## The CTAIRA Passenger Confidence Survey - May 2020

We have now analysed the results of this survey where we were particularly interested to understand which activity or requirement, on its own, would be considered sufficient to give confidence to fly again once any restrictions were lifted. One of the views expressed to us in numerous webinars that we have participated in has been that of how traveller confidence would be restored.

The largest group of respondents (31%) answered that this "sufficient confidence" would result from testing passengers for the virus at the airport and only those who were virus free would be allowed to travel. This group was only slightly ahead of those who responded that the combination of masks and social distancing (27%), where on a narrow body the seats to either side as well as in front and behind them would be left empty, would give them sufficient confidence. The lowest response was in respect of temperature testing at the airport (8%). It is also interesting that only 15% of respondents considered that a mask alone gave them sufficient confidence to fly, notwithstanding the filtered airflow on an aircraft.

Chart 1 What is sufficient to give me confidence to fly again
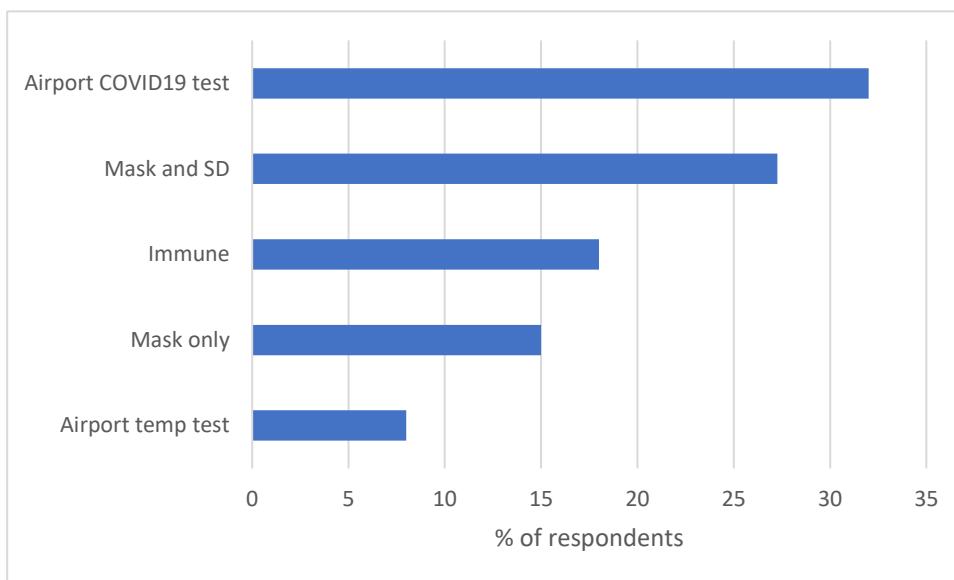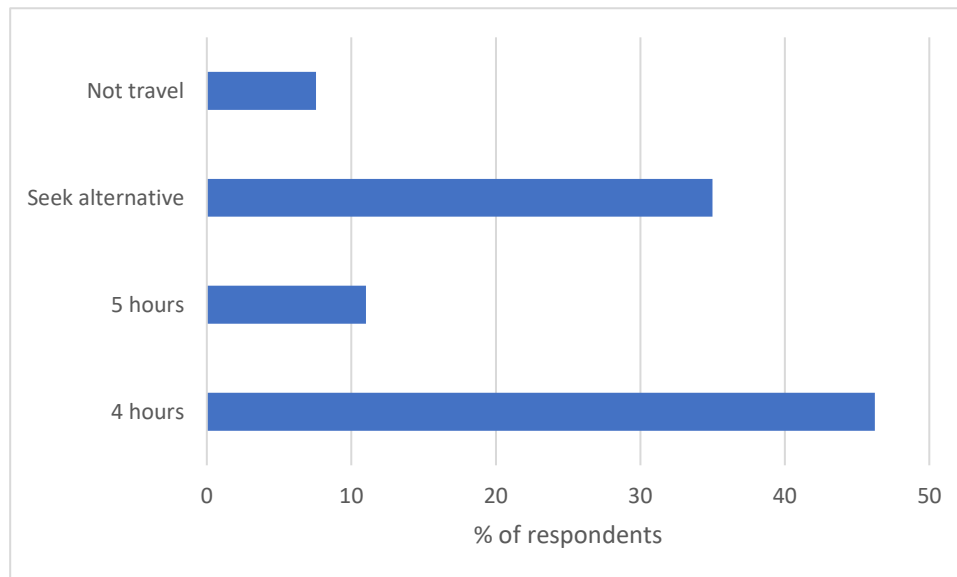

