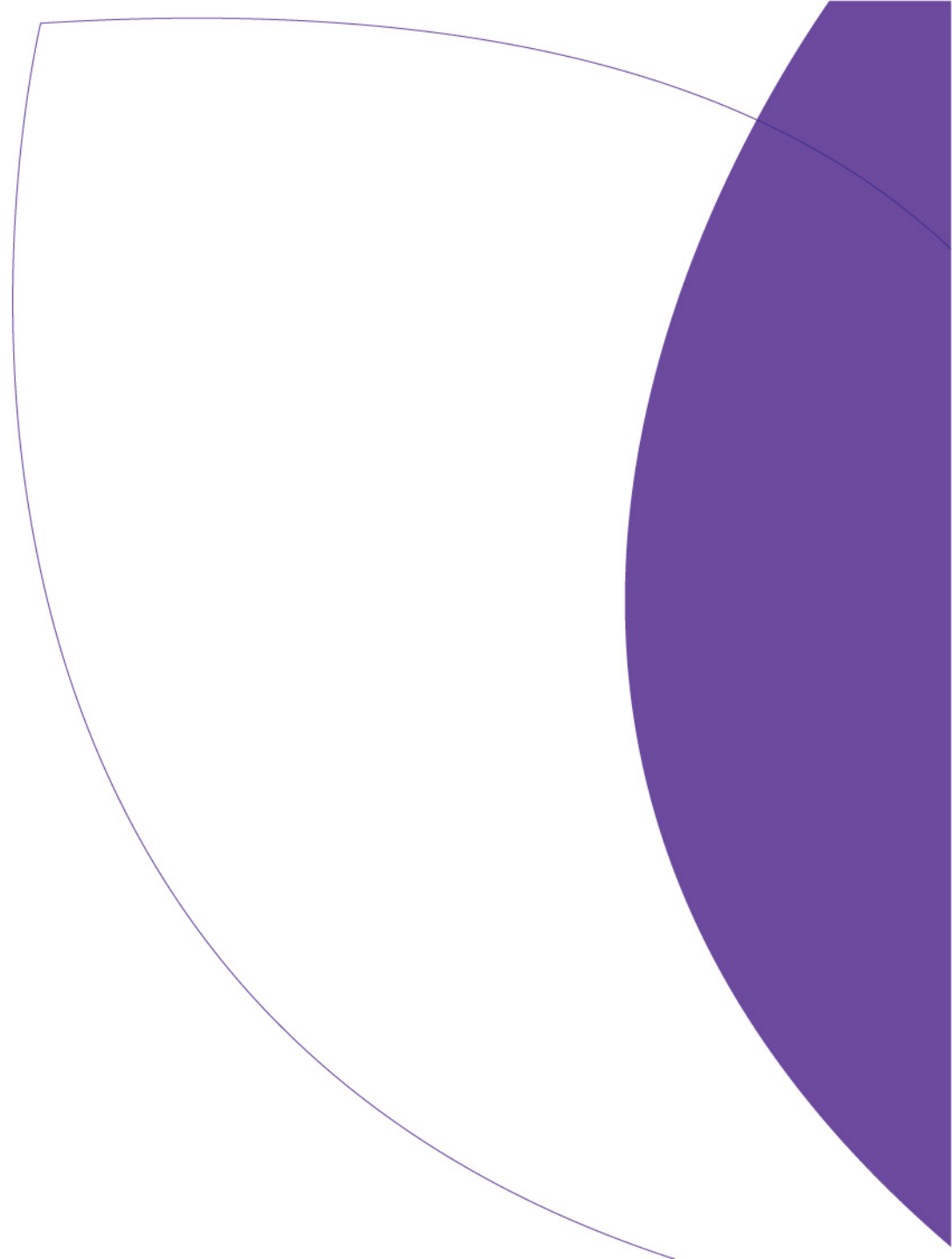




KPI.Aviation Marketing Solutions

What North American Air Travelers expect from Airports in the COVID-19 Era

May 2020



Survey Background

- ✈️ COVID-19 has brought air traffic worldwide almost to a halt. Some airports in North America reported as much as a 95% decline in air traffic during March and April compared to the same time last year. Industry analysts predict that air travel will again pick up but much like many other aspects of life, airports are also preparing for the new 'normal' when it comes to air travel post COVID-19.
- ✈️ There is still no clear picture of what air travel will look like and what the new normal will be in the months and years ahead, but at KPI we wanted to do what we do best – paint the picture of the current and future state of air travel. We accomplished this by talking to passengers across North America and asking about their current and future behaviors, attitudes, and beliefs about air travel and the airport experience.
- ✈️ KPI's intention is to understand North American air travelers' expectations with regards to airport processes and commercial services during the COVID-19 era, the airport actions that would reassure and encourage passengers to return to travel earlier, and passengers' emotional behavior towards air travel.
- ✈️ The survey intends to complement the range of intelligence produced in the past two months relating to passengers' overall air travel perceptions, having a specific focus on airports.

Survey Details

The survey took place between 13-18 May 2020, with respondents completing the survey online. It focused on air travelers in the USA and Canada who had flown at least once in the past six months either domestically or on international flights.

Surveys were received from 509 respondents: 78% from the USA and 22% from Canada. The male to female ratio was 51:49, with an average age of 41 years old, and respondents taking an average of 3.6 trips per year.



Online survey



May 13-18, 2020



399 US travelers

110 Canadian travelers



Areas of Investigation

Demographics:

- ✈ Age, Gender, Residence

Travel Profile:

- ✈ Historic frequency of travel for business, leisure, international, domestic and trans-border (US/Canada)
- ✈ Passengers likelihood of future travel in the current climate
- ✈ Willingness of passengers to change their routines for travel through airports

Passengers Expectations:

- ✈ Airport actions that will encourage travel in next six months
- ✈ What precautions passengers are willing to take when traveling
- ✈ What are passenger expectations for the airport processes
- ✈ What are passenger expectations for airport services including Food & Beverage and Retail

