

**IATA
GLOBAL
MEDIA DAYS**



Latest Travel Trends

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Director General

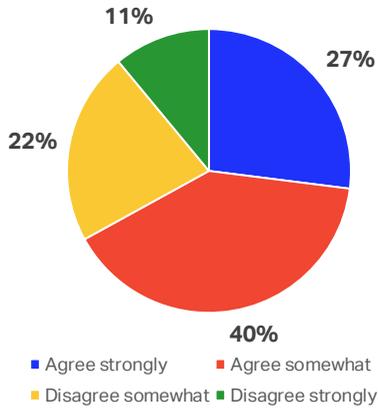
7 and 8 July 2021

#IATAMediaDays

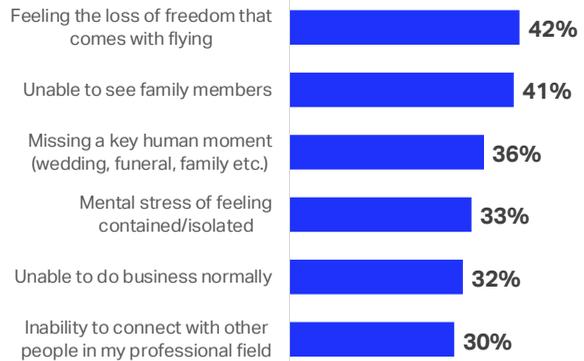


Travel restrictions hurting quality of life

Quality of life has suffered as a result of travel restrictions



Personal impact of COVID-19 travel restrictions (select all that apply)



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Q28. Which of the following impacted you personally as a result of COVID-19 travel restrictions?
Q26. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

First point is that people miss travel.

Two thirds say that travel restrictions are hurting their quality of life

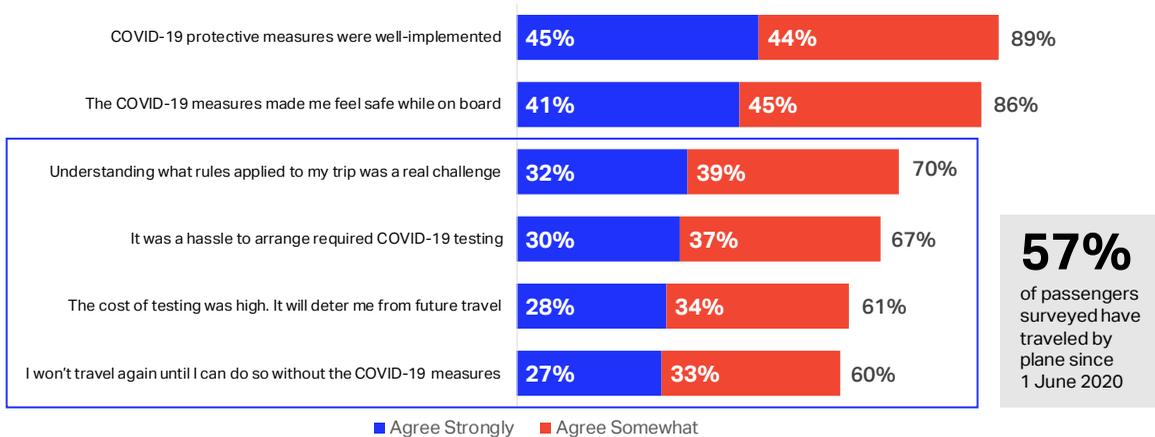
And this is for a variety of reasons

- Personal...unable to see family, join important life events
- Business....unable to work normally or make professional connections

Of course the airlines want to get back to business...because it is our business

- And this data tells us that this is also vitally important for the people who travel...over 4 billion in a normal year

Recent travelers **positive on safety measures, but see barriers**



57%
of passengers surveyed have traveled by plane since 1 June 2020



Q2. Have you taken any airplane trips since June 1st, 2020? [IF YES IN Q2] Q3. When thinking about your most recent airplane trip, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

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Second point is that the people who have travelled since the COVID measures were put in place (1 June 2020) felt safe

