Latest Travel Trends

Willie Walsh
Director General
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**

| Statement                                                                 | Agree Strongly | Agree Somewhat | Total
|---------------------------------------------------------------------------|----------------|----------------|-------
| COVID-19 protective measures were well-implemented                         | 45%            | 44%            | 89%   |
| The COVID-19 measures made me feel safe while on board                     | 41%            | 45%            | 86%   |
| Understanding what rules applied to my trip was a real challenge            | 32%            | 39%            | 70%   |
| It was a hassle to arrange required COVID-19 testing                       | 30%            | 37%            | 67%   |
| The cost of testing was high. It will deter me from future travel          | 28%            | 34%            | 61%   |
| I won’t travel again until I can do so without the COVID-19 measures       | 27%            | 33%            | 60%   |

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

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

How long will travelers wait to travel once pandemic is contained

- Not wait at all: 20%
- Wait a month or two: 37%
- Wait six months or so: 28%
- Wait a year or so: 12%
- Not resume my usual travel plans for the foreseeable future: 4%

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 the survey.

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

- **85%** won’t travel if it requires quarantine at destination
- We need to find alternatives

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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
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)

<table>
<thead>
<tr>
<th>Category</th>
<th>Positive test</th>
<th>Negative test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red List countries</td>
<td>4.3%</td>
<td>95.7%</td>
</tr>
<tr>
<td>Amber List countries</td>
<td>1.1%</td>
<td>98.9%</td>
</tr>
<tr>
<td>Green List countries</td>
<td>0.13%</td>
<td>99.87%</td>
</tr>
<tr>
<td>Total of arriving</td>
<td>1.6%</td>
<td>98.4%</td>
</tr>
<tr>
<td>passengers</td>
<td>20,247</td>
<td>1,255,520</td>
</tr>
</tbody>
</table>

Source: UK NHS

Bangladesh, India and Pakistan account for 10.3% of total tests, and 34.2% of the positive results

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 within 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**

- COVID-19 will not disappear so we need to manage its risks while living and traveling normally: 38% agree strongly, 45% agree somewhat, 27% disagree somewhat, 24% disagree strongly.
- I am frustrated by COVID-19 air travel restrictions: 27% agree strongly, 36% agree somewhat, 39% disagree somewhat, 29% disagree strongly.
- We know enough about COVID-19 risks to be able to travel without restrictions: 24% agree strongly, 35% agree somewhat, 36% disagree somewhat, 45% disagree strongly.
- I think the air travel restrictions go too far: 23% agree strongly, 29% agree somewhat, 36% disagree somewhat, 45% disagree strongly.

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 too far.
### Setting targets and planning to re-open borders

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree strongly</th>
<th>Agree somewhat</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>When it comes to opening borders, we need to find the right balance between managing COVID-19 risk and getting the economy going again</td>
<td>36%</td>
<td>49%</td>
<td>85%</td>
</tr>
<tr>
<td>Governments should set COVID-19 targets (such as testing capacity or people vaccinated) to re-open borders</td>
<td>32%</td>
<td>52%</td>
<td>84%</td>
</tr>
<tr>
<td>Country borders should be opened progressively as COVID-19 cases decrease</td>
<td>28%</td>
<td>52%</td>
<td>80%</td>
</tr>
<tr>
<td>Border closures should end as testing and vaccination capacity increases</td>
<td>25%</td>
<td>45%</td>
<td>70%</td>
</tr>
</tbody>
</table>

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**

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree strongly</th>
<th>Agree somewhat</th>
<th>Total Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having been vaccinated will make me more likely to travel by air</td>
<td>38%</td>
<td>43%</td>
<td>81%</td>
</tr>
<tr>
<td>Testing before air travel is an acceptable alternative for people who are not vaccinated</td>
<td>36%</td>
<td>43%</td>
<td>78%</td>
</tr>
<tr>
<td>People who have been vaccinated should be able to travel by air freely</td>
<td>32%</td>
<td>43%</td>
<td>75%</td>
</tr>
<tr>
<td>It is morally wrong to restrict travel only to those who are vaccinated</td>
<td>26%</td>
<td>32%</td>
<td>59%</td>
</tr>
</tbody>
</table>

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?

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**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
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

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.