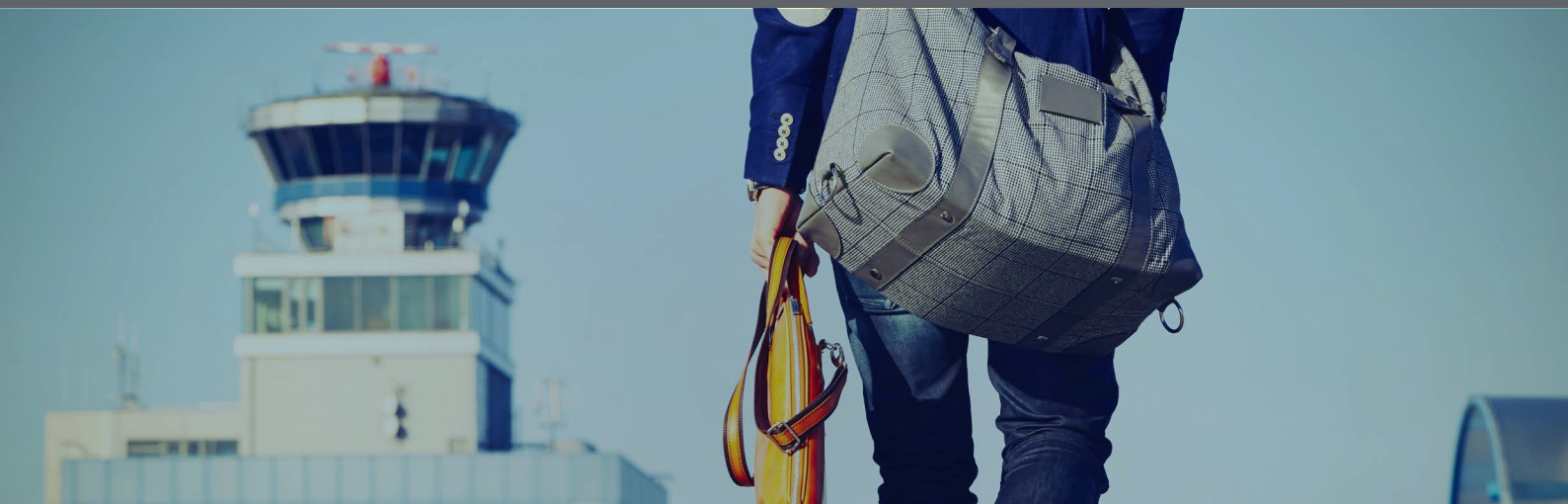


Getting back to business travel On the airplane

To give people the confidence to resume travel, measures are already being rolled out by suppliers, regulators and other organizations to ensure they can do so safely, with a much-reduced risk of exposure to COVID-19.

Many aspects of air travel may not return to how they were before COVID-19. Safety has always been the top priority for airlines. While maintaining their focus on flight safety, airlines are also doing much more to protect the personal safety of their customers. Some of the changes they're making will be temporary, simply to restart travel, or may evolve as the pandemic runs its course; others may become permanent features of flying.





What does the new future of air travel look like? This report provides some of the answers, detailing changes already introduced in some markets and some that are on the way, and even speculating on some of the more innovative approaches airlines may adopt to protect passengers from COVID-19.

Proposals from the International Air Transport Association (IATA) give an idea of some of the biosecurity measures on the way to reassure passengers and get them flying again:¹

- Mandatory wearing of face coverings by passengers, airport and airline staff
- Temperature screening of passengers and airport workers
- Boarding and deplaning processes that reduce physical contact
- Limiting movement within the cabin during flight
- More frequent and deeper cabin cleaning
- Simplified catering service to reduce crew movement and interaction with passengers
- When proven and available at scale, testing for COVID-19 or immunity passports

Business travelers broadly agree with IATA on the airline-driven changes they consider most important.