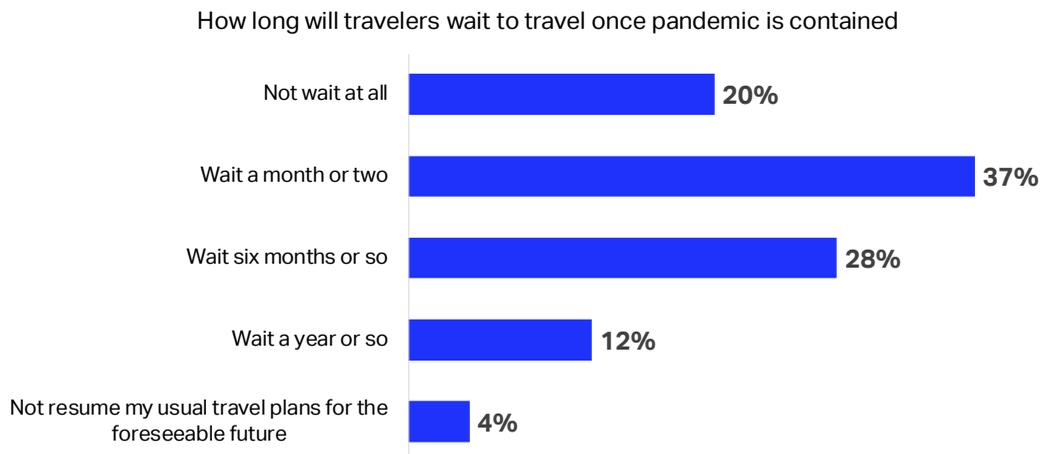
Almost 90% thought the measures were well implemented and made them feel secure

BUT...they also saw barriers

- 70% thought the rules were a challenge to understand
- 67% saw testing as a hassle
- 61% thought the cost of testing was a deterrent
- And 60% don't want to travel until they can do so normally

This sentiment aligns with our calls for governments to provide affordable testing, harmonize rules, and ensure that the measures not become permanent

Two thirds planning an early return to travel



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.

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We are confident that people will return to travel

Almost two thirds would do so within a few months of the pandemic being contained (and borders opened)

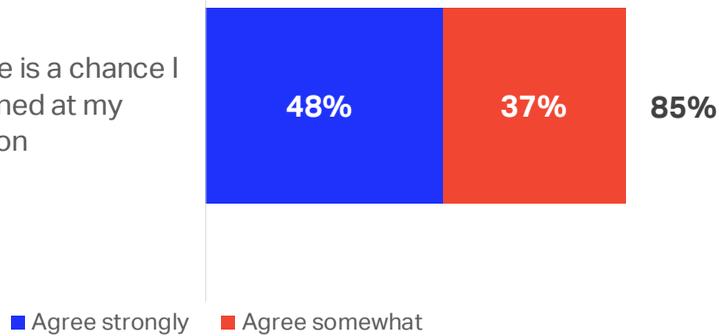
- And by the 6-month mark about 85% expect to be back to travel

That is good news...but it emphasizes why we need governments to plan ahead

- So that we can be prepared...and avoid the schedule chaos that we have seen in the US recently

Majority won't travel if there's a chance of quarantine

I will not travel if there is a chance I may be quarantined at my destination



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NB Numbers may not always add up due to rounding.
Q13. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with the following statement?



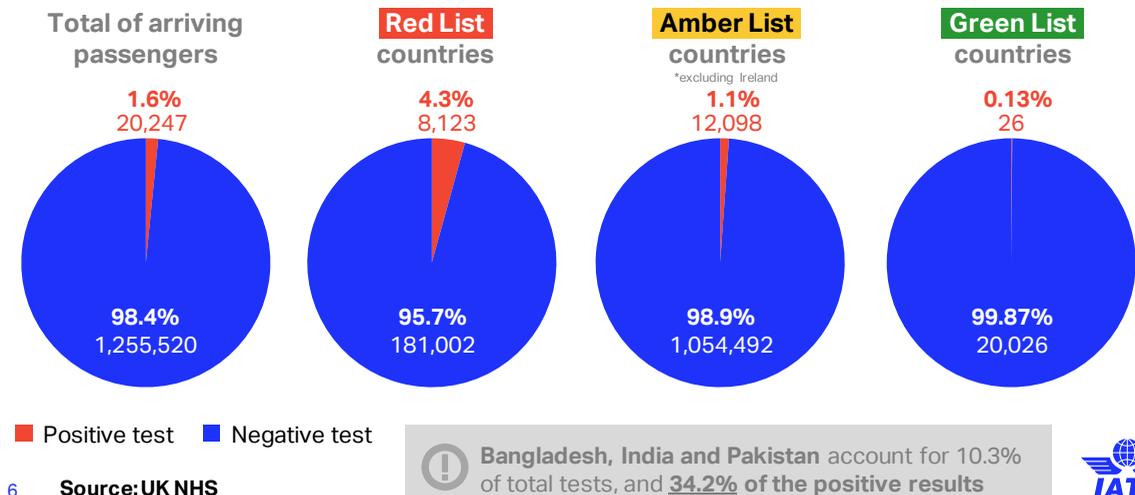
Quarantine is the big show-stopper

85% won't travel if it requires quarantine at destination

We need to find alternatives

Vast majority of int'l. arrivals pose no COVID-19 risk

1,275,767 tests conducted after arrival to the UK (25 February – 9 June 2021)



Data tells us that we should be looking at more targeted activities

UK data for arrival testing shows that the vast majority of travelers pose no risk of COVID-19

- 1.3m million tests and only 20,000 positive results (1.6%) since the end of Feb.

