

# **Proposed US-Imposed Airplane Electronics Ban**

## **Travel Manager Survey**

**79% indicate reduced travel to the US, to Europe and through European hubs should an electronics ban be instituted**

**Half say travel demand will fall more than 25%**

**Business Travel Coalition**

**May 22, 2017**

# Travel Manager Survey

Business Travel Coalition (BTC) released the results of a four-day survey of 112 corporate, university and government travel managers regarding a potential US-imposed inflight electronics ban from European airports. Travel managers from the UK, Spain, US, Germany, Ireland, Finland, Belgium and France participated in the survey.

“These survey results should illuminate the economic risk of such a ban on electronics that are larger than a cell phone and encourage the US Department of Homeland Security (DHS) to collaborate with travel industry stakeholders to identify, test and deploy risk mitigation solutions short of a ban on laptops and tablets,” said BTC Founder Kevin Mitchell. “What’s more, the electronics ban from Middle East and North African airports – some of the most secure in the world – needs to be modified and consistent with all airports with departing flights to the US,” added Mitchell.

“As Reuters reported today, ‘Venezuela possesses 5,000 Russian-made MANPADS surface-to-air weapons... the largest known stockpile in Latin America and a source of concern for U.S. officials amid the country’s mounting turmoil.’ These weapons pose a serious threat to commercial aircraft and are available on the black market all over the world. By logical extension - from the current and proposed electronics bans - if DHS does not take risk management seriously, will we then have to stop flying,” asked Mitchell?

## **SURVEY RESULTS**

- 40.0 percent of respondents’ travel policies allow laptops to be checked and stored in a commercial airplane’s hold; 60.0 percent prohibit this practice.
- A minority, or 16.7 percent of those organizations that prohibit checking laptops, indicate that they would consider changing their policy should the ban go into effect; 25.0 percent say no; and 58.3 percent are unsure if a policy change would be considered.
- A super majority, or 83.0 percent, indicate that the biggest impact to productivity would be if travelers were unable to have access to their laptops during a multi-day business trip to the US, EU or elsewhere; a minority, or 12.5 percent, were concerned about lost productivity during a flight. 4.0 percent were unsure where the biggest impact would be.
- A super majority, or 85.0 percent of those organizations that prohibit checking laptops, indicate that they have not considered or implemented workaround solutions for their travelers who would potentially be without access to their laptops during a business trip. 15.0 percent say they have considered different solutions.
- A super majority, or 79.0 percent, indicates that their travelers are likely to reduce travel to the US, to Europe and through European hubs to points East and West, should such a ban be instituted.
- Over a potential 12 months of such an electronics ban, 50.0 percent of respondents expect that their travel will fall off more than 25.0 percent; 12.5 percent indicate travel will decline 11 to 15 percent; 20.8 percent think there will be a 6 to 10 percent decline; 12.5 percent indicate a decline of under 5 percent; and 4.0 percent do not envision a decline at all.

# Travel Manager Survey

## SURVEY RESULTS (Cont.)

- Should the ban go into effect, 62.4 percent of travelers who currently connect in Europe to points East and West would be very likely (41.6) or somewhat likely (20.8) to seek alternative airlines/routings to reach their destinations. (8.3 unsure, 16.7 somewhat unlikely, 12.5 very unlikely)
- Assuming a ban's implementation, 50.0 percent of travelers would be very likely (25.0) or somewhat likely (25.0) likely switch back to more time-efficient transit over Gulf hubs. (29.0 unsure, 8.0 somewhat unlikely, 12.5 very unlikely)
- Assuming a ban, 66.6 percent of survey participants indicate that their organizations would be very likely (37.5) or somewhat likely (29.1) to make more use of video conferencing and other advanced communications technologies to work with customers, prospective customers, suppliers and non-HQ staff. (20.8 unsure, 4.1 somewhat unlikely, 8.3 very unlikely)

## REPRESENTATIVE COMMENTS FROM SURVEY PARTICIPANTS

- If the restriction makes travelers safe and reduces the likelihood of a catastrophic terrorist event we will support any inconvenience.
- I understand the precaution. Banning electronics, not just laptops, but cameras, external drives, Bluetooth devices and even phones will have a large negative impact to the consumer market. Also, most companies cannot afford to provide separate workstations in other countries and some countries do not support or allow a lot of cloud services, which most corporations avoid for security reasons. Here's a positive idea. Like TSA pre-check, why not have a similar system for business and creative professionals. If a person is TSA-approved, and registered as a professional in need of specific electronics, then it should be less likely that person would be someone that would cause harm. The truth is, if someone wants to do harm, they will always find a way regardless of all the limitations and bans put in place. You will most likely create an atmosphere of fear and paranoia versus one of safety and security.

