

The impacts of Covid-19 on the air travel experience

A qualitative customer research study from Purple Shirt

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Introduction

In May we conducted a survey to explore the impact of Covid-19 on the air travel experience from a customer perspective. The survey was completed by 80 predominantly New Zealand based participants who met basic segmentation criteria relating to their frequency and reason for travel.

Specifically we wanted to understand:

- Customers expectations as to how the different phases of the air travel experience will likely be impacted.
- What it will take to create a trusted environment in which customers can travel with confidence and provide airlines and airports with a practical framework from which they can deliver supportive experiences for customers.

In the time since we completed the research we have seen domestic travel restrictions eased and increasing demand for travel to domestic locations. What we can't predict is how long it will take for people to revert to pre-Covid travel behaviour and how long service providers will need to continue to adapt their operational and customer experiences.

Participant summary

80 Participants



Reason for domestic travel

- 60% Leisure
- 8% Business
- 32% Mix of leisure and business



Reason for international travel

- 62% Leisure
- 4% Business
- 34% Mix of leisure and business

Research themes

The key themes resulting from the research were of no surprise; customers are feeling anxious about the end-to-end experience and are motivated to reduce their risk of exposure as much as possible.

Playing it safe

Customers are risk averse when considering destinations, carriers, accommodation, activities or transport. Primarily customers stated a preference for domestic travel and are looking for ways to minimise exposure when travelling.

Assurance

Before travel, customers want assurances from airports, airlines and service providers that robust protocols are in place and will be maintained for the duration of their travel.

Reassurance

During travel, customers stated they would be more diligent and responsible for their own health, however they still want to have visible reassurance that hygiene and safe distancing protocols are being maintained by others.

Processing delays

Customers expect there to be negative impacts from the introduction of health and safety protocols which will lead to processing delays at the airport. Customers intend to find ways to circumnavigate processing delays as they will have much more of a “get in, get out” mindset to navigating the airport.

Reduced staff and retail

Customers believe that for safety reasons, there will be fewer interactions with staff and reduced retail activity along their journey.

Prepared for change

Regardless of the health and safety measures put in place, customers expressed an intention to put more effort into their contingency planning should things go wrong, including more attention paid to insurance policies.

Trusted entities and networks

Customers are more focused on travelling and interacting with trusted entities whether it be individual organisations or countries. Preference will likely be given to networks where it appears trusted entities are working together (e.g. country to country, airline and airports). Increased emphasis on trust at an entity and network level suggests loyalty programmes could become more relevant.

Private by nature

Customers indicated their transport and accommodation choices would tend to be less public and instead rely on private options.

Social expectations

Customers expect travelling to be less convivial as people keep their distance but at the same time there is an expectation that people will become more aware and sensitive to those around them. Where congregation is unavoidable (e.g. queues for toilets), customers want the relevant authority to have robust practices in place to reduce risk.

Premium advantage

Premium will not only be about more comfort and privilege, but will be closely associated with less risk.

Anxiety

Customers acknowledge they would have increased levels of anxiety when travelling, particularly driven by a need to constantly monitor the health of the people and environment around them.

Silver linings

For all the expected disruption from more robust health and safety protocols, customers believed the inflight experience would likely improve from cleaner aircraft and fewer passengers.

Impact by stage of journey

The survey was conducted within the context of a phased customer journey model that is largely representative of the key activities that customers engage in during the end-to-end flight experience.



1. Plan & book

From the initial thoughts and dreams of potential travel to the point at which you make a decision to take a specific trip then start organising details such as booking flights, accommodation and activities.



2. Trip preparation

From getting ready for the booked trip through to arriving at the airport.



3. Airport experience

From arriving at the airport, checking-in, immigration, duty free, lounge and boarding.



4. Inflight experience

From stepping onto the aircraft to landing at your final destination.



