

The CTAIRA Passenger Confidence Survey – June 2020¹

Overview

In the second of our passenger confidence surveys we wanted to get some perspectives not only on what the sufficient conditions were to give passengers confidence to travel again but views on issues around testing and quarantine.

Taking issues of testing and quarantine first the respondents to our survey suggested that:

- Some 66% of respondents would want an airport virus test conducted, and the results returned, within 30 minutes.
- Some 46% of respondents thought that governments should pay for the test with 39% signalling that it should be the passenger.
- If it was determined that the passenger should pay, then some 36% of the respondents replied that they would be prepared to pay up to £10 with 35% stating that they would be prepared to pay between £10 and £20.
- Some 65% thought the test should be on departure only; There were 32% who responded that there should be a test on both on departure and on arrival.
- Some 96% of respondents said that they would not travel for leisure if they were required to go into a 14 day quarantine period at their destination.
- However, in respect of going into a 14 day quarantine period quarantine when returning from a leisure trip, some 24% said that they would still travel.

Looking behind the headlines

We started by asking a modified version of a question we used in the May survey when we asked what would be sufficient to give you confidence to fly again? This time we added an additional “answer option”; none of the above. What was clear from the responses this time was that opinion was much more divided over what one action would be sufficient to give confidence; since the last survey there has been a considerable attention focused on temperature testing and also the wearing of masks and where in the UK this has just been mandated as necessary to use public transport² where this may have influenced the views.

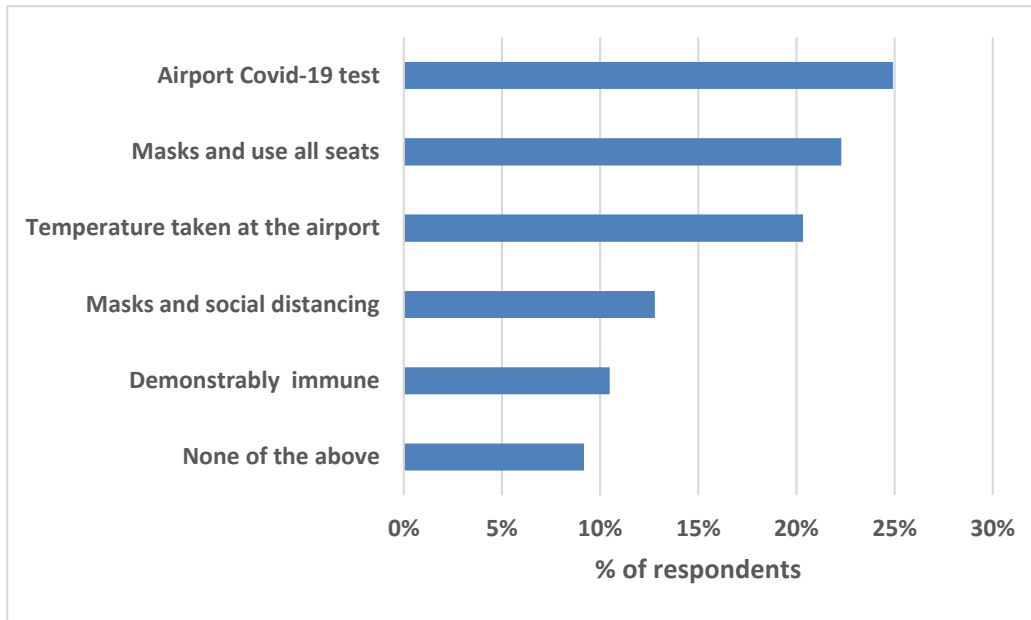
Whilst having a Covid-19 test at the airport still attracted the greatest support (25%) and on an adjusted basis was close to the result in the May survey, not only was there a much greater support for masks, without on-board social distancing, but also for temperature testing. At the

¹ Survey conducted between 2nd and 6th June via LinkedIn and other social media platforms; number of respondents 306

² Although in fact in the case of over-ground railways it appears that they do not need to be used at stations

same time 9% responded that “none of the above”³ which coincidentally similar to the number that suggested that they would require passengers to be “demonstrably immune” before arriving at the airport.

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



Source: CTAIRA

The guidelines from amongst others EASA⁴ and Airports Council International (ACI)⁵ highlight the need not only for testing but also a test that is appropriate. When considering this ACI notes that whilst a temperature test may well give some confidence to passengers and dissuade some intending passengers from travelling, on its own it is not a sufficient test to determine whether somebody actually has the virus. As a result, we thought it was important to gauge the feeling around tests for the virus whether these fell into the group of antigen tests (whether you have it now) or antibody tests (that you have had it) as it is considered that it is tests of this type that in reality would provide the actual confidence.

