

Travel Concerns During Covid-19: Airline Industry Analysis

Table of Contents

Background and Methodology	3
Key Findings	5
Detailed Results	7
Demographics	14

1

Background & Methodology

Background & Methodology

The project was conducted to investigate how leisure travelers view airline travel during the Covid-19 pandemic.

Total n=1573

- 18 years old or older
- US resident
- Flown for leisure in the last 12 months

The study fielded from 7/31 – 8/6/20

We implemented quotas on demographics to achieve the following distribution:

- Age – minimum of 200n for each:
 - 18-34 years old
 - 35-54 years old
 - 55+ years old
- Gender – minimum 500 for each:
 - Male
 - Female
- Product use – 200n for each:
 - Low frequency = 0-2 flights in last 12 months
 - Medium frequency = 3-7 flights in last 12 months
 - High frequency = 8 or more flights in last 12 months



2

Key Findings

Key Findings



Concern about Covid-19 is high in general, with 70% extremely or very concerned about the pandemic and 76% very or somewhat concerned about exposure. The most common ways respondents have been affected is through restriction of their movements (41%) or working from home (34%).



Nearly half (48%) say that they are somewhat or very likely to travel by air in the next six months. Despite this high likelihood to travel by air, 71% are very or somewhat concerned about Covid-19 exposure in the airport and the same number are concerned about exposure onboard. Most important to respondents is passenger mask requirements (44%) and enhanced cleaning procedures (35%)



Respondents are most concerned about exposure on head/arm/leg rests (38%), tray tables (36%), lavatories (35%), and air filtration systems (35%). Perhaps related to these areas of transmission, they are most interested in receiving information from airlines about aircraft/airport cleaning, social distancing (32%), and information on how to fly healthy (32%).



Although a plurality of respondents (36%) do not have an opinion on which airline has been communicating the best about Covid-19, they would like to receive information from airlines once a month (39%) but once a week (43%) prior to a trip.

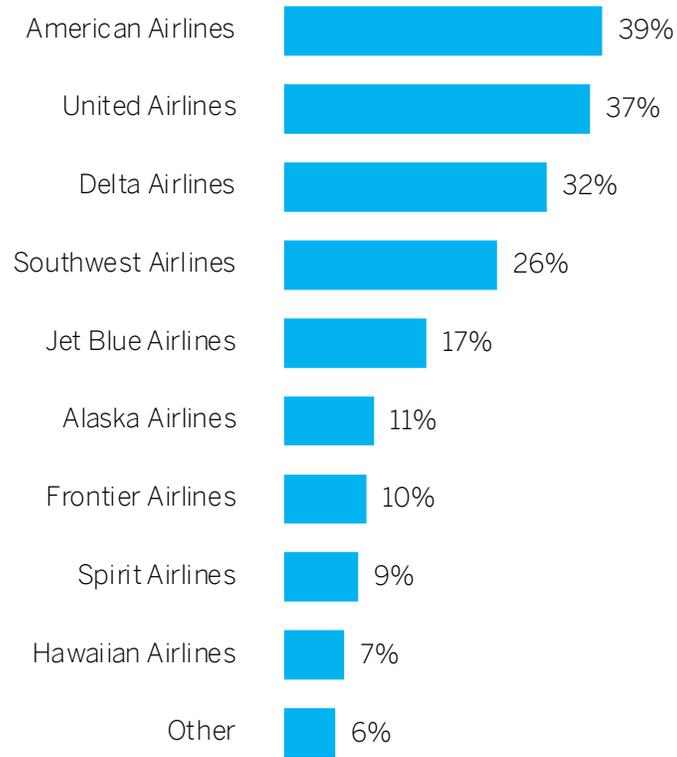
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Detailed Results