5. Arrivals experience

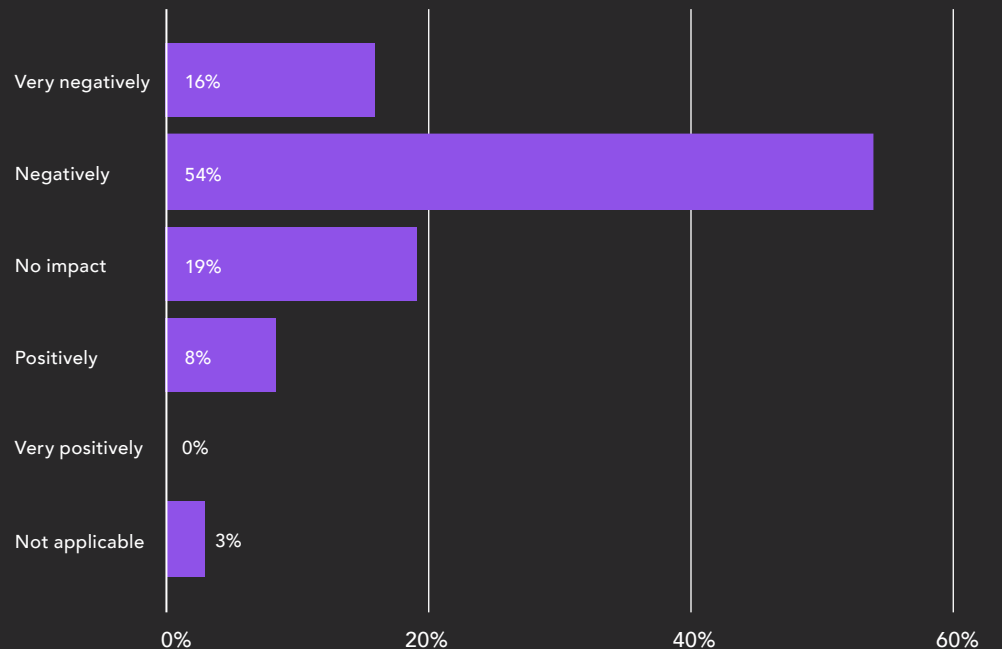
Activities that occur once you disembark the aircraft, navigate immigration and exit the airport.



Plan & book

- For the most part, customers are disregarding international travel for the foreseeable future as they consider it to be too much of a risk based on other countries' outbreak levels and there being no vaccine currently available.
- Customers were more focused on the flexibility of a booking and the cancellation policy to give them comfort that if circumstances change they will be able to get home.
- While booking, customers are increasingly thinking ahead about the hygiene risks associated when navigating the airport and cabin experience. During the planning and booking phase, airlines, airports and other service providers need to make visible how they are meeting higher hygiene standards and physical distancing measures.

How do you think Covid-19 will impact the plan & book experience over the next 12 months?