Source: CTAIRA

Although there remain, at the present time, a number of issues around, what type of test (antigen or antibody), the accuracy of all tests, and in particular the rate of "false negatives", which are reported to be even greater in the case of temperature tests, these responses are interesting. They clearly have implications not just for, governments and regulatory bodies, around the setting of international protocols and standards, but also for airlines and airports. For airports it is not only about the type of test and the availability sufficient space to accommodate and manage

passengers for the on-site tests, and the necessary rapid delivery of accurate results, but it is also about how to manage those intending passengers who fail the test and are not only prevented from flying (which may not be something that they agree with); it is also how they are isolated and what it means for those who were in close proximity to them given the current view that such people also need to immediately self-isolate and will not be able to fly either.

We then asked what the willingness would be to accept a longer check in time if this was considered necessary. Of course, the responses to this question will in part be determined by a range of factors including journey type and flight length, if there is a competitive alternative mode available. Indeed, in future surveys we will be looking behind these headline figures.

Given that almost 40% of the respondents to the first question saw some form of at airport test as a "sufficient condition", it is reasonable to expect that that there would be a recognition that more time would need to be spent at the airport. Indeed some 46% of respondents said that they would still fly if the minimum check in time was increased to 4 hours with a further 11% accepting an increase to 5 hours; Taken together some 57% of respondents would appear to be willing to accept an increase in the minimum check in time to 4 hours however a need to arrive at an airport at 0200 for an 0600 departure may in reality not be acceptable.

Chart 2 Would you still be prepared to travel if you were required to arrive at the airport: 4 hours before departure? Or 5 hours before departure?
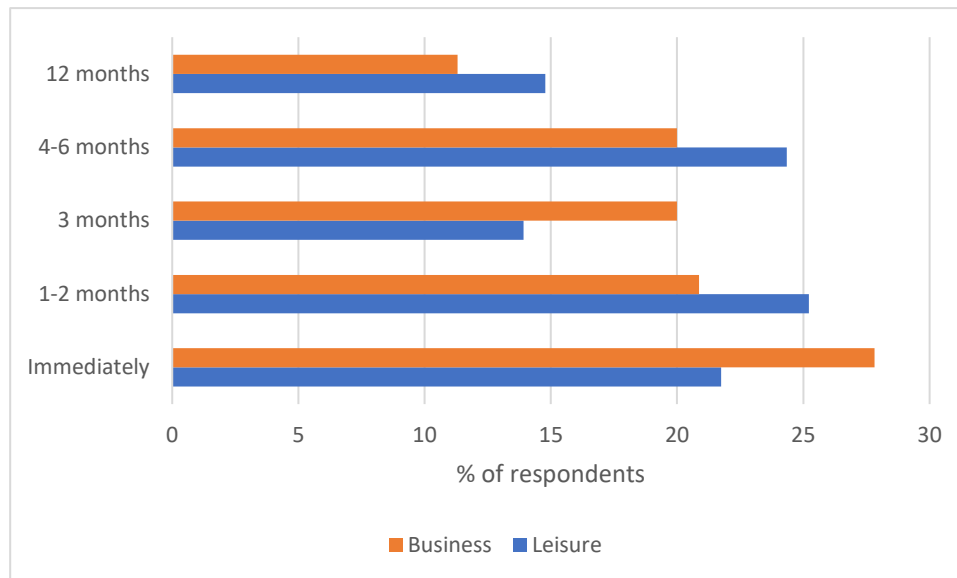

Source: CTAIRA

We also asked how long, after the lifting of any travel restrictions, it would take for the respondents to travel by air again on either leisure or business. We recognise that as the survey group is likely to include a large number of respondents with an aviation background, it would be reasonable to expect the signalling of an earlier return to travelling from this group subject to the

satisfaction of the confidence condition, when compared to a broader group and the data may well bear this out.