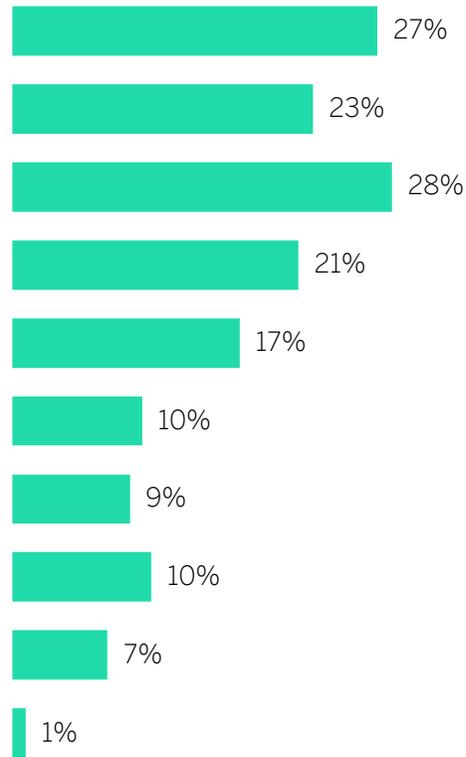
Airline Usage

American and United were the airlines most used in the past 12 months. Along with Delta, they are also the most frequently used and subscribed to frequent flyer programs.

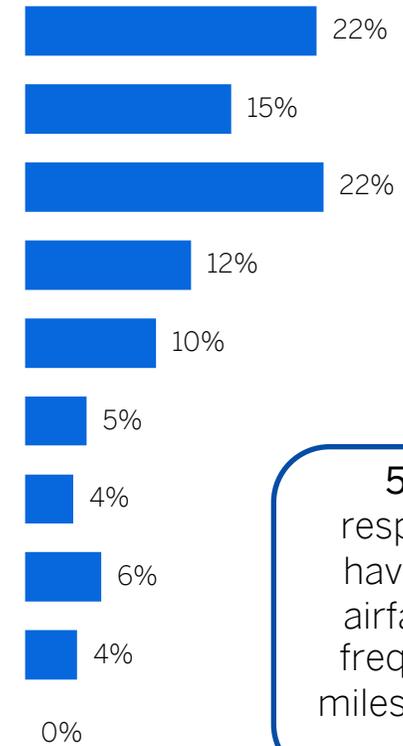
Airline Used in Past 12 Months



Frequent Flier Programs



Most Used Frequent Flier Program



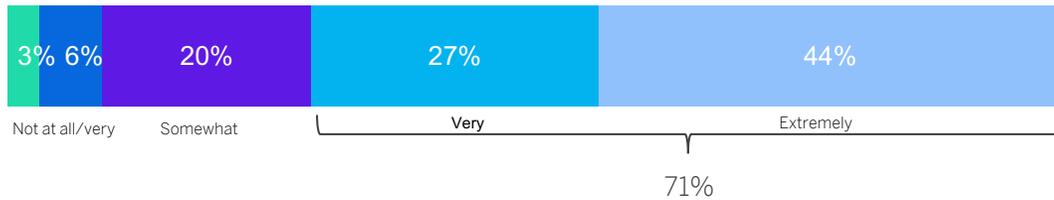
54% of respondents have bought airfare using frequent flier miles in the last year

Q1.4 Which airlines have you used for round-trip flights in the past 12 months? N=1573
 Q1.5 Which airline frequent flier programs, if any, do you belong to? N=1573
 Q1.6 Which of the following airline frequent flier programs do you use the most often? N=1573
 Q1.7 Have you purchased airfare using frequent flier miles in the past 12 months? N=1573

