

2021

# PASSENGER CONFIDENCE TRACKER

September 2021

BUILT TO FLY

  
**inmarsat**  
AVIATION

# FOREWORD

The goal of forecasting is not to predict the future. Rather, it's a way of arming people with enough knowledge to help them take meaningful action in the present.

Subsequently, there is clear value in attempting to gauge how the aviation industry is handling the post-COVID road to recovery. And, fundamentally, what insights may aid that journey – particularly when it comes to encouraging passengers to return to the skies.

The aviation industry is renowned for its resilience and innovation. Such qualities have seen it take significant steps towards recovery, although it is still a long way off reaching anything like pre-2019 numbers. To put it into context, the estimated impact on airlines for 2020 was about a \$370 billion revenue loss versus 2019. And that's just the airlines, before you even factor in supply chains and other subsectors.

Unsurprisingly, estimates as to when the industry might return to pre-pandemic levels vary. Those taking a bullishly optimistic view suggest next year, while a possibly more realistic outlook for the return of passenger numbers and revenue is forecast to be 2024.

Whatever the outcome, the inevitable factors that will shape this future are twofold, as they were ever thus: supply and demand. While supply side factors will be shaped by a range of criteria and influences, understanding how passengers are feeling now, compared to this time last year, can be a crucial weapon for all in the airline industry in the fight for recovery.

This is the premise behind the return of Inmarsat's Passenger Confidence Tracker. First launched towards the end of last year to provide an understanding of how potential flyers were feeling at the height of the disruption, this year's edition aims to showcase how perceptions have shifted in the intervening months.

With over 10,000 passengers from across the globe offering their thoughts on flying today – compared to how they felt during the middle of the pandemic – this survey offers an invaluable picture of changing passenger mindsets.

One of the main take outs from this year's survey is that the number of people who have taken a flight since the pandemic started has grown from 34% to 58% – but how confident and secure have they felt during these flights?

Other key findings include the sustained importance of connectivity – especially connected technologies – in rebuilding passenger confidence, and, as a by-product, enhancing airline reputation.

As such, we hope that the findings of the 2021 Inmarsat Passenger Confidence Tracker will not only help airlines understand their passengers better, but also equip them with enough insight to encourage fliers to return – safely – to the skies. And in doing so, enable the aviation industry to take the next important steps to recovery.



**Philip Balaam**  
President  
Inmarsat Aviation

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# USING INSIGHTS TO CHART PASSENGER CONFIDENCE

Change is constant. And while we might not always be able to anticipate these changes – as the last 18 months or so has dramatically demonstrated – how we react to them is crucial. As such, it's vital that we accrue the necessary knowledge to help us succeed in an era of increasing unpredictability.

That's why the results of Inmarsat's latest Passenger Confidence Tracker are so important. As the world, to varying degrees, continues to emerge from the worst effects of COVID-19, the insights contained in this updated report indicate what recovery across the aviation sector may look like in the short-to-medium term.

Last year's survey was an attempt to understand passenger attitudes to travel, their levels of confidence at different stages of a journey and how technology can assist in restoring passenger confidence.

This year's edition builds on those insights by providing updated data, reflecting current views as of summer 2021, as well as building in new insights on evolving technologies and regulations, such as digital health passports, vaccine passports and government interventions.

Armed with this knowledge, airlines can get on the front foot, therefore encouraging the recovery of the industry.

## Confidence is growing, but in different ways

Foremost, this year's survey demonstrates that talk of a recovery is very real – and increasing. However, it's also clear that confidence is growing in different ways across the globe.

Travel anxiety prompted by fear of catching the virus continues to be the highest travel concern among APAC passengers at 59% against 44% for those from EMEA. For that particular group, inconvenient regulations associated with travel such as quarantining comes to the fore as the largest travel worry at 57%, whereas it's less than half for those in the Americas.

There is a link between higher approval levels of government responses to air travel during the crisis, such as in Asia-Pacific (APAC) and a greater respect for the danger of the virus in these regions. Where as in Europe, Middle East and Africa (EMEA) and Americas, where approval of government approaches towards air travel are lower, there is a greater focus on avoiding inconveniences when it comes to travel.

In order to unpick why this may be the case, and what those in the industry need to consider, airlines have to continue with a passenger-centric approach to guide their next steps. A global, uniform approach towards recovery strategies won't work – understanding regional passenger concerns and acting accordingly will.

## Technology remains crucial in boosting passenger confidence

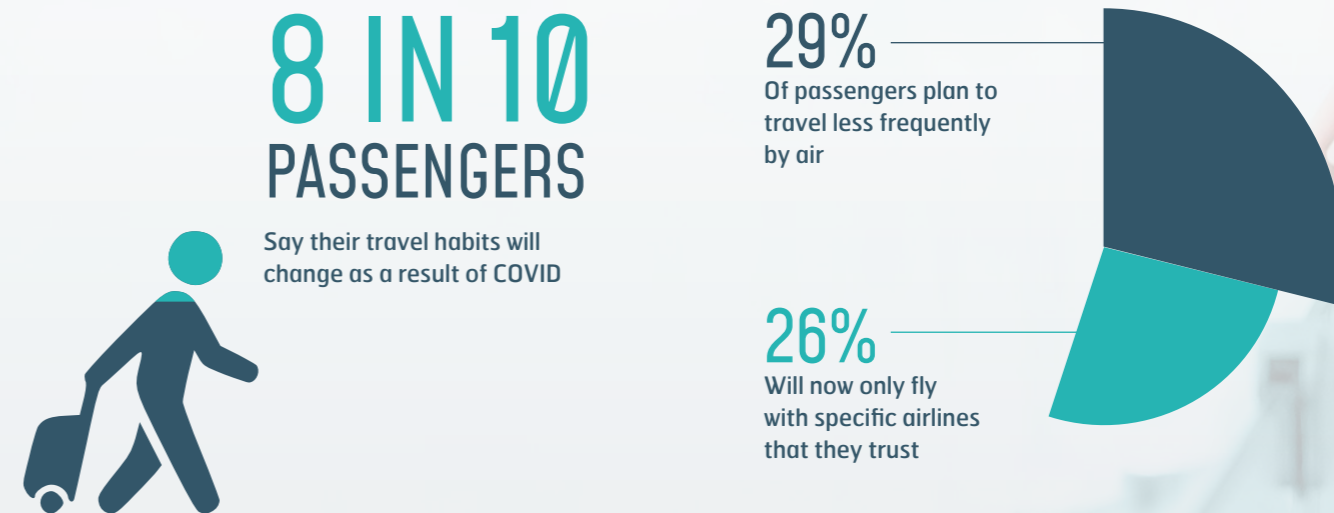
An interesting evolution in this year's survey reveals that those who have taken a flight since the pandemic started are 20% more confident when it comes to air travel health and safety precautions than those who haven't. This indicates that the measures taken by airports and airlines have made an impact in improving passenger confidence.

A key part of these initiatives has been the growing influence of technology in not only minimising contact, but also in improving the distribution of information before, during and after a flight. Around 70-80% of respondents said that the inflight availability of contactless payments, destination status alerts, pre-order contactless catering and video medical support would improve their confidence when on board.

But it's not just about convenience and safety. As the digital transformation of airlines continues at pace, the role of technology in supporting onboard leisure activities is also on the rise. When it comes to factors that have become more important to the enjoyment of flights, inflight entertainment and inflight Wi-Fi have both grown over the past year to 30% and 41% respectively.

And finally, with 84% of those surveyed feeling that vaccine passports are a good idea, the mass adoption of digital health passports as part of the flying experience feels like it's just around the corner.

As the industry continues to chart a path towards recovery, we hope that our Passenger Confidence Tracker will act as a shining light as you plan your path to a sustainable and profitable future.



# METHODOLOGY

Fieldwork during summer 2021.

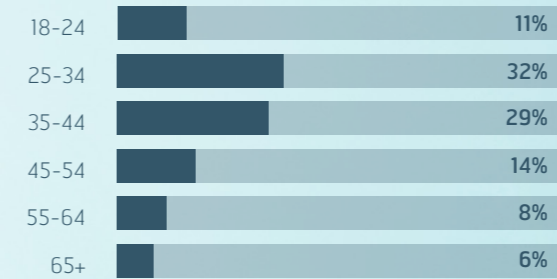
All respondents have taken a flight, for either leisure or business purposes in the past 24 months.



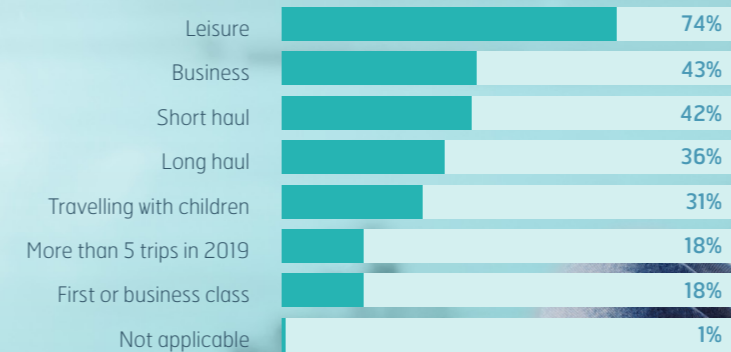
- Male 53% (5,406)
- Female 46% (4,689)
- Other 1% (15)

Australia	506
Brazil	510
Canada	511
China	1,011
Germany	506
Greece	508
India	1,010
Indonesia	503
Japan	502
Mexico	506
Singapore	504
South Korea	508
Spain	504
UAE	506
UK	1,009
US	1,006
<b>TOTAL</b>	<b>10,110</b>

## Age distribution



## In 2019, pre-pandemic, which of these trips did you take?



Fieldwork carried out by Yonder (formerly Populus)

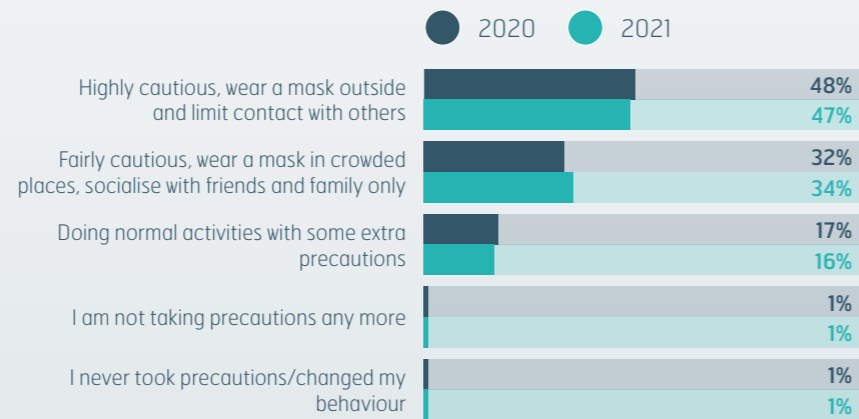
**.YONDER**



# EVOLVING PASSENGER ATTITUDES AND BEHAVIOURS

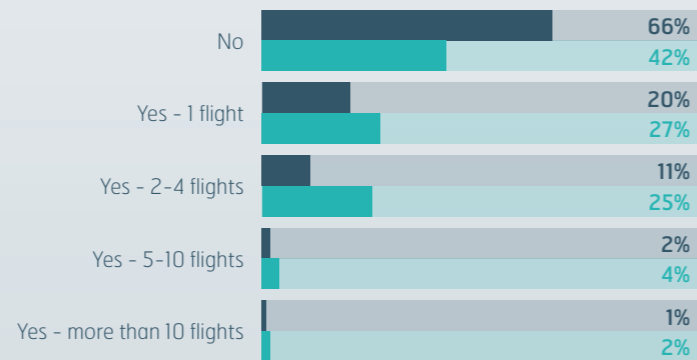
Overall levels of caution towards COVID-19 have not changed significantly, however countries like India (78%) and Brazil (70%) are far more cautious than the UK (25%) and Australia (33%).

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



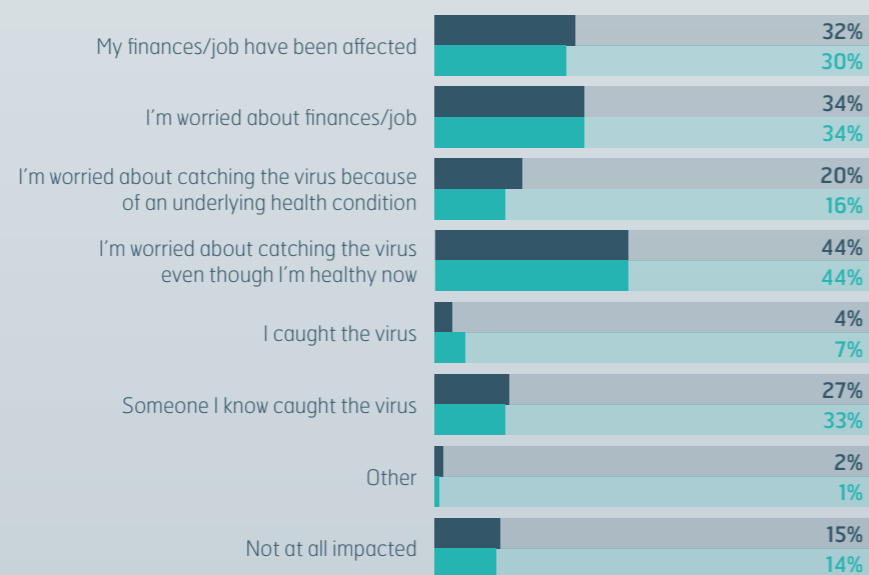
58% of respondents have taken a flight since the start of the pandemic, up from just 1 in 3 in 2020. Respondents over the age of 45, and those from EMEA, are least likely to have taken a flight in this time.

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



Health concerns still dominate when it comes to COVID-19's impact, followed by financial implications, with the APAC region reporting the highest proportion of being worried of catching the virus (52%).

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

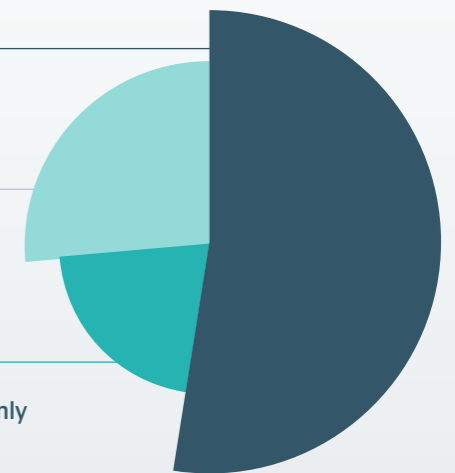


Domestic flights (53%) have dominated flying during the pandemic, but Singapore, Germany, UAE and the UK have been exceptions and favoured international travel.

53% Domestic destinations only

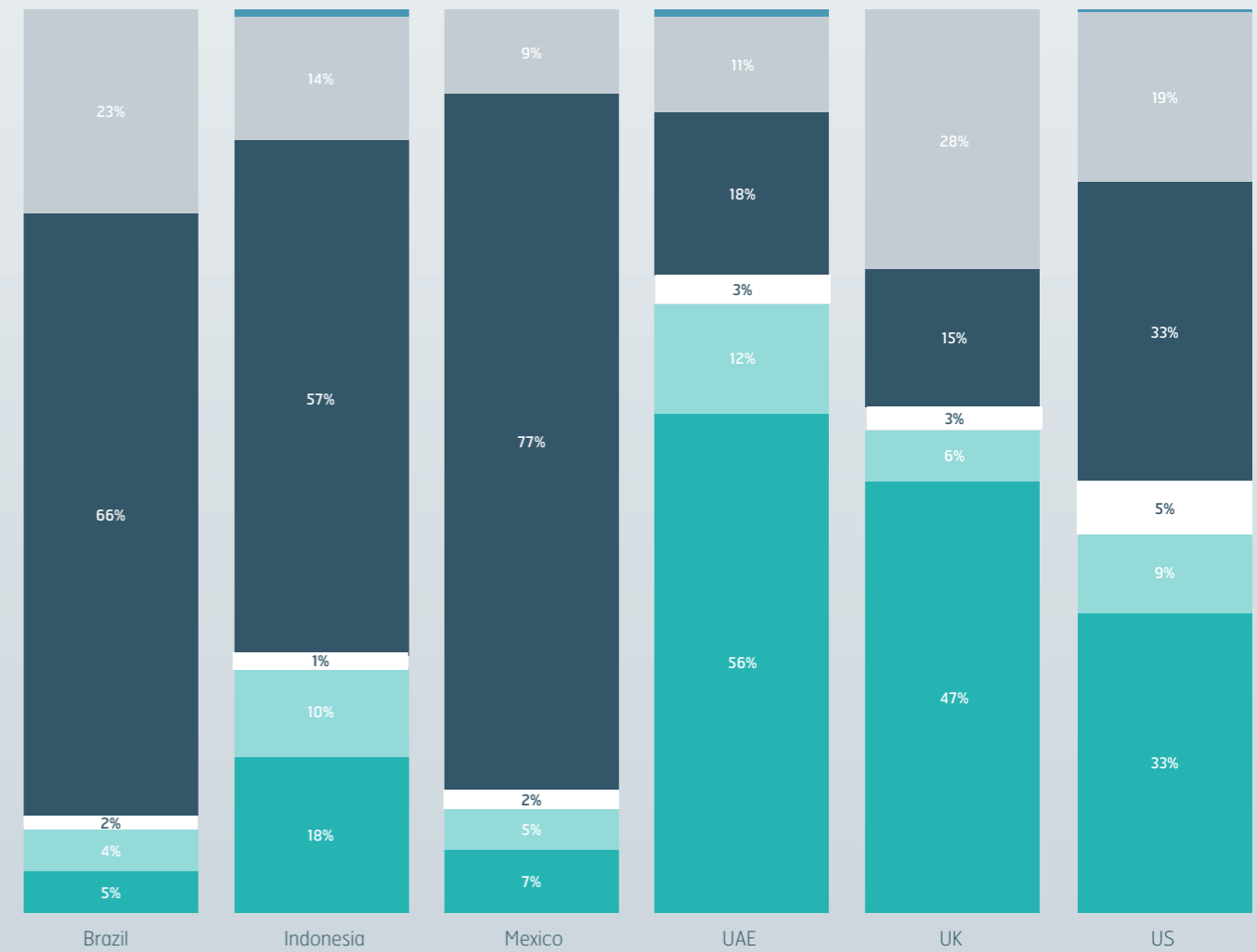
26% Mix of domestic and international destinations

21% International destinations only



Those with higher claimed vaccinations (UK, US, UAE) correlate to less caution towards COVID-19.

Q: Which of the following best describes your current situation with regards to the COVID-19 vaccination?



- I am not yet vaccinated but plan to take it if/when offered
- I am fully vaccinated
- I have received the first of two doses of my vaccination
- I am not yet vaccinated and am undecided about taking it when offered
- I am not yet vaccinated and do not plan to take the vaccination
- Prefer not to say

# CONFIDENCE IN GENERAL HAS GROWN SINCE 2020, AND AIR TRAVEL IS SLOWLY BENEFITING

While 8 in 10 passengers still believe that their travel habits are likely to change post-COVID-19, the good news is that we've seen a 6% drop in the number who expect to travel less frequently since 2020.

The big shift in travel habits is a move towards flying only with trusted airlines – most pronounced in the Americas market with an 8% uplift. It's interesting to note that, excluding private cars, around half of all respondents have the same confidence in air travel when compared to other forms of public transport.

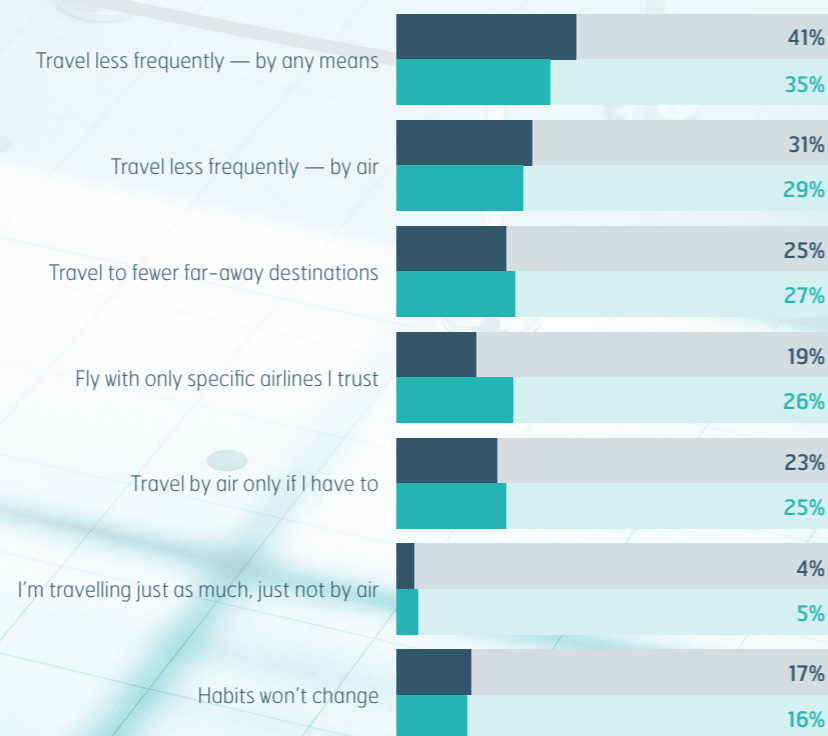
By comparison, 1 in 3 felt less confident on buses than a flight, a sentiment shared by 41% for metro/underground trains users.

As the world has opened up, restaurants/bars, conferences and schools have experienced marginal upticks in being seen as safer in 2021 – by an average of 5%.

In keeping with increasing confidence to venture into the world in general, 6% fewer passengers said they would travel less frequently in 2021. However, the big gainer is the decision to travel only with trusted airlines.

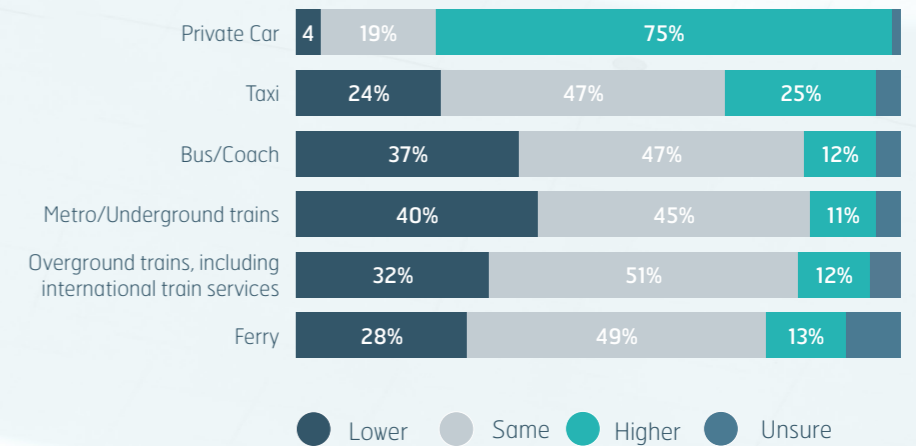
Q: How are your travel habits likely to change, if at all, from now on post-COVID-19?

● 2020 ● 2021



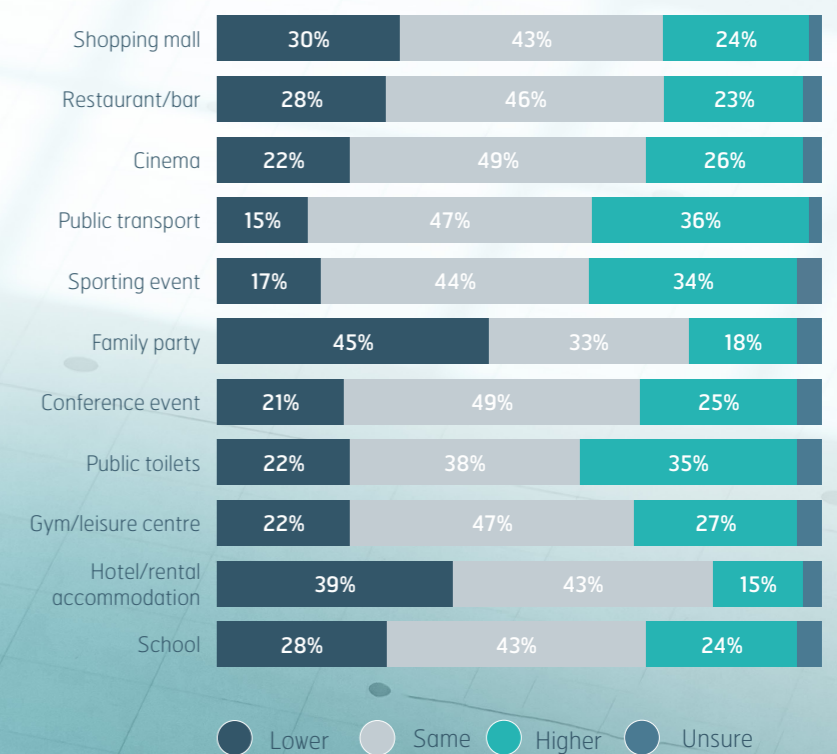
Excluding private cars, around half of all respondents had the same confidence with regards to COVID-19 when comparing catching a flight to other forms of transport.

Q: In comparison to catching a flight, how confident would you feel with regards to COVID-19 and being able to travel safely on the following forms of transport?



Only family parties and hotel/rental accommodation are seen as significantly lower risk than flying, while public transport, toilets and sporting events are seen as higher risk by at least a third of people.

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



# DEMAND TO FLY HAS GROWN NOTABLY SINCE LAST AUTUMN

In last year's survey, less than half of respondents were confident to fly within 6 months, and only 2/3rds within a year.

Those figures have now climbed to 60% and 75% respectively – a clear signal that demand is returning. Japan and Indonesia show the greatest hesitance, with an average of 21% of people wanting to wait more than a year, while Greece proved the most willing to hop on a plane today with a high at 29% of respondents.



60% of respondents are confident to fly before the end of 2021, up from 47%, and 3/4 will be confident to take to the skies by summer 2022.

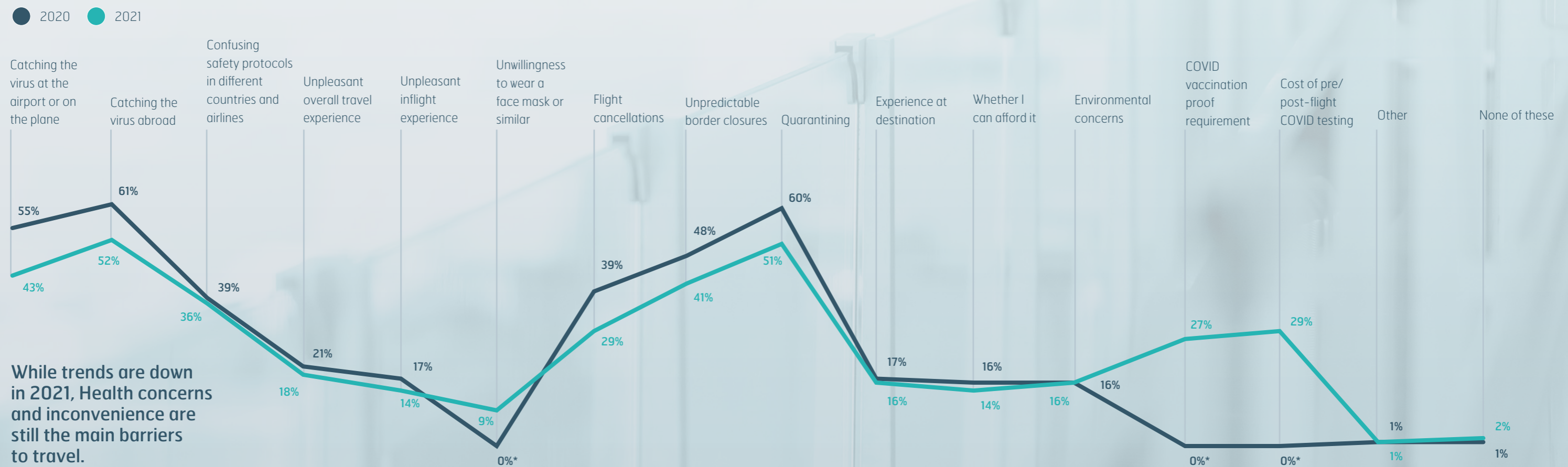
Q: When would you be confident to take your next flight?



# TRAVEL BARRIERS STILL CENTRE ON HEALTH AND INCONVENIENCE CONCERNS

Barriers to travel once again centre on worries over health, in terms of catching the virus, and travel inconveniences such as quarantining, unpredictable border closures and confusing safety protocols.

Concerns as to catching the virus are the primary worry in Americas (49%) and APAC (59%), while the inconvenience of quarantining leads in EMEA (57%).



While trends are down in 2021, Health concerns and inconvenience are still the main barriers to travel.

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

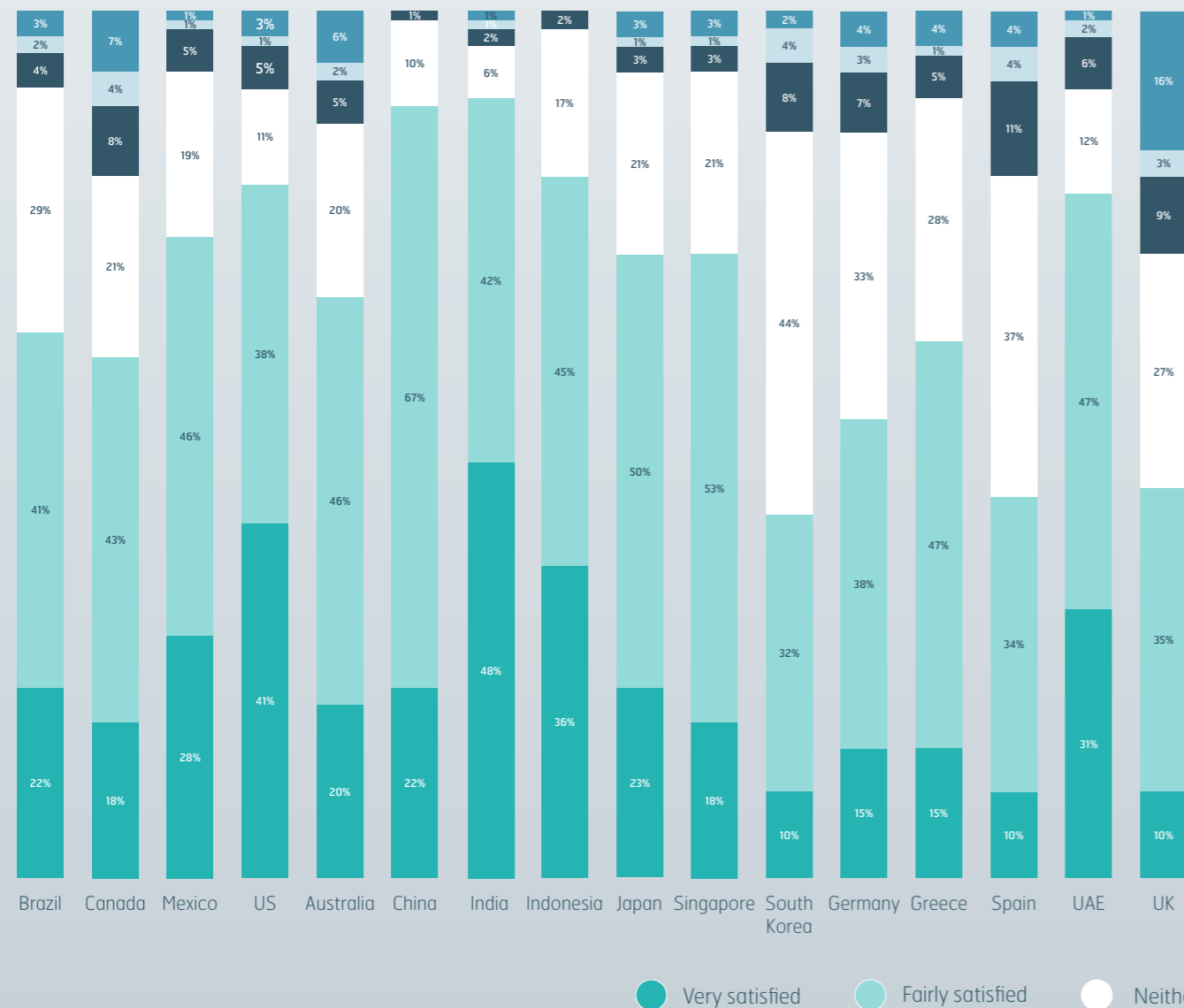
\* 0% denotes a new addition for 2021



# PERCEPTIONS OF AIRLINE AND GOVERNMENT RESPONSES ARE LINKED

When it comes to satisfaction with airlines' responses to the pandemic, India leads the way with levels at 90%, while South Korea props up perceptions at 42%.

