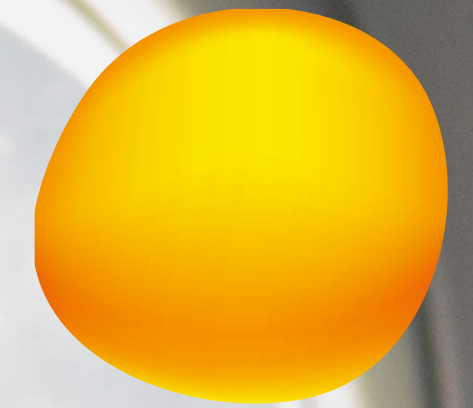
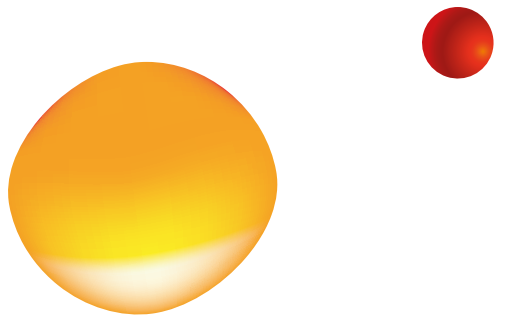


**SITA**

**2020 PASSENGER  
IT INSIGHTS**



# INTERACTIVE INSTRUCTIONS



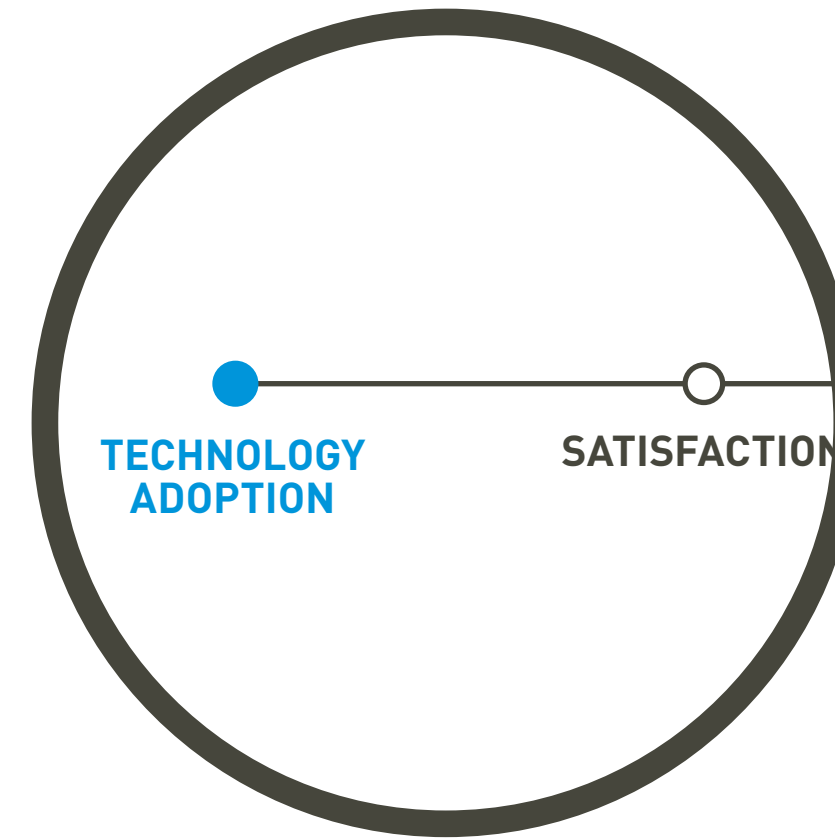
Here are a few helpful tips to help you navigate content found throughout this document.

## EASY NAVIGATION



Use the arrows to navigate through the pages chronologically, or the home button to jump back to the start.

## CONTENT GUIDE



Each page has a content guide that shows you where you are in the document.

# EXECUTIVE SUMMARY

COVID-19 presents the most significant stress test the air transport industry has ever faced. 2020 saw global passenger volume slashed as the pandemic took hold. Technology will be fundamental for airlines and airports to adapt to fast-changing regulations, safety scenarios, and help convince passengers to return to the skies.

However, passengers are also demanding faster, automated journeys, and more sustainable approaches to air travel. These are some of the key takeaways from the 2020 Passenger IT Insights, which examines the evolving use of technology in air travel and explores how technology is affecting passengers' perceptions.

**Sustainability** was front of mind for many passengers with 80% claiming they were at least 'somewhat' concerned about climate change. Most want carbon offsetting options at the booking stage, and they are highly interested in 'green airport infrastructure' and the 'use of new IT solutions' to increase efficiency at airports and for airlines.

The report also showed passengers want technology that helps them **automate** their entire journey and enables a more fluid travel experience, with the increased use of mobile phones to facilitate each step of the journey. This trend falls into line with the industry's COVID-19 response, helping to ease congestion at the airport and reducing the interaction points between staff and passengers through contactless touchpoints. Overall passengers are satisfied, however, the satisfaction rate is significantly higher when passengers use technology at various stages of their journey.

A third of passengers (34%) claim that technology to support **digital identity management** would add the most value to their journeys, superseding more widely discussed technologies like 5G and artificial intelligence.

The use of **mobile apps** has grown significantly for bookings and check in, with passenger usage rates doubling to 16% and 13% respectively in 2019. Passengers prefer using mobiles at dwell time (the period after security screening and before boarding) (57%) and onboard (62%).

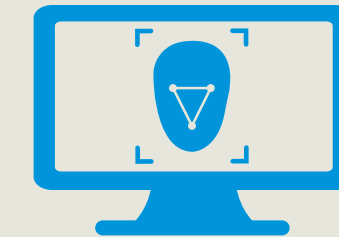
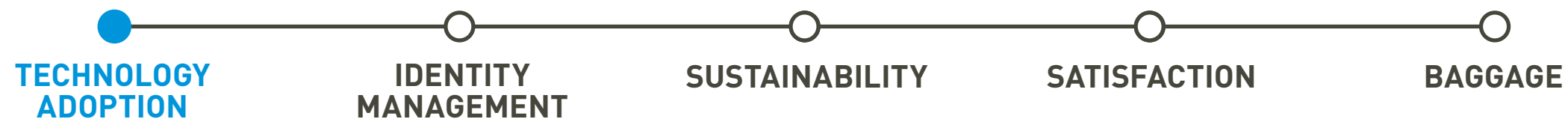
**Bag collection** is one area where mobile devices still take a back seat. Only a quarter of passengers (24%) say they received information via their mobile device, suggesting significant room for improvement amongst airports to better inform and empower passengers.