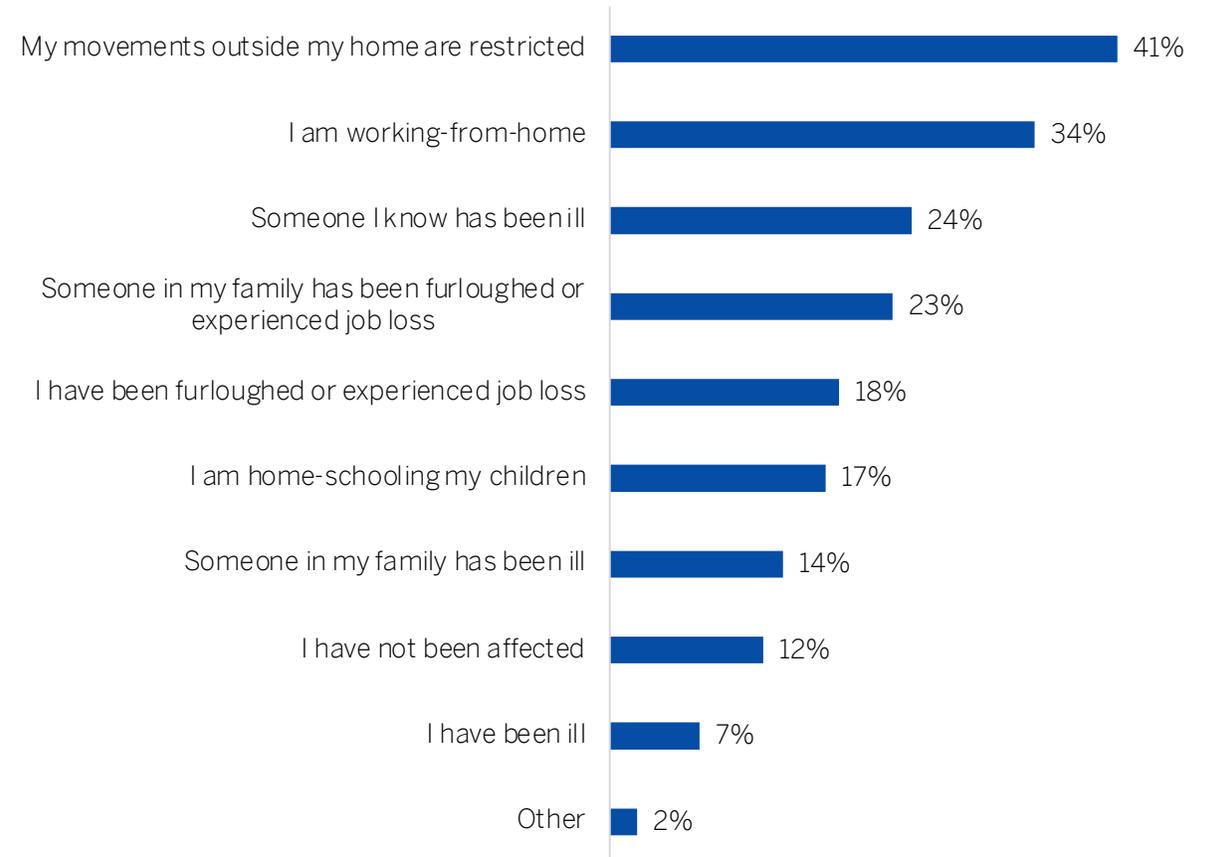
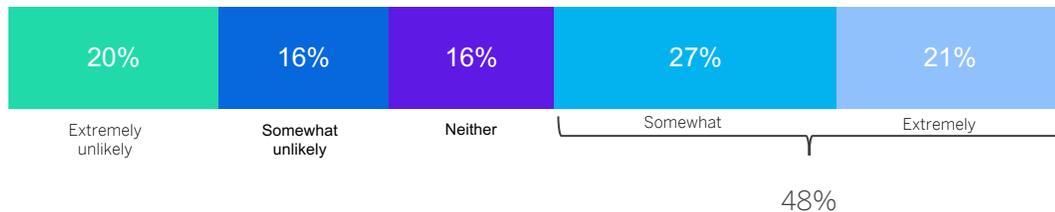
Covid-19 Changes

7 in 10 respondents report being very or extremely concerned about the Covid-19 pandemic. The most common ways to be affected are through having movements restricted and working from home. Despite these concerns, nearly half (48%) are very or somewhat likely to travel by air in the next 6 months.

In general, how concerned are you about the Covid-19 pandemic?



How likely are you to travel by air in the next 6 months?