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



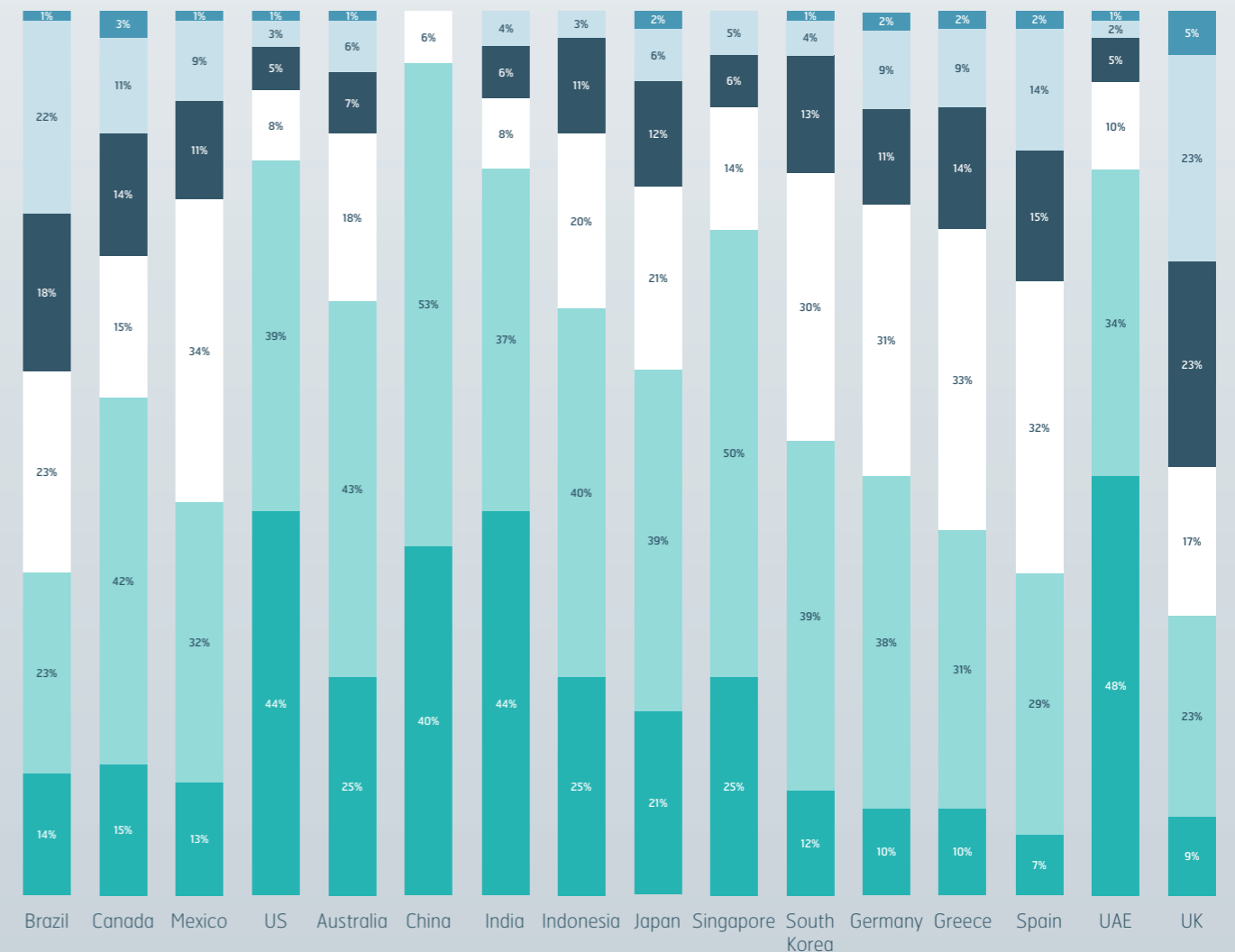
While the global level of satisfaction with airlines' responses to the pandemic has grown since October 2020, up to 72%, there are notable country-level differences at play.

For instance, India tops out at 90% for satisfaction, with China close behind at 89% and the US at 79%. This is in contrast to the UK (45%), Spain (44%) and South Korea (42%). These figures tend to have a correlation with how satisfied people feel towards governments' responses

across the regions; with almost 2 in 3 global respondents feeling Fairly or Very Satisfied with their government's actions towards air travel during the pandemic. In the minds of respondents, it seems it is difficult to separate the two.

There is a correlation between how respondents feel about their government's response, and that of airlines'.

Q: To what extent have you been satisfied or unsatisfied with your government's response towards air travel during the pandemic?



# TAKING A FLIGHT IMPROVES COVID-19 TRAVEL CONFIDENCE

In 2021 we have seen some tangible evidence that airlines' actions during the pandemic have had a positive impact on passenger confidence.

Last year, we saw that passengers felt somewhat more confident when there was an authority or airline figure present, for example going through security or communicating with cabin crew, compared to interacting with fellow passengers, and we've seen the same trend in this year's report. However, when comparing those who have taken a flight since the pandemic started with those who haven't, we find that the average confidence across all air travel touchpoints of those that have flown since

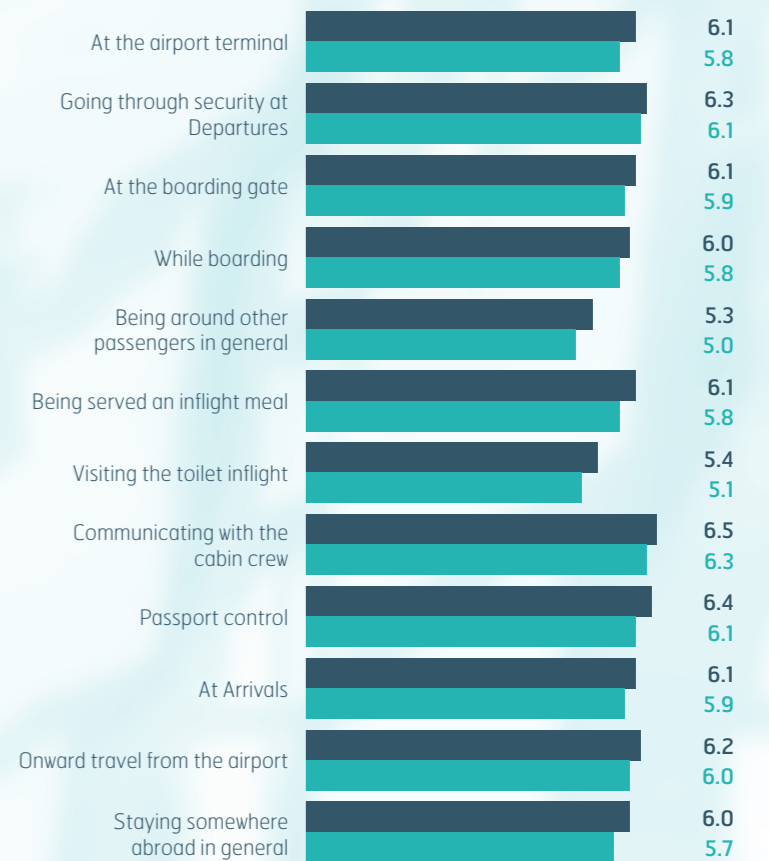
the pandemic started is 20% higher than those who are yet to fly. This would indicate that physically experiencing the protocols put in place by airlines over this time improves passenger confidence. We would hope to see that as more people return to air travel within COVID-19 protocols, the more passenger confidence in flying will continue to grow.



Confidence levels with regards to safety and health precautions have largely remained stable with passengers assuming greater confidence around airport and aircraft staff than fellow passengers.

Q: How confident would you feel with regards to safety and health precautions at the following points in an air journey?

● 2020 ● 2021



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

## 20%

Across all respondents, those that have flown since the start of the pandemic are 20% more confident when it comes to in safety and health precautions than those who have not.

Q: How confident would/did you feel with regards to safety and health precautions across all points in an air journey (average)?



Average confidence of those that have not flown since pandemic



Average confidence of those that have flown since pandemic

# DIGITAL TECHNOLOGIES CONTINUE TO DRIVE COVID CONFIDENCE

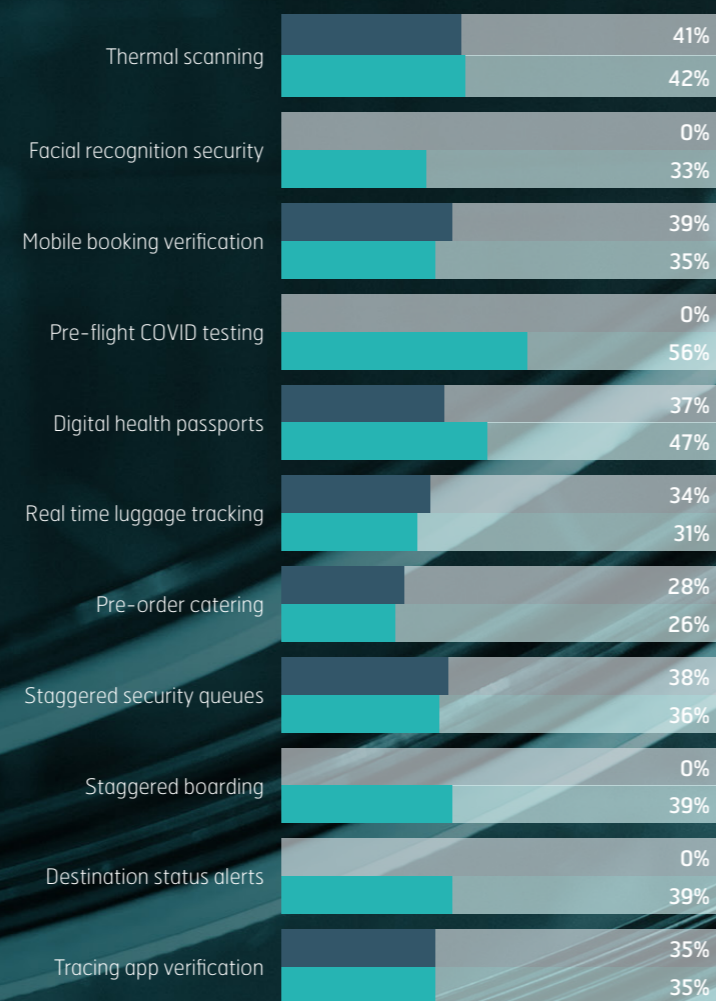
Our 2020 report found that digital technology improves passenger confidence in two ways; minimising contact (either with crew/staff or fellow passengers) and effectively sharing travel information and updates.

In 2021, we have seen this trend continue with digital health passports having increased in importance by 10%, while pre-COVID testing, a new variable, proved the most effective at improving confidence pre-flight.

**Digital health passports, linked to pre-COVID flight testing, are significantly effective at improving confidence pre-flight.**

Q: When considering taking an air journey in the near future, how much would the following measures improve your confidence within the airport and boarding?

● 2020 ● 2021



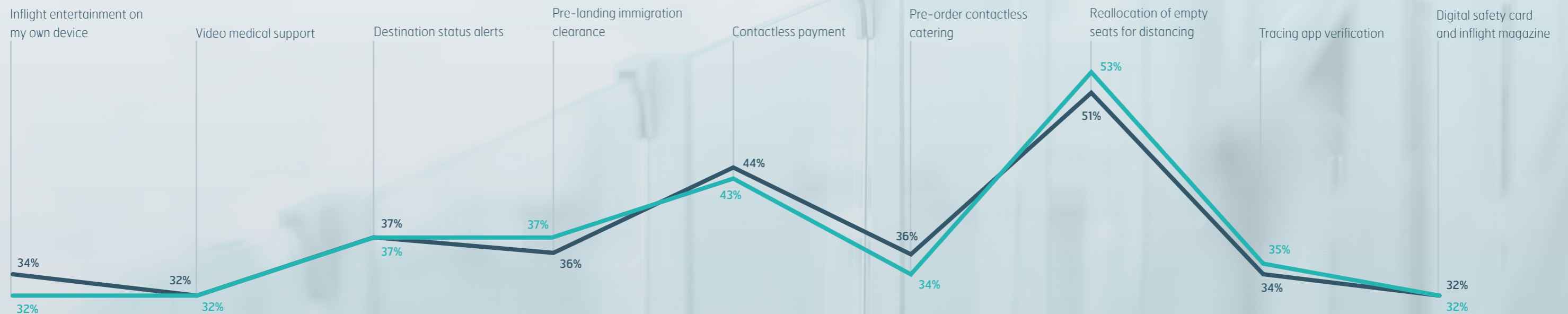
# DIGITAL TECHNOLOGIES CONTINUE TO DRIVE COVID CONFIDENCE

After the impact of the reallocation of empty seats, inflight digital technologies continue to contribute to improved confidence during the flight itself.

These include contactless payments, destination status alerts and pre-order contactless catering. Inflight entertainment on a passenger's own device and video medical support would have a significant impact for 1/3 of passengers.

It is worth noting that younger respondents (18-44) on average reported feeling 5-10% more confident towards these measures across all stages of the journey.

● 2020 ● 2021



Digital applications are effective at driving confidence inflight for a good proportion of respondents, through minimising contact and sharing important information updates.

Q: When considering taking an air journey in the near future, how much would the following measures improve your confidence during the flight itself?

# FLYING'S 'NEW NORMAL' IS FINDING FAVOUR

When asked about a range of factors that have become more important to a passenger's enjoyment of a flight, we see an increase across most factors in 2021 with the top 3 being service experience, extra leg room and inflight Wi-Fi.

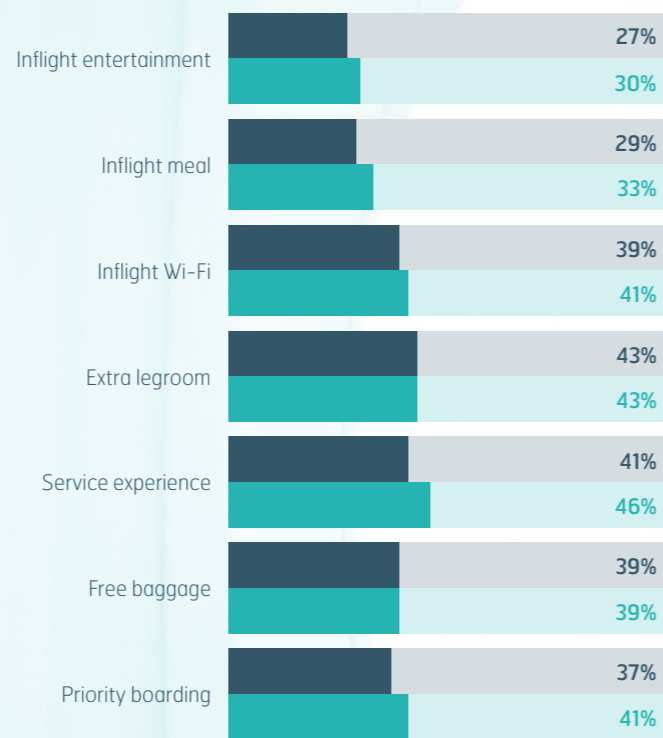
The preference for inflight Wi-Fi is driven mainly by the younger cohort (18-44), who also place increased importance on Inflight Entertainment (IFE). The Americas show a marked preference for inflight Wi-Fi, service experience and IFE when compared to EMEA in particular.

Selection criteria for choice of airline have also grown in importance in 2021, with the most notable change being an uptick in airline reputation. We saw fairly strong age differences, with younger (18-44) respondents placing far more importance on loyalty programmes, sustainability, airport locations and ticket prices – indicating a more discerning approach to selecting their carrier. This trend was also seen when comparing the Americas to EMEA on a regional view.

Service experience saw the biggest gain in 2021 with a 5% shift, while extra legroom and inflight Wi-Fi continue to be more important for enjoying a flight post COVID-19.

Q: Following the COVID-19 pandemic, would you say the following factors are MORE important, LESS important or about the SAME importance for the enjoyment of your flight?

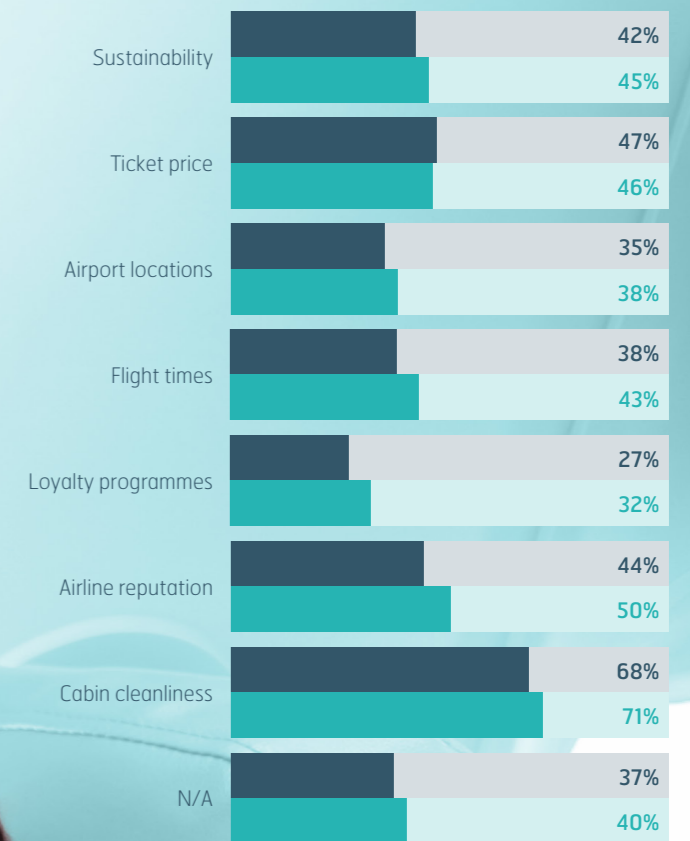
● More 2020 ● More 2021



Cabin cleanliness is still seen as being the factor most likely to be more important when choosing an airline post pandemic, while loyalty programmes and airline reputation have seen increases since 2020.

Q: 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?

● More 2020 ● More 2021



# PASSENGERS ARE CRAVING PREDICTABILITY

Across aviation media last year, we read that the air travel experience has fundamentally changed forever.

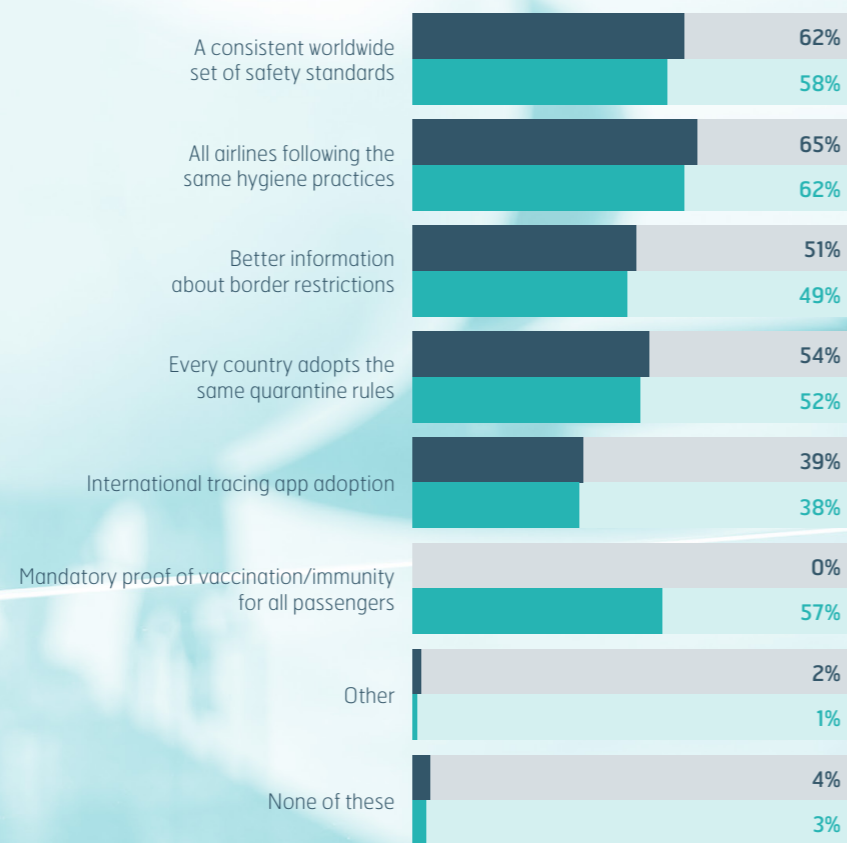
When we look to what passengers want to remain even after the pandemic is over, one thing becomes abundantly clear. No matter the changes facing the industry, from a passenger perspective, predictability is key. Whether this is across safety standards, hygiene practices, border restrictions or quarantine rules, it's the unpredictability and seemingly huge variation in rules and regulations that are hampering confidence towards travel.

Specifically, it's felt that the following would help to maintain confidence to travel beyond COVID-19: All airlines following the same hygiene practices (62%), a consistent worldwide set of safety standards (58%) and, in a new variable for 2021, mandatory proof of vaccination/immunity for all passengers (57%).

**Consistent world standards, airlines following the same hygiene practices and mandatory proof of vaccination/immunity are all factors that more than half of passengers would agree to post COVID-19.**

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

● 2020 ● 2021



# PASSENGERS SUPPORT THE IDEA OF VACCINE PASSPORTS

As noted previously in this report, the progress of vaccination attempts has varied across regions and countries.

While this is beyond the control of passengers, one topic they are unified behind is that implementing vaccine passports are a good idea. Half of all respondents felt strongly enough about this that they should be implemented now, while a further 34% agreed that they are a good idea, but should only be put into place once everyone's been offered a vaccine.

Australia stands out as being the most opposed to the idea, with just 51% thinking they are a good idea. Australians are primarily concerned with the use of personal data (43%), a sentiment shared by approximately a quarter of respondents in the UK, Germany and China.

**Half of respondents think COVID vaccine passports are a good idea and should be implemented now.**

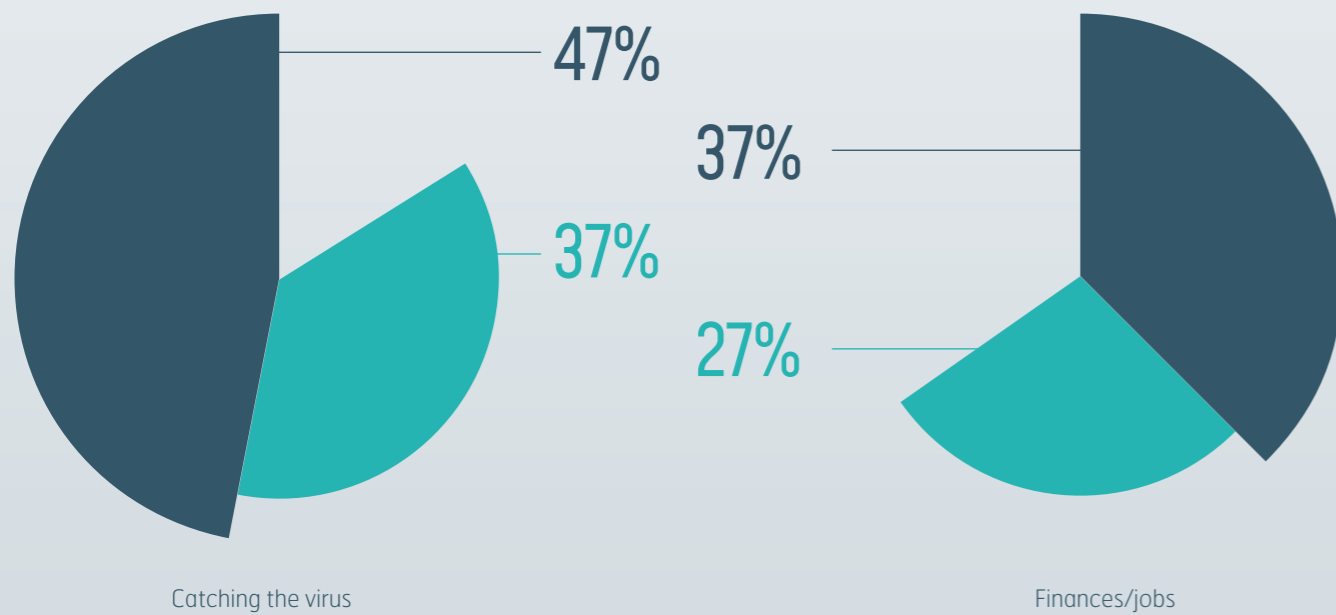
Q: Which of the following statements reflect your current attitude towards COVID vaccine passports?



# YOUNGER PASSENGERS ARE MORE CONFIDENT, AND MORE DISCERNING

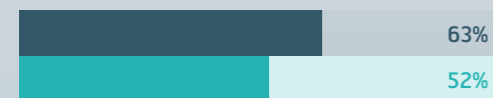
When it comes to impacts from the pandemic, younger respondents are more worried than older in two main areas:

● Younger (18-44) ● Older (45-65+)



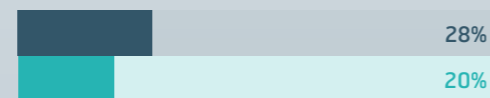
When it comes flying, older respondents are less confident to fly in the next 6 months

While older respondents seem less worried about catching the virus, over 10% fewer feel confident to fly in the next 6 months:



Younger respondents are more likely to fly with trusted airlines

When it comes to habits likely to change post COVID-19, 28% of younger respondents are more likely to fly only with airlines they trust vs just 20% for older respondents.



Older respondents are less confident towards air travel touchpoints

Older respondents on average feel

**5-10%**

LESS CONFIDENT

across all touchpoints of the air travel journey



Younger respondents are more discerning

On average

**15%**

MORE YOUNGER RESPONDENTS

feel that inflight Wi-Fi and entertainment will be more important to enjoying their flights after COVID-19 compared to older people.

On average

**13%**

MORE YOUNGER RESPONDENTS

feel that the following factors will become more important when choosing an airline after the pandemic: Sustainability, ticket prices, airport locations, flight times, loyalty programmes and airline reputation.





# APAC RESPONDENTS ARE THE MOST FLIGHT-CAUTIOUS BUT ALSO THE MOST CONFIDENT TOWARDS PRECAUTIONS, THE OPPOSITE OF EMEA

## Concerns about catching the virus are much higher in APAC

While it is the biggest impact of COVID-19 across all markets, APAC's concerns about catching the virus are 10% higher than the Americas and 18% higher than EMEA

The top travel habit most likely to change post COVID-19 varies across regions

AMERICAS

32%

Fly only with specific airlines I trust

APAC

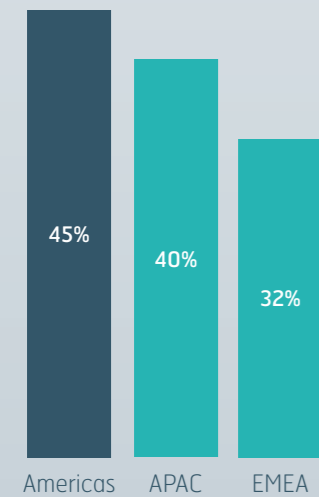
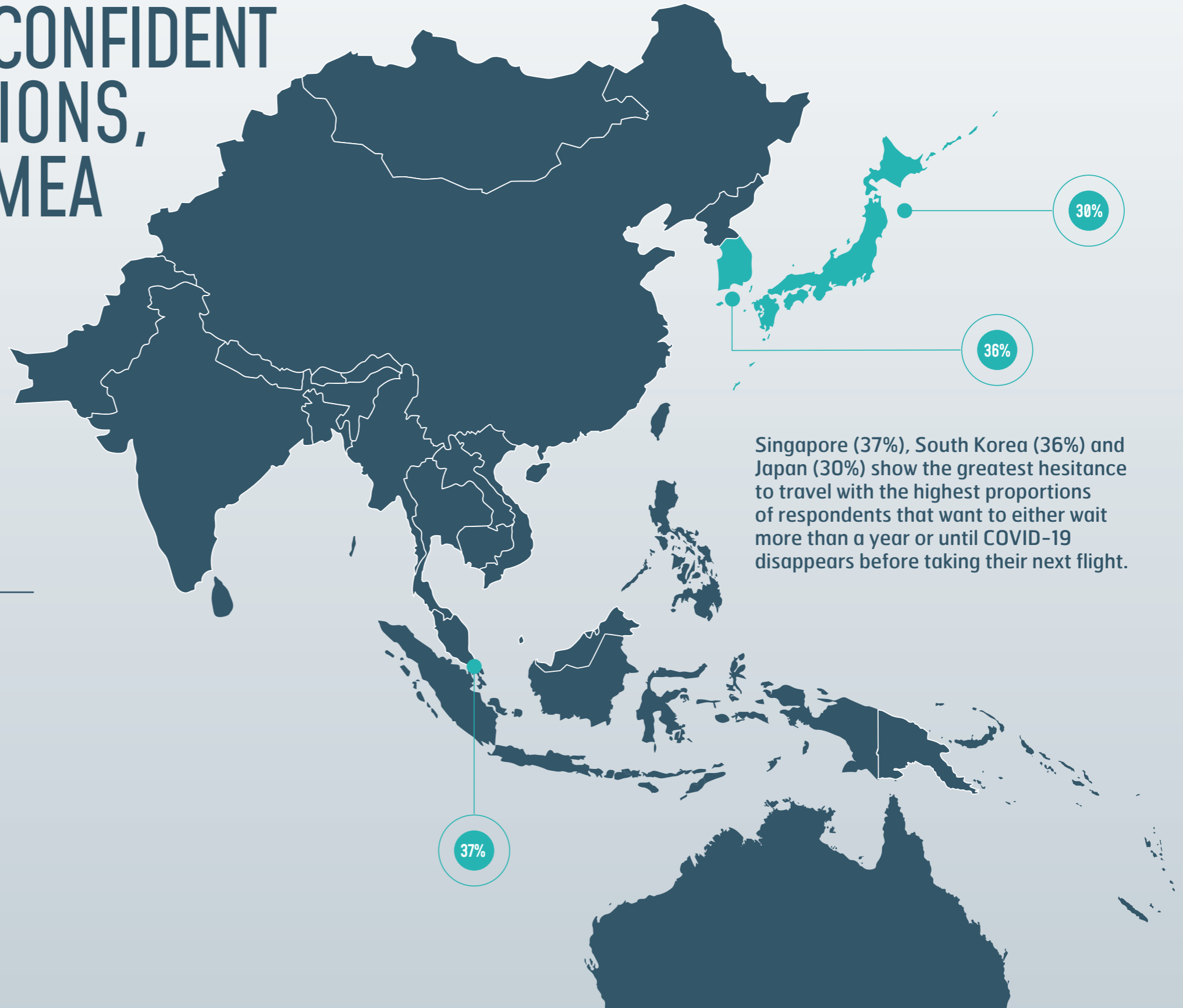
44%

Travel less frequently – by any means

EMEA

29%

Habits won't change



Respondents from the Americas are more likely to think a variety of factors\* will become more important post-COVID, particularly compared to EMEA

\*Average of factors respondents feel will become more important to the enjoyment of a flight post COVID-19