This research was conducted in January and February 2020 before the COVID-19 pandemic had its full impact on global air travel (for research methodology see page 13). The research identifies key passenger concerns and technology trends that will also impact the airline industry recovery period.

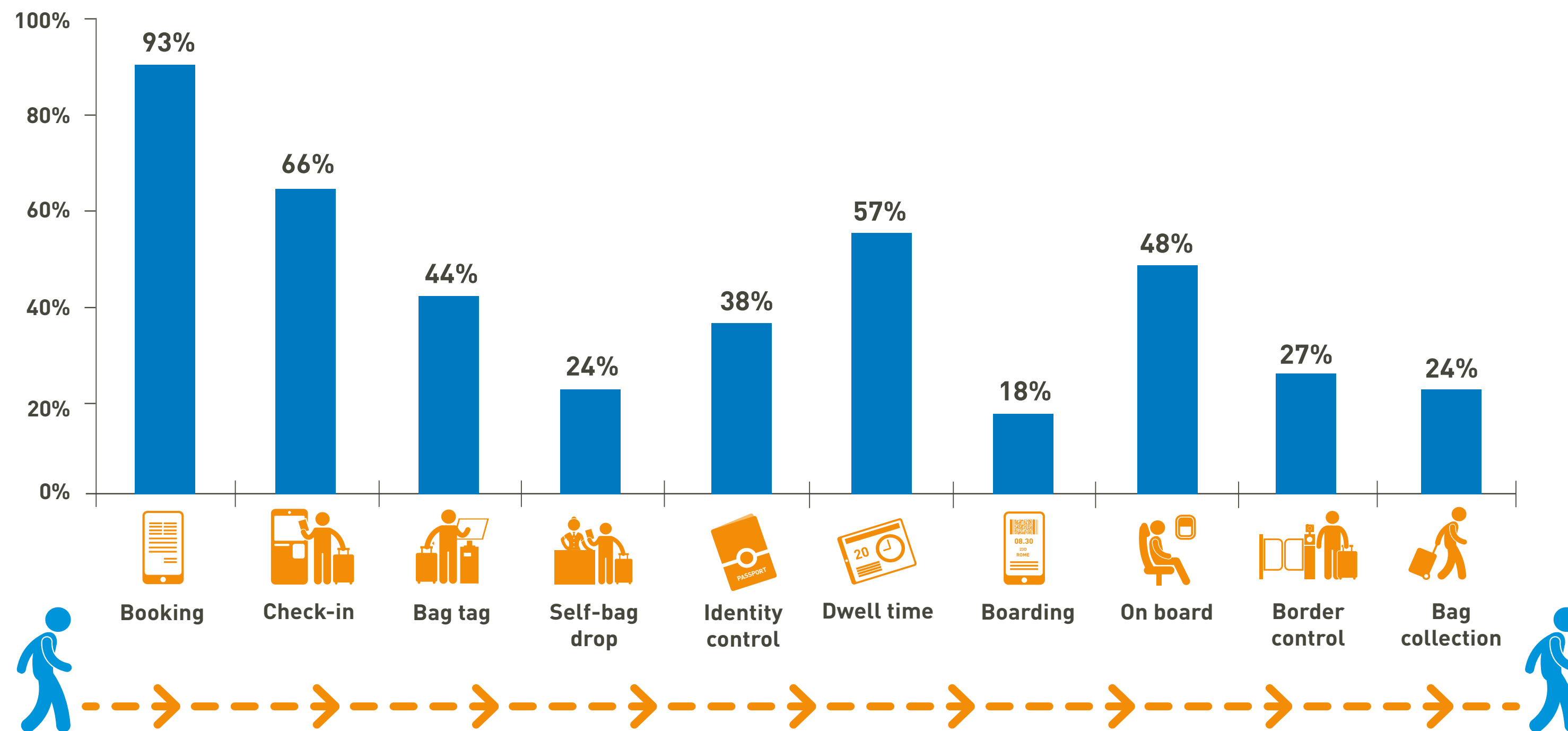


# 2020 PASSENGER IT INSIGHTS





# PASSENGER TECHNOLOGY ADOPTION



% of passengers using technology (mobile, kiosk, automated gates, web) in 2019

## ANALYSIS

### Technology adoption fluctuates widely across journey stages

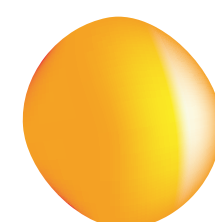
We continue to see uneven levels of technology adoption from passengers depending on the journey stage.

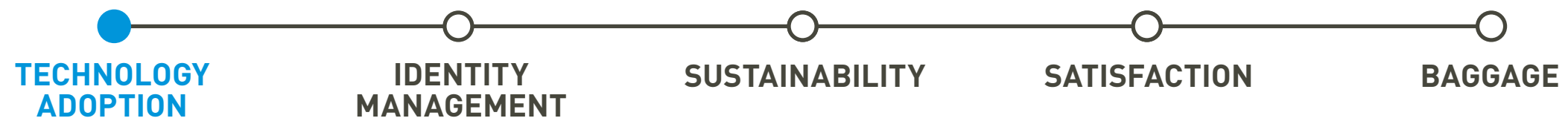
The pre-travel stages of booking and check-in continue to be growing areas of technology adoption, with booking now almost exclusively done via online channels.

After this, dwell time (57%) and on-board (48%) stages remain the most common areas of technology usage with passengers using their mobile devices.

