



Survey of 25 Leading Airlines Identifies Global Use of Four Strategies to Support COVID-19 Recovery

CarTrawler-sponsored research finds that guidance for travel restrictions and Covid-19 testing is now provided by most airlines.

Dublin, Ireland & Shorewood, Wisconsin, 16 March 2021: Airlines are recognizing the need to expand Covid-19 care beyond physical safety measures to new areas such as providing more online information and service features. Face masks and disinfected aircraft have become standard consumer expectations. The recovery phase of the pandemic requires an expansion of these efforts. The table on page 2 of this release displays the results of a review of 25 leading network airlines and low cost carriers grouped by global region. The following describes the key recovery-supporting features identified at airline websites during March 2021:

- **Travel Restriction Info Provided:** Airlines are posting information on the requirements travelers must fulfill before boarding an aircraft or entering a country.
- **Testing Info Provided:** Travelers now face the hurdle of getting tested shortly before departure. Airlines are taking responsibility for identifying local and mail-in testing options, and negotiating discounts.
- **Key Covid Protection Included with Trip Insurance:** Consumers are curious about buying protection against financial losses due to Covid-19 travel uncertainties. Airlines can advise consumers how the coverage sold at their websites protects (or does not protect) from Covid-19 risks.
- **Change Fees Waived for New Bookings:** Consumers hope for flexibility during these uncertain times. Most airlines helpfully continue to waive change fees to encourage confidence (and ticket sales).

“Covid-19 issues are an unfortunate yet unavoidable part of the airline customer experience at present, so it is crucial that airlines incorporate the requisite steps to facilitate smooth, hassle-free journeys for passengers during the pandemic,” said Aileen McCormack, Chief Commercial Officer with CarTrawler. “At CarTrawler, we are driving recovery in the travel sector with a unique, data-driven focus on the customer experience. Our understanding of what it is the customer wants – regardless of the environment in which they travel – will minimize short-term issues and maximize long-term revenue generation.”

Summary of Recovery-Supporting Measures Related to the Pandemic 25 Leading Global Network and Low Cost Carriers

| Carrier Based in: | Leading 25 Carriers | Covid-related features specifically found at airline websites | | | |
|-------------------|---------------------|---|-----------------------------------|---|---|
| | | Travel Restriction Info on Site | Testing Info Provided & Locations | Key Covid Protection Included with Trip Insurance | Ticket and Booking Date Limits for Change Fee Waivers * |
| Asia / Pacific | AirAsia | ■ | | Death, Med, Trip | No waivers |
| | Air China | | | ? | No waivers |
| | Cathay Pacific | ■ | Limited | Free policy, travel thru May 2021 | Tkt thru Mar 2021 |
| | Korean Air | ■ | Limited | ? | Tkt thru Mar 2021 |
| | Qantas | ■ | | Quar, Trip | Tkt thru Apr 2021 |
| | Singapore | Online tool | ■ | Med, Quar, Trip | Tkt thru Jun 2021 |
| Europe | Air France/KLM | Online tool | ■ | Evac, Med, Quar | Tkt thru Dec 2021 |
| | British Airways | | Limited, \$ | Evac, Med, Quar, Trip | Tvl thru Apr 2022 |
| | easyJet | ■ | Limited, \$ | Med, Quar, Trip | Waivers ongoing |
| | Lufthansa | Online tool | ■ | Quar, Trip | Waivers ongoing |
| | Ryanair | ■ | ■ | No coverage | Tkt thru Jun 2021 |
| | Turkish | Online tool | | No Covid exclusion | Tvl thru Dec 2021 |
| Middle East | Emirates | ■ | ■ | Free Insurance thru Mar 2021 | Tvl thru Sep 2021 |
| | Qatar Airways | Online tool | Limited | Med, Quar, Trip | Tkt thru Apr 2021 |
| Latin America | Avianca | ■ | Limited, \$ | Med | Tkt thru Mar 2021 |
| | LATAM Airlines | Online tool | Limited, \$ | Med | Waivers ongoing |
| North America | Air Canada | ■ | Limited, \$ | Free policy for FFP, int'l tkt thru Apr 2021 | Tkt thru Apr 2021 |
| | Alaska Group | ■ | Limited | ? | Ongoing ex. Basic |
| | American | Online tool | Limited | ? | Tkt thru Mar 2021 |
| | Delta | Online tool | ■ | ? | Tkt thru Mar 2021 |
| | Frontier | ■ | | ? | Tkt thru Mar 2021 |
| | JetBlue | ■ | Limited | ? | Tkt thru Mar 2021 |
| | Southwest | ■ | Limited | Insurance not sold | No change fees |
| | Spirit | ■ | Limited | ? | Tkt thru Mar 2021 |
| United | Online tool | Online tool | ? | Tkt thru Mar 2021 | |

\$ – Discount offered for airline customers. ? – Could not be determined from review of website and/or information was confusing. Death – of the insured. Evac – Evacuation and early return. Med – Medical expenses. Quar – Quarantine expenses due to illness. Trip – Cancelled trip expenses caused by a Covid infection. Insurance info may vary by place of origin. * Earlier of ticketing or travel date limits are displayed. Data is for all economy fares. Fee waivers may apply for those infected with Covid-19. Data source: English language version of airline websites reviewed March 2021.

