Air Traveler Response to COVID-19

An 11-Country Survey: Wave V
68% say travel restrictions have negatively impacted their quality of life.

Q26c. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? My quality of life has suffered as a result of travel restrictions.

Q28. Which of the following impacted you personally as a result of COVID-19 travel restrictions? Please check all that apply.

- Unable to see family members: 46%
- Feeling the loss of freedom that comes with flying: 45%
- Mental stress of feeling contained/isolated: 38%
- Missing a key human moment – wedding, funeral, family gathering…: 38%
- Unable to do business normally: 36%
- Inability to connect with other people in my professional field: 30%

*Numbers may not always add up due to rounding.
Balancing COVID-19 risk versus the economic benefit of re-opening borders

Beliefs About Current Restrictions*

- COVID-19 will not disappear so we need to manage its risks while living and traveling normally: 37% Agree strongly, 47% Agree somewhat, 87% Overall agreement.
- I am frustrated by COVID-19 air travel restrictions: 26% Agree strongly, 36% Agree somewhat, 62% Overall agreement.
- I think the air travel restrictions go too far: 21% Agree strongly, 28% Agree somewhat, 49% Overall agreement.

Beliefs About Reopening Borders*

- When it comes to opening borders, we need to find the right balance between managing COVID-19 risk and getting the economy going again: 38% Agree strongly, 50% Agree somewhat, 88% Overall agreement.
- Governments should set COVID-19 targets (such as testing capacity or people vaccinated) to re-open borders: 35% Agree strongly, 50% Agree somewhat, 85% Overall agreement.
- Country borders should be opened progressively as COVID-19 cases decrease: 28% Agree strongly, 53% Agree somewhat, 80% Overall agreement.
- Border closures should end as testing and vaccine capacity increases: 27% Agree strongly, 44% Agree somewhat, 71% Overall agreement.

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Q26. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? Q24. When it comes to the COVID-related air travel restrictions in your country, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following?
Improving news on a return to travel….

How Long Will People Wait to Travel Once Pandemic is Contained?

- **Not wait at all**
  - Feb-21: 15%
  - Sep-20: 14%
  - Jun-20: 14%
  - Apr-20: 14%

- **Wait a month or two**
  - Feb-21: 38%
  - Sep-20: 33%
  - Jun-20: 36%
  - Apr-20: 47%

- **Wait six months or so**
  - Feb-21: 29%
  - Sep-20: 32%
  - Jun-20: 36%
  - Apr-20: 28%

- **Wait a year or so**
  - Feb-21: 11%
  - Sep-20: 15%
  - Jun-20: 14%
  - Apr-20: 8%

- **Not resume in foreseeable future**
  - Feb-21: 3%
  - Sep-20: 5%
  - Jun-20: 5%
  - Apr-20: 4%

57% would wait two months or less to travel again.

*Numbers may not always add up due to rounding. Q12. Once the pandemic has been contained, how long would you wait, if at all, to return to your usual travel plans? *Note that the wording of this question has changed slightly since it was asked in the April 2020 wave of this survey.
Encouraging travel trends, but some headwinds

84% of people won’t travel if there is a chance of quarantine

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree strongly</th>
<th>Agree somewhat</th>
<th>2020 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will not travel if there is a chance I may be quarantined at my destination</td>
<td>48%</td>
<td>36%</td>
<td>84%</td>
</tr>
<tr>
<td>Quarantine is not necessary if a person has been vaccinated for COVID-19</td>
<td>27%</td>
<td>39%</td>
<td>66%</td>
</tr>
<tr>
<td>Quarantine is not necessary if a person tests negative for COVID-19</td>
<td>26%</td>
<td>39%</td>
<td>65%</td>
</tr>
<tr>
<td>Once the pandemic has been contained, I will travel by air to see family/friends ASAP</td>
<td>32%</td>
<td>40%</td>
<td>72%</td>
</tr>
<tr>
<td>I will postpone air travel until the economy stabilizes</td>
<td>23%</td>
<td>39%</td>
<td>62%</td>
</tr>
<tr>
<td>Having been vaccinated will make me more likely to travel by air</td>
<td>20%</td>
<td>36%</td>
<td>56%</td>
</tr>
<tr>
<td>Having been vaccinated will make me more likely to travel by air</td>
<td>39%</td>
<td>42%</td>
<td>81%</td>
</tr>
</tbody>
</table>

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Q14. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

Q13. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

Q22. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?
Travel Health Credentials: travelers want an app

4/5 would use an app as soon as available but only if they control their own data.

**Opinions About Mobile Application**

- Governments must standardize vaccinations/testing certifications so everyone plays by the same rules: 89%
- I support a secure system to manage health credentials without fraud: 84%
- I want a system that is integrated into the app from my airline that I am already using: 80%
- I am encouraged by this prospect and will use it as soon as it is available: 80%
- I will only use an app if I have full control of my vaccine/test data: 78%
- I trust the airlines to manage the process of protecting my data: 77%
- I will not use an app if my vaccine/test data is stored in a central data base: 59%

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Q30. It appears likely that COVID-19 tests or proof of COVID-19 vaccination could be required to facilitate future travel. Many companies are developing mobile phone applications to help the airline industry and other businesses efficiently manage these potential requirements. With that in mind, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?
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