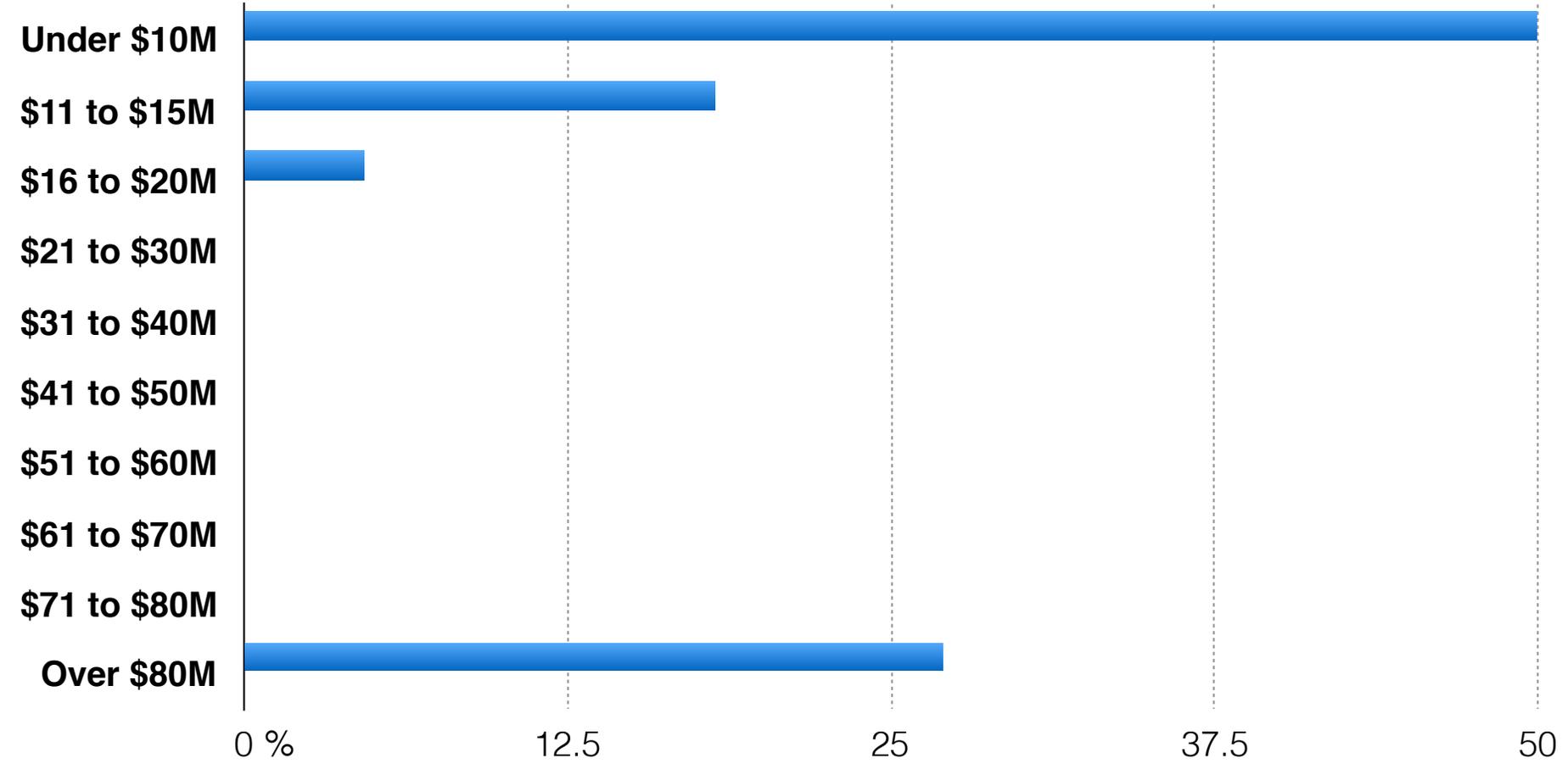
- This ban is terrible for businesses worldwide and should not be implemented. Are we not smarter with regard to defense? Won't this hurt US businesses?
- The ban would be dramatic for both business and leisure travelers, and be considered a very heavily hostile action against travellers. We expect bankruptcies in travel organizations due to this implementation.
- This would impact the economy on a global basis.
- British airline pilots have already commented on the potential safety hazard of checking laptops [and other electronics] into the hold, instead of carriage in the cabin - a device catching fire in the cabin can be contained quickly; combusting in the hold might go unnoticed until it's too late. Meanwhile, what is the point of sophisticated security scanning of electronic devices, at reputable airports, if they are still considered a risk?
- Why not simply utilize bomb-sniffing dogs, or allow laptops for known travelers who have been vetted for Global Entry, Nexus or TSA PreCheck?

## SURVEY METHODOLOGY

This survey was conducted online by Business Travel Coalition May 19, 2017 to May 22, 2017 and is based on responses from 112 frontline travel industry participants who are representative members of the Business Travel Coalition's worldwide industry panel.