Main Findings



Summary of Main Findings

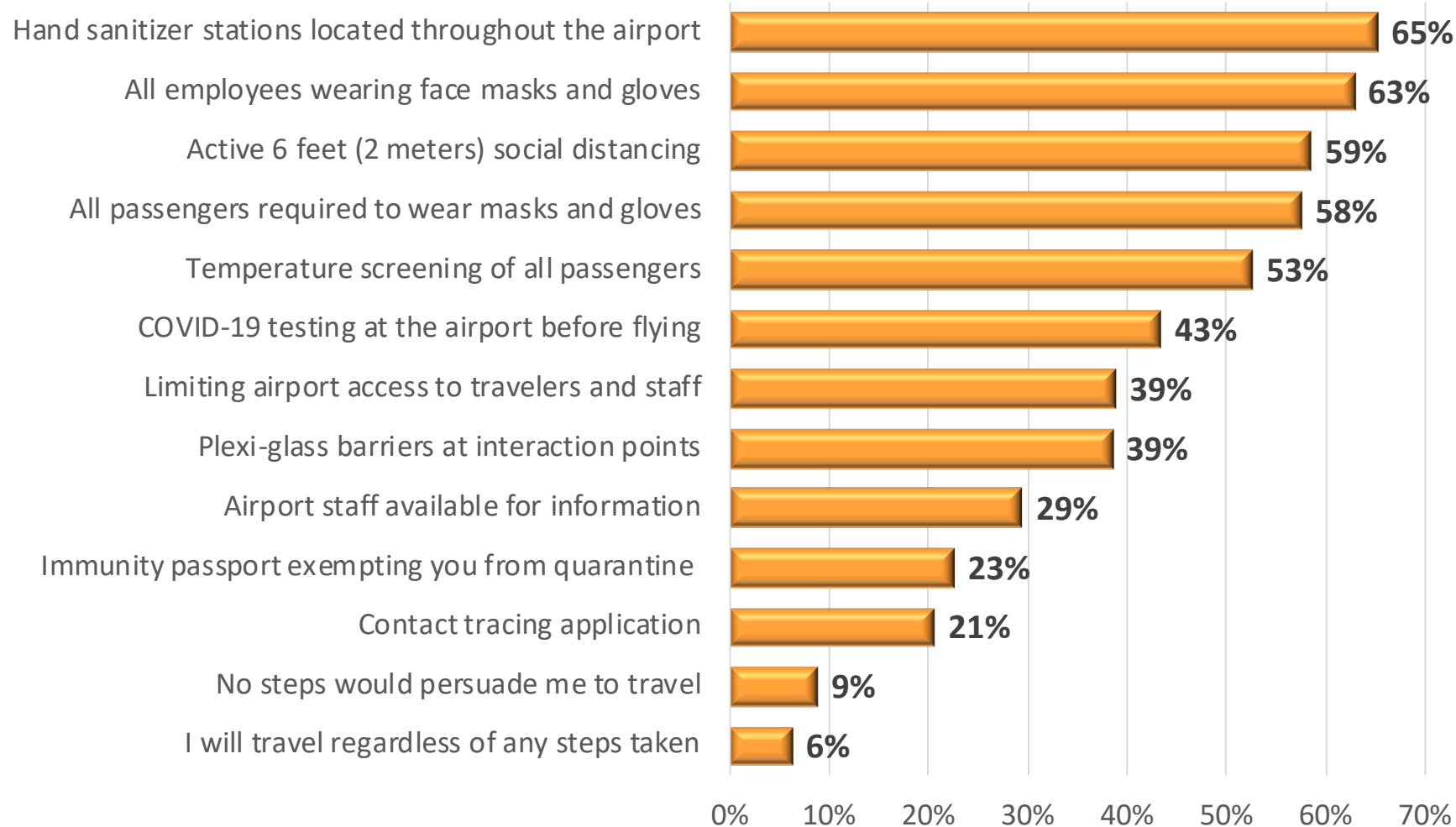
- ➔ Clarity and consistency of measures required by passengers traveling through airports (and on airlines)
- ➔ Clear and understandable airport messaging is vital with regards to the safety precautions and sanitization processes being taken by airports, as well as the availability of airport services
- ➔ The majority of air travelers will return in the next six months, but many need reassurance to do so
- ➔ Passengers are comfortable and prepared to change their travel habits and undertake new procedures and checks at airports
- ➔ Food & beverage and retail outlets at airports need to adjust their offerings and the way they interact with their customers
- ➔ The majority of air travelers are currently concerned and cautious about the safety of the whole air travel journey



Airport Actions can give Passengers Confidence to Travel

Question: What steps taken by airports would persuade you to travel by air in the next 6 months?

Multiple responses possible. Percentage of respondents who ticked each response

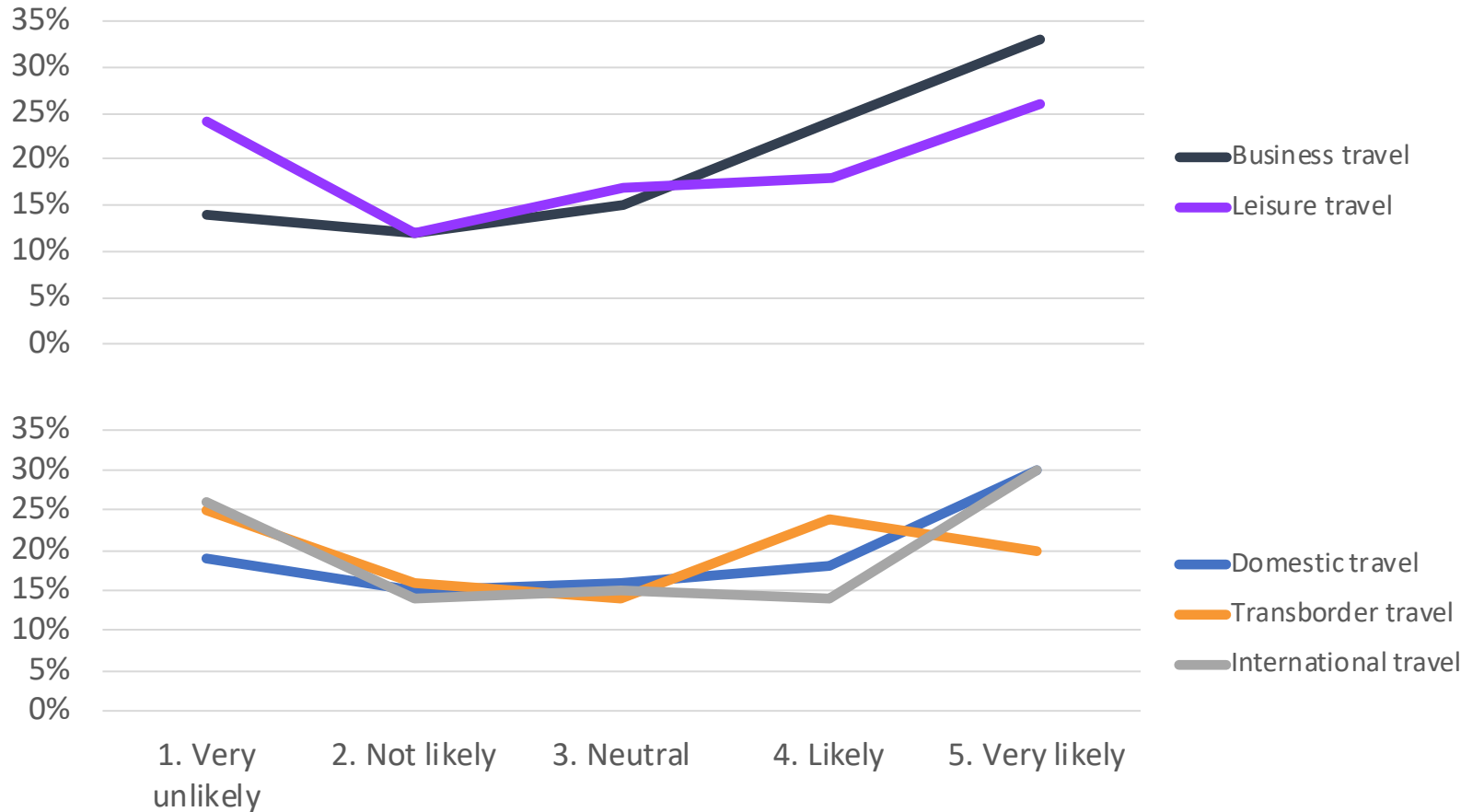


- Passengers seem to be persuaded by the recent safety guidelines for air travel
- Protective measures are more motivating than health checks and screening



