



# Airports' Perspectives on Restart & Recovery

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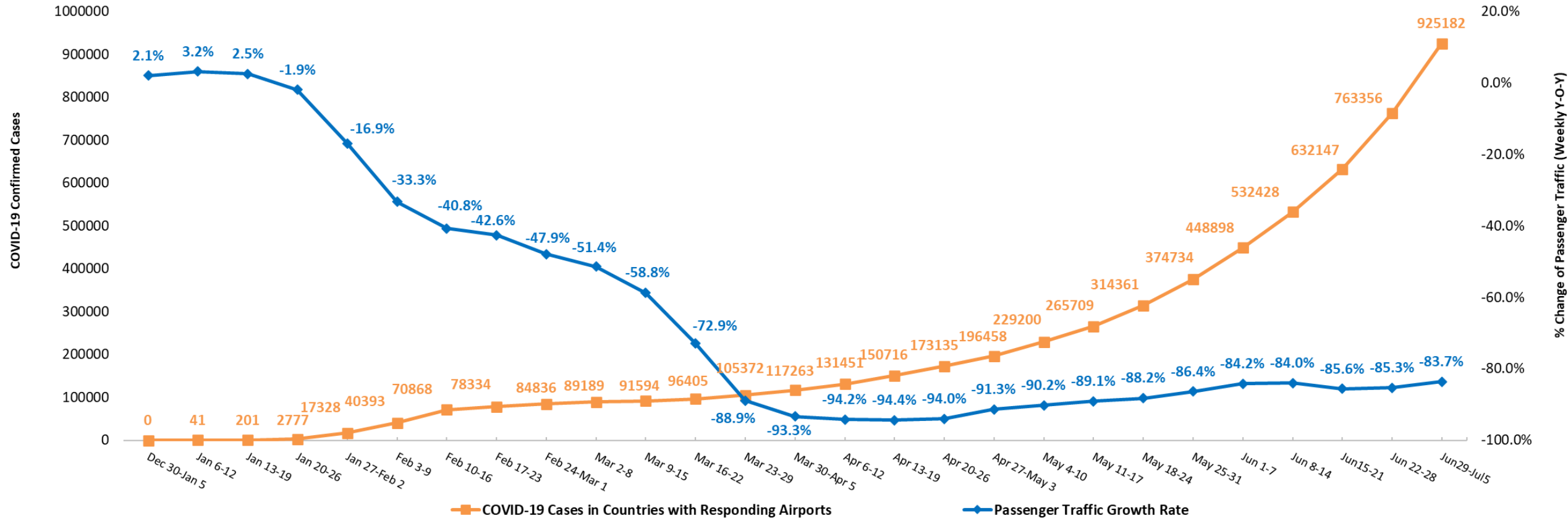
**ACCRPG/4 – 17 July**

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1. Experience and challenges on **restarting & recovery** of air connectivity
2. CART implementation by airports
3. Suggestions for international operations re-start

# WEEKLY TRAFFIC TRENDING (COVID-19): APAC

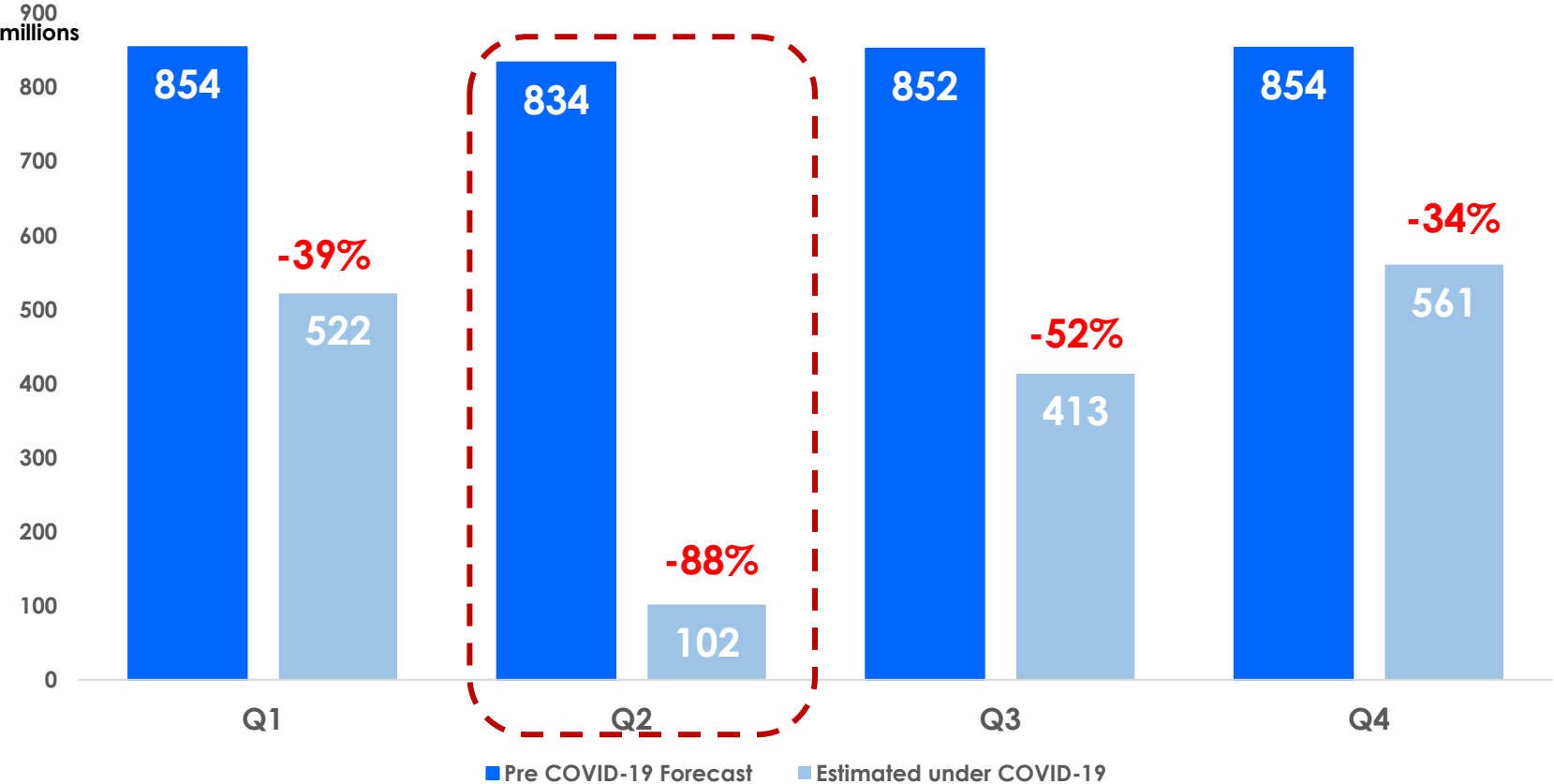
2020 Week 1 – 27  
30 Dec 19 – 5 Jul 20



Source: ACI Asia-Pacific survey of preliminary total passenger traffic data from 29 airports in Asia-Pacific (these airports collectively serve around 31% of passenger traffic in the region) (Note: June 2020 traffic only include data from 27 airports)

