



## Secure your airport the pole position during the recovery phase

### Abstract

*When recovering from the Covid-19 standstill, all aviation stakeholders have to adjust to new circumstances, ongoing uncertainty, perceived health risks and respective anti-Covid-19 measures. Touchpoints that are already popular for long queues, such as check-in, security checks or boarding, will be associated with the fear of infection. Therefore, passengers will aim for an increased proximity combined with increased personal distance. At first glance a contradiction, at second glance an exciting challenge. Airports, that succeed beyond the obvious initiatives of increased hygiene and sanitizing measures, will be the ones leaving a lasting impression.*

May 06, 2020

By Elena Plaumann, Michael Baltosee, Martin Neuser

### **Sleeping now does not qualify for a pole position**

The global Covid-19 outbreak has caused an unprecedented crisis in the aviation industry. Catastrophic declines in passenger numbers caused airports to lose the majority of their revenues. As soon as air traffic starts to increase, airports will find themselves in a challenging environment. From airlines fighting for bare survival, over retail partners desperately trying to fill their shops, to passengers who feel insecure and uncomfortable traveling. Any airport that is leaning back during the crisis will miss the exceptional opportunity to actively adapt to the new environment and will find themselves in the last row on day X, realizing that competitors have passed by.

### **Change is inevitable so be ahead of others**

An essential component on the way to pole position and thus to a promising sustainable situation in the future, is the offer of innovative products and services, process and infrastructure amendments as well as enabling of a monitoring system. These products and initiatives post-Covid-19 must primarily be oriented towards the changing needs of customers. The need for compatibility with new hygiene and disinfection regulations, the desire for sustainable financial stability and the restoration of confidence and well-being in air traffic, are three points that everyone, the airport and its customers have in common.

### **Close the ranks with your customer airlines**

The special relationship between airports and airlines is challenged again – two alpha-animals who now have to work more closely together than ever. Short-term measures for airports to close ranks with airlines during the recovery phase should focus on jointly controlled passenger communication and the granting of discounts on aeronautical charges. The path to truly close cooperation, including the joint use of passenger data to align according to government restrictions and new passenger needs, and the establishment of joint risk and revenue models will require a much higher degree of mutual trust and alignment.

## Be creative with your ground customers

Non-aeronautical revenues are general bringing airports the money they need to make investments. You should now be creative and work closely together with your customers in order to re-start the businesses. *Figure 1* lists distinct initiatives in terms of non-aero revenues.

Analogous to the possible alliance with airlines, discounts may also be passed to ground customers, e.g. on terminal rent to counter falling revenues per square meter.

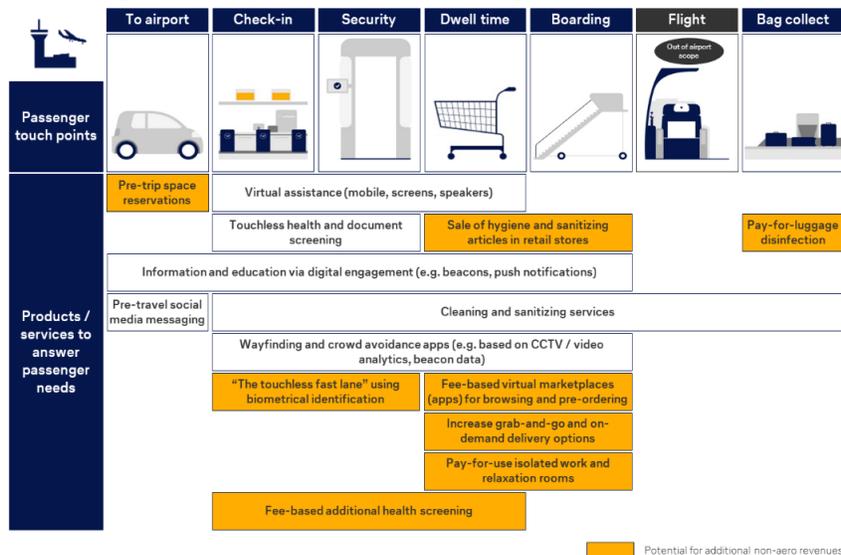


*Figure 1 Measures to retain non-aero revenues post-crisis*

Source: Lufthansa Consulting

## Discounts are one thing, additional revenues another

In addition to discounts, the airport and its non-aero partners are offered the unique and perhaps much more important opportunity to develop products and services along the customer journey. These might not only answer new passenger needs but can also result in additional revenue sources.