Airline measures that travelers consider most important for ensuring safe travel



Source: BCD Travel, COVID-19 Traveler Study, May 2020

¹IATA, May 5, 2020



Less choice of flights

Fewer flights and fewer destinations

Many airlines completely grounded their fleets; those that continued to fly operated significantly reduced schedules. As demand recovers, airlines will selectively rebuild their schedules, carefully striking a balance between revenue and profitability. For example, easyJet is resuming its operations initially only within the French and U.K. domestic markets, as this is where it regards demand to be sufficient to support profitable flying.² Almost half of travelers are concerned about the impact of reduced flight schedules on their trips in the future.³

For many airlines, it will be some time before schedules return to 2019 levels. This has a number of implications for air travel in the near future:

- Fewer flights between city pairs – China initially limited its airlines to operating a single return flight per week to each country in its network. While this is an extreme example, travelers must accept that airlines will no longer operate the same number of direct flights between two cities. If they miss a flight, they'll have much longer to wait until the next one. With fewer flights and longer processing times at airports, day business trips will become difficult, if not impossible.
- Fewer destinations with direct service – airlines will initially focus on the routes that make most financial sense. Marginal markets may be without direct service for some time, forcing travelers to make other arrangements, including accepting more connecting itineraries.

Longer journey times

For long-haul journeys, travelers can expect to spend even more time getting to their destination. When selling connecting itineraries, airlines will need to build in longer minimum connection times (MCTs) between flights to allow for the extra time passengers need to pass through enhanced health screening and security checks. Planning a stay in an airport hotel may reduce time spent between flights exposed to other travelers in the departure lounge.

When the U.S. government imposed restrictions on arrivals from Europe in March, returning U.S. citizens were required to land at one of 13 designated gateway airports - which had the capacity to screen passengers- before continuing their journey to their final destination. As travel resumes, connections to/ from international flights may also be limited to these gateway airports, requiring a connection for a journey that passengers might previously have made non-stop.

Fewer flights, more connections, longer connections, hotel stays between flights and reduced schedules will inevitably result in longer trips for many business travelers.

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²easyJet, May 21, 2020

³BCD Travel, COVID-19 Traveler Study, May 2020



Boarding the airplane

Pre-boarding will be slower

Pre-boarding passenger checks will take longer, as airline staff implement a list of COVID-19 measures, which could include:

- Confirmation that each passenger has appropriate personal protective equipment (PPE)
- A health acknowledgement questionnaire confirming that the passenger is healthy, has not been in contact with anyone displaying COVID-19 symptoms, does not have a temperature and has hand-sanitized prior to boarding. This is a task that could be performed by a smartphone app, including government-backed tracking and tracing apps.
- Temperature checks at the gate in the absence of or as a backup to airport screening. This is something Air Canada and Frontier Airlines have introduced in North America.⁴ Air France now requires passengers to have a body temperature below 38°C before they can travel.

Airlines will want passengers to find out what's expected of them before they arrive at the departure gate. In Vietnam, for example, all passengers must sit one meter apart, provide health declarations, have body temperatures checked, wear face masks and limit their talking and eating.⁵ As it prepared for the resumption of domestic flights, India's Ministry of Civil Aviation issued a 17-page set of instructions for airports, airlines and passengers.⁶

With passengers having to pass so many pre-flight checks, being denied boarding may become a routine risk of flying. At any point during their journey, anyone receiving a "red" status on India's *Aarogya Setu* tracking and tracing app will not be permitted to travel. Airlines may need to maintain booking flexibility for some time even for non-refundable tickets to ensure passengers aren't deterred from traveling, or risk traveling when unwell.

With passengers having to pass so many pre-flight checks, being denied boarding may become a routine risk of flying.

Boarding will be more disciplined

Passengers should also expect airlines to adopt a more disciplined approach to boarding the aircraft. Boarding by cabin or zone or when a passenger chooses is being replaced by approaches that minimize exposure and help airlines offset some of the delays built up elsewhere in the traveler's journey.

Since April, Delta Air Lines has adjusted its boarding process to minimize the need for travelers to pass one another when getting to their seats. Passengers now board by row number, starting from the rear and working forward. Delta still allows passengers needing extra time and assistance to pre-board. And premium and top tier frequent flyer members can still board anytime. At time of writing, Delta planned to keep this new boarding process in place until at least the end of May.

