



Charting a Course into the Future

FlightPlan 2020 Aviation Industry Survey Results

FLIGHTPLAN
Charting a Course into the Future

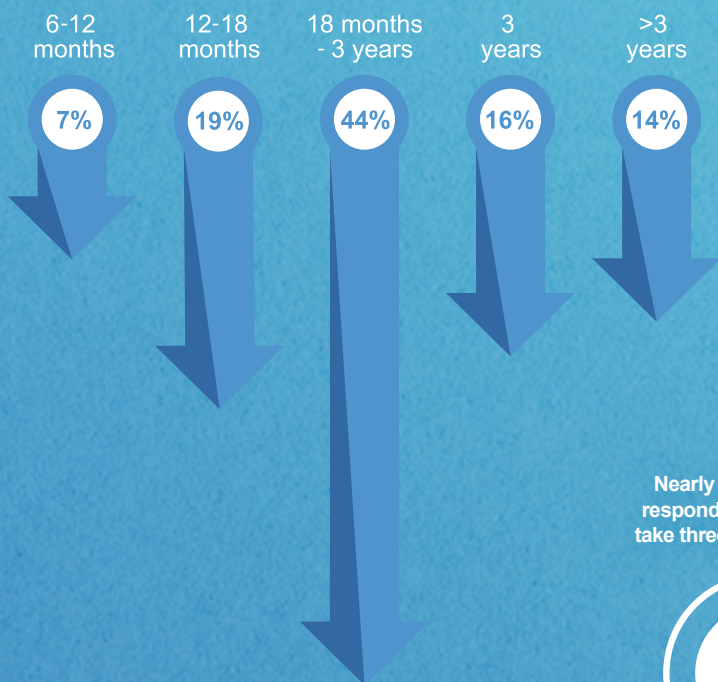
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AVIATION



FlightPlan was the first virtual thought leadership event of its kind, for the aviation industry, by the aviation industry. The survey provided an opportunity for your voices to be heard, and we had responses from industry professionals worldwide – from the full spectrum of the aviation supply chain.

The Impact of the Crisis

How long do you believe it will take the global airline industry to return to 2019 total revenue levels?



74%

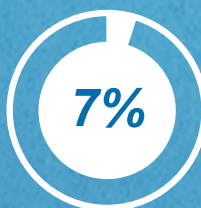
expect the industry to take over 18 months to recover from the COVID pandemic.

Nearly a third of these respondents predict it to take three years or longer.

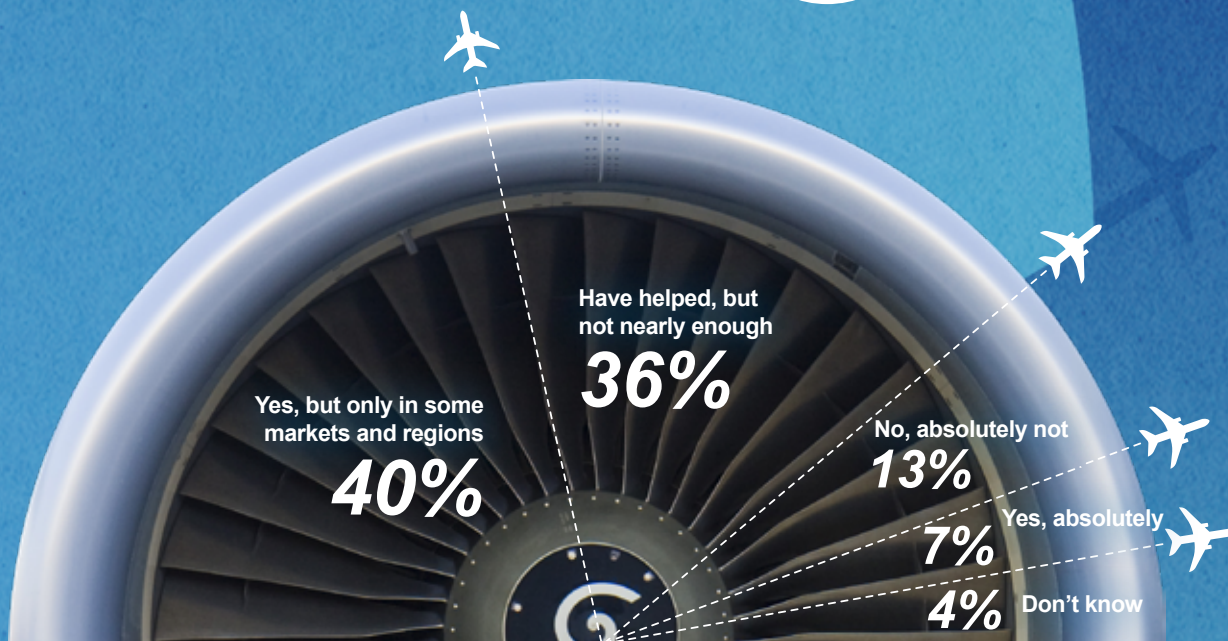


Have global governments done enough to support the aviation industry?

Despite bailouts from many governments, only 7% of respondents believe governments have uniformly done enough to support the industry.