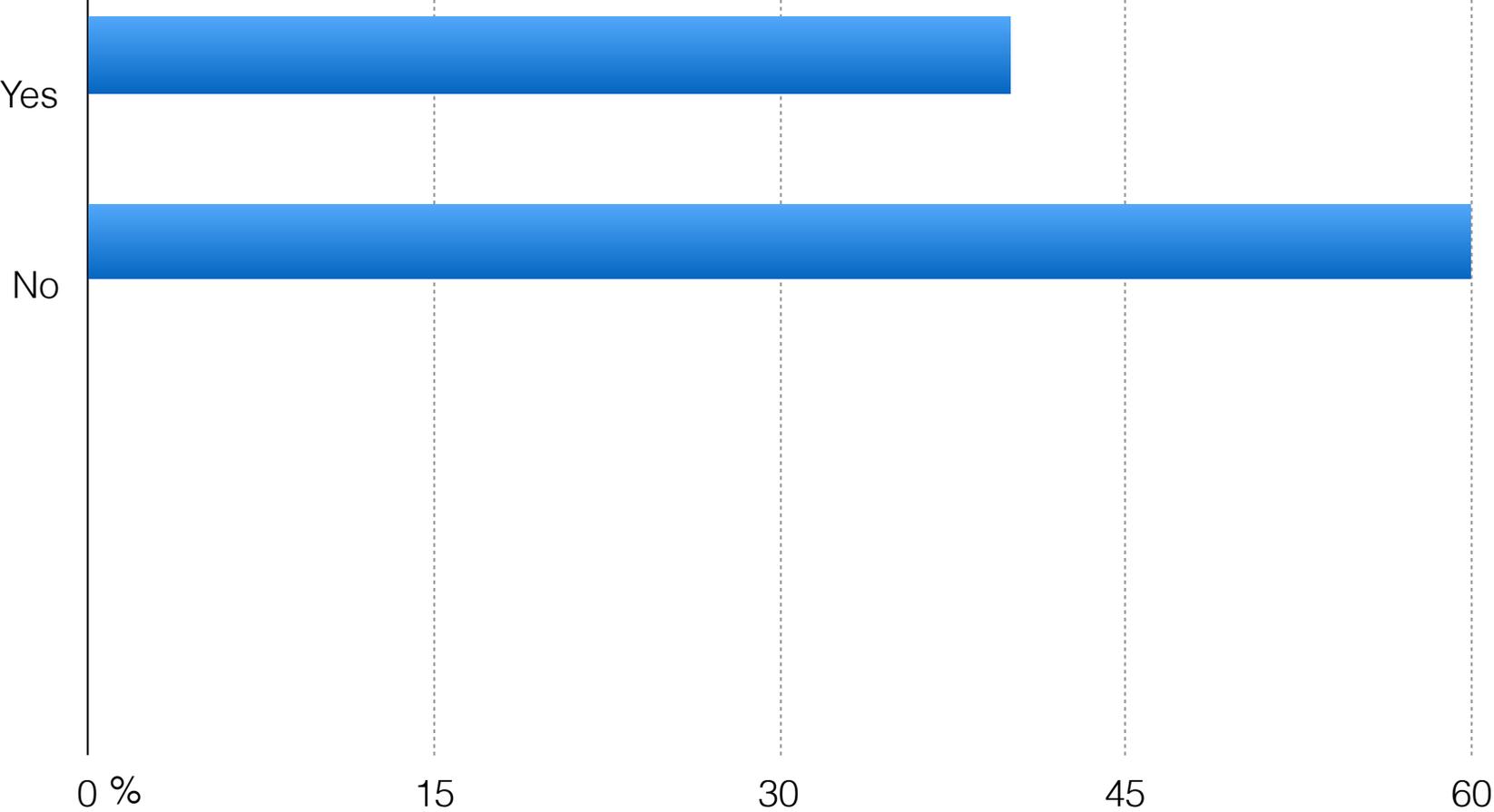
# Total Annual Travel & Entertainment Spend (USD)?

Answered: 112 Skipped: 0



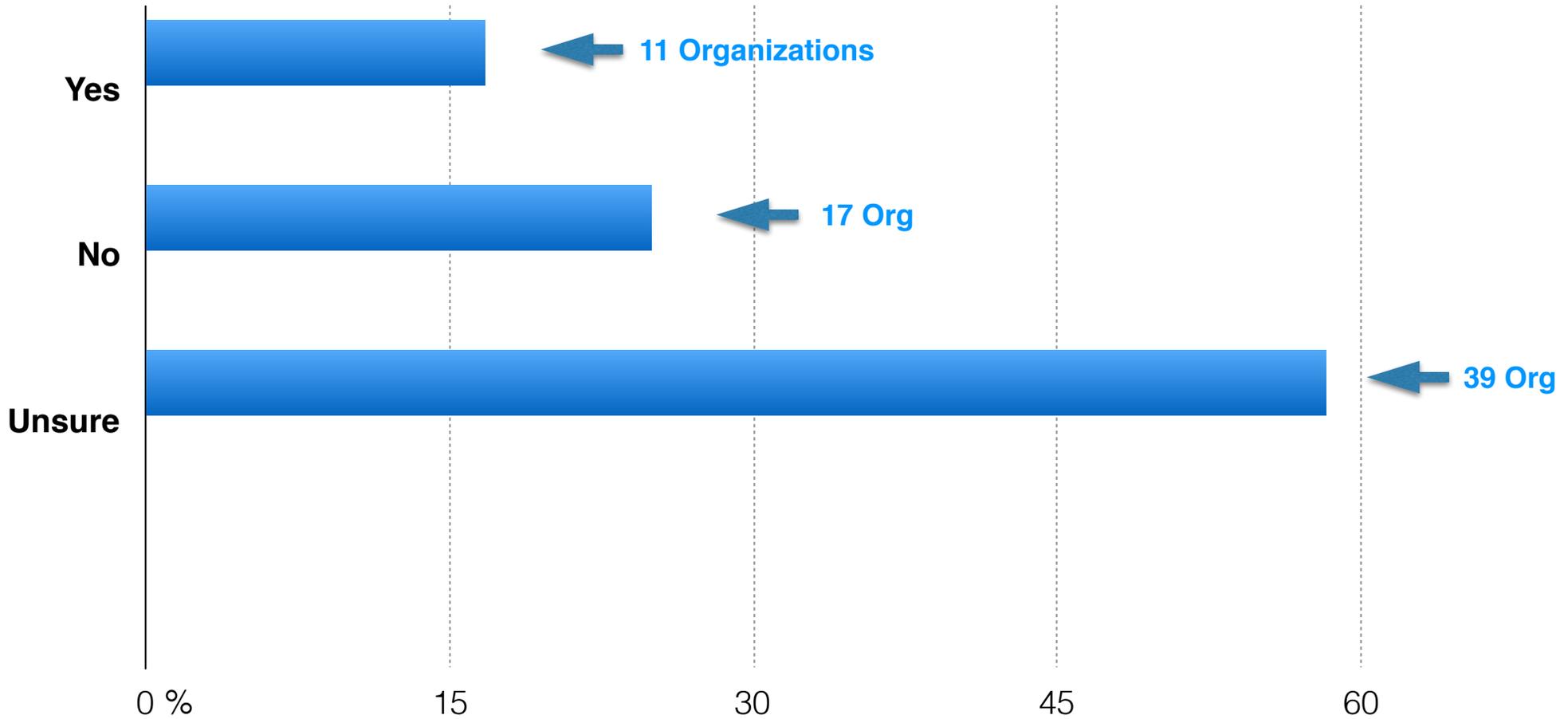
# Does your travel policy allow laptops to be checked and stored in a commercial airplane's hold?