As more carriers, including Qantas and United Airlines, adopt similar boarding procedures, passengers must know their seat number and arrive at the gate in plenty of time if sitting at the rear of the plane. Otherwise they'll risk being denied boarding and missing their flight.

What applies to boarding a plane should apply equally to deplaning at the destination airport. Indian authorities require passengers to disembark sequentially in batches to ensure social distancing. Travelers can expect getting on and off aircraft to be a more disciplined experience.

Travelers can expect getting on and off aircraft to be a more disciplined experience.

⁴[Business Travel News](#), May 8, 2020

⁵[VN Express](#), April 29, 2020

⁶[Ministry of Civil Aviation](#), No. AV.29017/5/2020-DT, May 21, 2020



A cleaner, more hygienic experience

Choosing an airline based on cleanliness

Airlines recognize that aircraft cleanliness has become much more important and may even differentiate them from competitors. They are giving their cleaning and hygiene programs greater visibility in an effort to convince travelers flying is safe. Some airlines have followed hotel chains in branding their commitment to cleanliness and safety.

- Air Canada has launched Air Canada CleanCare+, a program of enhanced aircraft cleaning designed to provide customers with greater peace of mind by reducing the risk of exposure to COVID-19.⁷ It includes mandatory pre-flight customer temperature checks, health questionnaires, seat assignment policies to allow for more personal space in economy class until June 30 and providing all customers with care kits for hand cleaning and hygiene.
- The wellbeing improvements being rolled out by Qantas under its Fly Well program include enhanced aircraft cleaning, with a focus on high-contact areas- seats, seatbelts, overhead lockers, air vents and toilets.⁸
- United Airlines has introduced United CleanPlus to deliver “industry-leading cleanliness.”⁹ It’s taken advice from Cleveland Clinic to enhance cleaning and disinfection using Clorox products. This includes disinfecting high-touch areas like arm rests, door handles, lavatories, seatback screens and seat belts. United says electrostatic spraying and HEPA filters will ensure a generally cleaner and safer environment on board its aircraft.

When choosing a flight, passengers now want to know as much about an airline’s cleanliness standards as its onboard service and amenities. Attention to detail, and attention to high touch-points, will matter.



While keeping your carry-on luggage to a minimum, make sure it includes hygienic wipes to clean your seat, armrest, seatbelt, etc., some hand sanitizer and extra face masks in case the one you’re wearing gets damaged. To reduce contact with other passengers, even if you regularly occupy an aisle seat, it may be safer and more convenient to choose a window seat.



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⁷[Breaking Travel News](#), May 5, 2020

⁸[Future Travel Experience](#), May 2020

⁹[United Airlines](#), United CleanPlus



Keeping your distance onboard

Social distancing already adopted

As lockdown measures ease, onboard social distancing is one measure airlines are already using to convince passengers it's safe to fly.

Delta Air Lines has capped first class seating at 50% of capacity and at 60% in the economy and premium economy cabins until June 30. Middle seats are blocked, as are some window and aisle seats on aircraft with asymmetric seating configurations. Blocked seats are shown as unavailable when booking. People traveling together who still wish to seat in adjacent seats still can, but they must arrange this at the gate.¹⁰

Social distancing onboard will be a legal requirement in some countries. Russia's federal consumer rights protection authority, *Rospotrebnadzor*, recommends the country's aircraft should not carry more than half their total passenger capacity when air services resume. Passengers should not be seated in close proximity to one another, including in the seats immediately in front or behind.

IATA is not entirely convinced that inflight social distancing is viable. Leaving the middle seat free on short- and medium-haul flights reduces the maximum seat load factor to 66%, below the 70% that most airlines need to operate profitably. Airlines also face higher costs as longer turnaround times caused by new

COVID-19 cleaning and screening regulations reduce aircraft utilization. Ryanair CEO Michael O'Leary agrees with IATA, arguing that leaving seats free is economically unsustainable and does not even ensure safe distancing between passengers.¹¹ But onboard social distancing will be a feature of flying for some months: JetBlue has confirmed it will continue blocking adjacent seats at least through July 6.¹²

As long as airlines feel they must keep seats free to ensure social distancing, travelers will need to book as early as possible to ensure availability and a choice of seat. Booking last-minute may no longer be an option. And if demand returns more quickly than airlines are able to bring back capacity, passengers may face paying much higher fares.