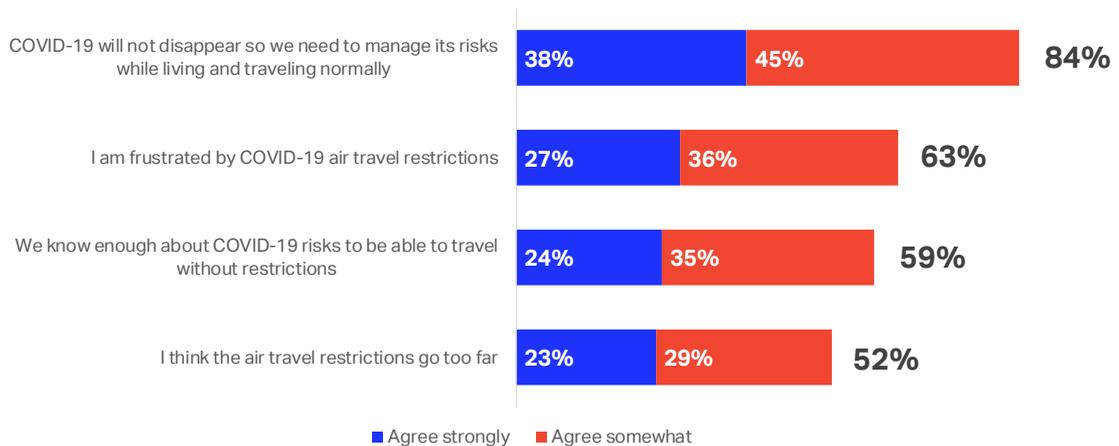
Being smart about applying quarantine only to those countries with large outbreaks (red list in the case of the UK)...would make much more sense

- Red list has positivity 4x Amber (10% of tests but 34% of positive results) so you would expect differentiation—what we would call risk management

Governments need to establish a risk threshold...and open up travel accordingly

- We can manage withing a threshold using modelling
- Airbus and Boeing have done good work in this area
- And that will enable people can get back to work, families can reunite
- And we can keep the health care system safe from being over-burdened

Frustration with continued travel restrictions



NB Numbers may not always add up due to rounding.

Q24. When it comes to the COVID-19-related air travel restrictions in your country, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following?



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The general public is developing an appetite from risk

About 85% say that we need to manage the risks of COVID so we can get on with our lives...including travel

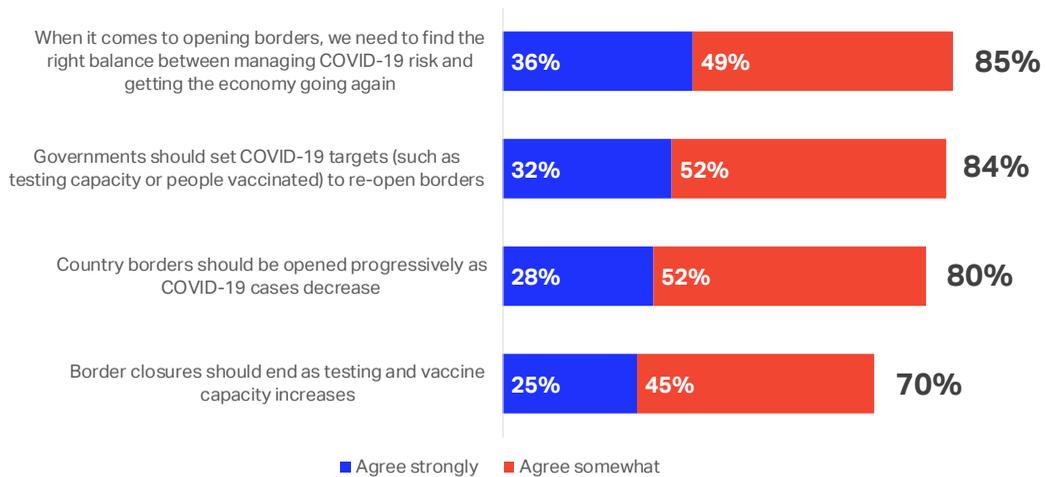
They understand that COVID will be with us for some time to come

And they feel frustrated with the restrictions (63%)

They believe that we have enough information about travel to travel without restrictions (59%)

And about half feel that the current restrictions go to far

Setting targets and planning to re-open borders



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NB Numbers may not always add up due to rounding.

