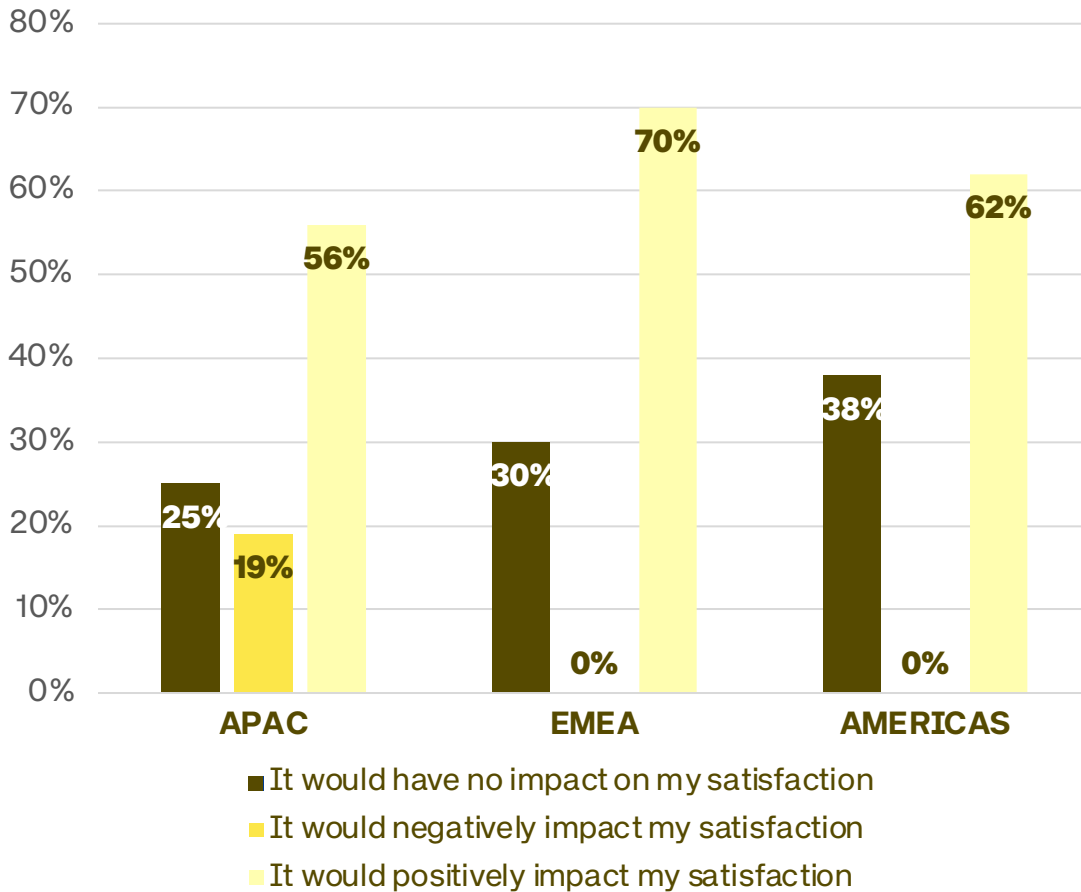
- It would have no impact on my satisfaction
- It would negatively impact my satisfaction
- It would positively impact my satisfaction



- **65%** of respondents globally felt that an integrated booking experience would have a positive impact on their satisfaction.
- One third indicated it would have no impact on their satisfaction.

# Regional split

How would an integrated booking experience, offering a hotel room along with services like car rental and travel protection in one simple reservation, impact your satisfaction?



Overall, an integrated booking experience would greatly impact satisfaction in **EMEA (70%)** and in the **AMERICAS (62%)**.

It was only in the **APAC** region where respondents indicated any kind of negative impact on satisfaction.

This slide highlights the overall positive reception of an integrated booking experience across different regions.