We have also analysed the time taken to return to travel on the basis of what was identified as the "sufficient condition" to fly again but there is no consistent pattern here.

Chart 3: After the restrictions are lifted how long will it be before I fly again?

Some 47% of our respondents suggested that they are likely to be travelling again for leisure purposes within two months, with some 49% saying that they would travel for business purposes within the same period. We have also compared the views by the respondents in respect of the return of their own business and leisure travel and although similar it was not identical.

The data from our survey suggests a much quicker recovery than we have seen reported in other surveys and perhaps, given the likely background of many of the respondents, this may reflect a degree of "optimism bias". However, it is clearly rational that if you are satisfied that your sufficient conditions for travel are met (Question1), your view will be that it is safe to travel. The timing of the return of leisure travel will also reflect both the state of household finances and also when holiday periods arise. Indeed, future responses to this question may be different with fewer expecting to travel in the near term if restrictions are still in place in July and August. In the case of business travel its return will reflect a range of economic and company policy factors.

An issue, in the case of leisure tourists in particular, in terms of realising their ambitions to travel, is one that is perhaps best described as the change in "destination capacity" and where this will both restrict supply and increase the price.

In Europe we have seen the start of the reopening of a number of countries both where the impact of Covid-19 was particularly limited (Greece) or where it is now seen to be under control, amongst other countries Italy. Whilst the importance of re-opening in economic terms cannot be understated, this is against the background where there will be a need to avoid "importing the virus" and where, in the absence of so-called Covid-19 passports, the actual "status" of any person cannot yet be demonstrated. Consequently social distancing, although there is no agreement on the "compliant distance and where the UK has 2 metres and France and Italy have 1 metre, will be a feature of travel at least over the near and medium term. The size of the "compliant gap" clearly has an impact a whole range of travel processes around queuing as well as, for example, restaurant capacity; a 2-metre gap reduces capacity at casual dining restaurants to 33%, of what it was pre-lockdown, whereas if it was 75cm it is estimated that such restaurants could operate close to full capacity. As we have suggested elsewhere, whilst social distancing is in place it will put an end to the ever-popular buffet style of meals at any establishment, at any time of the day and not just on land. Furthermore, one of the features of the re-opening of the Greek Islands to tourists has been that hotels are reported to have restricted their capacity to 50% and that one hotel on each island is on standby to be an "isolation hotel".

Of course, until there is a vaccine we will adjust to the necessary conditions although it is perhaps important to consider the following. Whilst the protocols that have been proposed by WTTC are an important starting point, they are only a partial solution in a pre-vaccine environment. For the aviation market to meaningfully restart, travellers will need to be demonstrably virus free. However, at present time, and at the simplest level, people fall into one of two groups; those who are immune because they have had the virus and those who aren't because they haven't had it. On its own, the test to show whether you have it at a particular point in time, as appears to be proposed to be used at airports, i.e. an antigen test), will not tell if you have had it. As a result without mass antibody testing (and where there is now hope that the latest tests are sufficiently accurate and meaningful, given that there are still areas of uncertainty around virus-induced immunity) it is impossible to determine who is immune and who is still at risk because they have not been infected by the virus.

There is not only a need to know who is in the first group but also for the individuals in this group to be able to communicate this to whoever needs to know. Whilst this inevitably gives rise to separation and in effect a "badge" to those who are immune, the positive consequences of this will outweigh a number of identified negative consequences (i.e. those who don't have the badge of immunity. This is however something for the scientists and politicians. In effect it could be a modern day version of the yellow vaccination certificates that we used to have to carry but where today, and in the case of travel, it could be entered in the same way as a frequent flyer or ESTA number and relate back to our personal data. Indeed, we are working with a group examining the range of issues which encompass testing, data science and communication.

Thank you again to those who responded to the survey. We will be repeating it at the start of June to see if and how perspectives have changed. We will also be launching another survey later this week on other aspects related to travel so please look out for that.