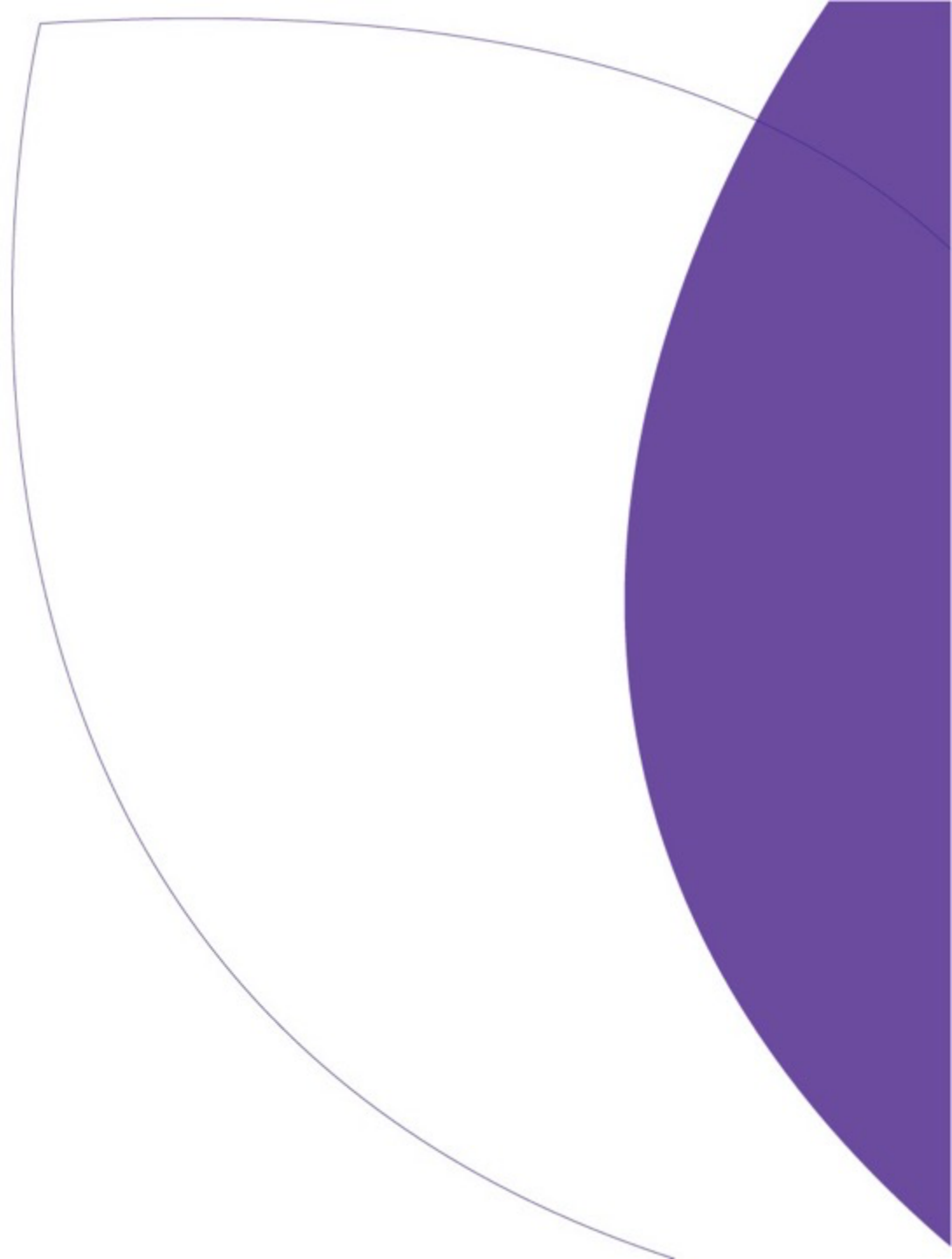




**KPI.**Aviation Marketing Solutions

# The new Personas of Air Travel in North America

December 2020



# Providing Insights to evolve the Customer Journey

- ➔ KPI has undertaken four waves of its online passenger survey across North America in the last six months and has developed a broad understanding of passenger expectations at airports across North America, and in particular the variations across the regions, not only between the US and Canada markets, but also within the US.
- ➔ What we are presenting here is only a small part of the information and analysis from our surveys. We are continuing to develop our insights through a new set of personas that we include in this report. We study the way they interact and engage at all touchpoints across the airport journey, while drilling more into their needs and expectations.
- ➔ As we further develop the personas, this will provide valuable market intelligence to airports on how to rebuild and enhance their customer journey and to communicate effectively with passengers, both of which will help to restore and develop confidence to travel again. Moreover, it will assist airports to design and implement actions to maximise engagement and revenue from commercial activities – whether that is parking, F&B or Retail.
- ➔ If you would like more information, or to get involved in our further surveys please get in touch and we can explore how KPI can support your airports recovery through 2021. ([mark.povall@kpiams.com](mailto:mark.povall@kpiams.com))

# New Personas for the new 'Travel Normal'

➔ Over the past years, airports around the world have been producing ever more sophisticated passenger segmentations and more recently, building personas has assisted them in better understanding their customers by adding more qualitative attributes, including socio-demographic, psychographic and behavioral data sets.

➔ Personas provide a much richer qualitative picture of a typical 'fictional' passenger, animating their personality and values. They enable the creation of a detailed story around the actions and motivations of that passenger, and assign them a value, through a combination of quantitative data and qualitative data. The result is the ability to deliver more customized products and services that improve the passengers' travel experience and increase their satisfaction.

➔ The "New Travel Normal" has changed and re-prioritized the needs and desires of passengers, particularly as the COVID19 factor seems to be with us at least for the near future, and these changes have been apparent in KPI's surveys since May. Over the past six months, we have recorded the new attitudes and behaviors of our air passengers with regards to air travel and created a fresh set of personas who we believe can assist airports re-invent their customer experience journeys and restore confidence in air travel.

# Survey Background

- ➔ In May 2020, KPI initiated an online survey targeting air travelers across North America which gained useful insights into passenger expectations and actions. As we felt the dynamic nature of the pandemic's impact globally, we conducted regular waves of the survey [July, August and September] aiming to understand the evolving trends regarding travelers' sentiment towards the current and future state of air travel.
- ➔ We accomplished this by talking to passengers across North America and asking about their current and future behaviors, attitudes, and beliefs about air travel and the airport experience.
- ➔ Based on the results of the surveys, it became quickly apparent that passengers - who had traveled the past twelve months - had been reconsidering their decision-making process for air travel, and subsequently their propensity to fly, using as the key choice factor their approach towards COVID-19.
- ➔ We therefore incorporated into our questionnaires behavioral and psychographic questions that allowed us to build the profile of new personas that reflect the new needs, desires and attitudes towards air travel in general, but also to the specific products and services offered by airports.
- ➔ This presentation describes the four main personas and compares them with regards to some of the key questions we have been asking over the past five months.

# Survey Details

- The survey took place between May and September 2020, with 2,049 respondents completing the survey online. It focused on air travelers in the USA and Canada who had flown at least once in the past twelve months either domestically or on international flights.
- The results of this report relates to the September wave from 522 respondents: 80% from the USA and 20% from Canada. The male to female ratio was 50:50, with an average age of 42 years old, and respondents having taken an average of 3.7 trips per year.
- To ensure the representativeness of the sample, quotas on age, gender, traffic type (international and domestic) and reason to travel were implemented.



Online survey



May – September 2020



418 US travelers

104 Canadian travelers



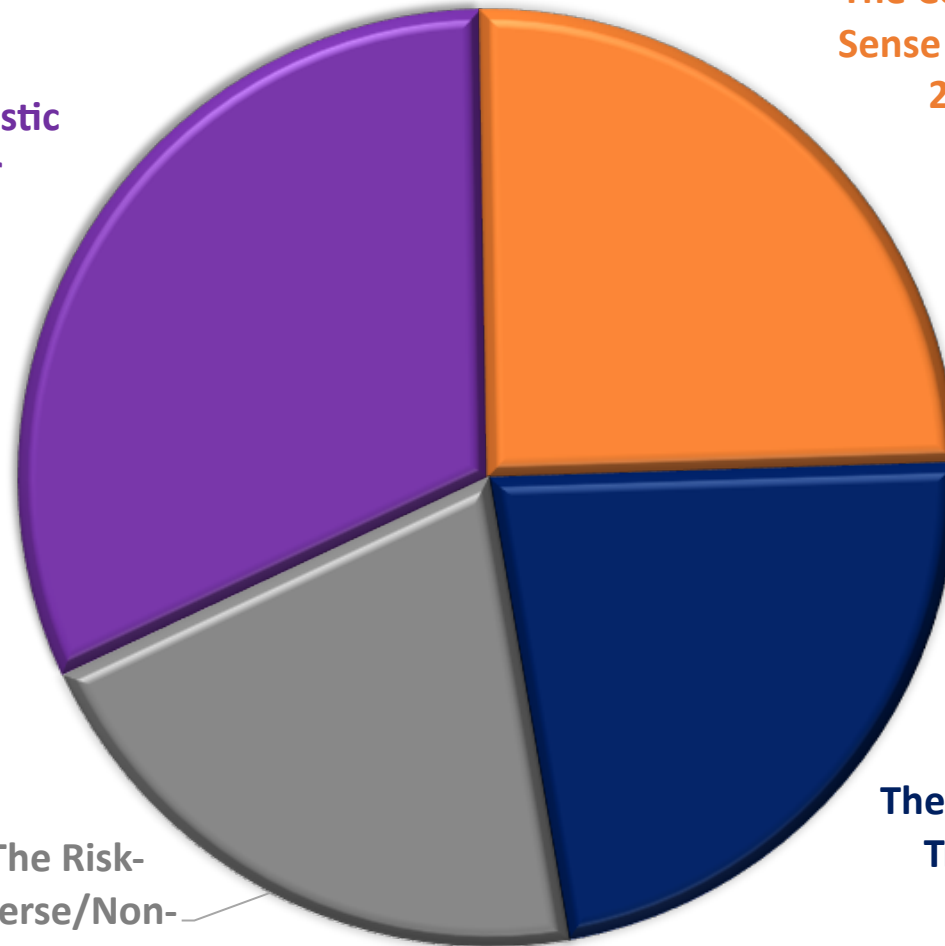
# The New Personas



**The Optimistic  
Traveler  
31%**



**The Risk-  
Averse/Non-  
traveler  
21%**



**The Common-  
Sense Traveler  
25%**



**The Cautious  
Traveler  
23%**



Overall, more respondents (31%) fall within the Optimistic Traveler persona, but 44% are cautious, risk averse or not traveling

# The Optimistic Traveler

*"I have returned to air travel and will travel at similar levels to the pre-COVID era if flights are available regardless of the restrictions in the airport or at the destination."*



## Bio

I'm **Michael**, I'm **40** and live in **New York**. I used to be an avid frequent flyer domestically and internationally. I am currently traveling for business, but also take vacations flying to my favourite destinations, mostly domestic. Travel is part of my life and I have not stopped traveling since April.



