

PASSENGER CONFIDENCE TRACKER

November 2020

BUILT TO FLY


inmarsat
AVIATION

FOREWORD

Resilience and innovation have been two of the key characteristics to shape commercial aviation's ongoing success story over the last century. And it's these attributes that have helped the industry come to terms with the events of 2020 and formulate strategies for its recovery.

No-one could have forecast COVID-19 and the extent to which this global pandemic would impact the aviation industry. Every one of us across our sector has been on a tumultuous journey this year, and while the industry is still in a hazardous place, those twin qualities of resilience and innovation stand us in great stead.

Difficult questions have been asked. Much has been learned – particularly as we discover how and why passenger habits and attitudes are changing. The ability of the industry to adapt and transform itself is already underway.

With that in mind, our Passenger Confidence Tracker, developed in collaboration with Yonder, is an invaluable tool for the industry. With close to 10,000 airline passengers from across the globe offering their thoughts on flying today, it is not only the largest survey of air passengers since COVID-19 struck, it also offers a priceless and detailed picture of changing passenger mindsets.

Understanding these opinions is critical for airlines. Until the industry understands passenger confidence, flyers won't be returning to the skies en masse. One of the key take outs from this comprehensive survey is that eight in ten air passengers say their travel habits will change forever because of COVID-19.

This is something the industry clearly needs to address. But it is also an opportunity. This year has changed aviation forever. Our report also suggests that the introduction of new technologies, particularly connected technologies, will be fundamental to assuaging passenger confidence when it comes to safety. Such moves will increase

airline reputation and, moreover, passenger numbers.

Aviation has faced moments of real crisis before – 9/11 and the financial crash are just two notable examples. In respectively adopting new concepts of security and business models the industry was changed forever. This time around, the resilience and adaptability we know the industry possesses can help usher in a new era of digital transformation.

To help that goal, the fascinating insights offered by our Passenger Confidence Tracker will help airlines understand their customers and their motivations better and subsequently underpin a sustainable and profitable recovery powered by technology.

Philip Balaam
President
Inmarsat Aviation



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BETTER INSIGHTS CAN SHOW THE WAY ON HOW TO REBUILD PASSENGER CONFIDENCE

It's said that to be forewarned is to be forearmed. That knowledge is power. These aphorisms are particularly useful when it comes to analysing the results of Inmarsat's Passenger Confidence Tracker and applying them to the state of the aviation industry in 2020.

In a year where the decimating effects of the coronavirus crisis have hit all industries, aviation has been impacted more than most. And so as the industry begins its path to recovery, the insights to be found in this comprehensive global survey – the largest of its kind since COVID-19 – will prove vital for aviation, especially when it comes to rebuilding passenger confidence.

The good news is that the data from our Passenger Confidence Tracker demonstrates there are a number of ways airlines can allay passenger concerns and get them back in the sky. By understanding people's perceptions and beliefs, the survey offers airlines various opportunities to meet flyers' expectations, increase their confidence and subsequently encourage the recovery of the industry.

The passenger is at the heart of every journey

By cutting the data in a variety of ways – for example by country, gender, age and traveller type – one of the most significant results is that not everyone has experienced the events of 2020 in the same way.

Travel anxiety appears higher among Asian passengers for instance, with 58% of respondents in India and 55% in South Korea planning to travel less in the future. Additionally, older passengers – those over 65 – are three times (24%) more likely to wait until there's a vaccine before flying again than those aged 25-34 (8%).

By examining different responses we can also identify that the more someone has flown in the past, the fewer barriers they have to overcome when it comes to returning to the skies. For instance, business travellers and frequent flyers report higher levels of confidence along the entire passenger journey than those who only flew short haul in 2019.

The lessons are clear then – airlines have to take a passenger-centric approach in the future. There is no one-size-fits-all strategy for recovery. Different business models will need to adopt different methods to entice flyers back.

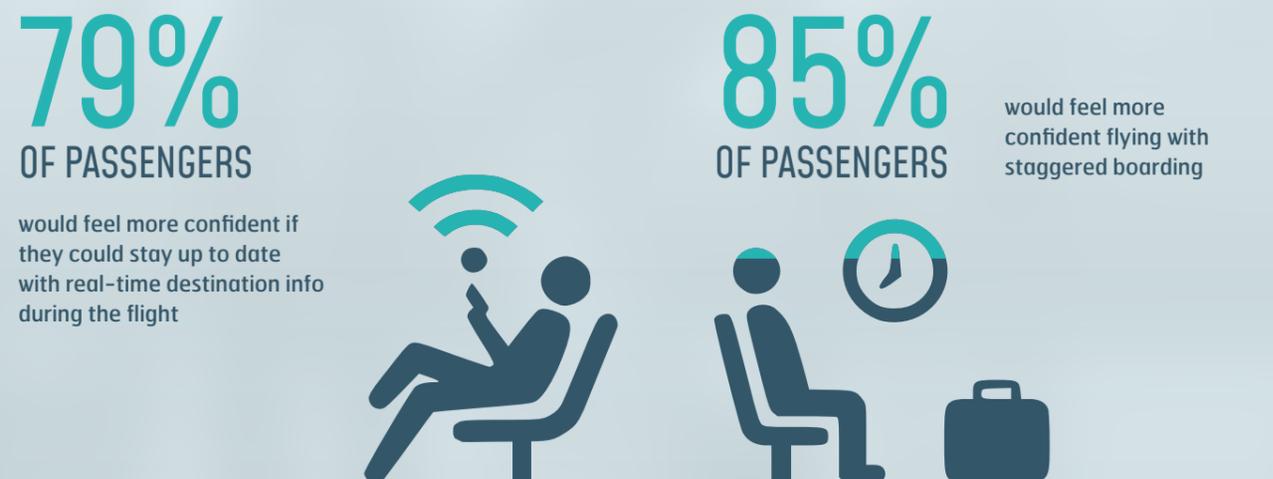
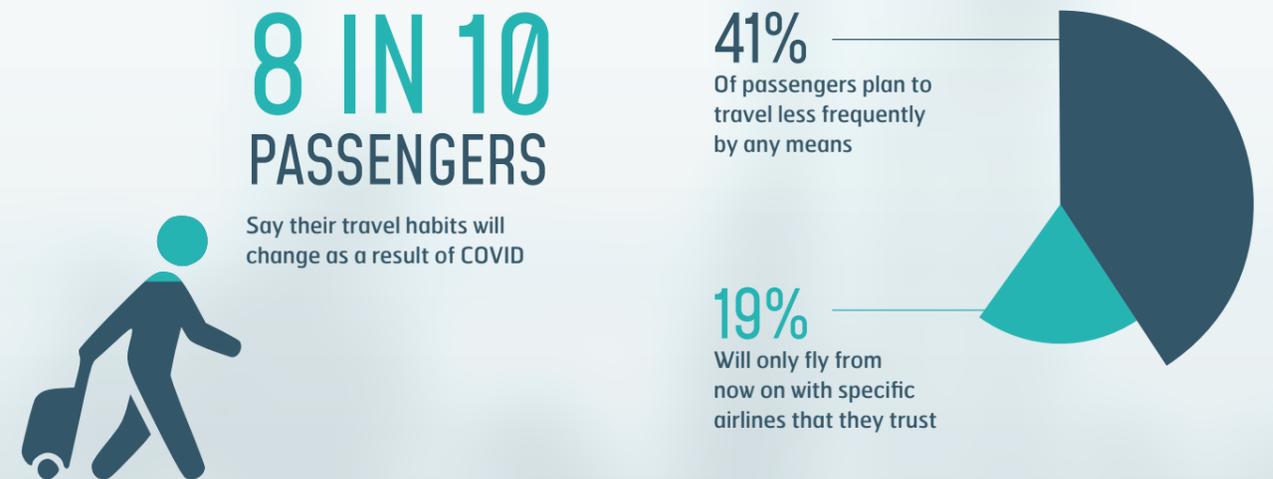
Technology can match passenger needs

Another key take out focuses on the role technology has to play in enhancing confidence at every stage of the passenger journey. With safety foremost in passengers' minds, a high proportion say that digital technology that empowers them, minimises contact and lessens touchpoints is reassuring.

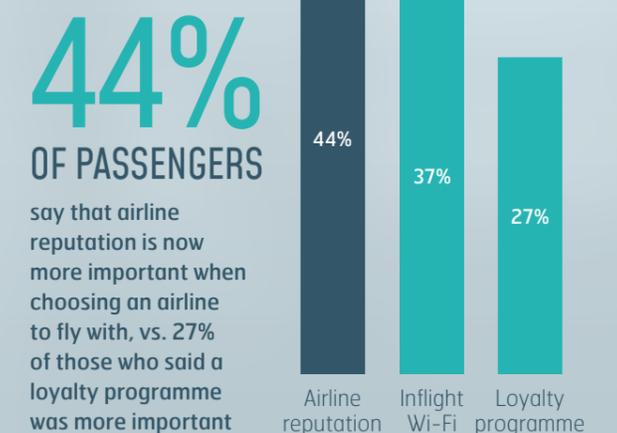
Indeed, 79% of all passengers say their confidence would be increased inflight with destination status alerts, real time information and news about the place they were going to visit.

This enforced reset may then act as an accelerator for the digital transformation of the passenger experience. Of those surveyed, 40% say inflight Wi-Fi is more important to their enjoyment of the flying experience; more than those who say inflight entertainment has become more important (27%). Inflight broadband is also important when it comes to choosing who to fly with – 37% say availability of inflight Wi-Fi is more crucial, compared to 35% who say airport location is more important in their airline choice.

We hope that our Passenger Confidence Tracker will act as a catalyst as you plan your path to a sustainable and profitable recovery.



Almost half of travellers feel confident about flying within the next 6 months



METHODOLOGY

Fieldwork during October 2020.

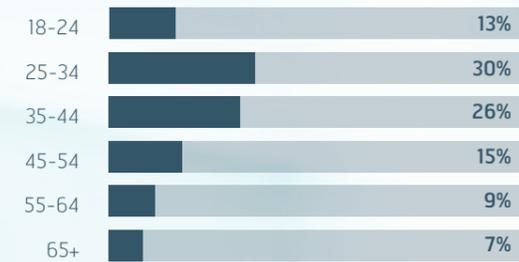
All respondents have taken a flight, for either leisure or business purposes, in the past 18 months.



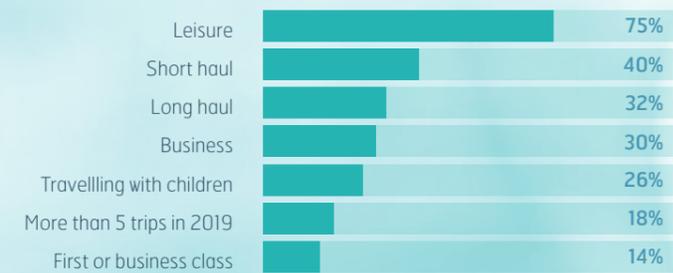
● Female 47% (4,501)
● Male 53% (5,073)

Australia	508
Brazil	1,009
Finland	1,011
Germany	505
Hungary	1,002
India	1,004
Singapore	501
South Korea	503
Spain	1,015
UAE	515
UK	1,001
US	1,022
TOTAL	9,596

Age distribution



In 2019, which of these trips did you take?



Fieldwork carried out by
Yonder (formerly Populus)

.YONDER



CHANGING PASSENGER ATTITUDES – AND BEHAVIOURS

Almost all (99%) passengers say COVID-19 has affected their behaviour. When it comes to flying, the potential inconvenience – quarantining, border closures and non-uniform safety protocols – ranks alongside fear of catching the virus.

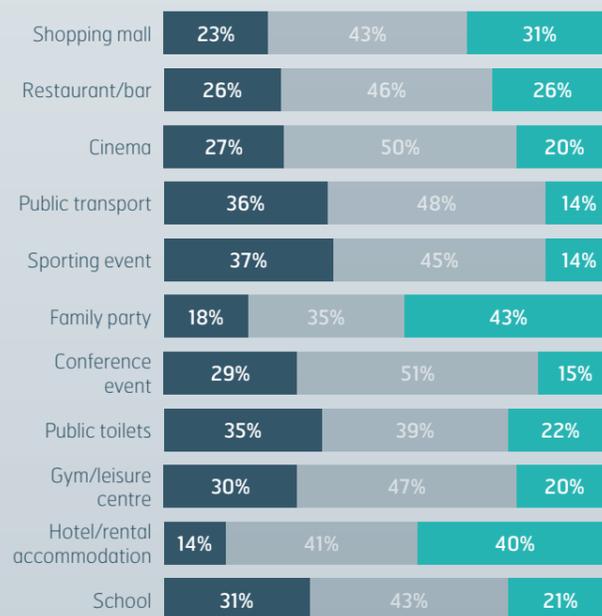
There are also some interesting perceptions to be drawn – 43% believe a family party is less risk than flying for example. So while, 80% of respondents say they are cautious (48% highly; 32% fairly) this does offer airlines an opportunity. Those carriers that can demonstrate a safe passenger journey stand to benefit from the fact that nearly two thirds (65%) of passengers

expect to take a flight again at some point in the next year. Of course, there are some factors that are outside of aviation's control – the economic impact of the crisis is the biggest experienced effect – and the fact that 31% say they will fly less is cause for concern. Therefore, managing passenger perceptions and allaying any misconceptions should be a top priority.

Q:
In comparison to catching a flight, would you consider these places to be higher or lower risk for catching the coronavirus?

There are significant variations in how much risk passengers estimate different activities to have compared with taking a flight.

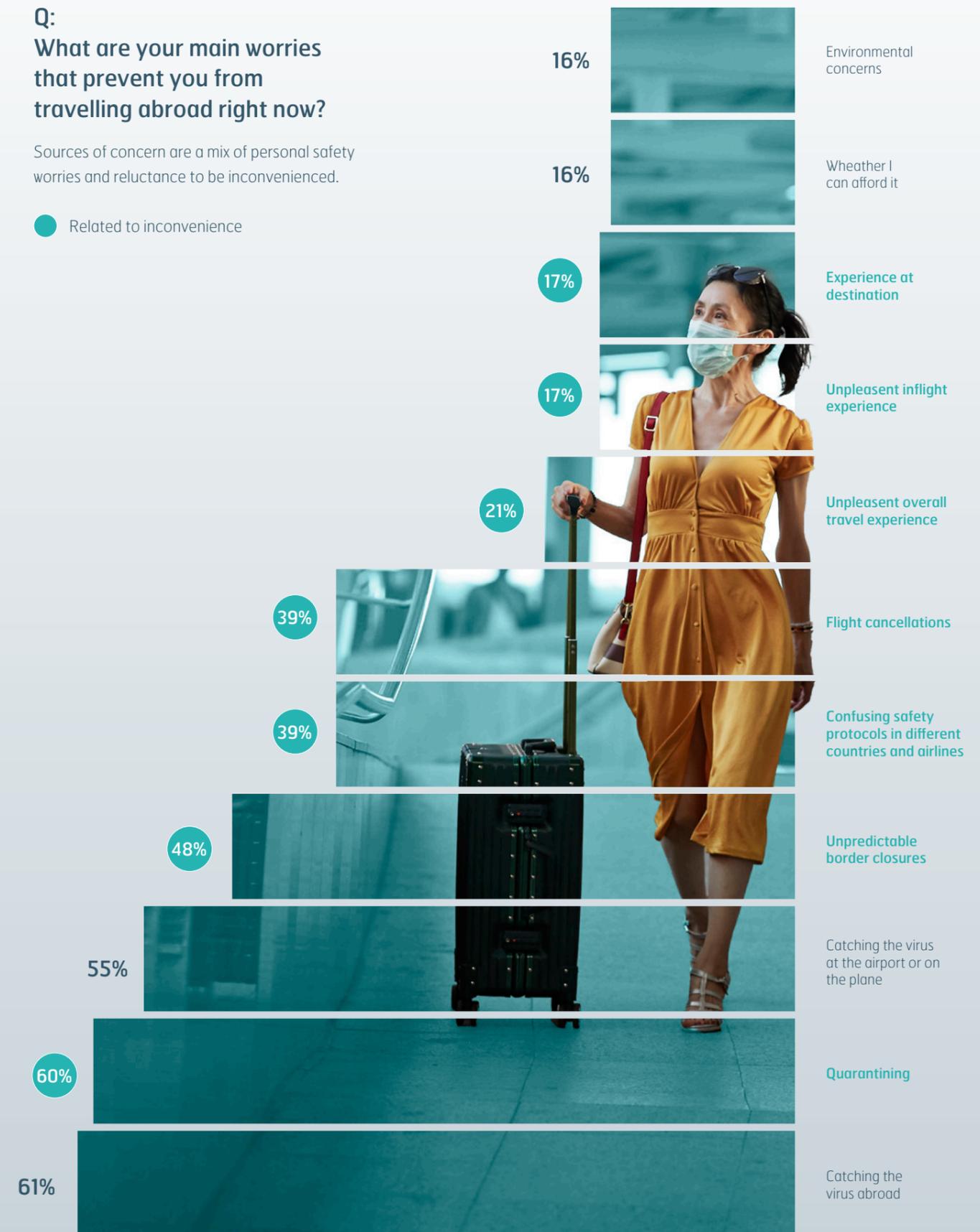
- MORE risk than a flight
- Just as risky as a flight
- LESS risk than a flight



Q:
What are your main worries that prevent you from travelling abroad right now?

Sources of concern are a mix of personal safety worries and reluctance to be inconvenienced.

● Related to inconvenience





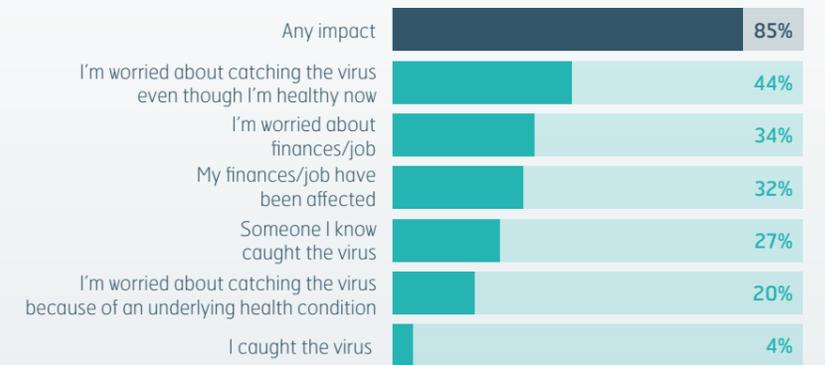
Q:
Which of the following best describes your current behaviour to avoid COVID-19?

Nearly half of all passengers describe their current behaviour as 'highly cautious'



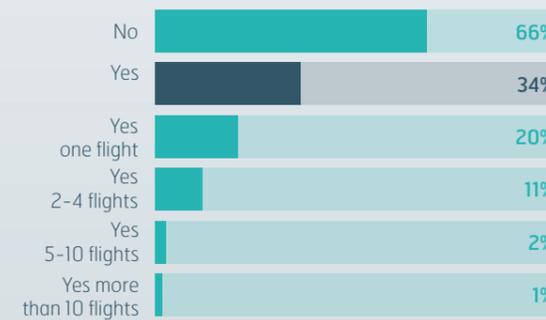
Q:
How have you been impacted by the COVID-19 pandemic?

Anxiety over personal safety is more prevalent, but economic impact is the biggest experienced effect of the pandemic.



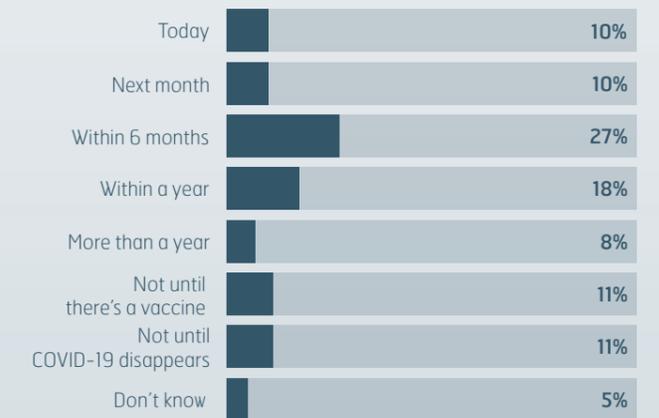
Q:
Have you taken any airline flights in 2020 since the pandemic reached your country?

A third of respondents had taken at least one flight in 2020.



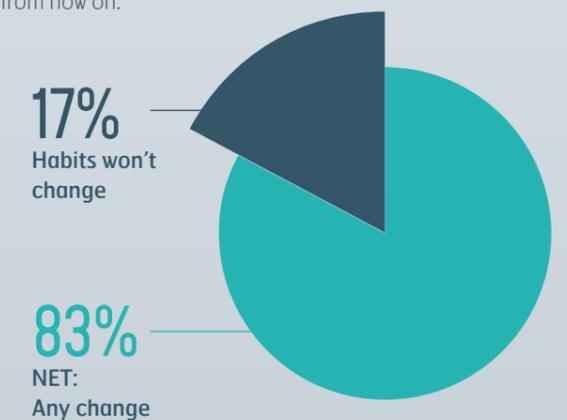
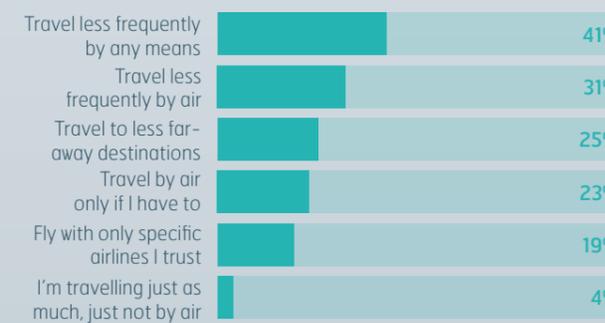
Q:
When would you be confident to take your next flight?

Nearly two thirds of passengers expect to fly again within a year.



Q:
How are your travel habits likely to change post-COVID-19?

Less than one third of passengers say they will travel less frequently by air from now on.



THINK GLOBAL, ACT REGIONAL

Those looking for a broadly uniform global approach to the pandemic will be disappointed. There are a number of international variations when it comes to behaviour and beliefs.

For example, passengers in the Asia-Pacific region are more satisfied with airlines' response to COVID than those in Europe. And while the impact of the pandemic seems to affect confidence on a country-by-country basis, behaviour doesn't always chime with levels of caution. Take Finland and India for instance. In Finland, only 10% are highly cautious, yet 83% haven't taken a flight since the pandemic hit their country. Conversely,

India displays pronounced levels of caution - 75% admit to being highly cautious - yet 56% have taken a flight. Ironically, both were in agreement, however, that a bar/restaurant setting carries a higher risk than taking a flight. So, although that makes it difficult for airlines to adopt a unilateral set of measures, they can at least begin to think regionally.

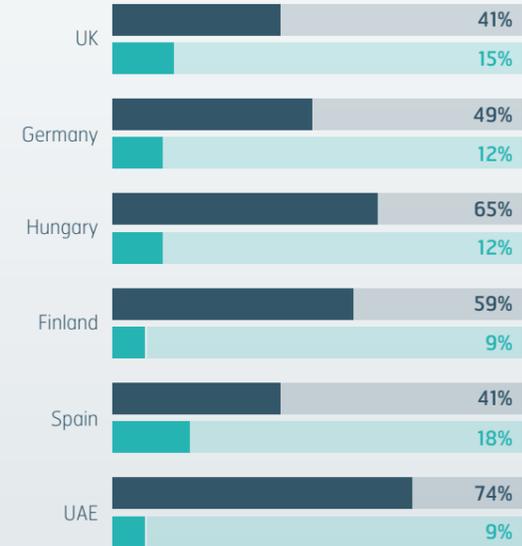
Q:
To what extent have you been satisfied or unsatisfied with airlines' response to the pandemic?

APAC countries are generally more likely to be satisfied with airlines' response to the pandemic than European countries - with the UK and Spain most likely to be unsatisfied.

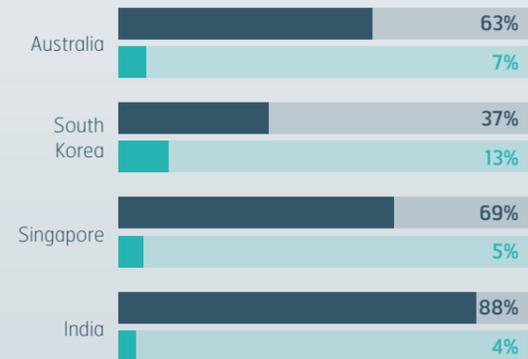


● Total Satisfied ● Total Unsatisfied

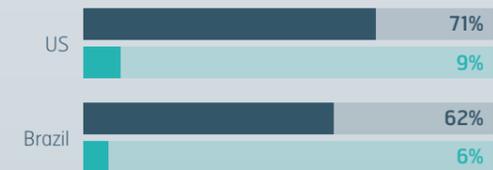
Europe and the Middle East



Asia-Pacific



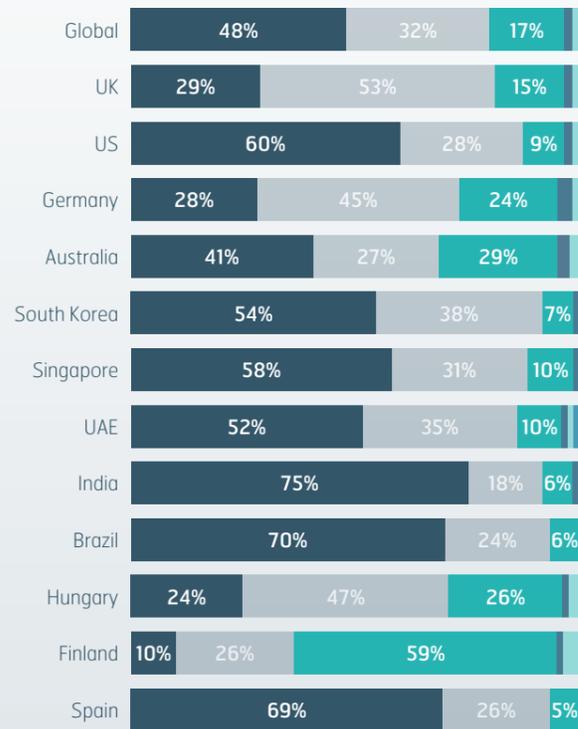
Americas



Q:
Which of the following, best describes your current behaviour to avoid COVID-19?

Passengers' levels of personal precautions seem to vary according to the level of pandemic impact their country has experienced.

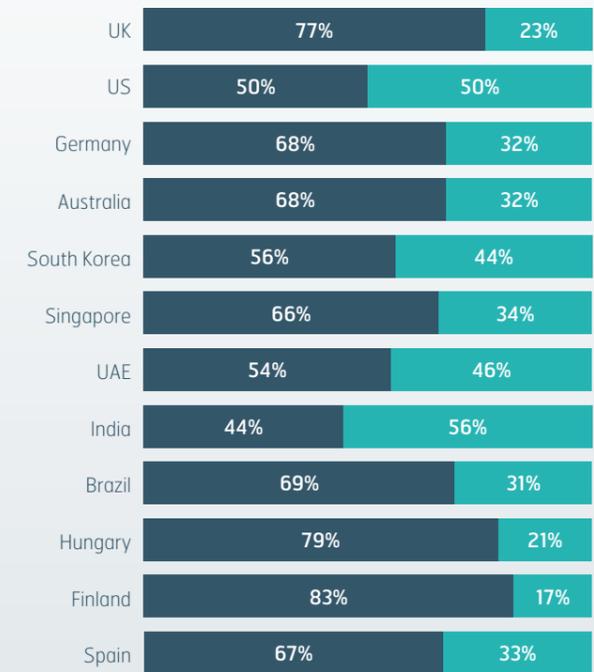
- Highly cautious, wear mask outside & limit contact with others
- Fairly cautious, wear mask in crowded places, socialise with friends & family only
- Doing normal activities with some extra precautions
- I am not taking precautions any more
- I never took precautions/changed my behaviour
- Prefer not to say



Q:
Have you taken any airline flights in 2020 since the pandemic reached your country?

The level of current flight demand doesn't always correspond with the level of personal precaution taken by passengers in each market.

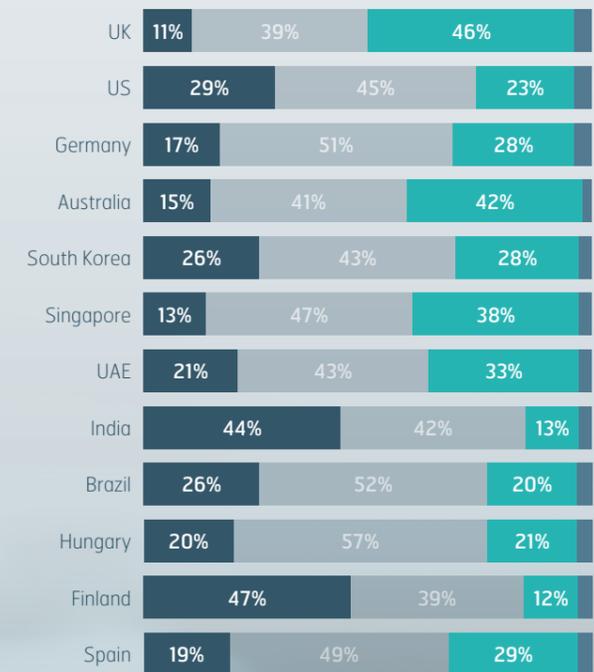
- No
- Yes



Q:
In comparison to catching a flight, would you consider a bar or restaurant to be higher or lower risk?

Taking a bar / restaurant as an example – there are also significant regional variations in the perceived risk of different social activities compared to taking a flight.

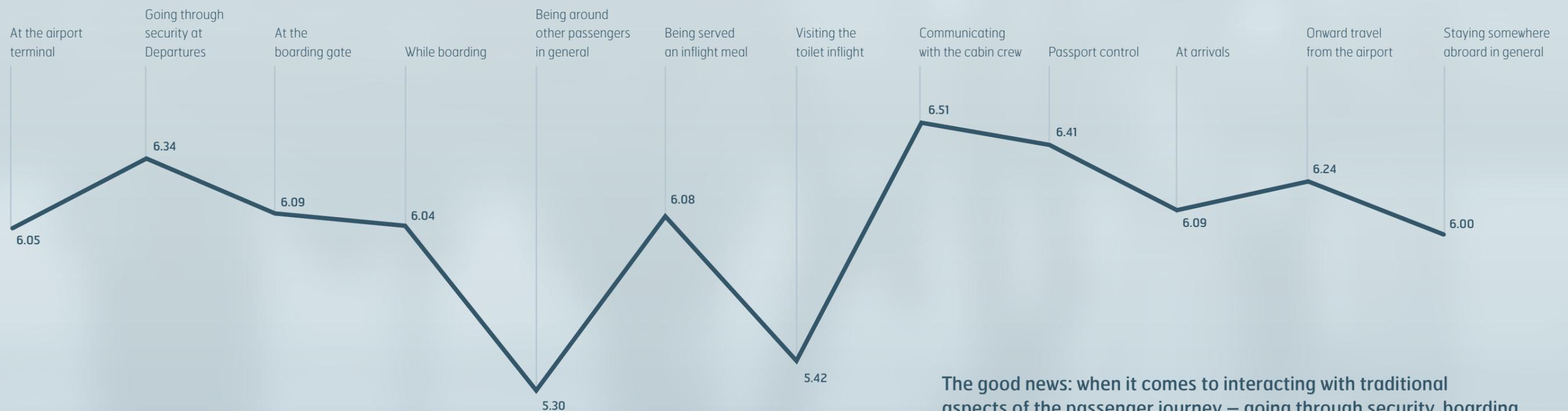
- MORE risk than a flight
- Just as risky as a flight
- LESS risk than a flight



PASSENGER CONFIDENCE VARIES THROUGHOUT THE JOURNEY

Q:
How confident would you feel with regards to SAFETY / HEALTH PRECAUTIONS at the following points in a journey?

Mean score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident



The good news: when it comes to interacting with traditional aspects of the passenger journey – going through security, boarding or communicating with cabin crew for example – confidence is generally high.

Anxiety becomes a factor when other passengers come into the mix – visiting the toilet inflight or just being around other flyers. Thankfully, passengers respond positively to technology that can smooth the journey. In particular tech that provides information (tracing app verification and destination status alerts) or eliminates/lessens contact with people (real time luggage tracking,

facial recognition and digital safety cards/inflight magazines). Overall, the effect of new technologies on passenger confidence is positively heightened at all three potential pressure points – at the airport generally; while boarding and in the cabin. Thermal scanning, reallocation of empty seats and contactless payments being particular favourites.

Technology to increase passenger confidence falls into two general groups; enhancing passenger information, and minimising passenger contact (either with airline crew or with other passengers)

Enhancing passenger information

- Real time luggage tracking
- Tracing app verification
- Immunity passport on mobile
- Thermal scanning
- Destination status alerts
- Video medical support

Minimising contact

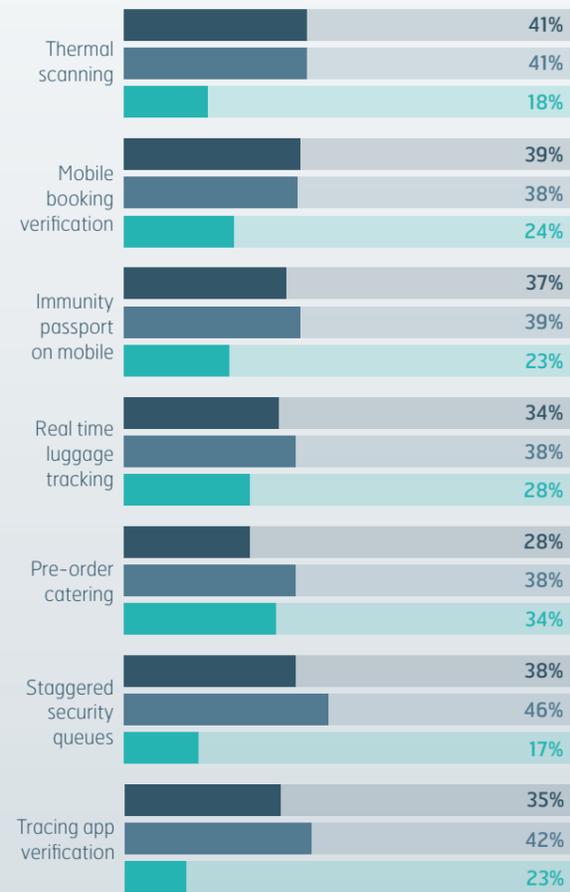
Minimising crew contact

- Mobile booking verification
- Pre-order catering
- Facial recognition security
- Contactless payment
- Crew chatbots

Minimising passenger contact

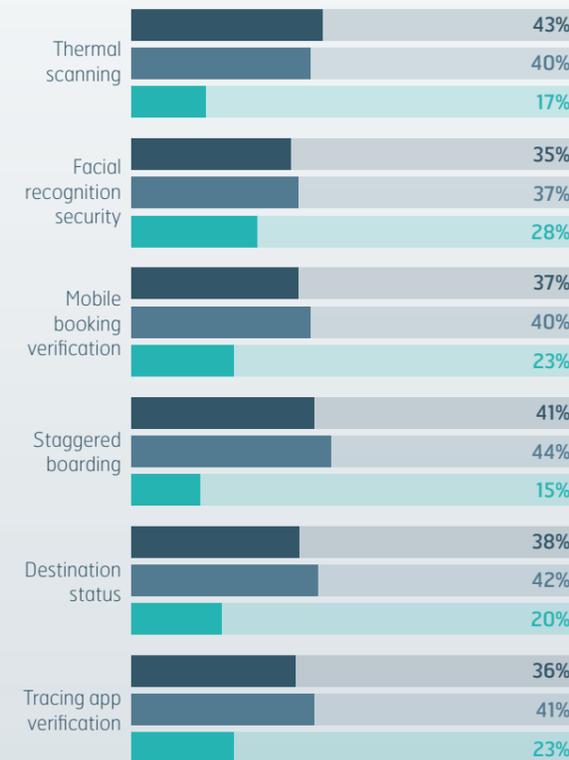
- Staggered queues
- Staggered boarding
- Pre-landing immigration clearance
- IFE on own device
- Toilet queue booking app
- Empty seats allocation for distancing
- Digital safety card and inflight magazine
- Crew chatbots

Q: Effects on confidence of new technologies at the airport

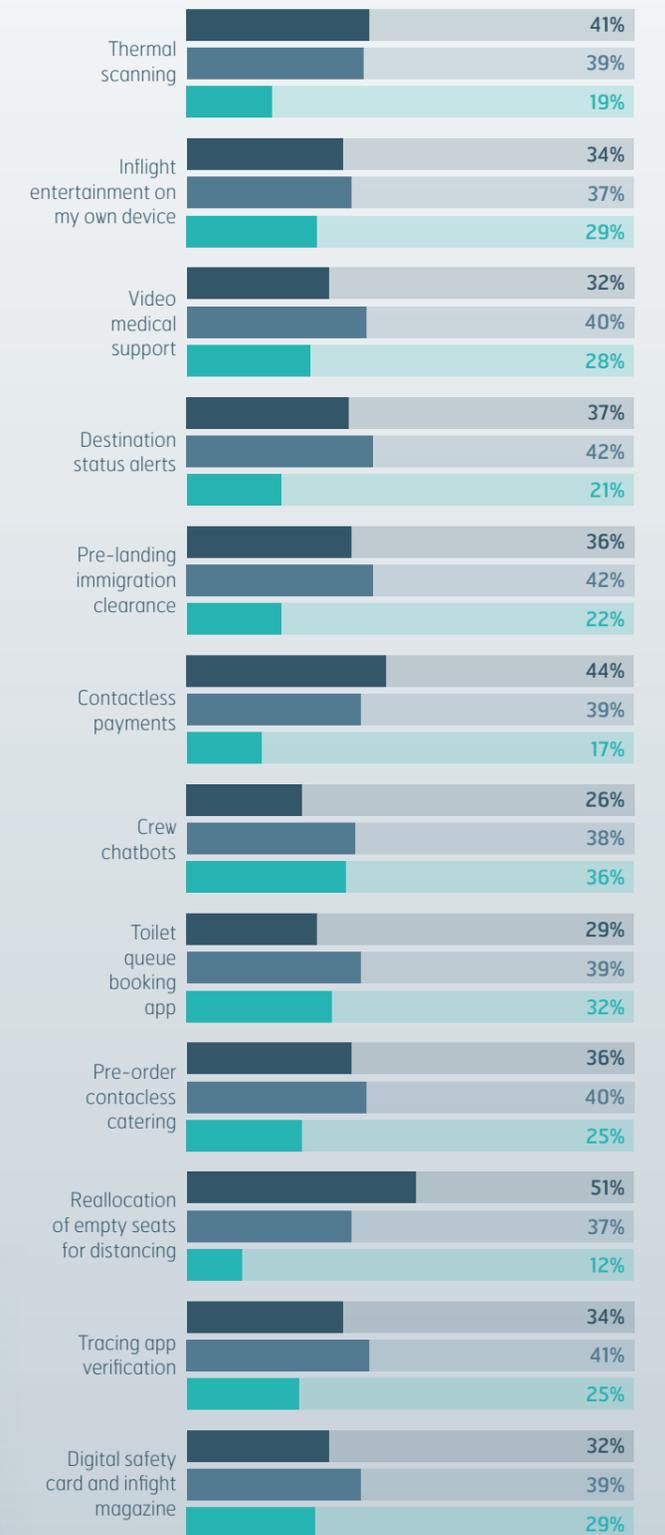


- Would significantly improve my confidence
- Would slightly improve my confidence
- Would make no difference to my confidence

Q: Effects on confidence of new technologies in boarding



Q: Effects on confidence of new technologies in the cabin



WHAT PASSENGERS WANT IN THE NEW NORMAL

We've all read a great deal about the new normal. Aviation is no different. The air travel experience has fundamentally changed forever. This is abundantly clear when examining what things passengers want to remain even after the pandemic is over.

Many of these are driven by digital technology – for example 45% want more online destination alerts; 43% want real time luggage tracking and 40% think facial recognition technology should be more widely adopted. The events of the last few months have had ramifications for other areas of passenger experience too. 41% say the service experience is more important than before. Likewise, 39% believe inflight Wi-Fi has

risen in significance. Factors affecting which airline to fly with are also changing. Those carriers that guarantee cabin cleanliness (68% say this is more important now) will benefit from these changing attitudes. Other critical factors include ticket price (47% believe this is more important than before), airline reputation (44%) and sustainability (42%).

Q: What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?

There are new aspects of the travel experience that passengers want to remain even after the pandemic is over – largely driven by opportunities for digital information and engagement.

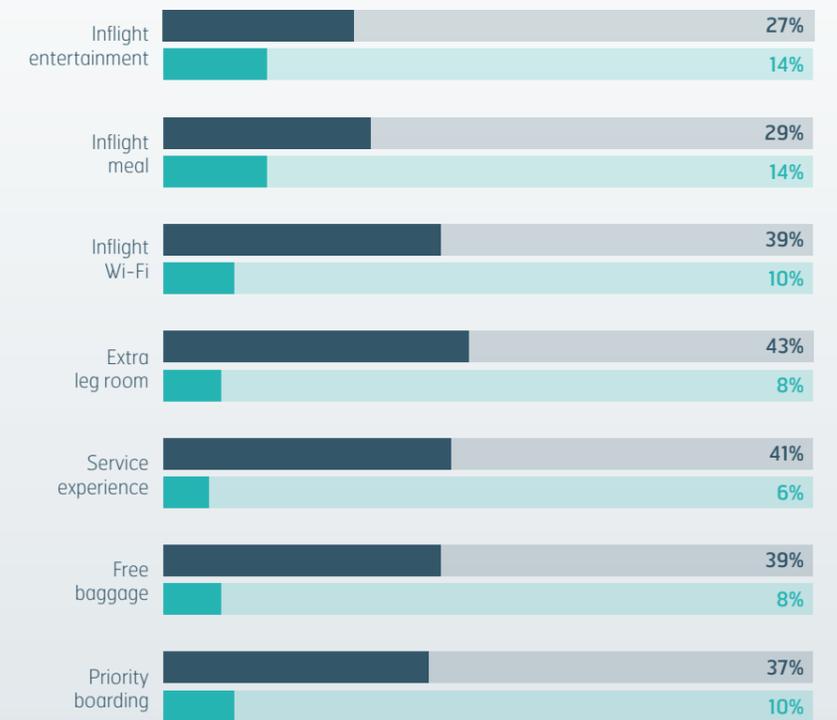




Q: When it comes to the enjoyment of your flying experience, how have these factors changed in importance?

As a result of the pandemic, some aspects of the passenger experience are now more important for passenger satisfaction than they were before.

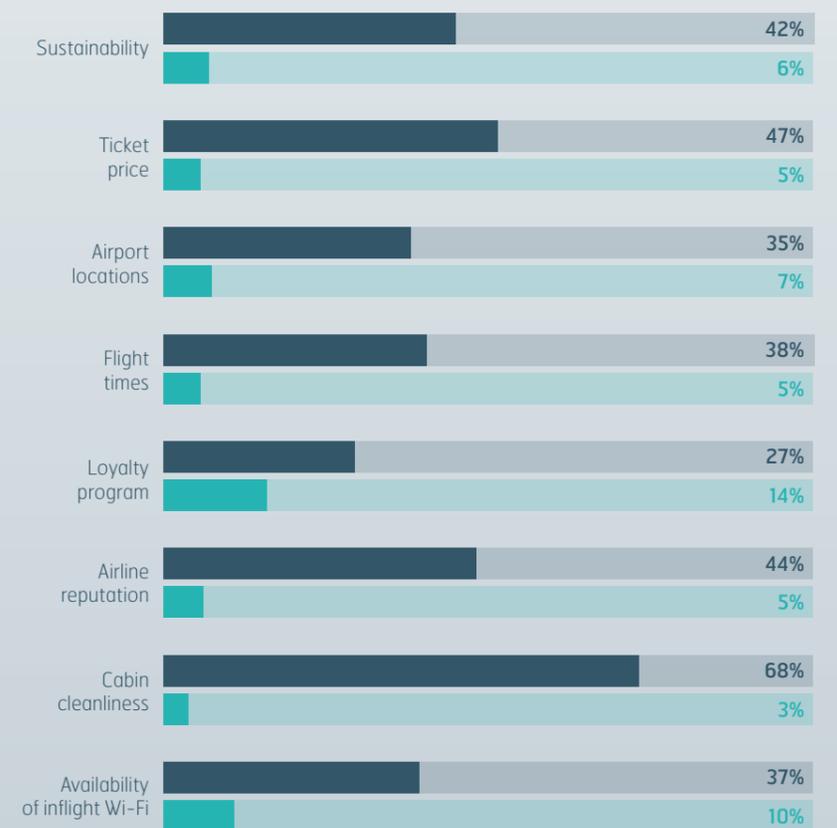
- More important
- Less important



Q: When it comes to choosing an airline, how have these factors changed in importance?

In 2020 some features are now more influential in how people choose which airline to fly with.

- More important
- Less important



ACTIONABLE INSIGHTS ACCORDING TO PASSENGER TYPES

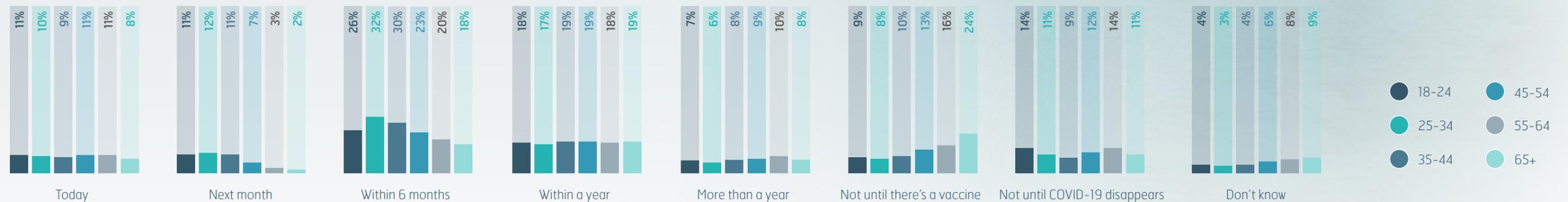
By slicing the data according to different cohorts – age, gender, traveller type – some patterns begin to emerge.

Women are less confident throughout the entire passenger journey. Younger passengers (those under 34) are more confident about flying at some point in the next six months, while those over 65 are the group most likely to wait for a vaccine before boarding a plane again. When it comes to flying less frequently, 40% of business travellers say they'll reduce their number of flights, while young adventurers are least likely to

change their flying habits. Frequent flyers (those of all ages and nationalities who took more than five flights in 2019) are unsurprisingly the most confident at each stage of the passenger journey. Similarly, those that identify as highly cautious are the least confident. Airlines that passengers look upon as trusted stand to benefit as flyers increasingly intend to only travel with such carriers.

Q: When would you be confident to take your next flight?

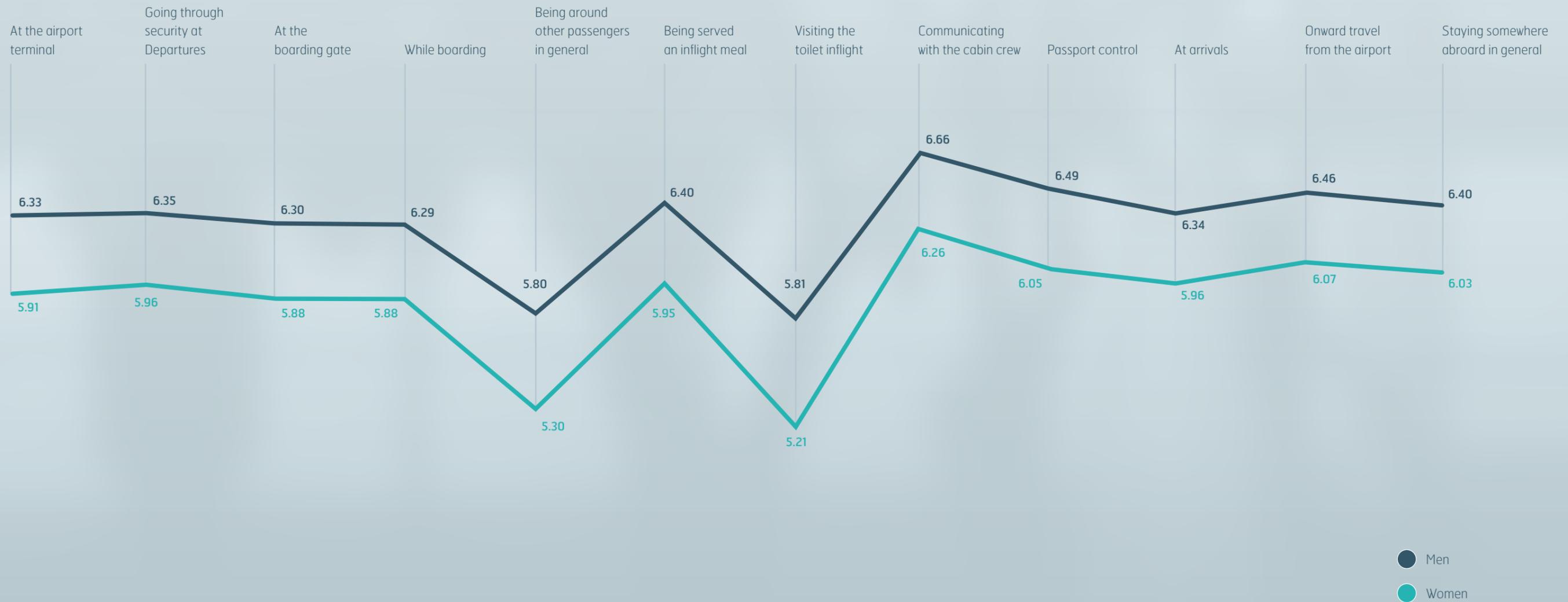
Younger passengers are keen to fly within 6 months, whereas over 65s are much more likely to wait for a vaccine.



Q:
How confident would you feel with regards to SAFETY/ HEALTH PRECAUTIONS at the following points in a journey?

Mean score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

Women are less confident throughout the whole passenger journey.



Traveller type profiles

We isolated different passenger types by profile and travel behaviour to compare their responses.

SHORT HAUL ONLY

2,182 respondents

All ages
All countries
ONLY flew short haul in 2019

FREQUENT FLYERS

1,764 respondents

All ages
All countries
Took more than 5 trips in 2019

YOUNG ADVENTURER

1,663 respondents

Under 34 years old
Leisure trips only in 2019
No trips with kids
Minus India, Hungary

FAMILY LEISURE MUMS

819 respondents

Females aged 25-54
Took a leisure trip in 2019
Travels with kids
All countries

BUSINESS TRAVELLER

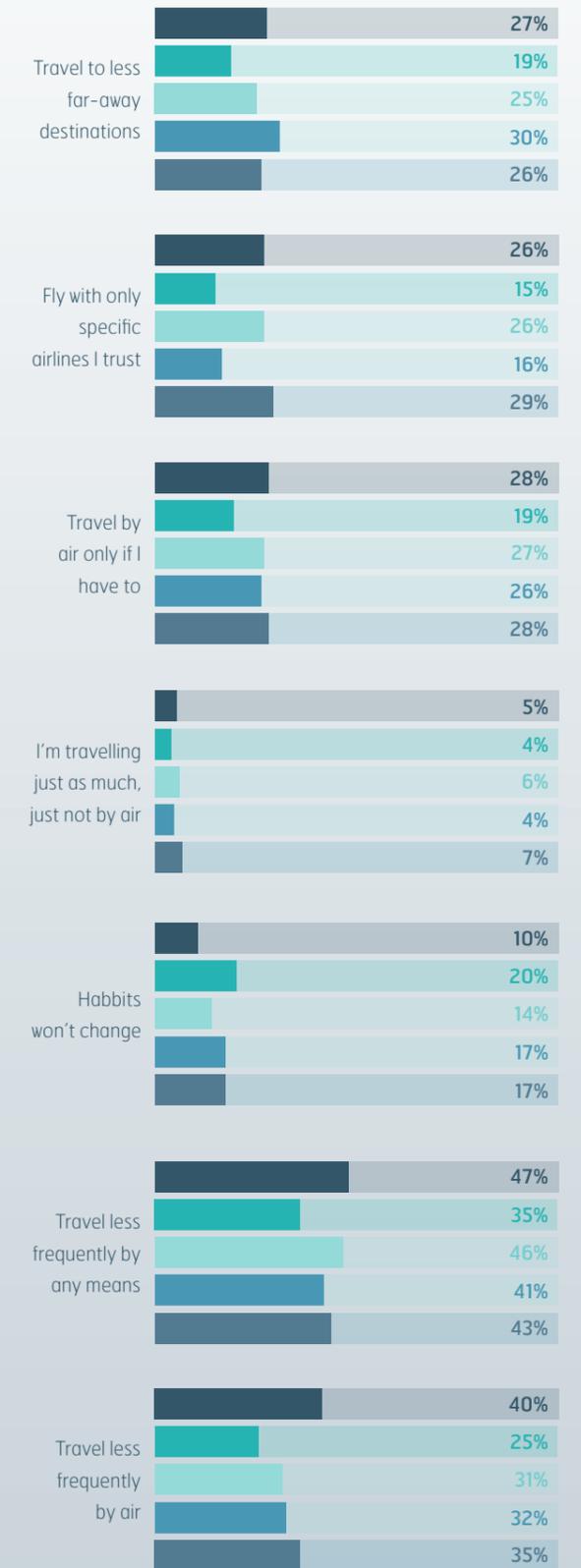
735 respondents

Middle aged+
Took a business trip in 2019
USA, UK, UAE, South Korea, Singapore, Germany, Australia

Q: How are your travel habits likely to change, if at all, from now on post-COVID-19?