The Likelihood of Future Travel varies by Group

Question: Assuming relevant flights are available, how likely are you to travel by plane in the next six months? Scale of 1-5 (1 is Not very likely, 5 is Very likely)



Likelihood of traveling, by Group (mean average):

Business	3.44
Domestic	3.18
International	3.02
Leisure	3.02
Transborder	2.93

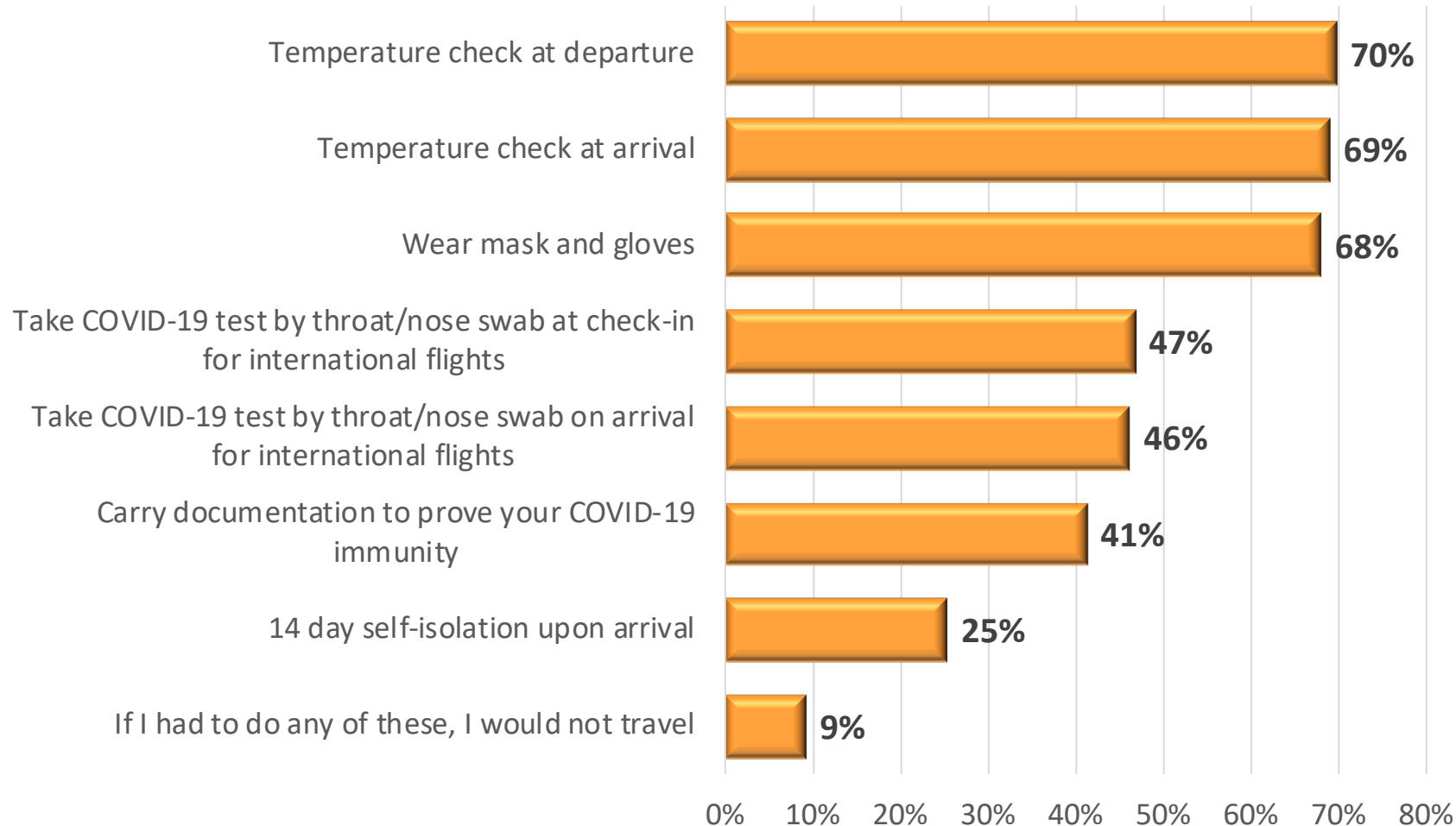
- 58% of passengers who have traveled for business in the last year are likely/very likely to travel in the next 6 months, compared with only 44% of leisure passengers



Passengers accept Temperature Checks before Traveling

Question: Which of the following would you be prepared to do at an airport to be allowed to board an aircraft?

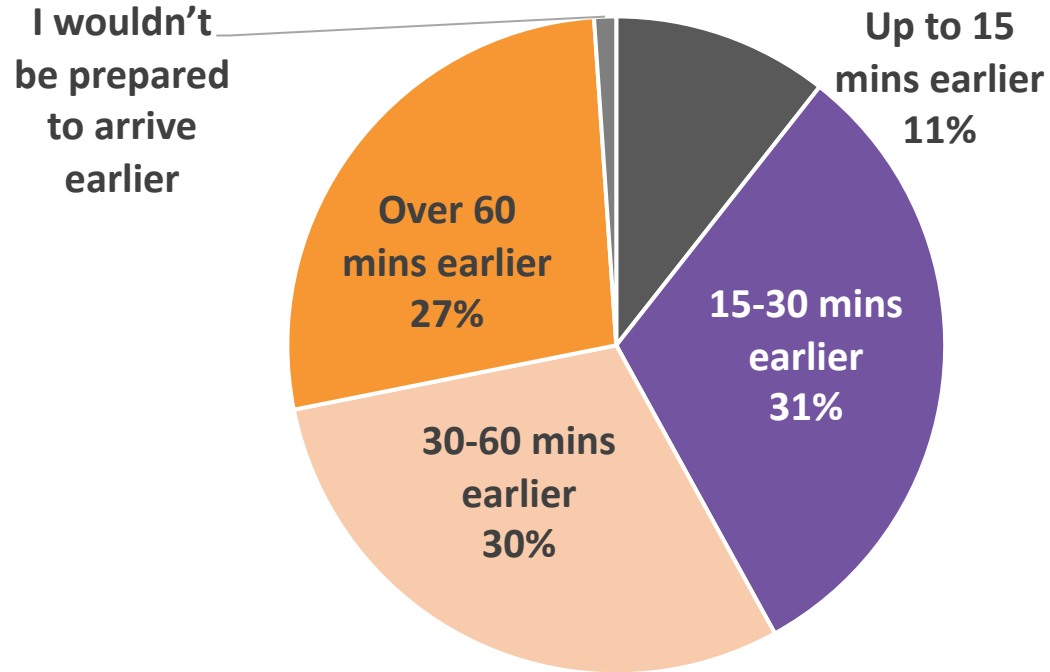
Multiple responses possible. Percentage of respondents who ticked each response



- Older respondents and less frequent travelers are more prepared to take tests
- Younger respondents are more prepared to wear masks, as are the frequent travelers who may prefer not to encounter additional processes at airports

Passengers are prepared to change their Travel Habits

Question: How much earlier than your normal routine would you be prepared to arrive at the airport to complete any required new checks and procedures?



