

Getting them to fly

ACI Africa Webinar
19 August, 2020

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Key questions to be addressed today

What is your opinion?

1

What are the main needs of passengers during and after the crisis?

2

Under which circumstances will airlines return to airports?

3

What framework must governments provide?



Agenda

1 International perception - Covid-19 on the African continent

2 Connecting the dots - The airport environment

3 Adapting to the new normal - Airport passenger journey

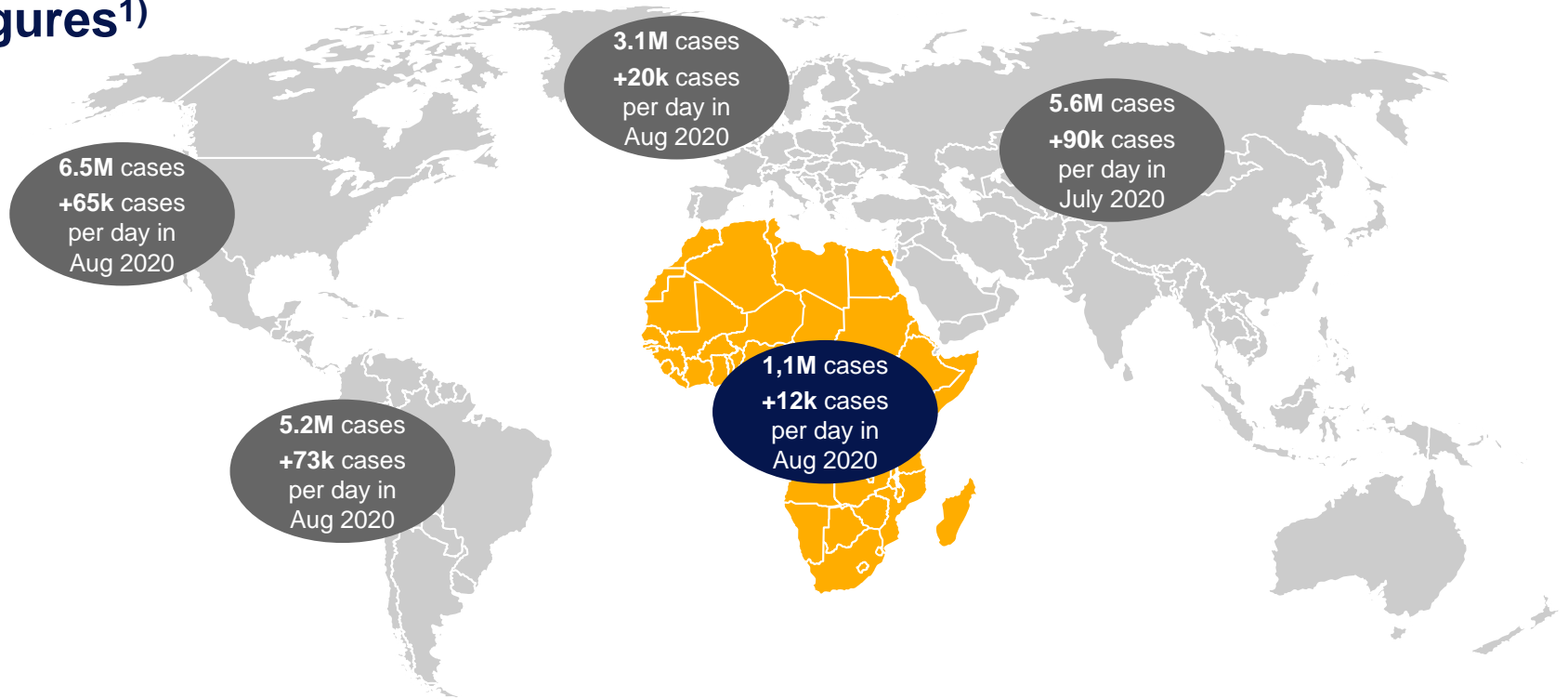
4 Restoring and growing - Airline re-attraction

5 Creating the right framework - Government collaboration

6 Lessons learned



Global hotspots of Covid-19 have been shifting from Asia, via Europe to the American continents, while Africa is reporting the lowest figures¹⁾