## Approach to Air Travel

- I am aware of COVID19, but I am happy to travel if I know all precautions are being taken
- I trust that airports and airlines are taking the appropriate precautions
- I feel that aviation is doing more for COVID-19 than other transportation means



## Airport Experience since April

- 74% have flown at least once
- Still enjoying the experience
- Journey is more complex
- Journey takes more time
- Staff are friendlier

## Needs and Wants

- I need my lounges, quiet areas and the airport to be clean and sanitized
- I want to be informed before I arrive at the airport
- I want to know about the processes and the waiting times in all touchpoints

## Shopping and Dining

- Information on safety and cleanliness of retail/F&B
- I feel safe buying my food at the airport
- I would prefer to buy food at the airport before I fly
- Will continue to shop from retail stores as before
- Contactless and digital interaction would be a plus

## My Favourite Communication Means



Airline Website



Airport Website



Social Media

# The Common-Sense Traveler

*“I have returned to air travel but will take necessary precautions during my journey. The number of COVID cases and restrictions at my destination will impact my flight choice.”*



## Bio

I'm **John**, I'm **33** and live in **Miami**. I used to be a frequent flyer and I currently travel mostly for business, or to visit my loved ones, friends and family when necessary. I miss air travel, and since April I have only flown when I really had to, mostly domestically.

## Approach to Air Travel

- I am aware of COVID19, but I am somehow happy to travel if I know all precautions are being taken
- I feel that most airports and airlines are taking the appropriate precautions
- I am disappointed that there is no a cohesive approach by airports to tackle COVID-19

## Airport Experience since April

- 53% have flown at least once
- Journey is more complex
- Don't really enjoy the experience anymore
- Journey takes slightly more time
- Staff are mostly friendlier



## Needs and Wants

- I need to know the airport's overall cleaning and sanitization practices
- I want to see that all required travel protocols and regulations at the airport are in place
- Quiet areas would be good to have at airports, as well as ways to reduce crowds

## Shopping and Dining

- Information on safety and cleanliness of retail/F&B
- I have reservations for buying my food at the airport
- Only occasionally would I buy my food at the airport before I fly
- Retail and F&B is not a priority for me
- Contactless and digital interaction would be a plus

## My Favourite Communication Means



Airline Website



Social Media



Airport Website



# The Cautious Traveler

*“I will only take a flight if it is absolutely necessary, taking all precautions required. I will await the easing of restrictions and reduction in cases before I fly more regularly.”*



## Bio

I'm **Martha**, I'm **42** and live in **Atlanta**. I previously traveled but not very frequently and primarily for leisure and within the US. I have limited now flying. It will take me at least six months before I fly again, and if needed earlier taking the maximum precautions.

## Approach to Air Travel

- I am not happy flying at this point
- I feel that most airports and airlines are taking the appropriate precautions
- I will do a lot of research before I travel going through airline and airport websites and news media

## Airport Experience since April

- Only 21% have flown since April



## Needs and Wants

- I need to know the airport's overall cleaning and sanitization practices
- I want to know beforehand all required travel protocols and regulations at the airport and at the destination
- Airports must manage the crowds

## Shopping and Dining

- Information on safety and cleanliness of retail/F&B is good to have, but I am not planning to use their services
- I have strong reservations for buying my food at the airport
- Contactless and digital interaction are interesting concepts

## My Favourite Communication Means



Airline Website



News Media



Airport Website

# The Risk Averse/Non-Traveler

*“I am not willing to return to travel until the air travel restrictions are eased, the number of cases has dropped significantly or there is a readily available vaccine. Once the medical professionals indicate it is safe to fly I will return but at reduced levels to previously”*



## Bio

I'm **Joanne**, I'm **56** and live in **Indianapolis**. I used to travel once a year for leisure across the United States or to see my family. I have stopped traveling since April and I don't see myself flying soon.

## Approach to Air Travel

- I will wait until COVID-19 has been defeated and a vaccine is available before I begin to travel again
- I have not been convinced that airports and airlines are taking the appropriate precautions
- I will do a thorough research before I travel going through airline and airport websites and news media



## Airport Experience since April

- 10% have flown since April but generally only due to an emergency

## Needs and Wants

- I need to be informed about the airport's overall cleaning and sanitization practices
- I want to know beforehand all required travel protocols and regulations at the airport and at the destination
- I would like the minimum interaction at the airport in any touchpoint and ample space with no crowds

## Shopping and Dining

- I am not interested at all in shopping or dining at the airport
- There is a very small chance for buying my food at the airport
- Contactless and digital interaction are interesting concepts

## My Favourite Communication Means



Airline Website



Airport Website



News Media

# Main Findings



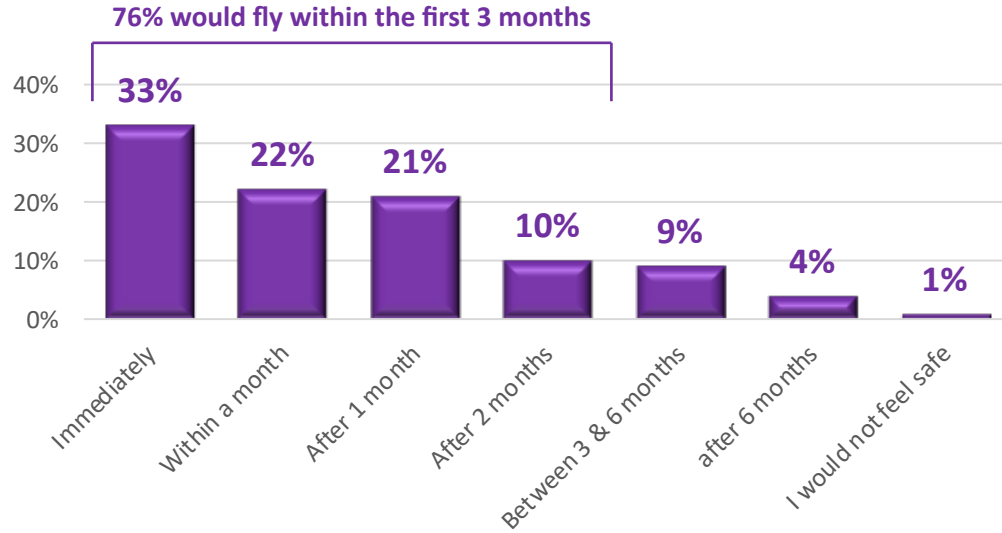
# Key Findings

- ➔ There are currently two key elements that will define when and how the public will return to air travel: Bringing back the trust to air travelers and re-designing the passenger travel journey based on the new travel normal. Each persona has different expectations and approaches for both elements. The following findings focus on some of the attributes we have been investigating in our surveys.
- ➔ Over the past 7 months respondents have become more eager to travel, with 43% of mostly Optimistic and Common-sense travelers having already traveled. Risk-averse/Non travelers will take a long time to get back on a plane. It will be interesting in the coming weeks to record their attitudes in view of the increasing of cases worldwide in November on one hand, but also the announcement of the vaccines on the other.
- ➔ During the new travel normal, or at least until the pandemic subsides, air travelers will be using more their private cars to be dropped-off or park at the airport and will arrive earlier increasing the discretionary time at the airport. It will be important for airports to find the right way to engage with the Cautious and Risk-averse/Non travelers passengers who will be spending more time at the airport, but with no intention to use the airport's retail and F&B services.
- ➔ It is therefore necessary besides adhering to stringer sanitization measures, the airports' Retail and F&B offer and interaction be adjusted to the new needs and to contactless and digital solutions. An interesting paradox that will become a key challenge for airports is the fact that passengers will be arriving earlier than their normal routine at the airport, while not intending to use as before the available retail and F&B services.

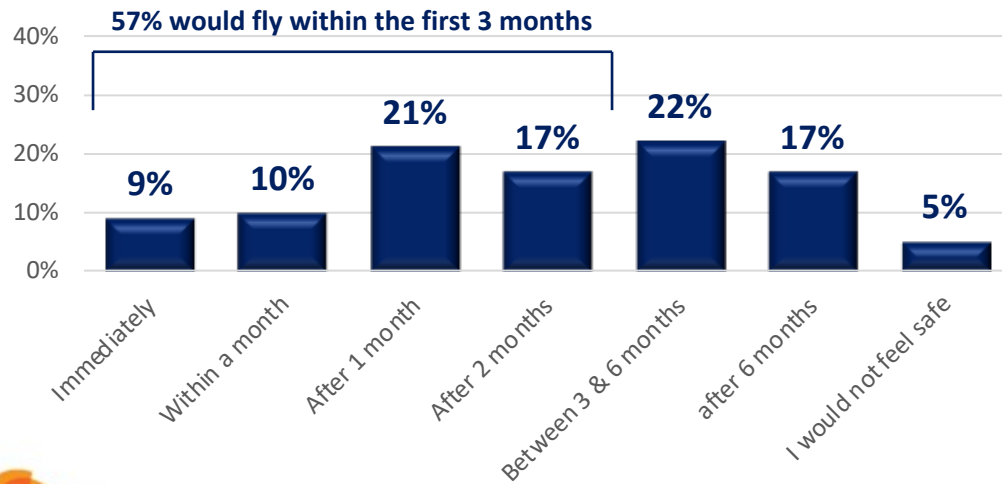
# The Likelihood of future Travel

**Question:** Assuming a trusted source, or government or medical official said it was safe to fly, how soon would you feel comfortable traveling by air?