- 57% of travelers are prepared to arrive more than 30 mins earlier
- 25% of frequent travelers are only prepared to arrive up to 15mins earlier

Question: And in which area of the airport would you be most comfortable with COVID-19 checks and procedures taking place?

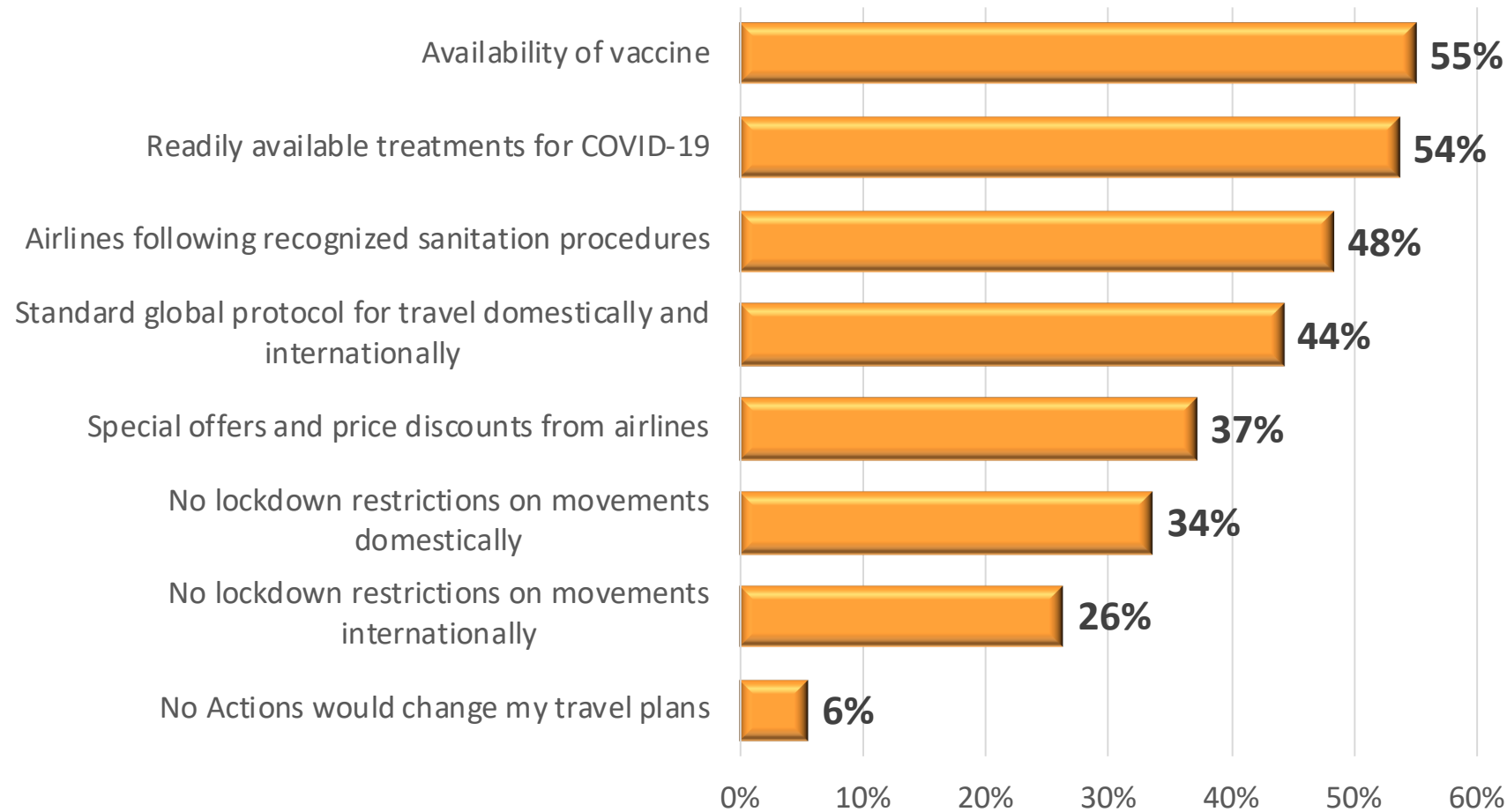
At designated COVID-19 testing/checking areas	27%
At security	24%
At check-in kiosks	21%
At the curb/drop-off/airport entrances	19%
At boarding gates	8%

- 46% of travelers would prefer to finish their COVID-19 checks and procedures before they start their normal airport processes (at airport entrances or at designated areas)

Vaccine and Treatments will underpin a return to Travel

Question: What would make you travel more by air in the next 6 months?

