

Air Traveler Response to COVID-19

An 11-Country
Survey: Wave III

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Methodology

Wave 1 – February 2020

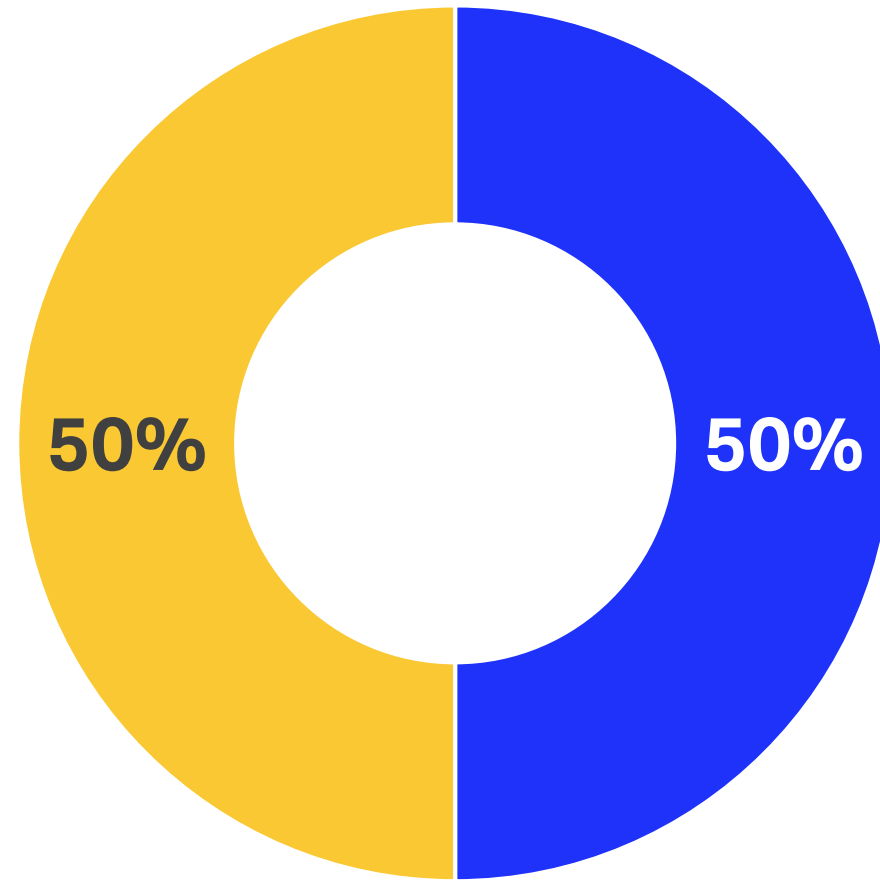
Wave 2 – April 2020

Wave 3 – June 2020

4,700

recent air travelers

(traveled since July 2019)



■ Business Traveler

■ Leisure Traveler

An invitation to participate in an on-line survey was sent to the panel members in the following countries:

Australia

Canada

Chile*

France

Germany

India

Japan

Singapore

United Arab Emirates

United Kingdom

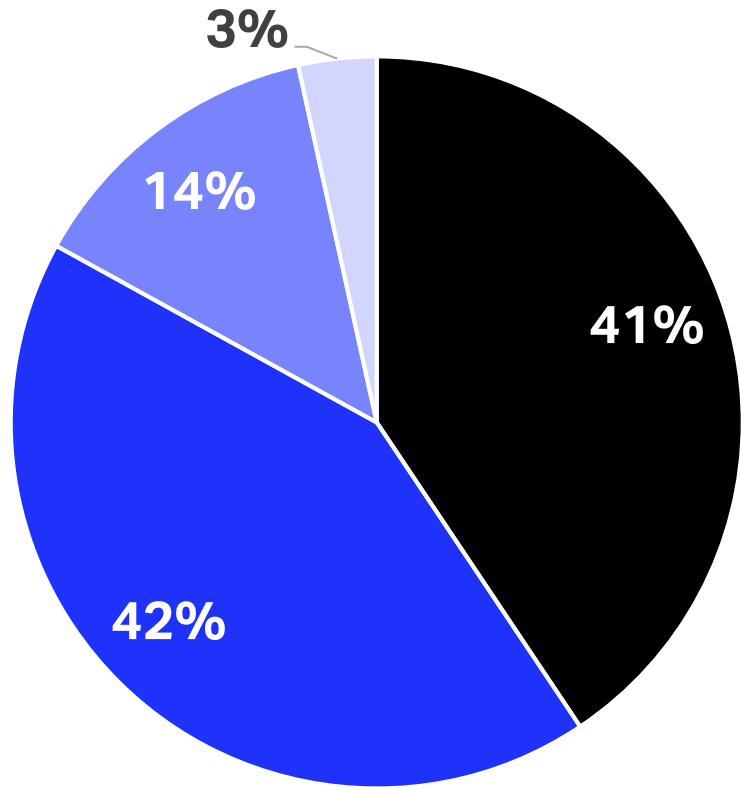
United States

IATA COVID-19 Passenger Insights – Issue 2

N=4,700

* Chile only included in April and June data

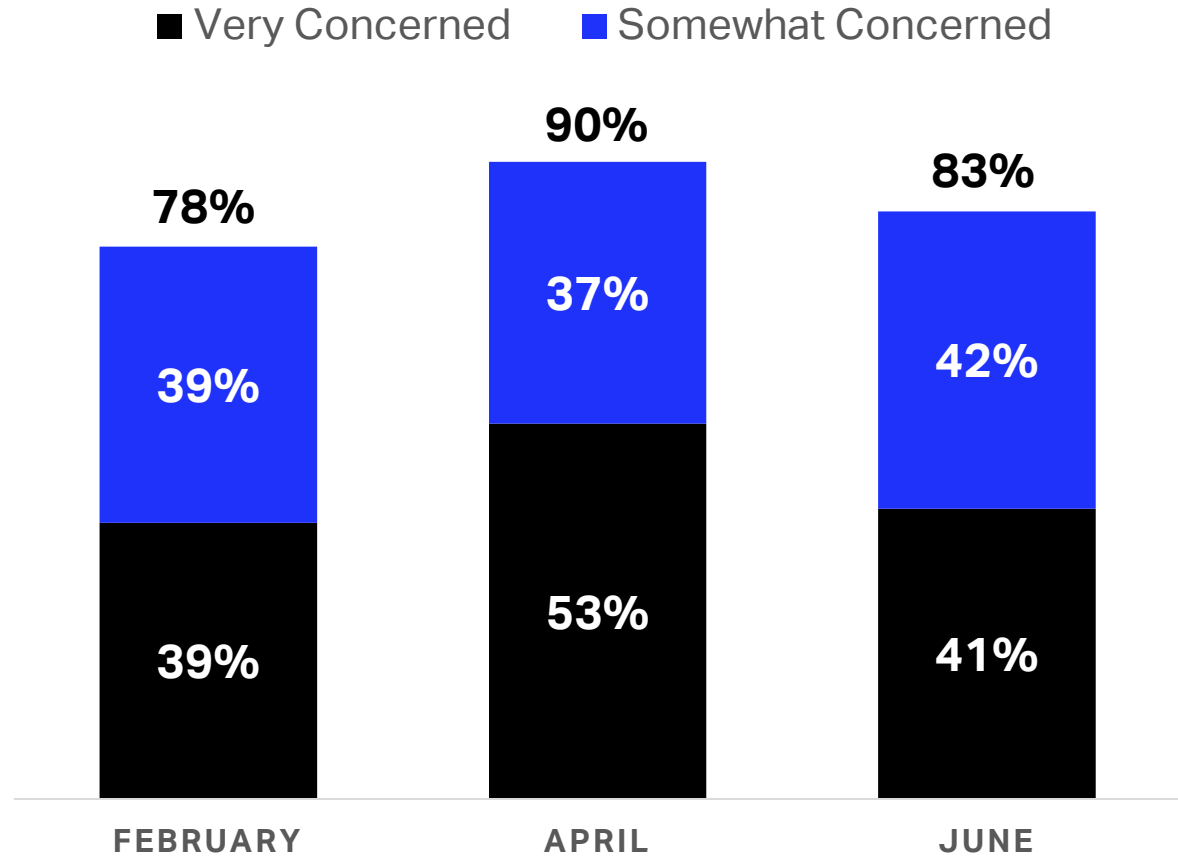
Concern about contracting the virus



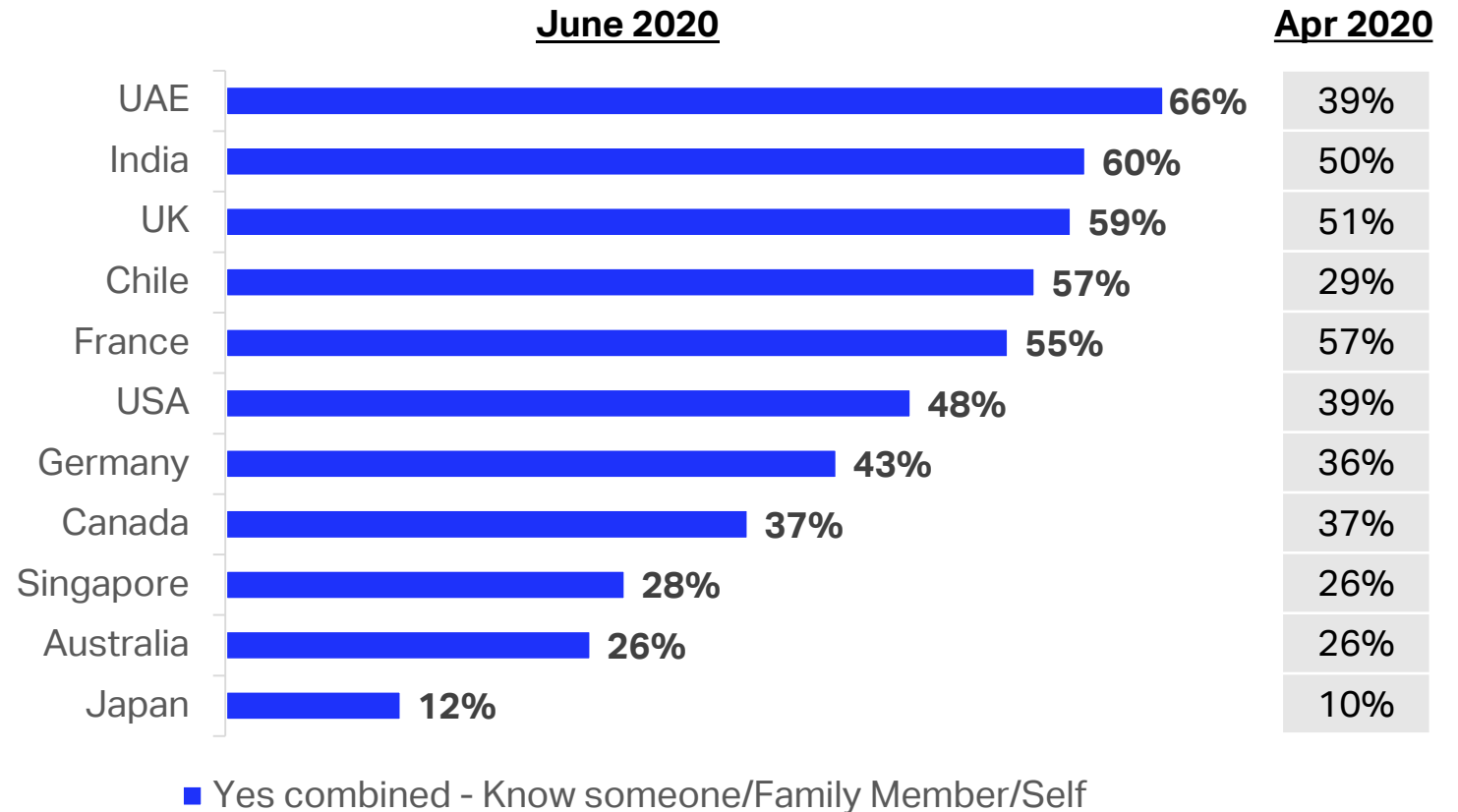
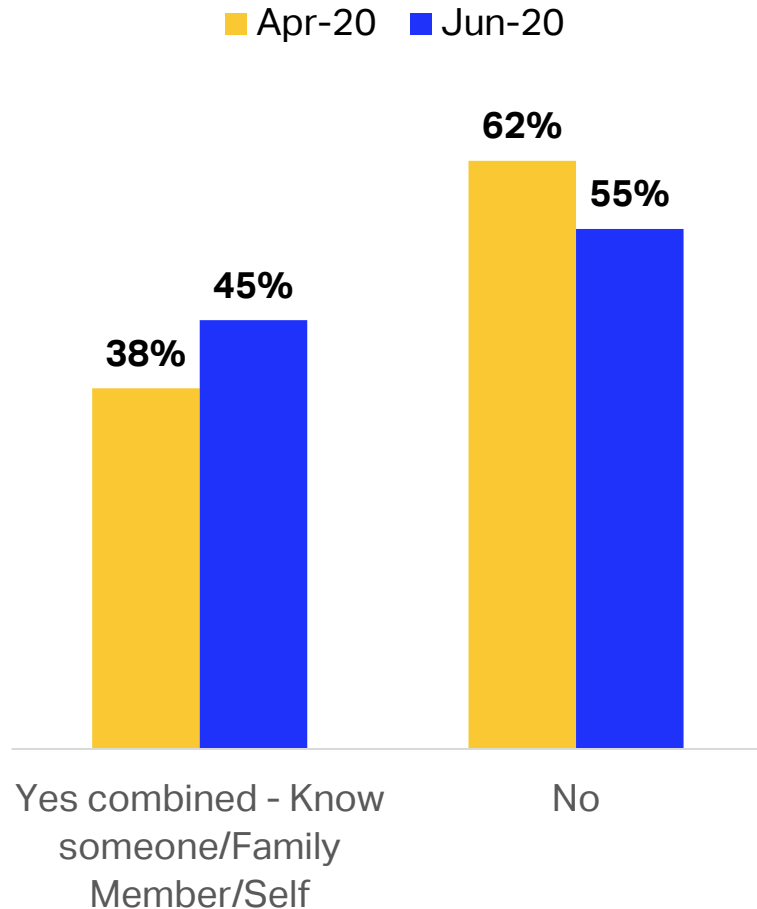
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned

N=4,700

Q: How concerned are you personally about contracting the coronavirus/COVID-19 – very concerned, somewhat concerned, not very concerned or not at all concerned?



Knowing someone who might be infected



N=4,700

Q: Have you, or do you personally know anyone, who has contracted coronavirus/COVID-19?

Steps to avoid contracting COVID-19

Have Taken Steps to Avoid Contracting COVID-19

Expect to Continue Taking Steps to Avoid Contracting COVID-19



N=4,700

Q: What steps, if any, have you taken specifically to avoid contracting the coronavirus/COVID-19?
 Once the pandemic has subsided, what steps, if any, do you expect to continue to take specifically to avoid contracting coronavirus/COVID-19?