Business travellers are foreseeing the biggest change to their travel habits, with young adventurers least likely to change their plans.

- Business traveller
- Young adventurer
- Family leisure mum
- Frequent flyer
- Short haul only



Traveller type attitudes

We isolated different passenger types by how they described their attitudes to compare their responses



WOULD TRAVEL TODAY

969 respondents
Respondents that answered they would be willing to fly today



PREFER TRUSTED AIRLINE

1,808 respondents
Respondents that answered they would change their future behaviour by flying only with specific airlines they trust



CAUGHT VIRUS

337 respondents
Respondents that answered they had caught the virus



HIGHLY CAUTIOUS

847 respondents
Highly cautious in personal precautions, are worried about catching the virus, and don't plan to fly within the year

Q:
What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?

Those who say they intend to only travel with specific trusted airlines in the future are more likely to respond positively to updates to the current travel experience.

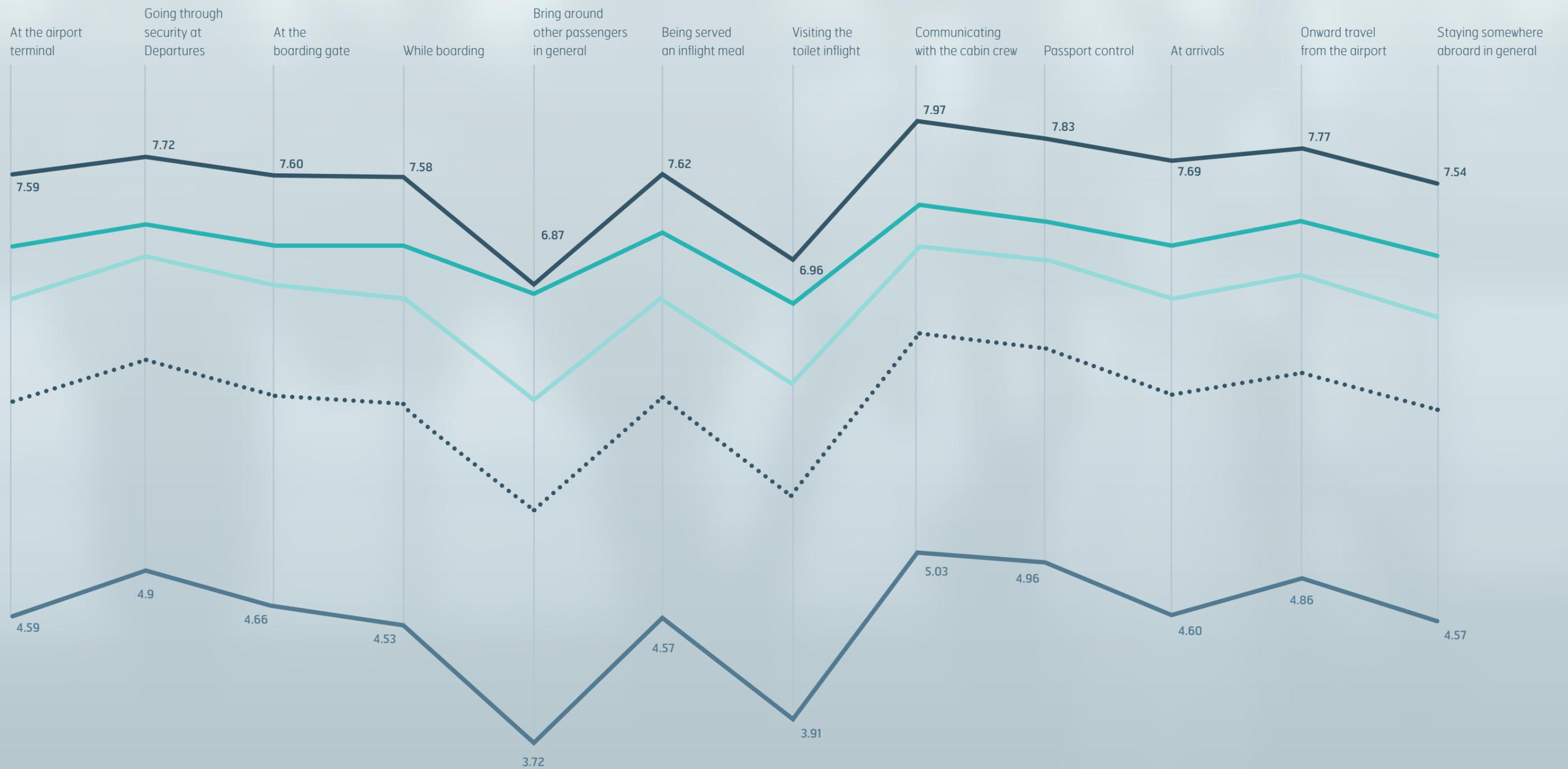


Q:
How confident would you feel with regards to SAFETY/ HEALTH PRECAUTIONS at the following points in a journey?

Mean score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

Highly cautious passengers are the least confident across the journey. Passengers who intend to travel only with specific trusted airlines in the future are more confident than average across the journey, but not as confident as those who have already caught the virus or those that would be happy travelling today.

- Would travel today
- Caught virus
- Prefer trusted airline
- Highly cautious
- All respondents



APPENDIX

For more information or
to get in touch, please go
to inmarsataviation.com

BUILT TO FLY

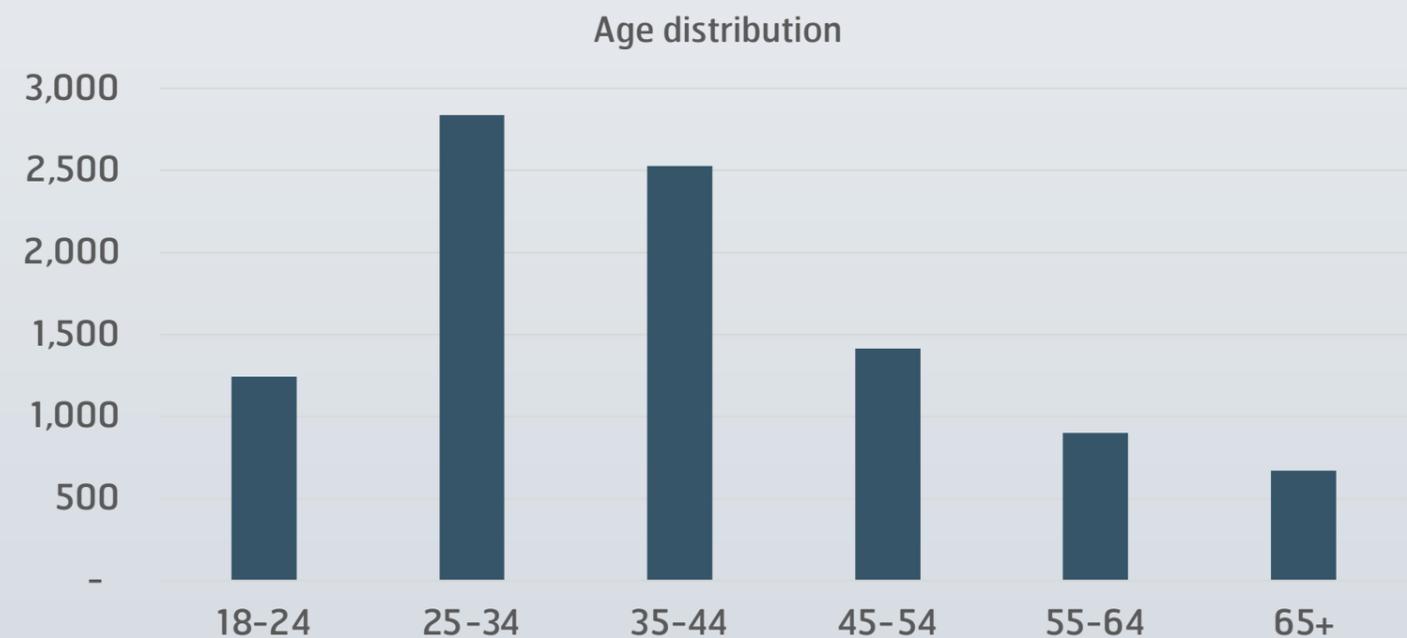
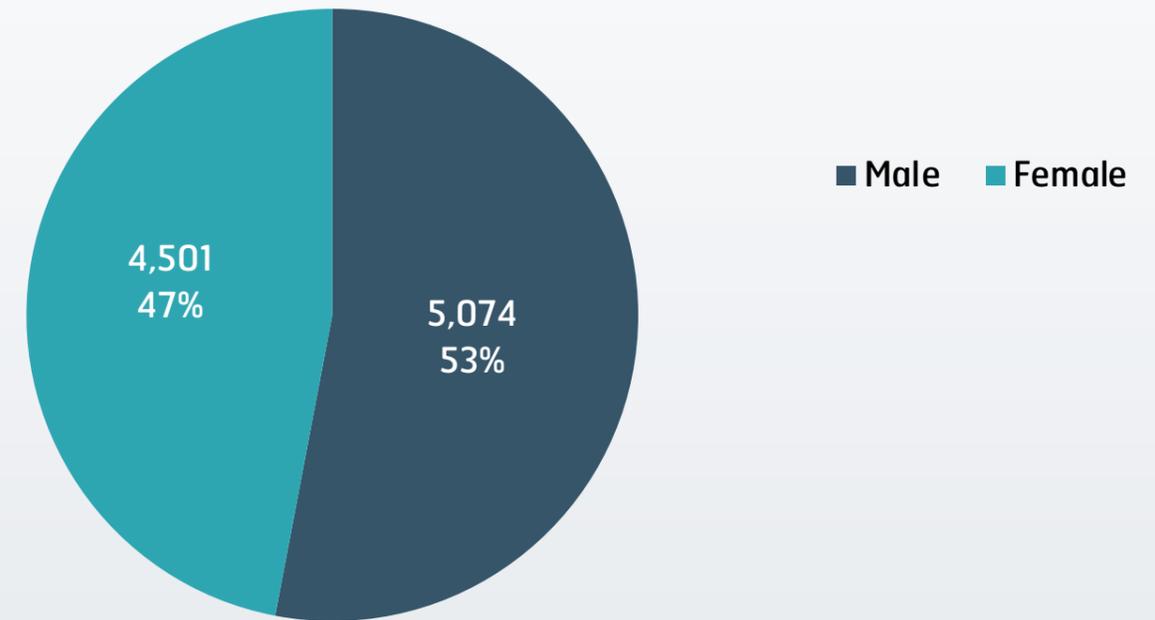

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Respondent Profiles

Survey Respondent Composition

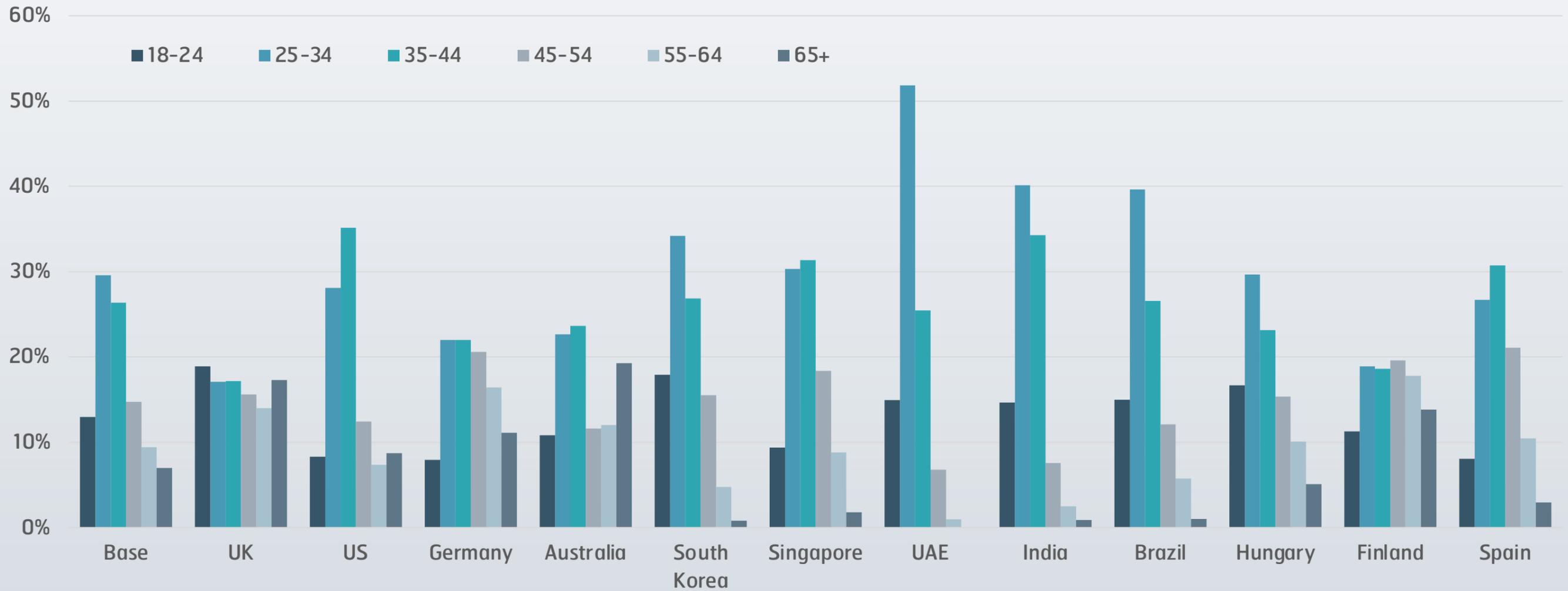
All respondents have taken a flight, for either leisure or business purposes, in the past 18 months

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Australia	508
South Korea	503
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Brazil	1,009
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Finland	1,011
Spain	1,015
TOTAL	9,596



Survey Respondent Composition

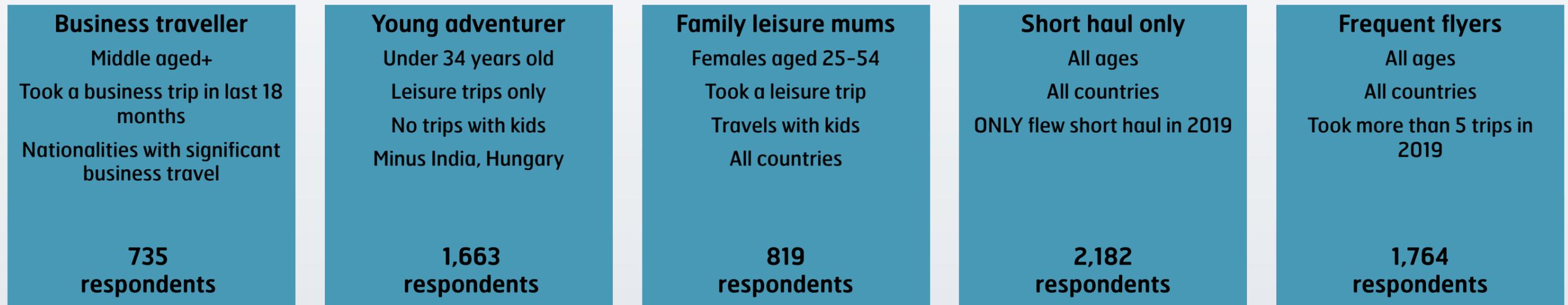
Age distribution by country



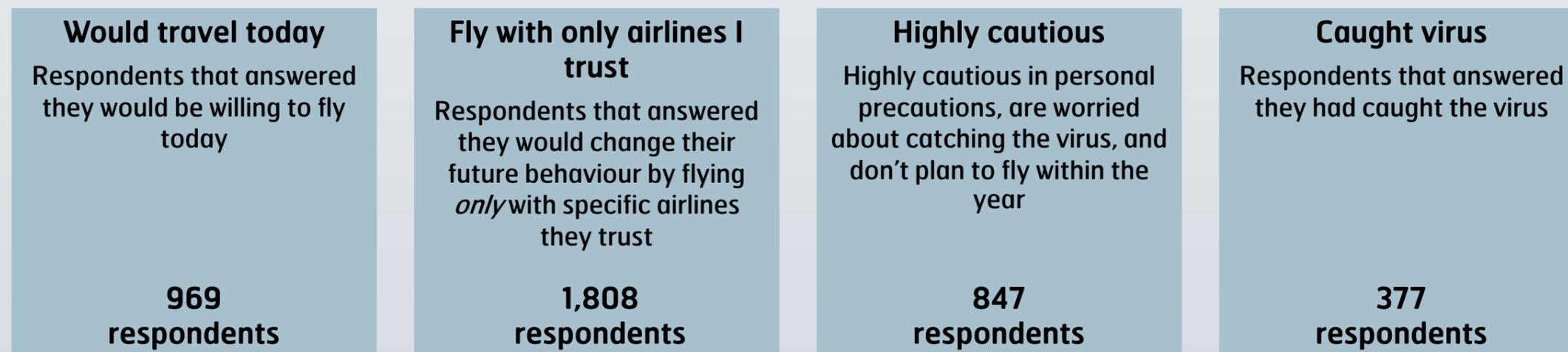
TRAVELLER TYPE SEGMENT COMPOSITIONS

9 Traveler Profile Types

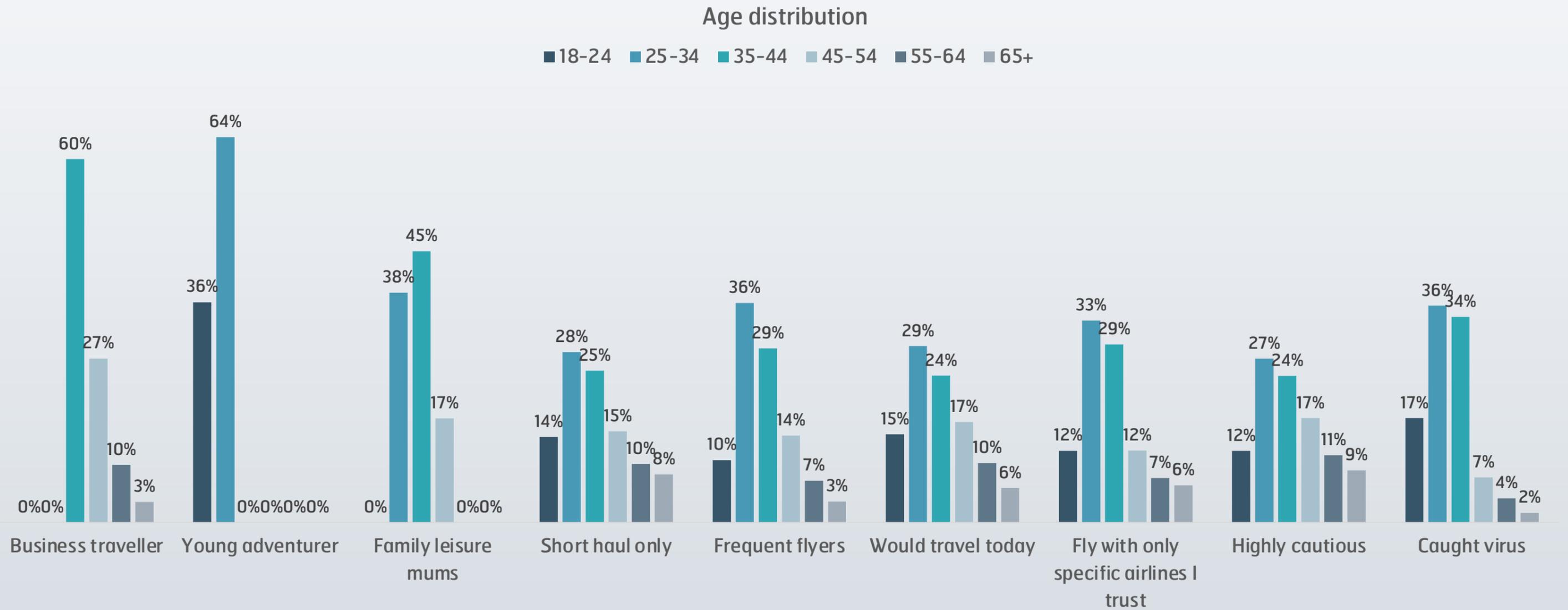
BEHAVIOUR PROFILES



ATTITUDE PROFILES

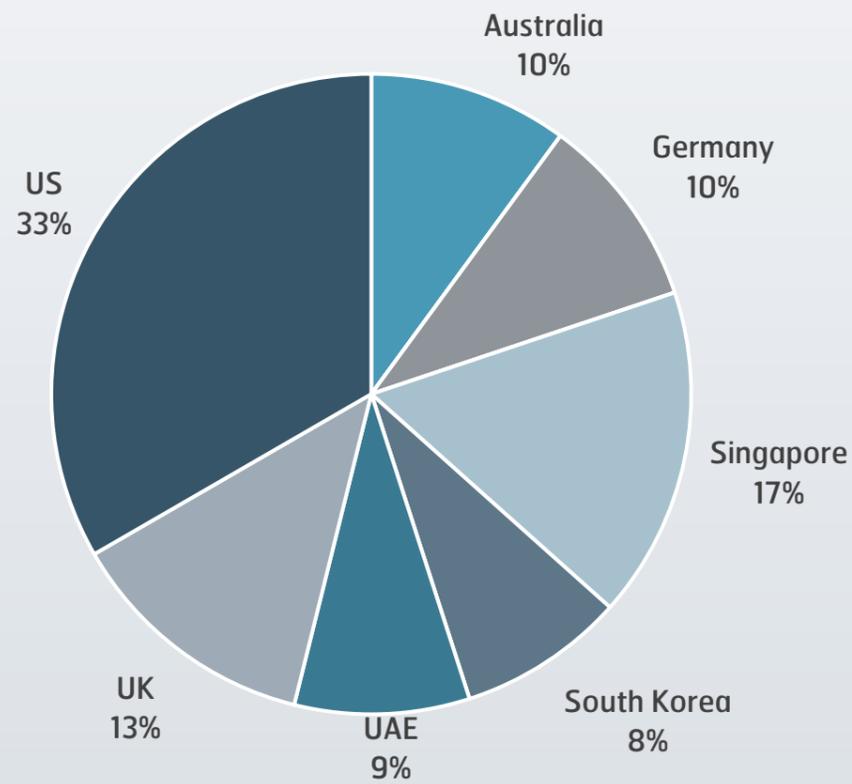


9 Traveler Profile Types

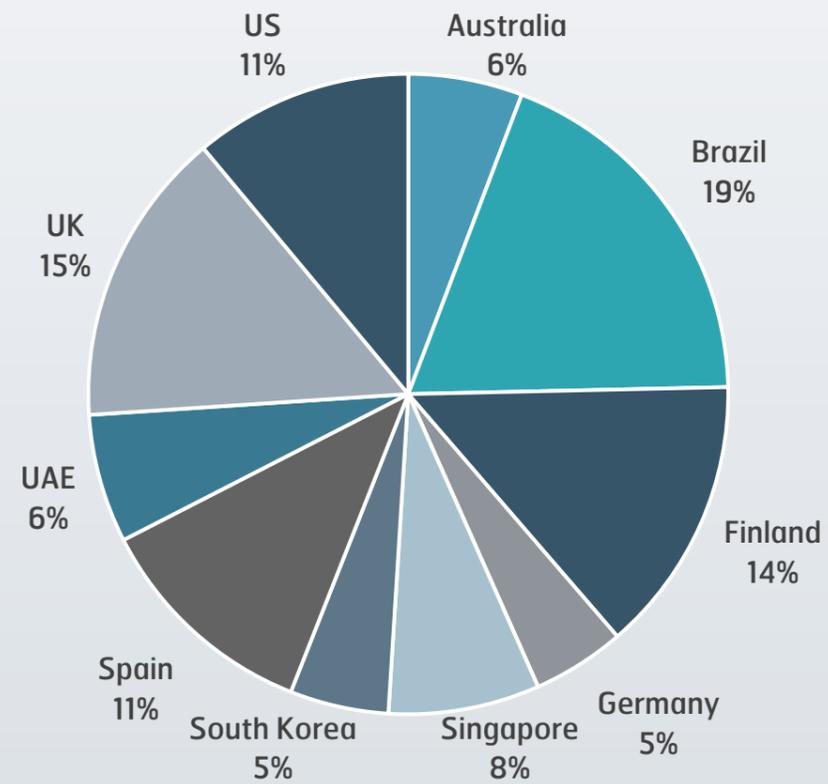


9 Traveler Profile Types

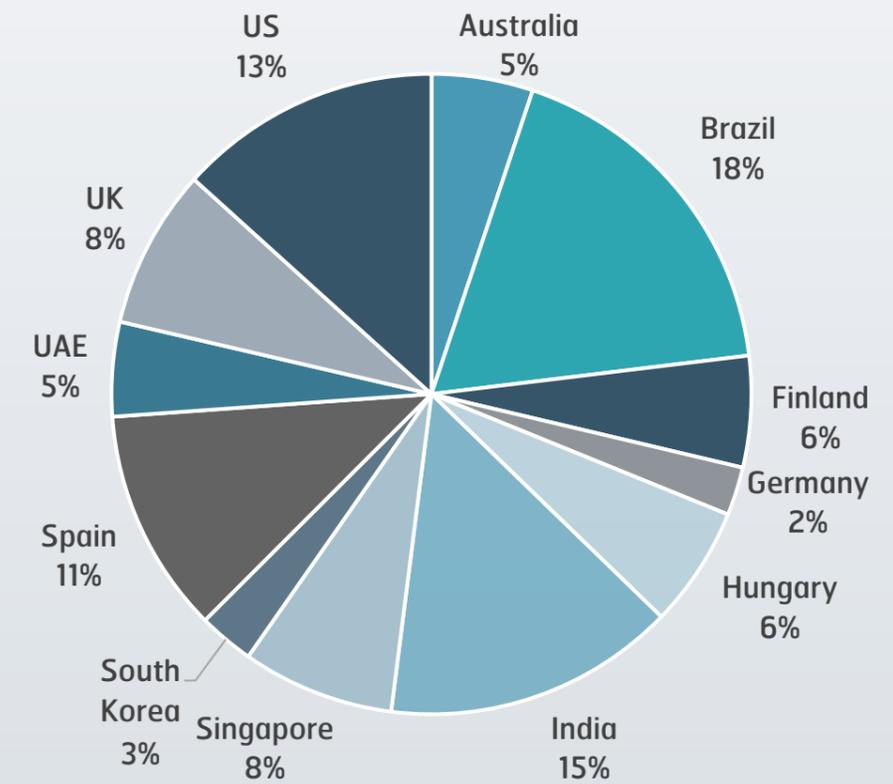
Business Traveler



Young Adventurer

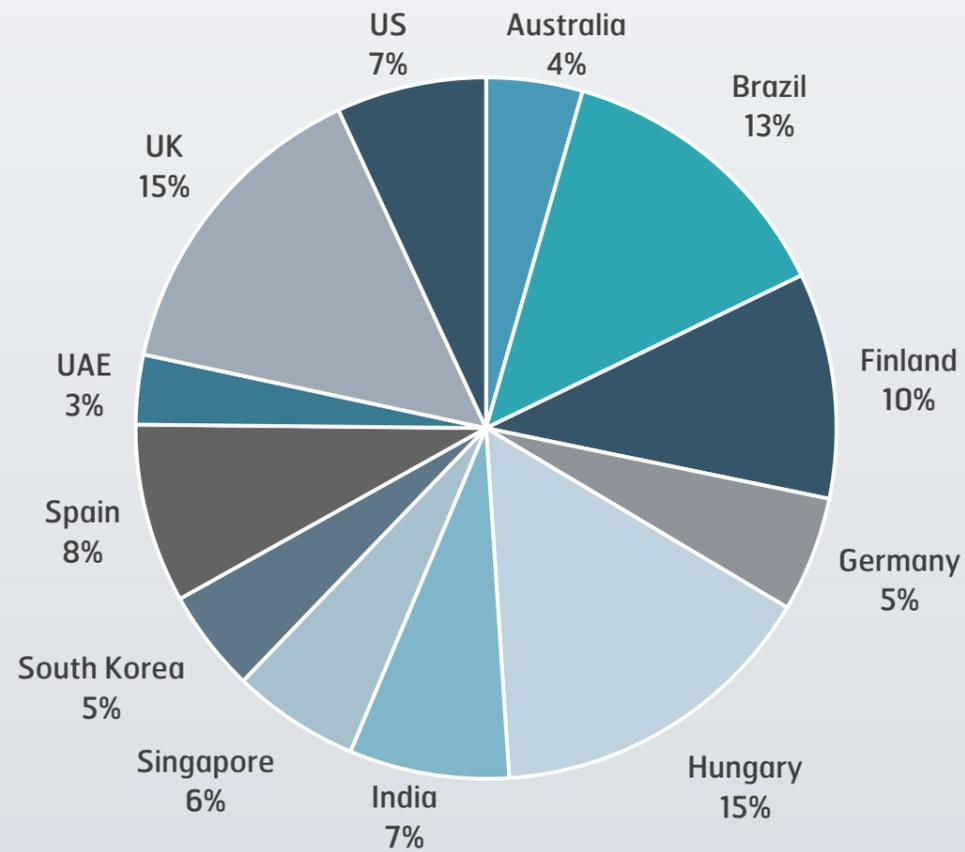


Family Leisure Mums

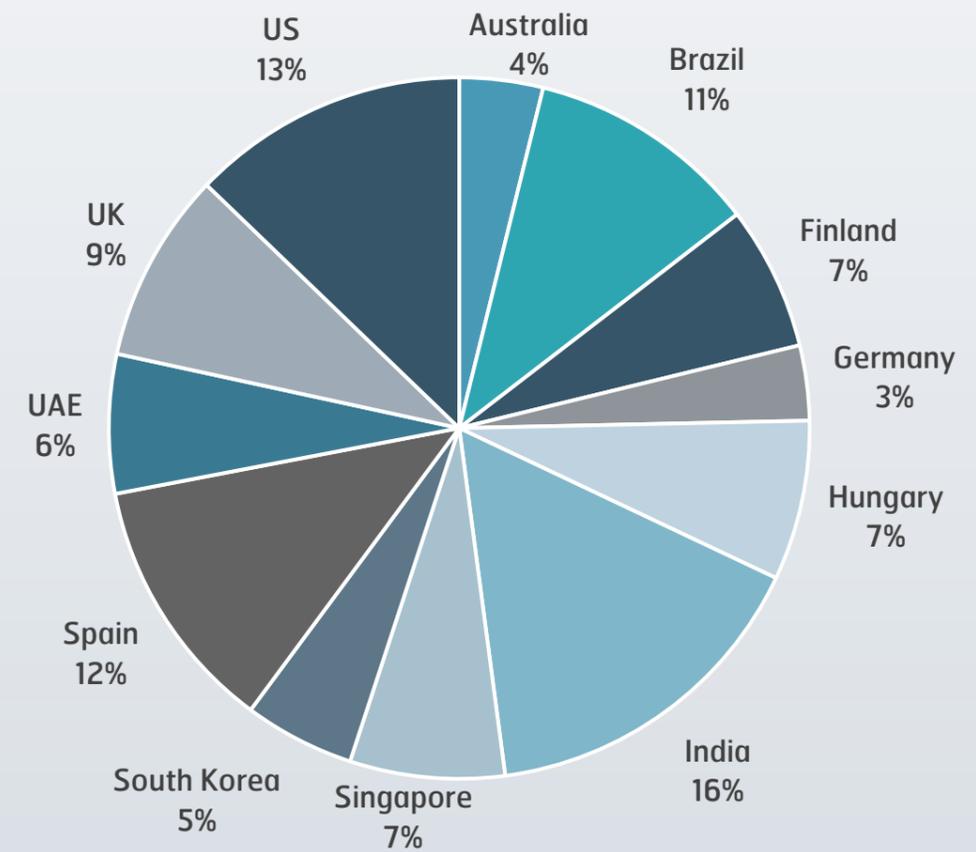


9 Traveler Profile Types

Short haul only

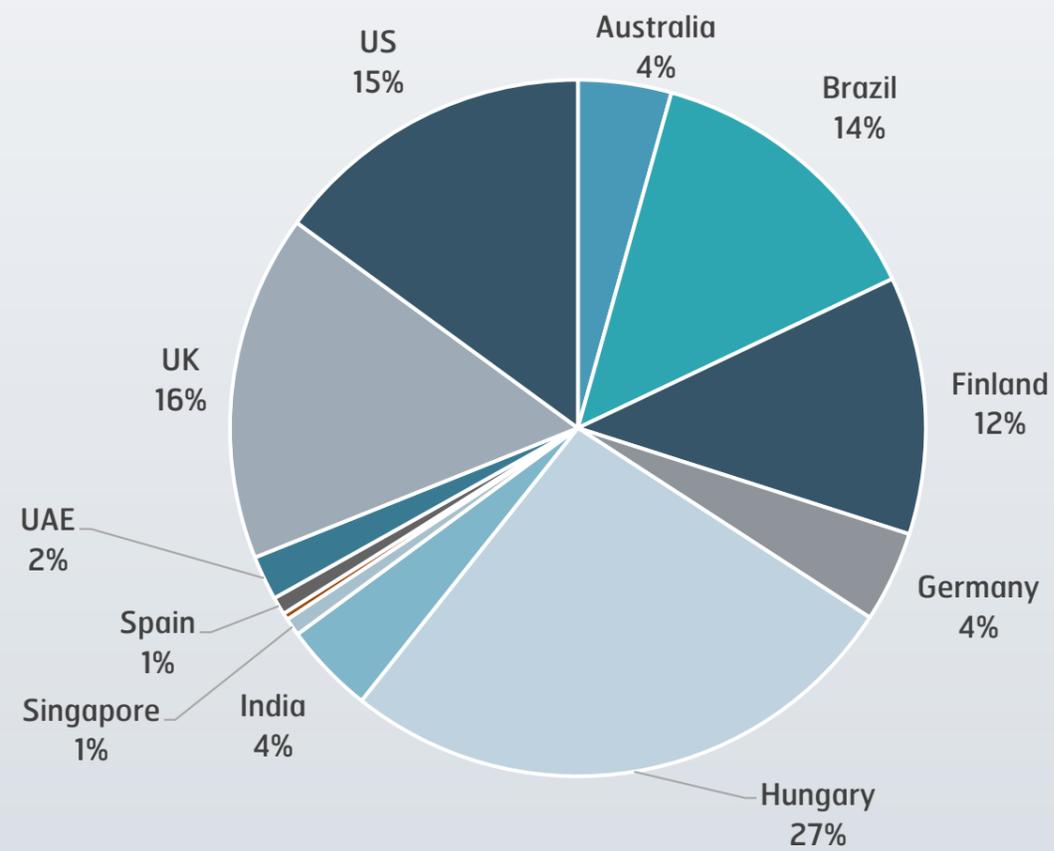


Frequent flyers

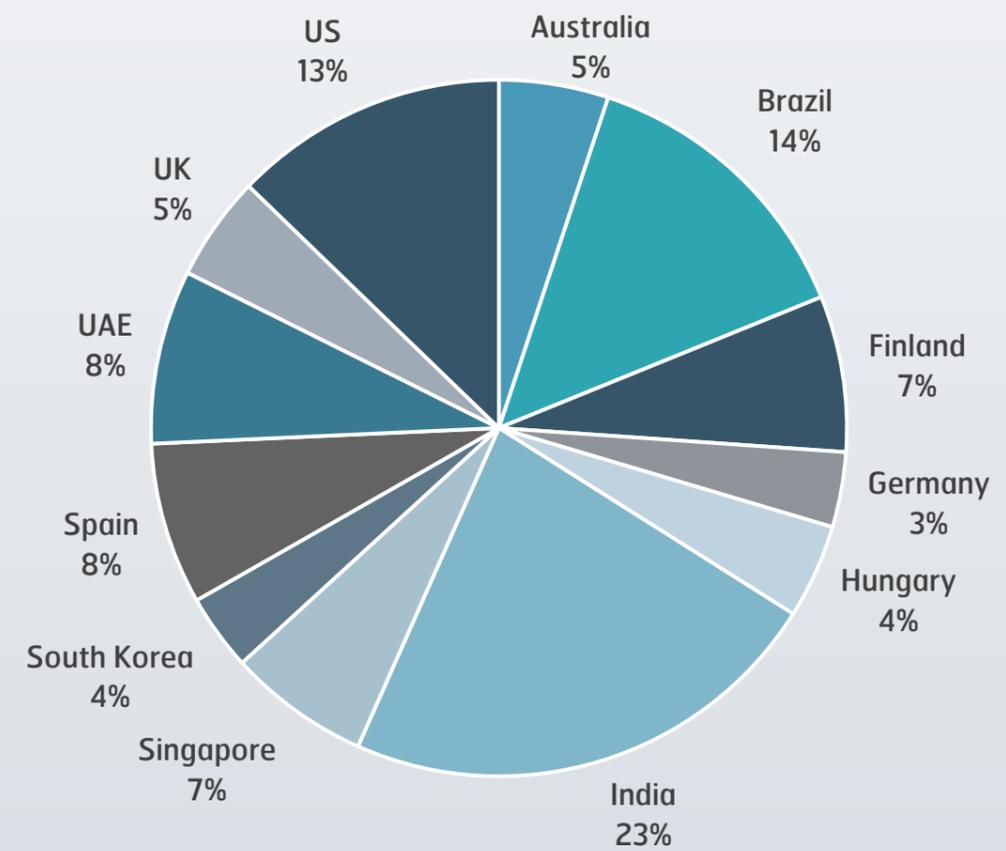


9 Traveler Profile Types

Would travel today

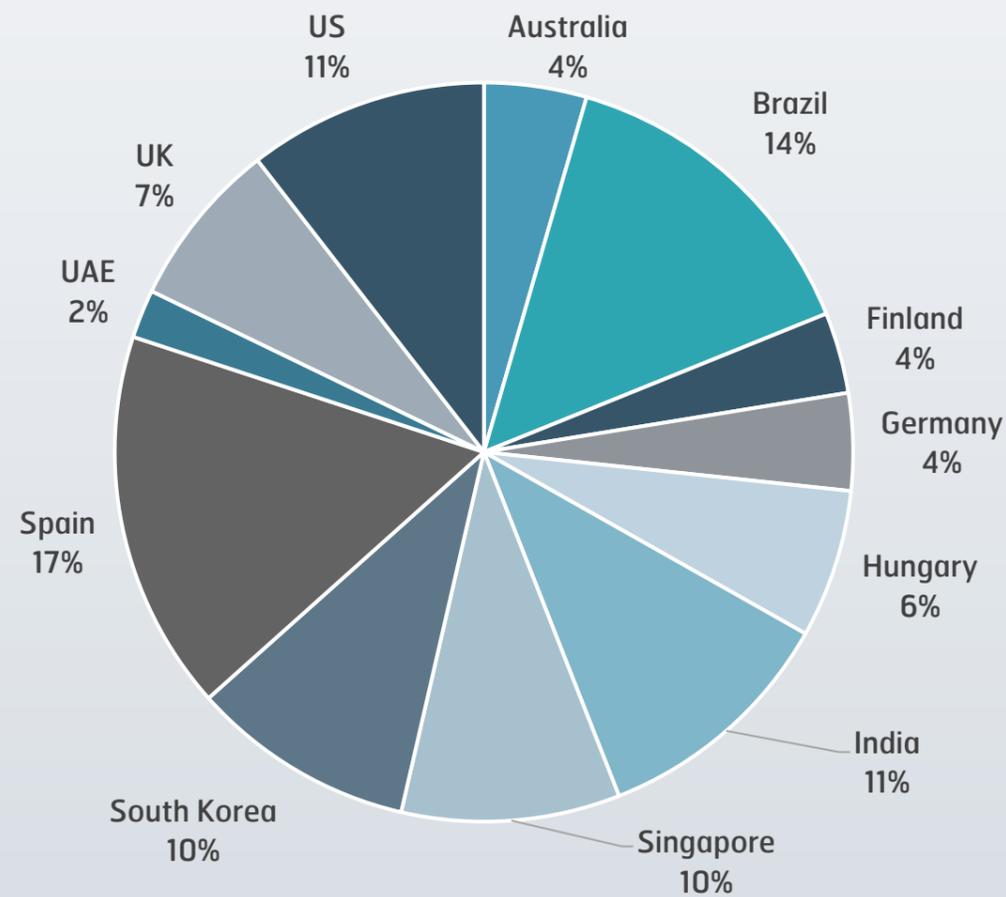


Fly with only specific airlines I trust

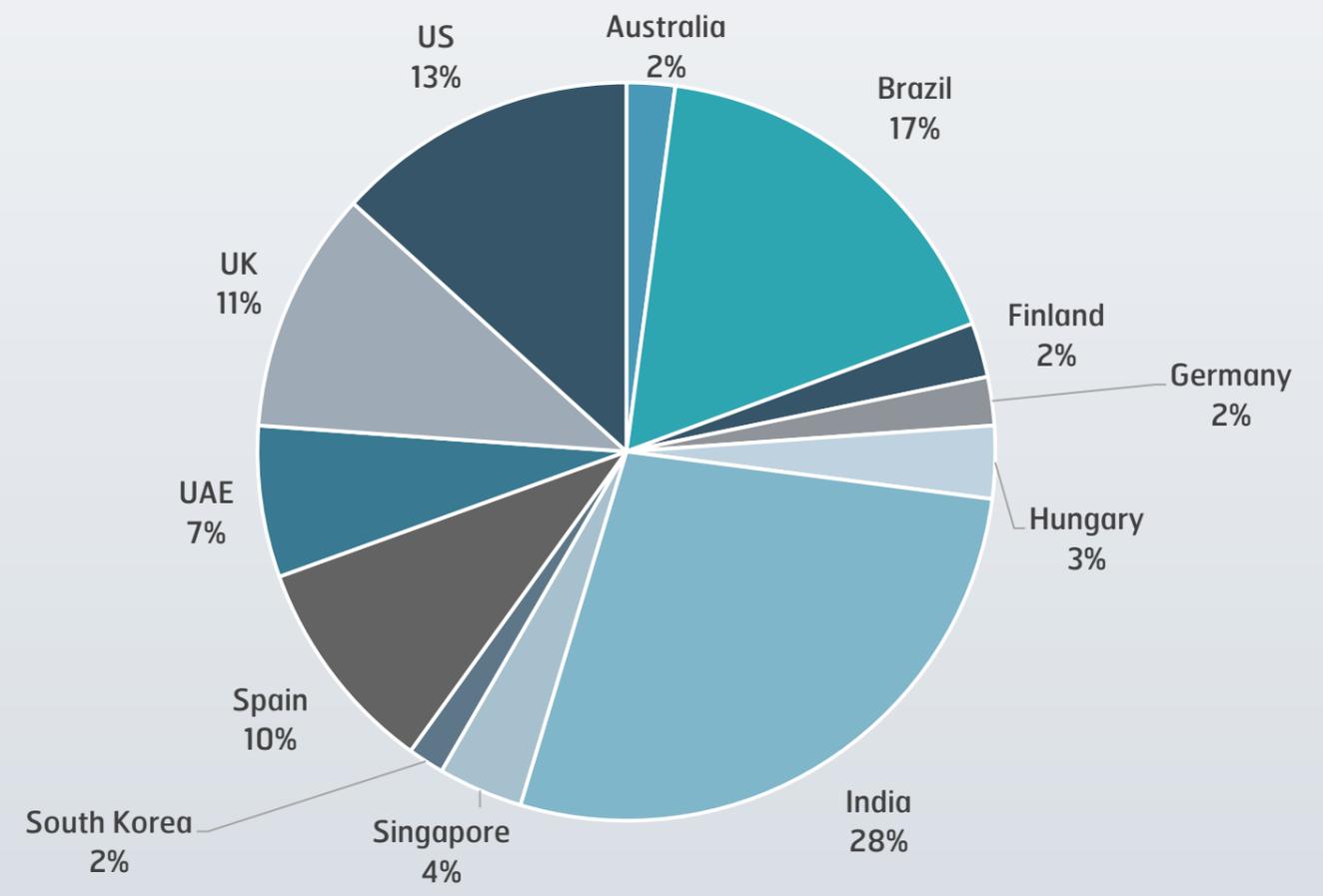


9 Traveler Profile Types

Highly Cautious

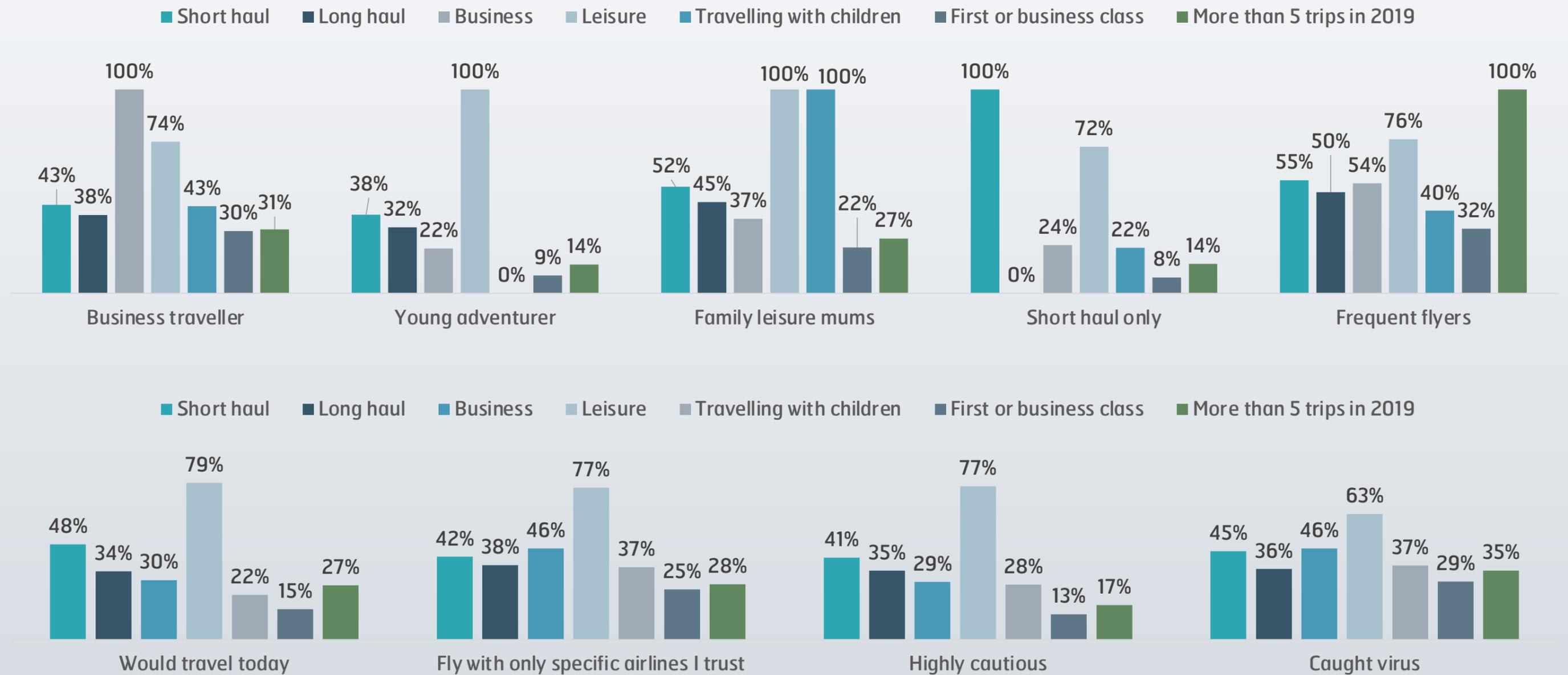


Caught the Virus



9 Traveler Profile Types

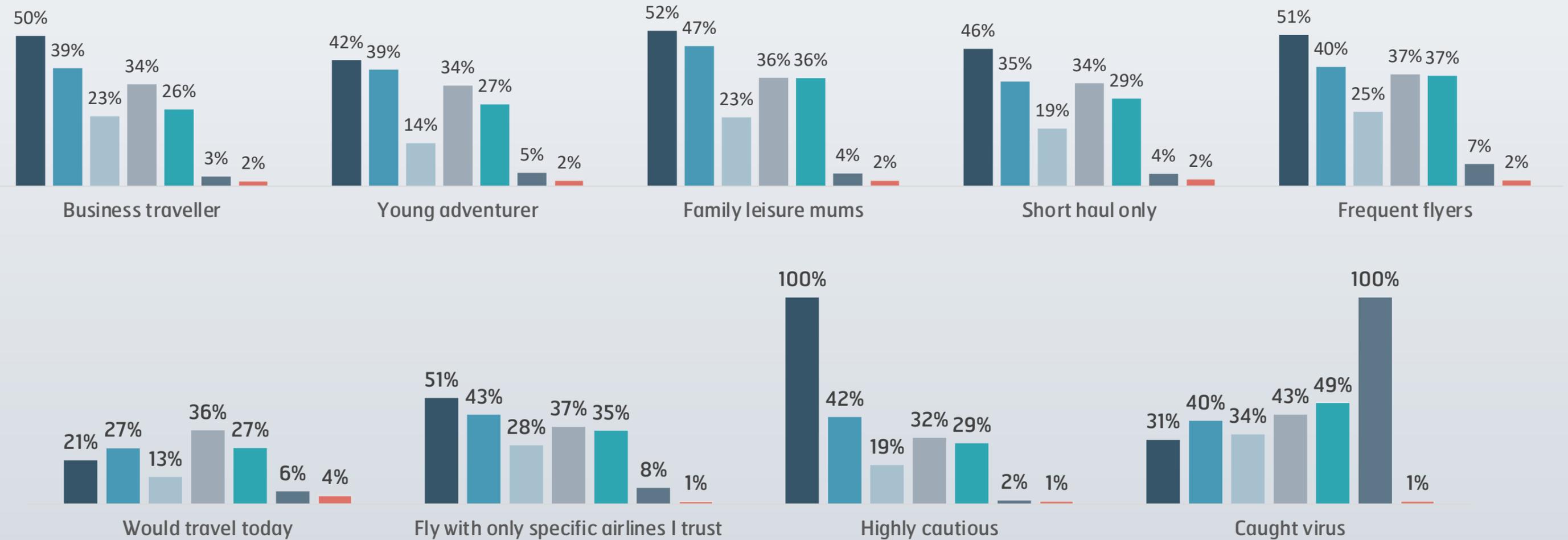
In 2019 before the pandemic, which of these air travel trips did you take?