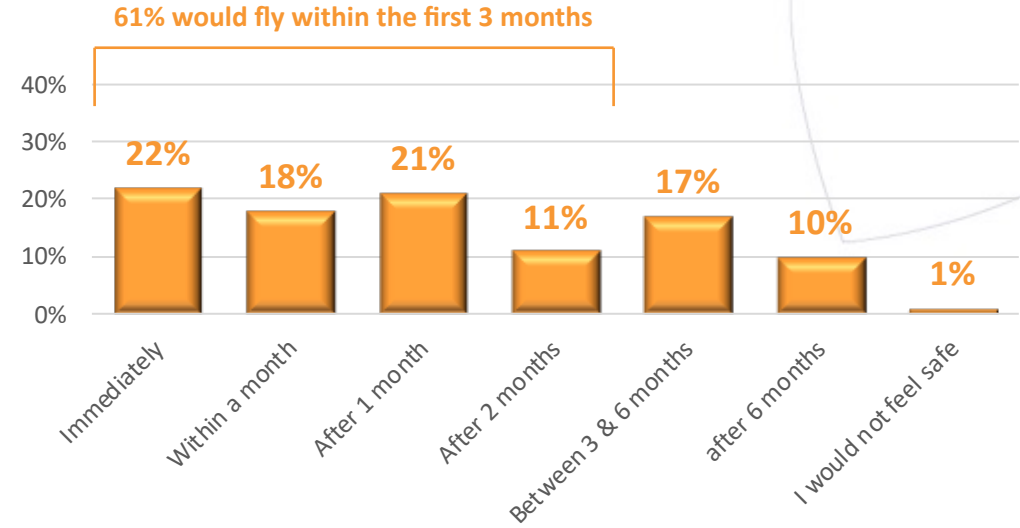
The Optimistic Traveler



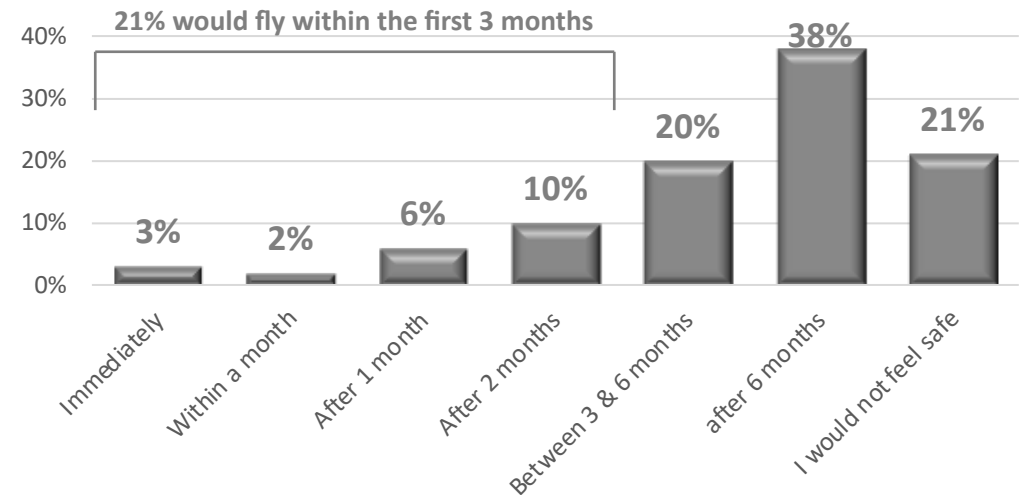
The Cautious Traveler



The Common Sense Traveler

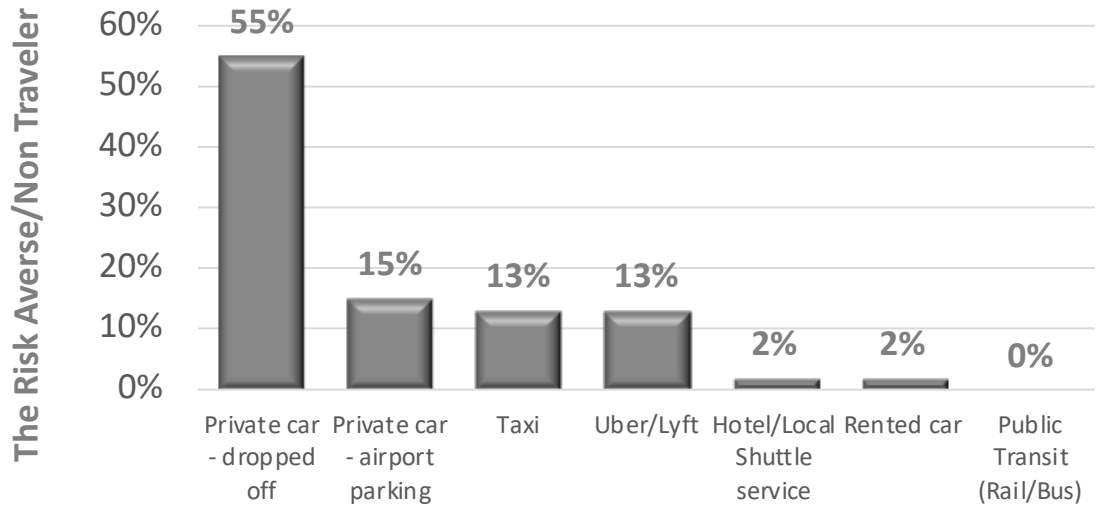
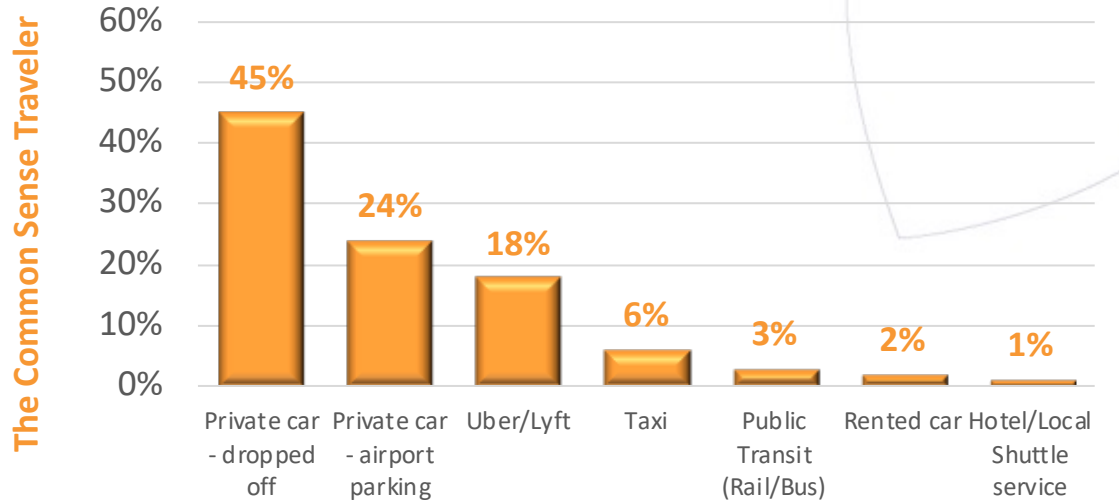
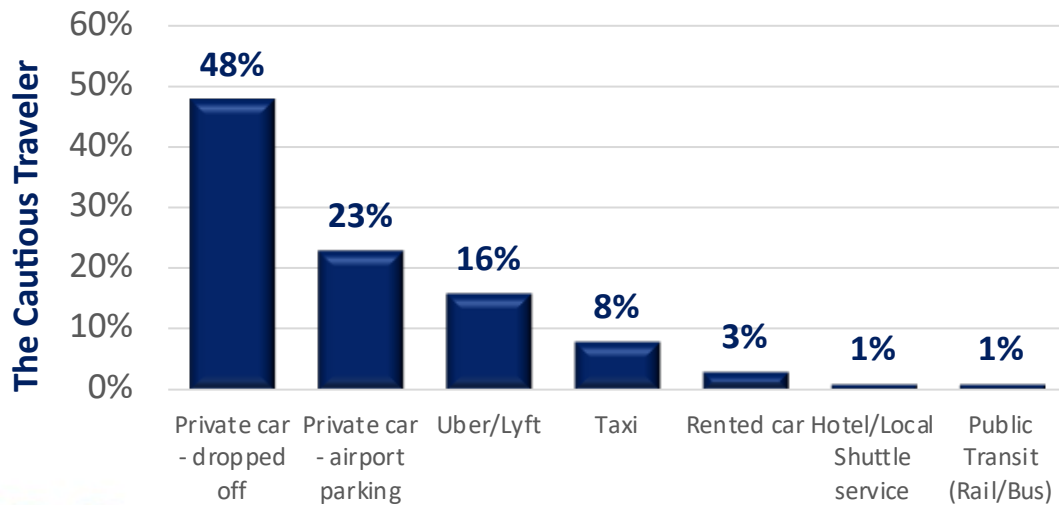
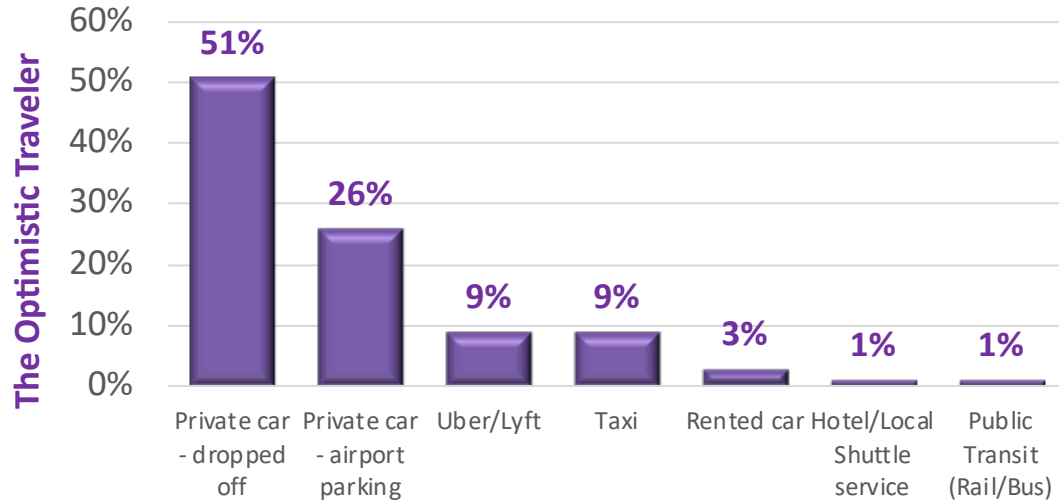