Top concerns around contracting COVID-19

(% of people who included these concerns in their top three choices)

At the AIRPORT Top 3

- 59%** Being in a crowded bus/train on way to the aircraft
- 42%** Queueing at check-in /security /border control /boarding
- 38%** Using airport restrooms /toilet facilities

On board the AIRCRAFT Top 3

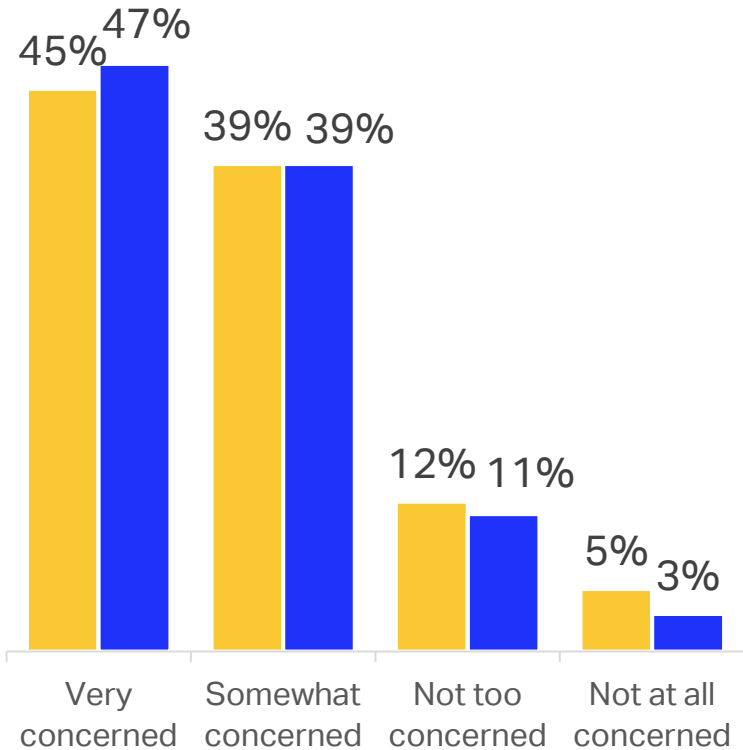
- 65%** Sitting next to someone who might be infected
- 42%** Using restroom /toilet facilities
- 37%** Breathing the air in the plane

N=4,700

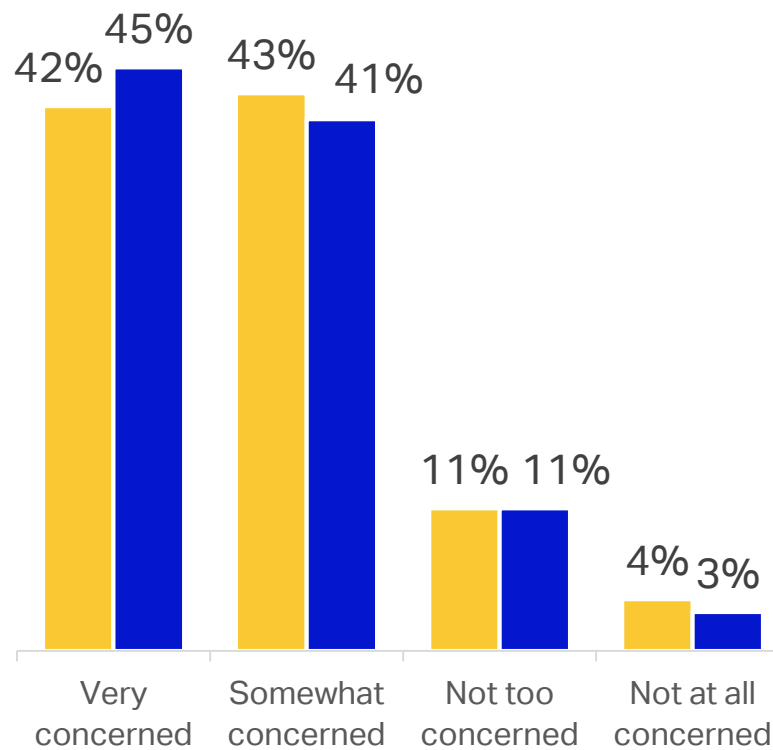
Q: Once the pandemic has subsided, how concerned would you be about each of the following at the airport / on board the aircraft – extremely concerned, somewhat concerned, not too concerned or not at all concerned?