Answered: 112 Skipped: 0



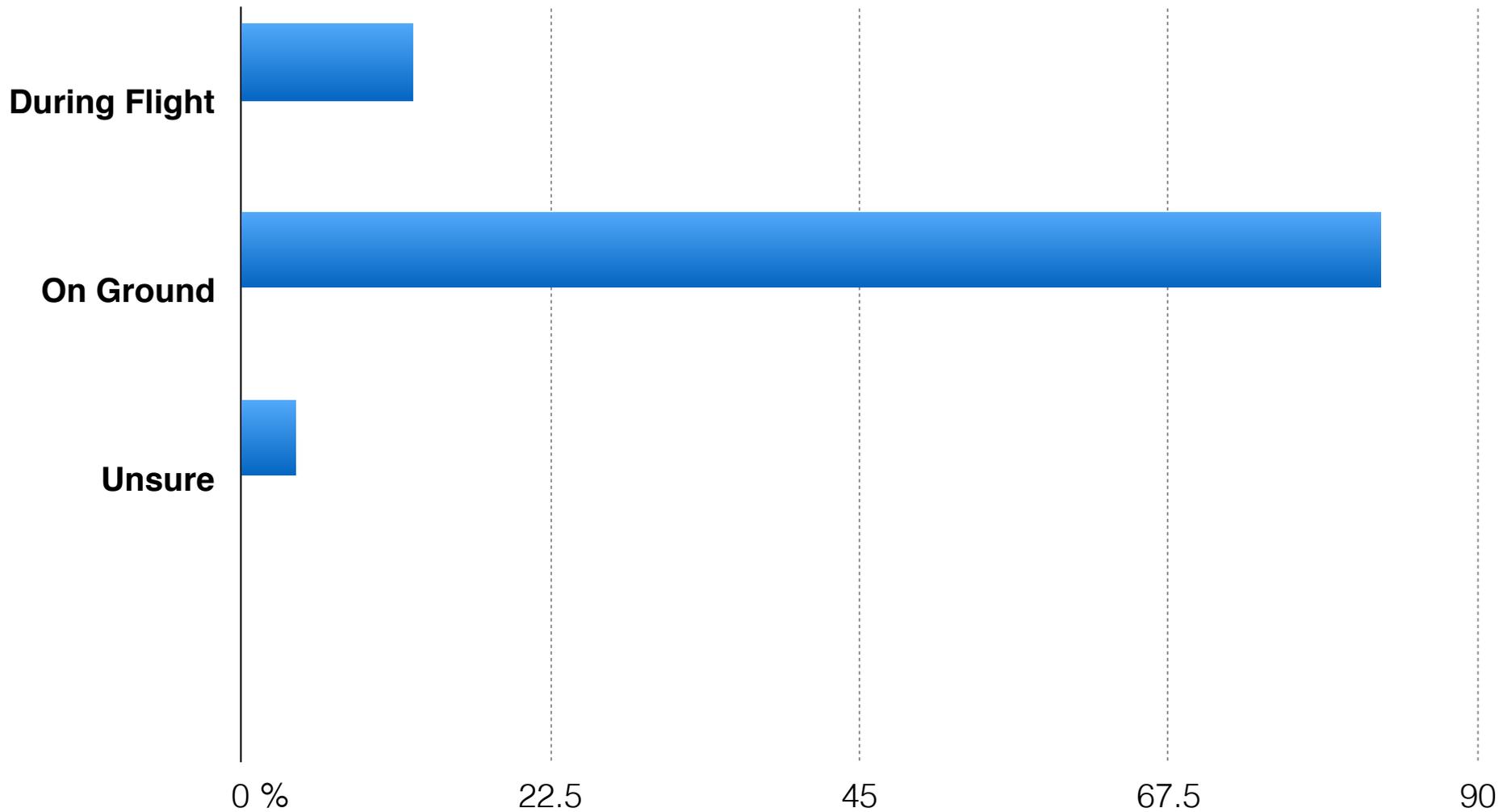
**If **NO**, is your organization considering changing policy should the current U.S. electronics ban be extended to European airports that your employees travel to, from or through?**

