COVID-19:
A Safe Return to Aviation

Introduction

VHB hosted a second Virtual Roundtable Discussion on June 10, 2020, part of a series regarding the aviation industry's efforts to provide a safe return to an increase in air travel after COVID-19. Participants included industry executives from a variety of aviation leaders, including airport operators, industry trade associations, the Federal Aviation Administration (FAA), Transportation Security Administration (TSA), architects, ridesharing, concessionaires, emergency management, and airport sanitation experts. The discussion followed a passenger's air travel experience from leaving home with baggage and transportation concerns to disembarking at their destination and the potential infrastructure development solutions that are currently being implemented or assessed. The session provided an opportunity to share multiple perspectives from different aspects of the travel journey to develop a clearer vision of our future. The comments below provide a summary of challenges, concerns, ideas, and creative thinking that were shared during the conversation.

Summary

The aviation industry is preparing for a gradual increase in passenger travel. COVID-19 exposed a need for consolidated industry standards at every step of the journey, including curbside pick-up, terminal cleaning, and passenger health screenings. There will be creativity in cooperation. **The term "The <u>Now</u> Normal" was introduced, which reflects the adaptations industry partners must undertake in the uncertain world of a pandemic.** With stay-at-home orders lifted, airports and airlines are expecting discretionary leisure travel for checking on elderly relatives or scheduling late summer vacations. Businesses are starting to schedule meetings for fall, but associations are not booking for annual gatherings.

Since VHB's last Aviation Roundtable in April, the GDP has contracted from 1.7-percent to 4.8-percent. TSA throughput is a big focus based on the airport security checkpoint being the most critical component for airport processing in terms of throughput and processing times. Week-over-week growth has fluctuated. **The industry saw 2.5 million passengers for June 1, versus 17 million at the same point in 2019.** How long will it take for the U.S. to get back to these numbers? The industry is looking closely at both the passenger experience and the airport experience. Peak hour is down significantly less than traffic volumes but is still critical when it comes to planning and design as peaks are still evident. There is still a demand for gates, which has implications for planning processes. Airlines will pull traffic into major regional hubs for the near term. Travelers will have more connecting flights for the foreseeable future.

The industry is examining technologies that will eliminate touchpoints and crowding, such as leveraging a system like Disney's FastPass+ model of appointment times via phone apps, and further sanitation measures such as ultra-violet (UV) baggage tunnels or disinfectant spray devices within those tunnels/systems. **An international crisis like COVID-19 comes with an important public health component which will likely play a larger role at the forefront of planning and communications.** Although the future of aviation travel remains uncertain, restoring trust with apprehensive travelers is paramount. Participants from different market sectors in aviation shared the following perspectives:

Airport Access

The industry must grapple with understanding that the air travel journey for passengers starts at home. **Before COVID-19, roughly 25-percent of air travel passengers used transportation network companies (TNC) to get from home to airport; expect those numbers to shift now.** Will travelers choose to drive solo instead of using public transportation, calling a taxi, or rideshare? The entire airport access sector is making certain both passengers and drivers feel safe, through actions such as providing PPE and helping drivers with costs for masks and cleaning supplies. The industry needs to think about the curb experience. People huddle at curbs for shuttles, taxis, and rideshares despite adequate airport wayfinding. How do airports provide social distancing at these points? The industry must pay new attention to where vehicles meter and where people wait for rides. Industry collatoration to address a safe passenger journey will be important.

Baggage

The baggage industry is studying how bags are handled at each step of the journey. What are passenger, bag handler, and subsequent TSA confidence levels in baggage safety measures along the way? A passenger's bag is touched by seven to 10 people each trip. The trend was already moving toward self-service with bag drops and bag retrieval. **Treatment of baggage via ultraviolet (UV) tunnels is a top consideration.** UV tunnels can be introduced in various places, including at the load belt and resolution area. The industry is also concerned about planning involved in these systems, and whether there will be a shift in checked versus carry-on baggage. Airlines could reconsider baggage fees and try to reduce congestion which would require significant lobbying.