Multiple responses possible. Percentage of respondents who ticked each response

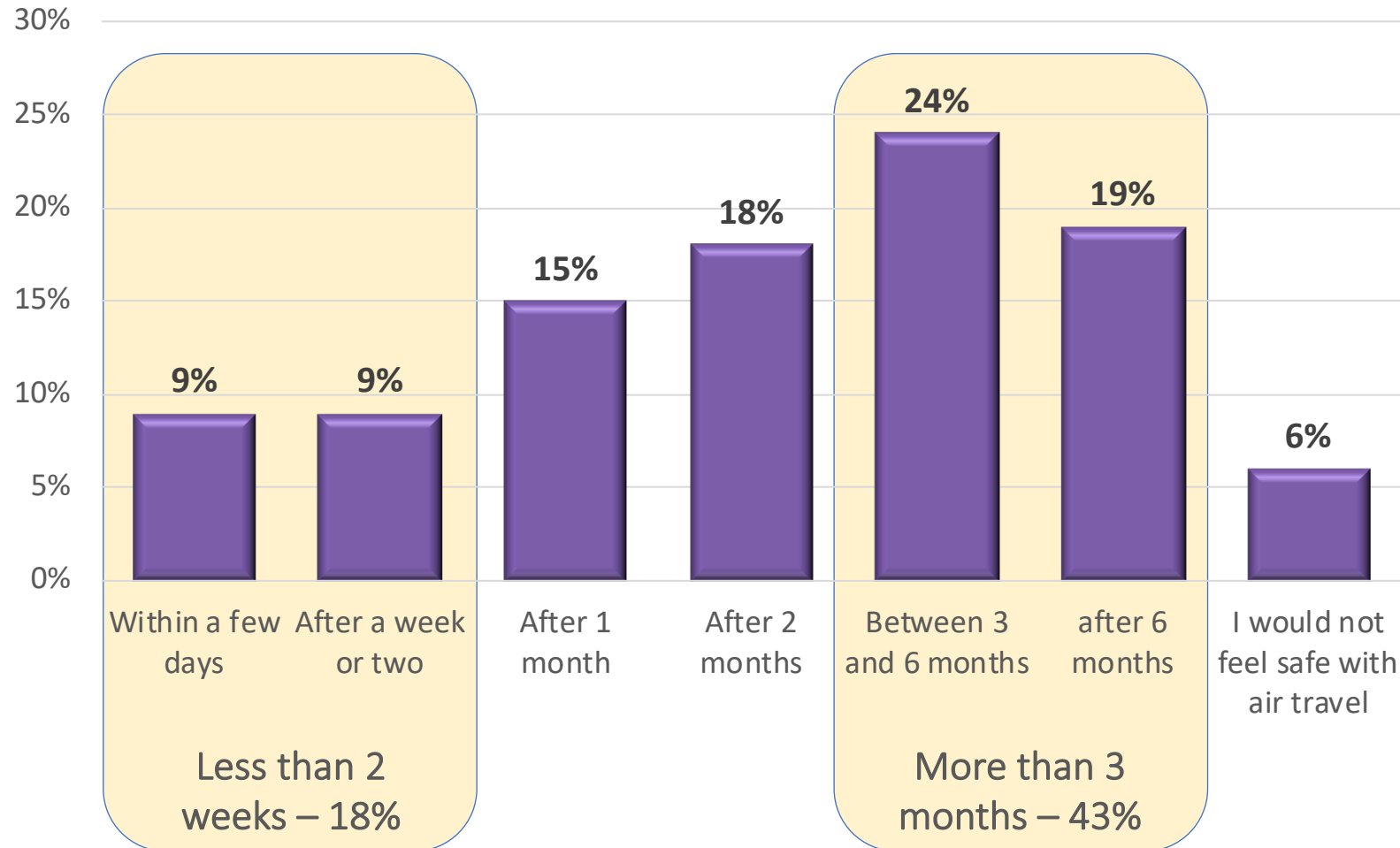


- 75% of frequent travelers would travel more with the availability of a vaccine and 68% with readily available treatments
- Younger respondents would travel more with no lockdown restrictions



Majority of Travelers will return, but will take some time

Question: Assuming a trusted source, or government or medical official said it was safe to fly, how soon would you feel comfortable traveling by air?

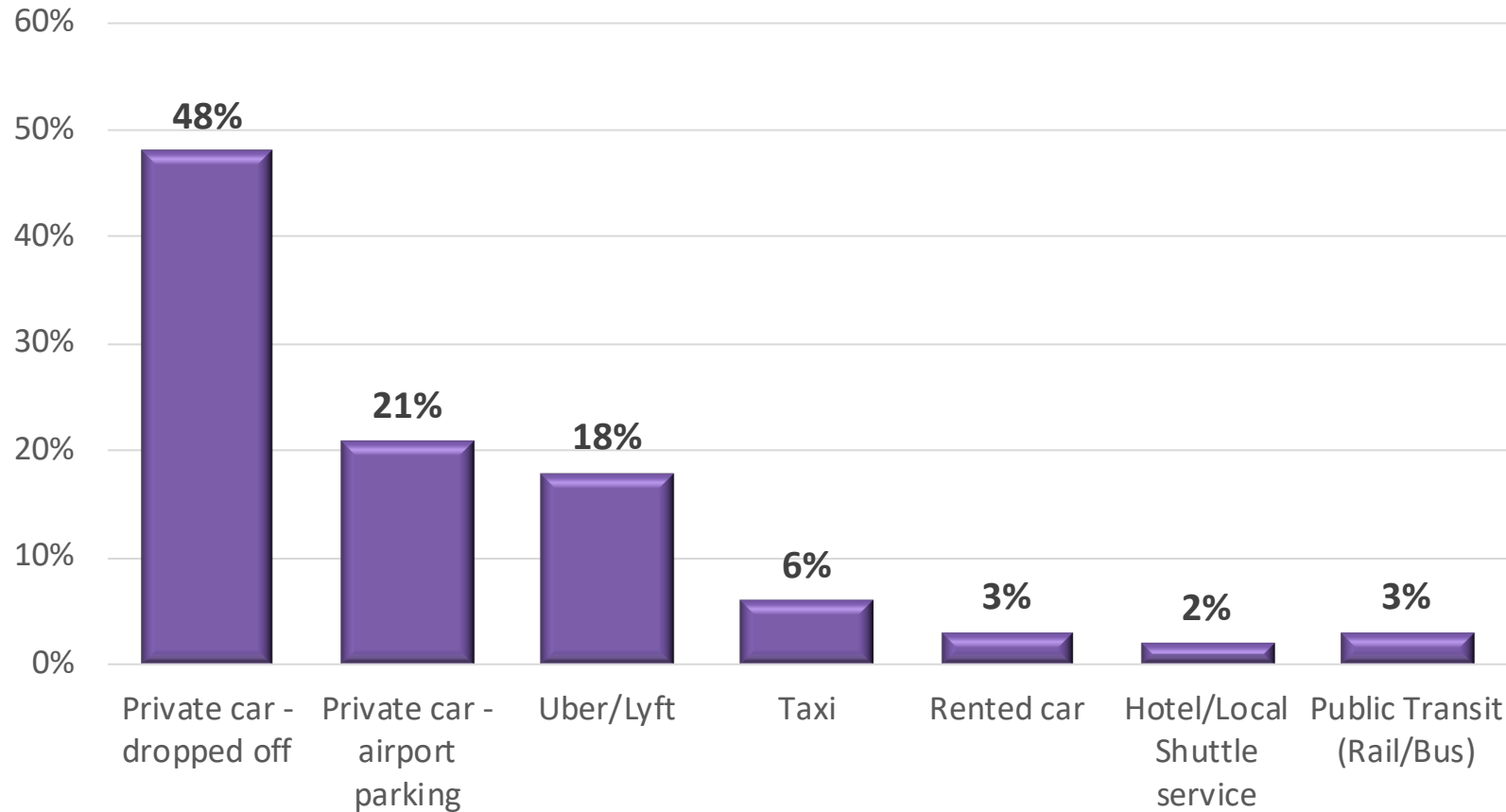


- 75% of travelers will return within six months
- 84% of frequent travelers will travel within the first three months
- US citizens are likely to travel sooner than Canadians [56% vs 34% within the first three months]
- Travelers under 36 will travel earlier; travelers over 65 will be the last to start flying again



Preference of Private Car to reach the Airport

Question: For your air travel in the next 6 months which transportation means would you prefer to use to access the airport?



