



# Customer experience in the new reality

## **Perspectives from the airline sector**

Global Customer Experience  
Excellence research 2020



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# Introduction

With IATA predicting it will be 2024 before air travel returns to pre COVID-19 levels<sup>1</sup> and over 30 percent of the world's 26,000 aircrafts were grounded the air travel industry faces a crisis like no other.<sup>2</sup> The passenger experience is set to change dramatically as airlines grapple with the twin issues of cost and passenger health. Central to its recovery is the restoration of passenger confidence.

With a lengthy period of recovery predicted, airlines are having to deal with a structural change in air travel economics. The nature of the airline industry is that costs of idle aircraft run to \$ millions every day. Full-service airlines depend on the business traveler to make their economics work and low-cost airlines depend on utilization and passenger density. Both are under threat.

# 30%

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The full-service airlines that have historically led our Customer Experience rankings pride themselves on providing a high touch, personal service.

This is, however, the antithesis of a COVID-19 world where limiting touchpoints and reducing interaction between passengers and crew is a vital element of minimizing the opportunities for the virus to spread.

**With travellers afraid of catching the virus either at the airport, onboard or at a destination, passenger numbers will remain low for the foreseeable future.**

It also requires removal of the luxury symbols that attract passengers to particular airlines such as high-quality amenity kits, noise cancelling headphones, pajamas and gourmet meals which have been replaced with snack packs and personal safety kits.

The widespread adoption of video technology has enabled many businesses to operate effectively without the need for in-person meetings. International travel will face the new reality of more digital competition which will no doubt

impact the way business approach travel going forward.

Low cost carriers also face headwinds. The essence of their business model is volume. With travelers afraid of catching the virus either at the airport, onboard or at a destination, passenger numbers will likely remain low for the foreseeable future. Rapid turn round, stable flight sector planning and high levels of aircraft utilization are currently not possible with the emergence of second and third waves of COVID-19, dynamic quarantine restrictions and local lockdowns making it difficult for low cost carriers to predict destination demand.

Airlines have responded shoring up balance sheets where they can with new debt and equity, often with significant input from the state or sovereign funds, and by reducing staff costs and retiring their older, less economic, aircraft as they right size for lower passenger numbers. They are also having to fundamentally redesign the passenger experience to be touchless, contactless and socially distant.

<sup>1</sup> <https://www.iata.org/en/pressroom/pr/2020-07-28-02/>

<sup>2</sup> <https://time.com/5823395/grounded-planes-coronavirus-storage/>

# The future experience

COVID-19 will usher in a new era of air travel experience. One that differs dramatically from what has gone before. Physically speaking, banks of cleaning staff will sanitize all areas, mask wearing cabin crew will be interacting less with customers and passengers will have to wear masks for the end to end duration of their journey.

Much greater investment in self service can reduce staff passenger interactions and self-protective pouches a package that includes a mask, gloves, hand sanitizer, alcohol wipes and an information leaflet with tips on how to prevent the virus spreading, will replace amenity kits.

The pre-flight experience will also be very different. Technological advances in virus detection are already in evidence in some world airports, including a contactless voice-activated kiosk for monitoring passengers' temperature, heart and respiratory rates before check-in that has been developed by Etihad Airways.<sup>3</sup>

The technology is an early warning indicator that will help identify symptoms that can be assessed by medical experts to help prevent further contagion. The system

automatically suspends the self-service check-in or bag-drop process if a passenger's vital signs indicate potential symptoms of illness.

At some airports authorities are testing a full-body disinfection facility. In it, passengers and airport staff undergo a temperature check before entering an enclosed channel for a 40-second sanitizing procedure, using "photocatalyst" and "nano needles" technologies.

In another initiative invisible antimicrobial coatings that destroy germs, bacteria and viruses are being applied to high-touch surfaces in the terminal such as kiosks, counters and trolleys some airports are also testing autonomous Intelligent Sterilization Robots equipped with ultraviolet light sterilizers that roam the airport, disinfecting passenger facilities.

Technological advances in virus detection are already in evidence in some world airports

These developments are vital to overcome social distancing requirements that will lead to much bigger queues and therefore airport terminals to accommodate them.

<sup>3</sup> <https://www.forbes.com/sites/lauriewerner/2020/04/07/etihad-to-try-symptom-detecting-technology-at-the-airport/#5e43a2e1794c>



# The recovery pathway

Critical areas for getting aviation back on its feet include the development of agreed protocols between countries regarding safe travel which requires co-ordination of the whole ecosystem that impacts the customer journey, including pre and post flight rapid testing regimes, predictable border controls and effective treatment of any of those impacted by COVID-19 whilst traveling.