The Risk Averse/Non Traveler



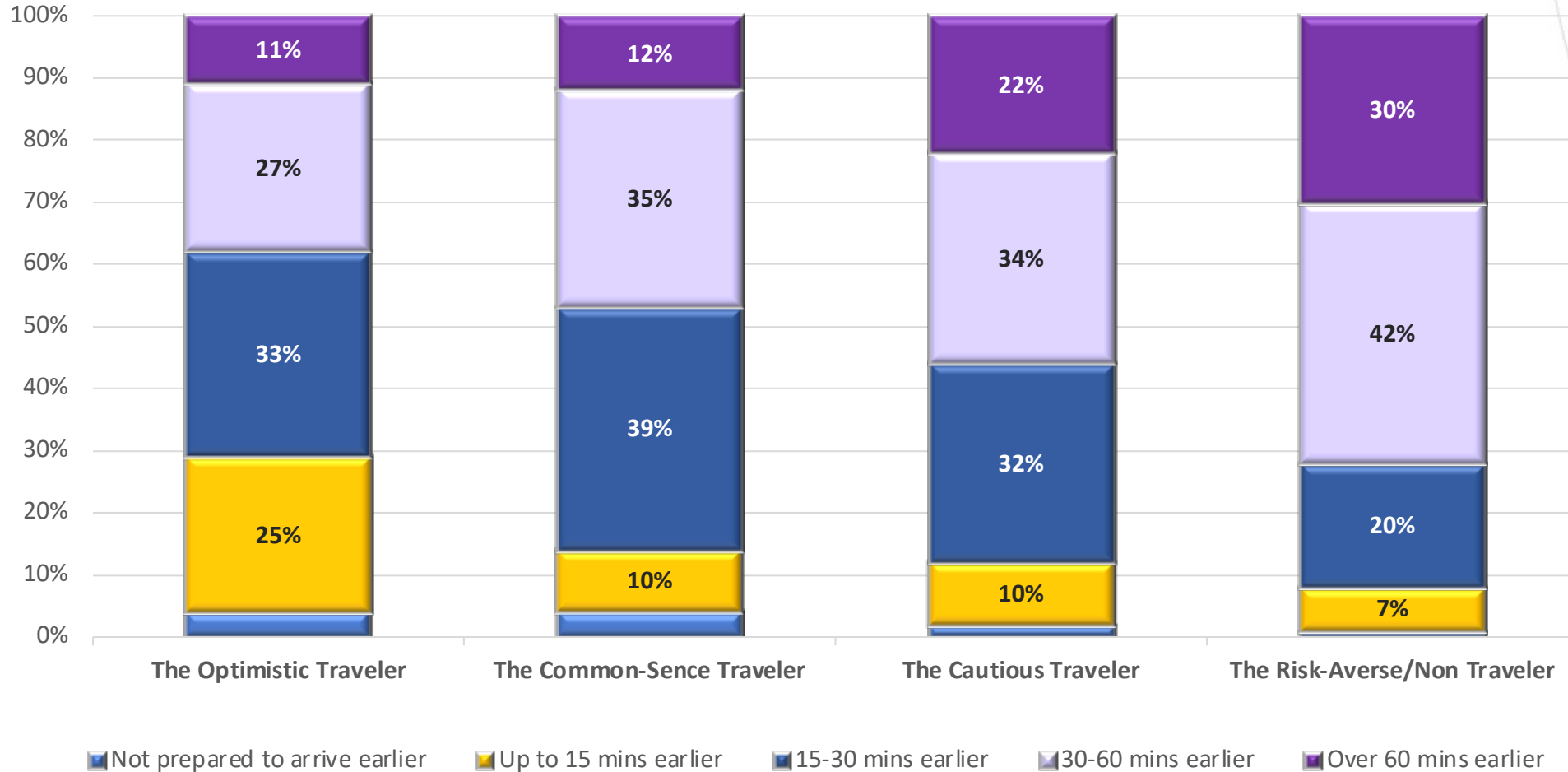
# Mode of Transport for reaching the Airport

Question: For your air travel in the next 6 months which transportation means would you prefer to use to access the airport?



# When Passengers are prepared to arrive at the Airport

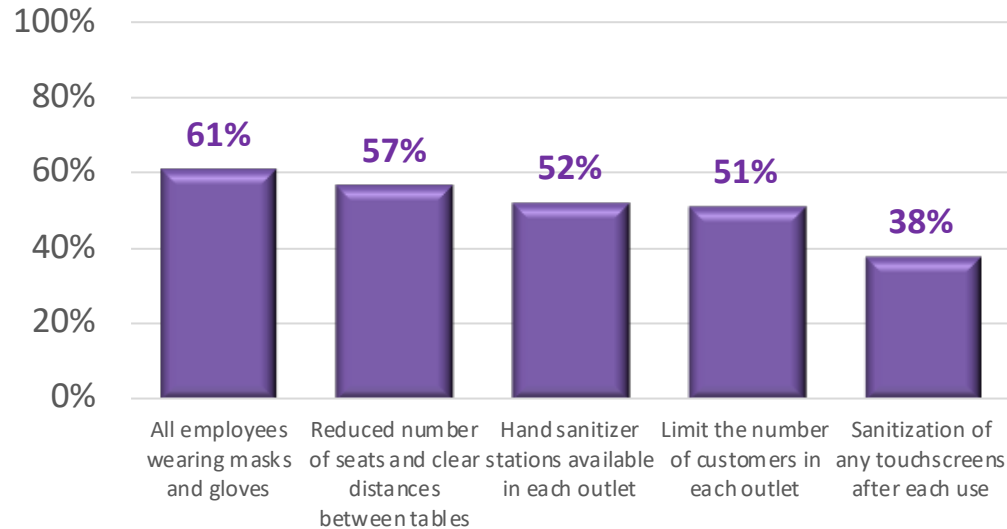
**Question:** How much earlier than your normal routine would you be prepared to arrive at the airport to complete any required new checks and procedures?



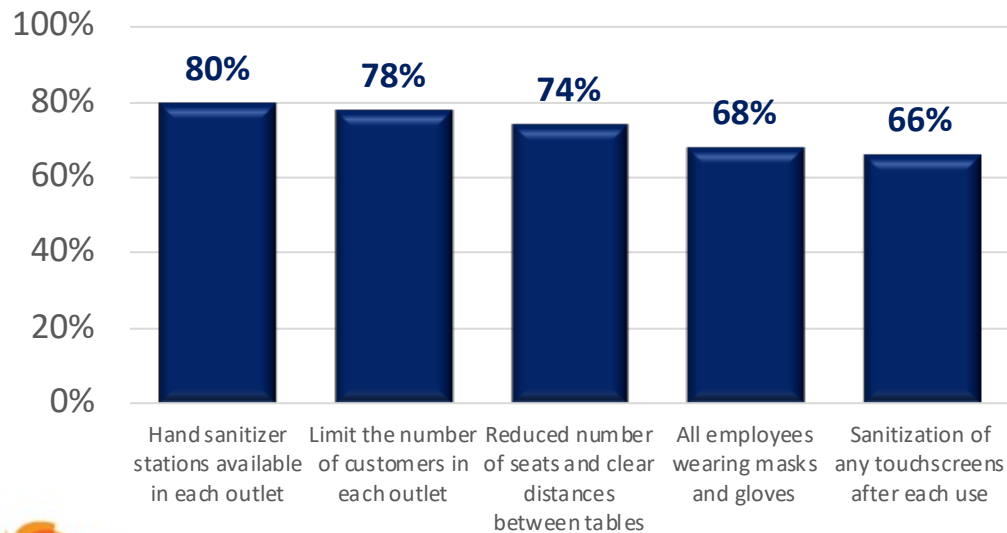
# Top 5 Expected Covid-19 Measures in F&B

Question: What are your expectations from the restaurants and coffee shops as a result of COVID-19? Select all that apply.