# ASIA PACIFIC PASSENGER TRAFFIC 2020

(as compared to the "business as normal" scenario)

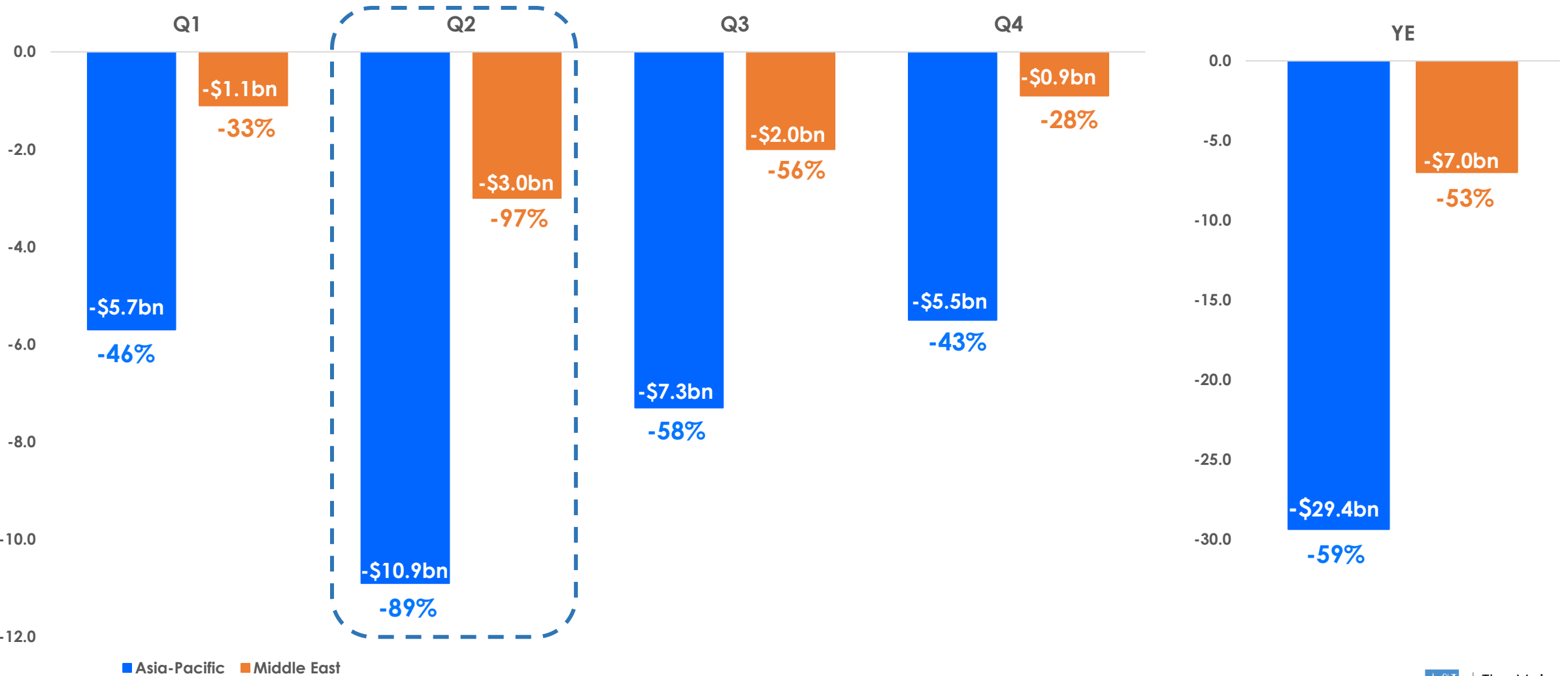


**YE 2020:  
1.8 billion pax  
decline  
-53%**

Source: ACI World estimates, 5 May 2020

# ESTIMATED AIRPORT REVENUE LOSS FOR 2020 (USD BILLION)

(as compared to the "business as normal" scenario)



Source: ACI World estimates, 5 May 2020

# THE MAGNITUDE OF THE DIRECT ECONOMIC LOSS

What does  
USD29.4  
billion in  
losses look  
like?



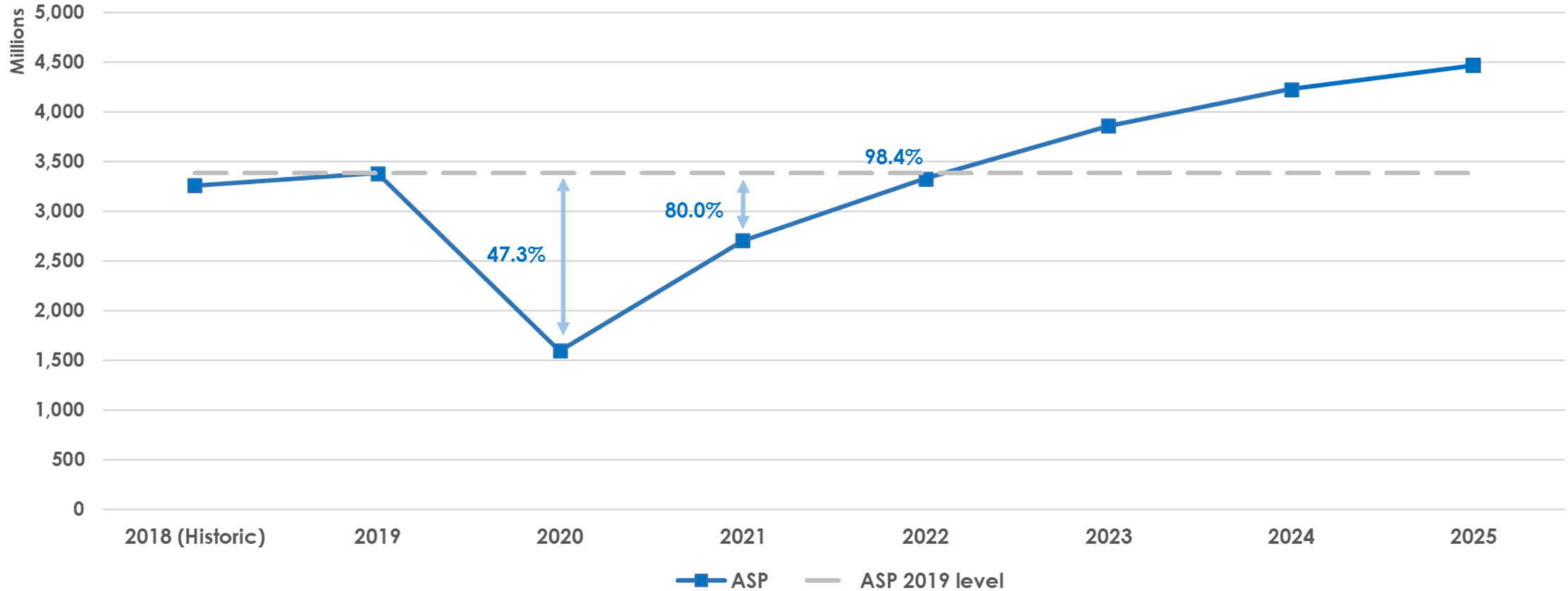
Typical hub airport with over 40 million pax generates **USD 1.3 billion per annum**