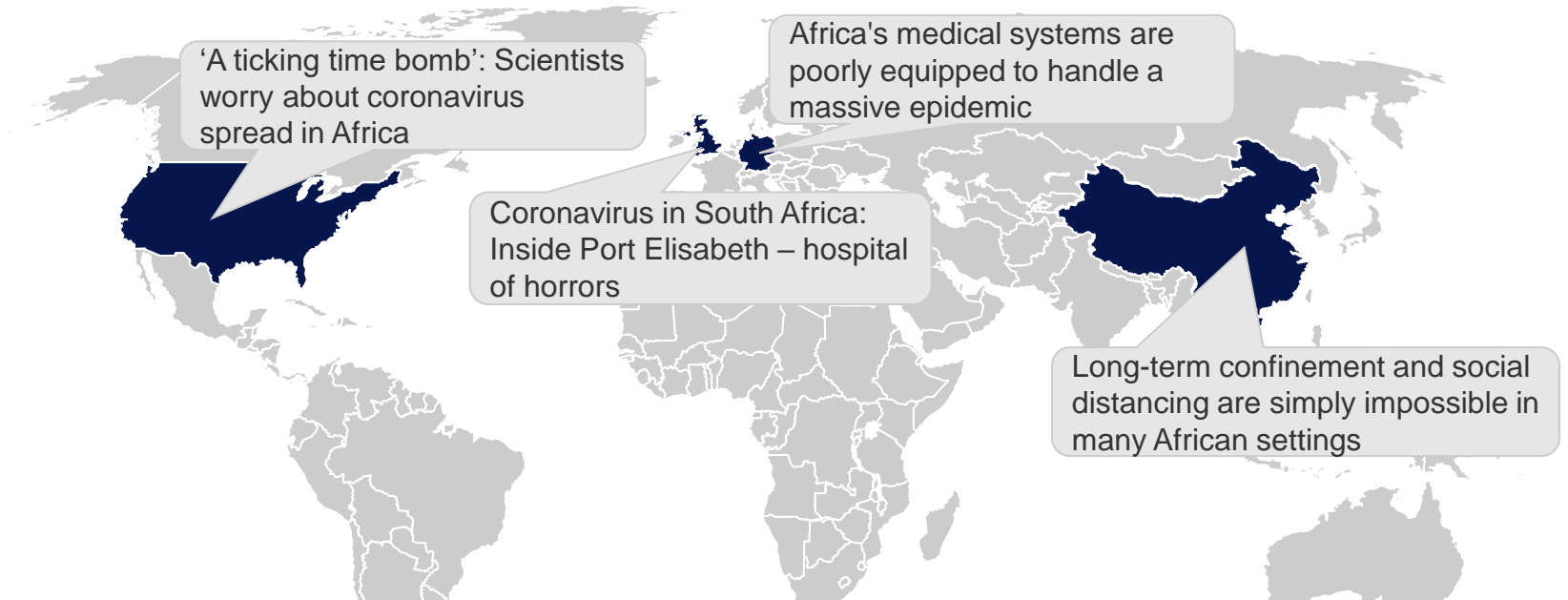


Notes: Use map for illustration purposes only (no liability assumed).

1) All figures are based on the date 15th August 2020 from <https://www.worldometers.info/coronavirus/>



However, the general perception of Africa dealing with Covid-19 is not aligned with worldwide infection figures



In reality, Covid-19 figures are rising at slower speed compared to most developed countries, which the world is unaware about!

Notes: Use map for illustration purposes only (no liability assumed | 1) <https://www.sciencemag.org/news/2020/03/ticking-time-bomb-scientists-worry-about-coronavirus-spread-africa> | 2) <https://www.bbc.com/news/world-africa-53396057> | 3) [https://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS_BRI\(2020\)649421](https://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS_BRI(2020)649421)