Answered: 67 Skipped: 45

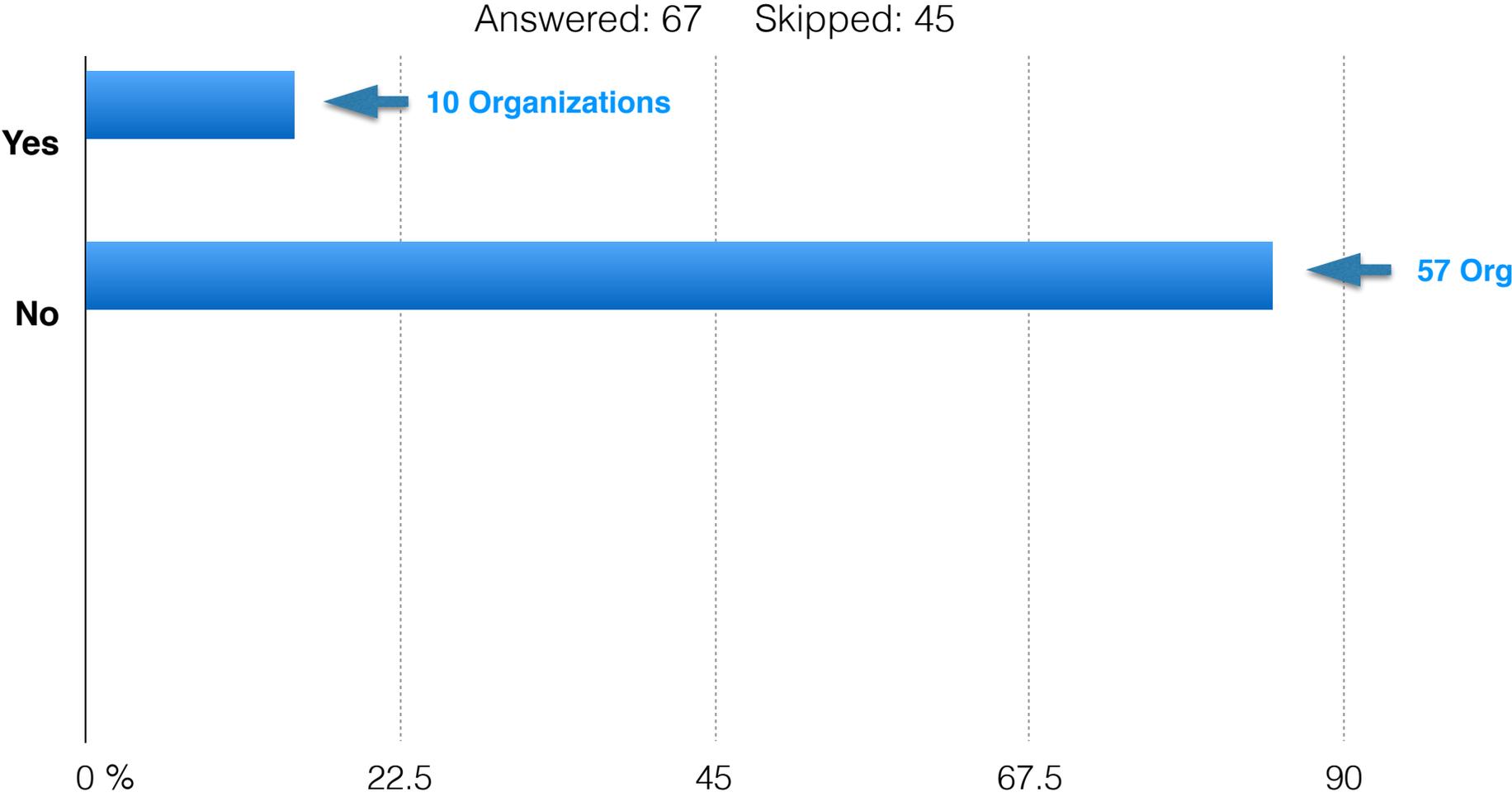


**Which is the larger problem for your travelers (and organization), loss of productivity during flight without a laptop/tablet or being on the ground in the US, EU or elsewhere for a week without one's laptop due to a potential ban and a travel policy prohibiting checking it?**