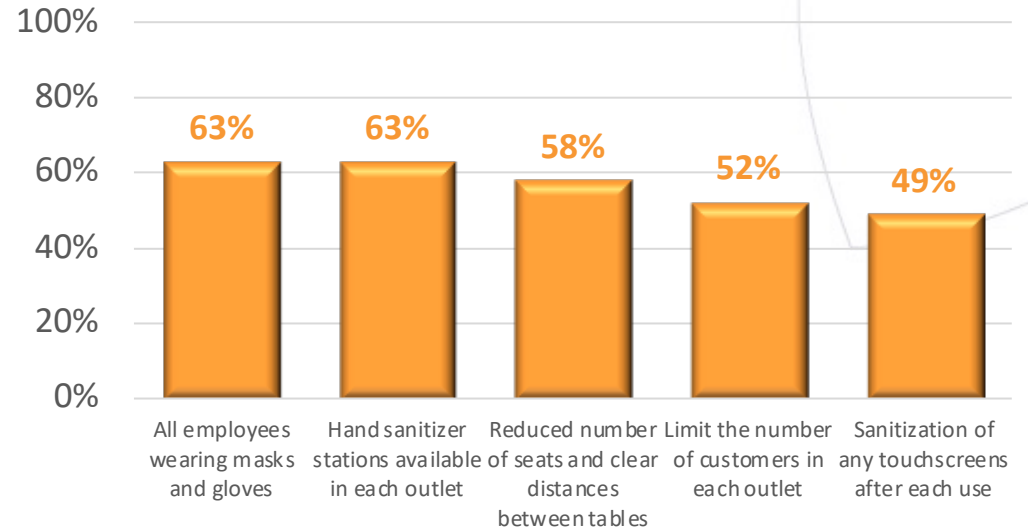
The Optimistic Traveler



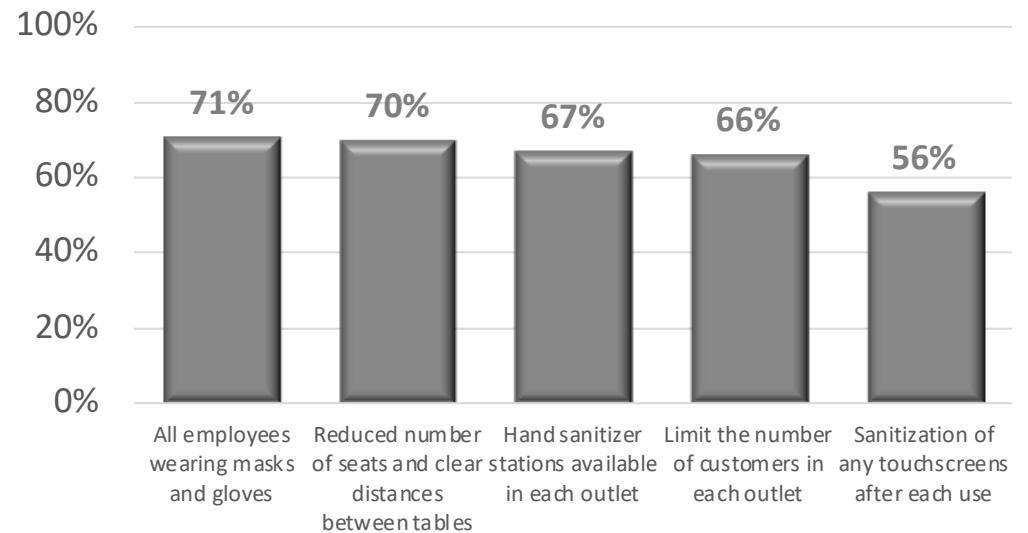
The Cautious Traveler



The Common Sense Traveler



The Risk Averse/Non Traveler





# The New Food & Beverage “Travel Normal”

**Question\*:** What products and services would you expect to see from F&B outlets at airports? Select all that apply..

## The Optimistic Traveler

Grab & Go only, no sit down available	45%
Pre-packaged food offer to take onboard	45%
Ability to order digitally in store	41%
Pre-order on app and deliver to gate	39%

## The Common-Sense Traveler

Grab & Go only, no sit down available	52%
Pre-packaged food offer to take onboard	43%
Pre-order on app and deliver to gate	39%
Ability to order digitally in store	37%

## The Cautious Traveler

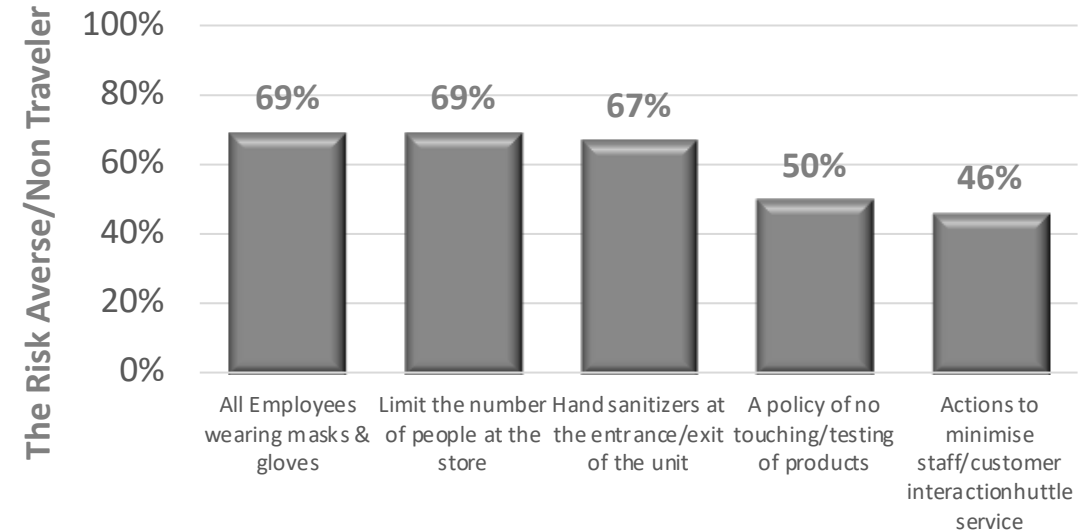
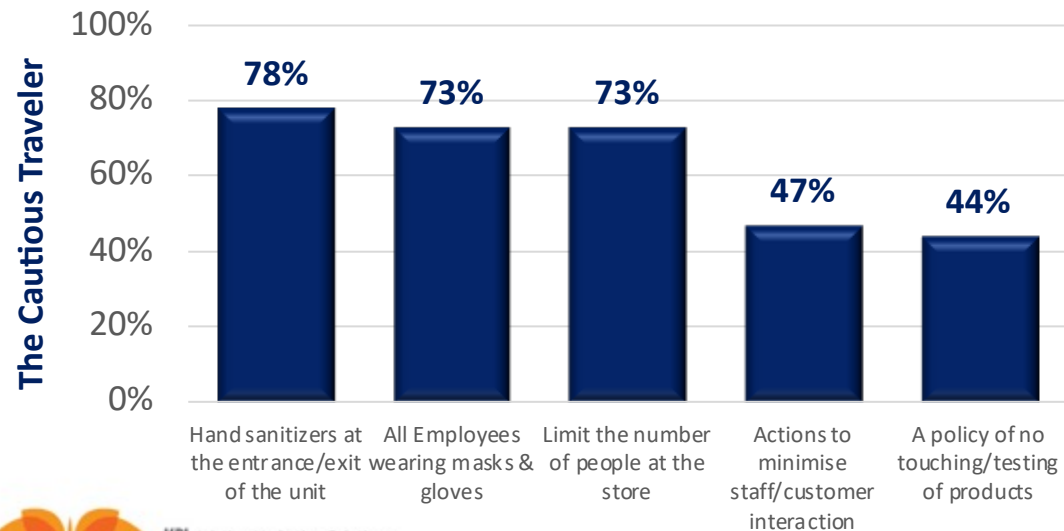
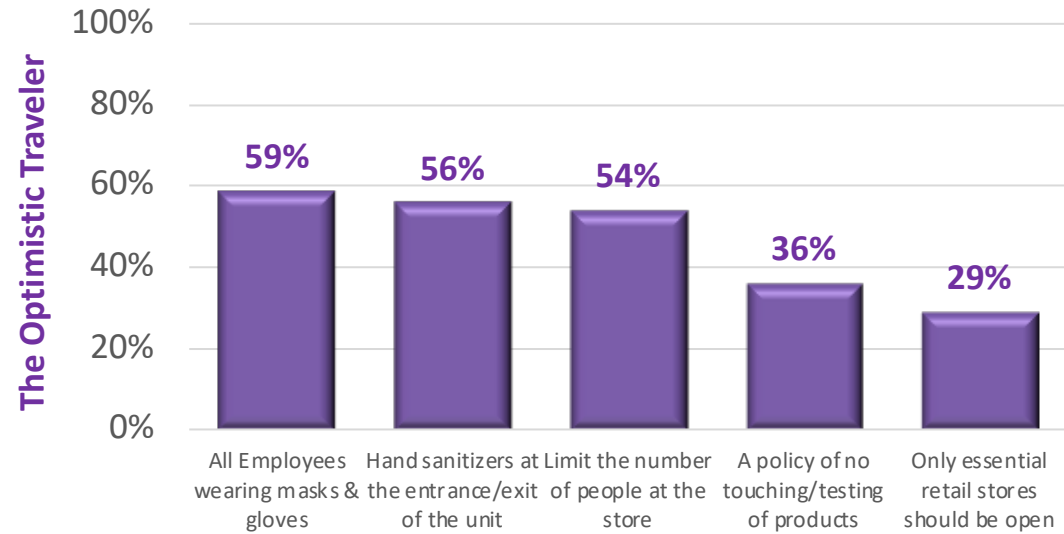
Pre-packaged food offer to take onboard	54%
Grab & Go only, no sit down available	53%
Ability to order digitally in store	43%
Pre-order on app and deliver to gate	38%

## The Risk-Averse/Non Traveler

Grab & Go only, no sit down available	61%
Pre-packaged food offer to take onboard	56%
No cash payments to be accepted	38%
Ability to order digitally in store	33%

# Top 5 Expected Covid-19 Measures in Retail

Question: What are your expectations from the retail stores as a result of COVID-19. Select all that apply.



# The New Retail “Travel Normal”

Question\*: What products and services would you expect to see from retail stores at airports? Select all that apply.