7

# Addressing the last mile challenge

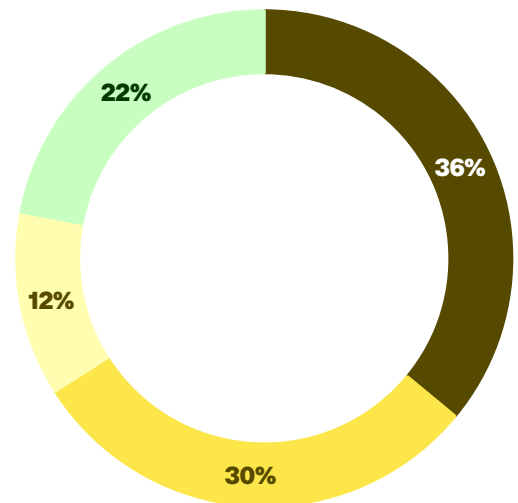


## The last mile of the journey at destination

Common concerns and feelings of travelers when arriving at an unfamiliar destination

When traveling to an unfamiliar destination, how does the idea of arranging your own transportation from the airport to your accommodation make you feel?

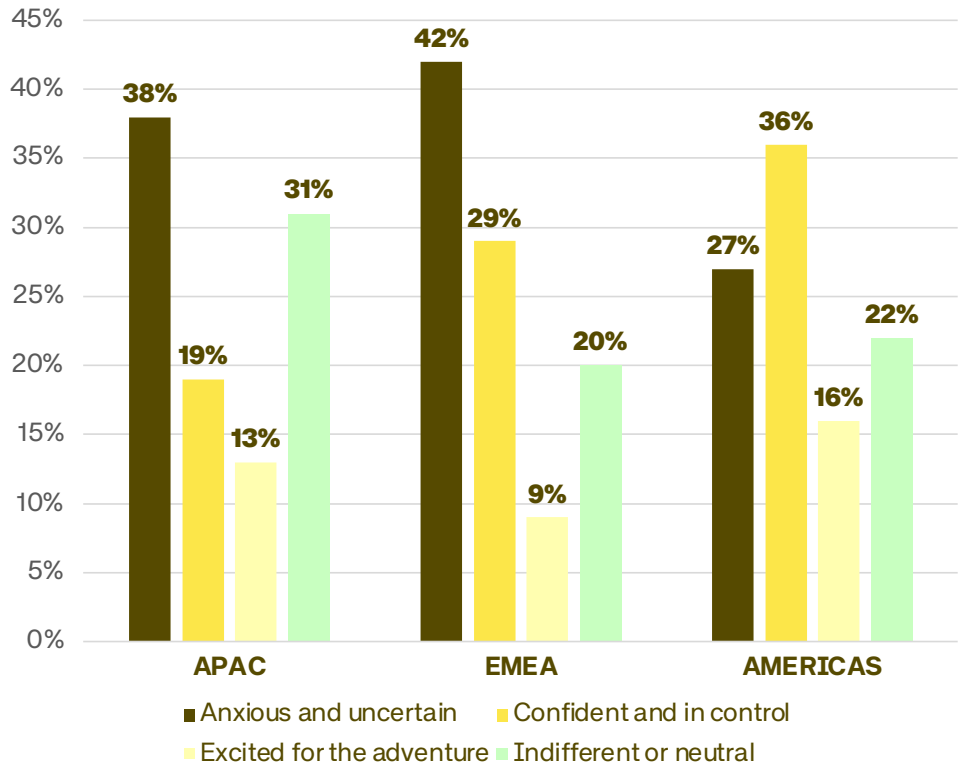
- Over one-third of respondents worldwide – **36%** – referenced feeling anxious and uncertain about arranging their own transportation from the airport to their accommodation.
- By contrast, close to an equal percentage feel confident and in control.



■ Anxious and uncertain      ■ Confident and in control  
■ Excited for the adventure      ■ Indifferent or neutral

# Regional focus

When traveling to an unfamiliar destination, how does the idea of arranging your own transportation from the airport to your accommodation make you feel?



Interestingly, respondents in **APAC** and **EMEA** responded that they felt the highest levels of anxiety and uncertainty when traveling to an unfamiliar destination.