Strategically the industry faces extensive disruption for the next few years and there are several strategic questions to be answered clearly:

- How do we make every aspect of the passenger journey contactless and touch free?
- How do we respond to the rapidly growing environmental and sustainability concerns?
- What other standards of passenger safety do we need to adopt (e.g. QR codes, health assessments etc.)?
- Given the state of the industry in 2022, 2023 and 2024, how do we manage our economics and right size decisions?
- How can we keep our staff motivated and engaged during the right sizing activity?
- How do we continue to differentiate in a touchless environment?

The Six Pillar model was developed to provide a precise and practical definition of the kind of emotional outcome a successful experience needed to deliver. Based on over 4 million detailed customer reviews, The Six Pillars have been validated in 27 markets this year and modeled against the commercial outcomes of retention and recommendation. The Six Pillars are inextricably intertwined and, in combination, provide a powerful mechanism to help organizations understand how well their customer experience is delivered across channels, industries and company types. The leading organizations demonstrate mastery of these pillars and are outstanding at all of them. [Click here for more information.](#)

“

COVID-19 will usher in a new era of air travel experience. It will be more digital however with potentially more points of friction for customers in the whole travel journey from what has gone before. The airlines featured in our hall of fame are often the ones working hard to establish passenger trust during COVID-19 and demonstrate that they care about their customers, their people and the world they operate in.”

**Malcolm Ramsay**

Global Head of Aviation

The Six Pillars of Experience provide a useful checklist for airlines to plan the necessary elements to restore passenger confidence.

### Integrity

Airlines will need to work hard to re-establish passenger trust. Safety and protection will likely need to be a major focus to tempt passengers back into the air. COVID-19 has accelerated concern for the environment and airlines need to demonstrate that they are taking this seriously.

### Resolution

Airlines that have compromised the trust their passengers have through obfuscation over refunds and rebooking. It will be essential for airlines to automate this process and equip themselves and their passengers to be able to manage in a dynamically changing environment.

### Expectations

Airline communication processes have been exposed as being inadequate in many areas, rapid warning systems that set and reset passenger expectations will be necessary, a public broadcast advising passengers not to turn up at the airport when a flight is cancelled is no longer good enough.

### Empathy

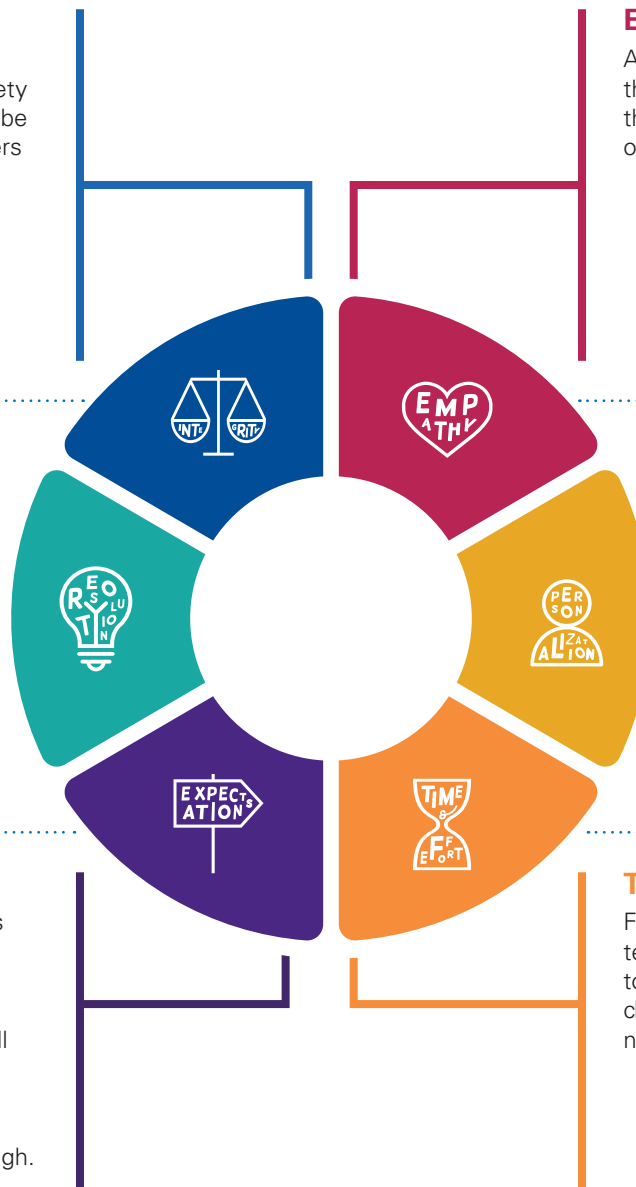
Above all airlines will need to show they care about their customers, their people and the world they operate in.