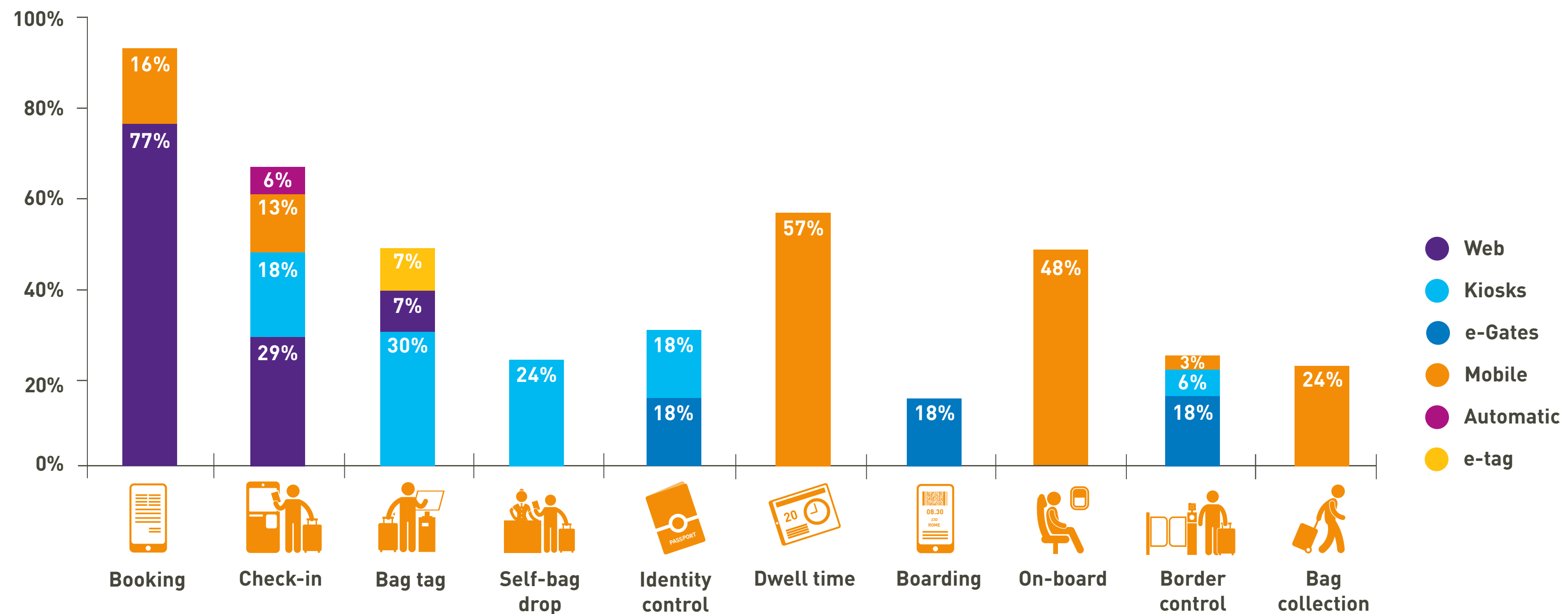
The use of automated gates for identity control and boarding remains at similar levels compared to last year reaching 38% and 18% respectively in 2019.

Technology adoption is a key enabler to delivering the touchless experiences passengers want.





# PASSENGER TECHNOLOGY USAGE PREFERENCES ALONG THE JOURNEY



% of passengers using technology in 2019

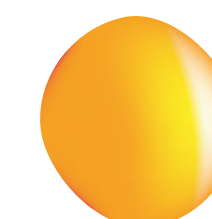
## ANALYSIS

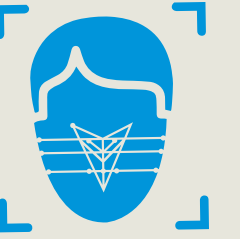
### Mobile is becoming the norm across airport touchpoints

As in 2019, we see significant preference for technologies where passengers retain a level of control. Booking is still done predominantly online for 77% of passengers as well as check-in – with 29% of passengers adopting web check-in.

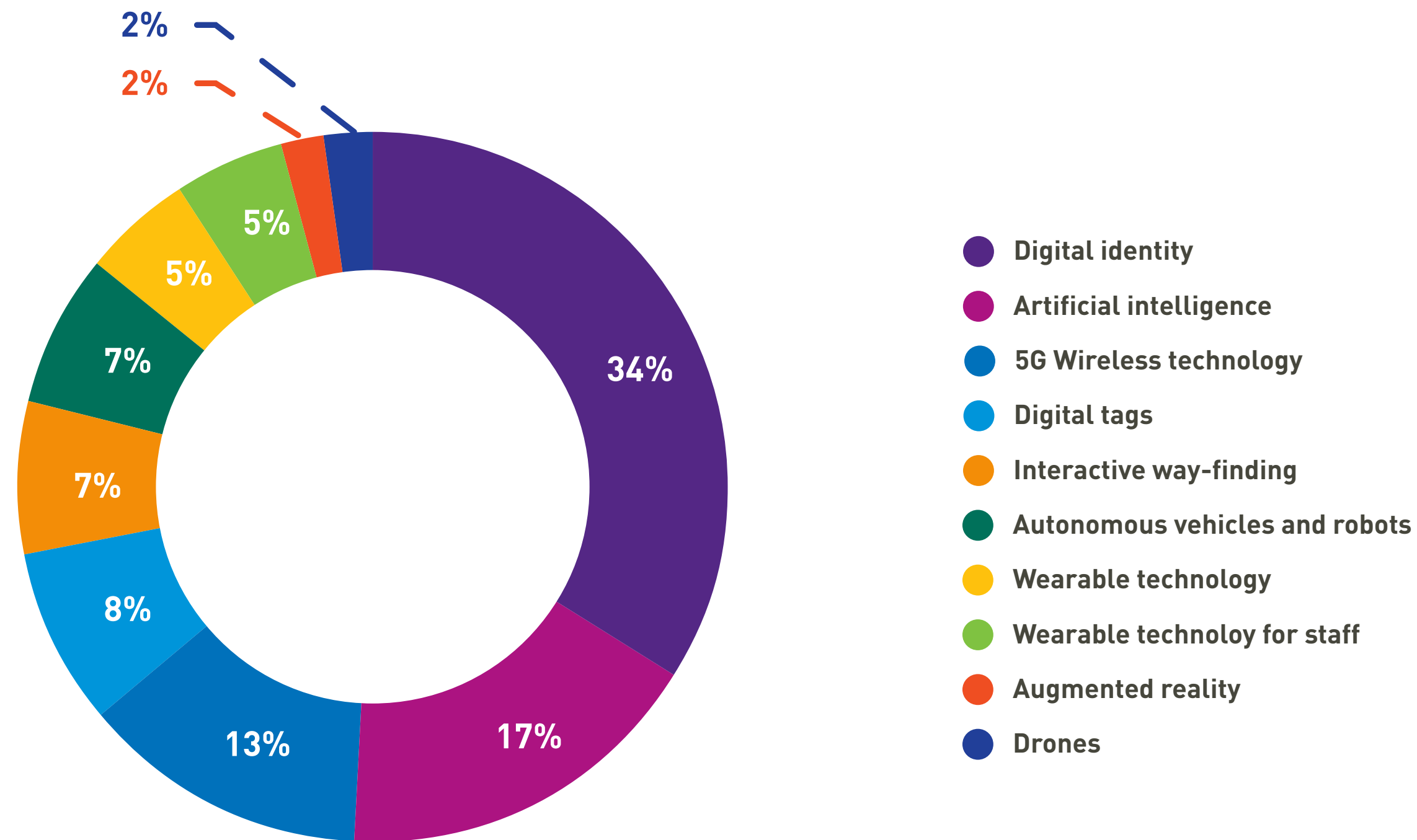
The use of mobile apps has been an area of rapid growth for booking and check-in with the adoption rate doubling to reach respectively 16% and 13% in 2019. Passengers prefer using mobiles at dwell time (57%) and on-board (48%). Only a quarter use mobiles for bag collection. Kiosks and e-gates show similar passenger usage to 2019.