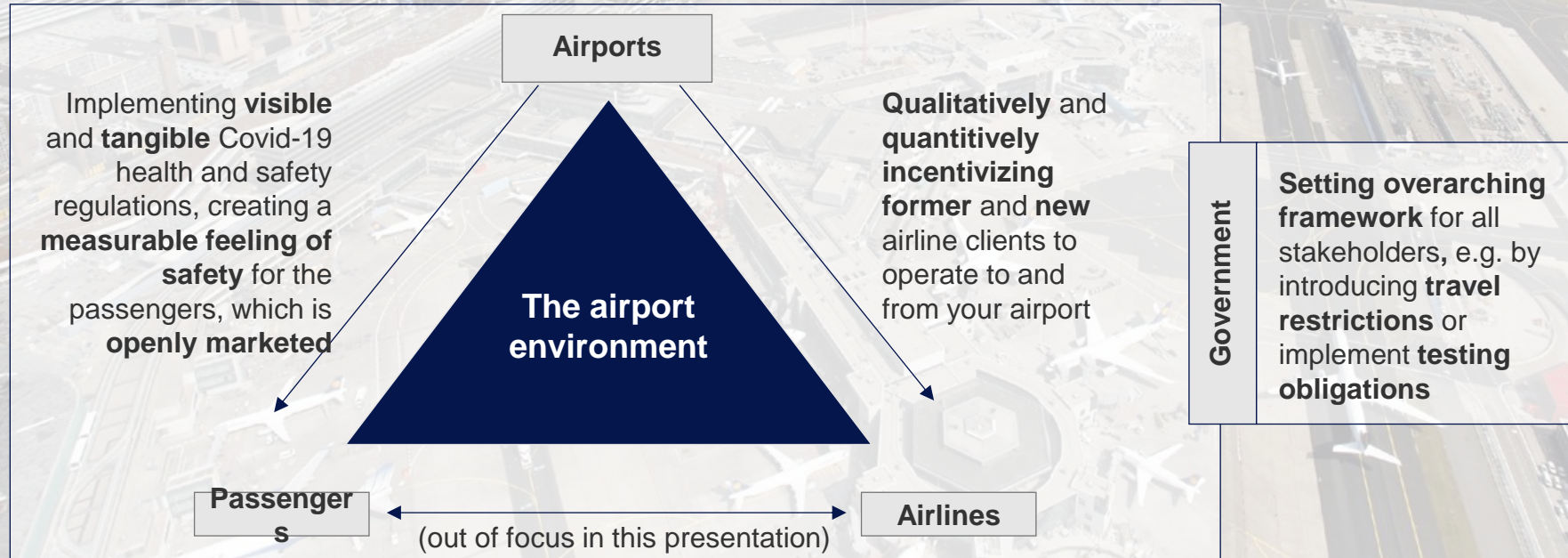
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Airports need to satisfy both, airlines and passengers, to remain attractive, whereas the government defines the overarching framework

The airport environment triangle



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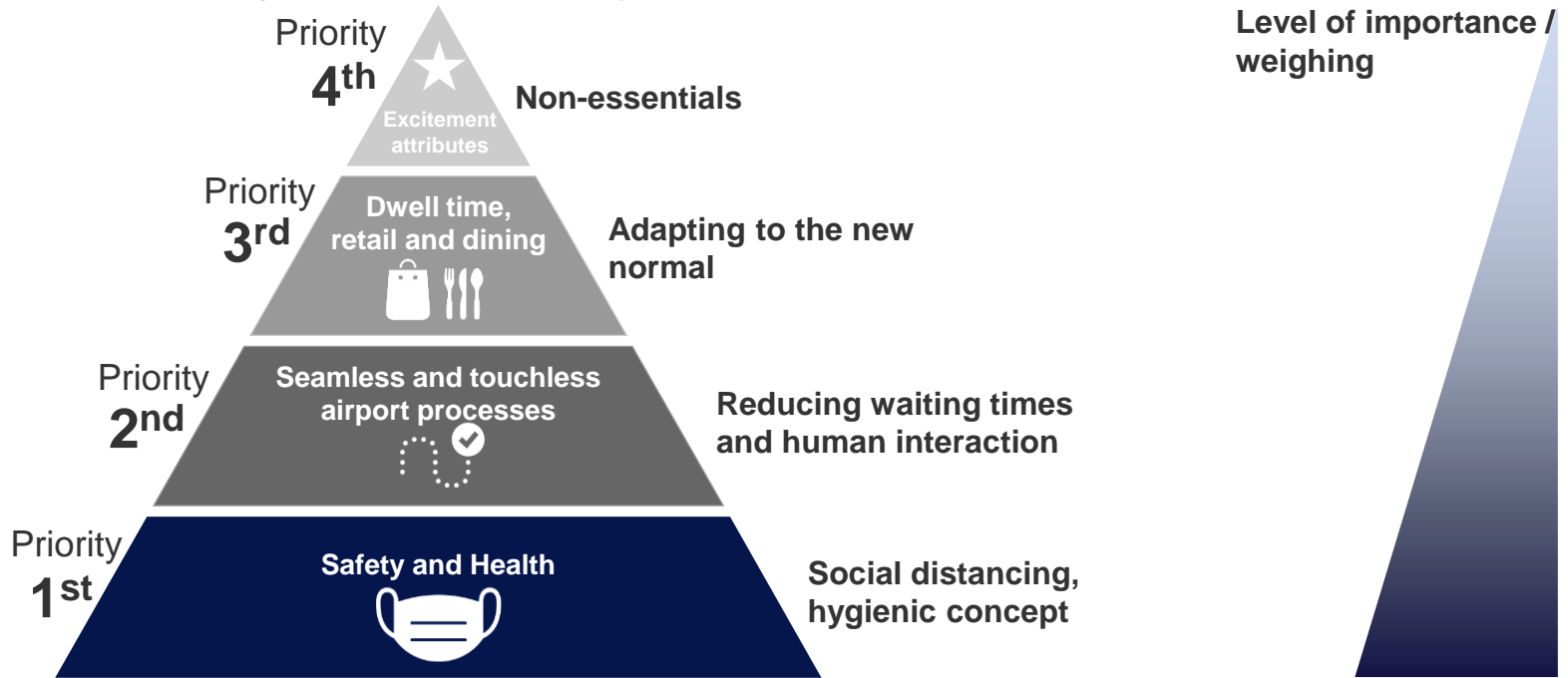
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“Get your basics right” – in times of Covid-19, passengers are looking for a safe and seamless journey and not for dream castles