## The Optimistic Traveler

More products related to COVID19 sanitization and health (e.g. masks, testing kits, gloves)	58%
Ability to order digitally in store	48%
Pre-order on app and pickup at the gate	37%
No cash payments to be accepted	29%

## The Common-Sense Traveler

More products related to COVID19 sanitization and health (e.g. masks, testing kits, gloves)	63%
Ability to order digitally in store	41%
Pre-order on app and pickup at the gate	35%
No cash payments to be accepted	33%

## The Cautious Traveler

More products related to COVID19 sanitization and health (e.g. masks, testing kits, gloves)	70%
Ability to order digitally in store	47%
Pre-order on app and pickup at the gate	38%
Pre-order online prior to arriving at the airport	38%

## The Risk-Averse/Non Traveler

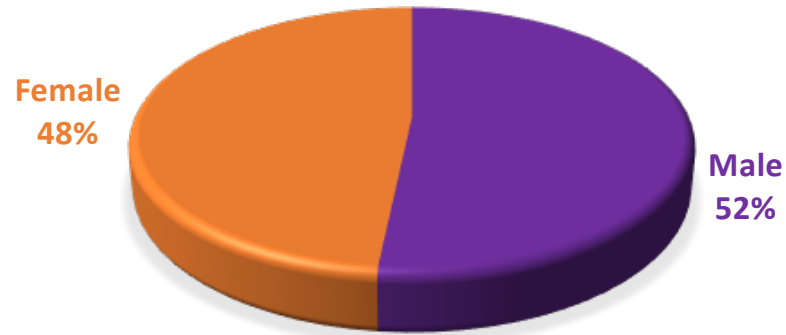
More products related to COVID19 sanitization and health (e.g. masks, testing kits, gloves)	62%
No cash payments to be accepted	40%
Pre-order on app and pickup at the gate	33%
Ability to order digitally in store	29%