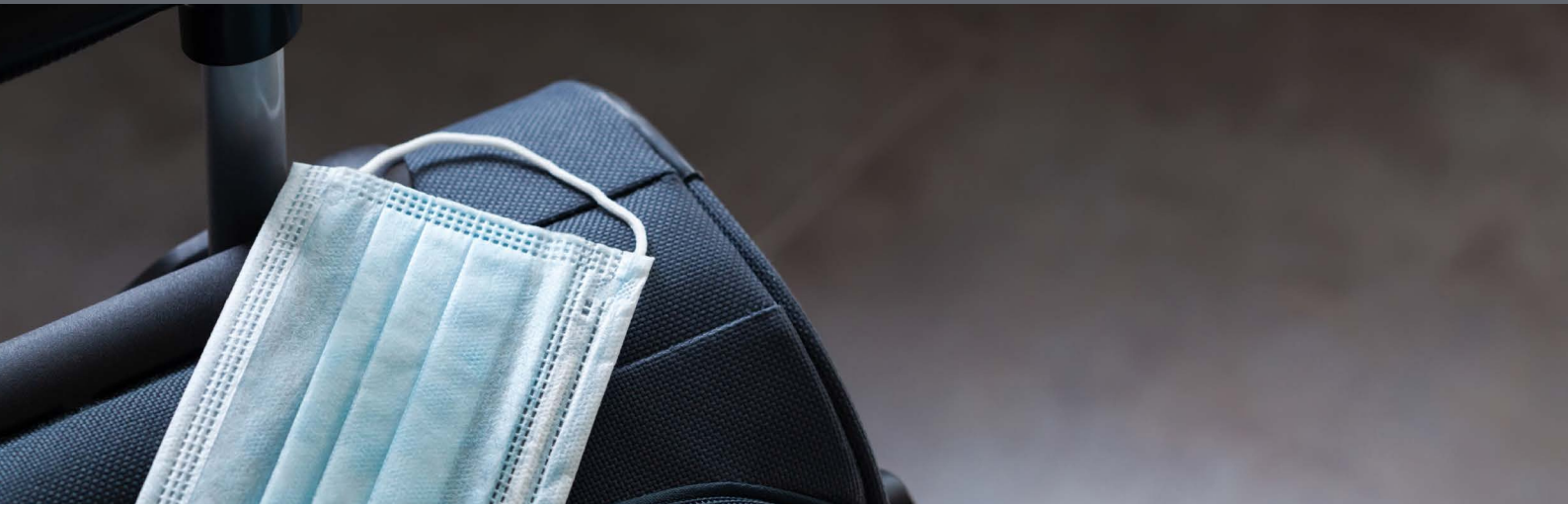
Social distancing on board is at its most effective when demand is weak. Airlines will need to adopt other strategies when demand recovers.

As long as airlines feel they must keep seats free to ensure social distancing, travelers will need to book as early as possible to ensure availability and a choice of seat.

¹⁰[Business Travel News](#), May 6, 2020

¹¹[Business Travel News Europe](#), April 23, 2020

¹²[Business Travel News](#), May 20, 2020



Staying safe inflight

Protecting against onboard transmission

Aircraft ventilation systems do a good job of controlling airborne bacteria and viruses.¹³ On average, cabin air is changed 10 to 12 times per hour. Most aircraft use HEPA filters, capable of capturing 99.97% of airborne particles.

No matter how well airlines recycle and filter the air onboard, germs can still spread within the confined space of an aircraft cabin, but only over a limited distance. According to Popular Science, passengers are at medium-risk of infection if seated in the immediate radius of someone infected with COVID-19: up to two seats in every direction. Beyond that, it describes the risks as low.¹⁴ IATA cites two examples demonstrating the low risk of inflight transmission:

- Contact tracing for a flight from China to Canada with a symptomatic COVID-19 passenger revealed no onboard transmission among the flight's 350 passengers.¹⁵
- Contact tracing for a flight between China and the U.S. with 12 symptomatic COVID-19 passengers revealed no onboard transmission.¹⁶

While suggesting the risk of onboard transmission is low, IATA has still called for passengers and crew to wear face coverings during the flight. Wearing masks lowers the risks further and reduces the need for social distancing inflight.