Answered: 112 Skipped: 0

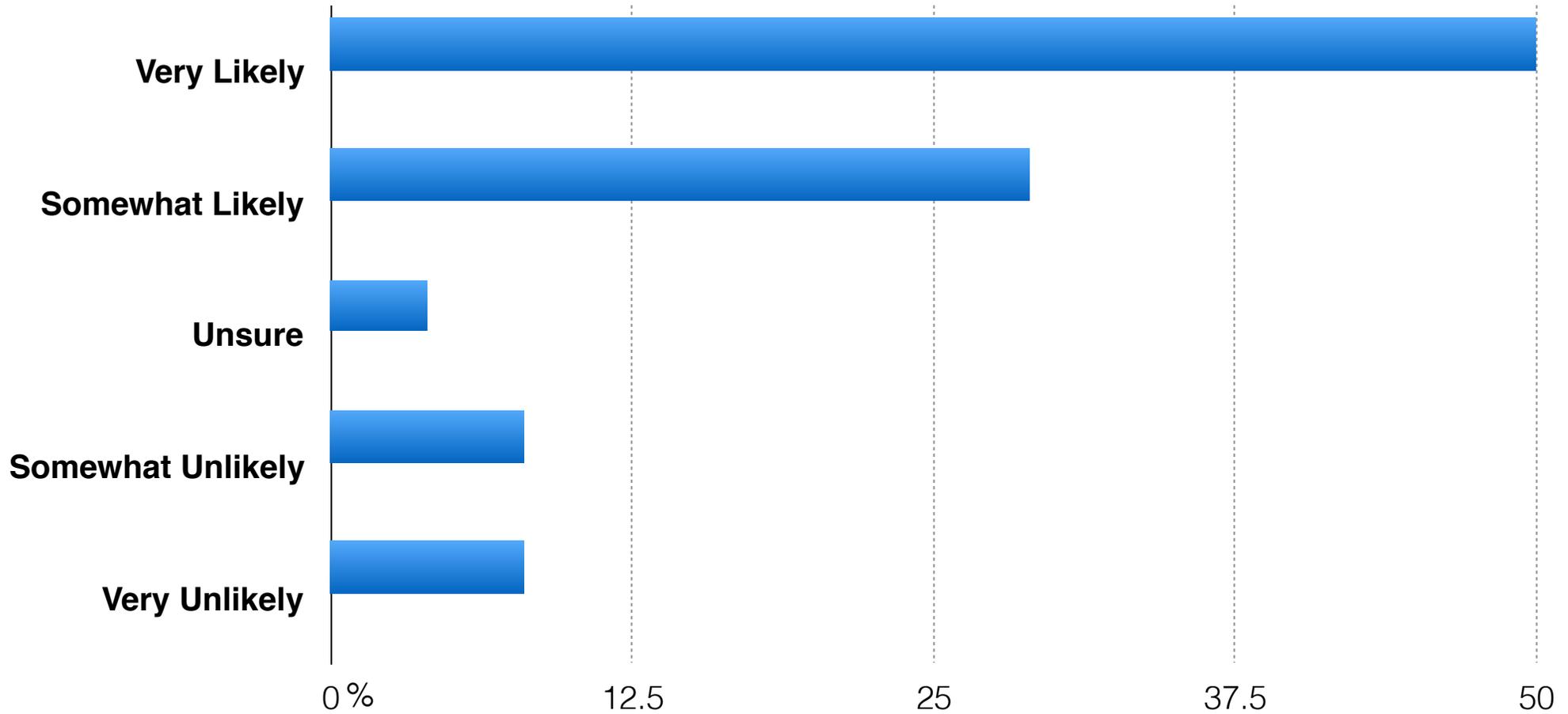


**If your organization prohibits checking laptops, have you considered or adopted workaround solutions for travelers without access to laptops during the entire duration of multi-day business trips whether they are U.S. travelers to Europe or beyond destinations, European travelers to the U.S., or other travelers transiting European hubs en route to the U.S.?**