The current technology adoption rate provides good reference point for the industry to provide a low touch passenger travel experience.





# TECHNOLOGY WITH THE MOST VALUE TO PASSENGERS IN THE FUTURE



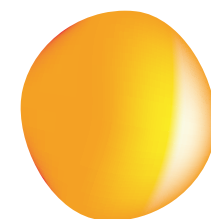
% of passengers ranking the technologies that will add the most value in the future

## ANALYSIS

### Digital identity management is considered a key future technology

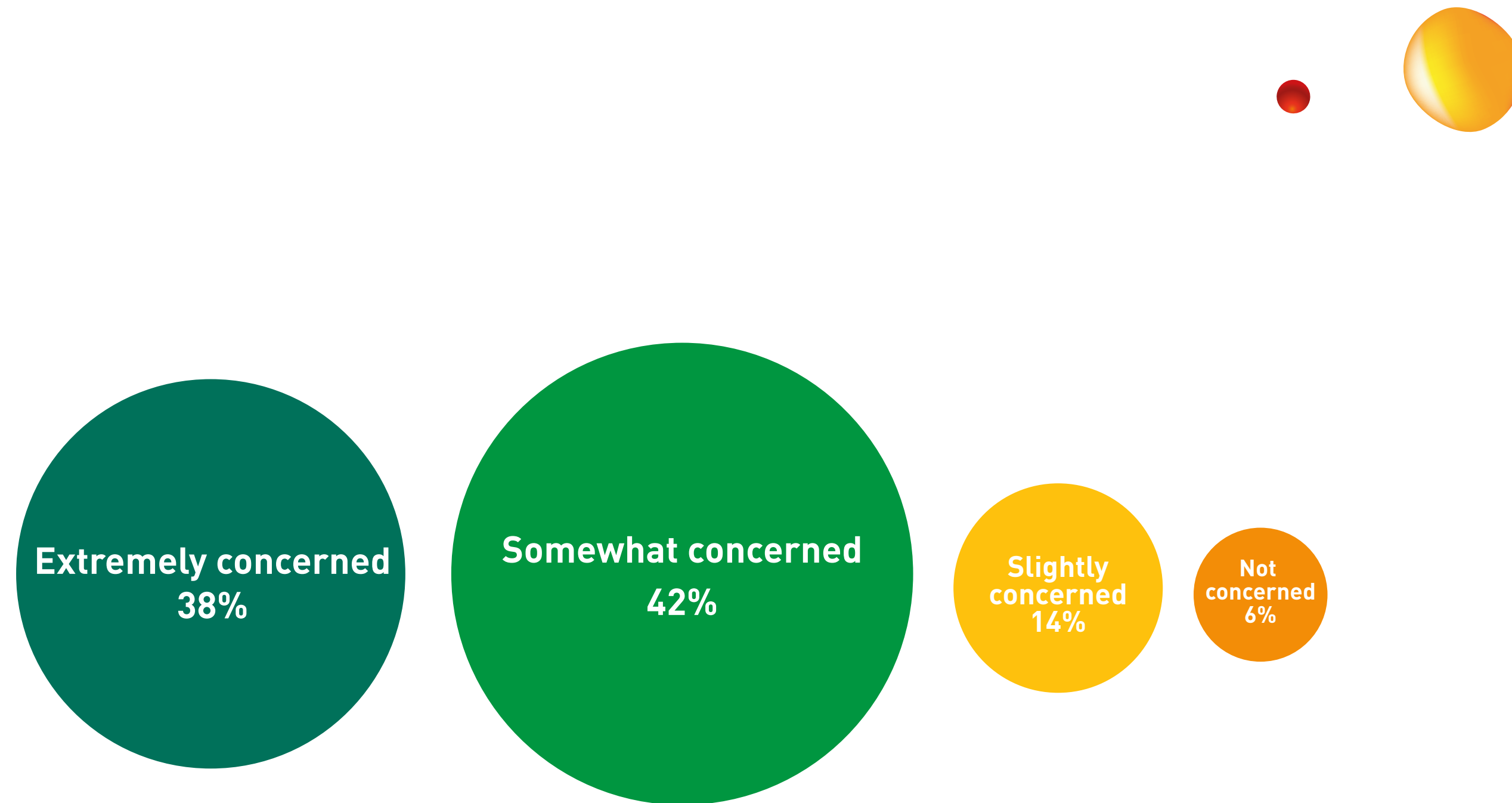
We are likely to see increases in technology use for the 'identity control' stage of the journey as digital identities become more widely developed.

Out of all areas of technology explored, this was the one that passengers thought would add most value to their journeys in the future with 1 in 3 (34%) stating this. This superseded more widely talked about technologies such as 5G and artificial intelligence.