Covid-19 Maslow’s hierarchy of needs – passenger view



The airport is responsible to apply the minimum of required standards and can distinct itself by making its basics tangible for its customers



Utilizing all communication channels, even in collaboration with the airlines, to inform passengers on new measures and increase satisfaction

Off-airport

Passenger Journey



What can airports do?

- **Mobile solutions** via applications or internet presence, **informing passengers** on
 - **Bookable time-slots** for check-in and security lanes
 - **Peak times** and current waiting times

Resulting passenger perception

- **Raising awareness** on Covid-19 measures implemented by the airport, increasing the feeling of safety for the passenger
- Enhancing options for passengers to **pre-plan their airport journey**, by booking **individual time-slots at bottleneck touchpoints**

Real-life examples

Manchester Airport (UK)



- Online booking engine, run on the airport website for passengers to select their flight and preferred time to reach the security checkpoint
- Separate lanes for pre-booked passengers reducing queueing times



Pre-book your free security slot

For additional reassurance pre-book your free 15 minute slot in a dedicated security lane.

[Book your slot >](#)



Self-service devices have already been applied worldwide, now being complemented by the usage of AI

Check-in / bag-drop

Passenger
Journey



What can airports do?

- **VIP Service** collecting your bag and providing boarding pass at home
- Increased **self-service offer** to foster the **touchless journey**
- **Usage of artificial intelligence** at passenger check-points such as check-in or bag-drop

Resulting passenger perception

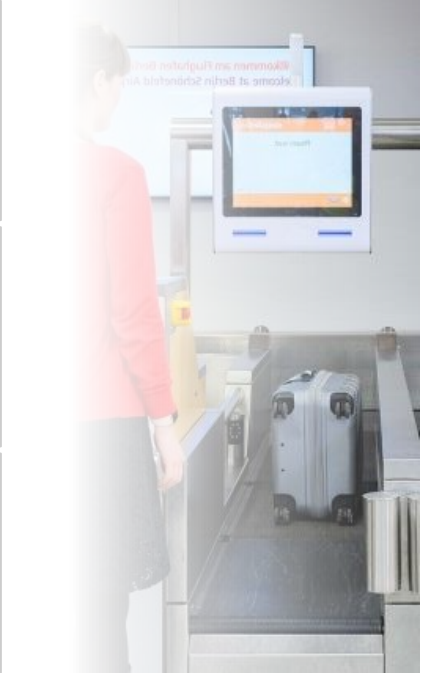
- **Minimizing human interaction** due to self-service devices replacing a staffed check-in counter and artificial intelligence providing direct customer support in form of a robot
- **Shorter queues and faster process times**, enhancing the feeling of safety

Real-life examples

Munich Airport (DE)



- AI robot “Josie Pepper” is in use in T2 of Munich airport check-in hall since 2018, answering questions of passengers regarding the self-service process or way-finding



While human interaction will never be eliminated from the security checkpoint, innovative technology can increase throughput and safety

Security screening

Passenger
Journey



What can airports do?