The Airline Passenger Experience Association (APEX) believes passengers want to be reassured that airlines are setting the highest safety standards. It advises all passengers and customer-

facing airline employees to wear face coverings, except when eating or drinking.¹⁷ A growing number of airlines are following its advice, making mask-wearing mandatory. These include all major U.S. airlines as well as Air Canada, Air France-KLM, and Lufthansa Group. As it resumes European services, KLM has made mask wearing compulsory on all flights until August 31, 2020 at the earliest.¹⁸

Air Canada has made face masks mandatory for passengers and crew.¹⁹ Passengers must show they have a suitable face-covering (mask, cloth mask or scarf) before boarding the flight. Travelers without a face-mask will be given one at security by CATSA (Canadian Air Transport Security Authority).

Wearing a mask onboard is quickly becoming the new normal for passengers, at least for the time being. It will soon be unusual to leave home without one. For passengers arriving at the departure gate without a mask, some airlines offer spares, but there's no guarantee they'll always have enough, so forgetful passengers could risk missing their flight. Not all airlines will supply masks, so a suitable face covering is something that travelers must pack for every trip. Low-cost carrier Indonesia AirAsia will only let passengers board a flight if they have two masks. Emirates advises all passengers to bring both a face mask and gloves as these are mandatory at Dubai International Airport, although the airline mandates only masks on its flights. Emirates also hands out complimentary hygiene kits at Dubai Airport, comprising masks, gloves, antibacterial wipes and hand sanitizer.

¹³[Washington Post](#), May 18, 2020

¹⁴[Popular Science](#), April 12, 2020

¹⁵[Canadian Medical Association Journal](#), April 14, 2020

¹⁶[IATA](#), May 5, 2020

¹⁷[APEX](#), April 30, 2020

¹⁸<https://news.klm.com/klm-starts-gradual-and-careful-restoration-of-its-european-network-and-makes-face-masks-compulsory-on-board/>KLM, May 4, 2020

¹⁹[FTE](#), April 2020

Even as the worst effects of the pandemic recede, masks should remain part of the travel kit—no one can be sure when or where COVID-19 may return and the speed with which travel restrictions are re-imposed. It's best not to be caught out without a mask. It will become common practice to check with the airline for its mask policy; better still, travelers will get used to carrying two masks, stored separately to prevent loss of both.

Even as the worst effects of the pandemic recede, masks should remain part of the travel kit.

Less freedom of movement

Airlines may also restrict passenger movement during a flight to reduce the risk of transmission. Ryanair is one of the first airlines to prohibit queuing in the aisle for the toilets. Passengers will only be able to use the facilities on request,²¹ and then will need to take extra care over cleanliness and sanitization.

Having to spend more time seated during a flight has wider wellbeing implications. Sitting upright and inactive for long periods of time increases the risk of blood clots and can cause backache, excessive fatigue and swollen feet.²² As passengers will no longer be able to loosen up with a walk up the aisle, inflight workouts involving ankle circles, foot pumps, neck and shoulder rolls and other manipulations should become a more common sight, and might even become an organized inflight activity. And compression socks will also become an important carry-on item.

Permanent inflight protection

Keeping seats empty is only realistic (for both the passenger and airline) while demand is low. In expectation of a recovery in passenger numbers, most airlines now insist travelers wear some form of personal protective equipment onboard. It's unclear how long passengers will be happy to do this.

Given the magnitude of COVID-19's impact on global travel and the chances of it returning or another pandemic occurring, a future where travelers can be confident that flying is both safe and convenient may demand an innovation that delivers both physical distancing and personal protection. Italian aircraft seat maker Aviointeriors offers one vision of the future of travel.²³ COVID-19, it has developed two new seat designs, which keep a safe distance between economy class passengers without compromising on cabin space.