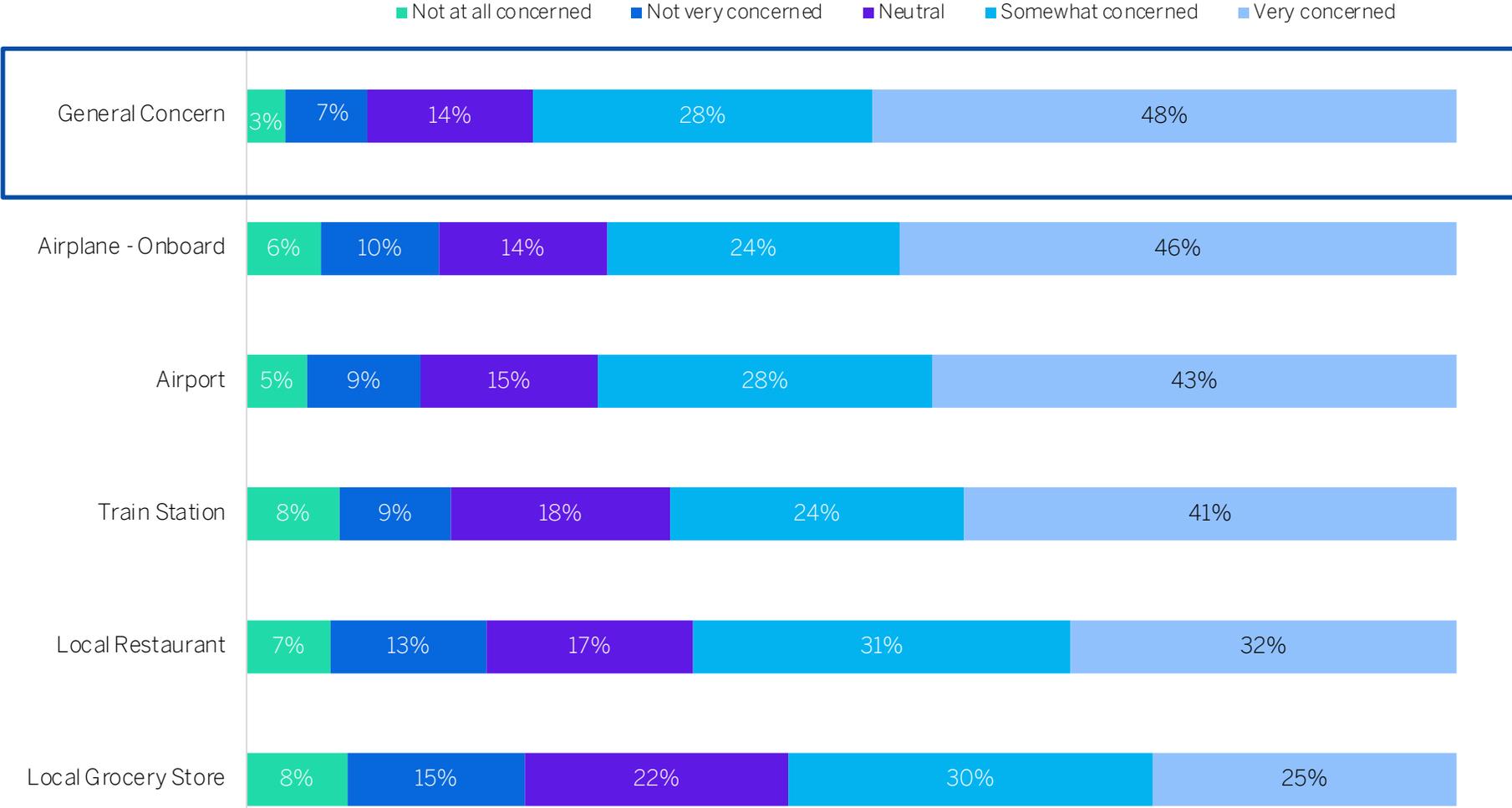
Q2.1. In general, how concerned are you about the Covid-19 pandemic? N=1573

Q3.2 How likely are you to travel by air in the next 6 months? N=1573

Q2.2 In which of the following ways, if any, have you been affected by the Covid-19 pandemic? N=1573

Covid-19 Exposure Concern

About half of respondents are generally very concerned about Covid-19 exposure, while 46% are concerned about exposure onboard an airplane.