9 Traveler Profile Types

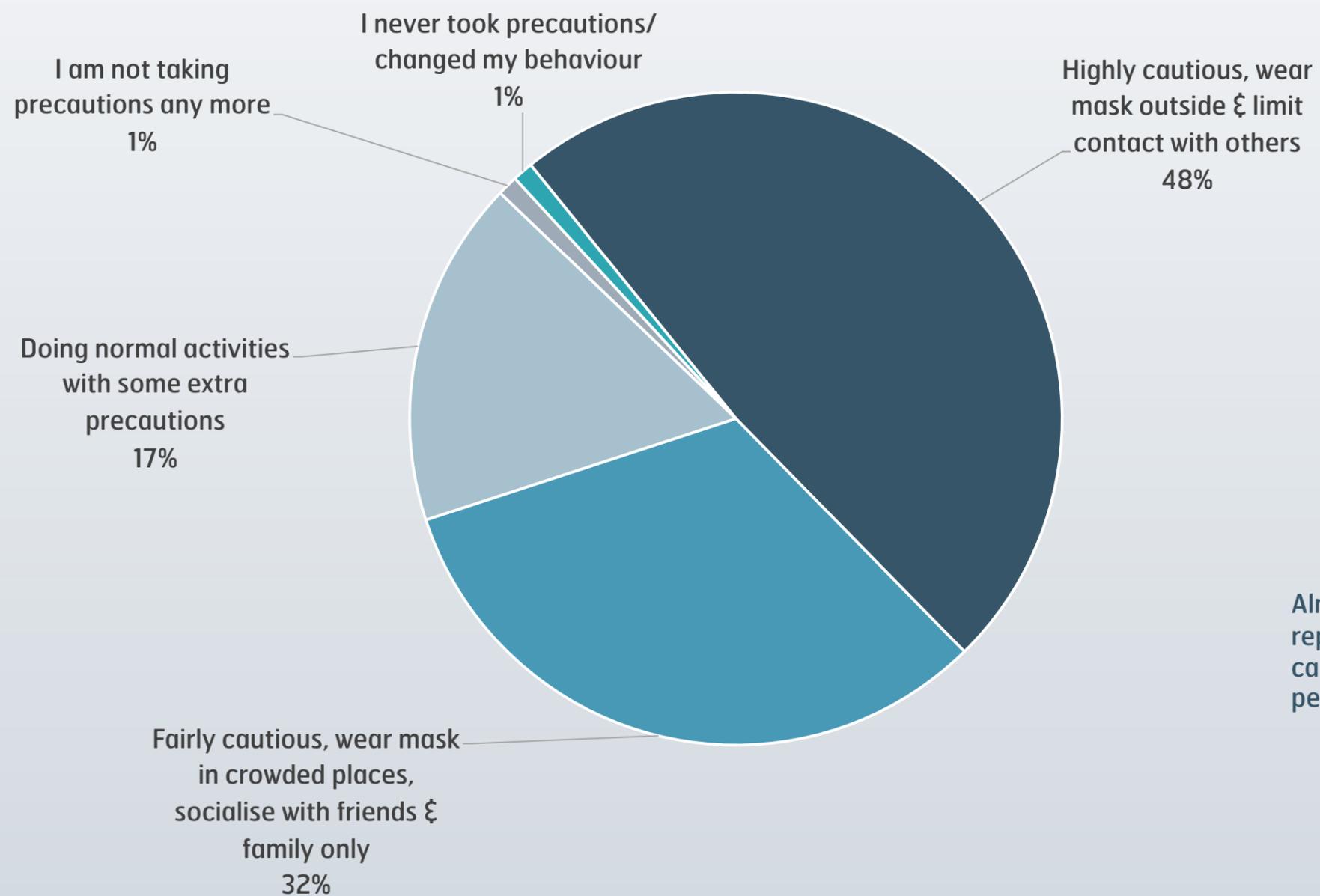
COVID Impact

- I'm worried about catching the virus even though I'm healthy now
- I'm worried about catching the virus because of an underlying health condition
- Someone I know caught the virus
- Other
- I'm worried about finances/ job
- My finances/ job have been affected
- I caught the virus



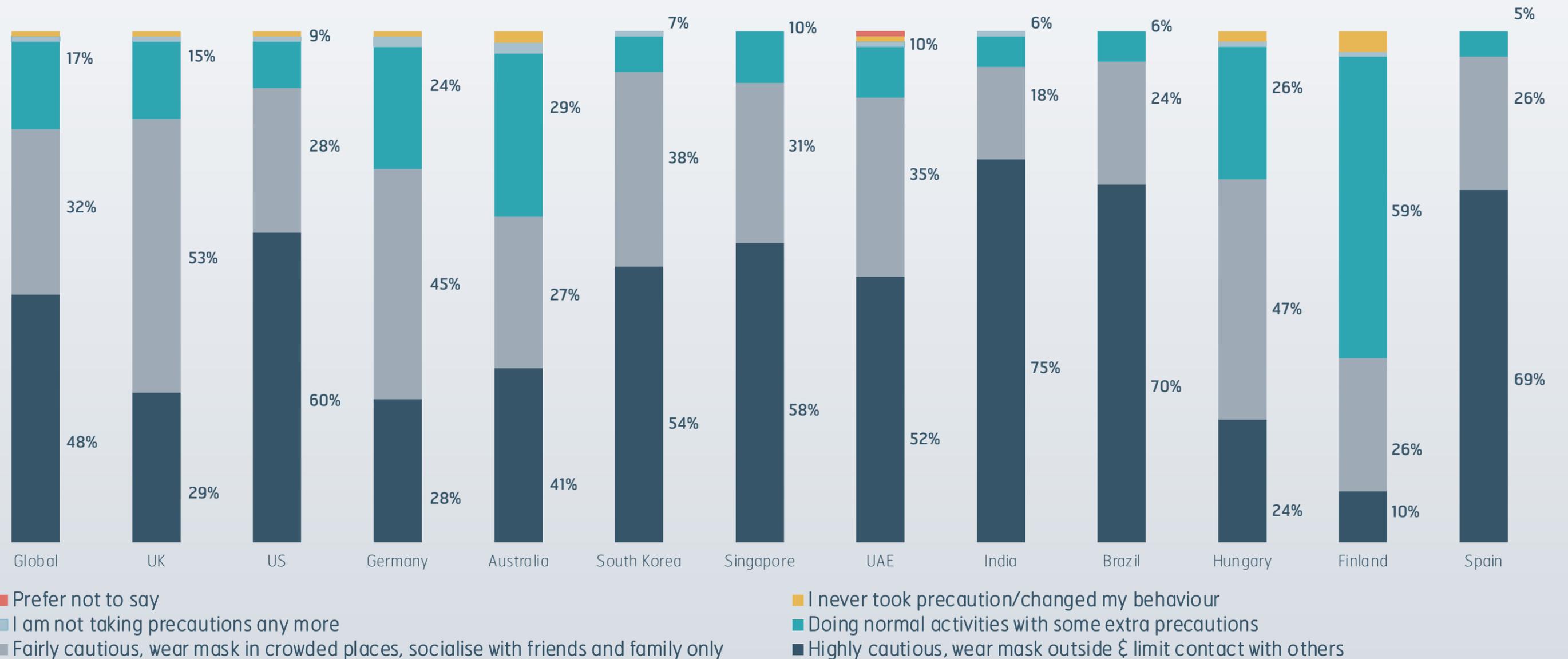
**Q1. Which of the following
best describes your
current behaviour to avoid
COVID-19?**

Q1. Which of the following best describes your current behaviour to avoid COVID-19?



Almost half of all respondents reported their behaviour as 'highly cautious' when it came to taking personal precautions.

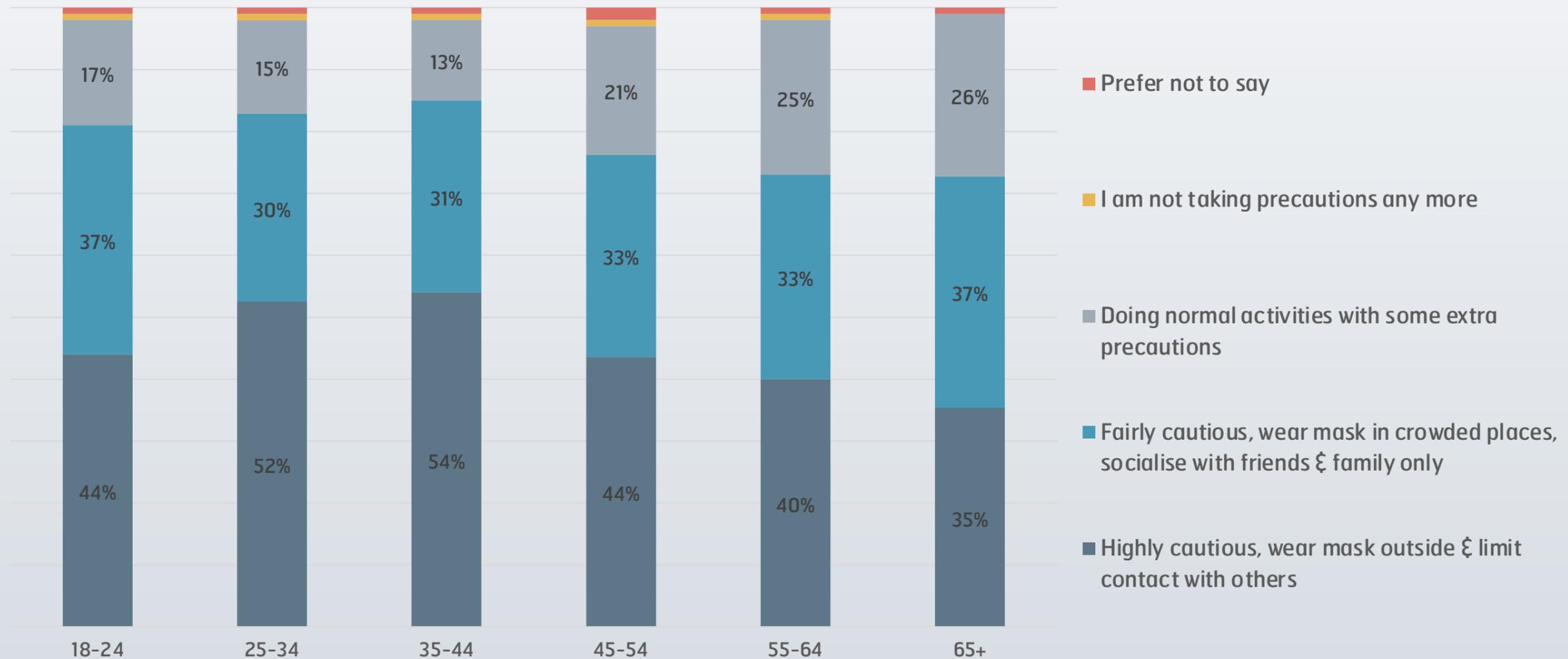
Q1. Which of the following best describes your current behavior to avoid COVID-19?



Passenger precaution levels appear to vary according to the impact the pandemic has had on their country.

Q1. Which of the following best describes your current behaviour to avoid COVID-19?

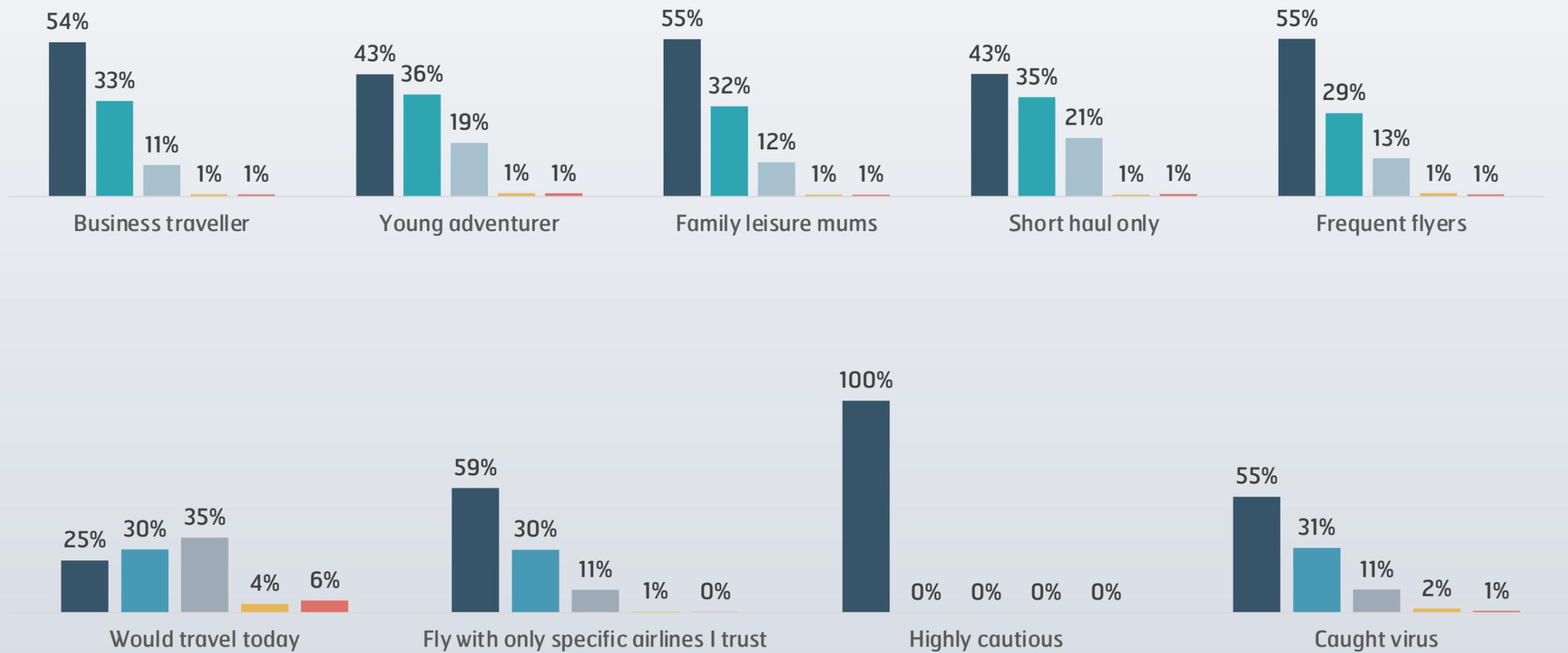
BY AGE



Over 80% of 25-44 year olds are still cautious about COVID-19

COVID precautions

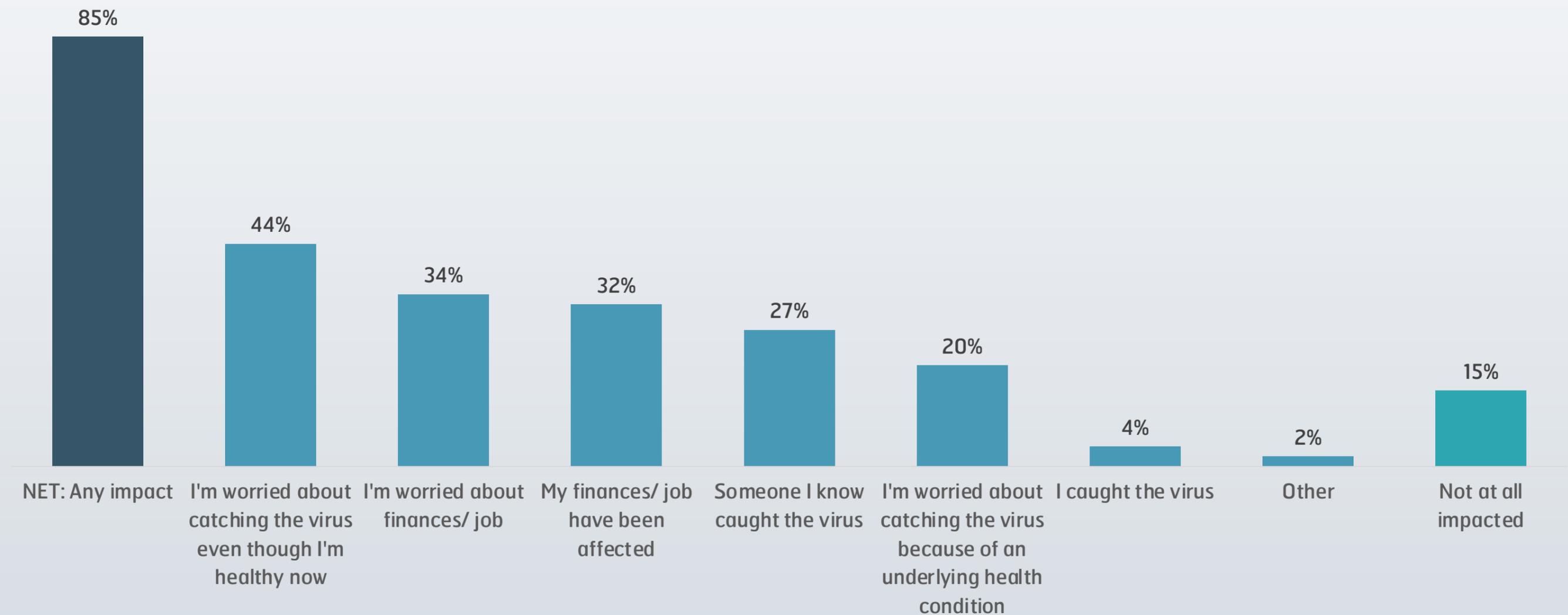
- Highly cautious, wear mask outside & limit contact with others
- Fairly cautious, wear mask in crowded places, socialise with friends & family only
- Doing normal activities with some extra precautions
- I am not taking precautions any more
- I never took precautions/ changed my behaviour



A quarter of passengers who are highly cautious, would still travel today.

Q2. How have you been impacted, if at all, by the COVID-19 pandemic?

Q2. How have you been impacted, if at all, by the COVID-19 pandemic?

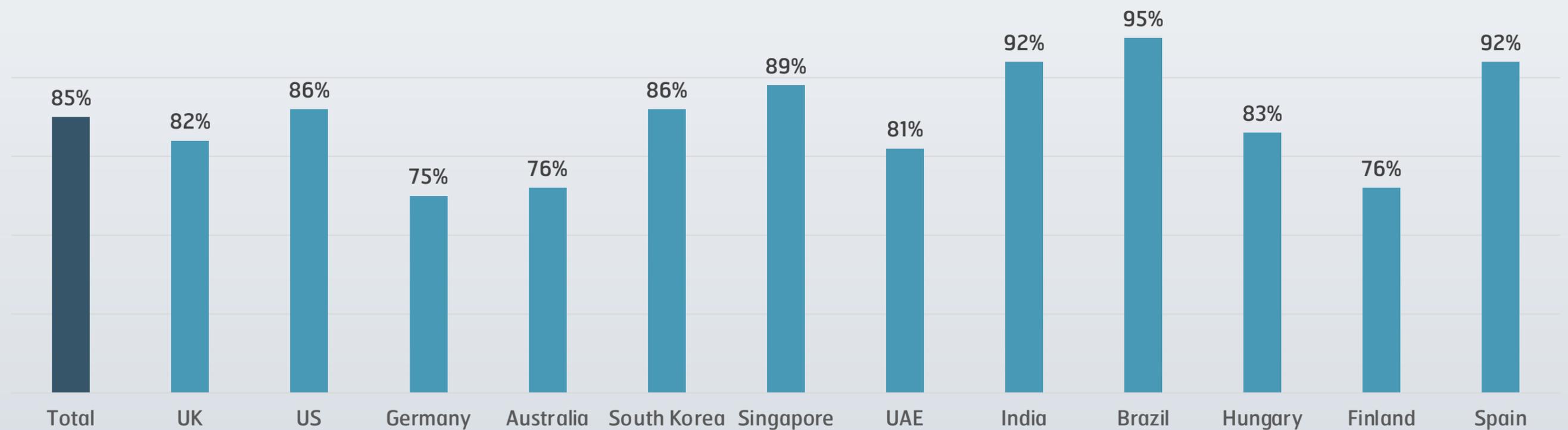


Anxiety over personal safety is more prevalent, but economic impact is the biggest experienced effect of the pandemic

Q2. How have you been impacted by the COVID-19 pandemic?

ANY IMPACT, BY COUNTRY

NET: Any impact

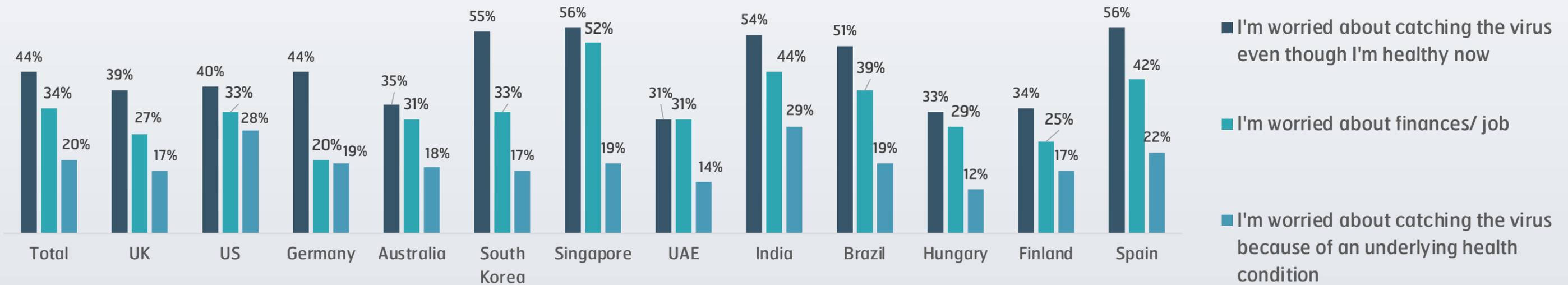


85% of all passengers surveyed have been impacted by the COVID-19 pandemic

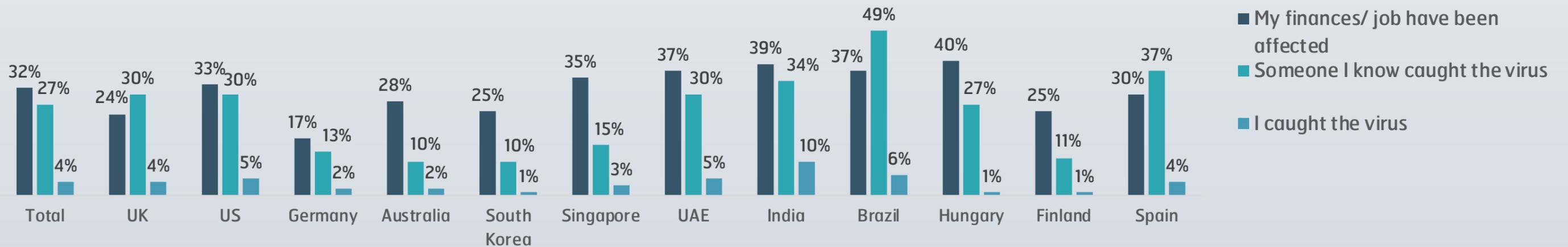
Q2. How have you been impacted by the COVID-19 pandemic?

WORRY VS. ACTUAL IMPACT, BY COUNTRY

'Worried' about impact

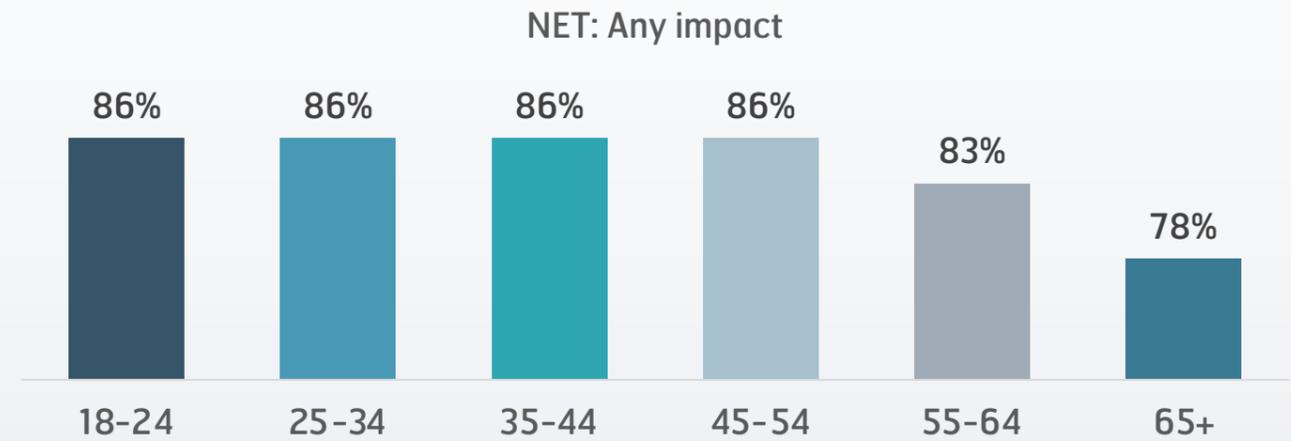


Actual impact experienced



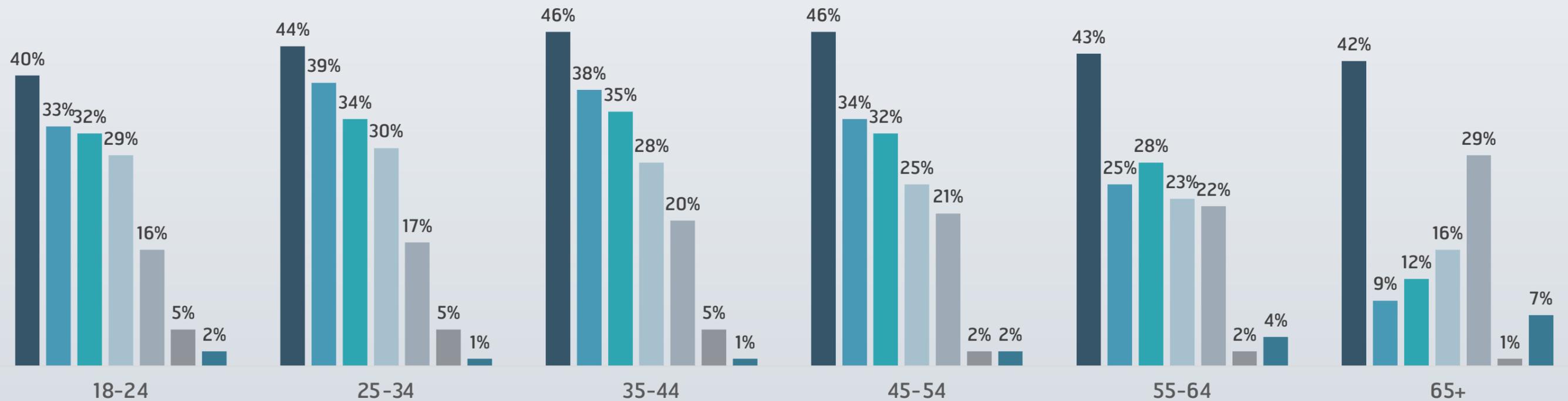
Q2. How have you been impacted by the COVID-19 pandemic?

BY AGE



- I'm worried about catching the virus even though I'm healthy now
- My finances/ job have been affected
- I'm worried about catching the virus because of an underlying health condition
- Other

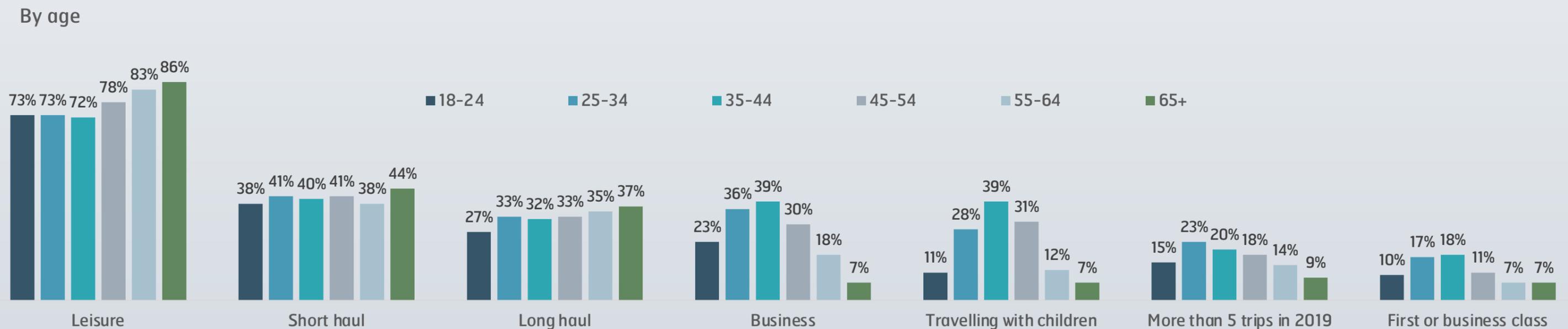
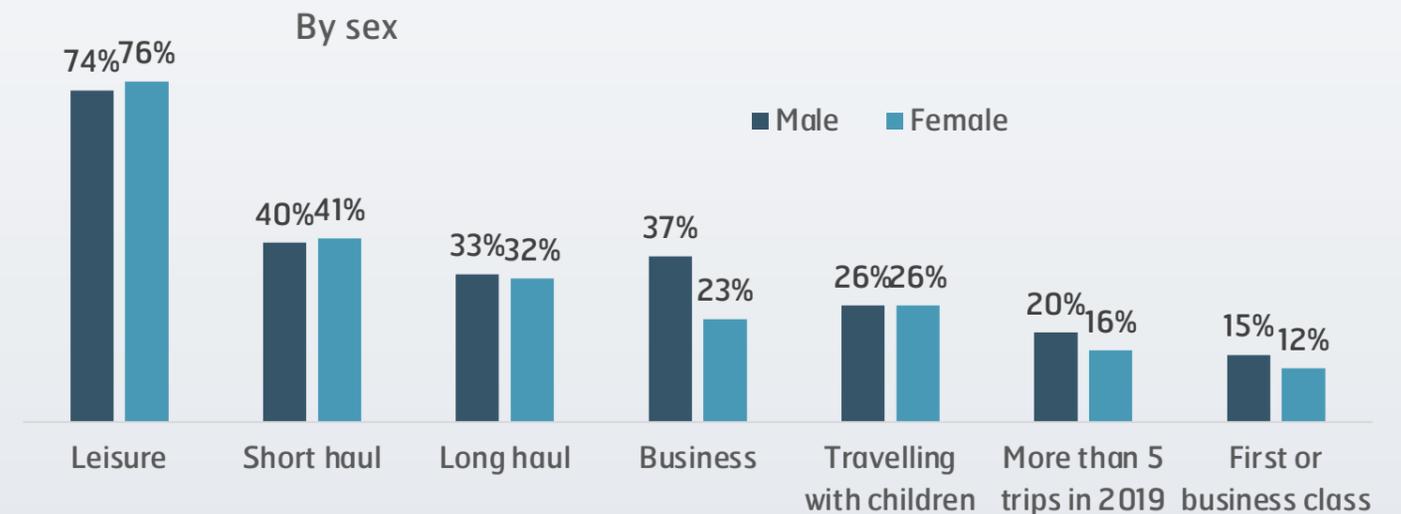
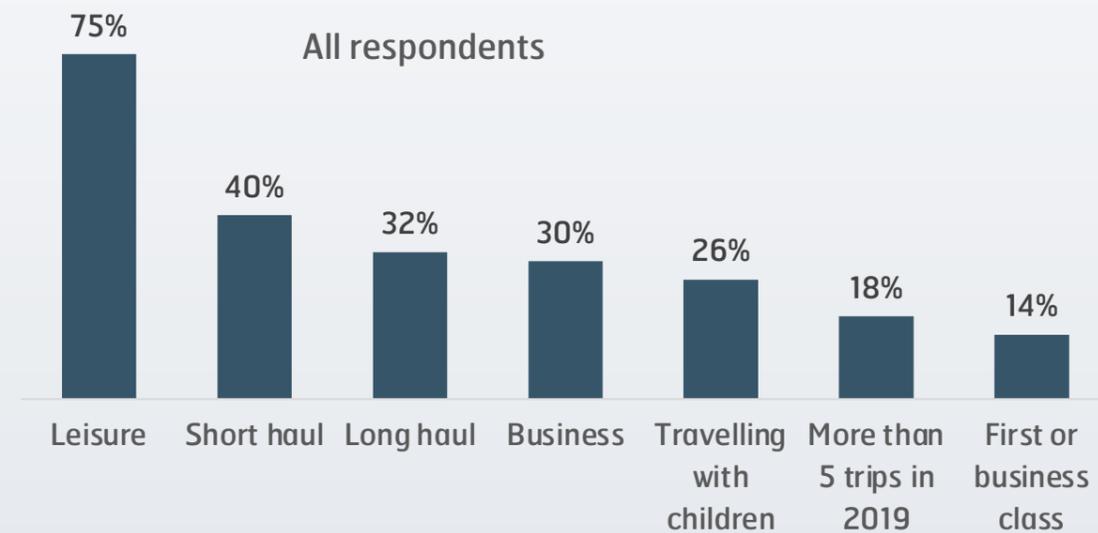
- I'm worried about finances/ job
- Someone I know caught the virus
- I caught the virus



Apart from catching the virus, worries about personal finances and job security are a top concern.

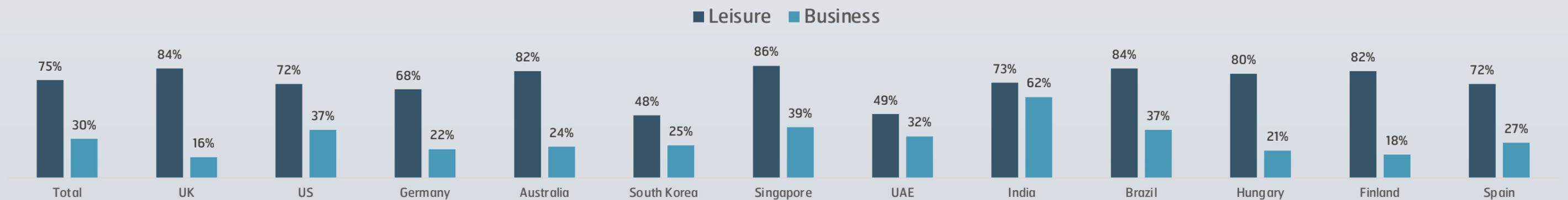
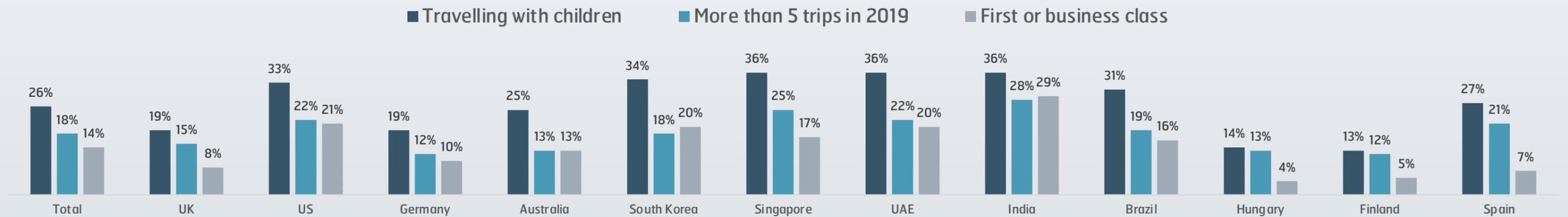
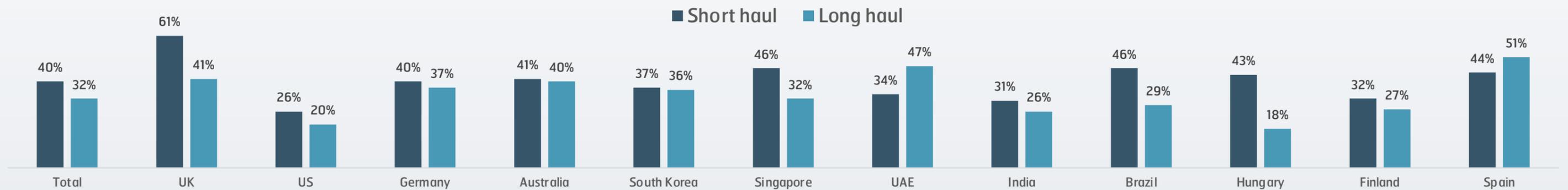
Q3. In 2019 before the pandemic, which of these types of air travel trips did you take?

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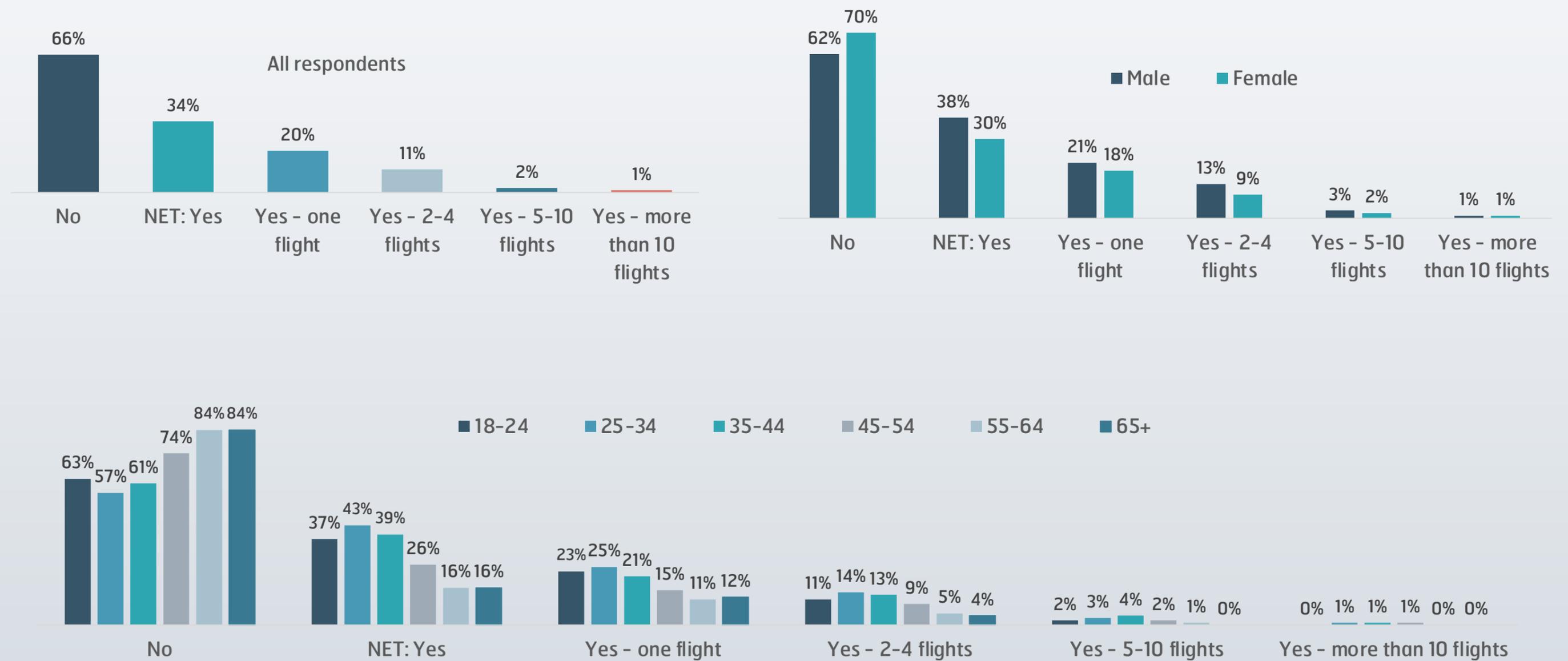
Before the pandemic, 75% of passengers were travelling for leisure

Q3. In 2019 before the pandemic, which of these types of air travel trips did you take?



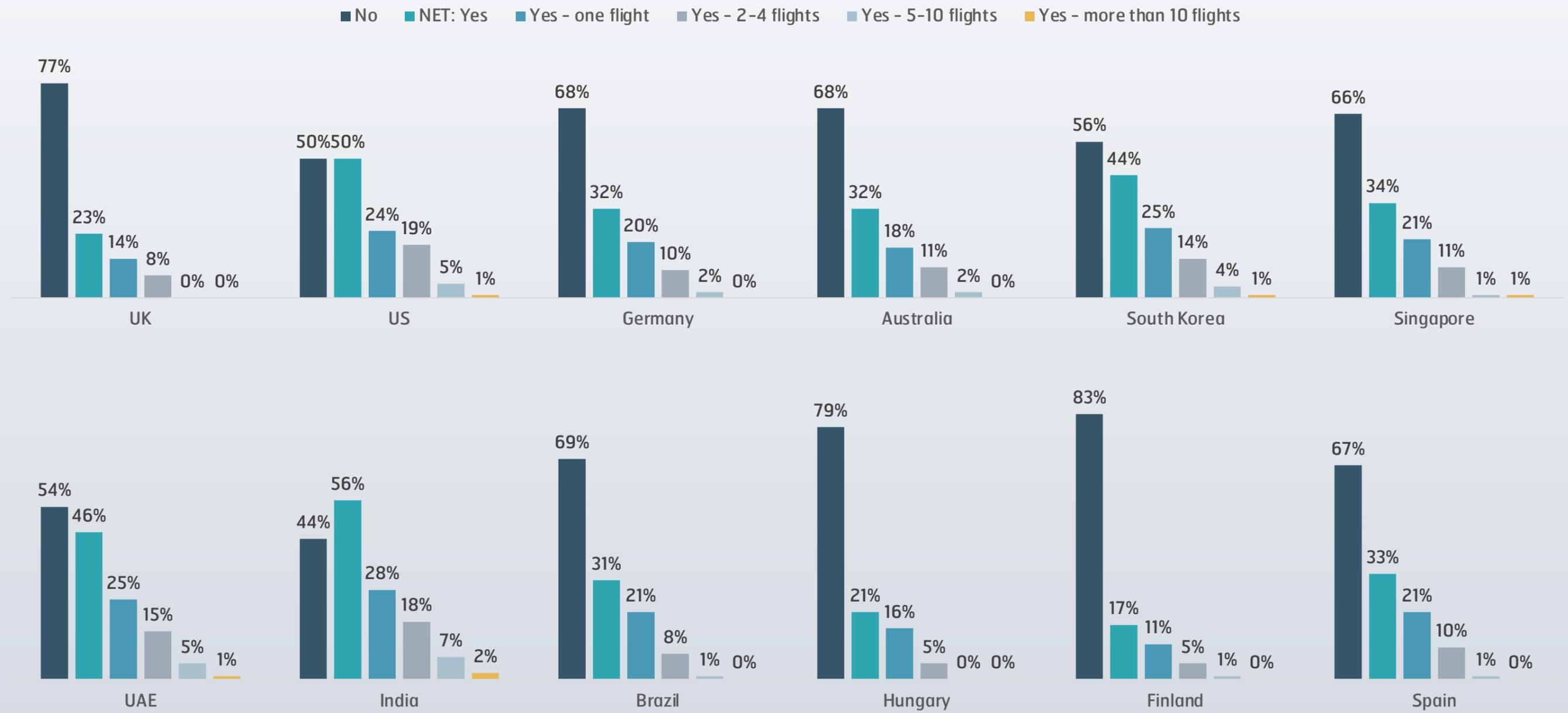
**Q4. Have you taken any
airline flights in 2020
since the pandemic
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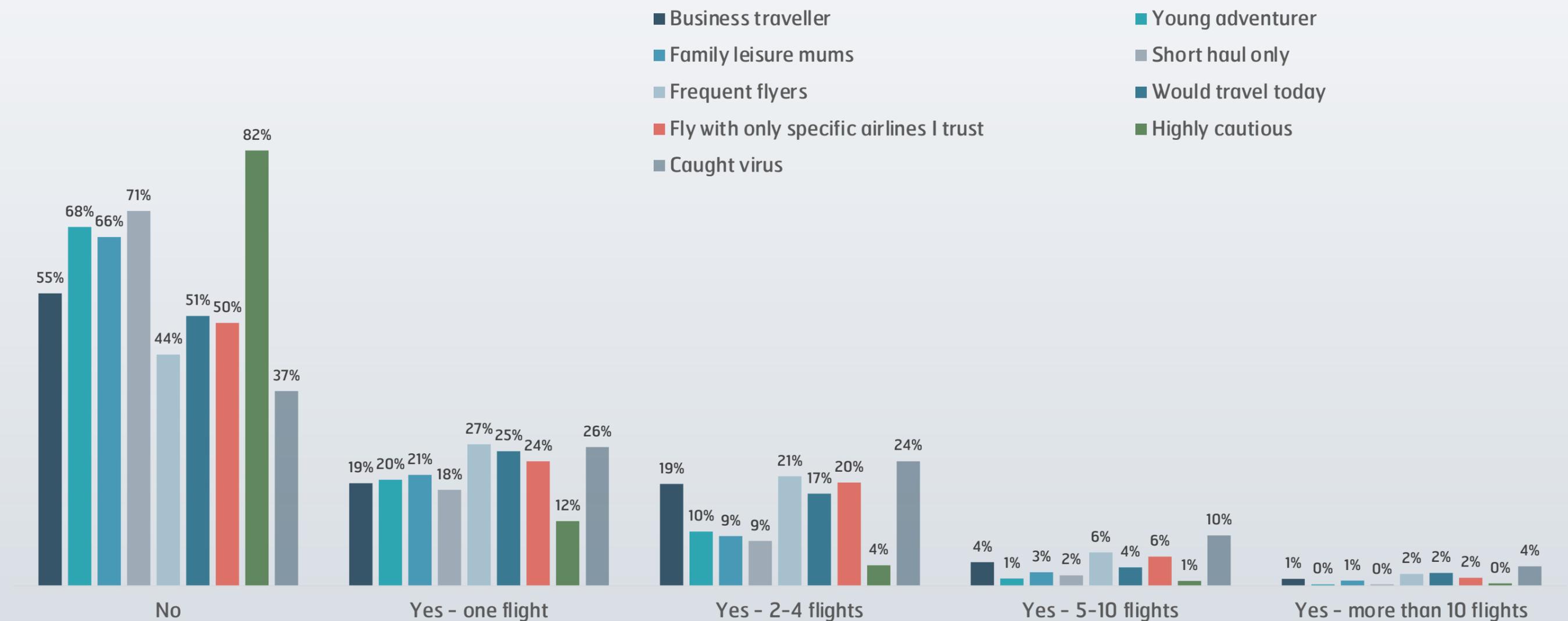
A third of respondents have taken at least one flight in 2020.

Q4. Have you taken any airline flights in 2020 since the pandemic reached your country?



Citizens in the US, India and UAE have taken the most flights this year.

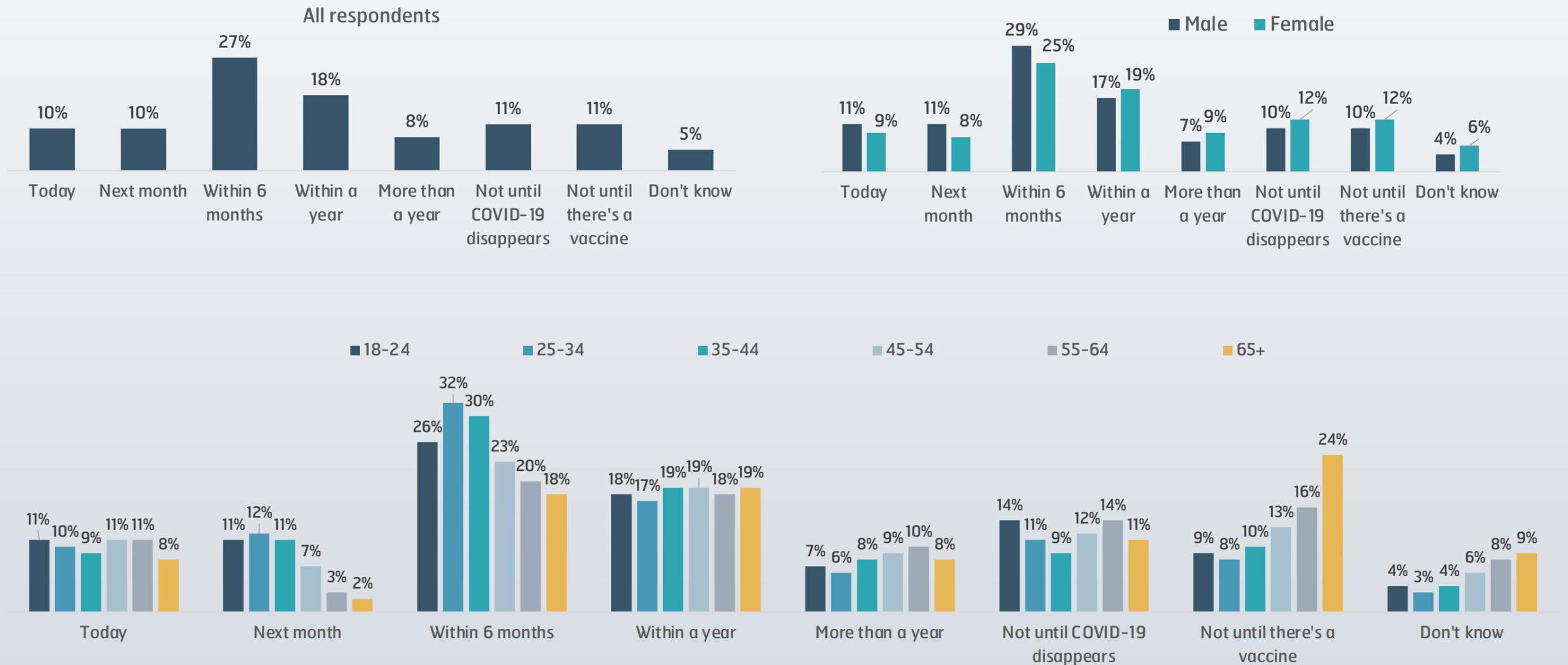
Q4. Have you taken any airline flights in 2020 since the pandemic reached your country?



82% of passengers who are highly cautious have not taken a flight this year.

Q5. When would you be confident to take your next flight?

Q5. When would you be confident to take your next flight?



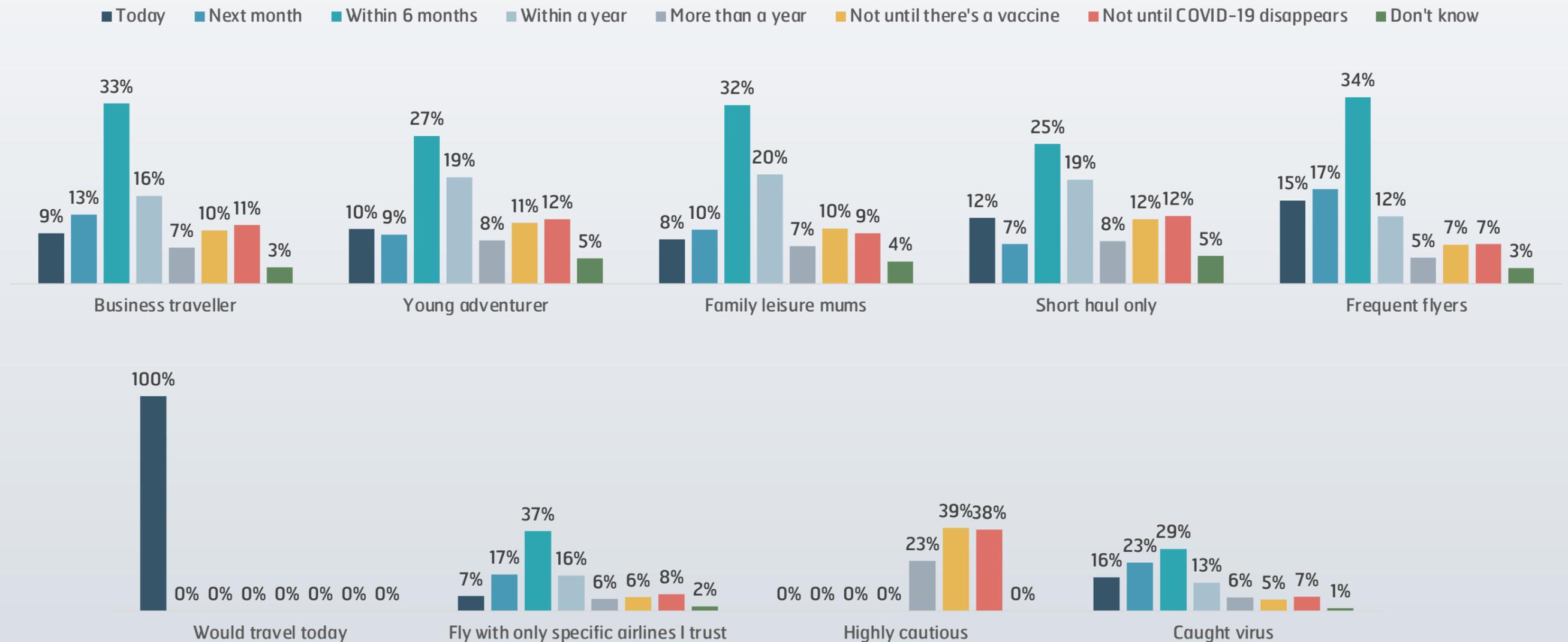
Almost half of travellers (47%) feel confident about flying within the next six months.