A related 25-airline IdeaWorksCompany survey from July 2020 displayed a much cleaner table of checkmarks to display airline policies for sanitizing aircraft, requiring face masks, providing sanitizing wipes, and checking temperatures. The frequent appearance of question marks, abbreviations, and effective dates in the current table conveys the complexity of the situation facing the travel industry today.

The once simple act of booking an airline ticket has become a bumpy process which could easily dissuade consumers from booking a trip to another country or for dates beyond the near future. Savvy airlines are stepping up to the task by equipping consumers with more information and support. The following are notable features identified in research for the survey of 25 airlines:

- 92% of airlines in the survey provide travel restriction information. The best among these, such as **Air France, American, and Singapore**, offer online tools allowing consumers to enter trip details to determine exact requirements.
- Testing information is offered by 80% of the airlines in the survey with results ranging from a list of providers in key home markets to the ability to search for locations all over the world. **United Airlines** provides an exceptional global online resource, powered by TrustAssured, and includes the ability to screen location results by test delivery time. **Avianca, British Airways, Air Canada, easyJet,** and **LATAM Airlines** have arranged discounts for customers.
- Covid-19 trip insurance is offered by **Cathay Pacific** as a no-charge inclusion for passengers through May 2021. Consumers thinking of buying trip insurance to address pandemic travel worries will find confusing and conflicting terms and unwieldy policy documents. For example, Covid-19 coverage might be referenced but a close look at policy language reveals protection is not provided in the event of border closures. There is an almost universal need for concise coverage descriptions and the provision of policies tailored for travel during the pandemic.
- Consumers can be encouraged to book travel when financial risk is mitigated by change fee waivers. This has been a reliable feature during the pandemic, but airlines are curtailing this benefit. A few airlines, such as **easyJet, LATAM Airlines, Lufthansa,** and **Southwest**, are taking a long term view and have not announced expiry dates. **Alaska, American, Delta, JetBlue,** and **United** in the US have discontinued change fees. However, these fees are set to resume in April for their basic economy fares, which likely represent 40% of booking activity.

People love to travel, but the decision to travel by air is now influenced by factors beyond ticket prices and flight schedules. The airline industry must now serve two objectives: Build consumer confidence and remove trouble from travel. Consumers are anxious to return to the air, but gaining their patronage requires new levels of effort. This is the way to support the recovery – provide information that’s tailored to itineraries and easy to understand, and offer solutions that honor a customer’s natural reluctance to assume risk.

Disclaimer: IdeaWorksCompany makes every effort to ensure the quality of the information in this survey. Before relying on the information, readers should obtain any appropriate professional advice relevant to their particular circumstances. Neither IdeaWorksCompany nor CarTrawler guarantee, or assume any legal liability or responsibility for, the accuracy, currency or completeness of the information.

About CarTrawler: CarTrawler is the leading B2B provider of car rental and mobility solutions to the global travel industry. We bring opportunities to life through an online marketplace connecting our partners, customers and mobility suppliers. CarTrawler's end-to-end technology platform expands our airline and travel partners' offering to their customers, creating substantial ancillary revenue opportunities. We provide unrivalled breadth and depth of content worldwide, including car rental, private airport transfer and ride-hailing services. CarTrawler creates innovative, data-led solutions for some of the largest travel brands in the world, including American Express, Alaska Airlines, easyJet, eDreams ODIGEO, Hotels.com, KLM, TravelStart and Emirates. As a B2B company we focus solely on helping our airline and travel partners build their brands, not our own. CarTrawler was established in 2004. Our headquarters are in Dublin, Ireland, with an office in New York. For more information visit www.cartrawler.com.

About IdeaWorksCompany: IdeaWorksCompany boosts airline profits through innovations in ancillary revenue, a la carte pricing, and loyalty marketing. The firm was founded in 1996 and has an international client list of airlines and other travel industry firms in Asia, Europe, the Middle East, and the Americas. IdeaWorksCompany enjoys a reputation as a global resource for ancillary revenue strategy, on-site executive workshops, and research reports. Learn more at IdeaWorksCompany.com.

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