- Private Car use for US and Canadian respondents is the same, but there is a preference for dropping off by Canadians
- Travelers seem to be less adamant to use Uber/Lyft/Taxis than before the COVID-19 period
- Fewer travelers are likely to use car rentals in the next 6 months

Cleanliness and Masks required across all Touchpoints

Question: What changes, if any, would you expect to see at the **airport security procedure** as a result of COVID-19? **

All security staff wearing masks and gloves	78%
COVID-19 temperature testing	67%
New cleaning and sanitizing procedures for hand luggage screening	67%
Reduce amount of hand luggage allowed per passenger for screening	38%
No requirements for a personal search	16%
No change to current practice	4%

Question: Regarding the **gates/waiting areas**, what are your expectations as a result of COVID-19? **

Hand sanitizer stations at gates	69%
All staff wearing gloves and masks	67%
Seats spaced for safety reasons	65%
Regular visible cleaning of gate areas	60%
Larger designated queueing area with 6 feet (2 meter) distance	55%
Staff providing masks and gloves to passengers	53%
More seats provided	34%
No difference from pre-pandemic travel	3%

Question: What are your expectations of the **baggage reclaim area** as a result of COVID-19? **

Hand sanitizer stations at each baggage belt	74%
All staff wearing masks and gloves	70%
Designated areas to stand 6 feet (2 meters) apart	64%
Regular visible cleaning of baggage reclaim area and baggage trolleys	61%
Airport staff sanitizing all bags and removing from belt	55%
No change to pre-pandemic travel	5%

- New cleaning and sanitizing procedures for hand-luggage screening is an expectation for passengers

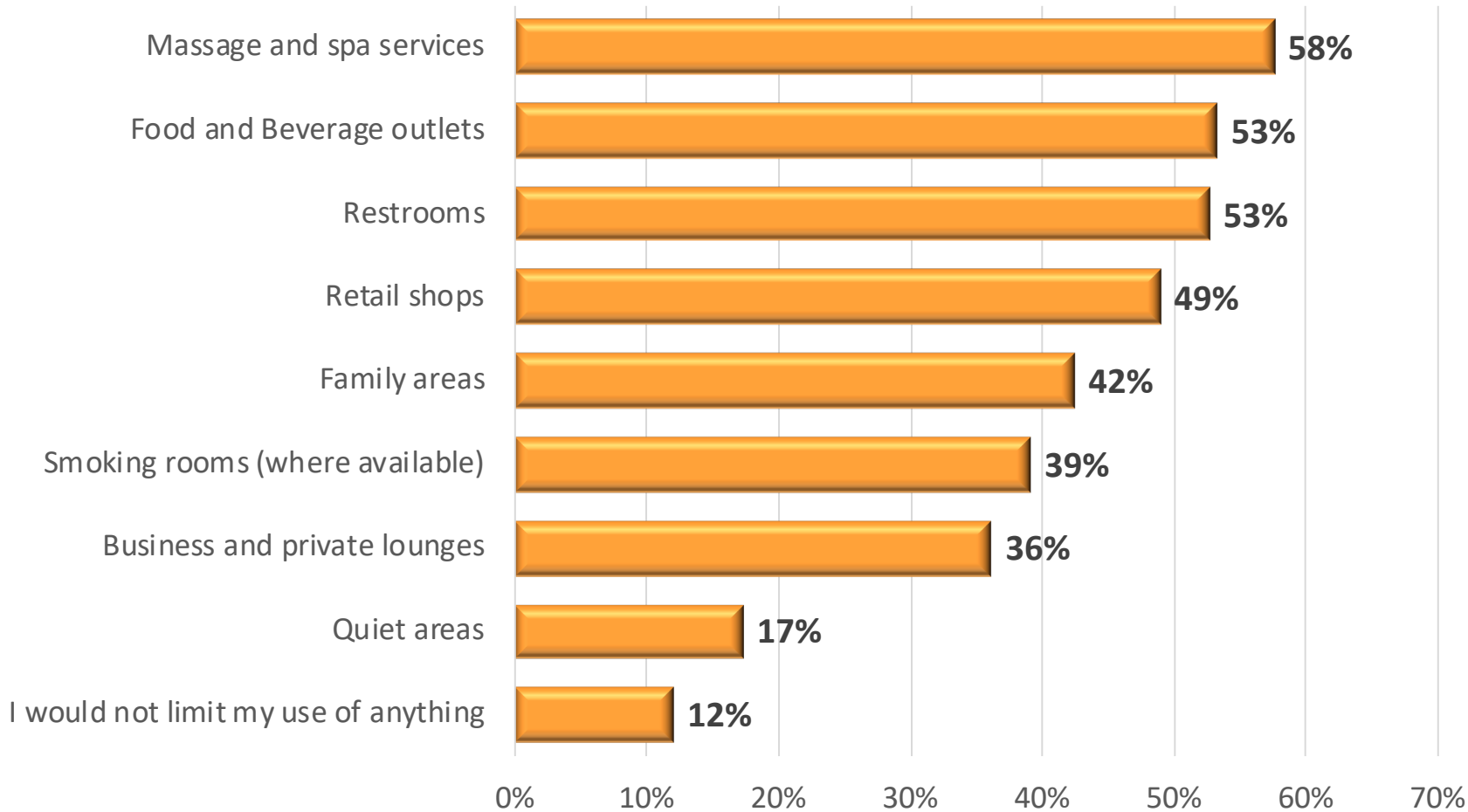
- Besides sanitizers and masks, a re-organization of the gate area is expected together with regular visible cleaning

- Concern about cleanliness of bags delivered from baggage handlers and visible cleaning of trolleys and the baggage area

Facilities and Services will need to show they are sanitized

Question: Which of these would you limit your use of at the airport as a result of COVID-19?