Q5. When would you be confident to take your next flight?



Hungarian and British passengers are most confident, with 26% and 16% respectively saying they would get on a flight today.

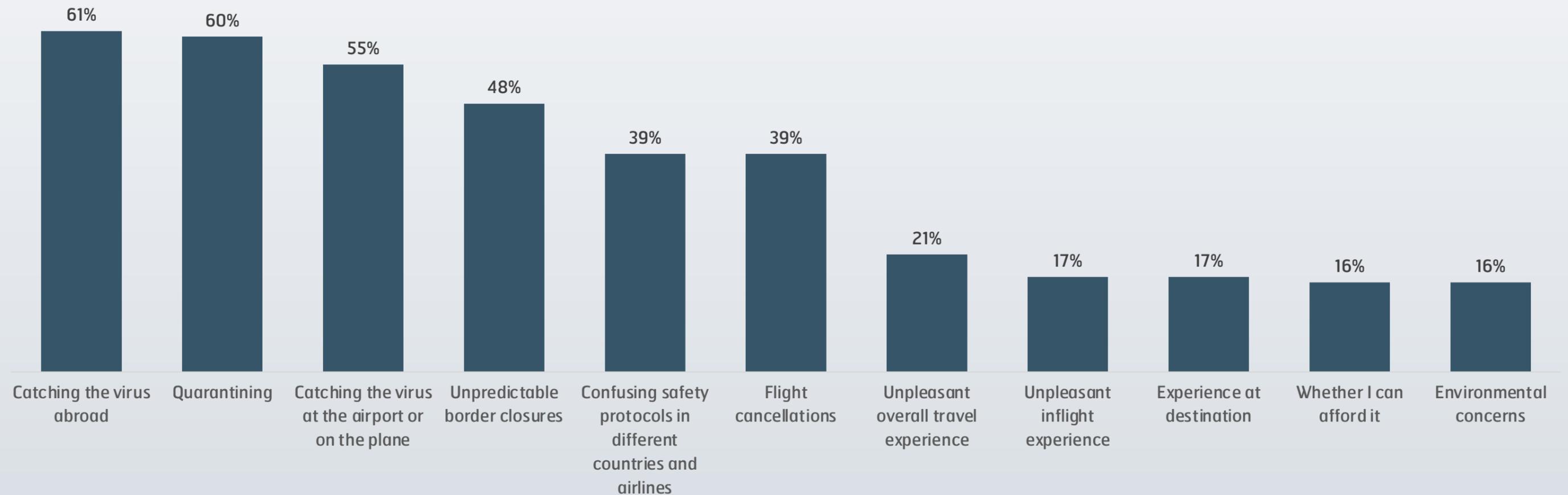
Q5. When would you be confident to take your next flight?



Frequent flyers feel the most confident, with 32% happy to fly today or within the next month.

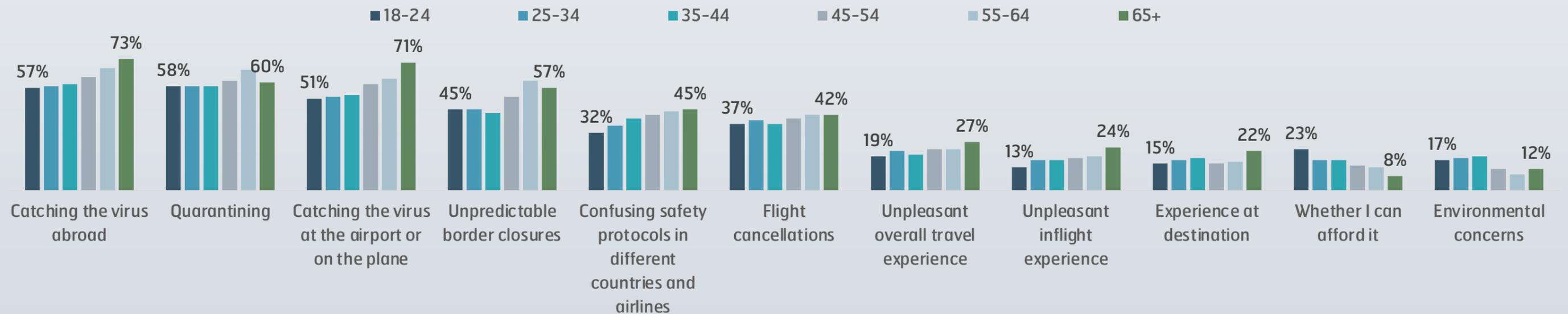
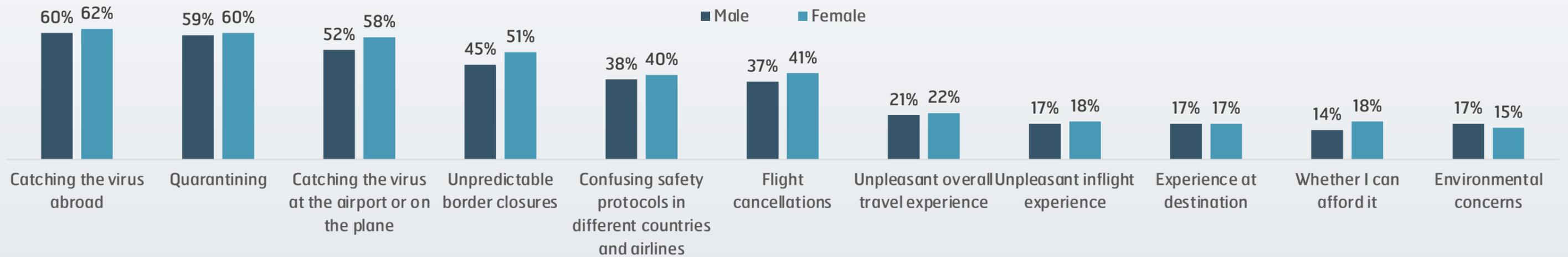
Q6. What are your main worries that prevent you from travelling abroad right now?

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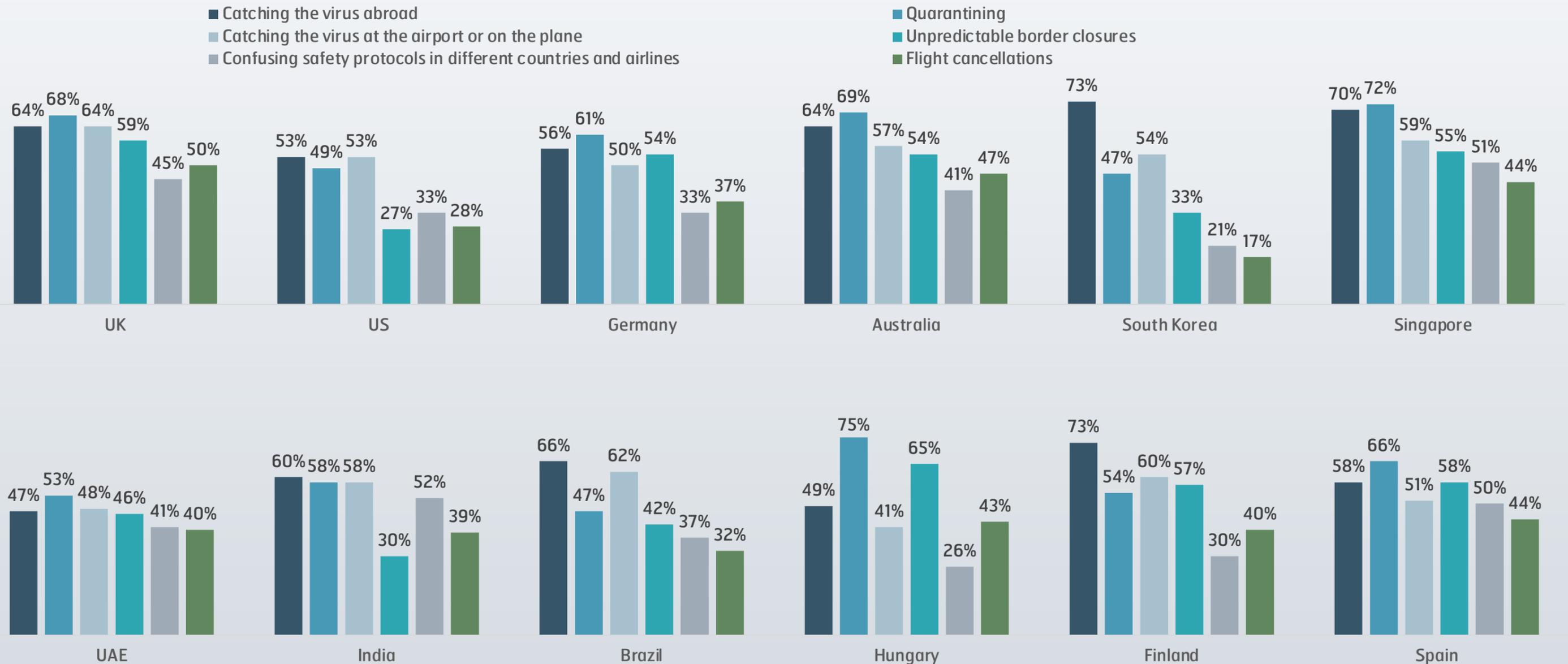
61% are more worried about catching the virus abroad, versus 55% worried about catching it on the plane.

Q6. What are your main worries that prevent you from travelling abroad right now?



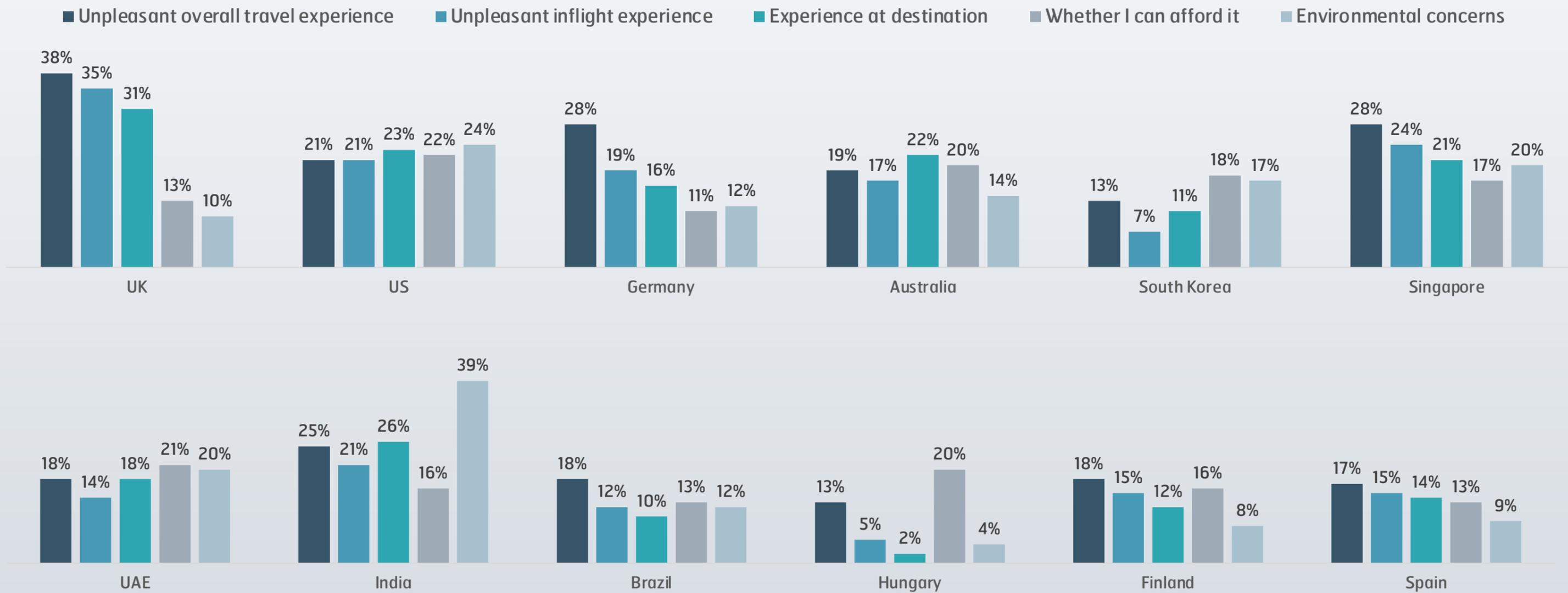
Affordability is a main concern for those aged 18-24, with almost a quarter referring to it as an issue.

Q6. What are your main worries that prevent you from travelling abroad right now?



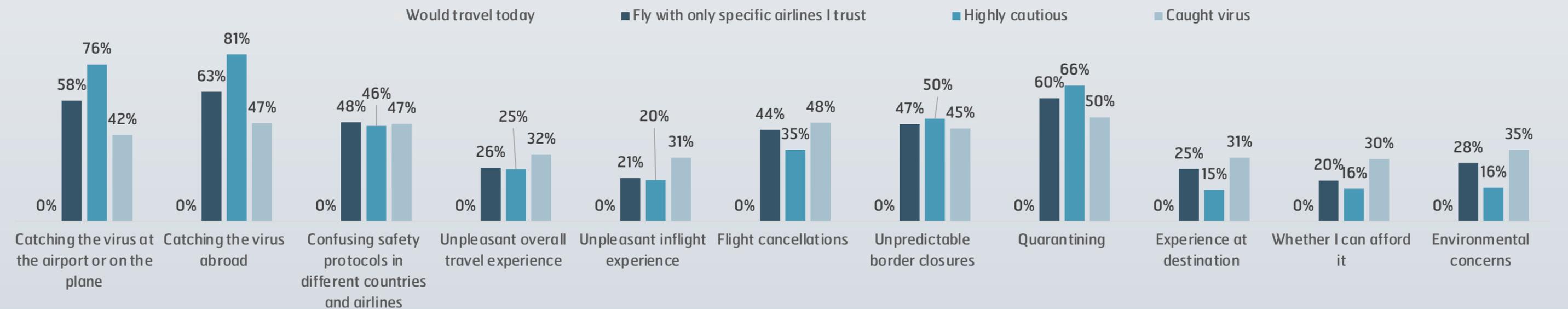
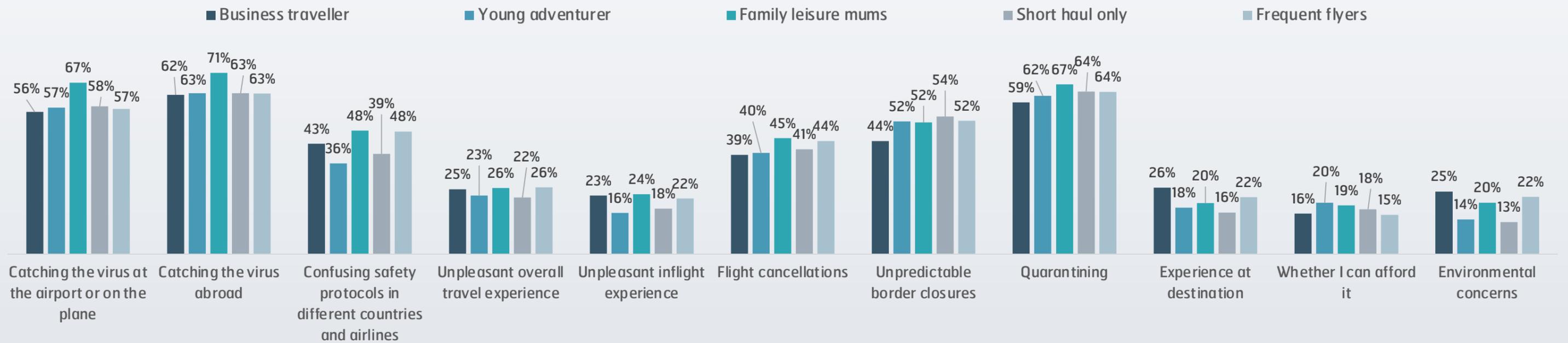
Catching the virus and unpredictable border closures is a number one worry across various regions.

Q6. What are your main worries that prevent you from travelling abroad right now?



Despite the pandemic, environmental concerns around flying is the main worry for those surveyed in India.

Q6. What are your main worries that prevent you from travelling abroad right now?

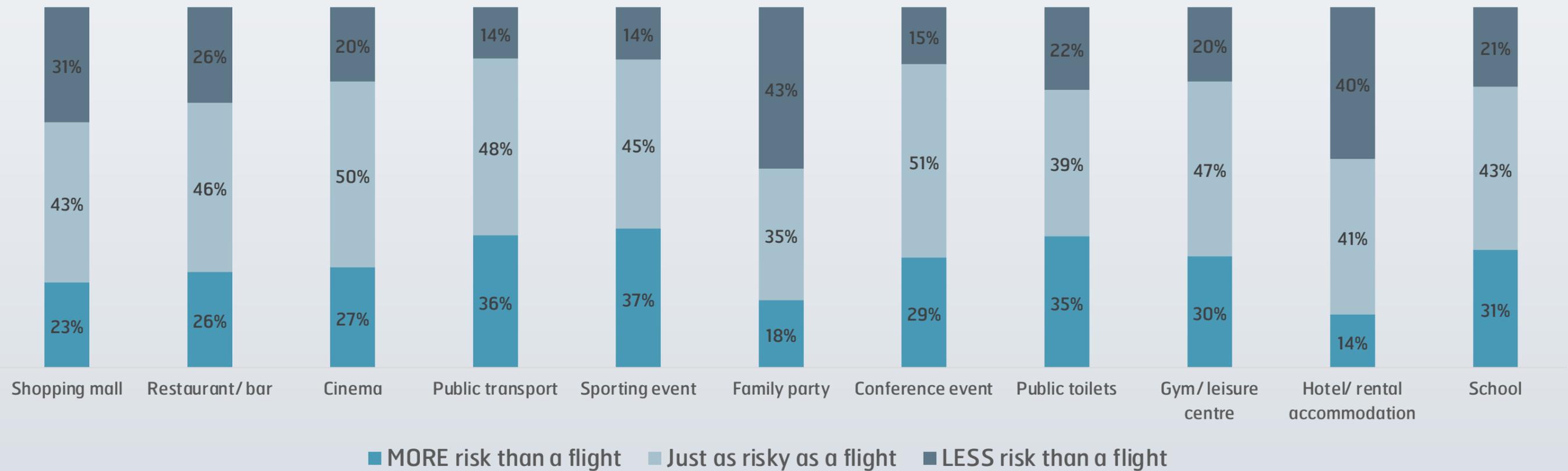


Passengers who are highly cautious are most worried about catching the virus on the airport, plane or abroad.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

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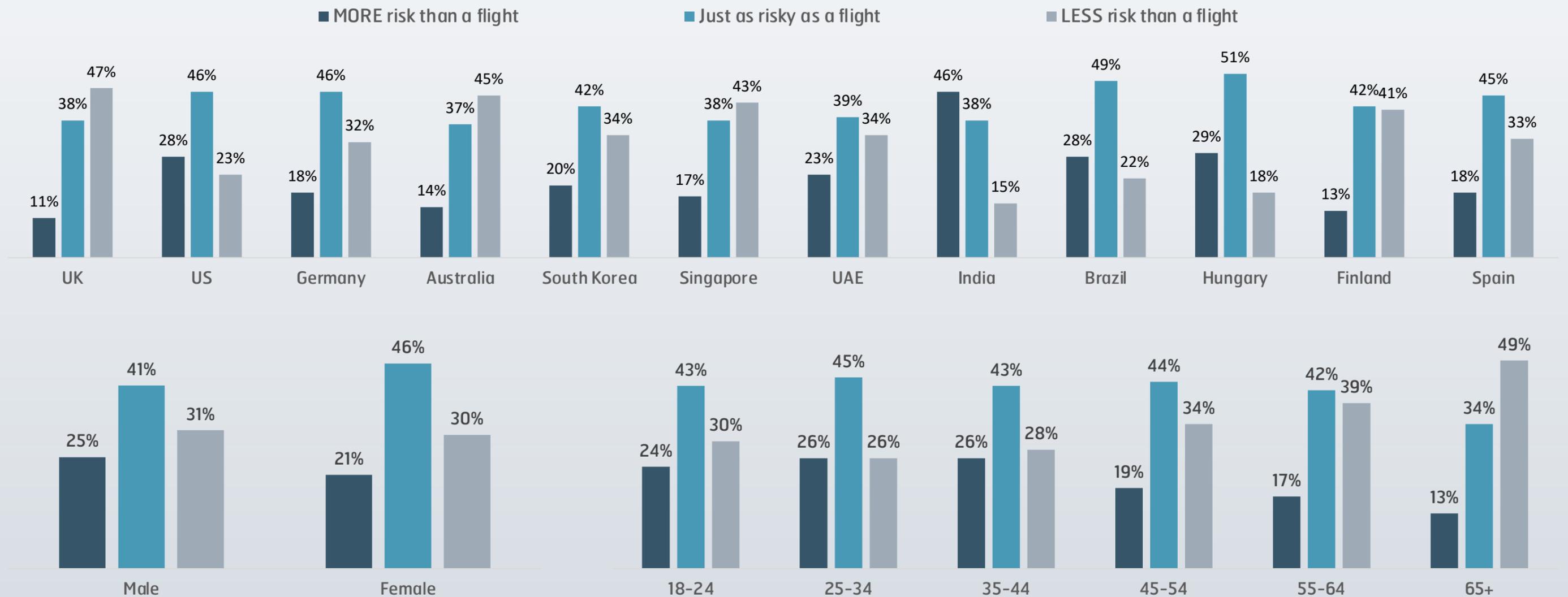
All respondents



There are significant regional variations in the perceived risk of different social activities compared to taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

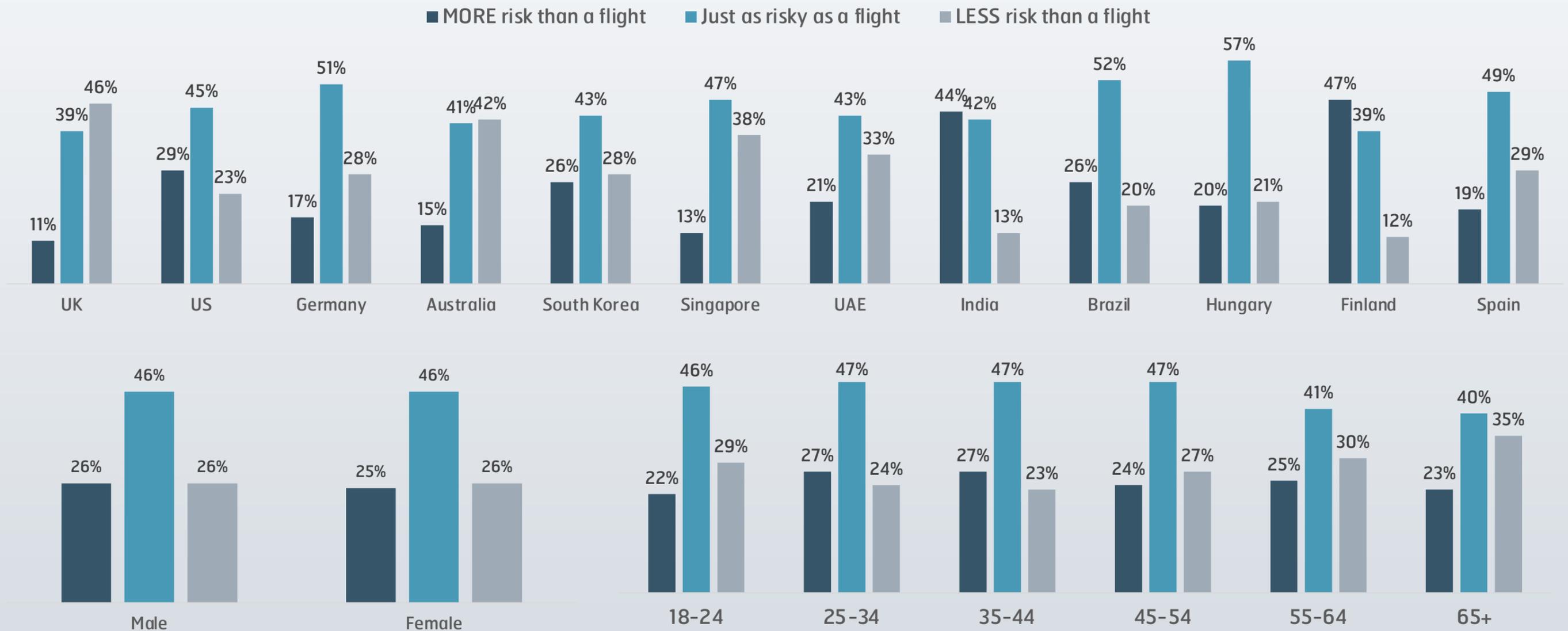
Shopping Mall



47% of those surveyed in the UK believe the shopping mall is less risky than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

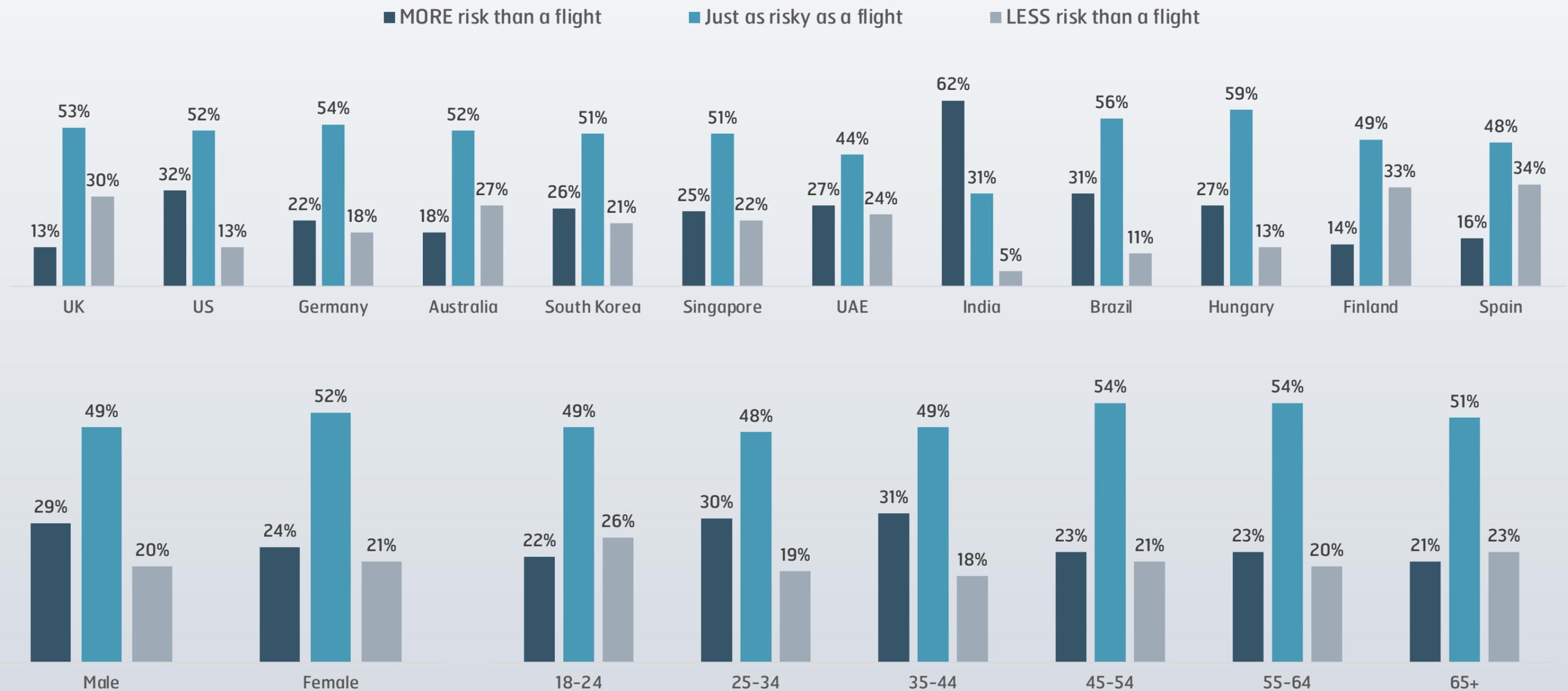
Restaurant/Bar



Almost half (47%) of those surveyed in Finland believe a restaurant or bar is more risky than taking a flight

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

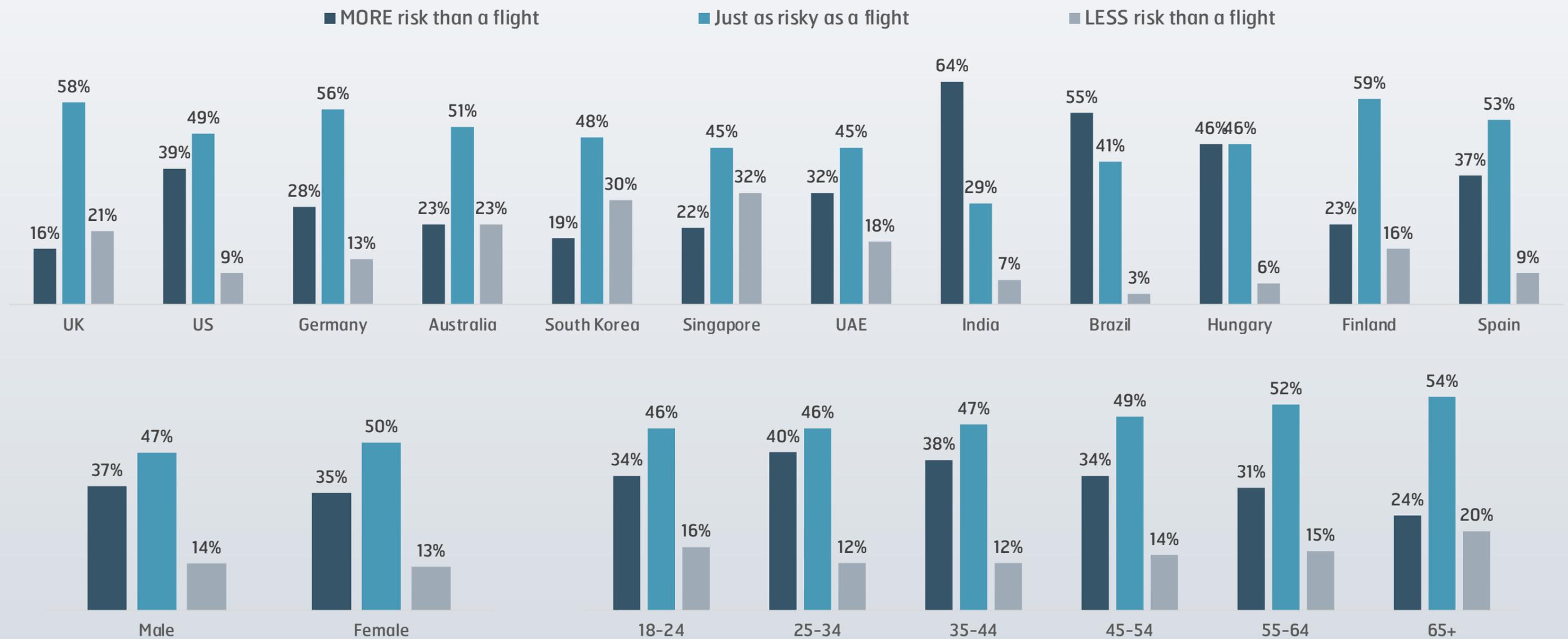
Cinema



62% of people in India consider going to the cinema more risk than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

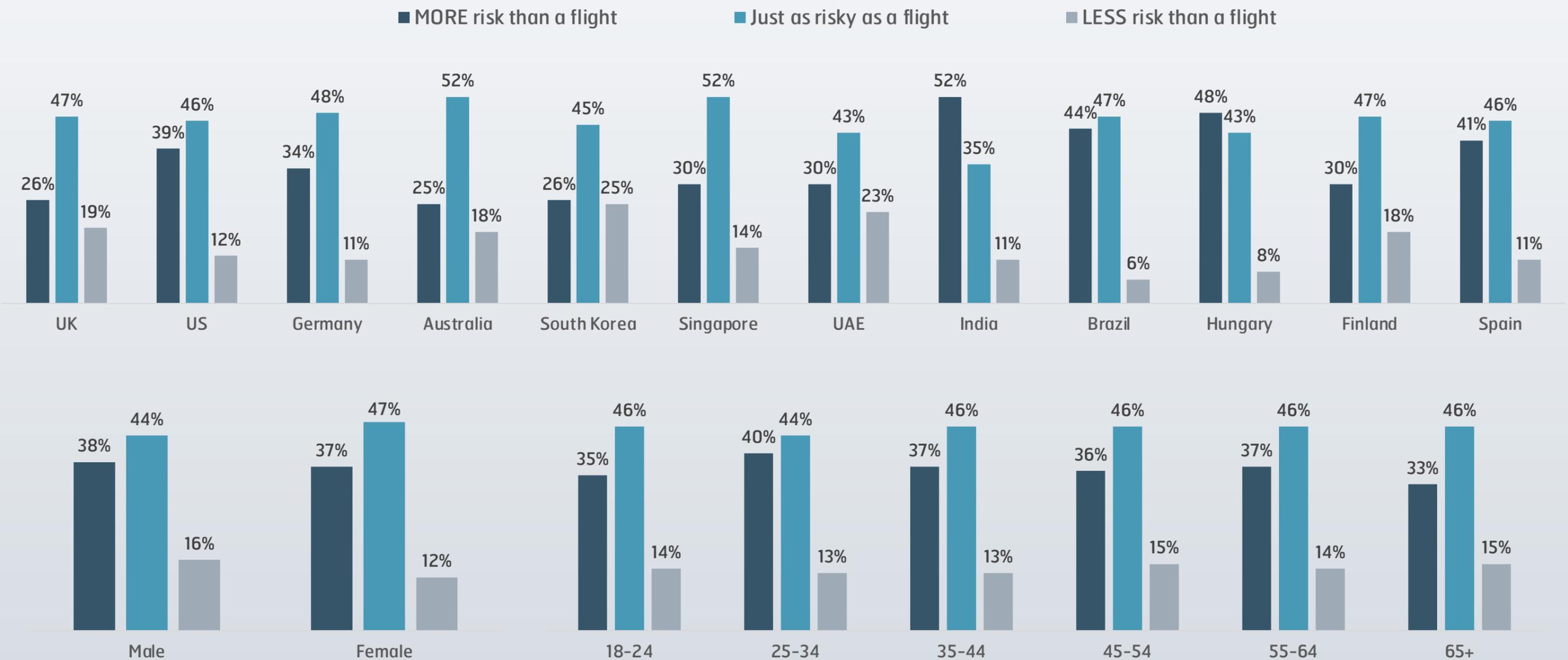
Public Transport



In Brazil, 96% believe taking public transport is just as risky or more risky than taking a flight

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

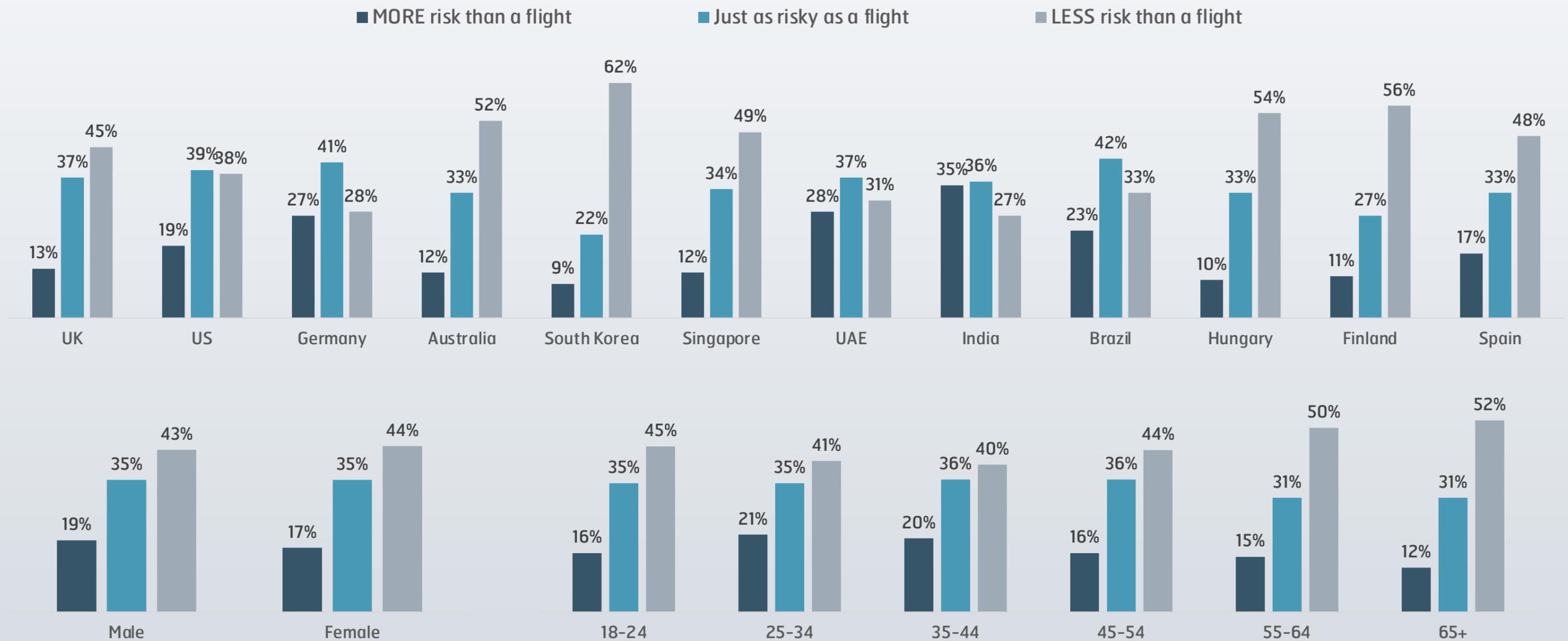
Sporting Event



25% of passengers in South Korea think attending a sporting event is less risk than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

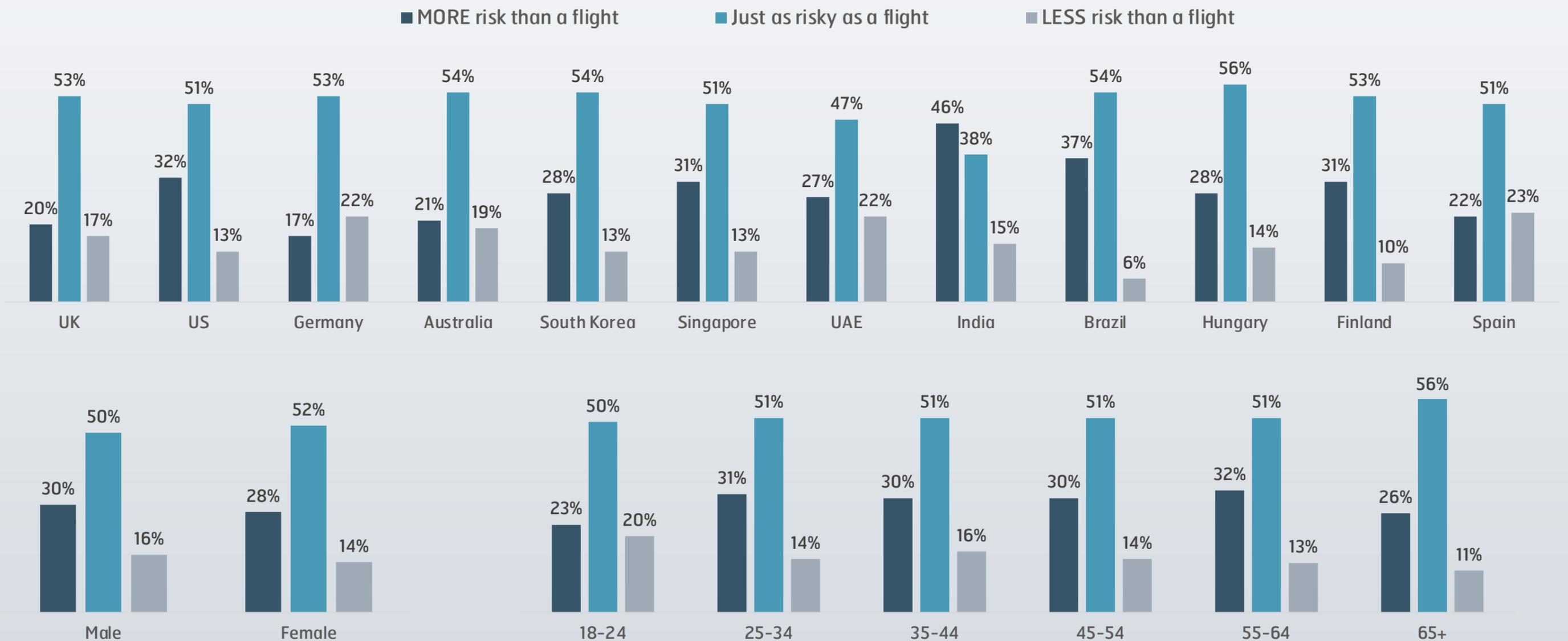
Family Party



43% believe a family party is less risky than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

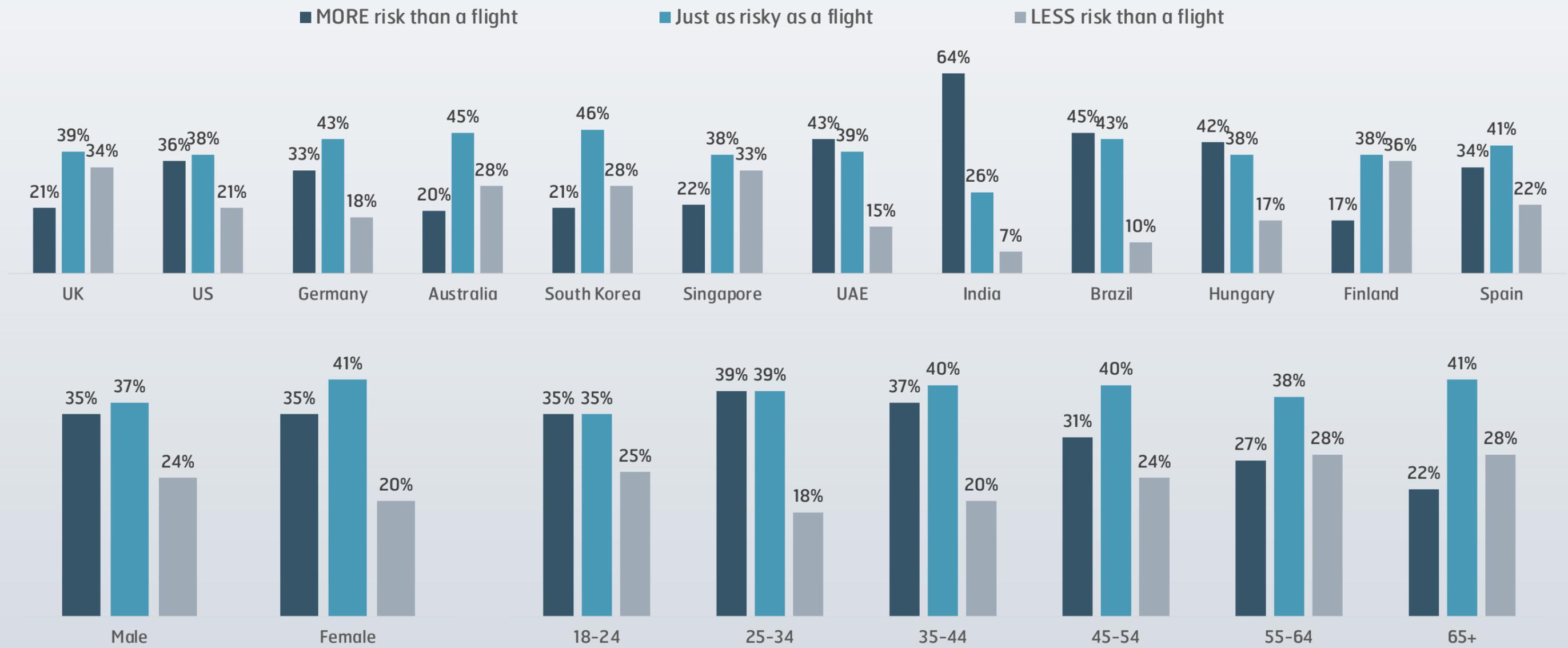
Conference Event



Across most regions, around half of those surveyed believe a conference event is just as risky as taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

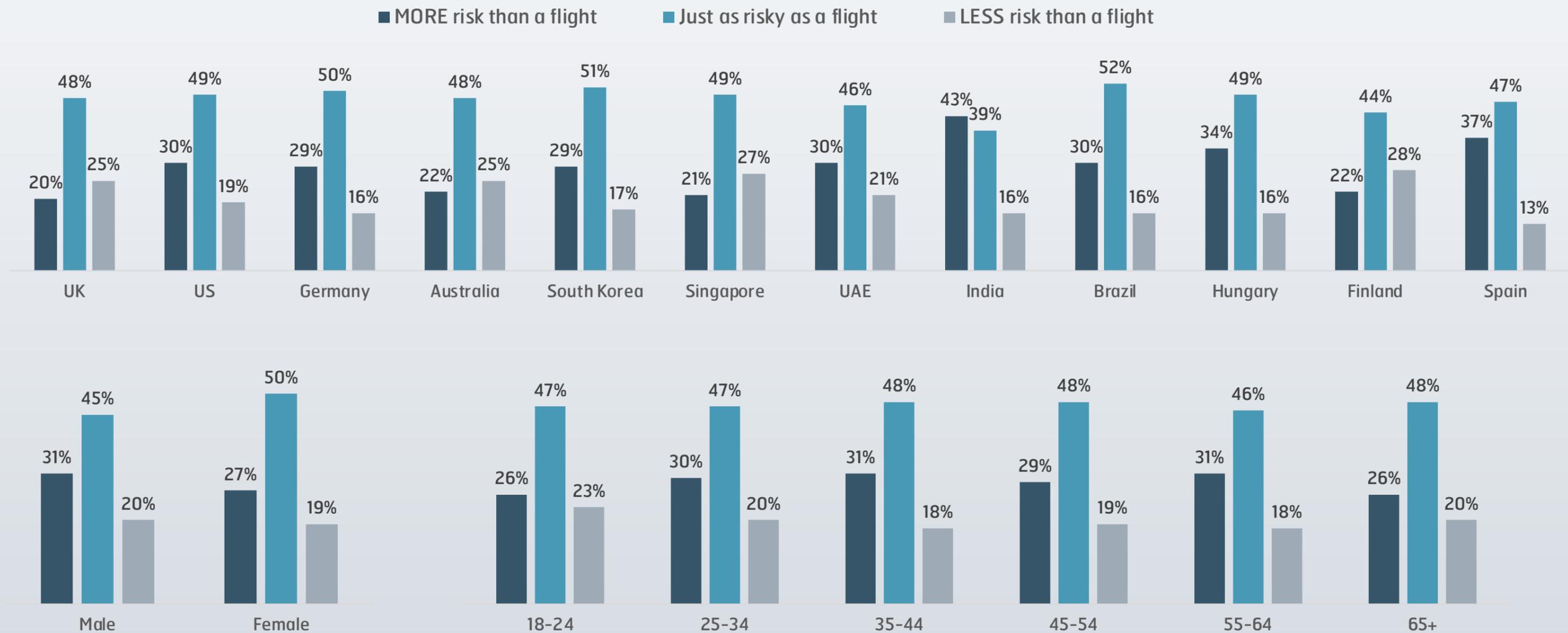
Public Toilets



64% in India believe public toilets present more risk than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

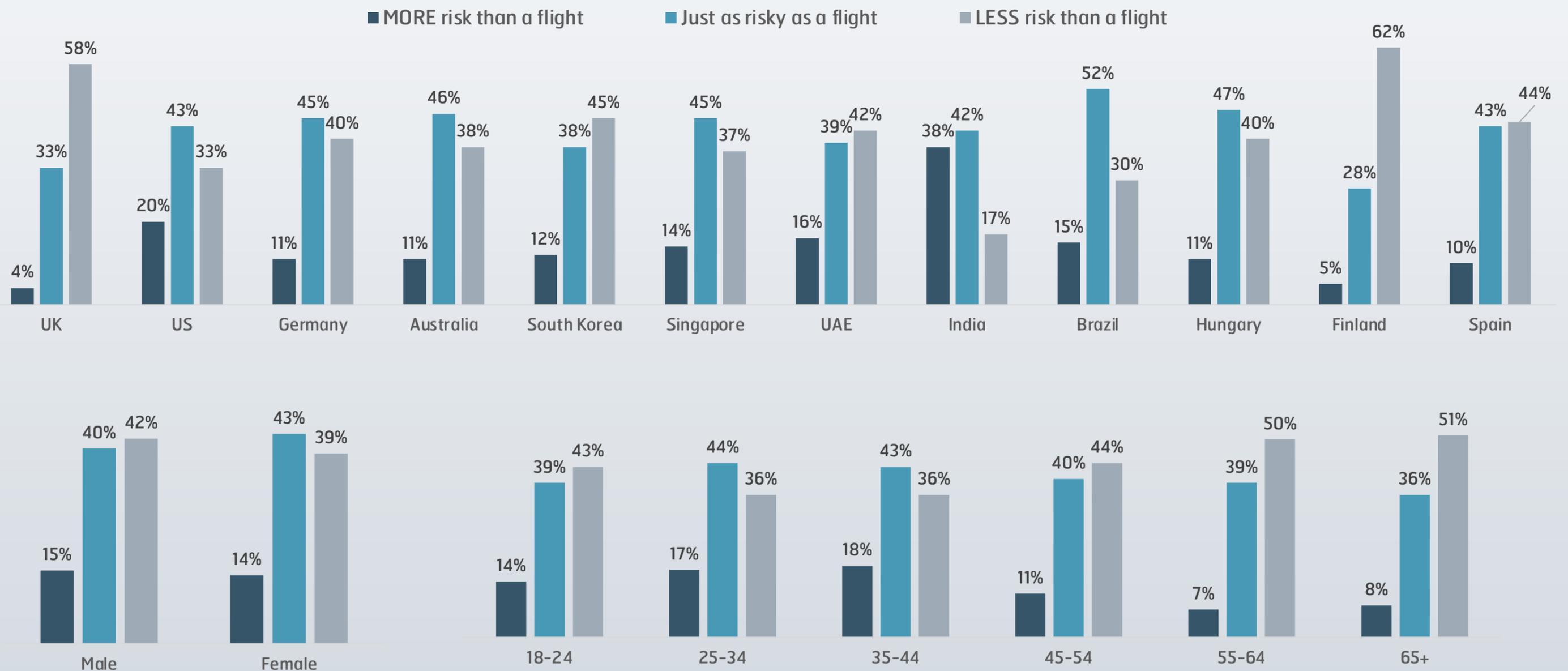
Gym/Leisure Centre



Around a quarter of people in the UK, Australia, Singapore and Finland believe that the gym is less risky than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

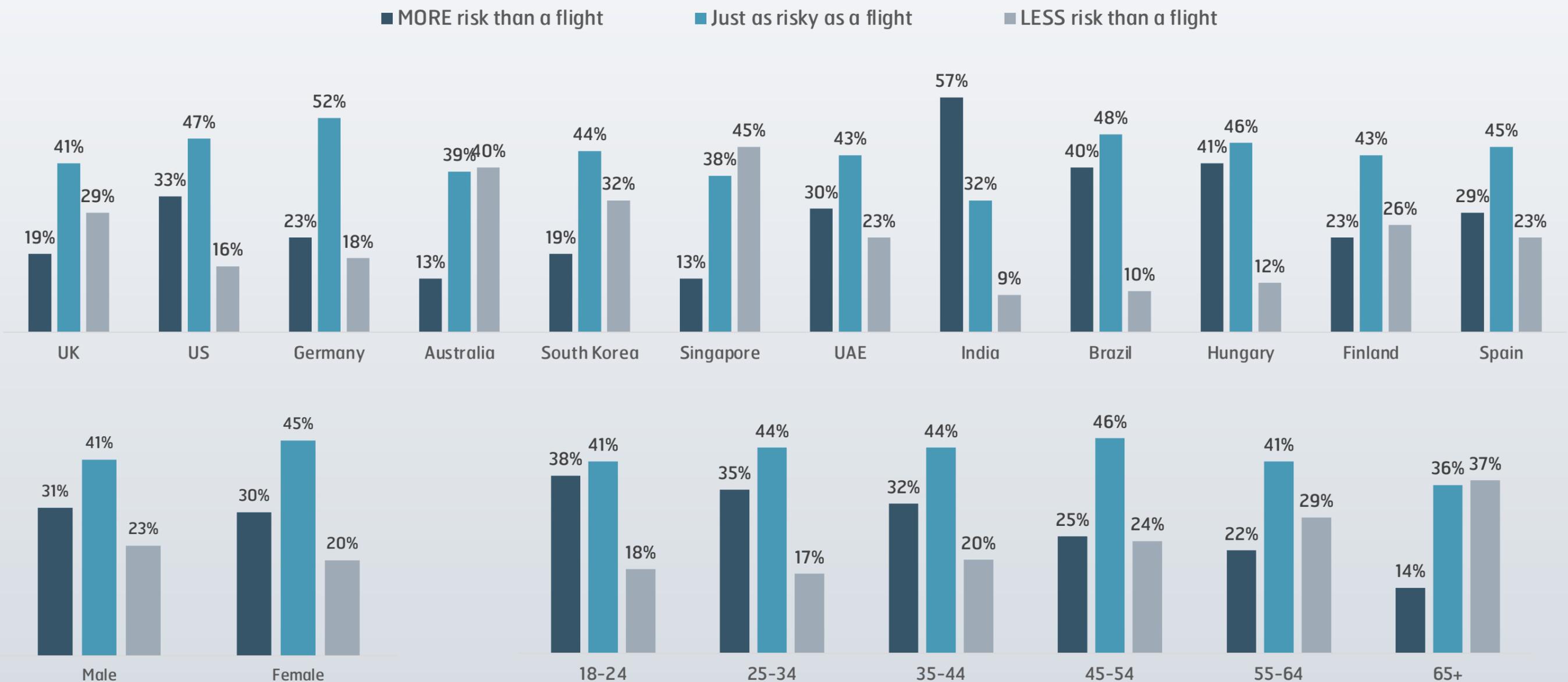
Hotel/Rental Accommodation



62% of those in Finland consider hotel and rental accommodation to be less risk than taking a flight.