In the **AMERICAS**, one-third of respondents expressed they felt confident and in control, but almost another third said they are anxious and uncertain.

The data revealed a significant variation in traveler confidence when broken down by region.



# Why are some travelers feeling anxious and uncertain?

**Currency**

*Language barrier*

Lack of information

**Cultural differences**

**Safety**

Context of the trip

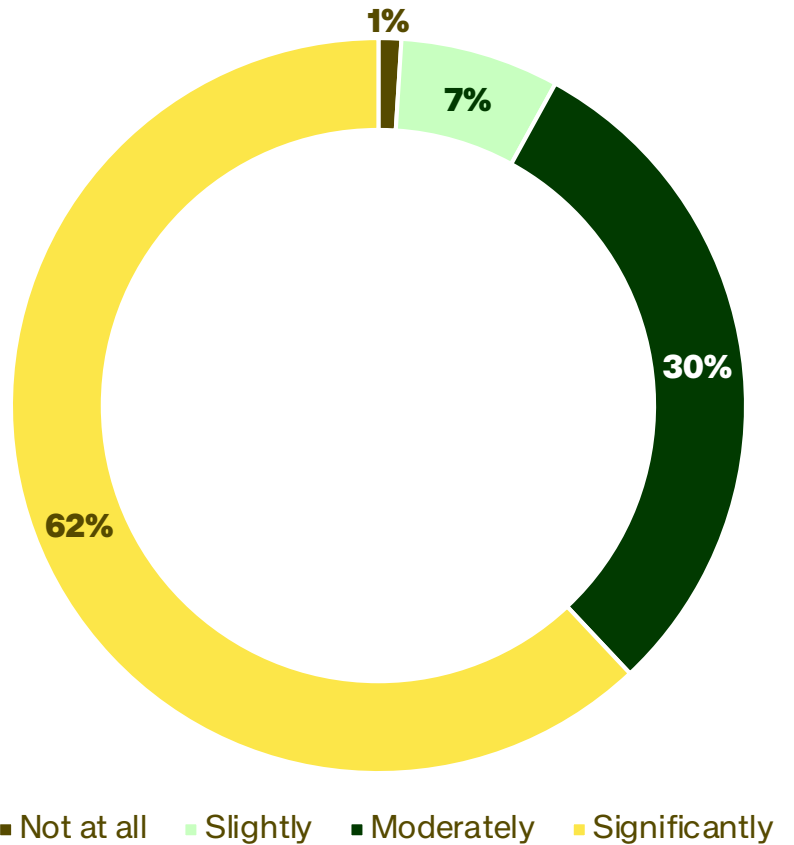
**Fatigue**

Travel requirements



# Prearranged transfer, a solution to enhance experiences

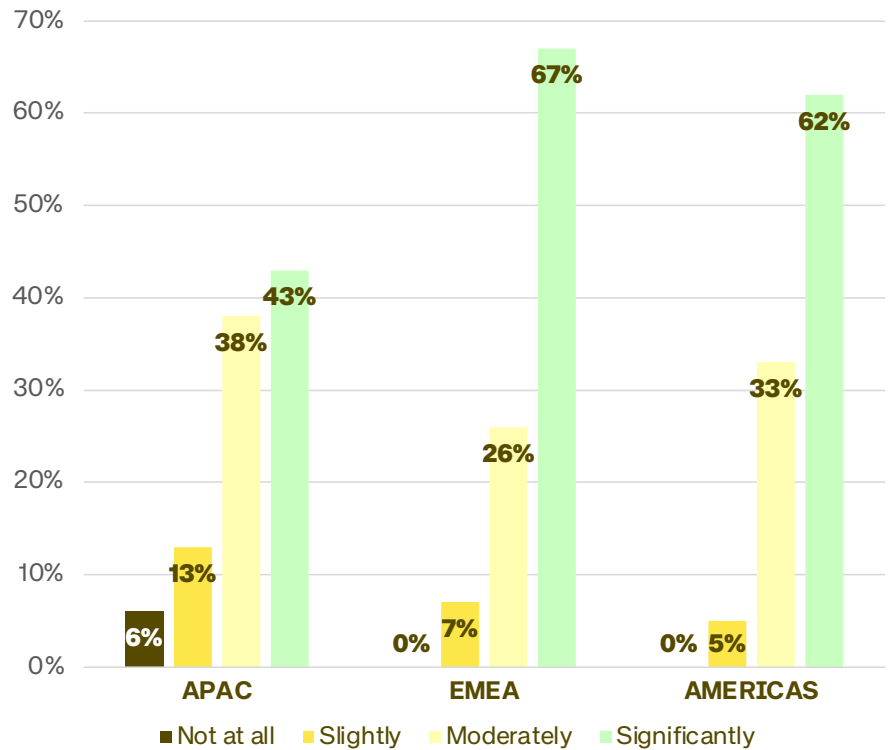
Considering factors such as convenience and peace of mind, to what extent would having a prearranged transfer upon arrival enhance your overall travel experience?