Security and Screening

Most travelers are doing so now out of necessity not desire. TSA can be a problematic point in the system of passenger air travel. **Agencies are cognizant of the opportunity to accelerate transformation and get it right.** Big ideas include reducing touchpoints (travel document checkers could be e-gates and self-identification with someone as a monitor), removing extraneous tasks like employees asking passengers to take items from pockets, and adding remote screening rooms to remove x-ray screeners from lanes. Airports have implemented some of these ideas already, but we will see standardization as the approach needs to be systematic. It is doubtful passengers will trust the enclosed phonebooth version of the Advanced Imaging Technology (AIT). Now flat panel versions can be accelerated. Airports like LaGuardia are experimenting with scheduling times of passenger arrival. **Low traffic means the industry can experiment.** Psychology is a category of concern. Perception of safety is the expected catalyst to bring passengers back to flying. The system can transform from one that shows concern about safety to a system that fundamentally creates a safe environment. UV tunnels and anti-bacterial nano coatings could have an impact. It is important that aviation industry governing bodies (not private industry) seek standardization and independent verification for safety measures and guidance, and then communicate these to the public, as trusted sources for industry information and collaboration.

Terminal Design and Operations

Terminal designers and operators are in a quandy: will the changes made now still be necessary post-vaccine? Airport use trends may be changing. **Regional hubs will see more passengers because of the perceived added levels of safety at these facilities due to smaller crowds.** Regional airports have an opportunity to be proactive and visibly improve confidence of a flying public. Communicating safety is important via wayfinding and signage. Architects are focused on social distancing solutions. Designers are helping clients identify high-traffic locations and technologies for disinfection stations, such as at escalators. Modifying hold rooms is challenging due to the amount of square feet needed per person to maintain adequate social distance. Look for pre-and post-security hold rooms and health screenings at separate entrances. **The industry will need to move past social distancing at peak times as a model because it may not be financially sustainable.** Remember, the current climate is a pre-vaccine world—but things will continue to evolve.

There is a big design overlap between food, beverage, retail, and aviation. **Airport design imperatives will inevitably be pushed down to concessionaire and hospitality.** This is an opportunity to help concessionaires adapt. Planners and architects are exploring new seating options in open spaces like food courts, but also considering their transformation into something similar to an Amazon storefront experience with places to take food items out. Seating and eating are big concerns. If travelers cannot social distance at an airport bar where will they go? Airports will move away from seat clusters. Events like COVID-19 push airport operators to adapt and transform their facilities. Biometrics, self-tagging baggage, and touchless self-boarding are here to stay.

Airport Concessions

Concessions need to be creative and change because the impacts they have seen, which are tremendous, are staying. **Social distancing is devastating to business. The best many restaurants can do is operate at 50% of normal capacity.** Is this still a viable business model? Technology will be key to survival. Food and beverage could move toward adaptable spaces and seating. New technologies on the street are slow to catch-up to the airport, like apps for preordering at coffee houses. Advanced ordering will be more important, but it should come with passenger education and integration into the airport apps, which passengers are accustomed to already.

Airports Operators

Airports are strengthening partnerships with all stakeholders at their facilities to make certain the traveler feels safe. Enhancing passenger perception of safety is important. **Communication with passengers is therefore a big focus point through targeted marketing campaigns to assuage safety concerns and educate the public on the "Now Normal".** When safety features are added, such as UV lighting or hospital-grade misting machines, these changes need to be communicated to the public. Airports are also concerned about their own employees' safety, especially those who assist in processing passengers and baggage. Furthermore, airports are planning for recovery and assessing how their revenues will be impacted by changes in airlines and passenger demand. **Space planning and seating changes could be costly and have a negative effect on the bottom line.** Travel is increasing, with a 50/50 split between business and leisure. At its worst, one large airport reported only 1,500 travelers but is now at 10,000 travelers on June 9. Markets with a large elderly population are seeing passengers fly to check on relatives. Expect families to put off a vacation until right before school starts.