Q7. In comparison to catching a flight, would you consider these places to be higher or lower risk?

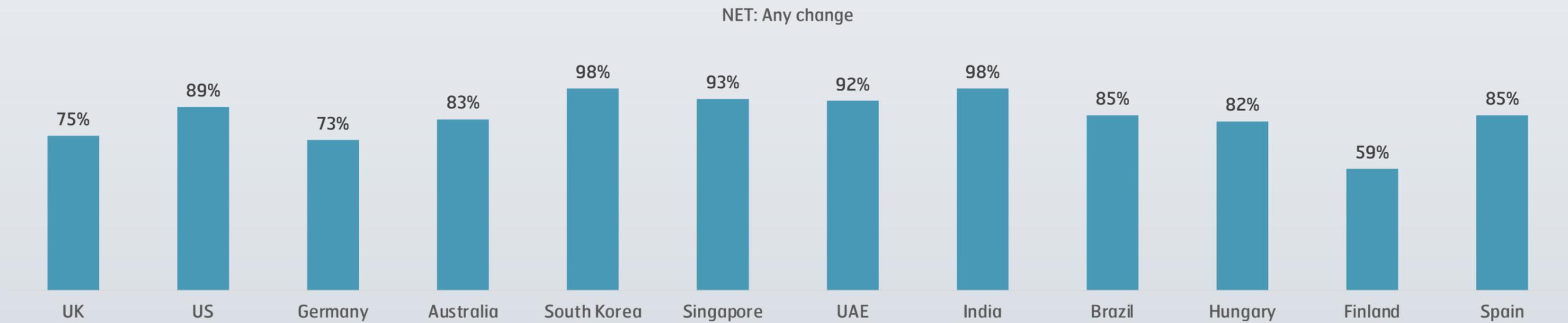
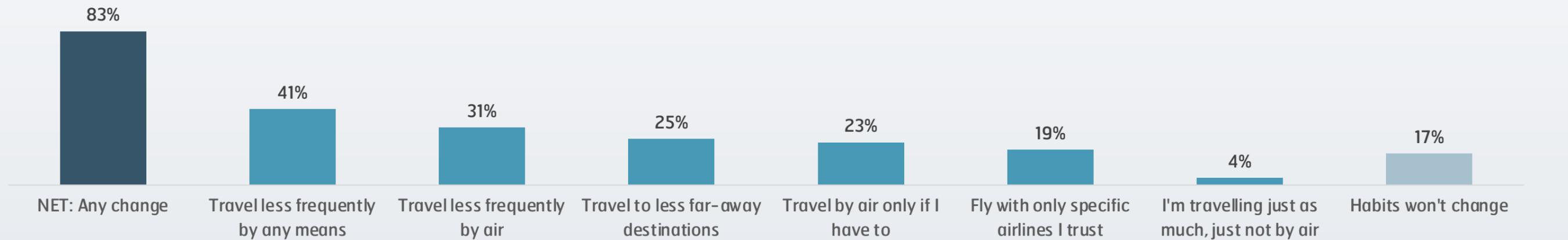
School



57% of those interviewed in India believe school to be more risk than taking a flight.

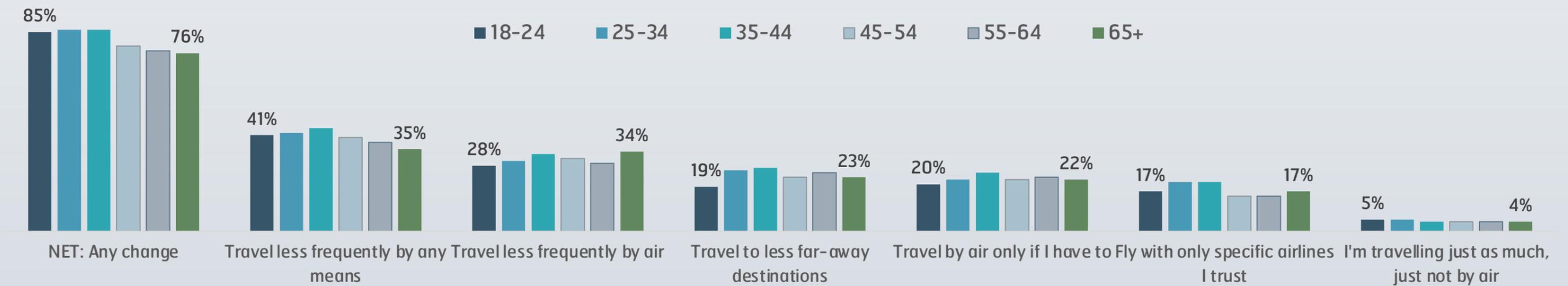
Q8. How are your travel habits likely to change post-COVID-19?

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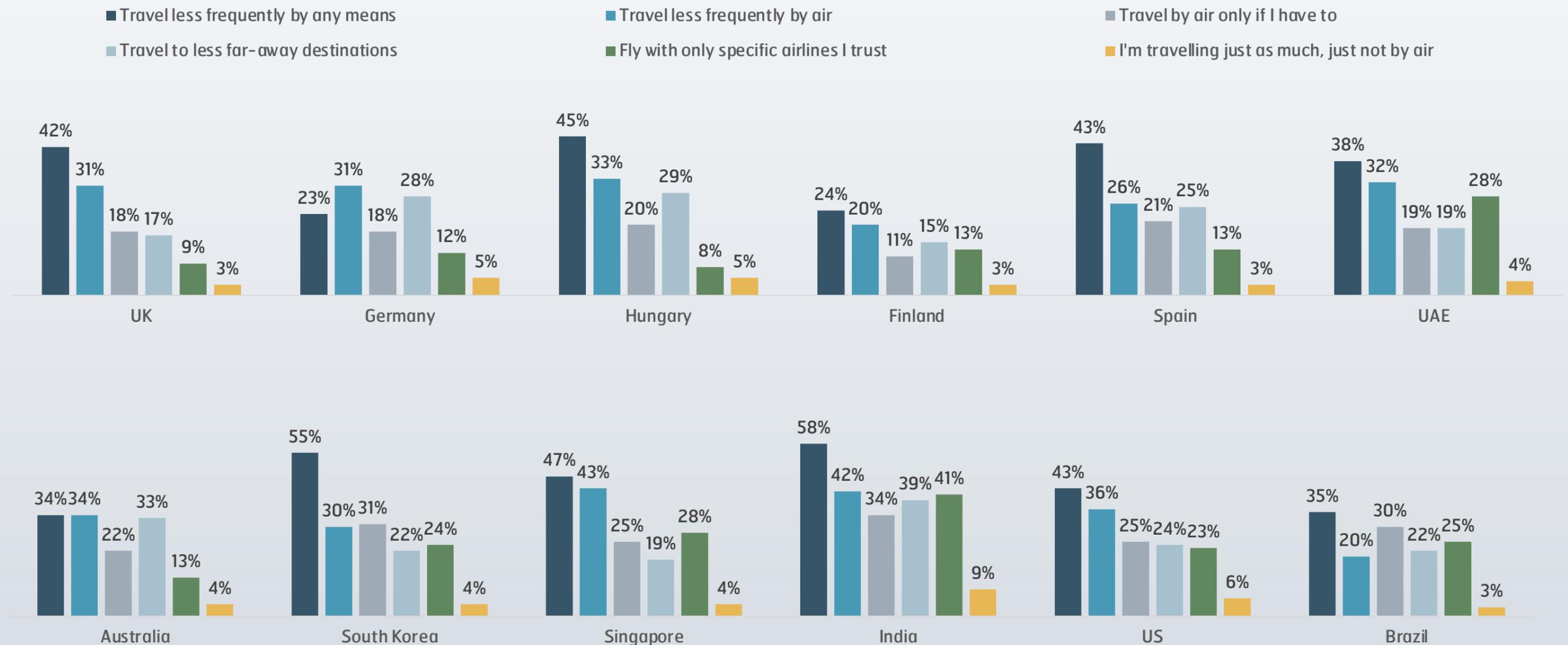
8/10 air passengers say their travel habits will change as a result of COVID-19.

Q8. How are your travel habits likely to change post-COVID-19?



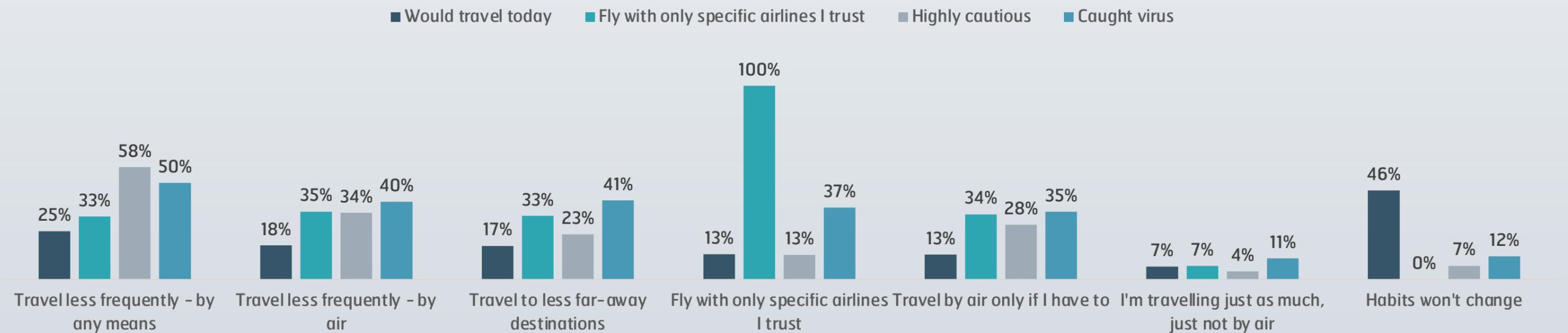
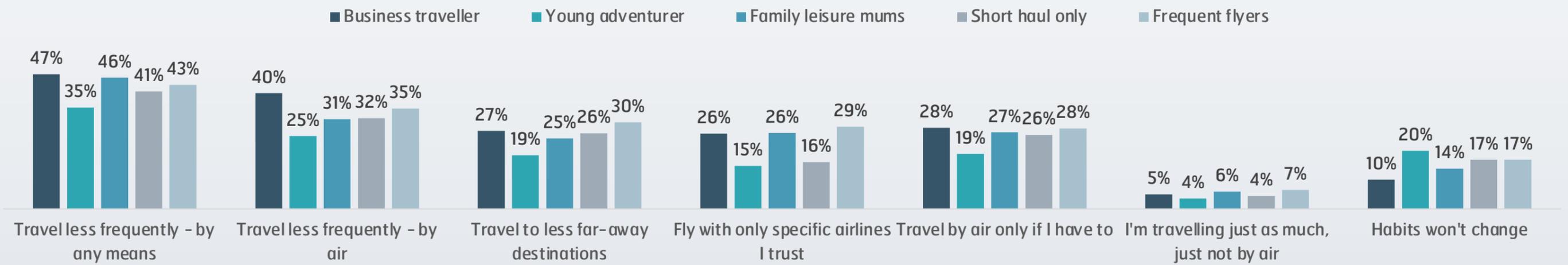
41% plan to travel less frequently by any means and a third (31%) plan to fly less

Q8. How are your travel habits likely to change post-COVID-19?



Travel anxiety is higher among Asian passengers, with 58% in India and 55% in South Korea planning to travel less in the future

Q8. How are your travel habits likely to change post-COVID-19?

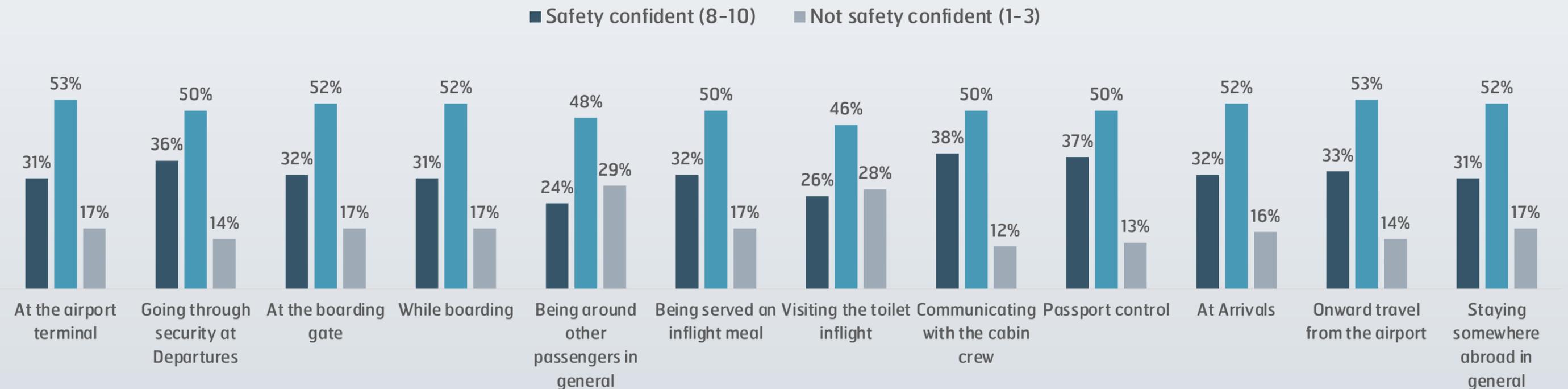


Business travellers are foreseeing the biggest change to their travel habits, with young adventurers least likely to change their plans.

Q9a. How confident would you feel with regards to SAFETY / HEALTH PRECAUTIONS at the following points in a journey?

Q9a. How confident would you feel with regards to SAFETY/ HEALTH PRECAUTIONS at the following points in a journey?

Score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

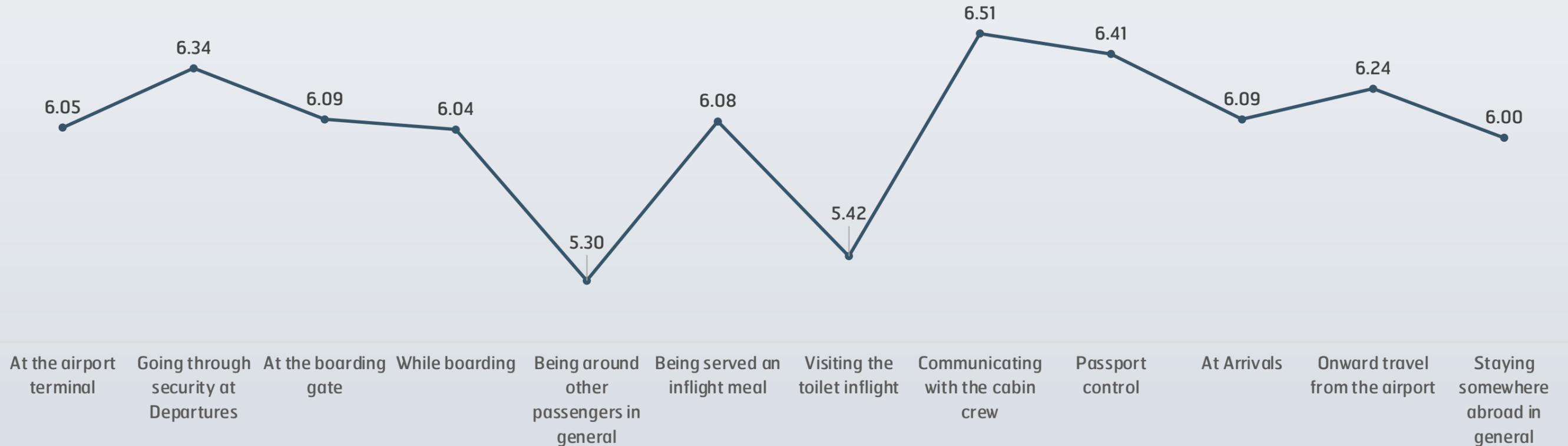


While passengers largely feel confident at passport control, security and communicating with cabin crew, they are less comfortable visiting the toilet inflight, and being in close proximity to others.

Q9a. How confident would you feel with regards to SAFETY/ HEALTH PRECAUTIONS at the following points in a journey?

Score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

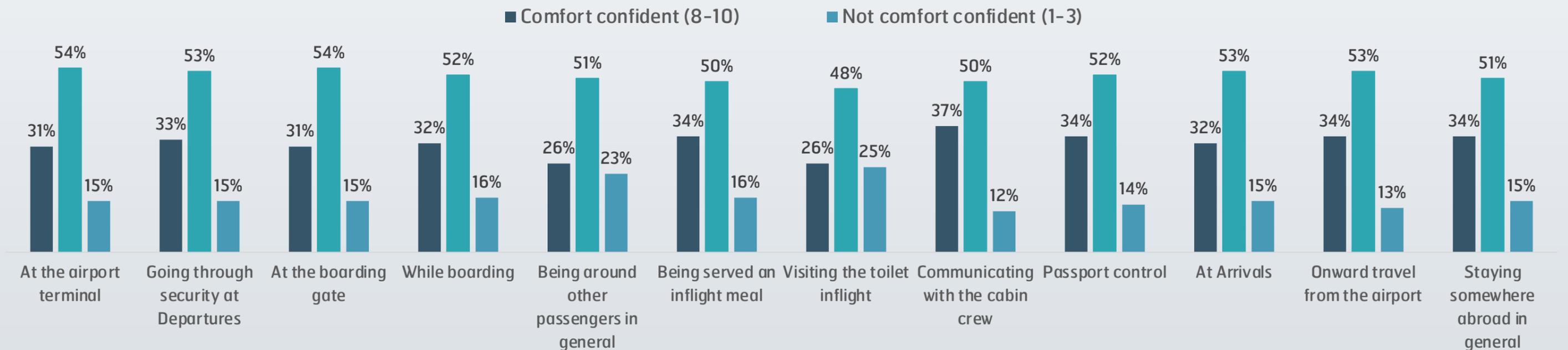
Mean safety confidence



Q9b. How confident would you feel with regards to COMFORT/ CONVENIENCE at the following points in a journey?

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Score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

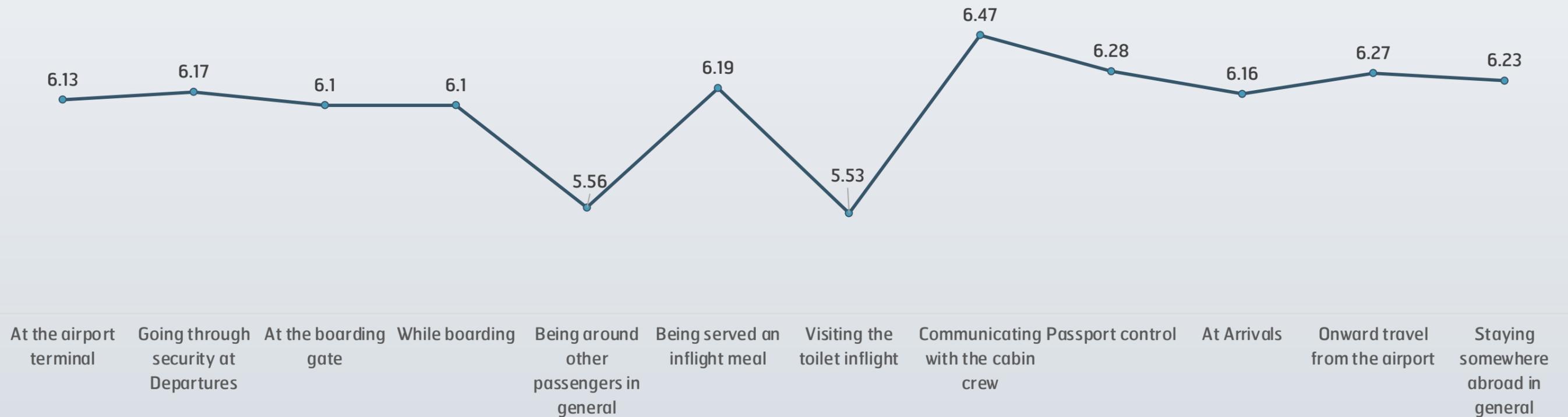


Being around other passengers is a concern, with 23% of those surveyed feeling uncomfortable.

Q9b. How confident would you feel with regards to COMFORT/ CONVENIENCE at the following points in a journey?

Score out of 10 at each point in the journey, where 10 = highly confident, and 1 = not at all confident

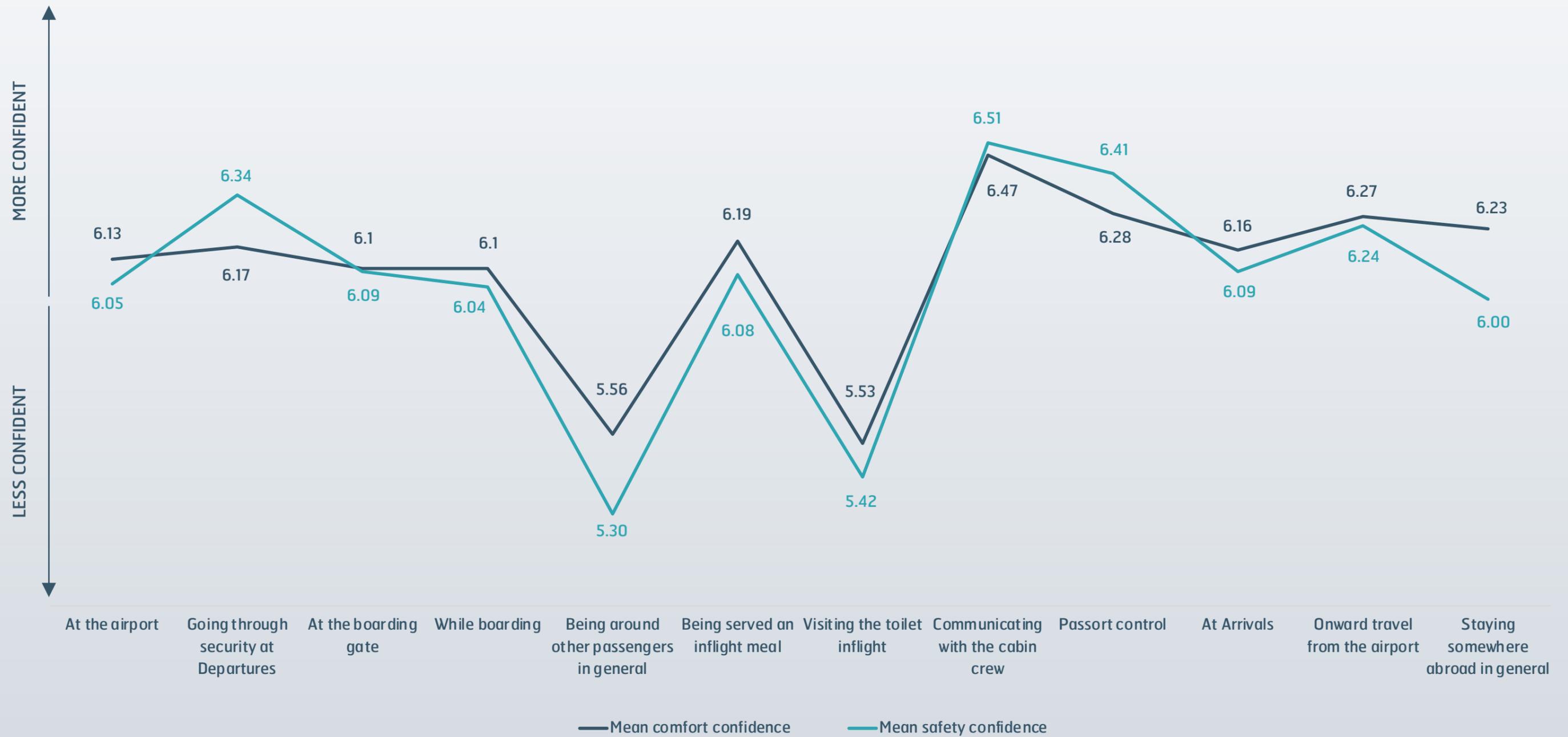
Mean comfort confidence



Passengers have more trust interacting with formal airport procedures and with airline staff – travellers' principal anxiety seems to be about *other passengers'* behaviour, not airline behaviour.

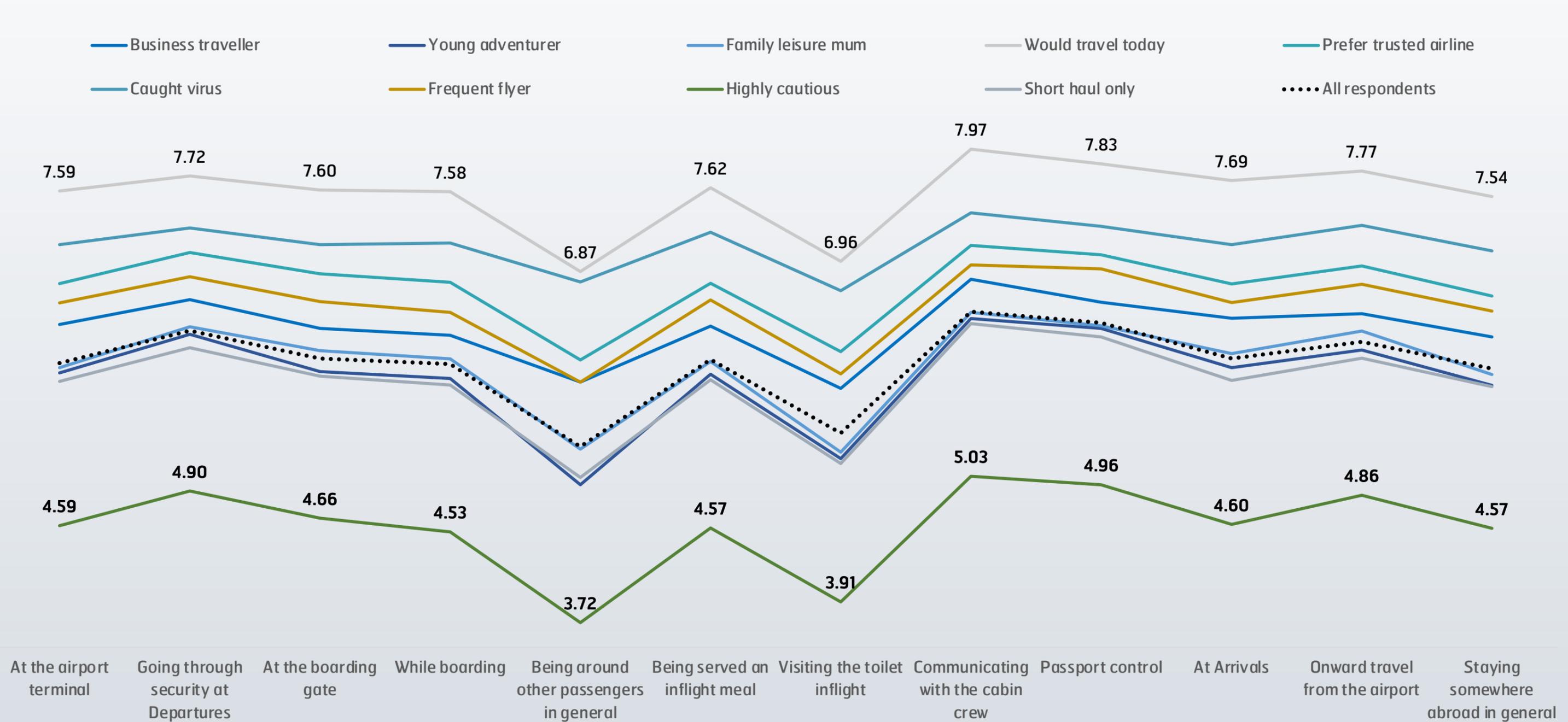
CONFIDENCE SCORING COMPARISONS

COMPARING CONFIDENCE IN HEALTH & SAFETY VS. IN COMFORT & CONVENIENCE



COMPARING SELECTED GROUPS' MEAN SAFETY CONFIDENCE SCORES THROUGHOUT THE JOURNEY

PASSENGER CONFIDENCE TRACKER



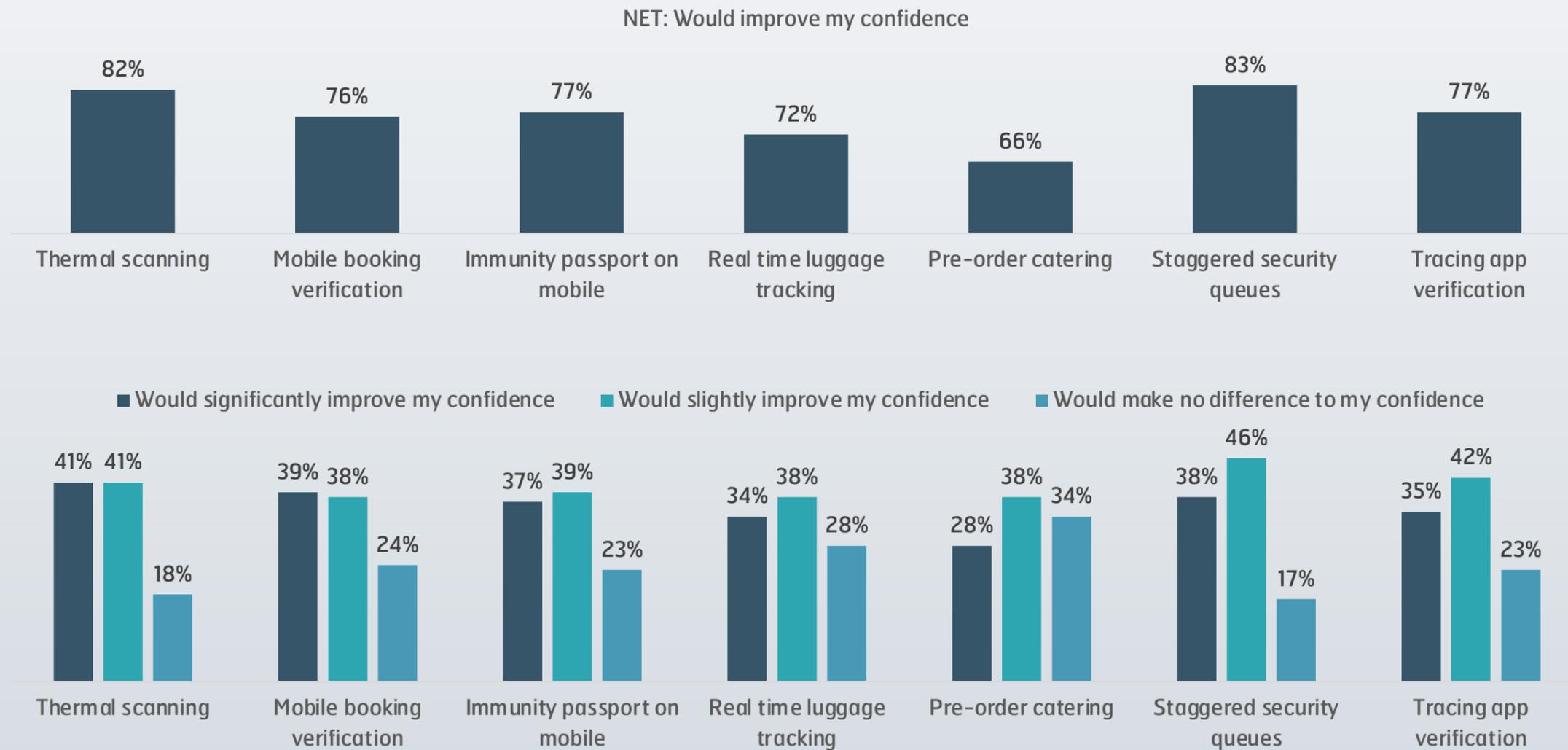
Those who travel regularly – like business travellers and frequent flyers – tend to be more confident at each stage of the journey than young adventurers and people who only took a short haul trip in 2019.

Q10. How much would the following new measures improve your confidence at different points in the journey?

At the airport terminal

Q10. How much would the following new measures improve your confidence at different points in the journey?

At the airport terminal



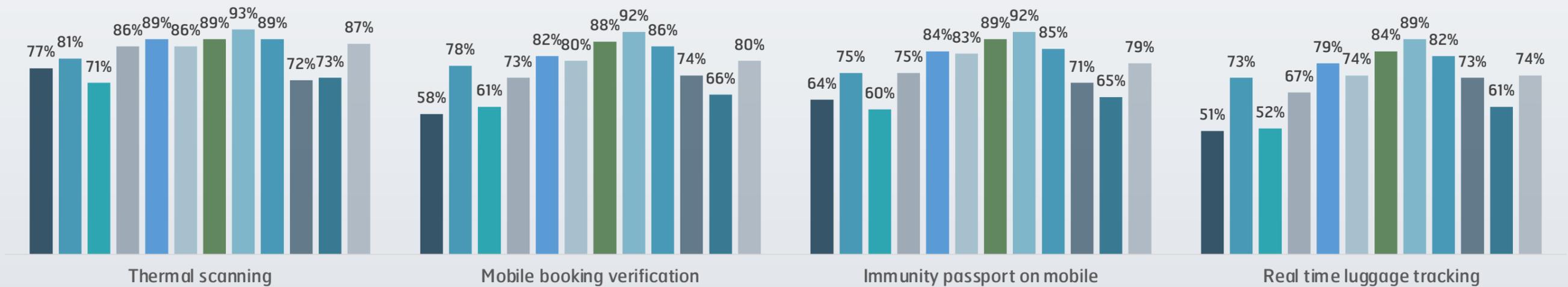
Staggered security queues and thermal scanning would improve passenger confidence the most.

Q10. How much would the following new measures improve your confidence at different points in the journey?

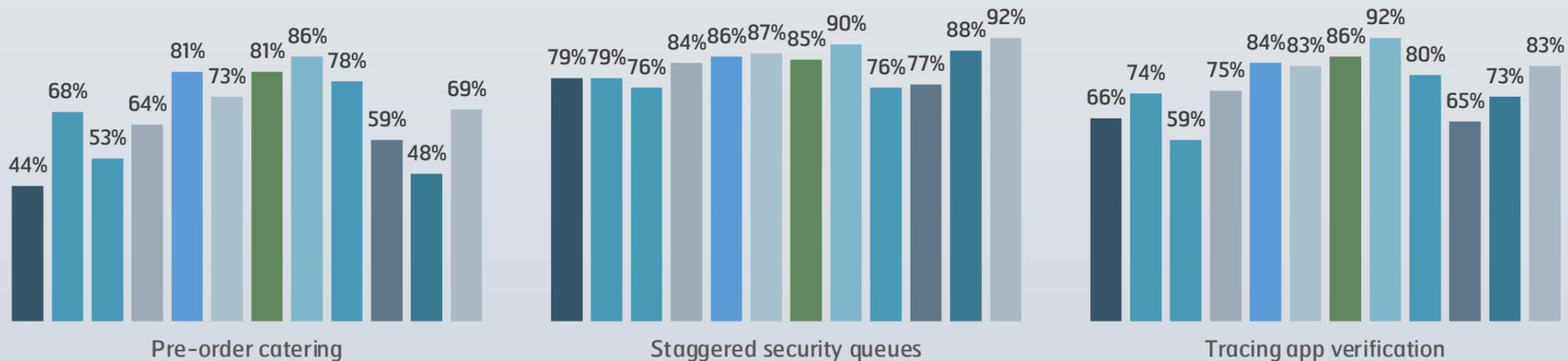
At the airport terminal

Net: 'would include my confidence'

■ UK ■ US ■ Germany ■ Australia ■ South Korea ■ Singapore ■ UAE ■ India ■ Brazil ■ Hungary ■ Finland ■ Spain



■ UK ■ US ■ Germany ■ Australia ■ South Korea ■ Singapore ■ UAE ■ India ■ Brazil ■ Hungary ■ Finland ■ Spain



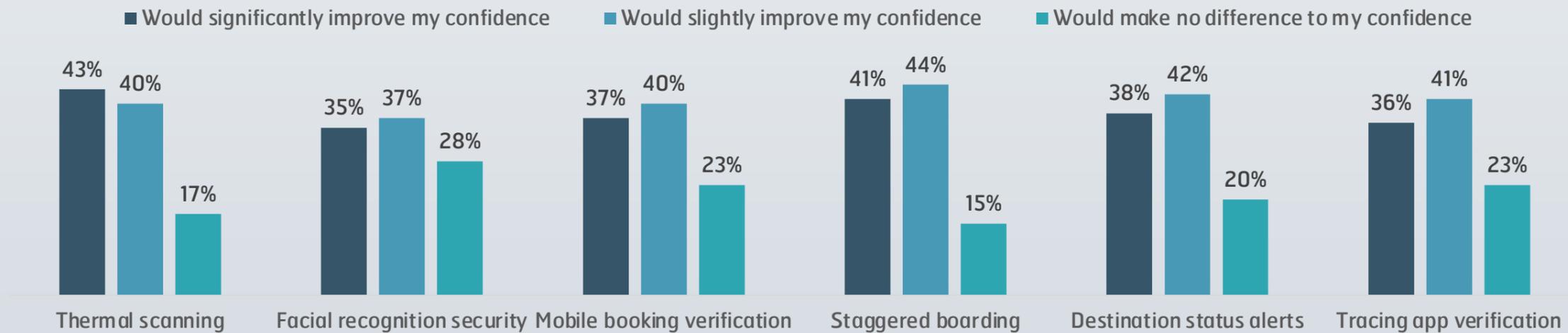
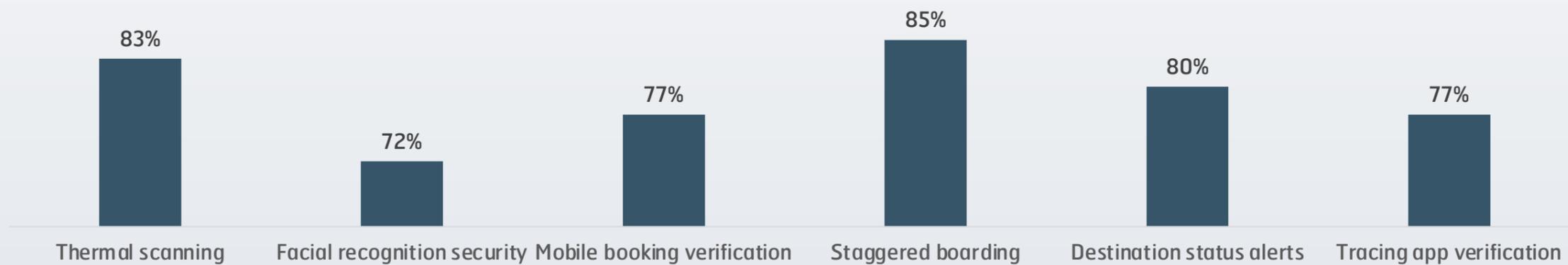
Q11. How much would the following new measures improve your confidence at different points in the journey?

At the boarding gate and while boarding

Q11. How much would the following new measures improve your confidence at different points in the journey?

At the boarding gate and while boarding

NET: Would improve my confidence

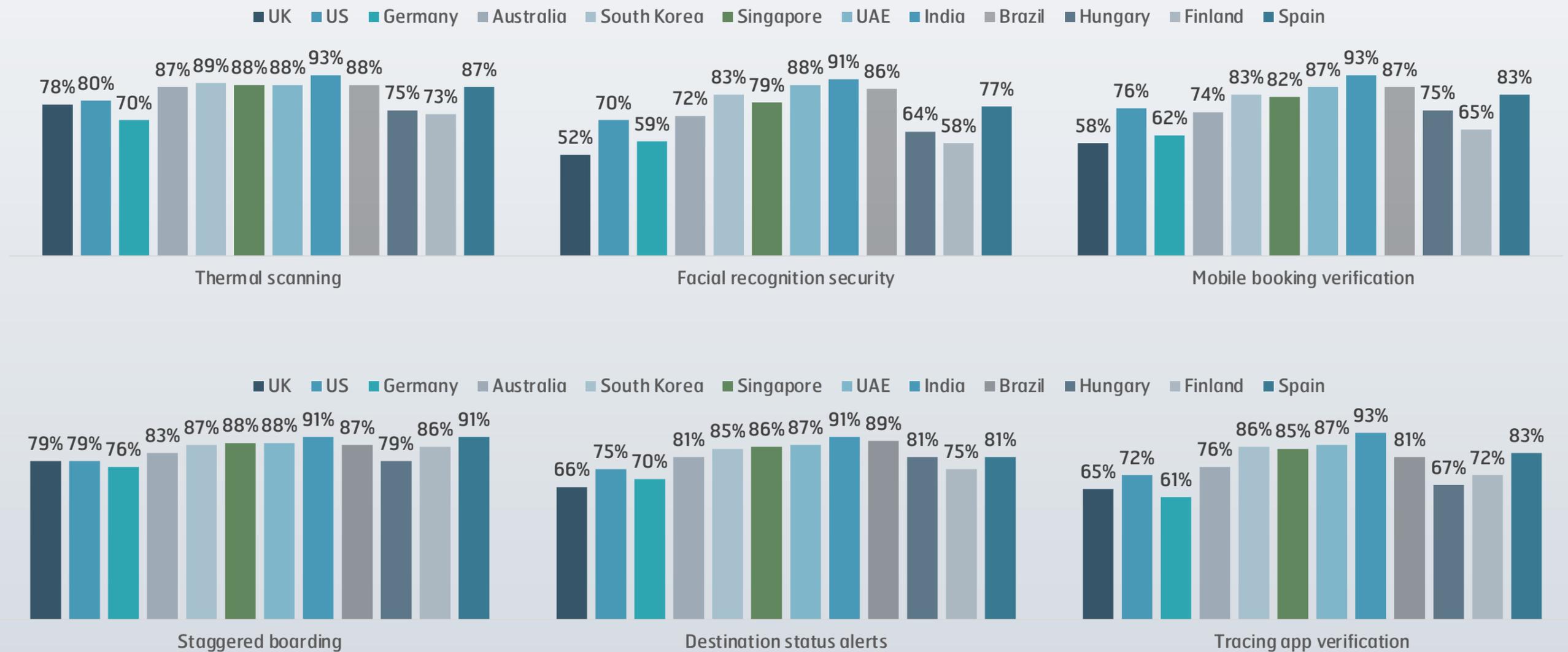


85% of passengers would feel more confident flying with staggered boarding.

Q11. How much would the following new measures improve your confidence at different points in the journey?

At the boarding gate and while boarding

Net: 'would include my confidence'



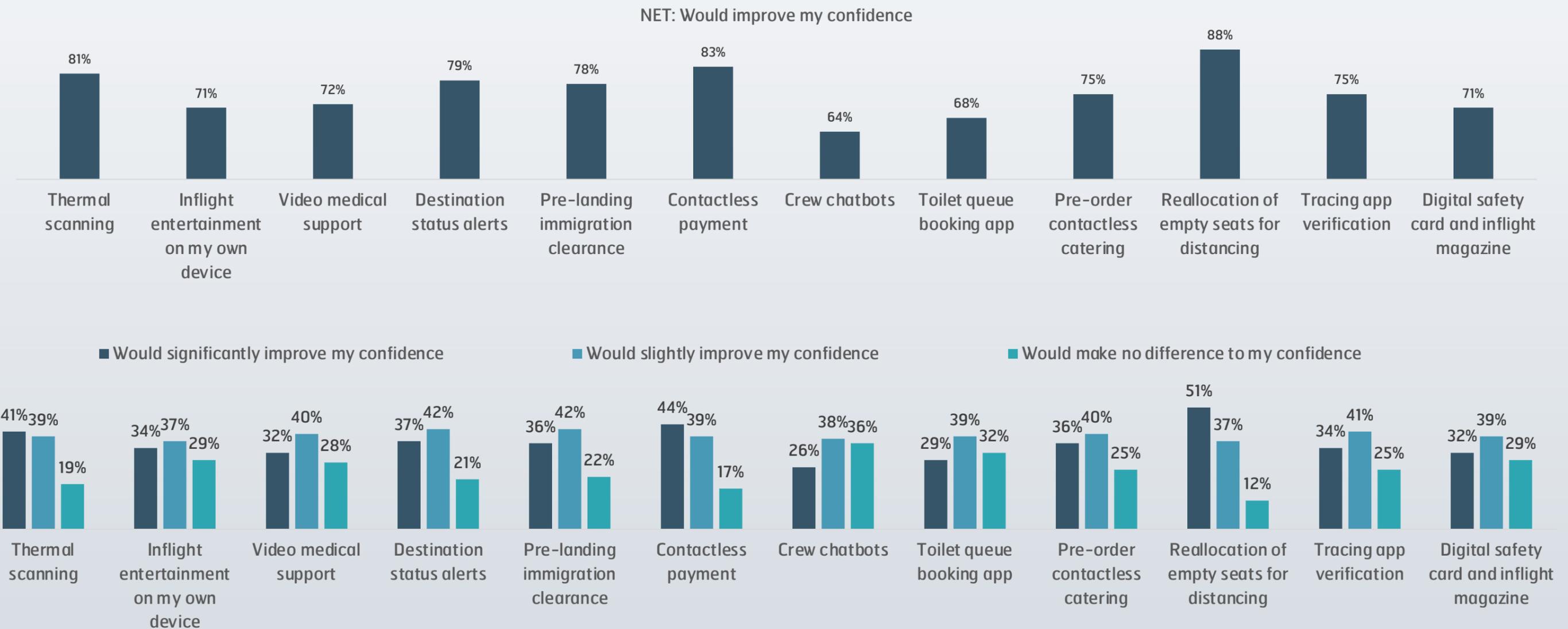
Thermal scanning, staggered boarding and destination status alerts had the most positive reaction in terms of confidence.

Q12. How much would the following new measures improve your confidence at different points in the journey?

During the flight

Q12. How much would the following new measures improve your confidence at different points in the journey?

During the flight



Solutions that minimise touchpoints and reduce interactions with others would go furthest in addressing today's passenger pain points - such as contactless payments inflight (83%) and staggered security queues (83%)

Q12. How much would the following new measures improve your confidence at different points in the journey?

During the flight

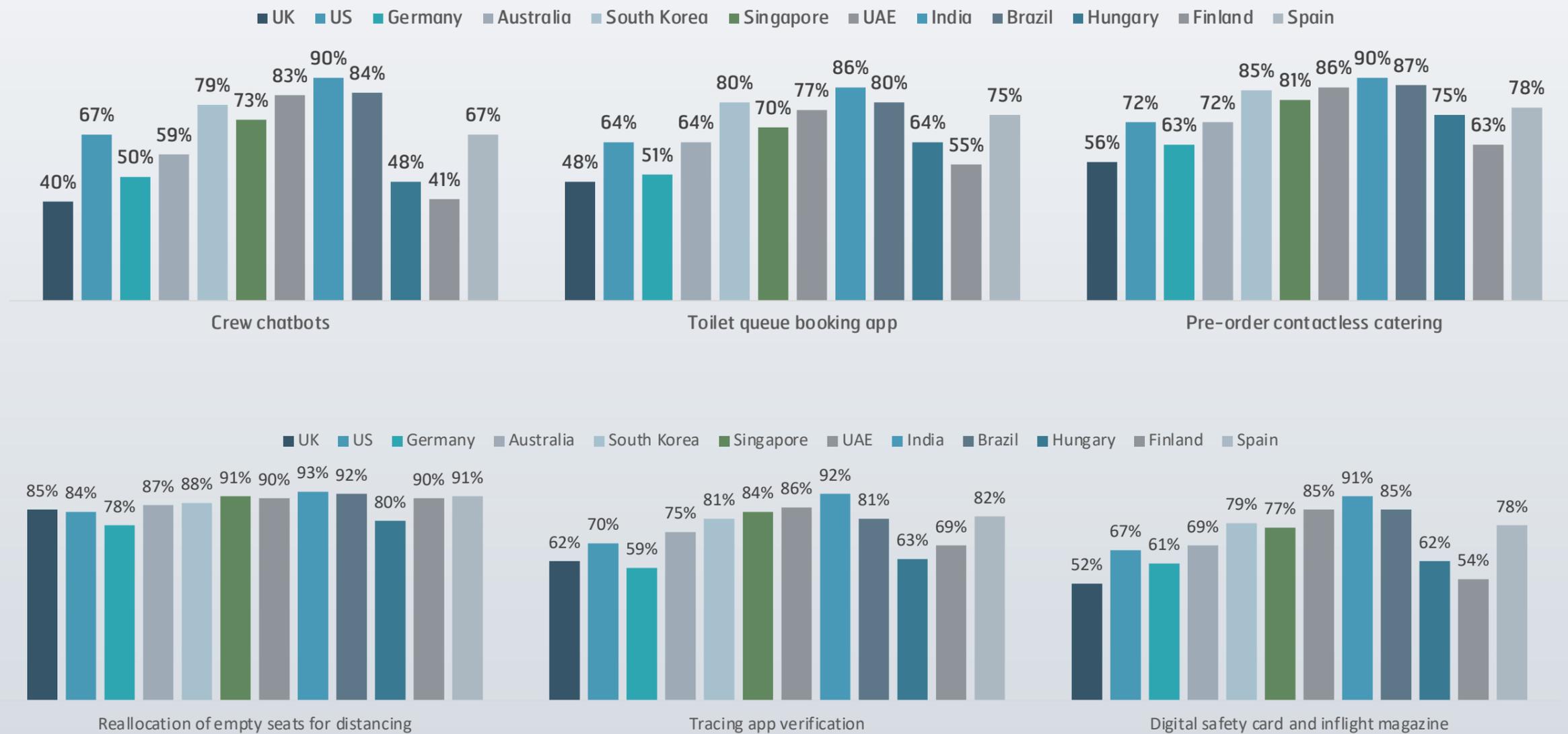


79% of all passengers said that their confidence would be increased inflight with destination status alerts; real time information and news about the place they were going to visit, while they were en-route.

Q12. How much would the following new measures improve your confidence at different points in the journey?

