GLOBAL INSIGHTS

The future of aviation and air travel safety and customer confidence

The entire hospitality sector has been massively impacted by the pandemic, with aviation being one of the first to be hit, and a sector which will take a long time to recover. Airports expect that pre COVID levels of demand won't return until after 2022, however, the entire hospitality and business events sector is dependent on the aviation sector reassuring customers and creating trust in their operations so that they start taking to the air again.

Airports and airlines are adapting to a new reality and the industry as we knew it won't be the same in future:

➢ 97% of traffic at Heathrow airport has been stripped away
➢ Glasgow airport would normally see 45,000 passengers a day and this has fallen to 600
➢ In March, before the full lockdown was implemented, Edinburgh Airport was warning of 'close to zero passenger demand in the coming months'
➢ Aberdeen Airport has seen passenger numbers fall by 85%, which is slightly less of a fall than some other airports due to its role in transporting workers for the energy sector

Airline competition for passengers will be intense in future and the airlines which are agile, efficient and adaptable to future passenger worries will be the winners. Airports – and indeed whole countries – will have to play their role in ensuring a safe and clean environment in order to remain competitive.

The changes in airport and airline protocols will be as much of a game-changer, for passengers and companies alike, as the liquid and laptop bans did for airport security. We can expect changes in biosecurity measures and processes to be introduced across the board as one of the ways to restore trust in travel.

The International Air Transport Association (IATA) has issued it's 'Fly Safe' advice, Heathrow Airport has launched its **'Fly Safe'** objectives and standards, Edinburgh has its **'Let's all Fly Safe'** programme and Glasgow has issued its **'Helping Each Other To Travel Safely'** information to name but a few. Collaboration between governments and industry will be key to a single roadmap being adopted globally.

But it's not just airports which will contribute to safe travel. Bio safety measures will begin for travellers at home and the passenger experience will have a layered approach. The further 'upstream' in a journey that safety measures are begun, the less risk there is of congestion at airports which may result in contagion within the building.

Pre Flight and Check in

Before departure it is likely that travellers will have to provide detailed contact information for contact tracing and will be expected to enter personal data including health information. All of this will be done online prior to arriving at the airport. It's expected that all check ins will now be done online and not at the airline desk. Airline desks will have screens and airport staff will have appropriate PPE. Sanitiser will be freely available throughout terminals. Heathrow for example has 600 sanitisation points across the airport and face masks are now mandatory, removed only on request for security identity checks.

Departure Airport and Boarding

Terminal access will be minimised and there will be temperature screening, social distancing, face masks and comprehensive sanitisation of touch points. Self-service, touchless processes will be more common, as will biometrics. Self bag drops will be favoured and carry-on baggage limited. Queues will become longer in length, rather than in passenger numbers, to allow for physical distancing.

Inflight Experience

On board face coverings are likely to be mandatory across all airlines, passenger movement around the cabin will be limited as will catering offers. More frequent and more in-depth sanitisation will take place on planes.

For example, **Singapore Airlines** cabin crew will all wear masks throughout a flight and will wear goggles or eye visors when interacting with passengers. They will wear gloves when serving food from a restricted offering and on some flights the catering will be snack bags rather than meal trays.

The passengers will all be given a care kit for use during the flight – containing a mask which is mandatory inflight, hand sanitiser and anti-bacterial wipes. Any linens on board will be fresh on every flight and headsets and headrest covers and pillows are being replaced after every flight. Passengers will be seated in – and expected to remain in - designated seating zones which separate transit passengers from non travellers.

The Singapore fleet is fitted with HEPA filters which remove more than 99.9% of the microbes in the air and during the flight, the cabin air is refreshed every two to three minutes.

The inflight publications may be missing from the seat pockets, but Singapore Airlines has an app which allows passengers to access an e-library of over 150 publications which can be downloaded before a flight. Flyers will also use the app to control the Singapore Airlines inflight entertainment system.

Arrival Airport, Border and Customs

Temperature screening at the arrival airport will also be in place, and airports are working on ways to operate faster baggage claim processes to minimize contact and enable distancing. Technology will also play an increased role in border and customs checks with the use of mobile devices to complete electronic declarations which will automatically unlock control doors.

Airlines and airports have been lobbying for airbridges and the government announcement that the first EU countries to enter into these arrangements is welcomed by the travel trade and travellers alike. Similarly, the removal of quarantine measures by governments across the globe will allow for the restart of flight routes.

Building passenger confidence and keeping both travellers and employees safe is the sector's top priority as air travel moved from 'special ops' to the new 'normal ops'.

The IATA Roadmap For Restarting Aviation can be found **here**

Jo Roberts from London Heathrow Airport shared her thoughts with us on a recent conference call.

"For the first time in Heathrow Airport's history we have had to consolidate our infrastructure so terminals three and four and the southern runway have been closed. Last year we welcomed over 80 million passengers. In the first quarter of this year, which is always our quieter period, we had 14 million passengers through the airport. Our prediction for 2020 in total, including the first quarter and the remaining three which include our busiest periods of Easter getaways, half term, summer breaks and Christmas, is around 25 million passengers.

"The impact of COVID19 is worse than 9/11, the Gulf Wars and the ash cloud combined. Domestic and leisure will come back much more quickly than international and business travel.

"Underpinning all of our work at the moment is how to get consumer confidence back into air travel."