Q26. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?



Alleviating the frustrations with restrictions can and should be done in an orderly manner

Points to our position that governments need to do more effective risk management and advance planning

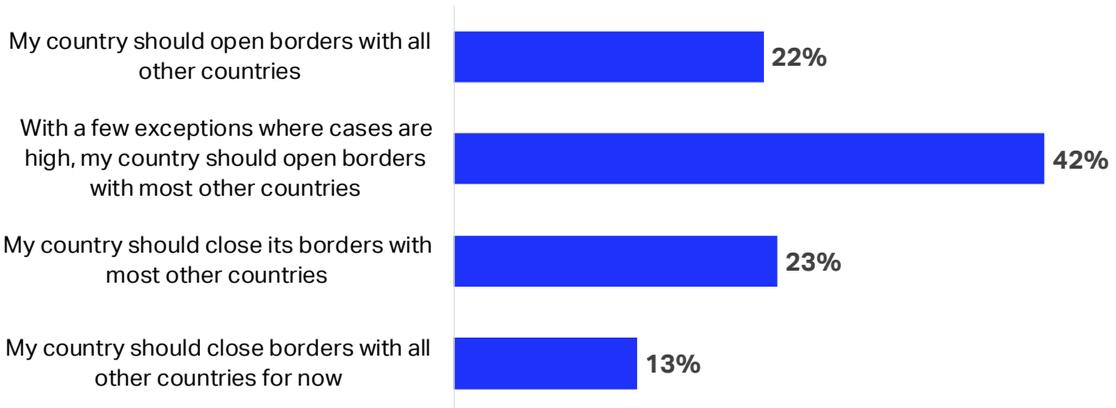
While the public sees a role for travel restrictions in the pandemic, they want these removed as the situation improves

This series of answers shows that people want borders opened

- In line with a plan that manages risks and gets the economy moving again
- Guided by targets on testing and vaccination capacities

This is the way that we manage all societal risks...including everyday things like speed limits and alcohol consumption

Two thirds support border re-opening



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Q27A. Which one of the following best reflects your opinion about what your country should do now with respect to borders with other countries?



And people believe that the time to open borders is here

22% believe that their country should be open to all without restriction, and a further 42% believe their country should be open with very limited restrictions

Of course, you don't run a country on opinion polls

But as vaccinations increase and we have more confidence in testing, the science points us towards risk management

And leaders should recognize that their citizens are ready and supportive of reopening policies

Our vision for reopening borders has three key points

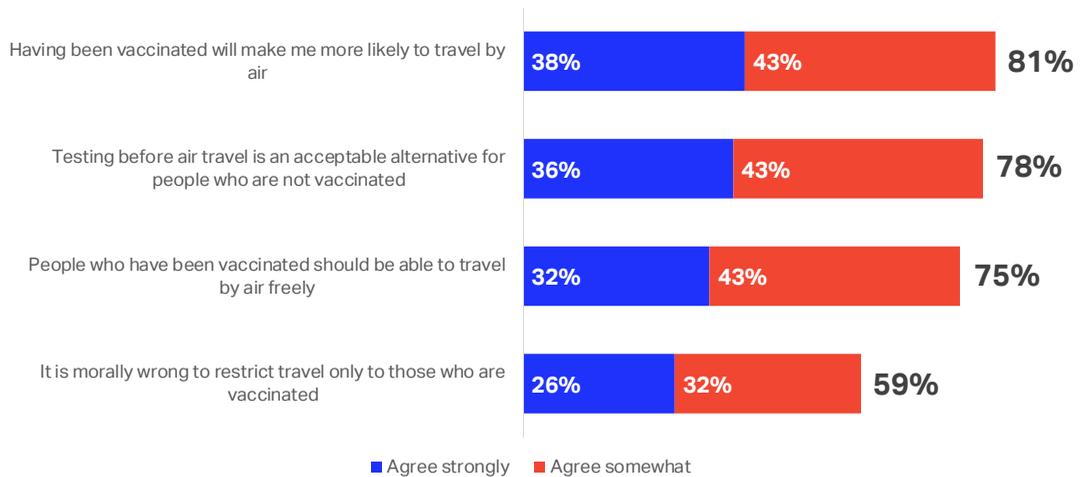
Vaccinated people should be able to travel freely

Unvaccinated people can have access to travel through testing or proof of prior infection

And we should manage the process with digital certifications

Let's see what the public said about that...