Revenues of the 22 busiest hubs in Asia-Pacific completely wiped out

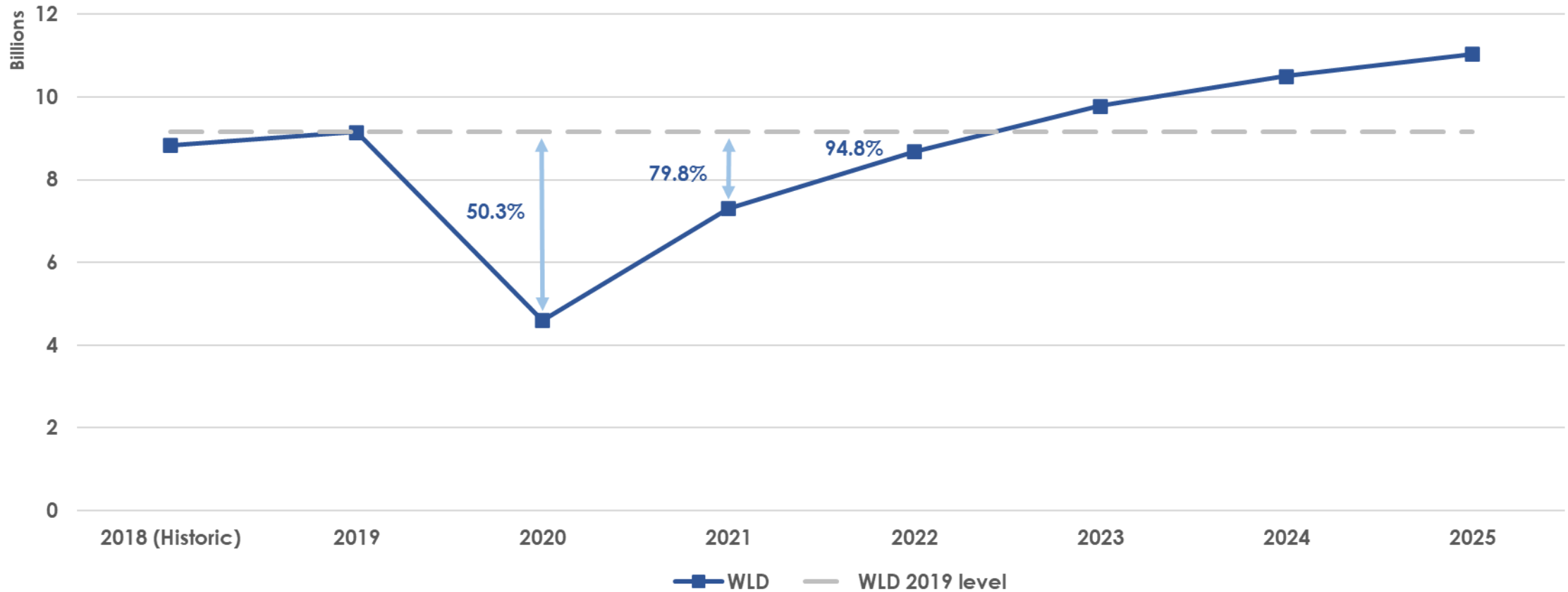
# PAX TRAFFIC IN ASIA-PACIFIC WILL RECOVER TO 2019 VOLUMES IN 2023 ONLY

## Asia-Pacific (preliminary forecast estimates)

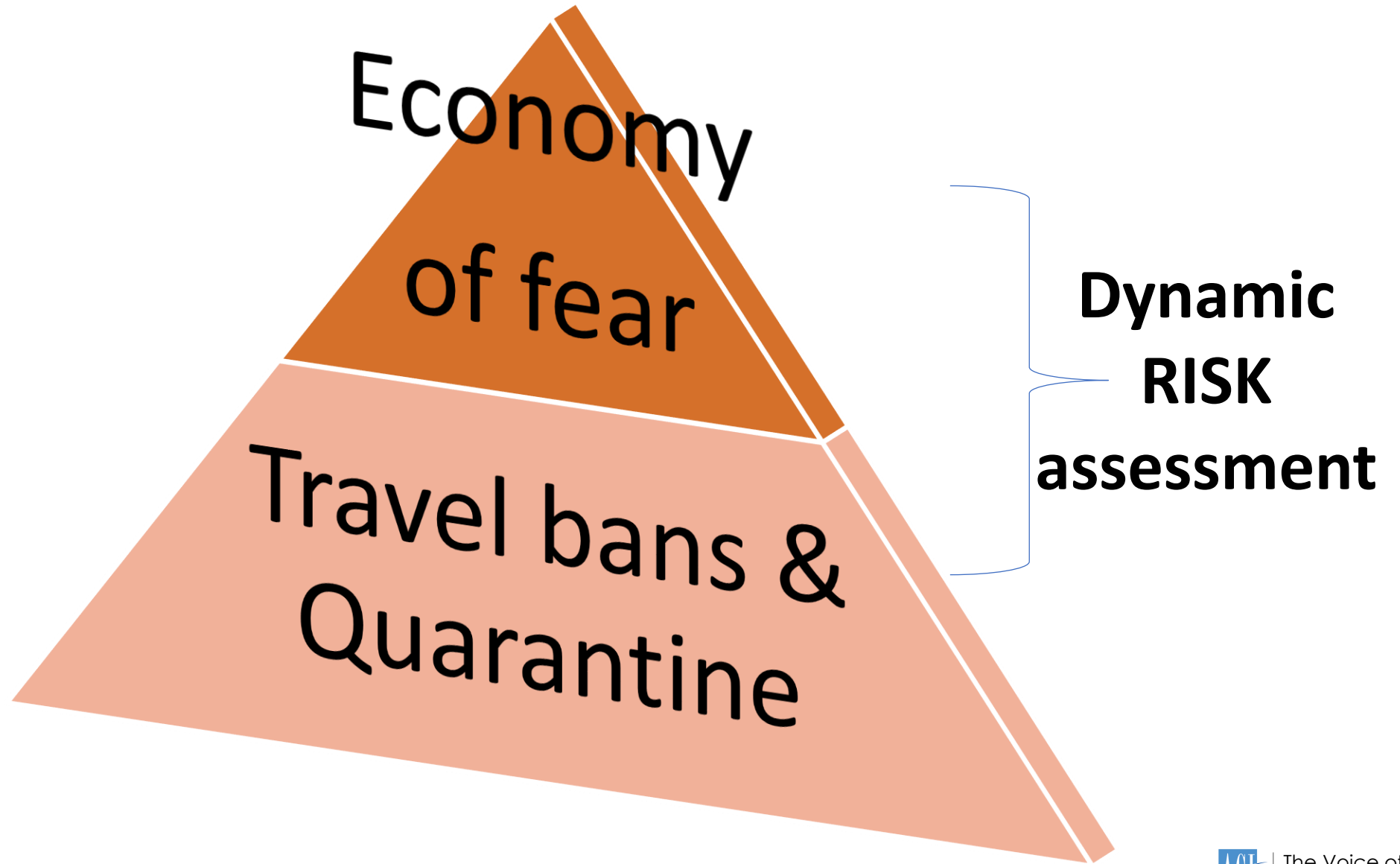


# SHORT TERM RECOVERY PASSENGER TRAFFIC BEYOND 2020

World (preliminary forecast estimates)