Multiple responses possible. Percentage of respondents who ticked each response

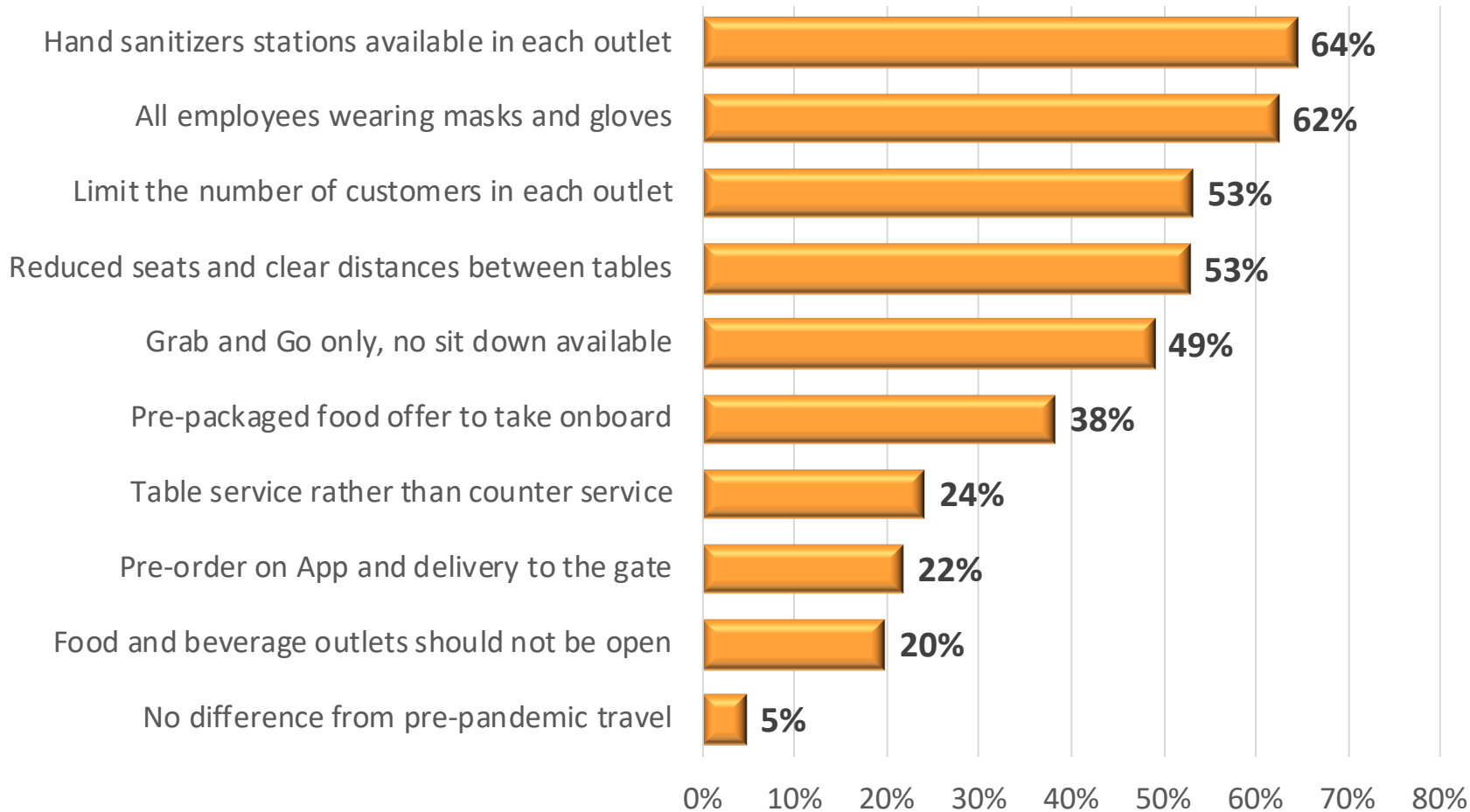


- No specific variations between types of respondent
- A broad concern across all passenger groups regarding the sanitization of facilities and services

Range of F&B offer will continue to be important

Question: What are your expectations from the Food and Beverage outlets as a result of COVID-19?

Multiple responses possible. Percentage of respondents who ticked each response



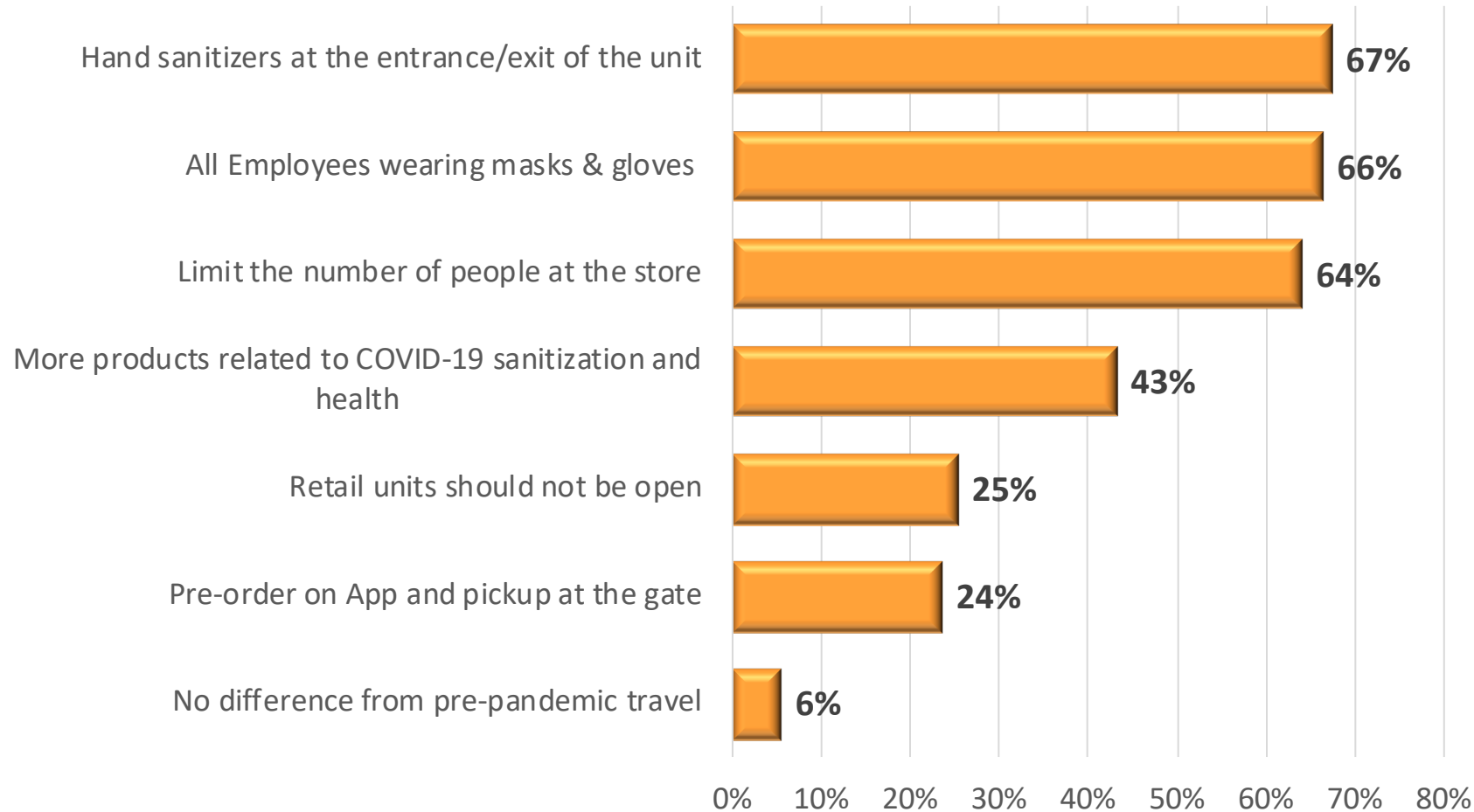
- All travelers expect the hygiene-related guidelines to apply to F&B
- Half of respondents prefer Grab & Go services; with 64% of frequent travelers also preferring Grab & Go
- 38% of respondents expect to buy food for their flight at the airport
- Ages 18-25 and frequent travelers are the most promising target groups for pre-order of F&B via App.
- 20% of travelers don't believe that food outlets should be open



Retail needs to offer COVID-19 Health Products

Question: What are your expectations from the retail stores as a result of COVID-19?

Multiple responses possible. Percentage of respondents who ticked each response



- Besides the hygiene-related actions, travelers expect more COVID-19 health related products
- 24% of travelers are considering Apps for pre-ordering retail, with ages 18-45 and frequent travelers being the most promising target groups
- 25% of travelers don't believe that retail outlets should be open



How ready are Travelers for the new 'Travel Normal'?

➔ It is undeniable that passengers want to return to flying. But travel, at least for the coming year will be very different from what they knew; extra hassle, longer dwell times, more processes, and less fun. Are they ready for that?