Globally, **62%** of respondents indicated that having a prearranged transfer upon arrival would significantly enhance their overall travel experience, and one-third expressed it would moderately enhance their overall travel experience.

# Regional breakdown

Considering factors such as convenience and peace of mind, to what extent would having a prearranged transfer upon arrival enhance your overall travel experience?



We can see that a significant percentage of respondents across all regions reported a preference to having prearranged transportation:

- **APAC: 43%** stated that prearranged transfers significantly enhance their experience.
- **EMEA:** A notable **67%** agreed that it improves their travel experience.
- **AMERICAS: 33%** of respondents said that prearranged transportation would only moderately improve the overall experience.

The survey indicated that it is important to consider prearranged transfers to improve customer satisfaction and the travel experience.

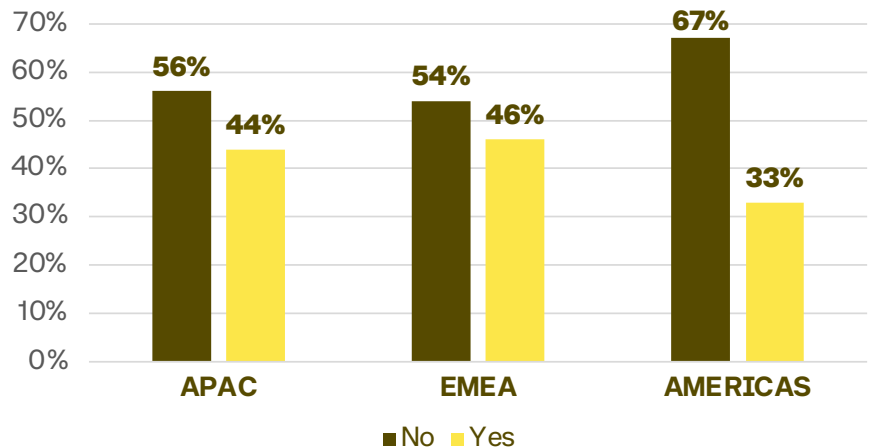
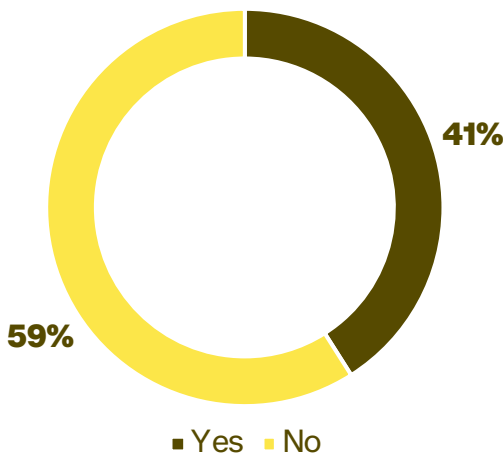


8

# The road ahead: Subscription service vs ownership?

## Subscription-based models with car rental integration

When looking at subscription-based models (e.g., monthly passes for transportation services), would the integration of car rental be appealing to you?





Responses revealed a mixed response to the integration of car rental services into subscription-based models, such as monthly transportation passes.