# APPENDIX

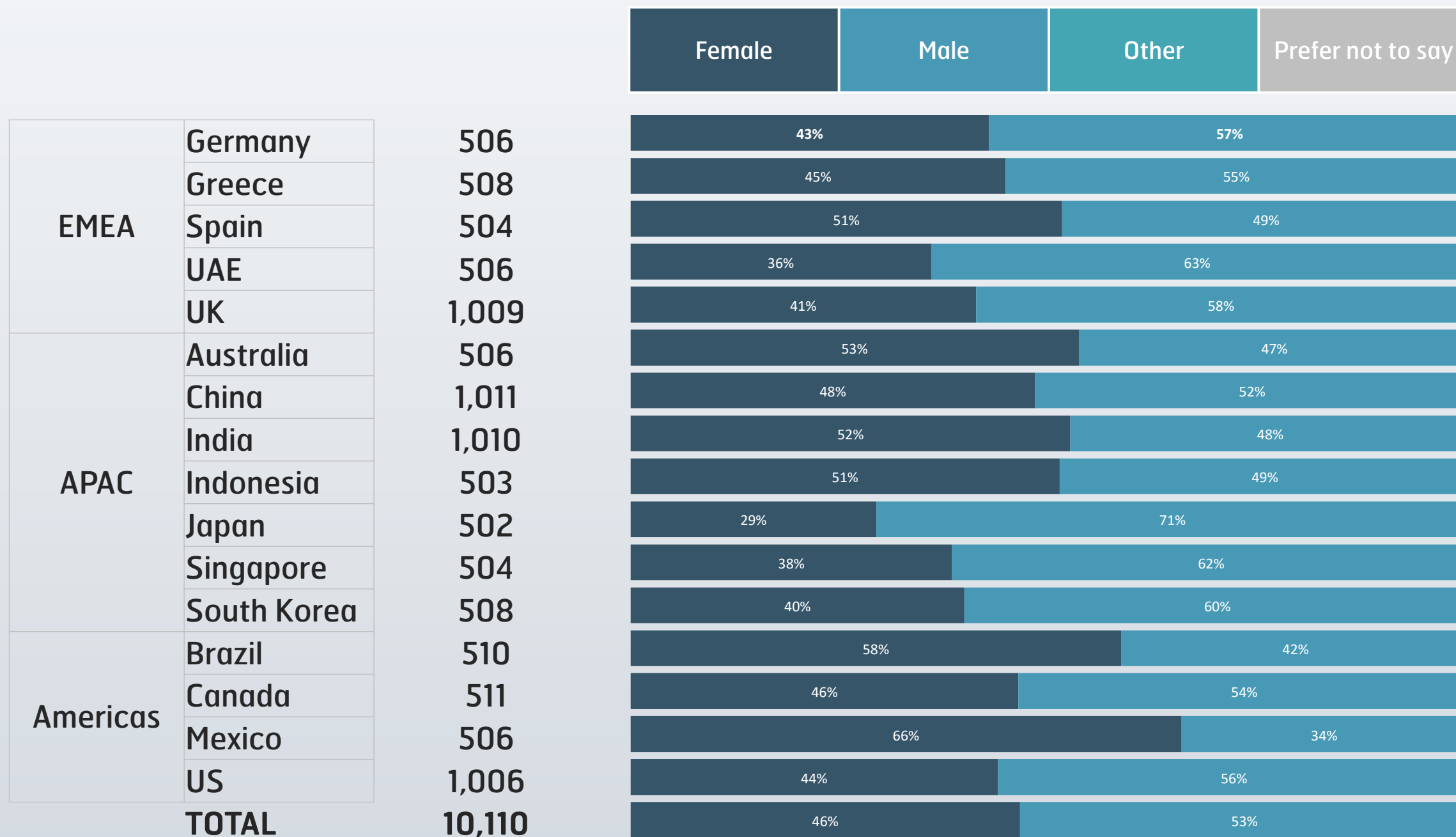
Country and age level responses

# RESPONDENT PROFILES

# Survey respondent composition by gender

## Respondents

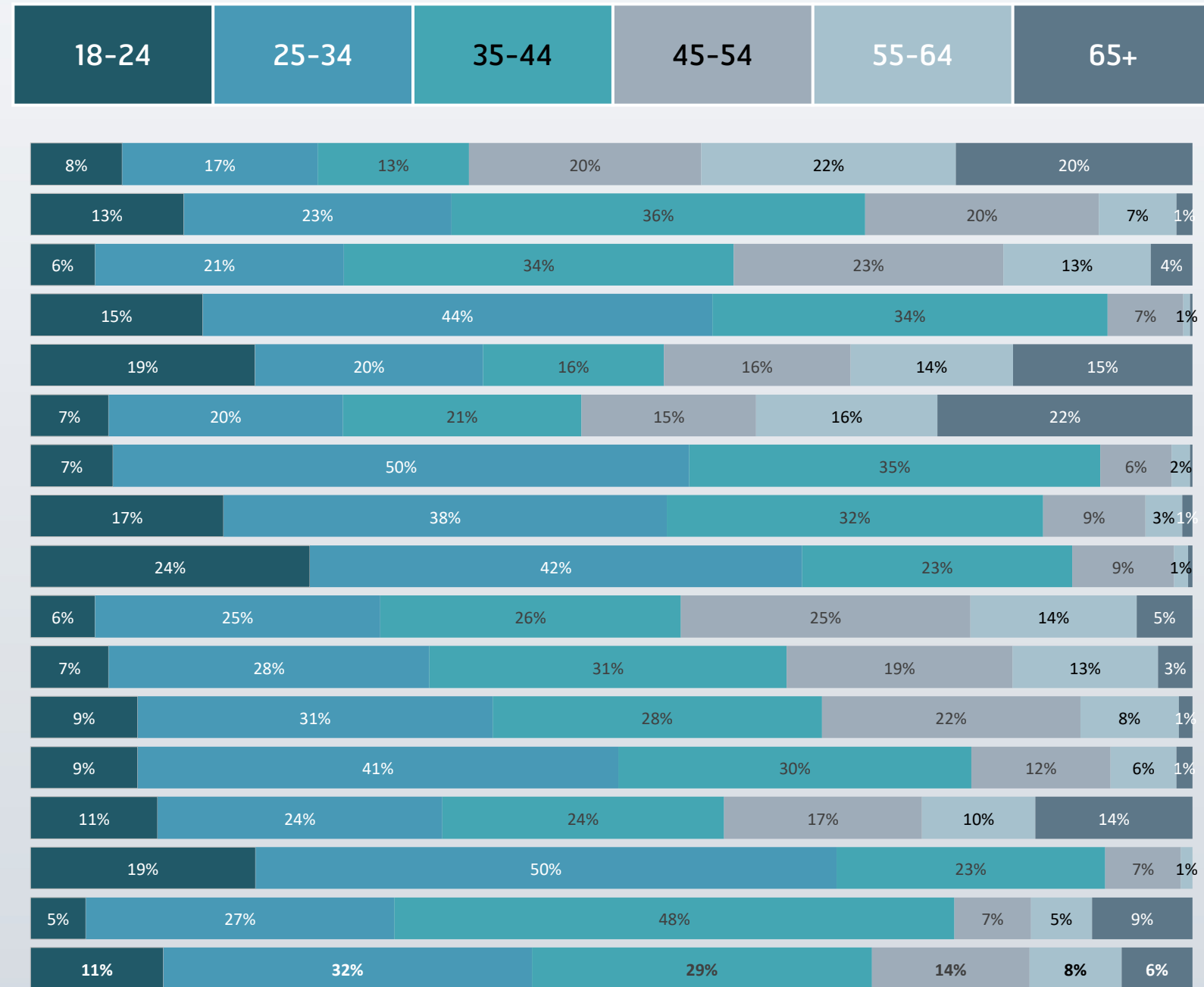
## Gender



# Survey respondent composition by age

## Respondents

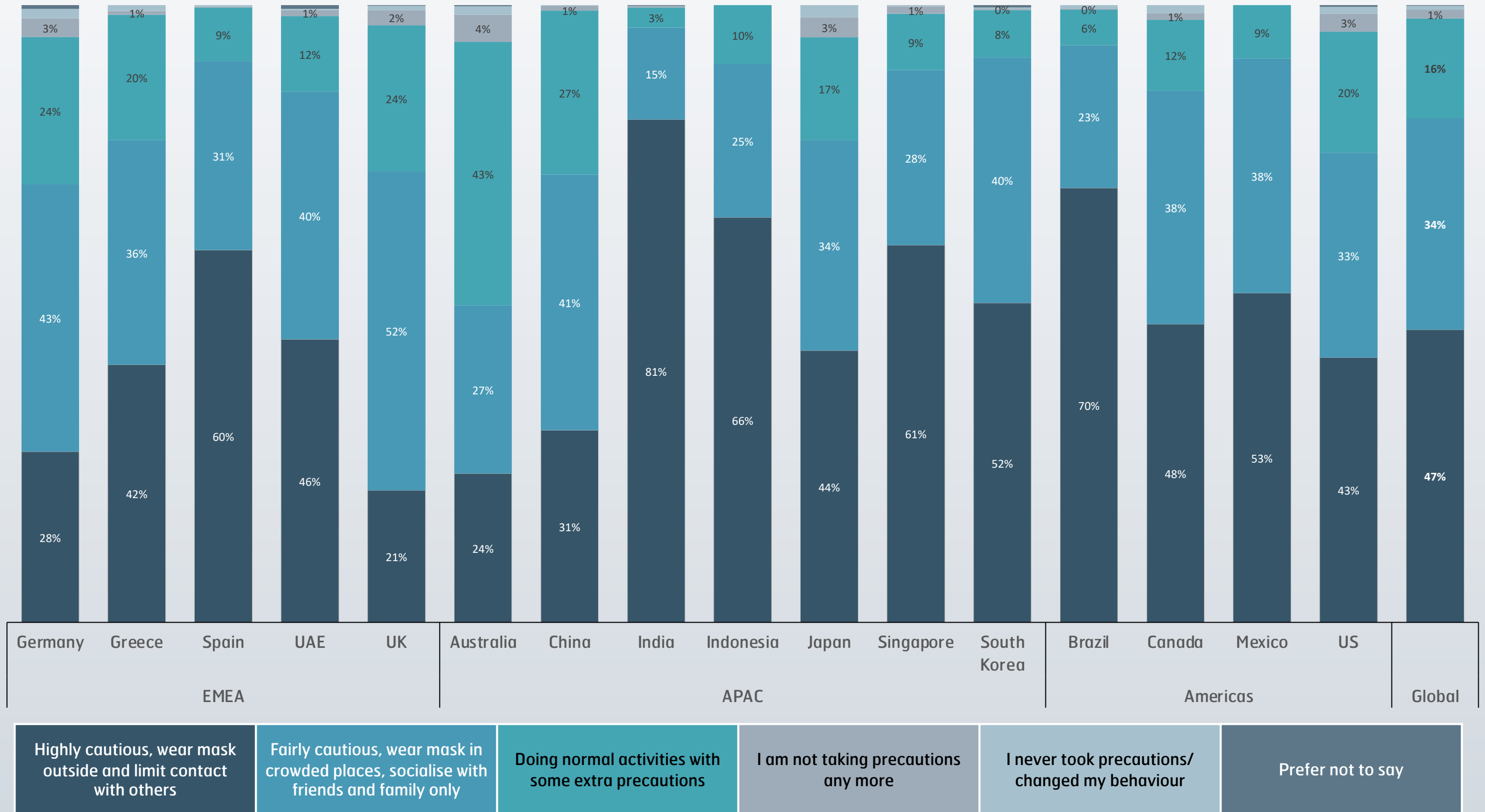
## Age distribution



EMEA	Germany	506
	Greece	508
	Spain	504
	UAE	506
	UK	1,009
APAC	Australia	506
	China	1,011
	India	1,010
	Indonesia	503
	Japan	502
	Singapore	504
	South Korea	508
Americas	Brazil	510
	Canada	511
	Mexico	506
	US	1,006
<b>TOTAL</b>		<b>10,110</b>

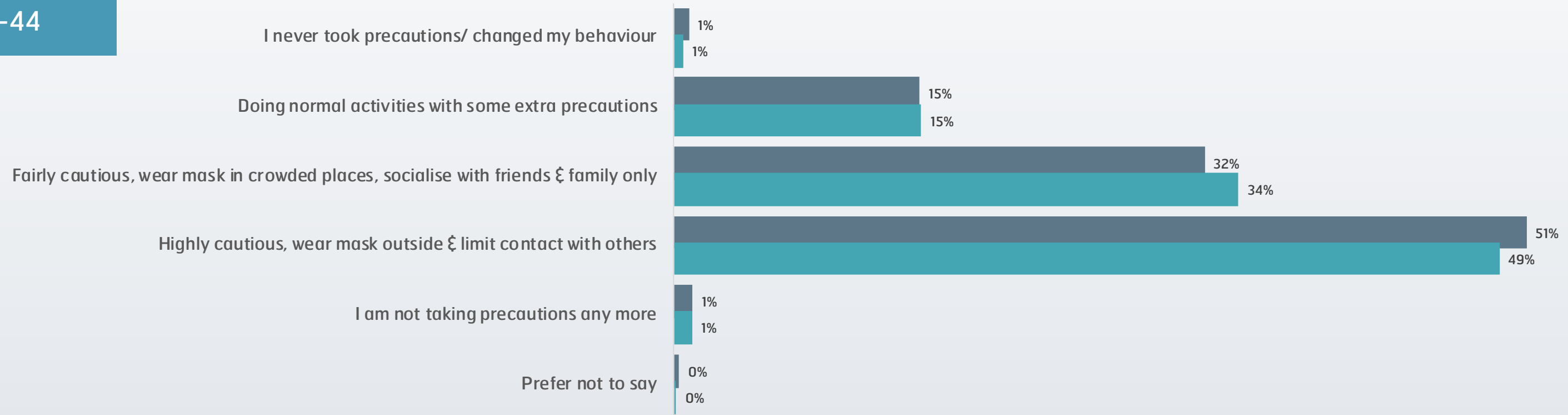
# QUESTION RESPONSES BY COUNTRY AND AGE

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

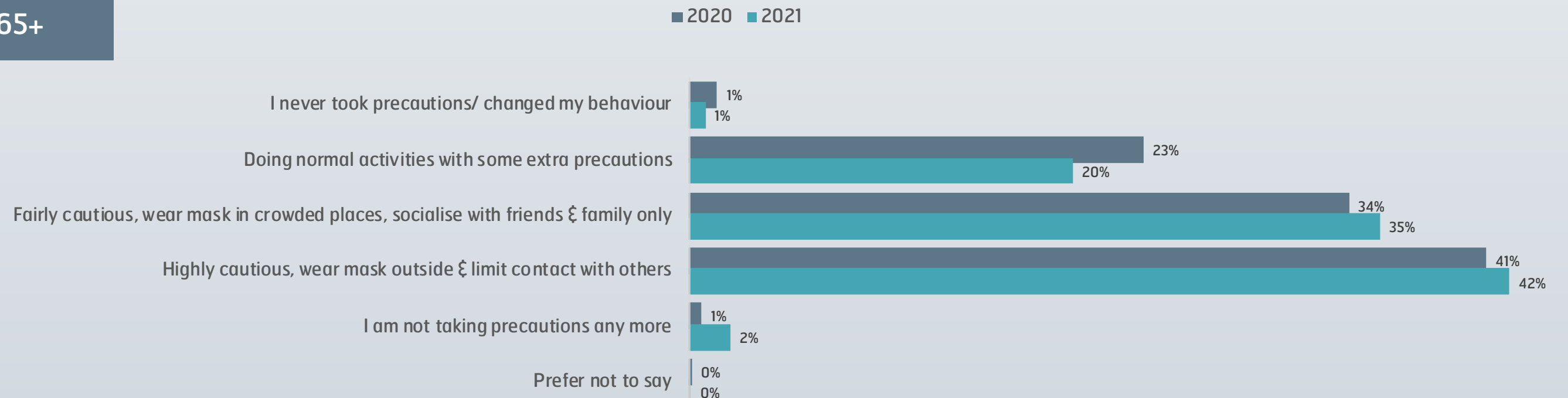


# Q1. Which of the following best describes your current behaviour to avoid COVID-19?

18-44

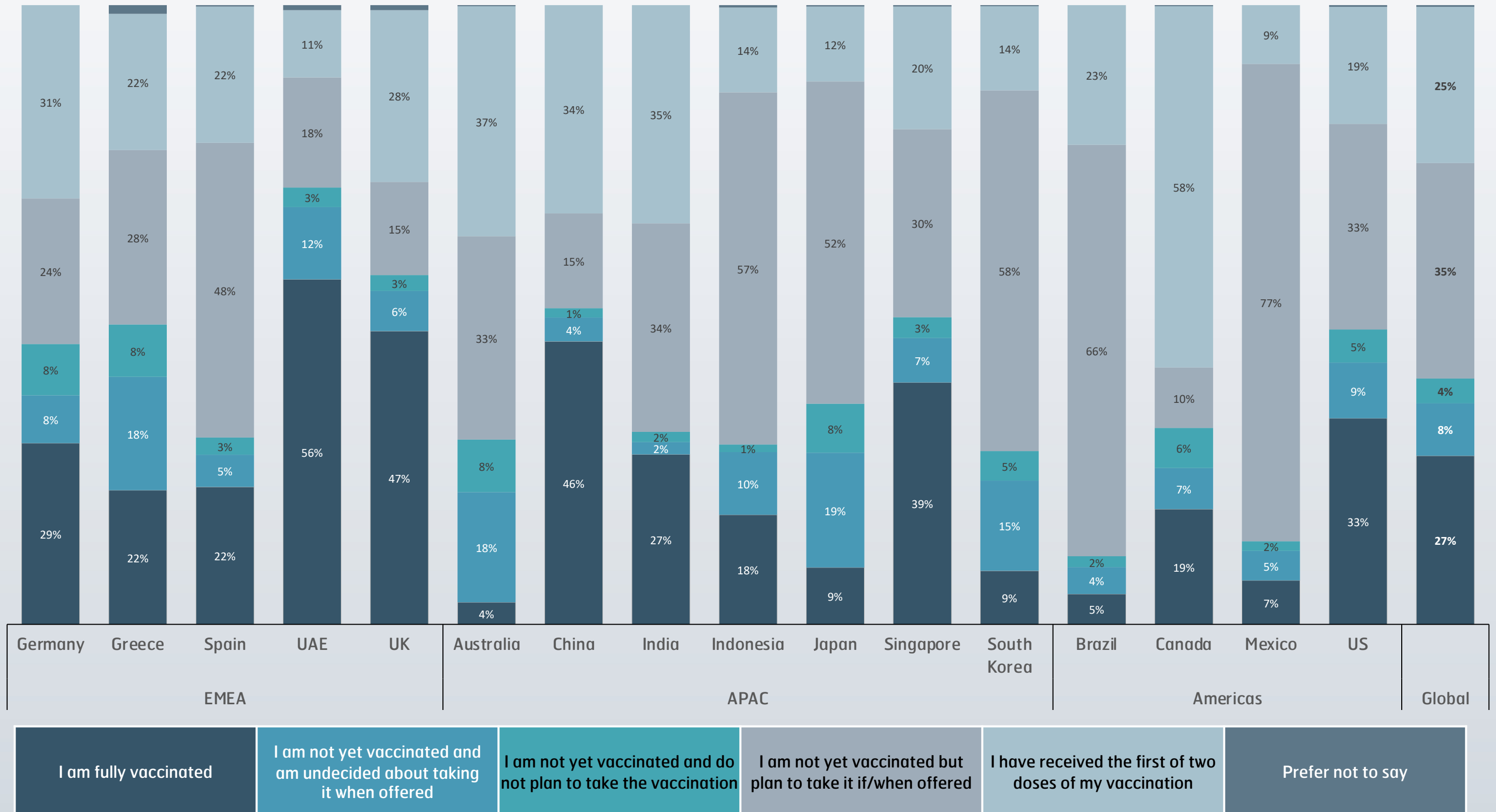


45-65+



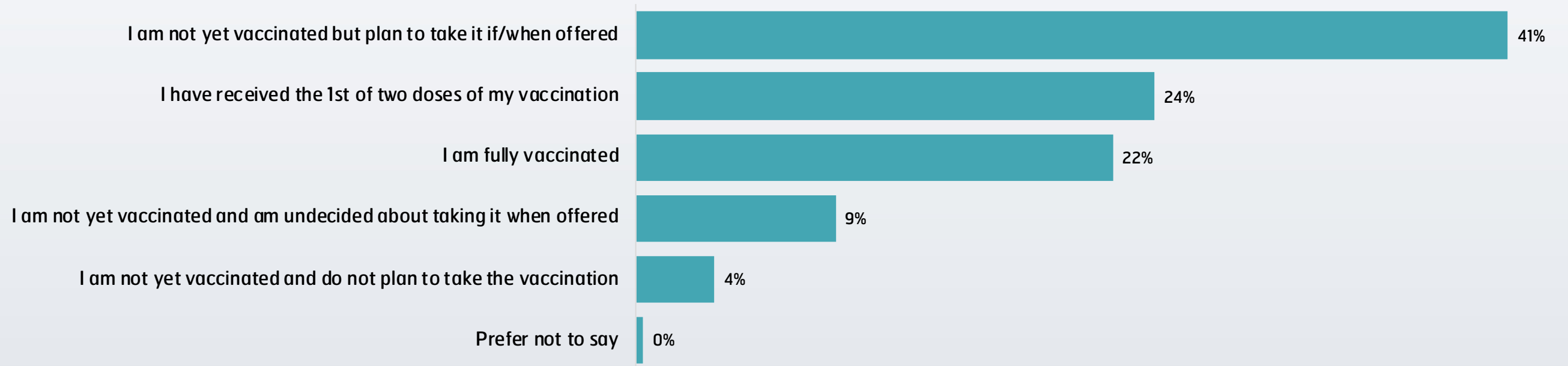


## Q2. Which of the following best describes your current situation regarding the COVID-19 vaccination?

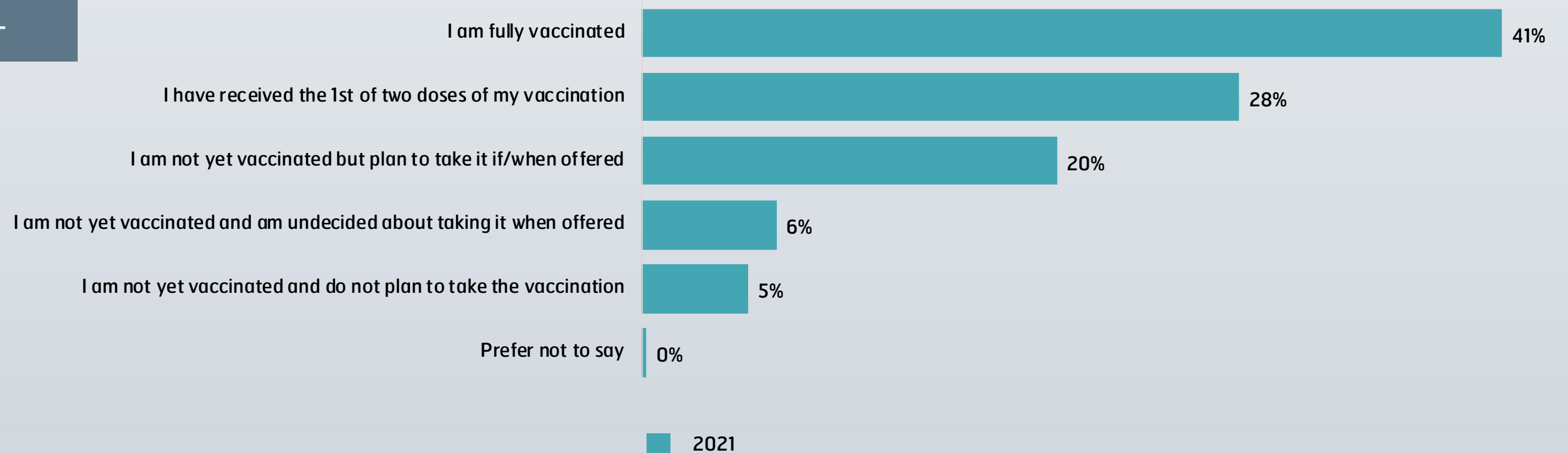


## Q2. Which of the following best describes your current situation regarding the COVID-19 vaccination?

18-44

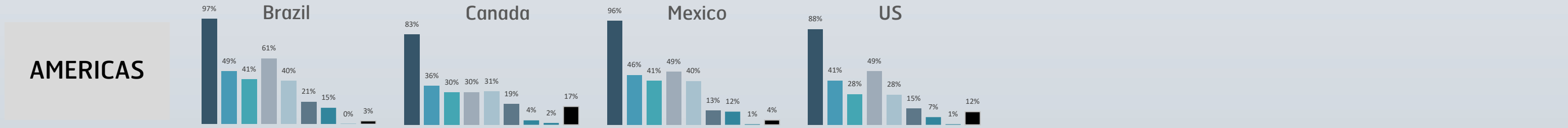
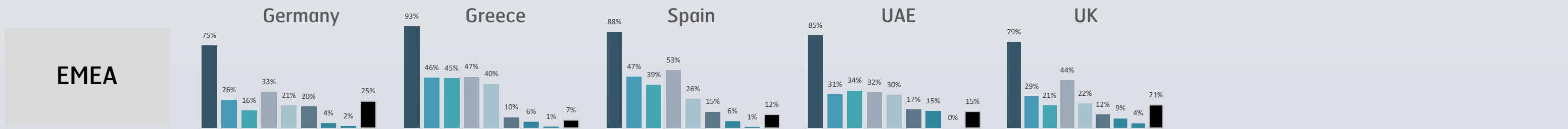
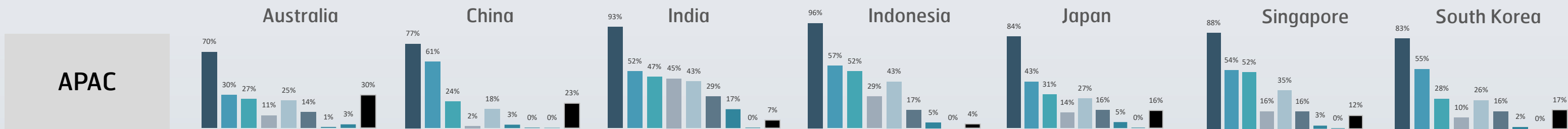
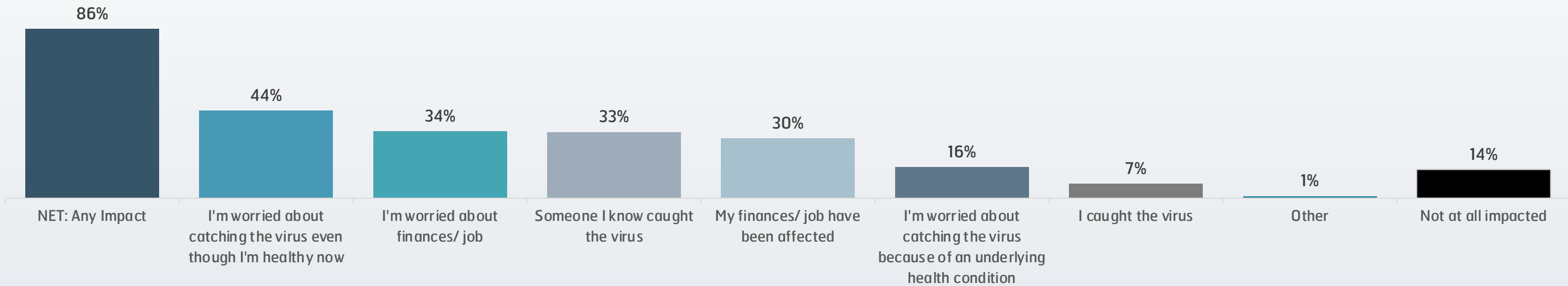


45-65+



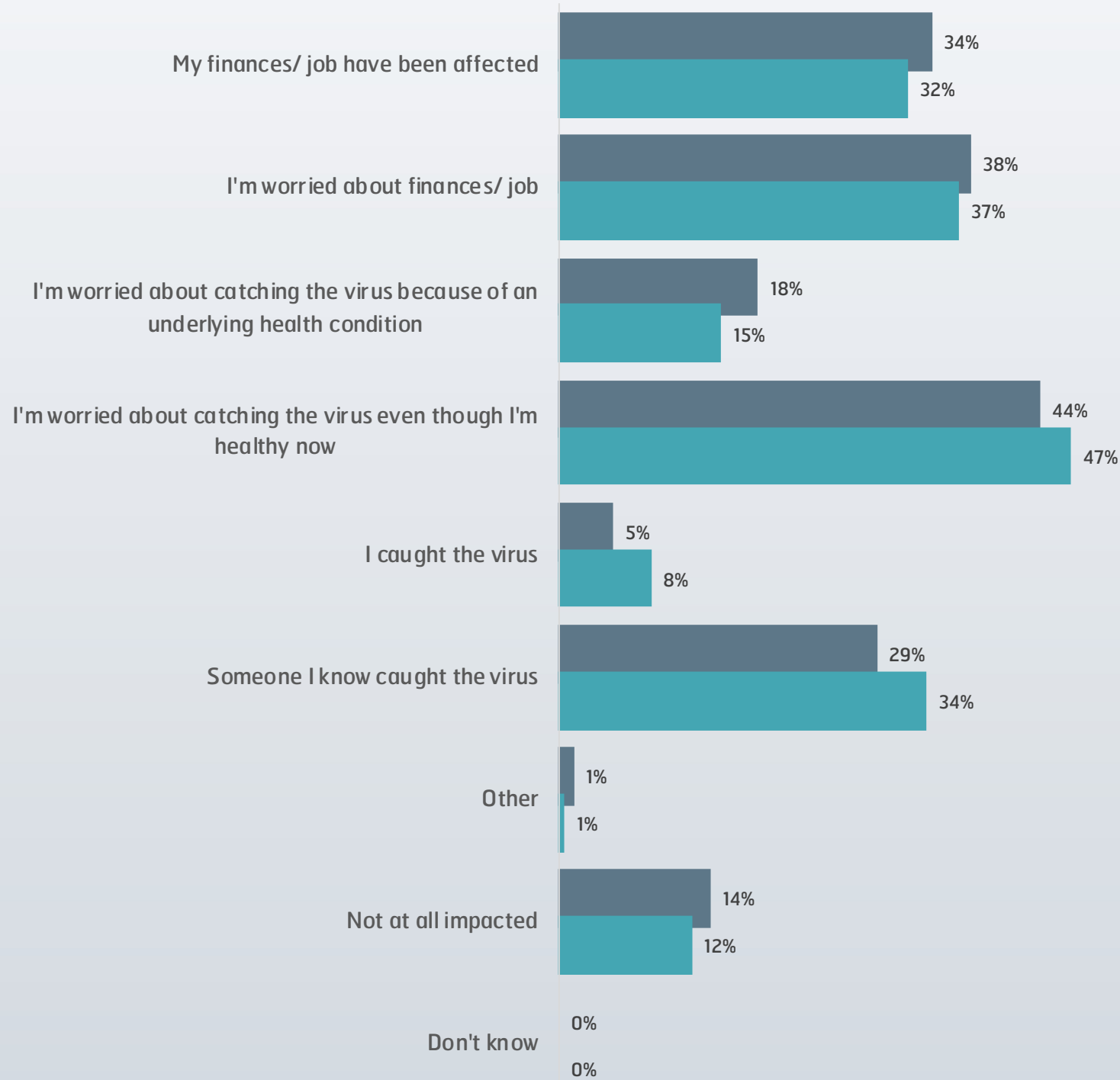
# Q3. How have you been impacted, if at all, by the COVID-19 pandemic?