- **Automated security screening tunnel**, identifying potential threats based on movements
- **Reducing physical interaction between staff and passengers** to secondary searches only

Resulting passenger perception

- **Shorter queues and faster process times**, enhancing the feeling of safety
- **Level of safety remaining the same**, as human interaction will always be required by society at this touchpoint

Real-life examples

Los Angeles Airport (US)



- State-of-the-art security technologies in testing phase since 2018, reducing the need for passengers to take-off clothes and be secondarily searched, while raising security level standards



By reopening restaurants and shops, passengers will quickly find their way back to normality – however, hygienic regulations must be observed

Terminal dwell time

Passenger Journey



What can airports do?

- Enforce **social distancing** in waiting areas by physically blocking seats, distribute passengers in less frequent terminal areas, e.g. via signs
- Ensure opening of food courts and retail spaces for dining and shopping

Resulting passenger perception

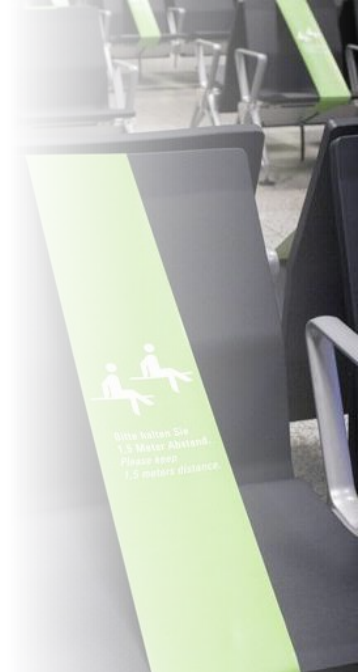
- Strict adherence to hygienic measures by staff **and** passengers has positive effect on well-being of passengers
- Food courts and retail stores contribute additionally to an enjoyable stay (in Covid-19 times, becoming an excitement attribute)

Real-life examples

Frankfurt Airport (DE)



- Sitting too close is effectively physically prevented by using tension belts



The urgent necessity for a touchless passenger journey through the airport contains the opportunity to upgrade ground handling facilities

Boarding

Passenger
Journey



What can airports do?

- Implement **biometric boarding solutions** which enable passengers to board the aircraft touchless
- **Boarding frequency** can be **lowered** to ensure social distancing during boarding process

Resulting passenger perception

- **Hassle-free boarding process** for passenger and staff
- Fostering **touchless journey** as boarding pass scan is no longer required

Real-life examples

New York (JFK) / Boston Airport (US)

- Biometric boarding devices have been implemented and tested successfully



With VIP service offers, additional disinfection treatments for luggage and delivery, passengers are guaranteed maximum safety on arrival

Arrival

Passenger
Journey



What can airports do?

- Offer **disinfection of belongings** (using a disinfectant liquid or UV rays)
- Offer official meet & greet **VIP service** to passengers (fast track)
- Use of **thermal checks**, offer paid COVID-19 tests on arrival

Resulting passenger perception

- Most travelers will stop travel, if quarantine on arrival is imposed - can be avoided through a negative COVID-19 test
- Provide passengers maximum safety on arrival

Real-life examples

Vienna airport (AT)

- VIP Meet & Greet service



In the absence of a globally recognized vaccine, departing passengers may require a pre-flight Covid-19 test

New business area – airport corona test center

Passenger
Journey



What can airports do?

