

AVIATION SURVEY KEY FINDINGS

Air Service and Safety in Light of COVID-19

RESPONDENT INFORMATION

- 1,006 survey takers
- Survey was open from 8/3/20 to 8/14/20
- Strong spread across industry
- 27% of survey takers were between 36-45, 23.8% between 46-55, and 20.1% between 26-35
- 45.6% stated business as their primary reason for air travel, and 53.7% stated personal as their primary reason for air travel (0.7% said they do not use air travel)

PANDEMIC IMPACTS ON TRAVEL VOLUME

LONG-TERM: Personal travelers anticipate at higher levels than business travelers that once COVID-19 is resolved, their travel loads will return to normal.

- Of those who selected “business” as primary reason for travel, 20.6% expected COVID-19 to have a large impact by reducing the amount of air travel that their role requires in the long-term, 46.5% expected the pandemic to result in a small impact of some amount of reduced travel in their role moving forward. 25.8% expected that their travel loads will return to previous volumes once there is a vaccine or herd immunity to COVID-19.
- Of those who selected “personal” as the primary reason they travel, only 17% said that COVID-19 will have a large impact by reducing the amount that they use air travel in the long-term. 18.2% said that COVID-19 will have a small impact on how much they travel in the long-term, and 55.6% expected that they will travel the same amount that they used to once there is a vaccine or herd immunity.

SHORT-TERM: Those who travel for primarily personal reasons are returning to air travel at slightly faster rates than those who travel primarily for business purposes.

- Of those who travel primarily for business purposes, 59.1% said they have no plans to travel for the foreseeable future, and 34% said they will be traveling for business in the next 90 days or are already traveling.
- Of those who travel primarily for personal reasons, 46.7% said they have no plans for the foreseeable future, and 40% said they plan to travel in the next 90 days or are already traveling.



AIR SERVICE

Both business and personal travelers want to see flights reinstated to San Francisco (SFO) and Boston (BOS) as their respective first and second priorities. Business travelers want to see flights reinstated to New Orleans (MSY) as their third priority, and personal travelers want to see Cancun (CUN) reinstated as their third priority. Both groups want to see increased nonstop service to New York- La Guardia (LGA) and Chicago-Midway (MDW). Business travelers' top priority in terms of increased nonstop service is to Washington-National (DCA), and personal travelers' top priority is Denver, CO (DEN).

BUSINESS TRAVELERS PRIORITIZED INCREASED NONSTOP SERVICE TO:

Washington-National, DC (DCA)	34.8%
Chicago- Midway, IL (MDW)	31.3%
New York, La Guardia, NY (LGA)	30.3%
Atlanta, GA (ATL)	25.3%
Dallas-Love, TX (DAL)	24.1%

PERSONAL TRAVELERS PRIORITIZED INCREASED NONSTOP SERVICE TO:

Denver, CO (DEN)	42.2%
New York, La Guardia, NY (LGA)	33%
Chicago-Midway, IL (MDW)	28.1%
Seattle, WA (SEA)	25.3%
Los Angeles, CA (LAX)	24.4%

BUSINESS TRAVELERS PRIORITIZED THAT AIR SERVICE BE REINSTATED TO:

San Francisco, CA (SFO)	41.7%
Boston, MA (BOS)	37.7%
New Orleans, LA (MSY)	30.5%

PERSONAL TRAVELERS PRIORITIZED THAT AIR SERVICE BE REINSTATED TO:

San Francisco, CA (SFO)	46.5%
Boston, MA (BOS)	37.76%
Cancun, MX (CUN)	33.4%

(Note: New Orleans, LA (MSY) was a close fourth with 32.3%)

SENSE OF SAFETY WHILE TRAVELING THROUGH KCI

SHORT-TERM: Both business and personal travelers want to see required use of PPE for all airport users, social distancing in check-in and security lines, and increased amount of touch free technology at the current terminal in order to address their primary concerns around flying through KCI. Similarly, both business and personal travelers had the same top concerns around using the current terminal: (1) gate waiting areas, (2) boarding and deplaning the aircraft, and (3) security.

When asked what they expect to see in the current terminal in order to feel safe while traveling through KCI, business travelers prioritized:

- Required use of PPE for all airport users – 58.1%
- Social distancing in check-in lines and security lines – 54.5%
- Increased amount of touch free technology to reduce contact with doors, concessions, etc. – 50.4%

When asked what they expect to see in the current terminal in order to feel safe while traveling through KCI, personal travelers responded with the same priorities as business travelers. They prioritized:

- Required use of PPE for all airport users – 57.1%
- Social distancing in check-in lines and security lines – 52.5%
- Increased amount of touch free technology to reduce contact with doors, concessions, etc. – 43.7%

When asked what aspects of air travel bring you the most pause right now, business travelers responded

that gate waiting areas (40.5%), boarding and deplaning the aircraft (38.3%), and going through security (37.6%) created the most concern around flying. 14.5% of business travelers reported that they have no concerns about flying at this time.

When asked what aspects of air travel bring you the most pause right now, personal travelers responded

with the same concerns as business travelers. They responded that gate waiting areas (40.1%), boarding and deplaning the aircraft (39.5%), and going through security (39.3%) created the most concern around flying. 9.4% of personal travelers reported that they have no concerns about flying right now.

LONG-TERM: Both business and personal travelers want to see an air filtration system that could assist in eliminating virus/disease at the airport; increased amount of touch-free technology to reduce contact with doors, concessions, etc.; and increased cleaning of facilities as a new standard going forward in order to feel safe in the future terminal.

When asked what business travelers expect to see in the future terminal (set to open in Spring 2023) in light of COVID-19 in order to feel safe, they responded:

an air filtration system that could assist in eliminating virus/disease at the airport (52.1%); increased amount of touch-free technology to reduce contact with doors, concessions, etc. (46%); and increased cleaning of facilities as a new standard going forward (35.6%). 35% of business travelers selected that they anticipate feeling safe in the new terminal, and did not select any additional options.

When asked what personal travelers expect to see in the future terminal (set to open in Spring 2023) in light of COVID-19 in order to feel safe, they responded:

an air filtration system that could assist in eliminating virus/disease at the airport (54.7%); increased amount of touch-free technology to reduce contact with doors, concessions, etc. (45.7%); and increased cleaning of facilities as a new standard going forward (36.8%). 28.6% of personal travelers selected that they anticipate feeling safe in the new terminal, and did not select any additional options.