Quarantine/infection concern stable since April

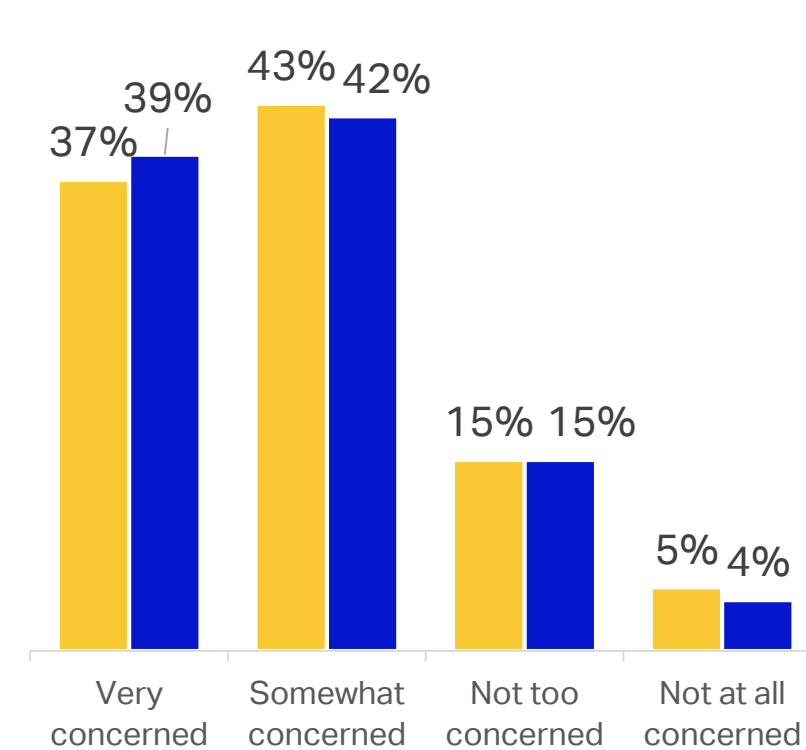
Concern about catching virus while traveling (%)



Concern about being quarantined while traveling (%)



Concern about being quarantined upon return from travel (%)



June 2020



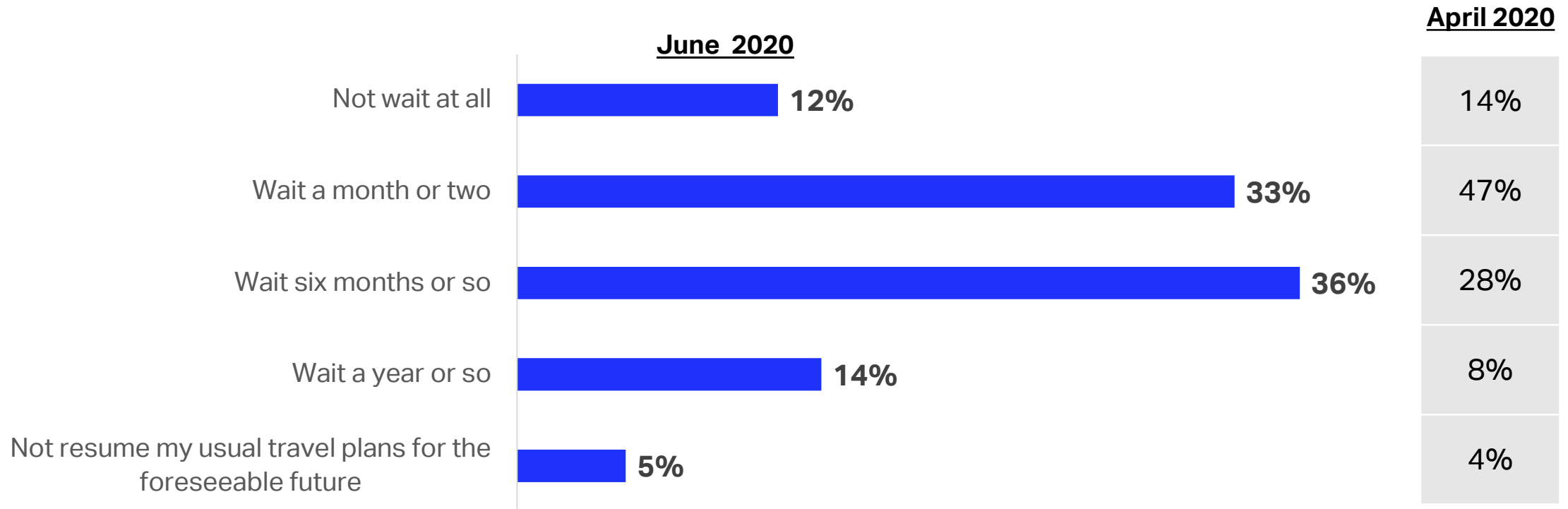
April 2020

N=4,700

Q: Once the pandemic has subsided, how concerned would you be about each of the following at the airport / on board the aircraft – extremely concerned, somewhat concerned, not too concerned or not at all concerned?

Return to travel: when?