- **Team up with medical partner and open test facilities**
- Place test **centers on-site**, or in case of space constraints off-airport (incl. bus shuttle or similar)
- Ensure sufficient **testing capacity** for quick communication of results

Resulting passenger perception

- **Easing travel experience**, as most passengers are not aware of where to do a quick Covid-19 test
- **Extending airport journey**, by adding another checkpoint and contrasting itself from the competition

Real-life examples

Frankfurt Airport (DE) / Dubai (UAE)



- Container in front of the T1 departure hall since June 2020, where passengers can receive the outcome of their test within 2-3 hours
- Free test center upon arrival in Dubai for all passengers entering UAE



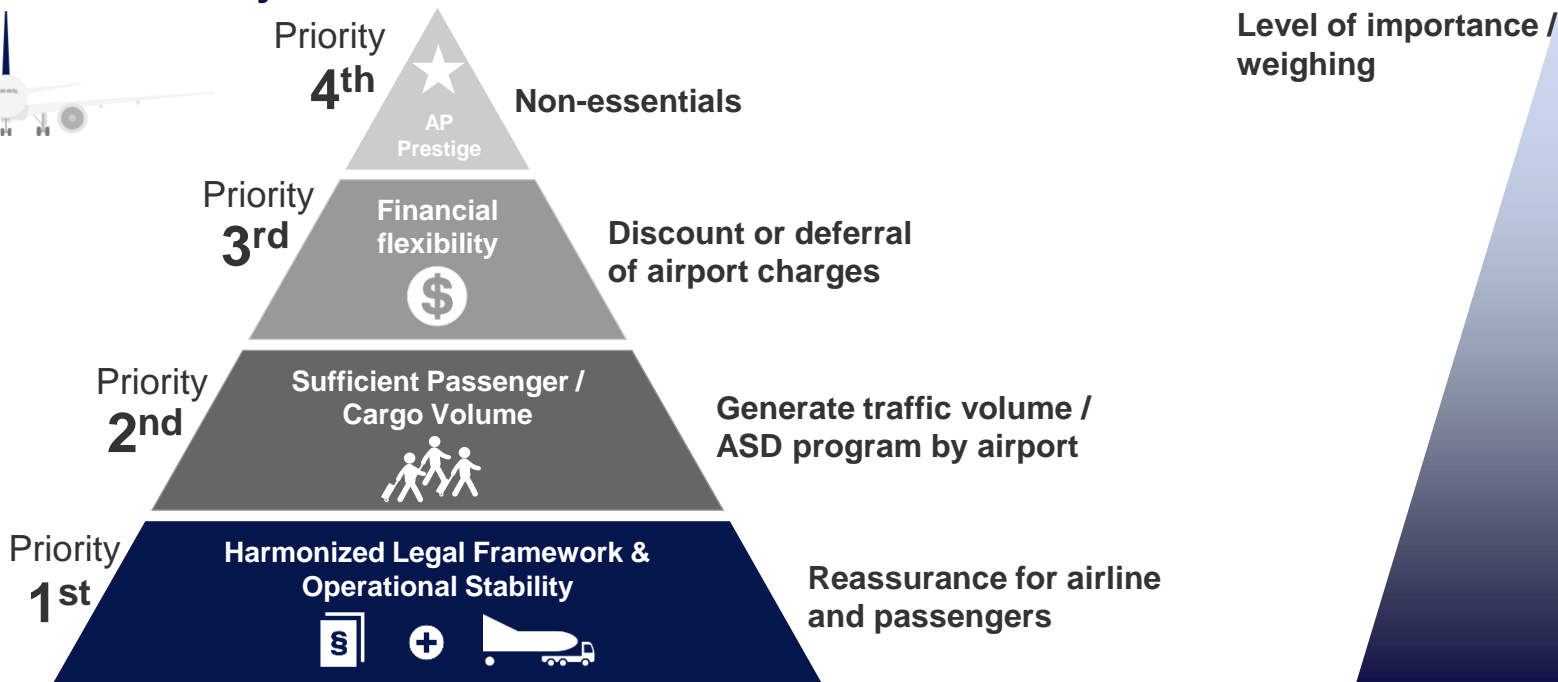
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In times of uncertainty, airlines increasingly seek planning security through consistent government regulations and reliable airport ops

Covid-19 Maslow's hierarchy of needs – airline view



Recently introduced, airports can have their processes health-certified by EASA and ACI to create additional confidence for airlines

Harmonize travel regulations



- Airlines require a **harmonized, consistent and transparent travel regulation landscape** for passengers, crew and cargo – in case of adjustments, **sufficient transition time is provided to ensure compliance** with the rules *(details see next chapter)*

Certify airport health standard (EASA/ACI)



- EASA initiated test program to **certify airports to comply with all Covid-19 health and safety regulations** on the highest level, already including 5-star airport Munich (DE)
- ACI introduced a similar program, called the **ACI Airport Health Accreditation Programme**
- Target is a **globally united certification** for airports excelling in health and safety standards