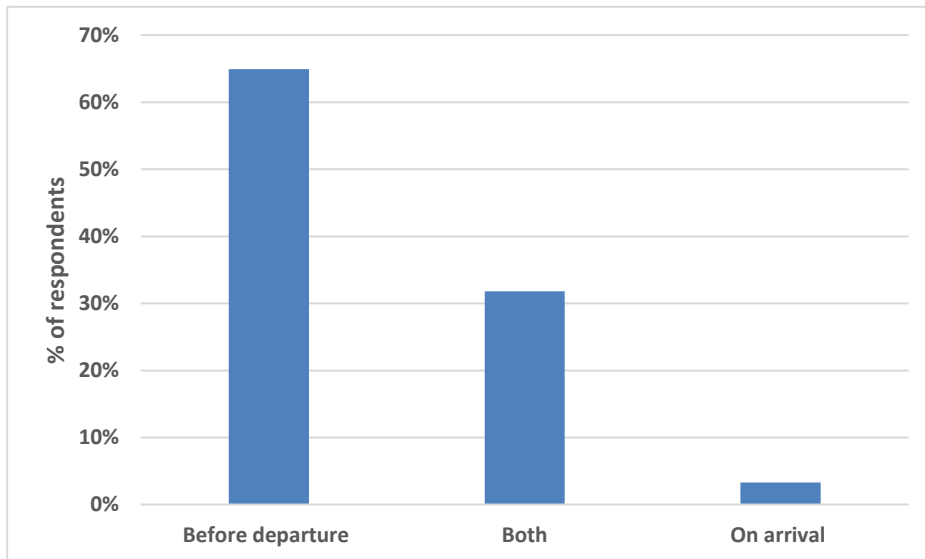
We selected four main issues; Where the test should be taken (on departure, arrival or both); How long the process should take (test and delivery of results); Who should pay and if it was the passenger, how much would be acceptable.

³ This is inevitably a combination of those who don’t believe anything is necessary as well as those who don’t believe any of the options will give them confidence

⁴ https://www.easa.europa.eu/sites/default/files/dfu/EASA-ECDC_COVID-19_Operational%20guidelines%20for%20management%20of%20passengers_final.pdf

⁵ <https://store.aci.aero/wp-content/uploads/2020/05/ACI-Airport-Operations-Business-Restart-and-Recovery-May-2020.pdf>

Chart 2 Location of Covid-19 testing

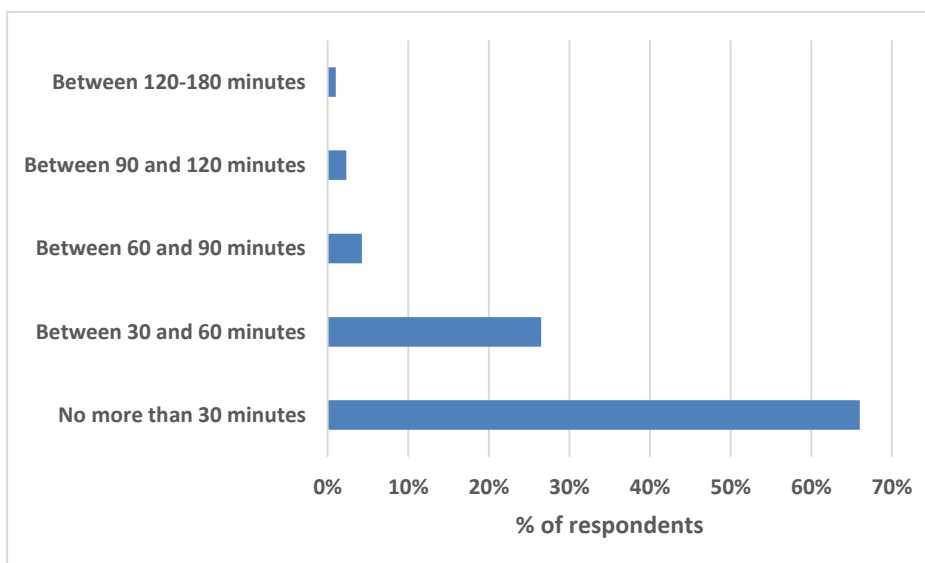


Source: CTAIRA

As chart 2 shows the majority, 65%, responded that the test should be undertaken on departure; however, 32% thought that there should be a test at both ends of the journey. If such testing becomes mandated as part of a set of international protocols then there are clearly significant implications for airports and airlines and not least where transfer traffic is an important if not significant element of their business model.