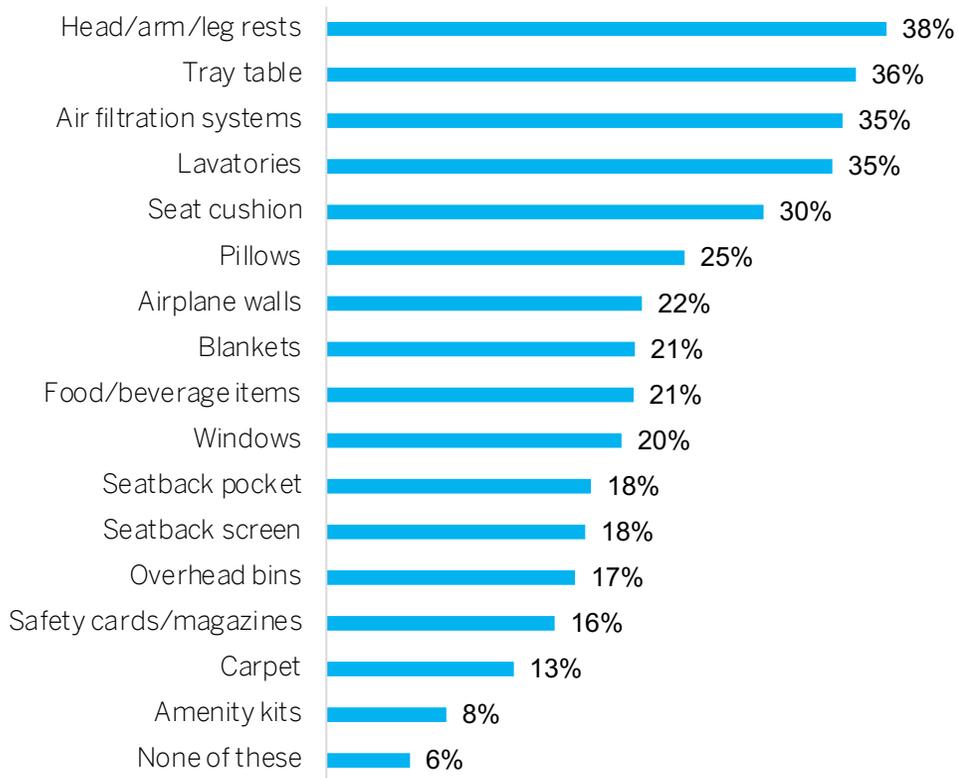


Q3.3 Overall, how concerned are you about Covid-19 exposure? N=1573
 Q3.4 How concerned are you about Covid-19 exposure in the following locations? N =1573

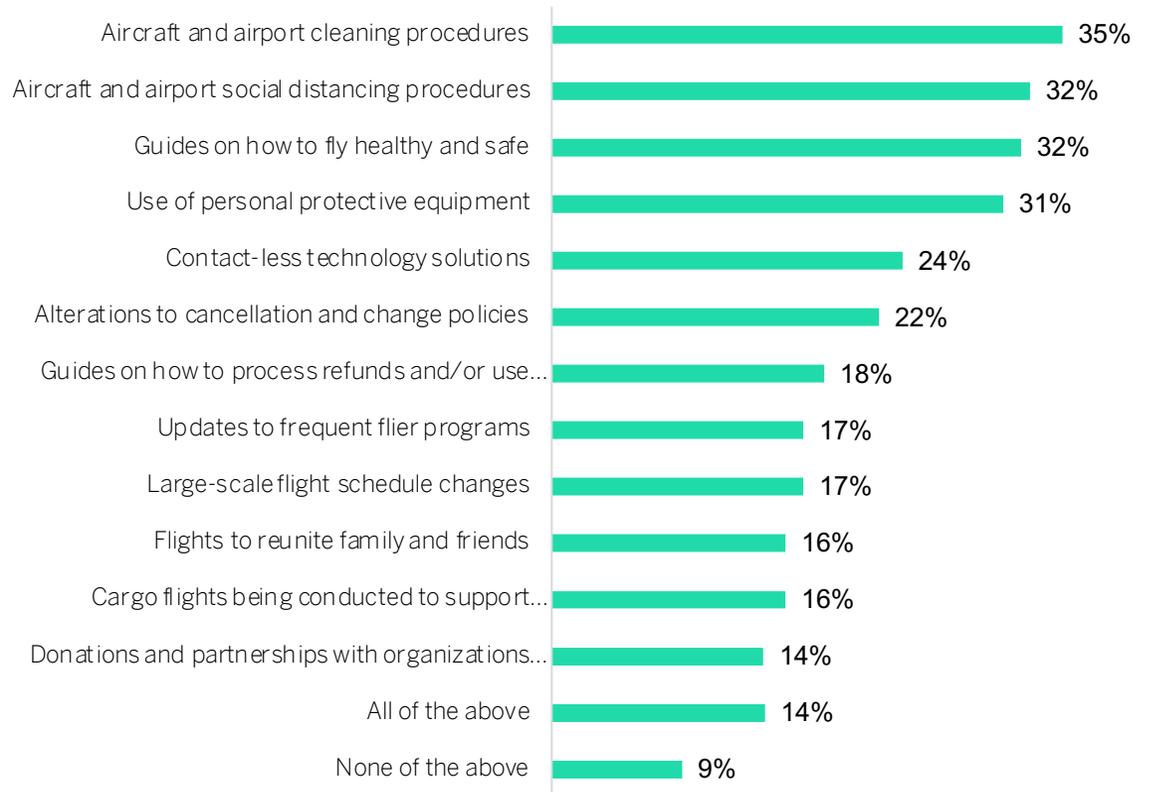
Areas of Exposure and Communication

Respondents are most concerned about being exposed by the head/arm/or leg rests or by the tray tables. They are most likely to want information about cleaning procedures on airplanes.