During the flight

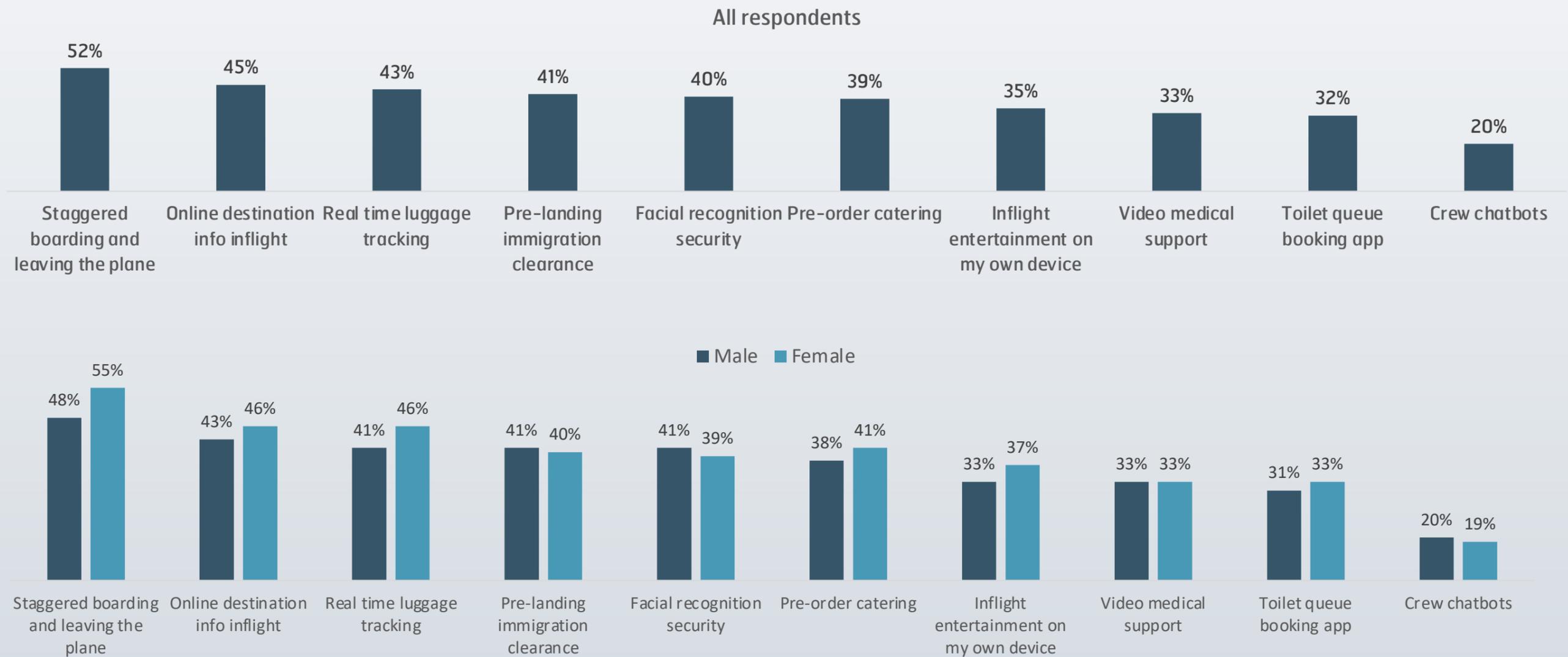
Net: 'would include my confidence'



Reallocation of empty seats for distancing would greatly improve passenger confidence during the flight.

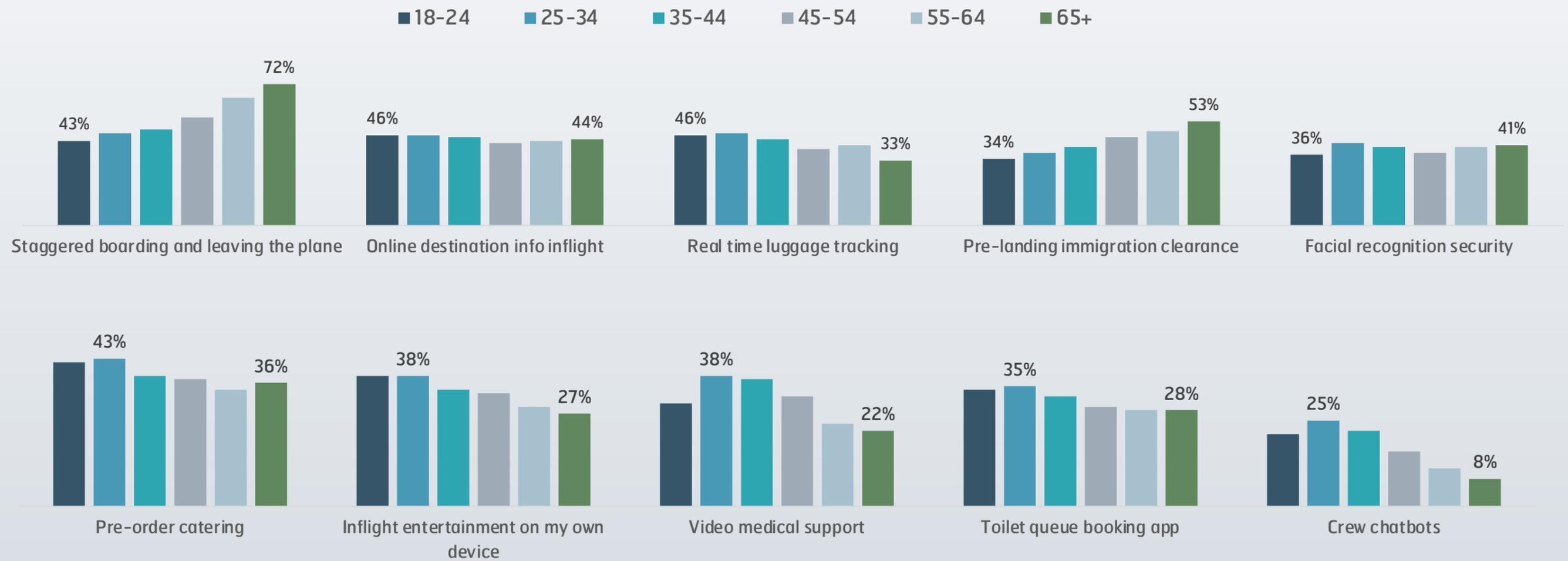
Q13. What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?

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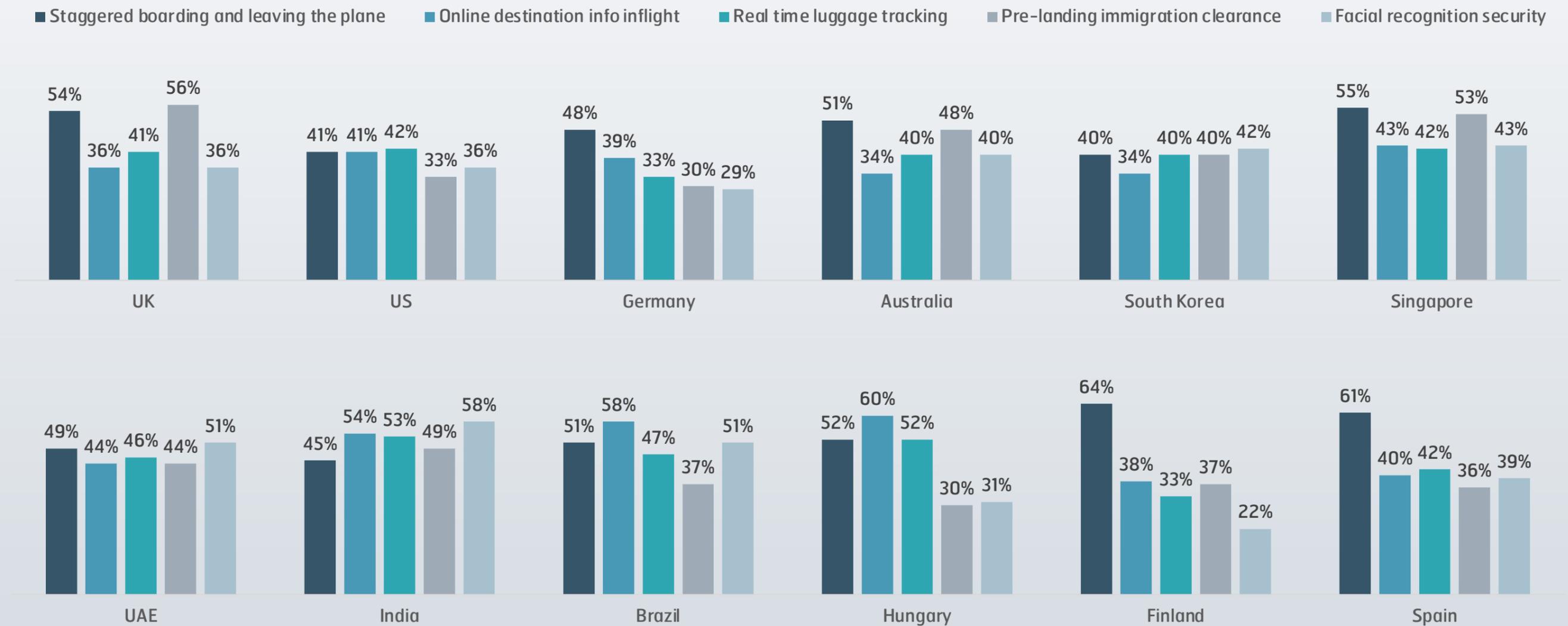


Staggered boarding is the most popular aspect that travelers want to remain (52%).

Q13. What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?

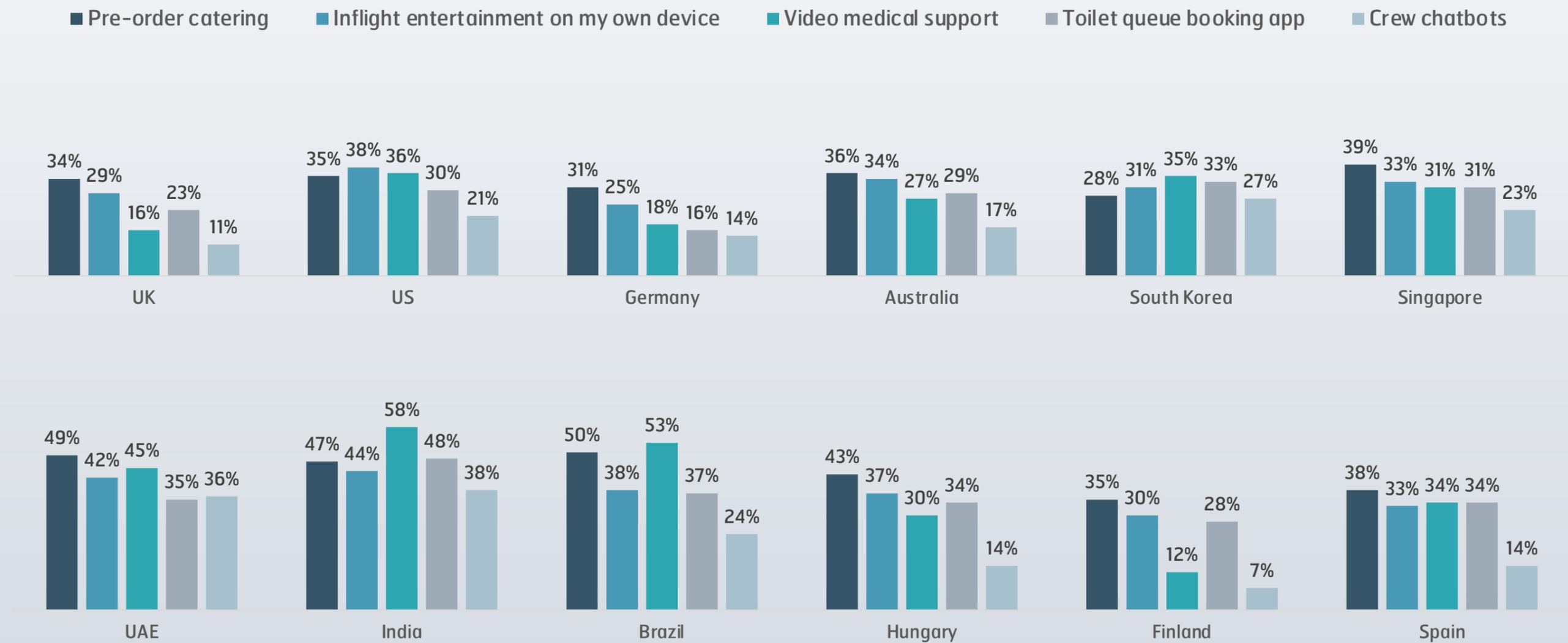


Q13. What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?

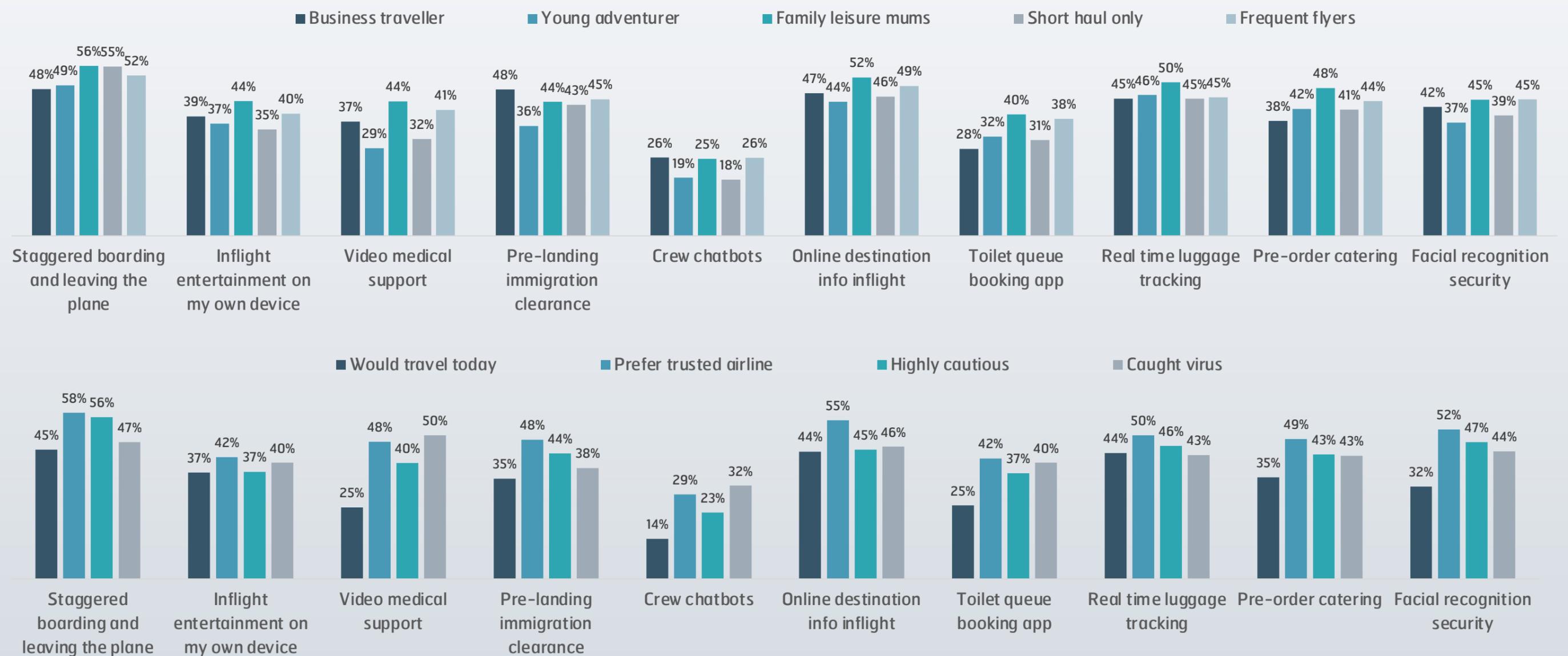


Facial recognition security was the number one improvement for passengers in India, South Korea and UAE and would like to see it kept even after the pandemic

Q13. What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic is over?



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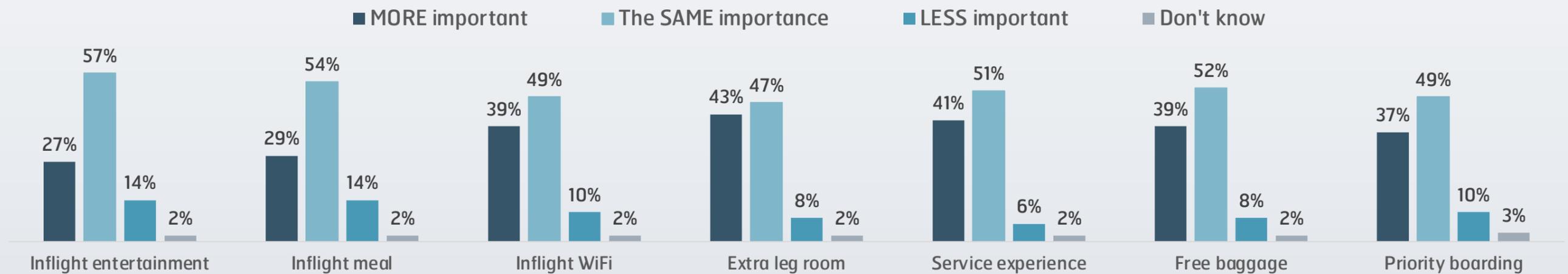


Those who say they intend to only travel with specific trusted airlines in the future are more likely to respond positively to updates to the current travel experience

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

All respondents



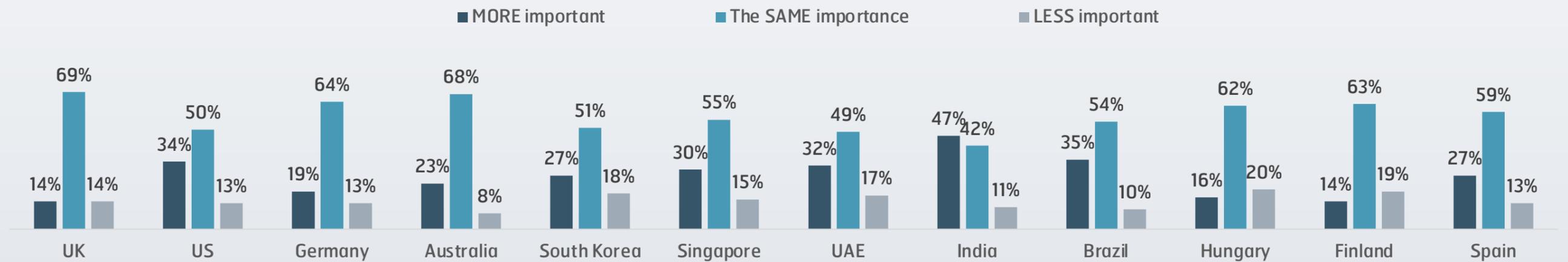
+/- Net change in importance



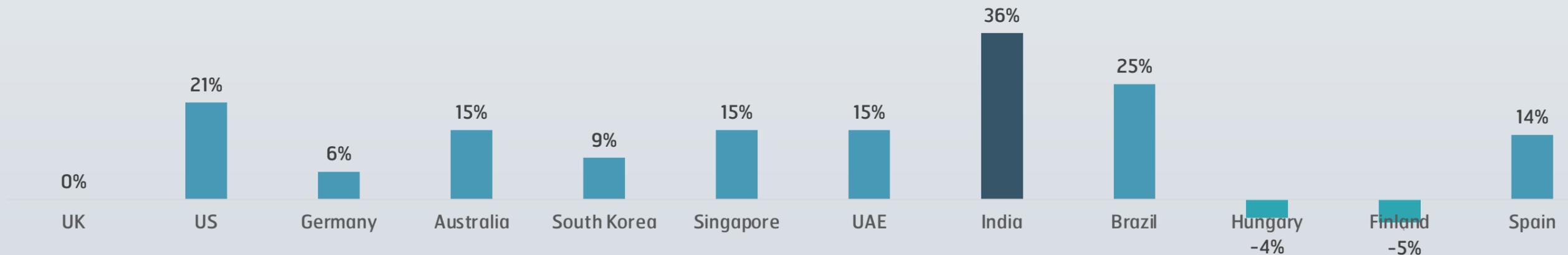
Value added services are becoming increasingly important, from extra legroom (43%) to free baggage (31%).

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Inflight entertainment



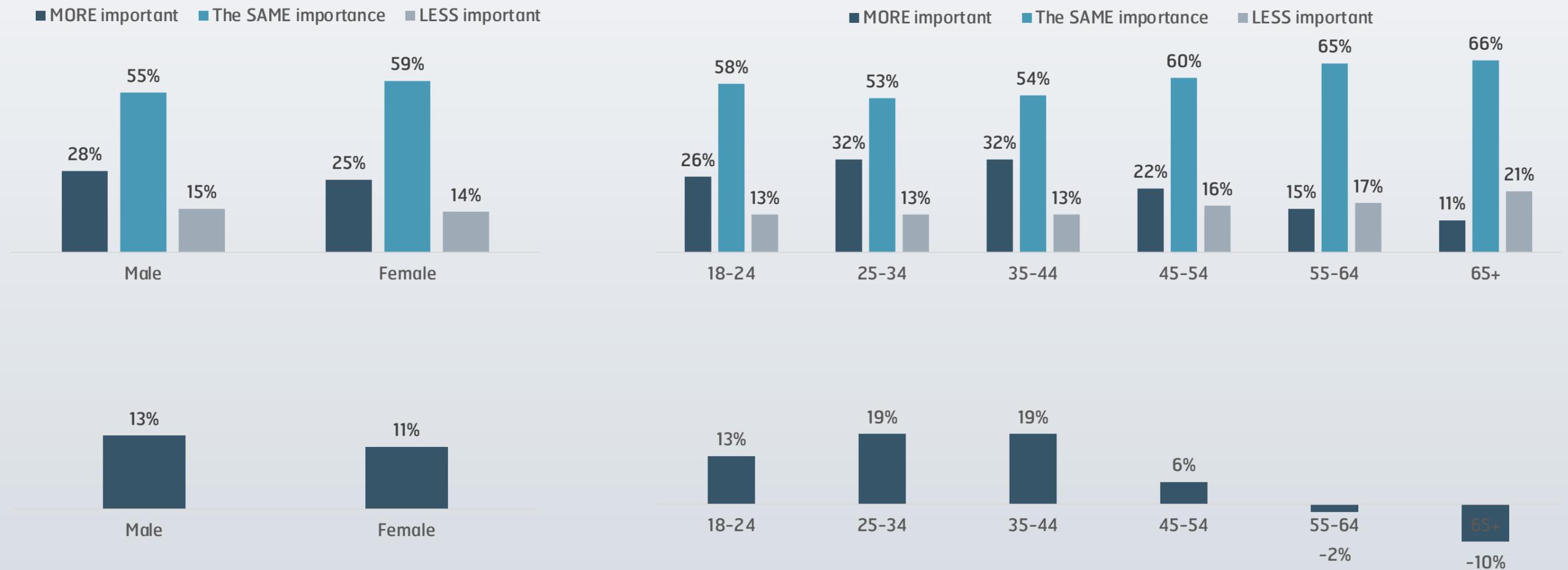
Net change in importance



Almost half of those surveyed in India believe inflight entertainment would enhance their overall flying experience

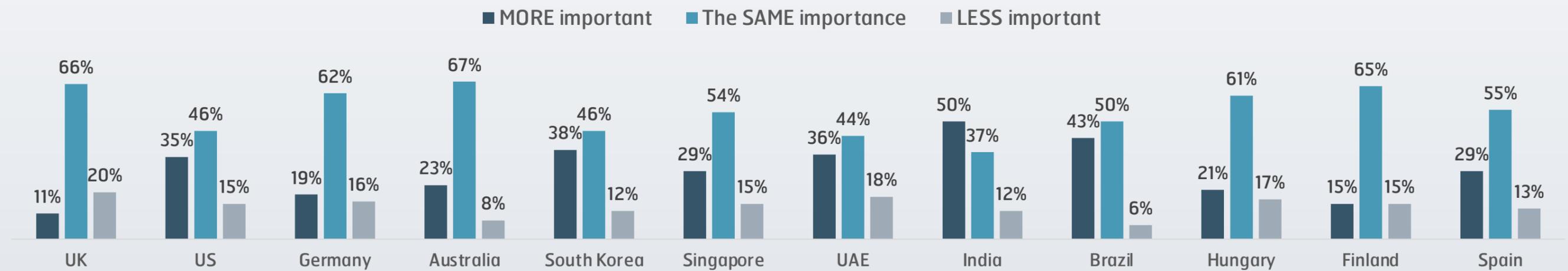
Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Inflight entertainment

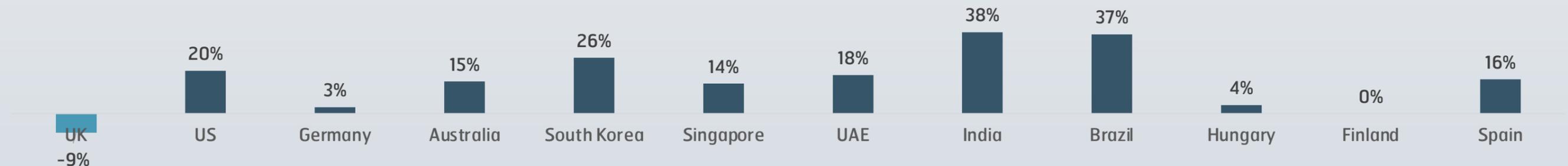


Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Inflight meal



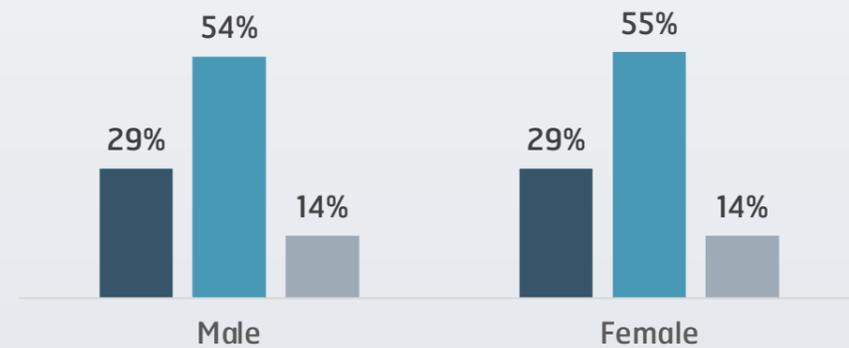
Net change in importance



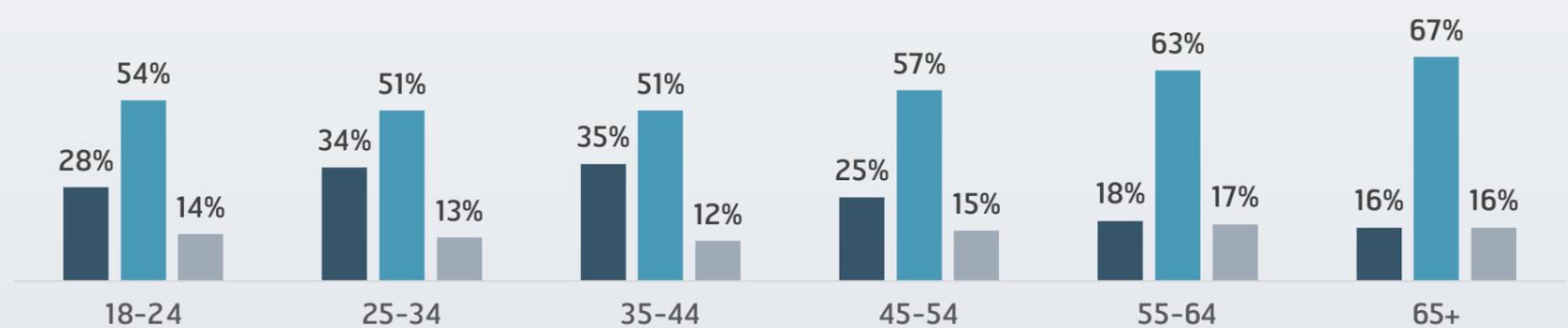
Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Inflight meal

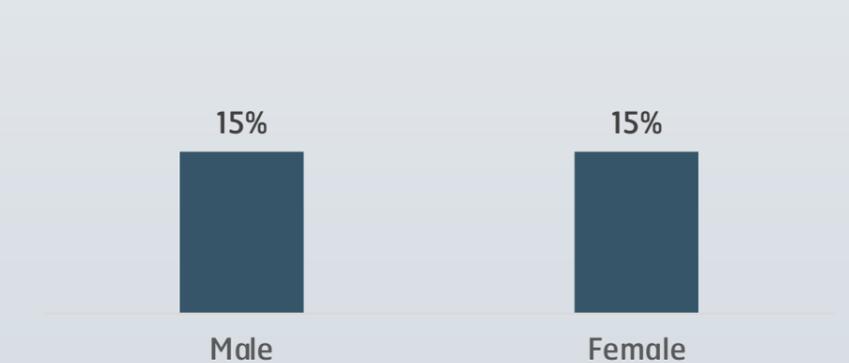
■ MORE important ■ The SAME importance ■ LESS important



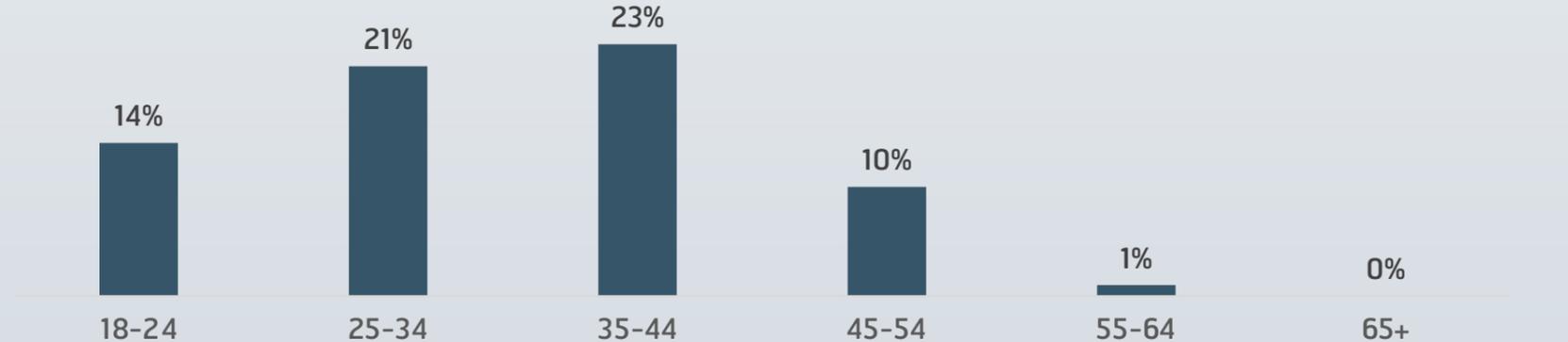
■ MORE important ■ The SAME importance ■ LESS important



Net change in importance

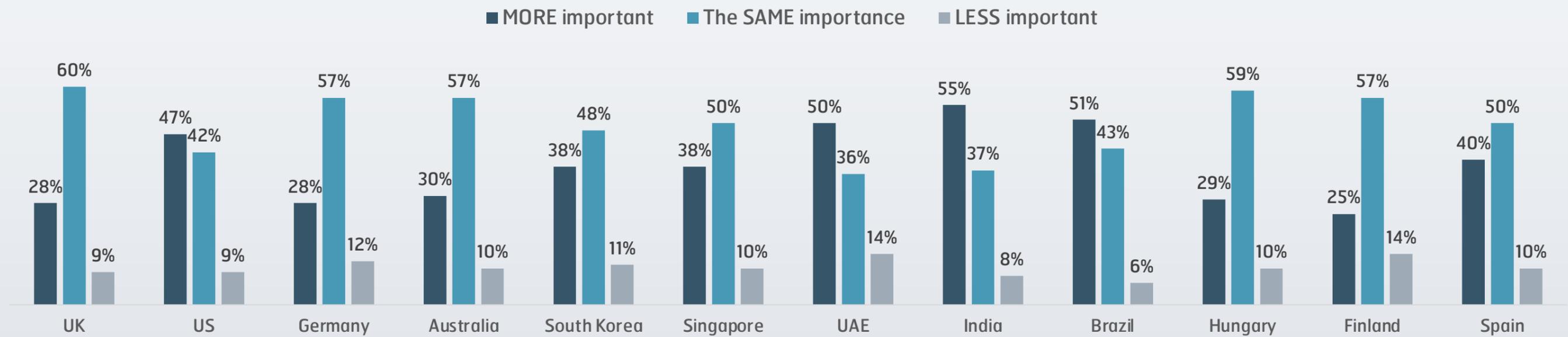


Net change in importance

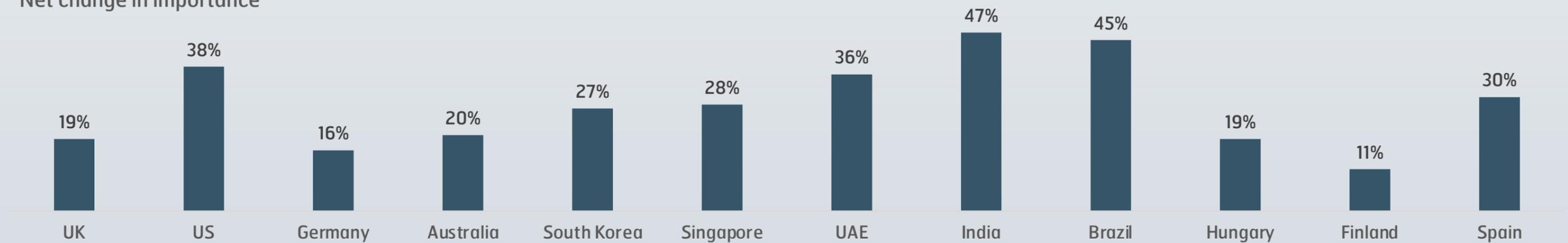


Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Inflight Wi-Fi



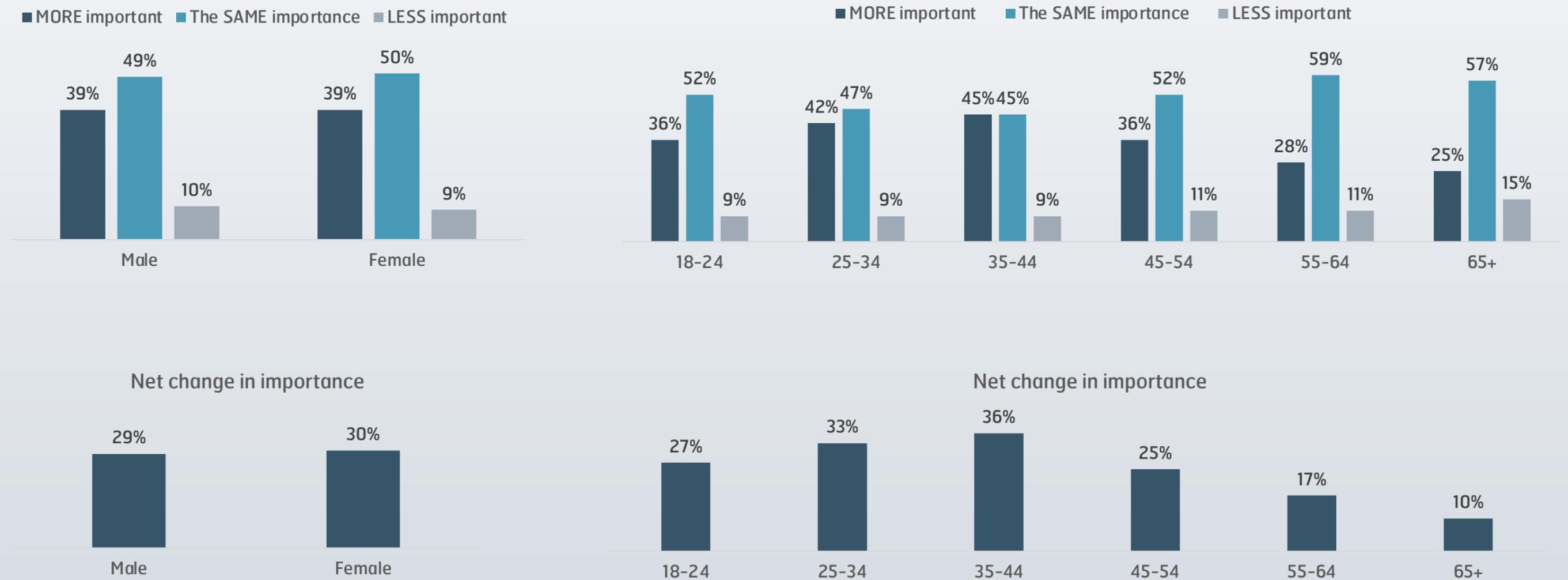
Net change in importance



Almost a third (29%) agree that onboard Wi-Fi matters more today than ever before.

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

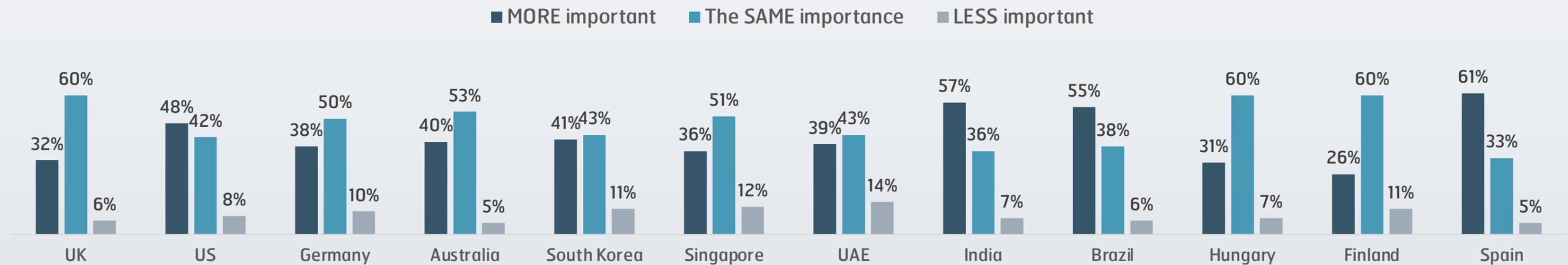
Inflight Wi-Fi



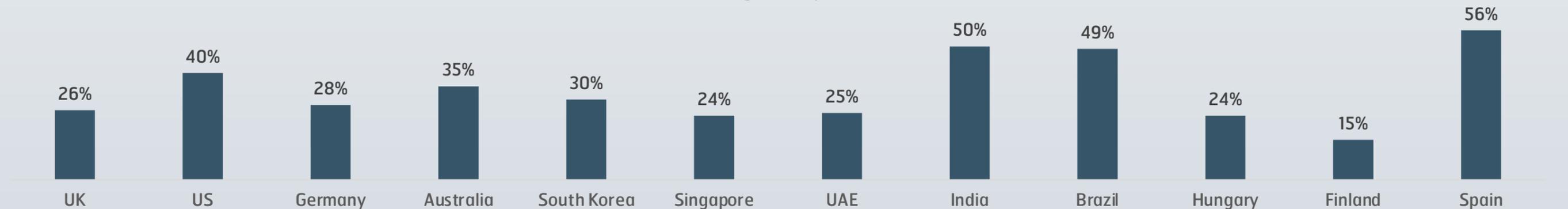
Over a quarter of 18-44 year-olds believe inflight Wi-Fi is more important now for the enjoyment of their flying experience.

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Extra leg room



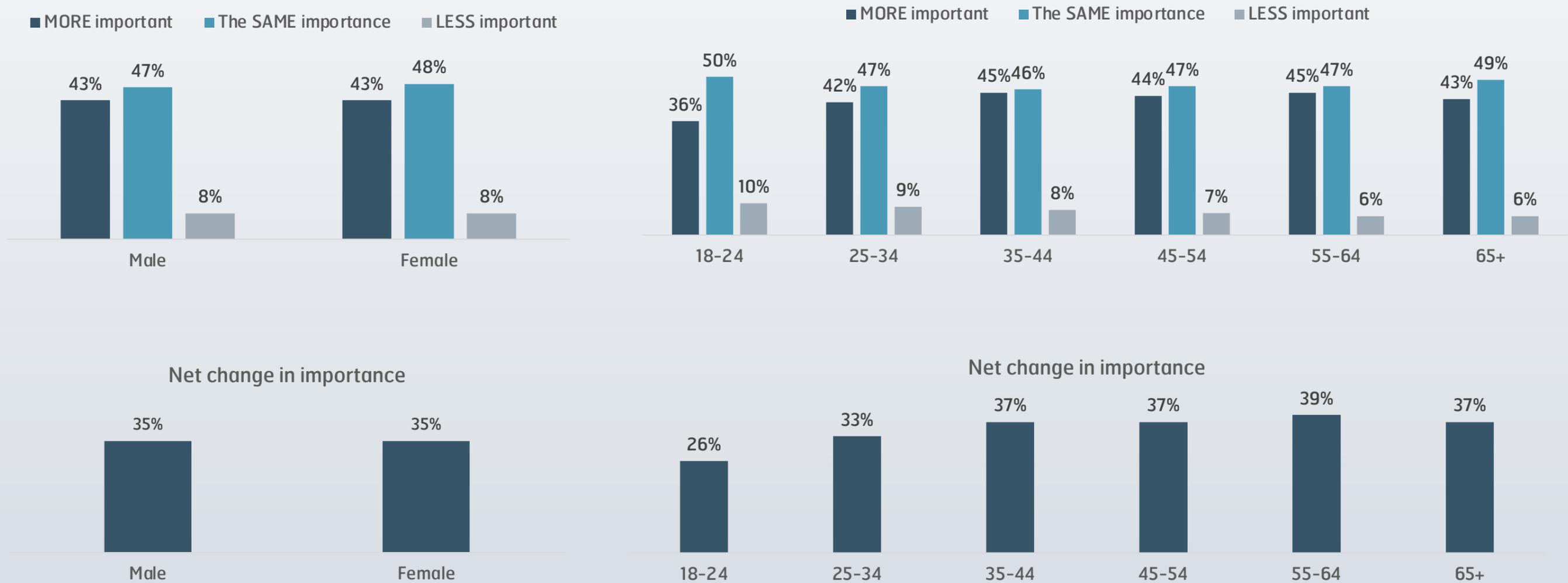
Net change in importance



Across every region, extra leg room would enhance the flying experience.

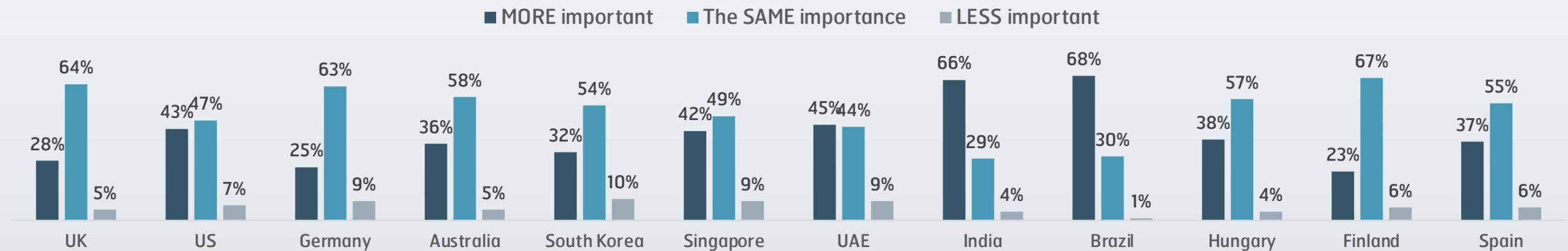
Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Extra leg room

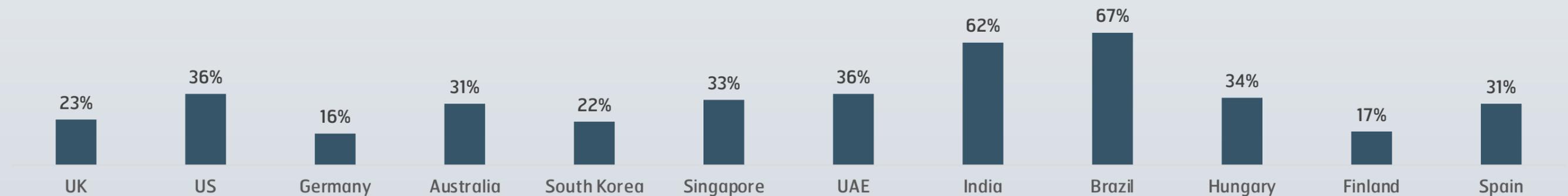


Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Service Experience



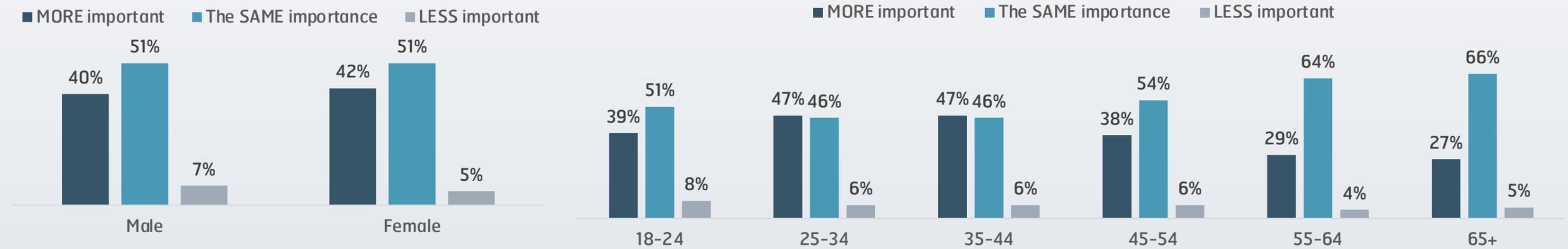
Net change in importance



Service experience is important for passengers in Brazil and India

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

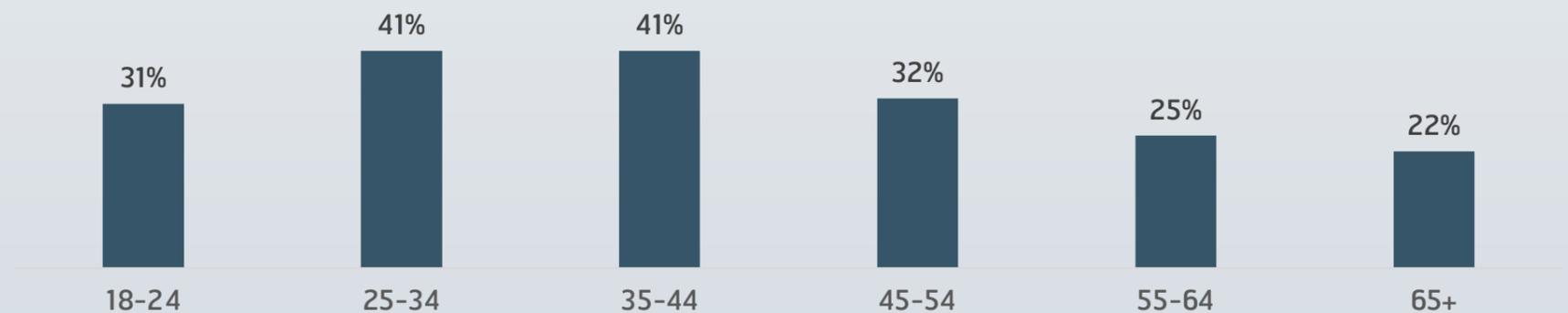
Service Experience



Net change in importance

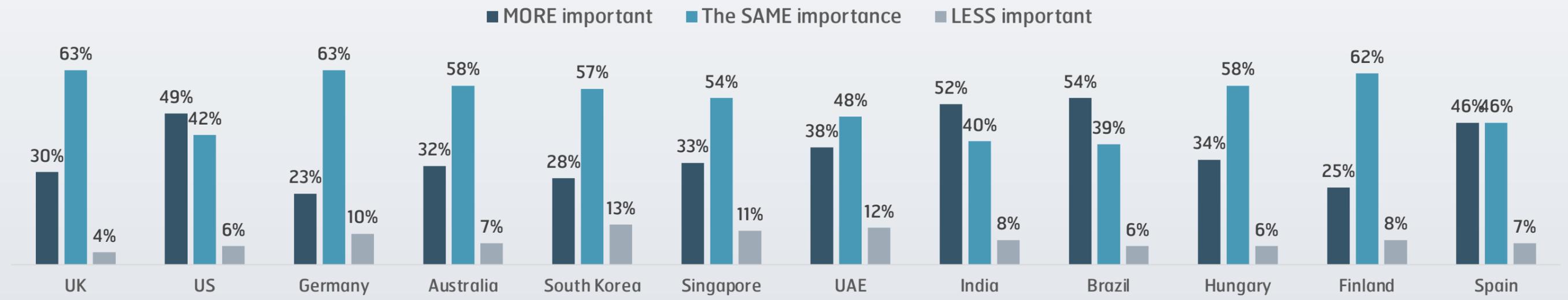


Net change in importance

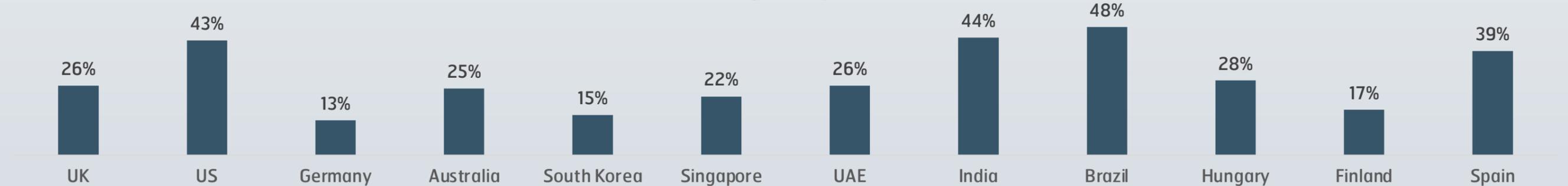


Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Free Baggage



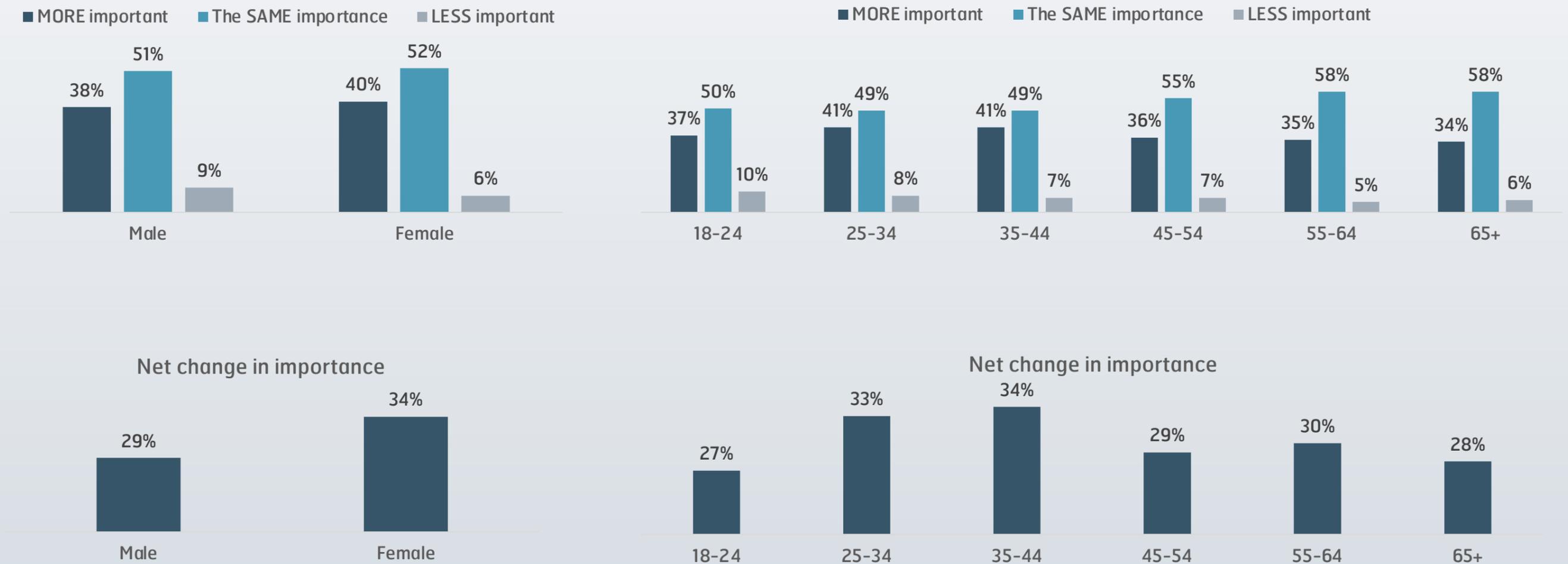
Net change in importance



Free baggage would be the most valued in India, Brazil and the United States.