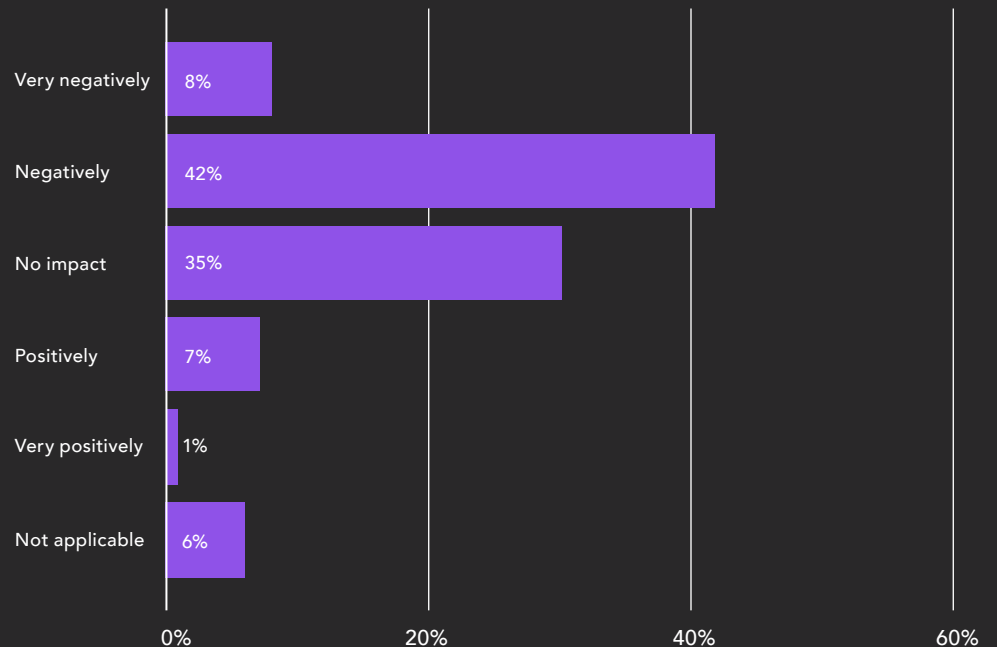




Trip preparation

- Customers will be more driven to seek pandemic related coverage with health and travel insurance providers. Those with pre-existing health conditions expect the cost of insurance to increase.
- Customers would prefer to use private vehicles or transport options with less passengers in order to reduce contact with others and ensure they have contact tracing history.
- Customers will take more responsibility for their own health and safety and will pack items which will enable them to maintain a higher level of hygiene. Equally, they will take fewer possessions onboard to reduce their belongings coming into contact with others.
- Customers will be making changes to their usual travel behaviour by arriving at the airport earlier in order to avoid congestion, and to ensure they have enough time to go through what they expect to be a time-consuming airport experience with new health screening procedures put in place.

How do you think Covid-19 will impact your trip preparation over the next 12 months?

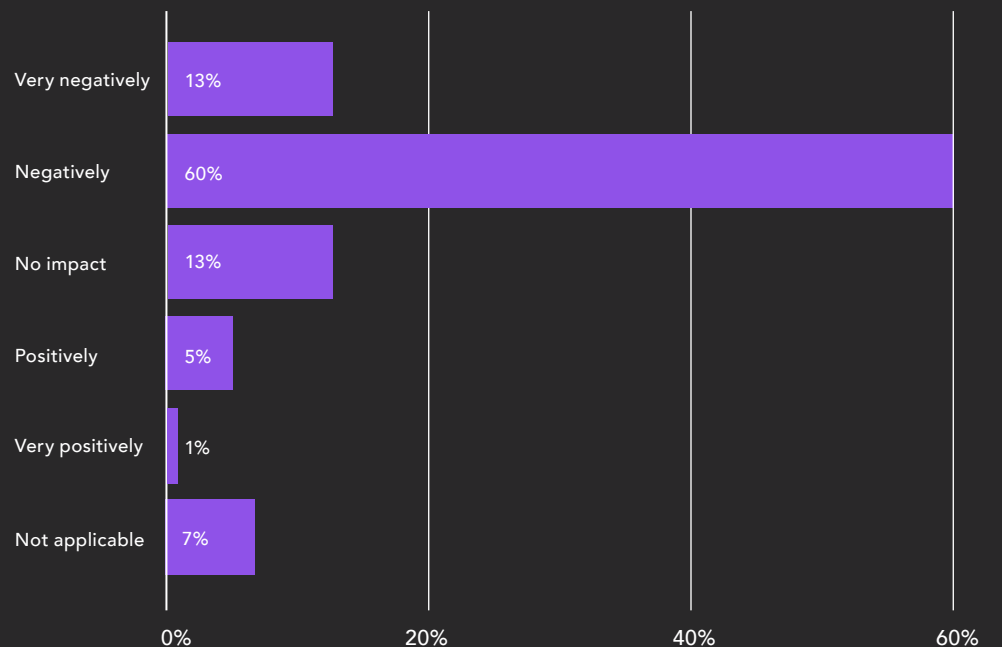




Airport experience

- Customers feel a general sense of nervousness about the airport experience because they expect health screenings to cause unpleasant queuing, prolonged processing time and invasive health screening procedures.
- Customers want reassurance that the health screenings put in place throughout the airport experience are filtering out people who are unfit to fly.
- Airlines and airports need to consider adapting a strict physical distancing procedure when boarding customers because customers are concerned that standard procedures are not sufficient.
- Customers will be more vigilant and cautious of their physical movements when navigating through the airport experience, to ensure they limit what and who they come into contact with.
- Customers are less likely to purchase food, beverages, and retail products because they are concerned about how these items might have been handled.
- Premium customers are more likely to take advantage of lounge access because of the priority boarding process and minimised contact with other customers within the airport.