- Made of easy-cleaning materials, the Janus has the middle seat of three facing in the opposite direction. A three-sided transparent shield prevents breath contamination, helping to maximize the isolation between passengers seated next to each other.
- The Glassafe is a simpler design, which can be retrofitted to existing seats. It comprises a transparent shield between adjacent passengers.

Passengers would still need to wear a mask when boarding and deplaning, but they could be mask-free when seated during the flight. The new seats could be available from the end of 2020.



Janus rear view image credit to Aviointeriors



Glassafe front view image credit to Aviointeriors

²⁰[Emirates](#), May 21, 2020

²¹[The Guardian](#), May 12, 2020

²²[Qantas](#), Your health inflight

²³[CNN](#), April 24, 2020



Carry-on conundrum

Limited carry-on

Emirates is among the airlines responding to COVID-19 with restrictions on what people can bring on board its flights. Cabin baggage must be checked in to the hold; however, business travelers can rest assured that personal items such as laptops, handbags and briefcases are still allowed.²⁴ Emirates also reminds travelers to bring their own pen to complete Health Declaration Forms required by some destinations. Passengers who fail to check an airline's latest baggage guidance before traveling risk having to check in their carry-on bags at the airport, wasting time and possibly incurring a last-minute checked baggage fee. This information will be even more important to check when connecting between two airlines, to confirm they are operating the same carry-on policies.



Carrying hand sanitizer has quickly become the norm for many people. Some airlines, particularly those in China, will not allow passengers to bring an alcohol-based sanitizer onboard as it contains a flammable substance. And only sanitizers with an alcohol content below 70% can

be checked in as hold baggage. Passengers can instead carry on hand wipes or (less effective) alcohol-free sanitizer.

Less onboard information

In-flight magazines are probably now a thing of the past, given their potential to spread bacteria and viruses. While they could be provided in a sealed plastic bag, this raises sustainability issues. The same risks clearly apply to the onboard safety card. As they are a flight safety requirement, they'll need to be disinfected between each flight. Even then, as passengers may still be reluctant to touch them, airlines will want to ensure every passenger pays greater attention to the pre-flight safety demonstration.