We then asked how long the process should take from the test (but perhaps more accurately arriving to have the test) and receiving the results.

Chart 3 How long should the “test cycle” take?



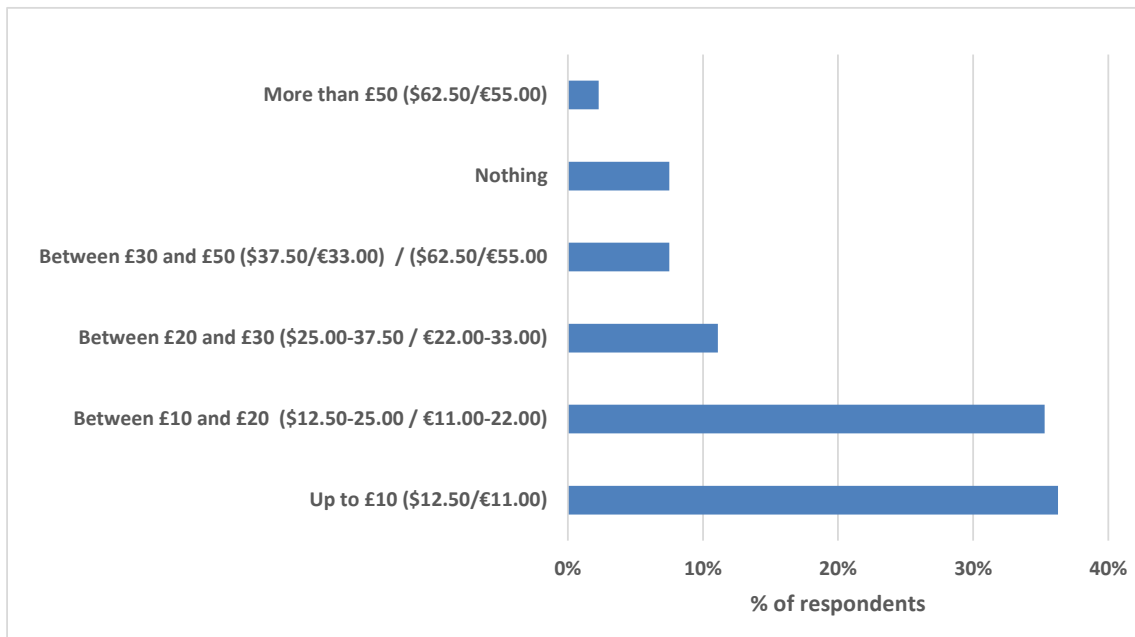
Source: CTAIRA

As Chart 3 shows some 66% of those thought that it should take no longer than 30 minutes with some 26% suggesting that between 30 minutes and an hour would be acceptable. This is an outcome which has implications not only in respect of the test chosen but also for the on-site capacity for both testing and to produce the results where this is a combination of physical space and also the number of “testers”; resolution of these issues clearly has implications for the passenger throughput at an airport. Beyond this there is also the question of how to deal with passengers on arrival if there is a testing or quarantine regime that has been mandated.

We then asked who should pay for the test; some 46% of the respondents thought that it should be governments with 39% in essence accepting that it should be the passenger. The other options were related to airlines (where undoubtedly it would be recovered through the fares) with 10% and airports 5%.

If indeed it was the passenger who was required to pay, we asked how much would be seen as an acceptable additional cost; the data in Chart 4 shows that some 36% would be prepared to pay up to £10 for a test and 35% between £10 and £20.

