Air Traveler Response to COVID-19

An 11-Country Survey: Wave III

David B. Rockland, Ph.D.
Methodology

Wave 1 – February 2020
Wave 2 – April 2020
Wave 3 – June 2020

4,700 recent air travelers (traveled since July 2019)

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
2
* Chile only included in April and June data
Concern about contracting the virus

- Very concerned: 41%
- Somewhat concerned: 39%
- Not very concerned: 14%
- Not at all concerned: 3%

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**

<table>
<thead>
<tr>
<th>Country</th>
<th>June 2020</th>
<th>Apr 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE</td>
<td>66%</td>
<td>39%</td>
</tr>
<tr>
<td>India</td>
<td>60%</td>
<td>50%</td>
</tr>
<tr>
<td>UK</td>
<td>59%</td>
<td>51%</td>
</tr>
<tr>
<td>Chile</td>
<td>57%</td>
<td>29%</td>
</tr>
<tr>
<td>France</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>USA</td>
<td>48%</td>
<td>39%</td>
</tr>
<tr>
<td>Germany</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>Canada</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>Singapore</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Australia</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Japan</td>
<td>12%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

N=4,700
Steps to avoid contracting COVID-19

Have Taken Steps to Avoid Contracting COVID-19

- Washed your hands more often: 77%
- Avoided being in large meetings: 71%
- Worn a mask when in public: 67%
- Avoided being in public places: 66%
- Avoided air travel: 58%
- Used more disinfectants when traveling: 46%
- Worn gloves in public: 36%
- I have not taken any steps: 2%

Expect to Continue Taking Steps to Avoid Contracting COVID-19

- Wash your hands often: 73%
- Avoid being in large meetings: 56%
- Wear a mask when in public: 55%
- Use disinfectants when traveling: 55%
- Avoid being in public places: 44%
- Avoid air travel: 33%
- Wear gloves in public: 29%
- I will not take any steps: 4%

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)

<table>
<thead>
<tr>
<th>At the AIRPORT Top 3</th>
<th>On board the AIRCRAFT Top 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>59%</strong> Being in a crowded bus/train on way to the aircraft</td>
<td><strong>65%</strong> Sitting next to someone who might be infected</td>
</tr>
<tr>
<td><strong>42%</strong> Queueing at check-in /security /border control /boarding</td>
<td><strong>42%</strong> Using restroom /toilet facilities</td>
</tr>
<tr>
<td><strong>38%</strong> Using airport restrooms /toilet facilities</td>
<td><strong>37%</strong> Breathing the air in the plane</td>
</tr>
</tbody>
</table>

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 (%)

- Very concerned: 45% June 2020, 47% April 2020
- Somewhat concerned: 39% June 2020, 39% April 2020
- Not too concerned: 12% June 2020, 11% April 2020
- Not at all concerned: 5% June 2020, 3% April 2020

Concern about being quarantined while traveling (%)

- Very concerned: 42% June 2020, 45% April 2020
- Somewhat concerned: 43% June 2020, 43% April 2020
- Not too concerned: 41% June 2020, 41% April 2020
- Not at all concerned: 11% June 2020, 11% April 2020

Concern about being quarantined upon return from travel (%)

- Very concerned: 37% June 2020, 39% April 2020
- Somewhat concerned: 43% June 2020, 42% April 2020
- Not too concerned: 15% June 2020, 15% April 2020
- Not at all concerned: 5% June 2020, 4% 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

- **June 2020**
  - Not wait at all: 12%
  - Wait a month or two: 33%
  - Wait six months or so: 36%
  - Wait a year or so: 14%
  - Not resume my usual travel plans for the foreseeable future: 5%

- **April 2020**
  - Not wait at all: 14%
  - Wait a month or two: 47%
  - Wait six months or so: 28%
  - Wait a year or so: 8%
  - Not resume my usual travel plans for the foreseeable future: 4%

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Somewhat Likely</th>
<th>Very Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will travel by air less for business</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>I will travel by air less for leisure</td>
<td>43%</td>
<td>23%</td>
</tr>
<tr>
<td>I will postpone air travel until my personal financial situation stabilizes</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>I will travel by air to see family/friends as soon as possible</td>
<td>35%</td>
<td>22%</td>
</tr>
<tr>
<td>I will travel by air for a vacation as soon as possible</td>
<td>36%</td>
<td>20%</td>
</tr>
<tr>
<td>I will travel by air for a business trip as soon as possible</td>
<td>36%</td>
<td>19%</td>
</tr>
</tbody>
</table>

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

The risk of catching a virus on a flight is low.

The air quality on a plane is as clean as an operating room.

The air quality on a plane is dangerous.

Aircraft are thoroughly cleaned and disinfected.

Wearing a mask prevents me from spreading germs or viruses.

I am reassured when hospitality workers (for example cabin crew, airport staff, hotel staff) wear masks.

N=4,700

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

June 2020

Somewhat Agree | Strongly Agree
---|---
I am reassured when hospitality workers (for example cabin crew, airport staff, hotel staff) wear masks. | 50% | 33% | 83%
Wearing a mask prevents me from spreading germs or viruses. | 46% | 36% | 82%
Aircraft are thoroughly cleaned and disinfected. | 46% | 28% | 74%
The air quality on a plane is dangerous. | 37% | 20% | 57%
The air quality on a plane is as clean as an operating room. | 35% | 20% | 55%
The risk of catching a virus on a flight is low. | 33% | 17% | 50%
Top three measures that create a feeling of safety

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

<table>
<thead>
<tr>
<th>Measure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screening of all passengers for coronavirus/COVID-19 at departure</td>
<td>37%</td>
</tr>
<tr>
<td>Mandatory wearing of masks in airports and planes by passengers</td>
<td>34%</td>
</tr>
<tr>
<td>Social distancing on aircraft</td>
<td>33%</td>
</tr>
<tr>
<td>A COVID-19 immunity certification guaranteeing exemption from quarantine</td>
<td>27%</td>
</tr>
<tr>
<td>Temperature testing of all passengers at departure</td>
<td>26%</td>
</tr>
<tr>
<td>Mandatory wearing of masks in airports and planes by the crew</td>
<td>26%</td>
</tr>
<tr>
<td>Seeing sanitation being performed throughout the airplane</td>
<td>25%</td>
</tr>
<tr>
<td>Receiving a personal sanitation kit to clean your seat area</td>
<td>24%</td>
</tr>
<tr>
<td>Touchless processing through the airport</td>
<td>24%</td>
</tr>
<tr>
<td>Having hand sanitizer readily available on board</td>
<td>22%</td>
</tr>
<tr>
<td>Seeing sanitation being performed throughout the airport</td>
<td>20%</td>
</tr>
<tr>
<td>Asking all passengers to complete a health declaration</td>
<td>17%</td>
</tr>
</tbody>
</table>
Return to travel: willingness to adopt new measures

N=4,700

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

TOP 6

- Undergo a temperature check at departure and/or arrival: 43%
- Wear a mask on board the aircraft from the time of departure until leaving the plane: 42%
- Wear a mask from the time of entry to the airport to leaving the destination airport: 41%
- Check in online to minimize interactions with other people at the airport: 40%
- Take a coronavirus/COVID-19 test at the departure airport: 39%
- Clean your own area on board the aircraft with sanitizing wipes: 38%

The least preferred option:

17% are willing to undergo a 14-day self-isolation.
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%)

**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 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%)

**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%)

**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.
Thank you

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