*Figure 2 Products and services alongside the customer journey*

Source: Lufthansa Consulting



## **Comply with health regulations while running the show**

Besides the need to offer new products and services, airports face the obligation to respect new health regulations to protect the passengers' health during the recovery phase. Especially the three passenger touch points which were critical terminal bottle necks prior to the corona situation – check-in, security and boarding, will cause headaches for many airports.

## **Creative solutions are key**

Prior to the COVID-19 outbreak, airports applied clever queuing designs to bypass the terminal bottlenecks with the goal to handle as many passengers as possible with the limited infrastructure available. The mandatory measures to protect the passengers' health, puts airports under pressure during the recovery phase. EUROCONTROL expects that air traffic increases up to 70% until the end of the year 2020 which does not leave much time for the airports to implement long-term health measures.

Taking the arrival hall and the check-in as an example, airports have to adjust their processes to ensure compliance e.g. by limiting amount of people who are allowed to enter the terminal area, introduce new queuing designs and floor markers to ensure sufficient distance and clear walkways. While these measures could be applied for the security control as well, the airports might face the challenge that adding remote security controls is necessary as the space is typically very limited.

## **Infrastructure changes are inevitable – act now**

Looking at the recommended key health requirements like social distancing for passengers and staff or continuous cleaning and sanitizing, all require additional space, but space is typically one thing that the airports' infrastructure cannot offer. New processes and operational activities have to be reflected in the terminal infrastructure.

The concept that ensures the minimum distance between the passengers should go hand in hand with an advanced passenger flow concept. The passenger flow concept should ensure that the passenger flow is designed according to the expected number of passengers, adhering to new distance requirements, walking time and possible queuing bottle necks. Increased distances between passengers in the various service areas lead to a reduction in the terminal and handling capacity. This results in an expansion of queuing and waiting areas. Which spaces or areas are available and how?

In addition, an adapted or changed route between the service areas can lead to additional processes and infrastructure measures. It has to be taken into consideration to what extent the terminal travelling times will change and if the signage system is correct and leads to the right areas.

## **Make it visual**

Passenger management, like social distancing by floor stickers and passenger information, can become mandatory for airports to ensure process flow adherence. It is more important than ever, that passengers know where to go and the way from one interaction point to the other has to be self-explanatory. The clear guidance of passengers can be supported by additional guidance staff, easy to read airport signage or mobile solutions like passenger navigation systems.



The strict compliance with Covid-19 requirements results in process adjustments, operational adjustments and infrastructural measures that have to be comprehensively evaluated, designed, planned and implemented. All service areas are affected, including those of airport users, service providers and governmental agencies. And all stakeholders require practical, fast and cost-effective solutions.

## **Collaborative Steering Team – your taskforce to ensure adherence**

All necessary planning, implementing and monitoring activities should sensibly be bundled, processed in short ways, and monitored by a nominated taskforce. The airport and relevant stakeholders should take on these complex tasks in a collaborative team. Existing resources of the individual stakeholders with local and process knowledge can be used for these tasks. This team should either extend the AOCC as the **Extended Airport Operations Committee** (E-AOCC) or a newly founded taskforce has to be nominated.

Joint coordination among the stakeholders leads to quick solutions and prevents the accumulation of passengers or employees. How can critical crowds or bottlenecks be prevented? Who intervenes where? How can ad hoc adjustments be decided?

Each airport should have the goal to offer a stress-free and health-technical safe route for the passengers while ensuring adherence to the new processes and infrastructure changes, monitored and supported by the E-AOCC.

*To learn more and discuss how your organization could benefit from Lufthansa Consulting's expertise on Crisis Recovery, please get in touch at [APcrisis-solutions@LHConsulting.com](mailto:APcrisis-solutions@LHConsulting.com). **Together, we can make it through to better days.***

---

*Elena Plaumann is an expert in the Operations and Handling Solution Group specializing on efficiency enhancement for ground operations*

*Martin Neuser is an expert in the Customer Experience Solution Group specializing on airport commercial and operational topics at Lufthansa Consulting.*

*Michael Baltosee is an expert in the Infrastructure and Logistics Solution Group specializing on airport terminal planning and airport optimization.*

*Further insights from Lufthansa Consulting's aviation experts are available at <https://www.lhconsulting.com/insights/news/>*

---