## Global

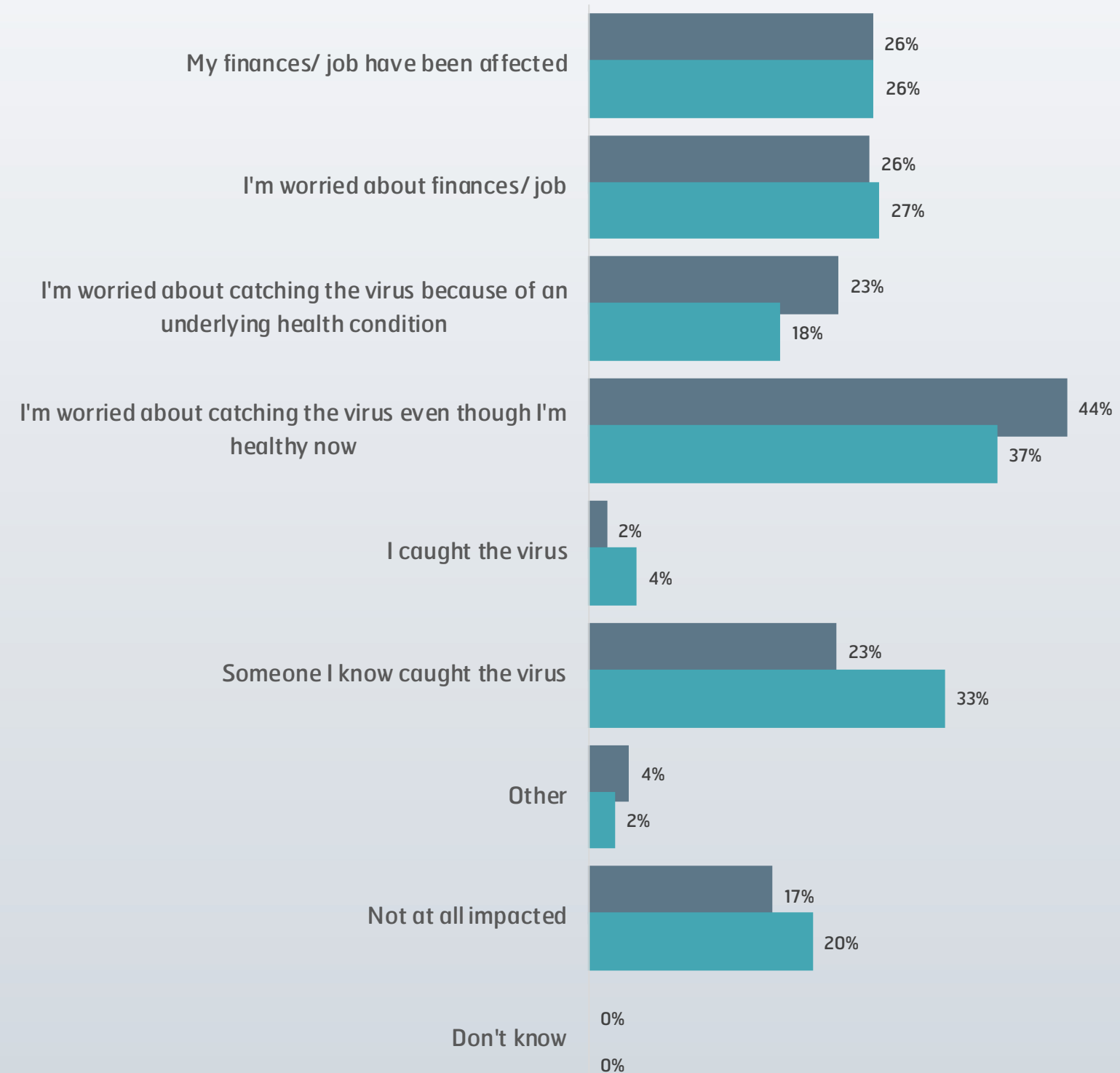


# Q3. How have you been impacted, if at all, by the COVID-19 pandemic?

18-44



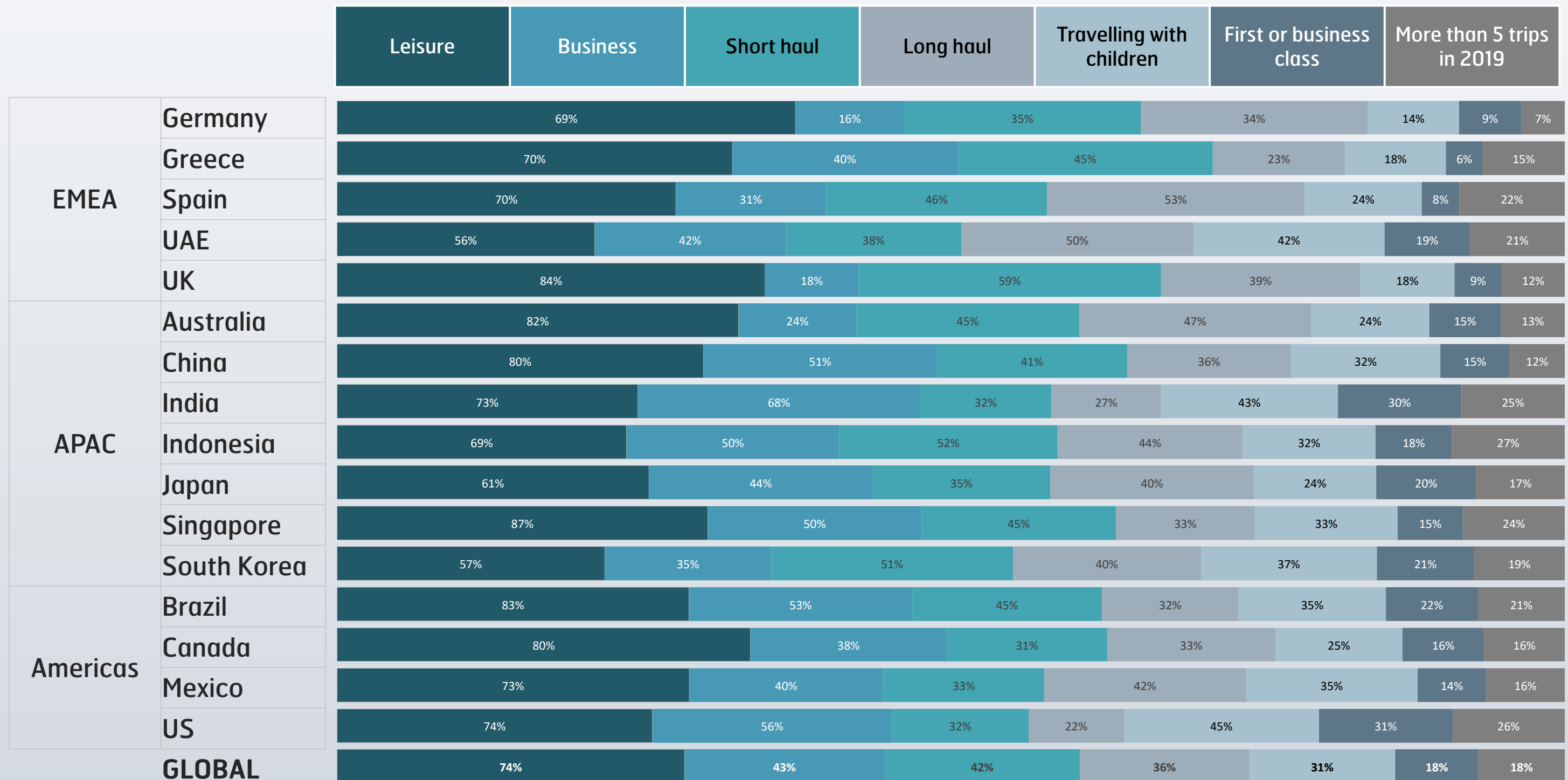
45-65+



2020 2021

# Q4. In 2019, before the pandemic, which of these types of air travel did you take?

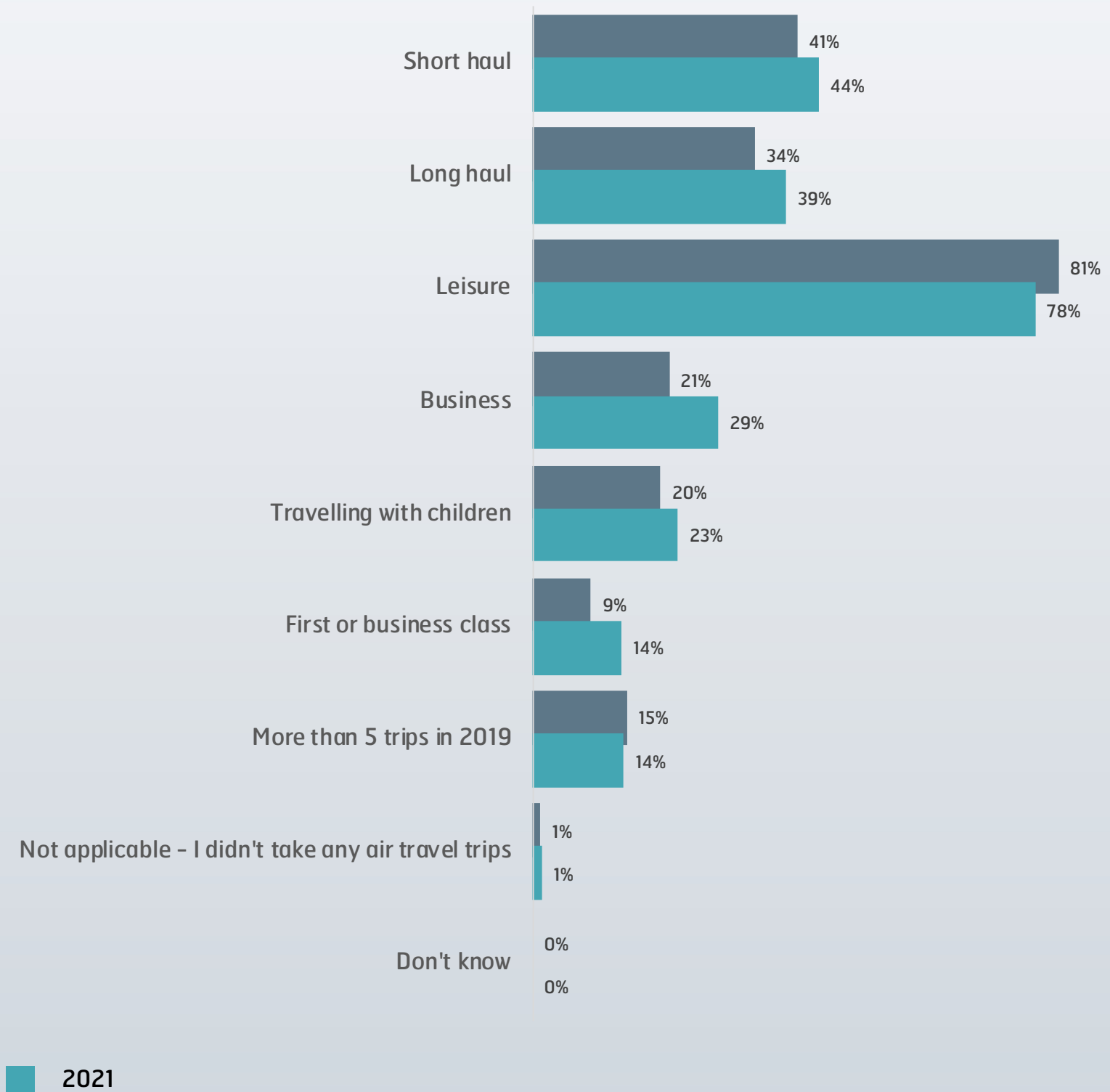
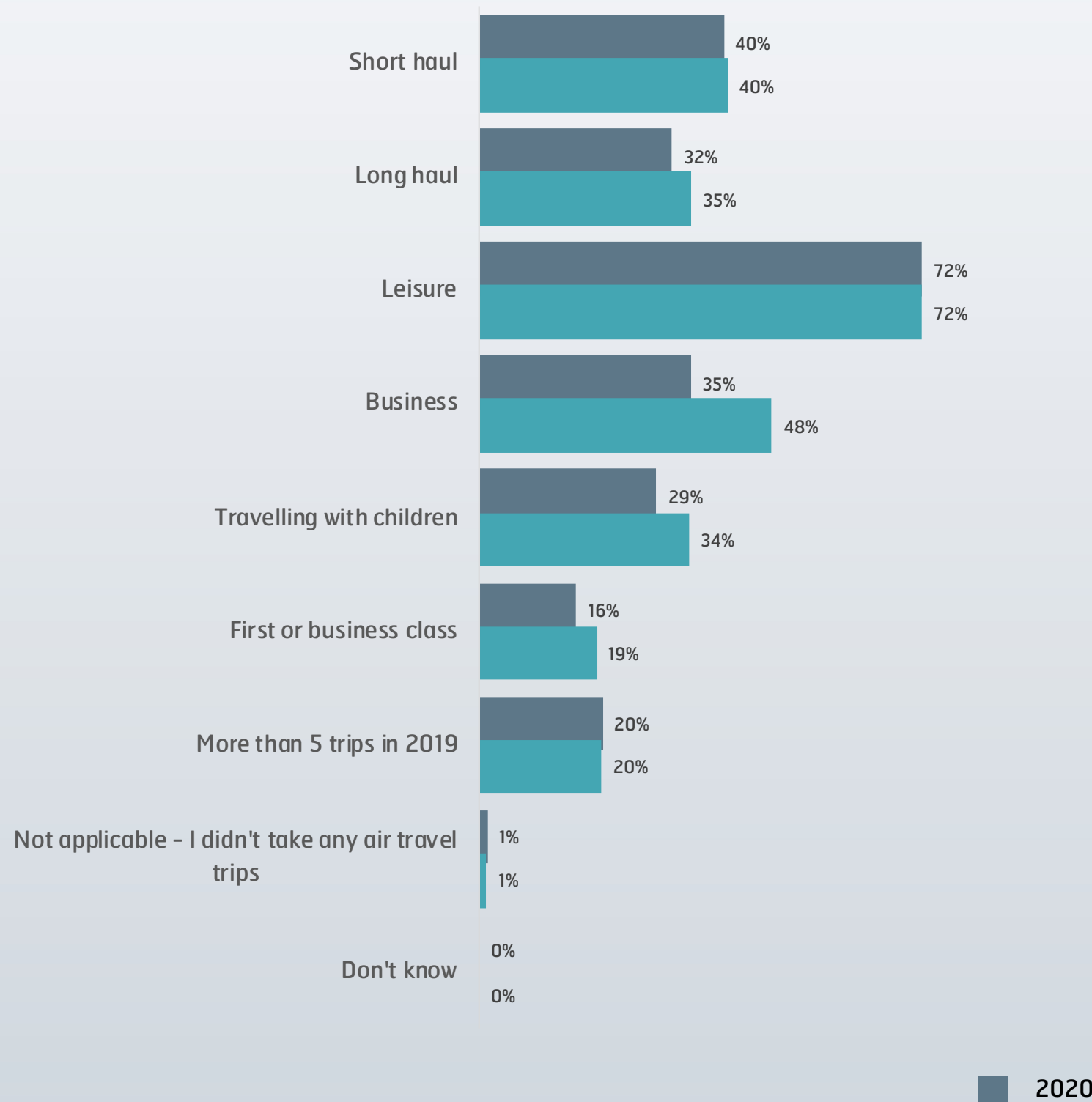
Types of air travel trips taken before the pandemic



# Q4. In 2019, before the pandemic, which of these types of air travel did you take?

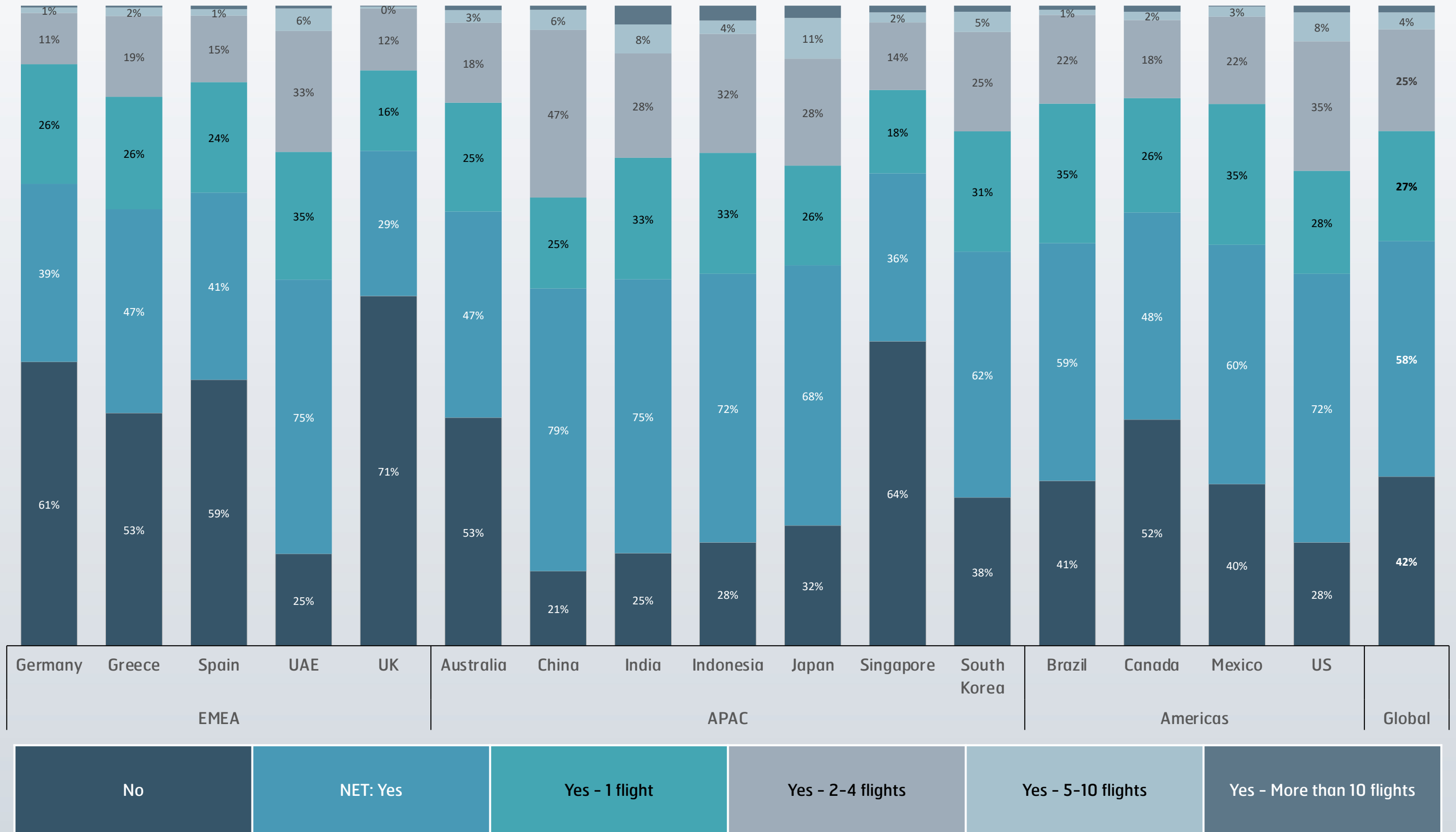
18-44

45-65+



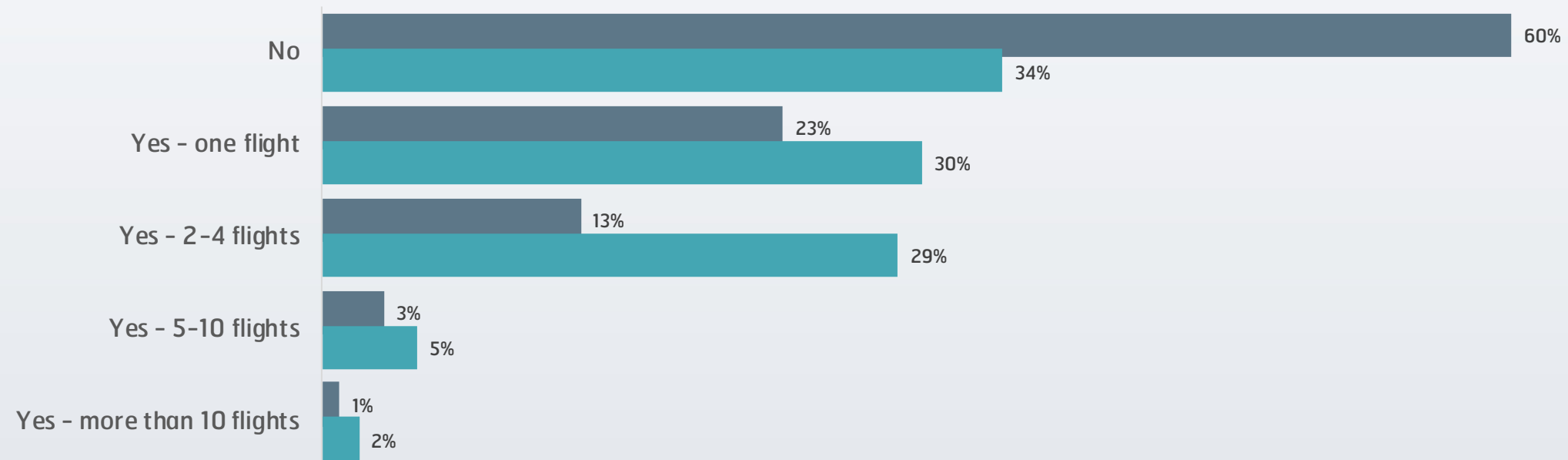
2020 2021

# Q5. Have you taken any airlines flights since the pandemic first reached your country?

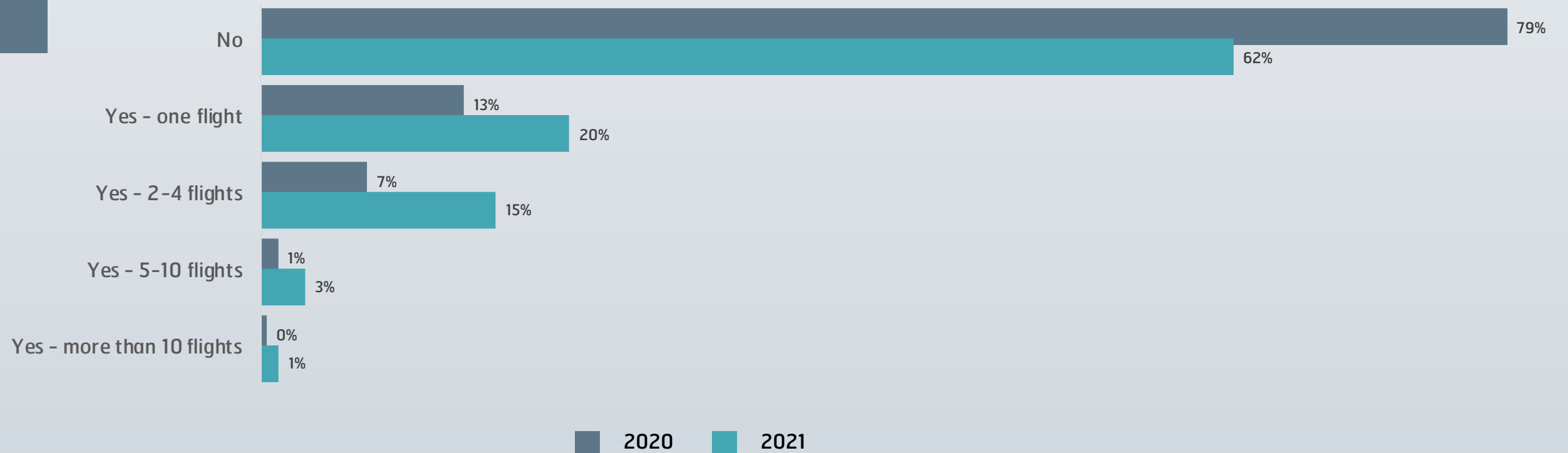


# Q5. Have you taken any airlines flights since the pandemic first reached your country?

18-44



45-65+



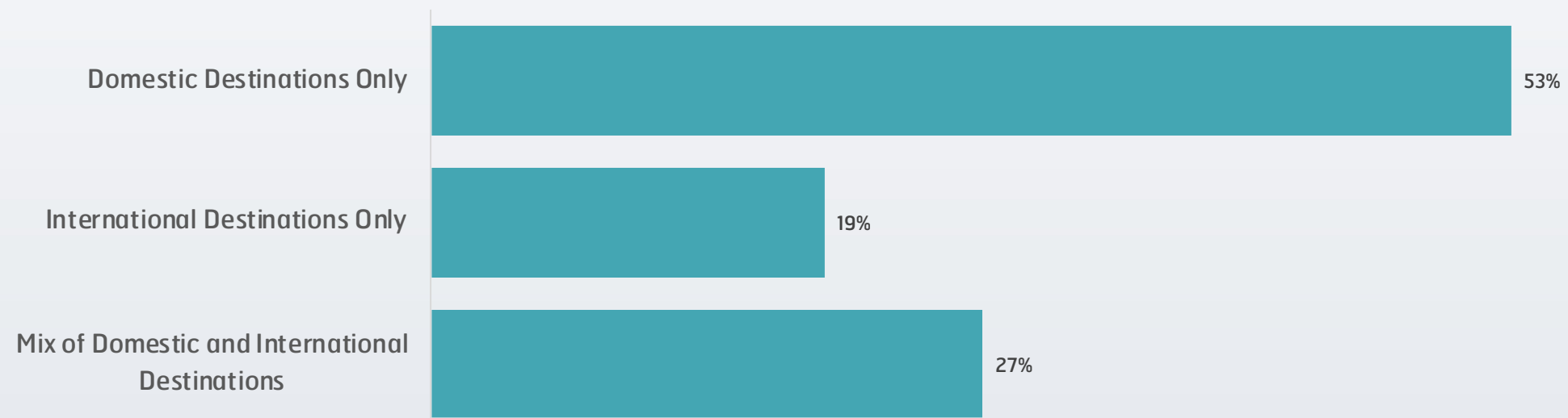


# Q5A. For flights taken since the pandemic first reached your country, which destinations did you fly to?

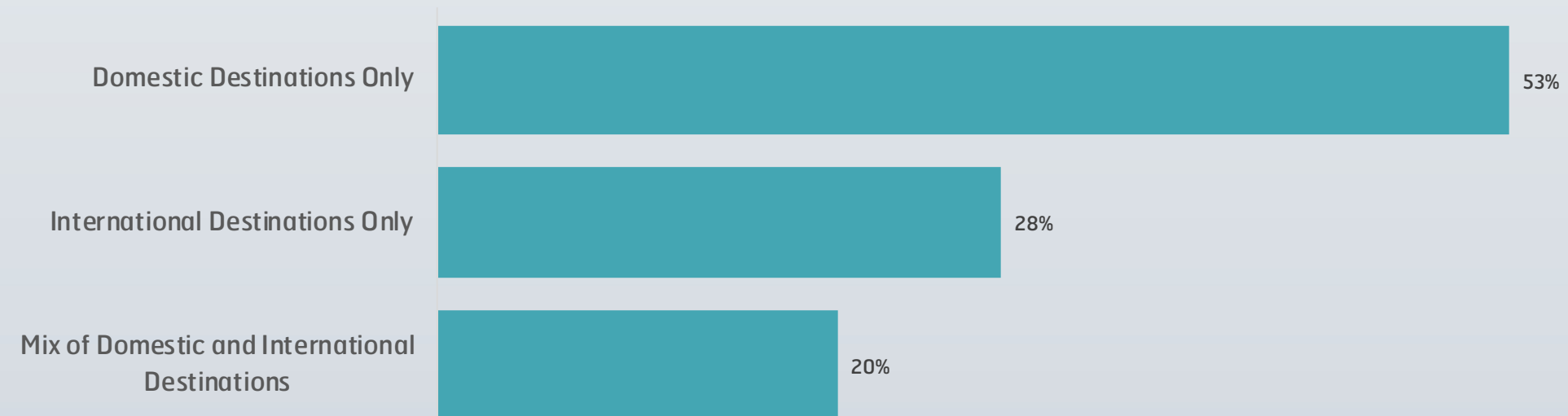


# Q5A. For flights taken since the pandemic first reached your country, which destinations did you fly to?

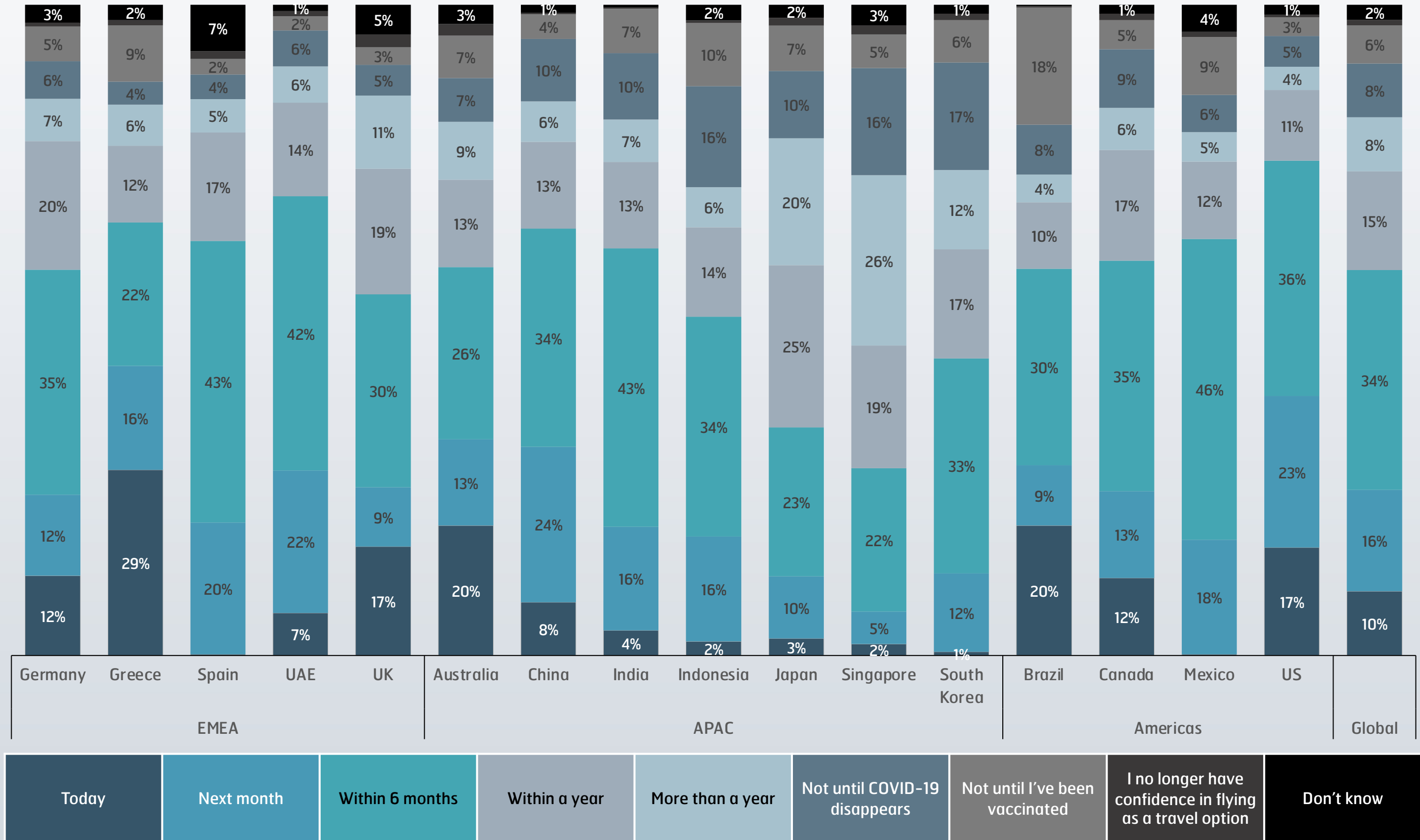
18-44



45-65+



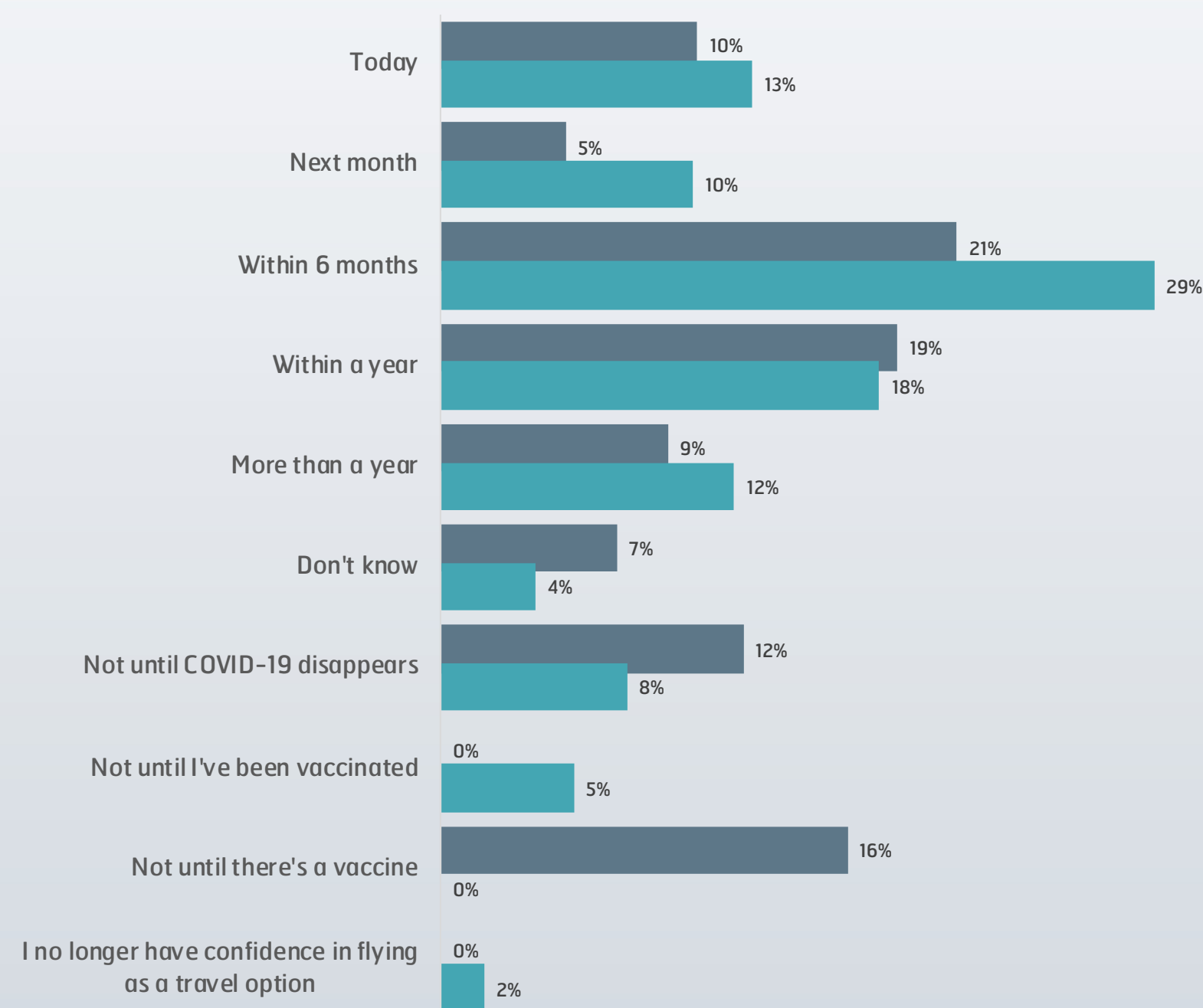
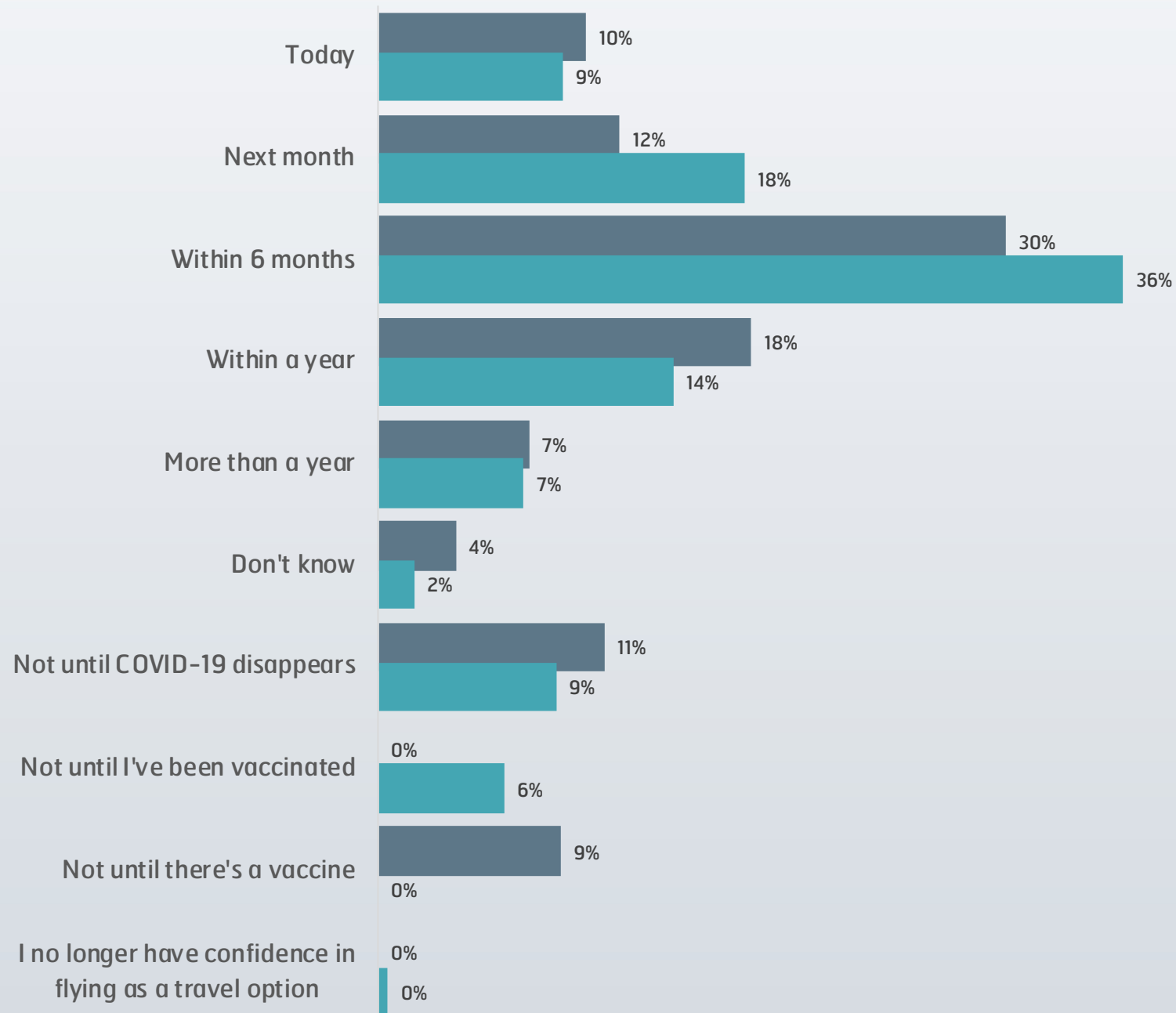
# Q6. When would you be confident to take your next flight?