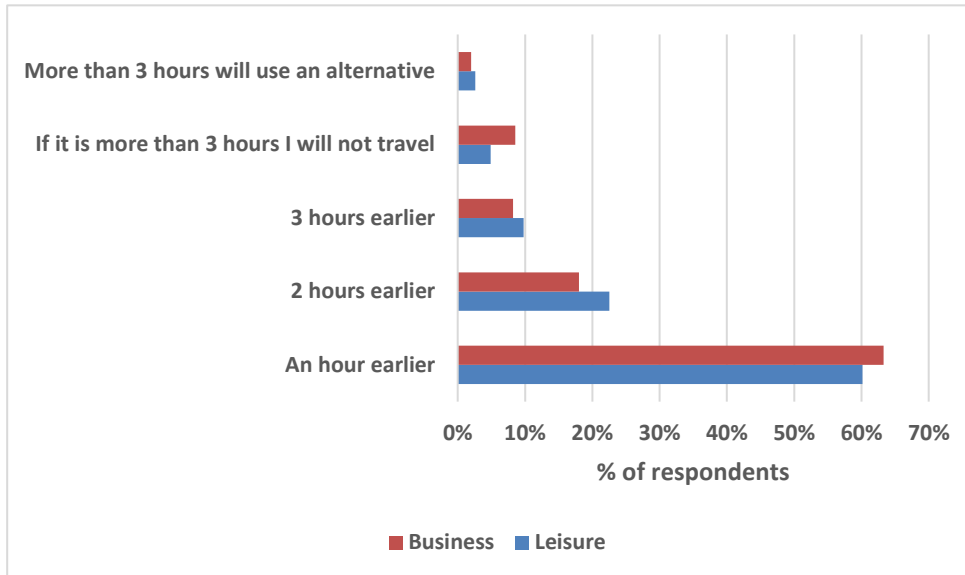
Chart 4 How much should passengers pay for an airport Covid-19 test?



Source: CTAIRA

We were also interested to see what the reaction to increased check in times, associated with testing, would be on both leisure and business passengers in the case of short haul flights (up to 3 hours) and whether or not, if there was an increase in check in time of 3 hours, they would still travel.

Chart 5 How much earlier am I prepared to arrive at the airport for a short haul flight vs. pre Covid-19?

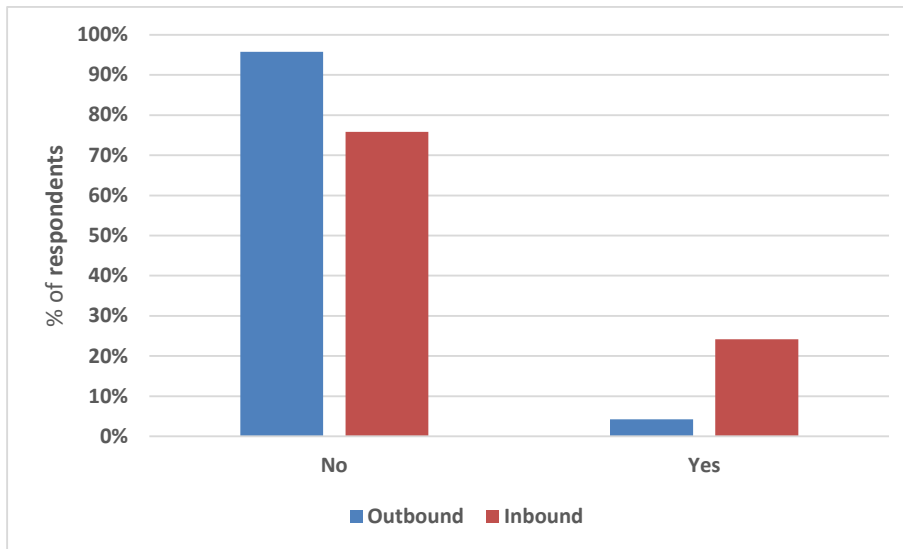


Source: CTAIRA

The responses suggest 63% of business travellers would still travel if required to turn up at the airport an hour earlier than was the case pre-Covid-19 days compared with 60% of leisure travellers. Unsurprisingly a greater percentage of leisure travellers were prepared to arrive more than an hour earlier (33% vs 26%) and also where fewer leisure travellers would not travel or would seek an alternative if the additional check in time was more than 3 hours. Turning this around it suggests that if check in times were increased by more than an hour, to accommodate testing, there could potentially be a significant loss of passengers.

Generalised or country specific quarantine provisions have also become an issue. Here we were interested to learn of what impact on travel plans might have if leisure travellers were required to go into a two week quarantine period when they arrived at their outbound destination and what the difference might be, if any, on their return home; our focus was on leisure as we have assumed that quarantine is even more incompatible with business travel.

Chart 6 Will I still travel for leisure if I have to enter a 2 week quarantine period at either my destination or returning home?



Source: CTAIRA

The conclusions from the data in Chart 6 are clear on terms of the impact that in this case a two week quarantine requirement will have and are unsurprising. However, it would appear to add some strength to the view that within the leisure sector, visiting friends and relatives (VFR) travel may be a key component of the recovery in the initial stages.

Concluding remarks

This survey has provided some most useful insights on a number of issues across a number of the key issues around the re-start of the aviation and wider travel industries; thank you to those who completed the survey; please look out for the next one.

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