Areas of Most Concern for Exposure



Areas of Communication

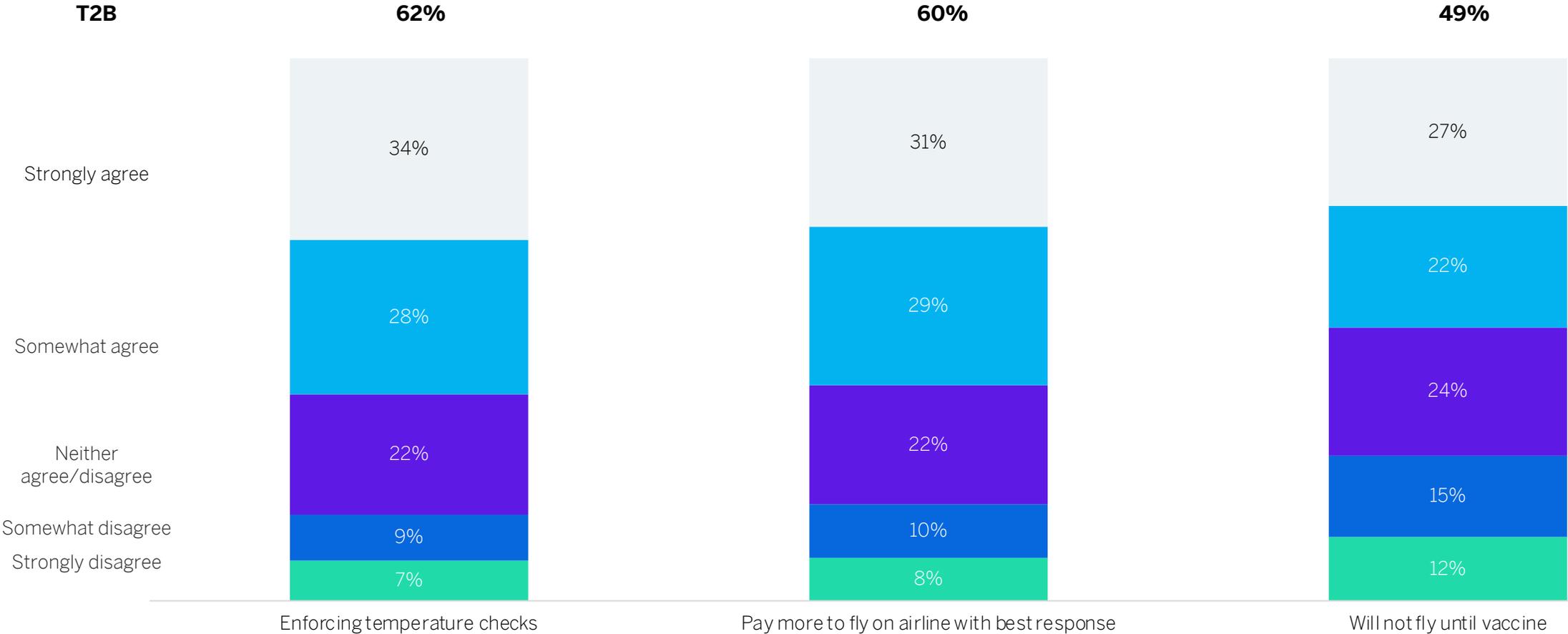


Q3.6 For which of the following aircraft areas are you most concerned about the potential for Covid-19 exposure? N=1573

Q3.7 What content areas are you interested in receiving communications from airlines about their handling of Covid-19? N=1573

Flying During Covid-19

Respondents are in favor of airlines enforcing temperature checks, and three in ten are willing to pay more to fly on an airline with the best Covid-19 response.