Ensure operational stability (Example: BRU)



- Swissport Brussels** filed for **insolvency one week prior to operations resuming** at BRU
- Within **two weeks**, Brussels airport managed to **tender and contract and short-term concession agreement** to secure operability of the airport

Brussels Airport ground handler declares bankruptcy 7 days before flights resume

Monday, 08 June 2020

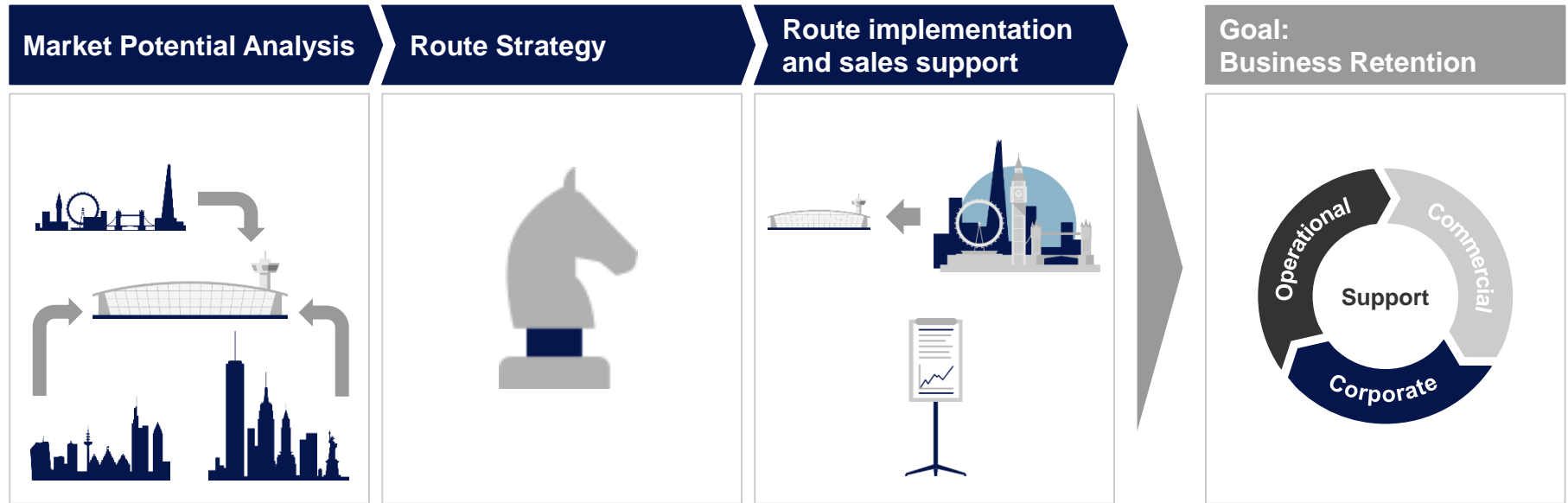


Alyzia SAS gets a 6-month temporary ground handling licence at Brussels Airport

Monday, 08 June 2020



ASD continues to support airports in retaining business and shaping the airport's network for the future



In order to **stay ahead of the curve** and turn current issues into **new opportunities** airports need to **react quickly**. ASD can support by taking current factors into consideration and **adapting services** accordingly.



Having set the scene for air traffic to ramp-up again, airlines will still be in financial troubles, making it a prime incentive lever to attract new clients

Landing fees

- Major aeronautical revenue stream for most airports
- **Can be key lever** to incentivize airlines to operate to certain airports, especially in case of alternative choices
- Example: Chinese government **reducing all airport landing fees by 10%**, as well as **waiving all parking fees**

- **Cover marketing costs** of the operating airline in the airport's country

Marketing

Handling fees

- **Bundling with ground handling** (package), if airport offers ground handling services by its own
- Otherwise **collaboration with ground handler** required to reduce fees similarly

- **Discount on crew hotels** for layover flights
- **Waiving overflight fees**
- Providing the ability to **defer payment**

Others

Financial incentives to attract airlines



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Nevertheless, a harmonized approach for border reopening is essential -it is the industry's task to remind governments of their responsibility

Alignment of travel regulations and reopening of borders ...