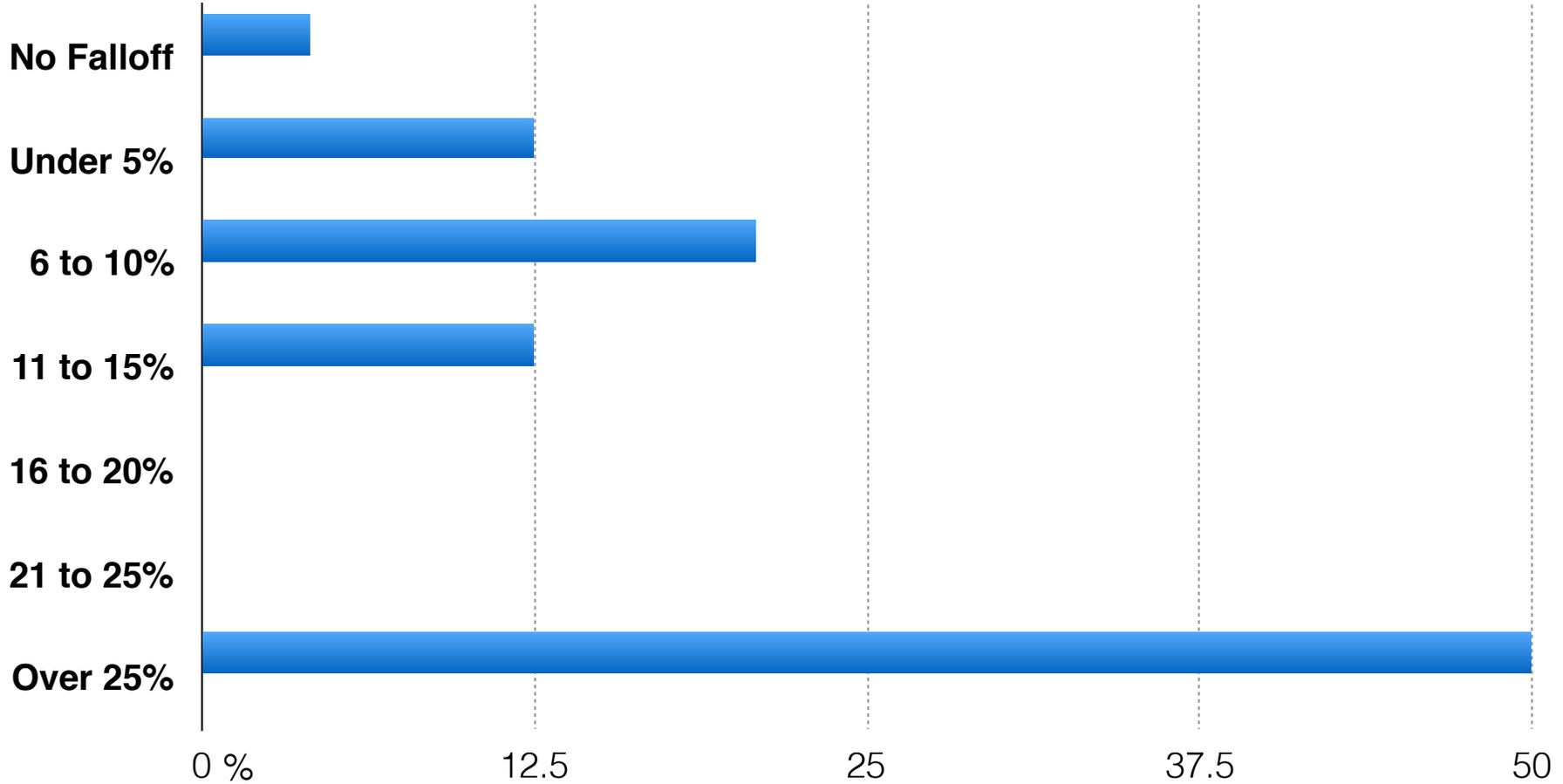
# Are your travelers likely to reduce travel to the U.S., to Europe and through European hubs to points East and West, if such a ban is instituted?

Answered: 112 Skipped: 0



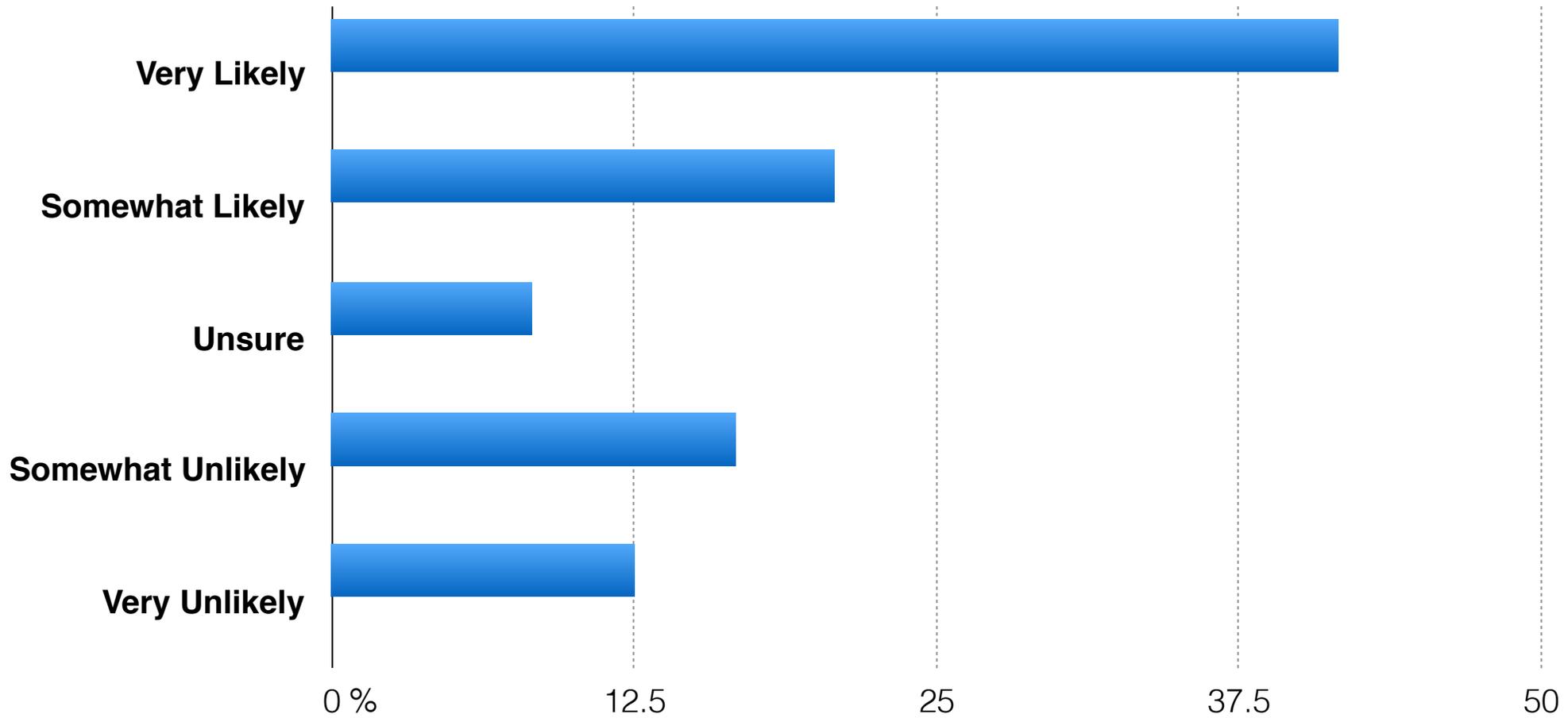
**Over a potential 12 months of such a comprehensive electronics ban, what level of falloff in business travel would you likely expect?**