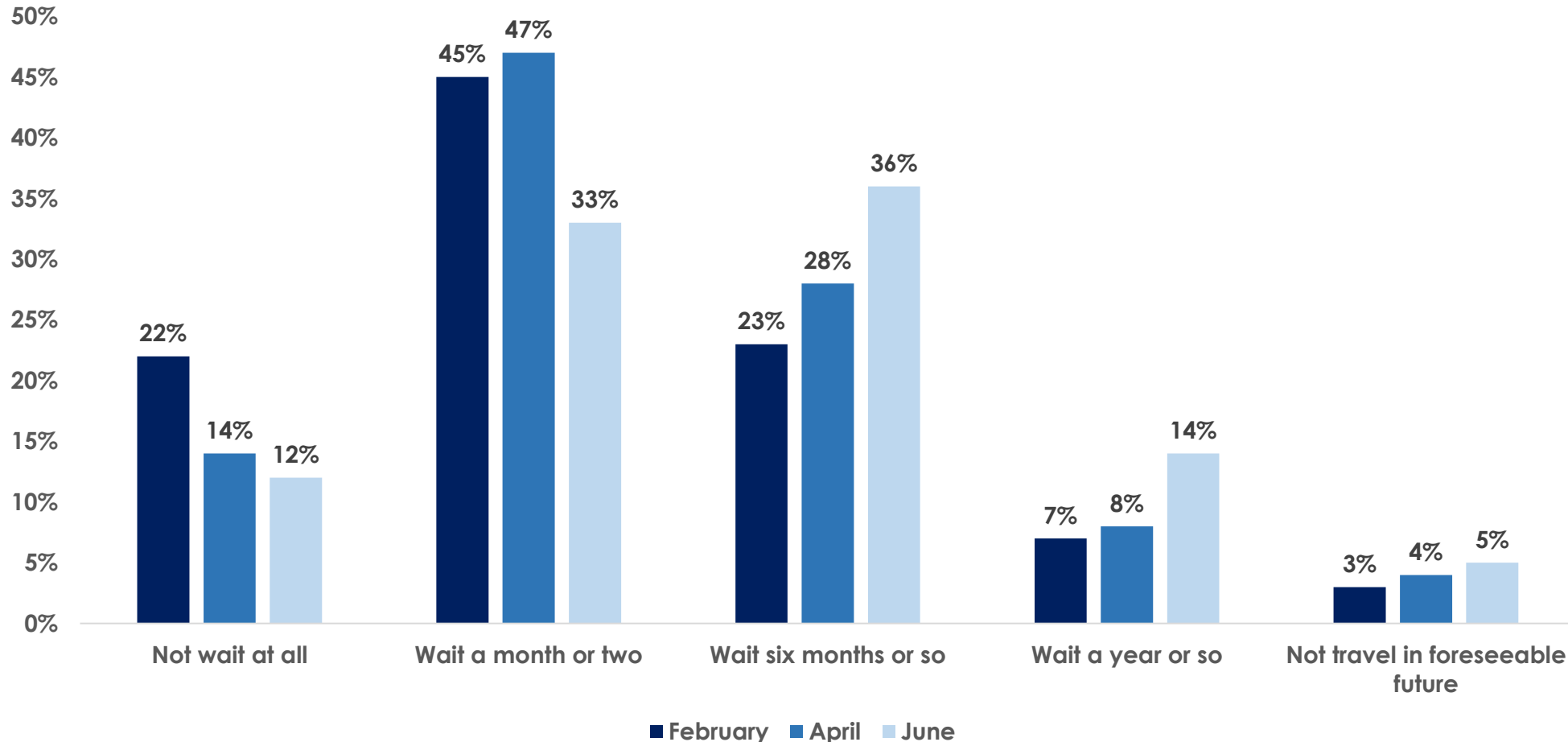


# CHALLENGES OF RESTARTING



# Passenger confidence to post-COVID-19 recovery in air travel

## Returning to travel after containment announcement

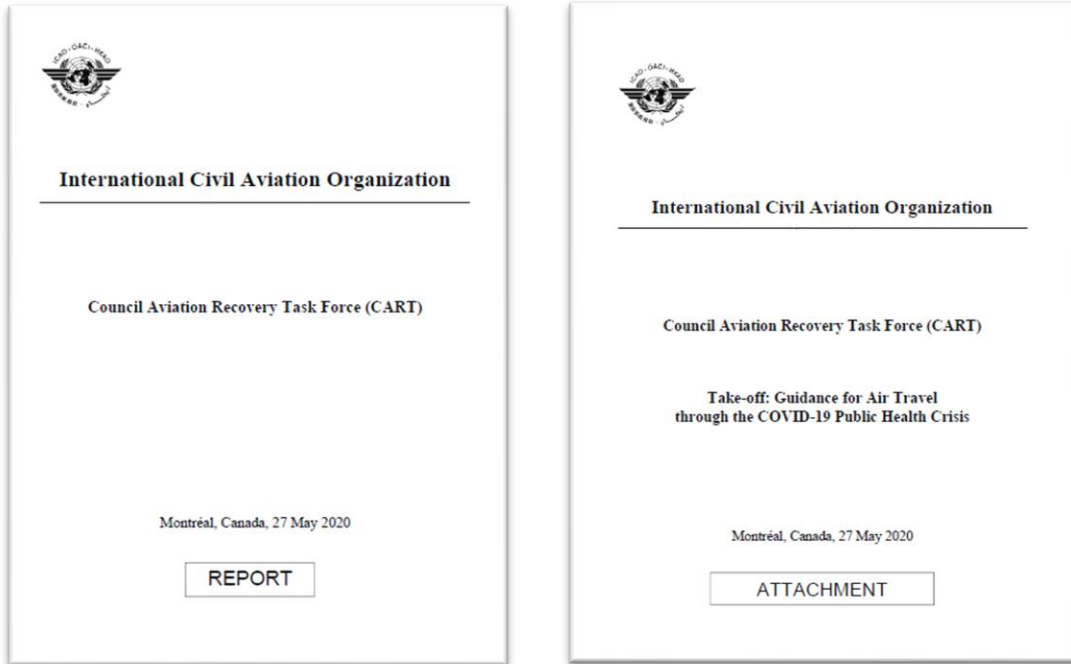


Majority of passenger will likely wait slightly longer than before to return to travel after the containment orders are lifted.