How do you think Covid-19 will impact the airport experience over the next 12 months?

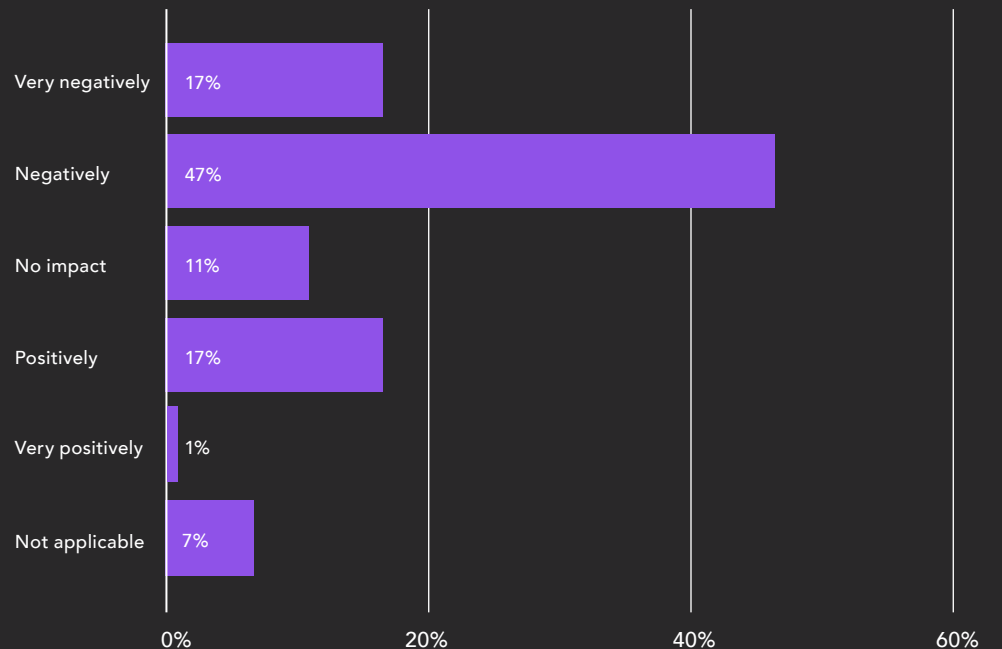




Inflight experience

- Customers believe the inflight experience will be less engaging and convivial because crew interaction will be minimised and customers onboard will keep to themselves to comply with physical distancing guidelines.
- Customers need clarity on the cabin regulations and guidelines around physical distancing when it comes to waiting for the restrooms, using overhead lockers, and generally moving throughout the cabin, and will be looking for cabin crew to enforce this.

How do you think Covid-19 will impact the inflight experience over the next 12 months?