# PASSENGER CONCERN ABOUT CLIMATE CHANGE



% of passengers being concerned about climate change in 2019

## ANALYSIS

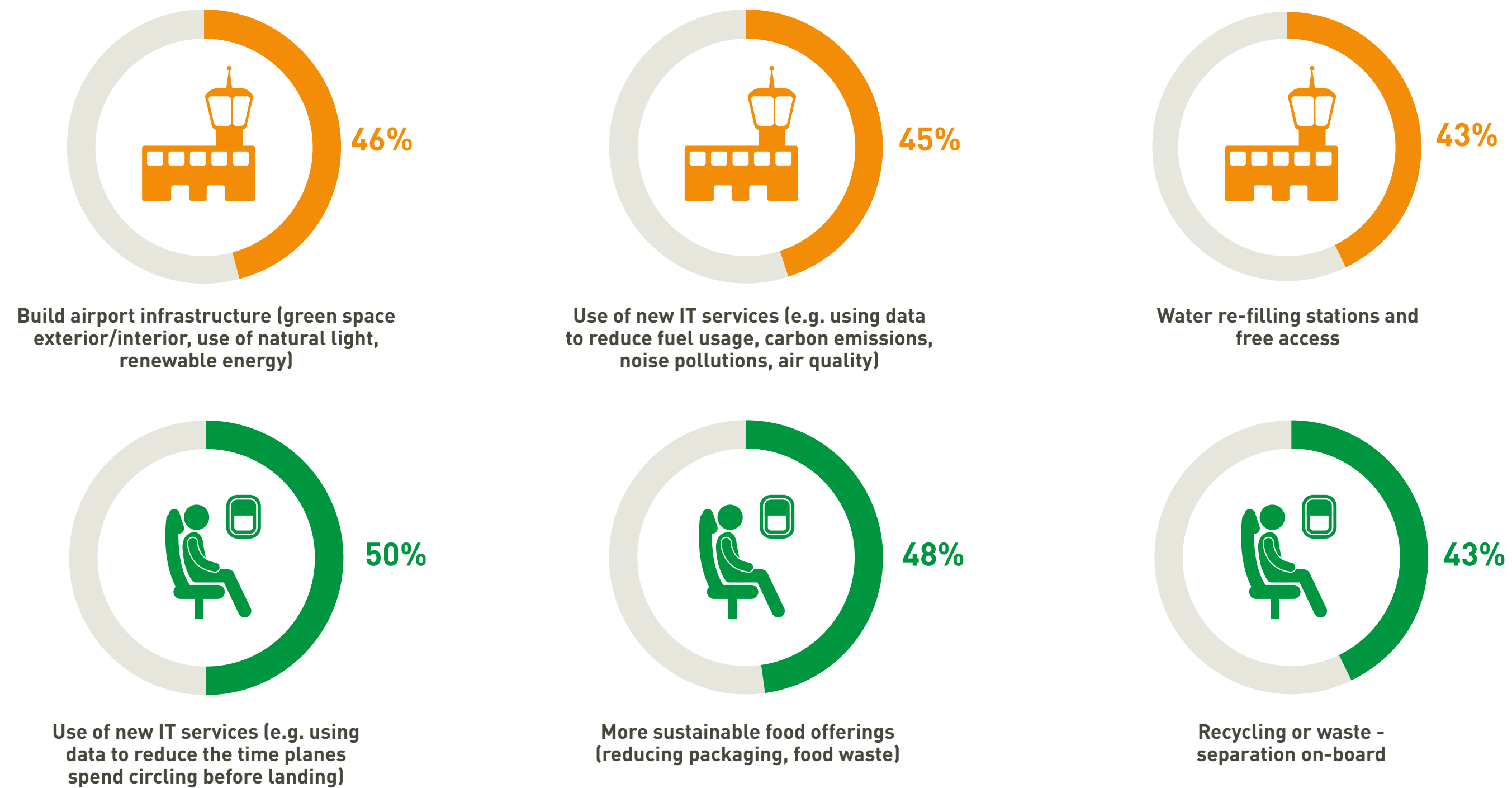
**Climate change is a pressing concern for most passengers**

**80% of passengers** said they were at least 'somewhat' concerned about climate change – with nearly four in 10 saying they are 'extremely' concerned. This is even higher amongst those who offset carbon on their latest flight, with nearly half (48%) saying they are 'extremely concerned'. This is likely to continue to increase as national and international campaigns by groups remain prominent, and the growth of trends such as 'flight shaming'.

As air travel is often seen as one of the biggest contributing factors to personal carbon footprints, making it easier for people to offset their emissions will be necessary to limit reputational damage in the industry.



## TOP 3 SUSTAINABILITY INITIATIVES VALUED THE MOST BY PASSENGERS



% of passengers that have ranked the 3 sustainability initiatives they would value the most if undertaken by the air transport

### ANALYSIS

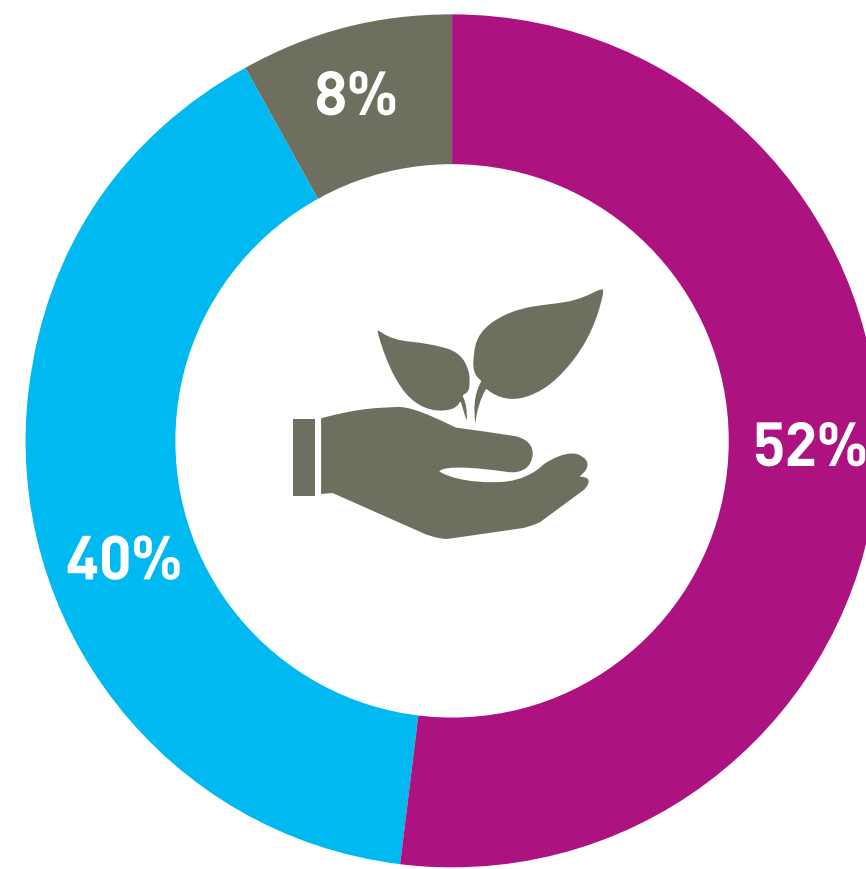
#### Passengers preference for sustainability measures

Passengers are interested in the more structural workings of airports with initiatives towards 'green airport infrastructure'.