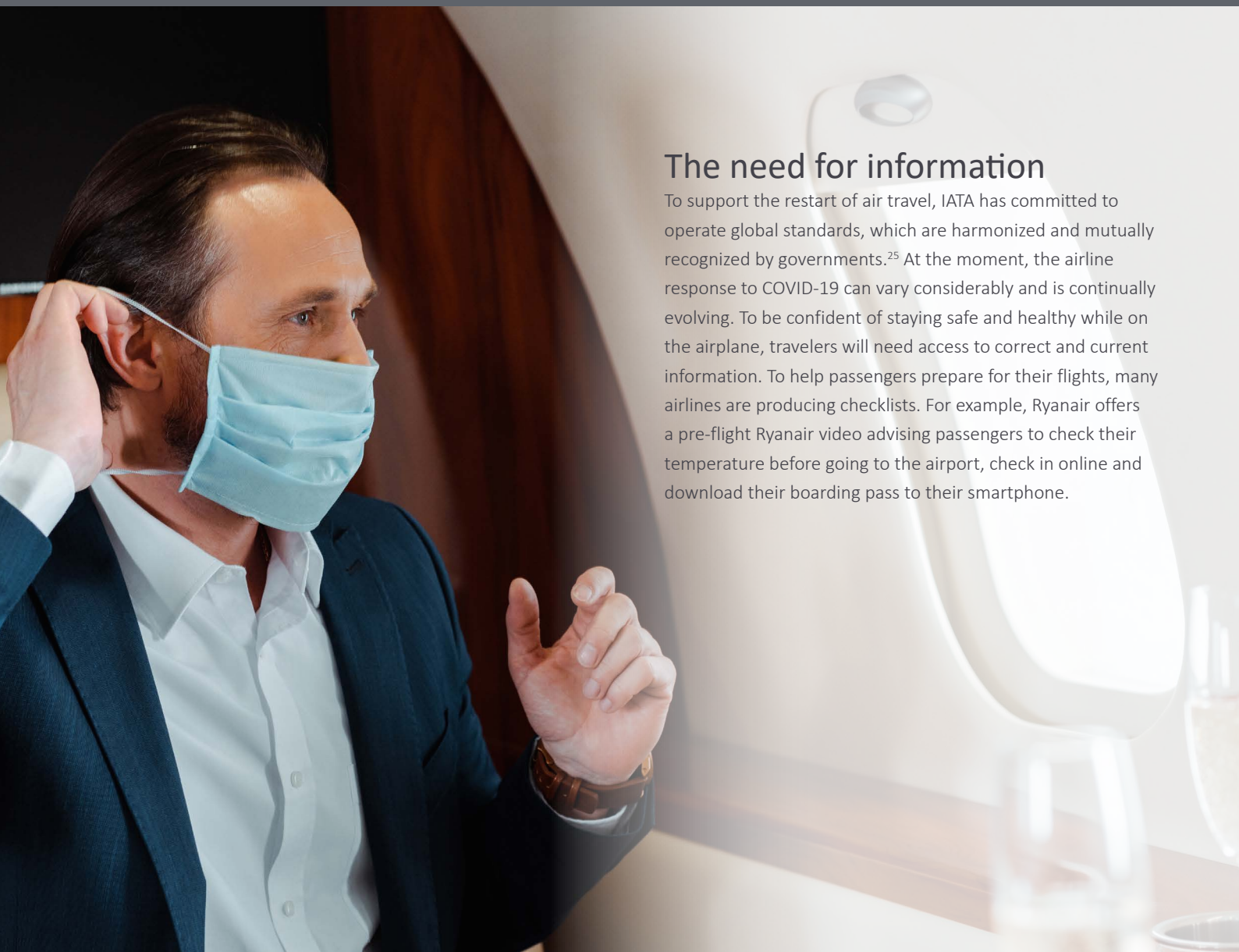
Limited in-flight service

Where airlines continue a food and beverage service, the offering may be modified to reduce contact and interaction. This could include a reduced menu, no hot food and an increased reliance on pre-packaged produce, reducing the risks of contamination. But this could limit or even eliminate food choices for travelers with specific dietary needs. Travelers should also be prepared for airlines to accept only cashless payments for their onboard purchases.

On flights where catering is suspended, travelers may face a carry-on conundrum, if an airline's revised policy prevents them from bringing their own food and drink onboard. In allowing airlines to resume domestic services in May, India's Ministry of Civil Aviation banned them from serving meals and prohibited passengers from consuming any food during the flight.

Even where such restrictions don't apply, travelers will face limits on what food and beverages they can bring through security. They may also find their airside purchase options limited, with many shops and restaurants staying closed. Some airlines may choose to have passengers collect their inflight meal as they board the aircraft.

²⁴[Emirates](#), May 21, 2020



The need for information

To support the restart of air travel, IATA has committed to operate global standards, which are harmonized and mutually recognized by governments.²⁵ At the moment, the airline response to COVID-19 can vary considerably and is continually evolving. To be confident of staying safe and healthy while on the airplane, travelers will need access to correct and current information. To help passengers prepare for their flights, many airlines are producing checklists. For example, Ryanair offers a pre-flight Ryanair video advising passengers to check their temperature before going to the airport, check in online and download their boarding pass to their smartphone.

Do you have questions or comments regarding this report? Please email [Mike Eggleton](#) to share your thoughts.



Mike Eggleton

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About BCD Travel

BCD Travel helps companies make the most of what they spend on travel. We give travelers innovative tools that keep them safe and productive, and help them to make good choices on the road. We partner with travel and procurement leaders to simplify the complexities of business travel, drive savings and satisfaction, and move whole companies toward their goals. In short, we help our clients travel smart and achieve more. We make this happen in 109 countries with almost 14,900 creative, committed and experienced people. And it's how we maintain the industry's most consistent client retention rate, with 2019 sales of US\$27.5 billion. For more information, visit www.bcdtravel.com.

²⁵IATA, May 19, 2020

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