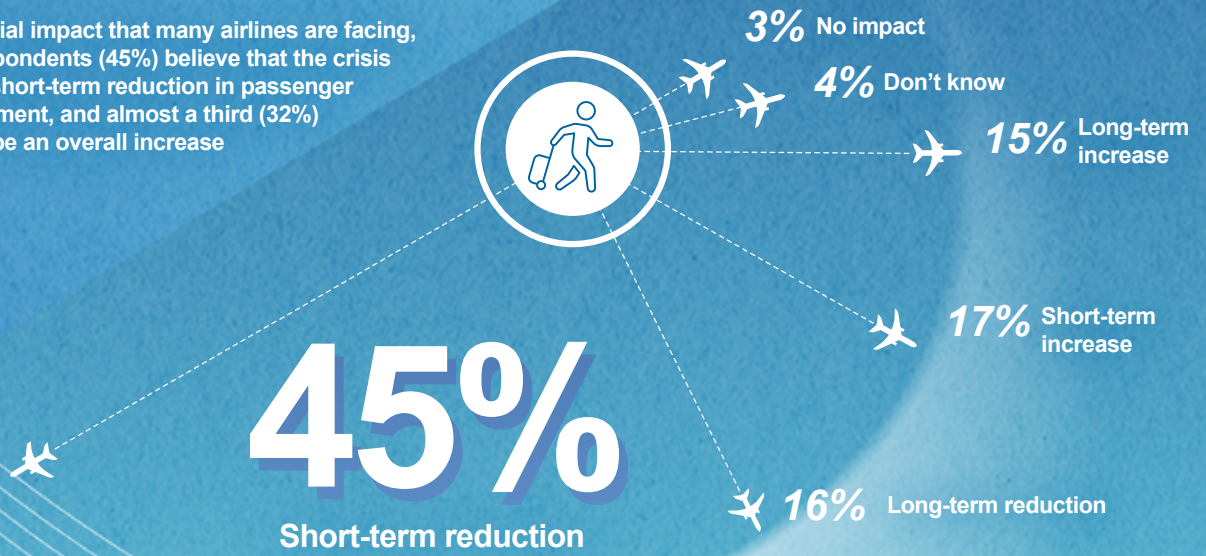
As little as 7% of respondents suggested the industry could recover in a year.



Impact on Passenger Experience

To what extent do you believe the current crisis will impact passenger service innovation?

Despite the financial impact that many airlines are facing, almost half of respondents (45%) believe that the crisis will only cause a short-term reduction in passenger experience investment, and almost a third (32%) believe there will be an overall increase in investment.



Which of these procedures do you predict will become part of the passenger journey over the coming months?



9 in 10 (88%) expect slower turnarounds, which could have a significant impact on flight schedules.

Impact on Sustainability

What impact do you believe the pandemic crisis will have on the aviation industry's path to sustainability?

With a global recession potentially threatening investment in green technology, there was little consensus in the poll about the impact of COVID-19 on aviation's path to sustainability, with 36% believing the crisis will accelerate progress and 47% thinking it will delay progress.

47%

Delay progress

36%

Accelerate progress

11%

little or no impact

6%

Don't know

Industry Recovery

What aspect of the aviation industry do you believe will recover fastest?

9 in 10

(85%) predict domestic travel to recover quicker than international travel.

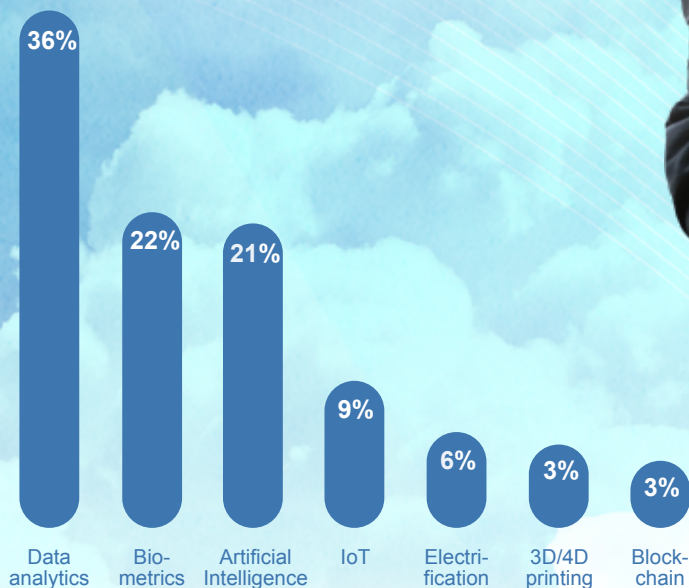
7 in 10

(70%) expect point-to-point travel to bounce back quicker than hub and spoke routes.

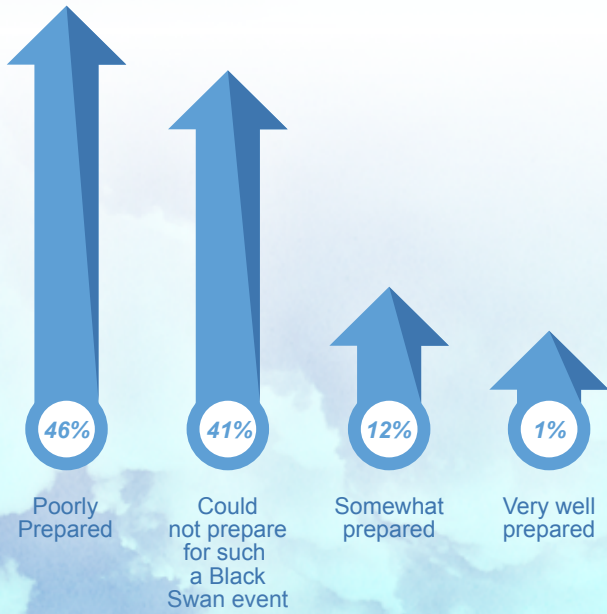


Whilst commentators initially suggested that the rise of remote working would be detrimental to business travel, 69% of respondents expect a swifter recovery for business travel than leisure travel.

Which of these core technologies do you believe will have the greatest influence on the airline industry's future profitable growth?



How well prepared do you believe the industry was for the COVID pandemic?



58%

believe the airline industry was somewhat, but mostly poorly prepared for the COVID pandemic.”

Will the airline industry survive the COVID crisis?