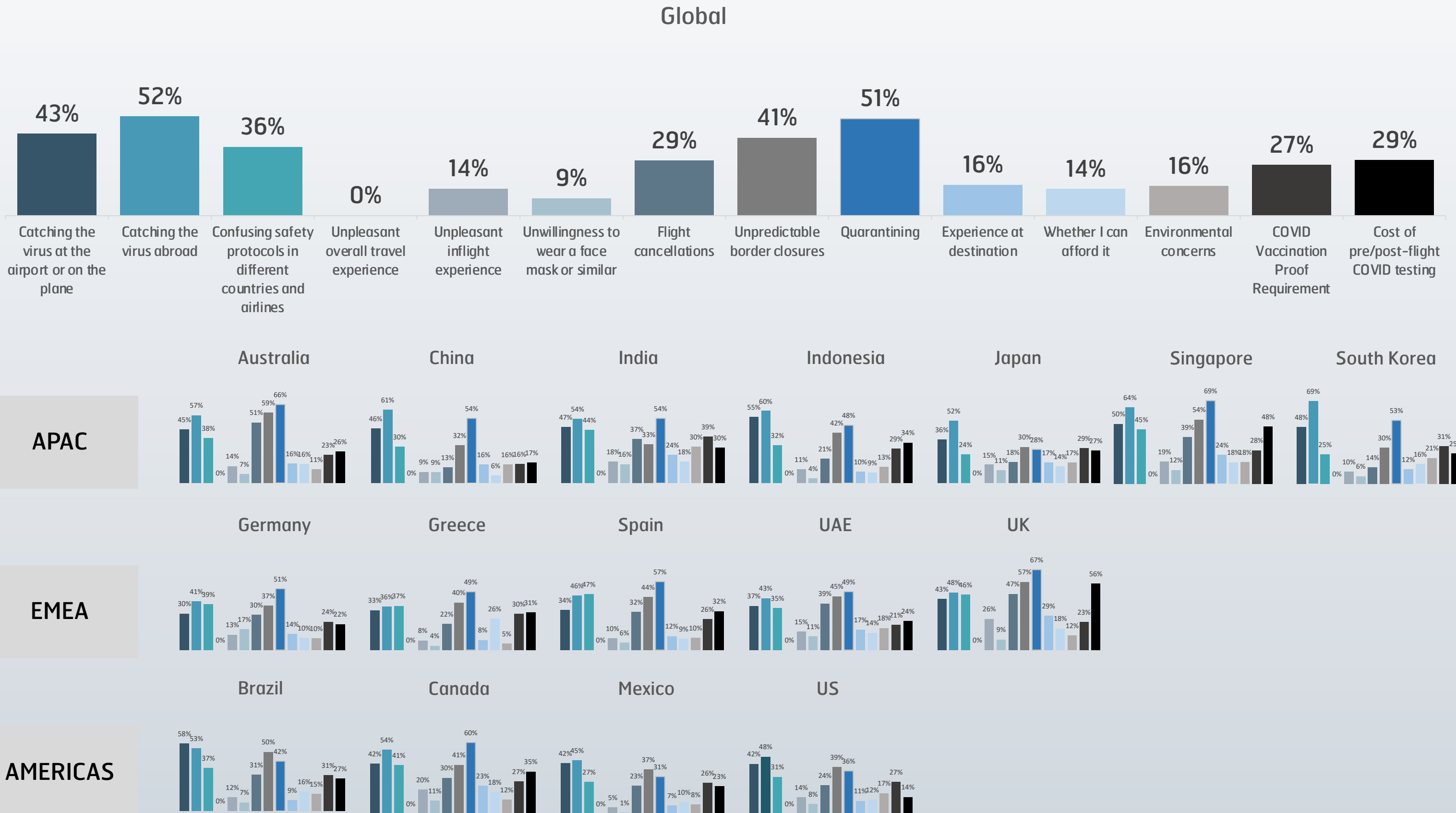
# Q6. When would you be confident to take your next flight?

18-44

45-65+

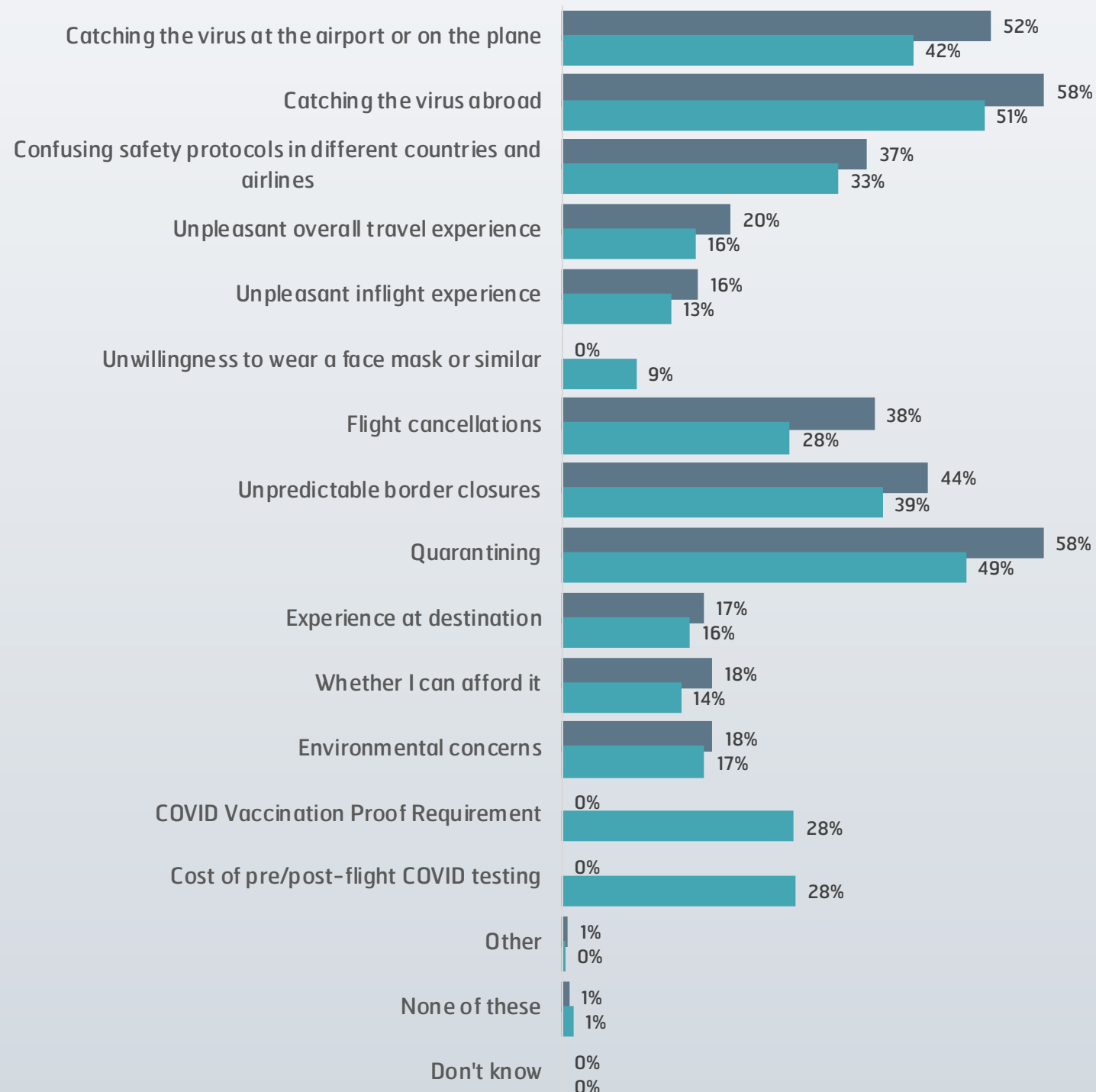


# Q7. What are your main worries that prevent you from travelling abroad right now?

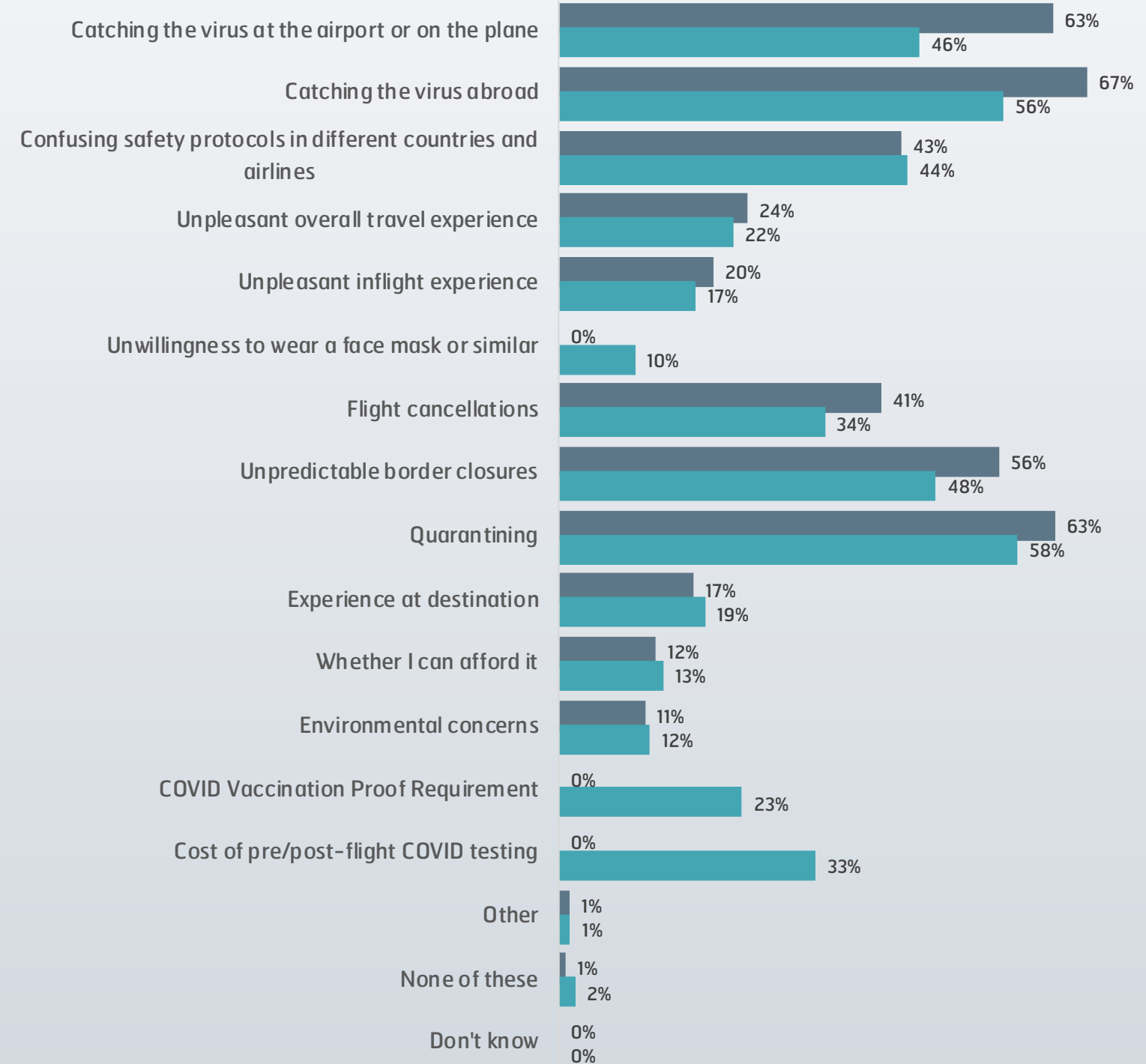


# Q7. What are your main worries that prevent you from travelling abroad right now?

18-44



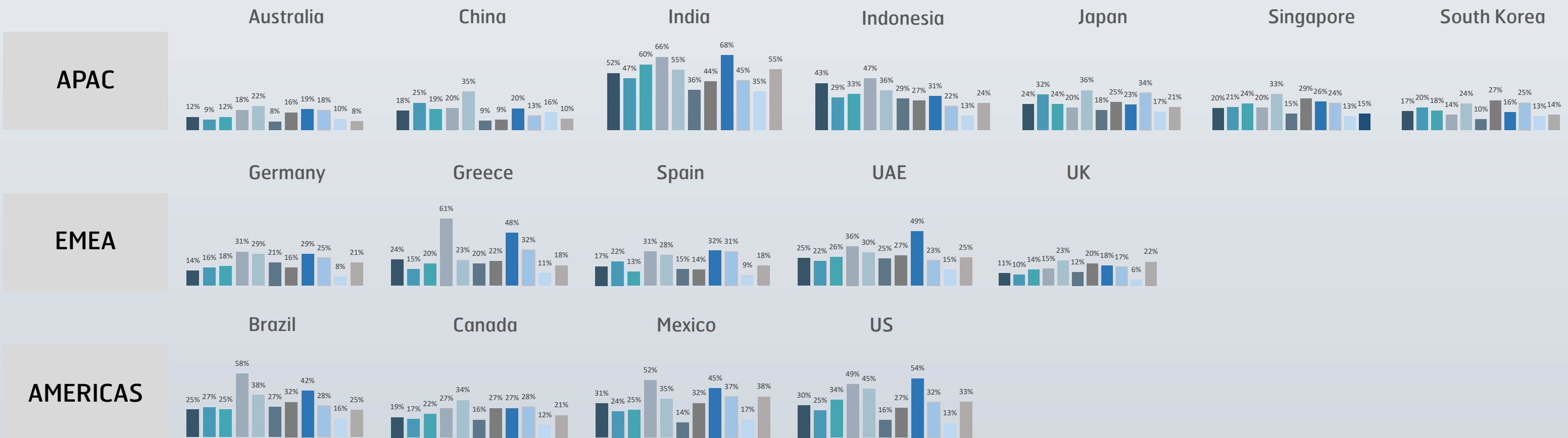
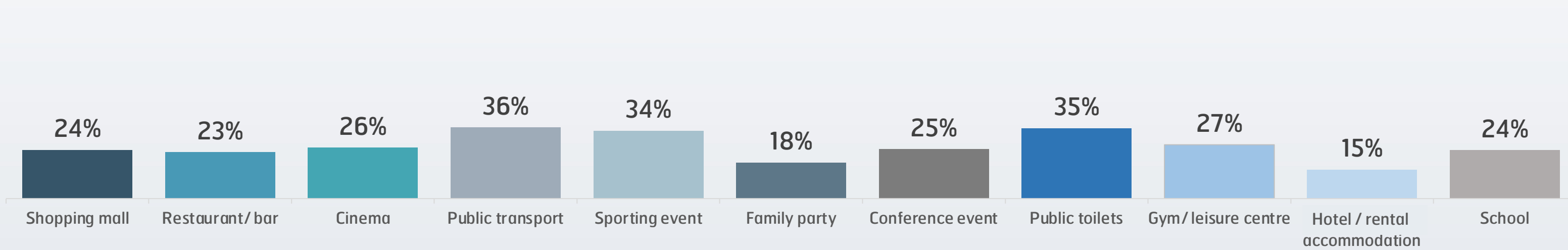
45-65+



2020 2021

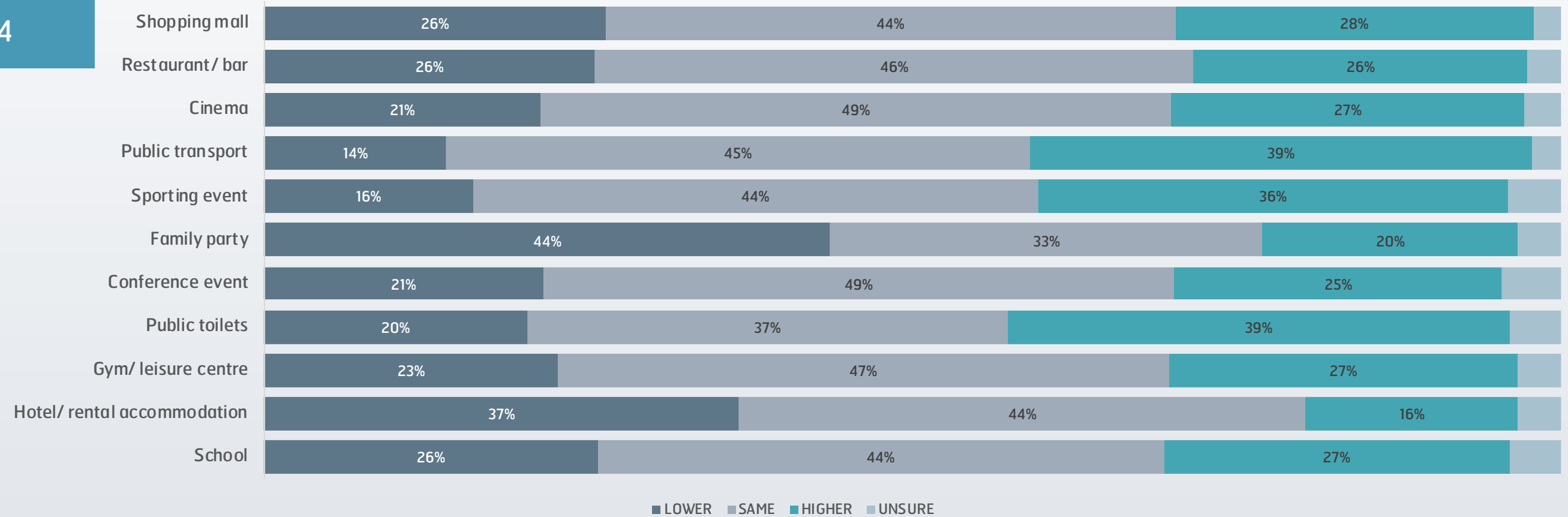
# Q8. In comparison to catching a flight, would you consider these places to be lower or higher risk for catching the virus? [Higher risk figures shown]

## Global

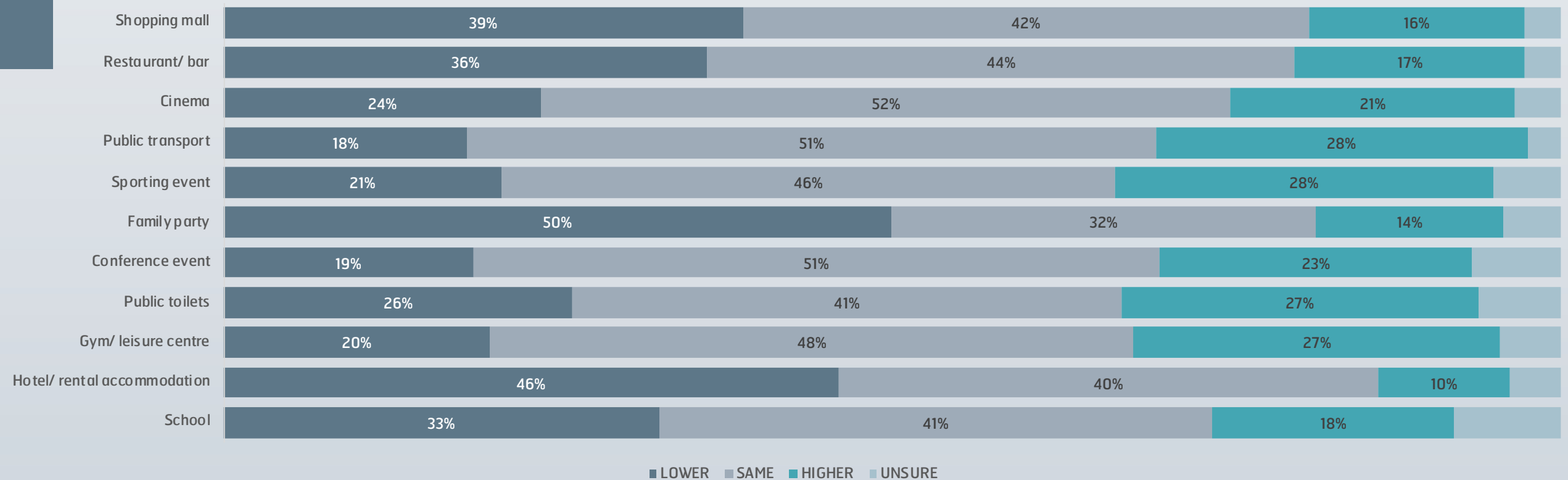


# Q8. In comparison to catching a flight, would you consider these places to be higher or lower risk for catching the virus?

18-44



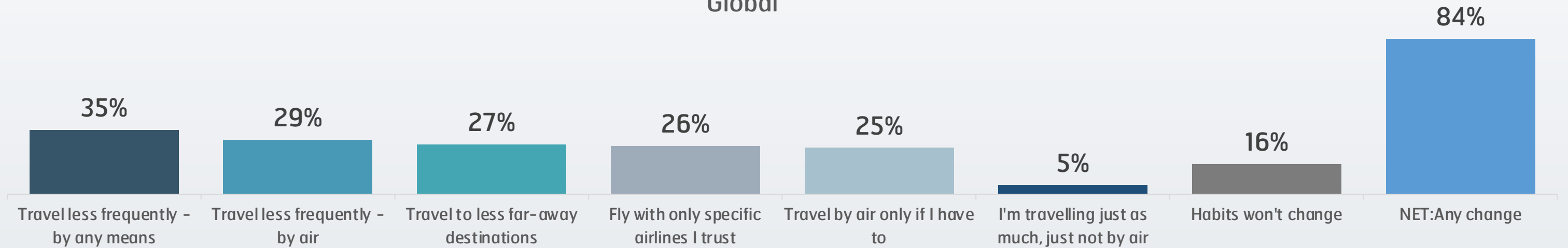
45-65+



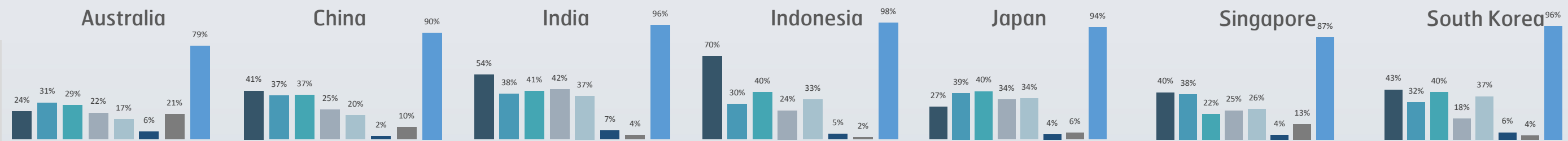


# Q9. How are your travel habits likely to change, if at all, from now on post COVID-19

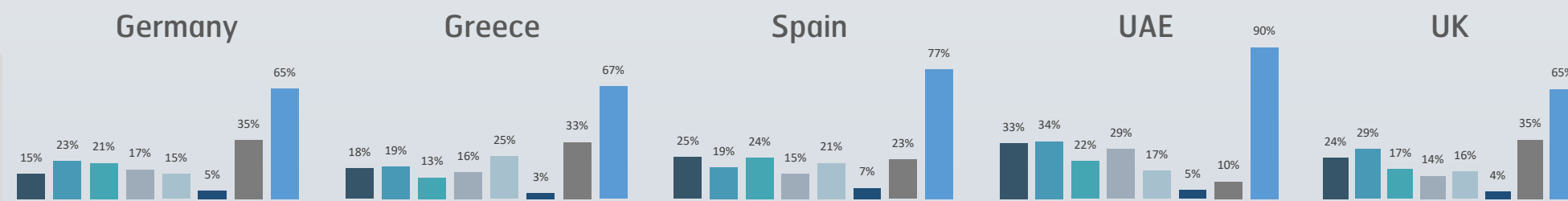
## Global



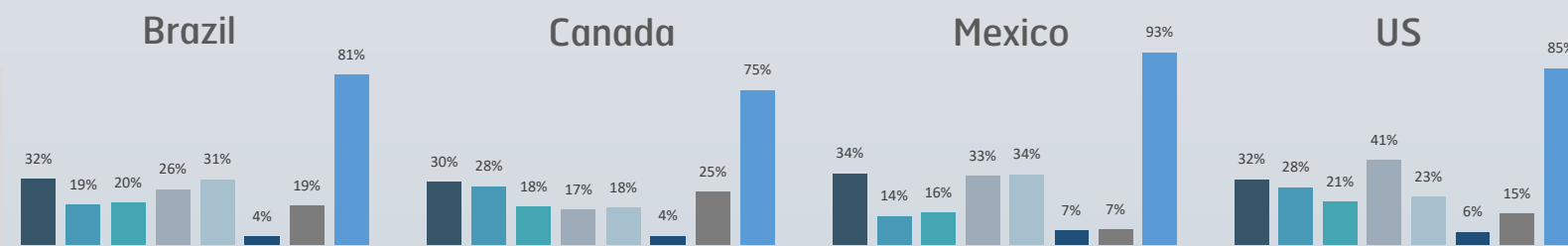
## APAC



## EMEA



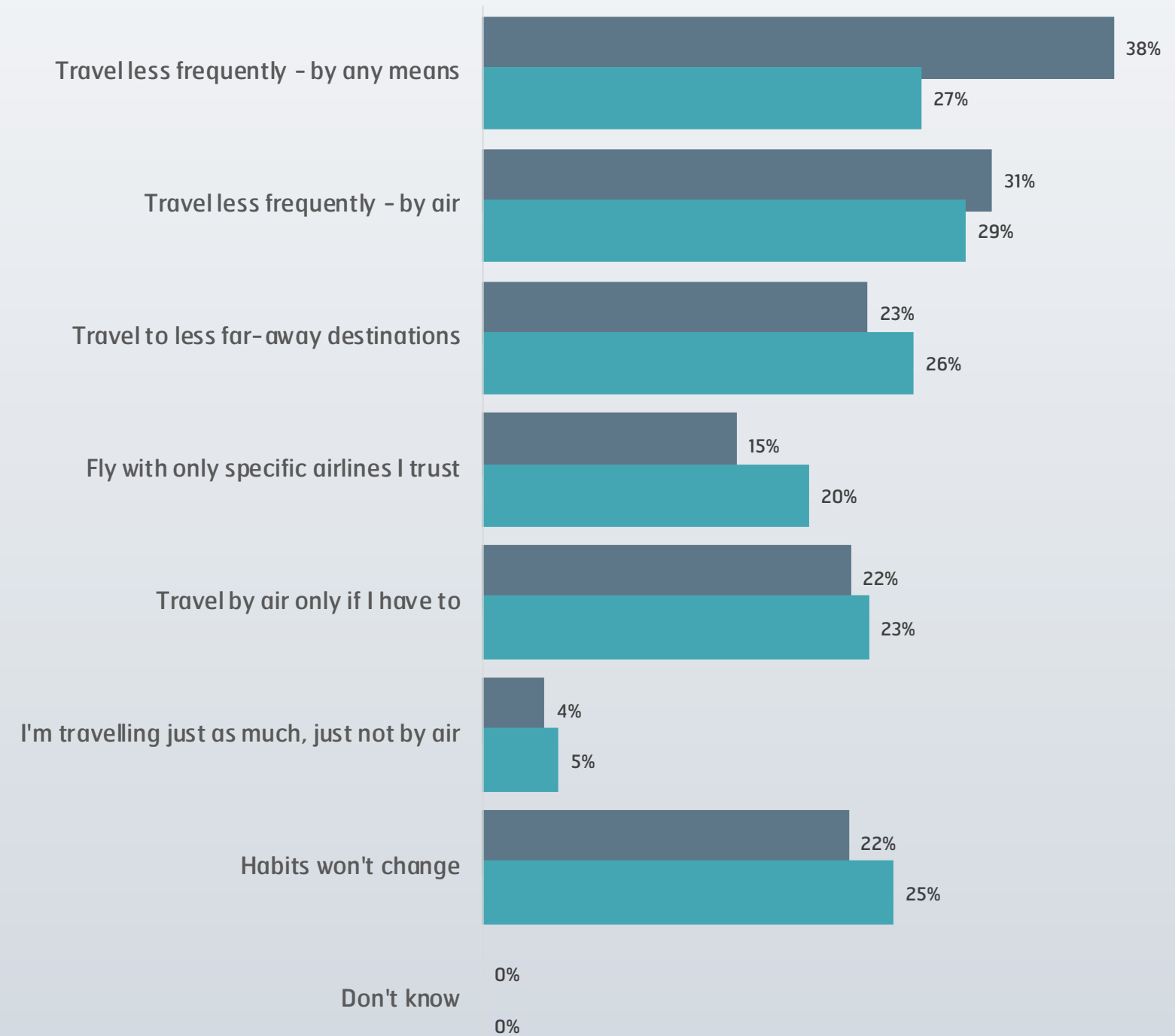
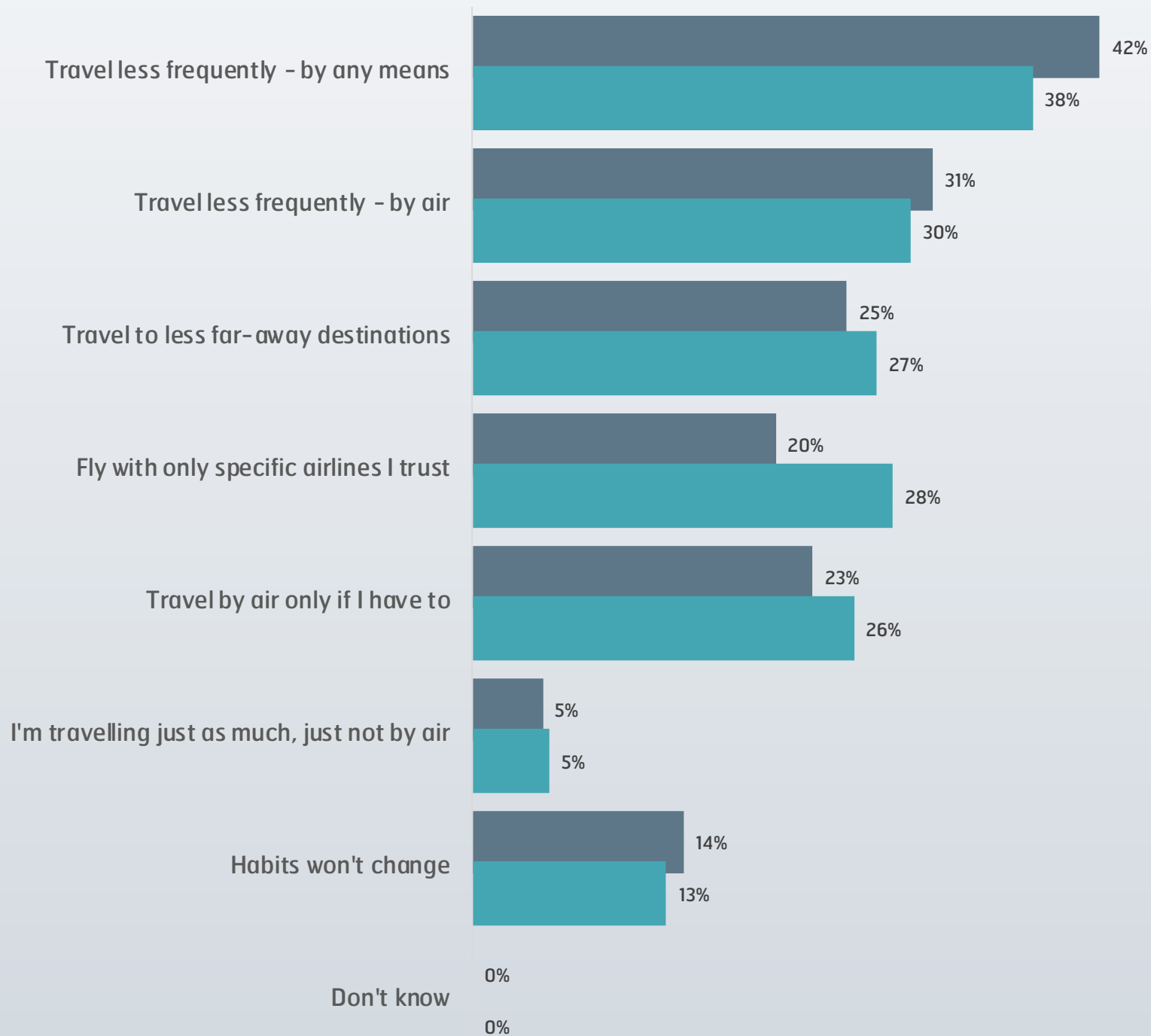
## AMERICAS