Survey conducted in 11 countries.



# ACI supports harmonized implementation of CART report



CART Report & Take-off guidance



Airports across the region

# THE EUROPEAN UNION AVIATION SAFETY AGENCY (EASA) AND EUROPEAN CENTRE FOR DISEASE PREVENTION AND CONTROL (ECDC) GUIDELINES

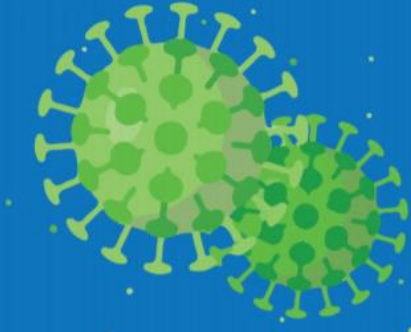
Issue date: 30/06/2020  
Issue no: 2

## COVID-19

Disease caused by the SARS-CoV-2 virus

### COVID-19 Aviation Health Safety Protocol

Operational Guidelines for the management of air passengers and aviation personnel in relation to the COVID-19 pandemic




COVID-19 Aviation Health Safety Protocol  
Operational guidelines for the management of air passengers and aviation personnel in relation to the COVID-19 pandemic  
Issue No: 02 — Issue date: 30/06/2020



## 5 Summary

### Matrix of measures per aviation stakeholder

Type of measure	Airport operators	Aircraft operators	Airport staff	Service providers/suppliers	Aircrew members	Passengers
Physical distancing	Wherever possible	Wherever possible	Wherever possible	Wherever possible	Wherever possible	Wherever possible
Hand hygiene, respiratory etiquette	Yes	Yes	Yes	Yes	Yes	Yes
Face masks	Yes	Yes	Yes	Yes	Yes <sup>35</sup>	Yes
Health safety promotion material	Yes, in coordination (see Annex 3)		Yes, should adhere to the recommendations and disseminate the material/information where required under their tasks	Yes, should adhere to the recommendations and disseminate the material/information where required under their tasks	Yes, should adhere to the recommendations and disseminate the material/information where required under their tasks	Yes, should read and adhere to the recommendations
Cleaning and disinfection	Yes, see Section 3.3	Yes <sup>36</sup>	n/a	Yes	n/a	n/a
Acknowledgement of COVID-19 policy	Yes, in electronic format Coordinate the format and assessment		n/a	n/a	n/a	Yes, should acknowledge reading and understanding before the flight
Thermal screening (skin temperature check)	Yes, where required by the national authorities	n/a	Possible, if the airport operator has not implemented a staff health monitoring programme	Possible, if the employer has not implemented a staff health monitoring programme	Possible, if the A/C operator has not implemented a crew health monitoring programme	Yes, may be thermal screened if required by the national authorities
Reduced aircrew	n/a	Yes	n/a	n/a	Yes	Yes, should adhere to the recommendation of

<sup>35</sup> Face masks should not be worn by the flight crew in the flight crew compartment after boarding and while operating due to safety reasons.

<sup>36</sup> <https://www.easa.europa.eu/document-library/general-publications/interim-guidance-aircraft-cleaning-and-disinfection>



COVID-19 Aviation Health Safety Protocol  
Operational guidelines for the management of air passengers and aviation personnel in relation to the COVID-19 pandemic  
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Type of measure	Airport operators	Aircraft operators	Airport staff	Service providers/suppliers	Aircrew members	Passengers
passenger interaction		Essential in-flight services only; Avoid lavatory queuing; Designate lavatory for aircrew use only				limiting their requests to the cabin crew members to the essential.
Special disembarking procedure	Yes, in coordination with the local public health authorities		Yes, where applicable, enforce the national public health authority instructions/measures	Yes, where applicable, enforce the national public health authority instructions/measures	Yes, enforce the national public health authority instructions/measures	Yes, follow the aircrew and ground staff instructions

A multi-layered approach consistent with the ‘Plan-Do-Check-Act’ of the SMS model