Prior hurricane and pandemic crisis planning, as well as close relationships with emergency management teams, helped in the response. Airports with a robust customer service program can be more agile responding to change at every touchpoint of the passenger journey. Taking the initiative to design signage for social distancing and sharing with airline partners and concessionaires keeps everyone on message. It is important to note that while every airport is different, an industry-wide health and safety protocol will benefit all parties.

Janitorial and Cleaning Services

The pandemic brought about appreciation of essential workers for businesses, many times roles that are underappreciated, such as cleaning and sanitation personnel. The "Now Normal" means safety directives are implemented and updated week by week for health and safety, including cleaning and sanitation measures. This is an opportunity to transform cleaning and sanitation from satisfying passenger perceptions to something that is scientifically measured and managed (think clean room yield managers that measure particles in the air). According to recent reports, surface transmission has not proven to be the most common way of acquiring the virus. **The industry needs to make a distinction and assess resources for cleaning touchpoints versus social distancing implementation.**

Consider reprogramming elevators to stop on every floor to eliminate the need to touch buttons. The industry needs to set standards and clear guidelines about cleanliness in airports and test the quality of the products being used.

Aviation Industry Groups

The International Civil Aviation Organization (ICAO) Council's Aviation Recovery Task Force created recommendations that airports and airlines should consider post-pandemic. Industry think-tanks are separating the conversation of restarting versus recovery. Restarting will be harder than shutting down when the pandemic first appeared. The industry reaction is different from the 9/11 response as this is a problem without a clear endgame or timeframe. The emphasis is on implementing for the "Now Normal" and removing any unnecessary processes. **An important conversation is who will own the post-pandemic health screening and response role, including who owns the biometric journey?** If a passenger screens with a high temperature, who will be responsible for disposition of that passenger? It may not be the case that TSA will be responsible. The U.S. government is having high-level discussions about it. Another priority is alignment of standards for airlines and airports involved in international travel.

Federal Aviation Administration

Federal entities are determining eligibility and have dispersed CARES Act monies to the aviation industry to offset impacts to airport operating expenditures (OPEX) costs due to COVID-19. Reimbursements are already being processed for eligible costs and these will end in October. Federal entities very much appreciate airports using the monies to respond to COVID-19 crisis, but the industry must do so within regular boundaries, which include expenditures generally used for airport revenue. Eligibility is broad but there are grey areas. **The nature of the reimbursement requests could determine how funds are distributed in the future.** For instance, some development projects that provide for everyone entering the airport to get a screening may/may not be eligible. **Future requirements could change to involve technology that solves efficiency issues instead of items that only benefit revenues.** The FAA facilitated distribution of approximately 87 million masks to airports in a collaboration with the Federal Emergency Management Association (FEMA).

Health, Safety, and Emergency Management

The pandemic makes it clear that emergency planning and public health entities need to be called to the aviation industry table more often. They are critical functions of air travel. Emergency management planners are accustomed to pandemic planning and knew that a COVID-19 type virus was a high possibility, with plans in place and conversations about industry standardization at annual conferences. Some airports have been in close contact with CDC coordinators for planning purposes. How airports restart and recover are critical functions. **Emergency management can lead those conversations, help integrate the aviation and public health communities, and move them forward.** Look for more opportunities to educate passengers and let them know that what public health steps are in place at airports and by airlines.

Next Steps: Future Discussions

We want to stay connected! VHB will be hosting more virtual roundtable discussions, connecting varying perspectives across geographies. Future question and discussion around this roundtable topic could include:

» How were CARES Act funds used in your sector and how effective were they?

» What new technologies have you implemented? What is still needed?

» What health and safety protocols have the most impact on passenger satisfaction?

» What does a realistic industry recovery look like in 2021? Further out? Long term plans?

Connect With Our Our Aviation Thought Leaders

Fin Bonset, CM
Director of Aviation Services
fbonset@vhb.com

Carol Lurie, AICP, LEED AP, ENV SP
Regional Aviation Director
clurie@vhb.com