When Will Passengers Return to Travel After Pandemic Subsided

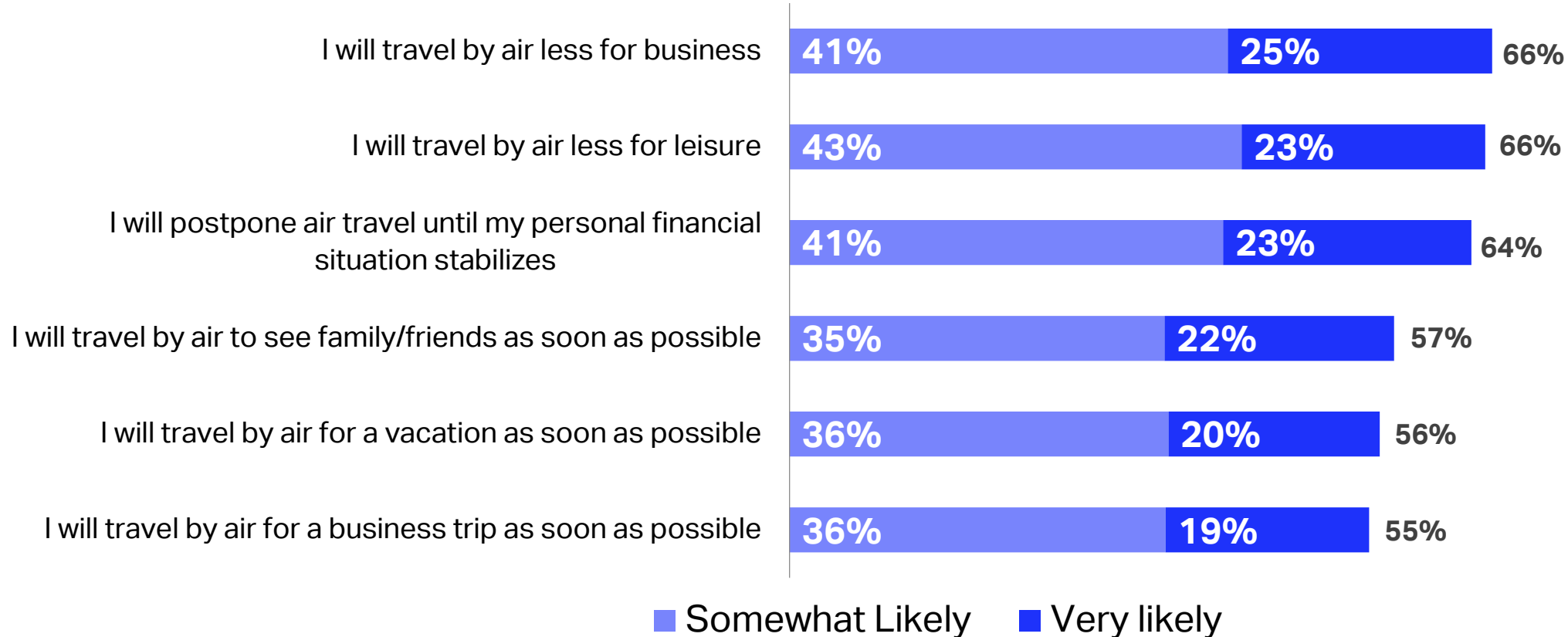


N=4,700

Q: Once the pandemic has subsided, how long would you wait, if at all, to return to your usual travel plans?

Expectations are to travel less once pandemic subsides But half will travel as soon as possible for specific purposes

Likelihood of doing once pandemic has subsided

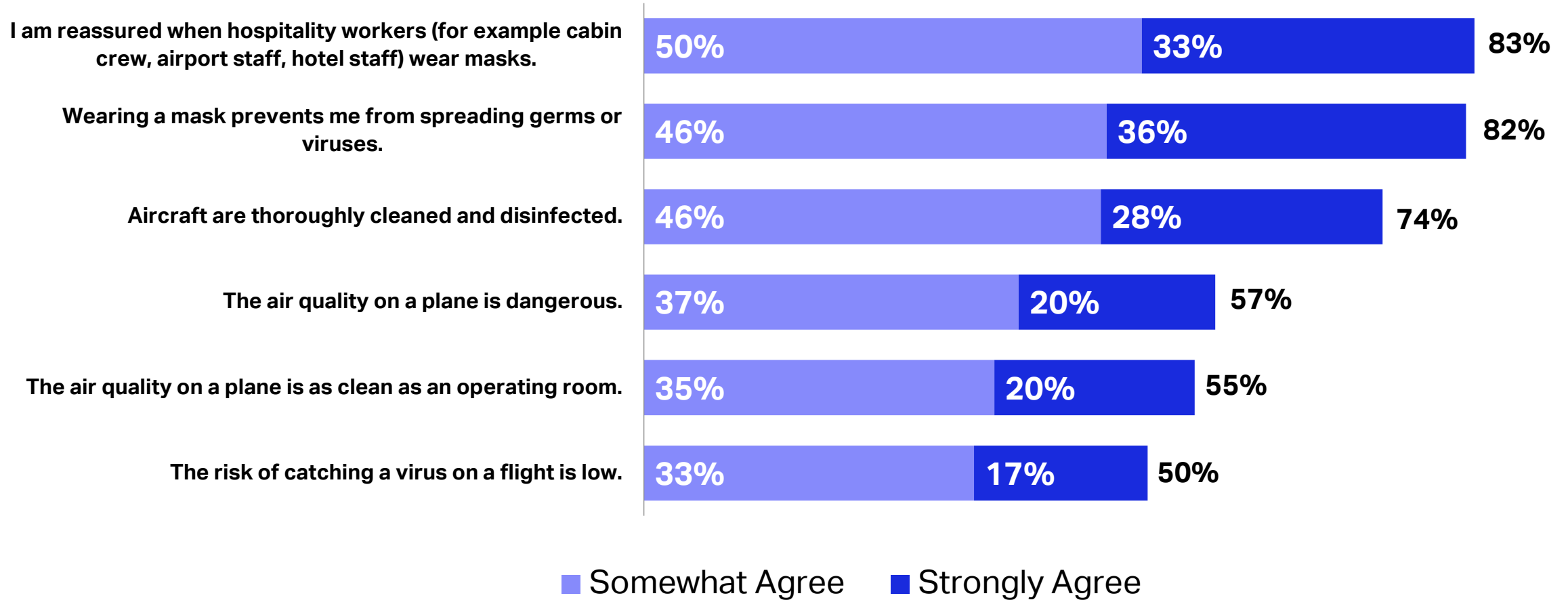


N=4,700

Q: Once the pandemic has subsided, how likely are you to do each of the following – very likely, somewhat likely, not too likely or not at all likely?