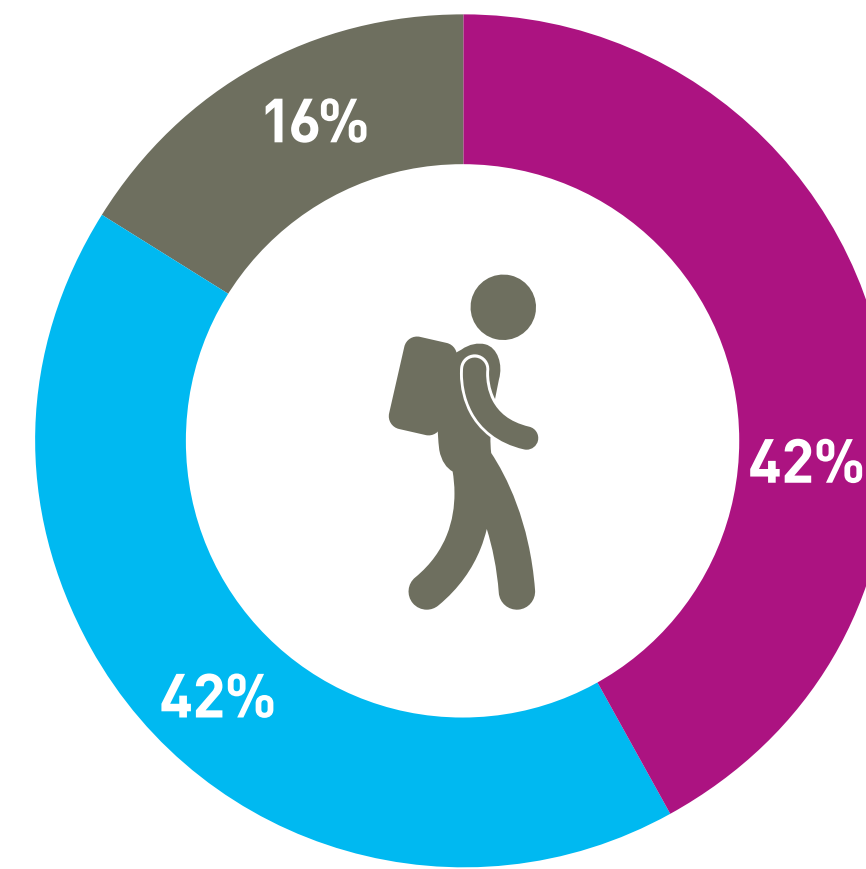
In particular, the majority of passengers mentioned the highest areas of preference with the 'use of new IT solutions' at airport and for airlines – both are not necessarily directly customer-facing.



# PASSENGER PREFERENCES FOR CARBON EMISSIONS OFFSET PLAN



Passengers offsetting carbon emissions for their flight



All passengers

- Already included in ticket price
- Option to add to ticket prices
- Offset after flight

% of passengers with preferred plans to offset carbon emissions on a flight

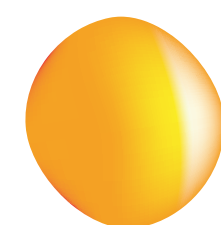
## ANALYSIS

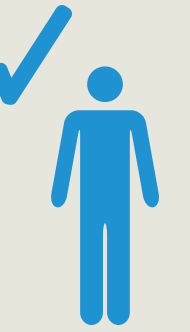
### Most passengers prefer carbon offsetting to occur at the booking stage

Overall, the majority of passengers would prefer to offset their carbon emissions prior to flying, either through having a fee already included in their ticket (42%) or with the option to add an amount to carbon offset their flight when they buy their ticket (42%). Only 16% would like to be able to buy carbon credits after their flight.

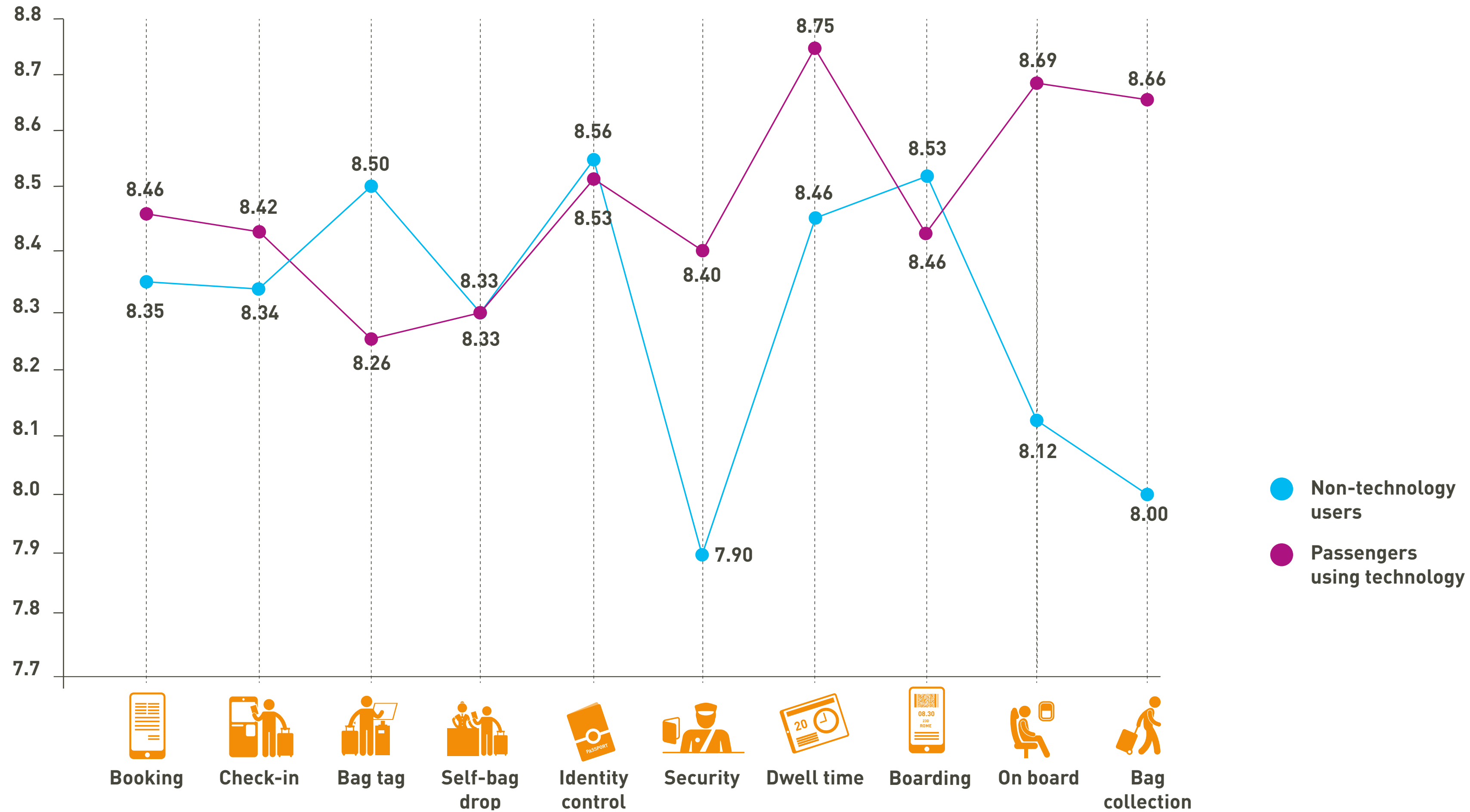
However, there are some differences based on whether passengers actually have offset their emissions or not. For those who haven't, having an option to add it to the ticket price is the preferred option whereas for those who have, they prefer to have it included in the ticket price.