# Demographics

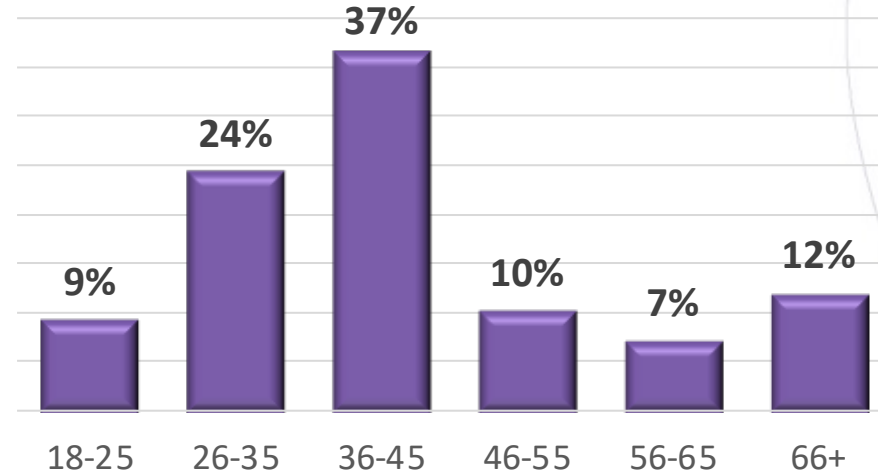


# Key Demographics of US Respondents

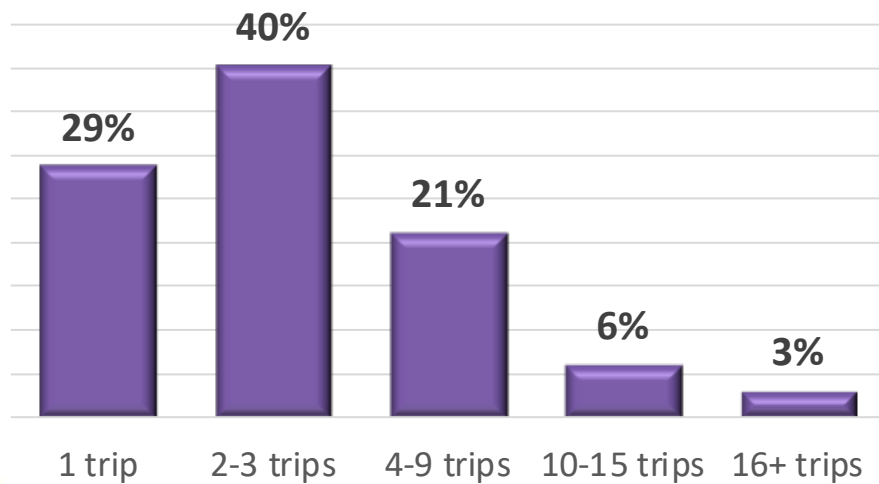
## Gender



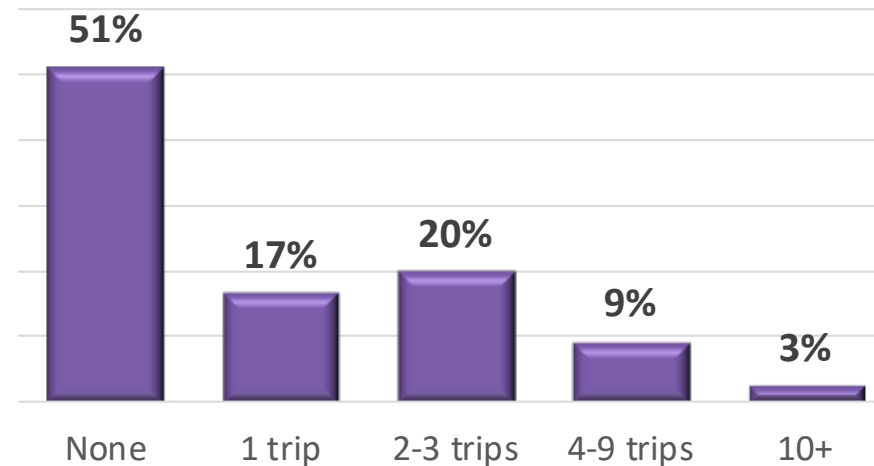
## Age Range



## Frequency of Travel

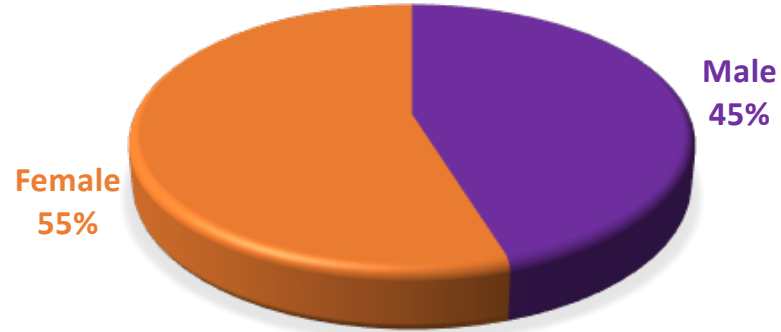


## Traveled in last 6 Months

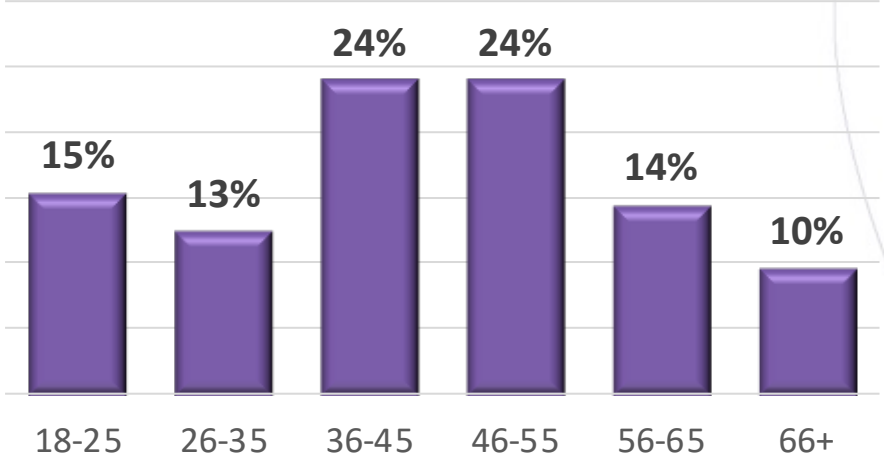


# Key Demographics of Canadian Respondents

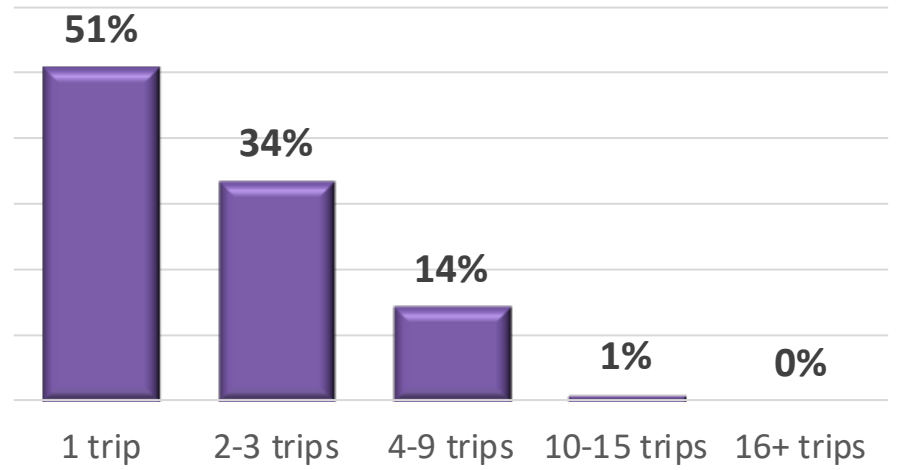
Gender



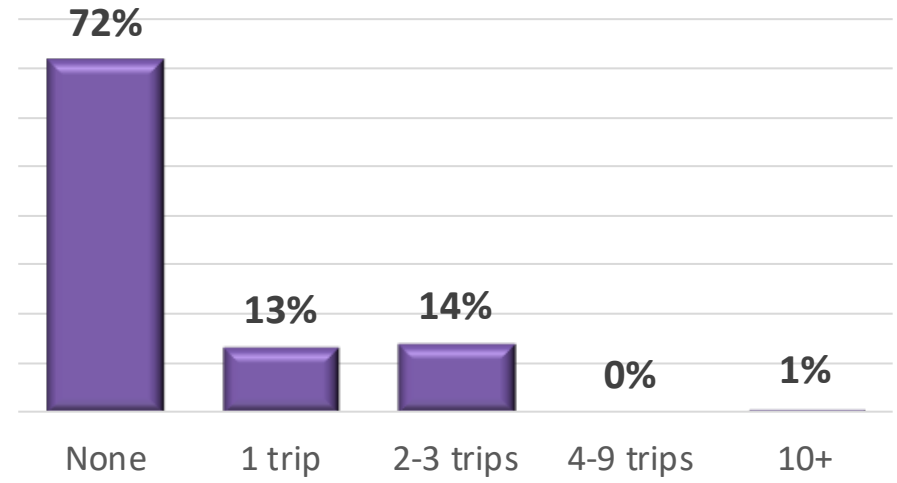
Age Range



Frequency of Travel

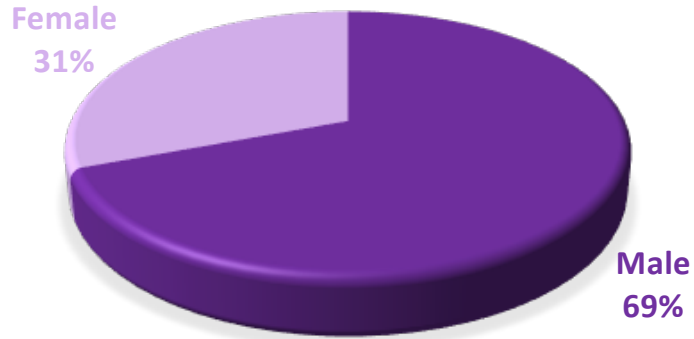


Traveled in last 6 Months

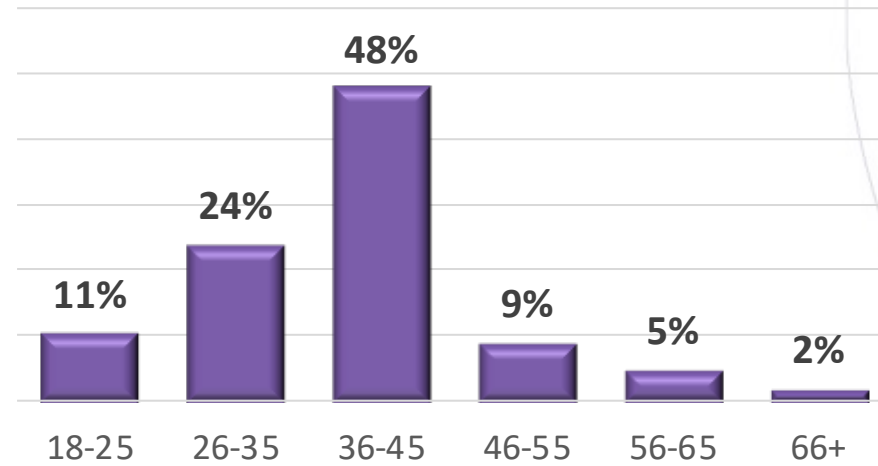


# The Optimistic Traveler

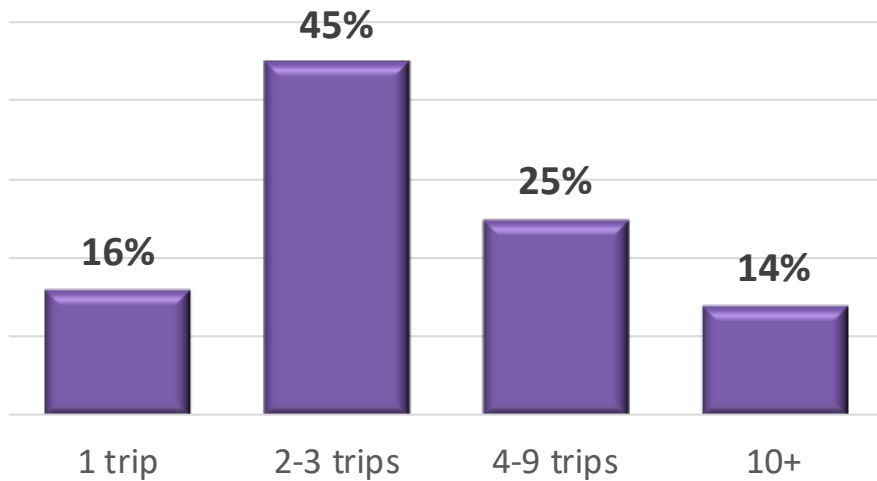
## Gender



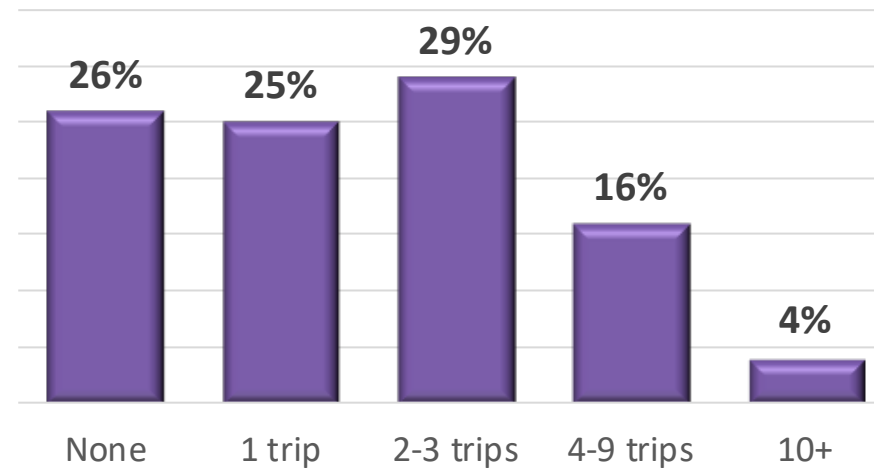
## Age Range



## Pre-Covid 19 Frequency of Travel

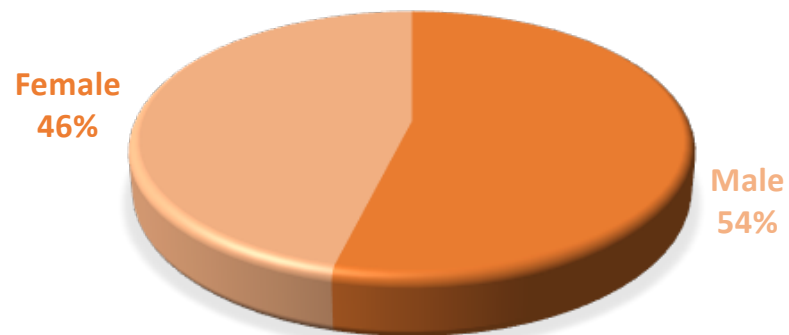


## Traveled in last 6 Months

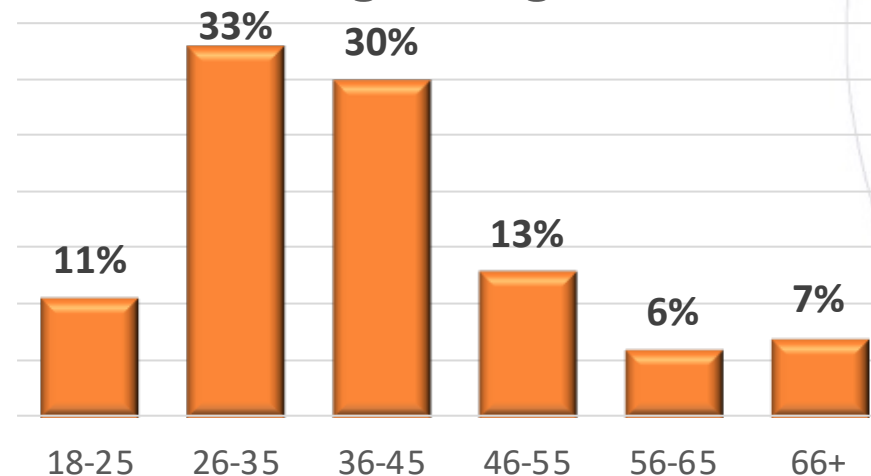


# The Common-Sense Traveler

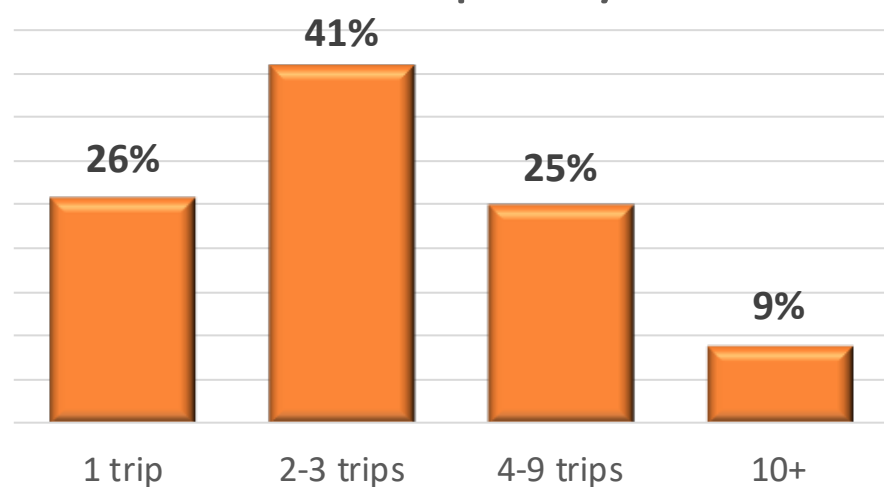