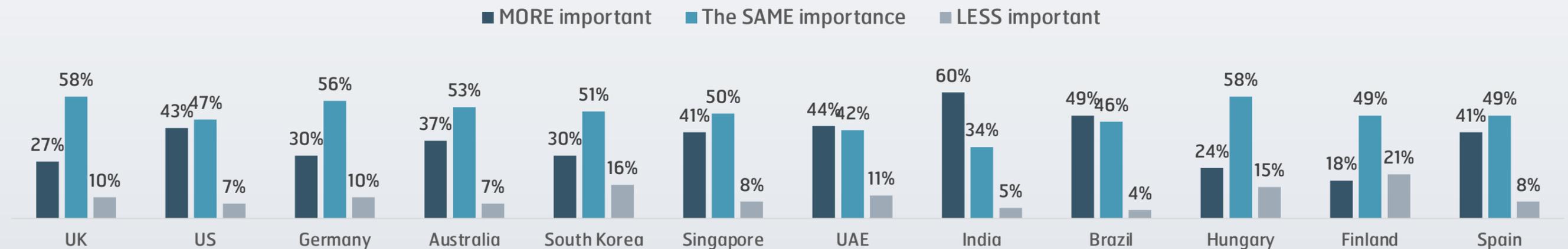
Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Free Baggage

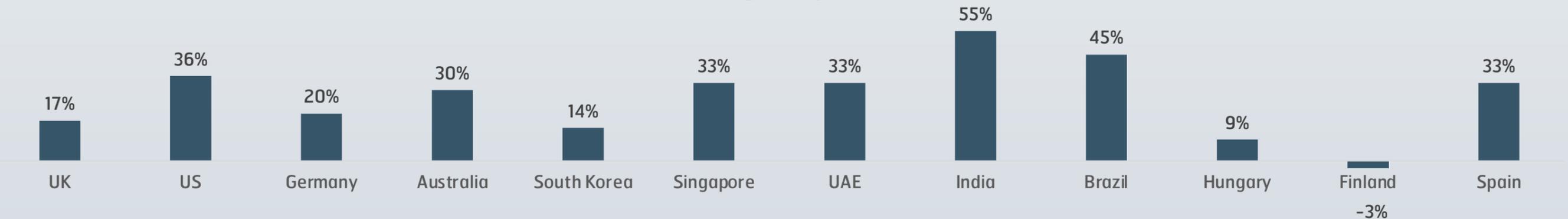


Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

Priority Boarding



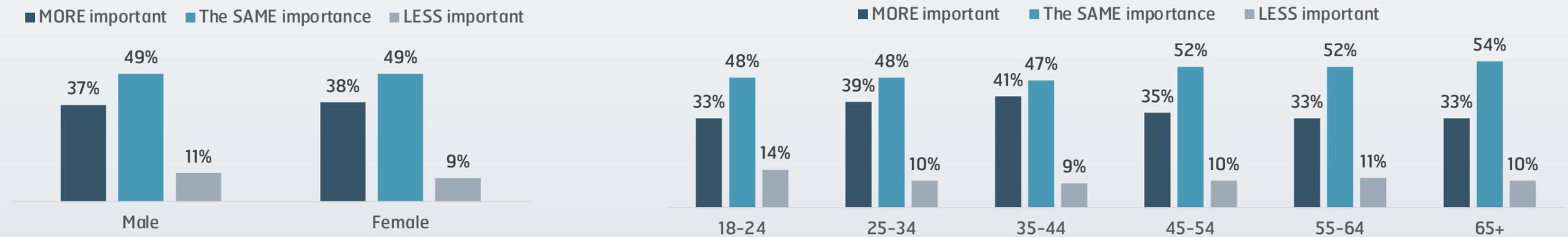
Net change in importance



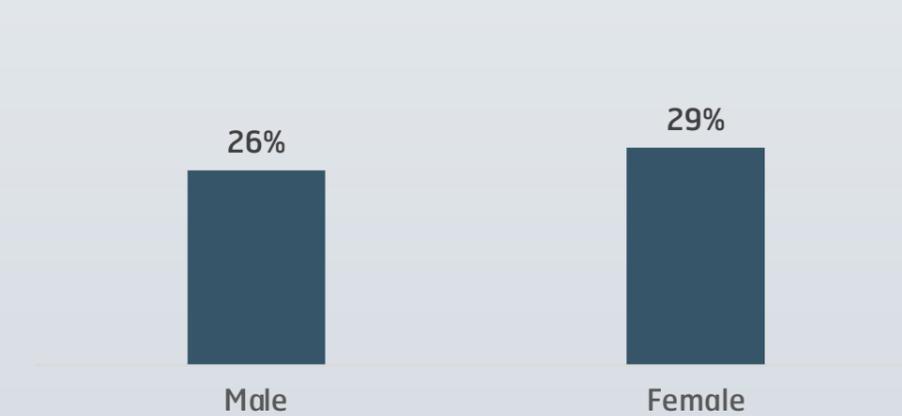
Priority boarding has become more important for passengers in India and Brazil.

Q14. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance for the enjoyment of your flying experience?

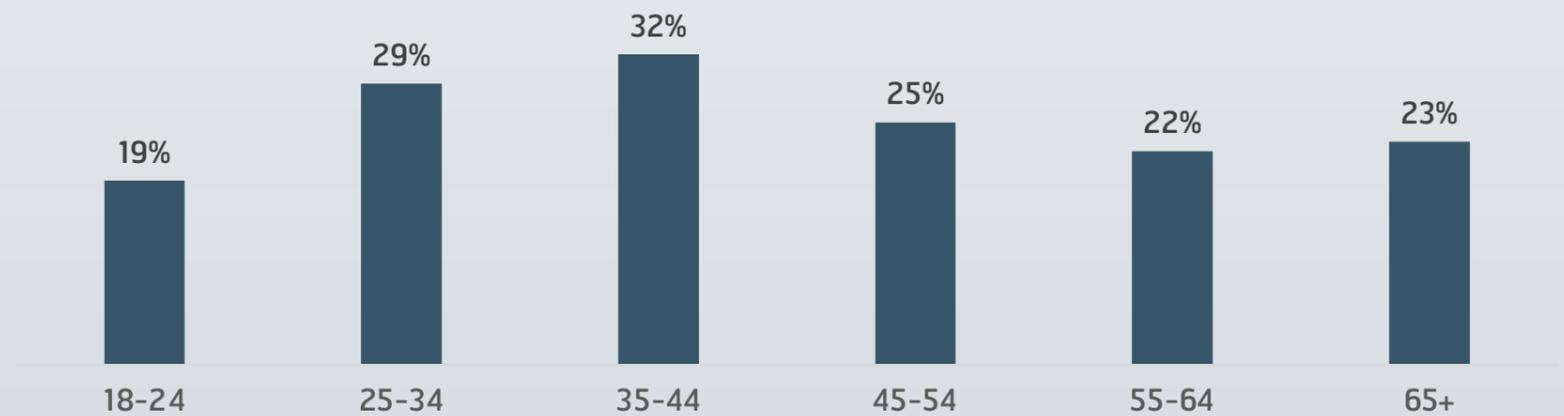
Priority Boarding



Net change in importance

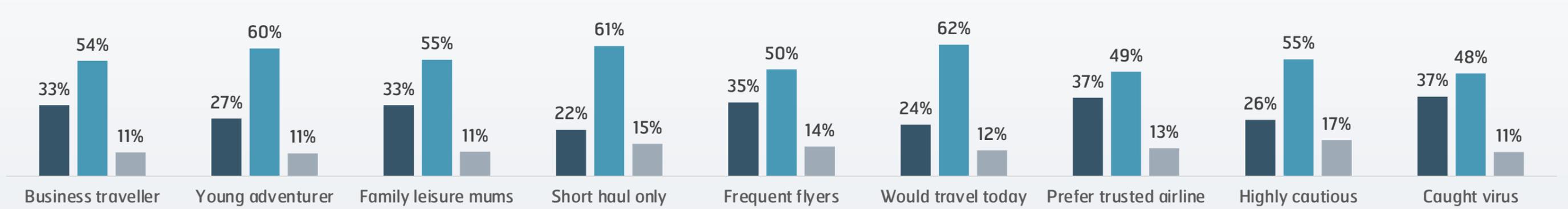


Net change in importance



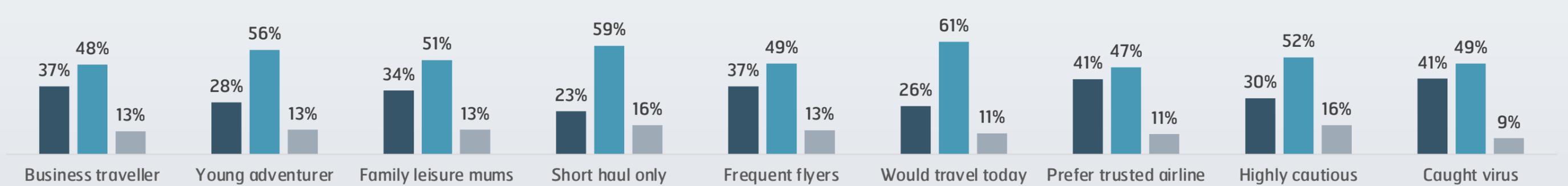
Q14. Inflight entertainment

■ MORE important ■ The SAME importance ■ LESS important



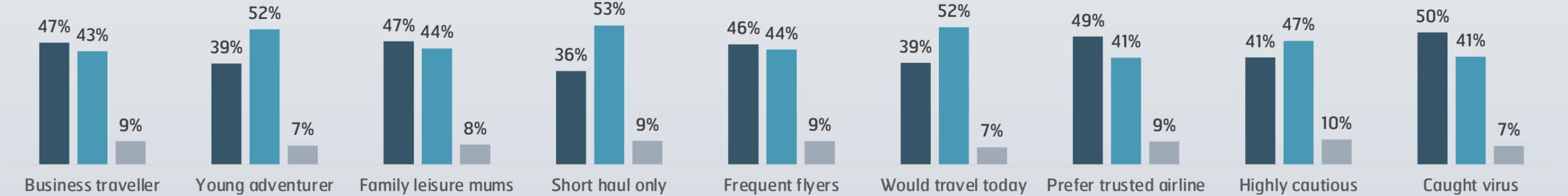
Q14. Inflight meal

■ MORE important ■ The SAME importance ■ LESS important



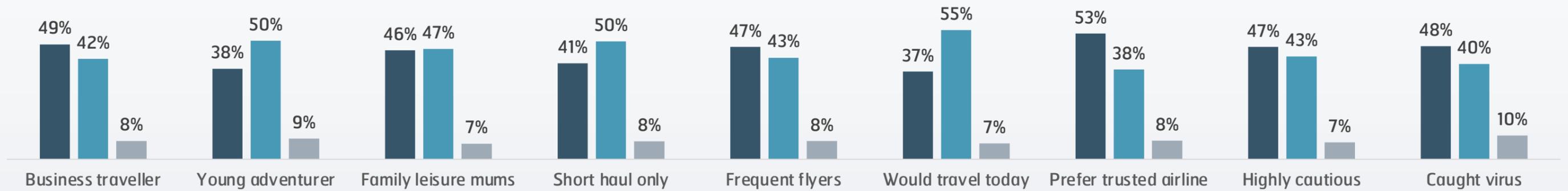
Q14. Inflight WiFi

■ MORE important ■ The SAME importance ■ LESS important



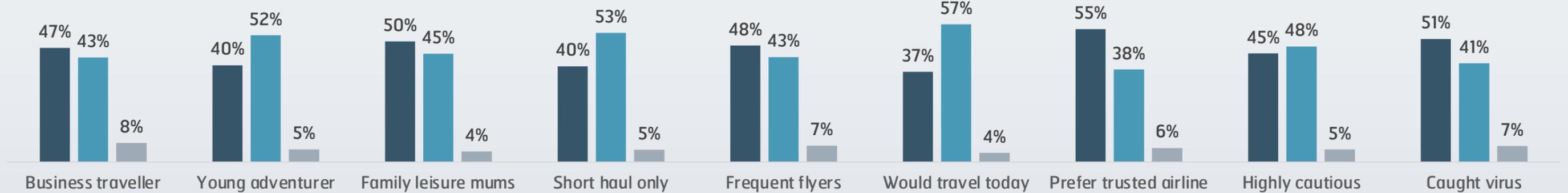
Q14. Extra leg room

■ MORE important ■ The SAME importance ■ LESS important



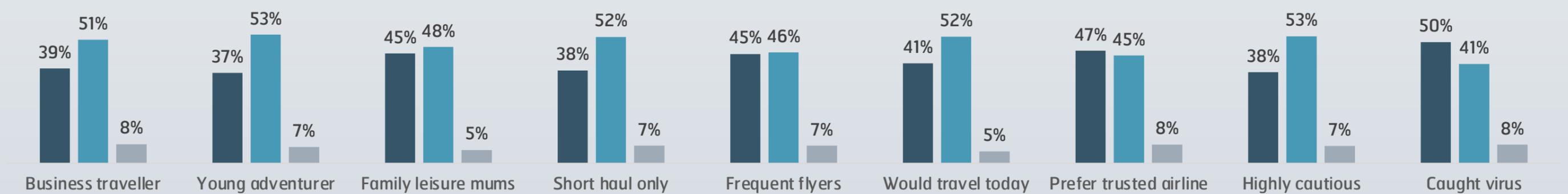
Q14. Service experience

■ MORE important ■ The SAME importance ■ LESS important



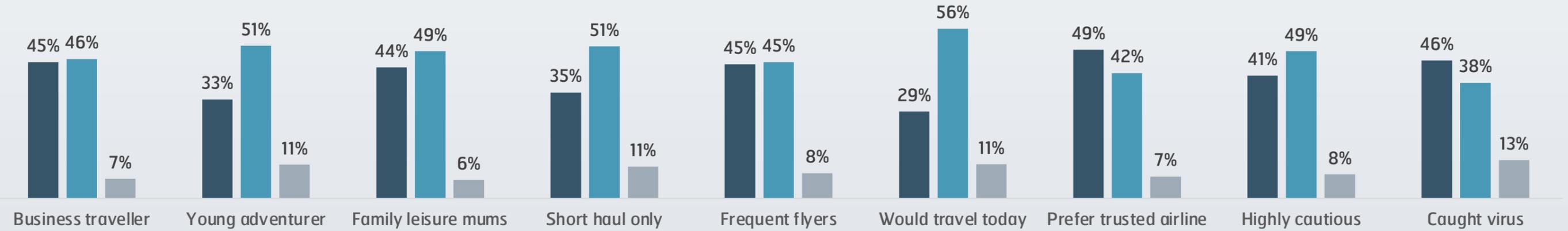
Q14. Free baggage

■ MORE important ■ The SAME importance ■ LESS important



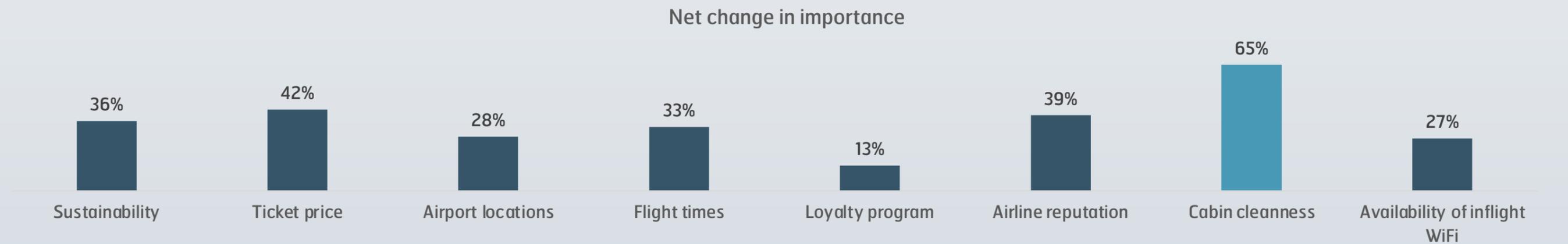
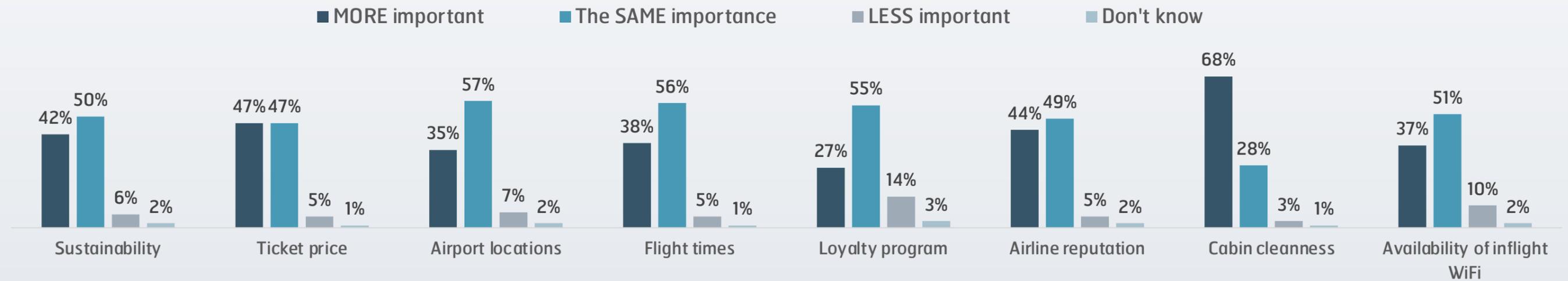
Q14. Priority boarding

■ MORE important ■ The SAME importance ■ LESS important



Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

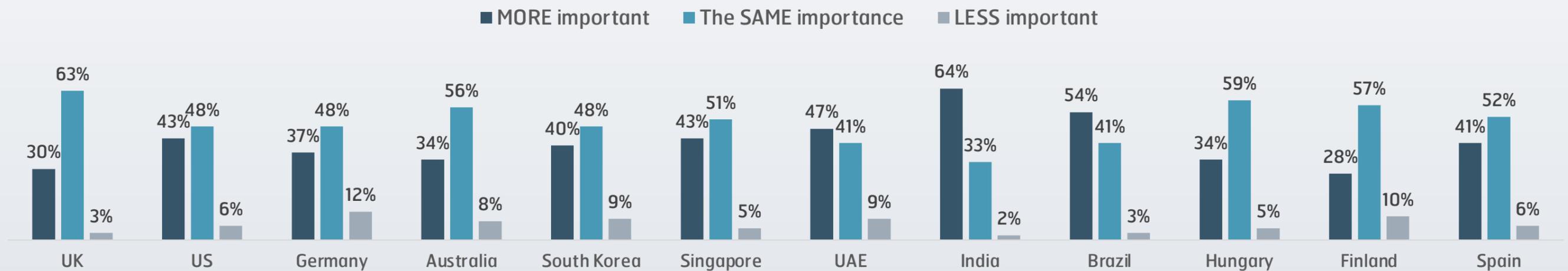
Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?



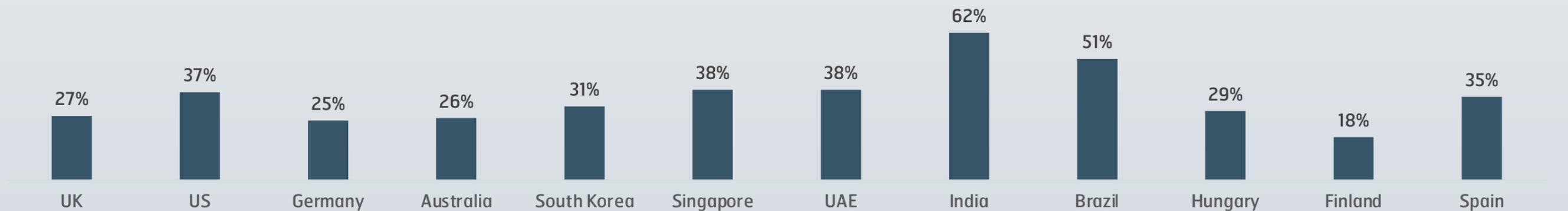
Cabin cleanness has become very important for passengers when choosing an airline.

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Sustainability



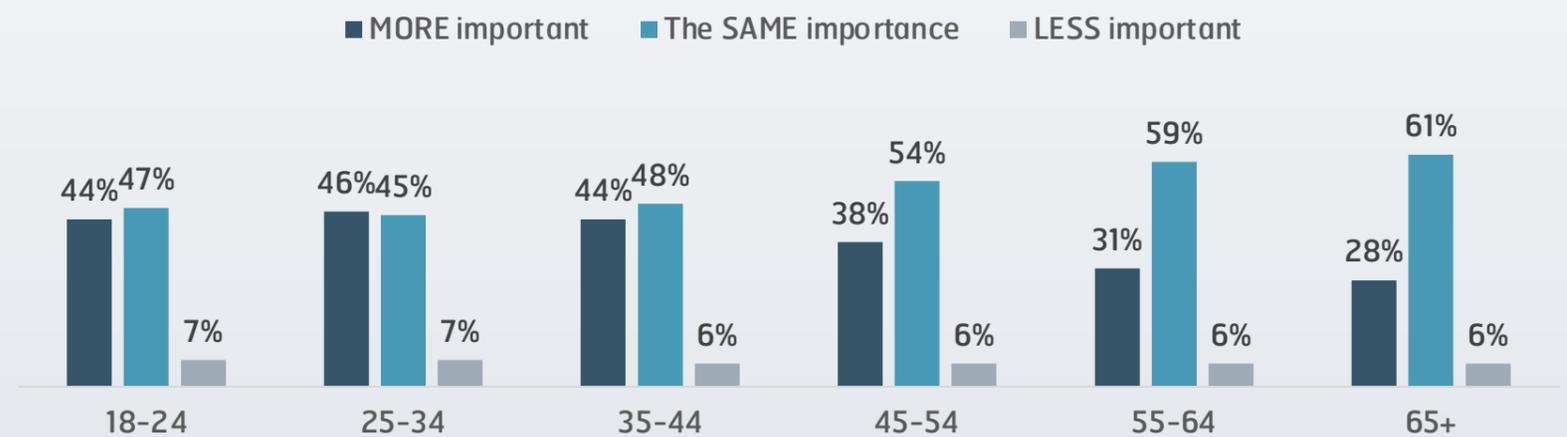
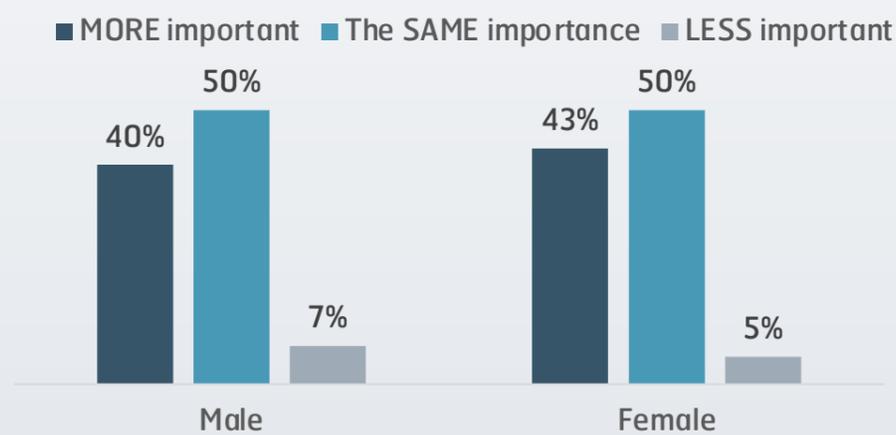
Net change in importance



64% of those surveyed in India believe sustainability has become even more important when choosing an airline today.

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

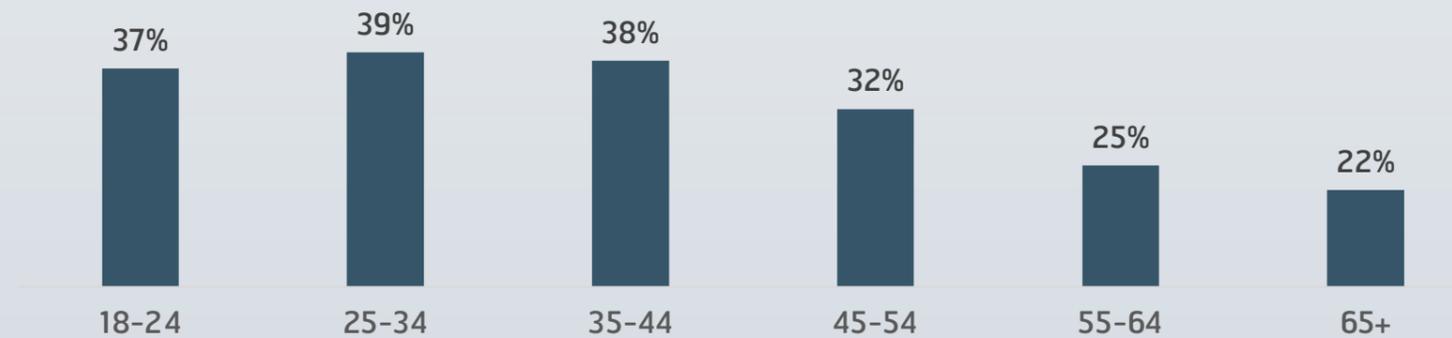
Sustainability



Net change in importance



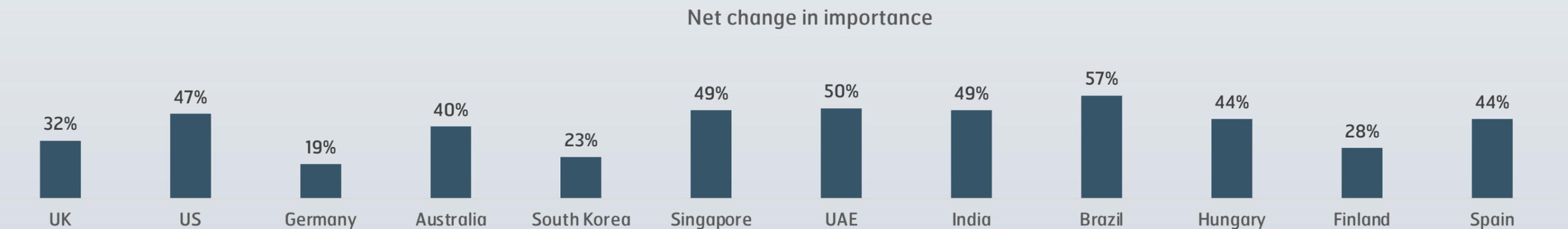
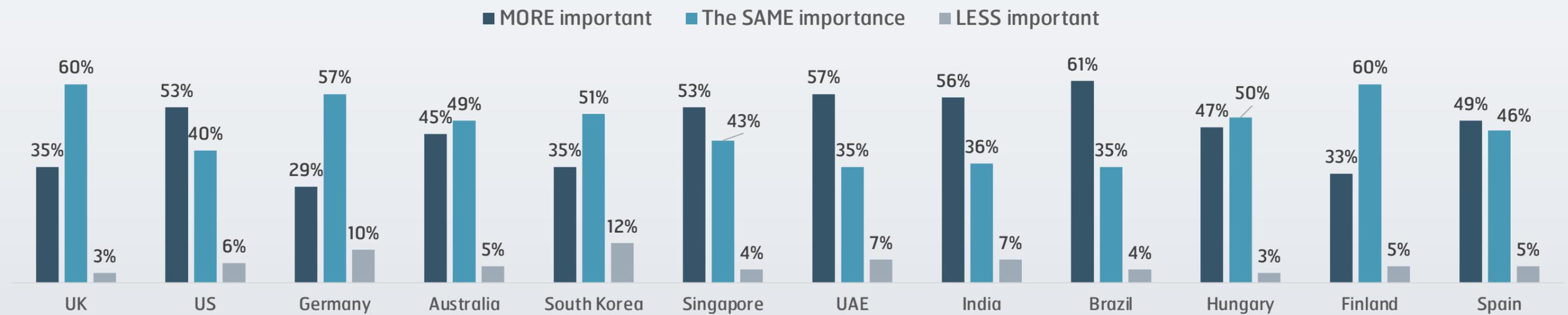
Net change in importance



Sustainability is an important factor for those ages 18-44

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

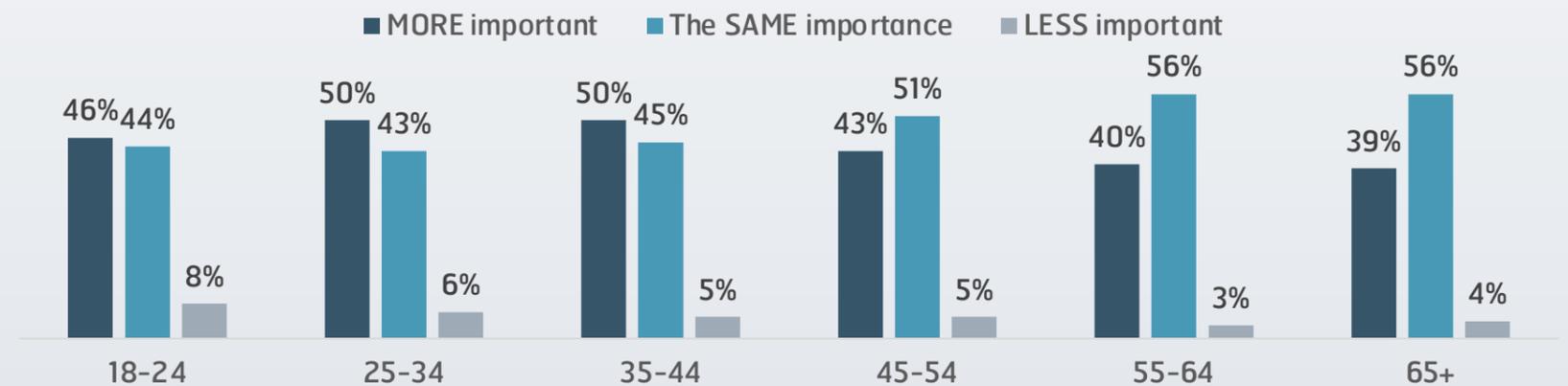
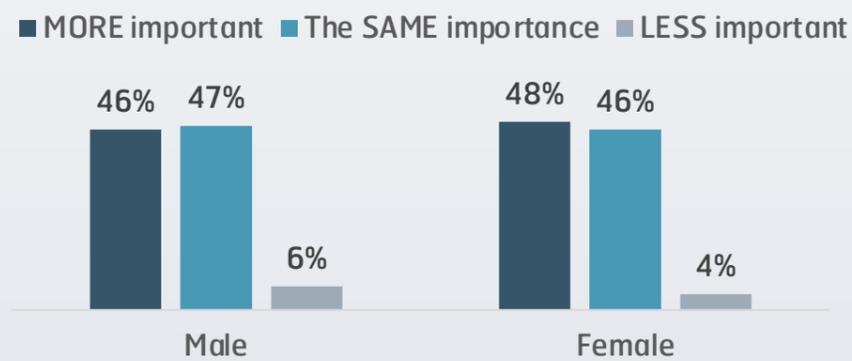
Ticket price



In Brazil, the price of a ticket has become more important today (61%) than before the pandemic hit

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

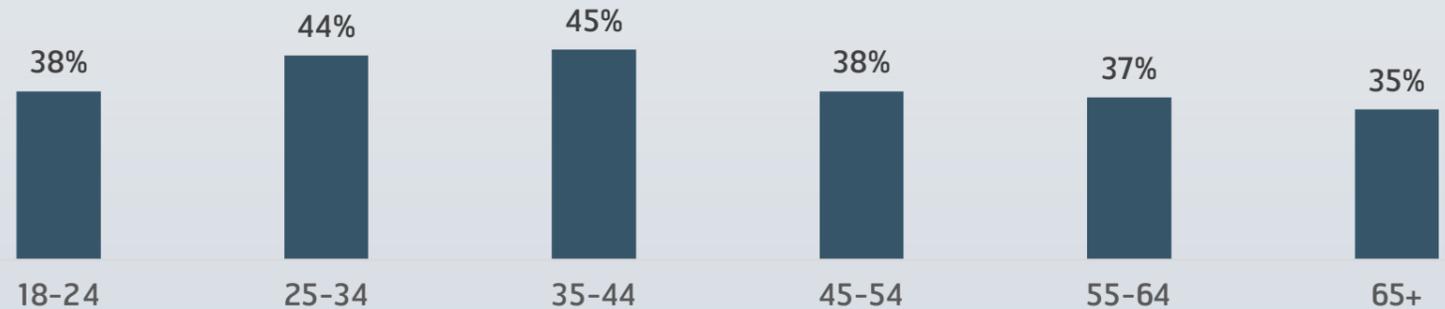
Ticket price



Net change in importance

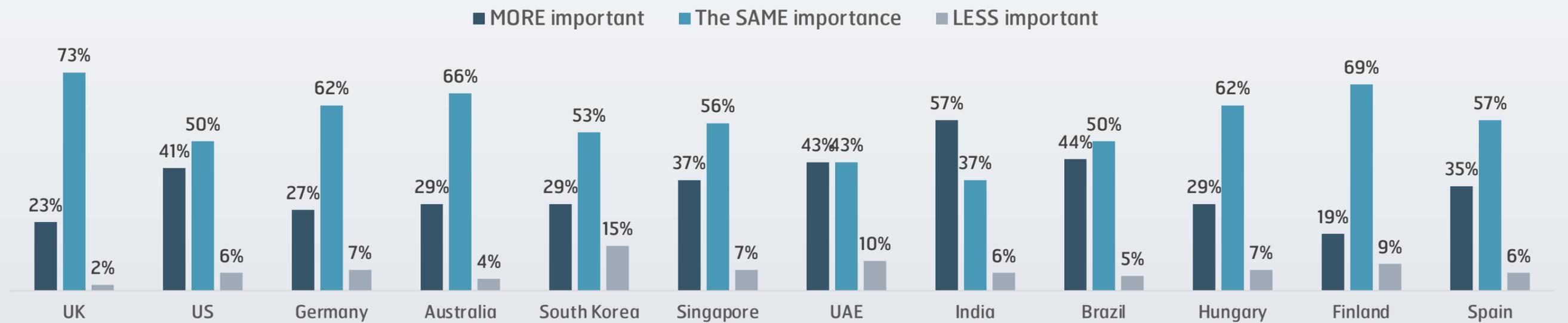


Net change in importance

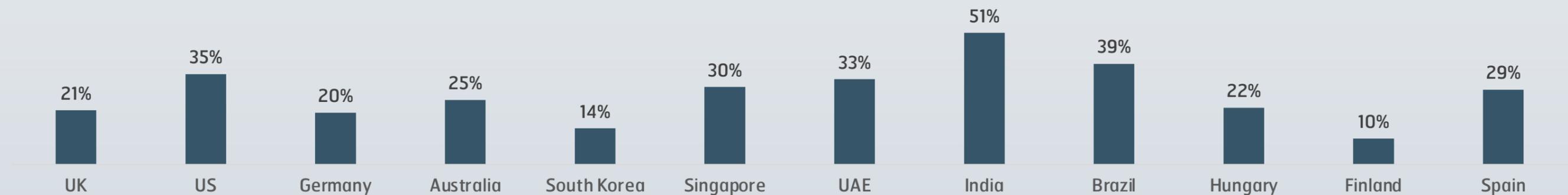


Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Airport locations



Net change in importance

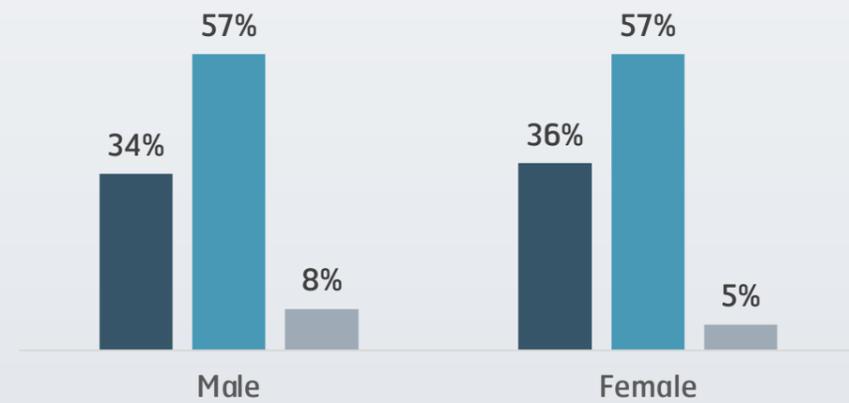


Airport locations are increasingly important for those in India, Brazil and the United States.

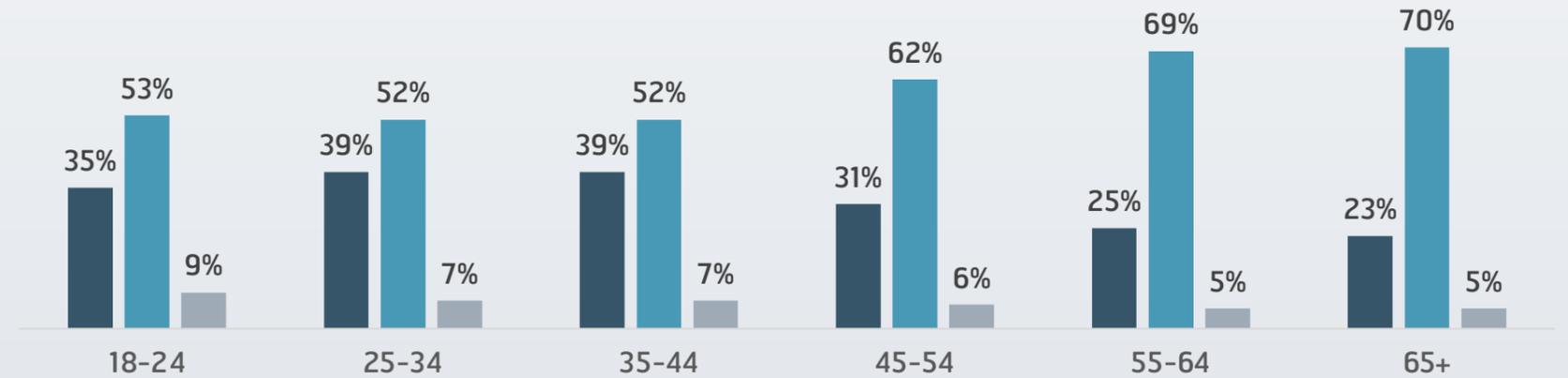
Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Airport locations

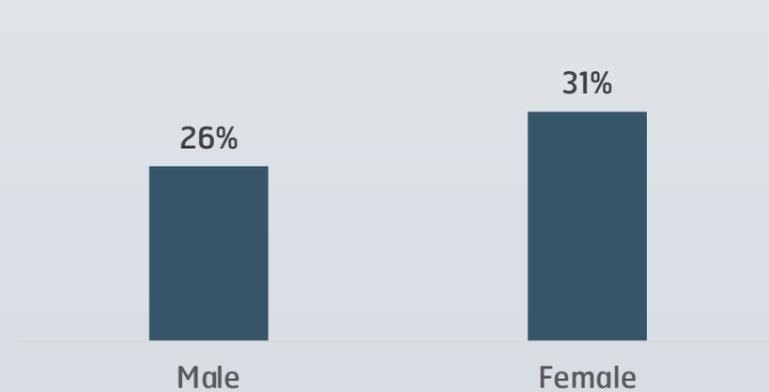
■ MORE important ■ The SAME importance ■ LESS important



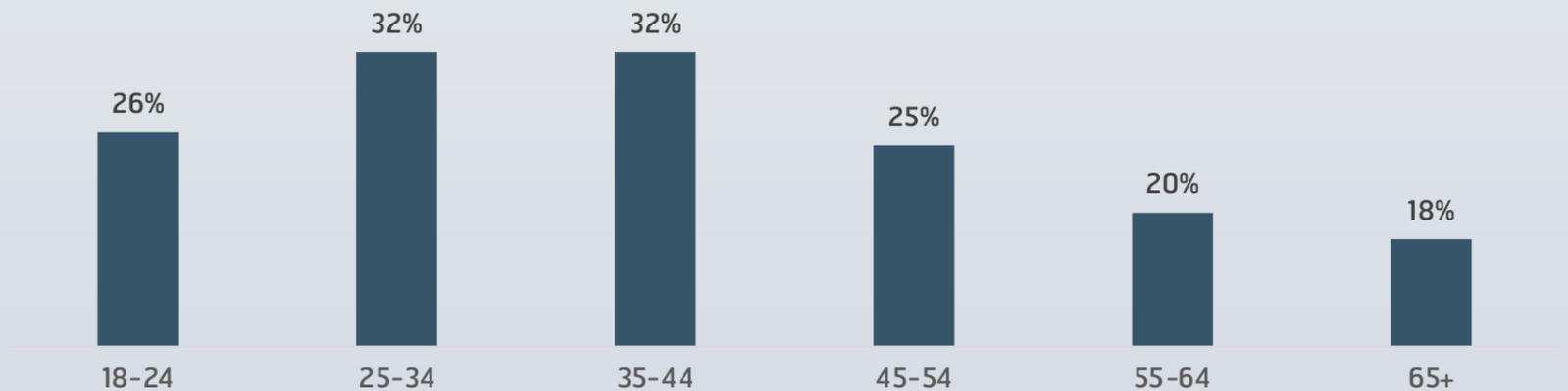
■ MORE important ■ The SAME importance ■ LESS important



Net change in importance

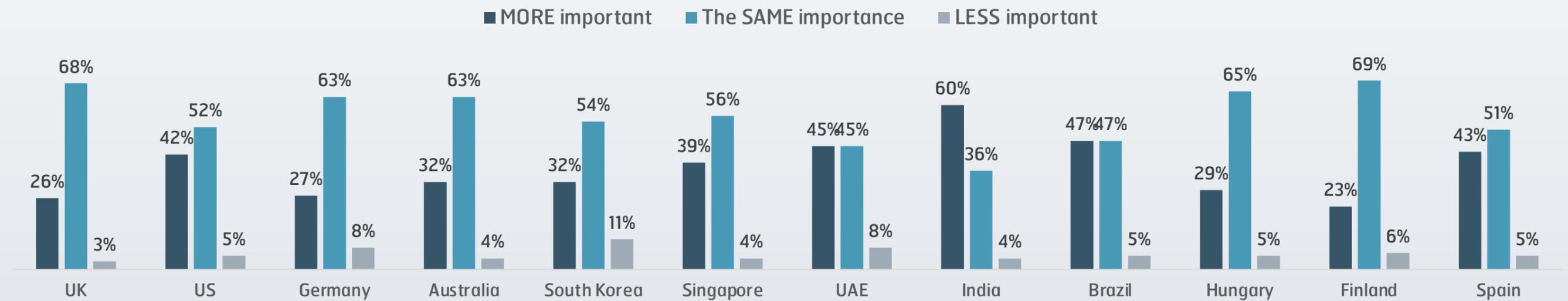


Net change in importance

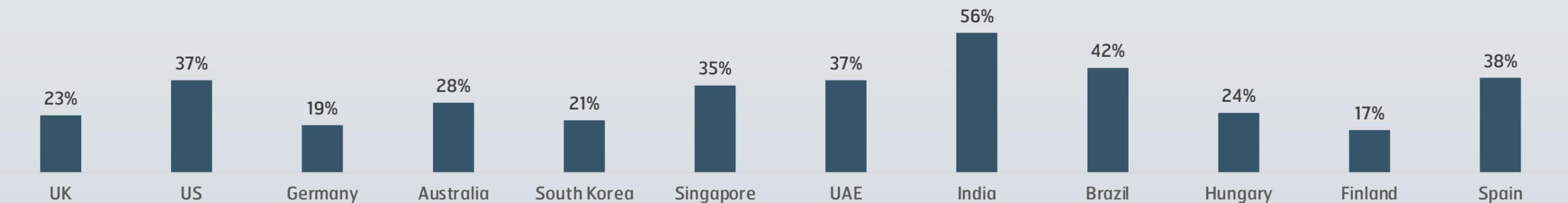


Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Flight times



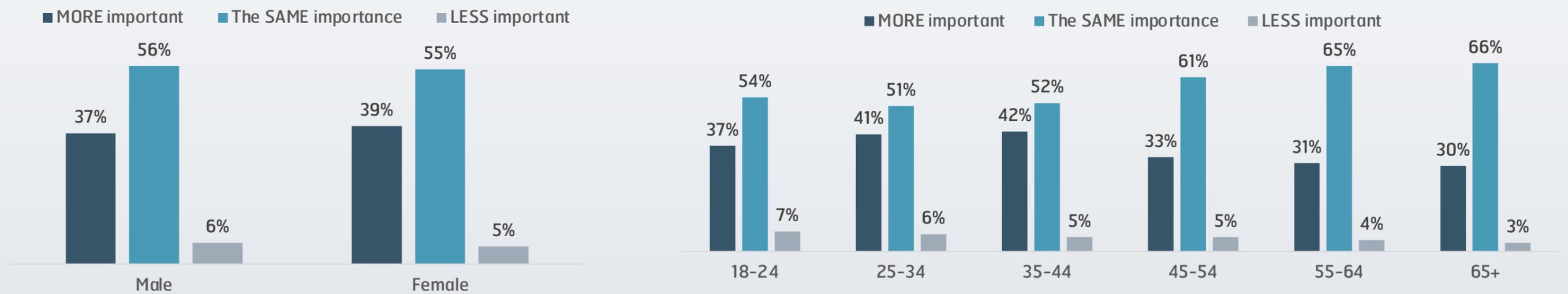
Net change in importance



60% of those surveyed in India believe flight times are now more important when choosing an airline.

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

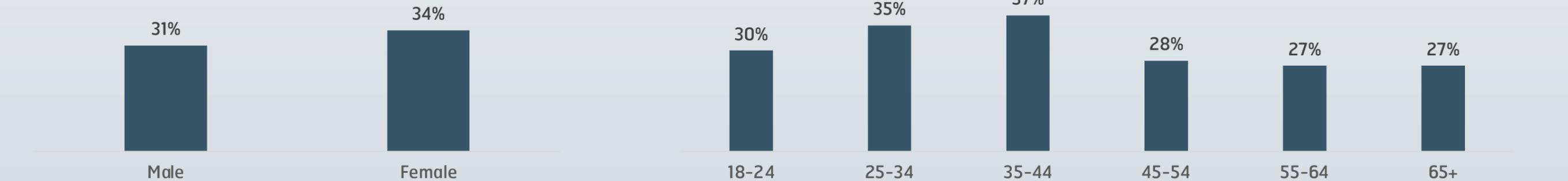
Flight times



Net change in importance

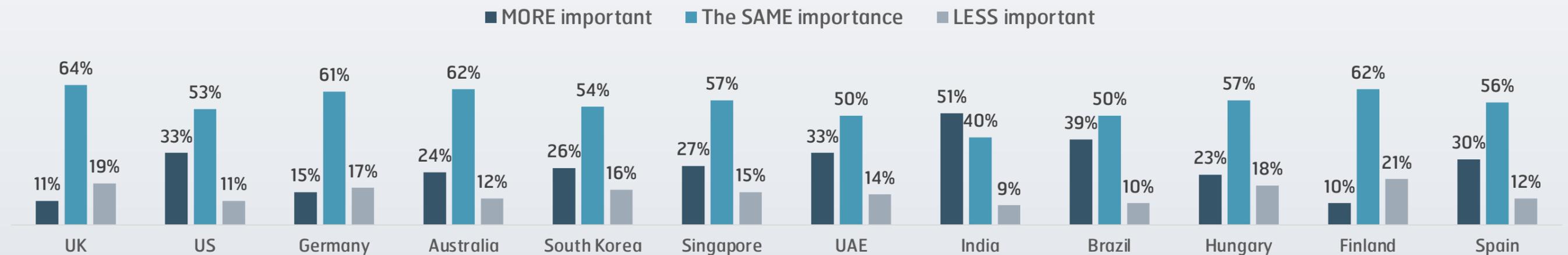


Net change in importance

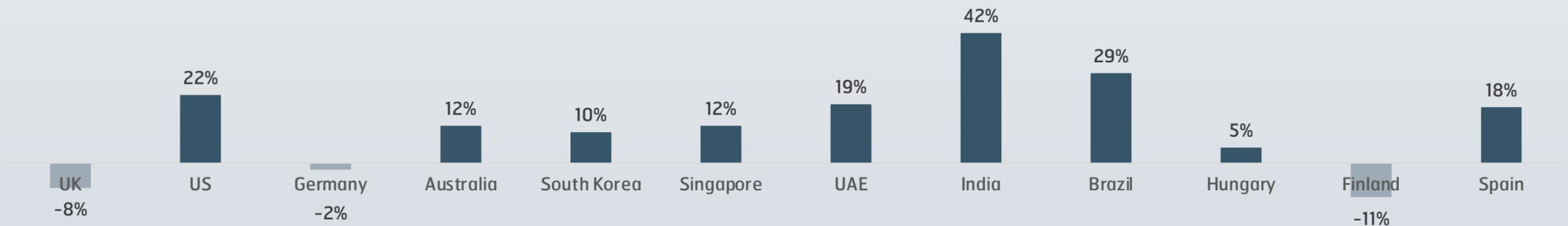


Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Loyalty Program



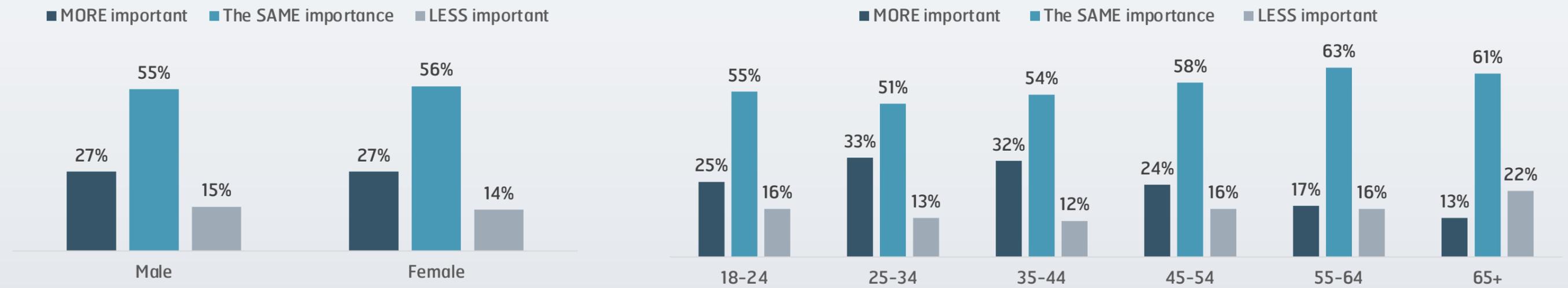
Net change in importance



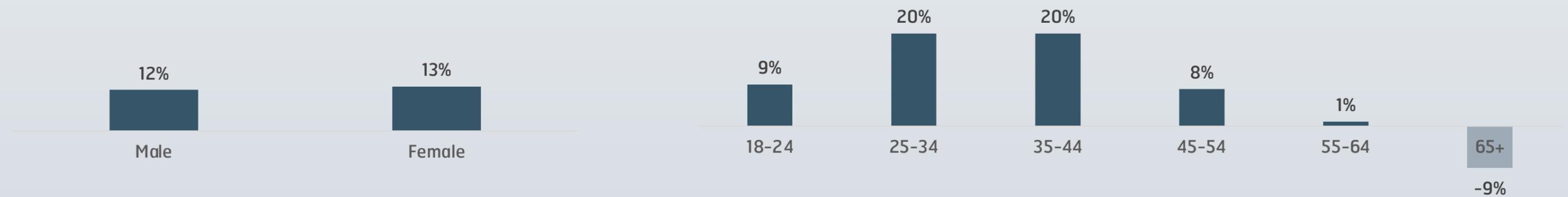
In India and Brazil, 42% and 29% respectively believe loyalty programs are now more important when choosing an airline.