Answered: 112 Skipped: 0



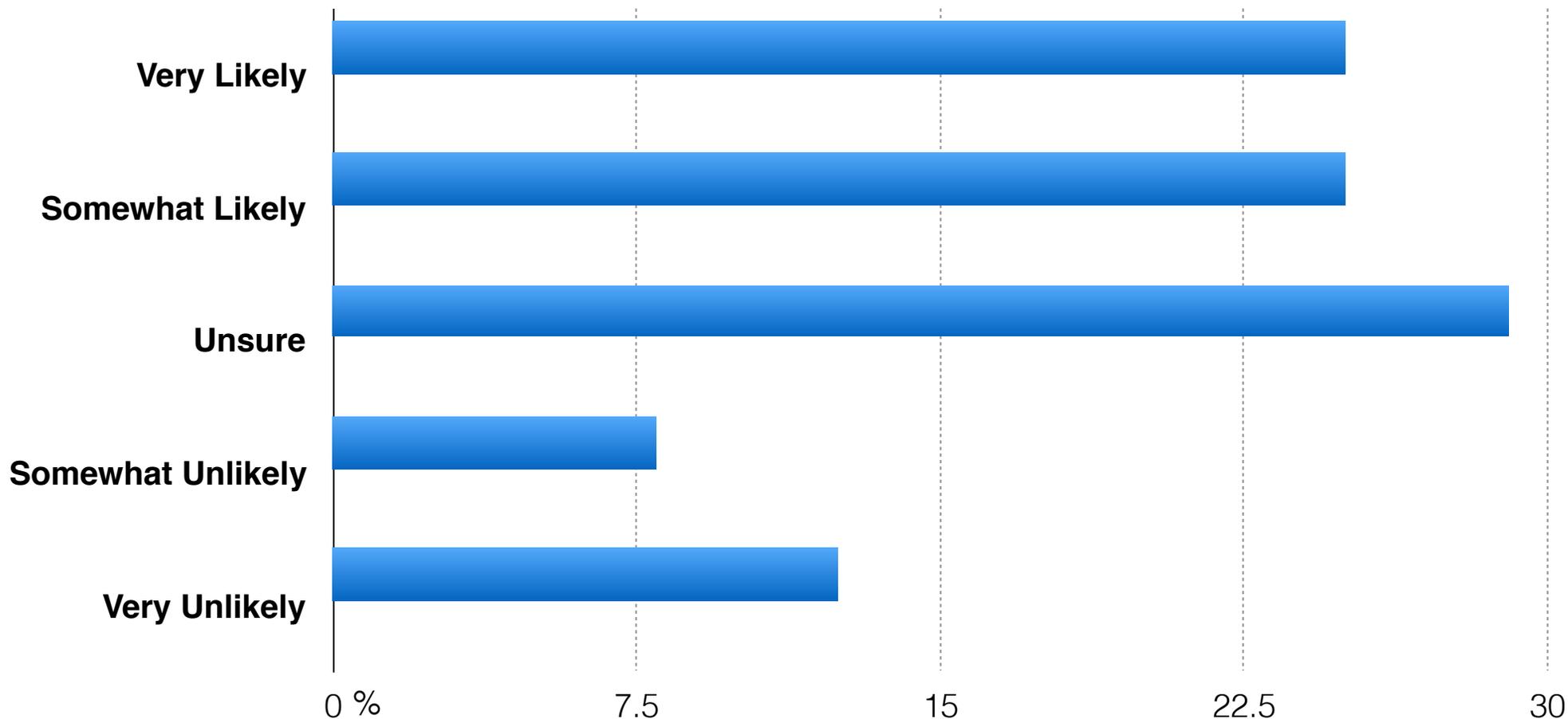
# Should the ban go into effect, would your travelers, who currently connect in Europe to points East and West, now likely seek alternative airlines/routings to reach their destinations?

Answered: 112 Skipped: 0



**Assuming a ban's implementation, the competitive playing field between Gulf and European airport gateways, for East and West traffic flows, will have been leveled with respect to the inconvenience and lost productivity due to the handling of electronics. Would your travelers likely switch back to more time-efficient transit over Gulf hubs?**

Answered: 112 Skipped: 0



**Assuming a ban, would your organization make more use of video conferencing and other advanced communications technologies to work with customers, prospective customers, suppliers and non-HQ staff?**

Answered: 112 Skipped: 0