**Regional breakdown:**

- **APAC & EMEA:** More balanced views with **56%** of APAC and **54%** of EMEA respondents reported not being interested in subscription-based models.
- **AMERICAS:** Nearly **70%** of respondents in the Americas indicated no interest in the integration.

## Key takeaways for subscription-based models

For frequent travelers, subscription-based models offer a tangible benefit. Both business and leisure travelers recognize the value, which hinges on the flexibility and cost of the service.

The cost of the subscription needs to be less than the cost to rent a car and the model needs to be personalized to one’s own usage. Overall, it is clear that a one-size-fits-all model will not work. It needs to be personalized in order for it to be appealing. A few respondents stated that if designed properly, a subscription-based model could potentially offer significant value. In addition, respondents viewed a subscription-based model as a convenient tool, as everything would be managed in one place.

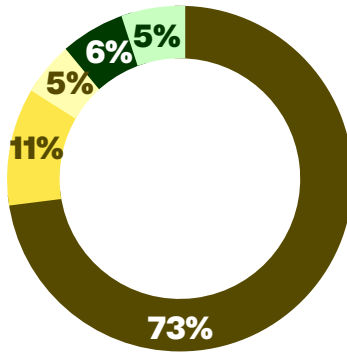
Some respondents stated that if they travel more frequently, they would certainly see the potential for greater value in a subscription-based model and the integration of car rental.

A few respondents affirmed that they are tired of any additional costs that may come with subscribing to yet another service.

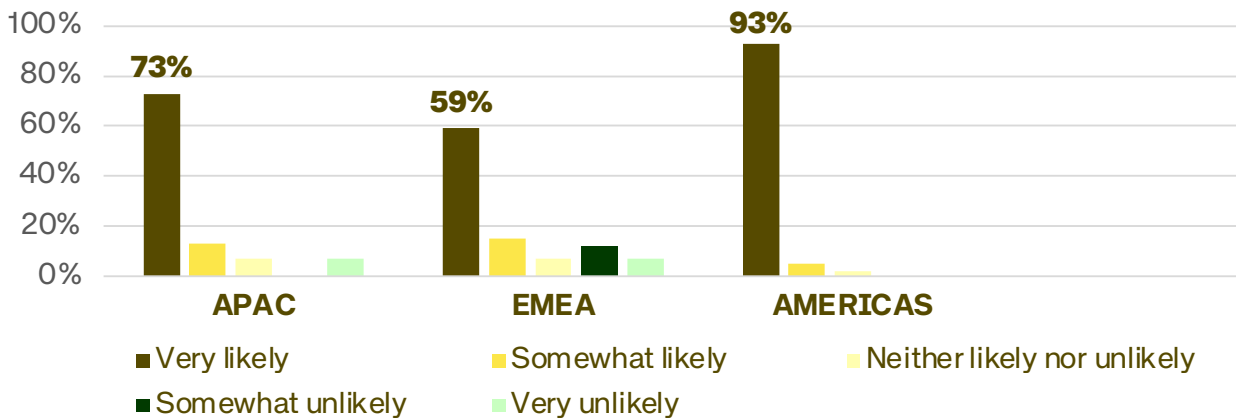


# Car ownership still remains very high

How likely are you to own a car over the next five years?



■ Very likely 
 ■ Somewhat likely 
 ■ Neither likely nor unlikely 
 ■ Somewhat unlikely 
 ■ Very unlikely



**77%** of respondents stated they are still very likely to own a car over the next five years, with just **5%** of respondents being very unlikely to own a car over that same time period.

The survey revealed no real strong regional differences. Respondents in the **AMERICAS** region followed by those in **APAC** and then in **EMEA** indicated that they are very likely to still own a car over the next 5 years, despite changing trends in mobility.

Only a small percentage of respondents reported that they are very unlikely to own a car, possible due to urban living or environmental concerns.

amadeus

# Thank You

For further information, contact us at [mobility@amadeus.com](mailto:mobility@amadeus.com) or speak to your Amadeus Mobility Account Manager today.

It's how  
travel works.

Find us on