### Personalization

Passengers will likely gravitate to airlines that are able to equip them to take control themselves, to respond to a changing situation and enable them to take informed decisions about their future travel arrangements.

### Time and effort

Frictionless access to self-service technologies equipping passengers to re-plan their itineraries and change travel arrangements will need to be standard.





## Case Study

# Singapore Airlines

Singapore Airlines responded to COVID-19 by conducting a comprehensive review of the entire end to end journey. Drawing on medical experts, regulators and partners every aspect of the flight experience was forensically examined for health and safety. Passengers are provided with a Care Kit that includes a surgical mask, anti-bacterial hand wipes and a hand sanitizer. The focus being on enabling customers to travel with full confidence, knowing that the airline had taken the necessary steps to safeguard their well-being throughout their journey.

The response also drove innovation in its digital offerings, the SIA's e-Library is the digital replacement for the newspapers, magazines and seatback literature, the world's first Companion App, enables customers to control KrisWorld, SIA's in-flight entertainment (IFE) system, via their mobile devices. Soon to be launched features include digital food ordering services in the lounges and an in-flight e-menu and Print-n-Go solution, which would allow customers to print their boarding passes and baggage tags at airport self-service kiosks in a contactless way via the Singapore Air Mobile App or a QR code.<sup>4</sup>



## Case Study

# Delta

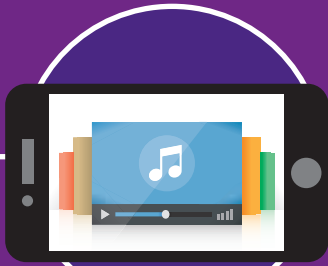
Delta responded rapidly to the public concern about flying by introducing electrostatic spraying of disinfectant on all planes before each flight, as well as deep cleaning of gate areas and jet bridges.

The airline scores highly amongst its passengers for its ticket flexibility, and for extending loyalty members' statuses into 2021. Additional measures include flight attendants delivering thoughtful new service procedures, reservation sales & customer care specialists offering unprecedented flexibility and empathetic care, pilots outlining air filtration processes before boarding, Airport Customer Service agents passing out Care Kits.<sup>5</sup>

<sup>4</sup> [https://www.singaporeair.com/en\\_UK/sg/travel-info/precautionary-measures/](https://www.singaporeair.com/en_UK/sg/travel-info/precautionary-measures/)

<sup>5</sup> <https://www.bbc.co.uk/news/business-53200904>

# Emirates



<sup>6</sup> <https://www.emirates.com/uk/english/help/covid-19/free-covid-19-cover/>

# Hall of Fame 2020

The leaders in this year's global CX research are well adapted to respond to new and emerging customer requirements. Each of the companies in this year's hall of fame are united by their desire to continually improve and innovate. They realize that digital services require a human touch and are mastering the art of highly personalized service across channels.



Note: Hall of Fame based on brands' CEE performance relative to their market, according to consumers in the market specified.



# Summary

Ultimately, whether passengers will feel confident enough to take to the skies depends on consumer confidence as recovery measures are put in place by governments, airports and airline operators and the sense amongst passengers of whether airlines and the whole travel ecosystem have adequately addressing their concerns regarding COVID-19 and its bearing on air travel.





# Get in touch

COVID-19 presents challenges to businesses — but also opportunities. It throws light on the need for organizations to put the customer at the heart of the business and have a coherent, consistent intent across their Front Office functions — and indeed connect the entire enterprise. It highlights the importance of digitalization and robust data collection so that organizations make decisions based on evidence, not instinct. And it foregrounds how essential it is for organizations to consider how each function fits together.

To flourish rather than flounder, businesses must determine the correct investment strategy across the Front Office by considering their customers, their brand and their place on the economic curve, so they can invest with greater certainty of return. All companies will be physically constrained during the measures to contain and limit the impacts of COVID-19 and their values will come under close scrutiny. However, they must leverage their ability to adapt and be resilient, embrace technology and, above all, trust their teams to put their customers' needs first and foremost — as this will bear fruit long after the pandemic is over.

If you have any questions regarding the possible impact from COVID-19 or are looking for help to position your customer experience strategy to be resilient in the face of future threats, please do not hesitate to get in touch with our global network of consultants.

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