# ACI conducted regional survey on public health measures

28 responses as of July



# CART recommended health measures at airports



PPE for front-line staff



Hand sanitizer stations



Cleaning & disinfection



Physical distancing



Temperature check



Physical separator



Onsite medical professionals



Non-essential facilities closed



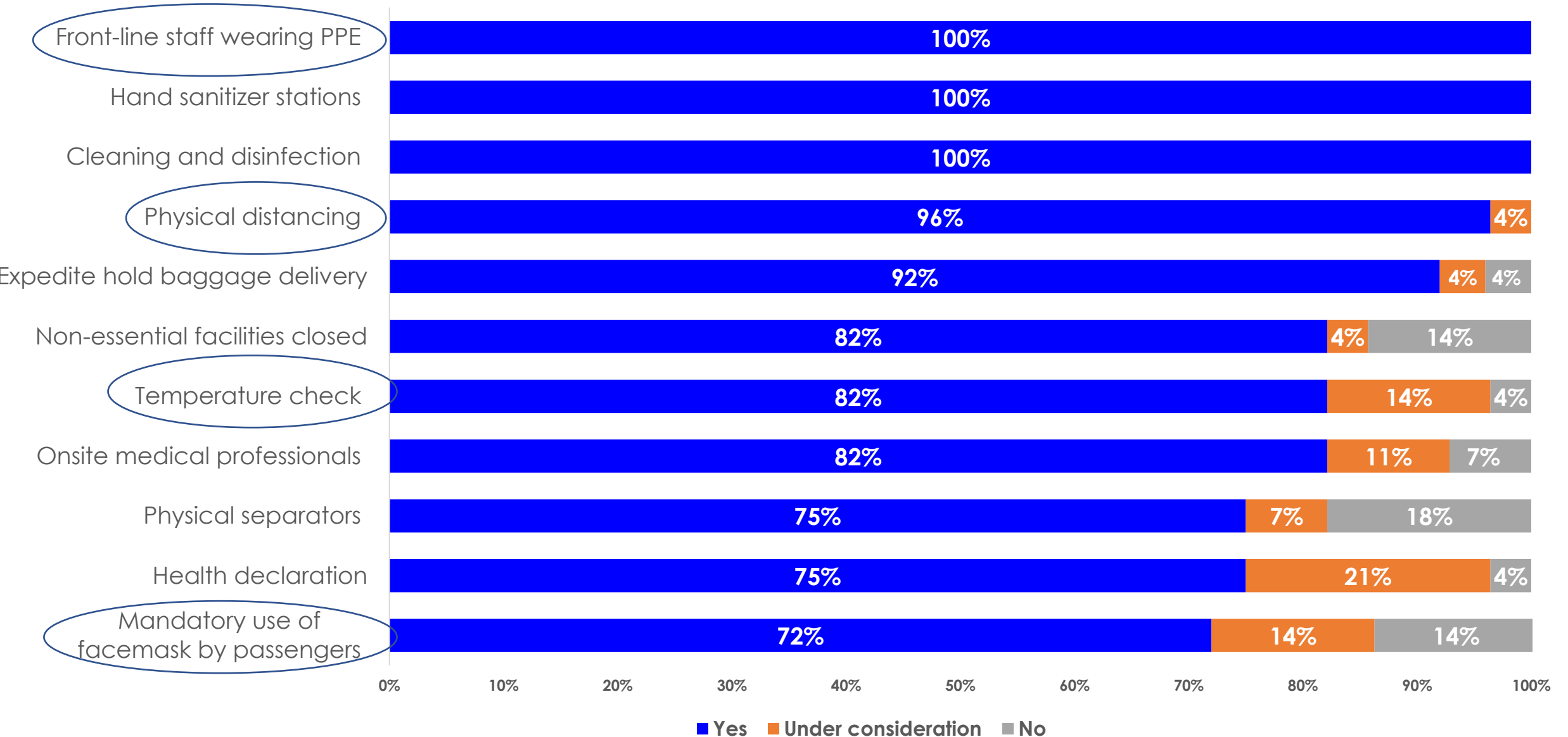
Expedite hold bags delivery



Use of face mask by pax

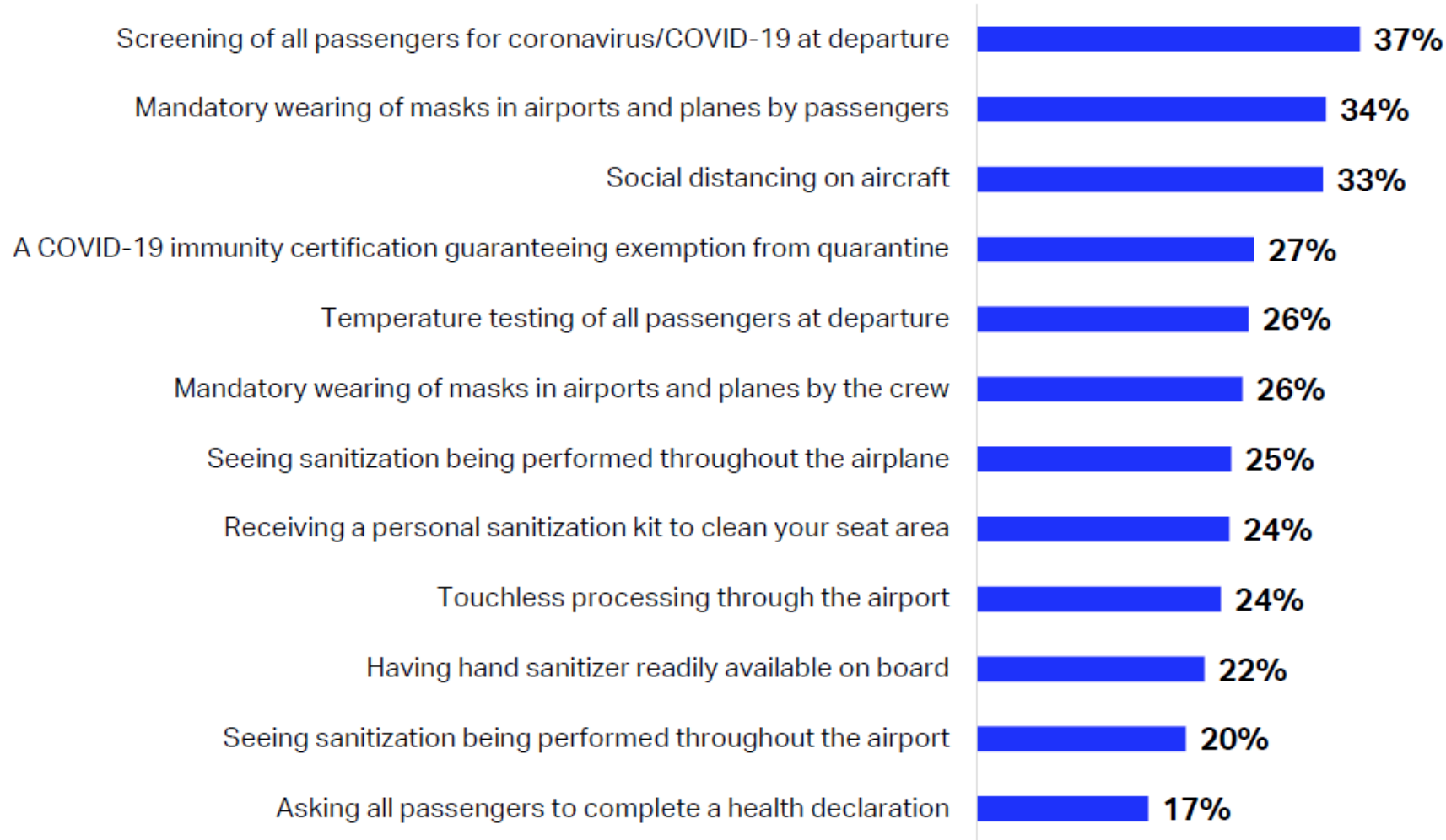


Health declaration



# Top three measures that create a feeling of safety

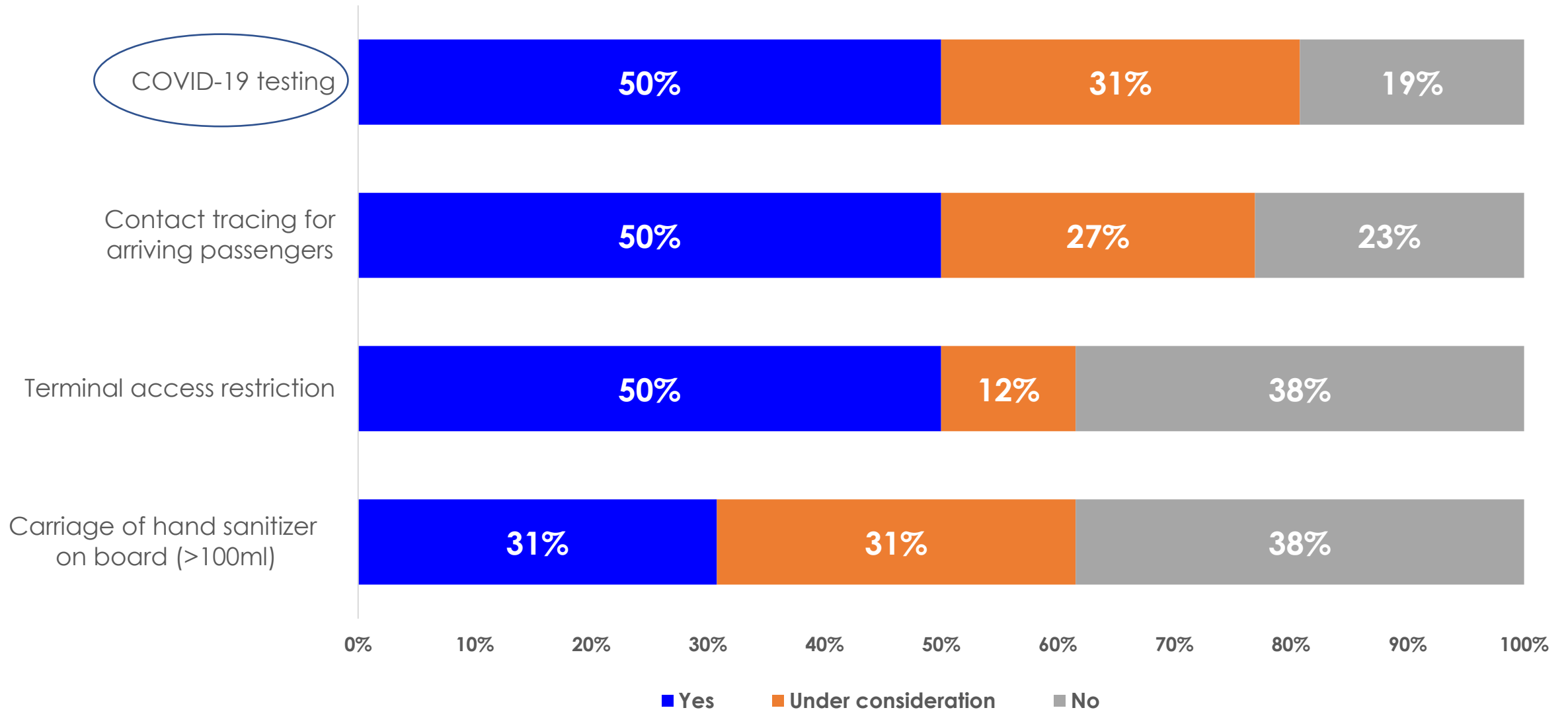
(% of people who included these measures in their top three choices)



N=4,700

Q: Of the following, which three would make you feel safest?

# Other measures: more moderate application

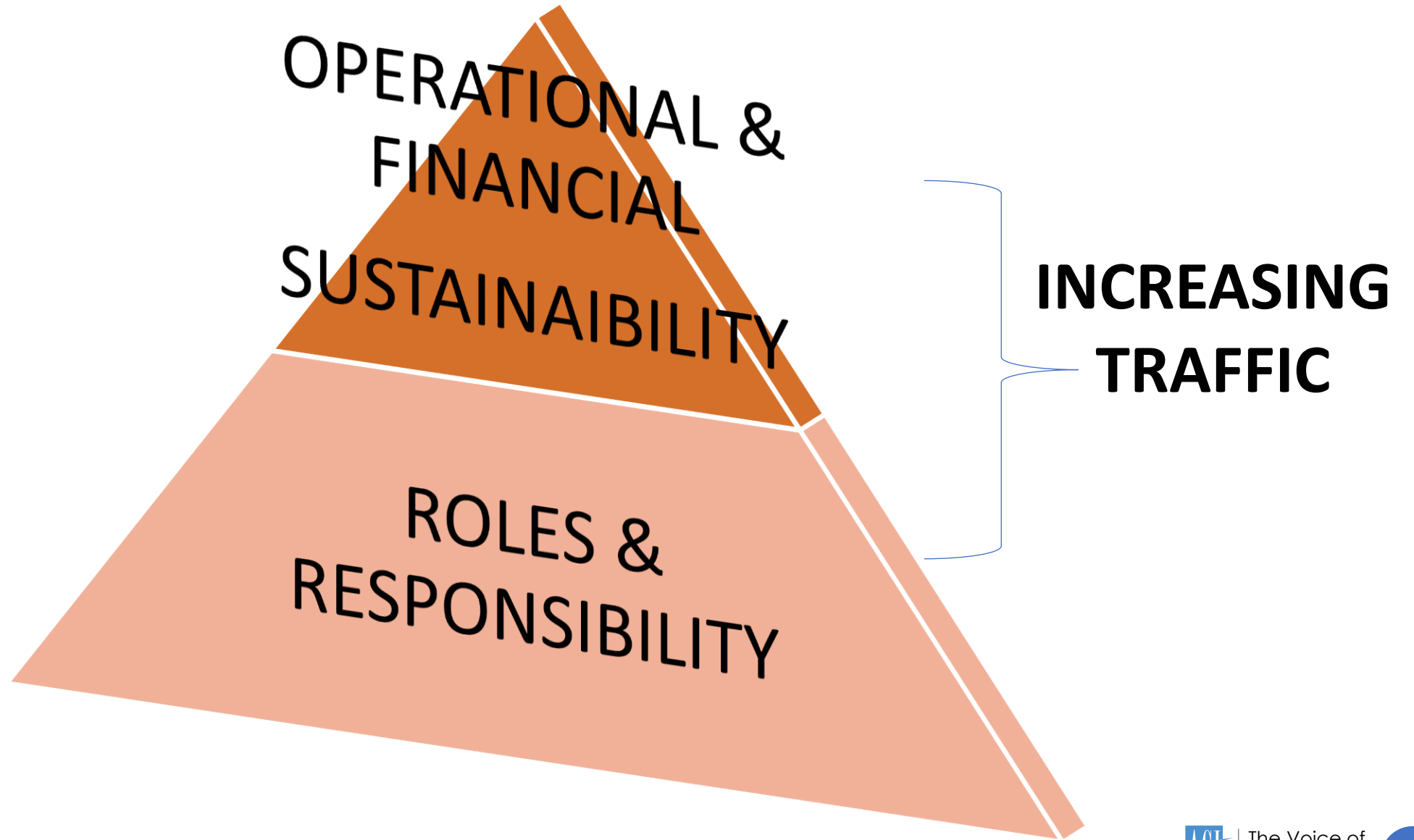


Generally less common as they are set by public authorities

# Quarantine, vs. a multilayered approach including a workable COVID-19 testing

- Passenger traffic in Asia-Pacific and in the Middle East is progressively increasing but only limited to some domestic markets. Travel bans and quarantine policy are hampering to a very large extent the recovery of international connectivity.
- Quarantine should be regularly reviewed as long as epidemiological conditions permit.
- **A multilayered approach of health measures to reduce the risk of imported cases could be considered as substitute to quarantine, based on a careful risk-assessment.**
- COVID testing should be:
  - Pre-departure - before passengers taking flight
    - to avoid congestion at destination
    - to minimize transmission risk inflight
  - If done upon arrival, should be:
    - selective based on risk (e.g. symptomatic passengers and from risky countries)
    - practicable without causing undue impact on airport ops & waiting for passengers (*off-site airport options*)