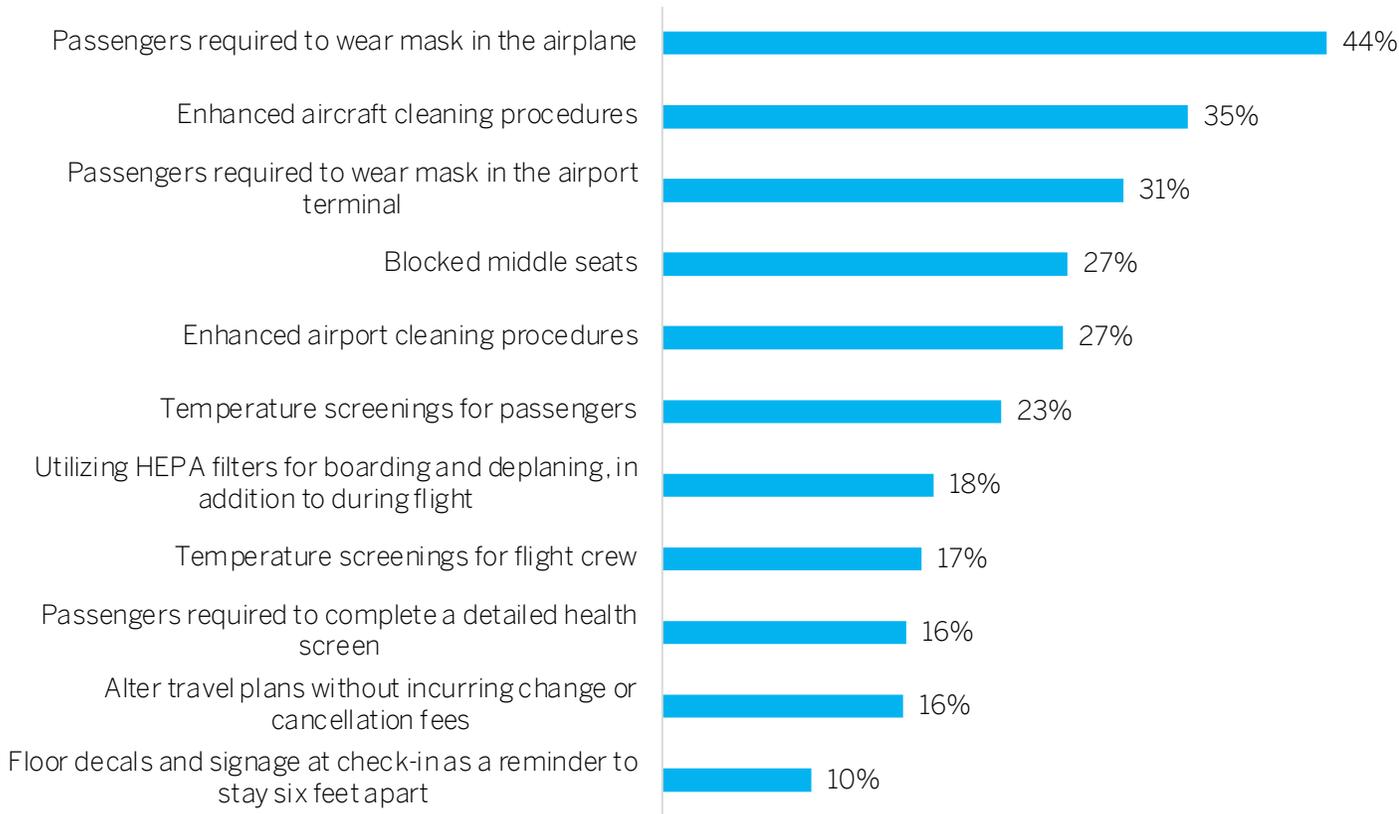


Q3.8. To what extent do you agree with the following statements? N=1573

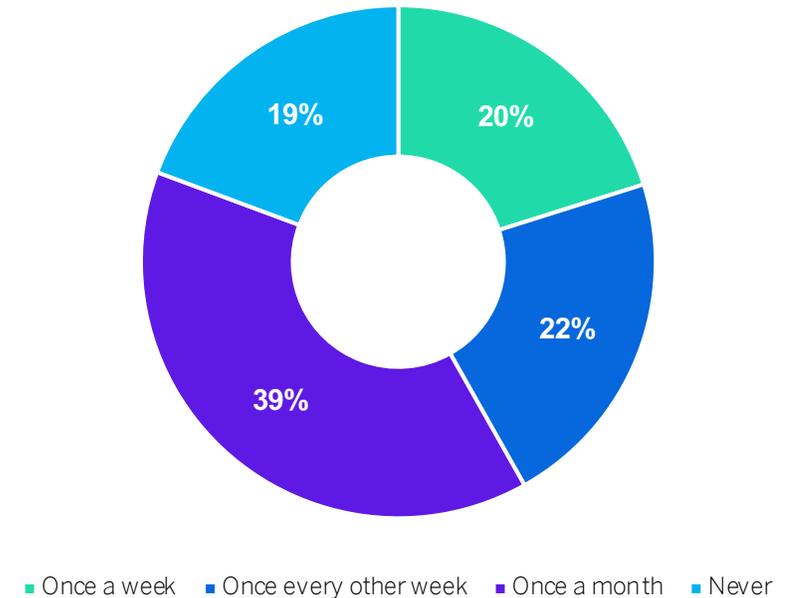
Most Important Policies

Respondents would like to see mask requirements for passengers as well as enhanced cleaning procedures. Monthly or bi-weekly communication from the airline is expected.

Airline Policies Most Important



Communication Expected



43% expect communication weekly prior to a trip