# Q9. How are your travel habits likely to change, if at all, from now on post COVID-19

18-44

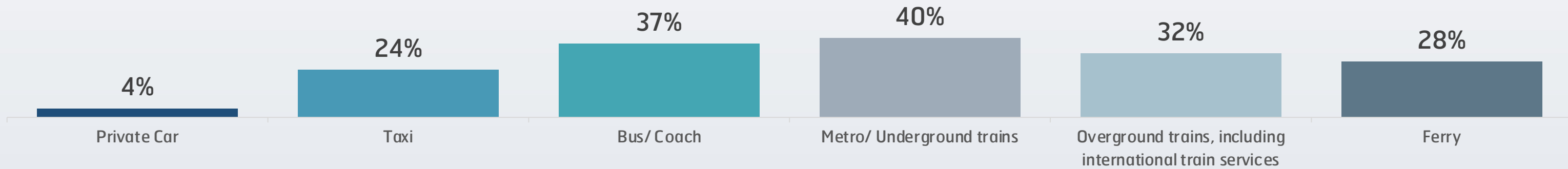
45-65+



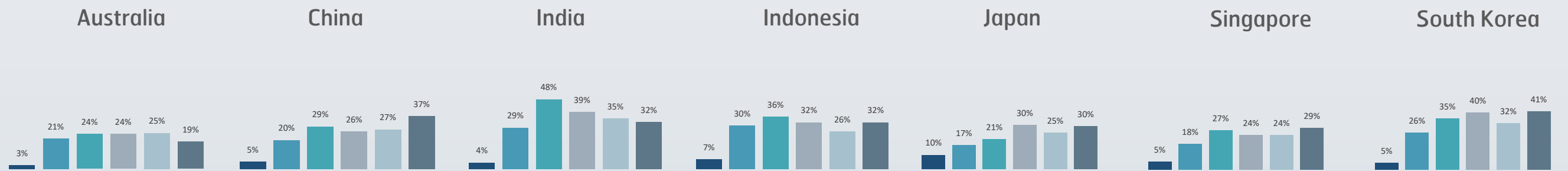
2020 2021

# Q10. In comparison to catching a flight, how confident would you feel regarding COVID-19 and being able to travel safely on the following forms of transport? [Less confident figures shown]

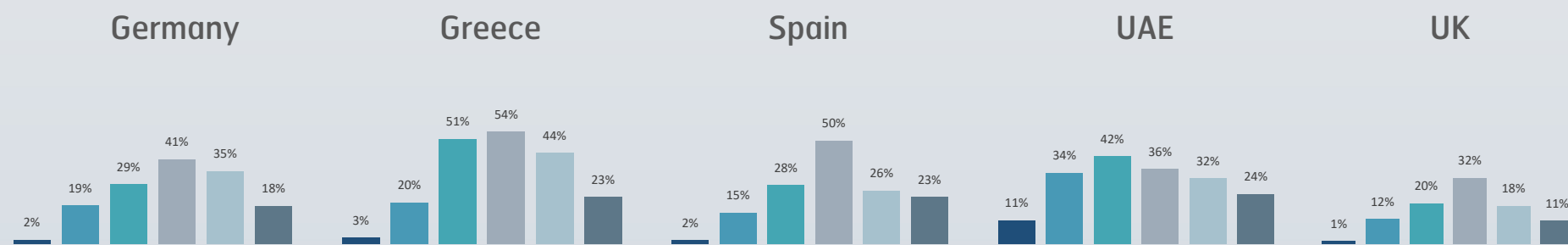
Global



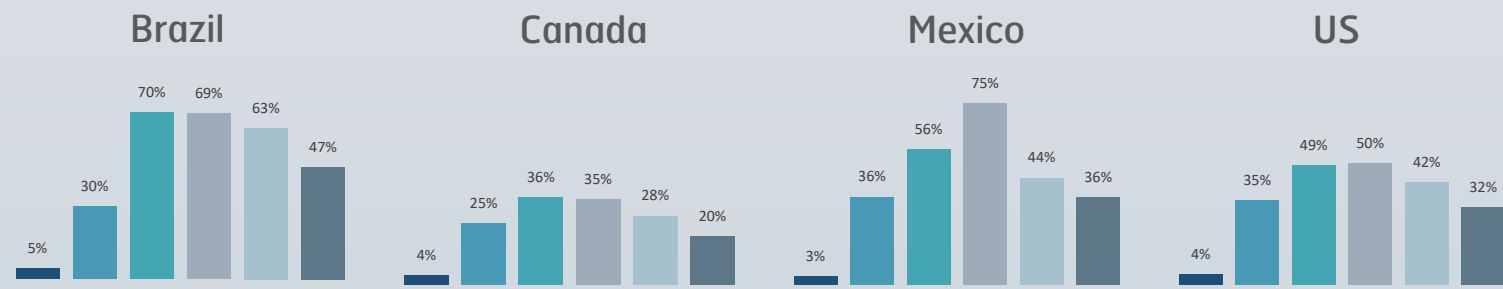
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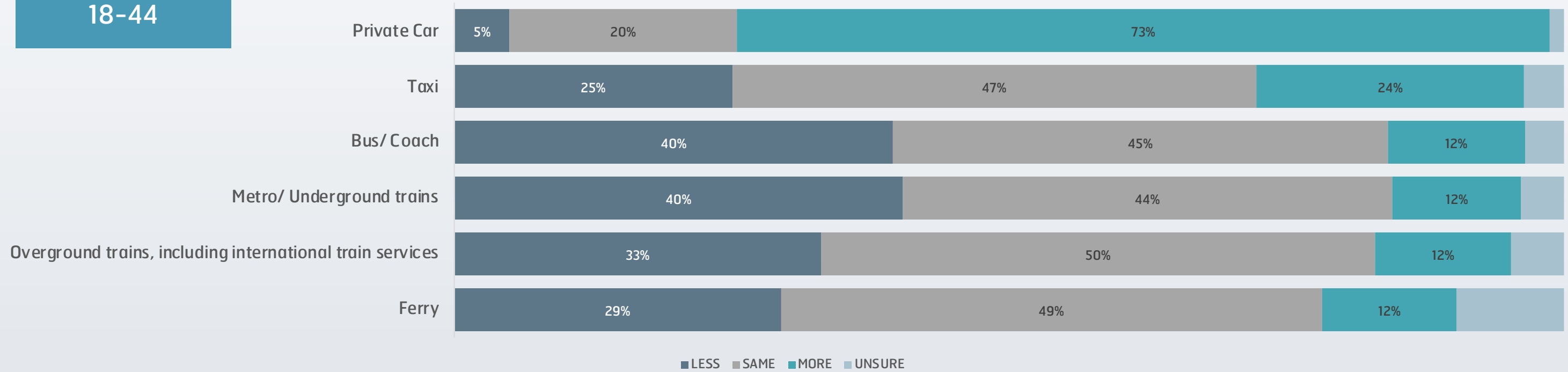


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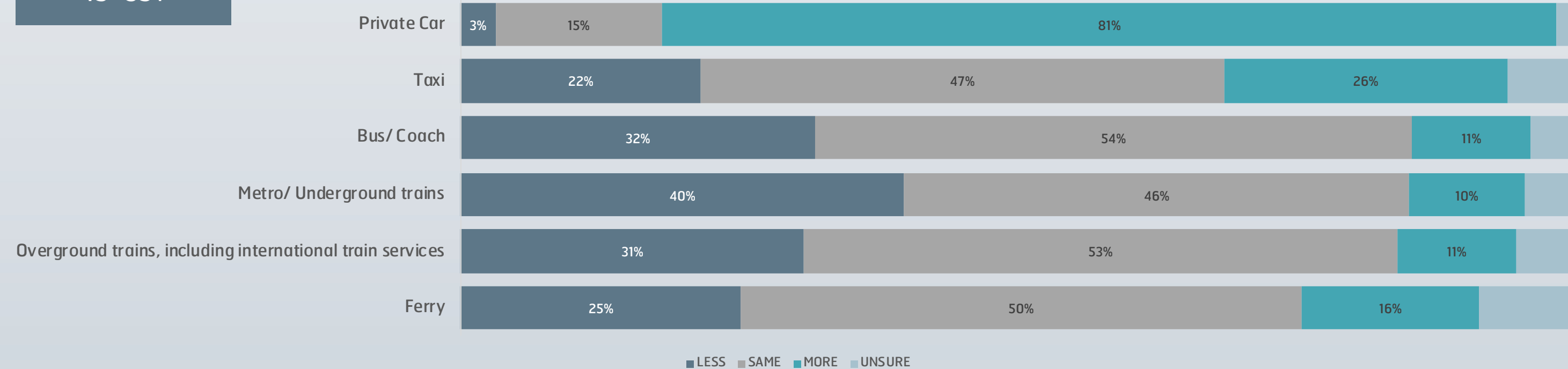


# Q10. In comparison to catching a flight, how confident would you feel regarding COVID-19 and being able to travel safely on the following forms of transport?

## 18-44

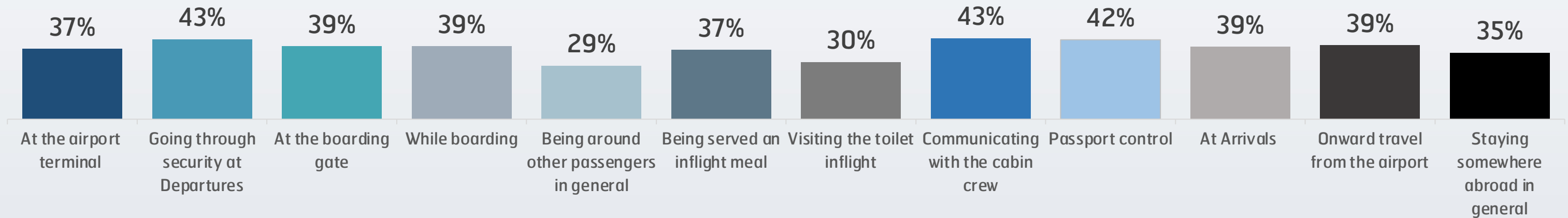


## 45-65+

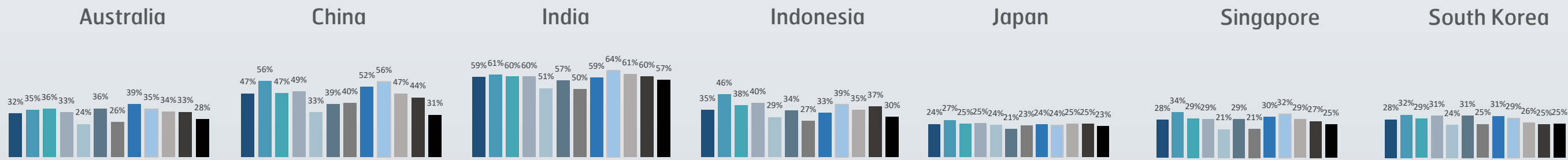


# Q11. How confident would you feel regarding safety/health precautions at the following points in an air journey?

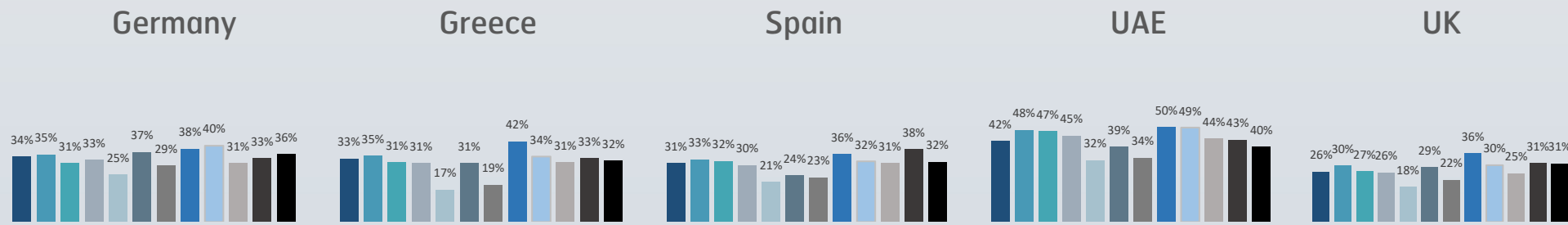
## Global



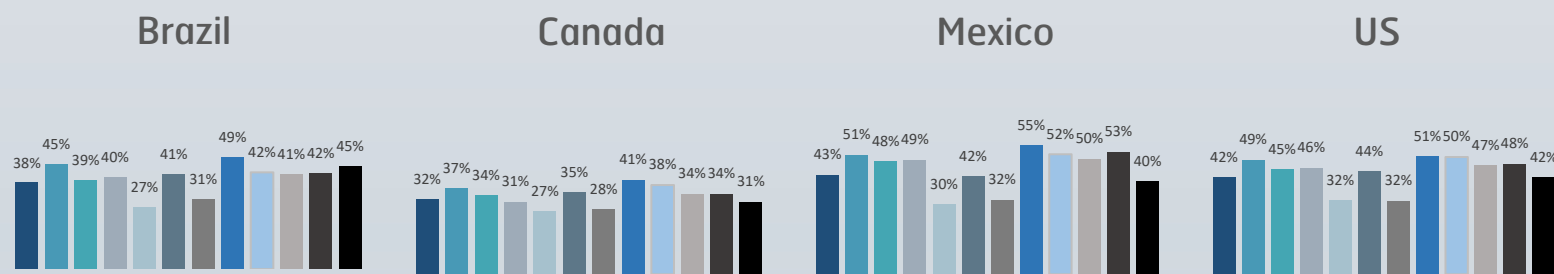
## APAC



## EMEA

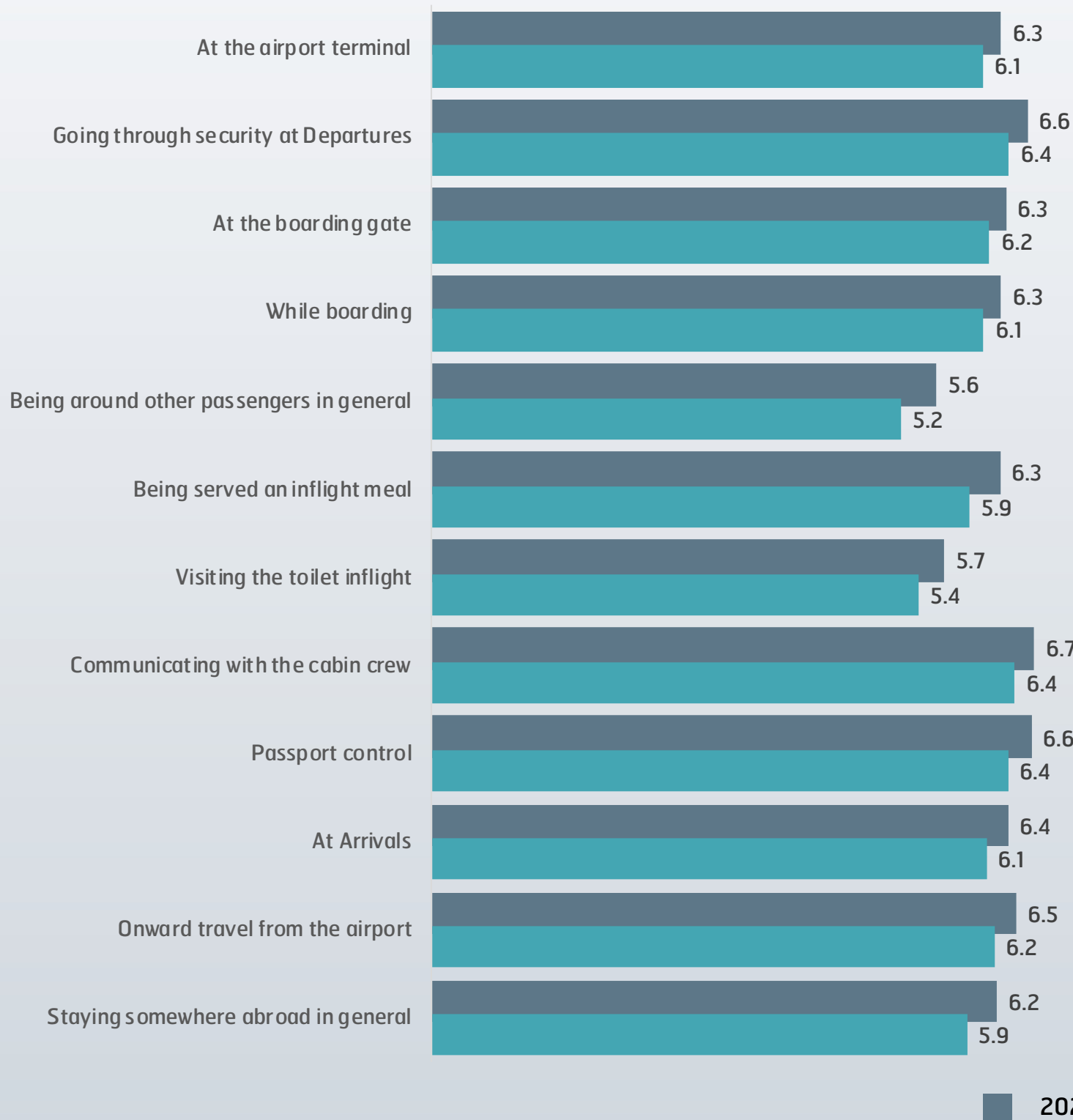


## AMERICAS

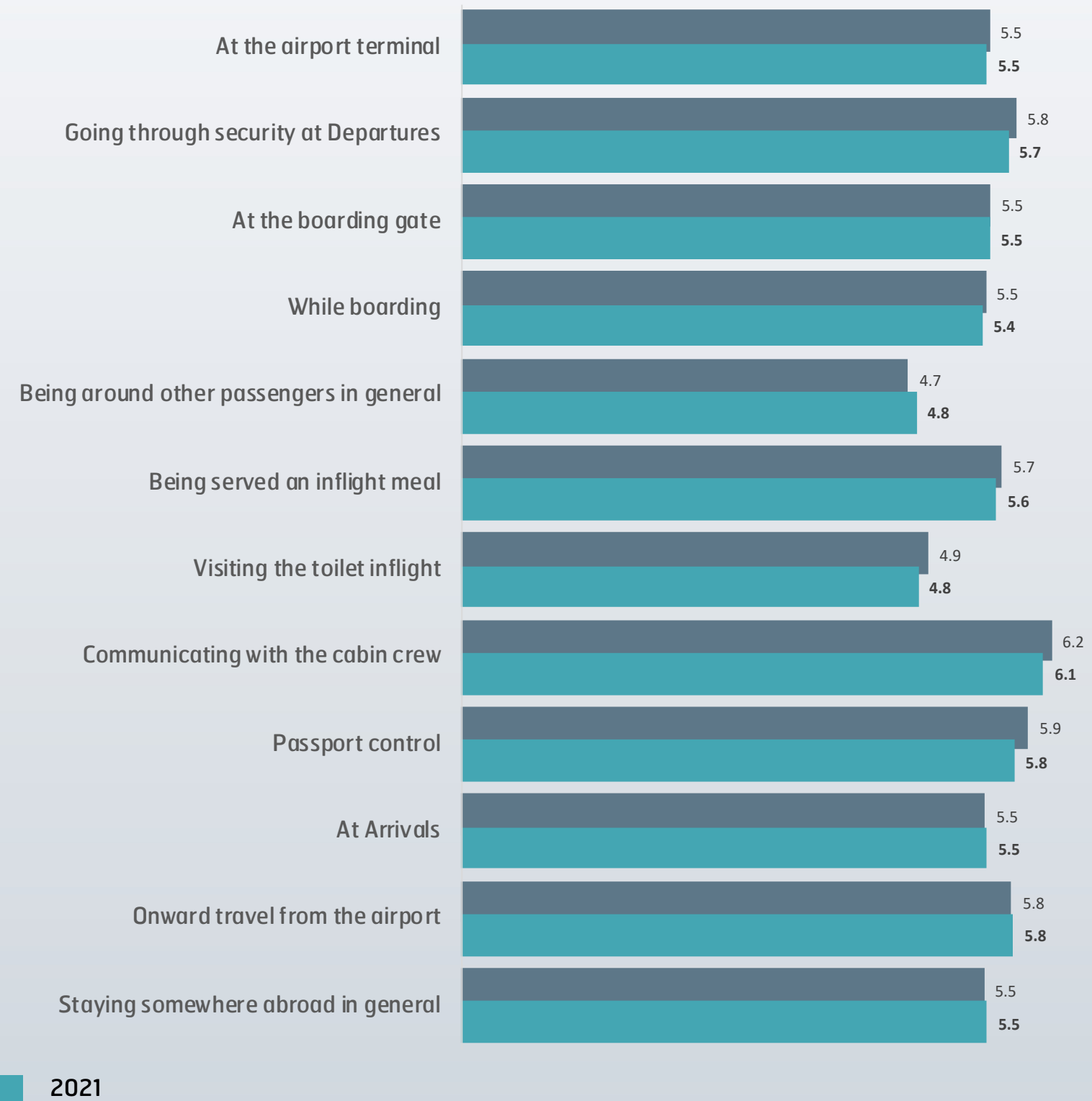


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18-44



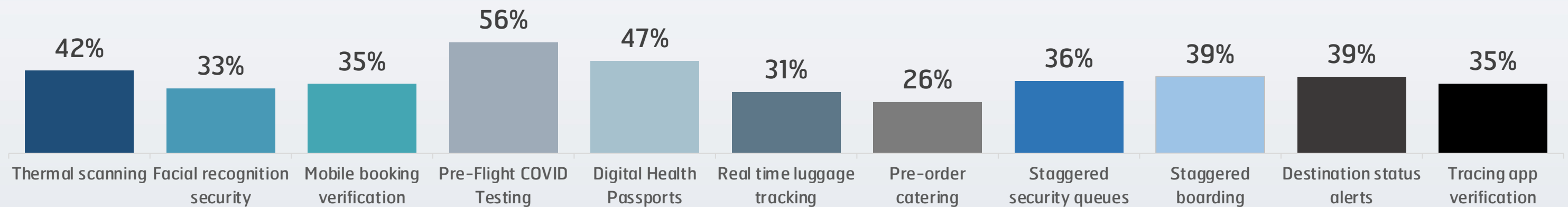
45-65+



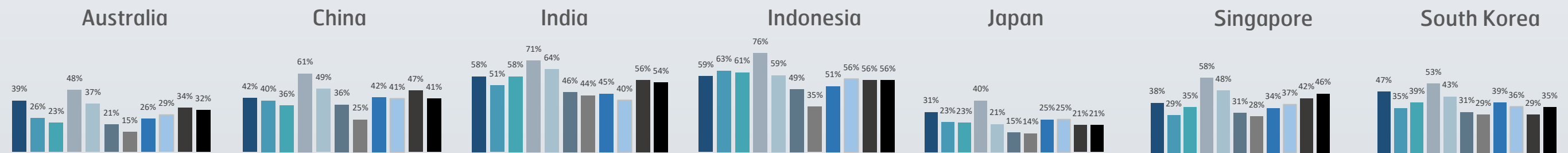
2020 2021

# Q12A. When considering taking an air journey, how much would the following improve your confidence within the airport and during boarding?

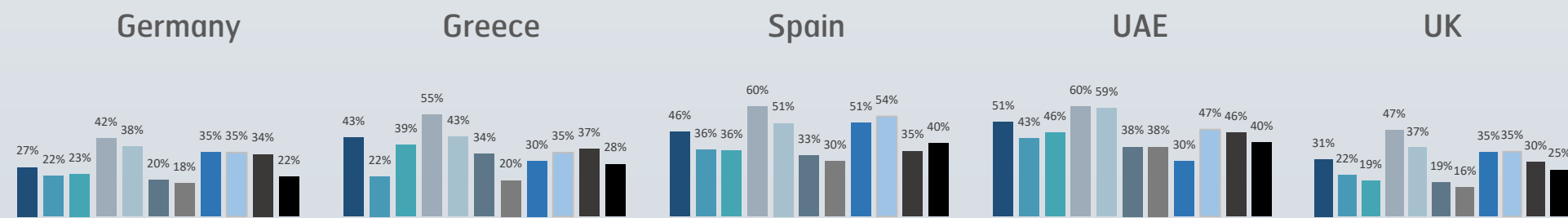
## Global



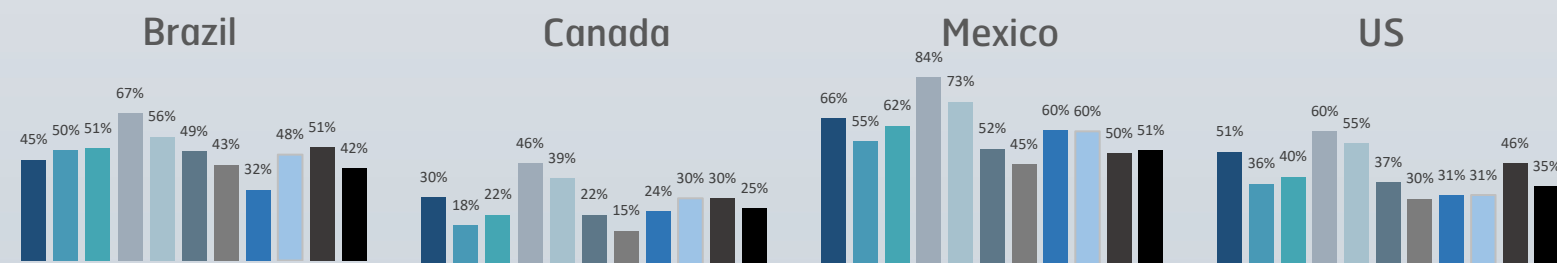
## APAC



## EMEA

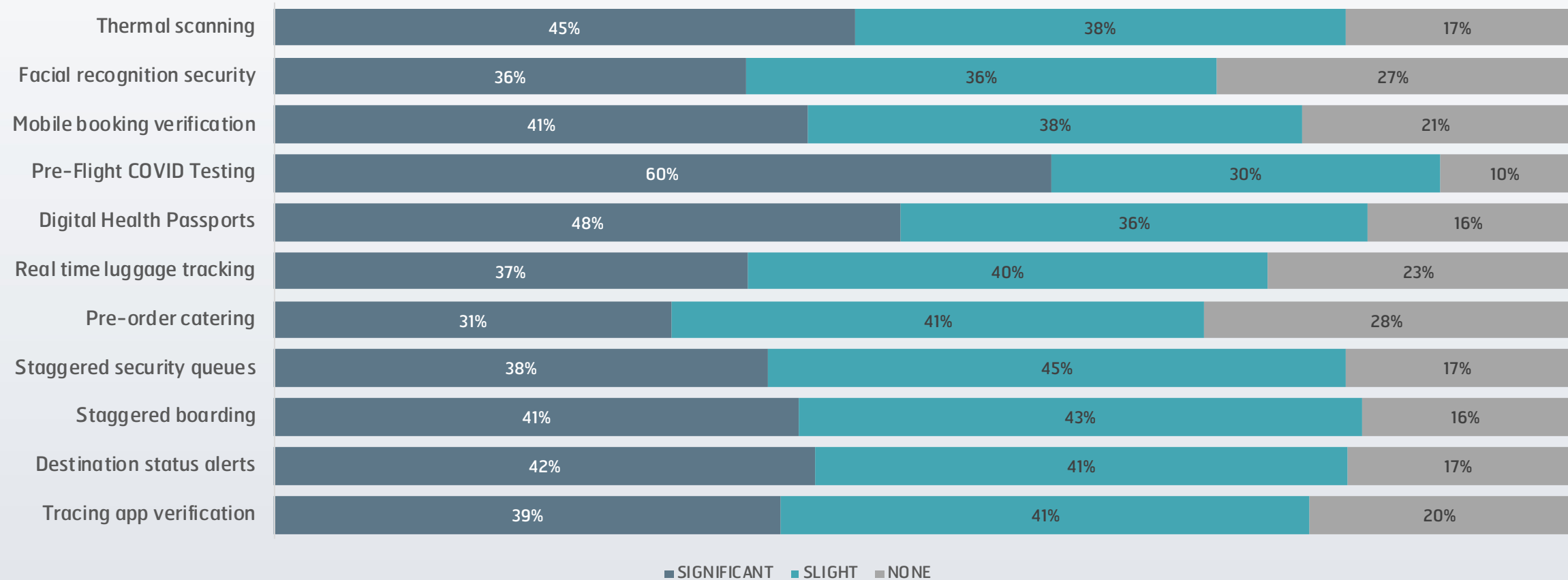


## AMERICAS

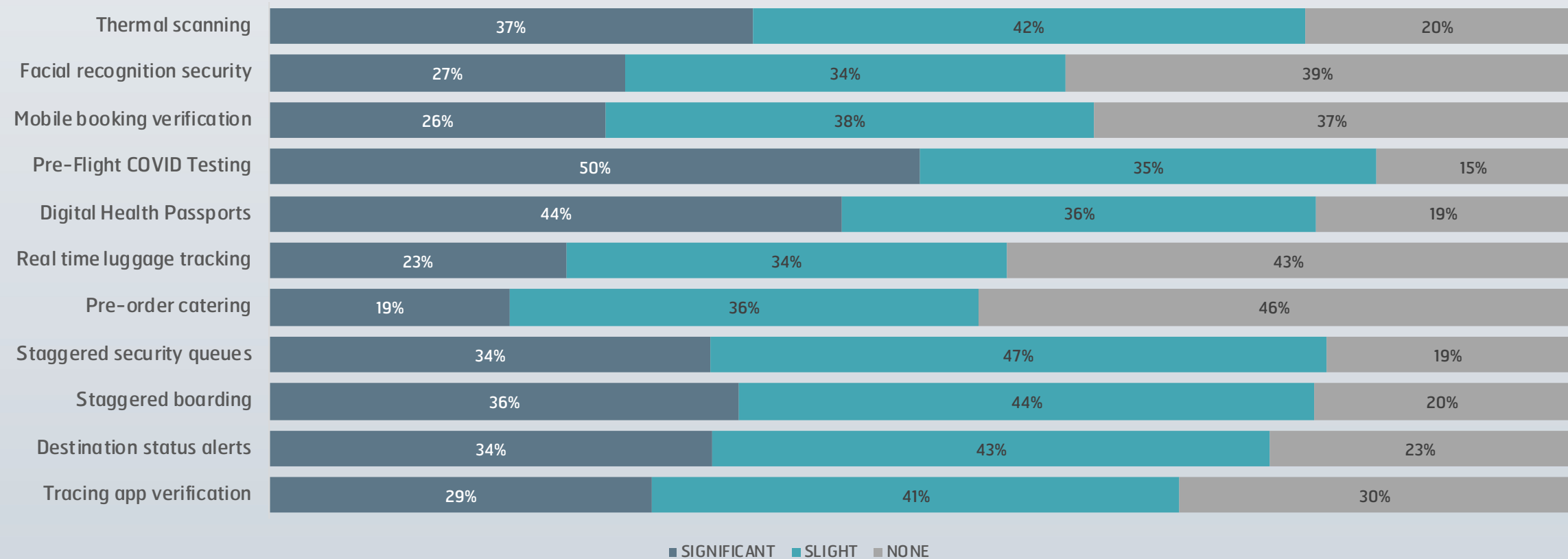


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18-44



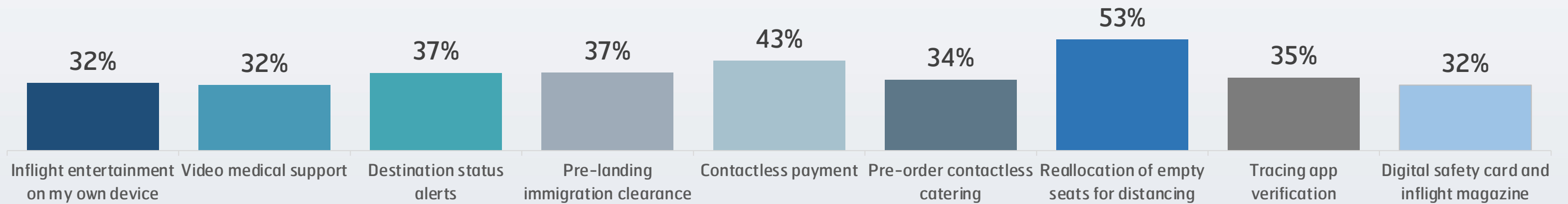
45-65+



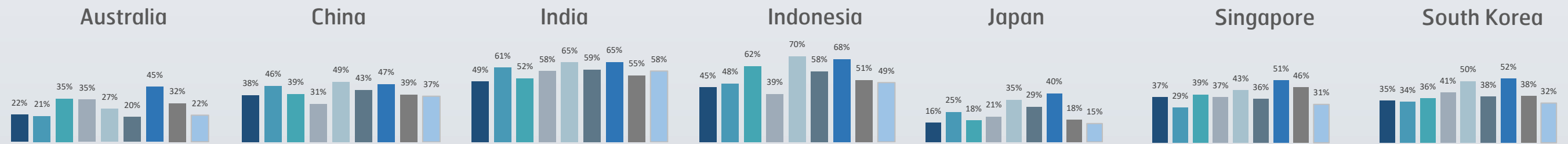


# Q13A. When considering taking an air journey, how much would the following improve your confidence during the flight itself?