## Gender



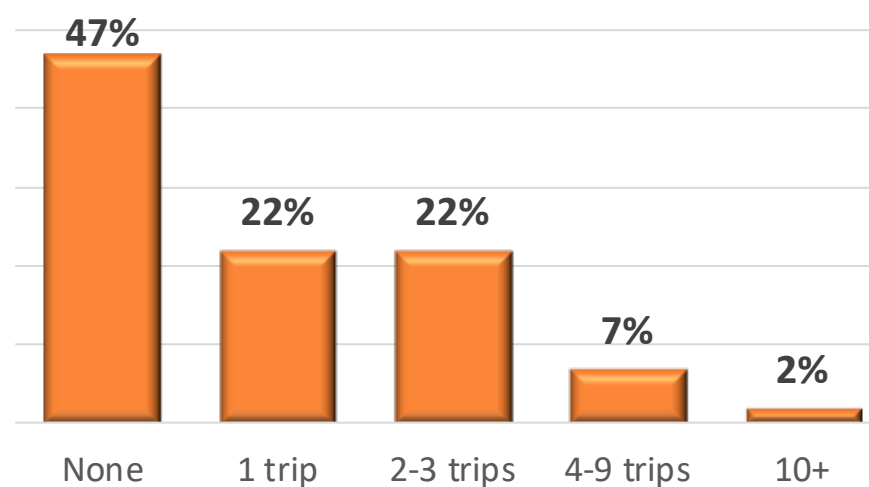
## Age Range



## Pre-Covid 19 Frequency of Travel



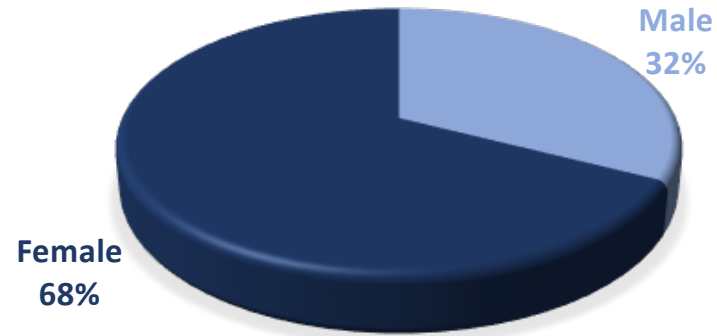
## Traveled in last 6 Months



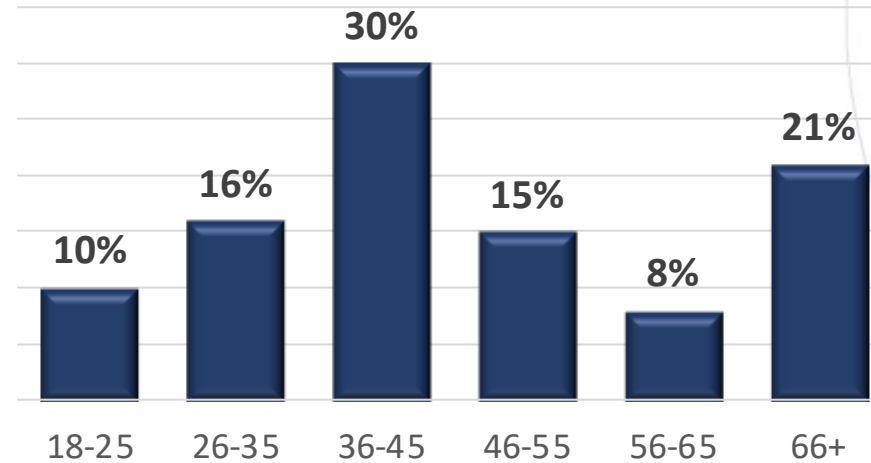


# The Cautious Traveler

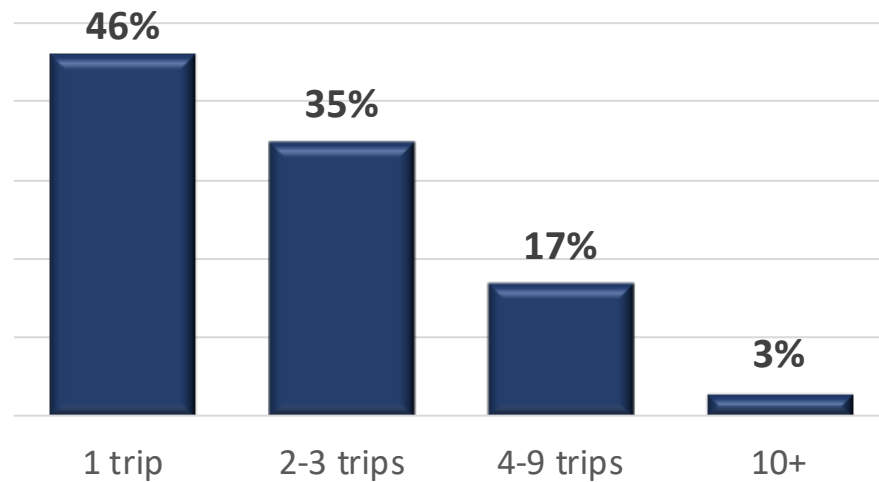
## Gender



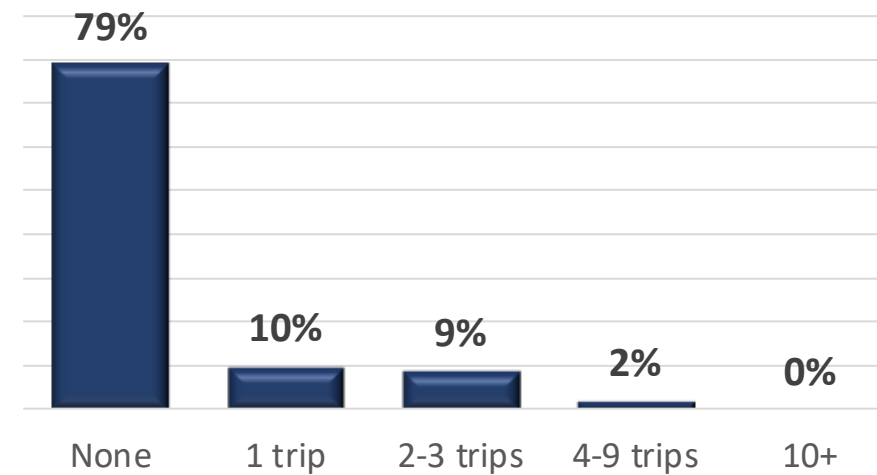
## Age Range



## Pre-Covid 19 Frequency of Travel

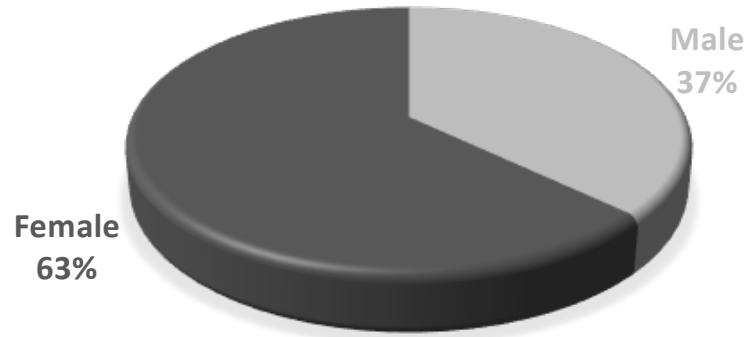


## Traveled in last 6 Months

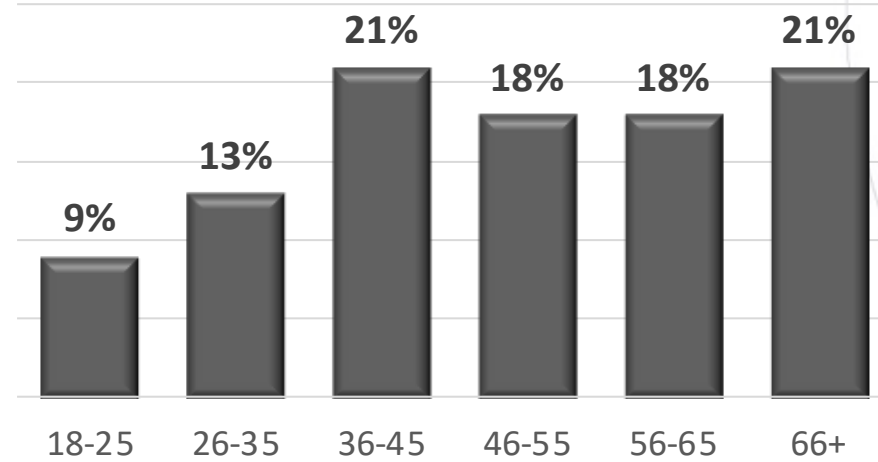


# The Risk Averse/Non-Traveler

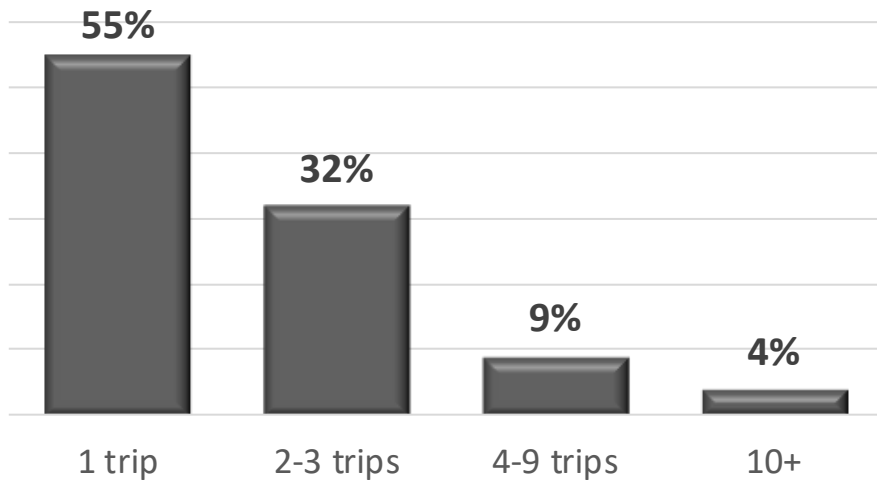
## Gender



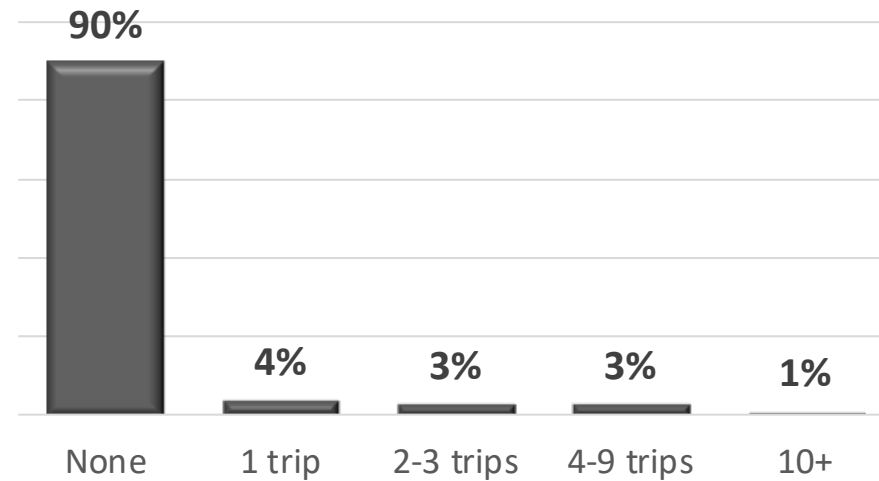
## Age Range



## Pre-Covid 19 Frequency of Travel



## Traveled in last 6 Months



For more information on KPI Aviation Marketing Solutions please visit our website [www.kpiamerica.com](http://www.kpiamerica.com), or get in touch with us directly. We'd love to hear from you.

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