# CHALLENGES OF RECOVERY

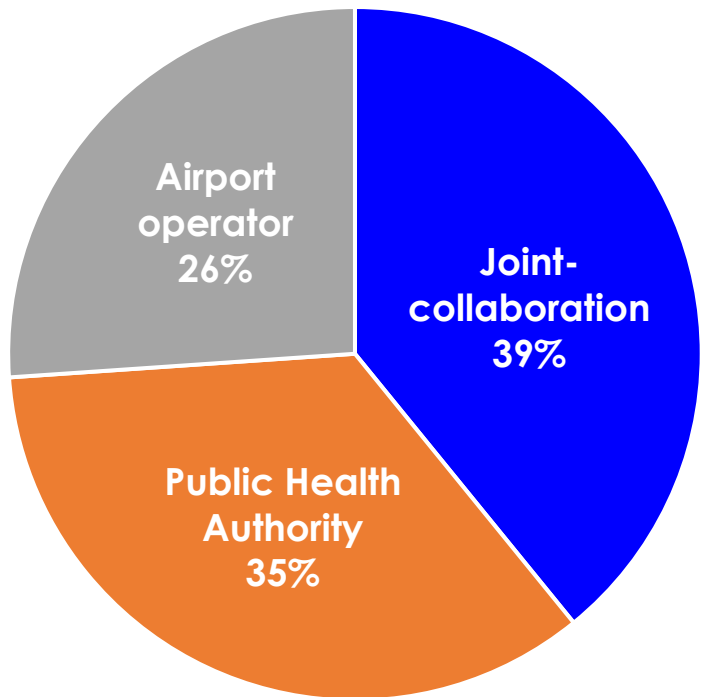


# CART implementation concerns for airports

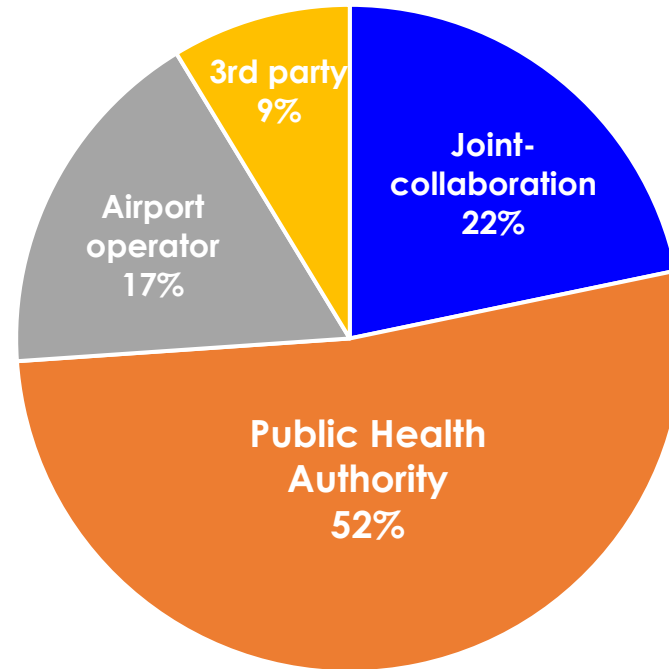
1) Roles and responsibilities for health screening measures should be defined at national level

- e.g. temperature check

## Who to buy the equipment?

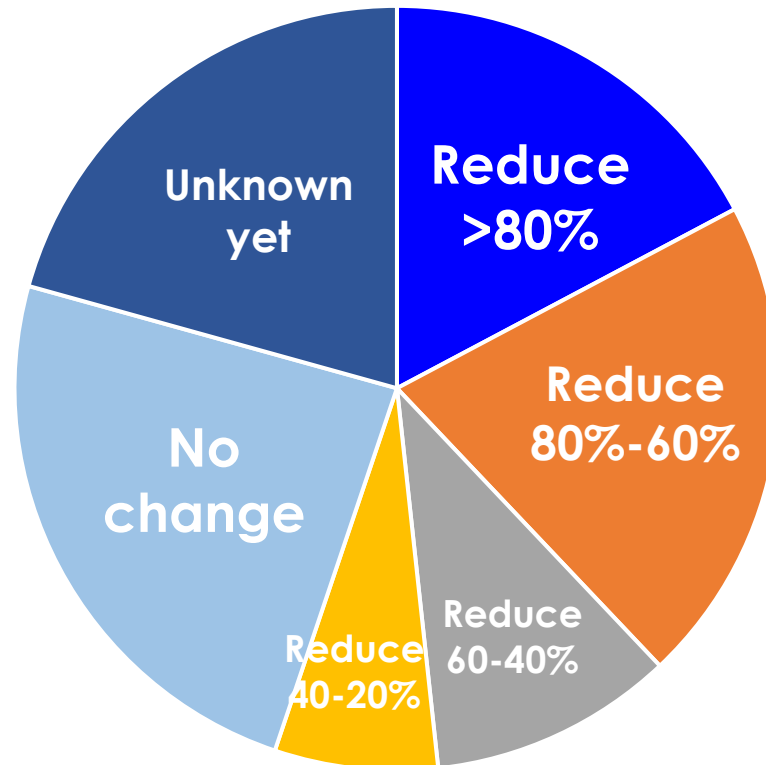


## Who to operate?



# CART implementation concerns for airports

- 2) Impacts to airport operations due to additional health measures will increase in conjunction with increasing volumes of traffic
- e.g. reduction in passenger handling capacity



# As traffic increases, a balance approach is needed



Risk of  
transmission

Operational  
feasibility

# ACI suggestions for INTERNATIONAL operational restart and recovery

- Based on risk assessment relaxation of travel restriction (including quarantine) – dynamic travel bubbles
  - ICAO, States (CAA & public health authority) and industry involved in the dialogue with other competent Authorities
- Responsibility and practicality of additional health measures
  - Definition of roles & responsibilities
  - Operational impacts (e.g. physical distancing whenever possible, workable PCR testing if accurate, quick and scalable)
- Public financing for health screening measures
  - Cost should be borne by governments to the extent possible