When it comes to the option of offsetting after the flight, this is more than twice as popular amongst those who have not previously offset their emissions. While it is not preferred by a majority, it may be that making this option more prominent could encourage more of those who are not offsetting currently into doing so.





# 2019 PASSENGER SATISFACTION RATE



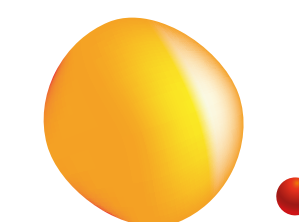
## ANALYSIS

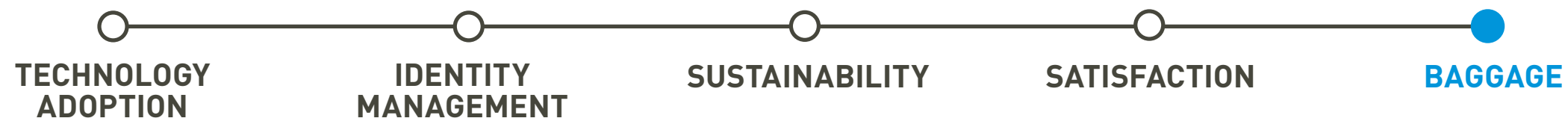
### Technology users confirmed higher satisfaction rate along the journey

There continues to be varying levels of satisfaction throughout the passenger journey with a similar trend to previous years, where those who use technology are more satisfied. Overall passengers have a high satisfaction rate reaching an average of 8.37 out of 10.

The satisfaction rate is significantly higher when passengers use technology at various stages of their journey.

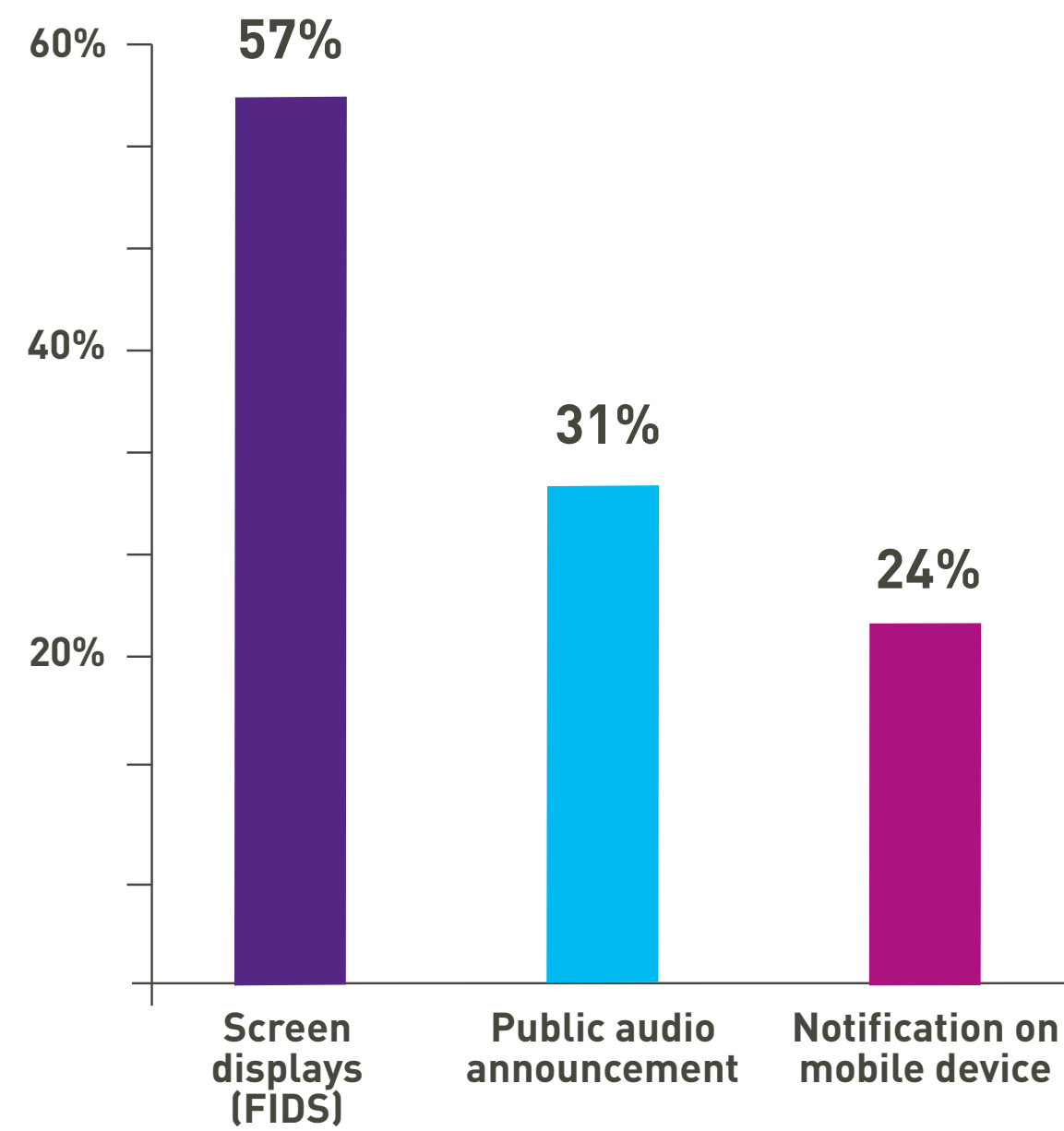
Steps where passengers may be waiting for significant periods of time - security and bag collection - are the lowest rated areas of satisfaction and the areas where passenger technology is used less.