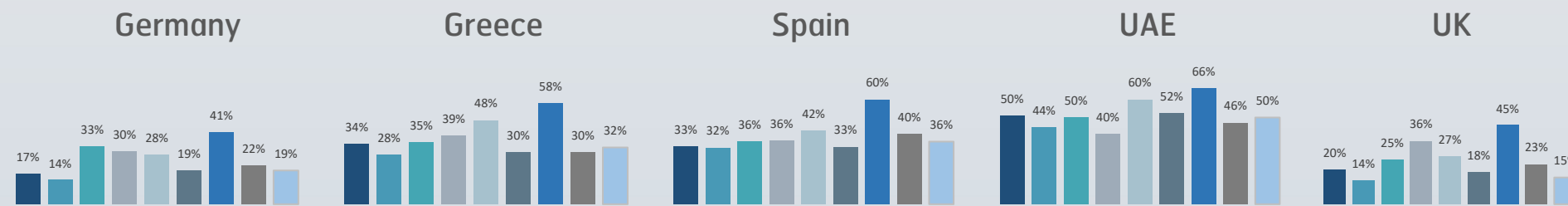
## Global



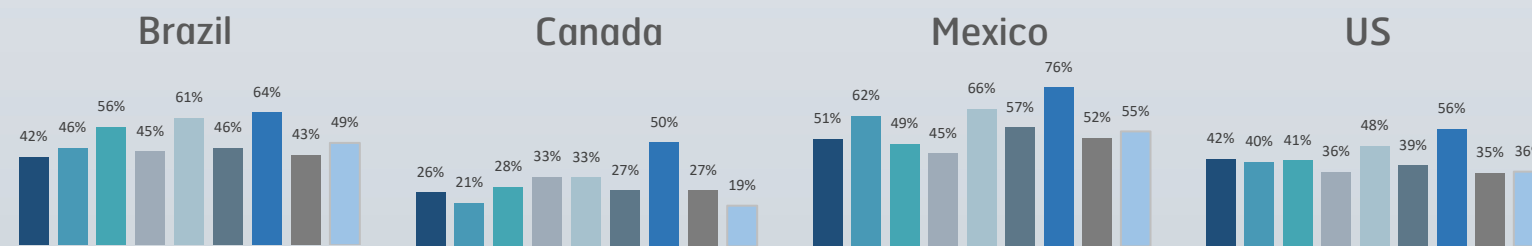
## APAC



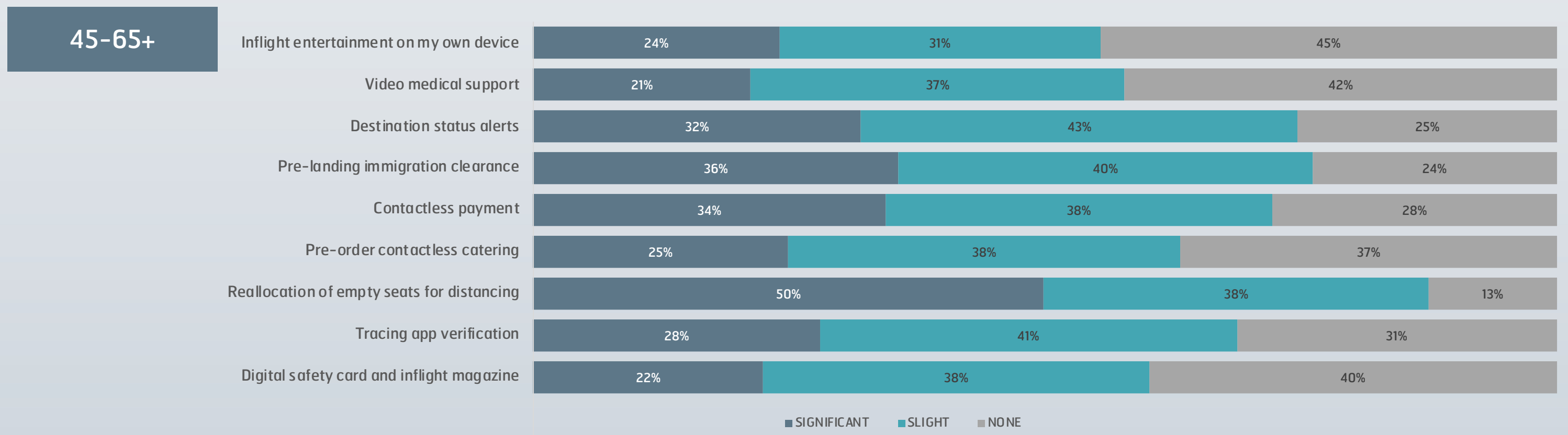
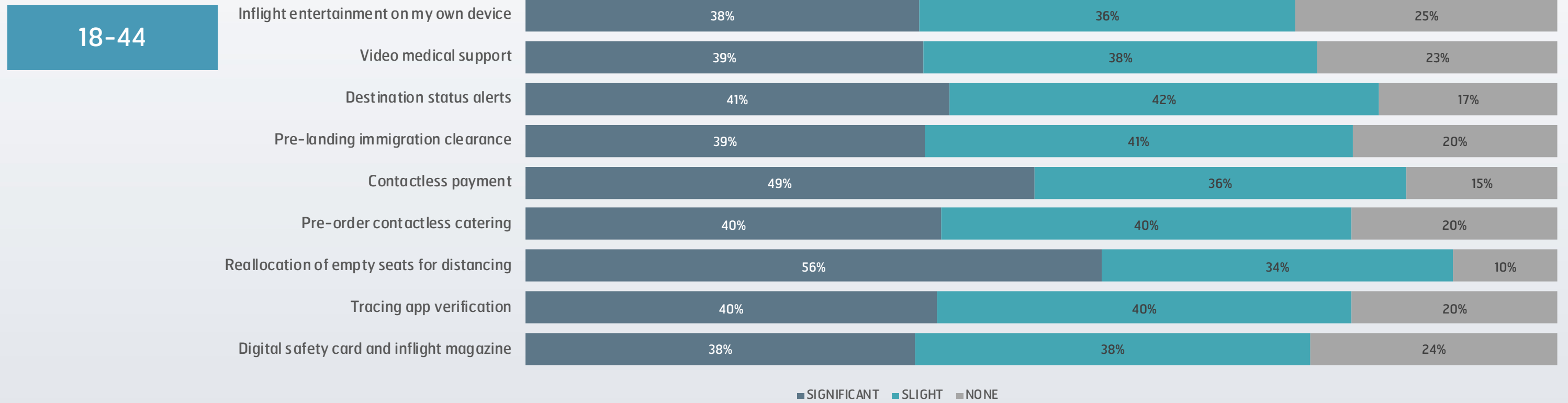
## EMEA



## AMERICAS

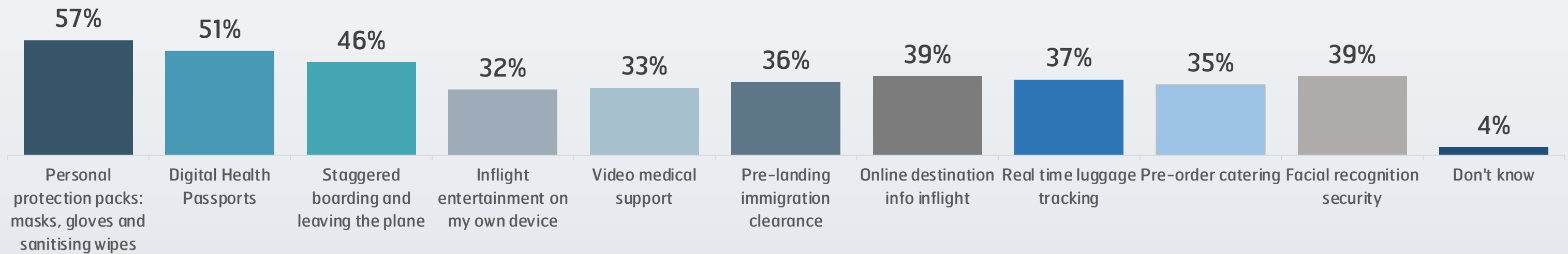


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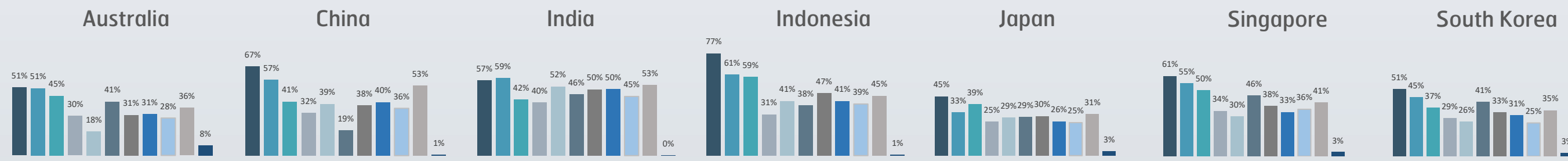


# Q14. What new aspects of the travel experience would be an improvement compared with how it was before, and should be kept even after the pandemic?

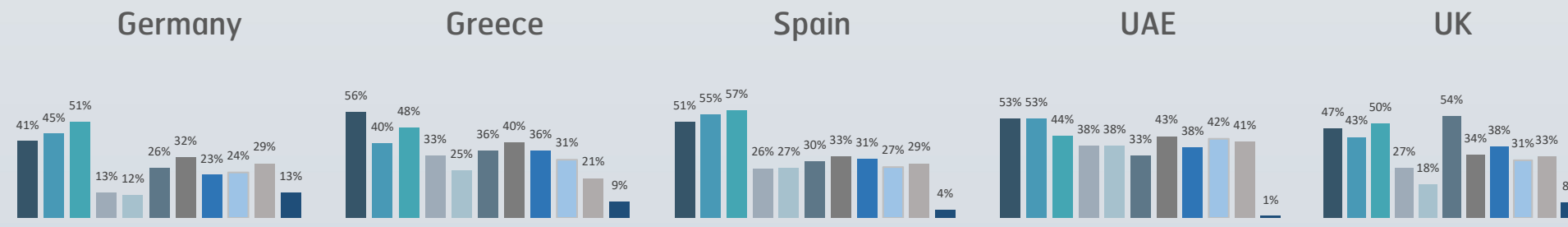
## Global



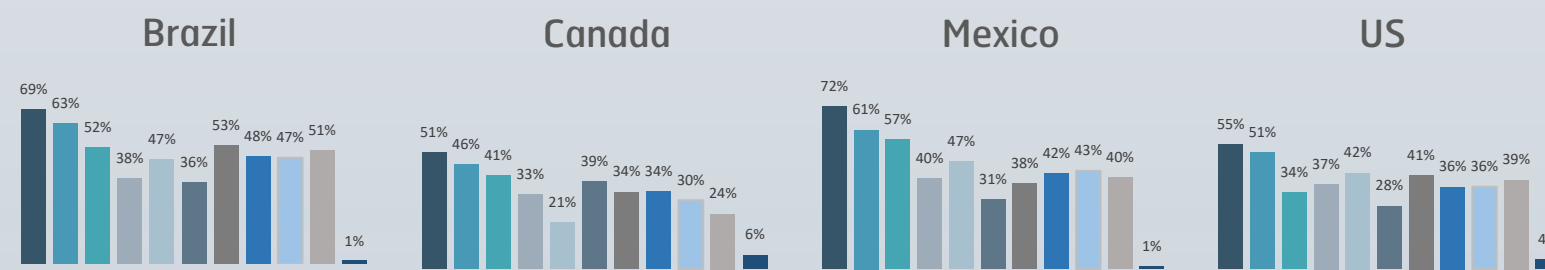
## APAC



## EMEA



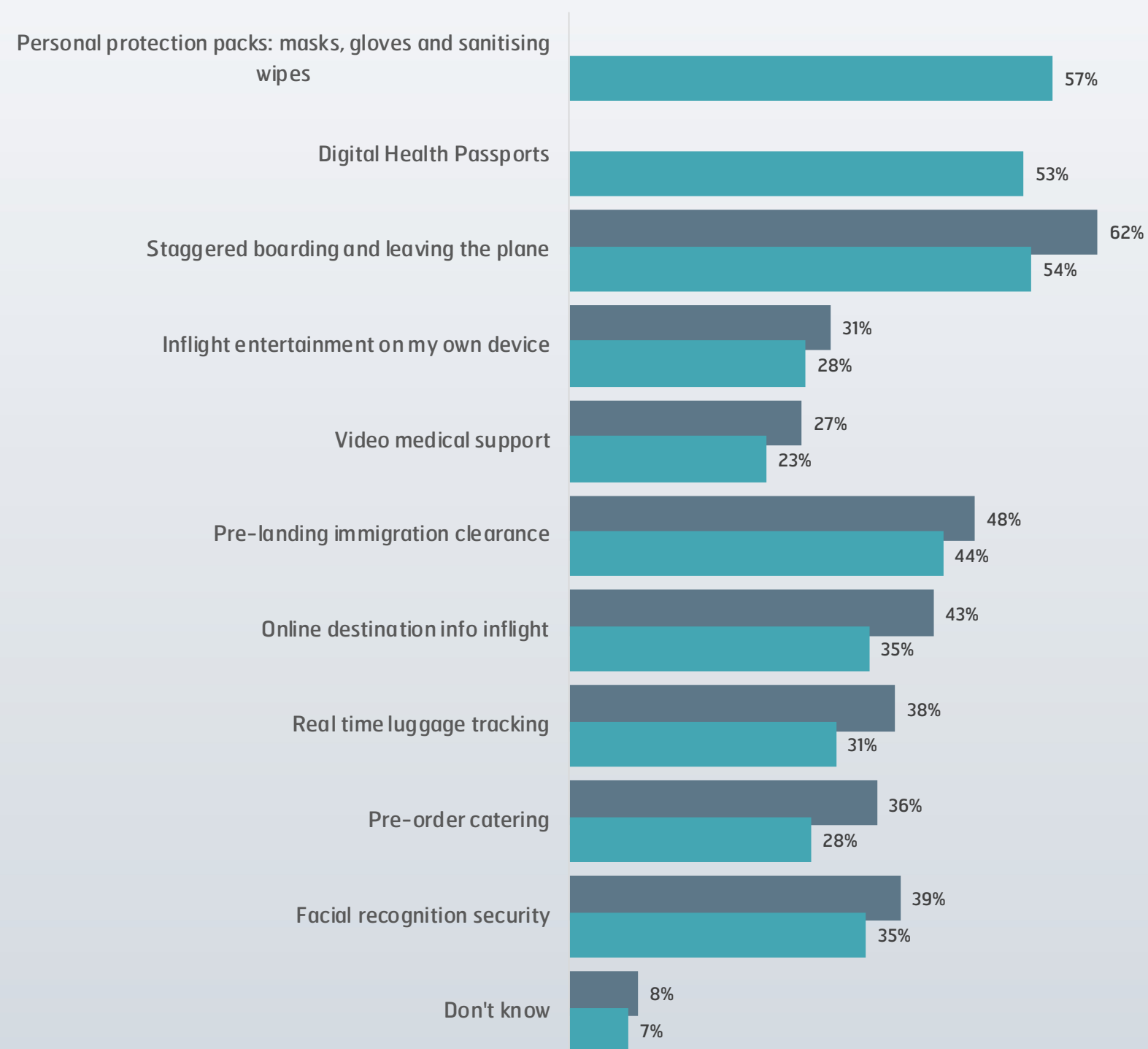
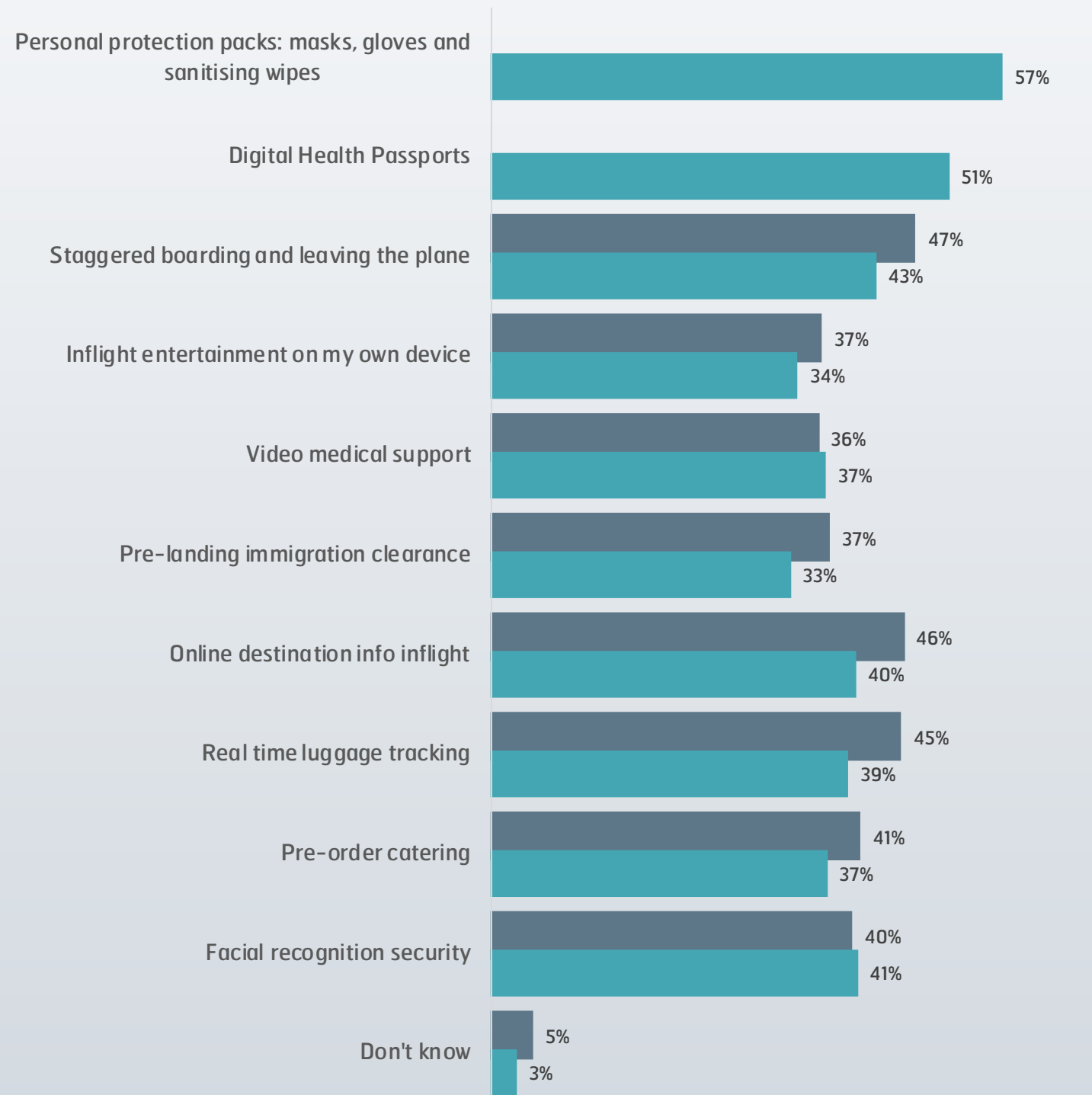
## AMERICAS



# Q14. 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?

18-44

45-65+

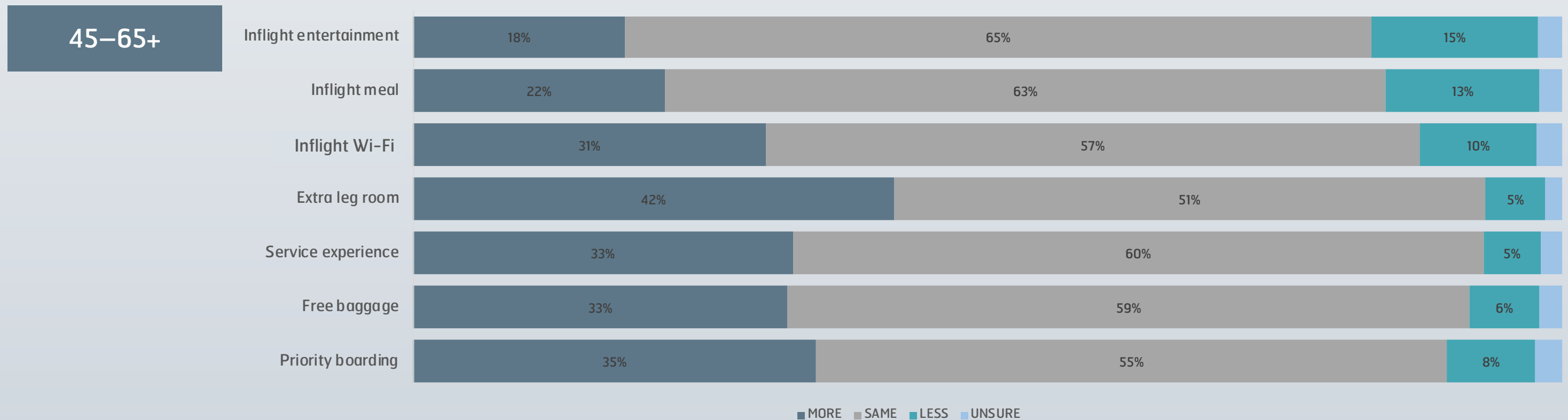
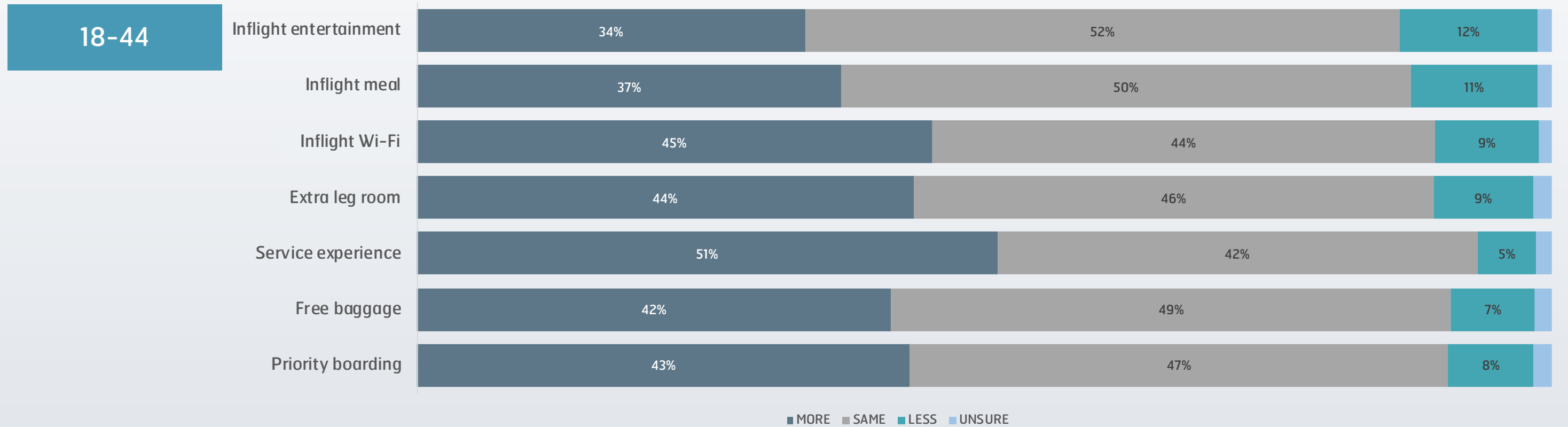


2020 2021

# Q15. Following the COVID-19 pandemic, would you say the following factors are more, less or the same importance for the enjoyment of your flight?

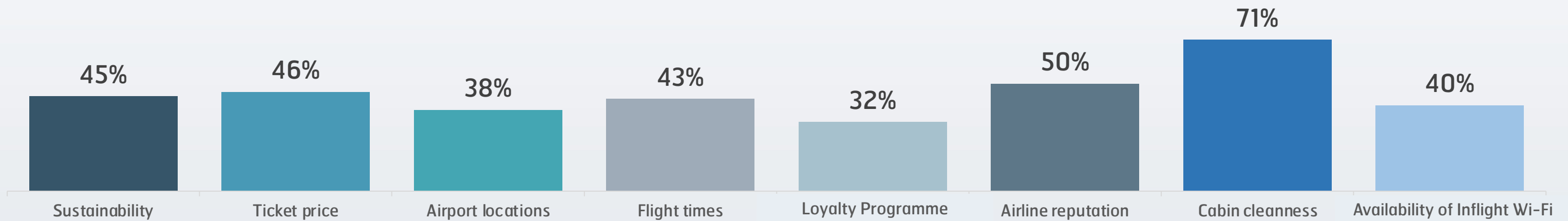


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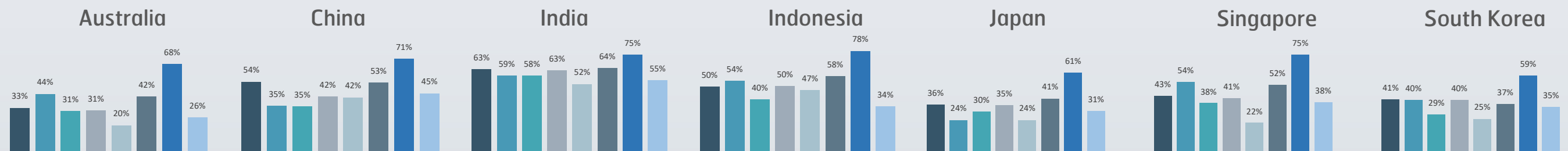


# Q16. Following the COVID-19 pandemic, would you say the following factors are more, less or the same importance for choosing an airline?

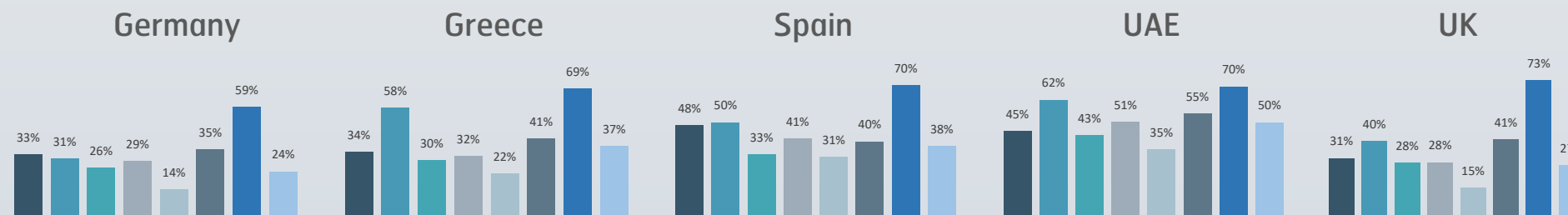
## Global



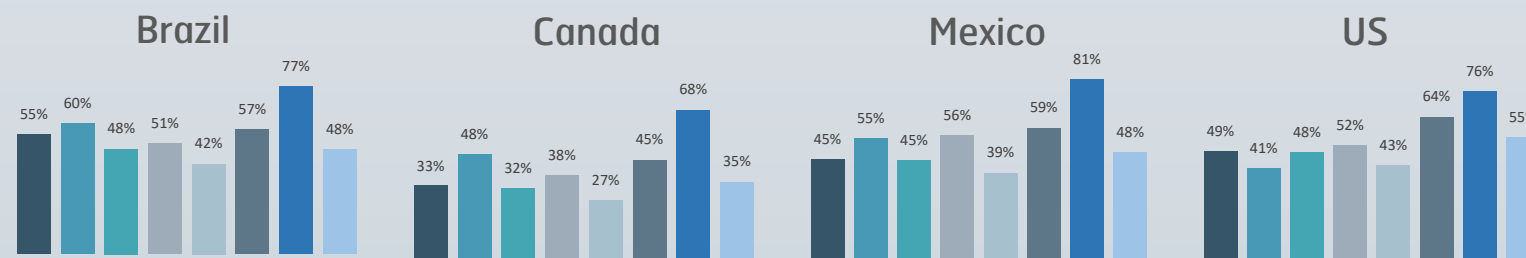
## APAC



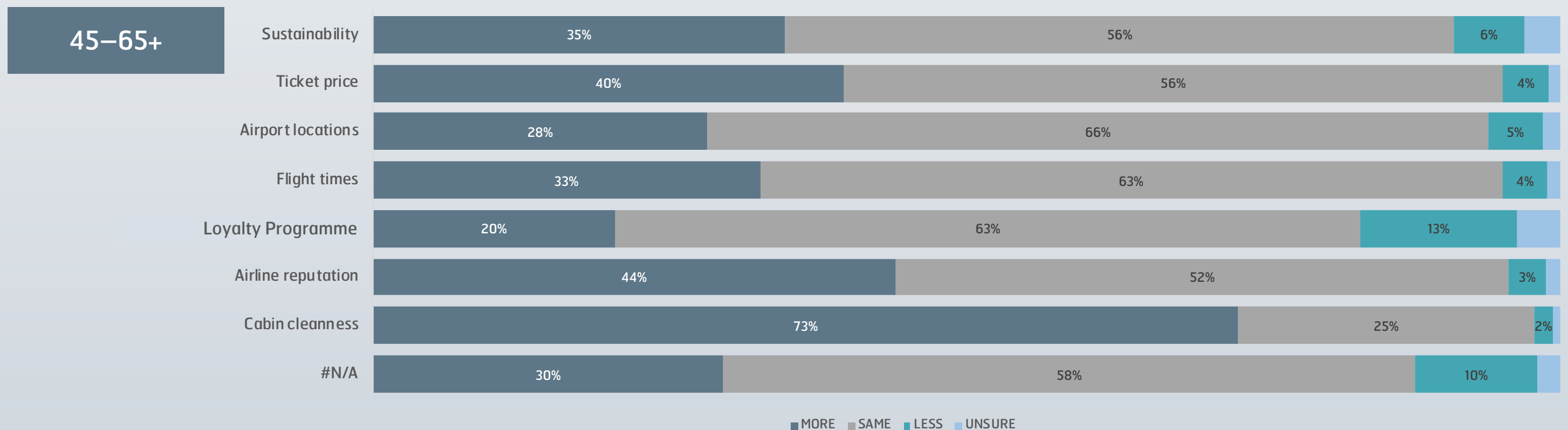
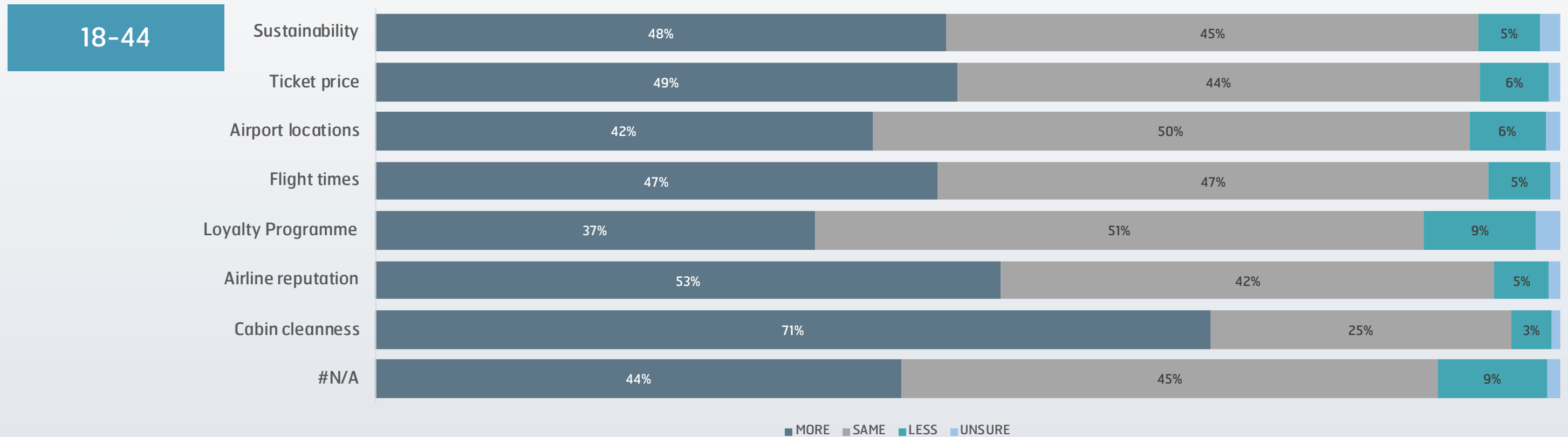
## EMEA



## AMERICAS

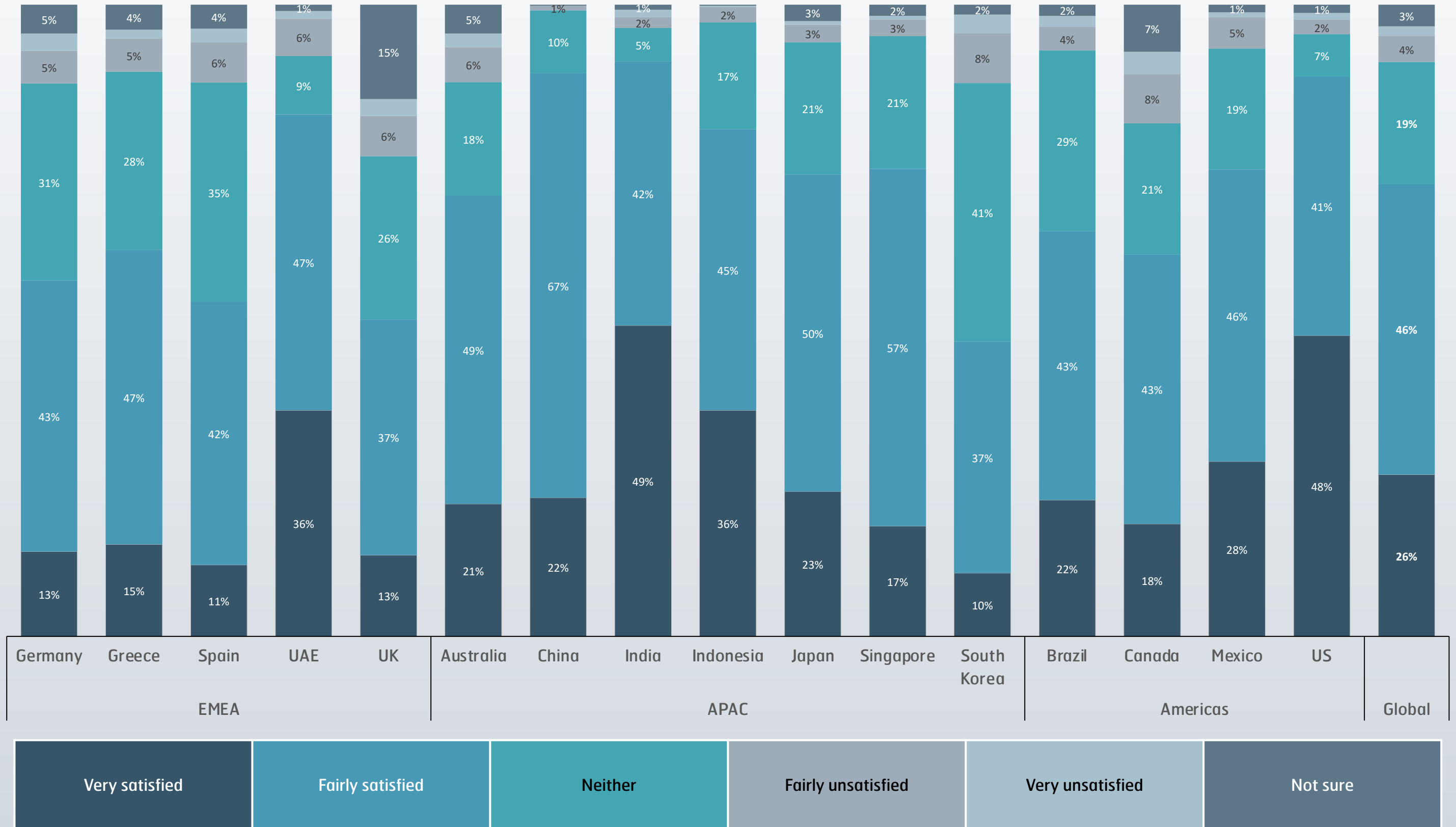


# Q16. Following the COVID-19 pandemic, would you say the following factors are more, less or the same importance for choosing an airline?