Travelers think masks help but uncertain over cabin air

June 2020

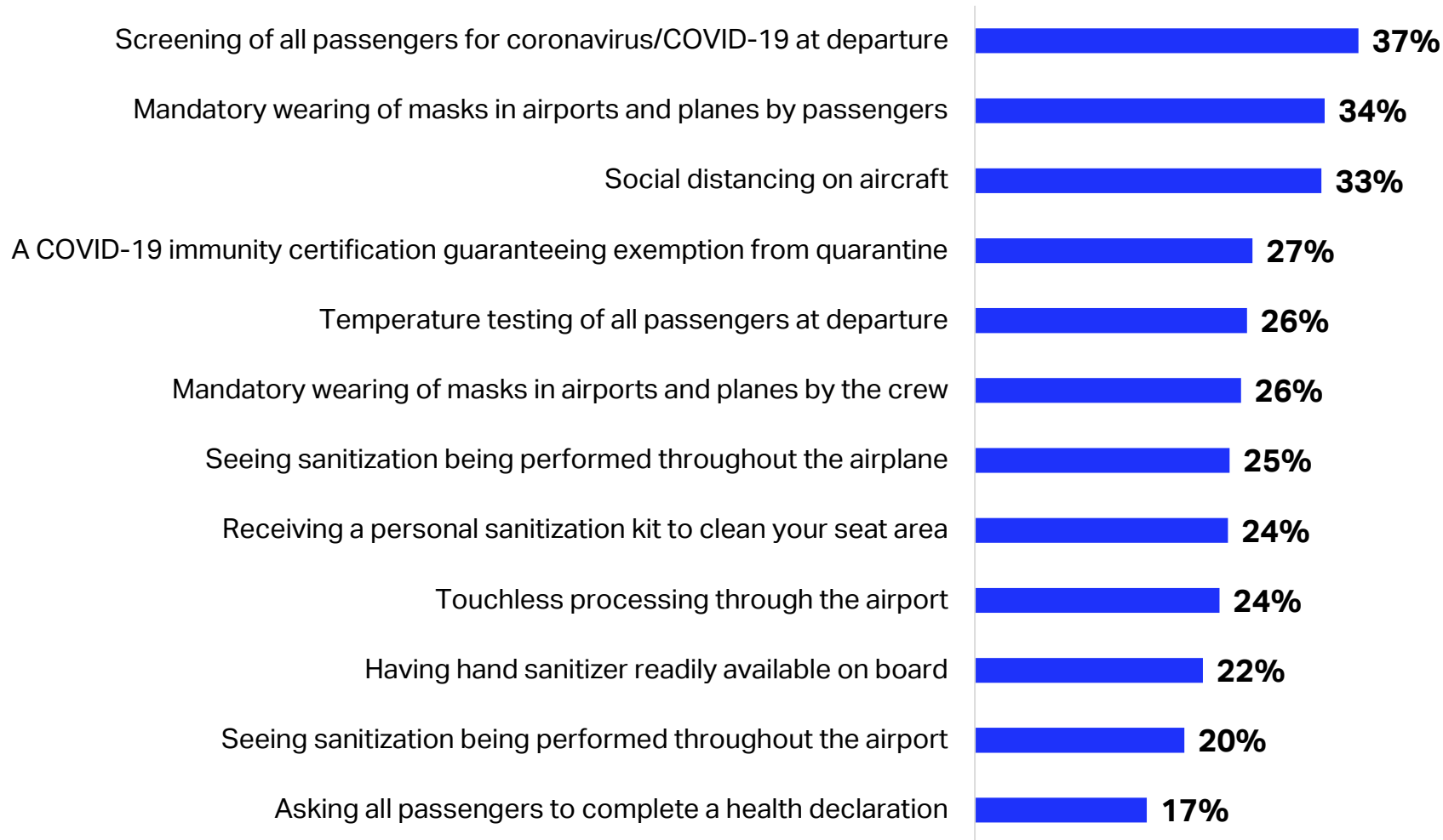


N=4,700

Q: Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

Top three measures that create a feeling of safety

(% of people who included these measures in their top three choices)