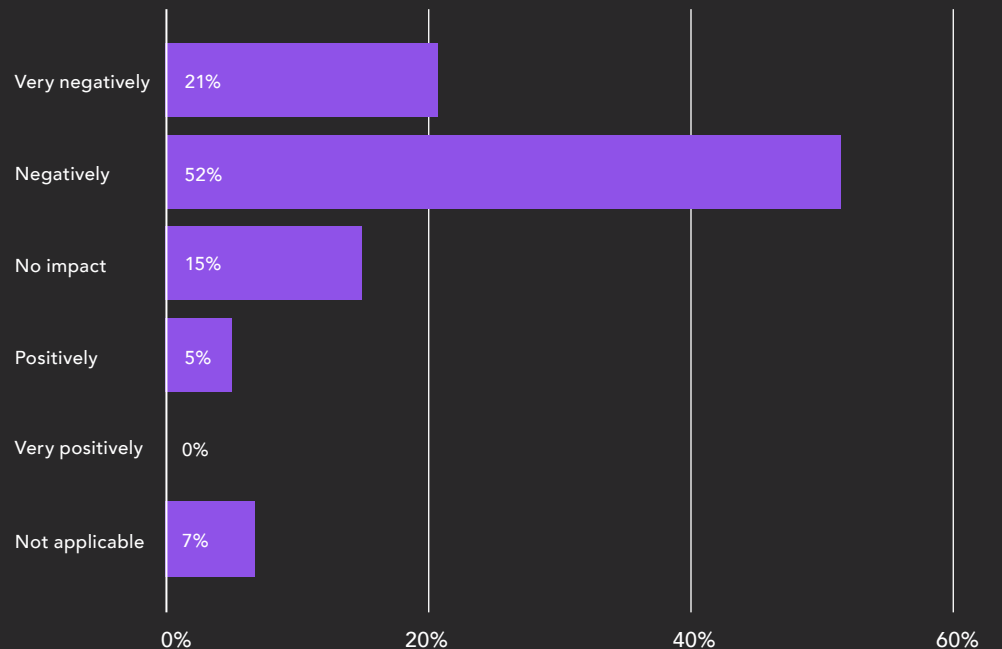




Arrivals experience

- Disembarking customers from an aircraft is likely to take longer due to physical distancing regulations.
- Customers expect to experience stricter border controls and immigration which will delay processing and increase stress.
- Customers feel anxious about the uncertainty on how overseas destinations will process inbound travellers and would like more clarity on what type of experience to expect.
- Without clear and concise information, customers are unsure about the quarantine protocols they need to follow when entering another country.

How do you think Covid-19 will impact the arrivals experience over the next 12 months?



Trust and confidence

The key insight identified from our research was the need for a framework which airlines, airports, customers, and affiliated service providers can leverage to establish an environment of trust. This will enable customers to make travel decisions with increased confidence, and embark on their journey feeling informed and in control.

As a result, we have developed a draft framework consisting of four components that individually contribute to establishing trust and confidence, and will ultimately contribute to keeping people safe throughout the experience.





Commitment model

The commitment model defines a set of attributes or factors that customers consider when assessing options during the plan and book phase of the customer experience.

Necessity to travel

What is the underlying driver for travel, and is the travel essential?

Refund policies

If circumstances change, will service providers refund customers for all or part of their bookings?

Trusted providers

What visibility of hygiene and physical distancing measures are there, and how confident are customers that service providers will adhere to them?

Insurance cover

What level of insurance cover is available/affordable, and does it provide customers with the confidence to book knowing they are covered if their circumstances change?



Destination risk profile

A destination risk profile is a set of factors that customers can consider when choosing a destination and assessing the risk associated with travelling to that destination. If we fast-forward to how this component of the framework could be implemented, we can imagine a set of metrics that provide a simplistic measure from which customers can assess risk.

Prevalence and rate of infection of Covid-19

What is the current rate of infections, and how is it changing?

Ability to get home

How easy is it for a customer to leave a destination and make their way home in the event of an outbreak or border closures? Most likely measured by time, cost and route directness.

Access to healthcare

How supported will the customer be if they become unwell at their destination?

Population density

Will the population density of the destination impact the customer's ability to maintain physical distancing guidelines?

Lifestyle factors

What is the hygiene culture of the location they are visiting, and does this result in an increased risk of infection?

Intergovernmental relationships

What is the status of the intergovernmental relationships between the customer's home country and that of their destination, and how might this impact the customer if things took a turn for the worst?



Fit to fly

Prior to travel, this component of the framework gives customers the confidence that they and their fellow travellers are fit to fly. Being fit to fly looks beyond an individual's health status and includes the traveller's preparedness for what they will experience during their trip.

Health status

Is the customer well enough to travel?

There will be health screening to determine if the customer appears to be unwell or has symptoms consistent with Covid-19. Some jurisdictions may have digitised services making this process less dependent on in-airport screening.