... within African Union



- African Union aimed to agree on a coordinated approach, however, **no joint agreement** with the governments could be reached
- Scattered entry regulations **complicate and discourage travelers**
- **Missing planning reliability** for airports and airlines



... within European Union



- Members of EU committed to a **joint coordinated reopening of borders**
- Aligned entry regulations with **few exemptions** had been achieved
- Airports were **successfully** able to prepare operations for ramp-up as **increase in passenger numbers proved**

July 2020

- New travel regulations were re-introduced within parts of the EU, resulting in **inconsistent regulations again**
- ACI Europe, Airlines for Europe and IATA **addressed the issue immediately** and have called for a **return to a harmonized approach**

Harmonization is required not only on an organizational level, but **on an international level**. African states need to **take the initiative** and further pursue regulatory **harmonization for air travel during Covid-19 pandemic on a bilateral basis.**



Governments should acknowledge Covid-19 tests as a substitute for quarantine and review travel restrictions on a regular, fact-based basis

Four pillars of an effective regulatory travel framework

1) International Harmonization gives reassurance to airlines and passengers



2) Reassess travel restrictions

- **Consistency and transparency is key** for airports, airlines and passengers
- Travel regulations should always be imposed **in line with WHO requirements** and **fact-based**
- General **blacklisting** of countries should be **avoided**, **no mutuality based regulations** due to lack of objectivity



3) Intensify Covid-19 testing

- Airports should implement **on-site test centers** for passengers and crew who have no health certificate at hand
- A negative test result can **replace a mandatory quarantine**
- Test centers must **provide sufficient testing capacity** to be able to cope with rising passenger demand



4) Avoid general quarantine

- **ACI calls for replacement of mandatory quarantine with Covid-19 testing programme**
- 14-days-quarantine should be only ordered in case of a positive test result
- Passengers and crew should be allowed to carry out quarantine in airport hotels, if required



Today, travel policies on the African continent are still highly fragmented, however, first results of the harmonization efforts are visible

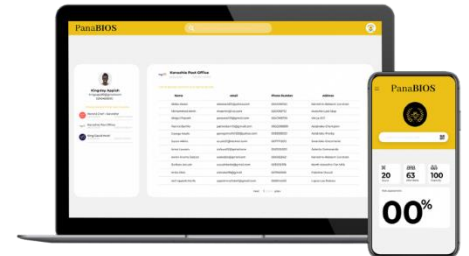
Implementation of harmonized institutional guidelines

- Regional institutions like ACI Africa and AFRAA are **very well aware** of the **need of an standardized approach**
- In May 2020, ACI Africa published a **“Guidance for African Airports Restart”** as a common practice for African airports
- Additionally, AFRAA promotes **ICAO’s CART guidelines** which are applicable for worldwide aviation industry
- **“African stakeholders need to adopt a common African position on CART’s “Take-off” Guidance for a seamless and effective restart of aviation activity”**
 - Mr Abderahmane Berthe, AFRAA Secretary General

Ongoing
Harmonization
in Africa

Cross-border Covid-19 risk assessment and contact

- Newly introduced app **PanaBIOS** allows **risk monitoring** and **contact tracing** of potential Covid-19 cases, supported by African Union
 - Ability to store travel health history data for standardized port health screening
 - Concept similar to already existing apps, e.g. in European countries, however, PanaBIOS has a unique **cross-border functionality (!)**



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Having an aligned and united approach during the ramp-up phase will be key, visually marketing the tangible safety concepts to the

passenger Lessons learned

Marketing tools as a catalyst for passenger demand

- Adapting to a “new normal” with a variety of health and safety regulations is already a mandatory fact for all airports exiting the crisis
- Key lever will be the success in raising awareness of measures implemented and creating a tangible feeling of safety to the passenger

Innovative technologies

- Technological leaps are larger in times of crisis, having developed innovative ways of dealing with the newly imposed social distancing and hygienic requirements
- Procedures and technologies available are ranging from little to high investments
- Individual airport approach required to select the right level of technology

Reaching the global market and harmonizing measures

- Governments are a vital collaboration partner in times of crisis to reach out to the world
- A harmonized intl. regulatory framework is a prerequisite for efficient air travel in future
- Airports need to actively work together with national authorities and engage the media

Get your stakeholders on board

- Only if all airport environment stakeholder are working together, there is a chance to emerge from crisis stronger and leave the competition behind at the starting line



Thank you for your attention