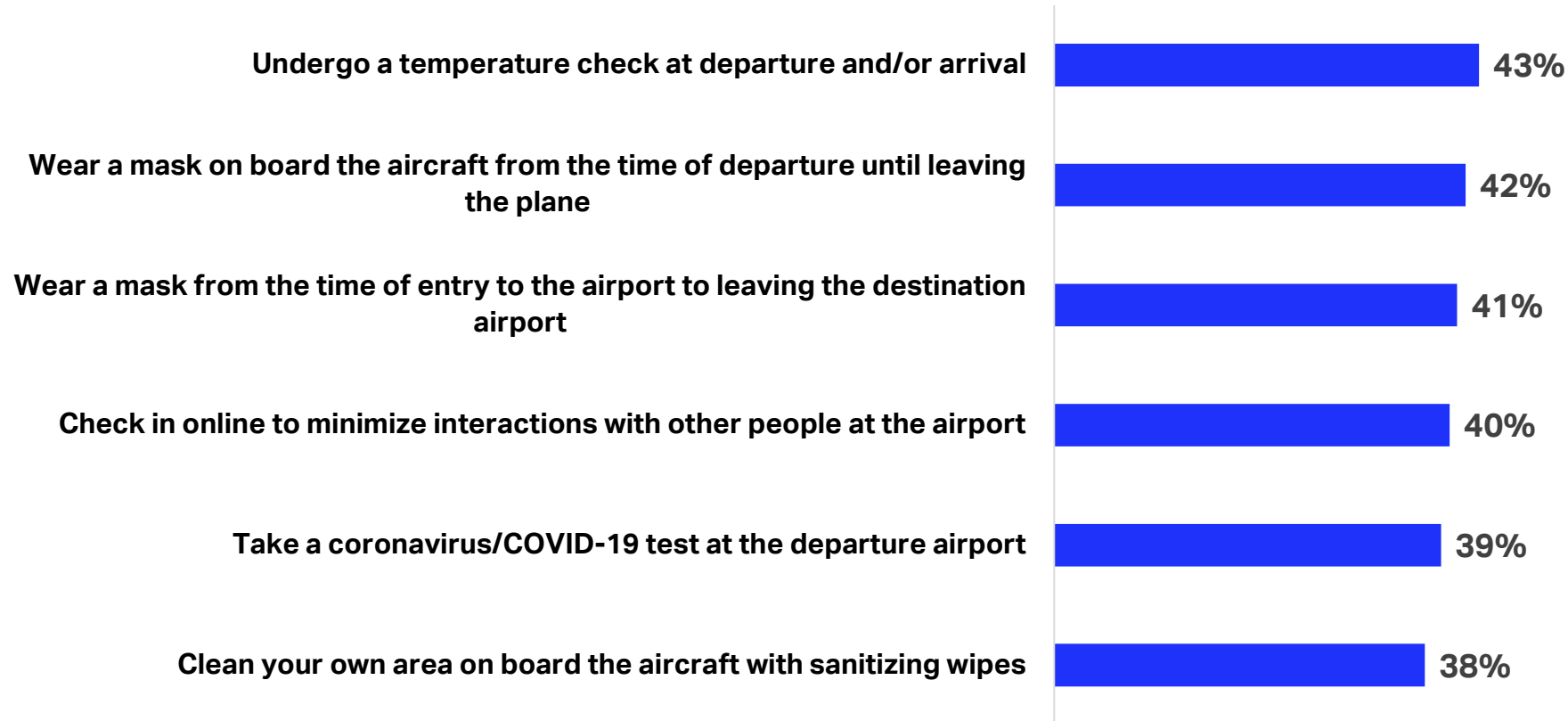


N=4,700

11 Q: Of the following, which three would make you feel safest?

Return to travel: willingness to adopt new measures

TOP 6



The least preferred option:

17%

are willing to undergo a 14-day self-isolation

N=4,700

Q: Once the pandemic has subsided, which of the following would you personally be willing to do during airplane travel?

COVID-19 insurance, and easier/cheaper visas appeal to two in five travelers

44% said that availability of insurance for COVID-19 disruptions would **increase their likelihood to start flying again**

42% said that cheaper/easier to obtain visas would make them **more likely to start traveling again**

Q. If there were insurance products available that covered cancellations or disruptions related to COVID-19, would you be more likely to start flying again, less likely, or wouldn't it make a difference to you?

Q. When travel restrictions have been relaxed, would you be more likely to fly to foreign destinations if visas were cheaper and easier to obtain, less likely, or wouldn't it make a difference to your foreign travel?

What's the profile of the first to return to the skies?

Who and where

- 12% of total
- Among not very or not at all concerned about COVID-19: 30%
- Among Leisure Travelers: 10%
- Among Business Travelers: 13%
- Most Prevalent Countries: France (19%), Germany (16%)
- Least Prevalent Countries: Singapore (5%), Japan (6%)

What would make feel safer (top five items)

- Mandatory masks for passengers (34%)
- Passenger screening at departure (32%)
- Social distancing onboard (31%)
- Temperature testing at departure (28%)
- Seeing airplane sanitization (28%)

Availability of visas and covid-19 insurance products affect on greater likelihood to start flying again

- Insurance products: 49% vs. 44% avg.
- Easier Visas for Foreign Travel: 51% vs. 42% avg.

Concerns at the airport and on the airplane

At the airport (top three concerns)

- Crowded bus/train (63%)
- Touching bins (41%)
- Queuing (40%)

On the airplane (top three concerns)

- Sit next to someone (67%)
- Air on plane (45%)
- Toilets (40%)

What want to know (top three items to feel a lot/some safer)

- Airport/airplane cleaning (85%)
- Airport/airplane staff tested /safe (79%)
- Destination COVID-19 free (78%)

Thank you

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