➔ Our respondents will think twice before they decide if it is worth flying since they are **nervous, worried and cautious** about the current safety of air travel. We have of course the frequent flyers and the younger generation who are more **optimistic** and have **no concerns**, ready to take the necessary **precautionary measures** that will allow them to jump on the next flight.

➔ Restoring confidence to the traveling public for the whole passenger journey is therefore paramount. Specifically for airports, passengers want to know that **protocols** and guidelines (e.g. **sanitization, visible cleaning, social distancing**) are in place and adhere to CDC and WHO specifications.

➔ At the same time, passengers expect that their experience at the airport will still have the elements of the pre-COVID-19 era, adjusted to the new reality. Retailers and F&B operators should re-invent themselves by offering new range of products and services and using digital platforms to ensure touchless interaction.

➔ Finding a **vaccine** or **effective treatments** will clearly boost passenger confidence, but this may take some time and passengers recognize this. In the meantime airports must incorporate the new processes into their customer experience journey map in the most seamless and efficient way to make travelers feel that it is still worth taking a flight.



Airport Protocols
Need Vaccine Sanitizing
Worried Social Distance
Discounts No Concerns
Cautious Passenger Testing
Airport Cleanliness Risky
Nervous Optimistic
Need based Anxious
Precautionary Measures
Effective Treatment

Our Respondents' Comments on the new 'Travel Normal'

"As long as it is safe to travel and all necessary safety precautions are followed, I will travel."

The Cautious Traveler

"I will NOT travel until I have taken a vaccine"

The non-Traveler

"I think if the guidelines are met and everyone abides by them there should be no reason why anyone should not travel"

The Common-Sense Traveler

"Cohesive plan - to date - I am seeing a mish-mash of different plans - not seeing a defined plan that is agreed to by all groups"

The Technocrat Traveler

Not worth the money or the risk given all the multiple chances of catching the virus, from taxi to airport to plane to restaurants and hotels"

The Risk-averse Traveler

"I can't wait for the lockdown to be lifted, so that I can travel"

The Optimistic Traveler

I am very skeptical. My main concern is to keep my family safe.

The Skeptical Traveler

"We can't keep sheltering at home forever. Life has to go on, so wearing masks, being cautious of cleanliness of hands and surfaces"

The Pragmatist Traveler

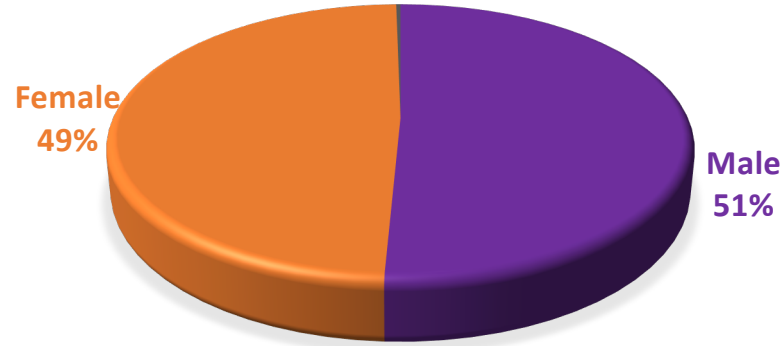


Demographics

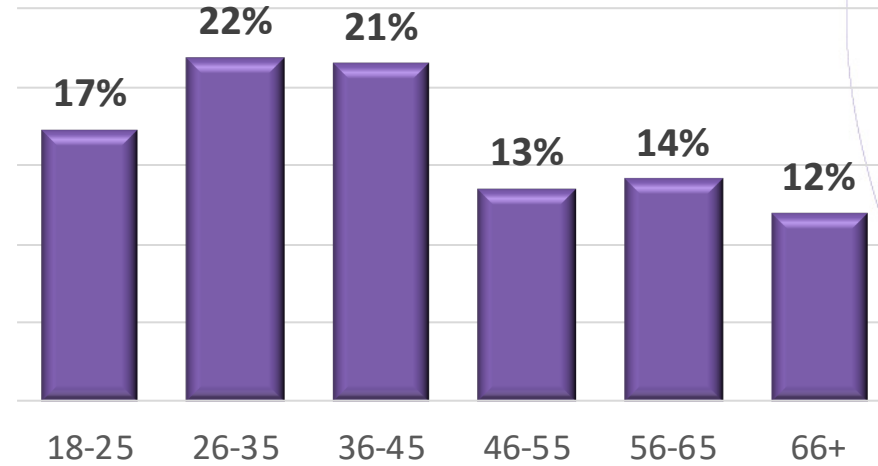


Key Demographics of all Respondents

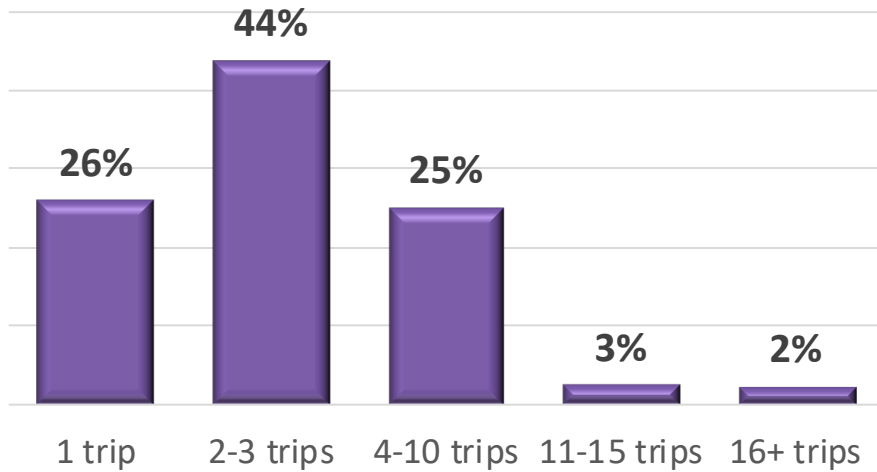
Gender



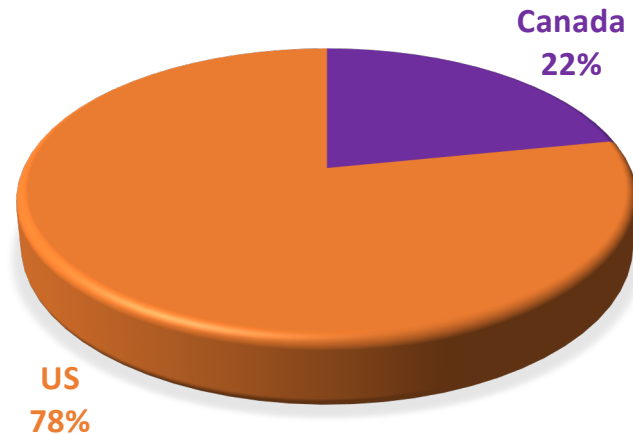
Age Range



Frequency of Travel



Residency



For more information on KPI Aviation Marketing Solutions please visit our website www.kpiamerica.com, or get in touch with us directly. We'd love to hear from you.

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