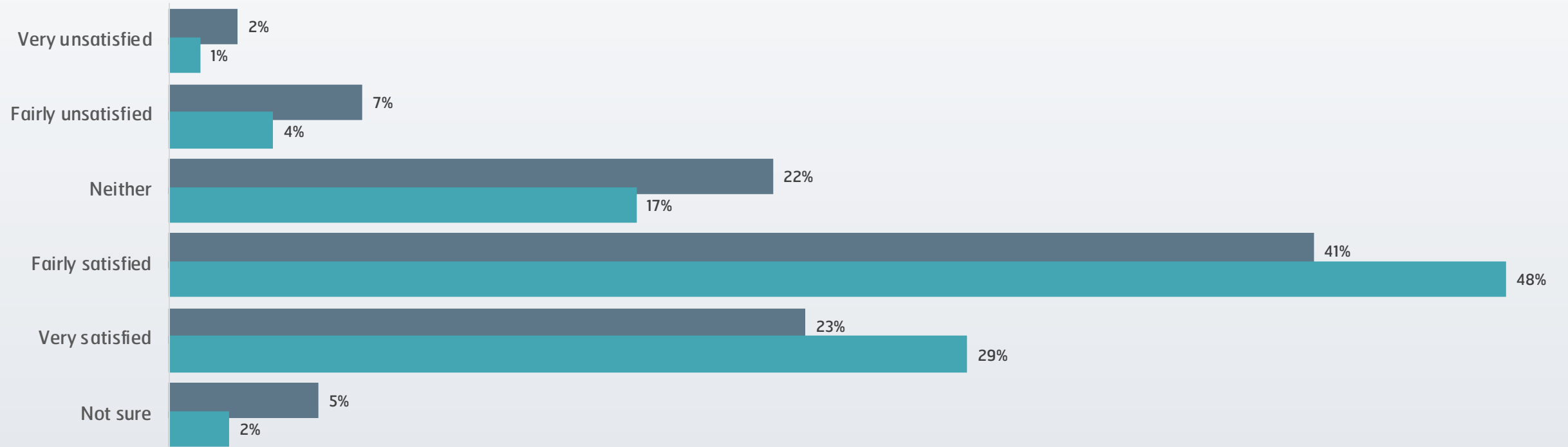


# Q17. To what extent have you been satisfied with airlines' responses to the pandemic?

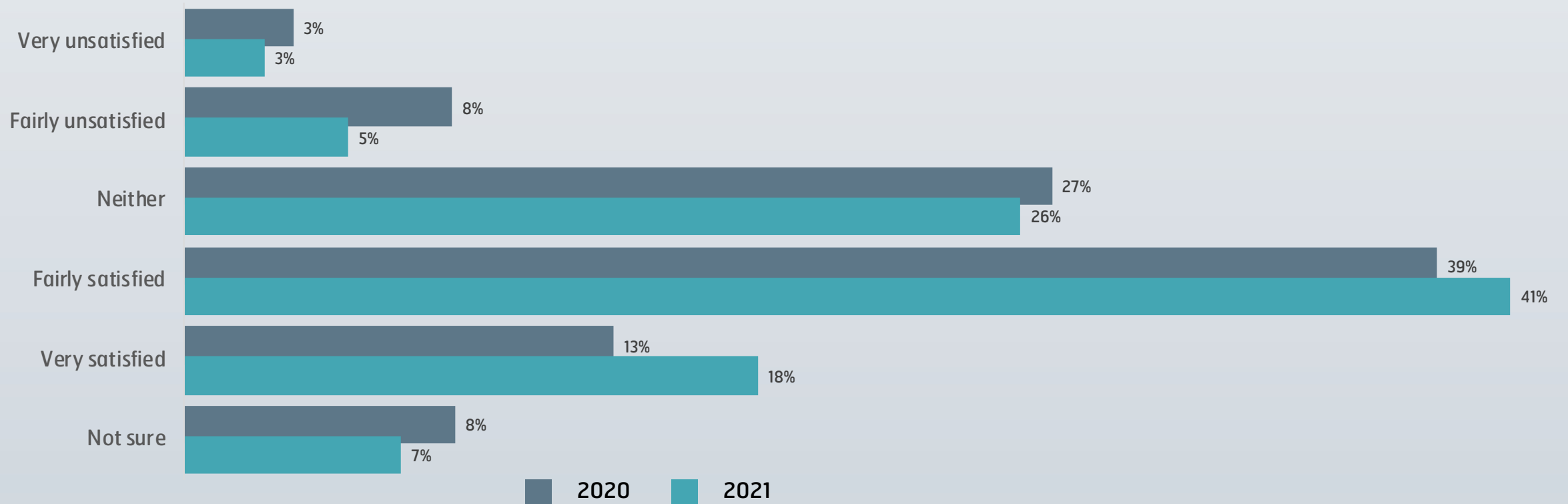


# Q17. To what extent have you been satisfied with airlines' responses to the pandemic?

18-44

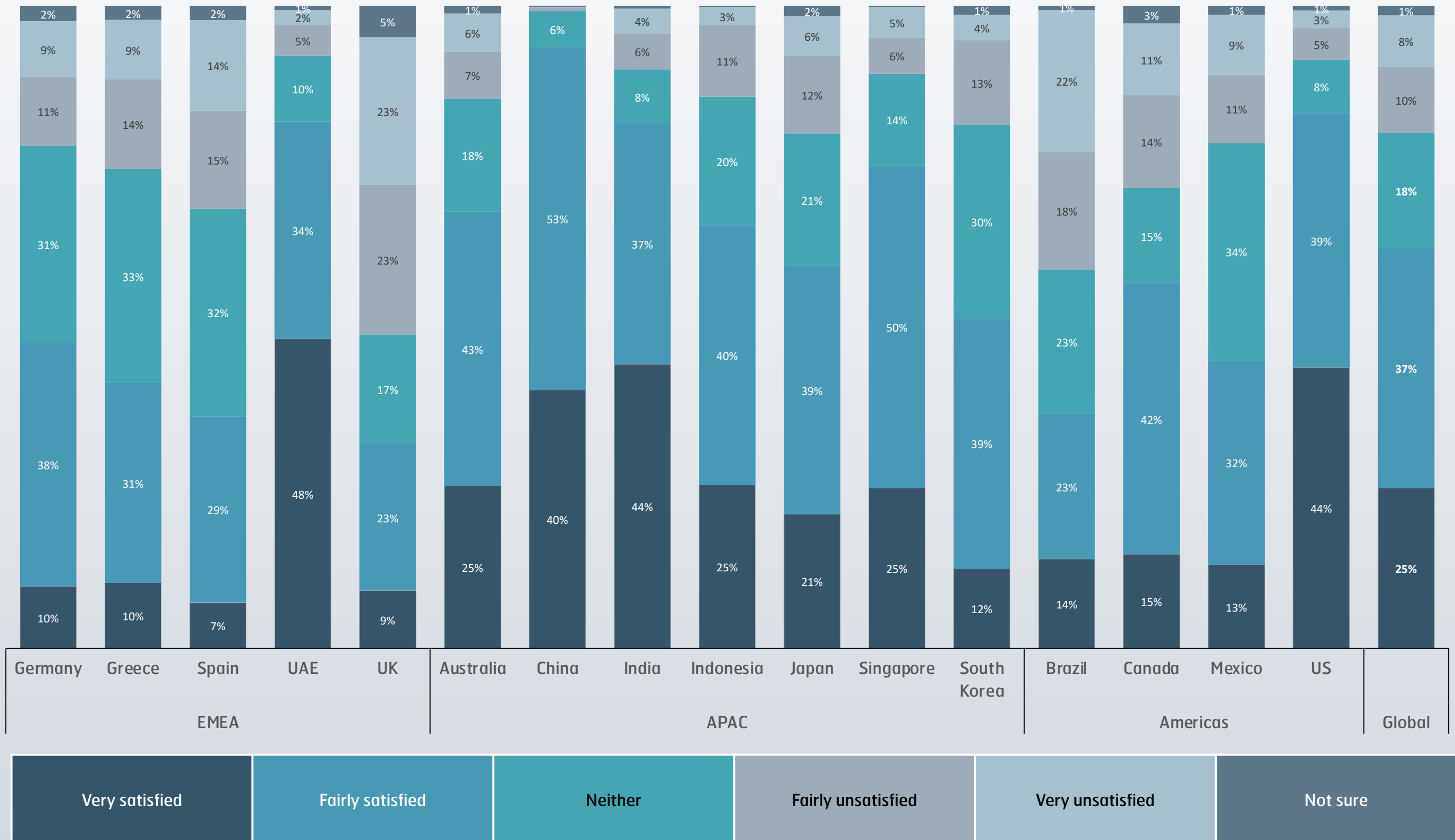


45-65+



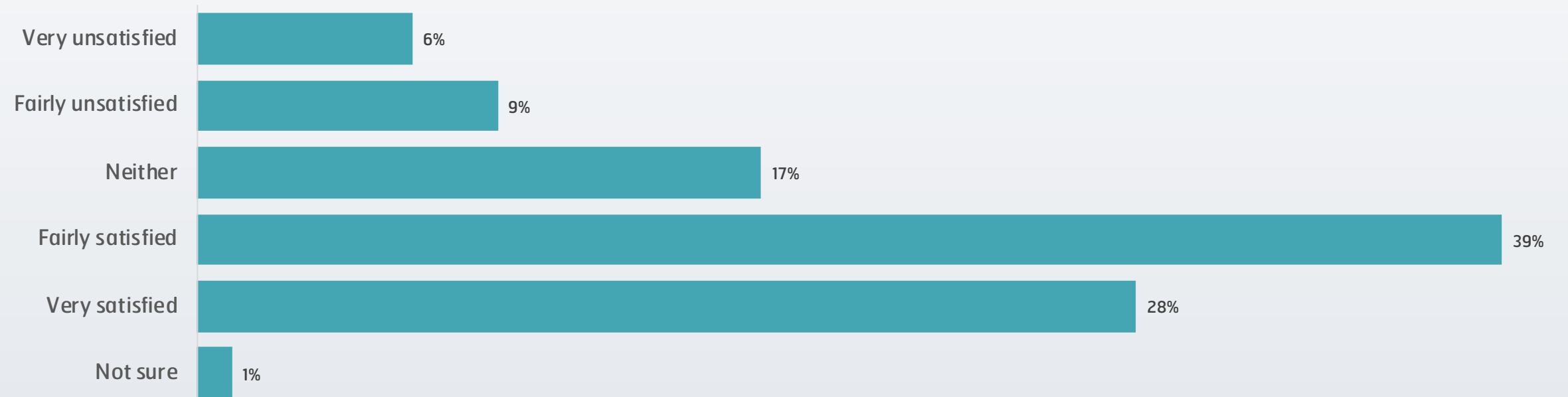
2020 2021

# Q18. To what extent have you been satisfied with governments' responses to the pandemic?

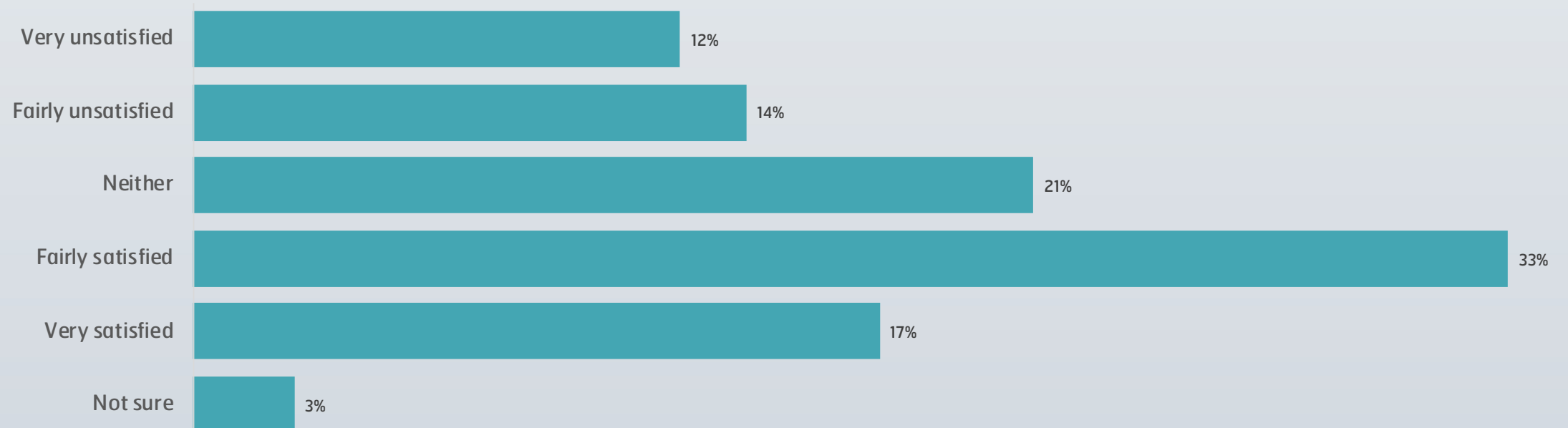


# Q18. To what extent have you been satisfied with governments' responses to the pandemic?

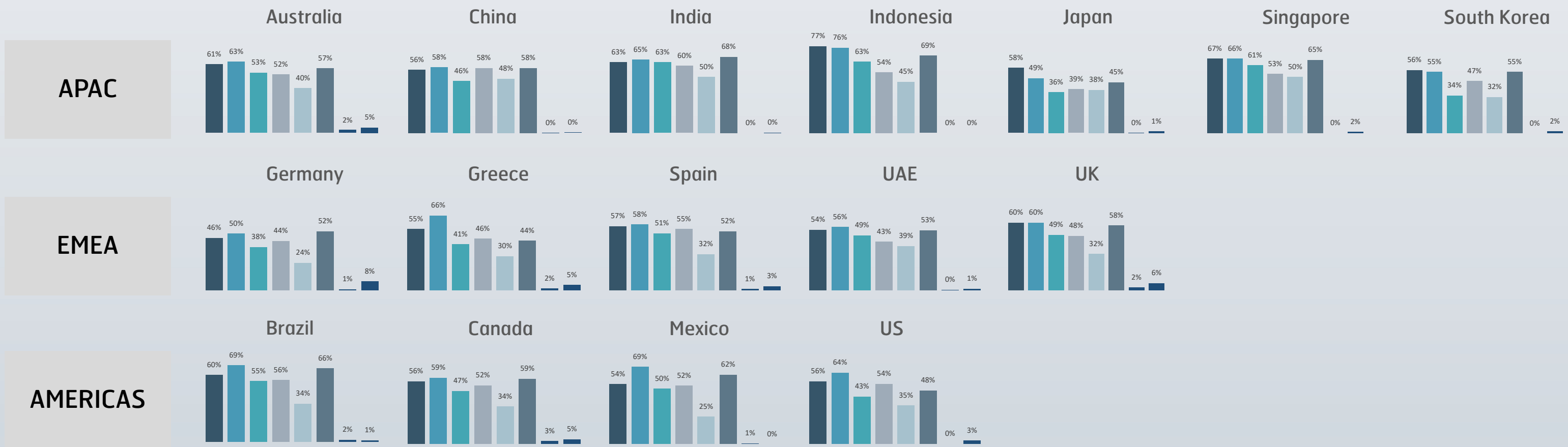
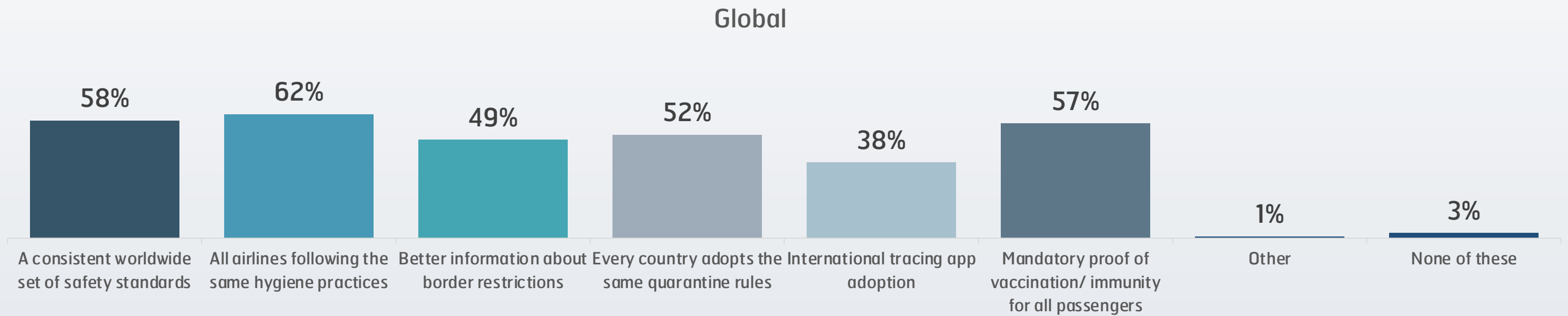
18-44



45-65+

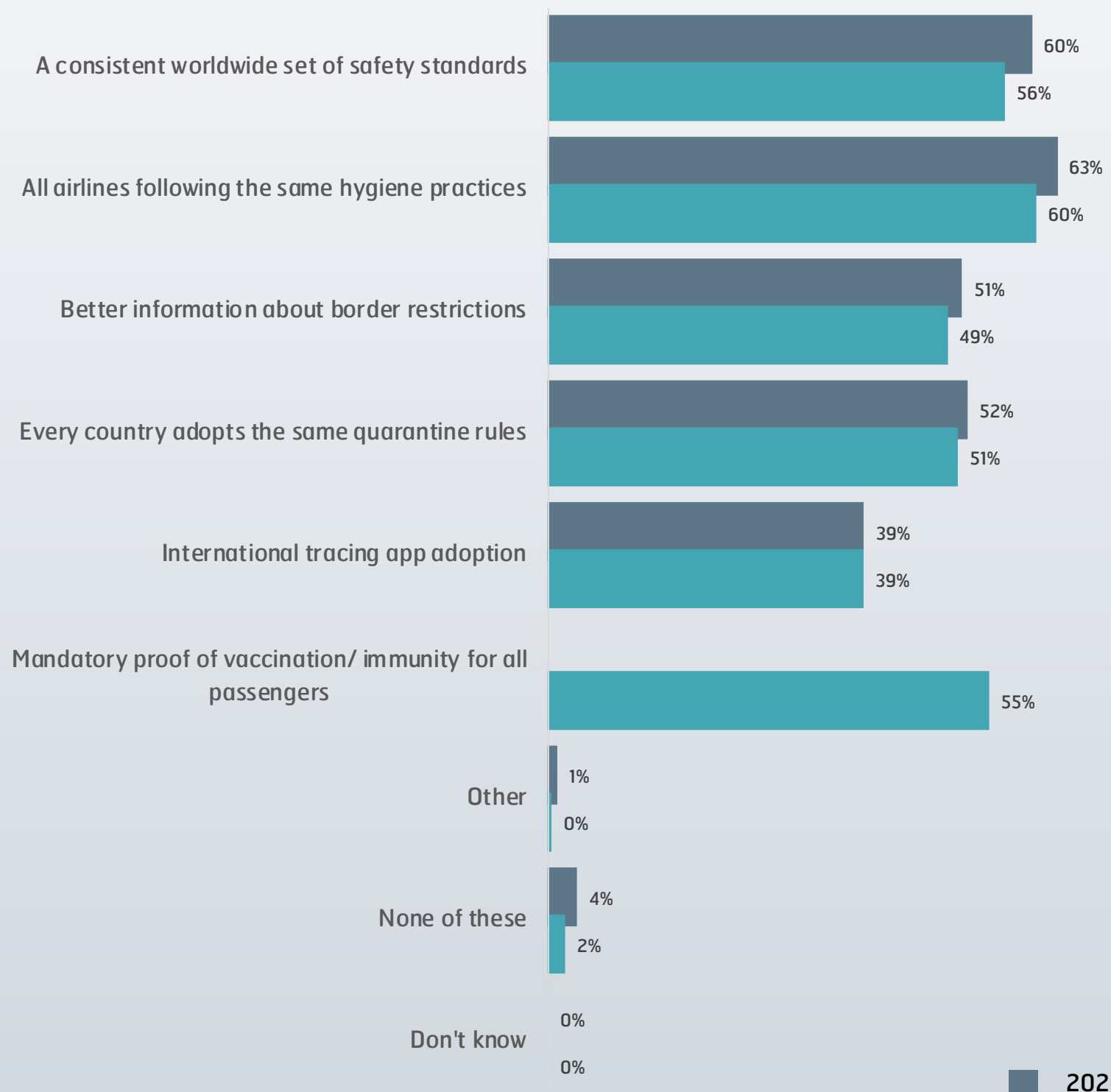


# Q19. What else could airlines and the travel industry do to make you feel more confident about flying?

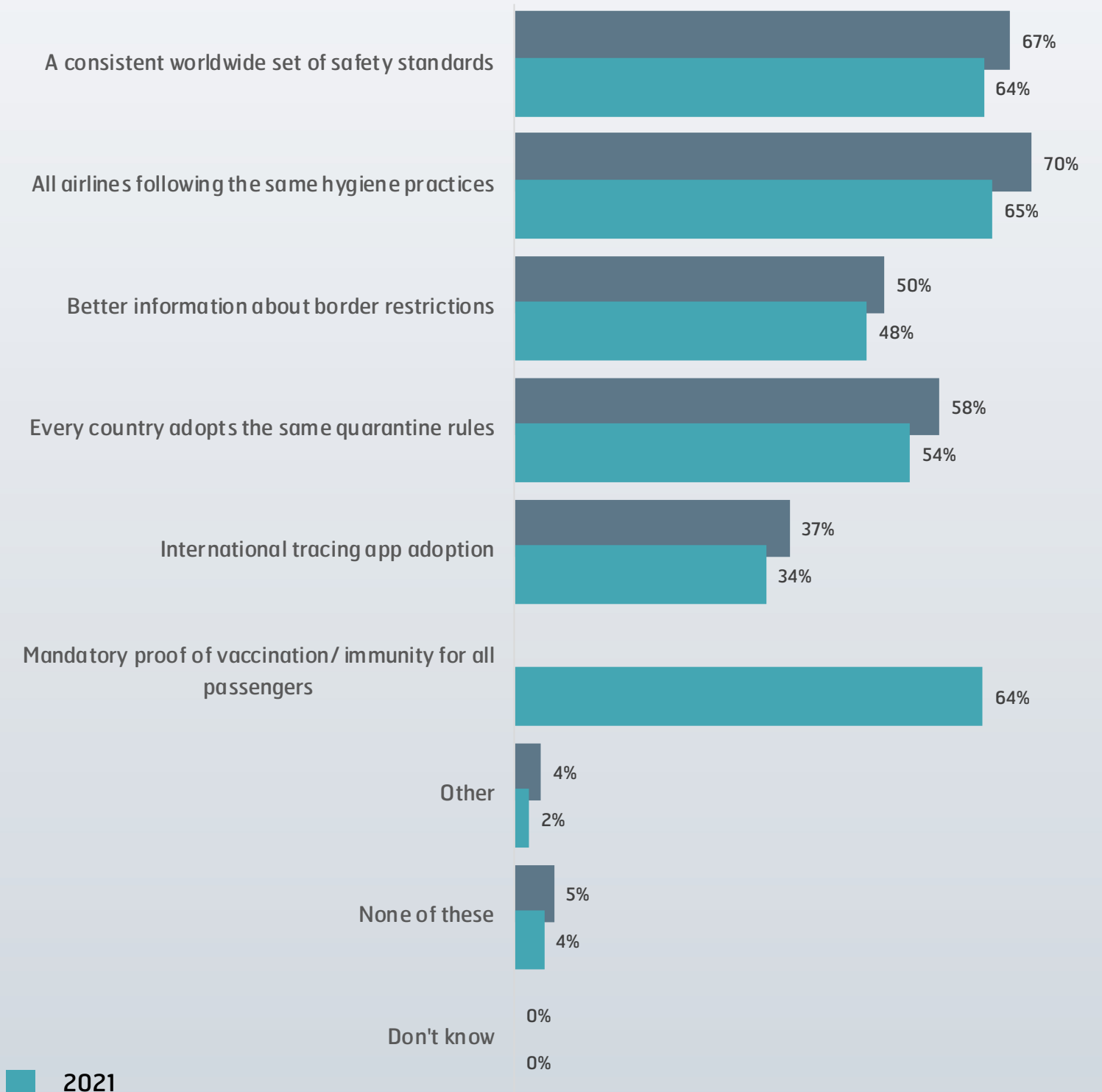


# Q19. What else could airlines and the travel industry do to make you feel more confident about flying?

18-44

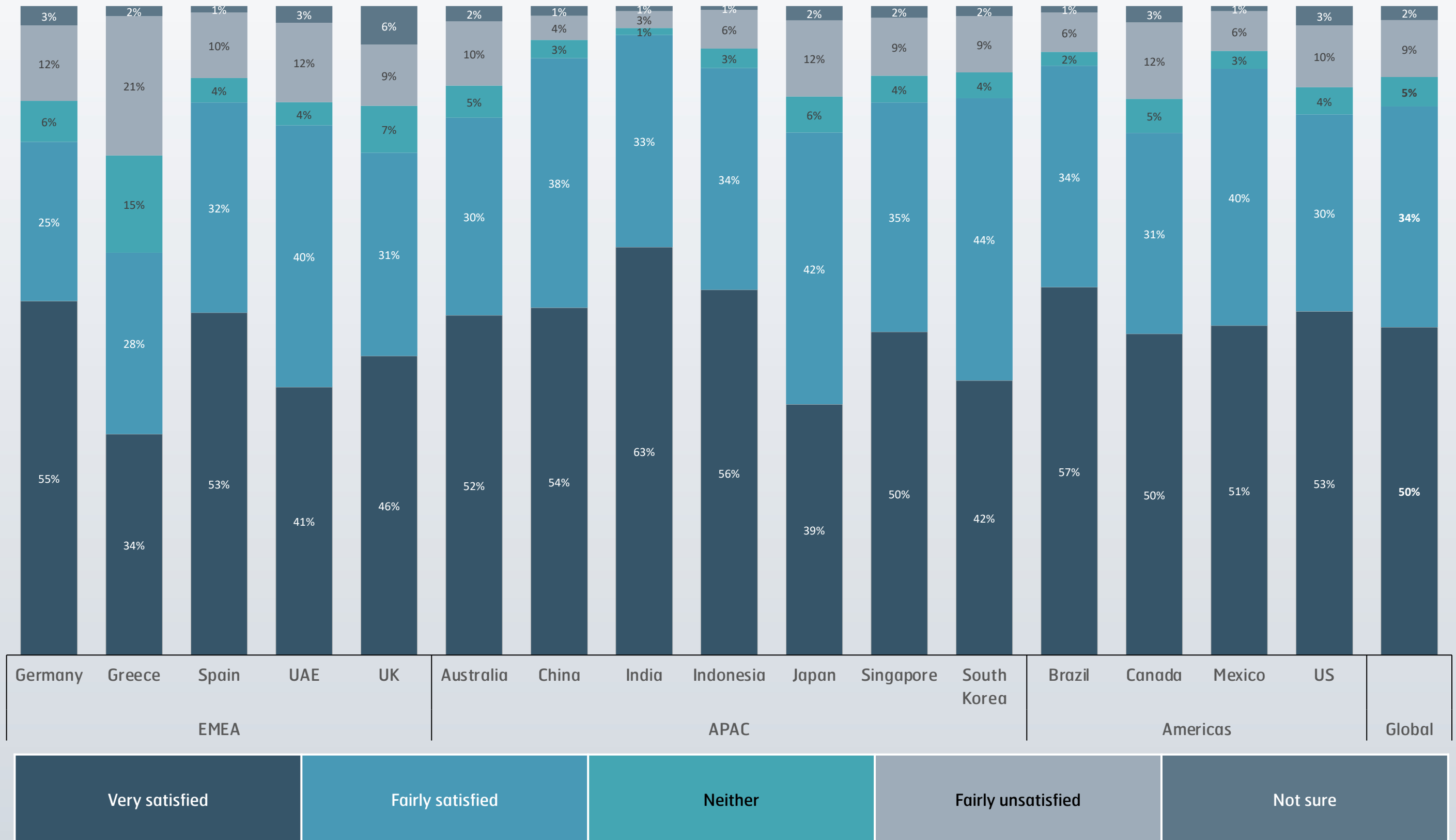


45-65+



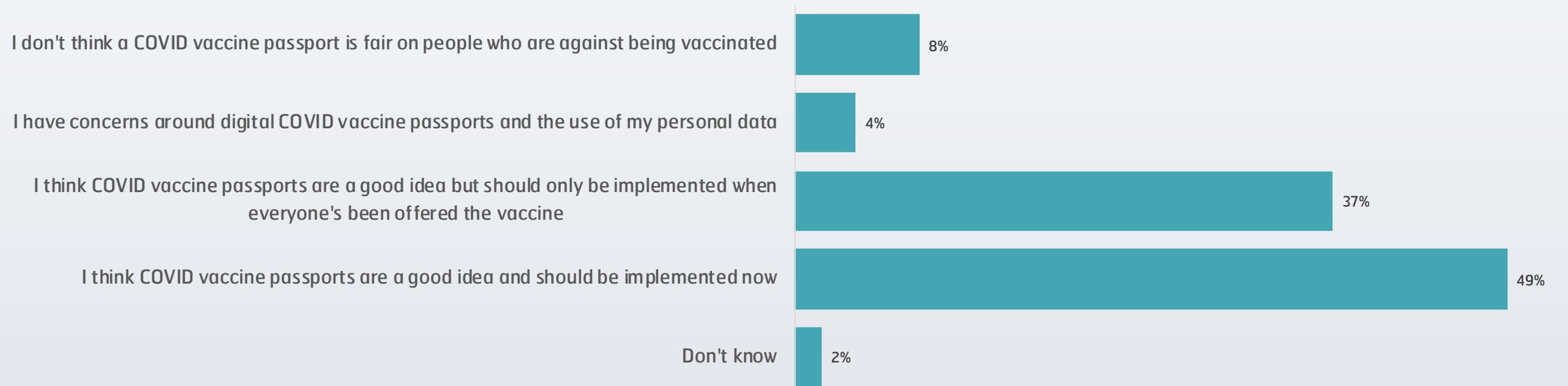
2020 2021

# Q20. Which of the following statements reflects your current attitude towards COVID vaccine passports?

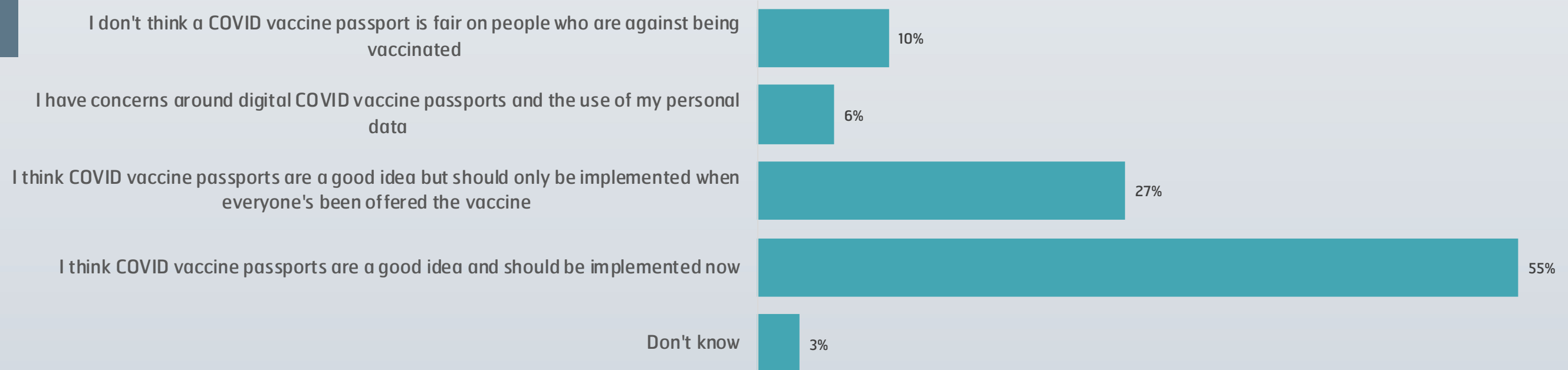


# Q20. Which of the following statements reflects your current attitude towards COVID vaccine passports?

18-44



45-65+



2021





# THANK YOU

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