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Loyalty Program

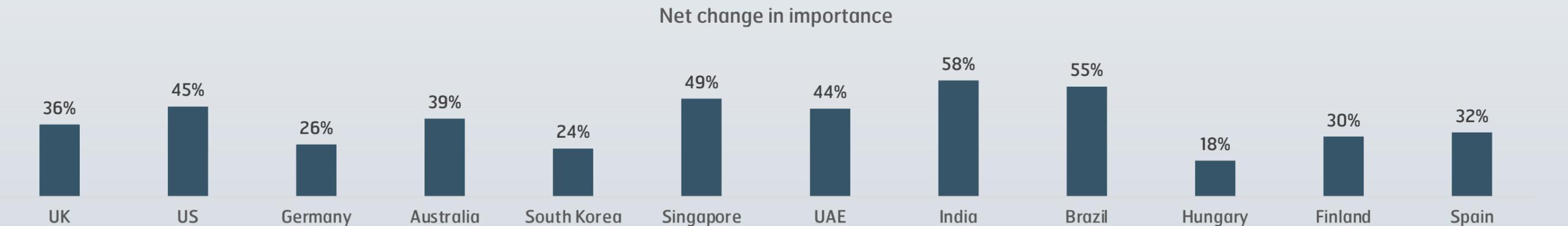
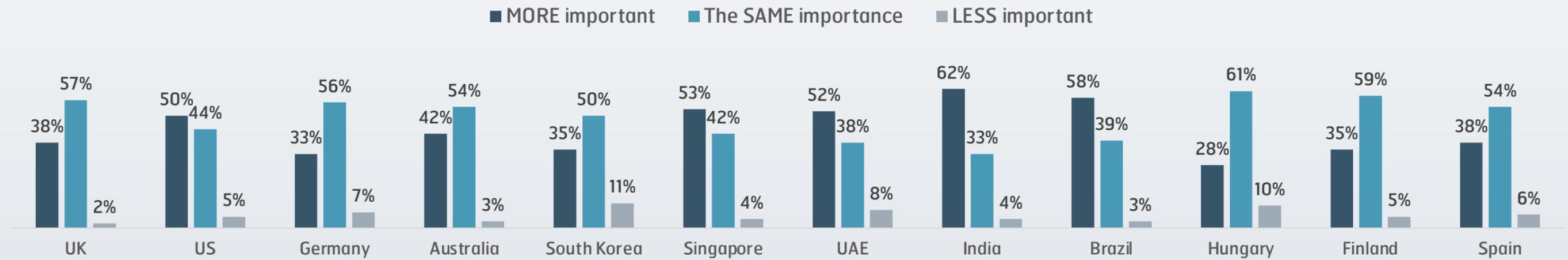


Net change in importance



Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

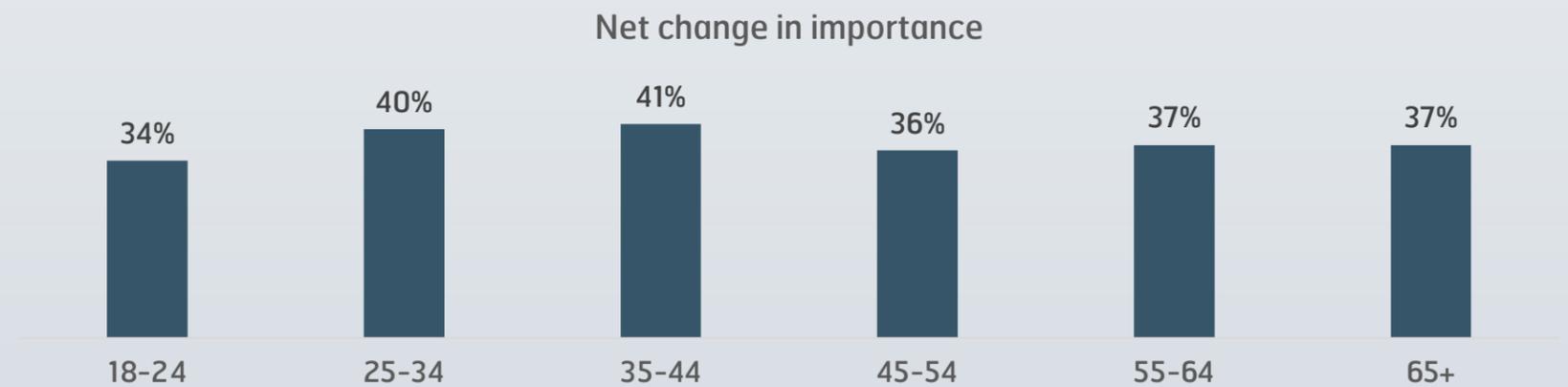
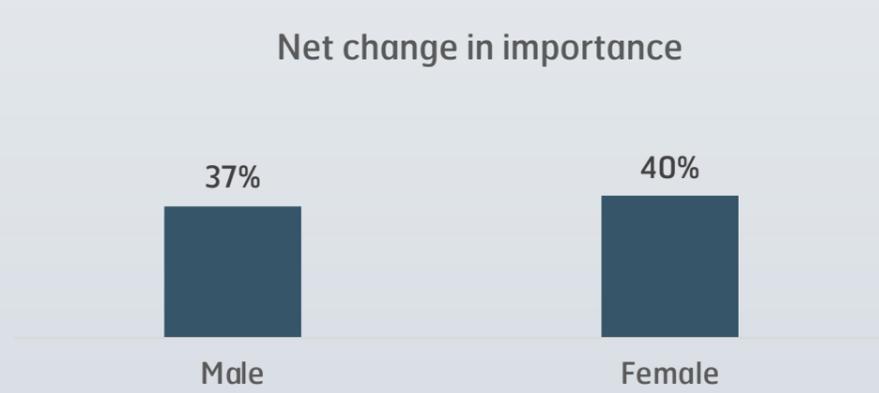
Airline Reputation



Almost half of passengers (44%) say that reputation is now a more significant factor when choosing an airline than it was pre-pandemic.

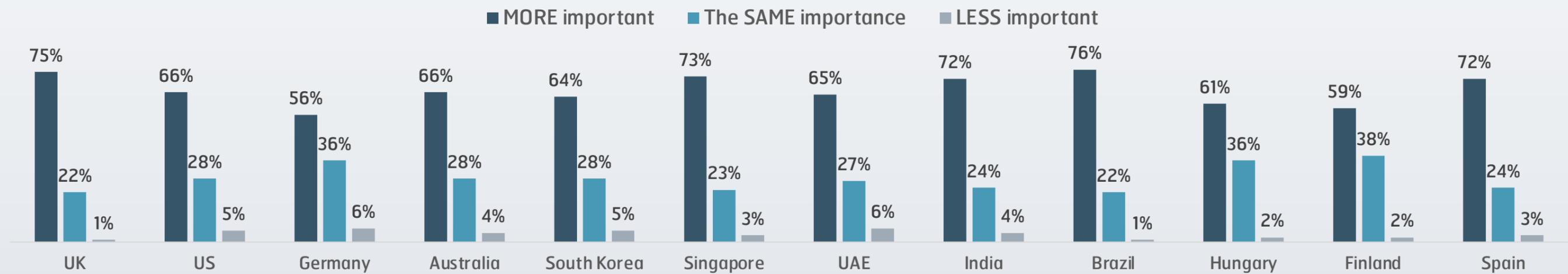
Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Airline Reputation

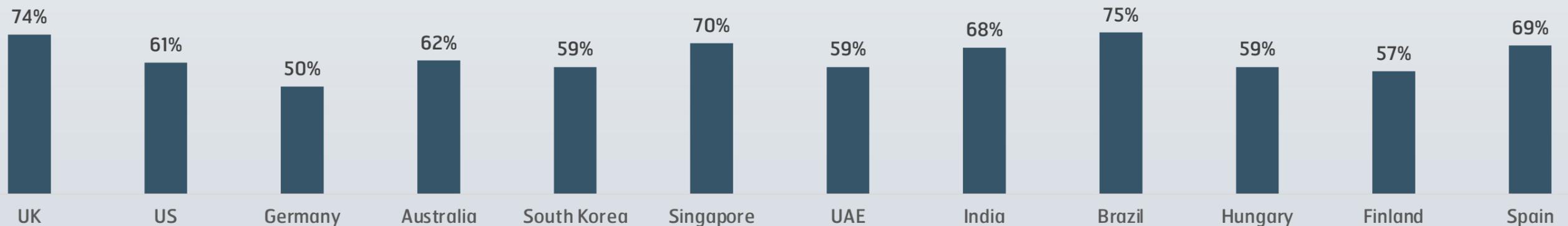


Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Cabin Cleanness



Net change in importance

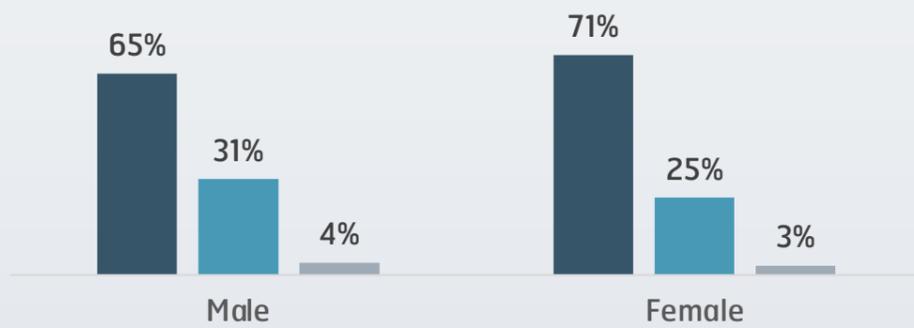


Cabin cleanliness across every region, has become even more important for travelers.

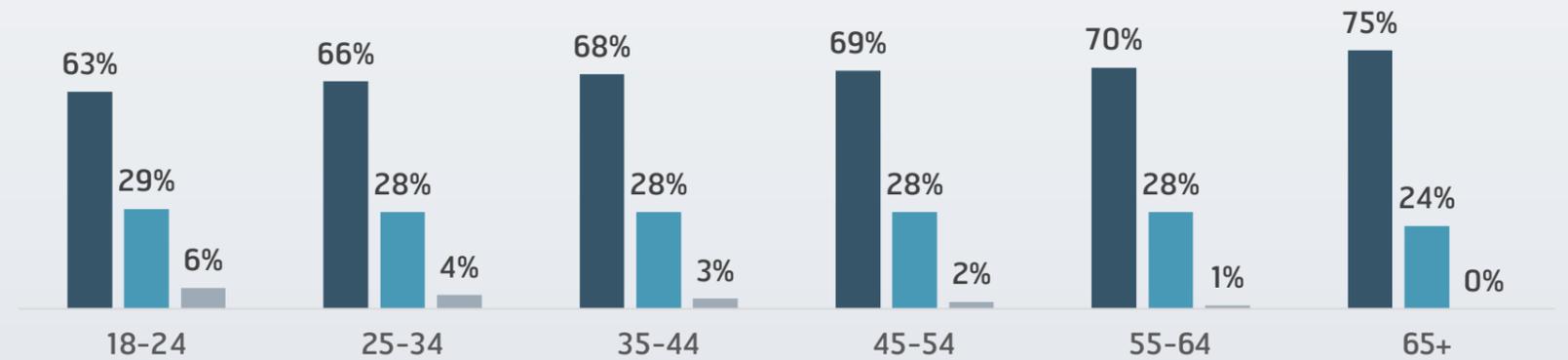
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Cabin Cleanness

■ MORE important ■ The SAME importance ■ LESS important



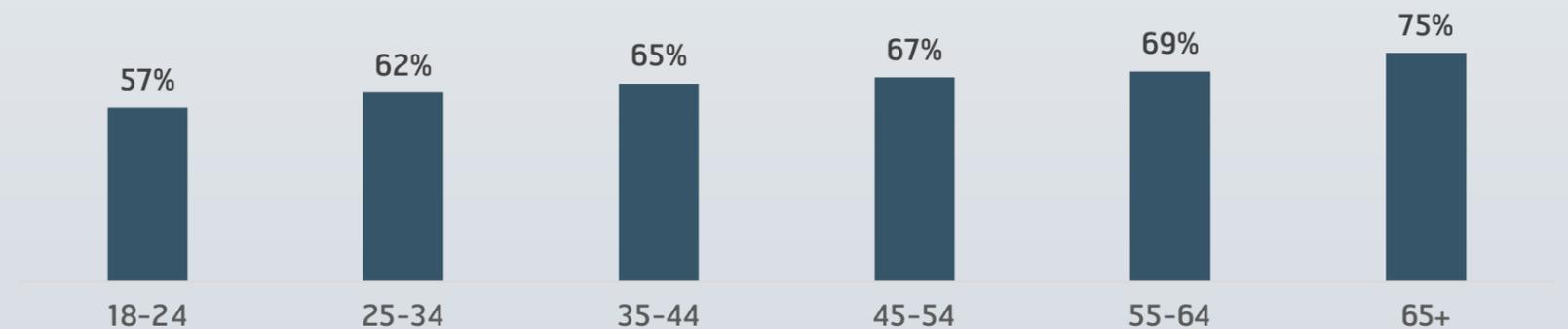
■ MORE important ■ The SAME importance ■ LESS important



Net change in importance

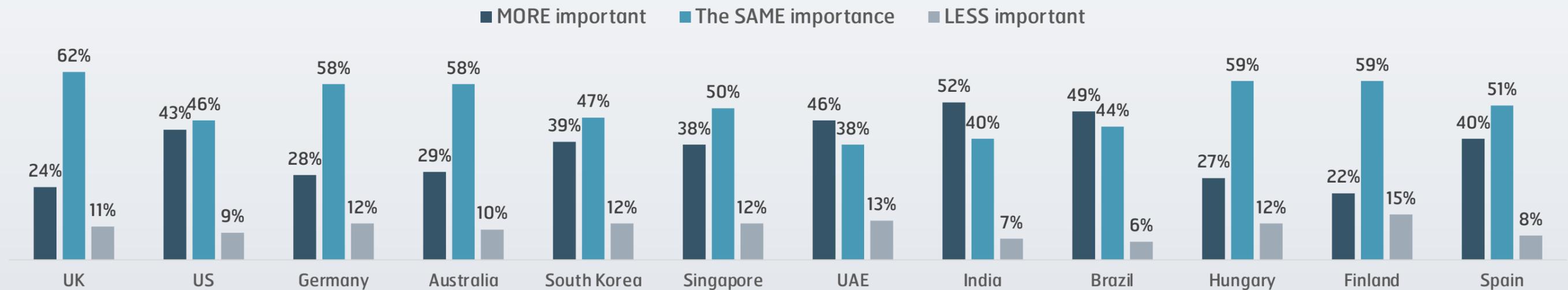


Net change in importance

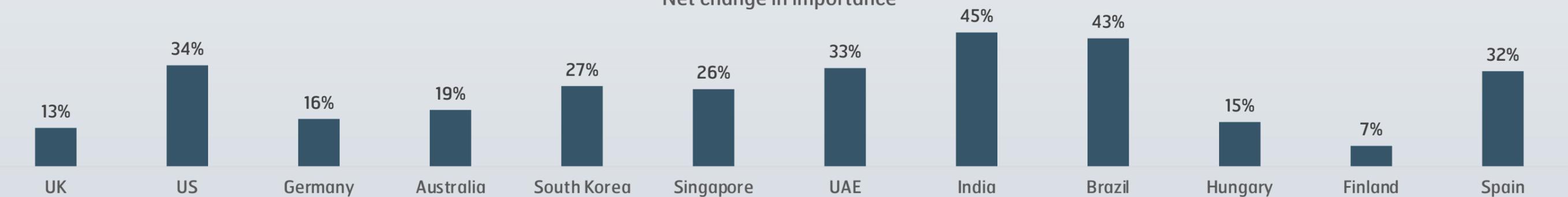


Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

Availability of inflight Wi-Fi



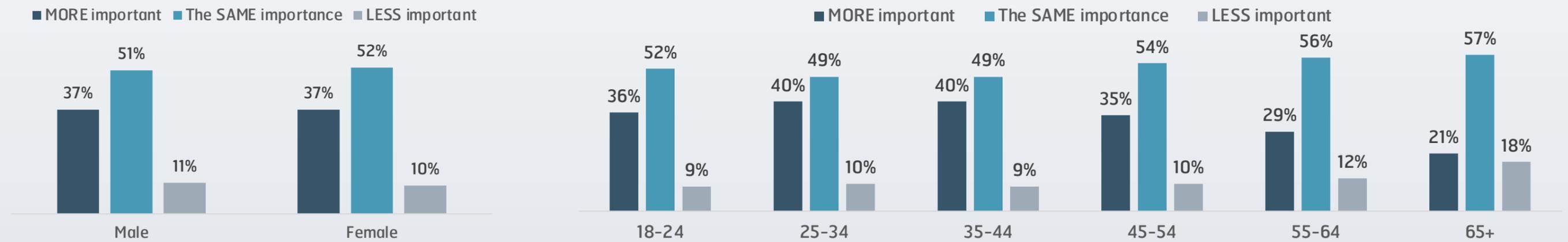
Net change in importance



Digital solutions, such as inflight Wi-Fi, have become an important factor when choosing an airline to fly with, especially for those in India, Brazil and the United States.

Q15. Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or of about the SAME importance when it comes to choosing an airline?

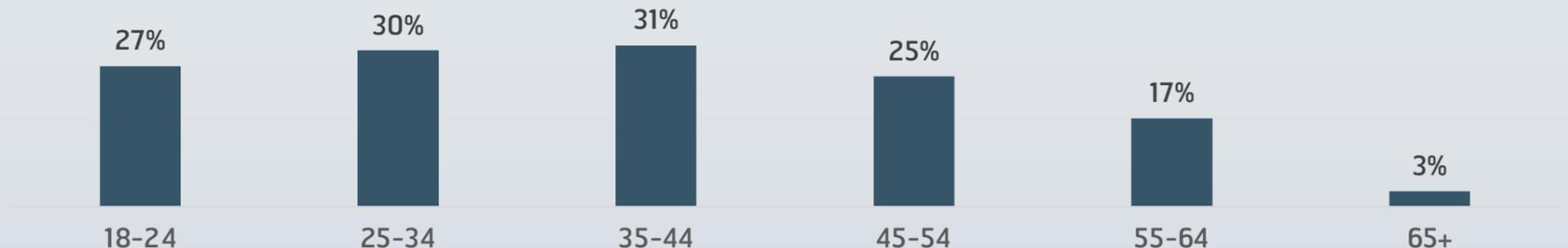
Availability of inflight Wi-Fi



Net change in importance



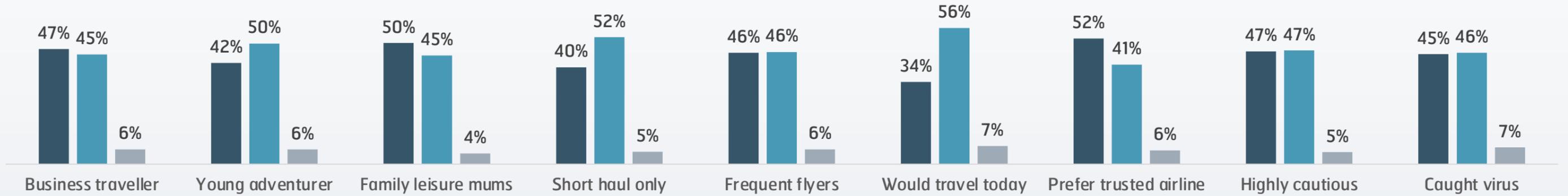
Net change in importance



For those over the age of 65, inflight Wi-Fi is less of a motivating factor when choosing an airline.

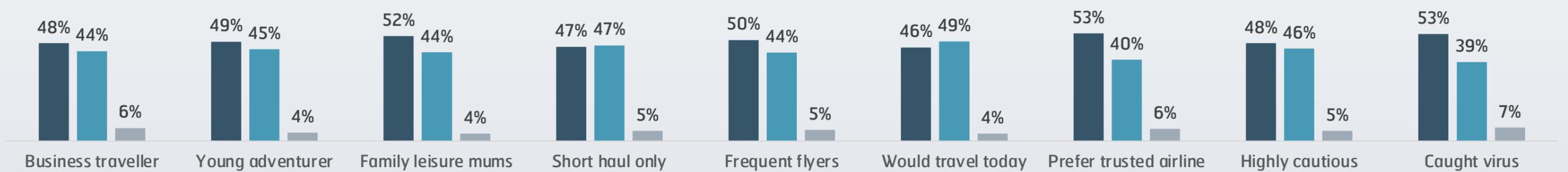
Q15. Sustainability

■ MORE important ■ The SAME importance ■ LESS important



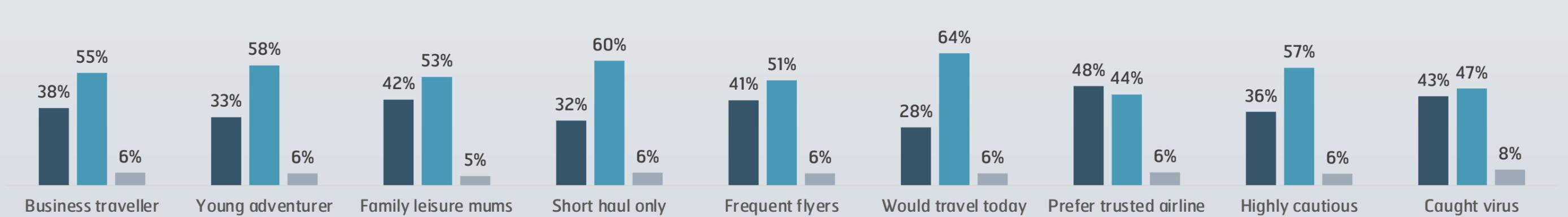
Q15. Ticket price

■ MORE important ■ The SAME importance ■ LESS important



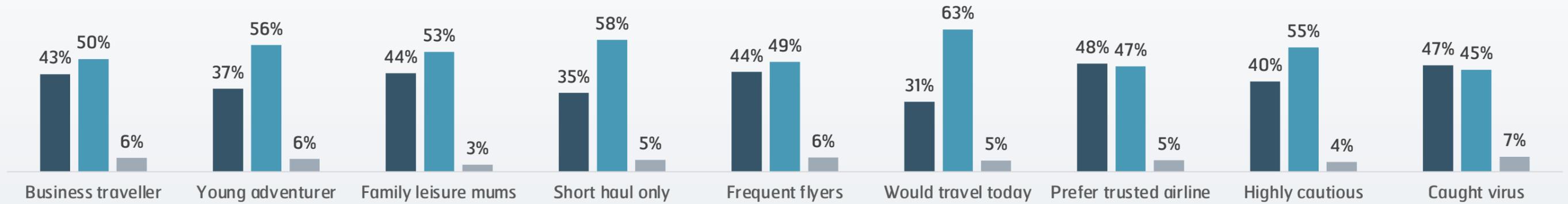
Q15. Airport locations

■ MORE important ■ The SAME importance ■ LESS important



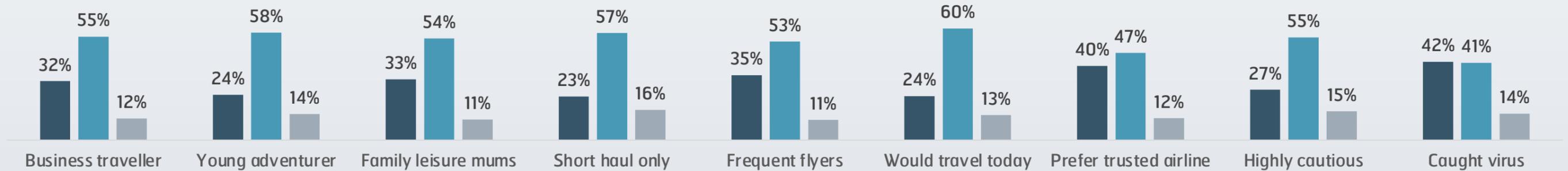
Q15. Flight times

■ MORE important ■ The SAME importance ■ LESS important



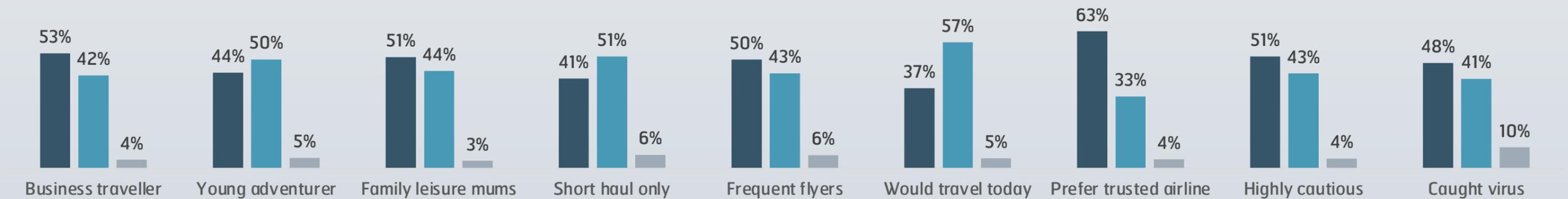
Q15. Loyalty program

■ MORE important ■ The SAME importance ■ LESS important



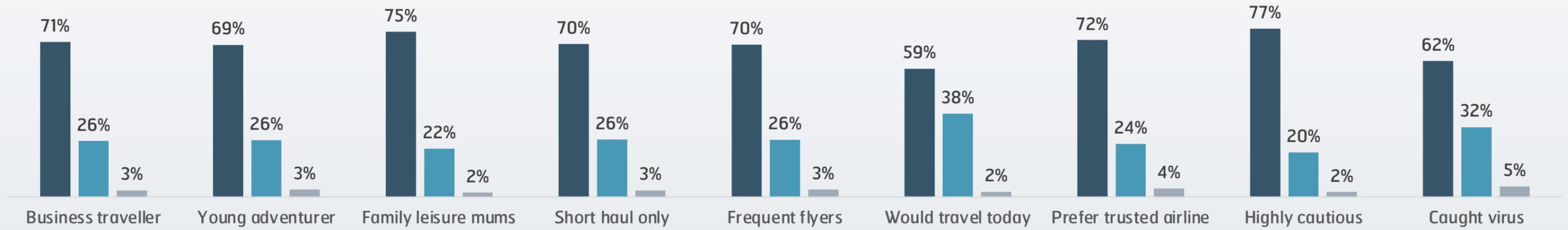
Q15. Airline reputation

■ MORE important ■ The SAME importance ■ LESS important



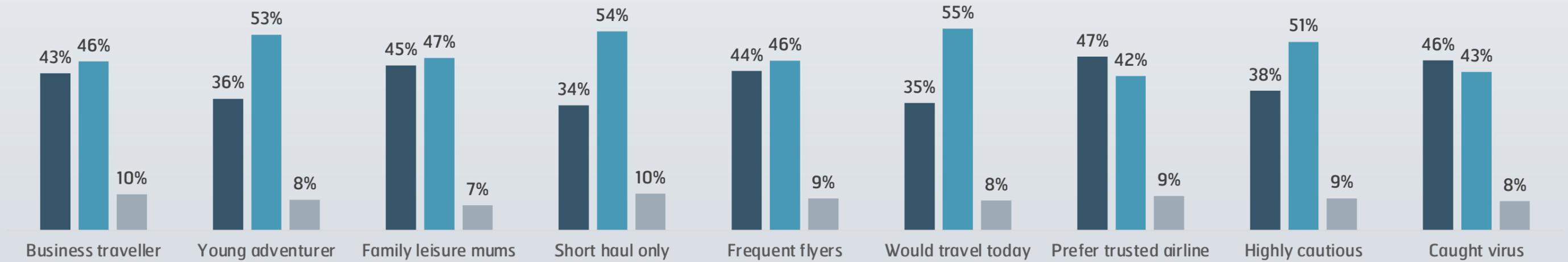
Q15. Cabin cleanliness

■ MORE important ■ The SAME importance ■ LESS important



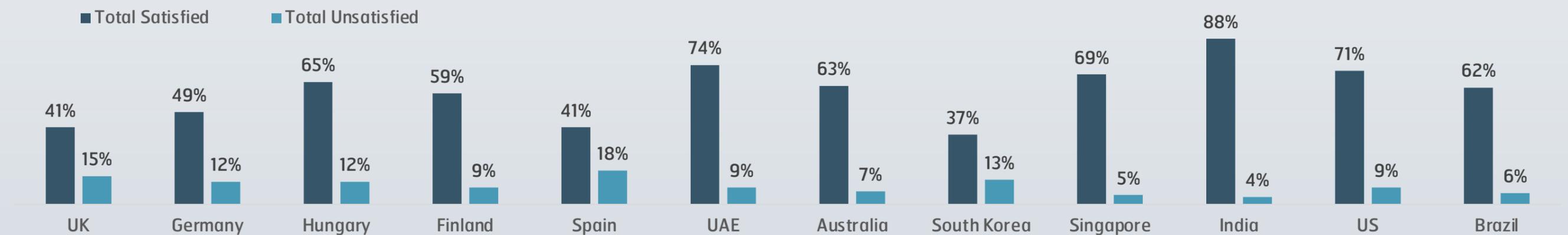
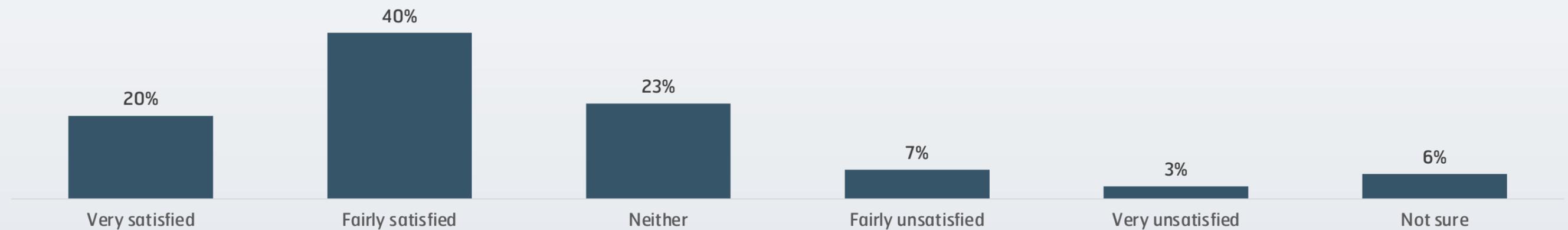
Q15. Availability of inflight WiFi

■ MORE important ■ The SAME importance ■ LESS important



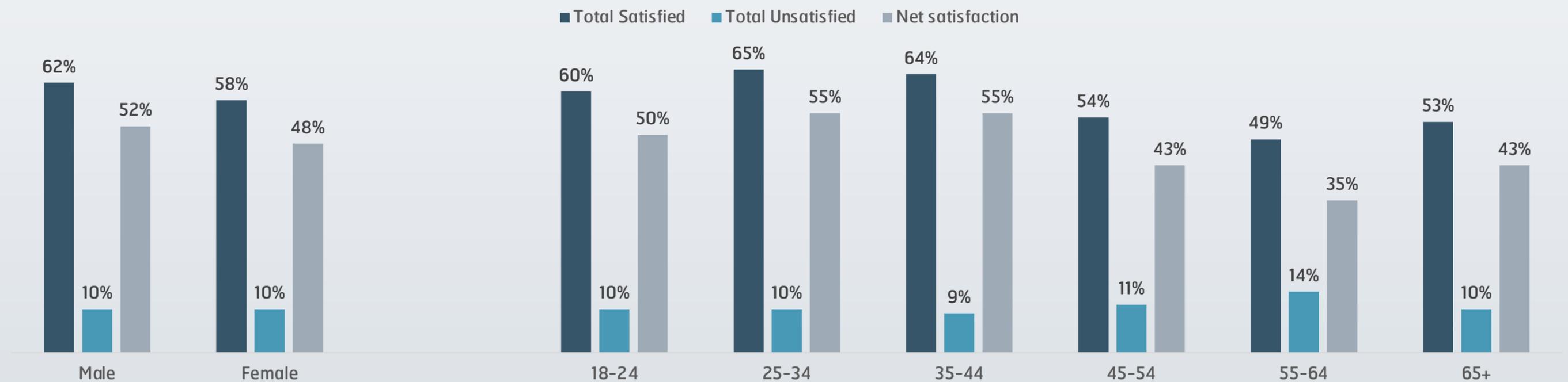
Q16. To what extent have you been satisfied or unsatisfied with airlines' response to the pandemic?

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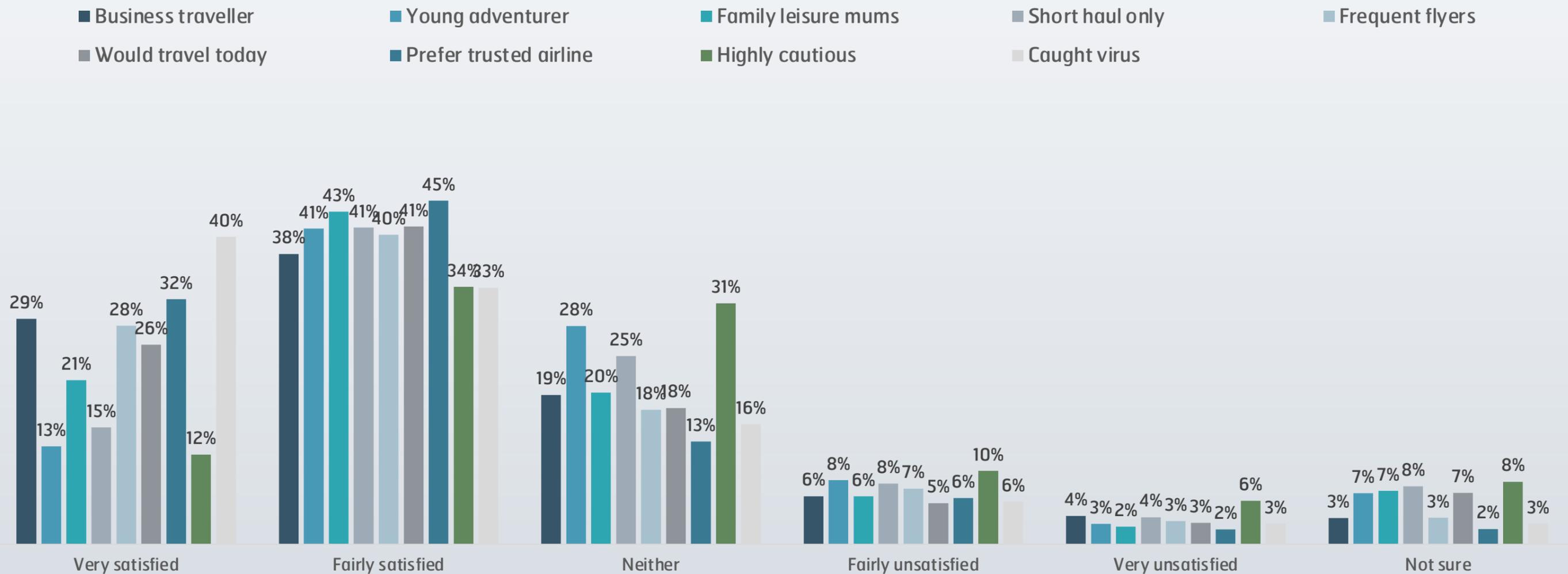
APAC countries are generally more likely to be satisfied with airlines' response to the pandemic than European countries – with the UK and Spain most likely to be unsatisfied.

Q16. To what extent have you been satisfied or unsatisfied with airlines' response to the pandemic?



60% feel satisfied with the aviation industry's response to the crisis

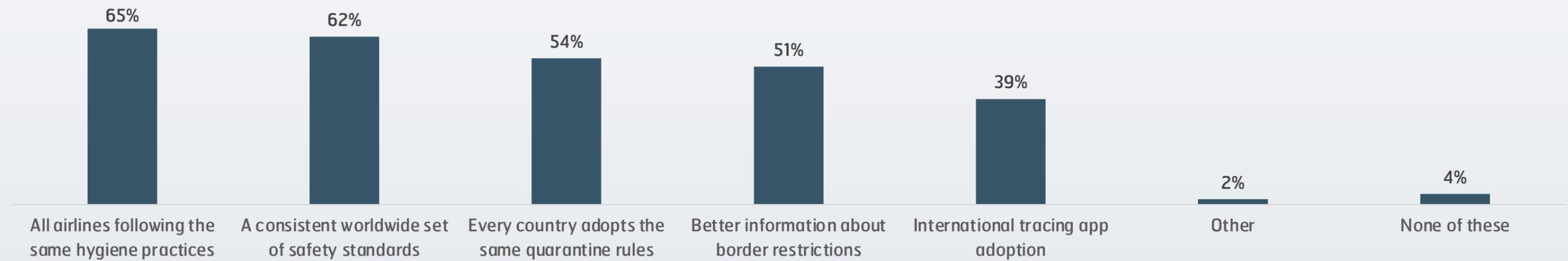
Q16. To what extent have you been satisfied or unsatisfied with airlines' response to the pandemic?



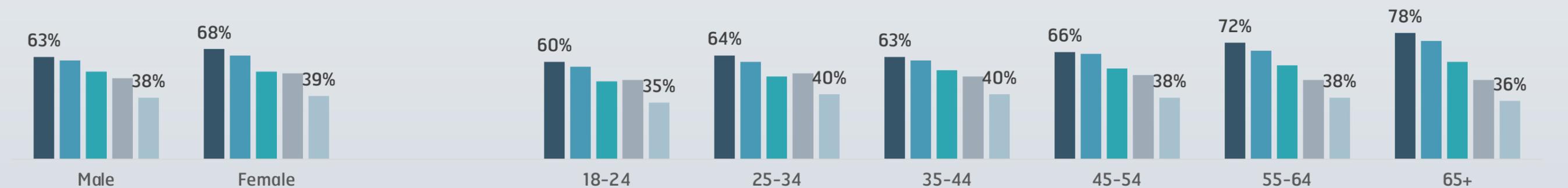
Overall, passengers have been satisfied with airlines' response to the pandemic.

Q17. What else could airlines and the travel industry do to make you feel more confident about flying?

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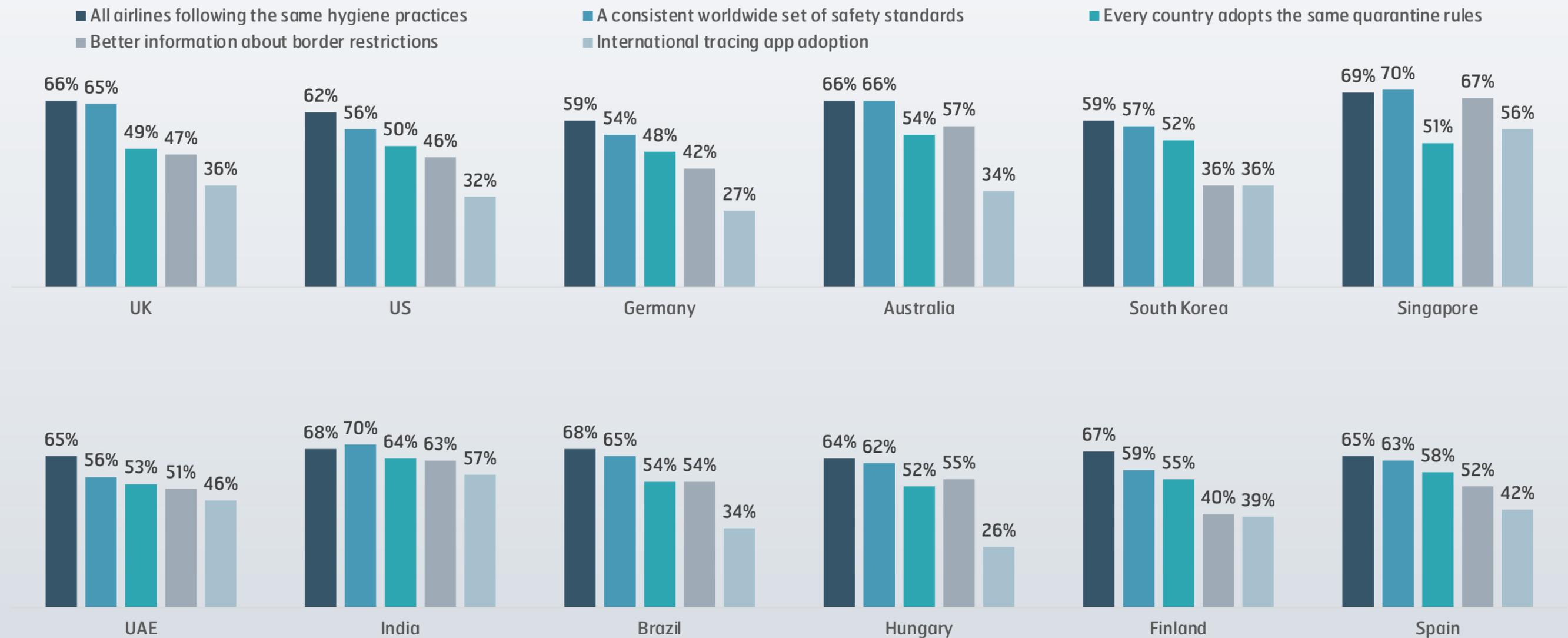


■ All airlines following the same hygiene practices
 ■ A consistent worldwide set of safety standards
 ■ Every country adopts the same quarantine rules
■ Better information about border restrictions
 ■ International tracing app adoption



The results show a desire for airlines, airports and governments to implement a consistent set of measures to make the journey itself as safe as possible.

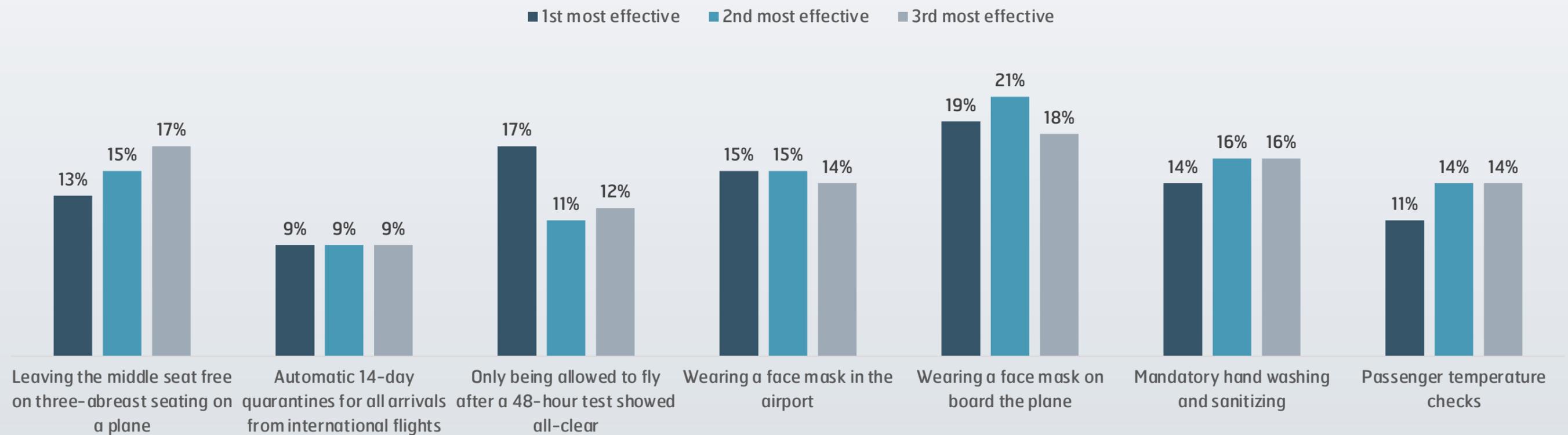
Q17. What else could airlines and the travel industry do to make you feel more confident about flying?



Hygiene practices are a number one concern for respondents across most regions.

Q18. Select the top three overall travel precautions you believe are most effective for personal safety

Q18. Select the top three overall travel precautions you believe are most effective for personal safety.

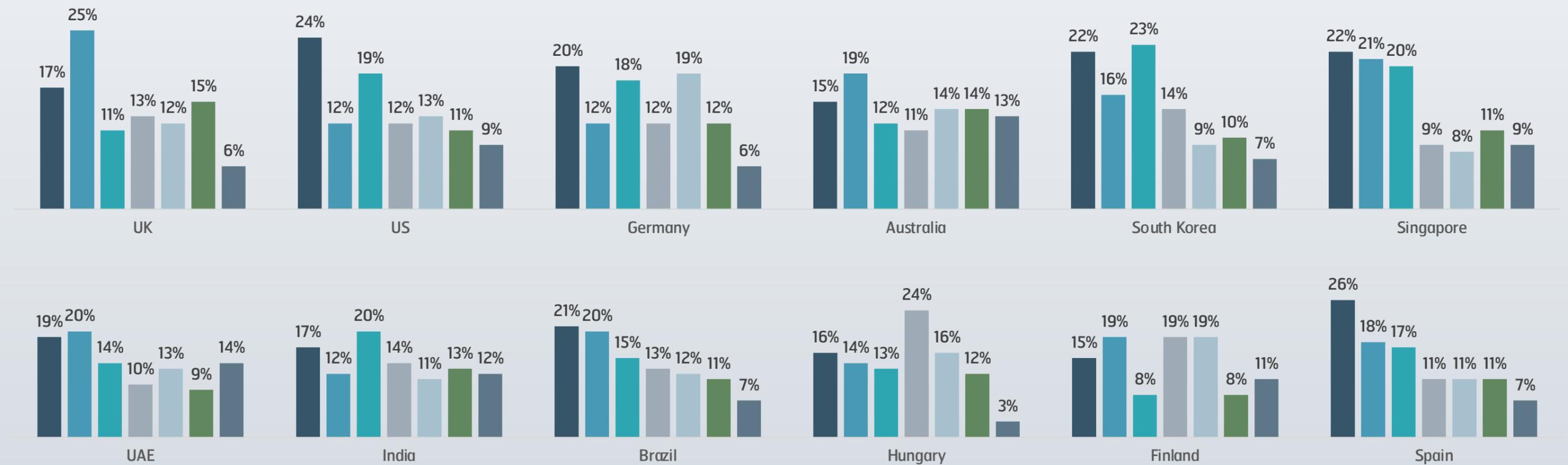


Passengers have disregarded the automatic 14-day quarantine as a catch-all solution

Q18. Select the top three overall travel precautions you believe are most effective for personal safety.

Number one choice for most effective

- Wearing a face mask on board the plane
- Wearing a face mask in the airport
- Leaving the middle seat free on three-abreast seating on a plane
- Automatic 14-day quarantines for all arrivals from international flights
- Only being allowed to fly after a 48-hour test showed all-clear
- Mandatory hand washing and sanitizing
- Passenger temperature checks

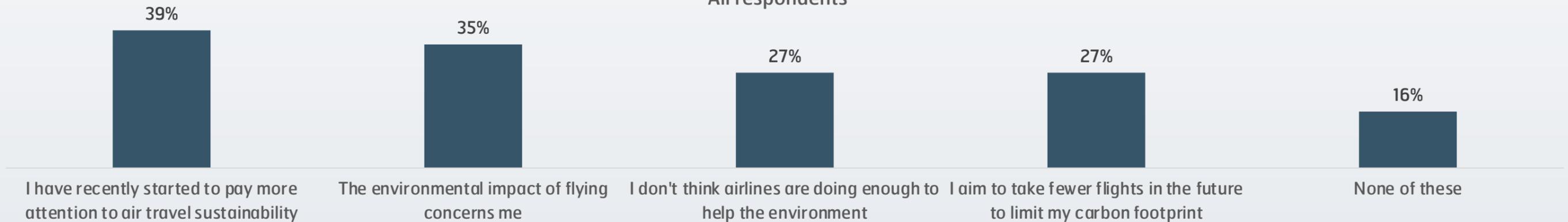


Mandatory face coverings are believed to be the most effective for personal safety.

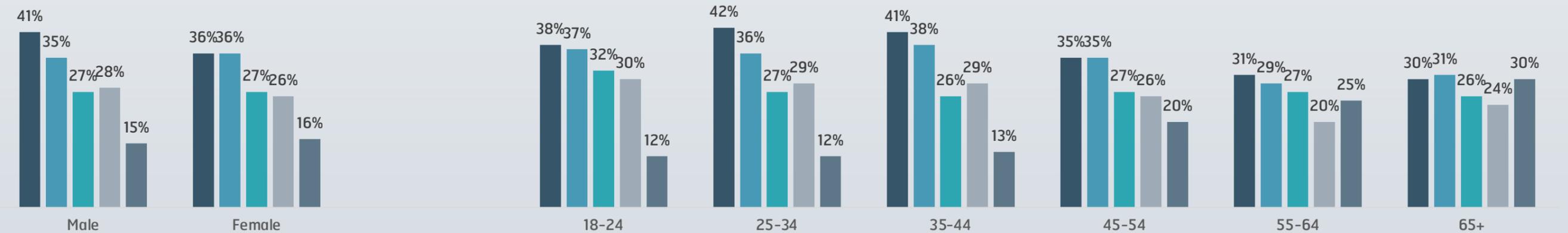
Q19. What describes your attitude towards the environmental impact of flying?

Q19. What describes your attitude towards the environmental impact of flying?

All respondents

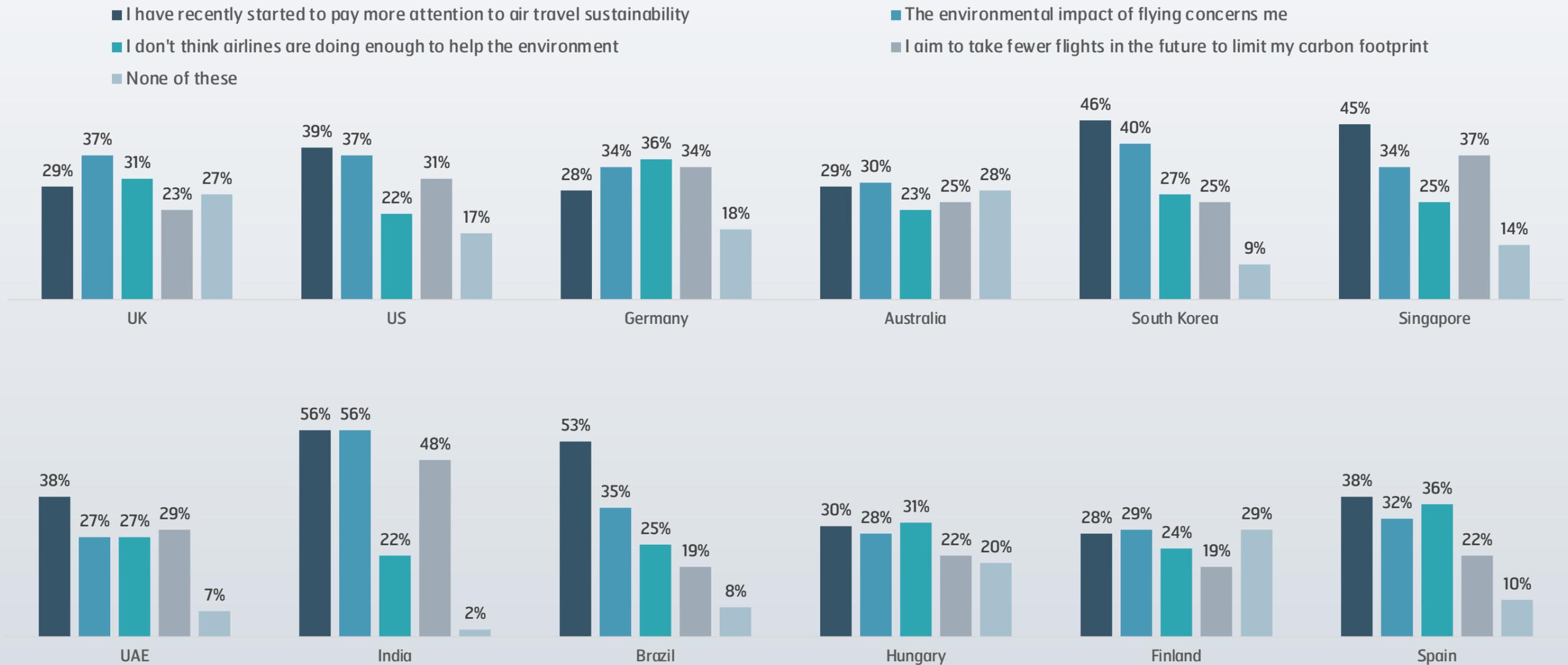


- I have recently started to pay more attention to air travel sustainability
- The environmental impact of flying concerns me
- I don't think airlines are doing enough to help the environment
- I aim to take fewer flights in the future to limit my carbon footprint
- None of these



The environmental impact of flying seems to be a greater concern for those aged 18-44.

Q19. What describes your attitude towards the environmental impact of flying?



Over a quarter of those surveyed believe airlines are not doing enough to help the environment.

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