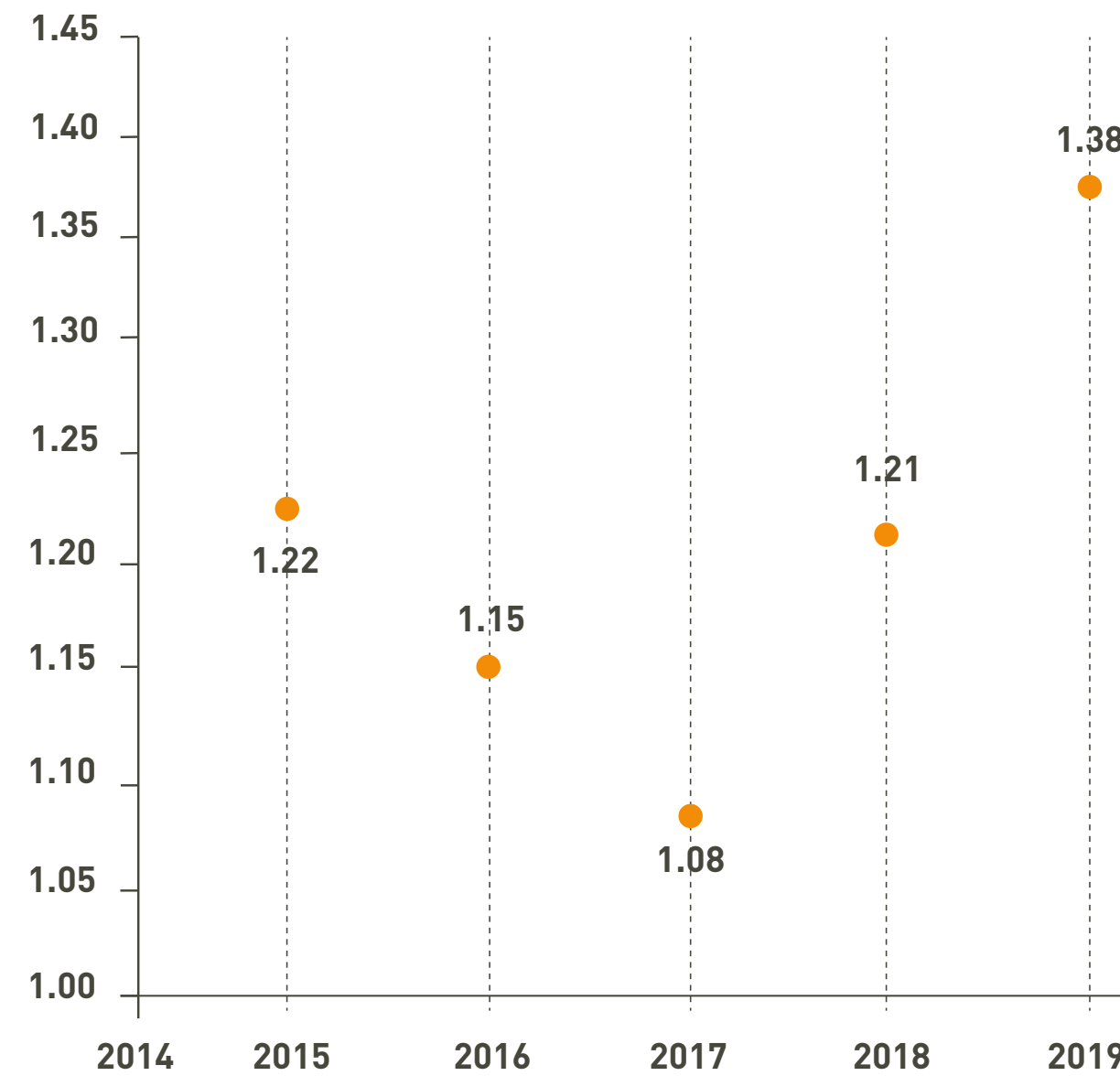
# INFORMATION AT BAG COLLECTION

## PASSENGERS AT BAG COLLECTION



% of passengers having obtained bag collection information in 2019

## AVERAGE NUMBER OF BAGS CARRIED BY PASSENGERS



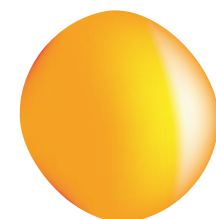
## ANALYSIS

### Information sharing at bag collection can be improved

Bag collection is the one area where mobile devices still take a back seat. Only a quarter of passengers (24%) – similar to in 2019 – say they received information via their mobile device. Screens are still the primary source of information at this stage of the journey.

In terms of the type of information received, 59% were being told belt numbers and 42% were being told time until delivery.

These figures suggest there is significant room for improvement amongst airports to share useful information with passengers. The average number of bags carried by passengers has increased, reaching an average of 1.38 bags per passenger in 2019 – representing 14% increase from previous year.





# 2020 PASSENGER IT INSIGHTS



## METHODOLOGY

Fieldwork for the 14th edition of the Passenger IT Insights was conducted globally in Q1 2020. The key findings are based on an online survey of 6813 respondents from 27 countries across the Americas, Asia, Europe, Middle East and Africa.

The number of respondents by country is relative to the amount of passenger traffic for each country, based on data from Airports Council International (ACI). Collectively, the respondents represent over 75% of global passenger traffic.

Survey's respondents were selected on the following criteria:

- Passengers must have travelled at least once in the previous three months.
- Passengers must have traveled through a large or regional airport in the country surveyed.
- Main countries: Australia, Brazil, Canada, China, Egypt, France, Germany, Ghana, India, Indonesia, Japan, Kenya, Mexico, Morocco, Nigeria, Republic of Korea, Russia, Saudi Arabia, Singapore, South Africa, Spain, Sweden, Tunisia, Turkey, UAE, UK, USA.

## SITA AT A GLANCE

### Easy air travel every step of the way.

- Through information and communications technology, we help to make the end-to-end journey easier for passengers – from pretravel, check-in and baggage processing, to boarding, border control and in-flight connectivity.
- We work with about 400 air transport industry members and 2,800 customers in over 200 countries and territories. Almost every airline and airport in the world does business with SITA.
- Our customers include airlines, airports, GDSs and governments.
- Created and owned 100% by the industry, SITA is the community's dedicated partner for IT and communications, uniquely able to respond to community needs and issues.
- We innovate and develop collaboratively with our air transport customers, industry bodies and partners. Our portfolio and strategic direction are driven by the community, through the SITA Board and Council, comprising air transport industry members the world over.
- We provide services over the world's most extensive communications network. It's the vital asset that keeps the global air transport industry connected.
- With a customer service team of over 2,000 people around the world, we invest significantly in achieving best-in-class customer service, providing 24/7 integrated local and global support for our services.
- Our annual Air Transport and Passenger IT Insights for airlines, airports and passengers are industry-renowned, as is our Baggage IT Insights.
- In 2019, we had consolidated revenues of US\$1.8 billion.

For further information, please visit [www.sita.aero](http://www.sita.aero)



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