

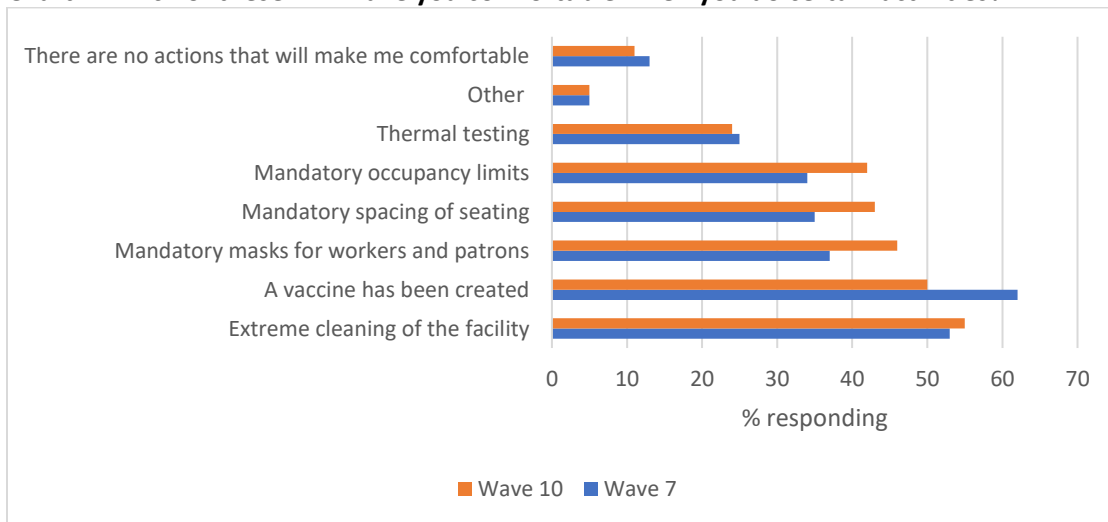
Further interesting behavioural perspectives

In our note published on 6th May 2020 we said that we would continue to review the behavioural survey data and report on anything that we considered to be interesting. Overnight we have seen the latest results from the “Harris COVID-19 Tracker Poll”.

Whilst it seems that a few more respondents are now missing flying on an aircraft more than they do going to the gym, and there are also the inevitable consequences of timing effects as we move closer to the end of lock downs, bringing forward the restart of particular activities compared to earlier rounds of questioning, there are, in the latest publication, some questions that have been revisited after a gap as well as some new ones. We have presented each of these, paraphrasing where necessary, and the responses in chart form; We believe that they all have an important bearing on some of the measures that are currently being suggested to restart aviation and travel.

Chart 1 shows that three weeks ago over 60% of the respondents suggested that a vaccine was necessary before they would contemplate, amongst other activities, flying – however given the lag between a vaccine being developed and indeed a large percentage of any population being vaccinated, it is perhaps important that other actions are now seen by an increasing number of respondents as necessary, if not sufficient, conditions for activities to restart.

Chart 1 Which of these will make you comfortable when you do certain activities?

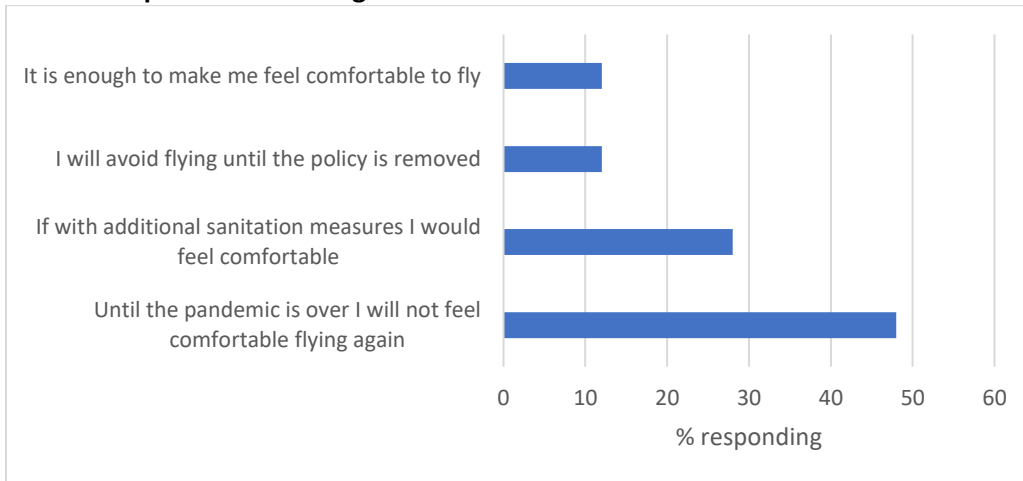


Source: The Harris Poll COVID-19 tracker

One solution that has already been implemented by some airlines and appears likely to be mandated, as a necessary condition to allow travel by any form of public transport and not just on aircraft, is the wearing of a face mask. One of the new questions in the most recent survey asks for responses should this become the case for flying. Here the results are again interesting; just 12% see that a mask (alone) would give them sufficient comfort but where in conjunction with the increased cleaning and sanitation measures, that many airlines have already introduced, the

figure rises to 40%. However this means that 60% do not consider a mask, even when combined with “additional sanitation”, will give them sufficient comfort to fly.

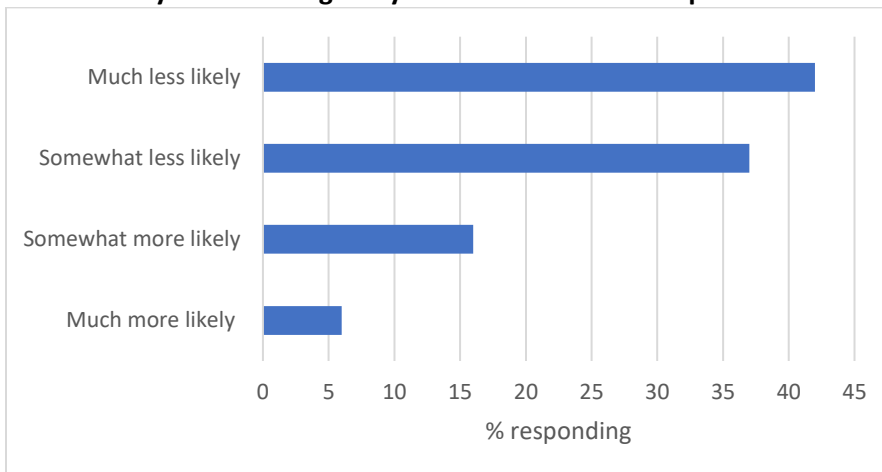
Chart 2 Responses to wearing a face mask



Source: The Harris Poll COVID-19 tracker

There has also been considerable discussion around the additional time that may be required to be allowed for check in to enable medical and other screening to take place at the airport. The conclusion is clear where almost 80% of the respondents state that they would be “*somewhat or much less likely to book*” if that turns out to be the case – something that also relates to the number who now would consider driving long distances rather than flying.

Chart 3 Will you book a flight if you need to be at the airport 4 hours before departure?



Source: The Harris Poll COVID-19 tracker

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