Q6.1. Please select the airline policies most important to you during this time. N=1573

Q4.3 How often do you expect communication from an airline overall? N=1573

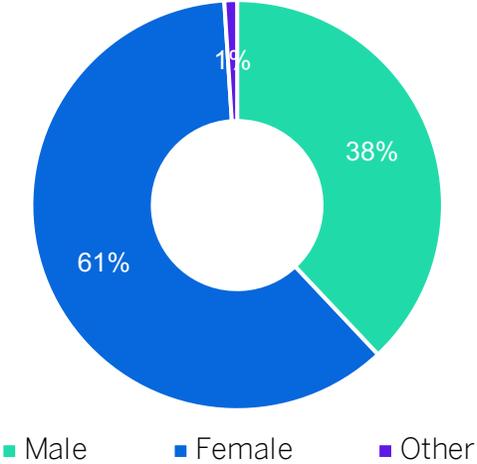
Q4.4 How much communication to you expect prior to your trip? N=1573

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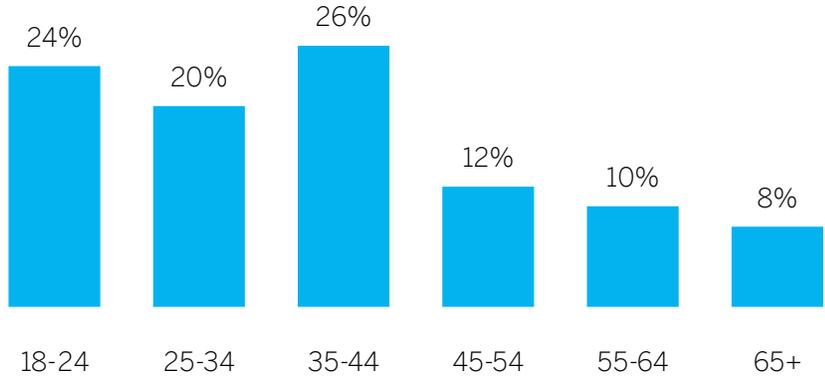
Demographics

Demographics | Total

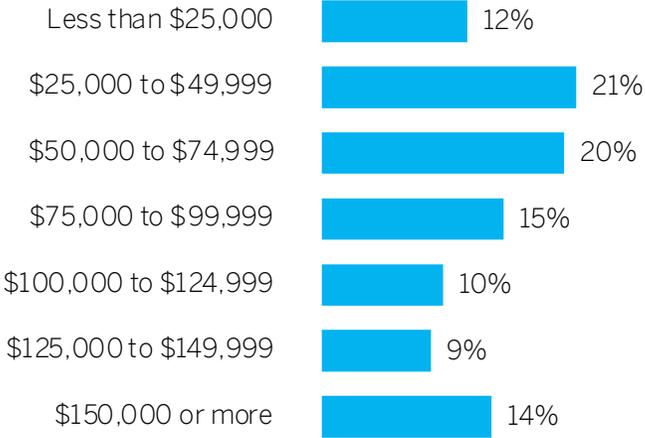
Gender



Age



Household Income



Education