Vaccination a key to re-opening travel



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NB Numbers may not always add up due to rounding.
Q22. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?



People agree that vaccinations is a key to re-opening travel

81% believe that being vaccinated will make them more likely to travel

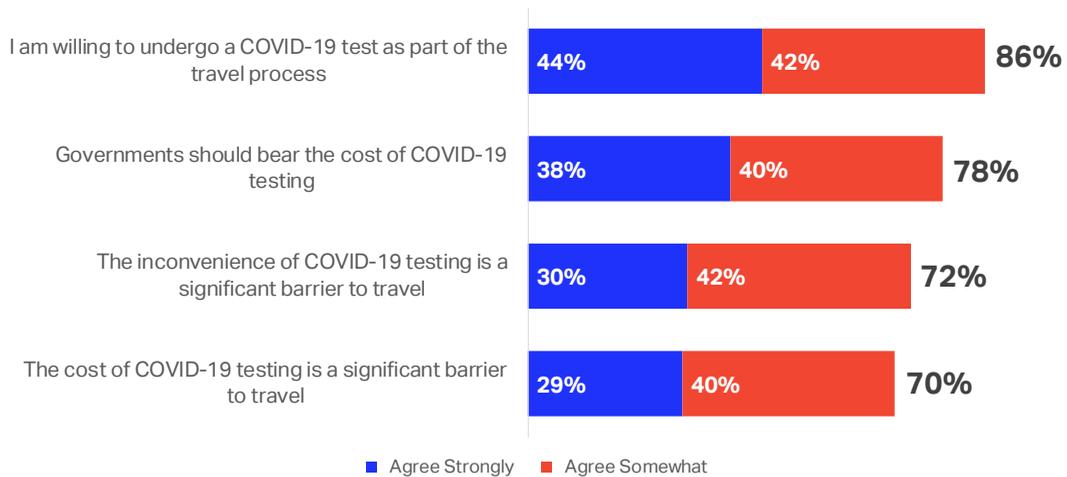
75% believe that vaccinated people should not have any barriers to travel

And they understand that we need alternatives for those who cannot be vaccinated

About 60% say that restricting travel to those who are vaccinated is morally wrong, and

78% believe that testing is a good alternative

Willing to test but **cost and inconvenience** are barriers



NB Numbers may not always add up due to rounding.

Q19. How strongly do you agree or disagree with the following statements about COVID-19 testing as part of the travel process. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly?



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We see support for our position on testing as well

86% are willing to be tested to travel

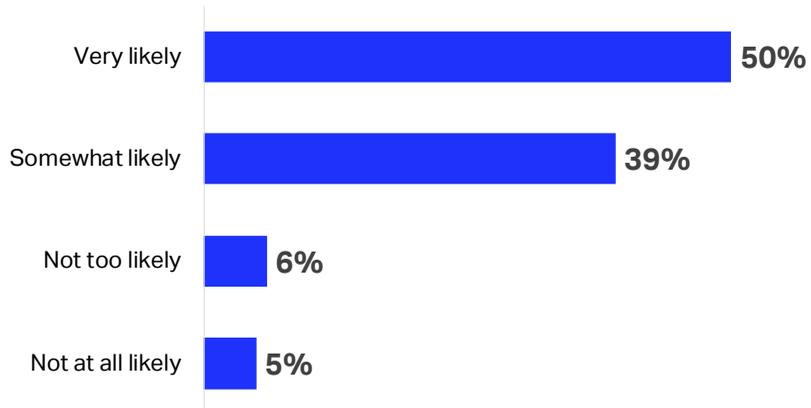
Despite this support they see some hurdles that need to be overcome—cost and inconvenience

They key here is for governments to bear the cost of testing

- As is the policy of the WHO's International Health Regulations
- **And with 72% saying that the inconvenience is a significant barrier to travel**
- We need to make sure that these are temporary measures

Majority would use an app for travel/health credentials

Likelihood of Using Mobile App To Store Health Credentials



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Q30B. If a mobile app could store your travel credentials for health (COVID-19 test or vaccination status), how likely would you be to use it?



The point is that people expect a digital system to manage their travel credentials
Half would be very likely to use an app for this...and an additional 39% would be somewhat likely

From the airline perspective, this is critical

- Airports and processes are built on automated systems....we will have chaos if we have to send everybody back to the check-in country for manual checking of COVID documentation

This is why our IATA Travel Pass program is so important...

Hand over to Nick for his presentation