One of the biggest challenges with establishing travellers health status will be the management and disclosure of confidential information. We recognise that customers may not be willing to disclose whether or not they have had, or been exposed to Covid-19, so customers are expecting they will need to participate in health screening during airport processing.

Protocol adherence

Does the customer know how to behave during the experience?

Is the customer aware of the protocols required to navigate the airport and inflight experience safely, such as physical distancing, basic hygiene practices, and how to manage interpersonal interactions in busy and confined spaces?

Destination awareness

Is the customer informed about restrictions they may experience on arrival?

Is the customer aware of measures they may be exposed to on arrival at their destination, such as health screening, observing quarantine/self-isolation requirements, or immigration/travel restrictions imposed by governments to protect their resident populations?



Inflight trust model

Once onboard, the inflight trust model provides a set of activities and measures that can be taken by airlines and customers to reduce inflight anxiety levels and actively contribute to positive interpersonal interactions during the flight.

Hygiene

Hygiene covers demonstrable preflight and inflight cleaning measures, ensuring that customers have little or no physical contact with other passengers' belongings and providing reassurances that food safety guidelines are adhered to.

Airlines will need to develop cues that provide customers with the confidence that their seat has been sanitised, food has been handled safely, and bathrooms are regularly cleaned. Consideration should be given to whether or not airlines make face masks available within amenity packs.

Health

Customers reasonably expect their fellow passengers to be healthy enough to travel with minimal risk of spreading illness.

Space

Customers expect that the inflight experience will be less populated to ensure that passengers are able to adhere to physical distancing guidelines.

This has a massive economic impact on airlines as customers are expecting there to be fewer people onboard. This may impact route viability in the short and long term.

Behaviour

One of the most difficult aspects of the inflight trust model is establishing behavioral guidelines for customers and crew to follow. Given the heightened levels of anxiety we expect customers to experience, it is essential that they are respectful to each other and crew.

Airlines will need to consider how they encourage customers and crew to be kind and respectful whilst having procedures in place for the management of customers who exhibit poor behaviour.

Where to from here?

In the time it's taken for us to synthesise and publish our research we've seen domestic travel activity increase and anecdotal evidence that customers are already adopting pre-Covid behaviour when navigating the domestic air travel experience.

What's clear to us from the research is that airports and airlines need to develop a robust operational framework that gives customers the confidence to fly, underpinned by flexible products that reduce the risk of booking in an uncertain environment.

As with much of our post-Covid world, there's a lot of uncertainty, and as travel restrictions are eased and international borders open, the needs of customers will change and the industry must be poised to respond to those needs with agility and confidence.

In our view the industry response needs to consider the following four guiding principles.

Inform

Customers crave information – it gives them confidence, lowers anxiety, and sets expectations. Be concise, transparent, and accurate.

Self responsibility

Ensure that customers understand that we all have a part to play, that they must take responsibility for their own safety and take reasonable precautions to keep themselves and their fellow passengers safe.

Be kind

Encourage empathy and tolerance from travellers and provide training for staff in dealing with increased anxiety of customers and staff alike.

Be flexible

Products need to be inherently flexible and provide protection for customers in the event that circumstances change and travel restrictions are reinstated. If products are inherently flexible it will give customers more confidence to fly.

If you'd like to talk to us about this research please contact us at research@purpleshirt.co.nz.

About Purple Shirt

Purple Shirt is New Zealand's foremost user experience consultancy. Since 2011, Purple Shirt has developed a full stack service model – we cover all your bases from research, strategy and design through to product management and delivery.

We're different because we've learnt how to bridge the gap between research, design and delivery, we're fast-paced, pragmatic and dedicated to delivering world-class experiences.

We have over ten years experience working in the aviation industry and have been privileged to work with some of the world's leading aviation businesses including Air New Zealand, Gentrack Veovo, Panasonic Avionics and Auckland International Airport.

For more information please email us at research@purpleshirt.co.nz or visit www.purpleshirt.co.nz/aviation